



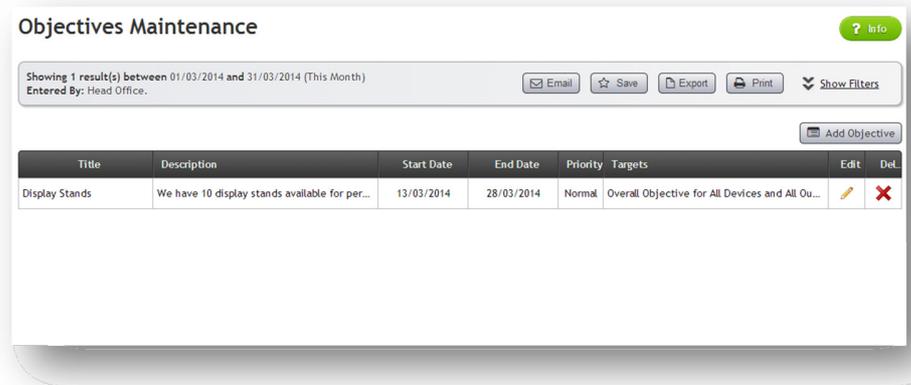
Objectives Module

Quick Reference Guide

Opmetrix Version 4.2 onwards

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Introduction



The Objectives Module enables objective-driven workflow processes that are set by management.

In addition, the field team can set their own personal objectives either for themselves or for the individual outlets they manage.

Progress towards objective goals can be reviewed from both a management and field perspective allowing clear communication of progress and achievement.

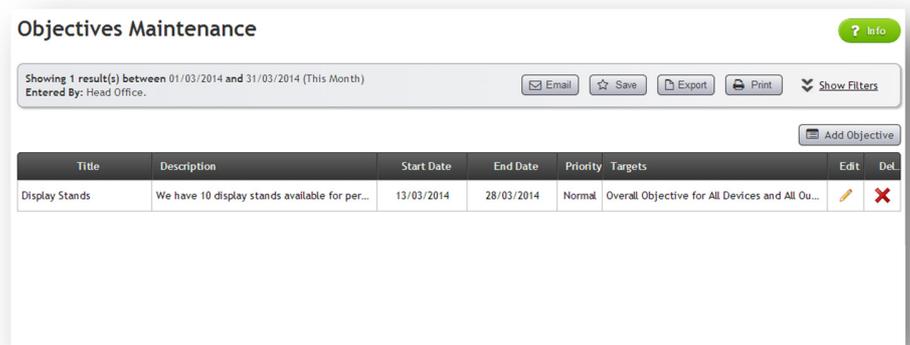
There are four types of Objectives:

- **Team** - field users work collectively to achieve a goal
- **User** –field users work separately to achieve a goal
- **Personal** - field users set their own objectives
- **Outlet** – field users set their own objective for an outlet

Objective Maintenance is available to the Opmetrix Administrator and restricted access is also available to supervisors enabling them to set, maintain, and report on objectives.

Objective Maintenance

Objective Maintenance is available in Opmetrix CMS on the **Objective Tab** for users with **Admin, Executive or Supervisor** access.



The main screen functionality is as follows:

Add Objective	Opens the objective dialogue box
Edit / Delete	Edit / Delete and existing Objective
Show Filters	Filter the objectives using customer or device categories



By default only objectives added via Opmetrix CMS display in this list. You can show all objectives (including ones added by field users) by selecting ***** ALL ***** in the **Entered by** filter then selecting **Apply Filters**

Adding Objectives

Select **Add** to open the add Objective dialogue box

Objectives Maintenance Edit

Details

Title:

Description:

Start Date: 13/03/2014

End Date:

High Priority:

In Task List:

Rules

This objective is to reach a target of 1 for Each and every Outlet

Targets

Outlet ID	Type	Channel	Region	Banner	Team	Size	
*** ALL ***	✓ Add						

Cancel Save

Add Objectives has 3 criteria:

Details - These are the basic details of **title, description, start date** and **end date** to complete the objective. Selecting **High Priority** highlights the objective in red in Opmatrix App, and selecting **in Task list** promotes it to the main in-store task list as well as appearing in the standard objectives list in Opmatrix App.

Rules - Describes if the task is a team or individual objective, the goal to achieve it and who it is for.

Targets - Filters the objective so it only applies to selected outlets or field users.

More on Rules

The rule describes the task and influences how objectives are reported on. The three entry fields can be used as follows:

Objective Example: There are 10 Display stands to distribute in the Southern region.

The objective can be configured:

For the participating team means the object can be achieved collectively (*eg there are 10 display stands in total and the team will distribute them*). While **for each participating user** means the objective is achieved individually (*each user must distribute 10 display stands*)

For the participating team

For each participating user

or

To reach a target of is the goal to achieve the objective. In this example it would be set to 10 and the goal is shown as complete when this is achieved.

to reach a target of

10

For **Each and every outlet** would require every store that this objective is targeted at to take 10 display stands. **For any of the available Outlets** would require 10 display stands to be distributed to any of the available outlets (they could take 1 or more).

Each and every Outlet

Any of the available Outlets

For **Themselves** would not target the objective to an Outlet but require each user to acknowledge they had 10 display stands. An objective more appropriate to this type would be for example : “Hand in monthly report”

Themselves

More on Targets

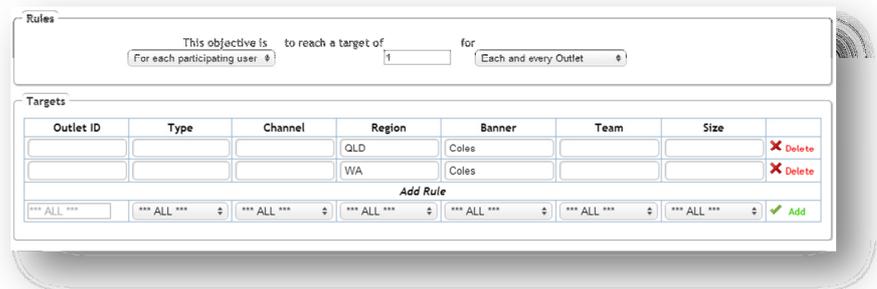
Targets enables filtering Outlets that should be assigned to this objective.

Depending on the objective rules set, targets will be based on customer Hierarchy (targeted towards Outlets) or Device and Supervisors (targeted towards users).

Select the Target configuration then select **Add**. You can add multiple targets and delete as required.

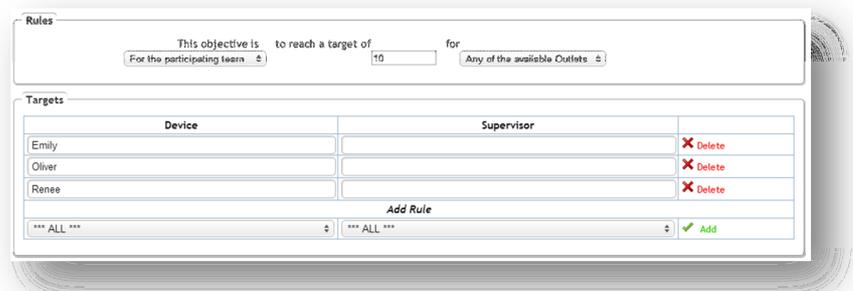
Example 1

This rule is set for **each and every outlet**. Therefore the target is based on customer hierarchy. In this example Coles QLD and Coles WA Stores are the targets.



Example 2

This rule is set for the participating team there targets for Device and Supervisor are shown. In this Example Emily, Oliver and Renee are included in this team objective



Objective Reporting

There are two Objective reports available in Opmatrix CMS.

Objective Audit Log

The objective audit log displays every entry made against objectives. By default the most recent are displayed at the top. Standard Filters and sorting of columns are included.

Report specific filters enable users to select a specific objective then display the audit results for just that one objective (Dates and other filters still apply).

Selecting a dig will drill down to display more detail.

Objectives Audit Log ? Info

Showing 6 result(s) between 01/03/2014 and 31/03/2014 (This Month)
Entered By: Head Office.

Objective Title	Device Login	Outlet Id	Outlet Name	Outcome	Date Time	Notes	Img
Display Stands	Demo	1014	Bi-Lo Banora Pt	No	13/03/2014 15:33	Required thanks	
Display Stands	Demo	1020	Coles Broadbeach	No	13/03/2014 15:32	In store	
Mileage Rep	Demo	n/a	n/a	No	13/03/2014 15:31	Done	
Juke Boxes	Demo	1092	Caltex Ashburton	No	13/03/2014 15:30	Installing now and will b...	
New Display	Demo	1095	Caltex Avonhead	No	13/03/2014 15:28	Done	
Juke Boxes	Demo	n/a	n/a	No	13/03/2014 15:26	One requested first march	

By default only objectives that were created in Opmatrix CMS display in reporting. You can show all objectives (including ones added by field users) by Selecting ***** ALL ***** in the **Entered by** filter then selecting **Apply Filters**

Report-Specific Options

Objective: Entered By:

Objective Summary

The objective summary displays objectives and the current summary status of the objective.

By default the list is sorted by the objective title. Standard filters and sorting of columns are available.

Report specific filters enable selection of a specific objective then displays the audit results for just that one objective (Dates and other filters still apply).

The **started column** indicates the progress of the number of outlets or devices (depending on target rules) that have begun working on this objective. The **completed column** indicates the progress towards the goal.

Objectives Summary ? Info

Showing 4 result(s) between 01/03/2014 and 31/03/2014 (This Month)
Entered By: Head Office.

Title	Description	Start Date	End Date	Days Left	Devices Targeted	Outlets Targeted	Started	Completed
Display St..	We have 10 display stands aval...	13/03/2014	28/03/2014	15 days	All Devices	All Outlets	100% (1)	100% (1)
Juke Boxes	We have 5 Duke Boxes to distri...	13/03/2014	20/03/2014	7 days	All Devices	All Outlets	0% (0)	0% (0)
Milage Rep	Hand in your report by Friday	13/03/2014	24/03/2014	11 days	All Devices	All Outlets	0% (0)	0% (0)
New Displa..	Put up display in every Countd..	13/03/2014	17/03/2014	4 days	All Devices	All Outlets	0% (0)	0% (0)

By default only objectives that were created in Opmetrix CMS display in reporting. Show all objectives (including ones added by field users) by Selecting ***** ALL ***** in the **Entered by** filter then selecting **Apply Filters**

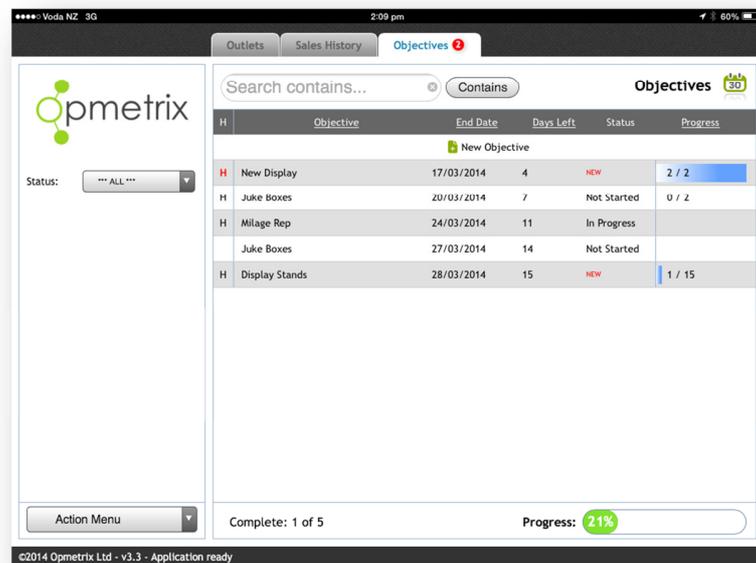
Report-Specific Options

Entered By:

Objective Tab on Opmatrix App

Objectives in Opmatrix App appear as a list by selecting the Objectives Tab.

The red number **2** indicator displays any new Objectives that have been added by head office that have not yet been read. Once objective is selected and read, it is no longer marked as new



H or H

Indicated the Objective has been added by Head office. **H** indicates high priority

Progress

The bottom right progress bar indicates total progress for all objectives while the progress column shows progress for each objective with multiple outlets.

Status

Completed objectives are shown in grey and objectives with less than 3 days to complete show in red.

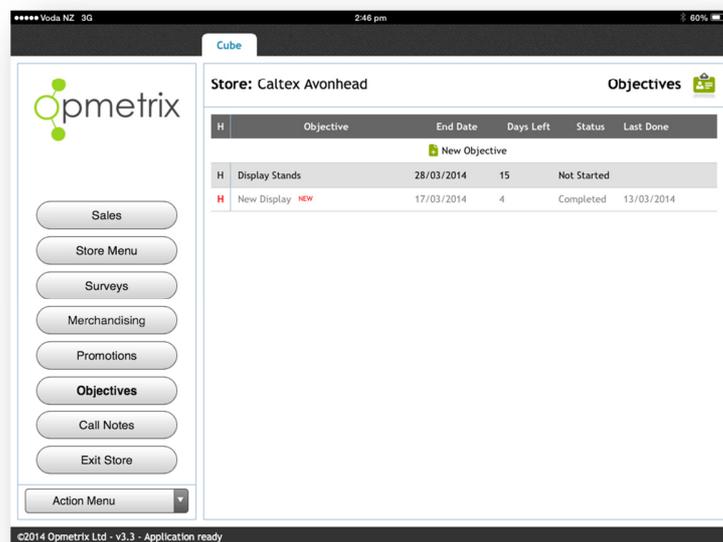
Adding new objectives on Opmatrix App

Users can add their own objectives directly in Opmatrix App. There are two types of objectives.

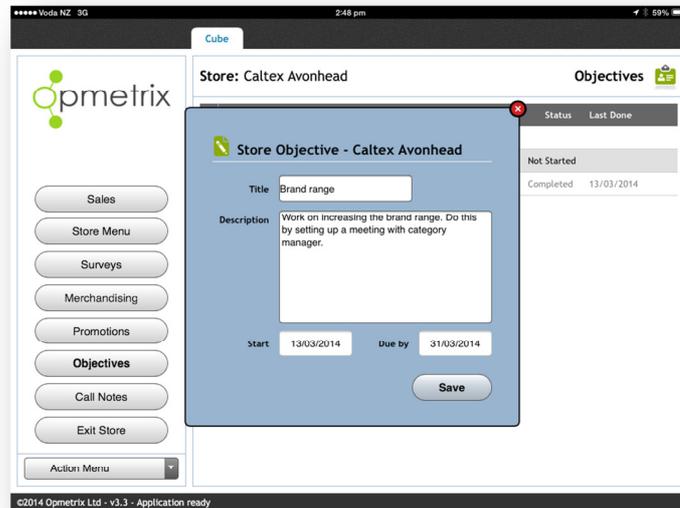
1. If a user adds an objective after selecting and starting a store visit, the object is attached to that store. This is useful for setting single goals for a store (eg increase the products they stock).
2. Adding an object directly from the objectives tab adds a personal objective or reminder for that user. (eg achieve ten new displays this month) and is not related to an Outlet.

Outlet Objectives

Select the **Objectives** menu while in the selected store then select the **New Objective** button

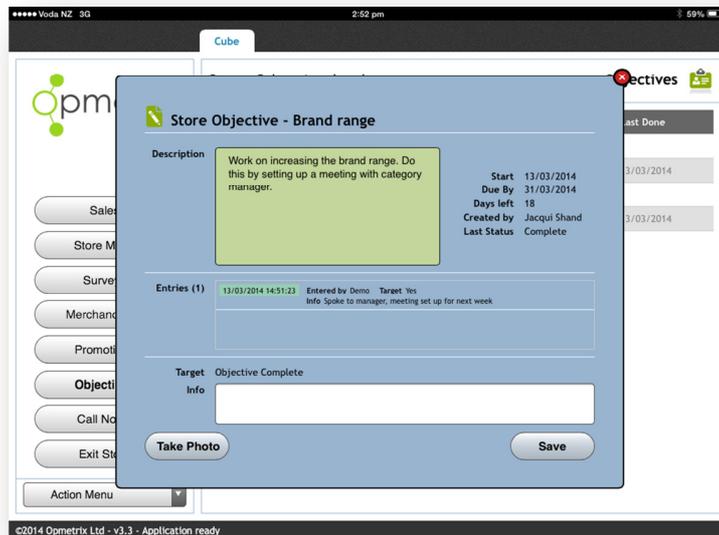


Complete the objective information including Title, Description and set an end date goal. Select **Save** or discard by pressing the **X** button.



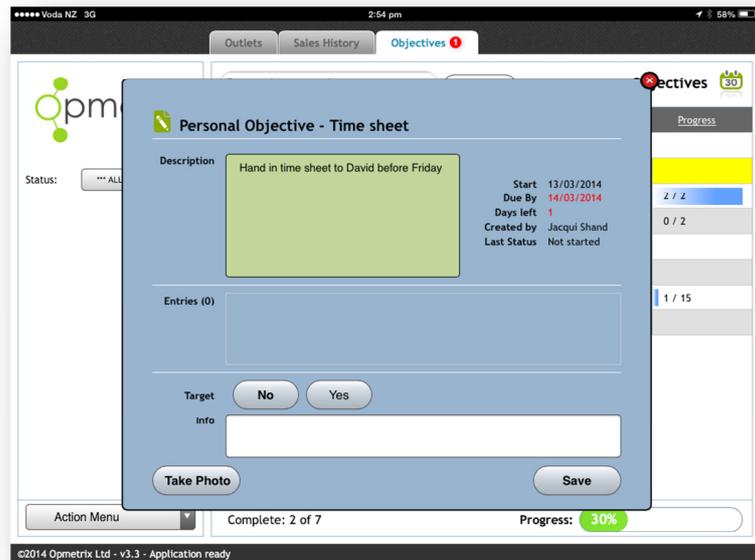
Entries towards this objective can be added during subsequent store visits.

Select the objective and add a new entry. Change the target to **YES** only when you achieve the goal for this objective. **NO** means the goal has not been met, but you are adding info/notes which then appear in the entries log.



Personal Objective

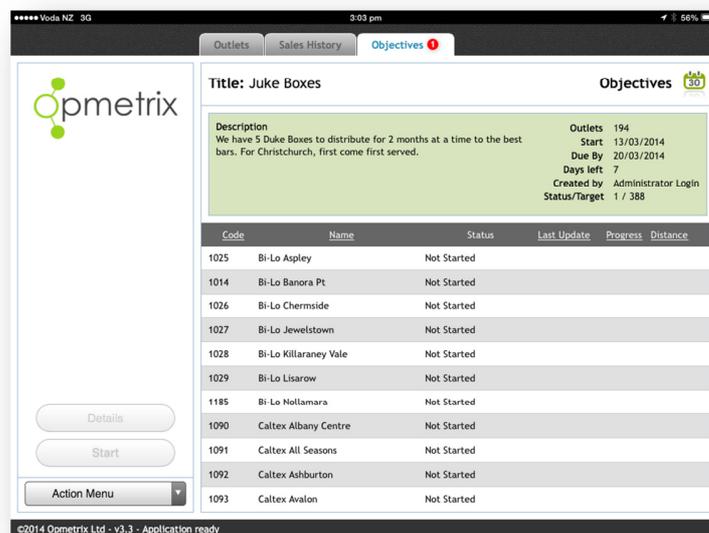
A personal objective has the same field information except it is added and updated outside of an outlet visit, directly from the Objectives Tab.



Updating Head office Objectives (App)

A head office objective may be applicable for a number of outlets.

When an objective is selected a list of outlets applicable to the currently logged in user in Opmetrix App for this objective is displayed.



If an objective has been completed or is in progress for an outlet the last update and progress columns will indicate this.

Updating an Outlet Objective

To update an objective for an outlet, select the outlet then select Start. This is the same process as completing a store visit (eg in-store, out of store) for that outlet.



Opmetrix App will display the outlet entry dialogue box

Status / Target

the goal for this objective. Note if this is a team goal, others may have contributed towards this target

Entries

A log of progress. Entries may be from other field users if this is a team goal.

Value

The value being contributed by this outlet towards the goal. A value of 0 means you are just recording a note. A value of 1 may indicate a 'yes' or the value may be entered (example 200 is entered as credit rebate value).

Objectives - Tips and Tricks

Users cannot edit objectives they have added in Opmetrix App and cannot change the goal date. The Opmetrix administrator can log in to Opmetrix CMS and can edit, change goal dates or delete an objective on their behalf using Objective maintenance

Adding an entry for an objective even without completing the goal reports progress for an objective in the reporting suite.

If a Tablet (Eg iPad) is reloaded with Opmetrix App all Objectives default to new status.