

Supervisor Responsibilities

Step1 Supervisor Role

The Step1 Supervisor's Role is critical to the successful operation of your STEP1 system. Your STEP1 system supervisor(s) is the primary contact between your company and the STEP1 Support Department. The following is a summary list of STEP1 Supervisor Responsibilities, followed by a more detailed explanation of each responsibility.

Supervisor(s) Responsibilities Summary

1. Supervise overall operation of your STEP1 system.
2. Serve as primary contact between your company and the STEP1 Support Department.
3. Train other staff members in how your company has chosen to use and implement STEP1.
4. Monitor your STEP1 Software Solution's daily health through the Supervisor's Module.
 - a. Confirm DBQ / DBComm are cycling properly.
 - b. Verify email is being sent out of system.
5. Verify Backup of STEP1 Data Files daily.
6. Monitor information entered into the system for accuracy and confirm daily posting.
7. Take care of any Data Check errors immediately.
8. Make sure day, week and monthly processing is completed properly, that all necessary reporting is provided to management, and that balances are verified.
9. Make sure 'open next post period' procedures are being run properly.
10. Maintain adequate free disk space for STEP1's needs.
11. Make sure the Data Server is brought up and down properly.
12. Make sure all users follow proper login/logout procedures.
13. Workstation, Server and Network Trouble Shooting.
14. Security/antivirus malware software and virus removal.

Supervisor Responsibilities Overview

1. Supervise overall operation of your STEP1 system.

STEP1 supervisor(s) need to keep an eye on the overall operation of the system and its utilization within the organization. STEP1 Support Staff are available to advise and train system supervisors, but the supervisor needs to take the lead role in deciding how best to implement and maintain the system. Supervisor tasks include prioritizing and coordinating training with STEP1 support, deciding how to best implement and maintain your company's use of the tools available in the system, making sure information is being entered accurately, responding to your staff's system operation and training needs, and ensuring that your STEP1 system is operating efficiently and reliably.

2. Serve as primary contact between your company and the STEP1 Support Department. As Supervisor, you are the person most familiar with both your STEP1 system and with your company's processes. Therefore, if one of your users runs into a problem, you are the first person they should turn to for help. If you are not able to resolve their problem, and the documentation does not shed any light on the situation, contact STEP1 Support using Help->Ask Support or call (800)553-2602. Refer to the 'STEP1 Support Services' help topic in the STEP1 Supervisor's manual for further information on support services.

3. Train other staff members to use STEP1 procedures.

It is critical that you, as supervisor, have a thorough understanding of how your company will utilize the tools available to your staff in STEP1. As your company's STEP1 Supervisor, you will provide ongoing training to other staff members.

4. Monitor Overall System Health.

The best way to monitor your system's overall health is to review the 'Status' Tab in the STEP1 Supervisor Module on a daily basis. This tab summarizes — in one convenient location — all of the system status information that you will monitor as the STEP1 Supervisor. Checking the status tab daily allows you to identify and address any potential problems, easily and promptly.

5. Backup STEP1 Data Files Daily.

STEP1 is designed to minimize the risk of data loss due to power interruptions, hardware malfunctions or operator errors. However, the possibility of data loss cannot be completely eliminated from any technical system. Therefore, it is critical that you backup and archive your STEP1 data files on a regular (i.e. daily) basis. Major problems can and do arise. STEP1's Support Department cannot restore your system without an up to date backup. Please refer to 'STEP1 Data Backup/Restore Procedures' for guidance in setting up and maintaining your backup files.

Make sure all posting runs properly on a daily basis.

6. Run all postings on a daily basis.

You will find un-posted entry information summarized on the STEP1 Supervisor's Status Tab. This information is divided into two categories:

a. Current period entries

These entries will be posted the next time you run the appropriate posting procedure. After running all postings, this column should be all zeroes.

b. Future period entries

These entries are held until the future month specified has been opened.

7. Check all STEP1 Data Checks daily.

In addition, if a critical procedure such as posting or closing is interrupted for any reason, you should run All Data Checks to identify any errors before you continue with any STEP1 processing. If errors are encountered, they should be taken care of immediately. Then the appropriate Data Check should be run again to make sure that all of the errors were taken care of. Your goal should be to keep the '# Errs' column at zeroes for the Data Check Status Summary shown on the STEP1 Data Check tab.

8. Monthly Processing

Make sure month-end processing is done, and reports are printed, and that all appropriate balances are verified. All month-end processing procedures (such as issuing customer service charges), should be run. Then all of the reports for your accountant should be printed. Verify the balances on these reports before printing the rest of your month-end sales reports. Refer to the 'Month/Quarter/Year-End Processing' topic for more info.

9. 'Open next post period' procedures

Make sure open next post period is run properly, on a timely basis. STEP1 recommends everyone be out of the STEP1 system when you open the next post period. You should also make sure that the AR and AP aging procedures ran properly in the queue.

10. Maintain adequate free disk space for STEP1's needs.

The amount of available disk space should be watched closely to be sure that enough is available for STEP1's temporary disk space needs. The amount of disk space is shown on the STEP1 Supervisor module. If the free disk space is falling below 4Gig, steps should be taken to free up more disk space (Check all drives on a partitioned system).

STEP1 Network Responsibilities

Supervising a Network

In addition to the responsibilities that the STEP1 Supervisor has in a single user system, there are several responsibilities associated with supervision of a STEP1 network.

11. Make sure the Data Server is brought up and down properly.

STEP1's Network Systems are already set up and optimized for both performance and ease of use. To bring up the STEP1 data server, simply turn it on. Allow a few minutes for the data server to come up and for the 'Logon' menu to appear on screen. Now the workstations can be turned on. They will automatically find the server, and allow users to login.

To take the file server down:

- 1) Have everyone logout.

2) Click on Start/Shutdown (or Restart).

Note: Most STEP1 users take advantage of the queue, and run numerous procedures at night. As a result, it is rarely necessary to take the data server down (down times are typically scheduled in advance, over weekends).

12. Make sure all users follow proper login/logout procedures.

The STEP1 system requires a unique login name for each network user. A unique login controls access, increasing security and confidentiality within a multi-user system. For each networked system, every user must login under their own name and password. The STEP1 Supervisor is responsible for ensuring each user is set up in the system, understands and follows proper login/logout procedures. STEP1 is an internet-enabled system. As with all internet-enabled systems, passwords must **always** be used.

13. Workstation, Server & Network Trouble-Shooting.

Keep equipment free and clear

Workstation cables must be kept organized, tangle-free, out of high-traffic areas and away from potential sources of electrical interference. Kinks in cables can affect performance.

Battery Back-up

STEP1 advises battery back-up for each workstation, including a dedicated battery back-up for your file server, to protect your data against power-outages.

In summary, a network is larger than a single user system; linking more computers, more users, and managing a higher number of data transactions. The STEP1 system and support services have been designed to support the Supervisor in administrating a higher capacity networked environment with the efficiency, effectiveness and accessibility of a one to one service environment. The STEP1 Supervisor's role in maintaining a smooth and reliable network environment is a key success factor in the successful operations of your STEP1 system.

Clean Healthy Systems

14. Security/Anti-Virus/Malware.

Up to date virus scanners on all computers are becoming increasingly important. A virus can spread rapidly from one to all computers in your network. The Supervisor is responsible for maintaining these virus scanners and confirming they are updated properly. STEP1 also recommends installing Windows Critical Updates on all computers when they are released from Microsoft. These are program fixes and changes in the operating system, developed by Microsoft to block or disable security holes in the operating system software.