Efficiency Plus User GuidLine

Contents

Introduction

Efficiency plus is a system which will help us to collect event data , track event time line and display a dashboard that can support decision making . There are asset of functions which make sure the target become true in this system .In this version of system we only partly release blow functions: Create Event , Edit Event ,Create Post Event , Edit Post Event , Export to Excel file , Cancel Event , Reopen Event ,Set Event Permission , Copy Event and Event Time line View. In the following chapters , we will display how to make the system work well with upper functions.
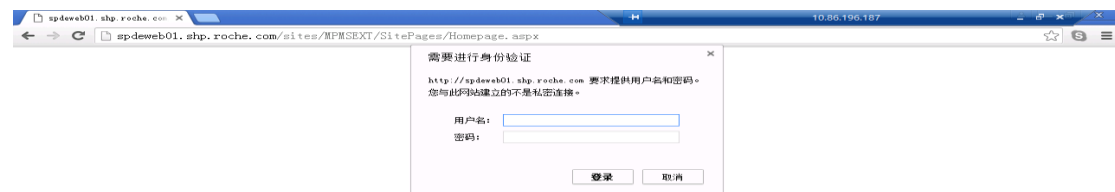
1 System login and Home Page View

1.1 System Login

Before you try to login the system ,please make sure your AD account(login name of local desktop) has be added to system's permission group , if you are new , please contact Charllotte.zhao@roche.com who is system administrator and has the permission to add user to the group.

Then please click or copy the below link:

http://spdeweb01.shp.roche.com/sites/MPMSEXT/SitePages/Homepage.aspx(testing environment) to the chrome browser (Note : System default available browser is chrome for some of html 5 element was used in it for better user experience).browser will ask you for username and password that is same with your AD account and Password , If you have save these in your browser cookie , system will use them to login the system automatically. Like the below picture:

After you login success, homepage will be displayed as default page of system like this

1.2 Home Page Views

1.2.1 Left navigation

As first sight of home page, we can find few links are displayed like below picture :
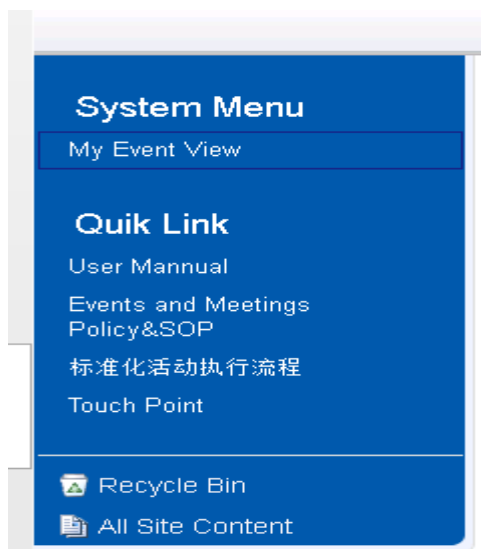
"System Menu" is navigation category of system link which link to other pages or views of page."My Event View" is navigate to display a view to list all of events which you can view or edit.

"Quick Link" is a group of link to other resource from outside system . "User Manual" link to user guide line download."Events and meeting policy&SOP" link to training document where store them."标准化活动执行流程" link to training document where store them."Touch Point" link to where event report stored in touch point.

1.2.2 My Event View

"My Event View " is a list of event which you created and you can view or edit like below list
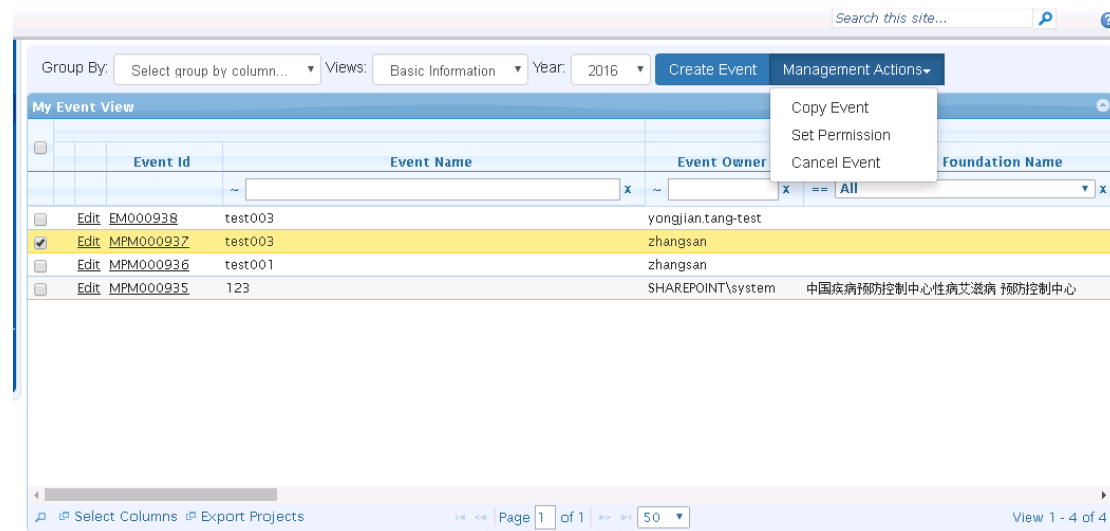
"Group By" function is top of list that can group event by Event Status , Event Level , Event Type and Start Time like following image:
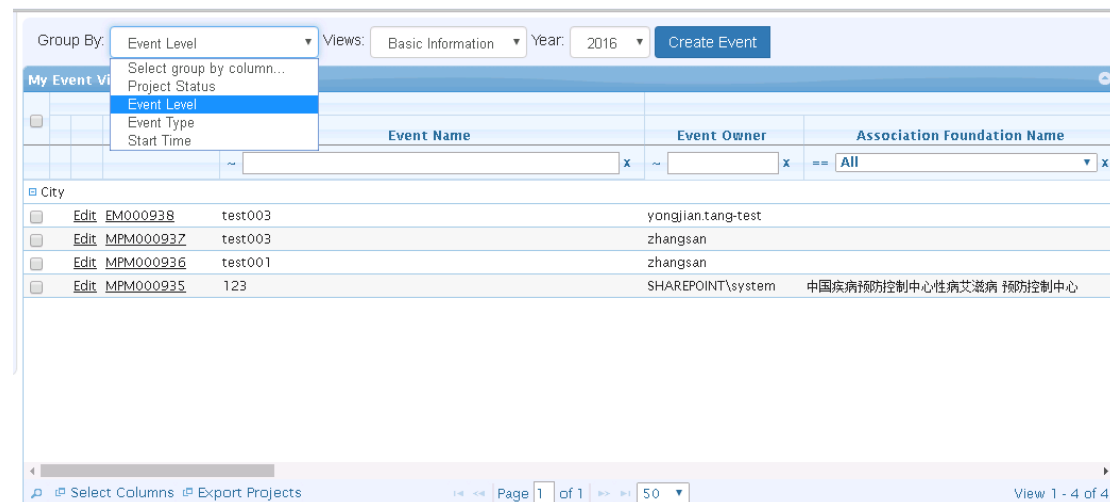

"Views" is a function that can change Event View by change selection of drop-down-list , in this list contain four views : All , Basic Information ,Budget, Time Line , specially, All view is combine with other three views.

"Year" is a function which can loading events with selected year

"Create Event" button is navigate button , it can navigate "Create Event" Page

When you select an item "Management Actions " will be displayed in the top of list ,after click the button these functions will be listed like below image:
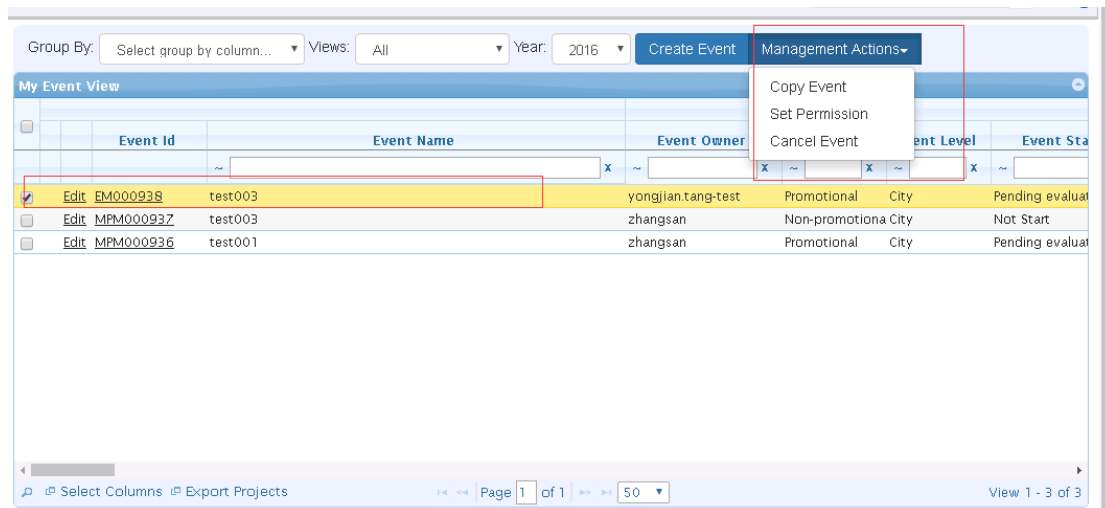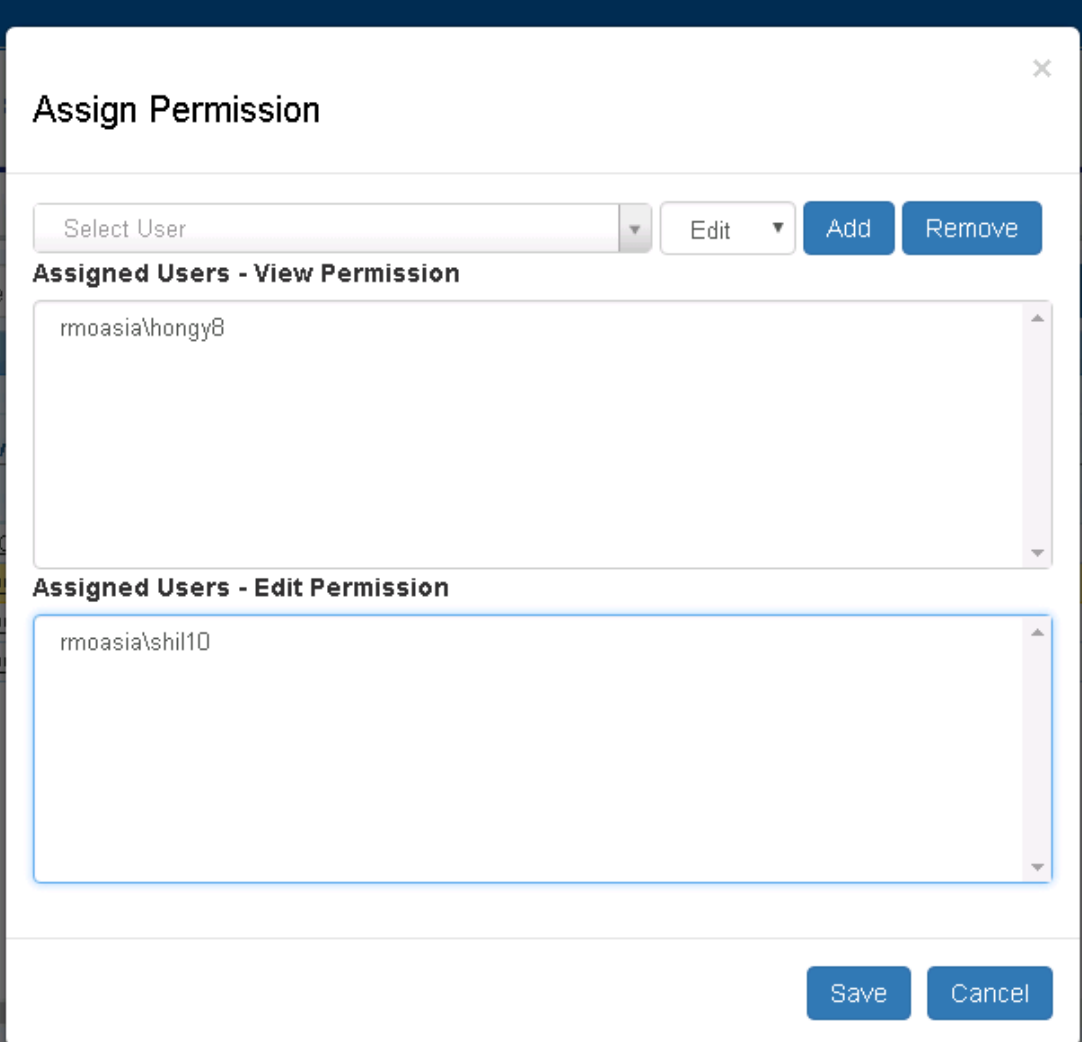
"Copy Event" function can copy selected event to "Create Event" page, it only copy the basic information to new event.it reduce inputs for basic information already was filled to basic information section. Following picture show the view after click copy event function:

"Set Permission " function will grant another user with edit or view permission to selected event. Grant Permission view like below:
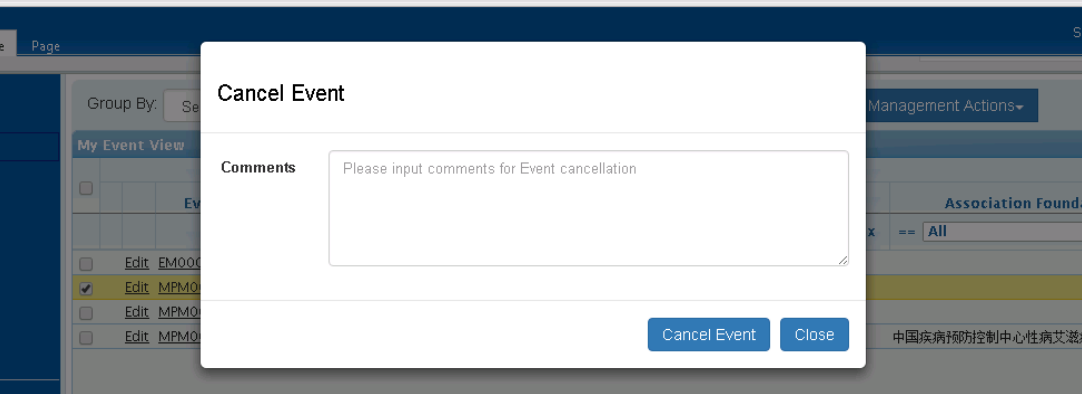
If you want to grant some permission of selected event to another user , you user enter the user name who you want to grant and choose the permission (view :user only has read permission ,edit: user has read and read permission) click add ,the user name will be added to their list box like below :

If you want to remove some user from list , you should select the user that you want to remove and click remove button. At last click "save" button to save changes.

"Cancel Event " function usually use to cancel the selected event if this event is canceled in real world , this view like below:

After you enter cancellation comment ,you need click "Cancel Event" button to submit the request to the server ,"close" button only close dialog without any action.

"Reopen Event" function is visible after selected event is canceled , it will reopen the event if we need it back.

"Select Columns" function is at the bottom of list , a dialog will display after you click it like below:
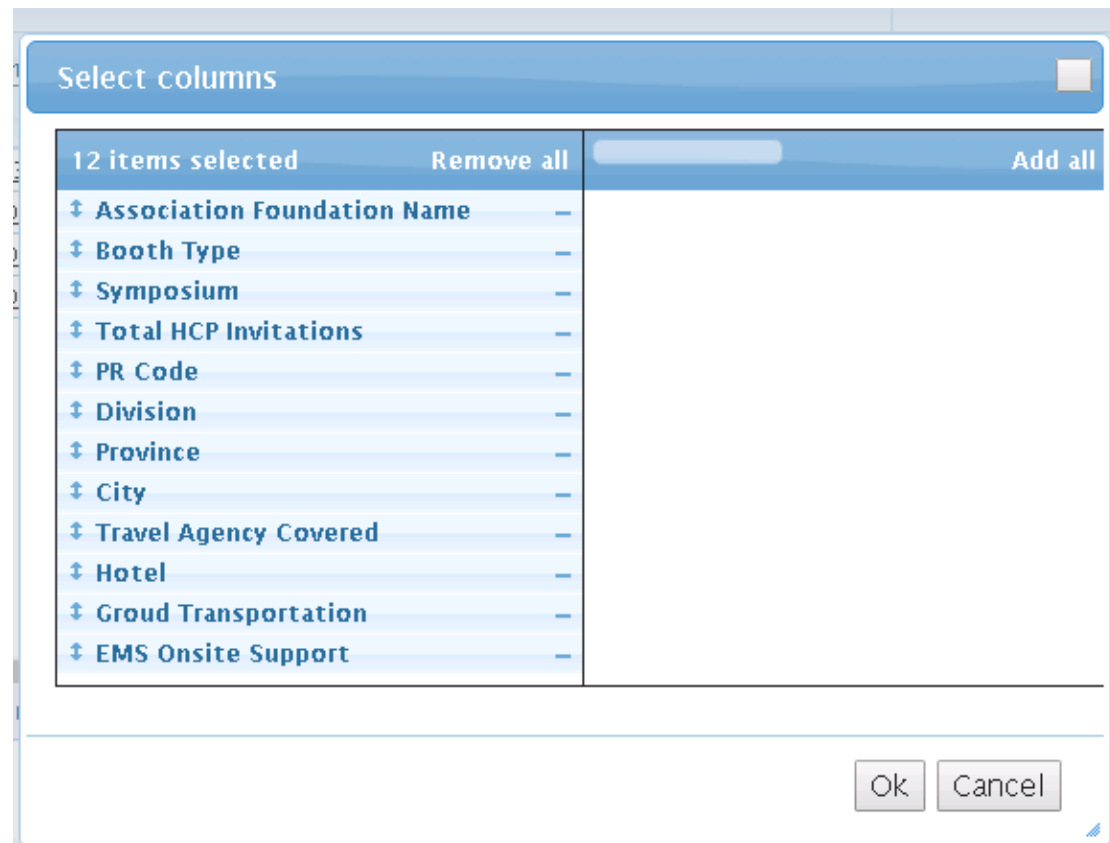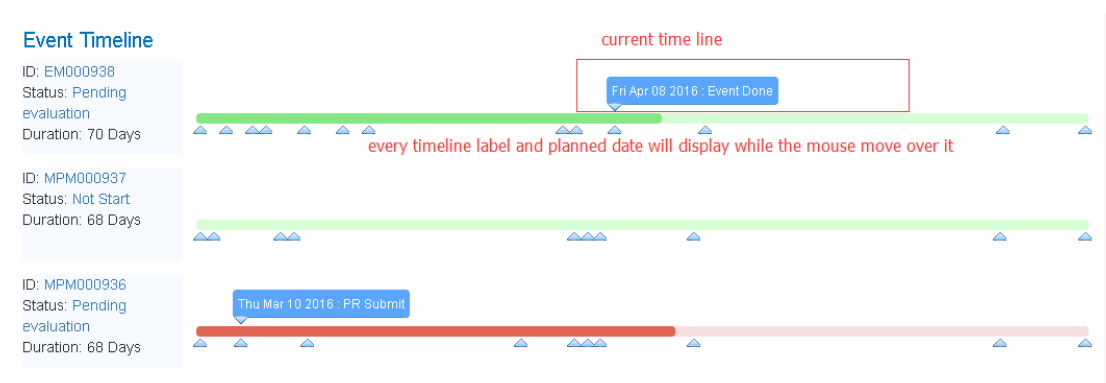

You can choose some columns if you only want to check few columns.

"Export Events" provide function to export event items to excel file

1.2.3 Event Time Line '

"Event Time Line" is a dashboard of event Timeline , it display time line status of event with "Red","Yellow","Green" and current timeline like below

2 Create Event Page

If you want to create an new event , you can click "create event" button to navigate to create event Page . There are 6 sections in the page: Event Basic Information, Vendors , time line , Expense Plan, HCP Invitation and Internal Attendee.

2.1 Event Basic Information

This section is input view of event basic information , the fields which has "*" in front of label is required . The gray fields will be created by system automatically. If owner department is "Others" you need to enter the customer department name. If Disease area is "Other" ,please enter customer Disease area. If product is "Others" , Customer Product should be entered . When Event Type is changed ,Even Level will refresh the list for selected Event Type. If Event Level is "Regional" ,please specify Event Level Work Space(eg."东区"),Meeting Hotel come from vendor item which "Is meeting Hotel" is "Yes" in Vendor List . The event basic information section like below picture:

2.2 Vendors

Vendors is a list view of event vendors , there are four default vendors when create event page loading. This is because there are four vendor type which each one need has a default item."Is Direct Pay" column is used to check whether the vendor is Direct Pay from Roche.If the column's value is "No" , customer "Vendor name" should be entered. "Is Meeting Hotel" column is check whether the vendor is event meeting if the "vendor type" is "hotel" , if the "Vendor type" is other items , this column's value is "No" and Read only, the column value is "Yes",   The "Vendor Name" of vendor will fill to "Meeting Hotel" field of "Event Basic Information" Section. Following picture show detail of vendors, as you see in this picture "Add New" button can help you to add a new vendor to vendor list, "delete" link always to remove vendor from list.

2.3 Timeline

   Time line function help us to manage event time line list , "Add New" button to add new time line, "Delete" is visible only the time line is add by user for there are 16 timelines items will be added when the create event page loading ,"Planned Date" column is used to set the plan date of time line ,"Priority" can help user to order time line list. All of planned date should be ordered ascending. The time line section shows below:

2.4 Expense Plan

Expense plan is used to record event budget plan, these fields which "*" letter in front of label is required . Other fields is option ,but system will check balance if some of other fields has value.

Expense Plan

* Event Total Budget:	123,456.98	Speaker Fee:	
Transportation -Air Ticket:	123,456.88	Accommodation:	
Transportation - Bus Ticket:		Venue Charges	
Transportation -Train Ticket:		Booth:	
Transportation - Car Rental(DIDI):		Meal:	
Transportation - Car Rental(None-DIDI):		Logistics Service Charge (e.g. service fee, tax):	
Registration Fee		Meeting package :	
Detail meeting package（e.g.coffee break，meal，venue rental）:			

2.5 HCP Invitation

HCP Invitation is used to record event hcp invitation plan, these fields which "*" letter in front of label is required . Other fields is option ,but system will check balance if some of other fields has value. HCP invitation group by Level and Hospital , Count of all level HCP need to equals with total HCP ,Target Hospital HCP must be equals with total HCP if these sub-items' value greater than 0

HCP Invitation

* Total HCP:	100	Target Hospital HCP:	100
A Level HCP:	20	Local HCP:	60
B Level HCP:	80	None-Local HCP:	40
C Level HCP:	0		
D Level HCP:	0		
Other Level HCP:	0		

2.6 Internal Attendee

Internal Attendee function help to plan the internal attendee count ,the count Internal Sales must be equals with total count of local sales and none local sales if these two sub-items' value greater than 0

Internal Attendee

* Total Internal Attendee:	100	Local Sales:	10
Internal Sales:	50	None Local Sales:	40

2.7 Submit Event Data

When you click "save" button , the new event will be added to the database and the page will navigate to edit page with event Id.

3 Event Edit Page

After we submit the new event data successfully , system will navigate to edit page with event Id by attach to URL . Event Edit Page has 6 sections as well as create event page ,but there are still some difference compared with create page.

3.1 Event Basic Information

As we see from the upper picture , compared with create page ,the fields "Event Type" ,"Event Level" ,"Event Start Time","Event End time" are disabled.

3.2 Vendors

According to the picture ,this function is same as Create Page

3.3 Time line

The fields "Actual Date" ,"Status","Comment" of timeline will be maintained in this page , Actual date must be ordered ascending. When the actual date is later than planned date in 7days status with yellow light , when the actual date is later than planned date out 7days ,status with red light, When the actual date is earlier than planned date, status with green light. "Comments" field is required if the timeline status is red light. When timeline "Kick-off Meeting" Actual Date is not null , the event status change to "On-going",when timeline "Event Done" Actual Date is not null the event status change to "Pending-Evanluation", when timeline "Performance Evidence Collection

Finished And Upload To TouchPoint" Actual Date is not null the event status change to "Completed"

3.4 Expense

In Expense Section of Edit page, we can maintain the Plan and Actual expense, system will check the balance if sub-items of plan or actual has value before the expense save to the database.

3.5 HCP Invitation

HCP Invitation is used to record event hcp invitation plan and Actual, these fields which"*" letter in front of label is required. Other fields is option, but system will check balance if some of other fields has value. HCP invitation group by Level and Hospital , Count of all level HCP need to equals with total HCP ,Target Hospital HCP must be equals with total HCP if these sub-items' value greater than 0

3.6 Internal Attendee

Internal Attendee function help to record the internal attendee count(planning and Actual) ,the count Internal Sales must be equals with total count of local sales and none local sales if these two sub-items' value greater than 0

Internal Attendee							
*Total Internal Attendee:	Plan 100	Actual 0		Local Sales:	Plan 10	Actual 0	
Internal Sales:	Plan 50	Actual 0		None Local Sales:	Plan 40	Actual 0	

4 Q&A