Enterprise \ Prism Locations



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Overview

The Locations Overview page gives a breakdown of the defined sites in the Prism system. These allow a geographical view of where these sites are across the globe.



The top of the page displays the numbers of country groups, countries, regions and sites currently defined in the system. How these are defined is detailed in the following sections.

Below the summary tiles is a filter and map combination. The map shows any and all sites which match the criteria set in the filter and will zoom to display all of those sites.

Sites

Search

The search page shows a list of all existing sites configured in the system. From here you can filter the sites and select one to view or edit the <u>Detail</u> page. For grid controls see common features.

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	-	8 1	Filter										
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oote				Site Type	T	Sito Codo	т	Rogion	T	Country	т	Area Dial Codo	T
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			City Branch	Bronch		1242141		North		United Kingdom			
	4		dididid	Branch				London and South East		United Kingdom			
			Dr Green Thumb Dispencery	Shop		01		Monchester		United Kingdom		+441494	
			m	Branch				Derset		United Kingdom			
			Ono Central	Compus		677		South		United Kingdom			
ration			Poolo Hospital	Hospital		123463		London and South East		United Kingdom		61202	
			Sito A	Compus				Dorset		United Kingdom			
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			tost	Building				Dorset		United Kingdom			
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Create

Site creation is run through a process with six stages.

Stage 1 allows you to choose a country for the site, and within that to choose or define a region. Regions can be geographical or can reflect zones of business. An individual region is limited to a single country although several different countries can contain regions with the same name. At this stage you can also select, or define, the type of site you are creating. Several types are preconfigured, and a system administrator can add more to the selection in the <u>Settings</u> page. Finally, you must provide a site name and, optionally, a site code and dial code as well.

Sites Create					
- 1 Site Details	2 Location	Photo	4 Notes	5 Custom Fields	Completed
	Region				
	Country*		Time Zone*		
	United Kingdom		GMT Standard Time - (UT	"C+00:00) Dublir ▼	
	Region *				
	South West	• +			
	Details				
	Site Type*		Site Code		
	Headquarters	• +	TC01		
	Site*		Area Dial Code		
	Tiger Communications HQ	a	01425		

Stage 2 defines the specific location of the site. Here you can configure the address and place a map pin for the site. These details are all optional. To place the pin simply zoom the map to the correct position, click and drag to pan the map to the right area then click on the map to drop the site's pin.

S Create				
1 Site Details	2 Contine Photo	4 Notes	5 Custom Fields	Completed
	Address			a compressional
	Address Line 1	City		
	77-70 Christohurch Road	Ringwood		
	Addross Line 2	County		
		HAMPSHIRE		
	Address Line 3	Postcode		
		BH24 1DH		
	Arrienter Arrienter	And Statistics With Angeled With Statistics	boron Jacki Monu Christer Lus Servy	
	there we have a second	ble of Wight Sharikin Ventnor	Map contributors	
	50.843126	-1.786966		

Stage 3 allows for a picture upload to represent the site. Both a full picture and a thumbnail are generated from the selected picture file. Click the Browse button to find and upload a local image file. Click clear to remove the currently applied picture. The main image and thumbnail image both have zoom selectors (for larger pictures) and both can be dragged within their boxes to adjust the focus correctly.

Sites Create			
	2 Location Photo Photo	4 Notes Custom Fields	Completed
	Browse TIGER_250x125.png	Clear	
	Image	Thumbneil	
	61		
	< Previous	> Nox	

Stage 4 gives the option to enter notes for the site in rich text format. Links and pictures can be embedded in the notes field.

Sites Create					
1 Site Details	2 Location	Photo	4 Notes	Custom Fields	Completed
	Notes Paragraph • B I U Main office for the United Kingdom Primary telephone =44142589100		•		
	< Previous			> Noxt	

Stage 5 displays any configured custom site fields. These fields are defined by a system administrator in the <u>Settings</u> page and can contain any details not included in the standard site fields.

Sites Create					
Site Details	2 Location Custom Fields Opening and Closing Times 0900 - 1730 Employee Capacity 45 Site Manager Ben Nicklen	Photo	4 Notes	5 Custom Fields	Completed
	< Previous			> Next	

Stage 6 shows a summary of the information provided before finally creating the site record. At any stage before the final Submit button is pressed you can navigate back within the process to correct errors or change details.

Sites Create				
	2 Location	Photo Notes	5 Custom Fields	Completed
	Summary 1. Site Details Region Country United Kingdom Time Zone GMT Standard Time - (UTC+00:00) Dud	Rogion South West blin, Edinburgh, Lisbon, London	Expand All	
	Dotails Site Type Headquarters Site Tiger Communications HQ	Site Code TCOI Area Dial Code D1425		
	2. Location 3. Photo 4. Notos			
	5. Custom Fields < Previous		√ Submit	

Recycle Bin

The Recycle bin page looks very similar to the search page and has all of the same controls plus an additional one (1). This button will restore the deleted site.

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	7	Filter											
 Search Create 		Site	Ŧ	Site Type	Region	T Country	Ţ	City	Ţ	Postcode	T		
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Detail page

The detail page for a site displays all relevant information configured against the location. It includes defined name, type, code, and regional information (1), the address and map point (2), any notes and values entered against the bespoke fields that can be configured by a system administrator (3 and 4).

Sites Details - Tiger Communications			7)
8 Edit Photo		Details Location Custom Values Notes	Audit
	Details	0 2 3 4	5
(2)	Sito	Sito Codo	6
TIGER 💐	Tiger Communications	TCOI	
	Sito Typo	Aroa Dial Codo	
	Headquarters	+441425	
Tiger Communications	Region		
	Region		
	Country	Time Zone Code	
	United Kingdom	GMT Standard Time	
	Country Code	Timo Zono	
	GB	(UTC+00:00) Dublin, Edinburgh, Lisbon, London	
	Rogion		
	South West		
	Region Code		
	SW		

The 5^{th} tab (5) shows audit information including the creator and last modifier of the record, as well as the dates of creation and modification.

Each tab has an edit button (6) which allows the information on that tab to be modified. Once on the edit page there are thee further controls



Save changes (1) – submit changes and return to the details page

Reset changes (2) – discard any changes but stay in edit mode

Cancel (3) - discard any changes and return to the details page

Above the tabs on the page is the ellipsis icon (7). This contains the delete command. Once confirmed the site is deleted and moved into the Recycle Bin.

The site picture on the details page can be edited (8). Either a new image can be selected, or the existing one can be zoomed, panned or cleared as required.

Regions

Regions can be defined to represent an area of a country. A single country can have any number of regions, but each region must exist within a single country only.

A region has a name, which needs to be unique for the country it is linked to, and a code (optional and uniqueness is not enforced). ; for example both the United Kingdom and France could have regions defined with a name of "South" and region code "S" but a second region in either country could not have the name "South" as well.

As sites are created, they must be placed in a region to define them geographically. This means that you must have at least one region defined before sites can be created.

Manage

The management page shows all defined regions, showing the country they are in, the Country group (if one is defined) and the number of sites assigned to each region. For grid controls see common features.

ations	Regions	Manage						
	<	Filtor						(+
	Count	try T	Country Code	T Region	T Region Code	Country Group	Sites Count	
Manage		d Kingdom	GB	North	N	Europo	1	00
		d Kingdom	GB	South	s	Europo	2	00
		d Kingdom	GB	London and South Ea		Europo	4	00
		d Kingdom	GB	Woles	Woles	Europo	0	01
istration		d Kingdom	GB	Dorsot	Dorsot	Europo	5	01
	c	d Kingdom	GB	Manchester	Mn	Europe	1	00
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Creating a new entry, or editing an existing one, allows the Country (1), Region (2) and Region Code (3) to be selected, edited or defined. Once finished with the definition, click the tick to submit the change, or the cross to discard (4).

Countries

The countries page shows all countries by name and code, as well as showing to which country group (if any) they have been added, and how many regions have been defined per country.

Manage

The management page shows a list of countries. For grid controls see common features.

tos c oggions c ountrios c	♥ Filtor Country ▼					
	Country					
ountrios 🕓		Country Code	Country Group	Country Group Code	Regions Count	
	Afghanistan	AF ,	Asiq	ASI	0	0
Manage	Åland	AX	EMEA	EMEA	0	0
ountry Groups	Albania	AL	EMEA	EMEA	0	0
	Algeria	DZ	Africa	AFR	0	0
istration	American Samoa	AS	Oceania	OCE	0	0
ottings <	Andorro	AD	EMEA	EMEA	0	0
	Angola	AO	Africa	AFR	0	0
	Anguilla	Al	Caribbean	CAR	0	0
	Antarctica	AQ	Caribbean	CAR	0	0
	Antigua and Barbuda	AG	Caribbean	CAR	0	0
	Argentina	AR	South America	SAM	0	0
	Armonia	AM	Asia	ASI	0	0
	Aruba	AW	Caribboan	CAR	0	0
	H 4 1 2 3 4 5	**	*6.5	450	0	19

Editing a Country entry allows assignment to a different Country Group.

Country Groups

Country Groups allow Prism to treat defined sets of countries as single entities, for example Europe, Middle East and Africa as EMEA. This allows for simple top-level global reporting without needing complex filtering.

Manage

The Country Groups management page shows a list of the currently defined groups, each group can be expanded to show the countries allocated to it. No country can be in more than one Country Group. For grid controls see common features.

ations	Country Groups Manage			
	♀ Filtor			(+
	Country Group	▼ Country Group Code	T Countries	
	 Africa 	AFR	60 Manage	0
	► Asia	ASI	55 <u>Manago</u>	0
Manage	 Caribboan 	CAR	32 Managa	0
nistration	 Control America 	CAM	7 Managa	0
	▶ Europe	EUR	46 Manage	0
	 North America- 	NAM	6 Manage	0
	▶ Oceania	OCE	25 <u>Manage</u>	00
	 South America 	SAM	15 Manago	0
	► EMEA	EMEA	6 <u>Managa</u>	00
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Add or edit a Country Group

After clicking the add Group button you are presented with a blank row

Country Groups Manage				
♡ Filter				+
Country Group	Country Group Code	Countries	3	
• 1	2	null	√ ×	*

Enter the name of the Group (1), and a code (2) to refer to it then click the tick to create the entry, or the cross to discard it (3).

Editing an existing group works exactly like creating a new one, the Country Group name and code become editable and the tick or cross commit or discard the changes.

Country Selection

To add or remove countries from Country Groups click the Manage link in the Countries column.

Filter 1		
Country C	Country	
UG	Uganda	
UA	Ukraine	
Æ	United Arab Emirates 3	
GB	United Kingdom	
2 US	United States	
UY	Uruguay	
UZ	Uzbekistan	
VU	Vanuatu	
VA	Vatican City	

The country selection dialogue allows a filter (1) to speed up finding countries. To add or remove a country from the group tick or untick the box to the left. A country which is struck through (3) is already in a different Country Group, and therefore cannot be selected in the current one. Once you have made all the required changes, click confirm to return to the Manage page.

Administration - Settings

Sites

The Sites settings are only available to system administrators. There are two tabs available.

Site Types

Site types define what each site represents. Headquarters, offices, branches, data centres, anything can be configured to help represent a company's structure.

itions	Sites Settings				
tos	Site Types Custom Fields				
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ountrics	Site Types			$(\pm$	
ountry Groups	Site Type Name	т	Sites Count	т	
	Branch		5	00	
istration	Building		3	0	
ettings 🔗	Campus		3	0	
Sitos	Centre		0	0 🗊	
	Data Contro		0	0 1	
	Hoadquarters		0	0 🗊	
	Hospital		1	0 0	
	Location		0	0 🗊	
	Office		0	00	
	Outlet		0	0 1	
	Shop		1	00	
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The Site Types pages shows a list of currently configured entries and how many sites currently use them. New entries can be added with the plus button and existing ones can be edited or deleted with the controls on each row. A Site Type cannot be destroyed if sites are currently using it.

Custom Fields

Enabled Custom fields appear in the details page for every site.

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Locations		Sitos Sottings				
	c .	Site Types C	ustom Fields			
	<					
Countries	1 C	Custom Fields				Ø
	с.	Display order	Field name	Is visible	Updated By	Updated
		1	is a HUB		Matt Ringsell	01/06/2020 10:43:27
dministration		2	Has back office staff		Matt Ringsell	01/08/2020 10:43:27
	12	3	Has gateway installed		Matt Ringsell	01/08/2020 10:43:27
Sites		4	Field_Label_4	×		
		5	Field_Labol_5	×		
		6	Field_Label_6	×		
		7	Field_Label_7	×		
		8	Field_Label_8	×		
		Land Cooler Times	communications. All rights reserved.			0199

Here you can define which ones are available and visible to users, and what the label on those will be. Simply click the edit button to edit and define the fields.

Types	Custom Rolds	
ustor	n Fields	
	Please define and adjust the custom fields in the table below. Click at each cell to edit the values, use the visible' column to set the visibility of the fields.	the first cell to drag-drop the records to set the order and use the
	Field name	Is visiblo
×	Is a HUB	× 2
×	Has back office staff	
8	Has gatoway installed	4
	Field_Label_4	×
×	Field_Label_5	×
×		
	Field_Label_6	×
×		x

Click on the current label to edit it. You can reorder the fields by clicking and dragging the handle icon (1). The visibility of the field can be changed by ticking or unticking the "is Visible" box (2).