4 action+
recommendation tracking

Training Notes

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1.0 Introduction

Modern organisations are continually changing and improving. Actions are agreed by management and non-executives to ensure that these changes occur and organisational objectives are achieved. To ensure that the required changes are actually achieved it is essential that your organisation keeps track of all the recommendations and actions that have been agreed and that performance against implementing them is closely monitored.
Actions can arise from many sources; e.g.

- Non-executive or board decisions
- Senior management or departmental management decisions
- Organisational risk management processes
- Project developments
- External auditors
- Internal auditors
- Other external or regulatory review agencies

As an organisation you need the ability to collate the actions arising from some or all of these sources and then monitor whether these actions are being implemented.

4Action+ allows your organisation to:

- Record all actions or recommendations and allocate them to individual managers or members of staff for action
- To set a target date for implementation
- To automatically notify the individual responsible for the recommendation, that they have a new action point to address
- To automatically notify relevant individuals when deadlines are amended
- Pass the responsibility for updating the status of each recommendation point to the individual responsible for the action. This ensures efficiency savings and that responsibility and accountability for maintaining the recommendation status rests with the individual responsible for the recommendation
- Monitor the progress of individual recommendations and changes to target dates through a full audit trail
- Monitor overall progress on recommendation implementation, whether by source, period, status or individual responsible through reports.

1.1 Signing In

Once your organisation has been set up in the 4Action+ software you will be allocated a manager login. This user can then create new system users for their organisation through the web interface.

If the user subsequently forgets their password they can reset it through the forgotten password link and it is for this reason that we use the user's email address in setting up their username.

When you visit the 4Action+ portal you are presented with the user login screen as shown below:

Here you should enter your username and password as supplied to you. If you are on a computer that is secure and for your use only, you may choose to select the "Remember username" checkbox. This saves on typing next time. Please note that it will not, for security reasons, remember your password.

1.2 Changing the Password

When you log onto the system for the first time you should change your password to something that is both memorable and secure. We would suggest a minimum of 8 characters with a combination of letters and characters.

- From within the 'User Home Page' toolbar select the 'Account' Link.

The 'Account Settings' page is displayed

The 'Account Settings' Page

- Enter the current Password issued to you.

- Enter the 'New Password' consisting of a minimum of 8 'Alpha-numeric 'characters'.

- Re-Enter the 'New Password' as confirmation.

- Click on the 'Change Password' button to update the new password

- The following on-screen confirmation is displayed.

Home | Dashboard | Acc

Password change successful.

Passwords should be changed periodically to ensure their security and as soon as you believe that your security has become compromised. Do not write your password down, or share your password with others. If you believe that someone has access to your account then please change your password immediately.

The number of users that can be setup in 4Action+ is determined by the licence purchased. There should be a sufficient number of users that can be setup in 4Action + so please resist the temptation to share accounts.

1.3 Navigation Menu

The system navigation is controlled by a single menu in the upper right of the screen. The options available are determined by your login rights. The full menu is as follows:

Home | Dashboard | Account | Administration | Reports | Help | Logout

Home – Recommendation home page showing the recommendations that you are assigned or have created. If permissions are set then you may also have access to the search facility.

Dashboard – A graphical summary of the outstanding recommendations aged by the target date.

Account – Password change.

Administration – Functions which allow the administrators of the system to setup the configurable options of the software.

Reports – Reporting module of the software allowing for a variety fo customisable reports to be generated from the system.

Help – Access within the system to the user manual

Logout – Ends your current session and returns you to the login screen.

1.4   Administration Menu

Administrators of the system will be iven access to the administration menu so that various configurable options can be setup within the system.

The menu will appear as follows:

Manage Users

Manage Active Directory

Manage Priorities

Manage Classifications

Manage Custom Fields

Import Recommendations

Layout Import

Manage Alerts

Message Templates

Edit Language

The menu options are explained in more detail throughout this user guide.

2.0   Managing Classifications

Recommendations come from multiple sources and it is vital that we are able to track these and label them. Users with system 'Manager' access rights can create an unlimited number of 'Classifications' within 4Action+.

Classifications allow you to label your recommendations with a variety of markers which can be utilised in the search and reporting modules to filter on. It is therefore vital that some thought is given in to setting these up correctly so they can be utilised fully.

An example of classifications could be:

Source – Internal, external
Committee – Governance, Audit, IT
Department – HR, Finance, IT, Management

2.1   Creating a New Classification.

By default your organisation may have no classifications setup for you and it is therefore your responsibility to create the classifications you wish to use.

- From within the home page toolbar click on the 'Administration' link.

- The 'Administration menu' will be displayed.

- Select the 'Manage Classifications' link from the menu.

- The 'Manage Classifications' page is displayed.

Create new Classification

Classification name	Default value		
Committee	Committee	Edit Classifications	Delete Classifications
Department	Department	Edit Classifications	Delete Classifications
Source	Source	Edit Classifications	Delete Classifications

- Select 'Create new Classification'.

- The 'Creating: Classification' page is displayed.

Creating : Classifications

Name : Manager Responsible

Default value :

Add / Update Current possible values list

Current possible values :
John Smith
Alan Brown

Add new value
Update Selected
Delete Selected | Ian Philips
Set selected value as default

Save   Cancel

- Enter the name of the 'New Classification' into the 'Name' dialogue box.

- Enter the 'Possible values' in the value list dialogue box and click 'Add new value' to add them to the 'Current possible values'

Add new value
Update Selected
Delete Selected
Set selected value as default
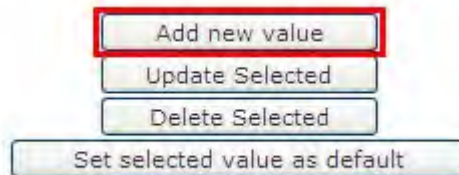
- Highlight one of the values in the 'Current possible values' and select 'Set selected value as default'

Add new value
Update Selected
Delete Selected
Set selected value as default
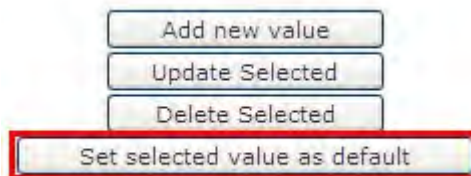
- Click on the 'Save' button to create the new classification.

2.2   Deleting a Classification

- From within the home page toolbar click on the 'Administration' link.

- Select the 'Manage Classifications' link from the menu.

- All existing classifications will be displayed.

- Click on the 'Delete Classification' link adjacent to the classification that you wish to delete.

Create new Classification

Classification name	Default value		
Committee	Committee	Edit Classifications	Delete Classifications
Department	Department	Edit Classifications	Delete Classifications
Source	Source	Edit Classifications	Delete Classifications

- The classification will be deleted

Note: Classifications can only be deleted if they are not in use. If a recommendation is currently assigned to this recommendation it must be changed before the classification can be deleted

2.3   Editing Classifications.

- From within the home page toolbar click on the 'Administration' link.

- Select the 'Manage Classifications' link from the menu.

- All existing classifications will be displayed.

- Click on the 'Edit classification' link adjacent to the classification that you wish to edit.

Create new Classification

Classification name	Default value		
Committee	Committee	Edit Classifications	Delete Classifications
Department	Department	Edit Classifications	Delete Classifications
Source	Source	Edit Classifications	Delete Classifications

- The 'Editing: Classifications' page is displayed.

Editing : Classifications

Name : Committee

Default value : Audit

Add / Update Current possible values list

Current possible values :

Audit
Governance
IT

Add new value

Update Selected

Delete Selected

Set selected value as default

Save   Cancel

- Add new values and click the 'Add new value' button

- Or, highlight the value you wish to amend and click the 'Update Selected button. This will open the value in the right hand text box for you to amend.

- Click 'Save'

3.0 Managing Users

User accounts **must** be setup for any individuals within an 'organisation' that will have responsibility for implementing and progressing recommendations.

Once you have created a user you may need to modify their details, or make them inactive. Please note that you will never delete a user, as you will want to keep a record of their historical activity in the system.
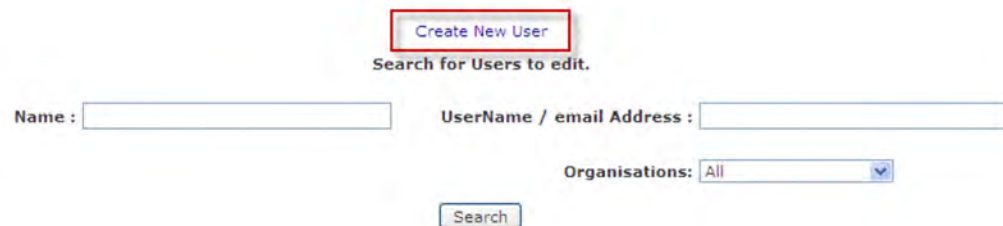
3.1 Creating a New User Account.
- From within the home page toolbar click on the 'Administration' link.

  The 'Administration menu' will be displayed.

- Select the 'Manage Users' link from the menu.

- The 'Manage Users' page is displayed.

- Click on 'Create New User'.

- The 'Create New User' page is displayed.

* These items are mandatory

* Login Name :

* Email Address :

Active : ☑

* Password :

Repeat Password :

* Name :

Line Manager : [Select User]

Telephone :

Notes :

- Enter the Login Name (this must be unique)

- Enter the Email address
  (4Action+ generates automatic Email alerts and Progress Updates. This will be the Email Address used by the system for forwarding the automatic notifications to the User)

- The system will Automatically flag the new User as 'Active'
  (Un-checking this tick box will remove all access rights for the user. The user will not be presented for selection when assigning recommendations)

- Enter a 'Password' for the new user and repeat in the following field

- Enter the Users 'Name'.

- Select a Line Manager from the system (This user can be setup to receive escalated alerts)

- Enter a telephone number for the user

- Enter any 'Notes' for the user, these 'Notes' do not appear on any reports but can be viewed by other users within the system.

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Note: Any field marked with an asterix (*) is a mandatory field and must have a value to save the record.

Once created, users must be assigned a role for each of their organisations. This allows for users to be setup with specific rights for different organisations. For example, a user may have full admin rights in a subsidiary organisation but only have basic access for a holding organisation.

- Scroll to the bottom of the page and in the drop down list select the 'Organisation' which you want to select a role for.

Note: You will only be able to view organisations to which your user account has access to.

- This will load all roles setup for that organisation in the right hand pane.

- Select the role you wish to allocate and click the '< Move' button.

- Once complete click the 'Create User' button

3.2 User Roles

By default the following Roles will be setup for you.

User Role Access Rights

User Role	User Functions
User	• Create Recommendations • View and amend Recommendations that have been assigned to them. • View and amend recommendations that they have created.
Super User	• Create Recommendations • View and Amend all Recommendations • Run Reports on all recommendations
Manager	• Create Recommendations • View and Amend all Recommendations • Run Reports on all recommendations • Manage System Users • Manage Classifications • Manage Priorities • Manage Custom Fields • Manage Progress Updates.

3.3   Searching For Existing Users.

- From within the home page toolbar click on the 'Administration' link.

- The 'Administration menu' will be displayed.

- Select the 'Manage Users' link from the menu

- The 'Manage Users' page is displayed.

Create New User
Search for Users to edit.

Name : [   ]   **UserName / email Address :** [   ]

Organisations: [All   ▼]

[Search]

- User Accounts can be searched using the following criteria.

  ▪ Name
  ▪ Username/Email Address
  ▪ Organisation

Search fields can be used individually or in combination with one another. You can also search on Partial data. i.e. If you enter Jo into the 'Name' field and click on 'Search', all users with a name containing 'Jo' would be displayed as a search result.

- Enter your 'Search' criteria.

- Click on 'Search'.

- All users matching the Search criteria entered will be displayed.

Create New User

Search for Users to edit.

Name : [   ]   UserName / email Address : [   ]

Organisations: [All   ▼]

[Search]

User Name	Login Name	
Dave Ramage	Dave Ramage	Edit
Dave Ramage1	Dave Ramage1	Edit
John Smith	John Smith	Edit
Lee Clark	Lee Clark	Edit
Phil Brown	Phil Brown	Edit

N.B Leaving the Search Fields un-populated and clicking on 'Search' will display all users

3.4   Editing Existing Users

- From within the home page toolbar click on the 'Administration' link.

- Select the 'Manage Users' link from the menu.

- Using the 'User Search' feature locate the user that you wish to edit. (Details of how to use this can be found in Section 3.3).

- Click on the 'Edit' link adjacent to the user you wish to edit.

User Name	Login Name	
Dave Ramage	Dave Ramage	Edit
Dave Ramage1	Dave Ramage1	Edit
John Smith	John Smith	Edit
Lee Clark	Lee Clark	Edit
Phil Brown	Phil Brown	Edit

- The 'Edit User' page is displayed.

* Login Name : Dave Ramage

* Email Address : dave.ramage@rsmtenon.com

Active : ☑

* Name : Dave Ramage

Line Manager : Administrator
Select User

Telephone :

Notes :

Roles :

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- The following user account fields can be edited.

  - Login Name
  - Email Address/Login Name
  - Users can be flagged as 'Inactive' by un-checking the 'Active' tick box
  - Name
  - Line Manager
  - Telephone number
  - Notes
  - User Role

- Click on the 'Update User Details' button to save the edit.

3.5   Changing a User's Password.

- From within the home page toolbar click on the 'Administration' link.

- Select the 'Manage Users' link from the menu.

- Using the 'User Search' feature locate the user to be edited.

- Click on the 'Edit' link within the User line display.

- Enter the new password into the 'New Password' dialogue box and retype in the 'Repeat Password' dialogue box to confirm.

- Click on the 'Update User Details button to save the edit.

New Password : [   ]

Repeat Password : [   ]

[Update User Details]

4.0 Managing Active Directory

Active Directory allows your organisation to setup specific users in 4Action by utilising your organisations existing network security. Therefore they will not need to login to the application, it will know who you are because you signed in to your computer.

Active Directory is only available if the system has been installed to your own infrastructure.

4.1 Adding a Domain

- From within the home page toolbar click on the 'Administration' link.

- The 'Administration menu' will be displayed.

- Select the 'Manage Active Directory' link from the menu.

- The 'Manage Active Directory' page is displayed.

Manage Active Directory

☑ Enable Active Directory

Add New Domain

Domain Name	IP Address	User Name	Import Domain			
BJBS-HGTE	10.51.10.1	alastair.bell	☑		Edit Domain	Delete Domain

☐ Show all users   Import

- All existing domains will be displayed.

- Click on the 'Add New Domain' link

Add New Domain

Domain Name : [   ]   IP Address : [   ]

User Name : [   ]   Password : [   ]

Cancel   Save

- Complete the details for the Domain Name and IP address of the main Active Directory server.

- Enter a username and password for a user which has permission to access the Active Directory structure.

- Click 'Save' to record the domain.

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3.2   Import Users from Active Directory

• From within the home page toolbar click on the 'Administration' link.

• The 'Administration menu' will be displayed.

• Select the 'Manage Active Directory' link from the menu.

• The 'Manage Active Directory' page is displayed with a list of the domains you have registered.
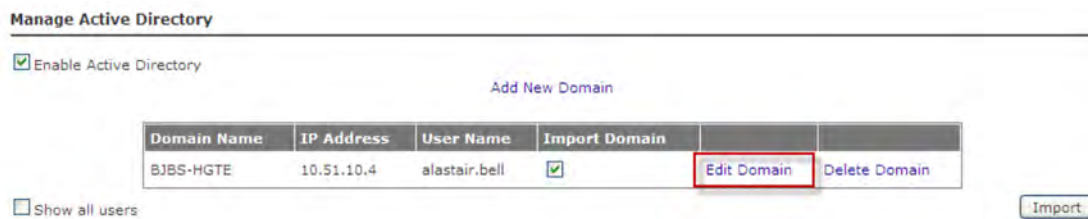
• Click Import

Domain Name	User Name	Login Name	E-mail	Phone number	Import	Never Import	Role
	Output 42	output42@bjbs.harrogate			☐	☐	No Role ▾
	TeamServerReports	TeamServerReports@bjbs.harrogate			☐	☐	No Role ▾
	VMWare User	VMUser@bjbs.harrogate			☐	☐	No Role ▾
	talia werzanski	talia.werzanski@bjbs.harrogate	t.werzanski@rsmtenon.com		☐	☐	No Role ▾
	John Abbott	john.abbott@bjbs.harrogate			☐	☐	No Role ▾
	Andrew Wilson	andrew.wilson@bjbs.harrogate			☐	☐	No Role ▾
	Guy Smithson	guy.smithson@bjbs.harrogate			☐	☐	No Role ▾
	Mark Stiles	mark.stiles@bjbs.harrogate			☐	☐	No Role ▾
	Matthew Forsyth	matthew.forsyth@bjbs.harrogate	matt.forsyth@bjbs.co.uk		☐	☐	No Role ▾
BJBS-HGTE	Oliver Cartwright	oliver.cartwright@bjbs.harrogate			☐	☐	No Role ▾
	Adrian Woodcock	adrian.woodcock@bjbs.harrogate			☐	☐	No Role ▾
	David Ramage	dave.ramage@bjbs.harrogate			☐	☐	No Role ▾

• The system will load all users within the domain you specified.

• Tick the box adjacent to the user you want to import in to the 4Action system.

• Select the 'Never import' tick box if you wish to exclude this user from future imports.

• Select a 'Role' for the user account

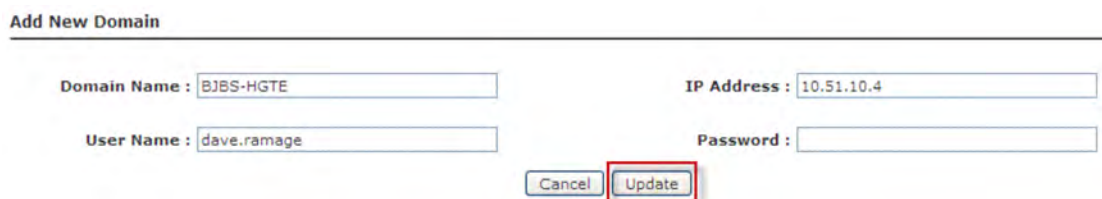• Click 'Import Selected Users' to confirm the import.

This will import the users in to the existing user database. The user details can be amended by going to the 'Manage Users' link in the 'Administration' menu.

4.3   Edit an Active Directory Domain

- From within the home page toolbar click on the 'Administration' link.

- The 'Administration menu' will be displayed.

- Select the 'Manage Active Directory' link from the menu.

- The 'Manage Active Directory' page is displayed.

- All existing domains will be displayed.

Manage Active Directory

☑ Enable Active Directory

Add New Domain

Domain Name	IP Address	User Name	Import Domain		
BJBS-HGTE	10.51.10.4	alastair.bell	☑	Edit Domain	Delete Domain

☐ Show all users   Import

- Click on the 'Edit Domain' link.

Add New Domain

Domain Name : BJBS-HGTE   IP Address : 10.51.10.4

User Name : dave.ramage   Password :

Cancel   Update

- Amend the details for the Domain Name and IP address of the main Active Directory server.

- Amend the username and password to a user which has permission to access the Active Directory.

- Click 'Save' to record the domain.

4.4   Delete an Active Directory Domain

- From within the home page toolbar click on the 'Administration' link.

- The 'Administration menu' will be displayed.

- Select the 'Manage Active Directory' link from the menu.

- The 'Manage Active Directory' page is displayed.

- All existing domains will be displayed.

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Manage Active Directory

☑ Enable Active Directory

Add New Domain

Domain Name	IP Address	User Name	Import Domain		
BJBS-HGTE	10.51.10.4	alastair.bell	☑	Edit Domain	Delete Domain

☐ Show all users

Import

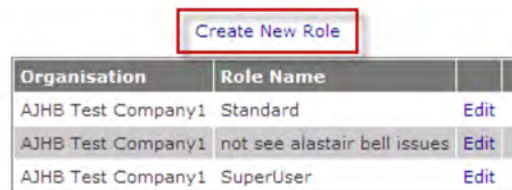- Click on the 'Delete Domain' link

- Confirm the deletion

5.0 Adding User Roles

User roles determine what access a user has to the system and it is therefore vital that these are setup to maintain the access rights of the user accounts. Once a user account has been created it must be assigned a role for each organisation that user is assigned to.

5.1 Creating a new User Role

- From within the home page toolbar click on the 'Administration' link.

- The 'Administration menu' will be displayed.

- Select the 'Manage Roles' link from the menu.

- The 'Manage Roles' page is displayed.

- Click on 'Create New Role'.

- The 'Create New Role' page is displayed.

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- Enter the Role Name (this must be unique).

- Select the options that this role will be allowed to perform using the tick boxes.

  The available options are as follows:
  - Add File – Allows users to add file attachments to the actions
  - Delete Files – Deletes the file attachments that have been added to actions.
  - Create Recommendations – Users can add more recommendations to the system within the selected organisation
  - View Recommendations – Users can view the recommendations that have been put on the system.
  - Edit Recommendations – Users can amend all fields of the recomemendation in the system
  - Create Child Recommendations – Enables recommendations in a lower hierarchy level to be added to the main recommendation
  - Add Actions – Enables users to add actions to the recommendations
  - View Actions – Users can view the actions that have been posted against the recommendation
  - Delete Actions – Users can delete the actions that have been posted to the system against the individual recommendations
  - Close Recommendations – The close recommendation option closes recommendations and notifies the owner of the recommendation of the conclusion.
  - Search All Recommendations – Search facility will be available on the user home page allowing the user to search the system for recommendations
  - Email Search Results – Enables emails to be sent to the currently assigned users of the recommendations returned in the search results
  - View Reports – The reporting module will be available to the user.
  - Manage Users – Allows the setup of new users and the maintenance of existing users
  - Manage Reports – New reports can be specified and existing ones can be deleted.
  - Manage Classificiations – Allows the classifications in the system to be edited and for new ones to be created.
  - Progress Request from Search – A progress update request can be sent to the assigned users of the returned search recommendations

- Access Dashboard – The dashboard gives a visual representation of the aging of recommendations in the system.
- Language Management – Allows users to amend the field titles so the system can be set to another language or they can amend existing descriptions in the system.
- Manage Message Templates – Email templates can be amended by the user.
- Manage Alerts – Allows the user to amend the existing alert criteria.

- Scroll down the page to the next section of setting up access rights.

- If you wish to prevent a group of users viewing recommendations that have been assigned to a higher level user, use the filter to select the user and use the 'Move' button to move the user to the left hand panel.

- This can be done where either the recommendation is assigned to that user, where that user created the recommendation, or both.

- Under 'Accessible classifications' you will see a list of all the classifications setup for your organisation. Tick the classifications you wish the user role to be able to access and un-tick those you do not.

- Click the 'Update' button to setup the user role

5.2 Editing User Roles

- From within home page toolbar click on the 'Administration' link.

- Select the 'Manage Roles' link from the menu.

- The 'Manage Roles' page is displayed.

Create New Role

Organisation	Role Name	
ABC Limited	Manager	Edit
ABC Limited	Super User	Edit
ABC Limited	Basic User	Edit

- Click on 'Edit' to the right of the role you wish to edit.

- The 'Manage Roles' page is displayed.

Role Name : [   ]

☐ Select / De-Select All
☐ Add File
☐ Delete Files
☐ Create Recommendations
☐ View Recommendations
☐ Edit Recommendations
☐ Create Child Recommendations
☐ Add Actions
☐ View Actions
☐ Delete Actions
☐ Close Recommendation
☐ Search All Recommendations
☐ Email Search Results

- Amend the values you wish to change

- Click 'Update' to save
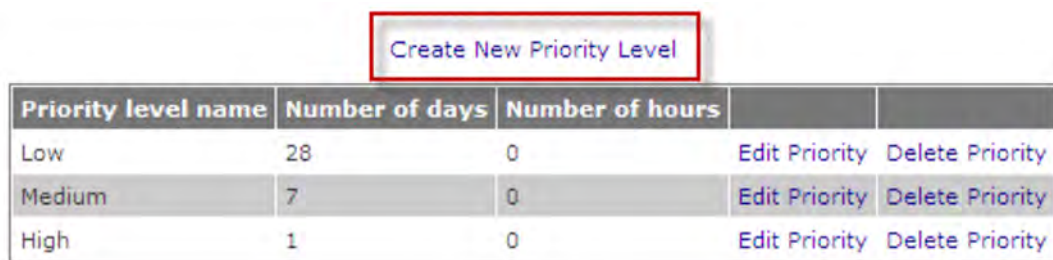
6.0   Manage Priorities

Recommendations can be prioritised so you can manage which must be dealt with first. The priorities in the system can be customised to the terminology you use.

Users with sufficient access rights can create an unlimited number of 'Priorities' within 4Action+.

6.1   Creating a New Priority.

- From within the home page toolbar click on the 'Administration' link.

- The 'Administration menu' will be displayed.

- Select the 'Manage Priorities' link from the menu.

- The 'Manage Priorities' page is displayed.

Priority level name	Number of days	Number of hours		
Low	28	0	Edit Priority	Delete Priority
Medium	7	0	Edit Priority	Delete Priority
High	1	0	Edit Priority	Delete Priority

- Select 'Create new Priority Level'.

- The 'Creating: Priorities' page is displayed.

- o Enter the name of the 'New Priority' into the 'Name' dialogue box.
- o Enter the 'number of days' in the 'Number of days' dialogue box
- o Enter the number of hours in the 'Number of hours' dialogue box

- o Click 'Save Priority' to save.

Note: the number or days and number of hours are entered so the system can prioritise the order of the list. The items will be ordered in descending order.
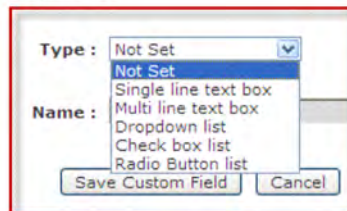
6.2 Deleting a Priority

- From within the home page toolbar click on the 'Administration' link.

- The 'Administration' page is displayed.

- Select the 'Manage Priorities' link from the menu.

- All existing priorities will be displayed.

- Click on the 'Delete Priority' link adjacent to the Priority that you wish to delete. If the Priority is not in use then it will be deleted.

Create New Priority Level

Priority level name	Number of days	Number of hours		
Low	28	0	Edit Priority	Delete Priority
Medium	7	0	Edit Priority	Delete Priority
High	1	0	Edit Priority	Delete Priority

6.3 Editing Priorities.

- From within the home page toolbar click on the 'Administration' link.

- The 'Administration' page is displayed.

- Select the 'Manage Priorities' link from the menu.

- All existing priorities will be displayed.

- Click on the 'Edit Priority' link adjacent to the classification that you wish to edit.

Create New Priority Level

Priority level name	Number of days	Number of hours		
Low	28	0	Edit Priority	Delete Priority
Medium	7	0	Edit Priority	Delete Priority
High	1	0	Edit Priority	Delete Priority

- The 'Editing: Priorities' page is displayed.

Name :	Low
Number of days :	28
Number of hours:	0

Save Priority | Cancel

- Update selected values.

- Click 'Save Priority'.

7.0   Managing Custom Fields

System administrators can create and append up-to 4 custom fields to the recommendation view. The custom fields can be of the following types:

- Single Line Text Box (up- to 255 characters)
- Multi Line Text Box
- Dropdown List
- Check Box List
- Radio Button List

These custom fields are fields which will be added to the bottom of recommendations. They are not searchable using the filters in the reporting module.

7.1   Creating a Text Input Custom Field

- From within the home page toolbar click on the 'Administration' link

- The 'Administrators menu' will be displayed.

- Select the 'Manage Custom Fields' link from the menu.

- The 4 Possible 'Custom Fields' are displayed.

Field Number	Field Name	Field Type	
1	not set	not set	edit
2	not set	not set	edit
3	not set	not set	edit
4	not set	not set	edit

- Click on 'Edit' adjacent to the field that you wish to set up.

- The 'Edit Custom Field' page is displayed.

Edit Custom Field

Custom Field Number : 1

Type : | Not Set |
Not Set
Single line text box
Multi line text box
Dropdown list
Check box list
Radio Button list

Name :

Save Custom Field | Cancel

Control Examples

Single line text box :

Note: only 255 characters are permitted in the single line text box.

Multi line text box :

Dropdown list : | Item 1 |

- From the 'Type' drop down pick list select the custom field type from the following options.

  1. Single Line Text Box. (up- to 255 characters)
  2. Multi Line Text Box.

- Enter a 'Name' for the custom field.

- Click on 'Save Custom Field'.

- The New Field will now be presented to users within the recommendation details page.

7.2   Creating a Custom Pick list Field

If you wish to create a dropdown, check box, or radio button pick list you must also create and manage the values that are presented to the users for selection.

- From within the home page toolbar click on the 'Administration' link.

- The 'Administrators menu' will be displayed.

- Select the 'Manage Custom Fields' link from the menu.

- The 4 Possible custom fields are displayed, Click on 'Edit' adjacent to the custom field that you wish to set.

- The 'Edit Custom Field' page is displayed.

- From the 'Type' drop down pick list select the custom field type from the following options.

    1. Dropdown List
    2. Check Box List
    3. Radio Button List

- The screen will change so that 'Control Values' can be setup.

Edit Custom Field

Custom Field Number : 4

Type : Dropdown list

Name :

Control Values

Add New: [   ] [Add Value]

[Move Up]

[Move Down]

[Edit Selected]

[Remove Selected]

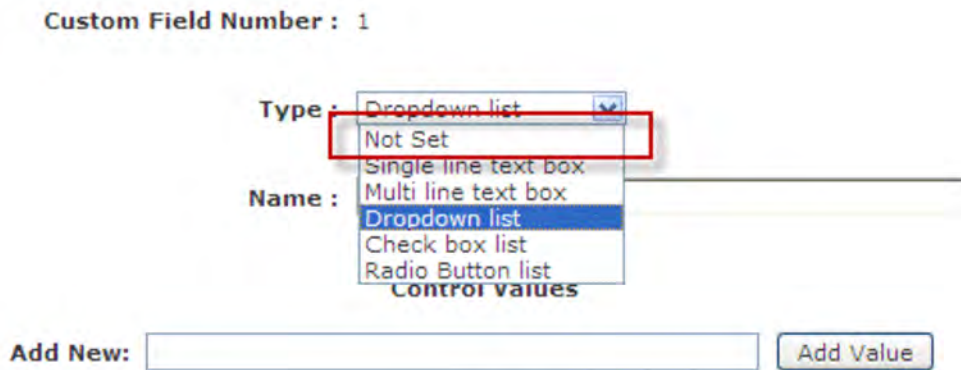[Save Custom Field] [Cancel]

Control Examples

Single line text box : [   ]
Note: only 255 characters are permitted in the single line text box.

- Enter a 'Name' for the new field.

- Type the 'Control Value', as you wish it to be presented to users, into the 'Add New' field.

Custom Field Number : 1

Type : Dropdown list

Name : Status

Control Values

Add New: Awaiting attention   [Add Value]

- Click on 'Add Value'.

- The 'Control value' is added and the 'Add New' input field becomes available for further data entry.

Control Values

Add New: [   ] [Add Value]

Awaiting attention

[Move Up]

[Move Down]

- Repeat the above process until all of the values that are to be presented to the users as options have been added.

- Click on 'Save Custom Field'.

- The new Custom pick list will be displayed within the recommendation detail screen.

7.3   Re-ordering Control Values

The order that control values are presented can be changed by system managers.

- From within the home page toolbar click on the 'Administration' tab.

- The 'Administrators menu' will be displayed.

- Select the 'Manage Custom Fields' link from the menu.

- Click on 'Edit' adjacent to the custom field that you wish to change.

Field Number	Field Name	Field Type	
1	Status	dropdown	edit
2	not set	not set	edit
3	not set	not set	edit
4	not set	not set	edit

- The 'Edit Custom Field' page is presented.

- Select the value that you wish to re-order or remove.

- To move the selected control value up the pick list click on 'Move Up'.

- To move the selected control value down the pick list click on 'Move Down'.

- Click on 'Save Custom Field'.

7.4 Editing the Selected Custom Control Value

- To edit the wording of the selected control value click on 'Edit Selected'.

- The 'Update Control Value' field will be presented.

- Enter the value as you wish it to be presented within the pick list.

- Click on 'Update Value'.

- Click on 'Save Custom Field.'

7.5   Removing the Selected Custom Control value

- To remove the control value form the presentation pick list click on 'Remove Selected'.

- The selected control value will no longer be presented for selection.

- Click on 'Save Custom Field'.

7.6   De-activating a Custom Field

- From within the home page toolbar click on the 'Administration' tab.

- The 'Administrators menu' will be displayed.

- Select the 'Manage Custom Fields' link from the menu.

- The 4 Possible fields are displayed, Click on 'Edit' adjacent to the field you wish to amend.

- The 'Edit Custom Field' page is displayed.

- Select 'Not Set' from the 'Type' drop down pick list.

Custom Field Number : 1

Type : Dropdown list
- Not Set
- Single line text box
- Multi line text box
- Dropdown list
- Check box list
- Radio Button list

Name :

Control Values

Add New: [   ] [Add Value]

- Click on 'Save Custom Field'.

- The field will no longer display to users.

8.0 The User Home Page

When a 'User' logs into the 4Action+ software the 'User Home Page' is displayed.

The User Homepage displays the Users 'Work Queue' that includes a list of those recommendations which you have created, or have been assigned to you.

As recommendations pass their target date their background colour will change to red (or pink) indicating that the target date for that recommendation has been missed. At the same time an email will be sent to the user allocated responsibility for the recommendation, alerting them to the issue and providing a link to the website to update the recommendation as appropriate.

In addition to this you are able to maintain a list of recommendations that you wish to "watch".

In the lower part of screen you will also see the search control that allows you to find any other recommendations from within your organisation, including those that have been previously closed.

The User Home Page

8.1 Using the Home Page 'Recommendation Search Tool'

All users can use the search tool but access rights, as defined in the user roles, will determine which recommendations you have access to.

Both open and closed recommendations can be searched for.

Recommendations can be searched using the following criteria.

- Recommendation Status
  Select one of the following criteria from the drop down pick list
  - All
  - Open
  - Closed.

- Reference
- Report Ref
- Assigned To
- Text
- Target Date
- Creation Date
- No update since
- Committee
- Source
- Department

N.B. All search fields can be used in isolation or in-conjunction with each other in order to construct more complex search criteria.

An Organisation must be selected otherwise no results will be returned.

- Once all of the relevant 'Search Criteria' have been entered click on the 'Search' button.

Search Recommendations

Recommendation Status :	All ▼
Reference :	
Report Ref :	
Assigned To :	
Text :	

Filter by target Date :	Start Date	End Date
	01/01/2010	31/12/2010

Filter by creation Date :	Start Date	End Date

No update since :	

Dave Test 2 ☐

Committee :	All ▼
Department :	All ▼
Source :	All ▼

Training Company ☐

Committee :	All ▼
Department :	All ▼
Source :	All ▼

[Search]

- All Recommendations matching the criteria entered will be displayed.

- To refine the Search results click on the 'New Search' link.

Search Recommendations

Your search returned 3 result.   [New Search]

☑	Reference	Summary Text	Organisation	Assigned To	Created	Target	
☑	DR/d4b3/27510	Test recommendation assigned to self	Training Company	Dave Ramage	27/05/10	31/05/10	View
☑	A/f4b3/17510	Test recommendation	Training Company	Dave Ramage1	17/05/10	25/05/10	View
☑	A/6498/19510	afe	Training Company	Dave Ramage	19/05/10	23/05/10	View

[Progress Request] [Send Mail][Export to XML]

- To View the Recommendation Details and History click on the 'View' link within the recommendation line display.

- The 'Recommendation Details and Actions are displayed.

- To View the details of 'Actions' associated with the implementation of the recommendations click on the 'View' link within the action display line.

- The 'Action' detail is displayed.

- To return to the 'Recommendation Detail's' page click on the 'Return to Issue Details' link.

8.2 Export Search Results

After running a search enquiry you can export the results by one of the following methods:

1.   Request a progress update
2.   Send email
3.   Export to XML

8.2.1 Request a Progress Update report

System managers can create a Progress Update request for any recommendations, on any basis, by utilising the search facility. For example, a progress update can be made for a specific committee by using the committee filter in the search criteria. Alternatively, you could send a progress update report only on those recommendations that have not been updated since a certain date using the 'No Update since' search criteria.

- From the Search results page select 'Progress Request'.

- The 'Request for progress update' page is displayed.

- In the lower part of the screen is a summary of the users who will be emailed with the request.

- The upper part of the screen allows you to customise the message that will be sent to the users. Enter a message for the recipients into the 'message' dialogue box using free text data entry or by pasting the data into the field.

- Click on the 'Send Request' button.

Example of progress request email

```
From:      4action@bjbs.co.uk
Date:      09 August 2010 17:30
To:        dave.ramage@rsmtenon.com
Subject:   Request for progress update.
```

Please provide a progress update for all outstanding recommendations.

8.2.2 Send email

System managers can request that an email reminder be sent to all of the currently assigned users.

- From the Search results page select 'Send email'.

- A message will be displayed showing the request has been properly actioned.

Emails have been sent for :DR/d4b3/27510;
A/f4b3/17510; A/6498/19510;

The following is an example of this email:

```
From:      4action@bjbs.co.uk
Date:      10 August 2010 11:35
To:        dave.ramage@rsmtenon.com
Subject:   Recommendation Needing Attention NOW!!!!
```

Dear User.

This is an issue reminder. You are being sent this email because an issue assigned to you may need your attention. Please action this email **as soon as possible**.

Issue ref: A/6498/19510

The Target Date of this issue is: 5/23/2010

The Summary text for this Issue is:
afe

The Details text for this issue is:
dsaf

Please visit: http://localhost/ to review and action this issue.

Thank you for your co-operation

8.2.3 Export to XML

Search results can be exported to XML files which can then be used in external packages such as excel to analyse the data and present it in a useful format.

- From the Search results page select 'Export to XML' .

- A message will be displayed asking you to confirm the type of export.

The options available for the export are as follows:

- o Export Recommendations – Only exports the recommendation detail and does not include any subsequent actions that have been added.
- o Export Recommendations and actions – Exports recommendations and all actions that have been added directly to the recommendation
- o Export Recommendations and nested actions – Exports recommendations and all actions that have been added to the recommendation or to linked recommendations.

- Select the type of export and click 'Run'.

- A message will be displayed asking if you wish to Open, Save or Cancel the operation.

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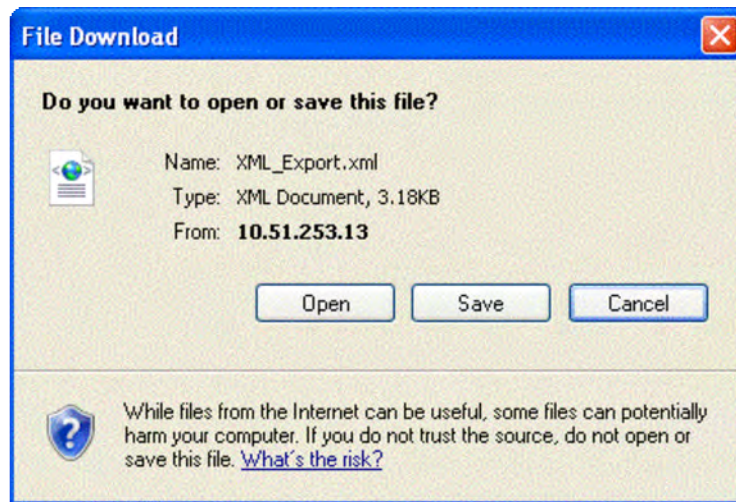
XML files are typically read in packages such as Excel or with report writing software such as Crystal Reports.

8.2.4 XML File Format

UserName	Created by user
OperatorName	Assigned to user
Ref	System reference
Summary	Summary text
IssueID	Internal system reference
LevelName	Priority
orgname	Organisation
Customer Ref	No longer in use
Detail	Detail
Status	Open/Closed
iStatus	No longer in use
ToDo	To Do
CreatedDate	Date recommendation was created
TargetDate	Target Date
Resolution	Conclusion
ContactName	Reference
ContactNumber	No longer in use
OriginalTargetDate	Target date when first entered
Committee	Not linked
ClosedStatus	Status when closing recommendation
ReportStatus	Blank
Progress	Action status
Custom1	Custom Field 1
Custom2	Custom Field 2
Custom3	Custom Field 3
Custom4	Custom Field 4
UserID	Internal User reference
Name	Name of assigned user taking action

UserID2	Internal reference
ActionSummary	Summary text of action
ActionDetail	Detail text of action
Parent_Ref	Reference of Parent recommendation
Completed Date	Date of action
Progress Date	Date field

8.3   Changing your Organisation

4Action+ allows users to belong to several organisations with the 1 unique username. This allows users to switch between organisations to manage their workload.

To change the organisation in 4Action+ click the 'Change Organisation' link in the upper right of the screen.

- Select the Organisation you wish to change to.

- Click 'Confirm Company Change'.

8.4 Spell Checking

4Action+ has a built in spell checker that will highlight any potential spelling mistakes by marking them with a yellow highlight

- To amend the spelling mistake, click on the yellow area
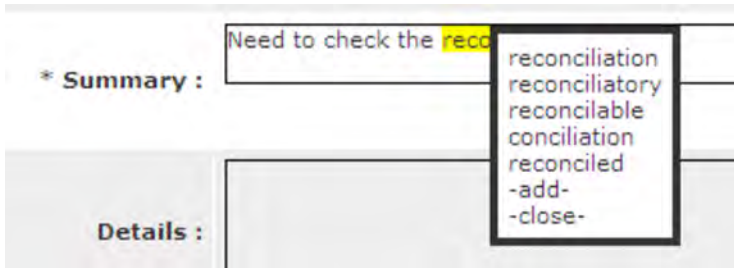
* Select the correct value or '-add-' to add it to the dictionary or '-close-' to not make any change.
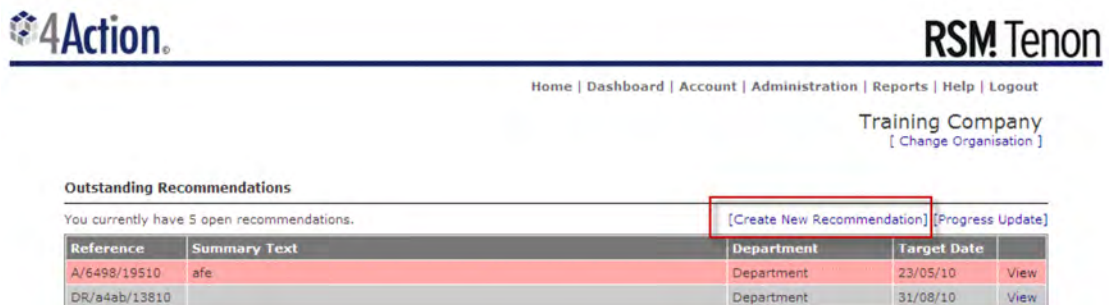
9.0　Creating a Recommendation

Modern organisations are continually changing and improving. Recommendations are agreed by management and non-executives to ensure that these changes occur and organisational objectives are achieved. To ensure that the required changes are actually achieved it is essential that your organisation keeps track of all the recommendations that have been agreed, the actions that have been taken on them and that performance against implementing them is closely monitored.

As an organisation you need the ability to collate the recommendations arising from some or all of these sources and then monitor whether these recommendations are being implemented.

9.1　Creating a New Recommendation

- From the 4Action+ home page select the 'Create New Recommendation' link.

- The 'Create New Recommendation' page is displayed.

Create New Recommendation:

* These items are mandatory

Report Ref :	
* Priority :	Please Select
* Entered on behalf of :	Dave Ramage [Select User]
* Assigned To :	[Select User]
* Target Date :	(dd/mm/yyyy)
Committee :	Audit
Department :	Department
Source :	Source
Allow the operator to close the recommendation :	☐
* Summary :	
Details :	

- Enter the following:
  - Report Ref - Using free text entry type the 'Report Ref'.

  - Priority- Recommendations can be prioritised by selecting one of the available values. (A detailed explanation of this feature and how to customise the values can be found in).

  - Entered on behalf of - To allocate ownership of the recommendation to another system user click on the 'Select User' button.

    o The 'User Search' page is displayed.

    o Enter your search criteria. Search fields can be used individually or in combination. You can also enter partial data.
    (To view all system users leave the search criteria fields Blank and click on 'Search'.)

User Name:	
Name :	
email Address :	

[Search]

o Click on 'Search'.

o All Users matching the criteria entered will be displayed.

Your search returned 5 result(s).

Name	User Name	Email Address	
Administrator	Administrator	alastair.bell@bjbs.co.uk	Select
Administrator2	Administrator2	Administrator2	Select
Dave Ramage	Dave Ramage	dave.ramage@rsmtenon.com	Select

o Click on 'Select' to 'Assign' the 'Recommendation'
(The window will close and the user name will be updated on the recommendation sheet.)

▪ Assigned to - To assign the Recommendation to a system user click on the 'Select User' button.

o The 'User Search' page is displayed.

o Enter your search criteria. Search fields can be used individually or in combination. You can also enter partial data.
(To view all system users leave the search criteria fields Blank and click on 'Search'.)

User Name: [   ]

Name : [   ]

email Address : [   ]

Search

o Click on 'Search'.

o All Users matching the criteria entered will be displayed.

Your search returned 5 result(s).

Name	User Name	Email Address	
Administrator	Administrator	alastair.bell@bjbs.co.uk	Select
Administrator2	Administrator2	Administrator2	Select
Dave Ramage	Dave Ramage	dave.ramage@rsmtenon.com	Select

o Click on 'Select' to 'Assign' the 'Recommendation'

(The window will close and the user name will be updated on the recommendation sheet.)

- Target Date - Enter a 'Target Date' for the execution of the 'Recommendation. The date can be entered manually in the format dd/mm/yyyy or can be selected from the pop-up system calendar.

- Classifications - From the drop down lists select the classification options. These fields are customised by the system administrator. (For detail on how to configure and edit these classification fields refer to Section 2 in the manual).

- Allow the operator to close the recommendation - Enter a tick in the radio button box to indicate if you allow the operators to close the recommendation. If this is not ticked, the recommendation will be returned to you on conclusion for you to approve the closure.

- Summary - Using free text data entry type in a 'Summary of the 'Recommendation' .The summary field should contain enough information to identify the recommendation without being a full commentary. This description will appear on the user home page and in search results.

- Details - Using free text data entry type in the full 'Details' of the 'Recommendation', Text can also be pasted into this field.

- To Do - Type in the details of any actions to be completed by the user to which the 'Recommendation' is assigned. Text can also be pasted into this field.

- Alert - Select an Alert type to assign to this recommendation. Alerts can be configured and customised to send at various times before and after the due date and to various people in the organisation structure. (Details of how to customise this can be found in Section 12 of the manual).

- Custom fields – Custom values that have been setup by the administrator of the system. (A detailed explanation of this feature and how to customise the values can be found in Section 7).

- Click on the 'Create Recommendation' button.

A unique reference is created for the recommendation and an email is sent to the user who the recommendation was allocated to. (Please note that

no email is sent to you if you allocate the recommendation to yourself as you will already be aware of the need for action.)

An entry will also be created in the work Queue of the selected Users home page.

Example Recommendation email notification

From: 4action@bjbs.co.uk
Date: 10 August 2010 16:10
To: alastair.bell@bjbs.co.uk
Subject: New Issue

Dear User,

You have been assigned the Issue reference: DR/d4b3/27510/1

The Priority of this issue is: High

The Target Date of this issue is: 11/08/2010

The Summary text for this Issue is:
Child Action
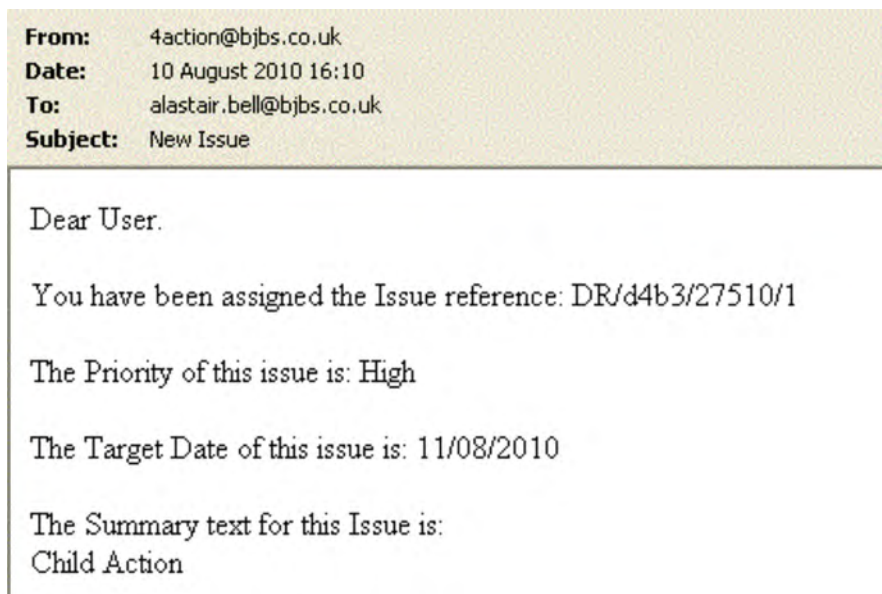
9.2   Adding a Recommendation to the Watch List

Any 'Recommendations' created by a user will be displayed within the 'User Created Recommendations' section of the home page work queue. If required 'Recommendations' can also be added to a 'Watch list' to enable closer monitoring of the progress of an assigned 'Recommendation'. This will allow the recommendation to be watched regardless of whether it is open or closed.

Note: If you do not have sufficient access rights the recommendation will disappear off your watch list if it is assigned to another user.

• From within the 'Recommendation' line display click on the 'View' link.

Outstanding Recommendations

You currently have 5 open recommendations.   [Create New Recommendation] [Progress Update]

Reference	Summary Text	Department	Target Date	
A/6498/19510	afe	Department	23/05/10	View
DR/a4ab/13810	Ensure that as soon as the restructure is completed, the authorised signatory list is updated to reflect the changes.	Department	31/08/10	View
DR/a48c/13810	Reconciliation work	Department	31/08/10	View

- The 'Recommendation' summary page is displayed.

- To add the 'Recommendation to the 'Watch List' click on the 'Add to your watch list' link.

- To return to the home page click on the 'Home' tab in the toolbar.

- The Recommendation will now be represented within the 'Watched Recommendations' section of the home page work queue.

9.3   Removing a recommendations from the Watch List

- Click on the 'View' link within the recommendation that you wish to remove from your 'Wish List'.

- The recommendation details are displayed.

- Click on 'Remove from your Watch List'.

- The recommendation is removed form your 'watch List'.

9.4   Viewing and Updating a Recommendation

Any user who has a 'Recommendation' assigned to them will receive a system generated email notification. This email contains the Summary and Detail information entered into the create recommendation screen. It also

displays a link to the 4Action+ software, enabling the user to access the recommendation by clicking onto the Link within the body of the Email.

- Click on the link within the body of the notification email.

- The 4Action+ log in screen is displayed.

- Login using the Username and Password provided.

- The 'User Home' page is displayed.

- To view the details of the 'Recommendation' click on the 'View' link within the relevant 'recommendation' line display.

Outstanding Recommendations

You currently have 5 open recommendations.   [Create New Recommendation] [Progress Update]

Reference	Summary Text	Department	Target Date	
A/6498/19510	afe	Department	23/05/10	View
DR/a4ab/13810	Ensure that as soon as the restructure is completed, the authorised signatory list is updated to reflect the changes.	Department	31/08/10	View
DR/a48c/13810	Reconciliation work	Department	31/08/10	View

- The Recommendation detail is displayed.

Reference : DR/d4b3/27510	[Remove from your watch list]

Reference :	DR/d4b3/27510
Report Ref :	Test own
Priority :	High
Committee :	Audit
Department :	Department
Source :	Source
Assigned To :	Dave Ramage
Raised By :	Dave Ramage [Details]
* Committee Date :	31/05/2010 00:00:00
Creation Date :	27/05/2010 14:46:23
Summary :	Test recommendation assigned to self
Details :	This is a recommendation that is assigned to your own user
To Do :	
Alert :	Alert 1
Status :	
Target Date :	31/05/2010 00:00:00
Conclusion :	N/A
Closure Status :	N/A

9.5   Editing Recommendation Details

- From within the 'Recommendation' details page click on the 'Edit' link.

Summary :	Test recommendation assigned to self
Details :	This is a recommendation that is assigned to your own user
To Do :	
Alert :	Alert 1
Status :	
Target Date :	31/05/2010 00:00:00
Conclusion :	N/A
Closure Status :	N/A

[Add File]

[Close Recommendation] [Create child] [Edit]

- The 'Edit Recommendation' page is displayed.

Editing Ref : DR/d4b3/27510

* These items are mandatory

Reference :	DR/d4b3/27510
Report Ref :	Test own
* Priority :	High
Committee :	Audit
Department :	Department
Source :	Source
* Assigned To :	Dave Ramage [Select User]
Raised By :	Dave Ramage[Details]
Creation Date :	27/05/2010 14:46:23
* Target Date :	31/05/2010
* Summary :	Test recommendation assigned to self
Details :	This is a recommendation that is assigned to your own user

- The following recommendation details can be edited.

    - Report Ref
    - Priority
    - Classifications
    - Assigned To
    - Target Date
    - Summary
    - Details
    - To Do
    - Alert
    - Custom Fields

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- Click on 'Save Details' to record your changes.

The 'Recommendation Details' page will redisplay showing the Edited details.

9.6   Reassigning a Recommendation to Another User.

It is possible to Re-Assign a Recommendation to another system user for actioning.

- From within the 'Recommendation Details' page click on the 'Edit' link.

- The 'Edit Recommendation' page is displayed.

- Click on the 'Assigned To: Select user' button.

- The 'Search User' page is displayed.

- Enter your 'Search' criteria.

- Click on 'Search'.

- All users matching the search criteria entered will be displayed.

- Click on the 'Select' link within the appropriates user line

- The new user will not be displayed within the 'Recommendation Details' page.

- To save the recommendation re-assignment click on 'Save Details'.
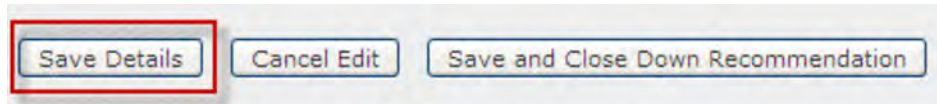
- A system generated email alert will be sent to the user to which the recommendation has been re-assigned.

- The 'recommendation' will be removed from your work queue and will now appear on the home page work queue of the user to which the recommendation has been re-assigned.

- The recommendation is updated with the details of the edit, recorded as a user 'Action'.

- The Details of the 'Action' can be viewed by clicking on the 'View' link within the action line display.

- To close the 'Viewing Actions' page click on 'Return to Issue Details'.

9.7   Creating a Child Recommendation.

For more complex recommendations it may be necessary to split a single recommendation into a number of simpler parts, each allocated to different individuals within the organisation. These "children" may then be managed in isolation.

- Select the recommendation you wish to amend and navigate to the 'Recommendation details' page by clicking the 'View' link.

- Click on the 'Create Child' link.

- The 'Create Child Recommendation' page is displayed. This is the same screen as originally creating the recommendation but fields from the parent will be pre-populated.

Create Child Recommendation ref: DR/d4b3/27510/1

These items are mandatory

Report Ref : Test own

* Priority : High

* Entered on behalf of : Dave Ramage
[Select User]

* Assigned To : Administrator
[Select User]

* Target Date : 11/08/2010 (dd/mm/yyyy)

Committee : Audit

Department : Department

Source : Source

Allow the operator to close the recommendation : ☐

* Summary :

Details :

- The following details will auto-populate from the parent 'Recommendation'. They can however be edited for the child.

  - Report Reference
  - Priority
  - Entered on behalf of
  - Assigned To
  - Classifications
  - Target date.

N.B When creating a child recommendation it is important to note that the 'Target Date' for the child recommendation should not be later that that of the parent recommendation.

- Enter a Summary for the child recommendation.

- Enter The Details of the Child Recommendation.

- Enter the details of the actions that the user is to action for the child recommendation.

- Click on the 'Create Recommendation' button.

- The user to which the child recommendation has been assigned will be notified by a system generated email notification.

- The Parent recommendations will be updated with the latest action and the Child recommendation will be displayed within the 'Children' Pane of the parent recommendation details page.

9.8   Adding an Action to a Recommendation

4Action+ provides the ability to monitor all tasks and actions undertaken during the implementation of recommendations, especially where the recommendation requires a number of distinct actions before it is complete.

- From the Home page select the recommendation you want to add an action to by clicking 'View' link.

- The 'Recommendation Detail' page is displayed.

- Click on the 'Add New Action' link

- The 'Add New Action' page is displayed.

Create New Action

Reference :	A/6498/19510
Parent :	-
Action Summary :	
Action Detail :	

Attachments

[Add File]

[Save Action] [Cancel Create Action]

- Enter an 'Action Summary' for the action.

- Enter the details of the action or task undertaken

- Click on the 'Save Action' button.

- The recommendation page is re-displayed and the action summary is added to the actions history

Actions   [Add new action]

Action Summary	Date	Action By	
Target date Changed to:21/05/2010	20/05/10	Administrator	Edit
Added an action after amending the template	27/05/10	Dave Ramage	Edit
Target date Changed to:24/05/2010	27/05/10	Dave Ramage	Edit
Recommendation re-assigned to user:Dave Ramage	27/05/10	Dave Ramage	Edit
Test Action	27/05/10	Dave Ramage1	Edit
Target date Changed to:23/05/2010	27/05/10	Dave Ramage1	Edit
Recommendation re-assigned to user:Dave Ramage1	27/05/10	Dave Ramage1	Edit
Added an action to a training recommendation	10/08/10	Dave Ramage	Edit

- The recommendations originating user will be notified of the new action by an automated email alert.

Example new action notification email.

From:	4action@bjbs.co.uk
Date:	10 August 2010 16:16
To:	
Subject:	New action added to Issue 2

User.

A new **action** has been added to the Issue with reference: A/6498/19510.

The summary of this action is:
Added an action to a training recommendation

The details of this action are:
Added more detail to it too!

Please visit: http://localhost/ to review this issue.2222

9.9   Responding to a Progress Update Request

From time to time administrators of the system may request a progress update. You will be notified of this via an email. If you receive such a request login to the 4Action software to provide detail.

- From within the 4Action+ home page click on the 'Progress Update' link

Outstanding Recommendations

You currently have 1 open recommendation.   [Create New Recommendation] [Progress Update]

Reference	Summary Text	Department	Target Date	
A/6498/19510	afe	Department	23/05/10	View

- All progress update requests for the user will be displayed.

The following items require a progress update

Reference	Summary Text	Created	Target	
DR/d4b3/27510/1	Child Action	10/08/10	11/08/10	

Update

- Enter the update details into the 'Updates' dialogue box using free text data entry.

- Click on the 'Update' button.

- An action for the response is created and displayed on the 'Recommendation Details' page.

- The details of the Update can be viewed by clicking on the 'View' link within the action line display.

- The details of the response are displayed.

- To return to the 'Recommendation Detail' page click on the 'Return to Issue Details' link.

9.10 Closing a Recommendation

When all of the required tasks and actions, taken during the implementation of the recommendation have been completed and recorded the recommendation can then be closed.

Note: Parent recommendations cannot be closed until all related child recommendations have been closed.

- From within the 4Action+ home page click on the 'View' link adjacent to the recommendation that you wish to 'Close'.

- The 'Recommendation Detail' page is displayed.

- Click on 'Close Recommendation'.

- The 'Close Recommendation' page is displayed.

Close Reference: DR/d4b3/27510/1

* Conclusion :

* Status : Fully Implemented

Save and Close Down Recommendation   Cancel

- It is mandatory to enter a 'Conclusion' to the recommendation. This will normally be a simple statement, such as "completed as requested", but may contain additional information deemed useful. It may include lessons learnt and lend itself to new requests for action.

- Select a 'Status' of 'Fully Implemented' or 'Superseded' from the 'Status' drop down pick list.

* Status : Fully Implemented
Fully Implemented
Superseded

- Click on 'Save and Close Down Recommendation'

- The following on-screen confirmation is displayed.

Reference: js/f4af/25309/2 has been closed.

- The recommendation will be removed from the users work queue.

- An email will be sent to the originating user to notify them that the recommendation has been closed. The conclusion will be displayed in this email.

- Where the recommendation is a 'Child Recommendation' an entry will be created within the action history of the parent recommendation details page, viewable by the originating user.

Actions

Action Summary	Date	Action By	
— Progress Update -10/08/2010	10/08/10	Dave Ramage	Edit
— Closed the Recommendation	10/08/10	Dave Ramage	Edit

Example Recommendation Closed email notification.

From:	4action@bjbs.co.uk
Date:	10 August 2010 16:31
To:	dave.ramage@rsmtenon.com
Subject:	Recommendation Closed

Dear User,

The Issue with reference: DR/d4b3/27510/1 has been closed.

The Summary text for this Issue is:
Child Action

The Details text for this Issue is:
must be dealt with prior to closing parent

The reason for this issue being closed is shown below:
Testing complete on child recommendations

Please visit: http://localhost/ to review this issue.

9.11 Re-opening a recommendation.

Where needed it is possible to re-open recommendations that you have closed.

- Using the recommendation 'Search' tool locate the recommendation that you wish to re-open.

- Click on the 'View' link adjacent to the recommendation that you wish to re-open.

Search Recommendations

Your search returned 2 result.   [New Search]

☑	Reference	Summary Text	Organisation	Assigned To	Created	Target	
☑	DR/d4b3/27510	Test recommendation assigned to self	Training Company	Administrator	27/05/10	11/08/10	View
☑	DR/d4b3/27510/1	Child Action	Training Company	Administrator	10/08/10	11/08/10	View

- The recommendation details are displayed.

Alert :	Alert 1
Status :	
Target Date :	11/08/2010 00:00:00
Conclusion :	Testing complete on child recommendations
Closure Status :	Fully Implemented

[Re-open]

recommendation on creation

- Click on 'Re-open'.

- The following on-screen prompt is displayed.

Re-Open Reference: DR/d4b3/27510/1

Are you sure that you want to re-open this recommendation?

Yes   No

4Action, v. 1.0.0.26, RSM Tenon;
The Hamlet, Hornbeam Park, Harrogate, HG2 8RE, Tel: (01423) 859555, Fax: (01423) 859550

- Click on 'Yes' to re-open the recommendation.

- The recommendation action audit trial will be up-dated with the user action.

Actions   [Add new action]

Action Summary	Date	Action By	
Progress Update -10/08/2010	10/08/10	Dave Ramage	Edit
Closed the Recommendation	10/08/10	Dave Ramage	Edit
Re-Opened the Recommendation	10/09/10	Dave Ramage	Edit

9.12 Adding Files
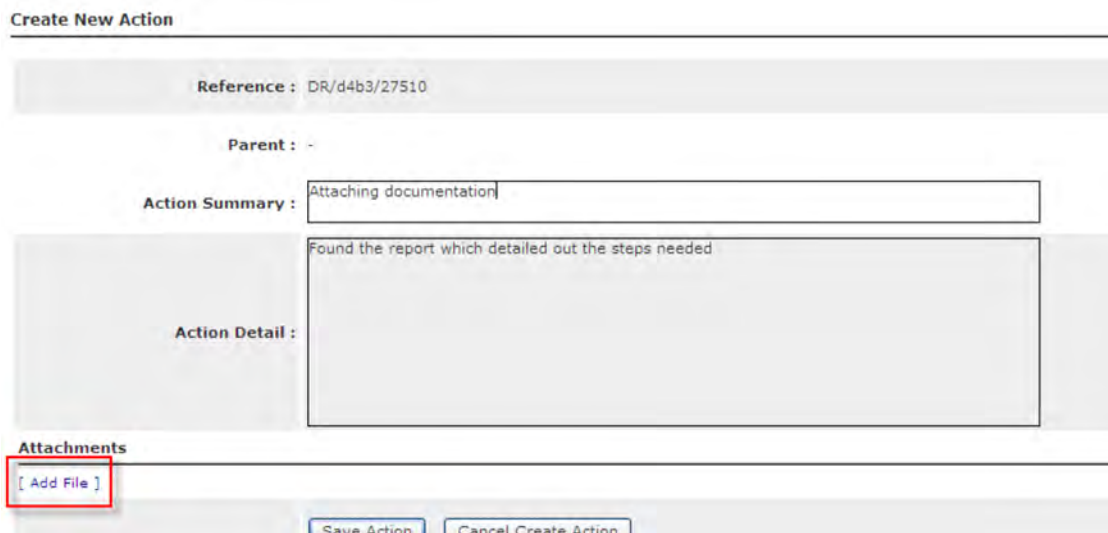
Files can be added to recommendations to provide additional reference or evidence of actions. They will be available for download by any user that views the recommendation.

Files can be added by 2 methods, either by including when adding an action or by adding directly to the recommendation.

Note: Files can not be added to closing conclusions. They must be attached to the recommendation prior to closing.
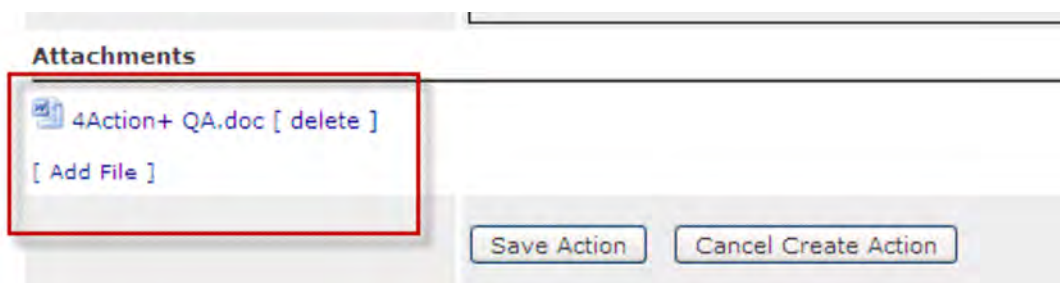
9.12.1   Adding Files to an Action

- When adding an action click the Add file button.

- An upload dialogue box will appear.

- Type in the path to the file or click the 'browse' button to navigate to the file.

- Click 'Upload'.

- The file will be listed in the attachment section of the email.

- Multiple files can be attached, if so click 'Add File' again.

- Click 'Save' to save the action.

9.12.2   Adding Files to the Recommendation

- From the recommendation view screen select the add file link.

Summary :	Test recommendation assigned to self
Details :	This is a recommendation that is assigned to your own user
To Do :	
Alert :	Alert 1
Status :	
Target Date :	11/08/2010 00:00:00
Conclusion :	N/A
Closure Status :	N/A

[Add File]

[Close Recommendation] [Create child] [Edit]

- The Add New Action dialogue box will appear to allow you to add an action with the documentation.

- Click the 'Add file' button.

Create New Action

Reference :	DR/d4b3/27510
Parent :	-
Action Summary :	Attaching documentation
Action Detail :	Found the report which detailed out the steps needed

Attachments

[Add File]

Save Action   Cancel Create Action

- An upload dialogue box will appear.

- Type in the path to the file or click the 'browse' button to navigate to the file.

- Click 'Upload'.
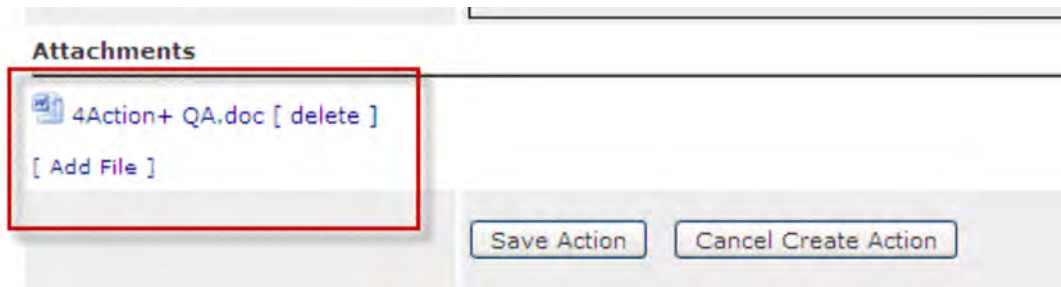
- The file will be listed in the attachment section of the email.

- Multiple files can be attached, if so click 'Add File' again.

- Click 'Save' to save the action.

9.13 Undo

4Action+ allows users to undo their last action. So if you did make a mistake the undo function allows you to undo it. It only goes back 1 step so it cannot be used to undo several actions.

After performing an action a message will be displayed in the screen.

Click the 'Undo' link to remove your last action.

10.0 The Dashboard

The dashboard is a visual means of representing the status of your organisations recommendations. It displays in an aging table the status of all recommendations, so you can get a visual representation of the progress.

- From within the home page toolbar click on the 'Dashboard' link.

- The 'Dashboard' page is displayed.

The dashboard displays a line for each companies to which you have been assigned. The bar shows the split of recommendations in to the ageing period. The periods are defined beneath the line with a numeric value to you know exactly the number of recommendations are in each period.

In the above diagram, The first Organisation has only 2 recommendations still open and both are overdue, therefore the bar is 100% red. The second organisation has a total of 10 recommendations open, 6 are overdue and are displayed in red, 1 is less than 3 days due and is displayed in orange. 1 is 2-4 weeks from due and is displayed in blue and 2 are 4+ weeks from becoming due and are displayed in turquoise.

11.0 Import Recommendations

Recommendations from 4Audit can be imported in to the system using a Word XML file that is produced from that system. This saves a significant amount of time manually entering the recommendations one by one to 4Action+.

11.1 Importing your Recommendations

- From within the home page toolbar click on the 'Administration' link.

- The 'Administration menu' will be displayed.

- Select the 'Import Recommendations' link from the menu.

- The 'Import Recommendations' page is displayed.

- Select 'Browse' to locate your file.

- Click the 'Import Recommendations' button to begin the import.

- After the import has completed the following screen will be displayed allowing you to customise the recommendations being imported.

- From here you can amend the import values and populate the fields that are not imported such as the assignee and the classifications.

- Once all values have been set, click 'Import Recommendations'.

- The following message is displayed.

Import Success

12.0   Manage Alerts

Alerts are setup by the administrator to inform users when recommendations are approaching their due date and will ensure actions are taken at the right time. They also allow an escalation to take place so if a user is not dealing with the recommendation then an alert can be sent to a manager to prompt further action.

12.1 Creating a New Alert Template.

- From within the home page toolbar click on the 'Administration' link.

- The 'Administration menu' will be displayed.

- Select the 'Manage Alerts' link from the menu.

- The 'Manage Alerts' page is displayed.

- Select 'Create New Alert'.

- The 'Create Alert' page is displayed.

- Enter the name of the 'New Alert Template' into the 'Template Name' dialogue box.

- Click 'Save'

- An additional button will appear to allow you to setup alerts within your template.

- Click the 'Add Alert' button

- Enter the following details:
  - Activates days before – Set a value for the alert to begin. E.g. 7 would start alerting 7 days before the due date.
  - Repeats every days – How often the alert repeats. E.g. 1 would repeat sending the alert every day.
  - Send to line manger – tick if you would like a duplicate alert to be sent to another user.
  - Additional Recipients – Enter the username of the person to be included in the alert.

- Click 'Save' to save the alert.

- If you wish to add more alerts to the template, select the 'Add Alert' button again and repeat the process.

- Click on the 'Save' button to save the alert.

Note: Several alerts can be setup per template. This allows you to send different alerts at different periods and potentially to the line manager.

For example, send a notification that starts at 28 days before the due date and repeats every 7 days but in the last 3 days an alert is sent out that includes the line manager. This is illustrated below:

12.2 Deleting an Alert Template

- From within the home page toolbar click on the 'Administration' link.

- Select the 'Manage Alerts' link from the menu.

- All existing alert templates will be displayed.

- Click on the 'Remove' link adjacent to the template that you wish to delete

12.3 Editing Alert Templates

- From within the home page toolbar click on the 'Administration' link.

- Select the 'Manage Alerts' link from the menu.

- All existing alert templates will be displayed.

- Click on the 'Edit' link adjacent to the template that you wish to edit

- The 'Edit Alert' page is displayed

Edit Alert

- Click 'Edit' on the Alert you wish to edit.

- Add new values or update selected values.

- Click 'Save'.

13.0 Layout Import

Layouts can be changed within 4Action to allow organisations to customise the look and feel of the software.

Layout files used are RESX (.NET Managed Resources File) and can be edited using programs such as Microsoft Visual Studio.

13.1 Importing a Layout File

- From within the home page toolbar click on the 'Administration' link.

- The 'Administration menu' will be displayed.

- Select the 'Layout Import' link from the menu.

- The 'Layout Import' page is displayed.

Import Layout

ZIP file : [   ] Browse...

[Import New layout]

- Click on the 'Browse' button to locate your file.

- Click the 'Import New layout' button to begin the import.

- After a short moment the following message will be displayed to confirm the import was successful.

Import a new layout has been finished successful. Please find a new layout file 'ImgCustom.ddr' on the 'Edit Organisation' page.

13.2 Selecting the Layout File for your Organisation

- From within the home page toolbar click on the 'Administration' link.

- The 'Administration menu' will be displayed.

- Click on the 'Manage Organisations' link in the menu.

- The Manage Organisations page is displayed.

- Select 'Edit' adjacent to the Organisation you wish to amend.

- In the 'Editing Organisation' use the dropdown menu under 'Template/Theme' to select the new layout you imported.

- Click 'Save Organisation Details' to save.

14.0 Manage Message Templates

Message Templates are the templates 4Action+ uses for sending email notifications to users. These templates can be customised by users with sufficient access rights.

- From within the home page toolbar click on the 'Administration' link.

- The 'Administration menu' will be displayed.

- Select the 'Message Templates' link from the menu.

- The 'Manage Email Templates' page is displayed.

- Click on the 'Edit' link adjacent to the template that you wish to edit.

- The 'Template' page is displayed.
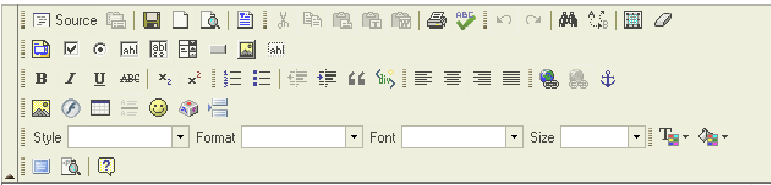
- Enter a Subject that will appear in the email subject line in the 'Subject' field.

- Amend the body of the email using the free text area and the tools for formatting the email.

- Click 'Save' to save the email format.

15.0 Edit Language

4Action+ has been designed as an English language software application but all fields in the system can be customised and amended allowing an administrative user to amend these to another language.

- From within the home page toolbar click on the 'Administration' link.

- The 'Administration menu' will be displayed.

- Select the 'Edit Language' link from the menu.

- The 'Language Edit' page is displayed.

- Amend each of the values you wish to change to the new value.

- Click 'Save' to save the language settings.

16.0 Generating Reports.

Detailed Reports can be generated for all recommendations using customisable filters within the system. These reports can be generated as a PDF or a MS Word Document, which can be viewed or saved to disc for later viewing or emailing.

- From the Home Page select the 'Reports' link.

- The 'Generate Reports page is displayed.

Report Name	
Detailed report	View Report
Detailed report with actions	View Report
Summary report	View Report

- The following reports are available by default.

  - Detailed Report – a list of all recommendations.
  - Detailed Report with actions – a list of all recommendations together with the actions taken on them.
  - Summary Report – a brief report showing total recommendations.

16.1 Generating a Report.

- Click on the 'View Report' link adjacent to the report you wish to run.

Generating report: Detailed report

Recommendation Status : [All ▾]

Priority : [▾]

Reference : [_____]

Report Ref : [_____]

Assigned To : [_____ ▾]

Text : [_____]

Filter by target Date : Start Date [_____] 📅 ☐ Today   End Date [_____] 📅 ☐ Today

Filter by creation Date : Start Date [_____] 📅 ☐ Today   End Date [_____] 📅 ☐ Today

No update since : [_____] 📅 ☐ Today

Committee [All ▾]

Department [All ▾]

Source [All ▾]

Group By [Reference : ▾]

Sort Direction [Ascending ▾]

[PDF] [W]

[Save Current Parameters]

- The above report parameters screen is displayed.

- Various options can be selected that will allow any variation of recommendations to be displayed. A detailed description of the criteria is as follows:

  - Recommendation Status – Select whether the report displays open, closed or all recommendations.
  - Reference – Sort to only display recommendations with this reference.
  - Report Ref – Sort to only display recommendations with this report reference.
  - Assigned to – Display only recommendations assigned to a specific user.
  - Text – Display only recommendations that have text matching the criteria.
  - Filter by Target Date – Show only recommendations that have a target date between the two values.
  - Creation Date – Show only recommendations that were created between the two values.
  - No Update Since – Show recommendations that have not had actions since this criteria date.
  - Classifications – The classifications that were defined in Section 2.

- Group by – The report can be grouped by Reference, Recommendation status, Assigned to or any of the classifications.
- Sort Direction – choose if you want the report ordered in ascending or descending order.

NB: With date fields use the 'Today' tick box if you want to use todays date. This is essential for when creating saves report parameters for use later.

- Once the criteria has been set, click the PDF or Word icon to generate the report.


16.2 Saving Report Parameters

After specifying a detailed parameter you can save the criteria you have set so you can easily access the same report in the future. These will form your saved reports in the system.

For example, you can setup a parameter for all open recommendations and save it as outstanding recommendations. Or you can setup a report showing where the target date has expired, thus allowing you to set up an overdue recommendation report.

- Setup your reporting parameters as per Section 16.1.

- Click on the 'Save Current Parameters' button.

Save Current Parameters

- The following on screen prompt is displayed.
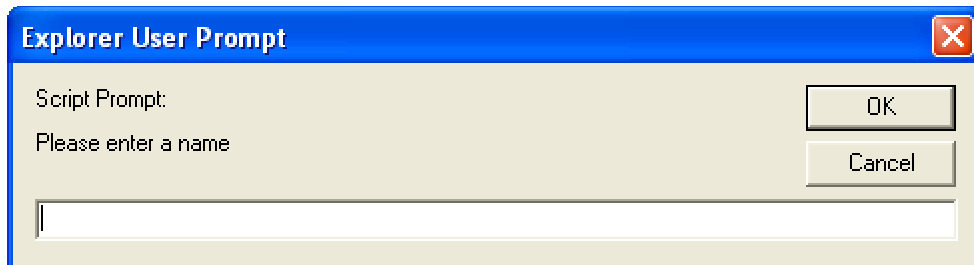
- Specify a 'Name' for your report.

- Click on 'OK'.

- The saved parameters will now be displayed under the parameter selection area.

Saved Report Parameters

Saved Report Parameters			
Open Recommendations for User: Administrator	Load Parameters	Export	Delete

- In the future, just click to load the parameters to run your report.