

Corporate Support Tracking

Corporate Support Tracking

User manual

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1 Introduction.

The purpose of the application of the administration and monitoring of the corporate support service provided to the countries is to have a communication channel between the country managers and the general corporate administration, in which to express the needs and concerns regarding the service provided. The application will allow countries to express various issues to be followed up, which will consist of:

- Determine the necessary actions to correct or meet the need raised
- Set commitment dates.
- Assign the actions to the corresponding leader of corporate services.

The application also makes it possible to obtain reports and dashboards for monitoring and reporting, allowing the analysis by several dimensions, such as, country, state, corporate manager, etc.

The communication is established through a system of requests, observations and actions, related to the request for follow-up of corporate support.

The recipients receive notifications of the application by email, which integrate a direct link that redirects them to the platform.

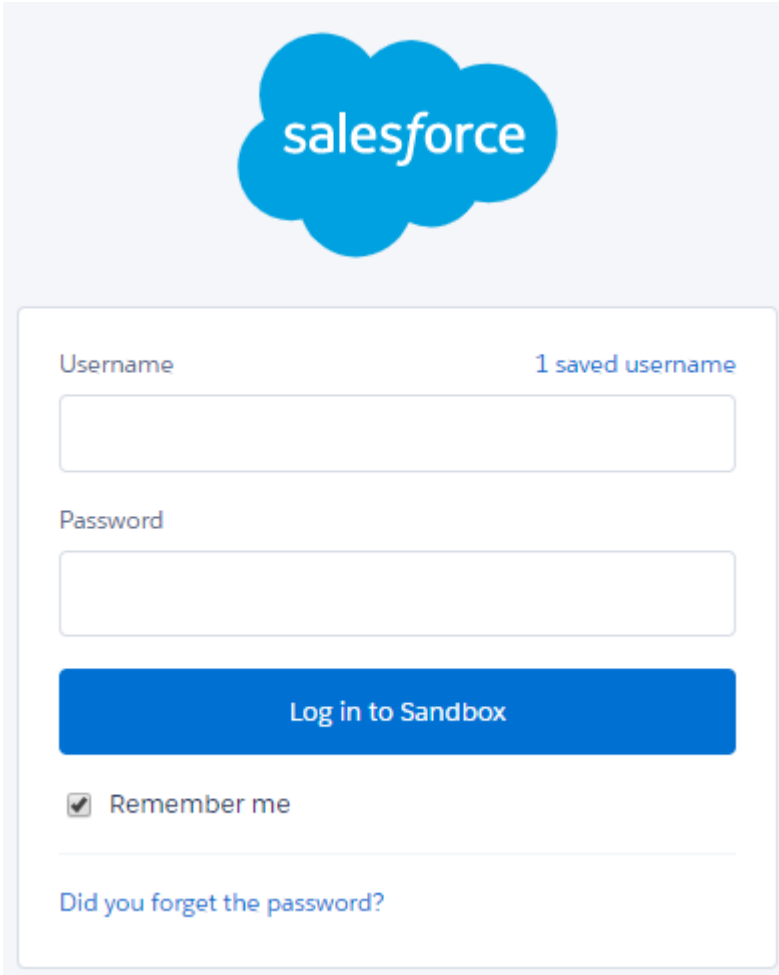
Next, it will describe step by step how it works and how we can make use of it.

2 Enter to the tool.

To start using the tool of Corporate Support Tracking, we must enter the following link:

<https://ayesaoci.lightning.force.com>

We visualize the portal of initiation, in which we will introduce our username and password.



The image shows the Salesforce login portal for a Sandbox environment. At the top, there is a blue cloud logo with the word "salesforce" in white. Below the logo, there is a white login box with a light blue border. Inside the box, the "Username" field is labeled "Username" and has a link "1 saved username" to its right. Below the username field is a "Password" field. A blue button labeled "Log in to Sandbox" is positioned below the password field. Below the button is a checkbox labeled "Remember me" which is checked. At the bottom of the login box, there is a link "Did you forget the password?".

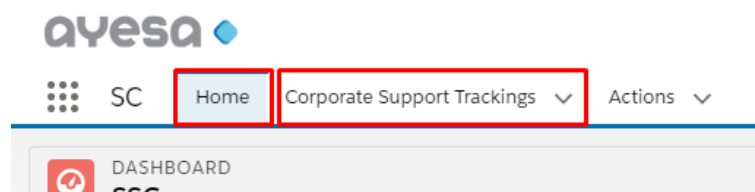
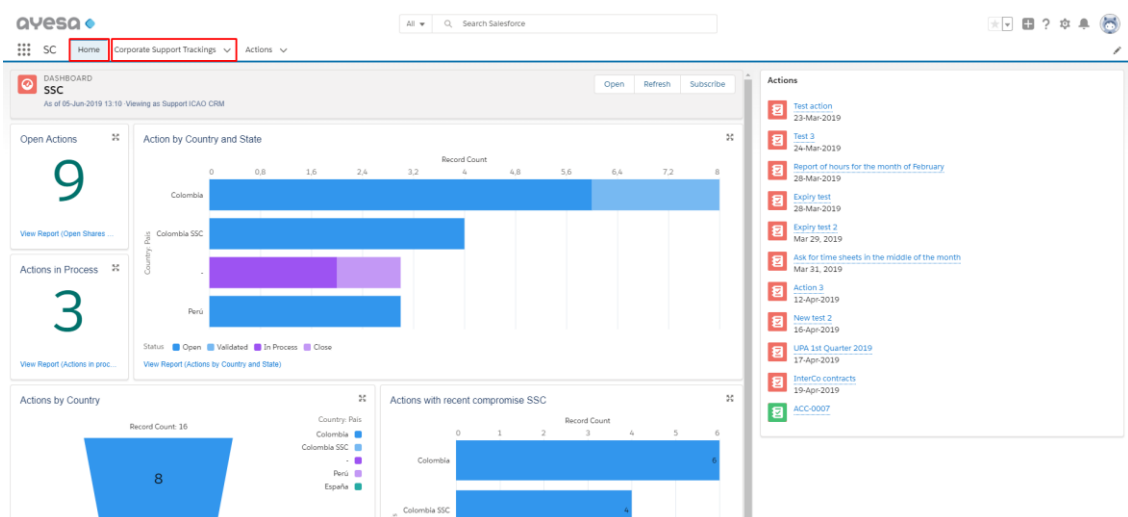
Once we have entered, we will see two tabs:

- Home
- Corporate Support Tracking

The default initial screen that will appear is the Home tab.

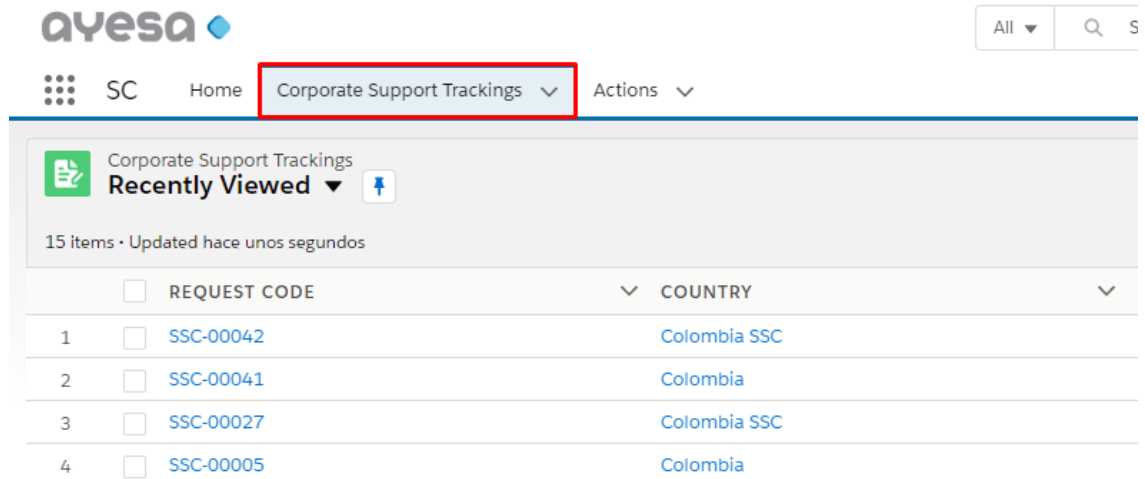
In this screen we see information corresponding to the requests and actions of each country.

We will explain this tab in detail later.



3 Corporate Support Tracking (SSC).

We will start with the Corporate Support Tracking tab.



	REQUEST CODE	COUNTRY
1	SSC-00042	Colombia SSC
2	SSC-00041	Colombia
3	SSC-00027	Colombia SSC
4	SSC-00005	Colombia


The communication system would begin with the creation of the Corporate Support Tracking Requests.

An application is a request directly related to a country. These requests can be created by those leader for the different countries or by the general corporate management.

In these request the country involved will be indicated and a brief description of the reason for its opening.

On the Corporate Support Tracking screen we can see the fields by which the request will be sorted:

1. **Request Code:** autonomous code by which the different request will be distinguished and ordered.
2. **Country:** country to which the request belongs.

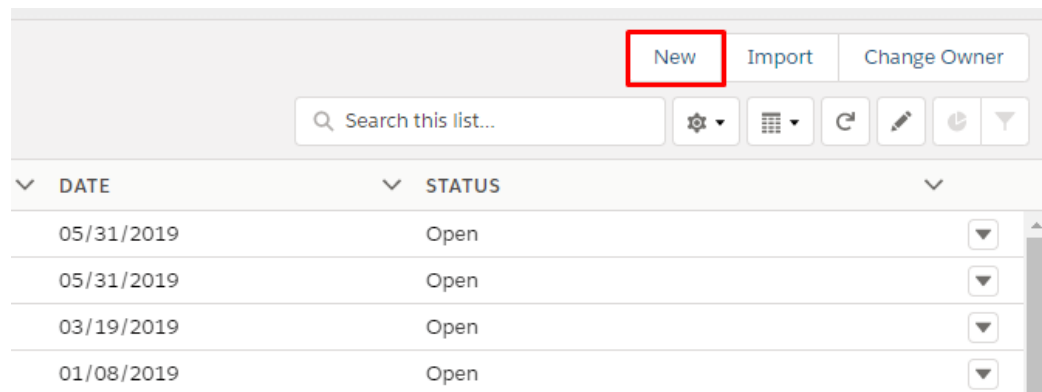
Corporate Support Trackings		
Recently Viewed ▼ 		
15 items • Updated hace unos segundos		
1. <input type="checkbox"/>	REQUEST CODE	2. ▼ COUNTRY
1 <input type="checkbox"/>	SSC-00042	Colombia SSC
2 <input type="checkbox"/>	SSC-00041	Colombia
3 <input type="checkbox"/>	SSC-00027	Colombia SSC
4 <input type="checkbox"/>	SSC-00005	Colombia

3. **Date:** date of creation of the request.
4. **Status:** state in which the request is located. The states can be:
 - a. Open
 - b. In Progress
 - c. Closed
 - d. Validated

3. ▼	DATE	4. ▼	STATUS
	05/31/2019		Open
	05/31/2019		Open
	03/19/2019		Open
	01/08/2019		Open

4 Creation of an SSC Request

With the button "NEW" we will create a request for Corporate Support Tracking.

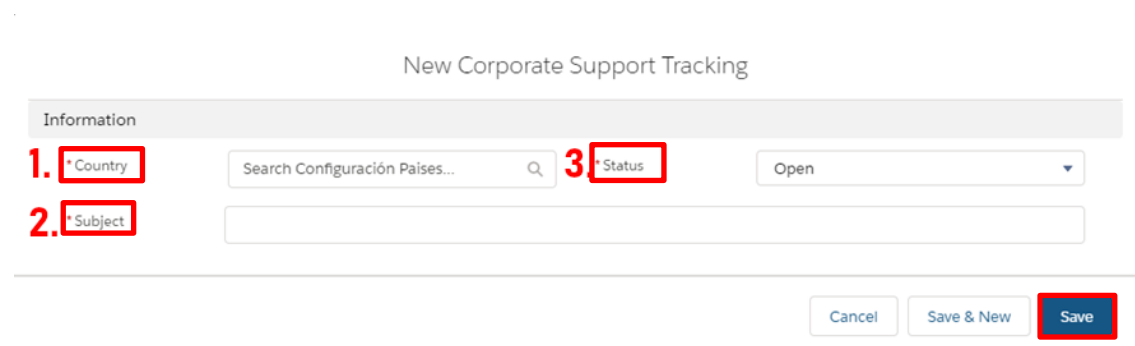


The screenshot shows a web interface for Corporate Support Tracking. At the top right, there are three buttons: "New" (highlighted with a red box), "Import", and "Change Owner". Below these buttons is a search bar labeled "Search this list..." and several icons for settings, view, refresh, edit, and filter. Below the search bar is a table with two columns: "DATE" and "STATUS". The table contains four rows of data, all with a status of "Open".

DATE	STATUS
05/31/2019	Open
05/31/2019	Open
03/19/2019	Open
01/08/2019	Open

Once we press, the Create request screen will appear.

1. **Country:** we introduce the country to which the request is addressed.
2. **Subject:** short description.
3. **Status:** the start status of a request will be by default "Open".



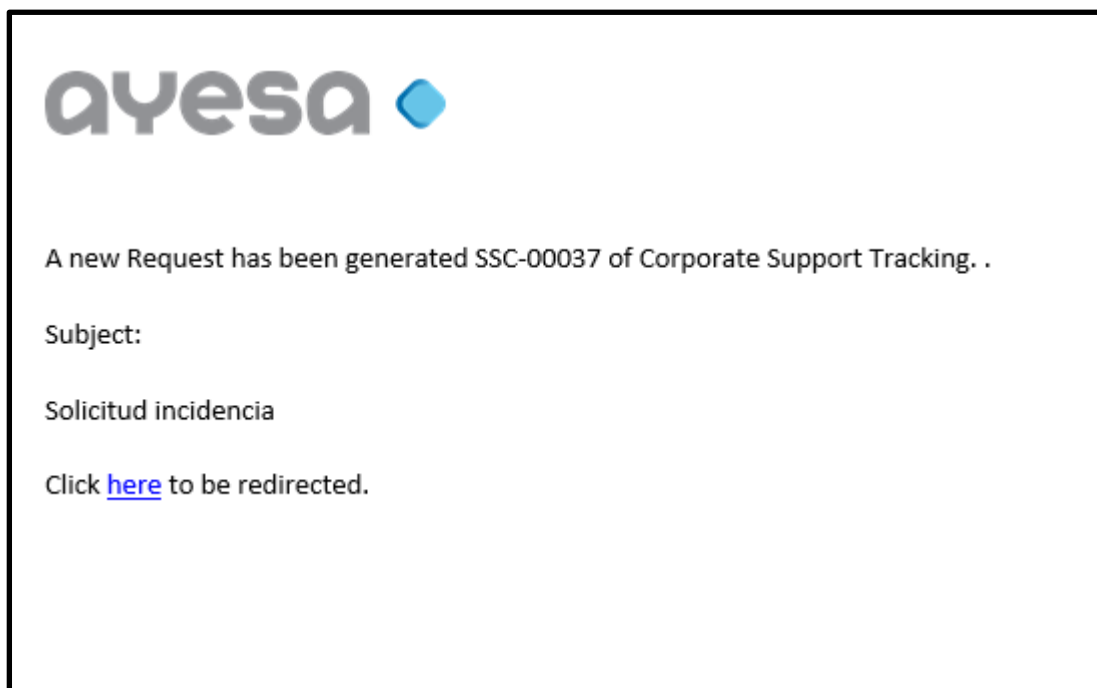
The screenshot shows the "New Corporate Support Tracking" form. It has a title "New Corporate Support Tracking" and a section "Information". Below this section are three fields: "Country" (labeled 1), "Subject" (labeled 2), and "Status" (labeled 3). The "Country" field has a search bar labeled "Search Configuración Países...". The "Status" field is a dropdown menu with "Open" selected. At the bottom right, there are three buttons: "Cancel", "Save & New", and "Save" (highlighted with a red box).

Completed the required fields and giving you to save, we will have created an request.

We can enter the requests with a single click in the "Request Code" that will be highlighted in the main screen of the tool.

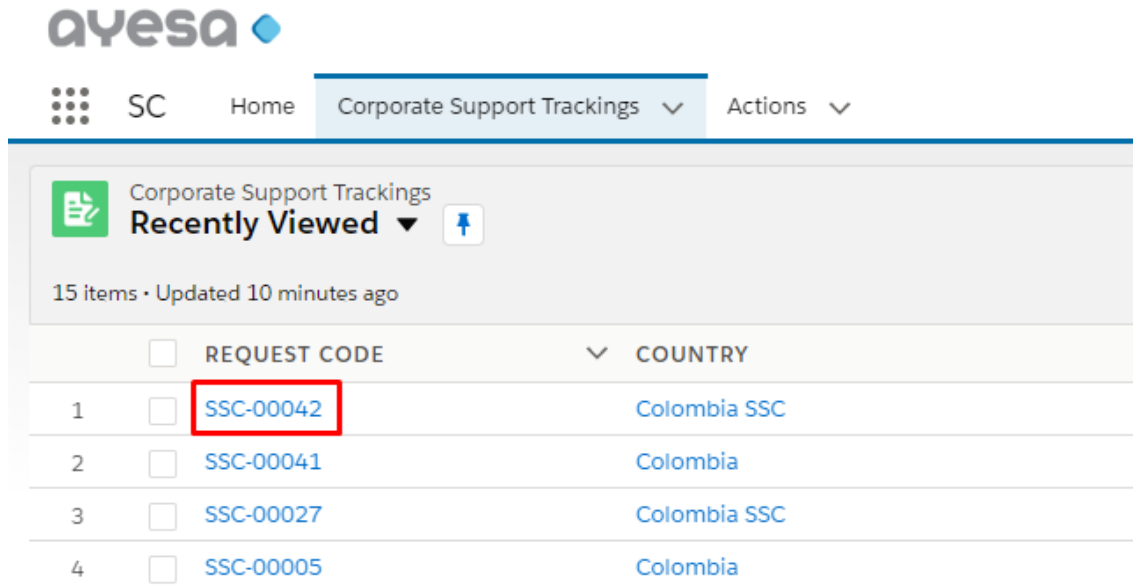
Once the request is created, a notice is automatically sent by mail to the recipient of said request.


The same will happen with the closing of an request, a notice will be sent by mail communicating the closing of said request.





5 Details of an SSC Request.

To enter a request we click on the code of the request.



ayesa 

SC Home Corporate Support Trackings Actions

Corporate Support Trackings
Recently Viewed  

15 items • Updated 10 minutes ago

	<input type="checkbox"/> REQUEST CODE	<input type="checkbox"/> COUNTRY
1	<input type="checkbox"/> SSC-00042	Colombia SSC
2	<input type="checkbox"/> SSC-00041	Colombia
3	<input type="checkbox"/> SSC-00027	Colombia SSC
4	<input type="checkbox"/> SSC-00005	Colombia

Within the request, we observe the following fields:

1. **Corporate Support Tracking:** Request code.
2. **Subject:** Request Name/Title.
3. **Country Manager:** Country Manager to whom the request is addressed.



Corporate Support Tracking
SSC-00042 **1.**

Subject
Solicitud de avales **2.**

Country Manager
 Soporte OAC... **3.**

Observations

 Observations (0)

> Action Plan

4. **Country:** country to which the request belongs.
5. **Date:** date of creation of the request.
6. **Status:** status in which the request is located. The status of a request will change depending on the state in which the Action are located. The worst state of the Actions it contains always prevails.

4.	Country Colombia SSC	5.	Date 31/05/2019	6.	Status Open
----	-------------------------	----	--------------------	----	----------------

7. **Observations:** list of Observations contained in the request.
8. **Action Plan:** listing of the Actions that the request contains.

- 7. Observations
 - Observations (0)
- 8. Action Plan

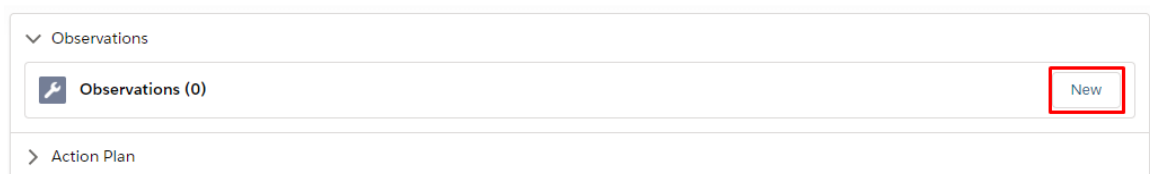
6 Observations.

The observations are notes within the requests. They can be created by the general corporate management, such as Country Managers.

They outline the needs, concerns and incidences of the country.

These observations, once created, are accompanied by an automatic notification in the form of an email addressed to the recipient of the observation.

To "Create" an observation, click on "New" in the observations tab.



The screen will appear with the fields required for the creation of an Observation

1. **Observation:** title/name to be granted o the Observation.
2. **Description:** descriptive texto of the Observation.
3. **Request:** request to which the Observation belongs. It is not modifiable.

When an observation is created, a notice is automatically sent by mail to the recipient of the observation.


New Observation

* Observation **1.**

* Description **2.**

Request **3.**

SSC-00042 ×



A new Observation has been generated: "Prueba observacion 2" of the task of Corporate Support Tracking. .

Description:

Prueba para alerta de correo

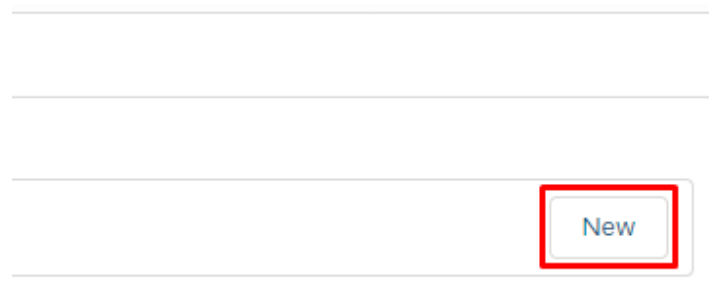
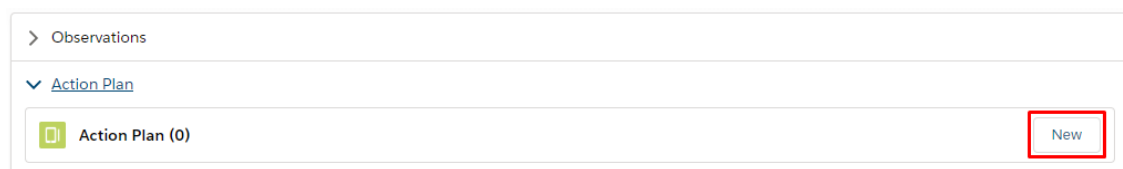
Click [here](#) to be redirected.

7 Creation of Actions.

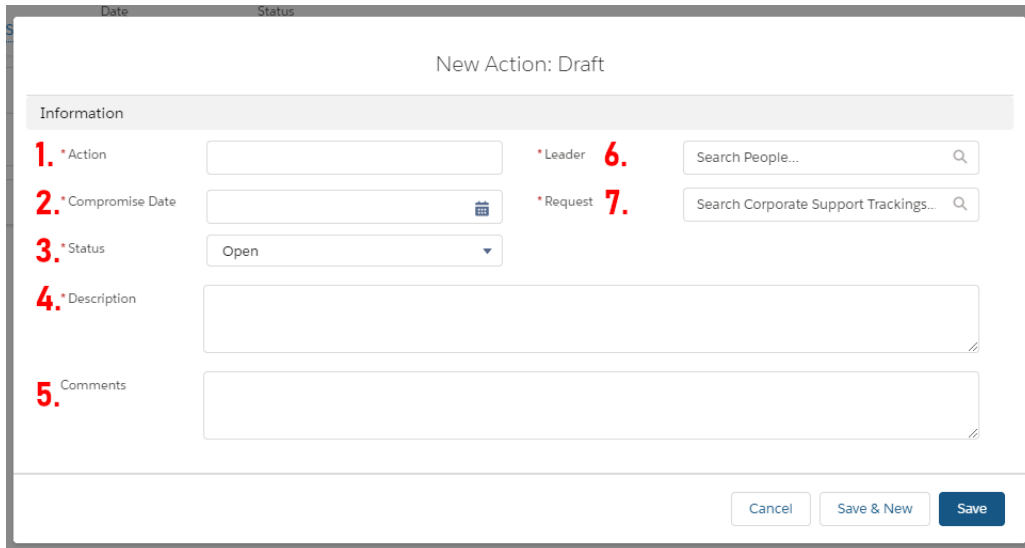
The actions are the activities that have to be carried out as a result of an request and the observations it contains.

The actions can only be created / modified by the general corporate management, so that every action has a commitment date established.

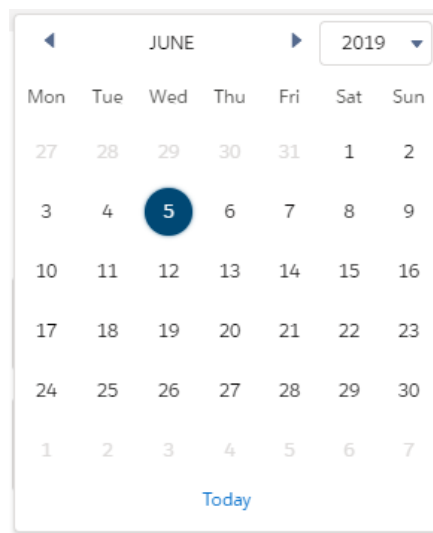
To "Create" an action, click on the "New" button in the Action Plan tab.



In the action creation screen we will find the following fields:



1. **Action:** Action name/title .
2. **Compromise Date:** deadline to complete the action.



3. **Status:** state in which the action is. By default, it is created in the "Open" state.
4. **Description:** descriptive text of the action.
5. **Comments:** additional informative text to the description.
6. **Leader:** person responsible for carrying out the action.
7. **Request:** request to which the action belongs.

Once the action is saved, it will appear in the "Action Plan" tray.

> Observations

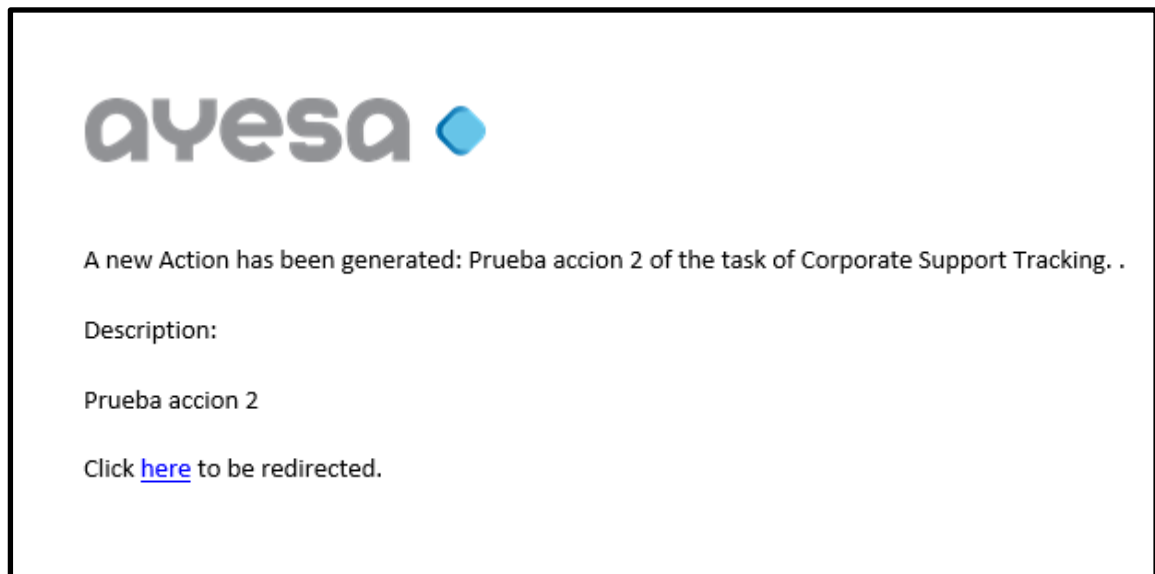
< Action Plan

Action Plan (1)


New

ACTION	LEADER	STATUS	COMPROMISE DATE
Pedir las hojas de horas a mita...	Soporte OACI CRM	Open	31/03/2019
<div>View All</div>			


As it happened with the requests and the observations, when creating an action, an email notification will be sent to the person leader for the action.



We can enter to visualize the action doing click in the name of this one.

> Observations			
▼ Action Plan			
<div>  Action Plan (1) </div>			New
ACTION	LEADER	STATUS	COMPROMISE DATE
Pedir las hojas de horas a mita...	Soporte OACI CRM	Open	31/03/2019
View All			

Inside, we will find the information that contains the action, the documents linked to it and the history of modifications of the action, indicating the field that has been modified, the user and date of modification, previous value and the new one.

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All ▼

Search Salesforce

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SC

Home

Corporate Support Trackings ▼

Actions ▼


 Action

Pedir las hojas de horas a mitad de mes


Edit

▼ Information

Action	Pedir las hojas de horas a mitad de mes	Leader	Soporte OACI CRM
Compromise Date	31/03/2019	Request	SSC-00025
Status	Open		
Description	Los RP deben enviar a Control las hojas de horas de cada mes a partir del día 15		
Comments			

 Documents (0)

New

 Action History (1)

DATE	FIELD	USER	ORIGINAL VALUE	NEW VALUE
18/03/2019 17:24	Created.	Dirección SSC		

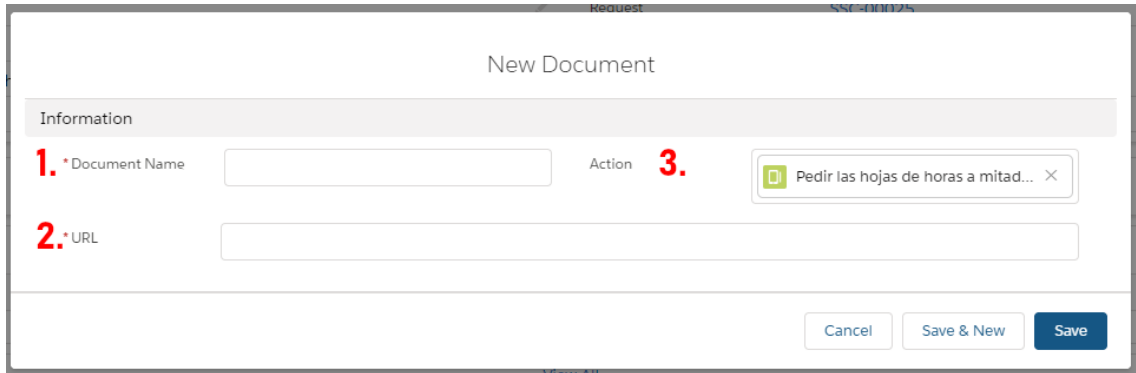
View All

To link a document, click on "New" in the document section.

 Documents (0)

New

Here we will name the document and the URL to access it.



1. **Document Name:** in this field we put the name that we want to the document that is going to link.
2. **URL:** link where the document is located. Important field if we want that by clicking on the name of the document, this redirects us directly to the document or repository where it is located.
3. **Action:** subject of the action to which the document to be linked belongs.

In the Actions history section, all the changes that have been made in an action are archived:

- Creation of the action.
- Status change.
- Modifications of fields.
- Add files.

7.1 Possible evolutions of the Action states

The actions can have different states as the events that comprise it take place. By default, an action when created, its status will be "Open".

The person assigned to the action has the ability to modify the status of the action, which can evolve as follows:

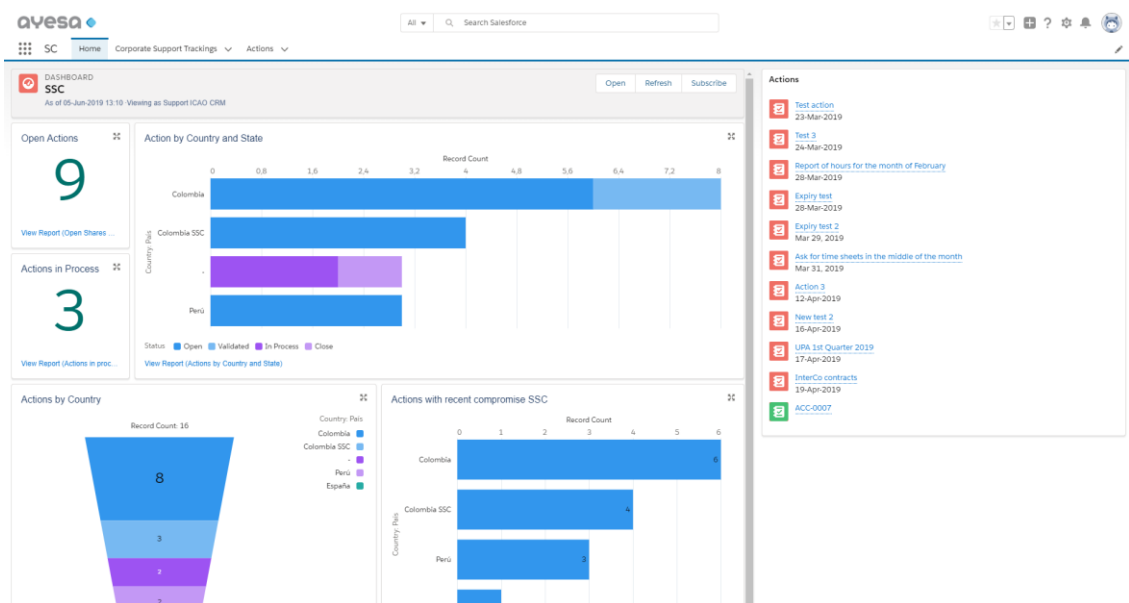
Who can change it	State of origin	Possible state
Leader for the action	- Open	<ul style="list-style-type: none"> - In Process - Closed - Canceled
Leader for the action	- In Process	<ul style="list-style-type: none"> - Open - Closed - Canceled
Leader for the action	- Closed	<ul style="list-style-type: none"> - Open - In Process - Canceled
Corporate General Management	<ul style="list-style-type: none"> - Open - In Process - Closed 	<ul style="list-style-type: none"> - Open - In Process - Closed - Validated - Canceled

Note: An action in the "Validated" or "Canceled" status can not be modified.

8 Reports.

Apart from what has already been explained, we have another tab besides the Corporate Support Tracking. This is the "Home" tab.

In this tab we can visualize the information of the tool in a direct and intuitive way.



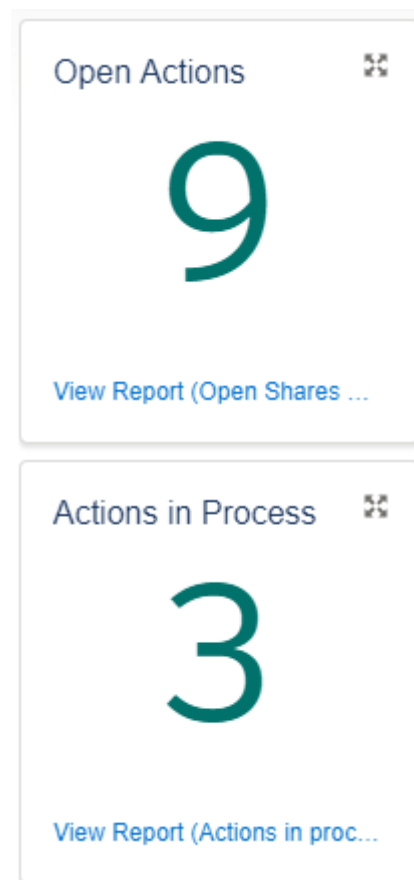
The reports have been divided according to the role of the user who viewed it:

- Corporate general management
- Country Managers and corporate managers

8.1 Reports for Corporate General Direction.

8.1.1 "Open", "In Process" and "Closed" Actions.

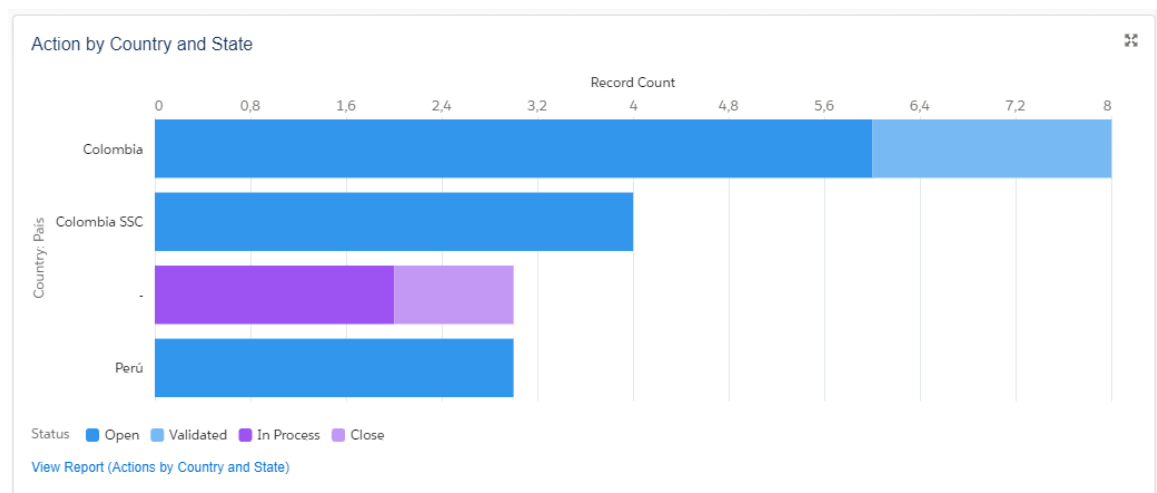
These KPIs show the total of the Actions that are in the "Open", "In Progress" and "Closed" status.



8.1.1.2 Actions by Country and State.

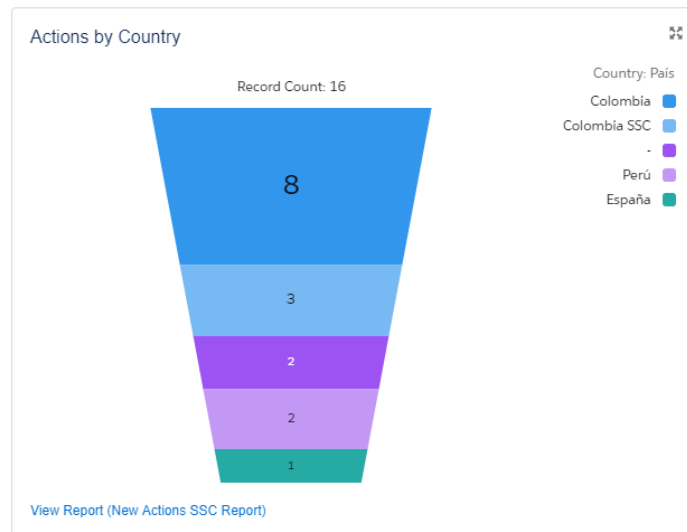
The total of the Actions of each Country are shown, establishing a range of colors according to the status of their Actions:

- Blue = Open
- Light blue= In Process
- Purple = Closed
- Violet = Validated
-



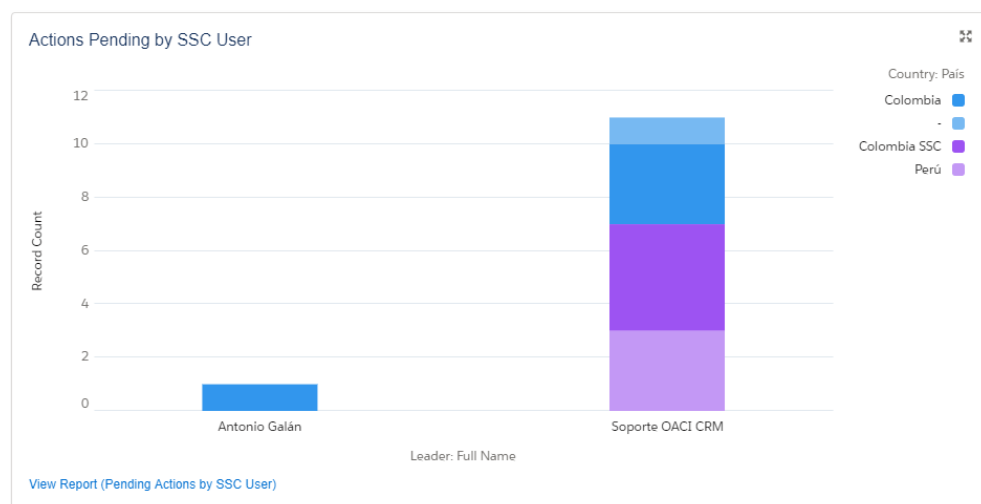
8.1.3 Actions by Country.

KPI that shows the total of the actions that each country contains.



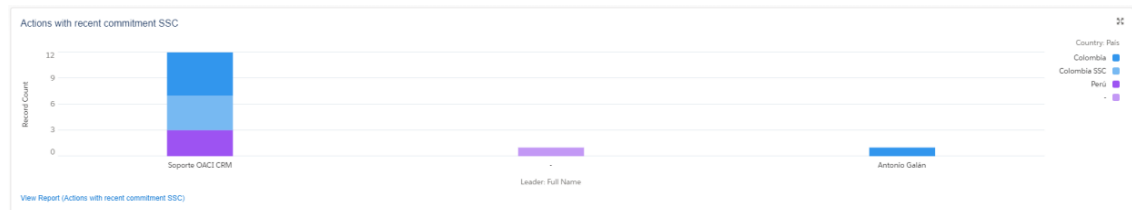
8.1.4 Opened Actions by User.

Shows the total of open actions organized by user



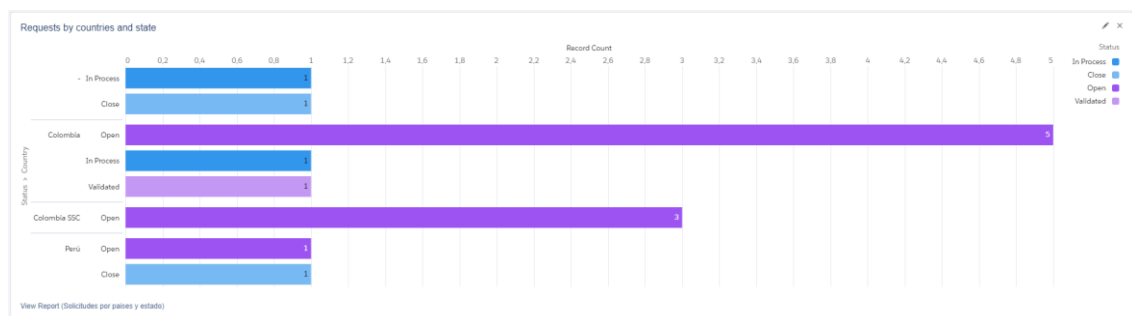
8.1.5 Actions with recent SSC compromise.

It informs us of the actions that have the due date less than or equal to 7 days.



8.1.6 Request by Country and State.












Classify countries by resquest and their status.



8.1.7 Actions by expiration.

Displays the Actions in the order of their closing date. Thus, the actions that appear in the first place will be those that have the lower closing date. In addition, the color of the action will change depending on the date of the same, following the following hierarchy of colors:

- Red = Open actions whose date has expired.
- Yellow = There are 1 to 7 days left for the action to expire.
- Green = There are more than 7 days for the action to expire.

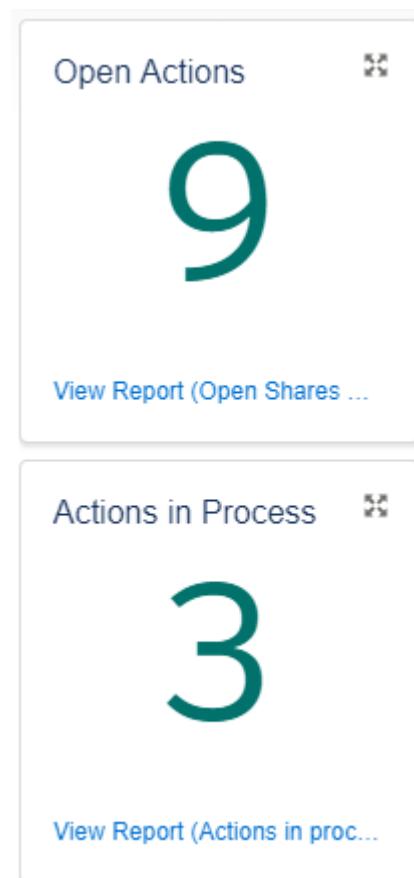
Actions	
	Test action 23-Mar-2019
	Test 3 24-Mar-2019
	Report of hours for the month of February 28-Mar-2019
	Expiry test 28-Mar-2019
	Expiry test 2 Mar 29, 2019
	Ask for time sheets in the middle of the month Mar 31, 2019
	Action 3 12-Apr-2019
	New test 2 16-Apr-2019
	UPA 1st Quarter 2019 17-Apr-2019
	InterCo contracts 19-Apr-2019
	ACC-0007

8.2 Reports for Country Managers and Corporate Managers.

8.2.1 "Open", "In Progress" and "Closed" Actions.

These KPIs show the total of the Actions that are in the "Open", "In Progress" and "Closed" status.

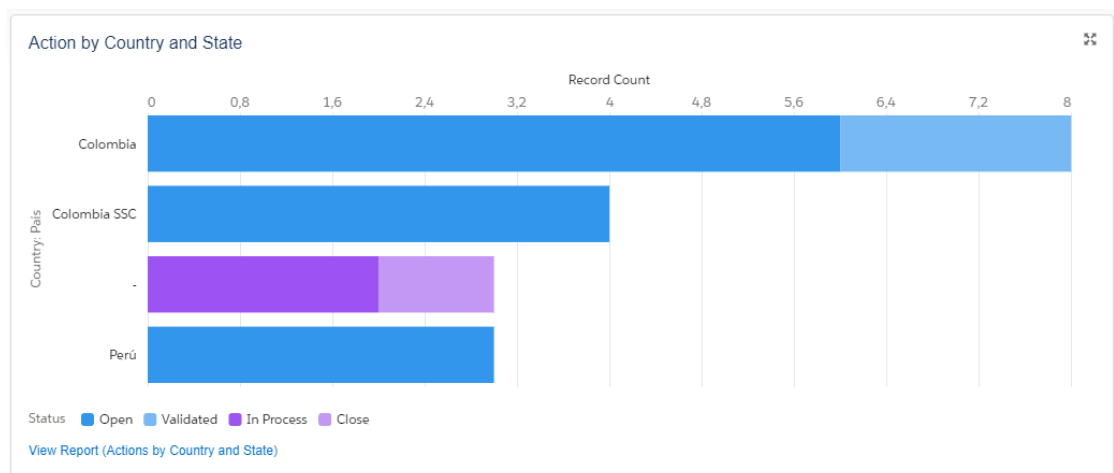
It has been configured with a color hierarchy:



8.2.2 Actions by Country and State.

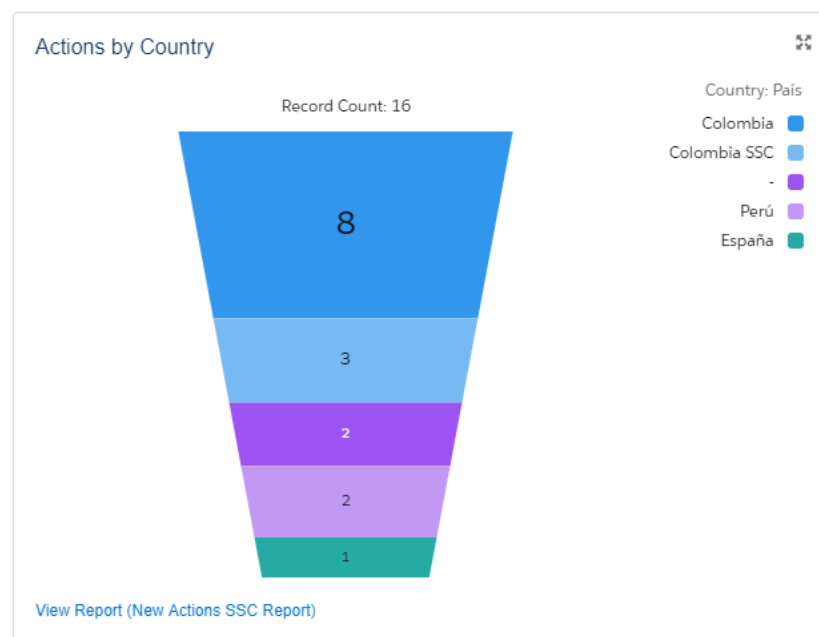
It shows the total of the Actions of each Country, establishing a range of colors according to the status of its Actions:

- Blue = Open
- Light blue= In Progress
- Purple = Closed
- Violet = Validated



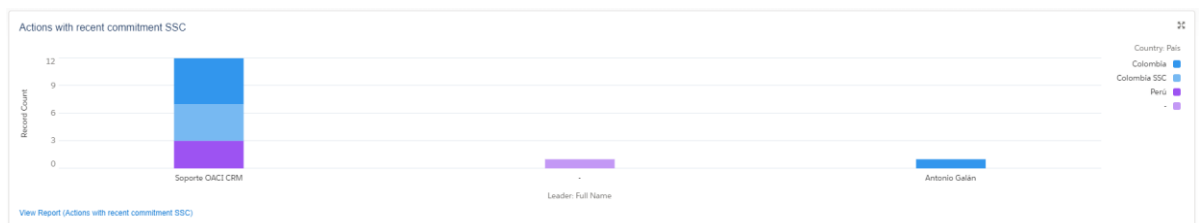
8.2.3 Actions by Country.

KPI that shows the total of the actions that each country contains. Users will see their actions grouped by country. In the case of Country Managers, they will only see those from their country.



8.2.4 Actions with recent SSC compromise.












It informs us of the actions that have the due date less than or equal to 7 days. Like Country Actions, Country Managers will only see those from their country.



8.2.5 Actions by expiration.

Displays the Actions in the order of their closing date. Thus, the actions that appear in the first place will be those that have the lower closing date. In addition, the color of the action will change depending on the date of the same, following the following hierarchy of colors:

- Red = Open Actions whose date has expired.
- Yellow = There are 1 to 7 days left for the action to expire.
- Green = There are more than 7 days left until the action expires.

Actions	
	Test action 23-Mar-2019
	Test 3 24-Mar-2019
	Report of hours for the month of February 28-Mar-2019
	Expiry test 28-Mar-2019
	Expiry test 2 Mar 29, 2019
	Ask for time sheets in the middle of the month Mar 31, 2019
	Action 3 12-Apr-2019
	New test 2 16-Apr-2019
	UPA 1st Quarter 2019 17-Apr-2019
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	ACC-0007