



AN-332 The Exception System In Elite Reporter

Elite Reporter includes a system whereby "performance rules" can be used to analyse and report on attendance data.

These performance rules provide the means to generate "exception reports" showing when your data does not meet the performance criteria contained within the performance rules.

Overview

There would be nothing worse than having to read and analyse all your data that all your Wands generate in order to find out if your business goals are being met.

For example, three XL Wands can generate up to 8 pages (or more) of data per day. A Radio Wand system can provide much more. It would take a long time to read and analyse this data manually.

The best solution is to provide a system whereby you are told when your goals are not met (called **exceptions**), so that you can quickly identify problem areas.

This is what Elite Reporter does - it allows you to create "business rules" then to use these to print reports showing how you have performed according to these rules.

Note that this system impacts your computers performance. We are maintaining more data in the system, checking more things, and working harder to generate information using the rules system. Consequently your PC will be worked harder and may become slower.

User Requirements - Understand The System

The Elite Reporter rules system is a powerful tool that will provide information in a simplified and timely manner that will help you manage your system.

However, it is complicated. We can't help that - we have tried very hard to make it as simple as possible and to make the program as intuitive as possible.

Before you use the system - please ensure you understand the concepts;

Concepts

1. You must create rules templates that define performance criteria,
2. You must copy these rules templates to locations so as to activate them,
3. Reports are printed which use activated rules to analyse performance.

Capabilities and Limitations & Checks

The rules system is a full featured data-base program extension to Elite Reporter. It links information together and uses data-bases of rules to analyze data to print special reports.

Each location can have as many or as few performance rules applied to it as you want. Performance rules can be deleted, added or changed as required. There is no program limit on the number of performance rules. However, you cannot apply the same rule to a location twice or have more than one rule active on the same day and time.

If you do not delete performance rules from locations and only add new rules to locations as your requirements change, you can "go back in time" to generate reports on locations according to the old performance rules.

In other words, you can report according to how you used the system at various dates because we keep a record of old performance rules and apply them according to the data you are reporting on. For example - if you report on data that is 12 months old, the rules applicable at that time are used to generate the performance rules reports.

The performance rules system allows you to have as many different performance rules as you want. You can allocate performance rules completely without restriction to locations so that you can setup your locations in any way that you want. You need this flexibility to handle the many different situations that occur in real life.

For example - many shopping centre locations will want at least three rules each - and maybe more. One rule for before trade, one rule for during trade and one rule for after

trade. Since trading hours changes by day of week, the number of rules multiplies! We handle this without problem.

Applications For The Rules System

Security

Setup the rules so that guards are required to patrol as per your contractual obligations. Produce reports showing when your guards have not met these performance requirements.

Cleaning

Some public area cleaning contracts require a level of performance. Use the rules system to show when you have not met cleaning criteria.

For example, to check the toilets 8 times a day, the carpark twice per day etc.

Counting Events

For example, you want to count the number of times a sales person performs certain tasks - say - answers the phone and the number of customer inquiries and sales. This is three events.

The sales person has;

- an XL Data Wand,
- 3 iButtons glued to a board by the cash register,
- Every time each event takes place the XL Data Wand is touched against the button used to represent that event.

Setup the performance system with very simple rules requiring minimum exact sales inquiries and exact sales and exact phone calls. Suggest 1 total hits on each event.

The exception report will show the actual of each - thereby giving a quick picture about what was going on.

Other reports will help to determine activity;

- centre visits showing exactly what was going on in sequence,

- location attendance providing a picture of one location and,
- centre attendance a picture of all locations,
- Risk management report will show you a total number of hits for all locations for the month - it is useful to get a "current snapshot" of what is going on.

Using The Rules System

There are three steps - the three central concepts to the system;

1. Create "Rules Templates" that define the business rules you want to analyze your data with,
2. Assign rules from the rules templates to locations so as to activate the performance rules,
3. Print reports using those rules that are active.

Create Rules Templates

Use the "Maintain. . .Rules Templates" menu option for this function.

Each rule in the rules templates data-base has two parts;

- information about when the rule is applicable,
- information about performance - the performance criteria that you require.

Each Rule Template (which we'll probably call a rule) has data items that must be correctly entered if you want the rule to work properly. We provide an editing function so you can fix errors.

NOTE that when you create a rule template it is not used in reporting or for anything at all. It is just sitting in a data-base ready to be assigned to a location after which it can be used. It is a template.

Repeating : a rule template is not used for analysis. Only when a rule template is assigned to a location does the rule template turn into a rule that can be activated and used for analysis.

The data items in the rules templates are;

Start Date and End Date

Each rule has a start and an end date.

The rule is only valid between these dates. Outside these dates, the rule will not be used to analyze your data. Outside these dates the report showing rules by centre and date will not show "out-dated" rules.

This is an important thing. You can use these values to give locations a number of rules "end on end". For example, handle Christmas, Good Friday and other notable dates.

Start Time and End Time

The start and end time are used to define within a day when the rule is active.

For example, between 900 and 1700 (normal business trading hours).

Outside these times, the rule is not used for analysis.

Day Of Week

Each rule can be tailored to only be applicable to certain days of the week.

This is particularly useful. For example - shopping centres have different requirements for a weekend to a week-day.

Total Hits

This is a performance requirement. You must have EXACTLY this number of hits.

Hits Per Hour

This is a performance requirement. You must have EXACTLY this number of hits.

You are required to key in the number of hits in the selected number of hours. For example, 2 hits in 6 hours.

The software will then analyze your data looking for exactly this performance - each 6 hour block will be expected to have this number of hits.

Minimum Hits

This is a performance requirement. You must have a minimum of this number of hits - and can have as many more as you want.

The benefit of this over the other options is that should be obvious - your staff may perform extra attendances for a variety of reasons and you don't want an exception saying that they exceeded the minimum.

Assigning Rules To Locations

Each location can have zero or one or many rules assigned to it.

Assigning a rule to a location actually copies the rule from the rule templates data-base into another and separate database which is then assigned to the location.

Warning : deleting a rule from the templates data-base does not delete the rule from your locations.

You can assign a rule to a location in two ways with;

- "Maintain. . .Centres" menu or,
- "Maintain. . .Locations" menu.

Note that you cannot have two rules active at a location at the same time and day, and that you cannot assign the same rule more than once to a location - these errors are detected and you will be notified of your error.

"Maintain. . .Centres"

Use the "Rules" tab in "Maintain. . .Centres" to copy a rule to ALL locations at a centre.

This is a simple "copy to all locations" facility - it gives you a FAST means to setup all the locations at a centre that has a lot of common rules.

You can copy any number of rules to all locations - the only restrictions are that you cannot have more than one rule active at the same date and time and you cannot assign the same rule twice.

"Maintain. . .Locations"

Use "Maintain. . .Locations. . .Rules" to assign rules to a single location, and to delete rules from a single location.

"In Maintain. . .Locations", the "Rules" tab allows you to assign any number of rules template items to just one location.

Generating Rules Performance Reports

There are three reports;

Performance. . .Rules

The report shows you what rules were active in the date range for the selected centre.

You must enter a date range and the centre you want to report on.

This is a very good way to determine if your rules have been setup properly - as an auditing function.

Performance. . .Exceptions

This is the report you will use most often. It shows you which locations have not met the performance targets specified by the rules applied to the locations.

In other words - the locations where you failed to meet target requirements.

Performance. . .Actuals

"Actuals" shows you a summary of each location with the actual, expected and difference between actual and expected hits for that location.

This is a good check on your rules.

This is a summary report - it shows you your data for each location.

The report will tell you if the location had an exception - though it will not tell you what the exception was since there may be more than one exception.

Things You Should Not Do

We strongly suggest that you do not delete a rule after it has been assigned to a location if you have been using the rule for reporting.

If you delete the rule, you cannot later re-report on you data with the rule. Your only performance reference will be the printed reports you have already printed - you can't print any more.

Examples Of Rules Templates

You create rules according to how locations are attended. Since each rule has only one start and ending time - there may need to be a number of rules to cater for each location.

EXAMPLE 1 - Location attended 4 times at night after trade and before midnight, 2 times after midnight and before trade and 2 times during trade - every day of the week.

Rule 1 : Start Time 0000 End Time 0859 All Days Checked. Total hits = 2

Rule 2 : Start Time 0900 End Time 1659 All days Checked. Total hits = 2

Rule 3 : Start Time 1700 End Time 2359 All days Checked. Total hits = 4

EXAMPLE 2 - Location attended every hour

Rule 1 : Start Time 0000 End Time 2359 All days Checked. Hourly Hits = 1

EXAMPLE 3 - Location attended 2 times a night Mon/Tue/Wed/Thu and 3 times Fri/Sat/Sun.

Rule 1 : Start Time 0000 end time 1159 Days Checked Mon, Tue, Wed, Thu Total hits 1

Rule 2 : Start Time 1200 end time 2359 Days Checked Mon, Tue, Wed, Thu Total hits 1

Rule 3 : Start Time 0000 end time 1159 Days Checked Fri, Sat, Sun Total hits 1

Rule 4 : Start Time 1200 end time 2359 Days Checked Fri, Sat, Sun Total hits 2

Long Term Considerations

There is nothing more sure than after 12 months, someone wanting a report on old data - 12 months ago.

We suggest that you keep your rules - never delete them - then you can always report on old data at a later date. One further "administrative suggestion" is for you to print your rules out on paper and file them away so that you can refer to them later if necessary.

If we did not provide a system whereby you could correctly print this data, you would be exposed to risk from allegations about your performance after a period of time.

Cheating The System - and getting caught!

Cheating

The only way to cheat the rules system is to setup the rules so that they require less performance than is actually required! Simple enough.

Another trick would be to "expire" the rules early by changing the "End Date" so that exception reporting is eased off.

Checking Up - Auditing The System

To determine if the rules system is being used as it should be - print the "Actuals" report.

Very simple.

This will show you each location, the actual number of hits on the location, the expected number of hits on the location and the difference. If you know what performance you truly expect a location to have then you can fairly quickly determine if you are getting what you want!