ELM Basic Functionality

Perform the basic tasks of the Enterprise Labor Model

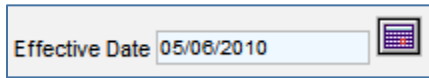## Contents

Versions

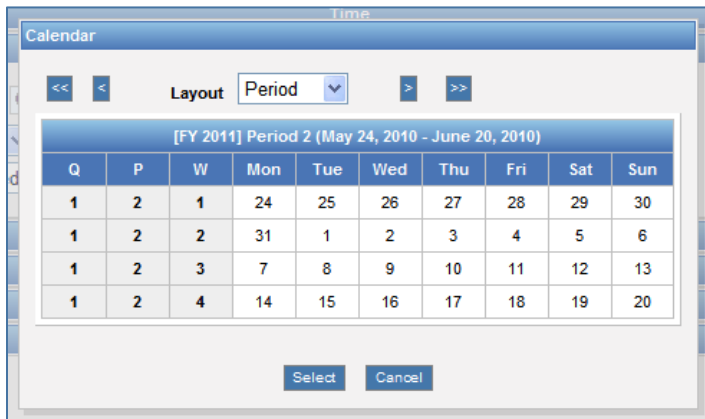1. Created. (6/25/2010)

Entering dates

Dates must be entered in many areas of ELM, and to do so there are two options: a) manual typing and b) selecting from a calendar:

To enter the date manually, clear the entry field and type the desired date in MM/DD/YYYY format. Other formats may return an error.

To choose a date from the calendar, click the calendar icon to the right of the date entry field. A calendar similar to the one below will appear:
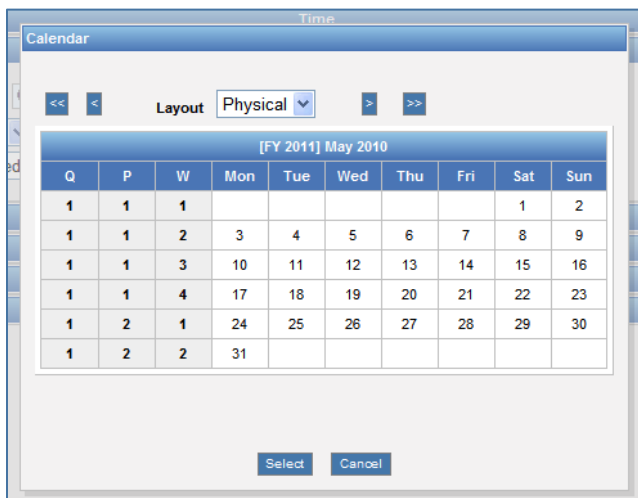

The default calendar view is based on your organization's fiscal calendar. Here, it shows a period and indicates the quarter, period, and week to the left of the days. To change the view to show the physical calendar, choose "physical" from the "Layout" dropdown list:

Now instead of showing a four-week period, the calendar shows the entire month, regardless of how many fiscal weeks or fiscal periods it includes.

In both calendar views, the functionality is the same:

- To select a date, click it and then click the "Select" button
    - Weeks, periods, and quarters cannot be selected—only dates
    - In some calendars, some dates may be gray—this indicates that they cannot be selected. Choose a date that is colored black instead.
- To return to the previous screen without selecting a date, click the "Cancel" button
- To move forward or backward one period or month, click the single arrow buttons (< and >)
- To move forward or backward one year, click the double arrow buttons (<< and >>)

Filtering and sorting

At the top of most data tables in ELM are filtering fields and sorting arrows:

These tools give the user many options for viewing the available data. Starting with the sorting capability, if we click the arrows in the "Report Type" column, the table sorts alphabetically on that column:

By clicking on the "Date Saved" column, the filter sorts chronologically:

Clicking "Date Saved" again reverses the order, to show the most recent saved item first:

Report Template ⬍	Report Type ⬍	Date Saved ▼	Saved by ⬍	Edit
Demo for Dan	Sales and Labor	4/26/2010 4:09 PM	logile	Edit
(DEMO) Bakery Checklist Scores (FY2009-Q4-P13-W1-D1 to FY2010-Q1-P2-W4-D7)	Checklist Scoring	3/30/2010 1:10 AM	logile	Edit
(DEMO) Daily Bakery Methods Review - Detail Responses (FY2009-Q4-P13)	Task Assignment Log	1/10/2010 1:25 AM	logile	Edit
(DEMO) Daily Bakery Methods Review - by Period (FY2009-Q4-P13,FY2010-Q1-P1,FY2010-Q1-P2)	Task Assignment Log	1/10/2010 1:24 AM	logile	Edit
(DEMO) Daily Bakery Methods Review - by Occurrence (FY2009-Q4-P13-W1-D1 to FY2010-Q1-P2-W4-D7)	Task Assignment Log	1/10/2010 1:21 AM	sled	Edit
(DEMO) Projected Sales and Hours - by Week (FY2009-Q3-P9-W1)	Sales and Labor	1/9/2010 5:09 PM	logile	Edit
(DEMO) Budget vs. Projection Sales by Department (FY2009-Q3-P9)	Sales and Labor	1/9/2010 4:50 PM	logile	Edit
(DEMO) Chain-Region-Zone Projection (FY2009-Q1-P1)	Sales and Labor	1/9/2010 4:43 PM	logile	Edit
(DEMO) Grocery Hours by Labor Category (FY2009-Q1-P1-W1)	Engineered Hours	1/9/2010 3:20 PM	logile	Edit

Filtering can be done in conjunction with or independently of sorting. It allows the user to view only those entries in the data table that begin with a certain series of characters. For example, to view only Sales and Labor Reports, we type the first few characters (say, "Sales") in the field below the "Report Type" header. After typing, click outside the field to refresh the page and show the filtered data:

Report Template ⬍	Report Type ⬍	Date Saved ▼	Saved by ⬍	Edit
	sales			
Demo for Dan	Sales and Labor	4/26/2010 4:09 PM	logile	Edit
(DEMO) Projected Sales and Hours - by Week (FY2009-Q3-P9-W1)	Sales and Labor	1/9/2010 5:09 PM	logile	Edit
(DEMO) Budget vs. Projection Sales by Department (FY2009-Q3-P9)	Sales and Labor	1/9/2010 4:50 PM	logile	Edit
(DEMO) Chain-Region-Zone Projection (FY2009-Q1-P1)	Sales and Labor	1/9/2010 4:43 PM	logile	Edit

To identify the Sales and Labor reports that have titles beginning with "(DEMO)," type it into the field under the "Report Template" header, and click outside the field:

Report Template ⬍	Report Type ⬍	Date Saved ▼	Saved by ⬍	Edit
(DEMO)	sales			
(DEMO) Projected Sales and Hours - by Week (FY2009-Q3-P9-W1)	Sales and Labor	1/9/2010 5:09 PM	logile	Edit
(DEMO) Budget vs. Projection Sales by Department (FY2009-Q3-P9)	Sales and Labor	1/9/2010 4:50 PM	logile	Edit
(DEMO) Chain-Region-Zone Projection (FY2009-Q1-P1)	Sales and Labor	1/9/2010 4:43 PM	logile	Edit

Multi-selectors

A wide variety of multi-selectors are used throughout ELM. These tools allow the user to make exactly the right selection.

A typical multi-selector is shown below:

This particular multi-selector is from the reporting module, but others behave similarly. The basic principles of using a multi-selector are:

- To make a selection, move the desired item from the left side to the right side
  - Either double click the item, or click it once and then click the ▶ Add button
- Start at the top and work your way down
- The selections you make at one level determine the available options at the next level

In the above multi-selector, we can see these principles in place. Let's take it one step at a time:

- Say we want to choose two periods: the 9th period of 2008 and the 1st period of 2010. First, we select the two fiscal years:

Fiscal Year	2007 2009 2010 2011 2012	▸▸ Add All ▸ Add ◂ Remo ◂◂ Remove All	2008

- Having chosen the fiscal years, the Quarter and Period fields on the left populate, showing all the quarters and periods for those two years:

Fiscal Year	2007 2009 2011 2012	▸▸ Add All ▸ Add ◂ Remove ◂◂ Remove All	2008 2010
Quarter	FY2008-Q1 FY2008-Q2 FY2008-Q3 FY2008-Q4 FY2010-Q1 FY2010-Q2 FY2010-Q3 FY2010-Q4	▸▸ Add All ▸ Add ◂ Remove ◂◂ Remove All	
Period	FY2008-Q1-P1 FY2008-Q1-P2 FY2008-Q1-P3 FY2008-Q2-P4 FY2008-Q2-P5 FY2008-Q2-P6 FY2008-Q3-P7	▸▸ Add All ▸ Add ◂ Remove ◂◂ Remove All	

- At this point we have two options: we can select the quarters (FY2008-Q3 and FY2010-Q1) in order to narrow down the options in the Period field to show only those periods. Or, we can skip that step and scroll through the Period field to find the periods we want.
    - o First option: since we know that Period 9 of is in Quarter 3 and Period 1 is in Quarter 1, we select FY2008-Q3 and FY2010-Q1:

Quarter	FY2008-Q1 FY2008-Q2 FY2008-Q4 FY2010-Q1 FY2010-Q2 FY2010-Q3 FY2010-Q4	▸▸ Add All ▸ Add ◂ Remo ◂◂ Remove All	FY2008-Q3

Now, the Period field updates and I can easily find the periods I want (FY2008-Q3-P9 and FY2010-Q1-P1):
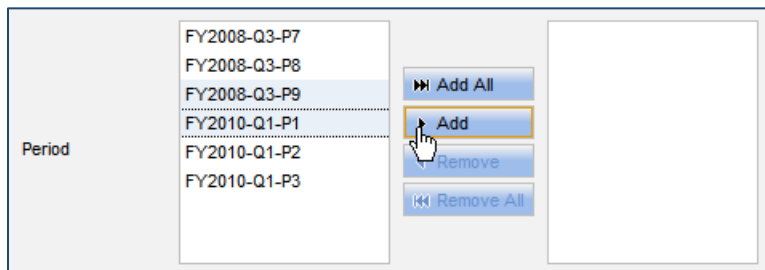
Note: see below for instructions on selecting multiple entries at once.

o Second option: scroll through the period field without first selecting the quarters, and add them to the right side:
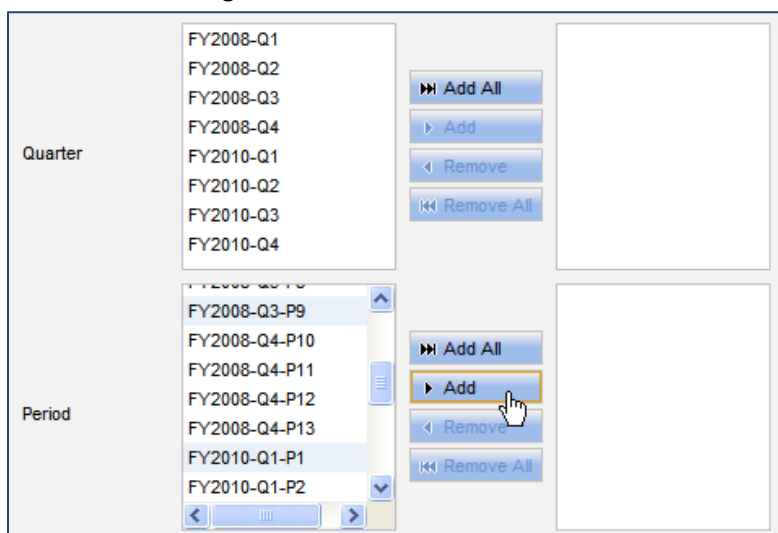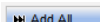
- The result is as follows in both cases; namely, the desired periods are selected:
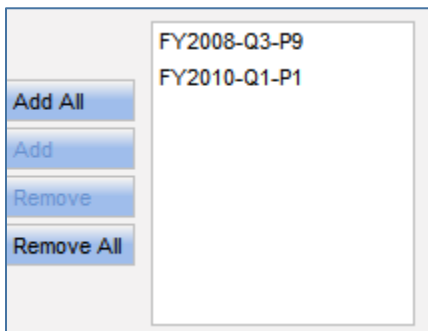
Additional tips

The following are a few more tips that make using the multi-selector faster:

- To select multiple entries at once (in order to move all of them at once), select the first one, then press and hold the CTRL key while clicking additional entries. Press the ▸ Add   or
  ◂ Remove   buttons to move all the selected entries at once.
- Click the ▸▸ Add All   or ◂◂ Remove All   buttons to move all the entries in a field to the other side.

- Selecting NO entries is equivalent to selecting ALL entries. That is, the following selections will give *exactly the same output:*

In both cases, the system will understand that you selected periods 1, 2, and 3 of FY 2008.

Viewing and exporting

Clicking gives a result something like the following (depending on the parameters selected):

Here there are a number of viewing options: collapsing rows and sorting by column, for example:

In addition there are numerous output options available. Each has its own unique icon:

From left to right:

- Print
- Export to Excel (.xls), with formatting

	A	B	C	D	E
1	**Sales and Labor Report**				
2					
3	Org: STORE 001				
4	Department: BAKI	Sub-Department: Multiple			
5	Time: Y2009-Q1-P1-W1				
6	Plan Type: Multipl	Sort by: None			
7	Data Filters: None				
8					
9	**Organization**	**Department**	**Plan Type**	**Time**	**TOTAL SALES**
10	STORE 001	BAKERY	Projection - Published	Y2009-Q1-P1-W1	$15,520.90
11			Budget - Published	Y2009-Q1-P1-W1	$8,579.55

- Export to Excel (.xls), without formatting

	A	B	C	D	E
1	**Sales and Labor Report**				
2					
3	Org: STORE 001				
4	Department: BAKERY	Sub-Department: Multiple			
5	Time: Y2009-Q1-P1-W1				
6	Plan Type: Multiple	Sort by: None			
7	Data Filters: None				
8					
9	Organization	Department	Plan Type	Time	TOTAL SALES
10	STORE 001	BAKERY	Projection - Published	Y2009-Q1-P1-W1	$15,520.90
11			Budget - Published	Y2009-Q1-P1-W1	$8,579.55

- Export to Excel (.xls), all decimals

	A	B	C	D	E
1	**Organization**	**Department**	**Plan Type**	**Time**	**TOTAL SALES**
2	STORE 001	BAKERY	Projection – Published	Y2009-Q1-P1-W1	15,520.9
3			Budget – Published	Y2009-Q1-P1-W1	8,579.55

- Export to PDF (.pdf)

Sales and Labor Report

Org: STORE 001
Sub-Department: Multiple
Plan Type: Multiple
Data Filters: None

Department: BAKERY
Time: Y2009-Q1-P1-W1
Sort by: None

Organization	Department	Plan Type	Time	TOTAL SALES
STORE 001	BAKERY	Budget - Published	Y2009-Q1-P1-W1	$8,579.55
		Projection - Published	Y2009-Q1-P1-W1	$15,520.90
	BAGEL SHOP	Budget - Published	Y2009-Q1-P1-W1	$1,071.80
		Projection - Published	Y2009-Q1-P1-W1	$2,983.40
	BAKERY	Budget - Published	Y2009-Q1-P1-W1	$7,507.75
		Projection - Published	Y2009-Q1-P1-W1	$12,537.50

- Export to comma separated values (.csv)

	A	B	C	D	E
1		Sales and Labor Report			
2		Org: STORE 001			
3		Department: BAKERY			
4		Sub-Department: Multiple			
5		Time: Y2009-Q1-P1-W1			
6		Plan Type: Multiple			
7		Sort by: None			
8		Data Filters: None			
9					
10		Departme	Plan Type	Time	TOTAL SALES
11	STORE 001	BAKERY	Projectior	Y2009-Q1-	$15,520.90
12	STORE 001	BAKERY	Budget - F	Y2009-Q1-	$8,579.55

Note: if exporting does not work, your browser settings may need to be adjusted. Be sure to make the website one of your "trusted sites."