Admin

PACE Advance – Online User Guide

EnfoTrust Networks, Inc

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Table of Contents

About This Guide

User Guide –May 2006

This edition, released May 2006, is designed to help you understand the functionality and usage of the Admin Guide – PACE Advance.

Conventions Used in this Guide

- Text describing an illustration always appears *after* the illustration.

Notices, Terms, and Conditions

Overview of PACE Advance - Online

PACE Advance – Online is the next generation of PACE reporting and report distribution. This web-based service allows users to customize their reporting structure to fully reflect the specific organizational structure of a rep group company.

The goal of PACE Advance – Online is to deliver relevant and timely information to users organized in such a way as to be useful in organizational management, allowing users to set service performance standards for their organization and then set up a reporting structure that indicates how well those standards are being met.

PACE Advance – Online helps rep group management answer the following key questions to support the management and decision-making processes:

- Are we doing the right work?
- What is done and what is not done?
- Are enough resources being provided for a given area or project?
- How can I easily summarize the data I need for my Report Card?

PACE Advance - Online portal features

- Project service cycle configuration
- User-friendly Portal/Dashboard Interface
- Organizational hierarchy modeling
- Reporting hierarchy modeling
- Service scope configuration

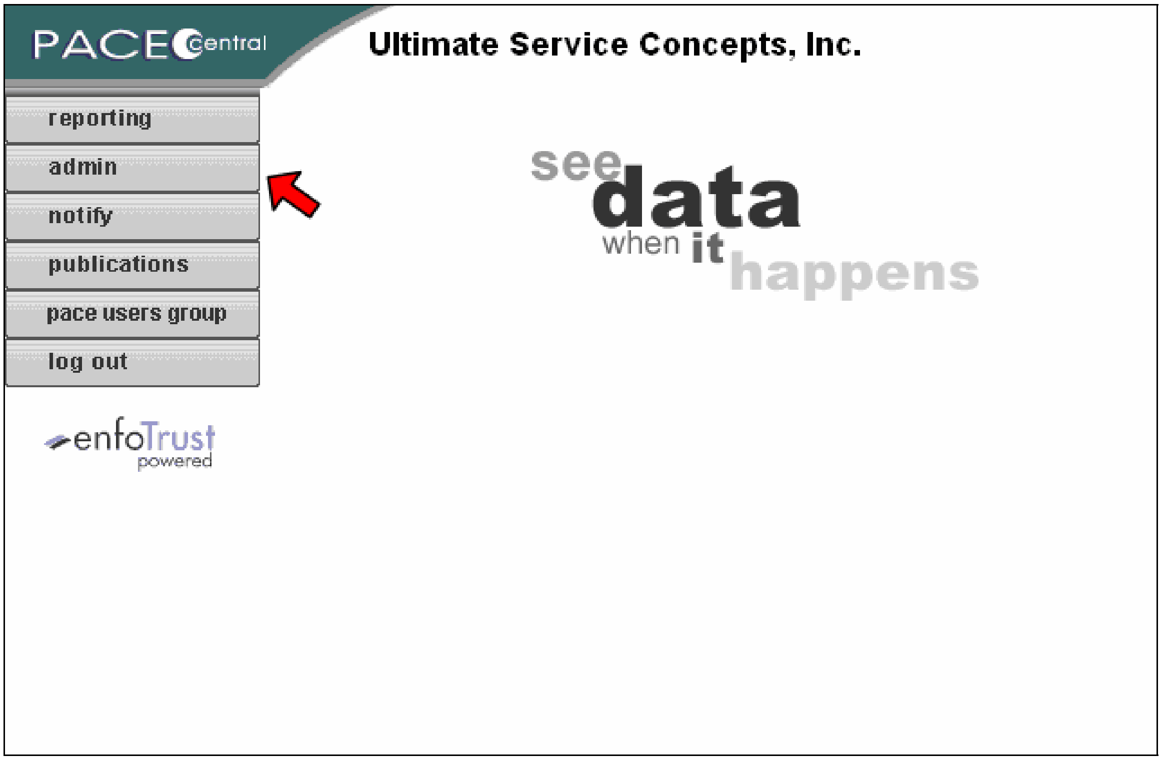
How to Log In

Enter http://www.thd-issi.com in your web browser address bar and click **[GO].**

Log In

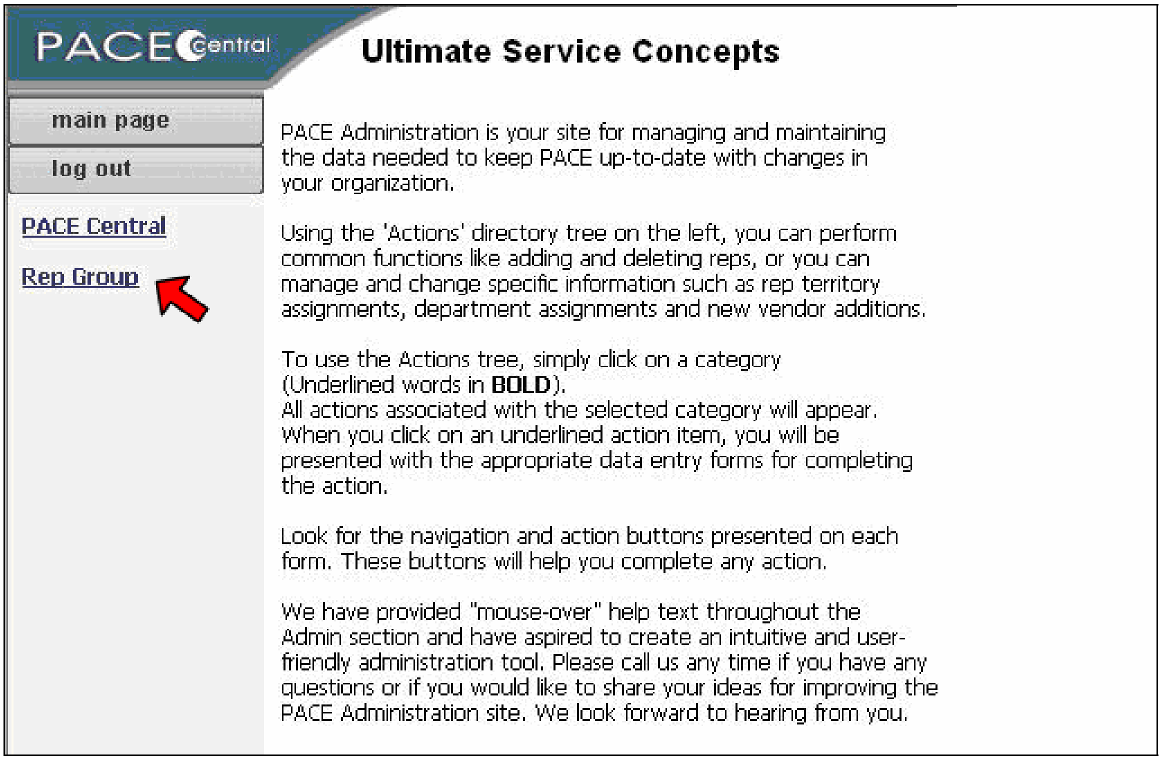
- Enter your assigned **USER NAME**.
- Enter your assigned **PASSWORD**.
- After clicking **[Log In]** the PACE Central main page will load.

PACE Central Main Page



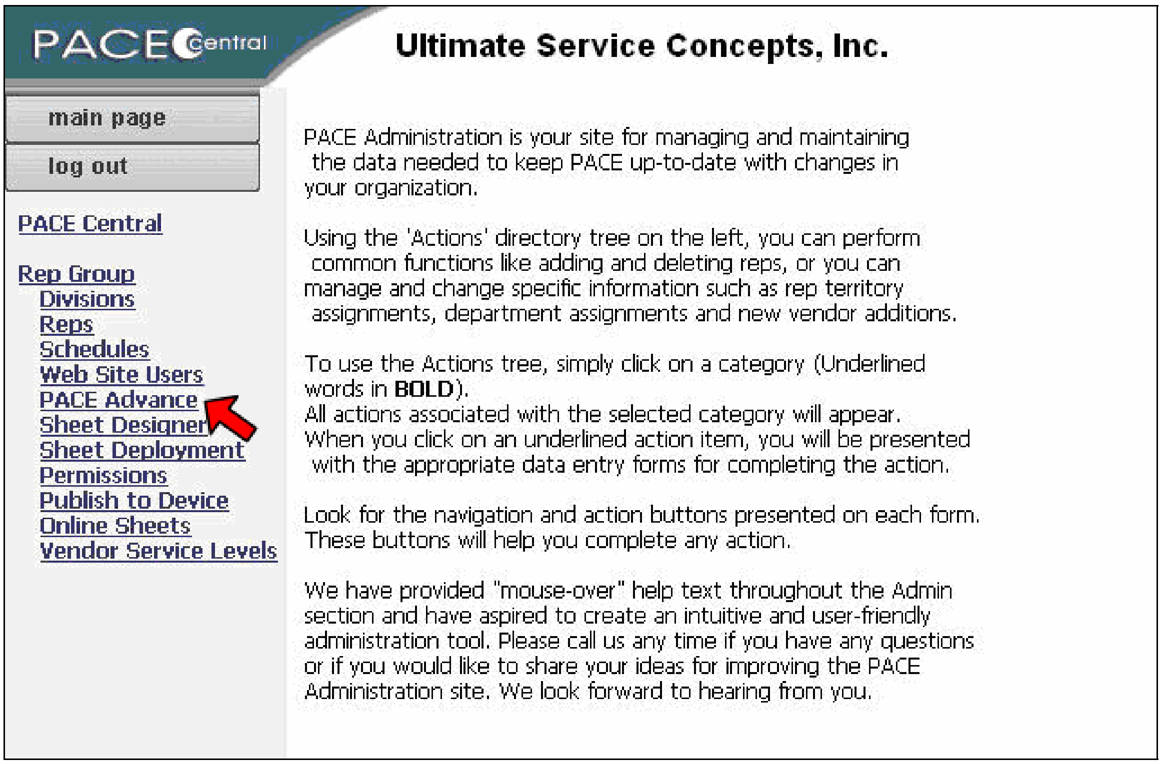
- Click on **admin**, and the Admin Page will load.

Admin Page



- Click on **Rep Group**, and the Rep Group menu will open.

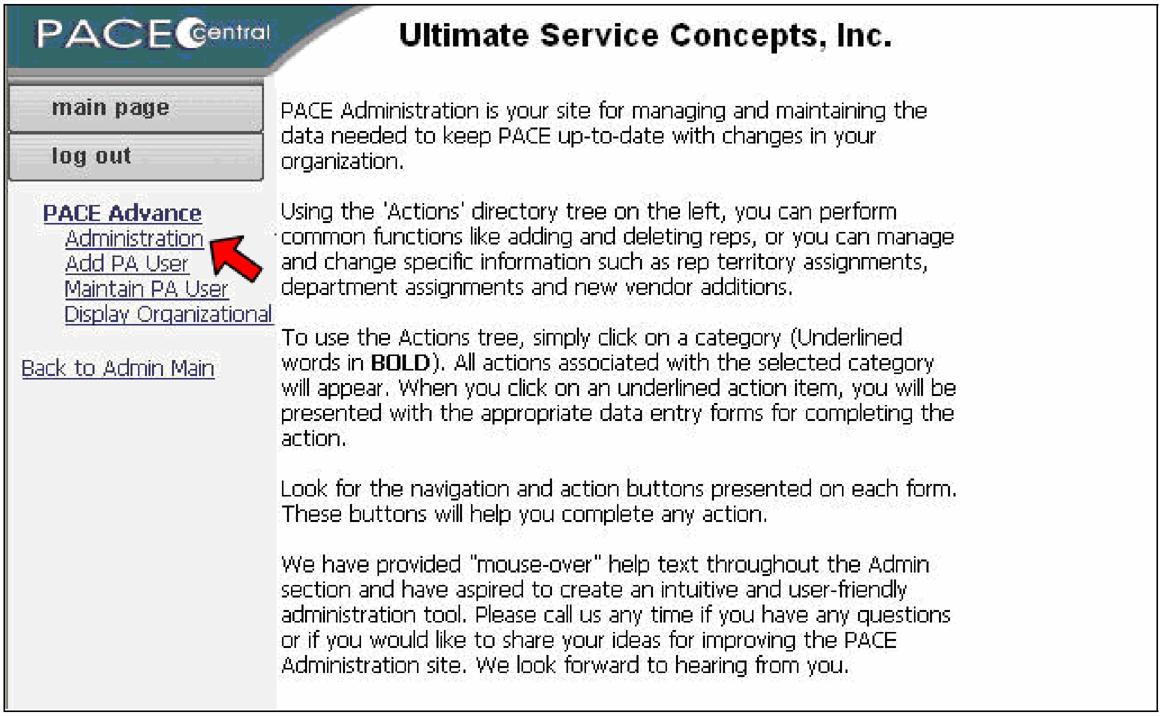
- In the Rep Group Menu, click on **PACE Advance**.



- This will open the Pace Advance menu.

PACE Advance

PACE Advance – Online is a web-based portal that allows companies to configure PACE in the format that best suits their business needs. The product allows companies to model their organizational hierarchy and build a reporting structure specific to that hierarchy. It has 4 submenus: Administration, Add PA User, Maintain PA User and Display Organizational Chart.



Administration

This section allows the user to manage the various components of PACE Advance, including setting up and editing Rep Group performance Attributes, organizational Tiers, position Titles, reporting Cycles, and Sheet Cycles.

When **Administration** is clicked, the Administration screen is loaded and the Attributes section is loaded first.

PACE Advance

Administration Screen

Attributes

This function is used to set up base standards for Field Service Reps to meet in terms of performance goals. Standards can be set for Rep Group Attributes, the percent of service completion based on Sheet Types completed, and the percent of service completion based on store Classes serviced.

Rep Group Attributes

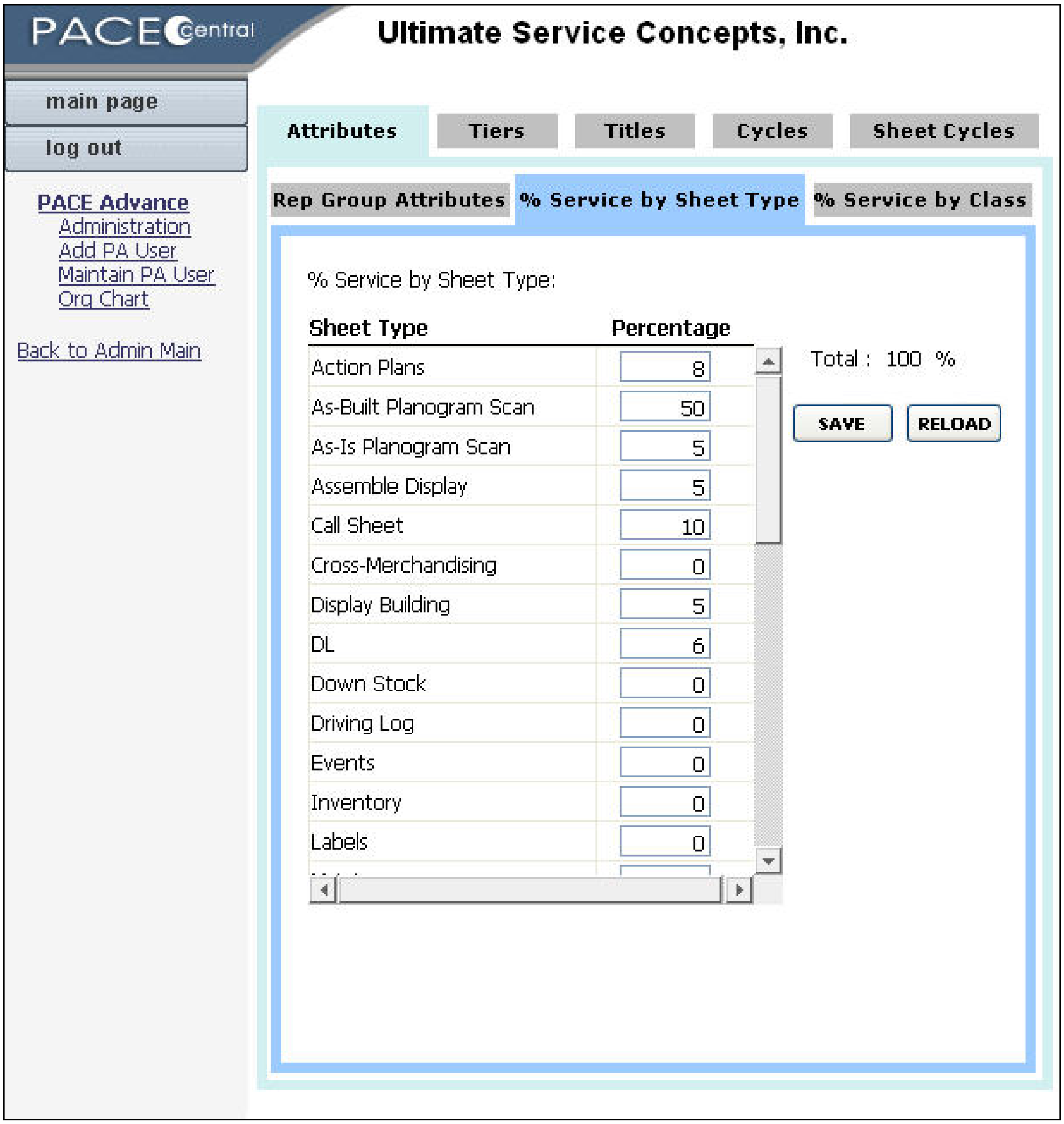
This section is used to set standards for rep evaluation in GAP Time Tolerance, Standard Lunch Minutes, and Max Tiers.

- **GAP Time Tolerance**: used to set a standard for reps to meet in terms of GAP time, or time spent between work sheets on a PDA.
- **Max Tiers:** used to set a maximum limit on the number of organizational Tiers within a Rep Group.
- **Standard Lunch Minutes**: used to set a standard for reps to meet in terms of Lunch Minutes or time spent out of the store on lunch.

- **Value**: this field is used to edit the value of the Rep Group Attributes.
- **SAVE:** this button saves entered Value field data.
  - Value fields must have a numeric entry to SAVE.
  - If the value is correct, any changes will be saved and a message appears: "Save Successful".
- **RELOAD:** When this button is clicked, the saved attribute data will load. Any unsaved data will be lost.

% Service by Sheet Type

This function allows users to set standards for Field Service Reps to meet in service completion of various Sheet Types such as Cross-Merchandising, Action Plans, Special Projects, and the like.

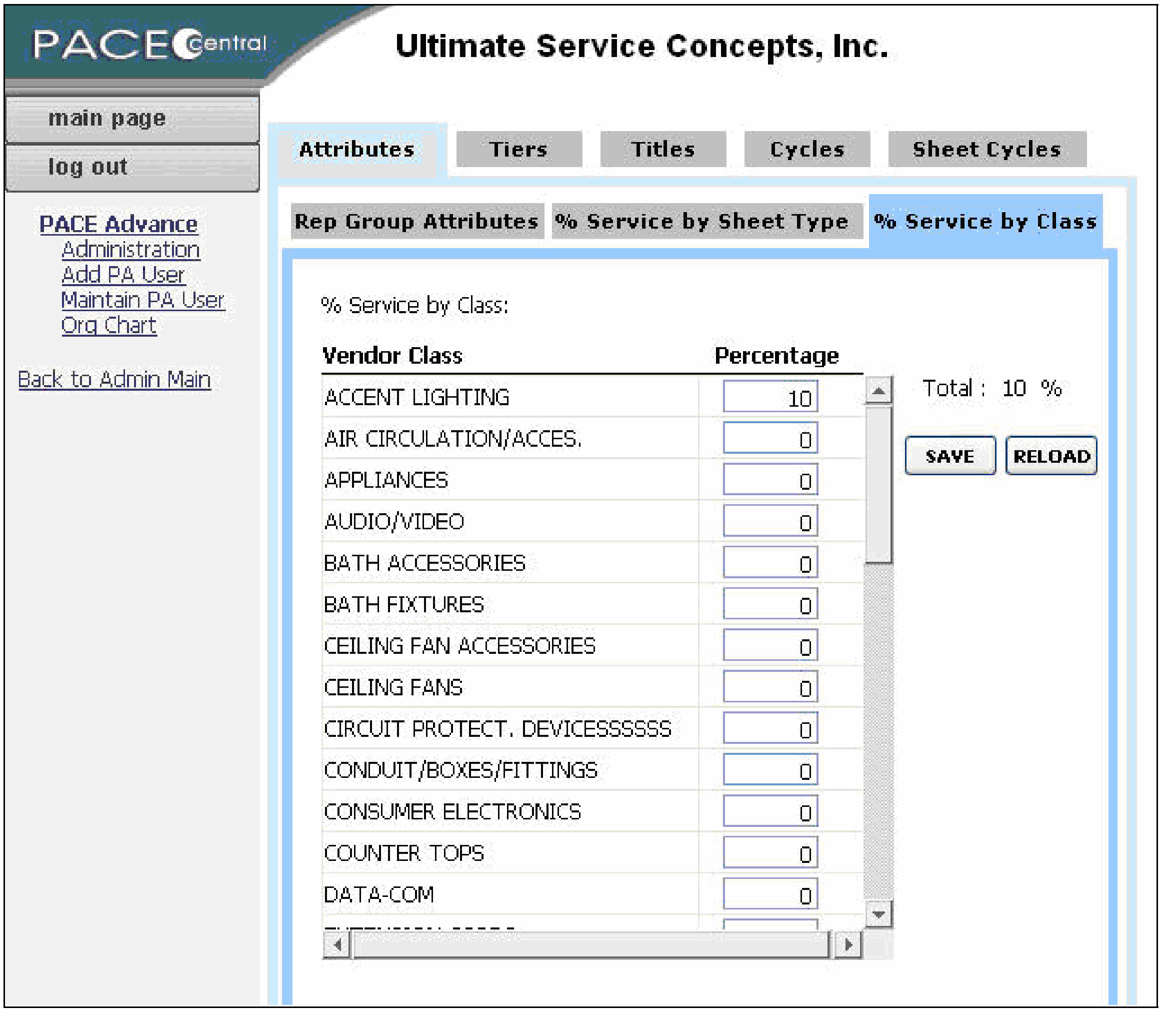


- **Percentage:** this data field is used to edit the standard completion percentage of each Sheet Type.
- **Total:** this field displays the total Sheet Type standard completion Percentage.

- **SAVE:** this button saves the entered completion percentages.
  - If a character other than a numeric is inserted in any of the percentage fields, a message appears: "Please enter an integer between 0 and 100".
  - If the total percentage exceeds 100%, a message appears: "Unable to save – total exceeds 100%!"
  - If the Total percentage is 100% or less, a message appears: "Save Successful".
- **RELOAD:** When this button is clicked, the saved percentage data will load.

% Service by Class

This function allows users to set standards for Field Service Reps to meet in service completion in various Vendor Classes serviced by the Rep Group.



- **Percentage:** this data field is used to edit the standard completion percentage of each **Vendor Class** to be serviced by the Field Service Reps.
- **Total:** is the total **Vendor Class** Percentage.
- **SAVE:** This button saves all entered Vendor Class percentages.
  - If a character other than a numeric is inserted in any of the percentage fields, a message appears: “Please enter an integer between 0 and 1000”.
  - If the total percentage exceeds 100%, a message appears: “Unable to save – total exceeds 100%!”
  - If the total percentage is 100% or less, a message appears: “Save Successful”.

- **RELOAD:** When this button is clicked, the saved Vendor Class data will load.

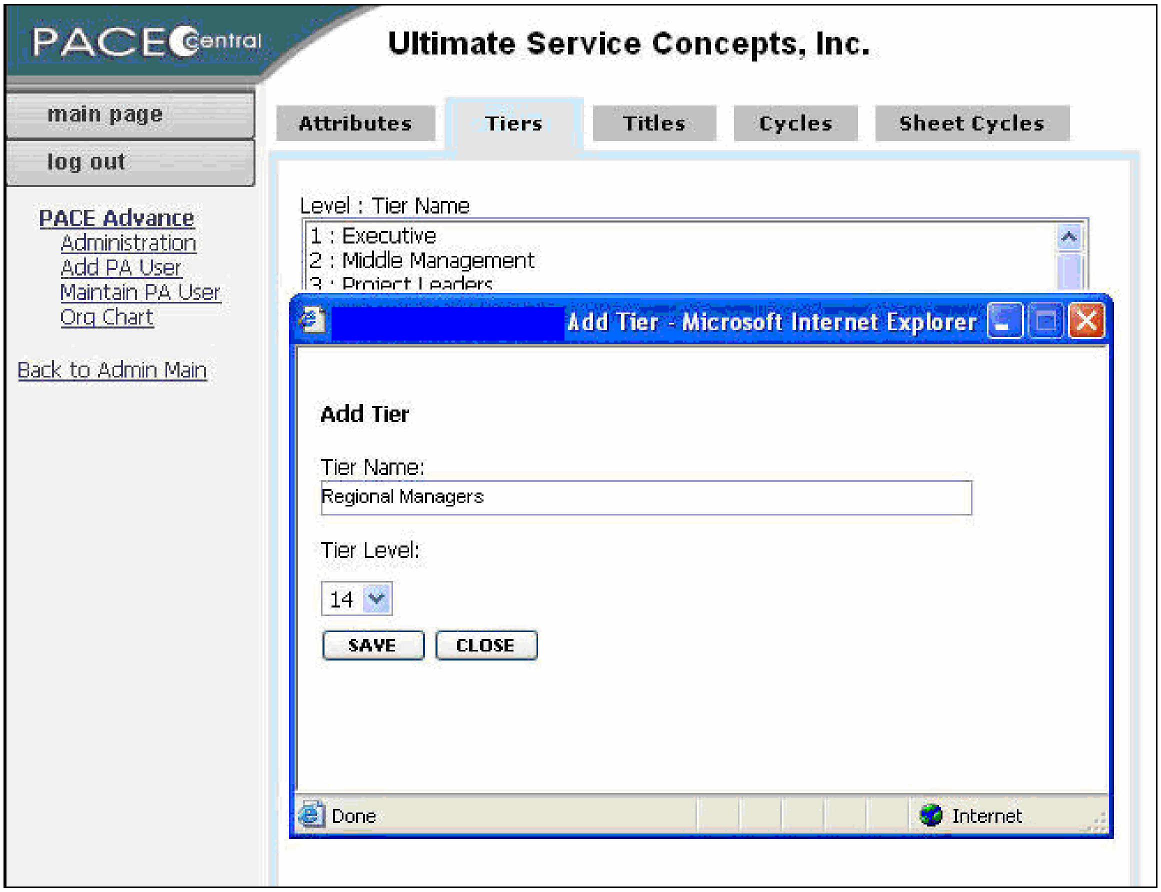
Tiers

This section allows users to add, edit, or delete a Tier. A Tier is a level of management within a Rep Group. When the Tiers tab is clicked, the Tier screen is loaded.

Tier Screen

- **ADD**: when this button is clicked, the Add Tier Screen is loaded.

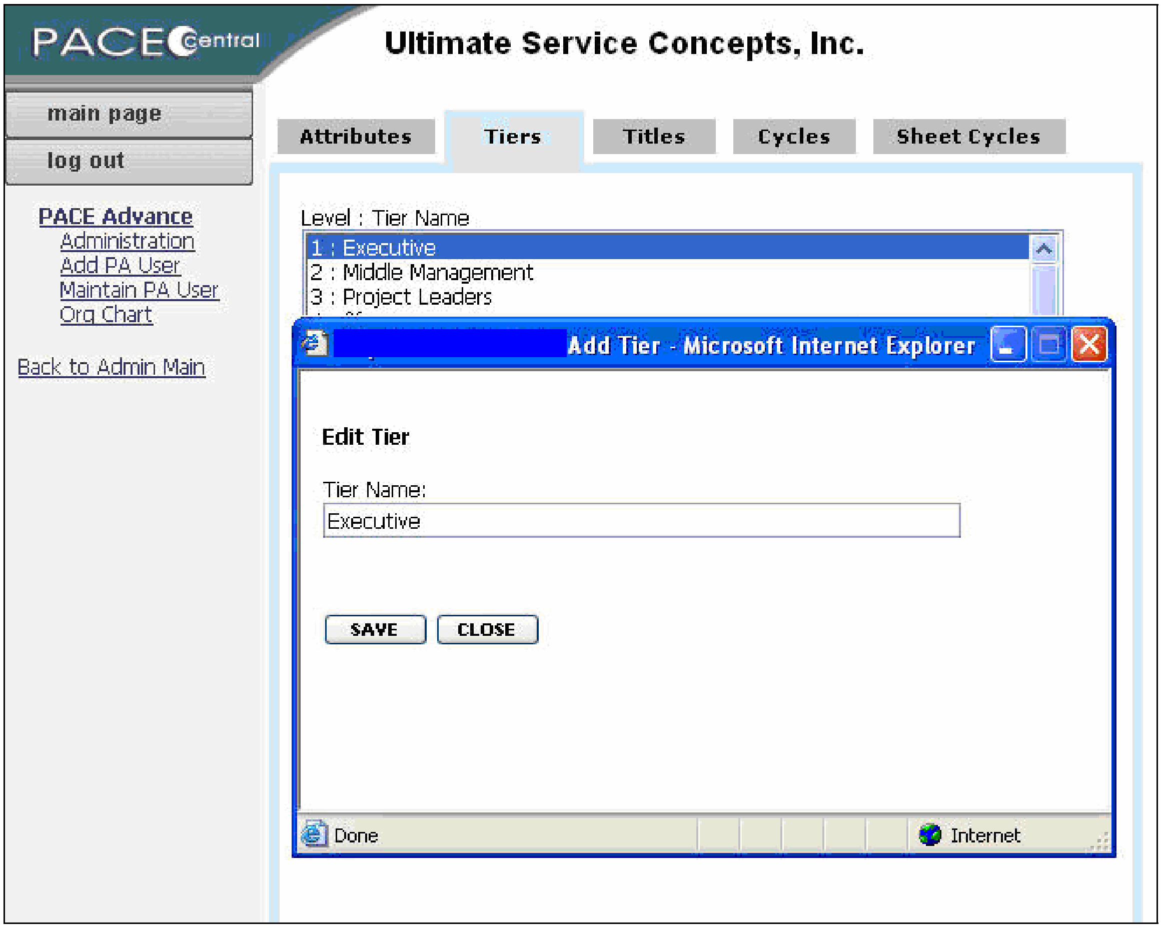
Add Tier Screen



- **Tier Name**: is a text field to insert the Tier Name. A Tier must have a name to be added to the system. Admin users can create their own Tier names to fit the Rep Group organizational structure.
- **Tier Level**: is a drop down list that loads the Tier Level. Select the level at which the Tier exists in the organizational structure.
- **SAVE**: Saves new Tier in system.
  - If all data is inserted, a message appears: "Save Successful".
- **CLOSE**: The screen is closed and no changes are saved. The new Tier must be saved before closing the window.

- **EDIT**: this button allows user to edit existing Tiers.
  - If no tier is selected, a message appears: "Please Select Tier to Edit".
  - If a Tier is selected, the Edit Tier screen is loaded.

Edit Tier screen

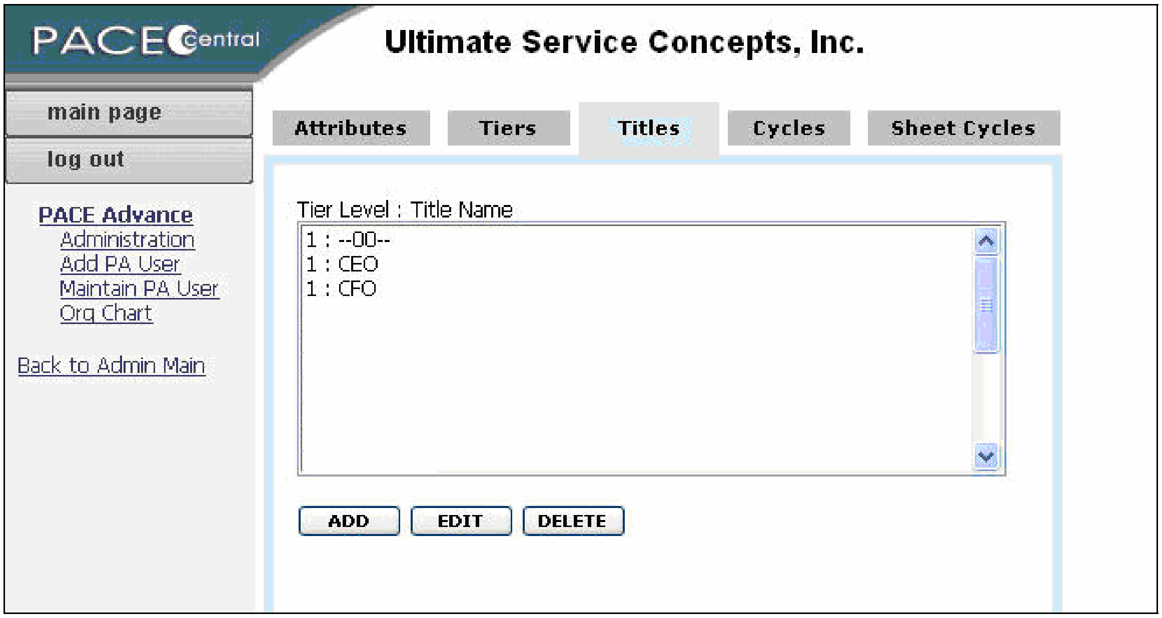


- **Tier Name**: is a text field that allows editing the Tier Name.
- **SAVE**: Saves changes to Tier Name.
  - o If the Tier Name is deleted, a message appears: "-Tier Name". Tier must have a name to continue.
  - o If the Tier Name is edited, a message appears: "Update Successful".
- **CLOSE**: When clicked, the pop up is closed and no changes are saved.
- **DELETE**: this button allows user to delete existing organizational Tiers.
  - o If no tier is selected, a message appears: "Please Select Tier(s) to Delete".
  - o If a tier with titles is selected, a message appears: "Unable to delete tiers with associated titles".
  - o If a tier with no titles is selected, a message appears: "Delete Successful".

Titles

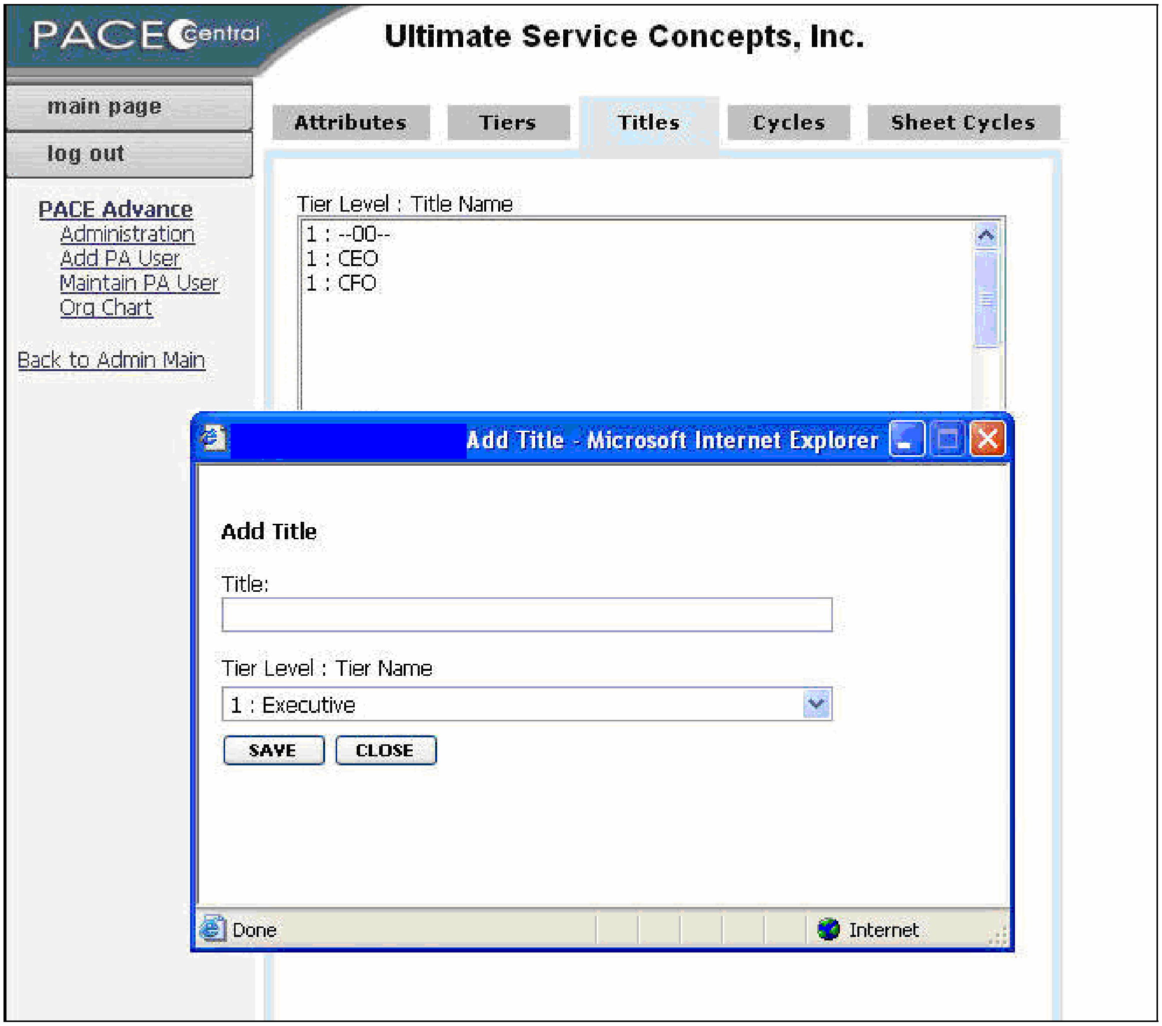
Position Titles from CEO down to Field Service Rep can be added to the system and assigned to Tiers in the organizational structure. **The Titles Screen** allows adding, editing or deleting a title. When the **Titles** tab is clicked, the Title screen is loaded.

Titles Screen



- **ADD:** When this button is clicked, the Add Title Screen is loaded.

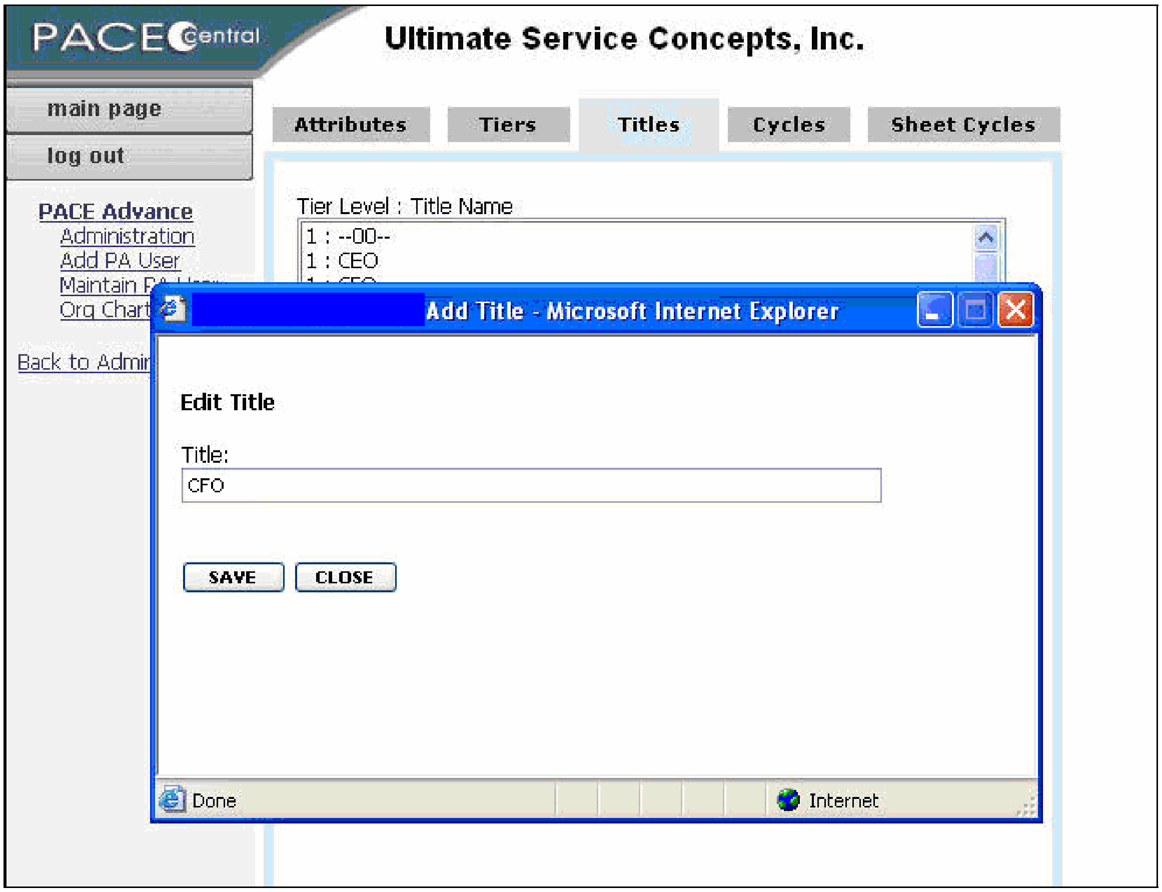
Add Title Screen



- **Title**: is a text field to insert the Title Name.
- **Tier Level**: is a drop down list that loads the Title Level.
- **SAVE**: Saves new Title into the system.
    - If no Title Name is inserted, a message appears: "-Title Name". You must enter a Name to add a new Title.
    - If all data is inserted, a message appears: "Save Successful".
- **CLOSE**: The screen is closed and no changes are saved.

- **EDIT**: allows user to edit existing Titles.
  - If no Title is selected, a message appears: "Please Select Title to Edit".
  - If a Title is selected, the Edit Title screen is loaded.

Edit Title Screen



- **Title**: is a text field that allows editing the Title Name. A Title must have a name to be saved into the system.
- **SAVE**: Saves changes to Tier Name.
  - If the Title Name is deleted, a message appears: "-Title Name" Tier must have a name to continue.
  - If the Title Name is edited, a message appears: "Update Successful".
- **CLOSE**: When clicked, the pop up is closed and no changes are saved, Any changes must be saved before closing window.

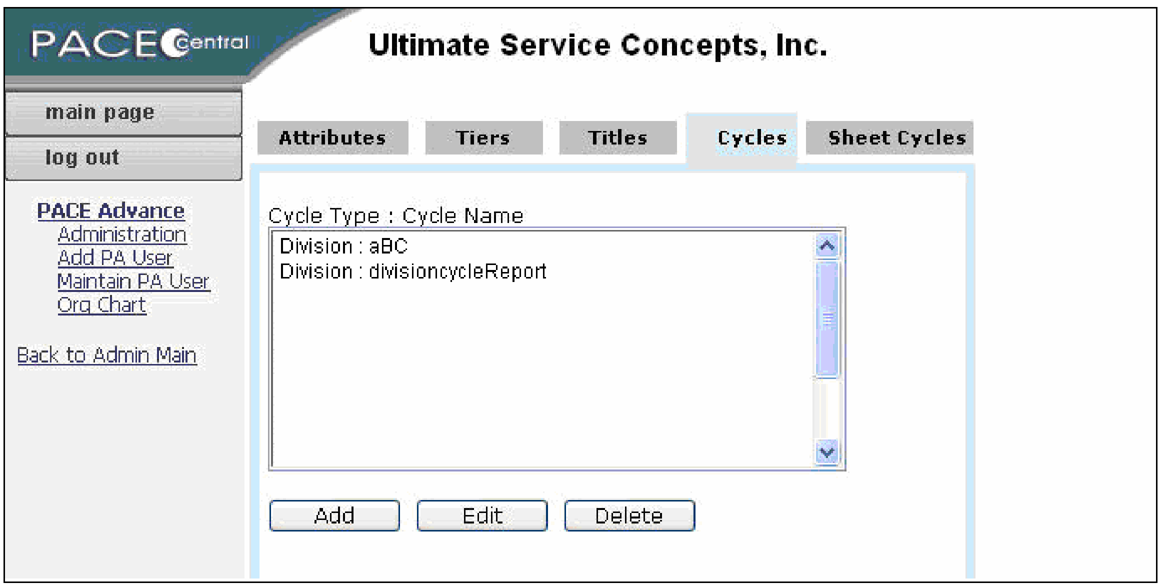
- **DELETE**: this button allows user to delete existing organizational Tiers.
    - If no title is selected, a message appears: "Please Select Title(s) to Delete".
    - If a title with users is selected, a message appears: "Can not delete Titles because there are Users associated with these Titles".
    - If a title with no users is selected, a message appears: "Delete Successful. (number of deleted titles) Title(s)".

Cycles

This function allows user to customize reporting Cycles. A reporting Cycle sets parameters for start and end dates, how many days will be in a Cycle, the frequency or number of Cycles that will run, and whether the Cycle will be recurring or running once only.

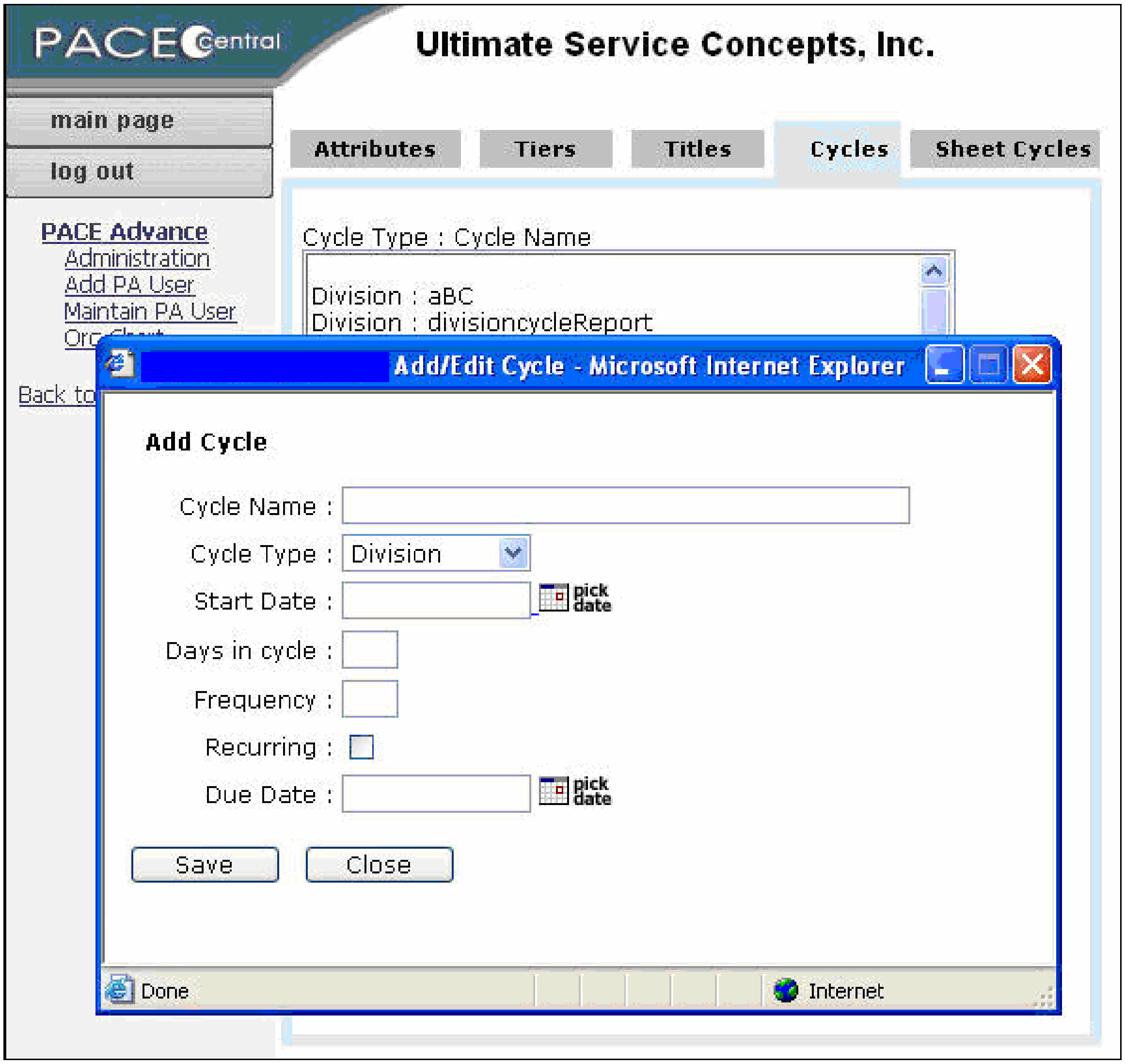
When the **Cycles** tab is clicked, the Cycles screen is loaded.

Cycles Screen



- **Cycle Type**: Is a list that loads all the Cycles currently available to a user.
- **ADD**: When this button is clicked, the Add Cycle screen is loaded.

Add Cycle screen

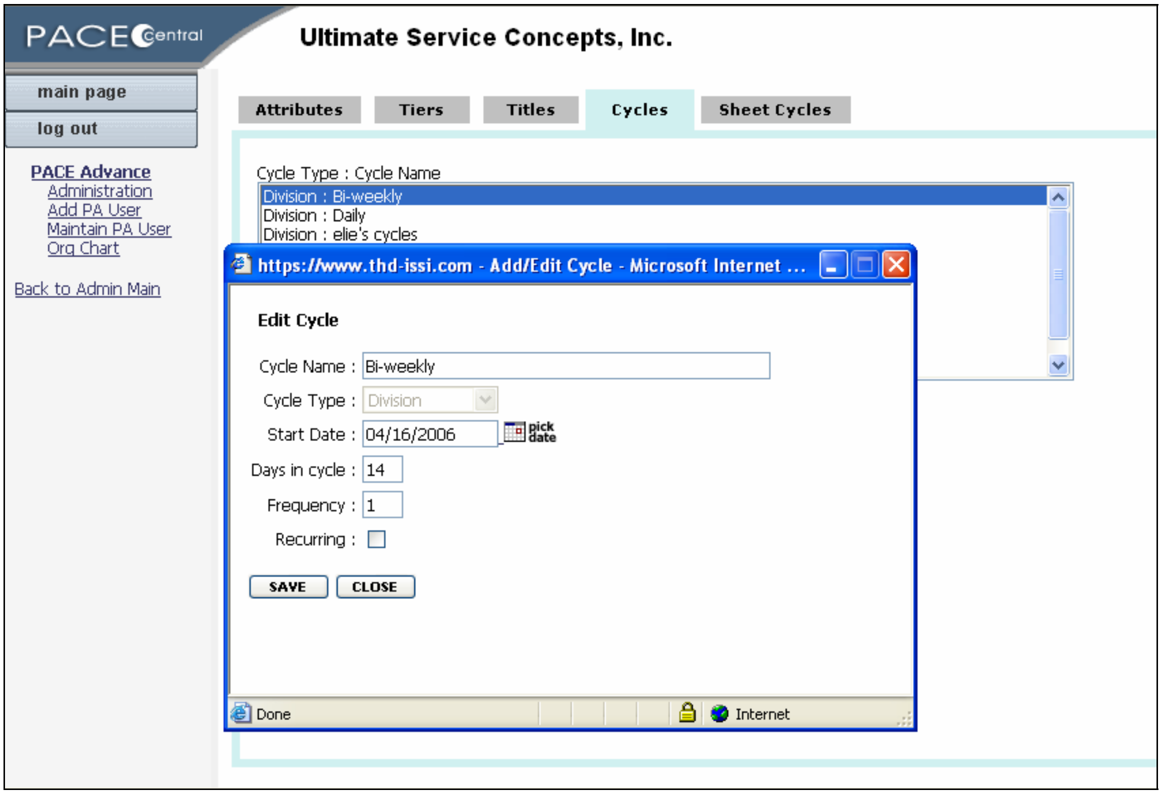


- **Cycle Name**: is a required text field where the cycle name is inserted**;** accepts all alpha-numeric characters. New Cycles must have a name to be added.
- **Cycle Type**: Is a drop down list that loads the cycle types. Users can choose between Division Report Cycles or Store Report Cycles.
- **Start Date**: when **'Pick Date'** is clicked, a pop up window to select a Start Date for the Cycle will load.
- **Days in cycle**: is a required text field where users can set how many days the Cycle will run. Field accepts numeric entries only.
- **Frequency**: is a required text field where users can designate how many times the reporting Cycle will run. Field accepts numeric entries only.

- **Recurring**: Is a check box that enables the recurrence of the reporting Cycle until the due date.
- **Due Date**: When '**Pick Date'** is clicked, a pop up window to select an end date for the Cycle will load. It can not be set unless the Recurring box is checked.
- **SAVE**: This button saves new Cycle to system.
  - In case one of the required fields is not filled out or selected, a message appears listing those fields. You cannot save unless required fields are entered.
  - If all data fields are inserted and the Cycle Name is entered, a message appears: "Save Successful."
- **CLOSE**: The pop up window is closed and no changes are saved. You must save new Cycle before closing window.

- **EDIT**: this button allows users to edit existing Cycles.
  - If no Cycle is selected, a message appears: "Please Select Cycle to Edit", you can only edit one Cycle at a time.
  - If many Cycles are selected, a message appears: "Please Select One Cycle Only".
  - If one cycle is selected, the Edit Cycle pop up window appears.

Edit Cycle Screen

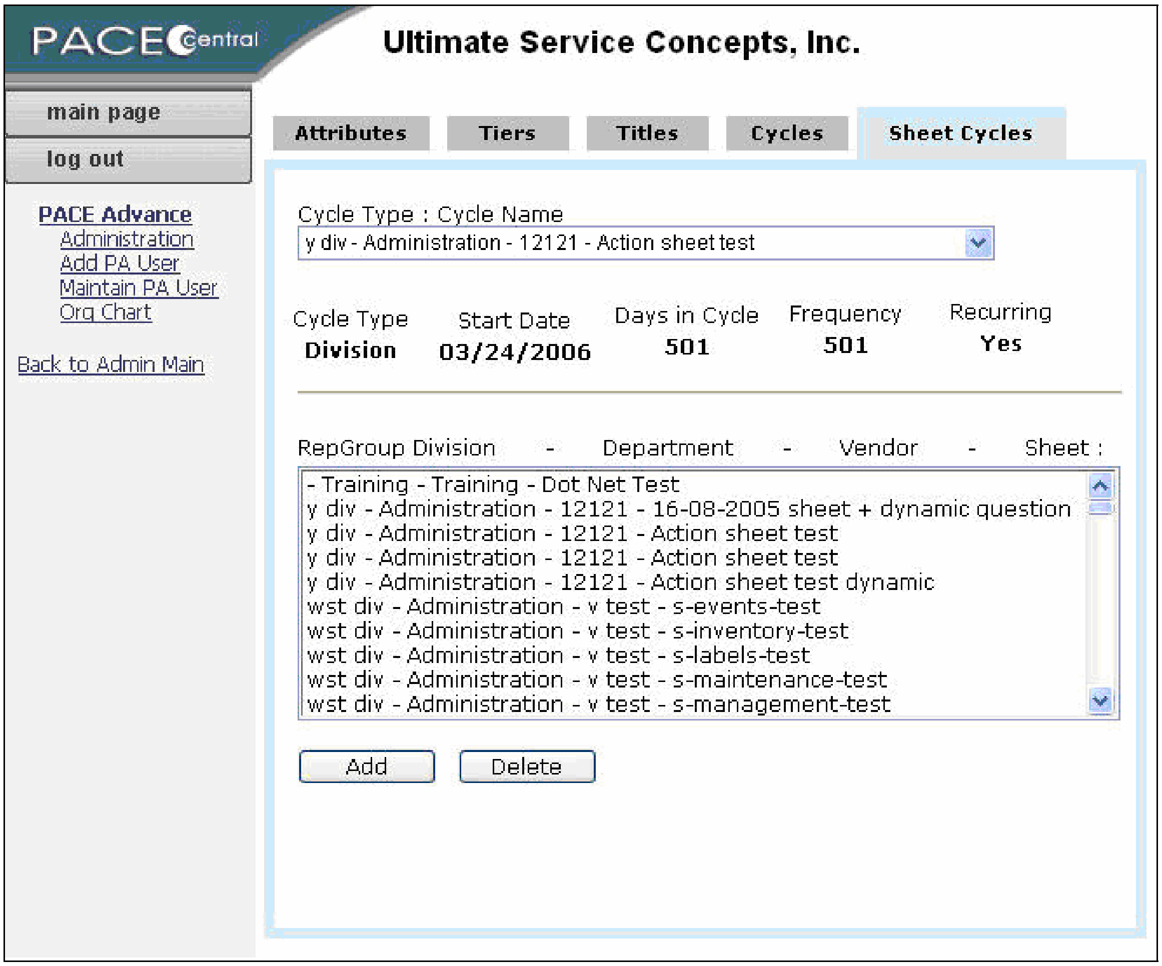


- **SAVE**: this button saves changes to the Cycle.
  - In case any of the required fields are left blank or not selected, a message appears listing these fields.
  - When all required fields are filled, a message appears: "Update Successful." You must save edited Cycle before closing window.
- **DELETE**: this button allows user to delete existing Cycles.
  - If no Cycle is selected, a message appears: "Please Select Cycle(s) to Delete."
  - If a Cycle is selected, a message appears: "Delete Successful."

Sheet Cycles

This section allows users to add specific vendor or service class worksheets to a reporting Cycle. A Sheet Cycle is a reporting Cycle with sheets assigned to it. When the **Sheet Cycles** tab is clicked, the Sheet Cycle screen is loaded.

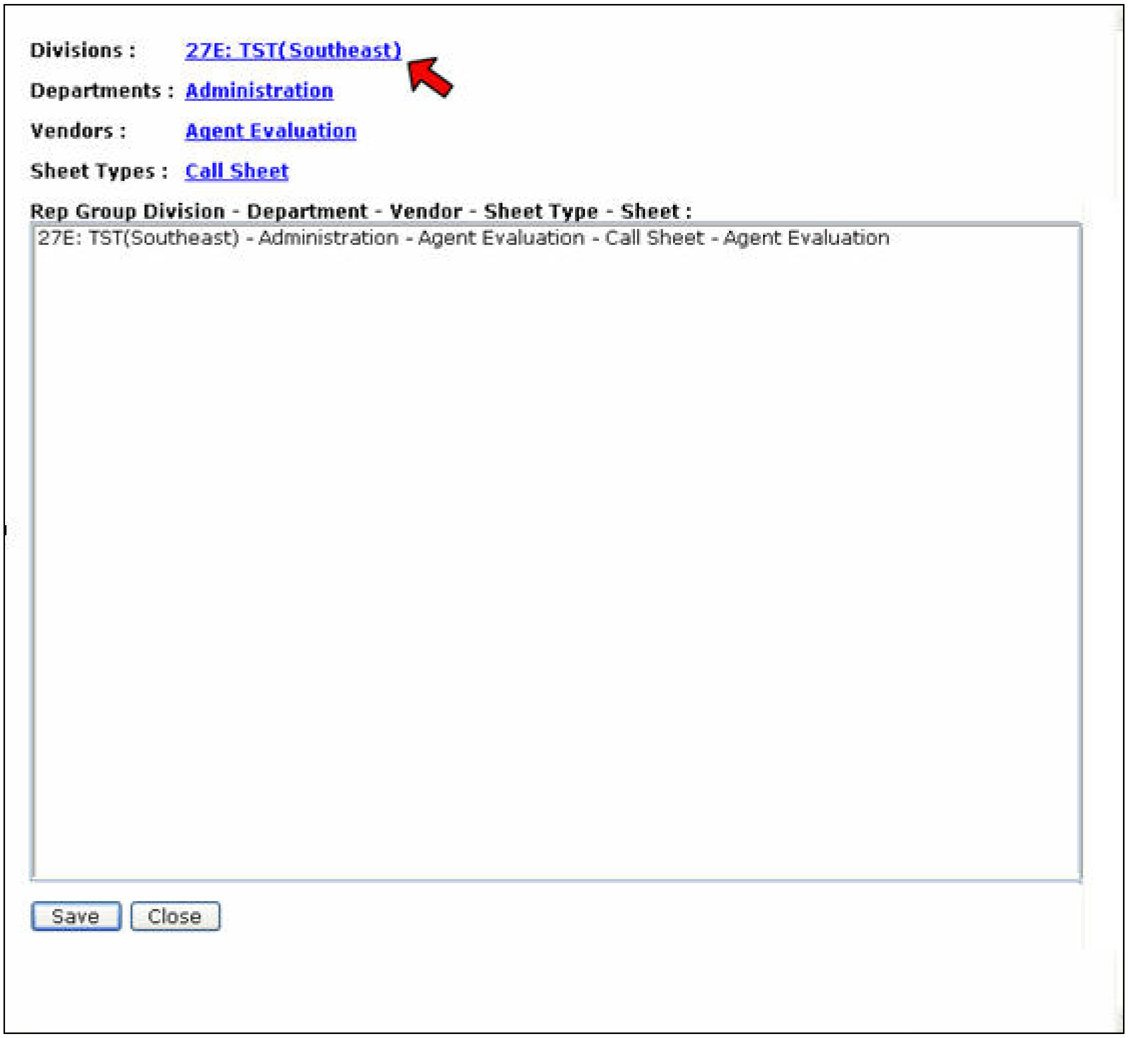
Sheet Cycle Screen



- **Cycle Type: Cycle Name**: is a drop down list that loads the Cycles available to a user.

- **ADD**: Clicking this button loads the Add sheet screen.

Add sheet screen



- **Divisions**: Clicking this link displays all the divisions available to the user. User can then select one division or multiple divisions by holding down the Ctrl key.
- **Departments**: Clicking this link displays all the departments available to the user, according to the selected division(s).
- **Vendors**: Clicking this link displays all the vendors available to the user, according to the selected division(s) and department(s).
- **Sheet Types**: Display all the sheet types available to the user, according to the selected division(s), department(s) and vendor(s).
- **SAVE**: To save, at least one sheet must be selected from the list.
    - If no sheet is selected, a message appears: “Please select Sheet(s).”
    - If a sheet is selected, the page is closed, the changes are saved and a message appears: “Save successful.”

- **CLOSE**: The page is closed and no changes are saved. New sheet must be saved before closing the window.
- **DELETE**: allows deletion of existing sheets.
  - A sheet must be selected to be deleted, If no sheet is selected, a message appears: "Please Select Sheet(s) To Delete."
  - If a sheet is selected, a message appears: "Delete Successful."

Add PA User

This function is used to add new users to the PACE Advance - Online system; it is applied to Group Admin and Division Manager Users.

It has 5 submenus: Profile, Direct Reports, My Stores, My Reps, and Subscriptions.

When Add PA User is clicked, the Add PA User screen is loaded directly to the Profile tab.

Add PA User Screen

- **User Type**: is a drop down list that loads the user types available for PA user (Group Admin and Division Manager).

User Name: Is a drop down list that loads all employees in the PACE Central system eligible to use Pace Advance according to the selection in the User Type field. When a user is selected, the personnel data is loaded.

Profile Screen

- **First Name:** A required field that loads the first name of the selected user.
- **Last Name:** A required field that loads the last name of the selected user.
- **Email:** Is an optional field where the user email can be inserted. This field is required if user wishes to receive reports via e-mail.
- **Title:** Is a drop down list that loads all the Titles available to a user.
- **Permission Mask:** Is a drop down list that loads all the permissions available to a user.
- **SAVE**: All required fields must have a value to save new user.
  - If all required fields are inserted, a message appears: "Save Successful".

Direct Reports

This function allows user to assign Direct Reports to a new user profile. Direct Reports are the managers that report directly to the selected PACE Advance – Online user. When the **Direct Report** tab is selected, the Direct Report screen is loaded.

Direct Report screen

- **Candidate Direct Reports:** Displays all the direct reports available to all users.
- **My Direct Reports:** Displays all the direct reports assigned to the selected user.
- **Add>**: When add is clicked, the selected Candidate Direct Report is placed in the My Direct Reports table.

- <**Remove**: When Remove is clicked, the selected Direct Report is removed from the My Direct Reports table.

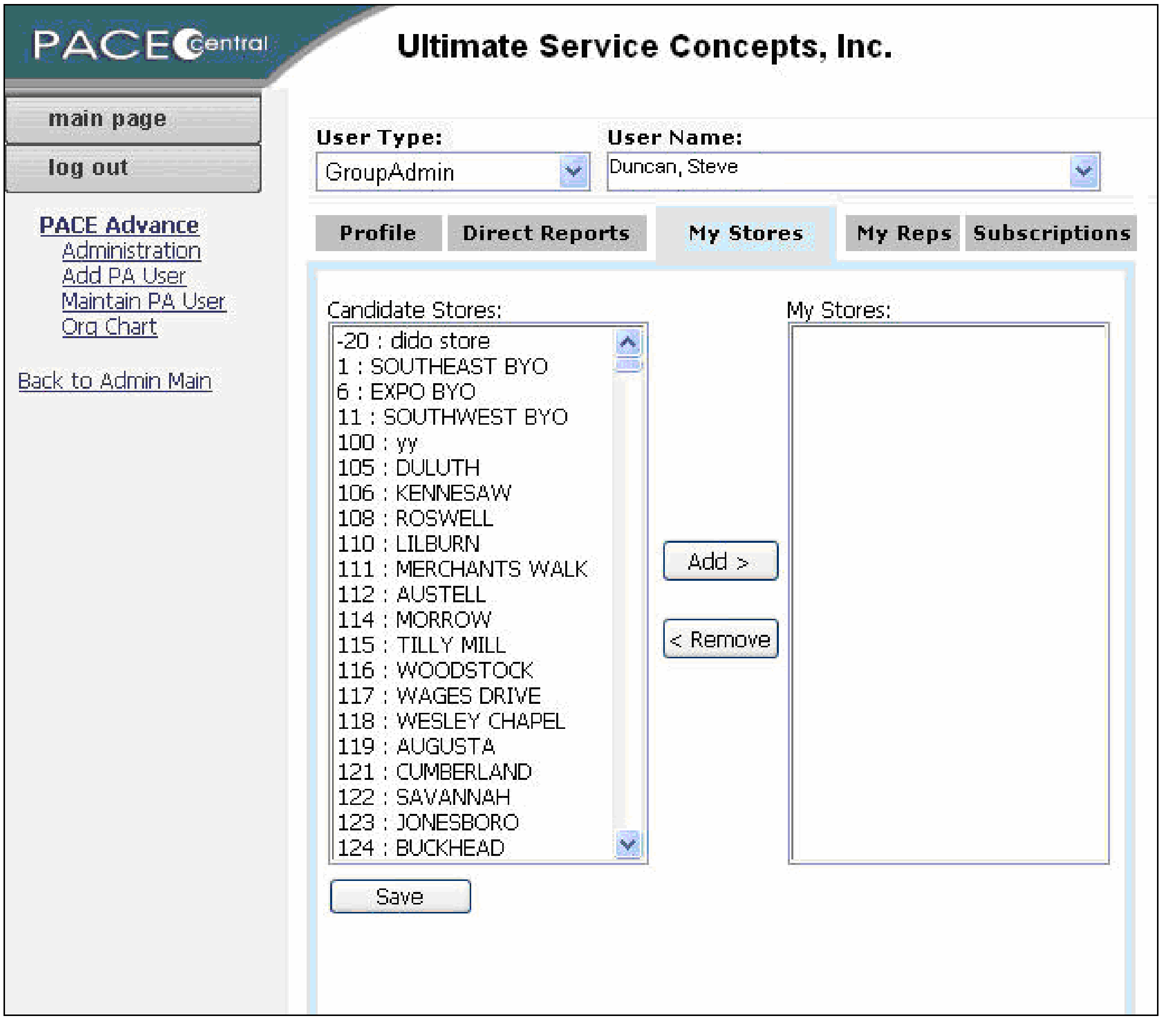
- **SAVE**: When this button is clicked, the data is saved to the user profile, and a message appears: "Save Successful".

  - If the user selected is not a Pace Advance user type, the Direct Report screen is loaded with a message: "The selected user is not a Pace Advanced user." To assign Direct Reports to a user, that user must also be a designated PACE Advance – Online user.

My Stores

This function allows user to assign stores to a PACE Advance – Online user profile. When the **My Stores** tab is selected, My Stores screen is loaded.

My Stores screen



- **Candidate Stores:** Displays all the Candidate Stores available to all users.
- **My Stores:** Displays all the Stores assigned to the selected user.
  - **Add>:** When this button is clicked, the selected Stores are removed from Candidate Stores table to the My Stores table.

- o **<Remove:** When this button is clicked, the selected Stores are removed from My Stores table to the Candidate Stores table.

- **SAVE**: When Save is clicked, a message appears: “Save Successful”.

My Reps

This function allows user to add subordinate field service reps to a user profile. When **My Reps** is selected, My Reps screen is loaded.

My Reps screen

- **Candidate Reps:** Displays all the Candidate Reps available to all user.
- **My Reps:** Displays all the Reps assigned to the selected user.
  - **Add>:** When this button is clicked, the selected Reps are added to the My Reps table.

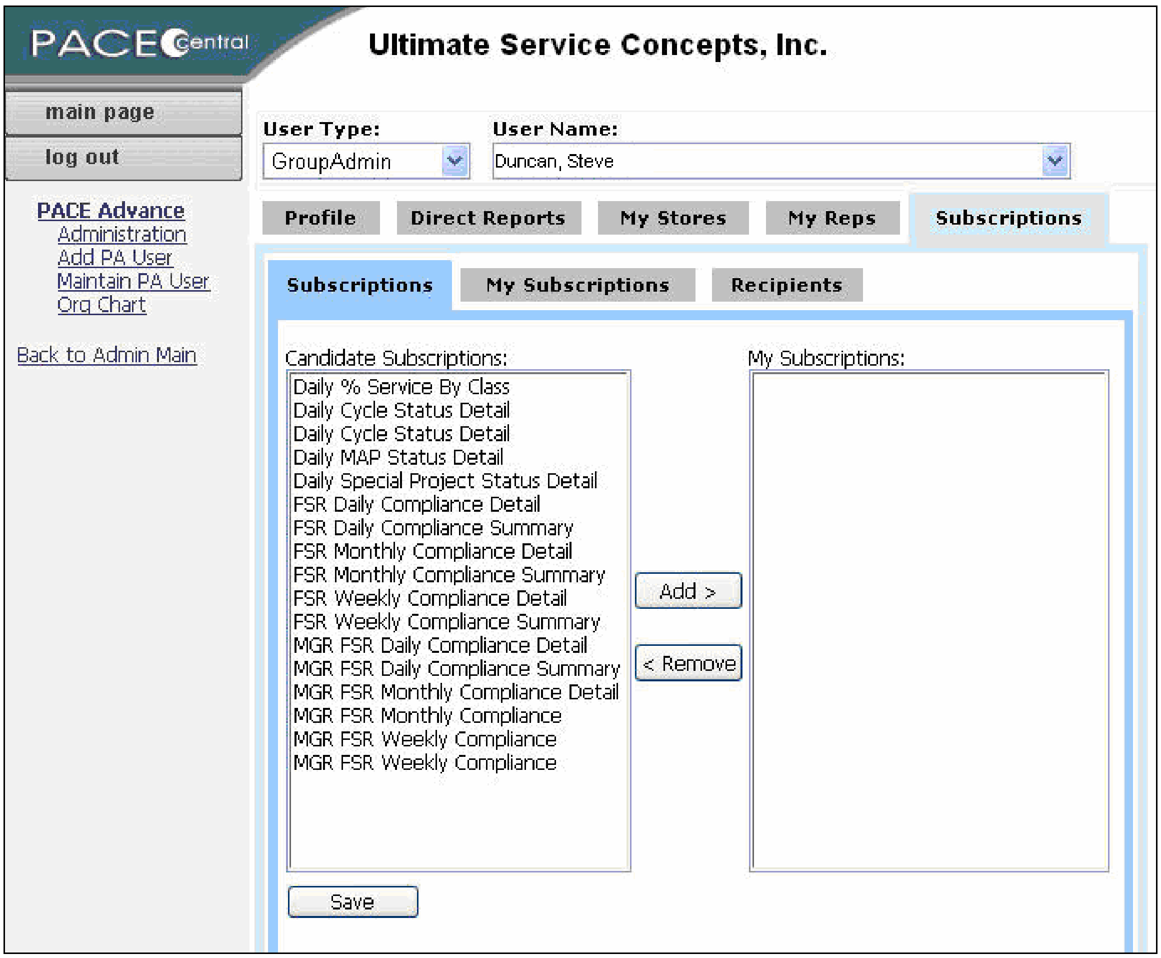
- o **<Remove:** When Remove is clicked, the selected Reps are removed from My Reps table.

- **SAVE**: When this button is clicked, the Rep data is saved and a message appears: "Save Successful."

Subscriptions

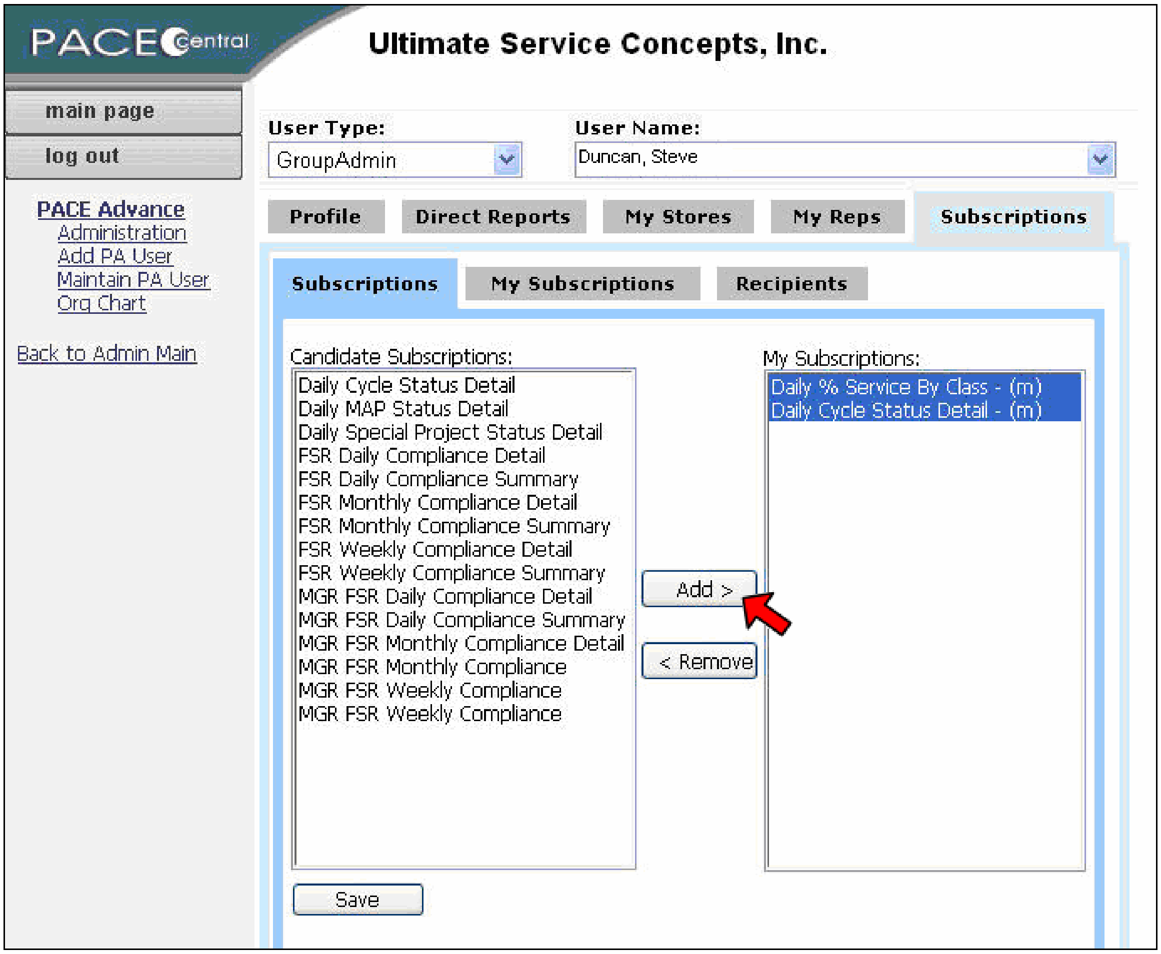
PACE Advance – Online employs a new report distribution system that allows a user to assign report Subscriptions to a user profile. The Subscription reports run automatically and are distributed to the user via either e-mail, AMP message, or online. When the **Subscriptions** tab is selected, the Subscriptions screen is loaded.

Subscriptions screen



- **Candidate Subscriptions:** Displays all the Candidate Subscription reports available to all users.
- **My Subscriptions:** Displays all the Subscription reports assigned to the selected user.

o **Add>:** When this button is clicked, the selected Subscription reports are added to the My Subscriptions table. A letter m is added between parenthesis reflecting that the user will receive the report in “My Reports” section of the PACE Advance Portal on the PACE Central Main Page.



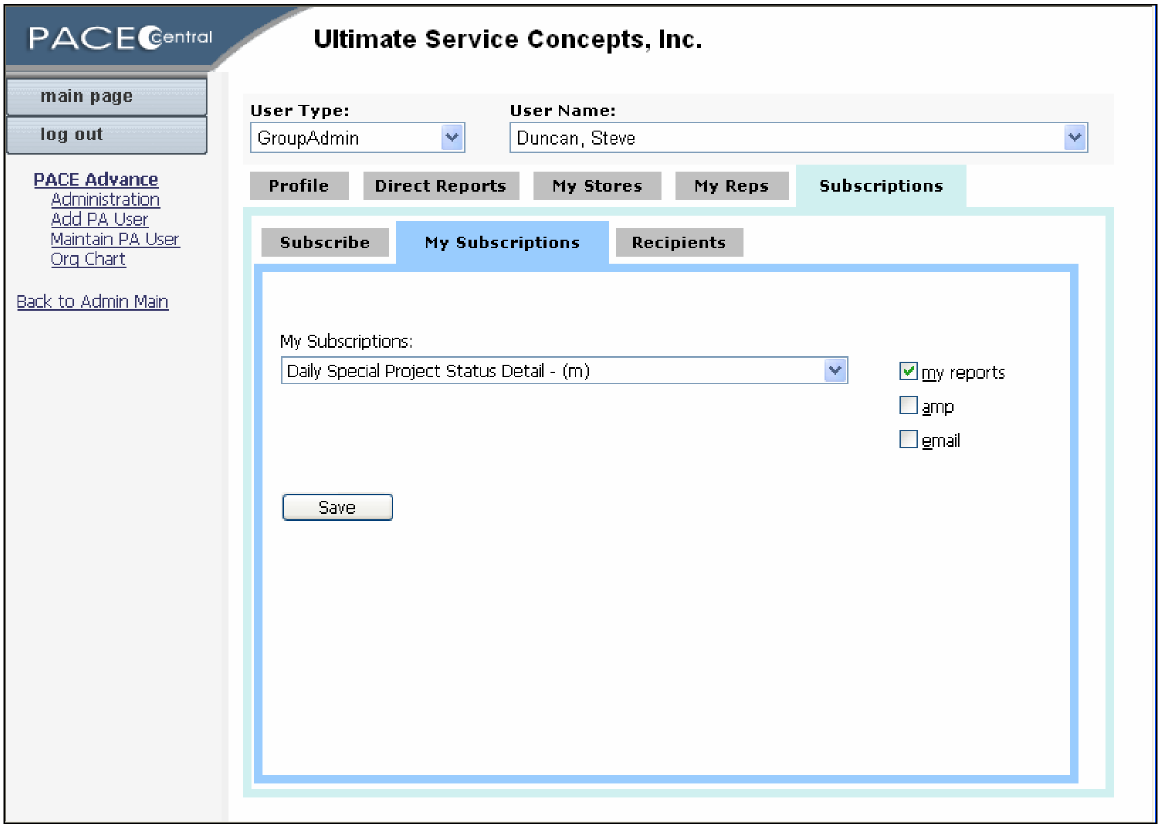
- o **<Remove:** When Remove is clicked, the selected Subscriptions are removed from My Subscriptions table to the Candidate Subscriptions table.

- **SAVE**: When this button is clicked, the Subscription data is saved and a message appears: "Save Successful."

My Subscriptions

This section allows user to designate the format in which Subscription reports are distributed to the selected user. Reports can be distributed in three ways: placed on the My Reports section of the PACE Advance Portal (accessible on the PACE Central Main Page), e-mailed directly to the user, or sent via AMP message to the user's PDA. When the **My Subscriptions** tab is selected, the My Subscriptions screen is loaded.

My Subscriptions screen



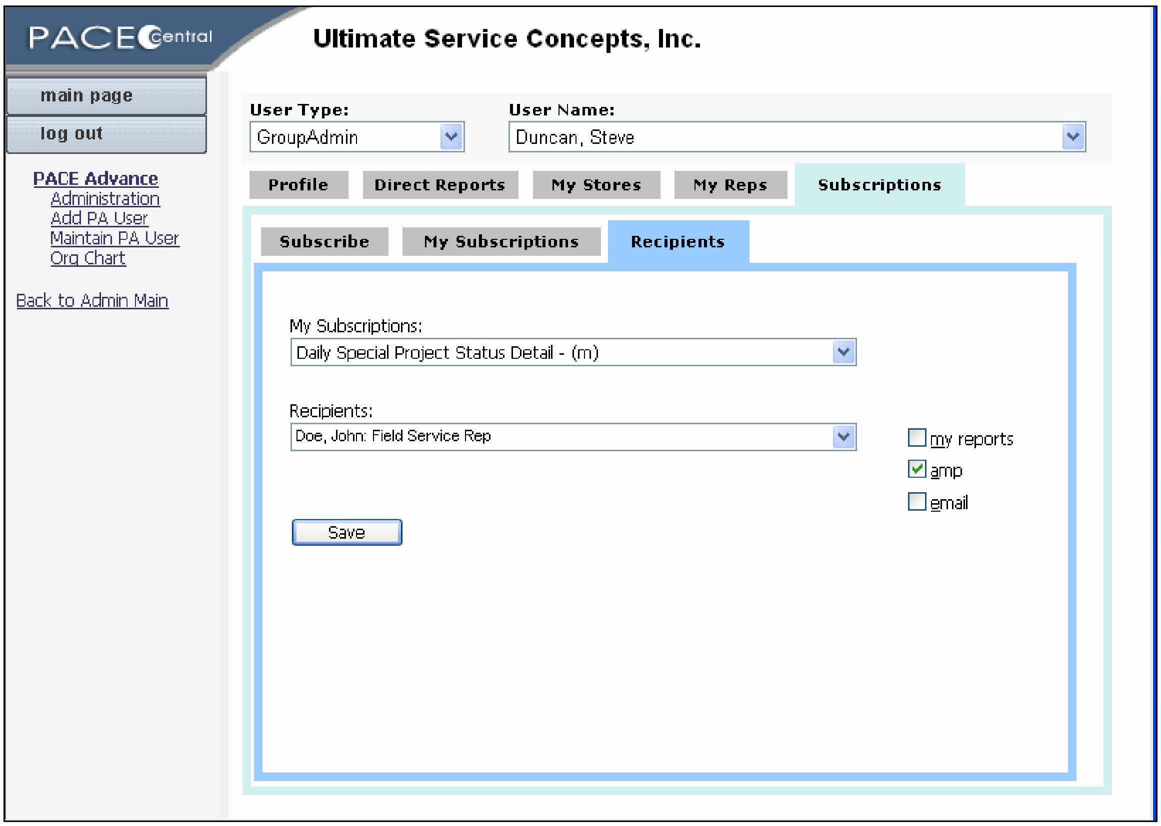
- **My Subscriptions:** is a drop down list that displays all Subscription reports assigned to the selected Rep. When a Subscription is selected, user can then indicate how the report will be delivered.
  - **my reports:** when this box is checked, user will receive reports on the My Reports section of the PACE Advance Portal. This is the default delivery option for this section.
  - **Amp:** when this box is checked, user will receive reports via AMP messaging on their PDA.
  - **Email:** when this box is checked, user will receive reports via the e-mail account indicated in their profile.

- **SAVE:** when this button is clicked, the delivery options are saved to user profile and a message appears: “Save Successful.”

Recipients

This section allows the user to select Subscription reports and designate them to be delivered to the user’s assigned Direct Reports or Reps. The reports are delivered to My Reports, AMP, or e-mail. When the **Recipients** tab is clicked, the Recipients screen is loaded.

Recipients screen



- **My Subscriptions:** is a drop down list that displays all the Subscription reports assigned to the user available for distribution to Reps.
- **Recipients:** is a drop down list that displays all the Reps assigned to the user that can receive Subscription reports. When a Subscription and a Recipient are selected, user can select distribution method.
  - **my reports:** when this box is checked, Recipient will receive reports on the My Reports section of the PACE Advance Portal.

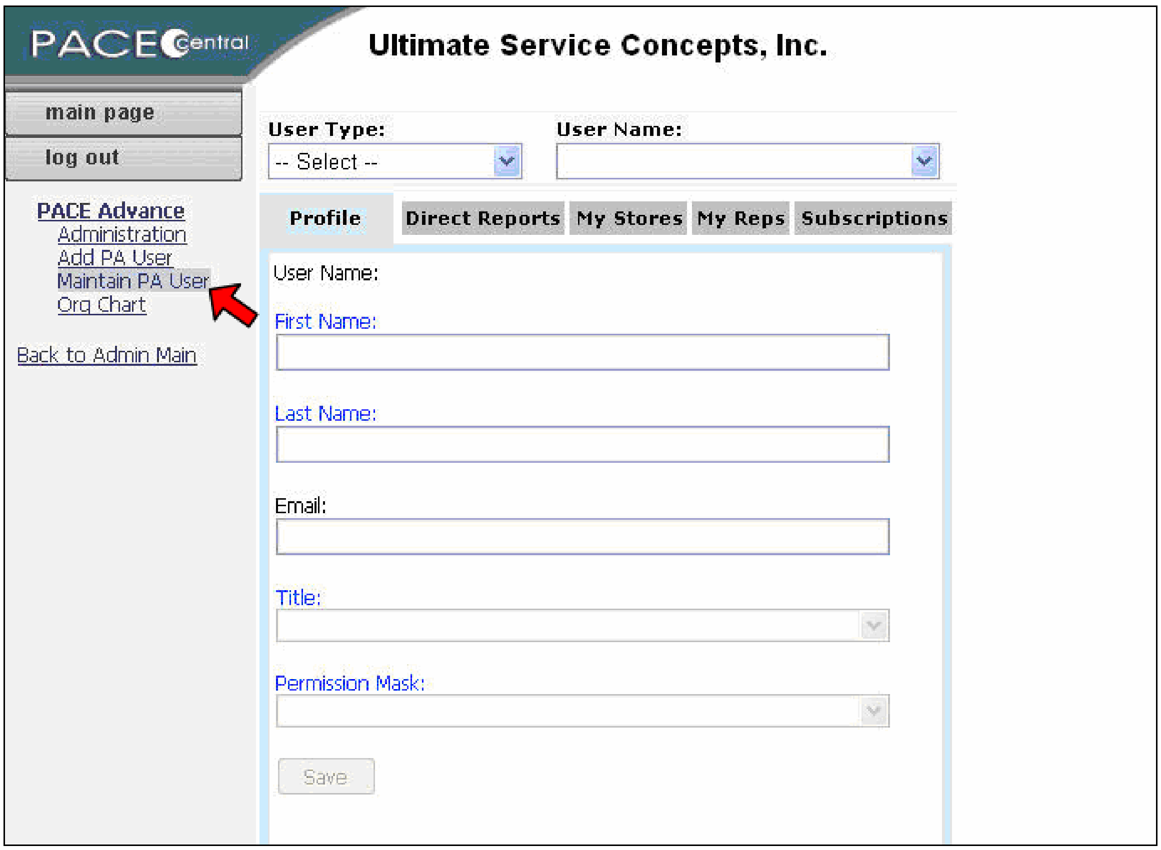
- Amp: when this box is checked, Recipient will receive reports via AMP messaging on their PDA. This is the default delivery option for this section.
- Email: when this box is checked, Recipient will receive reports via the e-mail account indicated in their profile.

- **SAVE:** when this button is clicked, the delivery options are saved to user profile and a message appears: "Save Successful."

Maintain PA User

This section allows user to edit existing PACE Advance - Online user profiles. When the **Maintain PA User tab** is clicked, the **Maintain PA User screen** is loaded.

Maintain PA User screen



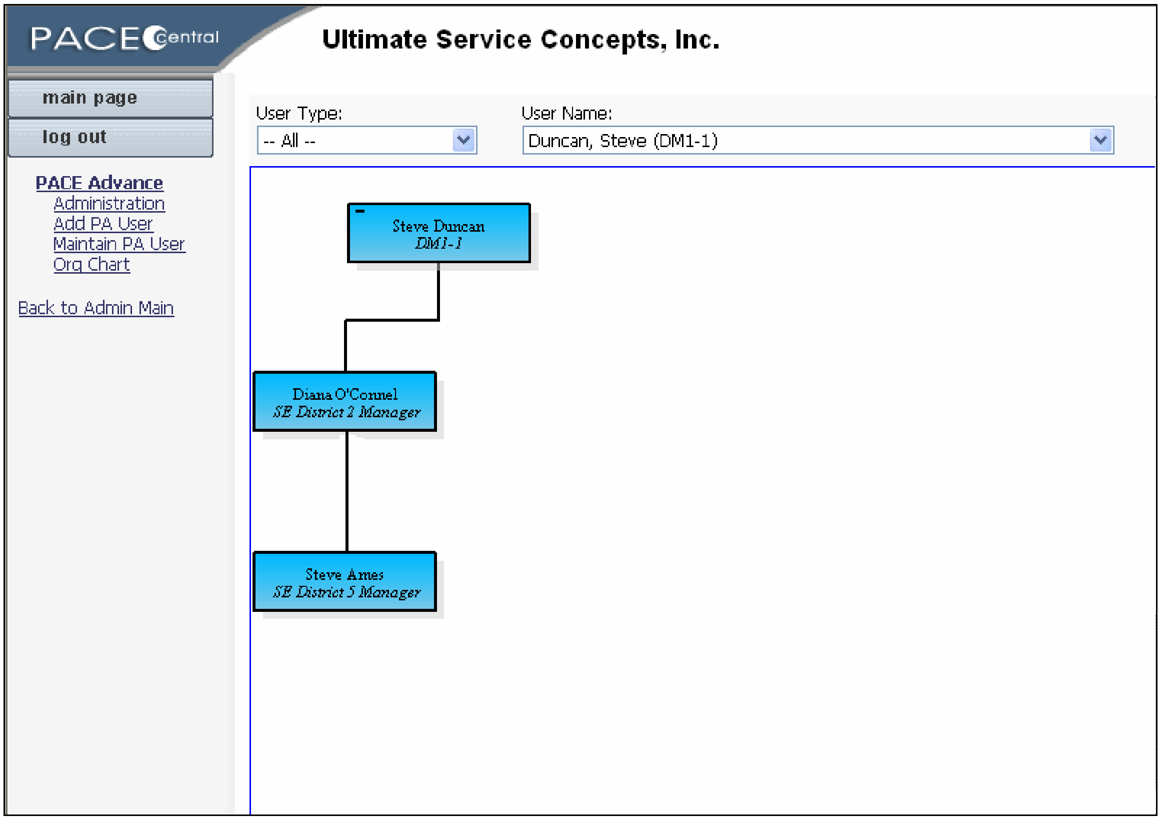
This page has same appearance and functionality as the **Add PA User** page, and allows edits and updates to existing PACE Advance - Online user profiles.

Org Chart

PACE Advance - Online allows users to obtain a visual representation of the organizational structure, Tiers, Group Admin Division Managers and Reps in a company.

When the **Org Chart** tab is clicked, the **Org Chart Screen** is loaded.

Org Chart Screen



- **User Type:** is a drop down list that loads the User Types available for PA user. (Group Admin and Division Manager).
- **User Name:** is a drop down list that loads all the user names according to the selection in the User type field.
    - When a user is selected, the Organization Chart for that user is loaded.