Manulife Data Services, Inc. (Philippines)
Manulife Building
UP Ayala land Techno Hub
Commonwealth Ave., Quezon City 1104

MBPS REPORTING

Operations Performance Tracker User Manual

DIGITAL INFORMATION SERVICES

Summary of Changes

Version Date	Version Number	Change Request Number	Nature of Change	Editing Author
6/1/2013	1.0		Creation of Document	Igee Cuadra
9/1/2014	2.0		Training manual format	Igee Cuadra

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1. System Overview

THE MBPS Operations Performance Tracker or OPT is a web based system developed using Microsoft C# by the MBPS Web Development Team. It is used by the MBPS staff to record performance metrics and allows MBPS Leaders to monitor/add/edit/change entries as required by their business process.

2. Access Types

2.1 **Leader Access.** This type of access is granted to leaders. This access allows leaders to manage worktypes, NPT, metrics, attendance, shift and all added functions of the tool,

2.2 **Associate Access.** This type of access id granted to associates. This is limited to entry of time logs in NPT Metric and Worktype Metric.

3. User Manual

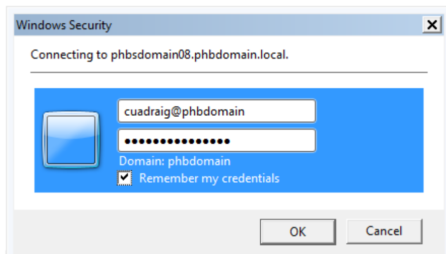
A. LOGIN. The system automatically detects the access when user successfully logged in to the system.

a. Open your local Internet explorer.

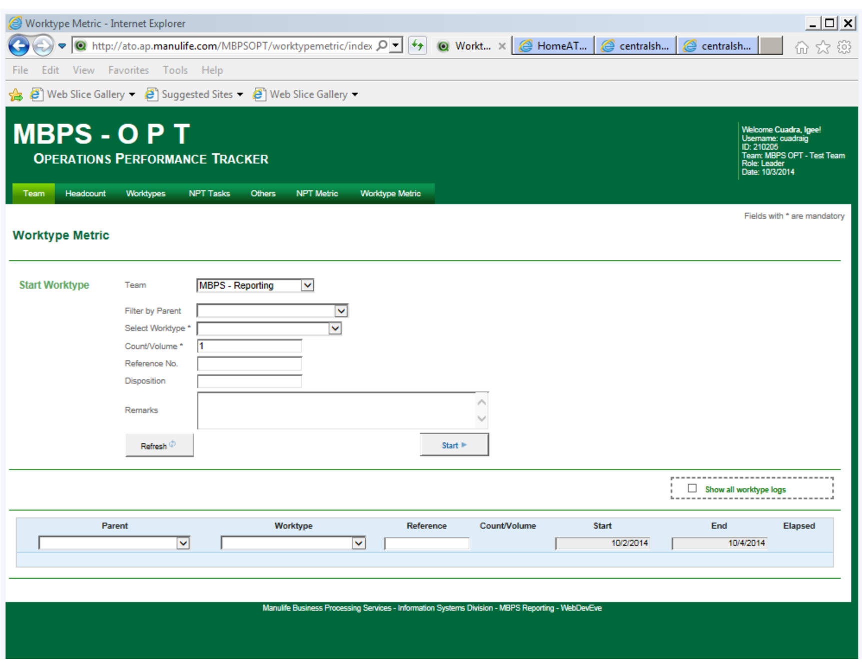
b. Copy link to the address bar. ***http://ato.ap.manulife.com/mbpsopt***

c. Enter credentials and key in username and password.

Example:



- Once login as successful you will be redirected to the MBPS OPT site.



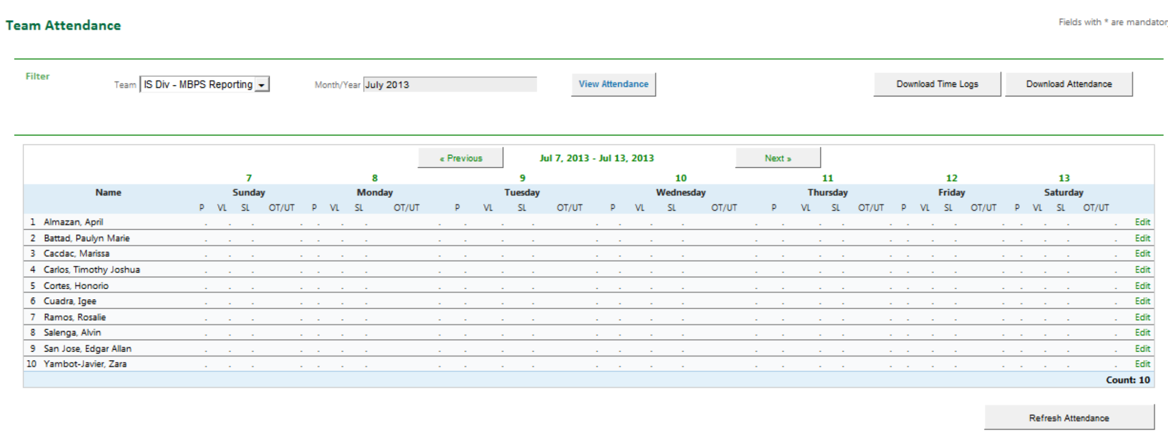
- Error page will be displayed for invalid login. If this happens check your credentials or file a ticket through ***http://ato.ap.manulife.com/mbpsrear***

B. Team Attendance. You can update the attendance of associates for the current and previous month

DISPLAY ATTENDANCE

1. Click on Team -> Attendance
2. Select team and date.
    a. Click "View Attendance" button to display attendance in the list based on the selected filter.
    b. Click "Download Attendance" button and attendance will be exported to excel based on the selected filter
    c. Click "Download Time Logs" button and time logs will be exported based on the selected filter.
3. The list is displayed per week and day and is divided into four columns.
    i. P or Present. Valid values are 1 (whole day), 0.5 (Half Day) and 0.
    ii. VL or Vacation Leave. Valid values are 1 (whole day), 0.5 (Half Day) and 0.
    iii. SL or Sick Leave Valid values are 1 (whole day), 0.5 (Half Day) and 0.
    iv. OT: Overtime or UT: Under time is expressed in negative. Example: -30 or 30minutes under time

    b. Click "Previous" button to display prior week attendance or "Next" button to display the following week attendance.
4. Click on the "Refresh Attendance" button when an associate is not available on the list
.



EDIT ATTENDANCE

1. Click "Edit" button to update an employee's attendance.
    a. Edit form will display. Attendance of selected employee for the selected month will be displayed.
    b. Un-tick checkbox ☑ if you don't wish to edit the attendance for the indicated date. By default all is checked.
    c. Enter valid values.
        i. P, VL, and SL: Valid values are 0 for absent, 0.5 for half day and 1for present.
        ii. OT: Accepts values expressed in minutes. Ex: 30 for 30 minutes
        iii. UT: Accepts values expressed in negative (-) minutes. Ex: -30 for 30 min
    d. Click "Page Up" Link to scroll to top
    e. Click "Save" button to save the changes you've made.
    f. Check the list to see your updates.

Name : Juan Dela Cruz
Month: June 2013

No.	☑	Date	Present	Vacation Leave	Sick Leave	O.T/U.T
1	☑	6/1/2013	0	0	0	0
2	☑	6/2/2013	0	0	0	0
3	☑	6/3/2013	1	0	0	0
4	☑	6/4/2013	1	0	0	0
5	☑	6/5/2013	0	0	0	0
6	☑	6/6/2013	0	0	0	0
7	☑	6/7/2013	0	0	0	0
8	☑	6/8/2013	0	0	0	0
9	☑	6/9/2013	0	0	0	0
10	☑	6/10/2013	0	0	0	0
11	☑	6/11/2013	0	0	0	0
12	☑	6/12/2013	0	0	0	0
13	☑	6/13/2013	0	0	0	0
14	☑	6/14/2013	0	0	0	0
15	☑	6/15/2013	0	0	0	0
16	☑	6/16/2013	0	0	0	0
17	☑	6/17/2013	0	0	0	0
18	☑	6/18/2013	0	0	0	0
19	☑	6/19/2013	0	0	0	0
20	☑	6/20/2013	0	0	0	0
21	☑	6/21/2013	0	0	0	0
22	☑	6/22/2013	0	0	0	0
23	☑	6/23/2013	0	0	0	0
24	☑	6/24/2013	0	0	0	0
25	☑	6/25/2013	0	0	0	0
26	☑	6/26/2013	0	0	0	0
27	☑	6/27/2013	0	0	0	0
28	☑	6/28/2013	0	0	0	0
29	☑	6/29/2013	0	0	0	0
30	☑	6/30/2013	0	0	0	0

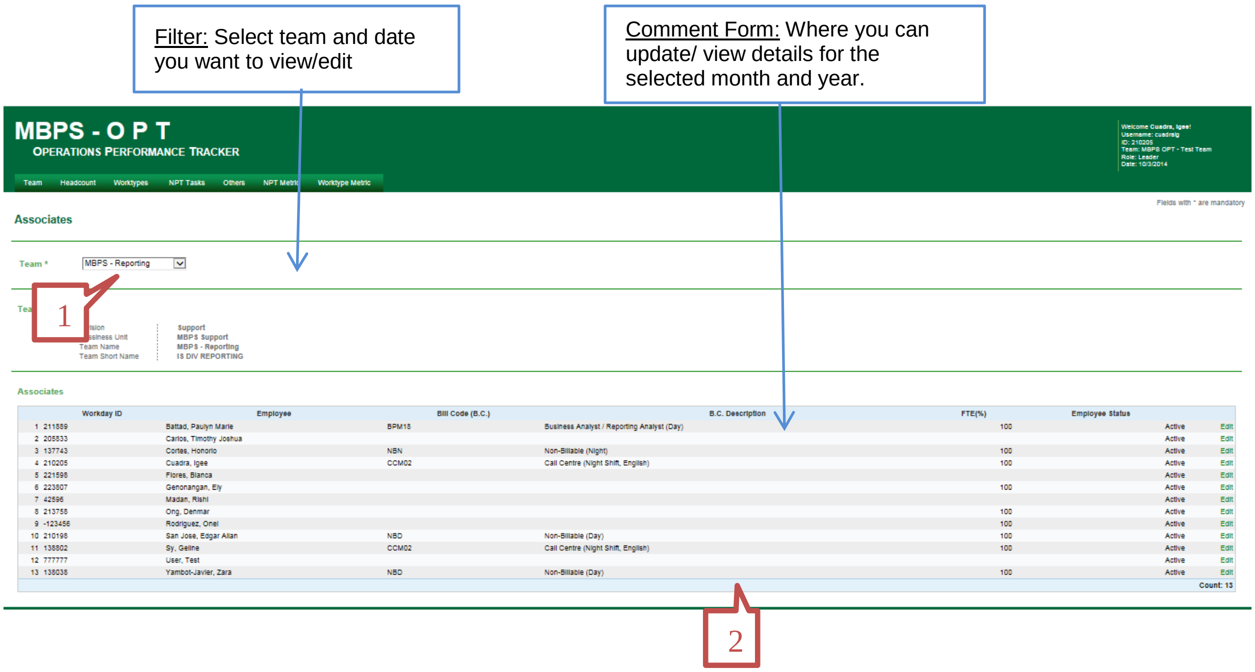
Save

Page Up

Valid Values
* Present / Vacation Leave(VL) / Sick Leave(SL): 0, 0.5 or 1
* For Overtime (O.T): Values expressed in minutes: e.g. 75
* For Undertime(U.T): Values expressed in minutes: e.g. -30

C. Associates. This window displays list of associates in the team

- On the Team Tab click on the Associates sub menu

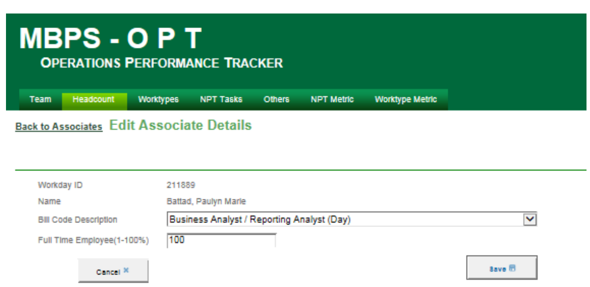


Viewing Accuracy Details

1. Select Team from Filter
2. The Associate List Form will be displayed for the selected filter showing associates for the selected team

Edit Associate

3. Click on the "Edit" link.



4. Enter Bill Code Description and Full Time Employee (FTE) percentage.
5. Click "Save" button to commit or "Cancel" button to ignore changes.

D. Shift. This window allows you to update shift of associates in a weekly period. You can update the shift of associates for the current and previous month.

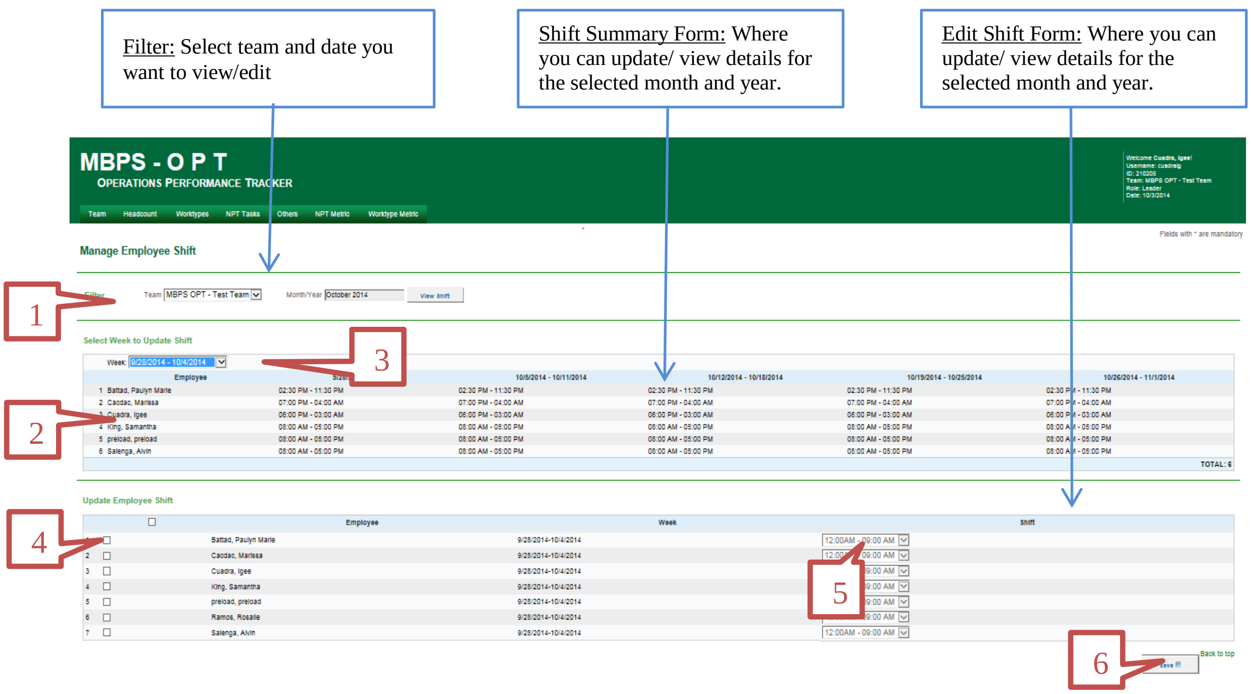
- On the Team menu click on the Shift sub menu.

<u>DISPLAY SHIFT SUMMARY</u>

1. Select team and date.
    a. Click “View Shift” button to display attendance in the list based on the selected filter.
2. The list will display shift of associates per week for the selected month.

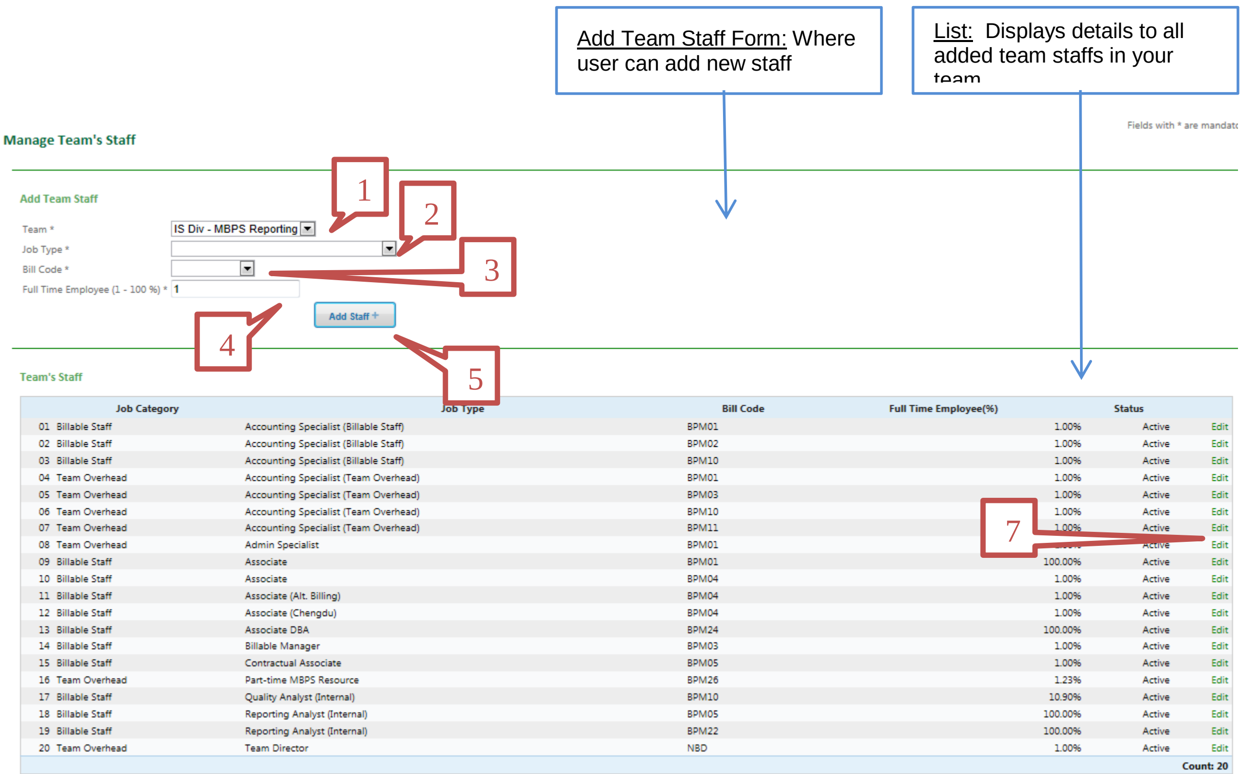
<u>EDIT SHIFT</u>

3. Select the week from the dropdown menu.
4. Tick on the checkbox of the row to edit.
5. Select the shift from the dropdown.
6. Click “Save” to update shift.



E. Team Staff. This window will enable leaders to add and modify team staff for the team. This staffs will be given corresponding headcount forecast numbers in the headcount forecast module.

- On the Headcount Menu, click on the “Team Staff” sub menu.

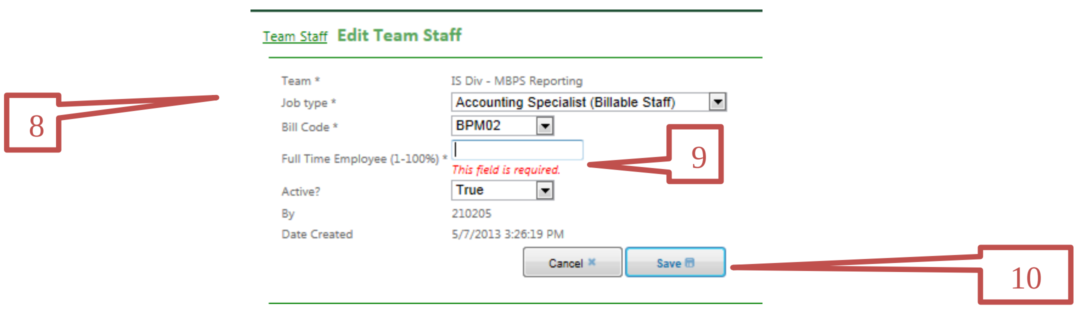


Adding Team Staff

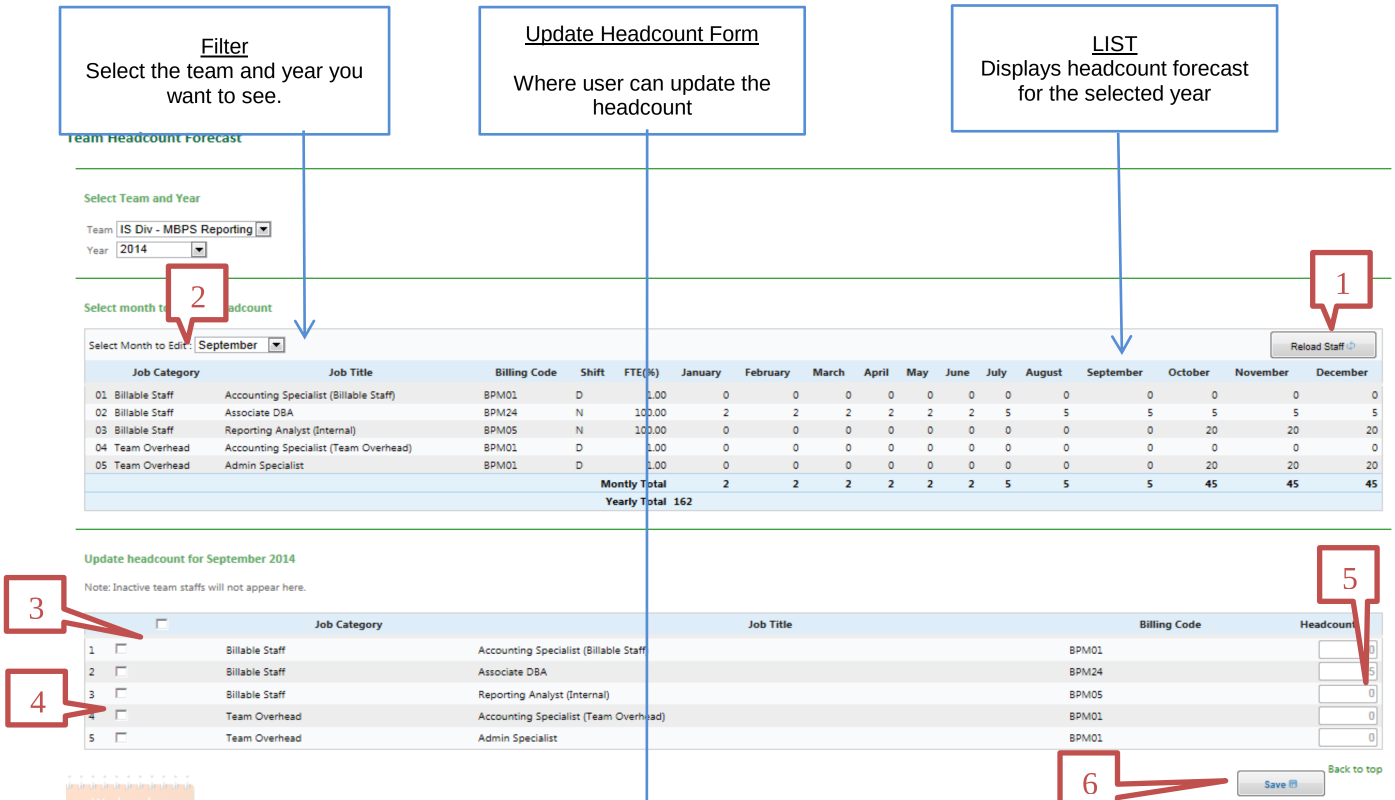
1. Select Team
2. Select Job type
3. Select Bill code
4. Enter FTE value
5. Click “Add Staff” button to save.
6. An error message will display if you missed the required fields marked with “ * ”

EDIT Team Staff

7. On the right side of the row you want to update, click Edit.
8. You'll be redirected to the **Edit Team Staff** window. (see screenshot below)
9. Update the fields. NOTE: If you set **Active to FALSE**, It will be disregarded in the headcount forecast. Error message will appear for invalid values entered.
10. Click "Save" button to save or "Cancel" button to ignore changes.



F. Headcount Forecast. This module allows leaders to input headcount forecast numbers in for each added team staff.



Create Headcount Template

1. If you already added team staff, click "Reload Staff" button to create template for the selected year.
   NOTE: You can also use Reload Staff if ever you created the template before you added a new team staff.

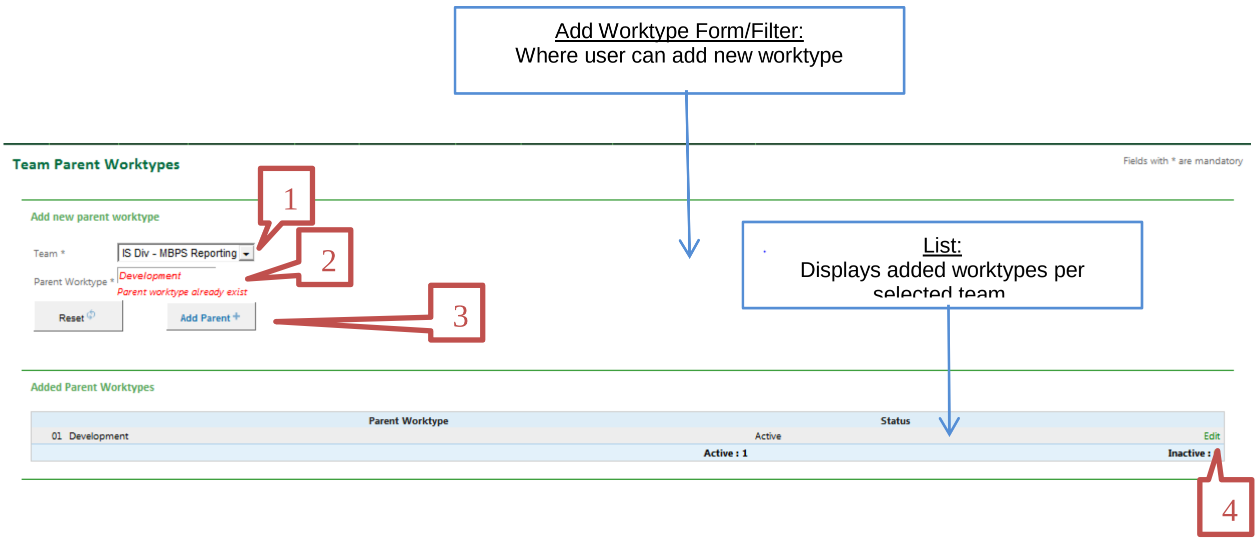
Update Headcount

2. Select the month you want to edit. The Update headcount form will show.
   NOTE: You can only update prior month onwards.
3. Tick on the checkbox to edit ALL rows
4. Tick on the checkbox 1 to enable editing of a particular row only
5. Enter values for headcount
6. Click "Save" button to save all modifications
   NOTE: Once saved, headcount updates the preceding months

   Example: You selected September and updated no.2 Team staff to 5, in the display, September, October, November and December headcount will be 5.

G. Parent Worktype. This module allows leaders to manage the parent worktypes of the team.

- On the Worktypes Menu click on the “Parent Worktype” submenu.



Add New Parent Worktype

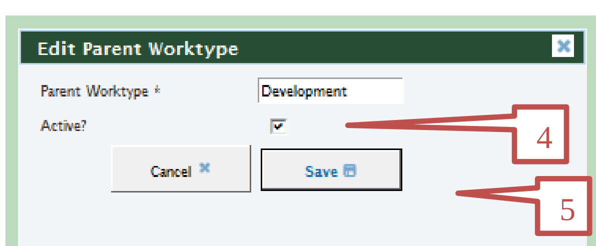
1. Select Team
2. Enter parent work type name. Error message will display for duplicate entries.
3. Click “Add Parent” button to save the changes or reset to refresh page.

Edit Worktype

4. On the right side of the row you want to update, click “Edit” link. A dialog box will appear.
5. Update the fields.

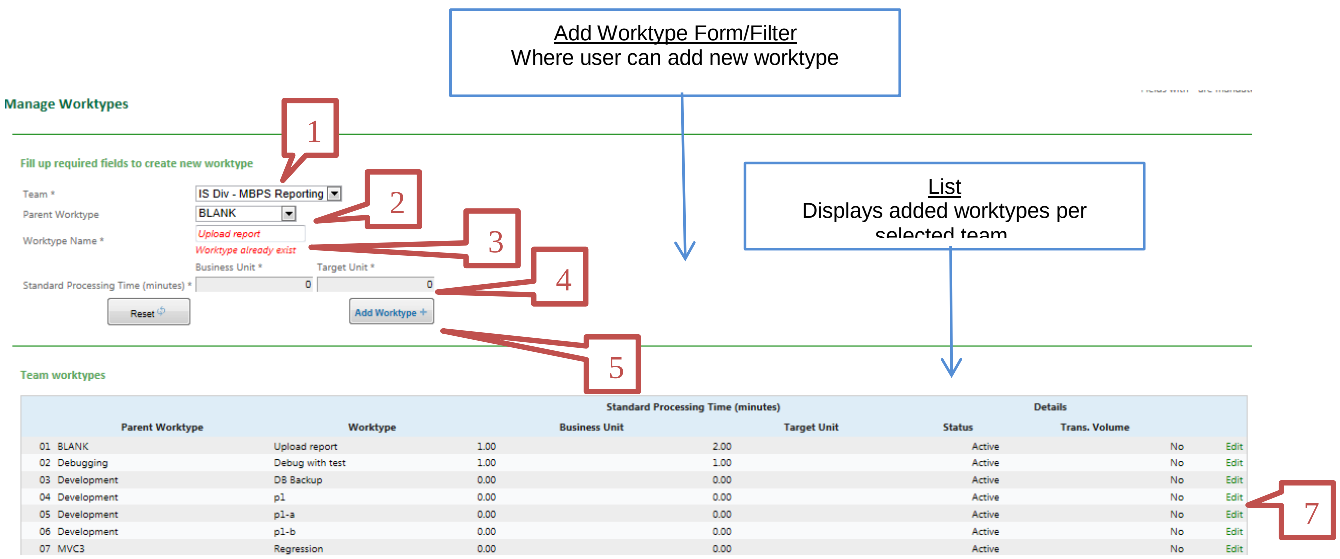
    NOTE: If field **Active** is set to false**.** It will be hidden in the selection of parent work types in the “*manage worktype module”*.

6. Click “Save” button to save changes or “Cancel” button to ignore changes.



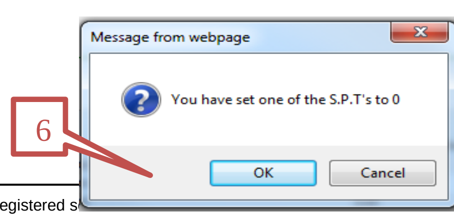
H. Worktype. This module allows leaders to manage their team's worktypes.

- On the Worktypes menu, click on the "Worktype" sub menu.



Add New Worktype

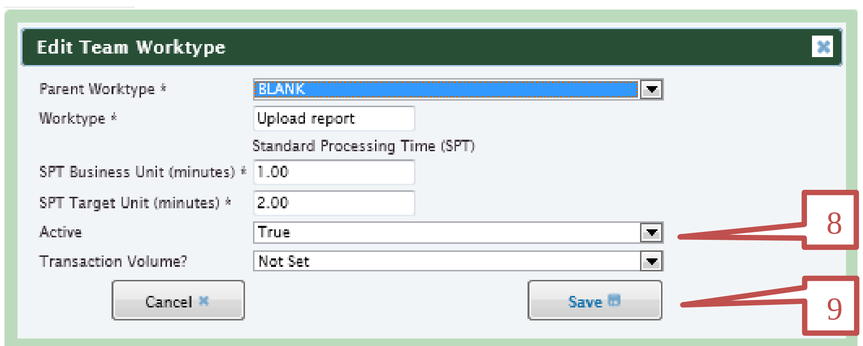
1. Select Team
2. Select parent worktype.
   NOTE: Inactive parent worktypes will not be displayed in the selection.
3. Enter work type name. Error message will display for duplicate entries.
   a. Example:
      Not duplicate: Parent1 - worktype1
      Parent2 - worktype1
      Duplicate: Parent2 - worktype2
      Parent2 - worktype2
4. Specify value for standard processing time for Business unit and target unit.
5. Click "Add Worktype" button to save the changes or reset to refresh page.
6. Confirmation box will appear if you have set any one of the SPT to 0. (See below screenshot)
   a. Click OK button to continue saving
   b. Click Cancel if you don't want to proceed.



Edit Worktype

7. On the right side of the row you want to update, click “Edit” link. A dialog box will appear.
8. Update the fields.

   NOTE: If set field **Active** to false**.** It will be hidden in the selection of worktypes in the *worktype metric module*.
9. Click “Save” button to save changes or “Cancel” button to ignore changes.



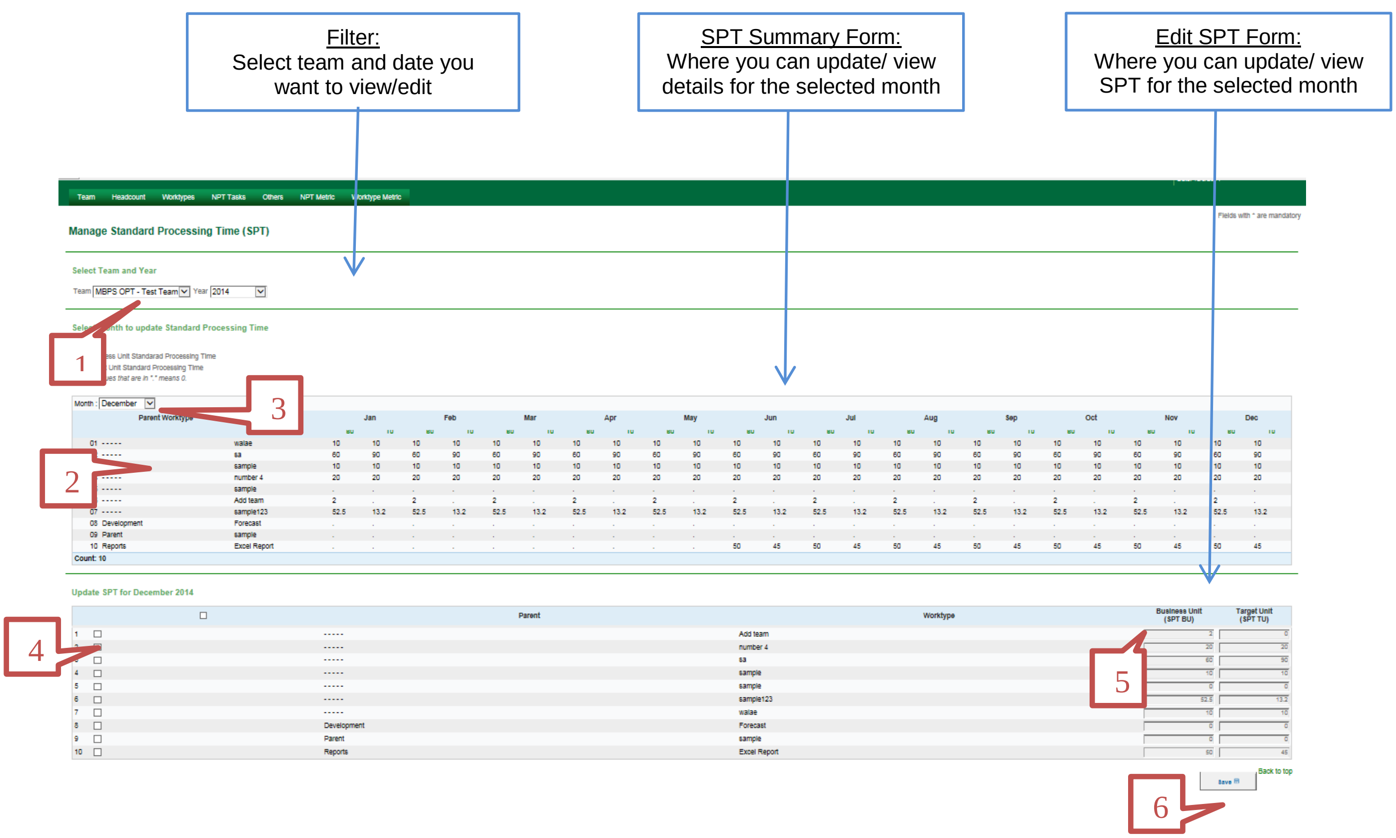
I. Standard Processing Time (SPT). This module allows leader to manage the SPT's of the worktypes in a monthly basis. You can update the Standard Processing Time (SPT) of the worktypes for the current and previous month. On the Worktype menu click on the SPT sub menu.

<u>DISPLAY SPT SUMMARY</u>

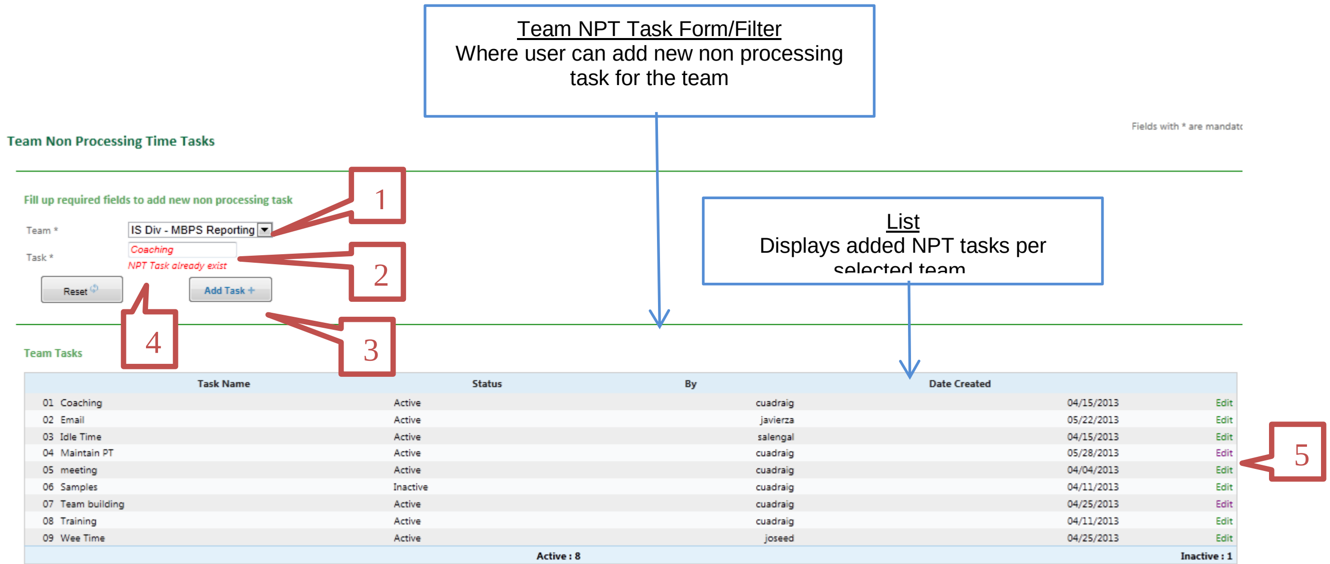
1. Select team and date.
    a. Click "View Shift" button to display attendance in the list based on the selected filter.
2. The list will display a summary of SPT's of each worktype per selected filter

<u>EDIT SPT</u>

3. Select the Month from the dropdown menu.
4. Tick on the checkbox of the row to edit.
5. Enter SPT Business Unit and Target Unit in minutes.
6. Click "Save" to update SPT. This will reflect from the month selected onwards.



J. Non Processing Task. This module allows leaders to manage the non-processing tasks of the team.

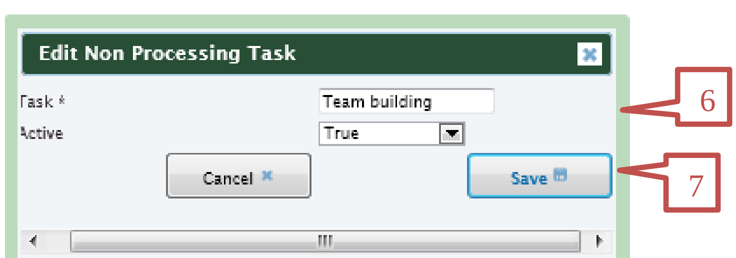


Add New NPT Task

1. Select Team
2. Enter non processing task
3. Click “Add Task” button to save or Reset to refresh
4. An error message will display for duplicate name

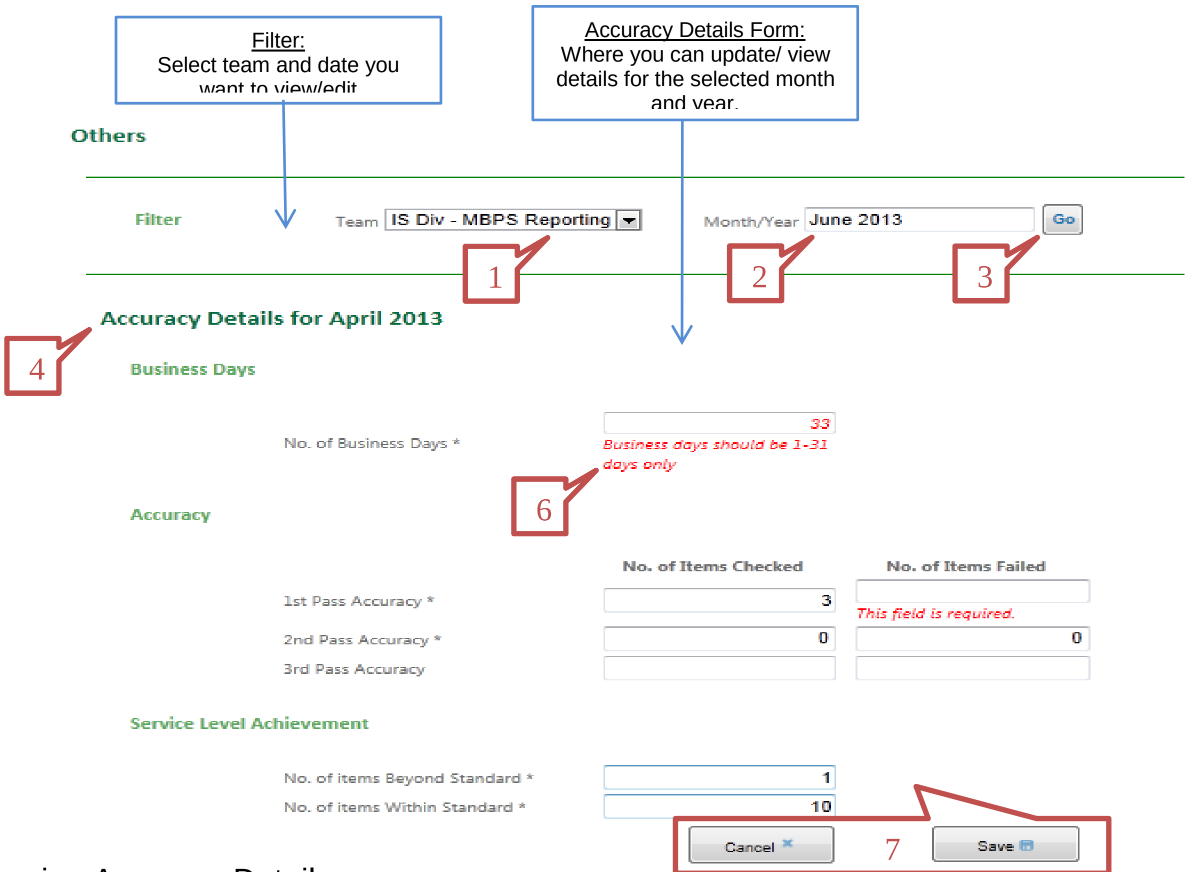
Edit Task

5. On the right side of the row you want to update, click “Edit” link. A dialog box will appear.
6. Update the fields.
   NOTE: If you set **Active** to false**.** It will be hidden in the selection for NPT tasks in Non-Process metric Module.
7. Click “Save” button to save changes or “Cancel” button to cancel.



K. Quality. This module allows leaders to input their monthly accuracy score and business days in a monthly basis.

- On the Others menu click on the Quality submenu.



Viewing Accuracy Details

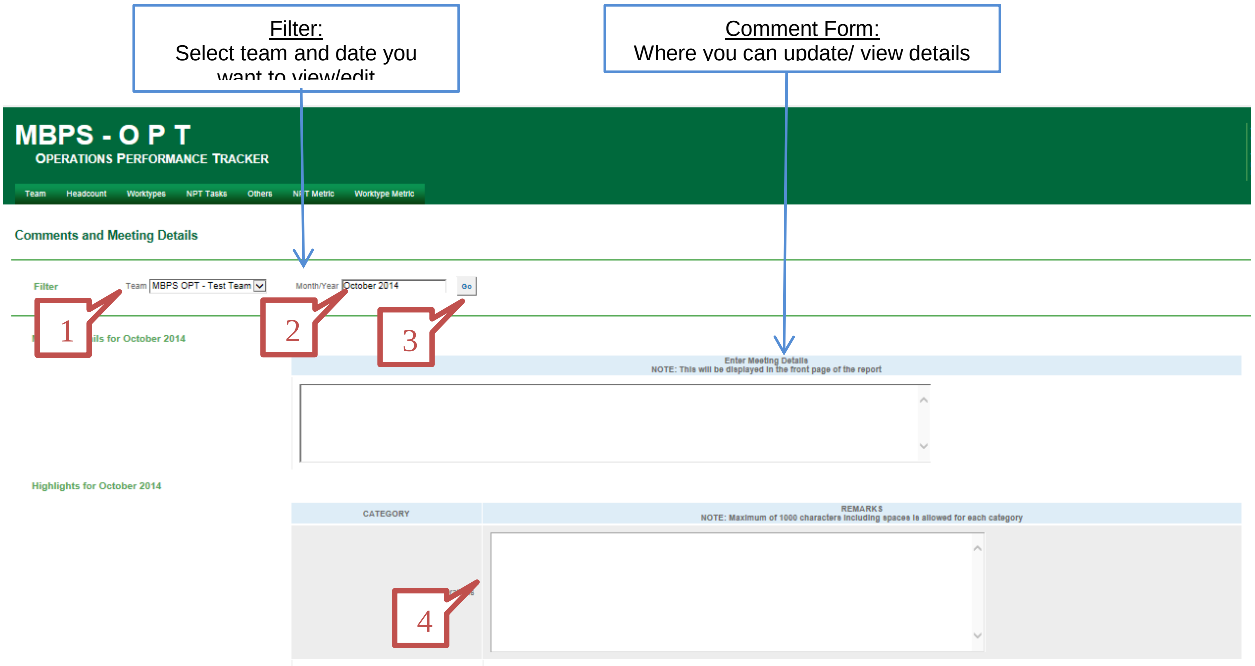
1. Select Team from Filter
2. Select Month and Year from Filter
3. Click "Go" button to proceed
4. The Accuracy Details Form will be displayed for the selected filter showing entries made for the specified filter.
   NOTE: If all the entries are blank it means that there were no entries for accuracy for that date.

Edit Accuracy Details

5. Repeat step 1-4. Update the fields with valid values.
6. Error message will be displayed for invalid entries
7. Click "Save" button to commit or "Cancel" button to ignore changes.

L. Comments. This module allows leaders to input their comments that will be available on the generated reports.

- On the Others menu click on the Comment submenu.



Viewing Accuracy Details

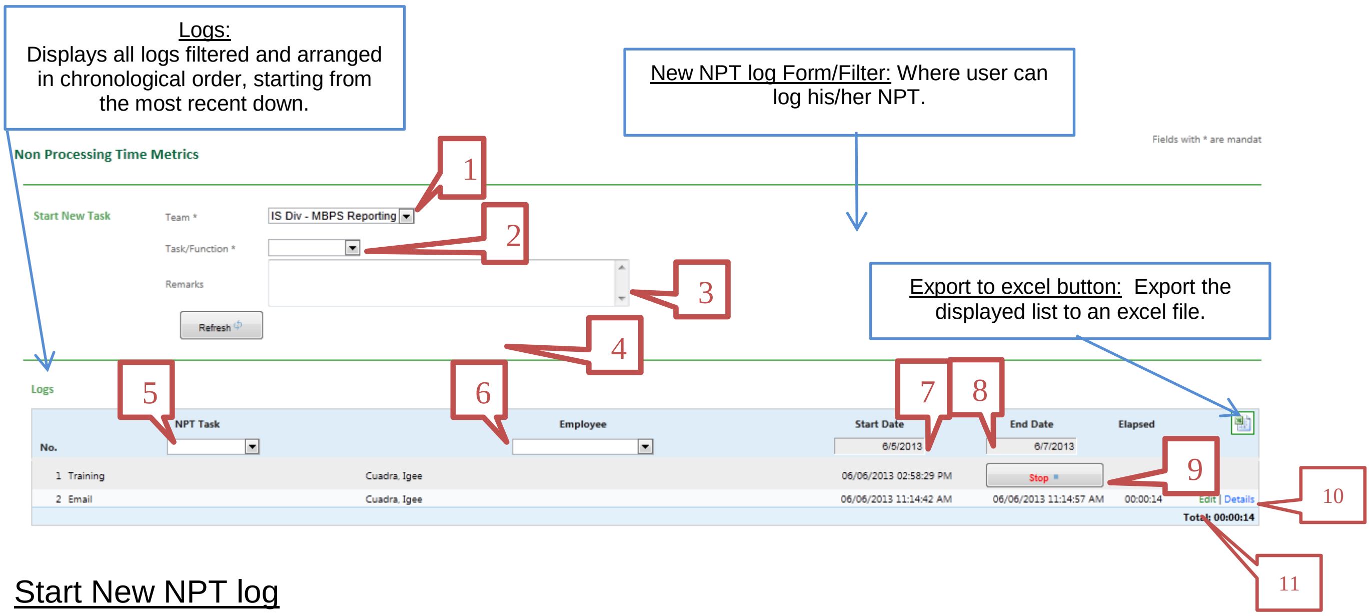
1. Select Team from Filter
2. Select Month and Year from Filter
3. Click “Go” button to proceed
4. The Comment Form will be displayed for the selected filter showing entries made for the specified filter.

   NOTE: If all the entries are blank it means that there were no entries for accuracy for that date.

Edit Comments

5. Repeat step 1-4. Update the fields with valid values.
6. Click “Save” button to commit or “Cancel” button to ignore changes.

M. NPT Metric. This module is for associates to log their NPT's in real time manner.



Start New NPT log

1. Select Team
2. Select task/ Function
   NOTE: Inactive NPT tasks will not be displayed in the selection.
3. Enter remarks (optional)
4. Click "Start" button. Once started, log will showed in the logs where there is a STOP button. See no. 9
   a. In our example "Start" button is hidden since we have a running NPT. See No. 9
   b. Only one NPT task at a time.
   c. Every time you start your NPT, all your running worktype metric will pause.

Logs. The logs displayed in the list were filtered by default with a 3 day range. 5,6,7,8 will help you filter the data you need.

5. Choose from the dropdown of NPT Task and the list will display matching task.
6. Choose from the dropdown of employees to display logs created by the selected employee. (This filter is available for leader access only)
7. Change start date and End date to display all logs that are within the range specified.
8. Refer to 7.

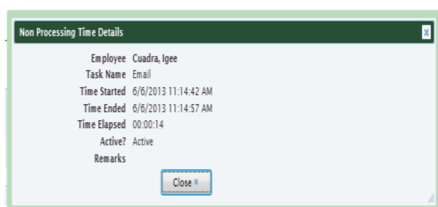
Stop a running NPT

9. Click the STOP button to stop the task. Elapsed time will be computed after stopping the task.
   NOTE: Starting/Resuming a new worktype metric will STOP a running NPT Task
   After stopping an NPT, START button will be available again for the next NPT Task.

See Details

10. By clicking the Details link on the right side of the row you want to check, a dialog box will show. (See below screenshot)

    a. Click Close button to close the details dialog.



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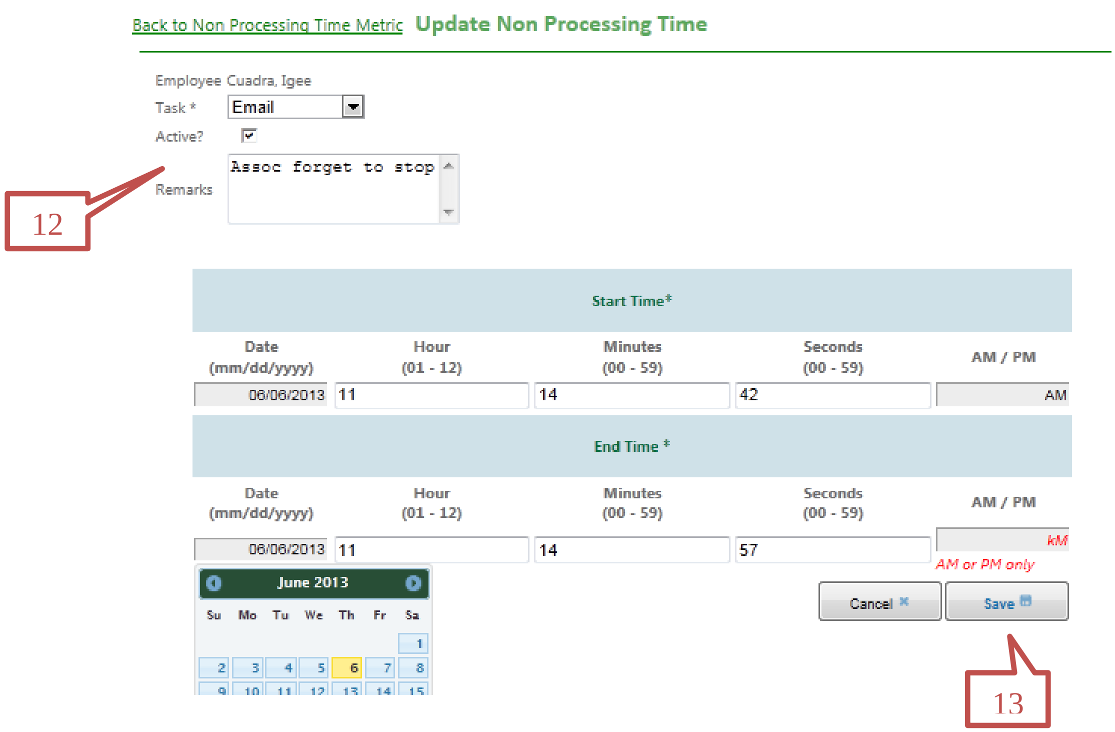
Editing NPT Metric (For leaders account only)

11. After clicking the edit link you will be redirected to the “Update Non Process Time” window.
12. You can now update the log

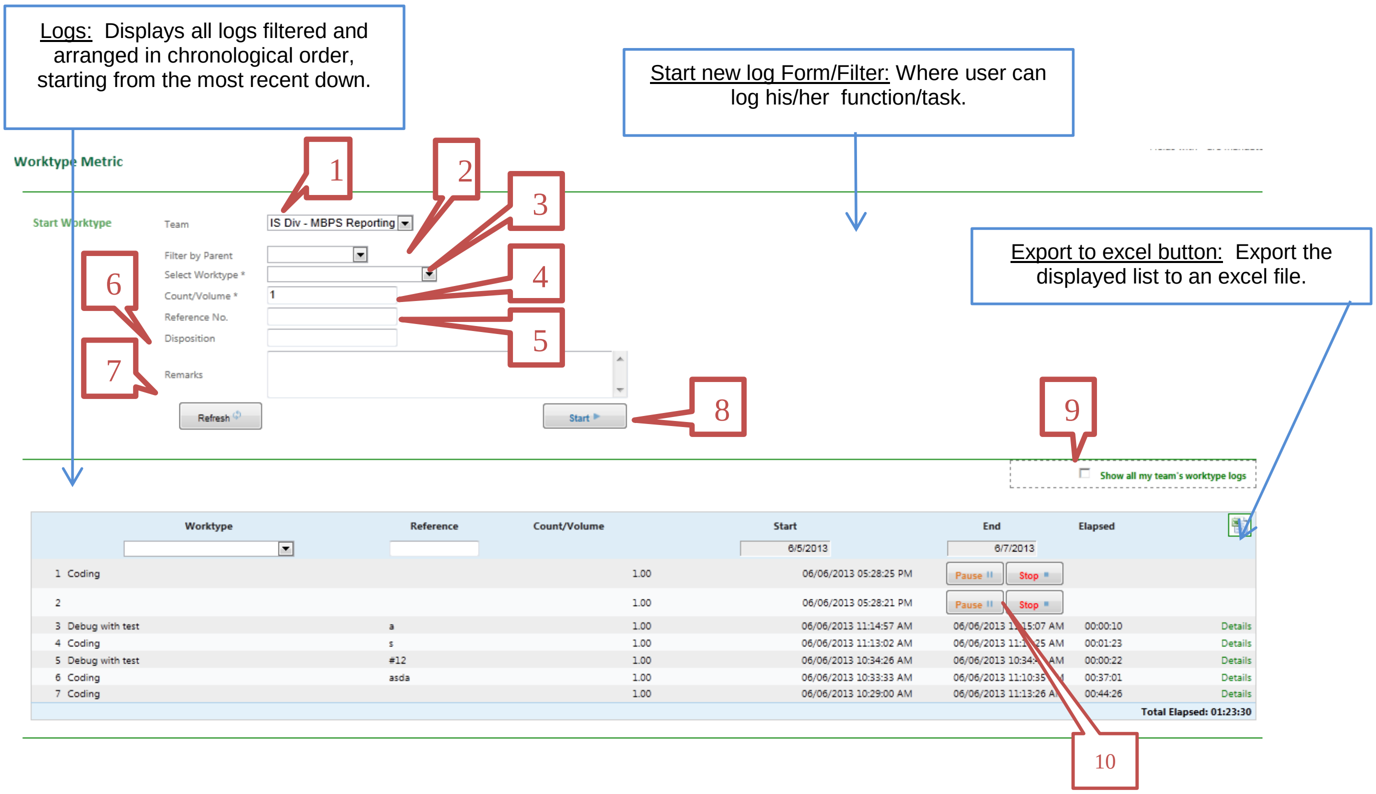
    SCENARIO: The system doesn’t allow anyone to delete any record. If one had mistakenly logged as task we can have the following as solution:

    a. Un-tick the ACTIVE field to exclude the log from computing performance.
    b. Make the Start time and End time equal to have a total computed time of 0.

    VALIDATIONS:
    Error messages will be displayed for invalid entries.
13. Click SAVE button to commit changes or Cancel if you don’t want to proceed with the changes. Any of these actions will redirect you to the main NPT metric window.



N. Worktype Metric. This module is for associates to log their work volumes in a real time manner.



Work Logs Display. By default the system displays your logs from the most recent and within the 3 day range indicated in the Start time and end time. You can also modify the filter like selecting the worktype, changing start and end date and specifying the reference to see the data you need.

Start New Function

6. Select Team
7. Select Parent worktype (not required). A helper to filter a work type by its parent. After selecting a parent the **Select work type** will be populated by all worktypes related to the selected parent.
   NOTES: Inactive Parent worktypes will not be displayed in the selection.
   Inactive worktypes will no longer be included in the selection. Change status to activate worktype again.
8. Select a worktype
9. Enter work count/volume
10. Enter Reference number

11. Enter Disposition or Status of your worktype
12. Enter notes, comments or remarks
13. Click “Start” button. Once started, log will be showed in the logs where there is a “PAUSE” button and “STOP” button. See no. 10
    a. In our example we have 2 running worktypes where worktype was indicated for the first and no worktype for the second.
        i. Take note that any running NPT will be stopped once a worktype is started.
    b. Click “Pause” button and it will be replaced by “Resume” button.
    c. Click resume and button will be replaced the “Stop” and “Pause” button.
        i. NOTE: Any running NPT will be stopped when you resume any worktype.

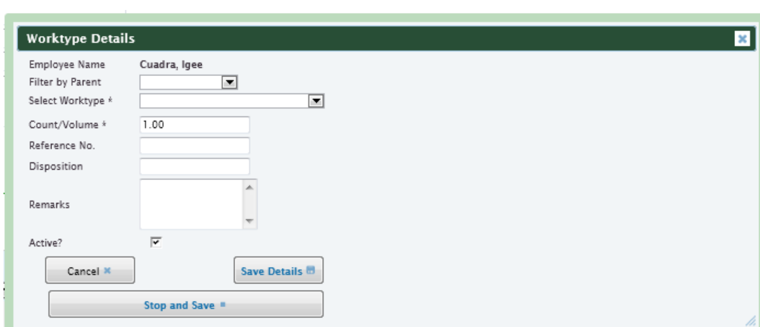
<u>STOP or SAVE DETAILS dialog box.</u> When clicking the “Stop” button. A dialog box will be displayed.

You can do two things:

A. **Save Details.** Useful when you just want to save details for your work without stopping it.
    a. Update the entries and click Save Details. Error will display for invalid items.
    b. After saving, system will remember the details you’ve entered and the log is still running.

B. **STOP the log and Save Details**.

    a. Check your entries and click Stop and save button and your worktype log will be stopped.
        i. Note that when you un-tick the active field the log will be inactive and therefore work log will not be included in the computation of your tracker.
        ii. HINT: Make sure that you have all the entries correct before stopping because once submitted only leaders have the access to edit the log.



iii. After stopping the system will compute the elapsed time of the log. See computation below:

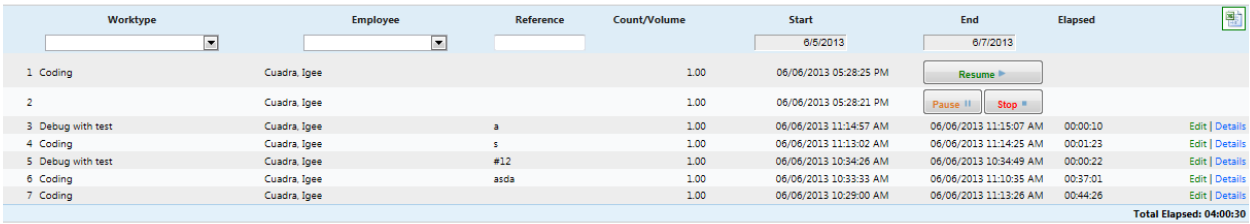
Formula:

T1 = Time end – time start
T2 = SUM (Time Resume – Time Pause)
Total Elapsed = T1 – T2

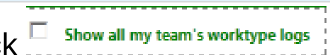
- Total Elapsed is expressed in HH:MM:SS format

Worktype	Time Start	Time Pause	Time Resume	Time End	Elapsed (HH:MM:SS)	Note
Work log 1	06/06/2013 11:14:57 AM			06/06/2013 11:15:07 AM	00:00:10	No interval (pause/resume)
Work log 2	06/06/2013 05:28:25 PM	6/6/2013 5:33:20 PM	6/6/2013 6:54:38 PM			
		6/6/2013 6:54:40 PM	6/6/2013 6:54:41 PM	06/06/2013 06:54:46 PM	00:05:02	User paused the log for 2 times

<u>The Leaders View.</u> Leaders have the access to editing logs and viewing logs created by his/her team's associates.



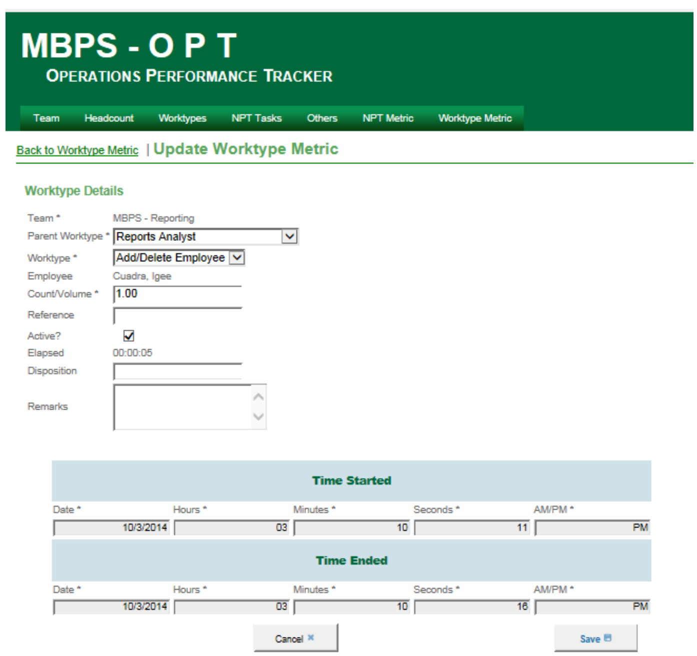
	Worktype	Employee	Reference	Count/Volume	Start	End	Elapsed	
					6/5/2013	6/7/2013		
1	Coding	Cuadra, Igee		1.00	06/06/2013 05:28:25 PM	Resume		
2		Cuadra, Igee		1.00	06/06/2013 05:28:21 PM	Pause Stop		
3	Debug with test	Cuadra, Igee	a	1.00	06/06/2013 11:14:57 AM	06/06/2013 11:15:07 AM	00:00:10	Edit | Details
4	Coding	Cuadra, Igee	s	1.00	06/06/2013 11:13:02 AM	06/06/2013 11:14:25 AM	00:01:23	Edit | Details
5	Debug with test	Cuadra, Igee	#12	1.00	06/06/2013 10:34:26 AM	06/06/2013 10:34:49 AM	00:00:22	Edit | Details
6	Coding	Cuadra, Igee	asda	1.00	06/06/2013 10:33:33 AM	06/06/2013 11:10:35 AM	00:37:01	Edit | Details
7	Coding	Cuadra, Igee		1.00	06/06/2013 10:29:00 AM	06/06/2013 11:13:26 AM	00:44:26	Edit | Details
								Total Elapsed: 04:00:30

1. To see all the work log of the team. Tick  on the Work logs form.

2. The list will display all the work logs in chronological manner in a 3 day range. There are available filters including the filter for employees. Select the employee Name from the dropdown and the list will display all logs indicated in the filter.

<u>Modify a work Log.</u>

3. Click the edit link on the row to update. The window will redirect to the "Edit Worktype Metric" Window.
4. Modify entries. Click "Save" button to save changes and "Cancel" to ignore and go back to Worktype metric window.



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4. Contingency Plan

4.1 In cases when the server is down, each associate will have to input their worklogs on the standard template then send to MBPS Reporting before shift.

5. Escalation Process

5.1 All issues, concerns and request should be file to MBPS ReAR

(***http:ato.ap.manulife.com/mbpsrear***)