



Field QC Portal User Guide

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Introduction

The Field QC Web Portal is an externally facing web site used by USM Field QC personnel to manage field inspection forms/photos and support field activity through data search and reporting capabilities.

The site is located at <https://fieldqc.usmservices.com>.

In order to ensure operability of the Field QC Web Portal you must ensure the following:

- Your browser is IE 10 or higher. IE 11 is recommended. To confirm, go to Help → About in Internet Explorer and review your version information
- You have pop-ups enabled (Tools → Internet Options → Privacy → Uncheck Pop up blocker).
- The web site is listed as a trusted site (Tools → Internet Options → Security → Trusted Sites → Sites → Ensure fieldqc.usmservices.com is listed).
- Appropriate system access (see Security/Login section)

Security/Login

Overview



Field QC Web Portal Login

Please enter your login information...

Username:

Password:

Login

[Forgot your password? Click Here](#)

In order to login to the USM Field QC portal you must have a National Accounts Login ID with access granted to the Field QC portal. There are two levels of portal access:

- Basic access – this grants the user access to:
 - Create inspections
 - Edit their own inspections
 - Run reports
- Administrative access – this grants the user access to:

- Create inspections
- Edit their own inspections
- Edit other users' inspections
- Run reports

To request access, submit a request to the TrackIT help desk system with VP approval; one of two ways:

- With an active USM VPN connection from a company laptop or PC – open a browser window and type “helpdesk”
- Send an email request to helpdesk@usmservices.com

Self-Service Password Reset

For all National Accounts System-based applications (including the Field QC Web Portal) you are required to establish two security questions in order to verify your identity for self-service password reset functionality. You will not have the ability to log into the Field QC Web Portal until your security questions have been established. Once security questions are established you can reset a forgotten password by clicking the “Forgot password?” link on the login page which will prompt you with the questions you established.

Initial Setup

The following shows the USM Application Password Reset page for establishing Security Questions. Choose two questions from the dropdown lists provided and supply corresponding answers.

Note: You must choose two DIFFERENT questions. Your answers will be case sensitive. Choose questions and answers that are easy for you to remember but difficult for someone else to guess.

USM Application Password Reset Service

Security Question 1
Question
[Redacted]
Answer
[Redacted]


Security Question 2
Question
[Redacted]
Answer
[Redacted]

Hide Answer Text

Submit Answers

[?]

Message from webpage

 You are required to establish two security questions. These questions and the answers you provide will validate your identity in the event you need to reset your password.

Choose two questions with responses that are easy for you to remember but difficult for another person to guess. Answers must be at least 4 characters in length, ideally a phrase or sentence and are case sensitive.

OK

To view your typed answers in plain text, uncheck the “Hide Answer Text” check box. To view USM’s password policy on the SOP, click the “?” button. Once you have supplied your security questions and answers, click the “Submit Answers” button.

USM Application Password Reset Service

Security Question 1
Question
What is the name of your favorite cousin ?
Answer
●●●●●

Security Question 2
Question
Who is your childhood hero ?
Answer
●●●●●●●

Hide Answer Text

Submit Answers

[?]

You will see a message that your questions and answers have been saved. You can return to the Field QC login page and resume the login process.

You have successfully saved your Security Questions and Answers.
You may now close the browser.

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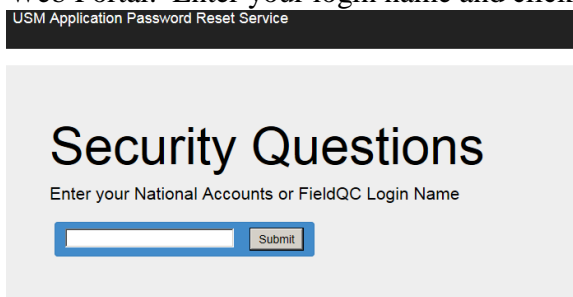
Retrieving a Forgotten Password

On the login page of the Field QC Web Portal you will see a link for “Forgot your password? Click Here”



In the event you forget your password or disable your account due to reaching the maximum login attempts, click the link. You will be redirected to the USM Application Password Reset service.

You will be prompted to enter your login name. This is the same user name you use to login to the Field QC Web Portal. Enter your login name and click “Submit”.



The security questions you previously established will be displayed. You must answer both questions correctly in order to reset your password. REMEMBER that answers are CASE SENSITIVE.

USM Application Password Reset Service

Security Question 1
Question
What is the name of your favorite cousin ?
Answer

Security Question 2
Question
The country you always dreamt of vacationing in ?
Answer

Hide Answer Text

Submit Answers

?

Once you have provided your answers click “Submit Answers”. If you have answered the questions successfully you will be presented with a page to type a new password. Your password must comply with USM’s password complexity requirements. Passwords must include at least 3 of the 4 items below and be a minimum of 8 characters in length:

- Upper Case (ex/ A, B, C)
- Lower Case (ex/ a, b, c)
- Numerals (ex/ 1, 2, 3)
- Non-alphanumeric (ex/ @, #, \$, %)

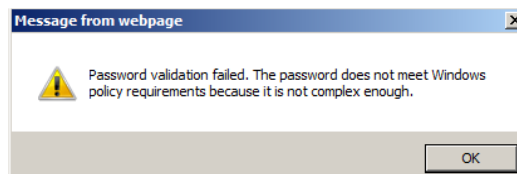
USM Application Password Reset Service

Password:

?

Submit

If your password does not meet the complexity requirements you will receive the following message:



Once you have supplied a password which meets the complexity requirements you will receive a message confirming the password reset. You can return to the Field QC login page and resume the login process.

USM Application Password Reset Service

You have successfully reset your password.

You may now open your application and log in using the new password that you just entered.

Password Requirements

Passwords for the Field QC Web portal will expire every 90 days and must meet USM's password complexity requirements.

Login Profile

On the left hand side of the home page above the navigation menu you will see your currently logged in user ID and the password expiration date. When passwords are within 15 days of expiring, the expiration date will be displayed in **bold red**.



Lock-Out

Attempting to login unsuccessfully 3 times in a row will lock/disable your user account. For each failed login attempt you will see the following error message.

The screenshot shows the 'Field QC Web Portal Login' page. At the top, it says 'Field QC Web Portal Login'. Below that is a dark grey bar with the text 'Please enter your login information...'. Underneath is a form with two input fields: 'Username:' containing 'lmatteo' and 'Password:'. There is a 'Login' button below the fields. A blue link reads 'Forgot your password? Click Here'. At the bottom, a red error message states: 'An error occurred trying to log into the application. Please verify your user ID and password. Too many failed login attempts will result in your account being disabled.'

Once you reach 3 unsuccessful attempts, your account will be disabled. You can click on the “Forgot your password? Click Here” link on the login page to verify your identity through your established Security Questions and reset your password. In the event you forget both your password and your Security Questions, you can submit a ticket to the TrackIT help desk.

The screenshot shows the 'Field QC Web Portal Login' page. At the top, it says 'Field QC Web Portal Login'. Below that is a dark grey bar with the text 'Please enter your login information...'. Underneath is a form with two input fields: 'Username:' containing 'lmatteo' and 'Password:'. There is a 'Login' button below the fields. A blue link reads 'Forgot your password? Click Here'. At the bottom, a red message states: 'Your account has been disabled. Please open a trackit to enable your login.'

Expiration

Each time you reset your password, you reset the expiration days to 90 days from the reset date. In the event you do not reset your password prior to password expiring, you will be forced to reset your password the next time you log into the Field QC portal. You may not log into the portal until your expired password is reset.

Change Password

You have requested to change your password. Please fill out the information below.

Please choose a password that is easy to remember but complex enough to remain secure. The password must:

- Be a minimum of eight characters long.
- Contain characters from at least 3 of the following 4 classes:
 - Upper case letters such as A, B, C
 - Lower case letters such as a, b, c
 - Numerals such as 0, 1, 2
 - Non-alphanumeric (special) characters such as @, #, \$, %

Note that passwords are case-sensitive, so if you use a mix of upper-case and lower-case characters they must always be entered this way.

Additionally, the password you entered cannot have been used in the last thirteen password changes and all passwords will expire in 90 days.


Username: **lmatteo**

Password:

New Password:

Confirm New Password:

Home Page and Navigation Menu

1. On login, you will see the home page with a welcome message. You will also see the main menu on the left hand side.
2. All users have access to the navigation items listed below. Click on the double arrow  to expand or collapse each sub-menu. The diagram below outlines the options/features available in the menu.



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- **Inspections** – Create, search, edit inspection forms
 - **New** – This option allows the user to create a new blank inspection form. The functionality is identical to the functionality available on the Mobile Field QC application with the following additional capabilities:
 - Add photos
 - Associate the inspection to a work order
 - Associate the inspection to an asset

- Create an asset from the inspection form
 - **Open** – This option allows the user to search for existing inspections and make edits to existing inspection forms.
- **Search** – Search National Accounts System Site, Resource and/or Work Order detail
 - **Sites** – Launch point for National Accounts System data searches. Drill into Site information to view Resource Assignments, Resource Detail, Work Order Detail, Inspection History, Site Plans, etc.
- **Reporting** – Submit report requests and retrieve reporting output
 - **Visit Compliance** – Evaluate # of completed visits against the visit requirements defined in the National Accounts System.
 - **Inspection Data** - Extract data from submitted inspection forms
 - **Inspection Submission** – Extract basic inspection header information to report on visit volume
 - **Scheduler Service Detail** – Report on work scheduled in the National Accounts System.
 - **Retrieve Reports** – Retrieve data in Excel format from completed Visit Compliance and Inspection Data reports
- **Training**
 - **User Guide** – Launch user guide document
 - **Glossary** – Definition of work order statuses
- **Security**
 - **Change Password** – Change your login password
 - **Security Questions** – Change your security questions
 - **Log Out** – Log out of the Field QC Web Portal. Note, you will be automatically logged out of the Field QC Web Portal after a period of inactivity.
 - **Privacy Policy** – Review the USM Privacy Policy

Inspections

The inspections menu provides the end user a method to create new inspections or edit existing inspections. Inspection data is available for edit regardless of whether the original inspection form was created through the web portal or through the Windows mobile Field QC application. Users with normal access privileges have the ability to edit their own inspection forms only.

New

The *New* option under the Inspections main menu allows the user to create a new inspection form through the web portal.

Create a New Form

The screenshot shows a web form titled "Create New Inspection Form". Below the title is a subtitle: "Enter/Select the new Inspection form parameters below. * = required information". The form contains several fields:

- * Date: A text input field containing "5/3/2010" with a calendar icon to its right.
- * Inspection Type: A dropdown menu.
- * National Account: A dropdown menu with the text "Select National Account".
- * Site #: A blue hyperlink labeled "Select Site".
- Attending Service: A checkbox that is currently unchecked.
- * Description: A text input field.

At the bottom center of the form is a grey button labeled "Create Form".

Users are required to supply some initial data in order to create an inspection form. This set of data is common among all types of inspection forms. Data points with a red asterisk (*) are required fields. The data points are as follows:

- **Date** – this date represents the date of the actual inspection. The “create date” is logged separately as a timestamp when the “Create Form” button is clicked.
- **Inspection Type** – represents the type of inspection
 - Janitorial
 - Janitorial Workplace (Safety) Inspection
 - Land-Lot
 - Snow Event
 - Electrical-Lighting
 - Retrofit
 - Asset
 - Exterior Assessment
- **National Account** – represents the customer for which the inspection is being performed
- **Site #** - clicking on the “Select Site” link will provide the user with a dropdown list of locations related to the National Account selected. If no account is selected, no sites will be displayed in the dropdown list.
- **Attending Service** – represents whether the inspection was performed while the vendor/crew was performing service.

- **Description** – brief description of purpose of inspection (i.e. problems with service, routine inspection, on client request, etc.)

Once the user has supplied the initial information, clicking “Create Form” will log a record of the inspection to the National Accounts database with a status of “In Progress”. From this point forward, the user can refer back to this record of inspection.

Open

The *Open* option under the Inspections main menu allows the user to search and edit existing inspection forms. Users with basic access can search all forms submitted by any user but may only edit the forms they created. Users with administrative access can edit any inspection form regardless of the user who created.

Inspection Report Search

Users are provided a variety of different search parameters to retrieve existing inspection reports.

Inspection Report Search

Enter your search criteria below.

National Acct.:	<input type="text"/>	
Site #:	<input type="text"/>	Attending Service: <input type="text" value="All"/>
Start Date:	<input type="text"/>	End Date: <input type="text"/>
Work Order:	<input type="text"/>	Status: <input type="text" value="In Progress"/>
Region:	<input type="text"/>	User: <input type="text" value="akanjanakorn"/>
Insp. Type:	<input type="text"/>	
<input type="button" value="Search"/>		

The available parameters for searching inspection forms are as follows:

- **National Acct** – represents the customer account associated with the inspection form. The default is blank (all accounts).
- **Site #** - free text entry. Represents the store location associated with the inspection form. The default is blank (all sites).
- **Attending Service** – represents whether the inspection form was created in attendance of service being performed. The default is All.
- **Start Date** – Starting inspection date range. Default is blank. The user can provide a start date, an end date, both, or neither.
- **End Date** – Ending inspection date range. Default is blank.
- **Work Order** – free text entry. Allows the user to search for inspection form(s) associated with a specific NAS work order #.
- **Status** – Status of inspection forms. The default is “In Progress”. Note – inspection forms can be edited indefinitely; this is by design per the Field QC team.
 - **In Progress** – Inspection form created. All required data not supplied.
 - **Complete - No Photos** – Inspection form completed. No photos attached.
 - **Complete** – Inspection form completed. Photos attached.
 - **All** – All statuses
- **Region** – dropdown list of USM regions. USM regions can be created in the National Accounts System by users with access to the USM region maintenance area. When selected, the inspection report search will pull all inspection forms created for store

locations within the states associated with the selected USM region. Default is blank (all regions).

- **User** – User who created inspection form. Free text entry. Represents NAS login ID.
- **Inspection Type** – represents the type of inspection form

Once the user has supplied the parameters for their search, clicking the “Search” button will retrieve the related inspection forms from the database.

Nat. Acct.	Site #	Site City	Site State	Date	Insp. Type	Created By	Last Update By	Last Update On	
Bank of America Landscaping	08146	Spruce Pine	NC	7/10/2014	Land-Lot	roof	roof	7/10/2014 6:18:25 PM	View
Giant Eagle, Inc.	6377	Painesville	OH	7/10/2014	Janitorial	bvazquez	bvazquez	7/10/2014 11:19:37 AM	View
Giant Eagle, Inc.	6378	North Canton	OH	7/10/2014	Janitorial	mwagner	mwagner	7/10/2014 1:46:50 PM	View
Ross Stores Janitorial	0594	Philadelphia	PA	7/10/2014	Ross Janitorial	jgreenberg	jgreenberg	7/10/2014 2:37:16 PM	View
Walgreens	07472	Bluffton	IN	7/10/2014	Land-Lot	rpratt	rpratt	7/10/2014 1:19:28 PM	View

Search results include the National Account associated with the inspection, the site # associated with the inspection, the date of inspection, the inspection type, the user who created the inspection and three options – View, Edit and Delete. Note: Edit and Delete are only available to the user who created the original inspection form and/or administrative users.

The Site # link allows you to navigate to the Site Detail page to review site information such as work order history, assigned resources, contact information, etc.

- **View** – Opens the inspection form in read-only format. The user then has the option to print.

Inspection Report

Description: land
 Site: [08146 - Spruce Pine, NC](#)
 National Account: Bank of America Landscaping
 Created By: roof
 Last Update By: roof 7/10/2014 6:18 PM

Insp. Type: Land-Lot
 Date: 7/10/2014
 Attending Service: No
 Make Available Externally:

[Return to Inspection Search Results](#)

[Print](#)

Lawn Maintenance

In scope or out of scope call out? In

Grass properly mowed and at consistent height, clippings removed/cleaned: **Meets**

All walks and curbs are cleanly edged **NA**

All plant, tree and flower beds are cleanly edged **Somewhat Below**

Lawn is green/full: minimal brown/bare spots, weeds, etc **Greatly Below**

Comments **excessive weeds in lawn**

The Site # link allows you to navigate to the Site Detail page to review site information such as work order history, assigned resources, contact information, etc.

- **Edit** – Opens the inspection form in edit mode. The user then has the option to update the inspection ratings, comments, etc., print the inspection form, associate a work order to the inspection form, associate an asset to the inspection form (note – only available for asset inspections), make the inspection form available externally, and/or attach photos to the inspection form.

Inspection Report

Description: test ross
Site: 000099 - Las Vegas, NV
National Account: Ross Dress Land

Insp. Type: Janitorial
Date: 4/1/2010
Attending Service: No
Make Available Externally:

[Work Orders](#) [Photos](#) [Save](#) [Print](#)

Entrances

Entrances: Glass: Mats:
Windows: Comments:

Sales Floor

Floor Type 1: Condition: Corners:

- **Delete** – Deletes the inspection form from the database.

Inspection Form Options

While editing a field inspection form, the user has the option to update the inspection ratings, comments, etc., print the inspection form, associate a work order to the inspection form, associate an asset to the inspection form (note – only available for asset inspections), make the inspection form available externally, and/or attach photos to the inspection form.

Save

While editing the contents of the inspection form the user can click the “Save” button at any time. The “Save” button will validate the data supplied against required fields. If required fields have not been populated the system will return to the user a list of validation errors that must be corrected in order to complete the form.

Inspection Report Save Print

Description: asset testing Insp. Type: Asset
Site: 002914 - Waynesburg, PA Date: 3/30/2010
National Account: McDonalds HVAC Attending Service: No
Make Available Externally:

Assets Work Orders Photos

Identification

Asset Type Name: Owned By: Description:

General

If the inspection form was originally created from a handheld device, it is possible that the site location # entered offline is not a valid site number. If this is the case, the invalid site number will display on the portal in bold red font as “Not Found”. A link is available to select a valid site. Until a valid site is identified, the inspection report will remain in “In Progress” status.

Inspection Report

Description: Asset testing
Site: **0756Y - Not Found** [Select Site](#)
National Account: Origins

Print

Clicking the “Print” button presents the inspection data in a ready only format ready for printing to PDF (to email, fax, etc.) or to a network printer.



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An EMCOR Company

Inspection Report

Description: **Landscape Inspection** Inspection Type: **Land-Lot**
National Account: **Target LAND 2010** Date: **3/16/2011**
Site: **T1027 Camarillo, CA** Attending Service: **No**
Created By: **jrodriguez**

Lawn

Grass green per season: **N/A**
Lawn free of trash, debris, weeds: **N/A**
Turf mowed and edged: **N/A**
Retention pond properly maintained: **N/A**
Excessive weeds in turf: **N/A**
Comments: **N/A**

Irrigation

Irrigation system on site: **Yes**
Irrigation system functional: **Yes**
Broken sprinkler heads: **Yes**
Wash-outs or ruddling indicating broken lines: **Yes**

The formatted inspection report will also include information such as associated work order numbers and photos attached to the report displayed in original size.

Work Order Number	Date
7945445	3/11/2010 9:54:00 PM
7935448	3/9/2010 9:26:00 PM



j0441502.png

Work Orders

Clicking the “Work Orders” button allows the user to search for work orders in the National Accounts system and create an association between the inspection form and one or more work orders.

The Site # will populate by default with the site number supplied in the inspection form. Users are required to supply a start date and end date to search work orders. Work Order Code is an optional free text field used to identify the Work Order Code associated with the desired work order.

Associated Work Orders - Windows Internet Explorer

File Edit View Favorites Tools Help

Associated Work Orders

Enter your search criteria below. * = required information

* Start Date: 2/1/2010 * End Date: 5/31/2010

* Site #: 5315 Work Order Code:

Search Close

Select	Work Order #	Work Order Date
Select <input type="checkbox"/>	7945445	3/11/2010 9:54:00 PM
Select <input type="checkbox"/>	7935448	3/9/2010 9:26:00 PM
Select <input type="checkbox"/>	7926416	3/7/2010 9:13:00 AM
Select <input type="checkbox"/>	7919489	3/4/2010 9:39:00 PM
Select <input type="checkbox"/>	7904890	3/2/2010 9:36:00 PM
Select <input type="checkbox"/>	7879947	3/1/2010 2:02:00 AM
Select <input type="checkbox"/>	7853439	2/26/2010 1:51:00 AM
Select <input type="checkbox"/>	7823837	2/23/2010 9:12:00 PM
Select <input type="checkbox"/>	7809801	2/22/2010 3:13:00 AM

Once search criteria has been supplied for all required fields, the user can click “Search”. The system will then retrieve all work orders in the National Accounts system matching the search parameters provided.

Next to each work order in the search results is an option to select the work order. Clicking the “Select” button next to each work order will create an association between the work orders selected and the inspection form. The ability to report on this association is provided through the reporting options on the portal.

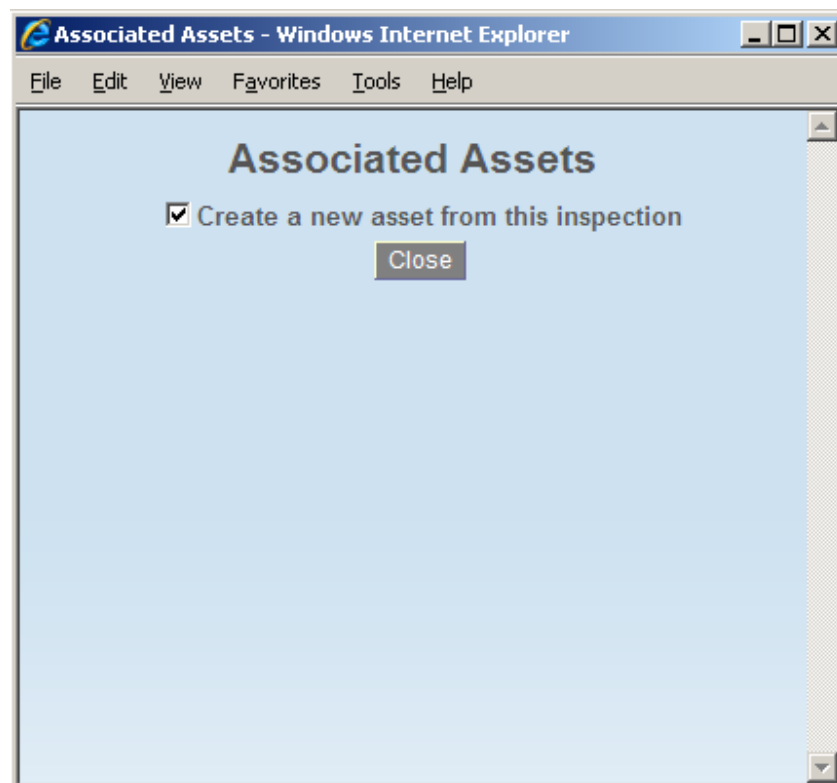
Select	Work Order #	Work Order Date
Unselect <input checked="" type="checkbox"/>	7945445	3/11/2010 9:54:00 PM
Unselect <input checked="" type="checkbox"/>	7935448	3/9/2010 9:26:00 PM
Select <input type="checkbox"/>	7926416	3/7/2010 9:13:00 AM

Next to associated work orders is the option to “Unselect”. Clicking “Unselect” will remove the association.

Assets

The “Assets” button is only available on asset inspection forms. When clicked, the “Assets” button launches a pop-up window allowing the user to perform one of two actions:

- Associate the inspection form to an existing asset. The system will search the database for assets already associated with a site location. If existing asset(s) are found, these assets will be presented to the user as available to associate. Once associated, the inspection form will update the asset condition rating of the selected asset with the rating from the inspection form.
- Create a new asset from this inspection. The system will create an asset in the National Accounts System associated with the site # supplied on the inspection form using the data supplied in the inspection form.



Photos

Clicking on the Photos option from the Inspection form will launch a pop-up window which allows the user to associate one or more photos to the inspection form. 2MB is the size limit for an individual photo. 10MB is the size limit for the aggregate of photos associated with the inspection form.

To add photos to the inspection form:

1. Click the Photos button on the Field Inspection form while in Add or Edit mode

Inspection Report

Description: test

Site: 4060 - North Canton, OH [Select Site](#)

National Account: Giant Eagle, Inc.

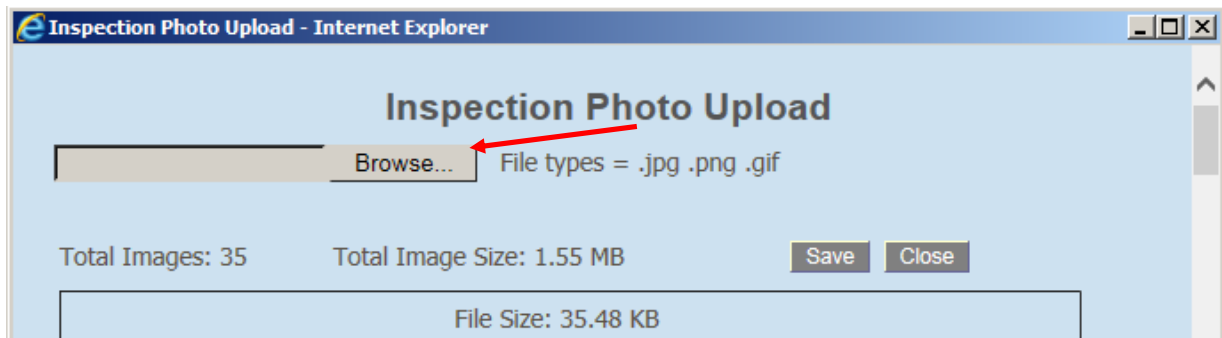
Created By: bfronk

Last Update By: bfronk 3/3/2014 1:43 PM

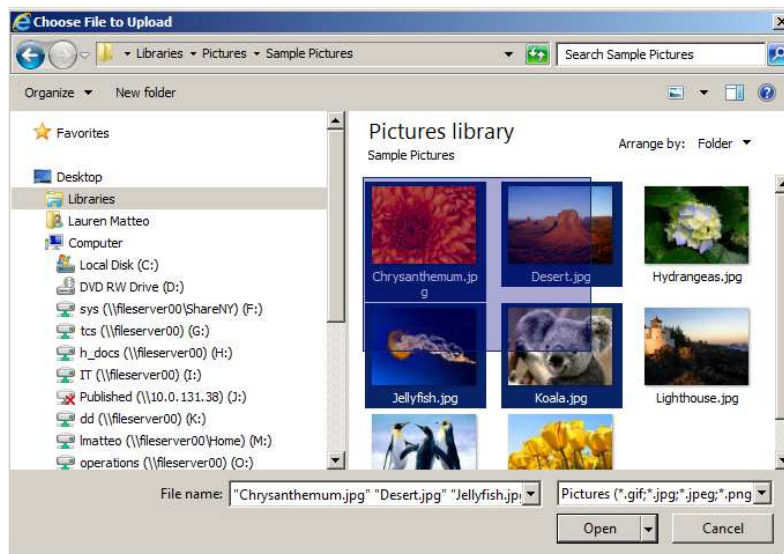
[Work Orders](#)

[Photos](#)

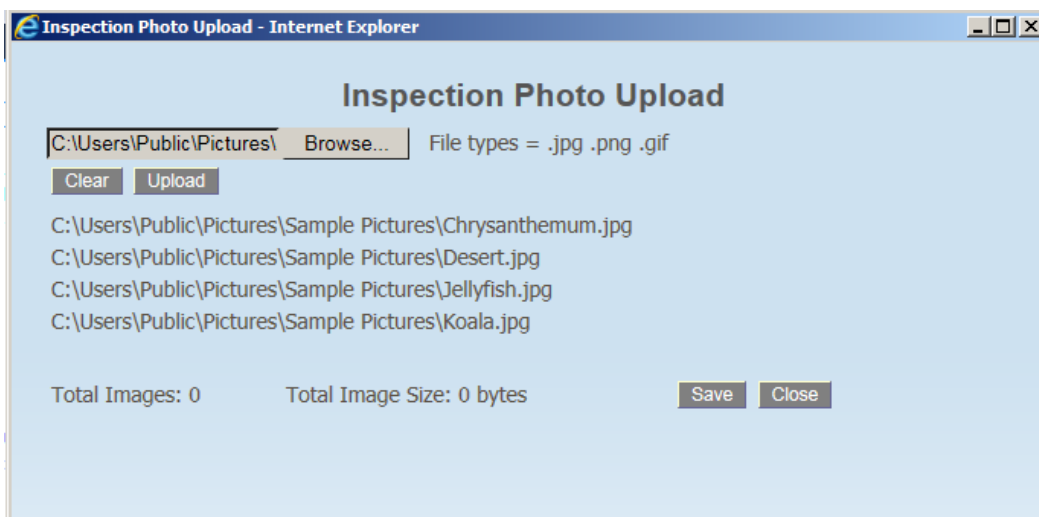
2. Click the Browse button to choose photos for upload.



3. When the “Choose File to Upload” dialogue box opens, navigate to the appropriate directory where your photos are stored. Select the photo(s) to associate with the inspection form. To select multiple files, do one of the following and click Open. ONLY select files of the appropriate file types (.jpg, png, .gif). :
 - a. Hold down your “Shift” key and highlight your files for selection
 - b. With your mouse pointer, click on an area in between the files and while holding down the mouse button, drag a selection area over the files to select.
 - c. Click inside the target folder and press Ctrl + A to select all files in the folder.

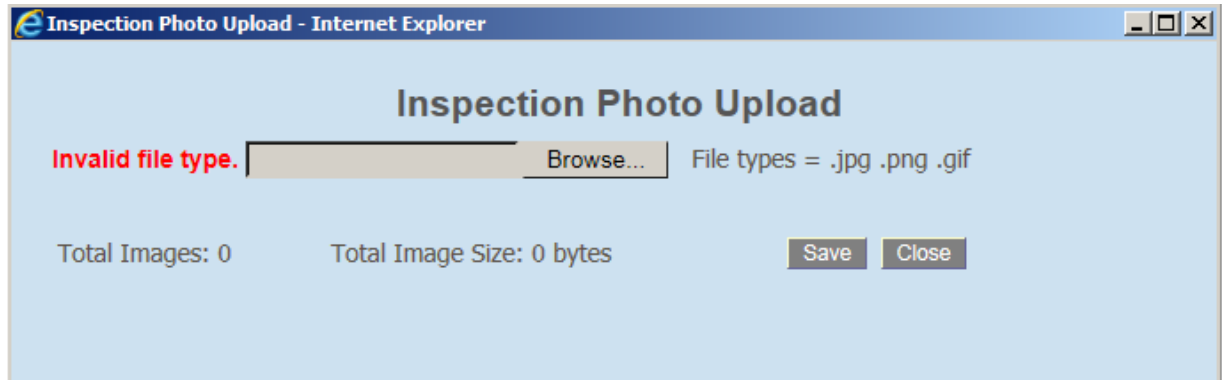


4. Once you click “Open”, the list of the files selected will appear below the file upload control. You will also see a button to “Clear” the selected list and a button to “Upload” the selected list.

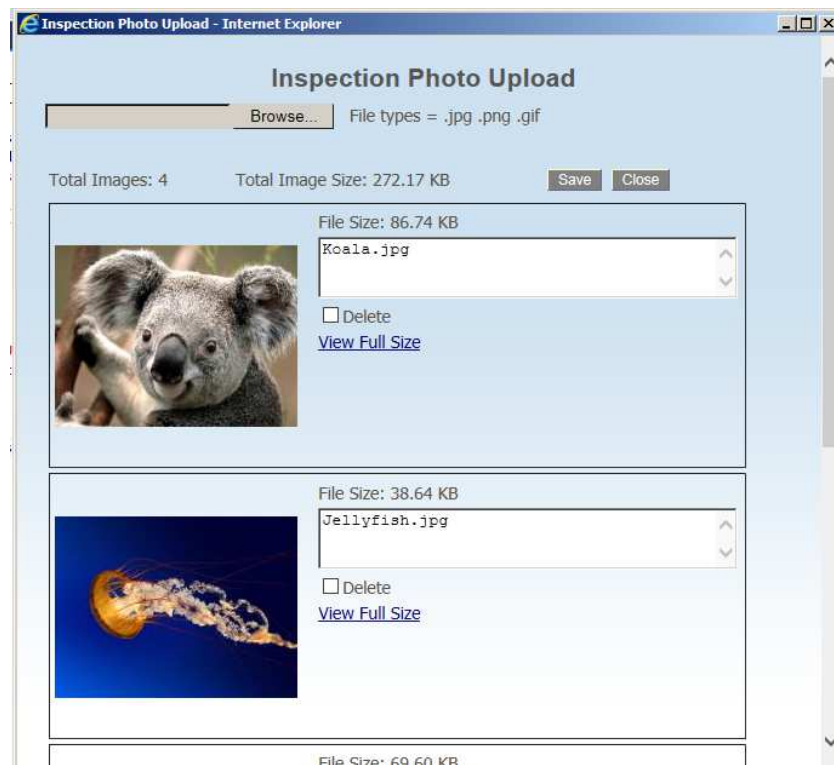


5. Clicking “Upload” will validate your selected files against the allowed file types and attach them to the inspection form.

- a. If you attempt to upload a file of a type other than .jpg, .gif, .png you will receive an error message as shown below.



- b. On successful upload you will see your selected images loaded to the thumbnails grid. You will have the option to change the file names or remove uploaded files as necessary.



Make Available Externally

An option is available on the Inspection report header in edit mode to make the inspection form available externally. When checked, "Make Available Externally" will display the inspection report on the client portal under the related site location. Inspection forms without this option selected will not be displayed on the client portal.

Inspection Report

[Save](#) [Print](#)

Description: test retrofit

Insp. Type: Retrofit

Site: 5315 - Las Vegas, NV

Date: 3/24/2010

National Account: US Bank

Attending Service: No

Make Available Externally:

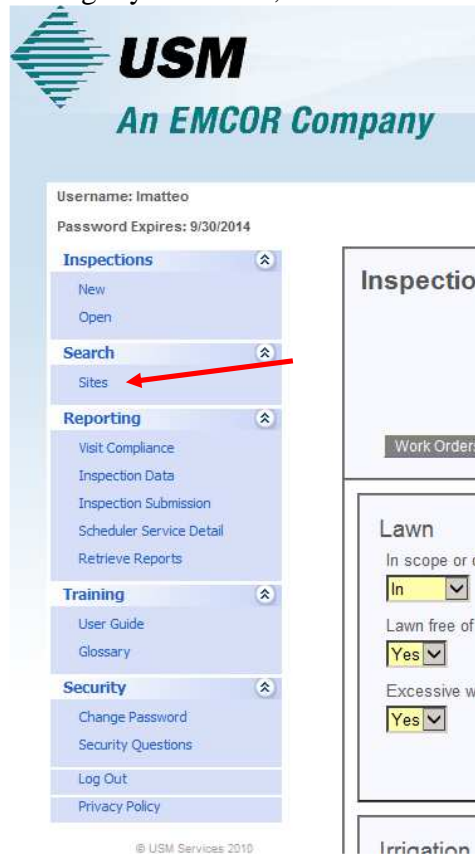
[Work Orders](#)

[Photos](#)

Search Capability

The menu of available Field QC Portal options has been expanded to include the capability to search and view a broad spectrum of National Accounts System data including store, resource, work order and assignment detail.

To begin your search, locate the “Sites” sub-menu under the new “Search” main menu.



On the Search Sites page, choose an account from the list. All other search criteria is optional. Click “Submit”.

Search - Sites
Please enter your search criteria below (* = required information)

* National Acct.:

Site #: Ends With Anywhere in Site #

Site Name:

City:

State:

Zip:

The Site Search Results will display a list of Sites matching the Site Search criteria. From here, you can choose to:

- Drill into the site information by clicking the Site # associated with the desired Site location
- Export the list to Excel

- Sort the grid (for example, by Last Inspection Date)

Site Search Results

The following 61 sites were found matching your search criteria.

Criteria	
Site # : 16	Site # Filter: Anywhere in Site #

[Export Results to an Excel document](#)

Site #	Store Name	Address 1	City	State	Zip	Last Inspection Dt
00163	Walgreens-PP	4000 W 59Th	Chicago	IL	60629	10/23/2013
01162	Walgreens-PP	8300 Northern Lights Dr	Lincoln	NE	68501	11/20/2013
01164	Walgreens	1203 W Fond Du Lac Street	Ripon	WI	54971	11/07/2013
01610	Walgreens-PP	21211 Harper Ave	Saint Clair Shores	MI	48080	11/12/2013
01652	Walgreens	3109 S Kinnickinnic	Milwaukee	WI	53201	11/02/2013
01670	Walgreens	15 Grant Square	Hinsdale	IL	60521	05/31/2013
02166	Walgreens	3524 N. University	Peoria	IL	61601	04/04/2013
02316	Walgreens	2024 85Th Avenue - North	Brooklyn Park	MN	55445	01/19/2014
03616	Walgreens	8488 W Brown Deer Rd	Milwaukee	WI	53201	11/04/2013
03716	Walgreens-PP24	2516 2Nd Ave	Kearney	NE	68845	11/22/2013
04162	Walgreens	835 Van Houten Ave	Cifton	NJ	07013	02/10/2014
05164	Walgreens-PP	9610 N Allisonville Rd	Indianapolis	IN	46201	11/06/2013
05167	Walgreens	416 S. Euclid Ave.	Bay City	MI	48706	10/29/2013
05168	Walgreens/CBRE	23007 Telegraph Rd.	Brownstown	MI	48134	
05169	Walgreens-PP	1700 West Road	Trenton	MI	48183	11/14/2013

Drilling into the site information will open the Site Detail page. Each section of the Site Detail page provides information from National Accounts relevant to that site. This page also represents the launching point from which the user can access the Resource Detail and/or Work Order Detail pages to learn more about an assigned resource or recent work order.

Site Detail

View the site detail below

Site Info

National Account: Walgreens	Contact:
Site #: 00163	Phone: (773) 581-2345
Site Name: Walgreens-PP	Fax:
Address 1: 4000 W 59Th	User:
Address 2:	Svc Line: Snow
Address 3:	Info:
City: Chicago	
State: IL	
Zip: 60629	
Start Date: 09/19/2013	

Managers

Manager	Name	Phone	Ext.	Fax	Email
Store		(773) 581-2345			
District					
Facilities	Kim Scott-Eskridge	(847) 315-4314			Kimberly.Scott-Eskridge@walgreens.com

Assignments

[Active](#) [Previous 12 Months](#)

[Export Results to an Excel document](#)

WO Desc	Resource Name	Acct	City	State	Start Date	End Date
Per Push - Full Service Lot	Jeffrey A. Redman (dba)	Walgreens	Chicago	IL	02/04/2014	
Per Push - Full Service Lot, Sidewalks & De-cing	Jeffrey A. Redman (dba)	Walgreens	Chicago	IL	02/04/2014	

Site Detail

The table below provides a description of each section of information visible on the Site Detail page.

SECTION	DESCRIPTION
---------	-------------

Site Detail
View the site detail below

Site Info

National Account: Walgreens	Contact:
Site #: 00163	Phone: (773) 581-2345
Site Name: Walgreens-PP	Fax:
Address 1: 4000 W 59Th	User:
Address 2:	Svc Line: Snow
Address 3:	Info:
City: Chicago	
State: IL	
Zip: 60629	
Start Date: 09/19/2013	

Provides basic site information such as account, address, and basic contact information. The "Svc Line" field will also provide more information on the lines of service applicable to the site.

Managers

Manager	Name	Phone	Ext.	Fax	Email
Store		(773) 581-2345			
District					
Facilities	Kim Scott-Eskridge	(847) 315-4314			Kimberly.Scott-Eskridge@walgreens.com

The Store, District and Facilities Manager contact information in the National Accounts System applicable to the site.

Assignments

[Active](#) [Previous 12 Months](#)

[Export Results to an Excel document](#)

WO Dsc	Resource Name	Acct	City	State	Start Date	End Date
Per Push - Full Service Lot	Jeffrey A. Redman (dba)	Walgreens	Chicago	IL	02/04/2014	
Per Push - Full Service Lot, Sidewalks & De-icing	Jeffrey A. Redman (dba)	Walgreens	Chicago	IL	02/04/2014	
Per Push - Full Service Sidewalks	Jeffrey A. Redman (dba)	Walgreens	Chicago	IL	02/04/2014	
Per Push - Snow Only Lot	Jeffrey A. Redman (dba)	Walgreens	Chicago	IL	02/04/2014	
Per Push - Snow Only Lot & Sidewalks	Jeffrey A. Redman (dba)	Walgreens	Chicago	IL	02/04/2014	
Per Push - Snow Only Sidewalks	Jeffrey A. Redman (dba)	Walgreens	Chicago	IL	02/04/2014	
Salt/De-icing Lot	Jeffrey A. Redman (dba)	Walgreens	Chicago	IL	02/04/2014	
Salt/De-icing Lot & Sidewalks	Jeffrey A. Redman (dba)	Walgreens	Chicago	IL	02/04/2014	
Salt/De-icing Sidewalks	Jeffrey A. Redman (dba)	Walgreens	Chicago	IL	02/04/2014	

By default, all currently active service assignments for the location. To view the Resource Detail, click on the Resource Name hyperlink. The grid can be sorted and/or exported to Excel. When more than 10 assignments are available users can page through the results. Click on "Previous 12 Months" to view all active AND inactive assignments for the location during the last 12 months.

Site Plans

Asset Info

Type	Category	Sub Category	Manufacturer	Serial #	Catalog #
DOOR ENTRANCE 1	Automatic Door	Automatic Doors	BESAM	ND	400000091575
DOOR ENTRANCE 2	Automatic Door	Automatic Doors	BESAM	ND	400000091574
DOOR EXIT 1	Automatic Door	Automatic Doors	BESAM	ND	400000091573
DOOR EXIT 2	Automatic Door	Automatic Doors	BESAM	ND	400000091572
DOOR RECEIVING PERSONNEL	Automatic Door	Automatic Doors	ND	ND	400000091814
BALER	Balers / Compactors	Balers	MARATHON	61509	400000091834
COMPACTOR	Balers / Compactors	Compactors	MARATHON	300946	400000091821

Basic information regarding all active assets at the Site location.

Work Orders

[Next 60 Days](#) [Next 30 Days](#) [Prev. 3 Months](#) [Prev. 6 Months](#) [Prev. 1 Year](#) [Prev. 2 Years](#)

[Export Results to an Excel document](#)

USM WO #	Svc. Order #	Cust. WO #	Service Type	Call Date	Service Date	Priority	Order Status	Assigned Resource
19028784	16579654		LAND - Weekly Landscape		07/31/2014 10:00am		Customer Request	A & J Landscaping
19028783	16579653		LAND - Weekly Landscape		07/24/2014 10:00am		Customer Request	A & J Landscaping
19028782	16579652		LAND - Weekly Landscape		07/17/2014 10:00am		Customer Request	A & J Landscaping
19028781	16579651		LAND - Weekly Landscape		07/10/2014 10:00am		Customer Request	A & J Landscaping
19028780	16579650		LAND - Weekly Landscape		07/03/2014 10:00am		Customer Request	A & J Landscaping
19024579	16575450		LAND - Parking Lot Sweeping		07/28/2014 10:00am		Customer Request	Fleetwash, Inc.
19024578	16575449		LAND - Parking Lot Sweeping		07/21/2014 10:00am		Customer Request	Fleetwash, Inc.

By default, all work orders scheduled for the location over the next 30 days. To view the Work Order Detail, click the USM WO # hyperlink. To view the Resource Detail, click on the Assigned Resource hyperlink. The grid can be sorted and/or exported to Excel. When more than 10 work orders are available users can page through the results. Click on any of the time frame options (Next 60 days, Previous 3 Months, Previous 6 Months, etc.) to refresh the grid with relevant work order information.

Inspection History

[All History](#) [2 Years](#) [5 Years](#)

Insp. Date	Type	Description
7/10/2012	Janitorial	routine inspection
7/10/2012	Land-Lot	inspection
8/7/2012	Janitorial	routine inspection
8/7/2012	Land-Lot	inspection
9/5/2012	Janitorial	routine inspection
9/5/2012	Land-Lot	lot land exterior assessment
9/5/2012	Rooftop Access	inspection
10/3/2012	Janitorial	routine inspection
10/3/2012	Janitorial	test
10/3/2012	Land-Lot	inspection
11/1/2012	Janitorial	assessment wood floor svc
11/1/2012	Land-Lot	inspection

By default, all inspections completed in the past 2 years for the location. To view the inspection form, click on the Inspection Date hyperlink.

Square Foot History

Tile: 7146	Stock Room: 0	Other 2: 0
Carpet: 28346	Sales Floor: 0	Occupied: 0
Wood: 12148	Other 1: 0	Total: 47640
Comment:		

The active Square Footage for the location.

Resource Detail

The Resource Detail page will display different sections of information based on whether the Resource is a Sub-contractor or a Self-Perform crew.

Sub-Contractor Detail

SECTION	DESCRIPTION
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<p style="text-align: center;">Resource Detail View the resource detail below</p> <p>Resource Info</p> <p>Name: Kim Fosdick (dba) Type of Work: Cleaning, On Demand Start Date: 4/5/2007 12:00:00 AM Contact: Rodney Fosdick, Jr. Phone: (770) 680-8687 Fax: (770) 427-7683 Email: rfosdick2@bellsouth.net Comments: Company previously did business under the name Rodney Fosdick dba A-1 Group This company offers additional services: Hardwood, water damage, flood and mold restoration Too far for Florida janitorial but interested in Atlanta, GA Does Dailes at Alpharetta & Duluth</p> <p>Address 1: Southern Flooring Address 2: 3443 Timberlake Court City: Kennesaw State: GA Zip: 30144</p>	<p>Provides basic Contractor information such as Name, basic contact information, and the types of work the Contractor performs.</p>										
<p>Phone #'s</p> <table border="1"> <thead> <tr> <th>Phone Type</th> <th>Phone Number</th> </tr> </thead> <tbody> <tr> <td>Rodney cell phone</td> <td> (770) 680-8687</td> </tr> </tbody> </table>	Phone Type	Phone Number	Rodney cell phone	(770) 680-8687	<p>Additional phone numbers on file for the contractor.</p>						
Phone Type	Phone Number										
Rodney cell phone	(770) 680-8687										
<p>Compliance Details</p> <table border="1"> <thead> <tr> <th>Document Type</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>Contractor Compliance Certification</td> <td>Compliant</td> </tr> <tr> <td>General Liability Insurance</td> <td>Compliant</td> </tr> <tr> <td>Sub Contractor Agreements</td> <td>Compliant</td> </tr> <tr> <td>Workers Compensation Insurance</td> <td>Not Compliant</td> </tr> </tbody> </table>	Document Type	Status	Contractor Compliance Certification	Compliant	General Liability Insurance	Compliant	Sub Contractor Agreements	Compliant	Workers Compensation Insurance	Not Compliant	<p>Basic compliance information including status of Compliance Certification, GL Insurance, Subcontractor Agreement and Workers Compensation Insurance.</p>
Document Type	Status										
Contractor Compliance Certification	Compliant										
General Liability Insurance	Compliant										
Sub Contractor Agreements	Compliant										
Workers Compensation Insurance	Not Compliant										
<p>Status Info</p> <p>Compliance Warning: Compliance Do Not Use: Do Not Use: Do Not Pay:</p> <p>Legal Do Not Pay: At Capacity: Volume Discount: Participating</p>	<p>Basic status information of overall compliance and various system "holds".</p> <p>Compliance Warning – Contractor on warning for non-compliance with the items in the Compliance section. 30 days on warning results in "Compliance Do Not Use" status.</p> <p>Compliance Do Not Use – Contractor cannot be assigned to additional services until vendor is Compliant with the items in the Compliance section.</p>										

Do Not Use – Contractor cannot be assigned to additional services for operational reasons.

Do Not Pay – Contractor payment hold for operational reasons.

Legal Do Not Pay – Contractor payment hold for legal reasons.

At Capacity – Contractor flagged as At Capacity meaning the contractor can take on no additional services due to capacity constraints.

Volume Discount – Status of participation in the USM volume discount program.

Assignments

[Active](#) [Previous 12 Months](#)

Export Results to an Excel document

WO Dsc	Acct	Site #	City	State	Start Date	End Date
JANITORIAL - Dry Screening Service	Bed Bath & Beyond Consolidated	00052	Columbia	MD	06/01/2013	
JANITORIAL - Dry Screening Service	Bed Bath & Beyond Consolidated	00168	Snelville	GA	06/01/2013	
JANITORIAL - Dry Screening Service	Bed Bath & Beyond Consolidated	00280	Marietta	GA	06/01/2013	
JANITORIAL - Dry Screening Service	Bed Bath & Beyond Consolidated	00148	Birmingham	AL	06/02/2013	
JANITORIAL - Dry Screening Service	Bed Bath & Beyond Consolidated	00306	Arlington	VA	06/02/2013	
JANITORIAL - Dry Screening Service	Bed Bath & Beyond Consolidated	00266	Eatontown	NJ	06/02/2013	
JANITORIAL - Dry Screening Service	Bed Bath & Beyond Consolidated	00182	Springfield	PA	06/02/2013	
JANITORIAL - Dry Screening Service	Bed Bath & Beyond Consolidated	00199	Columbia	SC	06/02/2013	
JANITORIAL - Dry Screening Service	Bed Bath & Beyond Consolidated	00156	Glen Allen	VA	07/01/2013	
JANITORIAL - Dry Screening Service	Bed Bath & Beyond Consolidated	00258	Elizabeth	NJ	08/01/2013	

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By default, a list of the contractor’s currently active assignments. To view the relevant Site Detail, click the Site # hyperlink. The user can sort and/or export the grid contents to Excel. Users may also expand the grid to all assignments active AND inactive over the past 12 months by clicking “Previous 12 Months”. When more than 10 assignments appear in the grid the user will have the ability to page through the results.

Work Orders

[Next 60 Days](#) [Next 30 Days](#) [Prev. 3 Months](#) [Prev. 6 Months](#) [Prev. 1 Year](#) [Prev. 2 Years](#)

[Export Results to an Excel document](#)

USM WO #	Svc. Order #	Cust. WO #	Site #	Service Type	Call Date	Service Date	Priority	Order Status
19562893	17113137		03001	FLS - Extinguisher Annual Inspection - Elevator Location		07/31/2014 07:00am		Customer Request
19562687	17112931		00301	FLS - Extinguisher Annual Inspection - Elevator Location		07/31/2014 07:00am		Customer Request
19562580	17112824		00060	FLS - Extinguisher Annual Inspection - Elevator Location		07/31/2014 07:00am		Customer Request
19562567	17112811		00033	FLS - Extinguisher Annual Inspection - Elevator Location		07/31/2014 07:00am		Customer Request
19239953	16790515		00252	FLS - Sprinkler - Quarterly Inspection		07/31/2014 07:00am		Customer Request
19230438	16781003		07040	FLS - Sprinkler Annual Inspection		07/31/2014 07:00am		Customer Request
19230370	16780935		06326	FLS - Sprinkler Annual Inspection		07/31/2014 07:00am		Customer Request
19230266	16780831		06185	FLS - Sprinkler Annual Inspection		07/31/2014 07:00am		Customer Request

By default, all work orders scheduled for the contractor over the next 30 days. To view the Work Order Detail, click the USM WO # hyperlink. To view the Site Detail, click on the Site # hyperlink. The grid can be sorted and/or exported to Excel. When more than 10 work orders are available users can page through the results. Click on any of the time frame options (Next 60 days, Previous 3 Months, Previous 6 Months, etc.) to refresh the grid with relevant work order information.

Employees

Name	Create Date
Gary S Shipman	6/1/2011 12:18:41 PM
William Harvey	6/1/2011 12:18:41 PM

A list of the contractor's current employee list in the National Accounts System.

Self-Perform Detail

SECTION	DESCRIPTION																																																	
<p>Resource Info</p> <p>Crew Name: RLHSHOW Line of Business: Janitorial Created On: 2/7/2011 3:44:54 PM Crew Size: 1 Crew Leader: Maria H Puchuela</p> <p>Address 1: 1458 Webster Ave Address 2: City: Bronx State: NY Zip: 10456</p>	<p>Provides basic Crew information such as Crew Name, Size, Crew Leader and Address.</p>																																																	
<p>Assignments</p> <p>Active Previous 12 Months</p> <p>Export Results to an Excel document</p> <table border="1"> <thead> <tr> <th>WO Desc</th> <th>Acct</th> <th>Site #</th> <th>City</th> <th>State</th> <th>Start Date</th> <th>End Date</th> </tr> </thead> <tbody> <tr> <td>Extra Service-Self Perform</td> <td>Ralph Lauren</td> <td>RLHSHOW</td> <td>New York</td> <td>NY</td> <td></td> <td></td> </tr> <tr> <td>SELF PERFORM TRACKING CODE</td> <td>Ralph Lauren</td> <td>RLHSHOW</td> <td>New York</td> <td>NY</td> <td></td> <td></td> </tr> <tr> <td>Self-Perform Daily Maint 2 Days/Wk</td> <td>Ralph Lauren</td> <td>RLHSHOW</td> <td>New York</td> <td>NY</td> <td></td> <td></td> </tr> <tr> <td>Special Service Self Perform</td> <td>Ralph Lauren</td> <td>RLHSHOW</td> <td>New York</td> <td>NY</td> <td></td> <td></td> </tr> <tr> <td>Tracking Code- Corp Office- 18th Floor Cleaning Service</td> <td>Ralph Lauren</td> <td>RLHSHOW</td> <td>New York</td> <td>NY</td> <td></td> <td></td> </tr> <tr> <td>Tracking Code- Special Service Corp Office- 18th Floor</td> <td>Ralph Lauren</td> <td>RLHSHOW</td> <td>New York</td> <td>NY</td> <td></td> <td></td> </tr> </tbody> </table>	WO Desc	Acct	Site #	City	State	Start Date	End Date	Extra Service-Self Perform	Ralph Lauren	RLHSHOW	New York	NY			SELF PERFORM TRACKING CODE	Ralph Lauren	RLHSHOW	New York	NY			Self-Perform Daily Maint 2 Days/Wk	Ralph Lauren	RLHSHOW	New York	NY			Special Service Self Perform	Ralph Lauren	RLHSHOW	New York	NY			Tracking Code- Corp Office- 18th Floor Cleaning Service	Ralph Lauren	RLHSHOW	New York	NY			Tracking Code- Special Service Corp Office- 18th Floor	Ralph Lauren	RLHSHOW	New York	NY			<p>By default, a list of the crew's currently active assignments. To view the relevant Site Detail, click the Site # hyperlink. The user can sort and/or export the grid contents to Excel. Users may also expand the grid to all assignments active</p>
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Work Order Detail

The table below provides a description of each section of information visible on the Work Order Detail page.

SECTION	DESCRIPTION
<p style="text-align: center;">Work Order Detail View the work order detail below Click here to Print Work Order</p>	<p>At the top of the page below the header, a hyperlink provides the ability to print the physical work order relevant to the work. Users can retrieve the document from the</p>

	"Retrieve Reports" page.															
<p>Site Info</p> <p>National Account: Abercrombie & Fitch - WOM Site #: 10425 Site Name: A&F Address 1: 3111 West Chandler Blvd. Address 2: Space #2036 Address 3: Chandler Fashion City: Chandler State: AZ Zip: 85226 Start Date: 06/01/2010</p> <p>Contact: Store Manager Phone: (480) 792-9275 Fax: User: Svc Line: Info:</p>	Provides basic site information such as account, address, and basic contact information. The "Svc Line" field will also provide more information on the lines of service applicable to the site.															
<p>Work Order Info</p> <p>USM WO #: 18962687 Service Type: Electrical Service Call Service Code: E1 Service Order #: 16513634 Call Date: 1/7/2014 8:00:00 AM Spoke To: Sans, Amber Order Status: Completed</p> <p>Service Date: 01/08/2014 08:00am Priority: Medium Order Type: Standard WO Notes: Electrical - outlet, wall (1) - register not working, no power per POS tech - Cashwrap Resource Name: VF Electric, Inc.</p>	Basic work order information such as the service type, service date, description of service, assigned resource and service status. To view the Resource Detail, click on the Resource Name hyperlink.															
<p>Comments</p> <table border="1"> <thead> <tr> <th>Date</th> <th>User</th> <th>Comment</th> </tr> </thead> <tbody> <tr> <td>1/7/2014 8:01:21 AM</td> <td>dmeservey</td> <td>VF Electric</td> </tr> <tr> <td>1/7/2014 8:01:21 AM</td> <td>dmeservey</td> <td>Electrical - outlet, wall (1) - register not working, no power per POS tech - Cashwrap</td> </tr> <tr> <td>1/7/2014 2:04:16 PM</td> <td>dmeservey</td> <td>Sch 1/8</td> </tr> <tr> <td>1/9/2014 8:42:36 AM</td> <td>dmeservey</td> <td>Complete per IVR</td> </tr> </tbody> </table>	Date	User	Comment	1/7/2014 8:01:21 AM	dmeservey	VF Electric	1/7/2014 8:01:21 AM	dmeservey	Electrical - outlet, wall (1) - register not working, no power per POS tech - Cashwrap	1/7/2014 2:04:16 PM	dmeservey	Sch 1/8	1/9/2014 8:42:36 AM	dmeservey	Complete per IVR	All comments associated with the work order.
Date	User	Comment														
1/7/2014 8:01:21 AM	dmeservey	VF Electric														
1/7/2014 8:01:21 AM	dmeservey	Electrical - outlet, wall (1) - register not working, no power per POS tech - Cashwrap														
1/7/2014 2:04:16 PM	dmeservey	Sch 1/8														
1/9/2014 8:42:36 AM	dmeservey	Complete per IVR														
<p>Related Work Orders</p> <p><i>No related Work Orders have been found</i></p>	If the work order is linked to other work orders (examples include large projects involving multiple vendors, recall work, etc.), related work orders information will display with the option to view the Work Order Detail page associated with each related work order.															
<p>IVR Info</p> <table border="1"> <thead> <tr> <th>Time In</th> <th>Time Out</th> </tr> </thead> <tbody> <tr> <td>9/27/2013 2:05:33 PM</td> <td>9/27/2013 3:34:27 PM</td> </tr> <tr> <td>9/28/2013 8:03:01 AM</td> <td>9/28/2013 9:31:59 AM</td> </tr> </tbody> </table>	Time In	Time Out	9/27/2013 2:05:33 PM	9/27/2013 3:34:27 PM	9/28/2013 8:03:01 AM	9/28/2013 9:31:59 AM	IVR check in and out information relevant to the									
Time In	Time Out															
9/27/2013 2:05:33 PM	9/27/2013 3:34:27 PM															
9/28/2013 8:03:01 AM	9/28/2013 9:31:59 AM															

						work order.
Asset Info						Any assets serviced as part of the work order.
Type	Category	Sub Category	Manufacturer	Serial #	Catalog #	
DOOR ENTRANCE 1	Automatic Door	Automatic Doors	BESAM	ND	400000091575	
DOOR ENTRANCE 2	Automatic Door	Automatic Doors	BESAM	ND	400000091574	
DOOR EXIT 1	Automatic Door	Automatic Doors	BESAM	ND	400000091573	
DOOR EXIT 2	Automatic Door	Automatic Doors	BESAM	ND	400000091572	
DOOR RECEIVING PERSONNEL	Automatic Door	Automatic Doors	ND	ND	400000091814	
BALER	Balers / Compactors	Balers	MARATHON	61509	400000091834	
COMPACTOR	Balers / Compactors	Compactors	MARATHON	300946	400000091821	
Inspection History						Any inspection forms linked directly to the work order.
All History 2 Years 5 Years <i>No associated Inspections have been found</i>						

Reporting

Four types of reporting are available on the Field QC Portal: Visit Compliance, Inspection Data, Inspection Submission and Scheduler Service Detail. Reporting on the portal follows a request/retrieve process where the end user supplies parameters for the report, submits the request, and then retrieves the completed report output. This allows the user to continue working in the portal or move on to other activities while report requests are processed on the server side and retrieve the output at their convenience.

All output is generated to Excel which allows the end user to manually customize the format as necessary.

Visit Compliance

The Visit Compliance report offers a comparison of the number of contracted visits by account by inspection type versus the number of actual visits based on quantity of submitted inspection forms. The baseline of contracted visits by account by inspection type must be defined in the National Accounts System.

Defining Contracted Visits

The contracted number of visits by inspection type and location can be defined in the National Accounts System using the *Field Inspection Visit Windows* form.

On initial load, the visit windows form will display a set of search parameters and an empty grid. The grid will be empty because no visit requirements have been added to the system yet.

To add a new visit requirement, right click on the grid and choose "Add" from the context menu.

Name	Frequency	Dates	Volume	Type	Description
Bed Bath and Beyond	Quarterly		1	Janitorial	Routine Janitorial Inspection

On Add, you will see the Field Inspection Visit Window Maintenance screen. This screen allows the user to select one or more store locations and define the inspection type and frequency of inspection required for the selected locations.

Sel	Store #	City	State	Region	District	RDO	Program Type	Start Dt
-----	---------	------	-------	--------	----------	-----	--------------	----------

If no National Account was chosen on the preceding selection screen, the National Account dropdown will be enabled and will require the user to select an account. Once an account is selected, right click on the store location grid and choose the option to "Load Grid" from the context menu. This will populate the store location grid with all active store locations for the National Account selected.

Field Inspection Visit Window Maintenance

Locations

National Account: A & P Supermarkets Land/Lot 08 Active All Lines of Business

Location Service Line: All

Sel	Store #	City	State	Region	District	RDO	Program Type	Start Dt
<input checked="" type="checkbox"/>	108	Mystic	CT					4/5/2006
<input type="checkbox"/>	949	Clinton	NJ					4/5/2006
<input type="checkbox"/>	270	South Orange	NJ					6/20/2008
<input type="checkbox"/>	405	Bridgeport	CT					7/24/2008

Visit Windows

Frequency

Recurring Custom

Volume: 1

Type

Inspection Type:

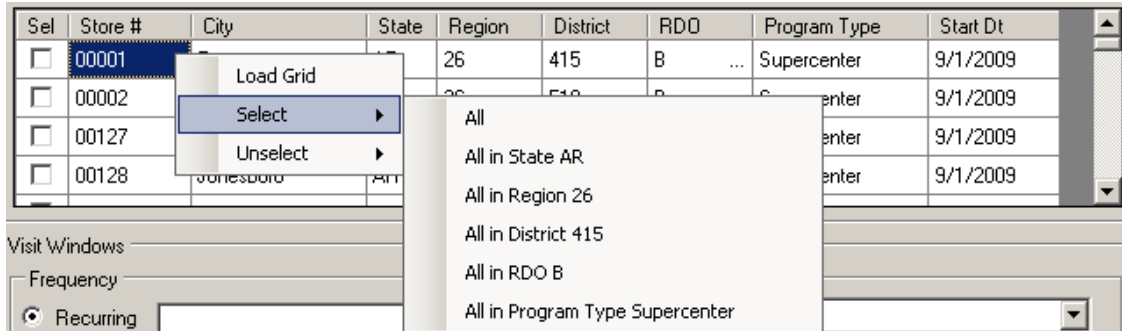
Visit Requirement Dsc:

Save Cancel

Now that you have a list of locations for the account, you can choose the subset of locations for which this visit requirement applies a number of different ways:

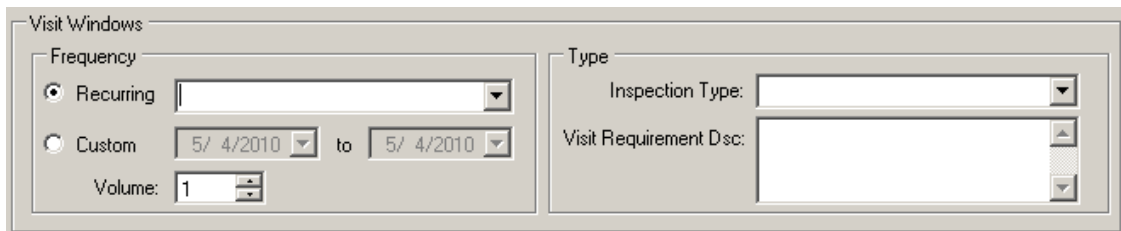
- Click the “Sel” checkbox next to the individual store locations
- With your mouse positioned over the grid contents, right click and mouse to the “Select” sub menu:
 - Choose “All” if you would like to select All store locations in the grid
 - Choose “All in State of *State*” if you would like to select all store locations in the same state as the store record underneath your mouse pointer. For example, if I right-click on the grid over a store located in Arkansas, I will see an option for selecting “All in State AR” which will select all locations in Arkansas.
 - Choose “All in Region *Region*” if you would like to select all store locations in the same customer region as the store record underneath your mouse pointer.
 - Choose “All in District *District*” if you would like to select all store locations in the same customer district as the store record underneath your mouse pointer.
 - Choose “All in RDO *RDO*” if you would like to select all store locations in the same customer RDO (another option for grouping store locations, similar to Region and District) as the store record underneath your mouse pointer.
 - Choose “All in Program Type *Program Type*” if you would like to select all store locations in the same customer Program Type as the store record underneath your mouse pointer.

Note that if customer-specific store groupings (i.e. Region, District, RDO and Program Type) are not in use for a particular National Account, these selection options will be disabled.



The same options exist to Unselect store locations under the Unselect submenu of the store location grid context menu.

Once you have selected the locations relevant to the visit requirement, you will need to define a frequency of visit and the type of inspection required.



The frequency of visitation can be defined as Recurring or Custom. An example of a recurring visitation requirement might be: *2 janitorial inspection visits per quarter according to the contract.* An example of a custom visitation requirement might be: *1 visit between now and June 1 in order to price locations for Business Development.*

Options for a Recurring visitation frequency include: Monthly, Quarterly and Annually. If Recurring is chosen as the Visit Frequency, the user must select Monthly, Quarterly or Annually.

If Custom is chosen as the Visit Frequency, the user must define a start and end date for the visit window.

A visit volume of 1 or more is required.

The Inspection Type identifies the type of inspection required. Available inspection types include: Janitorial, Janitorial Workplace Inspection, Land-Lot, Snow Event, Electrical-Lighting, Retrofit, Asset, and Exterior Assessment. The user must choose the type of inspection as part of the visitation requirement.

The visit requirement description allows the user to provide a free text description of the visitation requirement. For example, if the visit requirement is a Janitorial Inspection but the reason we are setting up the visitation requirement is to specifically address/inspect "problem stores", a visit requirement description might be something like "Targeted inspection of problem store locations". The purpose is to provide a context to understand the reason for the inspection requirement.

In the following completed example, we've established that an exterior assessment must be performed for each Walmart location in the state of Arkansas between 5/4/2010 and 6/1/2010. The purpose is to meet with the vendor and review both the protocol and scope of work.

Field Inspection Visit Window Maintenance

Locations

National Account: Wal-Mart, Inc. Active All Lines of Business

Location Service Line: All

Sel	Store #	City	State	Region	District	RDO	Program Type	Start Dt
<input checked="" type="checkbox"/>	00001	Rogers	AR	26	415	B ...	Supercenter	9/1/2009
<input checked="" type="checkbox"/>	00002	Harrison	AR	26	518	B ...	Supercenter	9/1/2009
<input checked="" type="checkbox"/>	00127	Malvern	AR	26	324	B ...	Supercenter	9/1/2009
<input checked="" type="checkbox"/>	00128	Jonesboro	AR	26	509	B ...	Supercenter	9/1/2009

Visit Windows

Frequency

Recurring Annually

Custom 5/ 4/2010 to 6/ 1/2010

Volume: 1

Type

Inspection Type: Exterior Assessment

Visit Requirement Dsc: Initial meeting with Vendor at sites to review protocol and scope of work.

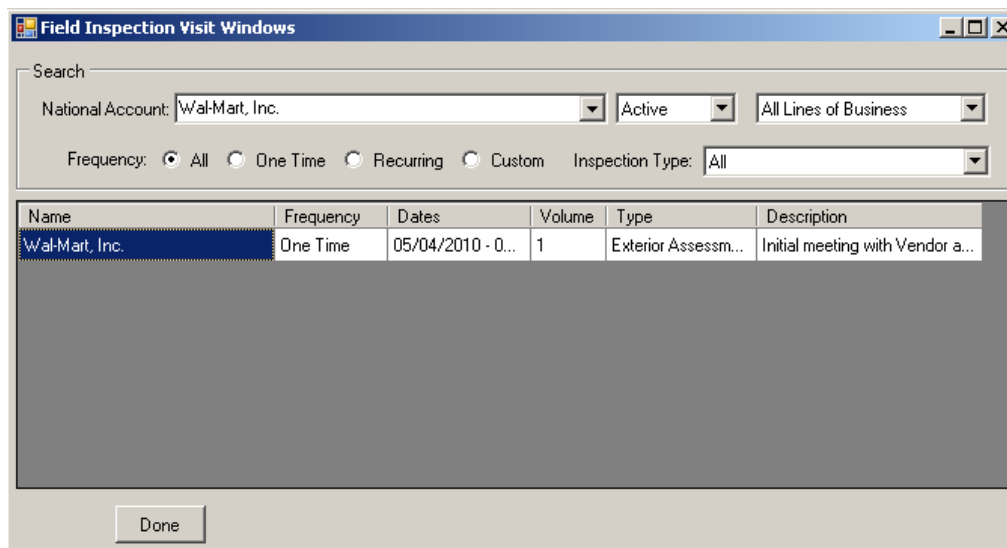
Save Cancel

Once you have completed definition of your inspection visit requirement, click the Save button. If any required fields are empty, you will be prompted to supply the data prior to proceeding.

Back in the selection form, you can choose to exit the form completely or make additional changes to an account's visitation requirements. If you choose to make additional changes or review existing visitation requirements, you will be required to supply one of the following sets of search parameters:

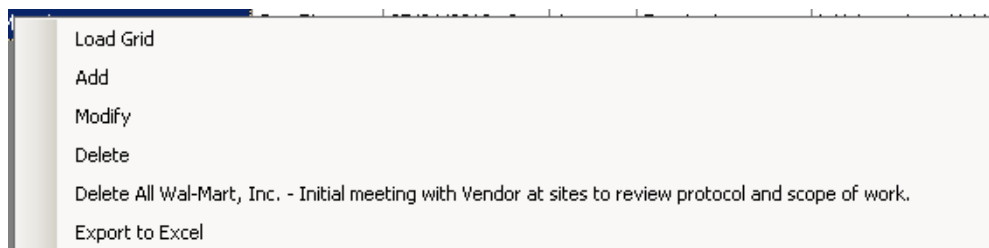
- National Account
- Inspection Type and Frequency

Once you have supplied search parameters, right click on the grid and select Load Grid. The visitation requirement grid will load with all visit windows meeting your supplied criteria. In the example below, we've loaded all existing visitation requirements for the Walmart account.



The user now has the option of several items on the grid context menu:

- **Add** – Add a new visitation requirement.
- **Modify** – Modify an existing visitation requirement.
- **Delete** – Delete an existing visitation requirement.
- **Delete All Visit Requirement Dsc** – Allows the user to delete all visitation requirements with the same visit requirement description as the record selected. Let's say we are required to perform an exterior assessment for all Walmart locations, but the deadline to perform the assessment varies by Walmart region. In this scenario we would set up a visit requirement for each Walmart region with the applicable deadline to complete the visits, entering the same visit requirement description for each. If it was then communicated that the visitation requirement would be extended by 6 months and the same deadline for all locations across the account, we could then choose this option to delete all existing visit requirements related to this initiative and create one new consolidated requirement for the account.
- **Export to Excel** – exports the current grid contents to an Excel spreadsheet



Visit Compliance Report Parameters

Once visit requirements have been defined in the National Accounts System, users can run reports using the Field QC Web Portal on how well USM is meeting these visit requirements. The Visit Compliance report provided on the Field QC Web Portal allows users to select from a number of report parameters and returns the relevant visitation requirements versus the number of related inspection forms submitted to the system.

Available report parameters on the Visit Compliance report are as follows:

- **National Account** – the customer account identified for the visitation requirement
- **Site** – optional parameter. Allows the user to select a specific store location identified for the visitation requirement
- **Region** – optional parameter. Allows the user to identify a USM Region relevant to the visitation requirement. To establish USM Regions, see Appendix A, [Creating USM Regions](#).
- **Inspection Type** – the type of inspection associated with the visitation requirement
- **Frequency** – the frequency of the visitation requirement. Options are Monthly, Quarterly, Annually or Custom.
- **Start Year/End Year** – range of years against which actual inspection data will be gathered for the report. By default, the start and end year will default to the current year (i.e. any inspections submitted in the current calendar year).

Visit Compliance

Enter your search criteria below. * = required information

* National Account:	<input type="text"/>		
Site #:	Select Site		
Region:	<input type="text" value="All Regions"/>		
* Inspection Type:	<input type="text" value="Janitorial"/>	* Frequency:	<input type="text" value="Monthly"/>
* Start Year:	<input type="text" value="2010"/>	* End Year:	<input type="text" value="2010"/>
<input type="button" value="Submit Report"/>			

Clicking "Submit Report" will submit the report request to the report processor and display the following message and link to the report retrieval page:

Your request has been submitted to our report generator. It will be made available shortly and will be available for download on the [Reports Page](#).

Visit Compliance Report Output

Clicking on the Reports Page link, will redirect the user to all completed report requests available for download.

Retrieve Reports

Your report requests are listed below. Once a report has been generated, you may download it by clicking on the associated link.

Status: Retrieved

Request ID	Report	Date Requested	Status	Selection	Download
4957738	FQC Inspection Data Report.xls	7/11/2014 12:07:24 AM	Completed	National Accounts: 1199 - Bed Bath & Beyond Consolidated, Visit From: 7/1/2014 To: 7/11/2014, Inspection Type: Janitorial, Created By: All Users	Download
4957739	FQC Inspection Submission Report.xls	7/11/2014 12:08:15 AM	Completed	National Accounts: All Accounts, Visit From: 7/1/2014 To: 7/11/2014, Inspection Type: All Inspection Types, Status: All, Created By: All Users	Download
4957741	FQCSchedulerServiceDetail.xls	7/11/2014 12:13:42 AM	Completed	National Accounts: 1199 - Bed Bath & Beyond Consolidated, All Sites, All Work Order Groups, All Work Order Codes, All Statuses, All Sub Statuses From Service Date: 7/1/2014 To 7/11/2014, All States	Download
4957742	VisitComplianceReport.xls	7/11/2014 12:15:42 AM	Completed	National Account: 1199 - Bed Bath & Beyond Consolidated, Site #: All Sites, Region: All Regions, Inspection Type: All Inspection Types, Frequency: All, From: 01/2014, To: 12/2014, Requested By: Imatteo	Download

The Visit Compliance report generates an Excel Workbook with two tabs: Summary, and Detail.

Summary Tab:

The summary tab provides a rolled up view at the percentage of visit compliance by store location and inspection type based on the visit requirements defined in the National Accounts System. Output columns are as follows:

- **National Account** – customer account of visit requirement
- **Site #** - site location number of visit requirement
- **Inspection Type** – type of inspection associated with visit requirement
- **Visit Window Start** – start of visit requirement window
- **Visit Window End** – end of visit requirement window
- **Visit Requirement Description** – description of visit requirement
- **Expected** – expected volume of visits
- **Actual** – actual volume of visits based on submitted inspection forms
- **Compliance** - % compliance with visit requirements based on actual/estimated

Detail Tab:

The detail tab provides an itemized inventory of inspections submitted against the visit requirements defined in the National Accounts System. Output columns are as follows:

- **National Account** – customer account of visit requirement
- **Site #** - site location number of visit requirement
- **Inspection Date** – date of inspection
- **City** – store location city
- **State** – store location state
- **Region** – customer region
- **District** – customer district
- **RDO** – customer RDO
- **Program Type** – customer Program Type
- **Inspection Type** – type of inspection associated with visit requirement
- **Visit Window Dates** – visit requirement window

- **Visit Requirement Description** - description of visit requirement

Inspection Data

The Inspection Data report allows the user to extract inspection data from submitted inspection reports based on a variety of report parameters.

Inspection Data Report Parameters

The Inspection Data report provided on the Field QC Web Portal allows users to select from a number of report parameters and returns the relevant inspection data collected in the inspection forms to an Excel spreadsheet; allowing the end user to manually customize the output in Excel for the client where/when necessary.

Available report parameters on the Inspection Data report are as follows:

- **National Account** – the customer account for which the inspection was performed
- **Site** – optional parameter. The store location for which the inspection was performed
- **Region** – optional parameter. Selecting a USM Region will return all inspections for store locations falling within the selected region. To establish USM Regions, see Appendix A, [Creating USM Regions](#).
- **Visit Start/Visit End** – optional parameters to define a date range based on inspection date.
- **Submit Start/Submit End** – optional parameters to define a date range based on submission date.
- **Inspection Type** – the type of inspection associated with the visitation requirement
- **Created By** – optional parameter. National Accounts System/Field QC Portal login id of user who created the inspection.



Inspection Data



Enter your inspect data criteria below. * = required information

* National Account:

Site #: [Select Site](#)

Region:

Visit Start:  Visit End: 

Submit Start:  Submit End: 

* Inspection Type: Created By:

For the following inspection types, selection of a National Account is required:

- Janitorial
- Land-Lot
- Initial Exterior Assessment
- Monthly Overnight

Clicking "Submit Report" will submit the report request to the report processor and display the following message and link to the report retrieval page:

Submit Report

Your request has been submitted to our report generator. It will be made available shortly and will be available for download on the [Reports Page](#).

Inspection Data Report Output

Clicking on the Reports Page link, will redirect the user to all completed report requests available for download.

Retrieve Reports

Your report requests are listed below. Once a report has been generated, you may download it by clicking on the associated link.

Request ID	Report	Date Requested	Status	Selection	Download
4957738	FQC Inspection Data Report.xls	7/11/2014 12:07:24 AM	Completed	National Accounts: 1199 - Bed Bath & Beyond Consolidated, Visit From: 7/1/2014 To: 7/11/2014, Inspection Type: Janitorial, Created By: All Users	Download
4957739	FQC Inspection Submission Report.xls	7/11/2014 12:08:15 AM	Completed	National Accounts: All Accounts, Visit From: 7/1/2014 To: 7/11/2014, Inspection Type: All Inspection Types, Status: All, Created By: All Users	Download
4957741	FQCSchedulerServiceDetail.xls	7/11/2014 12:13:42 AM	Completed	National Accounts: 1199 - Bed Bath & Beyond Consolidated, All Sites, All Work Order Groups, All Work Order Codes, All Statuses, All Sub Statuses From Service Date: 7/1/2014 To 7/11/2014, All States	Download
4957742	VisitComplianceReport.xls	7/11/2014 12:15:42 AM	Completed	National Account: 1199 - Bed Bath & Beyond Consolidated, Site #: All Sites, Region: All Regions, Inspection Type: All Inspection Types, Frequency: All, From: 01/2014, To: 12/2014, Requested By: Inattheo	Download

The Inspection Data report generates a one tab Excel workbook. The format of the report is dependent on the inspection type selected in the report parameters.

The following columns will be consistent across all inspection types:

- **Created By** – National Accounts System/Field QC Portal login id of user who created the inspection.
- **National Account** – the customer account for which the inspection was performed
- **Site #** - site location number of visit requirement
- **Site State** – state in which the site is located
- **Site City** – city in which the site is located
- **SC Rep** – USM WOM Rep assigned to site location
- **Attending Service** – flag indicating whether the inspection was conducted during service
- **Visit Date** – date of inspection
- **Submit Date** – date inspection report was submitted
- **InspectionGUID** – Global Unique Identifier of inspection form

The remaining columns will be specific to the form for that inspection type. Each column heading will contain **SectionName / InspectionQuestion**, where SectionName is the name of the section on the inspection form and InspectionQuestion is the full question from the inspection form.

EntrancesRequest?	EntrancesAttending Service?	EntrancesEntrances:	EntrancesGlass:	EntrancesMats:	EntrancesWindows:	EntrancesPlease identify any maintenanc
N	N/A	3 - Good	3 - Good	3 - Good	3 - Good	n/a
N	N/A	3 - Good	3 - Good	4 - Very Good	3 - Good	None
d Y	N/A	3 - Good	3 - Good	2 - Fair	3 - Good	Dried gum in carpeting
N	N/A	3 - Good	3 - Good	3 - Good	3 - Good	New carpet squares in vestibule good.
: N	N/A	3 - Good	3 - Good	3 - Good	3 - Good	none
9 Y	N/A	N/A	N/A	N/A	N/A	N/A
Y	N/A	N/A	N/A	N/A	N/A	none
Y	AM	2 - Fair	2 - Fair	2 - Fair	2 - Fair	the stores exterior aluminum surfaces need t
N	N/A	3 - Good	3 - Good	3 - Good	3 - Good	na
Y	N/A	2 - Fair	2 - Fair	3 - Good	2 - Fair	Air curtain needs cleaning
9 Y	N/A	3 - Good	3 - Good	3 - Good	3 - Good	none

Inspection Submission Report

The Inspection Submission Report provides a streamlined method of determining the volume of completed inspection forms by Account, date range, inspection type, etc. The results include basic inspection header information (QC User, Date of Inspection, Type of Inspection, Location, etc.) without the overhead involved in providing every inspection form response and question relevant to the set of inspection forms.

Inspection Submission

Enter your inspect data criteria below. * = required information

* National Account:

Visit Start:

Submit Start:

Inspection Type:

Status:

Visit End:

Submit End:

Created By:

Your request has been submitted to our report generator. It will be made available shortly and will be available for download on the [Reports Page](#).

Created By	National Account	Site #	Site State	Site City	SC Rep	Attending Service	Visit Date	Submit Date	Inspection Type	Status
kwingfield	Ross Stores Janitorial	0340	AZ	Phoenix	Leann Maitland		12/31/2013	1/1/2014	Ross Janitorial	Complete
abernal	Ross Stores Janitorial	0157	CA	Lakewood	Jeffry Chang		12/28/2013	1/1/2014	Ross Janitorial	In Progress
chatch	Ross Stores Janitorial	1502	NV	Elko	Leann Maitland		12/30/2013	1/1/2014	Ross Janitorial	Complete
rcastillo	Ross Stores Janitorial	0409	CA	NOVATO	Jeffry Chang		12/9/2013	1/1/2014	Ross Janitorial	Complete
kwingfield	Ross Stores Janitorial	1331	AZ	Phoenix	Jeffry Chang		12/31/2013	1/1/2014	Ross Janitorial	Complete
abernal	Ross Stores Janitorial	0216	CA	La Habra	Jeffry Chang		12/31/2013	1/1/2014	Ross Janitorial	Complete
kwingfield	Ross Stores Janitorial	0266	AZ	Peoria	Leann Maitland		12/31/2013	1/1/2014	Ross Janitorial	Complete
kwingfield	Ross Stores Janitorial	0412	AZ	Phoenix	Leann Maitland		12/31/2013	1/1/2014	Ross Janitorial	Complete
kwingfield	Ross Stores Janitorial	0577	AZ	Phoenix	Leann Maitland		12/31/2013	1/1/2014	Ross Janitorial	Complete
abernal	Ross Stores Janitorial	0157	CA	Lakewood	Jeffry Chang		12/28/2013	1/1/2014	Ross Janitorial	Complete

Scheduler Service Detail Report

The Scheduler Service Detail report provides scheduled work order information from the National Accounts System with basic service information such as service date, status, assigned resource, etc.

Scheduler - Service Detail Report

Enter your reporting criteria below. * = required information

* National Account:

Site #:

WO Group:

Status:

* Service Date From:

Site State:

WO Code:

Sub Status:

To:

AccountID	Account	StoreNo	StoreName	StoreAddress1	StoreAddress2	StoreAddress3	StoreCity	Store State	Store Zip	StoreStartDate	StoreEndDate	StoreUser	USMRegion	WOCCode	WOCCodeDescription	ServiceWONoSystem	ServiceDate
1247	01ServiceChannel	1	Coyles Store	123 Any St			Andalusia	PA	19020	6/19/2014 12:00 AM			Ohio Valley	P1	Planned WO Coce	20037017	07/01/2014
1247	01ServiceChannel	1	Coyles Store	123 Any St			Andalusia	PA	19020	6/19/2014 12:00 AM			Ohio Valley	IWW	WOM	20037018	07/01/2014
1247	01ServiceChannel	1	Coyles Store	123 Any St			Andalusia	PA	19020	6/19/2014 12:00 AM			Ohio Valley	IWW	WOM	20037019	07/01/2014
1247	01ServiceChannel	1	Coyles Store	123 Any St			Andalusia	PA	19020	6/19/2014 12:00 AM			Ohio Valley	IWW	WOM	20037020	07/01/2014
1247	01ServiceChannel	1	Coyles Store	123 Any St			Andalusia	PA	19020	6/19/2014 12:00 AM			Ohio Valley	IWW	WOM	20037021	07/01/2014
1247	01ServiceChannel	1	Coyles Store	123 Any St			Andalusia	PA	19020	6/19/2014 12:00 AM			Ohio Valley	IWW	WOM	20037025	07/01/2014
1247	01ServiceChannel	1	Coyles Store	123 Any St			Andalusia	PA	19020	6/19/2014 12:00 AM			Ohio Valley	IWH	WOM Asset 2	20037026	07/01/2014
1247	01ServiceChannel	1	Coyles Store	123 Any St			Andalusia	PA	19020	6/19/2014 12:00 AM			Ohio Valley	IWW	WOM	20037027	07/01/2014
1247	01ServiceChannel	1	Coyles Store	123 Any St			Andalusia	PA	19020	6/19/2014 12:00 AM			Ohio Valley	P1	Planned WO Coce	20037016	06/25/2014
1247	01ServiceChannel	1	Coyles Store	123 Any St			Andalusia	PA	19020	6/19/2014 12:00 AM			Ohio Valley	IWW	WOM	20037023	06/20/2014
1247	01ServiceChannel	1	Coyles Store	123 Any St			Andalusia	PA	19020	6/19/2014 12:00 AM			Ohio Valley	IWW	WOM	20037004	06/19/2014

Retrieve Reports

The report retrieval page allows the user to download the output generated from reporting requests.

The page displays the Request ID, the name of the report file to be generated, the date requested, the status of the request, the Selection parameters and an option to download the report if the report has completed.

Users can only download reports that they have requested.

If a report is still processing, the Status will display as Processing and no option will exist to Download the file.

Clicking the “Refresh” button will refresh the grid with an updated status of pending reports.

Clicking the “Download” link will launch the report in Excel. Once a report is downloaded, it will be removed from the Report Retrieval page.

Retrieve Reports

Your report requests are listed below. Once a report has been generated, you may download it by clicking on the associated link.

Status: ▼

Request ID	Report	Date Requested	Status	Selection	Download
4356178	FQC Inspection Submission Report.xls	6/6/2014 4:05:46 PM	Completed	Accounts: 953,973,995,761,1194,994,382,690, 953,799,1117,872,1168,873,129,123 7,117,1108,919,966,1203,1105,1104 .1216,529,1195,1231,1169,1153,109 8,1009,1228,945,527,1094,1226,120 8,495,1167,1,1088,1087,1085,1084, 1010,1148,1242,1081,638,1080,552, 32,1219,1213,1077,958,697,908,407 .1075,1227,151,1017,380,1073,1072 .983,1016,1070,1068, Visit From: 6/1/2014 To: 6/30/2014, Inspection Type: All Inspection Types, Status: All Statuses, Created By: All Users	Download
4356195	FQC Inspection Submission Report.xls	6/10/2014 10:35:45 AM	Completed	National Accounts: 1199 - Bed Bath & Beyond Consolidated, Submit From: 1/1/2014 To: 6/6/2014, Inspection Type: Land-Lot, Status: All, Created By: All Users	Download
4356237	US Bank Order # 19509380.pdf	6/26/2014 8:05:12 AM	Requested	Account: US Bank Store: 0 Contractor: 0 WorkOrders: Generate By: By Work Order Print type: By Date	
				National Accounts: 1222 - Makeup, Visit From: 3/1/2014 To:	

Appendix A

Viewing Inspection Data in NAS

Authorized National Accounts System users have the option to independently log into the Field QC Web Portal using their National Accounts System login ID and password.

Alternately, if the authorized user is working in the National Accounts System and wishes to access the Field QC Web Portal, selecting the "Visit Field QC Portal" menu item from the Billing Maintenance → Field QC Portal sub menu will launch the web portal in the default browser window without requiring the user to login again.



While working in the National Accounts System, users can view inspection forms related to a store location. In any one of the following screens, if an inspection form has been submitted related to the store location displayed, the store number will display in blue underlined text.

- Store Maintenance
- Assign Work Order Code to Store Maintenance
- Order Maintenance (WOM)

The image shows a screenshot of the 'Store Maintenance' form. The title bar says 'Store Maintenance'. Below the title bar, it says 'National Account: A & P Supermarkets Land/Lot 08'. There are several tabs: 'Main Info', 'Additional Info', 'Sq Ft History', 'Monthly Flat Rate History', 'Flat Rate History', and 'Ho...'. The 'Additional Info' tab is selected. Below the tabs, it says 'Store: 108 - A P Supermarkets'. There are two dropdown menus: 'RDO:' and 'Program Type:'. At the bottom, there are two input fields: '# of Bathrooms: 0' and '# of Windows: 0'.

Clicking on the store number on any of the above screens will launch the Visit History form, which consists of a grid of all submitted inspection forms related to the selected store location.

The Visit History form grid contains the following data points:

Inspection Date – date of inspection

Type – type of inspection

Description – field user supplied description of inspection

Attending Service – Boolean indicator of whether the inspection was a service attendance

Created By – login id of user who created the inspection form

The image shows a screenshot of the 'Visit History - Walmart Inc., 00001' form. It contains a table with the following data:

Insp. Date	Type	Description	Attend Svc	Created By
1/15/2010	Janitorial	Routine janitorial Q1	<input type="checkbox"/>	Imatteo
11/3/2009	Janitorial Workplace Inspection	Safety Inspection	<input checked="" type="checkbox"/>	Imatteo
9/1/2009	Exterior Assessment	Initial Exterior Assessment	<input type="checkbox"/>	Imatteo

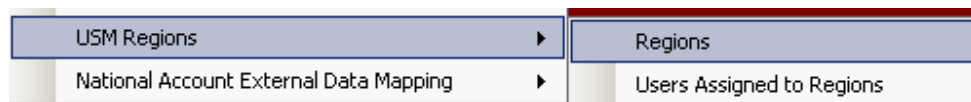
Double clicking on a record in the grid will launch a read-only version of the inspection form in the user's default browser:



Creating USM Regions

Authorized National Accounts System users have the option to add or modify USM regions which can be used as a report parameter on the Inspection Data report available on the Field QC Web Portal.

To add or modify regions, the user will need to navigate to the USM Region Selection form within NAS. (Billing Maintenance → USM Regions → Regions)



The USM Region Selection form displays all USM Regions including the system generated ID number, the name of the region, and the information pertaining to who created the region and when.

Id	Region Name	Created By	Create Dt
32	B	skane	04/19/2010
33	C	skane	04/19/2010
34	Central	akanjanakorn	04/20/2010
3	Region 3	TOWER\rczekay	11/11/2009
36	SK_West	skane	05/04/2010
35	West	akanjanakorn	04/20/2010

OK Cancel

Right clicking on the grid allows the user to Add, Modify or Delete a USM Region.

To define a new region, the user is required to supply a region name and select the states which correspond to the region. Any states which have already been assigned to a region will display with a red exclamation point, but selection is still allowed. The purpose of this is to accommodate regions with overlapping states or definition of new regions for realignment or “what if” scenarios.

Sel	State	Description
<input checked="" type="checkbox"/>	A	Newfoundland
<input type="checkbox"/>	AK	Alaska
<input type="checkbox"/>	AL	Alabama
<input type="checkbox"/>	AR	Arkansas
<input type="checkbox"/>	AS	American Samoa
<input type="checkbox"/>	AZ	Arizona

Once the regions are defined they are immediately available as a report parameter on the Field QC Web Portal.