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Overview

Welcome to the Retail Engagement Program (REP).

This system is designed to provide the tools and resources needed to effectively manage the REP system. REP system has two parts: the Windows application and an Administrative Portal. This document focuses on the administrative website where country data is managed. Information on installation and usage of the Windows application can be found in Appendix B.

Initial data in the REP system is pre-populated from the Roll Up file completed prior to training. The information in the Roll Up file includes:

- Retail chains and stores
- Field Representatives (Reps) and management team

The web portal manages the above information as well as control:

- Resources used to train Retail Sales Professionals (RSPs)
- Resources for the Reps
    - Plan-o-Grams
    - Kiosk Maintenance
    - Demo Installation
    - Field Rep training resources
- Breaking News – Notification system for new products, calls to action, and other locally relevant news that the Reps need.

The following reports are available:

- Scorecard – KPI statistics view
- Store Visit Compliance
- Training Activities
- Photos

Call report data can also be exported to Excel for further analysis.

Getting Started

Before using the REP portal, the following steps should be completed:

REP – Engagement Survey

This survey requests the following information:

- Country Contact information
- Current reporting capabilities
- Field labor breakdown by rep type as defined in the Field Labor Playbook

Roll Up File for Retail Engagement Program

After completing the survey, a Roll Up file is need to pre-populate the REP system for your country. The roll up file defines:

- Administrator username and temporary password
- Retail Chains
  - Chain names should match Retail-BI for KPI reporting.
  - Chain Classification – used to assign different execution/support levels per stores in the chains. Refer to the Field Labor Playbook for definitions of Good/Better/Best execution.
- Retail Stores
  - Address
  - GPS coordinates
  - Monthly Visit Frequency
- Territory structure
- Field Reps and their managers

Instructions for completing a Roll Up file are included in the spreadsheet.

Once both of these files are complete and entered into the REP system it takes approximately 2 business days after the last completed submission of the Roll Up file before the files can be accessed and maintenance can begin.

Please refer to Appendix A for a checklist of tasks to complete during initial setup.

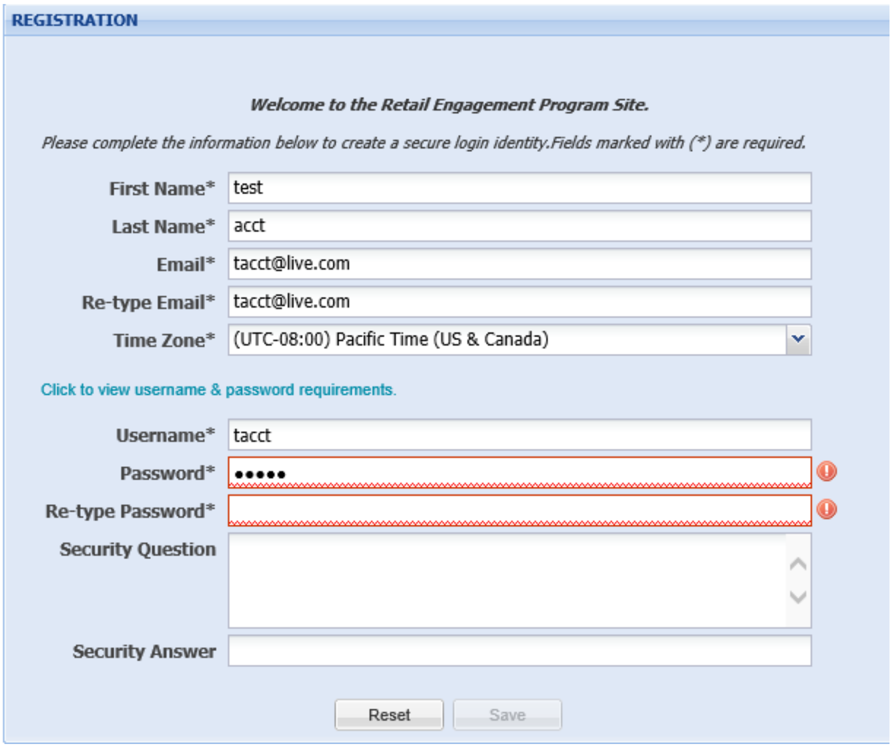
Website Login

Use the initial username and password designated in the Roll Up file. Send an email to MSFTREP@Microsoft.com, if this information is needed.

Click on the following link, or type the address into your browser: www.msftreps.com

The login page appears:

During the first login to the system, a prompt to change the temporary password and security question appears:

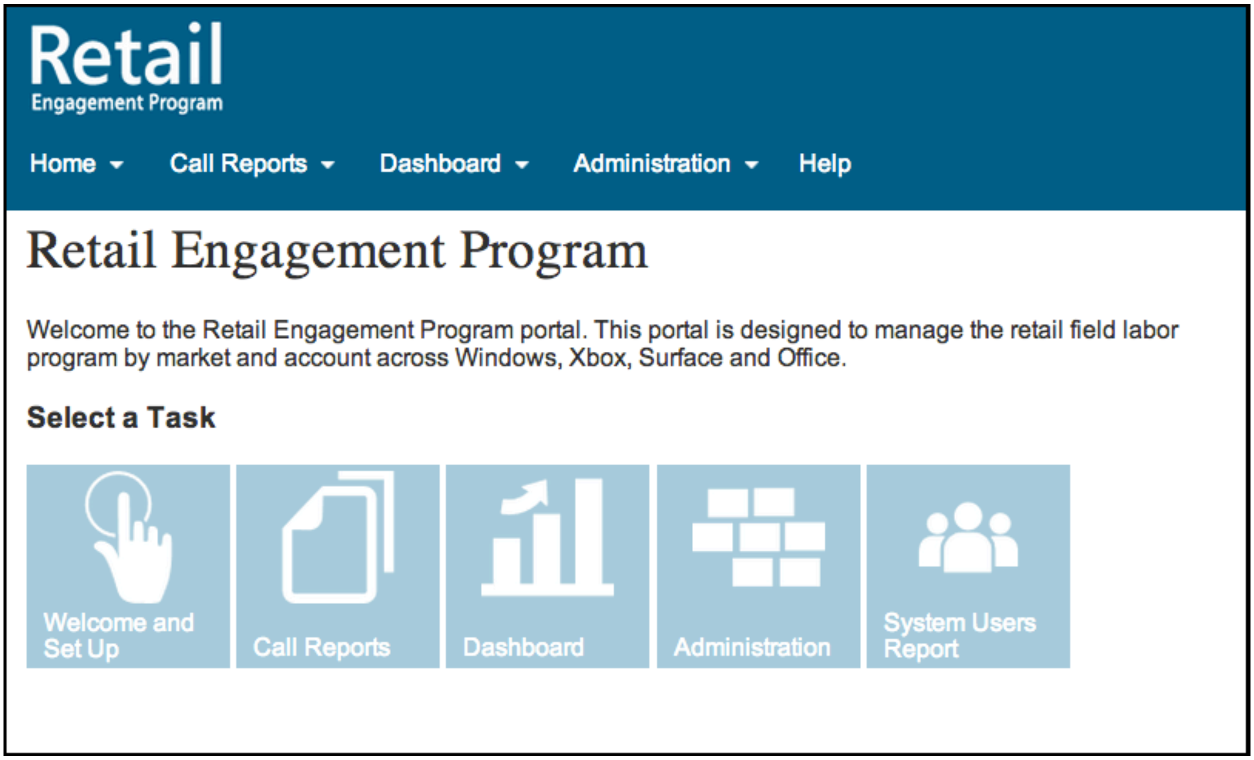


Password Requirements:

- Must be from 8 to 14 characters long.
- Contain at least 1 uppercase character and at least 1 lowercase character.
- Contain at least 1 of the following special characters: -_"!@#$%^&*+=(){}[]<>|\`~,.;:/?

Enter a new Password, Security Question and Security Answer. Click on Save at which point the REP Home screen will appear.

Home Screen



Welcome and Setup

The country welcome message can be changed to include locally relevant items like procedures, holidays, etc. Instructions on installing and setting up the REP application can also be found here.

Note: During the initial deployment of the program, the Windows 8.x application is in Beta status. You will need to load the application following the instructions in Appendix A.

Call Reports

Call reports are forms created to guide the Rep in their activities while visiting their retail stores. A global Store Visit template has been created that includes questions that will map directly back to the Retail-BI KPIs. For a full list of KPIs that are tracked globally, see Appendix C.

The Global Store Visit template is divided into sections by category: Windows, Surface, Office, Xbox and PC Accessories. When creating a call report, select the categories that map directly to the products that are supported by each type of Rep available in country.

There are additional questions/tasks included in the global template that can be modified or deleted as needed. Locally relevant questions and tasks can also be added. See the Call Reports section below for more details.

Dashboard

To see the progress of your field teams and all information gathered in the field, use the standardized reports located in the dashboard. Report details can be found in the Dashboard section below.

Administration

The administrative section is dedicated to maintaining the following items:

- General Settings – Settings for the Welcome page on the website.
- Database Management – Maintenance tasks associated with stores, chains, and users of the REP system.
    - Store Management – Add/Remove/Modify store lists, chains and chain classifications.
    - User Management – Add/Remove/Modify Administrators, Reps and Rep managers.
    - Assignments
        - Store Assignments – Assign Reps to stores
        - Calendar – Assign store visits to Reps
- Resource File Management – Upload localized copies of files used by the Reps in the stores. This can include:
    - Plan-o-grams
    - Kiosk maintenance and setup instructions
    - Demo installation instructions
    - Training resources for the Reps
- RSP Training Management – Maintenance of the Monthly Training Guidance that was previously available as a PowerPoint Presentation.
    - Global monthly templates are pre-populated based on the monthly training guidance and grouped by category.
    - Modifications can be made based on the availability of product in market.
    - Resources from www.MicrosoftRAD.com (US-EN) are pre-populated. If localized versions of the resources are required, they can be downloaded from RAD, localized and uploaded to REP.
- Breaking News – Maintenance of the Breaking News section of the application home screen. Global breaking news will be available to accept, reject or localize based on product availability or relevance in region.
- Change Log – Track changes to the information in the REP system.

Call Reports

Creating and editing call reports offers the Administrator an extreme amount of flexibility in managing field labor activities across the retail chains in country.

The system offers a variety of response types (large text box, photo capture, drop down list, multiple select list, etc.) to best format data collection needs. Appendix D contains a complete list of field types and their definitions.

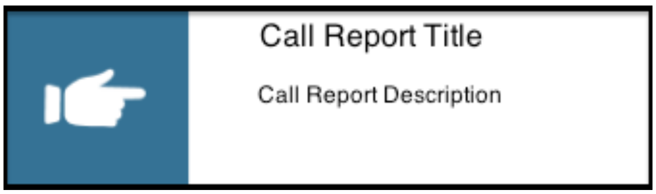
Call Reports support basic conditional form logic. For example, creating a drop down menu with 5 items and having a new question appear if one of those items is selected.

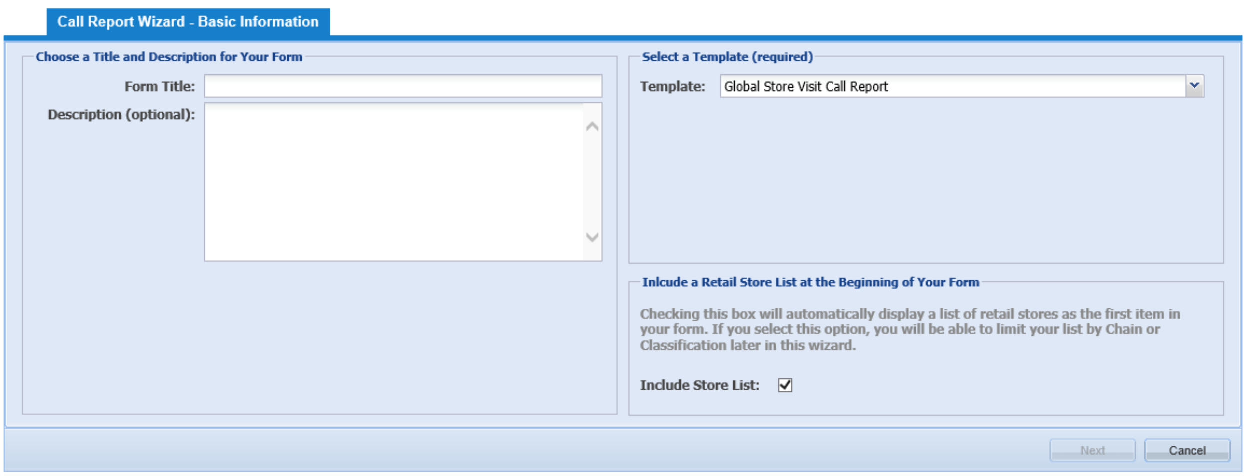
The entire interface has over 100 functions and features and will take 15-30 minutes to learn how to use this.

All forms have support for language localization. The client application detects the language setting of the device and if a translation is available (in part or in whole), the translation will display.

Create Call Reports

After clicking Create, enter a **Form Title** and **Description**. These will display on the Windows application home screen like the tile to the right.





Select a **Template** from the drop-down list. If no call reports have been created, the only one available will be the Global Store Visit Call Report. This template is divided into sections by category: Windows, Surface, Office, Xbox and PC Accessories. During call report creation, select the categories that map directly to the products that are supported by each type of Rep in country. If there are previously created call reports, pick one to copy. All modifications made to the original call report will be copied into the new one, including conditional logic and localization.

***Note**: It is reccommended to create a master call report specific for the country. This can be based on a Global template or a brand new call report. The master call report for the country should ideally include any question that may need to be asked to any retailer.Country administrators can add country specific information and do some localizing if needed. This master call report can then be used as a template for creating all other custom call reports for the country, without the need to localize each report.*

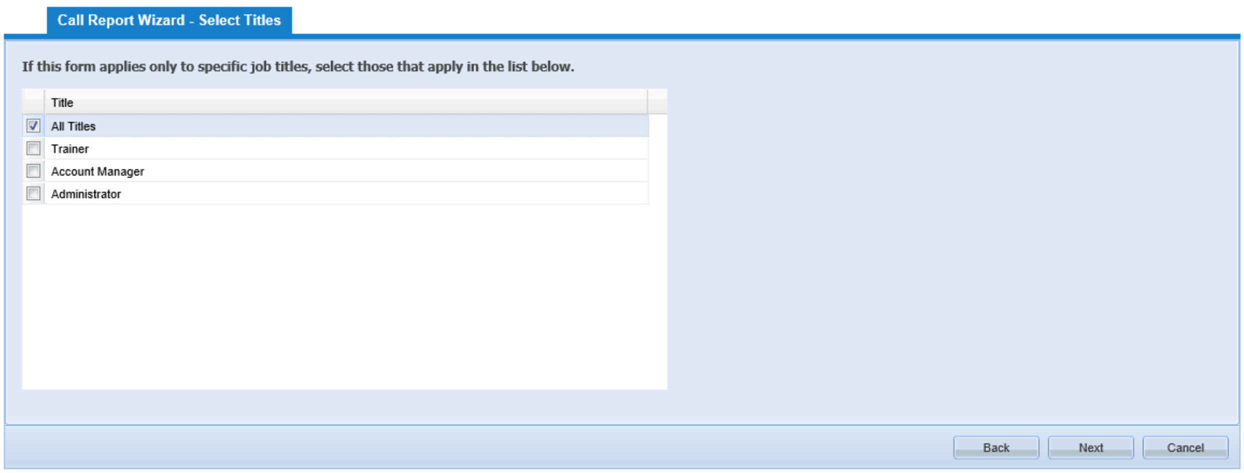
Check the **Include Store List** option and click on **Next**.

Call Report Assignments

Call reports can be assigned to any combination of Field Rep type, Retail Chain, or Chain Classification.

Assign Reps

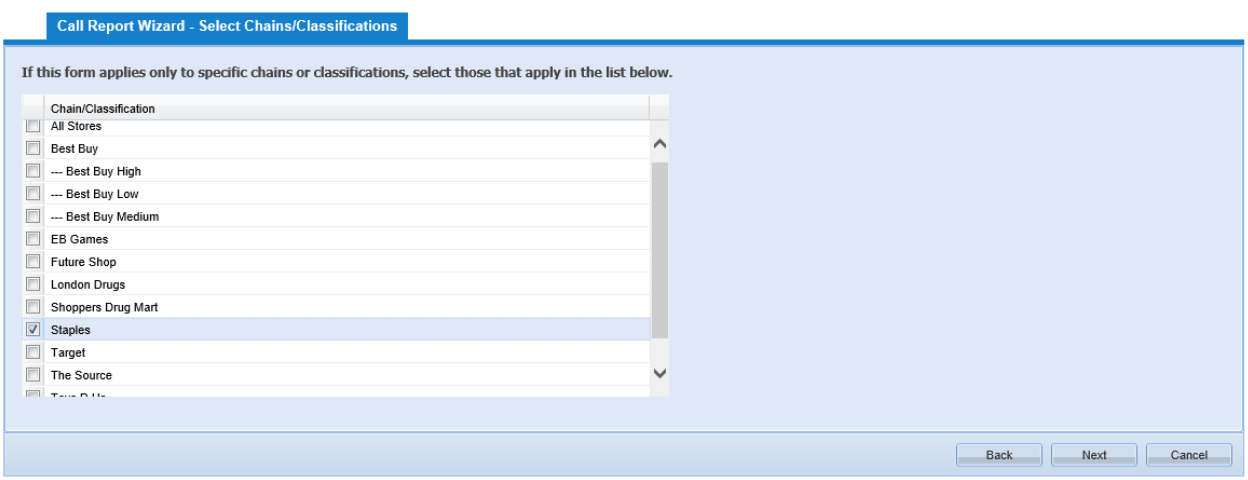
By assigning Reps different titles based on job function or responsibilities, the call report can be customized to fit the specific needs. For example: if field reps only support Xbox assign them a title of Gaming Rep and create a call report that only has the relevant questions for the gaming department. For more information on Rep Titles, see the User Management section of this guide.



Select the Rep Titles that need to have access to this call report and click the **Next** button.

Assign Chains and Classifications

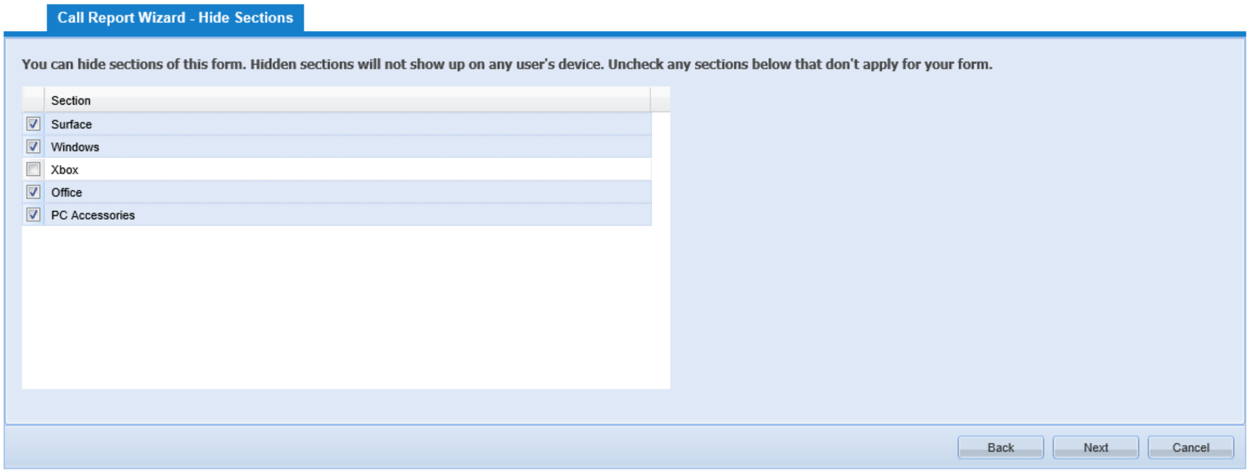
Classifications are used to define different support levels for stores in a chain. Following the Field Labor Guidance, the classifications would be Good, Better, and Best. Additional classifications based on the support provided to local retailers can be defined. See the Store Management section of this guide for information and setup of store classifications.



Select the Retail Chains for this form, and click the **Next** button to continue.

Select Sections

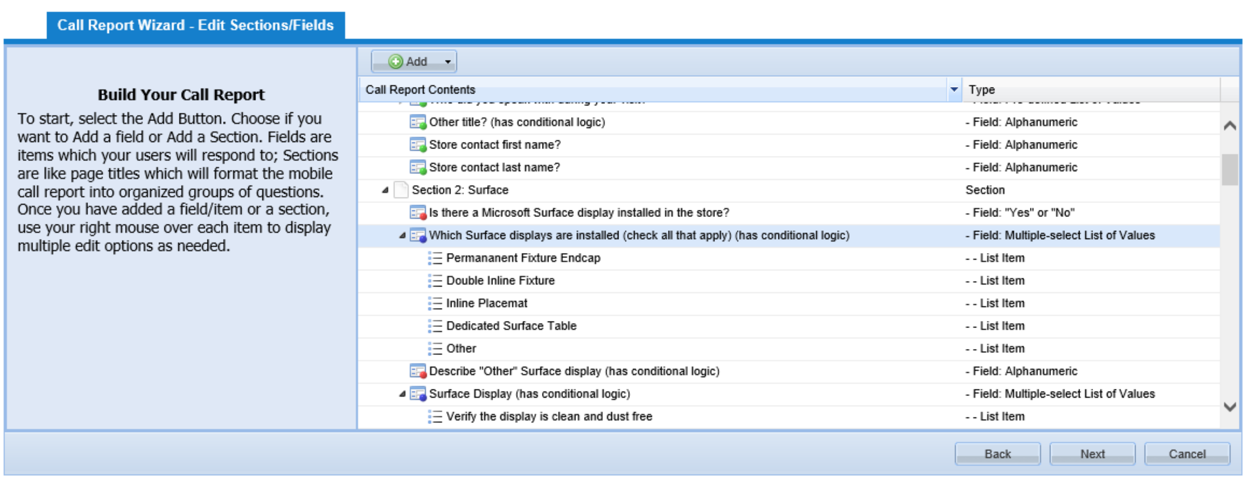
The Global Call Report template has sections for each product category that includes a standard set of tasks. Some of those tasks can be edited or removed, but others will map to global KPIs and cannot be removed.



Un-select any section that should not appear in the call report. Sections without a checkmark will be hidden in the form; however, these sections can be reactivated later if needed. See the Hiding/Un-Hiding Sections in this guide for more information.

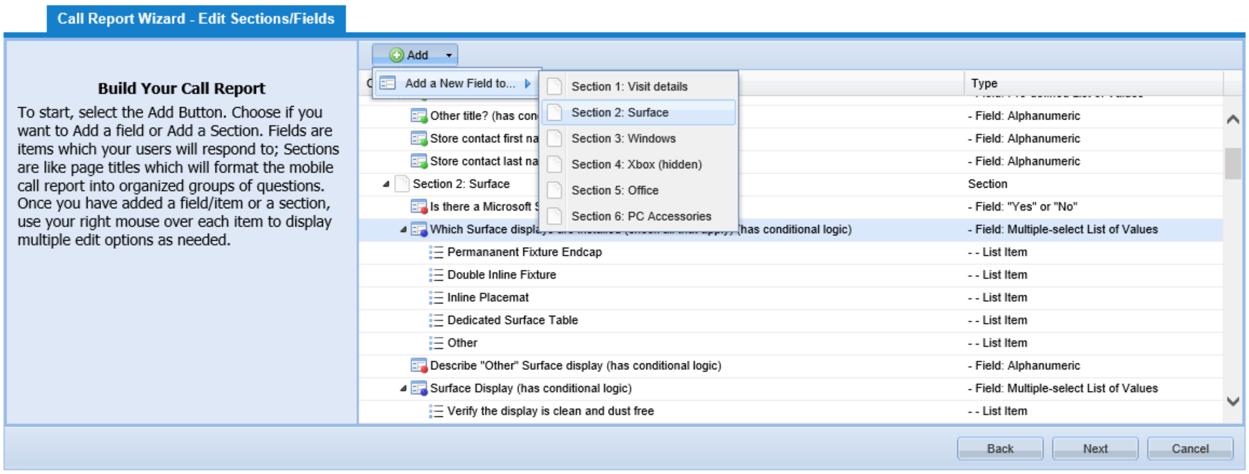
Task maintenance

A call report with the default global questions pre-populated has now been created. Changes and locally relevant guidance can now be added into the call report.

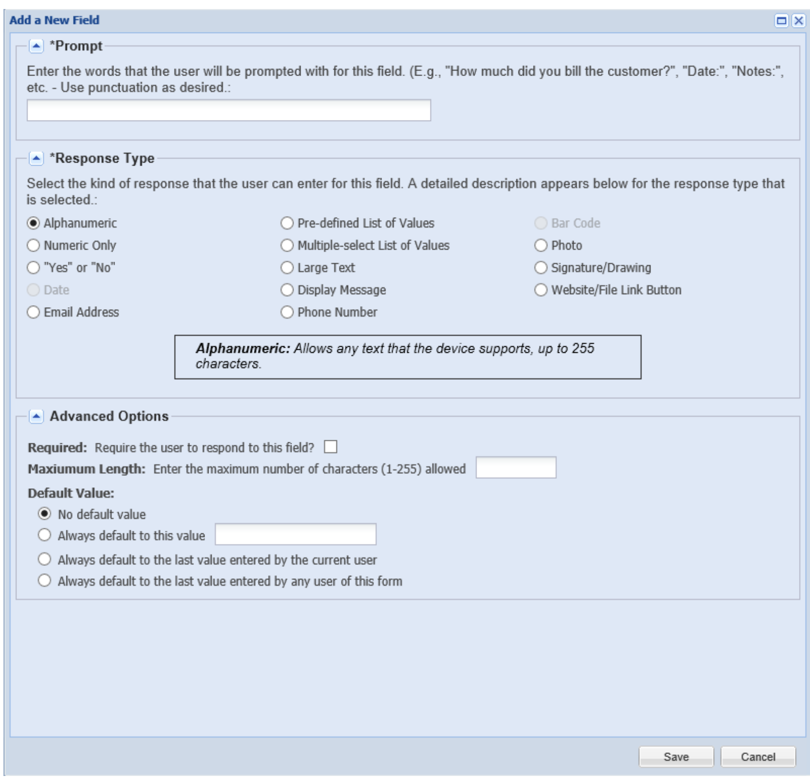


Adding New Tasks/Questions

To add a new task or question (field) click on the **Add** button on the top of the Call Report Wizard and select the section where a new field should be added. New fields show up at the bottom of the section, but can be moved by dragging and dropping them into the correct location.



Once a section is selected, the Add a New Field dialog box opens.



Enter a **Prompt**. A prompt is the action the user should take to complete a task. For example:

- Take a photo of the front of the store
- Select all that apply to the promotion
- Were there more than 100 people in the store when you were there?

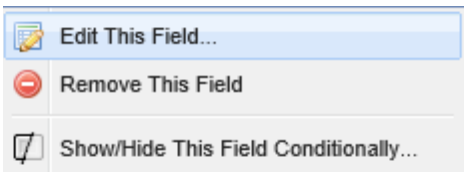
Select the **Response Type**. The call report builder offers multiple formats such as, Yes or No, drop down menu, multiple select, photo capture, create a button to go to a link on the web or open a file that has been uploaded (and automatically downloaded to the device) to run (graphic, video, Word, Excel, PDF, PPT, etc.). Appendix D contains a complete list of field types and their definitions.

Select the **Advanced Options** for this field. The options will vary based on the response type.

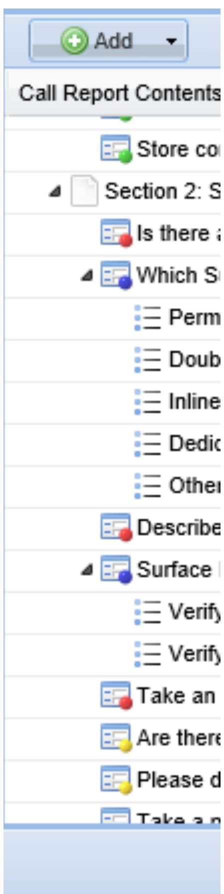
Click on the **Save** button when finished.

Editing or Removing Questions

Edit or remove questions in the call report by right clicking on a field and choosing the appropriate option in the pop-up menu.



Fields from the global template have the following restrictions:



 Field can be removed or changed. Fields added will always be marked green.

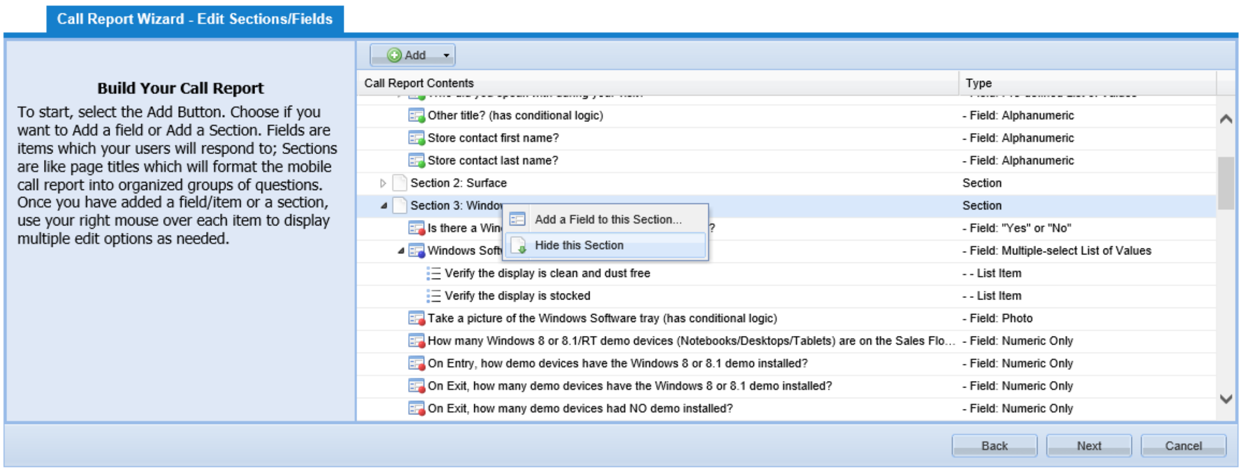
 Field cannot be removed or changed. These questions are required.

 Field cannot be removed, contents can be changed. Usually used in drop down select fields. The content of the drop down options can be changed, but not the field name.

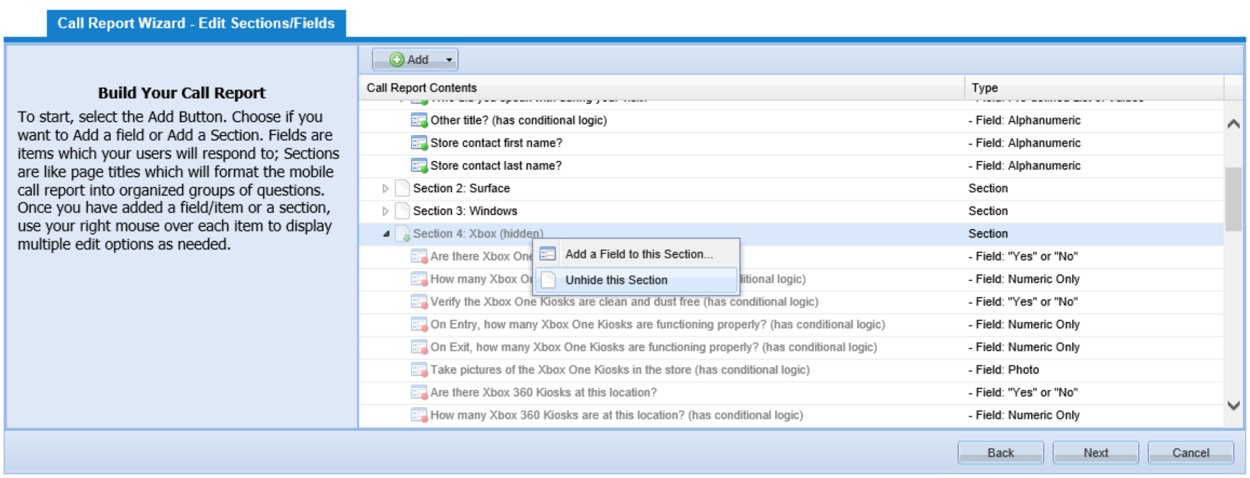
 Field can be removed but not changed. These are optional fields that can be remove, but not edited.

Hiding/Un-hiding Sections

Sections can be hidden or made visible depending on the products supported in the retailer. For example: A retail chain does not currently assort Surface so those questions can be hidden.



Right click on the section name and select **Hide this Section**. This section will not appear on the field rep's device.

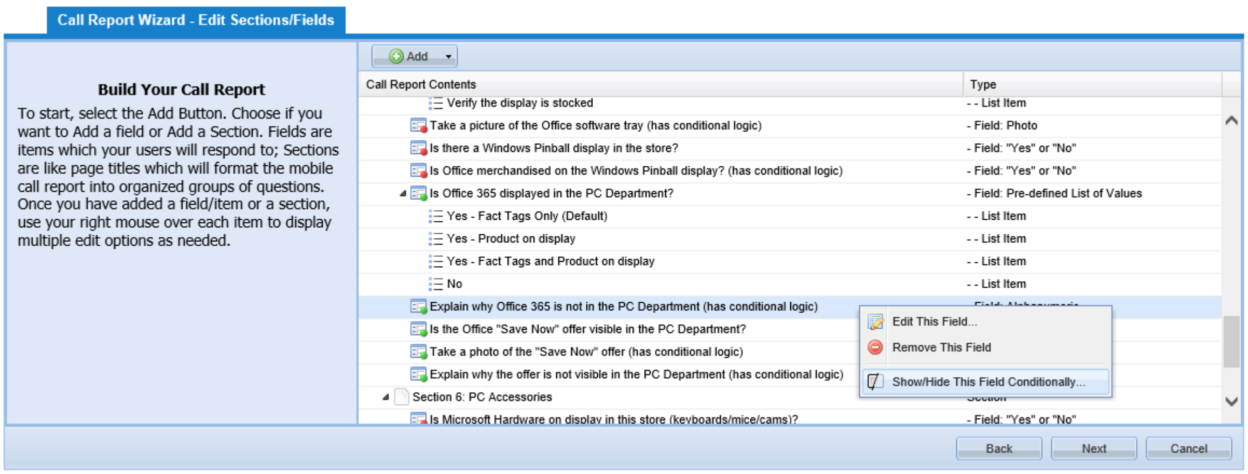


If the retailer eventually assorts Surface devices, the section can be made visible again by right clicking on the section and selecting **Unhide this Section**.

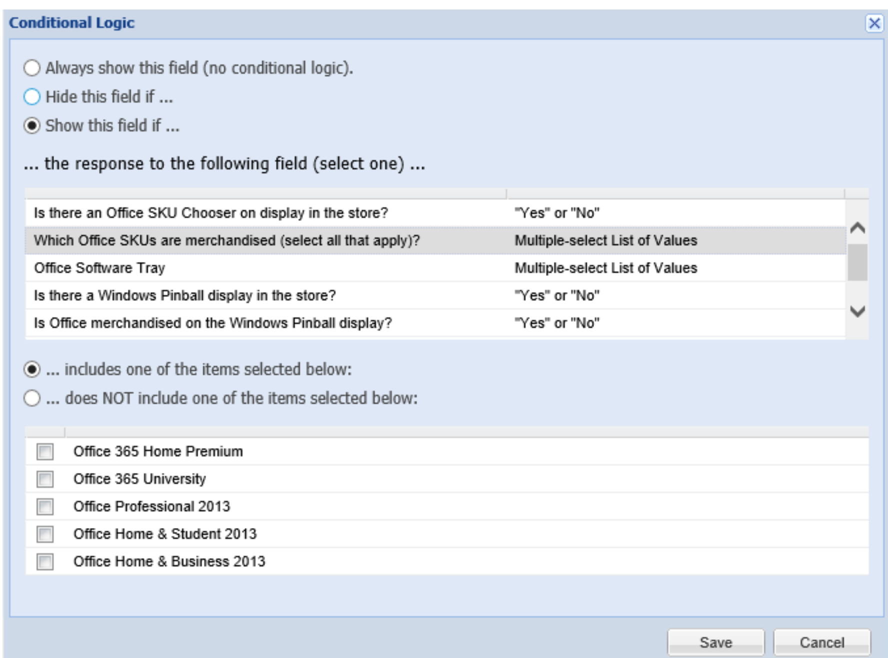
Conditional logic

Conditional logic allows questions to be hidden or appear based on answers to prior questions in the same section. For example: a question asking if a display is set up properly (to plan-o-gram) is answered as “No”, another can be displayed to ask why the display is not set up properly.

Conditional logic can be triggered by Yes/No, Single Select and Multiple-Select questions. See Appendix D for definition of available field types.



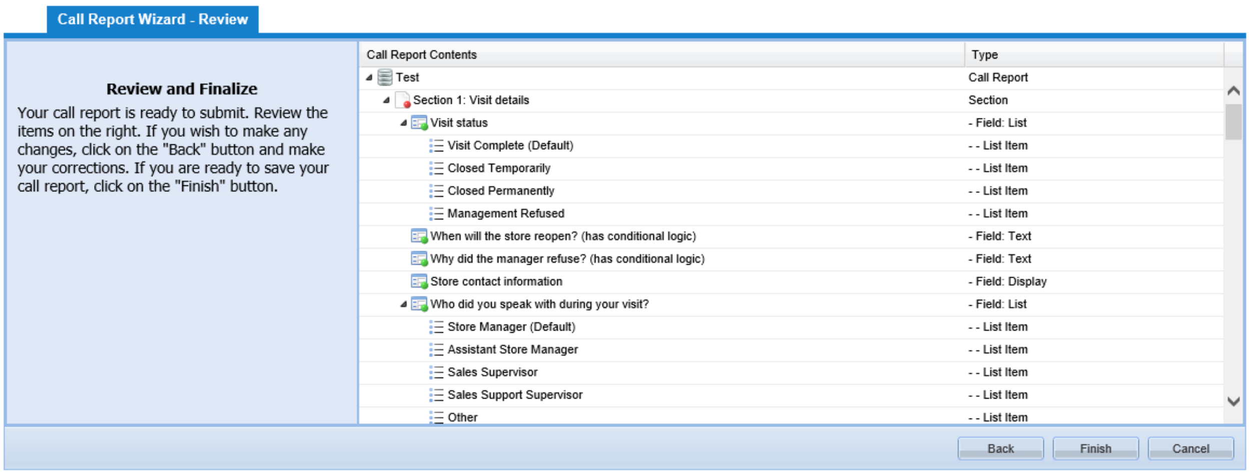
To use conditional logic, right click on the field and select **Show/Hide This Field Conditionally**



Select the option to **Always show** the field, **Hide** or **Show**, then select the field that this is based on from the list presented.

Select options based on the type of field selected, and click the **Save** button when complete.

After all changes have been made, click on the **Next** button.



Review the call report then click on the **Finish** button to save the report.

A prompt to localize the call report will be displayed.

Click the No button if localization is not needed.

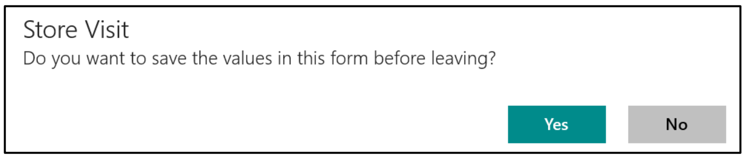
To localize the call report, click the **Yes** button.

Note: *If this call report was created from a copy of one that was previously localized, there is only a need to localize any new questions added. If questions were only removed from this call report, there is no need to localize.*

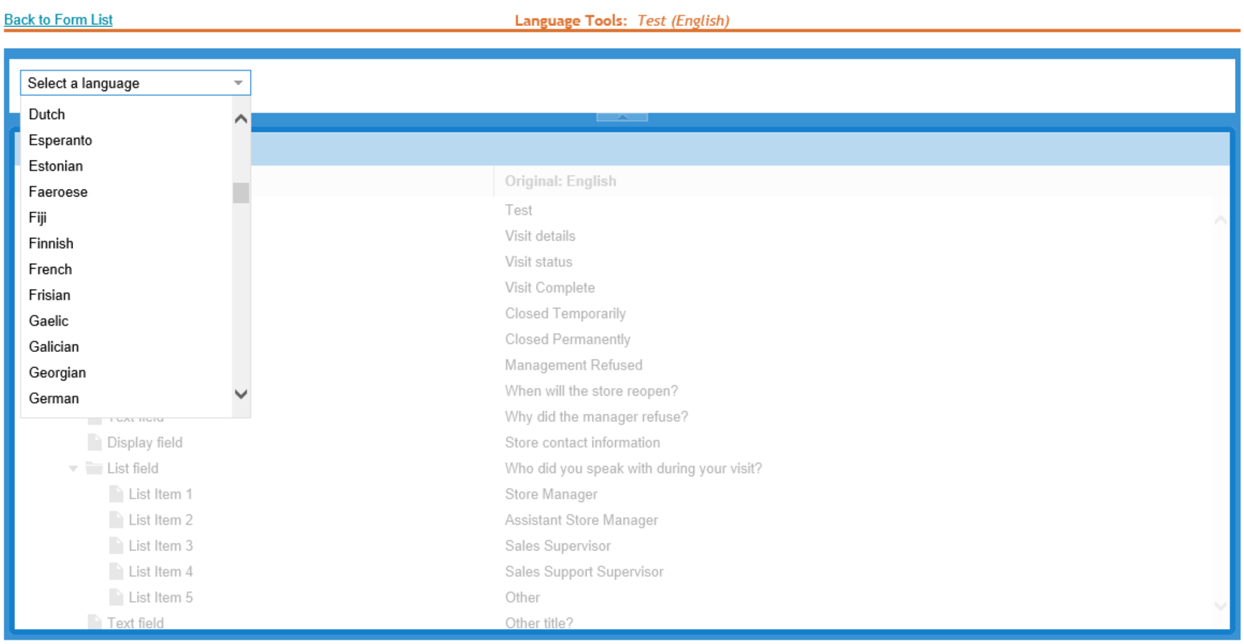
Localization

Call Reports can be localized into any language supported by Windows 8.x. Instructions on how to load a language pack onto a Windows PC can be found here: http://support.microsoft.com/kb/2607607/en-us

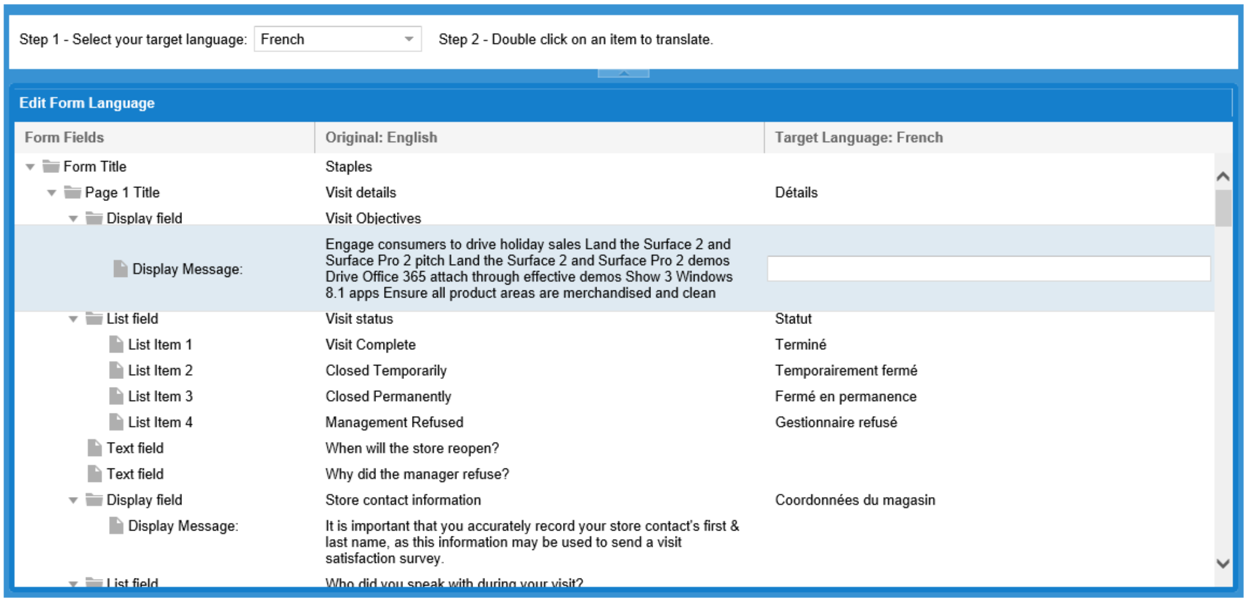
Localization is currently limited to the fields in a call report. System-wide labels are currently in English and we are looking to incorporate localization of the full application in the next version (H2FY14). Examples of items that will currently display in English are the bottons used for navigation and dialog boxes:



To localize a call report, select the language from the drop-down list.



The list of languages is color coded based on translation of the form. If the language is orange, it is partially translated. If the language is green it has been completely translated, otherwise the color is black.



For each field in the call report, double click on it to translate. Type in the translation on the right side and hit enter or click another question to save the changes.

If multiple translations are needed, just select the language from the drop down list and enter those translations as well.

Note: *Localization may only need to be done once for the first call report that is created from the global template. Create a new call report as a copy of this one, it will retain the localization already completed. Only new questions added need to be localized.*

There is no save option here. All updates are available after exiting the translate field.

Manage Call Reports

This module provides functions to report on activity for call reports; assign alerts (escalations and scheduled reports); and the ability to modify and localize call reports that have already been created.

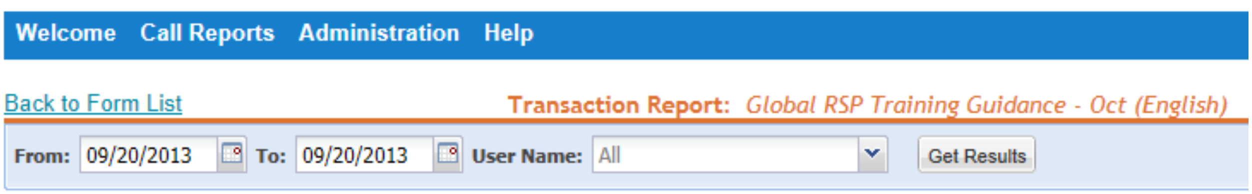
Transaction Report

Call Reports	Options						
Best Buy Call Report	Transaction Report	GPS	Escalation	Schedule Reports	Configure	Language Tools	Delete
EB Games Call Report	Transaction Report	GPS	Escalation	Schedule Reports	Configure	Language Tools	Delete
Event Call Report	Transaction Report	GPS	Escalation	Schedule Reports	Configure	Language Tools	Delete
Future Shop Call Report	Transaction Report	GPS	Escalation	Schedule Reports	Configure	Language Tools	Delete
Staples Call Report	Transaction Report	GPS	Escalation	Schedule Reports	Configure	Language Tools	Delete

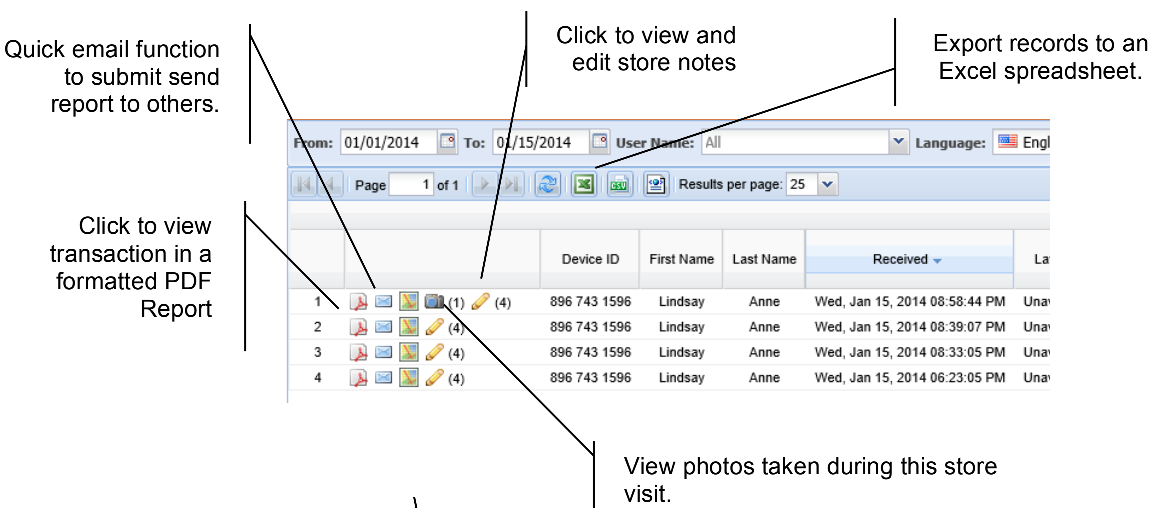
Transaction Reports display all submissions for a call report for a specified date range.

A Rep can view all of their transaction reports, a manager can view all transaction reports from Reps that report to them and an admin for the country can view and modify all transaction reports.

Transaction reports can viewed with all photos as a PDF and can also be exported to Excel. Excel export will also include all photos taken at that store visit.



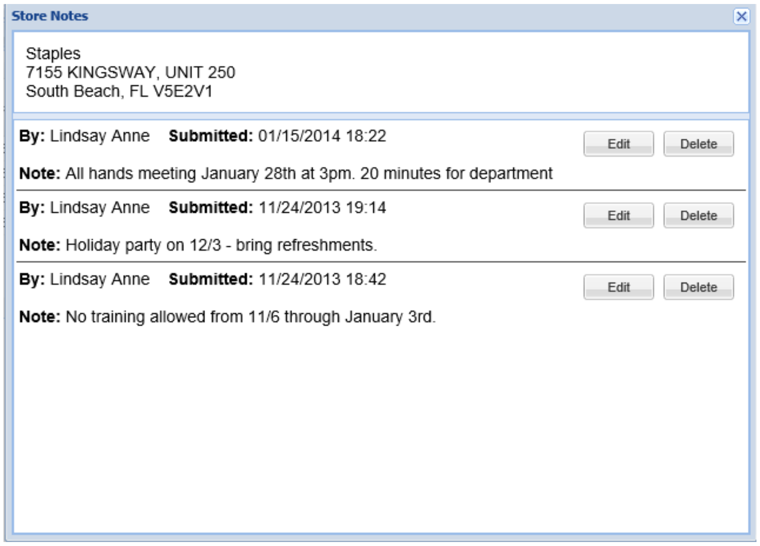
Select a Date Range (defaults to the last report submission date). Managers can also select a single rep or all reps assigned to them. Select the **Get Results** button.



When Location Coordinates are

Store Notes

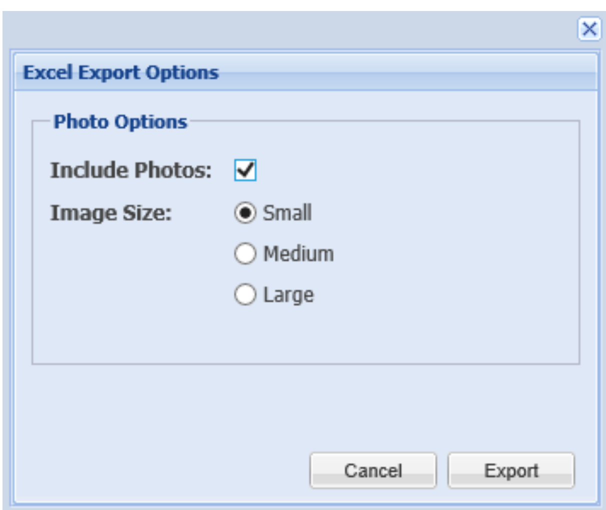
Store notes are input from the reps while in the stores. These can consist of reminders or helpful hints about the store. Clicking on the pencil icon in a transaction report (4) will open the Store Note editor for editing or deleting of content. These modifications will appear in the application the next time it is synchronized.



Export Transaction Reports

Basic reporting is contained in the Dashboards. The Download to Excel option allows further analysis of call reports.

Click on the Download to Excel button . Select whether to include photos and the size of the photos, then click **Export**.

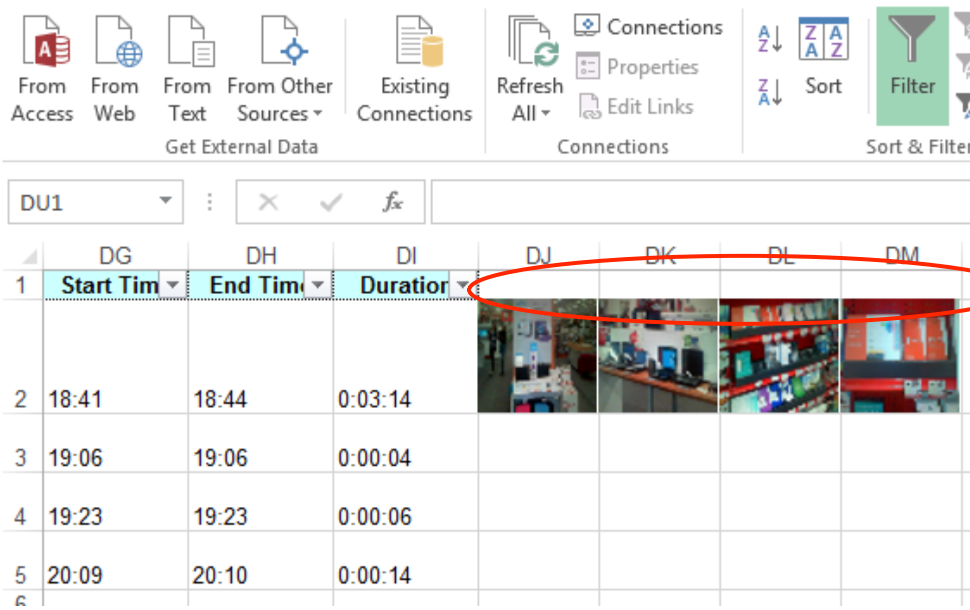


Note: Exporting photos does not download the full resolution photo, only thumbnails of the original photo.

Once the file is opened in Excel, all of the questions included in the call report will be listed as the column headers. Each store visit will be a row in the spreadsheet.

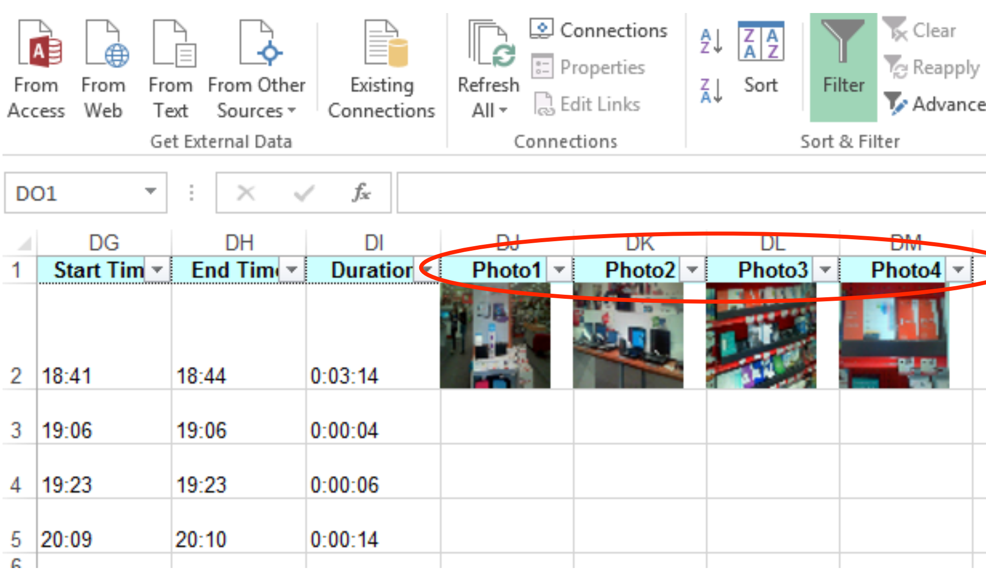
Note: *Currently, if photos are included and the data is sorted, the photos will not remain with the correct record. To resolve this, enter titles in the columns that contain pictures before selecting the Filter and Sort options in Excel. A solution to this problem is being investigated.*

Before (notice that there are no filer options for the photo columns):



Turn off filtering, add column headers and then turn filtering back on.

After (photos will now sort and stay with the original record):



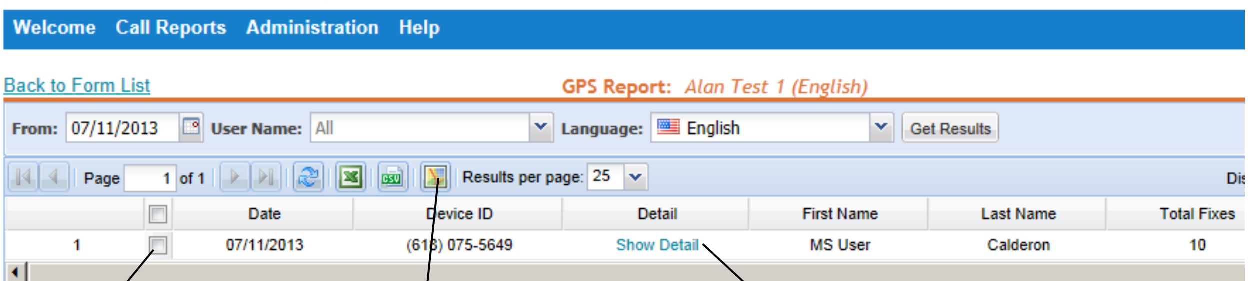
GPS

Call Reports	Options						
Best Buy Call Report	Transaction Report	GPS	Escalation	Schedule Reports	Configure	Language Tools	Delete
EB Games Call Report	Transaction Report	GPS	Escalation	Schedule Reports	Configure	Language Tools	Delete
Event Call Report	Transaction Report	GPS	Escalation	Schedule Reports	Configure	Language Tools	Delete
Future Shop Call Report	Transaction Report	GPS	Escalation	Schedule Reports	Configure	Language Tools	Delete
Staples Call Report	Transaction Report	GPS	Escalation	Schedule Reports	Configure	Language Tools	Delete

When this solution is used on a Windows Phone 8.x or Windows 8.x device with built in GPS chipsets, submission to the server of call reports are often real-time and provide a higher accuracy of tracking users.

When tracking users using a non GPS device, location based services are provided by the closest Wi-Fi service in which the device is connected. GPS Tracking using non-GPS enabled devices is not expected to be a highly accurate or timely way of tracking users with the Retail Engagement Program.

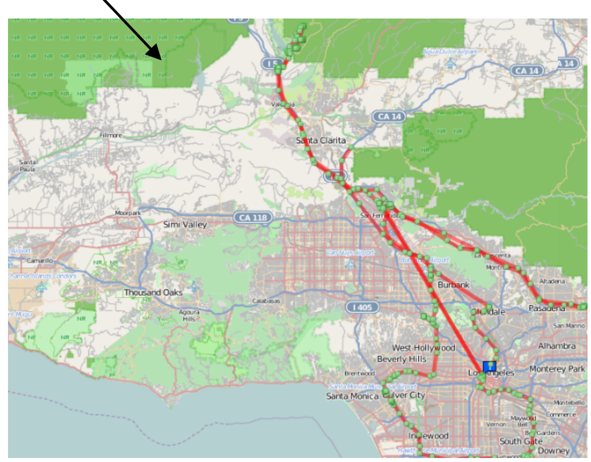
Select a Date Range (Managers can also select a single rep or all reps) and select the Get Results Button.



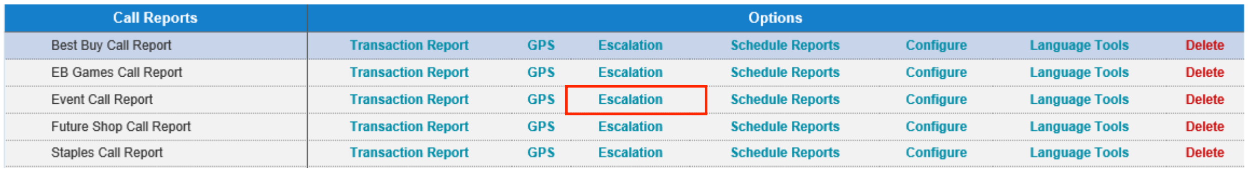
1. Check this box to map coordinates of this Rep.

2. Select the map icon to display all coordinates available for that day on a map.

Selecting this link will display the raw detail (LAT, LONG, Date and Time of each GPS coordinate captured).

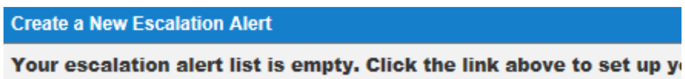


Escalation

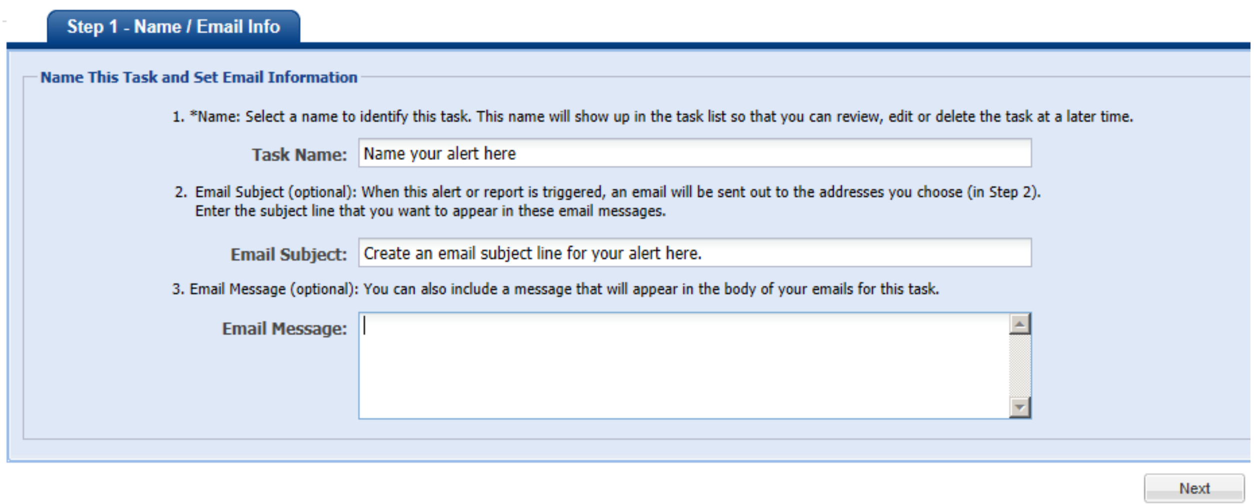


Call Reports	Options						
Best Buy Call Report	Transaction Report	GPS	Escalation	Schedule Reports	Configure	Language Tools	Delete
EB Games Call Report	Transaction Report	GPS	Escalation	Schedule Reports	Configure	Language Tools	Delete
Event Call Report	Transaction Report	GPS	Escalation	Schedule Reports	Configure	Language Tools	Delete
Future Shop Call Report	Transaction Report	GPS	Escalation	Schedule Reports	Configure	Language Tools	Delete
Staples Call Report	Transaction Report	GPS	Escalation	Schedule Reports	Configure	Language Tools	Delete

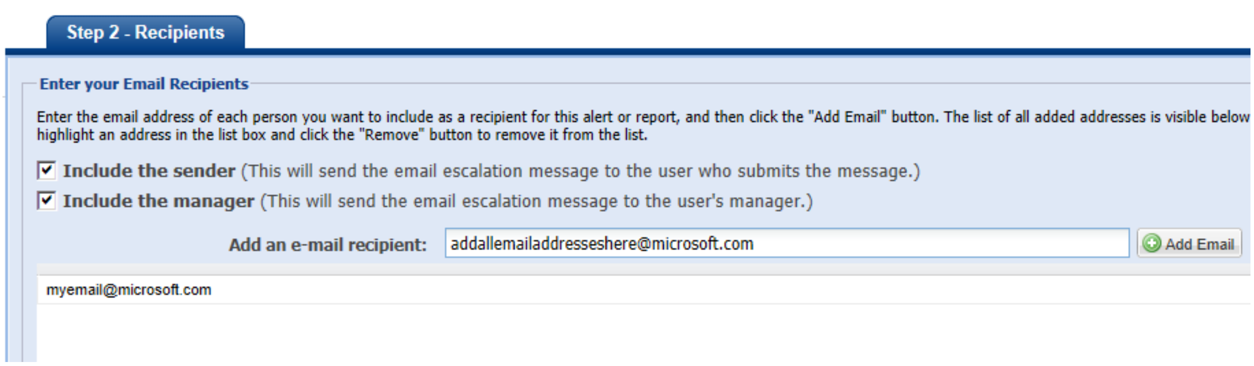
Escalations are used to monitor a particular response to a question and email any one person or multiple people that an event/response was met. For example, if a question says “does this store require immediate management assistance?” Yes or No. If the user selects “Yes”, when the record is submitted, that record will send an alert to the denoted manager. This could be an inventory level to an inventory manager, etc. This is highly open-ended where any item in a form can be set up to trigger an escalation.



Click on **Create a New Escalation Alert**

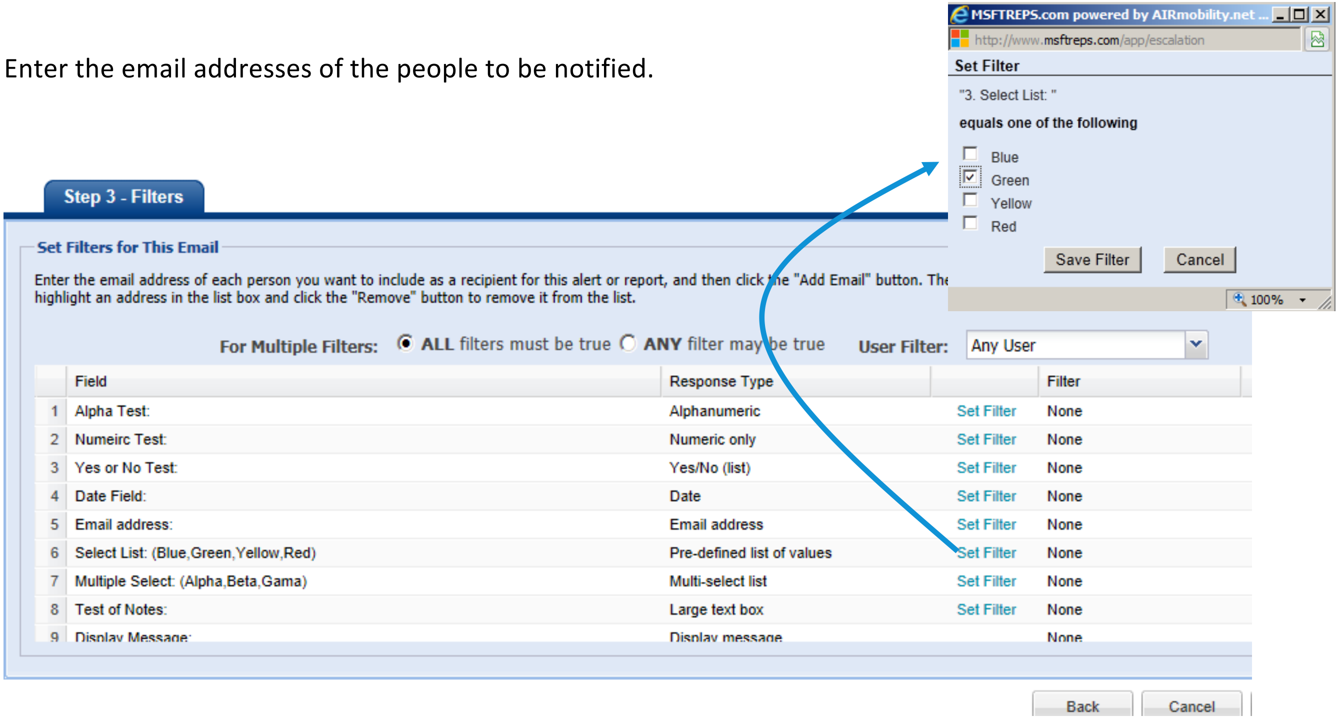


Enter the **Task Name**, **Email Subject**, and the **Email Message** for this escalation. Click the **Next** button to continue.



Check the appropriate boxes to include a copy of the message to both the sender (field Rep that submitted the report) and the manager of the Rep.

Enter the email addresses of the people to be notified.



Select the Set Filter link next to the escalation item. A box will pop up to set the detail. Save this information and select Finish to complete.

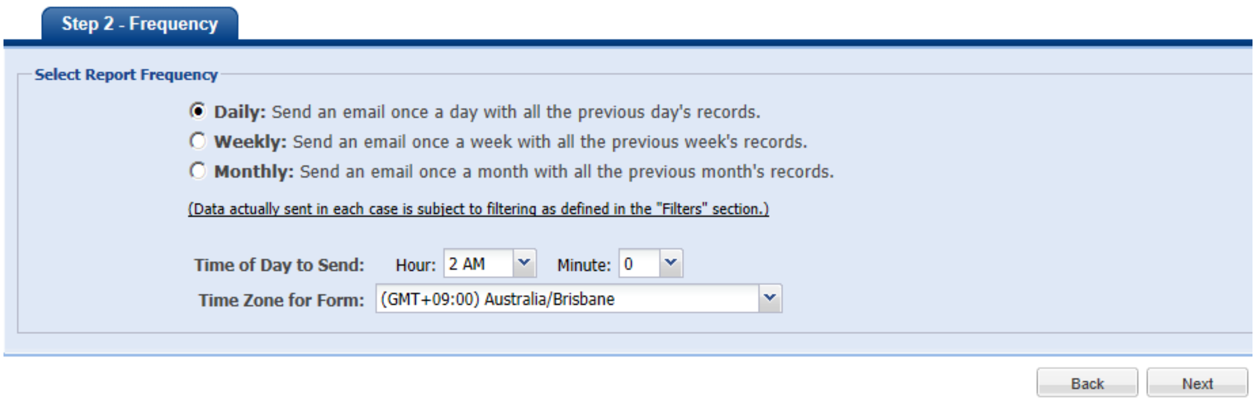
Schedule Reports

Call Reports	Options						
Best Buy Call Report	Transaction Report	GPS	Escalation	Schedule Reports	Configure	Language Tools	Delete
EB Games Call Report	Transaction Report	GPS	Escalation	Schedule Reports	Configure	Language Tools	Delete
Event Call Report	Transaction Report	GPS	Escalation	Schedule Reports	Configure	Language Tools	Delete
Future Shop Call Report	Transaction Report	GPS	Escalation	Schedule Reports	Configure	Language Tools	Delete
Staples Call Report	Transaction Report	GPS	Escalation	Schedule Reports	Configure	Language Tools	Delete

Schedule Reports is very similar to creating an Escalation. See Escalation in this guide for details.

Escalations send a single call report each time the criteria is met. Scheduled reports will group all of the records that meet the criteria and send an Excel attachment containing those records.

In addition to the steps to create an escalation, there is an additional step in the set up wizard:



Reports can be scheduled daily, weekly or monthly, denote the time in which they want the reports to come and in what time zone.

Configure

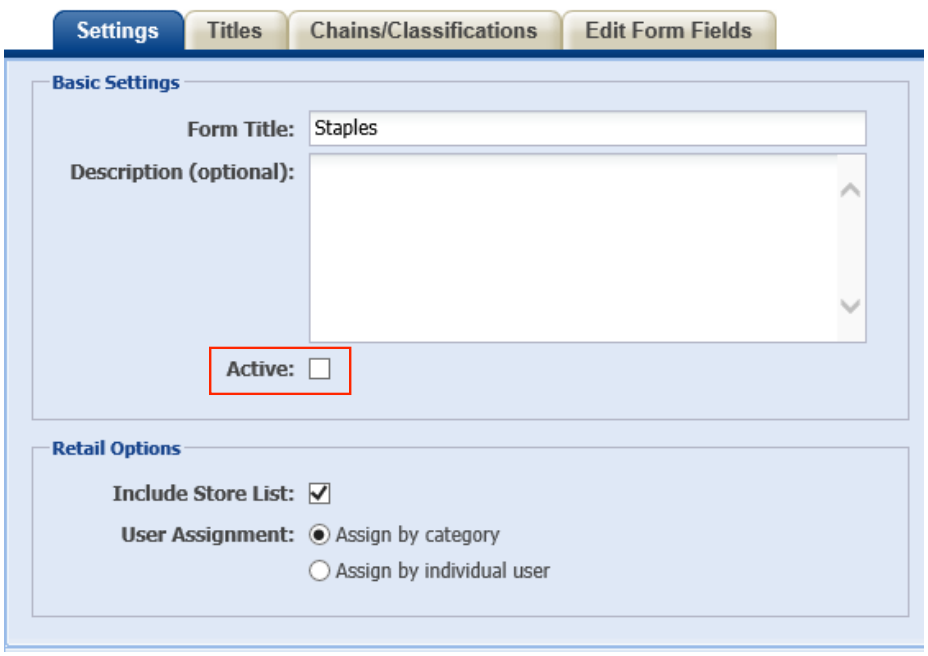
Call Reports	Options						
Best Buy Call Report	Transaction Report	GPS	Escalation	Schedule Reports	Configure	Language Tools	Delete
EB Games Call Report	Transaction Report	GPS	Escalation	Schedule Reports	Configure	Language Tools	Delete
Event Call Report	Transaction Report	GPS	Escalation	Schedule Reports	Configure	Language Tools	Delete
Future Shop Call Report	Transaction Report	GPS	Escalation	Schedule Reports	Configure	Language Tools	Delete
Staples Call Report	Transaction Report	GPS	Escalation	Schedule Reports	Configure	Language Tools	Delete

This option is to modify an existing call report. It allows the addition of items, moving items around and modify some items but not all. For example, a pick list cannot be changed to a numeric or photo field (database limitation).

WARNING: *Currently, deleting an existing question will delete all data that was collected for that question. A method for deleting questions and retaining historical data is being investigated.*

If a question has to be removed and the data needs to be preserved, follow these steps:

1. Create a new call report selecting the current call report as a template. See Create Call Reports section for details.
2. Modify the new report as needed
3. Make the old current call report inactive by unchecking the **Active** checkbox.



Language Tools

Call Reports	Options						
Best Buy Call Report	Transaction Report	GPS	Escalation	Schedule Reports	Configure	Language Tools	Delete
EB Games Call Report	Transaction Report	GPS	Escalation	Schedule Reports	Configure	Language Tools	Delete
Event Call Report	Transaction Report	GPS	Escalation	Schedule Reports	Configure	Language Tools	Delete
Future Shop Call Report	Transaction Report	GPS	Escalation	Schedule Reports	Configure	Language Tools	Delete
Staples Call Report	Transaction Report	GPS	Escalation	Schedule Reports	Configure	Language Tools	Delete

Language tools allow localization of the call report. Refer to the Localization section of this guide for instructions.

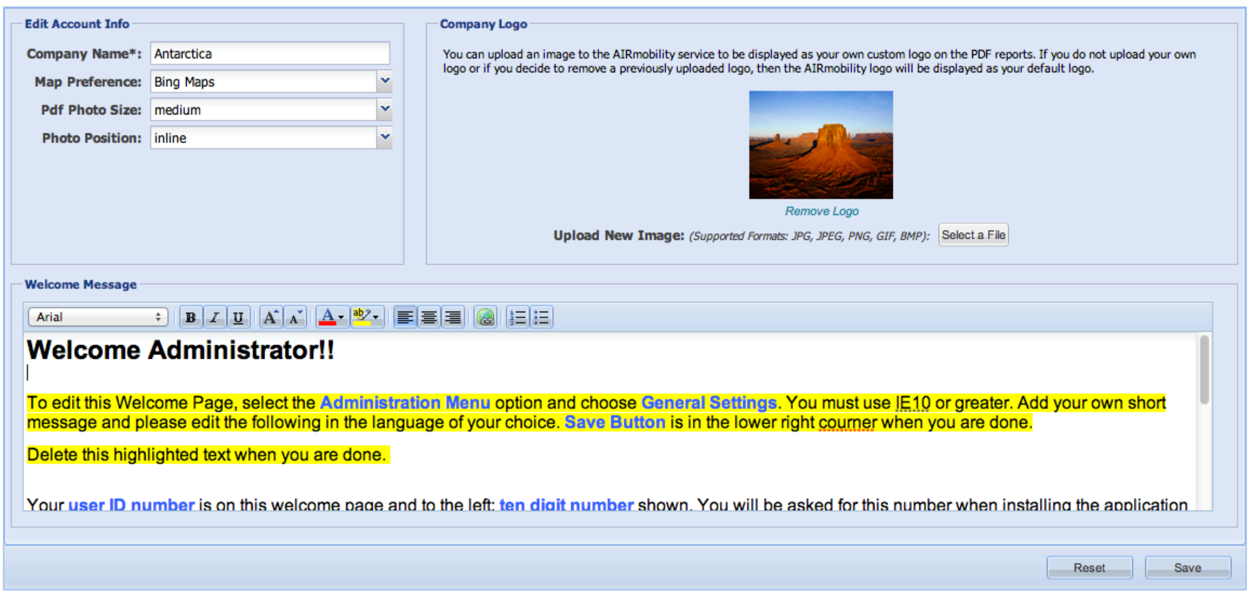
Dashboard

Compliance Dashboard
RSP Training Dashboard
Photo Dashboard
Misc Dashboard
WOTS Dashboard (Word on the Street)

Administration

General Settings

This module is for managing the welcome message for the Reps, and default settings for transaction reports in the REP system.



Edit Account Info

Company name: Country

Map Preference: Bing

The following options affect photos in PDF reports:

> **Pdf Photo Size**: Small, Medium, or Large. This is the size of the photos taken in a call report as they appear in a PDF report.
>
> **Photo Position**: Inline or end. Inline will keep the photos in the same order as the call report questions. Selecting End will put all photos at the end of the report.

Company Logo

The REP system logo appears in the header of PDF reports.

Welcome Message

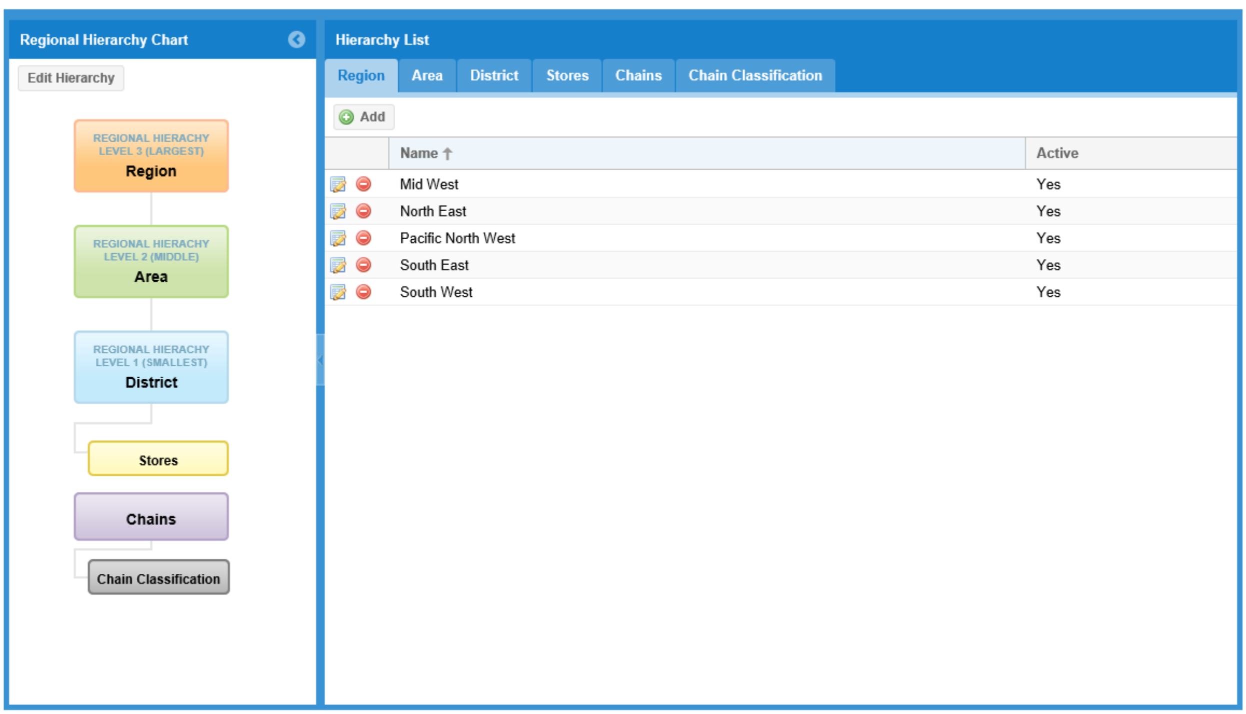
This is the message reps will see when they click on the Welcome and Setup icon on the home screen. It can be used to customize a message to them. It accepts rich text, so localized content can be placed here.

Database Management

This module is for managing retail stores and chains, users and their store assignments in the REP system.

Store Management

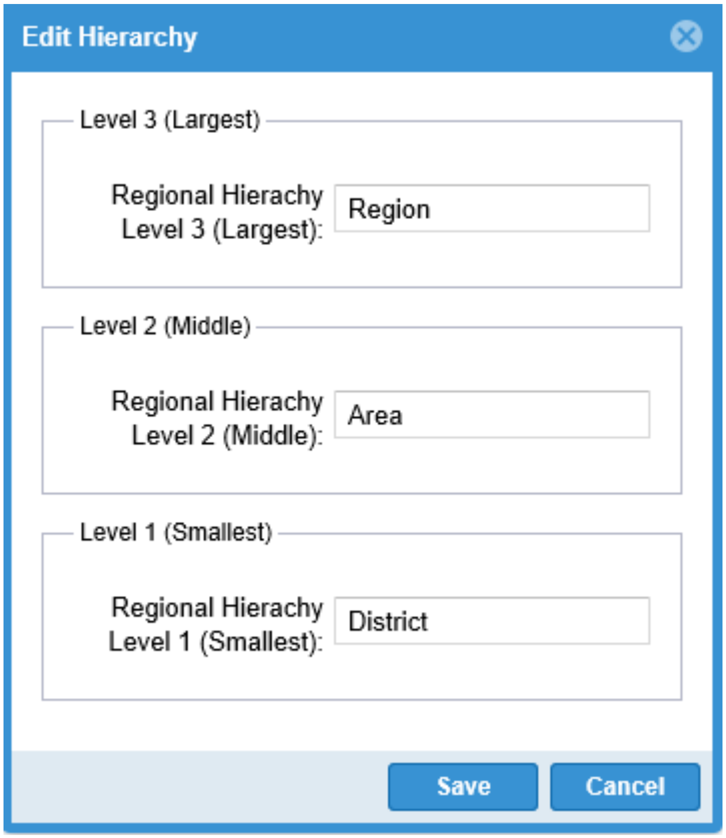
This module allows the maintenance of the regional hierarchy and the retail environment. Each country has a unique structure and all options detailed below may not apply. The initial setup of this data is created from the data contained in the Roll Up file that was submitted.



Regional Hierarchy Chart

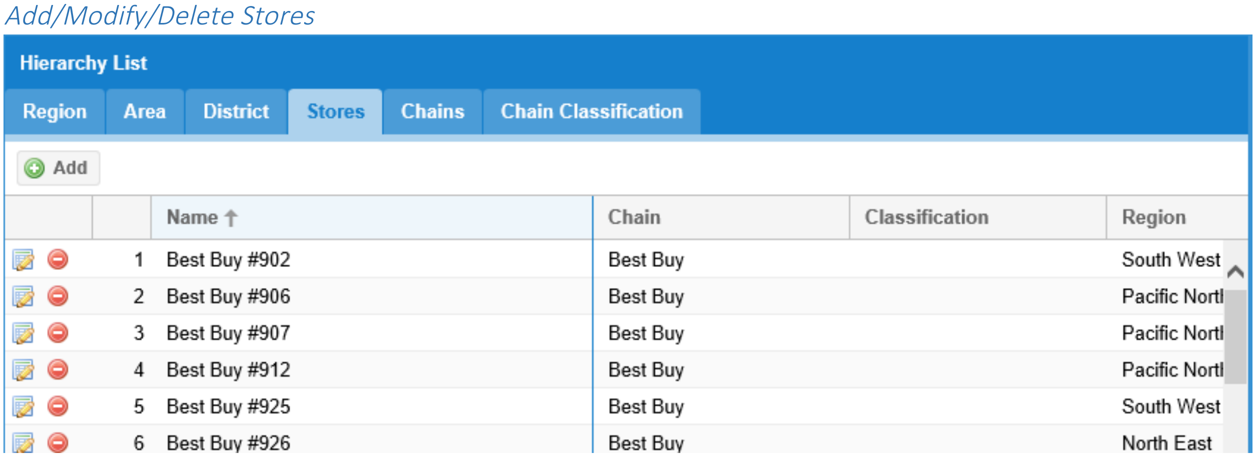
This hierarchy is dependent on the structure of the field labor team and the requirements for reporting. Currently, there must be at least one region and the maximum is three. Each level in the hierarchy represents another filter in reporting. In the example above, there are 3 levels that represent a District that a rep covers. Then there are Areas that include multiple reps, and final multiple areas are grouped into Regions.

To edit the hierarchy, click on the **Edit Hierarchy** button on the top left of the screen.



Click **Save** when finished.

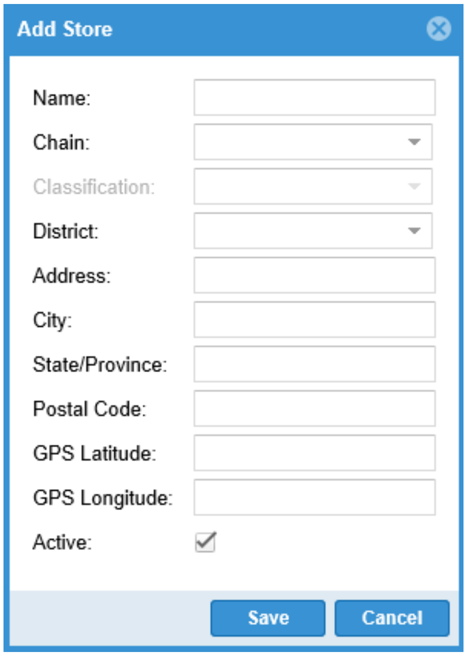
Add/Modify/Delete Stores



Selecting the **Stores** tab displays a list of stores loaded into the system from the Roll Up file.

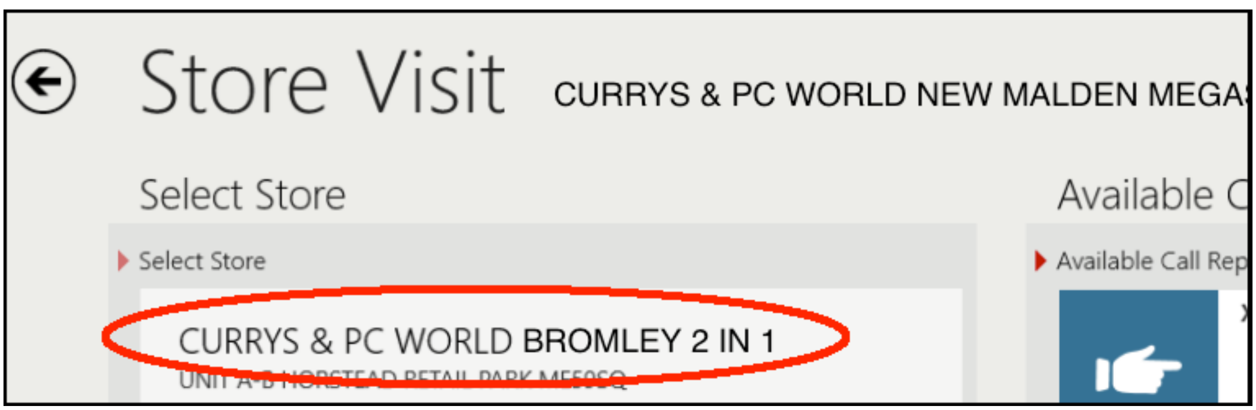
Add a Store

To add a store to the list, click on the **Add** button.



Enter a display name for the store in the **Name** field. This is how the store name will display both online and as a pick list on each mobile device. This name should be unique and descriptive for the rep. STORENAME #1, STORENAME #2, etc. An example would be to use the Chain and Store Number like: Currys #152, or using the chain and store number with a city: Currys #152 London.

Note: The address of the store will also be listed for further identification in the user application.



Select the **Chain** for the store from the drop down list.

Select **Classification** (if used) from the drop down list.

Select **District** (this will be customized to your hierarchy, but will always be the lowest level).

Enter in the address information in the appropriate fields. GPS information is not required.

Click on **Save** when finished.

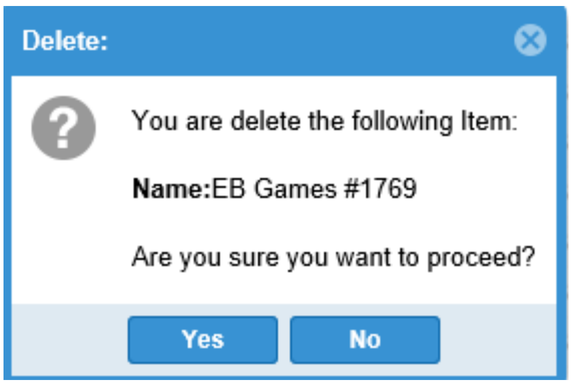
Modify a Store

To change information about a store or make it inactive, click on the edit button to the left of the store name . Edit information as needed and click on the **Save** button when complete.

Delete a Store

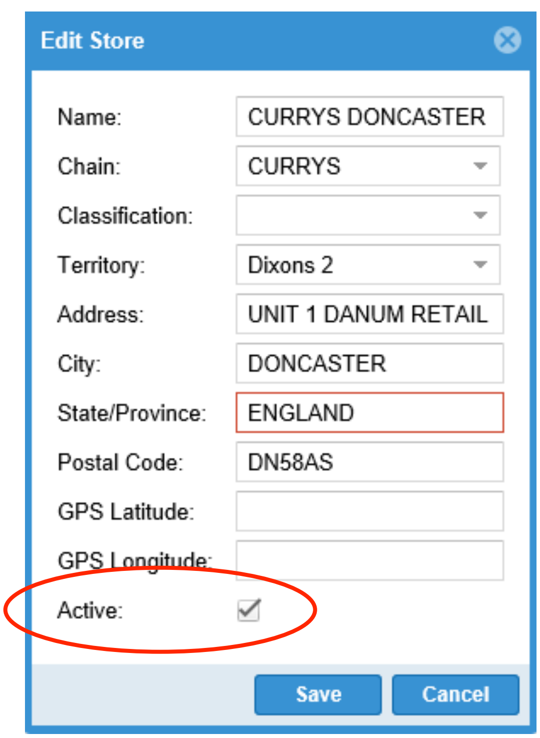
WARNING: Currently, deleting a store removes any historic data associated with that store. A solution to allow deleting while preserving the historical data is being investigated.

If a store is no longer needed in the system, click on the delete button .



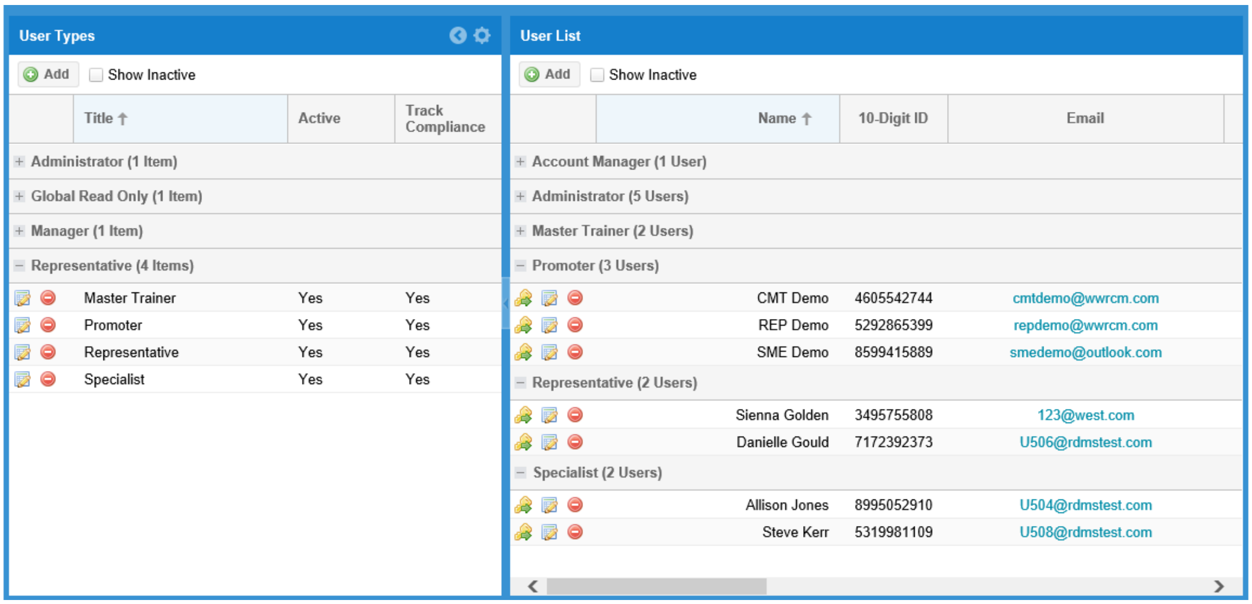
Click **Yes** to delete the store, or click **No** to keep the store.

If a store is no longer visited, it is advised to mark them Inactive. Click on the check mark next to **Active** to clear the box and make the store inactive. At a future date they can be made active again by clicking the blank box.



User Management

This module allows the maintenance of the management hierarchy and the users of the system. Each country has a unique structure and all options detailed below may not apply. The initial setup of this data is created from the data contained in the Roll Up file that was submitted.



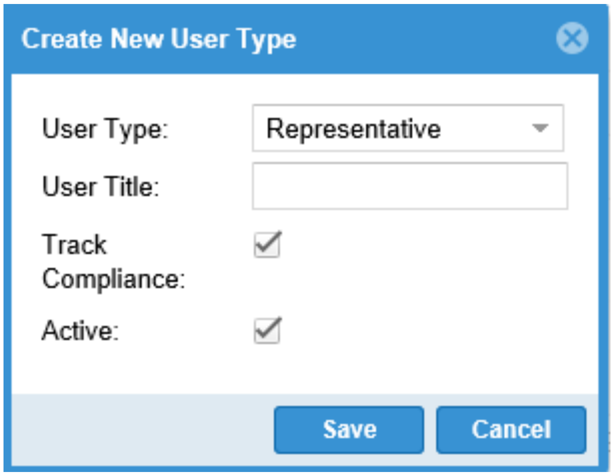
User Types

On the left portion of the screen is the different user types for the country.

- Administrator
  - Full access to all information in the country
- Read Only
  - Guest of the system that can view dashboards only
- Managers
  - Created from the Roll Up file
  - Reps are assigned to managers
  - Managers can view the data submitted by the reps assigned to them
- Representatives
  - Field Reps that visit the stores and conduct training
  - Call reports can be created for different Representative types. Creating multiple rep titles based on their job functions allows call reports to be targeted specifically at the duties of that rep.

Add New User Type

To add a new user type, click on the **Add** button below User Types.



Select the User Type from the drop down list

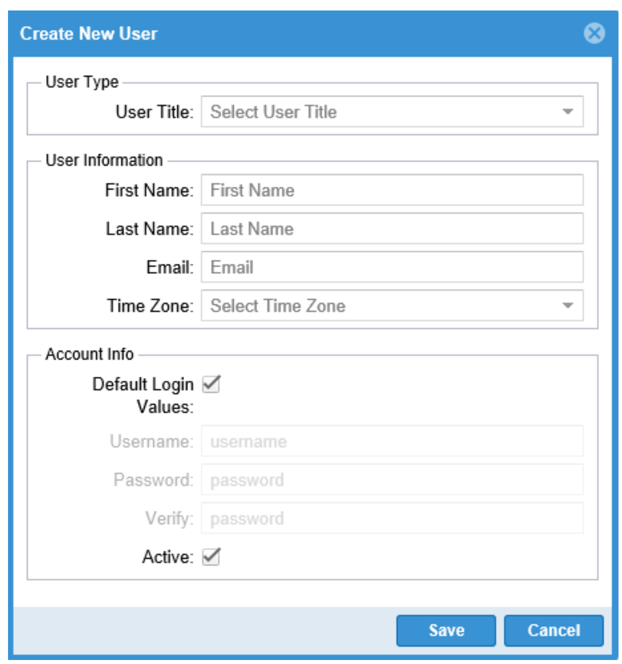
Enter a name for the User Type.

Track Compliance – if this item is checked then this user type is included compliance tracking. If it is unchecked, they will not see **Store Visit Call Reports** in the application. Admins, managers and Trainers should not have tracking enabled.

Active – A User Type can be made inactive if they are no longer used. This is useful for temporary user groups (promotion staff, holiday temporary workers, etc.

Add a New User

To add a user to the system, click on the **Add** button below User List.



Select the **User Title** from the drop down list.

Enter the user's **First Name**, **Last Name** and **Email** address.

Select the **Time Zone** from the drop down list.

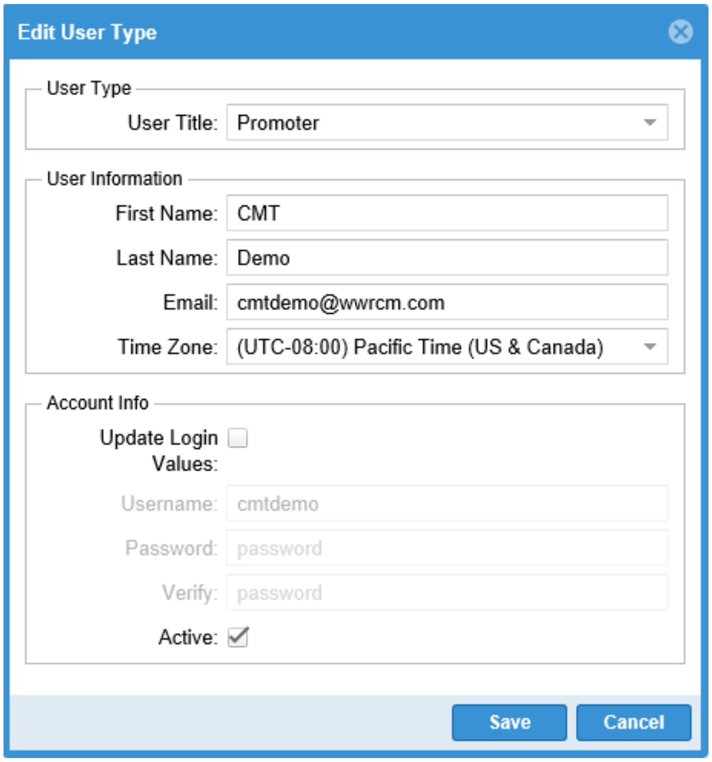
Default log in values are the first initial of their first name, and their full last name. Example: John Doe would be **jdoe** for both the username and password on the first login to the system. The user will be prompted to change their password and set up a security question.

These can be updated by clicking on the check box next to Default Login Values and changing the information.

Click **Save** when complete.

Modify a User/Change password

To change information about a user or make them inactive, click on the edit button to the left of the user name . Edit information as needed and click on the **Save** button when complete.

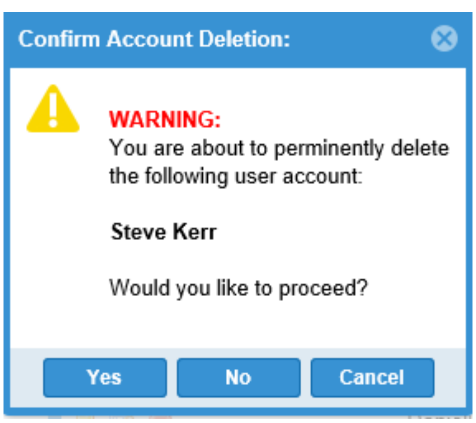


To change their password, click on the check box next to **Update Login Values** and enter in the new username and password values and click **Save.**

Delete a User

WARNING: Currently, deleting a user removes any historic data associated with that user. A solution to allow deleting while preserving the historical data is being investigated.

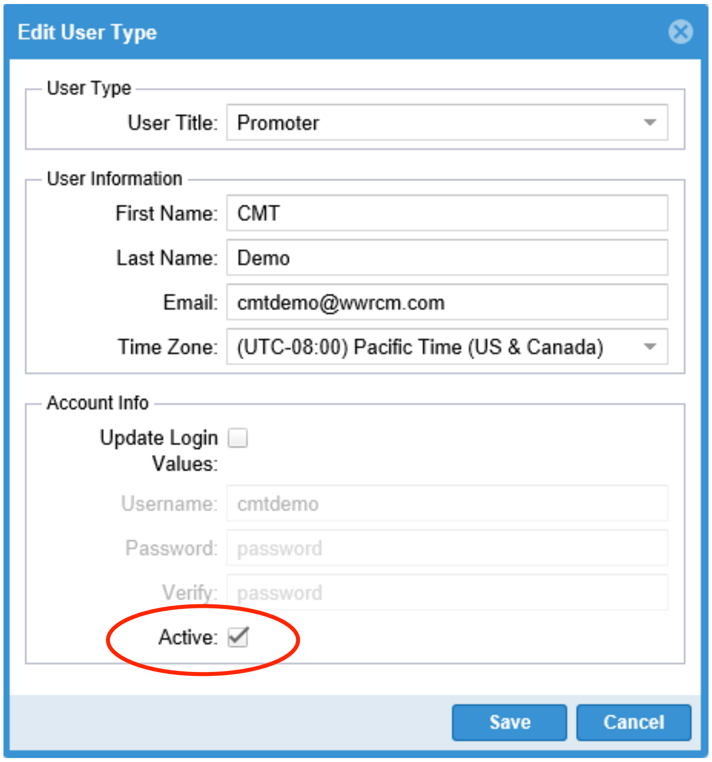
If a user is no longer needed in the system, click on the delete button



Click **Yes** to delete the user, or click **No or Cancel** to keep the store.

Make a user inactive

If a user is no longer working, it is advised to mark them Inactive. Click on the modify button

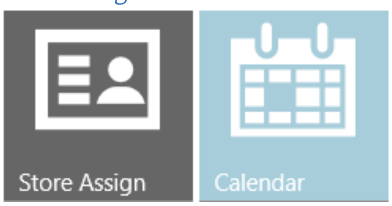


Click on the check mark next to **Active** to clear the box and make the user inactive. At a future date they can be made active again by clicking the blank box.

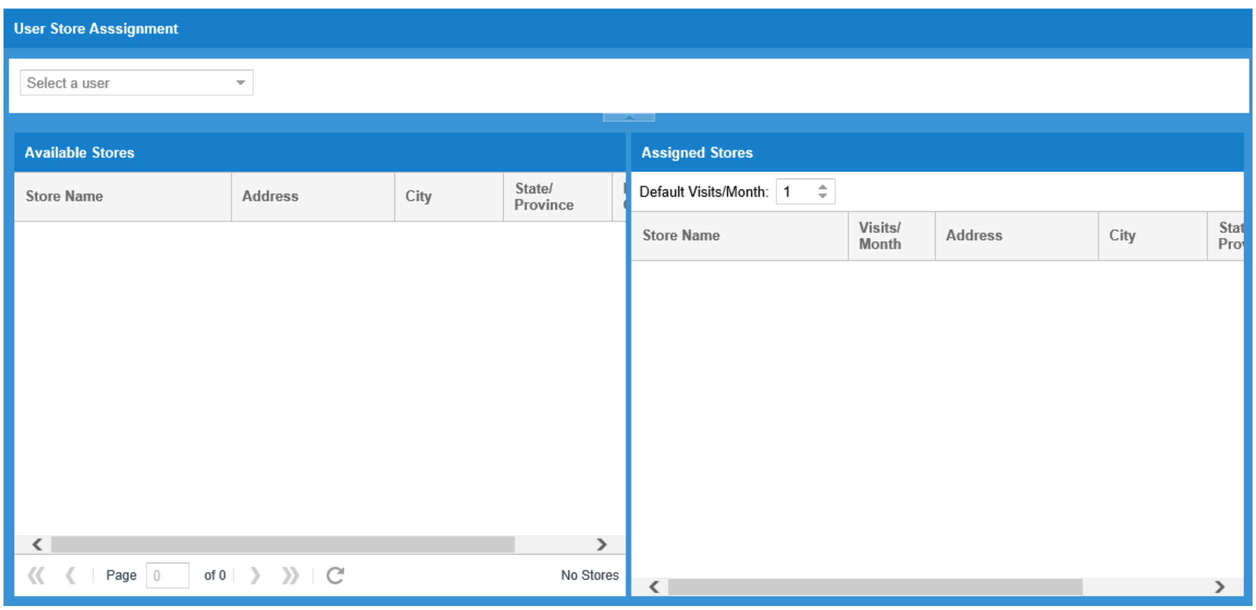
Assignments

This module includes the functions to assign stores to reps and use a calendar to graphically assign those store to a monthly calendar.

Store Assignments

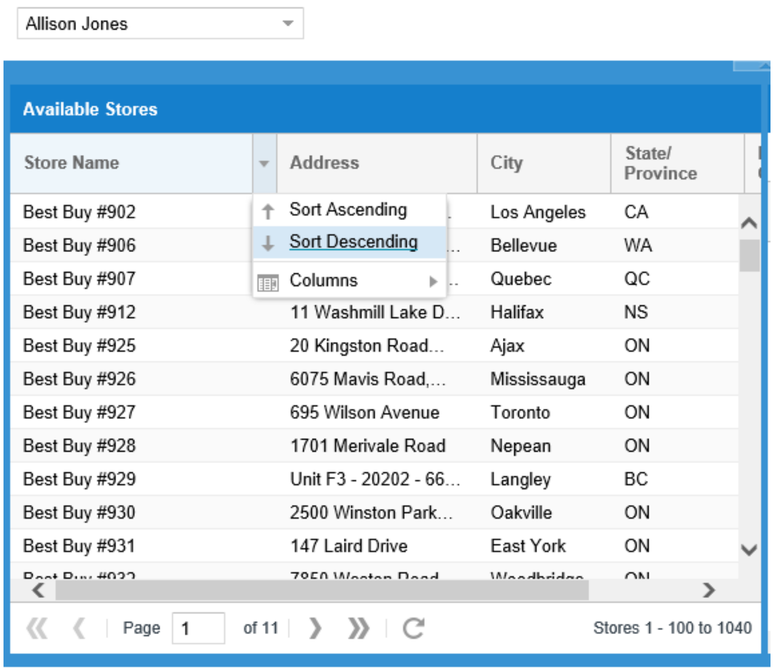


Store assignments define the stores that the reps cover. In the Roll Up file, only one user per store was allowed because the file builds the store and user hierarchy. Once a user is added to the system, they can be assigned to a store that already has coverage.

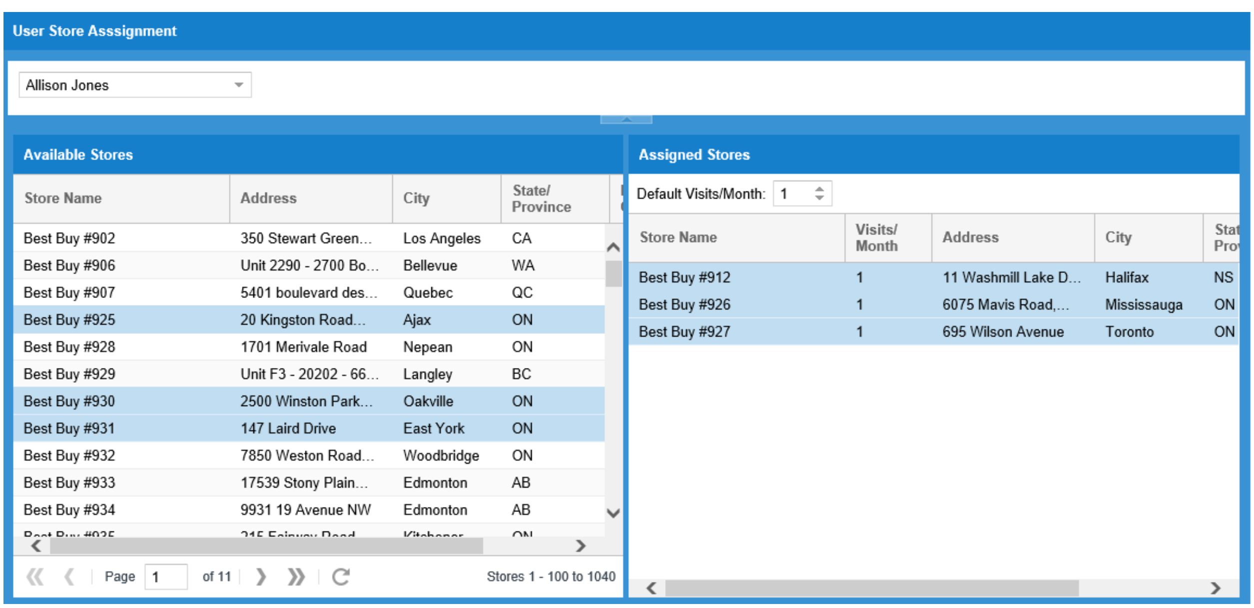


Select a user from the drop down menu.

A list of all stores in country will be listed in the left column. Similar to Excel, the fields can be sorted by clicking the arrow to the right of each field name.



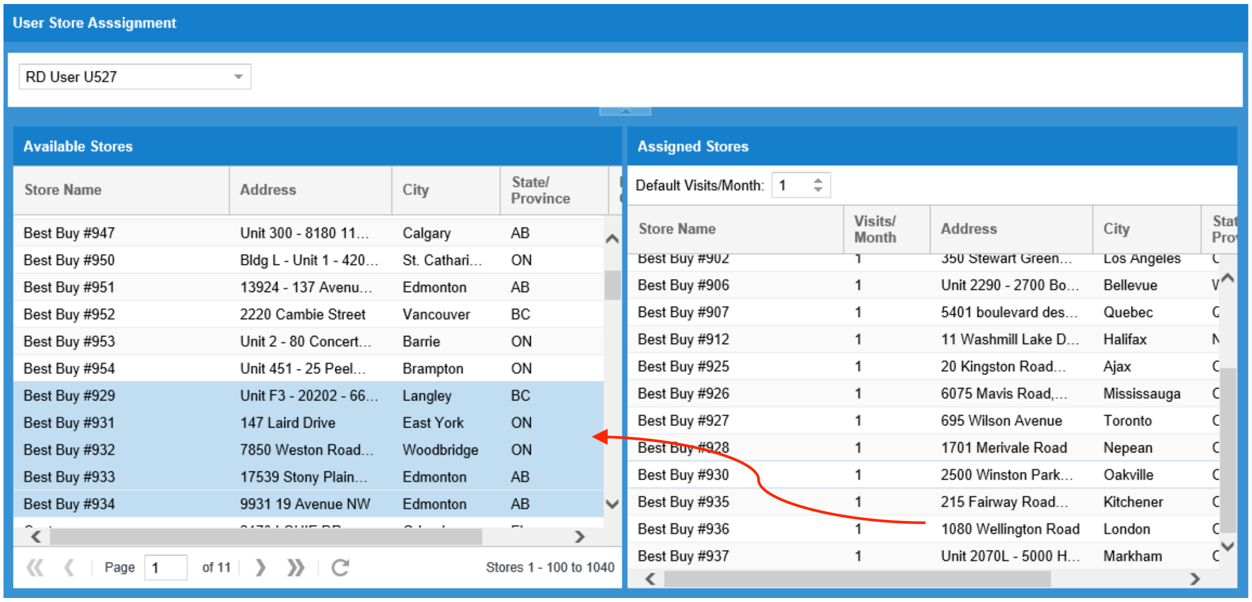
To assign stores to a rep. Select a store by clicking on that store's line and drag it to the right side of the screen. Multiple stores can be select by holding the Ctrl key while clicking



Ranges of stores can be selected by holding the Shift key and clicking on the first store then clicking on the last store in the range needed. Then drag those selections to the right side of the screen.

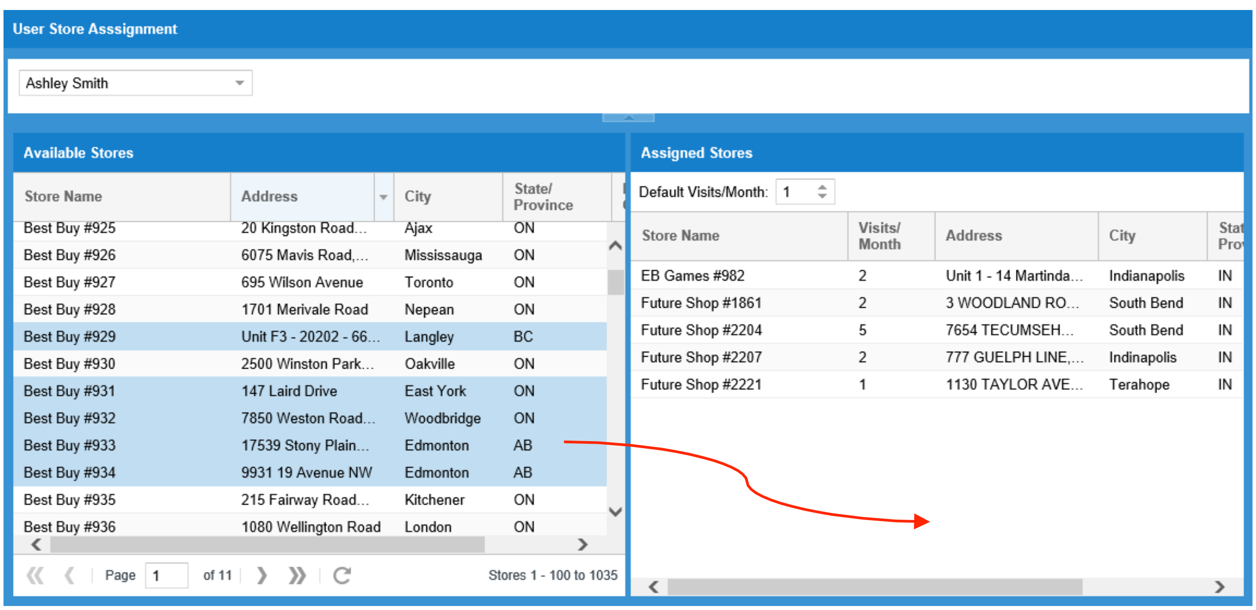
To remove a store from a rep, click on the store in the Assigned Stores list and drag it back to the Available Stores list. The same select options work with removing assigned stores as with assigning them.

Quick Tip: If stores are being assigned to another rep, after they are selected and slid back to the Available Stores list, they remain highlighted.

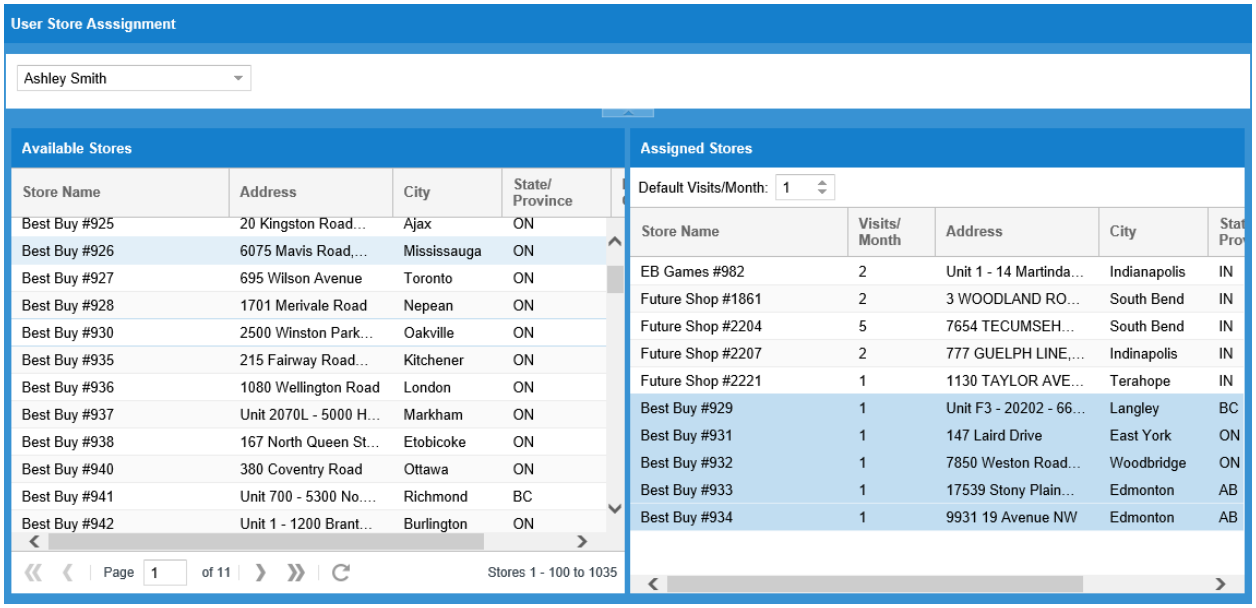


Before clicking on anything else, select the new reps name from the drop down list.

The stores remain highlighted. Click and hold one of the highlighted stores and drag them to the new user's Assigned Stores list



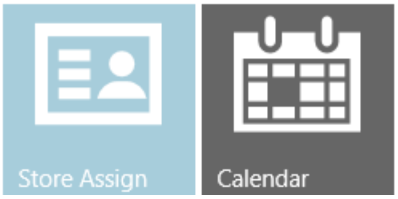
Those stores will now be assigned to the new user.



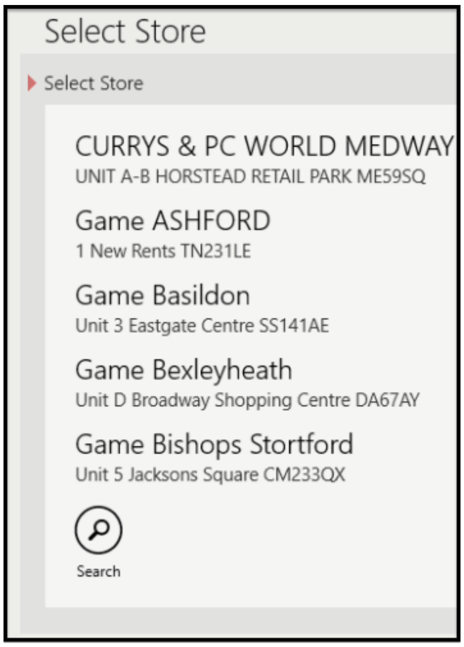
Store Name	Address	City	State/ Province
Best Buy #925	20 Kingston Road...	Ajax	ON
Best Buy #926	6075 Mavis Road,...	Mississauga	ON
Best Buy #927	695 Wilson Avenue	Toronto	ON
Best Buy #928	1701 Merivale Road	Nepean	ON
Best Buy #930	2500 Winston Park...	Oakville	ON
Best Buy #935	215 Fairway Road...	Kitchener	ON
Best Buy #936	1080 Wellington Road	London	ON
Best Buy #937	Unit 2070L - 5000 H...	Markham	ON
Best Buy #938	167 North Queen St...	Etobicoke	ON
Best Buy #940	380 Coventry Road	Ottawa	ON
Best Buy #941	Unit 700 - 5300 No....	Richmond	BC
Best Buy #942	Unit 1 - 1200 Brant...	Burlington	ON

Store Name	Visits/ Month	Address	City	Stat Pro
EB Games #982	2	Unit 1 - 14 Martinda...	Indianapolis	IN
Future Shop #1861	2	3 WOODLAND RO...	South Bend	IN
Future Shop #2204	5	7654 TECUMSEH...	South Bend	IN
Future Shop #2207	2	777 GUELPH LINE,...	Indinapolis	IN
Future Shop #2221	1	1130 TAYLOR AVE...	Terahope	IN
Best Buy #929	1	Unit F3 - 20202 - 66...	Langley	BC
Best Buy #931	1	147 Laird Drive	East York	ON
Best Buy #932	1	7850 Weston Road...	Woodbridge	ON
Best Buy #933	1	17539 Stony Plain...	Edmonton	AB
Best Buy #934	1	9931 19 Avenue NW	Edmonton	AB

Calendar



Currently the Calendar function is limited to managing the store list that the rep sees on their device. Additional functionality is being investigated and will be incorporated into future releases.



Admins can schedule all reps, managers can scheduled reps assigned to them, and reps can manage their own calendar

If no modifications are using the calendar, then the rep will always see all stores assigned to them in the application.

To have the store list only display the stores to be visited that day, stores can be entered into the monthly calendar.

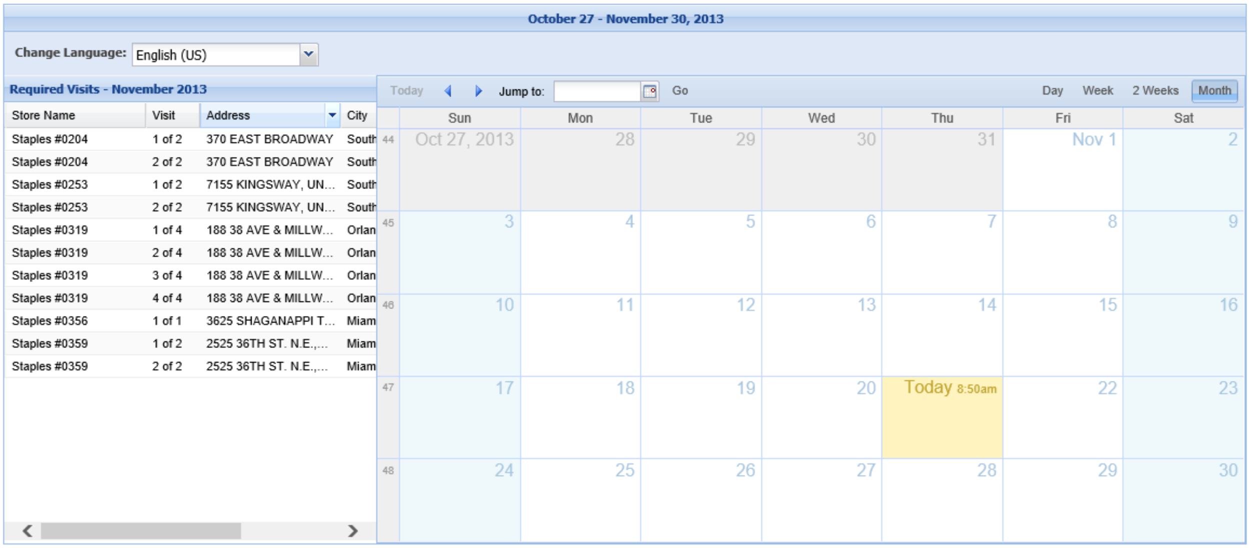
All stores assigned are listed on the left. If a store is required to be visited more than once in a month, that store will be repeated in the list. For example, if a user is to visit Retail Super Store 4 times in a month, this would list 4 times as:

Retail Super Store 1 of 4

Retail Super Store 2 of 4

Retail Super Store 3 of 4

Retail Super Store 4 of 4



This is a drag and drop interface. Drag all stores assigned onto the calendar days in which they are to be visited. As stores are added to the calendar, they will be removed from the required visits column. To remove a store from the calendar, right-click on the store and select delete. The store will move back to the required visits column.

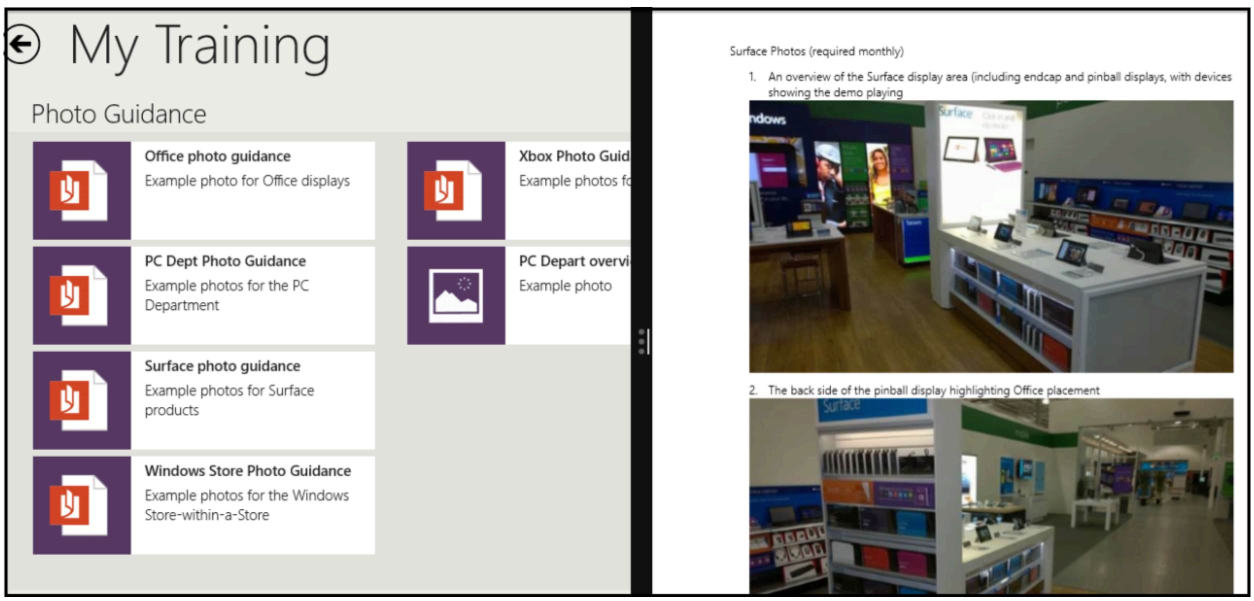
We default the first visit at 7AM and list all others added at a 30 minute increment. This can be edited to more specific times; but the calendar in this implementation is a daily planner with monthly compliance requirements.

Resource File Management

In this module, localized copies of files used by the Reps in the stores can be managed. This can include:

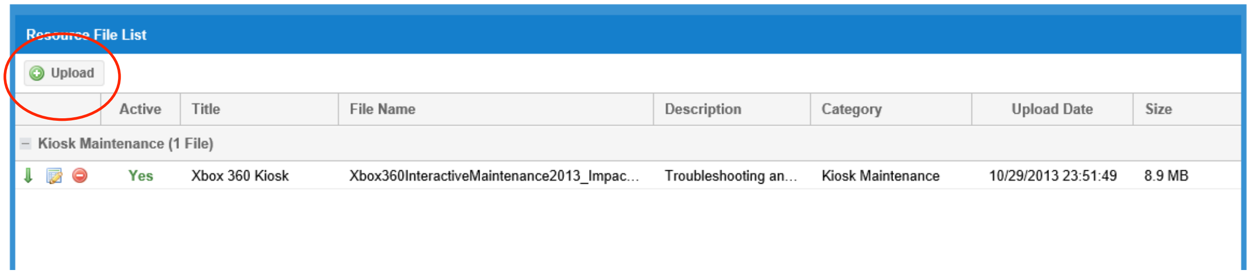
- Plan-o-grams
- Kiosk maintenance and setup instructions
- Demo installation instructions
- Training resources for the Reps

Currently, for the best viewing experience in the REP application it is recommended to utilize PDF, JPG and WMV files. These file types invoke the built-in Windows applications (Reader, Photos and Video respectively) and resize the screen appropriately. This maintains the modern look and feel of the application:



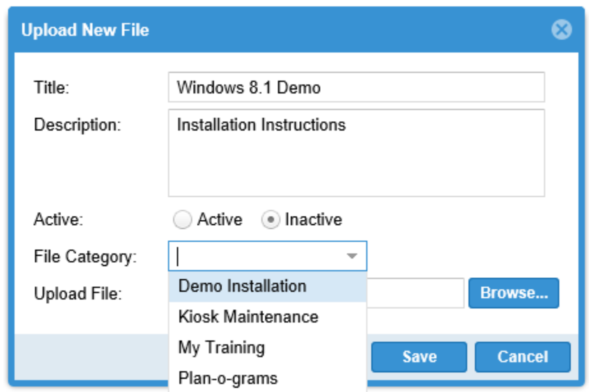
The system can support any file type that the PC can load with an associated application, but it will jump to the desktop application and the user will have to swipe back into the REP application after viewing.

When entering the Resource Manager, a list of files that are locally available to use will be visible. To add a new file, click on the upload button.

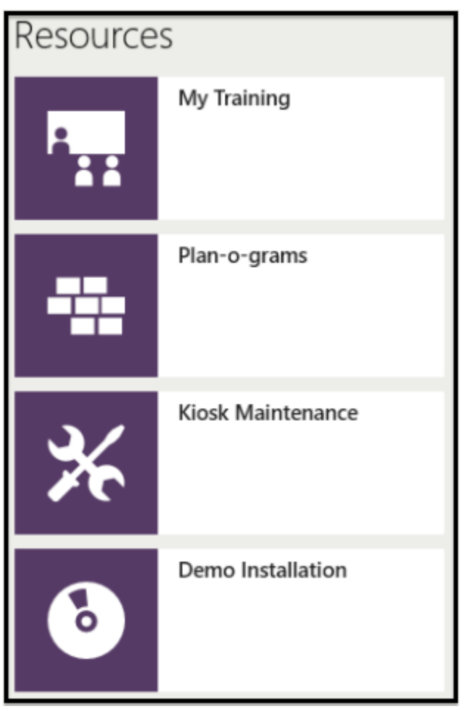


In the Upload New File dialog box, enter the Title and Description.

Then select whether the file is Active or Inactive. If a file is marked as Active, it will download to the Windows Application the next time it synchronizes.

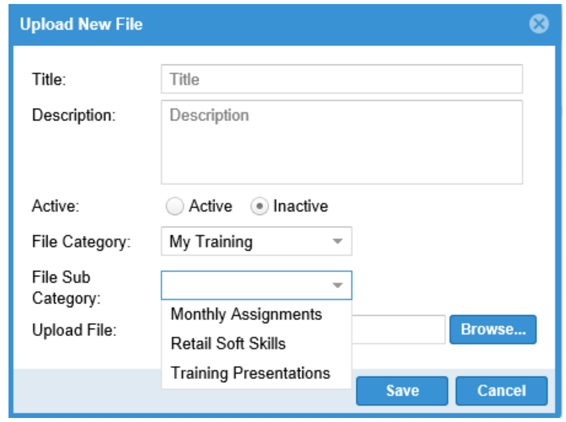


Chose a File Category. These map to the Windows App home screen sections under Resources.



When selecting My Training an additional option to select a File Sub Category is available.

My Training is divided into those sections, plus it contains links to all of the resources that are available for RSP training. This allows the rep to review the RSP Training material without having to be in a call report.



Click on the Browse button and select your file.

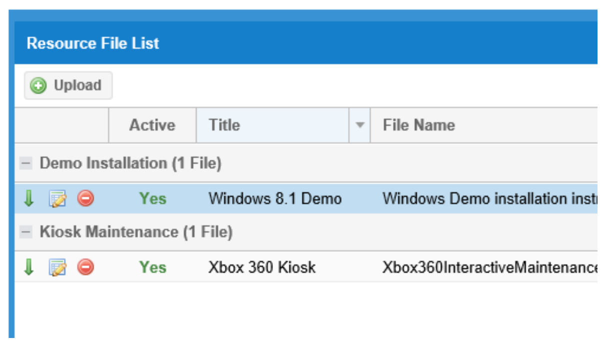
Note: *Files are limited to 50Mb or less, and your total file uploads cannot exceed 300Mb. For comparison: November 2013's Training guidance is a total of 135Mb of files.*

Click Save when done.

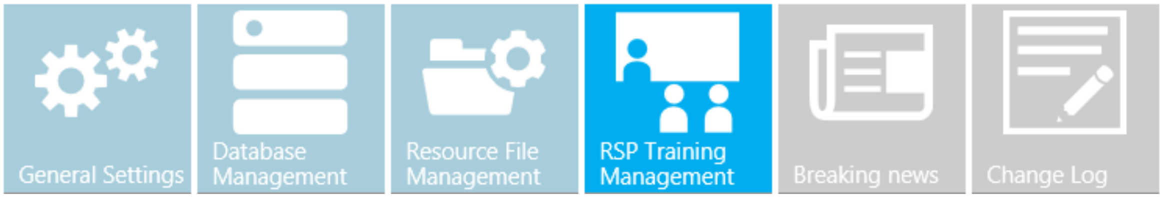
To remove a resource when it is no longer needed, click on the button.

To download a file for viewing, click on the button.

To Edit a file or upload a new copy, click on the button.



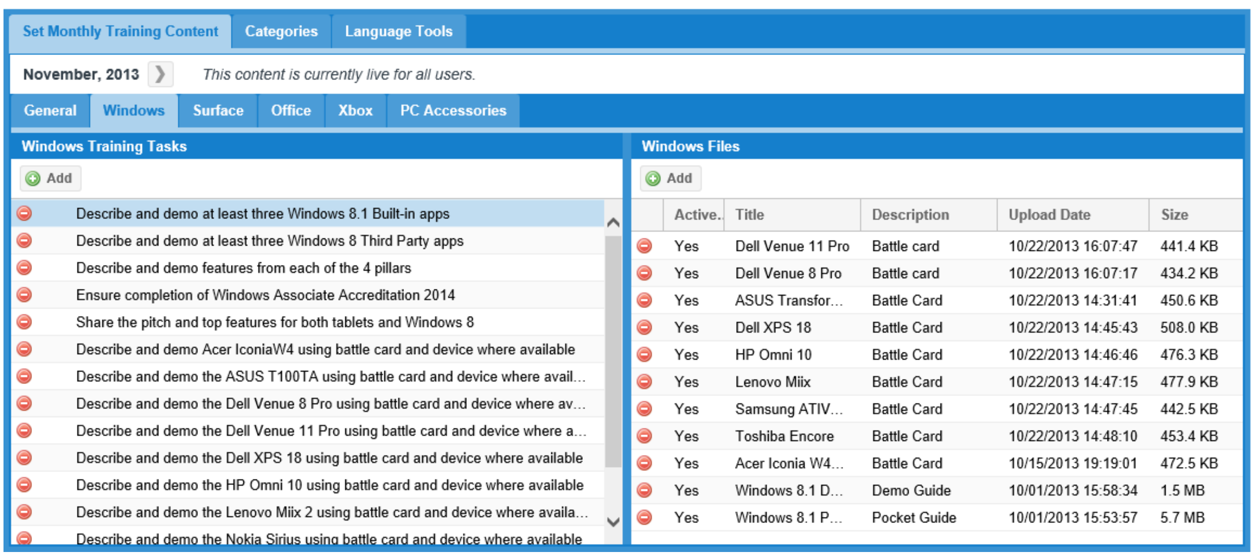
RSP Training Management



RSP Tasks and Files

This module allows the maintenance of the Monthly Training Guidance and the resources that will be used to train the RSPs in store. Add and remove training tasks and resource based on the availability locally. Localized content can also be uploaded to replace the default English content. All content included in the monthly guidance can be found on www.microsoftrad.com.

Each month, the training guidance is pre-loaded into the REP system.

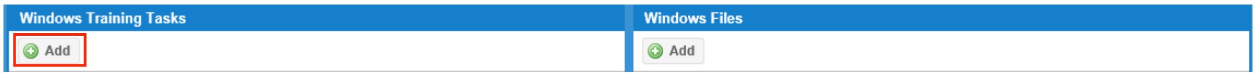


In the left hand column are the training tasks that the field Reps will convey to the RSPs. On the right hand side are resources that facilitate the training tasks. There may not be a 1 to 1 match of training tasks to resources.

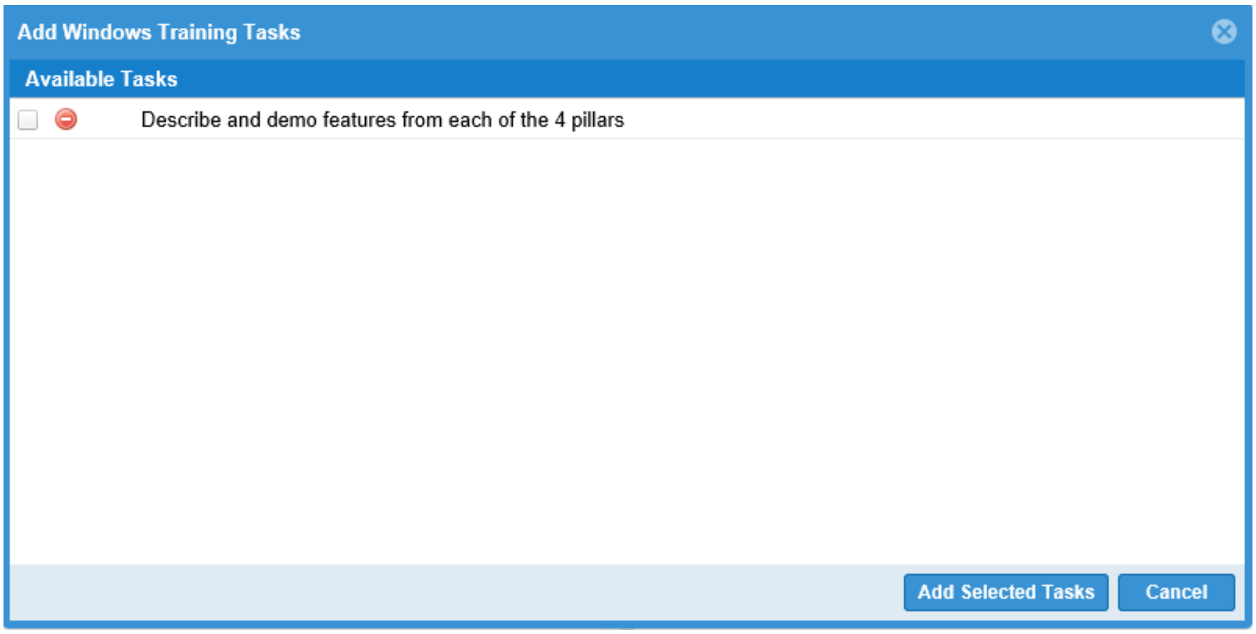
To remove items from the training tasks or the associated files, click on the graphic to the left of each item.

Note: Currently, t*he ability to add new tasks is not available. RSP Training tasks are mapped to Global KPI's and we are investigating a method to allow additional local training tasks to be added and mapped properly to those KPIs.*

If a task was removed and is needs to be restored, click on the **Add** button on the top left.

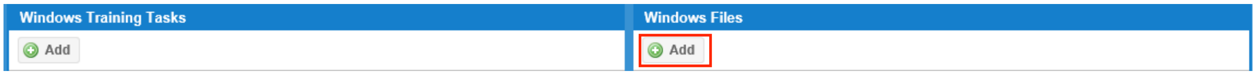


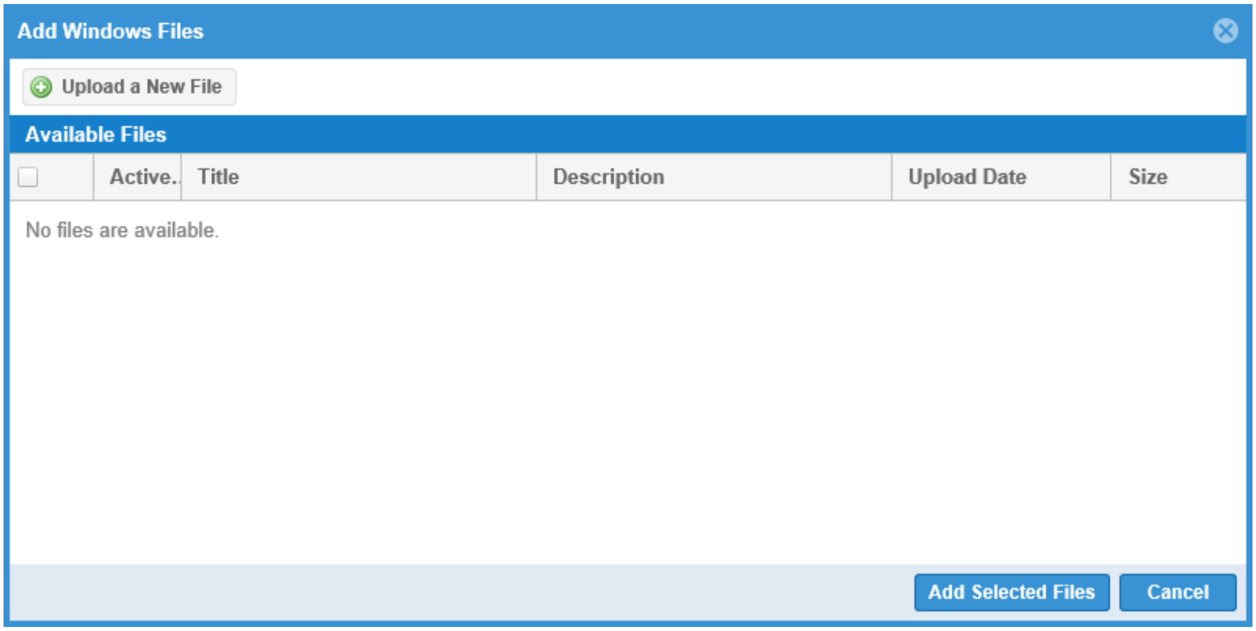
When adding tasks, there is list of unused tasks from the monthly training guidance.



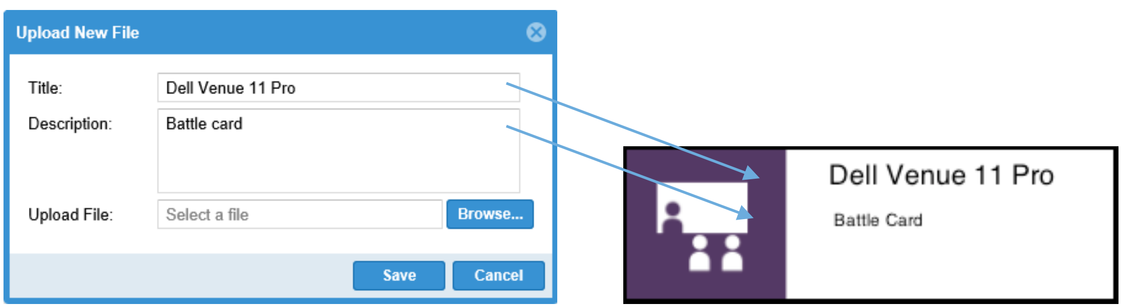
Select the tasks needed by clicking on the box to the left of the available task. When finished click on **Add Selected Tasks**.

If there are additional resources to upload, or localized resources, add them by clicking on the **Add** button on the top right.



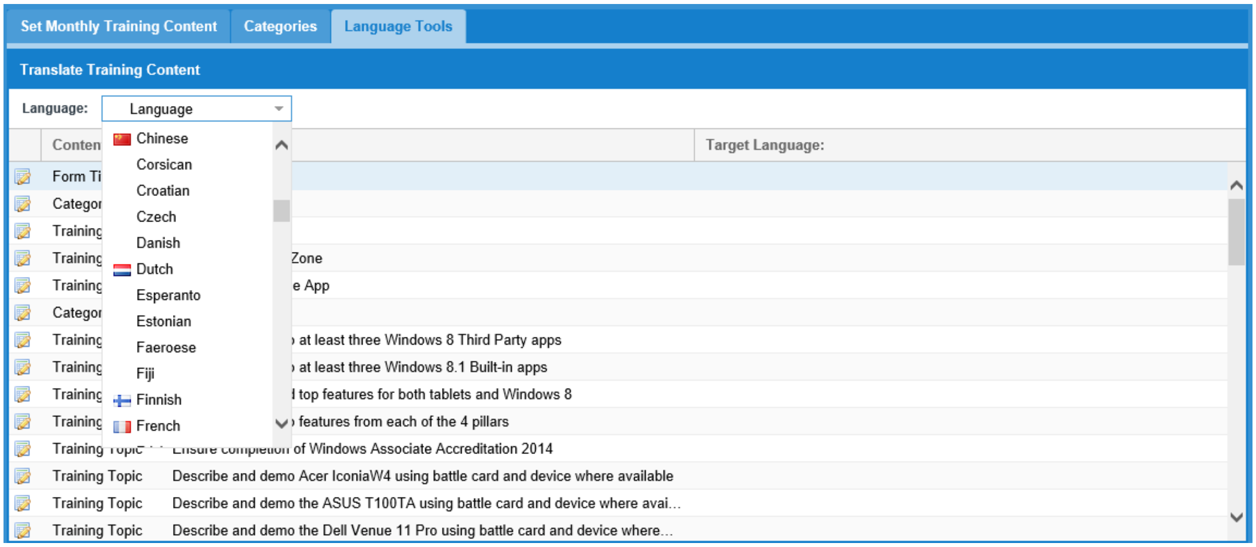


Previously added files will appear in the Available Files list. To add new files, click on **Upload a New File** button.



Enter a **Title** and **Description** that will appear on the resource tile in the application. Click on the **Browse** button to select your file. Click **Save** when finished.

To localize the training tasks, click on the **Language Tools** tab.



This process is identical to the localizing a call report. Select a language from the drop down list, and double-click on each item and enter the translation. See the Localization section in this guide for more information.

RSP Database Manager

Coming FY14H2

The RSP Database Manager will allow the maintenance of RSP records including removal of RSP names that are no longer working in the retail stores.

Breaking News

Breaking news is used to inform the reps of new product and other locally relevant information. Each country has the ability to create their own Breaking News. Global Breaking News will be available to accept or reject based on product availability or relevance to your region. If needed, the information can be localized before activating it to be displayed on the reps device.

Breaking News displays on the REP application home screen. It is a scrolling list of items sorted by newest first. Items will expire after 90 days, and be removed from the list.

The Breaking News module will list all breaking news created locally and any news items that have been created by the corporate team. Items create by the corporate team will be marked as inactive to allow verification of relevance by each country. This also allows the country administrator to have the item localized and even replace the picture associated with the news item.

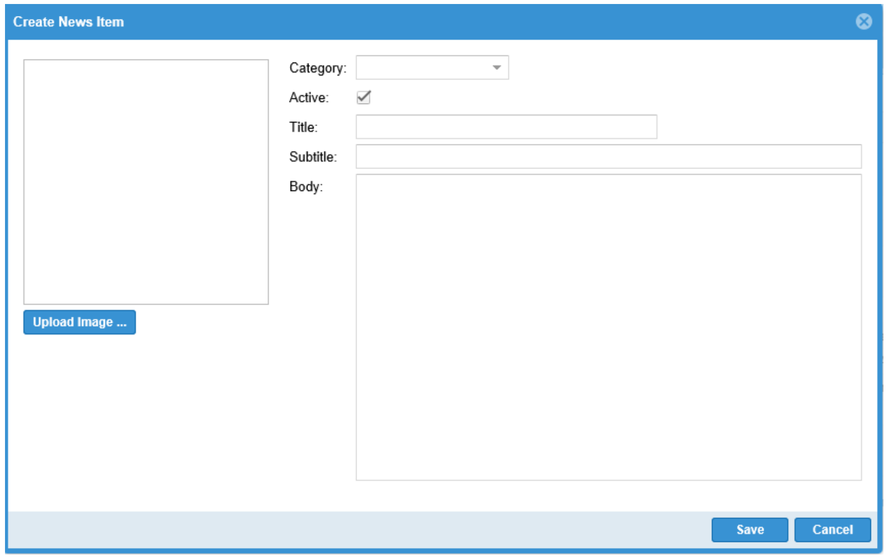
Breaking News

News Items | Categories | Language Tools

Create New Item

Active	Date/Time	Category	Title	Subtitle
No	01/23/2014 05:32 PM	General	New REP Application update	version 1.0.0.93
Yes	12/10/2013 02:02 AM	Surface	New York Times: Microsoft Produces a Win...	
Yes	12/10/2013 02:01 AM	Office	One more reason Microsoft Office will kill Go...	Dec 4, 2013
Yes	12/10/2013 02:01 AM	Office	Shared Benefits feature is coming in January	
Yes	12/10/2013 02:01 AM	Xbox	Tomb Raider Definitive Edition	Announce Trailer
Yes	12/10/2013 02:00 AM	Xbox	Peggle 2 now on Xbox One	
Yes	12/10/2013 02:00 AM	Xbox	Halo: Spartan Assault Comes to Xbox One...	
Yes	12/10/2013 01:59 AM	Xbox	Xbox One hits one million sold – THANK YOU!	Xbox One is Biggest Launch in Xbox History: More Than One Million...
Yes	12/10/2013 01:57 AM	Windows	Windows XP end-of-life coming in April	Windows XP SP3 and Office 2003 Support Ends April 8, 2014
No	12/10/2013 01:56 AM	Windows	NORAD	Internet Explorer Partners with NORAD to Bring the Most Wonderful...
Yes	12/10/2013 01:54 AM	Windows	Windows Store gift cards are here	
Yes	12/06/2013 12:28 PM	Surface	Review: Microsoft Builds a Winner with Surf...	Dec 06, 2013
Yes	12/02/2013 03:59 PM	General	New update to REP Windows App	version 1.0.0.78 available

Add Breaking New Item



Click the **Create New Item** button above the news items.

Select the **Category** from the drop down list.

Fill in a Title, Subtitle, and the body of the message.

To include a picture, click on the **Upload Image button and browse for a file to include**

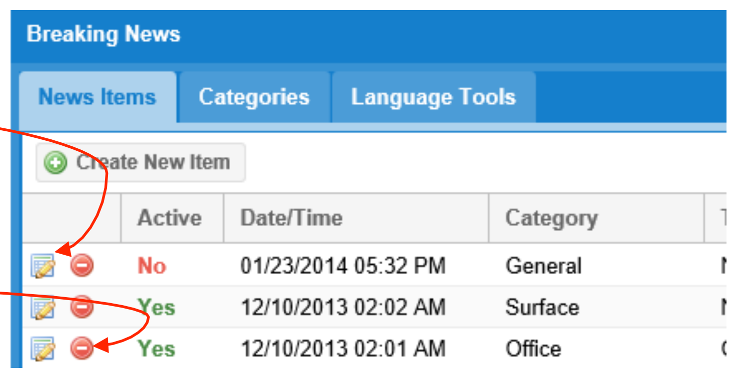
If this item should not be active yet, uncheck the **Active** field.

Click the **Save** button when complete.

Modify or Delete an News Item

To modify an existing item click on the edit icon to the left of the news item

To delete an item click on the delete icon on the left of the button and answer the confirmation prompt.



Change Log

Coming FY12H2

Track changes to the information in the REP system. Basic tracking of items include additions and deletions of users, call reports, stores, etc. Login data will be tracked as well.

Appendix

Appendix A – Administrator Setup Checklist

- Website Login & Password
  - Initial login and password change
  - Changing your account information
- Welcome Page Review
  - Modify the Welcome Page for your region
- User Management
  - Add additional administrator accounts (if necessary). Admin accounts are the same charge as reps.
  - Limit admin accounts to 5 or less
  - Read-only user accounts with view permission can be created
  - Review Field Reps users and Manager users
- Store Management
  - Review Stores and Chain hierarchy
  - Modify Chain classifications if you need to assign different types of Reps to a store
  - Review Store Assignments and Visit frequency
  - Add/Remove/Reassign stores as needed
    - Initial Roll Up file prepopulated the store assignments for the primary rep
    - For dual coverage of a store, you can now assign additional reps to those stores
- Calendar
  - Schedule store visits for each rep based on the stores assigned and the frequency of visits per month
- Call Report Management
  - **Tips:**
    - **Create your "largest" call report first (most Sections and questions)**
    - **Add logic**
    - **Localize**
    - **Use this form when creating your subsequent forms, modifying as needed.**
    - **Localization and logic will remain from this report and save you the steps of duplicating that effort in each additional call report.**

  All Global templates provide corporate guidance and can be modified to fit your region and retail specific needs. You can:

    - Hide sections that do not apply to the retail chain
    - Hide questions that do not apply
    - Add Questions for locally relevant information

  - Using the Global Store Visit Call Report
    - Global template for field labor store visits
    - Create call reports based on the needs of the chains in your region
  - Adding tasks/questions
  - Localization of call reports

- Multiple languages per call report
- Defaults to English if no translation entered

- File Uploads
  - Upload Resources used by the Reps
    - My Training = Field Rep training
    - Kiosk Maintenance = setup/ troubleshooting instructions for kiosks
    - Plan-o-grams = store display plan-o-grams
    - Demo Installation = Windows 8/8.1 installation/troubleshooting instructions
      a.
- Monthly Training Guidance
  - Modify monthly training guidance topics
  - Assign resources to training categories
    - RSP Training. Selecting the following categories will allow the resource to automatically appear in the appropriate training section in the RSP Training form on the Windows App
      a. General
      b. Hardware
      c. Office
      d. Surface
      e. Windows
      f. Xbox
- Call Reports – Escalations
  - Configure email escalations based on call report answers
- Call Reports – Scheduled
  - Configure automatic Excel reports for each type of call report
    - Can be scheduled Daily, Weekly or Monthly

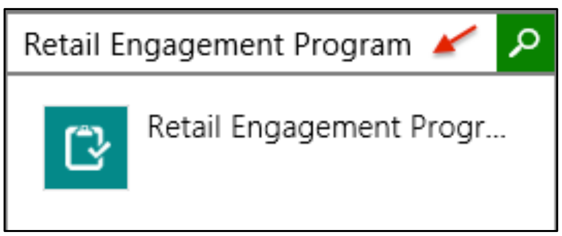
Appendix B – REP Windows 8 Client Application Installation and Setup Instructions

Please follow the below instructions for installing and setting up the REP client application on the following devices: Surface RT, Surface Pro, PCs / Laptops with Windows 8.1 (or upwards) operating system.

1. Open Windows Store app

2. Search for Retail Engagement Program app.
   Alternatively, you can directly go to the link : **http://ow.ly/xCveU** (case sensitive)

3. Select the application from the list (it will be the only one listed)



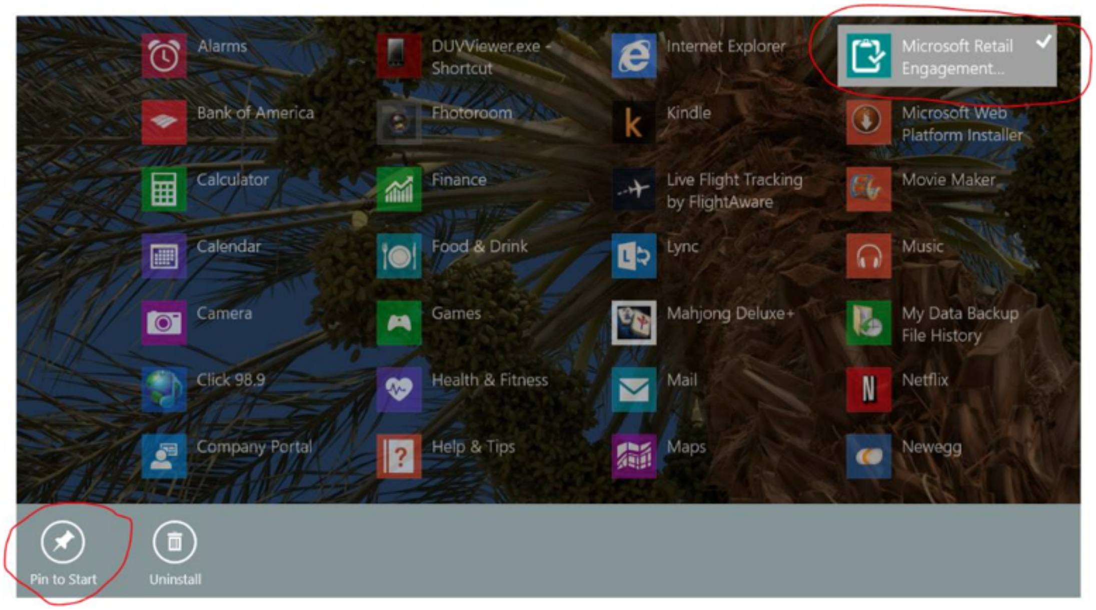
Note:
REP client application is optimized for Windows 8.1 version or upwards. If you are using version 8.0 of Windows, REP will not appear in the Windows store search results. Step wise instructions on upgrading windows can be found at this page: http://windows.microsoft.com/en-au/windows-8/update-from-windows-8-tutorial

4. Select to install

5. The installation will happen automatically and Windows will notify when the installation is complete

Starting the Program after installation:
If you are using Windows 8, the application icon will appear on the far right of your Start screen:

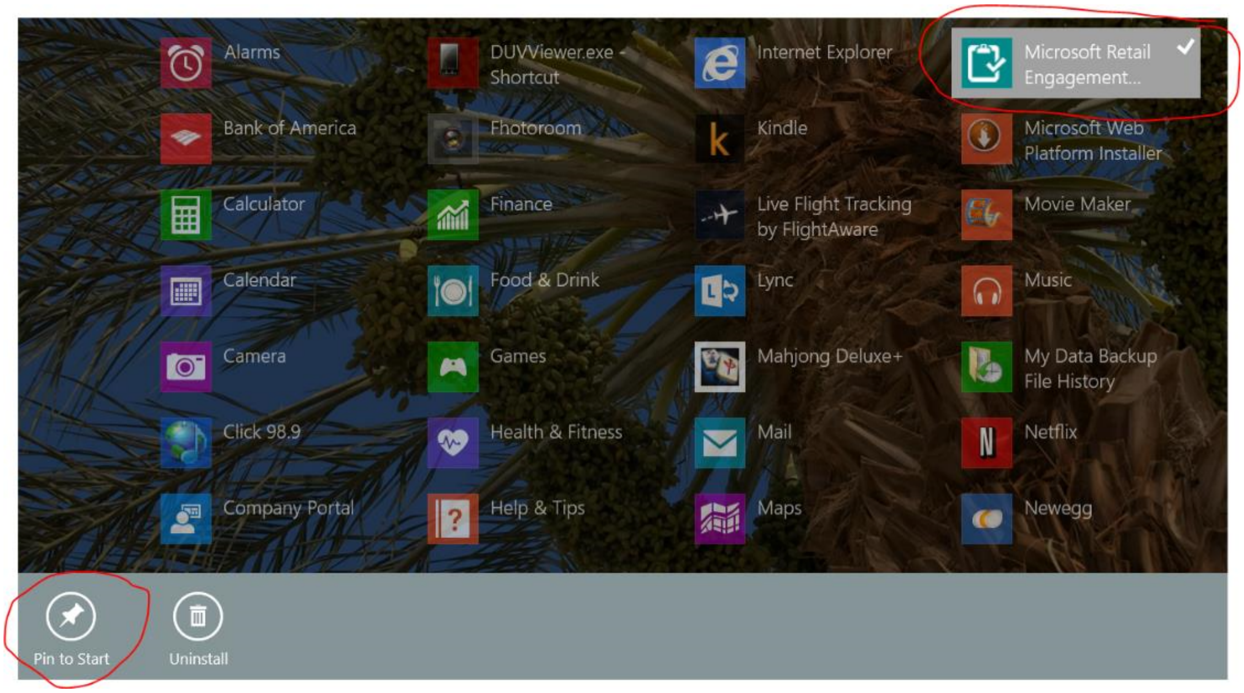
If you are using Windows 8.1, swipe up from the bottom of your Start screen, and you will see the program listed as "Microsoft Retail Engagement Program" with "New" highlighted below it. Right-click on the icon and select "Pin" to start at the bottom. The application will now appear on the far right of your Start screen.



Upon running the application for the first time, you will be asked to enter in a 10-digit ID number. You can find your ID number on the Welcome Page of *http://www.msftreps.com*. If you do not have access to this site, please ask your administrator for assistance.

Note:
Sleep function time setting of the device could affect form data transfer to the server. Especially for forms with large amount of data / photos, if the device goes to sleep mode while the form is being uploaded, that could result in a form submission failure. So, it is desirable to increase the time of in-activity before a device goes in to sleep mode. You can do that through the device power options. Please click on this link to know the steps. It must also be noted that by doing this, more battery power is spent than in power saver mode.

If you are using Windows 8.1, swipe up from the bottom of your Start screen, and you will see the program listed as "Microsoft Retail Engagement Program" with "New" highlighted below it. Right-click on the icon and select "Pin" to start at the bottom. The application will now appear on the far right of your Start screen.



Upon running the application for the first time, you will be asked to enter in a 10-digit ID number. You can find your ID number on the Welcome Page of http://www.msftreps.com. If you do not have access to this site, please ask your administrator for assistance.

Appendix C – Global KPIs tracked in REP

Category	Workstream	Measure Type	Measure Name	Measure Definition
Surface	Labor	KPI	# of stores visited per month	# of unique retail outlets visited by MS hired reps per month.
Surface	Labor	KPI	# of store visits per month	# of total actual store visits including multiple visits to the same store
Surface	Education	KPI	# of 1:many training impressions	# of RSP impressions via 1:many training events (# of "impressions" not # of unique RSPs trained) e.g. 1 RSP may attend 3x 1:M training = 3 impresssions
Surface	Education	KPI	# of 1:1 training impressions	# of RSP impressions via 1:1 training events (# of "impressions" not # of unique RSPs trained) e.g. 1 RSP may attend 3x 1:1 training = 3 impresssions
Windows	Labor	KPI	# of stores visited per month	# of unique retail outlets visited by MS hired reps per month.
Windows	Labor	KPI	# of store visits per month	# of total actual store visits including multiple visits to the same store
Windows	Education	KPI	# of 1:many training impressions	# of RSP impressions via 1:many training events (# of "impressions" not # of unique RSPs trained) e.g. 1 RSP may attend 3x 1:M training = 3 impresssions
Windows	Education	KPI	# of 1:1 training impressions	# of RSP impressions via 1:1 training events (# of "impressions" not # of unique RSPs trained) e.g. 1 RSP may attend 3x 1:1 training = 3 impresssions
Office	Labor	KPI	# of stores visited per month	# of unique retail outlets visited by MS hired reps per month.
Office	Labor	KPI	# of store visits per month	# of total actual store visits including multiple visits to the same store
Office	Education	KPI	# of 1:many training impressions	# of RSP impressions via 1:many training events (# of "impressions" not # of unique RSPs trained) e.g. 1 RSP may attend 3x 1:M training = 3 impresssions
Office	Education	KPI	# of 1:1 training impressions	# of RSP impressions via 1:1 training events (# of "impressions" not # of unique RSPs trained) e.g. 1 RSP may attend 3x 1:1 training = 3 impresssions
Xbox	Labor	KPI	# of stores visited per month	# of unique retail outlets visited by MS hired reps per month.
Xbox	Labor	KPI	# of store visits per month	# of total actual store visits including multiple visits to the same store
Xbox	Education	KPI	# of RSPs trained 1:1 MS Led	How many RSP are being trained face-to-face by Microsoft staff or Microsoft-hired field reps.

Appendix D – Field Types

Alphanumeric – this field support letters and numbers. It is used to enter names, license number, locations and other brief text entry items. Advanced options include making this a required field, supporting a default value, and more.

Numeric Only – used largely with mobile phones (Surface offers a full keyboard where this is less needed). This will default a smaller device keyboard in the numeric pad mode. Advanced features similar to Alphanumeric.

Yes or No – Common option when created forms and call reports. Questions that require a yes or no response also support a set of advanced features for formatting an defaults. Yes or No will translate automatically on the device per the language the device is set to (you may notice this missing in the language tools; it is handled automatically)

Date – phone option only. A date field can be created to default to today's date and be changed to show some future date like a follow up for example. Note, all records are date and time stamped on our server when submitted. This option is NOT needed to note when a record has been created or submitted.

Email Address – adding email addresses to this section will email a copy of the current call report to that person. It is an easy way to share a report with a store manager or someone else who might want a copy of the work you just performed.

Pre-defined List of Values – Technically a drop down box. When you create a pre-defined list of values, you are setting the user up to only select 1 item from a pick list. Advanced option include items such as selecting one of the items to be a default value, etc.

Multiple-select List of Values – were pre-defined is a single select, this is check off all that apply. Think check boxes; pick more than one. This section also comes with a variety of advance options to choose from.

Large Text Box – typically used for notes or any place in which you want the user to type longer sentences into the form/call report.

Display Message – This feature allows you to put some basic instructional text within your form or call report. Title it but then enter in your text. This is often instructions or reminders, etc. related to that part of the form.

Phone Number – more of a phone option where we are bringing up the phone key pad to enter in a 10 digit based phone number.

Bar Code – supported on the phone and potentially coming soon for the Surface, using the camera function, bar codes and other scan formats are supported.

Photo – Select the photo icon to take a picture. You may take more than one photo. If you take 3 or more, the photos you take will display left and right in a scroll box.

Signature/Drawing – Used largely for a Signature (sign using your finger on the screen), the solution captures signatures and saves them as an image.

Website/File Link Button – Within your call report/form. You can create buttons with words on them. Buttons can either link the user to a website URL or link the user to any number of supported files on the computer. This piece is highly interactive and works in the background with files you loaded in the File Manager. Files that have been uploaded display themselves in a pick list in this section. Title your button, select your file and the user will be able to click on that button on the device side in their form (PDF, JPG, WMV, DOCX, XLSX, PPTX, etc.) Files are then available in Resources on the mobile device as well accessible within each form that uses a button to link to it.