USER GUIDE

Contents

Homepage Dashboard

Homepage can be referred to as a User's Dashboard. It consists of:

- Applications available within the organization
- Every item associated to the individual user and
- Internal posts about what's news in the organization

Applications

Available Applications (referred to as business processes) within the organization will be available on the user's homepage. Refer to HERE to learn more about how does Application work.

User's Related Items

The following system grids are available in the User's Homepage:

- **Case List**: List of cases currently assigned to the user.
- **Hopper List**: Cases Hoppers that the user is the owner of or subscribe to.
- **Entity List**: List of Entities currently assigned to the user.
- **Quest List**: list of Quest forms the user completed but not being finalized.
- **Departments** - Direct Reports: list of user's direct reports.
- **Entity Role Relationship**: list of Entities associated to the user.
- **Updoc**: list of Updoc files assigned to the user.

NOTE: The grids will be visible if there are items associated to the user.

Company Internal Posts

Internal Posts serves as an internal communication within the organization with announcements such as employee recognitions, upcoming trainings, etc. User/employee will have an option to provide comments on the post.

Applications

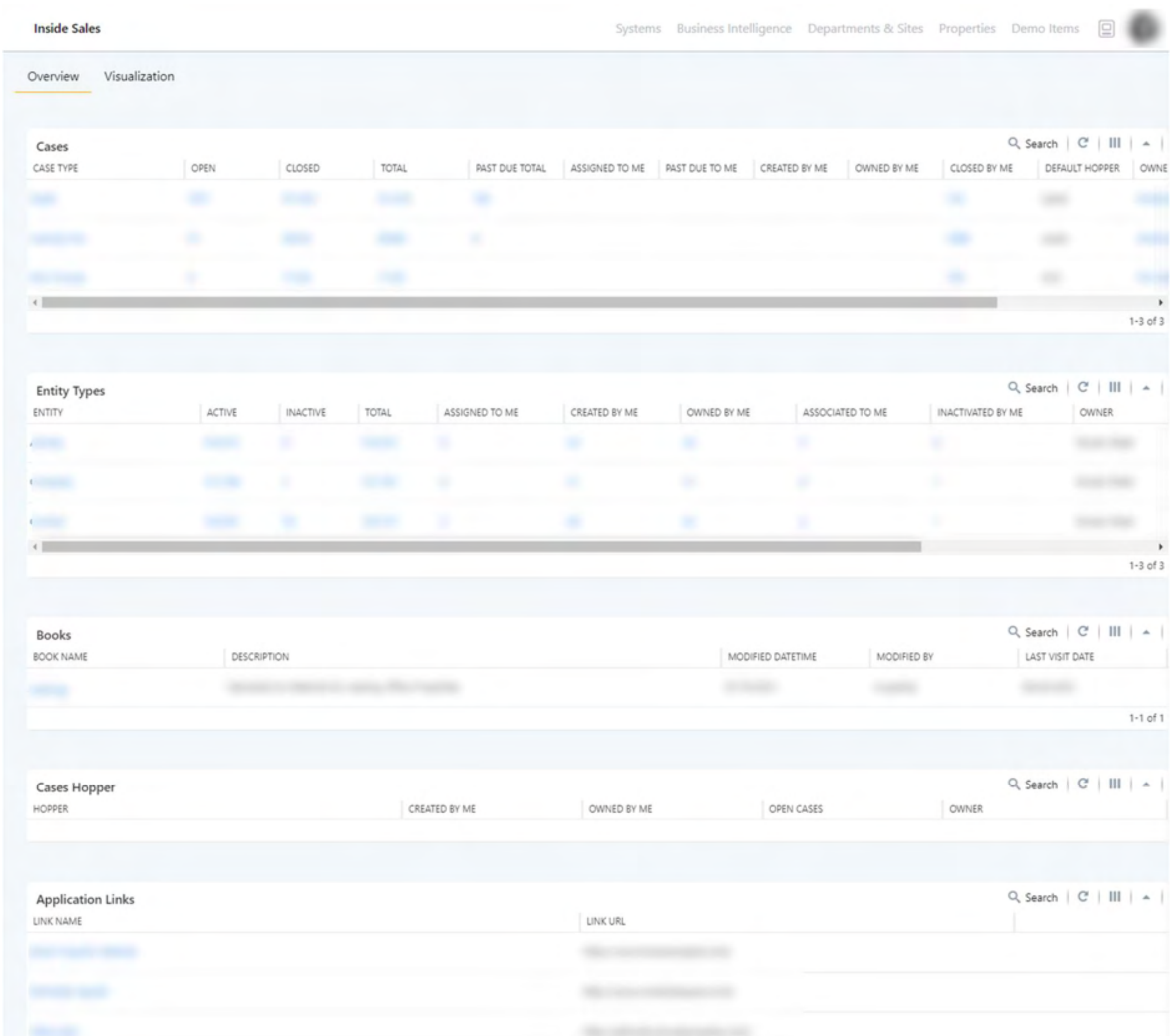
Applications provides a tool for the organization to organize the company's business processes by placing the related types, guidelines, and reports to manage a business process into an "Application". Applications allows the organizations to streamline the operations, procedures, and processes and make the way activities perform simpler and more effective.

Applications will be available in the User Homepage Dashboard.

To access the Application, simply click on the application icon.

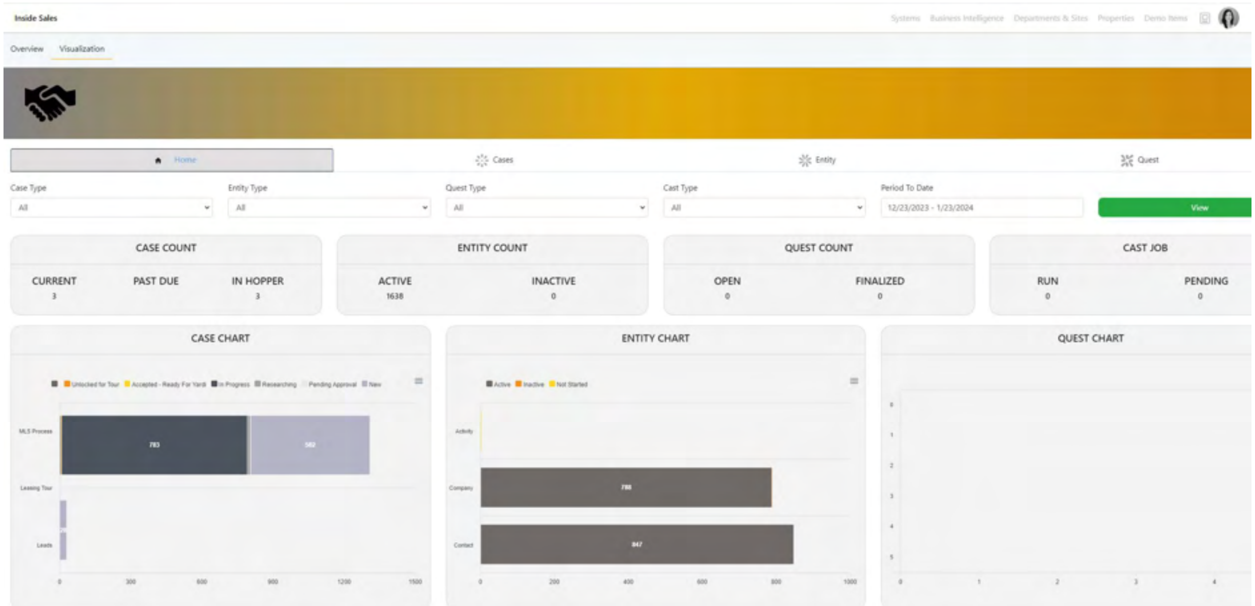
Overview

When click on an application, the system will direct the user to the Application Dashboard Overview. This dashboard consists of the configurations associated with the application such as Case Type, Entity Type, Quest Forms, Standards, Reports, and Links. User can click on the individual type to access the detail items.

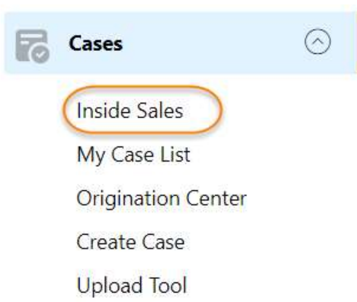


Visualization

Provides a graphical dashboard visualization of the existing cases and entities.



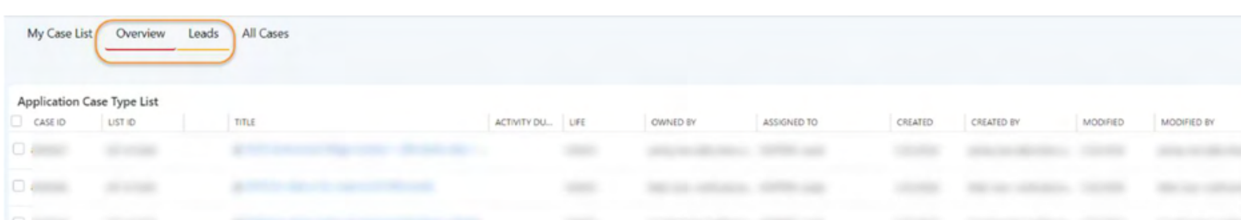
Once the user is in an application, the left navigation also provides quick access to the Application by adding the Application to the navigation:



Detail Navigation

Once a Type is selected, the system will take user to the detail items for that selected Type. Within Detail page, the system will provide different tabs, for example, in Cases:

1. My Case List: this section will provide the cases assigned to the user within the context of the Application.
2. Overview: when navigating to a Case Type, the navigation will highlight the current Case Type and provide the list of open cases:



3. All Cases: this section will list all open cases for all the case types within the selected Application.

Cases Application

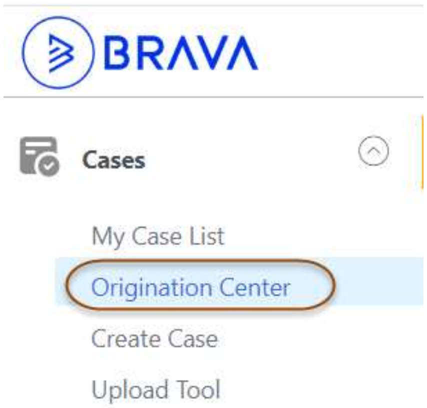
This guide provides instructions on how to create and interact with Cases.

Creating a Case

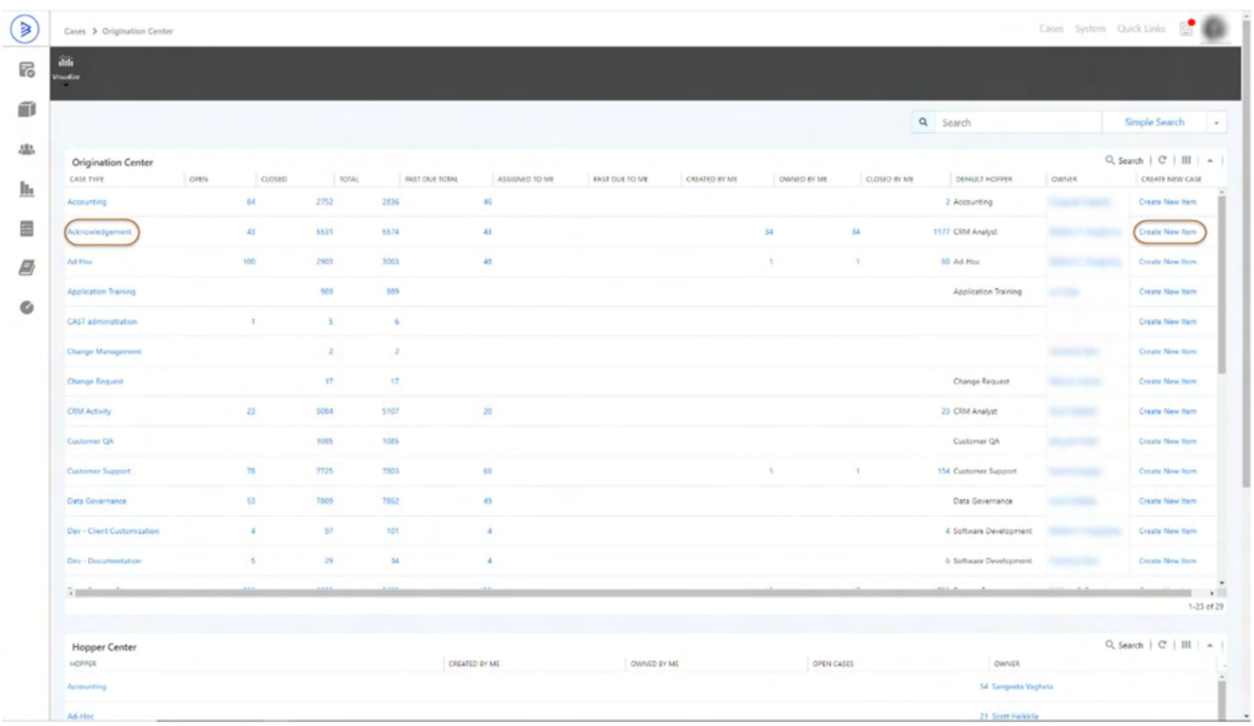
There are various ways to create a Case, please see different options below:

From Origination Center

To access Cases Origination Center, from main left navigation panel, select Cases → Origination Center.

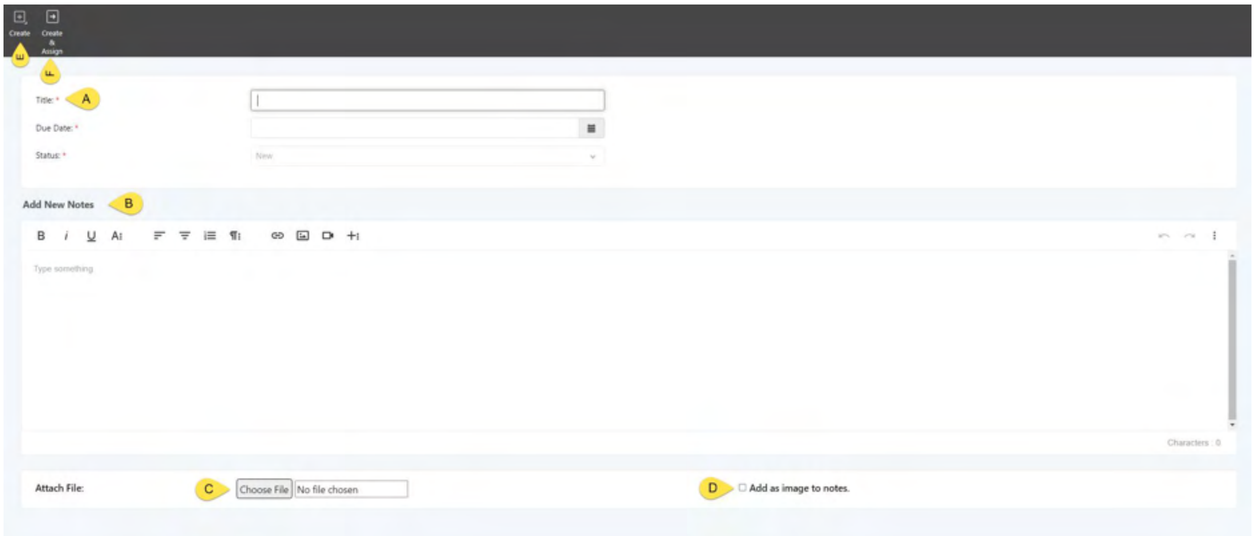


1. From Origination Center, you will see list of available Case Types. Find the Case Type and click on Create New Item.

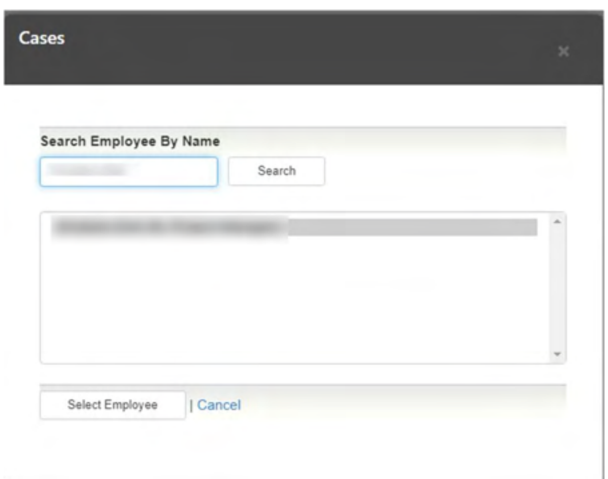


2. The New Case window will open, fill out all required and relevant fields.
    a. Required Fields are noted with red asterisk.
    b. Enter instructions about the case in Add New Notes.

c. Attach any supporting document via Attach File
d. Click on Add as image to notes if prefer to add the image file embedded in the Notes.
e. If the Case Type is set up with a default hopper assignment, click on Create to create the Case.
f. Or click on Create & Assign to create the Case and assign to a responsible person.



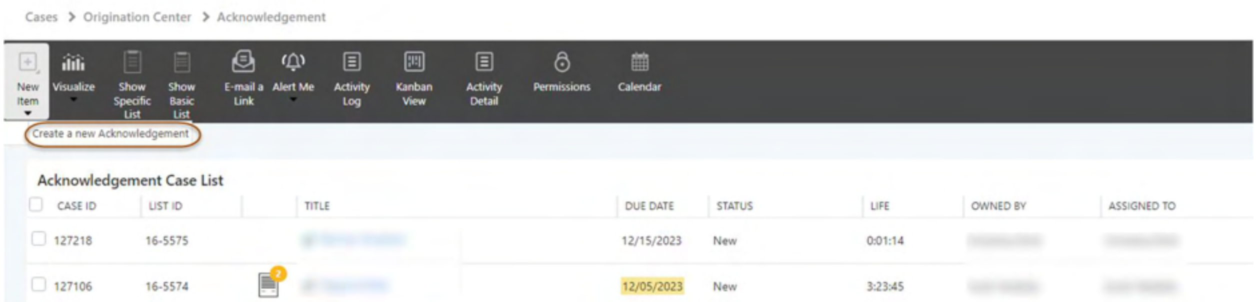
From Case Assignment screen, enter the responsible name, click on Search. Select the employee from the list and click on Select Employee.



From Case Type List

From Cases Origination Center, click on a selected Case Type from the list. The system will take the selected Case Type List.

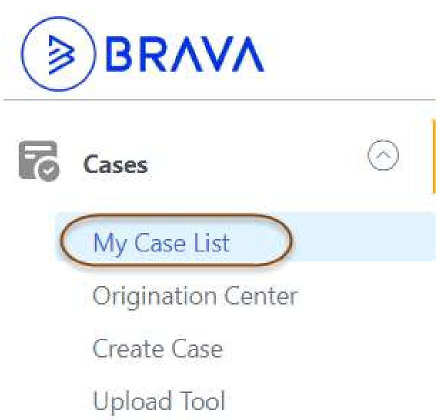
From Case Type List, select New Item and click on Create a new [Case Type Name]. The system will take you to the Create Case page.



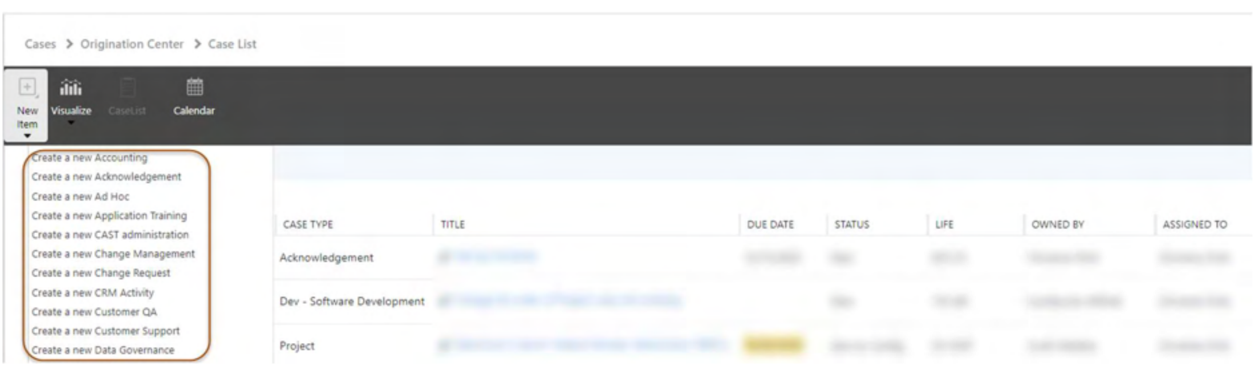
Follow instructions from Step 2 on how to create a case [From Origination Center].

From User's Case List

To access User's Case List, from main left navigation panel, select Cases → My Case List.



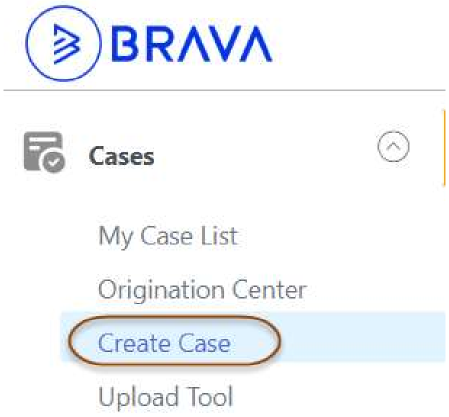
From User's Case List, click on New Item and select a Case Type to create the case via Create a new [Case Type Name].



Once in the Case Create page, follow instructions from Step 2 on how to create a case [From Origination Center].

From Create Case

User can create a case directly by accessing Create Case option from the main left navigation panel.



From Email

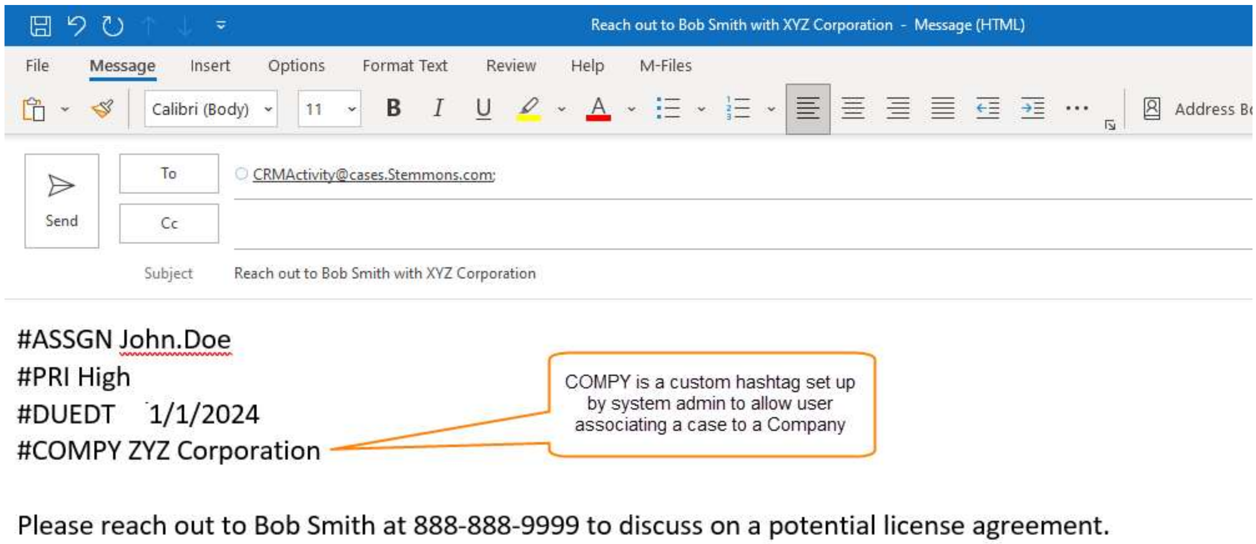
User can create a Case by sending an email to the Cases Application.

Below are the instructions on how to send an email to create a case and populate notes and metadata within the Case:

1. Send an email to CRMActivity@cases.yourdomanname.com will create a CRM Activity case. The format of the email address to send the case will be uniform across your organization: [Case Type Name]@cases.YOURDOMANNAME.com. Special characters and spaces should be removed from [Case Type Name].
2. The Subject Line of the email is equal to the Title of the Case.
3. In the body of the email, you can associate metadata about the task by using certain hashtags, click HERE to see a list of default hashtags available. Your organization can setup custom hashtags to be associated to custom fields. Please reach out to the system administrator of your organization for additional information).
   For example: Sending a CMR Activity Case, assign it to John Doe with Due Date of 1/1/2024 and Low Priority.

   #ASSGN – Assign to a User Name (ie. John Doe)
   #PRI – Level of Priority (Low, Medium, High, Critical, etc. this could be different based on configuration of the Case Type)
   #DUEDT – Due Date of Task (1/1/2024)

   Any email body that does not have a hashtag will become a note in the Case.



Note: the above email example will create a CRM Activity Case in the environment with below:

1. Title = “Reach out to Bob Smith with XYZ Corporation”
2. Case is assigned to John Doe
3. Priority = High
4. Due Date = 1/1/2024
5. Company = XYZ Corporation
6. Note = “Please reach out to Bob Smith at 888-888-9999 to discuss on a potential license agreement.

The system will automatically associate the sender as the Case Creator and Case Owner.

Default Email Hashtags

Action	Hashtag	System Code
Approve	#APPROVE	APPRO
Assign To	#ASSIGN TO	ASSGN
Assign To	#ASSIGN	ASSGN
Assign to	#ASS	ASSGN
Assign To	#ASSGN	ASSGN
Category	#CAT	CATEG
Category	#CATEGORY	CATEG
Close	#CLOSE	CLOSE
Decline	#DECLINE	REJCT
Due Date	#DUEDATE	DUEDT
Due Date	#DUE	DUEDT
Forward To	#FORWARD	FORWD
Priority	#PRIORITY	PRI

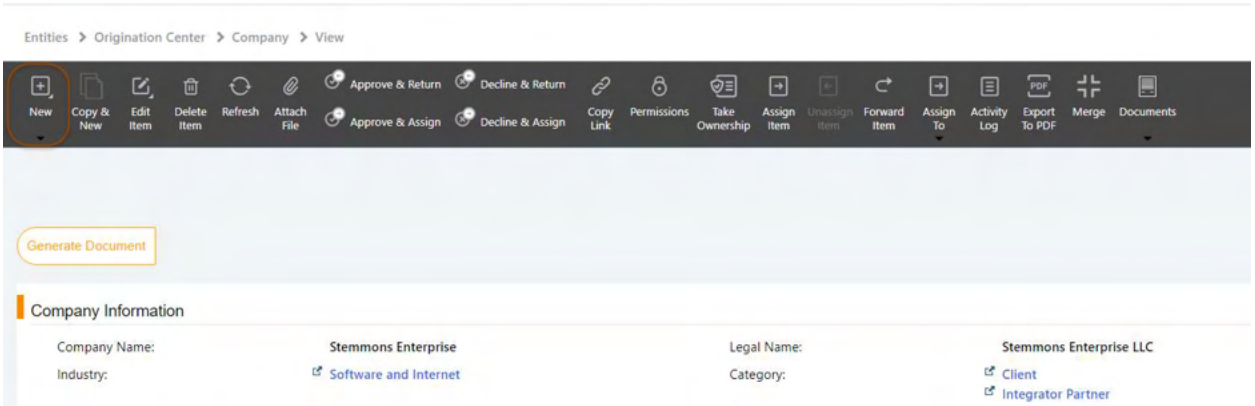
Priority	#PRI	PRI
Property	#PROP	PRPTY
Reopen	#REO	NEW
Resolve	#RESOLVE	CLOSE
Status	#STATUS	STTUS
Take Ownership	#TAKEOWNERSHIP	OWNER
Title	#TITLE	TITLE

From Entities Application

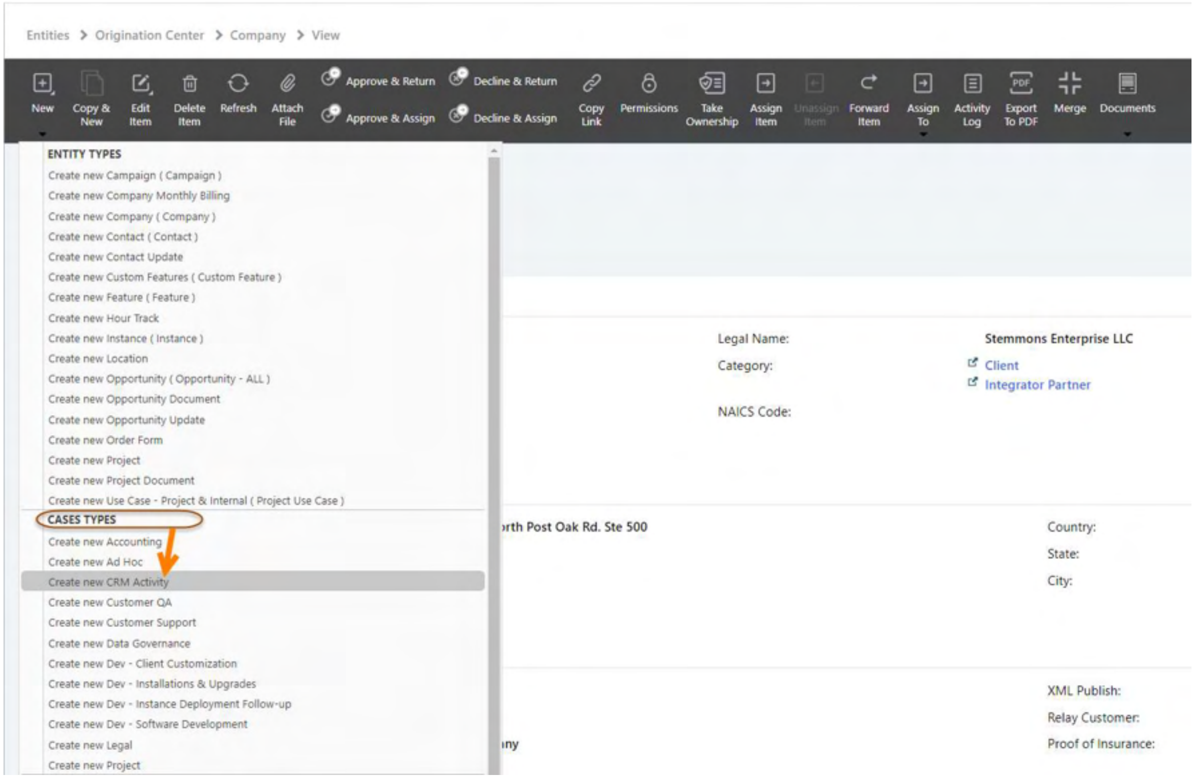
User can create a Case from Entities Application. For example, from a Company entity, user can create a "CRM Activity" case for that company.

To establish this relationship, the Entity Type (in this example, Company) is a data source for a field within a Case Type (in this example CRM Activity). That type of Case can be created directly from that Entity page.

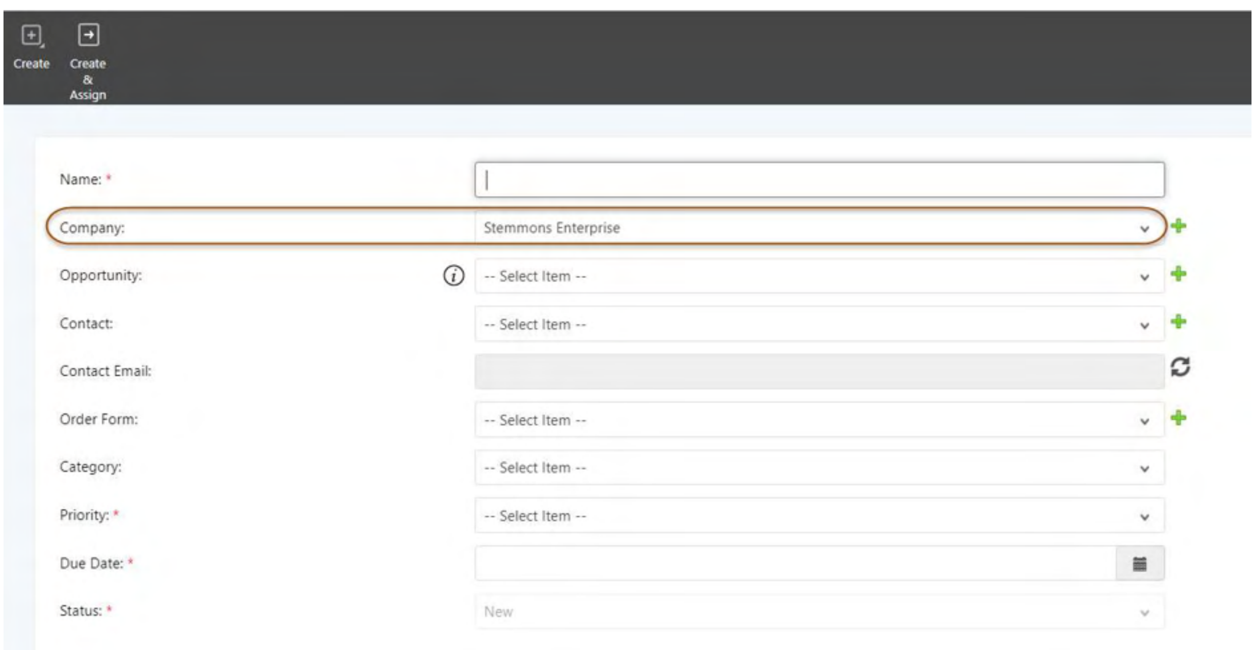
1. While viewing an Entity page, from the Entity Ribbon on top, click on "New".



2. Under CASE TYPES, select the Case Type that you desire to create.



3. New Case window will open. NOTE: the field that corresponds to the Entity page that you created the case from will auto-fill with that Entity.



Once in the Case Create page, follow instructions from Step 2 on how to create a case From Origination Center.

From the Cases Import Tool

User can upload multiple Cases via the Cases Import Tool. Follow HERE for instructions on downloading/installing and use of the Import Tool.

From Cast (Case Automation Scheduler)

User can create Cast Job to create occurring Cases (Daily, Weekly, Monthly, Yearly, etc.) via Cast. Follow HERE on for detail instructions on how to create Cast Job.

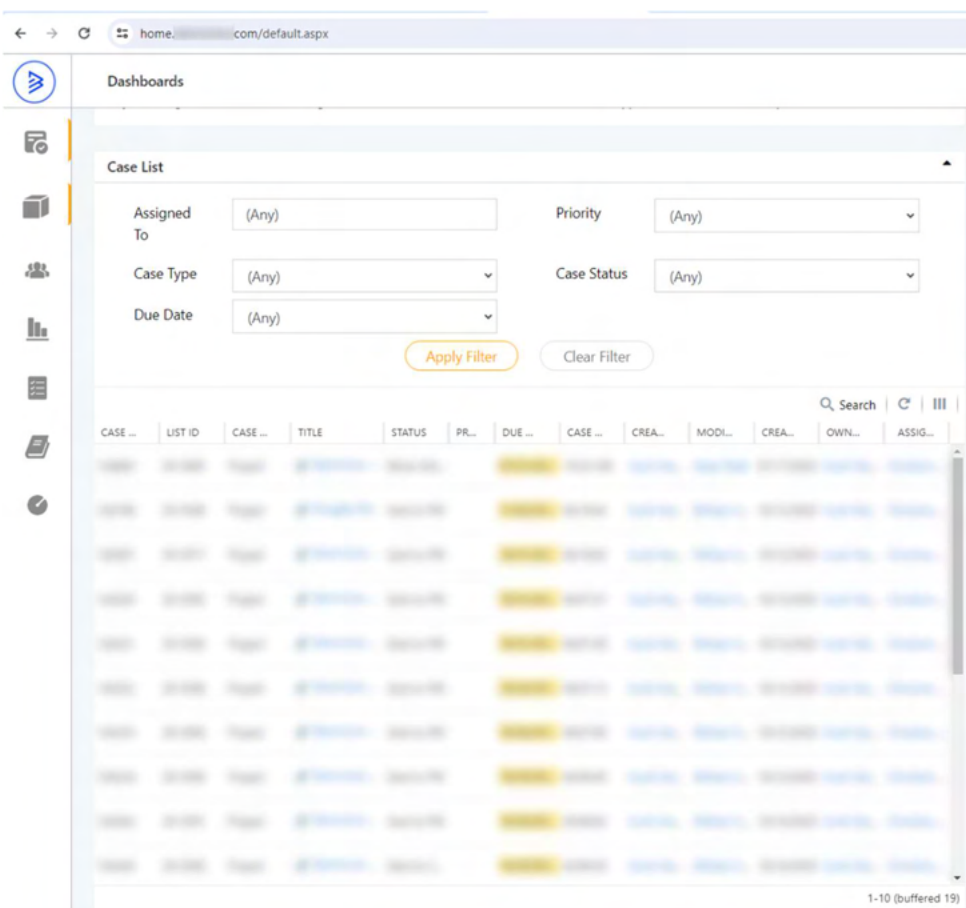
Accessing Personal Case List

There are various ways to access user's personal Case List, they are as follows:

Access the User's Case List from Homepage

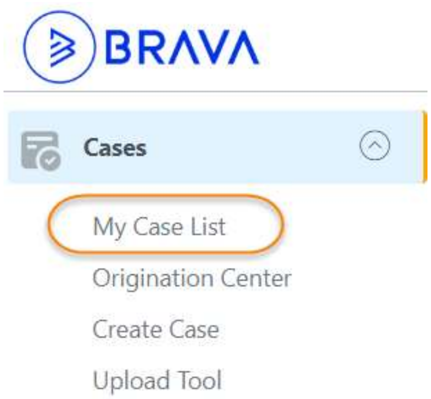
By entering your environment via the default URL: https://home.yourdomain.com as the URL in your browser, the Home page will open. The home page consists of the available Applications configured for your organization, a common Internal Posts and all data relevant to you.

Once you have a case assigned to you, the case will appear in the Case List. Filters are available for you to narrow down to the individual case that you are looking for.

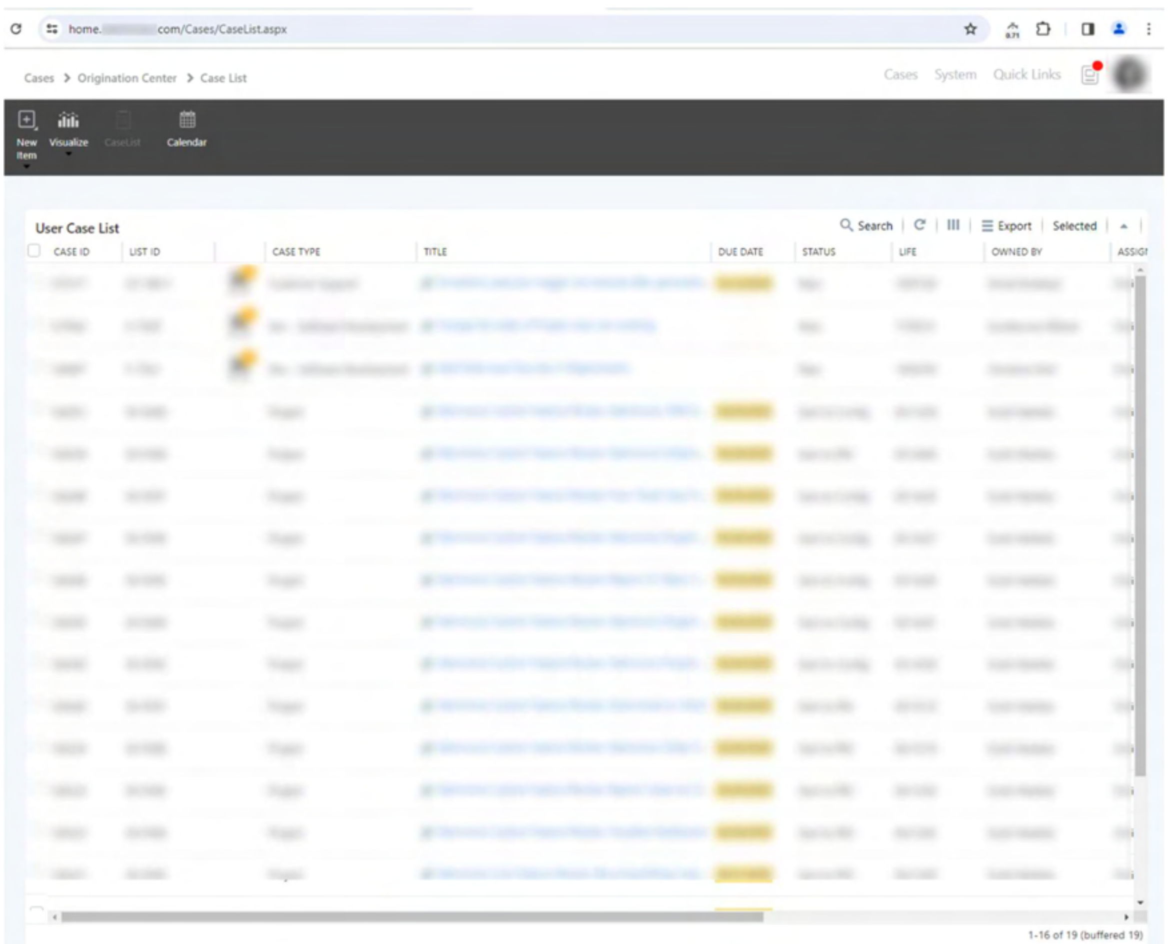


From User's Case List

By clicking on Cases Icon on the right main navigation and select Case List:



The system will take user to the Personal Case List.



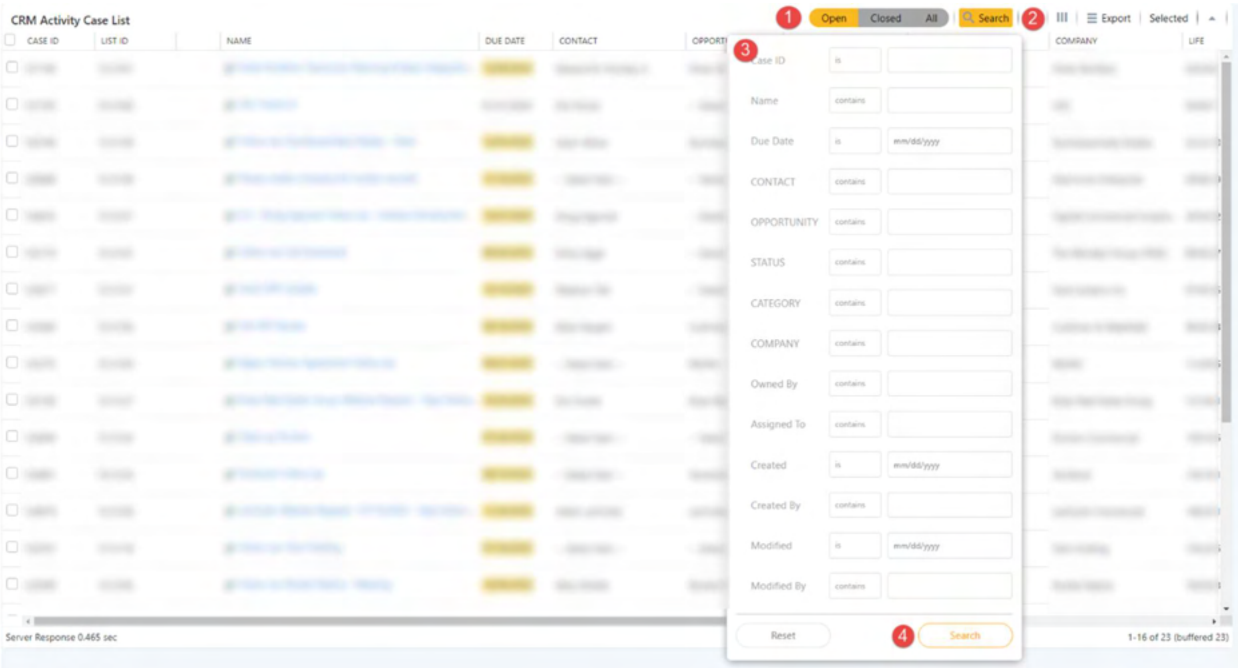
Search for Existing Case

There are multiple ways to search for an existing case.

Search for Existing Case from Origination Center

User can search for cases from the Cases Origination Center if the user knows the Case Type the case was created under. Click HERE on instructions on how to access the Cases Origination Center.

From Origination Center, select a Case Type. The system will take you a Case Type List. To search for a case, see options listed below on the Case Type List Header.



1. Open/Closed/All toggle: This option provides filtering the list of Open, Closed, or both open and closed Cases.
2. Click on Search, a search panel will expand to provide users the option to enter the search criteria.
3. Enter the value(s) in the fields you would like to search. *Note*: multiple fields can be entered to narrow the search criteria. The system will treat the values in the fields as an AND options. *For example*: **Company** "contains" XYX Corp AND **Created By** "contains" Bob Smith. This search option will return a list of all cases created by Bob Smith for XYZ Corp.

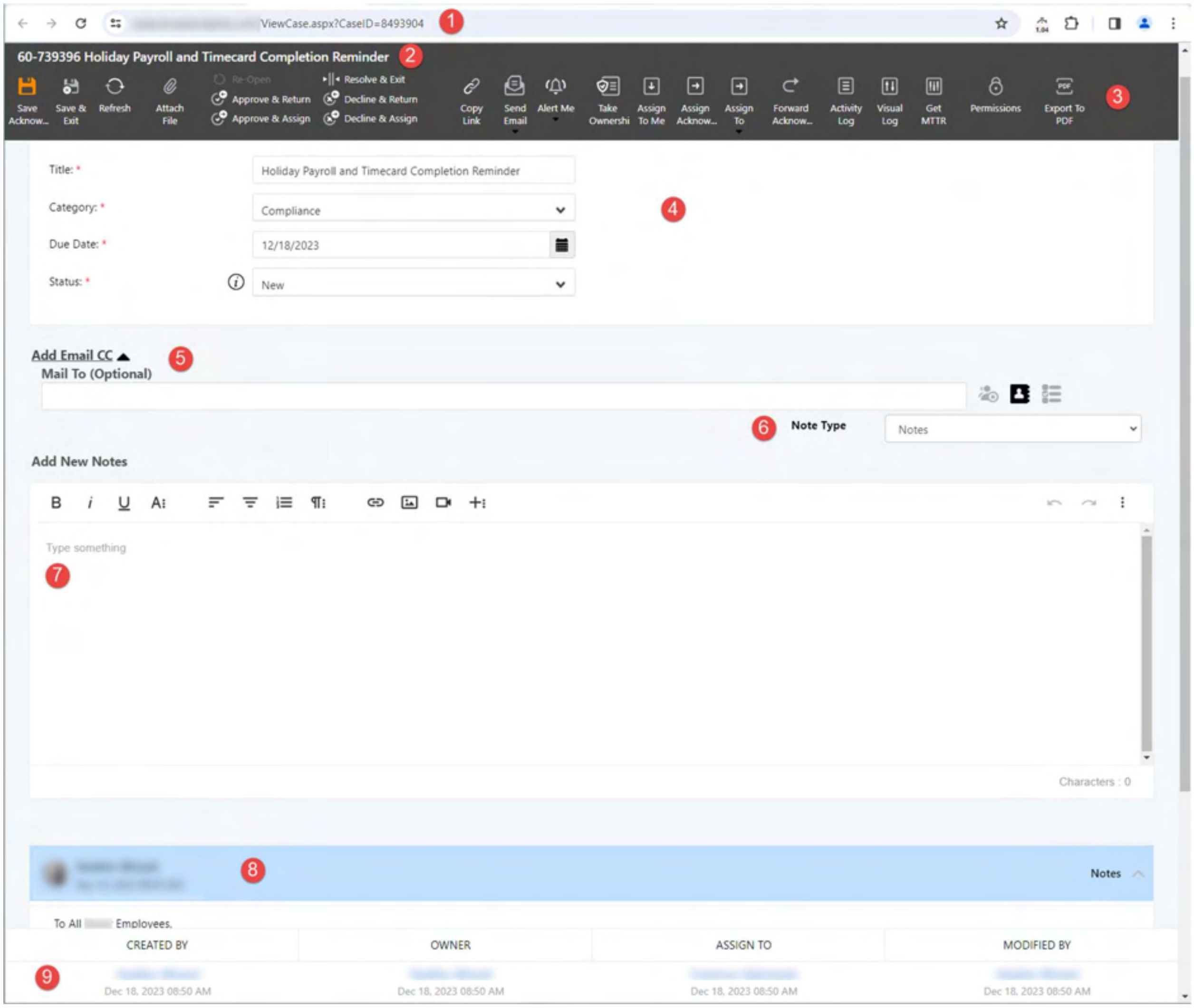
Search for Existing Case from Search Application

Click HERE for detailed instructions on how to search for Case data.

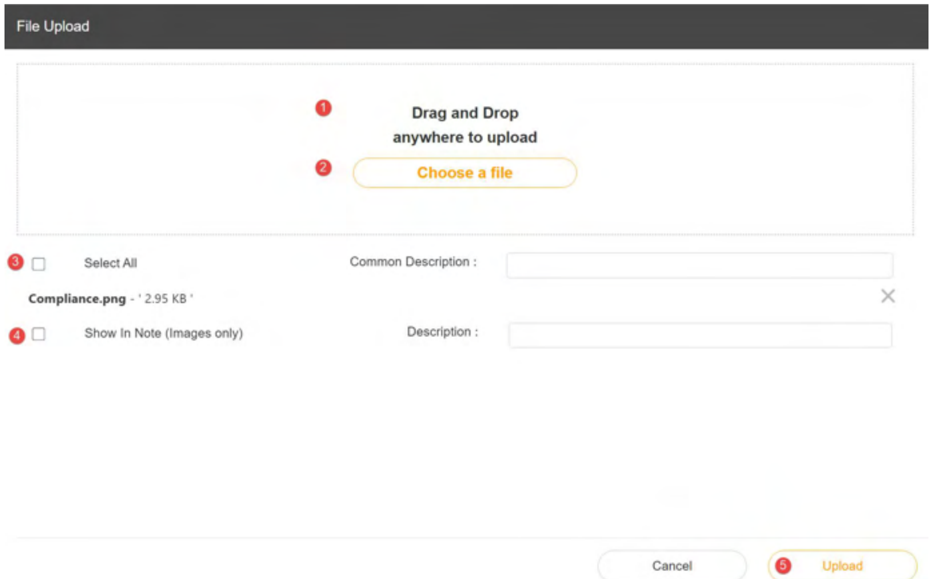
Interacting with a Case

Once you find the case you want to interact with, click on the hyperlink on the Case List/Case Type List to navigate to it. The system will take you to the Case page where you can add notes, attach the supported file, assign the case, etc.

Below are detail instructions on the functionalities behind each section and buttons on the Case page:



1. The number on the URL indicates the unique Case ID for entire Cases Application.
2. Provides Case Type ID – List ID and Title of the Case. Note: List ID is the unique identifier for the Case Type.
3. Ribbon Buttons:
    a. Save [Case Type Name]: When this button is clicked, any changes on the meta data and Notes entered in 7 will be saved. Modify By field in 9 will also be updated with your name and the time the case is updated. The window will remain open.
    b. Save & Exit: Same as 3a but the Case page will close and take you back to the List page.
    c. Refresh: Refresh the case window. *__NOTE__*: Any changes not saved will be lost.
    d. Attached File: Attach a file to a Case. Once clicked, the Attached File screen will open:



1. User can select one or more files and drag to the white area and drop the files. The dropped file(s) will be shown in the list.
2. Click on Choose a file and select a file to be uploaded.
3. This option allows a common Description noted in all the attachments to appear in notes.
4. Individual note can be added to the Description.
5. Click on Upload to upload the file(s) to the Case. The attachment(s) will be shown as a new Note.

e. Re-Open: Re-open a closed case. *NOTE*: Option only available on closed cases.
f. Approve & Return: Approve the case and return to the person who assigned it to you. This option will add “Approved” to the note.
g. Approve & Assign: This option will add “Approve” to the note and allow you to assign the case to a user.
h. Resolve & Exit: close the case once complete. Note: Closing a case does not erase it from the system. It will be moved to a Closed Case List.
i. Decline & Return: Decline the case and return to the person who assigned it to you. This option will add “Declined” to the note.
j. Decline & Assign: This option will add “Decline” to the note and allow you to assign the case to a user.
k. Copy Link: Case-specific URL will appear and can be copied to the clipboard
l. Send Email:
    i. E-mail a Link: This option will open a new Outlook message with the link to the case.
    ii. E-mail me this [Case Type Name] will send you an email notification in the format of a case response.
m. Alert Me:

        i. Set an alert on this [Case Type Name]: this option will subscribe you to the case. You will receive updates on the case as the notification is configured for your organization.
        ii. Remove an alert on this [Case Type Name]: this option will remove you from the subscriber list. ***NOTE***: this option will be enabled if you are a subscriber of the case.
    n. Take Ownership: click on this option will make you the owner of the case.
    o. Assign To Me: click on this option to assign the case to you.
    p. Assign [Case Type Name]: this option will take you to the assignment window to allow you to search for the user and assign the case to.
    q. Assign To: This option will provide you with a list of users who are associated with the case via: a role assignment or has worked with the case previously.
    r. Forward [Case Type Name]: this option allows you to forward the case to a user. It will take you to the screen to search for a user to forward the case to. Once chosen, that user will become the owner and the assignee of the case.
    s. Activity Log: provides the detail events happening to the case.
    t. Visual Log: provide the detail events happening to the case via a visual log.
    u. Get MTTR: view Mean Time to Resolution data.
    v. Permissions: if you have access to change the permission of the case, this option will allow you to grant or revoke user access to the case.
    w. Export to PDF: Export the case to a PDF file.

4. This section provides meta data about the case. Fields with red asterisks are required fields.
5. Add Email CC allows you to send the note of the case to the email address(s) noted in this field.

   Click on the User Selection icon  to search and add user(s) to receive the case notification. The user(s) in this field will receive a case link with the notes noted in Add New Notes (7) section. The user(s) will also be subscribed to the case to receive future notifications.
6. Note Types: choose appropriate Note Type.
7. Add New Notes: provides new notes to the case.
8. This section lists all prior notes in descending order.
9. Provides user stamp information such as who created the case, owner of the case, assignee, last modified user and the date time.

Cases Import Tool

Cases Import Tool allows mass import of cases into Cases application. Instead of having to manually create each case, the user will be able to use the Case Import Tool and create many cases through the Cases Import Tool. The Cases Import Tool allows the user to import multiple cases for the same Case Type as once.

The tool provides the user to download a template in a CSV format to ensure data are formatted correctly prior to the import. The file/template can be used to fill out list of cases to be imported.

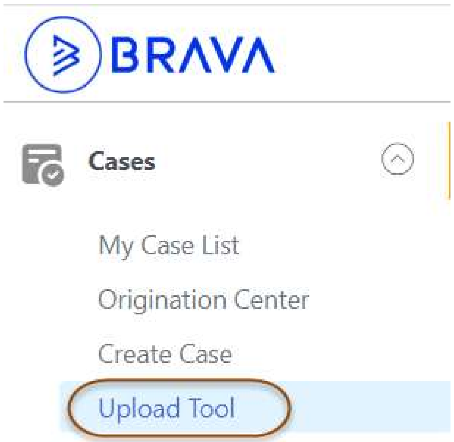
To review the process of installing and importing cases using the Cases Import Tool, please see below.

Steps to Install the Cases Import Tool

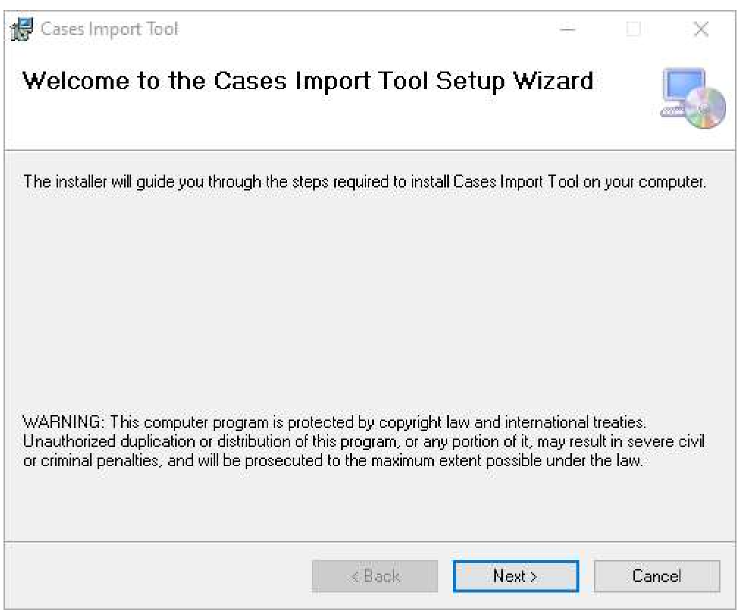
User can download a copy of the Cases Import Tool by navigating to Cases → Upload Tool from the main left navigation.

Following the steps below to install the tool:

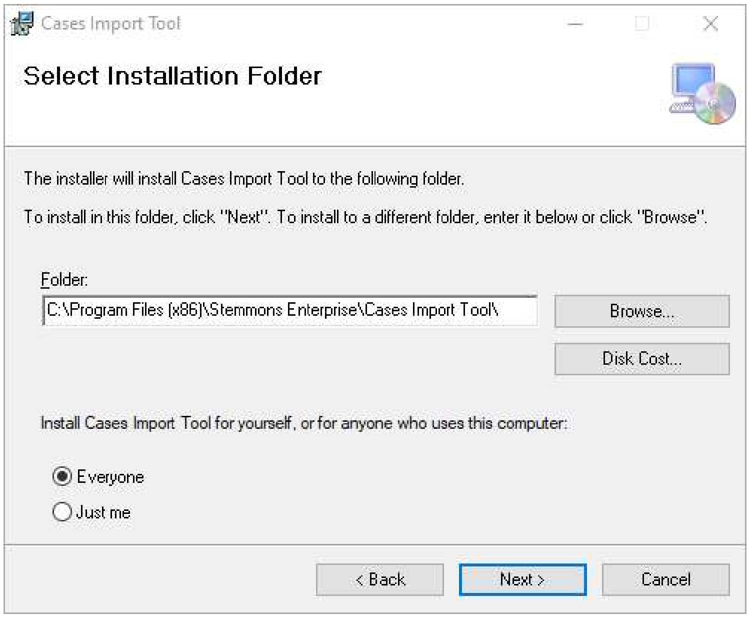
1. Download the Cases Import Tool via left navigation.



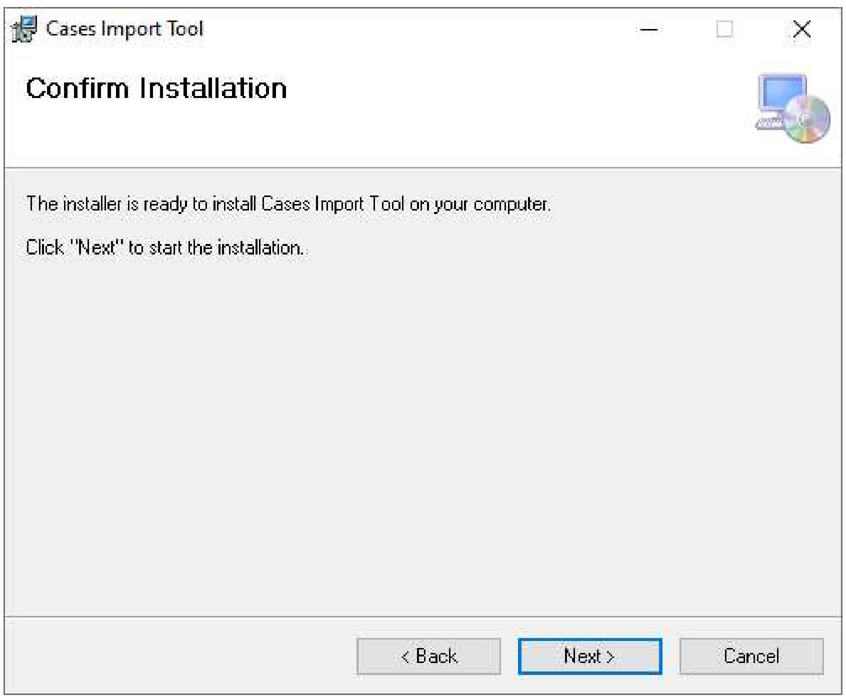
2. Find the CasesImportTool.msi file from download folder.
3. Double click on the CasesImportTool.msi to install the tool.
4. Run through the install set up to complete the installation. Note: The Import Tool requires local admin access to the desktop.
    a. Welcome to the Wizard screen:



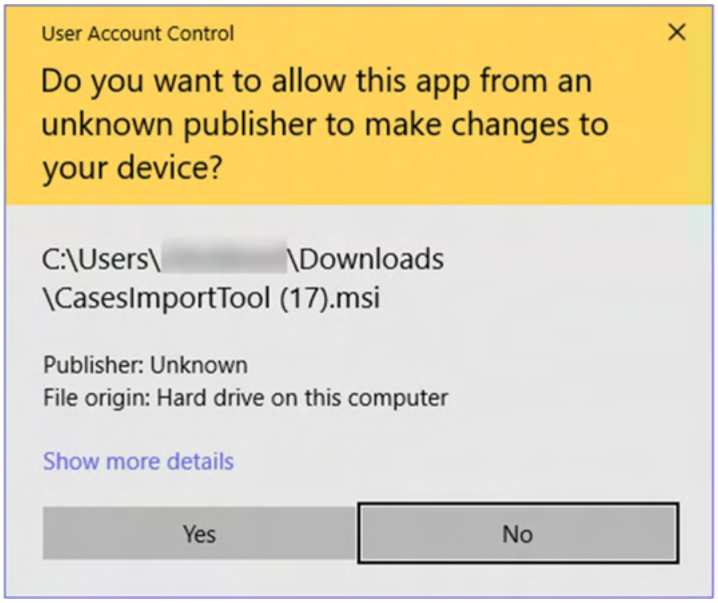
    Click on Next
    b. Select Installation Folder: choose appropriate folder where the tool should be installed (or leave as default) and click on Next:



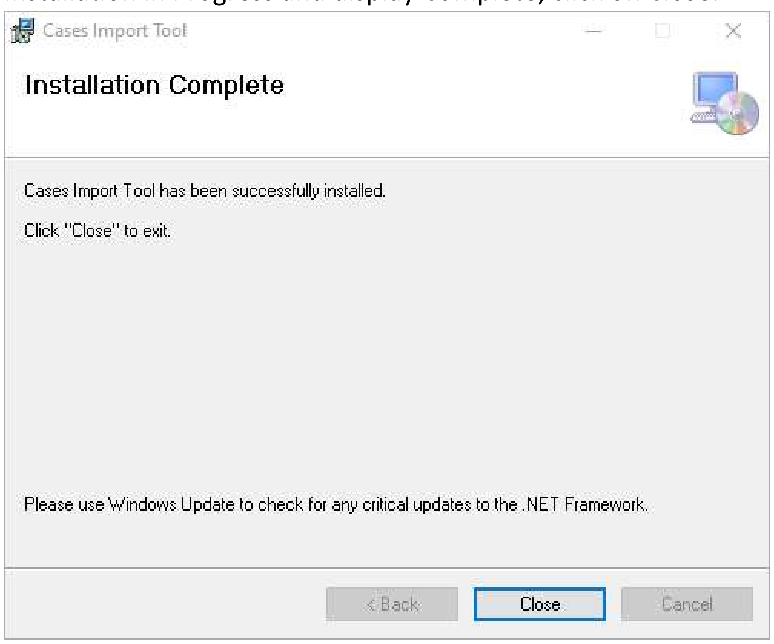
c. Confirm Installation: click on Next.



d. Confirmation to allow the app to do the installation, click on Yes:



e. Installation in Progress and display Complete, click on Close:

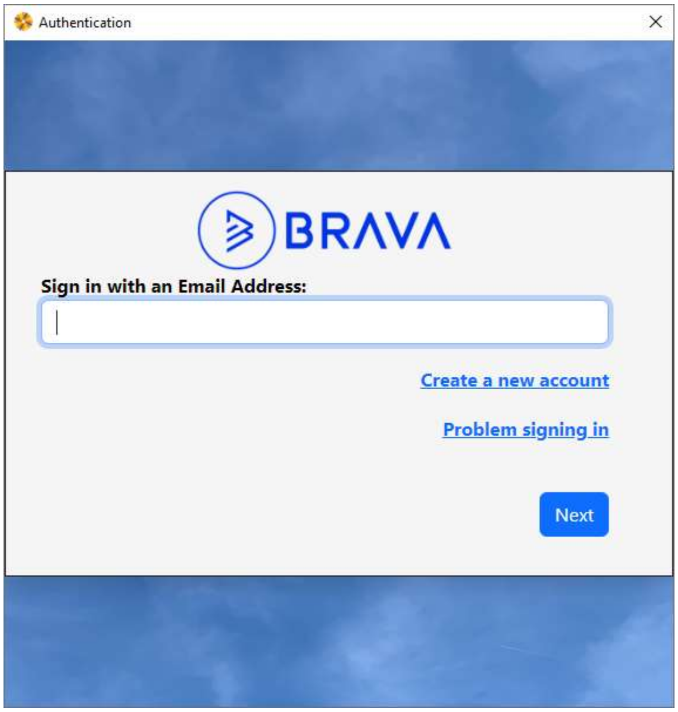


Steps to Import Cases Using Cases Import Tool

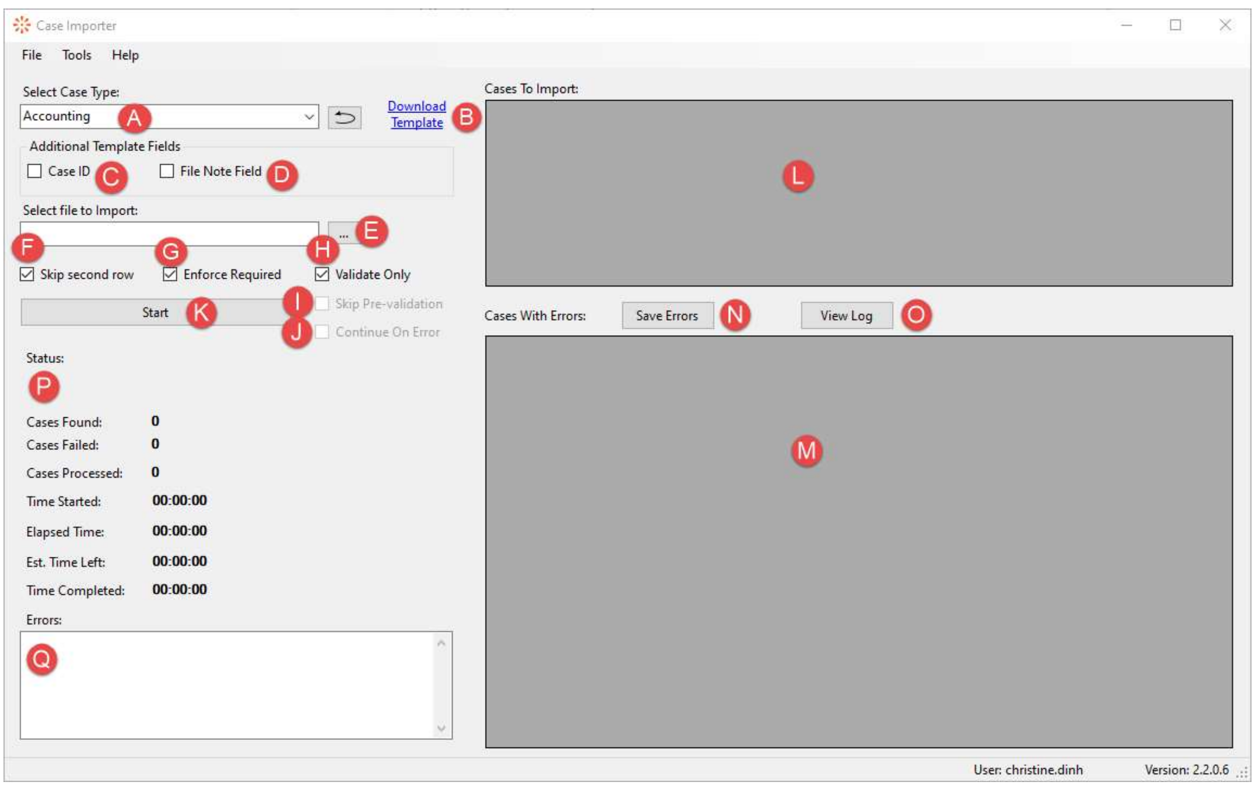
Follow the steps below to import mass cases into the system:

1. Open the Cases Import Tool by entering Cases Import Tool from the Windows Start Menu:

2. The application will launch an authentication page, login to the system as you normally do:



3. Once successful logged in, the Cases Import Tool will open. Below provides information about each of the options available:



a. Select a **Case Type** to import.
b. Click on **Download Template** to download a template and fill out the data to be imported.

c. Click on **Case ID** checkbox if you would like to update existing cases then click on Download Template. This option will provide the user with a Case ID column to include in the import. If Case ID is provided the system will update them with additional metadata or notes. **Very important note**: Do not leave the other meta data column blank (unless you intentionally want to blank out the value for the field). If the column is left blank, the Case Import Tool will blank out the value in the case. If no update is needed in a metadata field, simply remove that column from the import file.
d. Click on **File Note Field** if you would like to include a Note field in the template. This note field will allow the user to enter a note for the imported case. This option can be used for both newly created cases or case updates. Once checked, click on Download Template to download the template with Note Field column.
e. Once the template is filled out with the list of cases to be newly created or updated. Click on … button next to field "Select file to Import" to upload the file.
f. In the template it provides the data type in the second row. Leave "**Skip second row**" checked (as default unless that row is removed from the template).
g. Check **"Enforce Required**" if you would like to Import Tool to validate against the Case Type configurations and only allow cases with all required field filled in to be imported.
h. Check "**Validate Only**" option to validate your import file for accuracy prior to importing.
i. Once Validate is completed, uncheck this option to import the data. If you would like to skip the validation prior to import the cases, check option "**Skip Pre-validation**". This option will be enabled once the Validate Only option is unchecked.
j. Check option "**Continue On Error**" if you would like to import the valid cases and skip the ones in errors. If this option is unchecked, the Import Tool will not import any cases until the entire import file's errors are corrected.
k. Click on **Start** to Start the import.
l. This area will display the list of cases to be imported.
m. This area will display the list of error cases.
n. Once the import is complete, user can click on Save Errors option. This option will save the errors into an error file and allow users to correct the errors and reimport.
o. View Log provides a log file for the import.
p. This area provides detail progress about the import.
q. General errors will be provided in this section.

Once the import is completed, user can verify the imported cases by going to the Origination Center, select the Case Type and verify the cases.

Entities Application

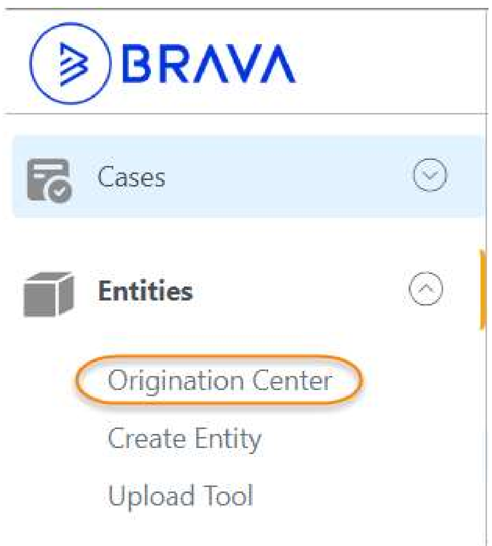
This guide provides instructions on how to create and interact with Entities.

Creating an Entity

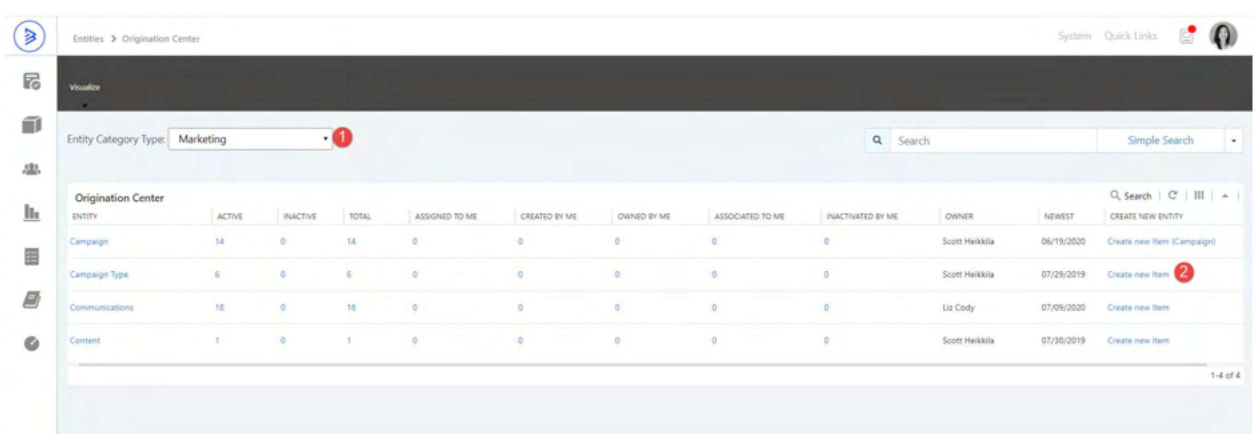
There are various ways to create an entity, please see options below:

From Origination Center

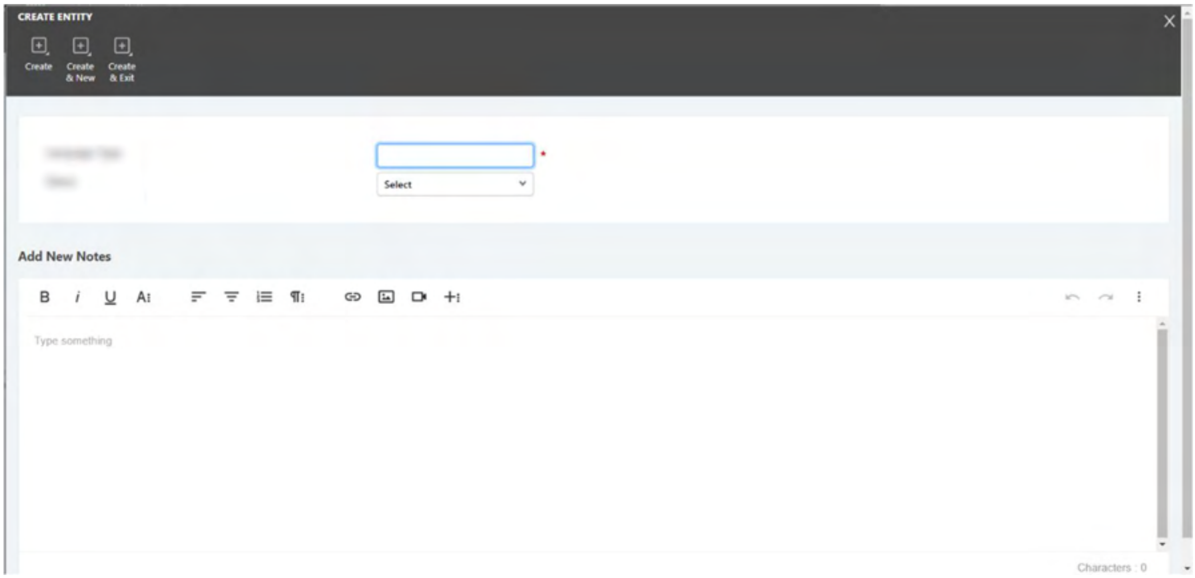
To access Entities Origination Center, click on the left navigation pane, expand Entities application, and select Origination Center.



1. From Origination Center, the Entity Types are classified with an Entity Category Type. (1) Select the appropriate Category or All. The system will provide list of available Entity Types. (2) Find the Entity Type and click on Create New Item.



2. The New Entity window will open, fill out all required and relevant fields.

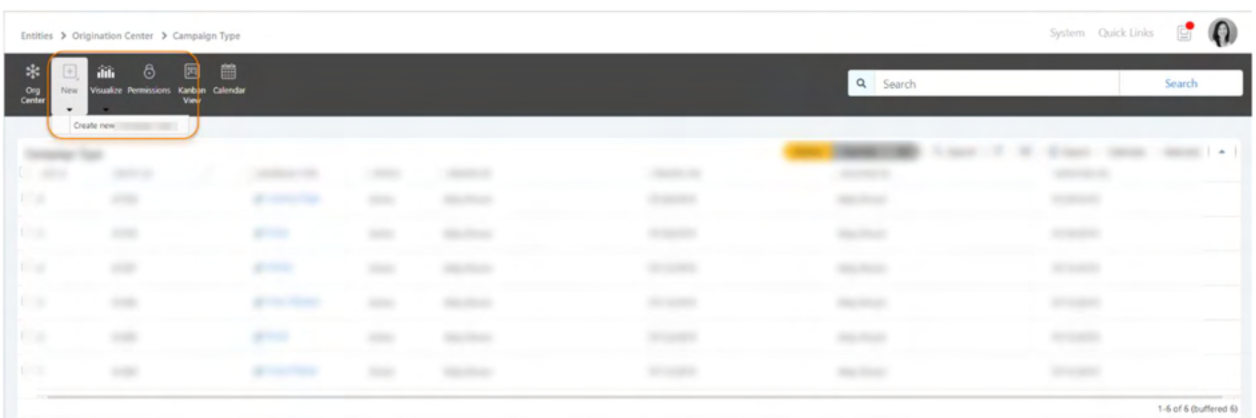


a. Required Fields are noted with red asterisk.
b. Enter notes about the entity in Add New Notes as needed.
c. From ribbon button, click on:
   i. Create: create the entity. Once create, the system takes you to the entity view page.
   ii. Create & New: create the entity and clear the window ready to enter a new one.
   iii. Create & Exit: create the entity and takes you back to the List.

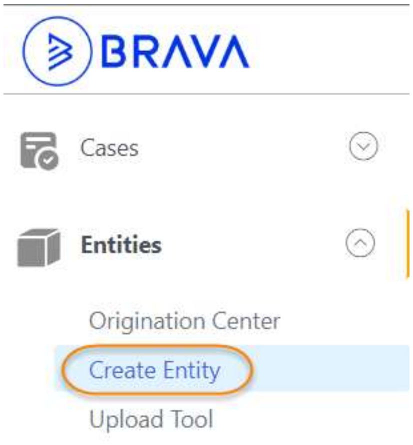
From Entity Type List

From Entity Origination Center, select an Entity Type by clicking on the Entity Type Name.

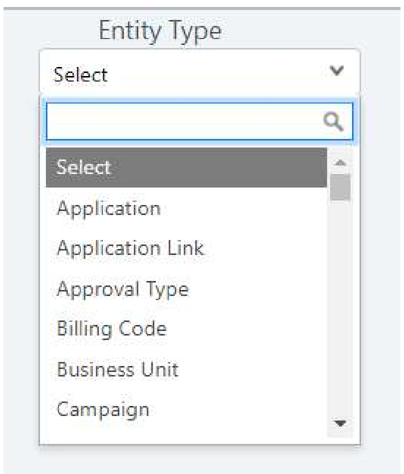
From button ribbon on top, select New → Create new [Entity Type Name].



From Create Entity

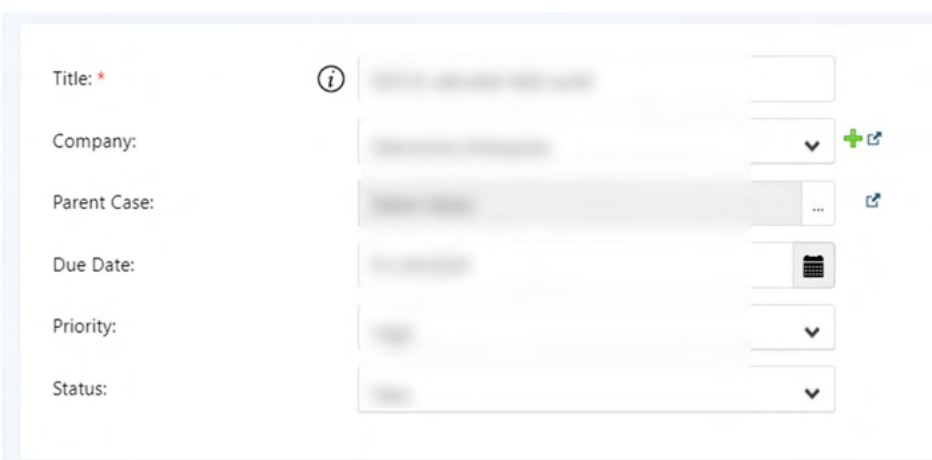


The system will prompt you to select an Entity Type:



From External Datasource Field

In all Applications (Cases, Entities, and Quest), when the item has a field with data type of External Datasource that references to an Entity Type, the system provides a shortcut to jump to the entity create page by clicking on the + icon ( ) next to the field (in edit mode):



From Entities Import Tool

User can upload multiple Entity items via the Entities Import Tool. Follow HERE for instructions on downloading/installing and use of the Import Tool.

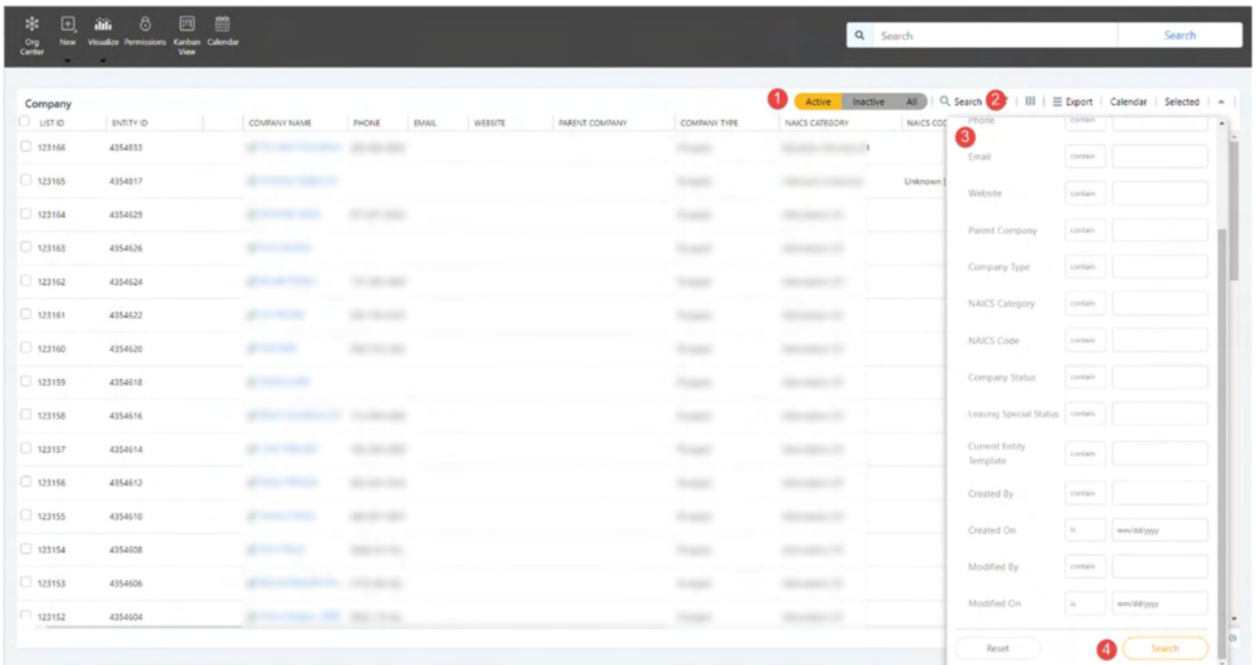
Searching for an Entity

There are multiple ways to search for an existing case.

Search for Existing Entity from Origination Center

User can search for entities from the Entities Origination Center if the user knows the Entity Type the entity was created under. Click HERE on instructions on how to access the Entities Origination Center.

From Origination Center, select an Entity Type. The system will take you a Entity Type List. To search for an entity, see options listed below on the Entity Type List Header.



1. Active/Inactive/All toggle: This option provides filtering the list of Active, Inactive, or both active and inactive Entities.
2. Click on Search, a search panel will expand to provide users the option to enter the search criteria.
3. Enter the value(s) in the fields you would like to search. *Note*: multiple fields can be entered to narrow the search criteria. The system will treat the values in the fields as an AND options. *For example*: **Company** "contains" XYX Corp AND **Created By** "contains" Bob Smith. This search option will return a list of all cases created by Bob Smith for XYZ Corp.

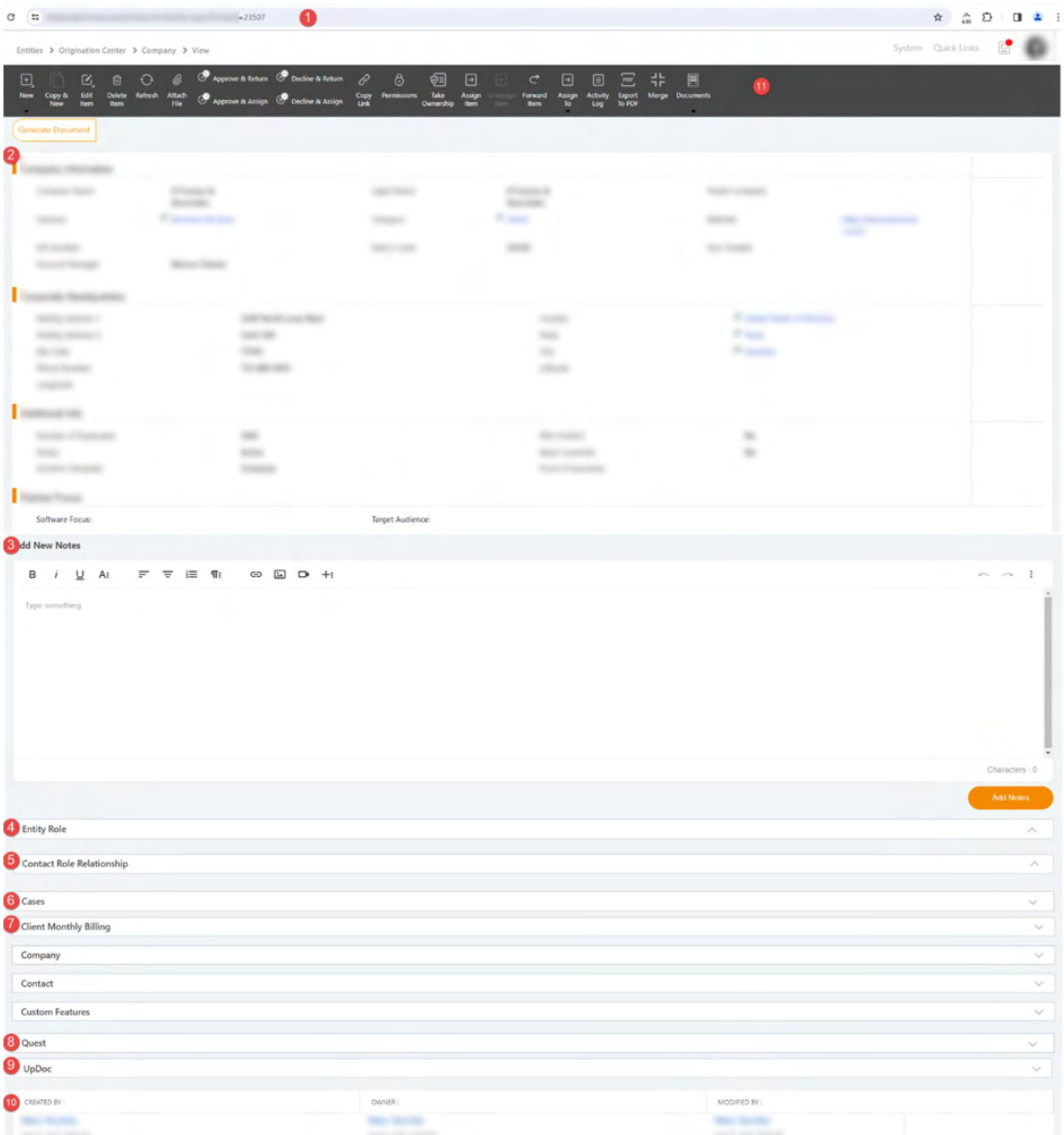
Search for Existing Entity from Search Application

Click HERE for detailed instructions on how to search for data.

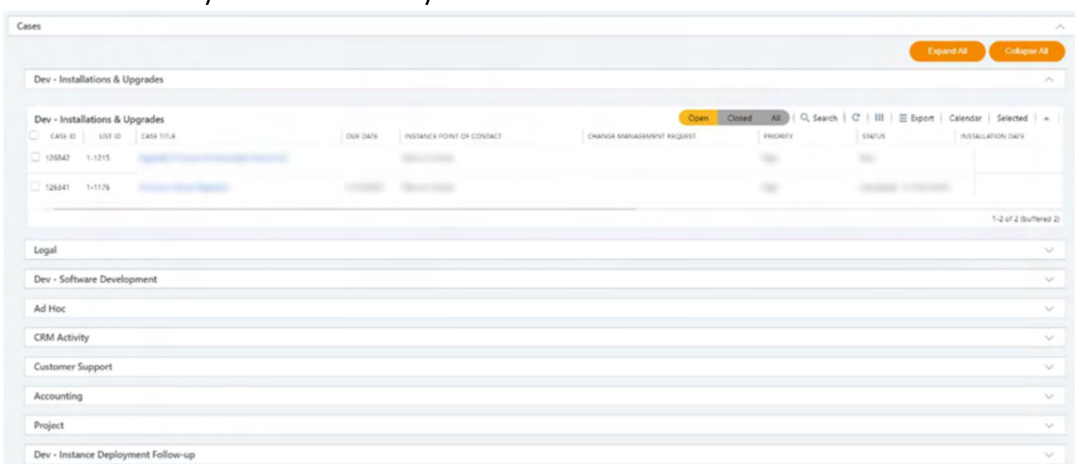
Interacting with an Entity

Once you find the entity you want to interact with, click on the hyperlink on the Entity Type List to navigate to it. The system will take you to the Entity view page where you can view detailed information about the entity and its relationships, cases and quest forms associated with the entity. You can also update metadata, add notes, and attach the supported file, etc.

Below are detail instructions on the functionalities behind each section and buttons on the Entity View page:

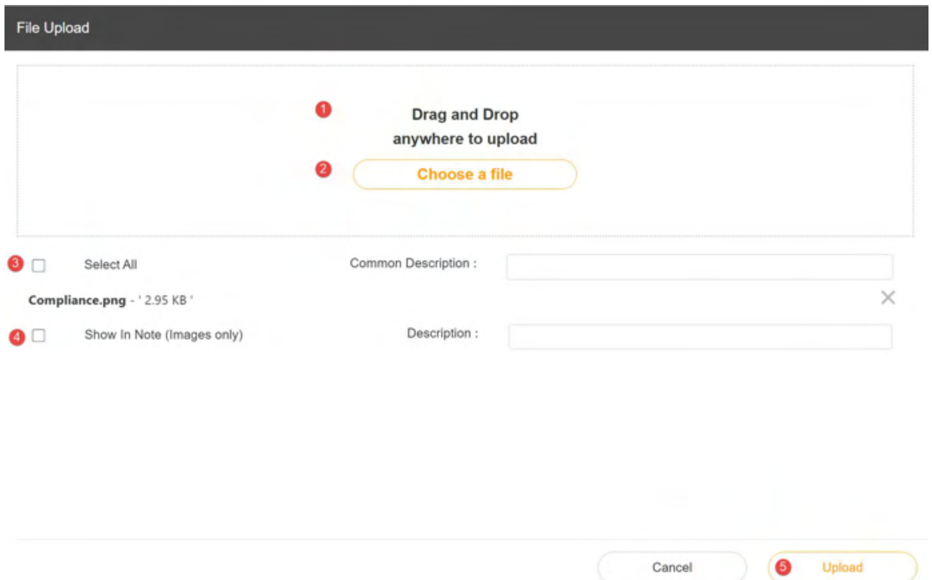


1. The number on the URL indicates the unique Entity ID.
2. Detailed information about the entity.
3. Add New Notes: Individual notes can be added.
4. Entity Role: If configured, this area will list the employee(s)/user(s) who is associated with the entity via a role. For example: Bob Smith (employee) - Account Manager, Heather Smith – Marketing Manager, etc.
5. [Entity to Entity] Role Relationship: If configured, any entity related to the selected entity via a role will be listed here. For example, Joe Blo (a contact for this selected company entity) – Primary Contact, etc.
6. Cases: this section, when expanded, will include a list of Case Types with cases associated to the entity. The user can expand/collapse all Case Type list or can expand individual Case Type. Each Case Type List will load open cases as default but allow users to switch to Closed cases or all via the header navigation. The option to search for individual cases is also available as is any other list in the system.



7. Entity Relationship: This section will include all Entity Types that relate to the selected entity via External Data source. For example, Company has Contact, Billing, etc. Individual related Entity Type(s) will be listed like Cases List.
8. Quest: same as Cases section, Quest forms associated with this entity will be listed in this section.
9. UpDoc: if this entity type is an Updoc (Document Management) entity type, any documents associated with this entity will be stored as an UpDoc. This section will show a list of documents and allow users to open the document in UpDoc Application.
10. User Stamp Information such as who created the entity, when it was created and who modified the entity and when it was last modified.
11. Ribbon Buttons:
    a. New: when dropdown this ribbon button will provide a list of related Entity Type, Case Types, and Quest Items to allow user to create the record directly from the entity. The associated field (normally via an Item Lookup or External Data source) will be populated with the selected entity.
    b. Copy & New: allow user to copy the entity into a new entity. Once copied, the user can edit and update the new entity accordingly.

c. Edit Item: takes the user to Edit mode and allows updates. Once in Update mode, the user will have the option to save the record.
d. Delete Item: delete the record. *NOTE*: only Entities without any related cases, entities, or quest forms can be deleted. Best practice is to inactivate a record rather than delete it. It is also common practice for only administrative users to have the ability to delete, as such the delete icon may be disabled for a Standard User.
e. Refresh: refresh the entity with the latest data.
f. Attached File: Attach a file to an Entity. Once clicked, the Attached File screen will open:



1. Users can select one or more files and drag them to the white area and drop the files. The dropped file(s) will be shown in the list.
2. Click on Choose a file and select a file to be uploaded.
3. This option allows a common Description noted in all the attachments to appear in notes.
4. An individual note can be added to the Description.
5. Click on Upload to upload the file(s) to the Entity. The attachment(s) will be shown as a new Note.

j. Approve & Return: "Approve" will be added to the notes and the Entity will be assigned back to the user who assigned the entity to you.
k. Decline & Return: "Decline" will be added to the notes and the Entity will be assigned back to the user who assigned the entity to you.
l. Approve & Assign: "Approve" will be added to the notes and allows you to assign the Entity to another user.
m. Decline & Assign: "Decline" will be added to the notes and allows you to assign the Entity to another user.
n. Copy Link: a link to the Entity will be provided to allow copying to clipboard.
o. Permissions: if you have access to change the permission of the Entity, this option will allow you to grant or revoke user access to the Entity.

p. Take Ownership: Allows you to take ownership of the Entity. Once you take ownership, the Entity will be available in the Entity list on your Homepage.
q. Assign Item: allows you to assign the Entity to a user.
r. Unassign Item: If the Entity is assigned to a user, this button will be enabled to provide user option to unassign the Entity.
s. Forward Item: allows you to Forward the Entity to a user. Once forwarding, the user will become the Owner and the Assignee of the Entity.
t. Assign To: this option provides you with a list of users who associated to the Entity via a role or have visited the Entity record previously. This option allows you to assign the Entity quickly without having to search for the user. Once the user in the list is selected, the Entity will be assigned to that user.
u. Activity Log: provides the details of events happening to the Entity.
v. Export to PDF: Export the Entity to a PDF file.
w. Merge: If configured, it will provide you with the option to merge multiple Entities into one.
x. Document: provides list of files/documents associated with the Entity.

Entities Associations

There are three types of Entity Associations within the Entities Application. The association is configured at the Entity Type level and available for use in all entities in that Entity Type.

Each association has a different purpose and allows the organization to use these associations as a tool to manage their operations.

Entity Role Association

Associating an employee/user to an entity via a role.

<u>Data example:</u>

"Bob Smith" is the "Marketing Coordinator" (role) of company "XYZ Corp" (entity).

"Jane Smith" is the "Property Manager" (role) of property "123 Main Street" (entity).

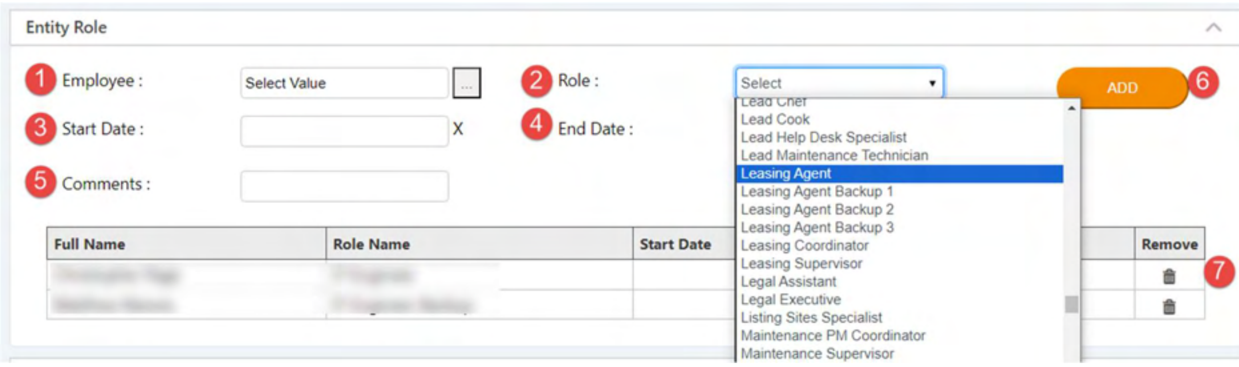
<u>How it works:</u>

Once an Entity Role Association is configured by the system admin, in the Entity Edit page, user will have the option to associate an employee to the entity via a role. This feature is extremely useful and plays as a key concept within Entities Application:

1. Quick access to the entity: With the above example, when being associated with the company or property entity, the users (Bob Smith and Jane Smith) will have an association to XYZ Corp and 123 Main Street entity respectably. They then will have quick access to the entity via their homepage.
2. Cast jobs can also be created to assign cases to the users via a selected role. For example: monthly Interior Building Inspection cases to be generated and assigned to the "Property Manager" of every property. Once the job runs, Jane Smith will receive a case to inspect the interior of the building that she manages.

3. A roster will be available via “Assign To” option in Cases: List of users who are associated with the entity via a role will be available in the Assign To option to allow quick assignment access.

To add a user to an entity role association, find the entity, from action ribbon, click on Edit. Once in Edit mode, scroll down to the Entity Role section and expand the section header.



1. Search for the employee
2. Select a role
3. Select Start Date (where appropriate)
4. Select End Date (where appropriate)
5. Enter a Comment (where appropriate)
6. Click on ADD
7. If the employee is no longer in the role, remove by clicking on the Remove button.

Entity Type Association

Associating an employee/user to an entity without a role.

Data example:

“Jane Smith” is an employee at property “123 Main Street” (Property entity).

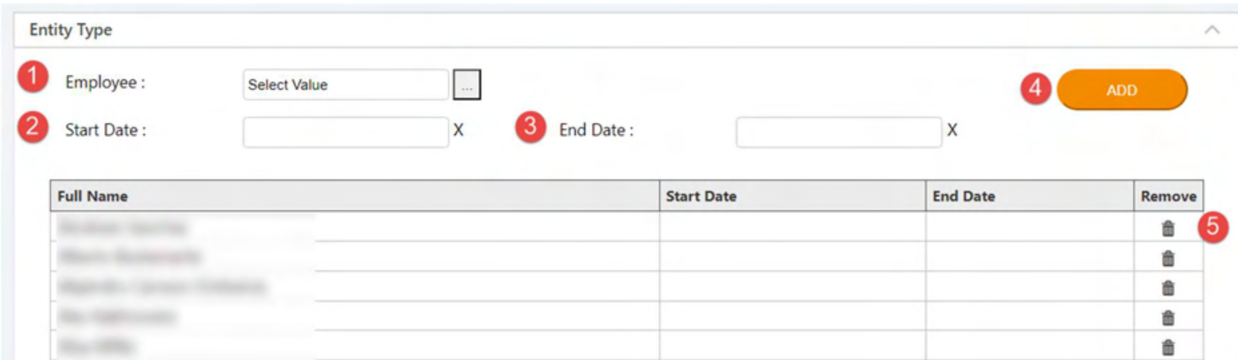
“Jane Smith” resides in “Houston” Market (Market entity).

<u>How it works:</u>

Once an Entity Type Association is configured by the system administrator, in the Entity Edit page, user can associate an employee to the entity. This feature is extremely useful and plays as a key concept within Entities Application:

1. Quick access to the entity: With the above example, when being associated with the market or property entity, the user (Jane Smith) will have an association to 123 Main Street entity. They then will have quick access to the entity via their homepage.
2. Cast job can also be created to assign cases to the users who are associated to the entity. For example: Cases to be generated and assigned to all employees associating to “123 Main Street” regarding a power outage at the property. Once the job runs, Jane Smith will receive a case informing her about the power outages.
3. A roster will be available via “Assign To” option in Cases: List of users who are associated with the entity via a role will be available in the Assign To option to allow quick assignment access.

To add a user to an entity type association, find the entity, from action ribbon, click on Edit. Once in Edit mode, scroll down to the Entity Type section and expand the section header.



1. Search for the employee
2. Select Start Date (where appropriate)
3. Select End Date (where appropriate)
4. Click on ADD
5. If the employee is no longer in the role, remove by clicking on the Remove button.

Entity to Entity Association

Associating an entity to another entity via a role. This option allows the organization to set up the relationship between different entity types and associating the individual entity to another entity via a role.

<u>Data example:</u>

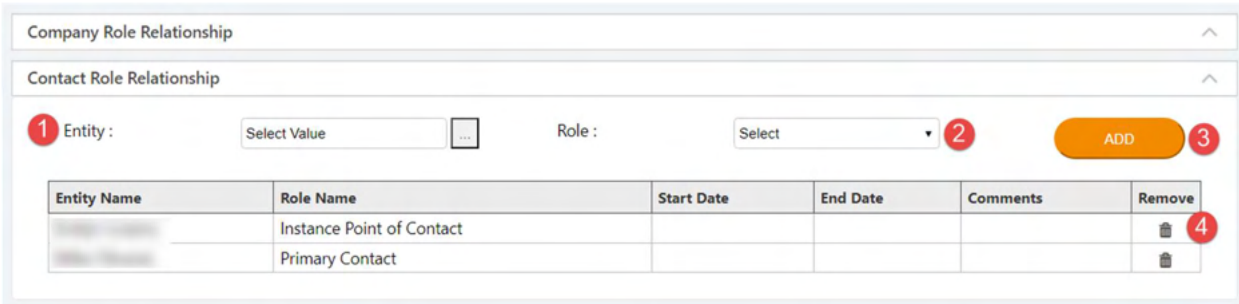
“ABC Company” (Company entity) is the “Parent Company” (role) of “XYZ Corporation” (Company entity).

“James Clifton” (Contact entity) is the “Primary Contact” (role) for “XYZ Corporation” (Company entity).

<u>How it works:</u>

Once an Entity-to-Entity Association is configured by the system administrator, in the Entity Edit page, user will have the option to add the association to the other entity via selected role.

To add the relationship to entities association, find the entity, from action ribbon, click on Edit. Once in Edit mode, scroll down to the section with the association (in the example below, Company Entity Type was configured to associate to Company and Contact) and expand the appropriate section header.



1. Search for the entity record.
2. Select a Role
3. Click on ADD
4. If the entity is no longer valid in that role, click on the Remove button.

Entities Import Tool

Entities Import Tool allows mass import of entity items into Entities application. Instead of having to manually create each entity, the user will be able to use the Entities Import Tool and create many entities through the Entities Import Tool. The Entities Import Tool allows the user to import multiple entities for the same Entity Type as once.

The tool allows the user to download a template in a CSV format to ensure data are formatted correctly prior to the import. The file/template can be used to fill out a list of entity items to be imported.

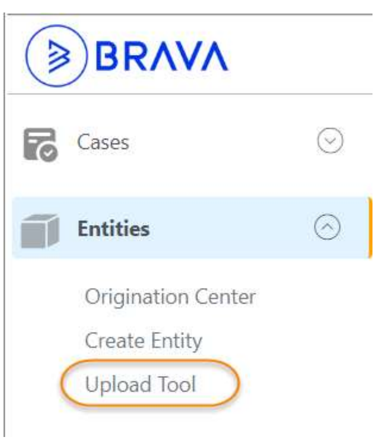
To review the process of installing and importing entities using the Entities Import Tool, please see below.

Steps to Install the Entities Import Tool

The user can download a copy of the Entities Import Tool by navigating to Entities → Upload Tool from the main left navigation.

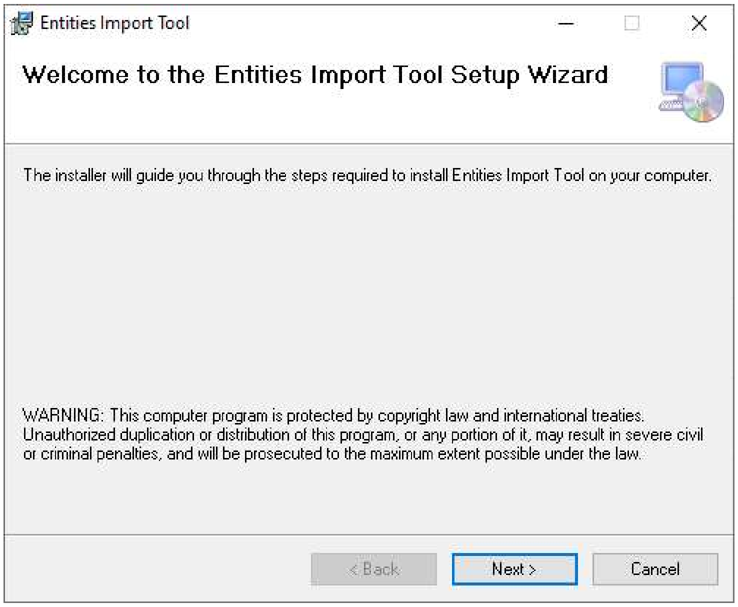
Following the steps below to install the tool:

1. Download the Entities Import Tool via left navigation.

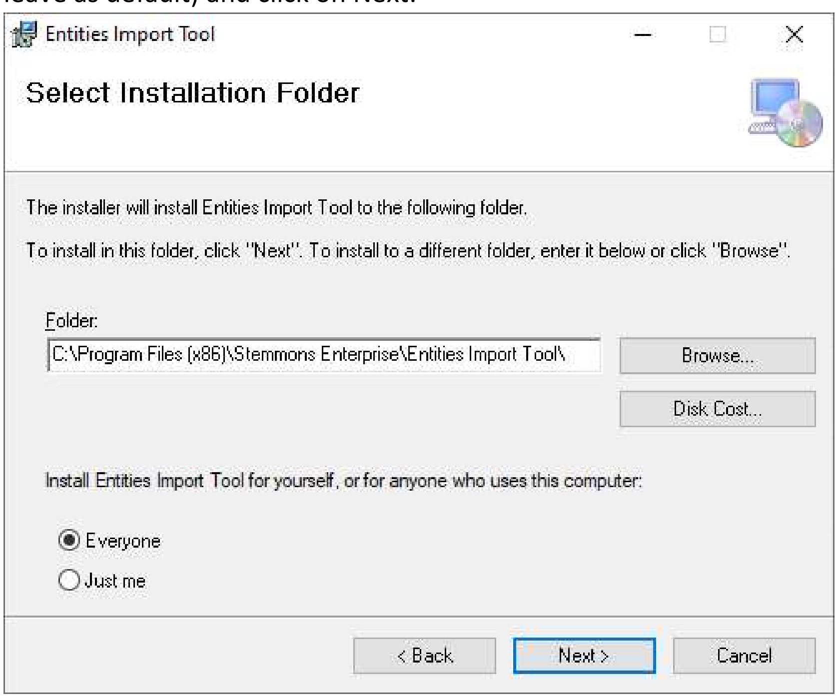


2. Find the EntitiesImportTool.msi file from the download folder.
3. Double click on the EntitiesImportTool.msi to install the tool.

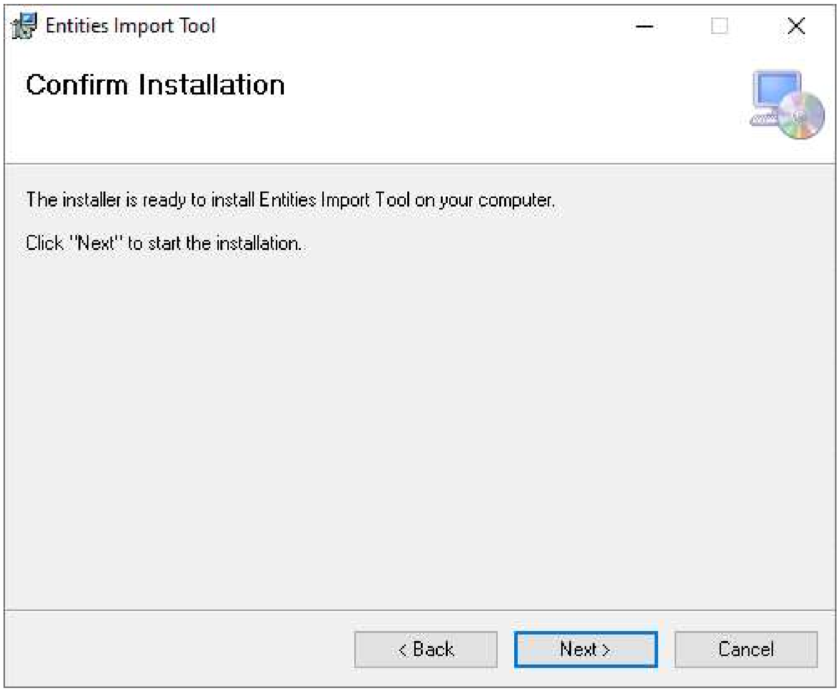
4. Run through the install set up to complete the installation. Note: The Import Tool requires local admin access to the desktop.
    a. Welcome to the Wizard screen:



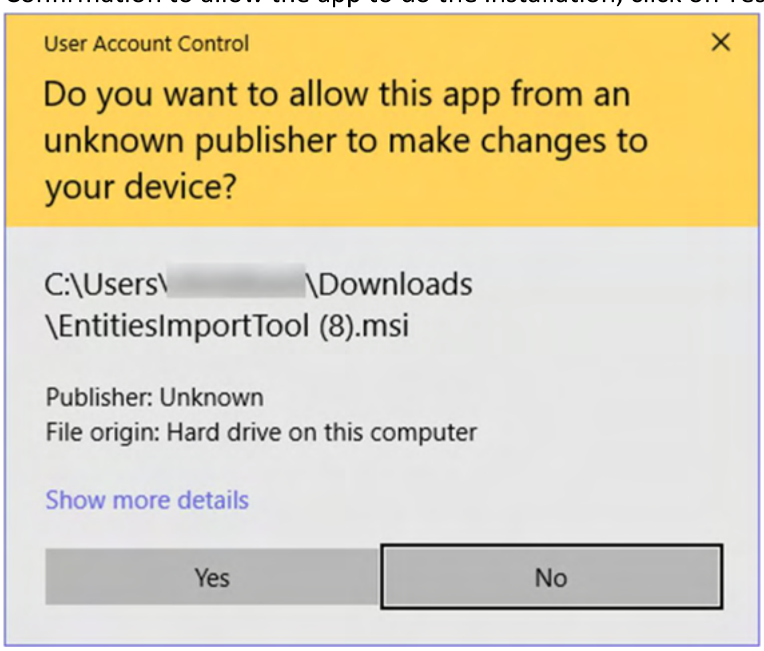
    Click on Next
    b. Select Installation Folder: choose appropriate folder where the tool should be installed (or leave as default) and click on Next:



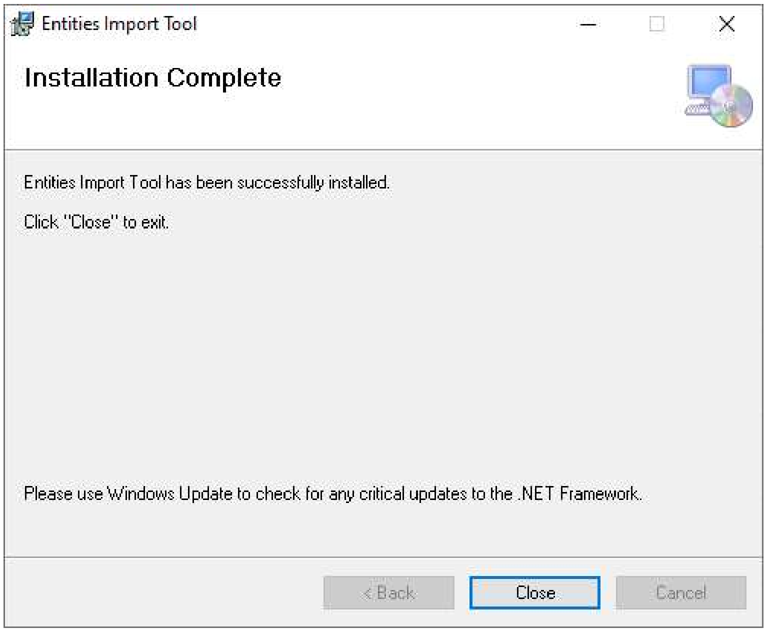
    c. Confirm Installation: click on Next.



d. Confirmation to allow the app to do the installation, click on Yes:



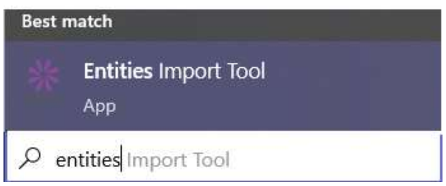
e. Installation in Progress and display Installation Complete once done, click on Close:



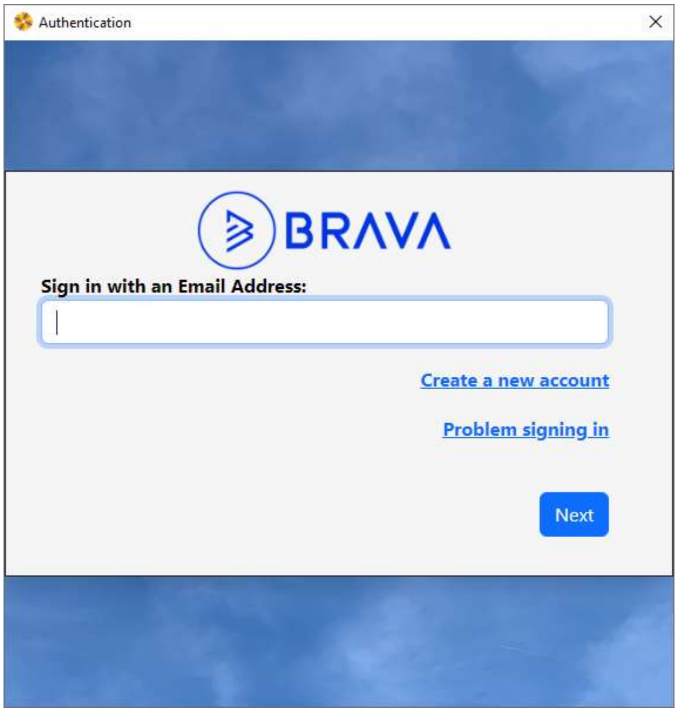
Steps to Import Entities Using Entities Import Tool

Follow the steps below to import mass entities into the system:

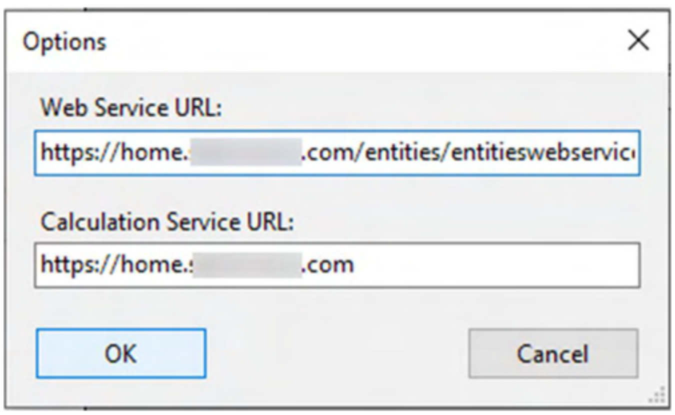
1. Open the Entities Import Tool by entering Entities Import Tool from the Windows Start Menu:



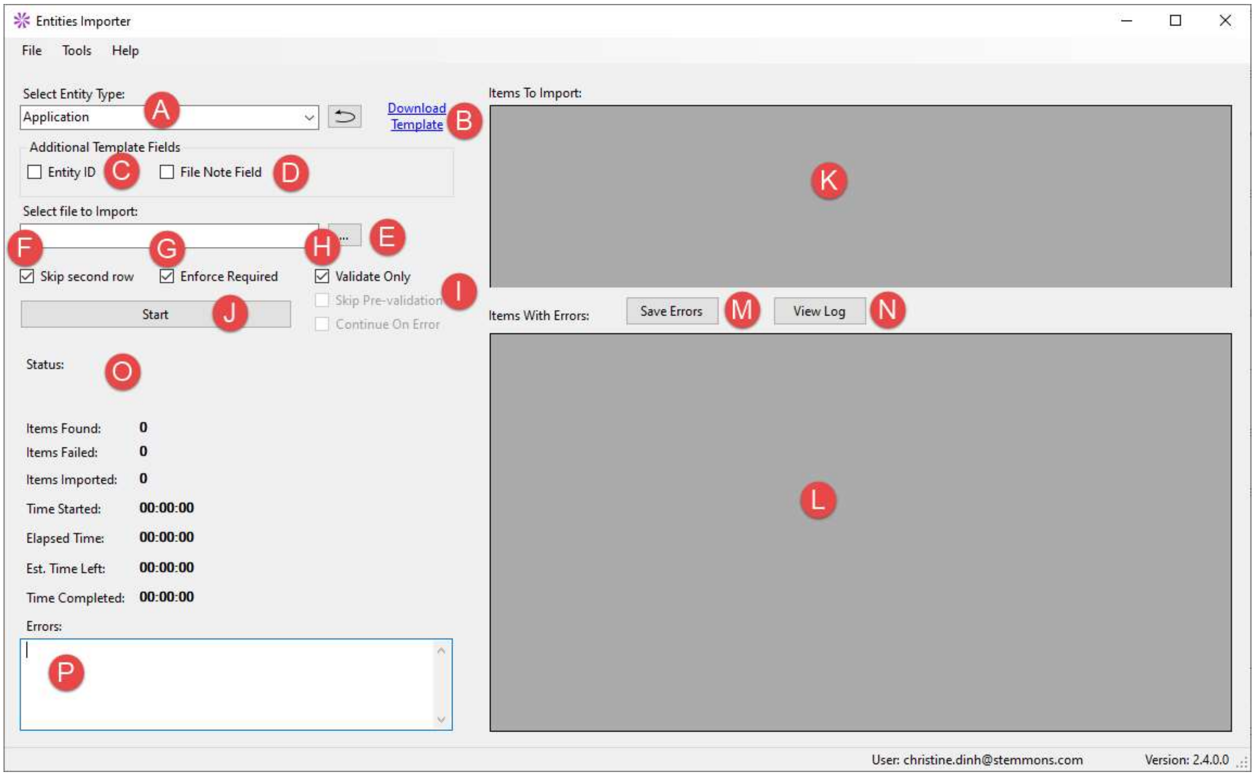
2. The application will launch an authentication page, login to the system as you normally do:



3. Once successful logged in, the Entities Import Tool will open and confirm on the instance URL:



Once confirmed, you will be directed to the Entities Import Tool. Below provides information about each of the options available:



a. Select an **Entity Type** to import.
b. Click on **Download Template** to download a template and fill out the data to be imported.
c. Click on **Entity ID** checkbox if you would like to update existing entities then click on Download Template. This option will provide the user with an Entity ID column to include in the import. If Entity ID is provided the system will update them with additional metadata or notes.
   Important note: Do not leave the other meta data column blank (unless you intentionally want to blank out the value for the field). If the column is left blank, the Entities Import Tool will blank out the value from the entity. If no update is needed in a metadata field, simply remove that column from the import file.
d. Click on File Note Field to include a Note field in the template. This note field will allow the user to enter a note for the imported entity. This option can be used for both newly created entity or entity updates. Once checked, click on Download Template to download the template with Note Field column.
e. Once the template is filled out with the list of entities to be newly created or updated. Click on … button next to field "Select file to Import" to upload the file.
f. In the template it provides the data type in the second row. Leave "**Skip second row**" checked (as default unless that row is removed from the template).
g. Check **"Enforce Required**" if you would like to Import Tool to validate against the Entity Type configurations and only allow entities with all required fields filled in to be imported.
h. Check "**Validate Only**" option to validate your import file for accuracy prior to importing.

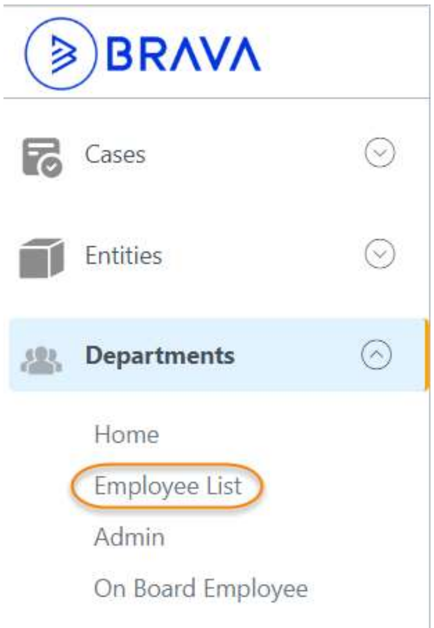
i. Once Validate is completed, uncheck this option to import the data. If you would like to skip the validation prior to importing the cases, check option "**Skip Pre-validation**". This option will be enabled once the Validate Only option is unchecked.
   Check option "**Continue On Error**" if you would like to import the valid entities and skip the ones in errors. If this option is not checked, the Import Tool will reject importing any entities until the entire import file's errors are corrected.
j. Click on **Start** to Start the import.
k. This area will display the list of entities to be imported.
l. This area will display the list of error entities.
m. Once the import is complete, the user can click on the Save Errors option. This option will save the errors into an error file and allow users to correct the errors and reimport.
n. View Log provides a log file for the import.
o. This area provides detailed progress about the import.
p. General errors will be provided in this section.

Departments Application

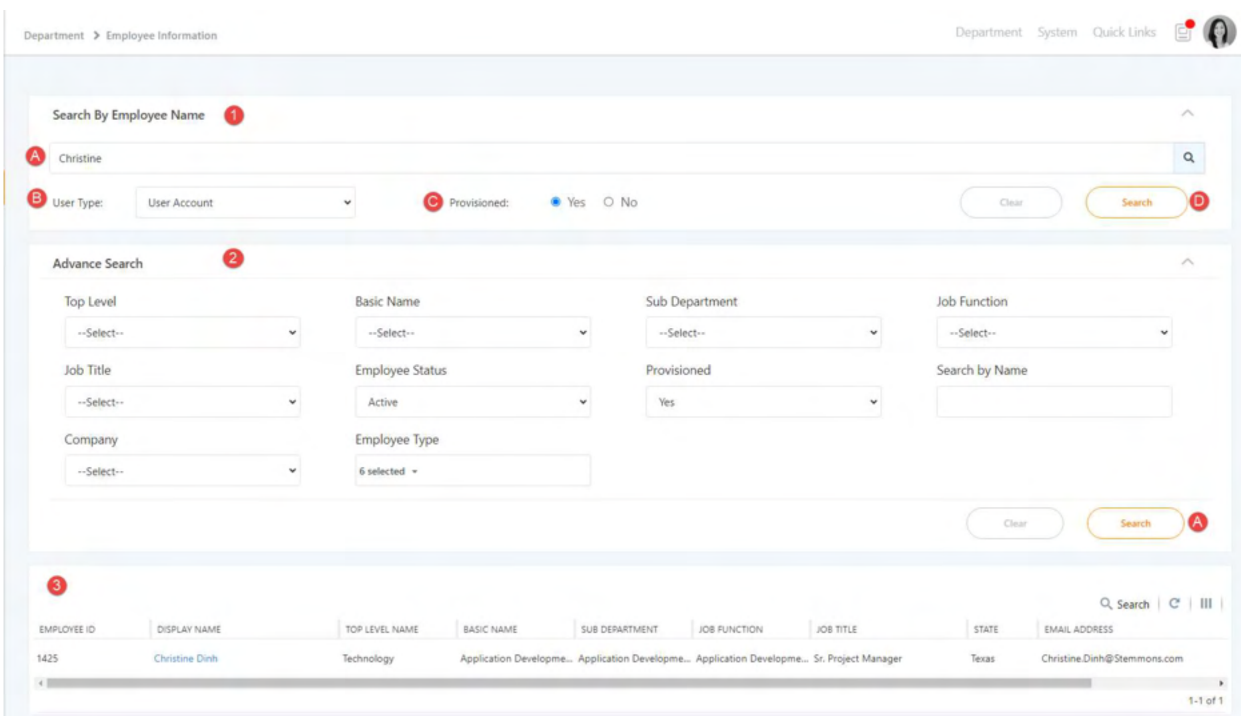
This guide provides instructions on provisioning employee and maintaining employee associations in Departments Application.

Employee Information

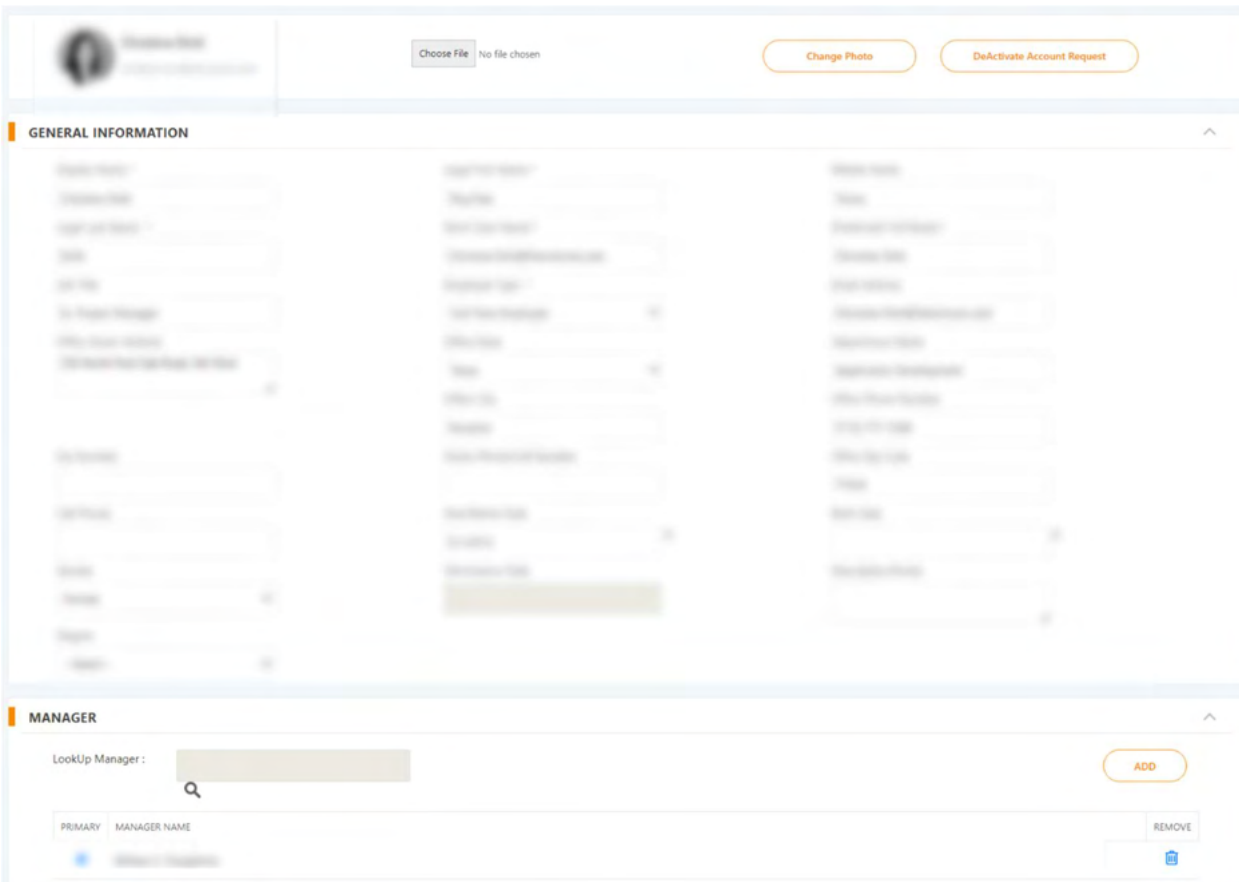
To access an employee record, from the main left navigation, select Departments → Employee List.



Employee Info Search Screen will open, provide the search criteria where appropriate:



1. Simple Search
    a. Enter an Employee Name
    b. User Type: select appropriate User Type
    c. Provision: check Yes if the employee already with a Job Title; otherwise select No.
    d. Click on Search
2. Advance Search: Select appropriate criteria such as Department Hierarchy, Employee Status, etc.
    a. Click on Search
3. Employee List: list of employees matched to the search criteria will be returned. Navigate to the Employee Information screen by clicking on employee's name on the grid.



The employee information screen provides information about the employee including his/her reporting manager and other detail associations.

Onboarding/Provisioning an Employee

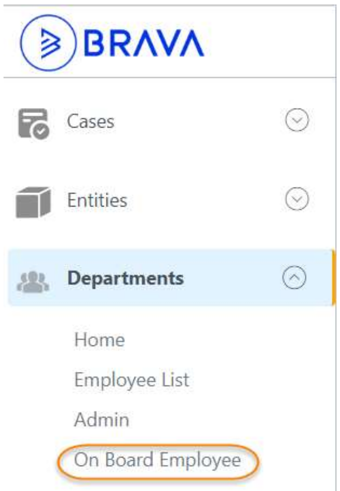
Active Directory Instance

If your organization is on Active Directory, the organization can choose Departments Application to on-board the user and maintain the user data via the system. Once the user is on-boarding in Departments Application, the system will automatically create a User AD account. This User Account will be the system of record for the user in the application.

Other option is to create the User Account in Active Directory and synchronize the user information into Departments Application.

Departments Application can be set up with 2-ways synchronization between AD and Departments or only 1-way synchronization from either way.

To onboard a User to the system, from the main left navigation, select Departments → On board Employee.



Non-AD Instance

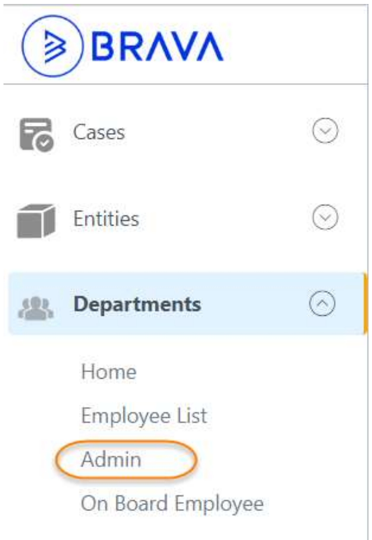
If your organization is a non-Active Directory instance, the User of the system will be maintained in Entities under User Entity Type. Once the administrator sets up the user accounts in the User Entity Type, the user/employee information will be synchronized into Departments Application. Currently with this setup, there will be only one way synchronization from User Entity Type to Departments Application. From Departments Application, the employee's association can be maintained there.

To onboard a User from non-AD instance, go to Entities → Origination Center → User Entity Type.

Administrative Functions

Administrative functions allow the admin user to set up the Departmental Hierarchy for the company and configure the associations related to the employees. _NOTE_: This option is available to the System Administrator only.

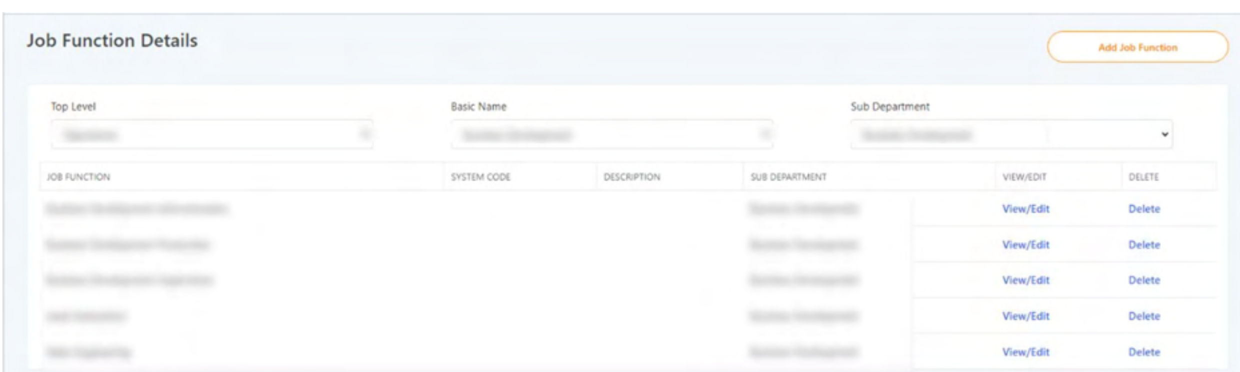
To access the Administration section of Departments Application, from the main left navigation, select Departments → Admin.



Once in the Admin page, different navigations will be available on top right menu:

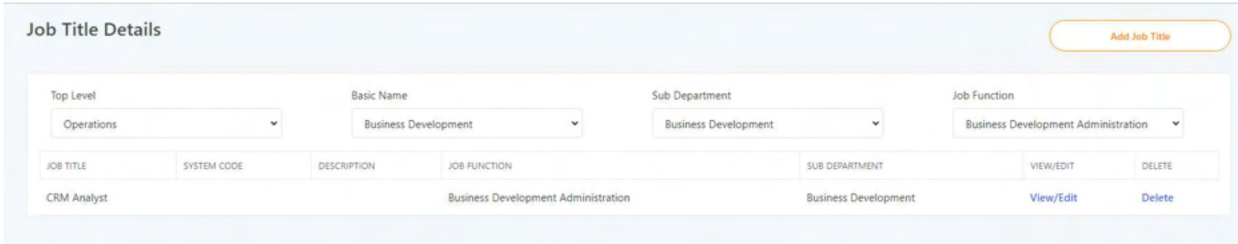
Job Function

The first three levels of the Department Hierarchy are set up in the System Config. To review/add Job Function, select Top Level, Basic Name, and Sub Department from the dropdown. The system will present a list of existing hierarchies. Option to View/Edit, Delete or Add new Job Function will be available in this screen:



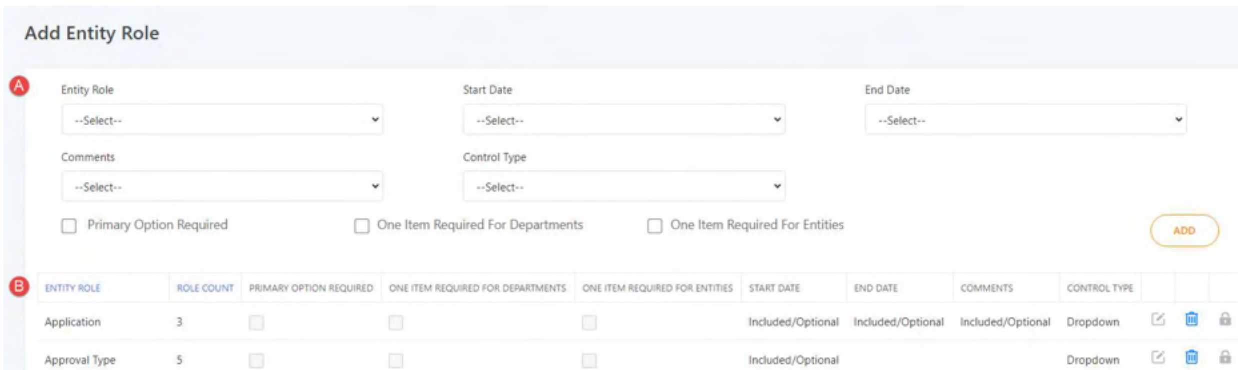
Job Title

Same as Job Function, this screen will allow Admin User to View/Edit, Delete, or Add a new Job Title:



Entity Role Association

Allows the Admin User to maintain the configurations for Entity Association.



a. This section allows setting up a new Entity Association to be associated with the employee. Select the Entity Role (Entity Role is entity items managed in Role Entity Type) and other available options and click on ADD.

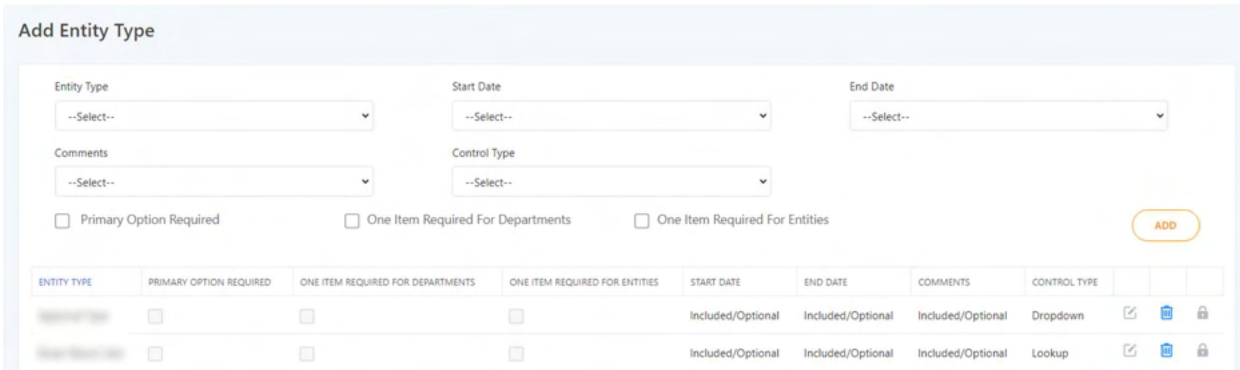
   Note:

   - *__Primary Option Required__*: when entity is associated to the Employee via Departments Application, one must be set as a primary entity associated to the employee. (For example, an employee can work in many locations, but a selected location must be a primary location).
   - *__One Item Required for Departments__*: when setting up the employee in Departments Application, this association must be provided to save the employee record.
   - *__One Item Required for Entities__*: when an Entity is being created in Entities Application, an Employee must be associated to the entity. For example, when creating a new property entity, an employee must be associated with the property to create the property entity.

b. This section provides a list of existing associations. Click on Edit (), Delete (), or Security () where appropriate.

Entity Type Association

Same as Entity Role Association, this option is to provide Admin User to maintain the configurations for Entity Type Association.

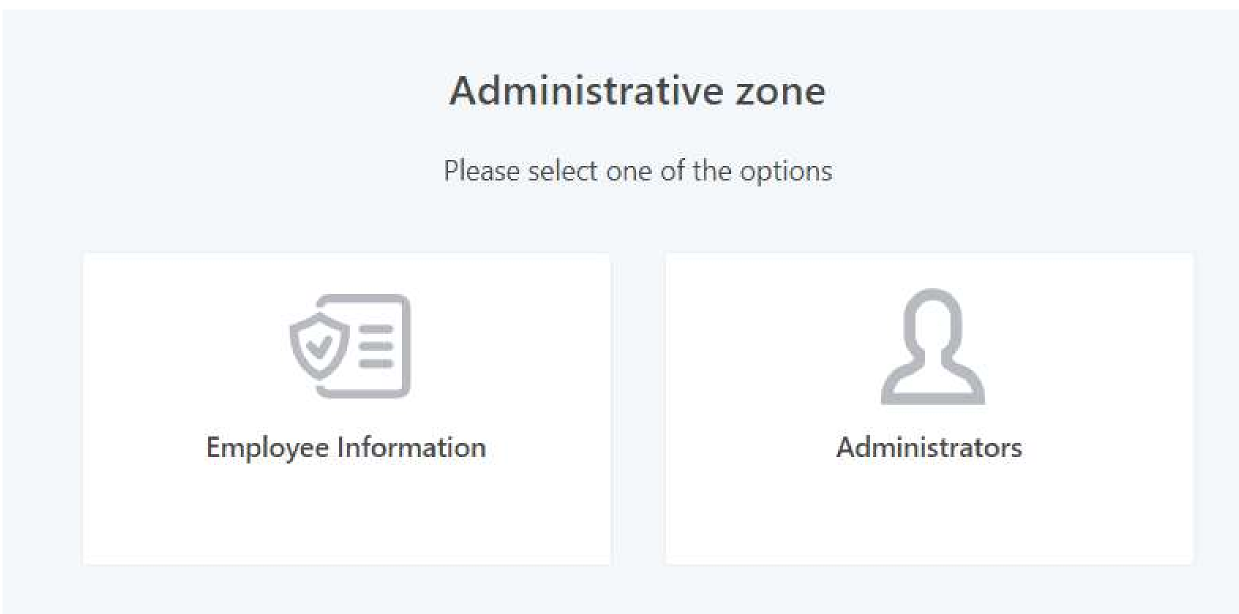


Departmental Hierarchy Import Tool

Departmental Hierarchy Import Tool allows the administrator to mass import the hierarchy.

Security

Grant permission to Departments Application.

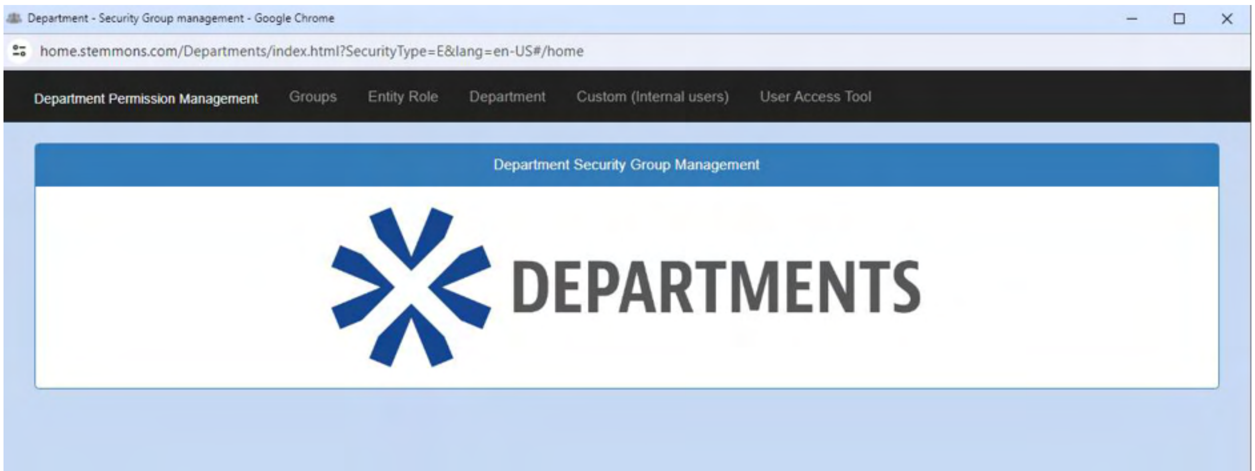


Employee Information

Employee Information can be secured if chosen. Once a security is added to the Employee Information, the system will block everyone from being able to see the Employee Information unless specifically granted. The same security model is being used in Departments as other applications which can be granted at the Group, Entity Role, Department Hierarchy, and Individual User.

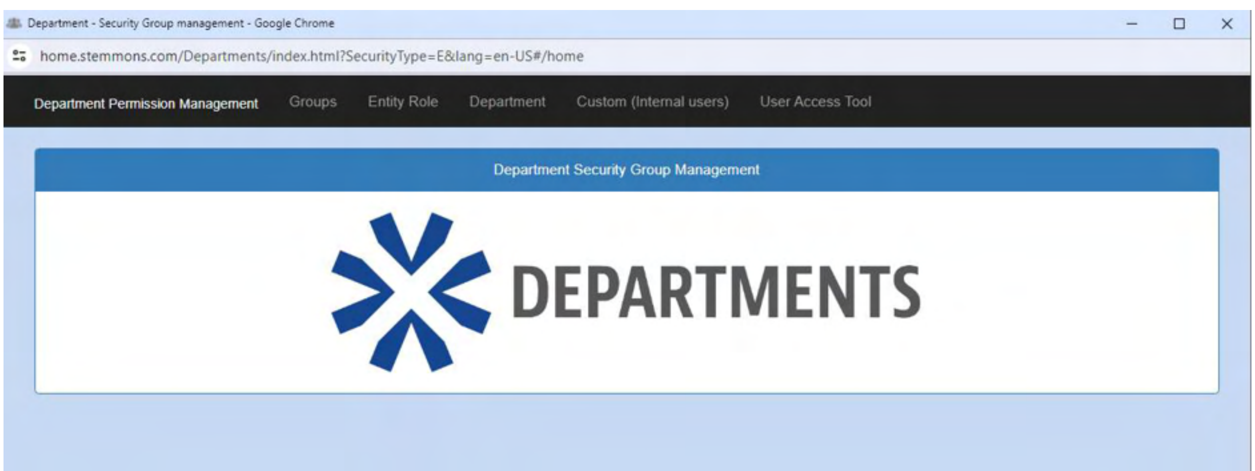
Security level:

1. C: Create/Onboard a new employee.
2. R: Read employee information.
3. U: Update employee information.
4. D: Deactivate/Offboard employee.



Administrators

This security controls who has access to the Administration functions within Standards. The same security model is being used as other Applications.



Facts Application

Facts contains a list of reports available in the system.

Quest Application

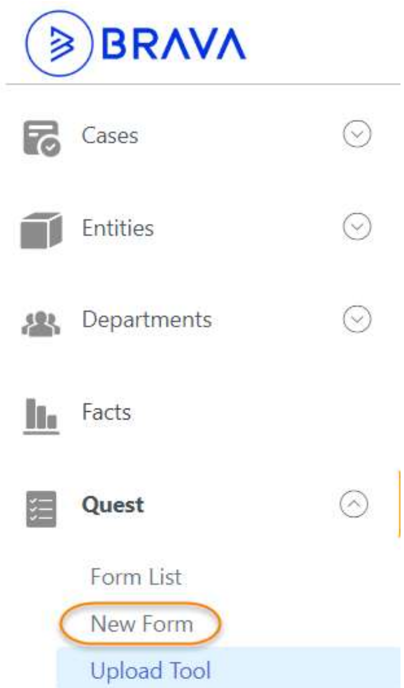
This guide provides instructions on how to create Quest Forms and work with Quest Form.

Creating a new Form

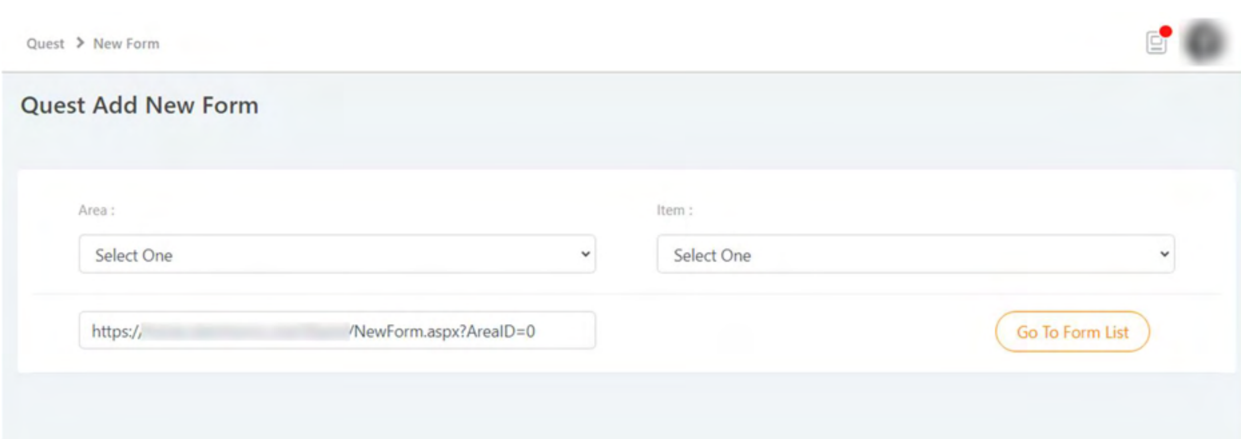
There are various ways to create a new Quest form, please see different options below:

From Quest Application

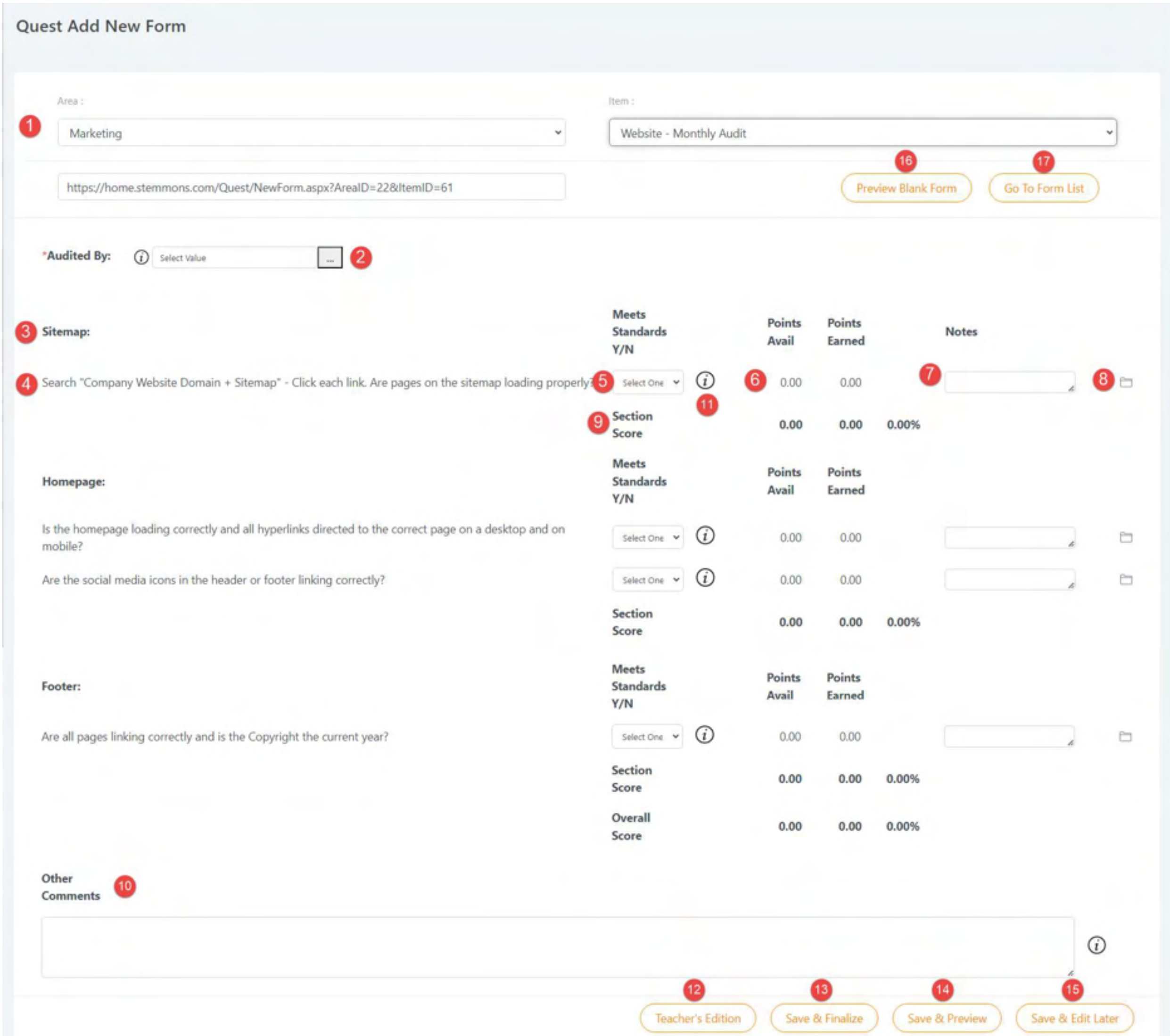
To create a new Quest form from Quest Application, from the main left navigation, select Quest → New Form.



From the new form page, select the Area and Item that you would like to create the form from.



Once an Area and Item is selected, the system will present you with a new form to fill out:



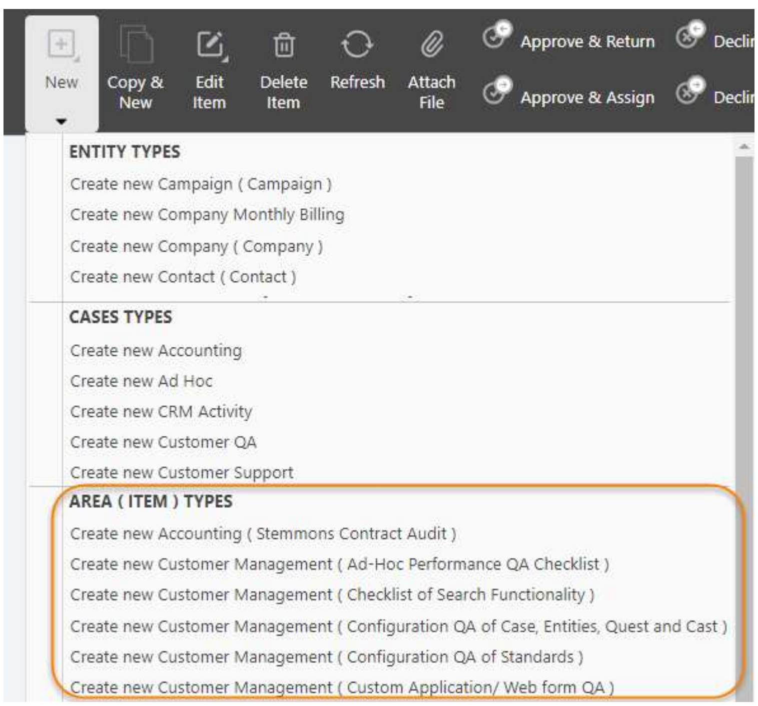
1. Select Area & Item
2. Info field section: required field(s) indicated with *
3. Category/Grouping Name
4. Individual Questions, categorized within the Category
5. Provide Answer to the Question
6. Each Answer can be given with a Point Available and Point Earned (this set up allows scoring and this scoring can be used to determine the effectiveness of a process and/or to kick off a case when an action is required to be taken).
7. Notes can be provided. If a case is generated from this question, the note entered here will be carried out to the Case Notes.
8. Attachment to support the question. If a case is generated from this question, the attachment will be done to the Case Notes.
9. Section Score: Total scores for the entire Category.
10. Other Comments: Notes for the entire form.

11. (i) Information: clicking on this icon will take user to a Teacher's Edition of the individual question. It provides information on how the form was configured if the case is generated based on a question's answer and who the case will be assigned to.
12. Teacher's Edition: Same as #11, this Teacher's Edition will provide information about how the form was configured if the case should be generated based on the score of the entire form and who the case will be assigned to.
13. Save & Finalize: complete the form. Note: once finalized, the form will be locked and no longer allow editing.
14. Save & Preview: save the form and preview the list of cases once the form is finalized.
15. Save & Edit Later: save the form. This form remains open for editing later.
16. Preview Blank Form: provides a preview of an unfilled form.
17. Go To Form List: takes user to the Form List page.

From Entities

When the Quest form has a field that is referenced to an Entity via External Datasource field, from the view entity page, there is an option allowing user to create the Quest form directly. For example, filling out an Accounting Contract Audit checklist for a Company/Customer where Company is an Entity.

From an Entity View page, from top ribbons, select New → Area (Item) Types → Create new [Quest Form]:



Once a form is chosen, the system will take you to the new form with the selected Entity already populated.

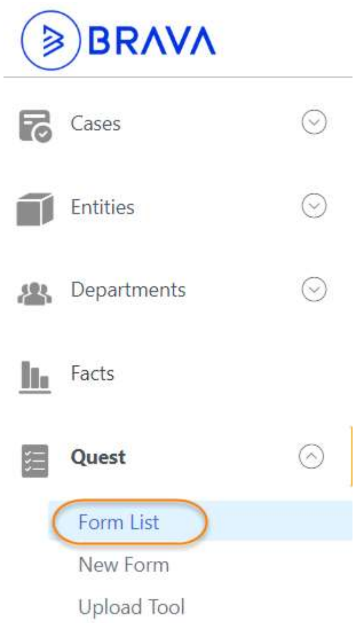
From Quest Import Tool

Users can upload multiple Quest forms via the Quest Import Tool. Follow HERE for instructions on downloading/installing and use of the Import Tool.

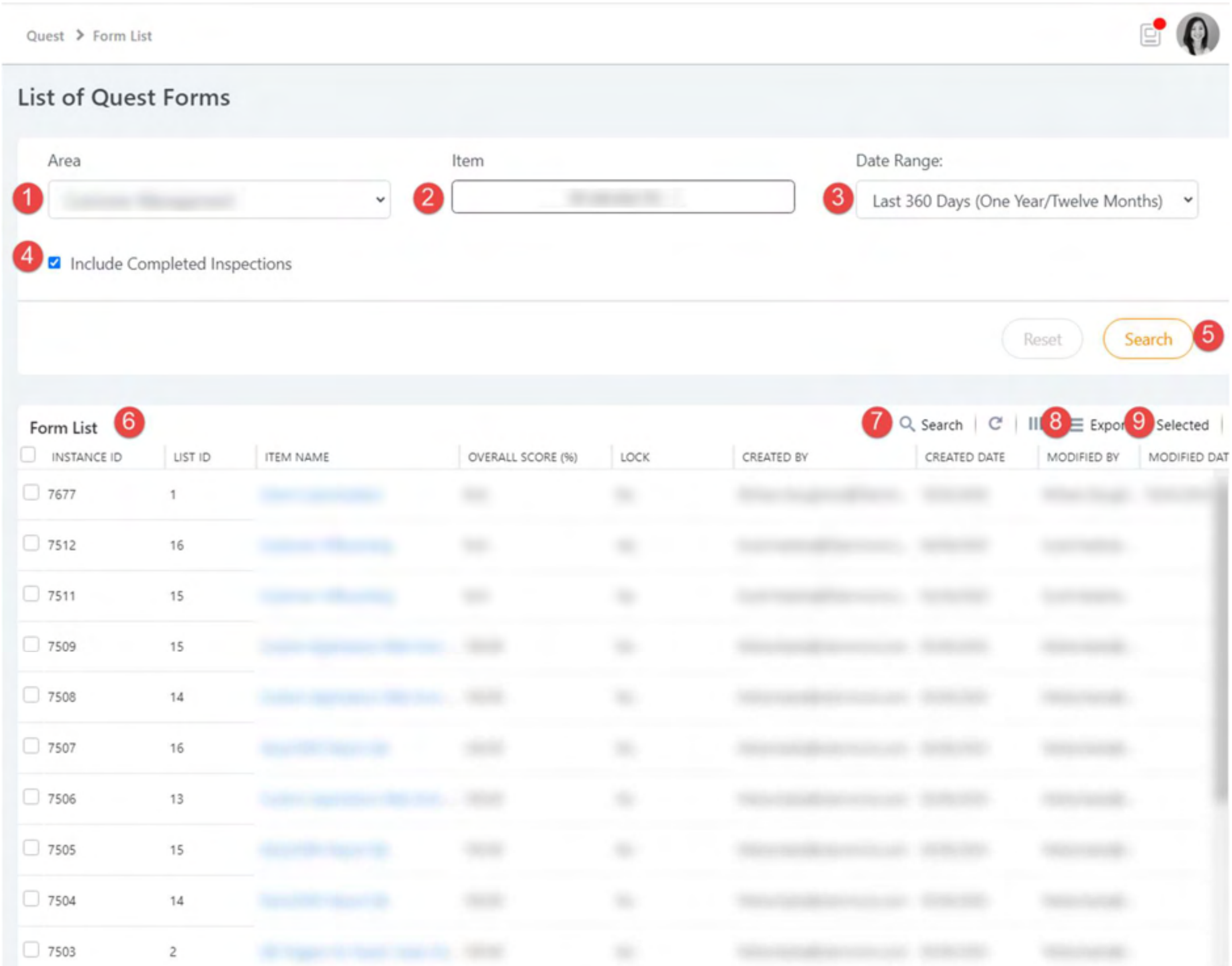
Form List

Form List provides a list of created forms.

To access the Form Lit, from the main left navigation, select Quest → Form List.



Once in Form List, select the options as indicated below:



1. Select an Area
2. Select an Item
3. Select a Date Range of when the form was created
4. Include Completed Inspections: checked if you would like list of both completed and open forms
5. Click on Search
6. Form List: system returns list of forms resulting from the selected criteria 1-4
7. Search: allow filter options within the Form List.
8. Export: options to export the list to Excel and PDF.
9. Selected:
    a. Lock Item(s): check the form(s) to lock. Once locked, the form is finalized.
    b. Unlock Item(s): check the lock form(s) to unlock, this will allow the user to edit and make changes to the form. NOTE: only users with special permission to allow unlocking the forms. Reach out to the system administrator to request access as needed.
    c. Delete Item(s): check the form(s) to delete.

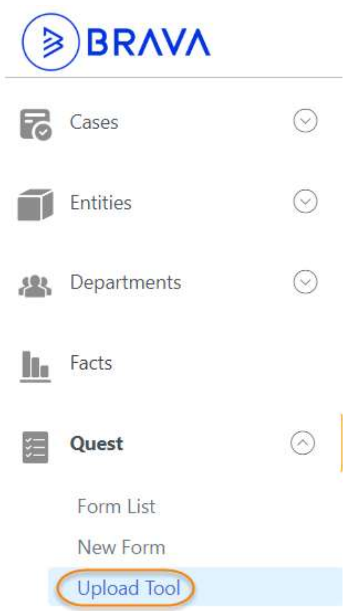
Quest Import Tool

Users can download a copy of the Quest Import Tool by navigating to Quest → Upload Tool from the main left navigation.

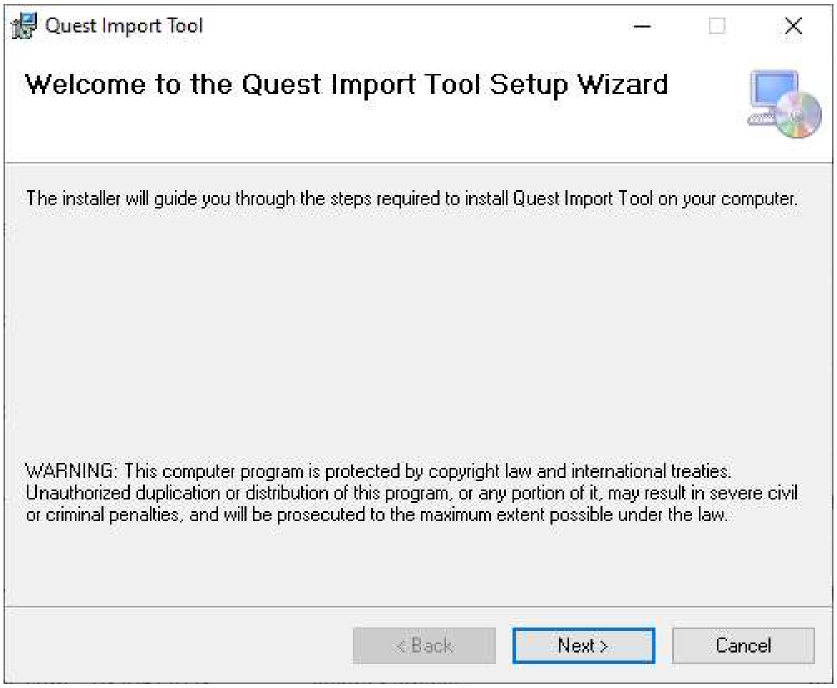
Steps to Install the Quest Import Tool

Following the steps below to install the tool:

1. Download the Entities Import Tool via left navigation.

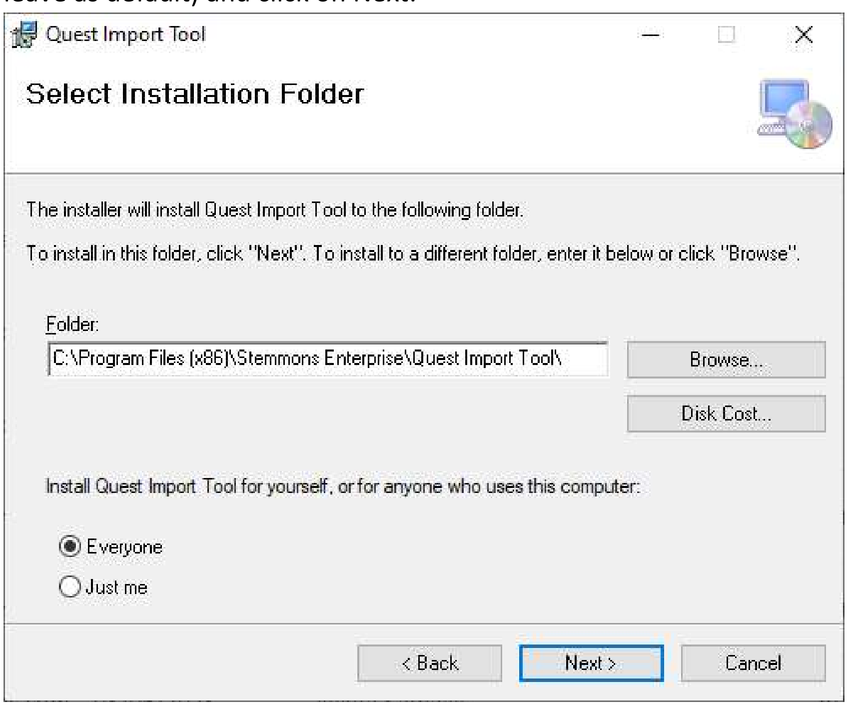


2. Find the QuestImportTool.msi file from the download folder.
3. Double click on the EntitiesImportTool.msi to install the tool.
4. Run through the install set up to complete the installation. Note: The Import Tool requires local admin access to the desktop.
    f. Welcome to the Wizard screen:

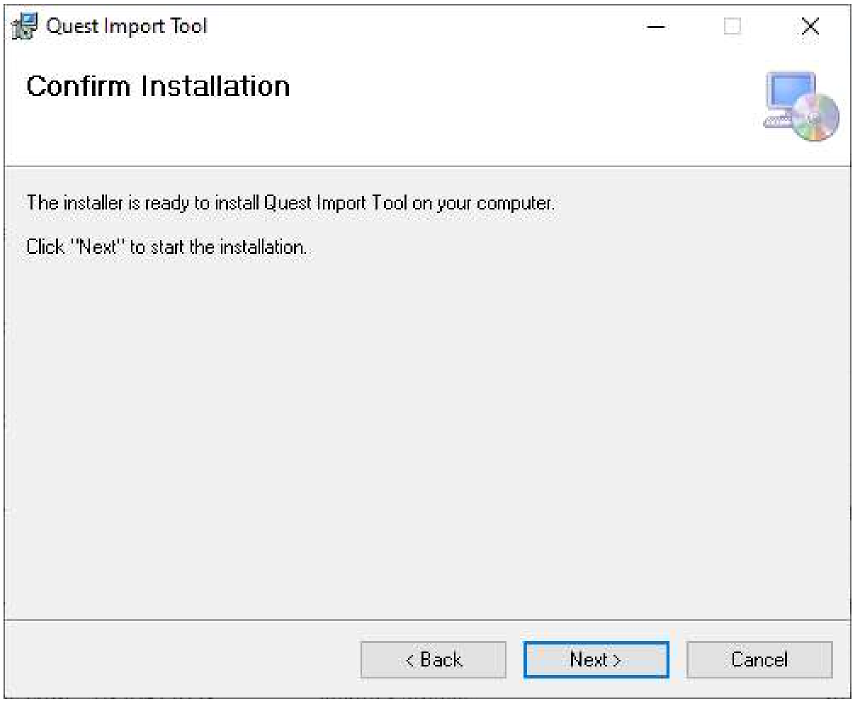


Click on Next

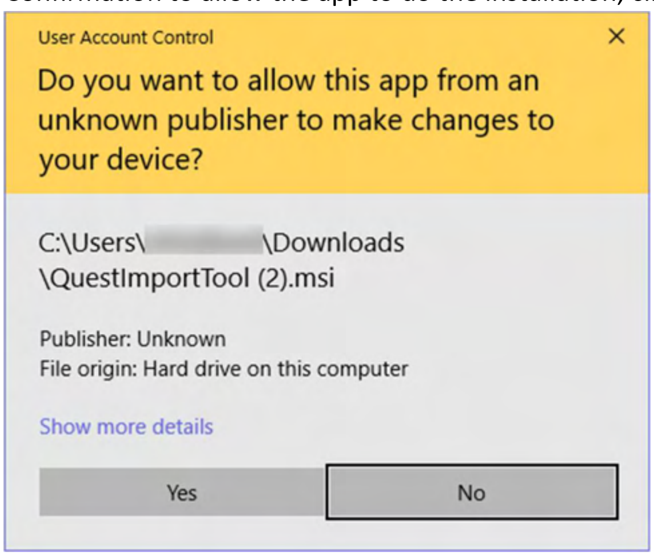
g. Select Installation Folder: choose appropriate folder where the tool should be installed (or leave as default) and click on Next:



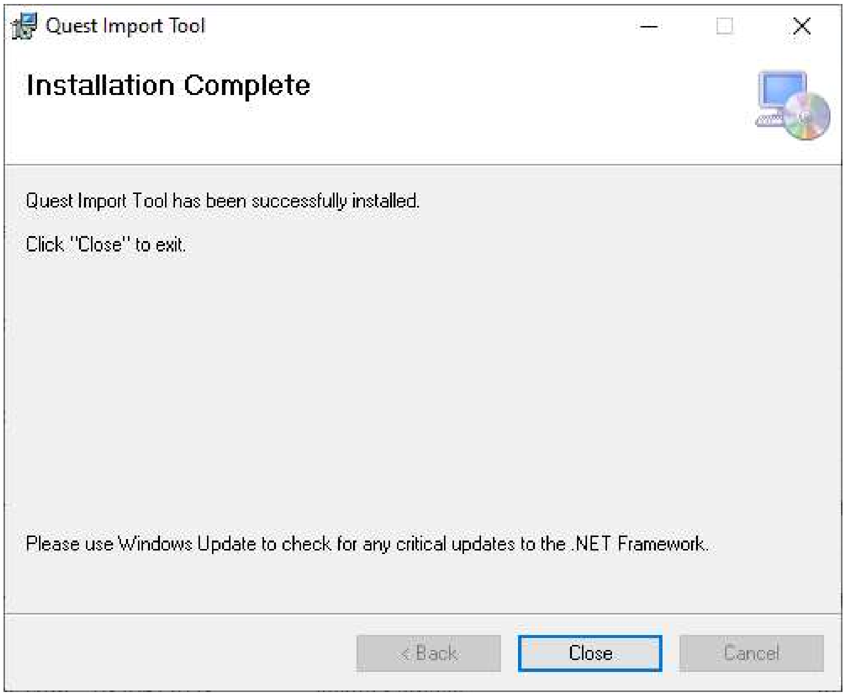
h. Confirm Installation: click on Next.



i. Confirmation to allow the app to do the installation, click on Yes:



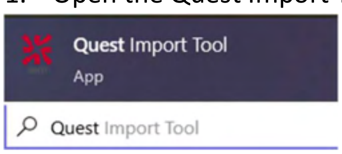
j. Installation in Progress and display Installation Complete once done, click on Close:



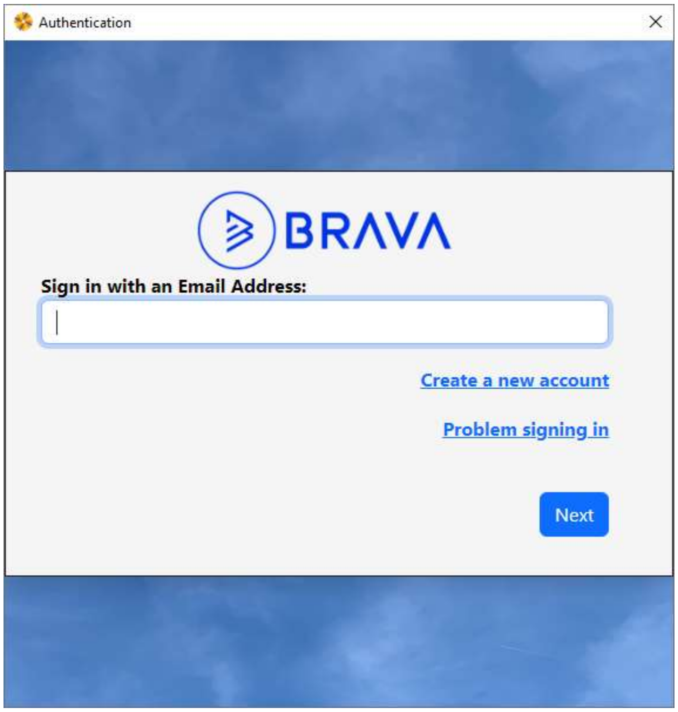
Steps to Import Quest Forms Using Quest Import Tool

Follow the steps below to import mass Quest forms into the system:

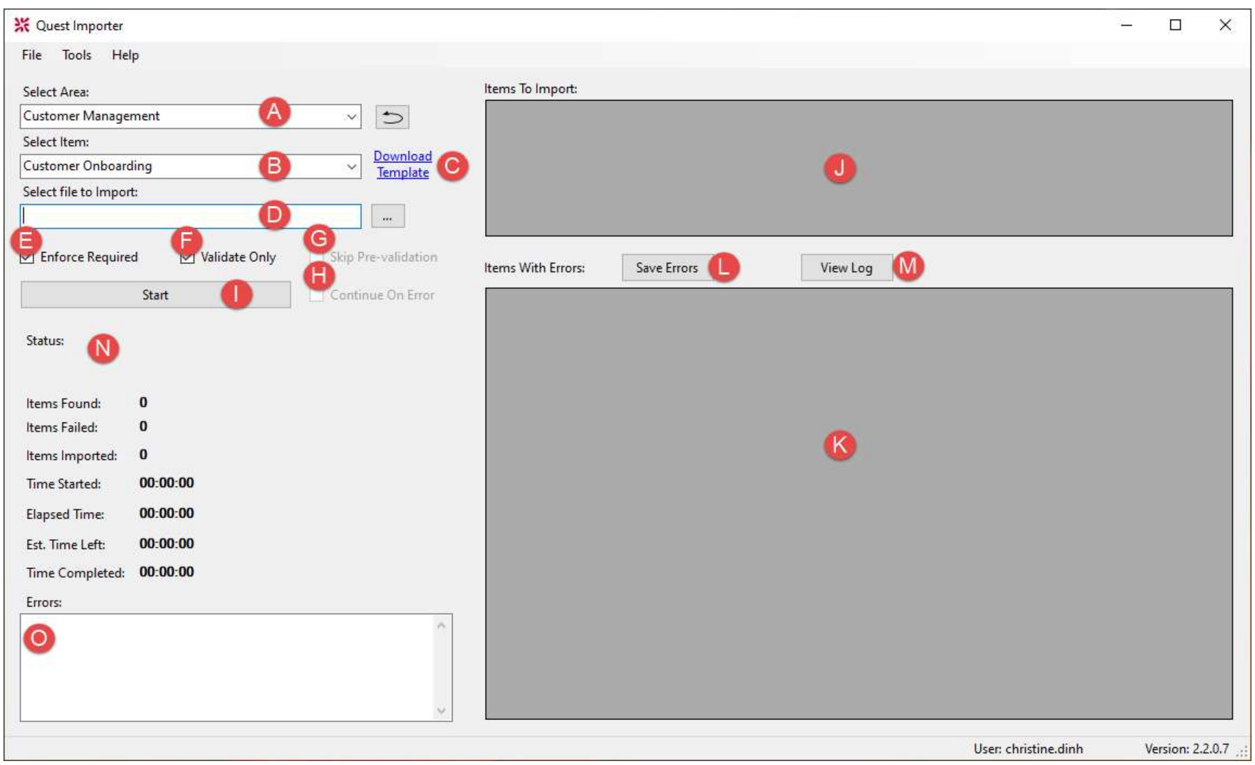
1. Open the Quest Import Tool by entering Quest Import Tool from the Windows Start Menu:



2. The application will launch an authentication page, login to the system as you normally do:



3. Once successfully logged in, the Cases Import Tool will open. Below provides information about each of the options available:



c. Select an **Area**.

d. Select Item.

e. Click on **Download Template** to download a template and fill out the data to be imported.
f. Once the template is filled out with the list of Quest forms to be imported, click on … button next to field "Select file to Import" to upload the file.
g. Check **"Enforce Required**" if you would like to Import Tool to validate against the Case Type configurations and only allow cases with all required field filled in to be imported.
h. Check "**Validate Only**" option to validate your import file for accuracy prior to importing.
i. Once Validate is completed, uncheck this option to import the data. If you would like to skip the validation prior to importing the cases, check option "**Skip Pre-validation**". This option will be enabled once the Validate Only option is unchecked.
j. Check option "**Continue on Error**" if you would like to import the valid forms and skip the ones in errors. If this option is unchecked, the Import Tool will not import any forms until the entire import file's errors are corrected.
k. Click on **Start** to Start the import.
l. This area will display the list of Quest forms to be imported.
m. This area will display the list of forms in error.
n. Once the import is complete, the user can click on the Save Errors option. This option will save the errors into an error file and allow users to correct the errors and reimport.
o. View Log provides a log file for the import.
p. This area provides detailed progress about the import.
q. General errors will be provided in this section.

Once the import is complete, the user can verify the imported forms by going to the Form List.

Standards Application

Standards provide procedures, processes, and guidelines within your organization.

Standards can be accessed from the main left navigation → Standards.

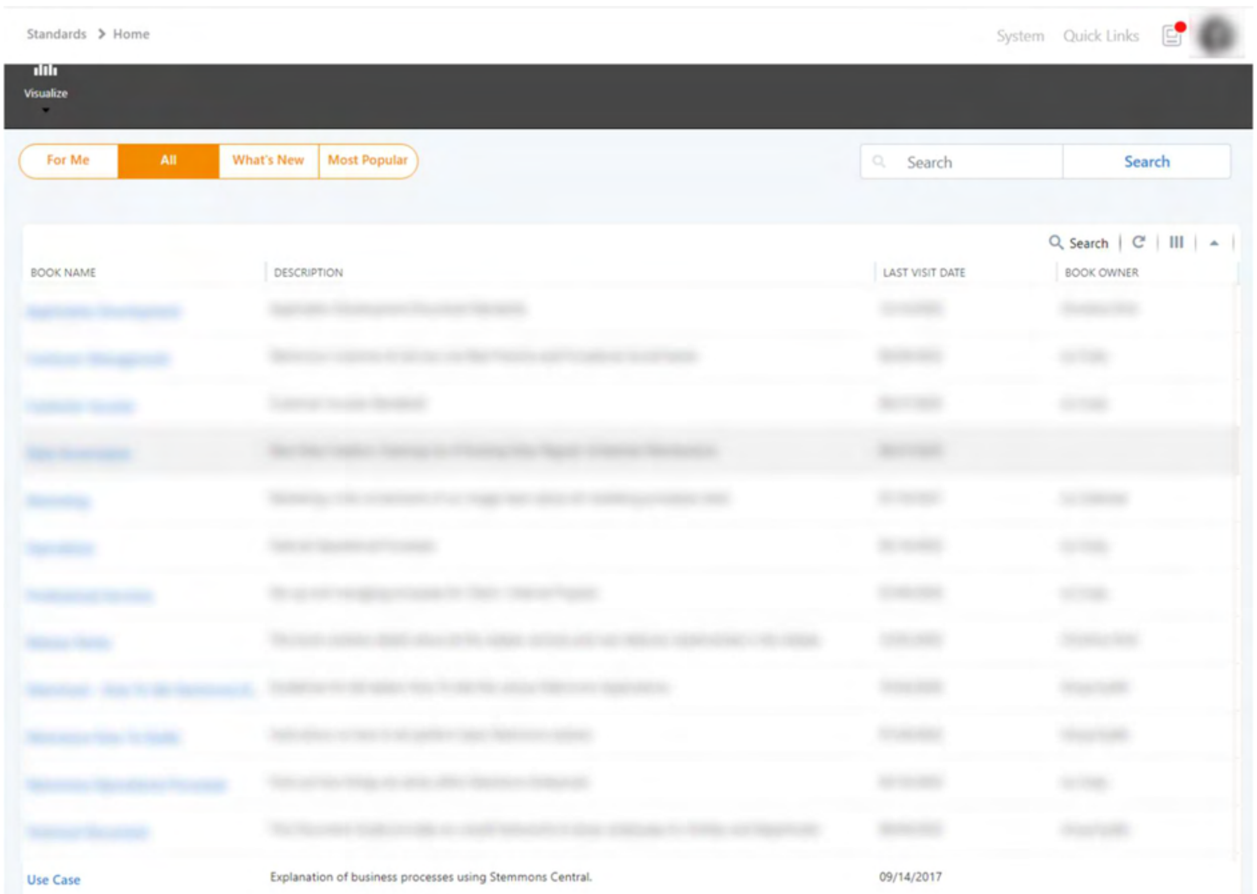
Within Standards Application, there are 4 different sections: For Me, All, What's New, and Most Popular.

For Me

This section lists standards that are relevant to you or your department.

All

This section lists all available books within the organization.



What's New

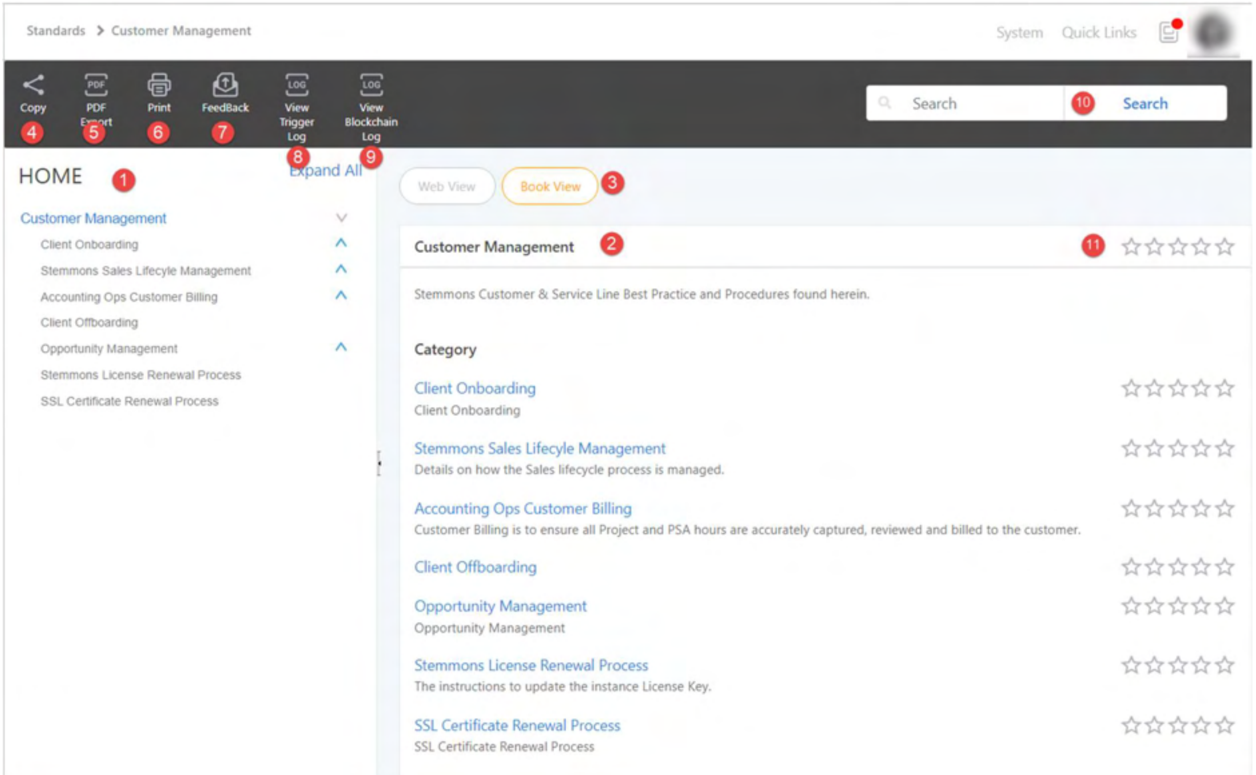
This section lists new topics added to Standards within the past 30 days.

Most Popular

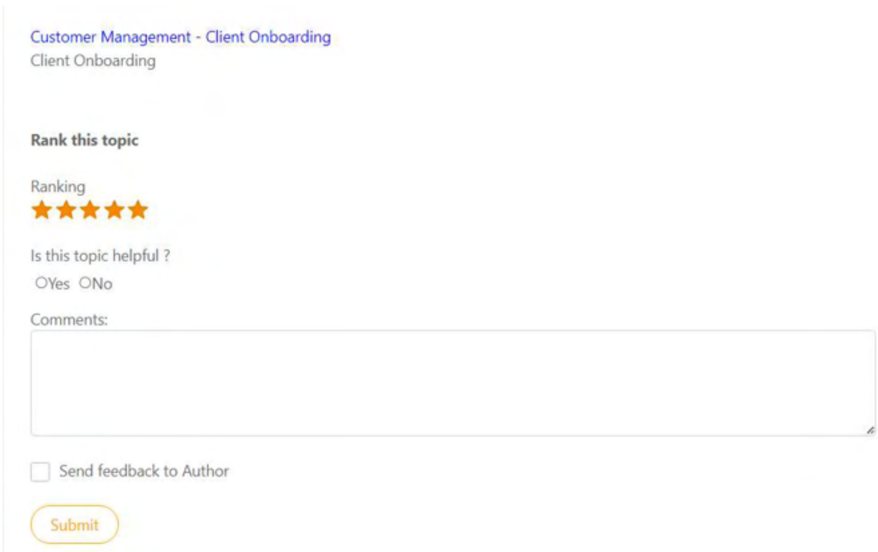
This section lists topics that are visited the most frequently.

Navigate within Standards Book

After selecting a book from any of the options above, the user will be presented with a Book in Web view.



1. **Left tree view navigation**: This tree navigation presents the topics in a tree view relationship. Each tree level presents a topic that can be expanded to the child/sub-topics. Once a tree node is selected, detail pane (2) will be presented with the content for the selected topic.
2. **Detail pane**: This pane provides the detailed contents. If the lowest level of the book is selected, this area will present the contents of the topic; otherwise, it will list different child/sub-topics as hyperlinks. Users can select a sub-topic to review its content by clicking on the hyperlink.
3. **Book View**: Presents detailed contents on the book expanded for all topics/sub-topics. This option allows users to read through the book contents on one page and export it to a PDF.
4. **Ribbon button: Copy**: copies the URL of a selected topic for sharing purposes.
5. **Ribbon button: PDF Export**: exports the selected topic to PDF.
6. **Ribbon button: Print**: prints the topic.
7. **Ribbon Button: Feedback**: provides feedback to the author.
8. **View Trigger Log**: not available
9. **View Blockchain Log**: not available
10. **Search**: enters a keyword or phrase to search within the Standards contents.
11. **Provide Feedback**: once click on the stars next to the topic, the system will direct users to a feedback screen:

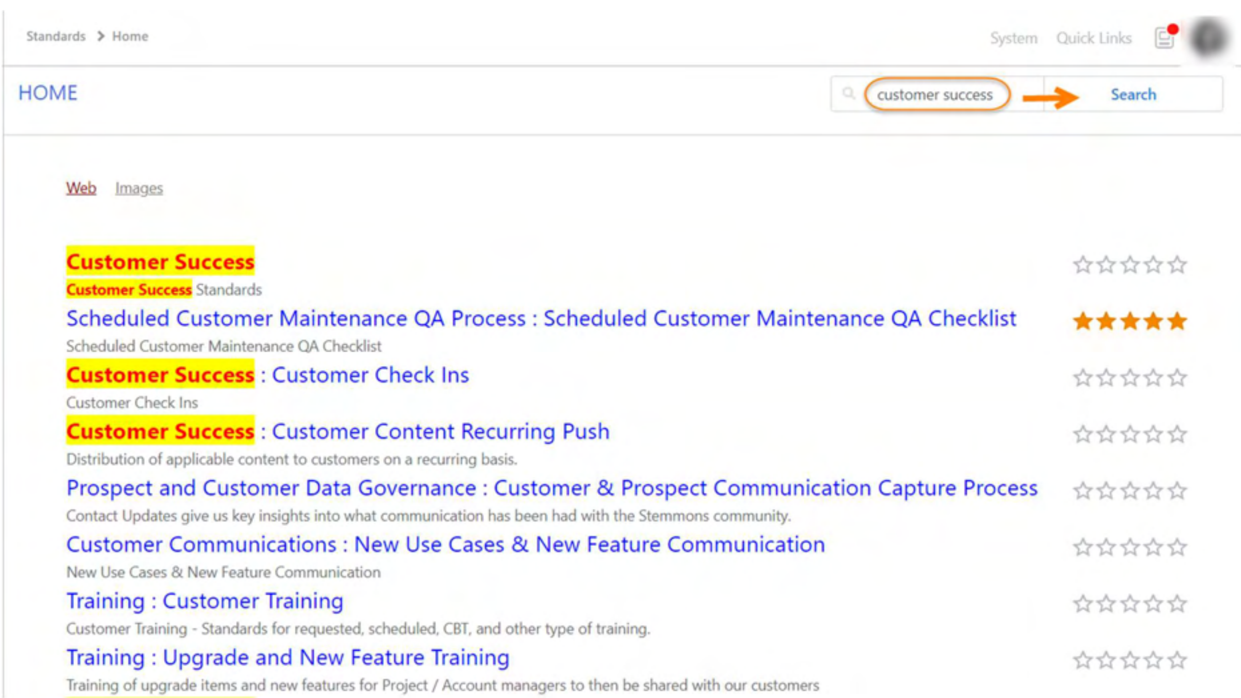


If the user would like to send feedback to the author (via a case), select "Is this topic helpful?," enter Comments, check "Send feedback to Author" and click on Submit.

Note: if "Send feedback to Author" is unchecked, the case will not be created; however, the ranking will still be submitted.

Search

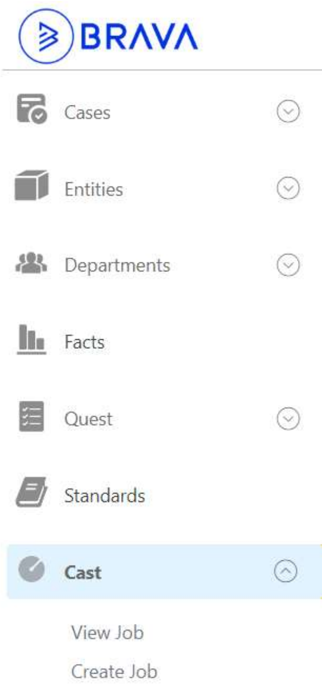
Search within Standards works like Google Search. It allows users to search for information within Standards by entering keywords or phrases.



Cast Application

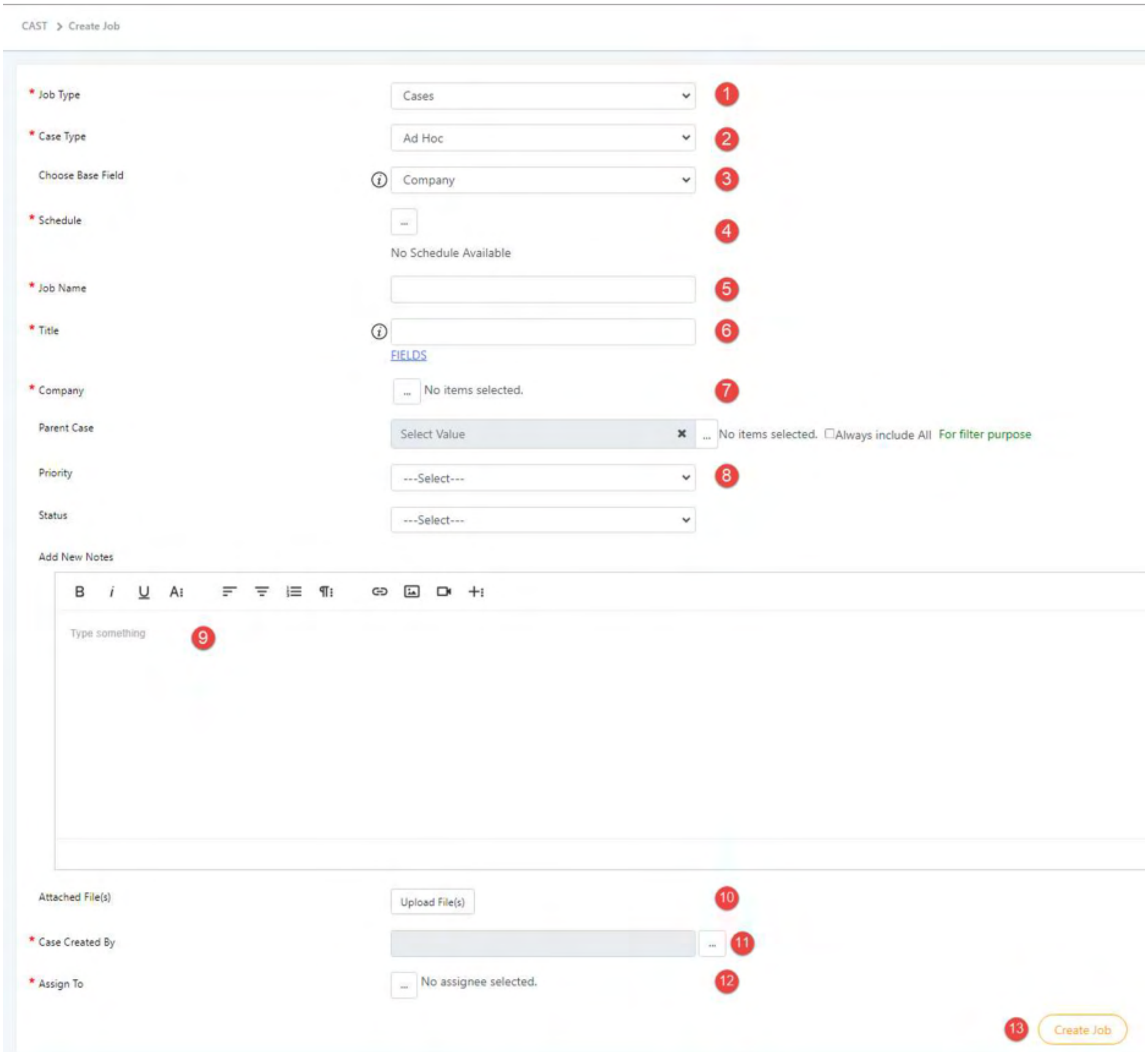
This guide provides instructions on how to create Cast Jobs to kickoff Cases via a scheduler.

To access Cast, select Cast from the main left navigation.



Create a new Cast job

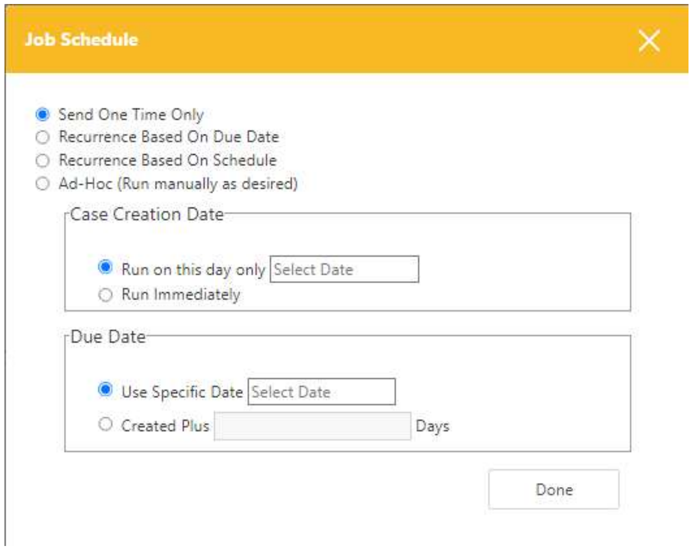
To create a new job, select Create Job. “Create Job” page will be displayed. Required fields are displayed with red asterisk next to field labels.



1. Select Job Type = Cases
2. Select a Case Type. The page will refresh with all detailed fields relevant to the Case Type.
3. Choose Base Field: If the case configuration contains more than one External Data Sources, the Choose Base Field will display. This field will be used as a basis to generate cases. It will contain a list of all External Data source fields available in the selected Case Type. A case will be created for every item selected from the Base Field and assigned to each user specified in the Assigned To option. Once a Base Field is selected, you can select which data records the job should create a case for.
4. Schedule:

   Click on to create schedule. The system will open a new dialog box to Schedule the Cast (one time or recurring). Select the appropriate option and complete the form.

- **Send One Time Only:** This is a one-time job.

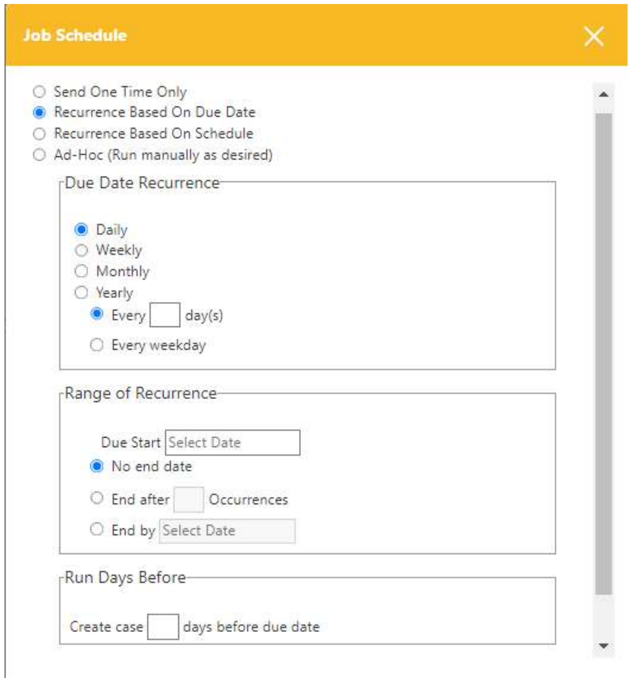


  - **Case Creation Date:** enter a date when the job should run or select Run Immediately.

  In Due Date, there are two options:

  - **Use Specific Date:** a specific due date.
  - **Created Plus X Days:** provides number of days the case is due upon creation. Example: if the user selected 1/15/2023 as the start date for the job and the due date of “*Created Plus 2 days” then* the due date of the case would be 1/17/2023.

- **Recurrence Based on Due Date:** allows to schedule a recurring job based on due date.

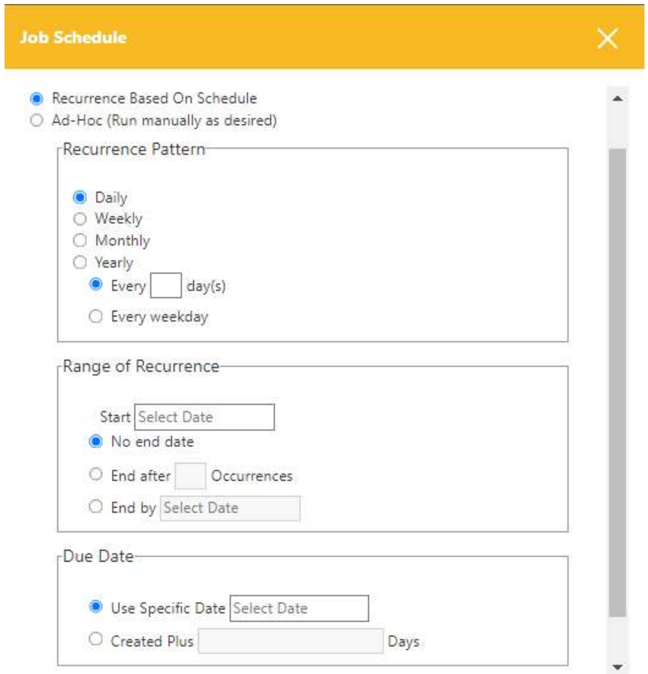


Configuration options:

1. **Due Date Recurrence:** selects how often the job should run: Daily, Weekly, Monthly, or Yearly. If Daily is selected, the user would also have an option to run every x number of days or every weekday.
2. **Range of Recurrence:** select the Start Date and End Date options.
3. **Run Days Before:** provides the # of days before the Due Date the case should be created.

For example, under Due Date Recurrence, the user selects run Daily and run Every 4 days with the start date of 2/1/2024 and create case 2 days before due date. With this configuration, the first job will run on 2/3/2024 and cases created under this job will have the due date of 2/5/2024I j.

- **Recurrence Based on Schedule:** allows to schedule a recurring job based on schedule.

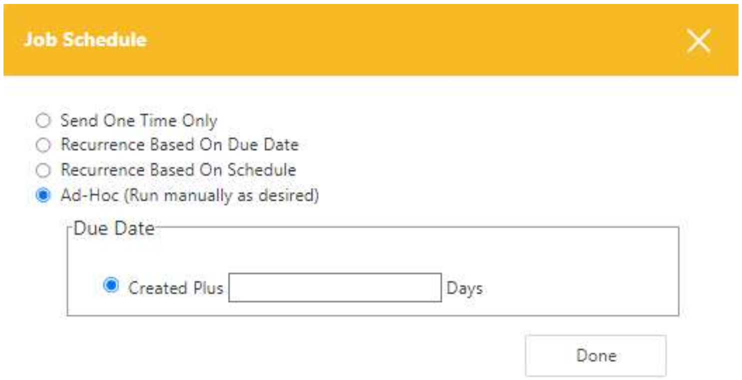


Configuration options:

1. **Recurrence Pattern:** selects how often the job should run: Daily, Weekly, Monthly, or Yearly. If Daily is selected, the user would also have an option to run every x number of days or every weekday.
2. **Range of Recurrence:** enters Start Date and End Date of the job.
   - **No end date:** there is no end date.
   - **End after X Occurrences:** number of run occurrences before job ends.
   - **End by Date:** enters a specific date when the job should end
3. **Due Date:** There are two Due Date options:
   - **Use Specific Date:** choose a specific Due Date.
   - **Created Plus X Days:** provide a # of days from the Creation Date as the Due Date of the cases generated from the job.
     Example: if the user selected 2/1/2023 as the start date for the job and the due date of *Created Plus 2 days* the due date would be 2/3/2023.

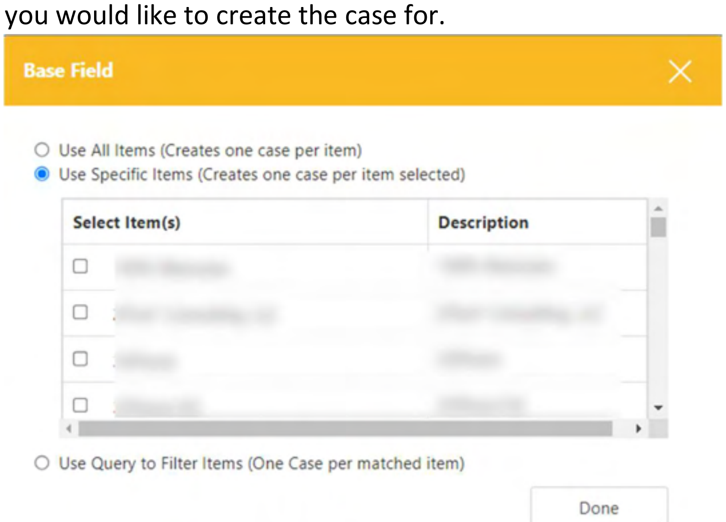
Note: Changing the Schedule in an existing job will create similar, new jobs and deactivate the current job.

o **Ad-Hoc (Run manually as desired)**: this option allows the job to be created and run on ad hoc basis and can be rerun as needed.

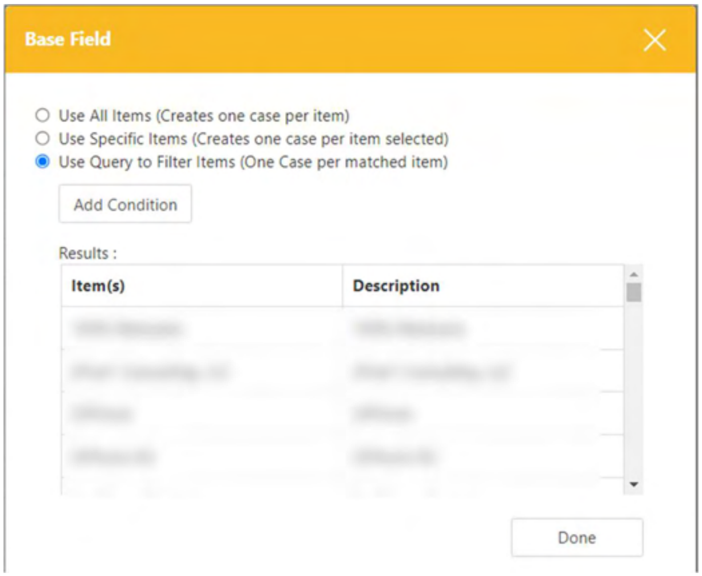


- **Due Date:** Allows you to provide the number of days to add to the Case Created Date as Due Date of the cases generated from the job.

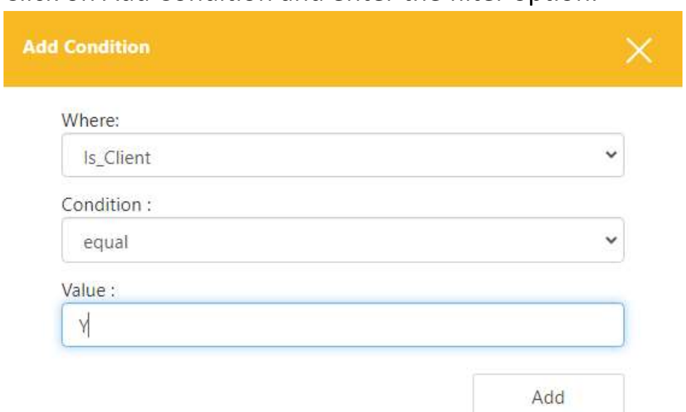
5. Job Name: Enter a unique Job Name.
6. Title: Enter a Case Title. Click on FIELDS and select the Field(s) to be populated in the Case Title.
7. [Base Field]: once a selected Base Field is chosen, this Base Field will be populated here to allow users to filter which items to create the case for. Below are the filter options:
    a. Use All Items (Create one case per item).
    b. Use Specific Items (Create one case per item selected).
    The system will provide available items/records in the Base Fields. Check the items that you would like to create the case for.



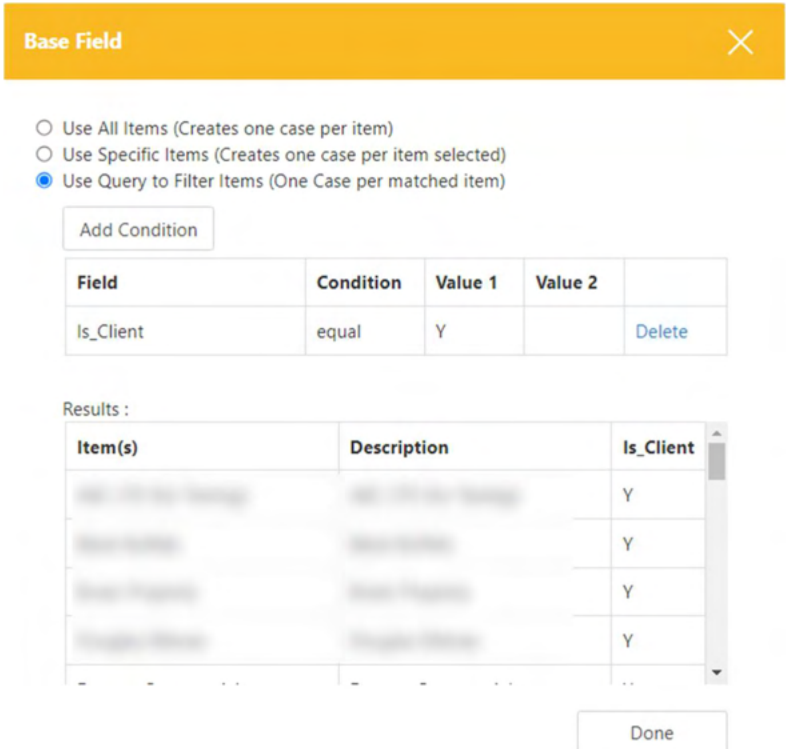
    c. Use Query to Filter Items (One Case per matched item)



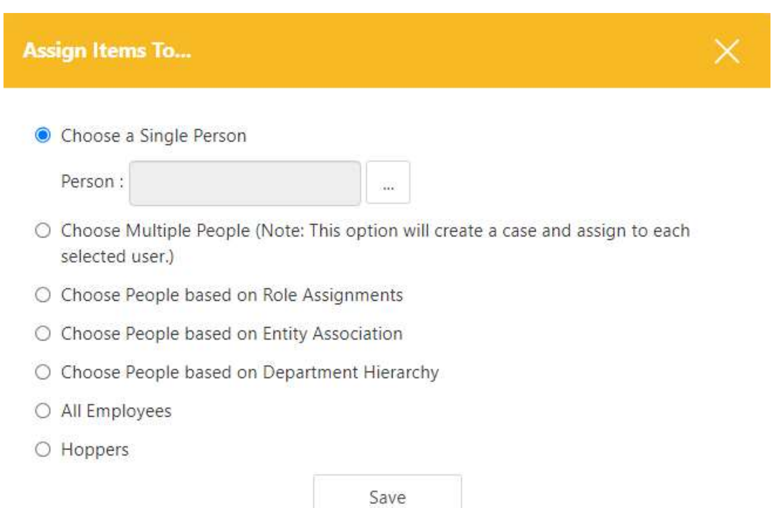
Click on Add Condition and enter the filter option.



Once a filter is added, the system returns a list of items matched with the filter criteria. You can add additional filters by clicking on Add Condition. NOTE: multiple conditions will be treated as an AND option.



8. Enter other case meta data fields.
9. Notes: enter Notes to be populated in the case.
10. Attached Files: Uploads file(s) to the case.
11. Case Created By: select a user to be populated as the case creator.
12. Assign To: Below are the different options on who the cases should be assigned to:



- **Choose a Single Person:** If you want to assign the cases to a single person then select this option. Click on the box to search for and select a person. Once selected click *Done*.
- **Select Multiple People:** This option will create a case and assign it to all users selected in the list. Click on Add New and the user can see a new dialog box called Search Items. To Choose Person, type the name and click on Search. Once the user selects one or more people, click on Done.
- **Choose People based on Role Assignments:** To choose people based on Role Assignments click on this option. Click on Add New. The user can see a new dialog box called Choose Items and it contains the following fields.
    - **Entity Type: s**elect the Entity Type from the drop-down menu that has the association configured. For example, Select Company.
    - **Role:** User can select Role from the drop-down menu, for example select Customer Satisfaction Manager.
    - **Items:** The user has two options.
        - **All Items:** The user can select choose all items and click on Done
        - **Specific Items:** The user can select Specific Items and can click on Select ALL or other required options.

o **Choose People based on Entity Association:** The user can select an Entity Type that has employees associated with the entity type. If this option is chosen, all employees who associated to the selected Entity via Entity Type association will receive a case.

- **All Items:** The user can select choose all items and click on Done
- **Specific Items:** The user can select Specific Items and can click on Select ALL or other required options.

- **Choose People based on Department Hierarchy:** To choose people based on Department Hierarchy click on this option. Click on Add New. The user can see a new dialog box called Department Hierarchy and it contains the following fields.
    - **Top Level:** Select the Top level from the drop-down menu. Top level is the required field.
    - **Basic Name:** Select the Basic Name (optional)
    - **Sub Department:** Select the Sub-Department (optional)
    - **Job Function:** Select the Job Function (optional)
    - **Job Title:** Select a Job Title (optional)

  <u>*NOTE*</u>: the employees/users associated with in the last selected level of hierarchy will receive a case.

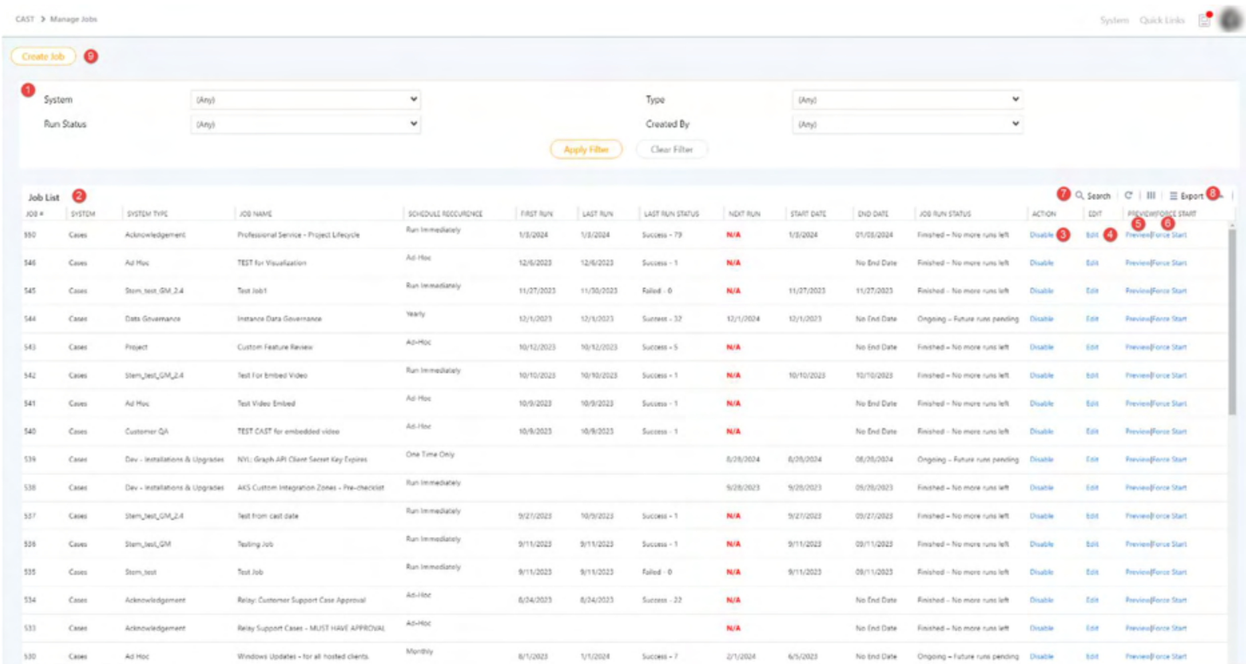
- **All Employees:**
    - The user can use All Employees option to assign the job to all the employees in a company.
    - The user also can filter on which employees should receive the case based on Condition (Note that these filter data fields come from the employee configuration in Departments Application). Multiple filter conditions can be added, and the system will treat the condition as an AND condition.
- **Hopper**
    - **Assign to Default Hopper:** The user can use this option to assign the case to the case type default Hopper which is set in Cases Application.

- **Assign to Specific Hopper:** The user can use this option to assign the case to the specific Hopper from the list of hoppers by selecting the radio buttons.

View Job

View Job provides a list of available jobs. There are 4 filter options: System, Type, Run Status, and Created By. When first loading, the Job List will be provided with all active Jobs and allow filtering as needed.

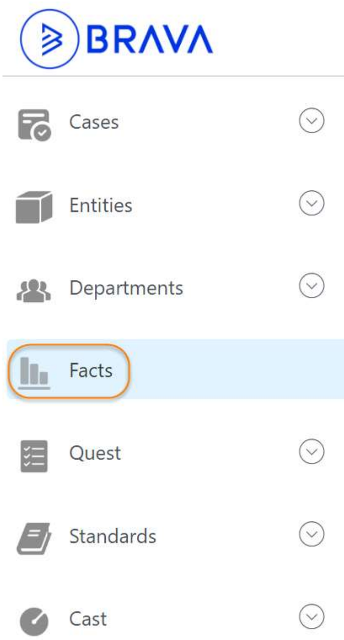
Options to filter/search for a job is also available in the Job List grid:



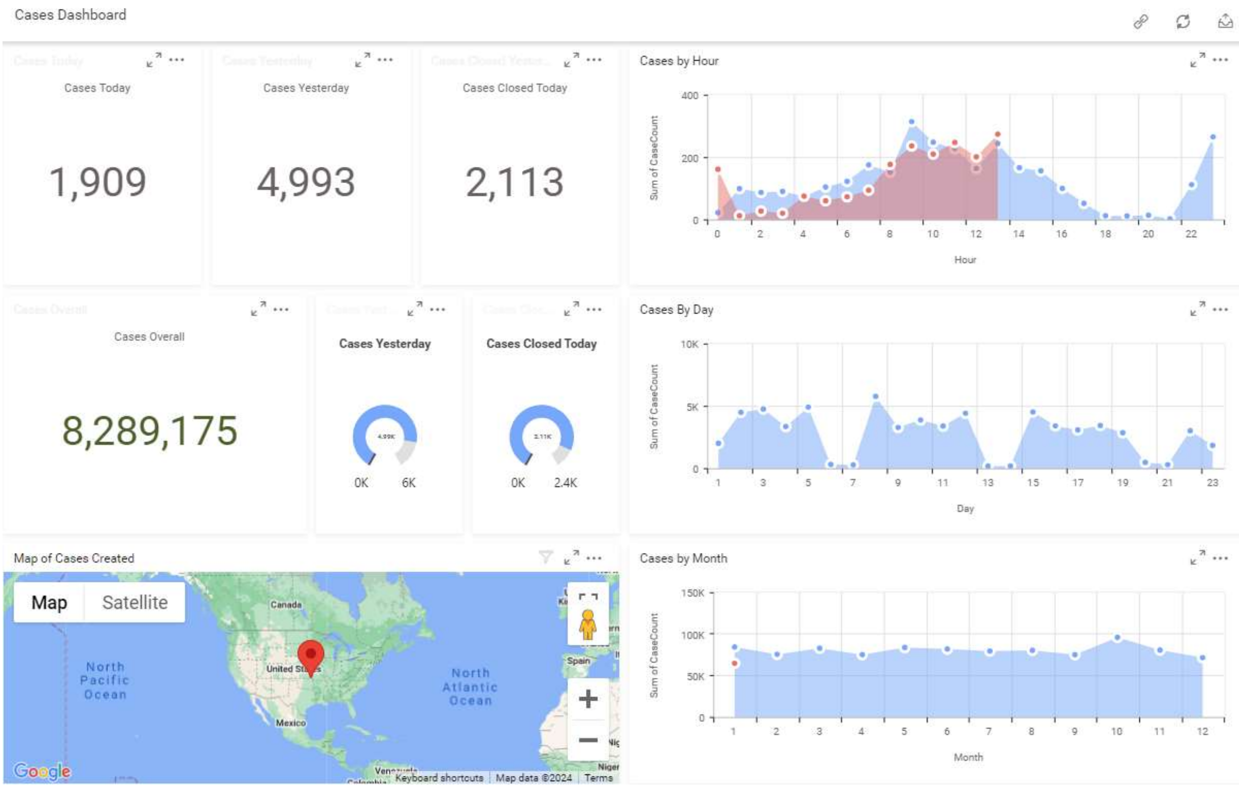
1. Main filter options: System, Type (Case Type), Run Status, and Created By. The default is Any.
2. Job List: will be displayed with any available active jobs.
3. Disable: If the job is active, this option allows user to deactivate the job. If the job is inactive, the option will be changed to Enable to allow the user to activate the job.
4. Edit: click on Edit to go to the Edit Job page.
5. Preview: shows a preview of the cases generated when the job runs.
6. Force Start: allow the Force Start the job. Once selected, the system will confirm to proceed with option to skip the next scheduled run or not.
7. Search: allows user to enter additional search options within the grid to find a specific job.
8. Export: allows export the list to Excel or PDF.
9. Create a new Job.
10. Within the Job List, scroll to the right will have option to view History of the job and remove the job. Note: only inactive jobs can be removed.

Facts

Reports are available via Facts Application. To access Facts, simply select Facts from the main left navigation.



The main Facts area page displays a cases overview dashboard report. This shows the total number of cases, cases created (today and yesterday), and cases closed (today and yesterday).



The left side report menu lists the report categories. The reports are stored under their respective report categories. The screenshot below is an illustration of the report categories.

You can access the reports in two ways:

- Click on the report category. This will expand the category and display a list of reports.
- Use the search bar. Type in the report name in the search bar and click on the magnify glass button.

Search

- Accounting and Financial Analysis
- Asset Management
- BEST
- Cases
- Configuration Tools
- Employee/Departments
- Entities
- Hotel & Restaurants
- Leasing
- M-Files
- Marketing
- Other
- Quest
- Services
- Standards
- System Networks
- Training
- Utilities
- Vendor
- Visualizations
- Workstyle
- Yardi

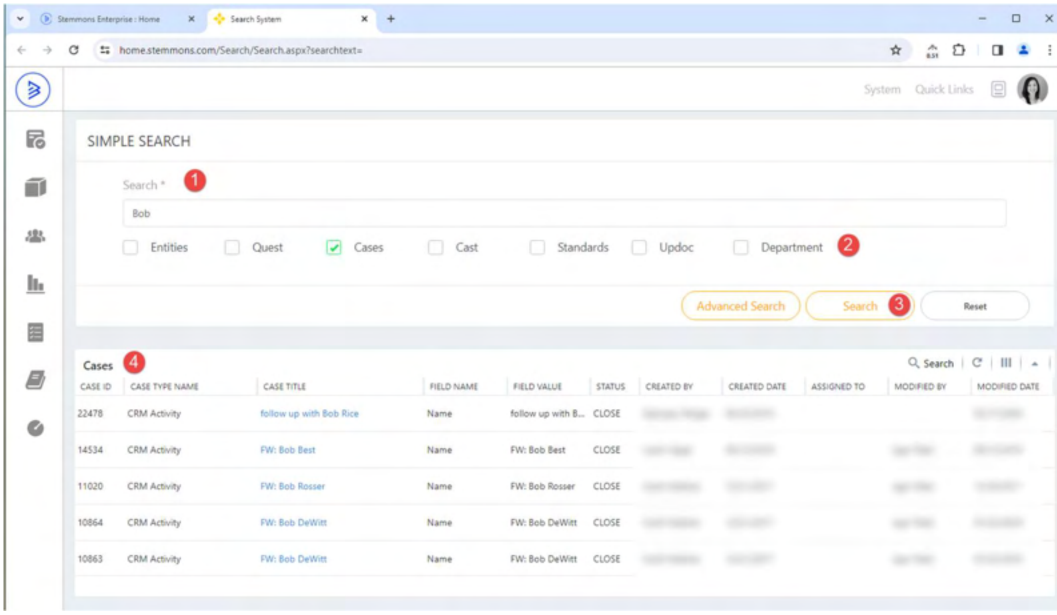
Search Application

This guide provides instructions on how to search for data.

Simple Search

Simple Search will scan through all metadata fields and return the items that match the search word. Simple Search is available for all Applications.

To access Simple Search, simply click on Simple Search from the Homepage or access via https://home.YOURDOMAIN.com/Search.



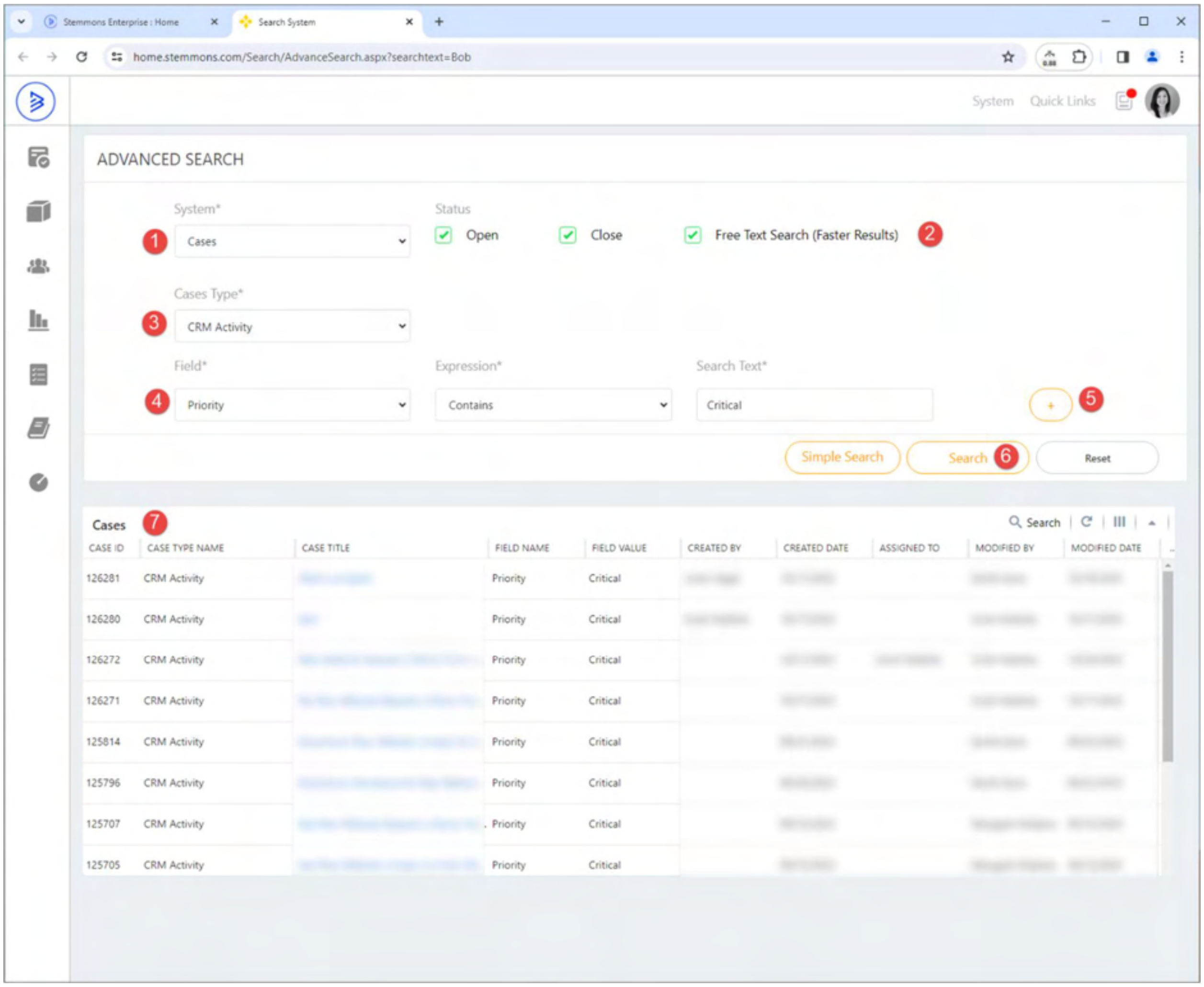
From Simple Search:

1. Enter the value you would like to find.
2. Select the Application you would like to search the item from.
3. Click on Search.
4. The system will return the list of items matched with the search criteria. Simply click on the hyperlink of individual item to access it.

Advanced Search

Advanced Search provides capabilities to search for the item with precise filters. For example, search for all cases in CRM Activity case type with Critical priority.

To access Advanced Search, drop down the search selection next to Simple Search option and select Advanced Search. Another option is to switch to Advance Search mode from Simple Search.



1. Select the Application you would like to search.
2. Select the option of Open/Close, Active/Inactive if you would like to search for open/active items only or both.
3. Select the Case Type.
4. Select the Field, Expression (*), and search value.
   (*) Contains: any item(s) has the search value.
   (*) Equal: any item(s) equal to the search value.
   (*) Not Equal: any item(s) not equal to the search value.
5. Click on + to add additional filter. *Note*: additional conditions will be treated as an AND condition.
6. Click on Search.
7. Search results return in grid. Simply click on the hyperlink of individual item to access it.