Chapter 1: Getting Started with the Manager's Desktop

Overview   This chapter introduces you to the Manager's Desktop. Security features, screen layout, and online help are discussed.

What's Covered?

Getting to Know the Manager's Desktop

The Advanced Store Manager's Desktop lets you access a complete system of server applications from a single integrated source. The Advanced Store server includes applications that automate many vital store functions, such as reports, managing security IDs, and checking prices and promotions. Manager's Desktop provides a starting place for the applications that perform these functions.

Manager's Desktop is a single source for these important tasks:

- Monitoring sales and performance objectives in real time.
- Running performance reports that focus on sales, associates, customers, or other key store elements.
- Data management.
- Price management.
- Associate management.
- Membership management.
- Tender management.
- System administration.

This chapter discusses the basic features of the Manager's Desktop:

- **Accessing the Manager's Desktop**—the Security Login provides access to the Manager's Desktop. The login has user security features such as Security Groups and both Direct and Network Connections, which this chapter defines and discusses in detail.

- **Using the Manager's Desktop**—this section includes a description of the basic layout of the Manager's Desktop, and discusses how to access and use options.

- **Manager's Desktop Online Help**—a support application to answer questions as you use the system.

Logging Into the Manager's Desktop

User Security

The Manager's Desktop is a web-based application that gives you access to the Advanced Store back office applications. Each time you launch the Manager's Desktop, you'll see the Security Login screen, as shown below.
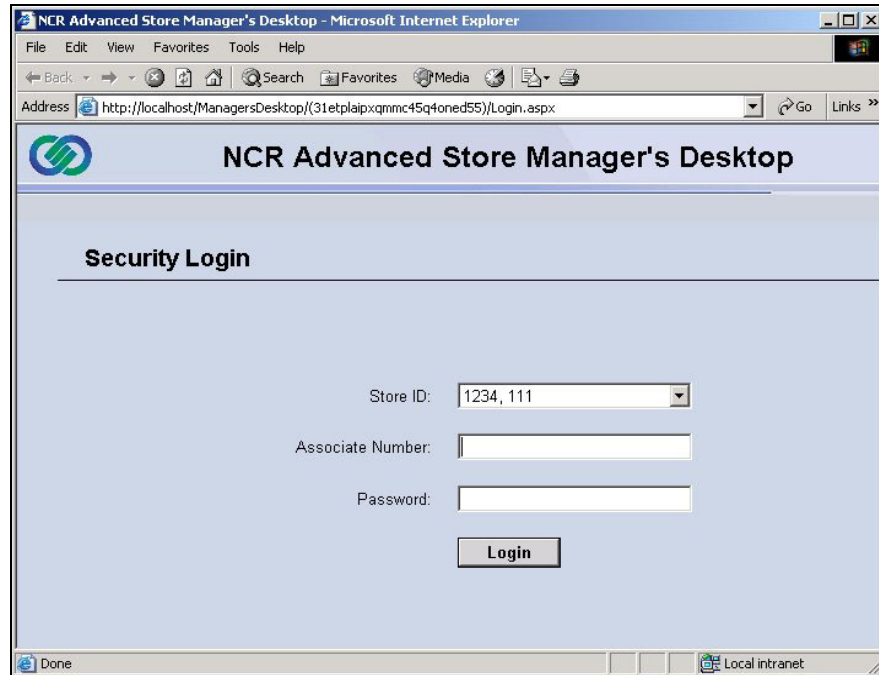

The Security Login screen acts as a gate that allows only approved users into the system. It also limits access to certain areas based on a user's security level.

To access the Manager's Desktop, you need an ID number, known as an Associate Number, and a password. Your ID and password determine your security clearance in the Manager's Desktop. If you have a manager-level or supervisor-level identification number, you will see more options than someone with an associate-level ID.

To perform a security login, follow the steps outlined below.

Enter ID and Password

1. At the Security Login screen, key in your **Associate Number**, **Tab** to the next prompt, and key in your **Password**. When you're sure the information is correct, click on the **Login** button, as show below.
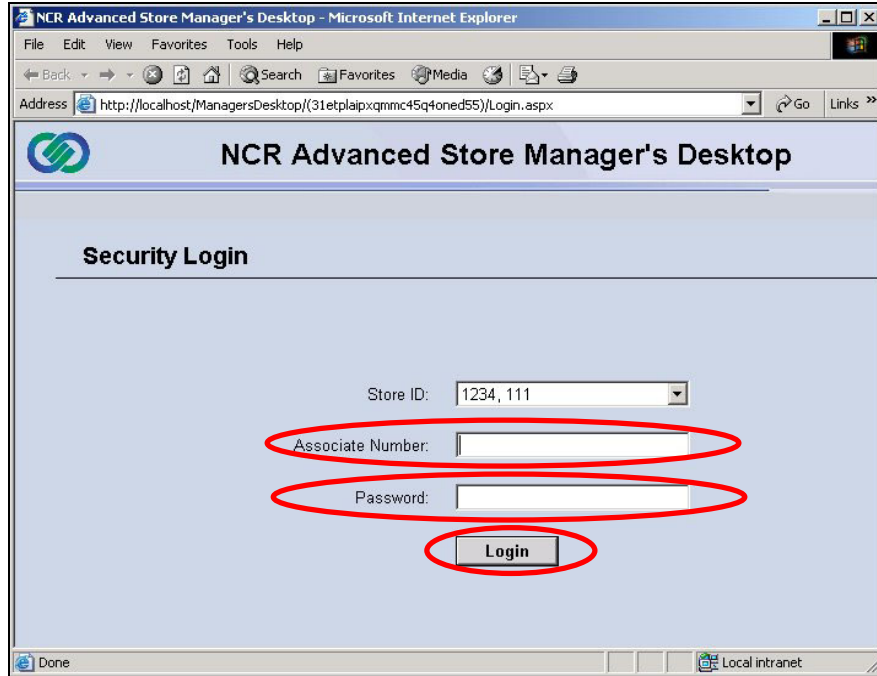
If you successfully log in, a screen appropriate to your security level displays. In the example below, someone logged in using a store manager ID, so the Store Dashboard displays.
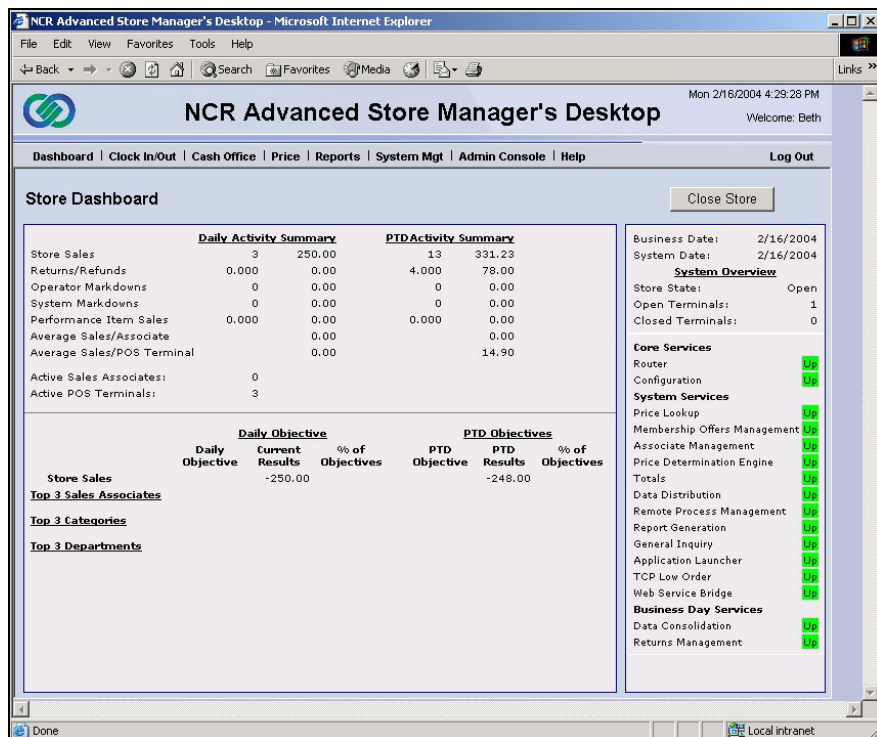
Security Groups

The Advanced Store Manager's Desktop classifies Associate IDs into eight security groups. Each group sees different options when logging into the system. The eight security groups are:

- **Store Managers**—this group needs data about a store's functions and sales performance.
- **Department Managers**—this group needs data about a department's functions and performance.
- **Cashiers**—most of this group's work is on the POS application, but this group may need to look up prices, perform open or close drawer counts, or clock in and out on the backoffice system.
- **Other**—this classification is currently inactive. People who try to log in using IDs from this group will have no access to the system. Instead, they will see an error message.
- **Terminated**—people in this group no longer work for the store. People who try to log in using IDs from this group will have no access to the system. Instead, they will see an error message.
- **Inactive**—people in this group may no longer work for the store, or they may be assigned to tasks that do not require access to the Advanced Store Manager's Desktop or Sales application. People who try to log in using IDs from this group will have no access to the system. Instead, they will see an error message.
- **Regional and District Managers**—this group needs an overview of the store's performance.
- **Store Support**—this group performs system administration functions.

Direct versus Network Connections

You will only see certain features of the Advanced Store Manager's Desktop if you log into the system at a workstation that is connected directly to the server. The server stores the data, parameters, and programs for the Advanced Store Manager's Desktop and Sales applications. Logging in at the server is called a "direct connection." The term "network connection" means you have launched the Manager's Desktop from a terminal that isn't directly connected to the server. For example, if someone launches the Manager's Desktop from a terminal at the service desk, that would be a network connection.

The charts below show the options available for each security group for both direct and network connections:

Store Managers

Option	Available with Direct Connection	Available with Network Connection
Dashboard	Yes	Yes
Clock In/Out	Yes	Yes
Cash Office	Yes	No
Price	Yes	Yes
Reports	Yes	Yes
System Management	Yes	No
Admin Console	Yes	No
Help	Yes	Yes

After login, the Dashboard screen displays.

Department Managers

Option	Available with Direct Connection	Available with Network Connection
Dashboard	Yes	Yes
Clock In/Out	Yes	Yes
Cash Office	No	No
Price	Yes	Yes
Reports	Yes	Yes
System Management	Yes	No
Admin Console	N o	No
Help	Yes	Yes

After login, the Dashboard screen displays.

Cashiers

Option	Available with Direct Connection	Available with Network Connection
Dashboard	No	No
Clock In/Out	Yes	Yes
Cash Office	Yes	No
Price	Yes	Yes
Reports	No	No
System Management	No	No
Admin Console	No	No
Help	Yes	Yes

After login, the Clock In/Out screen displays.

Other, Terminated, and Inactive

Option	Available with Direct Connection	Available with Network Connection
Dashboard	No	No
Clock In/Out	No	No
Cash Office	No	No
Price	No	No
Reports	No	No
System Management	No	No
Admin Console	No	No
Help	No	No

After login, an error message displays.

Regional and District Managers

Option	Available with Direct Connection	Available with Network Connection
Dashboard	No	No
Clock In/Out	No	No
Cash Office	No	No
Price	No	No
Reports	Yes	Yes
System Management	Yes	No
Admin Console	No	No
Help	Yes	Yes

After login, the Reports screen displays.

Store Support

Option	Available with Direct Connection	Available with Network Connection
Dashboard	No	No
Clock In/Out	No	No
Cash Office	No	No
Price	No	No
Reports	No	No
System Management	Yes	No
Admin Console	Yes	No
Help	Yes	Yes

After login, a screen with a blank display area displays.

Related Topics

- For more information on user security groups, see Managing Associate Information.

Using the Manager's Desktop

Although different security levels have different options in the Manager's Desktop, there are some similarities in the screen layouts. The example below shows the basic areas of the screen.

There are five main areas of the screen:
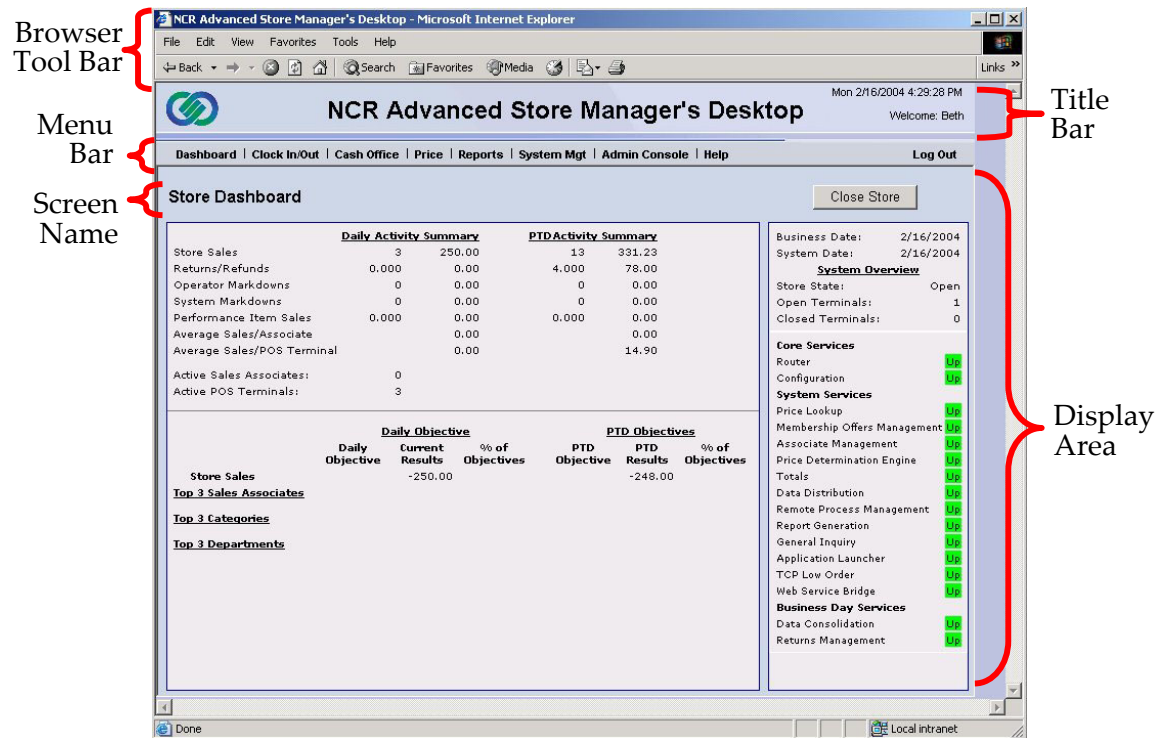
- **Browser Tool Bar**—all Manager's Desktop screens show a Microsoft® Internet Explorer browser tool bar at the top because Manager's Desktop is a web-based application.

- **Title Bar**—this area displays the full name of the application, NCR Advanced Store Manager's Desktop. The title bar also displays the name of the person logged in and the time the person logged in.

- **Menu Bar**—this bar displays the features available to the user. To choose an option, click on the name. One of three things will happen. A pull down menu will display, a new screen will display, or a new application will launch.

  In this example, a manager may choose **Dashboard, Clock In/Out**, **Cash Office**, **Price, Reports, System Mgt, Admin Console**, **Help**, or, at the extreme right side of the Menu Bar, **Log Out**. These are standard options for store managers when they launch the Manager's Desktop from a direct connection to the server.

People from other security groups may see fewer options, and a store manager will see fewer options when launching the Manager's Desktop from a network connection. For further information about the difference between network and direct connections, see the previous section of this document, "User Security."

- **Screen Name**—this displays the name of the currently active screen. In the example above, Store Dashboard is the current screen displayed.

- **Display Area**—this section of the screen displays prompts, options and information. In the example above, a manager can look at important store information or close the store.

Using Online Help

The **Help** option for the Advanced Store Manager's Desktop displays on the menu bar of every screen. The Manager's Desktop Help application follows the same format as standard Windows™ online help. You can get contextual help or you can look up a particular topic.

To launch Manager's Desktop Help, follow the steps below.

Click
Help

1. On any screen, click on **Help**, located on the menu bar, as shown below.
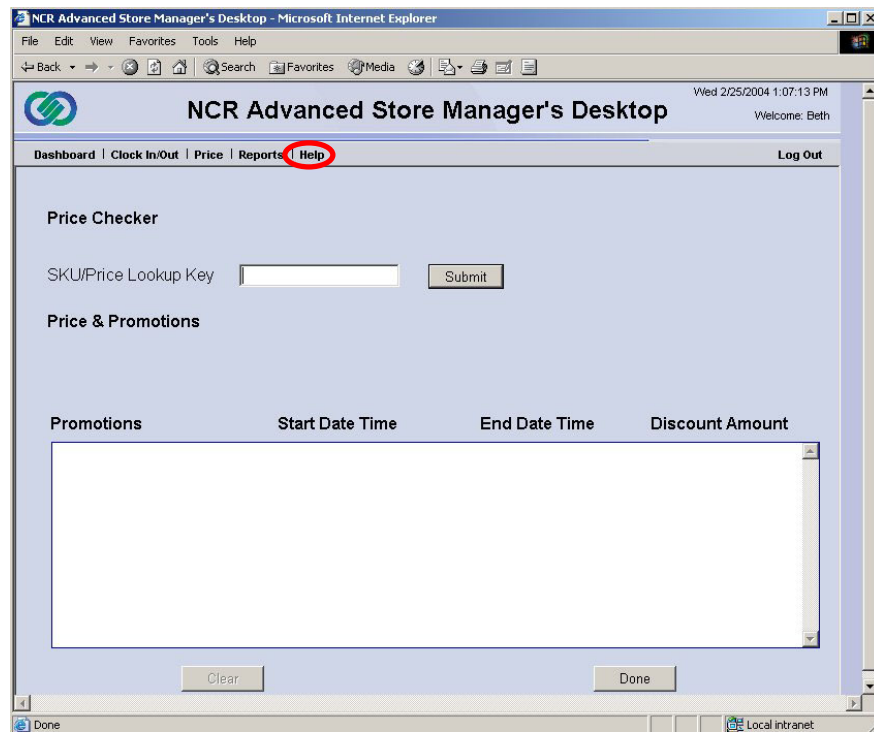
The Help application launches and displays on top of the Manager's Desktop.