



Admin

# PACE Advance - Online User Guide

EnfoTrust Networks, Inc

May 12, 2006

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## 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*

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## 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?

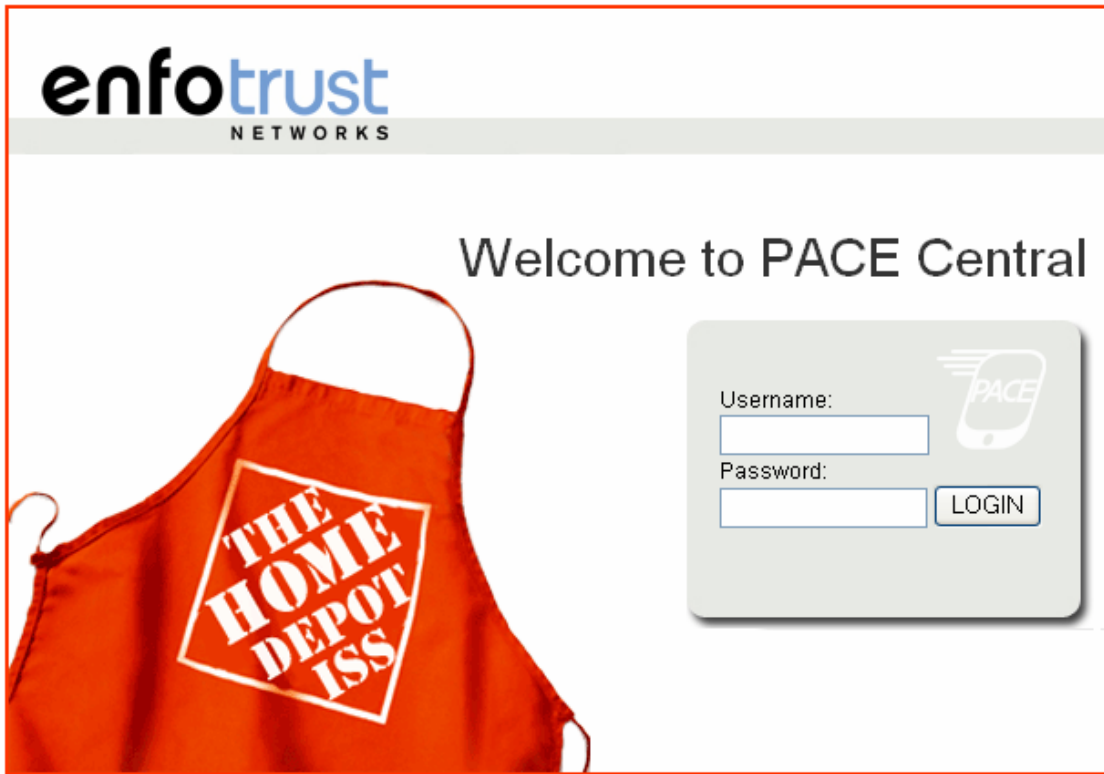
### *PACE Advance - Online portal features*

- 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



enfo**trust**  
NETWORKS

Welcome to PACE Central

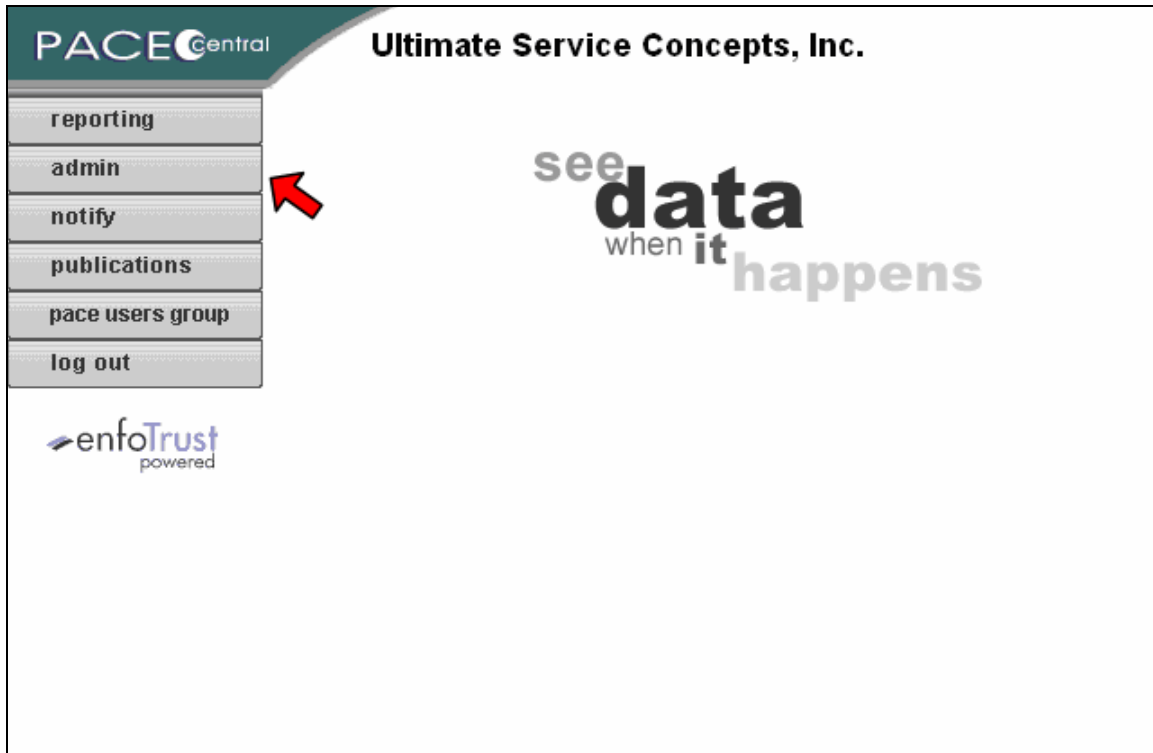
Username:

Password:

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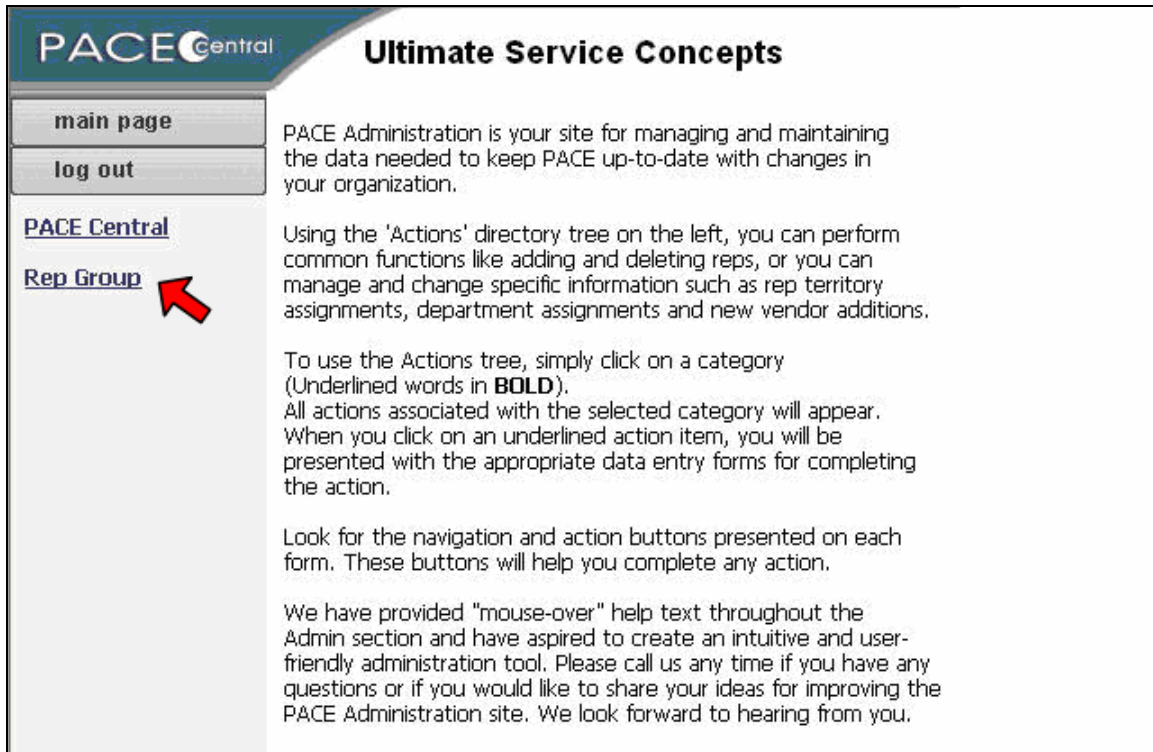
- Enter your assigned **USER NAME**.
- Enter your assigned **PASSWORD**.
- After clicking [**Log In**] the PACE Central main page will load.

## PACE Central Main Page



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

## Admin Page



The screenshot shows the PACE Central Admin Page. The header includes the PACE Central logo and the title "Ultimate Service Concepts". On the left, there is a navigation menu with "main page" and "log out" buttons, and a list of links: "PACE Central" and "Rep Group". A red arrow points to the "Rep Group" link. The main content area contains the following text:

PACE Administration is your site for managing and maintaining the data needed to keep PACE up-to-date with changes in your organization.

Using the 'Actions' directory tree on the left, you can perform common functions like adding and deleting reps, or you can manage and change specific information such as rep territory assignments, department assignments and new vendor additions.

To use the Actions tree, simply click on a category (Underlined words in **BOLD**).

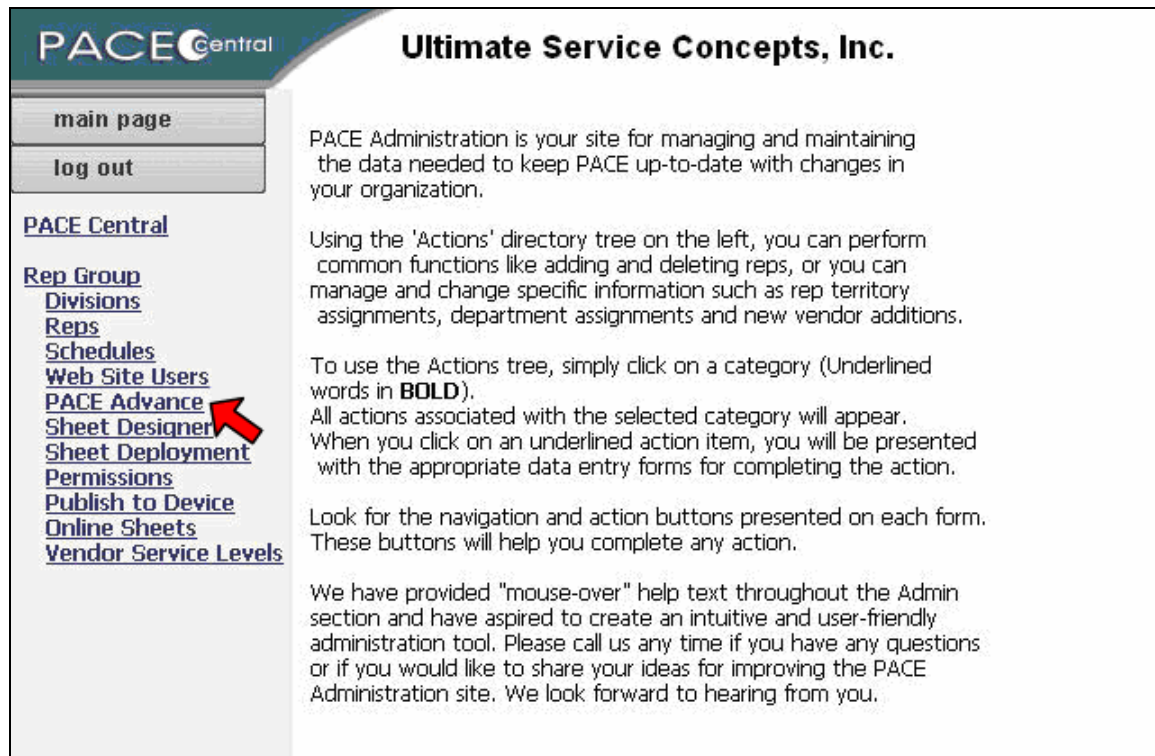
All actions associated with the selected category will appear. When you click on an underlined action item, you will be presented with the appropriate data entry forms for completing the action.

Look for the navigation and action buttons presented on each form. These buttons will help you complete any action.

We have provided "mouse-over" help text throughout the Admin section and have aspired to create an intuitive and user-friendly administration tool. Please call us any time if you have any questions or if you would like to share your ideas for improving the PACE Administration site. We look forward to hearing from you.

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

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



**PACE** Central

**Ultimate Service Concepts, Inc.**

main page

log out

**PACE Central**

**Rep Group**

- [Divisions](#)
- [Reps](#)
- [Schedules](#)
- [Web Site Users](#)
- [PACE Advance](#)
- [Sheet Designer](#)
- [Sheet Deployment](#)
- [Permissions](#)
- [Publish to Device](#)
- [Online Sheets](#)
- [Vendor Service Levels](#)

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- 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.

**PACE Central** Ultimate Service Concepts, Inc.

main page  
log out

**PACE Advance**  
Administration   
Add PA User  
Maintain PA User  
Display Organizational

[Back to Admin Main](#)

PACE Administration is your site for managing and maintaining the data needed to keep PACE up-to-date with changes in your organization.

Using the 'Actions' directory tree on the left, you can perform common functions like adding and deleting reps, or you can manage and change specific information such as rep territory assignments, department assignments and new vendor additions.

To use the Actions tree, simply click on a category (Underlined words in **BOLD**). All actions associated with the selected category will appear. When you click on an underlined action item, you will be presented with the appropriate data entry forms for completing the action.

Look for the navigation and action buttons presented on each form. These buttons will help you complete any action.

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## 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.

Administration Screen

**PACE**Central Ultimate Service Concepts, Inc.

main page  
log out

**PACE Advance**  
[Administration](#)  
[Add PA User](#)  
[Maintain PA User](#)  
[Org Chart](#)  
[Back to Admin Main](#)

**Attributes** Tiers Titles Cycles Sheet Cycles

Rep Group Attributes % Service by Sheet Type % Service by Class

Rep Group Attributes:

Attribute	Value
GAP Time Tolerance	<input type="text" value="5"/>
Max Tiers	<input type="text" value="6"/>
Standard Lunch Minutes	<input type="text" value="10"/>

SAVE RELOAD

**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.

**PACE Central** Ultimate Service Concepts, Inc.

main page  
log out

Attributes Tiers Titles Cycles Sheet Cycles

Rep Group Attributes % Service by Sheet Type % Service by Class

% Service by Sheet Type:

Sheet Type	Percentage
Action Plans	8
As-Built Planogram Scan	50
As-Is Planogram Scan	5
Assemble Display	5
Call Sheet	10
Cross-Merchandising	0
Display Building	5
DL	6
Down Stock	0
Driving Log	0
Events	0
Inventory	0
Labels	0

Total : 100 %

SAVE RELOAD

Back to Admin Main

- **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.

PACE Central  
Ultimate Service Concepts, Inc.

main page  
log out

Attributes Tiers Titles Cycles Sheet Cycles

Rep Group Attributes % Service by Sheet Type % Service by Class

% Service by Class:

Vendor Class	Percentage
ACCENT LIGHTING	10
AIR CIRCULATION/ACCES.	0
APPLIANCES	0
AUDIO/VIDEO	0
BATH ACCESSORIES	0
BATH FIXTURES	0
CEILING FAN ACCESSORIES	0
CEILING FANS	0
CIRCUIT PROTECT. DEVICESSSSS	0
CONDUIT/BOXES/FITTINGS	0
CONSUMER ELECTRONICS	0
COUNTER TOPS	0
DATA-COM	0

Total: 10 %

SAVE RELOAD

Back to Admin Main

- **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".

**PACE Advance**

- **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.
  - If the Tier Name is deleted, a message appears: "-Tier Name". Tier must have a name to continue.
  - 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.
  - If no tier is selected, a message appears: "Please Select Tier(s) to Delete".
  - If a tier with titles is selected, a message appears: "Unable to delete tiers with associated titles".
  - 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

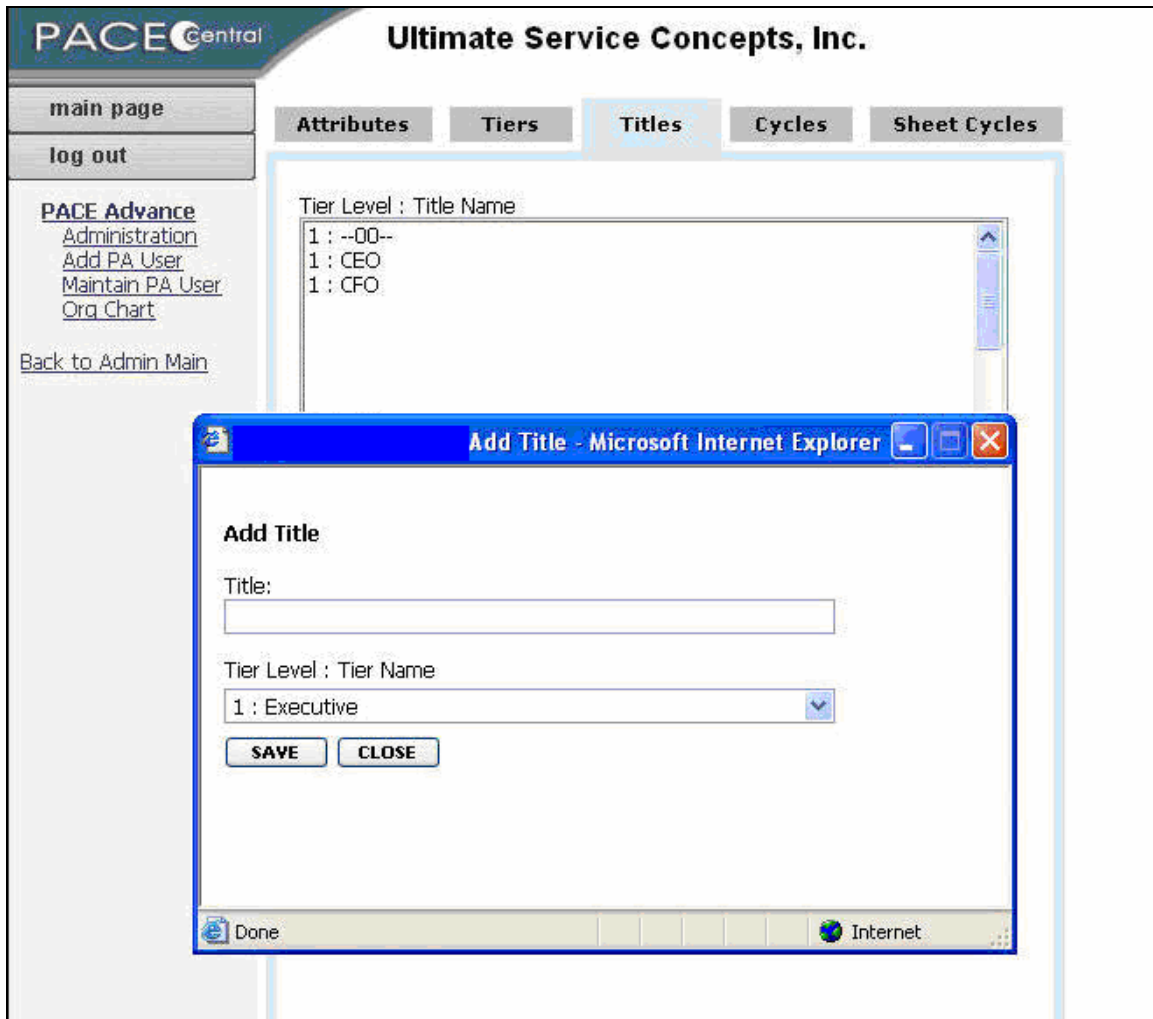
The screenshot shows the PACE Central interface for Ultimate Service Concepts, Inc. The left sidebar contains navigation links: 'main page', 'log out', and a 'PACE Advance' section with sub-links for 'Administration', 'Add PA User', 'Maintain PA User', and 'Org Chart'. A 'Back to Admin Main' link is also present. The main content area features a tabbed interface with 'Attributes', 'Tiers', 'Titles', 'Cycles', and 'Sheet Cycles'. The 'Titles' tab is selected, showing a table with the following data:

Tier Level	Title Name
1	--00--
1	CEO
1	CFO

Below the table are three buttons: 'ADD', 'EDIT', and 'DELETE'.

- **ADD:** When this button is clicked, the [Add Title Screen](#) is loaded.

## Add Title Screen

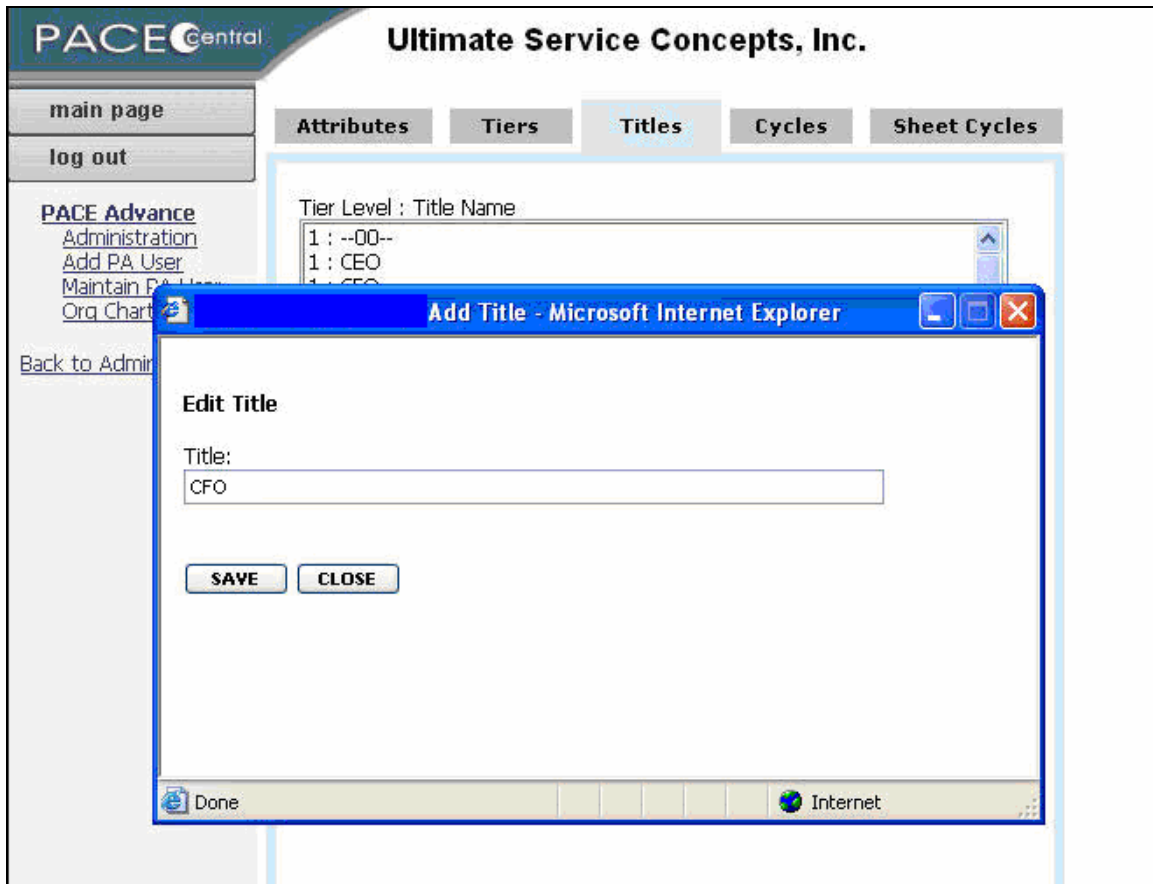


- **Title:** is a text field to insert the Title Name.
- **Tier Level:** is a drop down list that loads the Title Level.
- **SAVE:** Saves new Title into the system.
  - If no Title Name is inserted, a message appears: "-Title Name". You must enter a Name to add a new Title.
  - If all data is inserted,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

## PACE Advance

- **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.

**PACE Advance**

- **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

The screenshot shows the PACE Central interface for Ultimate Service Concepts, Inc. The left sidebar contains navigation links: 'main page', 'log out', and a 'PACE Advance' section with sub-links for 'Administration', 'Add PA User', 'Maintain PA User', and 'Org Chart', along with a 'Back to Admin Main' link. The main content area features a tabbed interface with 'Attributes', 'Tiers', 'Titles', 'Cycles', and 'Sheet Cycles'. The 'Cycles' tab is selected, showing a table with two columns: 'Cycle Type' and 'Cycle Name'. The table contains two entries: 'Division : aBC' and 'Division : divisioncycleReport'. Below the table are three buttons: 'Add', 'Edit', and 'Delete'.

- **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

The screenshot displays the 'Add Cycle' dialog box within a Microsoft Internet Explorer browser window. The dialog is titled 'Add/Edit Cycle - Microsoft Internet Explorer'. The background shows the PACE Central web application interface for 'Ultimate Service Concepts, Inc.', with a navigation menu on the left and tabs for 'Attributes', 'Tiers', 'Titles', 'Cycles', and 'Sheet Cycles'. The 'Cycles' tab is active, showing a form with the following fields:

- Cycle Type : Cycle Name
- Division : aBC
- Division : divisioncycleReport

The 'Add Cycle' dialog box contains the following fields and controls:

- Cycle Name :
- Cycle Type :  (dropdown menu)
- Start Date :  (with a 'pick date' button)
- Days in cycle :
- Frequency :
- Recurring :
- Due Date :  (with a 'pick date' button)
- Buttons: Save, Close

The browser window title bar shows 'Add/Edit Cycle - Microsoft Internet Explorer'. The status bar at the bottom indicates 'Done' and 'Internet'.

- **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.

**PACE Advance**

- **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**

The screenshot displays the PACE Advance web application interface. At the top, the logo 'PACE Central' and the company name 'Ultimate Service Concepts, Inc.' are visible. The navigation menu includes 'main page' and 'log out'. A sidebar on the left contains links for 'PACE Advance Administration', 'Add PA User', 'Maintain PA User', 'Org Chart', and 'Back to Admin Main'. The main content area features tabs for 'Attributes', 'Tiers', 'Titles', 'Cycles', and 'Sheet Cycles'. The 'Cycles' tab is active, showing a list of cycle entries: 'Cycle Type : Cycle Name', 'Division : Bi-weekly', 'Division : Daily', and 'Division : elie's cycles'. An 'Add/Edit Cycle' dialog box is open, containing the following fields: 'Cycle Name' (text input with 'Bi-weekly'), 'Cycle Type' (dropdown menu with 'Division'), 'Start Date' (calendar icon and text input with '04/16/2006'), 'Days in cycle' (text input with '14'), 'Frequency' (text input with '1'), and 'Recurring' (checkbox). 'SAVE' and 'CLOSE' buttons are at the bottom of the dialog. The browser window title is 'https://www.thd-issi.com - Add/Edit Cycle - Microsoft Internet ...'.

- **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

**PACE Central** Ultimate Service Concepts, Inc.

main page  
log out

**PACE Advance**  
[Administration](#)  
[Add PA User](#)  
[Maintain PA User](#)  
[Org Chart](#)  
[Back to Admin Main](#)

Attributes Tiers Titles Cycles **Sheet Cycles**

Cycle Type : Cycle Name  
y div - Administration - 12121 - Action sheet test

Cycle Type	Start Date	Days in Cycle	Frequency	Recurring
<b>Division</b>	<b>03/24/2006</b>	<b>501</b>	<b>501</b>	<b>Yes</b>

RepGroup Division - Department - Vendor - Sheet :

- Training - Training - Dot Net Test
- y div - Administration - 12121 - 16-08-2005 sheet + dynamic question
- y div - Administration - 12121 - Action sheet test
- y div - Administration - 12121 - Action sheet test
- y div - Administration - 12121 - Action sheet test dynamic
- wst div - Administration - v test - s-events-test
- wst div - Administration - v test - s-inventory-test
- wst div - Administration - v test - s-labels-test
- wst div - Administration - v test - s-maintenance-test
- wst div - Administration - v test - s-management-test

Add Delete

- **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 : [27E: TST\(Southeast\)](#)

Departments : [Administration](#)

Vendors : [Agent Evaluation](#)

Sheet Types : [Call Sheet](#)

Rep Group Division - Department - Vendor - Sheet Type - Sheet :

Rep Group	Division	Department	Vendor	Sheet Type	Sheet
27E: TST(Southeast)	Administration	Agent Evaluation	Call Sheet	Agent Evaluation	

- **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."

**PACE Advance**

- **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

The screenshot displays the PACE Central interface for 'Ultimate Service Concepts, Inc.'. On the left, a navigation menu includes 'main page', 'log out', and 'PACE Advance' sub-menu items: 'Administration', 'Add PA User' (highlighted with a red arrow), 'Maintain PA User', and 'Org Chart'. Below the menu is a 'Back to Admin Main' link. The main content area features a header with the company name and a set of tabs: 'Profile', 'Direct Reports', 'My Stores', 'My Reps', and 'Subscriptions'. The 'Profile' tab is selected, revealing a form with the following fields: 'User Name:' (a dropdown menu currently showing '-- Select --'), 'First Name:', 'Last Name:', 'Email:', 'Title:' (a dropdown menu), and 'Permission Mask:' (a dropdown menu). A 'Save' button is located at the bottom of the form.

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

**Add PA User**

**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*

The screenshot shows the PACE Central interface for 'Ultimate Service Concepts, Inc.'. On the left is a navigation menu with 'main page' and 'log out' buttons, and a list of links under 'PACE Advance': 'Administration', 'Add PA User', 'Maintain PA User', and 'Org Chart'. Below these is a 'Back to Admin Main' link. The main content area has a header with the company name and two dropdown menus: 'User Type' (set to 'GroupAdmin') and 'User Name' (set to 'Duncan, Steve'). Below this are five tabs: 'Profile' (selected), 'Direct Reports', 'My Stores', 'My Reps', and 'Subscriptions'. The 'Profile' tab shows the user's name as 'Steve\_Duncan11991' and several input fields: 'First Name' (Steve), 'Last Name' (Duncan), 'Email' (empty), 'Title' (District : DM1-1), and 'Permission Mask' (Default PA Permission Mask). A 'Save' button is at the bottom.

- **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

The screenshot shows the PACE Central interface for Ultimate Service Concepts, Inc. The page has a left sidebar with navigation links: 'main page', 'log out', 'PACE Advance Administration', 'Add PA User', 'Maintain PA User', 'Org Chart', and 'Back to Admin Main'. The main content area has a header with the company name and a navigation bar with tabs: 'Profile', 'Direct Reports' (selected), 'My Stores', 'My Reps', and 'Subscriptions'. Below the tabs, there are two dropdown menus: 'User Type' (set to 'GroupAdmin') and 'User Name' (set to 'Duncan, Steve'). The main area is divided into two columns: 'Candidate Direct Reports' and 'My Direct Reports'. The 'Candidate Direct Reports' column contains a list of three entries: 'Doe, John: Field Service Rep', 'Doe, Jane: Field Service Rep', and 'James, Frank: DM-1'. Below this list are 'Add >' and '< Remove' buttons. The 'My Direct Reports' column is currently empty. A 'Save' button is located at the bottom of the main content area.

- **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.

## Add PA User

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

The screenshot shows the PACE Central administration interface for Ultimate Service Concepts, Inc. The interface is divided into a left sidebar and a main content area. The sidebar contains navigation links: 'main page', 'log out', 'PACE Advance Administration', 'Add PA User', 'Maintain PA User', 'Org Chart', and 'Back to Admin Main'. The main content area has a header with the company name and a navigation bar with tabs: 'Profile', 'Direct Reports', 'My Stores', 'My Reps', and 'Subscriptions'. The 'Direct Reports' tab is selected. Below the navigation bar, there are two dropdown menus: 'User Type' (set to 'GroupAdmin') and 'User Name' (set to 'Duncan, Steve'). The main content area is divided into two sections: 'Candidate Direct Reports' and 'My Direct Reports'. The 'Candidate Direct Reports' section contains a list of three entries: 'Doe, John: Field Service Rep', 'Doe, Jane: Field Service Rep', and 'James, Frank: DM-1'. The 'My Direct Reports' section contains one entry: 'James, Frank: DM-1'. Between the two sections are two buttons: 'Add >' and '< Remove'. A red arrow points to the 'Add >' button. At the bottom of the main content area is a 'Save' button.

- **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

The screenshot shows the PACE Central interface for 'Ultimate Service Concepts, Inc.'. The user is logged in as 'Steve Duncan' with the user type 'GroupAdmin'. The 'My Stores' tab is selected, showing a list of 'Candidate Stores' on the left and an empty 'My Stores' list on the right. The candidate stores list includes items like '-20 : dido store', '1 : SOUTHEAST BYO', '6 : EXPO BYO', '11 : SOUTHWEST BYO', '100 : yy', '105 : DULUTH', '106 : KENNESAW', '108 : ROSWELL', '110 : LILBURN', '111 : MERCHANTS WALK', '112 : AUSTELL', '114 : MORROW', '115 : TILLY MILL', '116 : WOODSTOCK', '117 : WAGES DRIVE', '118 : WESLEY CHAPEL', '119 : AUGUSTA', '121 : CUMBERLAND', '122 : SAVANNAH', '123 : JONESBORO', and '124 : BUCKHEAD'. There are 'Add >' and '< Remove' buttons between the lists, and a 'Save' button at the bottom.

- **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.

**PACE** Central **Ultimate Service Concepts, Inc.**

[main page](#) [log out](#)

**PACE Advance**  
[Administration](#)  
[Add PA User](#)  
[Maintain PA User](#)  
[Org Chart](#)  
[Back to Admin Main](#)

**User Type:** GroupAdmin **User Name:** Duncan, Steve

**Profile** **Direct Reports** **My Stores** **My Reps** **Subscriptions**

**Candidate Stores:**

- 20 : dido store
- 1 : SOUTHEAST BYO
- 6 : EXPO BYO
- 11 : SOUTHWEST BYO
- 100 : yy
- 105 : DULUTH
- 106 : KENNESAW
- 108 : ROSWELL
- 114 : MORROW
- 115 : TILLY MILL
- 116 : WOODSTOCK
- 117 : WAGES DRIVE
- 118 : WESLEY CHAPEL
- 119 : AUGUSTA
- 121 : CUMBERLAND
- 122 : SAVANNAH
- 123 : JONESBORO
- 124 : BUCKHEAD
- 125 : EXPO ATLANTA - PER
- 126 : LAWRENCEVILLE
- 127 : FAYETTEVILLE, GA

**My Stores:**

- 110 : LILBURN
- 111 : MERCHANTS WALK
- 112 : AUSTELL

- **<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

The screenshot shows the PACE Central interface for Ultimate Service Concepts, Inc. The left sidebar contains navigation links: 'main page', 'log out', 'PACE Advance Administration', 'Add PA User', 'Maintain PA User', 'Org Chart', and 'Back to Admin Main'. The main content area has tabs for 'Profile', 'Direct Reports', 'My Stores', 'My Reps', and 'Subscriptions'. The 'My Reps' tab is selected. At the top, there are fields for 'User Type' (GroupAdmin) and 'User Name' (Duncan, Steve). Below the tabs, there are two columns: 'Candidate Reps' and 'My Reps'. The 'Candidate Reps' column contains a list of two entries: 'Doe, John: Field Service Rep' and 'Doe, Jane: Field Service Rep'. Below this list are 'Add >' and '< Remove' buttons. The 'My Reps' column is currently empty. A 'Save' button is located at the bottom of the main content area.

- **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.

The screenshot displays the 'Add PA User' interface for 'Ultimate Service Concepts, Inc.' within the PACE Central system. The interface includes a sidebar with navigation options like 'main page', 'log out', and 'PACE Advance Administration'. The main area features a 'User Type' dropdown set to 'GroupAdmin' and a 'User Name' dropdown set to 'Duncan, Steve'. Below these are tabs for 'Profile', 'Direct Reports', 'My Stores', 'My Reps', and 'Subscriptions'. The 'My Reps' tab is selected, showing a 'Candidate Reps' list with 'Doe, John: Field Service Rep' and 'Doe, Jane: Field Service Rep'. A 'My Reps' list currently contains 'Doe, John: Field Service Rep'. Between the lists are 'Add >' and '< Remove' buttons, with a red arrow pointing to the 'Add >' button. A 'Save' button is located at the bottom of the main content area.

- **<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

The screenshot displays the PACE Central interface for Ultimate Service Concepts, Inc. The top navigation bar includes 'main page' and 'log out'. The left sidebar contains 'PACE Advance Administration' links: 'Administration', 'Add PA User', 'Maintain PA User', and 'Org Chart', along with a 'Back to Admin Main' link. The main content area features a 'User Type' dropdown set to 'GroupAdmin' and a 'User Name' dropdown set to 'Duncan, Steve'. Below these are tabs for 'Profile', 'Direct Reports', 'My Stores', 'My Reps', and 'Subscriptions'. The 'Subscriptions' tab is active, showing sub-tabs for 'Subscriptions', 'My Subscriptions', and 'Recipients'. The 'Subscriptions' sub-tab is selected, displaying a list of 'Candidate Subscriptions' on the left and an empty 'My Subscriptions' box on the right. Between the boxes are 'Add >' and '< Remove' buttons. A 'Save' button is located at the bottom left of the candidate list.

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


**Ultimate Service Concepts, Inc.**

main page  
 log out

[PACE Advance Administration](#)  
[Add PA User](#)  
[Maintain PA User](#)  
[Org Chart](#)

[Back to Admin Main](#)

**User Type:** GroupAdmin    **User Name:** Duncan, Steve

Profile    Direct Reports    My Stores    My Reps    Subscriptions

Subscriptions    My Subscriptions    Recipients

**Candidate Subscriptions:**  
 Daily Cycle Status Detail  
 Daily MAP Status Detail  
 Daily Special Project Status Detail  
 FSR Daily Compliance Detail  
 FSR Daily Compliance Summary  
 FSR Monthly Compliance Detail  
 FSR Monthly Compliance Summary  
 FSR Weekly Compliance Detail  
 FSR Weekly Compliance Summary  
 MGR FSR Daily Compliance Detail  
 MGR FSR Daily Compliance Summary  
 MGR FSR Monthly Compliance Detail  
 MGR FSR Monthly Compliance  
 MGR FSR Weekly Compliance  
 MGR FSR Weekly Compliance

**My Subscriptions:**  
 Daily % Service By Class - (m)  
 Daily Cycle Status Detail - (m)

Add >    < Remove

Save

- **<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

The screenshot shows the 'My Subscriptions' screen. At the top, it says 'PACE Central' and 'Ultimate Service Concepts, Inc.'. Below that, there are fields for 'User Type' (GroupAdmin) and 'User Name' (Duncan, Steve). There are tabs for 'Profile', 'Direct Reports', 'My Stores', 'My Reps', and 'Subscriptions'. Under 'Subscriptions', there are sub-tabs for 'Subscribe', 'My Subscriptions', and 'Recipients'. The 'My Subscriptions' sub-tab is active. It contains a dropdown menu labeled 'My Subscriptions:' with the selected option 'Daily Special Project Status Detail - (m)'. To the right of the dropdown are three checkboxes: 'my reports' (checked), 'amp', and 'email'. Below these is a 'Save' button.

- **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.

**Add PA User**

- **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**

The screenshot displays the PACE Central interface for Ultimate Service Concepts, Inc. The left sidebar contains navigation links: 'main page', 'log out', 'PACE Advance Administration', 'Add PA User', 'Maintain PA User', 'Org Chart', and 'Back to Admin Main'. The main content area features a top navigation bar with 'Profile', 'Direct Reports', 'My Stores', 'My Reps', and 'Subscriptions'. Below this, a sub-navigation bar includes 'Subscribe', 'My Subscriptions', and 'Recipients'. The 'Recipients' sub-tab is selected, revealing a form with the following elements:

- User Type:** GroupAdmin (dropdown)
- User Name:** Duncan, Steve (dropdown)
- My Subscriptions:** Daily Special Project Status Detail - (m) (dropdown)
- Recipients:** Doe, John: Field Service Rep (dropdown)
- Distribution Method:**
  - my reports
  - amp
  - email
- Save** button

- **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.

**Add PA User**

- **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**

The screenshot shows the PACE Central interface for Ultimate Service Concepts, Inc. The left sidebar contains navigation links: 'main page', 'log out', 'PACE Advance', 'Administration', 'Add PA User', 'Maintain PA User' (highlighted with a red arrow), 'Org Chart', and 'Back to Admin Main'. The main content area features a header with the company name and a set of tabs: 'Profile', 'Direct Reports', 'My Stores', 'My Reps', and 'Subscriptions'. The 'Profile' tab is selected, showing a form with the following fields: 'User Name:' (a dropdown menu currently showing '-- Select --'), 'First Name:', 'Last Name:', 'Email:', 'Title:' (a dropdown menu), and 'Permission Mask:' (a dropdown menu). A 'Save' button is located at the bottom of the form.

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

The screenshot displays the PACE Central interface for Ultimate Service Concepts, Inc. The left sidebar contains navigation links: "main page", "log out", "PACE Advance", "Administration", "Add PA User", "Maintain PA User", "Org Chart", and "Back to Admin Main". The main content area features two dropdown menus: "User Type:" set to "-- All --" and "User Name:" set to "Duncan, Steve (DM1-1)". Below these is an organization chart showing a hierarchy: Steve Duncan (DM1-1) at the top, connected to Diana O'Connell (SE District 2 Manager), who is connected to Steve Ames (SE District 5 Manager).

```
graph TD; SteveDuncan["Steve Duncan  
DM1-1"] --- DianaOConnell["Diana O'Connell  
SE District 2 Manager"]; DianaOConnell --- SteveAmes["Steve Ames  
SE District 5 Manager"];
```

- **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.