priority

Management Tools Script

Clip Link: http://www.eshbel.com/Movie_Search/Management_Tools_Clip.htm

Note: Yellow highlights indicate action instructions.

Introduction (00:00-00:30)

Priority provides a variety of tools for managers to maintain control over business processes and to keep tabs on all organizational activities. In this video clip, we'll mostly be emphasizing the ability to follow up on various activities and see them through until their execution, and analysis tools for evaluating performance.

Priority tools that are content-specific to certain topics, such as financials, purchasing and CRM, are covered separately elsewhere.

Tracking a Document (00:31-01:57)

Let's begin our demonstration with an open Price Quotation. We'll be following up on this document, and on the users who deal with it. In the **Follow-up** tab, you can see the quote status and the user assigned to it. The quote has been sent to the customer, and, at this point, we want to track the document to see if the quote generates a sale. To do so, simply click the flag adjacent to the form name. The flag color changes accordingly from grey to green – indicating that I am tracking it at the moment. Note that tracking is individual; each user decides for him or herself whether to track a specific record, and one person's definition of tracking does not affect another's.

Once you have flagged a document for tracking, you will receive an e-mail notification whenever its status or assigned user changes. To stop tracking it, simply click on the flag again; it will revert back to grey.

You can see that the options for tracking and stopping are also available from the upper **Mail** menu. Slightly above them, select **Tracking List** to open a list of all the documents you flagged for tracking. Note that documents appear in the **Tracking List** regardless of their status; that is, even inactive documents will appear here so long as they are still flagged for tracking. Press **F6** on any **Document Number** to access that record in full and modify it as needed.

Employee Collaboration (01:58-02:51)

Let's take a moment to view the possibilities for collaboration between several employees who work together on the same task.

The **Notes** sub-level form is used for a dialogue between the company employees regarding the task at hand. You can scroll through and read earlier comments, access links directly from the text, and add insights of your own. Pressing **Ctrl+O** will create an e-mail message to the other participants of the task, and the text from the **Notes** sub-level will be copied into the e-mail. For more details on sharing information in **Priority**, see our collaboration clip.

To Do List (02:52-04:53)

Another useful feature for keeping track of assignments is the **To Do List**, accessible by clicking a button in the tool tray at the bottom left corner of your screen. Note that this form is unique, in the sense that it allows you to make changes to several types of documents directly within the form, even though it contains a "mixture" of different types of data and documents.

Usually, users use the list to see all the active documents assigned to their name. However, managers can retrieve the lists of other employees, to receive an overview of their workload and help them prioritize their different assignments. For example, let's retrieve by **Assigned To**=Cheryl, to see all her different tasks.

The **To Do List** displays all the documents that have an active status and are assigned to Cheryl; and will include all types of documents for which a BPM Flow Chart can be defined. In **Priority**, this includes a vast range of documents: sales orders, quotes and opportunities; tasks; service calls, project activities, financial documents, shipping documents and many more.

In the Details column, you can see a short description of each activity

Cheryl has many documents under her care that are assigned a priority of 2 so let's rearrange them a bit, giving the most important one a **Priority** of 1, and a lower priority to the rest. When Cheryl retrieves her own **To Do List**, she can set up the form to automatically sort by **Priority**, and set to work on the tasks by their urgency, in a descending order.

You can also indicate the number of hours to be spent on each activity in the **Planned Hours** column, for example, if these activities are budgeted by work hours. Additional details can be revised directly within the form: statuses, assigned users and so on.

Note that here, too, you can flag any document for tracking, or stop tracking a document.

To-Do List History (04:54-06:16)

Next, let's open the **To Do List History** form. The difference between this form and the regular to-do list is that here you can see multiple lines for a single document: one for every major change made to the document. Another important difference is that the history form displays documents that are no longer active. Effectively, this means that using the right query, you can see the progress of a single document at a glance. For example, let's retrieve the history of a single document. Note the changes in the document status and assigned user.

Another useful option is to perform a query using the **Time Stamp** column, which updates the date and time that the document was changed. Let's demonstrate by retrieving all the documents altered in the past month. Use the question mark "?" and asterisk "*" characters to denote a date range. You can combine any number of columns in the query: for example, you can retrieve all documents **Opened by** a certain user this month, or of a certain status, or any other combination of your choice.

However, you may also want to catch those documents that *haven't* changed over a period of time, to inquire as to why they are stuck and help move things forward. The most useful tool in this case is the **Business Process Management** flowchart, or BPM.

Business Process Management – BPM (06:17-08:07)

Let's demonstrate using the flow chart for tasks. The flow chart consists of possible task statuses, and the allowed paths between them. A detailed demonstration of setting up the BPM chart is presented in a separate clip. Right now, let's just right-click on the "Active" status and select **Rules** to see the options available here. Since we want to set up a rule that notifies us when tasks remain "stuck" for more than a week, we'll select the second option: "When the document remains in this status longer than", then record 1, and select "weeks".

In the second pane, we'll define the action that happens: Send e-mail, to user, and select that user. The following fields are used for defining the message itself, which can contain a code such as the number of the task, which will appear in the mail message as a clickable field, leading you directly to the task record within ***Priority***.

Lastly, you can limit this rule to certain conditions: for example If the value of **Cust. Group Code** is equal to VIP.

As you may have noticed, the BPM rules allow for a great deal of flexibility: you can send an SMS rather than an e-mail, or change the assigned user. You can create a personalized e-mail message and even attach a printout of the document. And you can limit the rule triggers using an endless amount of combinations between columns and functions.

The BPM flow chart is the main tool that ensures that documents are dealt with speedily, that none of them are neglected, and that customer satisfaction remains high.

Metrics and Reports (08:08-11:10)

In the last part of this clip, I'll display a few types of executive reports. Managers that work with ***Priority*** regularly work with a large variety of reports, of different types: built-in reports, BI reports, dashboards, and customized reports which you can build for yourself, using the various report generators. Dashboards are available from the **Executive Reports** menu.

Let's open the **Executive Dashboard** to receive an overview of several performance metrics. Some of the web parts displayed contain financial data, but clicking on the pencil icon shows you the entire list of available types of data. For example, simply drag the **Service Calls Requiring Attn** web part from the "hidden" area to the "positioning" one to add them to your display.

Many of the dashboard web parts can serve as drillable BI reports, used for filtering, grouping and sorting calls by technician, status, malfunction code, and much more. This enables extrapolation of complex data such as: which technicians are the most – or the least – productive, which customers typically use the most resources and what are some of the most common types of issues reported.

Note the **Key Performance Indicators** web part, which allows you to compare fundamental data for different periods directly from within the dashboard. Simply select the type of data and period and the data is displayed clearly in a single line, including the percent of change.

The **Executive Dashboard** is just one example; you can use the **Executive Reports** menu to produce many types of dashboards with relevant data analyses.
You can also utilize built-in reports, such as the **Service Time for Calls** report, to keep tabs on service metrics, such as the total number of service calls handled each month for a particular customer or by a particular technician, the number of work hours expended each month and the average number of hours spent per call. Such reports are available in all our modules: Financials, CRM, Sales, Inventory and so on.
We've surveyed a number of built-in management tools in ***Priority***: from managing assignments and tasks and seeing them through; through defining BPM flow charts and their rules; and finally analyzing performance using a variety of reports. Of course, this is merely a short overview: ***Priority*** offers tools for project management, managing the sales and purchasing pipeline, inventory management including a warehouse management system; and much more. For more information, you are welcome to watch our videos, and of course to contact us at www.eshbel.com.

Related Documentation

- Collaboration clip
- BPM clip
- Business Intelligence clip
- Document Management clip
- Privilege Explorer Wizard
- Data Authorization Wizard