

The logo features a dark grey vertical bar on the left with a white curved shape on its right edge. The word "SmartOffice" is written vertically in a bold, sans-serif font. "Smart" is in solid black, while "Office" is in a white outline style. A registered trademark symbol (®) is located at the top right of the "e" in "Office".

SmartOffice[®]



Enterprise View User Guide

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Enterprise View Overview

The available Enterprise View options in SmartOffice affect the system in multiple ways. This document provides an overview of the multiple uses and effects of this powerful SmartOffice feature.

There are multiple reasons for this functionality – the two most important being easy distribution of system and configuration data (e.g., filters, letters, Dynamic Reports, etc.) to the field and powerful data viewing and navigation features that enable more flexible use of the system for certain designated Enterprise Users.

Distribution of Information (Data Population)

Definitions

In order to discuss data distribution, it is important to understand the important terms that are used:

Contact Information – includes contact records and all types of records that are directly linked to contact records such as: SmartPad, Investments, Policies, Activities, Letters, Documents, etc.

System Data – is non-contact information. This type of information includes items that are not directly linked to contact records, and can generally be described as configuration or utility types of records such as: Form Letters, Dynamic Reports, Filters, Word Tracks, Carrier Records, Product Information, Security Master Records, Seminars, Campaigns and Recruiting Positions.

Office ID #1 – When SmartOffice is installed and offices are created, the first office that is created is generally called System. However, the name is not important and can be changed. This document will refer to this office as Office ID #1. This office is special because the System Data entered into this office is automatically visible to every other office in the system, whether or not the other offices are located below it in a specific hierarchy. Due to its powerful nature, very few home office users should have access to this office.

Distributed Enterprise – Although most non-contact information will be distributed from Office ID #1, there may be times when it is necessary to administer more regional or local control of the distribution of some types of information. This is possible with the use of the Distributed Enterprise functionality. When offices are arranged in a hierarchical fashion, System Data can be shared with the offices below. See *Figure 1*.

Enterprise User – is a special type of user that has the ability to see information in the offices below their office. The role of Enterprise User is granted by selecting **User Management** from the **User Setup** expanded menu, on the **User Roles and Licenses** tab. For example, in *Figure 1*, if a user named Admin is created in the Western office and granted Enterprise User rights, they will have the ability to see not just contact and other types of information that is entered into the Western Office, but they are able to access the same information from all offices below the Western office.

Enterprise Hierarchy Effects of Distributed Enterprise Functionality

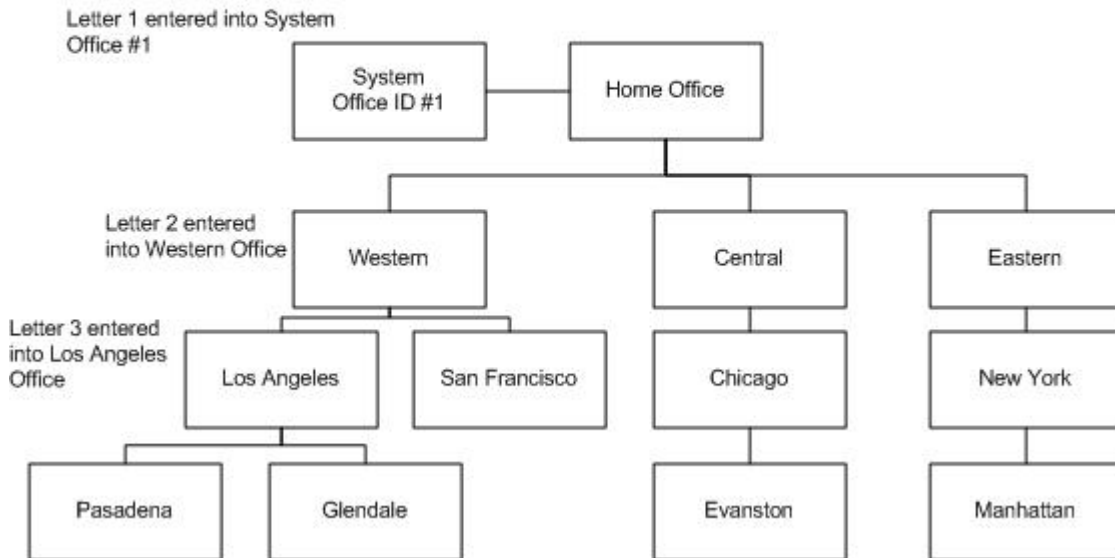


Figure 1 - Enterprise Hierarchy

The result of entering Letters 1, 2 and 3 are as follows:

- **Letter #1** – All offices have access to this letter. Notice that System Office ID #1 is not part of the office hierarchy, yet all the non-contact data entered into this office is shared with all offices.
- **Letter #2** – The only offices that have access to this letter are Western and all offices below Western (Los Angeles, San Francisco, Pasadena, Glendale)
- **Letter #3** – The only offices that have access to this letter are Los Angeles, Pasadena and Glendale.

Figure 2 displays the **System Letter Summary** spreadsheet with the Office Name displayed. This spreadsheet is available by selecting **Form Letters** from the **Office Setup** expanded menu. Please be aware that SmartOffice defaults to show all System Information as highlighted in light blue. As in most cases, the user does not need to know the specific office name of where the data came from. The option to embed the name of the office providing the information is a user choice and is located in the Column Customization dialog box. In the example below, Form Letters entered in Office ID #1 have the word “System” appended to them and letters created in other higher offices are appended with the name of that office. A letter not appended with an office name is a letter that has been created in the local office.

System Letter Summary

Letter Title	Open	Keyword	Type	Purpose	Created By	Modified On
<input type="checkbox"/> system : Agent - Status Update Letter		Agent - Status Update Letter	Form Letter	Followup - Addressed to Agents	ALLUSERS	01/15/2004 12:54PM
<input type="checkbox"/> system : Agent - Unable To Offer Coverage		Agent - Unable To Offer Coverage	Form Letter	PCMUJW - Addressed to Agents	ALLUSERS	01/07/2004 10:42AM
<input type="checkbox"/> system : Agent - Welcome Letter		Agent - Welcome Letter	Form Letter	Agent Requests - Agent	ALLUSERS	01/07/2004 10:43AM
<input type="checkbox"/> system : Annual Birthday Demo Letter		Birthday	Form Letter	Marketing	ALLUSERS	01/07/2004 10:43AM
<input type="checkbox"/> system : Annual Review Letter		Marketing	Form Letter	Marketing	ALLUSERS	01/07/2004 10:45AM
<input type="checkbox"/> system : Applicant - Status Update Letter		Status Update Letter	Form Letter	Followup - Addressed to Applicant	ADMIN	01/15/2004 12:56PM
<input type="checkbox"/> system : Appointment Confirmation Letter		confirmation	Form Letter	Confirmation	ALLUSERS	01/07/2004 10:46AM
<input type="checkbox"/> Appointment Confirmation Letter - Phil		Confirmation	Form Letter	Confirmation	Phil Williams	01/21/2004 12:54AM
<input type="checkbox"/> system : Appointment Requested Letter		Appointment Request	Form Letter	Seminar Tracking	ALLUSERS	01/07/2004 10:48AM
<input type="checkbox"/> system : Appointment Scheduled Letter		Appointment Schedule	Form Letter	Seminar Tracking	ALLUSERS	01/07/2004 10:49AM
<input type="checkbox"/> Corporate : Approval Letter to Agent		Approval	Form Letter	PCMUJW - Addressed to Agents	Phillip Anderson	12/30/2003 01:26PM
<input type="checkbox"/> Corporate : Auto No Home with run time discount for companion policy		P&C	Form Letter	Marketing	Michael L. Ashcroft	12/30/2003 01:26PM
<input type="checkbox"/> system : Auto Rate Decrease Cross Sell		Marketing	Form Letter	Marketing	ALLUSERS	01/07/2004 10:49AM
<input type="checkbox"/> system : Beneficiary Endorsement to Policy Holder		Policy Beneficiary Endorsements	Form Letter	Marketing	ALLUSERS	01/07/2004 10:50AM
<input type="checkbox"/> system : Birthday Letter: 50th		Birthday	Form Letter	Marketing	ALLUSERS	01/07/2004 10:52AM
<input type="checkbox"/> system : Call for an Appointment Letter		Call for an Appointment	Form Letter	Seminar Tracking	ALLUSERS	01/07/2004 10:54AM
<input type="checkbox"/> system : Carrier - Advisor Request Appointment		Carrier - Advisor Request Appointment	Form Letter	Agent Requests - Carrier	ALLUSERS	01/07/2004 10:55AM

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Figure 2 - System Letter Summary

Data Flow and Visibility

System Data

System Data records that are entered into a lower office are not available to an Enterprise User. For example, in *Figure 2*, if the Pasadena office creates a form letter called #4, an Enterprise User (perhaps from the Western Office) viewing the Pasadena office would not see letter #4. However, if letter #4 had been sent to a contact, and was posted to the contact's letter log, they would be able to see letter #4. This same principal applies to all system data. The basic rule for system data is that it flows down, not up.

Contact Data

Contact data is the opposite of System data. An Enterprise User in the Los Angeles office is able to view the contact data in the Pasadena office, and they can see contact data in the Los Angeles office; however, they cannot see contact data in the office(s) above them. The Enterprise User has the ability to view all contact data as if they were physically logged into the lower office. This user also has the ability to add new contact data in the lower office that will be available to both them and to users in the lower office with the rights to view the data. This right is granted through the Contact Assignment table.

It is also important to know that the rules of Record Privacy are always observed in the Enterprise View. An Enterprise User cannot mark a record as private in a lower office, thus preventing a user in the lower office from viewing data for which they would normally have the rights to view.

Enterprise User Setup and Settings

We recommend that Enterprise Users have a user role of Base Plus or Office Setup as these roles provide the ability to perform required assigned tasks both within their local office and the offices within their hierarchy (e.g., a Base Restricted user cannot send Mass Correspondence). The rights and roles available to a user in a higher office will be available to that user while using Enterprise View, including module-licensing options.

Various Enterprise Modes

Enterprise Users have the ability to pre-select their preferred mode at login. They can choose to always login with Enterprise View enabled or disabled. The preferred mode for Enterprise View is set on the User Preferences **Basic Info** tab.

No matter which default is selected, the user can easily change their settings without logging out of the system. The Enterprise View button on the menu bar has three options that are used to view data from within their own office, all of the offices in the hierarchy, or selected offices within the hierarchy. This functionality can present a tremendous increase in productivity.

Figure 3 displays the offices that may be selected for an Enterprise User when using the **View Data from Selected Offices within your Hierarchy** option. The Enterprise User can use this option to quickly change the domain of data they are dealing with.

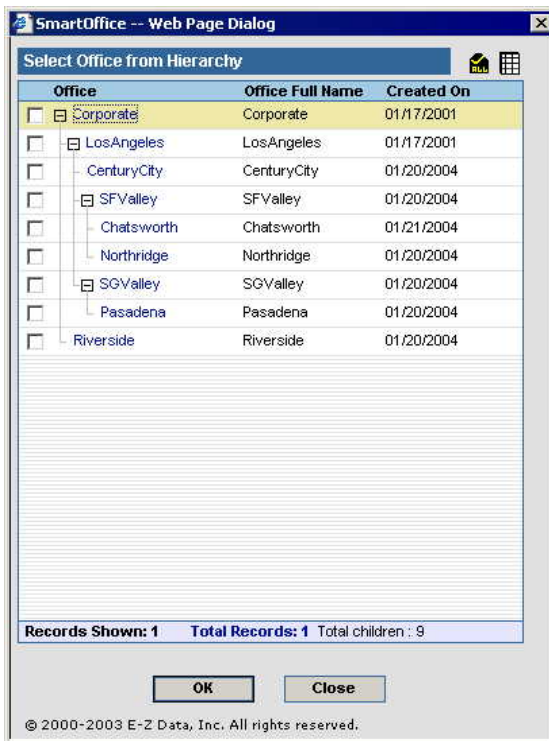


Figure 3 - Select Office from Hierarchy

What Can an Enterprise User Do?

An Enterprise User essentially has the same rights when working in lower offices that they have in their local office, with a few exceptions:

- An entire contact record cannot be deleted by an Enterprise User
- Mass Modify is disabled
- Mass Assignment is disabled
- The creation of Mass Activities is disabled

While working in a lower office, an Enterprise User can add and modify contacts, households, SmartPads, Activities, and Opportunities; view and send Letters; add and process Filters, Dynamic Reports, and Campaigns; create and modify Sets and access module specific contact data for which the user has a license. While global lists of contact data are available, global views of non-contact data are not available. This is especially true of non-contact data entered in the lower office as noted in the **Data Flow and Visibility** section of this document.

If the Enterprise User is in their own office and Proxy Subset is enabled, they are not able to turn Enterprise Mode on. An Enterprise User is automatically a Super User in their own office and all offices below them.

Viewing Contact Data in Lower Offices

Figure 4 shows that contact data is generally appended with the name of the office where the data is located. This provides a quick reference regarding the location of the data the Enterprise User is viewing and is used to determine which Office Data View Mode is currently selected. When referring to Contact data in this document, this is applicable to all types of contact records: Individual, Business, Advisor, and Household.

Individual Contact Summary

Contact Name	Type	Source	Occupation	DOB	Review Date	Total Premium
<input type="checkbox"/> LosAngeles : Abernathy, Brad	Client	Referral	Insurance	01/27/1978	07/27/2004	
<input type="checkbox"/> LosAngeles : Ackerman, Joseph M.	Client	Referral	Medical	02/27/1950	08/27/2004	5,104
<input type="checkbox"/> LosAngeles : Ackerman, Kathleen M.	Client	Seminar	Architect	01/03/1955	07/03/2004	6,101
<input type="checkbox"/> SFValley : Ackers, George	Client	Direct Mail	Warehouse Manager	01/24/1961	07/24/2004	
<input type="checkbox"/> LosAngeles : Adams, Frank	Client		Finance	05/29/1968	11/29/2004	
<input type="checkbox"/> LosAngeles : Adams, Margaret	Client	Referral	Real Estate	03/19/1942	07/20/2004	29,788
<input type="checkbox"/> LosAngeles : Adams, William	Client	Training	Food	04/14/1967	06/30/2004	17,400
<input type="checkbox"/> LosAngeles : Adcock, Martin	Client	Referral	Manufacturing	01/11/1963	03/14/2004	32,070
<input type="checkbox"/> LosAngeles : Alexander, Felicia	Client	Referral	Real Estate	04/01/1945	07/21/2004	405
<input type="checkbox"/> LosAngeles : Alexander, Sherman	Client	Referral	Real Estate	05/20/1937	01/15/2004	628
<input type="checkbox"/> LosAngeles : Anderson, Kathy	Client	Estate Seminar	Real Estate	08/10/1971	04/20/2004	350
<input type="checkbox"/> LosAngeles : Anderson, Mike	Client	Referral	Media	01/04/1959	01/15/2004	5,450
<input type="checkbox"/> LosAngeles : Ansong, David M.	Client	Referral	Medical	07/20/1953	02/15/2004	19,097

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Figure 4 - Contact Summary in a lower office

Effects of Enterprise Functionality by Module

What Should Users Expect When They Use the System in Enterprise Mode?

Various areas of the system address Enterprise View and the functionality of the Enterprise User within the module in essentially the same way but with slight differences. This section describes both the similarities between these modules and the differing nuances of functionality. This is not intended to serve as a substitute for a detailed explanation of Enterprise functionality per module but is instead intended as a means of gathering the essential elements in one general document. Please refer to the individual module guides for further clarification of specific functionality if required.

Base System

Security

An Enterprise User with Full Administrator rights has the ability to view and edit **Office** and **User** data for their local office as well as all lower offices within their hierarchy structure. This Enterprise Admin user can also view **Usage Console** data for all offices within their hierarchy.

One of the primary benefits of the enhanced Enterprise Admin view is the ability to have one localized Admin user manage information for other offices without the full ability afforded to the Office ID #1 Admin user who can create offices and assign licenses. Additionally, while it is a System requirement that all offices have at least one active Admin user, this provides the ability to provide local office administration without the need to train an Admin user for every office. While an Admin user must still be created for every new office, no one must log into the office specifically as this user to manage other users in this office. The Enterprise level Admin User can provide much of the functionality of an Admin User in Office ID #1 without the need of this expensive resource to manage other users.

SmartPad

The ability to view the SmartPad notes of a Contact record within an office or across offices within the hierarchy is limited to the view of available data. When an Enterprise User adds a new SmartPad note for a Contact that belongs to another office, the resulting entry will indicate which user created the note. This enables users in the lower office to track entries made on their behalf by an Enterprise User.

Activities

The Enterprise User will become a Super User when the Enterprise View is enabled. At that time, the user will have the ability to view the contact record information of the offices that were selected. In order for the Enterprise user to benefit, the user's Enterprise View mode must be enabled.

Abilities:

1. Enterprise users can view the activity information of the selected offices. With this access, the users can display the contact information and therefore view/create and include themselves as participant members.
2. The Enterprise user can select an office in order to multi-select users through the Activity View Options.
3. The role of the participant will not change. The other participants must have access to the contact information from within the contact record's office.
4. Enterprise users can add/modify/delete/privatize the activities that are created for the child office.
5. Activities will be posted to the SmartPad for the Child office.
6. The Calendar Activity Report can be generated by selecting a single office and then selecting multiple users.
7. The Enterprise user cannot see the activity information for those activities that are marked as Private.
8. The Private activities for the child office where the Enterprise user is not a participant and assuming that the Activity types are Projects and Appointments for Overdue Projects and Unfinished Appointments, respectively, are not displayed in the DayView List, Overdue Projects, and Unfinished Appointments areas.

Limitations

1. When viewing the activities that were created for the child offices, the activities will only be seen when the Enterprise View Mode is On and the particular offices are selected.
2. The Enterprise user cannot create Follow-up Activities based on Mass Correspondence for the Child offices.
3. The Enterprise user cannot do Mass Correspondence for the child office's contact records.
4. Even when the activity is created for a non-database record while selecting lower offices, the activity will display for the office where the Enterprise user resides.
5. Activity Statistics can be run for users who the Enterprise user has a proxy for (not from the users and offices that were selected).

Letter Writing

The ability to send a letter to a single contact in just one office or send one or more letters to multiple contacts across offices is one of the powerful marketing features of Enterprise View. If the Enterprise User is interested in accessing the contact information for one contact, but less than 100, then some type of contact search for the information may be the best method for locating the contacts and sending letters. To send more than 100 copies of a particular letter, a user must utilize the built-in functionality of the Mass Correspondence feature. This is available as a side menu item in the Reporting/Marketing section. This same restriction for sending more than 100 copies of a letter also exists for regular users and is not a unique functionality of Enterprise View.

When a letter is sent to a contact and the subsequent posting to SmartPad is enabled for the lower office where the Enterprise User is working, the proper notations will be made to both the Letter Log and the SmartPad of the contact. This information will also then be available to any lower office user who has an assignment for the contact and who can normally view entries made by other users within the office. *Figure 5* details the entries for a letter sent to the **Contact David Ansong** in the **Office LosAngeles** on behalf of the **Primary Agent Phillip Anderson** by an **Enterprise User** in the **Corporate** office at higher level of the hierarchy.

LosAngeles: David M. Ansong (Judy)

The screenshot displays the SmartOffice interface for user David M. Ansong in the LosAngeles office. The top navigation bar includes tabs for Summary, Personal, Add'l Personal, Household, Key Relations, Benefit, Letters/Documents, Opportunities, Custom, and Survey Response. The 'Letters/Documents' tab is active, showing a 'Letter Log' window with a table of letters. Below it, a 'SmartOffice -- Web Page Dialog' window shows a detailed view of the letters, including dates, types, notes, keywords, and user names.

Letter Title	Open	Keyword	Created On	Created By
College Education Funding		Marketing	01/21/2004 12:52PM	Enterprise User
D.I. Prospecting Letter		Marketing	12/19/2003 04:13PM	Phillip Anderson
Appointment Confirmation Letter		confirmation	02/03/2003 12:06PM	Greg Laymen
Seminar Confirmation Letter		Confirmation Letter	01/20/2003 11:54AM	Daniel Odell
Fund Manager Change		Investment, Service	10/08/2002 01:53PM	Phillip Anderson
Beneficiary Endorsement to Policy Holder.		Beneficiary Endorsements	07/27/2001 01:23PM	Michael L. Ashcroft

Date	Type	Notes	Keywords	User Name
01/21/2004	Letter	Title: College Education Funding	Marketing	Enterprise User
12/19/2003	Letter	Title: D.I. Prospecting Letter	Marketing	Phillip Anderson
12/18/2003	Activity	Appointment was scheduled on 05/12/2004 at 03:00PM (Active) - Annual review meeting with the Ansong		Phillip Anderson
02/03/2003	Letter	Title: Appointment Confirmation Letter	confirmation	Greg Laymen
02/03/2003	Activity	Appointment was scheduled on 02/12/2003 at 02:00PM (Active) - annual review meeting with the Ansong		Greg Laymen
12/19/2002	Inv. Trans	Type : Liquidate - Share:1595.56 - Name: American Funds Capital World Bond - Price:26.46 - Value:42220.0	Investment - Transaction	Phillip Anderson
12/19/2002	Inv. Trans	Type : Buy - Share:1595.56 - Name: American Funds Captial	Investment -	Phillip

Records Shown: 32 Total Records: 32
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Figure 5 – Contact Letters/Documents tab and SmartPad in a lower office

As noted previously, the Enterprise User cannot view any locally created office letters normally available to users in an office in the System Letter Summary. This limitation is due to the nature of the Distributed Enterprise View of non-contact data. The Enterprise User can view letters from both Office ID #1 and higher offices in the System Letter Summary.

Filters, Sets, and Dynamic Reports

The Enterprise User cannot view any locally created office Filters, Sets, or Dynamic Reports that are normally available to users in that office. This limitation is due to the nature of the Distributed Enterprise View of non-contact data. The Enterprise User can view Filters, Sets, or Dynamic Reports from both Office ID #1 and higher offices in these areas.

Reporting

Contact, Policy, Investment, Pending Case, Agent/Office Pending Case and Account Master crystal report categories are available in the SmartOffice Enterprise View. Enterprise Users can run existing reports and display the data for which they have visibility granted by the hierarchy. Transaction and Group Benefit reports are not implemented in SmartOffice 3.5 at this time. When implemented, the Transaction reports will not be available when Enterprise View is enabled. These reports can be run only in a single office level due to the large amount of data involved.

Opportunities

Opportunity Setup

Under Enterprise View, Setup information emulates System data and flows down the offices in the hierarchy.

The Opportunity Types/Stages/Actions defined at a higher office are available to the Child offices. These Child offices can add new opportunities using the setup information defined in the higher office.

Default Opportunity

- When a System and Parent Office both have default Opportunity types selected and the lower offices do not have any default Opportunity type selected, the System Office default is selected.
- If a Child office has an Opportunity default type selected, this will override all existing default Opportunity types.
- The user from a higher office can add and view opportunities in the child offices. If higher office Setup information is deleted, it will cascade delete linked opportunities from the Child offices.

Campaigns

Marketing Campaigns created in the higher offices are available to lower offices but not vice versa. For a lower office to view System data (e.g., marketing campaigns) it is not required to have an “Enterprise” role or Enterprise View set to “On”.

When a Marketing Campaign is created from a lower office, it is not accessible from the higher offices. However, when a campaign is linked to a lead record, the Enterprise User in the higher office can access the campaign details. The Enterprise User from the higher offices can modify the linked campaign.

Modules

Pending Case and Policy

Enterprise functionality in the Pending Case and Policy modules is used to allow a user in a higher office to view and manage cases and policies in a lower office. The Enterprise functionality is designed for an office/agency to process the pending cases/policies for an office/agent below them. This helps to eliminate work for the agency by allowing the agent to view and partially process the case.

The user in the higher office cannot see products entered by a lower office through the Product module; however, they can select the Product hyperlink located in a pending case or policy to view and modify the **Detail** tab for that product.

DataXchange

All records pertaining to DataXchange setup, configuration, and reporting are only viewable from the Office ID #1. These records will not be visible to any users in any other offices regardless of Office Hierarchy and Enterprise View. All local office production records created through DataXchange processing will adhere to the normal Enterprise View guidelines for the Contact, Investment, and Policy modules.

Investments

The operation and rules of Enterprise View apply to Investments in much the same way as it does in the rest of the Base System. The stream of data flows from the top downwards. When Enterprise View is enabled, the Enterprise User can view, add, modify, delete, and validate data in the lower offices just as if they were logged into the lower office. Reports can also be run for available data.

For security reasons, Investment Security Master records entered in a lower office will not be visible to an Enterprise User in a higher office from the side menu. Similarly, private records are not visible from the higher office. In addition, when Enterprise View is enabled, both Account Merge and the StatementOne Interface will not be available.

Leads

In the Leads Tracking Module (LTM), Enterprise View applies to the Leads Coordinator user role. As in other SmartOffice modules, the following are the prerequisites to activate the Enterprise View:

- In the System Office (Office ID # 1), the Enterprise Office Hierarchy must be defined.
- In the Manager User Roles, Enterprise must be selected.
- From the top menu bar, Enterprise View is set to “On”.

In LTM, Enterprise View allows the user to Assign, Forward and Revoke leads to and from offices in their hierarchy.

View Leads

An Enterprise User views and edits leads from lower offices in their hierarchy. Like other contact data, leads data flows upward.

Create Leads

An Enterprise User in a higher office can add a lead to a lower office. Consistent with Contact records, an Enterprise User cannot mark a record as private in a lower office and prevent a user in the lower office from viewing their own data.

Assign Leads

The Enterprise User has the ability to assign leads to lower offices. When assigning leads, the Enterprise User can select any office that is below the current office in the hierarchy.

For example, if Office 1 is the Parent Office and Offices 2, 3, 4 and 5 are the Child Offices, Office 1 can assign leads to any of the Child Offices.

Forward Leads

Regardless of Enterprise View, the Forward Leads feature enables a Leads Coordinator to send leads to a specific office or a combination of offices and advisors in their database.

Reject/Revoke Leads

When a lead is assigned to an advisor in a lower office and this advisor rejects the lead, the lead is pulled back to the original assigning office. The lead status changes to “Rejected by Agent”.

When a lead is assigned to an advisor in a lower office and the assigning office decides to revoke the assigned lead, the lead is restored to the original assigning office.

Leads Dashboard

Enterprise Users have the ability to select a specific office or all offices in their hierarchy for viewing analytical reports.

SmartRecruiting

SmartRecruiting uses an interface similar to that of base system contact management to add, view, and process candidates and recruits, and is an alternate view of contact and advisor records used to enable the user to manage individuals entered into a Recruitment Position Workflow.

The impact of the Enterprise role upon this module is almost identical to the contact and advisor sections. Likewise, the base system calendar and activity tracking systems are used as well, so any impact that the Enterprise role has upon these systems will also be felt when using SmartRecruiting.

The SmartRecruiting module is used by a single office or in an office hierarchy. When used in an office hierarchy, the position workflows and their components (stage types, action types, interview types, license types, and curriculum types) can be created at Office ID #1 or a distributed enterprise office and are available for use by offices below in the hierarchy. The office at the bottom of such a hierarchy can use these positions as defined in the higher offices, use all or some of the components in a position created at the local office level, or create a position composed entirely of components defined at the local office level. The users in the local office can also copy positions from the higher offices, modifying them as necessary, but these will become positions that are only visible at the local office level.

SmartRecruiting - Reporting

SmartRecruiting users who also have the Enterprise and Manager roles can run reports pertaining to SmartRecruiting on any user for whom they have visibility. The specific SmartRecruiting Reports are called the Recruiting Activity Management (RAM) Reports, namely the RAM Monthly and the RAM Year-to-Date Report. The RAM report is run within an office and may be run for a single user, all users, or any combination.

eOCS

The electronic One Card System (eOCS) uses an interface similar to that of base system contact management to add, view, and process candidates, and is an alternate view of contact records that enables the user to manage individuals entered into an electronic version of the One Card System workflow.

The impact of the Enterprise role upon this module is almost identical to the contact section. Likewise, a calendar and activity tracking system similar to that used in the base system is used as well, so any impact that the Enterprise role has upon these systems will also be felt when using SmartRecruiting.

eOCS - Reporting

When the Enterprise role is present along with the Manager and the eOCS role, the user can run reports pertaining to the Smart One Card System for any user that having the Enterprise role permits visibility of; these are the Monthly Summaries, the Career Activity Management (CAM) Report, the Control Card, and the Production Record reports. Within an office they may be run for a single user, all users, or any combination. The CAM Report can also be run for all users in multiple offices.

Smart Seminars

Seminars

In Enterprise View, Seminar records emulate contact data. The higher offices in the enterprise hierarchy can display seminars added in the lower offices. The Enterprise User in these offices has the ability to modify or delete seminars created in the lower offices.

Site Information

Like all other types of System data that exist in SmartOffice, the child offices in the hierarchy can see Seminar Sites. Child Offices can use Seminar Sites from the offices above in the hierarchy. A Seminar Site created by the higher office cannot be deleted until all seminars linked with that site in the lower offices are deleted.

Seminar Reports

In Enterprise View, Seminar Reports displays Seminar and Seminar Event data from the Child offices.