My4DX Technical Manual

For Technical Support Professionals

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Contents

Introduction

My4DX is a network-based software tool designed to help teams implement *The 4 Disciplines of Execution*.

This technical manual is intended for system administrators and support personnel. It consists of four sections:

- **Application Interface:** A description of the various interfaces
- **Advanced Administration Tools:** A list of common issues experienced by users and their resolutions or answers
- **Site Update:** A description of the Excel Site Update workbook and functionality
- **Technical Support Issues:** A list of general tech support issues and resolutions

Some operations are available through multiple interfaces. Notations are made in this document for instances where one interface is preferable.

Requirements

Operating System (OS): Any operating system that can support an appropriate browser. Recommended OS: Windows 7+, Mac OS X v10.6+ (Snow Leopard)

Browser: HTML5-capable browser

Browsers that are currently supported are:

Browser	Version
Internet Explorer	7.0+ (9.0+ for some admin functions)
Chrome	20+
Safari	4+
Firefox	3.5+

Although other browsers that support HTML5 may work, they are not formally supported at this time.

Additional Software: Adobe Reader 8+, Microsoft Excel (or other software that can open .xlsx files)

Networking: Access to the Internet is required, and a connection must be maintained throughout the My4DX session. There is no offline mode.

Hardware: The minimum hardware requirements to access My4DX vary based on which OS and browser are used. Any hardware that adequately supports the OS and browser can be used.

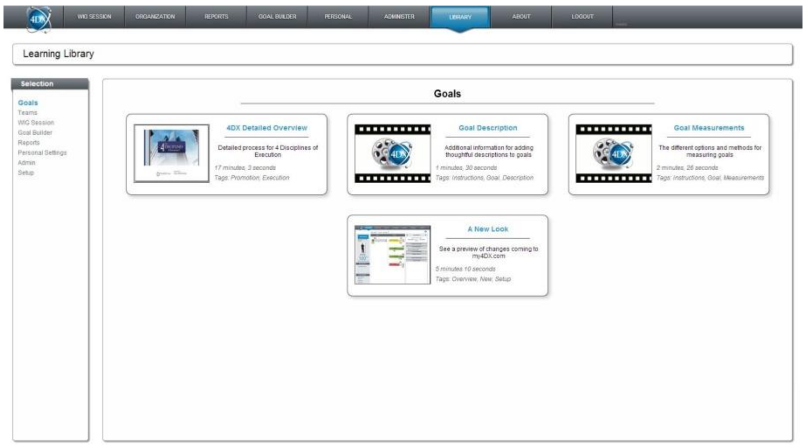
Permissions

User access restrictions vary according to role. Users should be granted appropriate permissions based on their function. Permissions are handled differently in each organization, but in general, Technical Support and the Internal My4DX Expert (IME) will have access to features not available to team members and others. In particular, the Advanced Administration Interface will be available to only the IME and Technical Support roles.

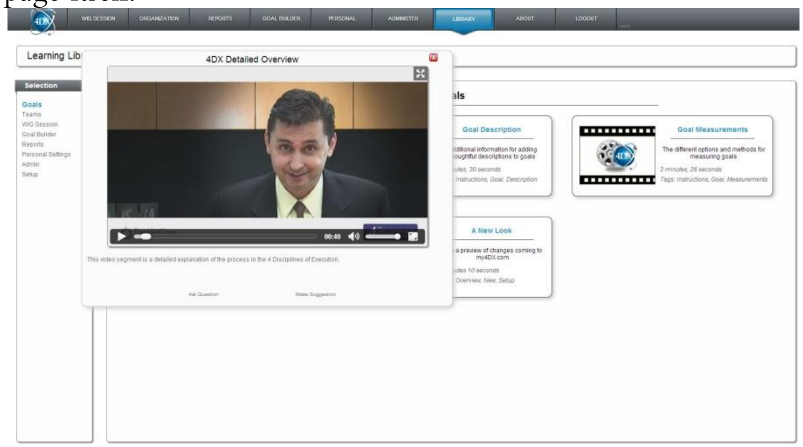
Additional Documentation

My4DX comes with the following support manual, quick reference guides, and how-to videos:

1. **My4DX User Guide:** To obtain a copy of the most recent User Guide, go to the LIBRARY tab in the top menu bar on My4DX.
2. **My4DX Quick Reference Guides:** Quick reference guides are available for the following topics:
   - WIG Session
   - Changing WIGs and Leads
   - Changing Teams
   - Commitments
   - User Reports
3. **How-To Videos:** To access the how-to videos and other updated information, go to the LIBRARY tab in the top menu bar on My4DX.



Videos will open and auto-start in an overlay window within the page itself.



Videos are available for the following topics:

- Goals
- Teams
- WIG Session
- Goal Builder
- Reports
- Personal Settings
- Admin
- Setup

New videos are added regularly.

Implementation and Maintenance

Initial Setup: Initial setup is assisted by FranklinCovey implementation specialists.

Files: No files for system functionality are stored on the local client machine. Reports that can be exported from My4DX into local Excel files are discussed in the appropriate application interface sections of this document.

Security: All data transfers and communications with My4DX are encrypted.

Application Interface

1: My4DX Login Page

The Login page is the default page for the My4DX application interface. In addition, the "Logout" tabs in both main interfaces (see sections 2.9 in the Application Interface section and 2.8 in the Advanced Administration Tools section), return the user to the Login page.

LOGIN

The My4DX Login page is shown below.

Note

Security questions and answers are assigned by clicking on the PERSONAL tab while logged in. See section 2.5 in the Application Interface section.

Checking the "Remember me" checkbox repopulates the "Username" field on subsequent logins.

The "Forgot your password?" link replaces the login frame with a "Password Recovery" frame, as shown at left. The "Request Security Question" button retrieves the user's security question. The recovered password will be emailed to the email address associated with the user's account.

The Login page also contains links to:

- Software updates
- Upcoming events
- View demo

The "Go" button in any of these sections links to the corresponding page. Each of these pages contains navigation links to switch to the other sections or to return to the Login page.

2: My4DX Application Interface

The application interface is the main workspace of My4DX. The main interface for My4DX consists of nine tabs arranged in a menu across the top of the main screen. The nine tabs are:

Note

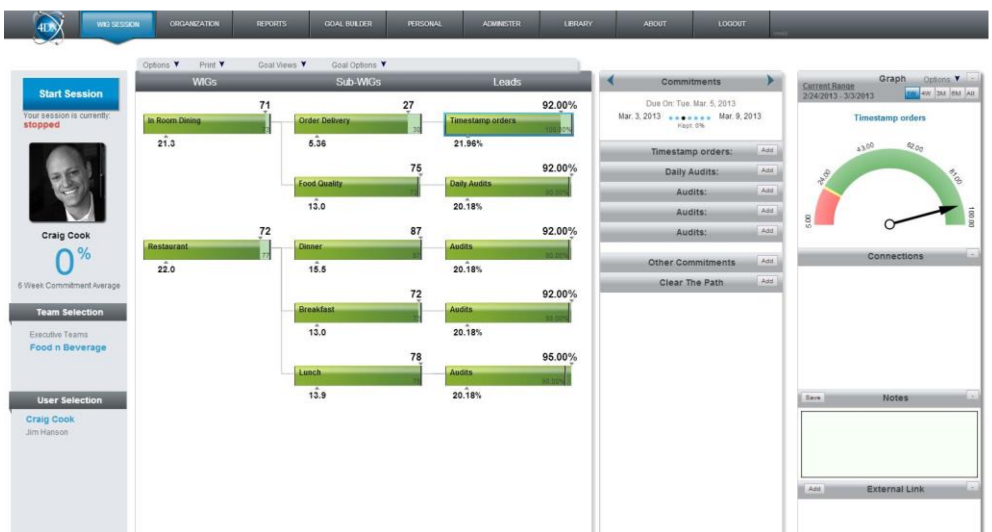
Some tabs and menu items are visible only to users with certain permission levels.

- WIG SESSION
- ORGANIZATION
- REPORTS
- GOAL BUILDER
- PERSONAL
- ADMINISTER
- LIBRARY
- ABOUT
- LOGOUT

The following sections contain descriptions of each tab.

2.1: WIG SESSION

The WIG SESSION page is the default page after login and can be considered the central page of the My4DX interface. When a user first logs in to My4DX, the application goes directly to the WIG SESSION page. The column at the far left of the screen is for leading or joining a WIG Session.



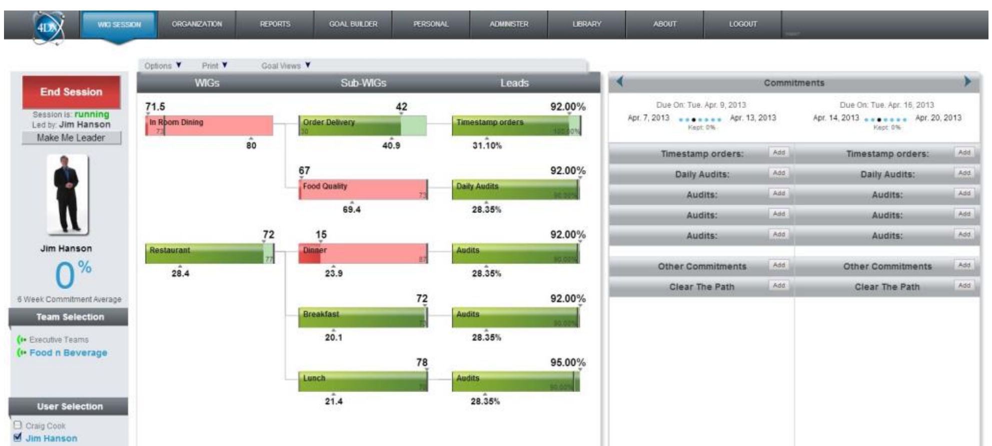
2.1.1: Session Status

- Underneath the user's photo and percentage is the "Team Selection" area that lists all of the teams the user belongs to.
- Selecting a certain team turns the team name blue.
- In the "User Selection" area, users select their name from the list of team members. The user's name is then highlighted in blue.
- The button at the top of the column allows users to start a session or join a session if one is already in progress.

When a session is in progress, the following changes occur:

> **Note**
> Team members can't join a WIG Session until the team leader has started the meeting.

- This icon  appears next to the name of the team.
- Checkmarks appear next to the names of users who have joined a meeting.
- The "Start Session" button changes to "End Session" for the team leader and "Leave Session" for other session participants.
- The session status becomes "running."
- A "Make Me Leader" button appears directly above the user's photo. If it is necessary to change the session leader during a session, a user can click on the "Make Me Leader" button.

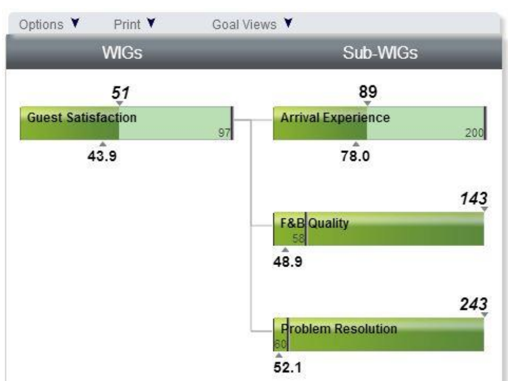


2.1.2: Goals (WIGs, Sub-WIGs, and Leads)

The area just to the right of the gray session information column lists the goals for the selected team.

Once a user is logged in and has selected their team and name, goals are visible in the “Goals” panel.

WIGs are listed on the left side with sub-WIGs and Lead measures linked to them on the right.



Note

Hovering the mouse over a goal prompts a pop-up window with the name of the goal, description, and when it was last updated.

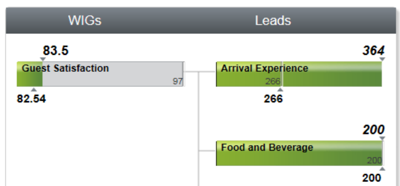
Every goal has the same basic information:

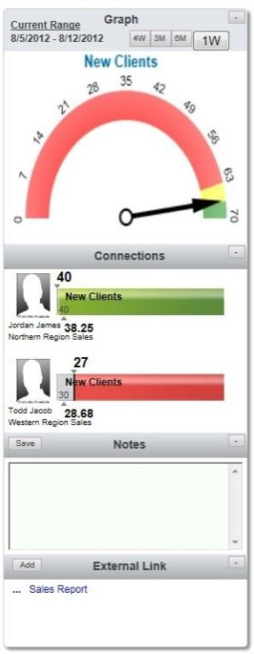
- Name of the goal
- Current value of the goal
- Current target of the goal
- End target of the goal

The goal progress indicator bar has the following color cues:

- Green = On or ahead of target
- Yellow = Slightly behind target
- Red = Significantly off target

Users can update the current value of any goals tasked to them in this area on the screen by clicking on the current value and changing the value in the prompted textbox.





Users can select any goal in the "Goals" panel. The goal detail panel at the far right contains graphs and detailed information about a selected goal's performance. The goal detail panel (shown at left) contains collapsible sections for:

- **Graph:** A date range can be selected in the top of the "Graph" section to populate the graph. For example, the graph shown at left has a date range of "1W" or 1 week. For any range longer than 1 week, progress is shown on a bar or line graph. (A bar or line graph display is selected from the "Options" menu directly above the date range selection buttons.)
- **Connections:** For many goals, the "Connections" section is blank. This section contains data only if the goal selected is affected by goals on other teams. The user can't manipulate data in this section.
- **Notes:** This area contains a single text box used for notes. Saving the notes results in a confirmation dialog box with a "Save Complete" notification. Not everyone can use and access notes. If a user needs to access this section and cannot, he or she should contact an IME.
- **External Link:** The "External Link" section is used to add the URL of a website or document related to the goal. Clicking the "Add" button displays text boxes for the name and URL link.

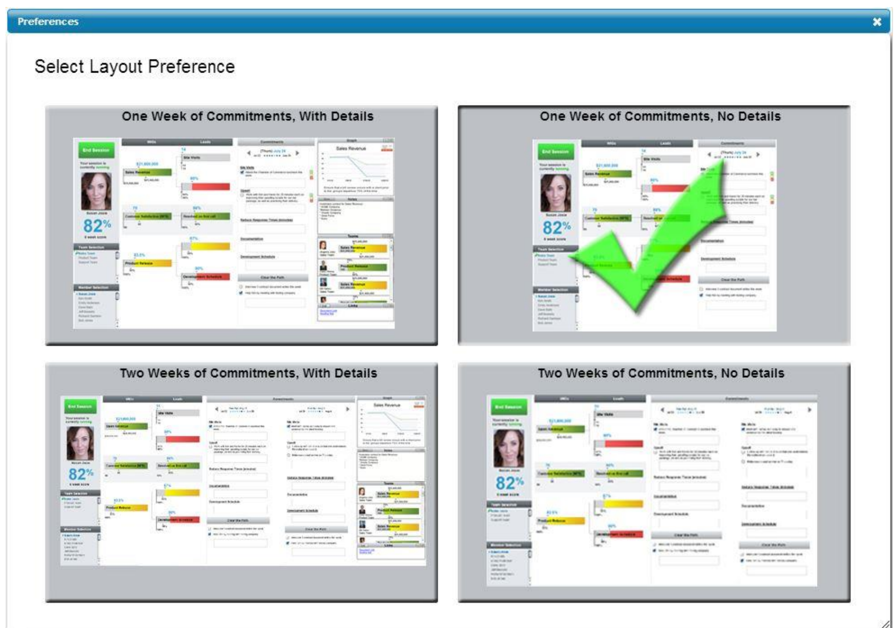
On the WIG SESSION page, immediately above the WIGs, are the following drop-down menus:

- Options
- Print
- Goal View
- Goal Options (not always available)

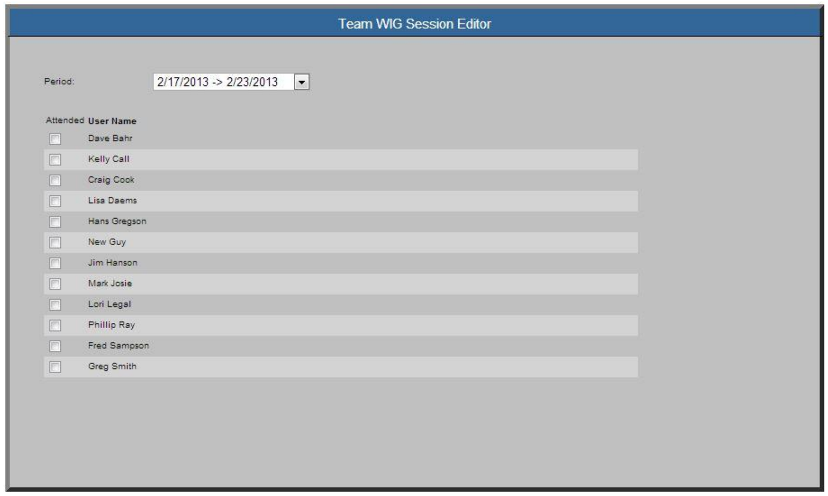
Options

The “Options” menu has the following choices:

- **Preferences:** Determines display layout (see below)

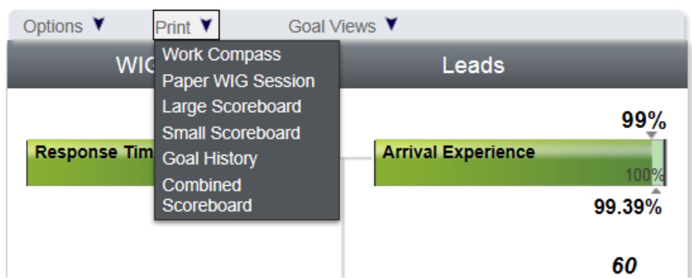


- **Invite Others:** May not be available, based on user’s permissions
- **Edit Session Day:** Sets the day of the week when WIG Sessions are scheduled
- **Edit Team:** May not be available, based on user’s permissions
- **Day Job Commitments:** Provides for the entry of other commitments not related to My4DX (These commitments are not counted in scores or reports.)
- **Edit Session History:** Opens the Team WIG Session Editor (see below) For each selected date range, this feature displays who attended the WIG Session. If no team members are checked, the system assumes a WIG Session was not held.



Print

The “Print” menu is designed to create paper copies of the following items:



- **Work Compass:** A list of commitments for the week formatted for printing (paper size is fixed)
- **Paper WIG Session:** A summary of the WIG Session showing each team member’s goals and commitments for the week (This tool is helpful for teams that don’t have access to a personal computer or projector display, so they use a hard copy for their WIG Session. Paper size, paper orientation, and content options—such as including retired goals and sub-teams—are available in the dialog box.)
- **Large Scoreboard:** A scoreboard showing overall goals and progress. (Paper size, paper orientation, and content options—such as including sub-teams—are available in the dialog box or by clicking the “Options” button.)
- **Small Scoreboard:** A scoreboard showing WIGs-Lead combinations on one page. (Paper size, paper orientation, and content options—such as including sub-teams—are available in the dialog box or by clicking the “Options” button.)

- **Goal History:** A graph or bar chart for each goal showing its progress over a selected time period. (Paper size, paper orientation, and content options—such as the time period—are available in the dialog box. The "Options" button allows users to include sub-teams, display as a bar or line chart, and display future projections. The "Export to Spreadsheet" button exports the raw data to a spreadsheet.)
- **Combined Scoreboard:** A scoreboard that combines the look and functionality of the "Goal History Report" and the "Large Scoreboard." It has the same options as "Goal History."

Goal View

The "Goal View" menu has a single checkbox to select whether or not to show retired goals.

Goal Options

Note

"Goal Options" are available only to users with permissions to access Goal Options and only appears if a sub-WIG or Lead is selected.

The "Goal Options" menu has the following selections:

- **Edit**: Opens the Goal Editor page, which has the following tabs: (Refer to section 2.4: GOAL BUILDER in the Application Interface section for a full description of these tabs.)
  - **Display:** Sets the name and description for a selected goal
  - **Options:** Sets the tracking units (number, money, or percent), boundary conditions, goal type, tolerance, and culture values
  - **Values:** Allows user to set the current goal value
  - **Visibility Dates:** Sets goal "Available" and "Retire" dates
  - **X to Y:** Allows addition of waypoints using either the "Add" button or the "Waypoint Generator."
  - **Connections:** Shows the connections for the current goal (Connections can be removed by clicking on the red "X" to the left of the connection.)
- **Retire**: Retires the goal
- **Delete**: Deletes the goal

2.1.3: Commitments

The third section of the WIG SESSION page allows users to enter and track weekly commitments. All Lead measures in this section count toward the “Commitments Made” and “Commitments Kept” scores.

- The forward and back arrow buttons at the top right and left of the “Commitments” box scroll between weeks to see past and future commitments.
- The “Due On” date is the reporting day for a particular commitment.
- The checkbox next to the commitment marks it as complete.
- Clicking on the commitment opens a text box where the commitment can be edited. Commitments can be edited for the current week, 1 week past, or 2 weeks forward.
- The commitment can be moved to the next week with the “Copy Forward” button, or removed with the “Delete” button.
- Commitments older than 2 weeks cannot be added, edited, or checked complete.

Note

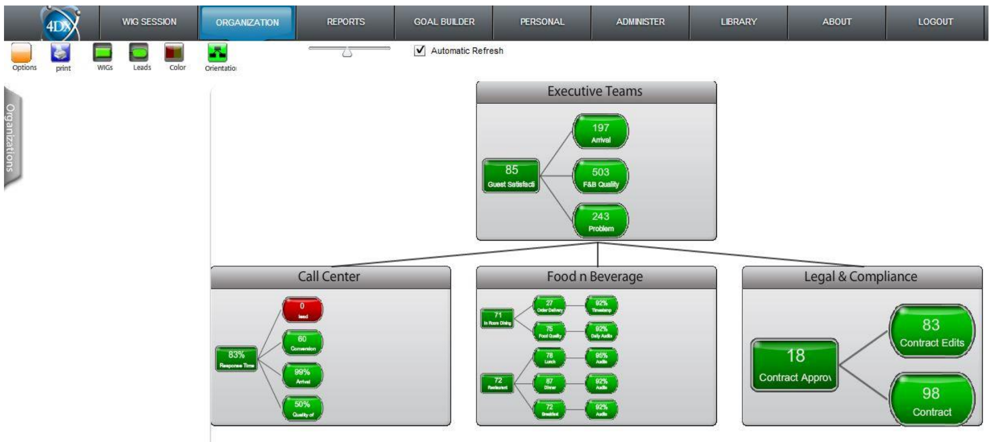
Commitments can be forwarded using the “Copy Forward” button to keep them current.

Entering a new commitment:

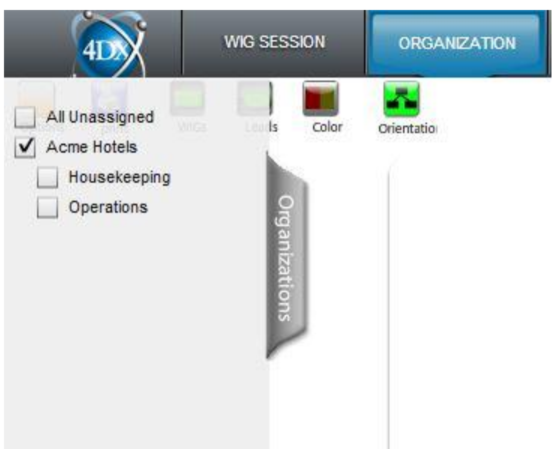
- The “Add” button next to the desired Lead measure creates a new commitment. Up to four commitments can be entered for each lead measure. After saving, the commitment appears under the corresponding goal.
- If a commitment doesn’t fit with any particular Lead measure, it can be entered in the “Other Commitments” section. (Note that “Other Commitments” is also the area for displaying commitments that were attached to Lead measures that have been deleted.)

2.2: ORGANIZATION

The ORGANIZATION tab offers a dramatic view of the organizations, teams, goals, and progress.



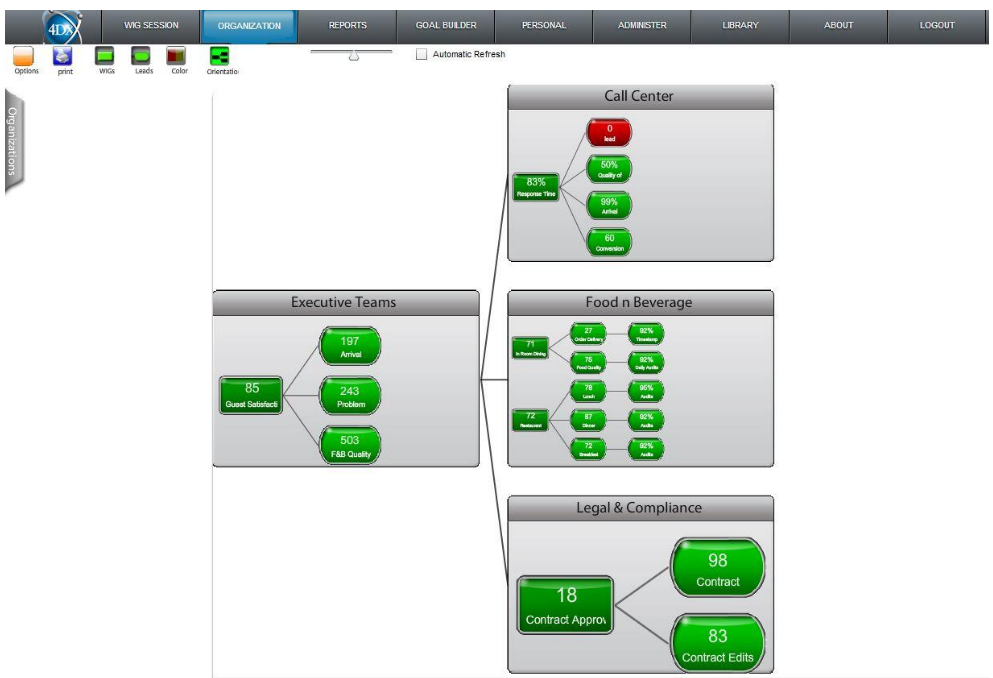
The first control required for operation of the ORGANIZATION tab is the "Organizations" pullout tab on the left margin near the top of the screen. Clicking on the tab will open the "Organizations" selection bar.



Once a desired organization has been selected, clicking on the "Organizations" tab will close the selection bar and update the screen.

Several buttons in the upper left corner of the screen affect the ORGANIZATION screen display. The "WIGs" button turns on and off the display of WIGs and their progress. Similarly, the "Leads" button adds or removes the Leads. The "Color" button replaces the WIGs/Leads display with a colored block denoting progress (green, yellow, or red).

The "Orientation" button changes the orientation of the layout from vertical to horizontal, as shown below:



To the right of the "Orientation" button is a scale slider that scales the onscreen teams.

Finally, the "Automatic Refresh" checkbox turns on automatic refresh.

2.3: REPORTS

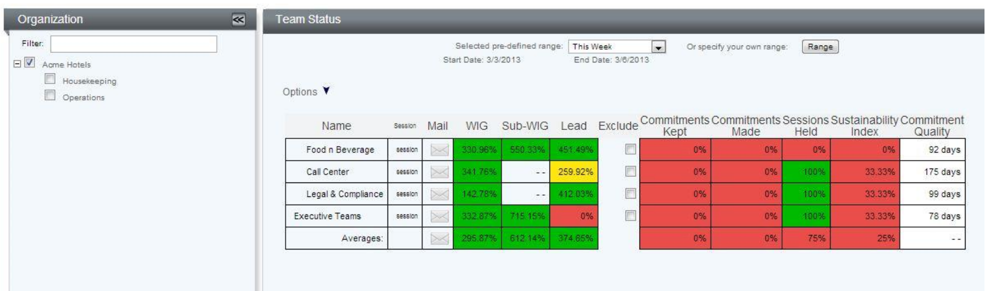
The REPORTS tab contains the following menu choices, which are available from the pop-up menu that appears by hovering the mouse pointer over the REPORTS tab:

- Team Compare
- Team Status
- User Reports
- Executive Scoreboard
- Analysis Report

2.3.1: Team Compare

The Team Compare report is the default view if the REPORTS tab is clicked directly without making a choice from the pop-up menu.

2.3.2: Team Status



The left section of the Team Status report is the "Organization" panel. It is used to select the Organizational Unit (OU) for which the report is generated. The "<<" button in the upper right corner of the "Organization" panel minimizes the column to provide more room on screen for the "Team Status" panel. When the column is minimized, the ">>" button appears in the upper right corner. Clicking this button restores the "Organization" panel.

When an organization is checked, the "Team Status" panel automatically updates on the right. While updating, green progress bars in the "Team Status" title bar (for overall progress) and within the "Team Status" section (for "Loading team information" and "Loading commitments for teams") indicate the progress of the update.

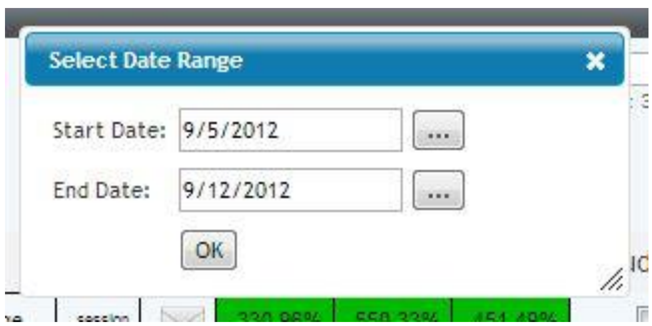
Note

To see the "Options" menu, click on the word "Options." Hovering the mouse pointer does not expand the menu.

The "Options" menu in the "Team Status" section contains the following selections:

- **Export Table to Excel:** Creates an "exportTeamStatus.xlsx" file containing the information showing in the "Team Status" section
- **Export Commitments to Excel:** Exports an "exportTeamsCommitments.xlsx" file listing the team, date, person, completion status, and commitment
- **Print Table:** Opens the local machine's print dialog box to print a copy of the table
- **Show/Hide Details:** Shows or hides all the individual WIGs and sub-WIGs that comprise each row in the table

A drop-down box in the top center of the "Team Status" section allows users to select several pre-defined ranges: This Week, Last Week, Last 4 Weeks, Last 3 Months, or Range. Selecting Range (or clicking on the "Range" button to the right of the drop-down menu) opens the "Select Date Range" dialog box, where users select an arbitrary date range, as shown below.

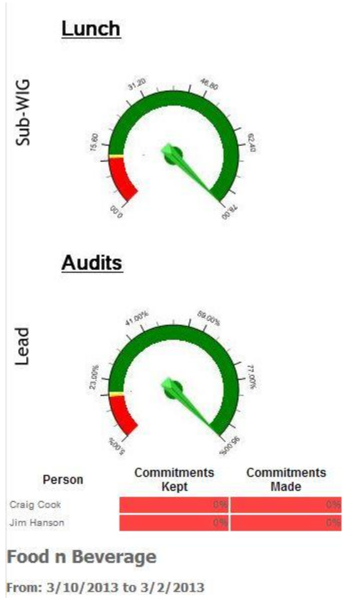


Clicking the button next to either the "Start Date" or the "End Date" brings up a calendar, as shown at left. Alternatively, dates can be entered directly into the date fields using the format mm/dd/yyyy.

Clicking on the "Name" column in any row opens a new window with team status details that includes indicators for each WIG, sub-WIG, and Lead. It also includes commitment results.

Note

Needle dials are shown for 1 week of data. If the range is set for greater than 1 week, line graphs replace the needle dials.



Clicking on the “Session” column opens the appropriate WIG Session for that team.

Clicking on any WIG, sub-WIG, or Lead value in the table opens a corresponding “Details” dialog box, as shown below.

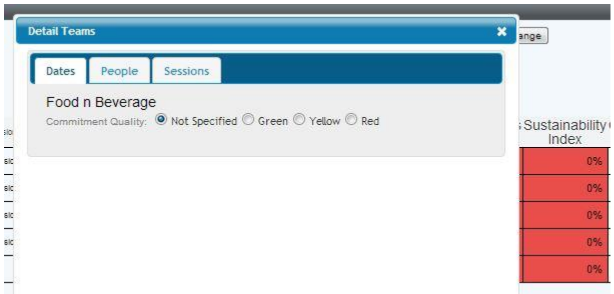
Note

The “Commitment Quality” column is available only to certain administrators, coaches, and champions. It allows a coach or champion to rate the level or quality of commitments by the individual team members over a 30-day period based on the SAT (Specific-Aligned-Timely) formula.

The dialog box is closed by clicking on the “X” in the upper right corner.

Clicking on the checkbox in the “Exclude” column of any row excludes commitments from that row. Commitments then display in gray instead of red, and the team commitment scores are removed from the overall average at the bottom of the table.

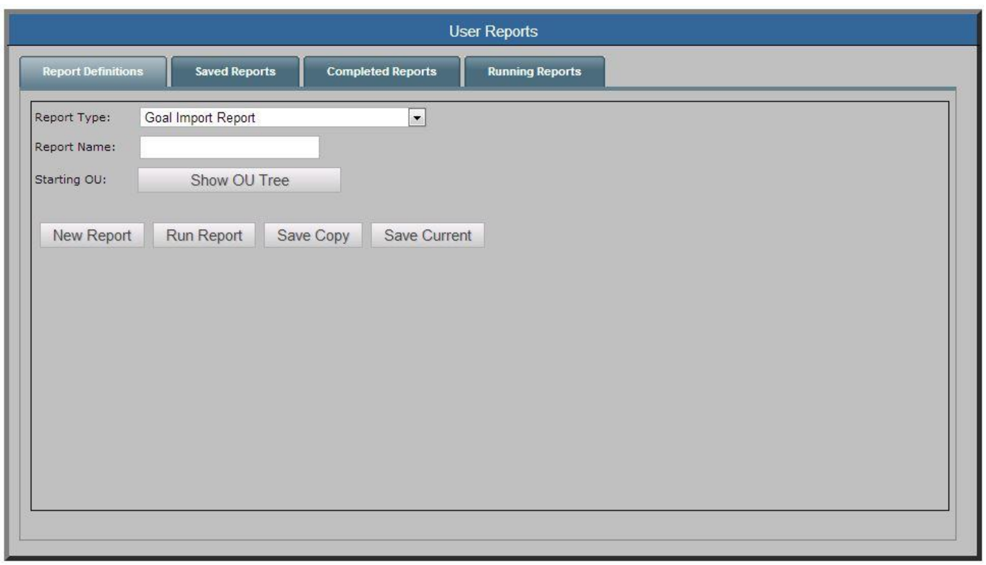
Clicking on any value in the commitments columns opens the “Detail Teams” dialog box, as shown below.



The "Detail Teams" dialog box includes the following tabs:

- **Dates:** Organizes data according to date, and allows specification of the commitment quality as green, yellow, red, or not specified
- **People:** Organizes data according to team member
- **Sessions:** Shows whether the team has held WIG Sessions for the date ranges selected

2.3.3: User Reports



"User Reports" has four tabs:

- Report Definitions
- Saved Reports
- Completed Reports
- Running Reports

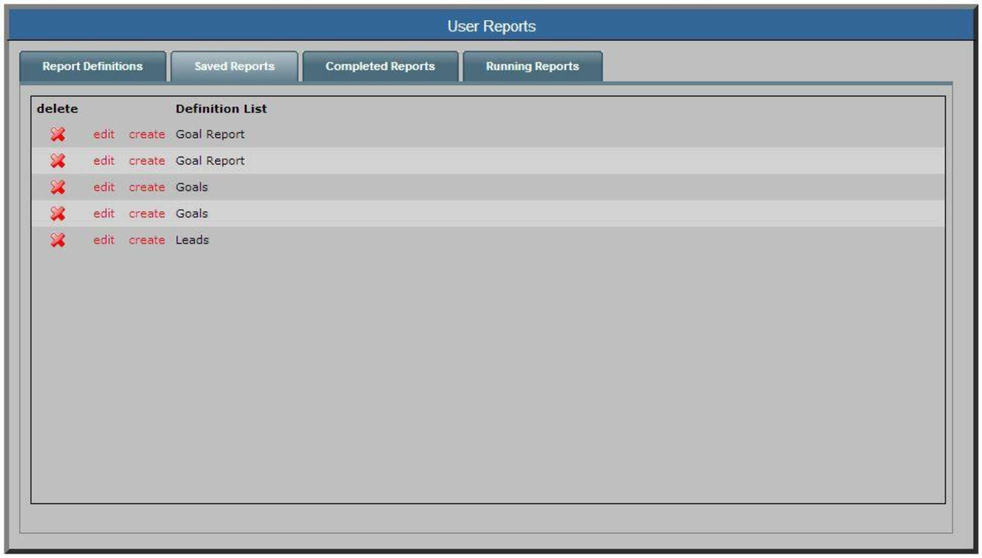
The "Report Definitions" tab allows users to create a large number of OU reports, including the following:

- **Goal Import Report**: Normally used in the initial creation of a company site or when a company is updating all of its team goals. A spreadsheet is created that shows each team and OU in the company with blank space to enter the data for new goals (e.g., name, description, X & Y values, etc.). The spreadsheet can then be uploaded to create all of the goals at once. This report is mostly superseded by new functionality. Please contact technical support for more training.
- **Goal Status Report**: Creates a spreadsheet that shows the current values for the goals on the teams selected, including the OU, team name, goal name, goal description, start value/date, end value/date, current value and date of last time the current value was changed, current target and date of the last time the current target was changed, percentage of completion compared to current target, and percentage of completion compared to end target. (It is unlikely users will need to use the external OU, top teams only, leaf node only, or fill in all cells designators.)
- **Goal Update Report**: Similar to the Goal Import Report except this report populates data for the goals currently listed on those teams and any waypoints they have loaded.
- **Goal Update Value Report**: Used with a tool the developers created called the "Goal Updater," which allows users to update in a specific spreadsheet the current value for goals. This report creates the spreadsheet that is used with the tool. Most companies do not use this tool as they prefer that users update their goal values manually. To use this report, users need the tool and some additional training. Please contact technical support for more information.
- **Goal History Report**: A spreadsheet that shows the current value and target value recorded each week for the date range and teams selected. Users can also specify a particular goal name or goal type to include. When entering the goal name, users must type it exactly as it appears in the system. For example, if a user types the goal as "Sales Revenue," but the goal name in the system is "Sales Revenue Total," then the system will not find the correct goal.
- **OU Execution Rollup Report**: Generally only used by companies that have a large number of OUs. The spreadsheet sums up the commitments made and completed and the WIG Session scores according to OUs and their sub-teams.

- **OU Team Commitment Report**: Creates a spreadsheet that shows all commitments listed by OU and team for a particular date range. Also shows who made the commitment, what lead measure or category it was entered under, the date it was entered, and whether or not it was completed.
- **OU Team External ID and Start Date Report**: External IDs are not used by most companies so this part of the report will likely be blank. The report shows a start date if one was assigned to that OU.
- **OU Team Membership User Info Report**: Shows the members of each team and the last time they logged in, listed by OU and team name. An option to show the date of the last commitment entered by that user is also available. Options to show the external ID and Single Sign On (SSO) are not used by most companies.
- **OU Top Team Goal Report**: Shows the top-level teams (highest in the organizational hierarchy) for each OU and the name of the selected goals for those teams.
- **OU User Report**: Lists each user's login and name for each OU.
- **User Inactivity Report**: Shows a list of users who have not logged in since a selected date. Data includes the login, name, date of last login, date account was created, and the user type. The SSO option is not used by most companies. An option to exclude users who have entered commitments since the cut-off date is also available.
- **User Report**: Lists every account for the company. Includes login, name, user type, date of last login, date of last access, and date of account creation.

Options can be selected for each report type. Options appear below the "Report Type" drop-down list when its contents are changed. For any report, users can select one of four buttons at the bottom of the screen: "New Report," "Run Report," "Save Copy," and "Save Current."

The "Saved Reports" tab allows users to edit or create previously saved reports. Reports are deleted by clicking on the red "X" at the left of the report name.



The final two tabs, “Completed Reports” and “Running Reports,” show the status of completed reports or running reports, respectively.

2.3.4: Executive Scoreboard

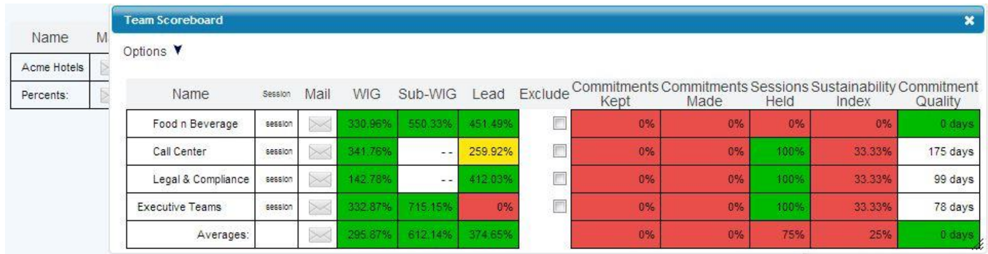
The Executive Scoreboard has a number of features in common with the Team Status report discussed above. The “Organization” section is used to select an OU for which to generate the report. The date range selection works the same as in the Team Status report. The “Options” menu is also the same, except that it does not have the “Export commitments” choice.

Note

Remember, unlike Team Status, the Executive Scoreboard report updates only when “Refresh Report” is clicked.

One significant difference is that the Executive Scoreboard has a “Refresh Report” button in the upper left corner. After selecting or changing the OUs in the “Organization” section, the Executive Scoreboard does not update until the “Refresh Report” button is clicked.

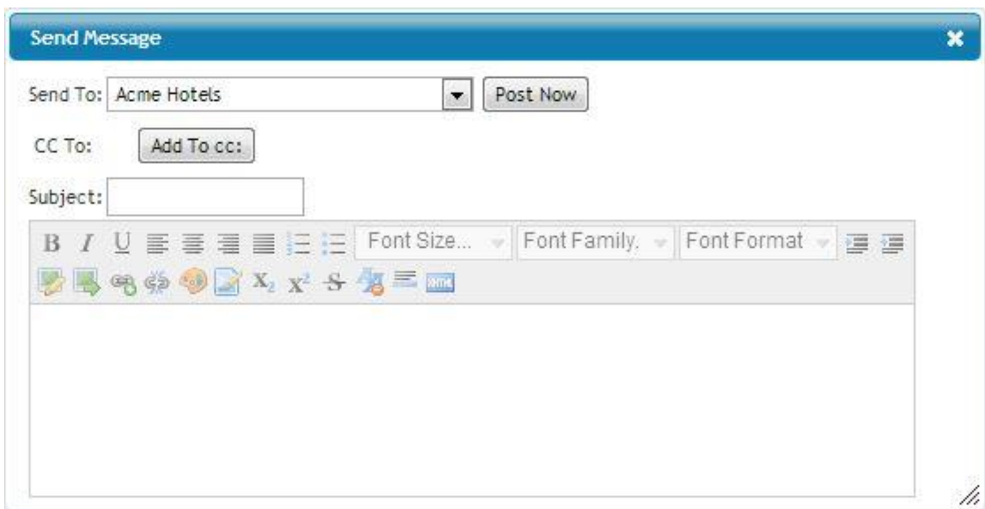
Clicking on the “Name” column opens the “Team Scoreboard” dialog box for the selected OU, as shown below. The “Team Scoreboard” dialog box contains the same information as the Team Status report.



Clicking “Session” opens a WIG Session.

If the “Exclude” checkbox is checked next to a team, the system stops calculating commitment percentages for that team and the averages aren’t included in the overall numbers.

The “Mail” column is an internal messaging tool designed for team recognition and reward. It is available to administrators, champions, and coaches. When the “Envelope” icon is clicked, the “Send Message” dialog box opens, as shown below.



The message is posted in the system. The next time team members in the selected organization log in, the message appears with a profile photo. The “Add To cc:” button opens the “Look Up User” dialog box and allows a copy of the message to be sent to any user in the company, whether he or she is in the selected organization or not.

The “Commitment Quality” column allows a coach or champion to rate the level or quality of commitments by the individual team members using a color-coded ranking of green, yellow, or red (where green is best).

2.3.5: Analysis Report

The Analysis Report displays only for users with the proper permissions. It is available through “Edit User” in the support interface.

2.4: GOAL BUILDER

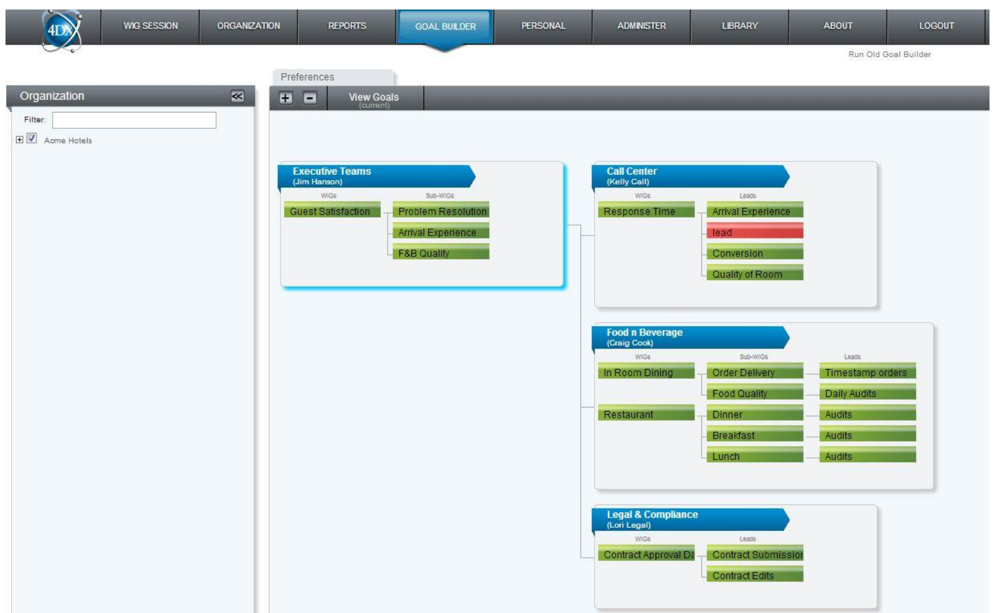
GOAL BUILDER is the tool used to create teams, add people to teams, and create WIGs and Leads.

The GOAL BUILDER tab consists of two primary sections:

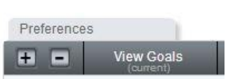
- The “Organization” tab on the left contains a tree view of all available OUs. The “Filter” box at the top of the section filters the OUs and displays only those containing the text entered in the “Filter” box. Using wildcards is not necessary because filtering occurs on partial words.

  On the right end of the “Organization” title bar is a “<<” button that compresses the “Organization” frame, leaving more room for the main display.

- The main window is on the right side of the page. Selecting the checkbox next to an OU causes the “Teams” display to appear in the main window, as shown below.

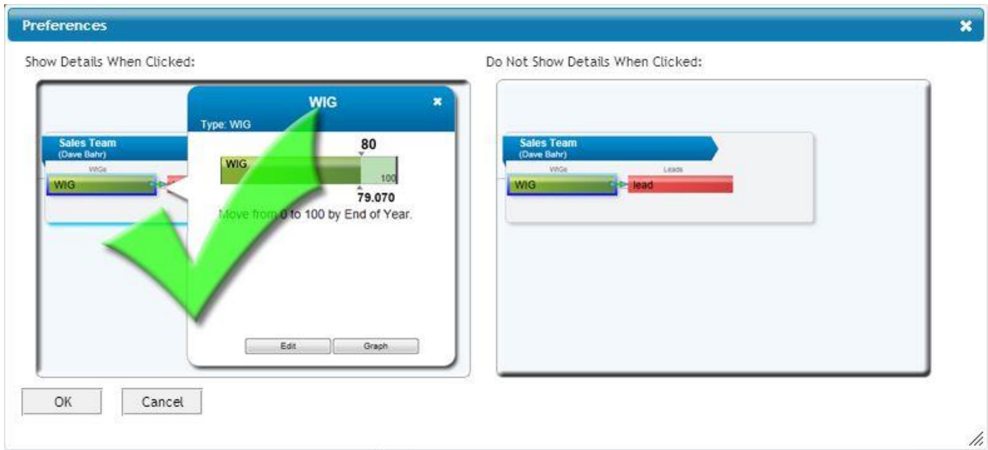


Once OUs are selected, interaction with the GOAL BUILDER page occurs primarily in the main window.



The “+” and “-” buttons (shown at left) on the left end of the main window title bar are used to zoom the display.

The “Preferences” tab above the zoom buttons has a single option: to show or hide details when a goal is clicked.

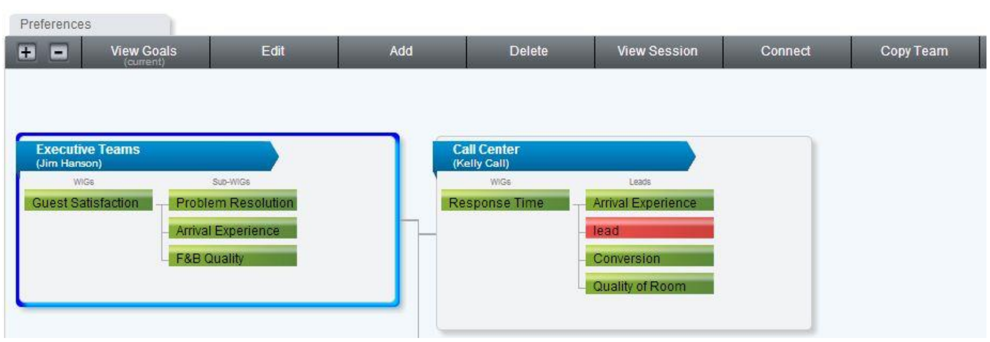


The “View Goals” tab next to the zoom buttons allows switching between goal views. The options are:

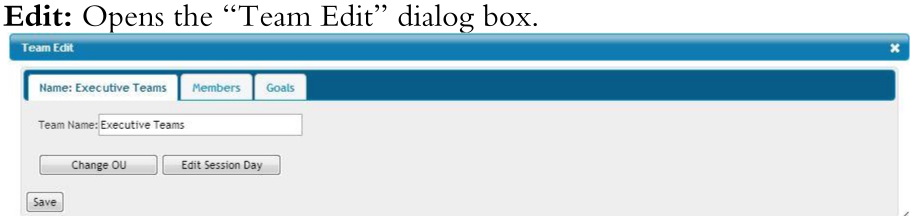
- View Current
- View Future
- View Retired
- View Deleted
- Toggle Goal Table

Clicking on an element in the window changes the context-sensitive menu tabs that appear in the title bar of the frame.

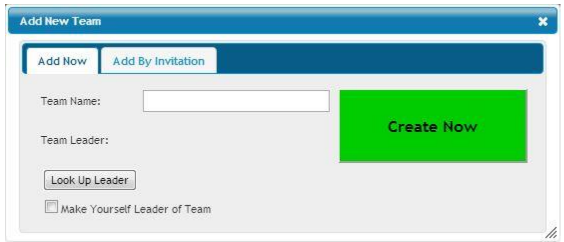
Clicking on a team in the main window results in the following menu choices:



- **Edit:** Opens the “Team Edit” dialog box.



- **Add:** The pop-up menu contains two choices: "Add Team" and "Add WIG."



- **Delete:** Opens a confirmation dialog box. Pressing "OK" deletes the selected team.
- **View Session:** Opens the selected team's WIG Session in a new window.
- **Connect:** Starts the connection process: teams to teams (parent-child), WIGs to Leads, WIGs to WIGs, Leads to Leads, or any goal to another goal, even if the goals are from different teams.
- **Copy Team**: Starts the copying process and allows creation of a new copy of an existing team, it goals, and its leader, but not its team members.

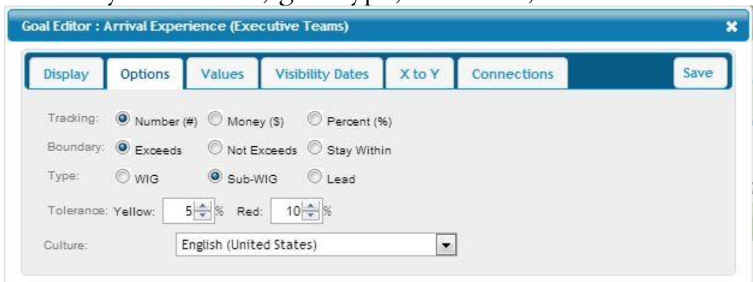
Clicking on a WIG, sub-WIG, or Lead in the main window results in the following menu choices:

- **Edit:** Opens the GOAL EDITOR, which has the following tabs:

  — **Display:** Sets name and description for the selected goal (the name displayed in the WIG SESSION page). The description is shown on the mouse-over pop-up. The description can use the following variables, which are replaced by their values in the displayed description:

    - **:n** – Goal Name
    - **:s** – Start Date
    - **:e** – End Date
    - **:x** – X value
    - **:y** – Y value

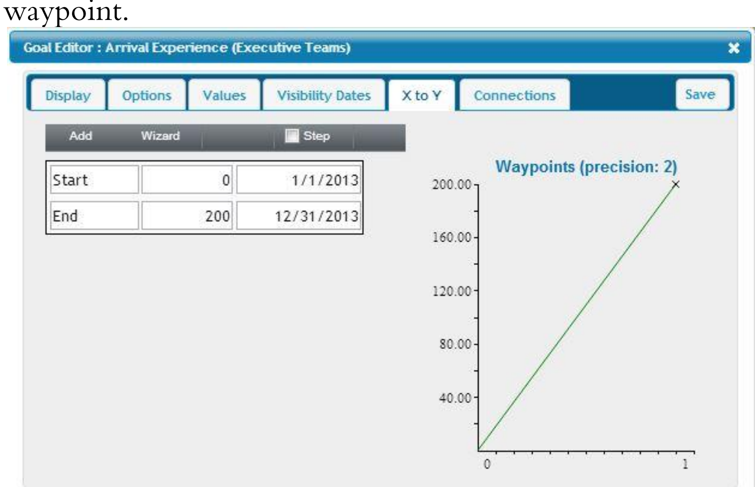
— **Options:** Sets tracking units (number, money, or percent), boundary conditions, goal type, tolerance, and culture values.



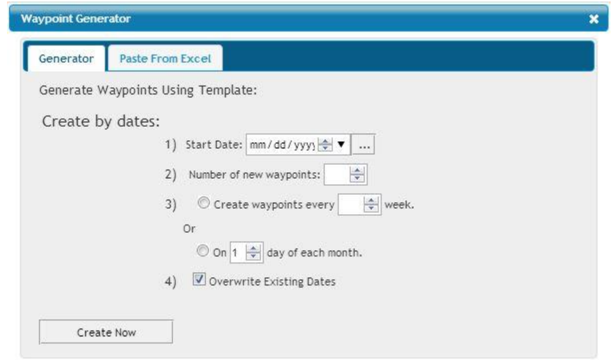
— **Values:** Sets the current goal value.

— **Visibility Dates:** Sets goal "Available" and "Retire" dates.

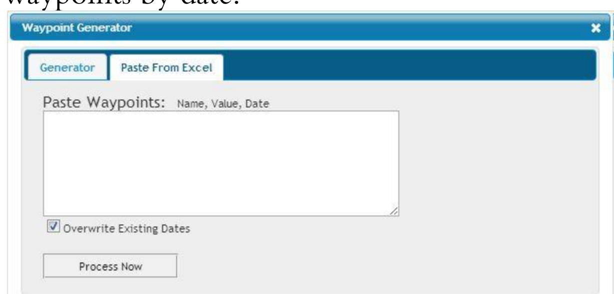
— **X to Y:** Adds waypoints using either the "Add" button or the Waypoint Generator. The "Add" button uses the information from the text boxes and the "Step" checkbox to create a waypoint.



- The “Wizard” link opens the Waypoint Generator, which has two tabs: “Generator” and “Paste from Excel.”



- The “Generator” tab is used to create multiple waypoints by date.



- The “Paste from Excel” tab is used to paste “Name,” “Value,” and “Date” values from Excel for desired waypoints.

— **Connections:** Shows the connections for the current goal. Clicking on the red “X” to the left of the connection removes that connection.

- **Add:** Sub-menu choices are “Add Sub-WIG” or “Add Lead.”
- **Remove:** Remove data

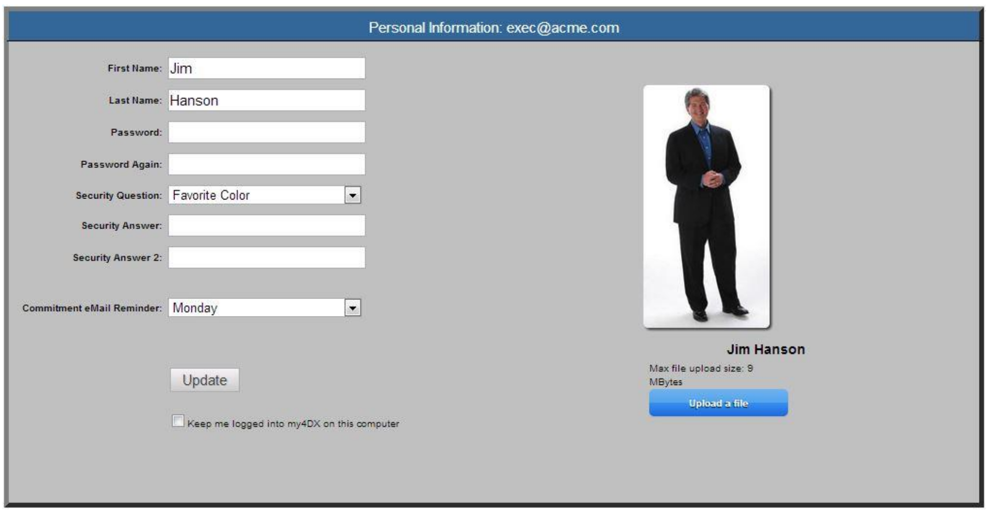
- **Connect:** Connections between goals define contributions: WIGs to Leads, WIGs to WIGs, Leads to Leads, or any goal to another goal, even if the goals are from different teams.
- **Copy Goals:** The pop-up menu contains two choices: "Copy Normal" and "Copy Reference."

2.5: PERSONAL

Note

The account to be modified is listed in the page header after "Personal Information."

The PERSONAL tab changes personal information for the account currently logged in. Clicking on the PERSONAL tab at the top of the main interface opens the Personal Information page.



The page consists of a set of personal information fields, an "Update" button, a checkbox for "Keep me logged into my4DX on this computer," and an "Upload a file" button to upload a picture.

Users can change the following aspects of their account profile. The "Update" button applies the changes.

First Name/Last Name	The "First Name" and "Last Name" fields change the first and last names for the login name listed in the page header. They do not change the login name.
Password	Changes the password. If the text entered in the "Password" and "Password Again" fields does not match, the system responds with the error message "The two passwords MUST match" in red. This error message appears before the "Update" button is pressed. NOTE: Passwords are case sensitive.

Security Question/Answer

Security questions can be chosen from the following:

- Mother's maiden name
- Favorite pet name
- Birth city
- Favorite color

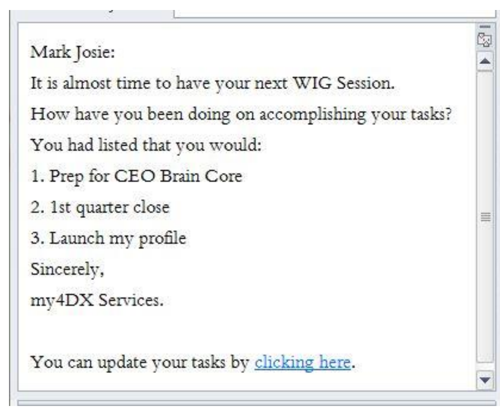
The text entered in the "Security Answer" and "Security Answer 2" fields must match. Both the question and answer are used for the "Forgot Password" function on the Login page.

NOTE: Security answers are case sensitive.

Commitment Email Reminder

The "Commitment Email Reminder" function is set by default to "No Reminder." Users select a weekly email reminder by choosing the day of the week from the drop-down menu.

The email reminder looks similar to the following:


Mark Josie:
It is almost time to have your next WIG Session.
How have you been doing on accomplishing your tasks?
You had listed that you would:
1. Prep for CEO Brain Core
2. 1st quarter close
3. Launch my profile
Sincerely,
my4DX Services.

You can update your tasks by clicking here.

The "clicking here" hyperlink links to the My4DX website for updating commitments.

If the user replies to the email with the numbers of the commitments completed, the system automatically checks them as complete. For example, if the reply is "1,2," the system checks commitments 1 and 2 as complete. If the reply is "1-3," it checks off commitments 1 through 3.

Portrait	The “Browse” button under the photo area prompts a “File Open” dialog box for the user to select a photo from his or her computer. File types .jpg and .tiff work best. Files must be 9 MB or smaller. NOTE: Clicking the “Clear” button removes the current photo without replacing it.
Stay Connected	The “Keep me logged into My4DX on this computer” checkbox makes the system not entirely disconnect the user. When the system times out, a button appears that returns the user to the page last used. NOTE: If the user manually logs out of the site, this option needs to be re-checked. The system times out after approximately 15 minutes of inactivity.

2.6: ADMINISTER

The ADMINISTER tab contains the following menu choices on the pop-up menu that appears when the user hovers the mouse over the ADMINISTER tab:

- Reload Wizard
- Mass Update
- Users
- Team Invitation Wizard
- Manage Team Invitations
- User Invitations
- User Privileges
- Company
- Advanced Administration

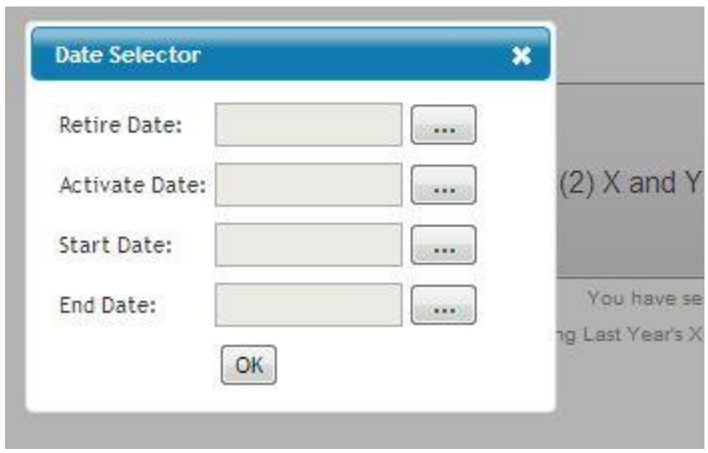
Clicking the ADMINISTER tab directly without making a menu choice defaults to the Users page. The menu items for the ADMINISTER tab are described below.

2.6.1: Reload Wizard

The Reload Wizard allows users to reload goals for OUs administered OUs.

To use the Reload Wizard:

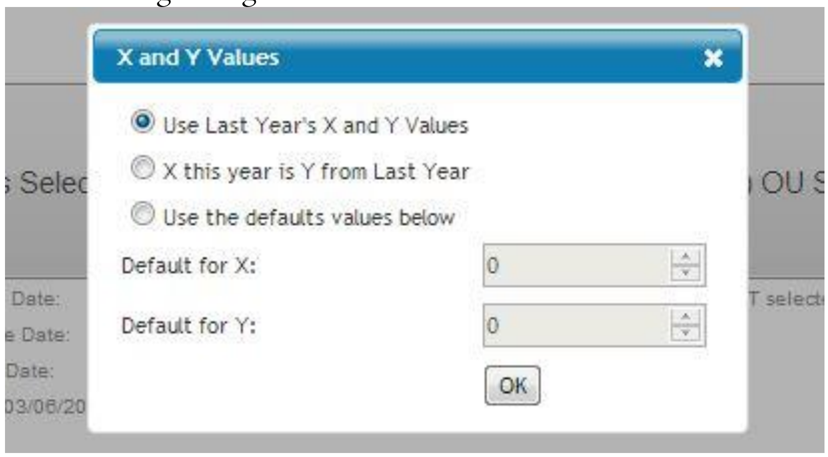
1. Select the date ranges desired. Click the "(1) Dates Selector" button to open the "Date Selector" dialog box.



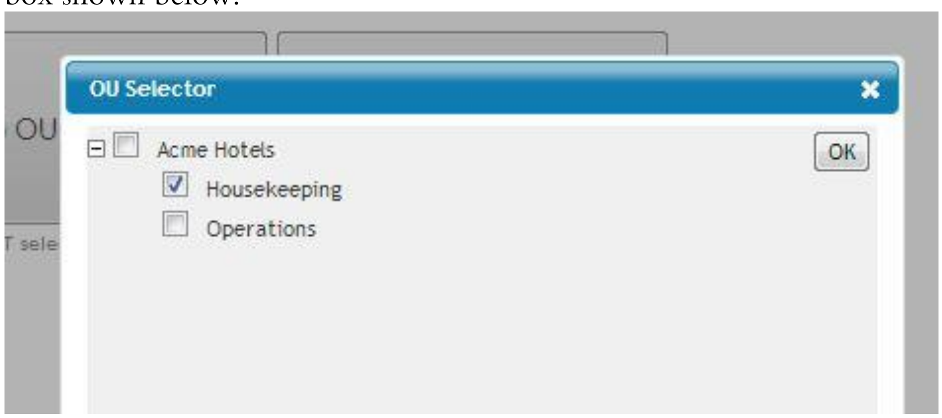
Clicking the button next to any of the "Date Selector" fields brings up a calendar, as shown at left. Alternatively, dates can be entered directly in the "Date Selector" fields using the format mm/dd/yyyy. The dates that can be entered are:

- **Retire Date:** The date when the goal will be removed from active tracking
- **Activate Date:** The date when the goal will be added to active tracking
- **Start Date:** The goal start date (X)
- **End Date:** The goal end date (Y)

2. Select the X and Y values to use. Clicking "(2) X and Y values" prompts the following dialog box:



3. Select the desired OU. Clicking on "(3) OU Selector" opens the dialog box shown below.



Selecting an OU that has already been copied displays the message "WARNING: This organization has already been copied. Do not copy again or you will create another copy of the goals."

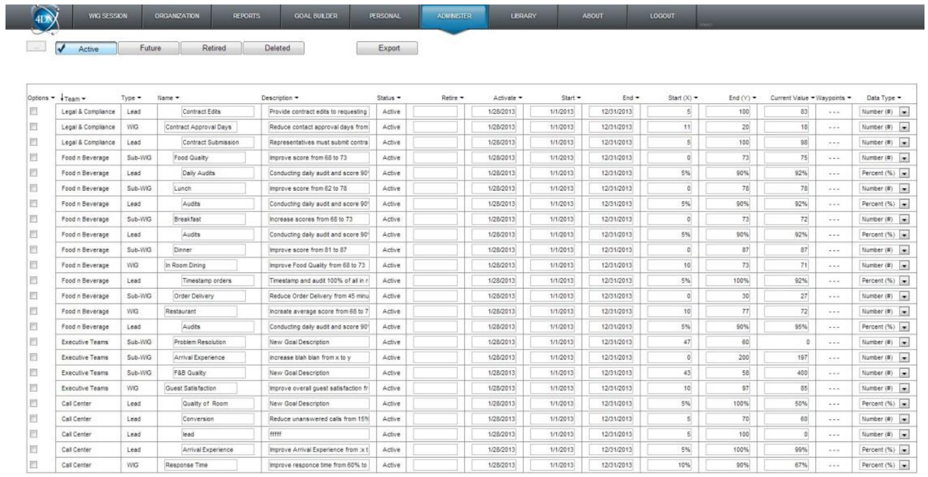
4. Click "(4) Copy Now…" to copy the selected goals.

2.6.2: Mass Update

Mass Update is an extremely powerful method for changing a large number of WIGs, sub-WIGs, and Leads at the same time. The Mass Update page consists of a spreadsheet-style view of all selected WIGs, sub-WIGs, and Leads for the selected team or teams, or for the entire organization. Teams are selected using the button in the upper left corner of the screen, as shown at left. In addition, goals are selected using the following buttons along the top of the screen:

- **Active:** All active goals
- **Future:** All future goals
- **Retired:** All goals that have been retired

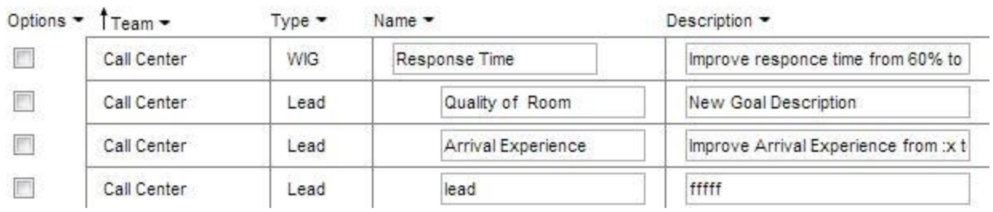
- **Deleted:** Deleted goals



The columns are as follows:

- Options
- Team (not editable)
- Type (WIG, sub-WIG, or Lead; not editable)
- Name (text)
- Description (text)
- Status (not editable)
- Retire (date)
- Activate (date)
- Start (date)
- End (date)
- Start (X) (value)
- End (Y) (value)
- Current Value (value)
- Waypoints (not editable)
- Data Type (currency, number, or percent)

Clicking on a column header sorts by the values of the column. Clicking again reverses the sort. The sorted column and direction are indicated by an arrow to the left of the sorted column header, as shown below.

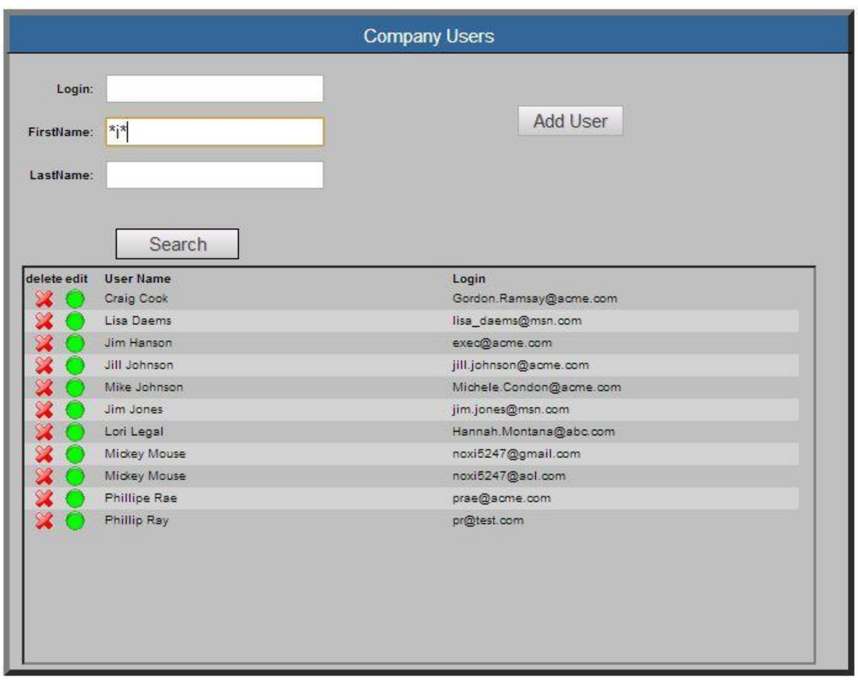


Each column has a drop-down menu that allows filtering on any of the values in the column.

Clicking the "Export" button in the top center of the screen exports the sorted, filtered spreadsheet as an .xlsx file.

2.6.3: Users

The "Users" menu item links to the Company Users page. The page consists of a "Search" button that searches on Login, First Name, or Last Name, and an "Add User" button as shown below:



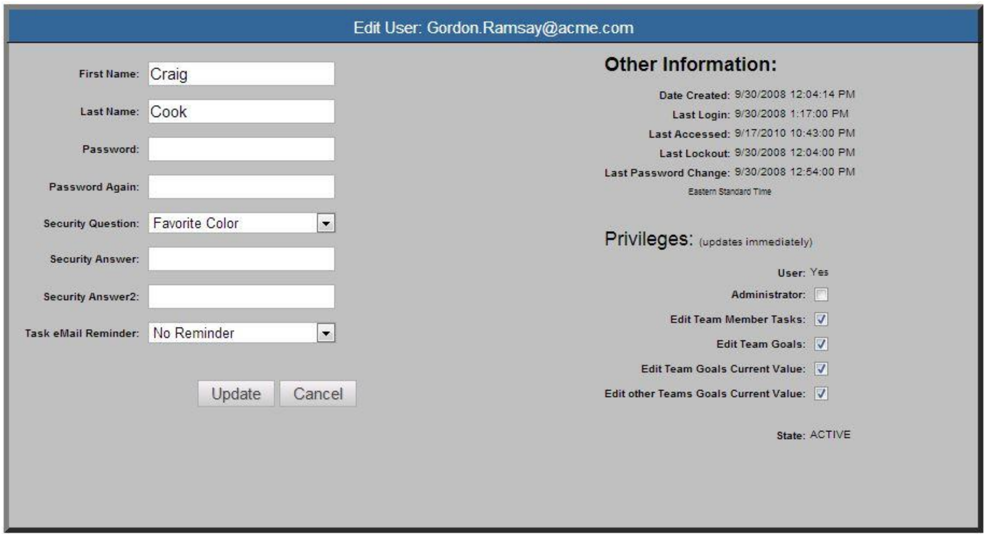
Example: Search

Searching for "j*" in the "FirstName" field returns any name that starts with J: Jim, Jeff, Jill, Jose, etc. Searching for j*i* returns any name starting with J and with an i anywhere in it: Jill, Jim, Jaime, etc. Searching for j*i, though, returns only names that start with J and end with i.

The "*" wildcard can be used for partial word matches. The search is not case sensitive, but it returns only whole words or wildcard matches.

Pressing the red "X" to the left of a name deletes that user. The circle adjacent to the "X" is yellow or green.

- A yellow circle indicates that the account is currently locked out. Clicking the yellow circle unlocks the account.
- Clicking the green circle next to a name navigates to the "Edit User" screen shown below.



The Edit User page is similar to the Personal Information page reached through the PERSONAL tab in the main interface. The primary differences are that the Edit User page allows editing another user's information and also replaces the photo with "Other Information" and "Privileges."

The "Edit User" title bar displays the user login being edited. As in the Personal Information page, the left column contains:

- First Name
- Last Name
- Password
- Password Again
- Security Question
- Security Answer
- Security Answer2
- Task Email Reminder

See the description of these fields in section 2.5: PERSONAL for details.

The upper right of the page gives the following additional user information:

- Date Created
- Last Login
- Last Accessed
- Last Lockout
- Last Password Change
- Time Zone

Note

Privileges update immediately. It is not necessary to press the “Update” button.

Privileges for this user can be granted or removed using the checkboxes in the lower right. The privileges are the same as in the “Manage Privileges” drop-down box:

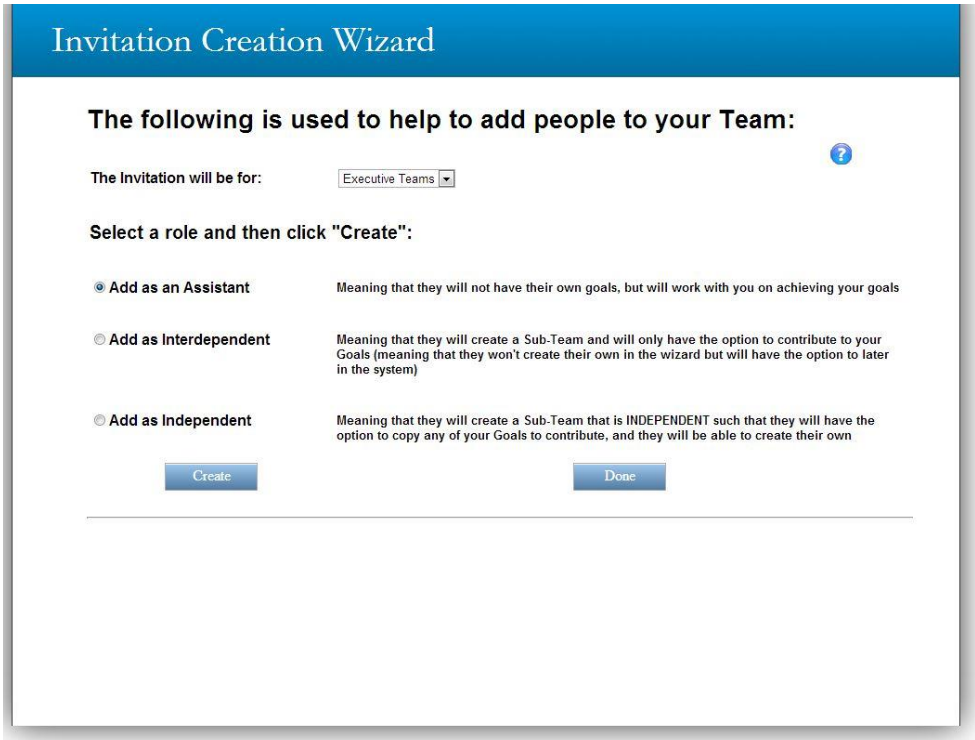
- **Administrator:** Makes the user an administrator
- **Edit Team Member Tasks**
- **Edit Team Goals**
- **Edit Team Goals Current Value**
- **Edit other Teams Goals Current Value**

2.6.4: Team Invitation Wizard

Note

The link in the email expires after 1 week.

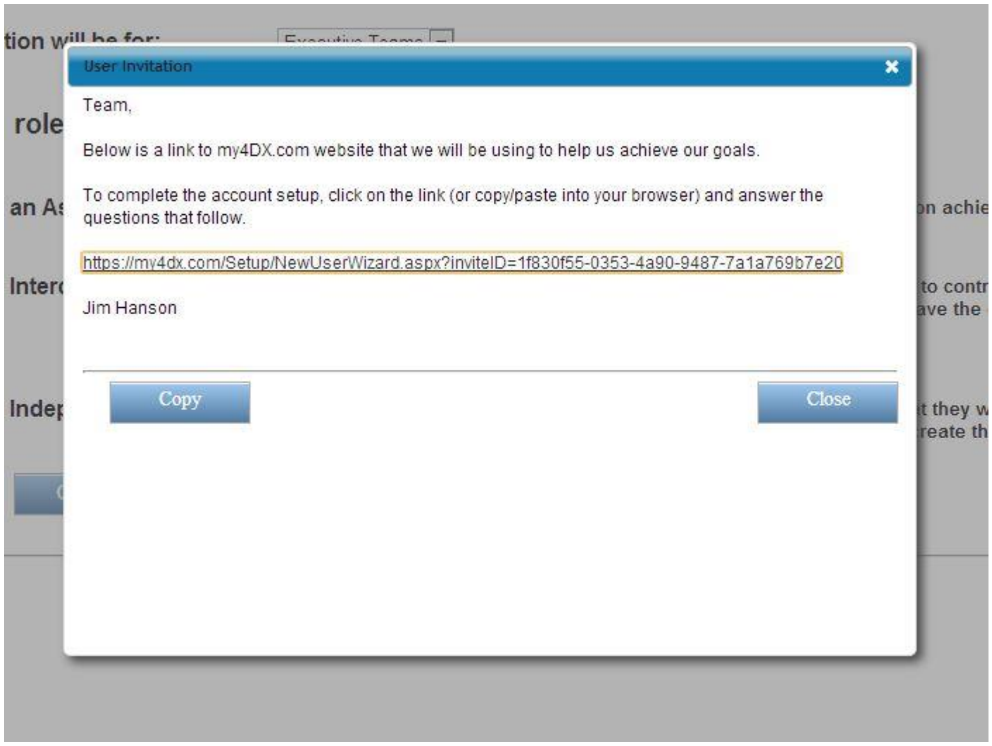
The Team Invitation Wizard provides a simple way to create a team email that contains a link to the New User Creation Wizard. Clicking on the “Team Invitation Wizard” menu item takes you to the Team Invitation Creation Wizard page.



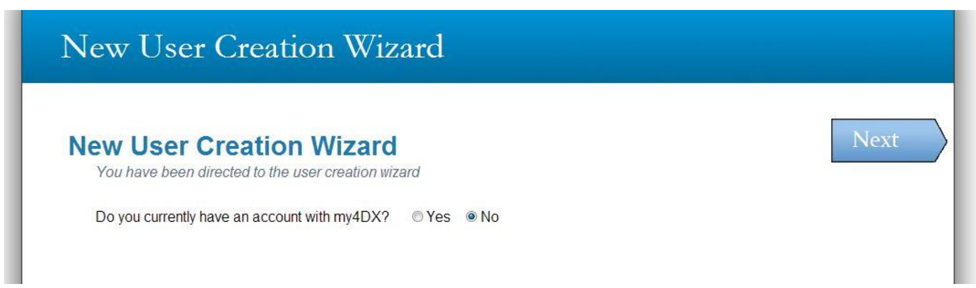
Invitations can be created for three roles:

- **Assistant:** Assistants don't have separate, independent WIGs and Leads; they do have independent commitments to assist the team in reaching the existing WIGs and Leads.
- **Interdependent:** Creates an invitation to be the leader of a sub-team.
- **Independent:** The new role is completely independent, with its own WIGs, Leads, and commitments.

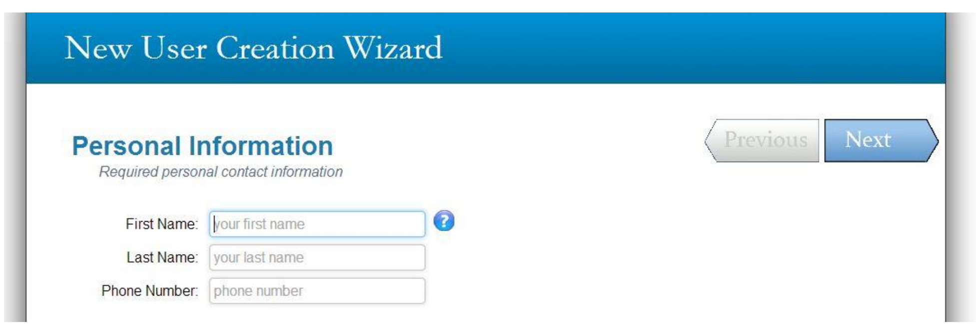
Once a role is selected, pressing the "Create" button brings up a "User Invitation" dialog box containing text that can be copied and sent to team members.



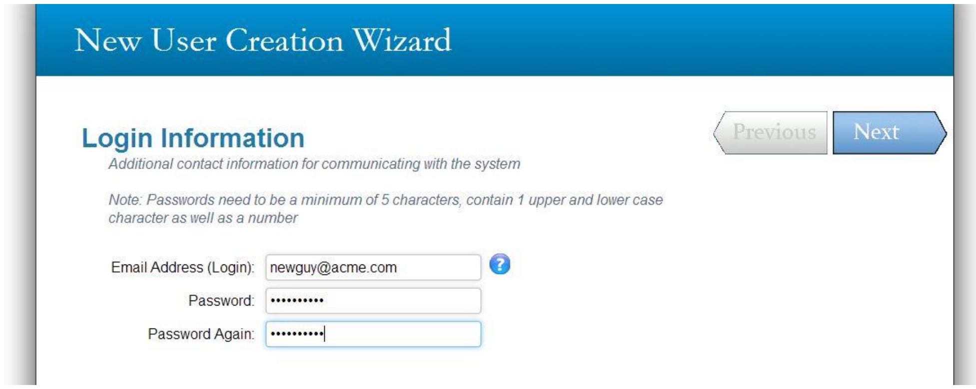
The text includes a link that takes invitees to the New User Creation Wizard, which has somewhat different choices depending on the role chosen. For a user added as an assistant, the user is given the option to set up a new my4DX account.



This page determines whether the user already exists.



The three fields are “First Name,” “Last Name,” and “Phone Number.”

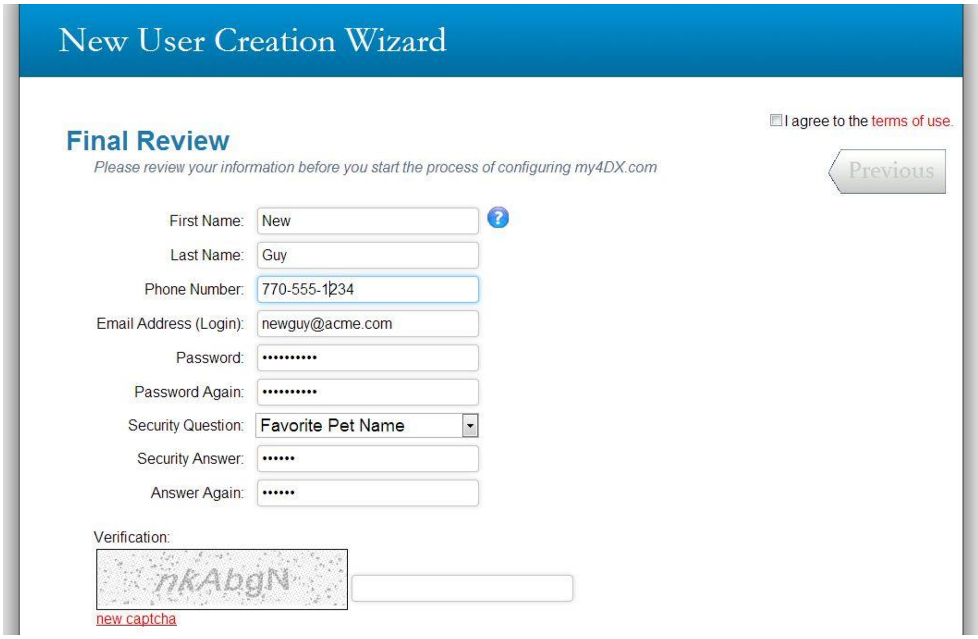


Note

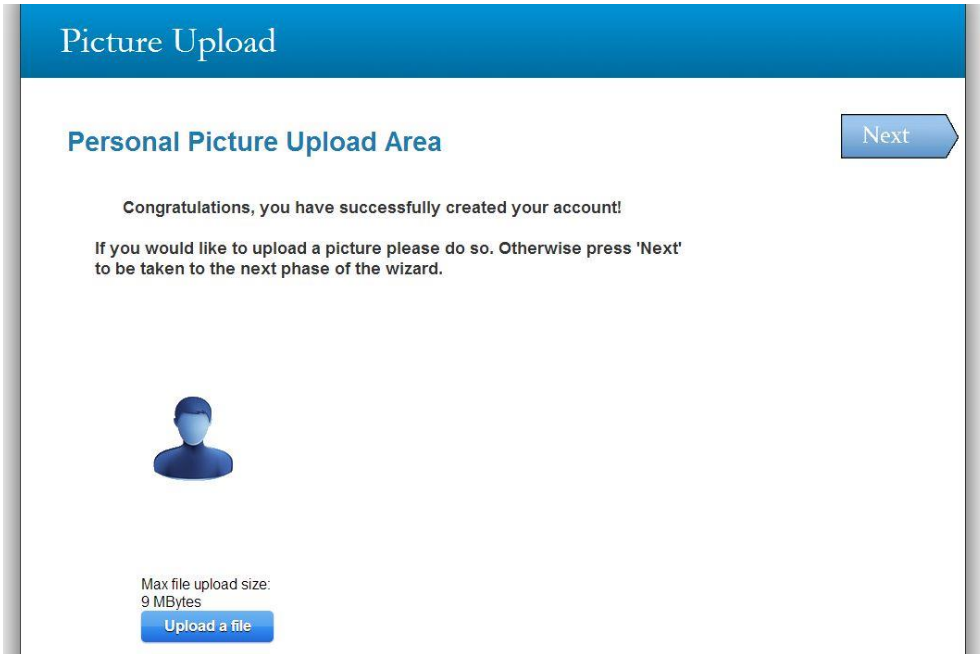
Users may be added twice accidentally if they use a different email address. There is no reason for a user to have multiple accounts with different emails. If a person has multiple roles, he or she should perform them through one user account.

If the email address used to create the new user already exists in the system, the page returns an error when "Next" is pressed. The text entered in the "Password" and "Password Again" fields must be identical. (Both are case-sensitive.) If they are not identical, an error is returned next to the "Password Again" field when "Next" is clicked.

For the selected security question, the text in the "Security Answer" and "Answer Again" boxes must match exactly (both fields are case-sensitive), or an error results.



The Final Review page of the New User Creation Wizard collects the information from the wizard in one place. Text boxes and drop-downs can be changed at this point. Clicking on the red "terms of use" link in the upper-right corner of the screen brings up the Terms of Use document. To proceed, the user must check the "I agree to the terms of use" checkbox and fill in the captcha at the bottom of the screen; then a "Create" button appears.



Once the account is created, the Picture Upload page can be used to upload a picture for the account. The maximum file upload size is listed above the

"Upload a file" button, which opens a dialog box for selecting a photo on the user's local machine.

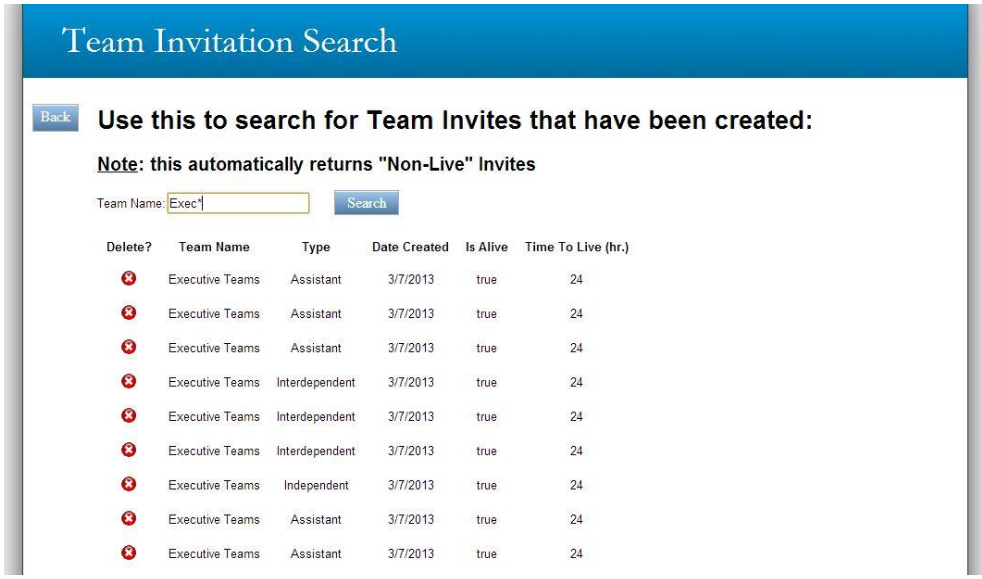
After the photo uploads, the wizard notifies the user which role the Team Leader selected when the invitation was created. The next page (Your Team's Details) reports the team name and lists some of the team goals, as shown below.

The final page of the wizard consists of a congratulations message and the "Finish" button, which takes the user to the main WIG SESSION tab.

2.6.5: Manage Team Invitations

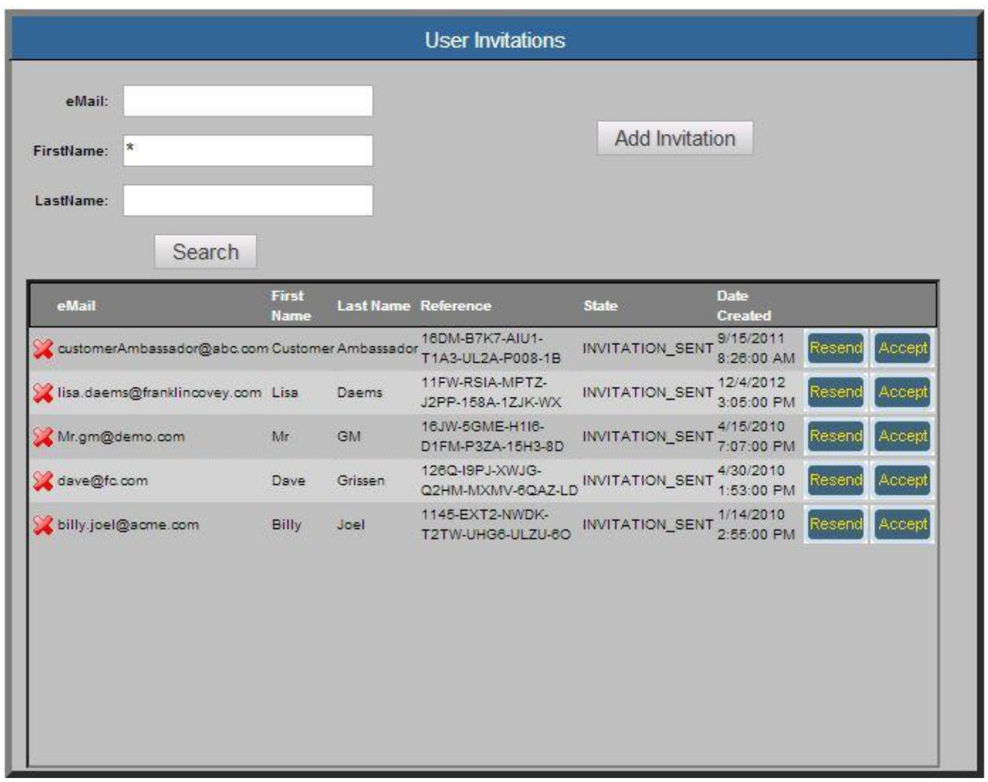
The "Manage Team Invitations" menu item gives access to the Manage Team Invitations page. The page, shown below, consists of a "Team Name" search box used to view team invites that have been created. The "Back" button in the top left corner of the screen returns to the main interface. Typing in a team name displays any invitations that have been created. (The "*" wildcard character works in this box.) The list of invitations appears below the search box. Invitations can be deleted using the red "X" button in the "Delete" field next to the invitation. The "Team Name," "Type," "Date Created," and "Time to Live" values and the "Is Alive" flag are shown for each invitation.

The "Is Alive" flag indicates whether the invitation is still active, and the "Time to Live" value represents the number of hours until the invitation times out.



2.6.6: User Invitations

The "User Invitations" menu item allows the user to create and monitor user invitations. This menu item links to the User Invitations page.



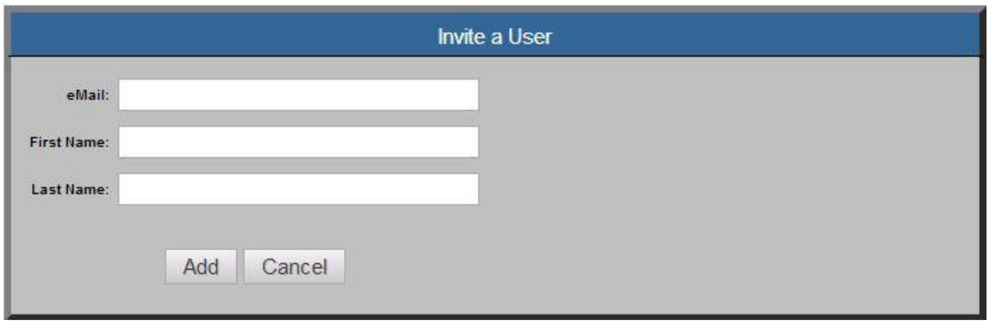
The "Email," "FirstName," or "LastName" fields can be used to search for pending user invitations. The "*" wildcard character can be used. User invitations are shown in the box below the "Search" button. Clicking the red "X" at the left side of the invitation deletes invitations. However, no confirmation dialog box appears.

Note

If an invite is not accepted within 30 days, it must be accepted for the user or (preferably) deleted and a new invitation created.

The "Resend" button resends the invitation (in case it has been lost). Using the "Accept" button accepts the invitation for the user, but login information, etc., must then be sent separately to the user. (The user has no record of the acceptance or any information about his or her login.)

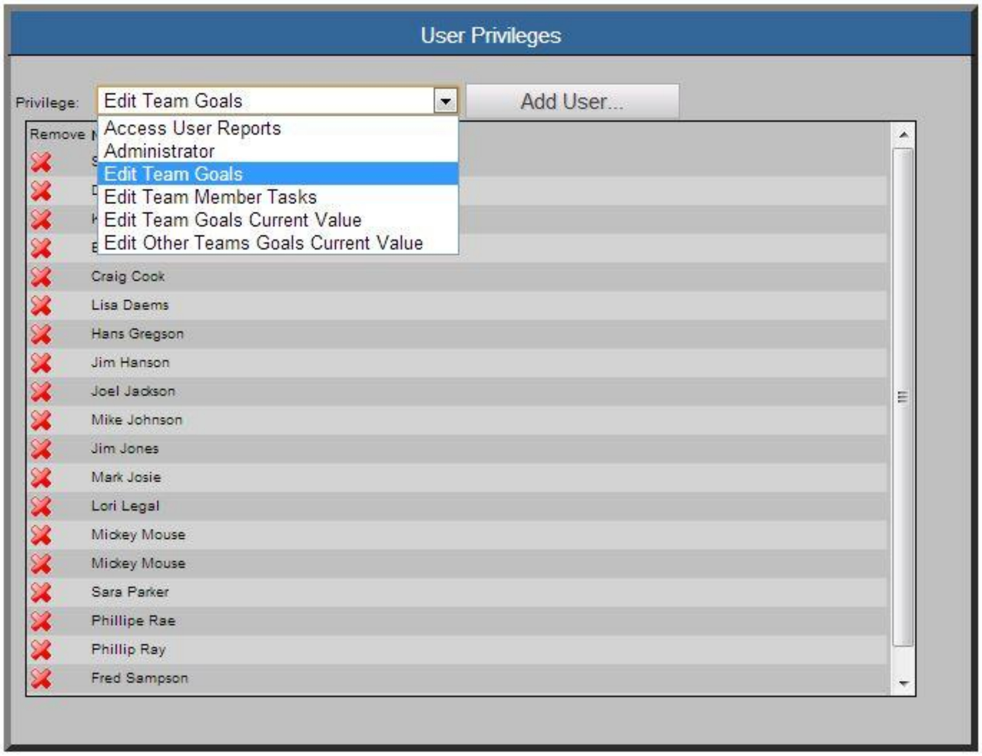
The "Add Invitation" button near the top right corner of the page can be used to add a new invitation. This button links to the "Invite a User" page.



When a user attempts to add an invitation, any error messages appear in red on the right side of the dialog box.

2.6.7: User Privileges

The "User Privileges" menu item links to the "User Privileges" page, as shown below.

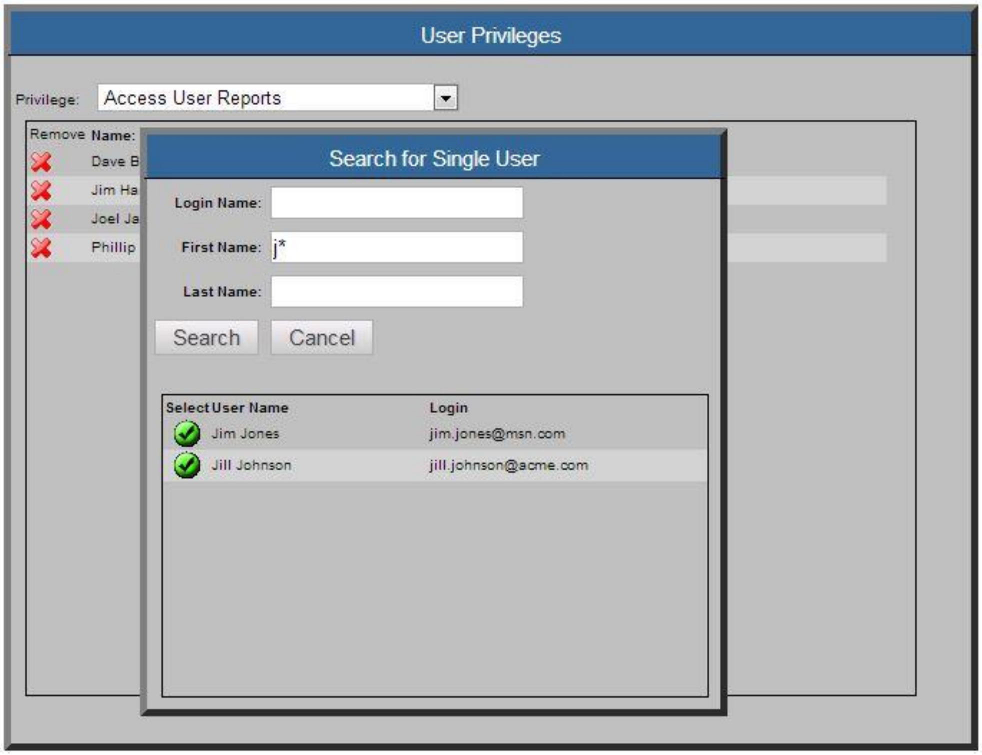


This page is ordered by privilege rather than by individual user. To set user privileges, the user chooses the desired privilege from the "Privilege" drop-down menu. Privileges that can be granted are:

- Access User Reports
- Administrator
- Edit Team Goals
- Edit Team Member Tasks
- Edit Team Goals Current Value
- Edit Other Teams Goals Current Value

Once a privilege is selected, all users who have that privilege are listed in the box below the drop-down menu. Clicking the red "X" next to a user's name removes the displayed privilege from that user. The "Are you sure you want to remove the privilege from this user?" dialog box pops up and asks the user to confirm or cancel the deletion.

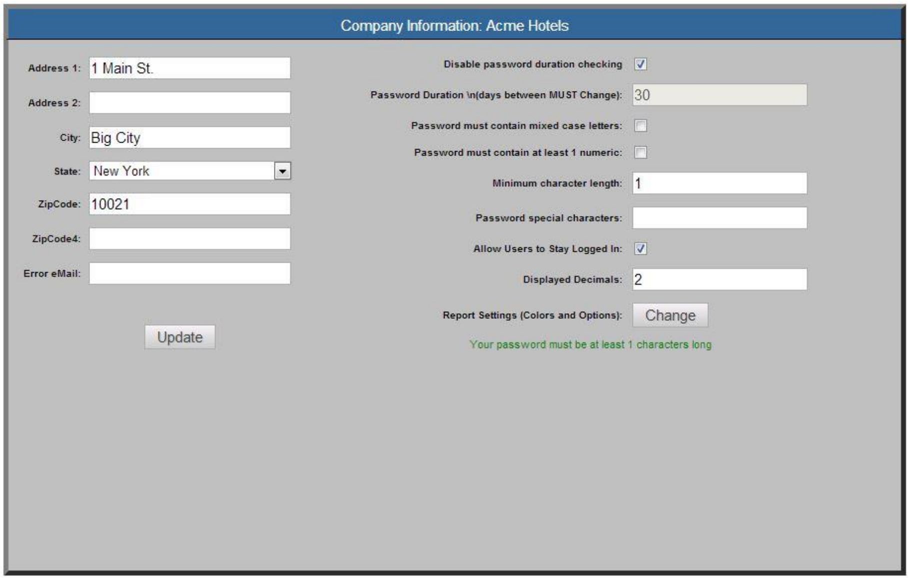
The “Add User…” button opens the “Search for Single User” dialog box, as shown below.



Searches are performed by login name, first name, or last name. Searches should include the entire name or login name, or the “*” wildcard character to match partial names. The green checkmark to the left of the user name grants the displayed privilege. No confirmation dialog box appears, but the privilege can simply be removed if it was granted in error.

2.6.8: Company

The “Company” menu item allows the user to enter company information, including company address, company email address, various password preferences, and report settings.



The "Company Information" page has fields for "Address" (two lines), "City," "State," and "ZIP Code" (both the standard ZIP code and a second field for the 4-digit ZIP extension). It also contains an "Error Email" field for sending error messages (usually to company support personnel).

After company information is entered or modified, clicking the "Update" button submits the information. Successful changes result in a green "Updated Successfully!" message below the button.

Note

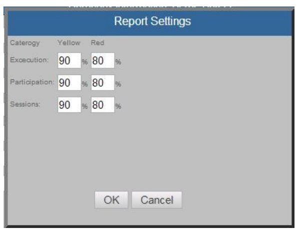
Unchecking the "Disable password duration checking" box forces passwords to expire in the number of days listed in "Password Duration."

The right column of the page contains password preferences and report settings. The password settings are:

- **Disable password duration checking** (checkbox): Allows passwords to persist indefinitely.
- **Password duration:** Number of days before the password must be changed.
- **Password must contain mixed case letters** (checkbox): When this box is checked, the password must contain at least one uppercase and one lowercase letter.
- **Password must contain at least 1 numeric** (checkbox): When this box is checked, the password must contain at least one number.
- **Minimum character length:** Sets the minimum required length for a password.
- **Password special characters:** Requires the user to include at least one of these characters in the password.

- **Allow users to stay logged in** (checkbox): Enables the "Stay Logged In" checkbox on the "Profile" screen.
- **Displayed Decimals:** Determines how many digits after the decimal point are displayed on WIGs and Leads in the WIG Session.

Although these fields are physically separated from the "Update" button (including the "Disable password duration checking" checkbox), they do not automatically update. Clicking the "Update" button below the left column saves any changes.



The last item in the right column is the "Report Settings" button. The "Change" button displays the dialog box shown at the left. This dialog box is used to set the yellow and red threshold levels for Execution (Commitments Kept), Participation (Commitments Made), and Sessions (WIG Sessions held) on the "Team Status" and "Executive Scoreboard" reports.

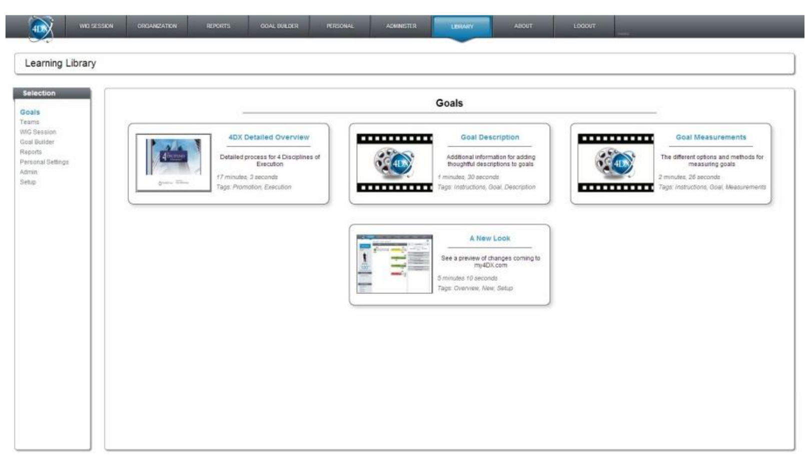
2.6.9: Advanced Administration

The "Advanced Administration" sub-menu item appears only for login names that have permissions to access the Advanced Administration Interface. The Advanced Administration Interface is a separate interface and is discussed in the Advanced Administration Tools section later in this document.

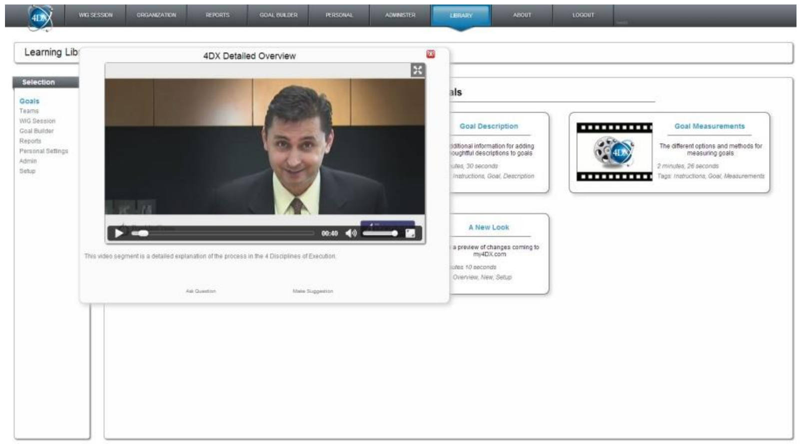
2.7: LIBRARY

The LIBRARY tab opens the My4DX Learning Library, which contains videos about various elements of the My4DX application and *The 4 Disciplines of Execution*.

Video categories are listed in the "Selection" frame on the left side of the screen. The currently selected topic is highlighted in blue, and the videos available for that topic are listed in the main frame.



Videos open and auto-start in an overlay window within the page itself.



2.8: ABOUT

The ABOUT tab opens a page containing copyright and developer information, including links to the Terms of Use and Privacy Policy documents, which open in a separate window.

2.9: LOGOUT

Clicking the LOGOUT tab in the top menu logs the user out of the current My4DX session and returns to the Login page. (See section 1: My4DX Login Page in this Application Interface section.)

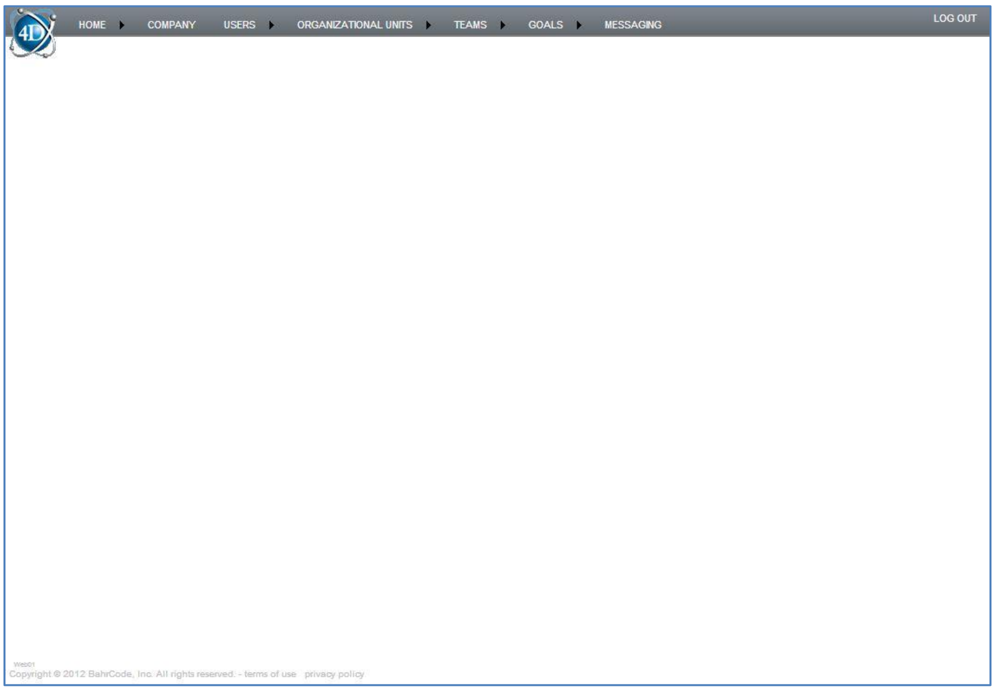
Advanced Administration Tools

Note

The Advanced Administration Interface is not updated as often as the main interface. Much of the functionality is now in the main interface.

1. Advanced Administration Access

Selecting “Advanced Administration” from the ADMINISTER drop-down menu switches interfaces to the Advanced Administration Interface, shown below.



2. Advanced Administration Interface

The Advanced Administration Interface has the following tabs in the menu bar at the top of the screen:

- HOME
- COMPANY
- USERS
- ORGANIZATIONAL UNITS
- TEAMS
- GOALS
- MESSAGING
- LOG OUT

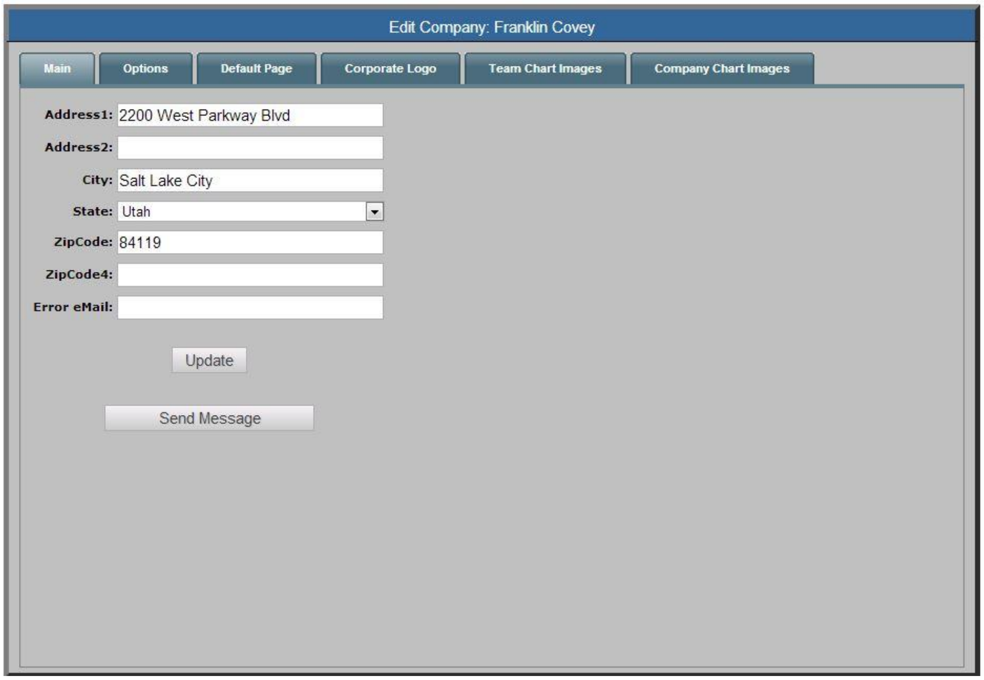
The following sections describe the contents of each tab.

2.1: HOME

The HOME tab has a single drop-down menu choice, "Website Home." Selecting this menu option returns the user to the main My4DX interface.

2.2: COMPANY

The COMPANY tab opens the "Edit Company" page, as shown below.



The Edit Company page has six tabs:

- Main
- Options
- Default Page
- Corporate Logo
- Team Chart Images
- Company Chart Images

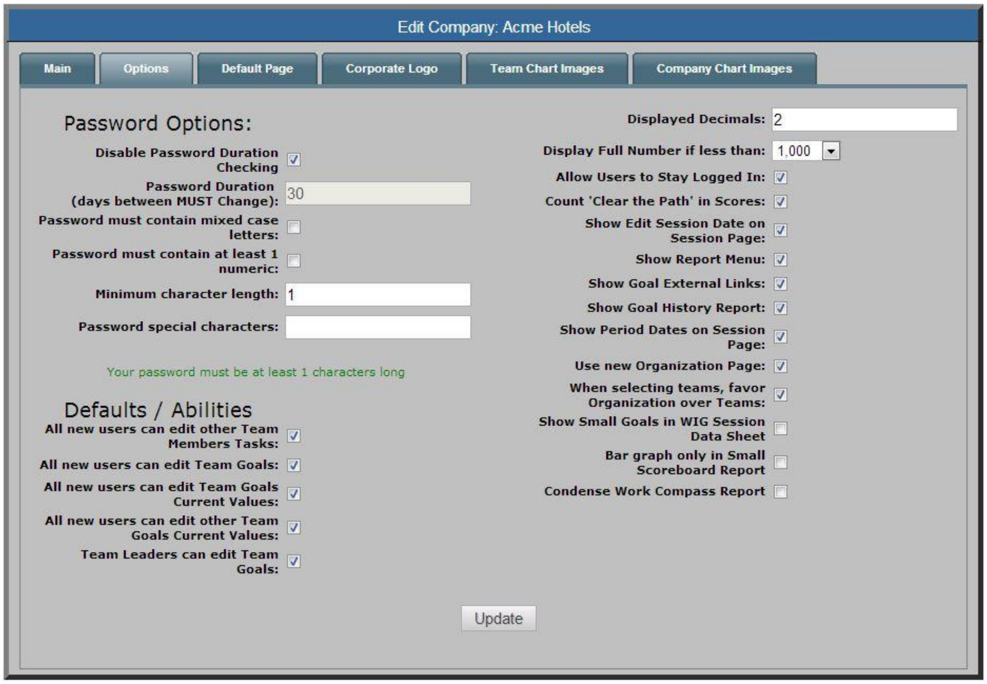
2.2.1: Main

The "Main" tab (shown above) consists of text boxes containing basic company information (Address, City, State, ZIP), and an error email address. The error email address, used when an error occurs in the system, sends an email to the entered email address. (This would likely be used only with an IME or admin.)

The tab also contains a "Send Message" button, which can be used to send a message company wide.

NOTE: This button opens the main interface in a new window.

2.2.2: Options



The "Options" tab of the "Edit Company" page has three main sections: password options, defaults/abilities, and general options.

Password options include:

- **Password Duration:** Sets the number of days until the password must be changed (unless disabled by the "Disable Password Duration Checking" checkbox).
- **Password special characters:** Password requirements can be defined with checkboxes for "must contain at least 1 numeric" and "must contain mixed case letters," as well as any specific special characters that must be included (entered in the "Password special characters" text box).
- **Minimum character length:** Sets the minimum length of the password.

The Defaults/Abilities section contains checkboxes that allow all new users to edit other team members' tasks, team goals, current values, and other team goals current values. Additionally, Team Leaders can edit team goals.

The general options including:

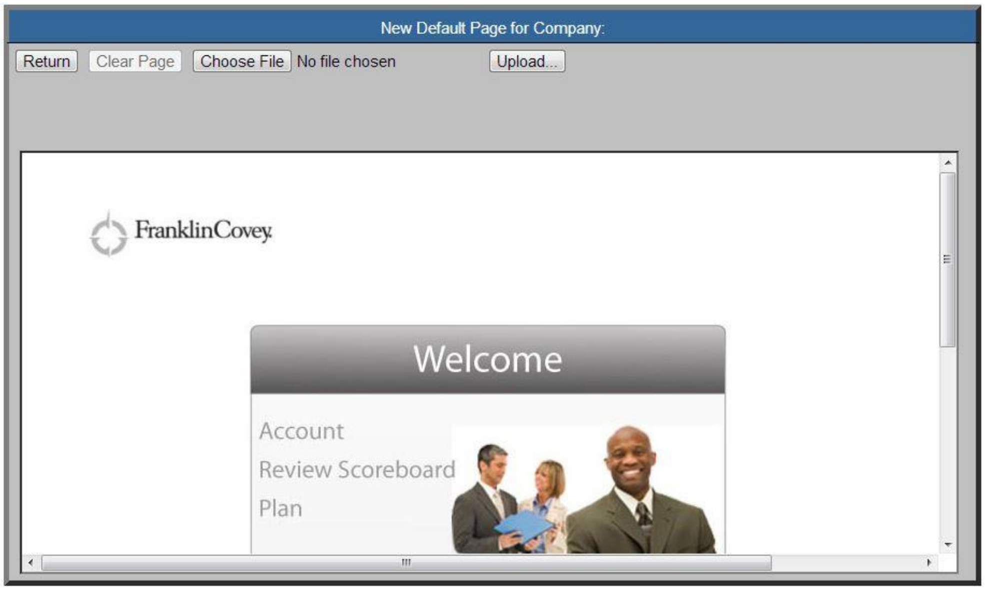
- **Displayed Decimals:** The number of digits beyond the decimal point displayed on WIGs and Leads in the WIG Session.
- **Display Full Number if Less Than:** Determines to what size full numbers are displayed.
- **Allow Users to Stay Logged In:** Enables the "Stay Logged In" checkbox on the Login screen.
- **Count "Clear the Path" in Scores:** If this checkbox is selected, commitments entered in the "Clear the Path" section count toward commitment scores.
- **Show Edit Session Date on Session Page**
- **Show Report Menu:** Determines whether the "Report" tab appears.
- **Show Goal External Links:** Determines whether the "External Links" section appears.
- **Show Goal History Report:** Determines whether the Goal History Report is visible in the PRINT tab.
- **Show Period Dates on Session Page**
- **Use New Organization Page**
- **When selecting teams, favor Organization over Teams**

The following three options set the default print preferences. The print preferences can be changed in the "Preferences" menu under the "Print menu" in the WIG Session.

- **Show Small Goals in WIG Session Data Sheet:** If this option is not checked in the "Print" menu in the WIG Session, it displays all of the goals at the top of the report and all of the commitments for those goals at the bottom. When checked, it displays all of the goals to the side and the commitments for those goals to the immediate right. The default option is unchecked for all companies.
- **Bar Graph Only in Small Scoreboard Report:** When unchecked, this option displays the line goal and a history graph in line graph form along with the description at the bottom. When checked, it displays a bar graph and the description only. The default option is unchecked for all companies.
- **Condense Work Compass Report:** The Work Compass Report displays all of the goal names (WIGs and associated Leads) and the commitments for each of those goals. This display is the same for both versions of this report. When this option is unchecked, it displays a minimum of three checkboxes under each goal whether or

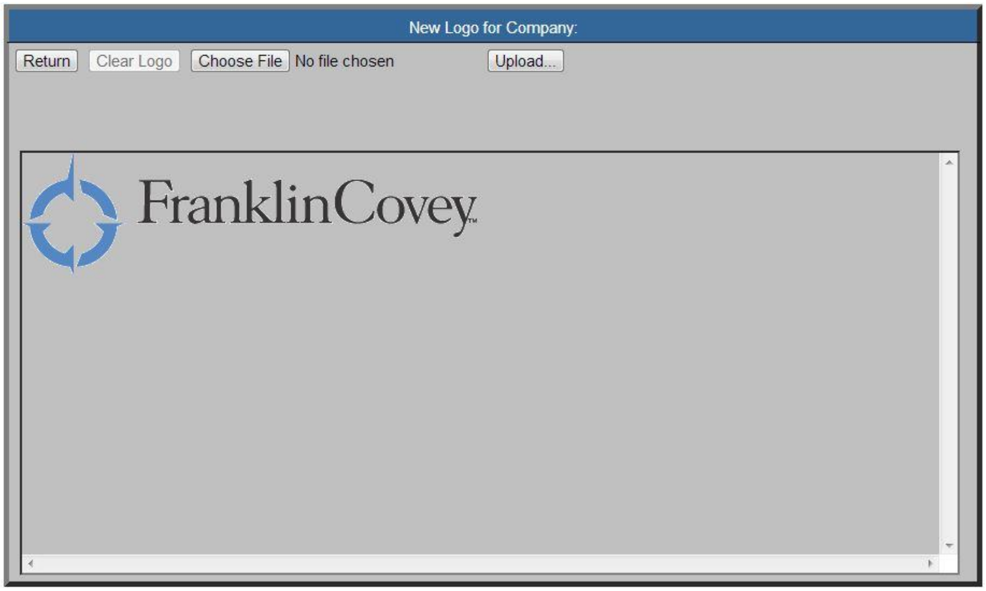
not a commitment exists. When this option is checked, it displays only the goals with commitments attached to them; also, it displays only the number of checkboxes necessary for the already existing commitments. For each report, the system continues to show the Day Job commitments on the back sheet with a minimum of three checkboxes showing whether or not the Day Job commitments exist. The default option is unchecked for all companies.

2.2.3: Default Page



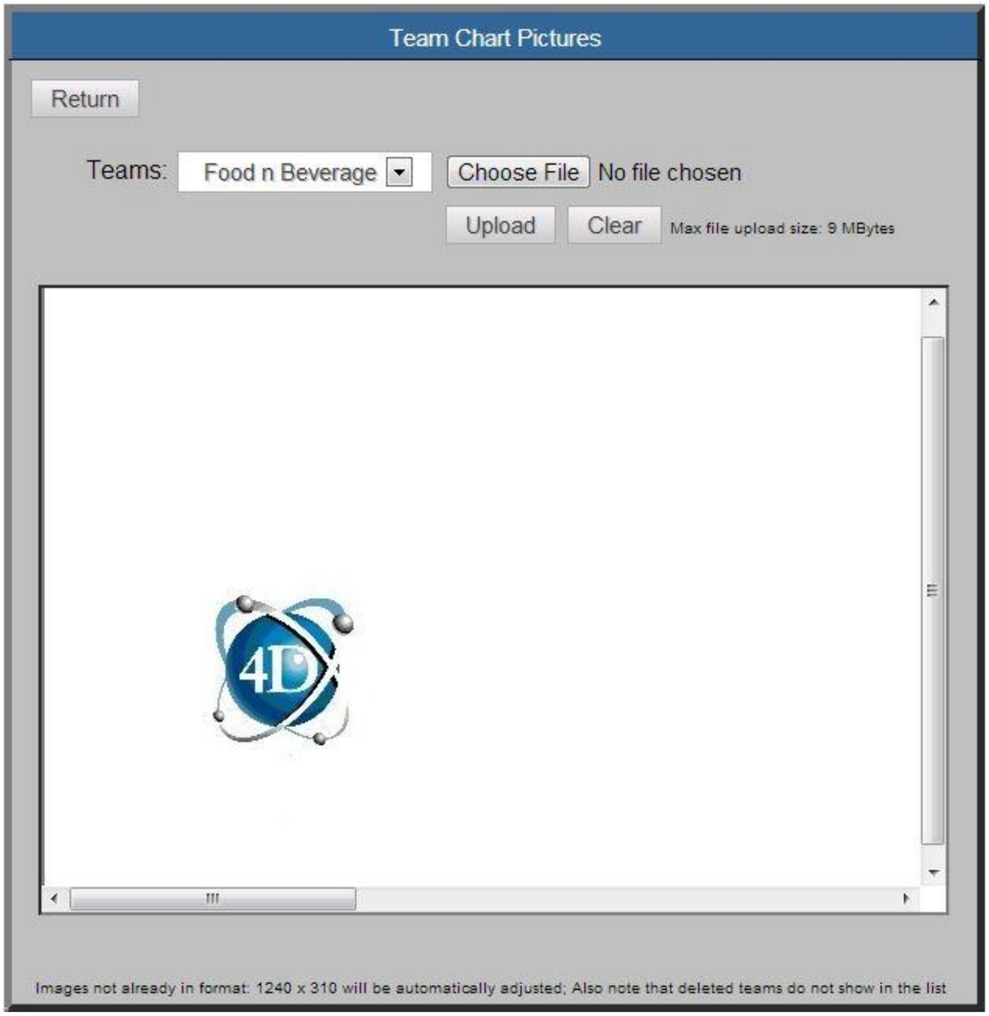
The "Default Page" tab allows administrators to upload a default page for the company being edited. The "Choose File" button opens a standard local machine file dialog box to select a default page file. "Upload …" replaces the default page with the selected file, and "Return" returns to the "Edit Company" page.

2.2.4: Corporate Logo



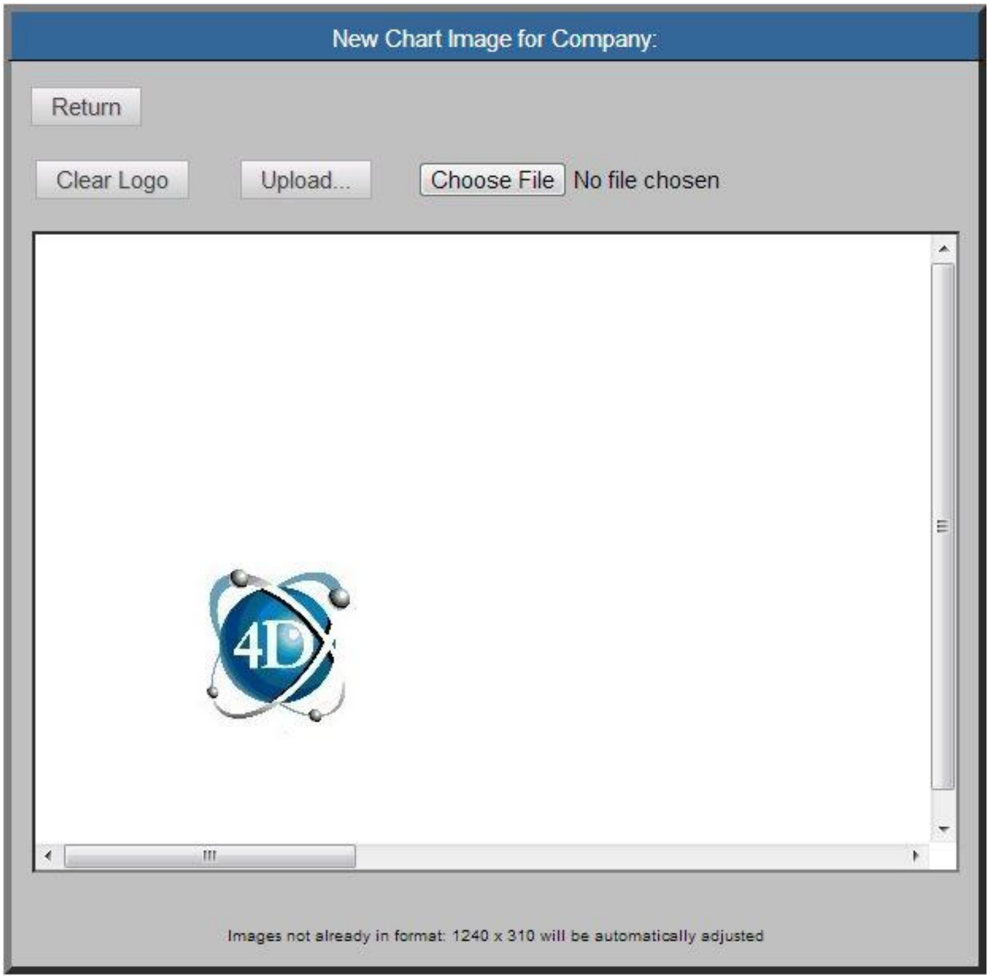
The “New Logo” tab allows administrators to upload a company logo. This operation is the same as for the “Default Page” tab.

2.2.5: Team Chart Images



The "Team Chart Images" tab is used to upload images for individual teams. Files should be 1240 x 310 pixels. Images that are not that size are adjusted. The "Teams" drop-down box allows selection of the desired team. The file upload process works the same as in previous tabs.

2.2.6: Company Chart Images



The "Company Chart Images" tab is used to upload images for company charts. As in the "Team Chart Images" tab, files should be 1240 x 310 pixels. Images that are not that size are adjusted. The file upload process works the same as in previous tabs.

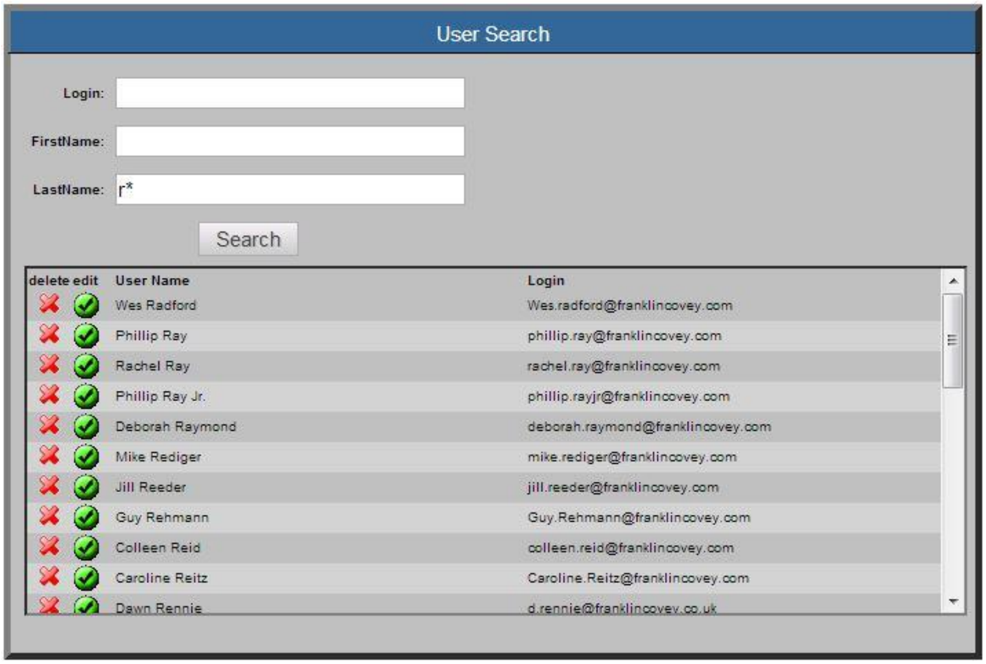
2.3: USERS

The USERS tab has seven drop-down menu items:

- Search
- Locked Out Users
- Add
- Mass Add
- Search Invitations

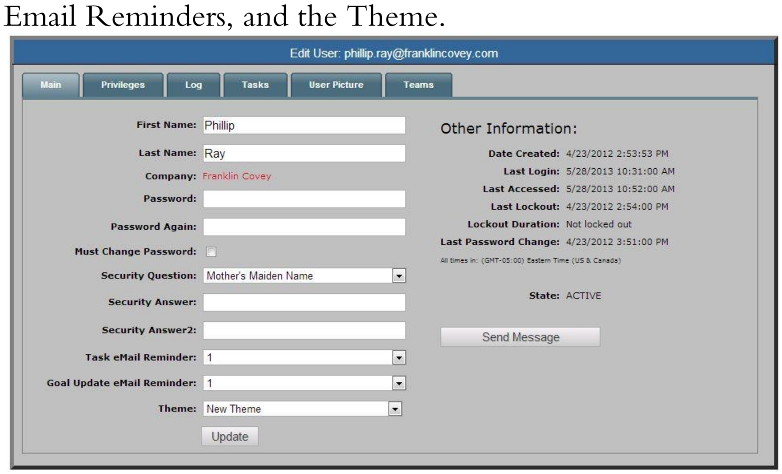
- Add Invitation
- Privileges

2.3.1: Search



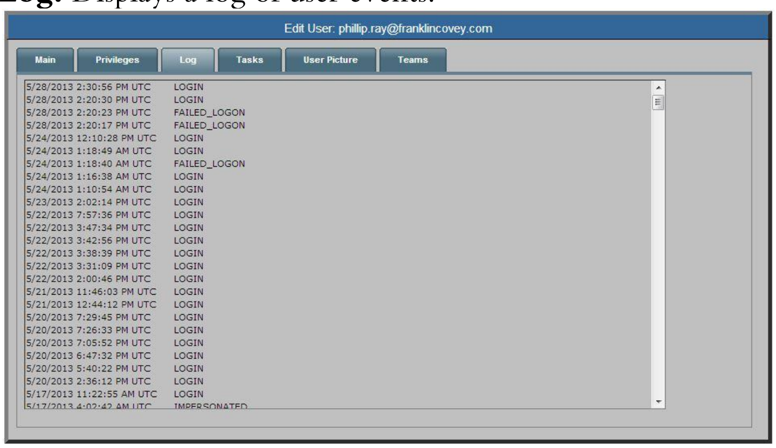
User search works the same throughout the system. Users can be searched (with wildcards) using the "Login," "FirstName," and "LastName" fields. Clicking the red "X" next to a user name deletes that user. The "Edit" button links to the "Edit User" page, which has the following tabs:

- **Main:** Provides the ability to edit basic user information; enables the administrator to force the user to change his or her password on the next login; and allows setting Task Email Reminders, Goal Update Email Reminders, and the Theme.

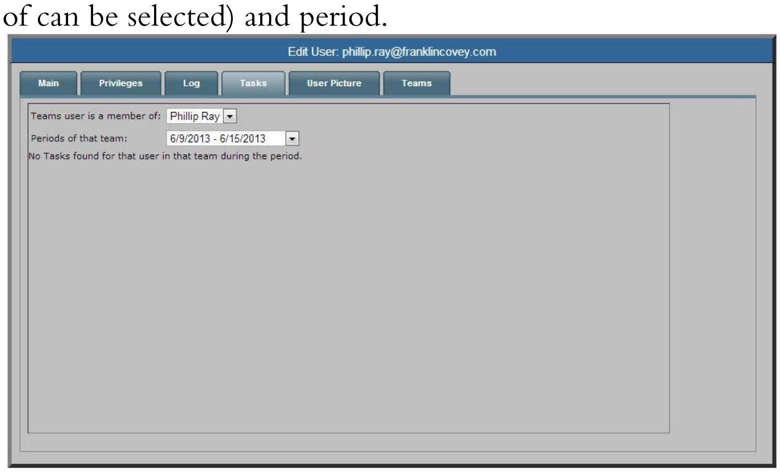


- **Privileges:** Sets user privileges to determine what user interface elements appear for the user. The user can be assigned the roles of administrator, coach, champion, or any combination. In addition, access to various reports and editing capabilities can be set for the user.

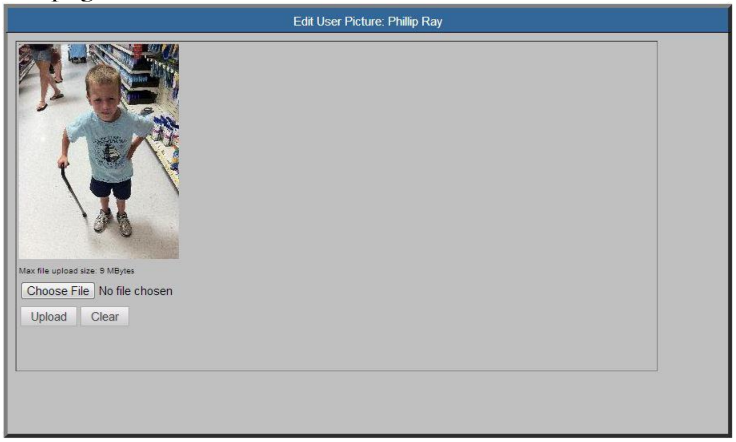
- **Log:** Displays a log of user events.



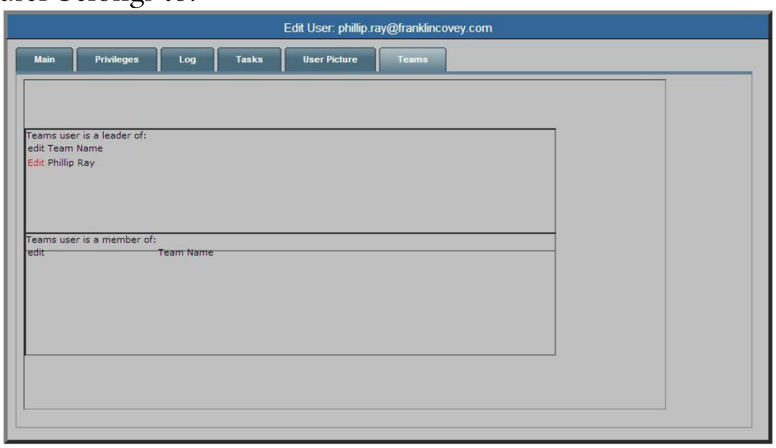
- **Tasks:** Displays user tasks by team (all teams that a user is a member of can be selected) and period.



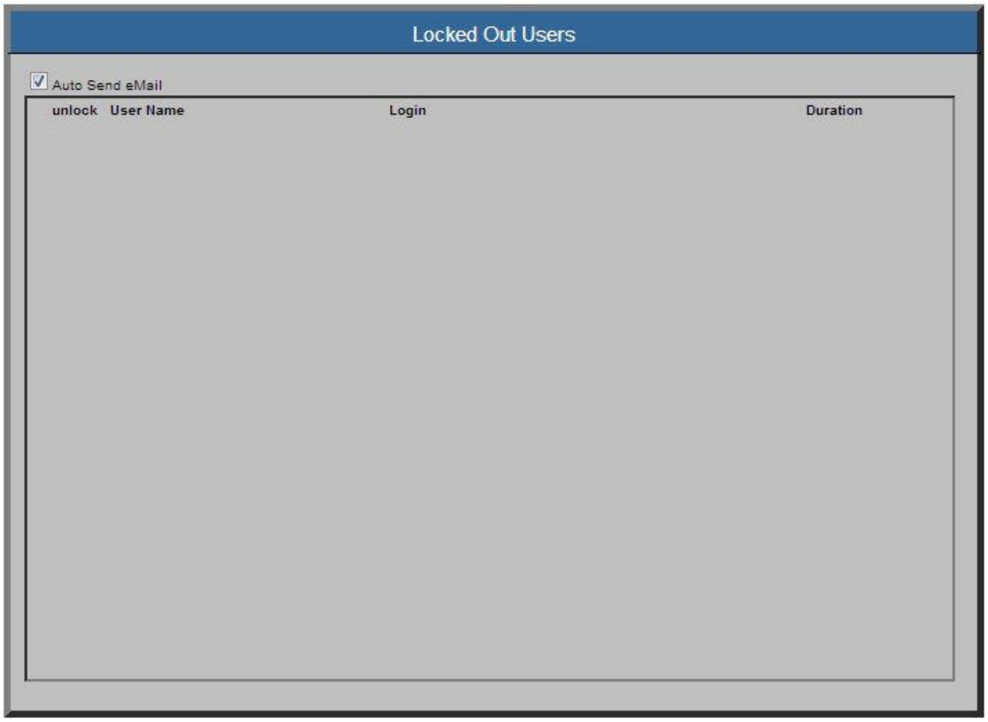
- **User Picture:** Provides the ability to change the user picture for the user being edited. NOTE: The "Edit User" tabs do not display on this page.



- **Teams:** Displays a list of teams that the user leads, and teams that the user belongs to.

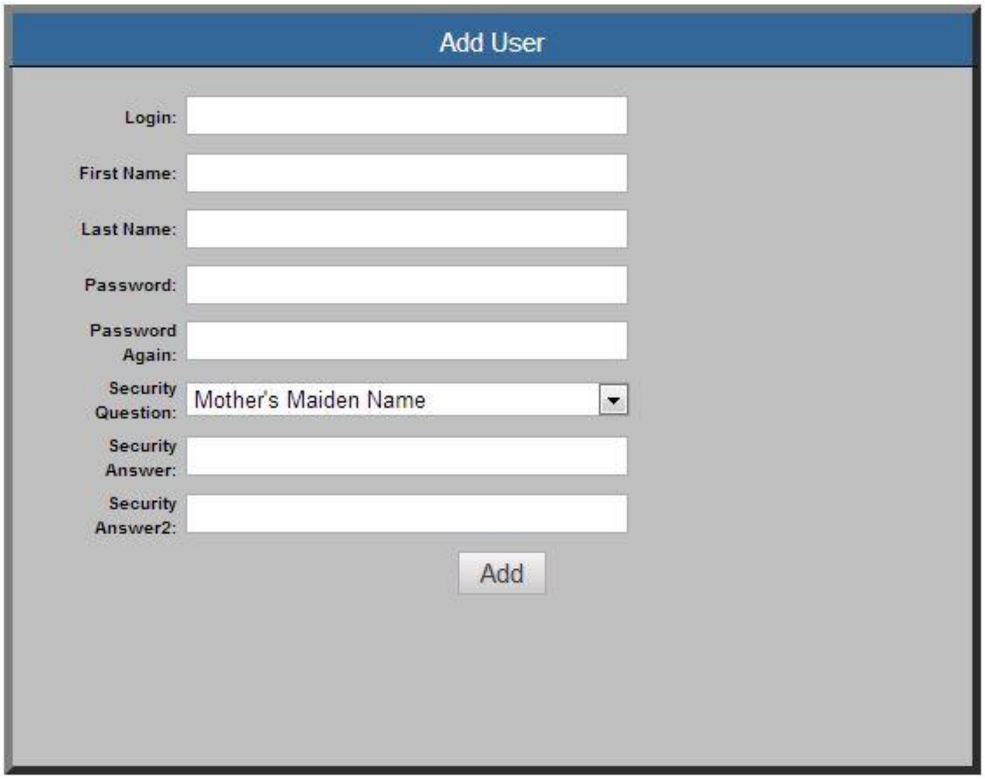


2.3.2: Locked Out Users



This screen lists all users who are currently locked out, including name, login, and duration of the lockout. It allows the administrator to unlock the user and provides the option to automatically send an email.

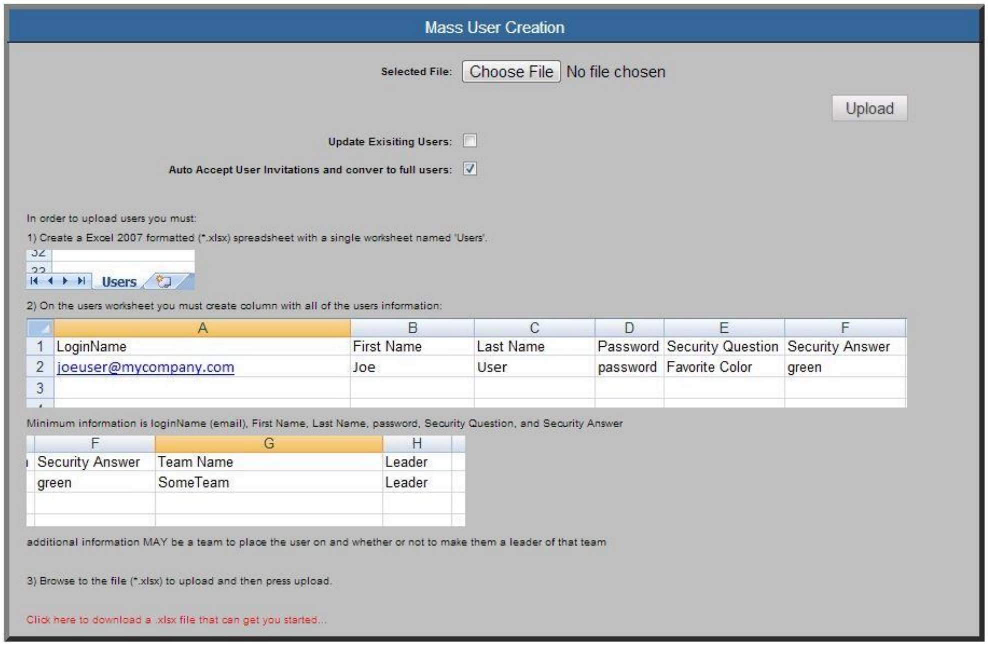
2.3.3: Add



Adding a user is not recommended in this interface, which creates a user who isn't linked to a team. It is better to add users through GOAL BUILDER where they are added as a user and to a team simultaneously.

This screen provides the functionality to directly add users. The "Login" field is the system user identifier, which must be unique. The remaining information on this page is the same as on the PERSONAL tab in the main interface. (See section 2.5 in the Application Interface section for details.)

2.3.4: Mass Add



The "Mass Add" functionality is used infrequently; it has been superseded by other options.

In many cases, it is quicker and more efficient to create a large number of users at once. The "Mass Add" page gives instructions for creating an Excel 2007 (.xlsx) spreadsheet with user information. The "Choose File" and "Upload" buttons are used to add users with the information in the spreadsheet. Checking the "Update Existing Users" checkbox modifies existing user entries (matched by the "LoginName" column) with new information from the spreadsheet. The page also contains an option to auto accept user invitations and convert them to full users.

The "Click here to download a .xlsx file" link in red at the bottom of the screen downloads a sample .xlsx file.

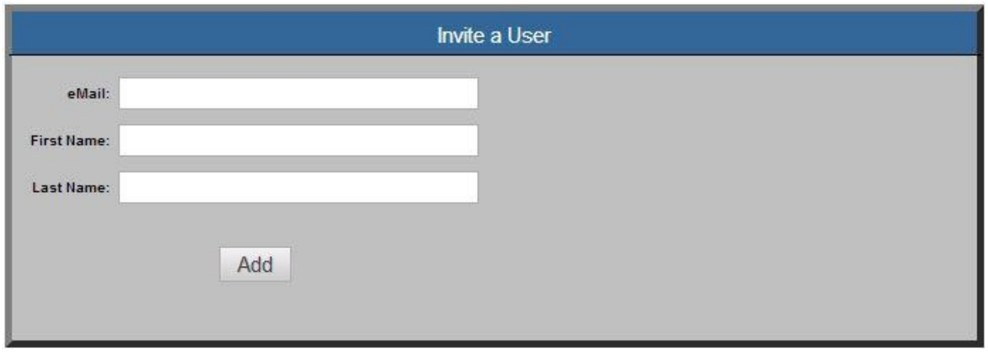
2.3.5: Search Invitations

This menu item currently links only to the Invitation Wizard. Invitations can be searched through the ADMINISTER tab in the main interface.

Note

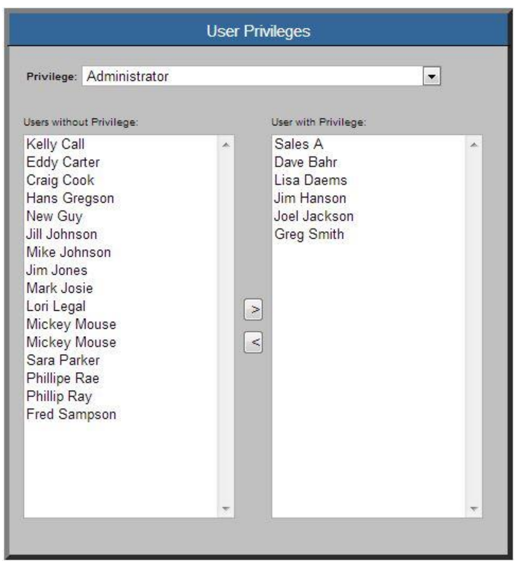
"Search Invitations," "Add Invitation," and "Privileges" are best accessed from the ADMINISTER tab in the main interface. (See section 2.6 in the Application Interface section.)

2.3.6: Add Invitation



The "Invite a User" page creates and sends a user invitation using the "Email," "First Name," and "Last Name" supplied. Pressing the "Add" button sends the user to the "Search Invitations" page.

2.3.7: Privileges



"User Privileges" provides a privilege-based method for assigning privileges to users. Selection of a privilege in the drop-down menu at the top lists all users with and without the privilege. The arrow buttons in the center column moves users between the lists.

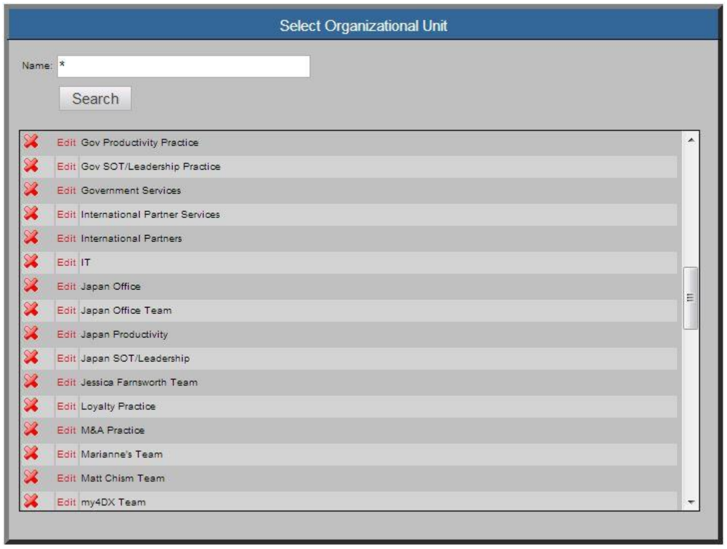
2.4: ORGANIZATIONAL UNITS

The ORGANIZATIONAL UNITS tab has two drop-down menu items:

- Search
- Add

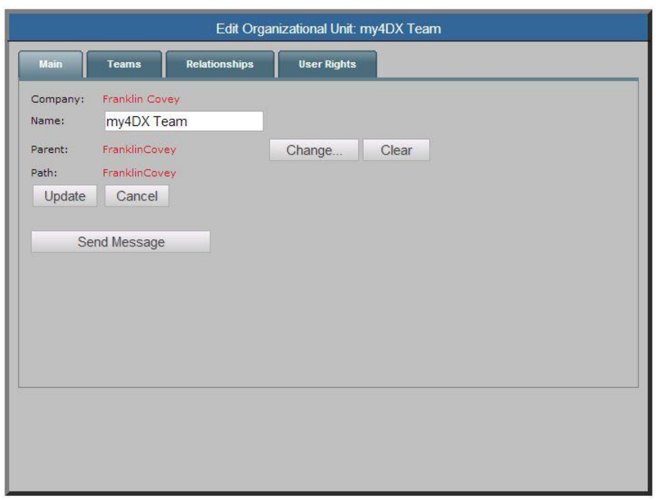
2.4.1: Search

The “Search” menu item opens the “Select Organizational Unit” page. All OUs that match the search name are listed. (Wildcards can be used.) Clicking the red “X” next to an Organizational Unit name deletes that OU.



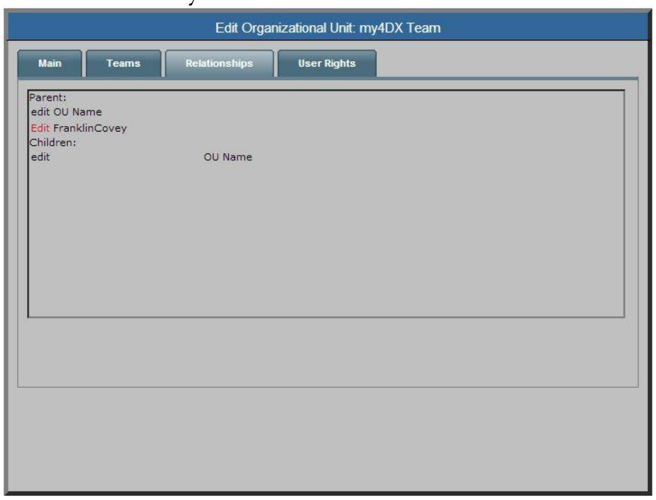
The “Edit” link next to an OU opens the “Edit Organizational Unit” page for that OU. It has the following tabs:

- **Main**: The OU Name can be edited. The parent OU can also be modified (using the “Change…” button) or cleared. This tab also provides functionality to send a message to the OU, which opens in a new window.

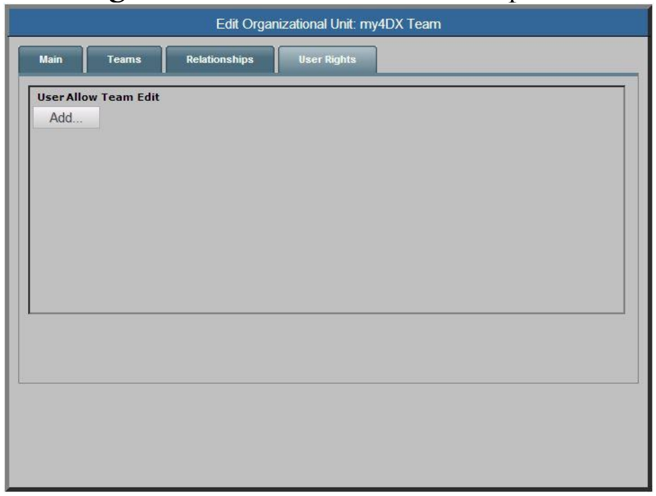


- **Teams**: Lists the teams in the OU. Teams can be deleted or edited. See section 2.5.1 for a description of the "Edit Team" functionality.

- **Relationships**: Lists the Parent OU and any Child OUs. Provides links to edit any of the OUs listed.

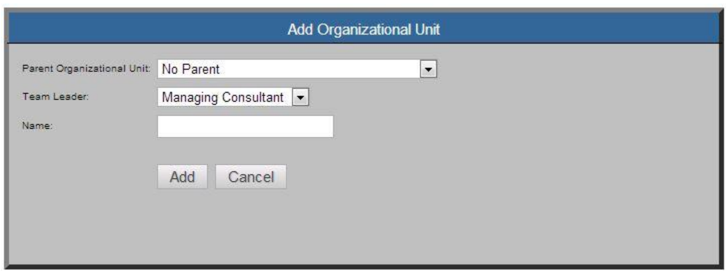


- **User Rights**: Lists the users allowed to perform team edits.



2.4.2: Add

"Add" opens the "Add Organizational Unit" page.



If "No Parent" is selected as the parent OU, the new OU is considered a top-level OU.

NOTE: Creating a new OU also creates a team with that same name in the OU and designates the person listed in the "Name" field as the team leader. Since the drop-down menu options are not listed in any particular order, it's easier to accept the default leader, then go to the GOAL BUILDER tab and either delete the team or change the leader there.

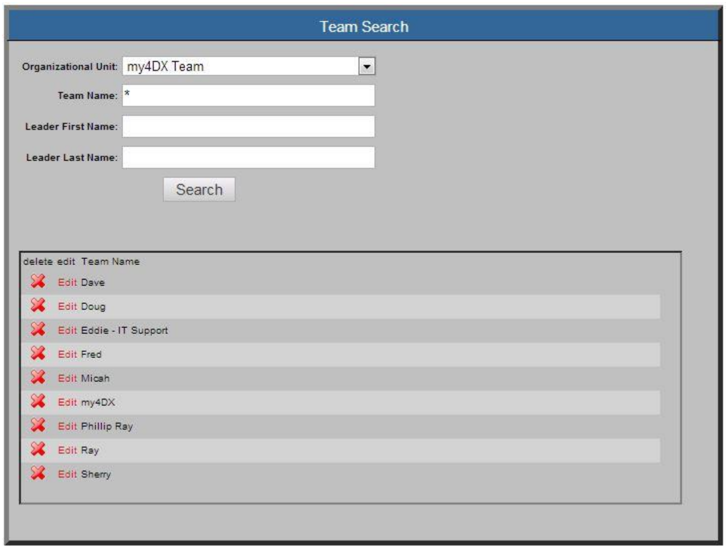
2.5: TEAMS

The TEAMS tab has two drop-down menu items:

- Search
- Add

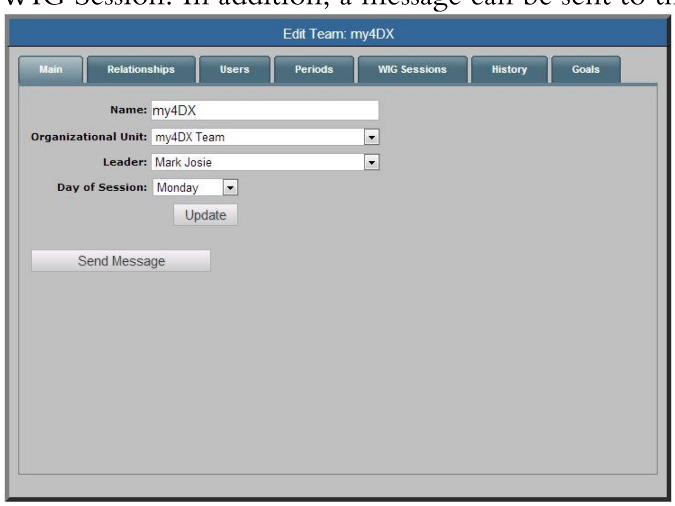
2.5.1: Search

The “Search” menu item opens the “Team Search” page. This page lists all teams in the selected OU that match the team name. (Wildcards can be used.) Teams can be searched by using the “Leader First Name” or “Leader Last Name” fields. Clicking the red “X” next to the team name deletes that team.

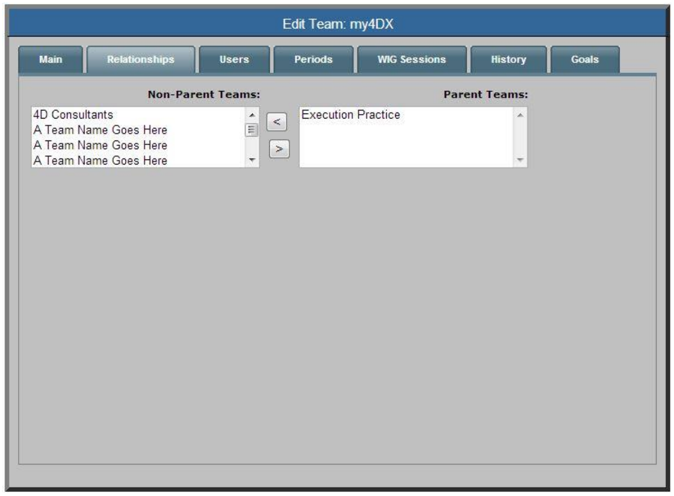


The “Edit” link next to a team name opens the “Edit Team” page for that team. The “Edit Team” page has the following tabs:

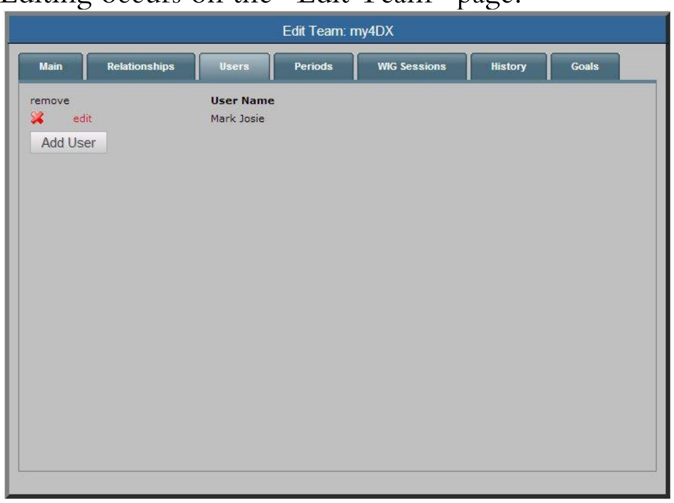
- **Main:** The “Main” tab allows editing the team name, the OU for the team, the team leader’s name, and the day of the week of the WIG Session. In addition, a message can be sent to the entire team.



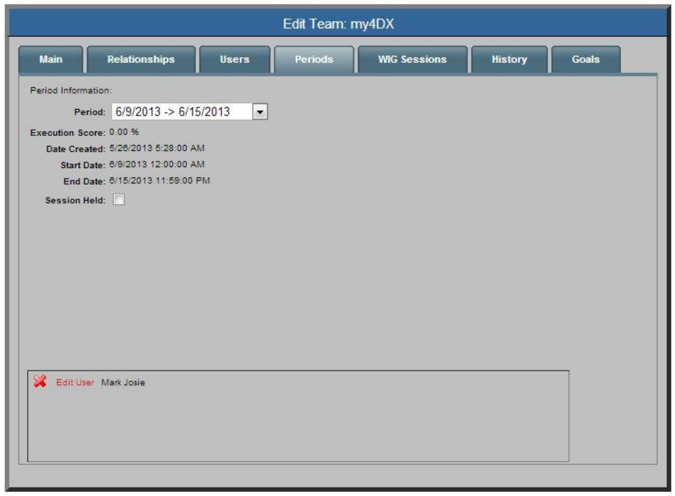
- **Relationships:** Indicates where the team resides in the team tree structure. Other teams can be assigned as parent teams using the arrow buttons.



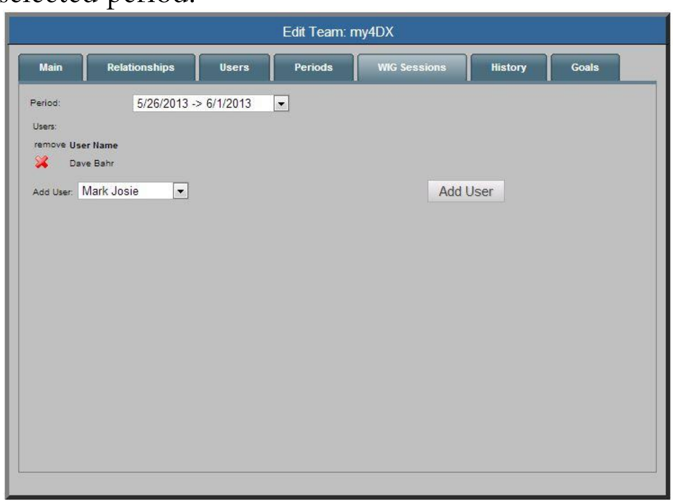
- **Users:** Lists all the users in the team and allows editing and deleting. Editing occurs on the "Edit Team" page.



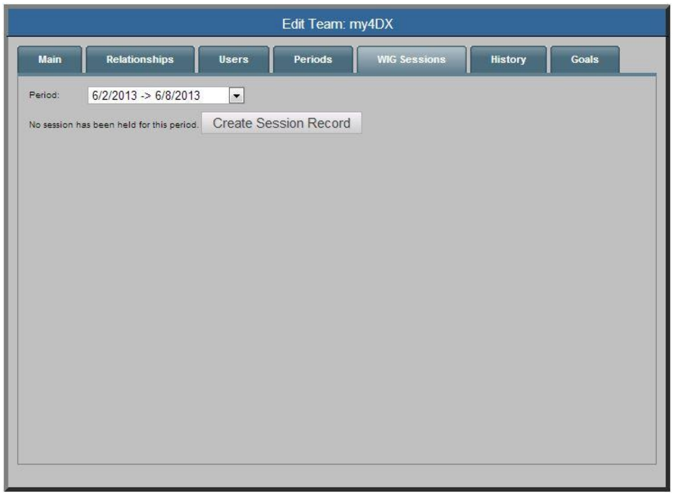
- **Periods:** Displays team information for the period selected. Information includes execution score, date information, whether or not a WIG Session was held, and a list of users.



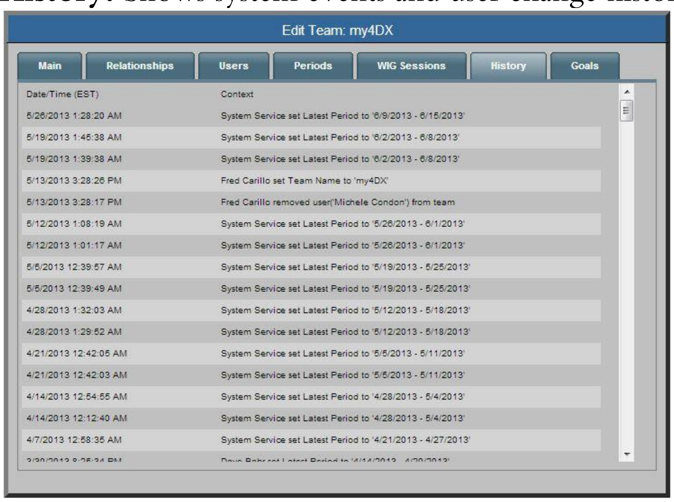
- **WIG Sessions**: Shows the attendees at WIG Sessions for the selected period.



If there are no attendees for the WIG Session, a Session Record can be created for the WIG Session, as shown below.



- **History:** Shows system events and user change history for the team.



- **Goals:** Lists all team goals (which can be filtered using the checkboxes at the top) including normal, deleted, or retired goals. Clicking the "Edit" link next to a goal opens the "Edit Goal" page.

(See section 2.6.1 in this section for details.)

2.5.2: Add

"Add" opens the "Add Team" page.

NOTE: The GOAL BUILDER interface for adding teams is more visual and easier to use. Adding teams with the GOAL BUILDER interface is recommended.

2.6: GOALS

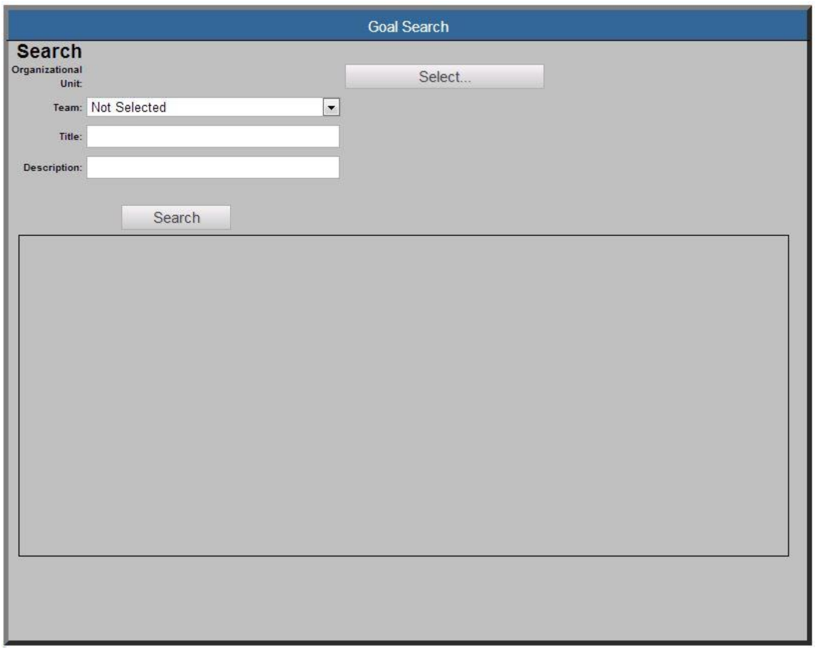
NOTE: This functionality is now in GOAL BUILDER, except for possibly the "log" function, which is rarely used.

The GOALS tab has two drop-down menu items:

- Search
- Mass Update

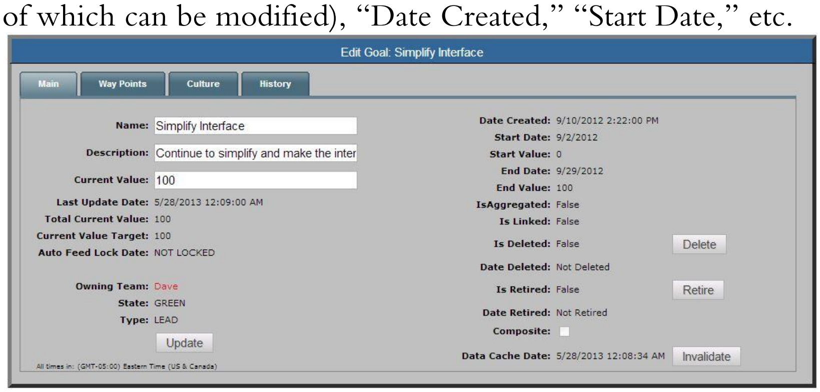
2.6.1: Search

The “Search” menu item opens the “Goal Search” page, which lists all goals in the “Team” drop-down selection that match the goal title. (Wildcards can be used.) Optionally, the “Team” drop-down box can be limited to one OU by selecting an OU with the button at the top of the page. Goals can be searched by description as well.

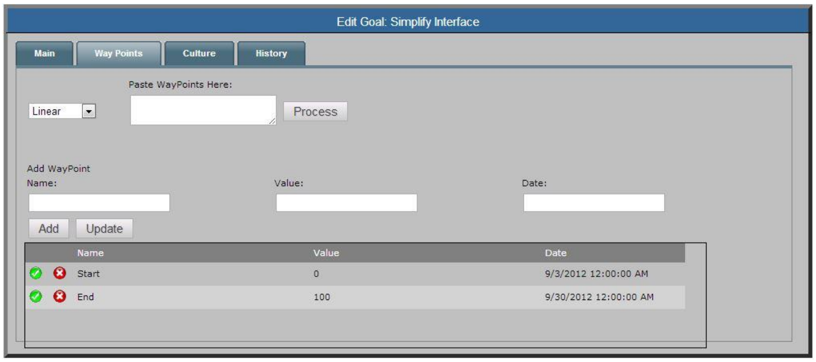


Clicking on a goal name opens the “Edit Goal” page in a new window. The “Edit Goal” page contains the following tabs:

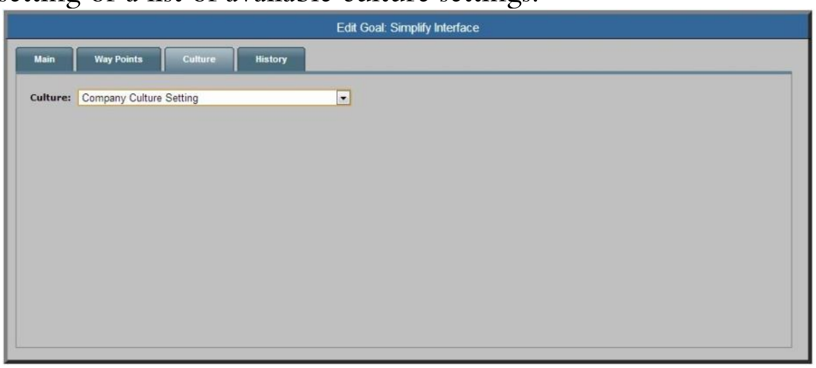
- **Main:** Contains text boxes for editing goal information, including “Name,” “Description,” and “Current Value.” In addition, it displays goal information including “Date Deleted” or “Date Retired” (both of which can be modified), “Date Created,” “Start Date,” etc.



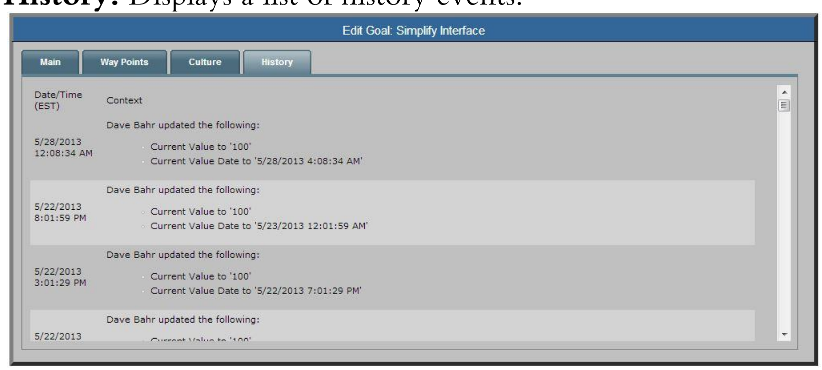
- **Waypoints:** Lists currently defined Waypoints and provides the ability to add Waypoints either by pasting Waypoint data or manually entering information into the Waypoint "Name," "Value," and "Date" fields.



- **Culture:** Can be selected from either the company default culture setting or a list of available culture settings.

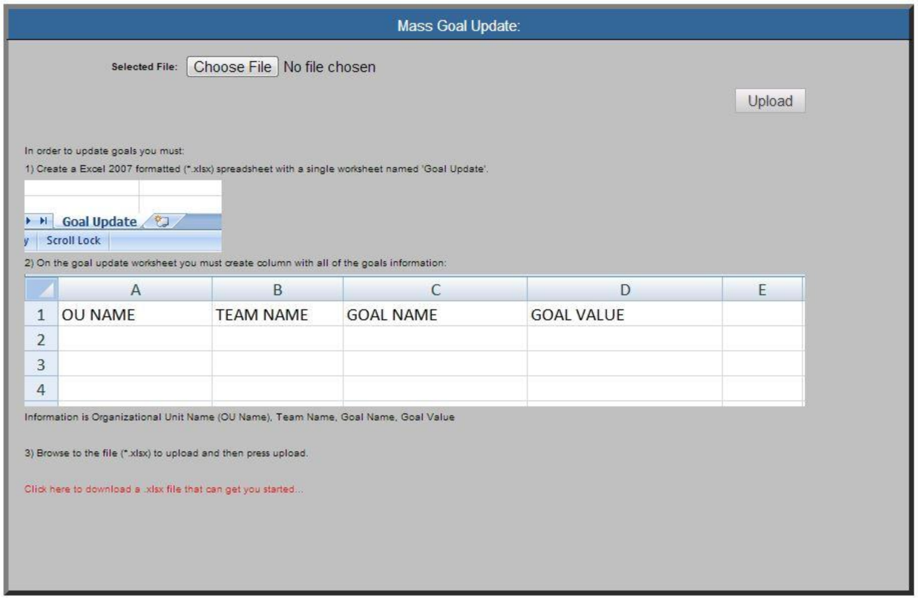


- **History:** Displays a list of history events.



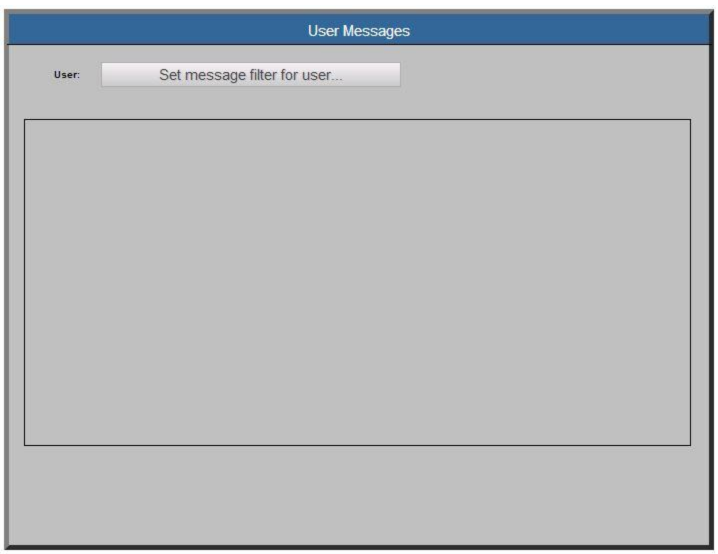
2.6.2: Mass Update

"Mass Update" opens the "Mass Goal Update" page, which gives instructions for uploading a spreadsheet file to mass-create goals.



2.7: MESSAGING

The MESSAGING tab opens the "Messaging" page.



2.8: LOGOUT

Clicking the LOGOUT tab logs out the user and returns him or her to the Login page. (See section 1: My4DX Login Page in the Application Interface section.)

Site Update (Excel) Workbook

The Site Update (Excel) Workbook is designed to facilitate rapid creation of an organization as well as all the subsidiary information required to track that organization within My4DX.

The Site Update Workbook contains nine worksheets:

- Instructions
- Users
- Organizational Units (OU)
- Teams
- Team Members
- Goals
- Waypoints
- Controls
- Drop-down List

A description of each worksheet follows.

1: Instructions

The Instructions worksheet is not processed with the rest of the workbook. It contains only instruction text in the cells of the worksheet, as well as a link to an instructional video in the My4DX Learning Library.

Instructions

Each worksheet will process separately, starting with users, then OU and so forth

The Users will be processed first so the list of users is established

To assign a person as a leader of the team, on the "Teams" tab, include the email address as the leader

To assign people to teams as 'members of the team' use the "Team Members" tab, but note the warning below.

Warning about adding people to teams:

The most common mistake made is to add a person as a member of the team and have that same person the leader of a sub-team. Because leaders of sub-team automatically attend the wig session of their parent team, they do not need to be added to the parent team.

The last two worksheets are used to define default settings for the processing of the data on the various worksheets

Video Link Explaining the spreadsheet:

https://my4dx.com/library/videos/Spreadsheet/index.html

Instructions | Users | OU | Teams | Team Members | Goals | Waypoints | Controls | drop down list

2: Users

The User Creation/Update worksheet is the entry point for all new user information.

NOTE: The information on this sheet is the same as in the Mass User Creation spreadsheet, section 2.3.4, except that Mass User Creation also includes the security question and answer.

User Creation / Update

First Name	Last Name	EMAIL ADDRESS	Password

EXAMPLE:

First Name	Last Name	EMAIL ADDRESS	Password
Sally	Smith	dave.smith@acme.com	acme
Kevin	Anderson	kevin.anderson@acme.com	acme
Mike	Kelley	mike.kelley@acme.com	acme
Keith	Jackson	keith.jackson@acme.com	acme
Mike	Crosby	mike.crosby@acme.com	acme
Chris	Denny	chris.denny@acme.com	acme

Instructions

The email address identifies a person. To assign a person to a team you will just specify the email address

The email must be unique in the entire system

If the email is found to exist in your company already, then the name will be updated and password changed

You can create all the users for the company on this page

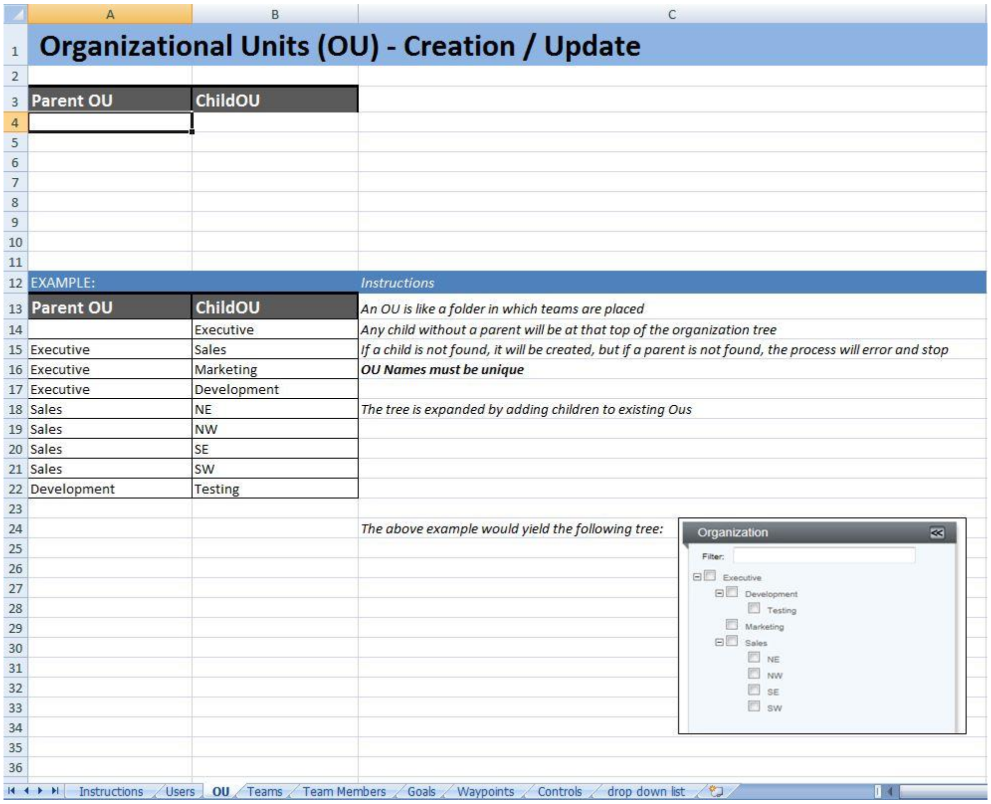
Instructions | Users | OU | Teams | Team Members | Goals | Waypoints | Controls | drop down list

3: Organizational Units (OU)

Note

OUs are created by the "Child OU" column. The "Parent OU" column defines the tree structure only. Therefore, each OU in the "Child OU" column must be unique, and each OU in the "Parent OU" column must refer to an OU created in the "Child OU" column, but does not need to be unique.

The OU Creation/Update sheet provides the ability to create a tree structure of OUs. The "Parent OU" column of the root OU should be left blank, since the root OU has no parent. Each OU listed in the "ChildOU" column is created with a parent as defined by the "Parent OU" column for that child. The OU sheet has an example of the tree structure created for a sample OU structure.



4: Teams

The Team Creation/Updates sheet creates the team structure for each OU. The first column for each team is the OU that contains the team, which is labeled "Parent Folder (OU)." Every team must have an associated OU. The teams are created from the "Team Name" column, and the team tree structure is defined by the "Parent Team" column. The root team in each OU does not have a parent team.

Team names must be unique within each OU. (However, different OUs can have teams with the same name.) An example of the resulting team tree for sample data is shown at the bottom of the sheet.

Team Creation / Updates

Parent Folder (OU)	Parent Team	Team Name	Leader's Email Address

EXAMPLE:

OU	Parent Team	Team Name	Leader's Email Address	Instructions
Executive		Main Executive	jim.hansen@acme.com	If a team does not have a parent, then it will be a 'top team' in the OU. All teams must be in an OU
Executive	Main Executive	Special Projects	phillip.ray @acme.com	The leader of a child team will attend the WIG Session of of the parent team
Marketing	Main Executive	Tom's Team	tom.jones@acme.com	The parent team can be in a different OU
Marketing	Tom's Team	Dave's Team	dave.smith@acme.com	If a parent team does not exist, then there is an error and processing stops
Sales	Main Executive	Overall Sales	greg.smith@acme.com	**Team names must be unqiue within the OU**
Development	Main Executive	Main Development Team	doug.hilton@acme.com	
Development	Main Development Team	Project One	stephen.decker@acme.com	
Development	Main Development Team	Project Two	sam.anderson@acme.com	

The above table would create:

5: Team Members

The Team Member Assignments sheet assigns team members (using their unique email identifier) to OUs and teams. Each user to be assigned should have an OU and team name listed.

NOTE: The OU and team combination must exist or processing stops.

Team Member Assignments

OU	Team Name	Member's Email Address

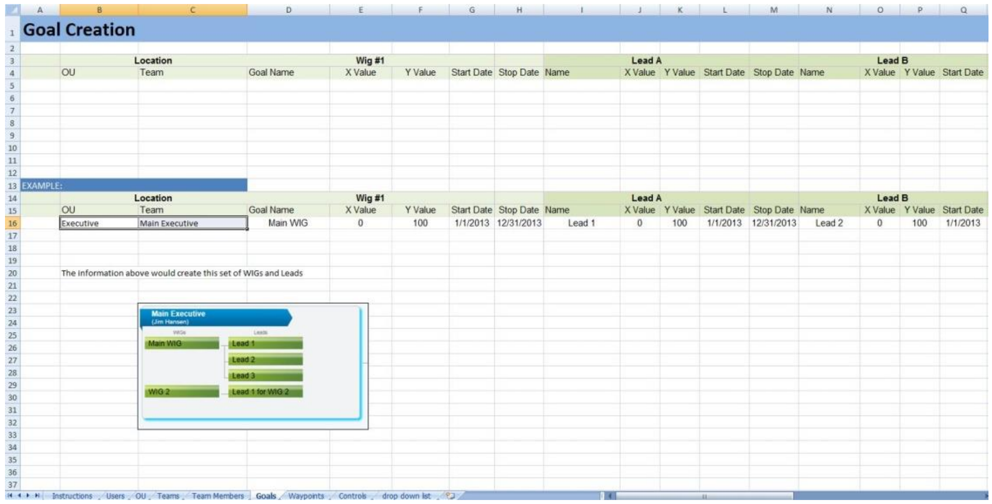
EXAMPLE:

OU	Team Name	Member's Email Address	Instructions
Executive	Main Executive	dave.smith@acme.com	WARNING: Do not add a person to a team that is the leader of a 'child team'. This will cause the person to appear twice in the session
Executive	Special Projects	kevin.anderson@acme.com	
Executive	Special Projects	mike.kelley@acme.com	The team must exist or this will error and processing will stop
Development	Project One	keith.jackson@acme.com	
Development	Project One	mike.crosby@acme.com	
Development	Project Two	chris.denny@acme.com	

Instructions / Users / OU / Teams / Team Members / Goals / Waypoints / Controls / drop down list

6: Goals

The Goal Creation sheet is for the creation of WIGs and Leads. For each team (defined by its OU and team), two WIGs—each with three Leads—can be created. Each WIG and Lead has a Name, X Value, Y Value, Start Date, and Stop Date. An example is displayed at the bottom of the sheet.



7: Waypoints

The Waypoint Creation Sheet provides for the creation of Waypoints. The sheet defaults to five Waypoints, but is not limited to that number.

Waypoints are defined for a particular goal (defined by the OU/Team/Goal combination) and a particular date. If the "Replace Existing Waypoints" flag on the Controls sheet is TRUE, Waypoints with the same date as an existing Waypoint will update the Waypoint. If the date is not found, it always creates a new Waypoint.

Additional instructions and a sample description are located at the right edge of the sheet.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	**Waypoint Creation**																
3			**Location**		**Step**		**Waypoint 1**			**Waypoint 2**			**Waypoint 3**			**Waypoint 4**	
4		OU	Team	Goal Name	Step	Name	Value	Date	Name	Value	Date	Name	Value	Date	Name	Value	Date
14	EXAMPLE:																
15			**Location**		**Step**		**Waypoint 1**			**Waypoint 2**			**Waypoint 3**			**Waypoint 4**	
16		OU	Team	Goal Name	Step	Name	Value	Date	Name	Value	Date	Name	Value	Date	Name	Value	Date
17		Executive	Main Executive	Main WIG	N	Mid1	50	2/1/2013	Mid2	90	6/1/2013						
18				Lead 1	Y												
19				Lead 2	Y	Mid1	50	2/1/2013	Mid2	55	6/1/2013	Mid3	60	9/1/2013			

Instructions / Users / OU / Teams / Team Members / Goals / **Waypoints** / Controls / drop down list

8: Controls

The Controls sheet should not be modified by users. It sets default values for Yellow Tolerance, Red Tolerance, Goal Description, Boundary, Security Question, and Security Answer. In addition, the "Replace Existing Waypoints" row affects the operation of the Waypoints sheet, as described on the Waypoints sheet itself.

	A	B	C
1	**[INTERNAL USE ONLY]**		
2			
3			
4	Goal Availability Date:	1/1/2013	
5	Yellow Tolerance:	0	
6	Red Tolerance:	3	
7	Goal Description:	:n will move from :x to :y by :e	
8	Boundary:	Meets Or Exceed	
9	Default Security Question	Favorite Color	
10	Default Security Answer	red	
11	Replace Existing Waypoints	FALSE	
12			
13			
14			

9: Drop-down List

This list sets the values of drop-down lists elsewhere in the workbook. This sheet should not be modified by users.

	A	B	C	D	E
1	**[INTERNAL USE ONLY]**				
2					
3					
4	Drop Down for Goal Boundary Defaults				
5	Meets Or Exceed				
6	Not To Exceed				
7					
8	Drop down for Controls Yes/No				
9	Yes				
10	No				
11					
12	Drop down secuirty question				
13	Mother's Maiden name				
14	Favorite Pet Name				
15	Birth City				
16	Favorite Color				
17					

Technical Support Issues

1. General Issues

1.1: UNDERSTANDING WHO IS ON A TEAM

Issue: Users sometimes appear on a team twice. They may not know this because they are the leader of a connected sub-team and they are explicitly listed on the team.

Resolution: The best solution is to be sure that the leader of a sub-team is not also made a member of the parent team. Alternatively, explain to the user that he or she is listed as part of the parent team, and also listed as the leader of a connected sub-team.

1.2: UNDERSTANDING THE ORDER OF PEOPLE APPEARING IN THE WIG SESSION

Issue: Users often do not understand the order that names appear in the WIG Session.

Resolution: The names displayed are based on the team selected and the user selected. It always shows the first team on the user's list first, and the first person on the selected team's list first. It does not default to show the user's own name first. On subsequent logins, the display defaults to the team selected last, but it does not default to the user's name first.

To change the order in which names are displayed, the user must go to the GOAL BUILDER tab (see section 2.4 in the Application Interface section), use the "Edit" button, and then go to the "Members" tab.

1.3: UNDERSTANDING THE ORDER OF GOALS IN THE WIG SESSION

Issue: Users may not understand goal ordering in the WIG session.

Resolution: To change the order in which goals are displayed, the user must go to GOAL BUILDER (see section 2.4 in the Application Interface section), use the edit button, and then go to the "Goals" tab and use the arrows next to the goals to move them up and down the list.

1.4: INVITING OTHERS TO JOIN A TEAM VS. ADDING OTHERS DIRECTLY TO A TEAM

Issue: What is the difference between inviting a team member and simply adding him or her?

Resolution: Sending an invitation sends them an email with a link (see section 2.6.4 in the Application Interface section). Adding a user is the process of directly putting in new user information, and then simply sending the new user the necessary login information. There's more than one way to add a member to a team (for example, "Add Member" in GOAL BUILDER) or create a sub-team that he or she leads. That person is automatically on the parent team.

Note

There's more than one way to add a member to a team. In GOAL BUILDER you can add a member or create a sub-team that he or she leads. That person is automatically on the parent team.

1.5: INTO WHICH WEEK SHOULD A COMMITMENT BE MADE?

Issue: Users sometimes have difficulty determining into which week they should place a commitment: the week the commitment is made, or the week the commitment is due.

Resolution: Commitments should be placed in the week that the commitment is due. In the two-week view, the left is the current week, right is the next week. To prep for a WIG Session, the user checks off the current commitment on the left and makes a new commitment for the following week.

1.6: WHAT SHOULD BE DONE BEFORE A WIG SESSION STARTS AND WHAT SHOULD BE DONE DURING A WIG SESSION?

Issue: General steps to take for a WIG Session.

Resolution: There are several common steps to take to prepare for and participate in a WIG Session.

Before the session:

- Update the scoreboard if the user owns it (i.e., if it's a team scoreboard)
- Select the right team
- Select the right person

During the session:

- Update any WIGs or leads the user is responsible for

1.7: SPECIFYING WHICH DAY OF THE WEEK A WIG SESSION OCCURS

Issue: Changing the day of the week for a WIG Session

Resolution: On the WIG SESSION tab, in the "Options" drop-down menu that appears above the WIG display, select "Edit Session Day."

1.8: CHANGING THE LEADER DURING A WIG SESSION

Issue: It may be necessary to change the session leader during a WIG Session.

Resolution: The new leader should use the "Make Me the Leader" button above the user photo. (See section 2.1 in the Application Interface section.)

1.9: GETTING HELP

Issue: The user is trying to find additional help.

Resolution: The primary source of help is the LIBRARY tab on the main My4DX interface. The user can watch the videos in the library, refer to any of the guides, or receive direct help by:

- Emailing to support@my4dx.com
- Calling 1-888-576-1776

2: Login Issues

2.1: CAN'T LOG IN

Issue: User can't log in to the My4DX site.

Resolution:

1. Verify the person has an account. (Be sure to check user invitations if necessary.)
2. Verify he or she is at the correct website.
3. If the company uses Single Sign On, be sure the user is not trying to log in directly to the site.
4. Verify the email address listed on the account and make sure he or she is using the correct login.

5. If none of the above, it is probably a password problem. Reset the password, use the "Forgot Password" function, or make sure the user sets a security question and answer.
6. FranklinCovey Tech Support (FCTS): Verify the company has not been disabled (e.g., canceled subscription) or on a single team site (STS), or that the trial time has not expired.

2.2: CAN'T CREATE ACCOUNT FROM INVITE LINK

Issue: The user received an email invite with a link, but the link doesn't allow him or her to create an account.

Resolution: Invites expire after one week. Look up the user invitation and resend it or accept the invitation for the user.

3. WIG Session Issues

3.1: WIG SESSION IS BLANK

Issue: The user's WIG Session is blank (no goals; nothing in team or user selection).

Resolution:

1. The account may not have been added to any teams. Add the person to the appropriate teams in GOAL BUILDER.
2. Make sure the person does not have two accounts in the system under different emails. The user may be logging in using a different account than what was added to the teams. Verify the correct account email, make sure that account is listed on the teams, and then delete the unneeded second account.

3.2: TEAMS/USERS/GOALS ORDER

Issue: How does the user change the order of the teams/users/goals?

Resolution:

- Teams always appear in alphanumeric order; this cannot be changed.
- User order and goal order can be changed using the "Team Edit" interface in GOAL BUILDER.

3.3: SIX WEEK COMMITMENT AVERAGE IS WRONG

Issue: The user believes that the Six Week Commitment Average is incorrect.

Resolution:

- The execution percentage does not include the current calendar week, so checking off current goals does not change the score.
- You may need to help the user check off goals he or she forgot to check in previous weeks. Use the Advanced Admin interface (Users->Search->Tasks tab).

3.4: COMMITMENTS NOT VISIBLE (TO USER AND/OR TEAM)

Issue: The user is unable to find his or her commitments.

Resolution: The user probably has been entering his or her commitments under the wrong person's name. Look at the other team members and see if the commitments show there.

(Unlikely cause: Something has been deleted—the team, the user's account, or goals—and then replaced with new ones.)

3.5: RETIRED GOALS VIEW ISSUES

Issue: The user does not want retired goals to appear, or wants to know when they will automatically disappear.

Resolution: Retired goals stay in the WIG Session for two weeks before disappearing into "history."

To remove them immediately, use the "Goal Views" drop-down menu on the WIG SESSION page, and uncheck the "Show Retired" checkbox.

3.6: USER NOT AVAILABLE IN SELECTED TEAM

Issue: I can select a team in "Team Selection," but my name does not appear in "User Selection" for that team.

Resolution: The account is listed as an "observer" on the team. If the name is to appear, the account must be changed.

3.7: GOALS ARE NOT CHANGING WITH COMMITMENT DATES

Issue: The goals are not changing when the user changes the dates on commitments (scrolling back and forward).

Resolution: The goals always show current data. Only the commitments change when the date ranges are changed.

3.8: TEAM LEADER UNAVAILABLE TO START WIG SESSION

Issue: What can be done if the team leader cannot start the WIG Session?

Resolution: Any member of the team can start and end a WIG Session.

3.9: SYNC ISSUES

Issue: The "sync" function of the WIG Session is not working well.

Resolution: The sync is sensitive and is easy to disconnect. A good, constant Internet connection is required.

Hints to prevent or solve sync problems:

- Do not navigate away from the WIG Session (e.g., by clicking on other teams, other members, etc.); instead, allow the screen to follow the leader.
- The user may need to click "Leave Session" and "Join Session" again to re-sync.
- The user may need to manually follow along if the sync is a consistent problem.

3.10: CHANGING COMMITMENT COLUMN DATES

Issue: Is it possible to change the dates at the top of the commitment columns?

Resolution: The date range always shows the calendar week (Sunday-Saturday). It cannot be changed. The "Due On" date corresponds to the day of the week chosen for the WIG Session. If "Tuesday" is the selected WIG Session day, then the date of the Tuesday of that week will be displayed.

3.11: CHANGING WIG SESSION VIEW

Issue: Is it possible to change the WIG Session view (e.g., two columns of commitments, details column, etc.)?

Resolution: In the "Options" drop-down menu, select "Preferences" and choose the preferred view.

3.12: DIAL VS. LINE GRAPH

Issue: In the "Details" column, why is there a "dial" graph instead of a line graph?

Resolution: If only one week of data is represented, it shows as a dial graph representing that week's data. For longer periods, the line graph shows the entire range selected.

4: Reports Issues

4.1: REPORT ACCESS PERMISSIONS

Issue: The user reports he doesn't have the option to access a report.

Resolution: Executive Scoreboard, Analysis Report, and User Reports all require special permissions to use. Permissions for these reports can be found in the "Advanced Admin" user search.

4.2: WIG AND LEAD PERCENTAGES NOT CHANGING

Issue: The user reports that the WIG and Lead percentages aren't changing in "Team Status & Executive Scoreboard" when he or she selects a different date range.

Resolution: They shouldn't change. The WIG and Lead percentages of completion are always current value. The date range changes only the commitment and WIG Session percentages.

4.3: "INFINITY" OR "NAN" IN WIG OR LEAD COLUMN

Issue: In the WIG or Lead column, there is an "Infinity" or a "NaN" message instead of a percentage.

Resolution: This means the system cannot calculate a percentage of completion for one of the goals. This is usually due to some error in goal creation. Most often it is due to a goal where the current target is 0 and the current value is reporting some number. (The system cannot calculate a percentage of completion for a goal with a target of 0.)

4.4: CAN'T RATE COMMITMENT QUALITY

Issue: In the Executive Scoreboard, user does not see the 'Message' icon and/or cannot use the commitment quality rating function.

Resolution: Both of these functions require special permissions that can be modified in the 'User' interface of the Advanced Admin functions.

4.5: INCORRECT TEAM STATUS COMMITMENT PERCENTAGES

Issue: The commitment percentages are incorrect in "Team Status & Executive Scoreboard."

Resolution: The user can click on the percentage score to open the detail for what is being included in that score. Often the user finds unchecked or missing commitments/WIG Sessions that are driving down the scores.

4.6: "COMMITMENT QUALITY" NUMBER

Issue: What does the number in the "Commitment Quality" column represent?

Resolution: That is the number of days since a coach last changed the "Commitment Quality" score for that team.

4.7: SUSTAINABILITY INDEX CALCULATIONS

Issue: How is the "Sustainability Index" calculated?

Resolution: It is the average of the "Commitments Kept," "Commitments Made," and "Sessions Held" scores.

Appendix

Error Reports

Clicking on WIG Session while a session is running changes the left panel to the stopped session view and gives you a "Join Session" button, even if you are the person who started the session. You can rejoin the session as yourself, but you do not have a "Stop Session" button—instead, you only have the option to "Leave Session."

Clicking in too many spots (about four) on the video-playback bar results in a blank white screen.

The "Copy" button on the "User Invitation" dialog box in the Invitation Creation Wizard doesn't seem to do anything.

The Add User page in the support interface seems to have some major spacing problems.

Managed to get into a "too many redirect loops" error by logging into the main interface, going to the support interface, logging out, and then trying to log back in from the redirect Login page that it sent me to.