

SERVICE QUALITY INSTITUTE

BAD Software

User's Manual

Fisis Consultores

6/11/2013




This document contains the instructions to use the BAD Software for registration and tracking of the ideas collected along the BAD IDEA Campaigns.



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Accessing the System

In your Internet Explorer enter:

http://sqi.servicequality.com/bad_campaign/en/client

Note: If your system doesn't have **Silverlight** installed, you'll be asked to allow to install it. You must allow it to be installed in order the system can works.

- Enter your **User Name** and **Password** (check them with your Company's or Location's Coordinator)




1.- Log in screen

Menus & Functions

These are visible or not depending on user's permissions. As follows:

- **Home** – This menu is shown to anyone. Shows the Company's name to which the user is allowed to access. For Company Coordinators it is possible to choose a company from the dropdown list, in case there are several companies registered.
 - The screen will show the Company's name, the user's location and the Logo of the select company.
- **Administration** – This menu is shown when the user is a Security Administrator. It allows create an maintain users profiles.
- **Configuration** – This menu is shown to users with roles of *Company Coordinator* and *Location Coordinator*. It allows to configure Companies:


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- Create and Edit companies' basic information, as:
 - Company's name,
 - Campaign Start Date,
 - Total number of employees.
- Register or import the list of locations for each company.
- Register or import the list of users whom will use the system (coordinators).
- Register the list of Work Teams for the campaign and their team members.
- **Ideas** - This menu has two functions:
 - **Company Ideas.** Shows all the ideas registered for the company and allows to lookup them for several criteria (Week of presentation, Category, Team, Location and Type of Idea). It is possible to Register New Ideas from this screen as well to Edit an existing one.
 - **New Idea.** Use this screen to Register New Ideas directly without going thru the previous lookup screen.

Note: Register or Edit ideas functions are not allowed to Team Leaders.
- **Charts & Reports** – Shows summary information of the Campaign in different views:
 - By Level Participation by Location and Teams,
 - By Categories,
 - By Locations,
 - By Teams,
 - By Week.

Each view presents data and graphs which can be printed out or exported to several formats.

Also, views can be filtered by Week of presentation of ideas.

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Functions Description

HOME

Home



BAD Software

TEST USER | [Change Password](#)

HOME ADMINISTRATION CONFIGURATION IDEAS CHARTS & REPORTS



FISIS CONSULTORES
▼

MEXICO




fisis

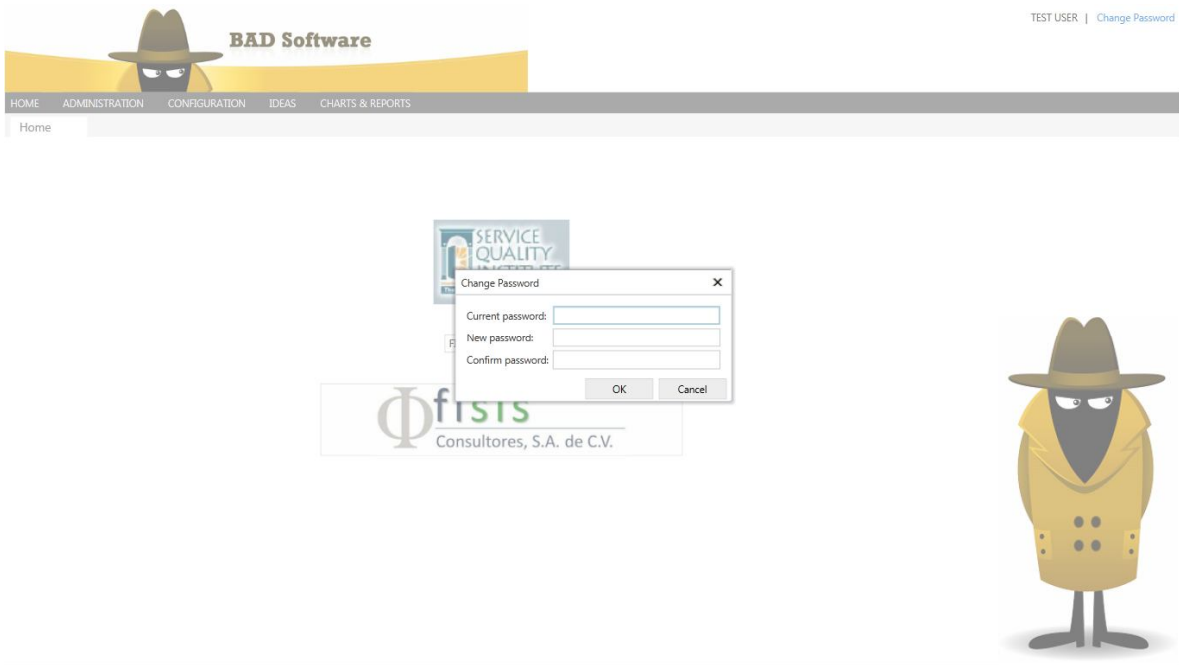
Consultores, S.A. de C.V.



2.- Home Page & Menus


Note: you can change your password anytime by clicking in the upper right link and entering the current password and the new one twice. The change will take effect the next time you log in into the system.

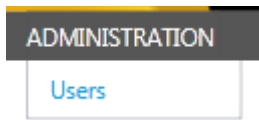
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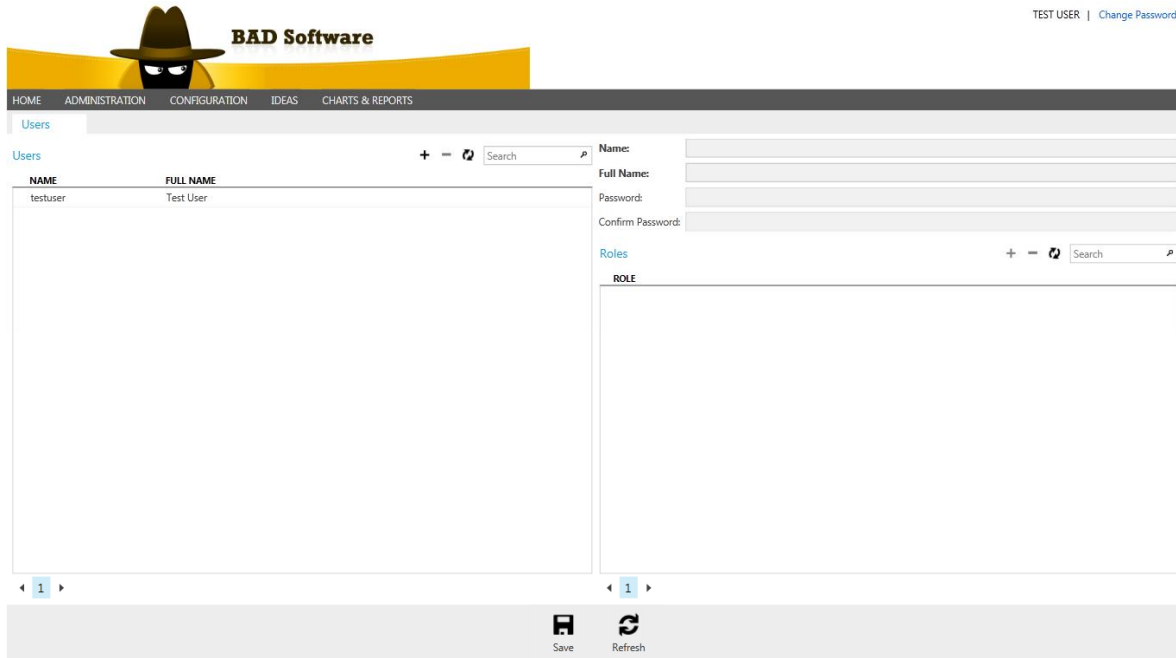
The screenshot displays the BAD Software web application interface. At the top left, there is a logo for Service Quality Institute and the text "BAD Software". The top right corner shows the user "TEST USER" and a "Change Password" link. A navigation menu includes "HOME", "ADMINISTRATION", "CONFIGURATION", "IDEAS", and "CHARTS & REPORTS". The "Home" page is selected. In the center, a "Change Password" dialog box is open, featuring three input fields for "Current password:", "New password:", and "Confirm password:", along with "OK" and "Cancel" buttons. The background shows a stylized cartoon character in a yellow trench coat and hat, and a logo for "Φfisis Consultores, S.A. de C.V.".

3.- Change Password screen

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This function is intended for Security Administrators. When selected it shows the following screen:



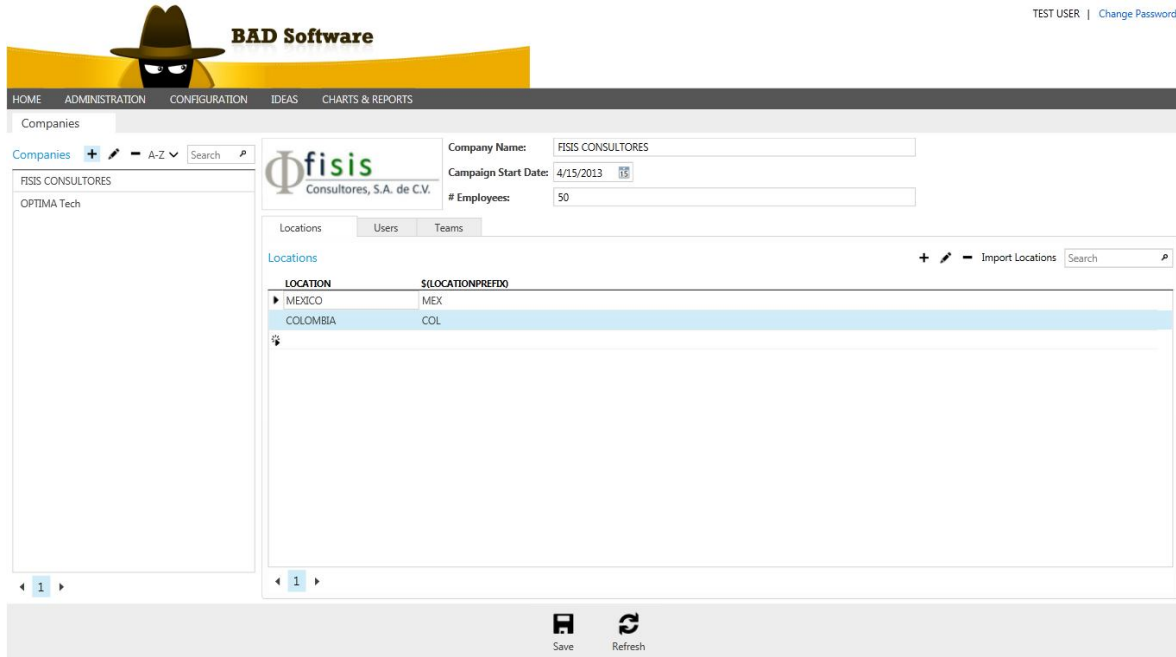
- The left panel presents the list of all registered users. You can add or edit any of them. The user's information appears on the right top panel. Password is not shown, but you can enter a new password and confirm it.
- The bottom right panel shows the roles on which the select user is subscribed to. You can add, edit or delete roles for users.

Note: Users of companies are registered on the Configuration Menu. If there is further necessary to change some login information (role, password or so) it must be done by the Security Administrator in this screen.

CONFIGURATION

Companies

This function allows create and edit companies' information. **Company Coordinators** and **Location Coordinators** can access it. The following screen is presented when clicked:



BAD Software TEST USER | [Change Password](#)

HOME ADMINISTRATION CONFIGURATION IDEAS CHARTS & REPORTS

Companies

Companies + - A-Z Search

FISIS CONSULTORES
OPTIMA Tech

fisis Consultores, S.A. de C.V.

Company Name: FISIS CONSULTORES
Campaign Start Date: 4/15/2013 15
Employees: 50


Locations Users Teams

Locations + - Import Locations Search

LOCATION	S(LOCATIONPREFIX)
MEXICO	MEX
COLOMBIA	COL

Save Refresh

Company's Location Tab



TEST USER | [Change Password](#)


HOME ADMINISTRATION CONFIGURATION IDEAS CHARTS & REPORTS

Companies

Companies + - A-Z Search

FISIS CONSULTORES

OPTIMA Tech



Consultores, S.A. de C.V.

Company Name: FISIS CONSULTORES

Campaign Start Date: 4/15/2013

Employees: 50


Locations Users Teams

Users + - Import Users Search

USER NAME	USER FULL NAME	USER ROLE	USER LOCATION
testuser	Test User	Company Coordinator	MEXICO

Save Refresh

Company's Users Tab



TEST USER | [Change Password](#)


HOME ADMINISTRATION CONFIGURATION IDEAS CHARTS & REPORTS

Home Companies

Companies + - A-Z Search

FISIS CONSULTORES

OPTIMA Tech



Consultores, S.A. de C.V.

Company Name: FISIS CONSULTORES

Campaign Start Date: 4/15/2013

Employees: 50

Locations Users Teams


Teams + - Search Company Team Members + - Import Members Search

TEAM	TEAM LEADER	EMPLOYEE NAME
Personnel	testuser	Fisis1
Production	testuser	Fisis2


Save Refresh

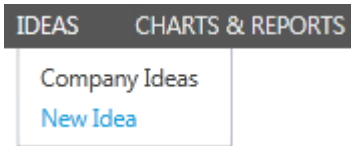
Company's Teams Tab

- The left panel shows the list of existing companies. You can add a new one by clicking the add button on top. Enter the requested information and save it.

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- **The Company's Logo can be uploaded by clicking the green arrow on the correspondent frame and specifying the path to the Logo's image.**
- Right bottom panel presents three tabs for each company:
 - **Location Tab:** Enter all locations for the company. Each location **must** have a Prefix which will be used to identify the ideas registered for that location. To import a list of locations see Appendix A.
 - **Users Tab:** Enter User Name, Full Name, Role and Location for each user. To import a list of users see Appendix A.
 - **Teams Tab:** This panel is divided in two panels:
 - **Team Panel:** Enter Team Names and Teams Leader for each team. Team Leader must be registered as a Company's User.
 - **Team Members Panel:** Enter the team members for the selected team on previous panel. To import a list of team members (employees) see Appendix A.

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This Menu shows two options:


Company Ideas (Browser)

When selected, it shows the following screen:

IDENTIFIER	SUBMISSION DATE	SUBMISSION WEEK	SUBMITTED BY	IDEA TYPE	CATEGORY	TEAM	SUMMARY	ESTIMATED SAVINGS	POTENTIAL REVENUE	PRIORITY	IMPLEMENTED DATE	IMPLEMENTED BY	COMMENTS
▶ MEK-0001	6/17/2013	10	Fisis1	Type 1	Cost Reducer	Person...	efqefq	\$444.00	\$0.00				


Company's Ideas Browser

- The Selection Options on the top allows filtering of the registered ideas by any combination of them. When blanked all ideas are shown.
- Rows can be ordered by any column, ascending or descending, by clicking on the desired column.
- To see the details or edit any particular idea, click on the **Identifier** link. A page with the details will be opened in a new tab. See New Idea function below.
- **To add a new idea**, click on the Add Button (+). A blank detailed page will be open in a new tab. See New Idea function below.

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New Idea


To register a New Idea, fill the information from the Idea Card in the respective fields.


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HOME ADMINISTRATION CONFIGURATION IDEAS CHARTS & REPORTS

Company Ideas New Idea ✱ ✕

FISIS CONSULTORES



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Identifier:	Idea Type:	Submission Date:	Submission Week:	Team:	Submitted By:	Category:
<input type="text"/>	<input type="text"/>	<input type="text" value="6/17/2013"/>	<input type="text" value="10"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Summary:

Details:

Estimated Savings:	Potential Revenue:
\$0.00	\$0.00

Priority:

Status:

Implemented Date:

Implemented By:

Comments:

Registered By:

Location Name:

Save Refresh

Idea Registration / Editing Page

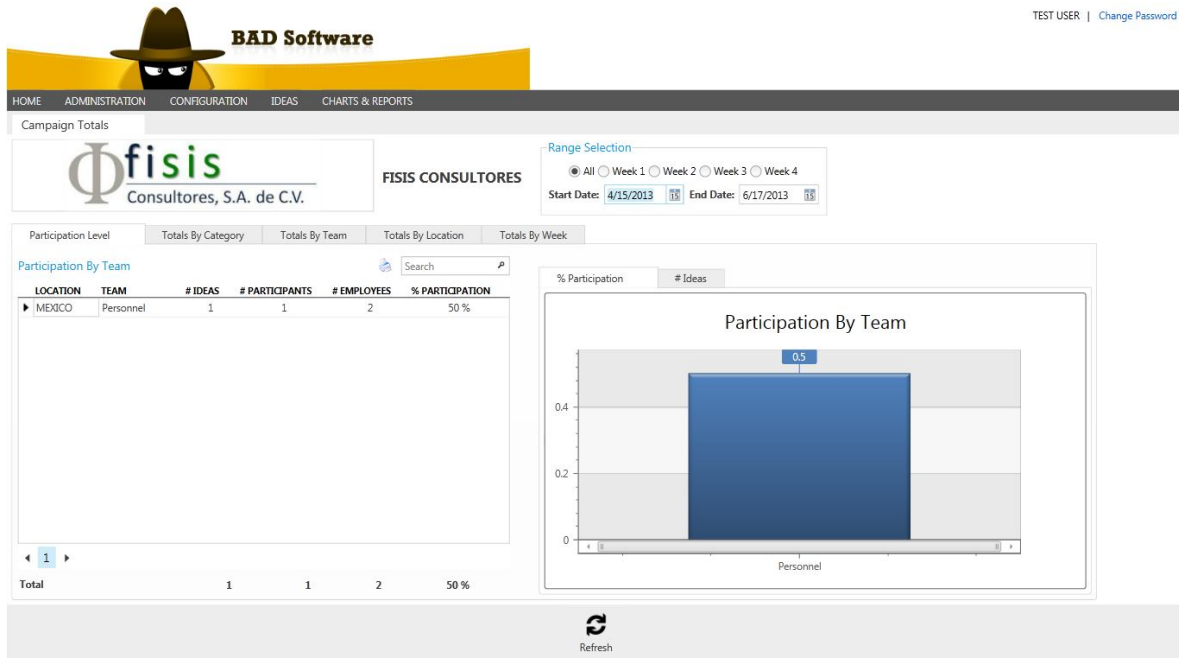
- Bold labeled fields are mandatory.
- Team dropdown list presents the related teams to the company.
- Submitted By dropdown list presents related selected team members.
- Estimated Savings and/or Potential Revenue value must be greater than zero.
- Identifier will be generated automatically for each idea in the format *LocationPrefix-Consecutive*, example: MEX-00001.
- Submitted Week is calculated based on the Company's Campaign Start Date and the Idea Presentation Date.

CHARTS & REPORTS

Campaign Totals

This menu presents the results of the campaign at any moment:

Viewing Results



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HOME ADMINISTRATION CONFIGURATION IDEAS CHARTS & REPORTS

Campaign Totals

fisis Consultores, S.A. de C.V. **FISIS CONSULTORES**

Range Selection: All Week 1 Week 2 Week 3 Week 4
 Start Date: 4/15/2013 End Date: 6/17/2013

Participation Level | Totals By Category | Totals By Team | Totals By Location | Totals By Week

Participation By Team

LOCATION	TEAM	# IDEAS	# PARTICIPANTS	# EMPLOYEES	% PARTICIPATION
MEXICO	Personnel	1	1	2	50 %
Total		1	1	2	50 %

Participation By Team Chart: % Participation, # Ideas. Bar for Personnel: 0.5


Refresh

Campaign's Totals Page

- Range Selection allows filtering of results by week or a date's range.
- Separated tabs are presented by:
 - Participation's level per location / team
 - Totals by Category, Team, Location or Week.
- Each graphic's panel has different tabs to see the chart by Quantity or Value.
- Results can be printed out by choosing the Printer Icon above the grid.

Printing Results

Once you click on the printer icon, you will be directed to a new tab on which you can preview the report:

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BAD Software

HOME ADMINISTRATION CONFIGURATION IDEAS CHARTS & REPORTS

Campaign Totals rptParticipations

100%





FISIS CONSULTORES
Participation

Location **MEXICO**

Team Personnel	# Ideas 1	Participants 1	# Employees 2	% Participation 100%
Total MEXICO	1	1	2	50%
Grand Total	1	1	2	50%

Page: 1 / 1 Zoom: 100%

 Save
  Refresh

Report Preview Page

- You can navigate across the report by clicking the arrows.
- You can zoom the view as needed.
- You can Print Out the report by clicking the Printer Icon.
- You can export the report to any format in the list of the Save Icon.

APPENDIX A




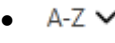

Common Functionalities

- Each time you select a Menu option it will open a new screen in a new tab. The screen will remain open until you close it by clicking in the right X located in the upper corner of each tab.
- A star aside the tab titles indicates that there are pending changes not saved yet.





If you try to close the screen you will be prompt to save, discard the changes or cancel the closing operation.

- The next buttons appear almost on each screen and – when enabled – they allow to:

	Add a new record to the respective collection shown above it.
	Edit the selected record from the collection above it.
	Delete the selected record from the collection above it.
	Sort the collection by the selected order and column (click on the arrow).
<input type="text" value="Search"/> 	Look up for a text.

s


Other buttons appear at bottom of each page:

 Save	Save all pending changes on current page
 Refresh	Refresh current page data. If there are pending changes you will be prompt to save or discard them or cancel the operation.

Roles & Permissions

BAD SW works based on roles. Each role has permissions that allow user to access functions of the program, according to the next table:

	Company Coordinator	Location Coordinator	Team Leader
Create Companies	√		
Add Locations to Company	√	√	
Add Users to Company	√	√	
Add Teams &	√	√	

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Members to Company			
Browse Ideas	√	√ (own location)	√ (own team)
Register Ideas	√	√ (own location)	
See Charts & Reports	√	√ (own location)	√ (own team)

User's Credentials

These are composed by **User Name** and **Password**.

User name must be unique across the system. It is recommended to use the email address of the user to avoid duplicities.

Password must have at least 7 characters with a mixture of capital letters, numbers and special characters (*, #, \$, or so). It cannot contain spaces.

When a user is added by the first time, the Password is set to [**Sqi*2013**] (see the composite of the characters). It is highly recommended to change it after logged in the first time.

Importing Large Lists

When there is necessary to enter large lists of items for a Company, it can be accomplished by importing them from a CSV formatted file.

Follow the next steps to save a list from Excel to CSV text format file:

Export data to a text file by saving it

You can convert an Excel worksheet to a text file by using the **Save As** command.

1. Click the **Microsoft Office Button** , and then click **Save As**.

The **Save As** dialog box appears.

2. In the **Save as type** box, choose the text file format for the worksheet.

For example, click **Text (Tab delimited)** or **CSV (Comma delimited)**.

NOTE The different formats support different feature sets. For more information about the feature sets that are supported by the different text file formats, see [Excel formatting and features that are not transferred to other file formats](#).

3. **On a computer that is running Windows Vista**

- In the **Address bar**, browse to the location where you want to save the new text file, and then click **Save**.

On a computer that is running Microsoft Windows XP

- In the **Save in** box, browse to the location where you want to save the new text file, and then click **Save**.

4. A dialog box appears, reminding you that only the current worksheet will be saved to the new file. If you are certain that the current worksheet is the one that you want to save as a text file, click **OK**. You can save other worksheets as separate text files by repeating this procedure for each worksheet.
5. A second dialog box appears, reminding you that your worksheet may contain features that are not supported by text file formats. If you are interested only in saving the worksheet data into the new text file, click **Yes**. If you are unsure and would like to know more about which Excel features are not supported by text file formats, click **Help** for more information.

Locations List

Click on the **Import Locations** button. You'll be prompted to provide the access path to the file containing the CSV formatted file to be imported. Columns mapping will be shown to confirm the correspondence of data.

A sample for the Locations' import list:

Location	Prefix
MEXICO	MEX
MINNEAPOLIS	MIN

Note: The columns headers must be equal to this sample.

Users List

Click on the **Import Users** button. You'll be prompted to provide the access path to the file containing the CSV formatted file to be imported. Columns mapping will be shown to confirm the correspondence of data.

A sample for the Users' importing list:

User Name	User Full Name	User Location	User Role
email1@domain.com	user1 name	MEXICO	Location Coordinator
email2@domain.com	user2 name	MEXICO	Team Leader

Note: The columns headers must be equal to this sample.

Team Members

Click on the **Import Members** button. You'll be prompted to provide the access path to the file containing the CSV formatted file to be imported. Columns mapping will be shown to confirm the correspondence of data.

EmployeeName
John Doe
Jane Doe

Note: The columns headers must be equal to this sample.