

# **MBPS REPORTING**

## ***Operations Performance Tracker User Manual***

### **DIGITAL INFORMATION SERVICES**

### Summary of Changes

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### Document Approvers

<i>Approver</i>	<i>Title</i>	<i>Date Approved</i>
Alvin B. Salenga	Supervisor, MBPS Reporting	
Denmar C. Ong	AVP, Digital Information Services	

### Document Contacts

<i>Contacts Name</i>	<i>Contact Details</i>
Denmar C. Ong	+632 9815853 // +63920 9734789 // <a href="mailto:denmar_ong@manulife.com">denmar_ong@manulife.com</a>
Alvin B. Salenga	Alvin_B_Salenga@manulife.com

# *Table of Contents*

1. System Overview .....	4
2. Access Types.....	4
3. User Manual.....	5-27
A. Login.....	5
B. Attendance .....	6-7
C. Associates .....	8
D. Shift .....	9
E. Team Staff .....	10-11
F. Headcount Forecast .....	12
G. Parent Worktype .....	13
H. Worktype .....	14-15
I. Standard Processing Time (S.P.T) .....	16
J. NPT Task .....	17
K. Quality .....	18
L. Comments.....	19
M. NPT Metric .....	20-22
N. Worktype Metric .....	23-26
4. Contingency Plan.....	27
5. Escalation Process .....	27

# 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,

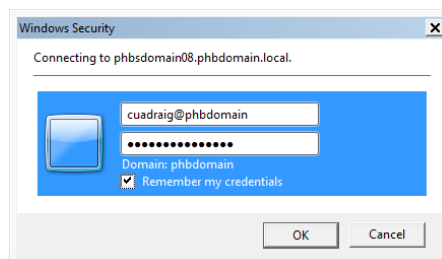
**2.2 Associate Access.** This type of access is granted to associates. This is limited to entry of time logs in NPT Metric and Worktype Metric.

## 3. User Manual

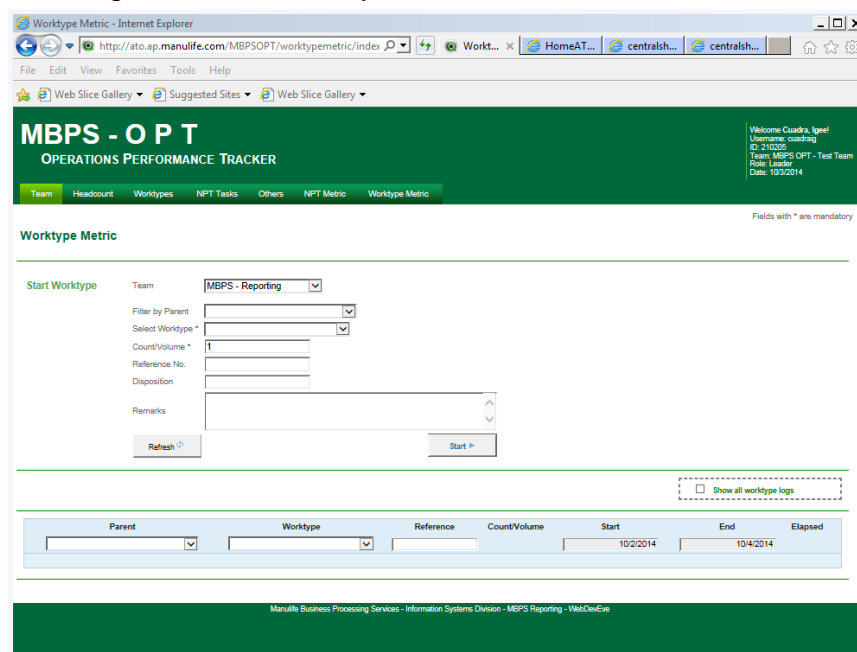
**A. LOGIN.** The system automatically detects the access when user successfully logged in to the system.

- Open your local Internet explorer.
- Copy link to the address bar. <http://ato.ap.manulife.com/mbpsopt>
- 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

#### Team Attendance

Fields with \* are mandatory

Filter Team  Month/Year

---

« Previous Jul 7, 2013 - Jul 13, 2013 Next »

Name	7 Sunday				8 Monday				9 Tuesday				10 Wednesday				11 Thursday				12 Friday				13 Saturday			
	P	VL	SL	OT/UT	P	VL	SL	OT/UT	P	VL	SL	OT/UT	P	VL	SL	OT/UT	P	VL	SL	OT/UT	P	VL	SL	OT/UT				
1 Almazan, April	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-				
2 Battad, Paulyn Marie	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-				
3 Caccad, Marissa	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-				
4 Carlos, Timothy Joshua	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-				
5 Cortes, Honorio	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-				
6 Cuadra, Igee	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-				
7 Ramos, Rosalie	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-				
8 Salenga, Alvin	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-				
9 San Jose, Edgar Allan	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-				
10 Yambot-Javier, Zara	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-				
Count: 10																												

## 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 1 for 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.	<input checked="" type="checkbox"/>	Date	Present	Vacation Leave	Sick Leave	O.T/U.T
1	<input checked="" type="checkbox"/>	6/1/2013	0	0	0	0
2	<input checked="" type="checkbox"/>	6/2/2013	0	0	0	0
3	<input checked="" type="checkbox"/>	6/3/2013	1	0	0	0
4	<input checked="" type="checkbox"/>	6/4/2013	1	0	0	0
5	<input checked="" type="checkbox"/>	6/5/2013	0	0	0	0
6	<input checked="" type="checkbox"/>	6/6/2013	0	0	0	0
7	<input checked="" type="checkbox"/>	6/7/2013	0	0	0	0
8	<input checked="" type="checkbox"/>	6/8/2013	0	0	0	0
9	<input checked="" type="checkbox"/>	6/9/2013	0	0	0	0
10	<input checked="" type="checkbox"/>	6/10/2013	0	0	0	0
11	<input checked="" type="checkbox"/>	6/11/2013	0	0	0	0
12	<input checked="" type="checkbox"/>	6/12/2013	0	0	0	0
13	<input checked="" type="checkbox"/>	6/13/2013	0	0	0	0
14	<input checked="" type="checkbox"/>	6/14/2013	0	0	0	0
15	<input checked="" type="checkbox"/>	6/15/2013	0	0	0	0
16	<input checked="" type="checkbox"/>	6/16/2013	0	0	0	0
17	<input checked="" type="checkbox"/>	6/17/2013	0	0	0	0
18	<input checked="" type="checkbox"/>	6/18/2013	0	0	0	0
19	<input checked="" type="checkbox"/>	6/19/2013	0	0	0	0
20	<input checked="" type="checkbox"/>	6/20/2013	0	0	0	0
21	<input checked="" type="checkbox"/>	6/21/2013	0	0	0	0
22	<input checked="" type="checkbox"/>	6/22/2013	0	0	0	0
23	<input checked="" type="checkbox"/>	6/23/2013	0	0	0	0
24	<input checked="" type="checkbox"/>	6/24/2013	0	0	0	0
25	<input checked="" type="checkbox"/>	6/25/2013	0	0	0	0
26	<input checked="" type="checkbox"/>	6/26/2013	0	0	0	0
27	<input checked="" type="checkbox"/>	6/27/2013	0	0	0	0
28	<input checked="" type="checkbox"/>	6/28/2013	0	0	0	0
29	<input checked="" type="checkbox"/>	6/29/2013	0	0	0	0
30	<input checked="" type="checkbox"/>	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

**Filter:** Select team and date you want to view/edit

**Comment Form:** Where you can update/ view details for the selected month and year.

**MBPS - O P T**  
OPERATIONS PERFORMANCE TRACKER

Team Headcount Worktypes NPT Tasks Others NPT Metrics Worktype Metrics

**Associates**

Team \* MBPS - Reporting

1

Team Business Unit Support Support  
Team Name MBPS - Reporting  
Team Short Name IS DIV REPORTING

**Associates**

Workday ID	Employee	Bill Code (B.C.)	B.C. Description	FTE(%)	Employee Status
1 211899	Battad, Paulyn Marie	BPM18	Business Analyst / Reporting Analyst (Day)	100	Active
2 208833	Carico, Timothy Joshua				Active
3 137743	Cortez, Honorio	NBN	Non-Billable (Night)	100	Active
4 210205	Cuadra, Igee	CCM02	Call Centre (Night Shift, English)	100	Active
5 221595	Florez, Bianca				Active
6 223307	Genorangan, Ely				Active
7 42596	Madan, Rishi				Active
8 213758	Ong, Denmar				Active
9 112458	Rodriguez, Ohel	NBD	Non-Billable (Day)	100	Active
10 215165	San Jose, Edgar Allan				Active
11 138902	Sy, Geine	CCM02	Call Centre (Night Shift, English)	100	Active
12 777777	User Test				Active
13 135035	Yambon-Javier, Zara	NBD	Non-Billable (Day)	100	Active

Count: 13

2

### Viewing Accuracy Details

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

### Edit Associate

- Click on the “Edit” link.

**MBPS - O P T**  
OPERATIONS PERFORMANCE TRACKER

Team Headcount Worktypes NPT Tasks Others NPT Metrics Worktype Metrics

[Back to Associates](#) [Edit Associate Details](#)

Workday ID 211899  
Name Battad, Paulyn Marie  
Bill Code Description Business Analyst / Reporting Analyst (Day)  
Full Time Employee(1-100%) 100

Cancel Save

- Enter Bill Code Description and Full Time Employee (FTE) percentage.
- 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.

### DISPLAY SHIFT SUMMARY

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

### EDIT SHIFT

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

**Filter:** Select team and date you want to view/edit

**Shift Summary Form:** Where you can update/ view details for the selected month and year.

**Edit Shift Form:** Where you can update/ view details for the selected month and year.

**MBPS - OPT OPERATIONS PERFORMANCE TRACKER**

Team: MBPS OPT - Test Team | Month/Year: October 2014 | View Shift

**Select Week to Update Shift**

Week	Employee	Shift	10/5/2014 - 10/11/2014	10/12/2014 - 10/18/2014	10/19/2014 - 10/25/2014	10/26/2014 - 11/1/2014
1	Batas, Paulyn Marie	02:30 PM - 11:30 PM	02:30 PM - 11:30 PM	02:30 PM - 11:30 PM	02:30 PM - 11:30 PM	02:30 PM - 11:30 PM
2	Casac, Marissa	07:00 PM - 04:00 AM	07:00 PM - 04:00 AM	07:00 PM - 04:00 AM	07:00 PM - 04:00 AM	07:00 PM - 04:00 AM
3	Cuadra, Igee	06:00 PM - 03:00 AM	06:00 PM - 03:00 AM	06:00 PM - 03:00 AM	06:00 PM - 03:00 AM	06:00 PM - 03:00 AM
4	King, Samantha	03:00 AM - 05:00 PM	03:00 AM - 05:00 PM	03:00 AM - 05:00 PM	03:00 AM - 05:00 PM	03:00 AM - 05:00 PM
5	preoad, preoad	09:00 AM - 05:00 PM	09:00 AM - 05:00 PM	09:00 AM - 05:00 PM	09:00 AM - 05:00 PM	09:00 AM - 05:00 PM
6	Saenga, Ahim	09:00 AM - 05:00 PM	09:00 AM - 05:00 PM	09:00 AM - 05:00 PM	09:00 AM - 05:00 PM	09:00 AM - 05:00 PM
						TOTAL: 6

**Update Employee Shift**

Employee	Week	Shift
<input type="checkbox"/> Batas, Paulyn Marie	9/28/2014-10/4/2014	12:00AM - 09:00 AM
<input type="checkbox"/> Casac, Marissa	9/28/2014-10/4/2014	12:00AM - 09:00 AM
<input type="checkbox"/> Cuadra, Igee	9/28/2014-10/4/2014	12:00AM - 09:00 AM
<input type="checkbox"/> King, Samantha	9/28/2014-10/4/2014	12:00AM - 09:00 AM
<input type="checkbox"/> preoad, preoad	9/28/2014-10/4/2014	12:00AM - 09:00 AM
<input type="checkbox"/> Ramos, Rosale	9/28/2014-10/4/2014	12:00AM - 09:00 AM
<input type="checkbox"/> Saenga, Ahim	9/28/2014-10/4/2014	12:00AM - 09:00 AM

Save | Back to top

**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.

Add Team Staff Form: Where user can add new staff

List: Displays details to all added team staffs in your team

Fields with \* are mandatory

**Manage Team's Staff**

**Add Team Staff**

Team \*

Job Type \*

Bill Code \*

Full Time Employee (1 - 100 %) \*

**Add Staff +**

**Team's Staff**

Job Category	Job Type	Bill Code	Full Time Employee(%)	Status	
01. Billable Staff	Accounting Specialist (Billable Staff)	BPM01	1.00%	Active	Edit
02. Billable Staff	Accounting Specialist (Billable Staff)	BPM02	1.00%	Active	Edit
03. Billable Staff	Accounting Specialist (Billable Staff)	BPM10	1.00%	Active	Edit
04. Team Overhead	Accounting Specialist (Team Overhead)	BPM01	1.00%	Active	Edit
05. Team Overhead	Accounting Specialist (Team Overhead)	BPM03	1.00%	Active	Edit
06. Team Overhead	Accounting Specialist (Team Overhead)	BPM10	1.00%	Active	Edit
07. Team Overhead	Accounting Specialist (Team Overhead)	BPM11	1.00%	Active	Edit
08. Team Overhead	Admin Specialist	BPM01	1.00%	Active	Edit
09. Billable Staff	Associate	BPM01	100.00%	Active	Edit
10. Billable Staff	Associate	BPM04	1.00%	Active	Edit
11. Billable Staff	Associate (Alt. Billing)	BPM04	1.00%	Active	Edit
12. Billable Staff	Associate (Chengdu)	BPM04	1.00%	Active	Edit
13. Billable Staff	Associate DBA	BPM24	100.00%	Active	Edit
14. Billable Staff	Billable Manager	BPM03	1.00%	Active	Edit
15. Billable Staff	Contractual Associate	BPM05	1.00%	Active	Edit
16. Team Overhead	Part-time MBPS Resource	BPM26	1.23%	Active	Edit
17. Billable Staff	Quality Analyst (Internal)	BPM10	10.90%	Active	Edit
18. Billable Staff	Reporting Analyst (Internal)	BPM05	100.00%	Active	Edit
19. Billable Staff	Reporting Analyst (Internal)	BPM22	100.00%	Active	Edit
20. Team Overhead	Team Director	NBD	1.00%	Active	Edit

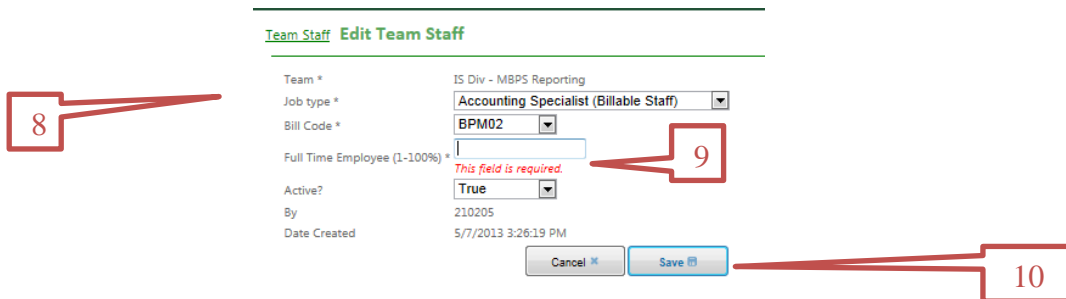
Count: 20

### Adding Team Staff

- Select Team
- Select Job type
- Select Bill code
- Enter FTE value
- Click “Add Staff” button to save.
- 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.



The screenshot shows the 'Edit Team Staff' window. At the top, there are two tabs: 'Team Staff' and 'Edit Team Staff', with the latter being active. The form contains the following fields and controls:

- Team \***: A dropdown menu showing 'IS Div - MBPS Reporting'.
- Job type \***: A dropdown menu showing 'Accounting Specialist (Billable Staff)'.
- Bill Code \***: A dropdown menu showing 'BPM02'.
- Full Time Employee (1-100%) \***: An empty text input field. A red error message 'This field is required.' is displayed below it.
- Active?**: A dropdown menu showing 'True'.
- By**: A text field showing '210205'.
- Date Created**: A text field showing '5/7/2013 3:26:19 PM'.
- At the bottom right, there are two buttons: 'Cancel' and 'Save'.

Numbered callouts are present:

- 8**: Points to the 'Edit Team Staff' tab.
- 9**: Points to the 'Full Time Employee (1-100%)' field and its error message.
- 10**: Points to the 'Save' button.

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

Filter

Select the team and year you want to see.

Update Headcount Form

Where user can update the headcount

LIST

Displays headcount forecast for the selected year

**Team Headcount Forecast**

Select Team and Year

Team: IS Div - MBPS Reporting Year: 2014

Select month to edit headcount: September 1

Job Category	Job Title	Billing Code	Shift	FTE(%)	January	February	March	April	May	June	July	August	September	October	November	December
01 Billable Staff	Accounting Specialist (Billable Staff)	BPM01	D	1.00	0	0	0	0	0	0	0	0	0	0	0	0
02 Billable Staff	Associate DBA	BPM24	N	100.00	2	2	2	2	2	2	5	5	5	5	5	5
03 Billable Staff	Reporting Analyst (Internal)	BPM05	N	100.00	0	0	0	0	0	0	0	0	0	20	20	20
04 Team Overhead	Accounting Specialist (Team Overhead)	BPM01	D	1.00	0	0	0	0	0	0	0	0	0	0	0	0
05 Team Overhead	Admin Specialist	BPM01	D	1.00	0	0	0	0	0	0	0	0	0	20	20	20
<b>Monthly Total</b>					2	2	2	2	2	2	5	5	5	45	45	45
<b>Yearly Total</b>					162											

Reload Staff 2

**Update headcount for September 2014**

Note: Inactive team staffs will not appear here.

3

4

	Job Category	Job Title	Billing Code	Headcount
<input type="checkbox"/>	Billable Staff	Accounting Specialist (Billable Staff)	BPM01	<input type="text" value="0"/>
<input type="checkbox"/>	Billable Staff	Associate DBA	BPM24	<input type="text" value="5"/>
<input type="checkbox"/>	Billable Staff	Reporting Analyst (Internal)	BPM05	<input type="text" value="0"/>
<input type="checkbox"/>	Team Overhead	Accounting Specialist (Team Overhead)	BPM01	<input type="text" value="0"/>
<input type="checkbox"/>	Team Overhead	Admin Specialist	BPM01	<input type="text" value="0"/>

5

6

Save Back to top

**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 ☒ 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 Worktype Form/Filter:  
Where user can add new worktype

---

**Team Parent Worktypes** Fields with \* are mandatory

Add new parent worktype

Team \*

Parent Worktype \*  Parent worktype already exist

List:  
Displays added worktypes per selected team

---

Added Parent Worktypes

Parent Worktype	Status	Edit
01 Development	Active	Inactive

4

### Add New Parent Worktype

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

### Edit Worktype

- On the right side of the row you want to update, click “Edit” link. A dialog box will appear.
- 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*”.
- Click “Save” button to save changes or “Cancel” button to ignore changes.

**Edit Parent Worktype**

Parent Worktype \*

Active? ☒

4

5

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

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

**Manage Worktypes**

Fill up required fields to create new worktype

Team \* IS Div - MBPS Reporting

Parent Worktype BLANK

Worktype Name \* Upload report  
*Worktype already exist*

Business Unit \* Target Unit \* 0

Standard Processing Time (minutes) \* 0

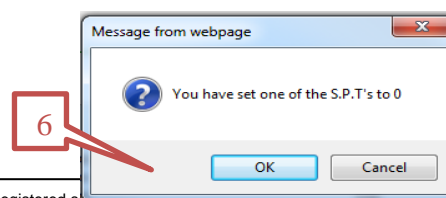
Reset Add Worktype

**Team worktypes**

Parent Worktype	Worktype	Standard Processing Time (minutes)		Status	Details	
		Business Unit	Target Unit		Trans. Volume	
01. BLANK	Upload report	1.00	2.00	Active	No	Edit
02. Debugging	Debug with test	1.00	1.00	Active	No	Edit
03. Development	DB Backup	0.00	0.00	Active	No	Edit
04. Development	p1	0.00	0.00	Active	No	Edit
05. Development	p1-a	0.00	0.00	Active	No	Edit
06. Development	p1-b	0.00	0.00	Active	No	Edit
07. MVC3	Regression	0.00	0.00	Active	No	Edit

### Add New Worktype

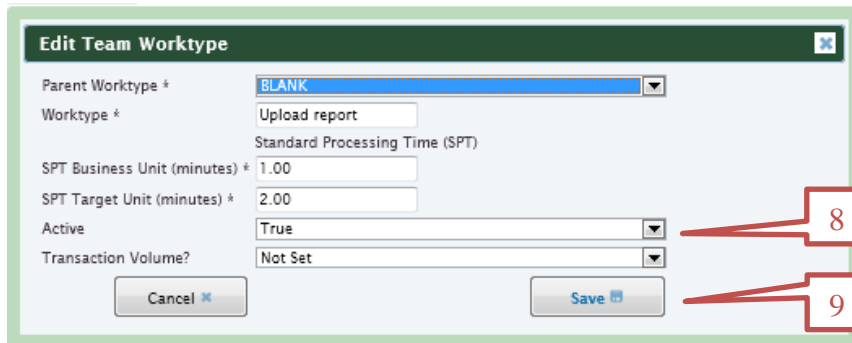
- Select Team
- Select parent worktype.  
NOTE: Inactive parent worktypes will not be displayed in the selection.
- Enter work type name. Error message will display for duplicate entries.
  - Example:  
Not duplicate: Parent1 - worktype1  
Parent2 - worktype1  
Duplicate: Parent2 - worktype2  
Parent2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



**Edit Team Worktype**

Parent Worktype \* BLANK

Worktype \* Upload report  
Standard Processing Time (SPT)

SPT Business Unit (minutes) \* 1.00

SPT Target Unit (minutes) \* 2.00

Active True

Transaction Volume? Not Set

Cancel Save

- 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.

### DISPLAY SPT SUMMARY

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

### EDIT SPT

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.

Filter:  
Select team and date you want to view/edit

SPT Summary Form:  
Where you can update/ view details for the selected month

Edit SPT Form:  
Where you can update/ view SPT for the selected month

**Manage Standard Processing Time (SPT)**

Select Team and Year  
Team: MBPS OPT - Test Team Year: 2014

Select Month to update Standard Processing Time  
Month: December

Parent Worktype	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
OT - value	10	10	10	10	10	10	10	10	10	10	10	10
OT - sample	10	10	10	10	10	10	10	10	10	10	10	10
OT - number 4	20	20	20	20	20	20	20	20	20	20	20	20
OT - sample	2	2	2	2	2	2	2	2	2	2	2	2
OT - Add team	52.5	13.2	52.5	13.2	52.5	13.2	52.5	13.2	52.5	13.2	52.5	13.2
OT - sample123	52.5	13.2	52.5	13.2	52.5	13.2	52.5	13.2	52.5	13.2	52.5	13.2
OT - Development	Forecast											
OT - Parent	sample											
OT - Reports	Excel Report											

Count: 10

**Update SPT for December 2014**

	Parent	Worktype	Business Unit (SPT BU)	Target Unit (SPT TU)
<input type="checkbox"/>	OT - value	Add team	5	5
<input type="checkbox"/>	OT - sample	number 4	20	20
<input type="checkbox"/>	OT - number 4	sample	10	10
<input type="checkbox"/>	OT - sample	sample	10	10
<input type="checkbox"/>	OT - Add team	sample123	52.5	13.2
<input type="checkbox"/>	OT - sample123	value	10	10
<input type="checkbox"/>	OT - Development	Forecast	10	10
<input type="checkbox"/>	OT - Parent	sample	10	10
<input type="checkbox"/>	OT - Reports	Excel Report	50	45

Back to top

Save



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

**Team NPT Task Form/Filter**  
Where user can add new non processing task for the team

**List**  
Displays added NPT tasks per selected team

Team Non Processing Time Tasks

Fill up required fields to add new non processing task

Team \* IS Div - MBPS Reporting

Task \* Coaching  
NPT Task already exist

Reset Add Task

Team Tasks

Task Name	Status	By	Date Created	
01. Coaching	Active	cuadraig	04/15/2013	Edit
02. Email	Active	javierza	05/22/2013	Edit
03. Idle Time	Active	salengal	04/15/2013	Edit
04. Maintain PT	Active	cuadraig	05/28/2013	Edit
05. meeting	Active	cuadraig	04/04/2013	Edit
06. Samples	Inactive	cuadraig	04/11/2013	Edit
07. Team building	Active	cuadraig	04/25/2013	Edit
08. Training	Active	cuadraig	04/11/2013	Edit
09. Wee Time	Active	joseed	04/25/2013	Edit

Active : 8 Inactive : 1

### 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.

**Edit Non Processing Task**

Task \* Team building

Active True

Cancel Save

**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.

The screenshot shows the 'Others' menu with a 'Filter' dropdown and a 'Month/Year' input field. Below this is the 'Accuracy Details Form' for 'June 2013'. The form includes sections for 'Business Days', 'Accuracy', and 'Service Level Achievement'. Callout 1 points to the 'Team' dropdown, 2 to the 'Month/Year' input, 3 to the 'Go' button, 4 to the 'Accuracy Details for April 2013' section, 5 to the 'Business Days' section, 6 to the 'Accuracy' section, and 7 to the 'Save' button.

**Filter:** Select team and date you want to view/edit

**Accuracy Details Form:** Where you can update/ view details for the selected month and year.

**Others**

**Filter**

Team: IS Div - MBPS Reporting

Month/Year: June 2013

**Go**

**Accuracy Details for April 2013**

**Business Days**

No. of Business Days \*

**Accuracy**

1st Pass Accuracy \*

2nd Pass Accuracy \*

3rd Pass Accuracy \*

**Service Level Achievement**

No. of items Beyond Standard \*

No. of items Within Standard \*

**Cancel** **Save**

Viewing Accuracy Details

- Select Team from Filter
- Select Month and Year from Filter
- Click "Go" button to proceed
- 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

- Repeat step 1-4. Update the fields with valid values.
- Error message will be displayed for invalid entries
- 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.

The screenshot displays the MBPS - OPT OPERATIONS PERFORMANCE TRACKER interface. At the top, there is a navigation bar with tabs: Team, Headcount, Worktypes, NPT Tasks, Others, NPT Metrics, and Worktype Metrics. Below this, the 'Comments and Meeting Details' section is visible. It includes a 'Filter' section with a 'Team' dropdown set to 'MBPS OPT - Test Team' and a 'Month/Year' dropdown set to 'October 2014'. A 'Go' button is next to the date. Below the filter, there is a 'Comments and Meeting Details' table. The table has a 'CATEGORY' column and a 'REMARKS' column. A note states: 'NOTE: Maximum of 1000 characters including spaces is allowed for each category'. A red box with the number '4' highlights the 'REMARKS' input area. Above the table, there is a 'Comment Form' section with a text area for entering meeting details. A note states: 'NOTE: This will be displayed in the front page of the report'. A red box with the number '3' highlights the 'Enter Meeting Details' text area. A red box with the number '1' highlights the 'Team' dropdown, and a red box with the number '2' highlights the 'Month/Year' dropdown.

**Viewing Accuracy Details**

- Select Team from Filter
- Select Month and Year from Filter
- Click “Go” button to proceed
- 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**

- Repeat step 1-4. Update the fields with valid values.
- 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.

**Logs:**  
Displays all logs filtered and arranged in chronological order, starting from the most recent down.

**New NPT log Form/Filter:** Where user can log his/her NPT.

**Export to excel button:** Export the displayed list to an excel file.

Fields with \* are mandat

**Non Processing Time Metrics**

**Start New Task**

Team \* IS Div - MBPS Reporting

Task/Function \*

Remarks

Refresh

**Logs**

NPT Task

Employee

Start Date

End Date

Elapsed

No.	NPT Task	Employee	Start Date	End Date	Elapsed	
1	Training	Cuadra, Igee	06/06/2013 02:58:29 PM	06/06/2013 11:14:57 AM	00:00:14	Stop
2	Email	Cuadra, Igee	06/06/2013 11:14:42 AM	06/06/2013 11:14:57 AM	00:00:14	Edit Details

Total: 00:00:14

**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

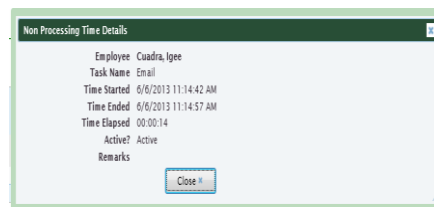
9. Click the STOP button to stop the task. Elapsed time will be computed after stopping the task.

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.



## 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.

[Back to Non Processing Time Metric](#) **Update Non Processing Time**

Employee Cuadra, Igee

Task \* Email

Active? ☒

Remarks Assoc forget to stop

**Start Time\***

Date (mm/dd/yyyy)	Hour (01 - 12)	Minutes (00 - 59)	Seconds (00 - 59)	AM / PM
<span style="border: 1px solid #ccc; padding: 2px;">06/06/2013</span>	<span style="border: 1px solid #ccc; padding: 2px;">11</span>	<span style="border: 1px solid #ccc; padding: 2px;">14</span>	<span style="border: 1px solid #ccc; padding: 2px;">42</span>	<span style="border: 1px solid #ccc; padding: 2px;">AM</span>

**End Time \***

Date (mm/dd/yyyy)	Hour (01 - 12)	Minutes (00 - 59)	Seconds (00 - 59)	AM / PM
<span style="border: 1px solid #ccc; padding: 2px;">06/06/2013</span>	<span style="border: 1px solid #ccc; padding: 2px;">11</span>	<span style="border: 1px solid #ccc; padding: 2px;">14</span>	<span style="border: 1px solid #ccc; padding: 2px;">57</span>	<span style="border: 1px solid #ccc; padding: 2px;">AM</span> <span style="color: red; font-size: small;">kM</span>

June 2013

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15

Cancel

Save

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

**Logs:** Displays all logs filtered and arranged in chronological order, starting from the most recent down.

**Start new log Form/Filter:** Where user can log his/her function/task.

**Export to excel button:** Export the displayed list to an excel file.

Worktype	Reference	Count/Volume	Start	End	Elapsed	
1 Coding		1.00	06/06/2013 05:28:25 PM	06/07/2013		
2		1.00	06/06/2013 05:28:21 PM			
3 Debug with test	a	1.00	06/06/2013 11:14:57 AM	06/06/2013 11:15:07 AM	00:00:10	Details
4 Coding	s	1.00	06/06/2013 11:13:02 AM	06/06/2013 11:13:25 AM	00:01:23	Details
5 Debug with test	#12	1.00	06/06/2013 10:34:26 AM	06/06/2013 10:34:41 AM	00:00:22	Details
6 Coding	asda	1.00	06/06/2013 10:33:33 AM	06/06/2013 11:10:35 AM	00:37:01	Details
7 Coding		1.00	06/06/2013 10:29:00 AM	06/06/2013 11:13:26 AM	00:44:26	Details
					<b>Total Elapsed: 01:23:30</b>	

**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

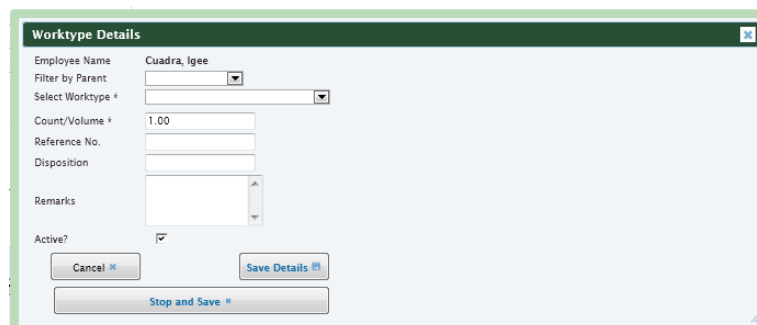
6. Select Team
7. Select Parent worktype (not required). A helper to filter a work type by its parent. After selecting a parent the **Select work type** will be populated by all worktypes related to the selected parent.  
NOTES: Inactive Parent worktypes will not be displayed in the selection.  
Inactive 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.

STOP or SAVE DETAILS dialog box. 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:

$T1 = \text{Time end} - \text{time start}$

$T2 = \text{SUM} (\text{Time Resume} - \text{Time Pause})$

$\text{Total Elapsed} = T1 - T2$

- 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

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

☒ Show all my team's worktype logs

Worktype	Employee	Reference	Count/Volume	Start	End	Elapsed	
1 Coding	Cuadra, Igee		1.00	06/06/2013 05:28:25 PM	06/07/2013		
2	Cuadra, Igee		1.00	06/06/2013 05:28:21 PM			
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 ☒ Show all my team's worktype logs 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.

### Modify a work Log.

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.

**MBPS - O P T**  
 OPERATIONS PERFORMANCE TRACKER

[Team](#)
[Headcount](#)
[Worktypes](#)
[NPT Tasks](#)
[Others](#)
[NPT Metric](#)
[Worktype Metric](#)

[Back to Worktype Metric](#) | [Update Worktype Metric](#)

**Worktype Details**  
 Team \* MBPS - Reporting  
 Parent Worktype \* Reports Analyst  
 Worktype \* Add/Delete Employee  
 Employee Cuadra, Igee  
 Count/Volume \* 1.00  
 Reference  
 Active? ☒  
 Elapsed 00:00:05  
 Disposition  
 Remarks

**Time Started**  
 Date \* 10/3/2014 Hours \* 03 Minutes \* 10 Seconds \* 11 AM/PM \* PM  
**Time Ended**  
 Date \* 10/3/2014 Hours \* 03 Minutes \* 10 Seconds \* 16 AM/PM \* PM  
 Cancel Save

---

## 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>)