The Business Improvement Company

The Platform

BI Administration Guide

January 12, 2006

Client Administration Guide, Revision A, 1/12/2006

Trademarks

Table of Contents

SECTION I – GETTING STARTED

This section includes the following topics:

The Platform – An Overview

The Platform is a web-based application designed to reward participant's performance and deliver results. The program rewards participants with points, cash, or recognition. Points are accumulated through AwardperQs, which are redeemable for merchandise when a participant or team meets specific performance goals.

The Platform consists of the following promotion modules:

- **Product Claims** – a type of promotion that rewards participants when they have submitted a claim and met all of the criteria set forth by the promotion program.
- **Recognition** – participants take part in a program that recognizes employees who have performed well and rewards participants when they have been recognized for their performance.
- **Quizzes** – quizzes test participants' knowledge about specific topics and can be established for specific audiences. Typically, AwardperQs' deposits or certificates are associated with a passing score.

NOTE: Any of the promotions can have a sweepstakes component that may include a sweepstakes drawing for AwardperQs.

The Platform User Interface

The Platform user interface is designed for easy navigation around your site. The following features provide quick access to features and functions in the program.

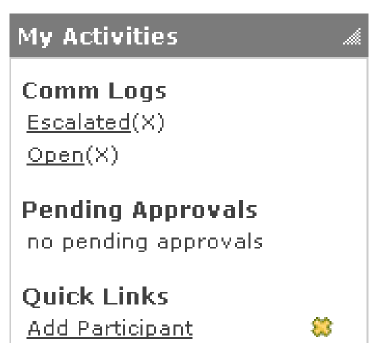
Navigation tab

The Navigation tab appears at the top of each page in the Platform. Clicking on a tab takes you to a different function and page. The Navigation tab may look different depending on whether you are a participant, user, administrator, approver, or have other site responsibilities. What appears on the Navigation tab is determined by the participant or user profile that is set up.

QuickLinks

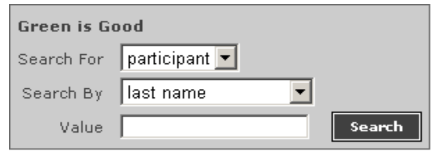
QuickLinks are links to frequently used pages or functions in the Platform. Up to five Quick Links are allowed on the home page's My Activities box. A QuickLinks button is found at the top of a page for most Platform functions. Clicking the QuickLinks button, (see example below), places that function and a link to it on the home page.

Click to remove the link.



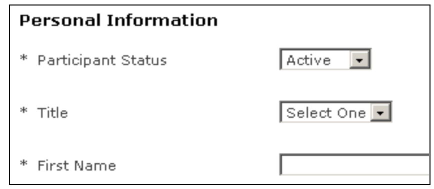
Search

The search box appears in the upper right corner of the home page. It provides quick access to finding information about participants, claims, and comm (communication) logs.



Required fields

Many fields in the Platform are shown with an asterisk next to the field's label. This indicates required information. If you forget to fill in the information, the program will remind you with an error message that tells you exactly what you missed.



Sorting items in lists

Sometimes a list of items shown on a page can get quite long and you may want to view the list in a different sequence. Clicking an underlined column heading will re-sort the list.

Country	Status	Campaign	Code	Bank Code	Addressing	Supplier
Canada	Active	333340	ca	CAN	North American	BI Bank
France	Active	333360	fr	FRA	International	BII
Italy	Active	333360	it	ITA	International	BII
Mexico	Active	333350	mx	MEX	North American	OPISA
United Kingdom	Active	333360	gb	GBR	International	BII
United States	Active	333330	us	USA	North American	BI Bank
Albania	Inactive	333360	al	ALB	International	BII
Algeria	Inactive	333360	dz	DZA	International	BII
Argentina	Inactive	333360	ar	ARG	International	BII

Online Documentation

This guide is also available online in Adobe's PDF format, which utilizes a number of navigation aids. Bookmarks are set up so you can easily and quickly go to a different section or topic within the guide. In addition, any text that is underlined and shown in blue is a hyperlink that, when clicked, will take you immediately to that topic. To view this guide in PDF format, click the Help tab and select Documentation.

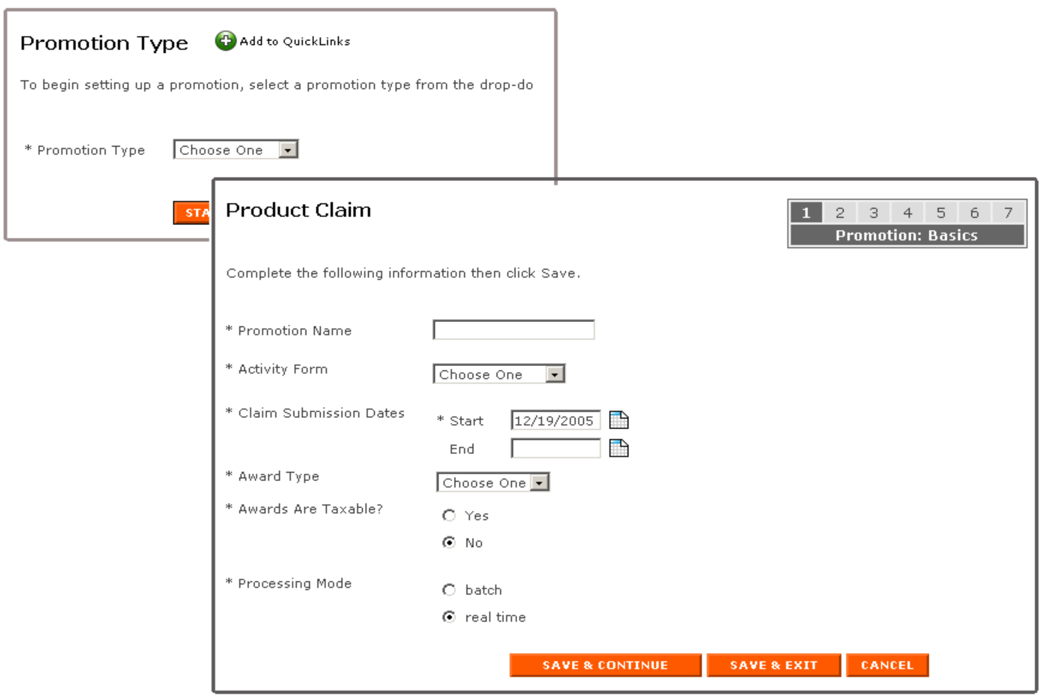
These are just a few of the features that will make your experience using the Platform easier. For additional information about the user interface, refer to Home in the Section IV Reference part of this guide.

NOTE: To return to a previous page in the Platform, ***do not* use the Internet browser BACK button.** Instead, always use the BACK or CANCEL button that appears on the application page.

Use of the Promotion Wizard

Using the Platform to set up your site and promotions is easy. Each promotion type uses a Wizard that guides you through the setup. For example, the Product Claims Wizard guides you through the completion and setup of the following information in the proper sequence.

1. Product Claim Promotion: **Basics**
2. Product Claim Promotion: **Form Rules**
3. Product Claim Promotion: **Audiences**
4. Product Claim Promotion: **Products and Payouts**
5. Product Claim Promotion: **Approvals**
6. Product Claim Promotion: **Notifications**
7. Product Claim Promotion: **Rules Text**



When completed, the final step asks you to mark it as complete or, if necessary, go back and edit the promotion. You can also copy the promotion you just created and use it for creating another one.

Who Should Use this Guide?

This guide is primarily intended for the BI Administrator/Project Manager who has responsibility for administering a client's online employee recognition and award programs. This guide is also intended for the BI Process Team who has a need to understand and support the Platform for clients of BI. The major users of the Platform include:

- **User** – A user is a BI administrator or client administrator who is not eligible to receive awards in a project. A user has a unique role as compared to a participant and a PAX administrator. A user may be an approver, site administrator, BI Administrator, BI Project Manager, or client administrator. The user works closely with the BI Project Manager or the BI Project Manager may be a user and BI site administrator.
- **PAX Administrator** – a participant administrator (PAX Administrator) is a special participant with administrative rights to the Platform.

NOTE: THIS GUIDE IS NOT INTENDED FOR THE PARTICIPANT. A participant takes part in the company's promotion and incentive programs and may be awarded points based on performance, which are redeemable for merchandise or other incentives. A participant has no administration responsibilities.

What's in this Guide?

This guide plays an integral part in the implementation and success of your performance and reward program. Please read and understand it thoroughly. It contains how-to instructions and information about your program.

Inside **Section II** you will find information about:

- Defining and Configuring the Platform
- Setting Up Your Site Using Content Manager
- Setting Up Budgets
- Adding and Maintaining Participants/Users
- Setting Up Promotions

Section III includes information on:

- Managing Promotions

and **Section IV** includes:

- reference information with detailed information about program features and promotions. Refer to this section when necessary.

This guide is also available in Adobe's PDF format, which utilizes a number of navigation aids. Bookmarks are set up so you can easily and quickly go to a different section or topic within the guide. In addition, any text that is underlined and shown in blue is a hyperlink that, when clicked, will take you immediately to that topic. To view this guide in PDF format, click the Help tab and select Documentation.

Before You Begin

Before you start making changes to your site, work with your Development Team, Product Owner, or Process Team to make sure the following items have been completed and/or reviewed:

- Delivery Checklist 1 – Installation has been completed. Delivery Checklist 1 requires verification of SRF information, review of the Bank Account Setup checklist, completion of the bank Account Campaign setup form, and other BI Admin and BI Technical setup tasks.
- Delivery Checklist 2 – Verify Installation has been completed. Many of the tasks identified in this checklist are described in more detail in this manual.

For additional information, consult with the Product Owner or Business Analyst.

System Requirements

The Platform user interface is best viewed using Microsoft's Internet Explorer, version 5.5 or higher. If you prefer to use a different browser, use the latest version. Please be aware that features used on the Platform may not perform as well when used with other browsers.

- If you are using Macintosh systems, use the latest version of Internet Explorer for the Macintosh.
- For best results, use a display resolution set to 1024 x 768.
- For required image standards to apply to a web page, refer to the System Requirements in Appendix A.

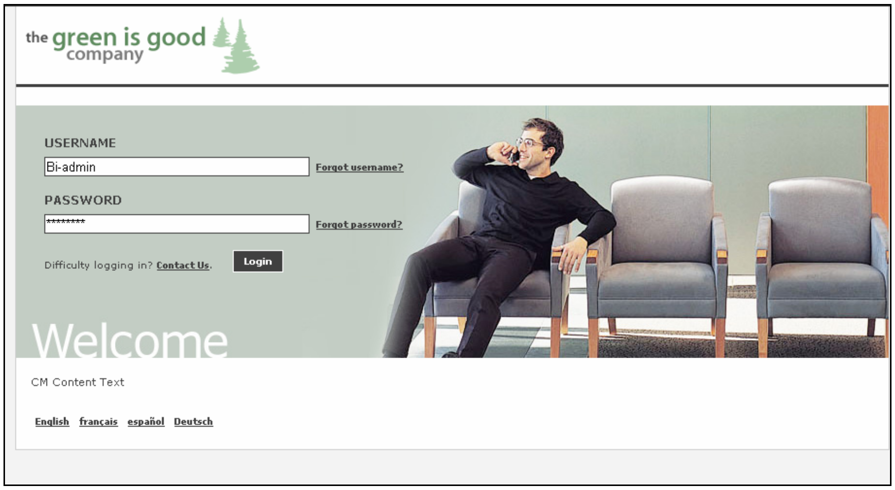
Log into the System

The Login page is your entry point to the Platform. Login enables a valid user ID and password to log into the system and view the home page.

NOTE: Once logged in, the logout option appears in the upper right hand corner on all pages. Don't forget to log out when you are finished performing various administrative tasks.

To log into the Platform:

1. Start Internet Explorer or your preferred Internet browser.
2. Enter your URL in the browser address line and press Enter. The Login window appears.



3. Enter your LOGIN and PASSWORD.
4. Click the LOGIN button. The program displays the Platform home page.

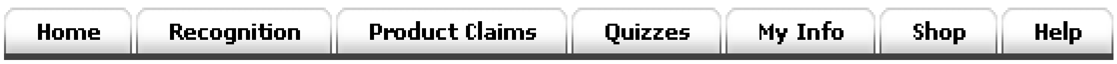
NOTE: The first time you log in you will have the opportunity to change your password.

As a user, you may have several administrative privileges. The administrative functions that you can perform appear as tabs on the home page; an example is shown below.

If you are a PAX Administrator (special participant/user) such as a report administrator or an approver you can also be a participant. A participant with administrative privileges might have tabs on the home page that look something like the tabs shown below:

As a PAX Administrator you may have proxy privileges for another administrator or participant, be an approver, and edit and view reports.

A participant with no administrative privileges has tabs on the home page that looks something like the following:



NOTE: The Platform automatically logs you out approximately 20 minutes after no activity. If after twenty minutes you try to click on a link, tab, button, or perform another function, the program will automatically take you back to the login page. You will then have to log back in.

For more information about the Home page and other functions, refer to Home in the SECTION IV – REFERENCE part of this guide.

SECTION II – SETTING UP THE SITE

This section includes the following topics. Use this list of topics in combination with the *Delivery Checklist 2 — Verify Installation* to complete verification and set up of your client's site.

If you need more detailed information than what is described in this section of the manual, refer to the SECTION IV – REFERENCE part of this guide. The reference section is organized (in alphabetical order) by the navigation tabs that appear across the top of the Platform.

Installing and Verifying the Platform

Before You Begin Installation

Only valid BI employees can log into the system and install the Platform application for a client. You can obtain a list of valid BI employees from the compliance database. Make sure you have completed all of the information that is requested in the *Platform Delivery Checklist 1 – Installation V2.2i* and that it is initialed by the responsible manager. You should know or have the following information available prior to installing the Platform:

- ❑ Client name
- ❑ Infrastructure data such as database schema name, password, instance and server names for DEV, QA, PPRD, and PROD environments
- ❑ CVS branch name
- ❑ Client desired website skins
- ❑ PID
- ❑ Client logos, if applicable
- ❑ Program/project name
- ❑ Project Manager, Technical Analyst, & Lead Programmer assigned to the client
- ❑ Application server cluster name
- ❑ Web server document root
- ❑ Promotion modules to implement
- ❑ URL address (standard or custom)
- ❑ Core system variables (see Table 1): (You must know what these values are prior to installation.)

Table 1 – Core System Variables

Variable	Type	Value
Password expire period (ms)	Long	
Client name	String	
Can all users submit as a proxy?	Boolean	__ Yes __ No
Email notification address	String	
Force password reset for pax	Boolean	__ Yes __ No
Password uses Regex? (see note) (Regex is short for regular expression. A regex is a string of text that enables a user to create pattern matching, in this case, for passwords. If you are using Regex, contact your Development Team member for more information)	Boolean	__ Yes __ No
Can password be reused?	Boolean	__ Yes __ No
Contact Us Email	String	
Shopping link used?	Boolean	__ Yes __ No
Allow eStatements?	Boolean	__ Yes __ No
Password minimum length	Integer	
Authorization failure count for lockout	Integer	
System email address	String	
Is AwardBanQ used?	Boolean	__ Yes __ No
Restrict proxy PAX search to node level and below	Boolean	__ Yes __ No
Allow contacts?	Boolean	__ Yes __ No
Client launch date	Date	
Allow text messages	Boolean	__ Yes __ No

Installing the Platform

The Platform uses an installation wizard that guides you through the entire process. With the information you have in hand, it's only a matter of filling out the forms that are organized into:

- Project Basics
- Look and Feel
- Infrastructure
- Modules and System Variables

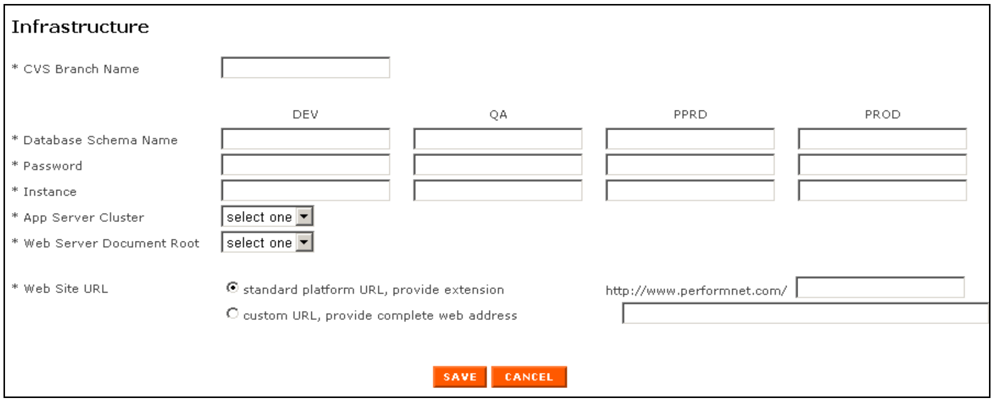
To install the Platform:

1. Open your internet browser and enter the URL. (Obtain the URL from your Development Team member.) The program displays the login page.
2. Enter your network username and password. The program displays the *Beacon Install Wizard* page.
3. Select the name of the project from the drop-down list then click CONTINUE. The program displays the *Project Basics* page.
4. Select a Project Manager, Technical Analyst, and Lead Programmer who are working on the project.
5. Click SAVE. The program displays the *Program Overview* page.
6. After the Basics information is captured, click edit next to each section to complete the requested information.
7. After you complete each section, click the action button located below each section summary. For example, after completing the Infrastructure section, click CVS BRANCH then click REQUEST APPLICATION RESOURCES.
8. After you complete each section, click the action button located below each section summary. For example, after completing the Infrastructure section, click CVS BRANCH then click REQUEST APPLICATION RESOURCES. This will send an email to BI Corporate Technology.

If necessary, review the following that describes information for each section on the install program.

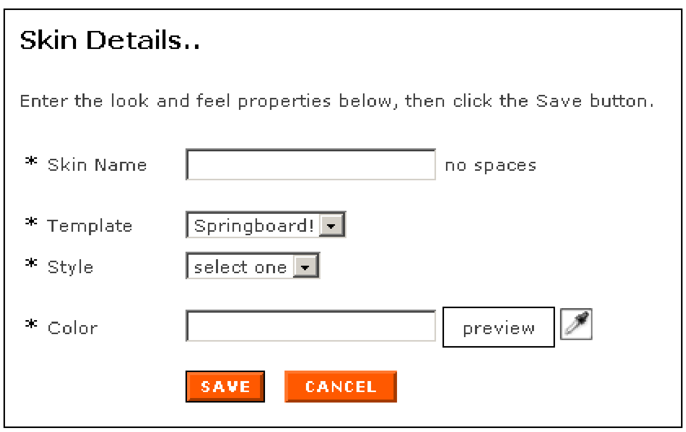
Installation Sections

Infrastructure



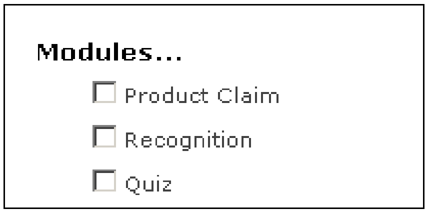
- Information for the *Infrastructure* section can be obtained from Corporate Technology and/or the OP Center.
- Currently, cluster 18 is the App Server Cluster that is used, although this can change.
- The standard platform URL is performnet.com/<client.name>.

Look and Feel

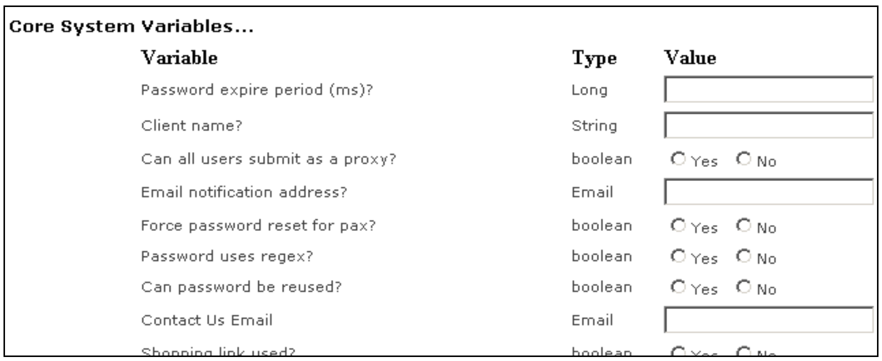


- Use a descriptive skin name.
- Use the color picker to select a different color than what is used for the standard template (i.e., Springboard).

Modules



- Check the promotion modules that apply to this client.
- You must complete the entire core system variables that are shown on the application page (refer to Table 1 on page 16). Most of the system variables are self-explanatory.

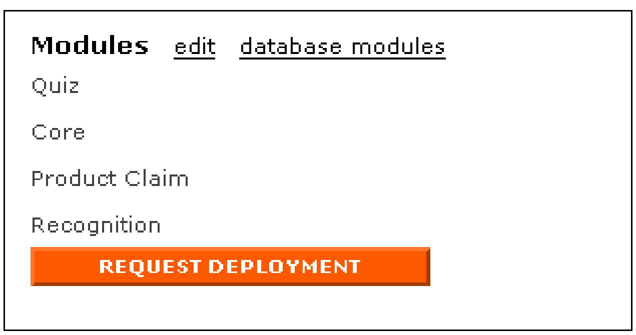


Core System Variables...

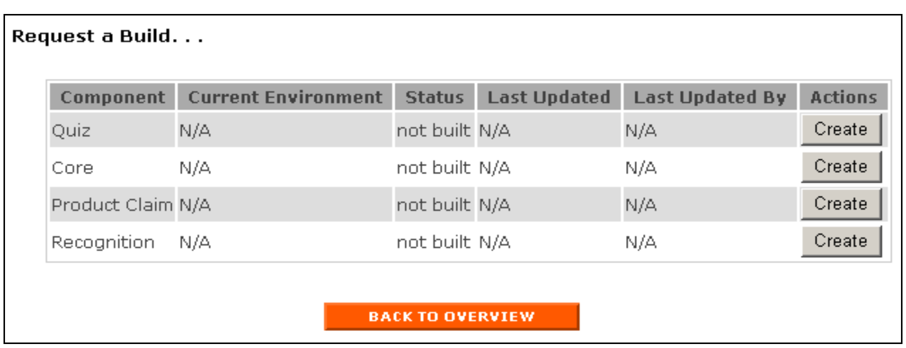
Variable	Type	Value
Password expire period (ms)?	Long	
Client name?	String	
Can all users submit as a proxy?	boolean	Yes No
Email notification address?	Email	
Force password reset for pax?	boolean	Yes No
Password uses regex?	boolean	Yes No
Can password be reused?	boolean	Yes No
Contact Us Email	Email	

Creating a Build and Confirming the Installation

1. After completing all the forms, click on the Modules database modules link from the *Project Overview* page to request a build.



2. From the *Request a Build* page, click the Create button. This sends an email to the Delivery Team Java mailbox, requesting a build of the component. The Core component includes all components that make up the application except for the promotion modules.



Request a Build. . .

Component	Current Environment	Status	Last Updated	Last Updated By	Actions
Quiz	N/A	not built	N/A	N/A	Create
Core	N/A	not built	N/A	N/A	Create
Product Claim	N/A	not built	N/A	N/A	Create
Recognition	N/A	not built	N/A	N/A	Create

BACK TO OVERVIEW

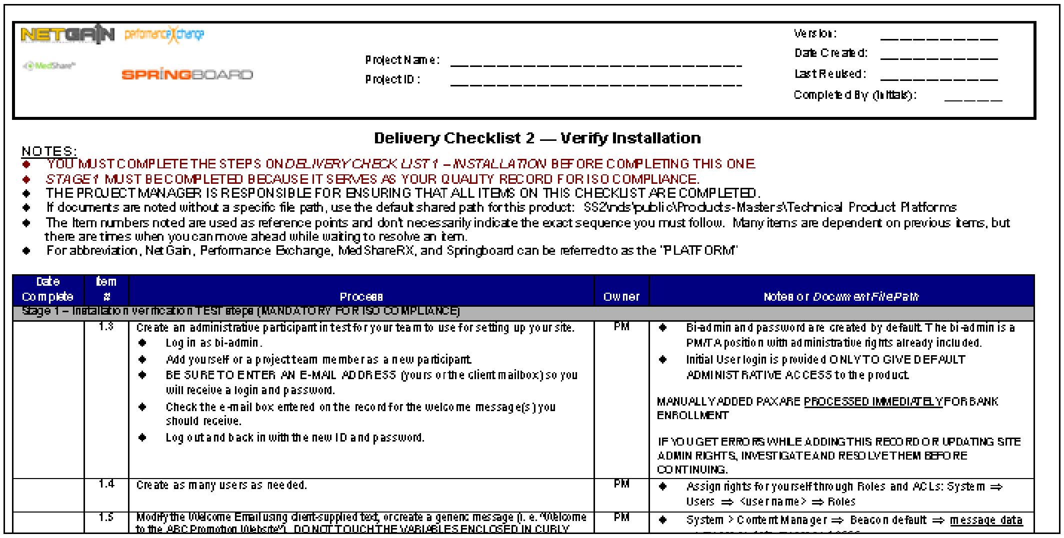
3. After you have requested a build for each component, return to the *Overview* page and click the REQUEST DEPLOYMENT button. The wizard will then provide confirmation of your deployment request.

   After deployment, the following items are created automatically using default data for:

   - All database structures and stored procedures needed for the application to work
   - Escalation hierarchy for comm logs
   - FAQ text
   - Pick lists
   - Processes and process parameters
   - Roles and ACLS
   - User hierarchy
   - Text for all communications (email/text messaging) in the message library and all Content Manager data
   - Suppliers and countries
   - Left and right rail tile default arrangements
   - Login related rules
   - Login ID for the associate ID
   - System administrator login (bi-admin)

Verifying the Application

Perform and complete all the steps as outlined in *Delivery Checklist 2 – Verify Installation*. Several steps in the checklist refer to the steps described in this section of the manual. Refer to this section as necessary.


Project Name: __________
Project ID: __________
Version: __________
Date Created: __________
Last Revised: __________
Completed By (Initials): _____

Delivery Checklist 2 — Verify Installation

NOTES:
- YOU MUST COMPLETE THE STEPS ON *DELIVERY CHECK LIST 1 – INSTALLATION* BEFORE COMPLETING THIS ONE.
- *STAGE 1* MUST BE COMPLETED BECAUSE IT SERVES AS YOUR QUALITY RECORD FOR ISO COMPLIANCE.
- THE PROJECT MANAGER IS RESPONSIBLE FOR ENSURING THAT ALL ITEMS ON THIS CHECKLIST ARE COMPLETED.
- If documents are noted without a specific file path, use the default shared path for this product: SS2\nds\public\Products-Masters\Technical Product Platforms
- The Item numbers noted are used as reference points and don't necessarily indicate the exact sequence you must follow. Many items are dependent on previous items, but there are times when you can move ahead while waiting to resolve an item.
- For abbreviation, Net Gain, Performance Exchange, Med ShareRX, and Springboard can be referred to as the "PLATFORM"

Date Complete	Item #	Process	Owner	Notes or *Document File Path*
Stage 1 – Installation verification TEST steps (MANDATORY FOR ISO COMPLIANCE)				
	1.3	Create an administrative participant in test for your team to use for setting up your site. ◆ Log in as bi-admin. ◆ Add yourself or a project team member as a new participant. ◆ BE SURE TO ENTER AN E-MAIL ADDRESS (yours or the client mailbox) so you will receive a login and password. ◆ Check the e-mail box entered on the record for the welcome message(s) you should receive. ◆ Log out and back in with the new ID and password.	PM	◆ Bi-admin and password are created by default. The bi-admin is a PM/TA position with administrative rights already included. ◆ Initial User login is provided ONLY TO GIVE DEFAULT ADMINISTRATIVE ACCESS to the product. MANUALLY ADDED PAX ARE PROCESSED IMMEDIATELY FOR BANK ENROLLMENT IF YOU GET ERRORS WHILE ADDING THIS RECORD OR UPDATING SITE ADMIN RIGHTS, INVESTIGATE AND RESOLVE THEM BEFORE CONTINUING.
	1.4	Create as many users as needed.	PM	◆ Assign rights for yourself through Roles and ACLs: System ⇒ Users ⇒ <username> ⇒ Roles
	1.5	Modify the Welcome Email using client-supplied text, or create a generic message (i. e. "Welcome to the ABC Promotion Website"). DO NOT TOUCH THE VARIABLES ENCLOSED IN CURLY	PM	◆ System > Content Manager ⇒ Beacon default ⇒ message data

Adding Users and Participants

Adding Participants

A participant takes part in the promotion program. Participants may be an employee, an approver, or a special participant with administrative rights. The Participants tab enables you to search for, add, and update a participant profile.

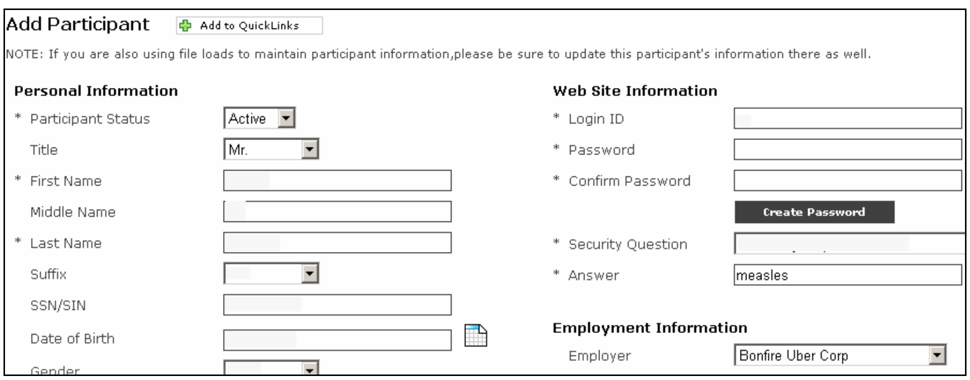
You can add participants individually or upload an entire file that contains all of the participant's specifics, such as name, address, telephone number, login, employer, and characteristics.

NOTE: Uploading a file is the most efficient method for initial startup. To upload a file, refer to File Loads on page 129.

Use the following methods when you have only a few participants or users to add.

To add a participant:

1. From the Home page, click on the Participants tab.
2. Select Add a New Participant. The program displays the Add Participant page.



Note: To generate a random password automatically, click Create Password. Depending on how the program is set up, the participant can change their password initially or when desired.

3. Enter the required data, (shown with an asterisk), then click Save. The Wizard goes to the next required page.

To update existing participant information, refer to Participants in the Reference section of this guide.

If you are having an entire file of participant data loaded, be sure to update the participant's information in the File Loads as well.

See Also

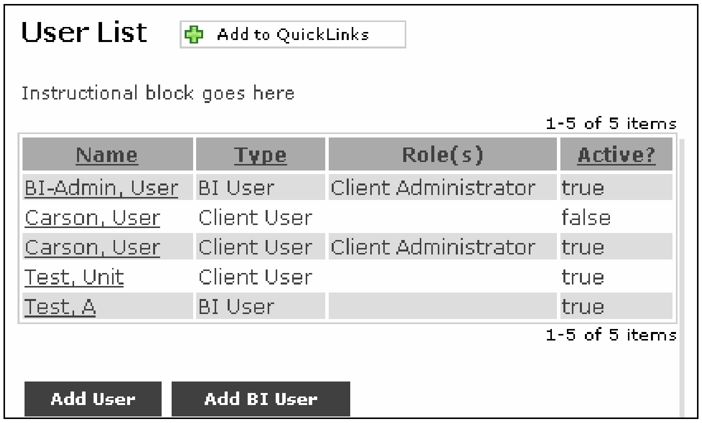
- Participants on page 83
- File Loads on page 129

Adding Users

A user only has administrative rights to the Platform and is not a participant in any promotion. A user may be an approver, site administrator, BI administrator, BI Project Manager, or a Client Administrator such as a manager or employee assigned with responsibility for administering the site.

To add a user:

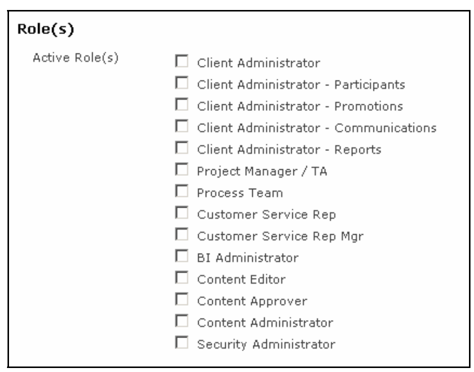
1. Click the System tab and select Users. The *User List* page appears showing a list of current users.



2. Click Add User. The Add User page appears where you can enter a number of user characteristics, create a password, and identify their role and hierarchy in managing and using the site.

   NOTE: Add BI User is the same as Add User, except, you *do not* select the hierarchy because a BI User is not part of the client organization. It's a good idea to add the BI Project Manager as a BI User in the system.

   If a user is also a participant, check Client Administrator – Participants as the user Role on the *Add User* page (or whatever role was defined as an administrator and participant).



3. When finished, click Save. The program returns to the *User List* page.

Performing File Loads to Add Participants and Users

BI personnel will continue to have responsibility for loading participant and user data using the file load procedure, as described in File Loads on page 129.

See Also

- Participants on page 83
- Updating and Inactivating Users and Participants on page 52
- Users on page 179
- File Loads on page 129

Setting Up Roles and ACLs

Setting Up Roles

Roles play an important part in determining the responsibilities and functions that each user has in the system. Roles are defined during the system definition and configuration phase of a project. Any changes to a role and its functions, or addition of a new role, require a special request to the Development or Process Team.

NOTE: In order to create a new role, you must obtain the proper Role Name and Code from the Development Team.

To add a new role or view currently defined roles:

1. Click on the System tab and select Roles. The Platform displays a listing of currently defined roles.

1-14 of 14 items

Role Name	Code	Active
Client Administrator	CLIENT_ADMIN	yes
Client Administrator - Participants	CLIENT_ADMIN_PAX	no
Client Administrator - Promotions	CLIENT_ADMIN_PROMO	no
Client Administrator - Communications	CLIENT_ADMIN_COMM	no
Client Administrator - Reports	CLIENT_ADMIN_RPT	no
Project Manager / TA	PROJ_MGR	yes
Process Team	PROCESS_TEAM	yes
Customer Service Rep	CSR	no
Customer Service Rep Mgr	CSR_MGR	no
BI Administrator	BI_ADMIN	no
Content Editor	ContentEditor	yes
Content Approver	ContentApprover	yes
Content Administrator	ContentAdministrator	yes
Security Administrator	SecurityAdministrator	yes

1-14 of 14 items

Add a Role

2. Click Add a Role. The Platform displays the *Create Role* page. In order to create a new role, you must obtain the proper Role Name and Code from the Development Team.

3. Complete the information and click Save.

See Also

- Roles on page 173

Setting Up ACLS

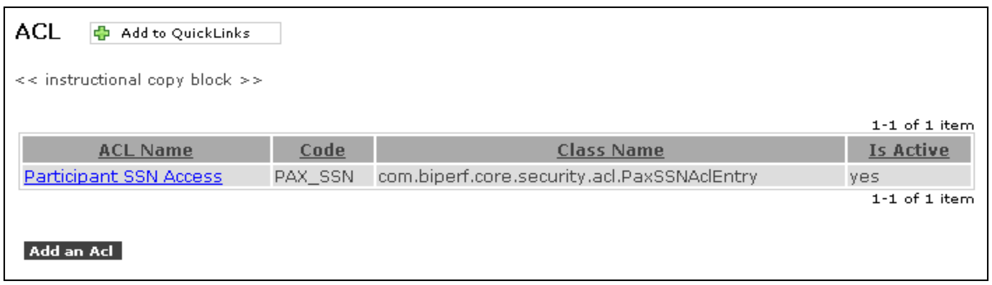
ACLs (Access Control Lists) determine user access to specific fields or what is viewed, such as social security numbers, account numbers, and bank numbers. For example, the ACL for a participant's social security number (Participant_SSN_Access) provides four different permissions levels that can be assigned: VIEW_NONE, VIEW_MASK, VIEW_FULL and EDIT.

Specific ACLs and access controls are set up during the system definition and configuration phase. For more information, contact your BI Technical Advisor or Development Team.

NOTE: Prior to adding an ACL, you must obtain the appropriate Code and Class Name from the Development Team.

To add an ACL or view currently defined ACLs:

1. Click on the System tab and select ACLs. The Platform displays a listing of currently defined ACLs.



2. Click ADD AN ACL. The Platform displays the Create ACL page. You must obtain the appropriate Code and Class Name from the Development Team.
3. Enter the appropriate information and click Save.

See Also

- ACLs on page 118

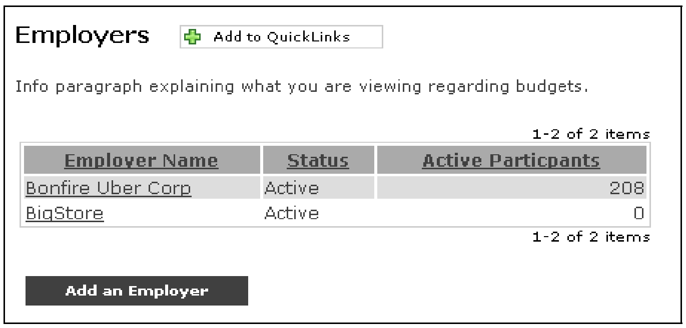
Setting Up Employers

Every participant is associated with an active employer. The System>Employer navigation allows the setup of an employer.

Qualified users can create a new, unique, employer record by entering the employer name and other demographic information as needed.

To set up an employer:

1. Click on the System tab and select Employers. The Platform displays the current listing of employers and active participants, or allows you to add a new employer.



2. Click ADD AN EMPLOYER. The Platform displays the *Add Employer* page.
3. Enter the appropriate information and click SAVE.

See Also

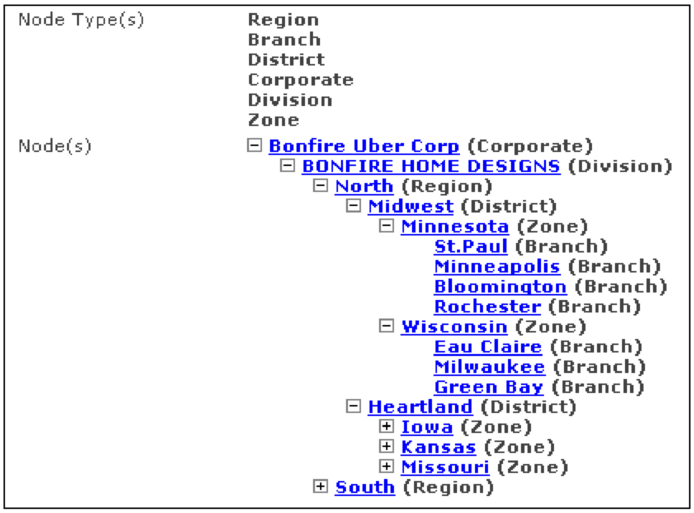
- Employers on page 128

Setting Up Hierarchies

Hierarchies (tree-like structures) define how an entity is organized. An organizational hierarchy is one example but not necessarily the only one. You establish a hierarchy within the Platform in order to define access control, reports, approvals, and for use in list builder.

Creating a hierarchy for an organization first requires defining the primary node then defining node types, individual nodes within the primary node, and finally node characteristics or attributes.

The chart below shows a sample hierarchy for the Bonfire Uber Corporation.



To set up the primary node within a hierarchy:

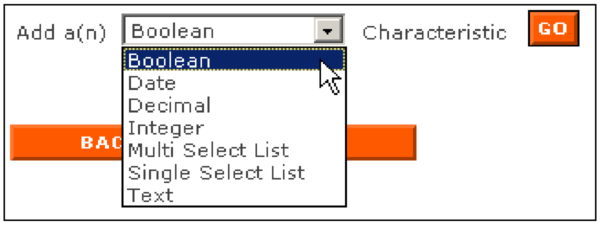
1. Click on the System tab and select Hierarchy Management. The Platform displays the *Hierarchies* page.
2. Click the ADD HIERARCHY button. The Platform displays the *ADD HIERARCHY* page.
3. Complete the information. If node types are already defined, select the node types to assign to the hierarchy then click SAVE.

NOTE: You can only create one primary hierarchy. If no node types are defined, go to the System tab and select Hierarchy Node Types (refer to following steps).

To create node types and node characteristics:

1. Click on the System tab and select Hierarchy Node Types. The Platform displays the *Node Types* page.
2. Click the ADD NODE TYPE button. The Platform displays the *Add Node Type* page.
3. Enter a Node Type Name then click Save. The Platform returns to the *Node Types* page, listing all the Node Types created. From here you can create node characteristics.
4. Click on the name of the node type, for example: Corporate. The Platform displays the *View Node Type* page.

5. Select a characteristic type from the Add a(n) ________ Characteristic drop-down list then click GO.

   For a description of each of the characteristic types, refer to Table 60 on page 138. Examples of node characteristics include:

Characteristic Name	Characteristic Value Example	Characteristic Type
Market (Industry)	Consumer, Technology, Medical	Text
Volume	Less than 1 million, 1 – 29 mil, 3-5 mil	Single Select List
Size	Super, Regular, Small	Single Select List
Open date	Date	Date
Union Employee	Yes/No	Boolean

6. After clicking GO, the Platform will display the *Node Type* characteristic page where you can further define the characteristic that will be used.
7. When finished click SAVE. The Platform displays the *Node Type* page with the Node Type you created and its characteristic(s).
8. Continue defining additional characteristics as necessary.

See Also

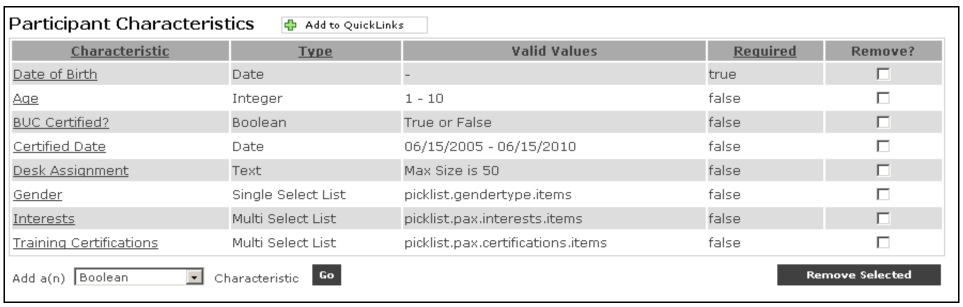
- Hierarchy Import File layout on page 131
- Hierarchy Management on page 140
- Example Hierarchies on page 144
- Hierarchy Node Types on page 146

Defining Participant Characteristics

Participant characteristics allow you to define specific characteristics about participants and users, such as age, certifications, gender, interests, and so forth. Participant Characteristics are found on the *Add Participant* page.

To create participant characteristics:

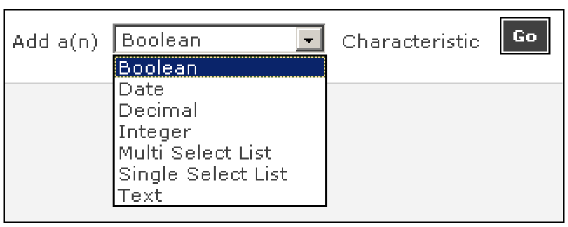
1. Click on the System tab and select Participant Characteristics. The Platform displays the current set of characteristics and values, or allows you to edit or add new characteristics.


Participant Characteristics Add to QuickLinks

Characteristic	Type	Valid Values	Required	Remove?
Date of Birth	Date	-	true	☐
Age	Integer	1 - 10	false	☐
BUC Certified?	Boolean	True or False	false	☐
Certified Date	Date	06/15/2005 - 06/15/2010	false	☐
Desk Assignment	Text	Max Size is 50	false	☐
Gender	Single Select List	picklist.gendertype.items	false	☐
Interests	Multi Select List	picklist.pax.interests.items	false	☐
Training Certifications	Multi Select List	picklist.pax.certifications.items	false	☐

Add a(n) Boolean Characteristic Go Remove Selected

2. To add a characteristic, first select a characteristic type from the drop-down list, such as Boolean, Date, or Decimal.



3. Click GO. The Platform displays the *Add Employer* page.
4. Enter the values for the characteristic you are defining and click SAVE.

See Also

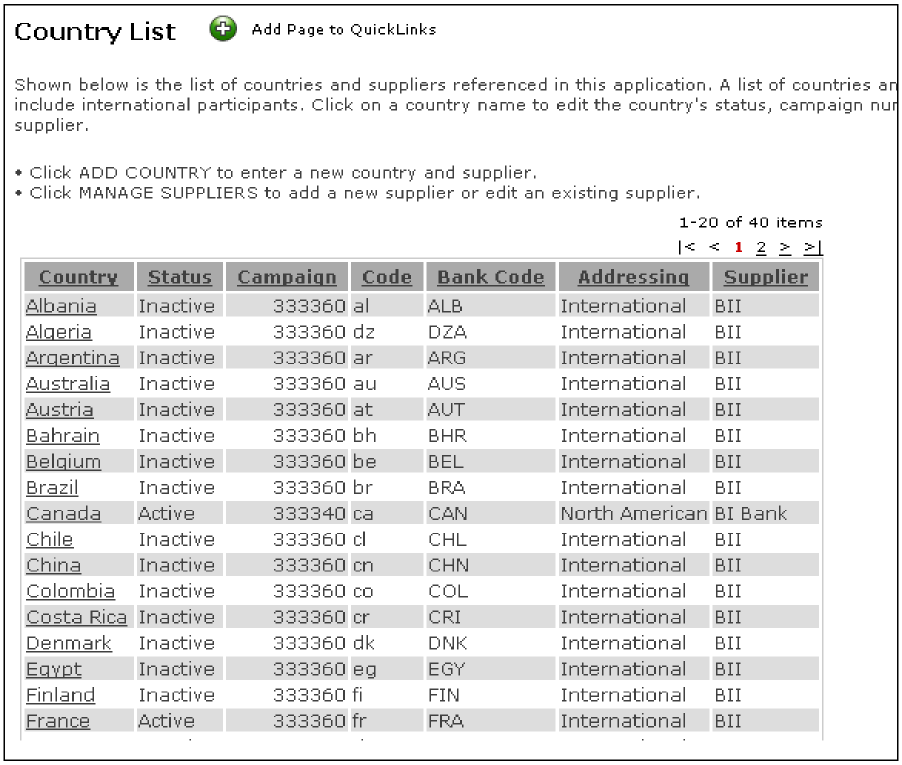
- Participant Characteristics on page 150.
- For additional information about characteristic types (Boolean, Date, Integer, etc.), refer to Table 60 – Form elements on page 138.

Setting Up Countries and Suppliers

Setting up a list of countries and suppliers is required for promotions that include international participants and suppliers, which can be easily activated or deactivated when needed.

To add countries and suppliers:

1. Click on the System tab and select Countries and Suppliers. The Platform displays a listing of current countries and suppliers used by the Platform.



Country	Status	Campaign	Code	Bank Code	Addressing	Supplier
Albania	Inactive	333360	al	ALB	International	BII
Algeria	Inactive	333360	dz	DZA	International	BII
Argentina	Inactive	333360	ar	ARG	International	BII
Australia	Inactive	333360	au	AUS	International	BII
Austria	Inactive	333360	at	AUT	International	BII
Bahrain	Inactive	333360	bh	BHR	International	BII
Belgium	Inactive	333360	be	BEL	International	BII
Brazil	Inactive	333360	br	BRA	International	BII
Canada	Active	333340	ca	CAN	North American	BI Bank
Chile	Inactive	333360	cl	CHL	International	BII
China	Inactive	333360	cn	CHN	International	BII
Colombia	Inactive	333360	co	COL	International	BII
Costa Rica	Inactive	333360	cr	CRI	International	BII
Denmark	Inactive	333360	dk	DNK	International	BII
Egypt	Inactive	333360	eg	EGY	International	BII
Finland	Inactive	333360	fi	FIN	International	BII
France	Active	333360	fr	FRA	International	BII

2. To add a country and its supplier, click ADD COUNTRY. The Platform displays the *Add Country* page.
3. Complete the required information including the Name, Status, ISO Code, Bank Code, Addressing, and Supplier. If the Supplier is not listed, you will need to add the supplier by returning to the previous page and clicking Manage Suppliers.
4. When finished, click SAVE.

See Also

- Countries and Suppliers on page 125

Editing System Variables

System variables are pre-defined attributes that control what features and elements of the Platform are available and functional. System variables, set up during the system definition phase, are used to customize an application for the client. For example, you can enter the email address for the system variable (contact.us.email) used for the Contact Us menu item that appears on the Help tab. You can also turn on or turn off certain features, such as news items, welcome messages, and ads that appear in the left or right rail of the Home page.

To edit a system variable:

1. Click on the System tab and select System Variables. The Platform displays the *System Variable List*.

System Variable List Add to QuickLinks

Variable Name	Variable Group	Variable Type	Variable Value
boolean.include.balance	user info	Boolean	true
contact.us.email	Contact Us Email	String	liu@biworldwide.com
home.user.include.my_activity	Include My Activity	Boolean	true
home.user.include.welcome	Include Welcome	Boolean	true
home.user.include.news_clips	Include News	Boolean	true
home.include.my_activity	Include My Activity	Boolean	true
home.include.my_goal	Include My Goal	Boolean	true
home.include.left_ad	Include Left Ad	Boolean	true
home.include.rankings	Include Rankings	Boolean	true
home.include.whats_hot	Include Whats Hot	Boolean	false
home.include.polls	Include Polls	Boolean	true

The *System Variable List* identifies all the variables that you can use for customization. Review each of the variables listed in Table 2 – System Variables on page 32 and make the necessary changes to the default values.

2. To edit a variable, click a Variable Name from the list. For example, click contact.us.email. The program displays the *Edit System Variable* page.
3. Enter a new Variable Value in the text box.
4. When finished, click SAVE and return to the list of variables.

NOTE: To add a new system variable, contact your Development Team. Once a variable is programmed, you can edit the new variable.

Table 2 – System Variables

Variable Name	Variable Group	Default Value
1. Activate or deactivate the following promotion modules by changing the variable's value to True or False.		
install.productclaims	Product Claims Installed?	True
install.recognition	Recognition Installed?	True
install.quizzes	Quizzes Installed?	True
install.nominations	Nominations Installed?	False
install.newhire	New Hire Referrals Installed?	False
install.ideas	Ideas Installed?	False
install.sixsigma	Six Sigma Installed?	False
2. Enter the administrator's email address who will receive emails from participants when they click Contact Us from the navigation tab.		
contact.us.email	Contact Us Email	liu@biworldwide.com
3. If necessary, edit the following password variables.		
lockout.failure.count	Auth Failure Count For Lockout	4
password.min.length	Password Min Length	8
password.should.use.regex	Password Use Regex?	True
password.not.match.regex	Password Not Match Regex	[a-z]+|[A-Z]+|[0-9]+|\p{Punct}+ (any upper/lower case alpha or numeric and any punctuation is allowed)
password.can.reuse	Can Reuse Password?	False
password.expired.period	Password Expired Period (ms)	6307200000
password.force.reset	Force Password Reset For Pax	True
4. Change the launch date and indicate if AwardBanQ and Shopping Link are used.		
client.launch.date	Client Launch Date	2005-01-01
awardbanq.used	Is AwardBanQ used?	True
shopping.link.used	Shopping Link Used	True
5. Enter the client's name.		
client.name	Client Name	Green is Good
6. Set the following values for participants.		
participant.allow.contacts	Allow Contacts?	True
participant.allow.estatements	Allow estatements?	True
participant.allow.textmessages	Allow Text Messages?	False
proxy.pax.search.node.restriction	proxy	True
all.users.proxy	proxy	True
email.address.system	System Email Address	system@biperf.com

See Also

- System Variables on page 176 for a complete listing of all variables used.

Setting Up Claim Forms

A claim is an activity or "claim" recorded by a participant that identifies what activity was performed as part of a promotion, resulting in qualification for various AwardperQs.

Claim forms are defined by the promotion/module type they are used in: Recognition, Product Claims, and Quizzes. The `Form Library`, accessed from the `System` tab, enables a user to create, view, and update claim forms.

Creating a claim form is the starting point for setting up a promotion. If your promotion is going to use product claims then you will also need to set up categories and products. Further discussion of this process is described in Setting Up Promotions on page 34.

See Also

- Setting Up Promotions on page 34
- Promotions on page 88
- Promotions (participant) on page 111
- Form Library on page 135
- Product Categories on page 159

Setting Up Promotions

The Platform provides the capability to add, edit, or view promotion programs, and recognizes the following promotion types: Product Claims (1-to-1, Tiered, and Cross-sell), Recognition, and Quizzes.

Prior to setting up your promotions, you must:

1. If product claims are used, set up categories and products.
2. Create a claim form and save the form(s) to a library where they are reused for promotion types.

then you can:

3. Set up the promotion.
4. Generate and publish the promotion.
5. Communicate the promotion to participants.

Step 1—Set up Categories and Products (for Product Claims only)

If you *are not* using product claims in your promotion, skip to Step 2—Create a Claim Form; otherwise continue with #1 below. You have the option of manually loading product claims or performing a file upload to the system. Examples of products include electronics, wallpaper, furniture, food, and so forth.

To set up product categories and products for product claims:

1. First set up a product category by clicking on System and selecting Product Categories. The program displays the *Product Categories* page.
2. Click ADD CATEGORY. The program displays the *Add Categories* page.
3. Enter the Category Name and a brief description.
4. Click SAVE. The *View Category* page appears, which allows you to edit, add a subcategory, view the product list, remove the selected category or return to the category list. If necessary, click Add Subcategory and enter a subcategory and description.
5. Click BACK TO CATEGORY LIST. Edit or remove any of the categories listed.
6. Click on the System tab and select Product Library. The *Product Library* page appears.
7. Complete the required information then click ADD PRODUCT. The *Add Product* page appears. **NOTE**: Item number is optional. For example, you may want to enter an SKU number.
8. Click SAVE. The *View Product* page appears.
9. Add a product characteristic by first selecting the characteristic field type in the Add a(n) drop-down list box then click GO. (For additional information about characteristic field types, refer to the Characteristic field types table on page 150.)

NOTE: File uploading of product claims to a product library is currently not available for product categories.

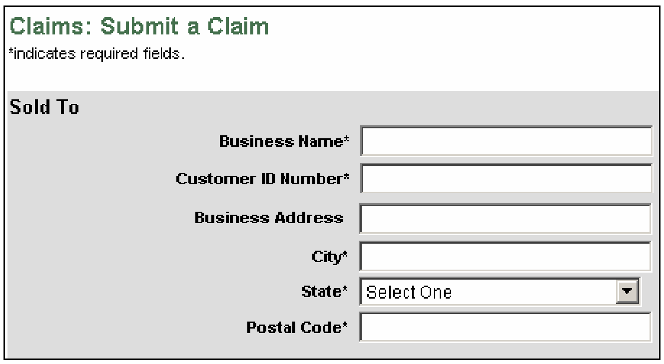
See Also:

- Product Categories on page 159
- Product Library on page 162

Step 2—Create a Claim Form for Submission

Claim forms are used in promotions to collect information during the submittal process. A claim form is completed by the participant to submit an activity that qualifies for a specific promotion. The example below shows a simple claim form.

If claim forms are already set up, skip to Step 3—Set Up the Promotion.



To create a claim form:

1. Click the System tab and select Form Library. The program displays the *Form Library* page. Here you can also view:

   Form Templates –forms used as templates for creating new forms. There are five standard templates included with the Platform.

   Under Construction Forms – incomplete forms that have not been marked as complete and require additional entries.

   Completed Forms – claims forms that are complete, but are not yet used by or assigned to a promotion.

   Assigned Forms – forms that were completed and assigned to a promotion type. The promotion start date may or may not have begun yet.

2. Click ADD NEW FORM. The *Add Form* page appears.
3. Complete the information making sure to select the appropriate promotion (Module) with which the form will be used.
4. Click SAVE. The *View Form* page appears. Here you can also copy a form and use it to create another similar claim form.
5. Click ADD STEP to define an activity. **NOTE**: At least one step must be entered to complete a form. For example: “submit five sales leads a week” might be the first step.
6. Click SAVE. The *View Step* page appears. This page displays a summary of what has been selected and enables you to select the Form Elements or items that you want to

appear on the claim form. A form element is a label that identifies the information to enter or select on a form.

7. Select one or more Form Elements from the drop-down list box and click GO. **NOTE**: to preview a claim form, the first Claim Form Step must have at least one element.
8. Click SAVE. The program displays the *View Step* page showing the elements that you selected. If necessary, make any changes and click Back to Form or Preview Form.
9. Click BACK TO FORM. The *View Form* page appears again, listing the step name and summary information.
10. If finished, click one of the following: BACK TO FORM LIBRARY, MARK AS COMPLETE, or COPY FORM. If you click BACK TO FORM LIBRARY, the form will be added to the list of Under Construction forms.

See Also:

- Form Library on page 135

Step 3—Set Up the Promotion

The Promotion Wizard enables you to set up a promotion and define the promotion type, claim form used, rules, audiences, payouts, approvals, and notifications depending upon the type of promotion selected.

1. Click the Promotions tab and select Add New Promotion. The *Promotion Type* page appears.
2. Select a Promotion Type from the drop-down list.
3. Click START. The *Promotion: Basics* page appears for the type of promotion you selected, and the Wizard highlights the first step in the process.
4. Complete the information required by the Promotion Setup Wizard. If you have additional questions on how to set up a promotion, refer to Promotions in the reference section of this guide.

NOTE: You can also copy an existing promotion and modify it to create a new promotion.

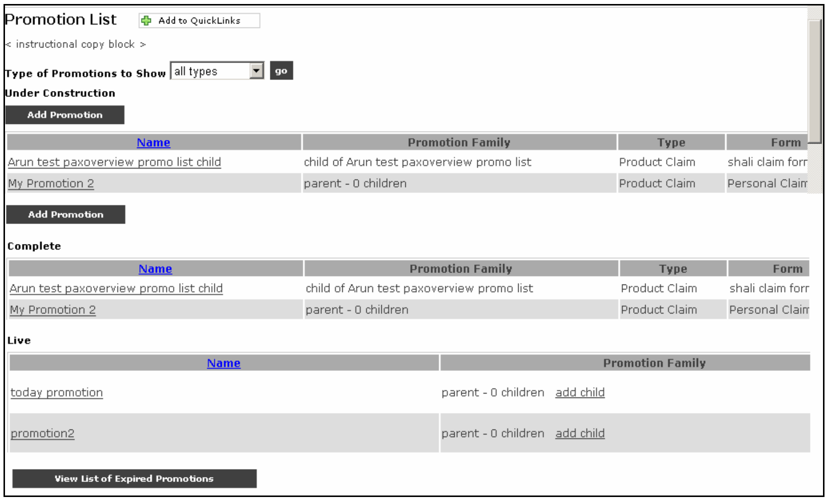
See Also:

- Promotions on page 88

Step 4—Generate and Publish the Promotion

Once your promotion is set up, you can easily generate and publish the promotion by making sure that you:

1. Click the MARK AS COMPLETE button at the end of the promotion wizard.
2. Check the list of promotions by clicking on the Promotions tab and selecting *View Promotions*.
3. Check the list of Completed and Live Promotions (see following example).
4. Check the start promotion date and change it if necessary.



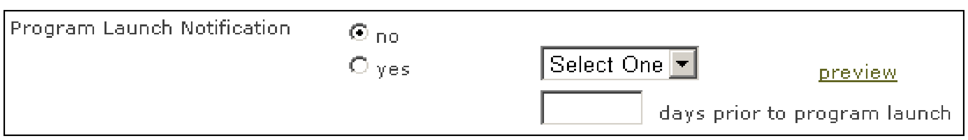
NOTE: **For product claims only**, you can create a child promotion by clicking the add child link next to the Promotion Family name.

Step 5—Communicate the Promotion to Participants

The program is set to go live based on the start date that was set up when you created the promotion.

To check the promotion launch date:

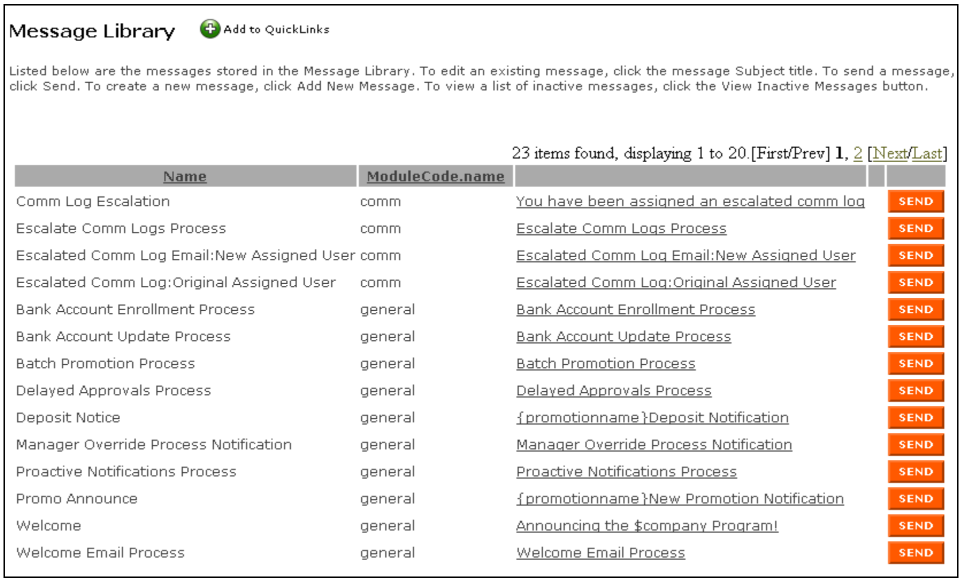
1. Click on the Promotions tab and select View Promotion List.
2. From the Under Construction or Complete list, click the name of the promotion that you want to launch.
3. On the *Promotion Overview* page, click edit from item number 9. Notifications.



4. Check the Program Launch Notification options and enter the days prior to program launch.
5. Click SAVE or CANCEL when finished.

Adding and Editing Messages in the Message Library

The message library contains several messages that are automatically set up when the Platform is installed. These messages are accessed from the Communications tab. The library includes the following messages:



Message Library Add to QuickLinks

Listed below are the messages stored in the Message Library. To edit an existing message, click the message Subject title. To send a message, click Send. To create a new message, click Add New Message. To view a list of inactive messages, click the View Inactive Messages button.

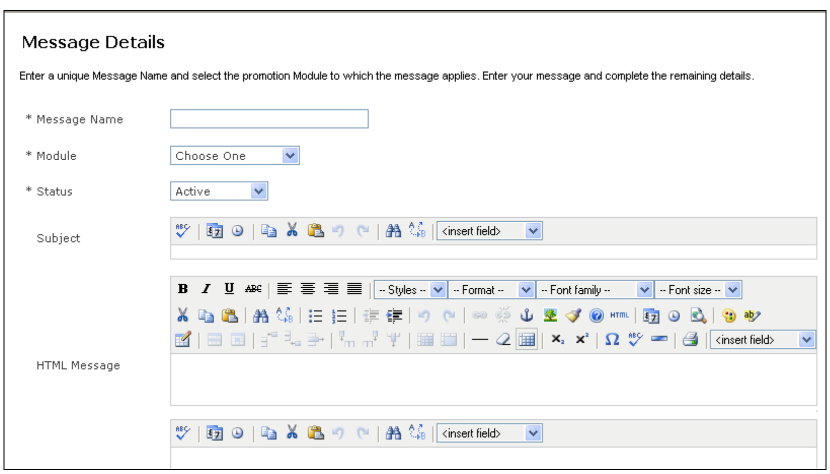
23 items found, displaying 1 to 20.[First/Prev] 1, 2 [Next/Last]

Name	ModuleCode.name		
Comm Log Escalation	comm	You have been assigned an escalated comm log	SEND
Escalate Comm Logs Process	comm	Escalate Comm Logs Process	SEND
Escalated Comm Log Email:New Assigned User	comm	Escalated Comm Log Email:New Assigned User	SEND
Escalated Comm Log:Original Assigned User	comm	Escalated Comm Log:Original Assigned User	SEND
Bank Account Enrollment Process	general	Bank Account Enrollment Process	SEND
Bank Account Update Process	general	Bank Account Update Process	SEND
Batch Promotion Process	general	Batch Promotion Process	SEND
Delayed Approvals Process	general	Delayed Approvals Process	SEND
Deposit Notice	general	{promotionname}Deposit Notification	SEND
Manager Override Process Notification	general	Manager Override Process Notification	SEND
Proactive Notifications Process	general	Proactive Notifications Process	SEND
Promo Announce	general	{promotionname}New Promotion Notification	SEND
Welcome	general	Announcing the $company Program!	SEND
Welcome Email Process	general	Welcome Email Process	SEND

To add or edit a message in the library:

1. Click on the Communications tab and select View Message Library. The Platform displays the *Message Library* page.

2. To add a message, click the ADD A MESSAGE button. To edit a message, click the message subject. The Platform displays the *Message Details* page.



3. Enter or edit the unique Message Name and select the promotion Module to which it applies.

4. Enter or edit the message in the appropriate text box (HTML Message, Plain Text Message, or Text Message.

NOTE: Text Messages are intended for any electronic devices capable of receiving text messages (i.e., cell phone, PDA, etc). You may need to enter or copy the same message in the Text Message text box as in the HTML or Plain Text box.

5. Complete all other information and click Save.
6. When you are ready to send the message, click the SEND button from the *Message Library* page Actions column and indicate who it is going to and when.

Setting Up Your Site Using Content Manager

Content Manager is used to create and update text that appears on the web site. It is accessed by clicking on the System tab and selecting Content Manager. Content Manager enables you to create and publish:

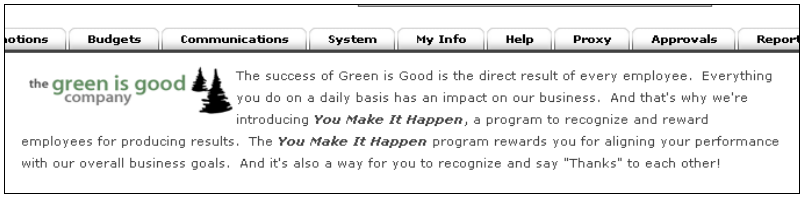
- The Welcome Story – text that first appears on the home page
- Frequently Asked Questions (FAQs)
- Newsletters
- Other web site text:

  You can create web site content by editing existing content. Web content that already has default text and is system generated includes:
  - Error message text
  - Process execution emails
  - File load emails
  - Message Library – includes email text for product claim approvals, recognition sweepstakes, and welcome emails.

For additional information about Content Manager, refer to the *Content Manager User Guide*, version 2.0 published by Object Partners, Inc. Request a copy from your Development Team.

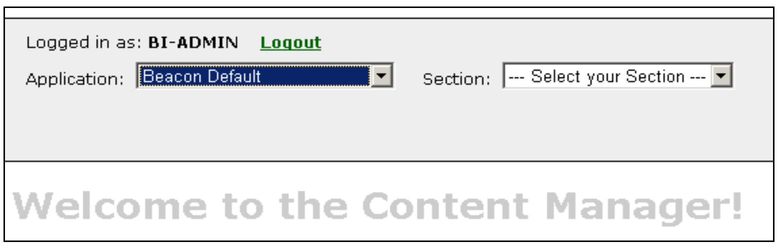
Creating the Welcome Story

The Welcome Story is the text that appears on the participant's home page and probably the first text that a new participant will see and read. An example Welcome Story is shown below and in Appendix B – Example Site Content on page 182. You can assign different welcome stories to specific audiences.



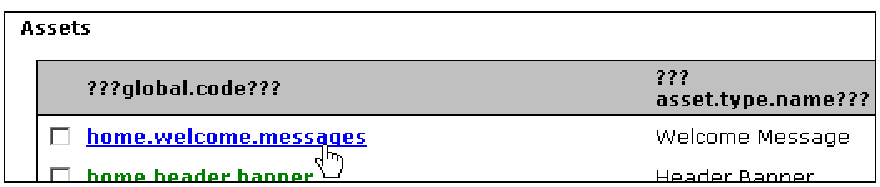
To create a Welcome Story:

1. Click the System tab and select Content Manager. The program displays the *Welcome to the Content Manager* page.

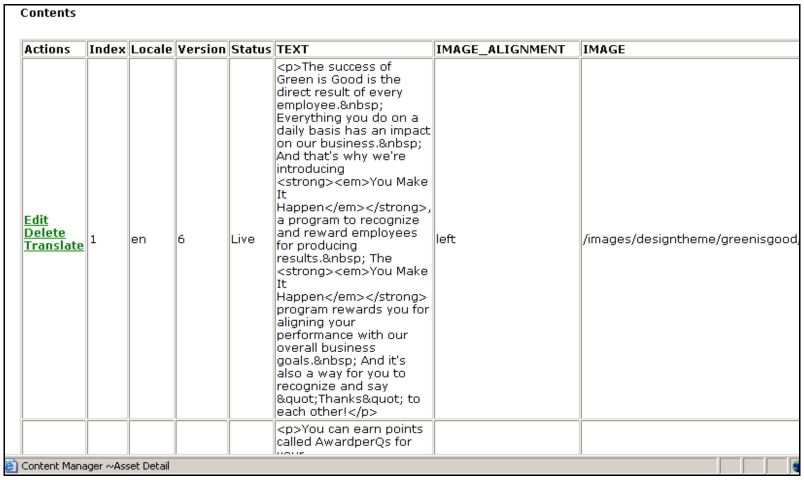


2. Select Beacon Default from the Application drop-down list. After selecting Application, the program automatically displays the sections contained in the Platform. For example, claims, communications log, country data, employer, hierarchy, etc.

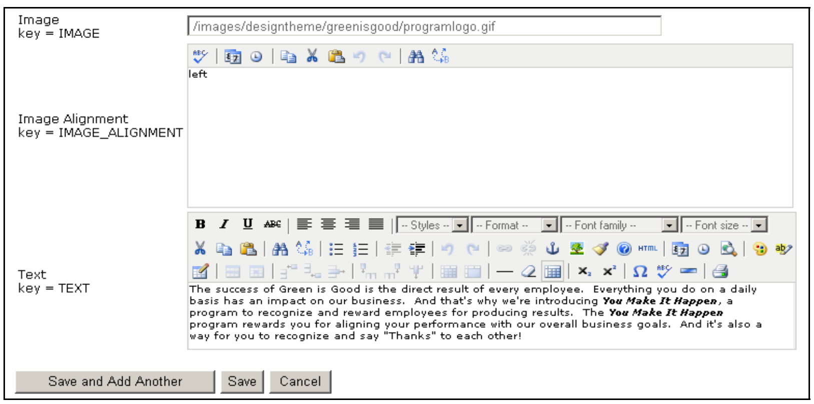
3. To create the Welcome Story, click on home in the first column. Content Manager displays the *Section Detail* page. The *Section Detail* contains the assets. An asset represents a grouping of related pieces of content; in this case, content that is related to or appears on the Home page.



4. Click on home.welcome.messages. Content Manager displays the *Asset Detail* page with the default welcome text shown in the TEXT column.



5. Click Edit to change the default welcome story. Content Manager displays the *Content Detail* page.



Enter text for the Welcome Story in the text box to the right of Text key = TEXT. The text box also displays an HTML editor above it for formatting text. Typically, any time you see the HTML editor above a text box, this indicates a place where you can add or edit text.

6. Click SAVE at the top or bottom of the page.
7. From the *Asset Detail* page, Actions column, click Submit. The program displays Submitted in the Status column.
8. Click SUBMIT. The program displays Submitted in the Status column.
9. Click APPROVE. The program displays Approved in the Status column.
10. Click LAUNCH. The program displays Live in the Status column and the Status of the previous text changes to Expired. The text will appear in the web application.
11. If previous versions of text appear in the table (Expired), click Delete to remove the text.
12. Click SAVE.
13. Click SAVE again or select another Section Detail and Asset to add, edit, or update.
14. Click Cancel from the *Sections* page to return to the Content Manager home page or click LOGOUT and close the Content Manager application.

Additional information to consider:

- More than one Welcome Story is allowed. If more than one welcome story is present for a participant, all of them are displayed.
- There is no maximum character limit to the Welcome Story.
- The page will expand to show the entire story.
- There is a maximum character count before the more link appears below a story.
- The News block moves up to the bottom of the Welcome Story if the story is very short.
- Welcome Stories can contain links to other internal documents, pages, or external locations.
- Welcome Stories can contain images or logos. Enter the image file name (full path name) for Image key = IMAGE in the welcome message content detail page. Also indicate its alignment in Image Alignment key = IMAGE_ALIGNMENT.

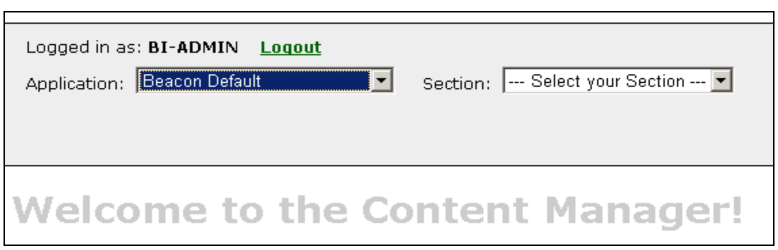
TIP: Can't find what asset contains the text you just added or edited? Click the Content Search link at the top of any Content Manager page then enter the text in the Search String box. Content Manager will list in what asset(s) the text occurs.

Creating FAQs

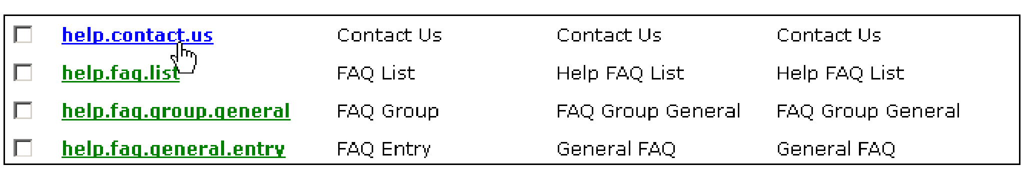
Clicking on FAQs from the Help tab presents a list of Frequently Asked Questions. By clicking on a question the user or participant will go to the text corresponding to the question. The FAQs content is created in Content Manager. All participants see the same FAQs.

To create FAQs:

1. Click the System tab and select Content Manager. The program displays the *Welcome to the Content Manager* page.



2. Select Beacon Default from the Application drop-down list. After selecting Application, the program automatically displays the sections contained in the Platform. For example, claims, communications log, country data, employer, hierarchy, etc.
3. Since FAQs are accessed from the Help tab, click on the help section.



☐	help.contact.us	Contact Us	Contact Us	Contact Us
☐	help.faq.list	FAQ List	Help FAQ List	Help FAQ List
☐	help.faq.group.general	FAQ Group	FAQ Group General	FAQ Group General
☐	help.faq.general.entry	FAQ Entry	General FAQ	General FAQ

4. Content Manager displays the *Section Detail* listing for Help. Click on one of the entry variables: help.contact.us, help.faq.list, help.faq.group.general, or help.faq.general.entry.
5. The *Asset Detail* for the selected FAQ is displayed.

6. In the Actions column, click Edit.

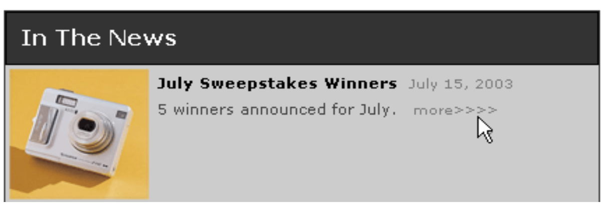
Actions	Index	Locale	Version	Status	QUESTION
Edit Delete Translate	1	en	1	Expired	What are AwardperQs?

Content Manager displays Question and Answer keys, each with an HTML editor available for formatting text.

7. Enter text for the Question (Q) and Answer (A).
8. When finished, click SAVE. The question and answer you entered is shown in the Asset Detail table.
9. In the Actions column, click Submit, then Approve, then Launch. Content Manager changes the Status of the FAQ to Live.
10. Continue adding additional questions and answers until you are finished.
11. From the *Asset Detail* page, click SAVE.
12. From the *Section Detail* page, click SAVE. Content Manager returns to the *Contents* page.
13. If finished, click LOGOUT to end your Content Manager session; otherwise, select another Section (global.code) and add or edit additional content.

Creating Newsletters

Participants can view newsletters by clicking on the more>>>> link from the Home page, as shown below.



Newsletters are a great medium for communicating rankings, winners, special promotions, upcoming events, news about past events (including pictures), and any information that is worth sharing with Participants. Because of the limitation of how much and what can be included in the newsletter page, you may want to consider inserting a link to a PDF.

Creating content for newsletters to appear on the Home page is very similar to entering content for FAQs.

To create newsletter content:

1. Because the Home page is where Newsletters appear, select home from the *Sections* page of Content Manager to add or edit news content.
2. Select home.news from the *Section Detail* page to enter newsletter content.

☐	home.news	News
☐	home.news.more	News More
☐	home.newstitle	News Title

3. Follow the same procedure for adding content as you did for FAQs and Welcome Stories.

NOTE: If you want to add a different News title or "more>>>>" link, edit the home.news.more and home.newstitle assets.

Additional newsletter information to consider:

- Images are allowed in newsletters.
- Images that appear in news should always be 100 x 100 pixels and appear in the same location.
- Newsletters can contain links to other internal documents, pages, PDFs, or external locations.
- The preview text that appears on the Home page allows a certain number of newsletter characters before a more>>>> link is displayed.

- The newsletter title is displayed in bold type along with the date shown next to it.
- There is no limit to the number of newsletter previews; the page will expand to accommodate the number of previews.
- Clicking more>>>> within a preview will take the user to an in-line page. There is a link back to the home page.
- When creating a newsletter, the user is prompted to enter a start and end date for the display of the newsletter.

Creating Web Site Text

You can modify any default text that appears in Content Manager. Any web site text in Content Manager will always have a mini HTML editor displayed above the text box. For example, if necessary, you may want to edit the standard Site Privacy page (Section code: admin; Asset code: admin.privacy), shown below.

Site Privacy Policy

Objectives

Because this site gathers important information from program participants, this Privacy Policy has been created in order to document and communicate a commitment to doing business with the highest ethical standards and as a means to communicate the information gathering and dissemination practices of this site.

By using this site, you are agreeing to the terms of this Privacy Policy. This Privacy Policy is subject to change at any time. If this Privacy Policy is revised, any modifications will only apply to data collected subsequent to its effective date. Your continued use of this site following the posting of changes to these terms will mean that you accept these changes. It is therefore recommended that you periodically review this Privacy Policy for changes that may impact you.

Collected Information – Covert Information Gathering

To improve the usefulness of this site, it MAY track and analyze non-identifying, aggregate usage, and volume statistical information from visitors in order to constantly improve the quality of service and site performance. Information gathered includes items such as: the activity of your browser when you are viewing the site, the site path of your visit, and the time of day you visit the site. Please note that this is not personal information, only general information regarding activity within the site.

Personal Information Gathering

You MAY be required to provide personal information, such as, but not limited to, your name, company name, title, phone number, mailing address, e-mail address, Social Security Number, and credit card information in order to experience the full benefits of this site.

Adding Banner Ads to the Home Page

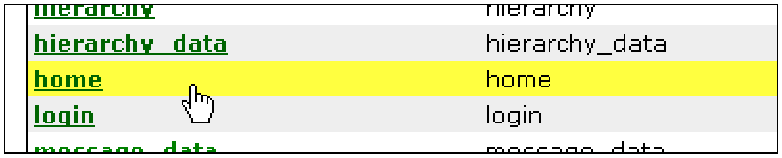
You can add a graphic image (.jpg or .gif) to appear as an ad in the left or right rail of the Home page. The position the ad should occupy within the left or right rail is controlled by the settings selected in Setting Up the Home Page from the System tab, as described on page 49.

NOTE: **Prior to adding a graphic to use as a banner ad, you must contact the Development Team and provide the image file to a member of the Development Team for processing**.

The banner ad image should not exceed a width of 186 pixels in either .jpg or .gif format. There is no limitation for the length of the ad image.

To add one or more banner ads to the home page:

1. Open the Content Manager program from the System tab.
2. Select Beacon Default from the Application drop-down list box. The list of Section Codes appears.



3. Select home from the list.
4. Select home.bannerads.left or home.bannerads.right from the list of Asset codes.
5. From the Actions column, click Edit. (At least one default banner ad exists).

6. In the Image URL key = IMAGE_URL enter the path: images/filename.gif, substituting the file name with the correct graphic file name.
7. If the ad is associated with a link to a URL, enter the URL in the text box.
8. When finished, click SAVE or SAVE AND ADD ANOTHER to add another graphic to the left or right rail.
9. Repeat the previous steps for adding other banner ads to the opposite rail on the home page.

Setting Up Budgets

The Budgets function enables a BI Administrator or higher (including a Client Administrator with budget responsibilities specified at project setup) to create new budgets or view and update existing budgets.

To create a new budget:

1. Click on the Budget tab and select Add New Budget Master. The Platform displays the *Add Budget Master* page.
2. Complete the information as requested. Note the following:
   - With a Budget Master Type of Node, the node owner(s) inherits the budget approval rights.

     IMPORTANT NOTE: You cannot change the budget owner name (Node or Participant). After initial setup, the budget owner name is display only.
   - You can delete a Master Budget if it has not been assigned to a promotion and the promotion has no budget amount assigned to it; otherwise, deletion is not allowed.
   - If a Budget Cap Type is soft and the Budget Master Type of Participant is selected, you must select a participant as an approver.
   - If a Budget Cap Type is soft and the Budget Master Type is Node, the approver is first set to the first node owner (if one exists) or secondly to a Node Manager (if one exists). If not, you must move up one node level at a time until a Node Owner or Node Manager is found.
3. After selecting a participant or node, click *Save*. The Platform displays the *View Budget Master* page.
4. Click ADD BUDGET to select a node or participant and enter the budget amounts. The Platform first displays the *Lookup Node* or Search for Participant page then it will display a page for entering the budget amount.
5. Select a Node Type (i.e., Corporate, Division, Region, Branch, etc.) or participant depending on the Budget Master Type you selected.
6. Click on a node name or participant from the list. The Platform displays the *Add Budget* page.
7. Complete the information requested, including the Amount. Amounts are always stored in U.S. currency.
8. When finished, click SAVE. The Platform displays the *View Budget Master* page where you can verify the data you entered or make additional changes.

NOTE: If necessary, you can export the budget information into a CSV, Excel, or XML file format.

See Also

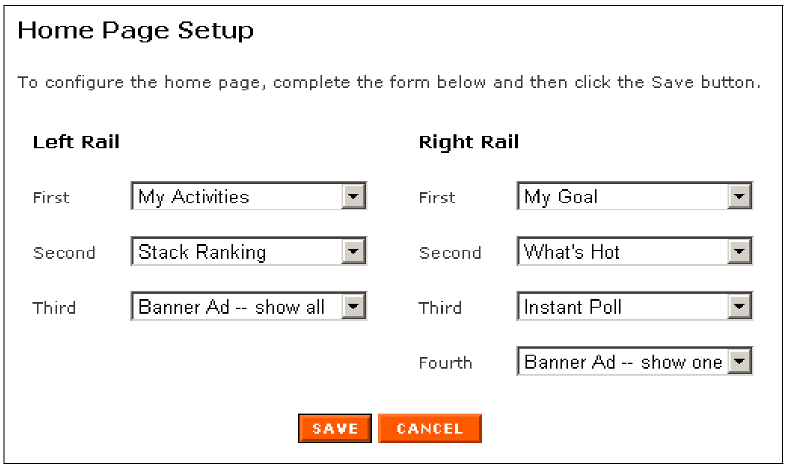
- Budgets on page 61

Setting Up the Home Page

You can decide on what content and the sequence of what is displayed in the left and right rails of the Home page by selecting the Home Page Setup option from the System tab. For example, you may want My Activities to appear in the left rail and My Goal to appear in the right rail, and all banner ads to appear at the bottom of both rails.

To set up the Home page:

1. Click the System tab and select Home Page Setup. The Platform displays the *Home Page Setup* page.



2. Make your First, Second, and Third selections of what you want to display in the Left Rail of the Home page.
3. Make your First, Second, and Third selections of what you want to display in the Right Rail of the Home page.
4. Click SAVE.

See Also

- Home on page 75

SECTION III – MANAGING YOUR SITE

This section of the Administration Guide includes the following topics:

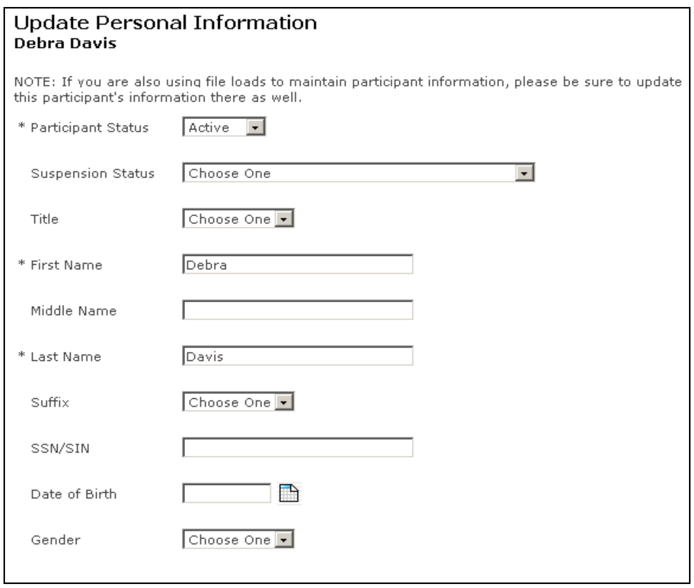
Updating and Inactivating Users and Participants

You can update (add, edit, view, inactivate) participant information using the Participant navigation tab, and update user information by selecting Users from the System tab. To update and inactivate participants and users, refer to the following information.

To inactivate a participant or update personal information:

NOTE: Participants, once they are added to the system, are not removed. However, you can inactivate a participant so that they no longer have access to promotions (as a giver or receiver) and budgets. Inactive participants will still be able to access their personal information (My Info) and will be able to "shop."

1. From the Participant Overview page, click update next to the Personal Information heading. The *Update Personal Information* page appears.



2. Change the Participant Status to Inactive,
   or,
   if necessary, change the participant's Suspension Status to:
   • Suspend no activities for this participant,
   • Suspend all activities for this participant,
   • or Suspend all deposit activities for this participant.
3. Make any other necessary changes then click Save.

To inactivate a user:

4. Inactivating a user is very similar to inactivating a participant. Go to the System tab and select Users then navigate to the *User Overview* page and update the *User Personal Information* page.
5. Make any other changes and click Save.

Managing Promotions

Sweepstakes Processing

Following is a list of items to consider when processing sweepstakes winners:

- The administrator can kick off the calculations for several promotions at once if they wish. However, they cannot run multiple calculations for the same promotion at once (i.e., same promotion but different period). There can only be one pending winners list per promotion, so releasing another calculation will just overwrite the original results. For a given promotion, the administrator must always approve winners to complete the process, before running calculations for another period.
- A zero payout is valid.
- The number of winners can be less than the required winners in the promotion setup.
- The winners have to be active participants.
- The administrator should select the Create winners list link for the promotion for which winners are to be calculated.
- The administrator must enter begin and end dates for the sweepstakes period.
- The program emails the administrator when the process (asynchronous) is completed with a link to the list of winners.

Sweepstakes Approvals

- The administrator has the ability to remove and replace winners as necessary.
- Display first name, middle name, last name, job title/position and department of each winner.
- The administrator has the capability ability to recalculate the winners. (Only for the deleted/removed winners). Participants who are replaced should not appear back in the list again for the current drawing.
- The process award button is disabled if the replace and remove options are selected.
- An error message is shown it the user tries to replace and remove the same winner.
- Once approved, points are deposited to each winner’s accounts in the Bank system and an email is sent to the winner (participant).
- A confirmation page is provided after approval (process award) and an email is sent to the user.
- For modules that use sweepstakes, duplicate winners may be allowed, depending on the setup.

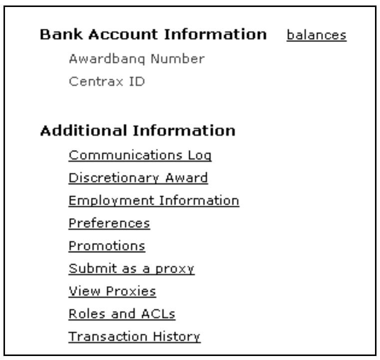
Managing Communications

Communications with participants originates from a variety of sources, including internal email systems, telephone, voice mail, external email, handwritten notes, and the Platform's system generated messages. The Platform enables administrators to record and track all communications about promotions that occur between the participant and user through use of the Communications Log. It is also possible to escalate any critical communications to a user when necessary.

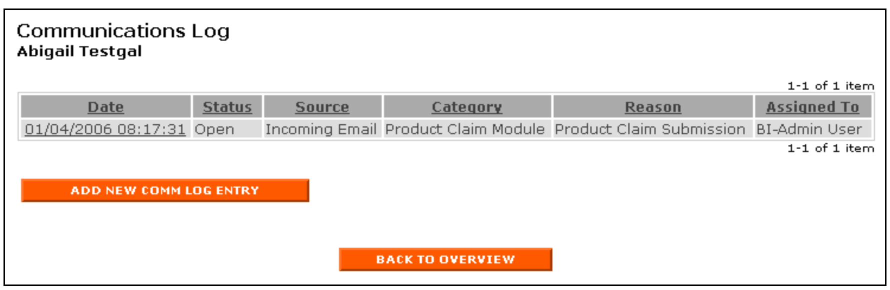
To track and record comments about communications:

1. From the Participant > Search for a Participant or Participant Search box that appears at the top of the home page, access the desired *Participant Overview* page.

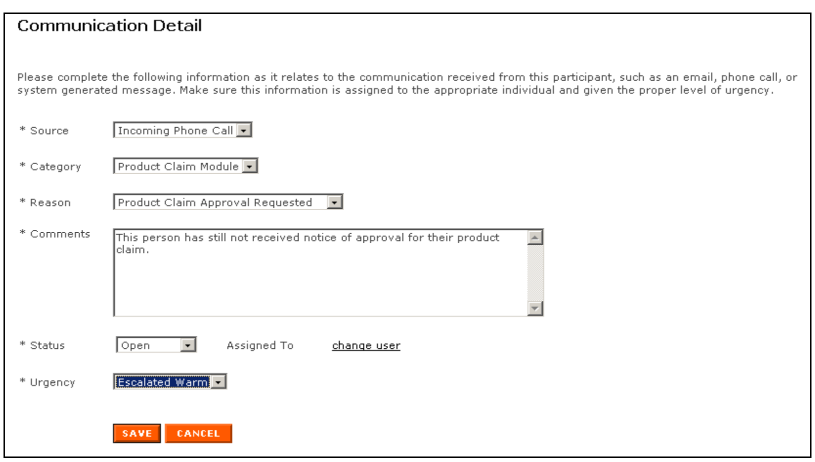
2. Click on the Communications Log link that appears below Additional Information.



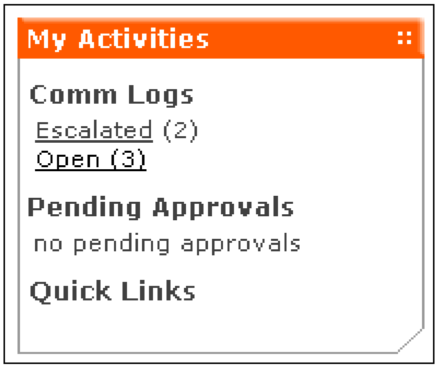
The program displays the *Communications Log* page for the selected participant.



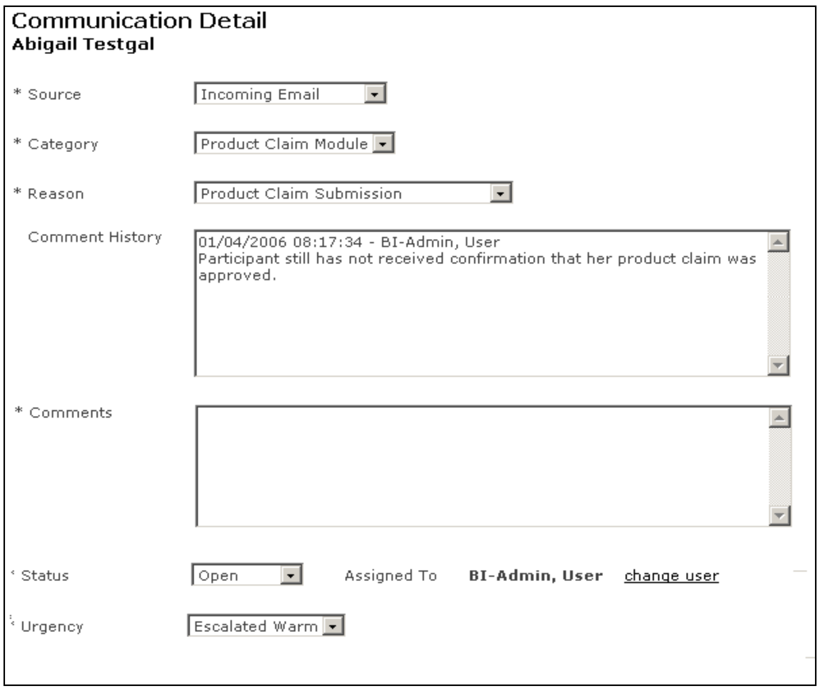
3. Click ADD NEW COMM LOG ENTRY. The program displays the *Communication Detail* page.



From the *Communication Detail* page, complete all the information. Make sure you assign your comments and its urgency to the appropriate administrator. No matter what the urgency flag (escalated, normal, etc.) is set to, a notation will appear on the user's home page in the *My Activities* block. **NOTE**: Only open communications appear in the Comm Logs.



From the *My Activities* block, the assigned administrator can click on the link and go immediately to the *Communication Detail* page for the selected participant.



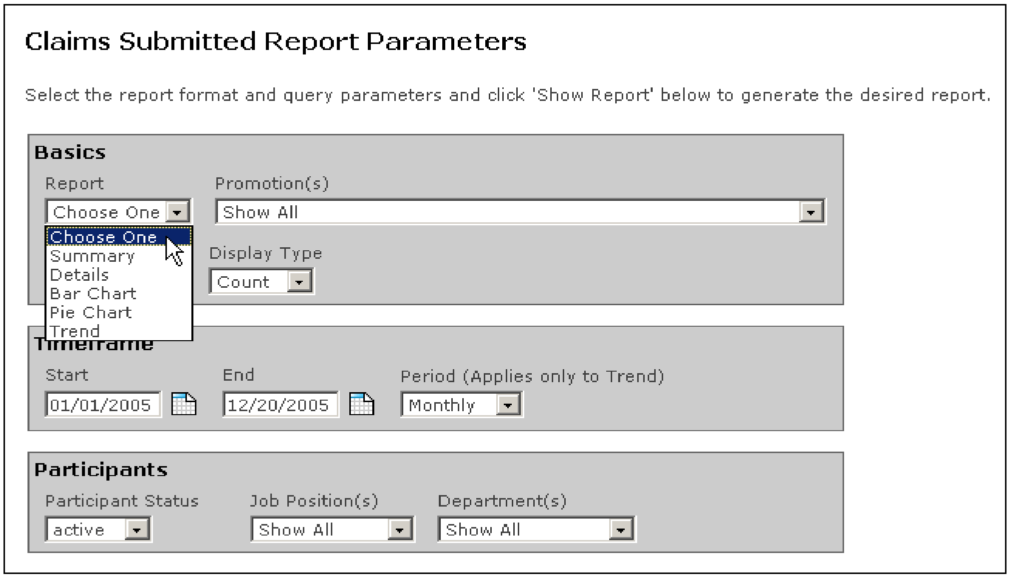
Here the assigned administrator can view a record of the communications including an entire comments history.

If necessary, the assigned administrator can enter additional comments or reassign the communication record to another administrator.

Reporting

Depending on what promotions are active, users can view a variety of useful reports in several different formats, such as summary and detail reports, bar charts, pie charts, and trend analysis.. It's only a matter of selecting the type of report required from the drop-down list box and selecting the desired parameters in order to automatically generate a report.

For example, the report page for *Claims Submitted* enables you to select a Summary report from the drop-down list box, the Promotion, the Display Type (count or percent), the Timeframe, and whether to report on active or inactive Participants, by Job Position, and by Department.



Most of the other report formats use the same parameters. For an example of the different report formats, refer to Appendix C – Report Layouts on page 185.

SECTION IV – REFERENCE

This section includes detailed information for the following topics, which are organized by the navigation tabs that appear on the Platform application.

Approvals

Description: The Approvals tab shows one or more pending approvals for all or selected promotions.

User type: PAX Administrator, User, participant(s) set as an approver

Access:

Budget Overdrafts

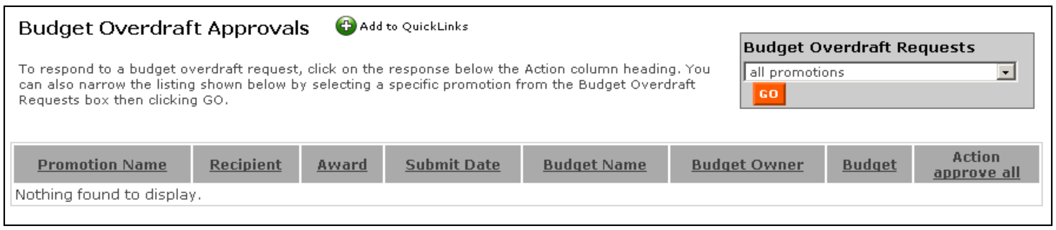


Table 3 – Budget Overdrafts

Field Labels	Description
Budget Overdraft Requests	Select a promotion from the Budget Overdraft Requests dialog then click GO to display a list of approvals. Budget Overdraft Requests can be filtered by all promotions, by a specific promotion, or by promotion status.
Action column heading approve all Deny On Hold Pending	Click the appropriate action listed in the Action column to approve, deny, or put on hold Soft-cap budget overdrafts.

Rules/Considerations

- Only promotions with Soft-cap budgets appear in the Budget Overdraft Requests drop-down list box.
- Approvers will not see the Pending Approvals link in the My Activities box on the Home page unless there are pending approvals.
- The Budget Owner column heading lists a participant(s) or a node.
- The Budget column heading is for the *current* budget.
- Actions include: Approve, Deny, On Hold, or Pending.
- All content within columns can be sorted.
- The status of an approval can remain in a pending state, which will remain on the approver’s list and acted upon at a future date.
- Once the approval status is set to either Approve or Deny, it is removed from the approver’s list.

- If status is set to Deny, then a reason code is requested.
- If the status is updated to Approve or Deny, the system checks the promotion for notification rules.
- If the status is updated to Approve and the promotion is real-time, points are deposited immediately.

Product Claim Approvals

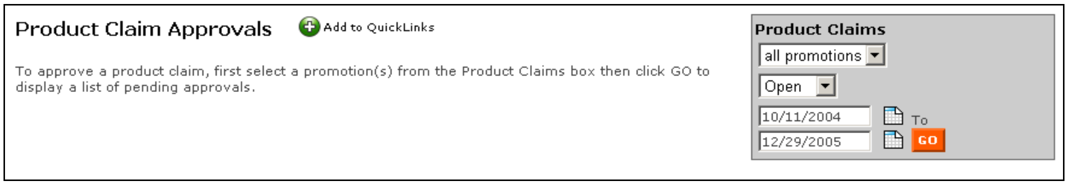


Table 4 – Product Claims Approvals

Field Labels	Description
Product Claims filter dialog All promotions Open/Closed Date from/to	Select a promotion from the drop-down box and complete the other options in the filter dialog box to display a list of pending approvals.

Recognition Approvals

Table 5 – Recognition Approval List

Field Labels	Description
Recognition Claims approval filter dialog	Select a promotion from the drop-down box to display a list of pending approvals.
Date From/to	Enter or select a starting date and an ending date for the desired period of pending recognition approvals.

Rules/Considerations

- The designated approver will see a link in the Home page's left navigation block for Approvals. The block includes a count of the number of transactions to approve by the type of promotion (i.e., Recognition, Product Claims, etc).
- After clicking on the Approvals link from the Home page, the system displays a page listing all recognition transactions requiring approval.
- The Approver can also access the approval pages by clicking on the Approvals navigation tab.
- The Approver can either view outstanding transactions for all promotions or specific promotions.

  - Approvers can choose the status of transactions to view:
    - Pending
    - Hold
  - Approvers can choose to approve transactions via the overview page.
  - The transaction review page includes the following:
    - Receiver Name
    - Giver Name
    - Submit Date
    - AwardperQ amount (if activated in the promotion)
    - If there is more than one recipient, list all and allow approval of each individual item.
    - An APPLY TO ALL button exists that applies the same status to all records, as indicated on the first item of the list.

- If a transaction is denied, the system requests a reason code.
- The Approver can drill down on the receiver name to view the award detail.
- Default Approval Statuses are:
  - Approved
  - Denied
  - On Hold
  - Pending
- Default Reason Codes are:
  - Missing Information
  - Invalid
- If there is also a soft-cap budget overdraft approval needed, the Recognition approval must take place first, then the budget approval.
  - Once the Recognition approval is complete, an email is sent to the soft-cap approver to indicate the recognition is available for approval.
  - The deposit is based on the budget approval.
  - A participant email is not sent until the budget approval is completed.
- If there is no budget, an email is sent to the receiver when the recognition approval and deposit is completed.
- The approver can enter comments on the detail page.
  - Comments are optional.
  - Comments are not included in the participant email or in the participant view of the transaction.
- Once the approval process is complete, the user will receive an email to confirm that the transaction has been approved.

Budgets

Description: The Budgets function enables a BI Administrator or higher (including a Client Administrator with budget responsibilities specified at project setup) to create new budgets or view and update existing budgets.

User type: User, BI or Client Administrator.

Access:

Budget Master List

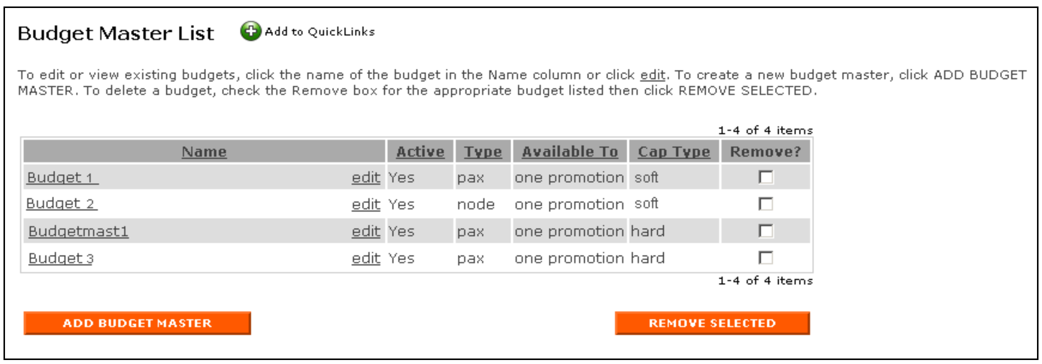
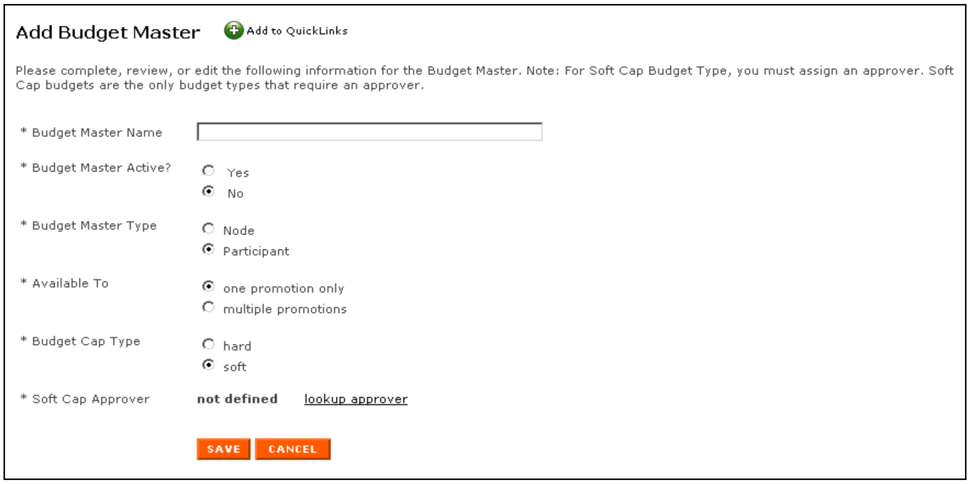


Table 6 – Budget Master List

Field Labels	**Description**
Name of Budget Master edit	Click the budget name to view or edit current budget data, or to add a budget to a budget master. Click edit to update existing budget information, such as name, status, budget type, and cap type.
ADD BUDGET MASTER button	Click to create a new budget.
REMOVE SELECTED button	Check the appropriate Remove? box then click Remove Selected to delete the budget.

Add Budget Master


Add Budget Master Add to QuickLinks

Please complete, review, or edit the following information for the Budget Master. Note: For Soft Cap Budget Type, you must assign an approver. Soft Cap budgets are the only budget types that require an approver.

* Budget Master Name
* Budget Master Active? Yes No
* Budget Master Type Node Participant
* Available To one promotion only multiple promotions
* Budget Cap Type hard soft
* Soft Cap Approver not defined lookup approver

SAVE CANCEL

Table 7 – Add Budget Master

Field Labels	Description
*Budget Master Name	Enter a name for the master budget you are creating.
*Budget Master Active	Select Yes or No to activate the budget.
*Budget Master Type	Choose whether the budget is based on a node (i.e., North [Region], Midwest [District] or participant.
*Available To	Choose whether the budget pertains to one promotion or multiple promotions.
Budget Cap Type	Select hard or soft budget type. You cannot overdraw a budget that is specified as hard. Soft budgets can be overdrawn but only with approvals. If soft budget is chosen, a Soft Cap Approver must be designated.
Soft Cap Approver	Select an approver for soft cap budgets. Click lookup approver or lookup node depending on what was selected for Budget Master Type.

* Required Fields

View Budget Master

The *View Budget Master* page is displayed after entering all the required general budget data. From this page you can enter actual budget amounts and budget owners.

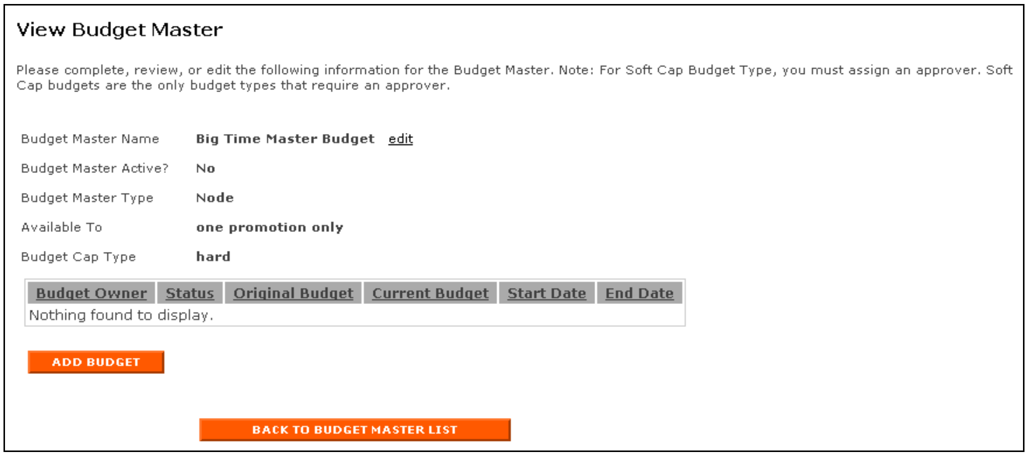


Table 8 – View Budget Master

Field Labels	Description
Budget Master Name edit	Displays the name of the Budget Master. Click edit to make changes to any of the data that is displayed on this page.
ADD BUDGET button	Click to select an owner of the budget and enter the budget amount. The program will first display the *Lookup Node* page in order to choose a node owner or *List Builder* page to choose an owner who is a participant. After selection, the *Add Budget* page appears.

Add Budget

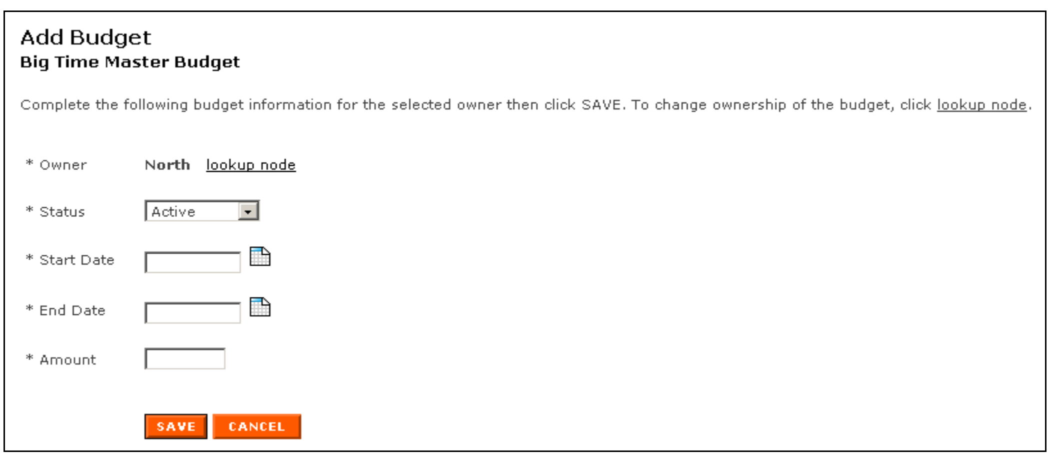


Table 9 – Add Budget

Field Labels	**Description**
Owner	Displays the name of the budget owner. The owner was selected from the previous page (*Lookup Node* or *List Builder*) when you clicked ADD BUDGET.
*Status	Select Active or Inactive.
*Start Date	Enter a starting date for the budget. (Typically this will coincide with the start date of the promotion.)
*End Date	Enter the date the budget ends.
*Amount	Enter the budget amount. Enter the amount in U.S. currency. Decimal points are allowed. Once entered the Amount can only be changed by adding to or subtracting from the total amount.

View Budget Master

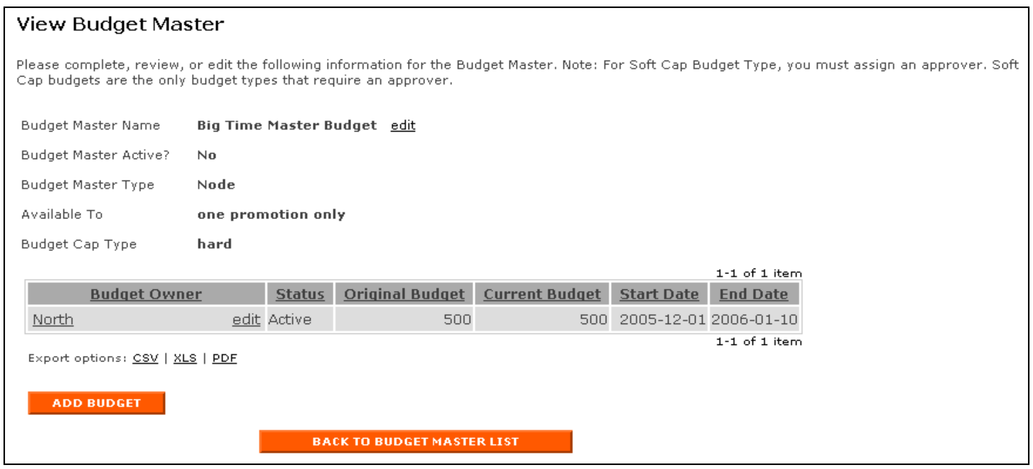


Table 10 – View Budget Master

Field Labels	**Description**
Budget Master Name edit	Displays the name of the budget master. Click edit to change any of the information that is displayed on this page.
Budget Owner's name edit	Click the Budget Owner's name to view the budget information. Click edit to change the budget amount, status, or dates.
ADD BUDGET button	Click to view the amount that is available or to add or subtract from the budget amount.
Export options: CSV | XLS | PDF	Click the export option to export the budget data into a csv, xls, or pdf formatted file. **NOTE**: For CSV and XLS exported files, you must have a spreadsheet program like Microsoft Excel installed on your system, and Adobe Reader or Acrobat installed for PDF file exports. Other data that you can export includes: • Soft-Cap Budget approvals • Employers List • File Loads • Node Participants List • Product Claim History • Recognition History

Edit Budget

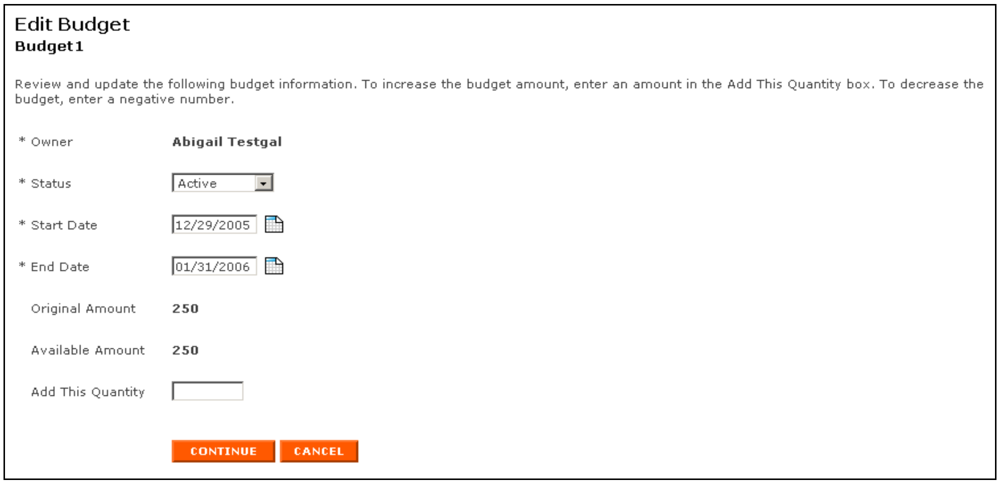


Table 11 – Edit Budget

Field Labels	Description
*Owner	Displays the budget owner's name.
*Status	Select Active, Closed, or Suspended.
*Start Date	Enter a new start date if desired.
*End Date	Enter a new end date if desired.
Original Amount	Displays the original amount budgeted.
Available Amount	Displays the amount remaining after any payouts.
Add This Quantity	Enter an amount to increase or decrease the original budget amount. Negative numbers are allowed, which will result in a subtraction from the original amount.

Rules/Considerations:

- A one-to-many relationship between budgets and promotions can exist, thus the capability for multi-promotional budgets.
- An individual or a node can only have one multi-promotional budget assigned to it.
- With node budgets, the node owner(s) inherits the budget approval rights.
- Ownership (PAX Administrator or node) of a budget is set at the Master level. The individual PAX Administrator or node is set at the individual budget level.
- The existing Promotions drop-down list box should only contain promotions that require or have budgets. Promotions that *do not* use a budget, as indicated when a promotion is created, is not included in the drop-down list box.
- Negative budget amounts are valid entries. They are allowed so that a user can reduce a budget amount.
- Negative balances are allowed.
- When adding a new budget, the system will go directly to the lookup PAX Administrator or lookup node page and then to the *Add/Edit Budget* page.
- If modifying an existing budget, the list should only show current budget owners.

- You cannot change the budget owner name. After initial creation, the budget owner name is display only.
- A history is maintained anytime a budget amount is changed or updated, or if an owner status changes.
- Amounts are always stored in U.S. currency.
- You can delete a Master budget if it has not been assigned to a promotion and if there are no budgets assigned to it; otherwise, deletion is not allowed. You can only delete at the Master level, not at the budget (owner) level.
- A view of Master budgets defaults to active budgets only. A link to display Active and Inactive budgets will be available.
- If a Budget Cap type is Soft, then you must collect an Approver for PAX type budgets. If you are using a Node type budget, then the approver is set to Node Owner 1^{st} (if it exists), or Node Manager 2^{nd} (if it exists) or you must go up one node level at a time until you find either a Node Owner or Node Manager.

NOTE: When a non-product promotion changes to a status of expired and the budget associated with that promotion does not have any non-expired promotions attached to it, then that budget's status will be set to in-active as a part of the promotions rules.

Communications

Description:	The Communications tab enables you to view the message library, send messages, and manage the communications log. Communication logs are created each time there is incoming or outgoing communications with a participant. Communication logs can be viewed and updated by qualified users.
User type:	PAX Administrator, BI Administrator, User
Access:	

View Message Library

The View Message Library menu enables you to view, edit, and send messages that are saved in the message library. You can also create your own messages to keep in the library and use as needed.

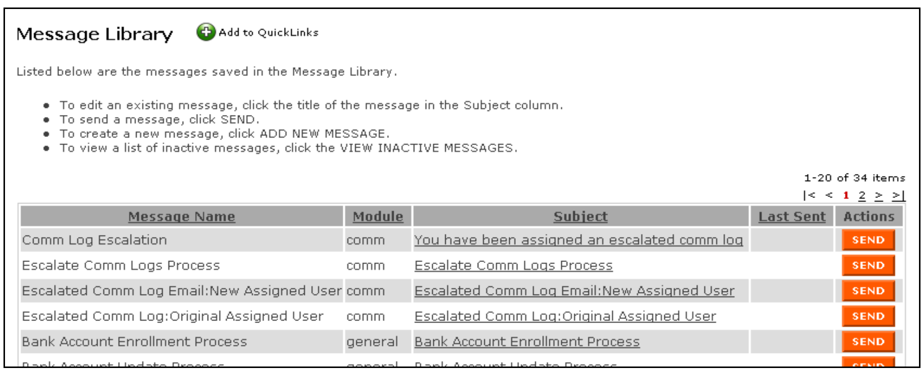


Table 12 – Message Library

Field Labels	Description
Message Name	Lists the name of the message entered in the *Message Details* page. Only active messages are displayed in the list.
Module	Lists to what module the message applies.
Subject	Lists the message subject entered in the *Message Details* page. To edit the message, click the message subject.
Last Sent	Lists the date the message was last sent.
Actions	Lists what action needs to be taken for the selected message; for example, Send.
ADD NEW MESSAGE button	Click to add a new message and display the *Message Details* page.
VIEW INACTIVE MESSAGES button	Click to view inactive messages.

NOTE 1: You can have some messages in the library (promotion start, end, inactivity) scheduled for automatic delivery when the promotion is set up. Likewise, email and text messages can be turned off by promotion.

NOTE 2: Messages cannot be deleted from the message library, only made inactive.

Message Details

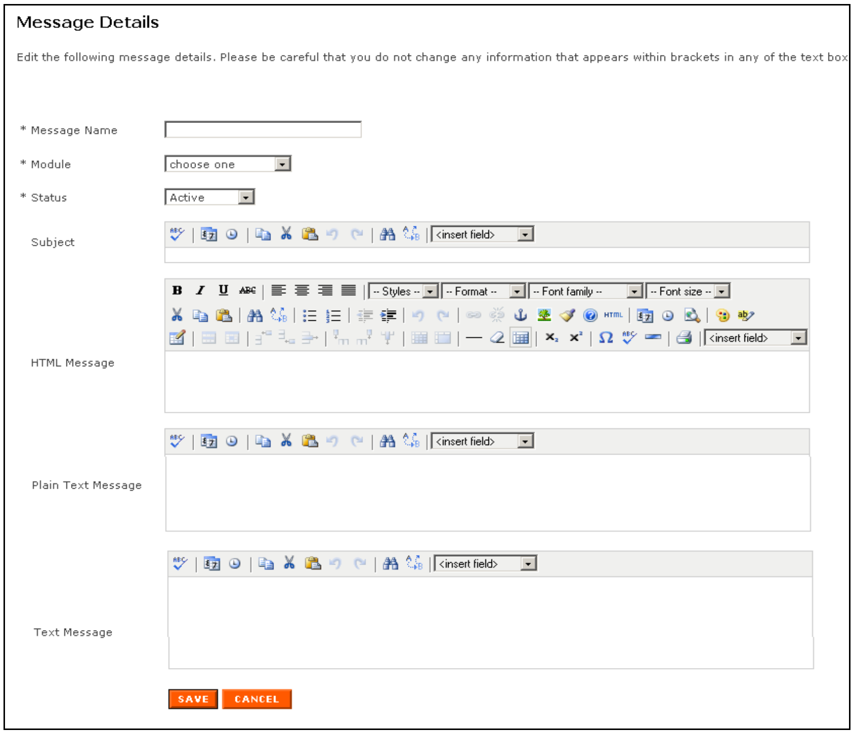


Table 13 – Message Details

Field Labels	Description
*Message Name	Enter a *unique* message name. (Name is case insensitive.)
*Module	Select the module the message applies to in the drop-down list box.
*Status	Select if you want the message to be Active or Inactive.
Subject	Enter a subject.
HTML Message, Plain Text Message, Text Message	Enter a message in the appropriate box. Messages are limited to 100 characters. HTML – use this box to format text using the HTML editor. Plain Text Message – use this box for plain text. Text Message – use this box for messages sent to electronic devices capable of receiving text messages (i.e., cell phone, pda, etc).

* Required Fields

Send an Ad Hoc Message

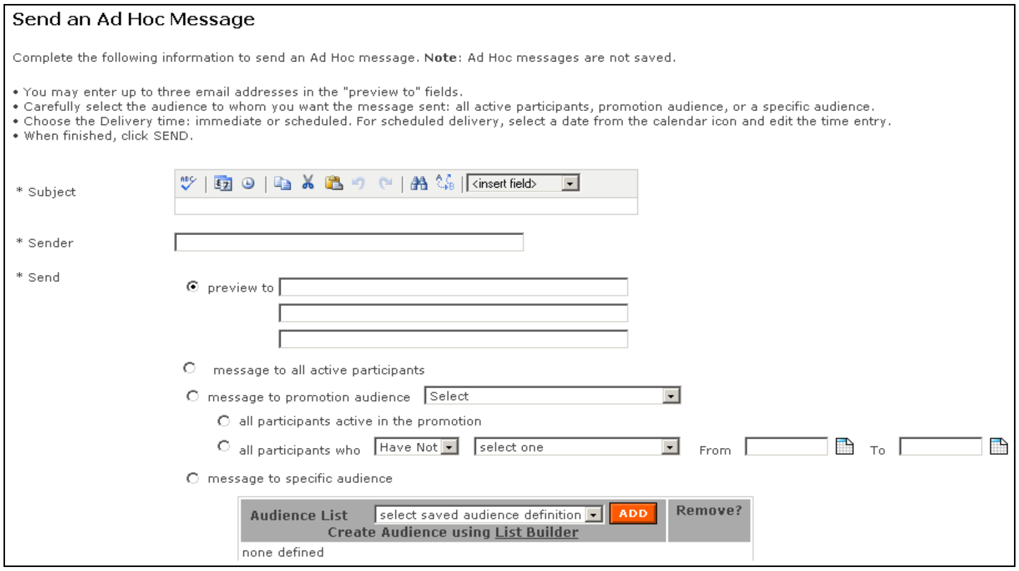


Table 14 – Send a Message

Field Labels	Description
Name	Displays the name of the selected message.
Module	Displays the name of the module for which the message was intended.
Subject	Displays the subject title of the message.
*Sender	Enter your email address.
*Send	Complete one of the following options:
preview to	Enter up to three email addresses to whom you want a message preview sent.
message to program participants	Click this option to send this message to program participants: • all program participants • all participants who have/have not • Select One option from the drop-down list
Message to promotion audience	Click this option to send this message to a specific promotion audience: • all participants active in the promotion • all participants who Have/Have Not • Select One option from the drop-down list
Message to specific audience	Click this option to send this message to a specific audience: • Select an audience that was already saved from the drop-down list then click ADD. • Create your own list of participants by clicking List Builder. (For more information refer to Add Audience on page 92.
Exclude previous recipients of this message	Check this option if you don't want to include recipients who received this message before.

Field Labels	Description
*Delivery	Choose immediate or scheduled then enter a date.
SEND button	Click this button to send this message to the intended audience.

* Required Fields

Send Ad Hoc Message

An Ad Hoc message is similar to sending a message from the Message Library, except that the message is not saved.

NOTE: **If you click Cancel on the *Ad Hoc* message page, all message information is lost. Remember to click Send when you are finished entering the message!**

Manage Communications Log

The communications log (Comm log) relates only to the participant—what is sent to and received from a participant. The Comm log link appears on the participant's Home page.

Rules/Considerations – Communication Logs

- When a system generated comm log is created the following are required fields:
  - Participant ID
  - Initiated date and time
  - Status (open, closed, and escalated)
  - Message
  - Source
  - Category
  - Reason

Rules/Considerations – General Messages

Four system generated emails to defined audiences include:

- Promotions
  - Emails announcing the start of a new promotion, or when a new participant becomes eligible in an existing promotion.
  - Automatic capture of the Message Send Date, which cannot be prior to the Promotion Start Date.
  - Promotion reminders.
- Budget References
  - Only budget owners receive budget emails.
  - Recognition module budget announcements.
  - Emails that *do not* include budget amounts.
- Non-activity Messages
  - Trigger emails sent for non-activity, which depends on the non-activity limit set from the drop-down list (30, 60, 90 days). (This is set in Content Manager.)
- Program ending messages
  - Emails sent (x) number of days prior to a promotion end-date.

Five system generated text messages to defined audiences include:

- Promotions
  - Text messages announcing the start of a new promotion, or when a new participant becomes eligible in an existing promotion.
  - Automatic capture of the Message Send Date, which cannot be prior to the Promotion Start Date.
  - Promotion reminders.
- Budget References
  - Only budget owners receive budget messages.
  - Recognition module budget announcements.
  - Messages that *do not* include budget amounts.
- Non-activity Messages
  - Trigger messages sent for non-activity, which depends on the non-activity limit set from the drop-down list (30, 60, 90 days). (This is set in Content Manager.)
- Program ending messages
  - Emails are sent (x) number of days prior to a promotion end-date.

Deposit notifications

- If the Message Name is not unique, an appropriate error message is displayed.
- Receipt of email or text messages is contingent upon the participant selecting that option from their preferences page.
- Email and text messages are spell checked.
- System generated emails and text messages cannot be sent prior to the launch of Welcome emails.
- The program supports 35 existing system generated emails.
- Subject and text messages cannot contain HTML code.
- Any time an email or text message is sent—an ad hoc or scheduled-system generated message—a communications or Comm Log is created. All modules share a common Comm Log per participant.

Help

Description: From the Help tab you can view system documentation, contact technical support, view FAQs, and view what version of the program you are using.

User type: PAX Administrator, BI Administrator, User

Access:

System Documentation

This guide is also available online in Adobe's PDF format, which utilizes a number of navigation aids. Bookmarks are set up so you can easily and quickly go to a different section or topic within the guide. In addition, any text that is underlined and shown in blue is a hyperlink that, when clicked, will take you immediately to that topic. To view this guide in PDF format, click the Help tab and select Documentation.

Contact Support

To send a message, comment, or question to the technical support mailbox, select Contact Support from the Help tab.

Version Information

Selecting Version Information from the Help tab displays the current version of software you are using. Occasionally you may need to know the version number when communicating with the Development Team, team members, or product subject matter experts.

NOTE: PAX Administrators will also see the FAQs option available from the Help tab.

Help (participant)

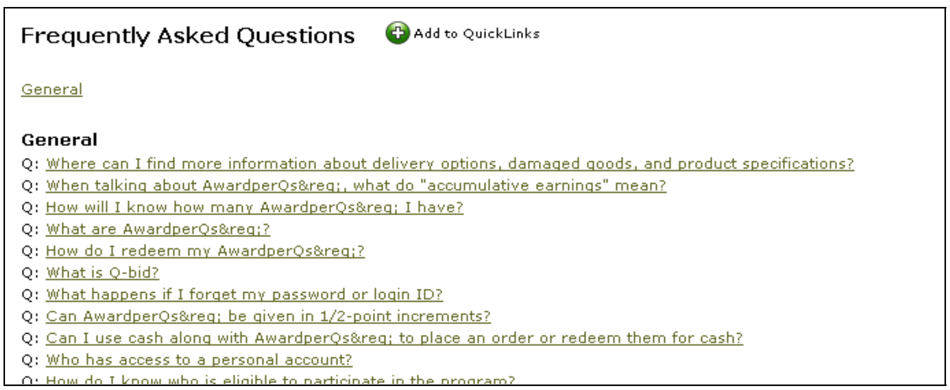
Description: From the Help tab the participant can view Frequently Asked Questions and contact program support.

User type: Participant

Access:

Frequently Asked Questions (FAQs)

Clicking on FAQs from the Help tab presents a list of Frequently Asked Questions. By clicking on a question the user or participant will go to the text corresponding to the question. The FAQs content is created in Content Manager.



Rules/Considerations – FAQs

- FAQs must link to text.
- Navigation aids are provided to allow the user or participant to jump back to the top of the FAQs table of contents.
- The information is view only.
- The sort order is managed by Content Manager.
- All audiences will see the same FAQs.

Contact Us

To send a message, comment, or question to the program support mailbox, select Contact Us from the Help tab.

Rules/Considerations – Contact Us

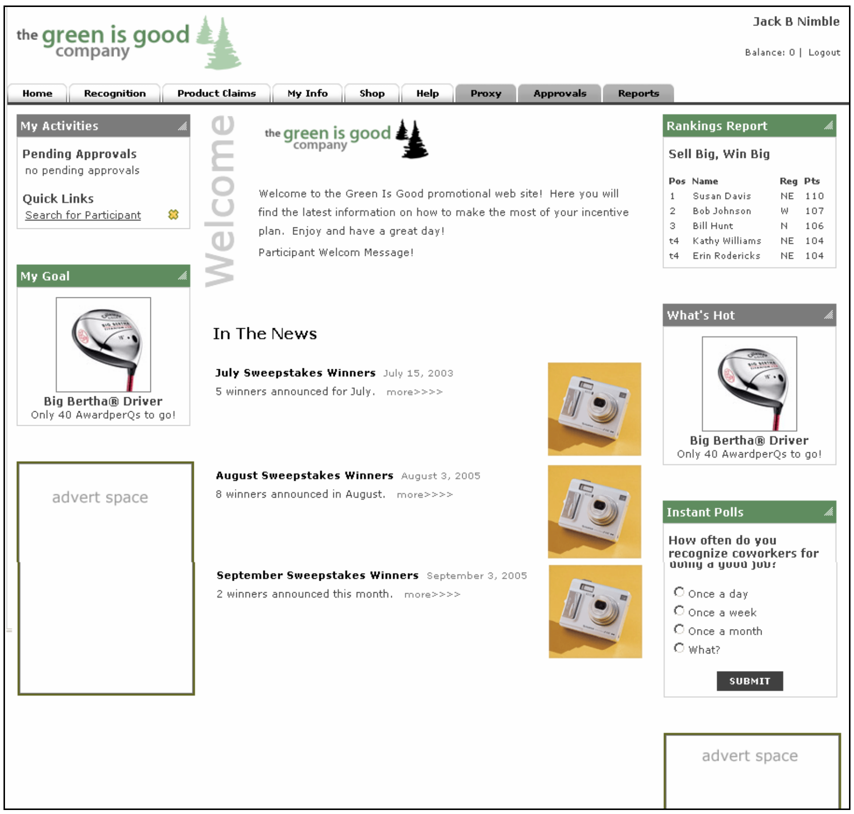
- The Email Address field is filled in with the submitter's email address; however, the submitter can change the email address if needed.
- The email is sent to a primary administrator's email address, which will be a system variable defined during system configuration and program installation. (System>System Variables>contact.us.email.)
- A valid email must be entered. All email addresses requested should follow the format address@domain.ext. The system checks for:
  - no spaces within the address.
  - one and only one @ symbol.
  - some text that precedes the @ symbol.
  - some text that follows the @ symbol.
  - a period and an extension (i.e., .com, .org, etc.,) at the end of the address, in the .xxx format.

Home

Description: The Home page is view only and has no entry fields. What is included on the Home page depends on the type of user or participant.

User type: PAX Administrator, BI Administrator, User, participant

Access:



The Home page is divided into the following areas and elements:

❶ Page header – includes the company, promotion logo or artwork.

❷ Participant Search box – allows users to quickly search for participant and claim information. This is not shown to participants.

❸ Personalization Block – shown in the upper right corner with the following elements: name, bank balance (if greater than zero), and logout option.

❹ Navigation tabs - Access to navigation tabs is based on role assignment.

❺ Left rail – includes optional blocks for My Activities, My Goal, and Banner Ads.

❻ Center rail - The center, top area is always designated as the Welcome Story location. This is required. The center bottom area is the designated location for “In the News”, if this feature is active.

❼ Right rail – includes optional blocks for Rankings, What's Hot, Instant Poll, and Banner Ads.

See Also

- Setting Up the Home Page on page 49
- The Platform – An Overview on page 8

Rules/Considerations

- Each rail is made up of tiles that can be activated and inactivated by project.
- Each tile, if activated, has an assigned order/content:
  - the left rail includes: My Activities, My Goal, and Banner Ads
  - the right rail includes: Rankings, What's Hot, Instant Poll, and Banner Ad
  - if a tile is not activated, the activated tile below it moves up.
  - tiles can be ordered within a rail but cannot be move to a different rail location.
- Standard tabs, regardless of assignment, are: Home, My Info, Shop, and Help. Other optional tabs, based on assignment or role, include: Recognition, Quizzes, Claims, Reports, and Admin.
- The participant sees only those items that are:
  - assigned to their user ID specifically
  - assigned to the hierarchy or segmentation to which the participant belongs
  - assigned to all participants
- The following items displayed on the Home page are dictated by participant assignment or by role: Newsletters, Welcome Story, My Activity, Rankings, Instant Poll, Banner Ads, What's Hot, My Goal, and a Personal Information Block.
- Users see the following items: detailed Participant Search box (including project name and environment) and User navigation.
- The center, top area is always designated as the Welcome Story location.
- The center bottom is the designated location for "In the News", if this feature is active.
- Access to page elements and navigation tabs is based on role assignment.
- Links to the modules display only if the participant has access to a promotion in the module.
- If a second logo is necessary, the administrator will place it within the Welcome Story area using Content Manager.
- There can be no more than five optional navigation module links activated for one given site.
- Participant Search (Search For/By)
  - The user selects item from the Search For drop-down list box (e.g., Participant) and Search By (e.g., Last Name), and then enters a value (e.g., Anders) to perform a search of the database.
  - If multiple records meet the initial search criteria, the function displays a list from which the user can select a record. If the search results in a single result, the search function displays the specific participant detail page.
  - Search values are not case sensitive.

- Client Name and environment is displayed on the top of the search box (i.e. Green is Good Company, Marketing).
- Participant search fields are different from Journal Transaction searches.
- Minimum Search For and By values:
  - Participant: goes to Search Results list or PAX Overview
  - Claim/Transaction: goes to Claim
  - Comm Logs: goes to Comm Log detail (?)(Deferred until M4)
- The asterisk (*) next to a field label indicates required data. It applies only to information that a client elects to collect on their site. This standard may indicate that a field is required but a customer may not choose to collect that information.
- After approximately 20 minutes of inactivity, the Platform will automatically log the user or participant out of the program.

My Info

Description: The My Info tab allows a user to view profile information and to change their password. A participant or PAX Administrator can view account and profile information, change their password, change preferences, and add proxies.

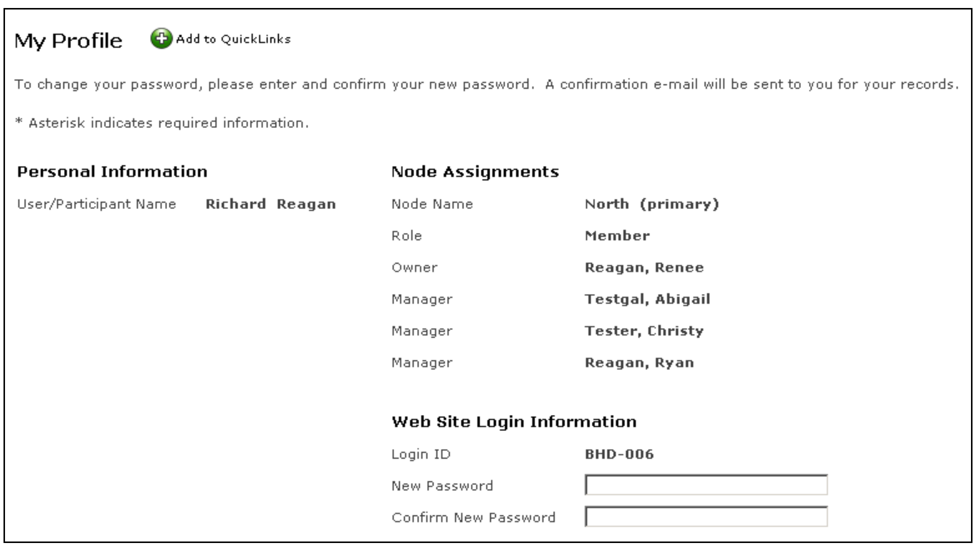
User type: User, PAX Administrator, BI Administrator, Participant

Access:

User Info

Users who are not participants only have the My Profile selection showing under the My Info tab.

My Profile



NOTE: As a standard, fields on the *My Profile* page are not available for participants to edit, as participant information is maintained by client file loads most of the time.

Table 15 – My Profile

Field Labels	Description
Personal Information	This information is view only. Personal information is entered through the Participants>Add New Participant tab by users or PAX Administrators.
Node Assignments	Displays the nodes and roles that are assigned to this participant.

Field Labels	Description
Web Site Login Information	The user can change their password. The password must be between 8 to 75 characters and may contain alphabetic, numeric, and special characters. The password is case insensitive. All characters entered are masked with an asterisk as administrators or users do not have access to the password. Password options are set up with a system variable.

User/Participant Info

A participant and a PAX Administrator have these additional profiles available from the My Info tab: My Account, My Profile, My Preferences, and My Proxies.

My Account

Table 16 – My Account

Field Labels	Description
Summary of AwardperQs Activity	Summarizes a participant's AwardperQs activities: Beginning Balance, Earned this Period, Redeemed this Period, Adjustments this Period, Pending Order, and Ending Balance.
Summary Period	Enter a starting and ending date so you can view only data for that period.
<u>convert certificate</u>	Click this link to convert any certificates into AwardperQs points. The program will request a certificate number after which it will automatically convert it into points. This feature can be turned on or off using a system variable. **NOTE**: A paper certificate will no longer be valid after it is converted. 
Account Transactions	Provides detail transaction information for the Summary of AwardperQs Activity data that appears at the top.

Rules/Considerations

- If a participant enters a date range for which there is no activity, the program will display a message indicating that there is no activity for that period.

- After points are deposited via a certificate conversion, the account statement page update shows the new deposit in real time.

My Profile

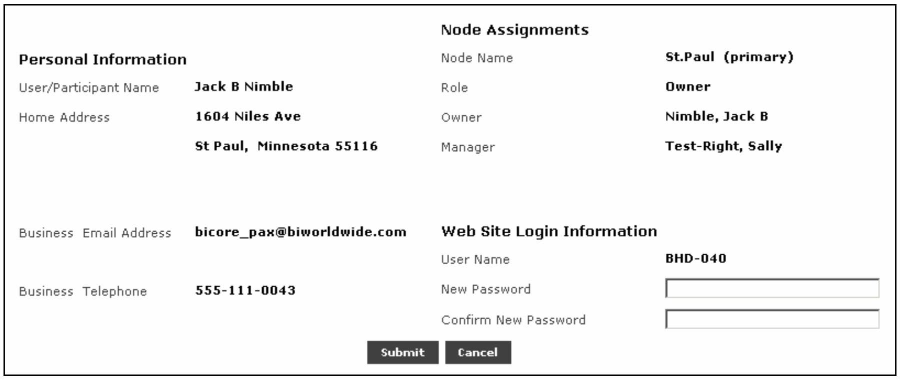


Table 17 My Profile

Field Labels	Description
Personal information	See User Info on page 78.
Node Assignments	Positions or divisions assigned within a hierarchy. For example, ABC Corporation has three nodes: Corporate, Regional, and District. Each of these nodes can have additional nodes and so on. See example below.
NOTE: Only a user can view a hierarchy through a hierarchy link. For additional examples, refer to Example Hierarchies on page 144.	Node Type(s) Region Branch District Corporate Division Zone Node(s) ⊟ Bonfire Uber Corp (Corporate) ⊟ BONFIRE HOME DESIGNS (Division) ⊟ North (Region) ⊟ Midwest (District) ⊟ Minnesota (Zone) St.Paul (Branch) Minneapolis (Branch) Bloomington (Branch) Rochester (Branch) ⊟ Wisconsin (Zone) Eau Claire (Branch) Milwaukee (Branch) Green Bay (Branch) ⊟ Heartland (District) ⊞ Iowa (Zone) ⊞ Kansas (Zone) ⊞ Missouri (Zone) ⊞ South (Region)
Web Site Login Information	See User Info on page 78.

My Preferences

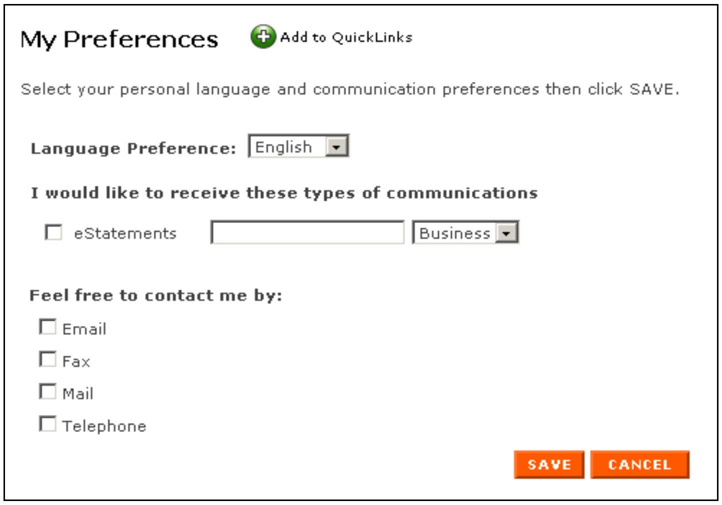


Table 18 – My Preferences

Field Labels	Description
I would like to receive these types of communications:	Check one or more boxes for the types of promotion communications you want to receive. Types of communication might include: eStatements, surveys, emails, and other types of program communications.
Allow Contact By:	Check one or more boxes for how you want to be contacted.

My Proxies

A participant can designate another participant to enter transactions on their behalf.

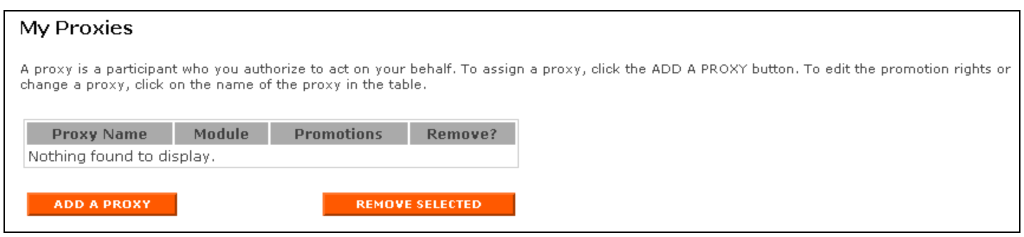


Table 19 – My Proxies

Field Labels	Description
Proxy Name	Click on a proxy name to edit the proxy.
Module	Proxy rights can be assigned at the module or promotion level.
Promotions	Proxy rights can be assigned at the module or promotion level.
Remove?	Check this box to delete the proxy then click Remove Selected.
REMOVE SELECTED button	Check the Remove? box then click this button to delete a proxy.
ADD A PROXY button	Click to add a Proxy and define proxy participants and promotion rights.

Add a Proxy

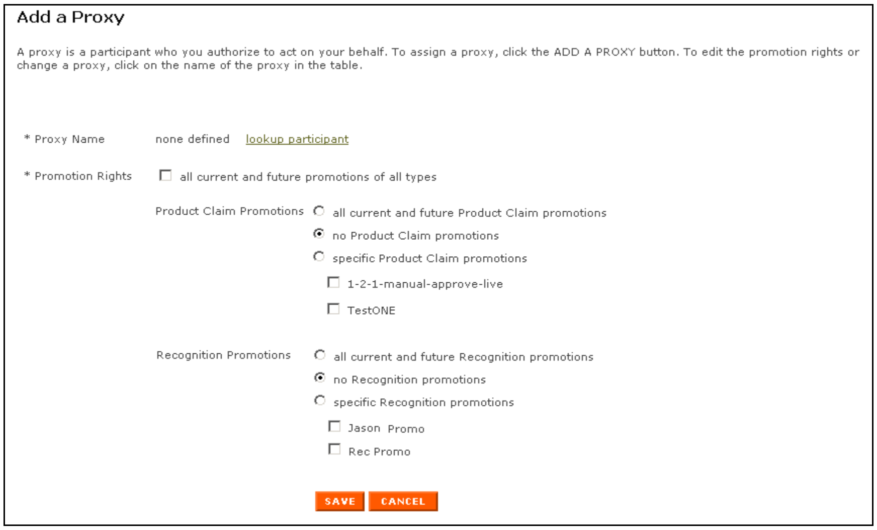


Table 20 – Add a Proxy

Field Labels	Description
Proxy Name	Click lookup participant to select a name to act as a proxy.
Promotion Rights	Check to which promotions (all or a specific promotion) the proxy rights apply.

Rules/Considerations

- Proxy rights apply only to submittal, not to approvals.
- There can be more than one proxy per module or promotion.
- The system will track and report on both the proxy and the participant.

See Also

- Participants on page 83
- Adding Users and Participants on page 21
- Updating and Inactivating Users and Participants on page 52
- Using List Builder on page 92
- Proxy on page 113.
- Creating an audience using List Builder – Audience Definitions on page 120

Participants

Description: A participant takes part in the company's promotion and incentive programs and may be awarded points based on performance, which are redeemable for merchandise or other incentives. A participant has no administration responsibilities. The Participants tab enables a user to search for, add, view, and update a participant profile.

User type: User, PAX Administrator, BI Administrator

Access:

Search for Participant

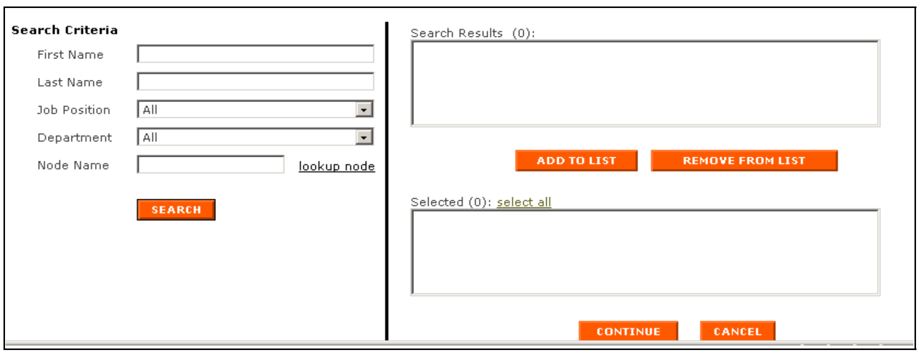
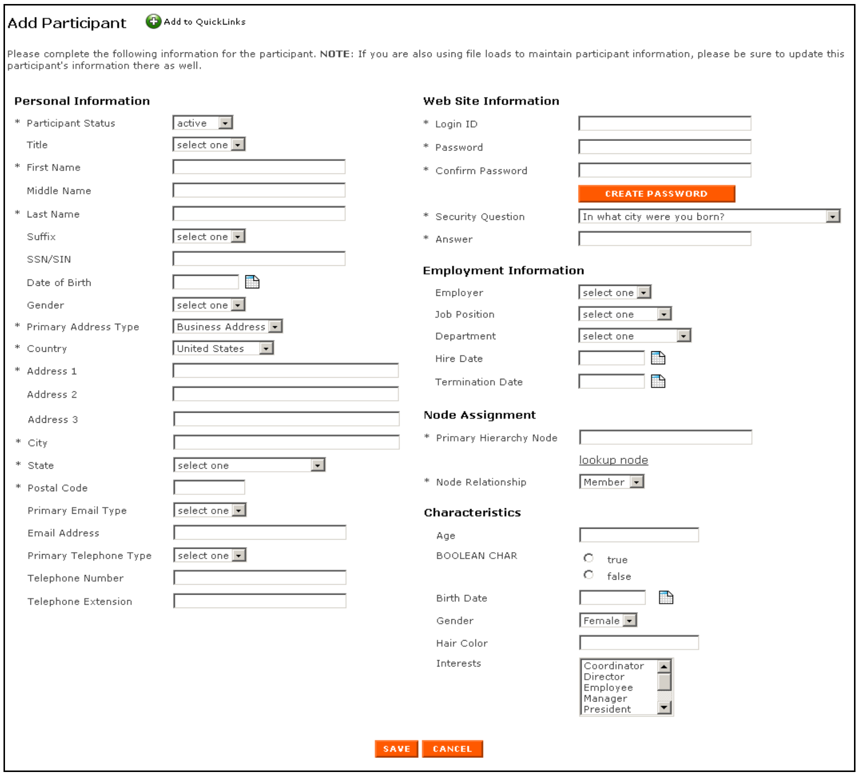


Table 21 – Search for Participant

Field Labels	Description
Search Criteria	Enter one or more parameters as Search Criteria the click SEARCH.
Search Results	Results of the search appear here. Select one or more names then click ADD TO LIST.
Selected	The names chosen in the Search Results box appear here. Click CONTINUE to display a list of participants.

Add New Participant



NOTE: If you are also using file loads to maintain participant information, be sure to update the participant's information in the file load as well.

Prior to adding participants, you must have defined the following:

- Hierarchy
- User roles
- Employer record

Table 22 – Add Participant

Field Labels	Description
Personal Information	
*Participant Status	Choose Active or Inactive.
Title	Choose the appropriate title (Mr., Mrs., Ms., Dr. etc.)
*First Name	Enter the participant's first name.
Middle Name	Enter the participant's middle name.
*Last Name	Enter the participant's last name.
Suffix	Enter the appropriate suffix, such as III, Jr., Sr. etc.
SSN/SIN	The user can enter hyphens and display the data exactly as it is entered. Non-numeric data are stripped out when saving to the database. Numbers are redisplayed without hyphens and all digits are masked with asterisks except the last four digits.
Date of Birth	Enter the participant's date of birth in the format

Field Labels	Description
	mm/dd/yyyy, or click the calendar icon to select a date.
Gender	Choose male or female.
*Primary Address Type	Choose the primary address type (business, home, other, etc.)
*Country	Select the appropriate country.
*Address 1	Enter the participant's address.
Address 2, Address 3	Enter a second and third address, if necessary.
*City	Enter the place of residence.
*State	Enter the resident state.
*Postal Code	Enter the postal code.
Primary Email Address Type	Enter the primary email address type (business, home, etc.)
Email address	Enter the participant's email address.
Primary Telephone Type	Choose the primary telephone type (business, home, fax, mobile, etc.)
Telephone Number	Enter the participant's telephone number.
Telephone Extension	If necessary, enter the participant's telephone extension.
Web Site Information	
*Login ID	Enter a login ID.
*Password	Must be a minimum of eight characters, and is case insensitive.
*Confirm Password	Reenter the password to verify spelling.
CREATE PASSWORD button	Automatically creates a random password, which is masked out.
*Security Question	Select a question in the drop-down list to verify identity if the password is forgotten.
*Answer	Enter the correct answer to the above question.
Employment Information	
Employer	Select the current employer name.
Job Position	Select the current job position.
Department	Select the current department name.
Hire Date	Enter the hire date in the format mm/dd/yyyy or click the calendar icon to select a date.
Termination Date	Enter the termination date if necessary.
Node Assignment	
Primary Hierarchy Node	Enter the primary hierarchy node. If not known, click the lookup node button.
lookup node button	Searches for the Primary Hierarchy Node based on the Node type.
Node relationship	Select the appropriate node relationship (i.e., Member, Owner, Manager)

Field Labels	Description
Characteristics	Characteristics are dependent upon what was defined during the system definition and configuration phase. This will vary by application and can includes characteristics such as assignment, interests, certifications, etc.

* Required Fields

Update Participant

The Update Participant page includes the same elements that were entered in the *Add Participant* page. Additional functions on this page are explained in the following table.

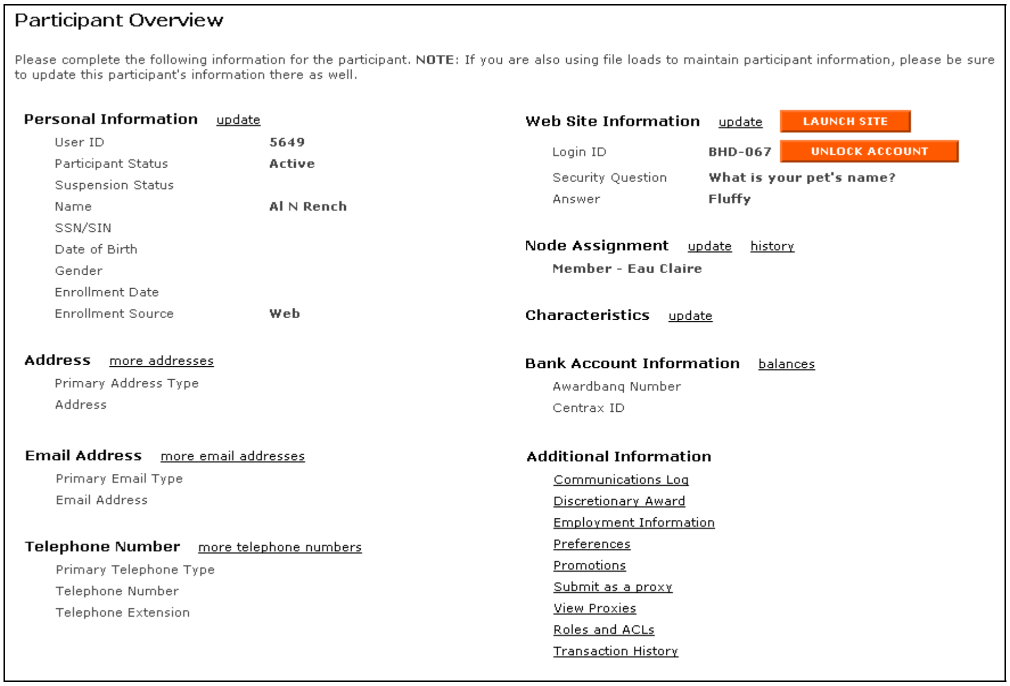


Table 23 – Update Participant

Field Label	Description
LAUNCH SITE button	Launches a *view-only* of what the participant's home page will look like. This is useful for describing or instructing the participant on how to use their personalized site or when troubleshooting. The user can log on to the participant's home page but has no update capability.
Personal Information: Address	The first address submitted defaults to the Primary address. The Primary address cannot be deleted. All secondary addresses can be deleted.
UNLOCK ACCOUNT button	Allows a user to unlock an account whenever a participant has locked up their login when they have reached the maximum retries as defined in a system variable.
Additional Information	A number of links are listed for editing depending on the participant. For example, account memberships, active/enrolled promotions, communication logs, transaction history, security information, balances, etc.

Rules/Considerations

- Required fields (indicated with an asterisk on the Add Participant page) are identified via system parameters.
- When a participant is added to the system, two Welcome emails are sent to the participant: one email for Login ID and one for Password. You can override having two emails sent via a system parameter and allow one email sent for Login ID and Password. (This is set up during system configuration and program installation.) **NOTE**: Security requirements require client authorization to change.
- Multiple address, phone, email and employment records can be attached to a participant, with only one identified as primary.
- The first address submitted defaults to the Primary address.
- The Primary address cannot be deleted. All secondary addresses can be deleted.
- The Primary Address designation can be changed between addresses of like country codes. For example, changing the primary address of Minneapolis to an address in Chicago is valid. Changing a Minneapolis address to Italy is NOT valid.
- Country code can only be entered at the original creation of the participant's record. Subsequent updates to this field are view only.
- SSN/SIN is unmasked for the Process Team, BI Administrator and BI Super Administrator.
- The system interfaces with AwardBanQ and stores the account number in the participant's record. The AwardBanQ and account number are displayed on the *View Participant Overview* page, which is viewable by BI or Client administrators only.

See Also

- Adding Users and Participants on page 21
- Updating and Inactivating Users and Participants on page 52

Promotions

Description: The Platform recognizes the following promotion types: Product Claims, Recognitions, and Quizzes.

Audience: User, BI Administrator, PAX Administrator.

Prerequisites: Prior to using the file load procedure, the following must have been completed:
- One or more claim forms must be created.
- Participants assigned to a promotion must be loaded.

Access:

Product Claims

The following information describes the information required to set up and complete a Product Claim promotion. In most instances, each step of the wizard requires similar information for each type of promotion. Where differences exist, or if there are special requirements and steps in the wizard, these are noted under the appropriate promotion heading.

View Promotion List

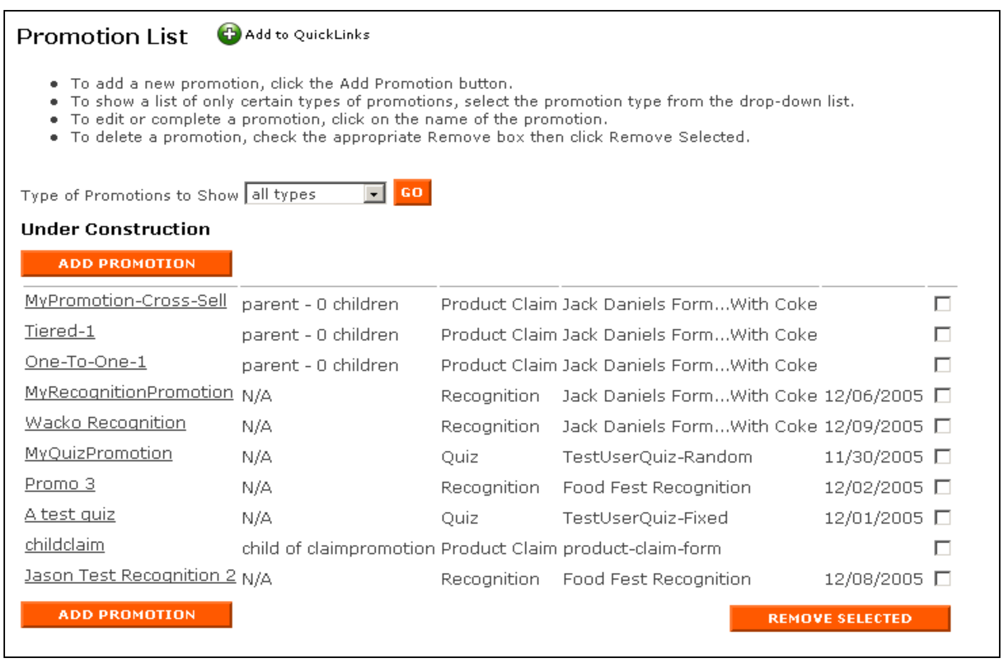


Table 24 – View Promotion List Field Descriptions

Field Label	Description
Type of Promotions to Show	Click the drop-down list to display a list of available promotion types.
ADD PROMOTION button	Click to add and define a new promotion.
Under Construction	Displays a list of promotions that have not been completed.
Name	Displays the name of the promotion that was created. Click the name of the promotion to go to an overview page.
Promotion Family	Displays the promotion family name(s), which includes the parent and child names.
Type	Displays the promotion type, such as product claim, recognition, and quizzes.
Form	Displays the name of the claim form that is used for this promotion. Click the name to edit the form, if necessary.
Last Updated	Displays the date that this promotion was last updated.
Remove?	Check this box if you want the promotion deleted, then click Remove Selected.
REMOVE SELECTED button	Check the Remove box then click this button to delete a promotion.
Complete	Displays a list of completed promotions.
Live	Displays a list of promotions that are active. This is based on the promotion start date.
Live Date	Displays the date the promotion went live.
VIEW LIST OF EXPIRED PROMOTIONS button	Click to display a list of promotions that are no longer active, on a separate page.

Add New Promotion

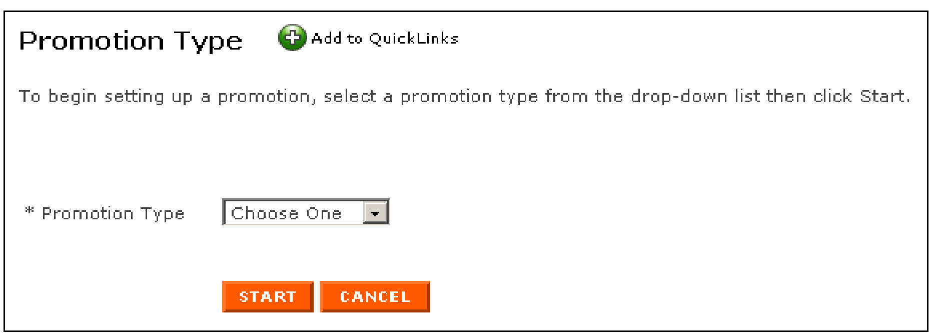


Table 25 – Add New Promotion

Field Label	Description
Promotion Type	Select the promotion type from the drop-down list.
START/CANCEL buttons	Click Start to begin defining the promotion. Click Cancel to return to the previous page.

Product Claim Promotion: Basics

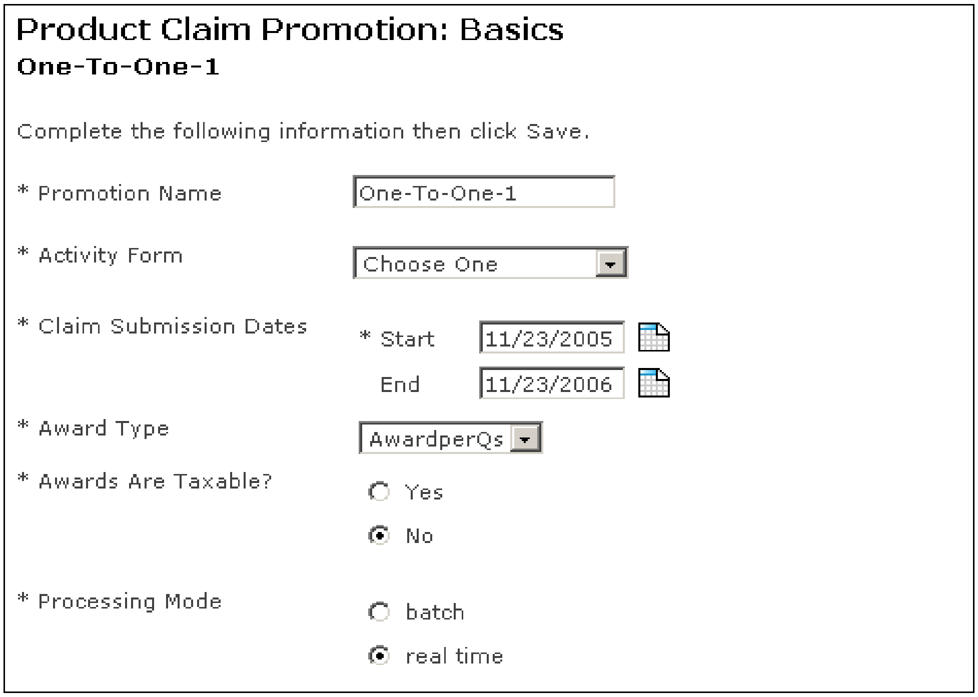
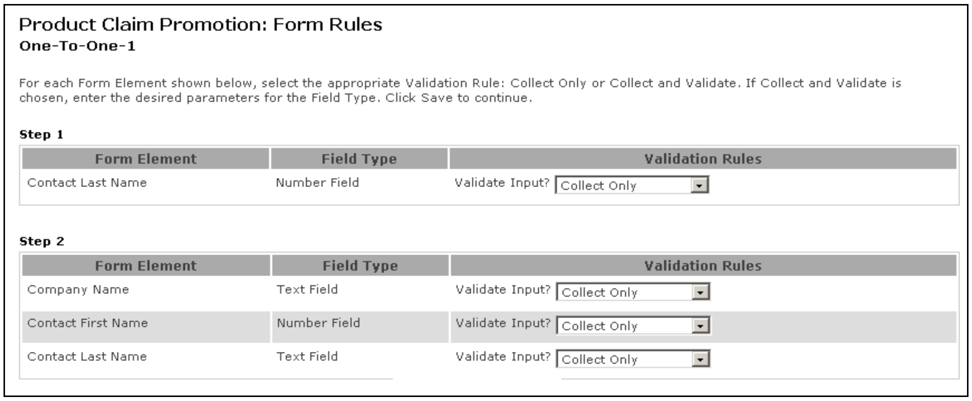


Table 26 – Product Claim Promotion: Basics

Field Label	Description
*Promotion Name	Enter a unique promotion name.
*Activity Form	Select the claim or activity form that is associated with this promotion. A claim form must have been created to appear in the drop-down list for this type of promotion. (See Form Library.)
Claim Submission Dates	Enter the date range during which claims can be submitted. The claim submission date cannot be prior to the Start Date. It is not necessary to enter an ending date.
*Awards Are Taxable	Select No or Yes if the product claim is taxable. (Work with your Business Analyst during the project definition phase to identify what is taxable.)
*Processing Mode	Select real time or batch mode. Most frequently, the default real time is chosen for immediate processing. Batch mode is used whenever you want a group of claims to be processed or at a later time.
SAVE & CONTINUE button	Click to save your entries and move to the next step in the wizard.
SAVE & EXIT button	Click to save your entries and exit the promotion wizard.
CANCEL button	Click Cancel to exit the promotion wizard. **NOTE: All entries will be lost.**

* Required Fields

Product Claim Promotion: Form Rules



Product Claim Promotion: Form Rules
One-To-One-1

For each Form Element shown below, select the appropriate Validation Rule: Collect Only or Collect and Validate. If Collect and Validate is chosen, enter the desired parameters for the Field Type. Click Save to continue.

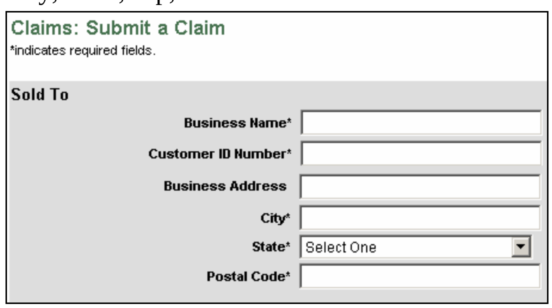
Step 1

Form Element	Field Type	Validation Rules
Contact Last Name	Number Field	Validate Input? Collect Only

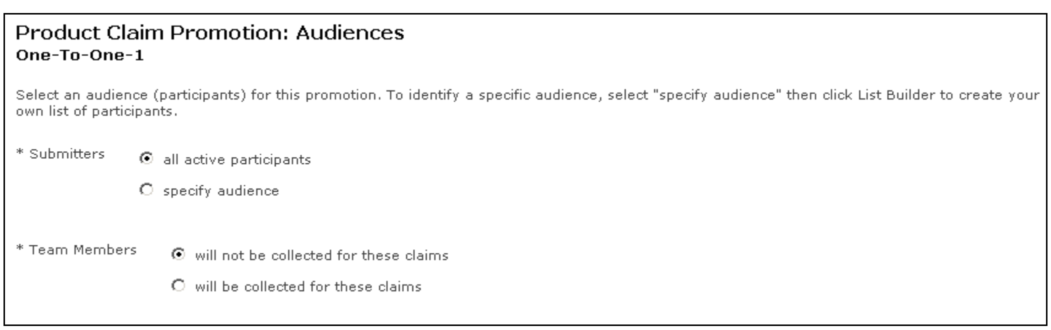
Step 2

Form Element	Field Type	Validation Rules
Company Name	Text Field	Validate Input? Collect Only
Contact First Name	Number Field	Validate Input? Collect Only
Contact Last Name	Text Field	Validate Input? Collect Only

Table 27 – Product Claim Promotion: Form Rules

Field Label	Description
Form Element	This is data that you want to collect on the form. For example, a typical claim form may look like the following and contain several labels (elements) that need to be completed, such as Business Name, City, State, Zip, etc:  Claims: Submit a Claim *indicates required fields. Sold To Business Name* Customer ID Number* Business Address City* State* Select One Postal Code* These elements are defined in the claim form (System>Form Library). Refer to Table 59 on page 137 for a description of form element examples.
Field Type	Identifies the type of field: Boolean, Integer, Text, Multi Select, Single Select, Date, or Decimal. (See Characteristic field types on page 150.)
Validation Rules	Select Collect Only or Collect and Validate from the drop-down list.

Product Claim Promotion: Audiences



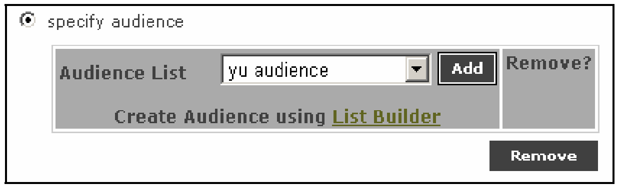
Product Claim Promotion: Audiences
One-To-One-1

Select an audience (participants) for this promotion. To identify a specific audience, select "specify audience" then click List Builder to create your own list of participants.

* Submitters
- all active participants
- specify audience

* Team Members
- will not be collected for these claims
- will be collected for these claims

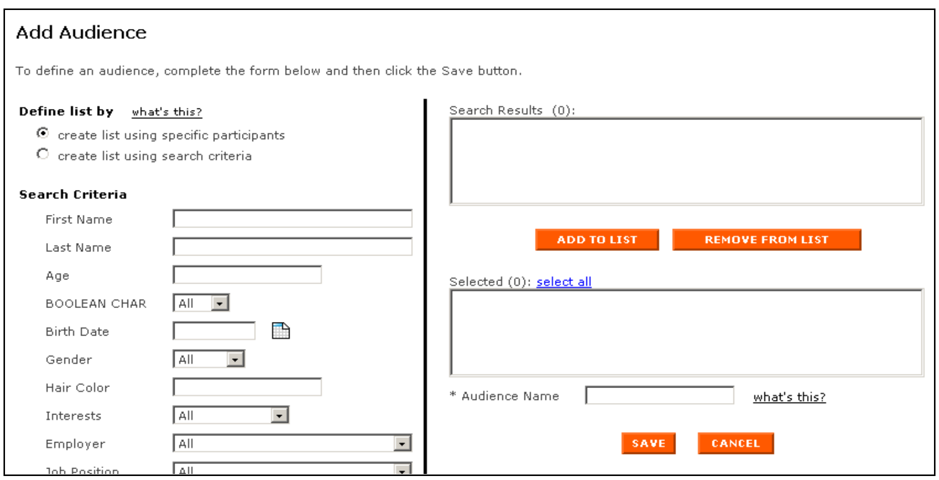
Table 28 – Product Claim Promotion: Audiences

Field Label	Description
*Submitters all active participants specify audience	Select all active participants as submitters in the promotion or click specify audience to make up a specific list of submitters. If you choose specify audience the program displays the Specify Audience page where you can add specific participants using List Builder. (See Using List Builder on page 92. 
*Team Members will not be collected... will be collected...	Select the appropriate option to collect or not collect claims from team members.

* Required Fields

Using List Builder

After clicking on List Builder, the *Add Audience* page appears where you can select an audience (specific participants) for promotion eligibility, email distribution, and home page content. In addition, you can reuse the audience lists for other functions.



Define a list by selecting create list using specific participants or create list using search criteria.

For additional, detailed information on creating an audience using List Builder, see Audience Definitions on page 120.

The List Builder function, used when specifying an audience, also appears in other places throughout the program. This includes:

Users:

- Participants > Searching for a participant
- System > Audience Definitions
- Communications > Send Ad Hoc Message

PAX Administrators:

- Admin > Participants > Search for a Participant
- Admin > System > Audience Definitions
- Communications > Send Ad Hoc Message

NOTE: The Search feature has a different version for the participant and administrator. The administrator has more fields from which to filter a search, such as filtering by node and characteristics.

Product Claim Promotion: Products and Payouts

Table 29 – Product Claim Promotion: Products and Payouts

Field Label	Description
*Payout Type	Select the desired payout type: One-to-One, Tiered, or Cross Sell. **One-to-One** – All product claims have a corresponding awards point value. For example, for every 10 widgets a participant sells they are awarded 1 point. **Tiered** – For every n^{th} product sold within a defined category grouping (meaning one-to-many categories), the participant receives a set number of award points. For example, for every 10 products sold within the electronics product group, the participant receives 5 points. **Cross Sell** – A participant is required to sell multiple products across multiple groups. For example, the participant must sell any 1 product from Group 1 and 5 products from Subcategory 2a within Group 2. For additional information regarding payout types, refer to Rules/Considerations for Payout Types on page 94.
Products	This displays whatever was defined in Setting Up Product Claim Forms – Form Library.

* Required Fields

Rules/Considerations for Payout Types

ONE-TO-ONE PAYOUT

- For a One-to-One payout type, each product submitted in the claim is evaluated independently by the promotion engine.
- The manager override payout only creates a journal transaction record in meeting processing status. When the process is run by the administrator, it is deposited to the bank system and the status changed to POST.
- If the product qualified for the promotion then the payout is calculated based on the formulas:
  - Payout amount for the submitter = Quantity of product sold * submitter payout amount defined in the promotion.
  - Payout amount for the team member = Quantity of product sold * team member payout amount defined in the promotion.
  - Manager override payout amount = x % of submitter payout amount (rounded up to the nearest integer).

<u>**One-to-One Example**</u>

If the claim submission had three products and all of them qualified then three activity transaction records are created and three journal transactions are created. The calculated payout is determined as shown below:

Product Name	**Submitter Payout** (defined in the promotion)	**Team member payout** (defined in the promotion)	**QTY**	**Calculated Payout Amount for the Submitter**	**Calculated Payout Amount for the Team member**
Pizza	5	1	2	10	2
Coke	2	1	2	4	2
Breadstick	1	1	1	1	1

TIERED PAYOUT

- There is no team member payout for a tiered payout type.
- A submitted claim qualifies for a tiered payout type if the sum of the quantity of products sold meets or exceeds the quantity defined in the promotion.
- To calculate the payout for a tiered payout type, total the quantity of all the products submitted in the claim (also include any carryover for the submitter for this promotion from previously submitted claims). Divide the result by the quantity defined in the promotion to get a quotient and remainder. The payout is calculated as described below:
  - Payout amount for the submitter = quotient * submitter payout defined in the promotion.
  - Manager override payout amount = x % of submitter payout amount (rounded up to the nearest integer)
  - If carryover is allowed then save the remainder for the submitter for this promotion in the database to be used with future submissions.

Tiered Payout Example 1

Three products were submitted in the claim and the sum of their quantity *did not match* the quantity defined in the promotion. No payout is generated for this claim.

Product Name	**Submitter Payout** (defined in the promotion)	**Quantity** (defined in the promotion)	**Quantity** (sold from the claim)	**Calculated Payout Amount** (for the Submitter)
Pizza	10	5	1	NO PAYOUT
Coke			2	
Breadstick			1	

Tiered Payout Example 2

Three products were submitted in the claim and the sum of the quantity *matched* the quantity defined in the promotion.

Product Name	**Submitter Payout** (defined in the promotion)	**Quantity** (defined in the promotion)	**Quantity** (sold from the claim)	**Calculated Payout Amount** (for the Submitter)
Pizza	10	5	2	10
Coke			2	
Breadstick			1	

Tiered Payout Example 3

Three products submitted in the claim and the sum of the quantity *exceeded* the quantity defined in the promotion. If carryover is allowed then the remainder of three is stored for future calculation. If carryover *is not* activated, extras are ignored.

Product Name	**Submitter Payout** (defined in the promotion)	**Quantity** (defined in the promotion)	**Quantity** (sold from the claim)	**Calculated Payout Amount** (for the Submitter)
Pizza	10	5	5	10
Coke			2	
Breadstick			1	

CROSS-SELL PAYOUT

- A submitted claim qualifies for a cross-sell payout type if the claim has the products from the same group and the quantities either match or exceed the quantity defined in the promotion.
- No carryover is allowed in a cross-sell type payout.
  - Payout amount for the submitter = number of times the group of products were sold * submitter payout amount defined in the promotion.
  - Payout amount for the team member = number of times the group of products were sold * the team payout amount defined in the promotion.
  - Manager override payout amount = x % of submitter payout amount (rounded up to the nearest integer).

Cross-sell Payout Example 1

Two products submitted in the claim matched Group 1 and the quantities *matched* the quantities defined in the promotion.

Product Name	**Submitter Payout** (defined in the promotion)	**Team Payout** (defined in the promotion)	**Quantity** (defined in the promotion)	**Quantity** (sold from the claim)	**Calculated Payout Amount** (for the submitter)	**Calculated Team Payout Amount**
Pizza	10	2	5	5	10	2
Coke			2	2		

Cross-sell Payout Example 2

Two products submitted in the claim matched Group1 but the quantities *did not match* the quantities defined in the promotion.

Product Name	**Submitter Payout** (defined in the promotion)	**Team Payout** (defined in the promotion)	**Quantity** (defined in the promotion)	**Quantity** (sold from the claim)	**Calculated Payout Amount** (for the submitter)	**Calculated Team Payout Amount**
Pizza	10	2	5	3	No Payout	No Payout
Coke			2	2		

Cross-sell Payout Example 3

Two products submitted in the claim matched Group 1 and the quantities *matched* the quantities defined in the promotion. Also the quantities sold were double the quantities defined in the promotion; as a result, the payout is also doubled.

Product Name	**Submitter Payout** (defined in the promotion)	**Team Payout** (defined in the promotion)	**Quantity** (defined in the promotion)	**Quantity** (sold from the claim)	**Calculated Payout Amount** (for the submitter)	**Calculated Team Payout Amount**
Pizza	10	2	5	10	20	4
Coke			2	4		

Overlapping Products in Promotion Setup

Overlapping products in the promotion setup are allowed, and are handled in the following manner for each of the payout types in order to avoid double dipping.

One-to-One Payout: For a one-to-one payout, if there are overlapping products, then the engine will pay out on every qualifying line item.

For example, if the products are defined like this:

Category	Sub-category	Product
Foods	Frozen	Peas
Foods	Frozen	Beans
		Pizzas

…and if the promotion is set up like this:

Category	Sub-category	Product	Quantity	Payout
Foods	Frozen	All	2	5
Foods	Frozen	Pizzas	1	1

…and if the claim submission has the following products:

Product	Quantity
Pizzas	2

…then the promotion will have the following payouts:

Product	Payout
Pizza	5
Pizza	2

Tiered Payout: For a tiered payout, with overlapping products, the promotion will pay out based on the quantity defined in the promotion.

For example, if the products are defined like this:

Category	Sub-category	Product
Foods	Frozen	Peas
Foods	Frozen	Beans
		Pizzas

…and if the promotion is set up like this:

Category	Sub-category	Product	Quantity	Payout
Foods	Frozen	All	2	5
Foods	Frozen	Pizzas		

…and if the claim submission has the following products:

Product	Quantity
Pizzas	2
Peas	2

…then the promotion will have the following payouts:

Product	Payout
Peas	5
Pizza	5

Cross-Sell Payout: For a cross-sell payout type, if there are overlapping products in the promotion, then the promotion will pay out based on the specific products first, then the sub-categories, and then the categories.

For example, if the products are defined like this:

Category	Sub-category	Product
Foods	Frozen	Peas
Foods	Frozen	Beans
		Pizzas

…and if the promotion is set up like this:

Group	Category	Sub-category	Product	Quantity	Payout
Group 1	Foods	Frozen	All	2	5
	Foods	Frozen	Pizzas	1	

…and if the claim submission has the following products:

Product	Quantity
Pizzas	2
Peas	2

…then promotion has to first look to see if the product pizza and peas are in any of the groups. If not, then the promotion has to look at the sub-category the product belongs to and finally at the category the product belongs to,

…then the promotion engine will have the following payouts:

Group	Payout
Group 1	5

…but, if the claim submission has the following products:

Product	Quantity
Pizzas	2

…then the claim does not qualify for Group1; as a result it does not get paid out.

NOTE: A payout of zero does not create a journal transaction record.

Product Claim Promotion: Approvals

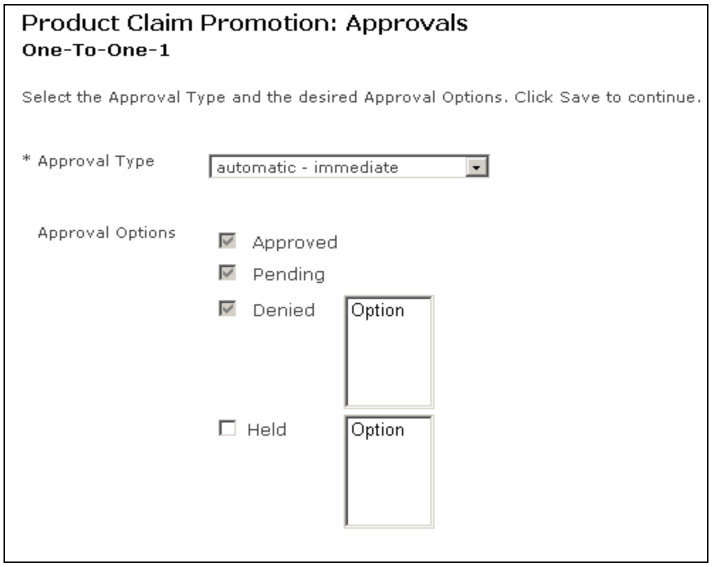


Table 30 – Product Claim Promotion: Approvals

Field Label	Description
*Approval Type	Select an approval type from the list.
*Approval Options	Select an approval option from the drop-down list. For example, options may include: approved, pending, denied, and held.

* Required Fields

Product Claim Promotion: Notifications

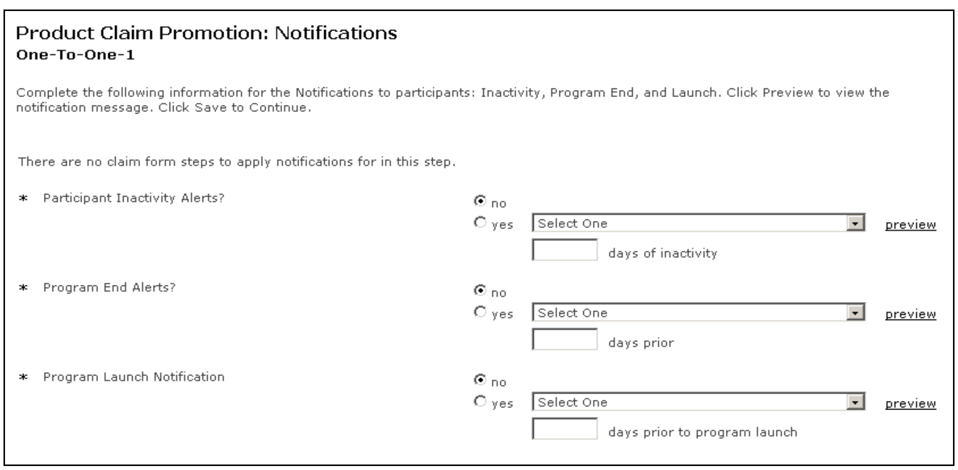


Table 31 – Product Claim Promotion: Notifications

Field Label	Description
Program Launch Notification	Select `no` or `yes` if you want a notification about the product claim sent to participants. If `yes`, enter the number of `days prior to program launch` you want notification of the promotion sent out.
Program End Alerts?	Select `no` or `yes` if you want an alert sent to participants just prior to the promotion end date. If `yes`, enter the number of `days prior` to the end date.

Field Label	Description
Participant Inactivity Alerts	Select no or yes if you want an alert sent to participants that have not submitted any claims after a certain number of days. If yes, enter the number of days of inactivity that must be met before a notification is sent.

Product Claim Promotion: Rules Text

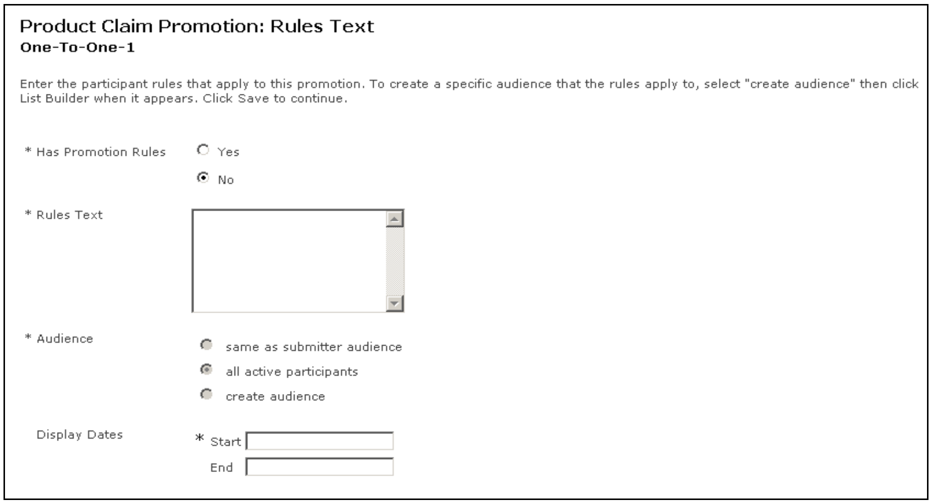


Table 32 – Product Claim Promotion: Rules Text

Field Label	Description
*Has Promotion Rules	Select Yes or No. If Yes, enter the rules in the Rules Text box. Selecting Yes causes the program to display a formatting tool bar above the Rules Text box.
*Rules Text	Enter the desired rules that participants must follow for a promotion then select the audience to whom the rules apply. Examples might include: • Who is eligible for the promotion • Required number of hours worked • Expiration or non-expiration dates of points earned • Carryover/transfer of points awarded • How points are awarded • Value of certificates • Redeeming points for rewards
*Audience	Select an audience to whom the rules apply: same as submitter audience, all active participants, create audience.
Display Dates	Enter a Start date for the promotion rules to be displayed. Enter an End date the rules will no longer be displayed or active. (The End date is not required.)

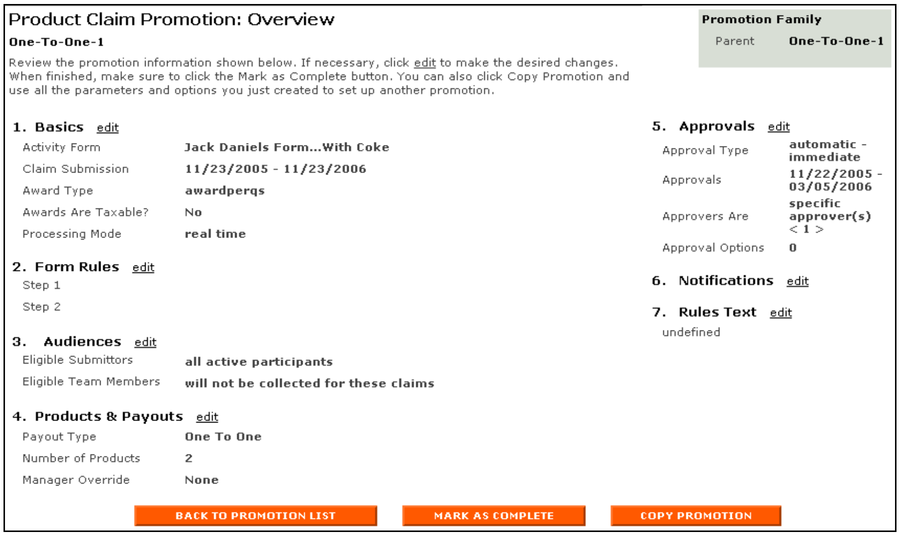
* Required Fields

Rules/Considerations

- Participants only see the link to the promotion rules to which they are assigned.
- Participants may view rules prior to submitting a claim for a promotion.
- Participants may be able to see the rules but cannot submit a claim.

- Once the Participant clicks view Rules, rules appear in same window as an inline page.
- The promotion rules should appear for all completed and live promotions as long as the current system date is within the promotion rules start and end dates.

Product Claim Promotion: Overview



The *Product Claim Promotion: Overview* page displays a summary of the information that you entered for each step of the Wizard. It also gives you an opportunity to edit any of the data.

NOTE: Be sure to click Mark as Complete if you are finished setting up your promotion. You can also Copy Promotion and use it for creating another one.

Recognition Promotion

The Recognition promotion Wizard contains 10 different steps: Basics, Form Rules, Audiences, Awards, Sweepstakes, Behaviors, eCards, Approvals, Notifications, and Rules Text.

Each step in the Wizard has similar functionality and features as described in the Product Claims Promotion Wizard, except for the setup of Awards, Sweepstakes, Behaviors, and eCards.

Recognition Promotion: Basics

Table 33 - Recognition Promotion: Basics

Field Label	Description
*Method Of Issuance	Select either online or file load (see File Loads on page 129).
*Additional Options	Check one or both options.

* Required Fields

Recognition Promotion: Form Rules

- Refer to Product Claim Promotion: Form Rules on page 91.

Recognition Promotion: Audiences

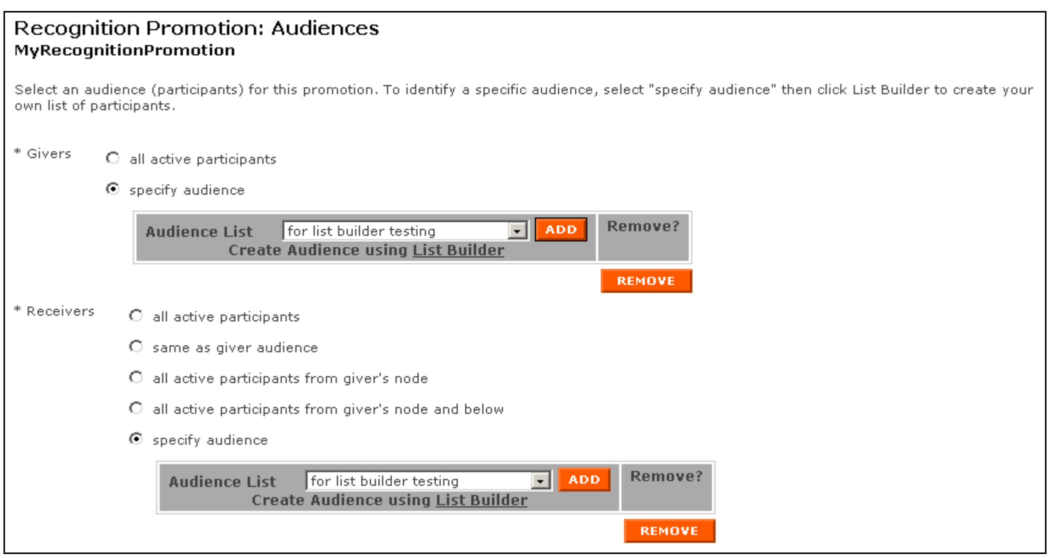


Table 34 – Recognition Promotion: Audiences

Field Label	Description
*Givers	Select all active participants or specify an audience of those who will be giving out recognition acknowledgements. (For more information about creating an audience list, refer to Audience Definitions on page 120.
*Receivers	Select all active participants or a different audience that will be receiving recognition acknowledgements and awards: same as giver audience – whoever was specified as a Giver in the previous selection. all active participants from giver's node – whoever is part of the giver's node in a hierarchy, such as the giver's division, district, branch, department, etc. all active participants from giver's node and below – whoever is included in the giver's node in a hierarchy and below it. For example, include those in the giver's district and branch. For additional information about nodes, refer to Node Assignments on page 80.

* Required Fields

Recognition Promotion: Awards

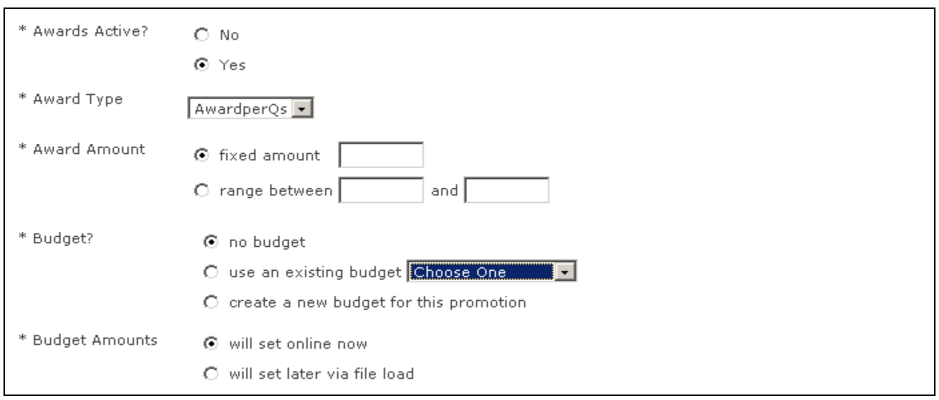


Table 35 – Recognition Promotion: Awards

Field Label	Description
*Awards Active	Select Yes or No.
*Award Type	Select the type of award used for this promotion. Possible choices include (depending on the type of awards set up): AwardperQs, cash, or points.
*Award Amount	Select fixed amount and enter the amount in the text box, or select range between and enter the range.
*Budget	Select the appropriate option. If an existing budget exists, select one to draw from in the drop-down list.
*Budget Amounts	Select will set online now or will set later via file load (see File Loads on page 129.

* Required Fields

Recognition Promotion: Sweepstakes

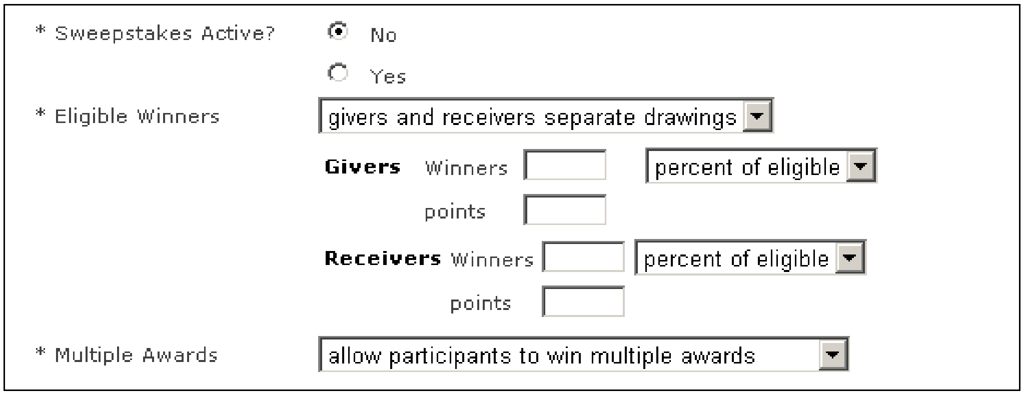


Table 36 – Recognition Promotion: Sweepstakes

Field Label	Description
*Sweepstakes Active	Select Yes or No depending upon if this promotion also includes a sweepstakes.
*Eligible Winners	Select who is eligible to win: Givers, Givers and Receivers Combined Drawing, Givers and Receivers Separate Drawings, or Receivers. Depending on what option was selected, enter the percent of eligible winners, number of winners and required points.
*Multiple Awards	Select whether participants can receive multiple awards or if there are limitations.

* Required Fields

A sweepstakes drawing may be based on participation as a giver or receiver, or both. If you want to include just one or the other, or want to have separate drawings for each, choose the "Individual Drawings" option. The "Combined Drawings" option includes all who give or receive anything in the program, in a single drawing.

When selecting sweepstakes options, you can select the amount you want to award each winner and select the desired number of winners.

NOTE: If you select percent of eligible the number of winners will vary based on the number of people who participate. This is an important consideration as this creates an open-ended award. For example, if you choose to select a percentage of 10%, have 3500 people who can participate, and 750 actually do, you will have 75 winners. But if 2000 instead of 750 actually participate, you will have 200 winners. When calculating sweepstakes you have the opportunity to eliminate any number of people that were drawn, (or re-run the entire sweepstakes drawing for the same time period). If your program rules state winning is based on a percentage of entries, there may be legal aspects to consider when approving the drawing results.

Rules/Considerations

- Sweepstakes can be used in Recognition and Quizzes.
- Sweepstakes is available under the Promotions menu for users and under Admin for Participants with administrative roles.

Recognition Promotion: Behaviors

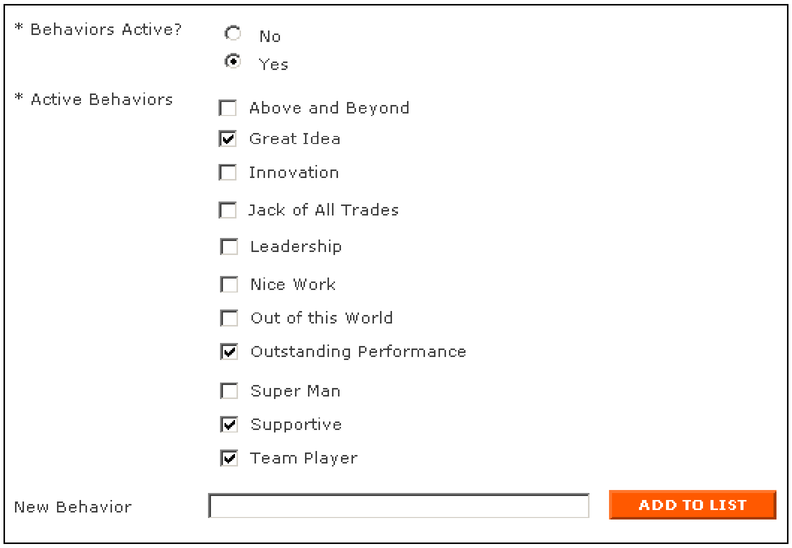


Table 37 – Recognition Promotion: Behaviors

Field Label	Description
*Behaviors Active?	Select Yes or No depending if the behaviors checked below are currently active and will be used in the selected promotion. Only certain types of behaviors are appropriate for different types of Recognition programs.
*Active Behaviors	Check the type of behaviors that you want active for the promotion you are setting up.
New Behavior	If desired, enter a new behavior then click Add to List to add the new behavior to the above list. Once added, it will be available in all future setups.
Add to List	Click to add the new behavior you entered into the New Behavior box to the list of Active Behaviors.

* Required Fields

Recognition Promotion: eCards

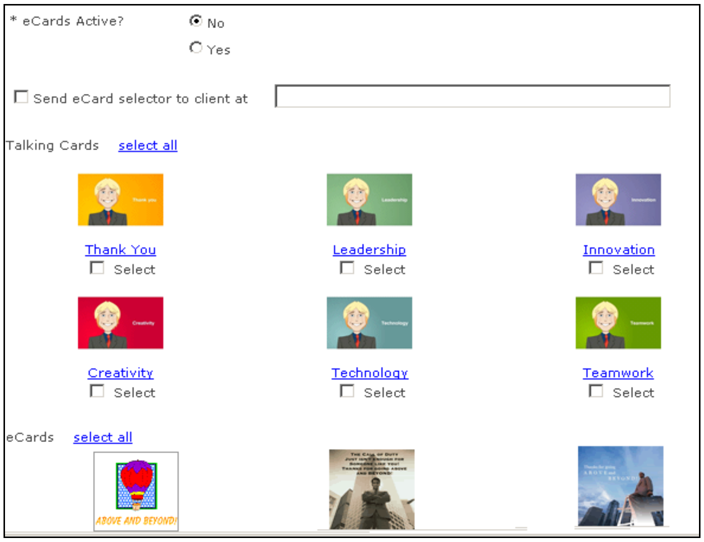


Table 38 – Recognition Promotion: eCards

Field Label	Description
*eCards Active	Select Yes or No if you want any or all of the eCards shown below made active.
Send eCard selector to client at	Enter the email address of the promotion administrator who should receive the collection of eCards that you select.
Talking Cards	Check one or more of the Talking cards to be activated, or click select all. To see a larger picture and to hear what is said, click on the thumbnail.
eCards	Check one or more of the eCards to be activated, or click select all. To see a larger picture of the eCard, click on the thumbnail.

* Required Fields

Recognition Promotion: Approvals

- See Product Claim Promotion: Approvals on page 99.

Recognition Promotion: Notifications

- See Product Claim Promotion: Notifications on page 99.

Recognition Promotion: Rules Text

- See Product Claim Promotion: Rules Text on page 100.

Quizzes

Quizzes require completion of seven Wizard steps: Basics, Audiences, Payouts, Awards, Sweepstakes, Questions and Answers, Notifications, and Rules Text.

Quiz promotions use either a random or fixed display format. A *fixed* format always presents the same number of questions in the same sequence. A *random* format presents at least a minimum number of questions in a different order, but not necessarily all questions.

The Platform only presents multiple choice questions.

NOTE: Refer to Quiz Library on page 165 for information about how to create a quiz and enter questions and answers.

Each step in the Wizard has similar functionality and features as described in the Product Claims Promotion Wizard. Differences are noted in the following text.

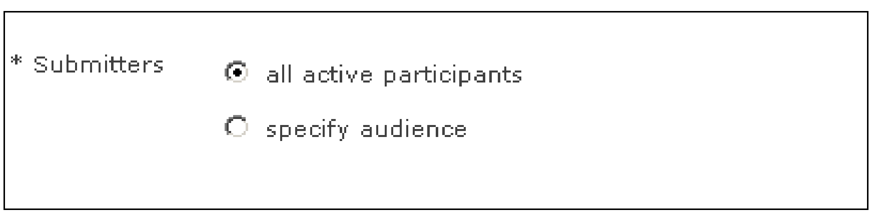
Quiz Promotion: Basics

Table 39 – Quiz Promotion: Basics

Field Label	Description
*Allow Unlimited Attempts	To allow unlimited attempts answering a quiz, select Yes. If No, enter the number of attempts that can be made. The number of attempts has no maximum.
Include Passing Quiz Certificate	Check this box if you want a Passing Quiz Certificate sent to the participant.

* Required Fields

Quiz Promotion: Audiences



You must define an audience or define a specific audience using List Builder (see Audience Definitions on page 120.

Quiz Promotion: Awards

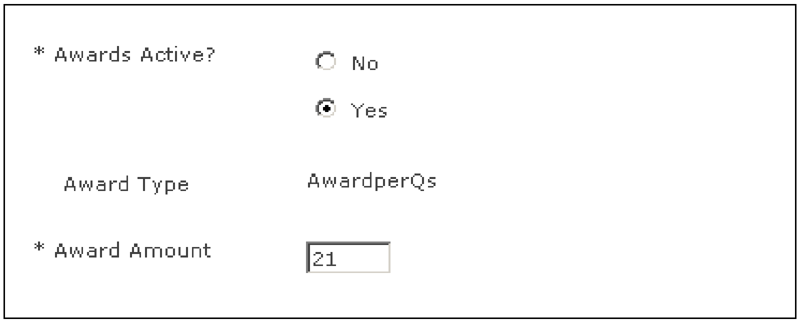


Table 40 – Quiz Promotion: Awards

Field Label	Description
*Awards Active	Select Yes if you want the award amount to be active.
Award Type	Displays the type of awards given.
*Award Amount	Enter the amount of the award. If awards are not active, enter 0. Do not enter dollar signs. Decimals are allowed if cash is selected.

* Required Fields

Rules/Considerations

- If awards are active then collect Payout type (AwardperQs, Points, or Cash) is required. No negative amounts are allowed and the amount has to be greater than zero.
- If AwardperQs, Points, or Cash is selected, then the amount to be paid out when a participant passes the quiz must be entered.
- Decimal places are allowed if cash is selected.

Quiz Promotion: Sweepstakes

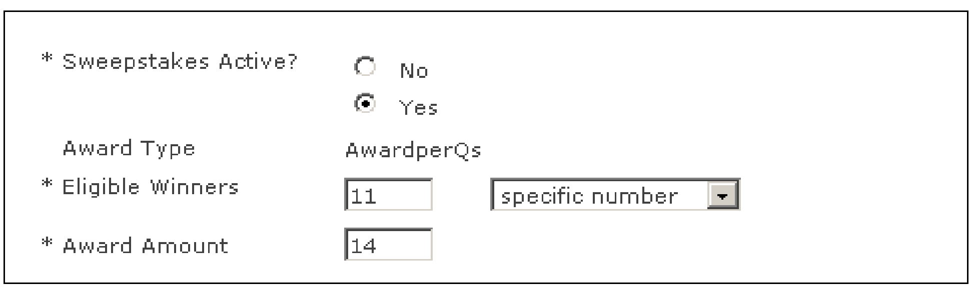


Table 41 – Quiz Promotion: Sweepstakes

Field Label	Description
*Sweepstakes Active	Select Yes if you want sweepstakes to be active.
Award Type	Displays the type of awards given.
*Eligible Winners	Enter the number of sweepstakes winners allowed. Choose whether the number of winners is a percentage or a specific number.
*Award Amount	Enter the amount of the award. If awards are not active, enter 0. Do not enter dollar signs. Decimals are allowed if cash is selected.

* Required Fields

NOTE: Payout for sweepstakes winners can be zero but not negative.

Quiz Promotion: Notifications

See Product Claim Promotion: Notifications on page 99.

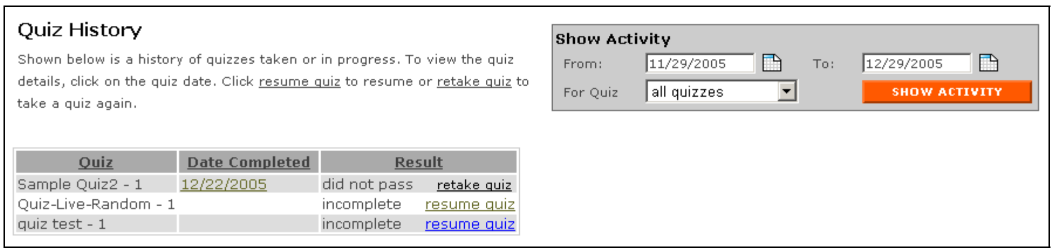
Quiz Promotion: Rules

See Product Claim Promotion: Rules Text on page 100.

Rules/Considerations

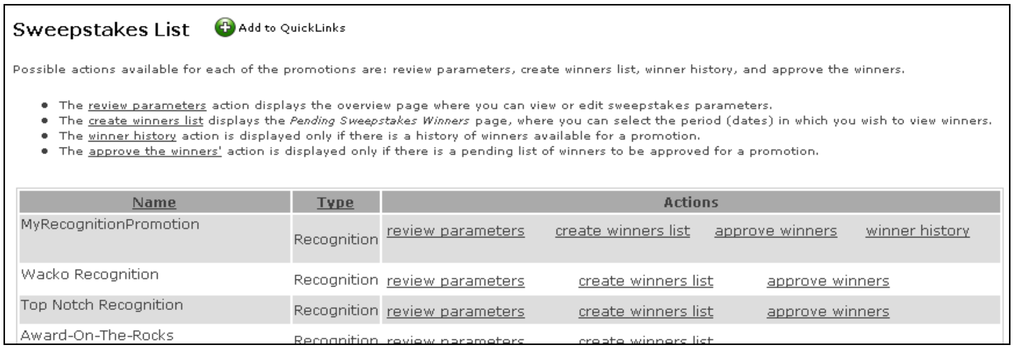
Refer to Quiz Library on page 165 for information about how to create a quiz and enter questions and answers.

View Quiz History



The *Quiz History* page, when selected by a participant from the Quizzes tab, enables a participant to review a summary of quizzes taken, including: questions and answers, correct answers, date completed, applicable promotions, and the result.

View Sweepstakes



The *Sweepstakes List* page displays all the live and expired promotions that have the sweepstakes option active. This page displays the promotion Name, Type of promotion/module and the possible Actions that are available.

Table 42 – Sweepstakes List

Field Label	Description
Actions column	Possible actions available for each of the promotions are: review parameters, create winners list, winner history, and approve the winners. • The review parameters link displays the *Promotion Overview* page for the Sweepstakes where parameters can be viewed or edited. • The create winners list displays the *Pending Sweepstakes Winners* page, enabling you to select the period in which you wish to view winners. • The winner history link is displayed only if there is a history of winners available for a promotion. This shows all the selected periods for which winners have been calculated. Within each period the winners and their awards are displayed. • The approve the winners' link is displayed only if there is a pending list of winners to be approved for a promotion.

See Also

- Recognition Promotion: Sweepstakes on page 104
- Quiz Promotion: Sweepstakes on page 108

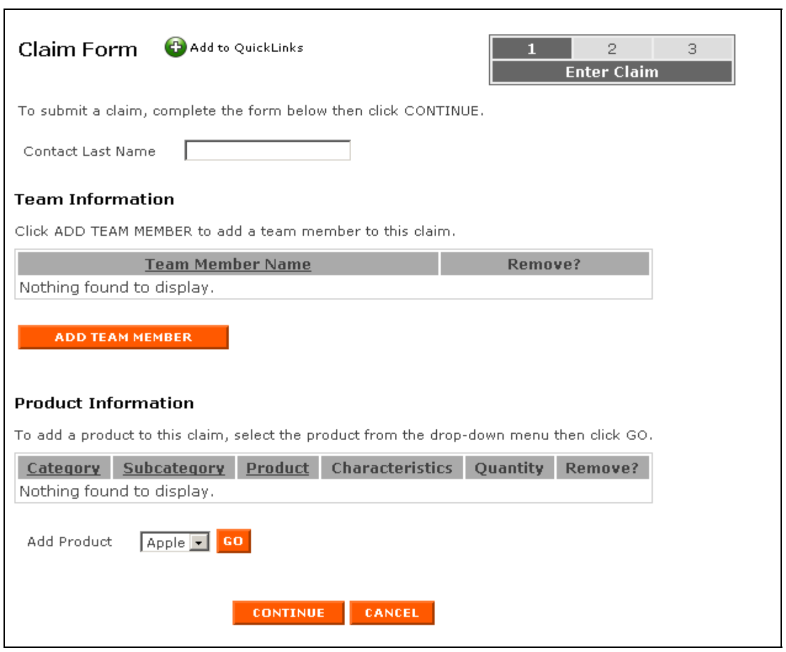
Promotions (participant)

Description	Participants can submit, edit, and view claims for any current promotions that are active, such as Product Claims, Recognition, and Quizzes.
Audience:	Participant and PAX Administrator.
Access:	Submitting, editing, and viewing claim options are selected from the appropriate promotion tab.
Prerequisites:	Promotions must have been created, successfully marked as complete, and be active (Live).

Product Claims

Each product claim promotion appears as a menu item below the promotion tab. Two options will appear as a menu item: Submit Claim and View Rules (or similar wording).

Submit Claim



NOTE: The above illustration is only an example. The claim form is based on what was previously defined and attached to a promotion when it was set up. The claim form can vary considerably between two master promotions.

Table 43 – Claim Form

Field Label	Description
Track this activity to	Select the appropriate node from the drop-down list, which will be used for tracking the claim activity.
Company Name, Contact Name, etc.	These fields will be different depending on what was included in the claim form when it was set up.
Product Information	Lists the products submitted with each claim. To make changes to the claim, click edit.
Add Product	Select a product from the list that you are claiming then click Go. The program displays the *Product Details* page where the participant can enter more details; for example, what was sold).
REMOVE SELECTED button	Check the Remove? box for a claim listed above, then click Remove Selected to delete the claim from the list.

* Required Fields

Product Claim History

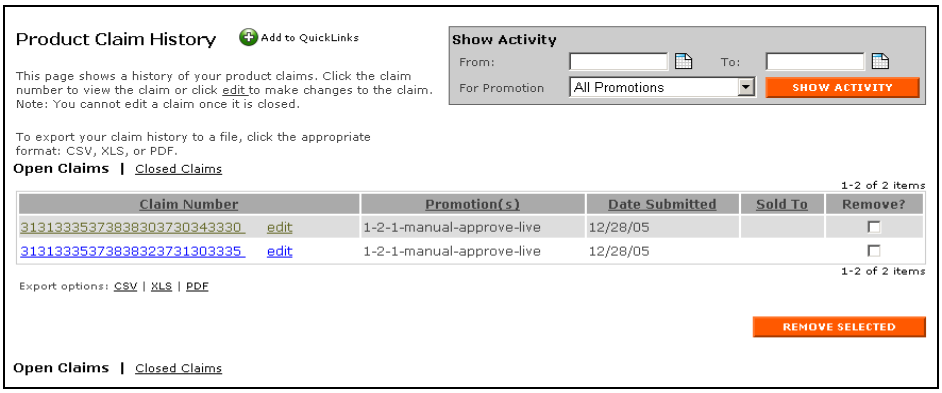


Table 44 – Product Claim History

Field Label	Description
Show Activity	Enter the starting and ending dates for the claims that you want to display. Also select for what promotion(s) you want to display then click Show Activity.
Open Claims	Shows the claims that a participant submitted but has not yet been approved. If necessary, click a Claim Number to view the product and payout information.
Closed Claims	Shows the claims that a participant submitted and was approved. If necessary, click a Claim Number to view the product and payout information.

* Required Fields

Proxy

Description	A proxy is a participant who is authorized to act for another participant. A participant can submit an activity on behalf of participant(s) who have given them proxy rights to do so.
Audience:	User, PAX Administrator, BI administrator, Participant
Prerequisites:	Participants have assigned proxies to act on their behalf in submitting claims.
Access:	

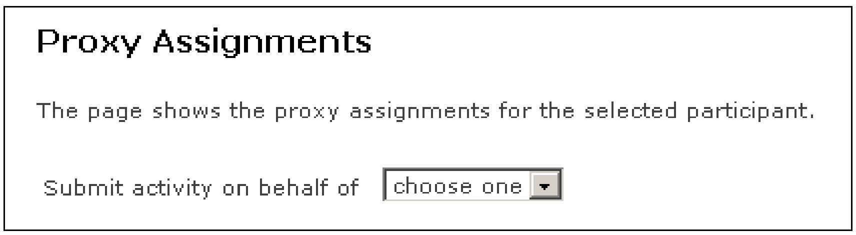


Table 45 – Proxy Assignments

Field Label	Description
Submit activity on behalf of	Select a participant from the drop-down list in order to view a history of claims submitted by the that participant.

The user can select a participant from the drop-down list who can submit an activity (claim) on behalf of the participant.

NOTE: Proxies for the participant is found under the My Info tab, titled My Proxies on page 81.

Rules/Considerations

- A participant has a tab on the main navigation tab if one or more participants have given the participant proxy rights.
- A participant can only set a proxy for themselves not for other participants.
- A user (administrator) can set proxy rights for a participant via the Proxy tab on the Home page.
- A participant can set one-to-many proxies per promotion.
- A participant can set a proxy for all promotions. This enables the participant to have a proxy without having to set the proxy on individual promotions.
- A participant can only set proxy rights for those modules activated for their login ID.
- A participant can set a proxy for all current and future modules and promotions.
- The same proxy can be reused across participants. For example, Carol is the proxy for multiple participants within the NSD group. However, each participant within the NSD group still needs to individually set Carol as their proxy.
- Potential modules where proxy applies are Claims, Recognition, or Nominations.
- A Proxy can only do submissions, not approval activities.

- When a participant selects a promotion under the Proxy tab, they will enter into the promotions submission workflow in Proxy mode. Submission is identical to a normal participant submission; however, the Proxy relationship is tracked for history purposes.
- A participant will select the person they are acting on behalf of, if they are assigned more than one time.
- A history link is available at the proxy level:
- The Nomination and Recognition modules are view only and show the submission summary and detail history for these modules.
- The Product Claims history link shows the Proxy submitter on the Product Claim list with the same view/update capabilities as the participant for whom they are submitting.
- BI users/administrators, with the proper ACL assignment, are allowed to act as a proxy for all participants.
- Once a user has successfully searched for a specific participant, the user can click on the Proxies link to view data for the participant.

See Also:

- My Info on page 78
- My Proxies on page 81

Reports

Description: Depending on what promotions are active, users can view a variety of useful reports in several different formats, such as summary and detail reports, bar charts, pie charts, and trend analysis..

Audience: User, PAX Administrator, BI Administrator

Prerequisites: Reports are defined and set up during the system configuration and definition phase. Contact your Development Team for more information.

Access:

Select the Reports menu from the Reports tab to view a listing of available reports, access report parameters for customization, and to view a report.

Available reports include:

- AwardperQ Deposits
- Budgets
- Enrollment
- Product Claims
- Quizzes
- Recognition

Each type of report enables you to customize it using the following parameters:

Basics

- Report format: Summary, Details, Pie Chart, Bar Chart, or Trend Analysis
- Promotion: All or by promotion

Timeframe

- Starting and ending dates

Participants

- All participants, active participants, or inactive participants
- Job position
- Department

Report layouts for AwardperQs, Budgets, Enrollment, Product Claims, and Quizzes are shown in Appendix C – Report Layouts.

Rules/Considerations

- Report data is audience smart. Any user with report access privileges is only able to view data that is assigned to that user, whether by hierarchy or other assignments.
- All reports provide a print-friendly view of currently displayed report/data. Navigation/form buttons to print and cancel/back are included.

- All reports can generate a PDF, Excel or CSV version of the displayed report.
  NOTE: Visually identify the client/program to which the report belongs beforehand.
- All reports extract raw data reflected in the current displayed report and its data as well as all underlying data reflected in the current view in Microsoft Excel (up to 65,000 limit) or CSV format (including column headings). The export function includes all pertinent data relative to the record. The exported file is sent to the user via email.
- The user is able to sort a data set by all column headings. Click once to sort in ascending order, click twice for descending order. If data appears on more than one page and the user clicks a column header to resort the data on page 2 or more, the data is resorted to the first page.
- For all batch reports, the display date and time report was generated (time reporting tables were updated, not the time the time the actual report was displayed). For all real time reports, the display date/time stamp report is the date the report was accessed/generated.
- For all drill-down reports, a breadcrumb trail reflects the progression.
- The user can query data by using from/to dates. (**NOTE**: the default From date is established as a system parameter at setup. This date reflects the client's desired calendar start date. For example, Client A's fiscal year is July 1 through June 30. The client can define July 1 as the calendar start date for all reports. The default To date is the date the report was generated.
- The report Start Dates options is set for program launch or another specified start date. Fiscal year start: Calendar (Jan 1, Apr 1, Jul 1, Oct 1) or 52/53 week (first/last S-S of month).
- The Report Menu page lists available reports with a description. Only reports with the corresponding promotion module are displayed.
- If a given report needs to be created on multiple pages, the page navigation buttons (<< < previous 1 2 3 next > >>) is used. There is a 2,000 record maximum with 200 records per page times a maximum 10 pages. If a detail report query determines that more than 2,000 records meet the criteria, no records will be displayed. An error message will be shown stating that the maximum number of records to display has been exceeded and that the user must refine their query.
- When exporting data, the node name and/or hierarchy path must be included for each record.
- For all detail pages, the record count above the results table is displayed.
- Wherever individual participant names are displayed in the detail view, the following format is used: <last name>, <first name> <middle name or initial> <suffix>
- Reports are assigned by roles; by default all managers are included. BI Admin roles have access to all reports at all levels (**NOTE**: A user *may not* be part of a defined hierarchy).
- For all reports using a detail view, each node will display data for itself and everything below. The top node will contain data for all levels of the hierarchy; the next node down will contain data for everything except the top node, and so forth.

Shop (participant)

Description: The Shop tab links to the AwardperQs online awards web site where participants can cash in their AwardperQs for merchandise, travel, events tickets or other types of items. The online award site will be different for each client.

Audience: PAX Administrator, participant

Access:

System

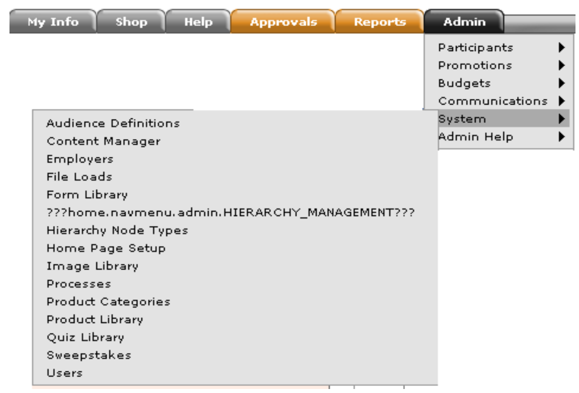
ACLs

Description ACLs (Access Control Lists) determine user access to specific fields or what is viewed, such as social security numbers, account numbers, and bank numbers. For example, the ACL for a participant's social security number (Participant_SSN_Access) provides four different permissions levels that can be assigned: VIEW_NONE, VIEW_MASK, VIEW_FULL and EDIT.

Audience: User, PAX Administrator, BI Administrator

Prerequisites Specific ACLs and access controls are set up during the system definition and configuration phase. For more information, contact your BI Technical Advisor or Development Team.

Access:



ACL

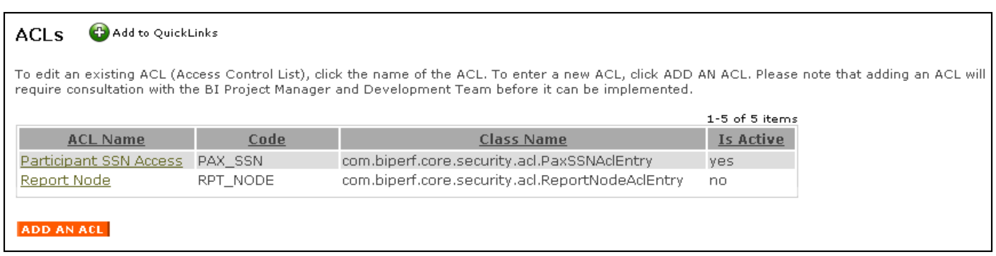


Table 46 - ACL

Field Label	Description
ACL name entry	Click the ACL name to update the ACL name, code, help text, class name and to set its status..
ADD AN ACL button	Click to add a new ACL and define its parameters.

* Required Fields

Edit ACL

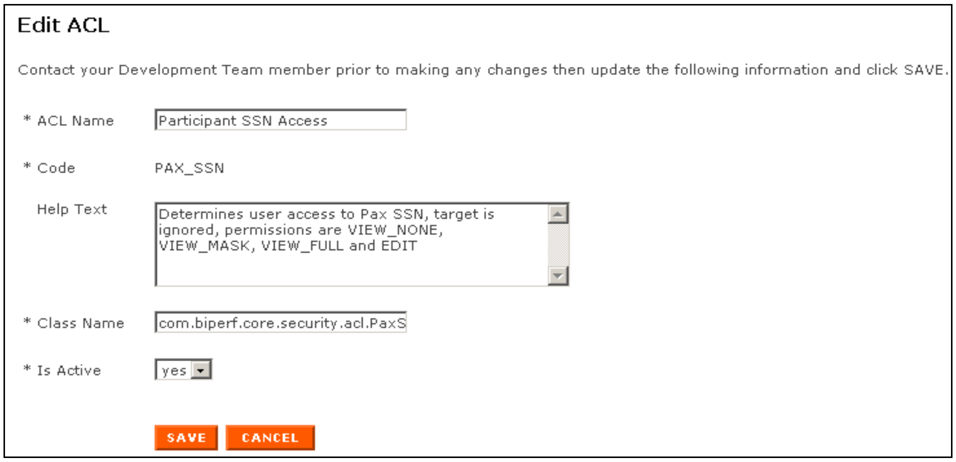


Table 47 – Edit ACL

Field Label	Description
*ACL Name	Enter a unique name for the ACL.
*Code	Code for this specific ACL is defined during system definition and configuration. Contact your Development Team member for the appropriate code.
*Help Text	Enter text that describes the purpose of the ACL.
*Class Name	Class Name for this specific ACL is defined during system definition and configuration. Contact your Development Team member for the appropriate class name.
*Is Active	Select Yes or No to activate this ACL.

* Required Fields

Rules/Considerations

- Roles and ACLs cannot be deleted, only inactivated.
- Inactive Roles and ACLs are available for assignment to a user or participant.
- Maintaining the user ACL assignment is performed during maintenance of user profiles (System>Users>User Name>Roles>Update).
- The user is presented with a list of current ACLs for a selected user and a list of available ACLs from which to add. Available ACLs can be added to the user role or assigned ACLs can be removed. The *User Overview* page will redisplay with the current set of assigned ACLs.

System

Audience Definitions

Description	Audience Definitions (often referred to as segmentation) is a means of creating a group of participants who are eligible to perform an activity or view content.
Audience:	User, PAX Administrator, BI Administrator
Prerequisites	Participants are loaded. Hierarchies are set up.

Audience Definitions

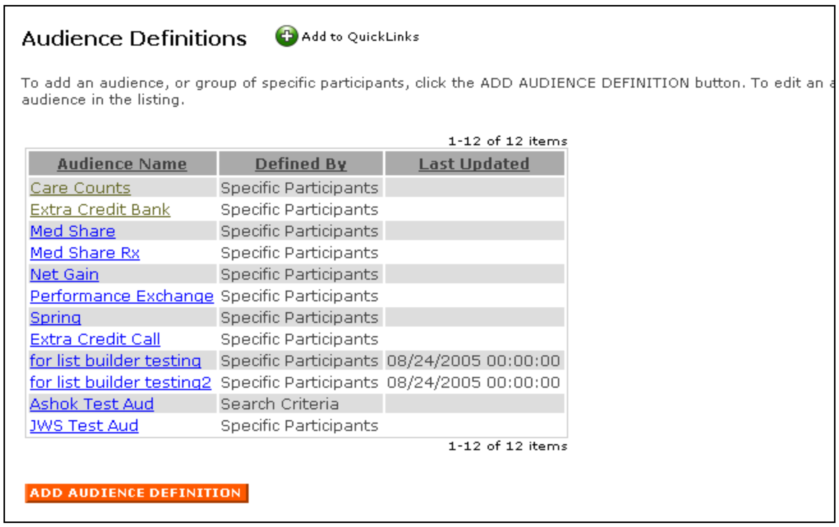


Table 48 – Audience Definitions

Field Label	Description
Audience Name	Displays the label used to describe the group of selected participants.
Defined by	Lists whether the audience was defined by specific search criteria or by selected participants.
ADD AUDIENCE DEFINITION	Click to define an audience based on selected participants or search criteria.

* Required Fields

Add Audience

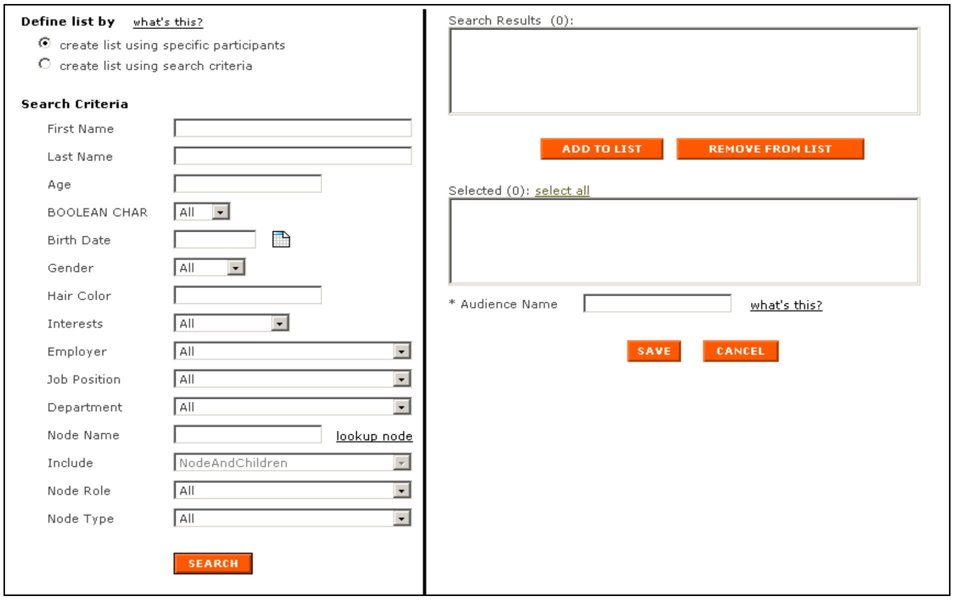


Table 49 – Add Audience

Field Label	Description
Define list by create list using specific participants	Use this option to create an audience by selecting participants individually from the entire list of participants. Click the SEARCH button to display the entire list in the Search Results box from which you can choose individual participants.
create list using search criteria	Use this option to create a list of participants based on the defined search criteria. (The page will refresh and display a different set of criteria.)
Search Criteria	Enter any number of criteria in order to narrow down the list of participants from which to choose. Click the SEARCH button to display the list of participants in the Search Results box based on your criteria.
Search Results (0)	Displays an entire list of participants or only those participants based on the search criteria you entered.
ADD TO LIST button	Select one or more names from the Search Results box then click add to list to move the chosen names to the Selected list box below. To add all names to the Selected box, click select all after the Search Results label.
REMOVE FROM LIST button	To remove any names, select one or more names then click remove from list.
Selected (0) select all	Click one or more names, or click select all to create an audience of participants.
*Audience Name	Enter an audience name then click Save. **NOTE**: Cancel will cancel all your selections and return to the previous page.

* Required Fields

NOTE: The search criteria displayed on the *Add Audience* page varies depending on what was set up for Participant characteristics. For additional information refer to Participant Characteristics on page 150.

Lookup Node

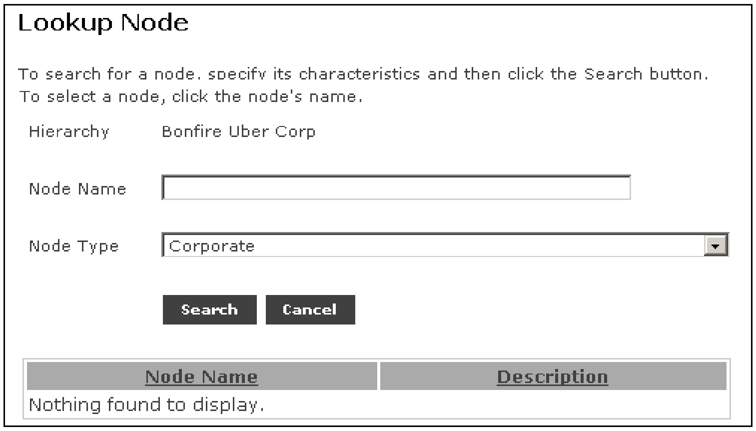


Table 50 – Lookup Node

Field Label	Description
Hierarchy	The label given to the tree-like structure that identifies how an organization is organized. The hierarchy displayed here is the primary node.
Node Name	To search for a node and specify its characteristics, click the SEARCH button.
Node Type	To select a node, click the node's name.

Rules/Considerations

- An Audience Definition is defined by:
  - Specific participant(s) (Non-Criteria based)
  - Criteria based
- Criteria based definitions provide the ability to search using the following fields:
  - First name
  - Last name
  - Participant characteristics
  - Employer
  - Job title/position
  - Department
  - Nodes of the primary hierarchy only (lookup)
  - Node types
  - Node type characteristics
- An Audience name is required and should be unique. BI and Admin are system audience names and should not be used.
- If the definition is non-criteria based, individual participant(s) are stored to a segment.
- If the definition is criteria based, the criteria is stored to a segment and the number of participants that met the criteria and the participants that meet the criteria are displayed.
- When searching by node, the Node Name or Node Name Lookup (leaving the field blank is the default and implies searching the entire hierarchy) sets the starting node for the search:
  - Selects the Include option (Selected Node Only or Selected Node and Children).

  - Selects the Node Type (drop-down list box of all Node Types in the hierarchy).
  - Selects the Node Role (defaults to member).
  - Selects one Node Characteristic, which applies to the selected Node Type.

- On Criteria based Audience Definitions the user is not allowed to search for criteria and then remove participants from the searched/selected list.
- If Non-Criteria based Audience Definitions are used, the participant first name, middle initial, last name, job position/title and department is displayed in the search results and selected sections.
- If Criteria based Audience Definitions is used, the number of participants who matched the criteria and a link to view or hide the participants are displayed who met the search criteria in the search results and selected sections.
- Provides the ability to include just the nodes that match the search or also the child nodes.
- Provides the ability to lookup existing segmentations and change the segment definition.
- Audience Definitions can be used for promotions, newsletters, welcome messages, emails etc.
- Audience Definitions once defined cannot be deleted.
- Sorting is performed alphabetically by last name.
- A message is displayed if the user changes the define by option when the selection section is not empty.
- On Non-Criteria based searches, if a participant is already in the selected section and a new search is done then that participant will not appear in the search results section.

NOTE: If an Audience Definition is Non-Criteria based then future or existing participant/node changes will not affect the Audience Definition (segmentation) list. If an Audience Definition is Criteria based, no administrative interference is required to add participants/nodes to the segmentation list.

System

Content Manager

Description	Content Manager is used to create and update text that appears on the web site. It is accessed by clicking on the System tab and selecting Content Manager. For example, Content Manager enables a user to create welcome stories, FAQs, newsletters, and other text that appears on the web site.
Audience:	User, PAX Administrator, BI Administrator

A description of how to use Content Manager is included in Setting Up Your Site Using Content Manager on page 40.

For additional information about Content Manager, refer to the *Content Manager User Guide*, version 2.0 published by Object Partners, Inc. Request a copy from your Development Team.

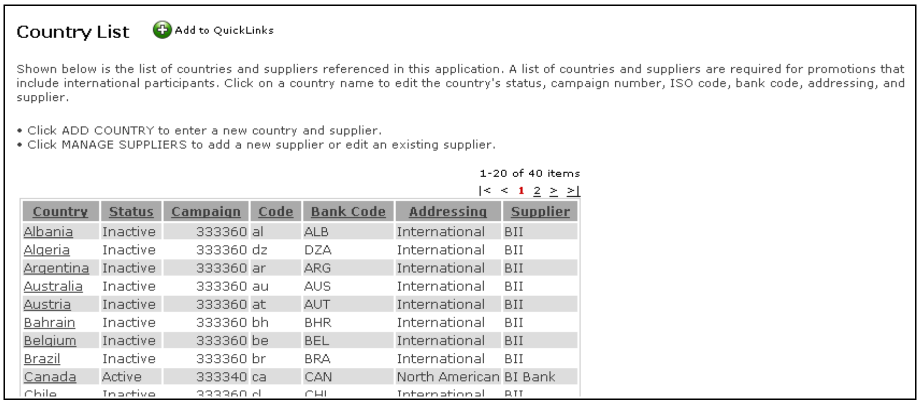
System

Countries and Suppliers

Description Add, view, and add to a list of countries that can be activated as needed for promotions that include international participants.

Audience: User, PAX Administrator, BI Administrator

Country List



Country List Add to QuickLinks

Shown below is the list of countries and suppliers referenced in this application. A list of countries and suppliers are required for promotions that include international participants. Click on a country name to edit the country's status, campaign number, ISO code, bank code, addressing, and supplier.

- Click ADD COUNTRY to enter a new country and supplier.
- Click MANAGE SUPPLIERS to add a new supplier or edit an existing supplier.

1-20 of 40 items

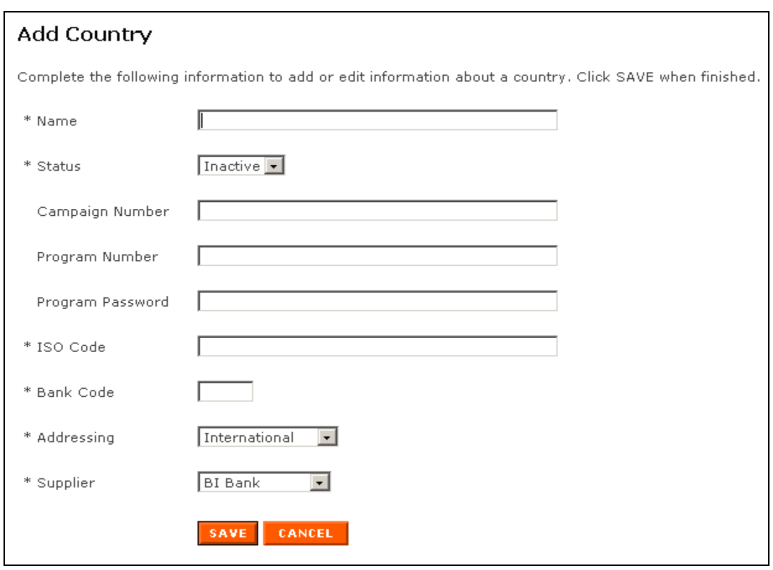
|< < 1 2 > >|

Country	Status	Campaign	Code	Bank Code	Addressing	Supplier
Albania	Inactive	333360	al	ALB	International	BII
Algeria	Inactive	333360	dz	DZA	International	BII
Argentina	Inactive	333360	ar	ARG	International	BII
Australia	Inactive	333360	au	AUS	International	BII
Austria	Inactive	333360	at	AUT	International	BII
Bahrain	Inactive	333360	bh	BHR	International	BII
Belgium	Inactive	333360	be	BEL	International	BII
Brazil	Inactive	333360	br	BRA	International	BII
Canada	Active	333340	ca	CAN	North American	BI Bank
Chile	Inactive	333360	cl	CHL	International	BII

Table 51 – Country List

Field Labels	Description
Country name	Click on a country name to view and edit the information for the selected country.
ADD COUNTRY	Click to add country information such as name, status, ISO code, addressing, supplier, etc.
MANAGE SUPPLIERS	Click to add or edit supplier information.

Add Country



Add Country

Complete the following information to add or edit information about a country. Click SAVE when finished.

- * Name
- * Status: Inactive
- Campaign Number
- Program Number
- Program Password
- * ISO Code
- * Bank Code
- * Addressing: International
- * Supplier: BI Bank

SAVE CANCEL

Table 52 – Add Country

Field Labels	Description
*Name	Enter the name of a country.
*Status	Select whether you want the country to be Inactive or Active for this site.
Campaign Number	If necessary, enter the appropriate Campaign Number. The Campaign Number is assigned by BI for tracking the project and is used for converting dollar amounts into the correct international currency and units.
Program Number	If necessary, enter the appropriate Program Number. The Program Number is a six digit number assigned by BI for tracking purposes.
*ISO Code	International Standardization Organization (ISO) code for 2 letter country name abbreviations. If necessary, also refer to http://www.iso.org.
*Bank Code	Enter the appropriate Bank Code.
*Addressing	Select International or North American addressing. US, Canada, and Mexico default the North American address method; all other countries default to the International address method.
*Supplier	Enter the name of the associated Supplier for AwardperQs items. For example, BI, BII, or Opisa.

* Required Fields

Suppliers

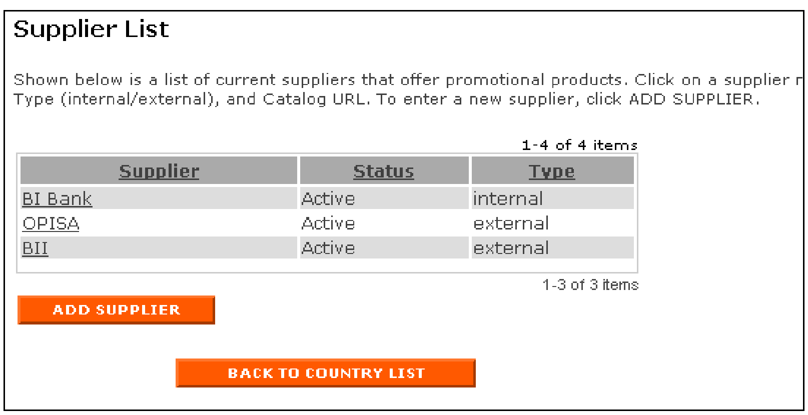


Table 53 – Supplier List

Field Labels	Description
Supplier Name	Click the name of the supplier from which to view and edit supplier data.
ADD SUPPLIER button	Click Add Supplier to add supplier information such as name, status, type, and URL.

Add Supplier

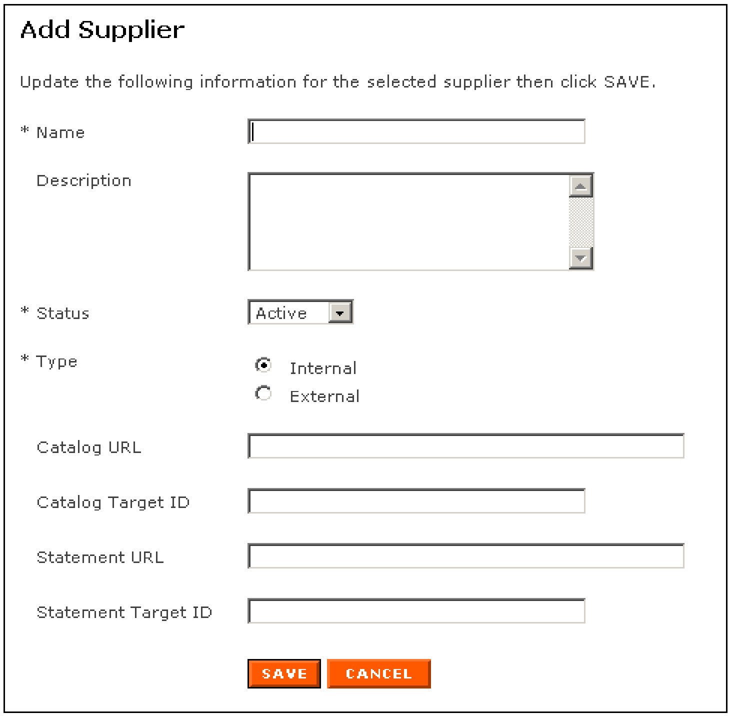


Table 54 – Add Supplier

Field Labels	Description
*Name	Enter the name of the supplier.
Description	Click Add Supplier to add supplier information such as name, status, type, and URL.
*Status	Select Active or Inactive.
*Type	Select Internal or External.
Catalog URL	Enter the URL (Uniform Resource Locator) of the supplier's web site where AwardperQs items are offered.
Statement URL	If a supplier other than BI is used for catalog items, enter their URL for statements.
Statement Target ID	If an outside supplier uses a target ID, enter their URL here.

* Required Fields

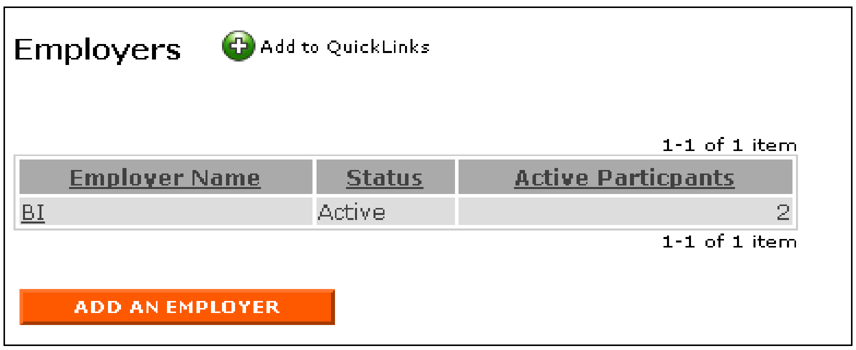
Rules/Considerations

- Name, ISO code and Bank Code are all unique names.
- US, Canada, and Mexico default to the North American addressing method.
- More than one country can be attached to a supplier.

System

Employers

Description	Every participant is associated with an active employer. The System>Employer navigation allows the setup of an employer. Qualified users can create a new, unique, employer record by entering the employer name and other demographic information as needed.
Audience:	User, PAX Administrator, BI Administrator
Prerequisites	Participants are loaded. Hierarchies are set up.



Rules/Considerations

- Only a BI Administrator can read, write, and update employer records.
- The Employer Name and Status are required fields.
- Active is the default for Status.
- Employer records can be inactivated, but not deleted.
- There can be multiple employers active at any given time.
- Optional demographic fields on the *Add Employer* page include:
  - Federal Tax ID
  - State Tax ID
  - Status Reason
  - Address information: Country, Address 1,2,3, City, State, and Postal (which also supports international addresses)

System

File Loads

Description	File Loads provides a faster more convenient method for loading participants, budgets, a hierarchy, and deposits.
Audience:	BI Administrator, User, PAX Administrator. (Typically this function is performed by the BI Administrator after obtaining a file from the client.)
Prerequisites	Prior to loading a file, the following must have been completed:

- a hierarchy must be defined and exist in the database along with node types and Hierarchy name.
- an employer record must be defined.
- picklists must be defined: title, suffix, primary address type, country code, state, and participant characteristics.

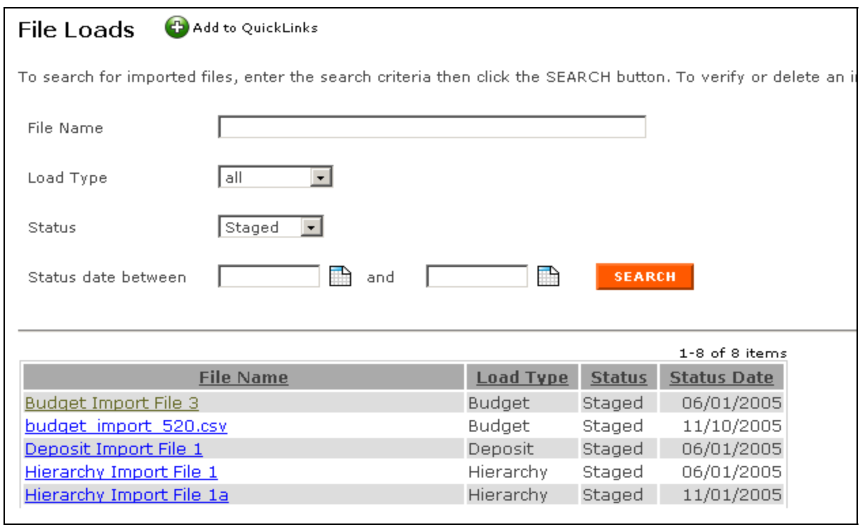


Table 55 – File Loads

Field/Labels	Description
File Name	Enter the file name to upload.
Load Type	Select the type of file you are loading. There are four file types that can be loaded: Budget, Deposit, Hierarchy, and Participant.
Status	Select from the following: All – display a list of all files: imported, stages, and verified. Imported – display a list of only imported files. Staged – display a list of staged files. The load process is first done to a staging area where the user can review the results and then confirm moving of the actual tables. The user can also decide to terminate the file in which case the files are removed from the staging tables. Verified – displays a list of files that were verified. Staged files are verified and any error messages are issued.
Status date between	Select a start and ending date for the files you want listed.

Field/Labels	Description
Search	Click to search for all files indicated in the start and end dates, and list them below.
File Name	Click the file name to: view a file summary and its current status, view the number of records and file contents, view errors, verify the file, delete the file, and other details.

Participant Import File Layout

Field#	Field Label	Data type (chars)	Rules
1	USER_NAME	Text(40)	Required
2	FIRST_NAME	Text(40)	Required
3	MIDDLE_NAME	Text(40)	Optional
4	LAST_NAME	Text(40)	Required
5	SUFFIX	Text(30)	Optional
6	SSN	Text(9)	Optional
7	BIRTH_DATE	Date	Optional
8	GENDER	Text(10)	Optional
9	STATUS	Text(40)	Optional
10	EMAIL_ADDRESS	Text(75)	Optional
11	EMAIL_ADDRESS_TYPE	Text(30)	Optional Values: Home, Business, Mobile, Other SMS
12	TEXT_MESSAGE_ADDRESS	Text(75)	Optional
13	ADDRESS TYPE	Text(30)	Required Values: Home Address, Shipping Address Business Address, Other Address
14	COUNTRY	Text(2)	Required
15	ADDRESS_1	Text(100)	Required
16	ADDRESS_2	Text(100)	Optional if International
17	ADDRESS_3	Text(100)	Optional if International
18	ADDRESS_4	Text(100)	Optional if International
19	ADDRESS_5	Text(100)	Optional if International
20	ADDRESS_6	Text(100)	Optional if International
21	CITY	Text(40)	Required if North America
22	STATE	Text(3)	Required if North America
23	POSTAL CODE	Text(15)	Required if North America
24	PERSONAL_PHONE_NUMBER	Text(30)	Optional
25	BUSINESS_PHONE_NUMBER	Text(30)	Optional
26	CELL_PHONE_NUMBER	Text(30)	Optional
27	EMPLOYER	Text(40)	Optional
28	JOB_POSITION	Text(100)	Optional – Values: Manager Supervisor, Employee, Trainee, Director, President Vice President,

Field#	Field Label	Data type (chars)	Rules
			Coordinator
29	DEPARTMENT	Text(30)	Optional
30	HIRE_DATE	Date	Optional
31	TERMINATION_DATE	Date	Optional
32	NODE1 Name	Text(100)	Required
33	NODE1 Role	Text(100)	Required
34	NODE2 Name	Text(100)	Optional
35	NODE2 Role	Text(100)	Optional
36	NODE3 Name	Text(100)	Optional
37	NODE3 Role	Text(100)	Optional
38	NODE4 Name	Text(100)	Optional
39	NODE4 Role	Text(100)	Optional
40	NODE5 Name	Text(100)	Optional
41	NODE5 Role	Text(100)	Optional
42	CHARACTERISTIC1 Name	Text(100)	Optional
43	CHARACTERISTIC1 VALUES	Text(100)	Optional
44	CHARACTERISTIC2 Name	Text(100)	Optional
45	CHARACTERISTIC2 VALUES	Text(100)	Optional
46	CHARACTERISTIC3 Name	Text(100)	Optional
47	CHARACTERISTIC3 VALUES	Text(100)	Optional
48	CHARACTERISTIC4 Name	Text(100)	Optional
49	CHARACTERISTIC4 VALUES	Text(100)	Optional
50	CHARACTERISTIC5 Name	Text(100)	Optional
51	CHARACTERISTIC5 VALUES	Text(100)	Optional
52	ROLE1 description	Text(100)	Required
53	ROLE2 description	Text(100)	Optional
54	ROLE3 description	Text(100)	Optional
55	ROLE4 description	Text(100)	Optional
56	ROLE5 description	Text(100)	Optional

Hierarchy Import File layout

Field #	Field Label	Data type	Rules
1	Record type (I = insert, U = update, D = delete	Text(1)	Required
2	Node name	Text (100)	Required
3	Old node name	Text(100)	Optional
4	Move to node name	Text(100)	Optional (required if the record type is D and if all participants are moved to an existing node)
5	Description	Text(500)	Optional
6	Node type	Text(40)	Required
7	Parent node name	Text(100)	Required, except for top level
8	Node characteristic1 name	Text(100)	Optional

Field #	Field Label	Data type	Rules
9	Node characteristic1 value	Text(100)	Optional
10	Node characteristic2 name	Text(100)	Optional
11	Node characteristic2 value	Text(100)	Optional
12	Node characteristic3 name	Text(100)	Optional
13	Node characteristic3 value	Text(100)	Optional
14	Node characteristic4 name	Text(100)	Optional
15	Node characteristic4 value	Text(100)	Optional
16	Node characteristic5 name	Text(100)	Optional
17	Node characteristic5 value	Text(100)	Optional

Rules/Considerations - General

- The load process is first done to a staging area where the user can review the results and then confirm moving the actual tables. The user can also decide to terminate the file in which case the files will be removed from the staging tables.
- If there are errors after loading to the staging tables, an email is either sent to the user or a file of failed records is created.
- If there are errors after loading to the actual tables then either an email listing the failed records is sent to the user or a file of failed records is created.
- Use the ETL tool of choice (ADC or other tool) to set up the file template and the validations it needs to do before moving the file to the BI network.
- The file name and its location is a system variable defined during system definition.
- Emails are sent after successfully loading a file (both during the staging and loading), or upon any file load failures.
- The administrator can cancel the load after the staging process is done.
- The database keeps track of the file name, file load date and statistics for later review.
- The password and SSN are encrypted in the database.
- The File Load process can handle both adding and updating of participants.
- If a participant already exists, the program allows the administrator to remove, change, and add nodes and characteristics that are attached to the participant.
- The administrator can view either all records in the staging table or only error records.
- Types of errors generated include:
  - Duplicate SSN
  - Duplicate user ID
  - Termination date on a new participant record
  - Missing hierarchy assignments
  - Missing required fields
  - Change of country (across suppliers)
- Pre-Requisite: Node types must be added manually through the application before loading a hierarchy file.

- Each file creates or updates one unique hierarchy.
- The user should specify if they are creating or updating a hierarchy.
- No two hierarchies can reference each other's node.
- A node can be attached to only one parent node.
- Node and hierarchy names must be unique.
- There must be a separate file for each hierarchy load.
- The load process is first done to a staging area where the user can review the results and then move it to the actual tables. The user can also decide to terminate the file, in which case the files are removed from the staging location.
- Use ADC to set up the file template and the validations it needs to before moving the file to the staging area.
- The file name and the place to pick up the file are stored in system variables.
- Emails are sent after a successful load or on any failures.
- Updates to the hierarchy can be maintained through file loads.
- A history of hierarchy updates is stored.

Rules/Considerations – Hierarchy Changes Using File Load

- When updating an existing hierarchy, the user is provided with a list of existing hierarchy names in order to choose the one for updating.
- Required fields when updating include: hierarchy name, type (primary/secondary), node name, description, node type, status and master node. (Master node *is not* required for the top level node)
- Updates to an existing hierarchy will only allow addition of new nodes/branches. You will not be able to delete existing structure.
- The record type determines what action needs to be performed.
- When changing the node name, new and old node names are required.
- To add a new node, record type = I (old name is not provided).
- To change the node parent, record type = U (replaces the existing parent).
- To add or change a node characteristic value, record type = U. The characteristic name and value must be supplied in the file. All characteristics in the existing file will be replaced with the values in the upload file.
- To delete a node with no participant or user attached to it and no child nodes, record type = D.
- To delete a node where all participants and users are moved to an existing node, record type = D.
- If the existing node where the participants and users are moved already have a node owner then the node owner of the deleted node will be made a member of that node. Otherwise, the node owner of the deleted node will become the node owner of the existing node.

- Changing the node type of a node and deleting a node, containing participants and users, must be performed manually; it cannot be performed using file loads.
- The following scenarios will cause a failure during the validation process:
  - If the record type is U and the node name doesn’t exist in the database.
  - If the record type is U and the old name doesn’t exist in the database.
  - If the record type is U or I and the characteristic name doesn’t exist in the database.
  - If the record type is U or I and if the characteristic is defined as required and the value is blank or not supplied.
  - If the record type is D and the node name doesn’t exist in the database.
  - If the record type is D and the move to the node name doesn’t exist in the database.
  - If the record type is I, U, or D and the node type doesn’t exist in the database.
  - If the record type is I or U and the parent node name doesn’t exist in the database.

System

Form Library

Description

The Form Library enables a user to create, view, and update claim forms. Claim forms are defined by the promotion/module type they are used in: Recognition, Product Claims, and Quizzes.

A claim is an activity or "claim" recorded by a participant that identifies what activity was performed as part of a promotion, resulting in qualification for various AwardperQs.

Audience: User, BI Administrator, PAX Administrator

Prerequisites Prior to a participant submitting a claim:

- a claim form must exist
- products and product categories must exist
- product claim promotions must exist

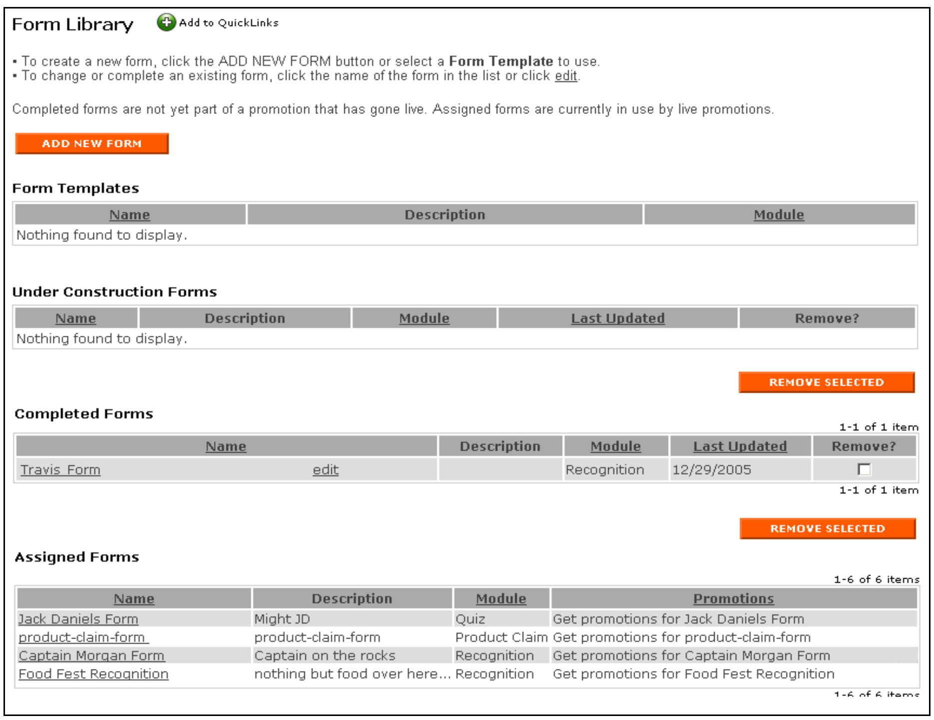


Table 56 - Form Library

Field/Labels	Description
ADD NEW FORM button	Click to create a new claim form.
Form Templates	Five different types of claim form templates are standard with the Platform. Use the templates for creating new types of forms.
Under Construction Forms	Incomplete forms that *have not* been marked as complete and require additional entries.
Completed Forms	Claim forms that are complete (the MARK AS COMPLETE button was clicked), but the promotion they are assigned to has not gone live.

Field/Labels	Description
Assigned Forms	Forms that have been completed and are assigned to a promotion type. The promotion start date may or may not have begun yet.

Add Form

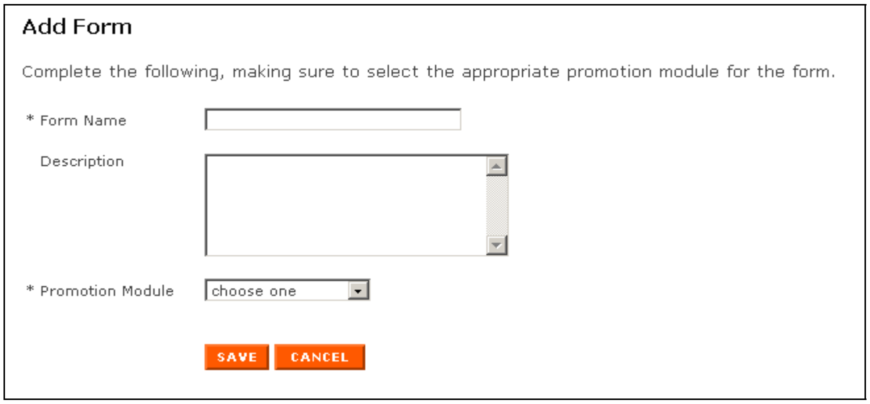


Table 57 – Add Form

Field/Labels	Description
*Form Name	Enter a name for the form. The name must be unique.
Description	Enter a brief description of the form you are creating.
*Promotion Module	Select the promotion module for which the form will be used.

* Required Fields

View Form

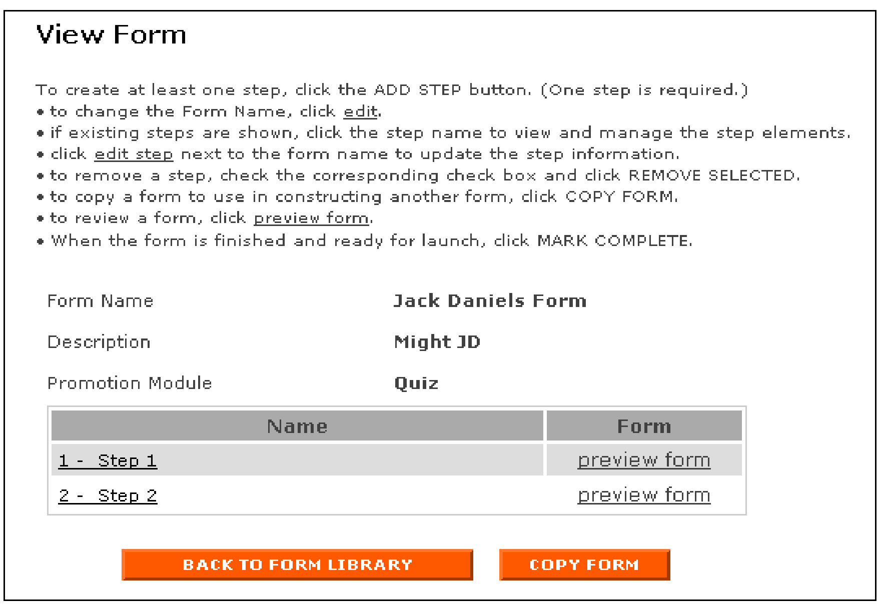


Table 58 – View Form

Field/Labels	Description
Form Name *edit	Click edit to change the form name or apply a different promotion module to the form.
Description	Displays the description of the form.
Module	Displays the promotion module to which the form is assigned.
*Step(s)	If no step is defined, click the ADD STEP button to add elements (fields, labels, copy, etc.) to the form. If existing steps are shown, perform one of the following: • Click the step label to manage step elements. • Click edit step information to update step elements. • To remove a step, check the corresponding check box and click Remove Selected. • If necessary, click edit to change the Form Name. • To copy a form to use in constructing another form, click Copy Form. • To preview a form, click preview form. • **Important**: When the form is finished and ready to launch with a promotion, click Mark Complete.

* Required Fields

View Step

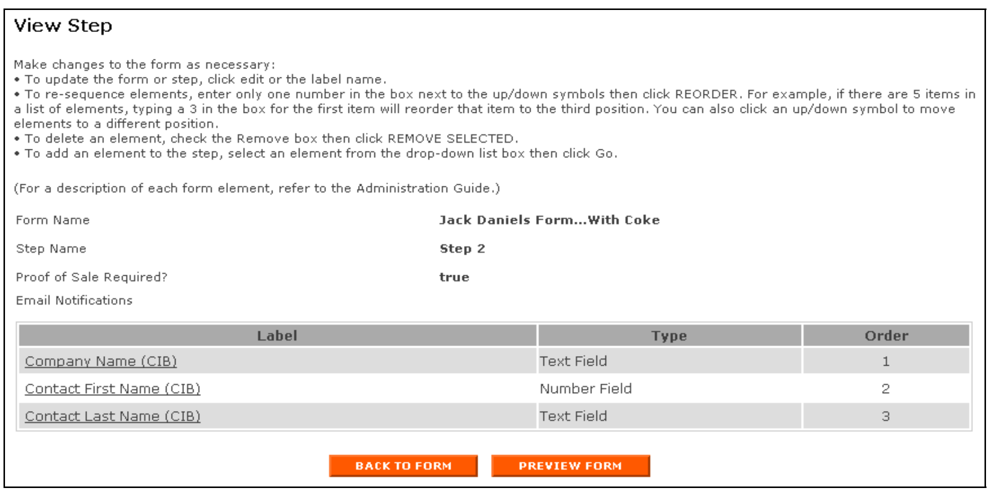
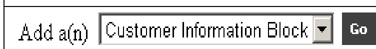


Table 59 – View Step

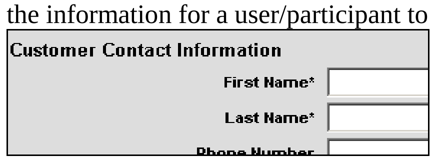
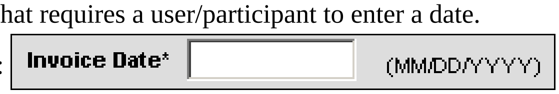
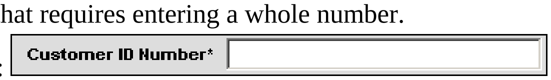
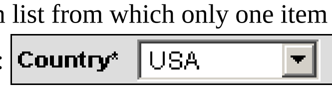
Field/Labels	Description
Form Name edit form	Click edit form to change the form name or apply a different promotion module to the form.
Step Name edit step	Displays the name of the step. Click edit step to make changes to Step Name, Proof of Sale option, and Email Notifications.
Proof of Sale Required	Displays the current option selected for Proof of Sale requirement.
Email Notifications	Displays the current options that were selected for the approver and the participant when email notifications are sent.
Label	Displays the name of the label for the step element.

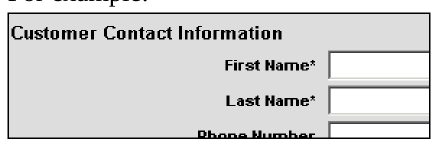
Field/Labels	Description
Type	Displays the type of element (text, Boolean, Date, Number, etc.)
Order	Displays the current order of elements on the form.
	Click the up or down symbol to move an element up or down in the sequence of elements that appear on the form.
[ ] Reorder	To re-sequence elements, enter only one number at a time for one element then click the REORDER button. For example, if there are four items shown, enter a 3 in the box for the first item to reorder the first item to the third position.
Remove?	Check the Remove? box for the appropriate element you want to delete then click Remove Selected.
	To add an element to the form, select an element from the drop-down list box, then click GO. For more information, refer to following description of form elements.

Form Elements

An element is an item or field and its label that appears on a web page or form. Different types of elements include: Boolean, Date, Integer, Number, Multi-select, Single Select, Copy block, or Text.

Table 60 – Form elements

Form Element	Description
Boolean	Boolean logic is an expression that results in a value of either True or False. An element that appears in a form may include a Yes/No, True/False, On/Off type of selection. For example: 
Customer Information Block	The Customer Information Block identifies basic information about the customer enabling you to specify all, some, or none of the information for a user/participant to enter. For example: 
Date	An element that requires a user/participant to enter a date. For example: 
Integer	An element that requires entering a whole number. For example: 
Number Field	An element that requires entering a number with or without decimal positions, masking, uniqueness, and encryption.
Multiple Selection	A list of items in which one or more items can be selected.
Single Selection	A drop-down list from which only one item can be selected. For example: 
Copy Block	Any text that appears on the form that does not require an entry. For example, specific directions, descriptions, or explanations may need to appear on the form.

Form Element	Description
Text Field	An element that requires the entry of text. You can specify an alphanumeric, email, normal, numeric only, or phone number format. Also masking, uniqueness based on node, node type and hierarchy, and encryption can be chosen.
Text Box	An element that requires entry of text. You can specify an alphanumeric, email, normal, numeric only, or phone number format. For example: 
Button	Requires the use of JavaScript. This is a custom feature that requires special programming. Contact your BI Development Team member.
Link	An element that places a link to a URL.
Section Heading	A section heading placed on the form. For example: 

Rules/Considerations

- Default claim form templates are provided that users can start with and customize.
- For Product Claims, the Address Book feature will store and retrieve defined customer information.
- The Customer Information block is static, with modifications to field labels only. These fields are pre-defined.
- If a claim form is assigned to a promotion (or multiple promotions) that never go live, and all of the promotion(s) are deleted, then the status of the claim form is changed back to Completed, rather than remaining at a status of Assigned.
- To preview a claim form, the first Claim Form Step must have at least one Claim Form Step element.

See Also

- Step 2—Create a Claim Form (Promotions)

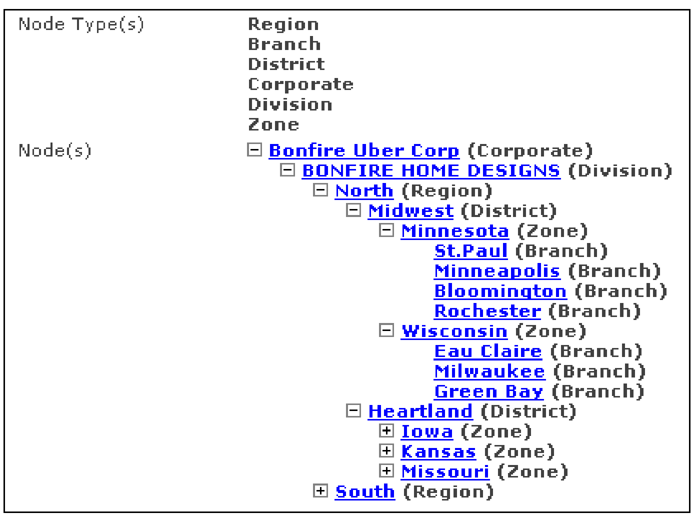
System

Hierarchy Management

Description	Hierarchies (tree-like structures) define how an entity is organized. An organizational hierarchy is one example but not necessarily the only one. You establish a hierarchy within the Platform in order to define access control, reports, approvals, and for use in list builder.
Audience:	User, BI Administrator, PAX Administrator
Prerequisites:	Plan ahead by manually laying out the hierarchy before using the Platform. This includes identifying all node types, nodes, and node type characteristics. You may want to define the node types within the application before entering the primary node.

NOTE: Manually add the hierarchy name and its associated node types through the application before loading a hierarchy file. (Refer to File Loads on page 129.)

Node types within the hierarchy identify positions or divisions assigned within the hierarchy. For example, the Bonfire Uber Corporation includes six different node types: Corporate, Division, Region, District, Zone, and Branch. Each node type includes a different node such as Bonfire Home Designs, North, Midwest, etc. Shown below is an example of a hierarchy for the Bonfire Uber Corporation, which is the primary node.



A hierarchy is established in order to define:

- access control
- reports (each report designates which hierarchy is used)
- list builder
- approvals

For example, setting up a hierarchy for your project is helpful in creating lists. You may need to create a list of participants (an audience) for a promotion that includes all those in the Minnesota zone and below. As a result, the list would exclude the Wisconsin zone and the entire Heartland district and South region. Likewise, a list that included the Minnesota zone and above would exclude Wisconsin but include all of the remaining participants in the Bonfire Home Design Division.

Hierarchies

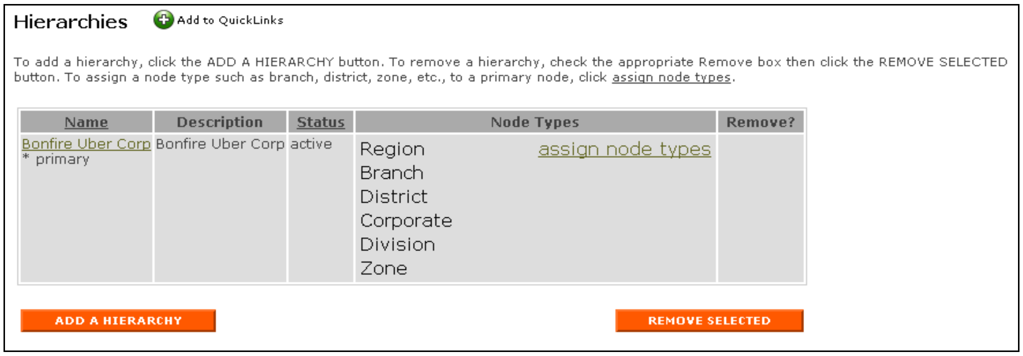


Table 61 - Hierarchies

Form Element	Description
Hierarchy Name	Click the name of the hierarchy to edit or view the hierarchy structure.
assign node types	Click to enter or edit node types. **NOTE**: You can also define node types by clicking the System tab and selecting Hierarchy Node Types from the menu.
ADD A HIERARCHY button	Click to add a Hierarchy. One or more hierarchies may already be defined. Only one primary hierarchy can exist at a time.
REMOVE SELECTED	To delete a hierarchy, check the appropriate Remove? box then click Remove Selected.

Add Hierarchy

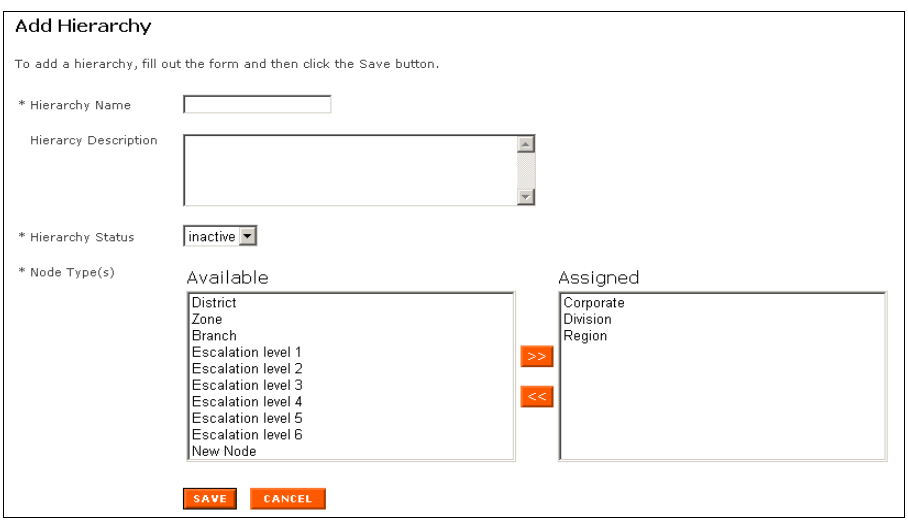


Table 62 – Add Hierarchy

Form Element	Description
*Hierarchy Name	Enter the name of the hierarchy.
Hierarchy Description	Enter a description of the hierarchy.
*Primary Hierarchy?	Select Yes or No if this is the primary hierarchy. Only one primary hierarchy can exist at a time. This field does not appear if a primary hierarchy has already been defined.
*Hierarchy Status	Select whether this hierarchy is active or inactive.
*Node Type(s)	Select the node types you want assigned then click the >> button to assign them to the hierarchy you are defining. To remove a node type from the Assigned list, click <<. NOTE: If no node types are listed, click on the System tab and select Hierarchy Node Types to define new node types.

* Required Fields

View Hierarchy

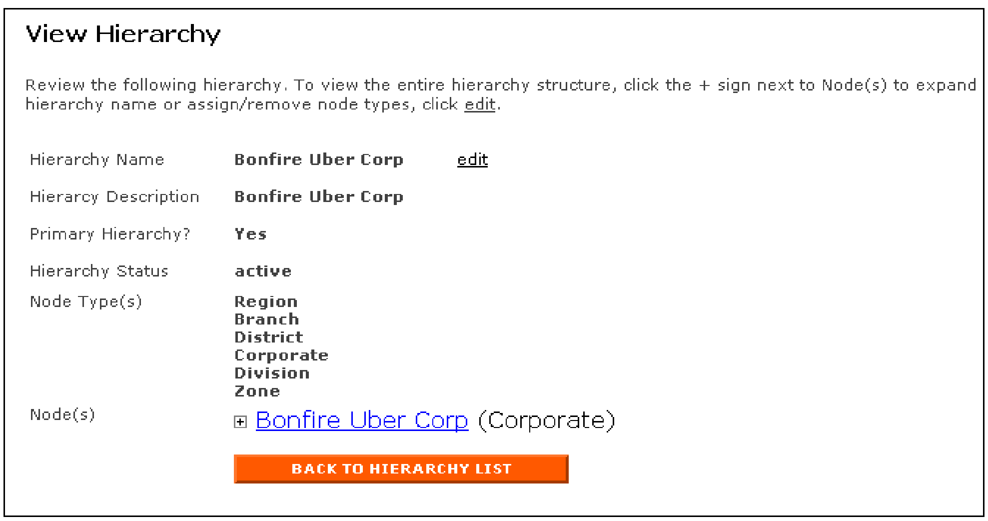


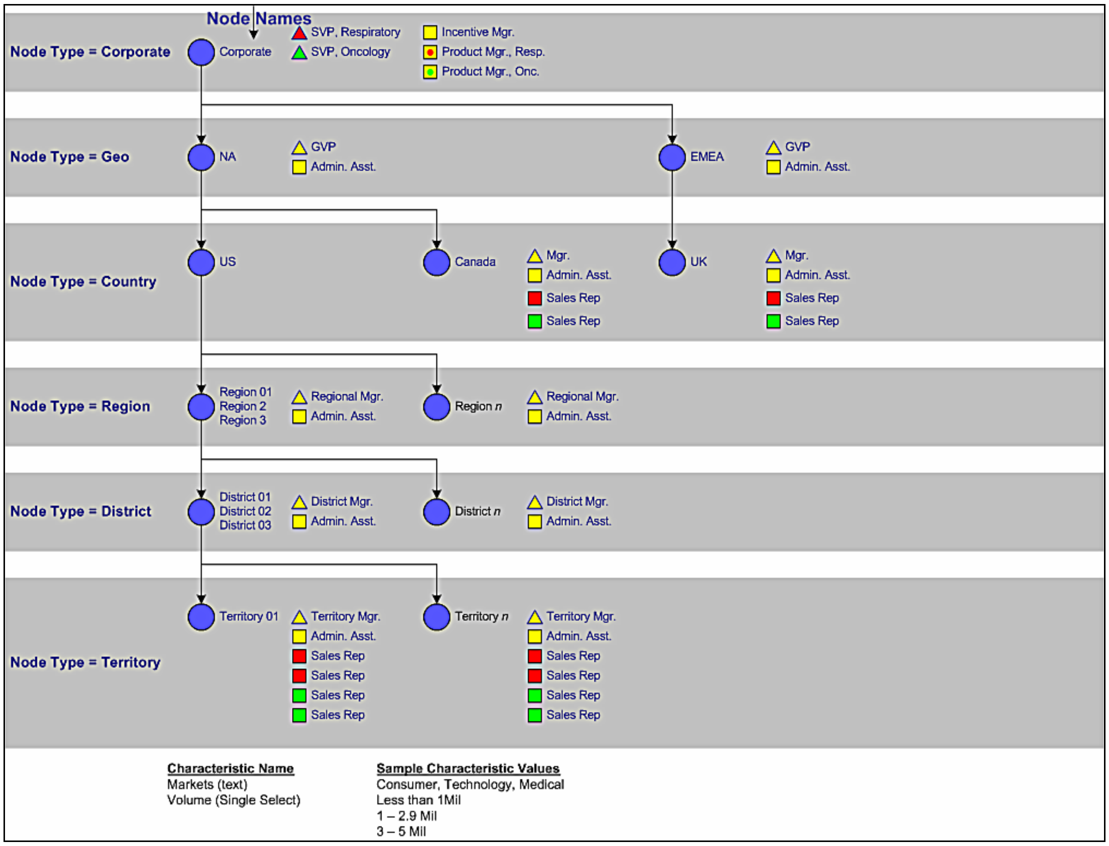
Table 63 – View Hierarchy

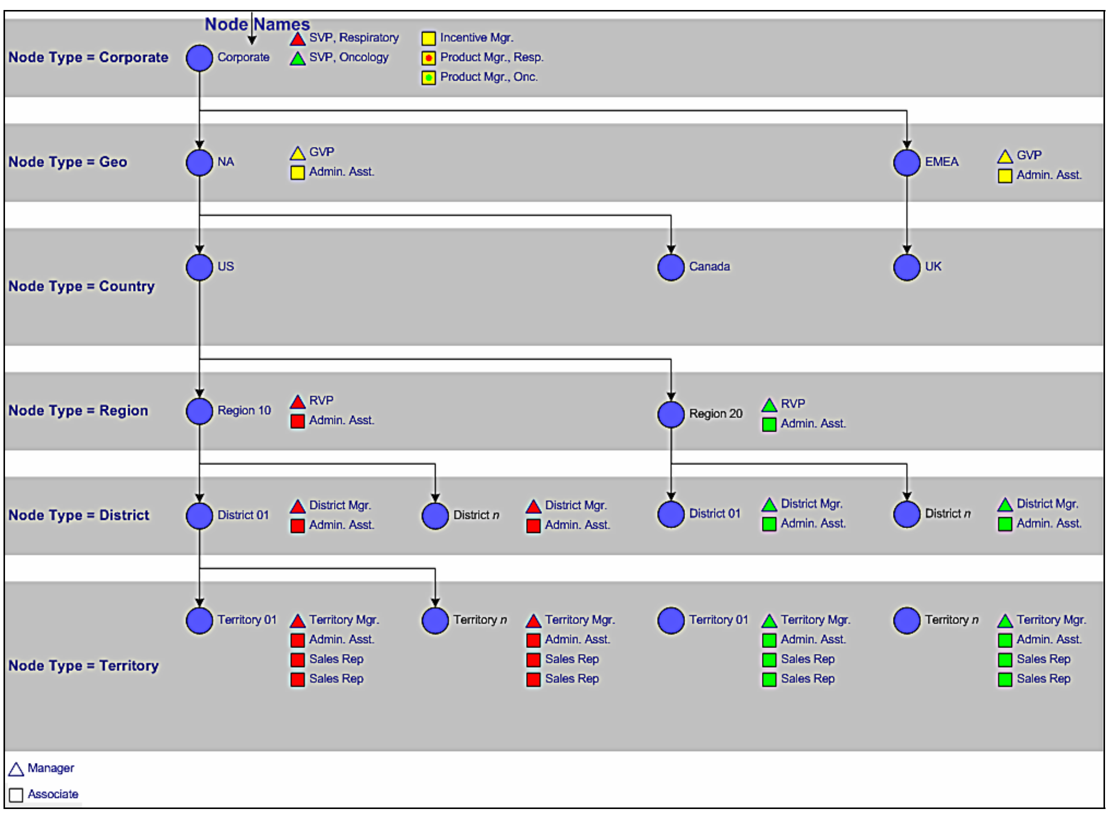
Form Element	Description
Hierarchy Name edit	Displays the name of the Hierarchy. Click edit to change the Hierarchy name, description, and status, and assign node types.
Hierarchy Description	Displays a description of the hierarchy.
Primary Hierarchy?	Identifies whether the hierarchy is the primary hierarchy.
Hierarchy Status	Displays whether the hierarchy is active or inactive.
Node Type(s)	Displays the current, active nodes for this hierarchy.
Node(s)	Click + to drill down and expand and view the hierarchy and node structure.

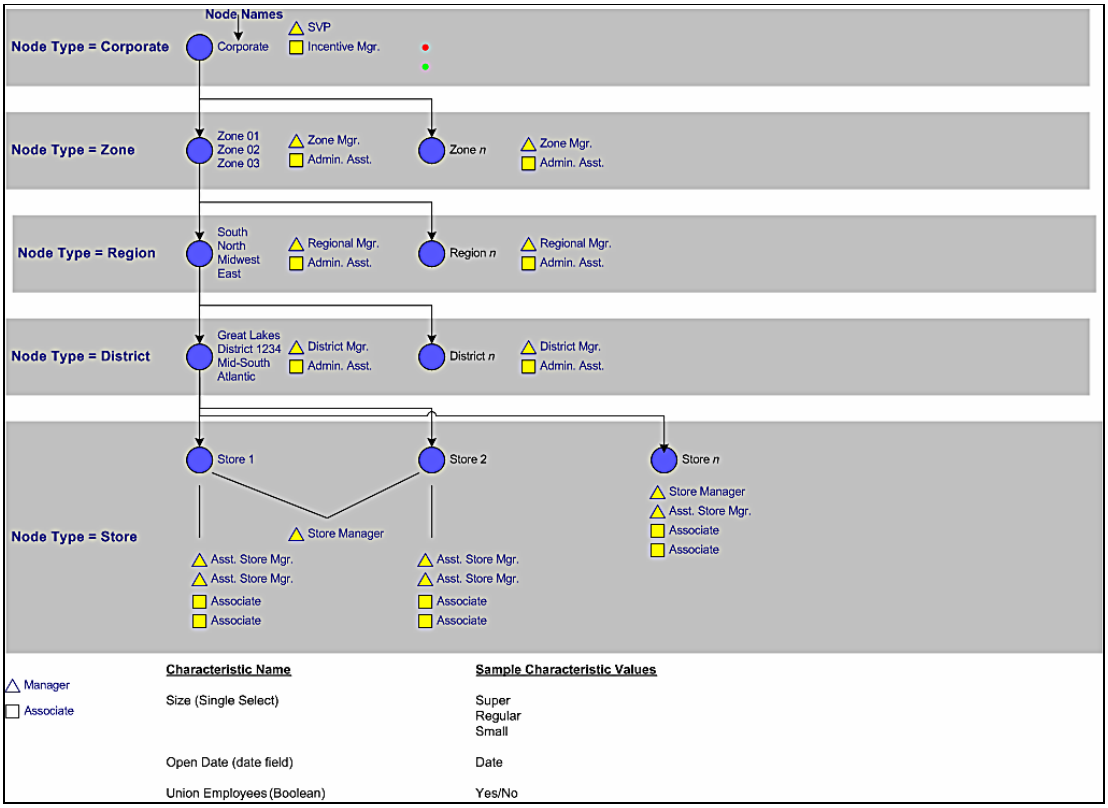
Rules/Considerations

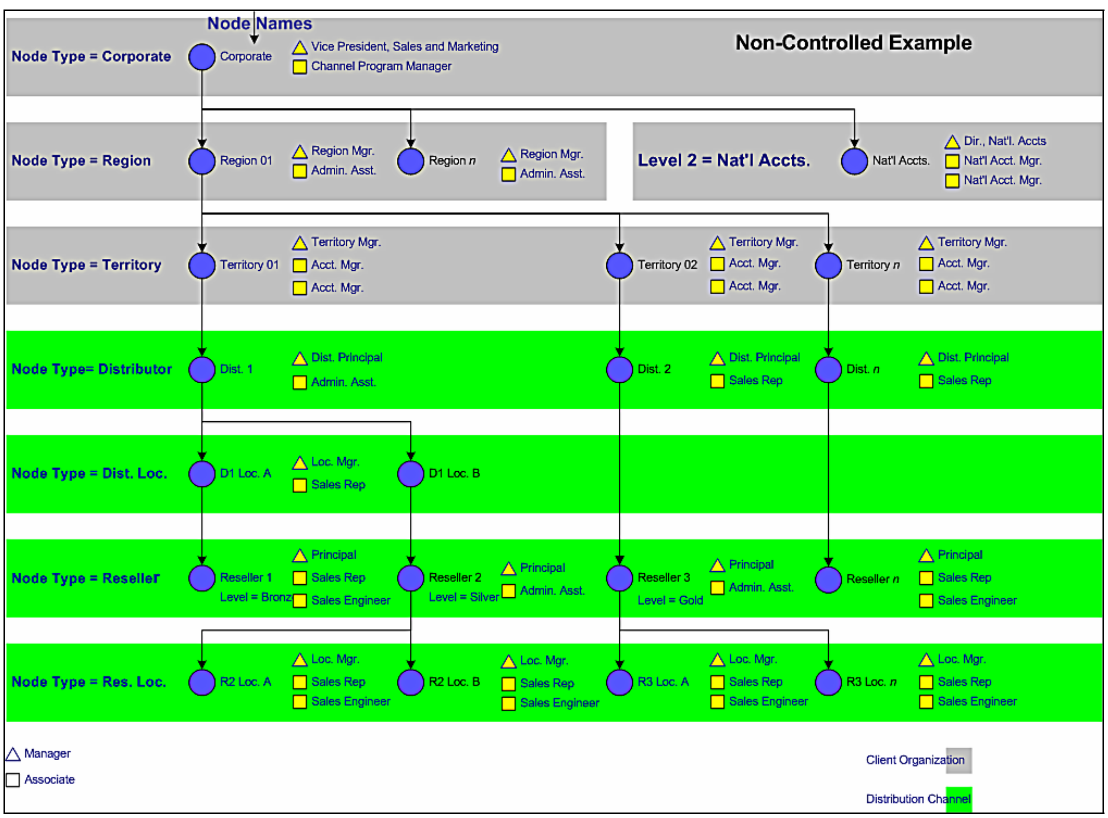
- The system allows multiple hierarchies that are independent of each other.
- Each hierarchy can have multiple levels.
- The system has the ability to create custom defined labels (multi-lingual) for the levels and nodes of a hierarchy.
- A participant can be attached to multiple hierarchies.
- A participant can be attached to more than one node in a hierarchy.
- More than one participant can be attached to each node of a hierarchy.
- There is a minimum of one owner for a node.
- The system can skip levels within a hierarchy.
- No two hierarchies can reference each other.
- A separate file for each hierarchy is not allowed.
- A hierarchy is used for:
  - access control
  - reports (each report designates which hierarchy is used)
  - list builder
  - approvals
- The user can maintain updates to a hierarchy.
- The system can store a history of hierarchy updates.
- Need multiple node attributes and custom defined labels for the attributes.
- Enrollment reports ignore duplicates if a participant is attached to multiple nodes.

Example Hierarchies






Node Names
Node Type = Corporate
Corporate
SVP
Incentive Mgr.
Node Type = Zone
Zone 01
Zone 02
Zone 03
Zone Mgr.
Admin. Asst.
Zone n
Zone Mgr.
Admin. Asst.
Node Type = Region
South
North
Midwest
East
Regional Mgr.
Admin. Asst.
Region n
Regional Mgr.
Admin. Asst.
Node Type = District
Great Lakes
District 1234
Mid-South
Atlantic
District Mgr.
Admin. Asst.
District n
District Mgr.
Admin. Asst.
Node Type = Store
Store 1
Store 2
Store n
Store Manager
Asst. Store Mgr.
Associate
Associate
Store Manager
Asst. Store Mgr.
Asst. Store Mgr.
Associate
Associate
Asst. Store Mgr.
Asst. Store Mgr.
Associate
Associate
Manager
Associate
Characteristic Name
Sample Characteristic Values
Size (Single Select)
Super
Regular
Small
Open Date (date field)
Date
Union Employees (Boolean)
Yes/No


Node Names
Non-Controlled Example
Node Type = Corporate
Corporate
Vice President, Sales and Marketing
Channel Program Manager
Node Type = Region
Region 01
Region Mgr.
Admin. Asst.
Region n
Region Mgr.
Admin. Asst.
Level 2 = Nat'l Accts.
Nat'l Accts.
Dir., Nat'l. Accts
Nat'l Acct. Mgr.
Nat'l Acct. Mgr.
Node Type = Territory
Territory 01
Territory Mgr.
Acct. Mgr.
Acct. Mgr.
Territory 02
Territory Mgr.
Acct. Mgr.
Acct. Mgr.
Territory n
Territory Mgr.
Acct. Mgr.
Acct. Mgr.
Node Type= Distributor
Dist. 1
Dist. Principal
Admin. Asst.
Dist. 2
Dist. Principal
Sales Rep
Dist. n
Dist. Principal
Sales Rep
Node Type = Dist. Loc.
D1 Loc. A
Loc. Mgr.
Sales Rep
D1 Loc. B
Node Type = Reseller
Reseller 1
Level = Bronze
Principal
Sales Rep
Sales Engineer
Reseller 2
Level = Silver
Principal
Admin. Asst.
Reseller 3
Level = Gold
Principal
Admin. Asst.
Reseller n
Principal
Sales Rep
Sales Engineer
Node Type = Res. Loc.
R2 Loc. A
Loc. Mgr.
Sales Rep
Sales Engineer
R2 Loc. B
Loc. Mgr.
Sales Rep
Sales Engineer
R3 Loc. A
Loc. Mgr.
Sales Rep
Sales Engineer
R3 Loc. n
Loc. Mgr.
Sales Rep
Sales Engineer
Manager
Associate
Client Organization
Distribution Channel

System

Hierarchy Node Types

Description	Node Types are a grouping of nodes of similar types.
Audience:	User, BI Administrator, PAX Administrator

Node Types

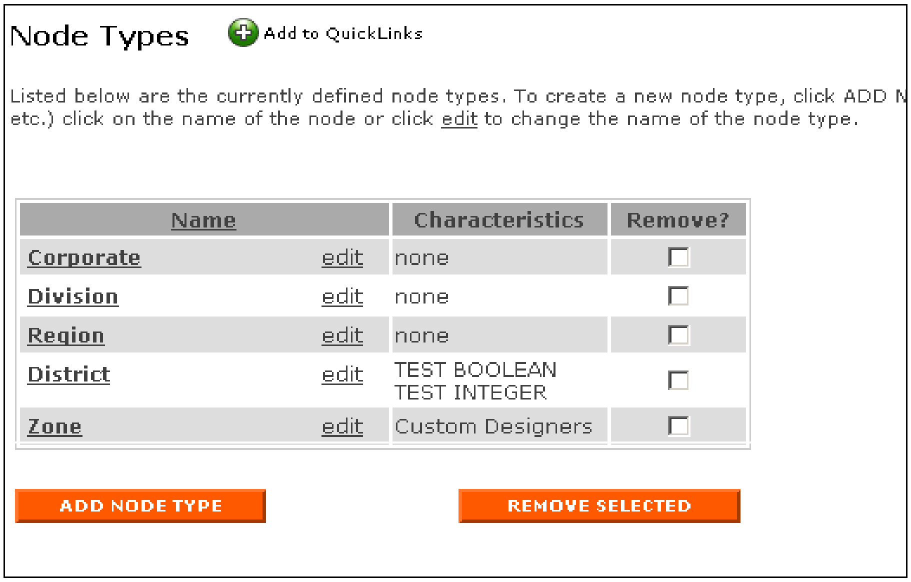


Table 64 – Node Types

Form Element	Description
Node type name	Click the name of the node type to add a node type characteristic: Boolean, Date, Decimal, Integer, Multi Select List, Single Select List, and Text.
edit	Click edit to change the node type name.
Characteristics	Displays the characteristic type (i.e., Boolean, integer, date, etc.) that was defined.
Remove?	To delete a node type, check the appropriate box then click Remove Selected.
ADD NODE TYPE button	Click this button to create a new Node Type.
REMOVE SELECTED	To delete a node type, check the appropriate box then click Remove Selected.

Add Node Type

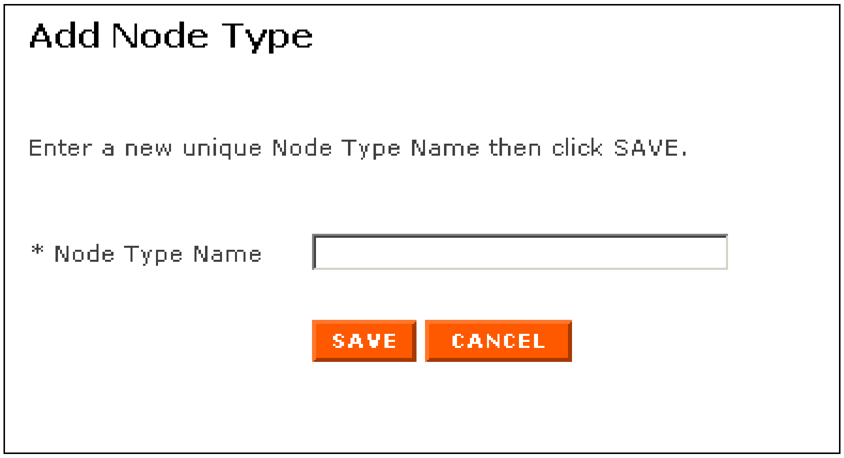


Table 65 – Add Node Type

Form Element	Description
*Node type name	Enter a name for the node type. To add additional characteristics to the node type, click SAVE to return to the *Node Types* page. From that page you can click the Node Type name to add characteristics of the node (Boolean, Integer, Date, Single Select List, etc.). For example, the Store Type (Single Select List), Employee Count (Integer), and Union Member (Boolean). (Refer to the View Node Type descriptions that follow.

View Node Type

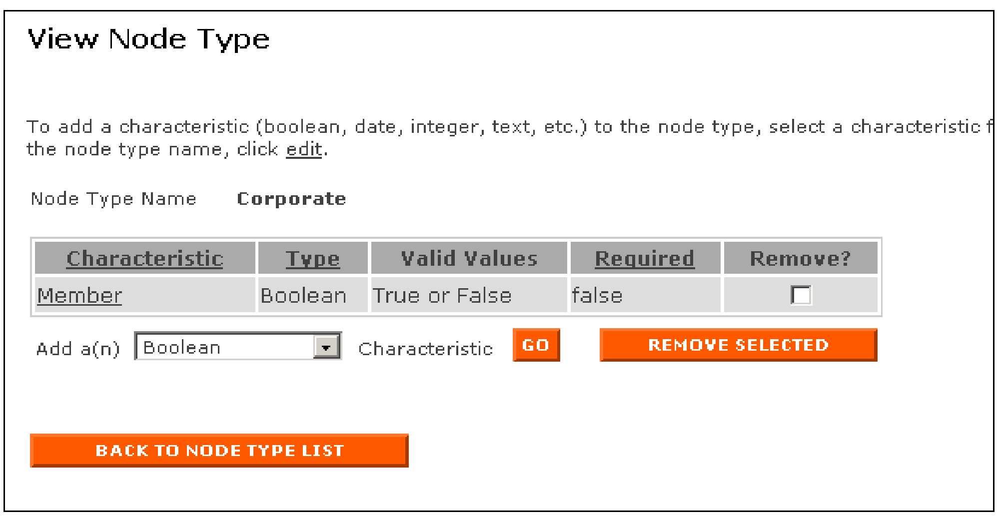


Table 66 – View Node Type

Form Element	Description
Characteristic name	Click the name of the characteristic to change the characteristic name, description and other attributes.
Remove?	To delete the node type characteristic, check the appropriate Remove? box then click Remove Selected.
Add a(n) ______ Characteristic GO button	To add a characteristic, first select a field type from the drop-down list then click Go. Characteristic node types include: Boolean, Integer, Date, Decimal, Multi Select, Single Select, or Text. For a description of characteristic node types refer to Table 60 on page 138.
REMOVE SELECTED	To delete the node type characteristic, check the appropriate Remove? box then click Remove Selected.

Rules/Considerations

- Node types are stored separately from the hierarchy so that they can be reused.
- Node types must be defined before defining nodes (node names).
- The system has the capability to create custom defined labels for the node types of a hierarchy. This is used for display and reporting purposes.
- Ability to create multiple characteristics (attributes) and custom defined labels for each characteristic. A Node type can have up to five characteristics.
- Characteristics can be an integer, decimal, Boolean, date, single select list and multi-select list.

System

Home Page Setup

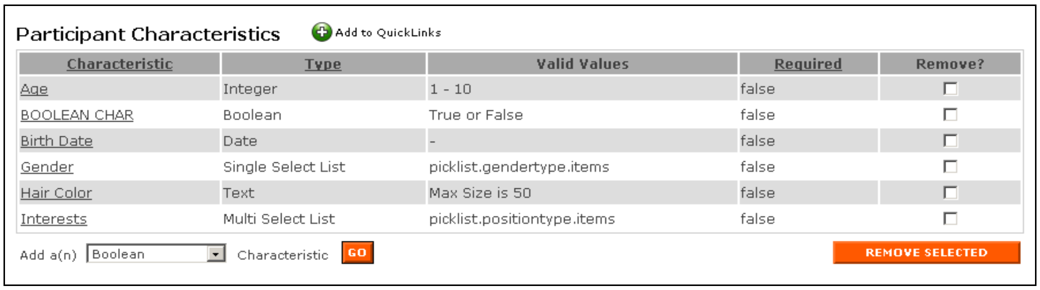
Description:	Defines what is displayed in the left and right rails of the Home page. For example, you may want My Activities to appear in the left rail and My Goal to appear in the right rail, and all banner ads to appear at the bottom of both rails
User type:	User, PAX Administrator, BI Administrator
Access:	System->Home Page Setup

For additional information that describes how to set up layout of the home page, refer to Setting Up the Home Page on page 49.

System

Participant Characteristics

Description:	Defines specific characteristics about participants and users, such as their age, certifications, gender, interests and so forth. Typically, these characteristics are seen on the *Add New Participant* page.
User type:	User, PAX Administrator, BI Administrator
Access:	System->Participant Characteristics



Participant Characteristics   Add to QuickLinks

Characteristic	Type	Valid Values	Required	Remove?
Age	Integer	1 - 10	false	☐
BOOLEAN CHAR	Boolean	True or False	false	☐
Birth Date	Date	-	false	☐
Gender	Single Select List	picklist.gendertype.items	false	☐
Hair Color	Text	Max Size is 50	false	☐
Interests	Multi Select List	picklist.positiontype.items	false	☐

Add a(n) Boolean Characteristic GO   REMOVE SELECTED

Table 67 – User Characteristics

Field Labels	Description
Add a(n) ______ Characteristic GO button	To add a characteristic, first select a field type from the drop-down list then click Go. File types include: Boolean, Integer, Date, Decimal, Multi Select, Single Select, or Text. For a description of characteristic field types refer to the following table.
REMOVE SELECTED button	Check the appropriate Remove? box then click Remove Selected to delete the selected characteristic.

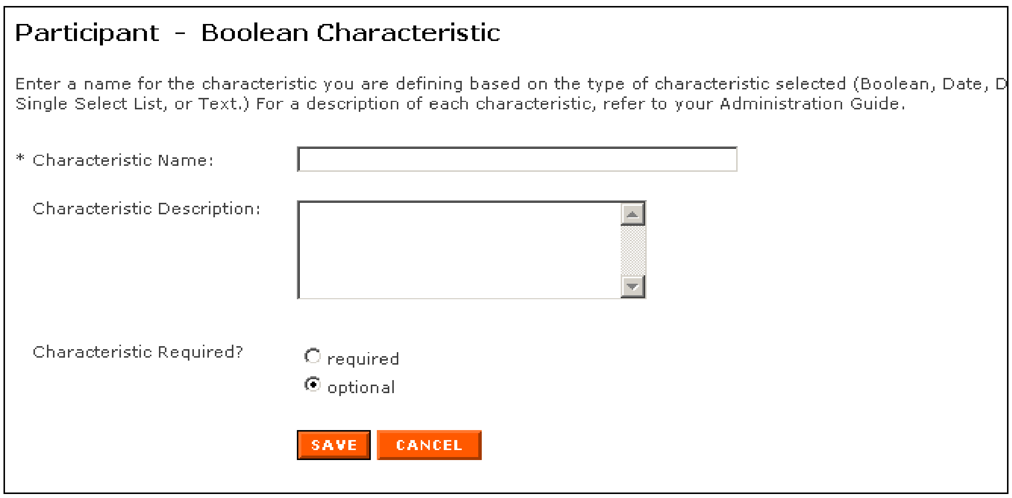
The following table describes the different types of fields.

Table 68 – Participant Characteristic Types

Characteristic field types	Unique fields
Boolean	Entry is based on what was originally set up by the site administrator. Examples of a Boolean field type may include data that requires a Yes/No, True/False, or On/Off type of selection. For example, the characteristic Union Member, which requires a Yes/No response is a Boolean field type.
Date	Valid Date Range - Start: Valid Date Range – End:
Decimal	Minimum Value Maximum Value
Integer	Minimum Value Maximum Value
Multi Select List	Multi Select Lists allow a user/participant to select one or more items from a drop-down list box or series of items listed next to

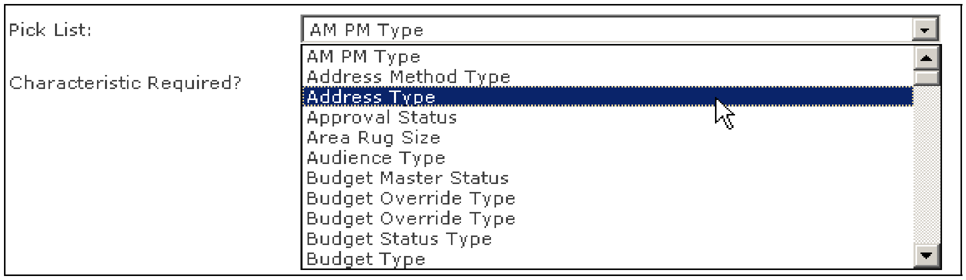
Characteristic field types	Unique fields
	an option button. Examples might include: Address Method Type, Approval Status, Budget Status, Certifications.
Single Select List	Single Select Lists allow a user/participant to select only one item from a drop-down list box. Examples might include: Address Method Type, Approval Status, Budget Status, Certifications.
Text	Maximum Size. (Indicate the total maximum number of characters that can be entered in a text box. The maximum number of characters can be more than the display size.)

Participant Characteristics



Field Label	Description
*Characteristic Name:	Enter a unique name for the characteristic. For example, a rug may be a product within the category of Floor Coverings. A characteristic of the rug is the rug size (Characteristic Name), which could come in sizes 6x4, 8x12, or 10x16. The rug size is a characteristic that would appear in a Single Select List (drop-down list box). For additional information about characteristic types, refer to Table 68 on page 150.
Characteristic Description:	Enter a description for the characteristic you created.
Characteristic Required?	Indicate if the characteristic is required or optional.

NOTE: Each characteristic type page has similar information to complete. Multi Select List and Single Select List show a Picklist field from which you can choose what item(s) to show in the drop-down list.



System

Processes

Description:	The Process function enables users to view and edit specific program processes that are currently active and scheduled to run. Processes that can be scheduled include: enrollment, participant updates, deposit, payouts, statements, emails, comm logs, manager overrides, messages, and delayed approvals.
User type:	User, PAX Administrator, BI Administrator
Access:	System->Processes

Processes

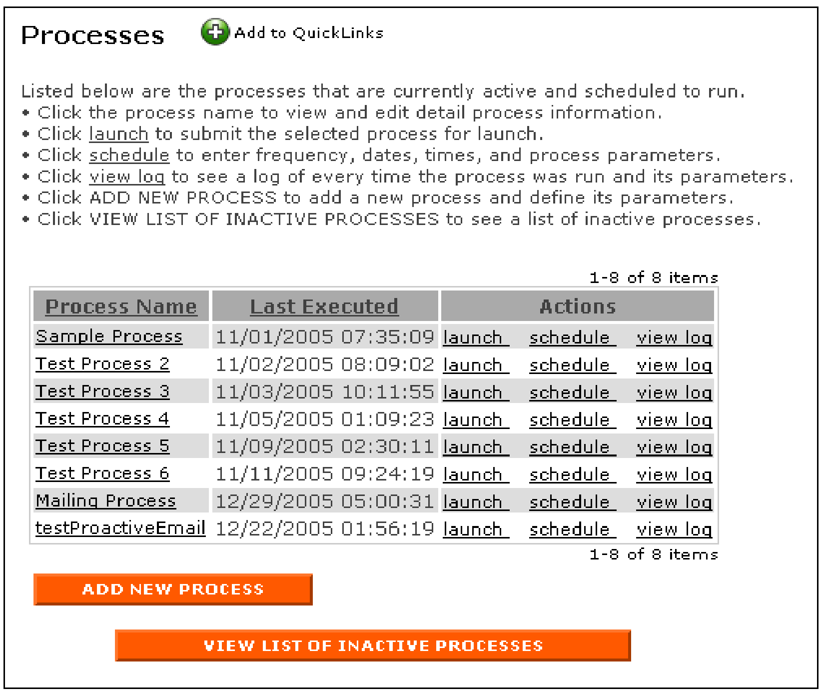


Table 69 - Processes

Field Labels	Description
Process Name	Click to view and edit the process detail information such as process name, program name, and security permissions.
Last Executed	Displays the date and time the process was last executed.
Actions launch schedule view log	Click launch to submit the selected process for launch. Click schedule to enter frequency, dates, times, and process parameters. Click view log to see a log of every time the process was run and its parameters.
ADD NEW PROCESS button	Click to add a new process and define its parameters.

VIEW LIST OF INACTIVE PROCESSES button	Click to view a list of inactive processes.

Process Detail

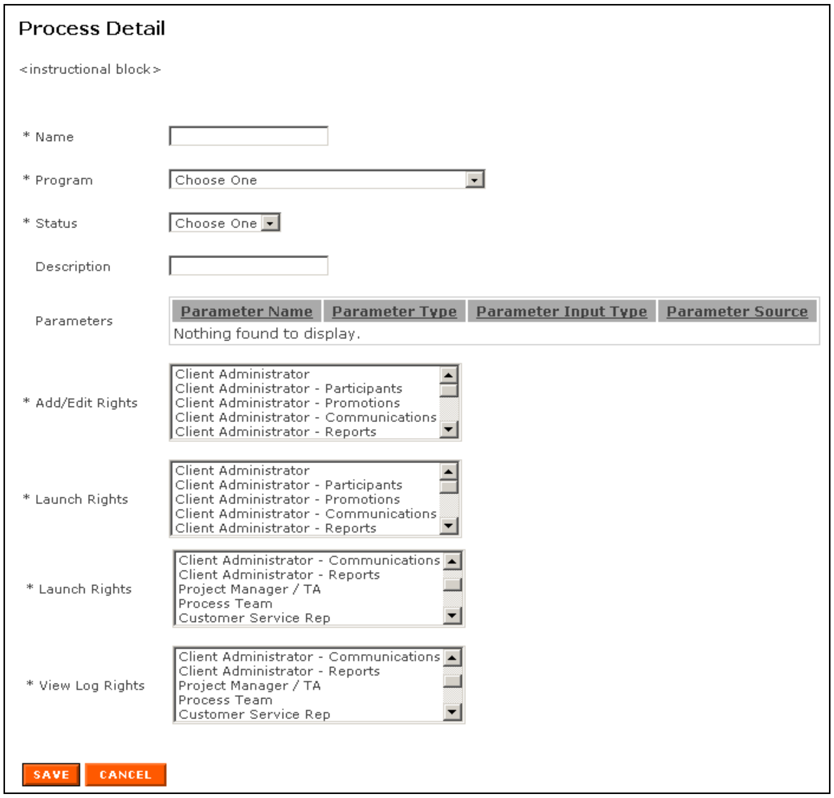


Table 70 – Process Detail

Field Labels	**Description**
*Name	Enter a unique name for the process you want to add.
*Program	Select a process to run from the drop-down list box.
*Status	Select whether you want the process to be Active or Inactive.
Description	Enter a description of the process—what does it do?
Parameters	Displays what parameters are used for the selected process.
Add/Edit Rights	Select a client administrator type that should have add and edit rights to processes.
Launch Rights	Select a client administrator type that should have the rights to launching a process.
Launch Rights	If necessary, select a second client administrator type that should have right to launching a process.
View Log Rights	Select a client administrator type that can have rights for viewing the process execution log.

Rules/Considerations

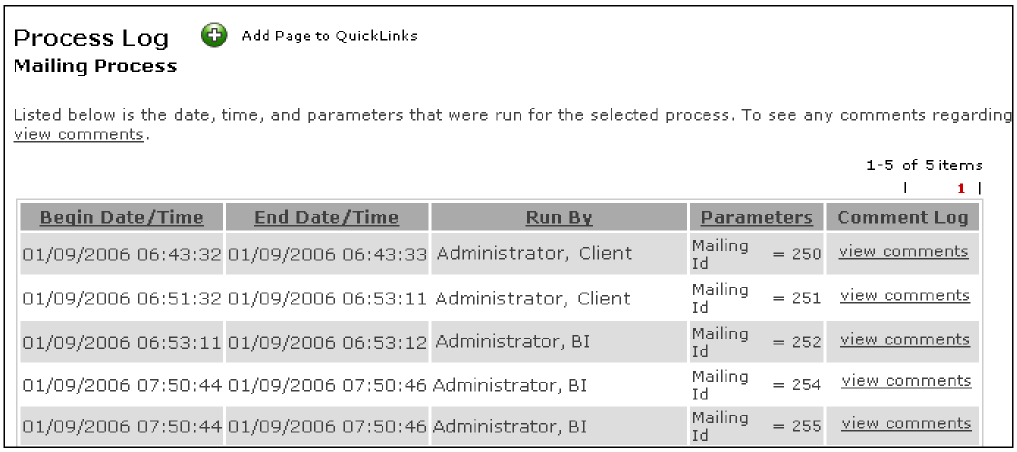
- The type of process to run is selected from the `Program` field drop-down list shown on the *Process Detail* page.
- Enrollment Process
  - Enrolls all participants who were not previously enrolled in the bank account system.
  - Use the online enrollment method available in Order Management services.
  - After successful enrollment, the AwardBanQ number and Centrax ID are updated.
  - The user is emailed the number of participant enrollments that were attempted and how many succeeded and failed. If there were failures, the reason for the failures is included in the logs.
- Participant Updates Process
  - Updates profile information of participants who are already enrolled in the bank account system.
  - Use the online enrollment method available in Order Management services.
  - The user is emailed the number of participant updates that were attempted and how many succeeded and failed. If there were failures, the reason for the failures is included in the logs.
- Deposit Process
  - Deposits all non-posted journals that are approved where the payout type is AwardperQs.
  - Use the online deposit method available in the OM services.
  - Parameters include the promotion name for which the deposit has to be completed.
  - After successful deposit, the appropriate deposit records are created in the journal.
  - The user is emailed the number of deposits that were attempted and how many succeeded and failed. Also the total number of points deposited is emailed. If there were failures, then the reason for the failures is included in the logs.
- Run Batch Promotion Engine Process
  - Pays out all eligible activities for a promotion and its children.
  - Parameters include the promotion name.
  - After successful completion need, the user is emailed the number of payouts created. If there were failures, the reason for the failures is included in the logs.
- Hardcopy Statement Process
  - Populates the hard copy statement tables.
  - Parameters include:
    - AUDIENCE STATUS (pick list – Active or All)
    - STATEMENT AUDIENCE (pick list – Balance, Activity, All, Activity or Balance)
    - START DATE
    - END DATE
  - After successful completion of the process, the user is sent an email.
  - Produces the hard copy statements report. The user can download the statement in PDF format.

- Welcome Emails Process
  - Sends welcome emails to all participants who have not been sent an email.
  - Creates communication logs after successful completion of the process, for each participant who was sent a welcome email.
- E-statements Process
  - Sends monthly statements to all participants.
  - After successful completion of the process, an email is sent to all participants with their statement details.
- Manager overrides Process
  - Calculates all manager’s overrides set up for a promotion and deposits the points to the banking system.
  - Parameters include promotion name and date range.
  - An email is sent after the process is completed, which includes counts of manager overrides deposited and the amounts deposited.
- Proactive Messages Process
  - Sends any proactive message for a promotion. For example, promotion announcements and promotion endings.
  - Parameter includes promotion name.
- Delayed Approvals
  - Approves any activity for a promotion that has delayed approvals.
  - This process is scheduled as needed.

System

Process Execution Log

Description:	The Process Execution Log lists all the program processes that are scheduled to run for a given period, such as: enrollment, participant updates, deposit, payouts, statements, emails, comm logs, manager overrides, messages, and delayed approvals.
User type:	User, PAX Administrator, BI Administrator
Access:	System->Process Execution Log



Rules/Considerations

- Active processes are listed in the process page by:
  - Process name (user can click on the name to edit the process).
  - Last executed.
  - Available actions include: Launch, Schedule, or View logs.
  - A link is provided for viewing inactive processes
- The required fields for the process include:
  - Process name
  - Status
  - Program name
- Description is an optional field.
- Parameters are view only and cannot be added through the interface.
- Security permissions can be assigned using Roles and ACLS to make sure only specific users have access to run specific processes.
- When a process is launched the user is given all the parameters needed to run the process, submit the process to be run in the background, and provide a confirmation page.
- The user can delete a scheduled process.
- The logs of a process are viewed from the process list page. Provide filtering by process begin date/time. Display the following in the view log page
  - Process name

- Process begin date/time
- Process end date/time
- User name who ran the process
- Parameters and the values supplied
- Log text (a link to open the log in a new in line page is provided.)

System

Product Categories

Description	Sets up product categories for Product Claim promotions only. Product categories are used to group products of similar types.
Audience:	User, BI Administrator, PAX Administrator.
Prerequisites:	Categories must be defined before Product Claim promotions are created.

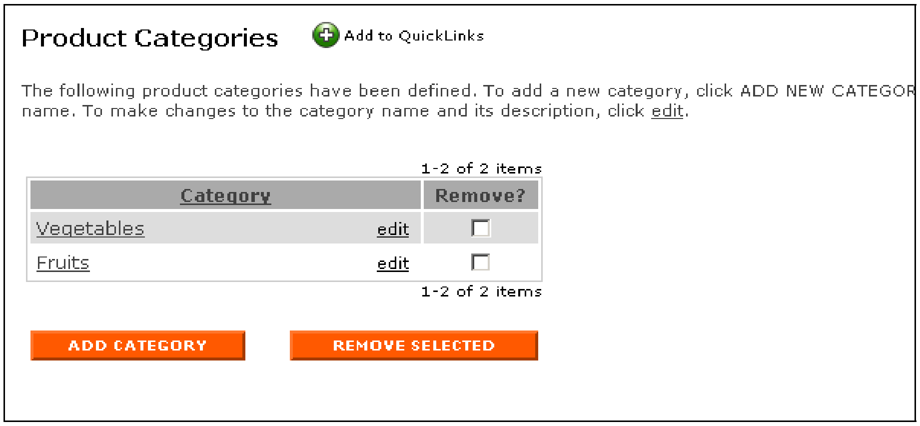


Table 71 - Product Categories

Field/Labels	Description
Add to QuickLinks	Click to add this function to the QuickLinks column on the home page. You can add up to five QuickLinks on the front page.
Category	Click the category item listed to view a description of the category, edit or remove the category, or define a subcategory.
Remove?	Check this box to remove the category then click Remove Selected.
edit	Click edit to go directly to the category to edit the descriptions.
ADD CATEGORY button	Click to create a new product category.
REMOVE SELECTED button	Click to remove any of the categories that have the Remove? box checked.

Add Category

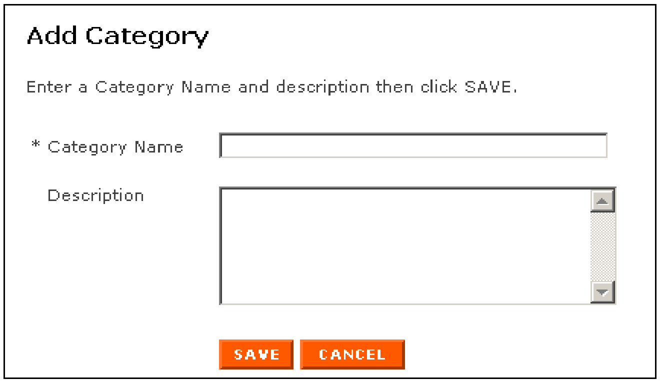


Table 72 - Add Category

Field/Labels	Description
*Category Name	Enter a unique name. For example, enter Electronics, Wallpaper,
Description	Enter a brief description that best describes this category.

* Required Fields

View Category

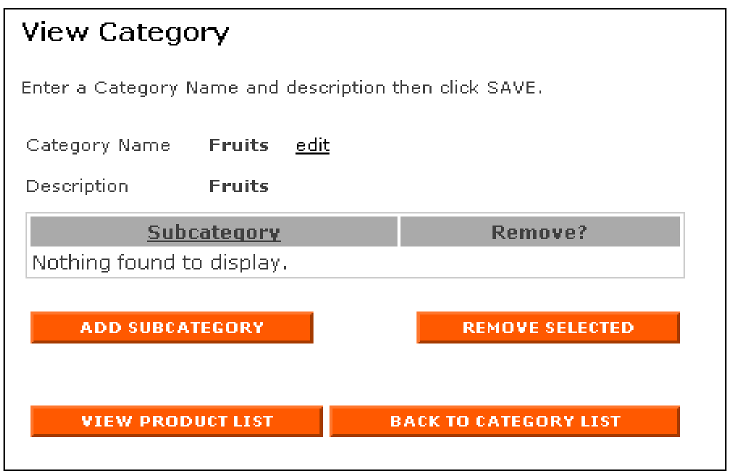


Table 73 - View Category

Field/Labels	Description
Category Name	Enter a unique name. For example, enter Electronics, Wallpaper,
edit	Click to edit the selected category.
Description	Displays the main category description.
Subcategories	Displays the subcategory, if there is one.
ADD SUBCATEGORY	Click to add a subcategory and description.
REMOVE SELECTED	Deletes the selected category.
VIEW PRODUCT LIST	Displays the entire list of products.
BACK TO CATEGORY LIST	Returns to the list of categories.

Rules/Considerations

- More than one product category can be created.
- More than one sub-category can be attached to a product category.
- Sub-categories are optional.
- Product category name should be unique within the parent category.
- A product category cannot be deleted if there are products attached to it. An error message is displayed to first delete the products and then delete the category.
- A product category cannot be deleted if any of the products in that category are associated with any promotions.
- A product category can be deleted if any of the products in that category are not associated with any promotions.

System

Product Library

Description	Enables you to view, edit, or add products to the product library.
Audience:	User, BI Administrator, PAX Administrator.
Prerequisites:	Categories must be defined before you can add a new product.

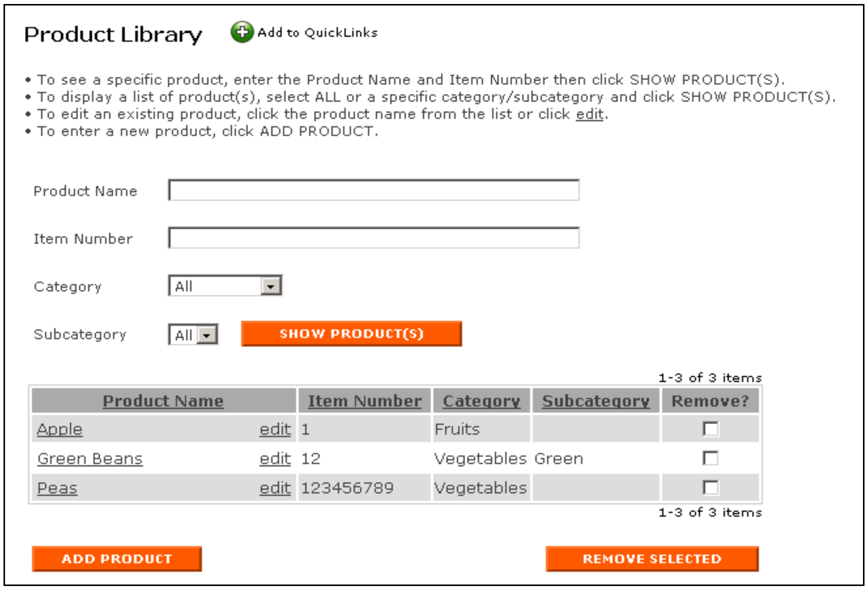


Table 74 – Product Library

Field/Labels	Description
Product Name	Enter the name of the product you wish to view or edit. If you don't remember, select a Category and/or Subcategory then click Show Product(s) to display a list of all product(s).
Item Number	Enter the product item number (i.e., SKU number).
Category	Select the category to which the product belongs.
Subcategory	Select the subcategory to which the product belongs.
SHOW PRODUCT(S) button	Click THE SHOW PRODUCT(S) button to display the product you are looking for or to display all products. From the list of products, click the product name to edit or add product characteristics or the product name.
Remove?	To delete a product, check the appropriate Remove box then click Remove Selected.
ADD PRODUCT button	To add a new product, click the ADD PRODUCT button.
REMOVE SELECTED	To delete a product, check the appropriate Remove box then click Remove Selected.

Add Product

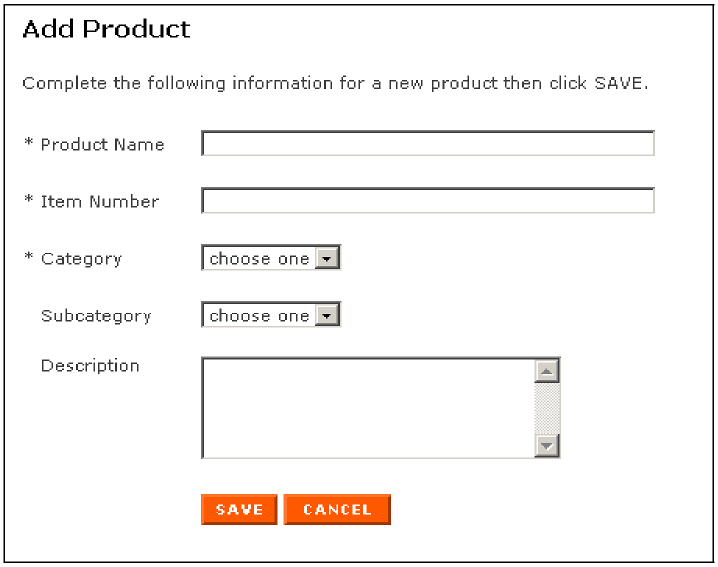


Table 75 – Add Product

Field/Labels	Description
*Product Name	Enter the name of the product you wish to add. The name must be unique.
*Item Number	Enter the product item number (i.e., SKU number).
*Category	Select the category to which the product belongs. **NOTE**: A product can only be attached to one product category
Subcategory	Select the subcategory to which the product belongs.
Description	Enter a description of the product.

* Required Fields

View Product

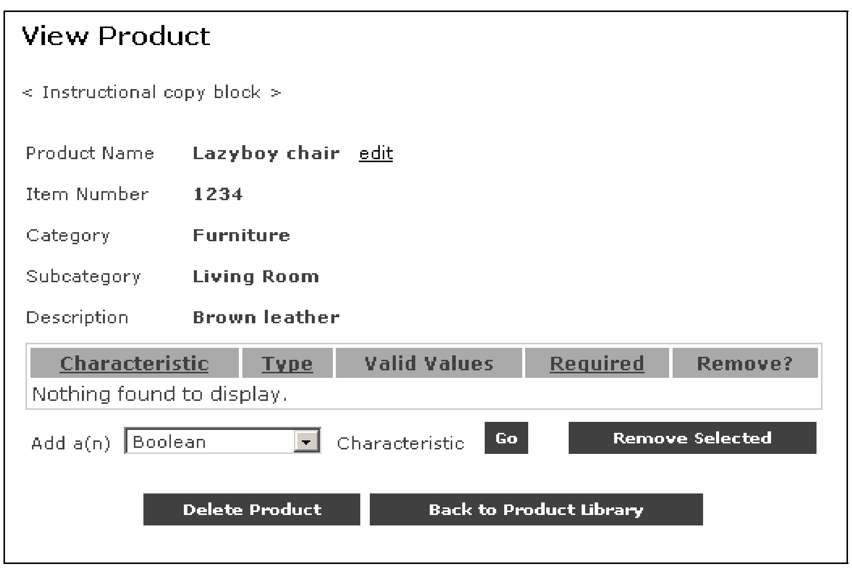


Table 76 – View Product

Field/Labels	Description
Product Name edit	Enter the name of the product you wish to add. The name must be unique.
Item Number	Displays the product item number (i.e., SKU number).
Category	Displays the category to which the product belongs. **NOTE**: A product can only be attached to one product category
Subcategory	Displays the subcategory to which the product belongs.
Description	Displays the product description.
Add a(n) Boolean Characteristic Go	Select a product characteristic (Boolean, Date, Decimal, Integer, Multi Select List, Single Select List, Text) then click Go. **NOTE**: For a description of each of these characteristic types, refer to Table 60 on page 138.

Rules/Considerations

- A product can only be attached to one product category.
- A product can be attached to only one subcategory within a product category.
- Required fields are product name, product SKU/code/Item number
- Product name should be unique within a category including sub categories.
- A product/category/subcategory can be deleted (physically) if it is not associated with any promotions.
- A product cannot be deleted if it is attached to at least one promotion.
- A product category/subcategory cannot be deleted if it is attached to at least one promotion.

System

Quiz Library

Description: Quizzes test participants' knowledge about specific topics, which you can establish for specific audiences. The Quiz Library is a collection of quizzes (multiple choice only) that you can activate, inactivate, or edit for use in a promotion.

Audience: User, BI Administrator, PAX Administrator

Prerequisites: None

For a description of a sequence to follow for creating a quiz including questions and answers, refer to Creating a Quiz on page 170.

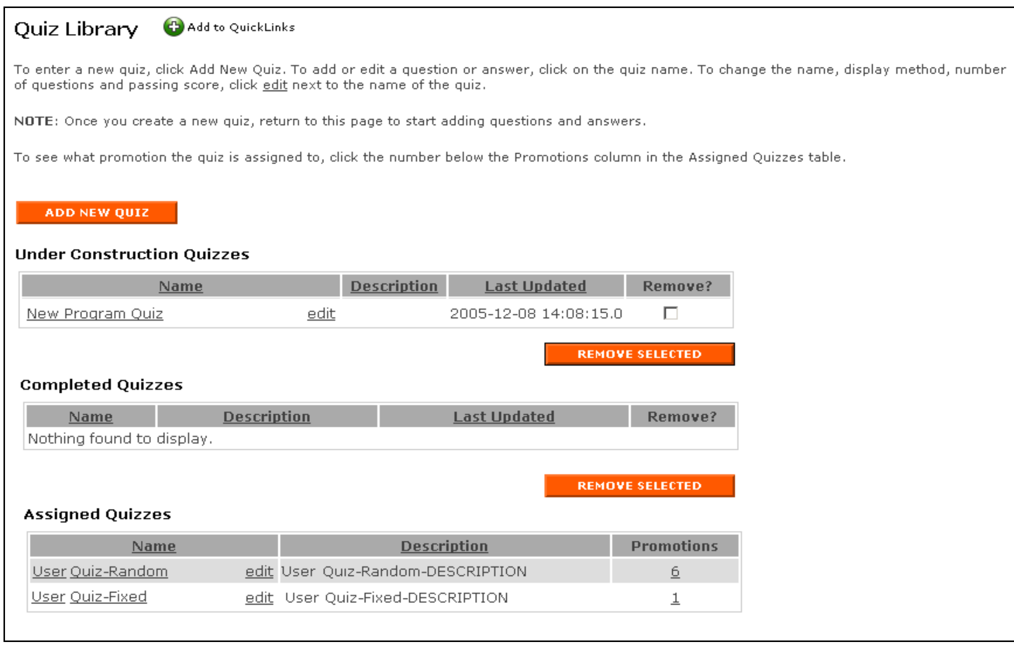


Table 77 – Quiz Library

Field/Labels	Description
ADD NEW QUIZ button	Click to enter a new quiz and first define the name, display method (random or fixed), and passing score. **NOTE**: You can only create multiple choice quizzes.
Quiz Name edit	Click the name of the quiz to add or edit questions and answers. Click edit to change the name, display method, and passing score.
Remove?	To delete a quiz, check the Remove box next to the appropriate quiz then click Remove Selected.
Remove Selected	To delete a quiz, check the Remove box next to the appropriate quiz then click Remove Selected.
Assigned Quizzes table	Click the number shown below the Promotions column to view the promotions information related to the selected quiz.

Add New Quiz

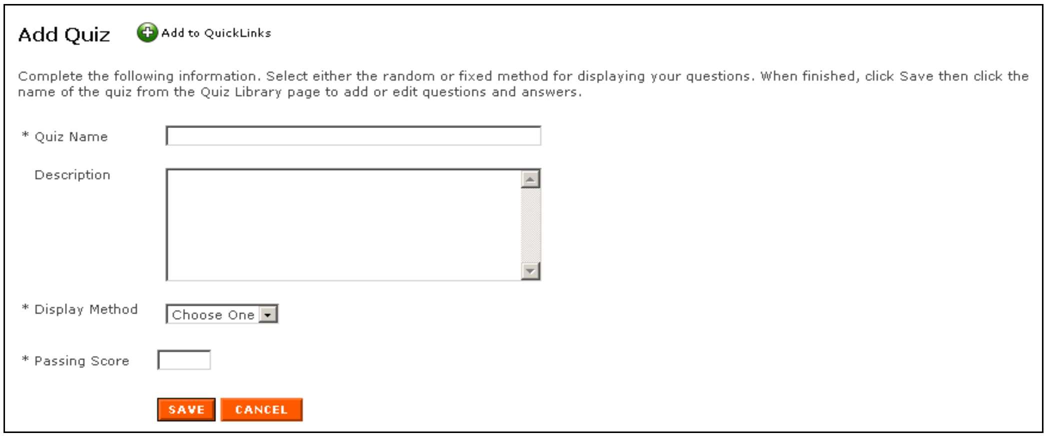


Table 78 – Add Quiz

Field/Labels	Description
*Quiz Name	Enter a *unique* name for the quiz you are creating.
Description	Enter a brief description of the quiz.
*Display Method	Select Random or Fixed. Quiz promotions use either a random or fixed display format. A *fixed* format always presents the same number of questions in the same sequence. A *random* format presents at least a minimum number of questions in a different order, but not necessarily all questions. If the method is fixed, you can add as many questions as needed. If random, you must enter, at a minimum, the same number of questions as the number of questions asked.
*Number to Ask (if random format is selected)	Enter the number of questions in the quiz. The number of questions to ask is required if the quiz format (method) is random. There is no limit on the number of questions you can ask.
*Passing Score	The number of questions the participant is required to answer correctly in order to pass the quiz. This value cannot be more than the number of questions asked.

* Required Fields

View Quiz

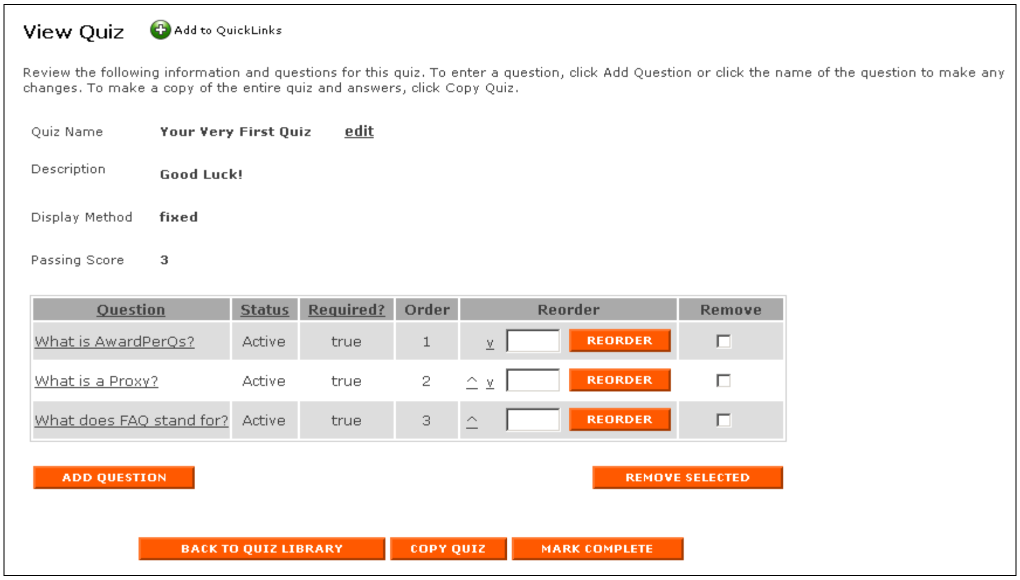


Table 79 – View Quiz

Field/Labels	Description
Quiz Name edit	Displays the name of the quiz. Click edit to change the name of the quiz,
Description	Displays the description of the quiz.
Display Method	Displays either Random or Fixed. A *fixed* display format always presents the same number of questions in the same sequence. A *random* format presents at least a minimum number of questions in a different order, but not necessarily all questions.
Number to Ask (if random format is selected)	Displays the number of questions in the quiz.
Passing Score	Displays the number of questions the participant is required to answer correctly in order to pass the quiz.
View Quiz Table List	
Question	Click the title of the question to reorder or remove the questions, or add an answer to the question.
Status	Displays the current status of the question: active or inactive.
Required?	Displays whether the question is required or not required.
Order	Displays the current question sequence.
Reorder	Click the up or down symbols to change the sequence of questions or enter a number in the box to the left of the REORDER button then click Reorder to change the sequence.
Remove	Check this box to delete the desired question from the library then click Remove Selected.
ADD QUESTION button	Click to enter a new question.
REMOVE SELECTED button	Check the Remove box then click Remove Selected to delete the desired question

Field/Labels	Description
COPY QUIZ button	Click this button to make a copy of the entire quiz including questions and answers, and then use it to create another quiz. Any copy of a quiz is set to a status of Under Construction.

Add/Edit a Question

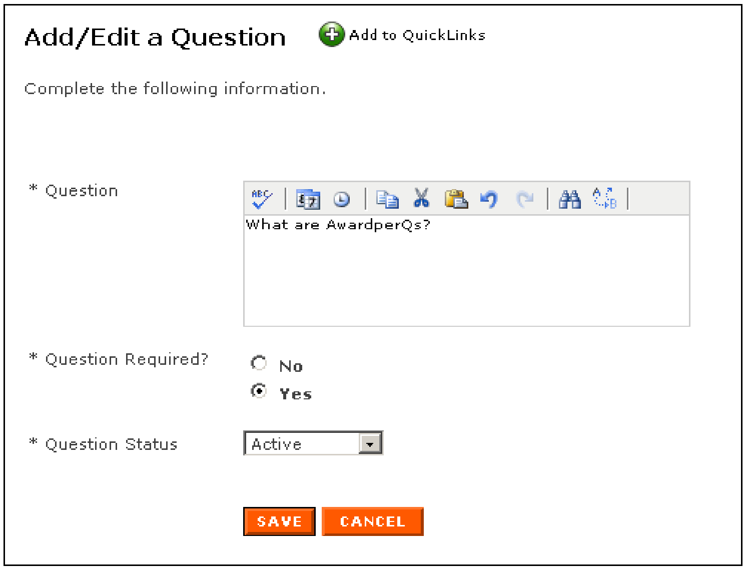


Table 80 - Add/Edit a Question

Field/Labels	Description
*Question	Enter the text of the question.
*Question Required?	Select No or Yes if the question is required or not required for passing the quiz.
*Question Status	Select Active or Inactive. Selecting inactive saves the question for later use.

* Required Fields

Add/Edit an Answer

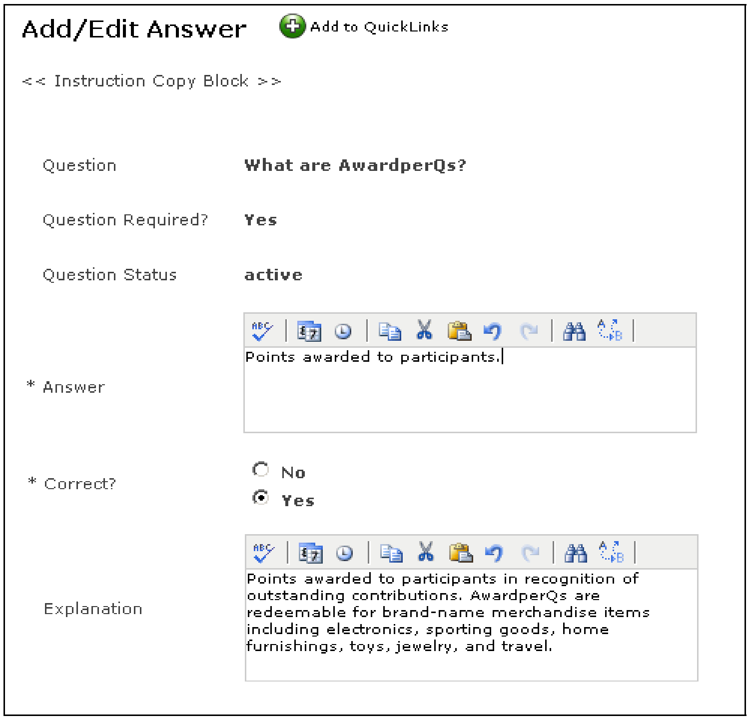


Table 81 - Add/Edit an Answer

Field/Labels	Description
*Question	Displays the text of the question.
*Question Required?	Displays No or Yes depending if the question is required or not required for passing the quiz.
*Question Status	Displays whether the question is currently Active or Inactive.
*Answer	Enter an answer to the question. The answer can be correct or an incorrect answer. More than one answer can be marked as correct. There is no limit on the number of answers you can provide.
*Correct?	Select No or Yes depending on whether the text entered for Answer is the correct or incorrect answer.
Explanation	As an option, enter an explanation as to why the answer is correct or incorrect.

* Required Fields

Creating a Quiz (Suggested Sequence)

Perform the following sequence of tasks to create a quiz with correct and incorrect answers:

1. From the *Quiz Library* page, click Add New Quiz.
2. Enter a name for the quiz and indicate if it is a random or fixed quiz and the passing score. Click Save.
3. From the *View Quiz* page, click Add Question.
4. Enter the first question and click Save.
5. From the *View Quiz* page, click Add Question to enter the second question.
6. Enter the second question in the quiz and click Save.
7. Continue adding questions (steps 3 through 6) until you are finished.
8. To enter answers to the questions, click on the name of the first question shown in the list of questions on the *View Quiz* page. The program displays the *Add/Edit a Question* page.
9. Click Add Answer. The program displays the *Add/Edit Answer* page.
10. Complete the answer for the first question in the quiz and indicate if it is the correct or incorrect answer and an explanation, if needed.

NOTE: You must have at least two answers for each question, one of which is incorrect.

11. Click Save when finished with the first answer.
12. Click Add Answer from the *Add/Edit a Question* page to add the second answer to the same question.
13. Click Save when finished with the second answer. If desired, continue adding more answers.
14. Click the BACK TO QUIZ button to return to the *View Quiz* page and continue entering answers for the other questions you created.
15. When finished, click Mark Complete from the *View Quiz* page.

NOTE: Before assigning a quiz to a promotion, the quiz must be marked as complete.

Rules/Considerations

- Any quiz that is copied is set to a status of Under Construction.
- Adding Questions and Answers:
  - If the quiz format is fixed, the user can add as many questions as needed. If the quiz format is random, the user must enter, at a minimum, the same number of questions as the number of questions asked.
  - Maximum size of question text is 500 characters.
  - The question number and sequence is not entered by the user.
  - If the quiz format is random, the number of questions Required to ask (Yes/No) is required.
  - There is a minimum of two answers per question asked.
  - Marking the correct answer is required. More than one answer can be marked correct.
  - Extended answer text is optional.
  - Questions and answers can be re-ordered.

  - Questions, answer, and optional answer text can be spell checked. They are also stored in Content Manager so that they can be internationalized.

- Marking a quiz as complete. The following information is required in order for a quiz to be marked as complete:
  - All required fields are completed.
  - Each question has at least two possible answers and at least one of the answers is marked as the correct answer.
  - If it's a random type quiz, the number of questions is at least equal to the number of questions to ask.
  - When a promotion using a quiz form expires, the form is moved back to a status of Complete.

- Under Construction and Completed Quizzes can be deleted.
  - If a user attempts to delete a form that is attached to an expired promotion an error condition is displayed.

- Every quiz must be marked completed before being assigned to a promotion.

- Questions and answers can be edited on a live quiz form.

- Editing a Quiz
  - An expired quiz cannot be edited except for the end date.
  - Under Construction and Completed Quizzes can be deleted.
  - Every quiz needs to be marked completed before going live.
  - The following items can be edited on a live quiz:
    - Quiz Promotion name
    - Quiz end date
    - Audience
    - Payouts (cannot change payout types)
    - Sweepstakes
    - Questions and Answers
    - Rules text
    - Notifications

- Rules for editing a *random* type quiz include the capability to:
  - add a new required question as long as the number of required questions does not exceed the number of questions to ask.
  - add a new "not required" question.
  - inactivate a "not required" question as long as the total number of active questions is at least equal to the number of questions to ask.
  - inactivate a required question as long as the total number of active questions is at least equal to the number of questions to ask.
  - decrease the number of questions to ask as long as it is equal to or greater than the number of required questions.
  - increase the number of questions to ask as long as it is less than or equal to the total number of active questions.
  - change the passing score.
  - increase the number of attempts or set the number of attempts to a fixed number if it was previously unlimited.
  - not change a random type quiz to a fixed type quiz.
  - change question and answer text.
  - mark additional correct answers but cannot uncheck an existing correct answer.

- Rules for editing a *fixed* type quiz include the capability to:
  - inactivate a question. If a participant has not completed the quiz and if they have not been asked this inactivated question then the question is not presented.
  - add a new question. A newly added question will only be presented for new attempts. Participants who are in the midst of an attempt to answer an added question will not be presented with the new question.
  - change the passing score.
  - The number of attempts can be increased or can be set to a number if previously unlimited.
  - not change a fixed type quiz to a random type quiz.
  - change question and answer text.
  - mark additional correct answers but cannot uncheck an existing correct answer.

System

Roles

Description: Roles play an important part in determining the responsibilities and functions that each user has in the system. Roles are defined during the system definition and configuration phase of a project. Any changes to a role and its functions, or addition of a new role, require a special request to the Development or Process Team.

Audience: User, BI Administrator, PAX Administrator

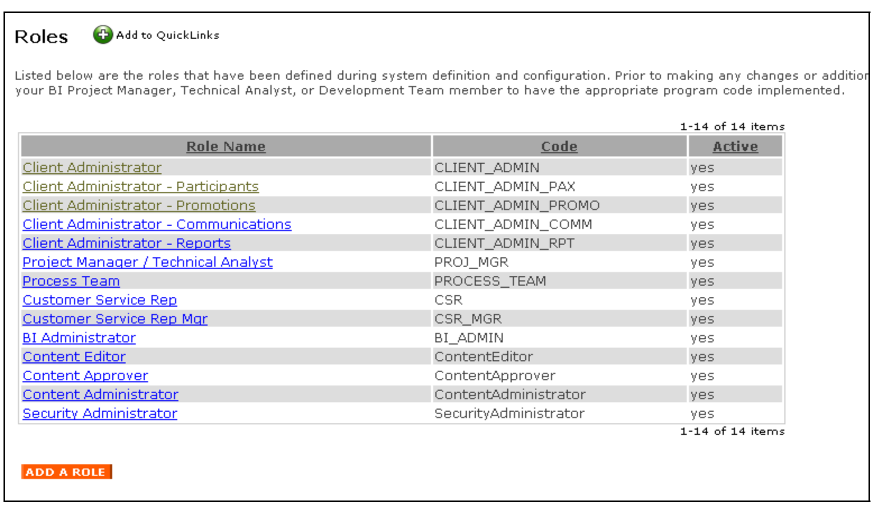
Prerequisites: Roles are pre-defined in the system. Any changes to the role and its functions require a special request to the Development Team.

Listed below are the predefined roles that are standard with the Platform.

Table 82 - Roles

Role Name	Role Code
Security Administrator	SecurityAdministrator
Content Administrator	ContentAdministrator
Content Approver	ContentApprover
Content Editor	ContentEditor
Content Viewer	ContentViewer
Customer Service Rep	CSR
Customer Service Rep Mgr	CSRMgr
Process Team	ProcessTeam
BI Administrator	BIAdmin
Project Manager / TA?	ProjMgr
Client Administrator	ClientAdmin
Client Administrator - Participant	ClientAdminPax
Client Administrator - Promotion	ClientAdminPromo
Client Administrator - Communications	ClientAdminComm
Client Administrator - Reports	ClientAdminRpt

For example, a Client Administrator for promotions can view, add, and edit promotions as well as view, add and load budget information. For a listing of what administrative functions each role can perform, refer to the charts on the following pages.



Roles Add to QuickLinks

Listed below are the roles that have been defined during system definition and configuration. Prior to making any changes or additio
your BI Project Manager, Technical Analyst, or Development Team member to have the appropriate program code implemented.

1-14 of 14 items

Role Name	Code	Active
Client Administrator	CLIENT_ADMIN	yes
Client Administrator - Participants	CLIENT_ADMIN_PAX	yes
Client Administrator - Promotions	CLIENT_ADMIN_PROMO	yes
Client Administrator - Communications	CLIENT_ADMIN_COMM	yes
Client Administrator - Reports	CLIENT_ADMIN_RPT	yes
Project Manager / Technical Analyst	PROJ_MGR	yes
Process Team	PROCESS_TEAM	yes
Customer Service Rep	CSR	yes
Customer Service Rep Mgr	CSR_MGR	yes
BI Administrator	BI_ADMIN	yes
Content Editor	ContentEditor	yes
Content Approver	ContentApprover	yes
Content Administrator	ContentAdministrator	yes
Security Administrator	SecurityAdministrator	yes

1-14 of 14 items

ADD A ROLE

Participant Roles

	ROLE			
Navigation Tab	**Participant**	**Manager**	**Approver**	**PAX Admin**
Home	**X**	**X**	**X**	**X**
Module Links	**as assigned**			
My Info				
My Account	**X**	**X**	**X**	**X**
My Profile	**X**	**X**	**X**	**X**
My Preferences	**X**	**X**	**X**	**X**
Shop	**X**	**X**	**X**	**X**
Help	**X**	**X**	**X**	**X**
FAQ's	**X**	**X**	**X**	**X**
Contact Us	**X**	**X**	**X**	**X**
Proxy	**as assigned**			
Approvals	**as assigned**			
Reports		**X**		**X**
Admin				**X**

User/Admin Roles

		ROLE									
		CSR	CSR Manager	PT	BI Admin	PM/TA	Client Admin	CA - Participants	CA - Promotions	CA - Communications	CA-Reports
Navigation Tab	**Specific Task/Program Functions**										
User -Participants	Add Nex Pax			X	X	X	X	X			
	Viewing Pax Data	X	X	X	X	X	X	X			
	Update Participant			X	X	X	X	X			
	Load Participant file			X	X	X	X	X			
Promotions	View Promotion List	X	X	X	X	X	X		X		
	Add New Promotion			X	X	X	X		X		
	Edit Promotion			X	X	X	X		X		
Budgets	View Budget List	X	X	X	X	X	X		X		
	Add Budget Master			X	X	X	X		X		
	Load Budget File			X	X	X	X		X		
Communications	Message Library				X	X	X	X		X	
	Send adhoc message				X	X	X	X		X	
	Manage Comm Logs		X	X	X	X	X	X		X	
System	View Audience Definition			X	X	X	X	X	X	X	
	Audience Definiton				X	X	X	X	X	X	
	Update Audience Definition				X	X	X	X	X	X	
	Content Manager			X	X	X	X	X		X	
	View Countries & Suppliers				X	X	X				
	Countries & Suppliers				X	X	X				
	View Employers	X	X	X	X	X	X				
	Maintain Employers				X	X	X				
	View FAQ's	X	X	X	X	X	X	X	X	X	
	Maintain FAQ's			X	X	X	X			X	
	Form Library				X	X	X		X		
	View Hierarchy						X	X	X		
	Hierarchy				X	X					
	Hierarchy				X	X					
	Node Types				X	X					
	Image Library				X	X					
	Maintain Pax Chracteristics				X	X	X	X			
	Picklists				X	X					
	Processes:			X	X	X					
	Maintain Processes			X	X	X					
	Process Execution			X	X	X					
	Client Available Processes			X	X	X	X	X	X		
	View Process Logs			X	X	X	X	X	X		
	View Products			X	X	X	X		X		
	Maintain Products				X	X	X		X		
	View Categories			X	X	X	X		X		
	Maintain Categories				X	X	X		X		
	Maintain Roles					X					
	Maintain Users		X		X	X	X				
	System Variables					X					
	Process Sweepstakes			X	X	X	X		X		
Help	View System Documentation	X	X	X	X	X	X	X	X	X	
	Contact Support	X	X	X	X	X	X	X	X	X	
	View System Information	X	X	X	X	X	X	X	X	X	
Proxy	Proxy Rights for all			X	X	X					
Approvals	Complete Approvals						as assigned				
	Edit item submitted for approval					x					
Reports	View All reports, all levels			X	X	X	X				X

System

System Variables

Description: System variables are pre-defined attributes that control what features and elements of the Platform are available and functional. System variables, set up during the system definition phase, are used to customize an application for the client. For example, you can enter the email address for the system variable (contact.us.email) used for the Contact Us menu item that appears on the Help tab. You can also turn on or turn off certain features, such as news items, welcome messages, and ads that appear in the left or right rail of the Home page.

Audience: User, BI Administrator

NOTE: For a list of system variables that require customization, refer to **Table 2 – System Variables** on page **32**.

System Variable List

Variable Name	Variable Group	Variable Type
all.users.proxy	proxy	Boolean
awardbanq.convertcert.used	Is Convert Certificate used?	Boolean
awardbanq.organization.number	AwardBanQ Realtime User Id	String
awardbanq.realtime.userid	AwardBanQ Realtime User Id	String
awardbanq.source.system	AwardBanQ Source System	String
awardbanq.used	Is AwardBanQ used?	Boolean
boolean.include.balance	user info	Boolean
claim.processing.allow.batch	Allow Claim Batch Processing	Boolean
client.contact.url	Client Contact Us URL	String
client.launch.date	Client Launch Date	Date
client.name	Client Name	String
client.url	Client URL	String
contact.us.email	Contact Us Email	String
dev.omservices.provider	Dev OMServices Provider URL	String
email.address.incentive.personaldisplay	Incentive Personal Name Display	String
email.address.system	System Notification Email Address	String
email.address.system.incentive	Incentive System E-mail Address	String
email.address.system.personaldisplay	System Personal Name Display	String
email.address.system.sms	System Notification SMS Address	String
email.subject.prefix	Subject Prefix	String
email.welcome.loginAndPassword.separate	send Login ID and Password separately	Boolean
escalation.hierarchy.id	Escalation Hierarchy Name	Long
goalquest.programcode.dev	GoalQuest Program Code-Dev	String
goalquest.programcode.preprod	GoalQuest Program Code-PreProd	String
goalquest.programcode.prod	GoalQuest Program Code-Prod	String
goalquest.programcode.qa	GoalQuest Program Code-QA	String
goalquest.url.dev	GoalQuest URL - Dev	String

System variable list continued on the following page.

System Variable List (continued)

home.include.news_clips	Include News Clips	Boolean
home.include.welcome	Include Welcome	Boolean
home.leftRail.widgets	Left Rail Widgets	String
home.rightRail.widgets	Right Rail Widgets	String
import.client.prefix	client_prefix	String
import.file.location	datacenter_location	String
import.file.utl_path	db_utl_path	String
import.pax.file.name	pax_file_name	String
install.ideas	Ideas Installed	Boolean
install.newhire	New Hire Referrals Installed	Boolean
install.nominations	Nominations Installed	Boolean
install.productclaims	Product Claims Installed	Boolean
install.quizzes	Quizzes Installed	Boolean
install.recognition	Recognition Installed	Boolean
install.sixsigma	Six Sigma Installed	Boolean
ips.to.allow.csv.regex	Only allow these IPs	String
lockout.failure.count	Auth Failure Count For Lockout	Integer
participant.allow.contacts	Allow Contacts?	Boolean
participant.allow.estatements	Allow estatements?	Boolean
participant.allow.textmessages	Allow Text Messages?	Boolean
password.can.reuse	Can Reuse Password	Boolean
password.expired.period	Password Expired Period (ms)	Long
password.force.reset	Force Password Reset For Pax	Boolean
password.min.length	Password Min Length	Integer
password.not.match.regex	Password Not Match Regex	String
password.should.use.regex	Password Use Regex	Boolean
preprod.omservices.provider	PPRD OMServices Provider URL	String
prod.omservices.provider	Prod OMServices Provider URL	String
proxy.pax.search.node.restriction	proxy	Boolean
qa.omservices.provider	QA OMServices Provider URL	String
shop.internal.proxy.dev	Shop Internal Proxy-Dev	String
shop.internal.proxy.preprod	Shop Internal Proxy-Preprod	String
shop.internal.proxy.prod	Shop Internal Proxy-Prod	String
shop.internal.proxy.qa	Shop Internal Proxy-QA	String
shop.internalfeatureditmsdestenv.dev	ShopInternalFeaturedItmsDestEnv-DEV	String
shop.internalfeatureditmsdestenv.preprod	ShopInternalFeaturedItmsDestEnv-Preprod	String
shop.internalfeatureditmsdestenv.prod	ShopInternalFeaturedItmsDestEnv-Prod	String
shop.internalfeatureditmsdestenv.qa	ShopInternalFeaturedItmsDestEnv-QA	String
shop.internalmygoaldestenv.prod	Shop Internal My Goal Dest Env-Prod	String
shop.internalmygoaldestenv.qa	Shop Internal My Goal Dest Env-QA	String
shop.internalpostloginurl.dev	Shop InternalPostLoginURL-DEV	String

System variable list continued on the following page.

System Variable List (continued)

shop.internalpostloginurl.preprod	ShopInternalPostLoginURL-PPrd	String
shop.internalpostloginurl.prod	Shop InternalPostLoginURL-Prod	String
shop.internalpostloginurl.qa	ShopInternalPostLoginURL-QA	String
shop.internalproxyport.dev	Shop Internal Proxy Port-Dev	Integer
shop.internalproxyport.preprod	Shop InternalProxyPort-Preprod	Integer
shop.internalproxyport.prod	Shop Internal Proxy Port-Prod	Integer
shop.internalproxyport.qa	Shop Internal Proxy Port-QA	Integer
shop.internalremoteurl.dev	Shop Internal Remote URL-DEV	String
shop.internalremoteurl.preprod	Shop InternalRemoteURL-Preprod	String
shop.internalremoteurl.prod	Shop Internal Remote URL-Prod	String
shop.internalremoteurl.qa	Shop Internal Remote URL-QA	String
shopping.link.used	Shopping Link Used	Boolean
should.restrict.by.ip	Restrict Access based on IP	Boolean
site.url.dev	Dev Site URL	String
site.url.preprod	PPRD Site URL	String
site.url.prod	Prod Site URL	String
site.url.qa	QA Site URL	String
thankq.url.dev	ThankQ URL - Dev	String
thankq.url.preprod	ThankQ URL - PreProd	String
thankq.url.prod	ThankQ URL - Prod	String
thankq.url.qa	ThankQ URL - QA	String
unix.movefile.scriptname	unix_movefile_script	String
unix.movefile.scriptpath	unix_movefile_script	String

System

Users

Description: A user only has administrative rights to the Platform and is not a participant in any promotion. A user may be an approver, site administrator, BI administrator, BI Project Manager, or a Client Administrator such as a manager or employee assigned with responsibility for administering the site.

Audience: User, BI Administrator, Client Administrator

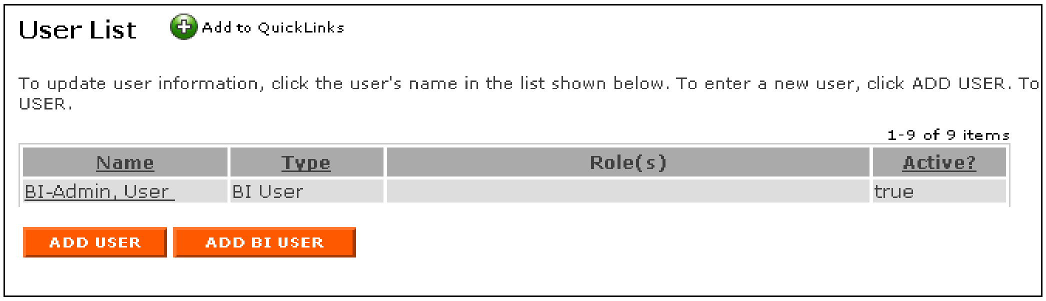


Table 83 – User List

Field/Labels	Description
User Name	Click on a user name to edit user characteristics such as personal information, password, roles, and hierarchy.
ADD USER button	Click to add a user and their characteristics.
ADD BI USER button	Click to add a BI user and their characteristics. **NOTE**: Add BI User is the same as Add User, except, you *do not* select an hierarchy location because a BI User is not part of the client organization. It's a good idea to add the BI Project Manager as a BI User in the system

Add User

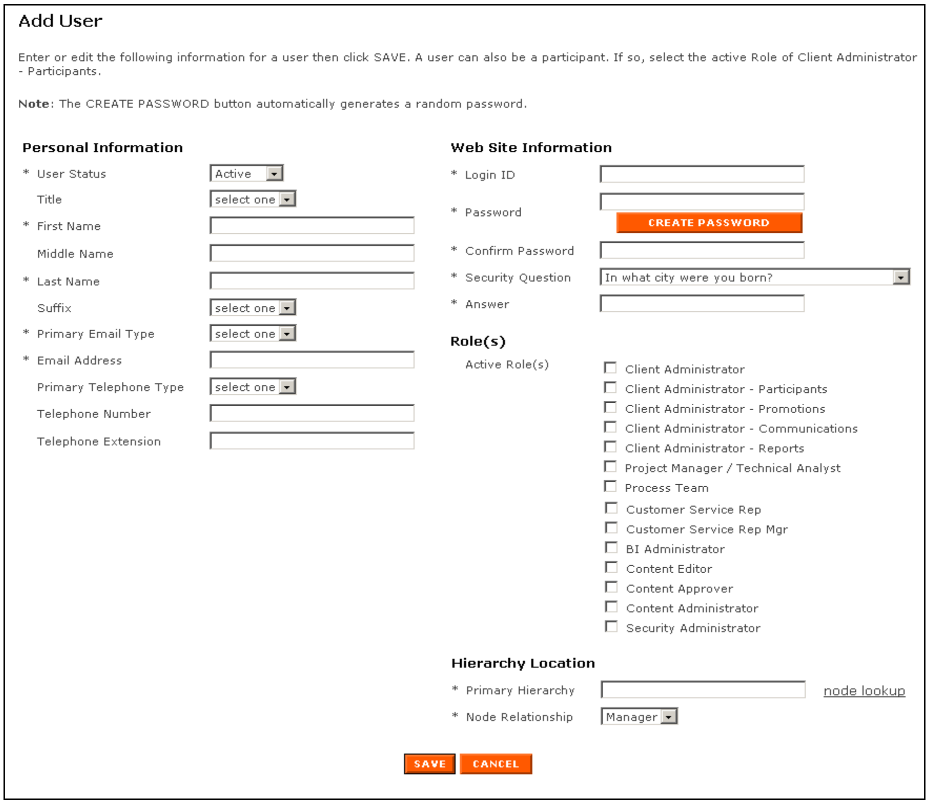


Table 84 – Add User

Field/Labels	Description
Personal Information	Complete the user characteristics, making sure to complete the required (*) items.
Web Site Information	Enter a Login ID and Password. If you want to have the system automatically generate a password, click the CREATE PASSWORD button.
Role(s)	Check one or more roles that you want the user to have. If the user will also be a participant (PAX Administrator), be sure to check Client Administrator – Participants.
Hierarchy Location	Enter the Primary Hierarchy (i.e., ABC Corporation) to which the user belongs. Click node lookup if you do not know the hierarchy. Also select the Node Relationship.

Add BI User

Add BI User is the similar to Add User, except you do not select a hierarchy because a BI User is not part of the client organization. It’s a good idea to add the BI Project Manager as a BI User in the system.

APPENDIX

Appendix A – Image Standards

Logo standards

- Dimensions- 400 x 70 pixels (400 pixels is maximum width [20k])

Merchandise image standards

Thumbnail: .jpg 100 x 100 pixels (000000_tn)

Detail: .jpg 250 x 250 pixels (000000_dtl)

Enlargement: .jpg 500 x 500 pixels (000000_ex)

E-card image standards (includes one set of each):

Image Type	Dimensions	Format	Max File Size
Thumbnail	72 x 72p	.gif	12k
Static JPG	360 x 360p	.jpg	25k
FLASH	360 x 360p	.swf	65k

Other images are product dependent

Will vary due to visual design, some areas can also be customized per request.

Product	Dimensions	Max File Size
Company Collection	300 x 400 (lifestyle photos, standard product)	40k
Platform	450 x 320 (log-in)	40k
	152 x 152 pixels (left rail images)	20k
GoalQuest	155 x 2000 pixels (tiling BG)	
GoalQuesti	1280 x 200 pixels (tiling BG)	
	1200 x 155 pixels (top image)	
ThankQ Collection	Tiling BG image- pixel and file (k) size can vary	

Travel Programs

Event Ticket Club	100 x 100 pixels (thumbnail)
Direct Connection,	
Onvoy, Flight certificates	500 x 200 pixels (lifestyle)

Format

- .gif for logos, .jpg for photos

Printing standards

- HTML pages with all navigation elements removed designed to fit on a standard 8½ x 11 sheet.

Appendix B – Example Site Content

Welcome Story Example 1

Welcome!

Your success and our success as a company is the direct result of every employee's contributions and efforts. Everything you do on a daily basis has an impact on our business. That's why we're introducing you to the 123 Recognition program. The 123 Recognition program rewards you for aligning your performance with our business goals. And it's a way for us to simply say "Thank You for your contributions!"

As a participant in the 123 Reward and Recognition program you have the opportunity to earn points called AwardperQs® for your achievements. AwardperQs will be stored in your very own personal rewards account that you can access via the `My Account` tab on this page.

Welcome Story Example 2

Welcome!

The success of Green is Good is the direct result of every employee. Everything you do on a daily basis has an impact on our business. And that's why we're introducing You Make It Happen, a program to recognize and reward employees for producing results. The You Make It Happen program rewards you for aligning your performance with our overall business goals. And it's also a way for you to recognize and say "Thanks" to each other!

Welcome Story Example 3

Welcome to your Rewards and Recognition Program! Everything is at your fingertips: program rules, program newsletter, your personal account statement, quizzes, the online awards album, and more!

Remember, the more you participate and reach your objectives, the more awards will come your way. Check out the program rules for more information.

If you have any questions about the program, please contact your program administrator. Thank you and best wishes for the upcoming year.

Rules

Example Rules 1

Award Program 123

Recognizes top-performing individuals and/or teams for their significant contribution to the corporation based on their performance measures as related to the business initiatives.

Involvement

Employees or teams nominated by management for significant contributions in corporate business initiatives:

- Change
- Quality
- Robust growth
- Cost management
- Innovation
- People development
- Safety
- Customer service/delivery

Who's Eligible?

All full-time and part-time employees, except top executives and Selection Committee members. May self-nominate.

Employees and managers will have access to the nomination forms to nominate individuals or teams that have made significant contributions toward our business initiatives.

Selection Committee will identify annual award recipient(s).

AwardperQs are deposited into the recipients' accounts.

Up to 25 award recipients will also have an opportunity to travel to the annual awards banquet.

FAQs

Example FAQs

Q. Why is our company implementing an employee reward and recognition program?

A. Maytag is committed to rewarding employee performance that supports our business priorities - growing the business, diversifying the business, developing more innovative products, and focusing on our corporate values (quality, integrity, innovation, financial discipline and brand heritage).

Q. Who is eligible to participate?

A. All active regular full-time, regular part-time, incidental, and regular term employees are eligible to participate. Contractors, temporary employees, and contingent employees are NOT eligible.

Q. How do I participate and earn awards?

A. You can earn awards by engaging in performance that supports our corporate values and business initiatives. Click on the PROGRAM RULES button for specific information.

You can also participate by recognizing your peers and managers for going above and beyond in their daily jobs.

Other FAQs you may want to include:

- What are AwardperQs?
- What types of awards can I earn?
- Can I transfer my AwardperQs to a co-worker?
- When are AwardperQs deposited into my account?
- Where do I find my AwardperQs balance?
- Can AwardperQs be redeemed for cash?
- When will I receive my award?
- Will I have to pay taxes on any awards earned?

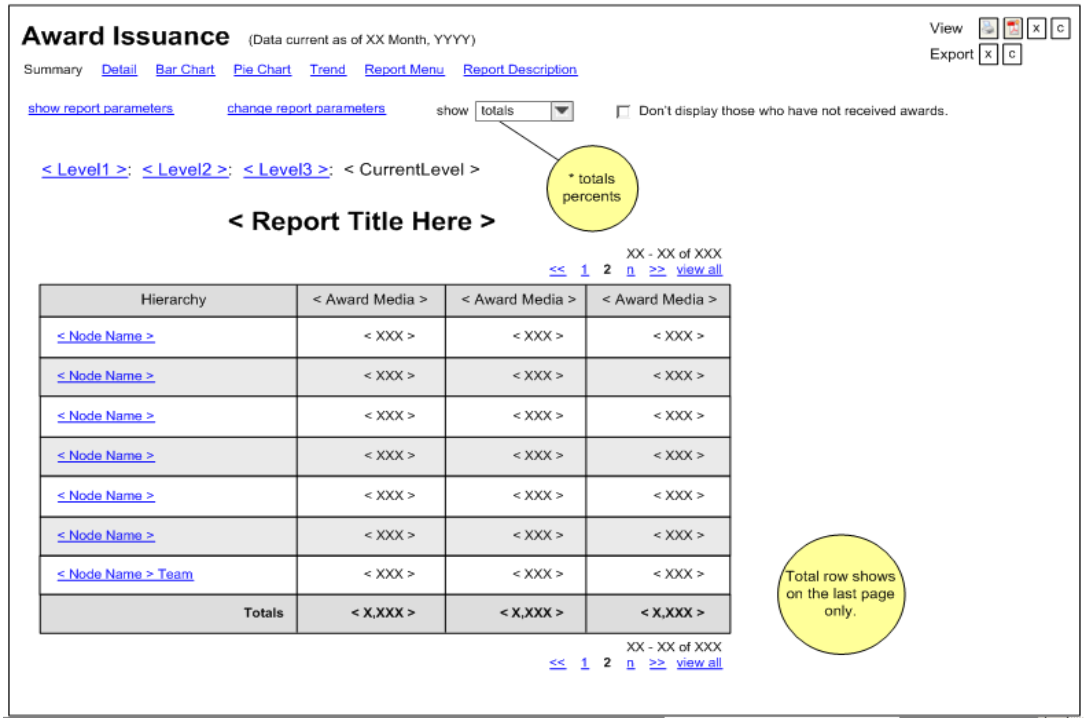
Appendix C – Report Layouts

All of the Platform reports use the following shortcut buttons for viewing and emailing:

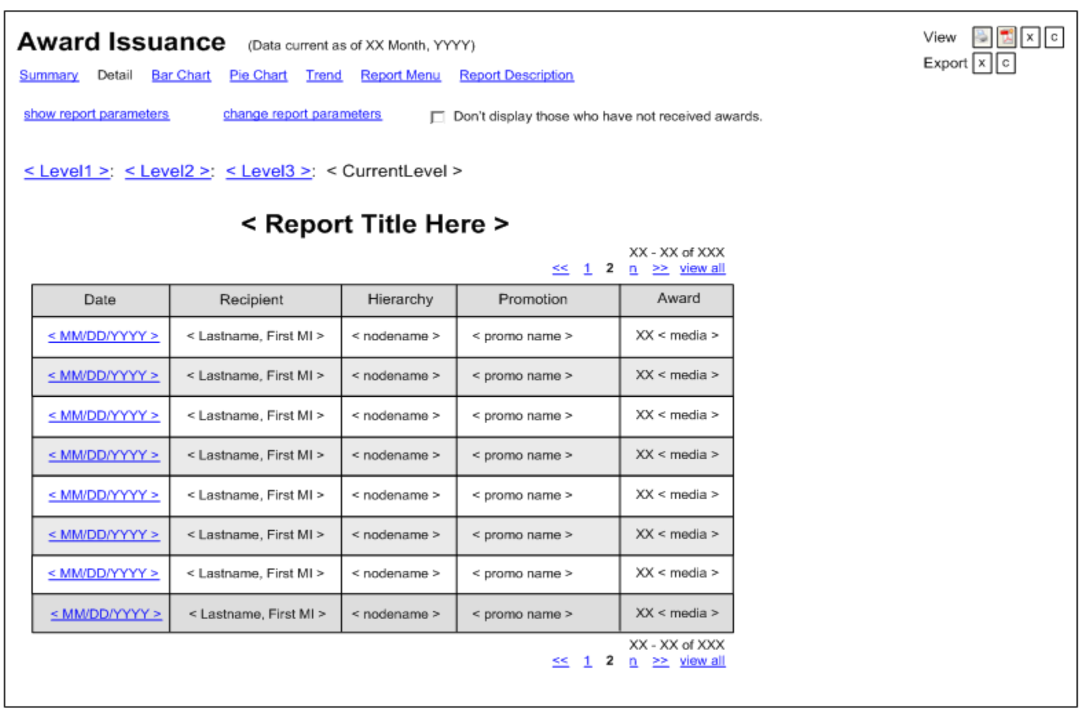
View:	
	opens print-friendly (HTML) version of current report view only in a popup window with Print and Close Window buttons
	generates PDF of current report view only; Acrobat opens in a separate window
X	generates Excel spreadsheet of current report view only; Excel opens in a separate window
C	generates csv of current view only and opens program associated to csv by that user in a separate window
Email:	
	generates PDF of current report view with all records for that node and below and emails it to the user
X	generates Excel spreadsheet of current report view with all records for that node and below and emails it to the user
C	generates csv of current view with all records for that node and below and opens program associated to csv by that user and emails it to the user
Report Description:	
?	opens report description in a popup window with a Close Window button

AwardperQs

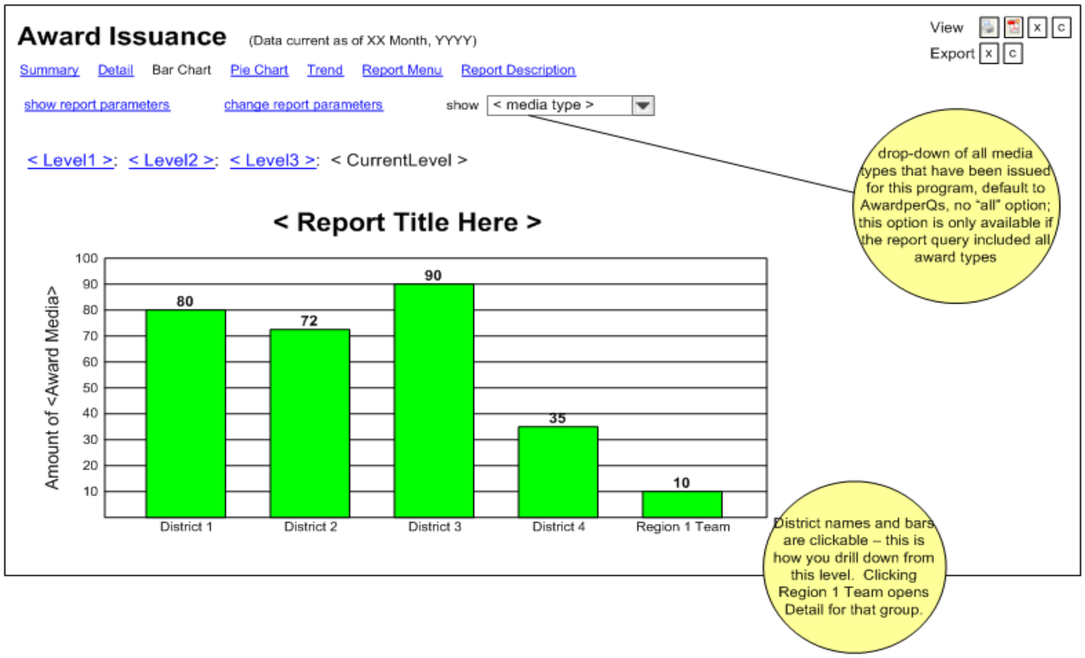
Award Issuance Summary



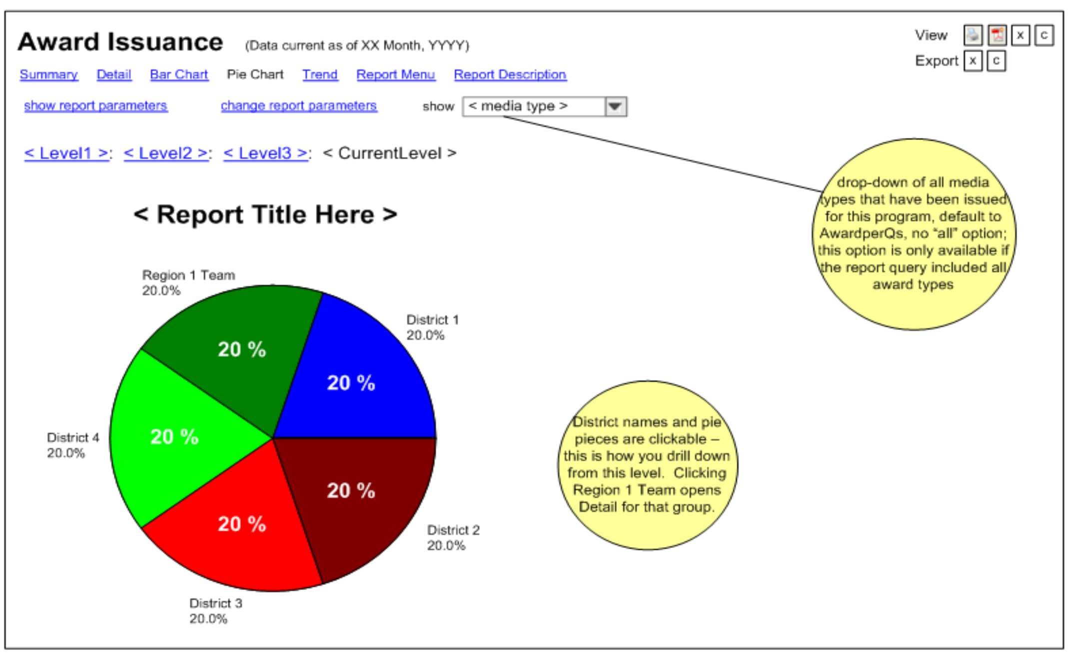
Award Issuance Detail



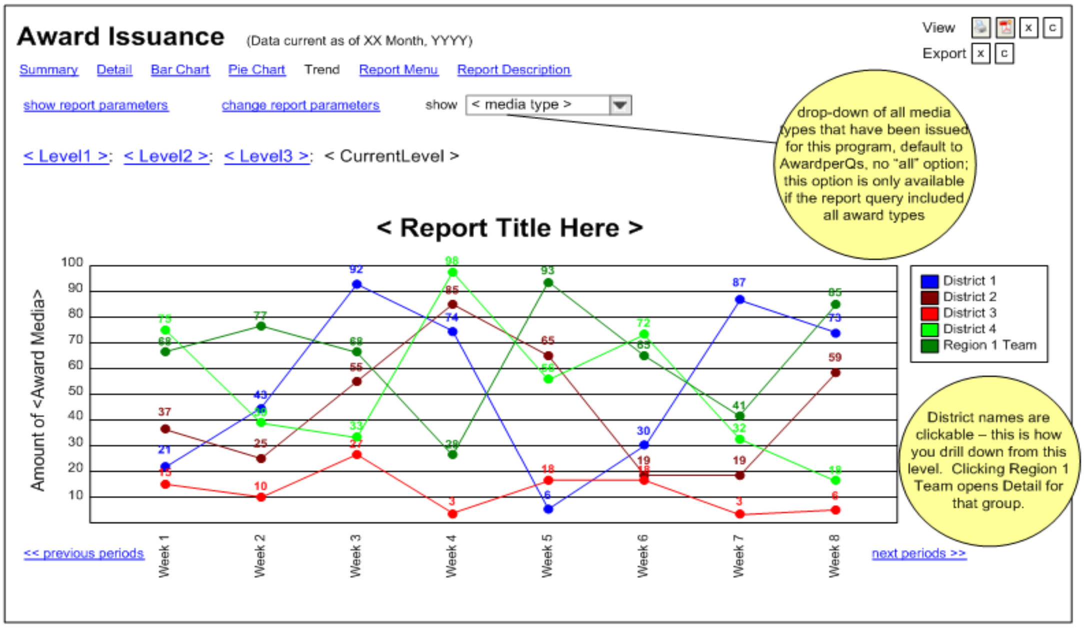
Award Issuance Bar Chart



Award Issuance Pie Chart

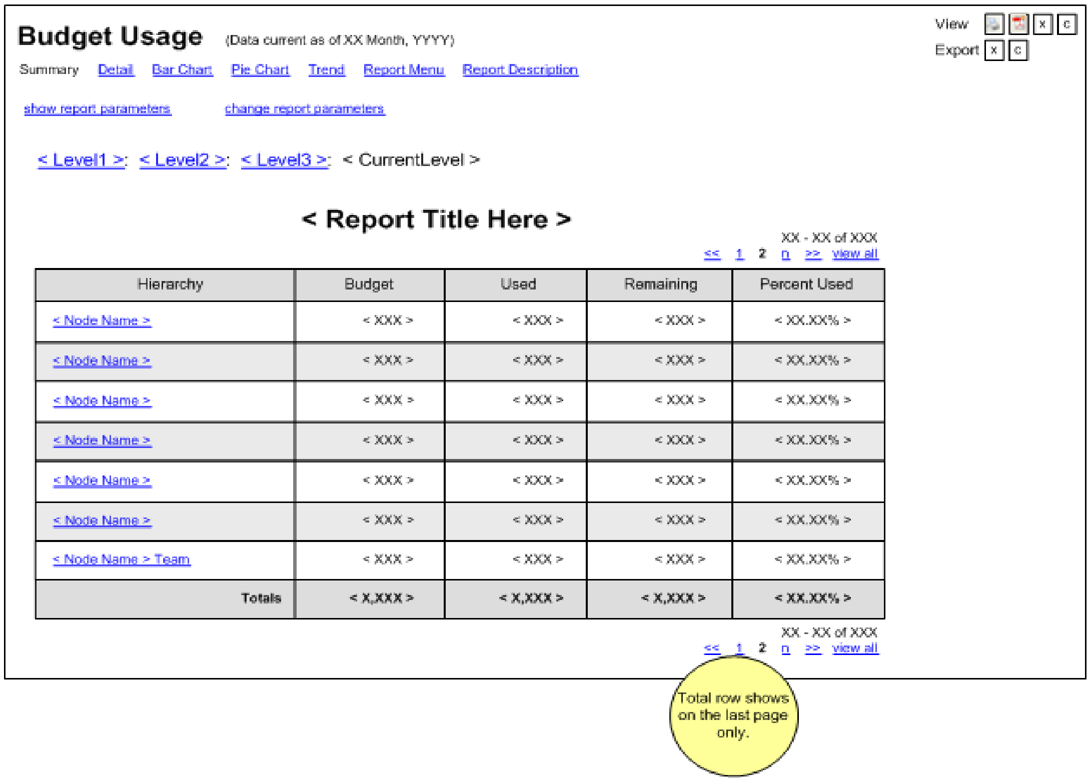


Award Issuance Trend Analysis

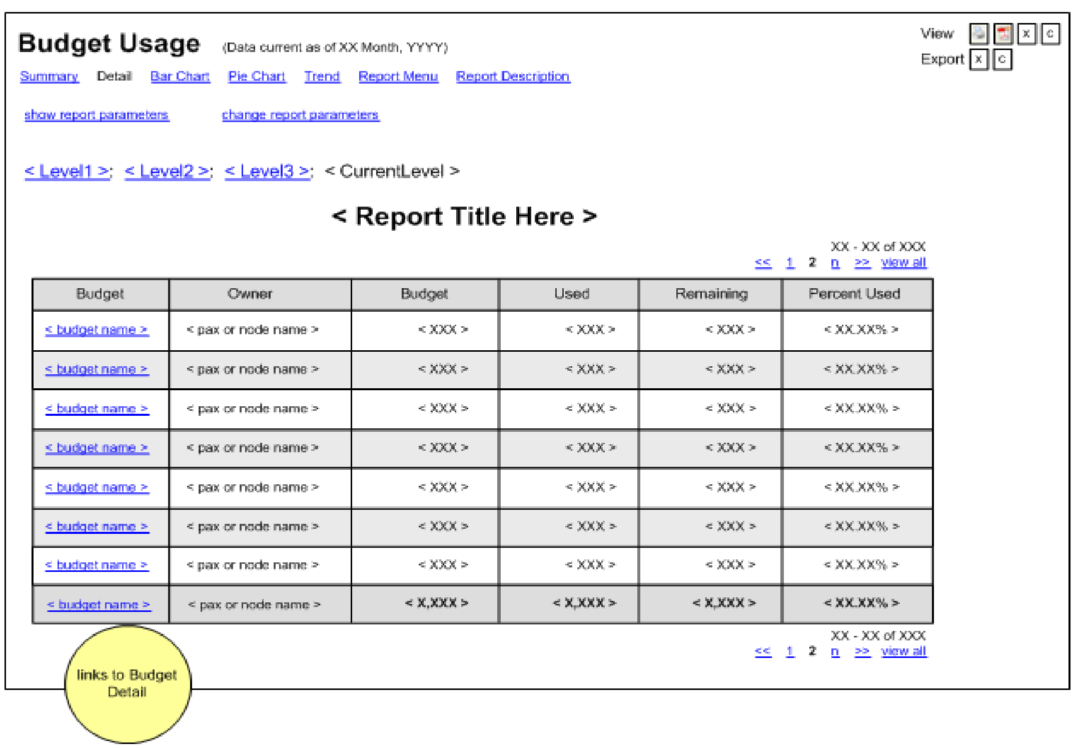


Budgets

Budget Usage Summary

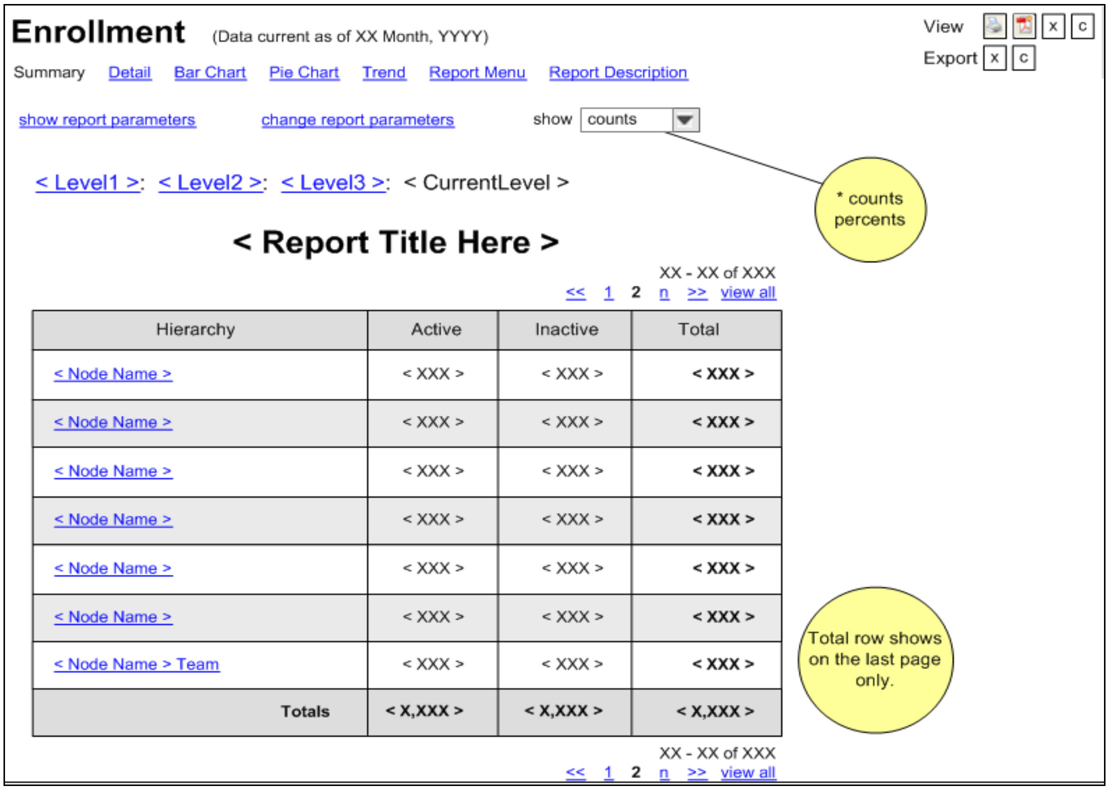


Budget Usage Detail



Enrollment

Enrollment Summary



Enrollment (Data current as of XX Month, YYYY)

View

Export

Summary Detail Bar Chart Pie Chart Trend Report Menu Report Description

show report parameters change report parameters show counts

* counts
percents

< Level1 >: < Level2 >: < Level3 >: < CurrentLevel >

< Report Title Here >

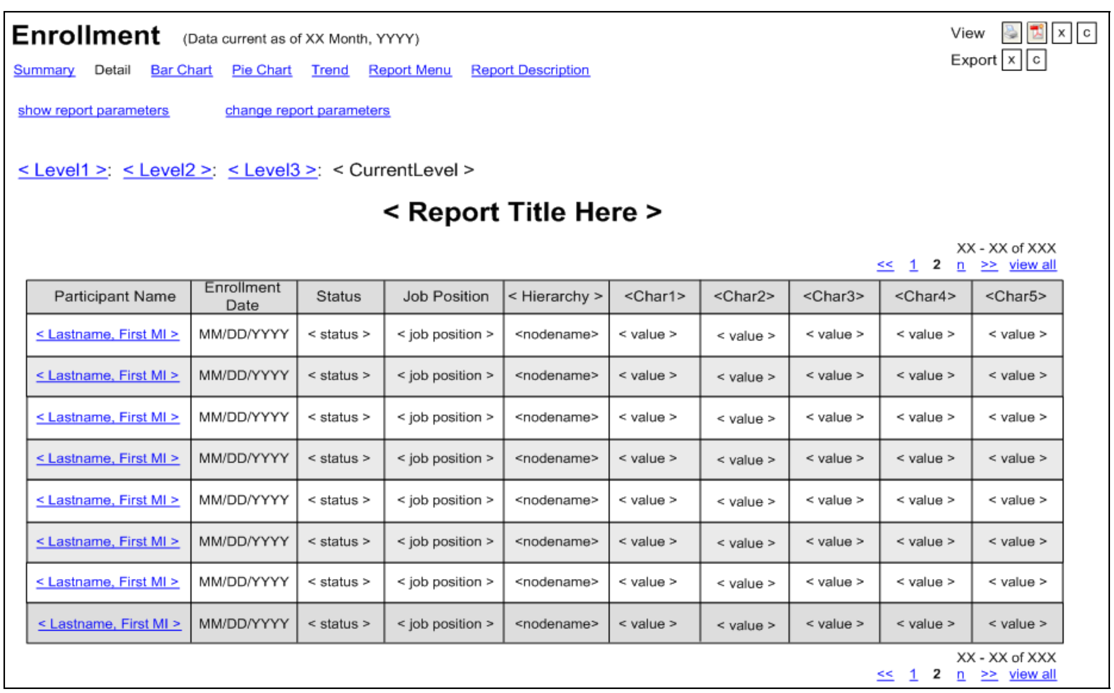
XX - XX of XXX
<< 1 **2** n >> view all

Hierarchy	Active	Inactive	Total
< Node Name >	< XXX >	< XXX >	**< XXX >**
< Node Name >	< XXX >	< XXX >	**< XXX >**
< Node Name >	< XXX >	< XXX >	**< XXX >**
< Node Name >	< XXX >	< XXX >	**< XXX >**
< Node Name >	< XXX >	< XXX >	**< XXX >**
< Node Name >	< XXX >	< XXX >	**< XXX >**
< Node Name > Team	< XXX >	< XXX >	**< XXX >**
Totals	**< X,XXX >**	**< X,XXX >**	**< X,XXX >**

Total row shows on the last page only.

XX - XX of XXX
<< 1 **2** n >> view all

Enrollment Detail



Enrollment (Data current as of XX Month, YYYY)

View

Export

Summary Detail Bar Chart Pie Chart Trend Report Menu Report Description

show report parameters change report parameters

< Level1 >: < Level2 >: < Level3 >: < CurrentLevel >

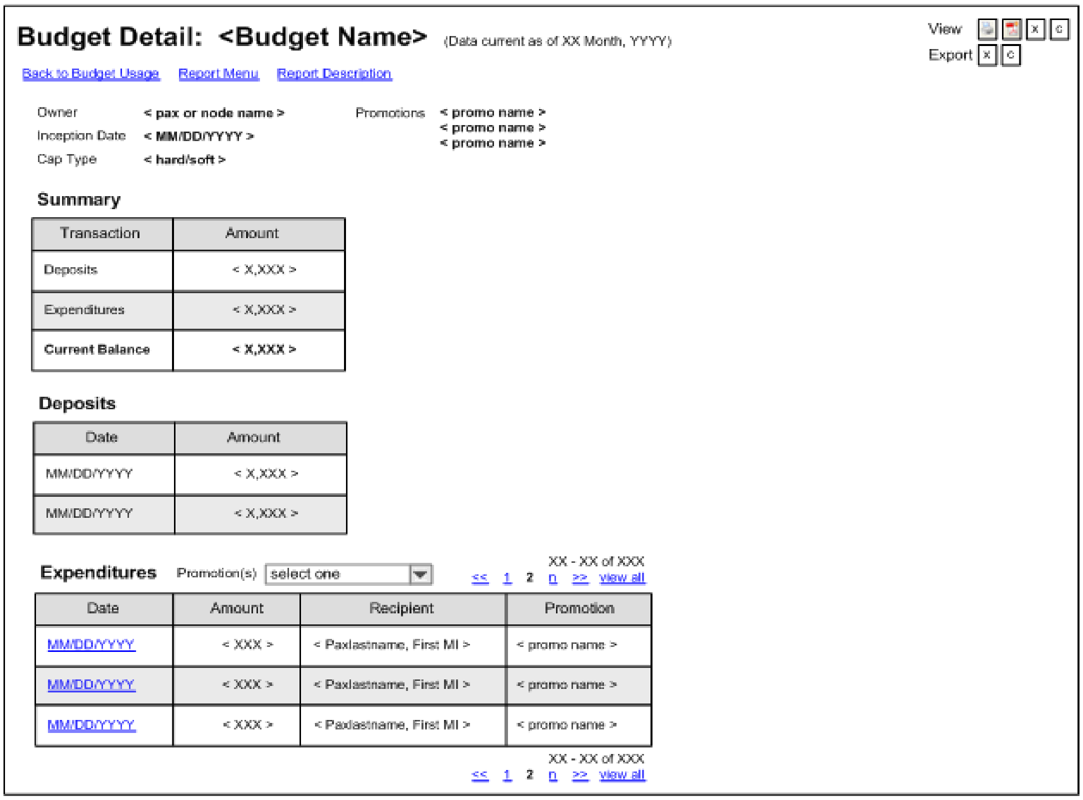
< Report Title Here >

XX - XX of XXX
<< 1 **2** n >> view all

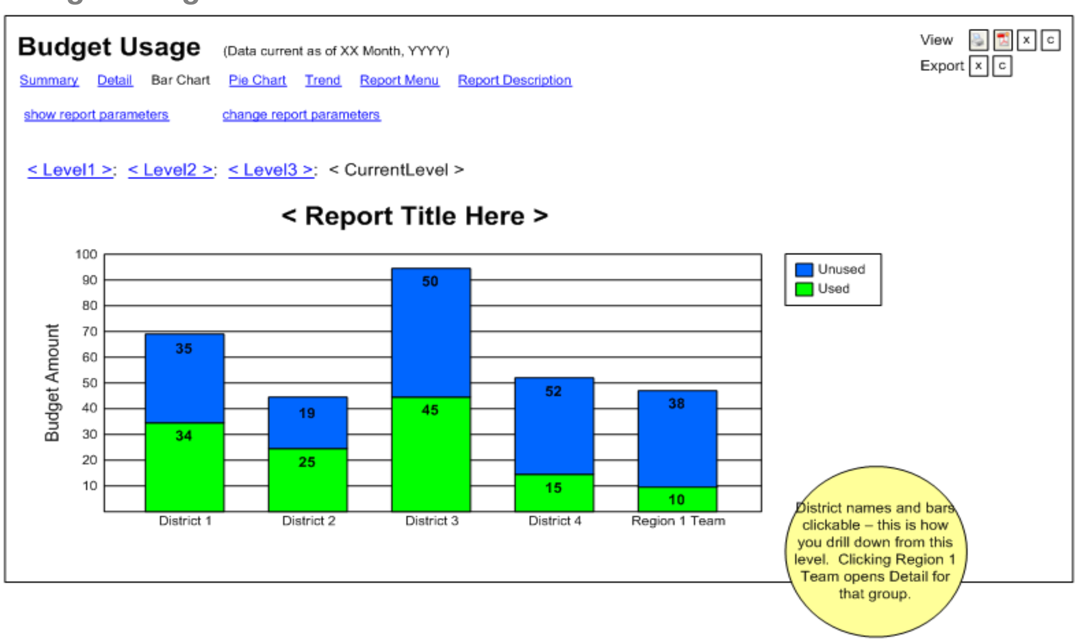
Participant Name	Enrollment Date	Status	Job Position	< Hierarchy >	<Char1>	<Char2>	<Char3>	<Char4>	<Char5>
< Lastname, First MI >	MM/DD/YYYY	< status >	< job position >	<nodename>	< value >	< value >	< value >	< value >	< value >
< Lastname, First MI >	MM/DD/YYYY	< status >	< job position >	<nodename>	< value >	< value >	< value >	< value >	< value >
< Lastname, First MI >	MM/DD/YYYY	< status >	< job position >	<nodename>	< value >	< value >	< value >	< value >	< value >
< Lastname, First MI >	MM/DD/YYYY	< status >	< job position >	<nodename>	< value >	< value >	< value >	< value >	< value >
< Lastname, First MI >	MM/DD/YYYY	< status >	< job position >	<nodename>	< value >	< value >	< value >	< value >	< value >
< Lastname, First MI >	MM/DD/YYYY	< status >	< job position >	<nodename>	< value >	< value >	< value >	< value >	< value >
< Lastname, First MI >	MM/DD/YYYY	< status >	< job position >	<nodename>	< value >	< value >	< value >	< value >	< value >
< Lastname, First MI >	MM/DD/YYYY	< status >	< job position >	<nodename>	< value >	< value >	< value >	< value >	< value >

XX - XX of XXX
<< 1 **2** n >> view all

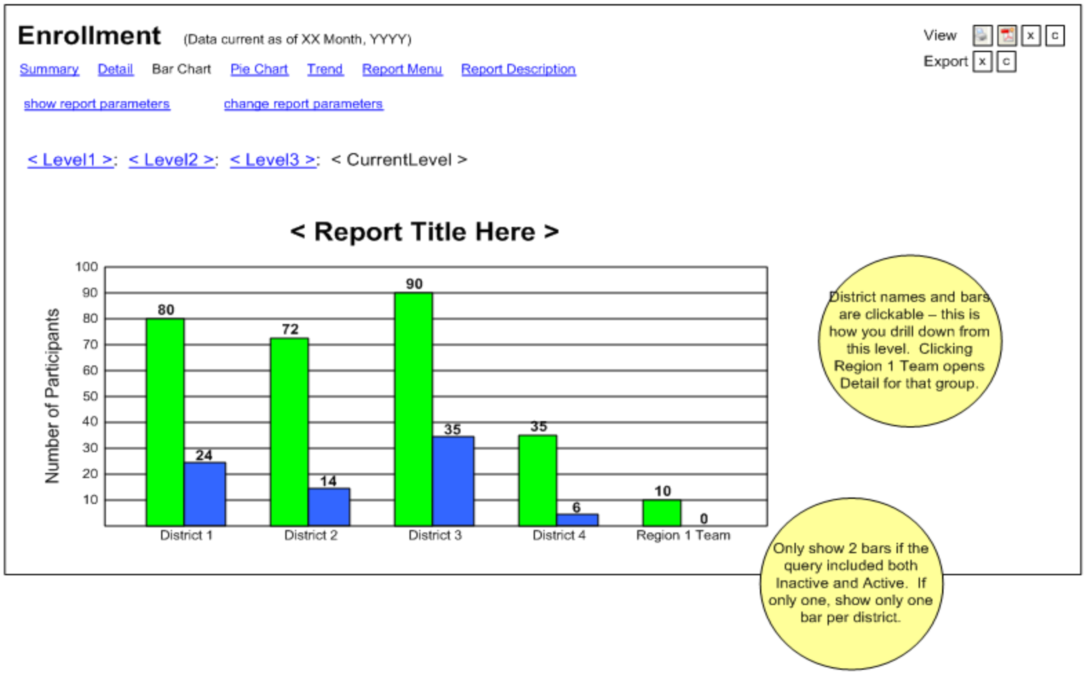
Budget Detail



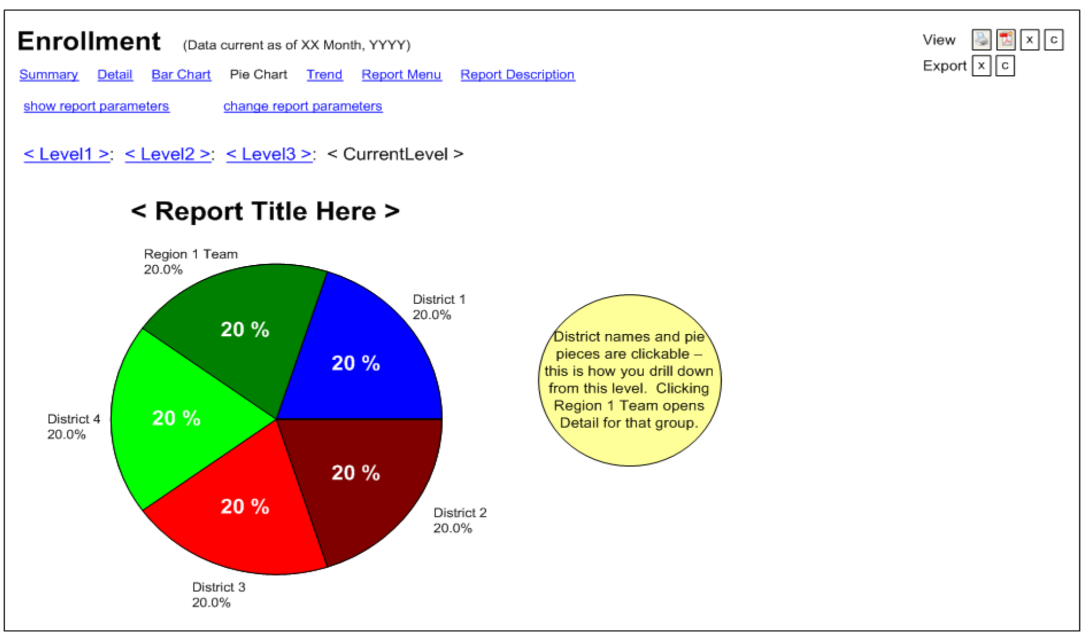
Budget Usage Bar Chart



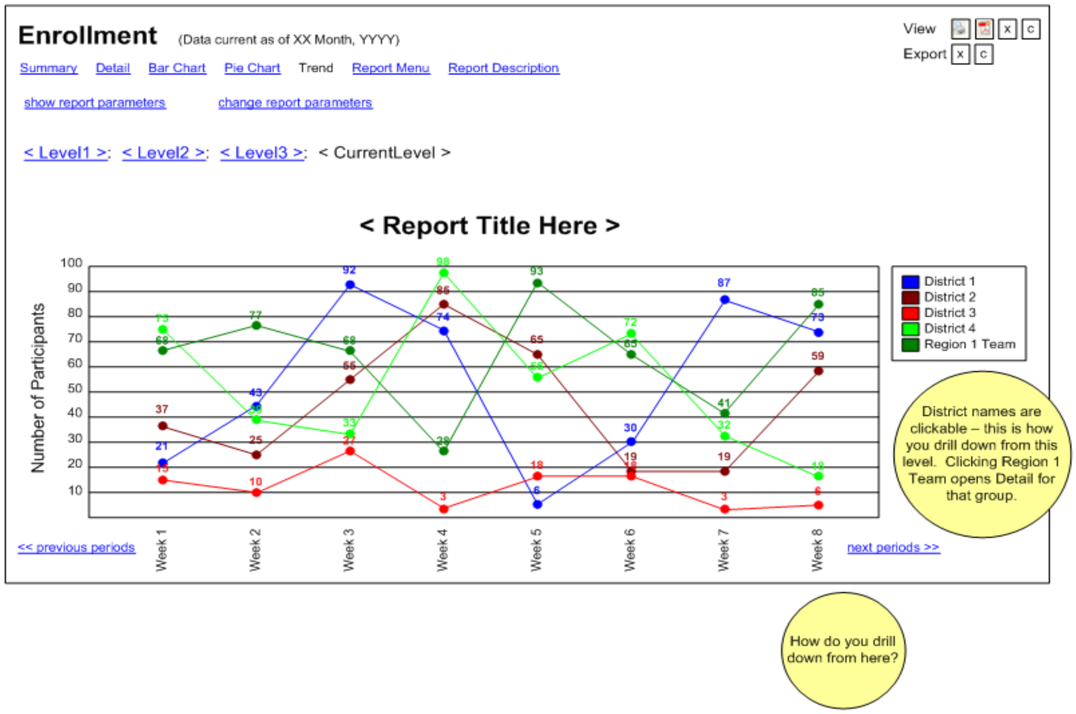
Enrollment Bar Chart



Enrollment Pie Chart

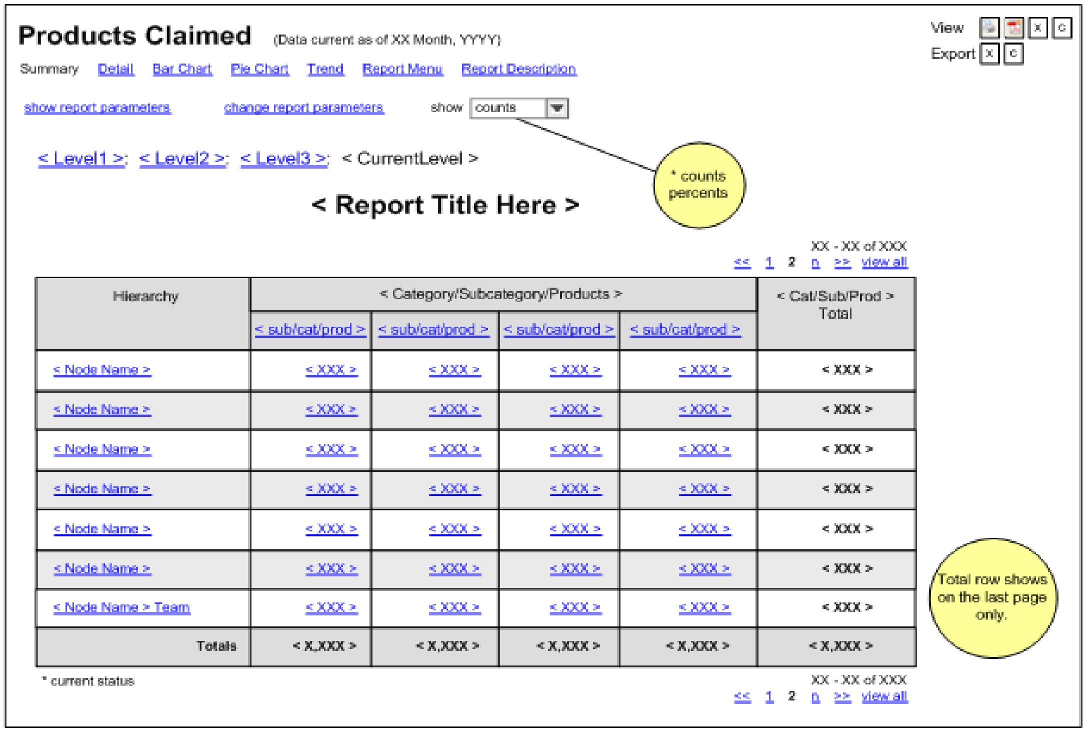


Enrollment Trend

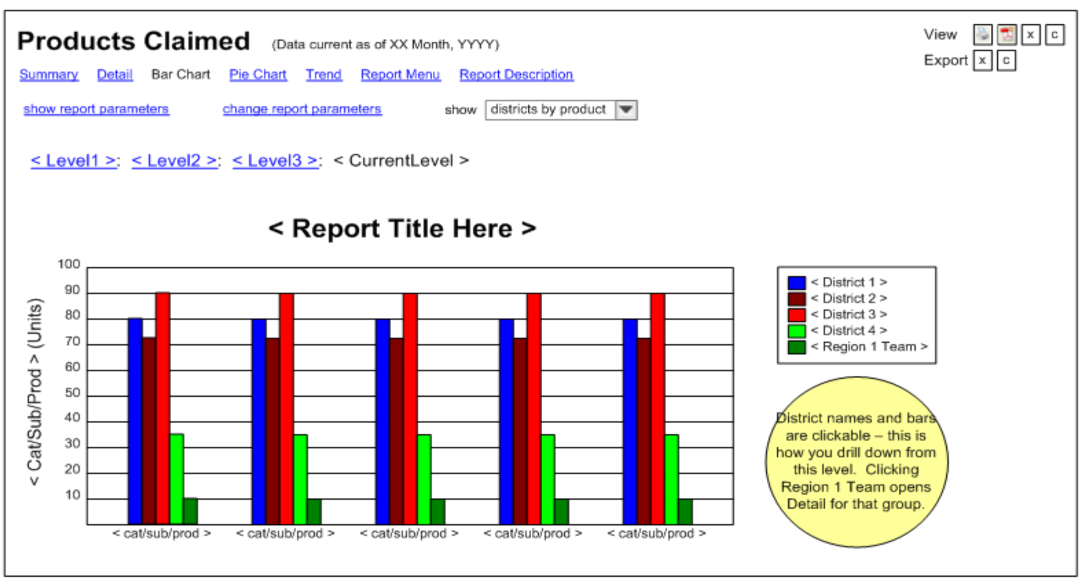


Product Claims

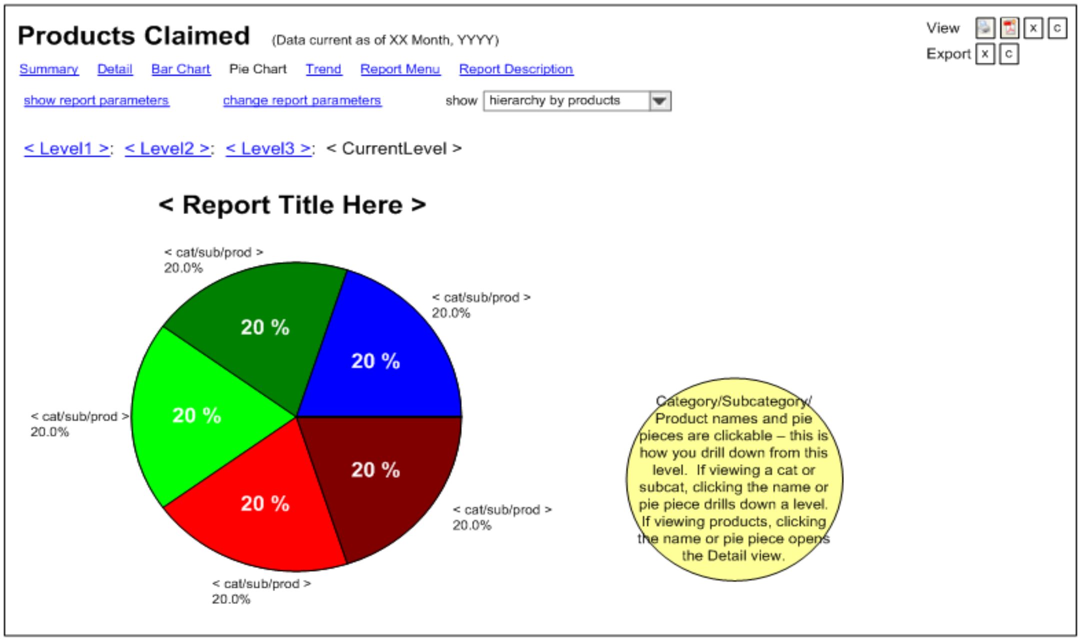
Products Claimed Summary



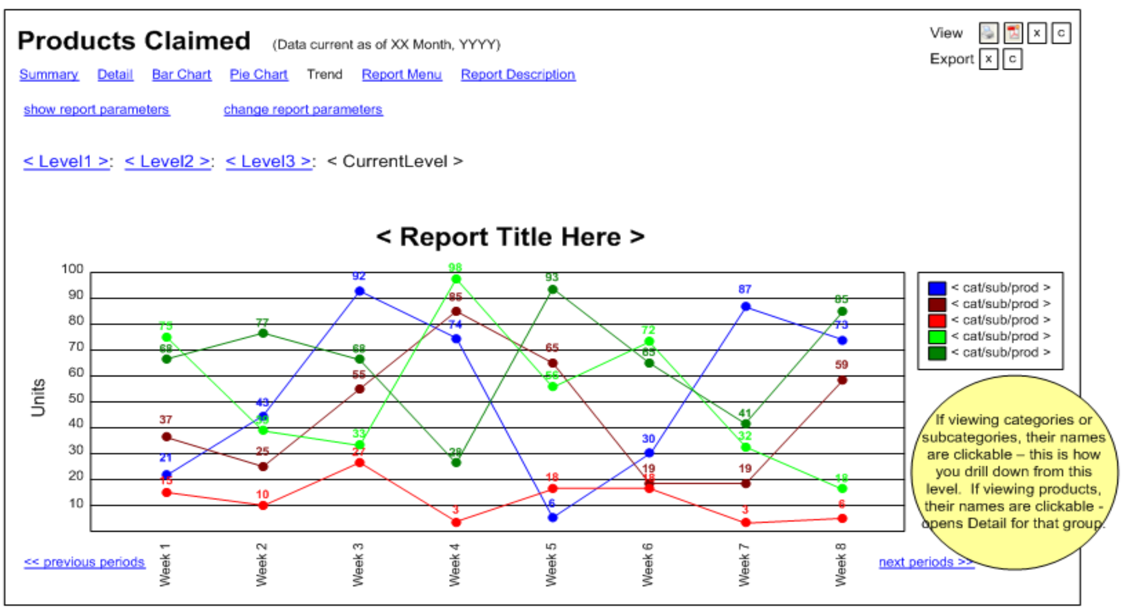
Products Claimed Bar Chart



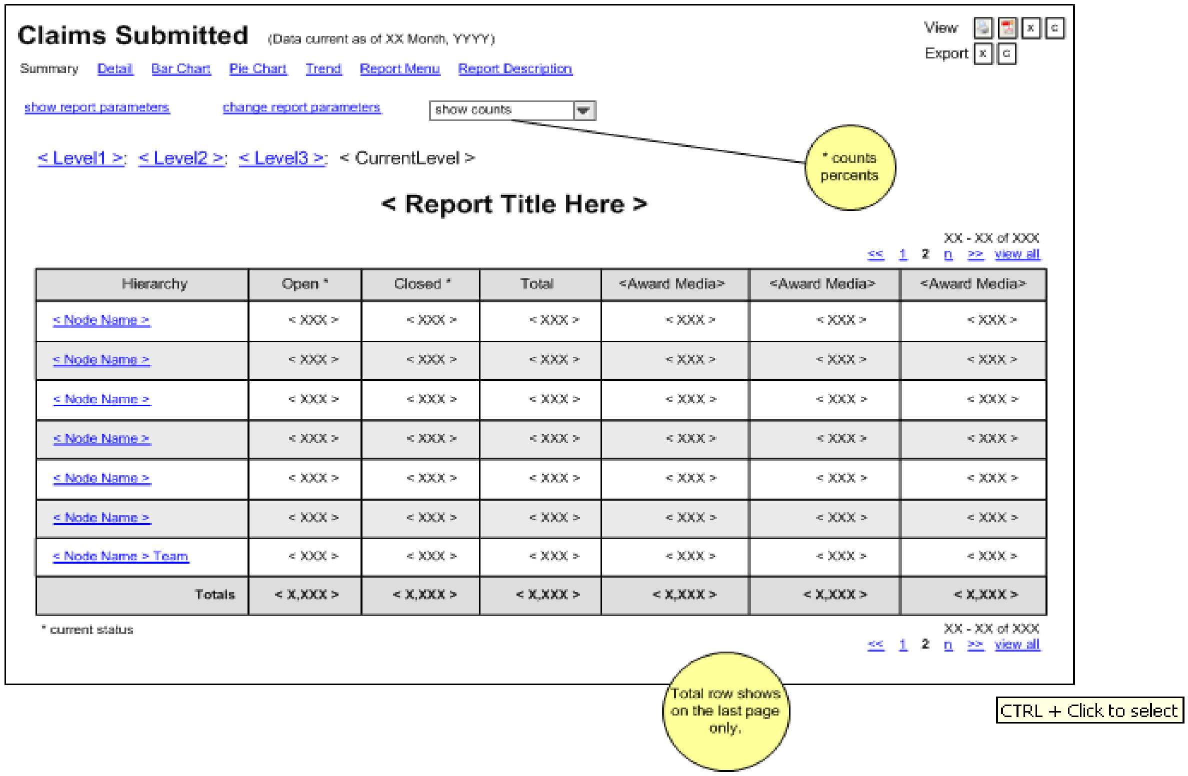
Products Claimed Pie Chart



Products Claimed Trend Analysis

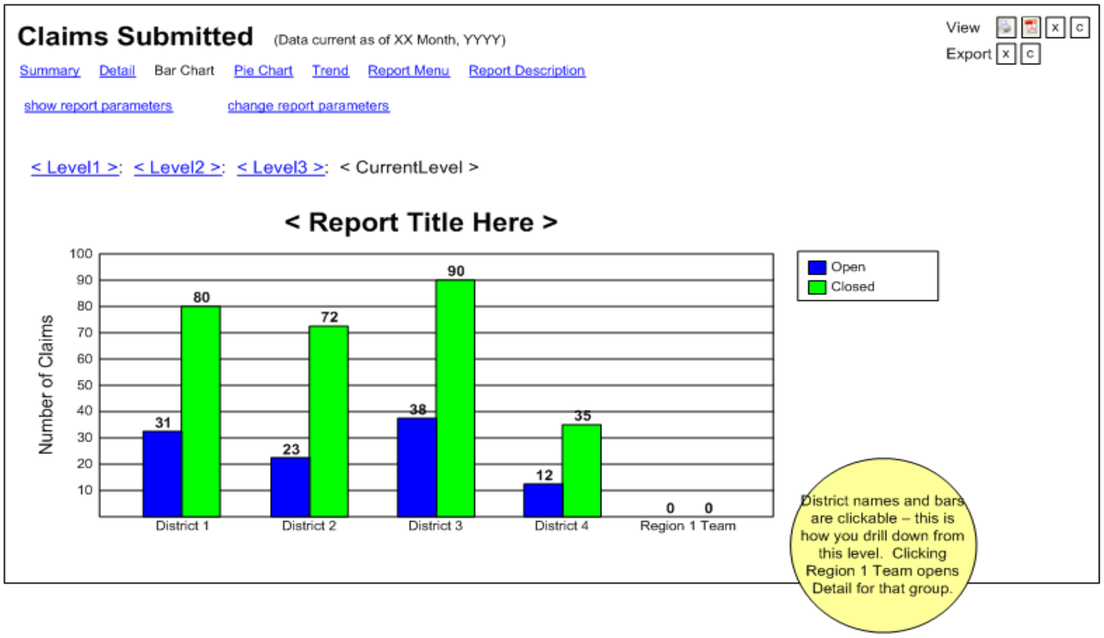


Claims Submitted Summary

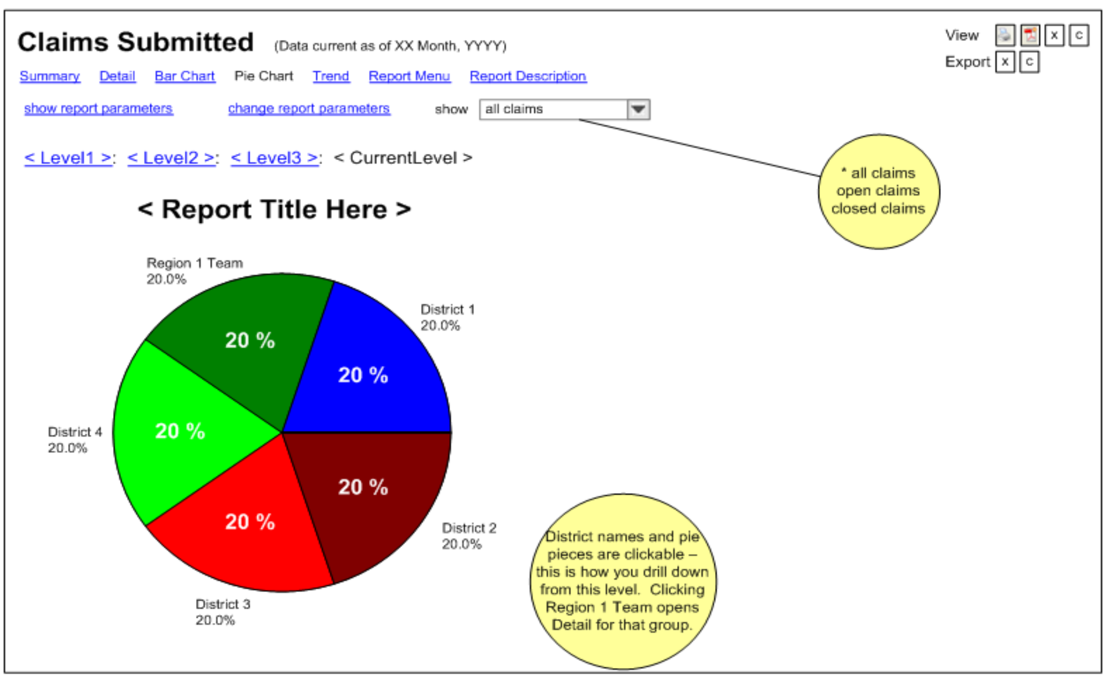


Claims Submitted Detail

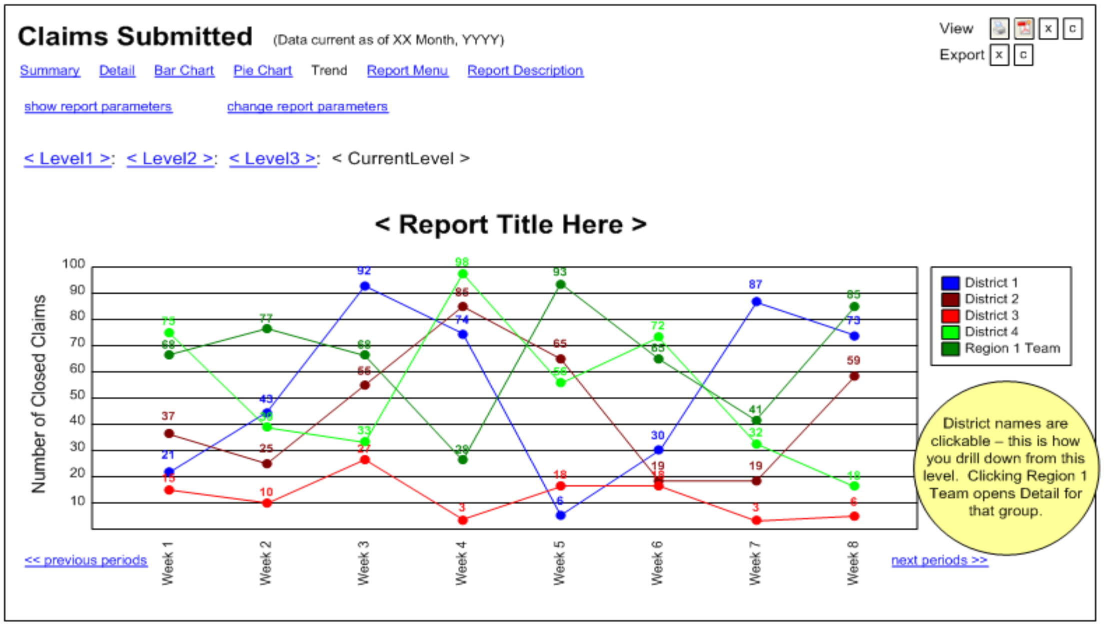
Claims Submitted Bar Chart



Claims Submitted Pie Chart



Claims Submitted Trend Analysis



Recognition

Recognition Activity Summary – Given

Recognition Given (Data current as of XX Month, YYYY)

View Export

Summary Detail Bar Chart Pie Chart Trend Report Menu Report Description

show report parameters change report parameters show counts

< Level1 >: < Level2 >: < Level3 >: < CurrentLevel >

* counts percents

Show one column for each Award Type (APQs, cash, points) that has been issued.

< Report Title Here >

XX - XX of XXX
<< 1 **2** n >> view all

Hierarchy	Eligible Givers	Actual Givers	% Eligible Givers	Recognition Given	<Media> Given	<Media> Given	<Media> Given
< Node Name >	< XXX >	< XXX >	< XX.XX% >	< XX >	< XXX >	< XXX >	< XX.XX >
< Node Name >	< XXX >	< XXX >	< XX.XX% >	< XX >	< XXX >	< XXX >	< XX.XX >
< Node Name >	< XXX >	< XXX >	< XX.XX% >	< XX >	< XXX >	< XXX >	< XX.XX >
< Node Name >	< XXX >	< XXX >	< XX.XX% >	< XX >	< XXX >	< XXX >	< XX.XX >
< Node Name >	< XXX >	< XXX >	< XX.XX% >	< XX >	< XXX >	< XXX >	< XX.XX >
< Node Name >	< XXX >	< XXX >	< XX.XX% >	< XX >	< XXX >	< XXX >	< XX.XX >
< Node Name > Team	< XXX >	< XXX >	< XX.XX% >	< XX >	< XXX >	< XXX >	< XX.XX >
Totals	**< X,XXX >**	**< X,XXX >**	**< XX,XX% >**	**< XXX >**	**< X,XXX >**	**< X,XXX >**	**< XXX.XX >**

XX - XX of XXX
<< 1 **2** n >> view all

Total row shows on the last page only.

Recognition Activity Detail – Given

Recognition Given (Data current as of XX Month, YYYY)

View Export

Summary Detail Bar Chart Pie Chart Trend Report Menu Report Description

show report parameters change report parameters

< Level1 >: < Level2 >: < Level3 >: < CurrentLevel >

< Report Title Here >

XX - XX of XXX
<< 1 **2** n >> view all

Date	Giver	Hierarchy	Recipient	Hierarchy	Promotion	Behavior	Award Given
< MM/DD/YYYY >	< Lastname, First MI >	< nodename >	< Lastname, First MI >	< nodename >	< promo name >	< behavior >	XX < media >
< MM/DD/YYYY >	< Lastname, First MI >	< nodename >	< Lastname, First MI >	< nodename >	< promo name >	< behavior >	XX < media >
< MM/DD/YYYY >	< Lastname, First MI >	< nodename >	< Lastname, First MI >	< nodename >	< promo name >	< behavior >	XX < media >
< MM/DD/YYYY >	< Lastname, First MI >	< nodename >	< Lastname, First MI >	< nodename >	< promo name >	< behavior >	XX < media >
< MM/DD/YYYY >	< Lastname, First MI >	< nodename >	< Lastname, First MI >	< nodename >	< promo name >	< behavior >	XX < media >
< MM/DD/YYYY >	< Lastname, First MI >	< nodename >	< Lastname, First MI >	< nodename >	< promo name >	< behavior >	XX < media >
< MM/DD/YYYY >	< Lastname, First MI >	< nodename >	< Lastname, First MI >	< nodename >	< promo name >	< behavior >	XX < media >
< MM/DD/YYYY >	< Lastname, First MI >	< nodename >	< Lastname, First MI >	< nodename >	< promo name >	< behavior >	XX < media >

XX - XX of XXX
<< 1 **2** n >> view all

Recognition Activity Summary – Received

Recognition Received (Data current as of XX Month, YYYY)

View Export

Summary Detail Bar Chart Pie Chart Trend Report Menu Report Description

show report parameters change report parameters show counts

* counts percents

Show one column for each Award Type (APQs, cash, points) that has been issued.

< Level1 >: < Level2 >: < Level3 >: < CurrentLevel >

< Report Title Here >

XX - XX of XXX
<< 1 2 n >> view all

Hierarchy	Eligible Recipients	Actual Recipients	% Eligible Recipients	Recognition Received	<Media> Received	<Media> Received	<Media> Received
< Node Name >	< XXX >	< XXX >	< XX.XX% >	< XX >	< XXX >	< XXX >	< XX.XX >
< Node Name >	< XXX >	< XXX >	< XX.XX% >	< XX >	< XXX >	< XXX >	< XX.XX >
< Node Name >	< XXX >	< XXX >	< XX.XX% >	< XX >	< XXX >	< XXX >	< XX.XX >
< Node Name >	< XXX >	< XXX >	< XX.XX% >	< XX >	< XXX >	< XXX >	< XX.XX >
< Node Name >	< XXX >	< XXX >	< XX.XX% >	< XX >	< XXX >	< XXX >	< XX.XX >
< Node Name >	< XXX >	< XXX >	< XX.XX% >	< XX >	< XXX >	< XXX >	< XX.XX >
< Node Name > Team	< XXX >	< XXX >	< XX.XX% >	< XX >	< XXX >	< XXX >	< XX.XX >
Totals	**< X,XXX >**	**< X,XXX >**	**< XX.XX% >**	**< XXX >**	**< X,XXX >**	**< X,XXX >**	**< XXX.XX >**

XX - XX of XXX
<< 1 2 n >> view all

Total row shows on the last page only.

Recognition Activity Detail – Received

Recognition Received (Data current as of XX Month, YYYY)

View Export

Summary Detail Bar Chart Pie Chart Trend Report Menu Report Description

show report parameters change report parameters

< Level1 >: < Level2 >: < Level3 >: < CurrentLevel >

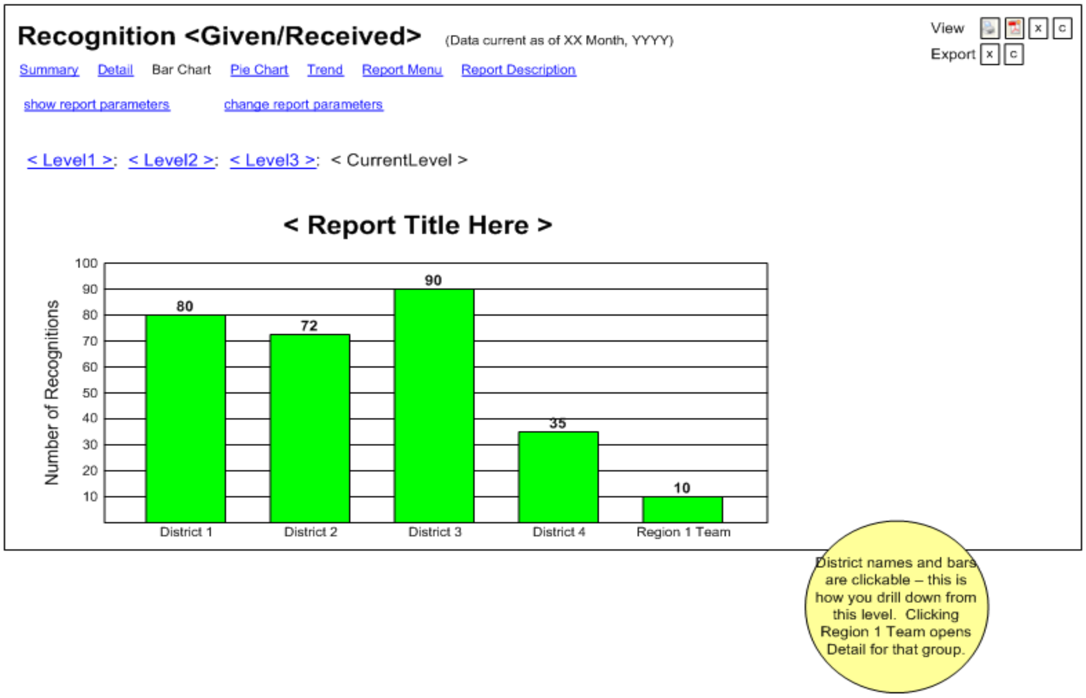
< Report Title Here >

XX - XX of XXX
<< 1 2 n >> view all

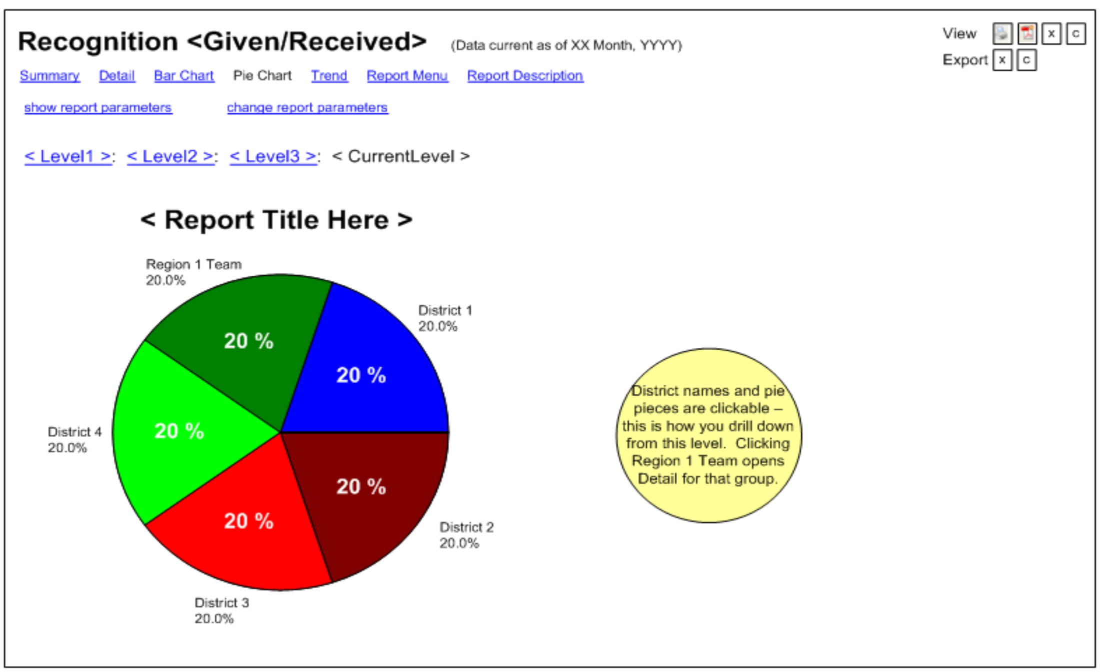
Date	Recipient	Hierarchy	Giver	Hierarchy	Promotion	Behavior	Award Given
< MM/DD/YYYY >	< Lastname, First MI >	< nodename >	< Lastname, First MI >	< nodename >	< promo name >	< behavior >	XX < media >
< MM/DD/YYYY >	< Lastname, First MI >	< nodename >	< Lastname, First MI >	< nodename >	< promo name >	< behavior >	XX < media >
< MM/DD/YYYY >	< Lastname, First MI >	< nodename >	< Lastname, First MI >	< nodename >	< promo name >	< behavior >	XX < media >
< MM/DD/YYYY >	< Lastname, First MI >	< nodename >	< Lastname, First MI >	< nodename >	< promo name >	< behavior >	XX < media >
< MM/DD/YYYY >	< Lastname, First MI >	< nodename >	< Lastname, First MI >	< nodename >	< promo name >	< behavior >	XX < media >
< MM/DD/YYYY >	< Lastname, First MI >	< nodename >	< Lastname, First MI >	< nodename >	< promo name >	< behavior >	XX < media >
< MM/DD/YYYY >	< Lastname, First MI >	< nodename >	< Lastname, First MI >	< nodename >	< promo name >	< behavior >	XX < media >
< MM/DD/YYYY >	< Lastname, First MI >	< nodename >	< Lastname, First MI >	< nodename >	< promo name >	< behavior >	XX < media >

XX - XX of XXX
<< 1 2 n >> view all

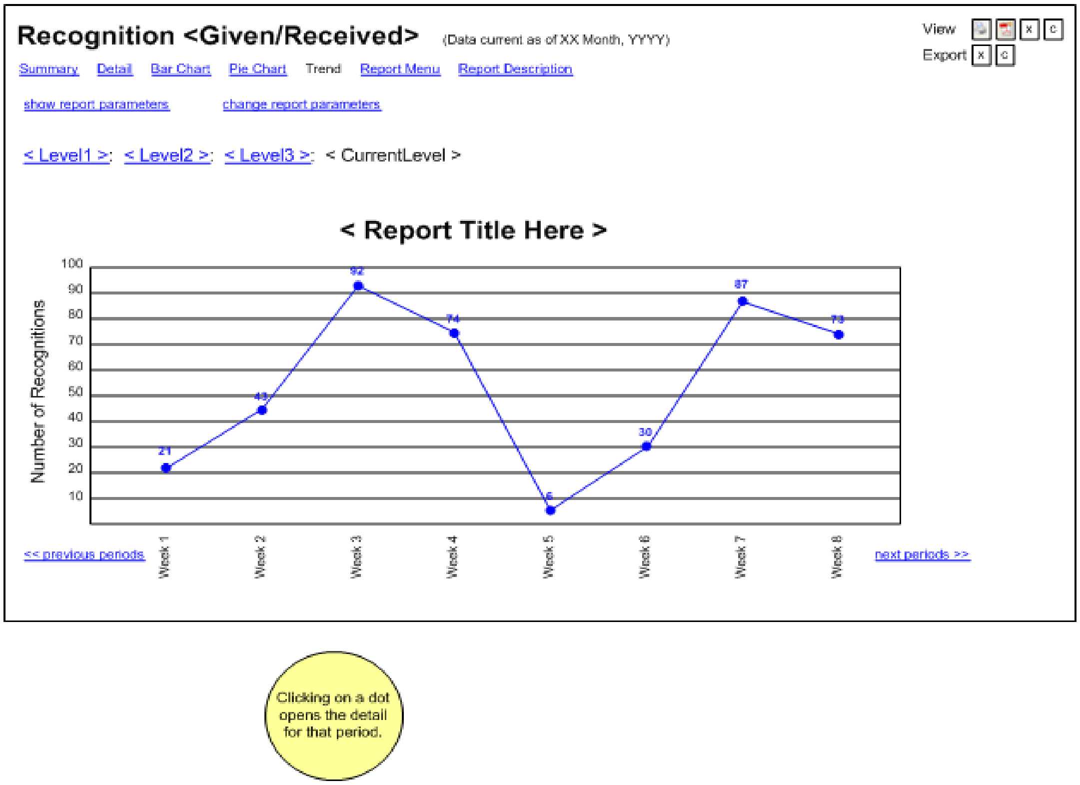
Recognition Activity Bar Chart



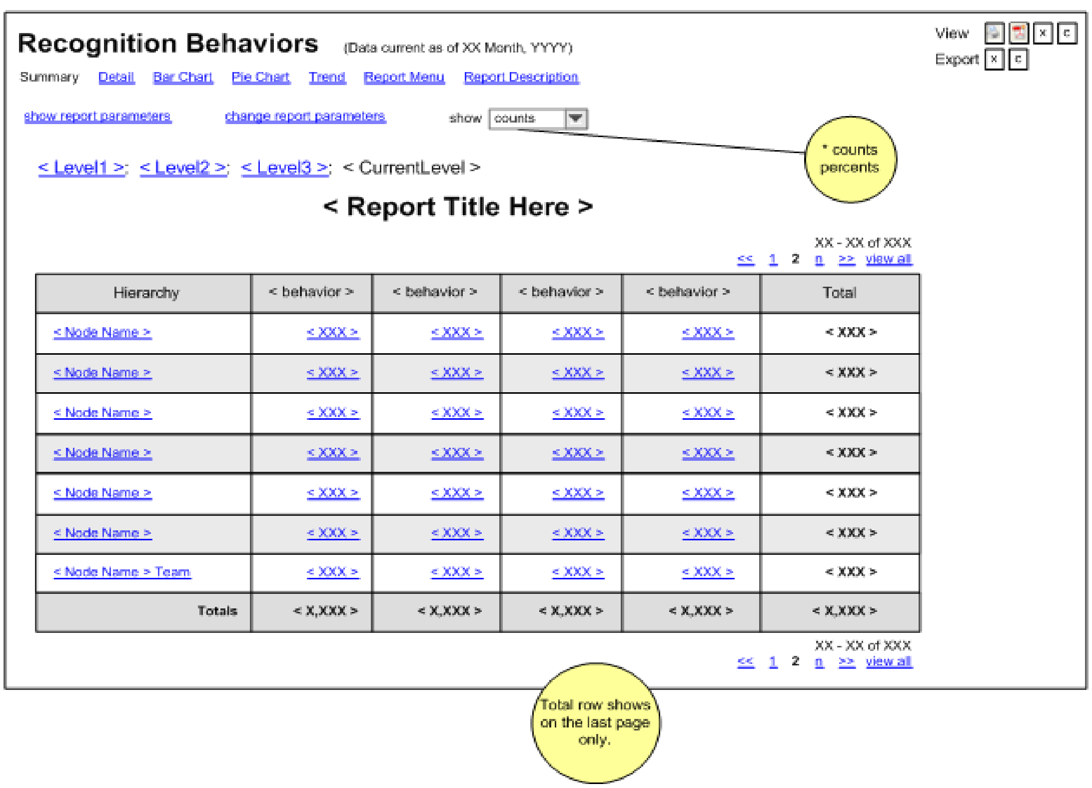
Recognition Activity Pie Chart



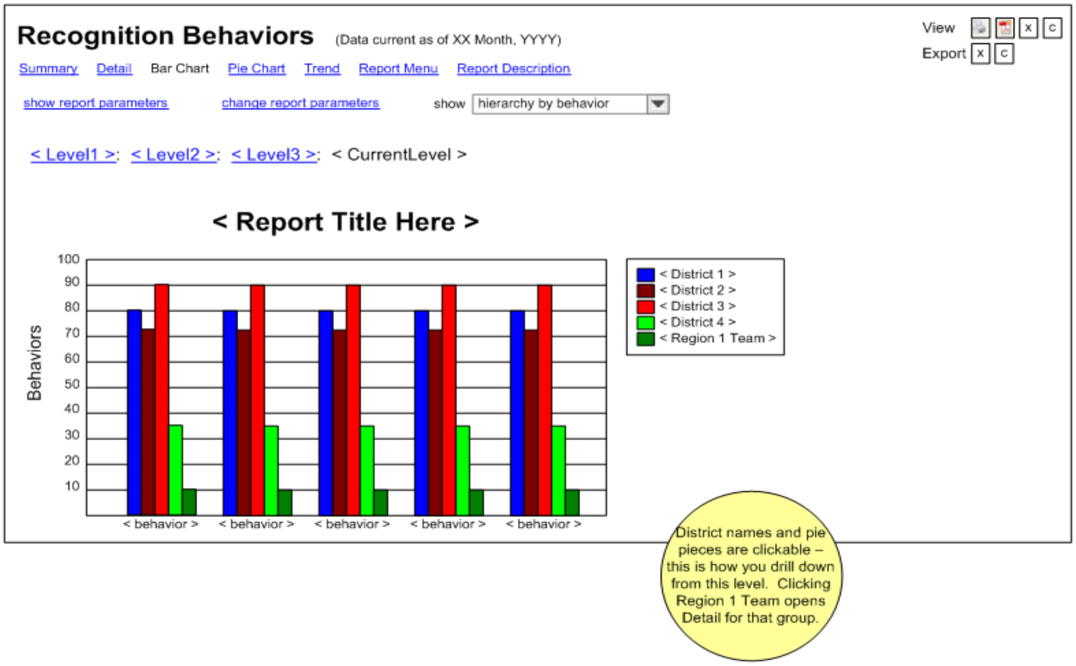
Recognition Activity Trend Analysis



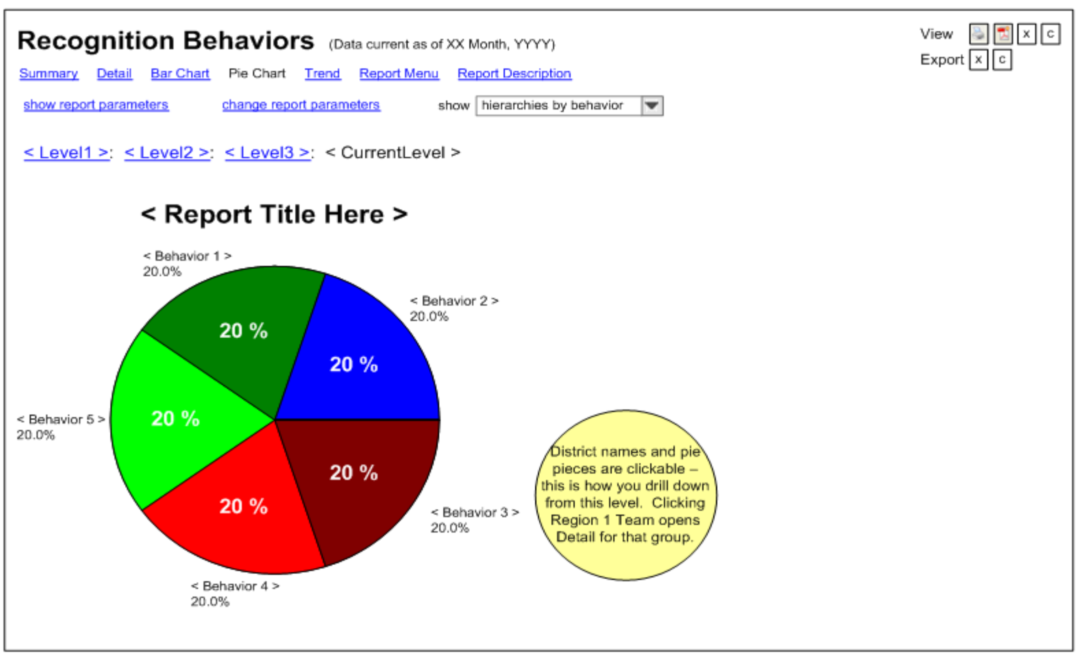
Recognition Behaviors Summary



Recognition Behaviors Bar Chart

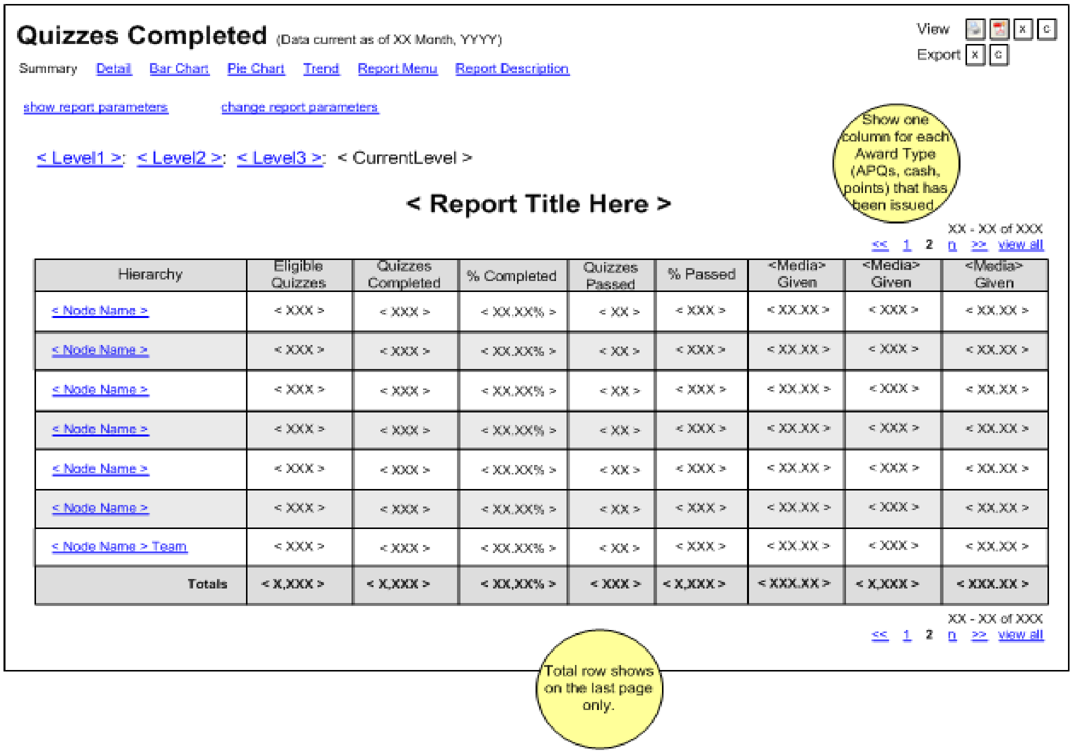


Recognition Behaviors Pie Chart



Quizzes

Quiz Activity Summary


Quizzes Completed (Data current as of XX Month, YYYY)

View Export

Summary Detail Bar Chart Pie Chart Trend Report Menu Report Description

show report parameters change report parameters

< Level1 >: < Level2 >: < Level3 >: < CurrentLevel >

Show one column for each Award Type (APQs, cash, points) that has been issued

< Report Title Here >

XX - XX of XXX

<< 1 2 n >> view all

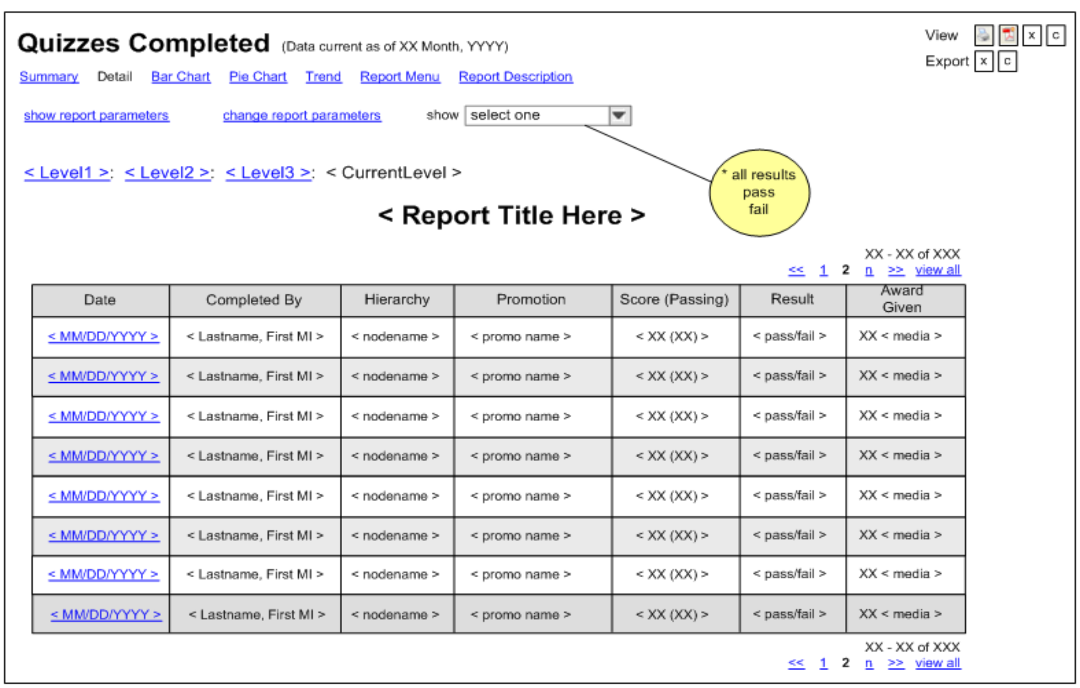
Hierarchy	Eligible Quizzes	Quizzes Completed	% Completed	Quizzes Passed	% Passed	<Media> Given	<Media> Given	<Media> Given
< Node Name >	< XXX >	< XXX >	< XX.XX% >	< XX >	< XXX >	< XX.XX >	< XXX >	< XX.XX >
< Node Name >	< XXX >	< XXX >	< XX.XX% >	< XX >	< XXX >	< XX.XX >	< XXX >	< XX.XX >
< Node Name >	< XXX >	< XXX >	< XX.XX% >	< XX >	< XXX >	< XX.XX >	< XXX >	< XX.XX >
< Node Name >	< XXX >	< XXX >	< XX.XX% >	< XX >	< XXX >	< XX.XX >	< XXX >	< XX.XX >
< Node Name >	< XXX >	< XXX >	< XX.XX% >	< XX >	< XXX >	< XX.XX >	< XXX >	< XX.XX >
< Node Name >	< XXX >	< XXX >	< XX.XX% >	< XX >	< XXX >	< XX.XX >	< XXX >	< XX.XX >
< Node Name > Team	< XXX >	< XXX >	< XX.XX% >	< XX >	< XXX >	< XX.XX >	< XXX >	< XX.XX >
Totals	**< X,XXX >**	**< X,XXX >**	**< XX.XX% >**	**< XXX >**	**< X,XXX >**	**< XXX.XX >**	**< X,XXX >**	**< XXX.XX >**

XX - XX of XXX

<< 1 2 n >> view all

Total row shows on the last page only.

Quiz Activity Detail


Quizzes Completed (Data current as of XX Month, YYYY)

View Export

Summary Detail Bar Chart Pie Chart Trend Report Menu Report Description

show report parameters change report parameters show select one

< Level1 >: < Level2 >: < Level3 >: < CurrentLevel >

* all results
pass
fail

< Report Title Here >

XX - XX of XXX

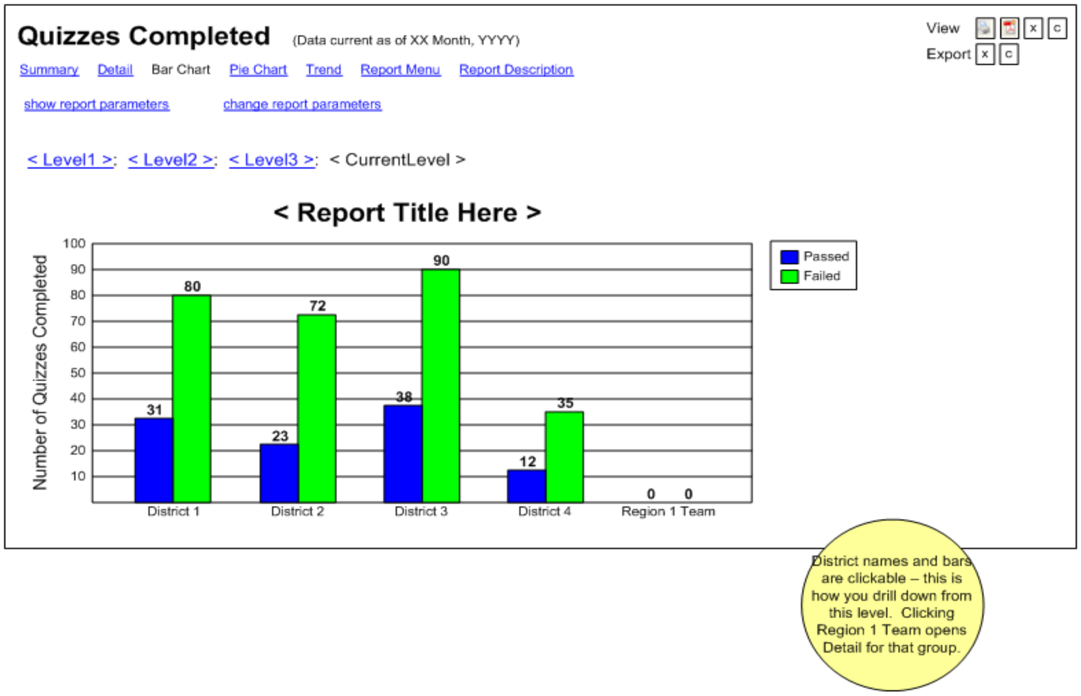
<< 1 2 n >> view all

Date	Completed By	Hierarchy	Promotion	Score (Passing)	Result	Award Given
< MM/DD/YYYY >	< Lastname, First MI >	< nodename >	< promo name >	< XX (XX) >	< pass/fail >	XX < media >
< MM/DD/YYYY >	< Lastname, First MI >	< nodename >	< promo name >	< XX (XX) >	< pass/fail >	XX < media >
< MM/DD/YYYY >	< Lastname, First MI >	< nodename >	< promo name >	< XX (XX) >	< pass/fail >	XX < media >
< MM/DD/YYYY >	< Lastname, First MI >	< nodename >	< promo name >	< XX (XX) >	< pass/fail >	XX < media >
< MM/DD/YYYY >	< Lastname, First MI >	< nodename >	< promo name >	< XX (XX) >	< pass/fail >	XX < media >
< MM/DD/YYYY >	< Lastname, First MI >	< nodename >	< promo name >	< XX (XX) >	< pass/fail >	XX < media >
< MM/DD/YYYY >	< Lastname, First MI >	< nodename >	< promo name >	< XX (XX) >	< pass/fail >	XX < media >
< MM/DD/YYYY >	< Lastname, First MI >	< nodename >	< promo name >	< XX (XX) >	< pass/fail >	XX < media >

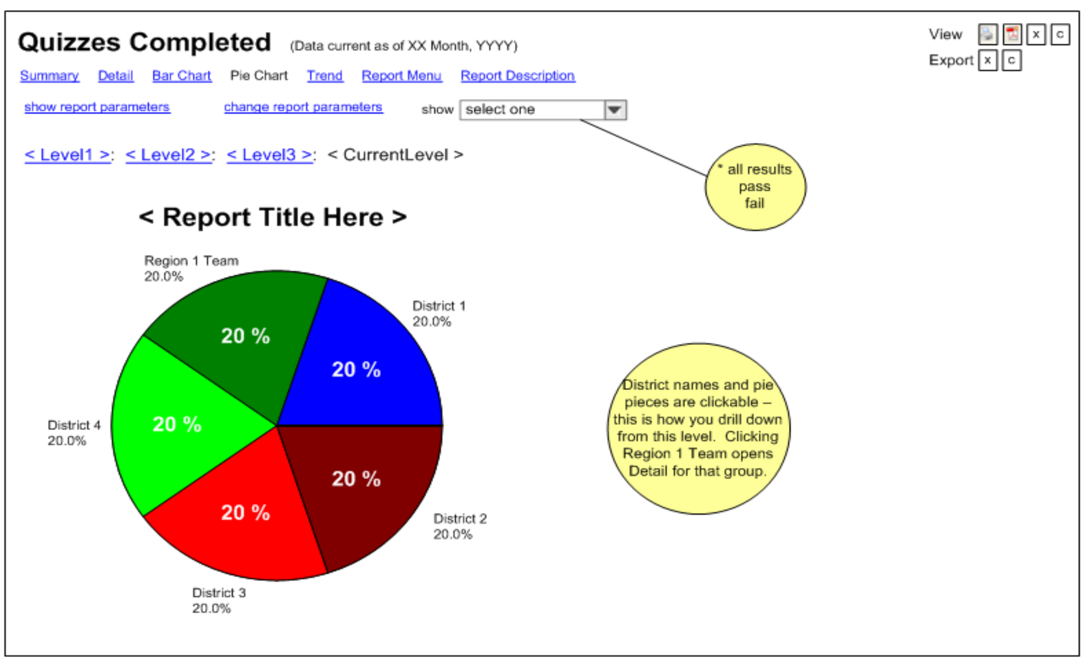
XX - XX of XXX

<< 1 2 n >> view all

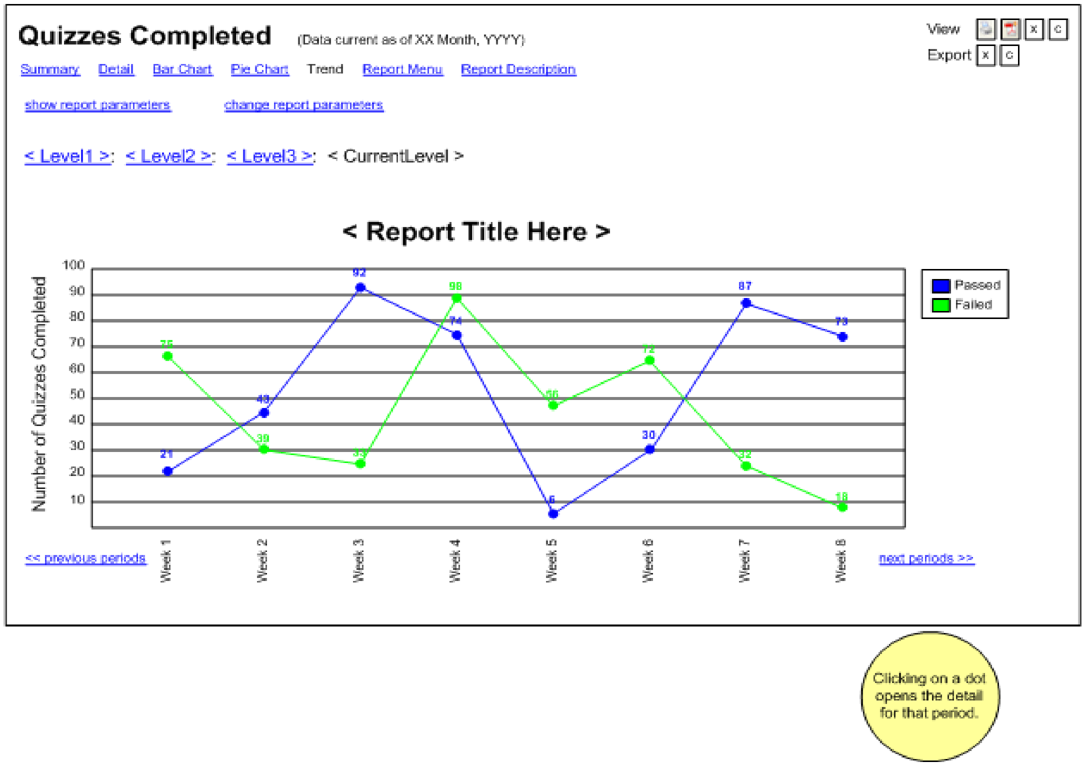
Quiz Activity Bar Chart



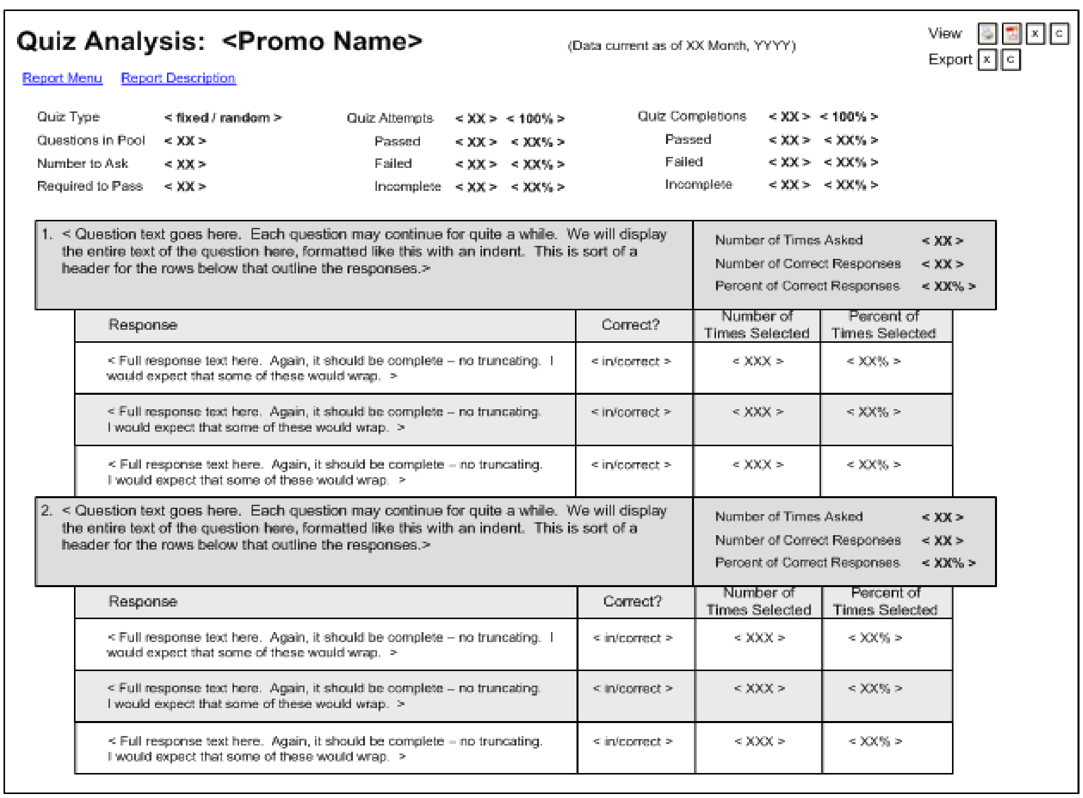
Quiz Activity Pie Chart



Quiz Activity Trend Analysis

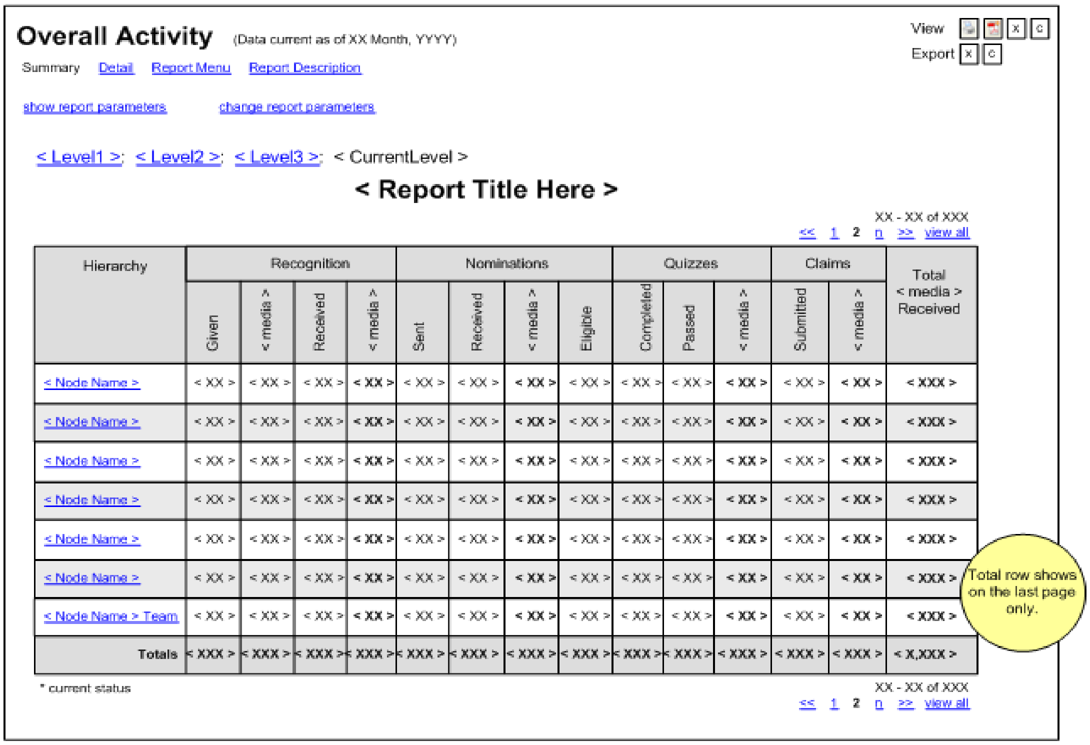


Quiz Analysis



Overall Activity

Overall Activity Summary



Overall Activity (Data current as of XX Month, YYYY)

Summary | Detail | Report Menu | Report Description

View | Export

show report parameters   change report parameters

< Level1 >: < Level2 >: < Level3 >: < CurrentLevel >

< Report Title Here >

XX - XX of XXX
<< 1 2 n >> view all

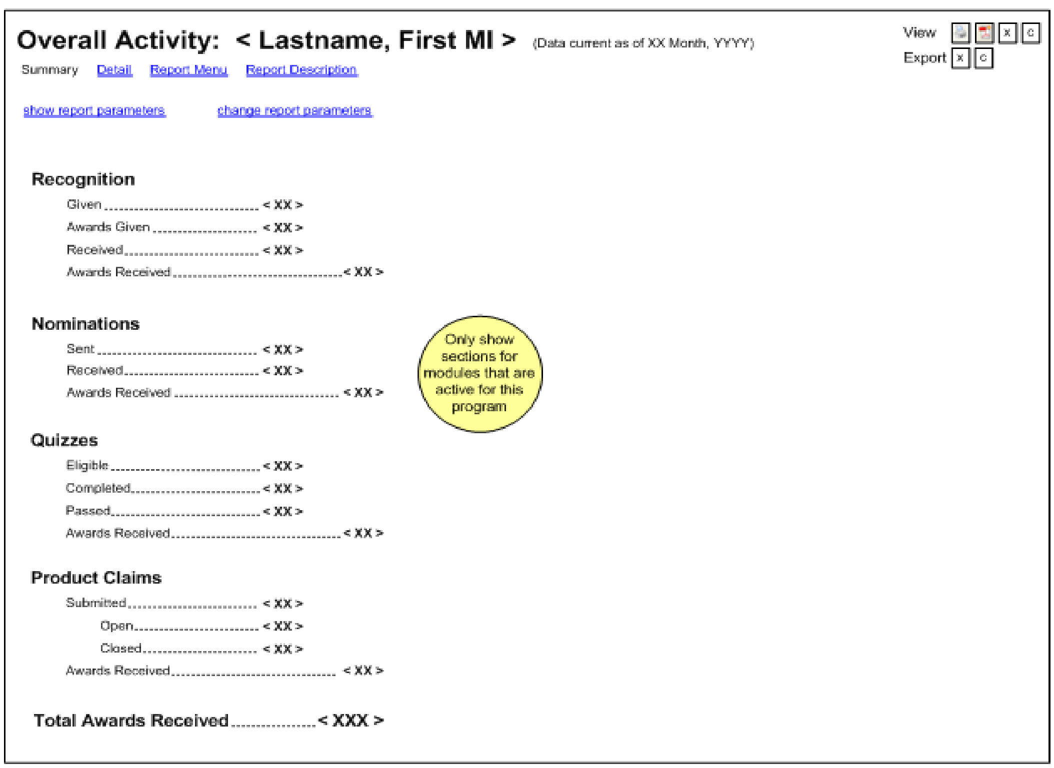
Hierarchy	Recognition				Nominations				Quizzes			Claims		Total < media > Received
	Given	< media >	Received	< media >	Sent	Received	< media >	Eligible	Completed	Passed	< media >	Submitted	< media >	
< Node Name >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XXX >
< Node Name >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XXX >
< Node Name >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XXX >
< Node Name >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XXX >
< Node Name >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XXX >
< Node Name >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XXX >
< Node Name > Team	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XX >	< XXX >
Totals	< XXX >	< XXX >	< XXX >	< XXX >	< XXX >	< XXX >	< XXX >	< XXX >	< XXX >	< XXX >	< XXX >	< XXX >	< XXX >	< X,XXX >

Total row shows on the last page only.

* current status

XX - XX of XXX
<< 1 2 n >> view all

Overall Activity Detail



Overall Activity: < Lastname, First MI > (Data current as of XX Month, YYYY)

Summary | Detail | Report Menu | Report Description

View | Export

show report parameters   change report parameters

Recognition

Given .... < XX >
Awards Given .... < XX >
Received .... < XX >
Awards Received .... < XX >

Nominations

Sent .... < XX >
Received .... < XX >
Awards Received .... < XX >

Only show sections for modules that are active for this program

Quizzes

Eligible .... < XX >
Completed .... < XX >
Passed .... < XX >
Awards Received .... < XX >

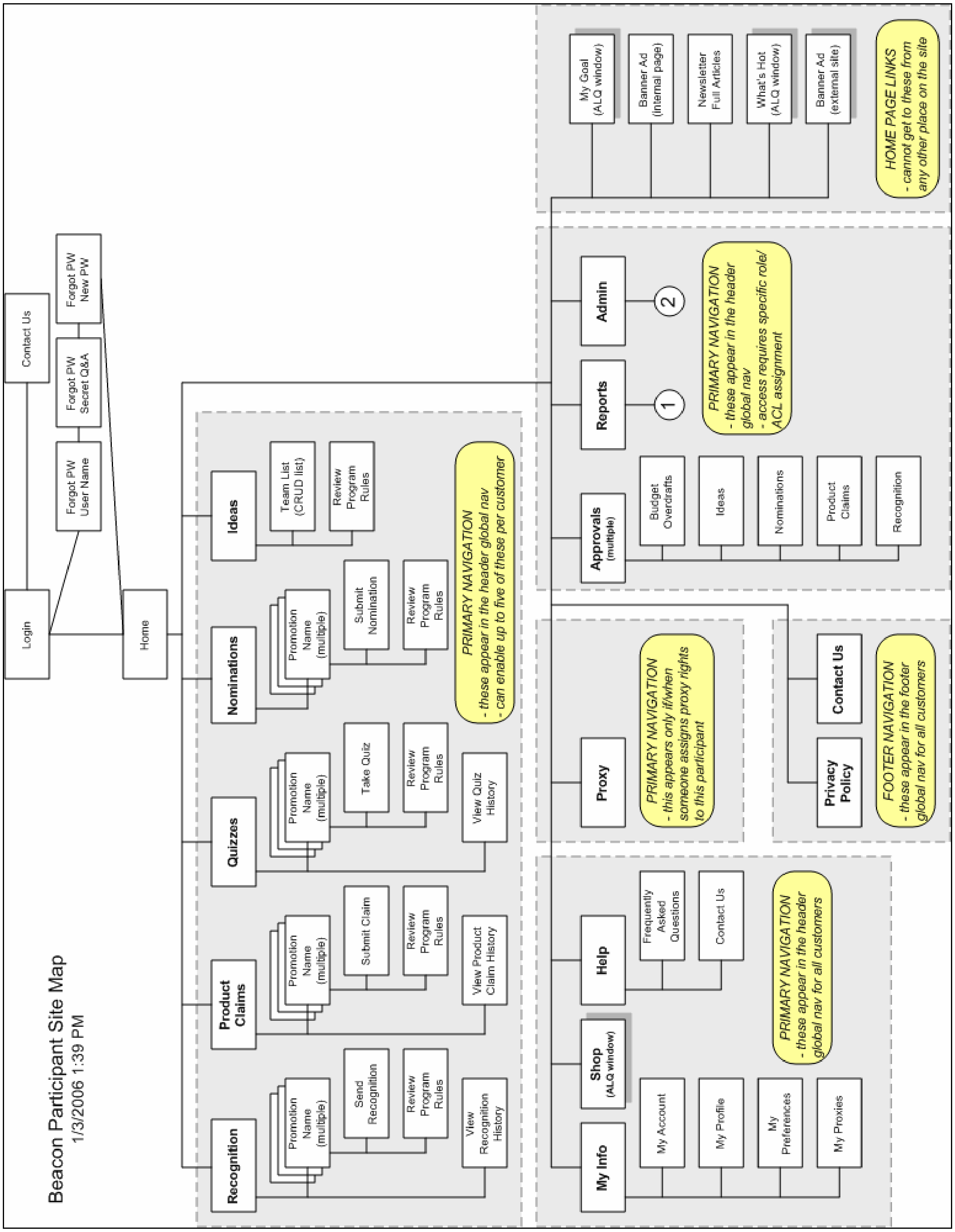
Product Claims

Submitted .... < XX >
Open .... < XX >
Closed .... < XX >
Awards Received .... < XX >

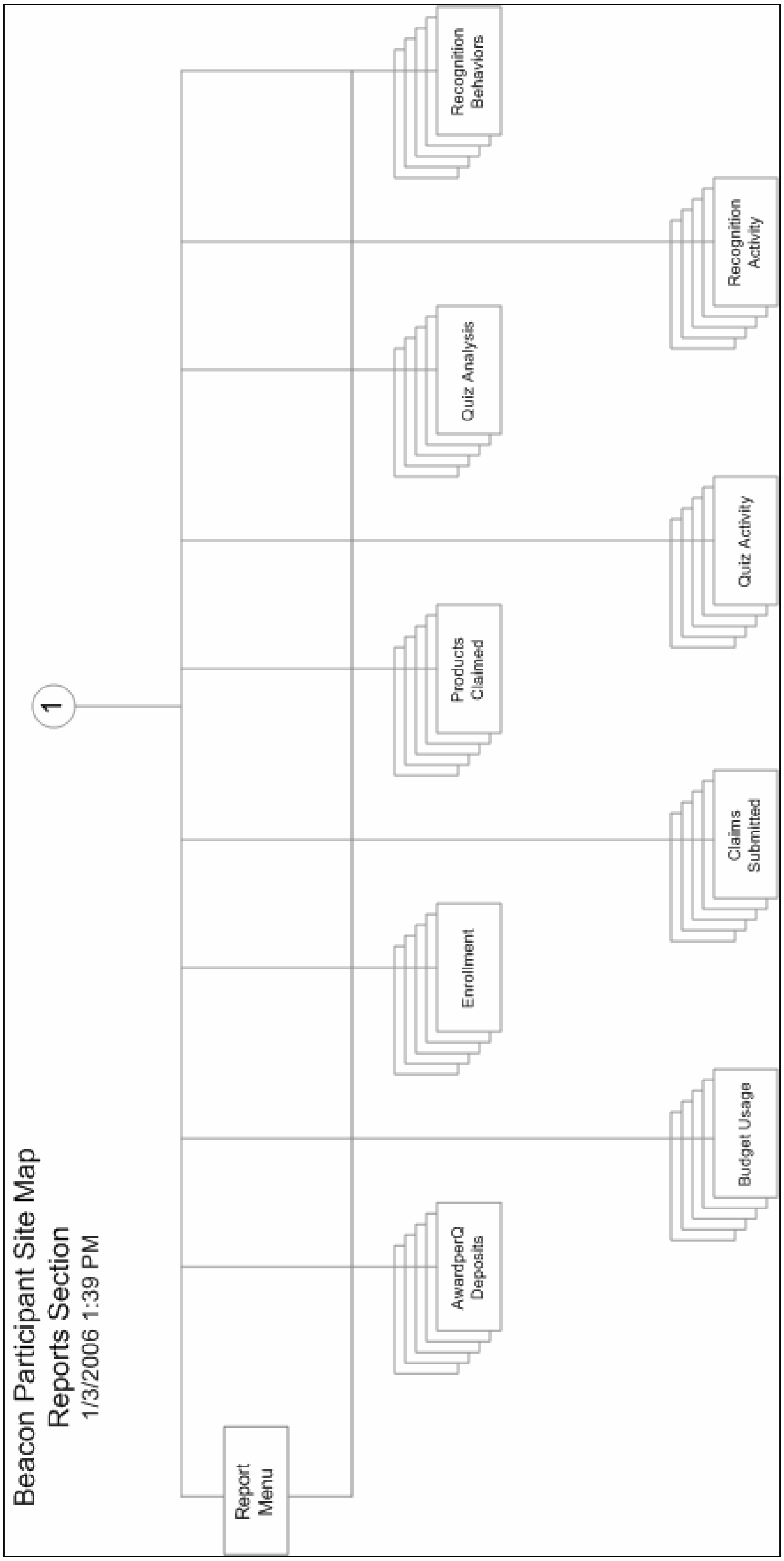
Total Awards Received .... < XXX >

Appendix D – Platform Site Map

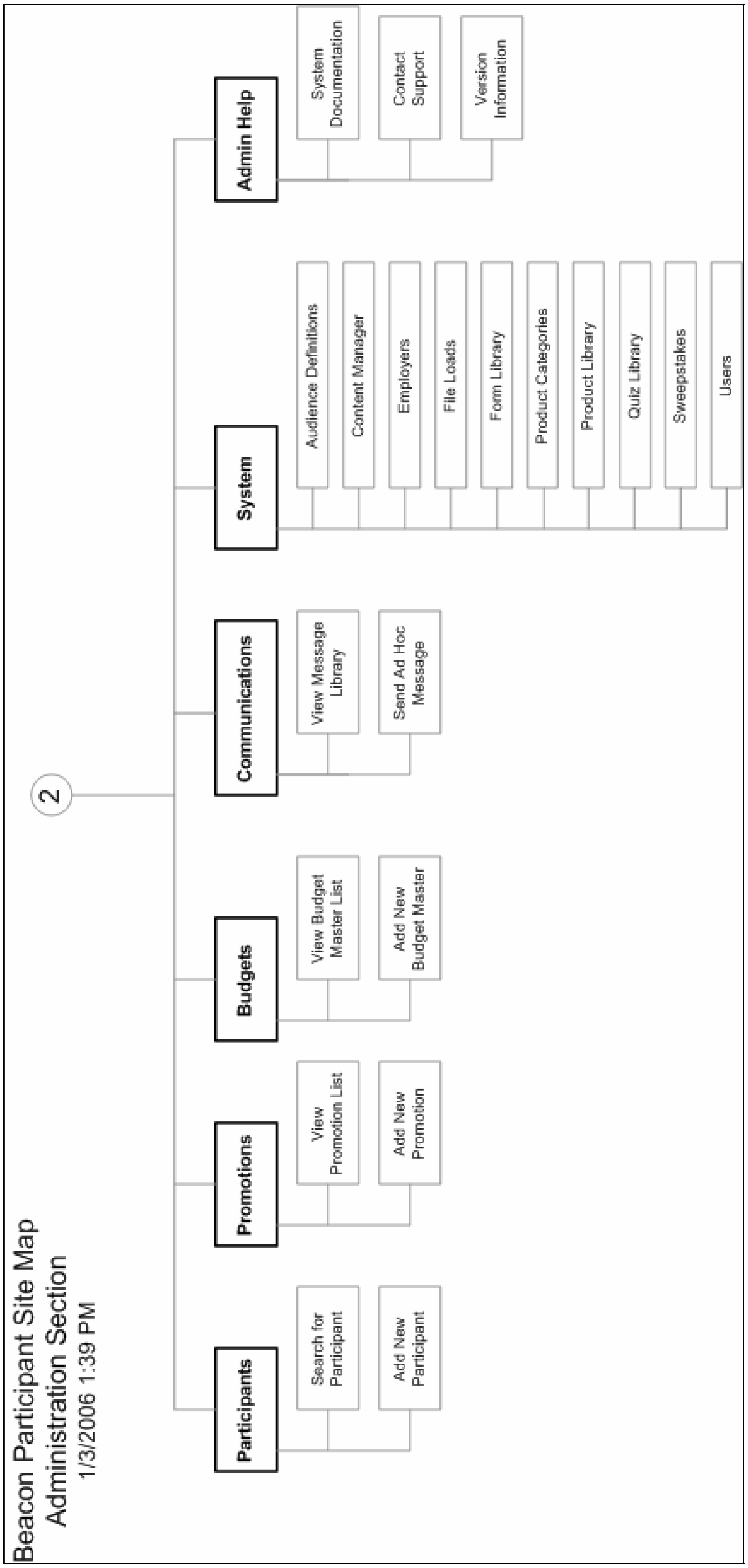
Participant Site Map



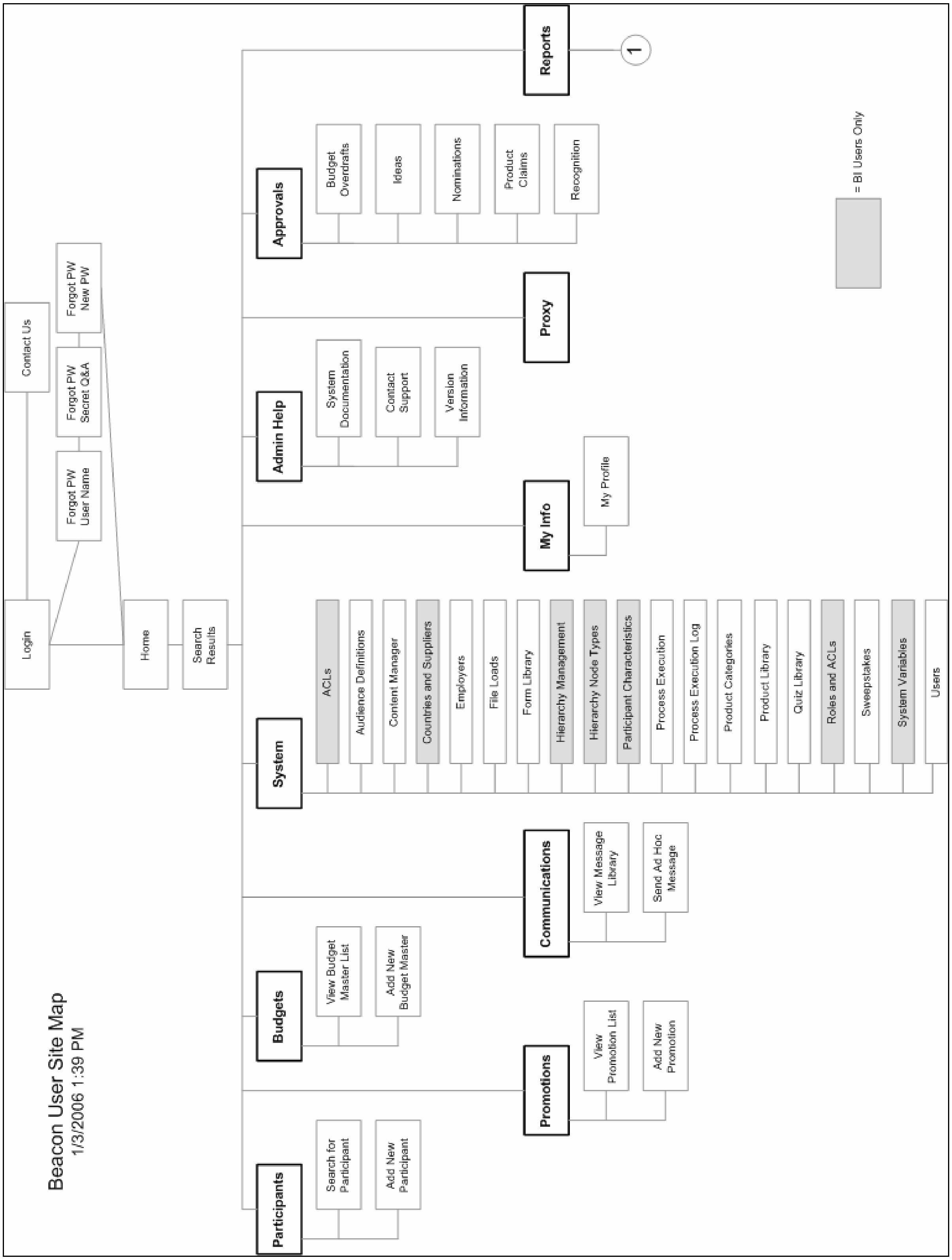
Reports Section



Administration Section



User Site Map



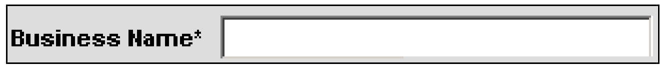
GLOSSARY

ACL	Acronym for **A**ccess **C**ontrol **L**ist. Enables a BI Administrator to control who can do what. For example, one Client Administrator may have rights to manage a company's southern region location or offices while another Client Administrator has responsibility for managing the Midwest region, but not the southern region.
Administrator	An Administrator has specific rights for administration of the client's site. Administrators may be a user, BI, Client, Site, or Report administrator. Administrators can also be a participant (PAX Administrator) in a promotion.
Approver	An approver is a special participant or user that has rights for approving various promotional award programs or claims.
AwardperQs	AwardperQs are points awarded to participants in recognition of outstanding contributions. AwardperQs are redeemable for brand-name merchandise items including electronics, sporting goods, home furnishings, toys, jewelry, and travel.
AwardBanQ	AwardBanQ is the official account for a participant. All transactions get deposited into the participant's AwardBanQ account and all redemptions come out of the AwardBanQ as well.
AwardsLinQ	AwardsLinQ is the single e-commerce system for BI. When participants go to redeem their rewards, they go through AwardsLinQ (which is integrated into the Platform). AwardsLinQ is set up once for all clients.
BII	BI International.
Bonfire	A QA environment for testing the Platform.
Boolean	Boolean logic is a form of algebra in which an expression results in a value of either TRUE or FALSE. For example, the expression 2 < 5 (2 is less than 5) is a Boolean expression because the result is TRUE. All expressions that contain *relational operators* such as the *less than* sign (<), are Boolean. The operators AND, OR, XOR, NOR, and NOT are Boolean operators. Examples of a field type used in the Platform may include data that requires a Yes/No, True/False, or On/Off selection.
Campaign	A unique number that identifies each project in the bank account system. Each country is assigned a campaign number. Participants are enrolled in campaigns based on their country association.
CIB	Acronym for **C**ustomer **I**nformation **B**lock.

Claims	An activity or "claim" recorded by a participant that identifies what was performed as part of a promotion, and results in qualification for various AwardperQs.
Claims Engine	The "claims engine" is the particular page flow for entering a claim.
Cluster	A group of disk sectors. A sector The operating system assigns a unique number to each cluster and then keeps track of files according to which clusters they use.
Content Management	The Content Management application, used by Client Administrators, maintains the content of the site in a database. Site content includes web site text such as Frequently Asked Questions (FAQs), Welcome story text and newsletters. Additional content developed for the site includes: program rules, email and system generated emails and error message text.
CSV	Short for ***c**omma-**s**eparated **v**alues*, another name for the comma-delimited format of data representation, which you can import into an Excel spreadsheet.
CVS	Short for ***C**oncurrent **V**ersions **S**ystem*, an open-source, network-transparent program that allows developers to keep track of different versions of source code. CVS does not maintain multiple versions of source code files but keeps a single copy and records of all of the changes that are made. When a developer wants a particular development version of a file, CVS will reconstruct that version based on its records. Bugs can often get into code when it is modified and may not be detected until long after the modification is made. CVS can retrieve old versions of the code, allowing the developer to see precisely which change caused the bug. CVS is also useful when more than one person is working on a specific file, where it is possible for the developers to overwrite each other's changes. CVS solves this problem by having each developer work in an individual directory and then merging the work from each after the work is complete. CVS is not a build system but rather a way to control disparate versions of code as it is developed over time. CVS is also called a *version control system*.
DDLB	Acronym for **d**rop-**d**own **l**ist **b**ox.
eCard	Online/electronic greetings and thank you cards sent via email for special occasions and recognition programs. eCards are designed with special themes, illustrations, and text.

Element

An item or field and its label that appears on a web page or form. Different types of elements include: Boolean, Date, Integer, Number, Multi-select, Single Select, Copy block, or Text. For example, the following label and field are elements of a form:



Emails

System generated and adhoc emails are used for communicating promotion information, recognition, awards, etc., and can be sent to participants or groups of participants.

Employee Referral

A promotion type that rewards employees for referring personnel for potential employment.

FAQs

An acronym for **F**requently **A**sked **Q**uestions.

Form Element

A label or field that appears on a form and identifies what information to enter or select from.

Giver

In a Recognition promotion program, the giver is the participant that gives performance recognition to another participant.

Hierarchy

The Platform includes the capability to have multiple hierarchies (tree-like structures) that identifies how an organization is organized. An organizational hierarchy is one example but not necessarily the only one.

ISO

International Standardization Organization (ISO).

Ideas

A promotion type that rewards participants for submitting ideas that result in significant improvements in the business, services offered, or products.

Informatica

Informatica is a provider of data integration software that provides access, integration, and consolidation of enterprise data via the Platform interface.

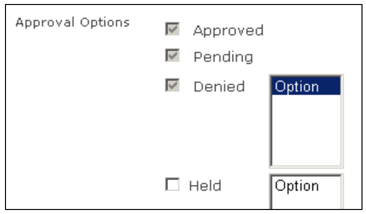
Integer

Any whole number.. The following are integers: 0, 1 -125.

List Builder

List builder is a means of selecting a participant(s) who is a member of an activity or who can view content. List builder is shown on different program pages, such as selecting (listing) a specific audience for a promotion.

Multi-Select	A pick list of options that appears next to a series of option buttons or check boxes. A user/participant can select one or more items from the list.



Newsletter	Newsletter links appear on the home page. Newsletters promote initiatives, share best practices, recognize top performers, plus any other information you want communicated to employees.
Nominations	Enables designated participants to nominate individuals for a specific award.
Opinio	Opinio™ is survey software that enables users to produce and publish surveys using a regular web browser. It allows users to create surveys, polls, RFIs, job application forms, etc. Reports are immediately available after respondents have started answering the survey, and can be displayed directly in the web browser, or exported to other statistical applications for further analysis.
OddCast card	An animated, talking e-card (utilizing Oddcast technology), sent to participants to congratulate them on awarded points or in recognition of outstanding contributions.
Participant	A participant takes part in the promotion. Participants may be an employee, an approver, or a special participant with administrative rights.
PAX	An abbreviation sometimes used for participant.
PAX Administrator	A participant with administrative rights to the program.
Pick List	Pick lists are system/user defined lists for looking up data, and are used mostly in a drop-down list box. Lists of items that appear in a drop-down list box (DDLB) were created with a pick list.
Product	Products are either qualification related or payout related items, such as electronics, furniture, certificates, accessories, consumables, etc.
Program Rules	Promotion rules made up by users
Process Team	The BI team of subject matter experts that provides product support to clients of BI.
QuickLinks	Links to frequently used pages that appear on the Platform home page. A QuickLinks button is found at the top of a page for most Platform functions. Clicking the QuickLinks button places that function and a link to it on the home page. Up to five QuickLinks are allowed.

Quizzes
Quizzes test participants' knowledge about specific topics and can be established for specific audiences. Typically, AwardperQ deposits or certificates are associated with a passing score.

Receiver
In a Recognition promotion program, the receiver is the participant that receives some type of performance recognition.

Recognition
A Recognition program highlights and rewards employees for their excellence in all areas and job functions across a company. Recognition can be given through certificates, AwardperQs, and sweepstakes entries.

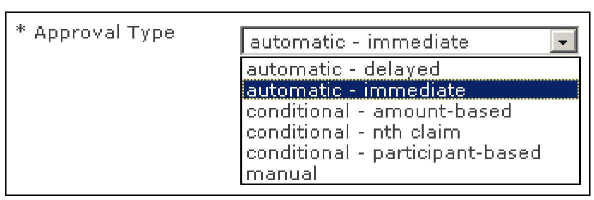
Referrals
Enables participants to refer potential employees for hire. AwardperQ deposits are made at the Hire and Anniversary events.

Regex
Regex is short for regular expression. A regex is a string of text that enables a user to create pattern matching, in this case, for passwords.

Sector
The smallest unit that can be accessed on a disk. When a disk undergoes a low-level format, it is divided into tracks and sectors. The tracks are concentric circles around the disk and the sectors are segments within each circle. For example, a formatted disk might have 40 tracks, with each track divided into 10 sectors. The operating system and disk drive keep tabs on where information is stored on the disk by noting its track and sector number.

Segmentation
Audience Definitions (often referred to as segmentation) is a means of creating a group or list of participants who are eligible to perform an activity or view content.

Single Select
A pick list of options that appears in a drop-down list. A user/participant can select only of the items from the list.



Six Sigma
A measurement based strategy program that focuses on process improvement and variation reduction within a business.

SME
Subject Matter Expert.

SSN/SIN
Social Security Number/Social Insurance Number (Canada)

SuD
An acronym for System under Development.

Sweepstakes
Contests in which product claims or AwardperQs may be awarded to the winner.

System Variables	Variables set up during the system definition phase that are used to customize an application. System variables are pre-defined attributes that control what features and elements of the Platform are available and functional.
Talking Cards	Online/electronic cards that also have recorded messages sent via email for special occasions and recognition programs. Talking cards are also designed with special themes, illustrations, and text.
Unity Mail	An email software package deployed within the Platform.
URL	Acronym for Universal Resource Locator, the global address of documents and resources on the World Wide Web.
User	A user is a BI administrator or a client administrator who is not eligible to receive awards in a project. A user has a unique navigation (unique navigation tabs) as compared to a participant and a PAX administrator. What functions an administrator has access to, is controlled by ACLs and Roles. A user may be an approver, site administrator, BI Administrator, BI Project Manager, or client administrator.
Web Side Story	A web tracking program.
Welcome Story	The opening text displayed on the home page whenever a Participant accesses the promotion site.

INDEX

Q

R

S

T

U

V

W

The Business Improvement Company

7700 Bush Lake Road
Minneapolis, MN 55439-2810
952-835-4800
http://www.biworldwide.com