eSystems

myHelp

MYP perform

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1. terminology + abbreviations

The following abbreviations are used throughout this Guide:

- MYP – suite of modules
- ARM – Administration, Relationships + Management module

The following terms and their definitions are used throughout this Guide:

- Administer – action to create, view, edit or delete an MYP function e.g. client, provider, survey etc.
- Application modules – integrated computer software designed to help the user to perform specific tasks.
- Assistant – staff who access MYP as an assistant to other staff
- Client – clients of the subscriber who use MYP under instruction from subscriber staff
- Contacts – individuals linked to a client (e.g. staff, advisers etc) or clients who are individuals (e.g. not linked to a client organisation)
- Customer – customers of a client
- Data uploader – 3rd party who can upload financial information on behalf of clients e.g. a Bookkeeper
- Links – types of relationships that connect contacts and organisations
- MYP Champion - person appointed by an MYP subscriber to ensure that MYP modules are integrated into the organisations standard operating procedures and that all relevant staff are trained and actively using these modules
- Role – positions applied to staff and referral partners
- Staff – staff employed by the subscriber who access MYP
- Subscriber – an organisation that has subscribed to MYP

1.1. ICON DICTIONARY

Product					
General	ARM Admin, relationships + management				
eSystems	eSystems logo	Administer brand templates	Create system	Administer systems	Administer templates
	Dashboard	Email system to client	View uploaded documents	Develop action plan	Opportunity Management
	Edit system	Copy system	Administer library	Create templates	Asset register

2. eSystems

The eSystems module offers a tailored and 'best practice' system to meet the varying sales and business process needs of an organisation. Every organisation is effectively a series of moving parts (people, equipment, processes, products, money). The more effectively these parts work in unison or the fewer times these parts have to replicate the action of another part, the more efficient the organisation. If the processes of an organisation are broken down into a series of activities, many of the activities can be eliminated by using a flexible technology framework to support them. eSystems provides this capability at a fraction of the cost of building a tailored system or amending an "off the shelf" system to fit the organisation's needs.

By way of a sales example, eSystems can be used to capture the most effective sales processes and strategies of the best performing sales people. Such a system means businesses are less dependent on the one or two top performing sales people, enabling less experienced or new staff to quickly add value. In addition, eSystems can provide managers with greater objective measurements when reviewing the sales process and performance of sales staff.

To use the eSystems functions of MYP, staff should complete the following steps:

- Login to the 'MYP suite' using your personalised MYP subscriber details
- Select 'eSystems' eSystems

The following functions are available in this module:

2.1. ADMINISTER BRAND TEMPLATES

2.1.1. Create eSystem report headers + footers

eSystem users have the ability to brand eSystem reports with custom headers and footers. Headers and footers can be customised to suit both portrait and landscape reports. To create custom eSystem report headers and footers:

- Select 'Administer brand templates' or 
- Select 'Create'
- Enter the report header/footer name
- Select the report orientation
- Select the report header/footer type

NB: The following file types and sizes are required:

Portrait header - must be in either .jpg, .png or .gif format, should be high quality and not more than 2500 pixels wide by 250 pixels high.

Portrait footer - must be in .jpg, .png or .gif format, should be high quality, 2500 pixels wide and not more than 250 pixels high.

Landscape header - must be in either .jpg, .png or .gif format, should be high quality and not more than 3650 pixels wide by 350 pixels high.

Landscape footer - must be in .jpg, .png or .gif format, should be high quality, 3650 pixels wide and not more than 350 pixels high.

- Select 'Browse' to locate the file
- Select 'Upload image' then select 'Save'

2.1.2. Edit/Archive eSystem report headers + footers

- Select 'Administer brand templates' or 
- Identify the relevant template
- Select 'Edit' or 'Archive' as required
- Select 'Finish'

2.2. APPLY BRAND TO eSYSTEM REPORTS

2.2.1. Apply custom headers +footers to eSystem templates

Once the headers and footers have been created, these can be applied to the relevant eSystem template for inclusion in system reports. To apply headers and footers:

- Select 'Administer templates' or 

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- Identify the relevant template and select 'Customise'
- Select 'Branding'
- Select 'Customised' under the relevant header/footer
- Select the relevant brand from the drop-down menu
- Select which pages to apply the header and footer by selecting the relevant radio button
- Select 'Save'

2.2.2. Administer custom headers + footers to eSystem templates

- Select 'Administer templates' or 
- Identify the relevant template and select 'Customise'
- Select 'Branding'
- Select 'Customised' under the relevant header/footer
- Change to the relevant brand from the drop-down menu
- Select 'Save'

2.3. CREATE NEW SYSTEM

- Select 'Create system' or
- Select a template from the drop-down list
- Search for the relevant client
- Select a client from the drop-down list
- Select a contact (from the drop-down list) from the client organisation
- Provide a unique name to the system and select 'Next'
- Send or conduct the system as required

2.4. ADMINISTER SYSTEMS

Select 'Administer systems' or 

2.1.3. Filter systems

To filter the number of systems and make selection more efficient:

- Select an existing system from the drop-down list
- If relevant, select the relevant administration status from the drop-down list
- Search for the relevant client
- Select a client from the drop-down list
- Select 'Search'

2.1.4. Access systems

To open an existing system:

- Select the 'Access' button and use the navigation options to open the relevant section of the system

2.1.5. Actions

To complete a required action, select the 'Action' button and the relevant option:

- Email the system – to a client, prospect or contact
- View uploaded documents – if the system provides for this feature
- Develop an action plan – build a 'by whom, by when' plan
- Opportunity management – administer an opportunity in ARM (for eSystems that are linked to ARM/Opportunities)
- Edit system – e.g. rename a system
- Copy a system

2.1.6. Reports

Once an eSystem has been completed, the reports button will become visible.

To generate a report:

- Select 'Reports'
- Select the relevant tile for the desired report

2.1.7. Archive a system

- Select 'Archive'

2.1.8. Delete systems

Once an eSystem has been archived, they can be permanently deleted.

To delete a system:

- Select 'Only archived systems' from the 'Select administration status' drop-down menu
- Select 'Search'
- Identify the relevant systems to be deleted and check the relevant boxes
- Select the 'Delete selected' button and then select 'Finish'

2.5. ADMINISTER TEMPLATES

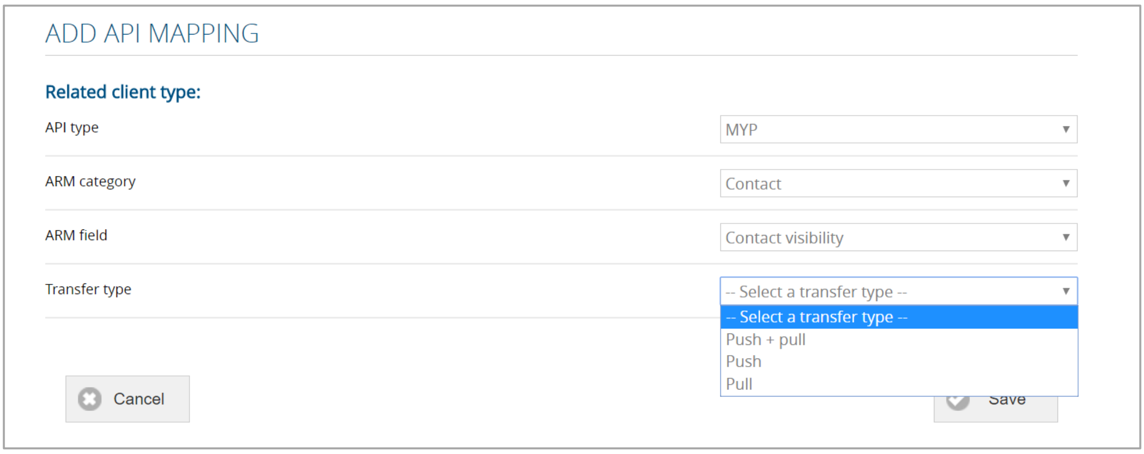
Limited modification of eSystem templates can be achieved (text font size and colour etc.) using the administer templates function.

- Select 'Administer templates' or 
- Select the relevant template
- Select 'Edit'
- Select the relevant question to be edited and select 'Edit'
- Edit the text as required and select 'Save'
- To restore default settings, select 'Restore default'

2.6. MAPPING CONTENT

Content can be mapped from/to ARM and other modules in an MYP subscription through using the administer templates function.

- Select 'Administer templates' or 
- Select the relevant template
- Select 'Edit'
- Select the relevant question to be edited and select 'Edit mappings'
- Select 'Create mapping' on the 'Add API mapping' page



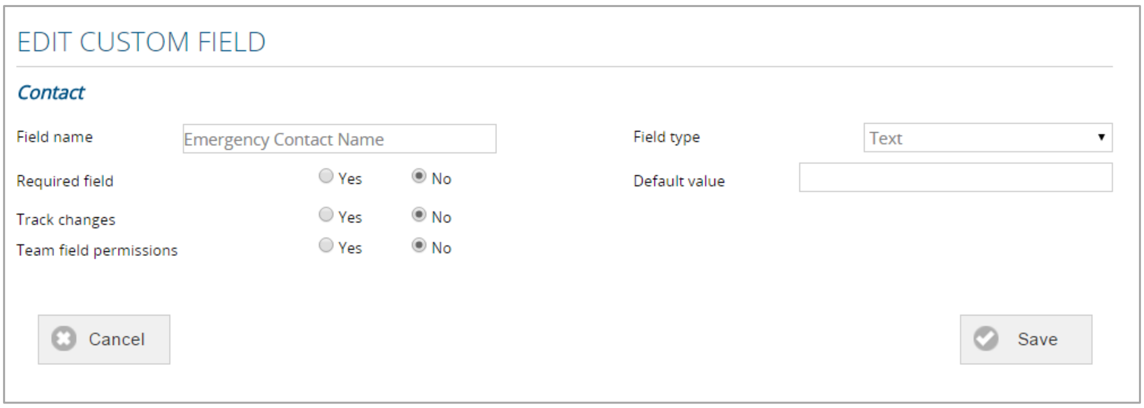
- Select 'API type' – MYP
- Select 'ARM category' and 'ARM field'
- Select transfer type

NB: In some instances you may be required to create the matching custom field in ARM. View the ARM myHelp and follow the Custom field steps prior to beginning the Mapping process.

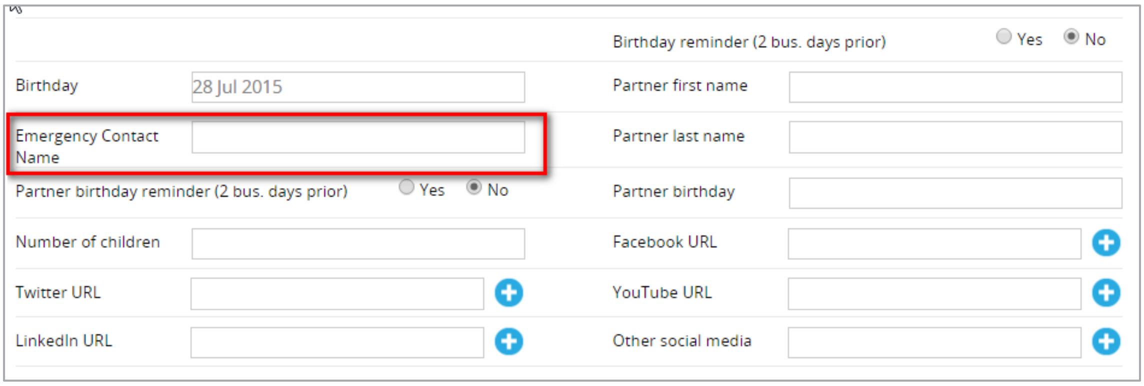
For example:

94six provides Emergency Contact details fields. To map the data between 94six and ARM, the custom files for Emergency contacts must be created in the ARM contact screens first.

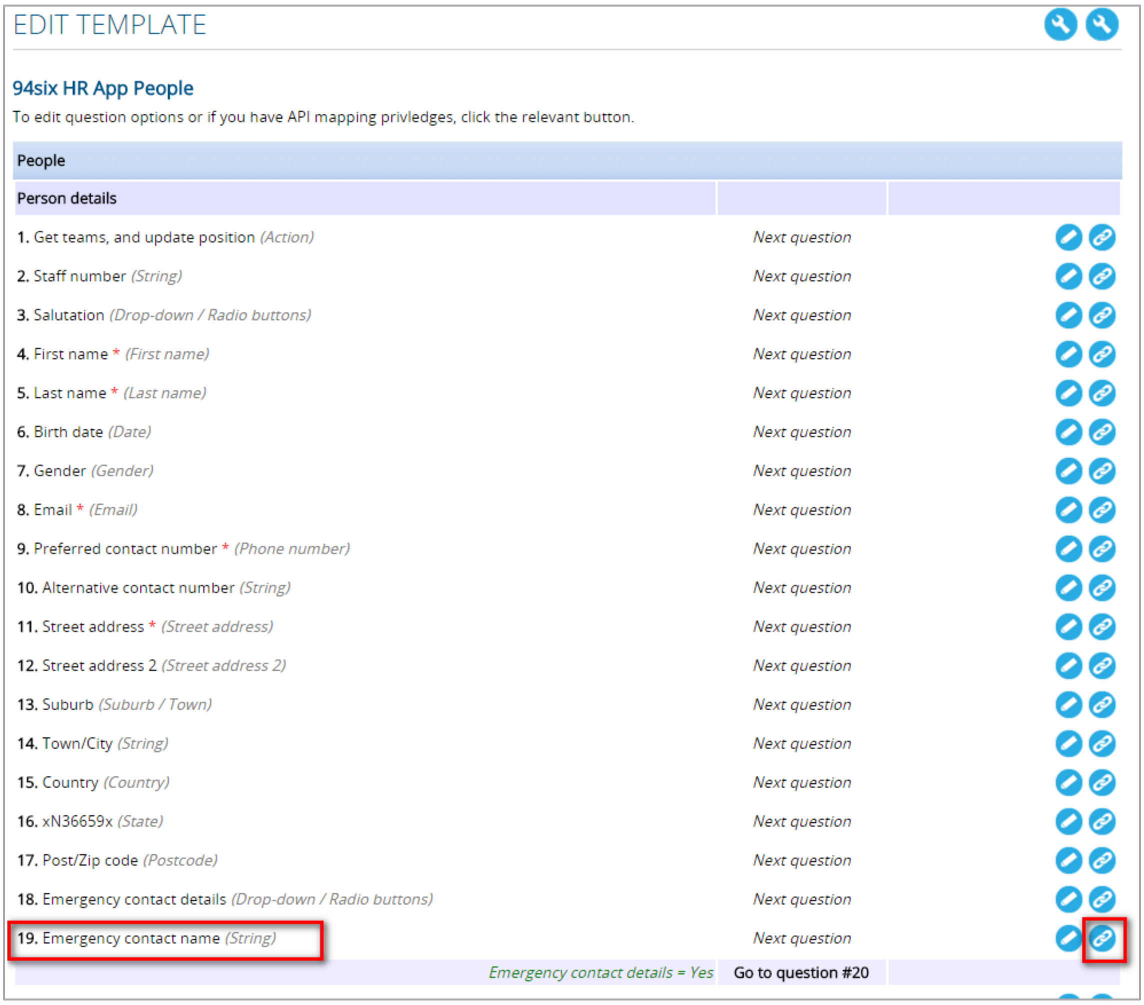
ARM – Customisation – Customise field



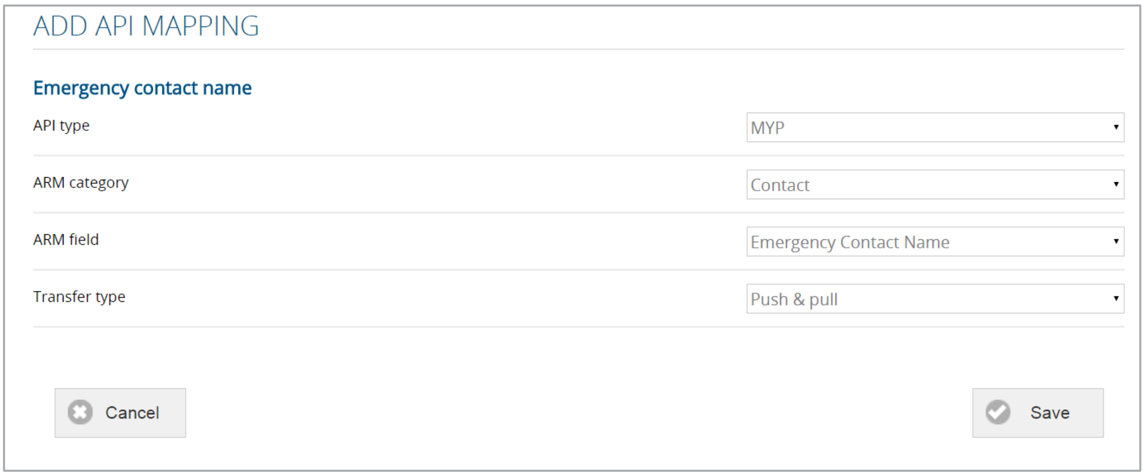
ARM - Contact screen after customisation



eSystems - Relevant template



eSystems – Edit mappings



These settings mean the Emergency contact field in ARM and 94six will always be the same. Changes to one will reflect in the other.

2.7. MANAGE DASHBOARDS

2.7.1 Create a dashboard

To create dashboard:

- Select 'Dashboard' or 
- Select 'Manage'
- Select 'Create'
- Select the dashboard type from the drop-down menu (e.g. dashboard on a survey question)
- Select the eSystem from the drop-down menu
- Select the required options (e.g. question) from the drop-down menu
- Select the chart type from the drop-down menu
- Enter the dashboard name
- Select the dashboard options to display the dashboard graphic
- Select the staff member to access this dashboard
- Select 'Next
- Select 'Edit' to edit an existing dashboard group
- Select 'Archive' to archive an existing dashboard group

3. MYP training + support centre

For training and support options, please refer to MYP Administration, Relationships + Management (ARM) myHelp.