



Taters Enterprises, Incorporated

User Manual

Performance Monitoring System Core
(PMS Core)

Administrator's User Guide



Acknowledgements

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Table of Contents

Introduction.....	6
1. Login	7
1.1 Entering your username and password.....	7
1.2 Setting your login method preference	7
1.2.1 Always ask for my username and password	7
1.2.2 Save my username	7
1.2.3 Auto login until I logout explicitly	8
2. PMS Core User Interface.....	10
2.1 Navigating Through Records.....	11
2.1.1 View	11
2.1.2 Edit	12
2.1.3 Copy	13
2.2 Adding/Deleting Records.....	14
2.2.1 Add Record.....	14
2.2.2 Delete Selected User(s)/ Record(s)	15
2.3 Browsing Through Pages	16
2.3.1 Start / End / Previous / Next Page	16
2.3.2 Record Number	16
2.3.3 Page Number.....	16
2.4 Search Function.....	16
2.4.1 Search by: Exact phrase	16
2.4.2 Search by: All words	17
2.4.3 Search by: Any word	17
2.4.4 Search by: Show all	17
2.5 Export Options	17
2.5.1 Print	17
2.5.2 Export: HTML (.html)	18
2.5.3 Export: Excel (.xls)	18
2.5.4 Export: Word (.doc)	19



2.5.5 Export: XML (.xml)	19
2.5.6 Export: CSV (.csv)	20
2.6 Side Navigation	21
2.6.1 Announce.....	22
2.6.2 Area	23
2.6.3 Categories.....	23
2.6.4 Checklist	24
2.6.5 Deviation	25
2.6.6 Employee.....	26
2.6.7 Notes.....	28
2.6.8 Question	28
2.6.9 Role	29
2.6.10 Session.....	30
2.6.11 Store	31
2.6.12 Suggestion	32
2.6.13 Survey.....	33
2.6.14 TE Plan	34
2.6.15 TE Plan Item	35
2.7 Logout	36
2.8 Direct Link to Instant Messenger.....	Error! Bookmark not defined.
3. Help.....	Error! Bookmark not defined.
4. HTML Reserved Characters	Error! Bookmark not defined.



Table of Figures

Fig. 01 login page.....	8
Fig. 02 login message error.....	9
Fig. 03 login message error 2.....	9
Fig. 04 TEI Performance Monitoring System Admin Panel.....	10
Fig. 05 view record.....	11
Fig. 06 edit record	12
Fig. 06 copy record.....	13
Fig. 07 add error message.....	14
Fig. 08 delete user/record error message.....	15
Fig. 09 delete user/record confirmation.....	15
Fig. 10 download as .xls file	18
Fig. 11 download as .doc file.....	19
Fig. 12 download as .xml file	20
Fig. 13 download as .csv file	20
Fig. 14 side navigation.....	21
Fig. 15 view announcement	22
Fig. 16 view area.....	23
Fig. 18 view checklist	25
Fig. 19 view deviation.....	26
Fig. 20 view employee	27
Fig. 21 view note.....	28
Fig. 22 view question.....	29
Fig. 23 view role	30
Fig. 24 view session.....	30
Fig. 25 view store	31
Fig. 26 view suggestion.....	32
Fig. 27 view survey.....	33
Fig. 28 view te plan	34
Fig. 29 view te plan item	35



Introduction

Performance Monitoring System (PMS) is for Taters Enterprises, Incorporated -- franchisor of the Taters Snack League fast-food chain. The main purpose of this system is to automate and organize timely checklists, documents, forms, and various files that are crucial to the company's business processes.

The administration panel of the PMS is its core application. The *Performance Monitoring System Core* provides access to administrative functions that control all data gathered from the PMS. The PMS Core gives administrators full control and flexible navigation through crucial records from all Taters branches such as announcements, areas, categories, checklists, deviations, employee information, notes, roles, questions, TE plans, etc.

This user manual will guide you step by step on how to use this newly built application and will let you discover how incredibly easy it is to manage great amounts of data in minutes. You will never feel tired and over worked with reports ever again. You will also feel confident and will be able to establish trust within your employees; this system enables you to track and compare employees' performance and stores' performance with just clicks away. With a very friendly user interface, any Taters employee will quickly adapt with this new environment.



PMS Core

1. Login

1.1 Entering your username and password

When logging in the PMS Core, please enter your username, password and choose one of the three login settings available to assist you in the process.

If you are using your account for the first time, you can use the individually predefined account credentials made for each TEI employee.

Username: The beginning letter of your first name and your whole last name.

Password: *masterkey*

Example: Username: bmendoza

Password: masterkey

1.2 Setting your login method preference

You can log in to the Performance Monitoring System Core in several ways.

1.2.1 Always ask for my username and password

If you want to enter your account credentials every time you login, choose the “*Always ask for my username and password*” login preference.

1.2.2 Save my username

If you only want to enter your password every time you login, choose the “*Save my username*” login preference.



1.2.3 Auto login until I logout explicitly

After your first log in, if you want your account remain logged in, choose the "Auto login until I logout explicitly" preference. Note that in choosing this preference, you should not log out your account. Close the browser and it will be logged in the next time you visit the records. This login method preference is only advisable if the user has a secure account.

Fig. 01 login page

Administrator

User Name

Password

☐ Auto login until I logout explicitly

☐ Save my user name

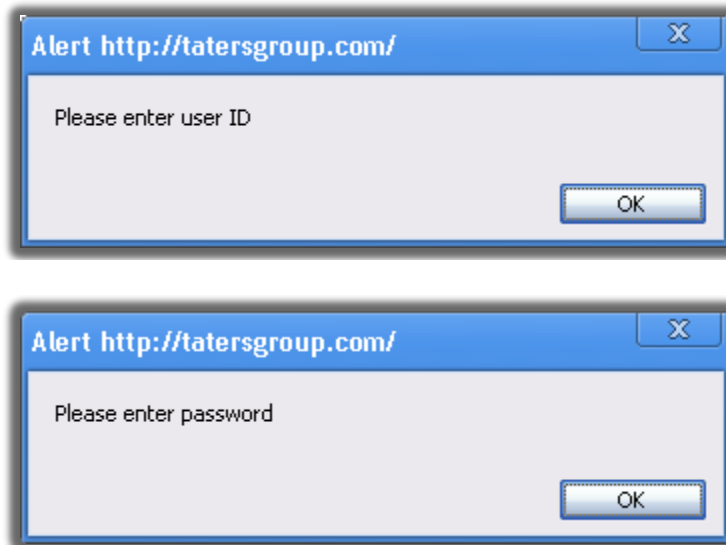
☒ Always ask for my user name and password

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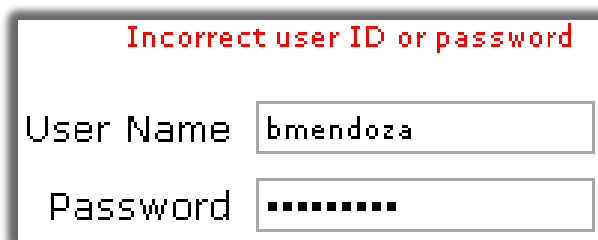
When trying to access your account, there are errors that might occur preventing you from logging in successfully.

Fig. 02 login message error 1



Entering incomplete account credentials

Fig. 03 login message error 2



Entering incorrect username and/or password

2. PMS Core User Interface

These are the functions that are common to all pages. It will be helpful to know how to use them to be able to browse through and utilize the system more effectively.

Fig. 04 TEI Performance Monitoring System Admin Panel

Area List

Print HTML Excel Word XML CSV export to csv

Search

Show all Search (*)

Exact phrase All words Any word

area ID	area Code (*)	area Desc (*)	area Comment (*)
12	Area02	Operations	Operations
13	Area03	Customer Service	Customer Service
14	Area04	Order-Taking Service Process	Order-Taking Service Process
10	Area01	Personnel	Personnel
15	Area05	Cashiering	Cashiering
16	Area06	Sanitation and Food Safety	Sanitation and Food Safety
17	Area07	Equipment and Food Process	Equipment and Food Process
18	Area08	TQM	Total Quality Management
19	Area09	Others	Others

Page 1 of 1 Records 1 to 9 of 9

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2.1 Navigating Through Records







2.1.1 View





This functionality lets you view individual records showing information such as id's, descriptions, etc. You can also add, edit, copy, delete, and navigate through pages.

Fig. 05 view record



Page   13   of 14

store ID	12
Employee emp ID	12
store Code	TEI HO
store Business Name	Taters Enterprises, Inc.
store Branch Name	Taters Head Office
store Unit	Suites 2002-2005, 2009
store Mall	Cityland, Pasong Tamo Tower
store City	2210 Chino Roces Ave., Makati City
store Manager	Ana Maria C. Tanchanco


Page   13   of 14



2.1.2 Edit

If you need to change any information about an account, you may do so by using this edit functionality. After editing the necessary account information, click the 'Edit button' and the records will automatically update and reflect the changes made. Click the 'Return icon' if you want to go back the index page.

Fig. 06 edit record



store ID	12
Employee emp ID *	<input type="text" value="12"/>
store Code *	<input type="text" value="TEI HO"/>
store Business Name *	<input type="text" value="Taters Enterprises, Inc."/>
store Branch Name *	<input type="text" value="Taters Head Office"/>
store Unit *	<input type="text" value="Suites 2002-2005, 2009"/>
store Mall *	<input type="text" value="Cityland, Pasong Tamo Tower"/>
store City *	<input type="text" value="2210 Chino Roces Ave., Makati"/>
store Manager *	<input type="text" value="Ana Maria C. Tanchanco"/>



2.1.3 Copy

If you need to duplicate a record or need to copy certain values of a record you can do so by using the Copy function. The values will be opened in textboxes, in this way you can copy the values, or edit the values and then add as a new record. Be sure to complete all required fields before adding this duplicate/edited record.

Fig. 06 copy record

Employee emp ID *	12
store Code *	TEI HO
store Business Name *	Taters Enterprises, Inc.
store Branch Name *	Taters Head Office
store Unit *	Suites 2002-2005, 2009
store Mall *	Cityland, Pasong Tamo Tower
store City *	2210 Chino Roces Ave., Makati
store Manager *	--

Add



2.2 Adding/Deleting Records



2.2.1 Add Record

Add Record lets you insert values in the database. To do this, simply click the 'Add Record icon' and fill up the table with corresponding values. Specify the values needed to complete the record you want to add. Once you have ensured the correct values in the specified fields, click the 'Add button' and the records will automatically append and reflect the changes made. Click the



'Return icon' if you want to go back the control panel.

If you look at the items to be filled in, you will notice that there are field containing asterisks (*) indicating what entries are required before submitting the form. Leaving it blank will produce an error which looks like this:

Fig. 07 add error message

The screenshot displays a web form for adding a record. The form fields are as follows:

Field	Value
Employee emp ID *	12
store Code *	TEI
store Business Name *	Tate
store Branch Name *	Tate
store Unit *	Suites 2002-2005, 2009
store Mall *	Cityland, Pasong Tamo Tower
store City *	2210 Chino Roces Ave., Makati
store Manager *	--

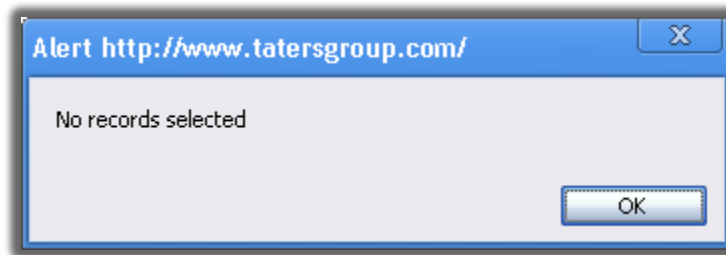
An error message dialog box is overlaid on the form, titled "Alert http://www.tatersgroup.com/". The message reads: "Please enter required field - store Manager". An arrow points from the "store Manager" dropdown menu to the error message. The "Add" button is located at the bottom of the form.



2.2.2 Delete Selected User(s)/ Record(s)

Delete Selected User(s)/ Record(s) lets you remove values from the database. To do this, simply choose the record you want to delete and click the 'Delete Selected User(s)/ Record(s) icon'. To indicate what record, click the checkbox of the corresponding record(s) you want to delete. The system will notify you if you have not selected any values yet.

Fig. 08 delete user/record error message



If the record you want to delete is properly indicated, click the 'Delete Selected User(s)/ Record(s)' icon and then the confirmation message will appear which looks like this:

Fig. 09 delete user/record confirmation



If you clicked the 'OK' button, the system will execute your request and the records will automatically append and reflect the changes made.



2.3 Browsing Through Pages

2.3.1 Start / End / Previous / Next Page

Start/End/Previous/Next Page is for browsing the pages of which the records are shown. The records stored and queried are all reflected in tables divided into pages. To browse smoothly through these records, use the Start/End/Previous/Next Page functionality. Simply click on the right arrow head icon to go to the next page, the left arrow head icon to go back to the previous page, the tipped left arrow head icon to jump to the first page, and the tipped right arrow head icon to go straight to the last page of records.

2.3.2 Record Number

Records 1 to 10 of 297

This functionality shows the record number assigned to each chat log in the database. It shows the range of record numbers currently shown in the page.

2.3.3 Page Number



The *Page Number* lets you manually type the page you want to view while browsing through the records.



2.4 Search Function

For easier navigation, the Performance Monitoring System Core provides a search function for querying values stored in the PMS Core database. Notice that 'Search (*) button' has an asterisk. This means that it will only query the table values with an asterisk (*) as well.

☒ Exact phrase

2.4.1 Search by: Exact phrase

If you need to search for exact values, choose the "Exact phrase" search option by which the database will output the records with only the exact values matched with what you have typed.



☒ All words

2.4.2 Search by: All words

If you need to search for values but you don't know the exact word/phrase, choose the "All words" search option by which the database will output all the records with values matched some or all words that you have typed in the search box.

☒ Any word

2.4.3 Search by: Any word

If you need to search for values but you don't know the exact word/phrase of it, you may opt to type in any word, character or letter that belong to the phrase you are looking for. The system will output all values stored in the database that contains that word, character or letter.

[Show all](#)

2.4.4 Search by: Show all

By selecting the "Show all" search option, the database will output all the information belonging to the side navigation panel that you have chosen.

Just enter the word(s) in the search field next to the search button and choose from one of the four categories described above.

2.5 Export Options



2.5.1 Print

The Print option lets you print information directly from the browser. Click the 'Print icon' and the information you chose will appear in printable format. After this, click File >Print (ctrl+P) from the browser, the Print window will appear. Fill in the necessary print file properties and the file is ready for printing.



2.5.2 Export: HTML (.html)

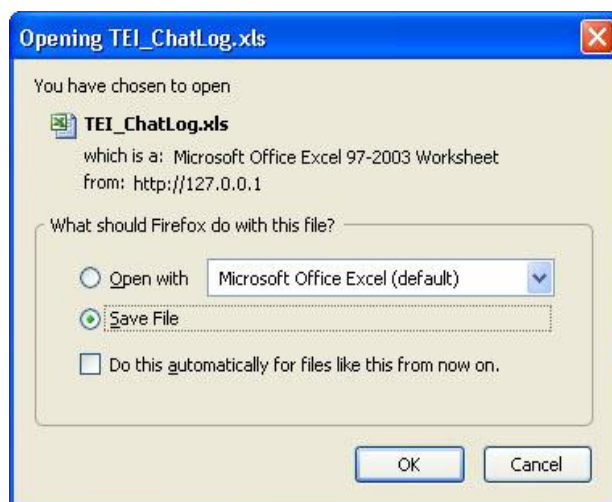
The Export: HTML option lets you export the information from the browser in html format. Click the 'Export: HTML icon' and the information you chose will appear in the html print format. After this, click File > Save page as (ctrl+S) from the browser, the Save as window will appear. Save the file as type "Web page, complete".



2.5.3 Export: Excel (.xls)

The Export: Excel option lets you export the information from the browser in excel format. Click the 'Export: Excel icon' and the Opening [document name.xls] window will appear. Choose from the downloading preferences and the information you chose will be opened/downloaded in excel format.

Fig. 10 download as .xls file

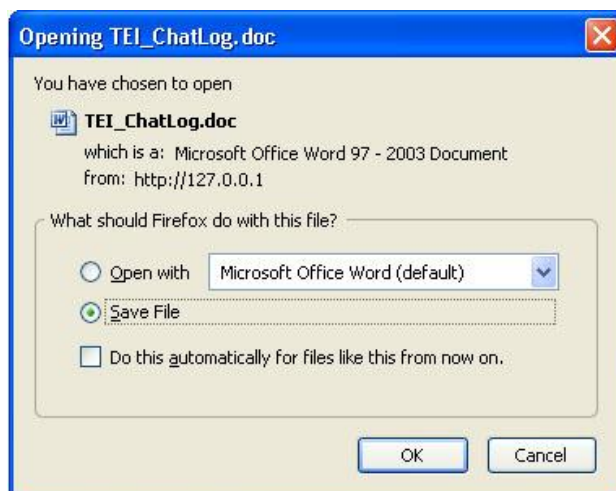




2.5.4 Export: Word (.doc)

The Export: Word option lets you export the information from the browser in word format. Click the 'Export: Word icon' and the Opening [document name.doc] window will appear. Choose from the downloading preferences and the information you chose will be opened/downloaded in word format.

Fig. 11 download as .doc file



2.5.5 Export: XML (.xml)

The Export: XML option lets you export the information from the browser in xml format. Click the 'Export: XML icon' and the Opening [document name.xml] window will appear. Choose from the downloading preferences and the information will be opened/ downloaded in xml format.



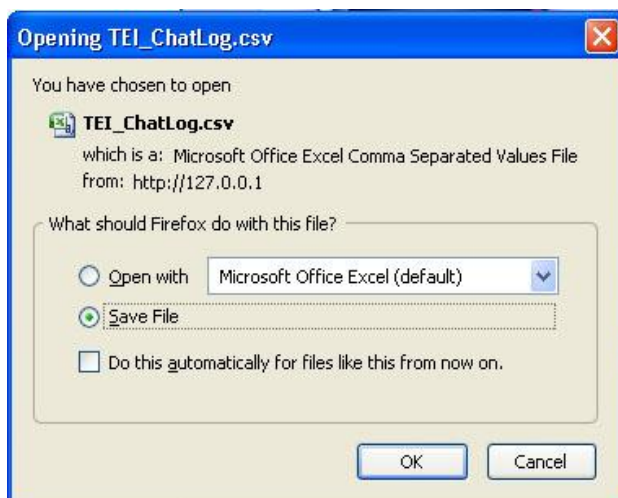
Fig. 12 download as .xml file



2.5.6 Export: CSV (.csv)

The Export: CSV option lets you export the information from the browser in csv format. Click the 'Export: CSV icon' and the Opening [document name.csv] window will appear. Choose from the downloading preferences and the information will be opened/ downloaded in csv format.

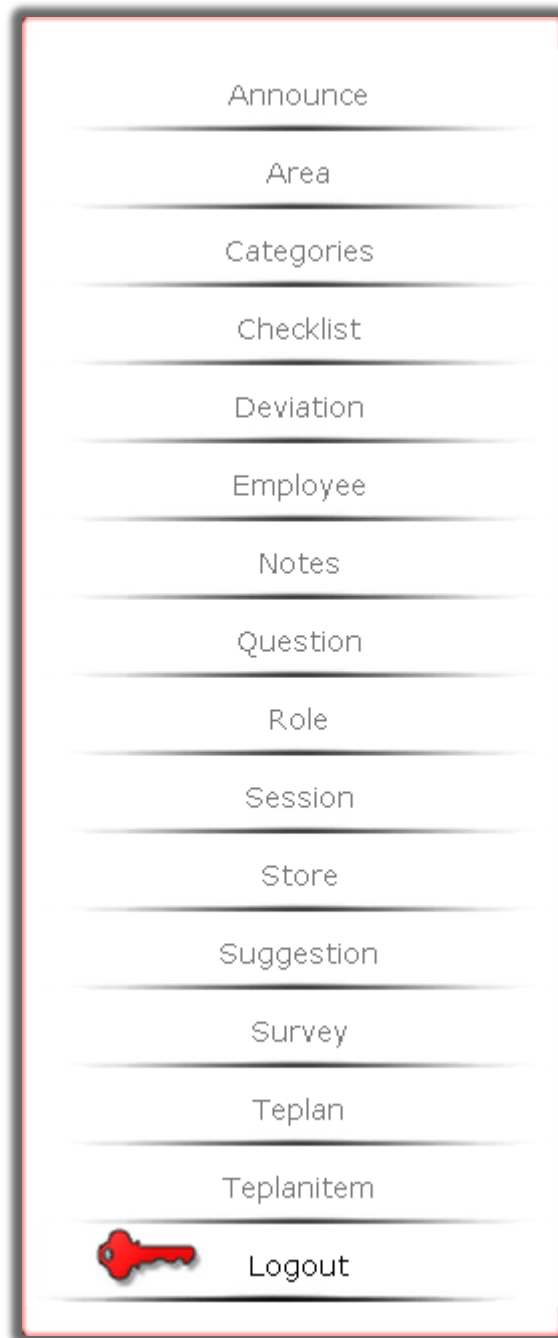
Fig. 13 download as .csv file





2.6 Side Navigation

Fig. 14 side navigation





2.6.1 Announce

This page shows a list of information regarding all announcements stored in the database such as *announcement id*, *store*, *username* and *date*. Click the ☐ (checkbox) to ☒ (mark) the announcement you want to edit. Choose one of the editing tools ([view](#), [add](#), [delete](#), [copy](#), or [edit](#)) then save the changes after. If


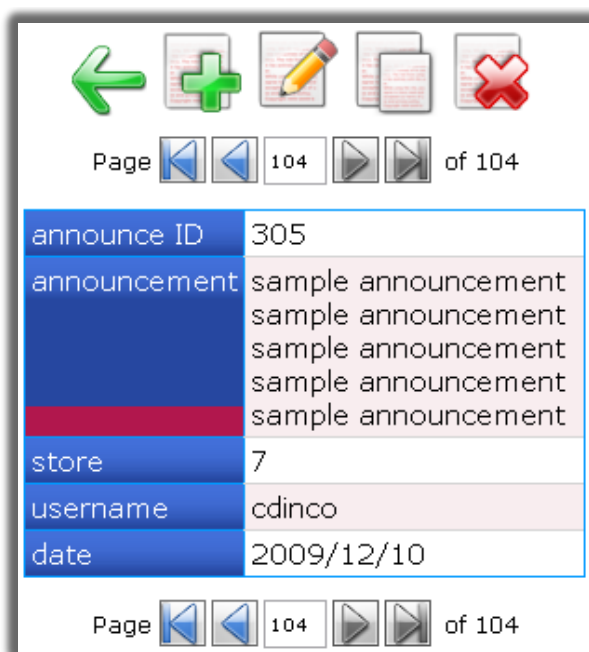
you want to view the announcement itself, simply click  and you will be redirected to the individual entry. Here you will find more details regarding this entry.

Fig. 15 view announcement



announce ID	305
announcement	sample announcement sample announcement sample announcement sample announcement sample announcement
store	7
username	cdinco
date	2009/12/10

You can choose to edit information individually. You can [add](#), [delete](#), [edit](#), and [copy](#) details from here as well.

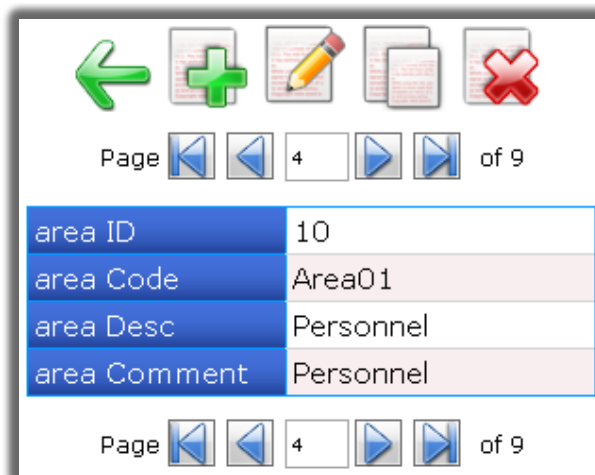


2.6.2 Area

This page shows a list of information regarding all areas stored in the database such *area id*, *area code*, *area description* and *area comment*. Click the ☐ (checkbox) to ☒ (mark) the area you want to edit. Choose one of the editing tools ([view](#), [add](#), [delete](#), [copy](#), or [edit](#)) then save the changes after. If you want to view the

area itself, simply click  and you will be redirected to the individual entry.

Fig. 16 view area



You can choose to edit information individually. You can [add](#), [delete](#), [edit](#), and [copy](#) details from here as well.

2.6.3 Categories

This page shows a list of information regarding all categories stored in the database such as *category name*, *checklist id*, *store*, *username* and *date*. Click the ☐ (checkbox) to ☒ (mark) the category you want to edit. Choose one of the editing tools ([view](#), [add](#), [delete](#), [copy](#), or [edit](#)) then save the changes after. If you want


to view the *category* itself, simply click  and you will be redirected to the individual entry. Here you will find more details regarding this entry.



Fig. 17 view category

category ID	21
category Name	Positive Impression
checklist ID	24
category Desc	
icon	teologo.png

You can choose to edit information individually. You can [add](#), [delete](#), [edit](#), and [copy](#) details from here as well.

2.6.4 Checklist

This page shows a list of information regarding all checklists stored in the database such as *checklist id*, *store*, *username* and *date*. Click the ☐ (checkbox) to ☒ (mark) the *checklist* you want to edit. Choose one of the editing tools ([view](#), [add](#), [delete](#), [copy](#), or [edit](#)) then save the changes after. If you want to view the *checklist* itself,


simply click  and you will be redirected to the individual entry.




Fig. 18 view checklist

checklist ID	5
checklist Name	Hygiene and Uniform Checklist
checklist Code	Chklst001
checklist Desc	
area ID	10

You can choose to edit information individually. You can [add](#), [delete](#), [edit](#), and [copy](#) details from here as well.

2.6.5 Deviation

This page shows a list of information regarding all checklist deviations stored in the database such as *deviation id*, *survey id*, *question id*, *user*, *date*, *store id*, *area id*, *checklist id*, *person*

responsible. Click the ☐ (checkbox) to  (mark) the deviation you want to edit. Choose one of the editing tools ([view](#), [delete](#), or [edit](#)) then save the changes after. If you want to view the deviation


itself, simply click  and you will be redirected to the individual entry.



Fig. 19 view deviation

deviation ID	657
survey ID	141
question ID	69
user	teststorecrew
date	2009/12/01
store ID	2
area ID	10
checklist ID	5
responsible	

You can choose to edit information individually. You can only [delete](#) and [edit](#) details from here.

2.6.6 Employee

This page shows a list of information regarding all employees stored in the database such as *emp id*, *username*, *email*, *fname*, *lname*, *gender*, *store*, and *role*. Click the ☐ (checkbox) to ☒ (mark) the employee you want to edit. Choose one of the editing tools ([view](#), [add](#), [delete](#), [copy](#), or [edit](#)) then save the changes after. If you want

to view the employee itself, simply click  and you will be redirected to the individual entry.



Fig. 20 view employee


Page   2   of 2

type	0
emp ID	110
username	bmendoza
password	9c479ea8aa6401ae5b24c01e317cd075
email	bamendoza@apc.edu.ph
f Name	Bryan Roy
l Name	Mendoza
m Name	Adeva
birthday	1990/06/20
emp Street	12th 5th Street
emp Barangay	Barangay 183
emp City	VAB, Pasay City
gender	M
picture	uploads/4BOY.png
last Login	2009/12/09
reg Date	2009/11/13
sys Email	110
store	7
role	6

Page   2   of 2

You can choose to edit information individually. You can [add](#), [delete](#), [edit](#), and [copy](#) details from here as well.



2.6.7 Notes




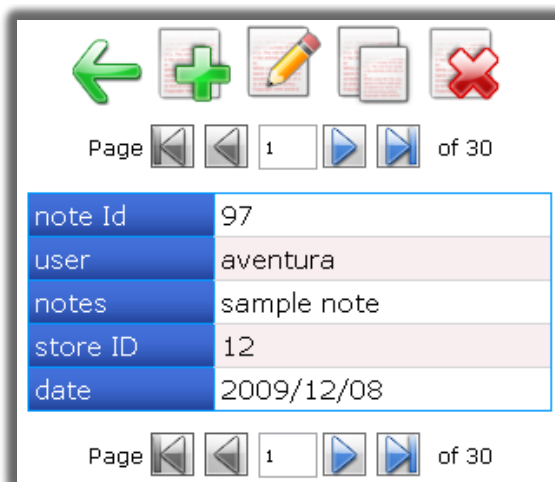
This page shows a list of information regarding all the notes stored in the database such as *note id*, *user*, *store id*, and *date*. Click the  (checkbox) to  (mark) the notes you want to edit. Choose one of the editing tools ([view](#), [add](#), [delete](#), [copy](#), or [edit](#)) then save the changes after. If you want to view the notes itself, simply click  and you will be redirected to the individual entry. Here you will find more details regarding this entry.

Fig. 21 view note



note Id	97
user	aventura
notes	sample note
store ID	12
date	2009/12/08

You can choose to edit information individually. You can [add](#), [delete](#), [edit](#), and [copy](#) details from here as well.

2.6.8 Question

This page shows a list of information regarding all the questions stored in the database such as *note id*, *user*, *store id*, and *date*.

Click the  (checkbox) to  (mark) the question you want to edit. Choose one of the editing tools ([view](#), [add](#), [delete](#), [copy](#), or [edit](#)) then save the changes after. If you want to view the question


itself, simply click  and you will be redirected to the individual entry. Here you will find more details regarding this entry.



Fig. 22 view question

question ID	61
question	T-shirt clean, all buttoned properly, tucked in all sides, logo or color not faded, no loose thread
category ID	13
checklist ID	5
question Desc	

You can choose to edit information individually. You can [add](#), [delete](#), [edit](#), and [copy](#) details from here as well.

2.6.9 Role

This page shows a list of information regarding all the roles stored in the database such as *role id* and *role picture*. Click the ☐

(checkbox) to ☒ (mark) the *role* you want to edit. Choose one of the editing tools ([view](#), [add](#), [delete](#), [copy](#), or [edit](#)) then save the


changes after. If you want to view the *role* itself, simply click  and you will be redirected to the individual entry. Here you will find more details regarding this entry.



Fig. 23 view role

role ID	6
role Desc	Executive
role Picture	6with_glasses.png

You can choose to edit information individually. You can [add](#), [delete](#), [edit](#), and [copy](#) details from here as well.

2.6.10 Session

This page shows a list of information regarding all sessions stored in the database such *session id*, *session name*, and *session no*. Click the ☐ (checkbox) to ☒ (mark) the session you want to edit. Choose one of the editing tools ([view](#), [add](#), [delete](#), [copy](#), or [edit](#)) then save the changes after. If you want to view the session itself,


simply click  and you will be redirected to the individual entry.



Fig. 24 view session

session ID	926
sessionno	fa45e90b82efbdb776bdc348fb94c8d7
username	bmendoza

You can choose to edit information individually. You can [add](#), [delete](#), [edit](#), and [copy](#) details from here as well.



2.6.11 Store

This page shows a list of information regarding all the store branches stored in the database such as *role id* and *role picture*. Click the  (checkbox) to  (mark) the store you want to edit. Choose one of the editing tools ([view](#), [add](#), [delete](#), [copy](#), or [edit](#)) then save the


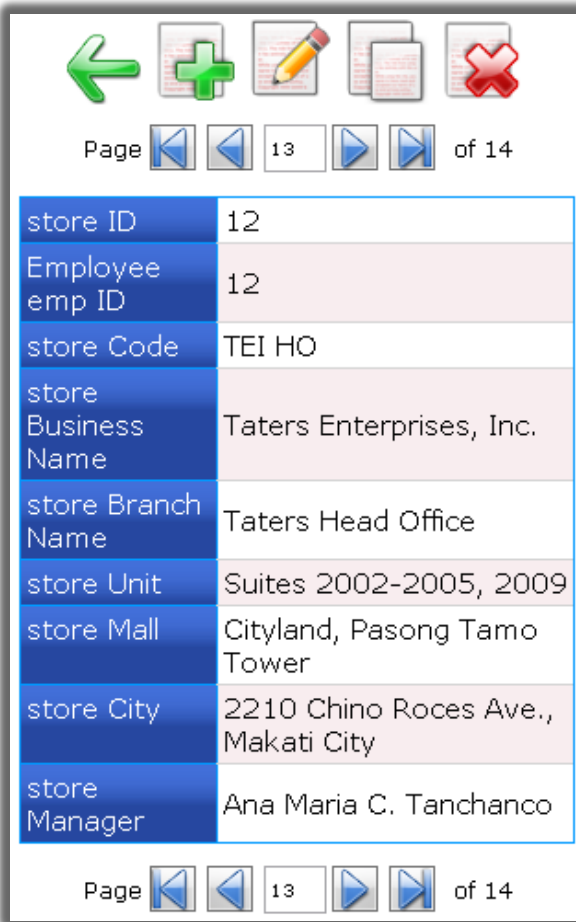
changes after. If you want to view the store itself, simply click  and you will be redirected to the individual entry. Here you will find more details regarding this entry.

Fig. 25 view store



store ID	12
Employee emp ID	12
store Code	TEI HO
store Business Name	Taters Enterprises, Inc.
store Branch Name	Taters Head Office
store Unit	Suites 2002-2005, 2009
store Mall	Cityland, Pasong Tamo Tower
store City	2210 Chino Roces Ave., Makati City
store Manager	Ana Maria C. Tanchanco

You can choose to edit information individually. You can [add](#), [delete](#), [edit](#), and [copy](#) details from here as well.



2.6.12 Suggestion













This page shows a list of information regarding all the suggestions stored in the database such as *suggestion id*, *keyword*, *emp id*, *store id*, *approved*, *date*, *area id*, and *approved date*. Click the  (checkbox) to  (mark) the *suggestion* you want to edit. Choose one of the editing tools ([view](#), [add](#), [delete](#), [copy](#), or [edit](#)) then save the changes after. If you want to view the *suggestion* itself, simply click  and you will be redirected to the individual entry. Here you will find more details regarding this entry.

Fig. 26 view *suggestion*


Page   33   of 33

suggestion ID	88
suggestion Text	sample suggestion sample suggestion sample suggestion sample suggestion
keyword	Personnel sample
emp ID	115
store ID	7
approved	cdinco
date	2009/12/08
area ID	10
approved Date	2009/12/08

Page   33   of 33

You can choose to edit information individually. You can [add](#), [delete](#), [edit](#), and [copy](#) details from here as well.



2.6.13 Survey

This page shows a list of information regarding all the survey stored in the database such as *survey id*, *checklist id*, *emp id*, *survey prepared*, *store id*, *survey verified*, *verified date*, and *prepared date*. Click the ☐ (checkbox) to ☒ (mark) the survey you want to edit. Choose one of the editing tools ([view](#), [add](#), [delete](#), [copy](#), or [edit](#)) then save the changes after. If you want to view the survey

















itself, simply click  and you will be redirected to the individual entry. Here you will find more details regarding this entry.

Fig. 27 view survey



Page   51   of 51

survey ID	129
checklist ID	5
Employee emp ID	0
survey Desc	
survey Prepared	bmendoza
store ID	12
survey Checked	
survey Verified	cdinco
verified Date	2009/11/27
emp Prepared	
prepared Date	2009/11/27
emp Checked	

Page   51   of 51

You can choose to edit information individually. You can [add](#), [delete](#), [edit](#), and [copy](#) details from here as well.



2.6.14 TE Plan

This page shows a list of information regarding all the *te plans* stored in the database such as *te plan id*, *date prepared*, *emp prepared*, *store*, *from period* and *to period*. Click the ☐ (checkbox) to ☒ (mark) the *te plan* you want to edit. Choose one of the editing tools ([view](#), [add](#), [delete](#), [copy](#), or [edit](#)) then save the changes after.




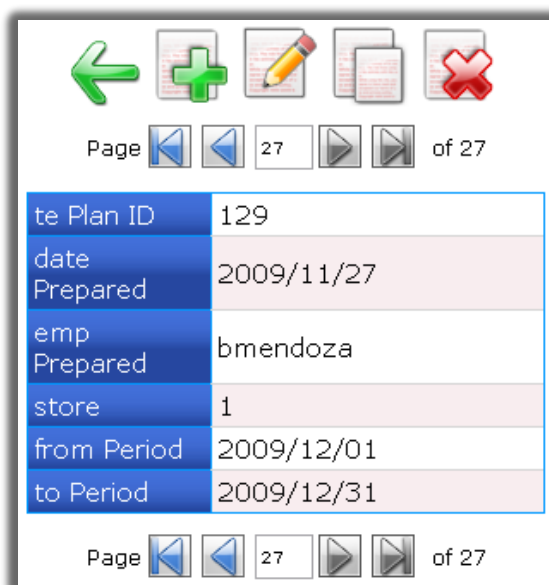
If you want to view the *te plan* itself, simply click  and you will be redirected to the individual entry. Here you will find more details regarding this entry.

Fig. 28 view *te plan*



te Plan ID	129
date Prepared	2009/11/27
emp Prepared	bmendoza
store	1
from Period	2009/12/01
to Period	2009/12/31

You can choose to edit information individually. You can [add](#), [delete](#), [edit](#), and [copy](#) details from here as well.



2.6.15 TE Plan Item



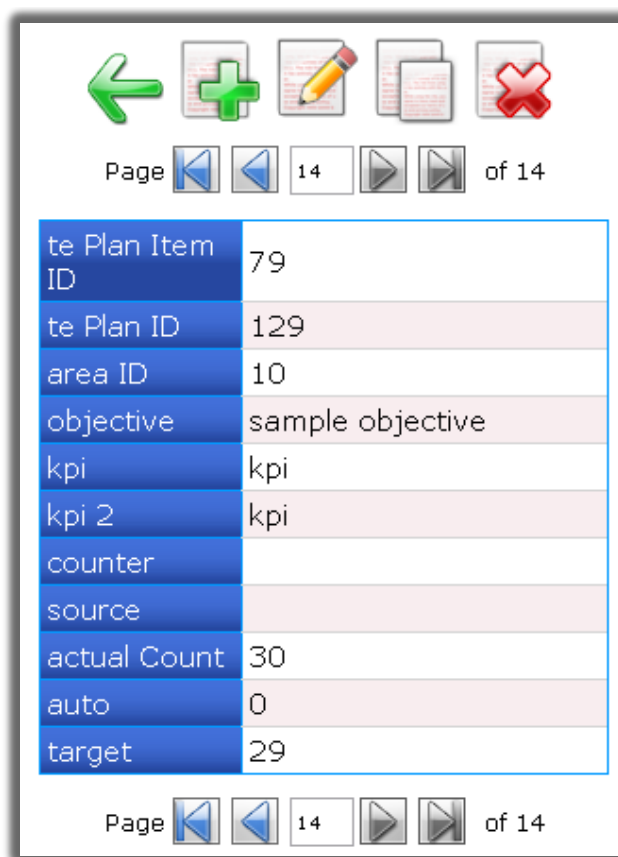
This page shows a list of information regarding all the te plan items stored in the database such as *te plan item id*, *te plan id*, *area id*, *source*, *actual count*, *auto*, and *target*. Click the ☐ (checkbox) to  (mark) the *te plan item* you want to edit. Choose one of the editing tools ([view](#), [add](#), [delete](#), [copy](#), or [edit](#)) then save the changes after. If you want to view the *te plan item* itself, simply click  and you will be redirected to the individual entry. Here you will find more details regarding this entry.

Fig. 29 view *te plan item*



te Plan Item ID	79
te Plan ID	129
area ID	10
objective	sample objective
kpi	kpi
kpi 2	kpi
counter	
source	
actual Count	30
auto	0
target	29

You can choose to edit information individually. You can [add](#), [delete](#), [edit](#), and [copy](#) details from here as well.



2.7 Logout

This functionality will sign you out of the Performance Monitoring System Core.

3. Direct Links



3.2 Direct Link to Instant Messenger

This will redirect you to the TEI Instant Messenger. Use the same account credentials for the PMS and PMS Core.



3.2 Instant Messenger ADMIN

This will redirect you to the TEI Instant Messenger Admin.



3. Help

This is a link to user manual of the PMS Core. Simply click this icon and you will be redirected to the user manual. The user manual is a complete instructional guide that is available for easy access.

4. HTML Reserved Characters

When entering data in the PMS Core, for example creating entries of checklists. Some characters are reserved in HTML and XHTML. For example, you cannot use the greater than or less than signs within your text because the browser could mistake them for markup.



HTML and XHTML processors must support the five special characters listed in the table below:

Character	Entity Number	Entity Name	Description
"	"	"	quotation mark
'	'	' (does not work in IE)	apostrophe
&	&	&	ampersand
<	<	<	less-than
>	>	>	greater-than

Make sure not to use these characters during input.