ExoLink's Online Training Guide

Training Documentation
Version 2.1

ExoLink Corporation
401 East Corporate Drive, Suite 101
Lewisville, Texas 75057-6426
http://www.exolink.com
(972) 538-6700

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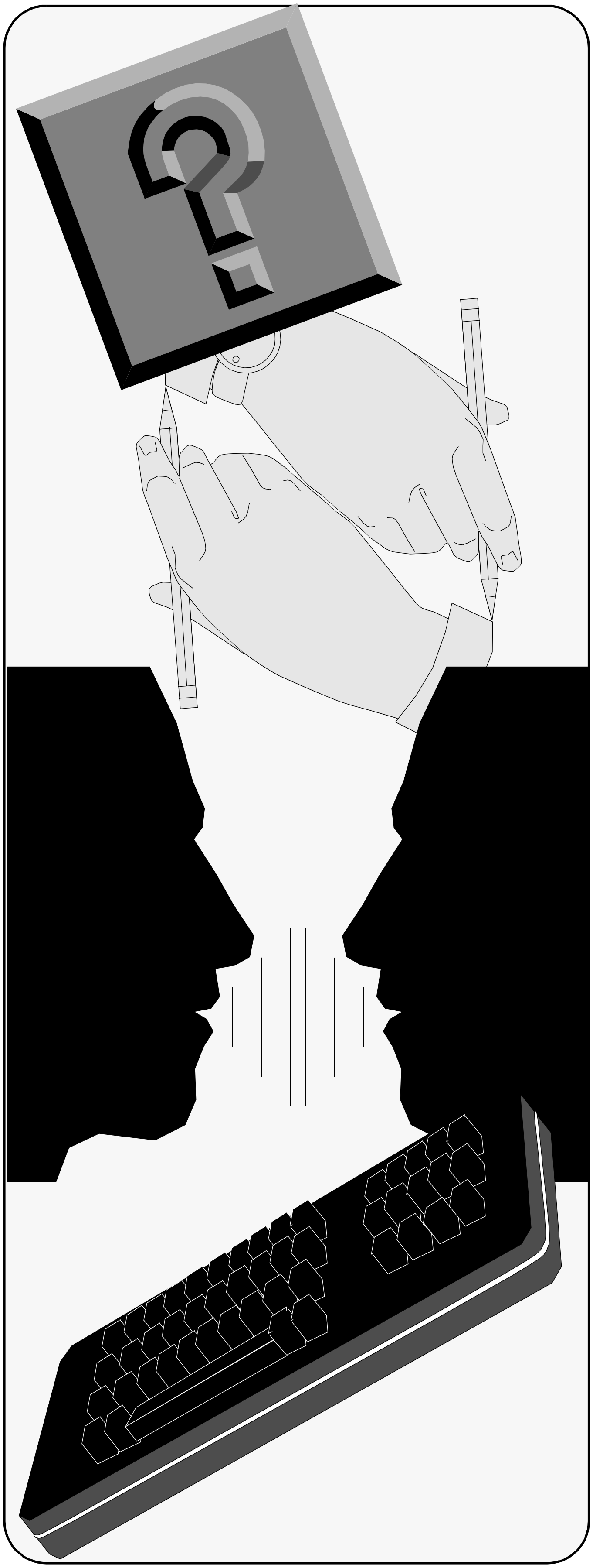


Chapter 1

Preparing for Training

Objectives

This chapter is designed to assist you, the trainer, with preparing for your training session. The following topics are discussed:

- *Prerequisites*
- *Planning*
- *Preparation*
- *Presentation Skills*

A. Introduction

Welcome to the world of ExoLink's online solution.

Prior to beginning your review and use of this document, you should have a working knowledge of the following:

- Microsoft® Windows™ 95/98/NT/2000
- A mouse and standard Windows' menus and commands
- Netscape Communicator (Netscape) version 4.76 or higher or Microsoft® Internet Explorer (IE) versions 5.0 or higher

Additionally, you should know how to relate to students in a classroom environment.

The text that you just read identifies the information you should understand prior to teaching others about the application. The process of taking a train-the-trainer course prepares you for teaching others on the material you are about to learn.

Prerequisites

Ideally, an audience analysis and a job task analysis should precede every training course. Prior to preparing this training material, these analyses were conducted to assist with identifying the following:

- Tasks the students will face daily
- Concepts the students need to understand
- Activities the students need to learn to complete their tasks
- Methods for measuring how well students have learned this information

B. Planning

Planning is an essential component to a successful training session. Looking ahead often alleviates most common pitfalls. This section addresses those tasks you should complete in preparation for instructing users.

Planning Schedule

At least one week prior to training, perform the following:

- Verify items on your checklist (refer to *"Planning Checklist" on page 1-4*).
- Verify the availability of all on-call personnel.
- Rehearse your presentation.

The day before the training, perform the following:

- Ensure that the training facility has been properly equipped and readied.
- Test all equipment and supplies (i.e., PCs, projectors, white boards, markers, etc.) to ensure they are in working order.
- Review your course material to ensure your understanding and flow of information.

An hour before the training, perform the following:

- Place handouts and other course materials in the room.
- Retest equipment to ensure that everything works correctly.
- Write your name and course name on the white board, blackboard, or easel.
- Ensure that you are logged on your network or connected to your internet service provider (ISP).

Planning Checklist

Audience

- Determine the number of people attending the session.
- Contact and confirm attendance.
- Try to identify the extent of their knowledge of PCs and the operating system (i.e., Windows).

Facilities and Equipment

- Verify the room location and schedule.
- Verify the availability of sufficient PCs for the class attendees with necessary hardware as described on *"Planning" on page 1-3*.
- Identify and obtain the aids and supplies you will use, such as demo PCs, overhead projectors, foils, white board, blackboard, markers, chalk, erasers, easel with pad of paper and markers, and name cards, as needed for your training session.

Class Materials

- Verify that you have all the handouts needed; obtain extra copies as a safeguard.
- Verify that Windows 98/NT/2000, Netscape Communicator or Microsoft IE v 4.0 (or higher), Java Plug-in v 1.3, Adobe Acrobat Reader v 3.01 (or higher), Java Web Start 1.0.1, are loaded on all PCs.

Contingency Planning

Ensure that you have access to a photocopy machine in case a shortage of class materials occurs.

Develop backup plans (other activities) to cover topics from the overhead with foils, white board, or easel in case of equipment failure.

C. Preparation

Preparation, in the form of rehearsal, is especially critical for ensuring that training is delivered in an effective and comprehensive manner.

Mental Preparation

Think about your presentation; imagine yourself delivering the material.

Visualize yourself delivering your presentation.

Anticipate how you will answer questions you had as well as other questions your audience may have.

Prepare a review list of questions for each lesson:

- Did you cover all topics?
- Did you touch on all objectives?
- Did you remember to ask for questions?
- Did you remember to offer a break?

Support Materials

Review your support materials (e.g., *Using ExoLink Online*) to familiarize yourself with their content and layout. Making reference to specific sections of a supporting document should be well thought out and planned. Have specific pages marked for easy access in a personal copy.

Confidence

If you are well-prepared, you will be confident, perform well, and enjoy your teaching experience.

Agendas

As the instructor, you should prepare an agenda for each class. This agenda should cover the all aspects of the day including the welcoming discussion, overview, breaks, and synopsis of material covered.

D. Presentation Skills

Voice

Speak clearly, loudly, and slowly; vary the pitch of your voice; and do not let your voice trail off at the end of sentences. Try to be enthusiastic with your speech (not monotone); you want your students awake and alert.

Introductions

Introduce yourself, state the name of the course and its objectives, and have each audience member introduce themselves.

Pass around the attendance sheet, have the members write their names on the name cards, and ask if everyone can hear you.

Describe facility amenities (i.e., break room, rest room, available telephones, and other such items).

Presenting Each Segment

Define the purpose/objective of each segment as you begin and explain how the segment fits in with the overall course.

When explaining concepts, use analogies and examples to which the audience can relate.

Summarize each segment before moving to the next one.

General Conduct

Face the audience, do not pace, and avoid turning your back to the audience. Do not play with things in your hands or pockets.

Scan the audience and make eye contact; observe their reactions. Use your observations to determine which members may be confused, or simply do not understand the material. Use these members as a guide for providing extra help and attention to those who may require assistance. Periodically check each student's progress.

Encouraging and Managing Class Participation

Stop periodically to ask for questions. When you receive a question, repeat it to the entire class first. Do not hold one-to-one conversations except in hands-on sessions.

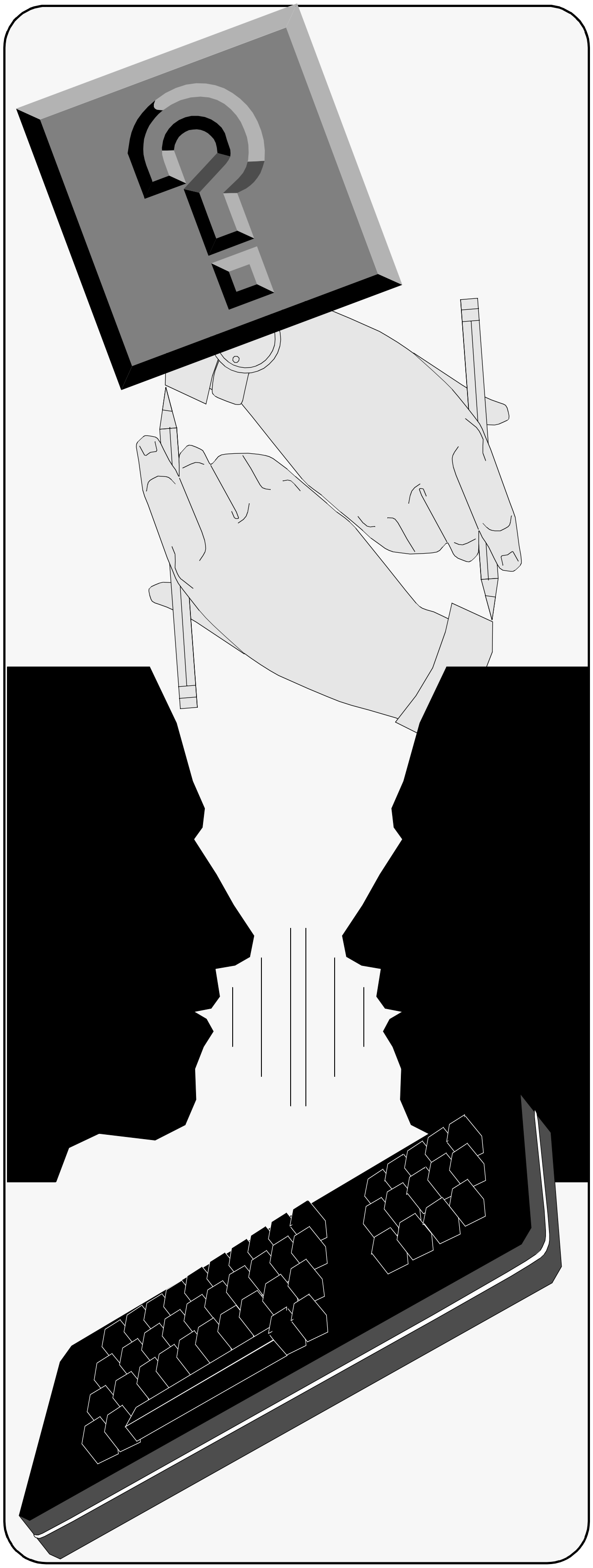
After you answer the question, ask "Does that answer your question?" If not, repeat the question in your own words to ensure that you understood the question. Then, attempt to answer the question again.

If you do not know an answer, say so. Tell the class that you will try to find the answer outside the session. Perhaps begin a list of questions on a board or easel so everyone keeps track of the outstanding questions. Be sure to follow up and let the class know what you found.

If a question is beyond the scope of the course, say so and continue.

Controlling the Pace and Direction of the Course

Follow the agenda and time schedule; do not disagree with a student or permit an audience member to lead the class into a digression.



Chapter 2

Overview

Objectives

This chapter is designed to introduce you to ExoLink's online solution, supporting documentation, and general "how to" information. The following topics are discussed:

- *Introduction*
- *What is ExoLink's Online Solution?*
- *Using ExoLink Online Reference Document*
- *Navigation*
- *Common Buttons*
- *Action Items*
- *Business Events*
- *Common Tasks*

A. Introduction

ExoLink designed this training guide to teach you the general skills required to understand, use, and train others on using and understanding the application.

Using this Training Guide

This guide is a companion document to *Using ExoLink Online* reference document. You will find yourself referring to *Using ExoLink Online* on a frequent basis. Take the time to familiarize yourself with its contents, and keep it handy.

From this training, you should develop an understanding of the following major objectives:

- Understanding the application and associated terminology
- Processing transactions concept
- Submitting transactions concept
- Completing tasks correctly

The remainder of this chapter provides an overview of *Using ExoLink Online* and includes training scenarios to be reviewed in class.

The contents for the remainder of *ExoLink's Online Training Guide* is as follows:

- *Notifications*
- *Receiver Rejects*
- *Validation Exceptions*
- *Required Manual Completions*
- *Reports*
- *Administration*

Covering Additional Material

In addition to referring to *Using ExoLink Online* and *ExoLink's Online Training Guide*, you also need to have a general understanding of your energy industry and market information. This information will likely be specific to your state, market, and even service class, such as gas or electric. It is important to understand that this training material does not provide industry training. *Using ExoLink Online* provides you a short overview of the deregulated utility industry, but no formal energy industry discussion. Please ensure that you receive some industry training at some point to build your foundation of knowledge.

B. What is ExoLink's Online Solution?

ExoLink's online solution is a transaction distributor that facilitates integration of dissimilar computer systems between energy service providers (ESPs) or competitive retailers (CRs); utility distribution companies (UDCs), or transmission or distribution service provider (TDSP); and ExoLink's application. This tool provides a unified framework for the electronic exchange of customer-related data and communications between ESPs and UDCs.

ExoLink's online solution is accessed through a browser and supports both Microsoft IE and Netscape, versions 4.0 or newer. Additional basic requirements for using the application include the following:

- Microsoft Windows 95/98/NT/2000 operating system
- Pentium 90 or greater
- At least 64 MB ram
- At least 10 MB free hard drive space
- An Internet connection
- Java Web Start 1.0.1

Local administrator authority is needed over the PC when installing Java Web Start, which is required for running ExoLink's online solution.

C. *Using ExoLink Online* Reference Document

Using ExoLink Online describes ExoLink's online solution and your interaction with the application. After reviewing *Using ExoLink Online*, you should have a good understanding of the application and its many functions that assist you in managing the transactions associated with specific energy markets. These transactions are not addressed within this training guide.

Highlights of *Using ExoLink Online* are as follows; ensure that you review each of these chapters based on your experience and need:

- **Overview -** Provides an overview of the utility industry and ExoLink's online solution, and how ExoLink's solution relates to the utility industry.
- **Getting Started** - Provides instructions to running Java Web Start, an overview of accessing, logging on, and exiting the application, and a review of standard Windows conventions.
- **Performing Tasks** - Provides an overview of the major tasks performed within ExoLink's online solution, such as searching and working with Notifications, Receiver Rejects, Validation Exceptions, and Required Manual Completions.
- **Glossary** - Defines terms and acronyms used within the utility industry, as well as application-specific terminology.

D. Navigation

Navigating through ExoLink's online solution follows the same basic concept of navigating through any Windows-based application. The main issue to remember is that ExoLink's online solution is an Internet application; hence, you must access the Internet to access the application.

The following exercise teaches you how to access ExoLink's online solution via the Internet.

Exercise D–1: Accessing the Application

#	Action	Result
1.	Open your Internet browser.	Either Netscape or Microsoft IE (version 4 or higher).
2.	In the uniform resource locator (URL) field, type `http://www.exotran.com`.	From the displayed web page, click the appropriate link to launch Java Web Start and ExoLink's online solution.
3.	From the displayed web page, click the appropriate link to launch Java Web Start and ExoLink's online solution.	The application displays the logon dialog box. If you have not yet loaded Java Web Start, refer to *"Accessing ExoLink's Online Solution" on page 2-2*.

Now that you have accessed the logon dialog box, the following exercise teaches you how to logon the application.

Exercise D–2: Logging on the Application

#	Action	Result
1.	Type your User ID in the **User ID** field.	This field is case sensitive. If your User ID was created with all lowercase letters, it must be typed in lowercase.
2.	Type your Password in the **Password** field.	This field is case-sensitive. If your password was created with all lowercase letters, it must be typed in lowercase.

Exercise D–2: Logging on the Application

#	*Action*	*Result*
3.	Click **OK** to proceed with accessing the application.	If you do not want to log on, click **Cancel**. The application verifies your User ID and Password. If correct, the main window appears. If your log on information is incorrect, the application displays a Logon Failed error message. If necessary, re-enter the log on information and click OK.

The main window can be resized, moved, minimized, and maximized by pointing, clicking, and dragging your mouse on the appropriate buttons, as can most windows. Refer to *Using ExoLink Online* for general Windows information. Exercises D - 3 through D - 8 assist with learning specific windows-based activities. You may skip these exercises and move directly to *Business Events* if you are familiar with window functions.

This exercise assumes that you have logged on ExoLink's online solution and have the main window displayed.

Exercise D–3: Minimizing a Window

#	*Action*	*Result*
1.	To minimize the main window, click .	The window is minimized and displays as a *task bar* button. The task bar is the bar displayed at the bottom of the Windows screen.
2.	Re-display the minimized window by clicking **ExoTran.**	The main window displays in its previous state. The title of the button and window is based on your logon ID.

The next exercise assumes that you have logged on ExoLink's online solution and have the main window displayed.

Exercise D–4: Maximizing a Window

#	Action	Result
1.	To maximize the main window, click .	The window is maximized and completely fills the screen.
2.	Return the maximized window to its previous state by clicking .	Note that the **Maximize** button has changed to indicate its current state. Once clicked, the main window displays in its previous state.

The next exercise assumes that you have logged on ExoLink's online solution and have the main window displayed.

Exercise D–5: Exiting or Closing the Application or Active Window

#	Action	Result
1.	To exit the application or active window, click .	The application or active window closes.

From the main window, accessing additional application windows, panels, and drop-down boxes is a matter of selecting the appropriate items.

The next exercise assumes that you have logged on ExoLink's online solution and have the main window displayed.

Exercise D–6: Selecting from a Drop-Down List

#	*Action*	*Result*
1.	In the **Action Items** panel, select the drop-down list box arrow next to the **Display** option.	The application displays a drop-down list box that allows you to make a selection. In this case, your selection would be to specify a display order for the action items (either by date or type).

All drop-down list boxes work in the same fashion—they all display a list of options from which you can make a selection.

ExoLink's online solution employs a standard, collapsible-tree structure approach to expand and minimize action items. This feature is available regardless of the sort method selected, either by name or date.

The next exercise assumes that you have logged on ExoLink's online solution and have the main window displayed.

Exercise D–7: Expanding an Action Items Tree

#	*Action*	*Result*
1.	In the **Action Items** panel, click the plus sign (+) preceding a transaction type or date.	The application expands the structure, displaying all the transactions within that group.

The next exercise assumes that you have logged on ExoLink's online solution and have the main window displayed.

Exercise D–8: Collapsing an Action Items Tree

#	*Action*	*Result*
1.	In the **Action Items** panel, click the minus sign (-) preceding a transaction type or date.	The application collapses the structure, hiding all the transactions within that group.

E. Common Buttons

ExoLink's online solution makes use of many buttons. Some of the more common buttons and their functionality are discussed as follows:

- **Home**: Returns you to the main window.

Note: Clicking **Home** does not close the window from which you click **Home**. Ensure that you have saved any changes, if required, prior to clicking **Home**.

- **Event Summary**: Displays the **Event Summary** window. Use this tool to review the event in which a transaction occurs.
- **Refresh**: Refreshes the data currently displayed on the window.

F. Action Items

An action item is a transaction that requires your attention. This attention may simply be acknowledging the receipt of the transaction, or performing some other task, and then acknowledging receipt. Transactions that appear in the **Action Items** panel are identified during application implementation.

Action items are displayed on the left side of the main window and are categorized as described in the following text.

Validation Exceptions

Transactions that have been processed and failed your company's validation rules.

Required Manual Completions

Transactions established by your company that require you to complete specific fields within ExoLink's online solution.

Receiver Rejects

Transactions rejected by the receiving market participant that require you to create and submit a new transaction within ExoLink's online solution.

Notifications

Transactions that require you to acknowledge receipt of the transaction. These transactions typically indicate that you need to perform some internal processing outside of ExoLink's online solution.

G. Business Events

During this training session, we focus on common business events. Note that each event can consist of a multitude of transactions. The intent is to develop your understanding of what activities you will most likely perform to complete specific tasks. Refer to *Using ExoLink Online* reference document for details concerning individual transactions.

Enrollment

Pertains to the enrollment options (i.e., enrollment, reschedule of an enrollment, or cancellation of an enrollment) for a new customer at a premise where service may have been provided previously, including a premise where service was provided previously, but requires a new meter. Enrollment also includes those transactions pertaining to the enrollment or cancellation of an enrollment for a customer that has existing service with another provider, and the customer is switching to a new ESP or provider of last resort (POLR).

Equipment Maintenance

Provides detail information concerning maintenance performed on physical equipment. Equipment maintenance includes those transactions associated with meter changes, meter registers, index changes, and physical device attribute changes.

Account Maintenance

Provides detail information concerning any maintenance performed on customer account data. Account maintenance includes those transactions associated with name changes, billing address changes, medical conditions, and social security (SS) or employer identification (EIN) changes.

Billing

Provides detail information concerning any data required to update billing information. Billing includes those transactions associated with meter reads and invoices, which include both usage and other charges, as well as read and invoice cancellations.

Terminations

Provides detail information concerning the discontinuance of services at a service point or premise. Terminations includes those transactions associated with meter pulls, terminations, final reads, and non-payment terminations.

Collections

Provides detail information concerning collection activities for a specified service point. Collections includes those transactions associated with non-payment notification, payment notifications, and write-off notifications.

Payments

Provides details of specific invoice payment batches. This pass-through transaction contains a payment total with an associated breakdown of payments by invoice.

Informational Requests

Pertains to those services that may be performed independently of any of the previously listed business events. For example, a consumption usage history update may be received by itself or with an acknowledgement of enrollment of a customer.

Note: Some markets do not allow informational requests—meaning that no secondary transactions may be received outside of a defined business event, as previously listed.

H. Common Tasks

This section of *ExoLink's Online Training Guide* focuses on tasks that you can expect to perform numerous times.

In this section, you will complete the following exercises:

- *Changing Your Password*
- *Creating a Customer Transaction from Scratch*
- *Searching for an ESI-ID*
- *Searching for a Customer Name*
- *Searching for a Premise*
- *Reviewing the Event Summary Window*

Closing a transaction is not covered as an exercise, as this activity is synonymous with simply closing a window. The act of closing a transaction only closes the transaction window and does not remove the transaction from the **Action Items** panel nor from any particular view. For details on closing a window, refer to*"Exiting or Closing the Application or Active Window" on page 2-7*.

This first exercise teaches you how to change your password, a task you should perform when you first access the application, as well as any time you receive a message stating the your password has expired. This exercise assumes that you have logged on ExoLink's online solution and have the main window displayed.

Exercise H–1: Changing Your Password

#	*Action*	*Result*
1.	In the **User Information** panel, click the **click here** link.	The application displays the **User Information** dialog box.

Exercise H–1: Changing Your Password

#	*Action*	*Result*
2.	Complete the **Change Password** and **Current Password** fields.	Note that password fields are case-sensitive. If you create your new password with all lowercase letters, it must be typed in lowercase. Additionally, passwords must be between 6 and 15 characters long, and contain at least one letter and one number. Passwords cannot be changed to the user ID, current password, or previous password.
3.	Click **Save and Close.**	The application saves your changes and returns to the main window.

The next exercise teaches you to create a customer transaction. Refer to *"Creating and Submitting a New Transaction" on page 3-16* in *Using ExoLink Online* reference document for supporting information. If your company decides to use ExoLink's online solution to create transactions online, you may create only those transactions that have been previously defined for your company and that have been associated with your user ID authority. These approved transactions appear in the **Create Transaction** panel drop-down list. This exercise assumes that you have logged on ExoLink's online solution and have the main window displayed.

Exercise H–2: Creating a Customer Transaction from Scratch

#	*Action*	*Result*
1.	In the **Create Transaction** panel, select the desired transaction from the drop-down list and click **Go**.	The application displays the **Transaction Editor - Create** window.

Exercise H–2: Creating a Customer Transaction from Scratch

#	Action	Result
2.	Complete the required fields.	Required fields, which appear in bold text, are required for the transaction type and your market.
3.	Click **Submit.**	The application processes your transaction.

The next exercise teaches you to perform a search for a specific ESI-ID. Refer to *"Searching for Accounts and Events" on page 3-6* in *Using ExoLink Online* reference document for supporting information. Use the ID search feature when an account number or ESI-ID is available. This exercise assumes that you have logged on ExoLink's online solution and have the main window displayed.

Exercise H–3: Searching for an ESI-ID

#	Action	Result
1.	In the **Search** panel, enter the ESI-ID number in the **ID Search** field and click **Go**.	The application performs the search and displays the **Search Results** window. Note that you can create and submit a transaction from this window.
2.	Close the **Search Results** window.	The application returns you to the main window.

The next exercise teaches you to perform a search for a specific customer name. Refer to *"Searching for Accounts and Events" on page 3-6* in *Using ExoLink Online* reference document for supporting information. Use the customer name (Individual or Business) search feature when an ESI-ID is not available. This exercise assumes that you have logged on ExoLink's online solution and have the main window displayed.

Exercise H–4: Searching for a Customer Name

#	*Action*	*Result*
1.	In the **Search** panel, select the customer type (**Individual** or **Business**) from the drop-down list.	The application displays the selected customer type.
2.	Enter the customer name in the field next to the customer type.	Avoid using a middle initial, as the application interprets the entry as the beginning of the last name. You can view how the application interprets your search criteria by reviewing the information displayed at the bottom of the **Search** panel, which appears as you enter your search criteria.
3.	Click **Go**.	The application performs the search and displays the **Search Results** window.
4.	View the **Search Results** window as needed and close.	The application returns you to the main window.

The next exercise teaches you to perform a search for a premise. Refer to *"Searching for Accounts and Events" on page 3-6* in *Using ExoLink Online* reference document for supporting information. Use the Address search feature when an ESI-ID is not available. This exercise assumes that you have logged on ExoLink's online solution and have the main window displayed.

Exercise H–5: Searching for a Premise

#	Action	Result
1.	In the **Search** panel, enter data in the **Street Name** and **City** fields, and click **Go**.	When performing an address search, street name and city or zip are required. The application performs the search and displays the **Search Results** window.
2.	Close the **Search Results** window.	The application returns you to the main window.

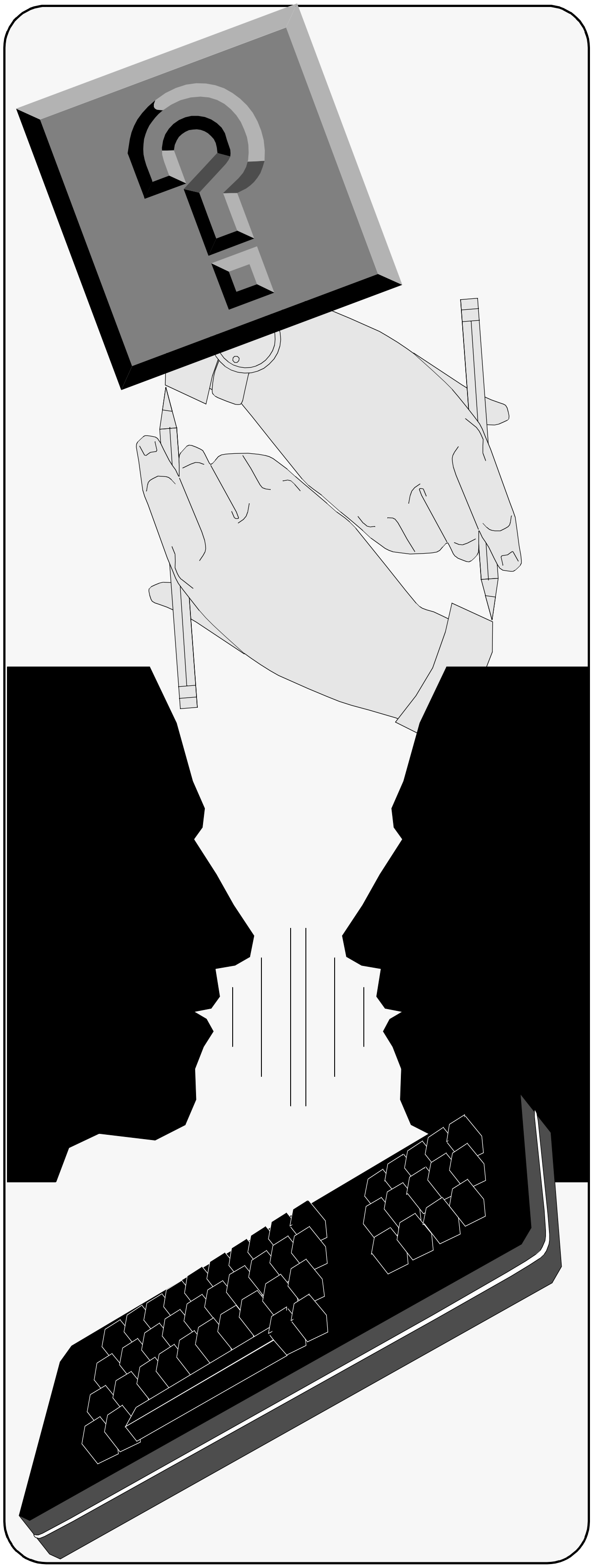
The next exercise teaches you to access and review the **Event Summary** window, which allows you to view a transaction as it appears within the related business event. This exercise assumes that you have logged on ExoLink's online solution and have the main window displayed.

Exercise H–6: Reviewing the Event Summary Window

#	Action	Result
1.	Open any **Receiver Rejects** transaction within the **Action Items** panel.	The application displays the **A - Transaction Editor - Correct** window. Note the Event Summary button in the top tool bar.
2.	Click **Event Summary**.	The application displays the **Event Summary** window.
3.	Click any trading partner or transaction within the **Transaction Details** display area.	The application displays the **Transaction Editor - View** window.
4.	Click **Event Summary**.	The application returns you to the **Event Summary** window. Note that the **Transaction Editor - View** window does not close.

Exercise H–6: Reviewing the Event Summary Window

#	*Action*	*Result*
5.	Click any transaction within the **Transaction Flow** display area.	The application displays the **Transaction Editor - View** window again, the only difference being the details associated with each transaction.
6.	Close the **Transaction Editor - View** window.	The application returns you to the **Event Summary** window.
7.	Close the **Event Summary** window.	The application returns you to the main window.



Chapter 3

Notifications

Objectives

This chapter is designed to walk you through the various options available when working with Notifications. The following topics are discussed:

- *Reviewing a Notification at a Later Date*
- *Reviewing and Submitting a Notification through a Source System*

A. General Information

Notifications are those transactions that provide you with a notification of information such as a scheduled date, the start of service, or the completion of an event. Notifications appear in the **Action Items** panel under the Notifications heading so that you may open and review information, perform any internal process as defined by your company, and *Acknowledge* the transaction to remove it from the **Action Items** panel. The transactions displayed are defined by your company for the current market as well as by the authority assigned within the security profile. The level of detail displayed for any transaction also is defined by your company and security profile for the current market.

To accomplish the defined objectives from the previous page, complete the following exercises:

- *Reviewing a Notification at a Later Date*
- *Reviewing and Submitting a Notification through a Source System*

This first exercise teaches you how to review a Notification transaction using ExoLink's online solution; however, in this scenario, something occurs and you decide to complete your review at a later date.

This exercise assumes that you have logged on ExoLink's online solution and have the main window displayed.

Exercise A–1: Reviewing a Notification at a Later Date

#	*Action*	*Result*
1.	In the **Action Items** panel, click the plus sign (+) preceding **Notifications**.	The application expands the tree structure.
2.	Navigate through the tree structure until you locate the transaction alias with which you want to work.	
3.	Click the alias name.	The application displays the **A - Transaction Editor - Review** window, which allows you to view the transaction data. The level of detail displayed for any transaction is defined by the client for the current market.
4.	You decide that it is too close to lunch to address the issues in this Notification, so you decide to review at a later date and close the window.	The application returns to the main window. Note that the alias with which you were working may not appear in the **Action Items** panel. If this occurs, refresh your screen.

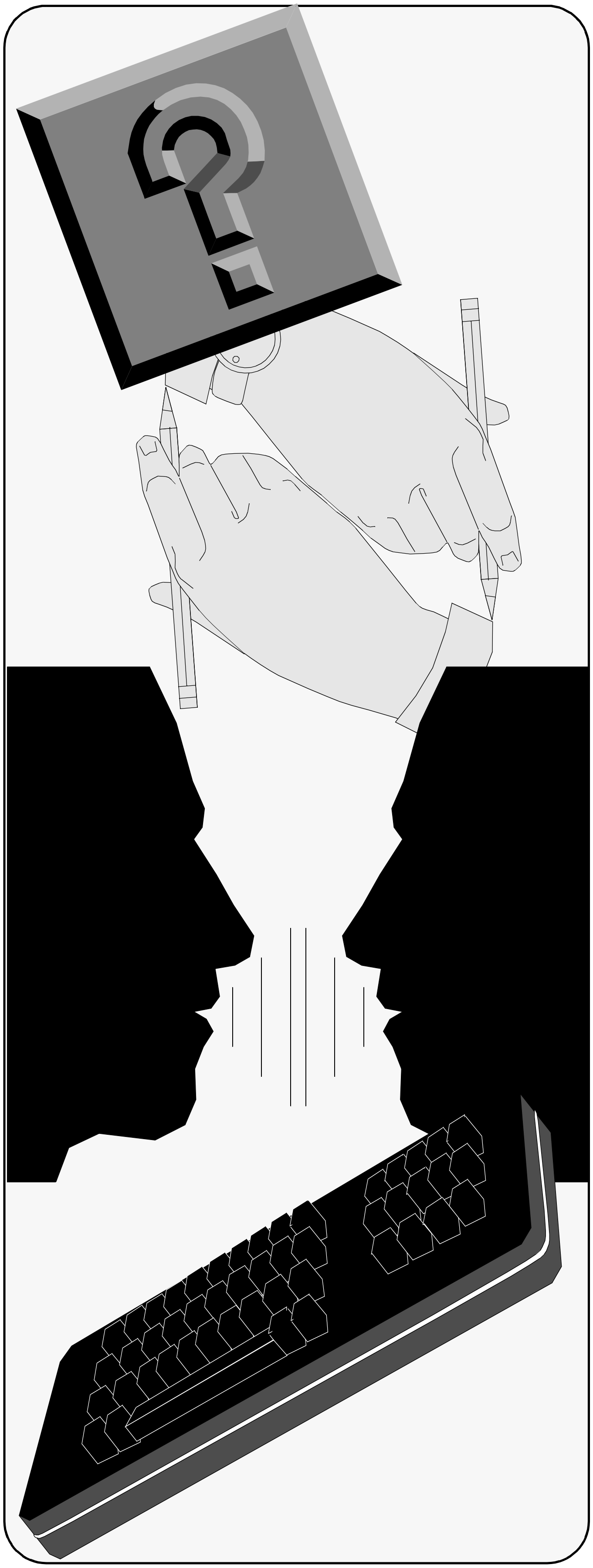
The next exercise teaches you how to review the same Notification transaction as viewed in the previous exercise; however, in this scenario, you submit the updated transaction through a source system. In this manner, ExoLink's online solution is not handling the transaction, you are making the updates in your source system using your internal processes.

This exercise assumes that you have logged on ExoLink's online solution and have the main window displayed.

Exercise A–2: Reviewing and Submitting a Notification through a Source System

#	***Action***	***Result***
1.	Access the transaction alias you just closed.	The application displays the **A - Transaction Editor - Review** window, which allows you to view the transaction data. The level of detail displayed for any transaction is defined by the client for the current market.
2.	Perform any internal processes to correct the information in the source system.	
3.	Click **Acknowledge**.	The application removes the transaction from the **Action Items** panel.

Note: Once **Acknowledge** has been clicked, the transaction will no longer appear within the **Action Items** panel.



C h a p t e r 4

Receiver Rejects

Objectives

This chapter is designed to walk you through the various options available when working with Receiver Rejects. The following topics are discussed:

- *Completing Receiver Rejects at a Later Date*
- *Completing and Submitting a Transaction Online*
- *Completing and Submitting a Transaction through a Source System*

A. General Information

A Receiver Reject is a transaction that the intended recipient has rejected. These transactions typically require existing data changes or additional data prior to being re-submitted. Keep in mind that there are times when a reject will indicate that a transaction cannot be corrected and must simply be acknowledged. For this reason, opening any Receiver Reject transaction provides the following options:

- **Event Summary**: Allows you to view the related event.
- **Acknowledge**: Allows you to acknowledge receipt of the transaction. This option is provided in case the error is outside your scope of control, or if you need to fix the error off-line and resubmit in batch.
- **Correct**: Allows you to copy the existing information, correct the error, and resubmit the transaction. The successful submission of a **Correct** action removes the Receiver Reject transaction from the **Action Items** panel.
- **Create Copy**: Allows you to copy the existing information for purposes other than fixing the error; this option is provided merely as a convenience. This feature will not remove the Receiver Reject transaction from the **Action Items** panel. The Receiver Reject transaction must still be acknowledged.

You must know your market participants well enough to understand the rejection reasons and know whether the transaction can be corrected. Additional information concerning reject reasons can be obtained from the appropriate UDC.

Additionally, some organizations choose not to use ExoLink's online solution to process Receiver Reject transactions; instead, they choose to receive the transactions through a pre-arranged batch process.

If Receiver Reject transactions appear in the **Action Items** panel, they must be handled online; if they do not appear in the **Action Items** panel, these transactions are processed in batch.

To accomplish the defined objectives, complete the following exercises:

- *Completing Receiver Rejects at a Later Date*
- *Completing and Submitting a Transaction Online*
- *Completing and Submitting a Transaction through a Source System*

The first exercise teaches you to complete a Receiver Reject transaction using ExoLink's online solution; however, in this scenario, something occurs and you decide to complete at a later date. This exercise assumes that you have logged on ExoLink's online solution and have the main window displayed.

Exercise A–1: Completing Receiver Rejects at a Later Date

#	*Action*	*Result*
1.	In the **Action Items** panel, click the plus sign (+) preceding **Receiver Rejects**.	The application expands the tree structure.
2.	Navigate through the tree structure until you locate the transaction alias with which you want to work.	The application displays the **A - Transaction Editor - Complete** window, which allows you to view the transaction data. The level of detail displayed for any transaction is defined by the client for the current market.
3.	Perform any internal processes to correct the information in the source system.	Failure to update the source system and then process the transaction within ExoLink's online solution may allow the two systems to become out of synchronization. Updating the source system and then processing the Receiver Reject with the same information will keep these two systems synchronized.

Exercise A–1: Completing Receiver Rejects at a Later Date

#	*Action*	*Result*
4.	Click **Correct**.	The application creates a copy of the original transaction and displays the **Transaction Editor - New** window, along with the reject reason. The level of detail displayed for any transaction is defined by the client for the current market.
5.	You begin to make corrections to the required fields but decide to complete at a later date due to a co-worker's baby shower.	Required fields are identified by bold text. The application will not allow the transaction to be submitted until all errors are corrected and all required fields are completed.
6.	Close the window.	The application returns to the main window, removing any corrected, updated, or newly entered data. Note that the alias with which you were working may not appear in the **Action Items** panel. If this occurs, refresh your screen.

The next exercise teaches you how to process a Receiver Reject transaction, which includes opening the transaction using ExoLink's online solution, clicking **Correct** to create a copy of the original transaction that includes the reject reasons, and clicking **Resubmit** to send the corrections to the originally identified recipient.

This exercise assumes that you have logged on ExoLink's online solution and have the main window displayed.

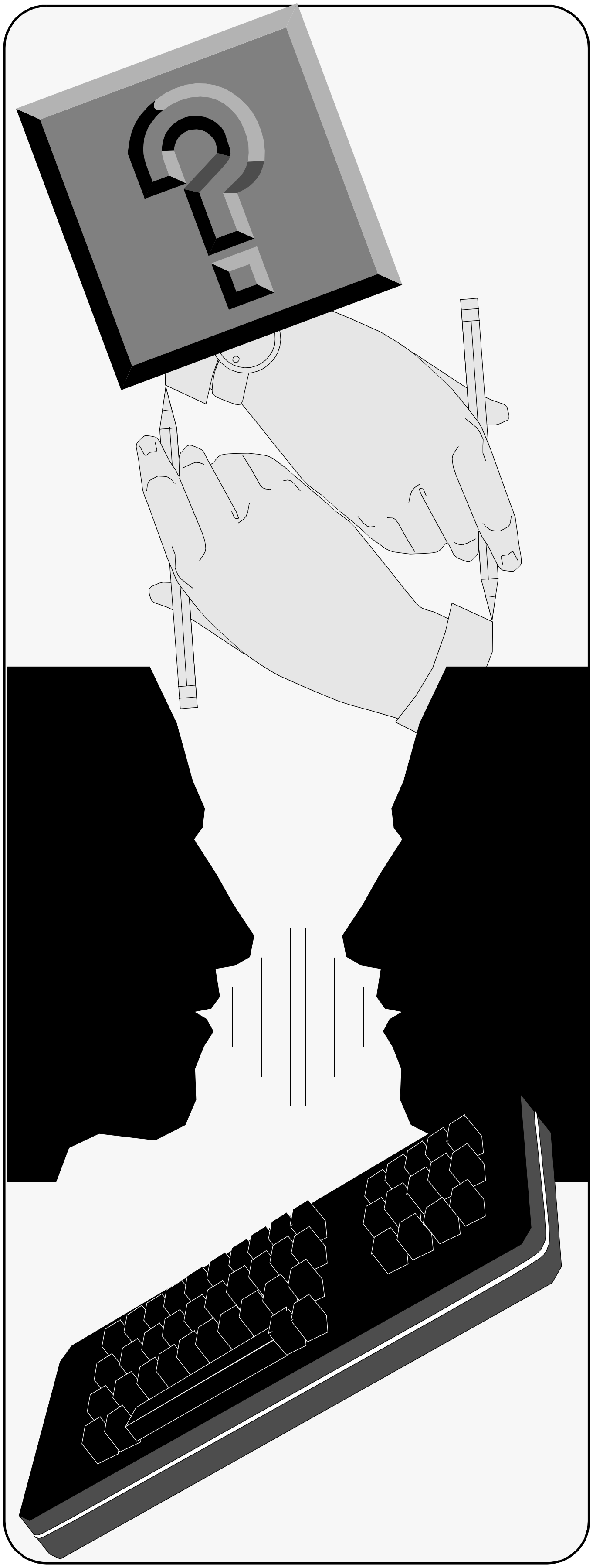
Exercise A–2: Completing and Submitting a Transaction Online

#	*Action*	*Result*
1.	Access the transaction alias you just closed.	The application displays the **A - Transaction Editor - Complete** window, which allows you to view the transaction data. The level of detail displayed for any transaction is defined by the client for the current market.
2.	Perform any internal processes to correct the information in the source system.	Failure to update the source system and then process the transaction online may allow the source system and ExoLink's online solution to become out of synchronization. Updating the source system and then processing the Receiver Reject transaction with the same information will keep the two systems synchronized.
3.	Click **Correct**.	The application creates a copy of the original transaction and displays the **Transaction Editor - New** window, along with the reject reason. The level of detail displayed for any transaction is defined by the client and security profile for the current market.
4.	Complete all required fields as indicated by the help message and links.	Required fields are identified by bold text. ExoLink will not allow the transaction to be submitted until all errors are corrected and all required fields are completed.
5.	Click **Resubmit**.	The application processes your newly corrected transaction and submits it to the originally intended recipient. The application removes the rejected transaction from the **Action Items** panel.

The next exercise teaches you how to review a Receiver Reject transaction using ExoLink's online solution, but submit the updated transaction through a source system. This exercise assumes that you have logged on ExoLink's online solution and have the main window displayed.

Exercise A–3: Completing and Submitting a Transaction through a Source System

#	*Action*	*Result*
1.	Access another transaction alias.	The application displays the **A - Transaction Editor - Complete** window, which allows you to view the transaction data. The level of detail displayed for any transaction is defined by the client for the current market.
2.	Perform any internal processes to correct the information in the source system.	Failure to update the source system and then acknowledge the transaction (to remove the transaction from the **Action Items** panel) may allow the two systems to become out of synchronization. Updating the source system and then processing the Receiver Reject transaction with the same information will keep these two systems synchronized.
3.	Click **Acknowledge** in the original rejected transaction.	The application removes the rejected transaction from the **Action Items** panel.



Chapter 5

Validation Exceptions

Objectives

This chapter is designed to walk you through the various options available when working with Validation Exceptions. The following topics are discussed:

- *Completing Validation Exceptions at a Later Date*
- *Completing and Submitting a Transaction Online*
- *Completing and Submitting a Transaction through a Source System*

A. Understanding Validation Exceptions

Validation Exceptions are those transactions that have failed your company's internal processing rules; sending company rules are applied to transactions as they are sent. These transactions have been submitted within their respect files, have failed validation against an established set of rules, and are returned for correction within ExoLink's online solution.

Opening any Validation Exceptions transaction provides the following options:

- **Event Summary**: Allows you to view the related event.
- **Correct**: Allows you to correct the error and submit (**Correct**) to the original recipient. The successful submission removes the Validation Exception from the **Action Items** panel.
- **Acknowledge**: Allows you to acknowledge receipt of the transaction. This option is provided in case the error is outside your scope of control, or if you need to fix the error offline and resubmit in batch.
- **Create Copy**: Allows you to copy the existing information for purposes other than fixing the error; this option is provided merely as a convenience. This feature will not remove the Validation Exception from the **Action Items** panel.

Some organizations choose not to use ExoLink's online solution to process Validation Exceptions transactions; instead, they choose to receive the transactions through a pre-arranged batch process.

To accomplish the defined objectives, complete the following exercises:

- *Completing Validation Exceptions at a Later Date*
- *Completing and Submitting a Transaction Online*
- *Completing and Submitting a Transaction through a Source System*

The first exercise teaches you to complete a Validation Exceptions transaction using ExoLink's online solution; however, in this scenario, something occurs and you decide to complete at a later date. This exercise assumes that you have logged on ExoLink's online solution and have the main window displayed.

Exercise A–1: Completing Validation Exceptions at a Later Date

#	*Action*	*Result*
1.	In the **Action Items** panel, click the plus sign (+) preceding **Validation Exceptions**.	The application expands the tree structure.
2.	Navigate through the tree structure until you locate the transaction alias with which you want to work.	
3.	Click the alias name.	The application displays the **A - Transaction Editor - Complete** window, which provides a help message to assist you with resolving the exception. The level of detail displayed for any transaction is defined by the client for the current market.

Exercise A–1: Completing Validation Exceptions at a Later Date

#	*Action*	*Result*
4.	Perform any internal processes to correct the information in your source system.	Failure to update the source system and then process the transaction within ExoLink's online solution may allow the two systems to become out of synchronization. Updating the source system and then processing the Validation Exceptions with the same information will keep these two systems synchronized.
5.	You begin to make corrections to the required fields but decide to complete at a later date due to a lunch date.	Required fields are identified by bold text. The application will not allow the transaction to be submitted until all errors are corrected and all required fields are completed.
6.	Close the window.	The application returns to the main window, removing all corrected, updated, or newly entered data. Note that the alias with which you were working may not appear in the **Action Items** panel. If this occurs, refresh your screen.

The next exercise teaches you how to process a Validation Exceptions transaction online. This exercise assumes that you have logged on ExoLink's online solution and have the main window displayed.

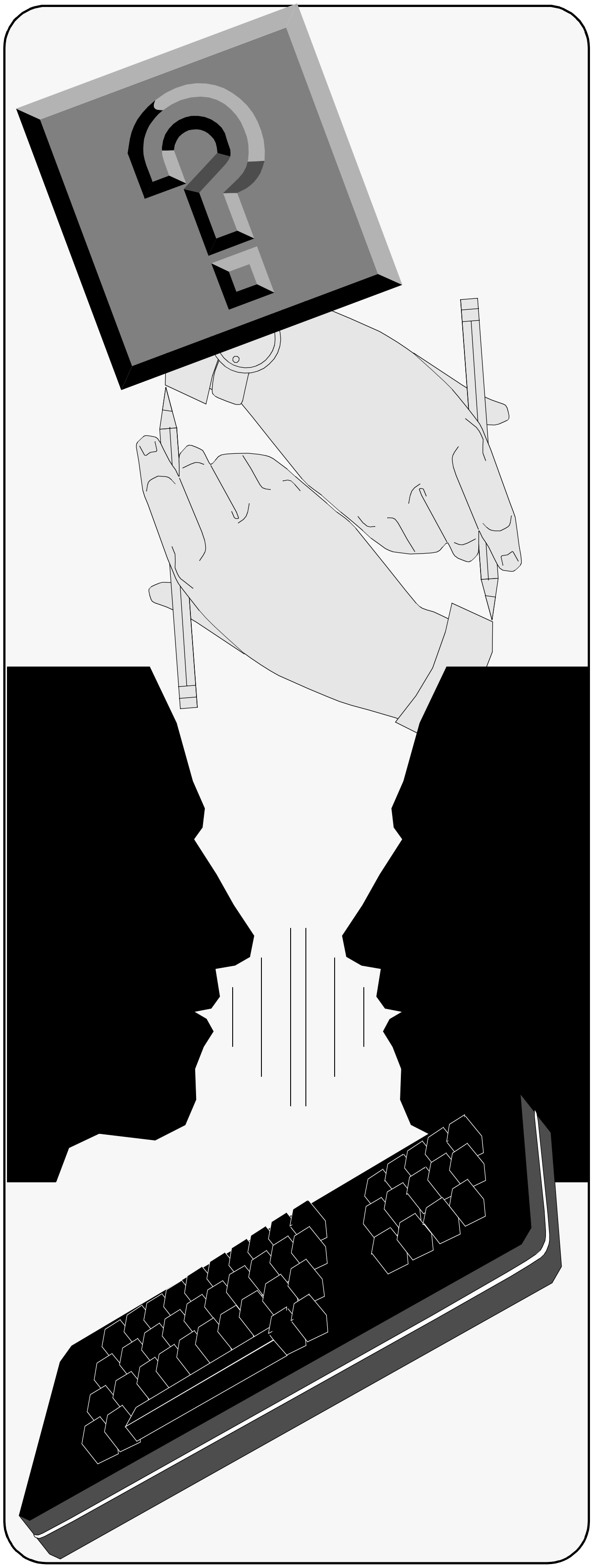
Exercise A–2: Completing and Submitting a Transaction Online

#	***Action***	***Result***
1.	Access the transaction alias you just closed.	The application displays the **A - Transaction Editor - Complete** window, which provides a help message to assist you with resolving the exception. The level of detail displayed for any transaction is defined by the client for the current market.
2.	Perform any internal processes to correct the information in your source system.	Failure to update your source system and then process the transaction online may allow the two systems to become out of synchronization. Updating the source system and then processing the Validation Exceptions with the same information will keep these two systems synchronized.
3.	Complete all required fields as indicated by the help message and links.	Required fields are identified by bold text. The application will not allow the transaction to be submitted until all errors are corrected and all required fields are completed.
4.	Click **Correct**.	The application processes your changes and submits the transaction to the originally intended recipient. Additionally, the application removes the transaction from the **Action Items** panel.

The next exercise teaches you how to review a Validation Exceptions transaction online; however, in this scenario, you submit the updated transaction through a source system. This exercise assumes that you have logged on ExoLink's online solution and have the main window displayed.

Exercise A–3: Completing and Submitting a Transaction through a Source System

#	*Action*	*Result*
1.	Access another transaction alias.	The application displays the **A - Transaction Editor - Complete** window, which provides a help message to assist you with resolving the exception. The level of detail displayed for any transaction is defined by the client for the current market.
2.	Perform any internal processes to correct the information in your source system.	Failure to update your source system and then acknowledge the transaction online may allow the two systems to become out of synchronization. Updating the source system and then processing the Validation Exception with the same information will keep these two systems synchronized.
3.	Click **Acknowledge**.	The application removes the transaction from the **Action Items** panel.



Chapter 6

Required Manual Completions

Objectives

This chapter is designed to walk you through the various options available to you when working with Required Manual Completions. The following topics are discussed:

- *Completing a Transaction at a Later Date*
- *Completing and Submitting a Transaction Online*

A. General Information

Required Manual Completions transactions are those transactions that require additional information that could not be derived or pulled from an existing data source prior to being sent to a previously identified recipient. Opening any Required Manual Completions transaction provides the following options:

- **Event Summary**: Allows you to view the transaction within the related event.
- **Submit**: Allows you to enter and submit the required information. The successful submission removes the Required Manual Completions transaction from the **Action Items** panel.

The purpose of a Required Manual Completions transaction is to allow an end-user to use ExoLink's online solution to finish a transaction.

Some organizations choose not to use ExoLink's online solution to process these Required Manual Completions transactions; instead, they choose to receive the transactions through a pre-arranged batch process. If this choice is made, no Required Manual Completions will display in the **Action Items** panel.

To accomplish the defined objectives from the previous page, complete the following exercises:

- *Completing a Transaction at a Later Date*
- *Completing and Submitting a Transaction Online*

The first exercise teaches you how to complete a Required Manual Completions transaction using ExoLink's online solution; however, in this scenario, something occurs and you decide to complete at a later date.

This example assumes that you have logged on ExoLink's online solution and have the main window displayed.

Exercise A–1: Completing a Transaction at a Later Date

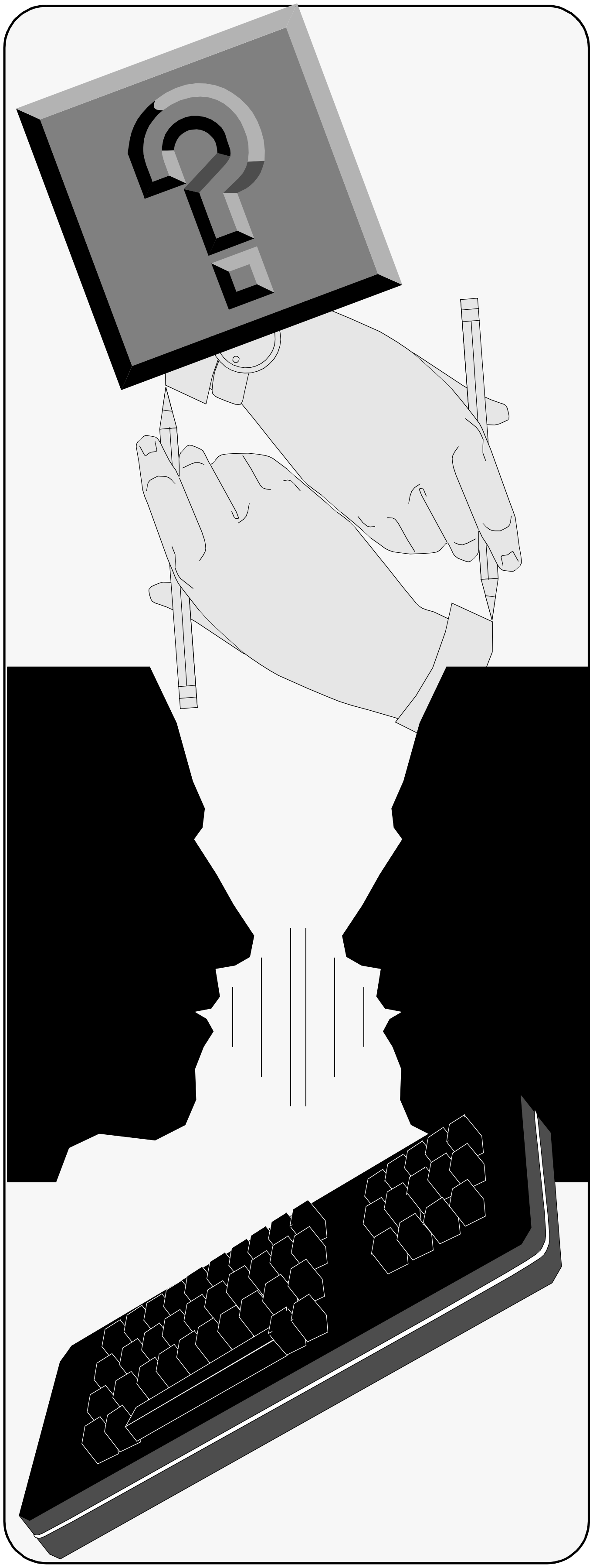
#	Action	Result
1.	In the **Action Items** panel, click the plus sign (+) preceding **Required Manual Completions**.	The application expands the tree structure.
2.	Navigate through the tree structure until you locate the transaction alias with which you want to work.	
3.	Click the alias name.	The application displays the **A - Transaction Editor - Complete** window. The level of detail displayed for any transaction is defined by the client for the current market.
4.	You begin making corrections to the required fields but decide to complete at a later date due to an important call.	Required fields are identified by bold text. The application will not allow the transaction to be submitted until all errors are corrected and all required fields are completed.
5.	Close the window.	The application returns to the main window, removing all corrected, updated, or newly entered data. Note that the alias with which you were working may not appear in the **Action Items** panel. If this occurs, refresh your screen.

The next exercise teaches you how to process a Required Manual Completions transaction using ExoLink's online solution.

This exercise assumes that you have logged on ExoLink's online solution and have the main window displayed.

Exercise A–2: Completing and Submitting a Transaction Online

#	*Action*	*Result*
1.	Access the transaction alias you just closed.	The application displays the **A - Transaction Editor - Complete** window. The level of detail displayed for any transaction is defined by the client for the current market.
2.	Complete all required fields.	Required fields are identified by bold text. Note that the transaction can be submitted only to the originally designated recipient; a new recipient cannot be selected.
3.	Click **Submit**.	The application processes your additions and removes the original transaction from the **Action Items** panel.



Chapter 7

Reports

Objectives

This chapter is designed to walk you through the various options available when working with ExoLink's online Report feature. The following topics are discussed:

- *Reviewing the Reports Feature*
- *Generating a Report*
- *Reviewing Report Options*

A. General Information

Reports provide you with information in regard to specific collections of information. Questions such as were there any processing errors, how many, and what kind are typically answered with a specific report. While we are not covering specific reports in this section, we are presenting the different tasks you may perform when accessing the Reports feature, which provides the ability for a quick snapshot of file tracking, transaction status, and data analysis by customer or file.

To accomplish the defined objectives from the previous page, complete the following exercises:

- *Reviewing the Reports Feature*
- *Generating a Report*
- *Reviewing Report Options*

The first exercise assumes that you have logged on ExoLink's online solution and have the main window displayed.

Exercise A–1: Reviewing the Reports Feature

#	***Action***	***Result***
1.	In the **Administration** panel, click the **view reports** link.	The application displays the **Reports** window. Note that the window consists of two areas: **Available Reports** and **Report Input Information**.
2.	Review the list of available reports in the **Available Reports** display area.	Note that the **Report Input Information** work area is blank.

Exercise A–1: Reviewing the Reports Feature

#	Action	Result
3.	Click any report listed in the **Available Reports** display area.	Note that the **Report Input Information** work area may display a set of fields to be completed and an action button (typically **Run**). This work area may display different fields and buttons based on the report selected in the **Available Reports** display area.

The next exercise assumes that you have logged on ExoLink's online solution and have the **Reports** window displayed. This scenario describes your generating a standard report.

Exercise A–2: Generating a Report

#	Action	Result
1.	In the **Available Reports** display area, click the **FIle Statistics** report.	The application displays two fields to be completed in the **Report Input Information** work area. The required information consists of a date range.
2.	Click the display area following the **Files registered between** field tag.	The application displays a calender for you to specify the beginning date range.
3.	Select November 1, 2001 as the beginning date.	The application returns you to the **Reports** window.
4.	Click the display area following the **and** field tag.	The application displays a calender for you to specify the ending date range.
5.	Select November 7, 2001 as the ending date.	The application returns you to the **Reports** window.

Exercise A–2: Generating a Report

#	*Action*	*Result*
6.	Click **Run**.	The application processes the request and displays the **Running report...** dialog box until the process completes, at which time the **Report Results** window displays the pre-set fields for the selected report.

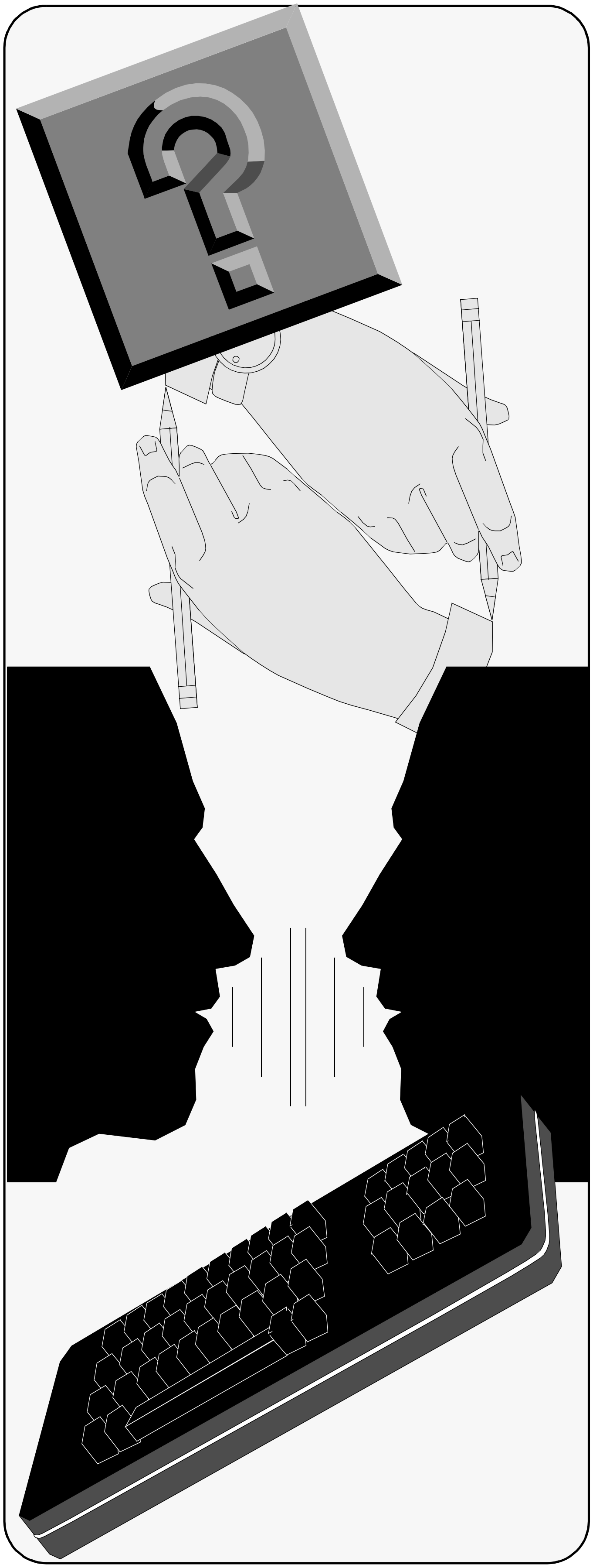
The next exercise assumes that you have logged on ExoLink's online solution and have generated the File Statistics report, with the **Report Results** window displayed.

Exercise A–3: Reviewing Report Options

#	*Action*	*Result*
1.	Click **Export** to review the Export functionality.	The application displays the **Export Report** window, prompting you to specify the path where you want the file saved. Note that the default file type is HTML.
2.	Click the drop-down arrow to the right of **Files of Type**.	Note that the file also can be exported as All Files (*.*) or Comma Separated Values (CVS).
3.	Click **Cancel** as you have decided not to export the file.	The application returns you to the **Report Results** window.
4.	Click **Print** to review the Print window.	The application displays the **Print** window, prompting you to specify where you want the file to print. Note that this functionality matches all other windows print features.
5.	Click **Cancel** as you remember your printer is not working.	The application returns you to the **Report Results** window.

Exercise A–3: Reviewing Report Options

#	Action	Result
6.	Click one of the underlined files in the **Report Results** display area to review the **Related Files** functionality.	The application processes the request and displays the **Related Files** dialog box until the process completes, at which time the **Related Files** window displays, providing a graphical representation of the sequence in which the related files were processed. Note that this view of the **Related Files** window may display files associated with multiple events if authority is set so as to allow viewing.
7.	Position your cursor over one of the white or blue rectangles containing text.	The application displays a dialog box listing the following information: • **Date Registered**: Indicates the date the file was registered in ExoLink's application. • **Date Processed** or **Date Sent**: Indicates the date the file was processed or sent to and from ExoLink. • **Transactions**: Indicates the number of transactions associated with the data file (i.e., a single data file may contain multiple transactions).
8.	Click **Home**.	The application returns you to the main window. Clicking **Home** on the **Report Results** window also returns you to the main window. Note that in both instances, neither the **Report Results** window nor the **Related Files** window close.



Chapter 8

Administration

Objectives

This chapter is designed to walk you through the various options available to you when working with ExoLink's online Administration feature. The following topics are discussed:

- *Reviewing the Manage Users Window*
- *Creating and Updating a User*
- *Reviewing the Manage Profiles Window*
- *Creating, Updating, and Deleting a Profile*
- *Assigning Permissions and Trading Partners*
- *Associating a User to a Profile*
- *Validating the Association of a Profile*

A. General Information

The **Administration** panel provides you the ability to manage end-user access to the various online functions. For example, an Administrator can add, modify, or delete users (Users); add, modify, or delete work profiles (Profiles); and associate or disassociate users with existing work profiles.

To accomplish the defined objectives from the previous page, complete the following exercises:

- *Reviewing the Manage Users Window*
- *Creating a New User*
- *Reviewing the Manage Profiles Window*
- *Creating a New Profile*
- *Assigning Permissions and Trading Partners*
- *Associating a User to a Profile*
- *Validating the Association of a Profile*

The first exercise familiarizes you with the **Manage Users** window, which allows you to create, update, and delete users. This exercise assumes that you have logged on ExoLink's online solution and have the main window displayed.

Exercise A–1: Reviewing the Manage Users Window

#	*Action*	*Result*
1.	In the **Administration** panel, click **users**.	The application displays the **Manage Users** window. Note that the window consists of two areas: **User Information** and **Selected User's Profiles**.
2.	Click a user name in the **User Information** display area.	Note that the **Selected User's Profiles** work area displays a set of **Associated** and **Available** profiles.

Exercise A–1: Reviewing the Manage Users Window

#	*Action*	*Result*
3.	Click another user name in the **User Information** display area.	Note that the **Selected User's Profiles** work area displays a different set of **Associated** and **Available** profiles.
4.	Click the **Name** column heading.	The application sorts the **User Information** display area by user name. The arrow to the right indicates whether the sort order is ascending or descending. Clicking the **Name** column heading a second time reverses the sort order. All of the column headings in the **User Information** display area have the same sort functionality.

The next exercise teaches you how to create a new user. This exercise assumes that you have logged on ExoLink's online solution and have the **Manage Users** window displayed.

Exercise A–2: Creating a New User

#	*Action*	*Result*
1.	Click **New User** at the bottom of the **User Information** display area.	The application displays the **New User** dialog box.

Exercise A–2: Creating a New User

#	*Action*	*Result*

2.	Complete the following fields:
	• **Name:**
	  • **(first):** `George`
	  • **(last):** `Jetson`
	• **Logon ID**
	  • `georgej`
	• **Contact:**
	  • **Phone:** `(555) 123-4567`
	  • **Fax:** `(555) 234-5678`
	  • **E-mail:** `George.Jefferson@Astro.com`
		Required fields include both **Name** fields and the **Logon ID**. The remaining fields may be updated by the user at a later date.
		Logon ID and password default standards are as follows:
		• Logon ID—first name last initial (no spaces)
		• Password—first initial last name (no spaces)
		Note that the e-mail address is incorrect; you will correct this in the next exercise.

3.	Click **Save and Close**.	The application returns you to the **Manage Users** window, with the new user name highlighted.

The next teaches you how to update an existing user's e-mail address. This exercise assumes that you have logged on ExoLink's online solution and have the **Manage Users** window displayed.

Exercise A–3: Updating an Existing User's Information

#	*Action*	*Result*
1.	Select **George Jetson** in the **User Information** display area and click **Update User**.	The application displays the **Update User** dialog box.

2.	Change the e-mail address from:
	`George.Jefferson@Astro.com`
	to:
	`George.Jetson@Astro.com`	

Exercise A–3: Updating an Existing User’s Information

#	Action	Result
3.	Click **Save and Close**.	The application returns you to the **Manage Users** window, with the new user name highlighted.

You could associate an available work profile with the newly created user at this time; however, we are going to create a new profile for this user. The following exercises walk you through creating a profile and assigning permissions.

The next exercise familiarizes you with the **Manage Profiles** window, which allows you to create, update, and delete work profiles. This exercise assumes that you have logged on ExoLink’s online solution and have the main window displayed.

Exercise A–4: Reviewing the Manage Profiles Window

#	Action	Result
1.	In the **Administration** panel, click **profiles**.	The application displays the **Manage Profiles** window. Note that the window consists of two areas: **Profile Information** and **Permissions/Users**.
2.	Click **General** in the **Profile Information** display area.	The **General** profile has been set up to provide the user access to view, and acknowledge errors and notifications for all transactions. Additionally, the user has access to view active events. Note that the **Permissions/Users** work area displays a set of **Permissions**.

Exercise A–4: Reviewing the Manage Profiles Window

#	*Action*	*Result*
3.	Click **View** in the **Profile Information** display area.	The **View** profile has been set up to provide the user access to view all transactions. Additionally, the user has access to view active events. Note that the **Permissions/Users** work area displays a set of **Permissions**.
4.	Click another profile in the **Profile Information** display area.	Note that the **Permissions/Users** work area displays a different set of **Permissions**.

The **Users** tab displayed in the **Permissions/Users** work area does not allow you to create, update, or delete a user. You can only associate available users to the selected profile.

The next exercise teaches you how to create a new profile. This exercise assumes that you have logged on ExoLink’s online solution and have the **Manage Profiles** window displayed.

Exercise A–5: Creating a New Profile

#	*Action*	*Result*
1.	Click **New Profile** at the bottom of the **Profile Information** display area.	The application displays the **Create New Profile** dialog box.
2.	Enter `Spacey’s Retail Profile`, and click **OK**.	The application returns you to the **Manage Profiles** window, with the new profile name highlighted. Note that the profile name is incorrect; it should be Spacely’s Retail Profile. You will correct this error in the next exercise.

The next exercise teaches you how to update the name of an existing profile. This exercise assumes that you have logged on

ExoLink's online solution and have the **Manage Profiles** window displayed.

Exercise A–6: Updating an Existing Profile

#	Action	Result
1.	Select **Spacey's Retail Profile** in the **Profile Information** display area.	
2.	Click **Rename Profile**.	The application displays the **Change Profile Name** dialog box.

3.	Change the profile name from:
	`Spacey's Retail Profile`
	to:
	`Spacely's Retail Profile`	

4.	Click **OK**.	The application returns you to the **Manage Profiles** window, with the new user name highlighted.

The next exercise teaches you how to delete an existing profile; however, in this scenario, you decide not to delete the profile. This exercise assumes that you have logged on ExoLink's online solution and have the **Manage Profiles** window displayed.

Exercise A–7: Deleting an Existing Profile

#	Action	Result
1.	Select **Spacely's Retail Profile** in the **Profile Information** display area.	
2.	Click **Delete Profile**.	The application displays the **Confirm Profile Deletion** dialog box.

Exercise A–7: Deleting an Existing Profile

#	*Action*	*Result*
3.	Click **No**, as you have changed your mind and do not want to delete this profile	The application returns you to the **Manage Profiles** window. Had you clicked **Yes**, the application would have returned you to the **Manage Profiles** window, and the profile would no longer be displayed in the **Profile Information** display area.

The **Copy Profile** option, not addressed in this exercise, allows you to copy an existing profile, make a name change, and modify permissions as necessary. This option is useful if you have an existing profile with permissions similar to what you need.

Permissions are the means by which you, the administrator, restrict a user's ability to access application functions. To make use of this feature, you create a work profile, establish the permissions for the profile, and then associate the user to the profile. Because multiple users can be associated with a specific work profile, all the user's associated with the profile have the same access rights to application functions.

The next exercise walks you through assigning permissions and trading partners to the work profile. This exercise assumes that you have logged on ExoLink's online solution and have the

Manage Profiles window displayed, with Spacely's Retail Profile selected.

Exercise A–8: Assigning Permissions and Trading Partners

#	Action	Result
1.	Click **Permissions** and then **Transactions** in the **Permissions/Users** work area.	The application displays the **Transactions** work area, allowing you to specify transaction permissions for this profile.
2.	Click the **All** column check box for the following events: • **Enrollment** • **Termination**	The application populates all the column check boxes for the selected transaction names. These check marks indicate that the user has the permission to perform the action as listed in the column heading as it relates to the transaction.
3.	With **Permissions** still selected, click **Events** in the **Permissions/Users** work area.	The application displays the **Events** work area, allowing you to specify event permissions for this profile.
4.	Click the **All** column check box for the following event names: • **Enrollment** • **Termination**	The application populates all the column check boxes for the selected event names. These check marks indicate that the user has the permission to perform the action as listed in the column heading as it relates to the transaction. Not selecting the view permissions for a specific event will prevent the user from being able to view the **Event Summary** window for an associated transaction.
5.	In the **Trading Partners** column, select **ERCOT** from the drop-down list for the following event names: • **Enrollment** • **Termination**	The application displays ERCOT in the **Trading Partners** column for both Enrollment and Terminations.

Exercise A–8: Assigning Permissions and Trading Partners

#	*Action*	*Result*
6.	With the **Permissions** tab still selected, click the **Reports** tab in the **Permissions/Users** work area.	The application displays the **Reports** work area, allowing you to specify report permissions for this profile.
7.	Click the **All** column check box for the following report names: • **Enrollment Detail** • **File Statistics**	The application populates all the column check boxes for the selected report names. These check marks indicate that the user has the permission to perform the action (column heading) as it relates to the transaction.
8.	With **Permissions** still selected, click **Administration** in the **Permissions/Users** work area.	The application displays the **Administration** work area, allowing you to specify the users level of access to Administration panel functionality (i.e., the ability to create users, profiles, etc.).
9.	Click the **View File Flow** column check box.	This option allows the user to view File Flow diagrams, but limits their administrative capabilities

The next exercise walks you through associating an existing user with an existing work profile. This exercise assumes that you have logged on ExoLink's online solution and have the **Manage Profiles** window displayed, with Spacely's Retail Profile selected.

Exercise A–9: Associating a User to a Profile

#	*Action*	*Result*
1.	Click the **Users** tab in the **Permissions/Users** work area.	The application displays the **Users** work area, allowing you to specify which users to associate with this profile.

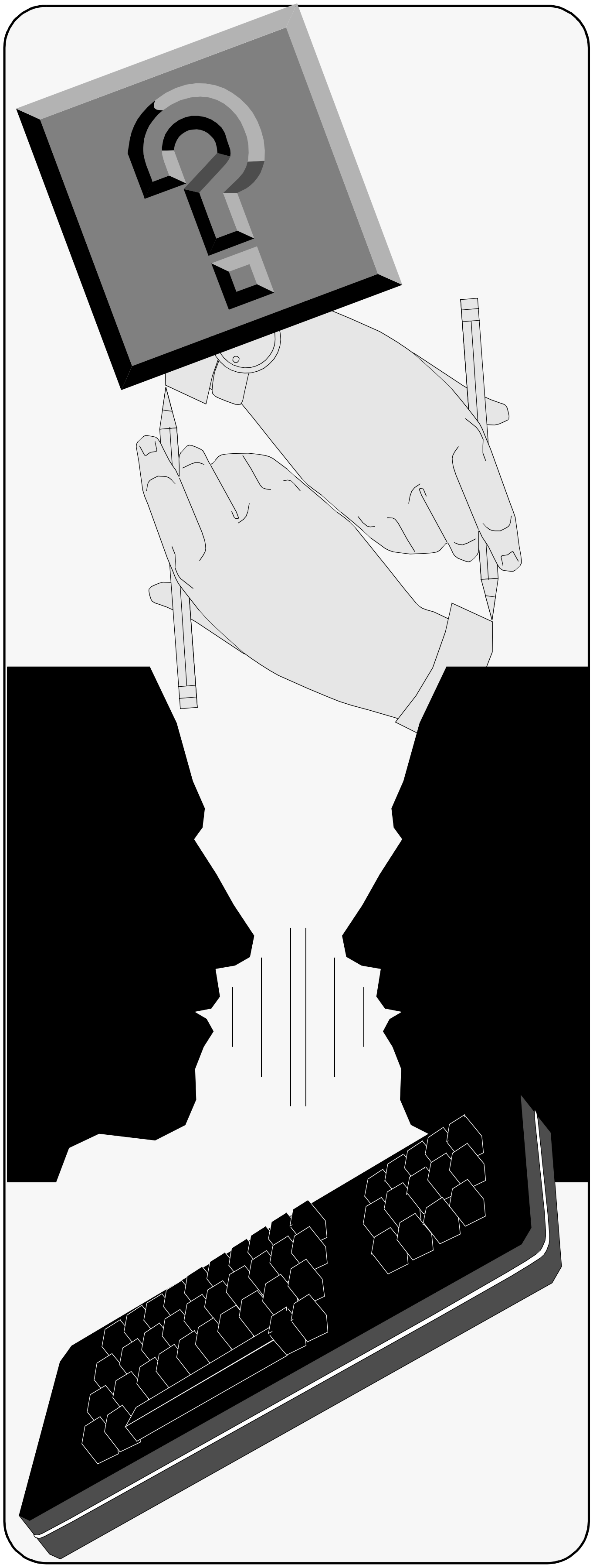
Exercise A–9: Associating a User to a Profile

#	Action	Result
2.	Click **George Jetson** from the **Available** list box and click the **<** button.	The application moves George Jetson from the Available list box to the Associated list box. You can associate as many users to this work profile as necessary.
3.	Click **Save**.	The application displays a Save Complete dialog box, indicating that your changes have been saved.
4.	Click **Home**.	The application returns you to the main window.

The next exercise allows you to validate that the user and profile association has been made. This exercise assumes that you have logged on ExoLink's online solution and have the main window displayed.

Exercise A–10: Validating the Association of a Profile

#	Action	Result
1.	In the **Administration** panel, click the **users** link.	The application displays the **Manage Users** window. Note that the window consists of two areas: **User Information** and **Selected User's Profiles**.
2.	Click **George Jetson** in the **User Information** display area.	The application displays **Spacely's Retail Profile** in the **Associated** list box of the **Selected User's Profiles** work area. Also note the checked box in the **Using Profiles?** column on the **User Information** display area.
3.	Click **Home**.	The application returns you to the main window.



Chapter 9

Forms

Overview

This section contains the following supporting forms for *ExoLink's Online Solution Training Course*:

- *Attendance Sheet*
- *Course Evaluation Form*
- *Instructor Evaluation Form*
- *Training Evaluation Form*
- *Using ExoLink's Online Solution Documentation Evaluation Form*
- *ExoLink's Online Solution Training Guide Document Evaluation Form*

The last three forms listed are to be completed once the student has had the opportunity to further review the material and evaluate its usefulness.

A. Attendance Sheet

Distribute this form for the participants to sign. Be sure to collect the sheet prior to completing the course. Forward the completed attendance sheet to your training department.

This information assists your training department in tracking who has attended ExoLink's Online Solution Training Course.

Attendance Sheet

Course Date: ______________________

Participant Name	**Participant's Organization/Group**
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	
11.	
12.	
13.	
14.	
15.	
16.	
17.	
18.	
19.	
20.	

B. Instructor Evaluation Form

Have the participants complete this form and return it to you prior to their departure on the final day of training. This information, which is intended for the instructor's personal improvement, enables you to determine your effectiveness and identify areas where improvements will enhance your next training session.

If a participant is unable to complete the form before they leave, have them mail the completed form to your training department.

Instructor Evaluation Form

Topic: ExoLink's Online Solution **Instructor Name:** ____________________

Introduction/General Conduct	Excellent				Poor	
1. Introduced self and audience	5	4	3	2	1	N/A
2. Stated course name and objectives	5	4	3	2	1	N/A
3. Faced the audience	5	4	3	2	1	N/A
4. Good voice clarity and volume	5	4	3	2	1	N/A

Class Participation	Excellent				Poor	
5. Asked fair questions	5	4	3	2	1	N/A
6. Repeated questions for class	5	4	3	2	1	N/A
7. Provided appropriate answers	5	4	3	2	1	N/A

Course Direction	Excellent				Poor	
8. Adhered to lesson plan	5	4	3	2	1	N/A
9. Controlled class pace and direction	5	4	3	2	1	N/A
10. Summarized material	5	4	3	2	1	N/A

Use of Course Material	Excellent				Poor	
11. Made effective use of handouts	5	4	3	2	1	N/A
12. Made effective use of other aids	5	4	3	2	1	N/A

C. Course Evaluation Form

Have the participants complete this form and return it to you prior to their departure on the final day of training. This information, which should be forwarded to the department responsible for maintaining the training material, allows for documentation enhancements to improve the effectiveness of the training material.

If a participant is unable to complete the form before they leave, have them mail the completed form to your training department.

Course Evaluation Form

Instructor Name: ____________________ **Subject:** ExoLink's Online Solution

Dates Conducted: ____________________ **Location:** ____________________

Overall Evaluation		Excellent				Poor	
1.	Course met stated objectives	5	4	3	2	1	N/A
2.	Instructor effectiveness	5	4	3	2	1	N/A
3.	Materials	5	4	3	2	1	N/A
Critique of Course		Excellent				Poor	
4.	Applicable to your work	5	4	3	2	1	N/A
5.	Time allocated to the course	5	4	3	2	1	N/A
6.	Amount of material covered	5	4	3	2	1	N/A
7.	Handouts for the course	5	4	3	2	1	N/A
8.	Value of exercises	5	4	3	2	1	N/A
9.	Visual aids	5	4	3	2	1	N/A
Critique of Instructor		Excellent				Poor	
10.	Established objectives	5	4	3	2	1	N/A
11.	Responded to questions and input	5	4	3	2	1	N/A
12.	Used effective examples	5	4	3	2	1	N/A
13.	Presented information clearly	5	4	3	2	1	N/A
14.	Summarized material	5	4	3	2	1	N/A
15.	Taught at class level of understanding	5	4	3	2	1	N/A
General Critique		Excellent				Poor	
16.	Class facilities	5	4	3	2	1	N/A

Suggestions for improvement and general comments:

____

____

____

Signature: ________________________________ (Optional) Phone: _______________

D. *Using ExoLink's Online Solution* Documentation Evaluation Form

Participants should complete this form several weeks after they have completed the training course, once they have had the opportunity to review and evaluate the effectiveness of the document.

Using ExoLink's Online Solution

Documentation Evaluation Form

Please complete the following form. The information you provide will help us determine the effectiveness of the documentation and enable us to make improvements to better meet the needs of our clients.

Thank you for your participation.

Is the documentation accurate?

Are all relevant topics covered?

Is the appropriate information provided for each topic?

Is enough information provided for each topic?

Is too much information provided for each topic?

Is the information provided easy to locate and understand?

Is information located where you expected to find it?

Is the document easy to use?

E. Training Evaluation Form

Participants should complete this form several weeks after they have completed the training course. This information enables your training department to determine whether the training impacts the actual use of ExoLink's online solution while on the job.

Training Evaluation Form

Please complete the following form. The information you provide will help us determine the effectiveness of the training course and enable us to make improvements to better meet the needs of future trainees.

Thank you for your participation.

Name: ______________________________ Date: ___________________________

Work site (city, state, etc.): ____

Job Title: ____

Briefly describe your duties: ____

____

____

Where were you trained? (site): _________________________________

What dates? ____

What did you learn in training that you've found to be the MOST helpful? ___________

____

____

What did you learn that you've found to be the LEAST useful? _____________________

____

____

How often do you use ExoLink's online solution? daily weekly monthly rarely

What functions do you use? _______________________________________

____

Explain how their use relates to your job. _______________________________________

____

Signature: _________________________________ (optional) Phone: ____________________

F. *ExoLink's Online Solution Training Guide* Document Evaluation Form

Participants should complete this form several weeks after they have completed the training course, once they have had the opportunity to review and evaluate the effectiveness of the document.

ExoLink's Online Solutuion Training Guide

Documentation Evaluation Form

Please complete the following form. The information you provide will help us determine the effectiveness of the documentation and enable us to make improvements to better meet the needs of our clients.

Thank you for your participation.

Is the training guide accurate?

Are all relevant topics covered?

Is the appropriate information provided for each topic?

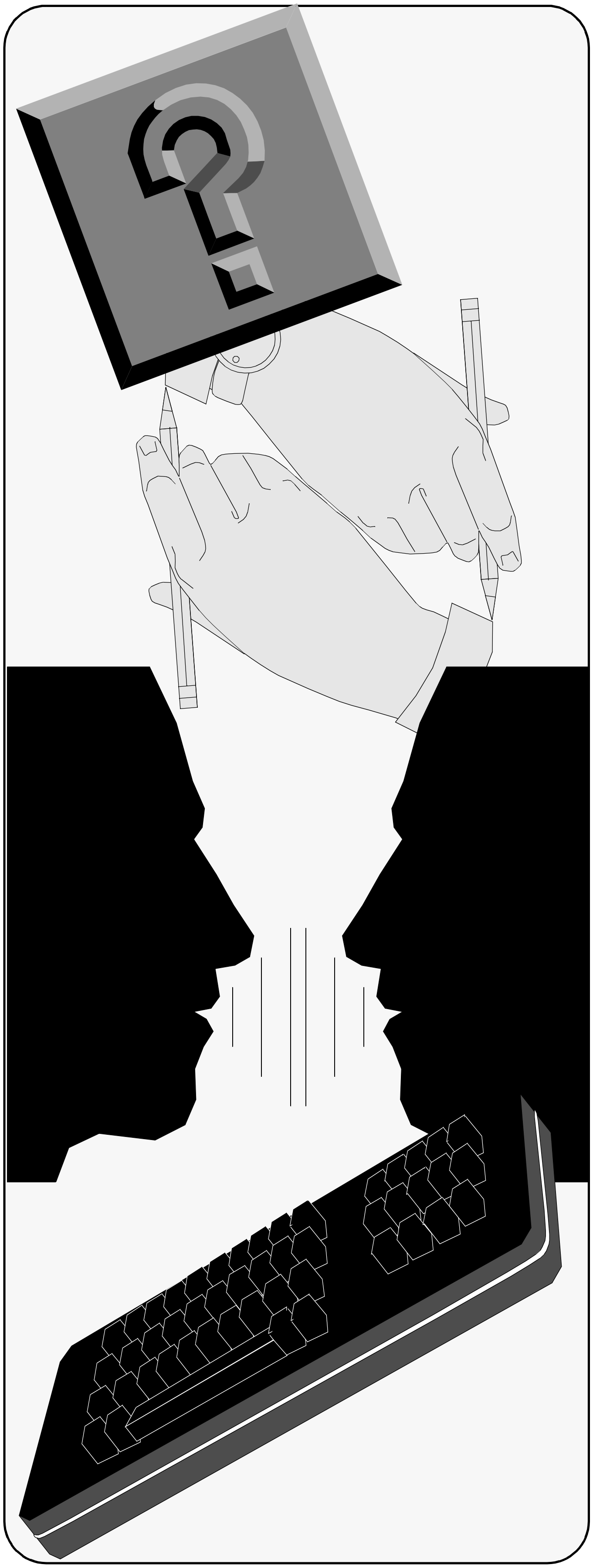
Is enough information provided for each topic?

Is too much information provided for each topic?

Is the information provided easy to locate and understand?

Is information located where you expected to find it?

Is the document easy to use?



Chapter 10

Evaluations

Overview

This section contains the evaluation forms for *ExoLink's Online Solution Training Course:*

- *Instructor Evaluation Form*
- *Course Evaluation Form*

Please complete and return.

The instructor should distribute an Attendance Sheet for the participants to sign. If this has not been done, kindly remind the instructor to do so. The instructor should collect the sheet prior to releasing the students each day.

A. Instructor Evaluation Form

Please complete this form and return it to your instructor prior to departure on the final day of training. This information, which is intended for the instructor’s personal improvement, enables the instructor to determine effectiveness and identify areas where improvements may enhance your next training session.

If unable to complete the form before you leave, mail the completed form to the ExoLink training department. The mailing address is provided at the bottom of this form.

B. Course Evaluation Form

Please complete this form and return it to your instructor prior to departure on the final day of training. This information, which is forwarded to the department responsible for maintaining the training material, allows for documentation enhancements to improve the effectiveness of the training material.

If unable to complete the form before you leave, mail the completed form to the ExoLink training department. The mailing address is provided at the bottom of this form.

Instructor Evaluation Form

Topic: ExoLink's Online Solution **Instructor Name:** ____________________

Introduction/General Conduct		Excellent				Poor	
1.	Introduced self and audience	5	4	3	2	1	N/A
2.	Stated course name and objectives	5	4	3	2	1	N/A
3.	Faced the audience	5	4	3	2	1	N/A
4.	Good voice clarity and volume	5	4	3	2	1	N/A

Class Participation		Excellent				Poor	
5.	Asked fair questions	5	4	3	2	1	N/A
6.	Repeated questions for class	5	4	3	2	1	N/A
7.	Provided appropriate answers	5	4	3	2	1	N/A

Course Direction		Excellent				Poor	
8.	Adhered to lesson plan	5	4	3	2	1	N/A
9.	Controlled class pace and direction	5	4	3	2	1	N/A
10.	Summarized material	5	4	3	2	1	N/A

Use of Course Material		Excellent				Poor	
11.	Made effective use of handouts	5	4	3	2	1	N/A
12.	Made effective use of other aids	5	4	3	2	1	N/A

Return this form to the instructor, fax it to **972.538.6850**, or mail it to the following address:

ExoLink Corporation
Training Evaluation
401 E. Corp. Dr., Suite 101
Lewisville, TX 75057

Course Evaluation Form

Instructor Name: ____________________ **Subject:** ExoLink's Online Solution

Dates Conducted: ____________________ **Location:** ____________________

Overall Evaluation		Excellent				Poor	
1.	Course met stated objectives	5	4	3	2	1	N/A
2.	Instructor effectiveness	5	4	3	2	1	N/A
3.	Materials	5	4	3	2	1	N/A
Critique of Course		Excellent				Poor	
4.	Applicable to your work	5	4	3	2	1	N/A
5.	Time allocated to the course	5	4	3	2	1	N/A
6.	Amount of material covered	5	4	3	2	1	N/A
7.	Handouts for the course	5	4	3	2	1	N/A
8.	Value of exercises	5	4	3	2	1	N/A
9.	Visual aids	5	4	3	2	1	N/A
Critique of Instructor		Excellent				Poor	
10.	Established objectives	5	4	3	2	1	N/A
11.	Responded to questions and input	5	4	3	2	1	N/A
12.	Used effective examples	5	4	3	2	1	N/A
13.	Presented information clearly	5	4	3	2	1	N/A
14.	Summarized material	5	4	3	2	1	N/A
15.	Taught at class level of understanding	5	4	3	2	1	N/A
General Critique		Excellent				Poor	
16.	Class facilities	5	4	3	2	1	N/A

Suggestions for improvement and general comments:

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____

____

Signature: ________________________________ (Optional) Phone: _______________