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# Journey Plan Maintenance

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Reference Guide

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Opmetrix Version 4.2 onwards

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## Introduction

**Journey Plan Maintenance** ? Info

Showing 25 result(s) between 01/10/2013 and 31/10/2013  
View Type: Rules, Category: "" Default "", Device: Rod.

Export Results | Print Results | Show Filters

Rules View | List View | Outlet View | Month View

Device: Rodney Bate | Category: "" Default ""

Make Draft | Make Live | Expire | Maintain Categories | Add Rule

**Journey Plan Rules List**

■	Status	Outlet Code	Outlet Name	Device	Reoccur	Start to End Date	Next Visit	Edit
<input type="checkbox"/>	✓ LIVE	1011	Coles Albury	Rod	Every 2 weeks on Monday	25/11/2010 to 31/12/2015	Monday 14/10/2013	
<input type="checkbox"/>	✓ LIVE	1016	Coles Bega	Staff Code RB	Every week on Tuesday	25/11/2010 to 31/12/2015	Tuesday 08/10/2013	
<input type="checkbox"/>	✓ LIVE	1021	Coles Burleigh Wat	Staff Code RB	Every week on Wednesday	25/11/2010 to 31/12/2015	Wednesday 09/10/2013	
<input type="checkbox"/>	✓ LIVE	1026	Bi-Lo Chermiside	Staff Code RB	Every week on Thursday	25/11/2010 to 31/12/2015	Thursday 10/10/2013	
<input type="checkbox"/>	✓ LIVE	1031	Pak N Save Sylvia Park	Staff Code RB	Every week on Friday	25/11/2010 to 31/12/2015	Friday 11/10/2013	
<input type="checkbox"/>	✓ LIVE	1036	Australian Hotel	Staff Code RB	Every week on Monday	25/11/2010 to 31/12/2015	Monday 07/10/2013	
<input type="checkbox"/>	✓ LIVE	1041	Campbelltown Club Hotel	Staff Code RB	Every week on Tuesday	25/11/2010 to 31/12/2015	Tuesday 08/10/2013	
<input type="checkbox"/>	✓ LIVE	1046	Fat Lamb Hotel	Staff Code RB	Every week on Wednesday	25/11/2010 to 31/12/2015	Wednesday 09/10/2013	
<input type="checkbox"/>	✓ LIVE	1051	Harold Park Hotel	Staff Code RB	Every week on Thursday	25/11/2010 to 31/12/2015	Thursday 10/10/2013	
<input type="checkbox"/>	✓ LIVE	1056	Lakes Hotel	Staff Code RB	Every week on Friday	25/11/2010 to 31/12/2015	Friday 11/10/2013	
<input type="checkbox"/>	✓ LIVE	1061	Newcastle Mercury Hotel	Staff Code RB	Every week on Monday	25/11/2010 to 31/12/2015	Monday 07/10/2013	
<input type="checkbox"/>	✓ LIVE	1066	Warehouse Napier	Staff Code RB	Every week on Tuesday	25/11/2010 to 31/12/2015	Tuesday 08/10/2013	
<input type="checkbox"/>	✓ LIVE	1071	Warehouse Palmerston North	Staff Code RB	Every week on Wednesday	25/11/2010 to 31/12/2015	Wednesday 09/10/2013	

Journey Plan Maintenance is a feature that enables an Administrator, Supervisor or Mobile User to plan, maintain and update call schedules for when Outlets should be visited.

These calls then appear as a calendar schedule in Opmetrix App. Opmetrix CMS also includes Journey Plan Compliance reports enabling measurement of scheduled calls vs. completed calls by mobile user.

In Journey Plan Maintenance you can:

- Review current appointments and amend recurring appointment dates.
- Check that all outlets have an active appointment plan
- Create draft appointments in advance to cater for busy seasons (Eg Christmas, Easter)

Journey Plan Maintenance is available to the Opmetrix Administrator and restricted access is also available to mobile users allowing them to maintain their own schedule.

## Getting Started

To maintain your Journey Plans, select in Opmetrix CMS the **Activity Tab** and scroll to **Journey Plan Maintenance** (left hand side). The following screen will appear

Journey Plan Maintenance ? Info

Showing 0 result(s) between 01/10/2013 and 31/10/2013  
View Type: Rules, Category: '' Default '', Device: '' None ''

Export Results Print Results Show Filters

Rules View List View Outlet View Month View Device: '' None '' Category: '' Default ''

Make Draft Make Live Expire Maintain Categories Add Rule

Journey Plan Rules List

Status	Outlet Code	Outlet Name	Device	Reoccur	Start to End Date	Next Visit	Edit
No Records Found!							

The above screen shot displays

1. Filter Options
2. Rule Toolbar
3. Default Rule View – List.

### Filter Options

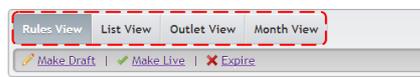
Standard Opmetrix App Filter Options are available. For further detail see Opmetrix App Training Manual.

## Rule Toolbar

The Rule Toolbar consists of two lines and choosing options will allow ongoing maintenance. We will describe each function available.

### View Options

Selecting various view options will allow you to easily maintain users' Journey Plans.



*Technical Note:*

*You can edit a rule directly from the List View. This edits the entire rule not just that particular one appointment date.*

*Technical Note:*

*You can edit a rule directly from Month View. This edits the entire rule, not just that particular one appointment date.*

### Rules View

Displays a list of current recurring appointment rules

### List View

Displays a list of actual appointments based on the current rules.

### Outlet View

Displays a list of outlets and indicates if they have a current appointment rule or not.

You can add a rule directly from the Outlet View for Outlets that don't have an active rule.

### Month View

Displays a calendar and appointments on a month by month basis

This includes active appointments (blue) and draft appointments (yellow). Appointments are ordered for each day.

### Filters

There are two dropdown filters available – Device and Category



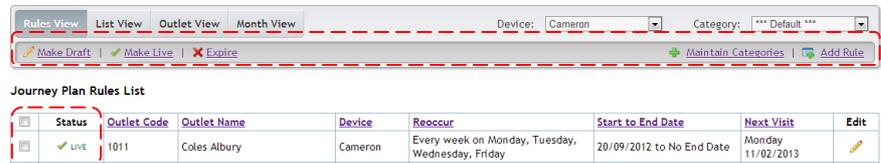
**Technical Note:**

*If Journey plans are imported from another source they always appear in the \*\*\*Default\*\*\* category.*

<b>Device</b>	Selects a device and displays a list of rules that currently apply to that device.
<b>Category</b>	Rules can be separated in categories (eg Christmas, Easter). <b>***Default***</b> is the default selection of rules.

**Editing Rules**

The following five editing functions are available, Make Draft, Make Live, Expire, Maintain Categories and Add Rule



**Make Draft** As an interim step, change a rule to Draft by ticking the box on the left hand side and then tap on **Make Draft**. The Line turns yellow, or tick the top left corner box to select all. (A Draft rule does not appear on Opmetrix App.)

**Make Live** To **make** a rule **Live**, tick the box on the left hand side and then tap on **Make Live**. The Line turns yellow, or tick the top left corner box to select all. (A Live rule will appear on Opmetrix App when the user next syncs.)

**Technical Note:**

*Expired rules that are made active again must have their start and end date manually set.*

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**Expire**

To **Expire** a rule, tick the box on the left hand side and then select. The Line turns yellow, or tick the top left corner box to select all. (An expired rule will no longer appear on Opmetrix App after the user next syncs.)

When you Expire an appointment Opmetrix changes the End date of the Rule to the day before today. That way you can historically see what a Journey Plan rule looked like in the List view, but they won't appear in the List view going forward.

**Maintain Categories**

Admin Only Function - Add and maintain new Journey Plan categories by selecting **Maintain Categories** (See notes on page 12.)

**Add Rule**

Select **Add Rule to** create a new Journey Plan Rule. (See notes on next page.)

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## Journey Plan Add Rule

The Journey Plan add rule form defines which outlet the rule is for, the appointment time and how frequently the rule reoccurs (eg Daily, Weekly or monthly).

There are four sections to complete for every rule.

1. Appointment Details
2. Range of Recurrence
3. Appointment Time / Position
4. Recurrence Pattern

### Appointment Details

#### Admin Tip:

Apply an Outlet Staff Code filter to limit the outlets to a specific user if you are working on one users Journey plan at a time.

#### Outlet

Select an outlet from the list. This list will be all outlets (Admin access) or just the user's outlets (User access).

#### Device

This will default to the logged in user (or select from the list).

#### Category

Use **\*\*\*Default\*\*\*** unless you are creating rules for specific categories (eg Xmas, Easter)

### Range of Recurrence

*Admin Tip:*

*Use No End Date for default rules and put a valid start and end date for category rules (eg Xmas, Easter).*

**Start**

Select Start date for when this rule should apply. Defaults to today

**End Date**

Select **No End Date** or enter the date this rule should automatically stop on. The default is one year.

### Appointment Time / Position

**Time**

Enter the Start Time for this appointment

**Position**

If you don't use start times you can enter a position eg 1,2,3 or A,B,C

**Duration**

Select the appointment duration.

### Recurrence Pattern

Recurrence Pattern

Daily  
 Weekly  
 Monthly  
 Yearly

Recur every  week(s) on:

Monday       Tuesday       Wednesday       Thursday  
 Friday       Saturday       Sunday

<b>Daily</b>	Appointment will occur every x days from the start date.
<b>Weekly</b>	Appointment will occur every x weeks on the selected days
<b>Monthly</b>	Appointment will occur every x months on the nominated day
<b>Yearly</b>	Appointment will occur every x years on the nominated day

Once the above 4 sections are completed finalize rule per the options below

Cancel

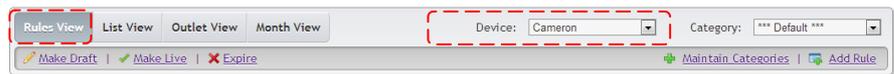
Save as Draft

Save as Live

<b>Save as Live</b>	Rule will come into effect immediately
<b>Save as Draft</b>	Rule will be saved but not be available until changed to live
<b>Cancel</b>	Cancels changes and does not save

## Editing Rules

From the **Rules View**, select a **Device** to display a list of current rules applicable to that user.



### Journey Plan Rules List

<input type="checkbox"/>	Status	Outlet Code	Outlet Name	Device	Reoccur	Start to End Date	Next Visit	Edit
<input type="checkbox"/>	DRAFT	1064	Warehouse Manukau	Cameron	Every week on Monday, Tuesday	10/07/2012 to No End Date	Monday 11/02/2013	
<input type="checkbox"/>	LIVE	1177	Liquorland - Beachlands	Cameron	Every year on the 1st Monday of January	01/09/2012 to No End Date	Monday 06/01/2014	
<input type="checkbox"/>	DRAFT	1152	Countdown Whangarei	Cameron	Every week on Monday, Tuesday	17/09/2012 to No End Date	Monday 11/02/2013	
<input type="checkbox"/>	LIVE	1042	Drovers Dog Tavern Hotel	Cameron	Every week on Saturday, Sunday	17/09/2012 to No End Date	Saturday 09/02/2013	
<input type="checkbox"/>	LIVE	1011	Coles Albury	Cameron	Every week on Monday, Tuesday, Wednesday, Friday	20/09/2012 to No End Date	Monday 11/02/2013	
<input type="checkbox"/>	LIVE	1012	Coles Annandale	Cameron	Every week on Monday, Tuesday	20/09/2012 to No End Date	Monday 11/02/2013	
<input type="checkbox"/>	LIVE	1013	Coles Australind	Cameron	Every week on Wednesday	20/09/2012 to No End Date	Wednesday 13/02/2013	
<input type="checkbox"/>	LIVE	1014	Bi-Lo Banora Pt	Cameron	Every week on Thursday	20/09/2012 to No End Date	Thursday 07/02/2013	
<input type="checkbox"/>	LIVE	1015	Coles Beechboro	Cameron	Every week on Friday	20/09/2012 to No End Date	Friday 08/02/2013	
<input type="checkbox"/>	LIVE	1016	Coles Bega	Cameron	Every week on Saturday	20/09/2012 to No End Date	Saturday 09/02/2013	

Rules will show as either **Live** or **Draft**. (**Expired** Rules are not shown in this list.)

To add a new rule select **Add Rule** from the Rules Toolbar and complete the Journey Plan Add rule fields.

To edit an existing rule select the right hand **Edit Column (Pencil Icon)** beside the desired rule.

Editing Rules displays when this rule was last modified and by whom. It also displays what the current rule is to assist in the change you are making.

### Journey Plan Edit Rule

DRAFT last edited on 1st October 2013 by Admin.

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**Appointment Details**

Outlet:  Device:

Outlet Code: 1011 Category:

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**Range of Recurrence**

Start:   No End Date

End Date:

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**Appointment Time/Position**

Time  Position Position:  Duration:

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**Recurrence Pattern**

Current rule: Every 2 weeks on Monday, next visit on Monday 14/10/2013.

Daily  Weekly  Monthly

Recur every  week(s) on:

Monday  Tuesday  Wednesday  Thursday

## Category Maintenance (Admin Only)

Categories can be used to filter appointment rules to a specific time frame. For example, a category could be added for the Christmas season, where calls might be made more frequently.

Only an Admin can create, edit and delete categories however users can select a category and apply rules to it.

### Journey Plan Category Maintenance ✕

Category Name	Delete
Christmas Schedule	✕
Easter Schedule	✕
accidental	✕

**Add Category**

Add New Category:

## Shared Journey Plans (Admin Only)

Every Device login (user) has a journey plan which appears as a calendar on their device.

A Users Journey Plan can be shared to one or multiple users using this Shared Journey Plan option.

Shared Journey Plans:

- Rod, Rodney Bate
- David, David Barley
- + Add a shared Journey Plan

### ***On Opmetrix App***

If Journey plans are shared, the same appointment will show in each user's calendar. When a user completes an appointment it will be marked as complete and the last visit date is updated on that user's device. The appointment on other users' devices will still show as to be done.

### ***In Opmetrix CMS***

Even though other users can see the shared appointments, compliance is only measured against the owner, and only the owner can achieve that.

For every Device login that is added to the system, other user's Journey Plan appointments can be shared.