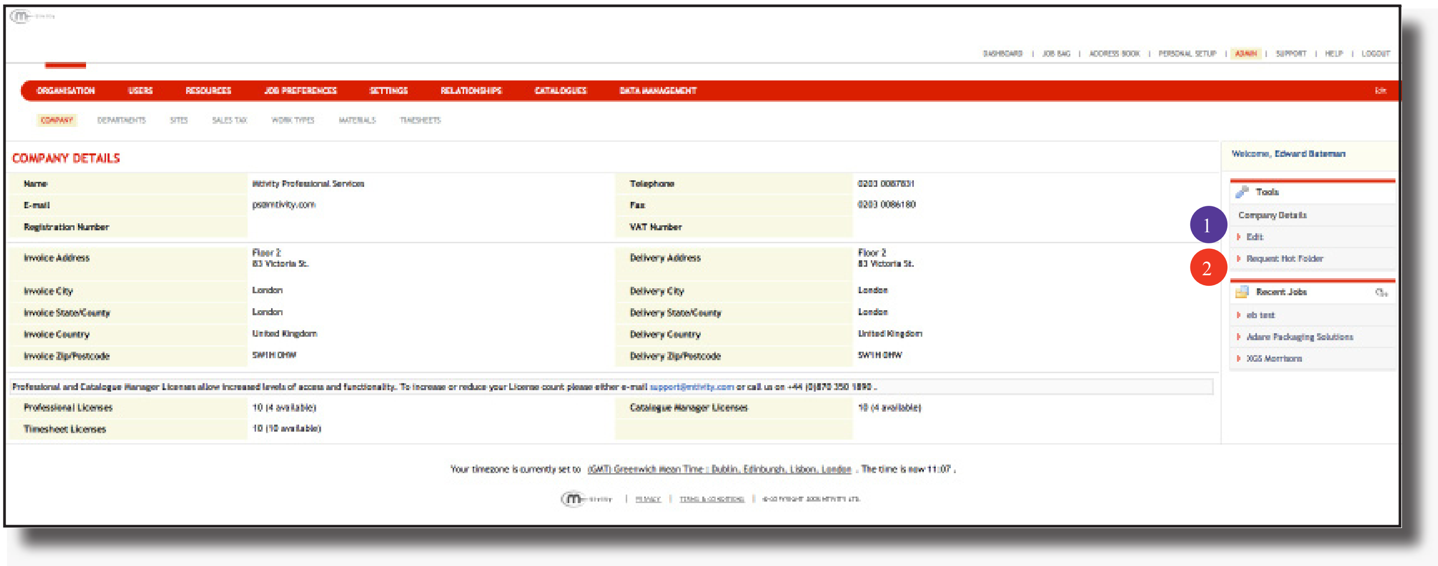
Admin: Organisation Company Details



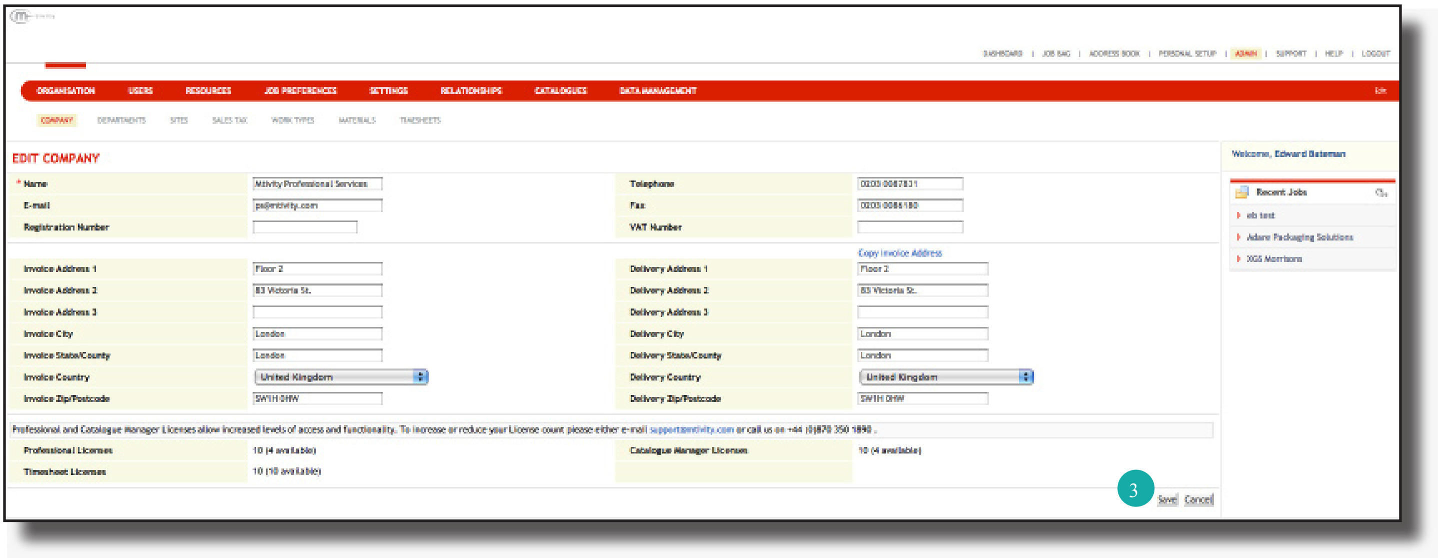
Admin > Organisations > Company

Displays the Company Details.

1. Click Tools > Edit to edit the details.
2. Click Tools > Request Hot Folder. This will send a request email to Mtivity Support. Once this email is received a Hot Folder will be created for the company with a username and password.

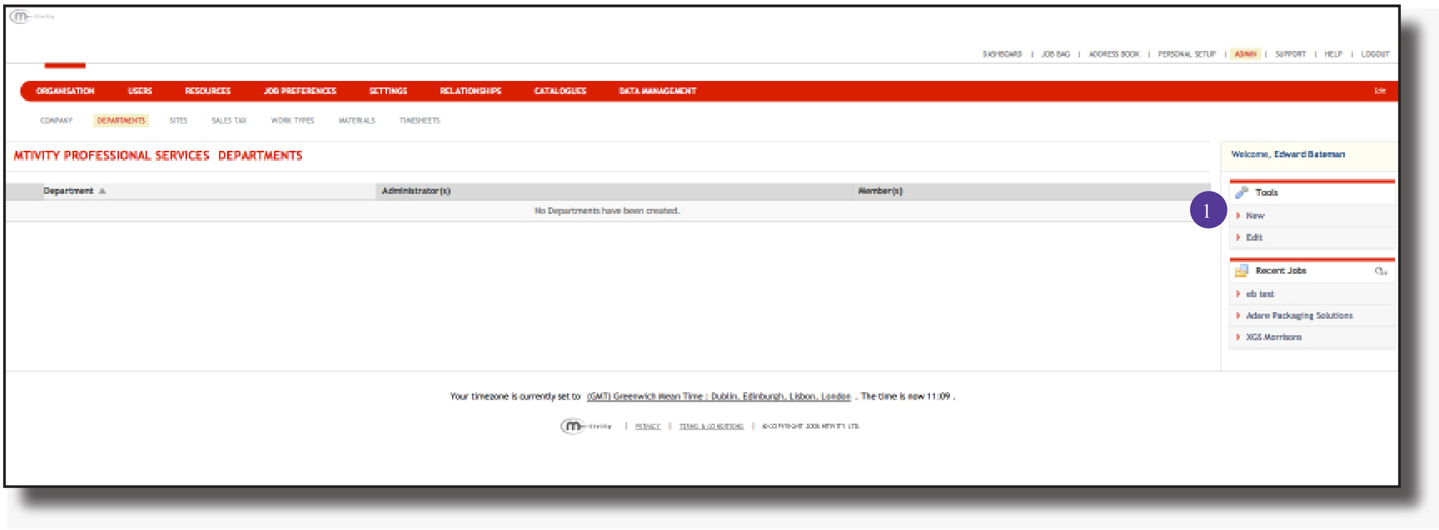
The number of licences available for the company to assign is indicated at the bottom of this page.

Edit Company Details



1. Admin > Organisations > Company > Tools > Edit
   You can now edit the company details as needed. These include Company Name, telephone number, fax number, registration number and vat number. You can also enter (or edit) the default company Invoice and Deliver Addresses.
3. Click the save button to save the changes.

Admin: Organisation Department Details



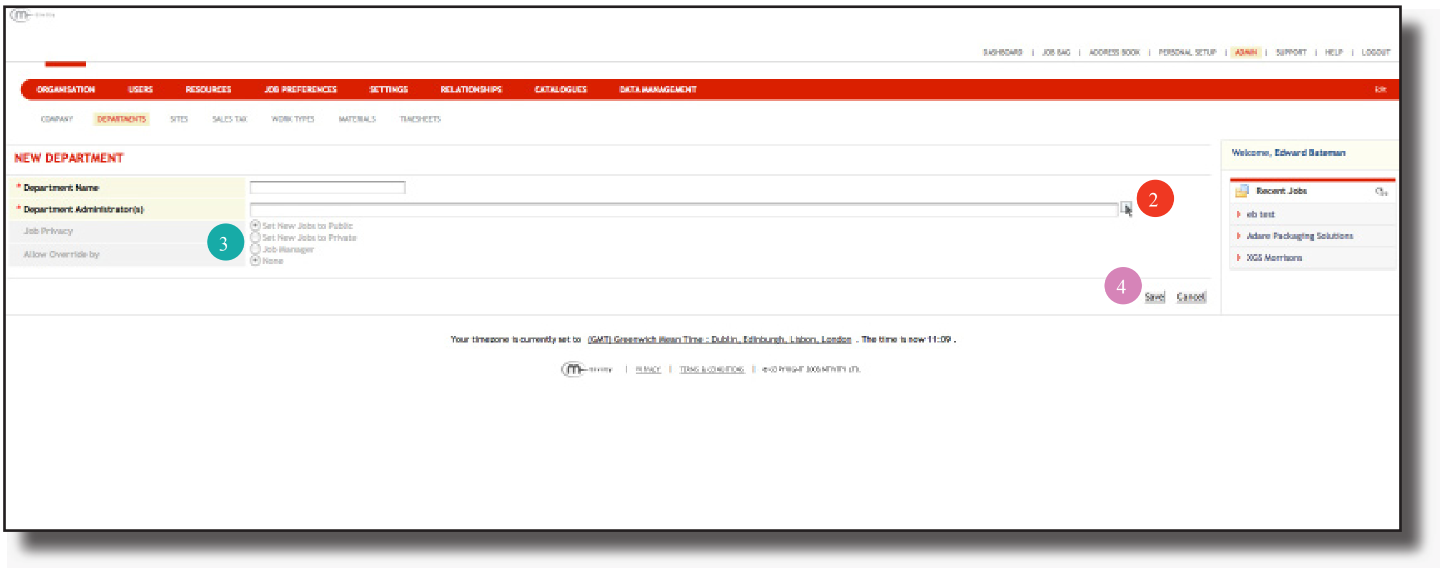
Admin > Organisations > Departments

Displays all Departments created within the company

1 Click Tools > New to create a new department.

Departments are used to group users within a company, allowing additional administration rights to senior members of the group. This allows the company hierarchy to be represented in Mtivity where Departments are used as a way of representing a departmental, regional or team structure.

New Department



1 Admin > Organisations > Departments > Tools > New

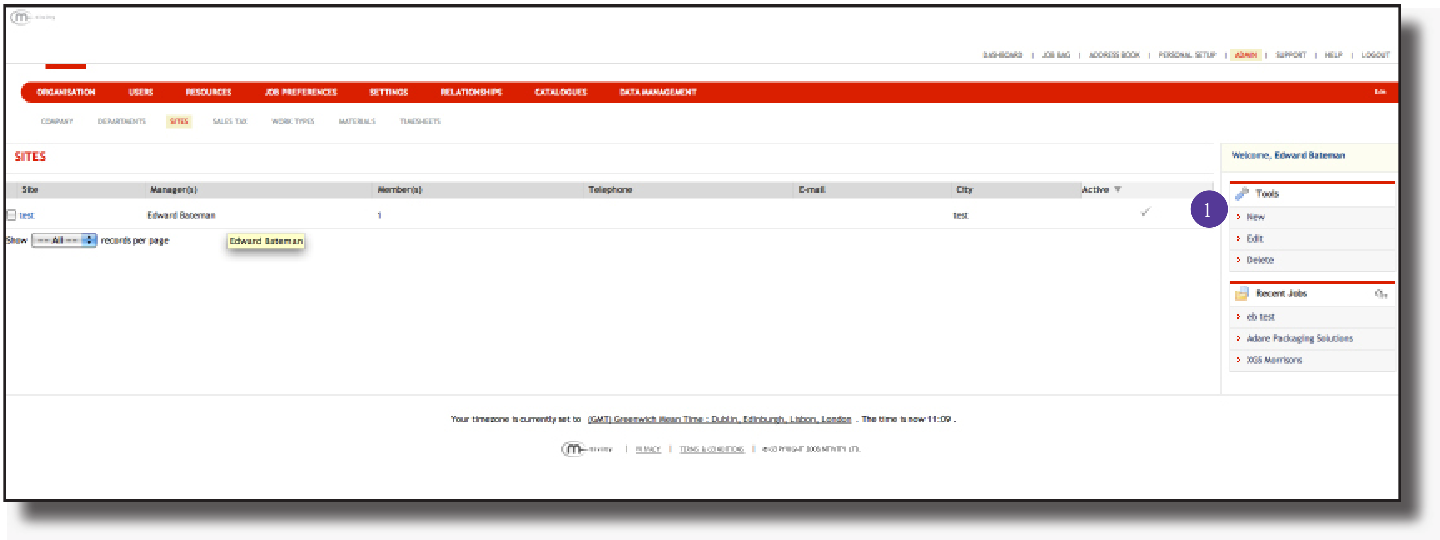
Enter in the details for the new Department. Enter in a Department Name,

2 Select the Department Administrator(s) by clicking on the Select Administrator(s) tool.

3 Job Privacy and Allow Override settings are found in Admin > Job Preferences > Job Privacy. If allowed, Department Admins can set if new jobs will be Public or Private and if the Job Manager can override this or not.

4 Click Save to save the Department.

Admin: Organisation Site Details



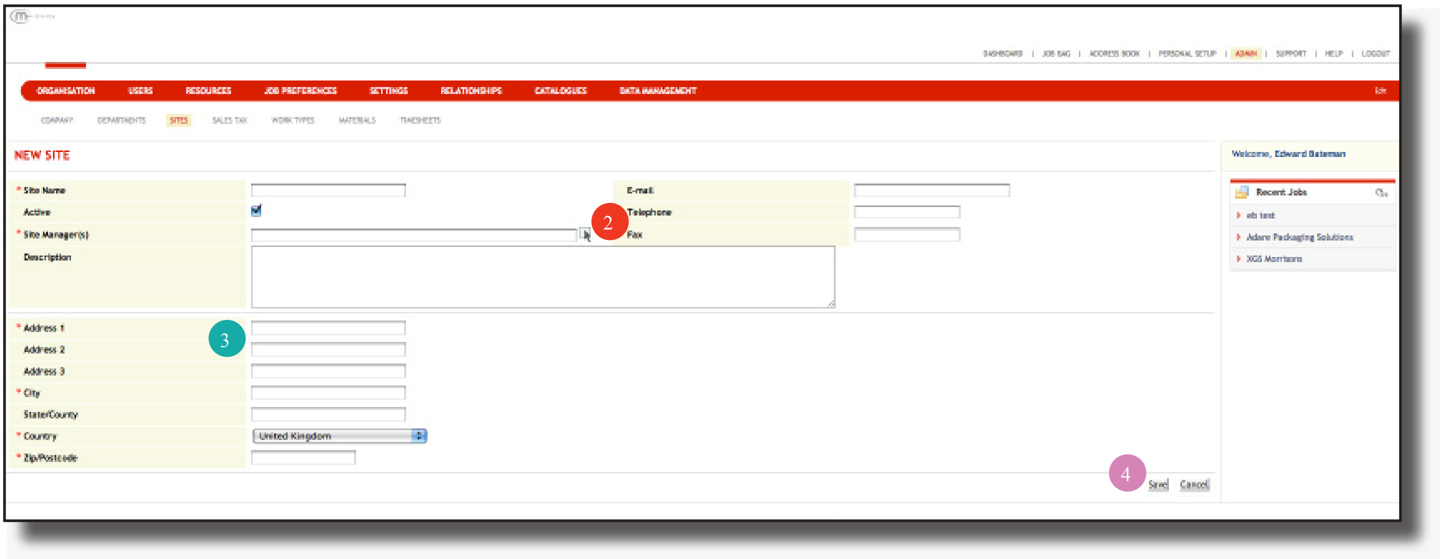
Admin > Organisations > Sites

Displays all Sites created within the company

1 Click Tools > New to create a new site.

A Site is a description of a physical location in a companies structure, storing delivery address and basic contact information against that location. Linking a user to a site sets that site to be his or her default 'Home' address within Mtivity.

New Site



1 Admin > Organisations > Sites > Tools > New

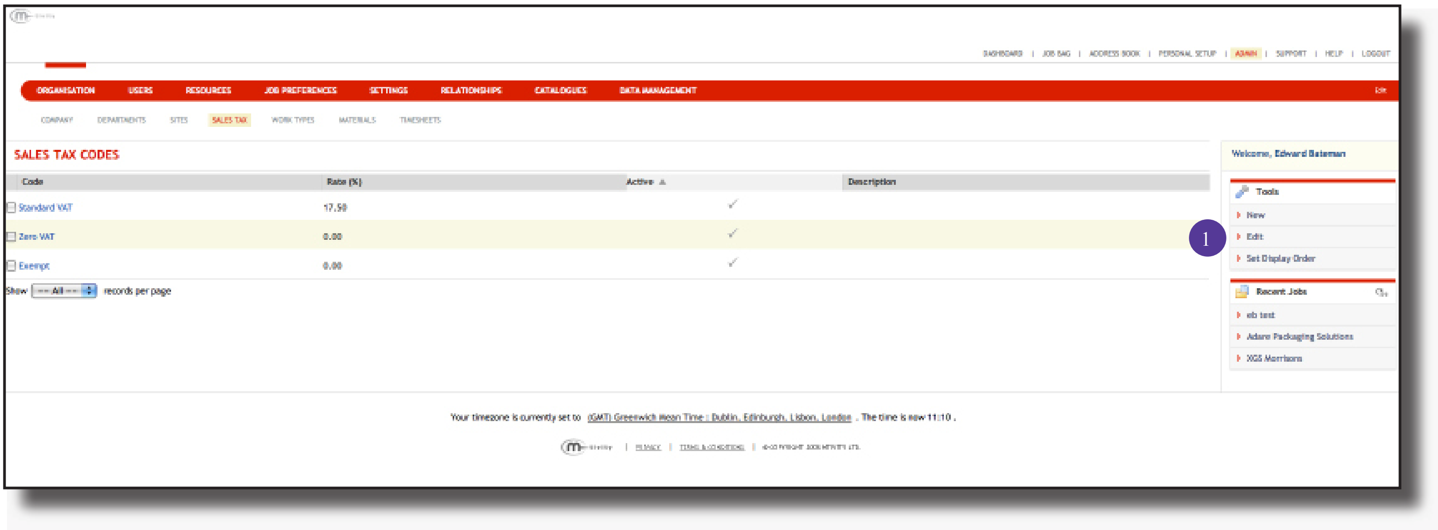
Enter in the details for the new Site. Enter in a Site Name,

2 Select the Site Administrator(s) by clicking on the Select Administrator(s) tool.

3 Enter in an Address for the Site.

4 Click Save to save the Site.

Admin: Organisation Sales Tax

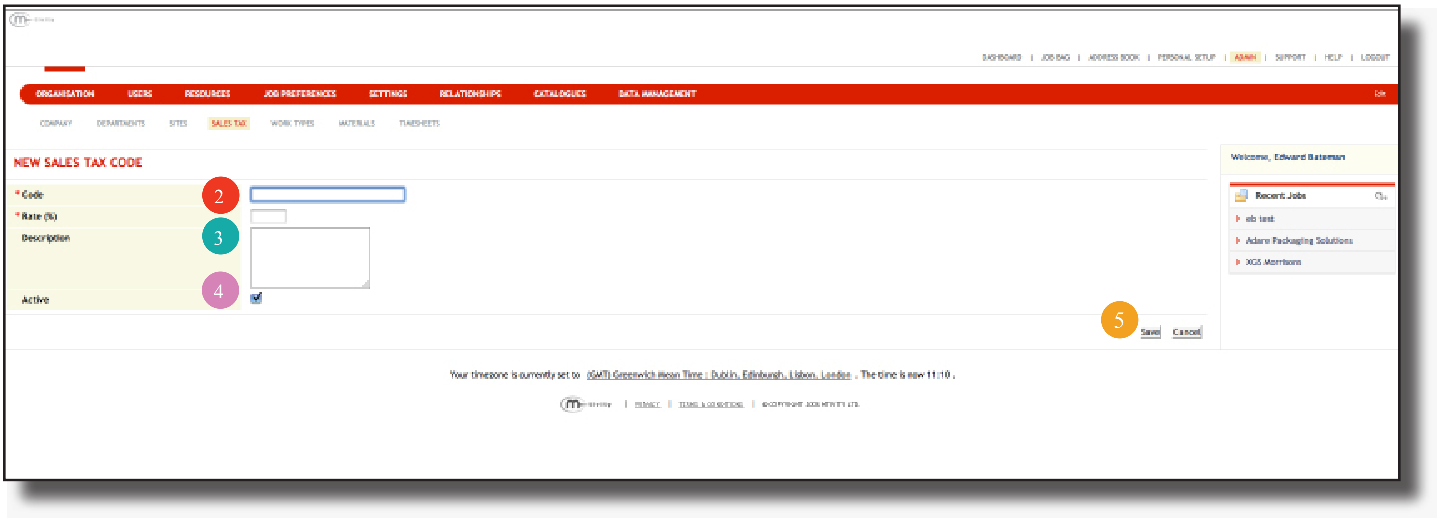


Admin > Organisations > Sales Tax

Displays system and custom created Sales Tax within the company

1 Click Tools > New to create a new Sales Tax.

New Sales Tax Code



1 Admin > Organisations > Sales Tax > Tools > New

Enter in the details for the new Sales Tax.

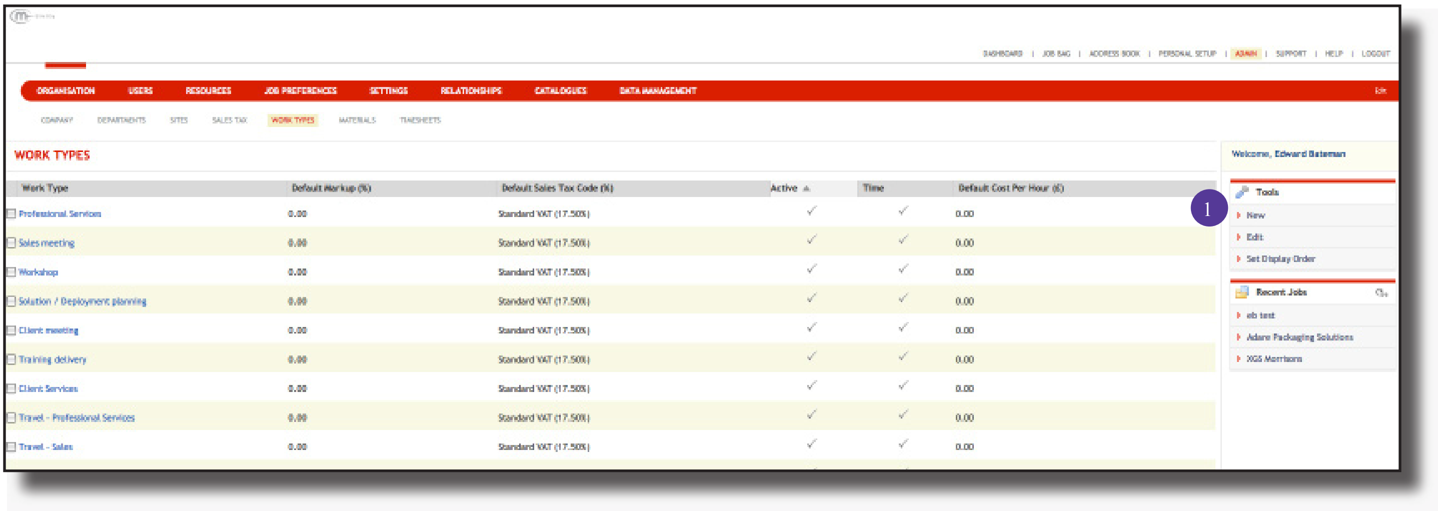
2 Enter in a Sales Tax Code,

3 Enter in the Sales Tax Rate (%).

4 Enter in a Description if needed, and check Active check box to make the Sales Tax active.

5 Click Save to save the Sales Tax.

Admin: Organisation Work Types



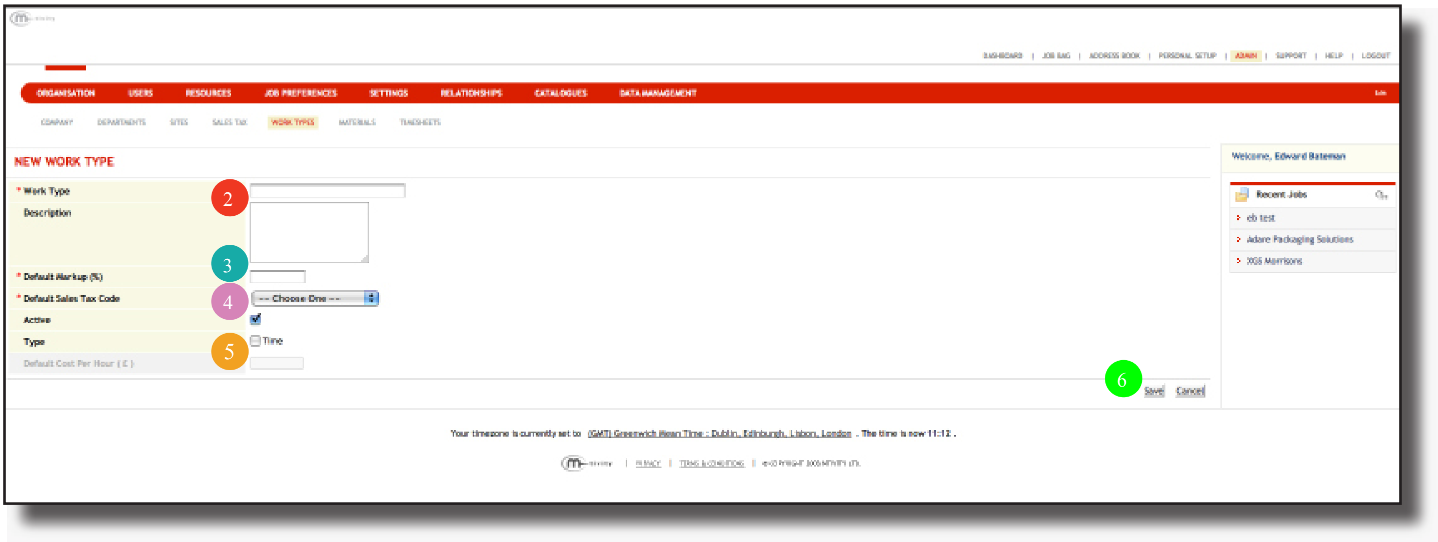
Admin > Organisations > Work Types

Displays all Work Types created within the company

1. Click Tools > New to create a new Work Type.

A description of the type of work required to complete an individual task within a workflow, and the resulting charge passed on to a client for completion of that task. Examples of Creative Work types may be Design, Copywriting, Proofing etc while examples of Print production work types may be Digital, Litho, Screen, Finishing etc

New Work Type

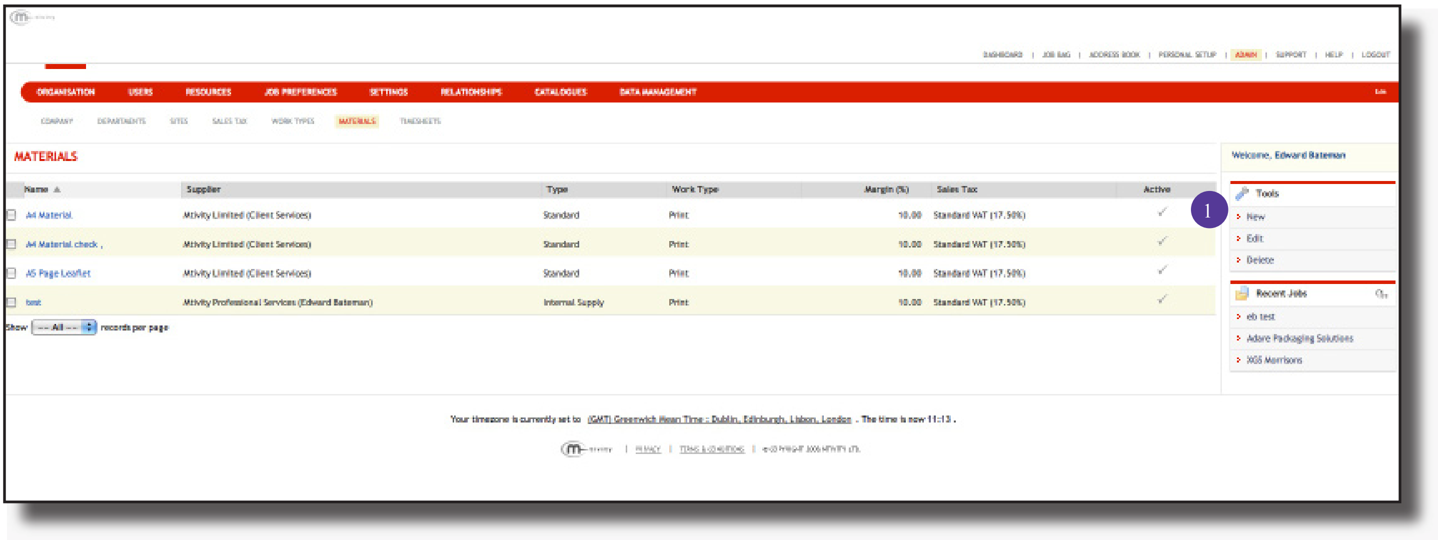


1. Admin > Organisations > Work Type > Tools > New

Enter in the details for the new Work Type.

2. Enter in Work Type (and Description if needed).
3. Enter the default Mark Up.
4. Select the appropriate Sales Tax.
5. You may specify a Time Work Type - check the check box - and enter default cost per hour.
6. Click Save to save the Work Type.

Admin: Organisation Materials



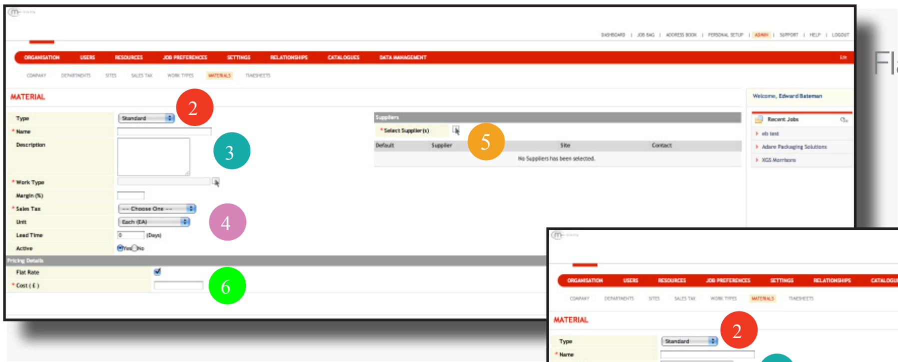
Admin > Organisations > Materials

Displays all Materials created within the company

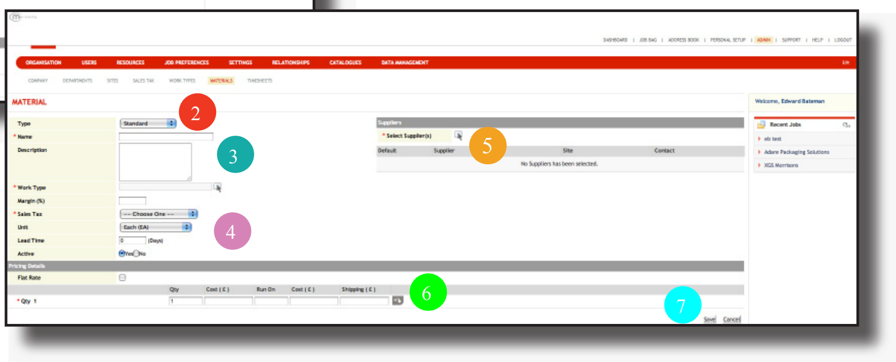
1 Click Tools > New to create a new Material.

Materials are associated to items and provide the standard price matrix for a specific type of marketing collateral e.g. A4 Brochure, when ordering a particular item. Each material is associated to a 'work type'.

New Material



Flat Rate Material



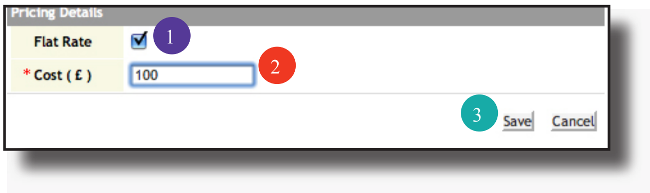
Quantity Based Material

1 Admin > Organisations > Materials > Tools > New

Enter in the details for the new Material.

2 Select Type: Standard, Internal Supply or From RFQ.
3 Enter Name (and Description if needed).
4 Select Work Type, enter Margin, select Sales Tax. Select Unit and enter Lead Time for print.
5 Click on the Supplier Select Tool to select the appropriate contact to supply the material.
6 Select the Pricing Details, Flat Rate or Quantity Based.
7 Click Save to save the Material.

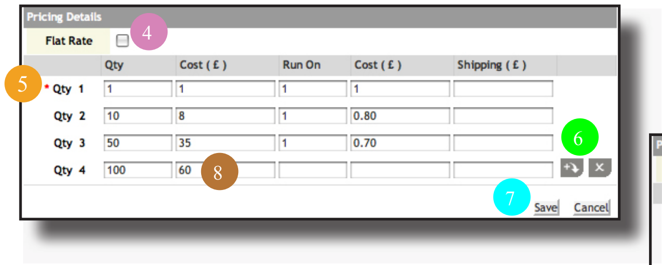
Admin: Organisation Materials Flat Rate

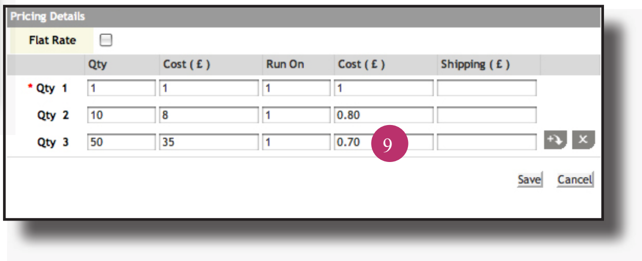


Admin > Organisations > Materials

1. Select Flat Rate check box.
2. Enter in the known cost for the material.
3. Click Save, the material will be saved with the flat rate.

Admin: Organisation Materials Quantity Based



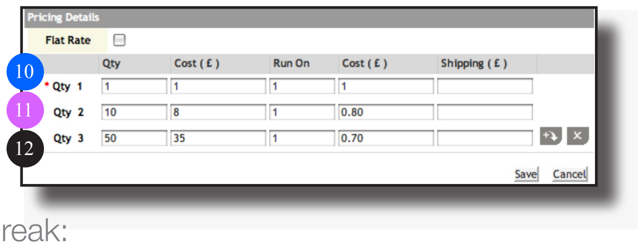


Admin > Organisations > Materials

4. Uncheck the Flat Rate check box to enter in a quantity based price.
5. Quantity line field become available.
6. You may enter as many Quantity lines as needed to create price breaks by clicking on the Add Quantity icon.
7. Once details of the Pricing Matrix are complete click Save to save the pricing matrix.

8. NOTE: to create a finite quantity that can be ordered, on the last quantity do not include any run on. This limits the final quantity to the last quantity in the pricing matrix.
9. NOTE: to create an unlimited quantity range that can be ordered, on the last quantity include a run on with an associated cost for each additional quantity ordered. This allows the end user to order any quantity desired.

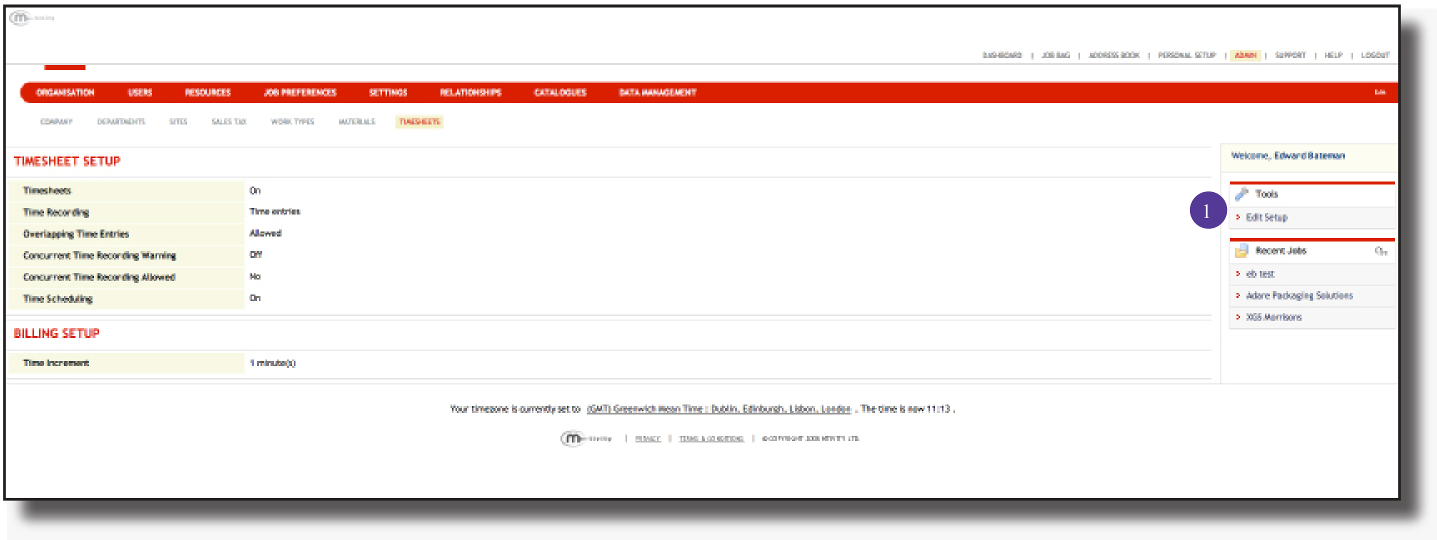
Price Break Example



Explanation of a price break:

10. QTY 1: Minimum Quantity is 1, with a cost of £1, a run on of 1 with a cost of £1
Price Break 1 happens when Qty ordered is 10. The price break is 20%.
11. QTY 2: Quantity 10 the cost is £10 – 20% = £8. Run on of 1 with a cost of £1 – 20% = 80p.
Price Break 2 happens when Qty ordered is 50. The price break is 30%.
12. QTY 3: Quantity 50 the cost is £50 – 30% = £35. Run on 1 with a cost of £1 – 30% = 0.70p.

Admin: Organisation Timesheets



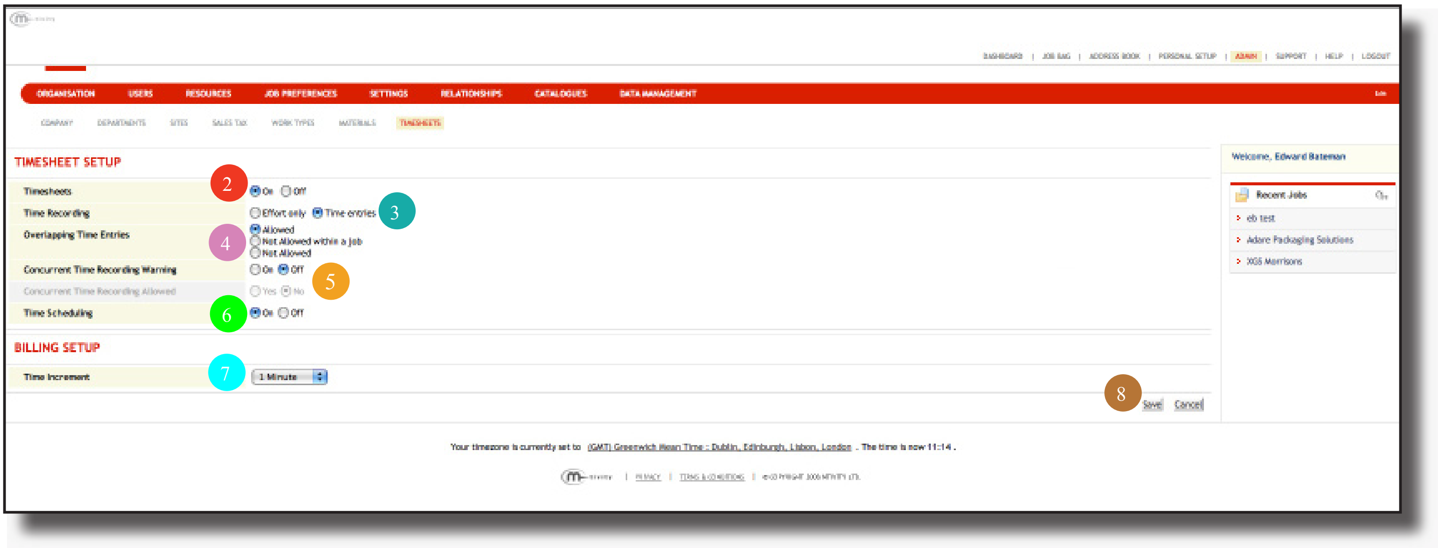
Admin > Organisations > Timesheets

Edit Timesheet setup for the company

1 Click Tools > Edit Setup

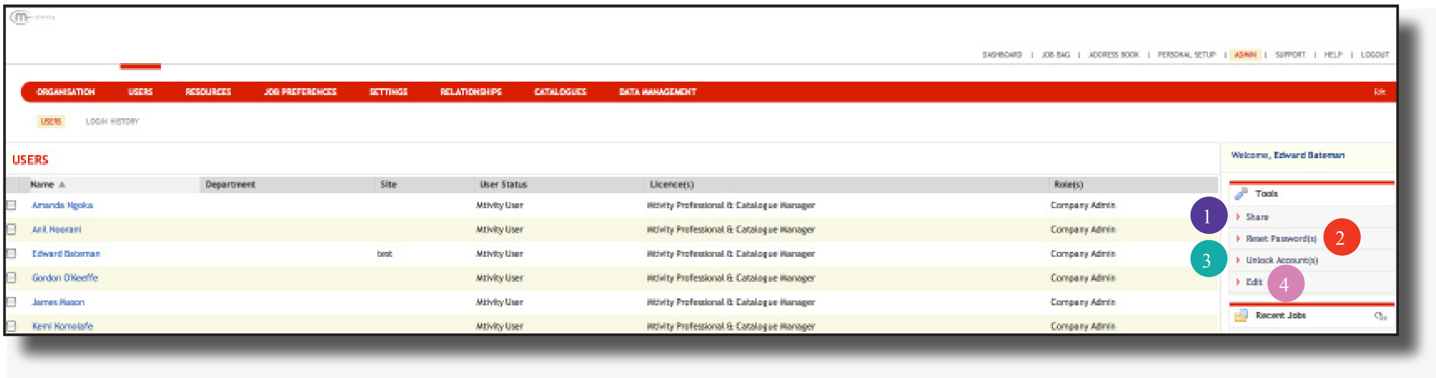
Timehseets allows a user to record time against a particular task within a workflow. This allows tracking of the users cost versus the charge to client for completion of the task. Timesheets may be automated using a stopwatch function.

Edit Timesheet Setup



1 Admin > Organisations > Timesheets > Tools > Edit Setup.
2 Select if Timesheets are On or Off for the company.
3 Select Time Recording as Effort Only or Time Entries.
4 Select Overlapping Time Entries settings. To record time on two task at the same time.
5 Select Concurrent Time Recording Warning and if Allowed.
6 Select if Time Scheduling is turned On or Off.
7 Billing Setup - specify Time Increments.
8 Click Save to save settings.

Admin: Users



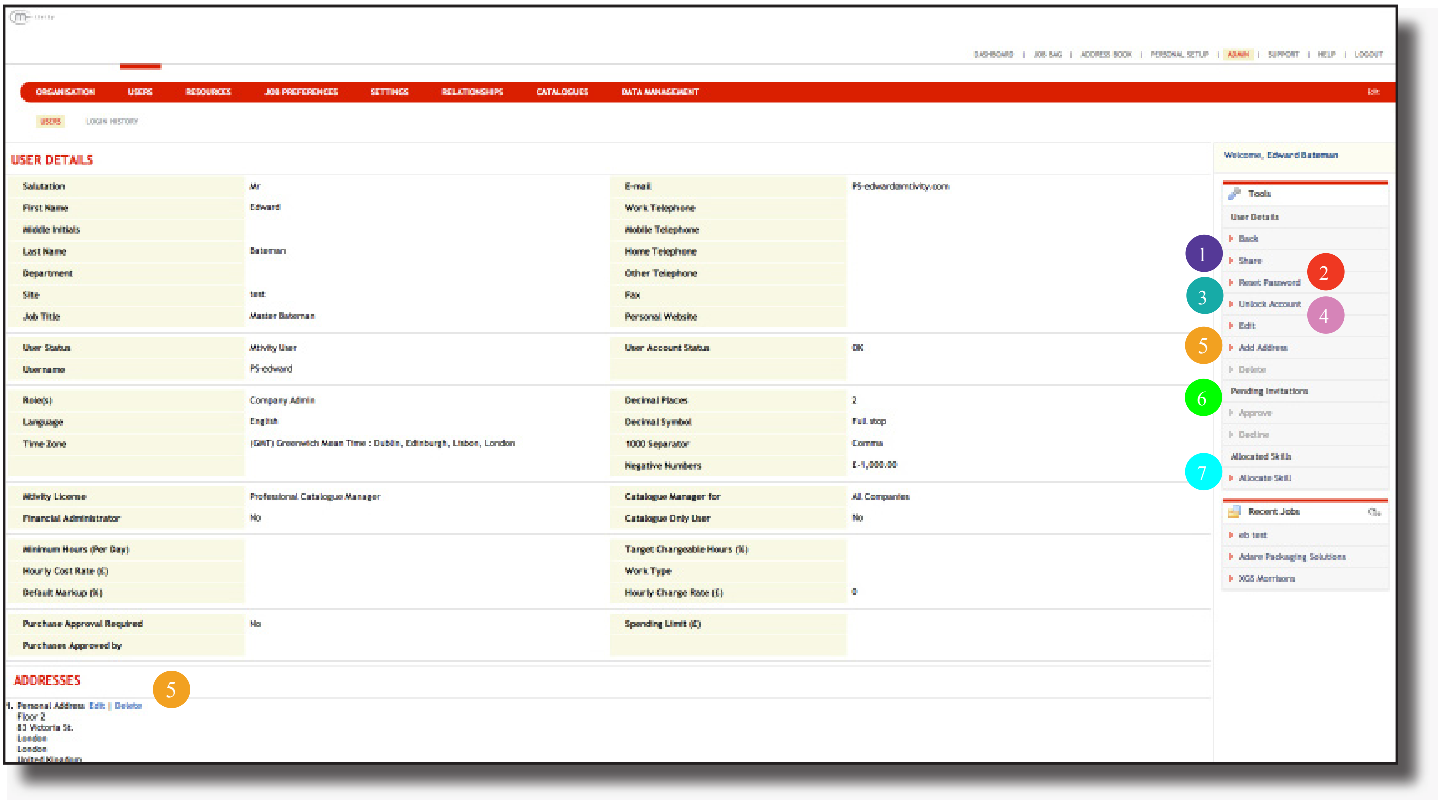
Admin > Users: Displays a list of all signed up and pending users to Mtivity.

Using the Tools menu you are able to:

1. Share users - this shares users with other accounts you have a relationship with.
2. Reset Password - for individual or multiple users by checking the users check box(es)
3. Unlock Account - for individual or multiple users by checking the users check box(es)
4. Edit - edit users details by checking the users check box

Click on a user name link to view User details, and edit from details view.

Edit User

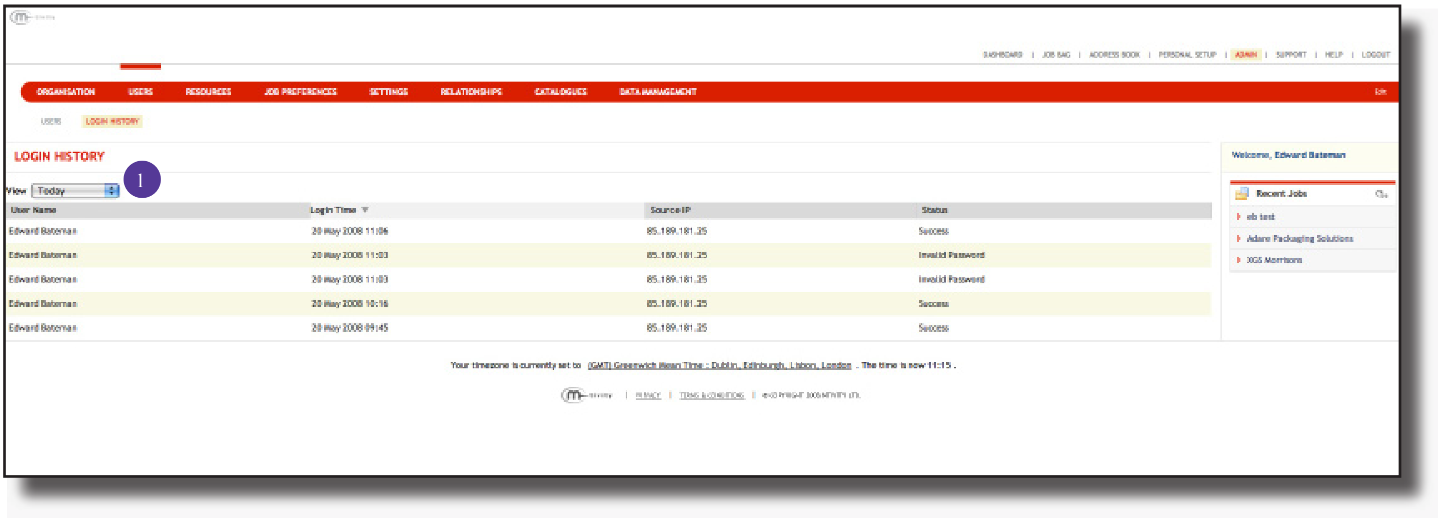


Admin > Users > Click on a Username link to view User Details page.

Using the Tools menu you are able to:

1. Share user - with other accounts you have a relationship with.
2. Reset Password - for this user - this will send a password reset email to the user.
3. Unlock Account - for this user.
4. Edit - edit personal details, Username, Role, Licence, Chargeable Hours and Purchase Approval.
5. Add Address - enter a new Address for the user.
6. Pending Invitations - if the user requires admin approval you may Approve or Reject the invitation.
7. Allocate Skills - to the users from the pre-defined Skills (created in Resources > Skills)

Admin: Users Login History

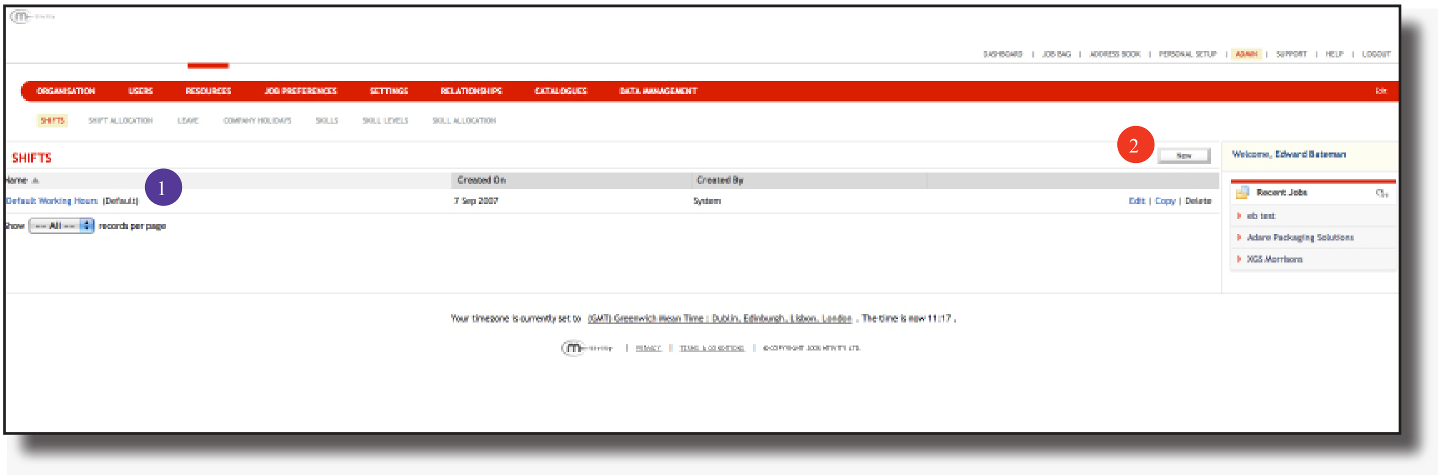


Admin > Users > Login History

Here all login history for users of the Account are recorded. This includes login time, the IP address that the users logged in from and the status of the login.

You can filter the view by clicking on the View Filter 1 drop down.

Admin: Resources Shifts



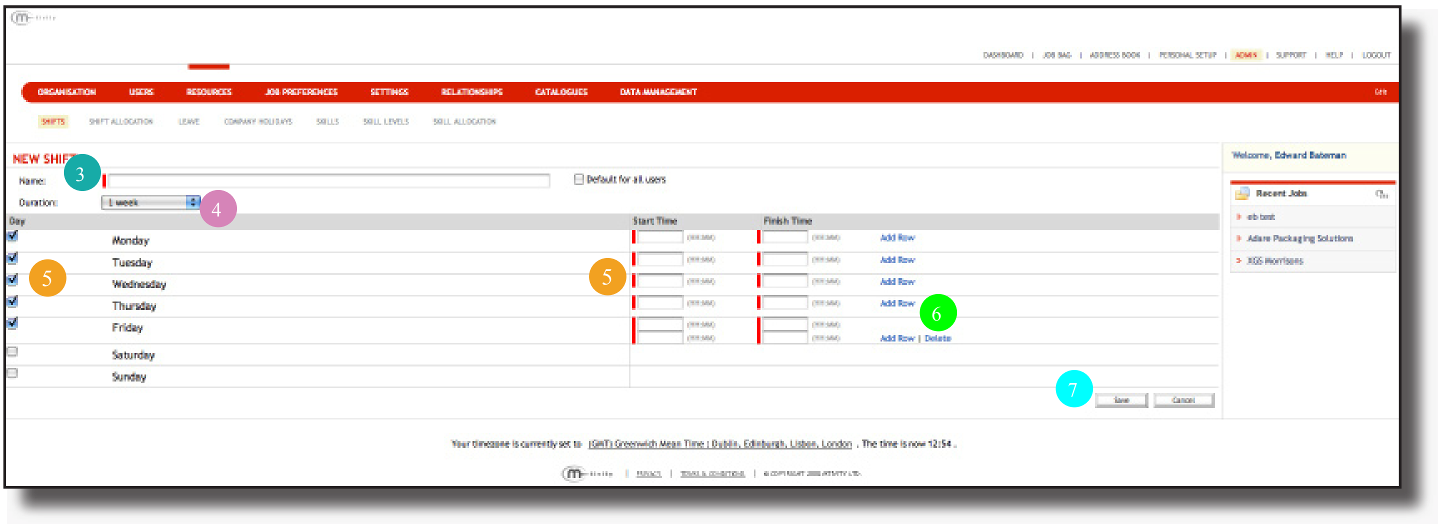
Admin > Resources > Shifts

Displays all Shifts created for the Company.

1. Default Working hours is a Mtivity system created shift and it will be applied to all users unless otherwise specified.
2. Click the New Button to create a new Shift.

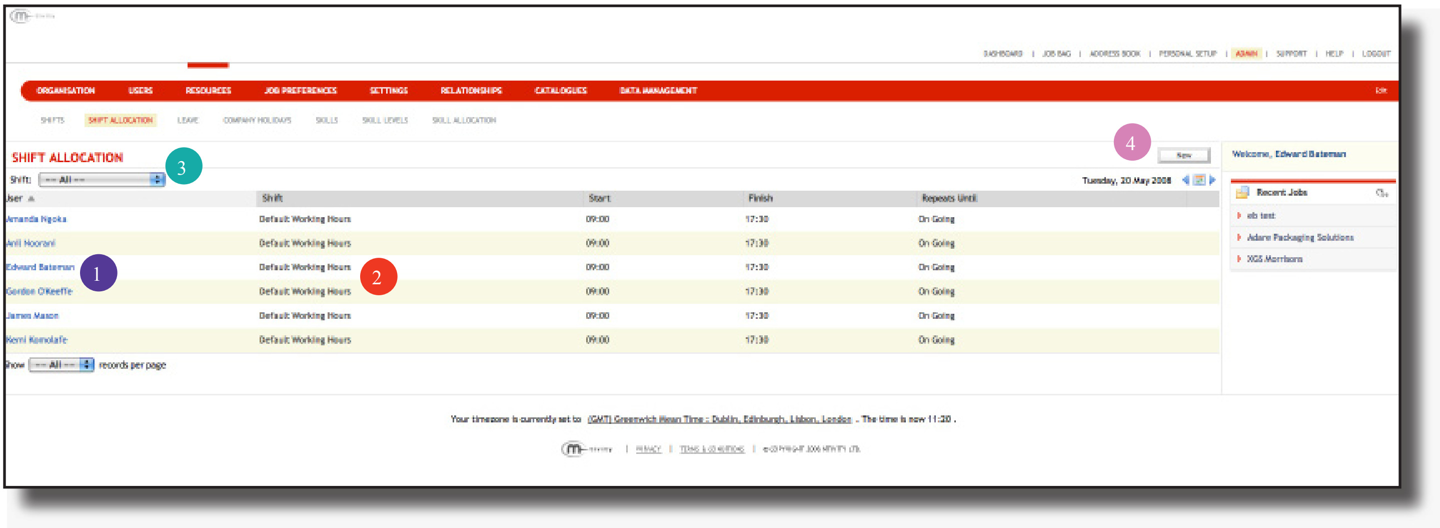
Mtivity's Shift management tools allow definition of standard working hours for one or more shift patterns within a business. Users may be allocated to a shift which in turn affects their availability for tasks within a workflow. This shift allocation also determines utilisation parameters for a company's users.

New Shift



2. Admin > Resources > Shifts > New (button)
3. Enter name for the shift and select if it should be default for all users or not.
4. Select Shift Duration.
5. Select the Days for the shift and time slots.
6. You may create a spilt shift by clicking on the Add Row link.
7. Click Save to save the Shift.

Admin: Resources Shift Allocation

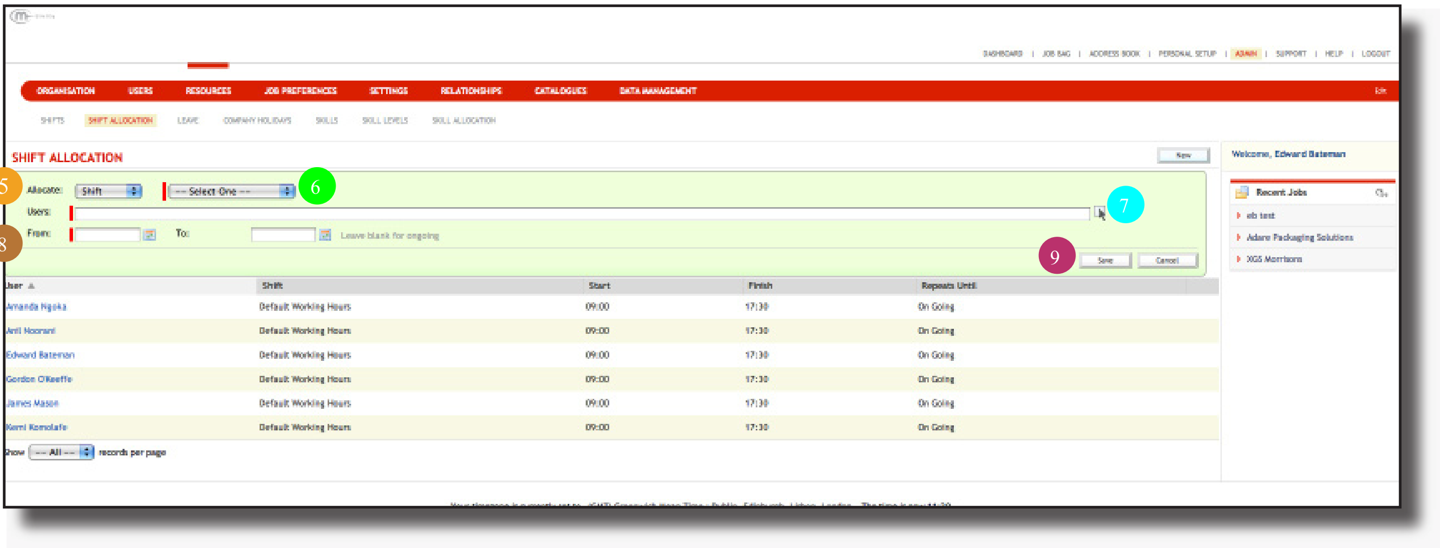


Admin > Resources > Shift Allocation

Displays all Mtivity users for the company and what shift is allocated to them

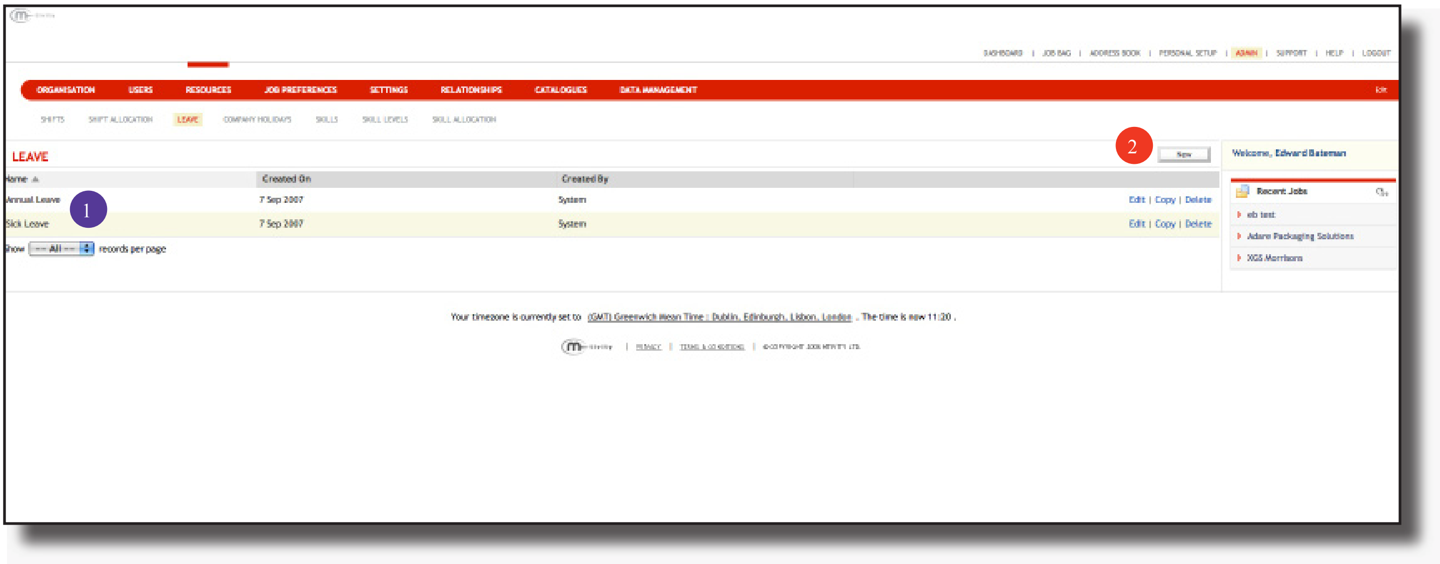
1. List of all Mtivity Users.
2. List of what shift is allocated to the user.
3. You can filter the User list by what shift is allocated to them using the drop down.
4. Click the New Button to allocate users to a different shift or to a Leave type.

New Shift Allocation



4. Admin > Resources > Shift Allocation > New (button)
5. Allocate Shift or Leave from the drop down.
6. Select the Shift or Leave type (created previously).
7. Select the User(s) that this shift/leave type will apply to.
8. Specify the date range (leave the To date field blank for ongoing).
9. Click Save to save the Shift Allocation.

Admin: Resources Leave

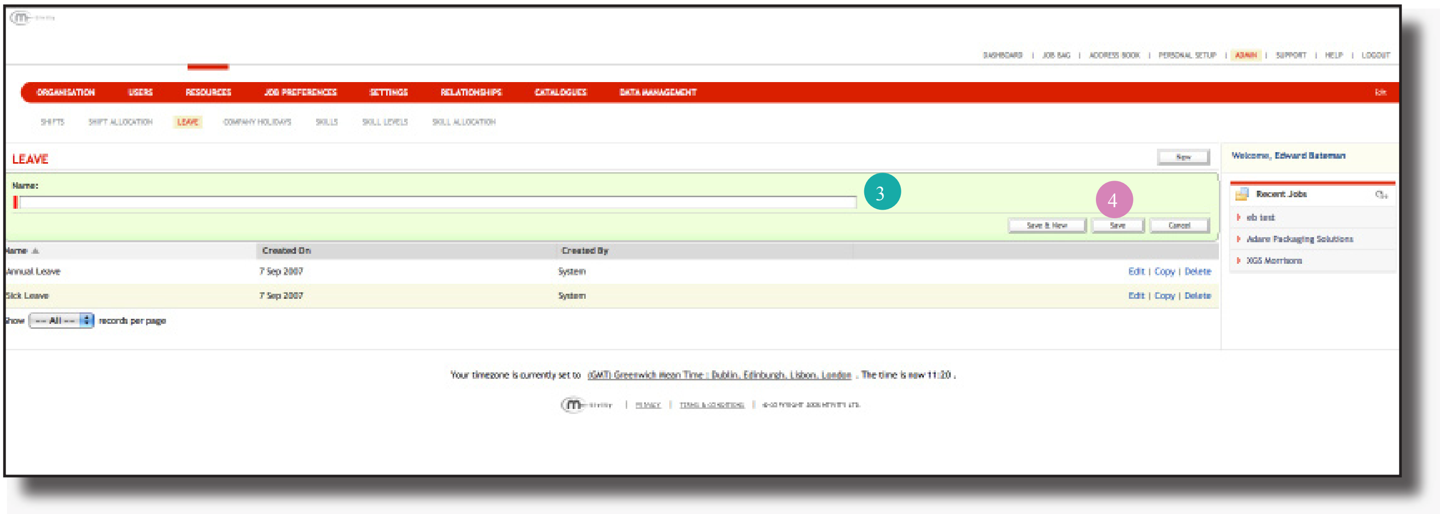


Admin > Resources > Leave

Displays all Leave Types created for the Company. Annual and Sick leave are system created.

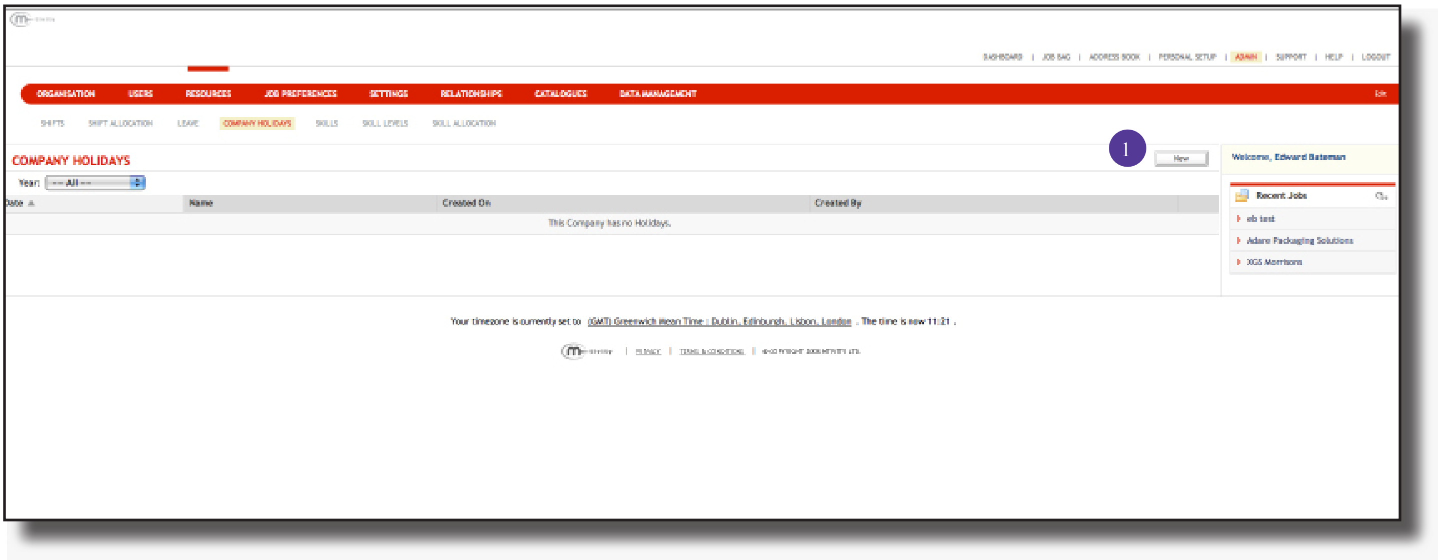
1 Annula and Sick Leave are Mtivity system created leave types.
2 Click the New Button to create a new Leave Type.

New Leave Type



2 Admin > Resources > Leave > New (button)
3 Enter name for the Leave type.
4 Click Save to save the Shift.

Admin: Resources Company Holidays

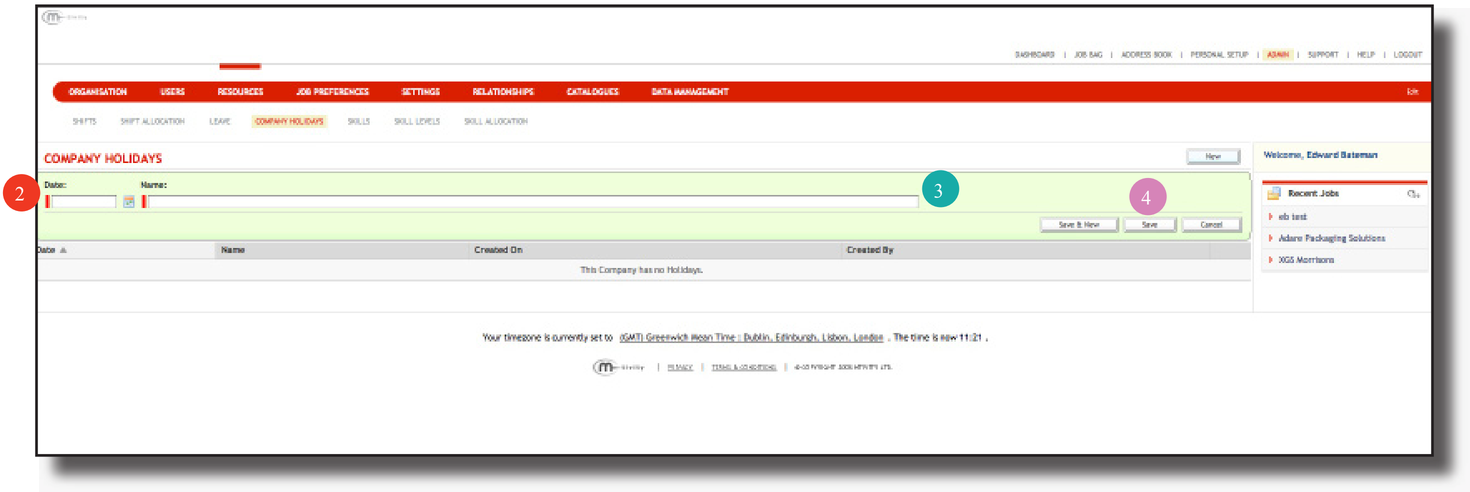


Admin > Resources > Company Holidays

Displays all defined Company Holidays for the Company.

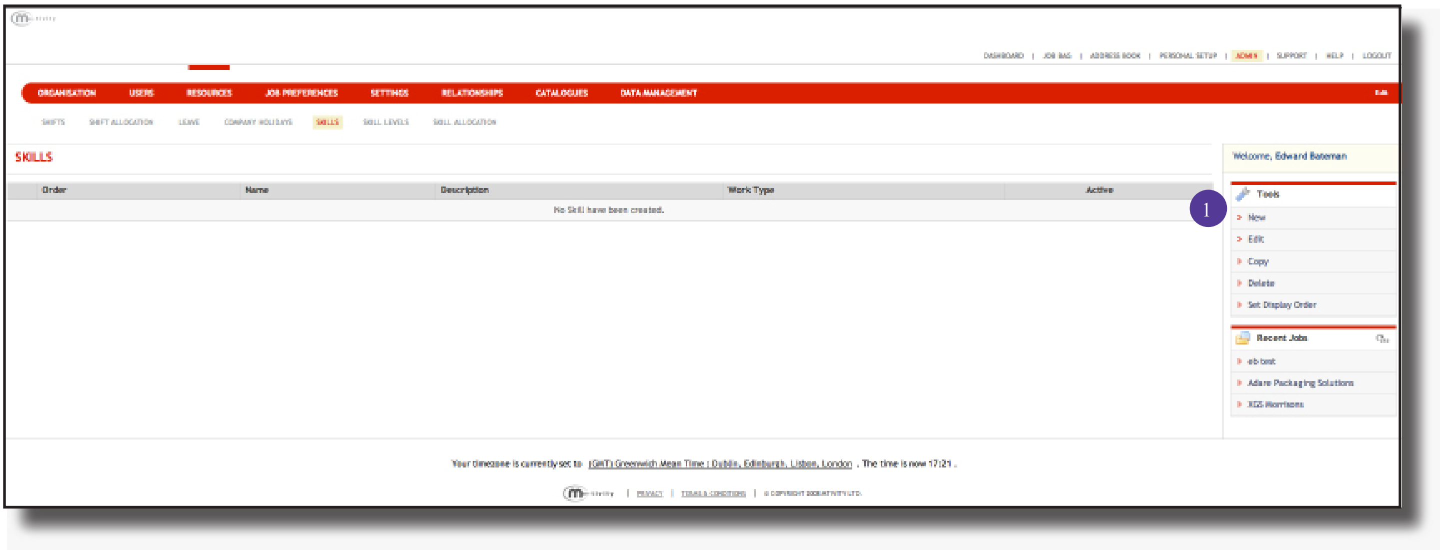
1 Click the New Button to create a new Company Holiday.

New Company Holiday



1 Admin > Resources > Company Holidays > New (button)
2 Enter Date for the Company Holiday.
3 Enter the Name for the Company Holiday.
4 Click Save to save the Company Holiday.

Admin: Resources Skills



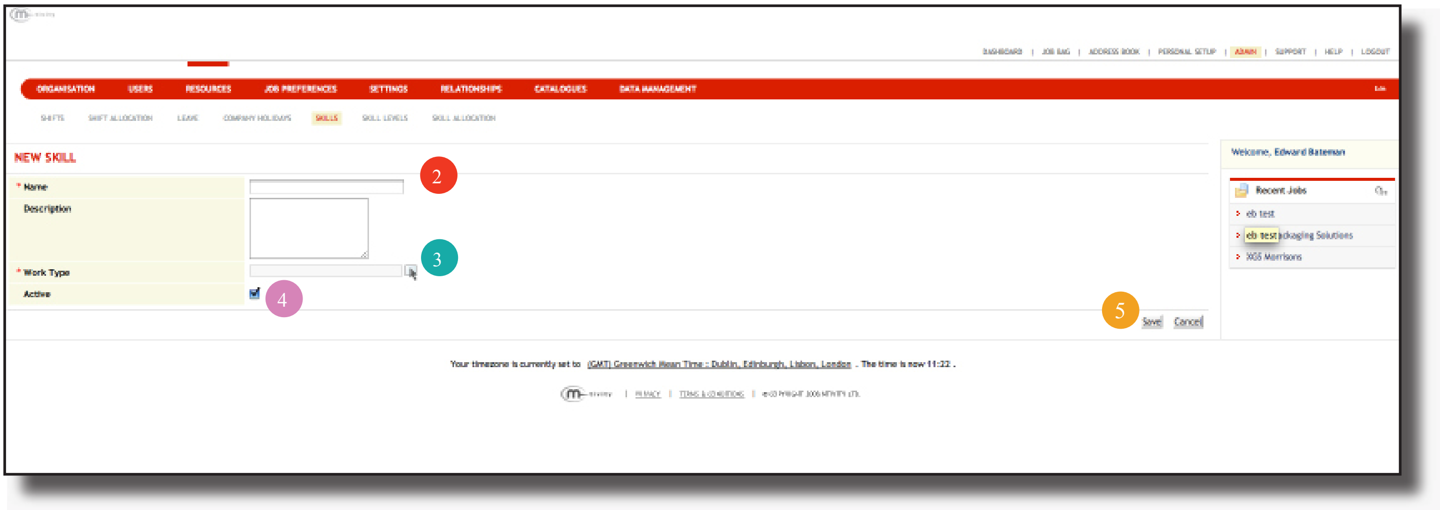
Admin > Resources > Skills

Displays all defined Skills for the Company.

1 Click Tools > New to create a new Skill.

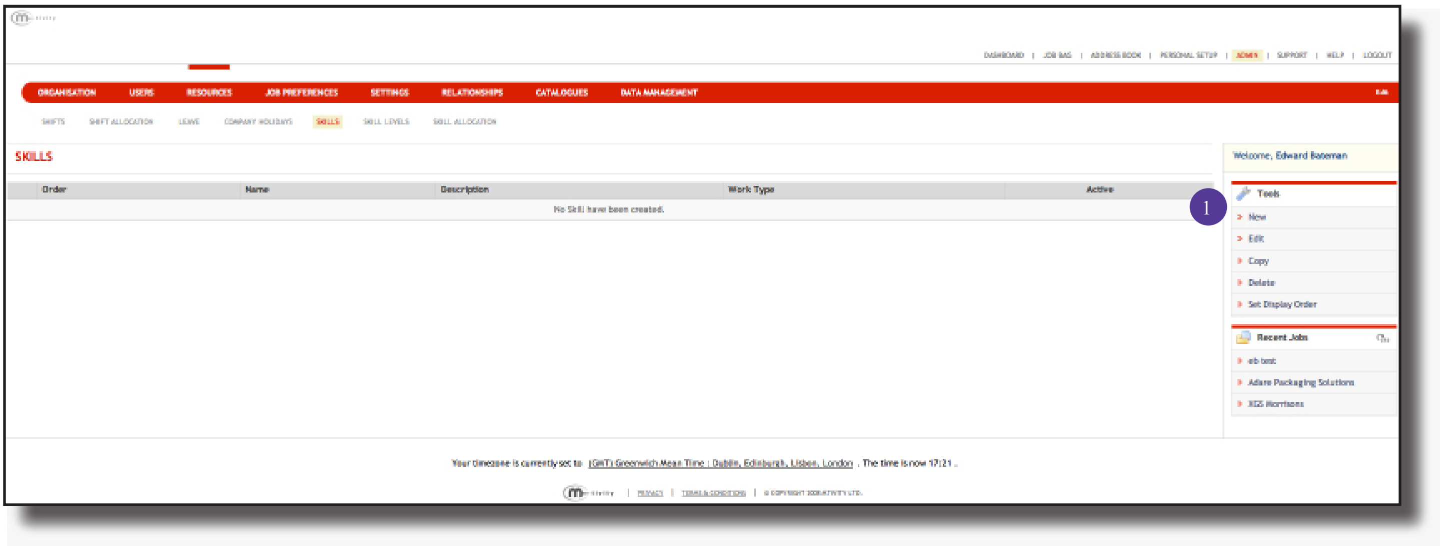
Skills can be created and assigned to users with an appropriate skill level. This is useful for scheduling time for users when using the Scheduling Option.

New Skill



1 Admin > Resources > Skills > Tools > New
2 Enter Name for the new Skill (and description if needed).
3 Select the Work Type for the Skill.
4 Check the check box to Activate the skill, or uncheck to deactivate it.
5 Click Save to Save the new Skill.

Admin: Resources Skill Levels



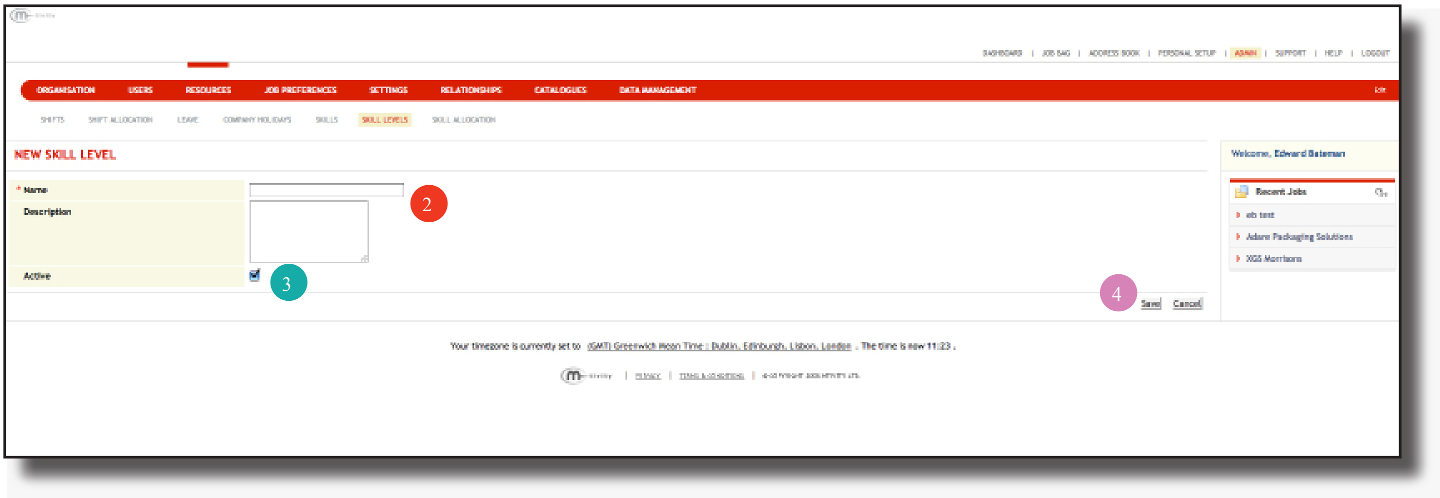
Admin > Resources > Skill Levels

Displays all defined Skill Levels for the Company.

1 Click Tools > New to create a new Skill Level.

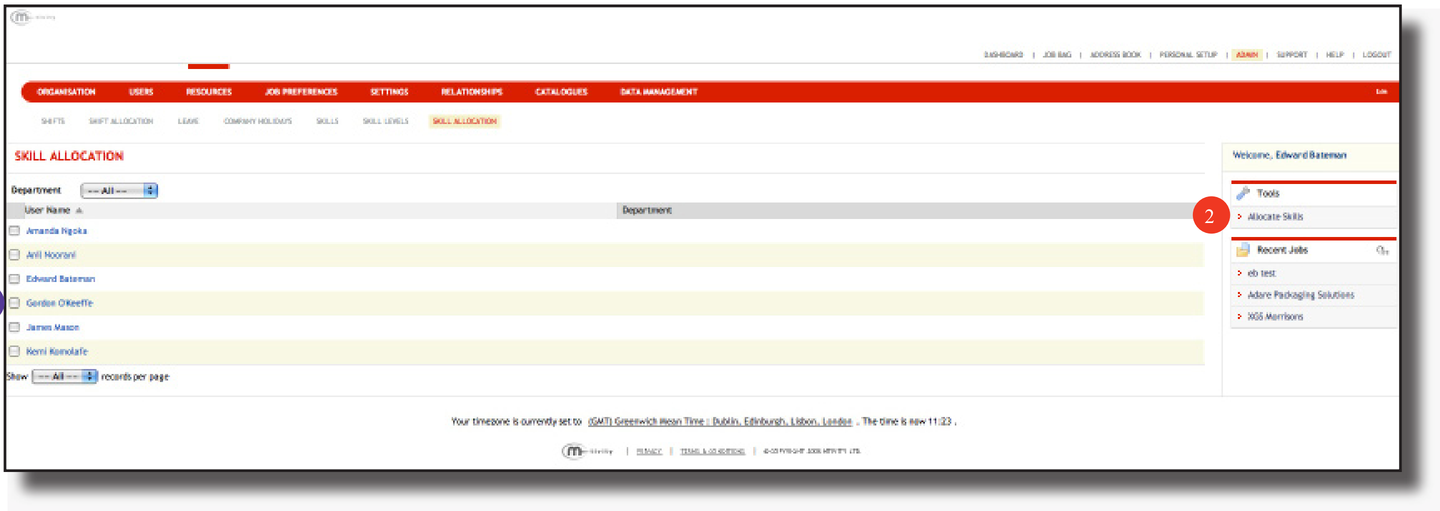
Skill Levels can be assigned to users with the appropriate skill. This is useful for scheduling time for users when using the Scheduling Option and determining what level of proficiency they have with a certain skill.

New Skill Level



1 Admin > Resources > Skill Level > Tools > New
2 Enter Name for the new Skill Level (and description if needed).
3 Check the check box to Activate the skill level, or uncheck to deactivate it.
4 Click Save to Save the new Skill Level.

Admin: Resources Skill Allocation

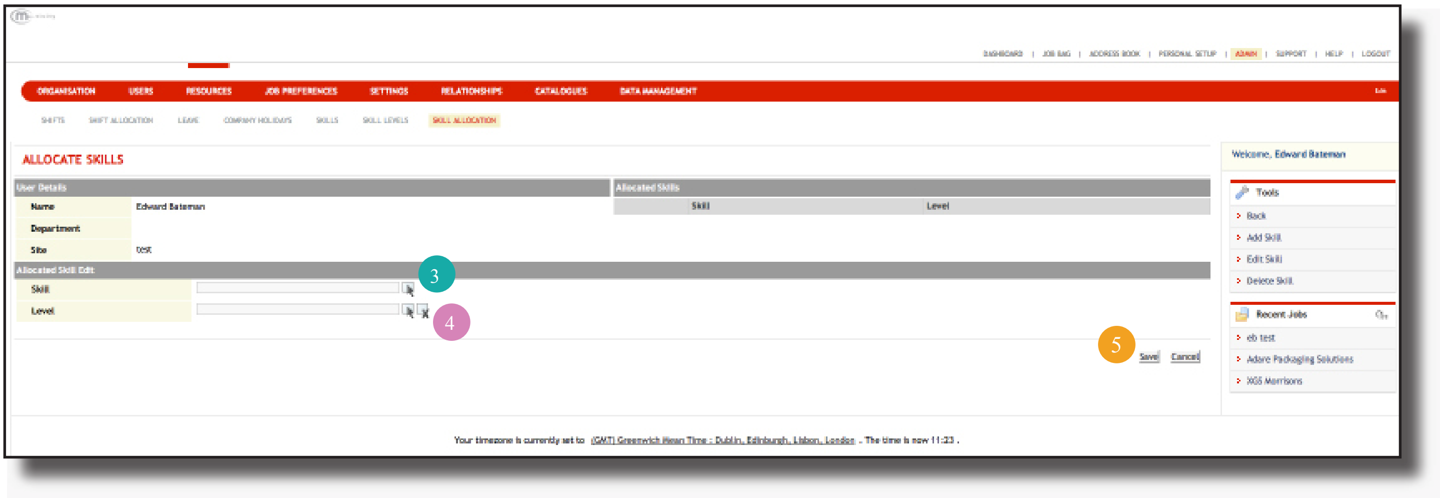


Admin > Resources > Skill Allocation

Displays all users in the company who you can allocate a pre defined skill to.

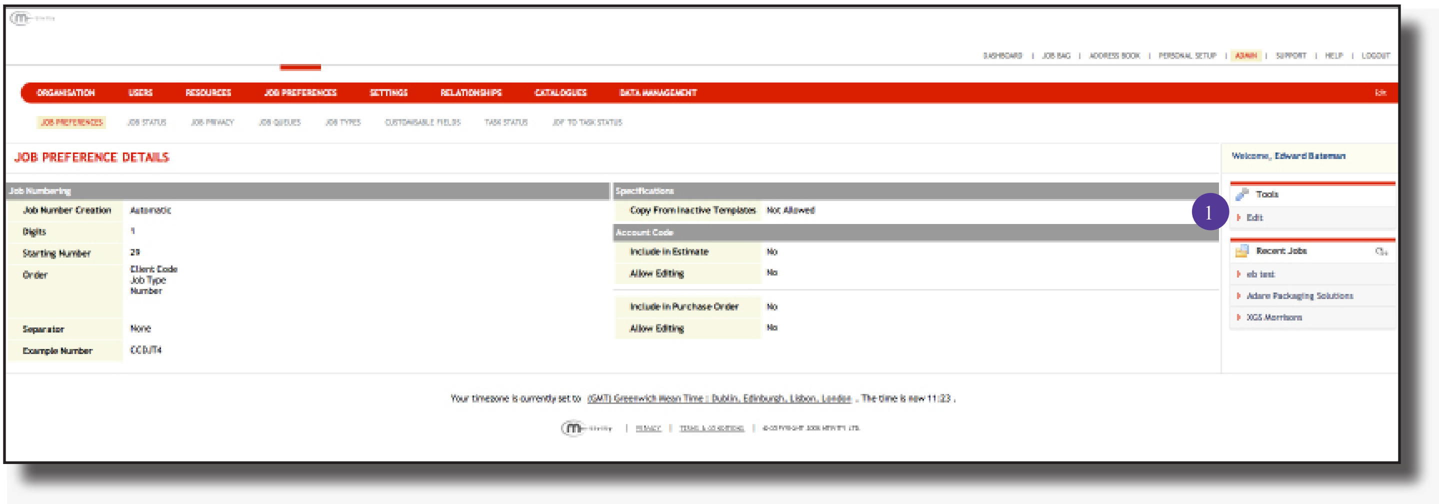
1. Click on a User(s) check box to select them.
2. Click Tools > Allocate Skills to select the skill to allocate.

Allocate Skill (and Skill Level)



2. Admin > Resources > Skill Allocation > Tools > Allocate Skills.
3. Select the Skill for the selected user.
4. Select the appropriate Skill Level for the selected user.
5. Click Save to Save the Skill and Skill Level to the user profile.

Admin: Job Preferences

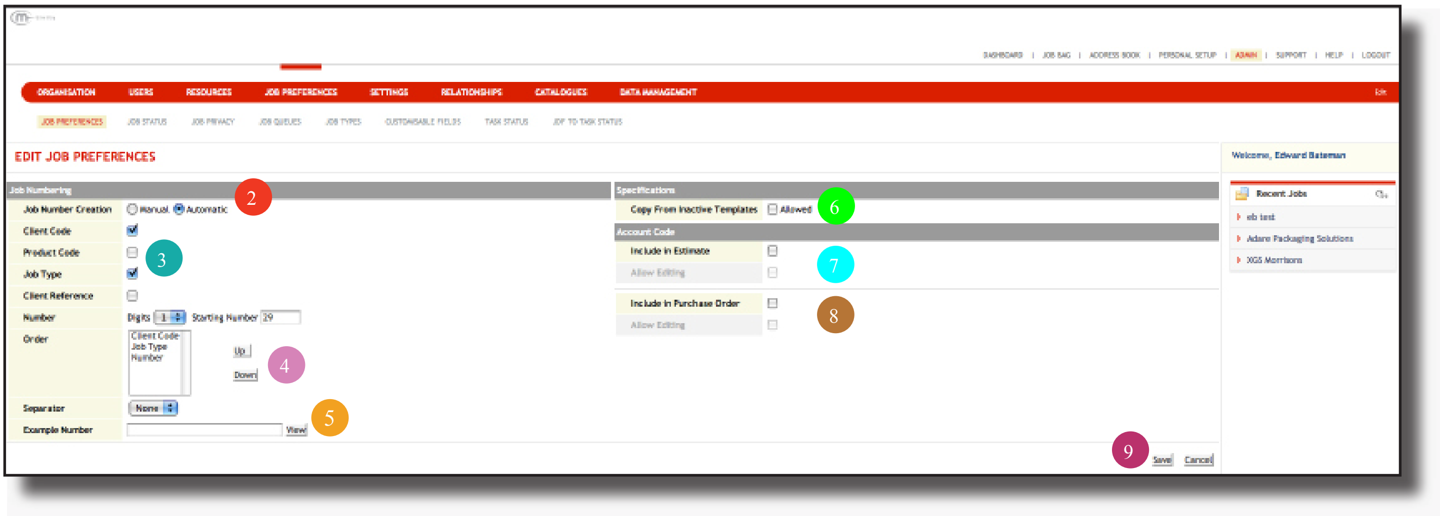


Admin > Job Preferences > Job Preferences

Displays Job Preferences for the Admin User, including Job Numbering, if it is possible to copy inactive Specification Templates, and whether to display the Account Code in Estimates and/or Purchase Order and if the account code is editable.

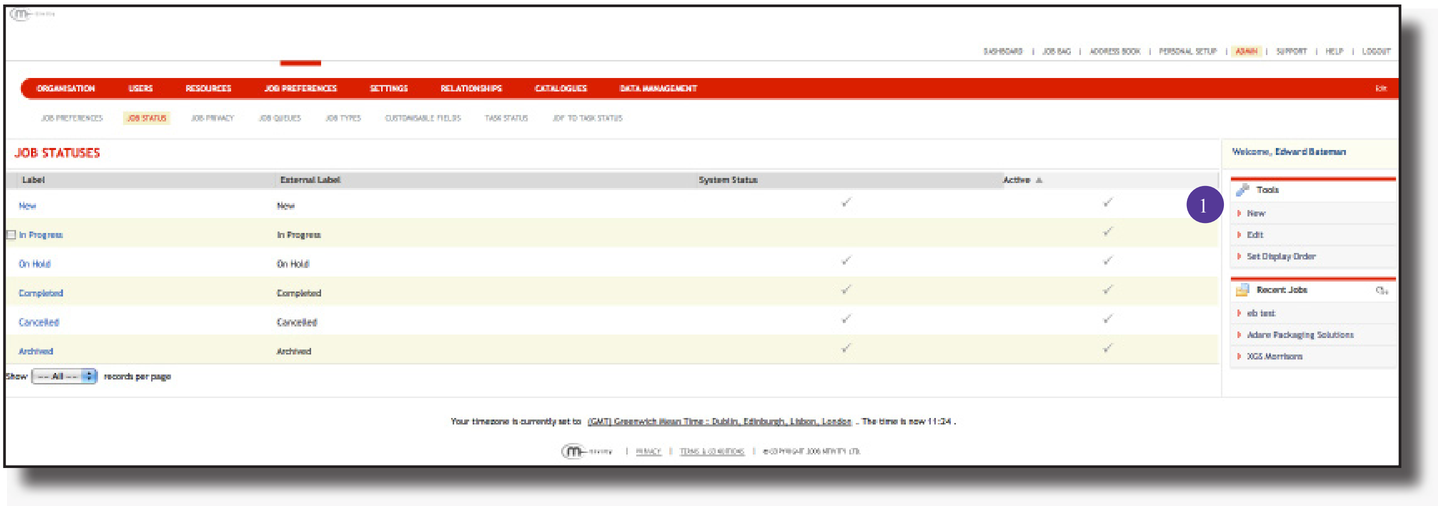
1 Click Tools > Edit - to edit the Job Preferences.

Edit Job Preferences



1 Admin > Job Preferences > Tools > Edit.
2 Select if Job Numbering will be Manual or Automatic.
3 If Automatic - select what fields should be displayed in the Job Number.
4 Select starting number, set display order and select separator if needed.
5 Click View Button to see an example of what the Job Number will look like.
6 Allow Old Spec Templates to be copied or not.
7 Select to Include Account Code in Estimate and to make it editable or not.
8 Select to Include Account Code in Purchase Order and to make it editable or not.
9 Click Save to save Job Preferences.

Admin: Job Preferences Job Status



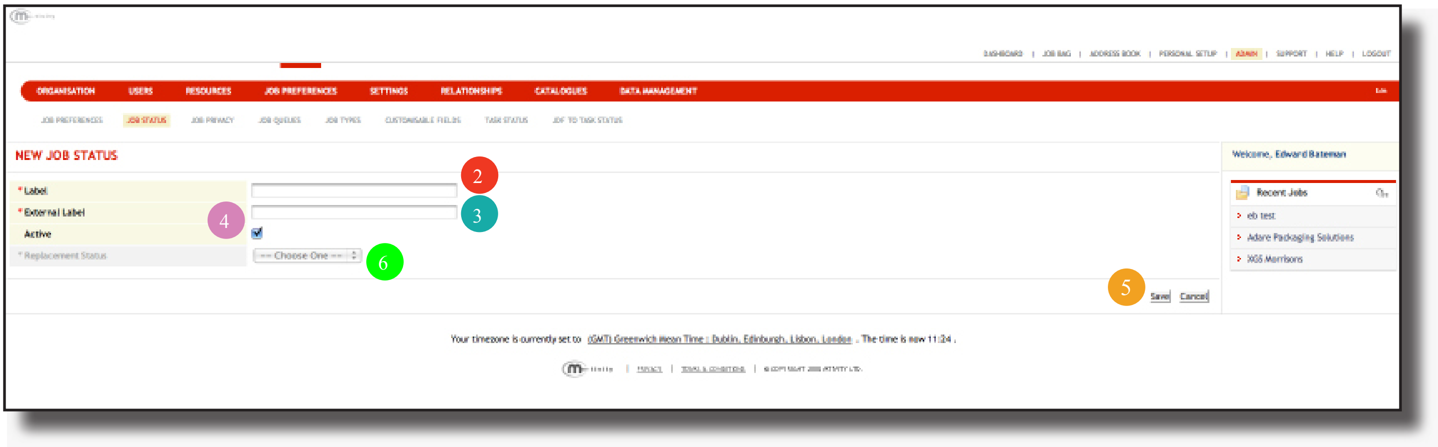
Admin > Job Preferences > Job Status

Displays a list of all system and personally defined Job Statuses for the company.

1 Click Tools > New to create a new Job Status.

Job Status allows monitoring of the key milestones in a Job, assigning a status level to them which can be updated both manually and automatically based on certain stages of a workflow. This status allows real-time tracking of Work in Progress while also allowing visibility of the progression of a Job to the Client.

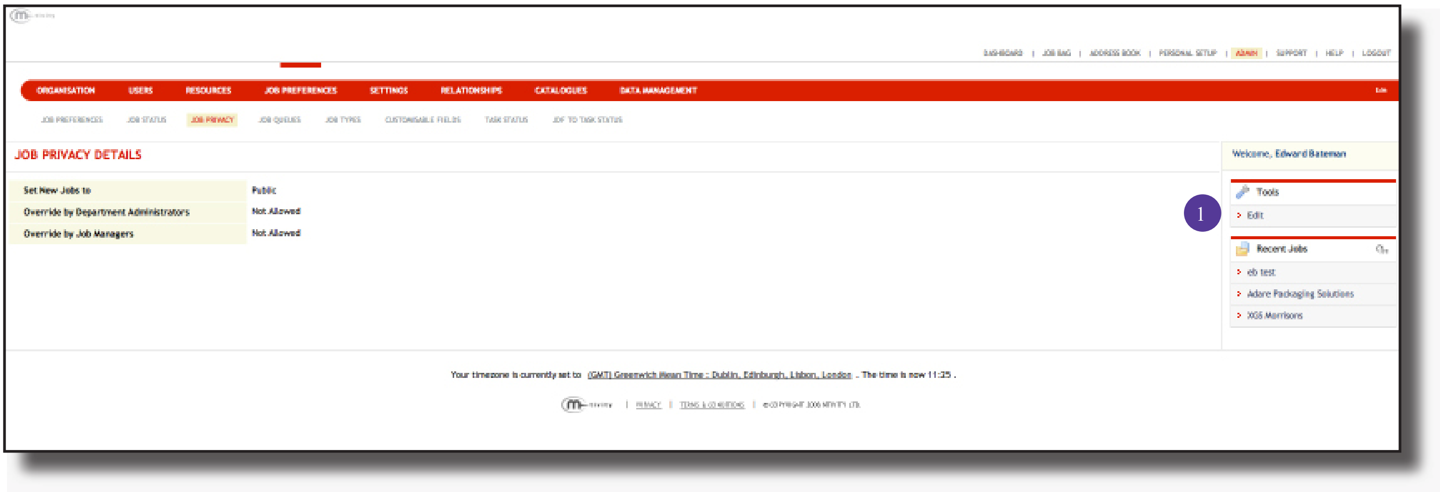
New Job Status



1 Admin > Job Preferences > Job Status > Tools > New.
2 Enter in Label for the Job Status.
3 Enter External Label for the Job Status (what will be displayed on the job).
4 Select if the Job Status is Active or not.
5 Click Save to save the new Job Status.

6 NOTE: Replacement Status - this option is available if you change an existing job status that is currently in use. When you edit this status you will have the option to replace it with a different pre-created status.

Admin: Job Preferences Job Privacy

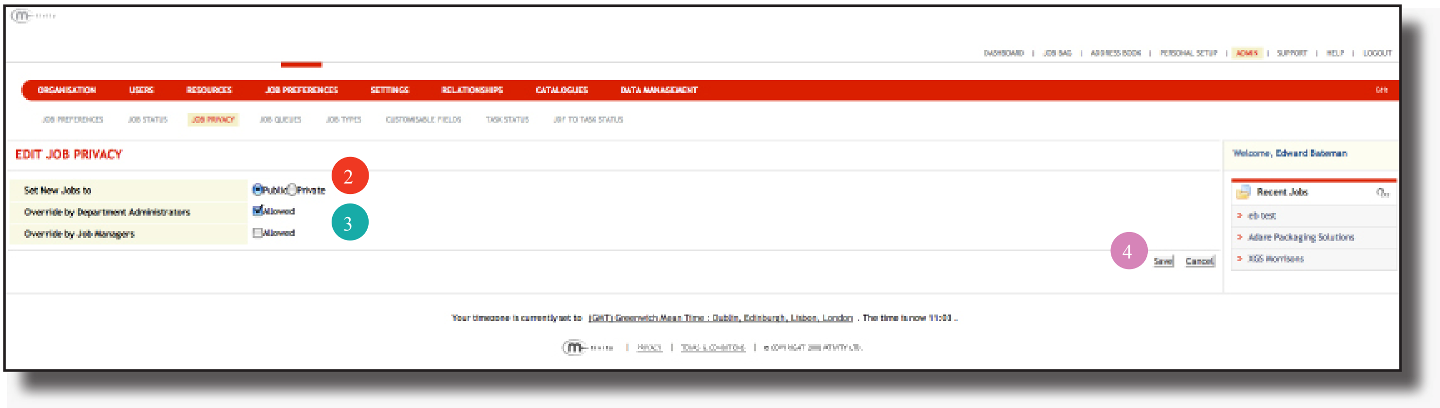


Admin > Job Preferences > Job Privacy

Displays the Privacy Settings for new jobs, and if these settings can be overwritten by Department Admins or Job Managers. If these settings are allowed, Department Admins and/or Job Managers will be able to manually change the Job Privacy settings on jobs that they manage.

1. Click Tools > Edit to change the Job Privacy settings.

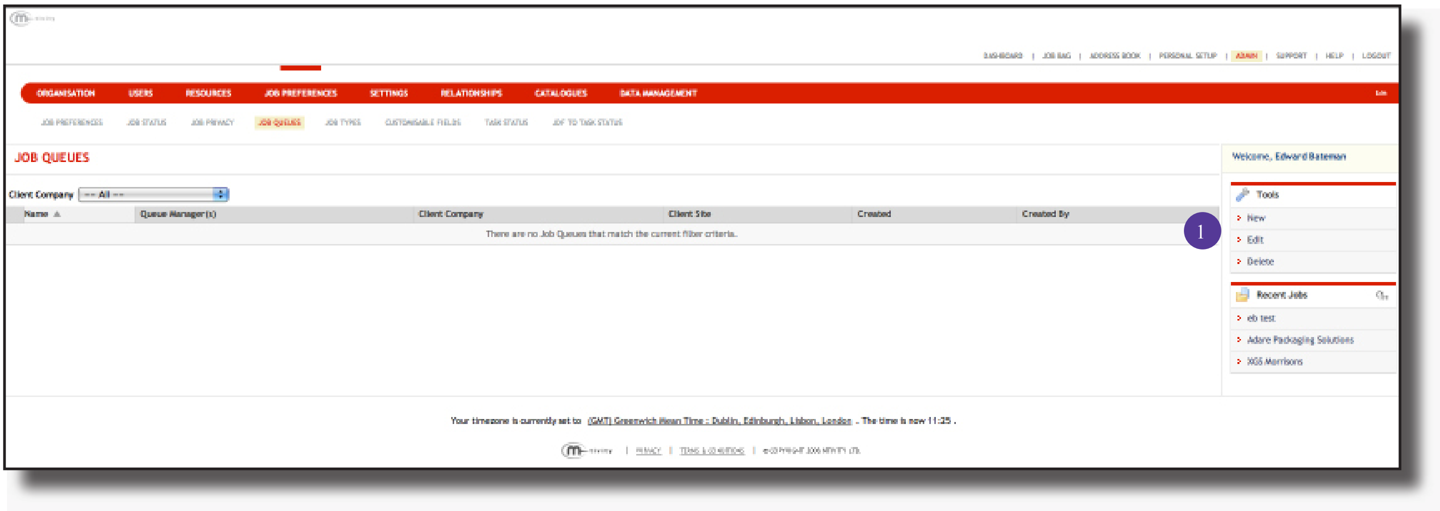
Edit Job Privacy



1. Admin > Job Preferences > Job Privacy > Tools > Edit.
2. Select if new Jobs will be set to Public or Private.
3. Select if Job Privacy settings can be overridden by Department Admins and/or Job Managers.
4. Click Save to save the Job Privacy settings.

NOTE: If jobs are set to Public, any company colleague can view the job. If Jobs are set to Private, only Job Managers, Job Team members and Company Admin can view the Job.

Admin: Job Preferences Job Queues

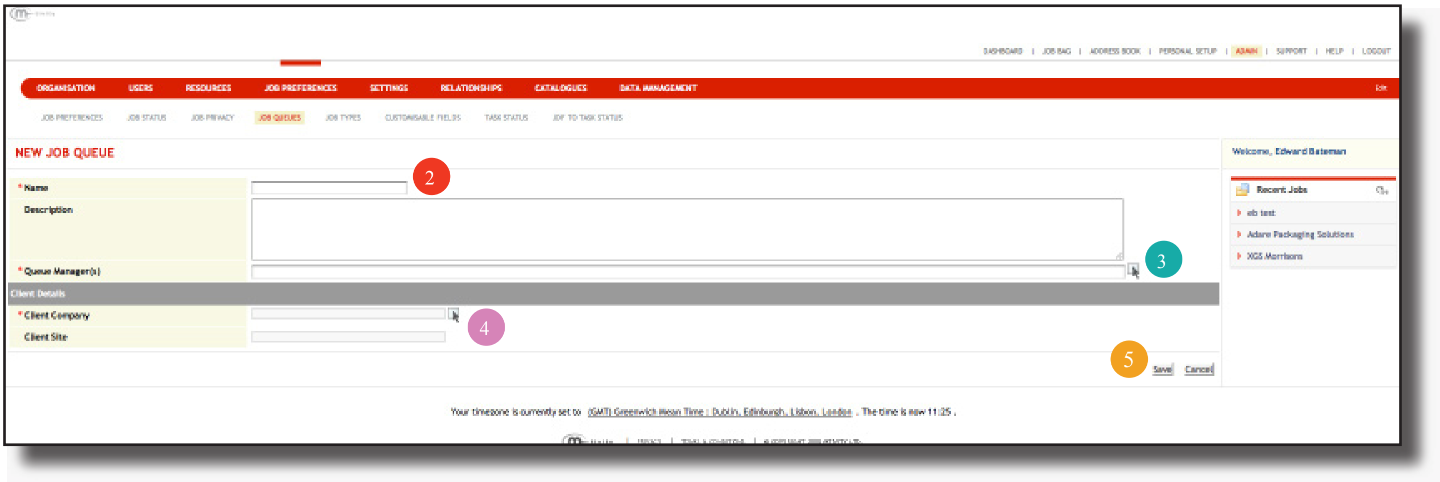


Admin > Job Preferences > Job Queues

Displays all Job Queues set up for the Company. A Job Queue is set up for a Client Company. When a Client creates a job they may assign the Job Manager to a Company and select from the Job Queues that has been created for the client account. This notifies the Job Queue Managers who can select who will be the Job Manager and have responsibility for the Job.

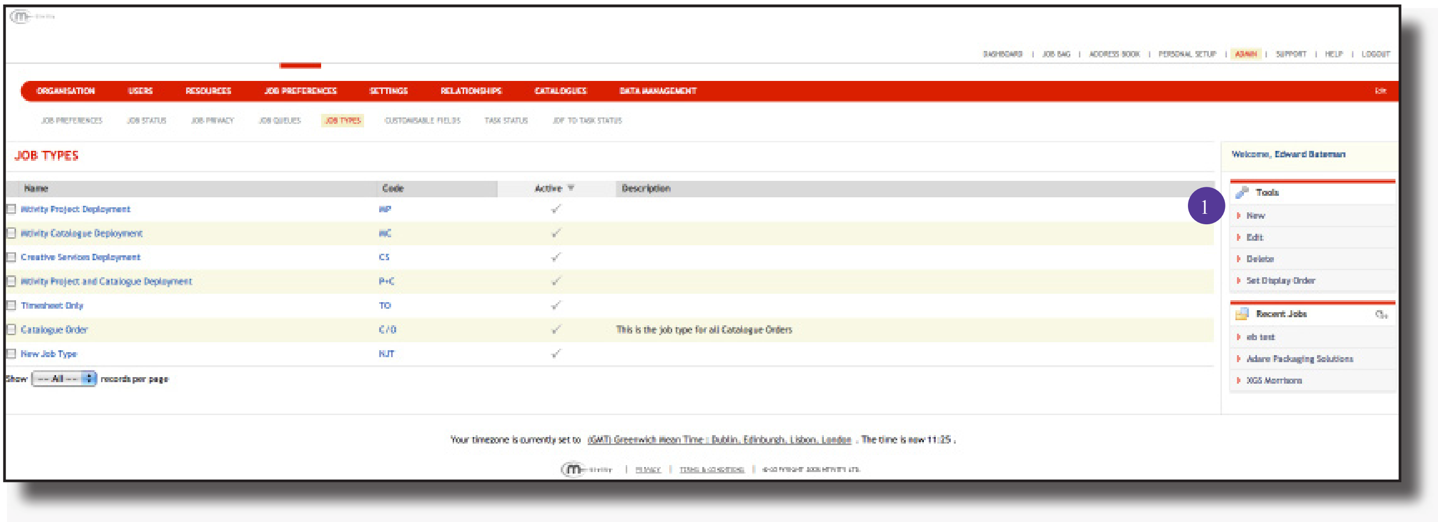
1. Click Tools > New to create a new Job Queue

New Job Queue



1. Admin > Job Preferences > Job Queue > Tools > New.
2. Enter the Queue name (and description if needed).
3. Select the Queue Managers by clicking on the Queue Manager(s) select tool.
4. Select the Client Company account that applies to this queue.
5. Click Save to save the Job Queue.

Admin: Job Preferences Job Types

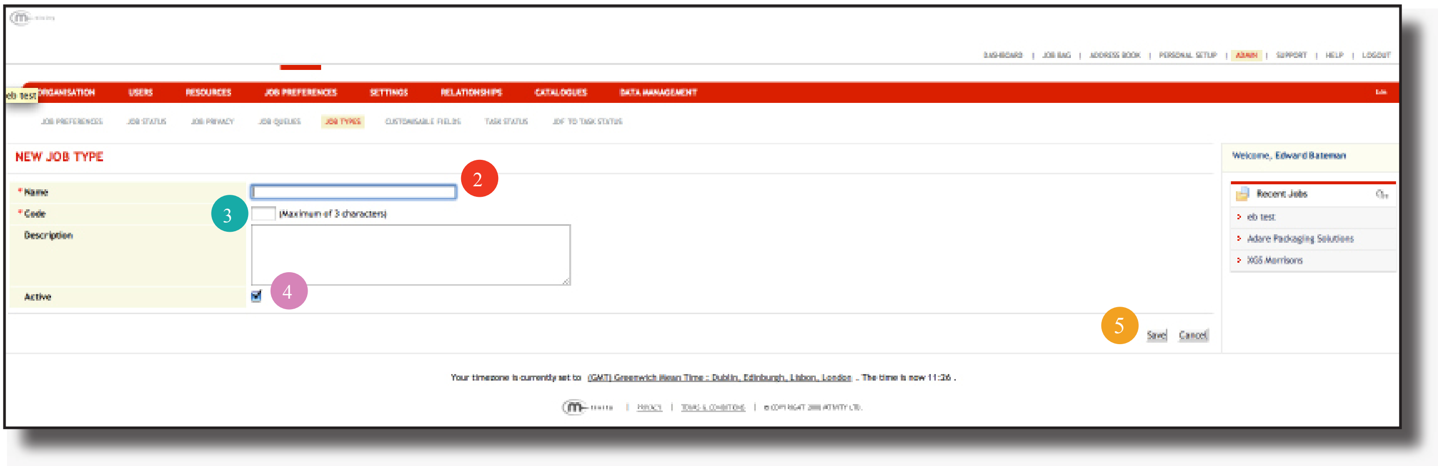


Admin > Job Preferences > Job Types

Displays all Job Types created for the Company. Job Types are used to define the purpose of the job. You can create any number of job types to represent the type of jobs that you carry out such as Print, Design, Copy writing etc.

1. Click Tools > New to create a new Job Type.

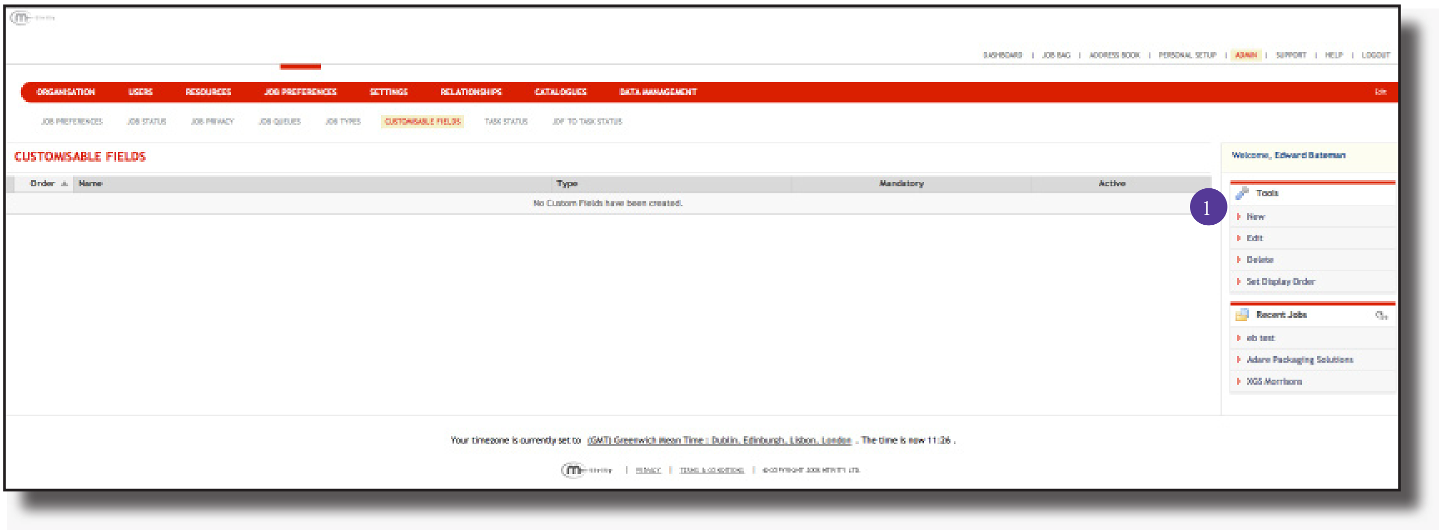
New Job Type



1. Admin > Job Preferences > Job Type > Tools > New.
2. Enter the Job Type name.
3. Enter the Job Type code (and description if needed).
4. Select to make the Job Type active or not.
5. Click Save to save the Job Type.

NOTE: the new Job Type will appear in the Job Type drop down when a new job is created.

Admin: Job Preferences Customisable Fields

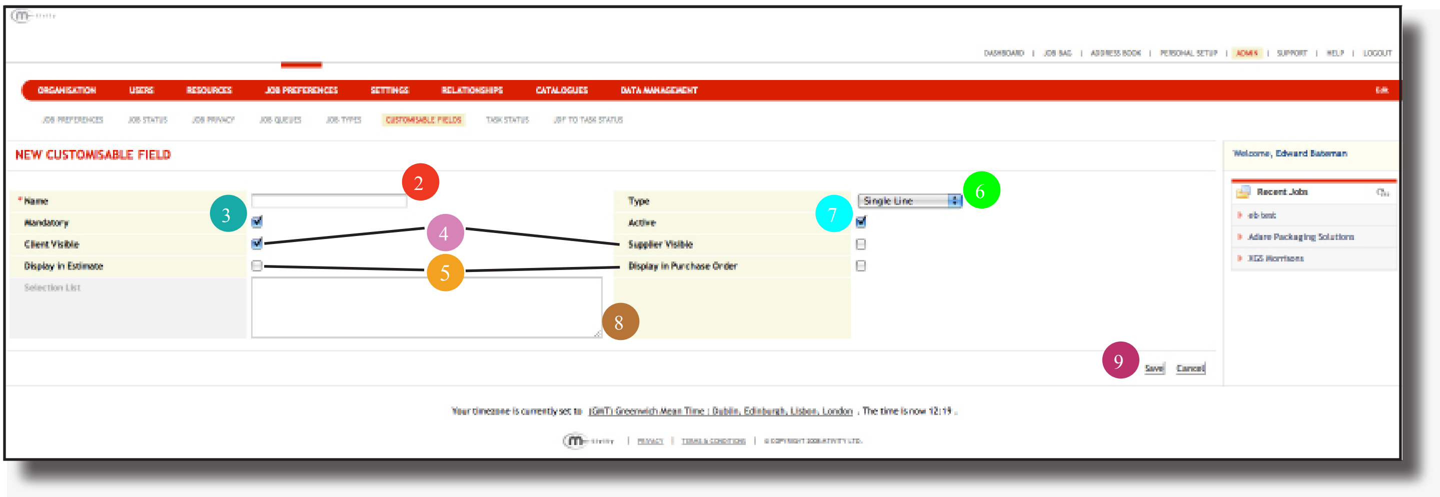


Admin > Job Preferences > Customisable Fields

Displays all Customisable fields created for the Company. Customisable fields appear on the New Job screen and are useful for adding additional fields to the Job Summary page as needed.

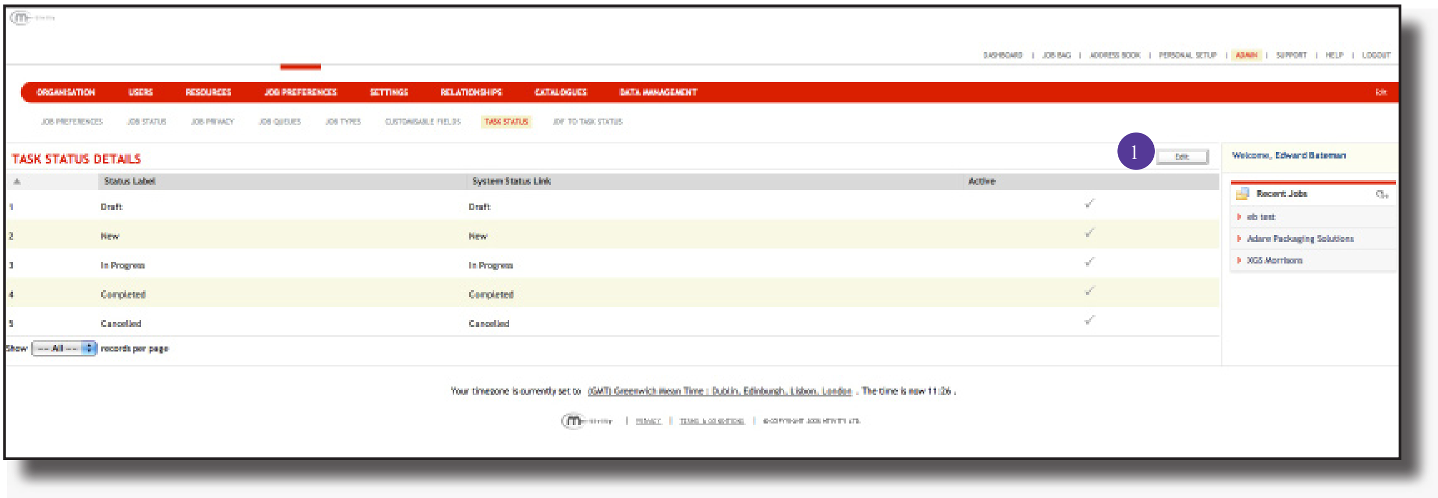
1 Click Tools > New to create a new Customisable field.

New Customisable Field



1 Admin > Job Preferences > Customisable Fields > Tools > New.
2 Enter the name for the Customisable field (this will appear on the new Job page).
3 Select if the field is mandatory or not.
4 Select if the field is visible to the Client and/or the Supplier.
5 Select to display the field in Estimate and/or Purchase Order.
6 Select Type: Single Line, Multiple Line, Single Selection or Multiple Selection.
7 Select if the field is active or not.
8 If Type is single or multiple selection - enter in Selection List in box provided (separate each item with carriage return)
9 Click Save to save the Customisable Field.

Admin: Job Preferences Task Status

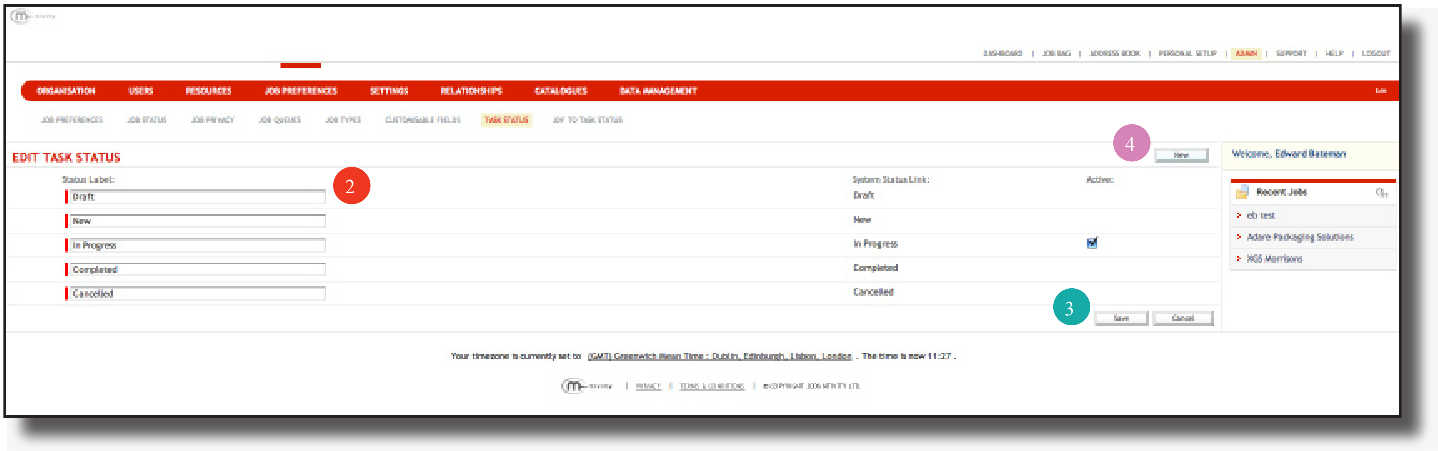


Admin > Job Preferences > Task Status

Displays a list of all system and personally defined Task Statuses for the company.

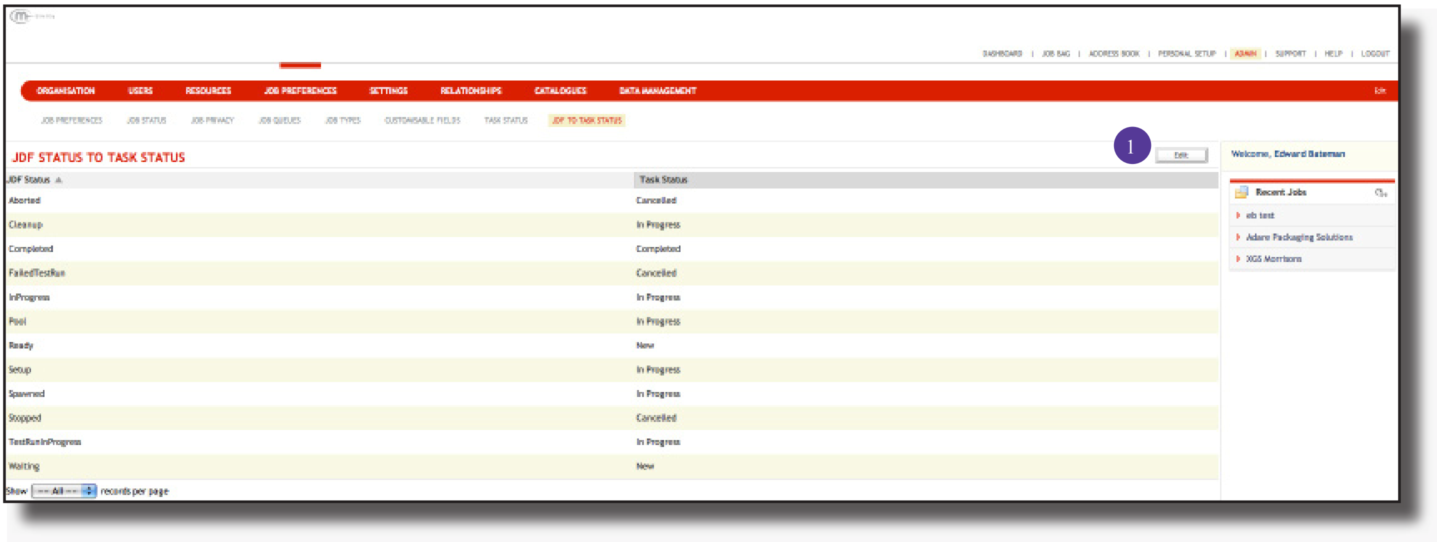
1 Click > Edit button to change any Task status labels.

Edit Task Status Label



1 Admin > Job Preferences > Task Status > Edit button.
2 Edit the Task Status Labels as needed (these will be visible on the task).
3 Click Save to save the new Task Status Labels.
4 Click the New Button to create a new Task Status.
5 (NOTE new task status will always be mapped to a System “In Progress” status).

Admin: Job Preferences JDF to Task Status

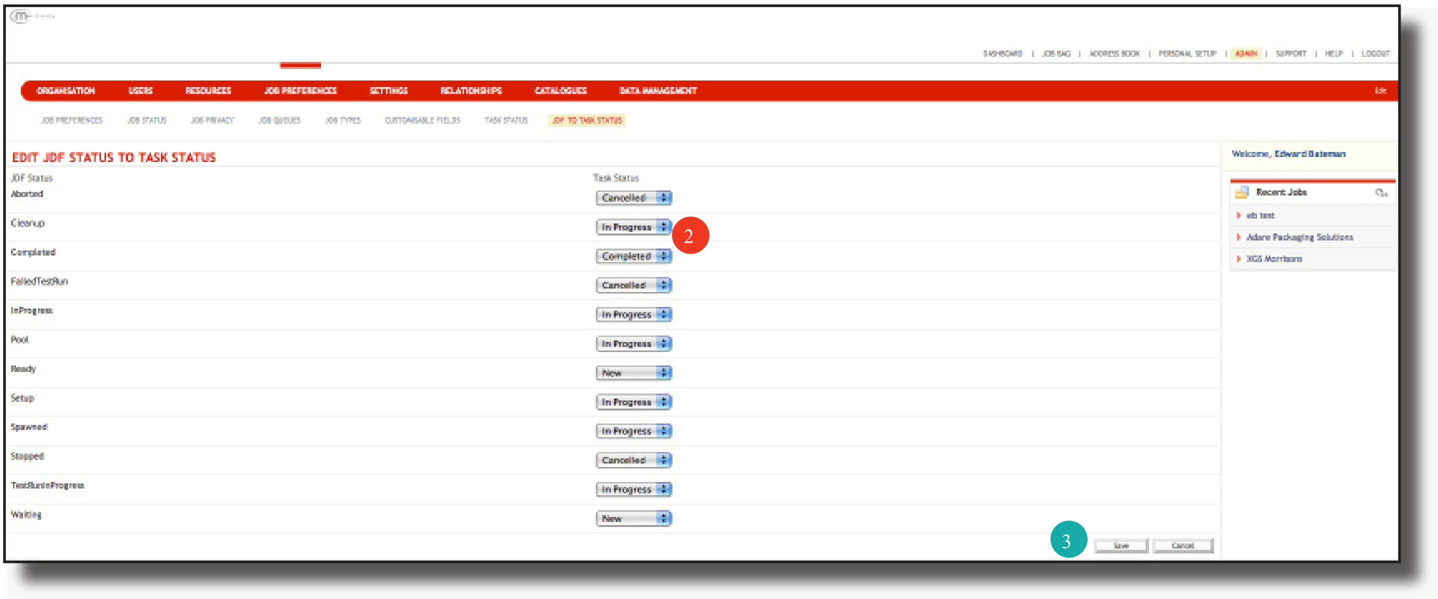


Admin > Job Preferences > JDF to Task Status

Displays a list of defined JDF status and corresponding Task statuses. If the company is set up for JDF and Mtivity interfaces with an external application to collate job and task details, then the task status is used to trigger updates to job statuses in either Mtivity or the external application.

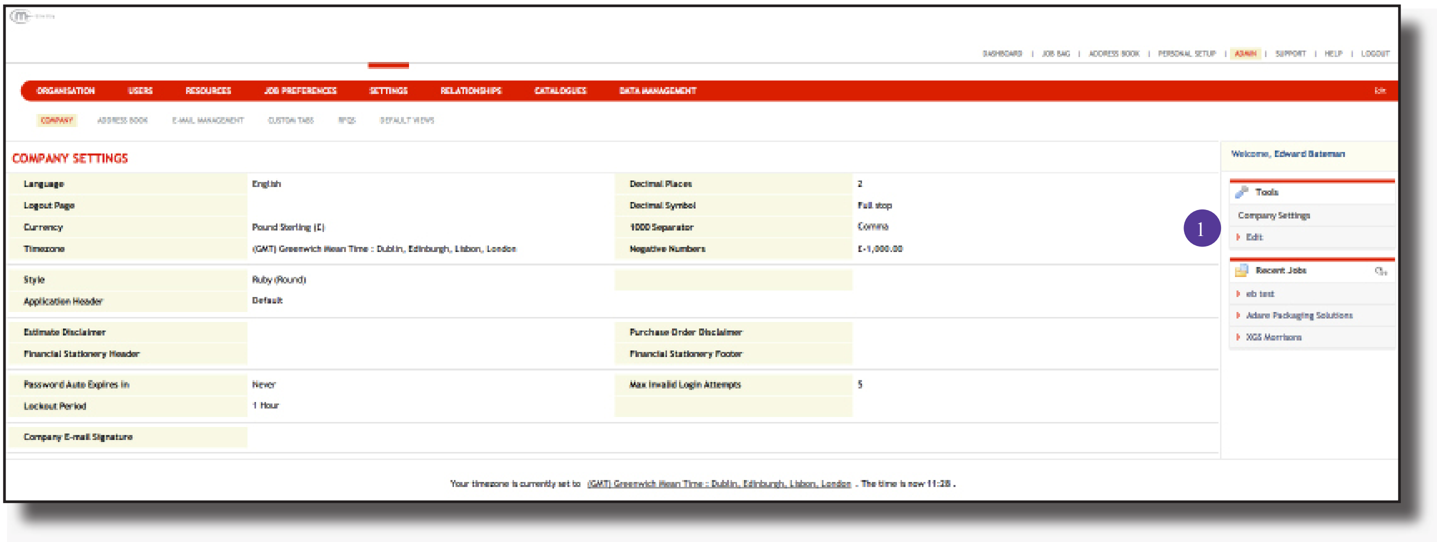
1 Click > Edit button to change the Task status that are mapped to the relevant JDF status.

Edit JDF to Task Status



1 Admin > Job Preferences > JDF to Task Status > Edit button.
2 Edit the Task Status by selecting from the available list in the drop down.
3 Click Save to save the JDF to Task Status.

Admin: Settings Company

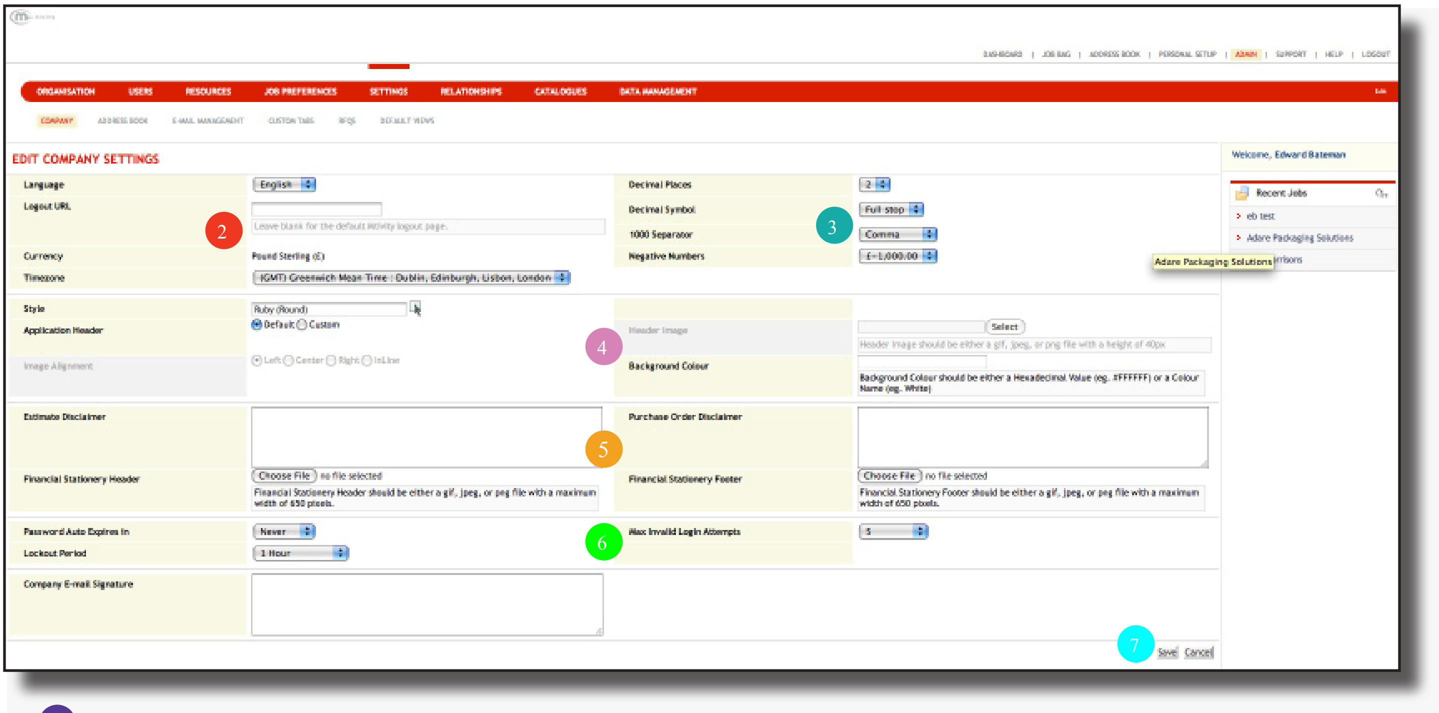


Admin > Settings > Company

Displays the Company Settings that apply to all new and existing users by default. (NOTE users can change their personal settings in Personal Setup > Settings)

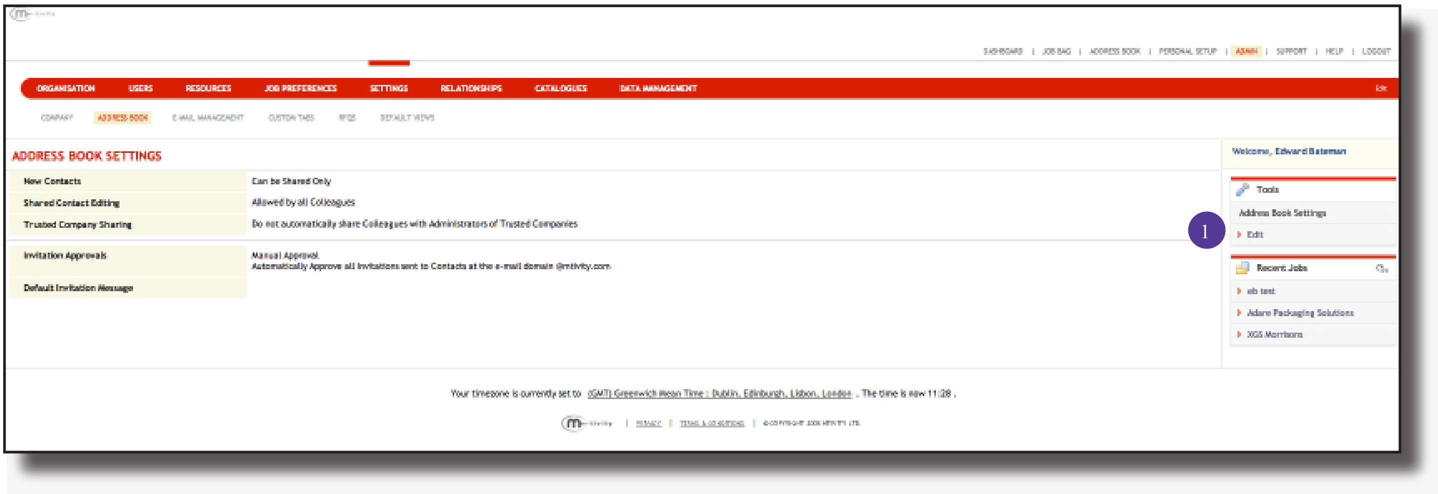
1. Click > Tools > Edit to change any of the Company Settings.

Edit Company Settings



1. Admin > Settings > Company > Tools > Edit
2. Edit Company Settings for Language, Logout URL and Timezone.
3. Edit Company Settings for Decimal Place, Symbol, 1000 separator and negative numbers.
4. Select Style and upload custom header image for company.
5. Enter Estimate and Purchase Order disclaimers and select stationary header and footer images.
6. Specify Password security - Expiry date, Lockout period and number of invalid login attempts.
7. Click Save to save Company Settings.

Admin: Settings Address Book

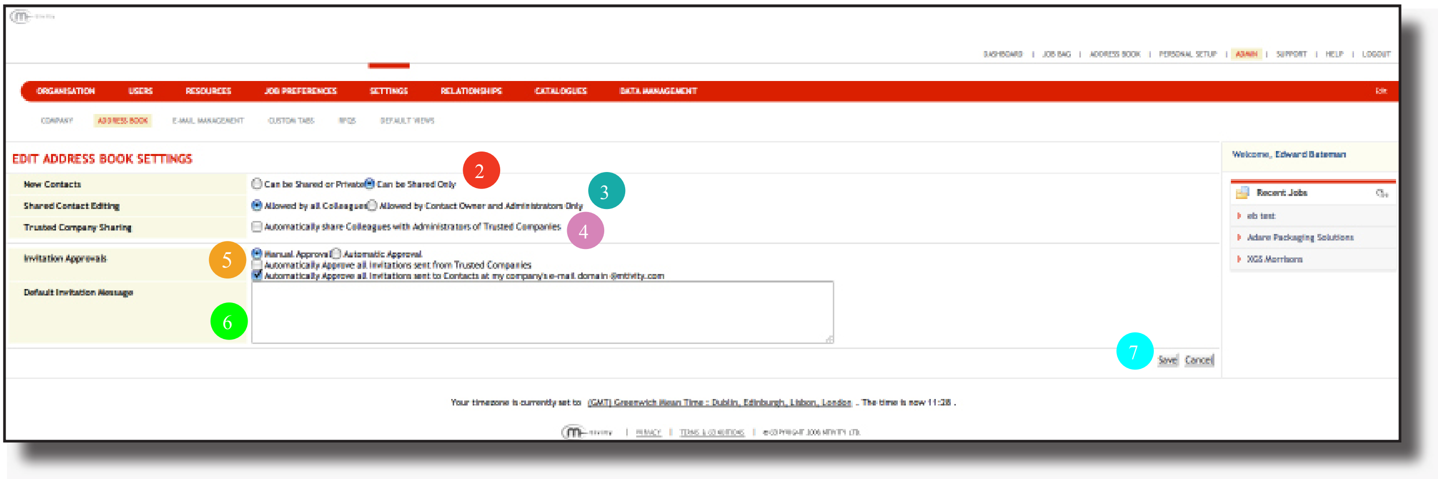


Admin > Settings > Address Book

Displays Company Settings for Contacts in your address book.

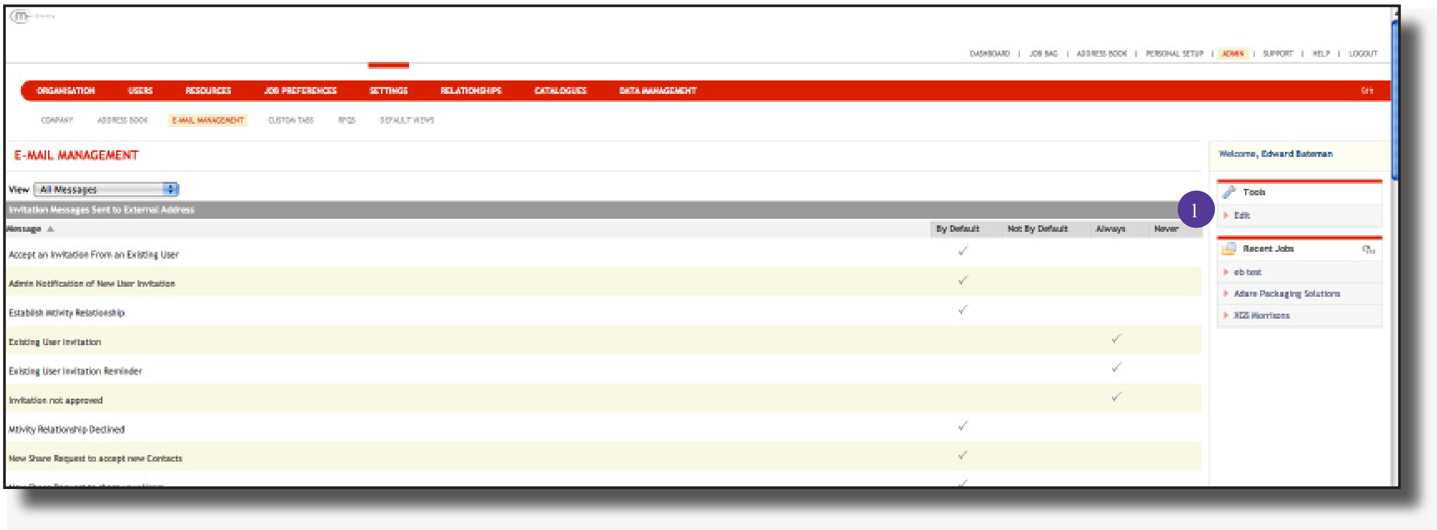
1. Click > Tools > Edit to change any of the Address Book Settings.

Edit Address Book Settings



1. Admin > Settings > Address Book > Tools > Edit
2. Select if New Contact can be Shared or Private, or Shared Only.
3. Specify if Shared Contacts can be edited by all colleagues, or Admin users and owners only.
4. Select to automatically share colleagues with Trusted Company Admins (see Admin > Relation shops > Accounts).
5. Invitation Approval: If Manual is selected - all invitations need to be accepted by the Company Admin. If Automatic - all invitations will automatically be approved.
6. Enter default invitation message that will be displayed in all invitation e-mails to new contacts.
7. Click Save to save Address Book Settings.

Admin: Settings E-Mail Management

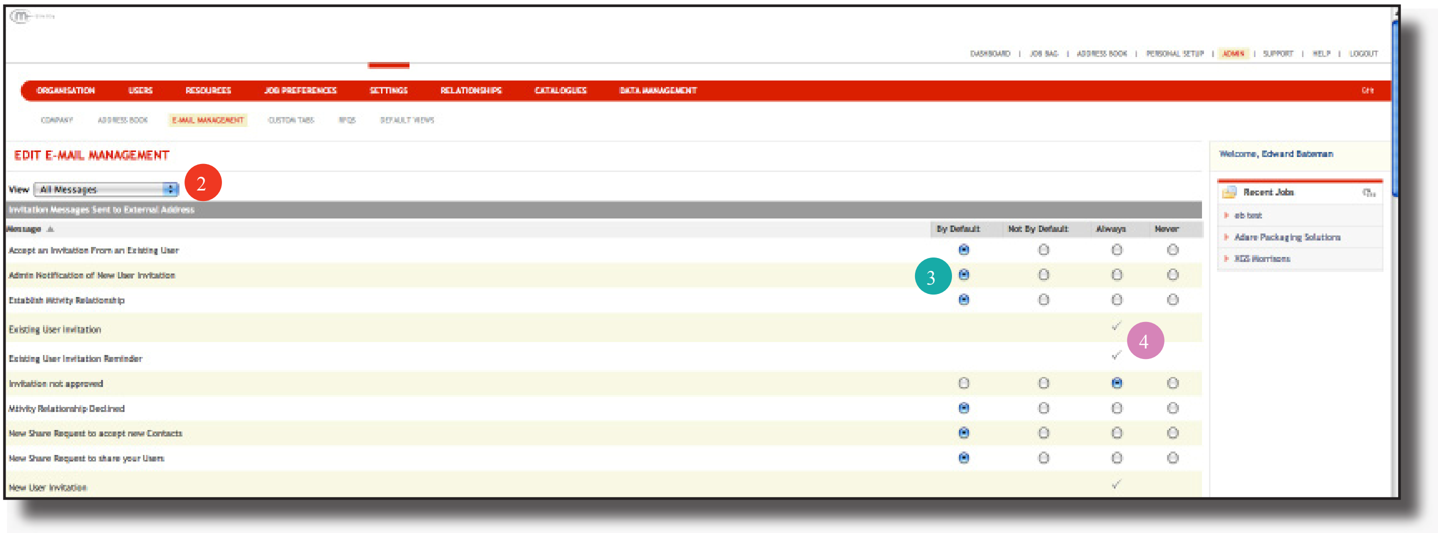


Admin > Settings > E-Mail Management

Displays what e-mail messages will be sent to external e-mail addresses.

1. Click > Tools > Edit to change which e-mails are sent from Mtivity.

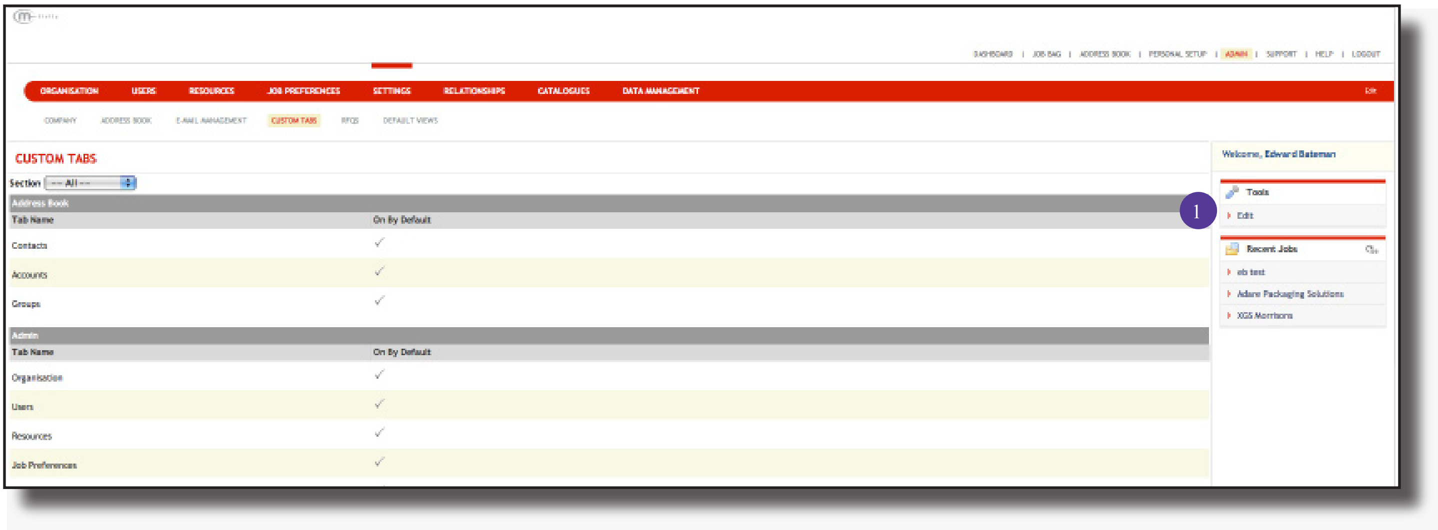
Edit E-Mail Management Settings



1. Admin > Settings > E-Mail Management > Tools > Edit
2. You may filter the view by message type.
3. Select what e-mails will be sent by default, not by default, always or never.
4. NOTE: Some messages are company e-mails that will always be sent and may not be edited.

Click Save to save the new E-Mail Management settings.

Admin: Settings Custom Tabs

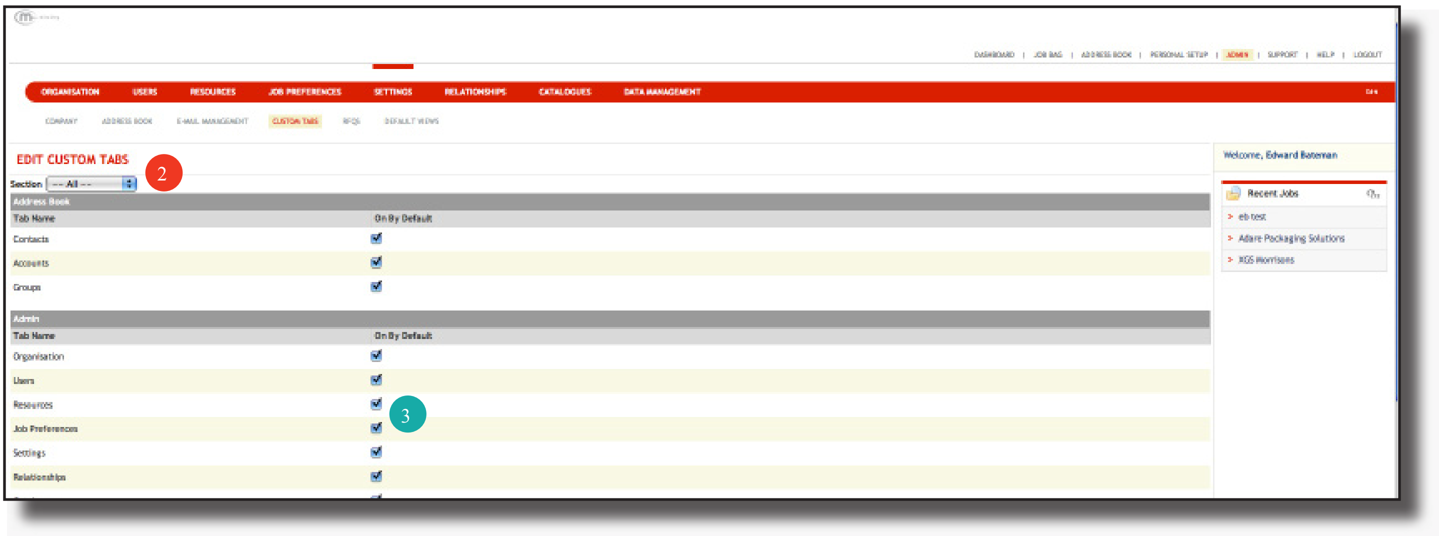


Admin > Settings > Custom Tabs

Displays what Custom Tabs will be display for all existing and new users by default (NOTE: users can edit what tabs will appear by clicking on the in line edit link on the Tab bar).

1 Click > Tools > Edit to change the tabs to appear by default for the company.

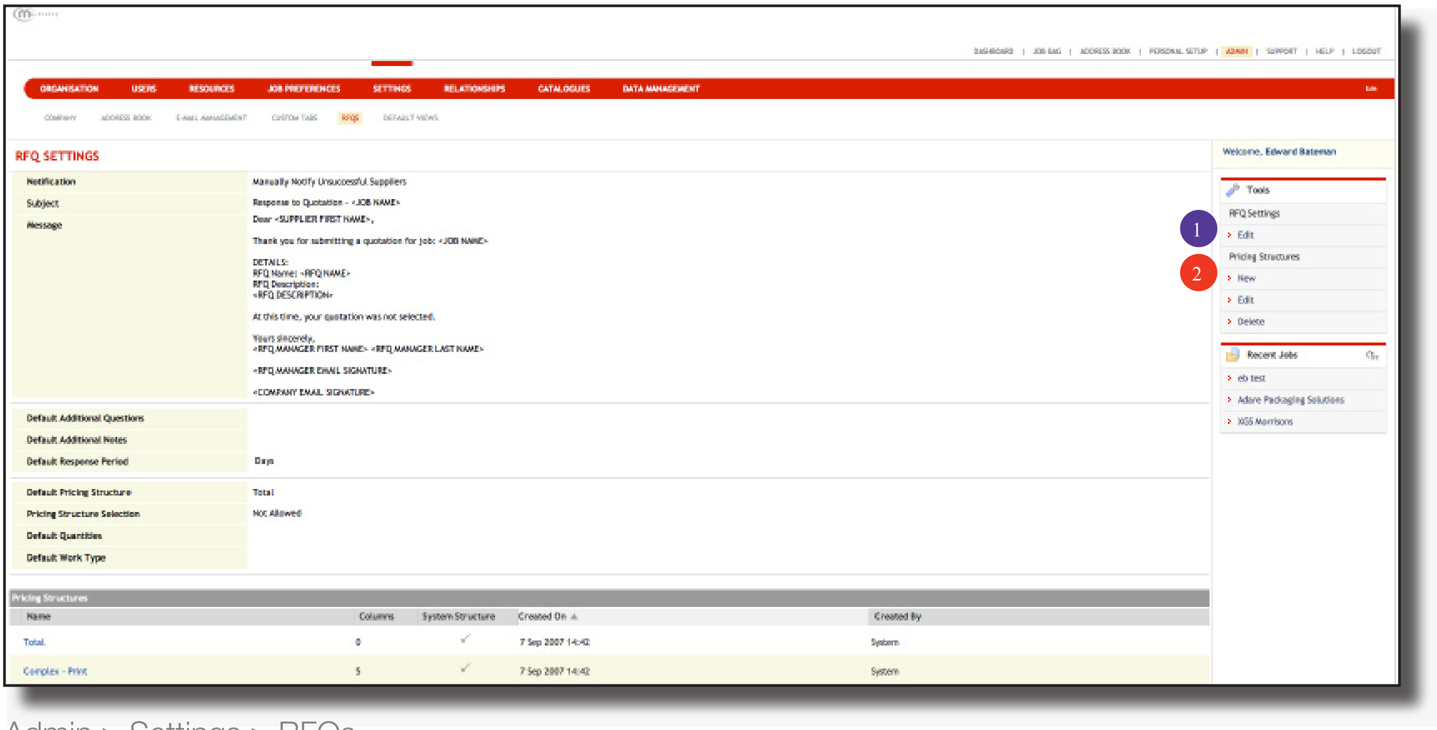
Edit Custom Tabs



1 Admin > Settings > Custom Tabs > Tools > Edit
2 You may filter the view by sections of the application.
3 Select what Tabs will be visible by default to all existing and new users.

Click Save to save the Custom Tab setup.

Admin: Settings RFQs

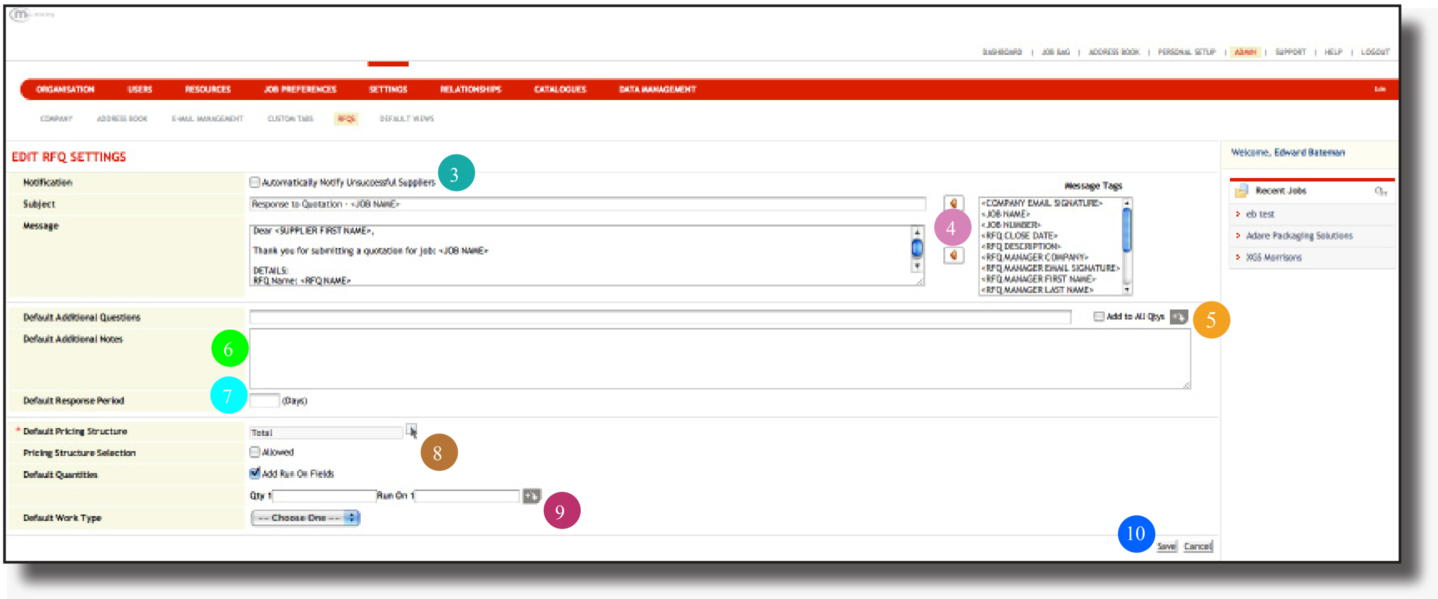


Admin > Settings > RFQs

Displays RFQ settings and Pricing Structures for RFQs for the Company.

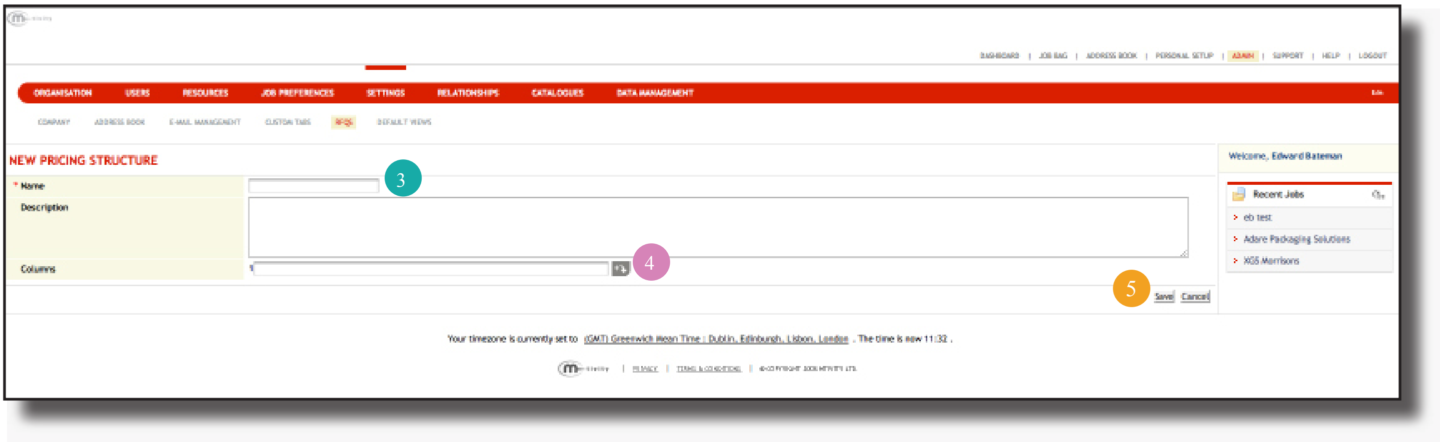
1 Click > Tools > RFQ Settings > Edit to edit RFQ settings for all new RFQs created.
2 Click > Tools > Pricing Structure > New to create a new Pricing Structure.

Edit RFQ Settings



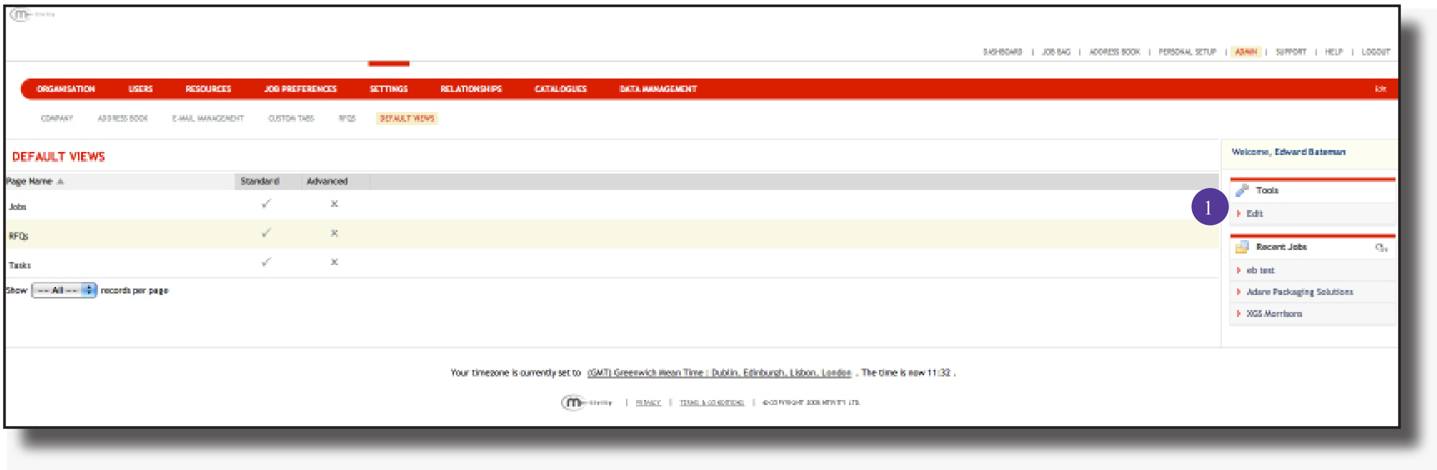
1 Admin > Settings > RFQ > Tools > Edit
3 Notification - check to automatically notify unsuccessful suppliers.
4 Select tags to create a custom default message to be sent to unsuccessful suppliers.
5 Specify any additional questions (any number of additional question may be added).
6 Enter any default notes to appear for the Supplier.
7 Enter the default response period.
8 Select Pricing Structure and set if supplier can choose a different Pricing Structure.
9 Enter the Default Quantity(s) to appear on all RFQs and select a Default Work Type.
10 Click Save to save RFQ settings.

Admin: Settings RFQs New Pricing Structure



2 Admin > Settings > RFQs > Tools > Pricing Structure > New
3 Enter in a name for the Pricing Structure (and description if needed).
4 Add as many columns to the new Pricing Structure by clicking on the add row icon.
5 Click Save to save the new Pricing Structure.

Admin: Settings Default Views

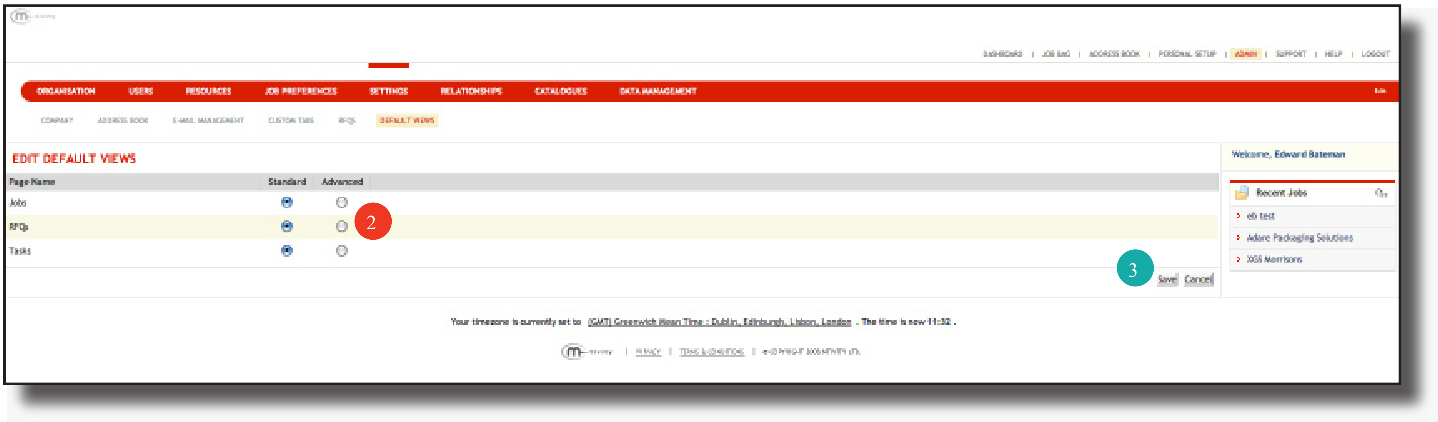


Admin > Settings > Default Views

Displays what default views will be displayed when users of the company create a new Job, RFQ or Task. Standard View is a simplified view and Advanced View contains additional fields that might be of benefit to the user.

1. Click Tools > Edit to change what default views appear for all existing and new users.

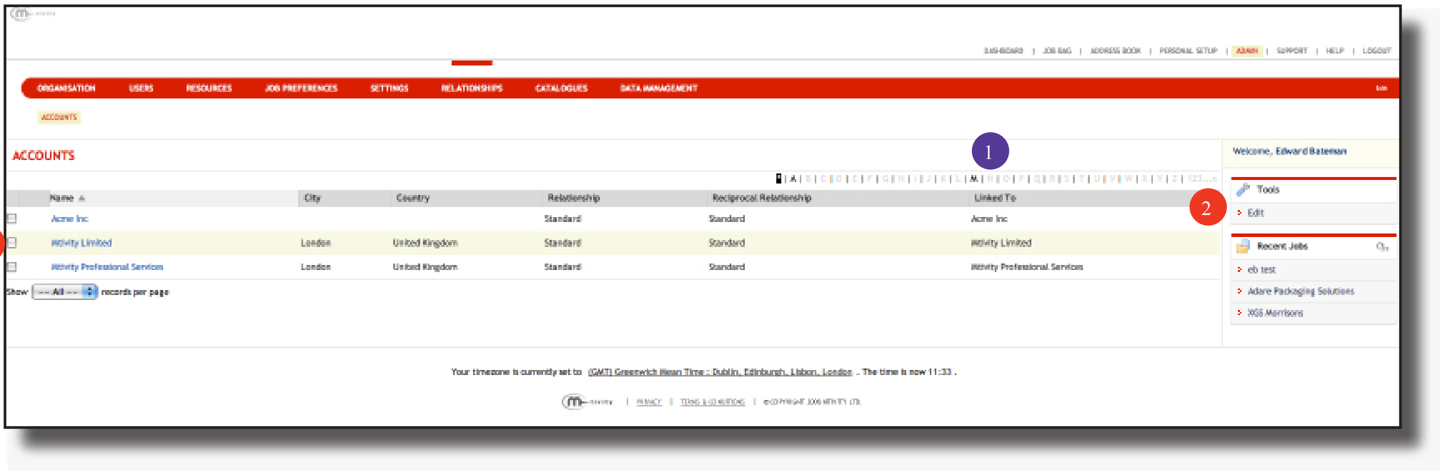
Edit Default Views



1. Admin > Settings > Default Views > Tools > Edit.
2. Select what default view will appear for new Jobs, RFQs and Tasks.
3. Click Save to save the Default views for the company.

NOTE: Users will be able to change to the other view by clicking on the Standard or Advanced links at the top of the 3 page when creating a new Job, RFQ or Task.

Admin: Relationships Accounts

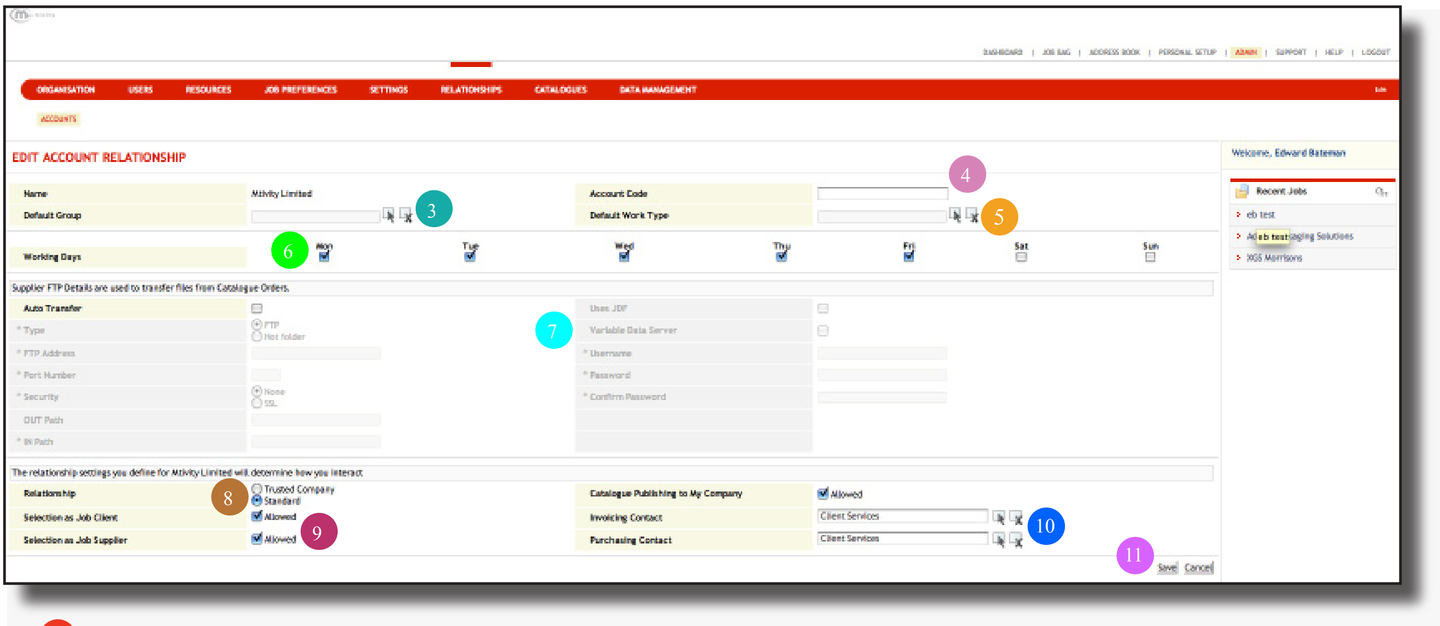


Admin > Relationships > Accounts

Displays all the other Mtivity Accounts that you have a relationship with.

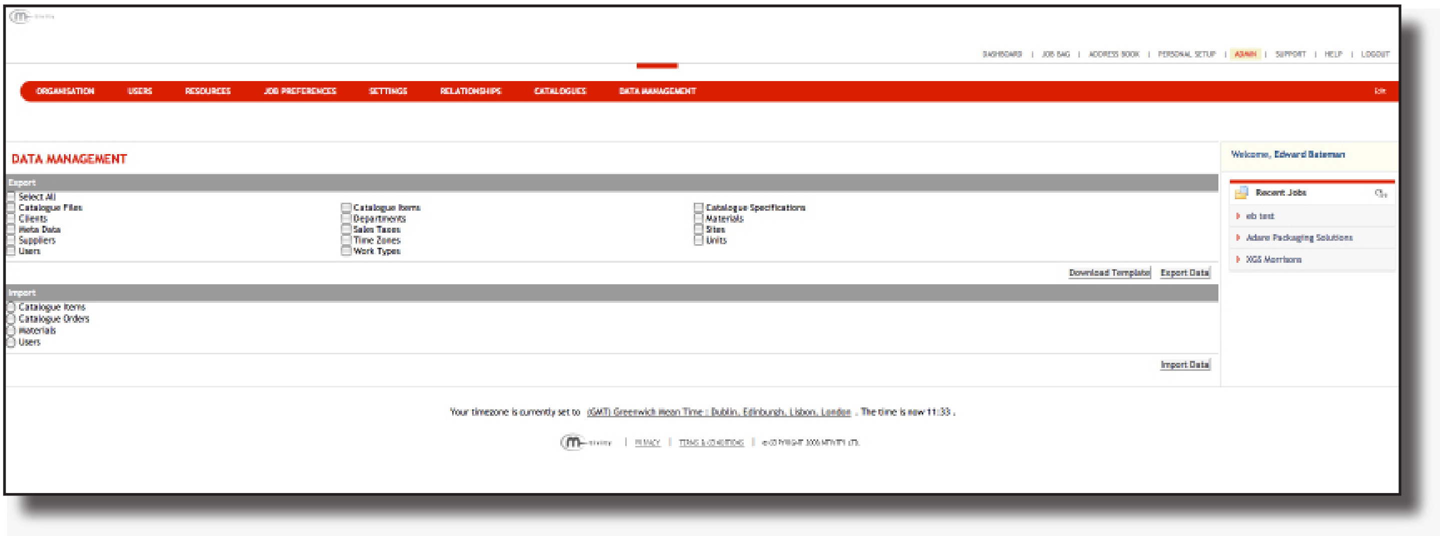
1. You can filter through the accounts by clicking on the Alphabet letters to sort by selected account name.
2. Check the check the check box in front of the account and click Tools > Edit to edit the account relationship.

Edit Account Relationship



2. Admin > Relationships > Accounts > Select Account > Tools > Edit.
3. Select a default group for the Account.
4. Enter in an Account Code.
5. Select the default work type.
6. Specify the Working Days for the Account by checking the relevant day boxes.
7. Auto Transfer and FTP details appear here.
8. Mark the Account as Trusted or Not (see Admin > Settings > Address Book).
9. Select if Account can be set as Job Client and/or Job Supplier.
10. Select the appropriate contacts as the Invoicing and Purchasing contacts for the Account.
11. Click Save to save the Account Relationship details.

Admin: Data Management



Admin > Data Management

The Data Management function allows you to export date held within your Mtivity Account. The data is presented in CSV file format. You can manipulate the date and then re-import some date back into Mtivity. This reduces time needed to create for example new Materials, or to manually invite new users into the account.

Separate user guides are available for this on request.