USER'S MANUAL
FOR COMPANY ADMIN

UnitX Pro

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December, 2016

Revision Sheet

Release No.	Date	Revision Description
Rev. 0		User’s Manual Created

Table of Contents

1.0 GENERAL INFORMATION

1.1 System Overview

Planet UMS is an application that details the various functions, processes and systems that make the unit work; including proactive management of contingencies. Users with different roles and responsibilities can manage people and tasks done within a unit more efficiently.

Features

- **INTEGRATED SYSTEM: COUPLING BETWEEN VARIOUS MODULES:**
  - To ensure various internal modules are in sync and have data integrity, organized together all in one place.
  - Process efficiency across organization.
  - Dramatically improved visibility.
  - Reduction in operational costs, as different systems will not be required to be maintained.
  - Accelerated Growth – Business expansion to multiple locations / additional sales channels will become easier to adopt.

- **WEB-BASED PLATFORM**
  - Platform will be primarily web-based so that it is available on Internet and can be easily accessed. It can also have mobile-friendly version.
  - Easily accessible anytime, anywhere.
  - Can be accessible from a range of devices.
  - Improved inter-operability (between systems).
  - Easier installation and maintenance.
  - Easier to grow as you grow.
  - Security controls are easier to adopt with this technology.

- **RICH USER INTERFACE**
  - Easy-to-use, responsive and quick interface for the users to give them enhanced experience in terms of usage of the platform.

- **CONFIGURABLE ACCESS CONTROLS AND WORKFLOWS**
  - To ensure authorized access to various modules of the platform as per the roles and privileges.
  -
- **MODULAR ARCHITECTURE**
  - Platform architecture will be modular so that the future enhancements can be made easily and without affecting existing workflows. This will also ensure easy maintenance of the system.

2.0 GETTING STARTED

2.1 Setup

- **Step 1** - Once super admin (Planet NEXTGen Technologies) has created the company profile, the Company Admin user is created and a system generated mail is sent detailing the steps to log-in into tie system.
- **Step 2** – Open web browser (preferably Chrome) and enter the following address https://system.planetcp.com/PCP/WWW/login.html .

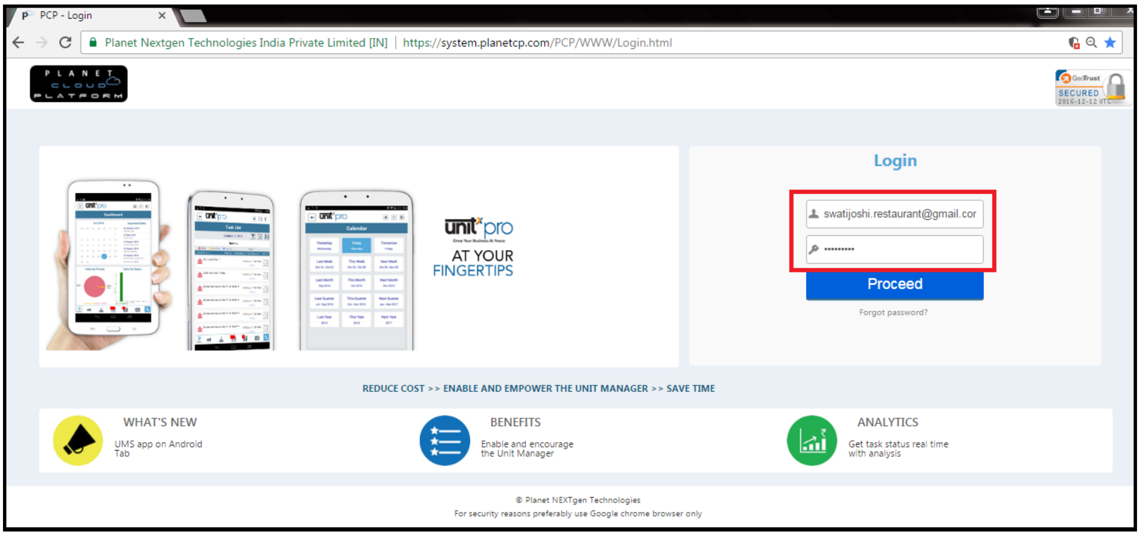
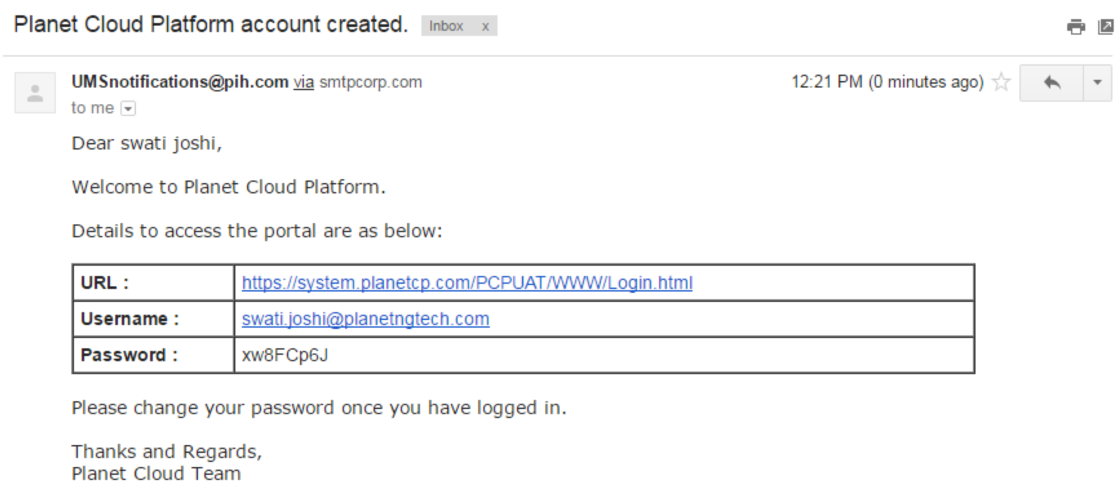


Figure 2-1

- **Step 3** – In a new tab, open the mail client for the e-mail address provided and check for the system generated mail which should appear as the one shown below.


Planet Cloud Platform account created. Inbox x

UMSnotifications@pih.com via smtpcorp.com 12:21 PM (0 minutes ago)
to me

Dear swati joshi,

Welcome to Planet Cloud Platform.

Details to access the portal are as below:

URL :	https://system.planetcp.com/PCPUAT/WWW/Login.html
Username :	swati.joshi@planetngtech.com
Password :	xw8FCp6J

Please change your password once you have logged in.

Thanks and Regards,
Planet Cloud Team

Figure 2-2

- **Step 4** – Go back to the UnitX Pro Login page from **Step 2**, enter the username and password from the email received in **Step 3**. Click ‘Proceed’ to continue.

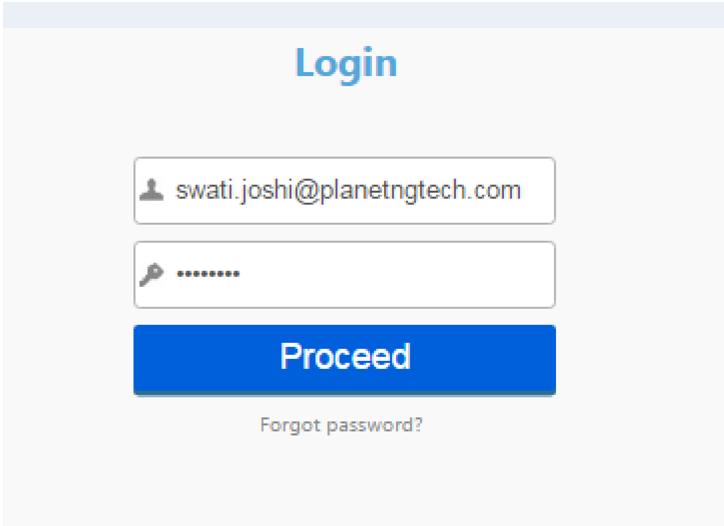


Figure 2-3

- **Step 5** – Once you click on 'Proceed', the system will ask to change your password and set 2 additional security questions. (Note: Set the security questions and answers carefully as these are needed to log into the system every time as shown in **Figure 2.4**)

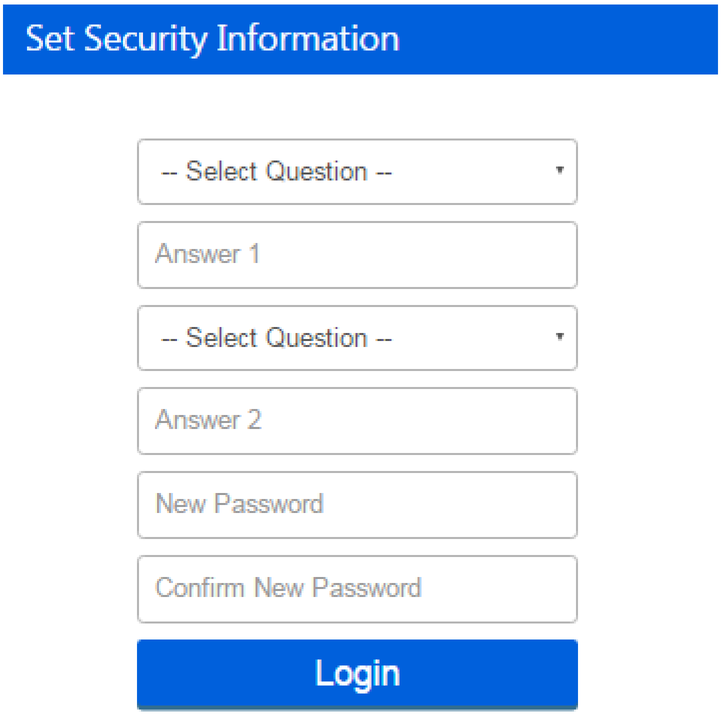


Figure 2-4

- **Step 6** – Once **Step 5** is complete, the Company Admin dashboard will be visible as shown below.

3.0 ROLES

- **Description**

Roles are assigned to various different users of the UnitX Pro system to illustrate the different functions accessible. Each Role will have a different Dashboard interface and set of options. The default Roles created when a new company is made are:

- Company Admin
- Help Desk Admin
- Help Desk Agent HR
- Help Desk Agent Procurement
- Help Desk Agent Operation
- Unit Owner

- **Features**
  - Roles can be created by the Company Admin only.
  - A Role can be named any appropriate name and given access to select features of the system by the Company Admin.
  - Only newly created Roles can be edited.
  - Roles can be given access to selected Modules depending on designation.
  - List of Roles can be exported to Excel and PDF files.

- **Drawbacks**

  - Roles created cannot be deleted, they can only be deactivated.
  - Default system Roles cannot be deleted or edited

3.1 How to create a Role

- **Step 1**- Click on **Roles**.

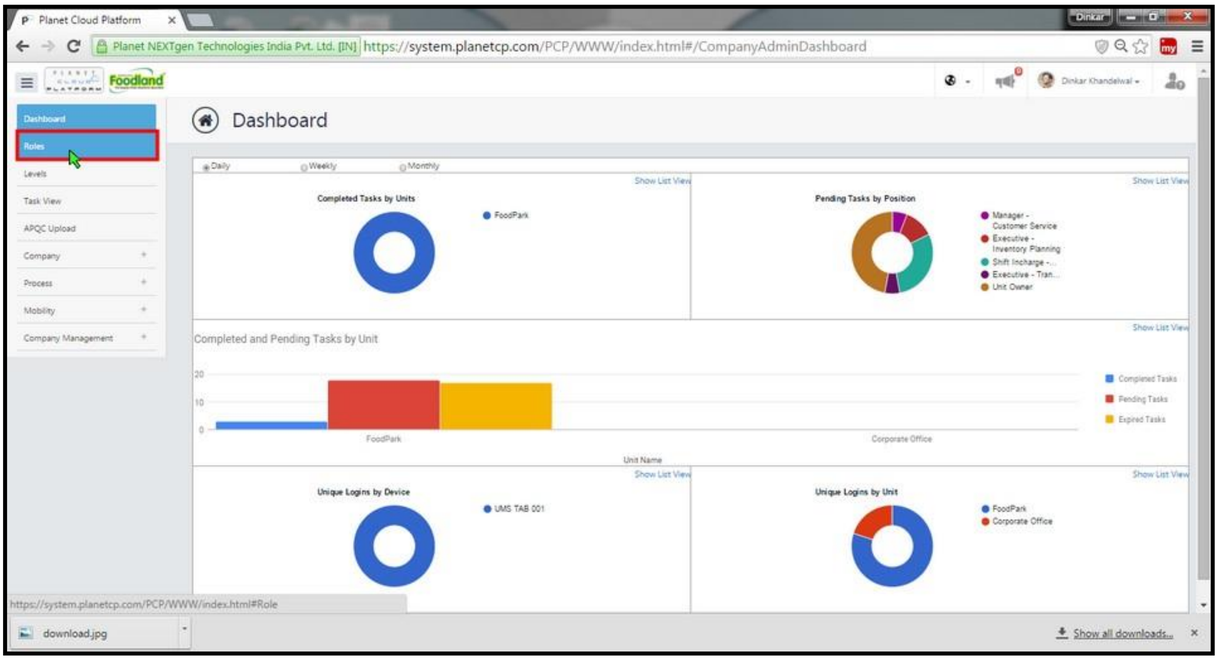


Figure 3-1

- **Step 2-** Click on **Add Role.**

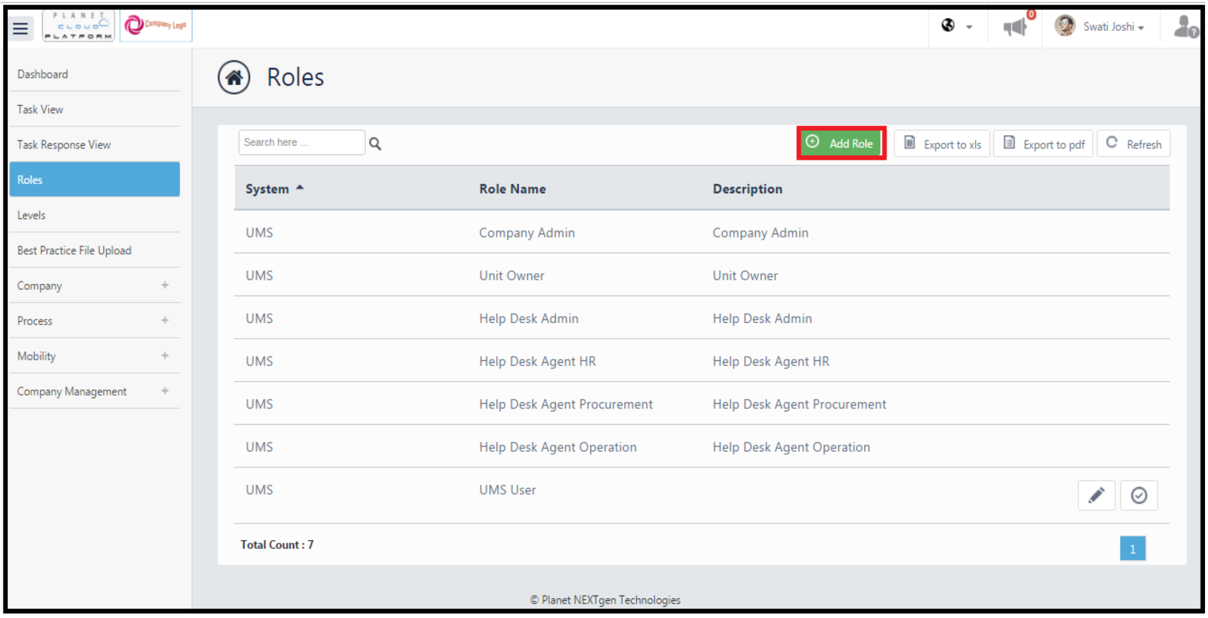


Figure 3-2

- **Step 3-** In the **Name** field, enter the desired Name. For e.g., enter "**Unit Owner**". In the **Description** field, enter the desired Description. Select the desired **System** from the list. For e.g., select "**UMS"**

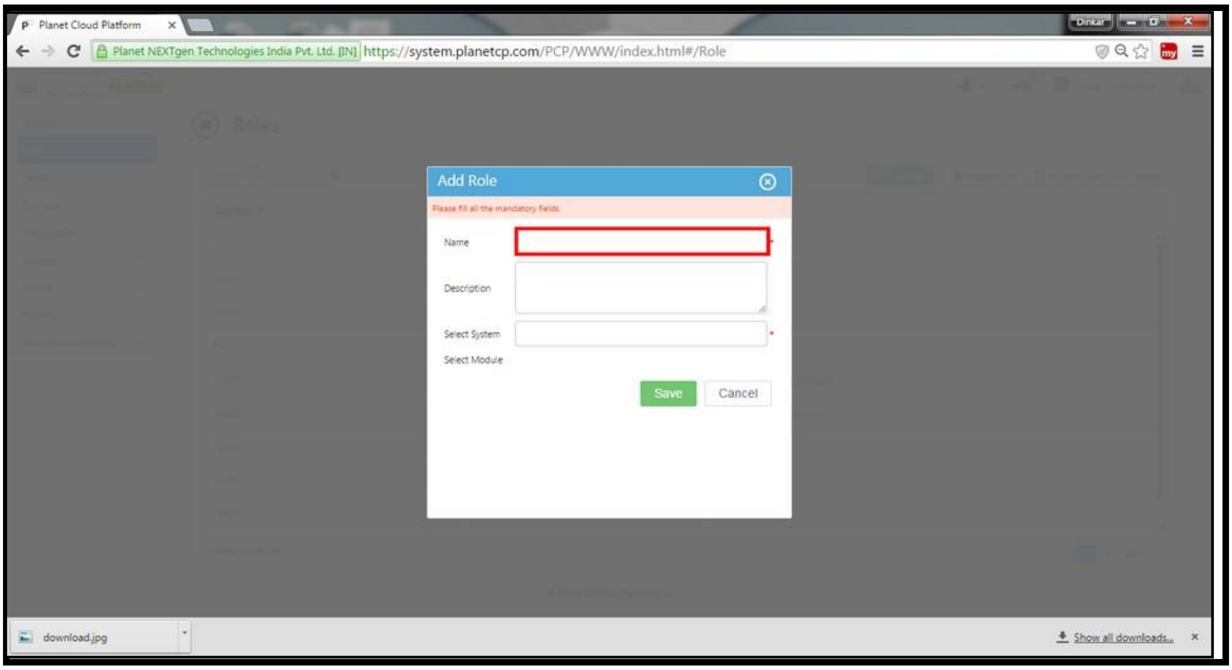


Figure 3-3

- **Step 4-** Select appropriate Module where the user will have access to. For e.g., select Task view, Task Response view, Requests and Dashboard for Unit owner.

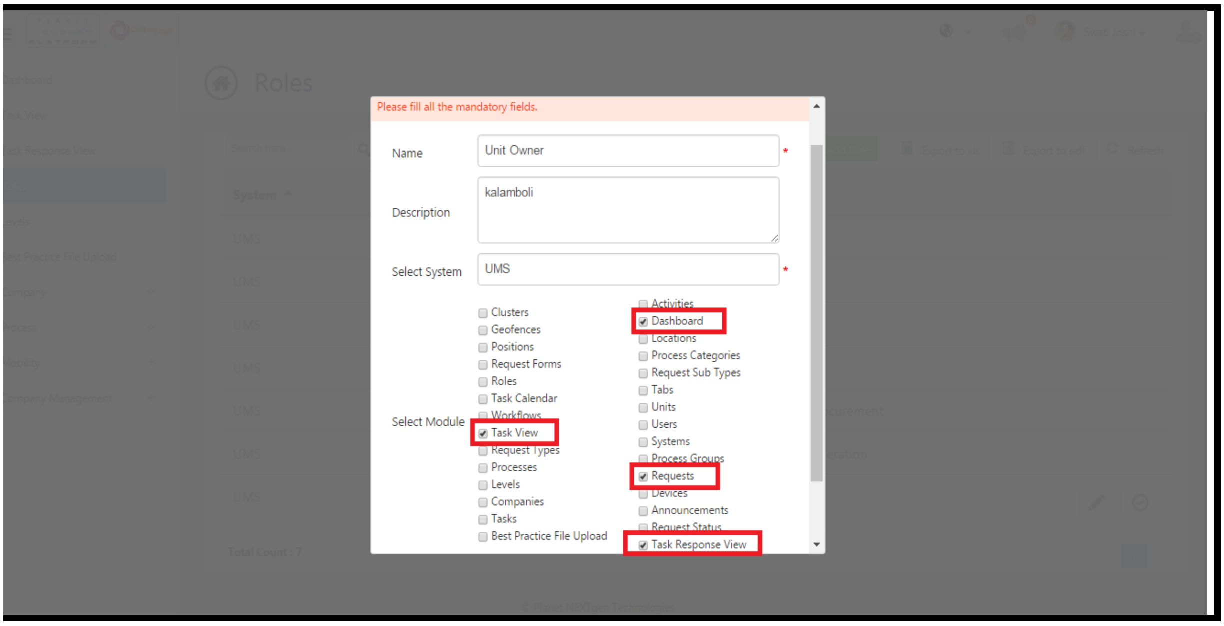


Figure 3-4

- **Step 5-** Click on **Save** button.

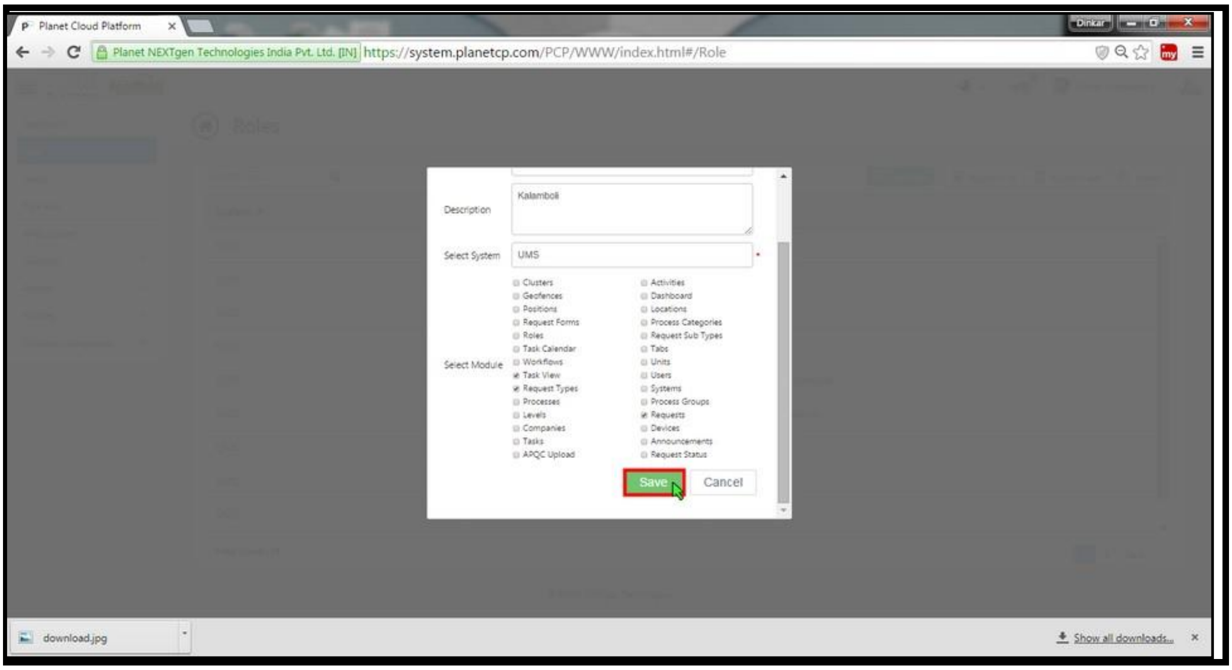


Figure 3-5

3.2 Edit a Role

- **Step 1-** Click on **(Edit)** ✎ icon

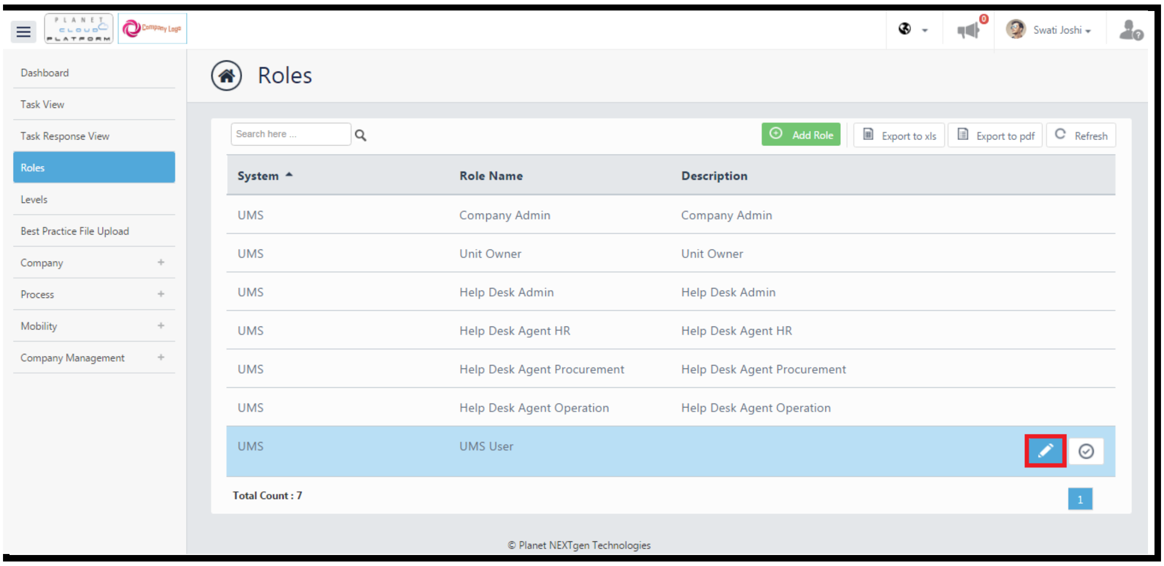


Figure 3-6

- **Step 2 –** Edit the desired fields according to the changes to be made in the window.

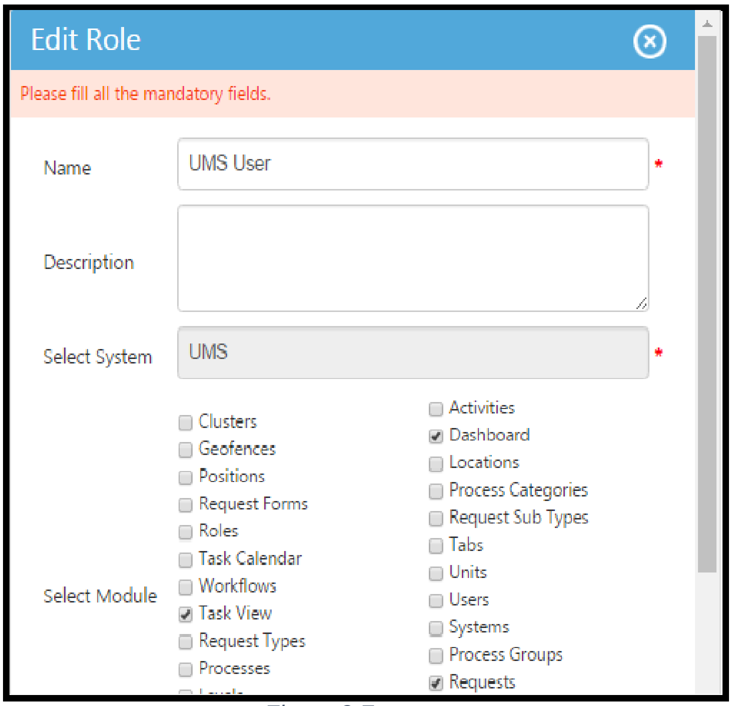


Figure 3-7

- **Step 3-** Click on **Save** button.

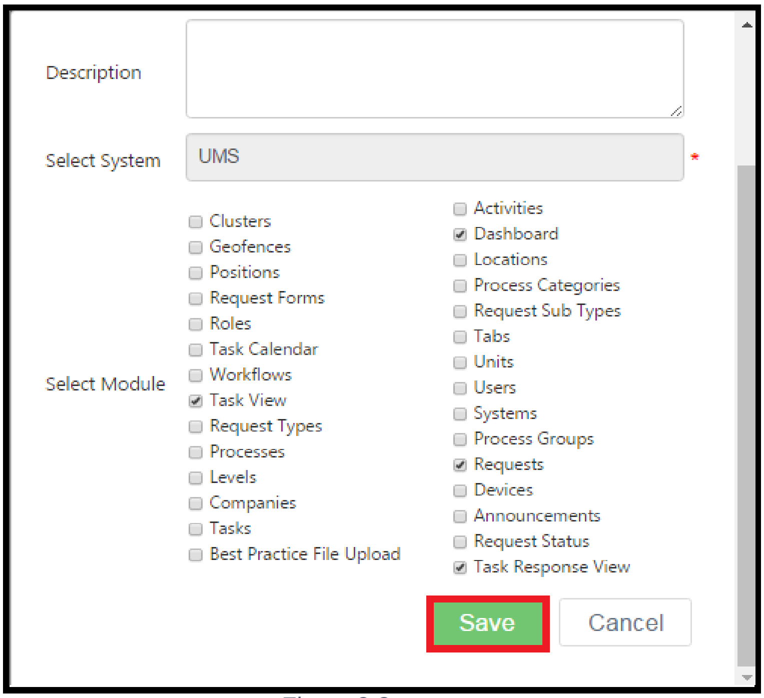


Figure 3-8

3.3 Activate / Deactivate a Role

- **Step 1-** Click on **Deactivate** button, a pop message will display as, “Are you sure you want to deactivate the Role” with **Ok** and **Cancel** button. Select Ok to deactivate.

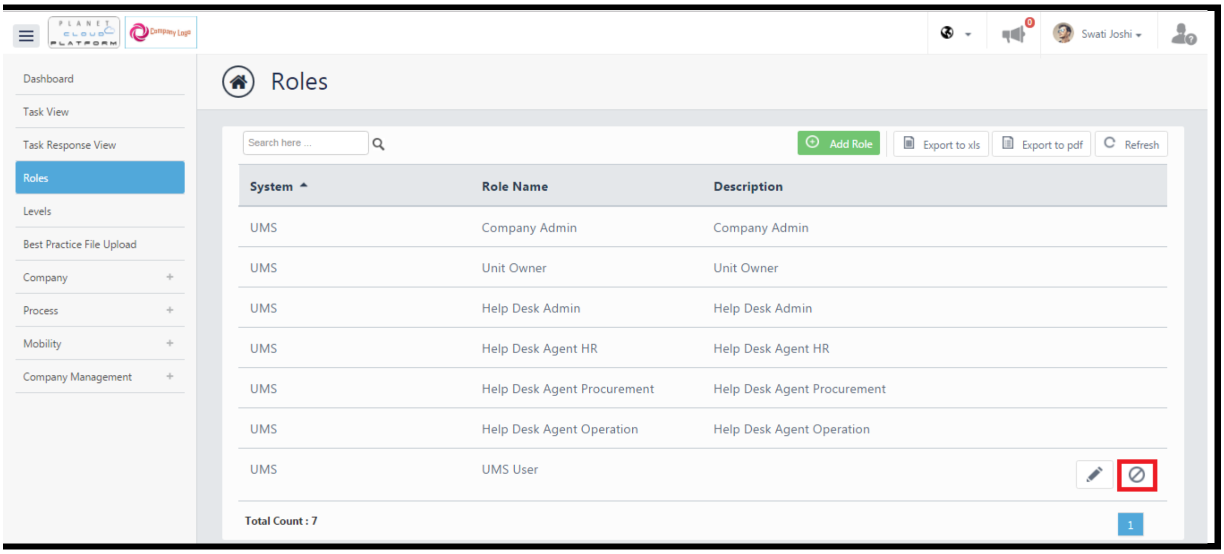
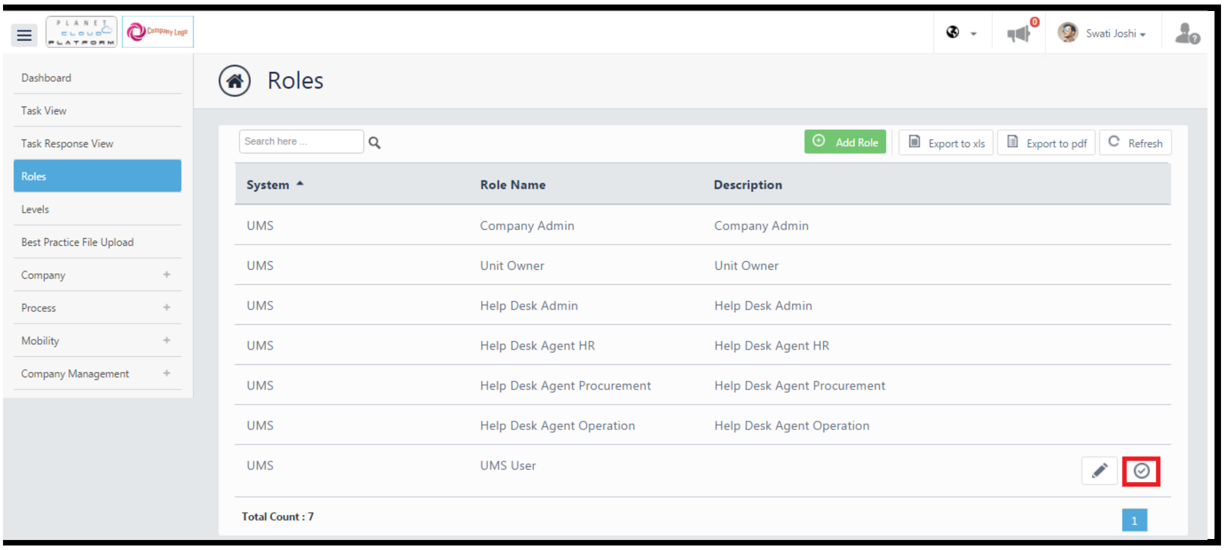


Figure 3-9

- **Step 2-** Click on **Activate** button, a pop message will display as, “Are you sure you want to activate the Role” with **Ok** and **Cancel** button. Select Ok to Activate it again.



Roles
Search here ...
Add Role
Export to xls
Export to pdf
Refresh
Dashboard
Task View
Task Response View
Roles
Levels
Best Practice File Upload
Company
Process
Mobility
Company Management
Swati Joshi
System
Role Name
Description
UMS
Company Admin
Company Admin
UMS
Unit Owner
Unit Owner
UMS
Help Desk Admin
Help Desk Admin
UMS
Help Desk Agent HR
Help Desk Agent HR
UMS
Help Desk Agent Procurement
Help Desk Agent Procurement
UMS
Help Desk Agent Operation
Help Desk Agent Operation
UMS
UMS User
Total Count : 7

Figure 3-10

4.0 BEST PRACTICES FILE UPLOAD

- **Description**

A best practice is a method or technique that has been generally accepted as superior to any alternatives because it produces results that are superior to those achieved by other means or because it has become a standard way of doing things, e.g., a standard way of complying with legal or ethical requirements.

Best practices are used to maintain quality as an alternative to mandatory legislated standards and can be based on self-assessment or benchmarking. Best practice is a feature of accredited management standards

- **Features**

Best practices for the company are uploaded in a formatted .csv file, which is first prepared in Microsoft Excel or a similar spreadsheet software. Each Column has to be filled and entered according to standards mentioned below.

To familiarize with the format and columns refer the next section given below.

4.1 Format of Excel File

Table Column	**Description**
Cluster	A group of similar things or people positioned or occurring closely together.
Tab	A level of identification from within a wide range of entries for better organization.
Process Category	The highest level of process in the company
Process Category Purpose	A description or statement of purpose for the Process Category above.
Process Group	The next level of processes representing the group of processes within the same Category.
Process Group Purpose	A description or statement of purpose for the Group of processes above.
Process	Each process from the group decomposed which includes core elements related to the process
Process Purpose	A description or statement of purpose for the each individual process above.
Activity	Indicates the key elements and details needed to be performed while executing the processes.
Activity Purpose	Descriptive purpose for the activities included in each process.

4.2 Creating the Best Practices Excel File

Step 1 – Open your native spreadsheet application. (e.g. Microsoft Excel) and select New Blank Workbook.

Step 2 – Always use the first row as header row. Use the following headers given below for the Best Practices file:

- Cluster
- Tab
- Process Category
- Process Category Purpose
- Process Group
- Process Group Purpose
- Process
- Process Purpose
- Activity
- Activity Purpose

Step 3 – Next start populating each row according to its header using the instructions provided below.

4.2.1 Input of Data

- Enter all data in correct grammatical order with the first alphabet in Upper case and all further alphabets in lower case.
- Be mindful to avoid adding extra "invisible" characters (such as blank spaces or tabs after the text) to the tables that may cause problems when importing the data.
- Make sure the numbering on the data is carefully inspected.
- Process Categories, Groups, Processes and Activities should have the appropriate numbering before them followed by the data and succeeded by an evenly spaced hyphen followed by its respective Tab name. such as 2.0<space>Data<space><hyphen><space>Tab. For e.g. **1.0 Manage Financial Resources – Finances.**
- No 2 activities can have the same serial no.
- Complete entries for the entire row under the important column headings. Blank cells can also cause problems during import.

4.2.3 How to fill in the data

Following the flowchart given below, each elements have a one-to-many relationship except for Activities. (Each activity has to be uniquely numbered).

- **Cluster:** Name your cluster according to the type of processes it will be having. For e.g. All financial related processes and activities can belong to a single cluster as **Finance**, or all cleanliness, safety and maintenance related processes and activities can belong a cluster called **Building Maintenance**. It’s better to prepare the list of clusters to be used beforehand and proceed populating each cluster individually.

- **Tab:** A tab would a level deeper into a Cluster highlighting elements within a Cluster that can be mapped into processes and activities. For e.g. The **Finance** cluster can include Tabs such as **Taxes, Salary, Rent** etc. and have processes and activities built around these tabs.

- **Process Category:** Categories should be written with a number preceding it. Based on the descriptions provided in Section 4.1. For e.g. a process category for the **Finance** cluster would have a category such as **1.0 Manage Financial Resources.** The 1.0 that precedes it is mandatory as the following elements would be linked to this process category.

- **Process Category Purpose:** A description or statement of purpose for the Process Category. (This field is optional).

- **Process Group –** Process groups are named based on the functions that its inclusive process accomplish. These would then map or be decomposed into those list of individual processes. Groups are numbered as sub-divisions of the process category. For e.g. Selecting **1.0 Manage Financial Resources** as a category, its process groups could include, **1.1 Perform revenue check, 1.2 Manage taxes, 1.3 Manage invoices** etc.

- **Process Group Purpose -** A description or statement of purpose for the Process Group. (This field is optional).

- **Process** – This is further breakdown of the each process that is comprised in the group. Processes are numbered using the Group number to maintain link with the respective Group and Category. For e.g. **1.3 Manage invoices** can have processes such as **1.3.1 Manage buyer invoices, 1.3.2 Manage seller invoices, 1.3.4 Check balance sheets against invoices** etc.

- **Process Purpose -** A description or statement of purpose for the Process. (This field is optional).

- **Activity –** These are the events that need to take place to perform the process it is linked to. These same activities will be used to link the tasks so each should be named and numbered appropriately. For e.g. **1.3.2 Manage seller invoices** would have activities such as **1.3.2.1 Record ordered product data, 1.3.2.2 Check and Generate order invoices, 1.3.2.3 Transmit generated customer invoices**, etc.

- **Activity Purpose -** A description or statement of purpose for the Activity. (This field is optional).

4.2.4 Uploading the Excel file

After the file has been created and checked so that all formatting matches the given instructions, we can upload the file into the system using the steps given below.

Step 1 – First open your Best Practices spreadsheet

Step 2 – Goto File > Save As and Save as type CSV with the same name.

Step 3 – Next go to the Dashboard and navigate to the **Best Practices File Upload** tab as shown below

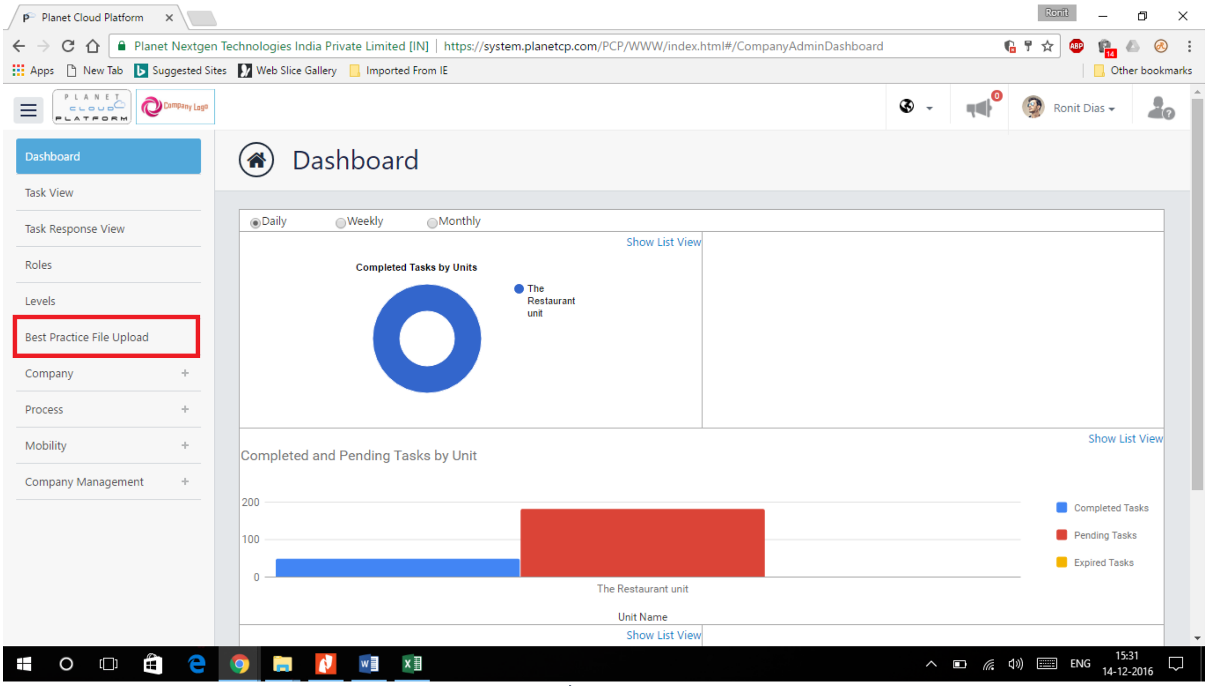


Figure 4-1

Step 4 – Click on the '**Choose File'** button and select the .csv file you had created in Step 2. Once selected click the '**Add**' button and wait for the message '**Best Practices file uploaded successfully**'.

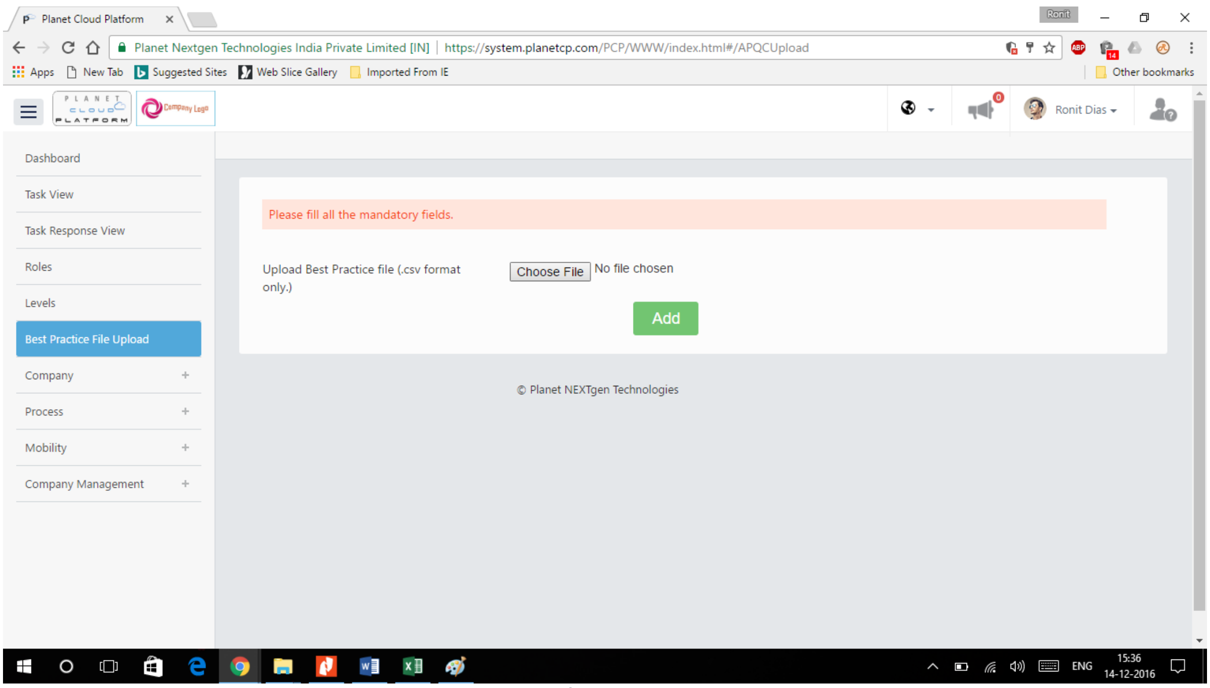


Figure 4-2

5.0 COMPANY

5.1 Position

- **Description**

Positions are created on based the designations each employee has in the organization. This helps to delegate tasks and responsibilities onto different users accordingly. Hierarchy is maintained by having reporting positions to show which positions have a lead over the other.

- **Features**
  - Positions can be created by the Company Admin only.
  - Reporting positions can be set to show hierarchy.
  - Positions can be edited.
  - List of Positions can be exported to Excel and PDF files.
- **Drawbacks**
  - Positions created cannot be deleted, they can only be deactivated.
  - Reporting positions can only selected from list of created positions.

5.1.1 How to create a position

- **Step 1**- Click on "**Position**" button in the Company drop down options.

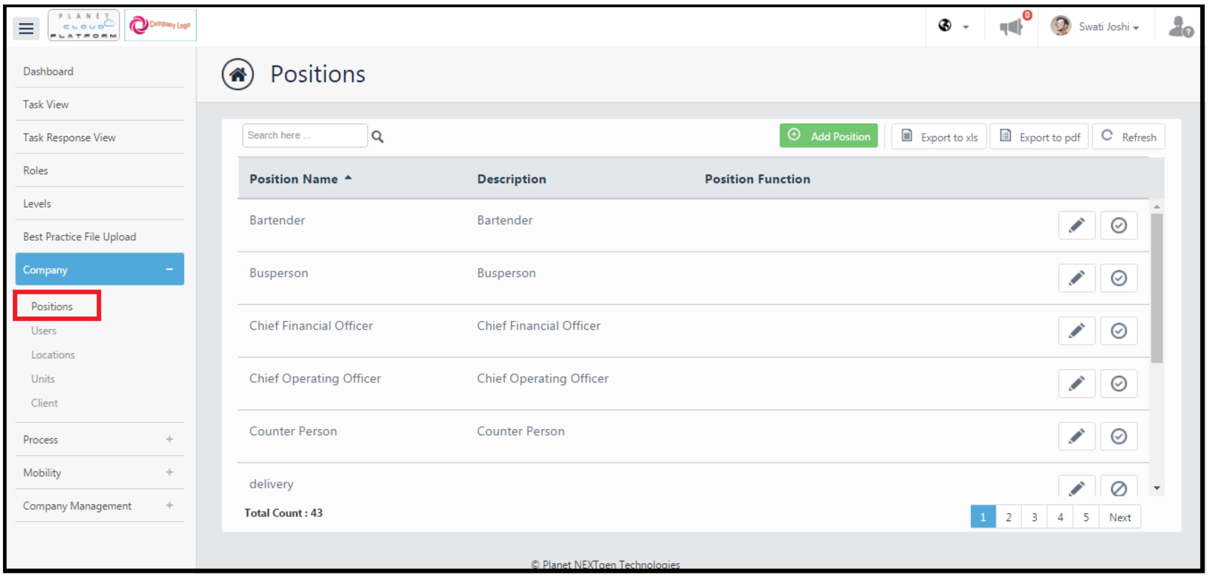


Figure 5-1

- **Step 2-** Click on the **Add Position** button.

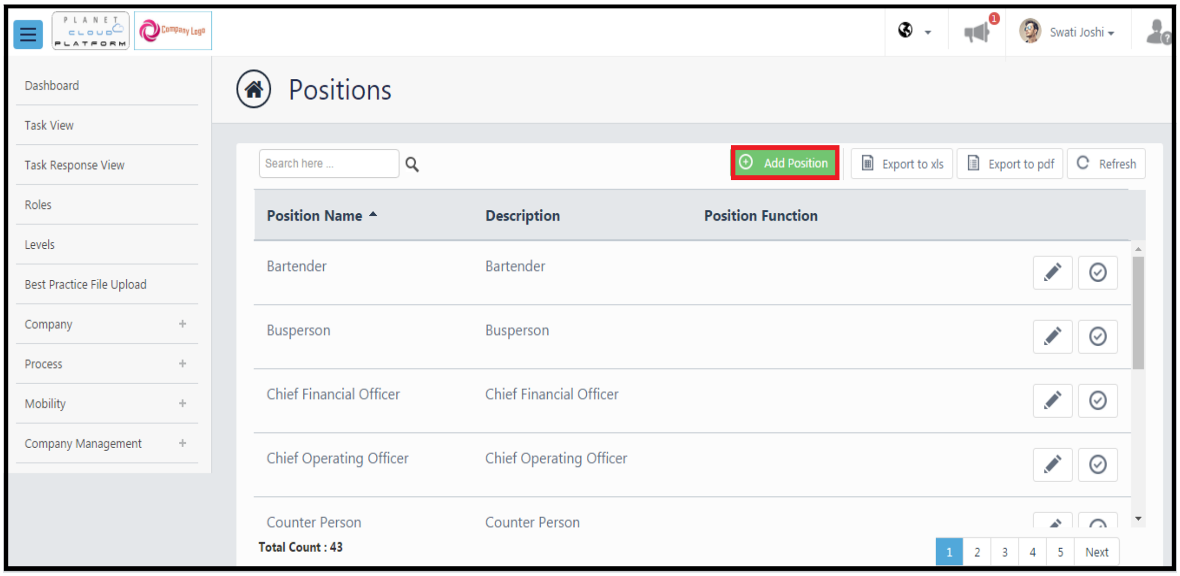


Figure 5-2

- **Step 3-** In the **Name** field; enter the position name to be created. For e.g., enter "**Regional Manager - HR**". In the **Department** field, enter the Department**.** In the **Description** field, enter the Description of position. In the bottom right 'Select Reporting Manager' field, you can select the reporting manager or a step above position for the created one from the existing ones. (Note: If the position you want isn't mentioned in the list then create that Position first and move on accordingly.)

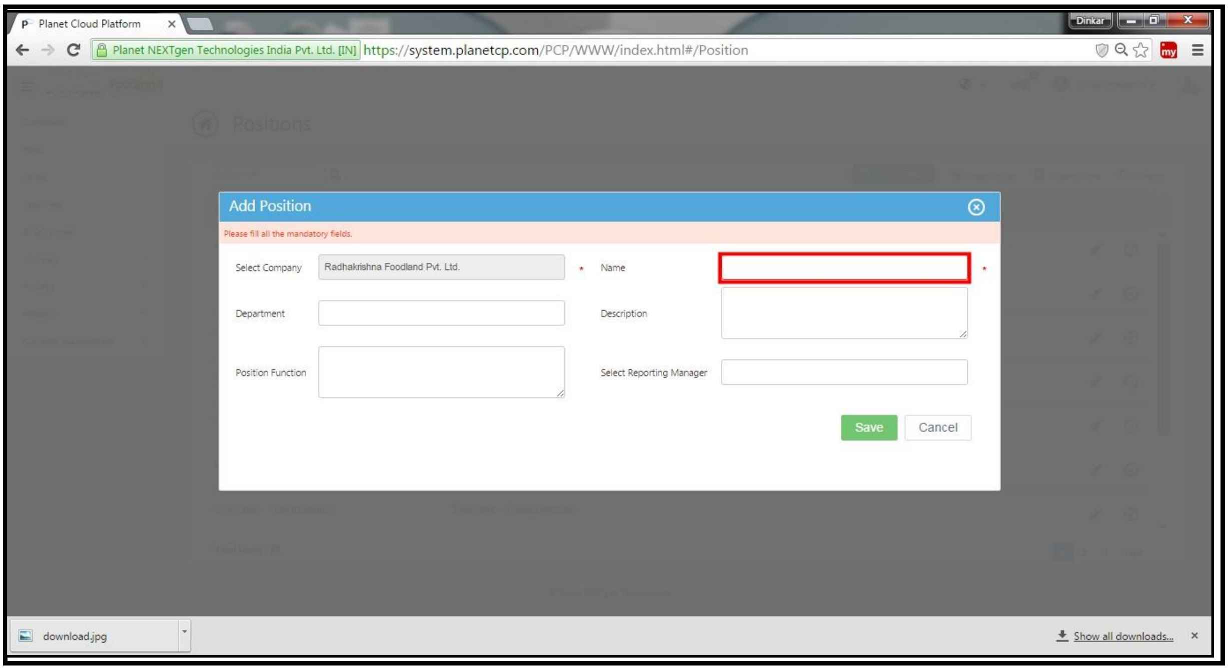


Figure 5-3

- **Step 4**- Click on the **Save** button.

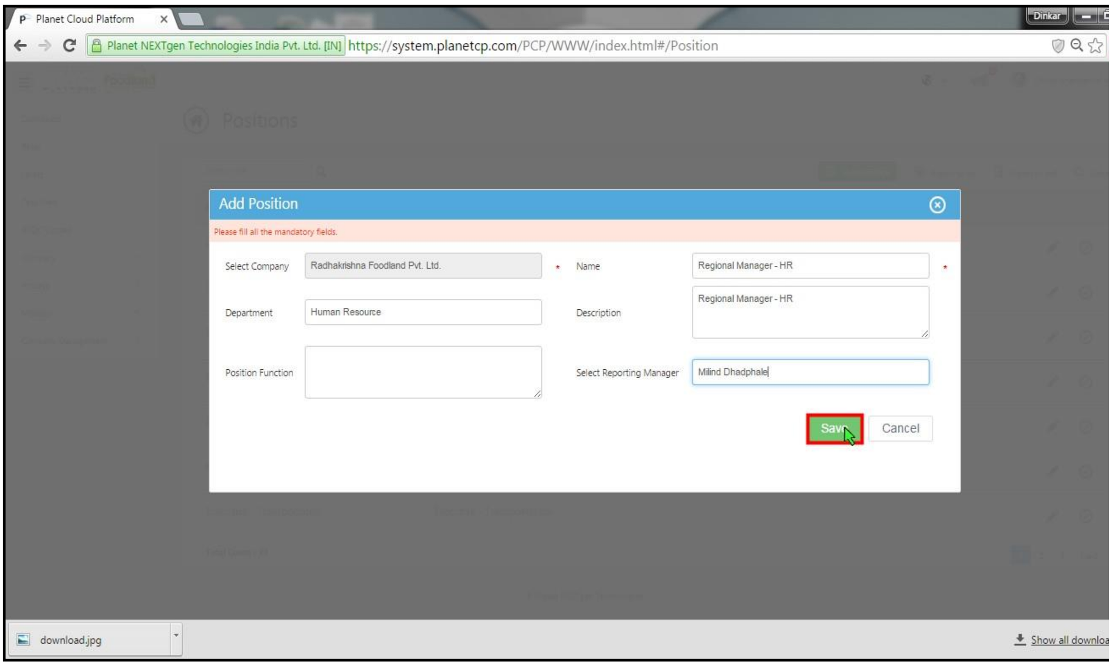


Figure 5-4

5.1.2 Edit a position

- **Step 1-** Click on **(Edit)** icon

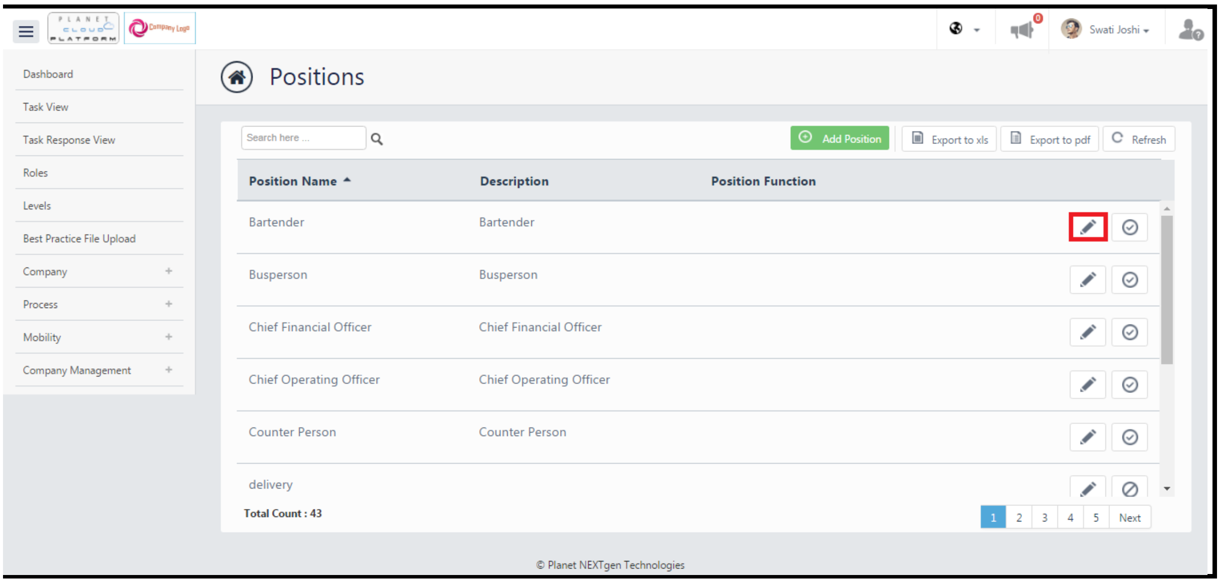


Figure 5-5

- **Step 2-** Edit the fields you desire from the options shown in the window.(Figure 5-6)

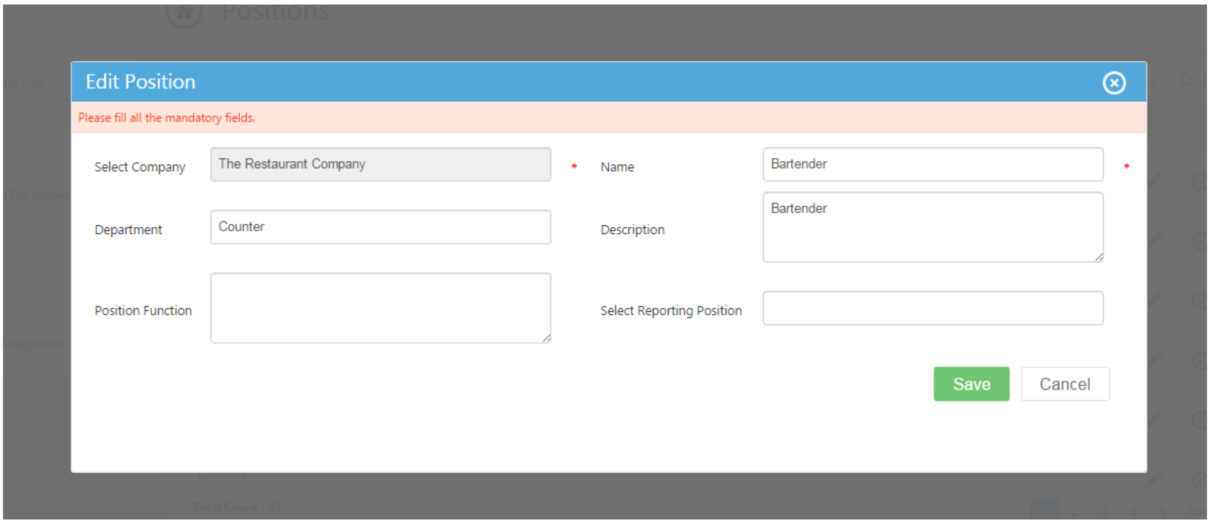


Figure 5-6

- **Step 3-** Click on **Save** button to save the changes you made in **Step 2**.

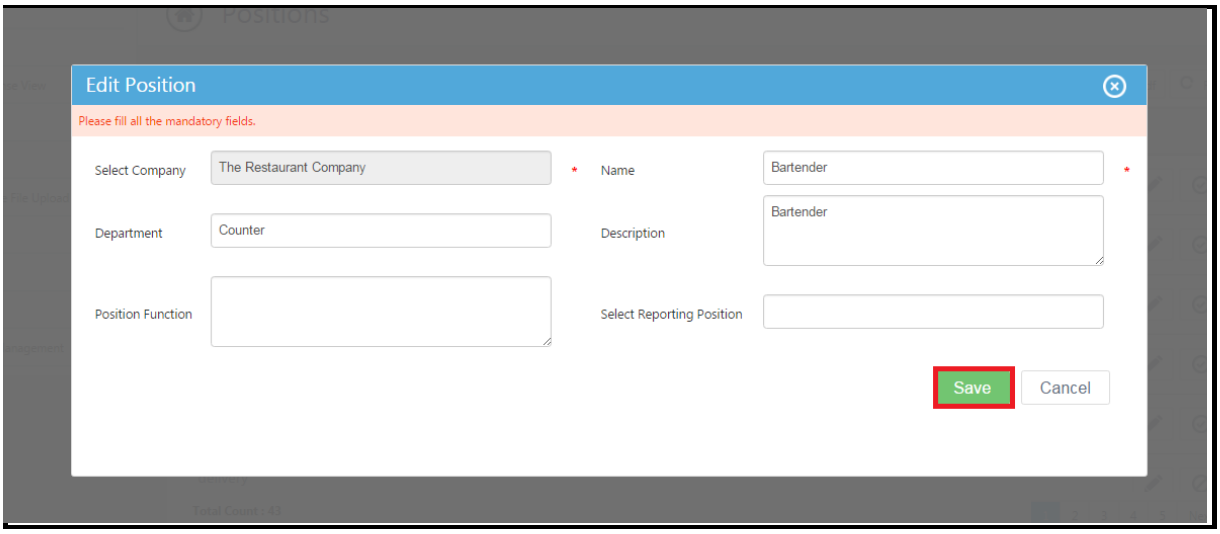


Figure 5-7

5.1.3 Activate / deactivate a position

- **Step 1-** Click on **Deactivate** button, a pop message will display as, “Are you sure you want to deactivate the Position” with **Ok** and **Cancel** button. Select Ok to deactivate it.

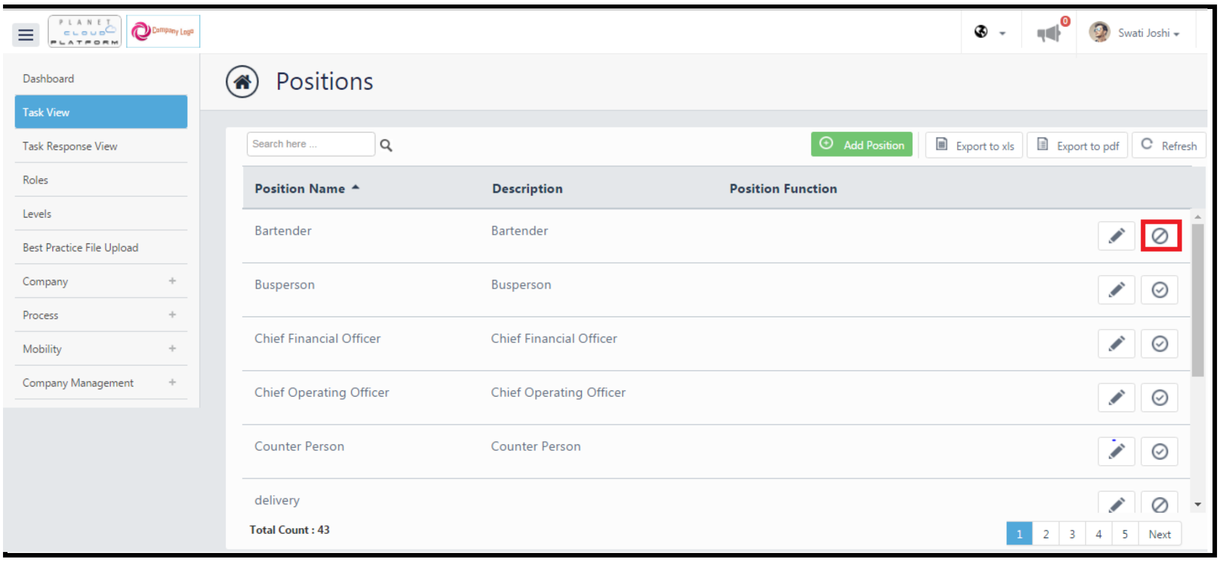


Figure 5-8

- **Step 2-** Click on **Activate** button, a pop message will display as, “Are you sure you want to activate the Position” with **Ok** and **Cancel** button. Select Ok to activate it again.

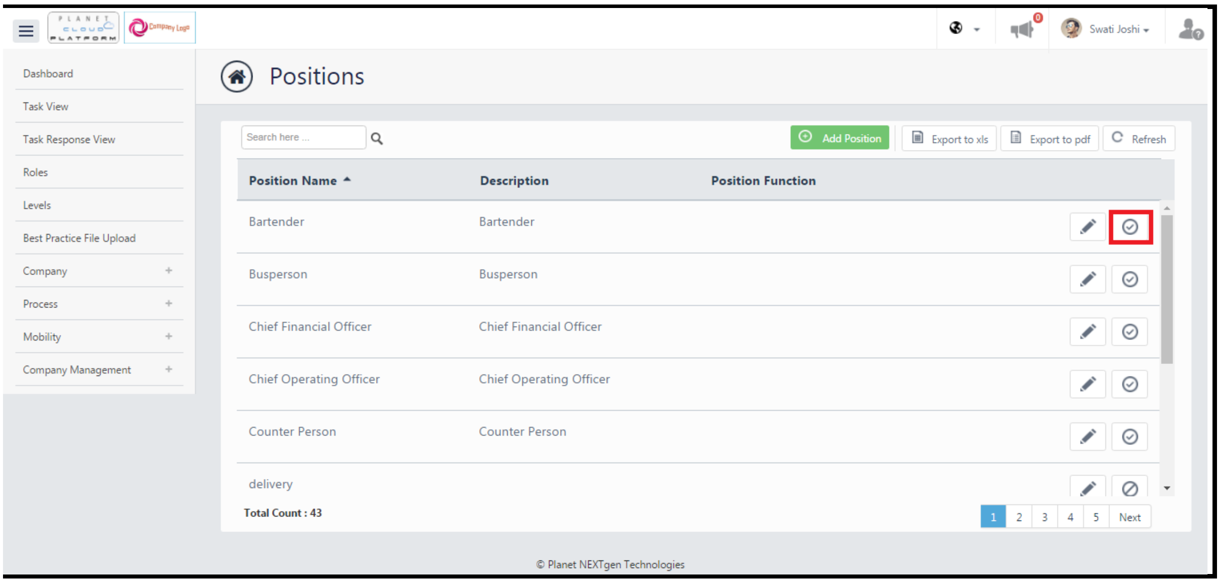


Figure 5-9

5.2 Users

- **Description**

Users are the ones who will be interacting with the system, the Company Admin is considered the first user of the system. Users can then be added by the Company Admin in a variety of either predefined or newly created roles. These Users are then assigned positions and tasks are accordingly sorted and given. Each new User would have to go through the same Setup procedures we had seen in Chapter 2.

- **Features**
  - Users can be created by the Company Admin only.
  - Users can be assigned more than one Roles and Positions.
  - User details can be edited or updated
  - List of all Users can be exported to Excel and PDF files.
- **Drawbacks**
  - Users created cannot be deleted, they can only be deactivated.
  - Any created User has to be given at least one Role in the system.

5.2.1 How to create a user

- **Step 1-** Click on **User** from the Company drop down options.

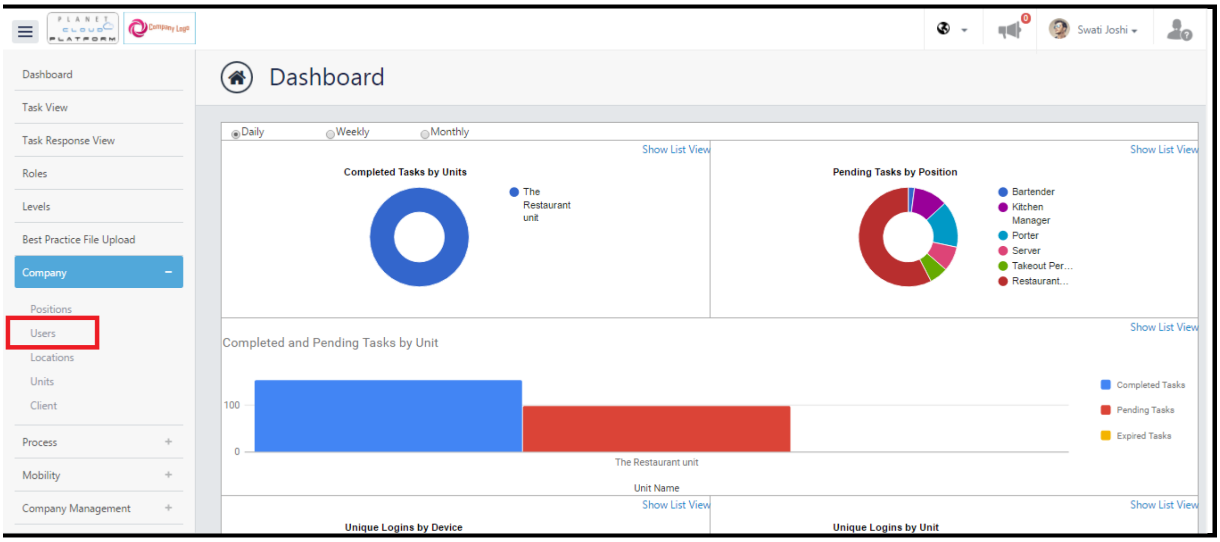


Figure 5-10

- **Step 2-** Click on **Add User**

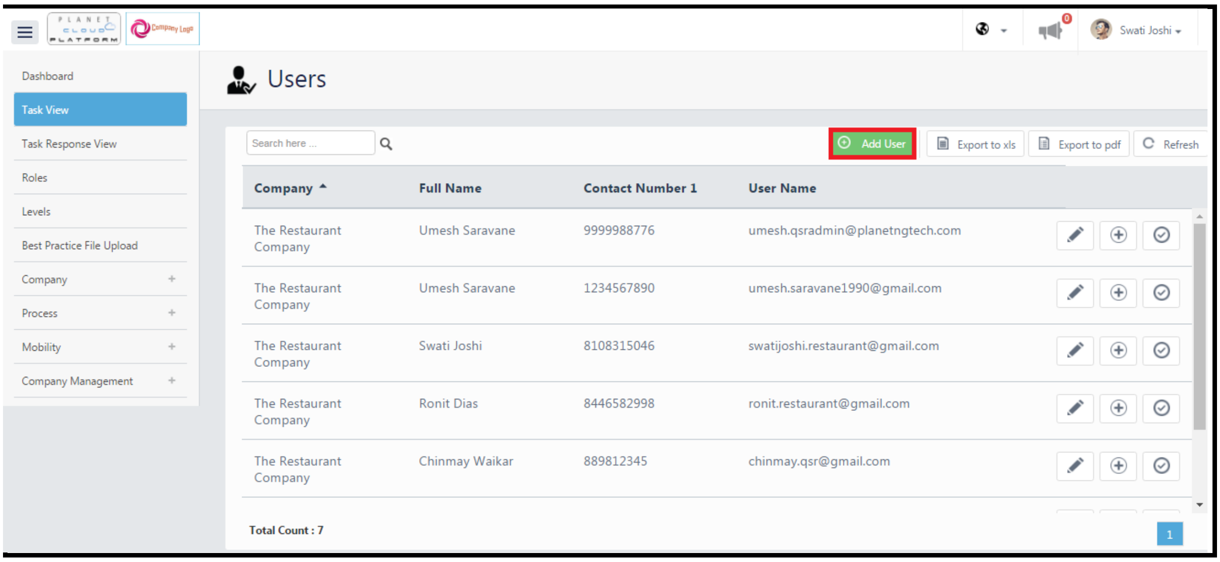


Figure 5-11

- **Step 3-** Fill in the following fields as given below:
  - In the **Full Name** field, enter the desired Name. In the **Address** field, enter the desired Address.
  - In the **Contact Number1** field, enter the telephone number of the respective User.
  - In the **Contact Email Id** field, enter the Email ID to be used as the log-in username and for primary contact. (**Note:** This field cannot be changed later on.)
  - Click on the **Select Direct Manager** field and select which existing user this new user will report to. (Note: Reporting managers can be only selected from existing users. If reporting manager doesn't exist, create his/her User first.)
  - Click on the **Pre Tolerance** field and set the appropriate tolerance amount. (**Note:** Tolerance level has to be given as "0". Unless the user has the task which has high tolerance level. In such case provide actual tolerance level and add additional five days.)

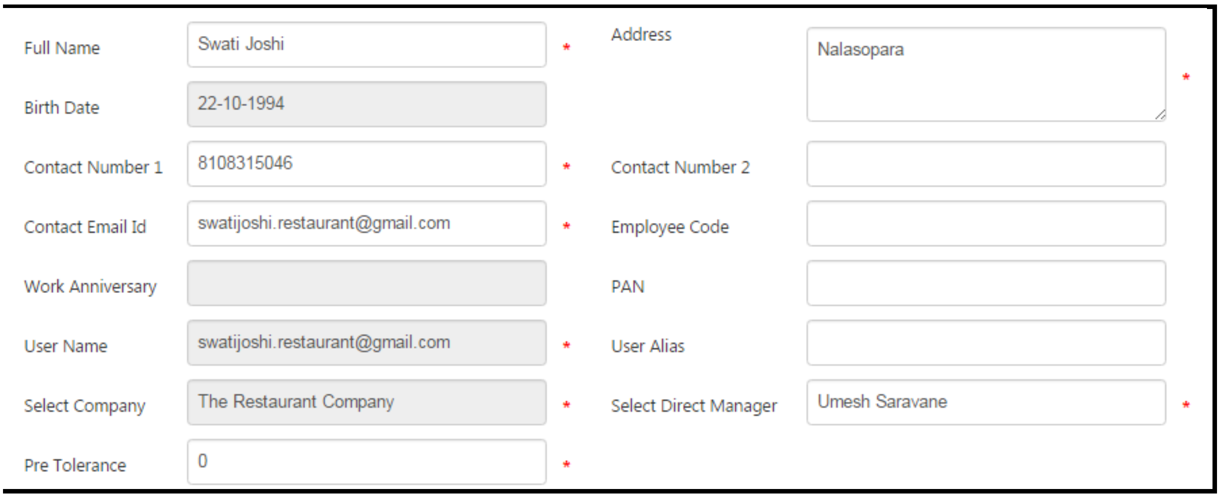


Figure 5-12

Provide all relevant details in all the mandatory field (*) marked.

- **Step 6-** Fill in the following as given below:
  - In the **Select System** field, select the system which user will be accessing. (If you want to assign one or more Role to the User, you can do it in this menu.)
  - Select the desired **Role** from the list. For e.g., select "**Unit Owner**". (**Note:** Select role as "**Unit Owner**" for Unit Managers and "**UMS User**" for all other users)
  - Select the **Default System** check-box for the User's default system and click on **Save** button to save it. (**Note:** You can select only one system as default system.)
  - Click on **Save** button

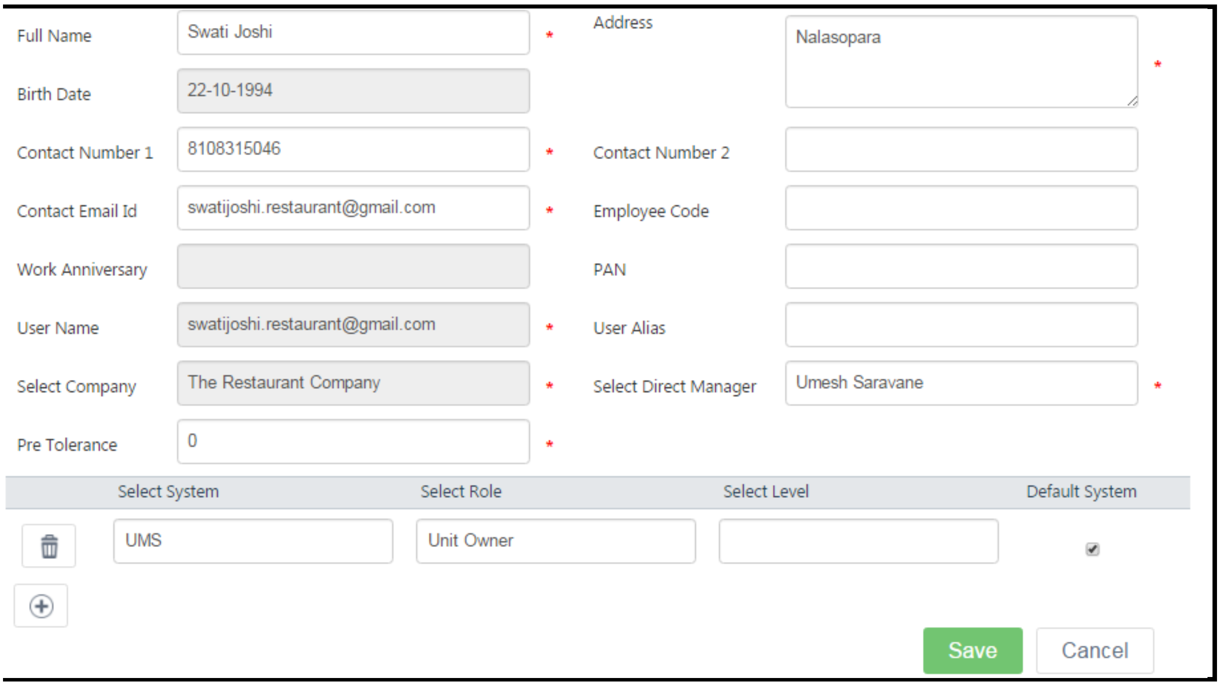


Figure 5-13

5.2.2 Edit a User

- **Step 1-** Click on (**Edit**) icon for the User you want to edit.

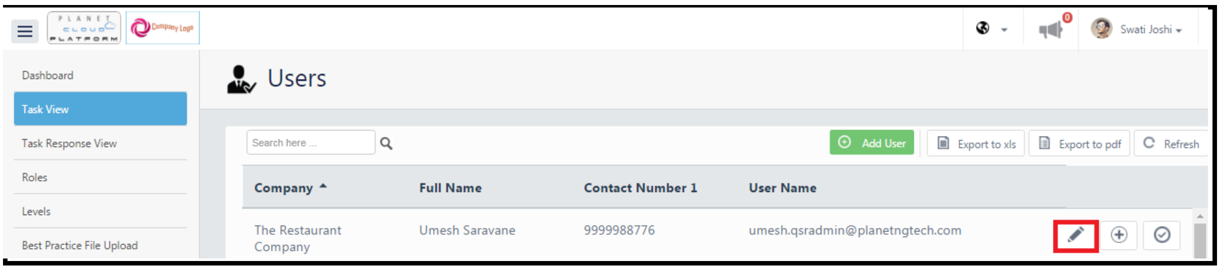


Figure 5-14

- **Step 2-** Edit your desired fields and click on **Save** button to save all the changes. Not all fields can be edited.

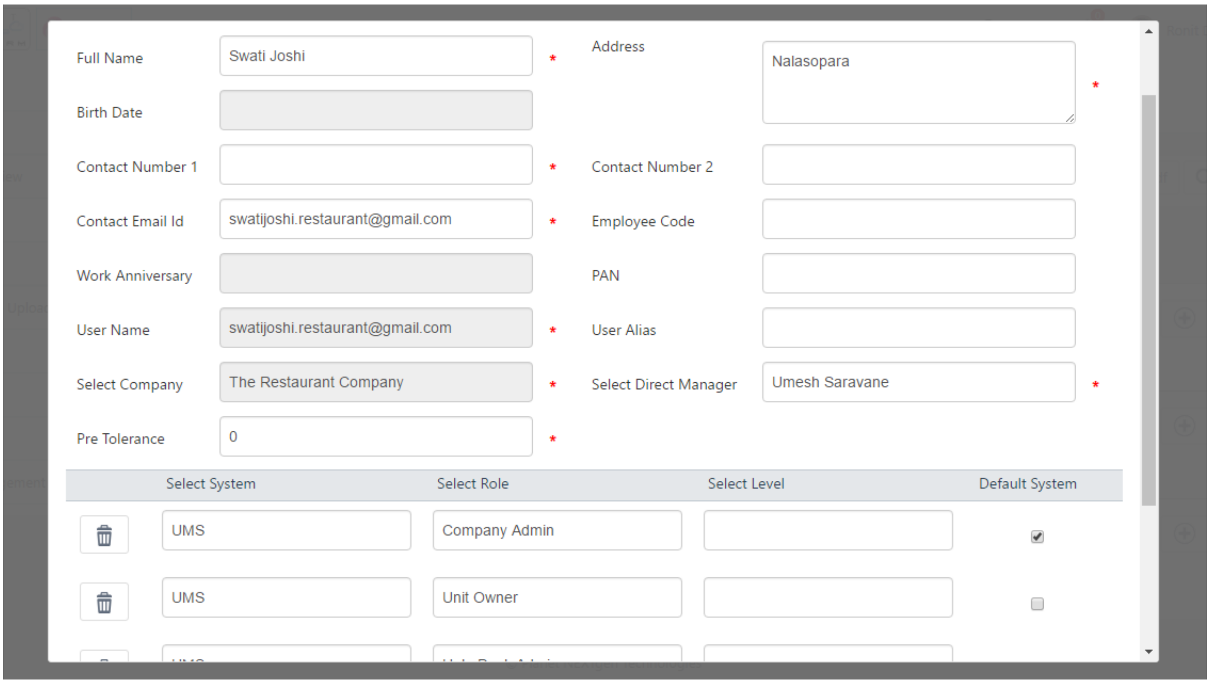


Figure 5-15

5.2.3 Assign positions to user

- **Step 1-** Click on the **Add** icon.

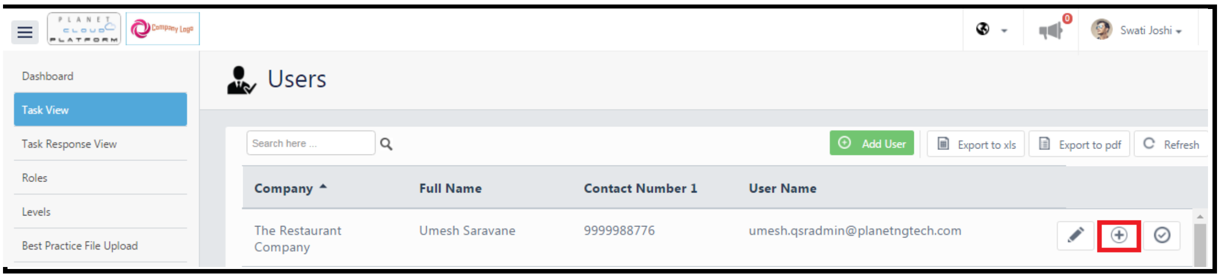


Figure 5-16

- Step 2- In the **Position** field, select the Position from dropdown list. For e.g., select "**Unit Owner**". (**Note:** Only Positions created in the system will appear in the drop down menu.)

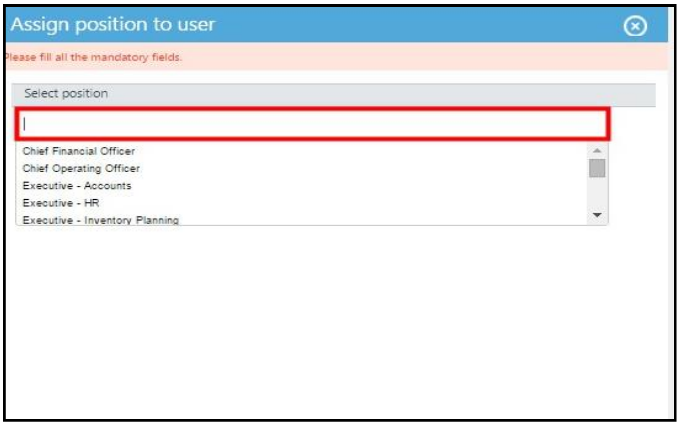


Figure 5-17

- **Step 3**- Click on **Save** button to save the changes.

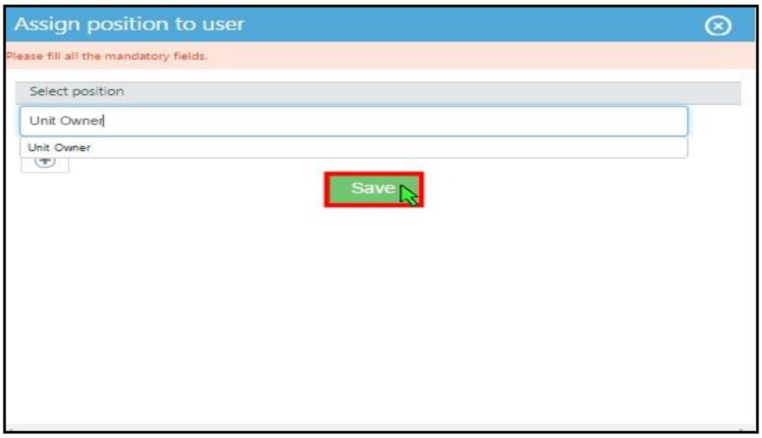


Figure 5-18

5.2.4 Activate / deactivate a user

- **Step 1-** Click on **Deactivate** button, a pop message will display as, "Are you sure you want to activate the User" with **Ok** and **Cancel** button. Select Ok to activate it

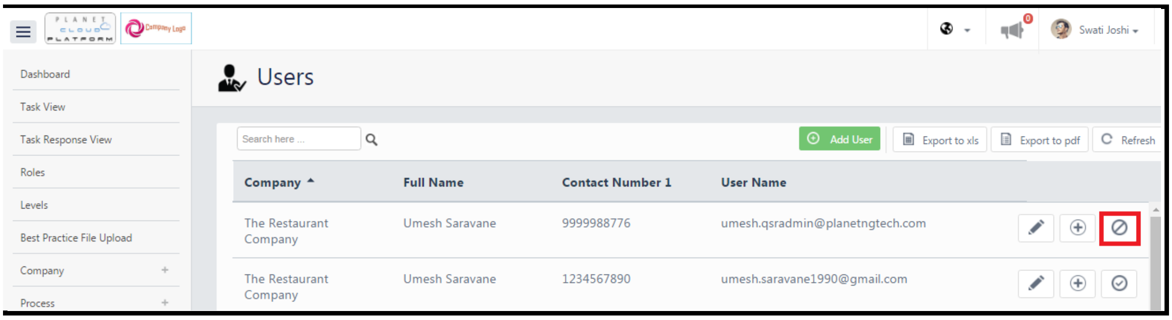


Figure 5-19

- **Step 2-** Click on **Activate** button, a pop message will display as, "Are you sure you want to deactivate the User" with **Ok** and **Cancel** button. Select Ok to deactivate it again.

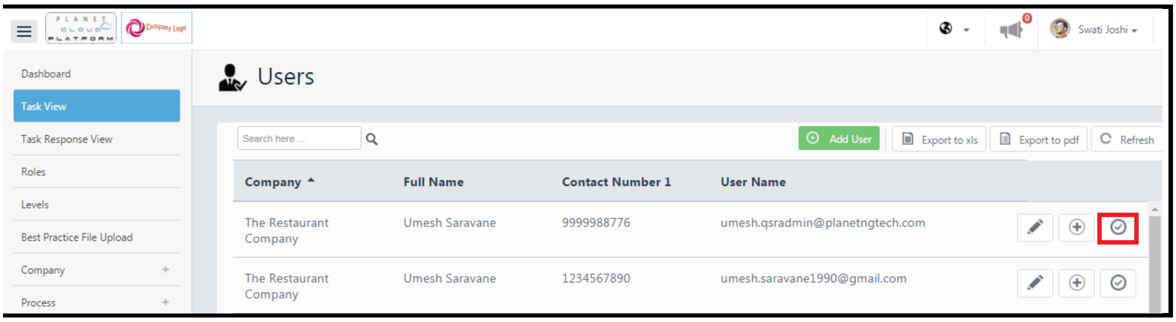


Figure 5-20

5.3 Locations

- **Description**

Add various geographical Locations (similar to branches) for a company according to the purpose each location serves to make task and employee management easier. These geographical Locations also help in setting up Units based on those purposes within the company for further ease in task management.

5.3.1 How to create a location

- **Step 1-** Click on **Locations**

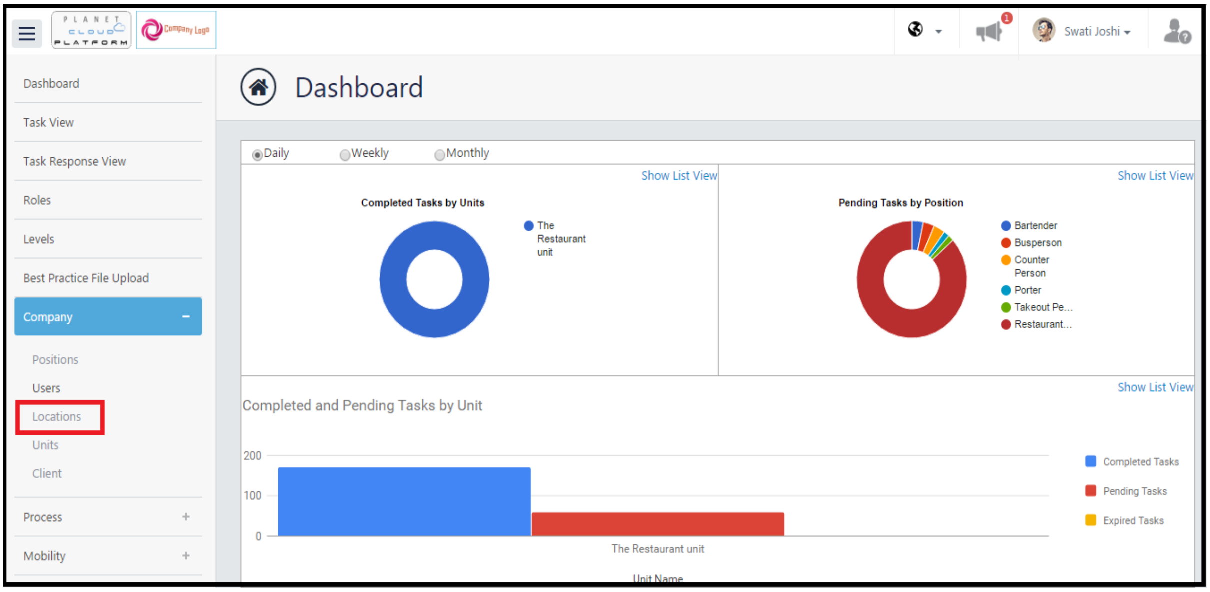


Figure 5-21

- **Step 2-** Click on the **Add Location** button.

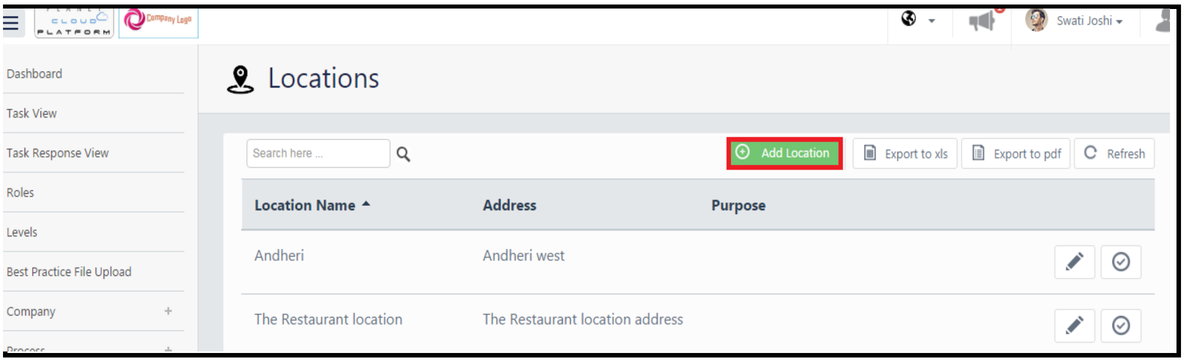


Figure 5-22

- **Step 3-** In the **Name** field, enter the Location Name of the area, in the **Address** field enter the street address of the location and in the **Purpose** field, enter the Purpose. For e.g. "**Shared Warehouse**".

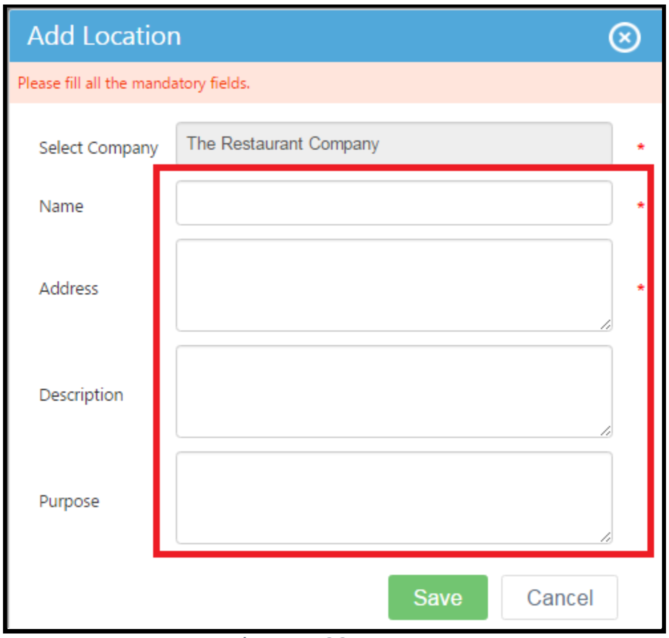


Figure 5-23

- **Step 4-** Click on the **Save** button.

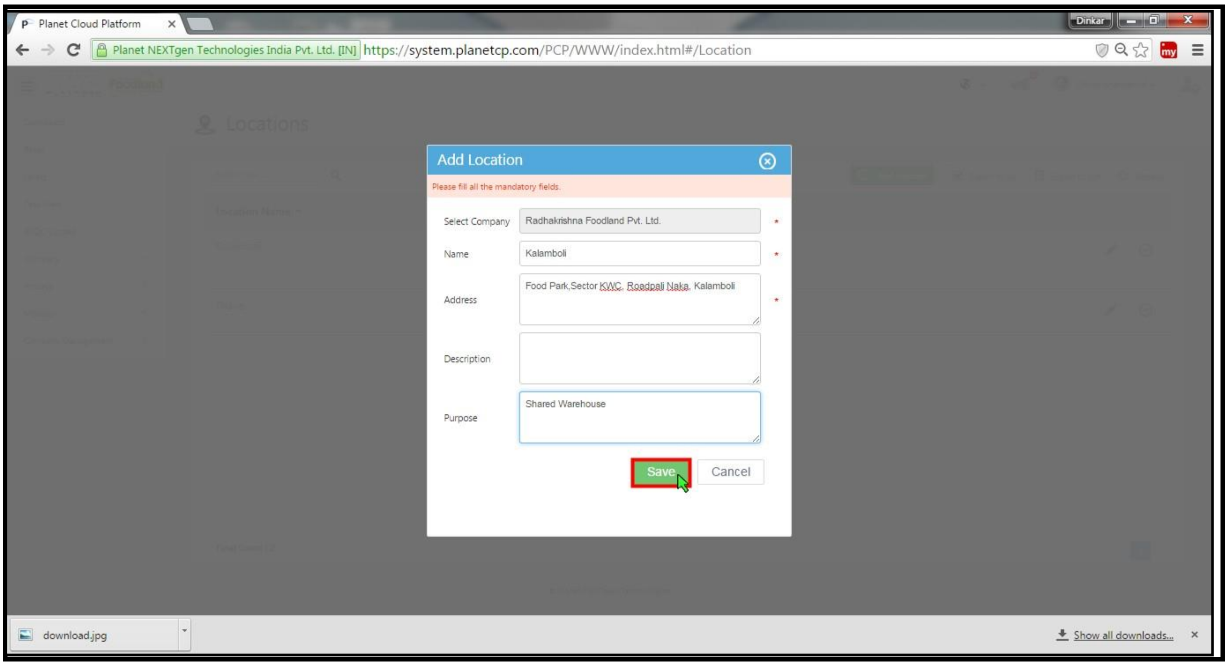


Figure 5-24

5.3.2 Edit a location

- **Step 1-** Click on **(Edit)** icon for the location you want to edit.

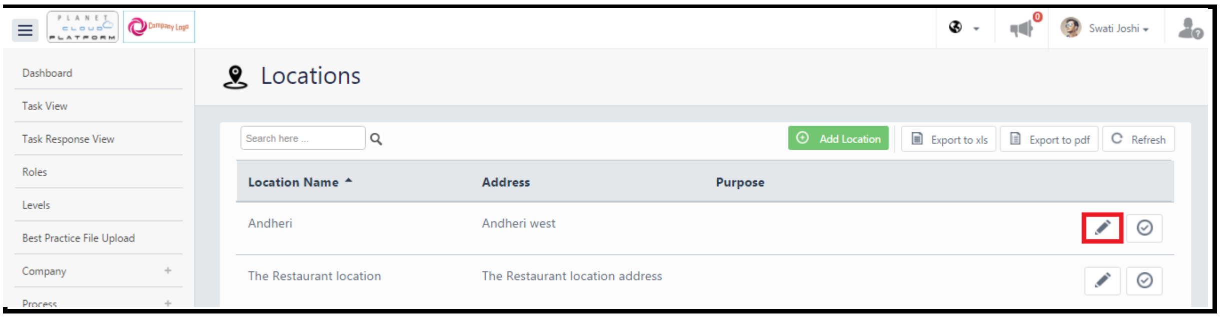


Figure 5-25

- **Step 2-** Edit the desired fields and click on **Save** button to save those changes.

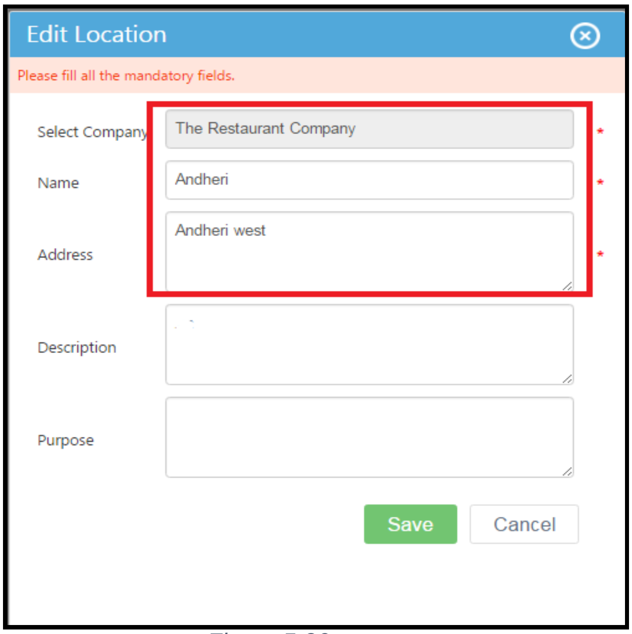


Figure 5-26

5.3.3 Activate / deactivate a Location

- **Step 1-** Click on **Deactivate** button, a pop message will display as, “Are you sure you want to deactivate the Location” with **Ok** and **Cancel** button. Select Ok to deactivate it.

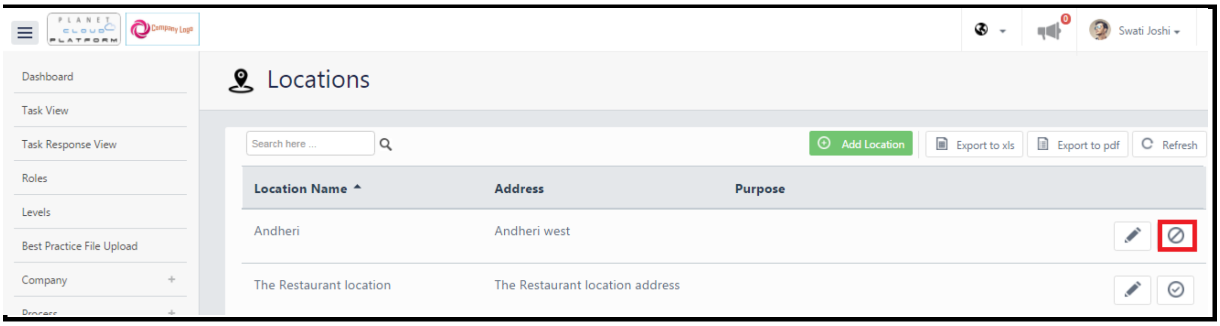


Figure 5-27

- **Step 2-** Click on **Activate** button, a pop message will display as, “Are you sure you want to activate the Location” with **Ok** and **Cancel** button. Select Ok to Activate it again.

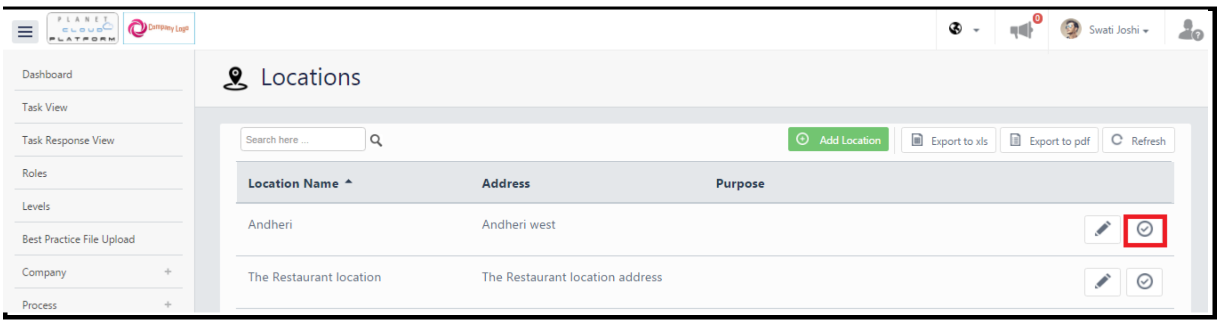


Figure 5-28

5.4 Units

- **Description**

A unit or business unit is a profit center which focuses on product offering and market segment. SBUs typically have a discrete marketing plan, analysis of competition, and marketing campaign, even though they may be part of a larger business entity.

5.4.1 How to create a unit

- **Step 1-** Click on **Units.**

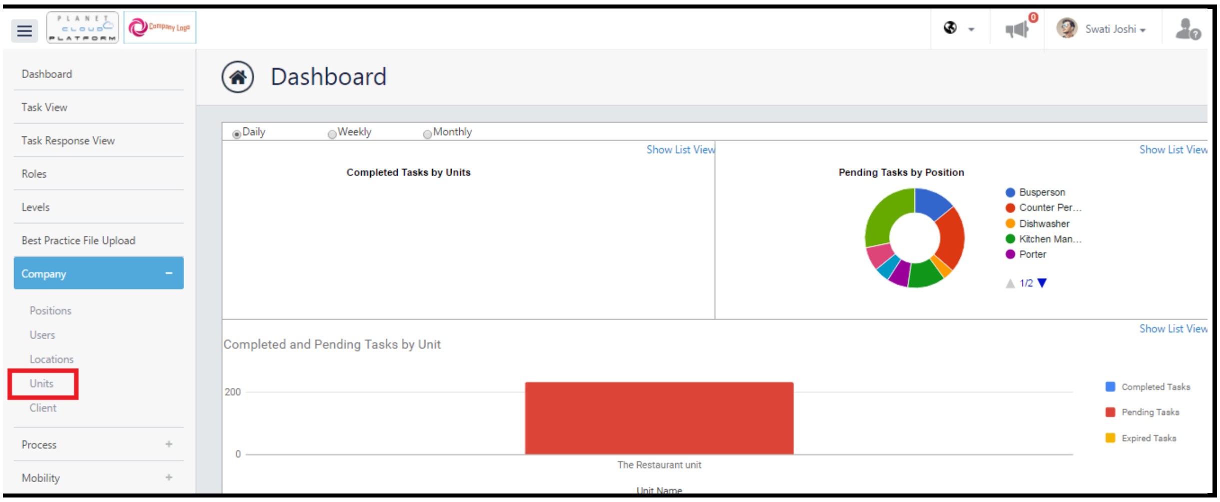


Figure 5-29

- **Step 2-** Click on the **Add Unit** button.

Figure 5-30

- **Step 3-** Fill in Name, Contact no, and Address for the Unit. Select Locations from the list of existing added locations.

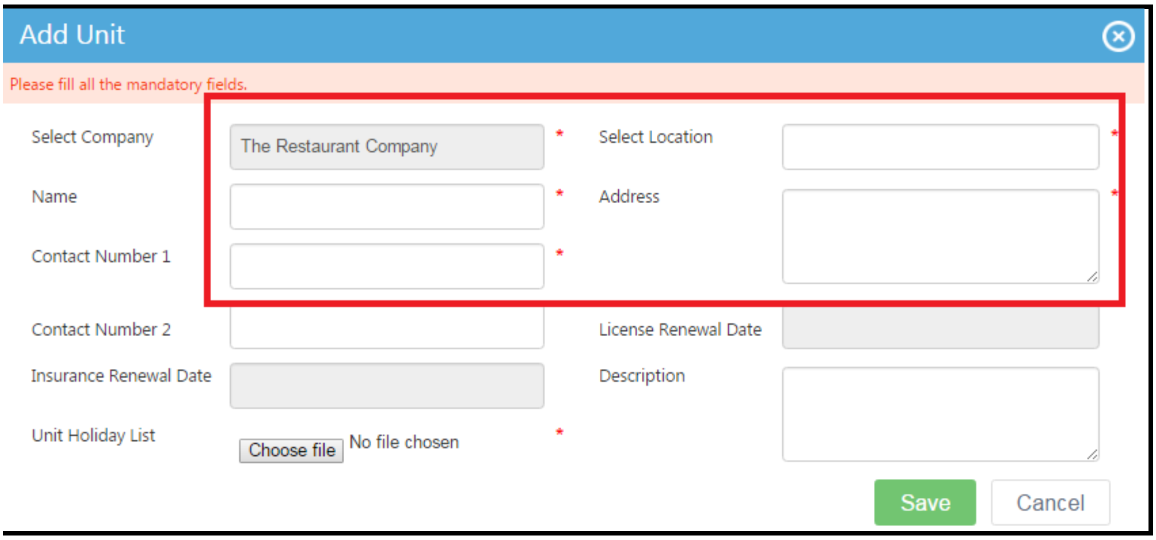


Figure 5-31

- **Step 4-** Next, Upload the Holiday List file in the system and click on Save to save the unit.

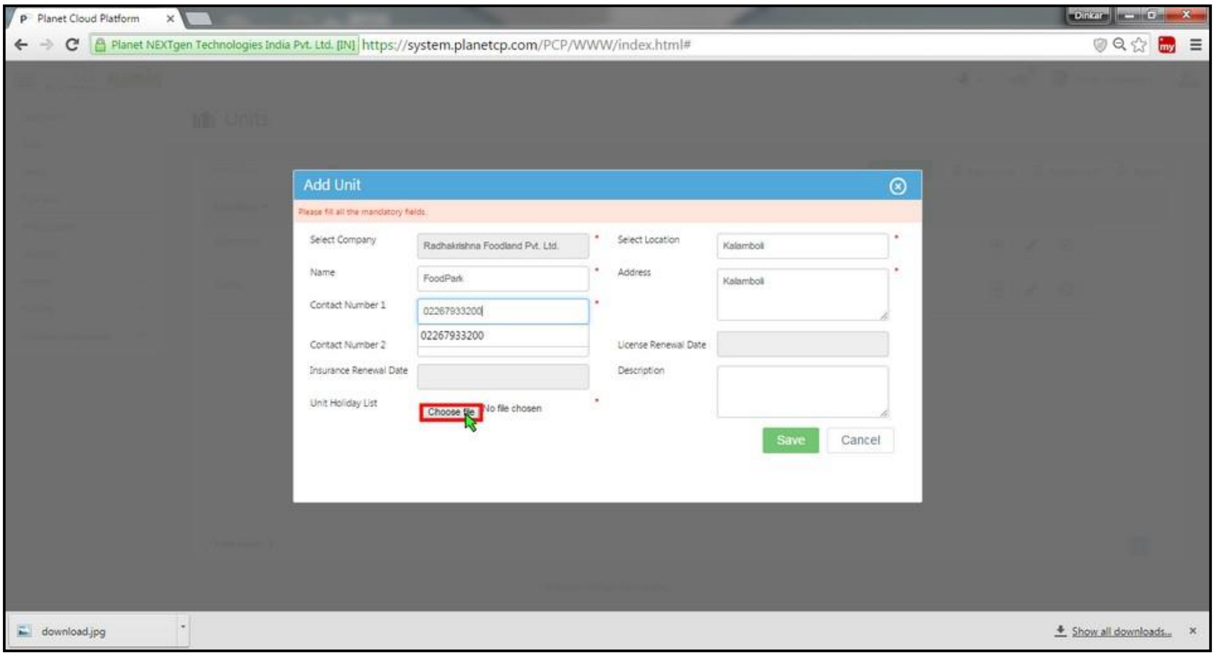


Figure 5-32

Upload the Unit Holiday List. The file should be in CSV Format. Column 1 (Heading - Occasion) and Column 2 (Heading - Date). Occasion should be the Festival name and Date should be in text format "DD/MM/YYYY" as shown below in Figure 5.33.

Occasion	Date
Gurunanak Jayanti	14-11-2016
Barah Wafat (Id-e-Milan)	13-12-2016
Convocation	20-12-2016
Christmas Day	25-12-2016
Winter Break	26-12-2016
Winter Break	27-12-2016
Winter Break	28-12-2016
Winter Break	29-12-2016
Winter Break	30-12-2016
Winter Break	31-12-2016

Figure 5-33

5.4.2 Edit a unit

- **Step 1-** Click on **(Edit)** icon

Figure 5-34

- **Step 2-** Edit the desired fields you want to and click on **Save** button

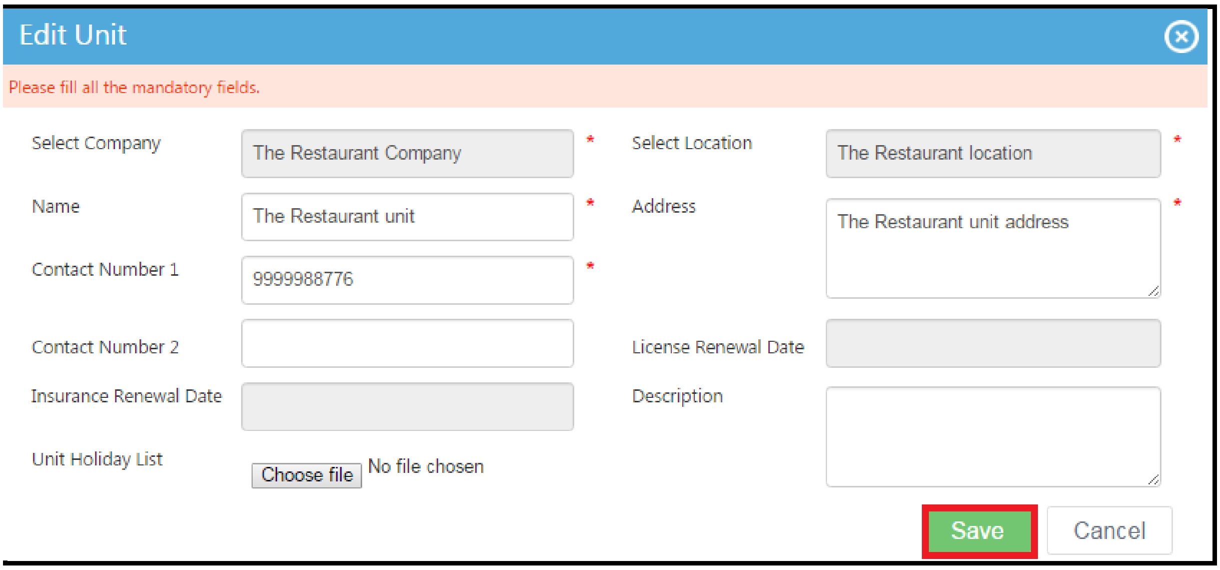


Figure 5-35

5.4.3 Assign Client(s) to Unit

- **Step 1-** Click on (**Assign Client(s) to Unit**) icon.

Figure 5-36

- **Step 2-** Click on **Client Name** field, select Client from dropdown list and click on **Assign** button.

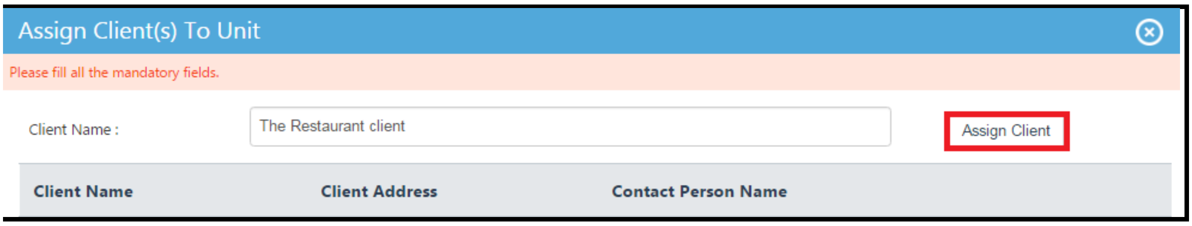


Figure 5-37

- **Step 3-** Undo changes by deleting the Client or else click on Save to save the changes for that Unit.

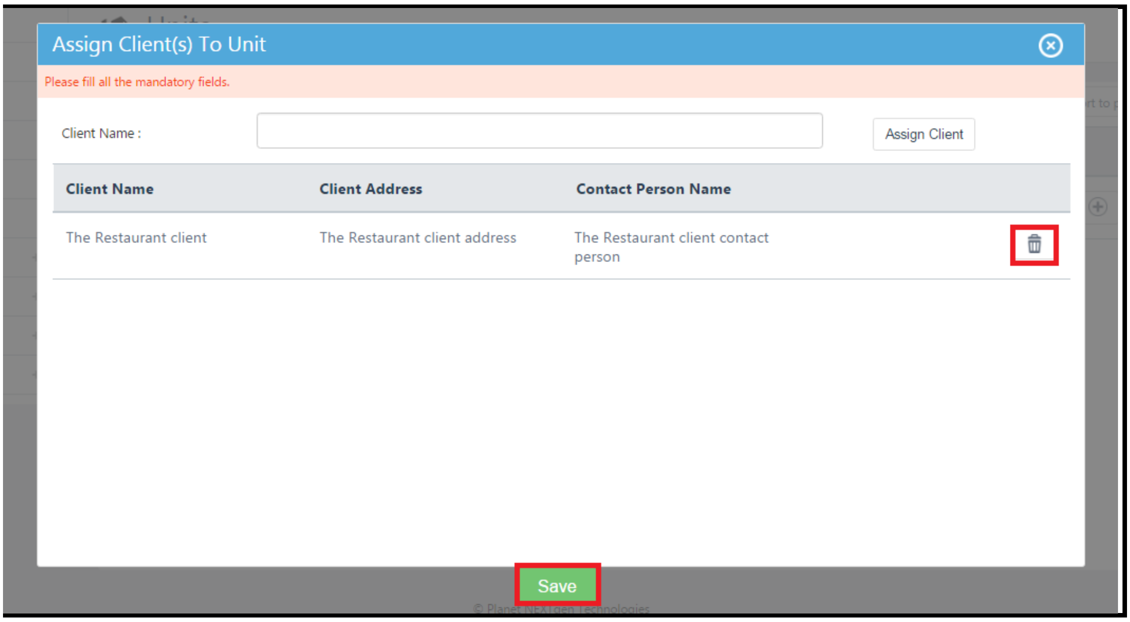


Figure 5-38

5.4.4 Assign User(s) to Unit

- Step 1- Click on (**Assign User(s) to Unit**) ⊕ icon.

Figure 5-39

- Step 2- Select **System**, **Role** and **Level** from dropdown list.

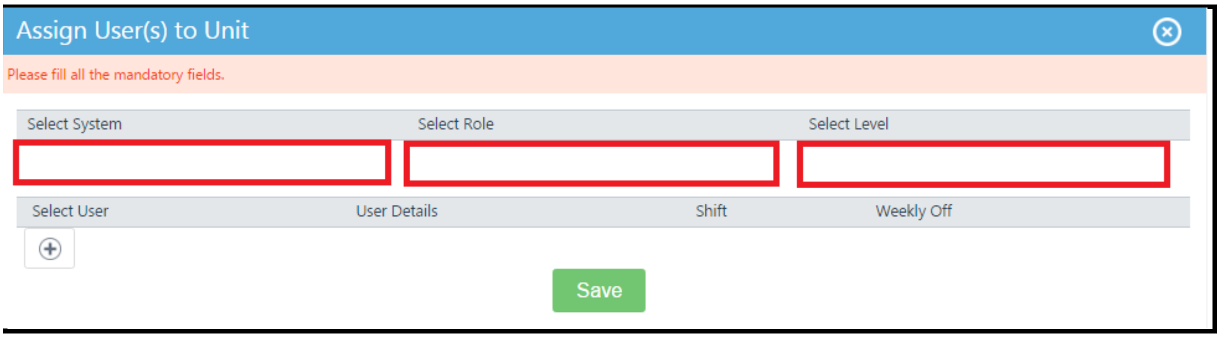


Figure 5-40

- **Step 3-** Select the **User Name** from the list of existing Users.
  Select the shift in which user is working for e.g. select "I" and in case of shift rotation, keep changing the shift here as per the Schedule.
  Select the Weekly off for the user for e.g. select "Sunday" and click on "**Save**" button to save the changes.

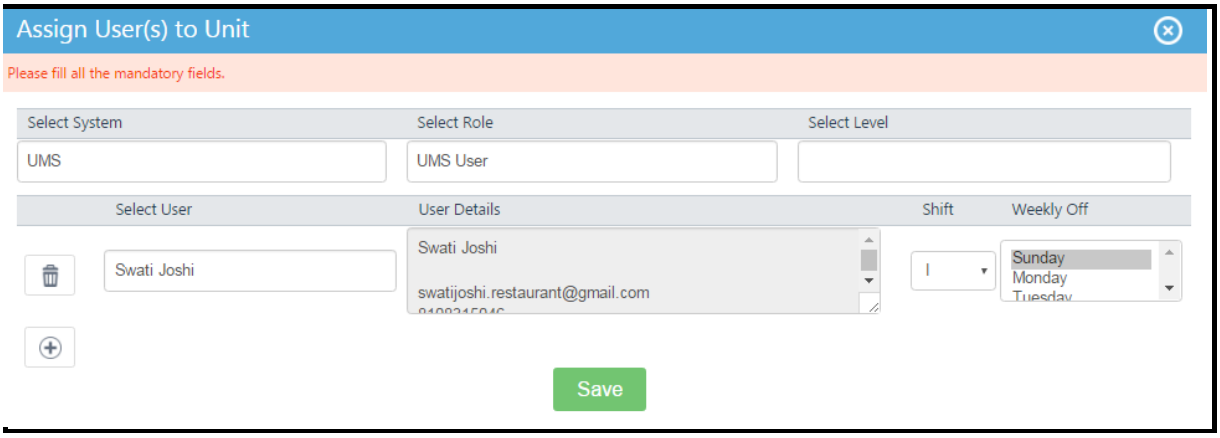


Figure 5-41

- **Step 4-** Click on the **Add** icon to assign new user and click on **Delete** icon to delete the assigned user.

Figure 5-42

5.4.5 Activate / deactivate a unit

- **Step 1** - Click on **Deactivate** button, a pop message will display as, "Are you sure you want to deactivate the Unit" with **Ok** and **Cancel** button. Select Ok to deactivate it.

Figure 5-43

- **Step 2** - Click on **Activate** button, a pop message will display as, "Are you sure you want to activate the Unit" with **Ok** and **Cancel** button. Select Ok to activate it again.

Figure 5-44

5.5 Client

- **Description**

Clients are defined as the customers or entities that use the services and products provided by your organizations. Add Clients that your company business Units cater to by giving person of contact details and billing information to allow your Units to operate more efficiently.

5.5.1 How to create a client

- **Step 1** - Click on Client.

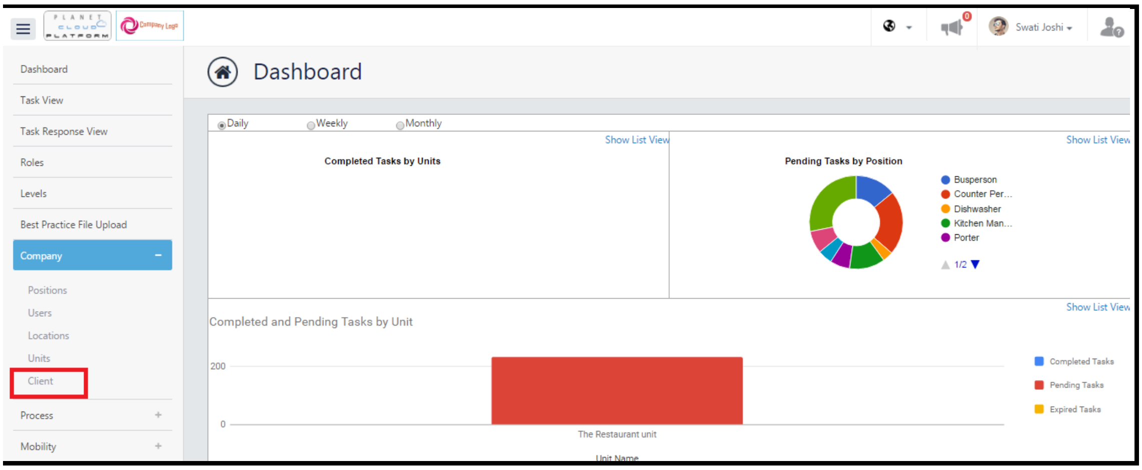


Figure 5-45

- **Step 2**- Click on Add Client button.

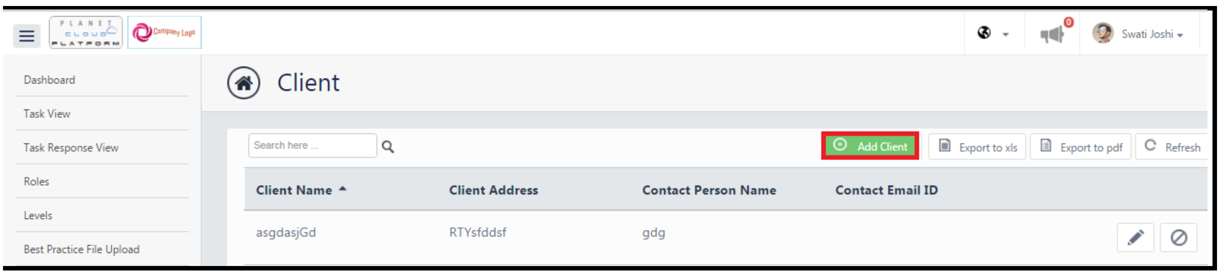


Figure 5-46

- **Step 3-** Provide all relevant details in the mandatory field (marked by *) and click on **Save** button.

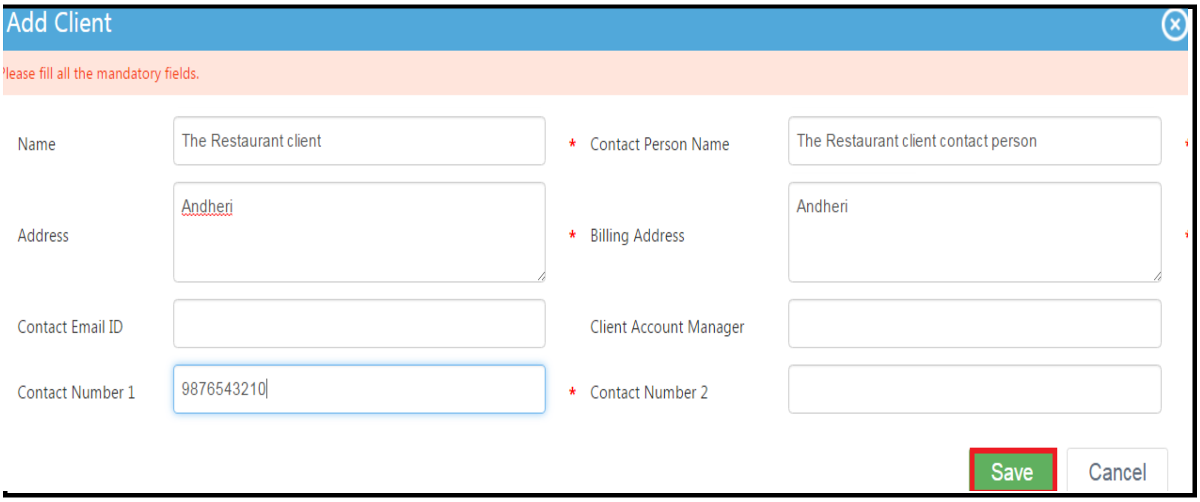


Figure 5-47

5.5.2 Edit a client

- **Step 1-** Click on (**Edit**) icon

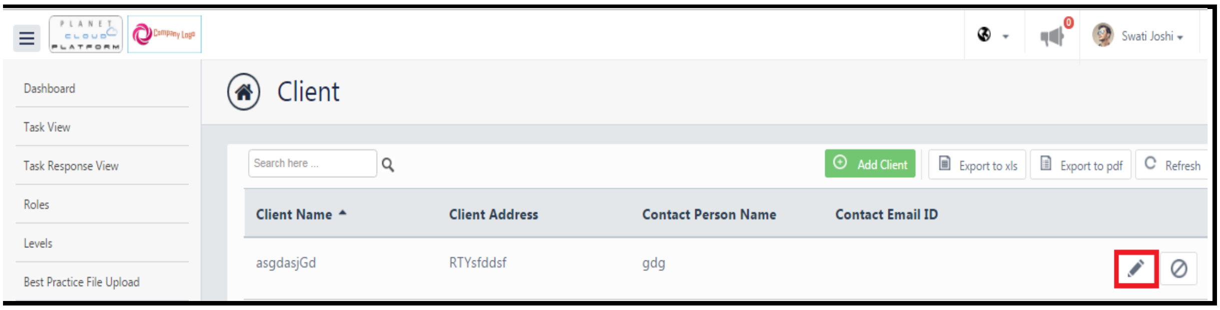


Figure 5-48

- **Step 2-** Edit the required fields and click on **Save** button to save the changes.

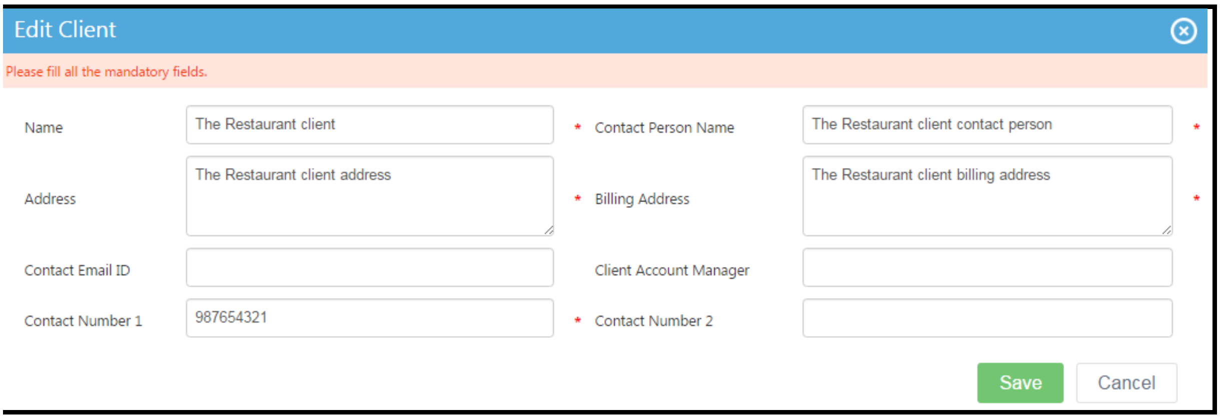


Figure 5-49

5.5.3 Activate / deactivate a client

- Step 1- Click on **Deactivate** button, a pop message will display as, “Are you sure you want to deactivate the Client” with **Ok** and **Cancel** button. Select Ok to deactivate it.

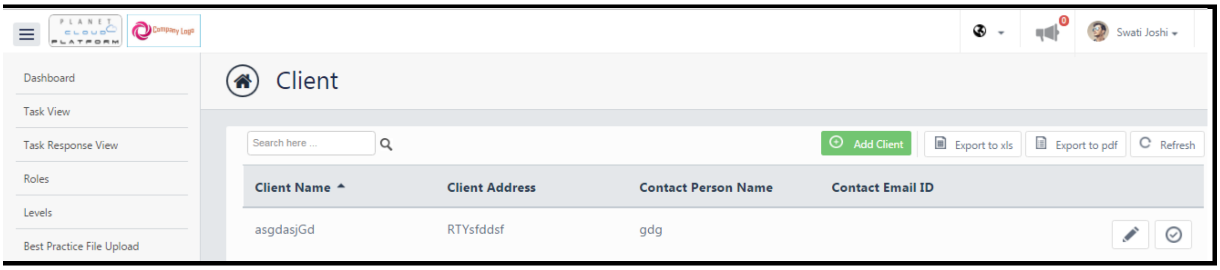


Figure 5-50

- Step 2- Click on **Activate** button, a pop message will display as, “Are you sure you want to activate the Client” with **Ok** and **Cancel** button. Select Ok to activate it again.

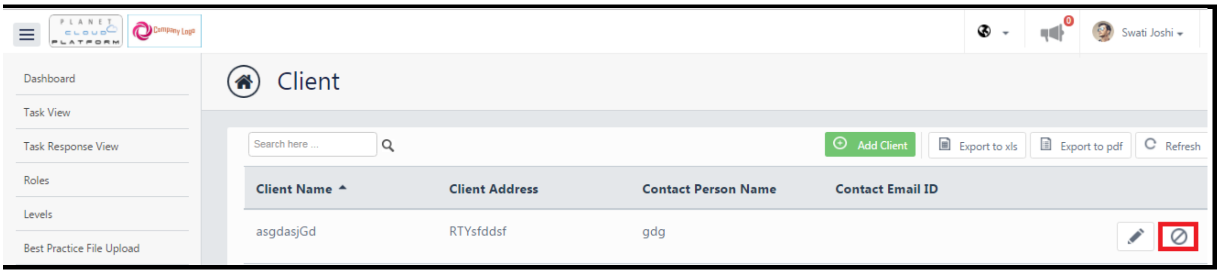


Figure 5-51

6.0 PROCESS

- **Description**

Company processes serves as a high-level, industry-neutral enterprise process model that allows organizations to see their business processes from a cross-industry viewpoint. Processes highlights the best practices standards in details for adding or editing the defaults which were uploaded in Chapter 5 using the Best Practices File Upload feature. In Figure 6-1, the Process level hierarchy is explained in detail.

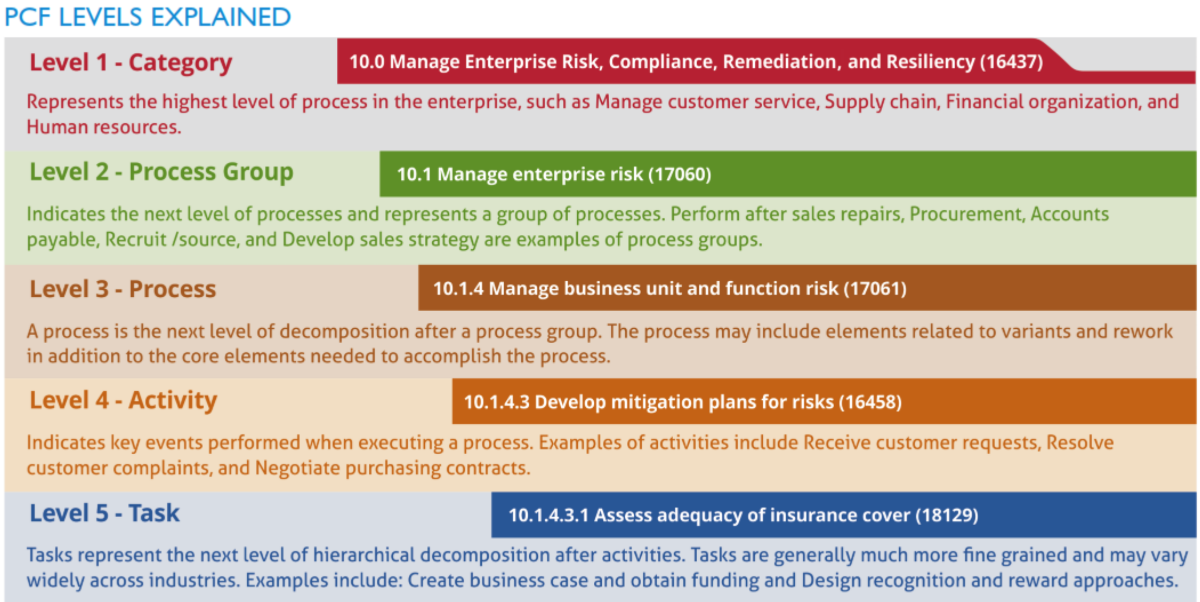


Figure 6-1

Each of these Levels mentioned can be newly created in the system, these steps are explained in the further chapters below.

6.1 Clusters

6.1.1 How to create a cluster

- **Step 1**- Click on **Clusters.**

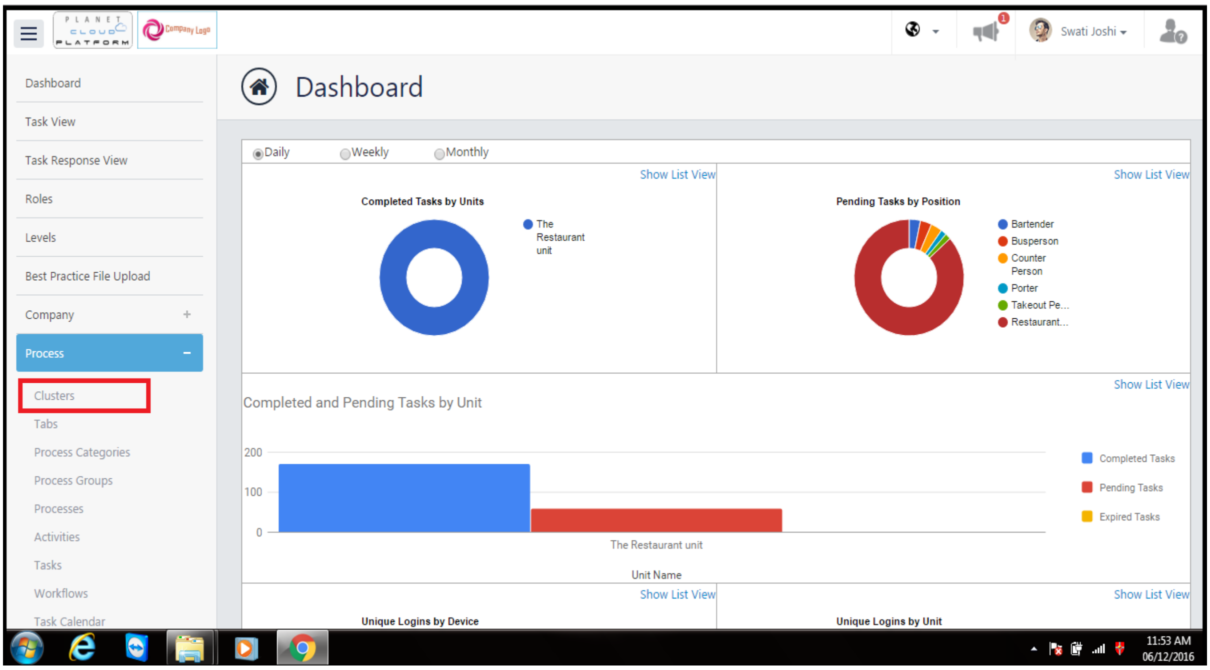


Figure 6-2

- **Step 2-** Click on **Add Cluster**

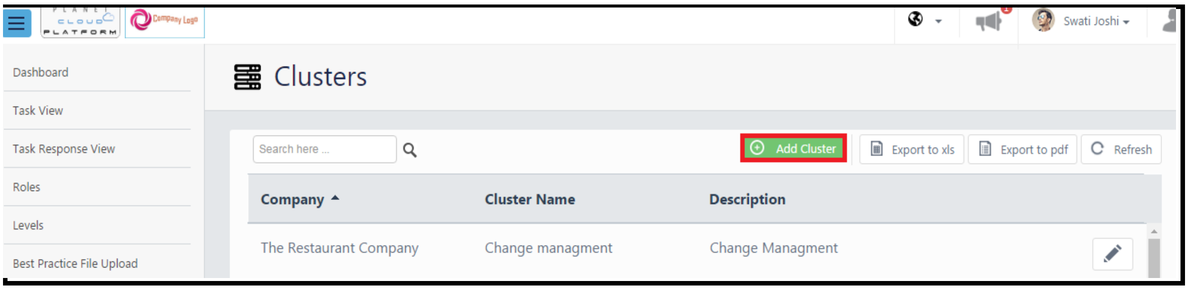


Figure 6-3

- **Step 3-** In the **Name** field, enter name of cluster and in the **Description**, enter description for cluster and hit on the **save** button.

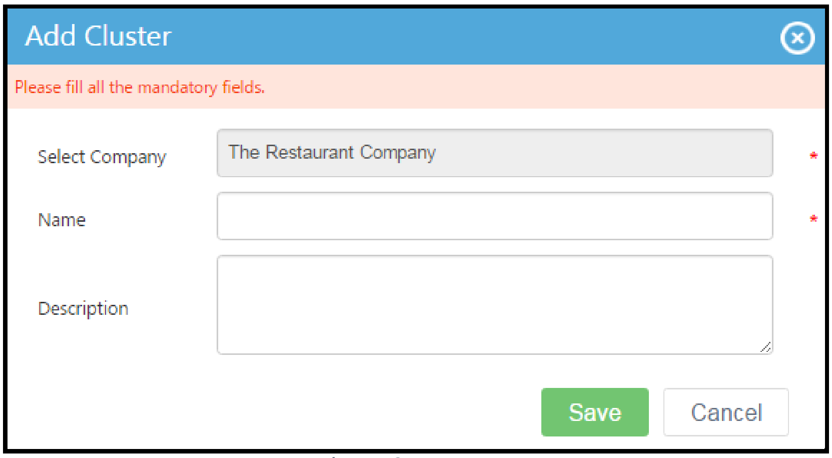


Figure 6-4

6.1.2 Edit a cluster

- **Step 1-** Click on (**Edit**) icon

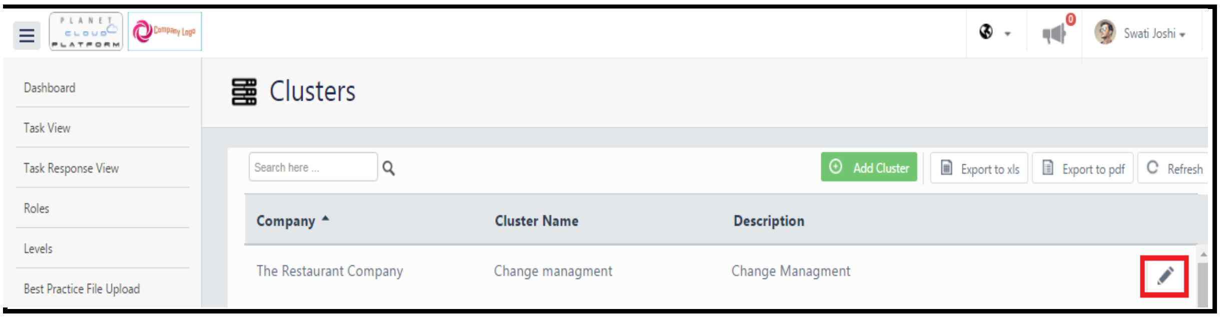


Figure 6-5

- **Step 2-** Edit the required fields and click on **Save** button to save the changes.

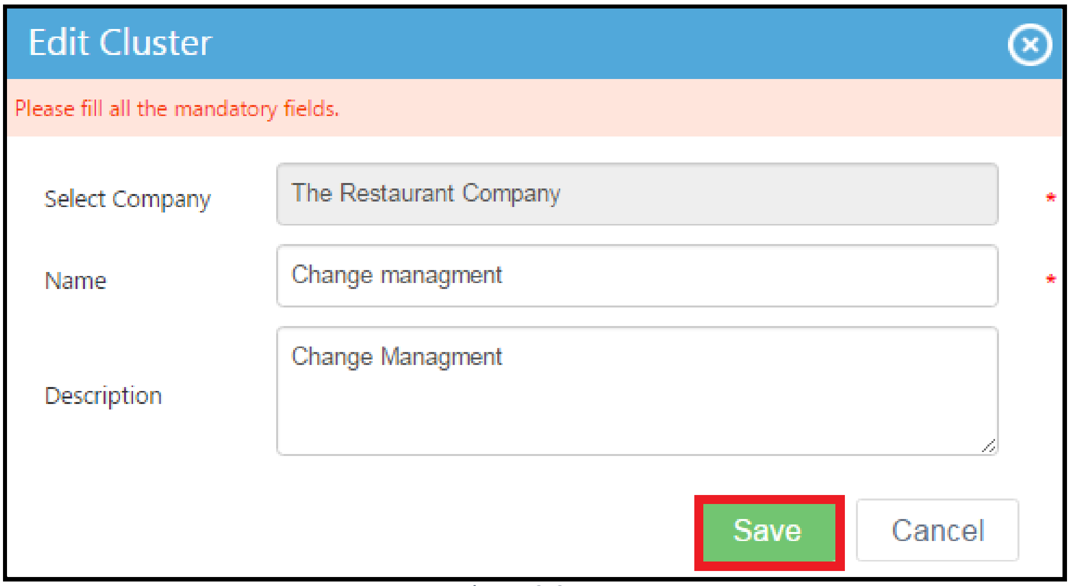


Figure 6-6

6.2 Tabs

6.2.1 How to create a tab

- **Step 1-** Click on **Tabs**.

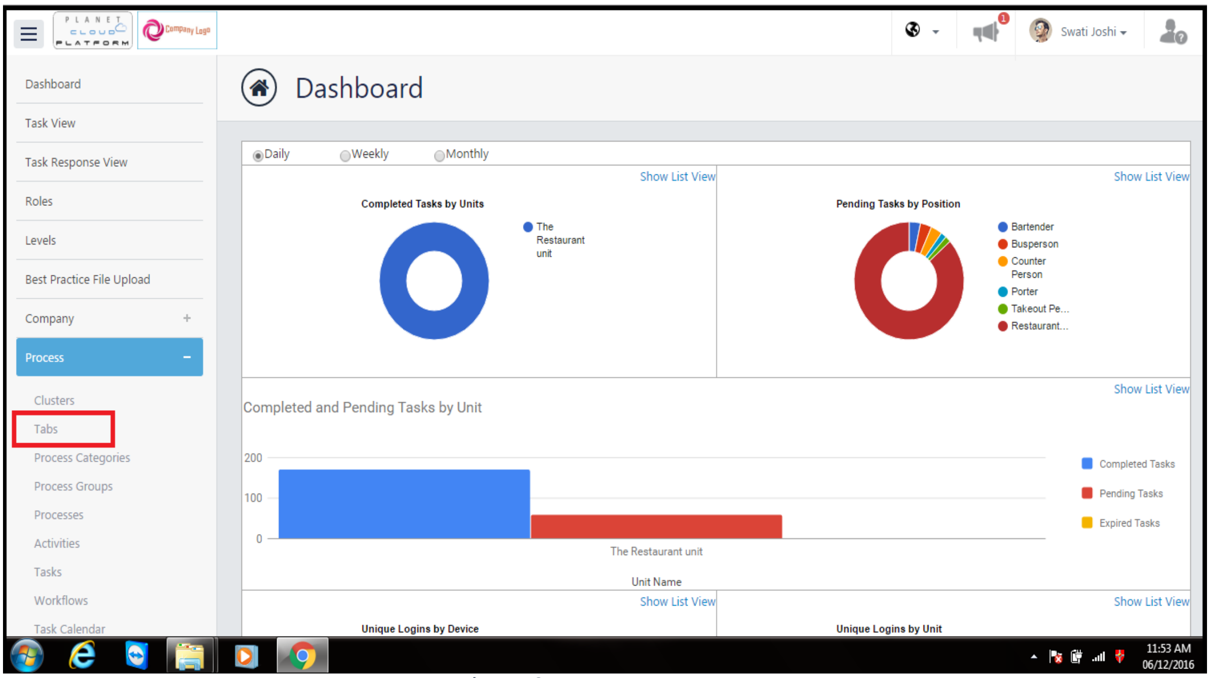


Figure 6-7

- **Step 2-** Click on **Add Tab** button.

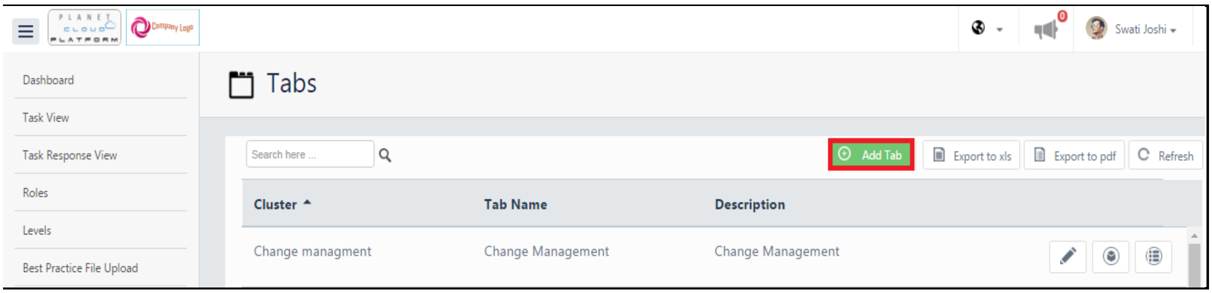


Figure 6-8

- **Step 3-** Select the desired **Cluster** from the list. For e.g., select "**Facility Related**".

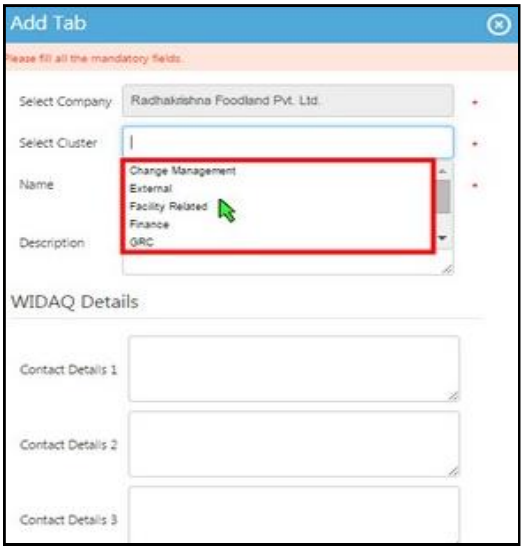


Figure 6-9

- **Step 4-** In the **Name** field, enter the Tab Name, and in the **Description** field enter the description for the tab.

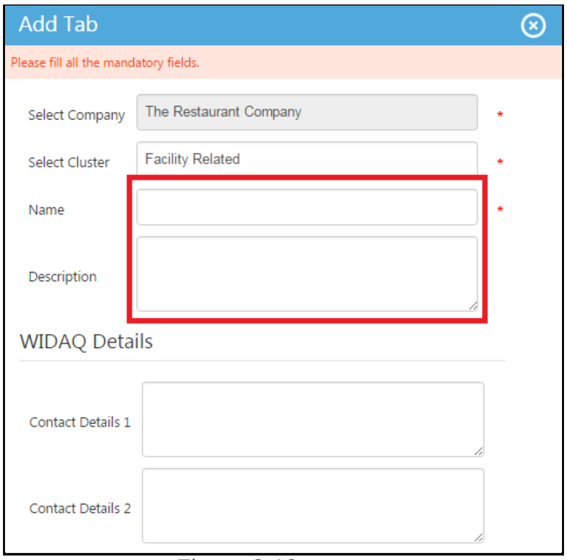


Figure 6-10

- **Step 5-** In the **Contact Details 1** field, Provide First point of contact for the TAB with the name, designation, and contact no and email address.
  In the **Contact Details 2** field, Provide Second point of contact for the TAB with the name, designation, contact no and email address.
  In the **Contact Details 3** field, Provide Third point of contact for the TAB with the name, designation, contact no and email address and click on the **save** button.

Figure 6-11

6.2.2 Edit a tab

- **Step 1-** Click on (**Edit)** icon

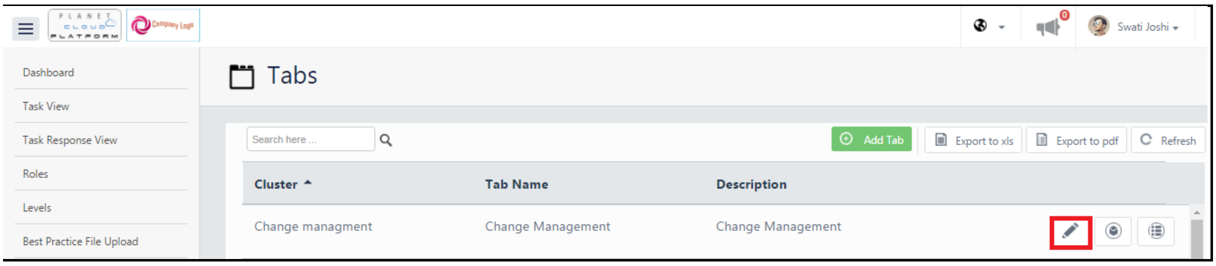


Figure 6-12

- **Step 2**- Edit the fields you desire from the options shown in the window.(Figure 6-13)

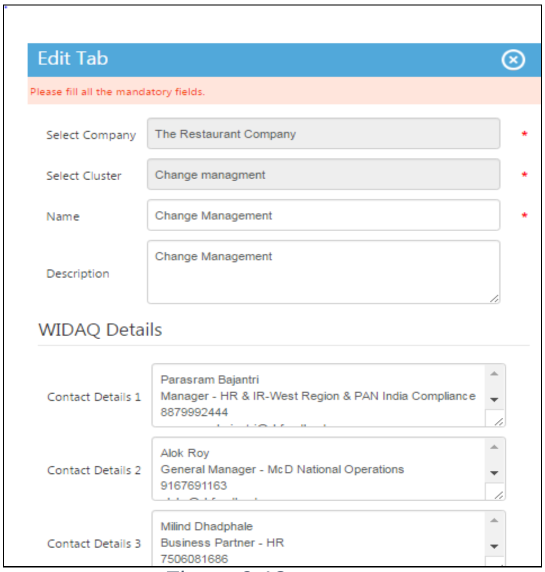


Figure 6-13

6.2.3 Assign Tab Module to Tab

Tabs modules are a level down of detail from Tabs that work the same way as Tabs, put provide finer categorization of the Tasks assigned to each User/employee based on their positions. For e.g. The Finance tab can be split into finer Tab Modules such as, Taxes, Invoicing, and Order Records etc.

- **Step 1-** Click on (**Assign tab module to tab**) icon.

Figure 6-14

- **Step 2-** Click on **Add** icon, to assign new tab module to tab and click on **Delete** icon, to delete the assigned tab module and click on **Save** button to save the changes.

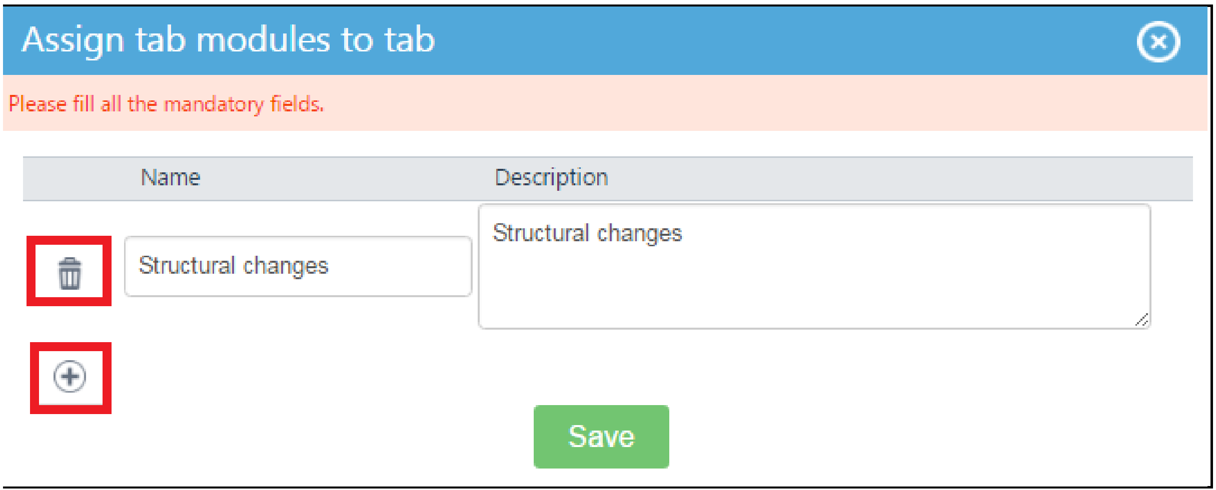


Figure 6-15

6.2.4 Assign Tab Action to Tab Module

Tab Actions are media files associated with that respective Tab modules within the Tabs which helps the User in visual aid while performing the Task assigned to that particular Tab Module for e.g. For Taxes tab modules in a Finance tab, we can assign tab actions such as Income Tax guidelines, Forms for employees, Reports of previous Tax returns etc. Tab Actions come in 4 forms:

1) **Checklists:** A list of to-do items in a particular order which need to be performed and checked off as they are completed. These needs to be in a .PDF format.
2) **Forms:** Forms can be either How-to do documents or step by step illustrations regarding the tasks in that particular tab module. Forms can either be a PDF document or an image.
3) **Manuals:** Detailed step-by-step instructions in a document, video or image format are added under Manuals.
4) **Reports:** If the tab module has tasks concerning report generation, then sample reports or previously generated reports are added here to illustrate and guide creation of similar reports. These can also either .PDF files or images.
5) **Process:** Also knowns SOPs or Standard Operating Procedures, these are documents of instructions compiled by an organization to help workers carry out routine operations. SOPs aim to achieve efficiency, quality output and uniformity of performance, while reducing miscommunication and failure to comply with industry regulations.

- **Step 1-** Click on (**Assign tab action to tab module**)  icon.

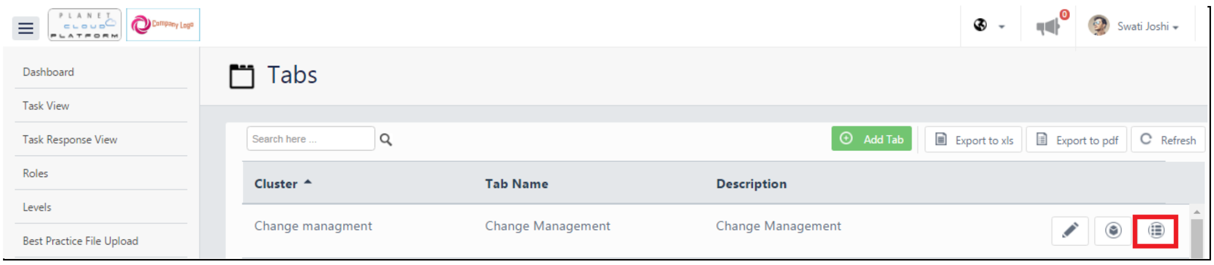


Figure 6-16

- **Step 2-** Select the module name for which you want to upload the help documents for e.g., select "**Structural change**" and in the **Number of inputs** field, enter the number of tab actions you wanted to assign to tab module for e.g., enter "**2**" and hit on **Add** button.

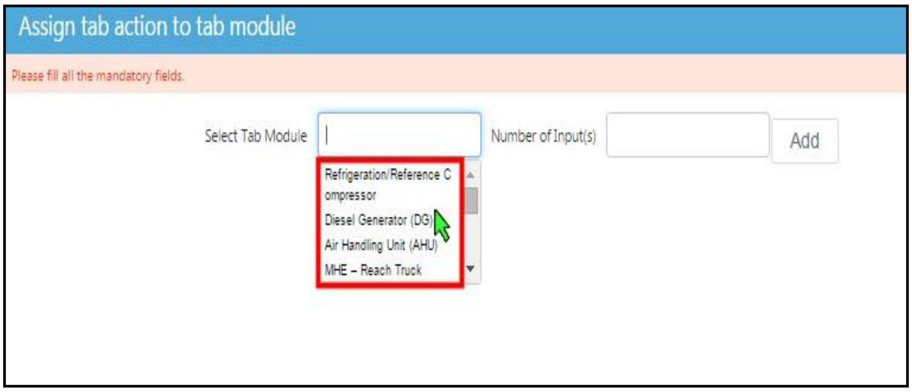


Figure 6-17

- **Step 3- Fill the following details as given below:**
  - Click on **Tab Action Type,** select the desired action type from the list. For e.g., select "**Forms**".
  - In the **Name** field, enter the name of document.
  - **In the Description** field, enter the description for the document**.**
  - In the **File Name**, Provide the file path name (i.e. Server path name where the original file is stored).
  - Click on **Type**, select PDF Option if the file is saved in PDF form or select image.
  - Click on **Save** button.
  - Click on **Add** button to add new tab action and click on **Delete** button to delete the assigned tab action

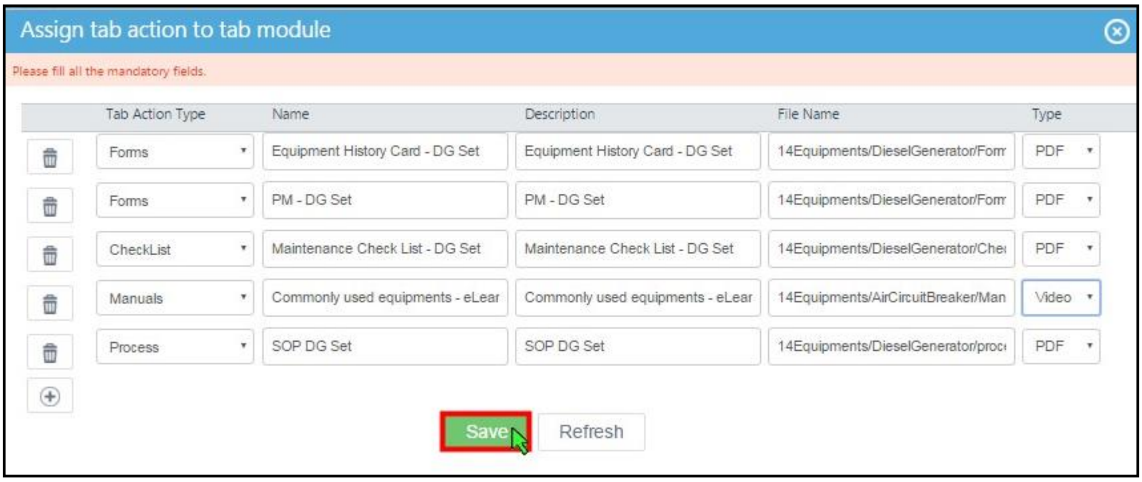


Figure 6-18

6.3 Process categories

6.3.1 How to create a process categories

- **Step 1-** Click on **Process Categories.**

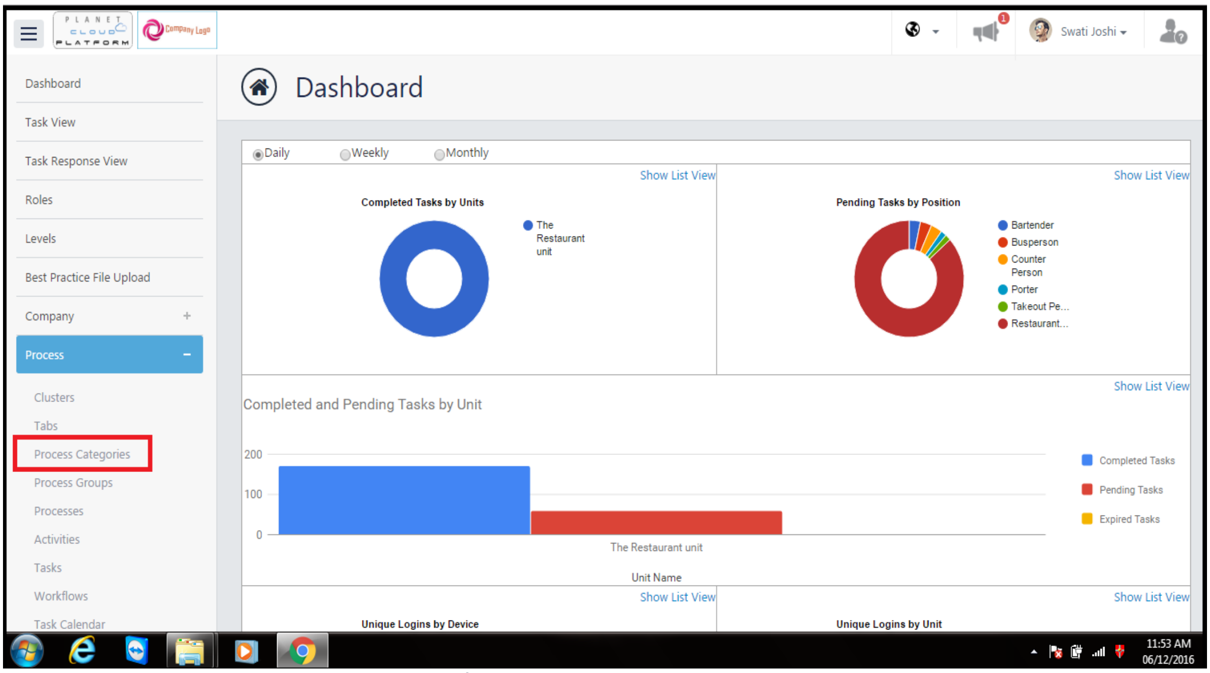


Figure 6-19

- **Step 2-**Click on **Add Process Category** button.

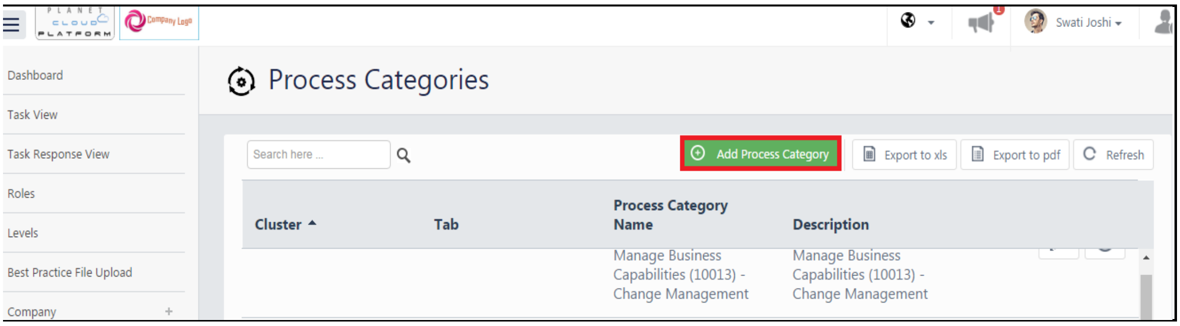


Figure 6-20

- **Step 3-** Click on **Cluster** field, select the desired **Cluster** from the list. For e.g. Select "**Change Management** and Click on Tab field, select the desired **Tab** from the list. For e.g., select "**Change Management.**

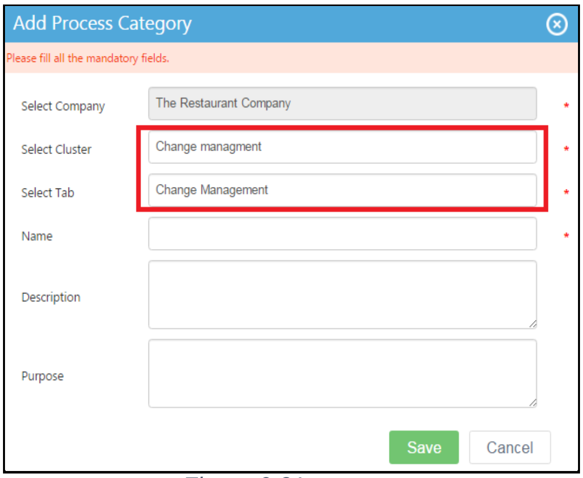


Figure 6-21

- **Step 4**- In the **Full Name** field, enter the Process Category name and in the description enter description for Process Category

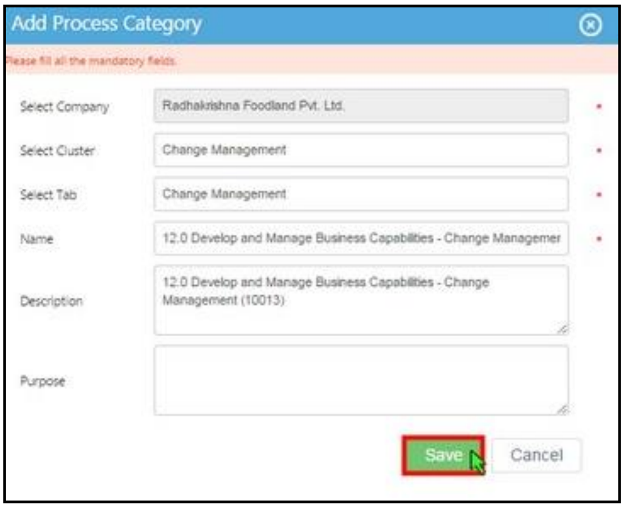


Figure 6-22

6.3.2 Edit a process categories

- **Step 1-** Click on (**Edit**) icon

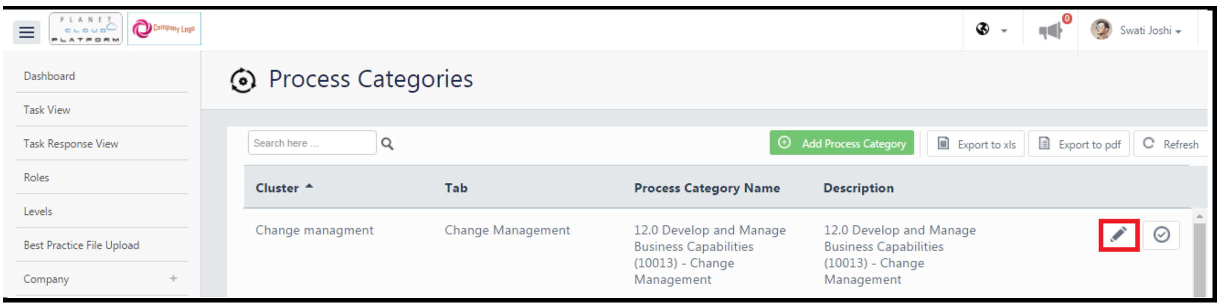


Figure 6-23

- **Step 2-** Edit the required fields and click on **Save** button to save the changes.

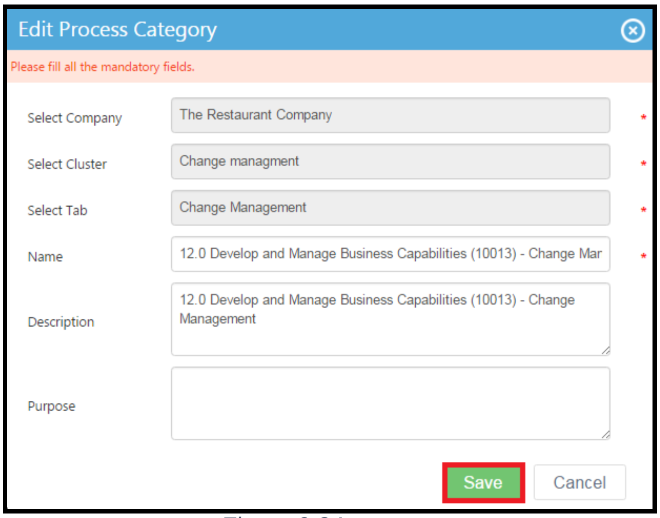


Figure 6-24

6.3.3 Activate / deactivate a process categories

- **Step 1**- Click on A**ctivate** button, a pop message will display as, “Are you sure you want to deactivate the Process Category” with **Ok** and **Cancel** button. Select Ok to deactivate it.

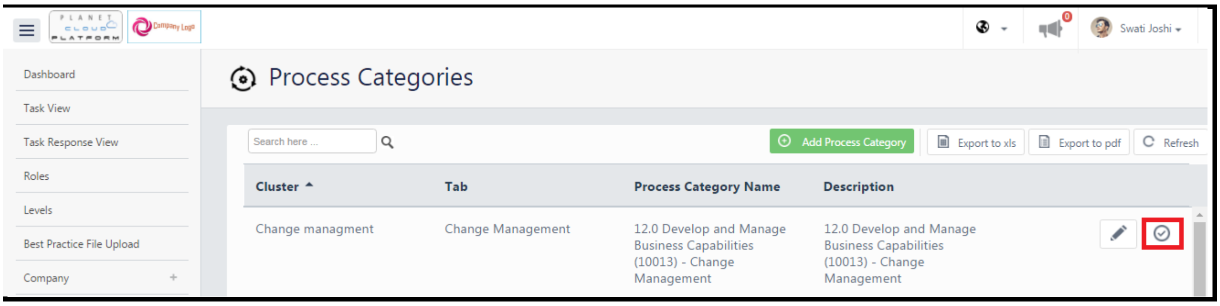


Figure 6-25

- **Step 2**- Click on **Deactivate** button, a pop message will display as, “Are you sure you want to Activate the Process Category” with **Ok** and **Cancel** button. Select Ok to deactivate it.

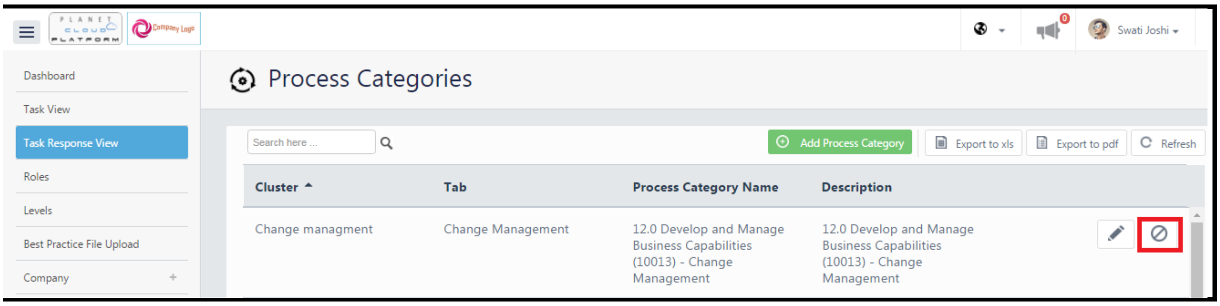

Process Categories
Dashboard
Task View
Task Response View
Roles
Levels
Best Practice File Upload
Company
Swati Joshi
Search here ...
Add Process Category
Export to xls
Export to pdf
Refresh
Cluster
Tab
Process Category Name
Description
Change managment
Change Management
12.0 Develop and Manage Business Capabilities (10013) - Change Management
12.0 Develop and Manage Business Capabilities (10013) - Change Management

Figure 6-26

6.4 Process Group

6.4.1 How to create a process group

- **Step 1-** Click on **Process Groups.**

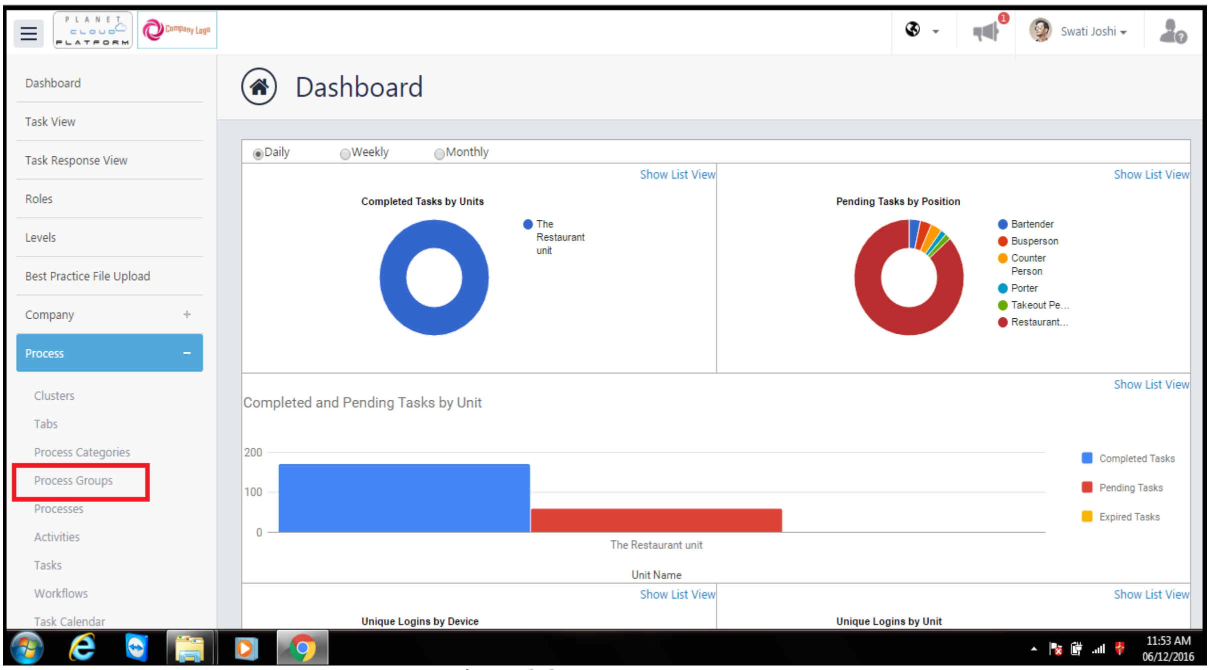


Figure 6-27

- **Step 2-** Click on **Add Process Group**.

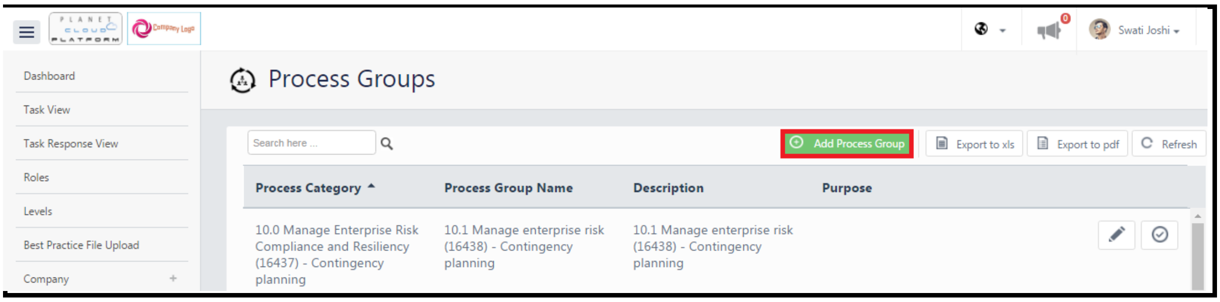


Figure 6-28

- **Step 3-** Click on **Process Category**, select the desired process category from dropdown list.

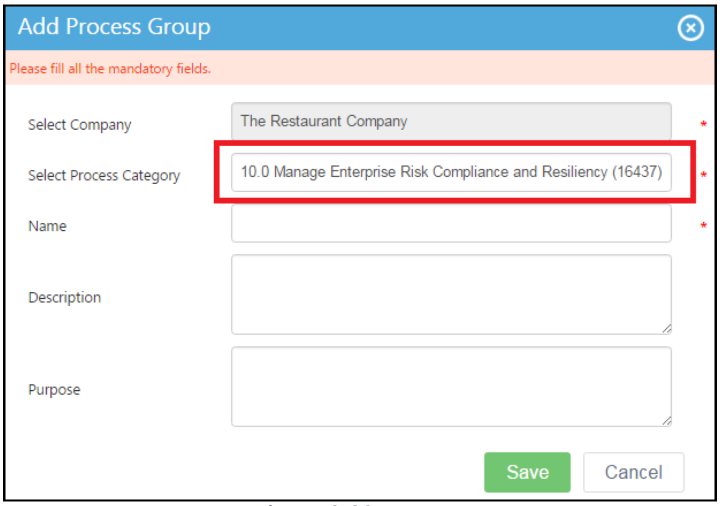


Figure 6-29

- **Step 4-** In the **Name** field, enter name of process group and in the **Description**, enter description for process group and hit on the **save** button.

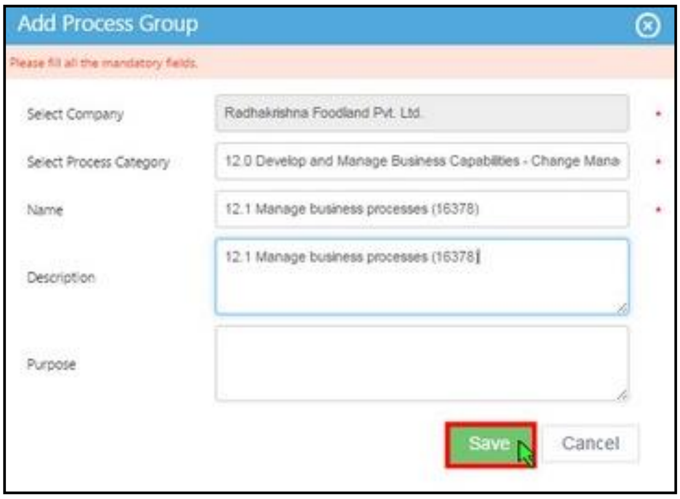


Figure 6-30

6.4.2 Edit a process group

- **Step 1-** Click on **(Edit)** icon

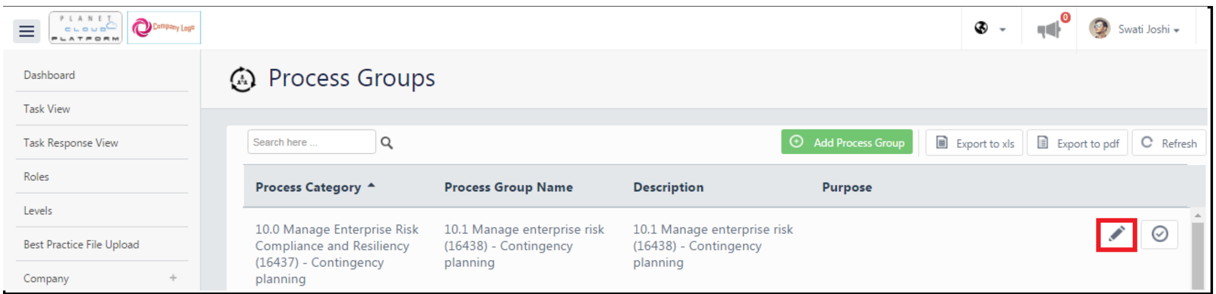


Figure 6-31

- **Step 2-** Edit the fields you desire from the options shown in the window.(Figure 6.31)

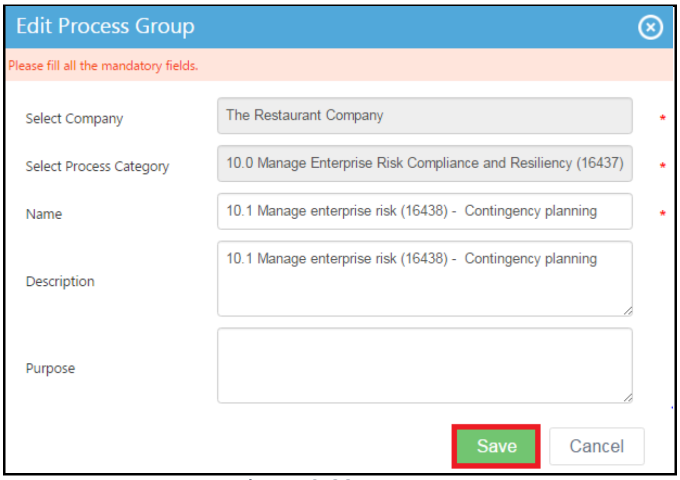


Figure 6-32

6.4.3 Activate / deactivate a process group

- **Step 1**- Click on A**ctivate** button, a pop message will display as, "Are you sure you want to deactivate the Process Group" with **Ok** and **Cancel** button. Select Ok to deactivate it.

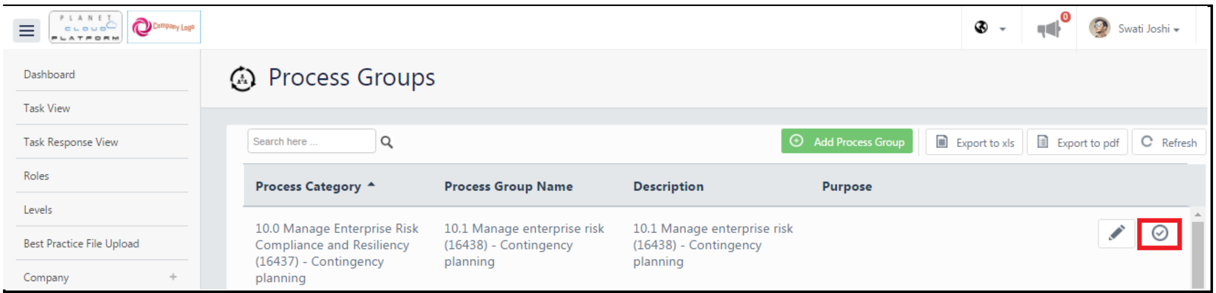


Figure 6-33

- **Step 2**- Click on **Deactivate** button, a pop message will display as, "Are you sure you want to activate the Process Group" with **Ok** and **Cancel** button. Select Ok to deactivate it.

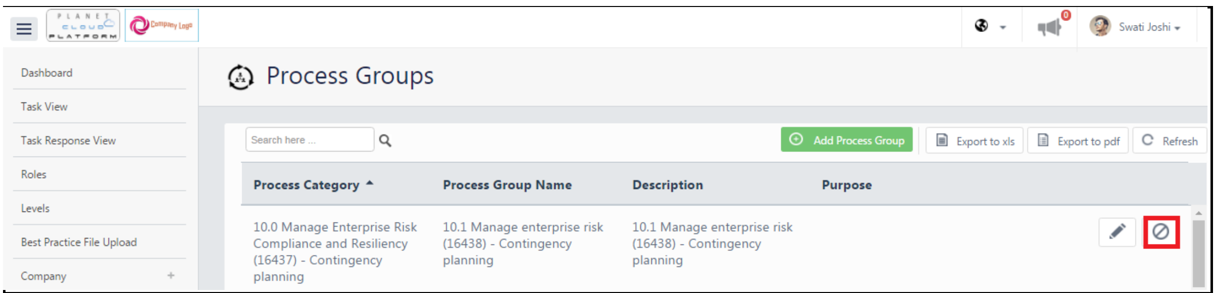


Figure 6-34

6.5 Processes

6.5.1 How to create a process

- **Step 1-** Click on **Processes.**

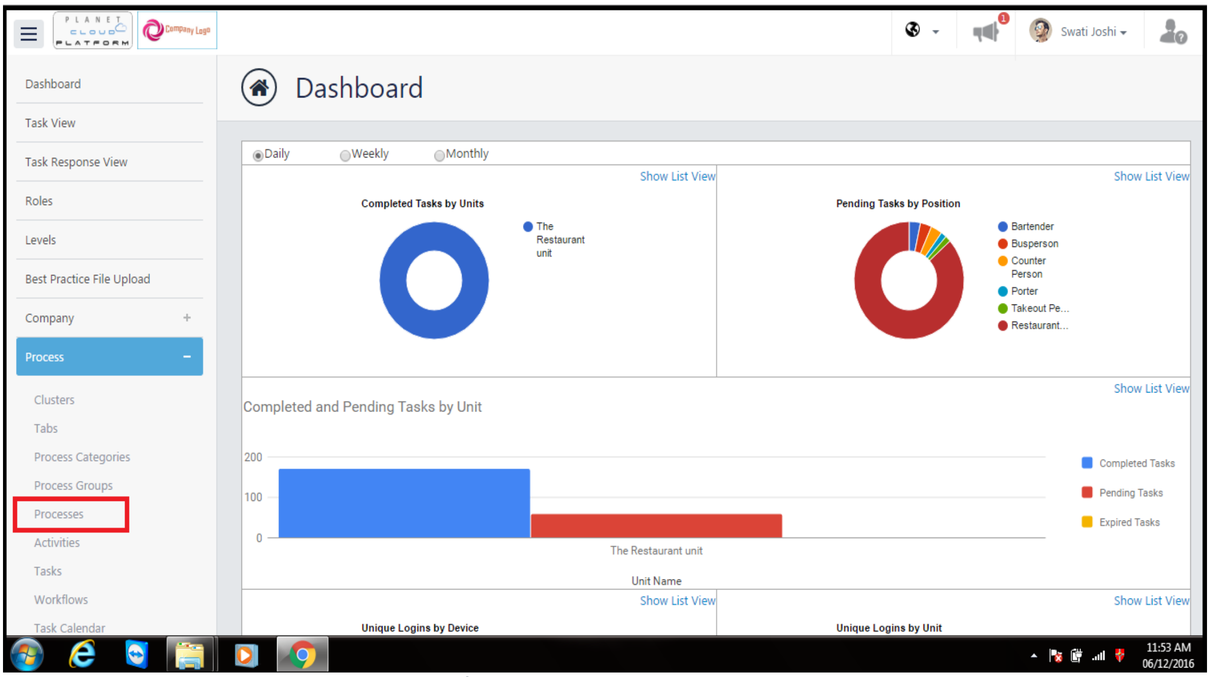


Figure 6-35

- **Step 2**- Click on **Add Process.**

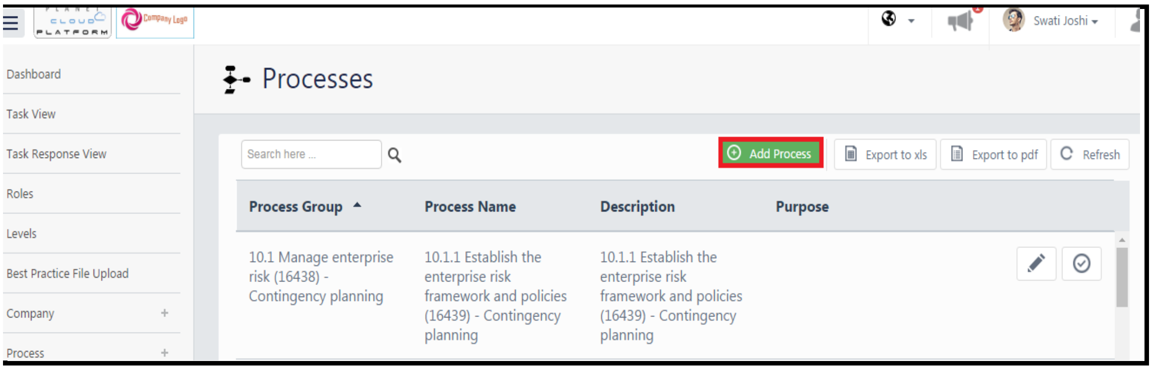


Figure 6-36

- **Step 3-** Fill in the following as given below:
  - Click on **Process Group**, select the desired process group from dropdown list
  - In the **Name** field, enter name of process
  - In the **Description**, enter description for process
  - Hit on the **save** button.

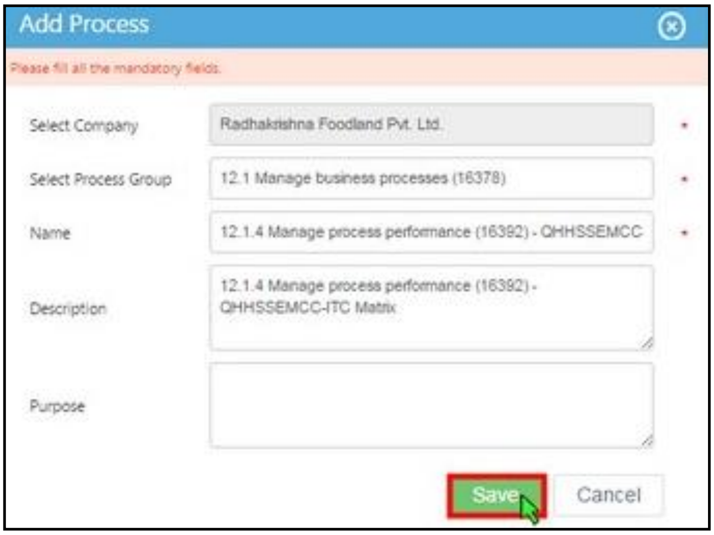


Figure 6-37

6.5.2 Edit a process

- **Step 1-** Click on (**Edit**) icon

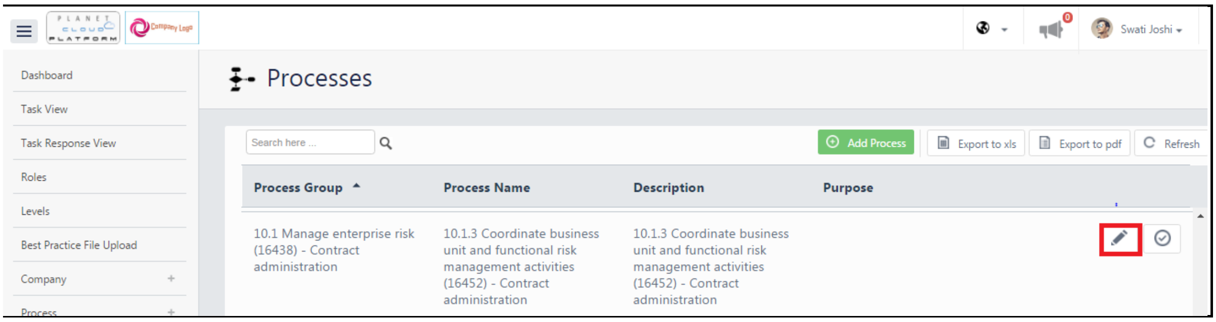


Figure 6-38

- **Step 2 –** Edit the desired fields according to the changes to be made in the window.

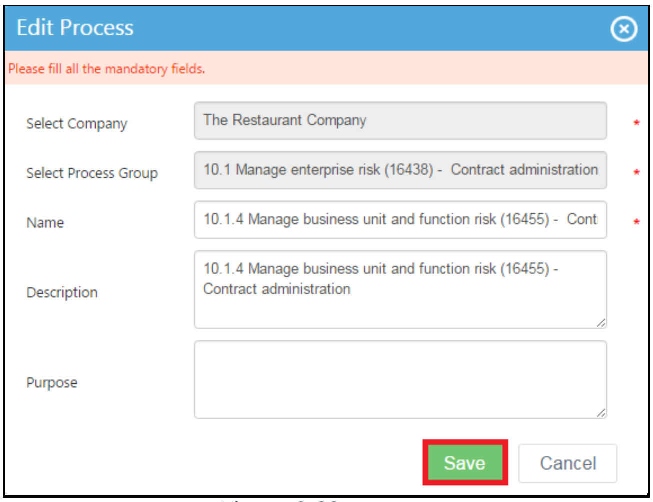


Figure 6-39

6.5.3 Activate / deactivate a process

- **Step 1**- Click on **Deactivate** button, a pop message will display as, “Are you sure you want to activate the Process” with **Ok** and **Cancel** button. Select Ok to activate it.

Figure 6-40

- **Step 2**- Click on A**ctivate** button, a pop message will display as, "Are you sure you want to deactivate the Process Group" with **Ok** and **Cancel** button. Select Ok to deactivate it.

Figure 6-41

6.6 Activities

6.6.1 How to create a Activity

- **Step 1-** Click on **Activities.**

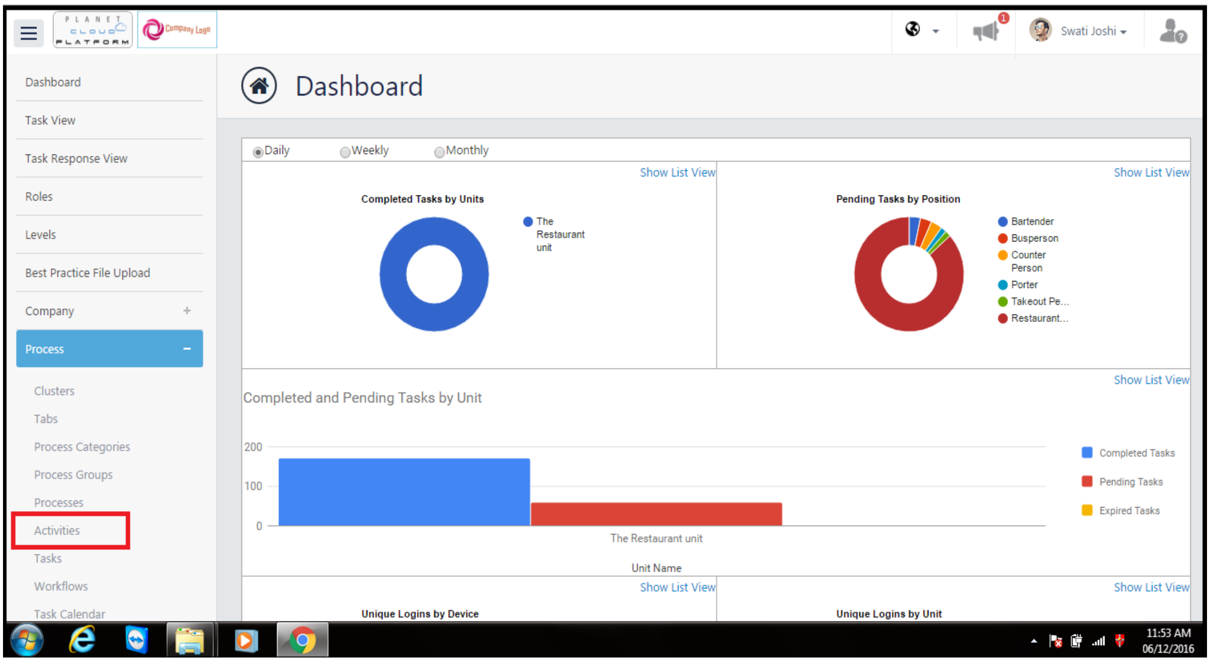


Figure 6-42

- **Step 2**- Click on **Add Activity**.

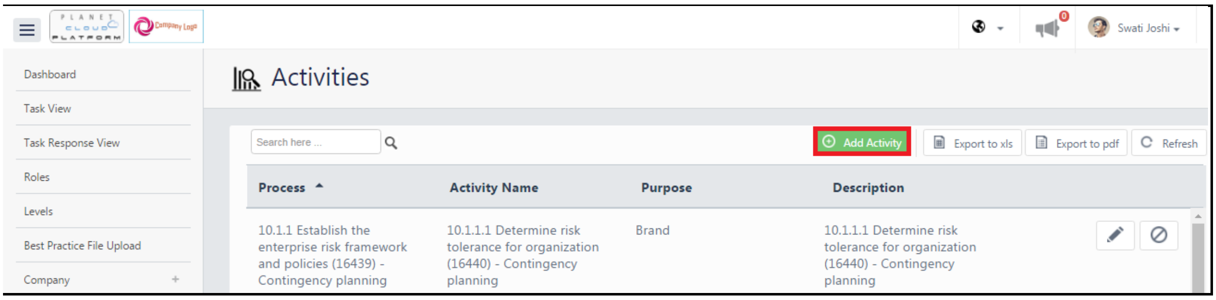


Figure 6-43

- **Step 3-**Fill in the following as given below
  - Click on **Process Group**, select the desired process group from dropdown list
  - In the **Name** field, enter name of process
  - In the **Description**, enter description for process
  - Hit on the **save** button.

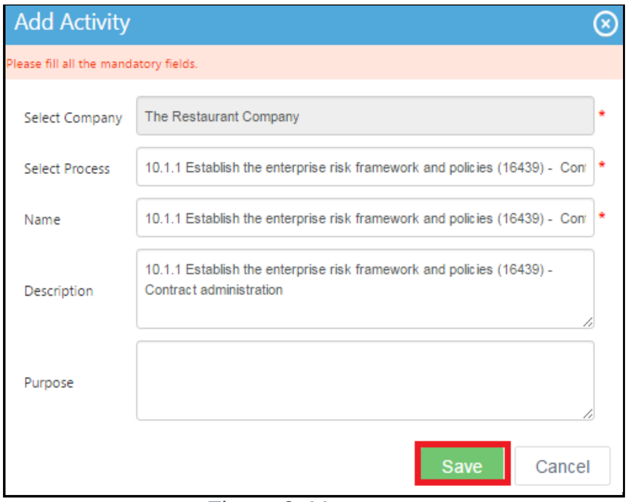


Figure 6-44

6.6.2 Edit a Activity

- **Step 1-** Click on (**Edit**) icon

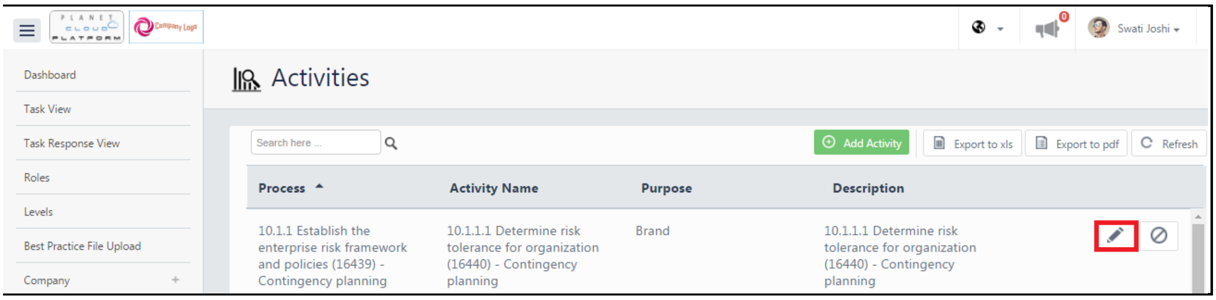


Figure 6-45

- **Step 2 –** Edit the desired fields according to the changes to be made in the window.

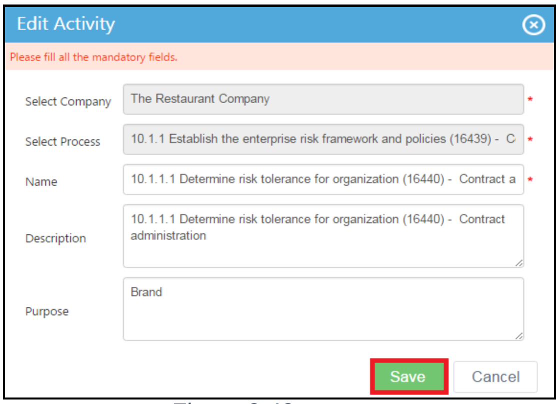


Figure 6-46

6.6.3 Activate / deactivate a Activity

- **Step 1**- Click on **Activate** button, a pop message will display as, “Are you sure you want to deactivate the Activity” with **Ok** and **Cancel** button. Select Ok to deactivate it.

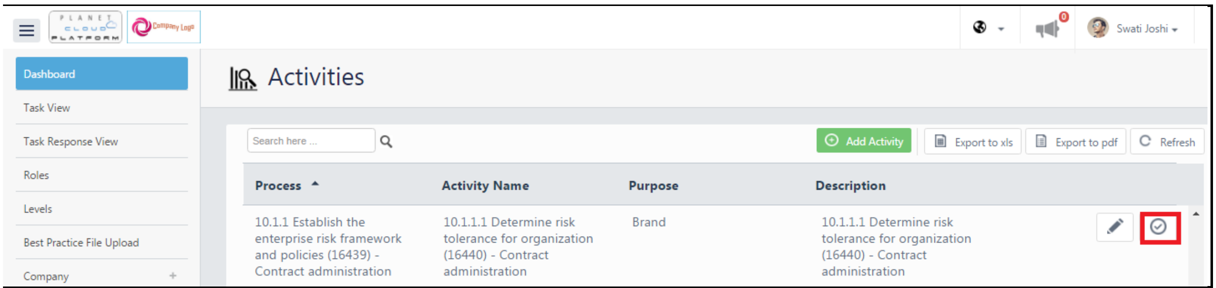


Figure 6-47

- **Step 2**- Click on Dea**ctivate** button, a pop message will display as, “Are you sure you want to activate the Activity” with **Ok** and **Cancel** button. Select Ok to activate it.

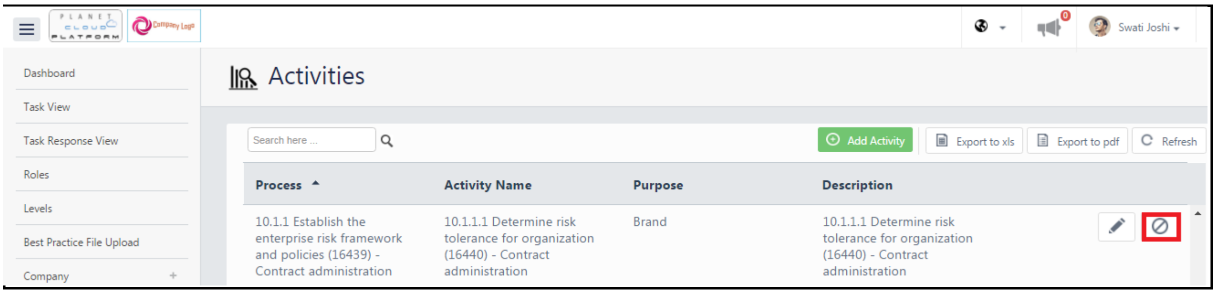

Swati Joshi
Dashboard
Task View
Task Response View
Roles
Levels
Best Practice File Upload
Company
Activities
Search here ...
Add Activity
Export to xls
Export to pdf
Refresh
Process
Activity Name
Purpose
Description
10.1.1 Establish the enterprise risk framework and policies (16439) - Contract administration
10.1.1.1 Determine risk tolerance for organization (16440) - Contract administration
Brand
10.1.1.1 Determine risk tolerance for organization (16440) - Contract administration

Figure 6-48

6.7 Tasks

- **Description**

Tasks are the actual work to be done by the employee assigned to it, these are actions that are performed regularly. Each Task is linked to the Tab Module and Activity related to it and assigned accordingly to users based on Responsible and Lead positions. Every task has a set of default and custom Task responses that the assigned position has to fill in as it is being completed by them. This enables higher hierarchy positions to manage them efficiently. Tasks in the UnitX Pro system are usually added in the system using a single prepared spreadsheet file as it helps in organization and scheduling of each tasks in a single step (Refer Section 6.9.2). Additional tasks or edits can be done using the steps given below

6.7.1 How to create a Task

- **Step 1**- Click on **Tasks**

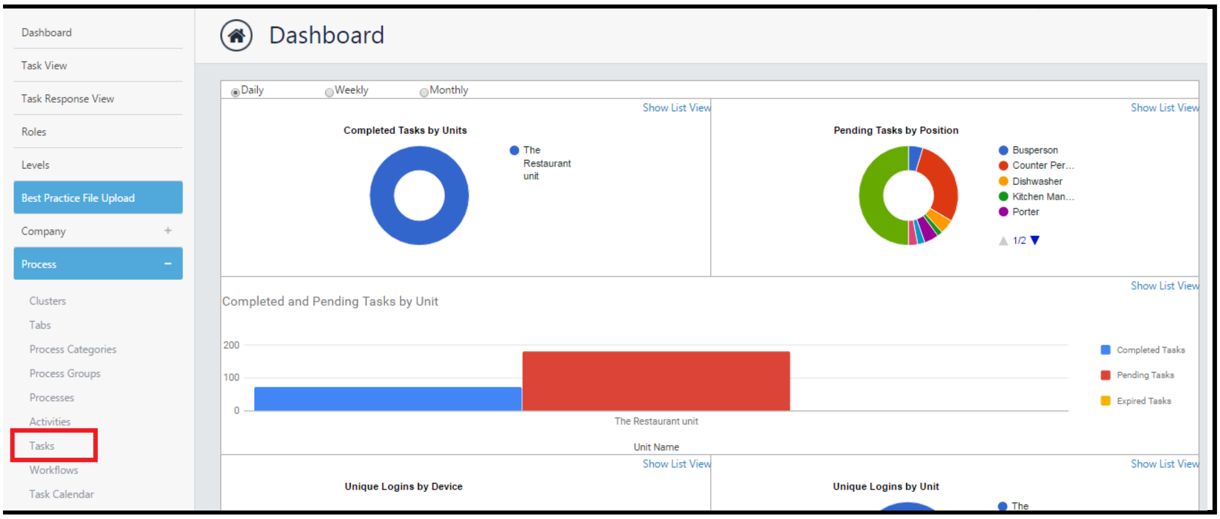


Figure 6-49

- **Step 2**- Click on **Add Task**

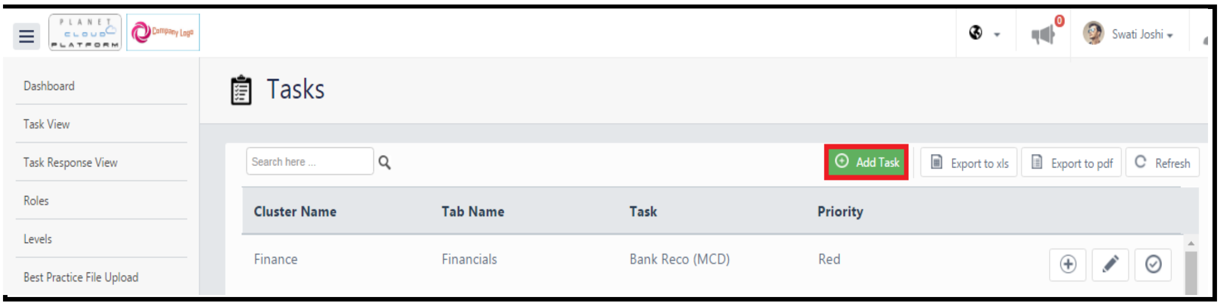


Figure 6-50

- **Step 3-** Fill in the following as given below
  - In the Select **Cluster** field, select the desire Cluster from the list. For e.g., select "**Finance**"
  - Click in the **Select Tab** field, select the desire Tab from the list. For e.g., select "**Financials**"
  - Click in the Select Tab Module, Select the desired Tab Module from the list. For e.g., select "**Petty Cash**".
  - Click in the **Select Activity** field, Select the desired Activity from the list. For e.g., select "**8.7.2.1**"
  - In the **Task** field, enter the Task Name.
  - In the **Description** field, enter the description for the task
  - Click in the **Tolerance Level** field and Provide Tolerance Level as per Department Head instructions. Tolerance level is the no. of days required to complete the task.
  - In the **Budgeted cost**, provide value for budgeted cost if any or else enter"0".
  - Select **Priority** from dropdown list. Select **Red** if the task is High Priority, **Amber** for Medium Priority task and **Blue** for Low Priority task. (Red is to be selected if the task has Zero Tolerance, if the task has tolerance level between 1 to 5 select Amber and for any task with tolerance level of more than 5 select Blue.)
  - Select the desired **Shift** from the list
  - Select the desired **Type** from the list (If the task to be done at the start of the day then select "**Opening**" or at the end of the day select "**Closing**")
  - Select the desired **Frequency** from the list.
  - In the **Risk Associated** field, enter the Risk associated with the task if not done or delayed. For e.g., "**Impact on the Cash Management**".
  - In the **Penalty** field, enter the penalty for the task not done and if expired.
  - In the **Time Duration (in Hrs)** field, enter the Duration required to complete the task in HRS.
  - In the **Event Type,** select whether the task is controllable or uncontrollable from dropdown list.
  - Click on the **Save** button.

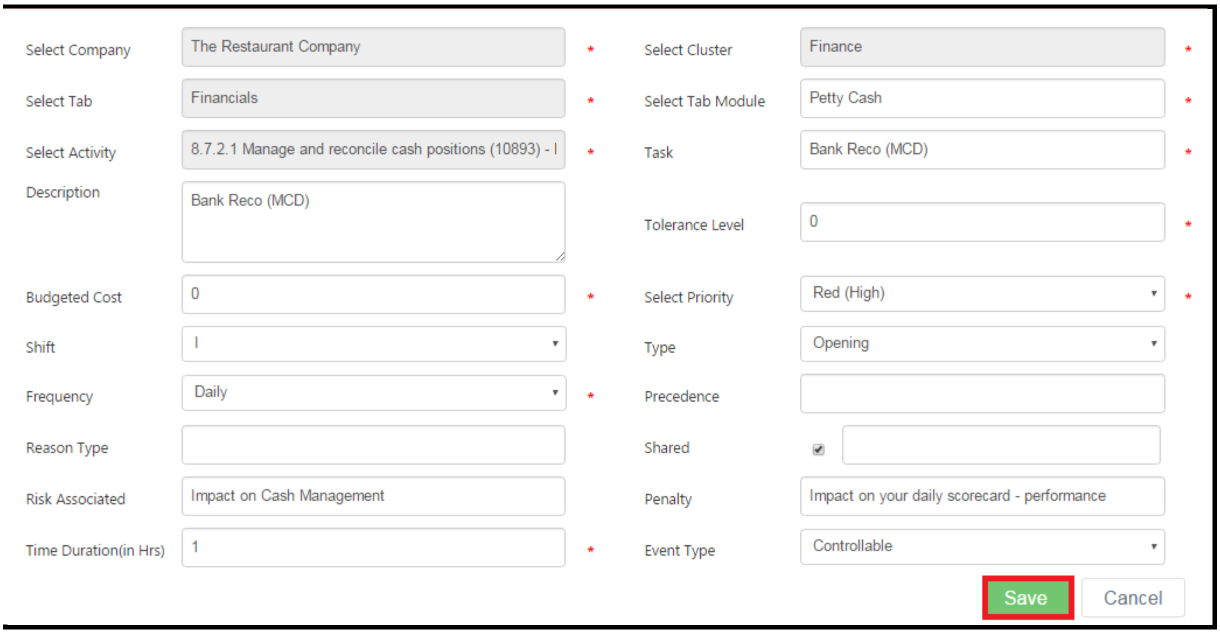


Figure 6-51

6.7.2 Edit a Task

- **Step 1-** Click on (**Edit**) icon

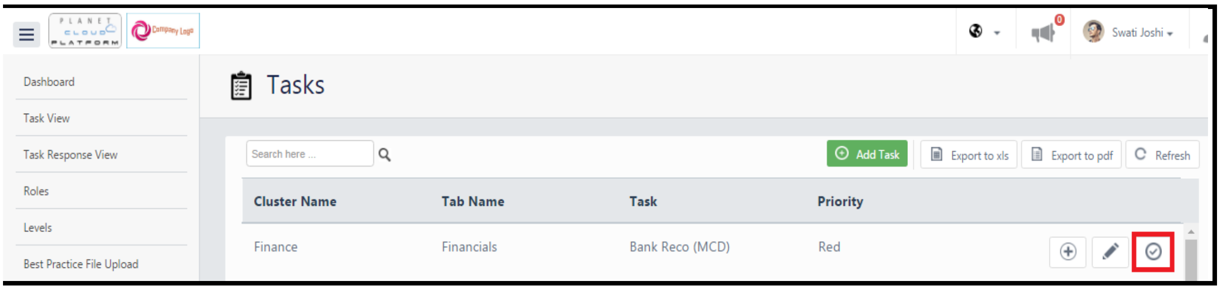


Figure 6-52

- **Step 2-** Edit the desired fields according to the changes to be made in the window.

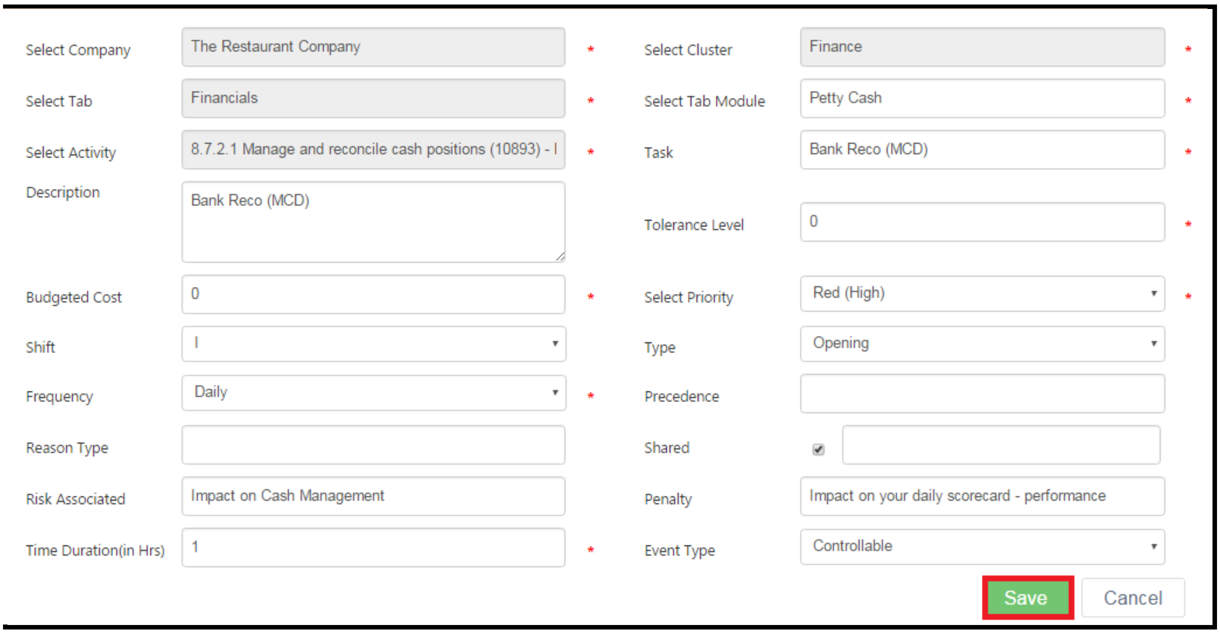


Figure 6-53

6.7.3 Add Response Form

- **Step 1**- Click on the **Add task response form** icon.

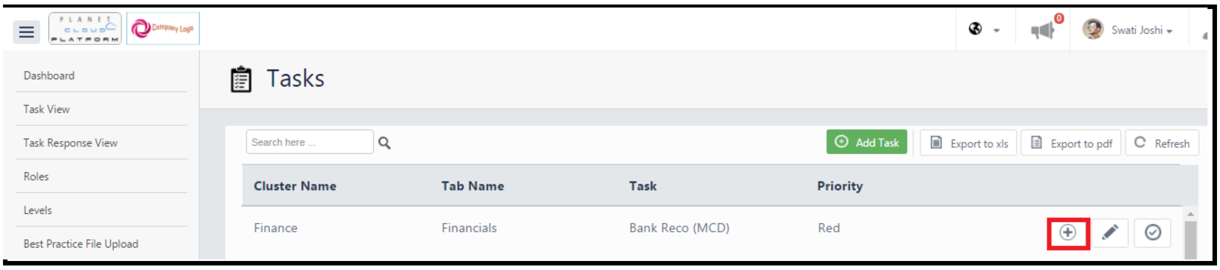


Figure 6-54

- **Step 2-** Fill in the following as given below:
  - ➢ In the **Number of Input(s)** field, enter the desired Value and click on the **Add** button.
  - ➢ In the **Field Name** field, enter the desired Data. In this case, select "**If not done, select appropriate response**".
  - ➢ Click in the **Field Type** field. Select type of response required
  - ➢ Click in the **Possible Values** field.
  - ➢ Click to drop down the **Help Type** list and select the desired **Type** from the list. In this case, select "**Media**".
  - ➢ Click on **save** button

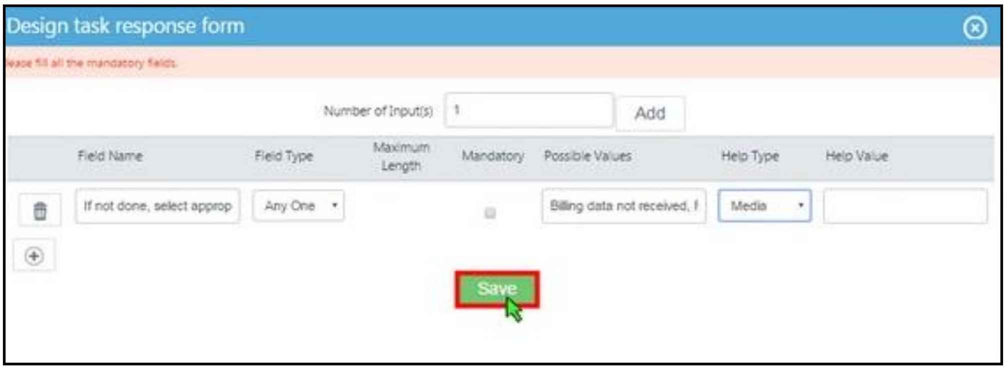


Figure 6-55

6.7.3 Activate / deactivate a Task

- **Step 1**- Click on **Activate** button, a pop message will display as, "Are you sure you want to deactivate the Task" with **Ok** and **Cancel** button. Select Ok to deactivate it.

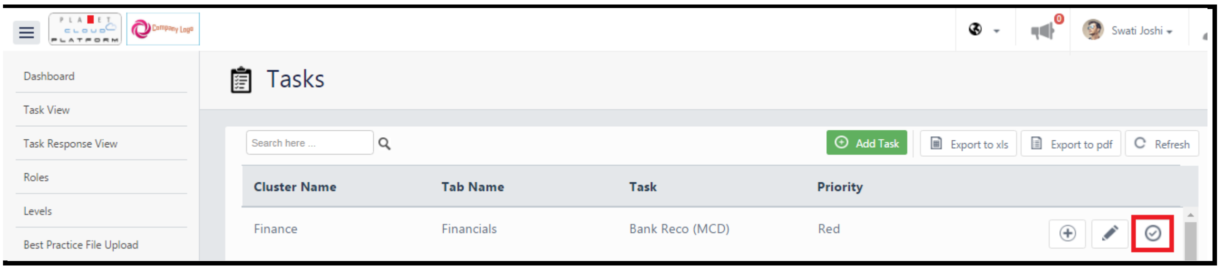


Figure 6-56

- **Step 2**- Click on **Deactivate** button, a pop message will display as, "Are you sure you want to activate the Task" with **Ok** and **Cancel** button. Select Ok to activate it

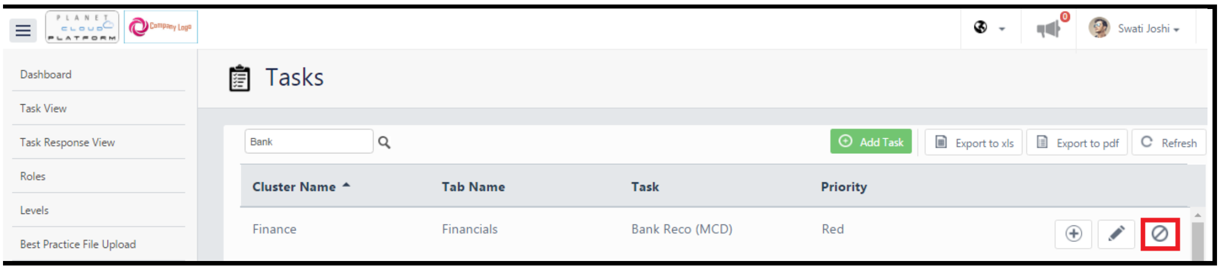


Figure 6-57

6.8 Workflow

6.8.1 How to create a Workflow

- Step 1-Click on the Workflow

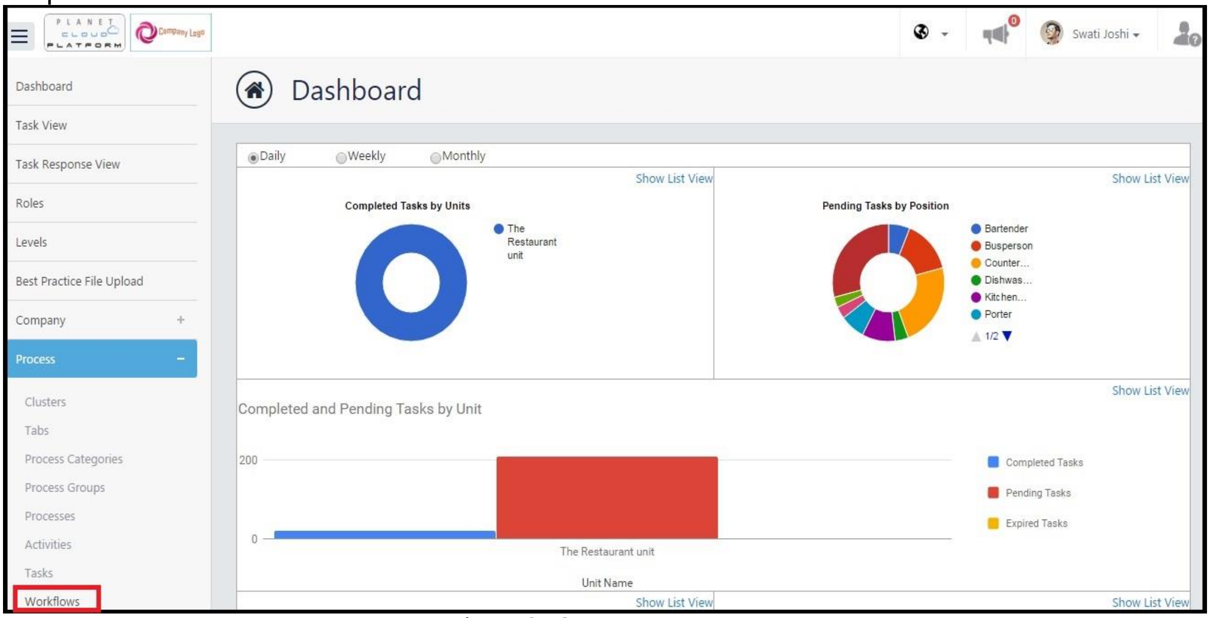


Figure 6-58

- Step 2- Click on the **Add Workflow** button.

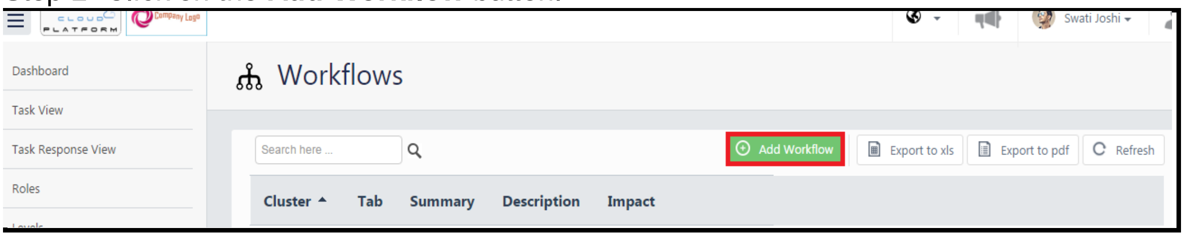


Figure 6-59

- **Step 3**-Fill in the following as given below:
  - ➢ Company field is auto filled.
  - ➢ Select the desired **Cluster** from the list. In this case, select "**Facility Related**".
  - ➢ Select the desired **TAB** from the list. In this case, select "**Facility Maintenance**
  - ➢ In the **Summary field**, enter summary for workflow. In this case, entered "**Facility maintenance**
  - ➢ In the **Add Task** field, enter desire number. In this case, entered "**2**"
  - ➢ Click on **Add** Button

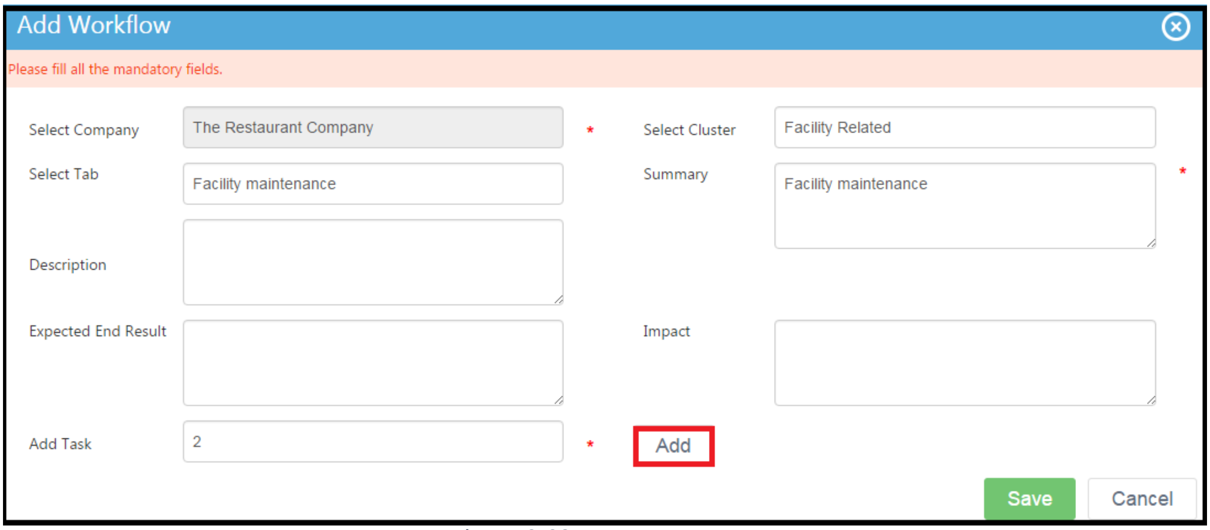


Figure 6-60

- Step 4- Fill in the following as given below:
  - . In the **Select Task**, select desire Task name. In this case, selected "**Cleaning of Blast Freezer Zone**
  - . In the **Task order**, enter desire order. In this case, enter "**2"**
  - Click on the **Save** button

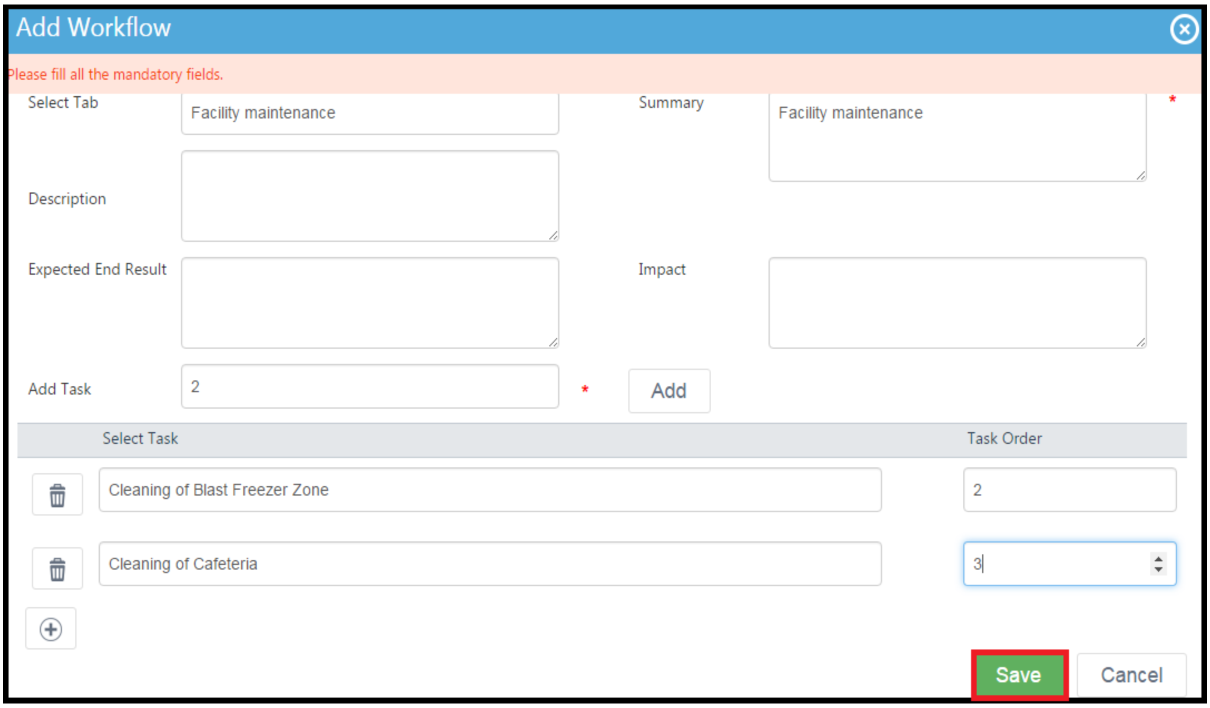


Figure 6-61

6.8.2 Edit a Workflow

- **Step 1-** Click on (**Edit**) ✎ icon

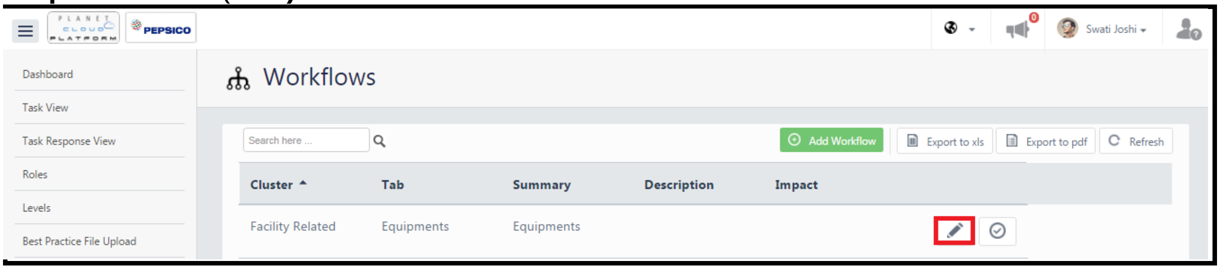


Figure 6-62

- **Step 2**- Edit the desired fields according to the changes to be made in the window

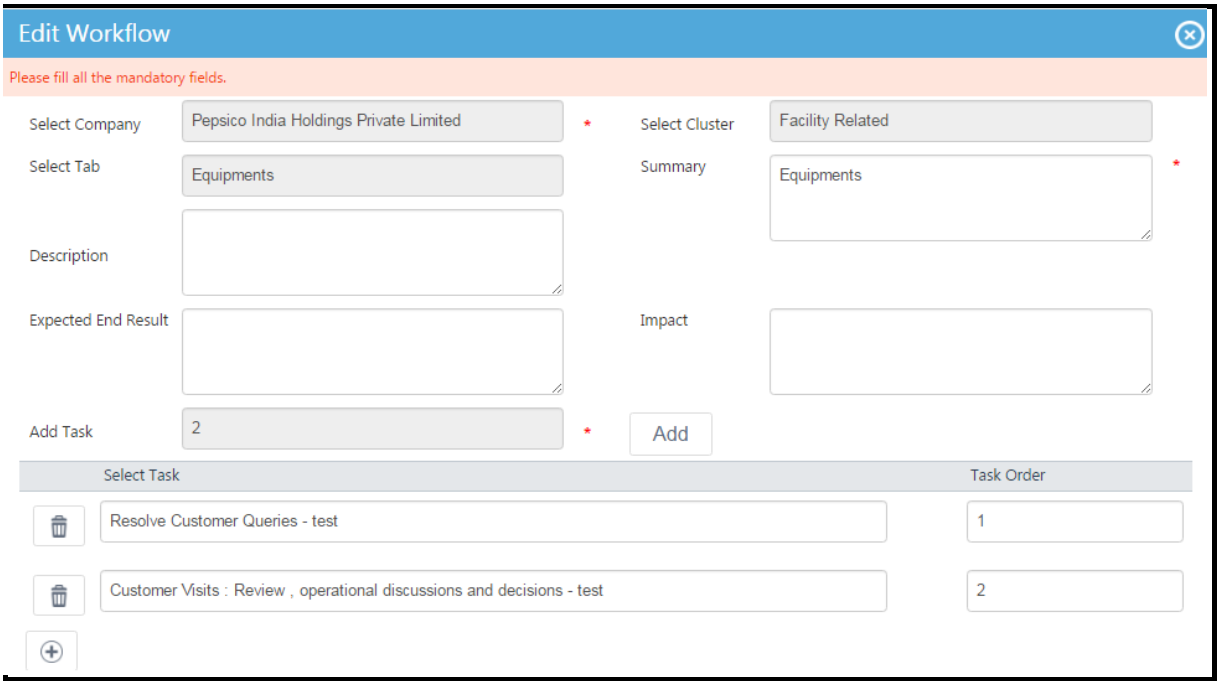


Figure 6-63

6.8.3 Activate/ deactivate a workflow

- **Step 1**- Click on **Activate** button, a pop message will display as, "Are you sure you want to deactivate the Workflow" with **Ok** and **Cancel** button. Select Ok to deactivate it.

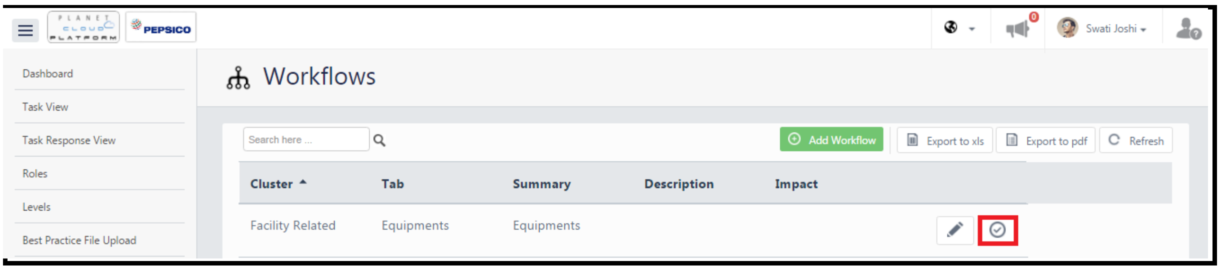


Figure 6-64

- **Step 2**- Click on **Deactivate** button, a pop message will display as, “Are you sure you want to activate the Workflow” with **Ok** and **Cancel** button. Select Ok to activate it -

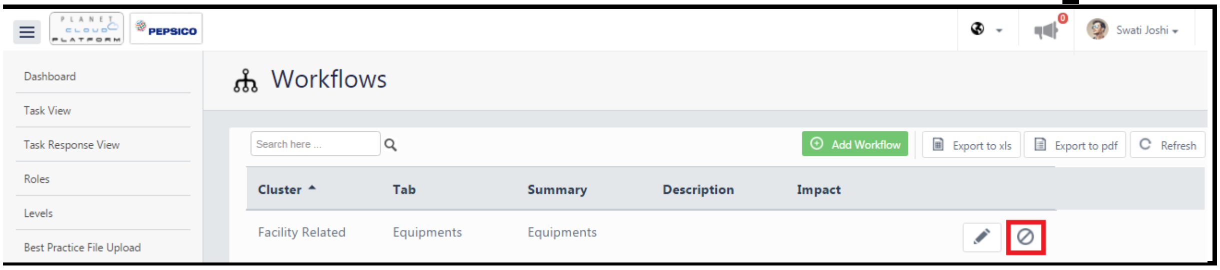


Figure 6-65

6.9 Task Calendar

- **Description**

A task calendar is the scheduling part of the Tasks created in the upper sections, this part also has the option of creating and scheduling tasks in a single go via the Excel file upload, where spreadsheet with the specified format is uploaded in the system.

Apart from that we can manually schedule each task created also in case there are positions unavailable for certain tasks to be performed, etc.

6.9.1 How to create a Task Calendar

Method 1: Add Task Calendar without using excel

- Step 1- Click on the **Task Calendar.**

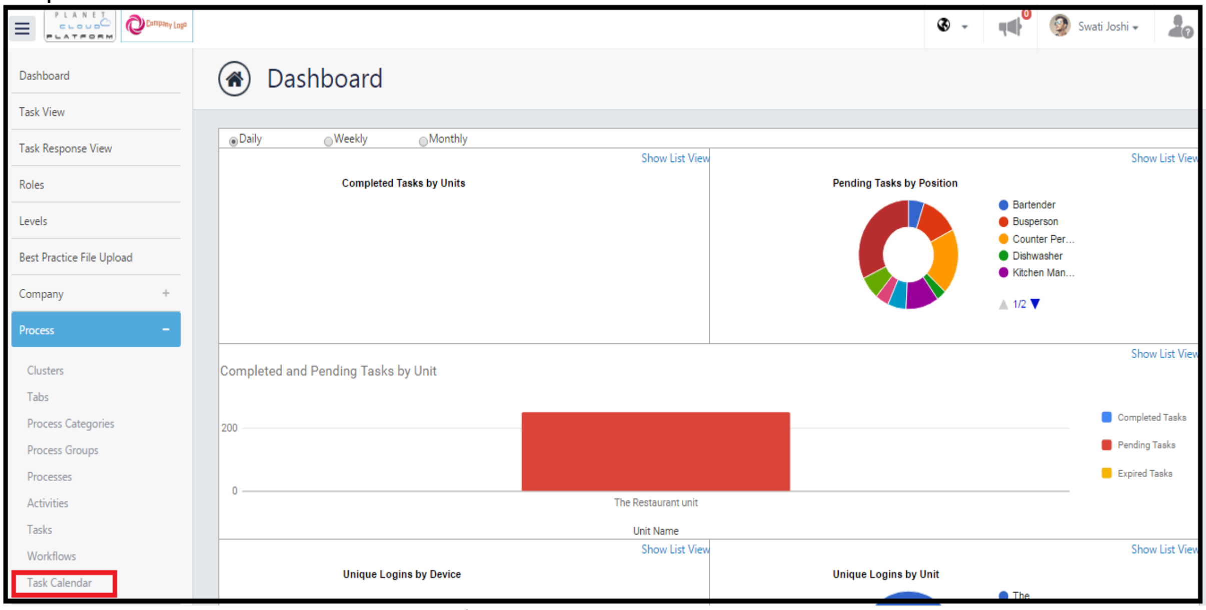


Figure 6-66

- Step 2- Click on the **Add Task Calendar** button

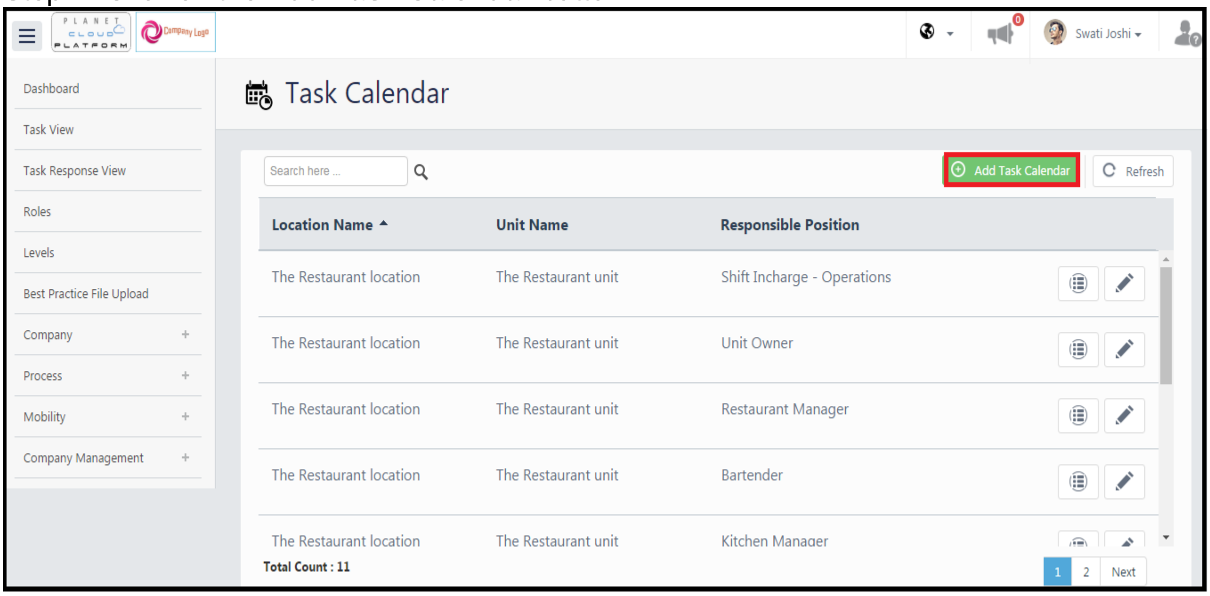


Figure 6-67

- **Step 3-** Select the appropriate Location, Unit and Client to add the Task calendar and select desired cluster and click on the **Show Task(s)** button

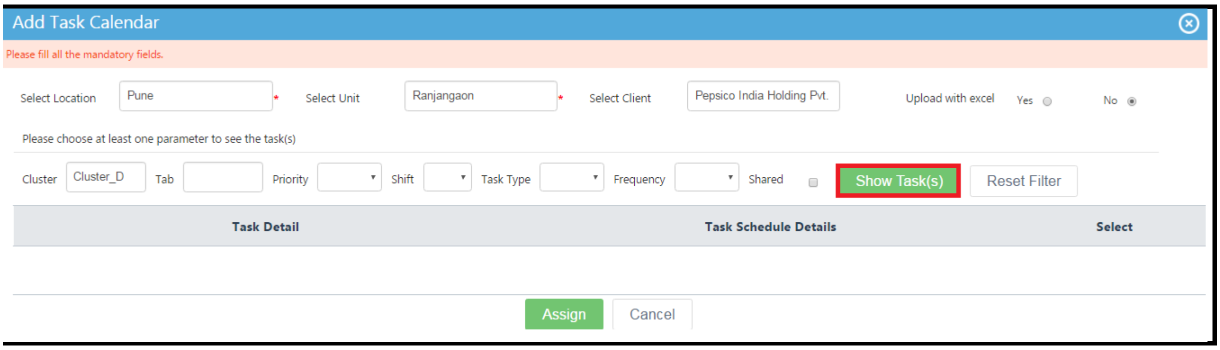


Figure 6-68

- **Step 4-** Enter the following fields using the instructions given below:
  - In the Task Frequency field, select the desired frequency from the dropdown list
  - Select the desired **Start Date** from the Calendar
  - In the **Recurrence** field, enter the Recurrence For e.g., Daily (365), Weekly (52), Fortnightly(24), Monthly (12), Quarterly (4), Half Yearly (2), Yearly (1)
  - In the (Lead**) L** Field, select the desired **Lead** from the list For e.g. select Lead as "CPO" as the task is for his unit
  - In the (Responsible) **R**, select the Position/user who will complete the task and is RESPONSIBLE.
  - In the (Consult) **C**, selected Consult will be the Reporting Manager of the "RESPONSIBLE".
  - In the (Informed) **I**, selected Informed will be the Department Head or Functional Head
  - Select the **Generation of Transport Invoice** Check box and Always tick the check box before clicking on assign
  - Click on the **Assign** button

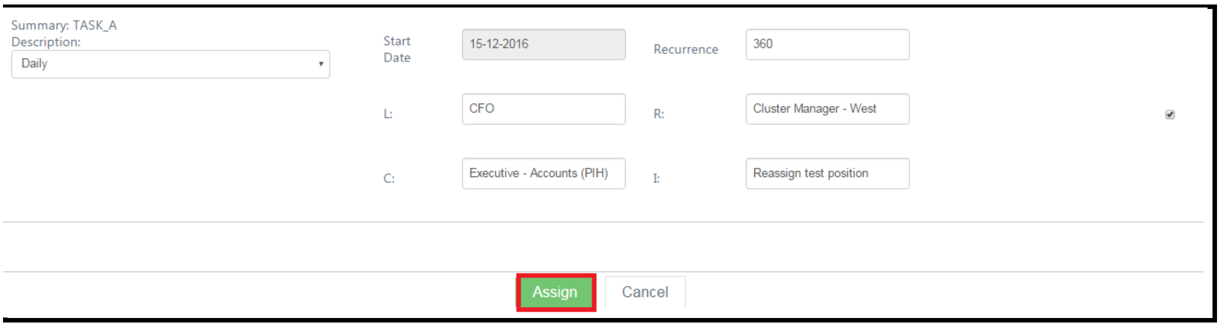


Figure 6-69

Method 2: Add Task Calendar using excel

Using Excel upload will require an Excel file created using the steps given below:

Step 1 – Open your native spreadsheet application. (E.g. Microsoft Excel) and select New Blank Workbook.

Step 2 – Always use the first row as header row. Use the following headers given below for the Task Calendar file:

- Sr. No.
- Start Date
- Tab module
- Activity
- Task
- Lead
- Responsible
- Consulted
- Informed
- Risk associated if not done
- Penalty
- Frequency
- If Weekly Mention Day
- Shift
- Type
- Event Type
- Tolerance level (in Days)
- Precedence
- Priority
- Shared task for Dependence
- Time Duration(in Hrs)
- Recurrence
- Client Name

Step 3 – Next start populating each row according to its header using the instructions provided below.

Input of Data

- Enter all data in correct grammatical order with the first alphabet in Upper case and all further alphabets in lower case.
- Be mindful to avoid adding extra "invisible" characters (such as blank spaces or tabs after the text) to the tables that may cause problems when importing the data.
- Make sure the numbering on the data is carefully inspected.
- Make sure the Activities (Section 6.6) linked which each task is the exactly the same as created in the system. Any form of mismatch in spelling and grammar will result in that task being not linked.
- Ensure the Tab Modules used to link have also been created (Section 6.2.3) in the system.
- Also make sure the Lead, Responsible, Consulted and Informed positions have also been created in the system first (Section 6.1).
- No 2 activities can have the same serial no.
- Complete entries for the entire row under the important column headings. Blank cells can also cause problems during import.

How to fill in the data

- **Sr.No. :** Serial Number

- **Start Date:** Starting date for the Task, system will start scheduling based on the date given here. To be filled in DD/MM/YYYY format
- **Tab Module:** Write the appropriate Tab Module for that Task
- **Activity:** Use the Activity you want to link with that particular Task.
- **Task:** The actual task statement has to be written under this heading.
- **Lead:** Mention the position which will be in charge or supervise the position responsible to perform this Task.
- **Responsible:** The Position that actually performs the given Task.
- **Informed:** This will be will be the Department Head or Functional Head of the Responsible position.
- **Consult:** The Consult will be the Reporting Manager of the Responsible Position.
- **Risk associated if not done:** Enlist the consequences or actions associated with the task not being completed.
- **Penalty:** Actions which will be taken if Task hasn't been completed.
- **Frequency:** Single letters to be used to mention frequency or how often each that Task will occur for.
    - **H –** Daily
    - **W –** Weekly
    - **F –** Fortnightly (every 14-15 days)
    - **M –** Monthly
    - **Q –** Quarterly (every 3 months)
    - **HY –** Half Yearly
    - **Y –** Yearly
- **If Weekly Mention Day:** If the above column has W (Weekly) Frequency then mention in this column the Day of the week.
    - If the Task isn't weekly then mention 0 by default.
    - If the Task is Weekly then mention 1 for Sunday, 2 for Monday and so on till 7 for Saturday accordingly.
- **Shift:** If there are different Shifts in which work is done then mention the Shift here using I, II and III accordingly.
- **Type:** Type of Task based on the action,
    - **Opening:** For tasks which are meant to be performed at opening or at start of the shift.
    - **Closing:** For tasks which are supposed to be performed during closing or at the end of a shift.
- **Event Type:** Can be either **Controllable** or **Uncontrollable**.
- **Tolerance level(In Days):** Number of days a task take to complete that Task i.e. That task will be active for the mentioned number of days before expiring.
- **Priority:** Tasks can be sorted according to Red, Amber and Blue priority levels.
    - **Red:** High priority and immediate completion.
    - **Amber:** Medium priority.
    - **Blue:** Low priority.
- **Time Duration(in Hrs):** The total number of hours that particular task will take to be completed
- **Recurrence:** In numbers according to the Frequency mentioned above. For e.g.
    - 365 – For daily tasks
    - 12 – For monthly tasks
- **Client Name:** Select the Client for which that Task will be applicable to.

After all columns and rows have been appropriately filled using the instructions and data given above, Go to File > Save As and Save the Excel file in a .xls format.

- **Step 1**-Fill in the following as given below:
  - ➢ Select the desired **Location**, **Unit** and **Client** to add the Task Calendar
  - ➢ Click on the **Yes** button to upload with excel.

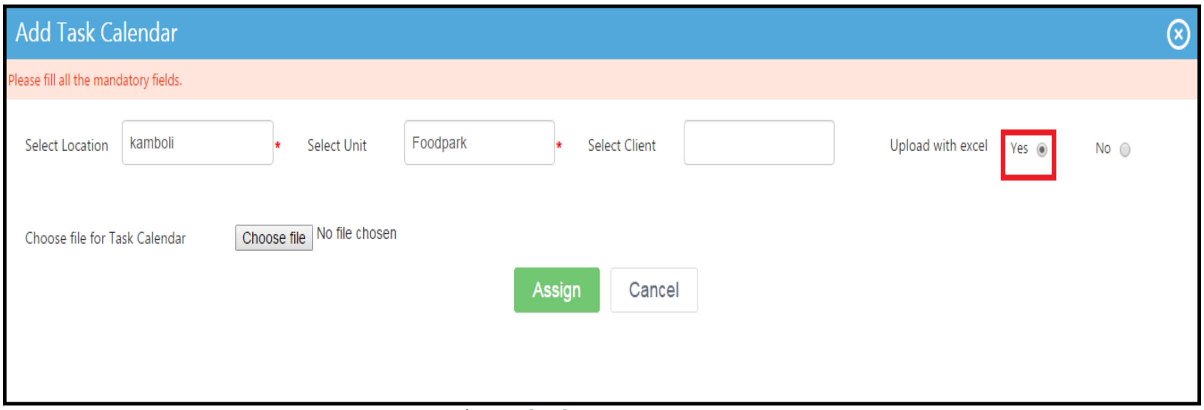


Figure 6-70

- Step 2-Fill in the following as given below:
  - ➢ Click on the "**Choose file**" button
  - ➢ By clicking on "**Choose file**" button, File directory is opened and choose a desire file and click on "**open"** button.
  - ➢ Click on "**Assign**" button

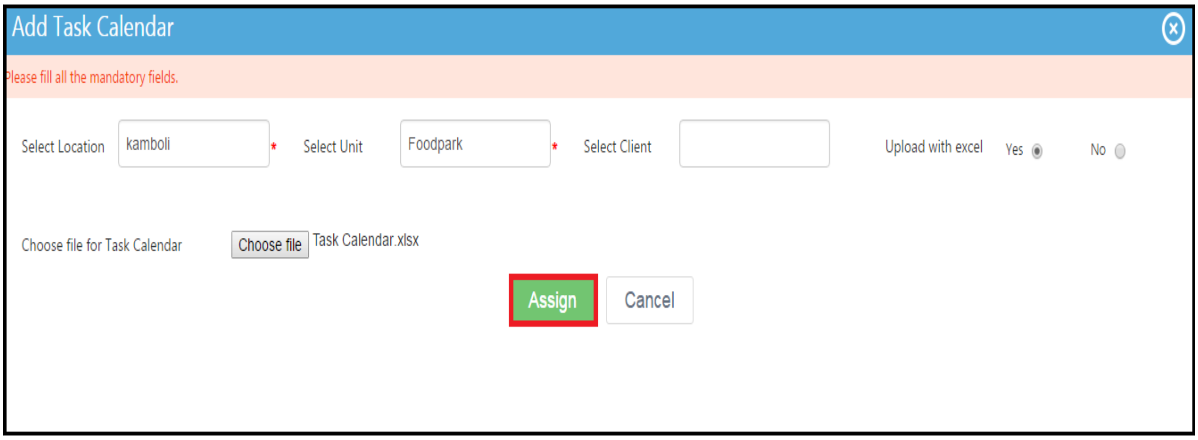


Figure 6-71

6.9.2 How to Reassign Task Calendar of position

- **Step 1**-Click on (**Reassign Task Calendar of position**) button

Figure 6-72

- **Step 2**- Enter the following fields using the instructions given below
    - Click in the **Choose task to reassign**, select the desired task you want to reassign.
    - Click in the **LCRI** fields, select the position for particular units
    - Click on **From date**, select the desire from date and all the days before today is disabled.
    - Click on **To date**, select the desire to date and to date should be greater then start date
    - Click on the **Reschedule** button.

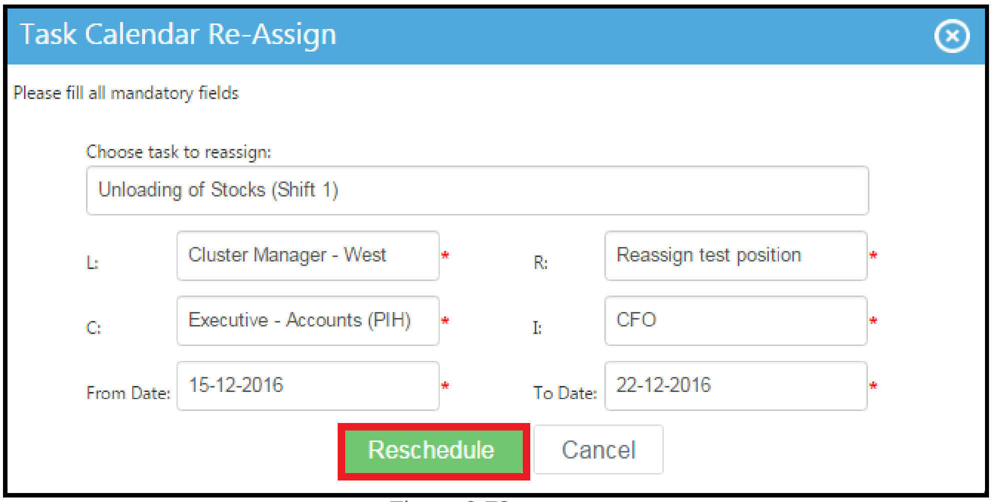


Figure 6-73

6.9.2 Edit Assigned Task of position.

- Step 1-Click on the (**Task assigned to position**) button.

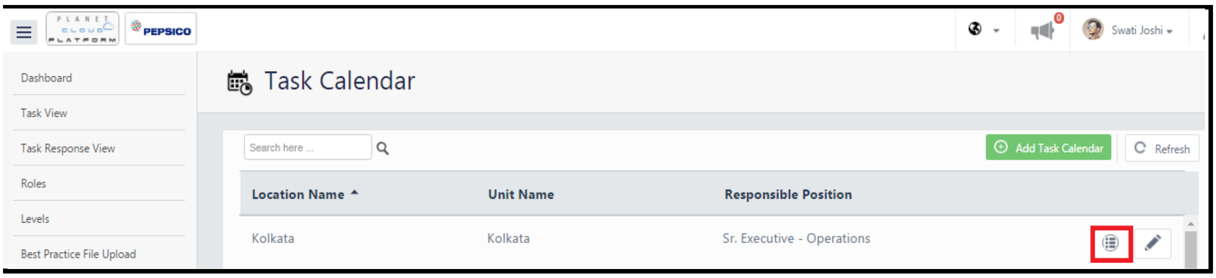


Figure 6-74

- **Step 2**-Fill in the following as given below:
    - Click in the **Search** field and enter desire task you want to **Edit** or **Delete** and hit on **search** icon.
    - Click on the (**Edit**) icon to edit the assigned task to positions.
    - Click on (**Delete**) button to delete the assigned task to positions.

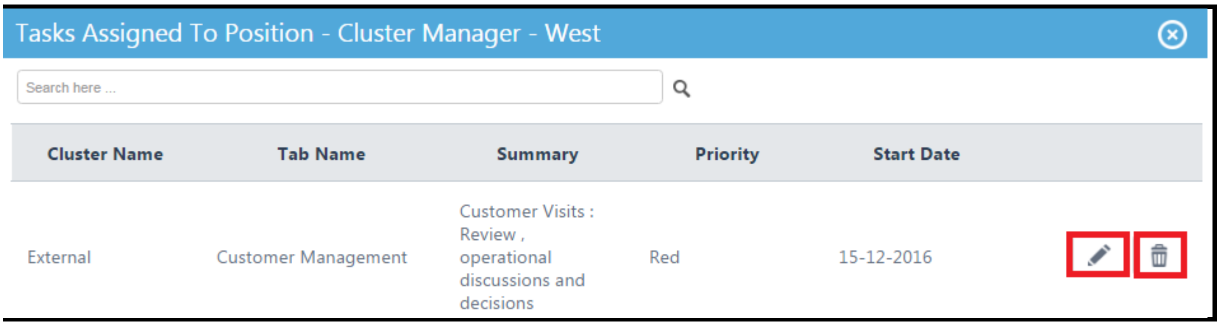


Figure 6-75

- **Step 3**- Fill in the following as given below
  - ➢ Click on the (**Edit**) icon.
  - ➢ Click in the **LCRI** fields, edit the position for particular units.
  - ➢ Click in the **Start Date**, Select the desired start date and click on the **Reschedule** button

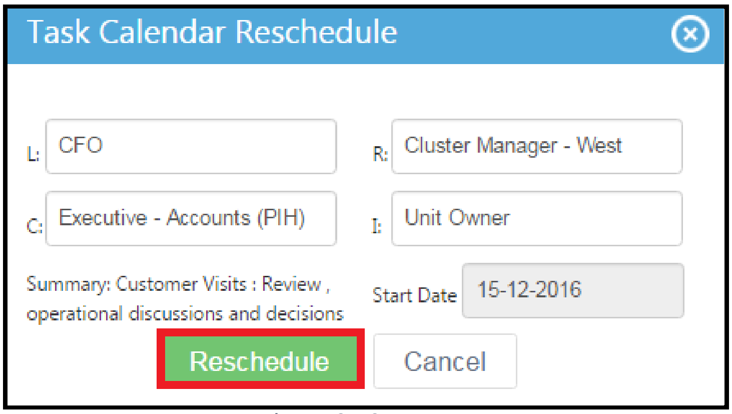


Figure 6-76

7.0 MOBILITY

7.1 Geofence

- **Description**

Geofences are a collection of geographical points pinned to create a boundary within a particular area inside which the registered devices can operate. Geofences are useful to allow operation and editing of the core system elements from devices present within the main establishment itself and not from outside.

7.1.1 How to create a geofence

- **Step 1**- Open the Dashboard and navigate to **Mobility**. Expand it and select **Geofences**.

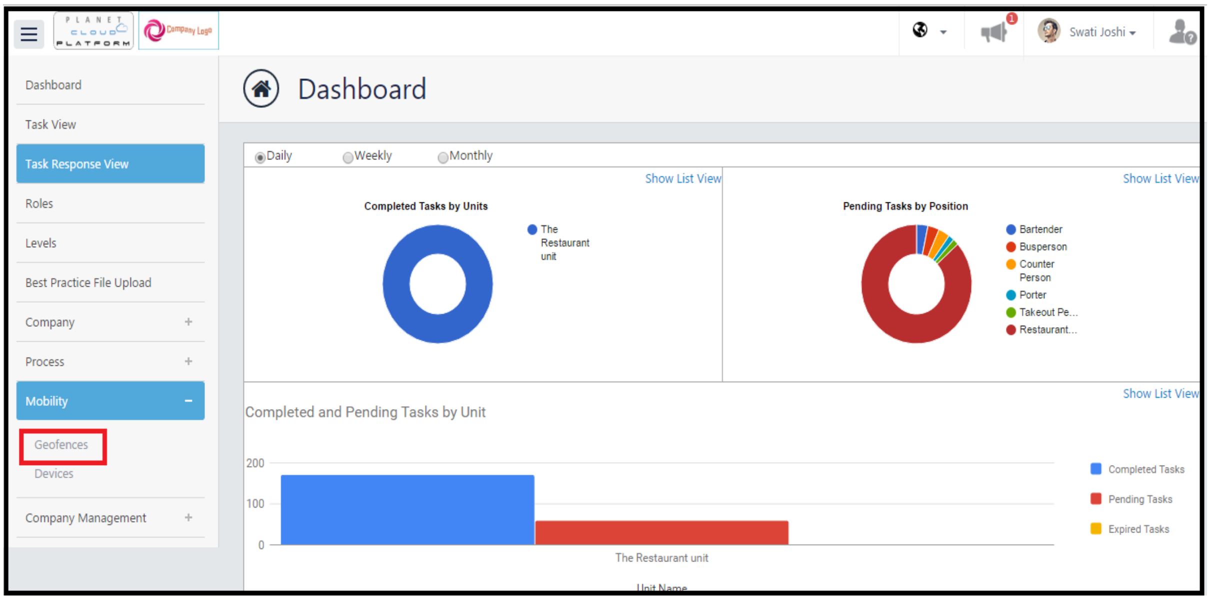


Figure 7-1

- **Step 2-** Then select **Add Geofence**.

Figure 7-2

- **Step 3**- Enter the following fields using the instructions given below.
  - ➢ In the **Location** field, enter the location name of your establishment.
  - ➢ Click on the **Show Location** button, which will show the map of your desired location.

➢ Use points to select the area around the unit location. Minimum 3 points need to be selected.
(Use the drag option to drag the map till you find your desire unit location.)
➢ Click on the **Draw Geofence** button to highlight the area that'll be covered by your Geofence.
➢ In case you want to reset your selection use the **Clear Geofence** option

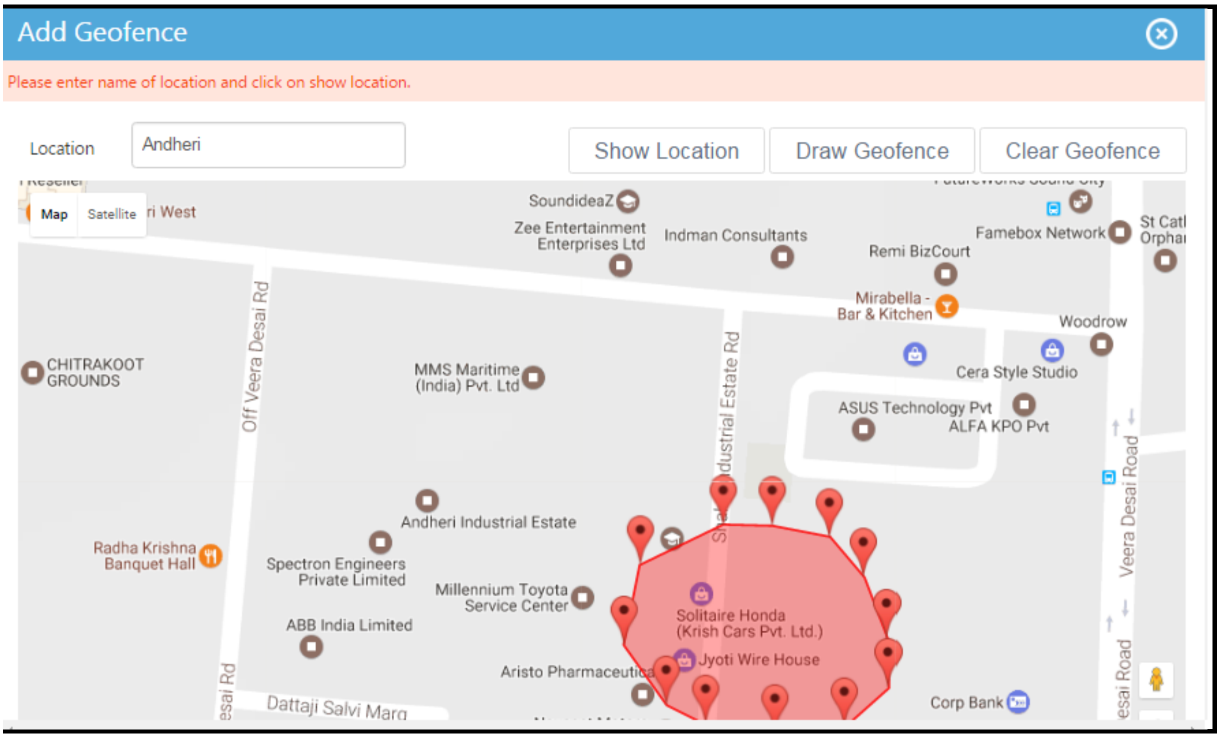


Figure 7-3

- Step 4- Once your desired Geofence is mapped properly scroll down and in the **Name** field enter an appropriate name for that Geofence for e.g. Head Office and brief summary in the **Summary** field. Click on **Save** to save that Geofence.

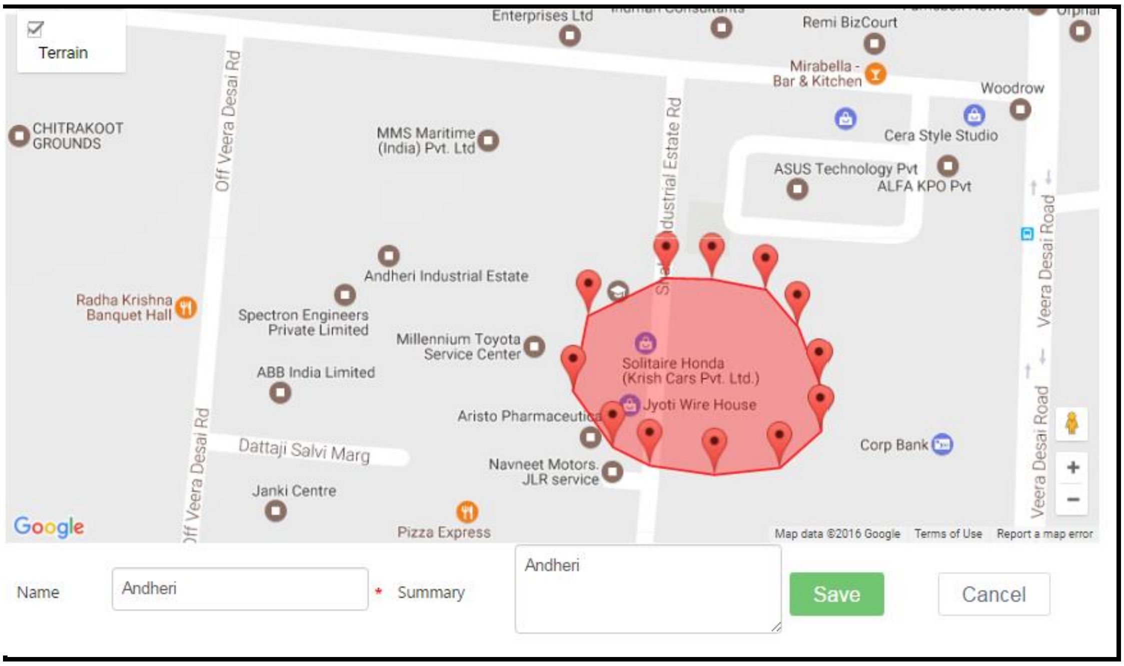


Figure 7-4

7.1.2 Activate / deactivate a geofence

- **Step 1**- Click on **Activate** button, a pop message will display as, "Are you sure you want to deactivate the Geofence" with **Ok** and **Cancel** button. Select Ok to deactivate it.

Figure 7-5

- **Step 2**- Click on **Deactivate** button, a pop message will display as, "Are you sure you want to activate the Geofence" with **Ok** and **Cancel** button. Select Ok to activate it again.

Figure 7-6

7.1.3 Delete a geofence

- Step 1 – To delete any existing Geofence, simply click on the Trash icon (as shown in Figure 8-7) for that Geofence and it will be deleted.

Figure 7-7

7.2 Devices

- **Description**

Devices are what will be used by the users to interact and use the UnitX Pro system. Devices are entered into the system and can have Users assigned to them to increase security, so only those Users which are assigned to that device can use the system on them. On hand-held devices we can assign Geofences as well to maintain access to the system within the specified Geofence.

7.2.1 How to add a device

- Step 1- Select the Dashboard and click on the Mobility tab, then select Devices.

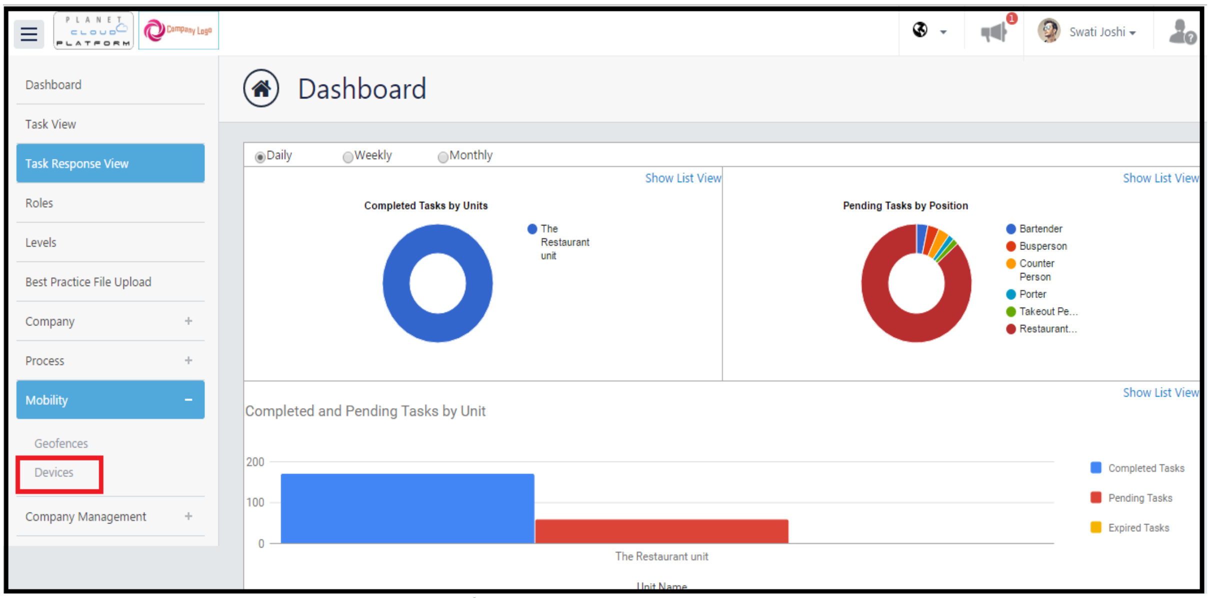


Figure 7-8

- Step 2- Click on 'Add devices'

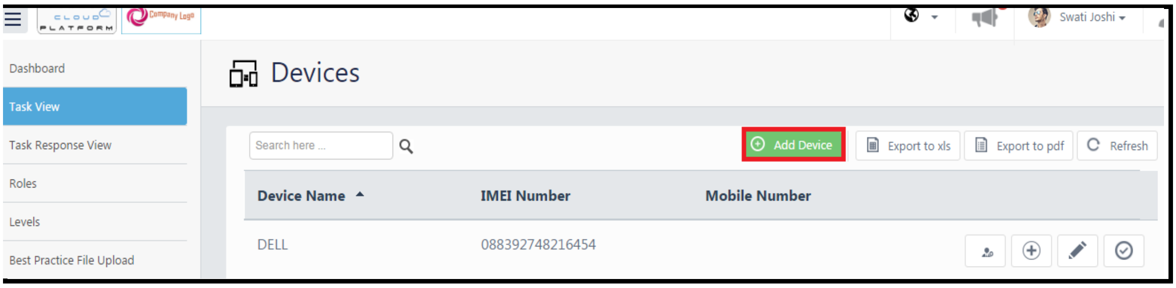


Figure 7-9

- Step 3- Add the following details according to the descriptions given below:
  - **Name***: Name of the device
  - **IMEI Number*:** International Mobile Equipment Identity number, can be found by dialing *#06# on any mobile handset.
  - **Mobile Number**: Contact number for the device
  - **SIM Plan**: Specify either Prepaid or Postpaid
  - **Purchase date**: Date of purchase for the device according to purchase invoice
  - **Warranty Period**: Total duration of the warranty plan.
  - **Make**: Name of company that has manufactured the product.

- ➢ **Model**: Device model number/name.
- ➢ **SD Card Space**: Total storage capacity of the device.
- ➢ **Android OS version**: If the device is running Android then specify its Android version. Found at Settings > About device> Android version on any Android phone.
- ➢ **Maximum Permitted Offline Duration***: Number of hours the device can be kept offline
- ➢ **Active**: to be checked if it's being used to access the system.

*Mandatory fields, rest all are optional.

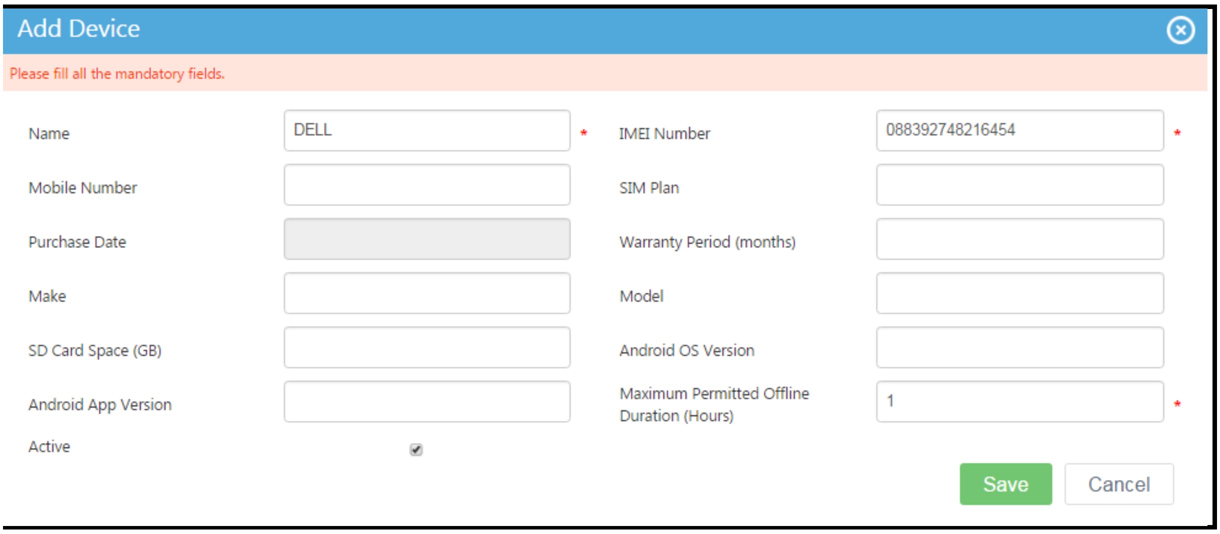


Figure 7-10

7.2.2 Edit a device

- Step 1 – Click on the Edit option as shown in Figure 8-11

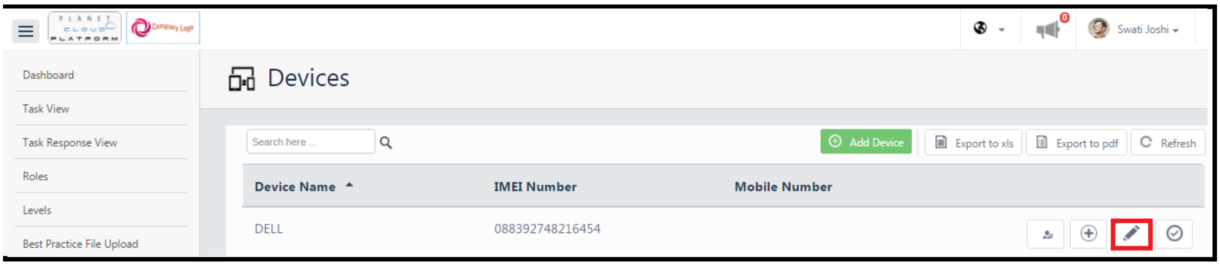


Figure 7-11

- Step 2- Edit the fields according to the descriptions given in **Section 7.2.1, Step 2**

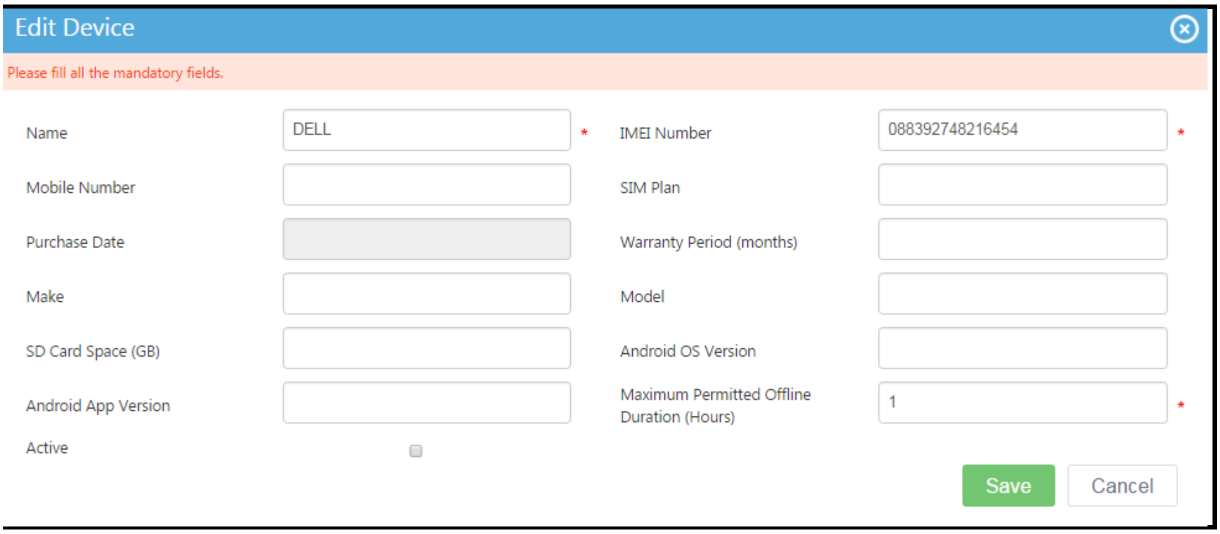


Figure 7-12

7.2.3 Assign User(s) to device

- **Step 1** – Click on the 'Assign User(s) to device' button as shown in Figure 8-13.

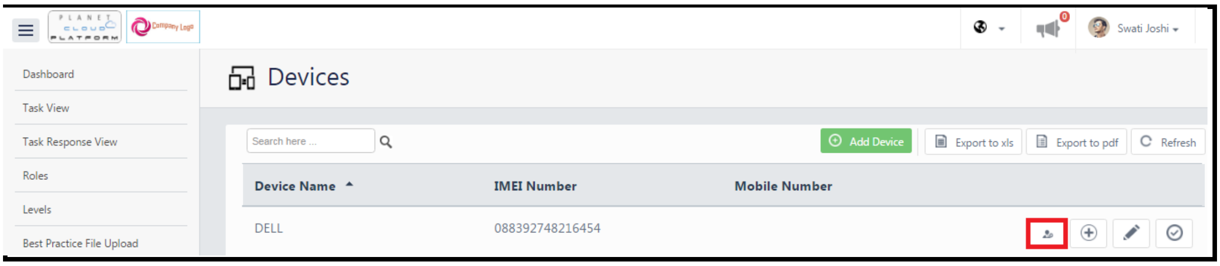


Figure 7-13

- **Step 2** – Select the appropriate System, Role and Level of the User you want to assign to this Device. Then type in the Number of Inputs(Users) and Click on 'Add' to generate the fields.

Figure 7-14

- **Step 3-** Then Select the appropriate User from the List of Users to be assigned to the device. You can add more inputs by using the + icon or Delete any you don't want by using the Delete button (Trash can symbol).

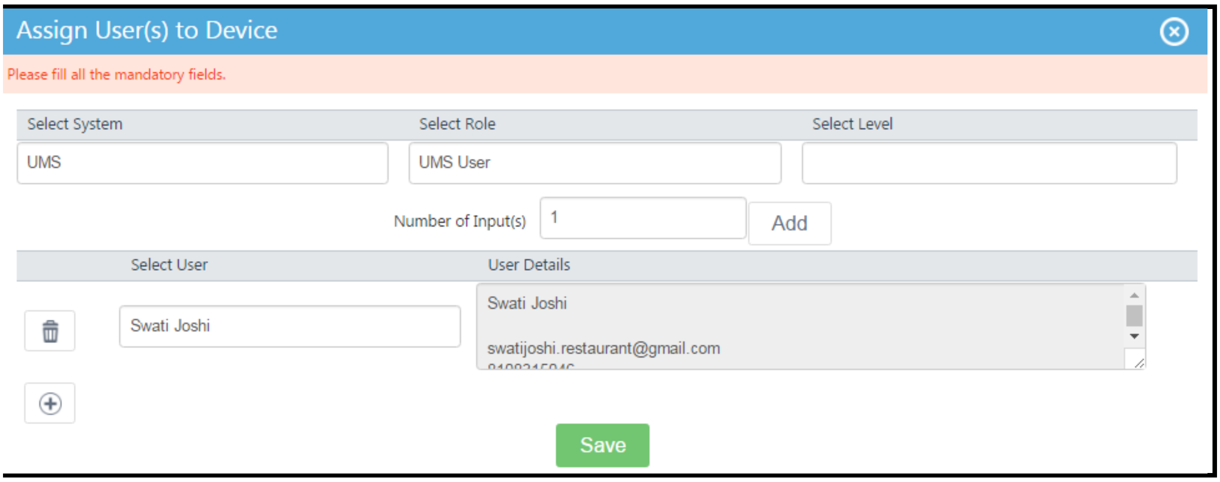


Figure 7-15

7.2.4 Assign Geofence(s) to device

- **Step 1-** Click on the ‘Assign Geofence(s) to device’ button as shown in Figure 8-16.

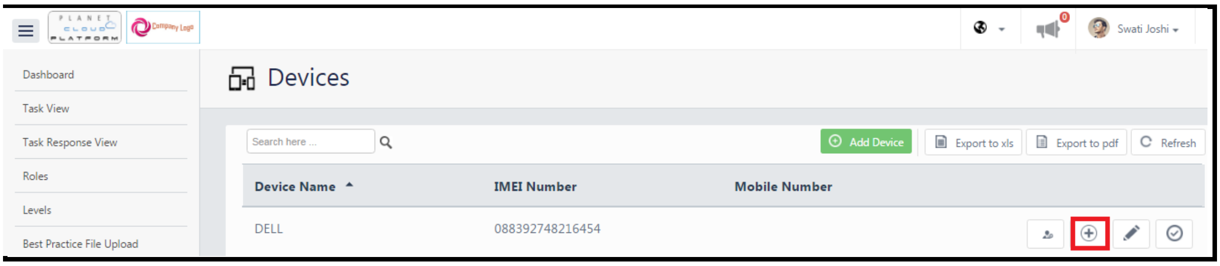


Figure 7-16

- **Step 2**- Type in the Number of Inputs (Geofences) and Click on ‘Add’ to generate the fields.

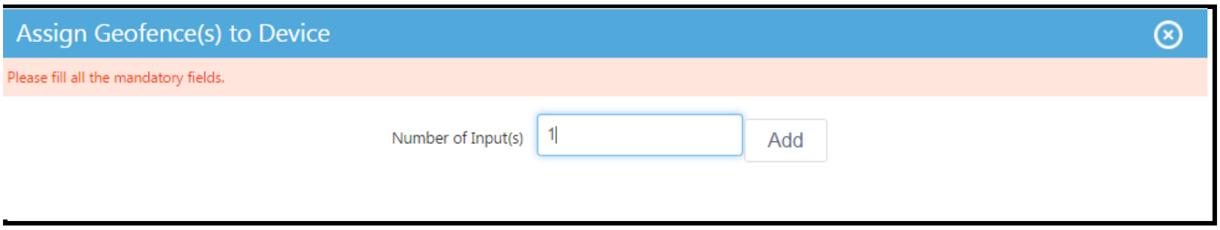


Figure 7-17

- Step 3- Select the appropriate Geofence from the List of Users to be assigned to the device. You can add more inputs by using the + icon or Delete any you don’t want by using the Delete button (Trash can symbol).

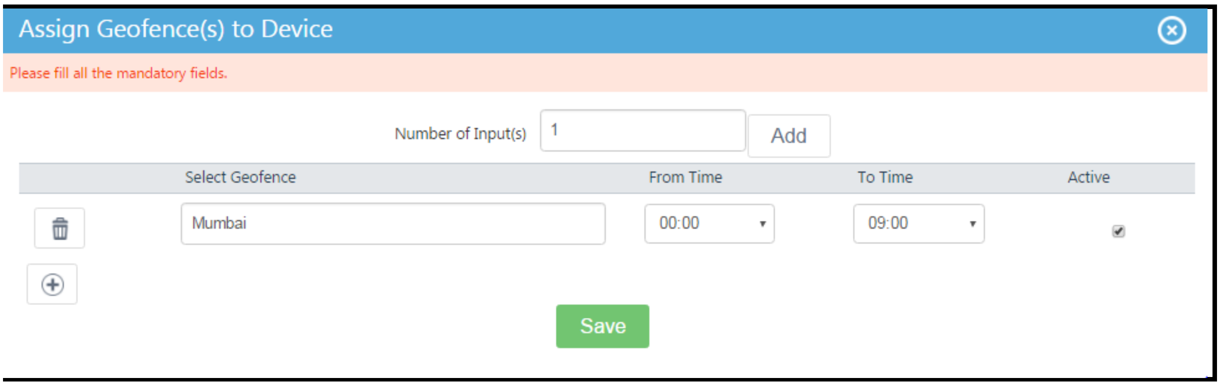


Figure 7-18

7.2.5 Activate / deactivate a device

- **Step 1** - Click on **Activate** button, a pop message will display as, "Are you sure you want to deactivate the Device" with **Ok** and **Cancel** button. Select Ok to deactivate it.

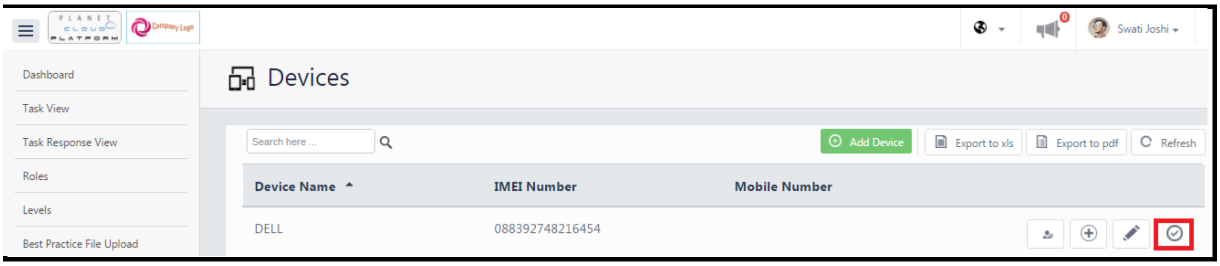


Figure 7-19

- **Step 2 –** Click on **Deactivate** button, a pop message will display as, "Are you sure you want to activate the Device" with **Ok** and **Cancel** button. Select Ok to activate it again.

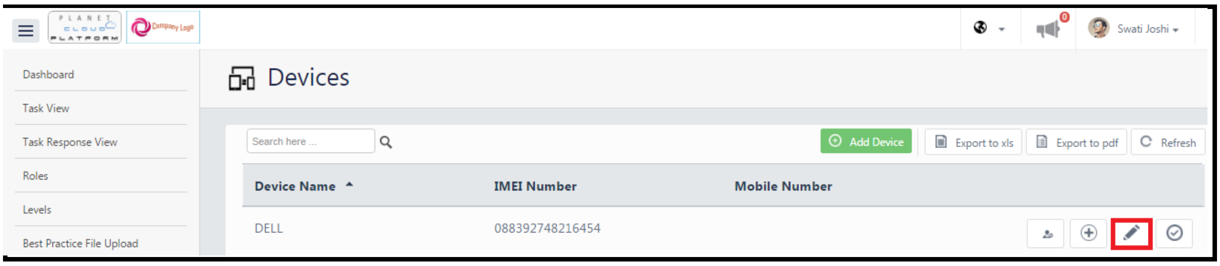


Figure 7-20

8.0 COMPANY MANAGEMENT

8.1 Announcements

- **Description**

Announcement is a written or spoken statement that tells people about upcoming event or important messages that need to conveyed.

8.1.1 How to create an announcement

- **Step 1**- Click on **Announcements**.

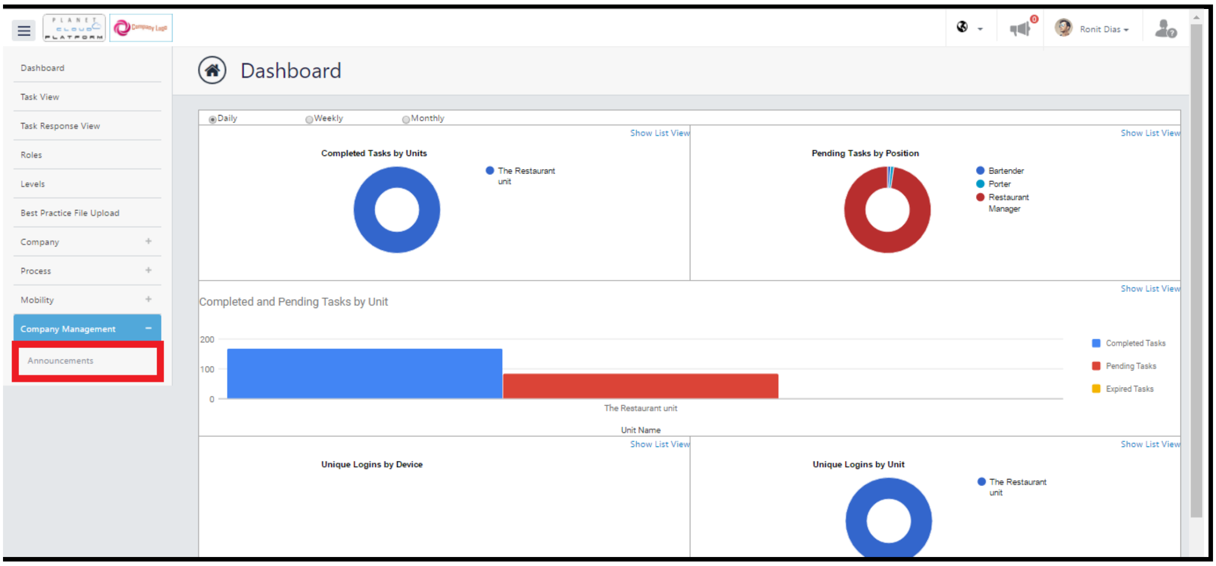


Figure 8-1

- **Step 2**- Click on **Add Announcement**.

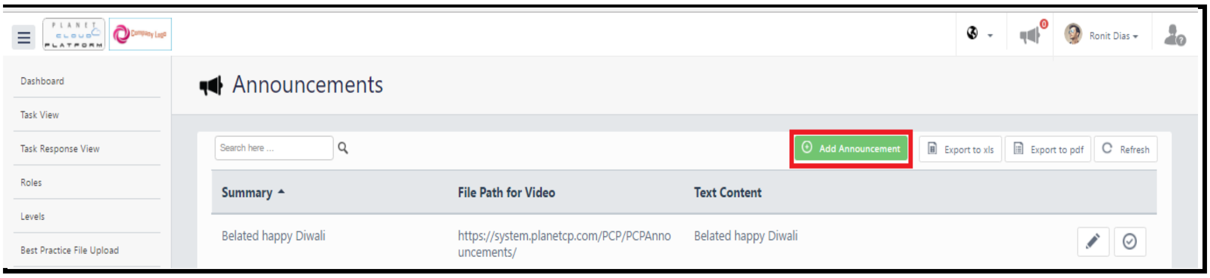


Figure 8-2

- **Step 3**- Fill the following as given below :
  - In the **Summary** field, write the summary of the announcement
  - In the **Start Date** field, mention the starting date of the announcement.
  - In the **End Date** field, mention the ending date of the announcement.
  - In the **Type field**, select the type of announcement you made such as Text/Video/Image.
  - In the **File Path** for Video/Image field, write the file path for the Image/Video attached.
  - In the **Text Content** field, write the text details of the announcement.
  - Click on **save** button

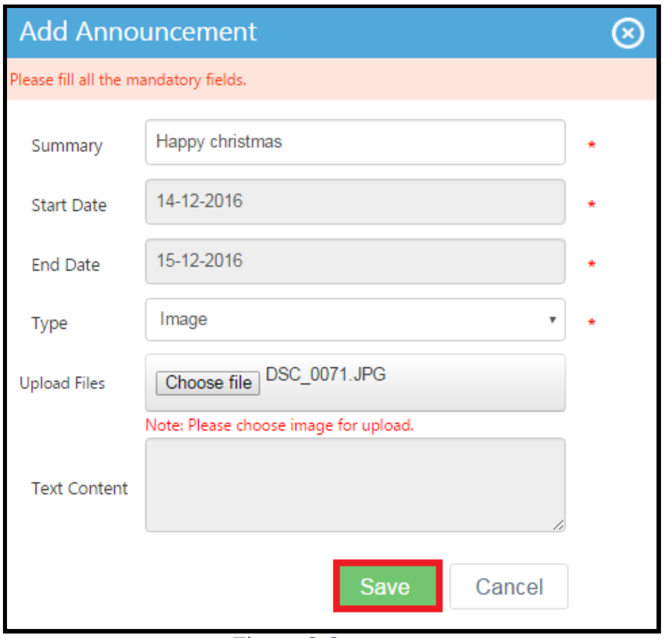


Figure 8-3

8.1.2 Edit an announcement

- **Step 1-** Click on **(Edit)** ✎ icon

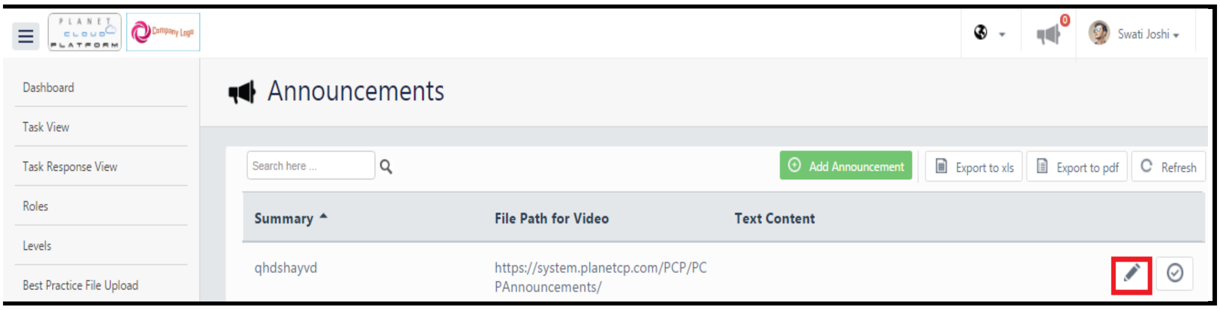


Figure 8-4

- **Step 2-** Edit the required fields and click on **Save** button to save the changes.

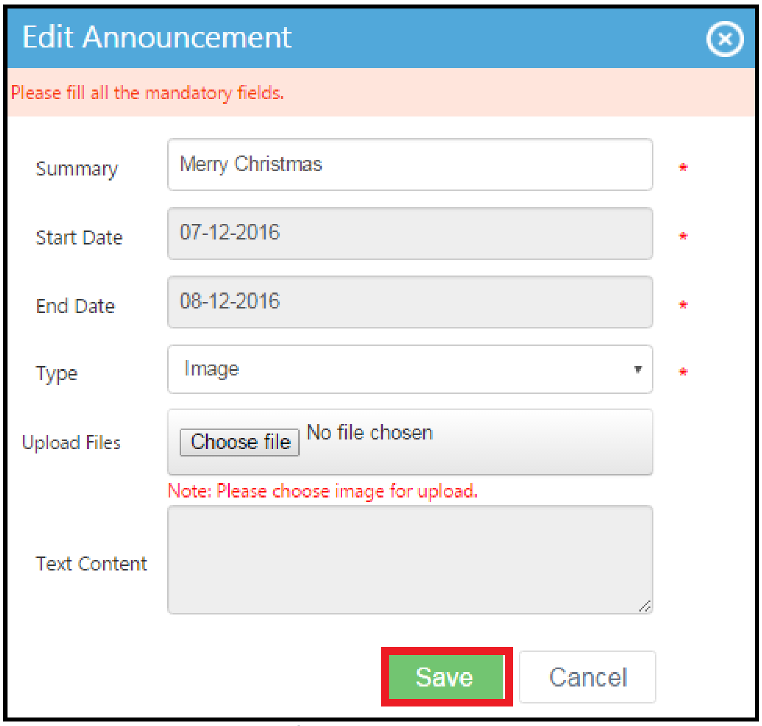


Figure 8-5

8.1.3 Activate / deactivate an announcement

- **Step 1-** Click on **Activate** button, a pop message will display as, “Are you sure you want to deactivate the Announcement” with **Ok** and **Cancel** button. Select Ok to deactivate it again.

Figure 8-6

- **Step 2-** Click on **Deactivate** button, a pop message will display as, “Are you sure you want to activate the Announcement” with **Ok** and **Cancel** button. Select Ok to activate it.

Figure 8-7