ECM+ Application

Quick Start

Business Process and Performance Management System

Contents

Intoduction

This book is a quick-start manual for **ELMA ECM+** based on **ELMA BPM Platform**. It is intended for users who want to master **ELMA BPM** on their own, and for professionals who plan to implement **ELMA**. The main goal of the book is to give a basic understanding of how to work with the **ELMA ECM+** application.

It is expected that you are already familiar with the basic **ELMA** functions described in the **ELMA BPM Platform quick-start manual**. It is also expected that the system is prepared for work with the **ELMA ECM+ application,** with a created organization structure and set of users (the **ELMA BPM Platform** manual provides instructions on how to do that).

Below is the list of quick-start manuals:

- Quick Start of **ELMA BPM Platform**
- Quick Start of **ELMA Web Portal**
- Quick Start of **ELMA ECM+**
- Quick Start of **ELMA CRM+**
- Quick Start of **ELMA Projects+**
- Quick Start of **ELMA KPI**

For more details on the **ELMA ECM+** functions see **ELMA Help**.

The **ELMA Knowledge Base** (http://www.elma-bpm.com/kb/) provides a description of numerous technical issues and is constantly updated by the company's specialists.

This book is a tutorial rather than a reference guide; it gradually describes the main functions and settings of **ELMA ECM+**. Before you start to read this manual, we recommend you to get acquainted with the **ELMA BPM Platform quick-start manual** which offers a basic understanding of the system.

The book shows an example of how to organize work with incoming mail and describes functions that facilitate managing outgoing mail in the scope of electronic document workflow in **ELMA**.

Chapter 1. ELMA ECM+ Application

ELMA ECM+ is a solution for Enterprise Content Management, based on the **ELMA BPM Platform**. **ELMA ECM+** helps to organize electronic document management in your company and allows you to execute end-to-end business processes along with standard document flow processes.

Any company has to manage their documentation, whether it is simple paper communication between the manager and the accountant or a complex electronic system of parallel and serial operations with documents. The **ELMA ECM+** application provides flexible document routing within your company. Several users can work on one document at the same time and communicate easily between each other.

ELMA ECM+ app enhances **ELMA Platform** on document management and allows you to:

- Create and manage new document types and document control cards;
- Automatize the records management and document registration;
- Organize document storage which allows setting access permissions to the documents;
- Route documents;
- Set up digital signing of documents;
- Manage documents by such typical procedures as acquaintance and approval;
- Create same-type documents from a template;
- Use document encryption and digital signature to increase the information security.

Chapter 2. Creating Electronic Document Flow

Electronic document implementation is a process of converting paper documentation into electronic document flow. All procedures familiar to you when you do paperwork are carried out in electronic form.

These procedures are well regulated by **MoReq2** (http://moreq2.eu/), a European standard for electronic document management. According to this standard, converting to an electronic form requires execution of the following basic processes: creation, capture, flow, display, store, search, route, security, and control. This approach makes implementation systematic and allows splitting the whole flow into separate elements.

Here is a list of goals typical for an electronic document workflow:

- Reduce costs of paper documents;
- Accelerate information flow, reduce time for approval of documents, allow for digital acquaintance with documents;
- Store document history;
- Create a structured document register according to the company's records classification scheme;
- Prevent document loss;
- Control work with documents;
- Increase compliance standards;
- Make is faster to search for documents;
- Reduce the amount of paper copies and control the amount of printed documents;
- Use digital signature auditing to increase information security;
- Offer the executives a flexible tool that allows receiving information on the quality of document handling;
- Distribute corporate standards and make sure that the employees adhere to them.

In order to accomplish these goals, you have to start by setting electronic document workflows within the EDM system of your company. Here are some examples of common electronic document workflows: Incoming documents, Outgoing documents, Contracts, Internal documents, Financial documents.

Before implementing, you have to describe all the processes engaged in a workflow (Fig. 1).

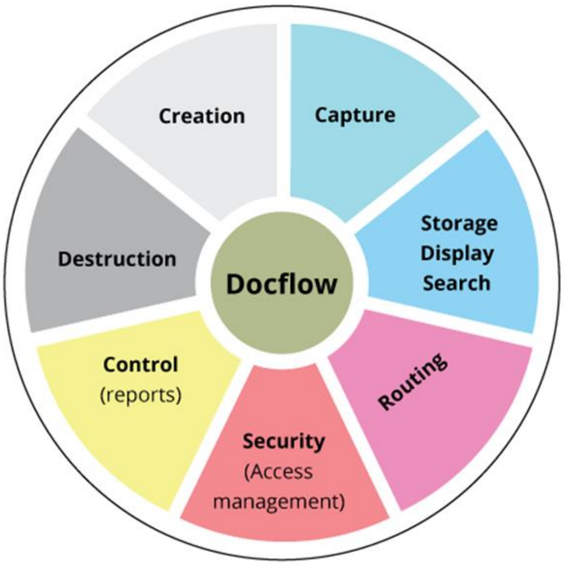


Fig. 1. Electronic Document Management Workflow

Each document flow is surrounded by a set of processes that you have to describe and implement. Let's take a look at a company's incoming and outgoing mail, where documents belong to the Incoming and Outgoing flows respectively.

Description of basic processes in a workflow:

Creation. Usually a document is created outside of the system (for example, an incoming letter, which is clearly not written in the company that receives it). At the same time, a draft of an outgoing letter may well appear in the system and can actually be formed by the system itself (in this case, the **Creation** and **Capture** processes partly coincide).

It is important to define how and where a document is created in a document flow.

Capture. This process describes how a document enters the system, what information is created apart from the document version itself, how the document is classified, who is responsible for creation, verification, registration, etc.

Take a look at an incoming letter. Its capture involves scanning the letter or a fax, or receiving a document file as an e-mail attachment. When creating a document card in **ELMA**, you have to include the file itself, the sender, receipt date, letter's registration number and subject.

An outgoing letter or message can be generated by the system from a template. A generated file is captured automatically. Then you have to add the addressee, subject, method of sending, and specify if it is a response to another document.

Routing. This procedure includes all the rules and routes that a document takes when it is introduced into the system. You can specify a certain route, that is, a sequence of operations that have to be performed with the document. With standard routes, each document is guaranteed to pass all the stages; the executors cannot lose it, and they are bound to complete all the tasks on time.

A routing process for an incoming letter may include the following steps: introduction into the system, revision by superior, acquaintance, execution and control of document-related tasks.

A routing process for an outgoing letter may include the following steps: document creation, approval, signing, registration, sending to addressee, delivery check.

Learn how to create a document route in section 3.5 of this manual.

If there is no strict route for a document, you can use the standard features of **ELMA ECM+** available in **Web Application**: sending for approval, consideration, signing and registration. In manual mode you can set any operation order you like (see Chapter 5).

Storage / Display / Search

This process specifies how the documents are stored, displayed (regarding the role model) and searched for.

In **ELMA**, all documents are stored and displayed in folders specially created for document storage (see Section 3.4. Configure Storage of Incoming Documents). You can find it in the **Documents** section of **ELMA Web Application**. Search is performed with standard **ELMA** functions (Chapter 8. Document search), which provide search by name and properties. Additional settings allow you to use the full-text search (however, keep in mind that full-text search is not supported in **ELMA Express** edition).

Organize storage of incoming and outgoing mail by creating new folders (see section 3.4.1). You can use filter folders for quick access to required documents. They allow you to find the necessary documents in few clicks (see section 3.4.2).

Security (Access Management)

This process specifies how access permissions for documents are given and how access auditing is done (if necessary).

ELMA provides flexible settings for access permissions to documents and folders. Also, you can always use inherited permissions. You can set up the access in the document's route in manual mode when assigning document-based tasks. There are several levels of access to a document: **view/load**, **edit**, **give access**, **full access**. In addition, you can manage access to create and sign certain types of documents. See section 3.4.3 for more information on access settings.

Control (Reports)

This process includes reports and tools that allow you to control the work of a document flow.

In **ELMA** you can create reports on whichever documents and document-related tasks you like, basing on specific parameters. **ELMA** also includes typical reports. “Report on document task compliance” allows you to monitor document-related tasks, while “List of category records” provides a list of documents that belong to a category.

You can monitor timely work performance with filter folders (that have different filter options), process monitoring, portlets set to display documents with specified statuses only, and so on. For more details on these features, see the **ELMA BPM Platform quick-start manual**.

Destruction

This process concerns archiving documents.

ELMA ECM+ features a specially designed storage for outdated documents, the **Archive** (Chapter 6. Document archive). You can find it in the **Documents** section.

If necessary, you can configure a document routing process to automatically send a document to the archive, say, at the end of the route.

Once the document is placed in the **Archive**, a user with corresponding access permissions can delete it from the system. If this document is involved in document routes and tasks, it will be displayed as *deleted*, and the document version and its properties will no longer be available.

The system can store incoming letters and other similar documents for an unlimited period of time. If you need you to, you can place them into the **Archive** manually. Whereas the outgoing letters that have not been approved, signed or sent can be placed into **Archive** immediately after their draft is rejected. You can include this option in the routing process for incoming mail.

Once you have described and specified all the workflow processes for a selected document flow, you can start implementing the workflow.

Further on, you will learn how to set up processing of incoming mail in **ELMA ECM+** and will take a look at all the basic functions of this application.

Chapter 3. Incoming Mail Processing

Now let's add the abovementioned basic document flow processes to the **ELMA ECM+** application. Consider a company with about a 100 employees that supplies and offers installation and maintenance services of industrial equipment. It has several offices, as well as storage and production premises.

Suppose, the company corresponds with customers, suppliers and authorities quite a lot. Some of the incoming mail goes to the main office, the rest goes to all the other offices. Sometimes, employees receive official e-mails.

The secretary of the main office decides how a letter must be handled. Then he or she gives the original document to the executive who is responsible for considering the letter. The secretary can also arrange to send scanned documents by request.

The secretary or the executive then control how the document-based tasks are executed. There is no strict form of control. Once the tasks are executed, the original letter is sent back to the secretary and then to the paper archive.

The company faces several problems in dealing with incoming mail:

- Missing originals; finding a document takes a lot of time;
- Some of the letters are not registered and read. Only the mail that the secretary handles is registered;
- Poor execution control;
- Document processing takes very long;
- Poor confidentiality.

ELMA ECM+ helps you solve these problems. It offers useful tools and features with which you can specify the responsible person, set up task monitoring, and organize document storage with search options and access permissions. It is also possible to create formal routes, so that documents can be processed according to specified procedures.

In **ELMA ECM+**, a document management system is organized in a few steps:

1. Decide which document types to include in the document flow.
2. Create and configure the document types. Define such things as the document structure and the creation procedure.
3. Set up registration. If all the documents are registered, they are easy to find by their registration number.
4. Organize storage and set access permissions. At this point you implement the following document workflow processes: Storage, Display, and Search. You also provide high security by configuring granular access permissions.

Document storage allows managing digital copies of the documents, while the originals are stored in the main office. Varied search features allow you to access a stored document rather quickly, while access management guarantees document confidentiality.

5. Work out document routes. At this stage, you implement the designed routing processes. You can also include the document capture option. The document routes allow you to monitor the execution of document-based tasks and reduce processing time. Moreover, they provide a unified document processing framework for a selected document flow.

This chapter offers a guided setup of incoming mail processing in **ELMA ECM+** “from scratch”. The following chapters describe additional features that you can apply to different document flows.

3.1 Incoming Mail Document Type

A **Document type** is an object with specific attributes (fields). Each document created in **ELMA ECM+** belongs to a certain document type.

There are two system document types, **Web-document** and **File**. You can add more document types with BPM apps such as **Contract Management** or when importing processes and typical solutions from **ELMA Store** (https://store.elma-bpm.com/). The system administrator can create even more document types in **ELMA Designer**.

To manage document types in **ELMA Designer**, go to the **Document Management** tab in the **Documents** section (Fig. 2).

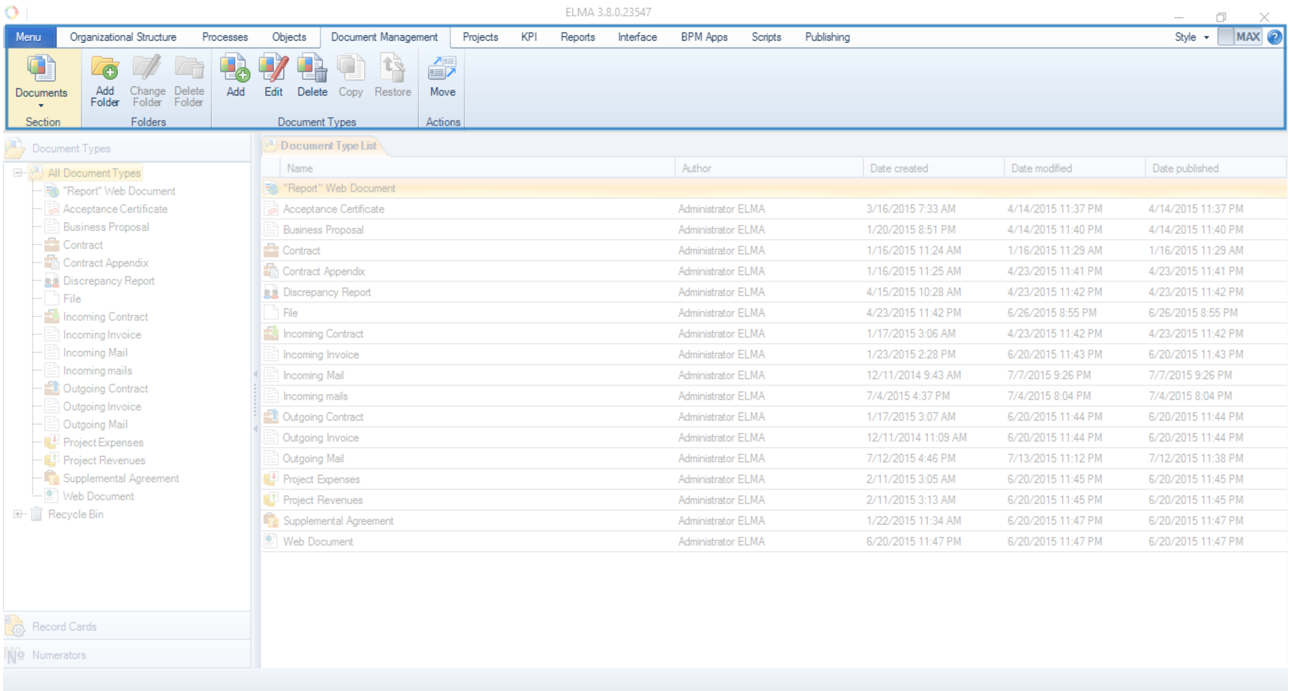


Fig. 2. ELMA Designer. Document Management tab, Document mode

3.1.1 Creating a Document Type

To create a new document type, click either **Add** (Fig. 2) in the top toolbar or **Create Document Type** in the context menu (Fig. 3).

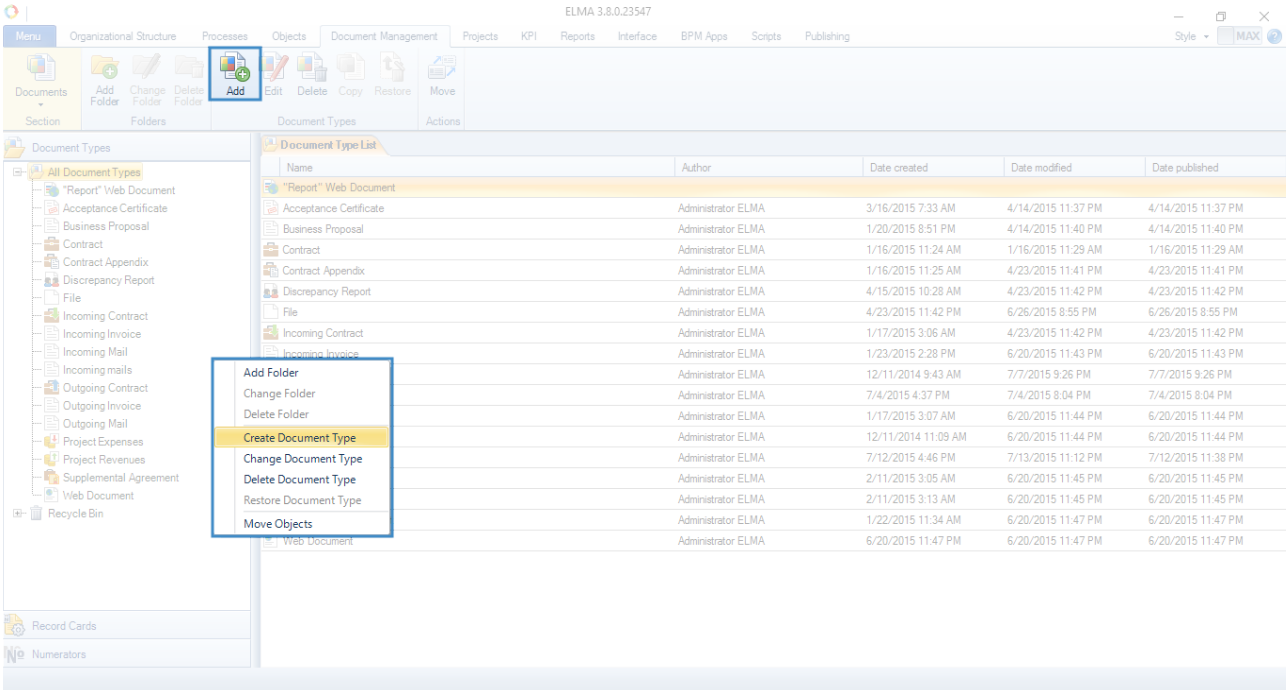


Fig. 3. "Create Document Type" button

Suppose you need to create a new document type, **Incoming Mail**. Once you click **Add** (Fig. 3), the document type wizard opens. There are four steps.

Step 1. General Settings (Fig. 4).

Enter the name of the document type in the **Displayed Name** field. Leave the other fields as they are. The **Class Name** and **Table in Database** fields are filled in automatically, copying the **Displayed Name** field.

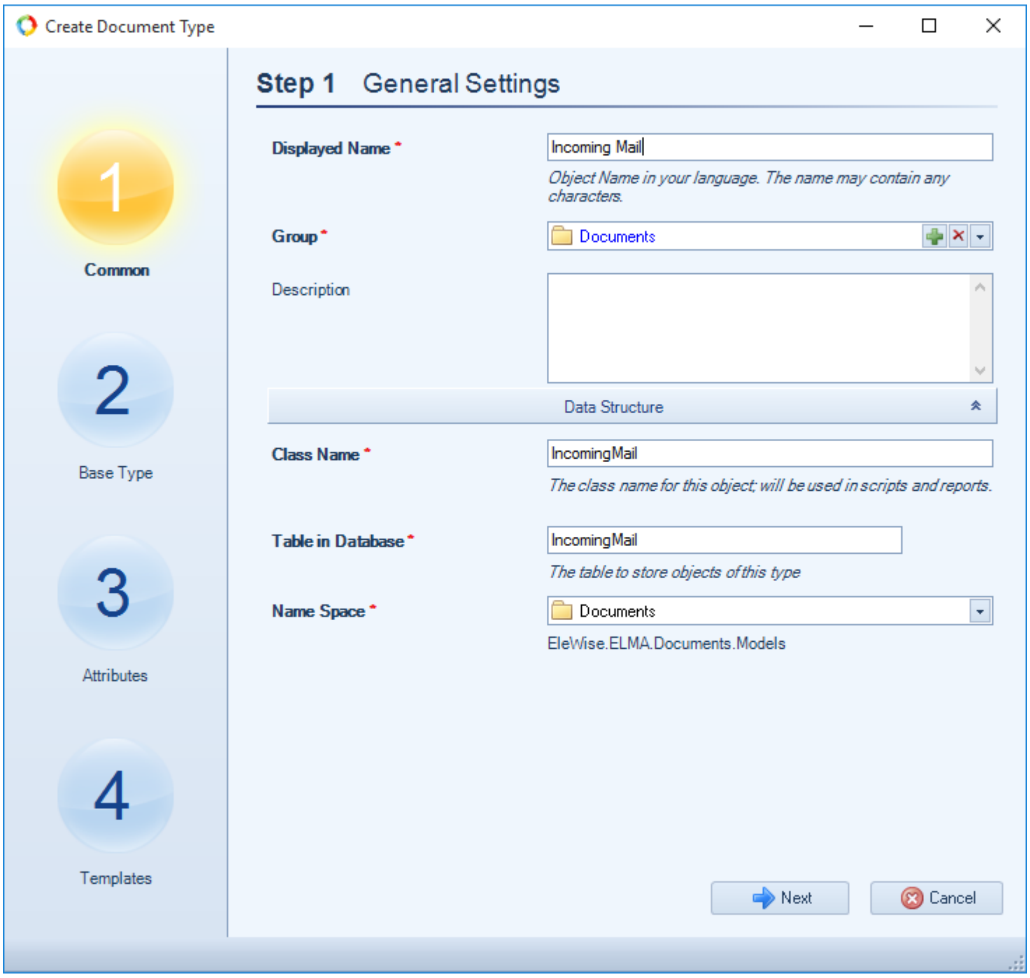


Fig. 4. New document type creation wizard. Step 1.

Click **Next** to continue. Click **Cancel** to stop creating the document type.

Step 2. Select Base Type (Fig. 5).

Specify the basic settings of the document type you are creating. For **Incoming Mail** leave all the default settings and click **Next**.

The **Inheritance and Hierarchy** section allows you to manage two properties, **Base class** and **Allow to create heirs**.

When you create an inherited document type, the attributes of the parent document type (base document type) are copied. New attributes can also be added.

This options makes configuration of a document workflow easier, saving time to design inherited document types. It also allows you to create a single route for several inherited document types, by specifying the base document type as an input variable in the route.

The **Generate Filter** option is used to search the documents of this type.

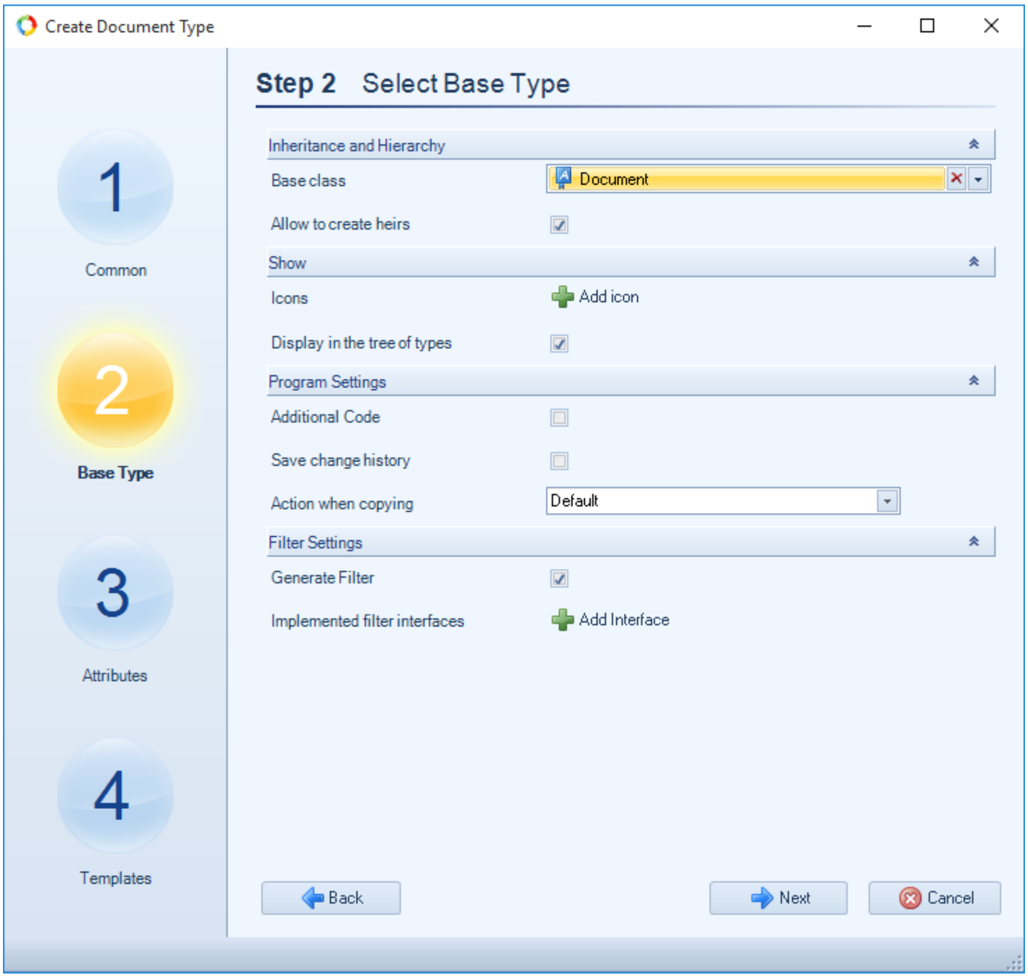


Fig. 5. New document type creation wizard. Step 2.

Step 3. Document Type Attributes (Fig. 6).

Here, you can see the system attributes of the document type. The unique identifier and the properties inherited from the base class are marked green and blue, you cannot change or delete them.

When you create a new document type, you have to enter new attributes. Attributes are fields in the document creation form and its page in the ELMA web application. They become available when documents of this type are managed in **ELMA**. You can skip this step and add or edit attributes after the document type is created.

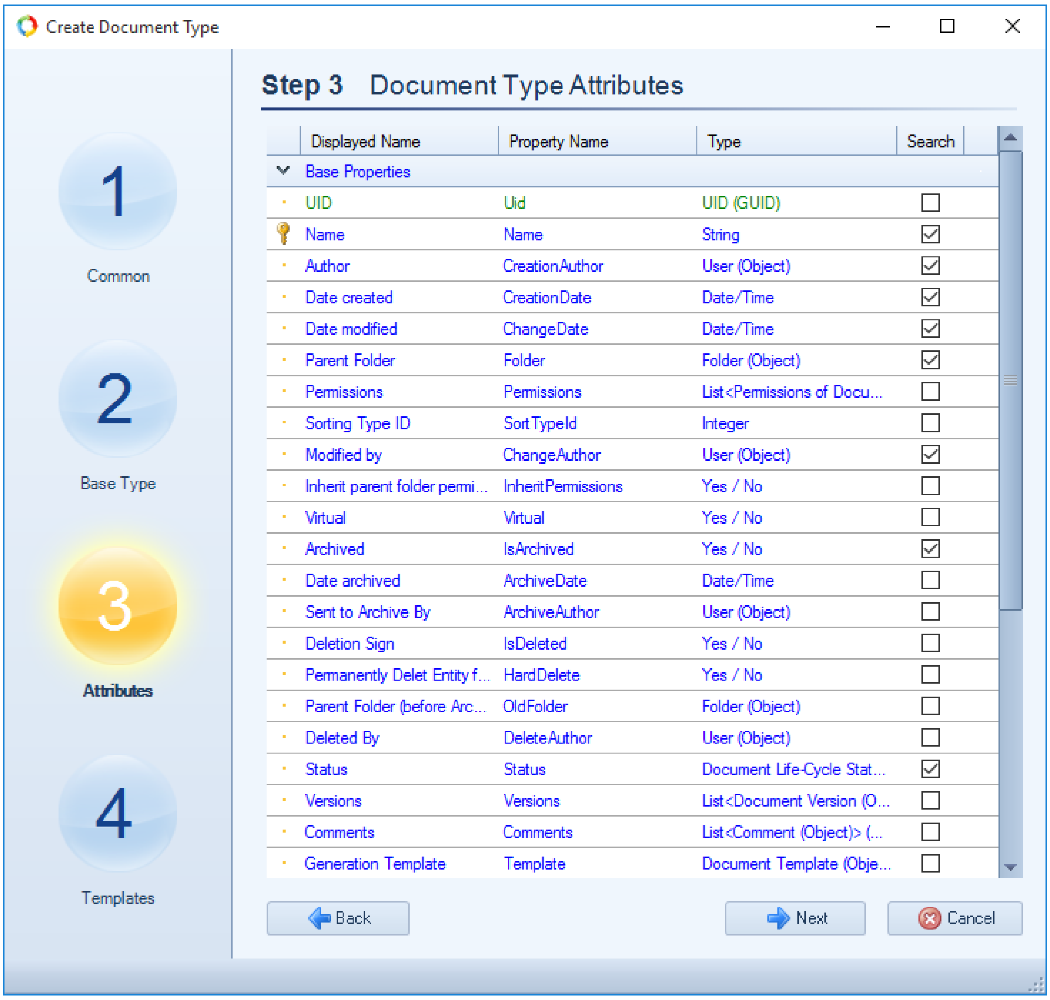


Fig. 6. New document type creation wizard. Step 3

Let's add new properties to the **Incoming Mail** document type:

- ***Subject*, String** type, required field;
- ***Sender*, Contractor** type, required field;
- ***Registration Number*, String** type, required field. You can add a comment in the description, saying "If the letter or message does not have a registration number, specify n/a for this field";
- ***Date*, Date/time** type, required field.

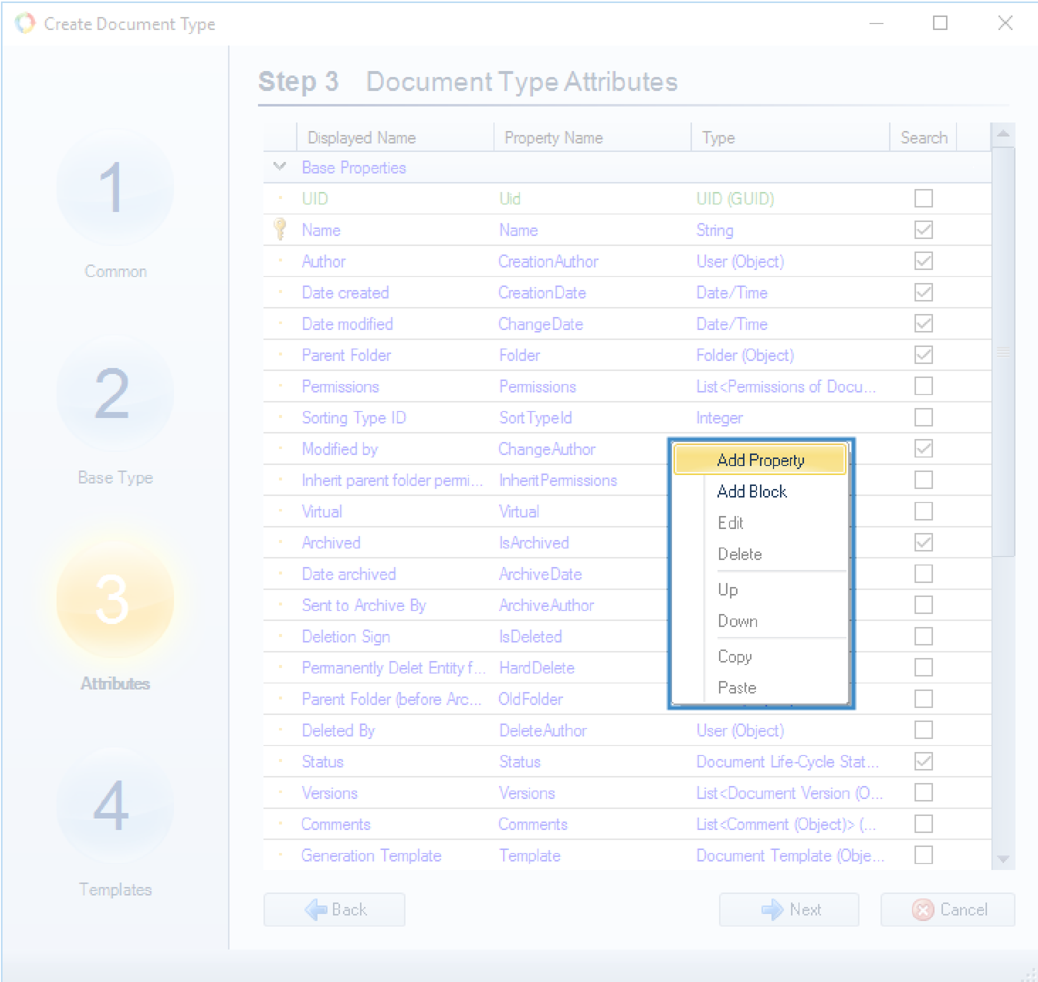


Fig. 7. Adding a new property

To add a property, open the context menu (right-click on the property list) and select **Add Property** (Fig. 7). The "property settings" window appears. Add a name and select the property type (Fig. 8).

Now fill in the **Subject** settings page, as shown in Fig. 8. The **Data Structure** fields are filled in automatically. The **Required Field** option button requires users to always fill in the **Subject** field when documents of this type are created or edited.

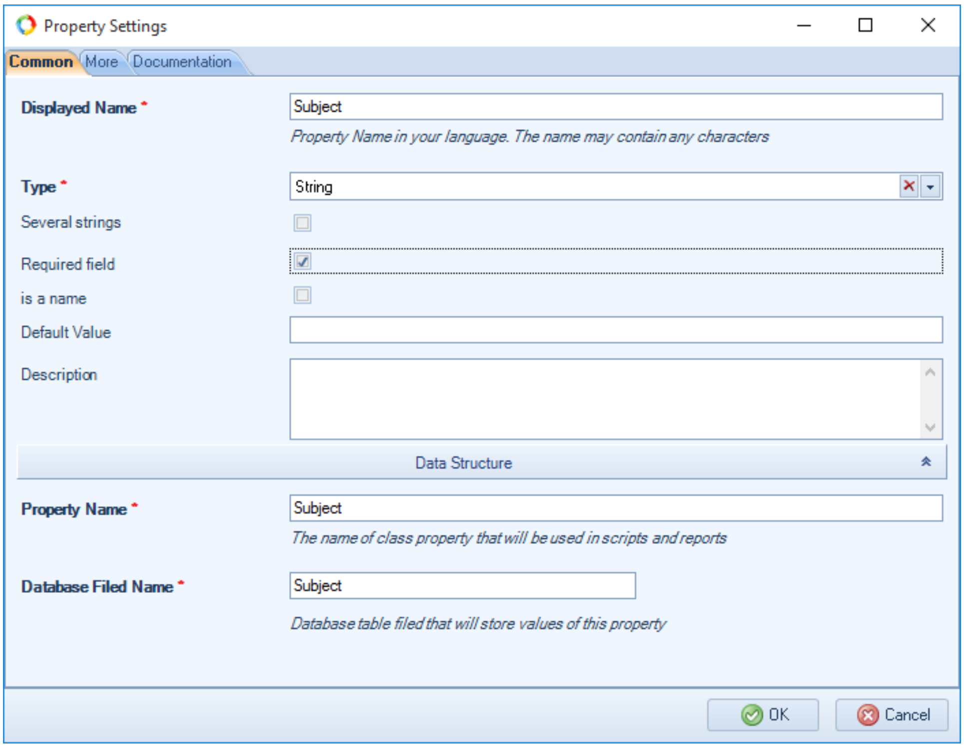


Fig. 8. Document type property settings, Common tab.

To allow search of incoming mail by subject, open the **More** tab of the settings window and select (Fig. 9):

- **Available in Quick Search.** Makes this property available in quick search (for quick search, see section 8.1);
- **Participates in Search (Filter).** Makes this attribute available in advanced search (see section 8.2).

The **Common** and **More** tabs of other document types might look different from Fig. 9.

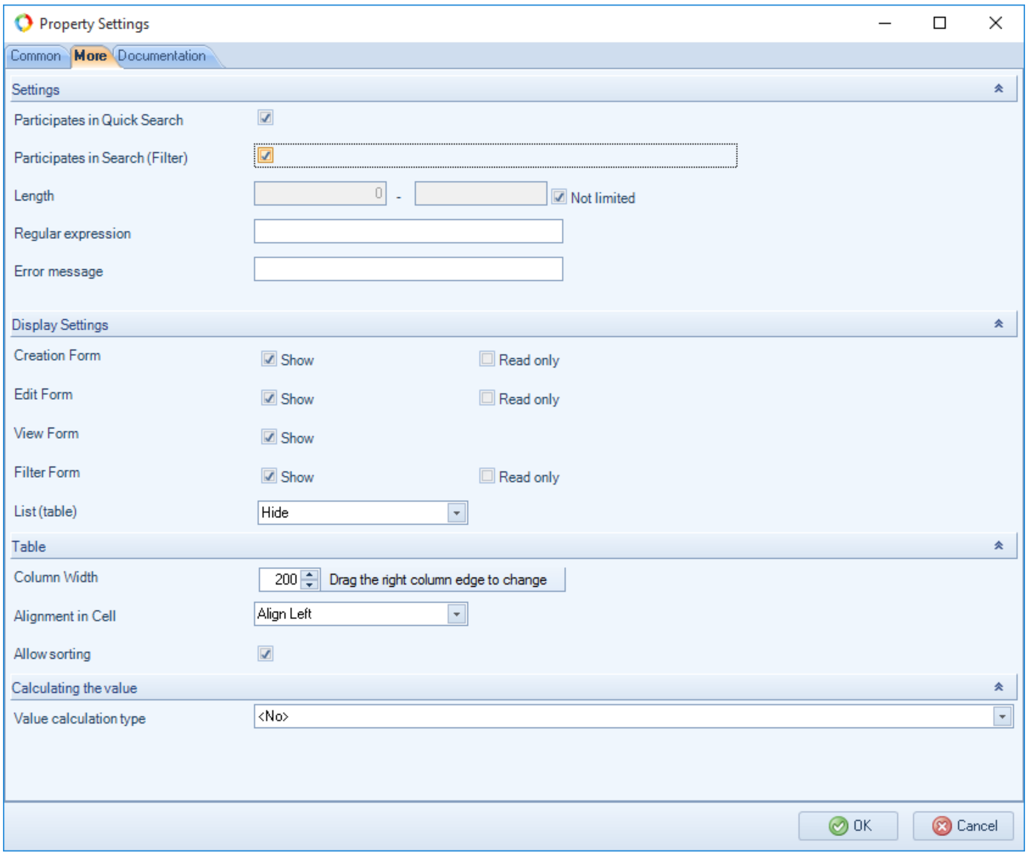


Fig. 9. Document type property settings. More tab.

Click **OK** to save the document type attribute. In the same way add the other three properties, **Sender**, **Registration Number** and **Date**.

All the properties will be added to the property list, marked in black (Fig. 10). You can edit, delete them or add new properties later on.

Click **Next** to continue, click **Back** to return to the previous step, and click **Cancel** to close the wizard.

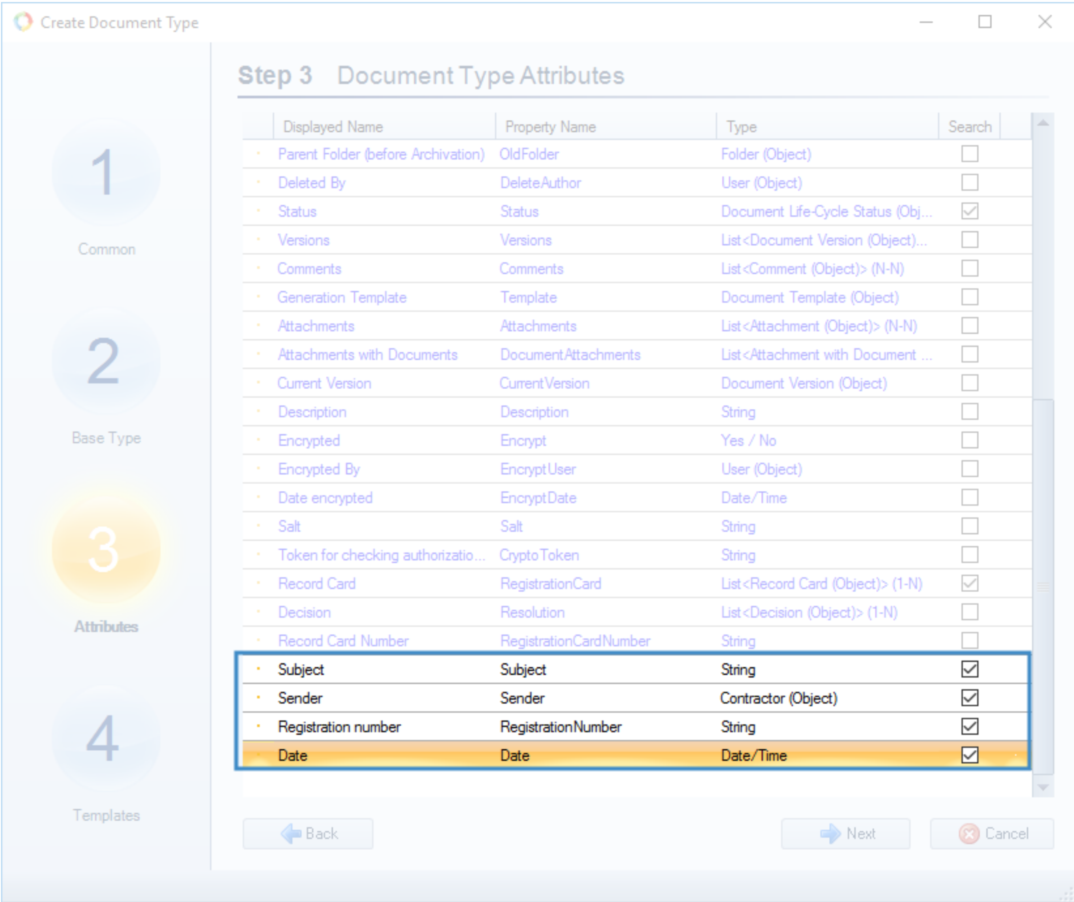


Fig. 10. New document type attributes

Step 4. Document-Type templates (Fig. 11).

The naming template defines how documents of this type are named when created in **Web Application**.

You can use the attributes to name a document. Try to create a name template right now.

To use a document type attribute in your template, click on **Insert Document Attribute** and select the desired attribute (Fig. 11).

Use the following rule for incoming mail name template: *“Registration number” (“Incoming number”)* dated *“Date” “Subject”* from *“Sender”.*

Make the quoted fields in *italics* to fill in automatically. Once the fields are filled in from document attributes, your template will look like this:

{$Document.RegistrationCard[0].RegNumber}({$Document.Registration number}) dated {$Document.Date} {$Document.Subject} from {$Document.Sender.Name}

The **Allow to change document name** option allows users to change a document's name when it is created or edited in **Web Application**. Incoming mail does not require this option, since all the names are generated from a template.

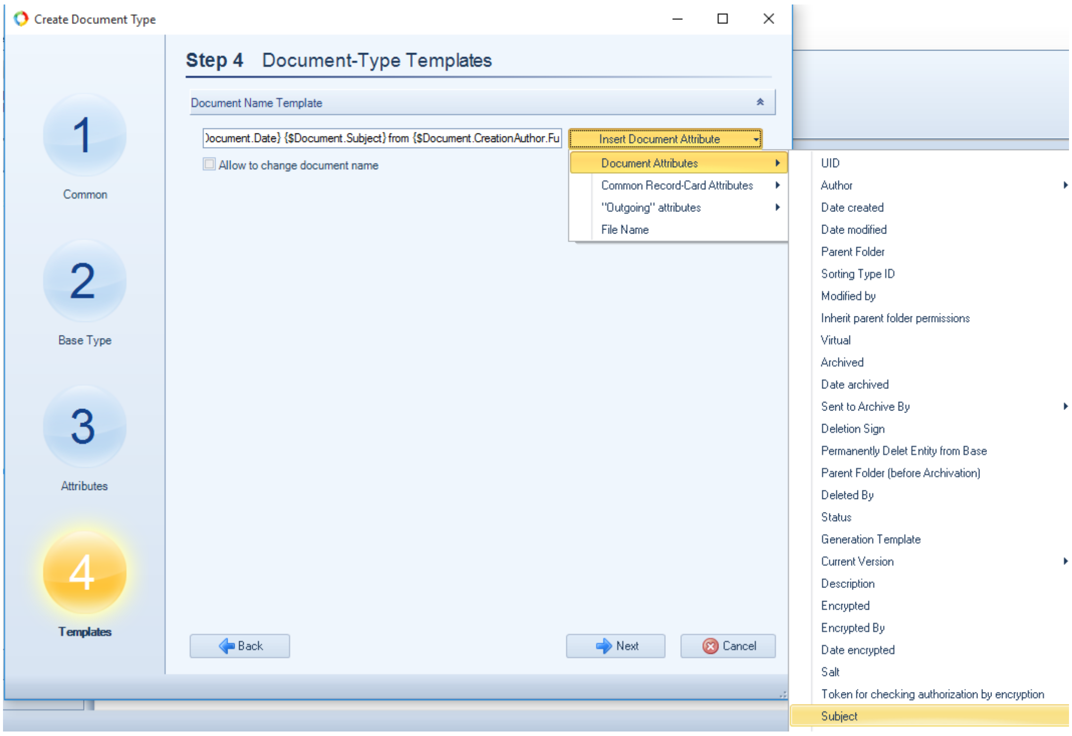


Fig. 11. New document type creation wizard. Step 4.

To finish creating the document type, click **Next**. Once the new document type is created, its page opens in the **Document Management** tab in **ELMA Designer** (Fig. 12). The page displays all the information about the document type, such as its structure and settings.

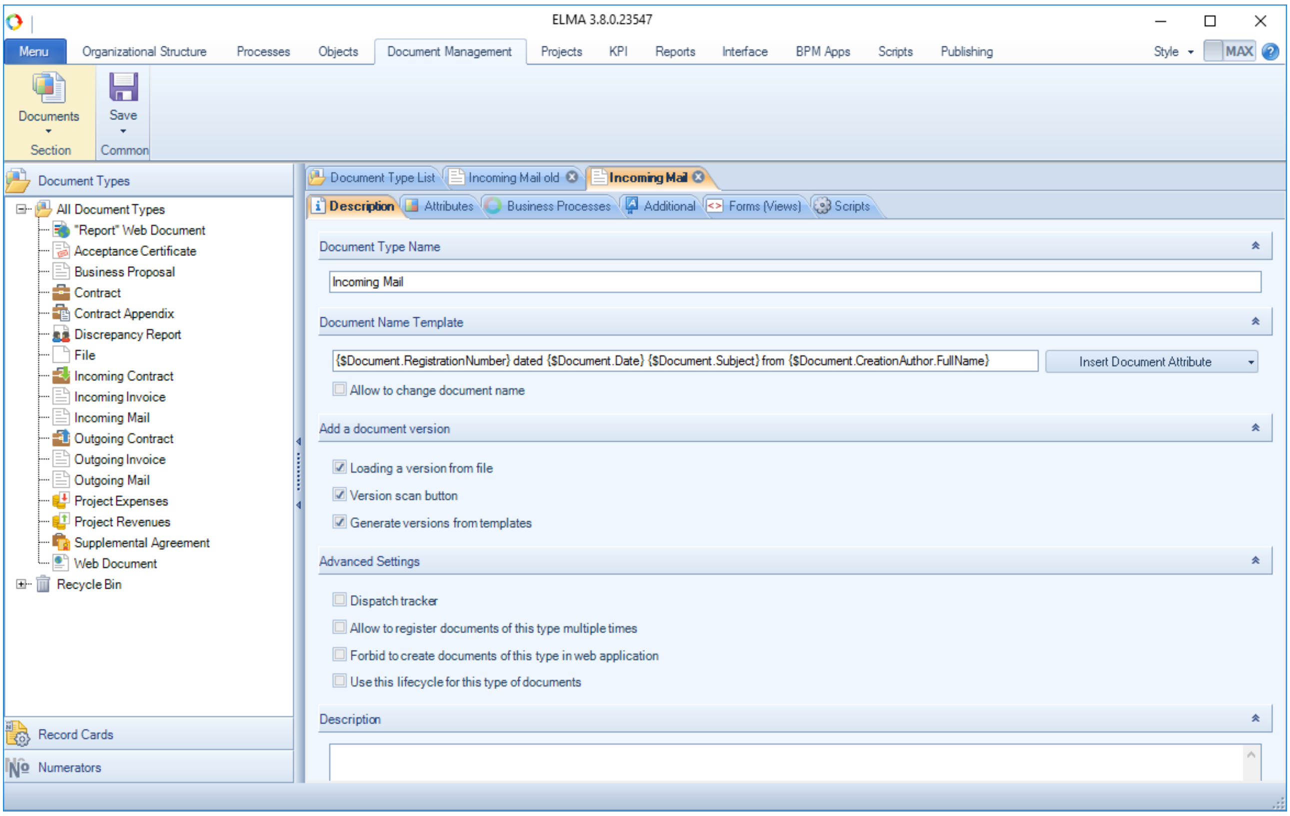


Fig. 12. Document type page for Incoming Mail

For more details on document type pages and their configuration, see **ELMA Help.** This manual only describes the most frequently used functions.

By this moment, you have adjusted all the main settings in the document type wizard. Since incoming letters or emails cannot have a template, disable the **Generate versions from template** option in **ELMA Designer**. It is done in the **Add a document version** section of the **Description** tab.

In the following section of the manual you will learn how to adjust the creation, editing and viewing forms that are displayed in **Web Application**.

3.1.2 Configuration of Document Forms

You can customize how the document forms are displayed in **Web Application**. **ELMA** provides standard viewing, editing and creation forms for any document. You can also edit the Record Card, and register documents that are new or already existing in the system. New Record Card forms for a document type can be configured, too (for more details, see section 3.3.2).

To create or edit document type forms in **ELMA Designer**, go to the **Forms (Views)** tab of the document type page (Fig. 13).

To manage forms, **ELMA** features the **Form Builder** (for more information on the **Form Builder**, see **ELMA BPM Platform quick-start manual** and **ELMA Help**).

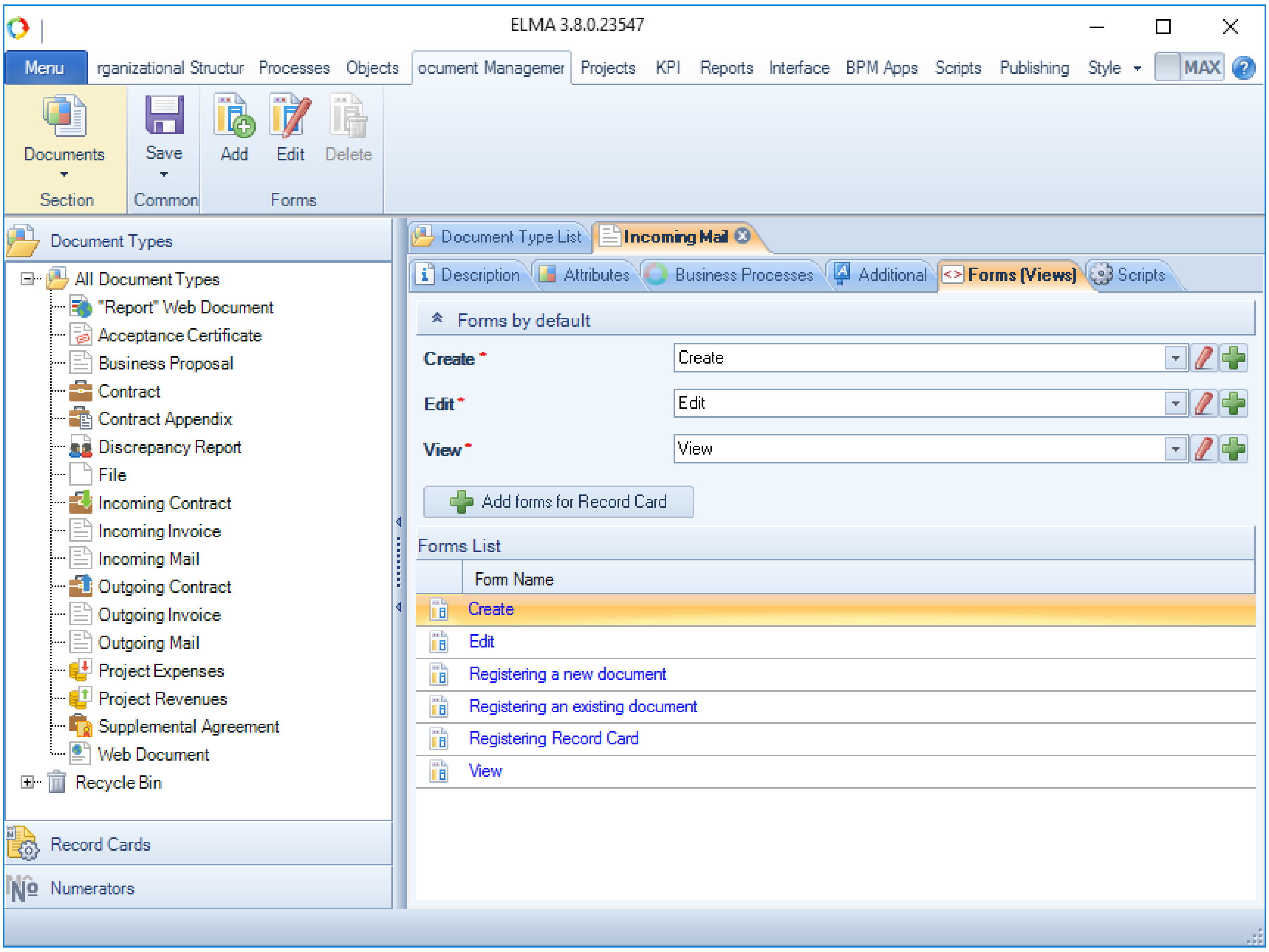


Fig. 13. Document type page. Forms (views) tab.

To create a new form, go to the **Forms by default** section and click the **Add New Form** button on the right side of the form. To edit an existing form, click **Edit Form**. You can also open a form by double-clicking on it in the **Forms List**. The attributes and areas in standard forms are default (Fig. 14).

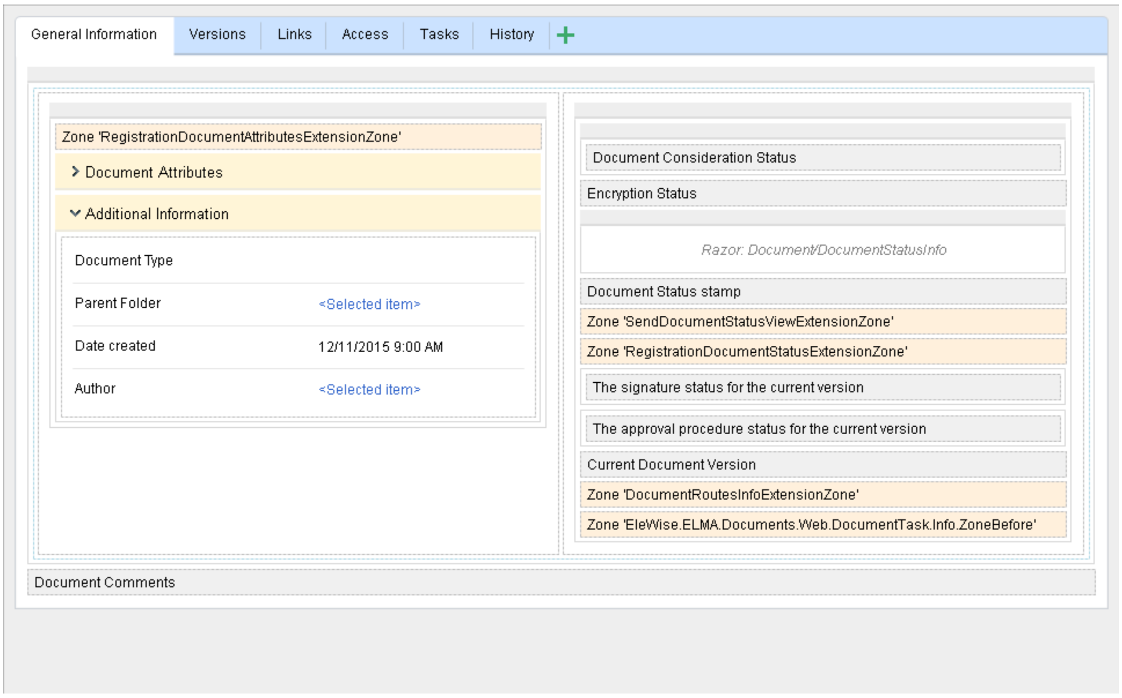


Fig. 14. Default viewing form. General Information tab

A standard document form features a set of tabs that contain document's attributes, elements and various sections. They display information about how the document is handled, its status, current version, etc.

In Fig. 15 you can see how a standard document form is displayed in **Web Application**.

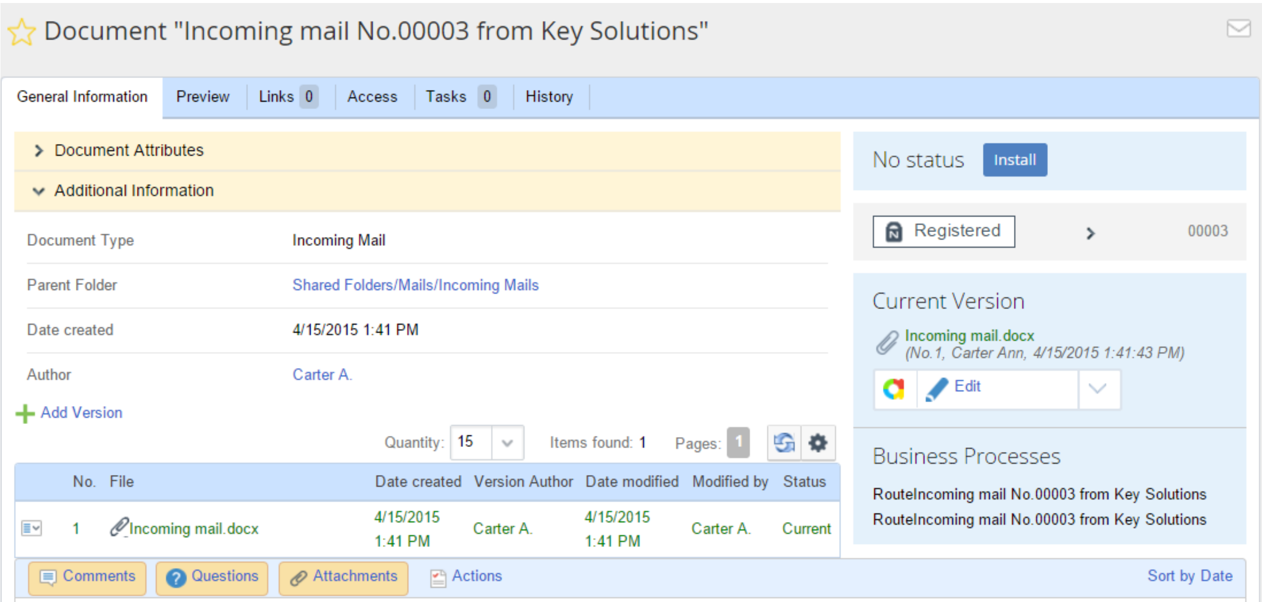


Fig. 15. Standard document viewing form

However, sometimes the standard forms do not include all the details that you might need. Use the **Form Builder** to customize how your documents are displayed in **Web Application**.

Modify the **Incoming Mail** document form. Copy the standard **View** form, title the new form as **“View new form”** and edit it (Fig. 16).

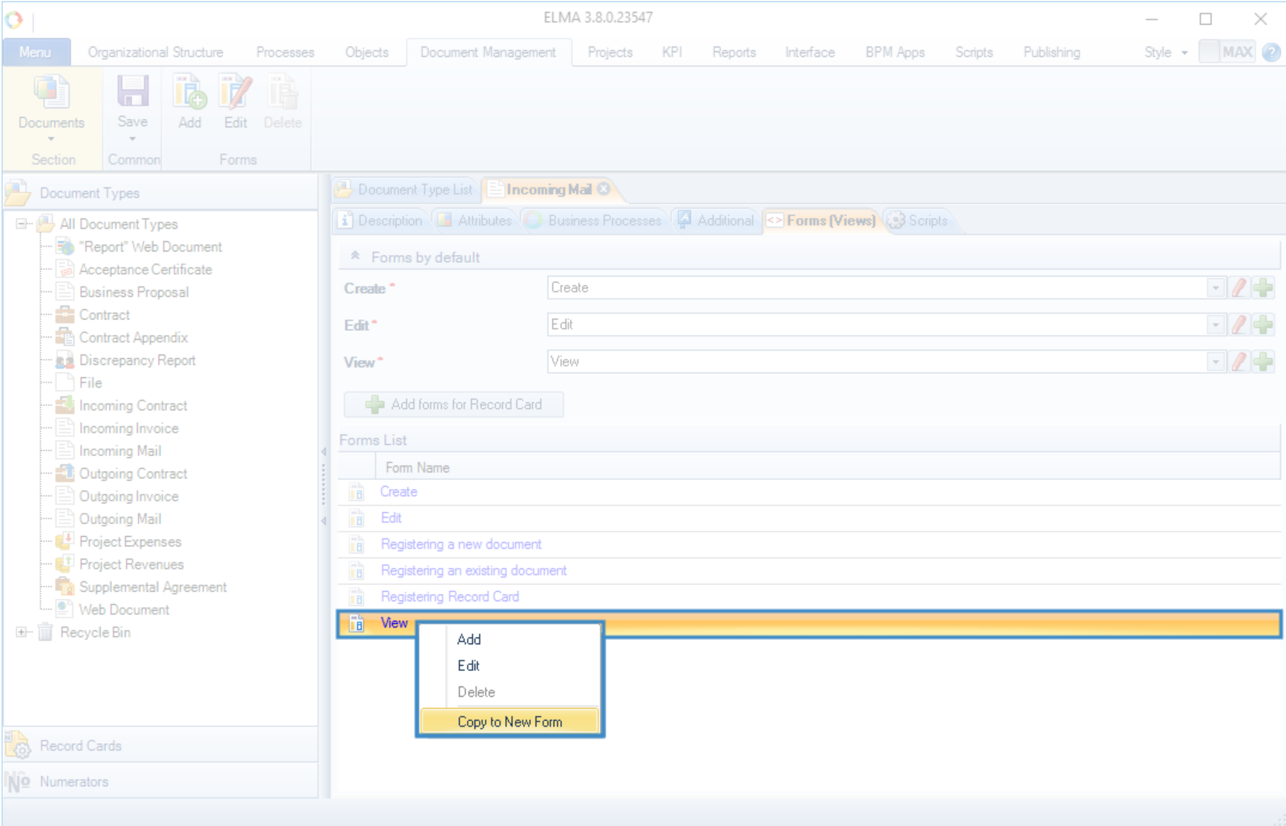


Fig. 16. Copying the View form to create a new form

In **Form Builder** you can move the properties, form elements, section and tabs with the mouse. You can delete elements and properties from the context menu. Right-click to open it.

For customization of document forms, **Form Builder** features several ready-to-use blocks, such as **List of Document Versions**, **Preview of Current Document Version** and **List of Document Tasks**. These elements are located in the left menu of **Form Builder,** in the **Form elements** section (Fig. 17).

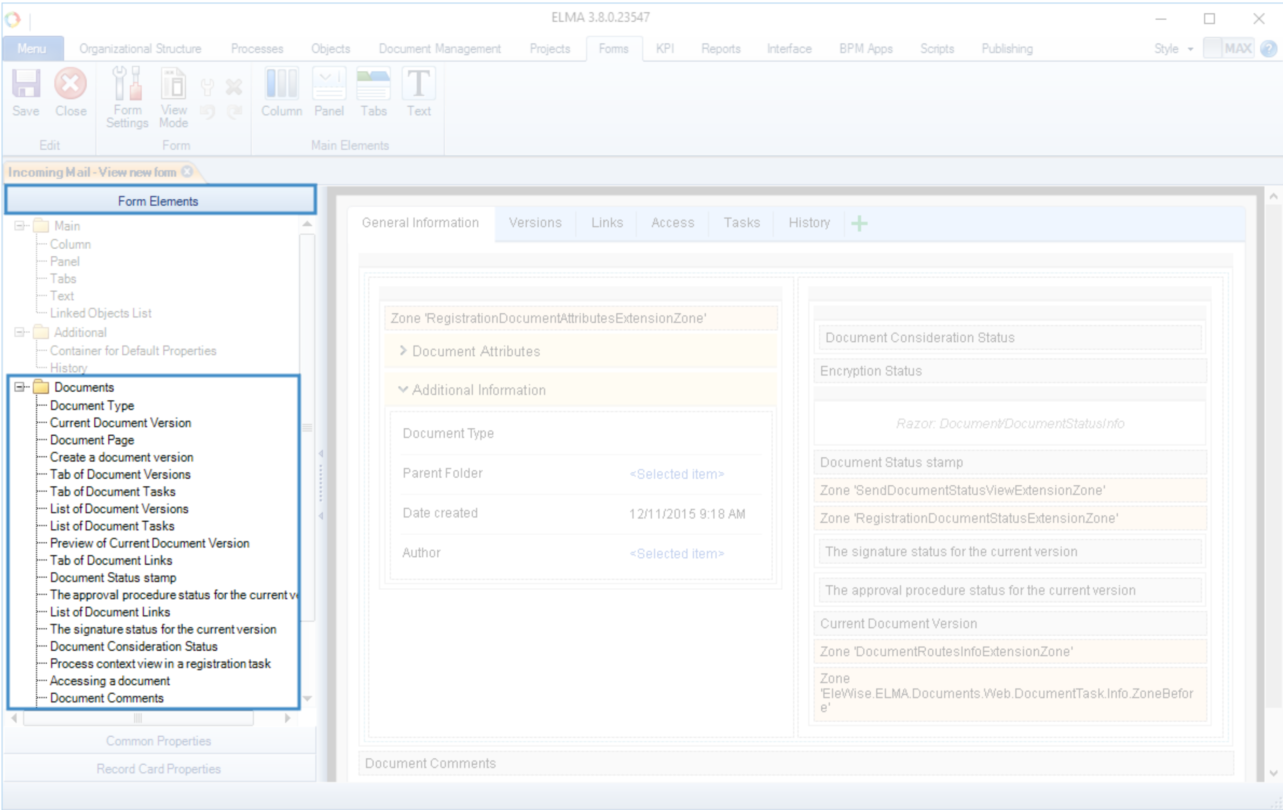


Fig. 17. Form Elements. Documents section.

Now let’s make some changes in the **View new form** form.

1. Make the **Document Attributes** panel non-collapsible and place it in the top part of the left column. To do so, left-click on the panel and drag it the top of the column (above the RegistrationDocumentAttributesExtensionZone zone). Then open the settings window either from the context menu or by double clicking on the panel. Disable **The panel can be collapsed** option.

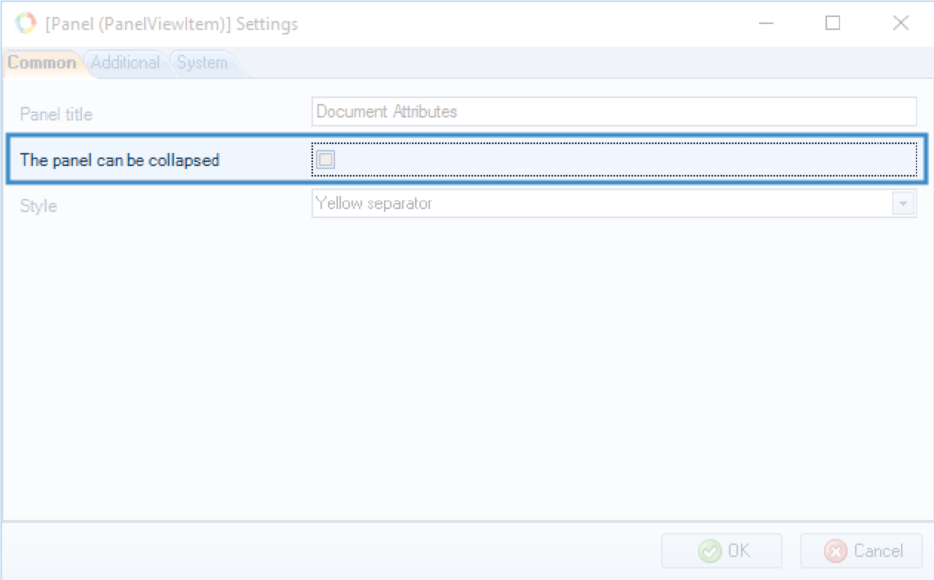


Fig. 18. Panel Settings. "The panel can be collapsed" option.

2. Now you have to add the following properties to the **Document Attributes** panel: **Record Card Number, Subject, Sender, Registration Number, Date**. By default, this panel looks as shown in Fig. 19. All the added properties are placed in the same order as in the record card. This section can also display the **Description** and **Barcode** properties.

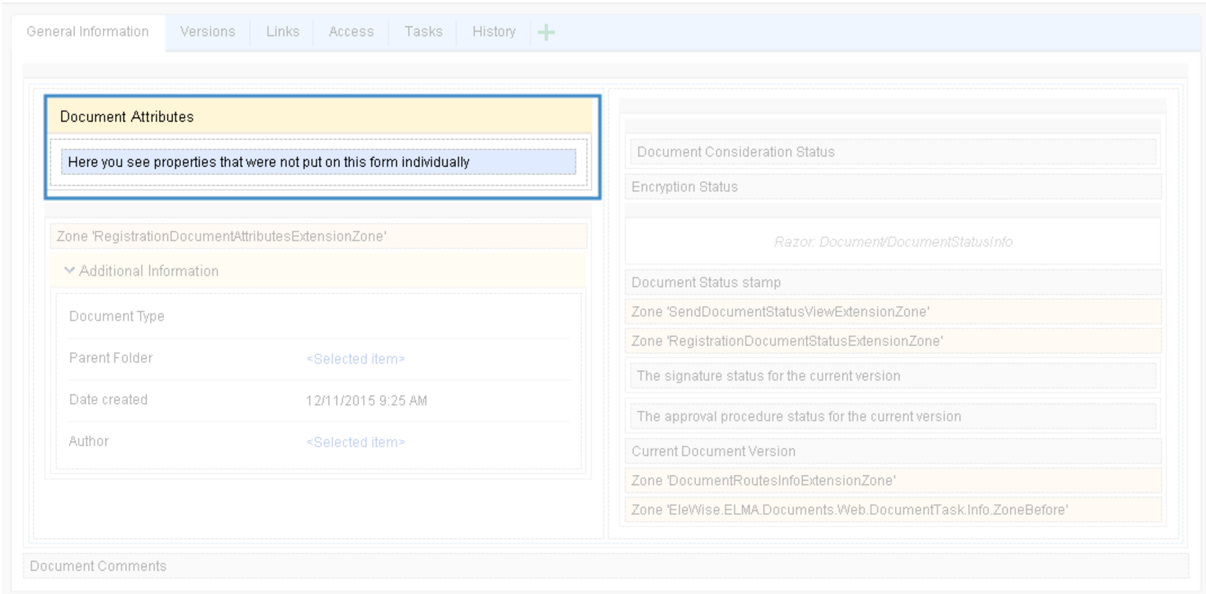


Fig. 19. Document Attributes panel. Default layout.

Clear this section and add the abovementioned properties. To add a property, drag it from the **Common Properties** panel to the **Document Attributes** panel (Fig. 20).

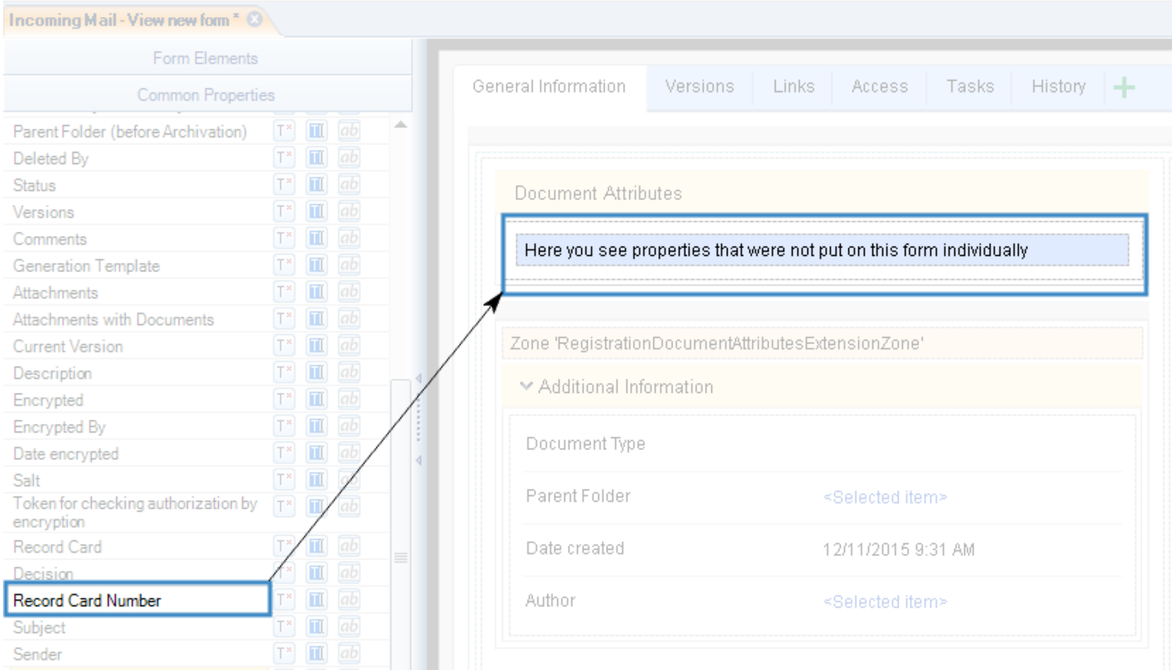


Fig. 20. Adding a property to the panel

3. Place the **RegistrationDocumentAttributesExtensionZone** zone into a collapsible panel: drag'n'drop the **Panel** element from the top toolbar, type in the name (**Document Registration)**, make it collapsible and minimized by default. For style, chose Yellow divider (Fig. 21).

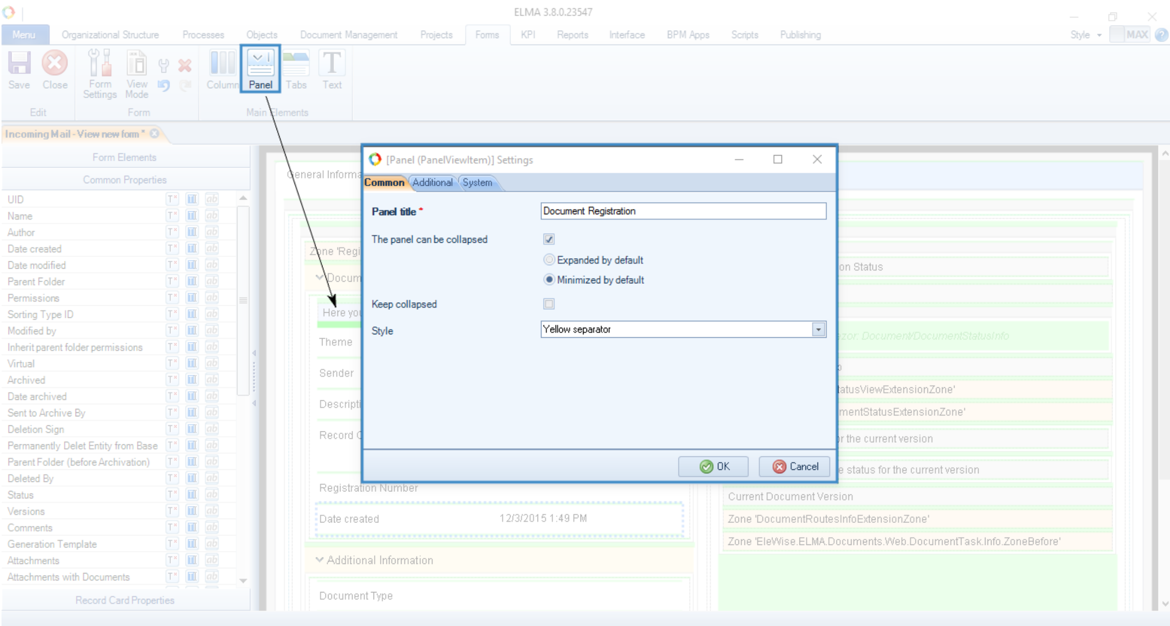


Fig. 21. Customizing a collapsible panel in the form

Then drag the **RegistrationDocumentAttributesExtensionZone** element to the panel (Fig. 22).

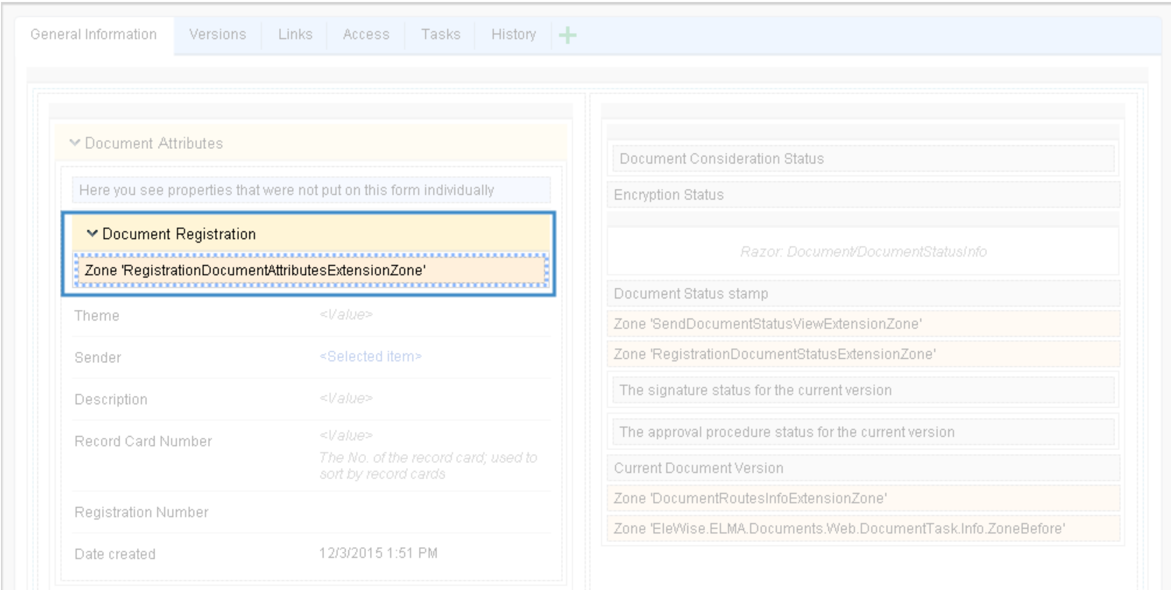


Fig. 22. Document Registration panel

4. Now add the **Preview** tab and place the **Preview of Current Document Version** element on it. To add a tab, click on the green cross icon located on the right side of the tabs (Fig. 23). In the provided settings window specify the tab's name. Click **OK** to save the settings.

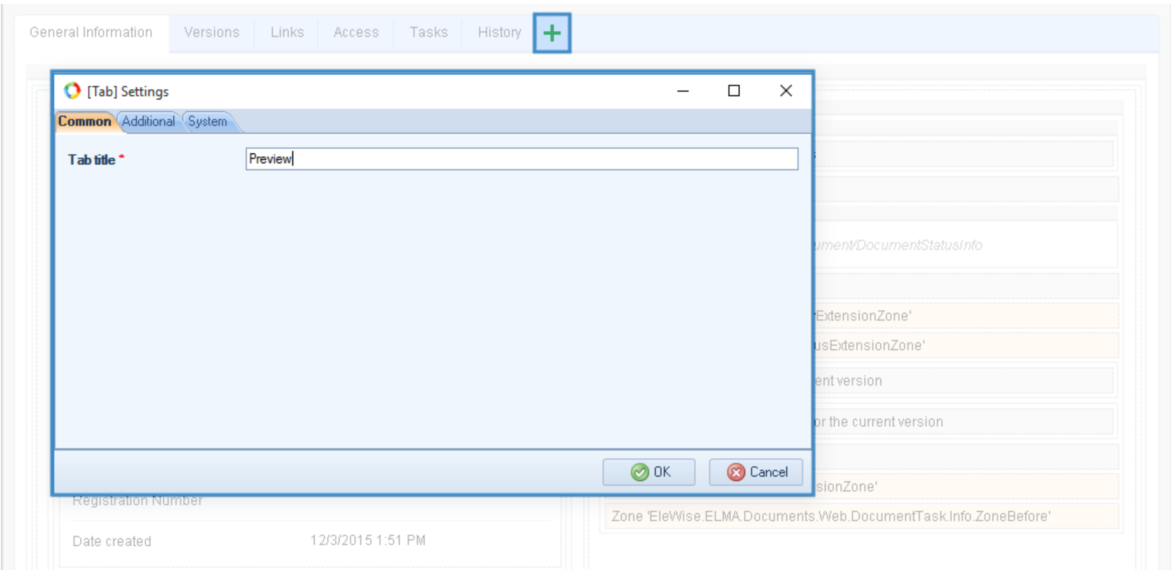


Fig. 23. Button for adding a new tab, and tab settings window

Once the tab is created, place it between **General Information** and **Versions**. Then add the **Preview of Current Document Version** form element from the left panel (Fig. 24).

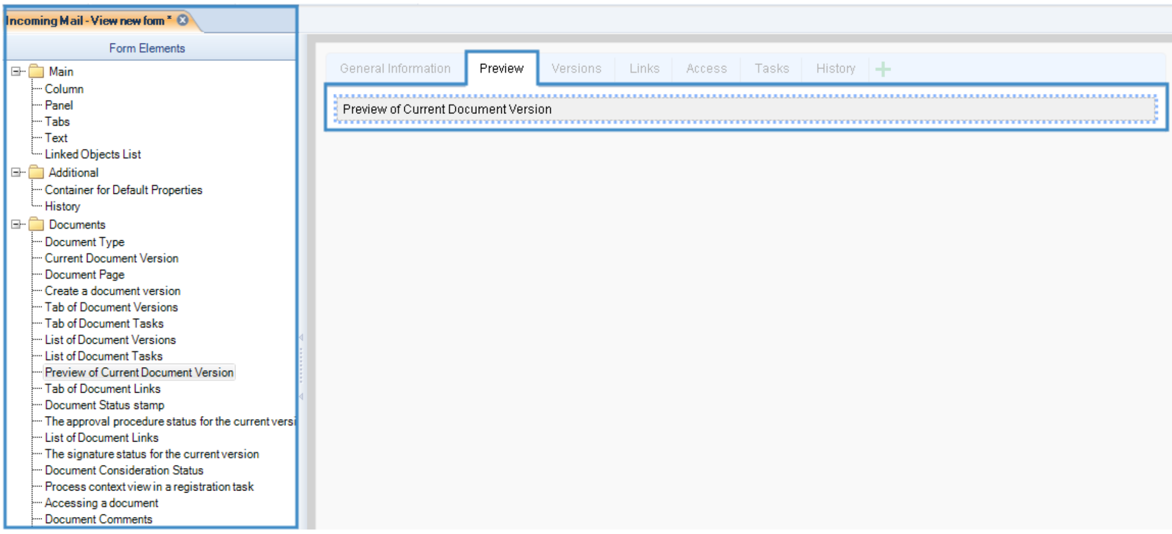


Fig. 24. The added Preview tab

5. Delete the **Versions** tab and place the list of versions in the **General Information** tab. To delete a tab, select its name and press Delete on your keyboard; or right-click on its name to open the context menu, and select **Delete**. Add the **List of Document Versions** form element to the form. Place it where you like (Fig. 25).

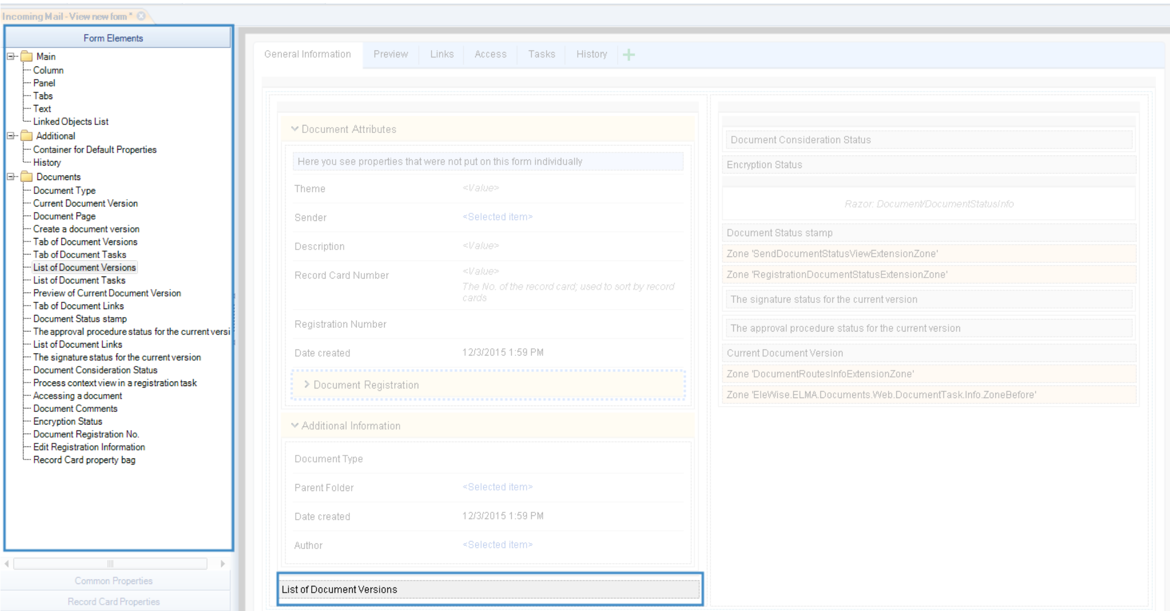


Fig. 25. Adding the "List of Document Versions" element.

Once all these changes are done, **ELMA Designer** will display the new document form as shown in Fig. 26.

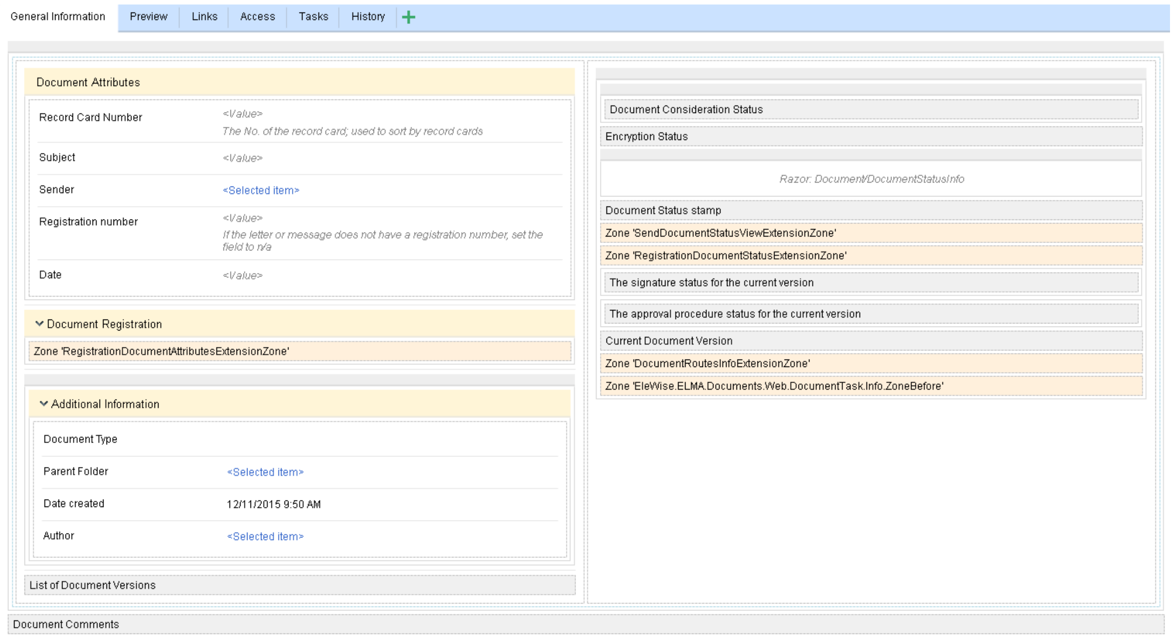


Fig. 26. New document form

Save the form after editing. Place it in the **Forms by Default** section of the **Forms (Views)** tab for displaying (Fig. 27).

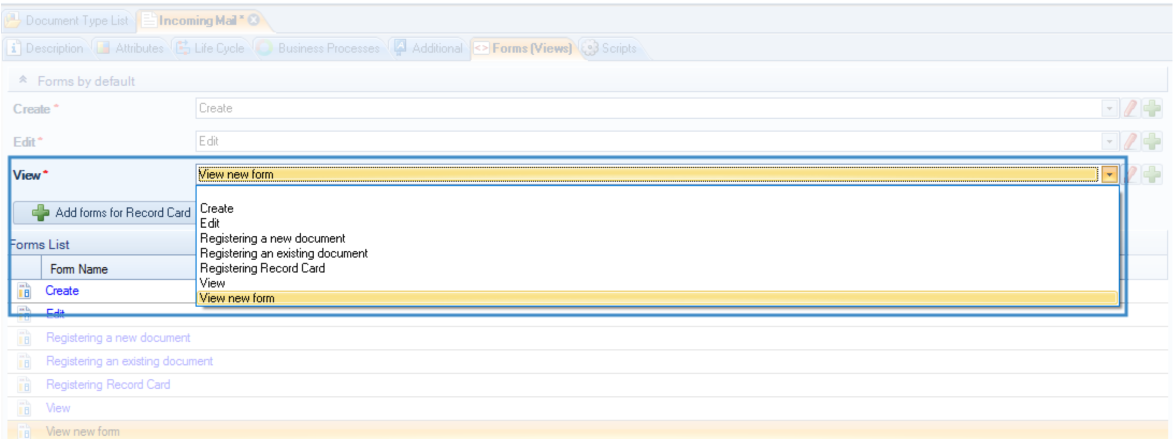


Fig. 27. Adding the new form to the Forms by Default section.

You can always change the document form back to the standard one, simply select it. If you have made changes to the standard form, you can restore it: select **Restore Original Form** in the context menu.

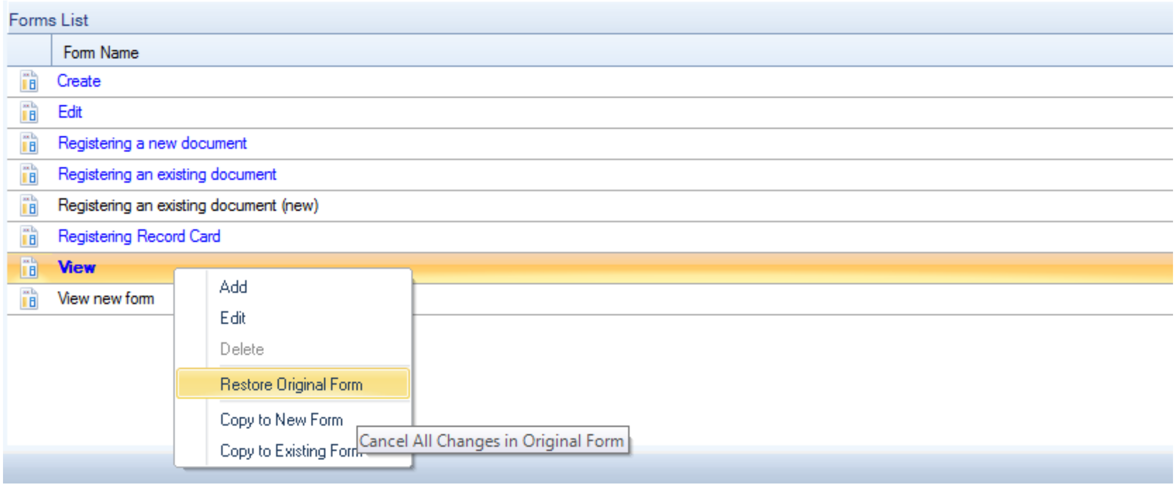


Fig. 28. Context menu of the document type form

For the modifications to become effective, save and publish the document type (section 3.1.4). If you have created a new document type or have modified the document properties, then after publishing you also need to restart the **ELMA server**.

3.1.3 Document Life Cycle

The **Document Life Cycle** is the sequence of a document's statuses (stages) from its creation to its eventual archival or destruction. The stages depend on the document type.

The lifecycle statuses can be changed manually or automatically, when the document is routed by the system. You can disable the status changing option in **ELMA Designer**. To do so, open the document type page and deselect **Use this lifecycle for this type of document** in the **Description** tab.

To manage document statuses in **ELMA**, you have to create the statuses and set the transitions between them. It is done in **ELMA Designer** in the document type page (Fig. 29).

If you do not want the users to change statuses manually in **Web Application**, then disable the **Allow to change statuses manually** option. In this case, the status will only be modified in the document's rute.

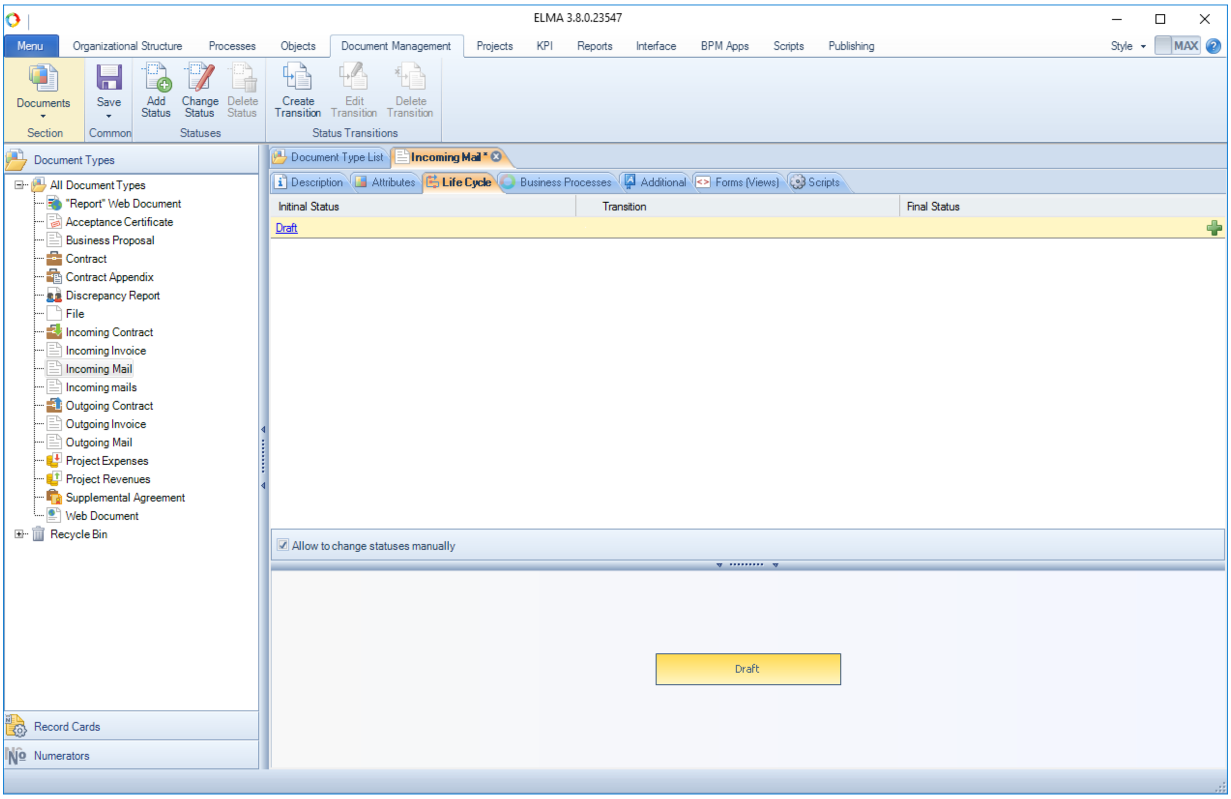


Fig. 29. Document type page, Life Cycle tab

To create a new status, click **Add status** in the top toolbar (Fig. 30). Click  in the window provided, and type the status name in the **Name** field. If you want, add a description in the **Description** field. Then click **OK** to create the status or click **Cancel** to cancel it.

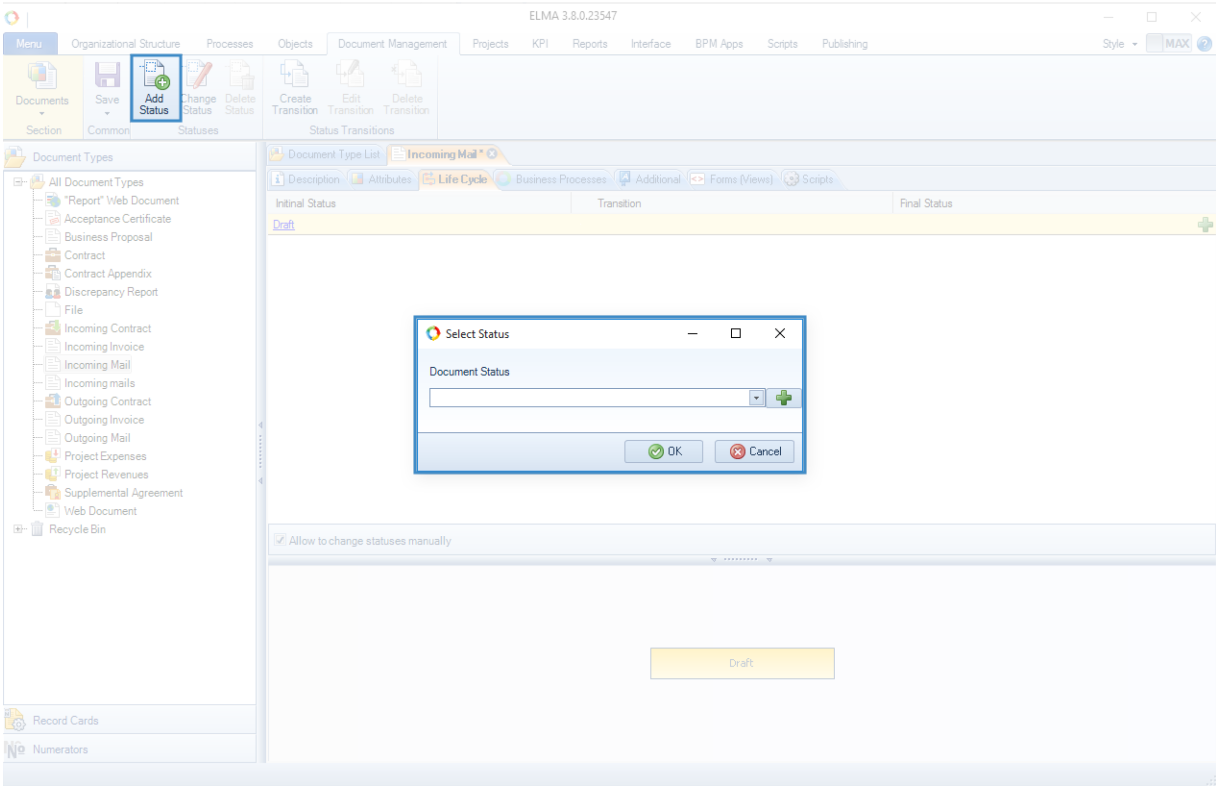


Fig. 30. Creación de un estatus de ciclo de vida

Asigne los siguientes estatus para el tipo de documento **Correo Entrante**:

1. **Borrador** - El documento se crea en el sistema (es un estatus predeterminado).
2. **Registro** - El documento se envía para el registro.
3. **Pendiente de consideración** - El documento registrado se envía para consideración.
4. **Activo** - Las tareas se establecen basándose en el documento.
5. **Ejecutado** - Todas las tareas basadas en documentos dentro de la ruta se han completado.
6. **En Archivo** - El documento está desatualizado y se envía al archivo

Ahora cree los estatus en **ELMA Designer** (Fig. 31).

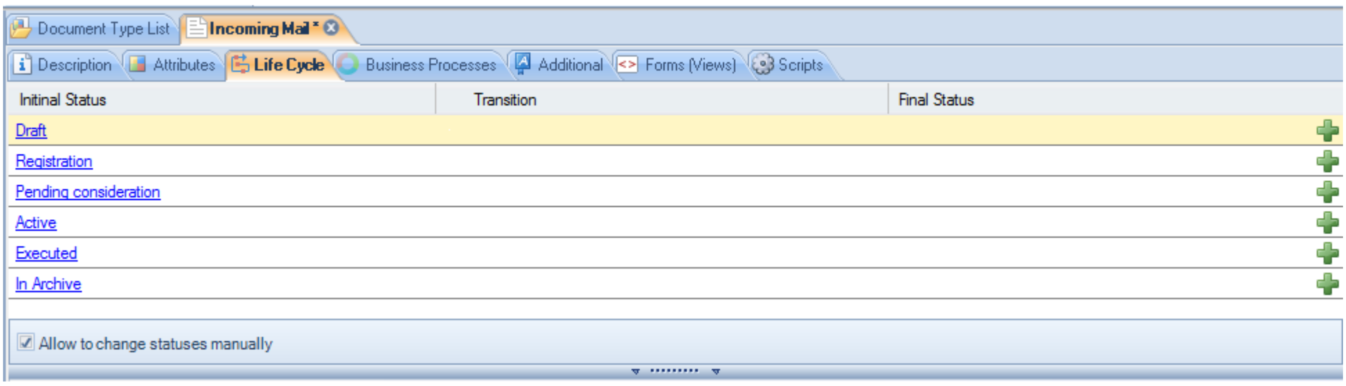


Fig. 31. Life cycle statuses for Incoming Mail

For the statuses to change only in a certain order, you need to set up transitions between them. It is especially important for manual status updating. To create a transition, click **Create Transition** in the top toolbar; or use the  button in the status field (Fig. 32).

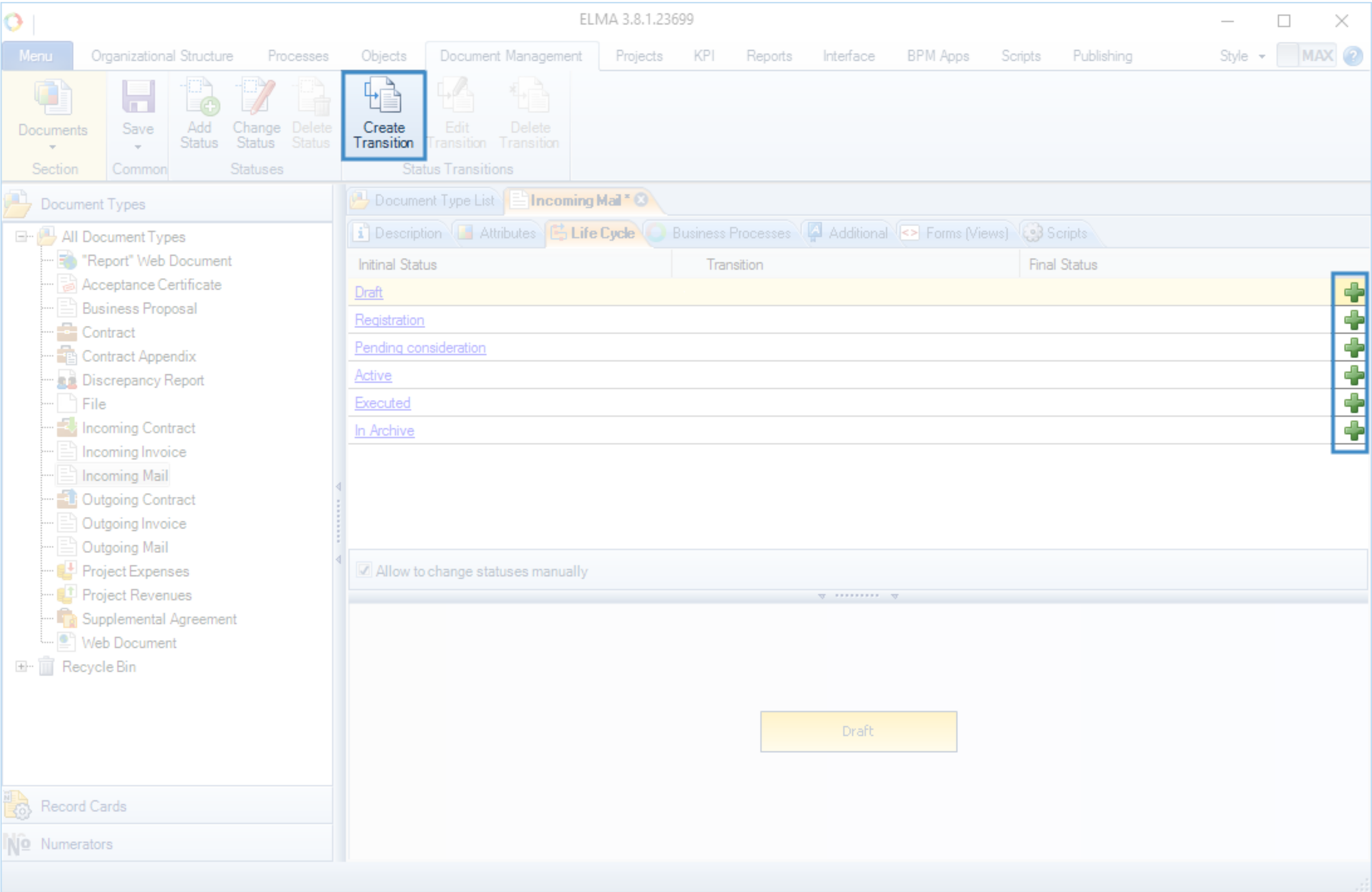


Fig. 32. Status creation buttons

In the provided window, enter the transition's name and the initial and final statuses (Fig. 33). Select the statuses from the list of statuses available in the system.

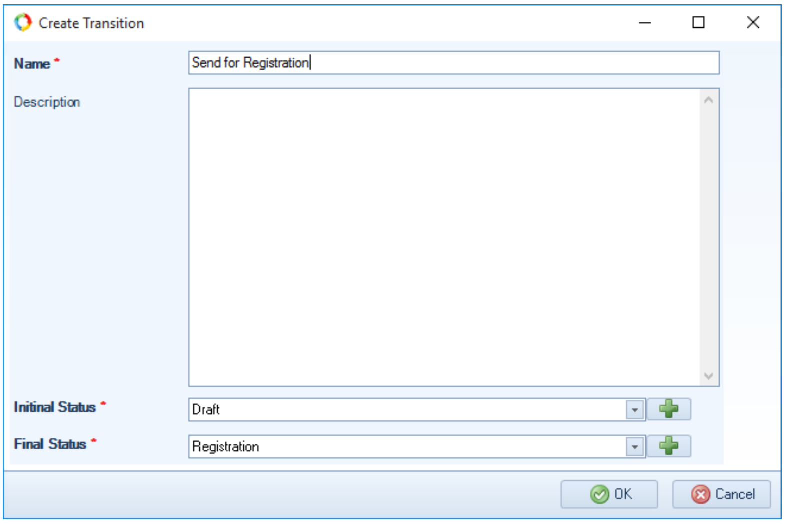


Fig. 33. "Create Transition" window

Create transitions for the **Incoming Mail** document type, as shown in Fig. 34. One status can have several transitions. For example, a newly created document can be sent for registration or, if it was created by mistake, to the archive. You can modify or delete life cycle statuses and transitions. Once all the changes are done, save and publish the document type (section 3.1.4).

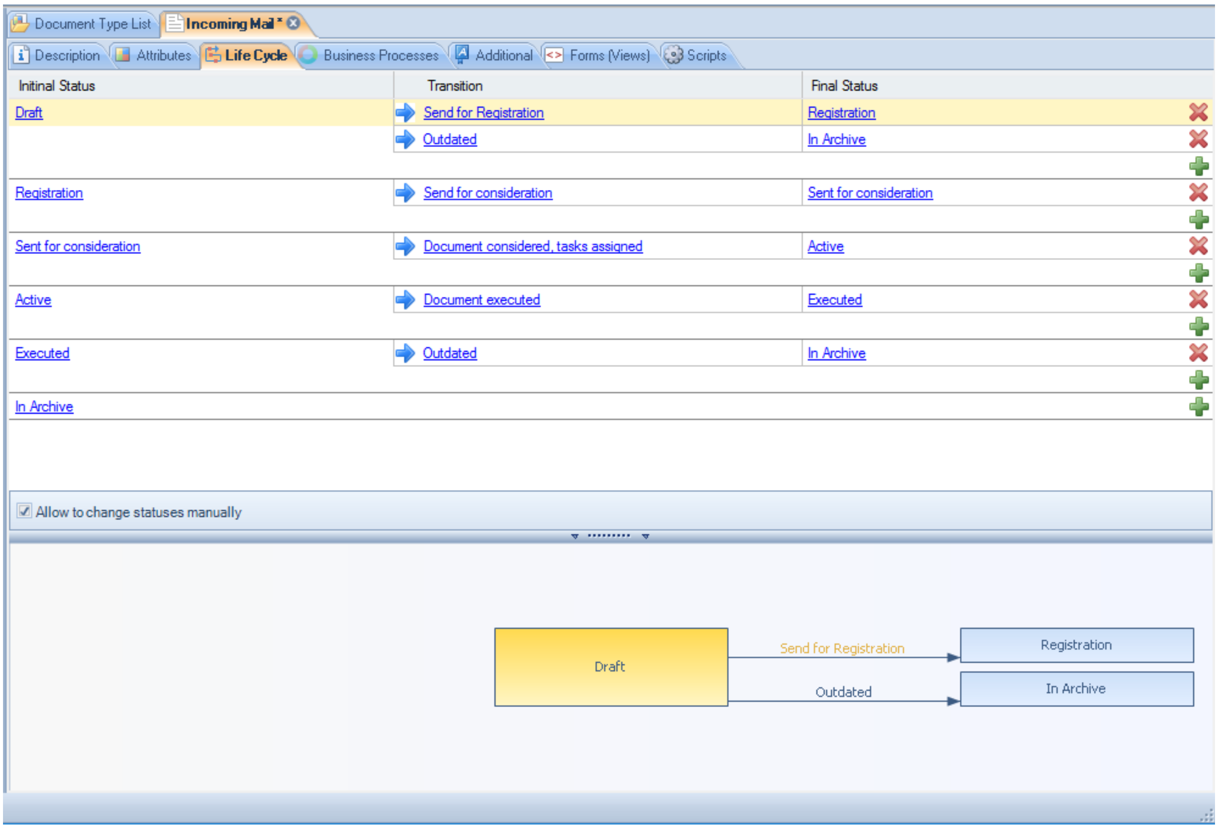


Fig. 34. Document Life Cycle

Once the life cycle is configured and published, and the **Allow to change statuses manually** option is enabled in **Web Application**, you can manage the document statuses (Fig. 35). The **Install** button then appears in the document status section. It opens a window where you can select a new status. A user who has access to all the documents can update statuses in any order regardless of transitions. All the other users can update statuses according to their transitions only.

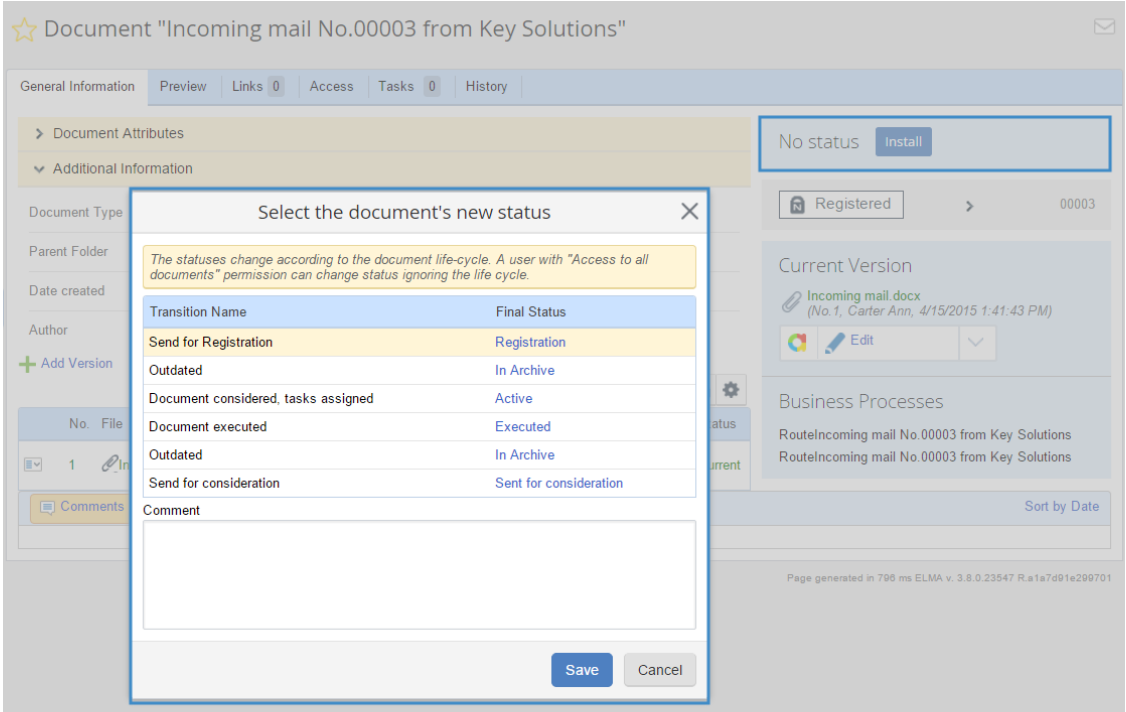


Fig. 35. Changing document status manually

3.1.4 Document Type Publication

To make all the changes available in **Web Application**, you have to publish the saved document type and restart the **ELMA server**. Only the changes made to the document type forms do not require to restart the server.

To publish a document type, click **Publish** in the drop-down menu of the **Save** button, on the document type page (Fig. 36).

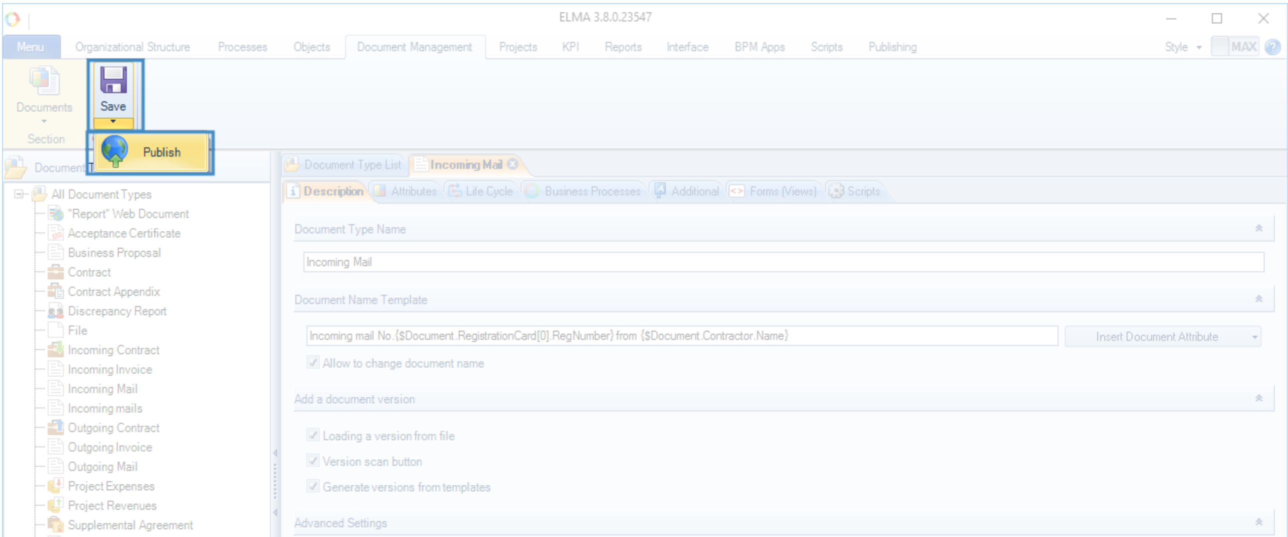


Fig. 36. Publish button on the toolbar of the document type page

Publishing will take a while. In the **Publish** tab of **ELMA Designer**, you can publish several document types at once (for more details, see **ELMA Help**).

After publishing, restart the **ELMA server** if needed. To do so, go to the **Publishing** tab. If restarting is needed, the tab will show a due notification. Click **Restart Server** (Fig. 37). All the objects that require the server to be restarted are specified in the **Server restart is required** field of respective sections. To see a list of these object, click on the number specified in the field.

After you publish the document type and restart the **ELMA server**, the new document type becomes available in **Web Application**.

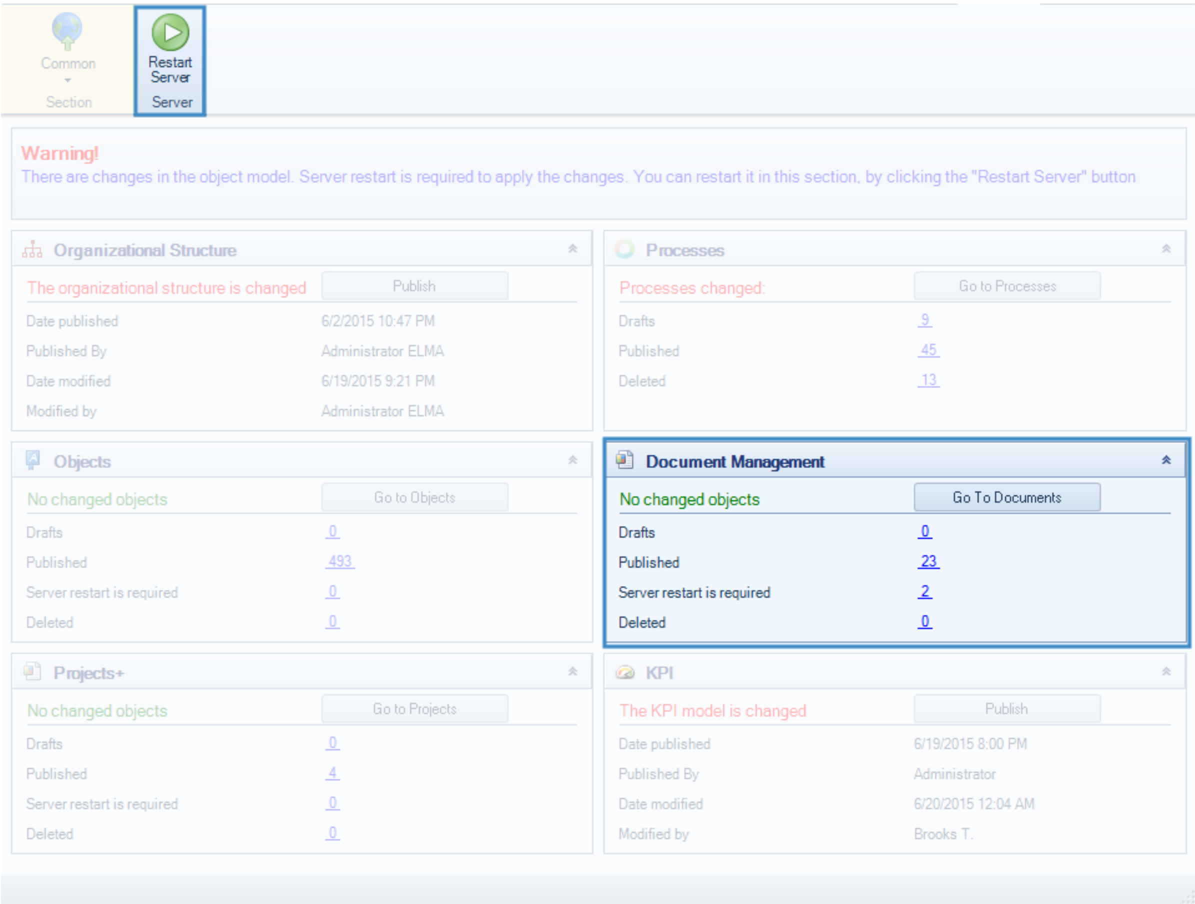


Fig. 37 Publishing tab. Document Management section.

3.2 Document Creation

This section explains how to create a document in **ELMA Web Application**. In **Web Application** you can create documents of different document types, both the standard ones included in **ELMA** and the ones created in **ELMA Designer** (once they are published and the server is restated).

The **Create Document** buttons are by default placed in several locations of **ELMA Web Application**:

- The main page toolbar (Fig. 38);
- The main menu;
- The **Document Management** portlet of the **Document** section;
- The dashboard of any folder in the **Document** section.

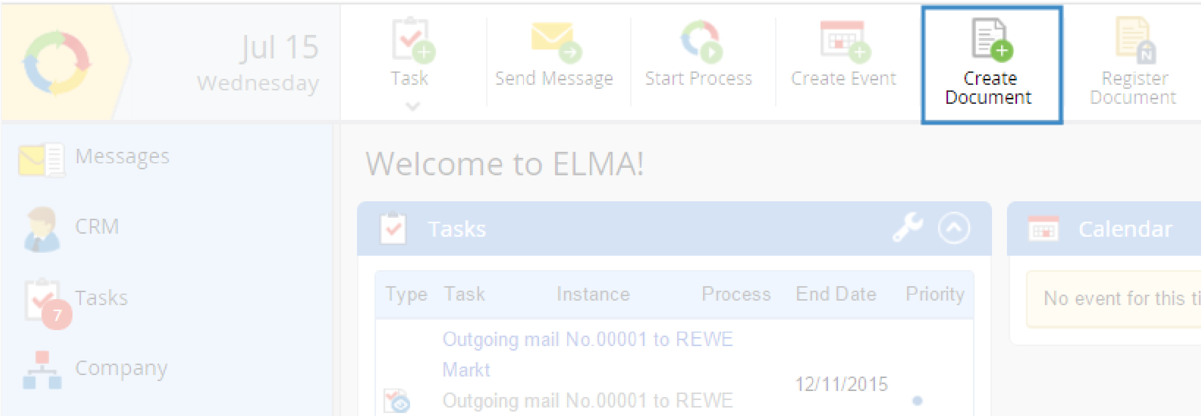


Fig. 38. Main page, Create Document button.

When customizing the interface, you can delete these buttons or place them differently.

When you click **Create Document**, a pop-up window appears for you to select the document type (Fig. 39). To make it easier, the recently used document types are listed separately. In Fig. 39, the recently used document types are **Outgoing Mail**, **Web Document** and **File**).

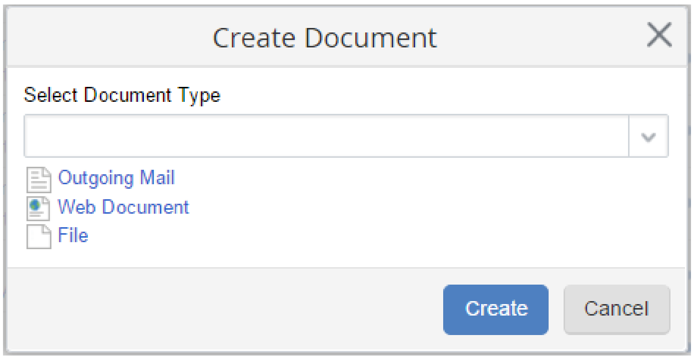


Fig. 39. "Select Document Type" window.

Select the document type and click **Create**. The creation form for the selected document type will open. Fill in the document properties previously created in **ELMA Designer** and attach a new document version.

Fig. 40 shows a standard creation form for **Incoming Mail**. In the top section you can see all the document type properties added in **ELMA Designer**. They can either be required fields or not (specify it in **ELMA Designer** in the document type attributes, or when customizing document forms).

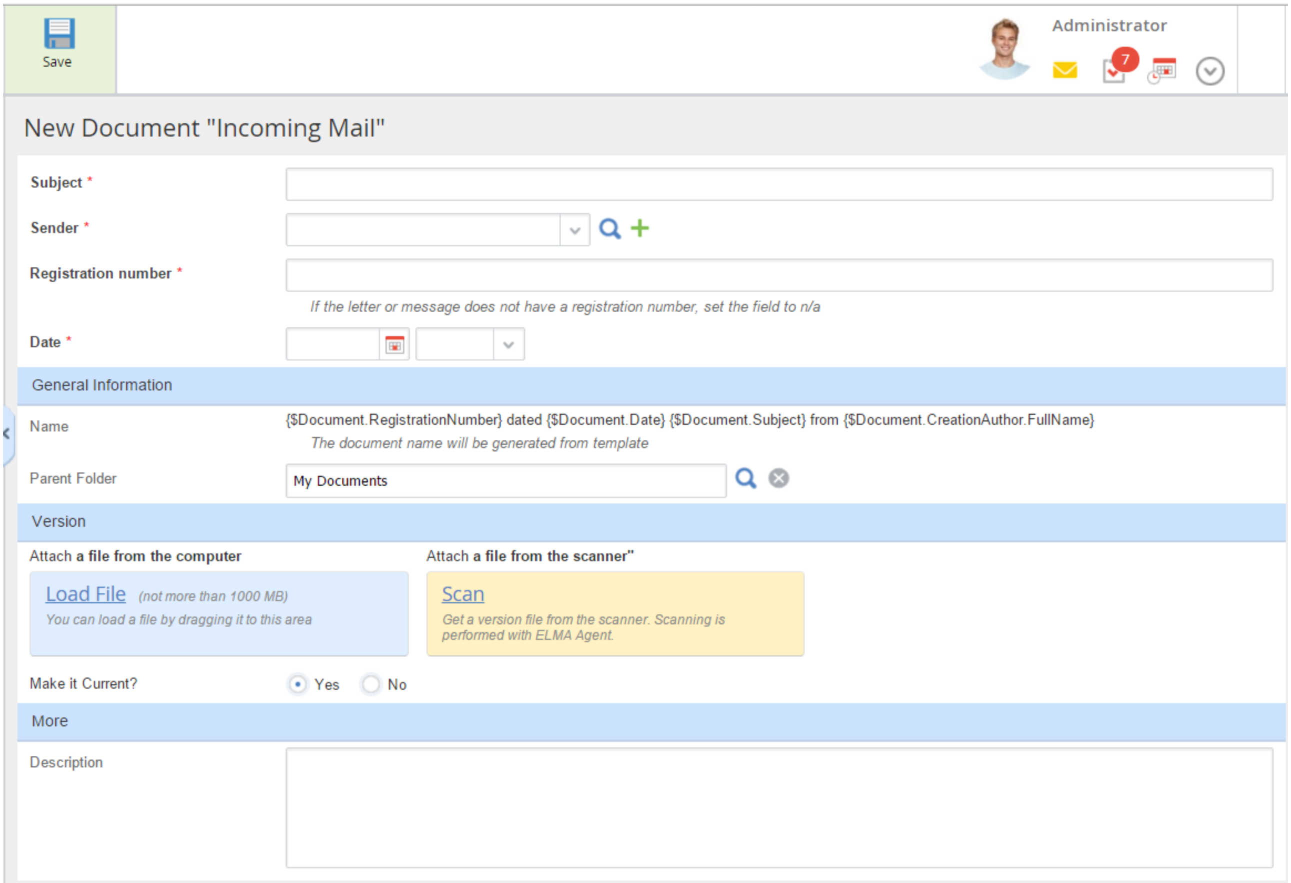


Fig. 40. Document creation form for Incoming Mail

In the **General Information** section you can select a folder for your document and enter a name. Previously, **in ELMA Designer**, you prohibited to change the document name and configured a name template instead. Therefore, you cannot edit the document name now. The document will be named automatically when created.

Parent folder is the folder where the document is stored in **Web Application**. You can change it. The default parent folder is **My Documents**, meaning that all the document created by a user are automatically put in the user's own folder. To avoid that, it is best to setup a specific folder for each document type (see section 3.4).

The **Version** section requires you to attach a document version. In case of **Incoming Mail**, you can attach a file either from your computer or from a scanner. In the **Make it**

current? field select **Yes** (and save the new version as current) or **No** (and save the new version as a draft).

Adding a version is not compulsory, because the document page can be filled in without it. You can modify these settings in the document creation form in **ELMA Designer**.

In the **More** section you can add a brief description of the document.

As we have mentioned, this creation form is a standard one. You can change it in the **Form Builder** by listing attributes and sections in whichever order you want. However, make sure that the form features a section for adding document versions.

After filling in all the information, click **Save** in the top toolbar. Once the changes are saved, the system creates a document page, making the document available for work.

3.2.1 Document Page

The document page displays all the information about the current document. Depending on the document type, its properties may vary.

The document page is displayed right after the document is created and saved. You can also open it from the folder that contains the document. Links to the page can be placed in any tasks or pages of other system objects.

Take a look at a standard document page (Fig. 41) with a document form that has not been modified.

Next to the document's name there are two icons. Use them to quickly add the document to Favorites ( ) and subscribe to any modifications made to the document ( ).

A standard document page displays all the information about the document, arranged by sections and stored in tabs.

The **General Information** tab features:

- **Document Attributes** and **Additional Information** sections. They are filled in at creation stage;
- Information about the document's registration, if it is registered;
- **Document Status** section, displaying information about the current document status and allowing to change the status according to the document's lifecycle;
- The approval section, if the document has been sent for approval;
- The decision section, if the document has been sent for consideration;
- **Current Version** section, allowing to download the current document version and manage it through **ELMA Agent**;
- **Current tasks** collapsed panel (if a document-based task has been assigned);
- Document history panel, similar to the **History** tab.

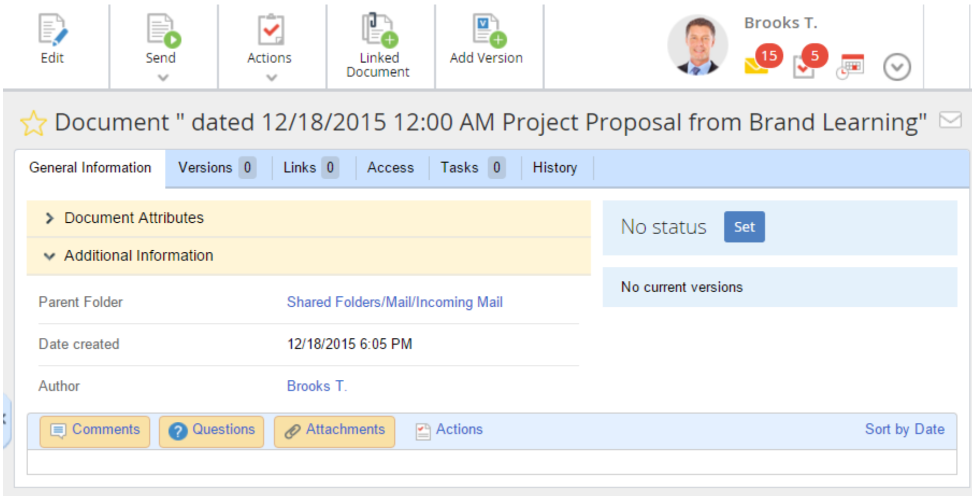


Fig. 41. Electronic document page in ELMA Web Application

Some fields are represented as hyperlinks, since that information belongs to an entity or a folder. When you click on such a field, **ELMA** opens a corresponding page.

The **Versions** tab contains all the versions of the document. It shows the status, author and date of each version. In this tab, you can add a new version or view, edit and change statuses of versions attached (Fig. 42).

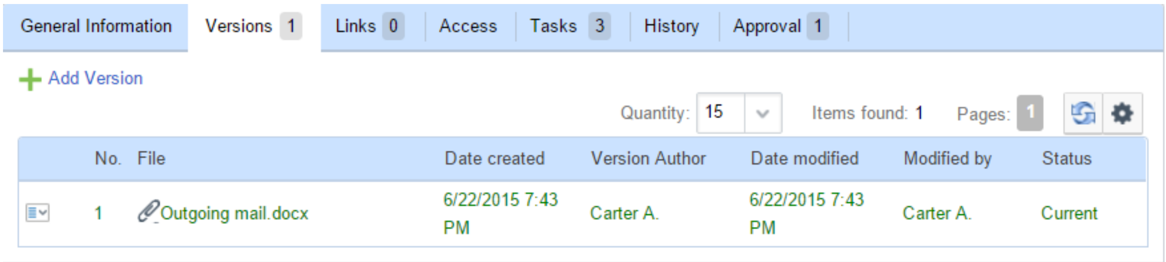


Fig. 42. Document page. Versions tab.

The **Links** tab shows all the documents linked to the current document. You can add new links, which are then displayed both in the current document and the linked document (Fig. 43).

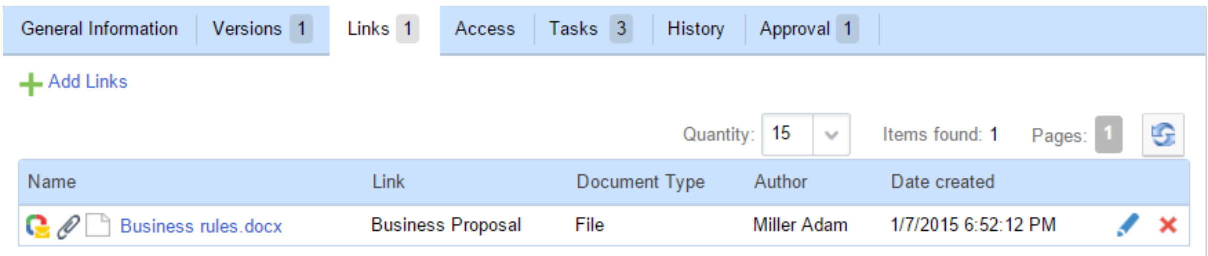


Fig. 43. Document page. Links tab.

The **Access** tab contains two tables, **Parent Folder Permissions** and **Extra Permissions**. They list all the users who have access to the current document (Fig. 44).

Those users who have **Full Access** or **Manage Permissions** access level, can set access permission for other **ELMA** users. For more information about levels of access and document access permissions see section 3.4.3

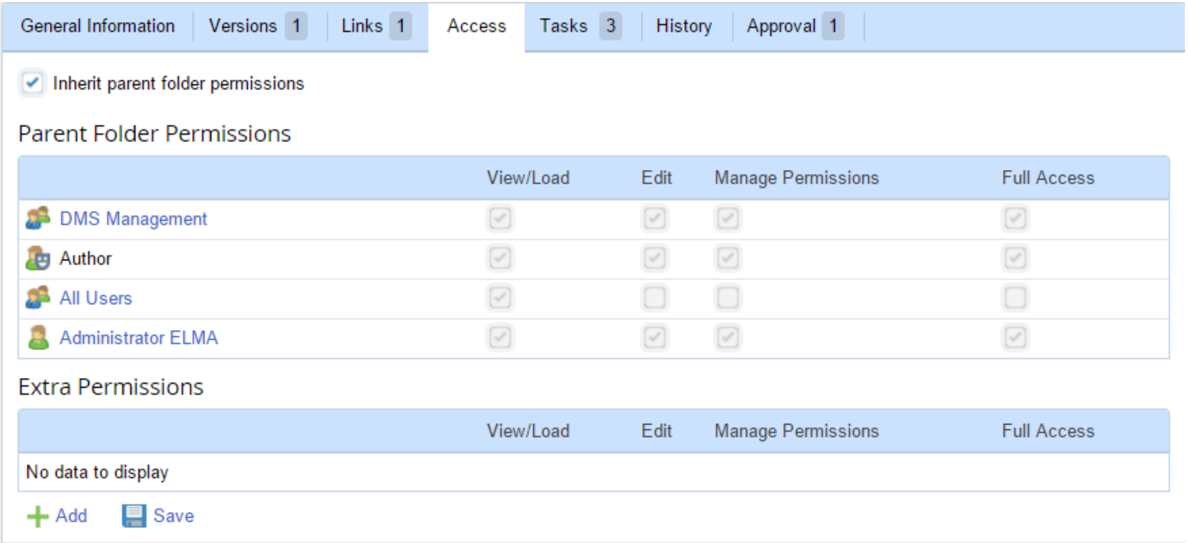


Fig. 44. Document page. Access tab.

The **Tasks** tab contains any tasks related to the current document. It displays information about all the document-based tasks (Fig. 45). The tab header shows the total number of tasks related to the current document.

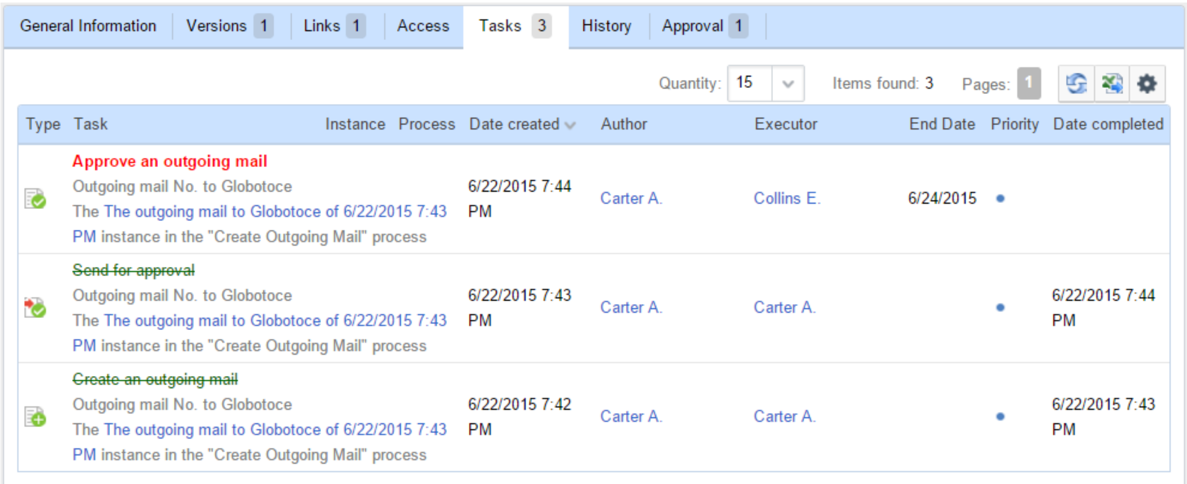


Fig. 45. Document page. Tasks tab.

The **History** tab lists all the actions performed with the document since the moment it was created in the system (Fig. 46).

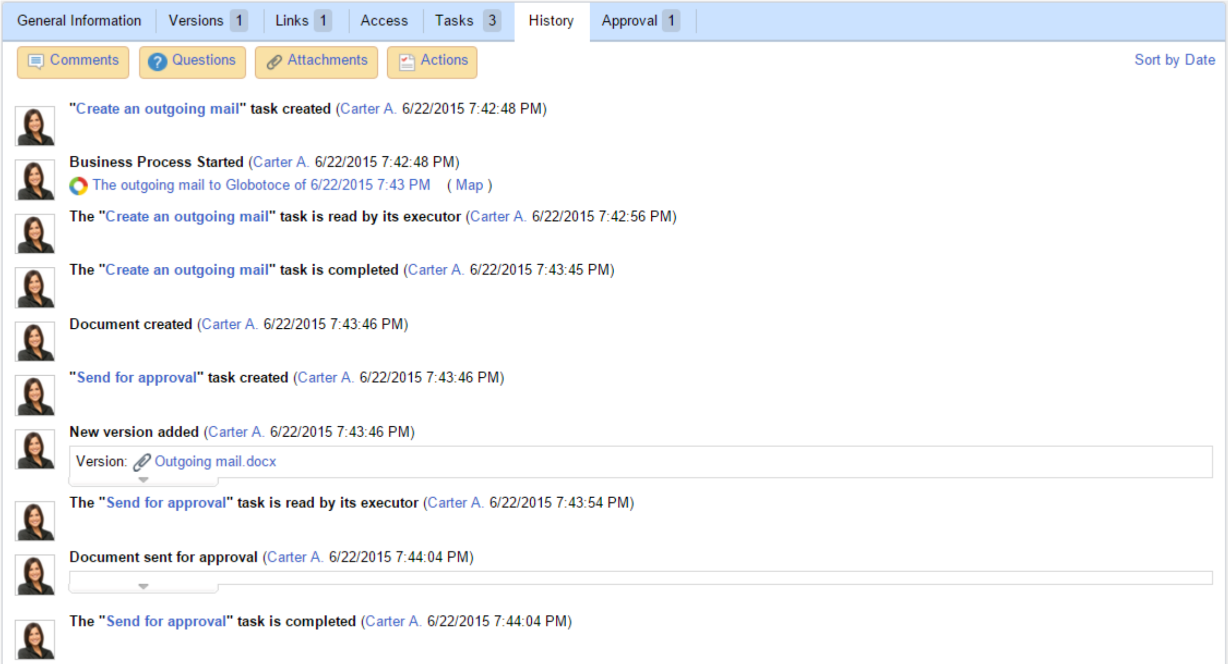


Fig. 46. Document page. History tab

If the document is pending approval or acquaintance, the page will feature corresponding tabs. They show information about any approvals or acquaintances that the document has been through, its statuses and comments. The number in the tab header is the number of approval/acquaintance sheets. Usually, every time a document is sent for approval or acquaintance, a new sheet is created.

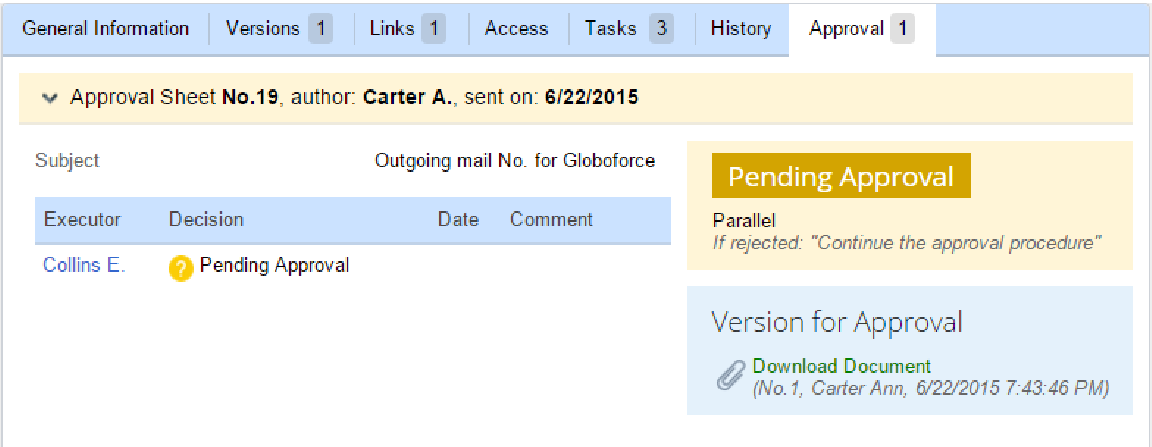


Fig. 47. Document page. Approval tab

If a document is sent for consideration, then the **Consideration** tab appears (Fig. 48). It contains information about the decision made on the document, and shows the document's progress. Only a registered document can be sent for consideration.

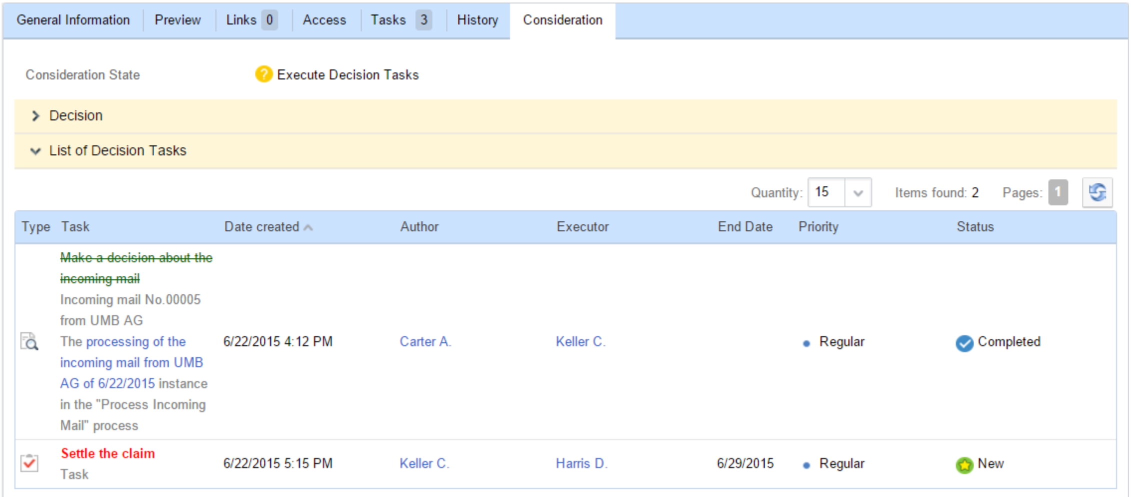


Fig. 48. Document page. Consideration tab

In section 3.1.2 you learned to modify the document forms. Fig. 49 provides an example of a modified document page. When modifying how a document page is displayed, consider the ease of use, put important information first and get rid of excessive information.

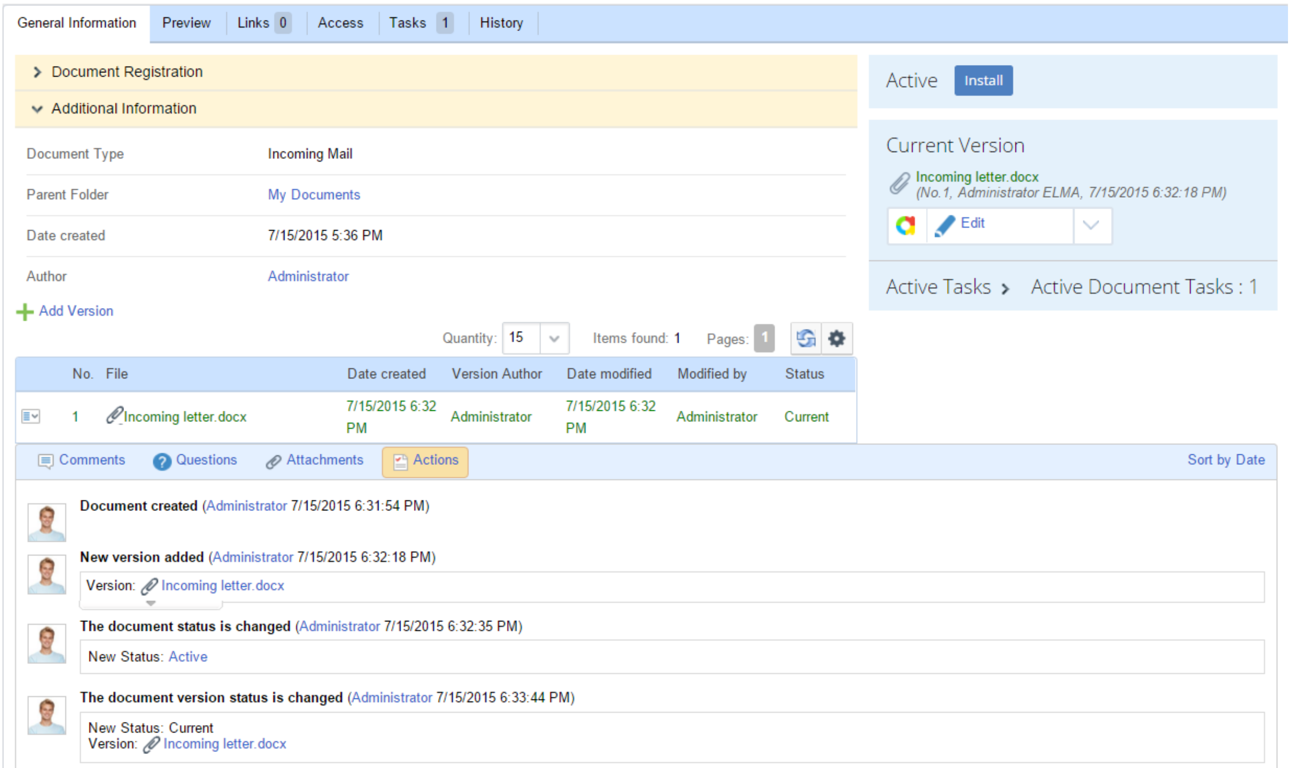


Fig. 49. Modified document page

In the **Preview** tab added to the document page, you can view the document without downloading the version to your computer.

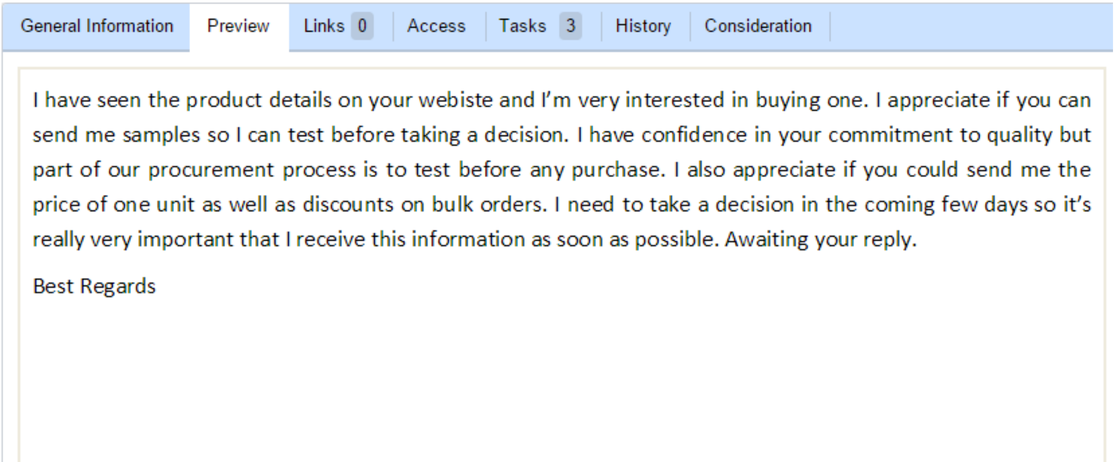


Fig. 50. Document page. Preview tab.

Each document page features a toolbar with controls for document handling (Fig. 51).

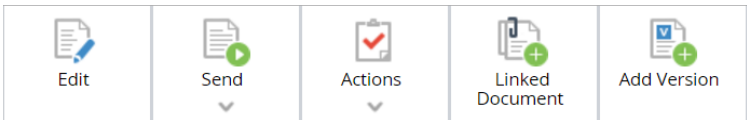


Fig. 51. Document page toolbar.

With the **Edit** button you can edit the document page and is only accessible to those users whose level of access is **Edit** or higher.

With the **Send** you can send a document for acquaintance, discussion, registration, consideration (for registered documents only) and create a task based on the current document. The **Actions** functional button provides other functions, too. For more information see **ELMA Help**.

The set of available actions varies for each user depending on their access permissions.

3.2.2 Document Versions

A **Document Version** contains a file and provides information about the document (creation or modification date, author) and its status.

The document versions are managed in the **Versions** tab of the document page. To the right of the tab header, you can see the number of the document's versions (Fig. 52, Fig. 42).

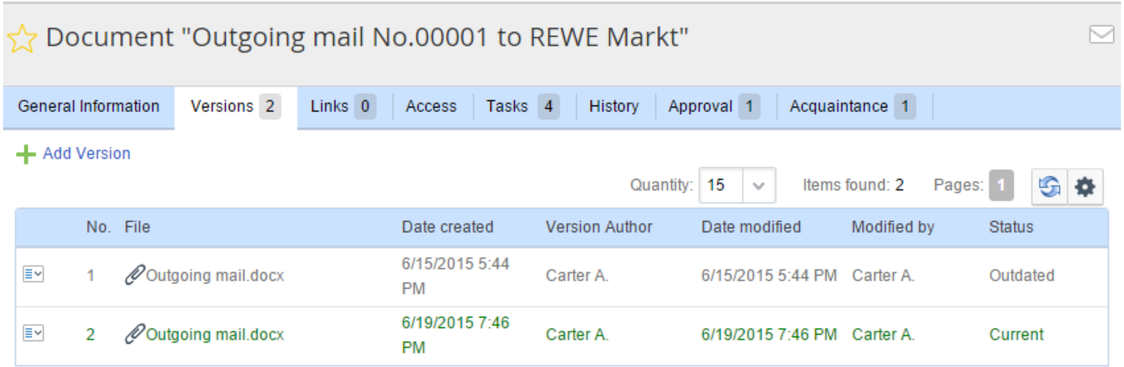


Fig. 52. Document tab. Versions tab.

The status of each document version is color-marked in the table.

There are three basic statuses of a document version:

- **Current** – Version which is current for the moment. It is displayed in the **General Information** tab of the document page and is also available for download from the list of versions. To download it, click the icon. To update the selected version of the document and make it current, check the corresponding checkbox;
- **Draft** – Document version under review or not marked as current;
- **Outdated** – Outdated document version.

Apart from the statuses, a version can be **Locked.** It is recommended to lock the versions that are being edited. To lock a version, click **Lock** in the context menu located to the left of the version's name. Or, you can do it through **ELMA Agent** by clicking **Lock** and **Change** in the current version's context menu. To unlock the version, click **Unlock**.

A version's context menu features following controls (Fig. 53):

- **Export** – Download the version to the user's computer;
- **Lock** – Lock the version so that other users cannot modify it;
- **Change Version** – upload a new document file without creating a new version (replace version files);
- **Change Status** – Change the **Current/Outdated** status;

- **ELMA Agent** – List of actions available in **ELMA Agent**. The **ELMA Agent** functions are thoroughly described in the **ELMA BPM Platform** quick-start manual.

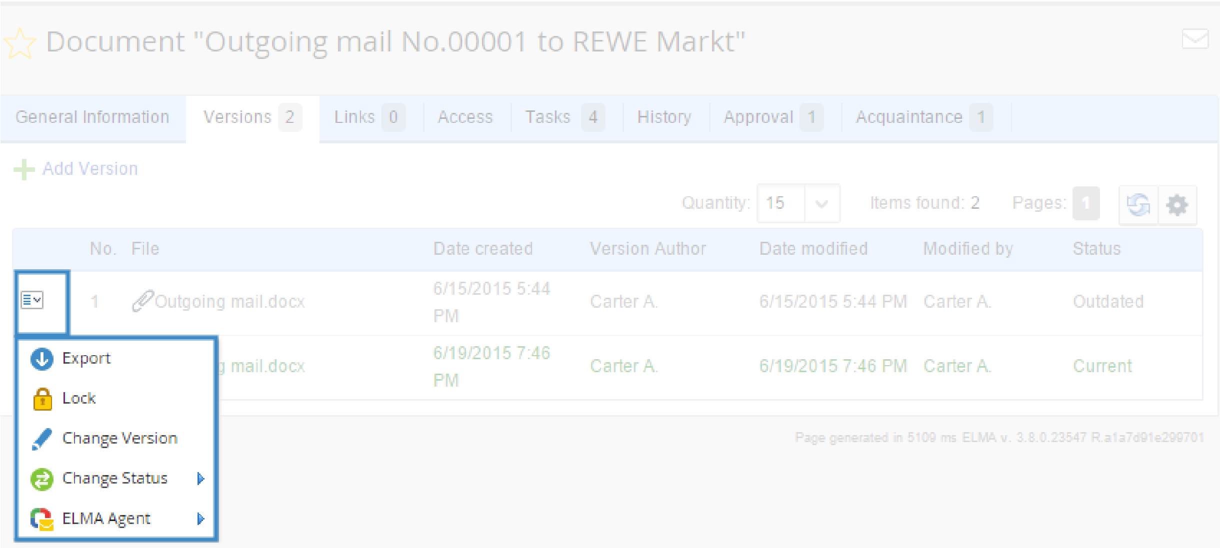


Fig. 53. Context menu of a document version.

Version can be added either manually by users (in the document's page) or automatically in the document's route (with scripts).

3.3 Document Registration

To register a document means to create a Record Card and assigning a registration number to a document.

Registration confirms that the document was created or received, by means of adding it to the registration form, assigning a number and adding information about the document. Registration makes a document legally valid.

To organize document registration in **ELMA ECM+**, you have to configure how documents are registered within your company:

1. Create and customize all the necessary Record Card types in **ELMA Designer**. By default there are four basic Record Card types in **ELMA**: *Incoming*, *Outgoing*, *Internal* and *Contracts*;
2. Create, customize and publish the Records Classification Scheme in **ELMA Web Application**;
3. Customize the Record Cards in **ELMA Web Application**.

To make it easier, you can also customize registration variants.

Read the following sections for more information of document registration.

3.3.1 Customizing Record Card

A **Record Card** contains a set of attributes (fields) that show registration details, assigned to a document when it is registered: registration number, registration office, file, etc.

There are four basic Record Card types in **ELMA**: *Incoming*, *Outgoing*, *Internal* and *Contracts*.

The Record Card types are managed in **ELMA Designer**, in the **Document Management** tab of the **Record Card** section (Fig. 54).

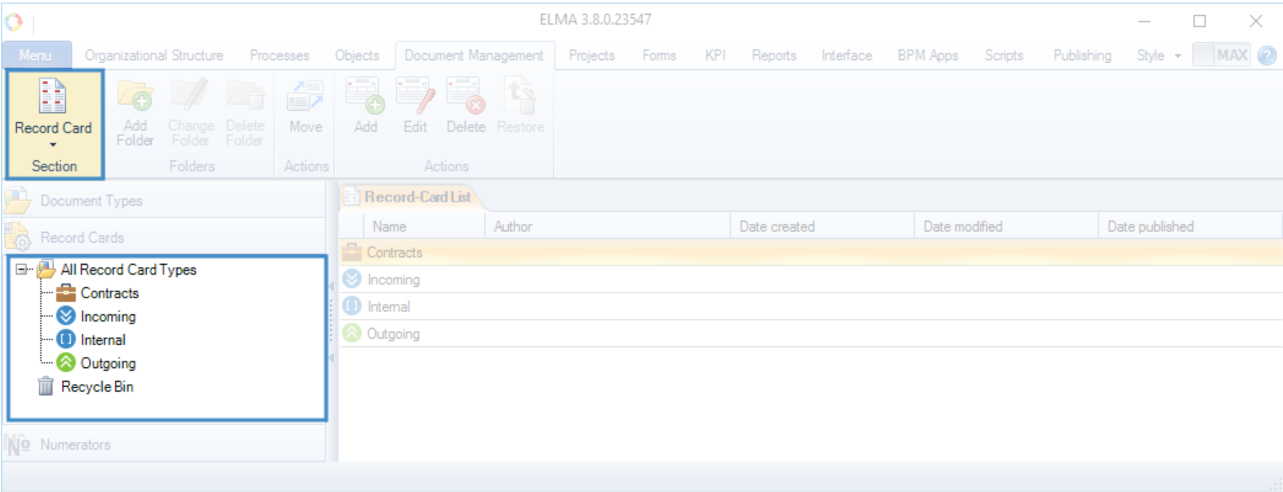


Fig. 54. ELMA Designer, Document Management tab in Record Card mode

The Record Card types are managed similarly to the document types, except that the **Form Builder** is not available for editing Record Cards Forms.

Usually you do not need to set up Record Card types and can use the default settings.

You can set up a Record Card type by adding attributes and registration instructions for a document. These attributes are created like the document type attributes. They are filled in during registration, and are displayed in the Record Card once the document is registered.

Now add an instruction for the Incoming document flow.

First, you have to create the instruction in **ELMA Web Application**. Click **Create document** on the main page (Fig. 38) and select the document type, **Web-document.** Add the instruction text, save the document and give permissions to **View/Download** the document to **All Users**.

Then, in **ELMA Designer** go to the **Record Card** section, open the **Incoming** type and select **Show help for registration from a document** in the **Description** tab. Enter the created web-document's ID in the **Document ID** field (Fig. 55). You can find the document's ID in your browser's address bar on the document's page (Fig. 56).

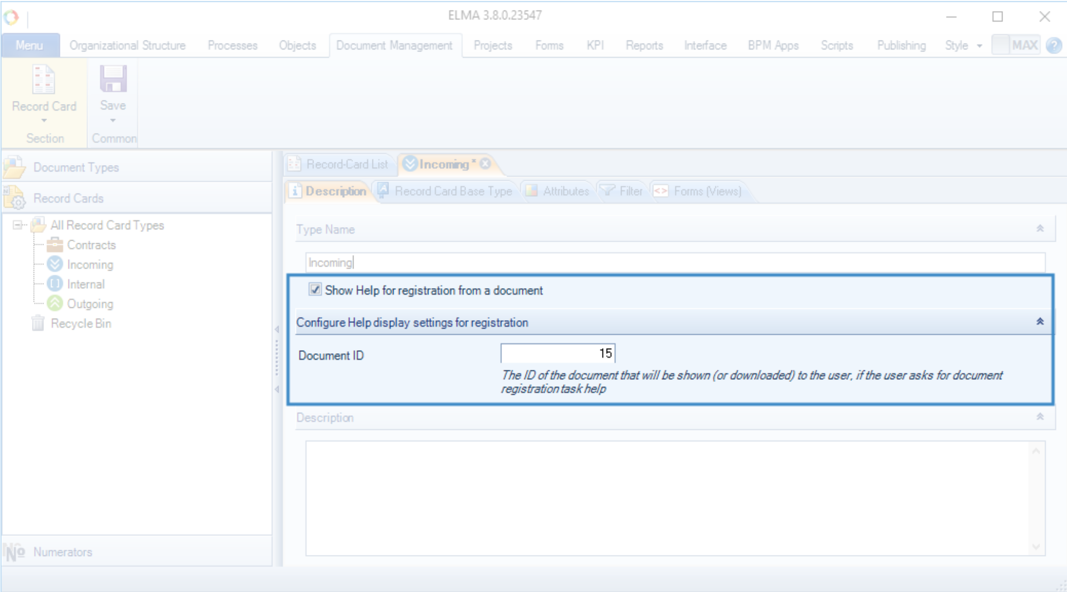


Fig. 55. Record Card. Description tab. Settings

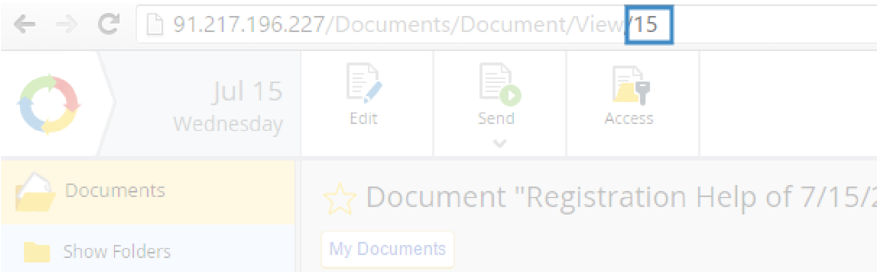


Fig. 56. Document's ID

When the Record Card type is saved and published, the  button will be available for users in the **Web Application,** when rehestering a document. This button provides instructions for document registration (Fig. 57).

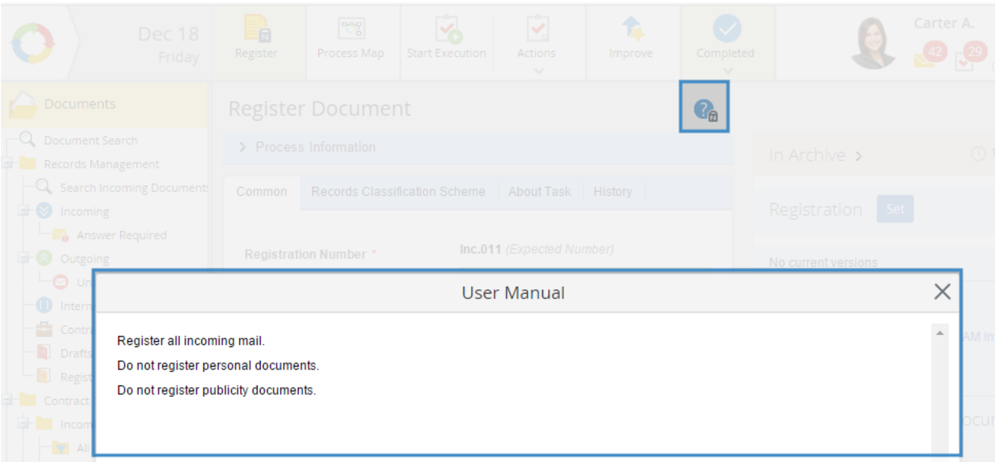


Fig. 57. Registration help button and the document that it opens

3.3.2 Customizing Record Card Form

Having customized the Record Card types you need to customize the Record Card form. In the form, users can specify the Record Card type, document flow and registration/edit forms that are used to register documents of the same type.

Let's modify the standard form for registration of an existing document, of the **Incoming Mail** document type. Copy the standard **Registering an Existing Document** form. Title the new form as **Registration of an Existing Document (new)** and then customize it (for more detail on form customization, see section **3.1.2**): add **Incoming Number** and **Date** properties in the **Registration number** panel of the **Common** tab (Fig. 58).

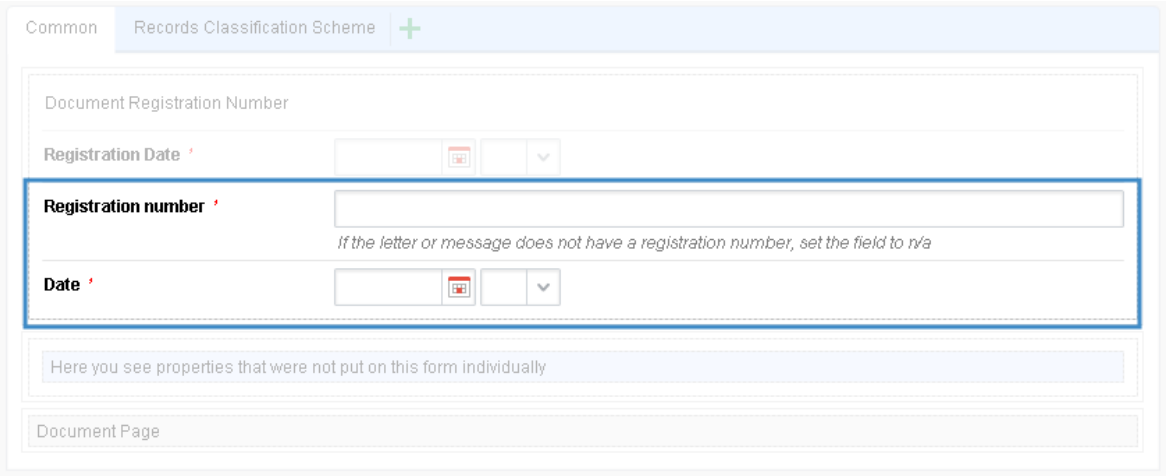


Fig. 58. Properties added to the form

Delete the section displaying all the document attributes (Fig. 19).

Save the form after editing. Click **Add forms for Record Card** in the document type page, in the **Forms (Views)** tab. In the provided window select the type (**Incoming**) that you will use for registration (Fig. 59). Then select the document flow (**Incoming**) where the document will be registered. Click **OK**.

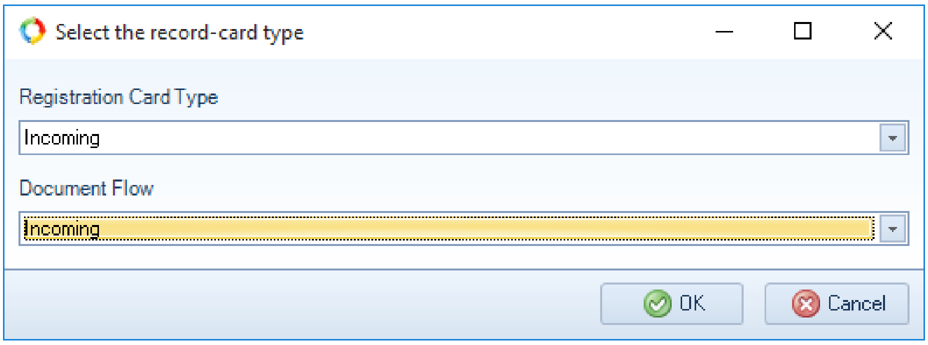


Fig. 59. Record Card type selection window

The **Record Card – Incoming** section will then appear in the **Forms (Views)** tab (Fig. 60).

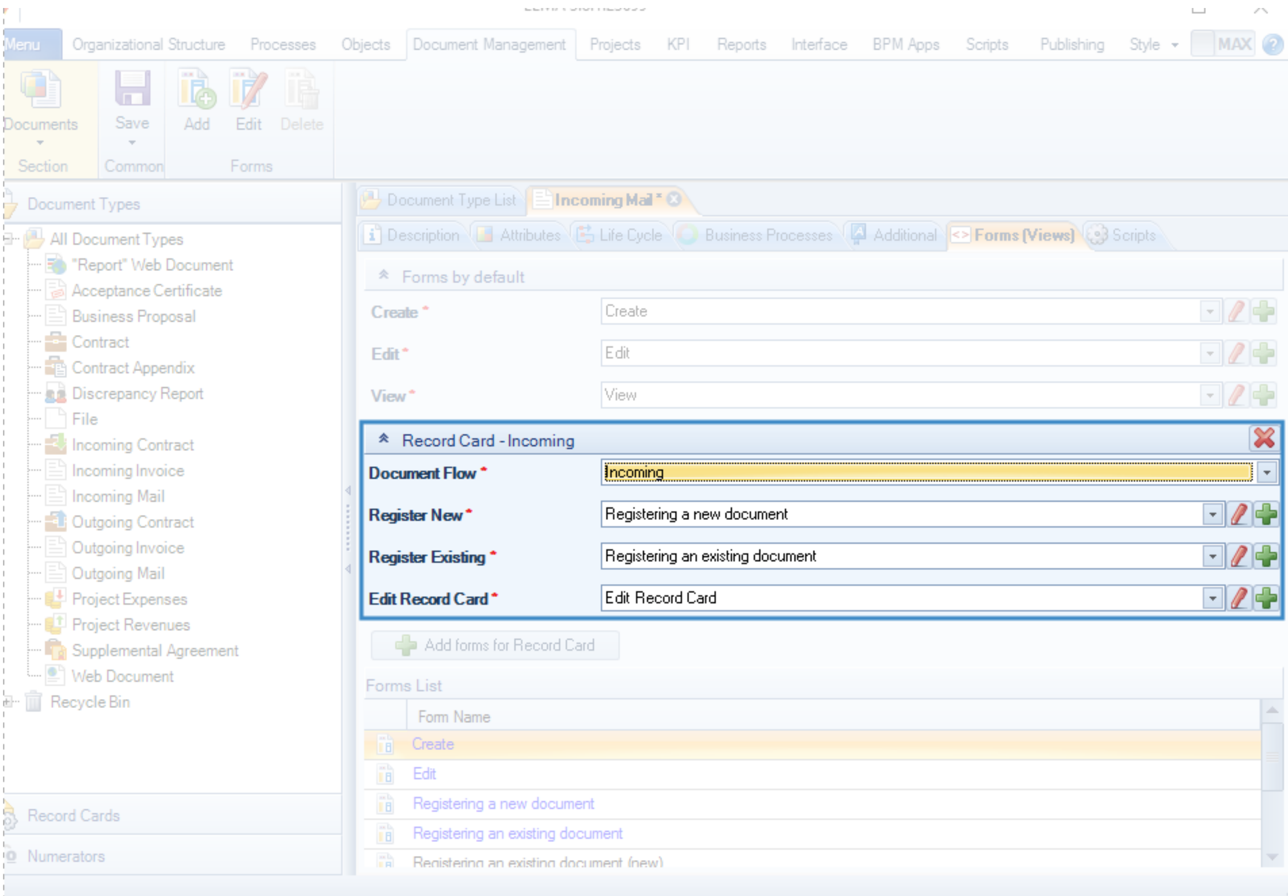


Fig. 60. Record Card - Incoming section

Select the previously created **Registering an Existing Document (new)** form from the drop-down list. Then save and publish the document type.

3.3.3 Customizing Records Classification Scheme

Once the Record Card is created, you have to customize the Records Classification Scheme.

Records Classification Scheme is a scheme that categorizes documents within the company at the moment when they are registered. The Records Classification Scheme specifies how the documents are stored, provides information about document retention periods, defines how to assign a registration number and manage other document settings.

ELMA may contain only one Record Classification Scheme. You can customize it for one calendar year or for an unlimited period.

The Records Classification Scheme is customized in **Administration → Document Management → Record Classification Scheme** (Fig. 61)

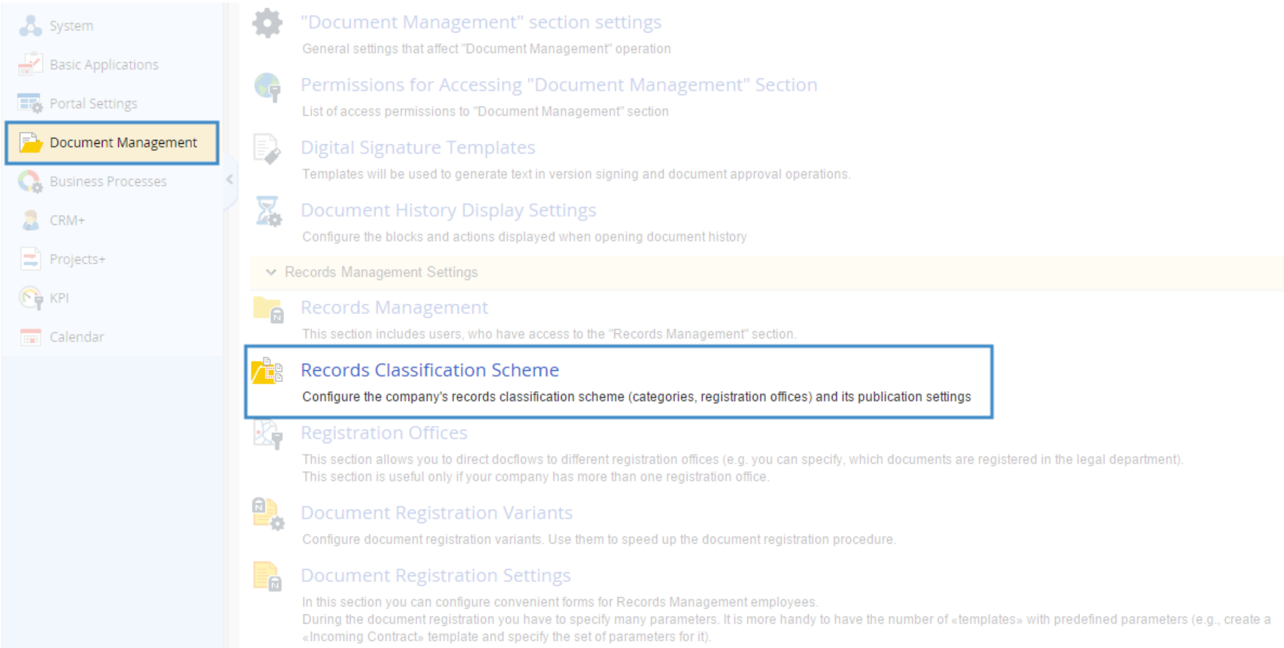


Fig. 61. Administration → Document Management

If you have activated the **Contract Management** process package, the Records Classification Scheme must already be partially configured.

If the Classification Scheme hasn't yet been created, the **Administration → Document Management → Record Classification Scheme** section will feature the toolbar which is used to create and publish the Records Classification Scheme (Fig. 62).

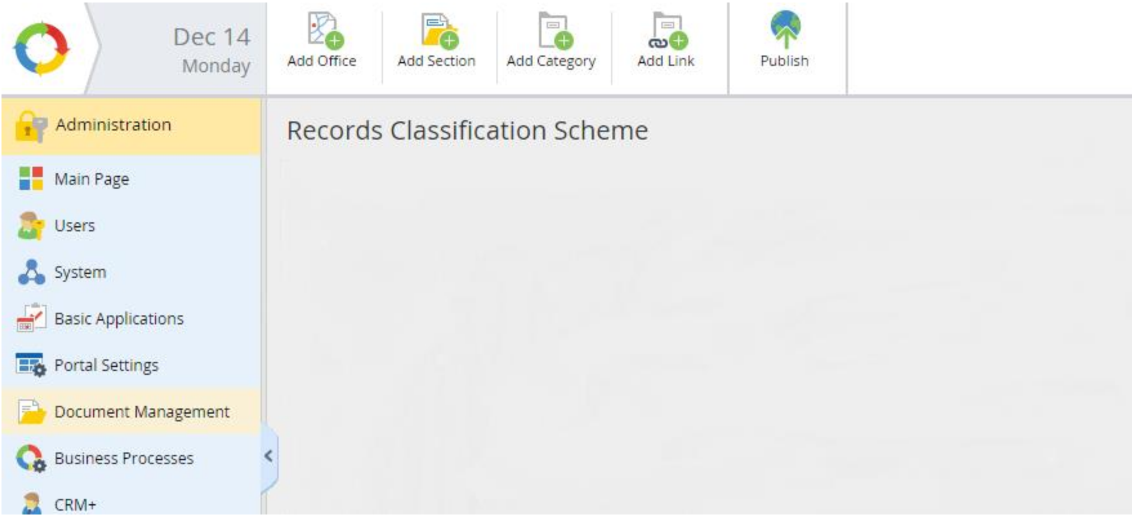


Fig. 62. Records Classification Scheme administration.

In **ELMA**, the Records Classifications Scheme has the following elements:

Registration Office – Represents the departments responsible for registration of documents.

Unit – Unites one or several categories. Units are created in registration offices with means of organization. The unit structure can represent the structure of your company.

Category – Document or a set of documents related to one subject or area of activity. Categories serve to classify documents and usually store documents of certain types. Categories contain only registered electronic documents.

Link to a Category - In **ELMA**, each category belongs to a certain registration office. Sometimes different documents have to be registered in one shared category. In this case, the category is created in the first registration office and a link to it is placed in the second registration office. Such settings make it possible collect the documents in a category and have them registered in both registration offices, using a single numbering system within the category.

Use the toolbar located on the administration page of the Records Classification Scheme to create elements of the Scheme.

Create a Records Classifications Scheme from scratch:

Step 1. Create registration offices.

Click **Create Office** and type a name in the pop-up window (Fig. 63).

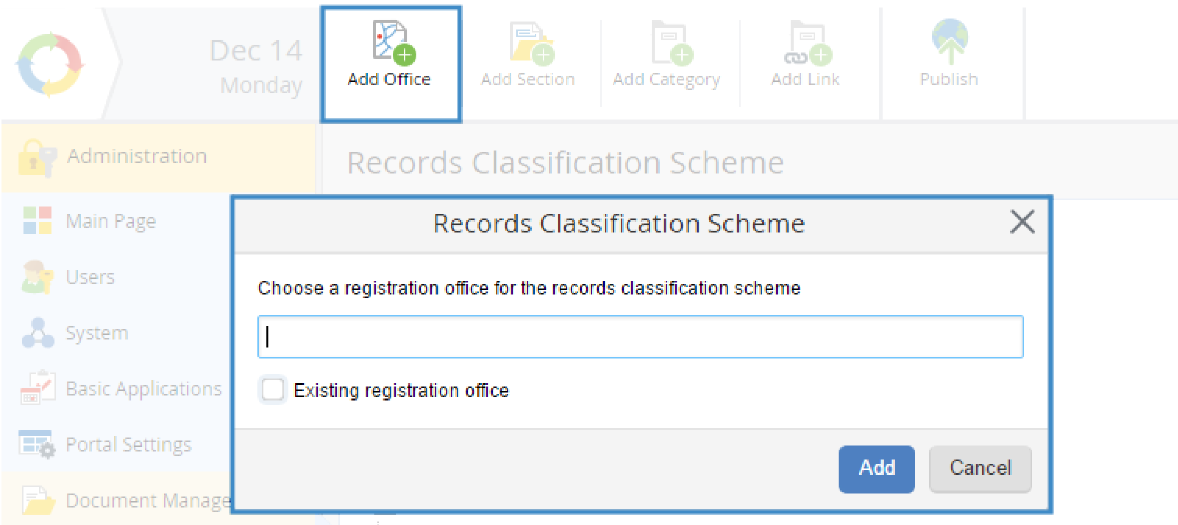


Fig. 63. Adding a registration office

Step 2. Configure registration offices.

Once the registration office is added, you have to configure it, specify the users who are allowed to register documents in this office. For that, go to **Administration** → **Document Management** → **Registration Offices** (Fig. 64). Here you can also create and delete registration offices.

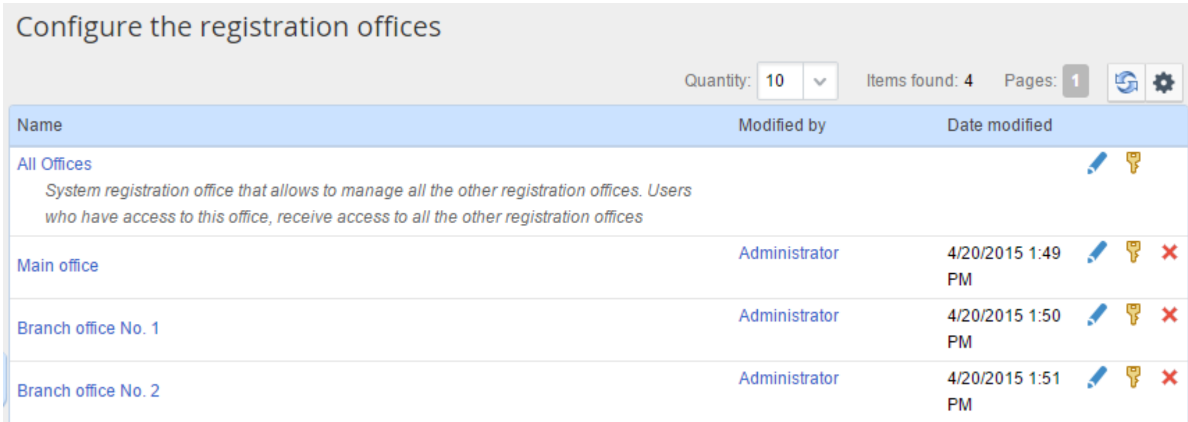


Fig. 64. Administration → Document Management → Registration Offices

When you click on the name of a registration office, a page opens, showing its properties (Fig. 65).

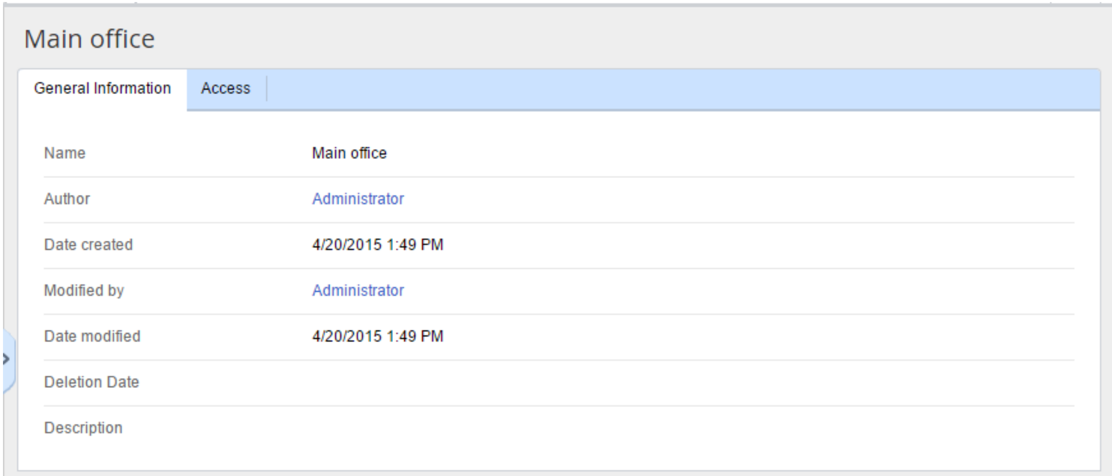


Fig. 65. Registration office

In the **Access** tab you can assign permissions to the organizational structure elements. Click **Add** to add users or user groups who will be allowed to register documents in the registration office (Fig. 66). Click **Save** in the same tab to confirm all the changes made.

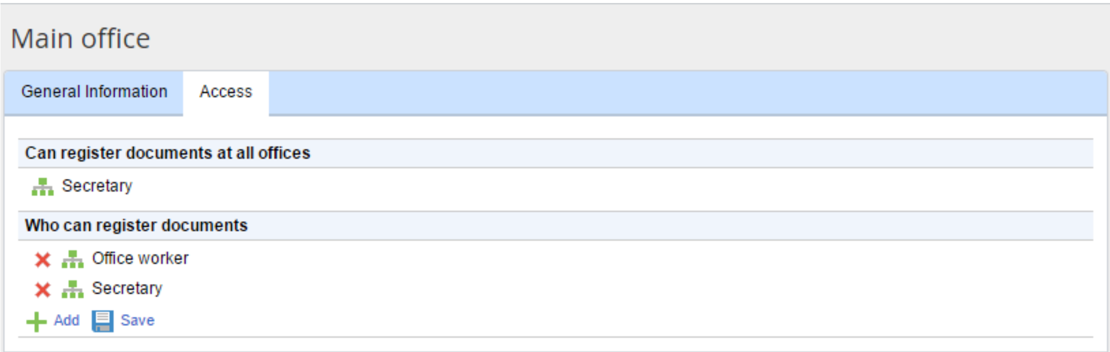


Fig. 66. Setting access to a registration office

You can allow certain users to register documents in all the registration offices. Give them access in the **Access** tab of the **All Offices** registration office.

Step. 3. Add Sections to the Records Classification Scheme.

Go back to creating the Classification Scheme's structure in **Administration** → **Document Management** → **Records Classification Scheme**.

Create a section for all the mail: select the registration office and click **Add Section**. You can also create a section using the button located next to the registration office name.

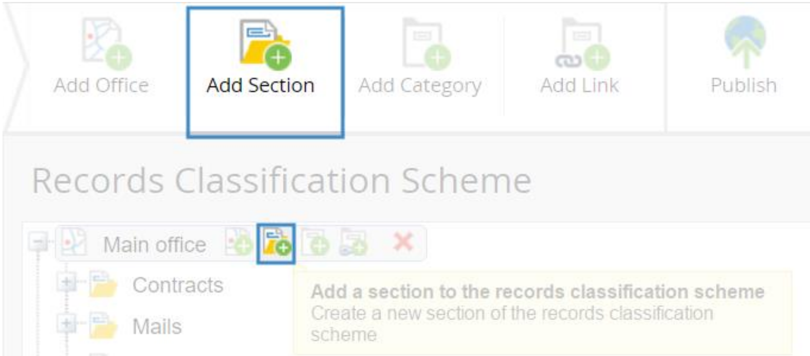


Fig. 67. Buttons for adding a section to the Records Classification Scheme

Type the section name in the provided window and click **Save**. The new section will appear in the Records Classification Scheme (Fig. 68).

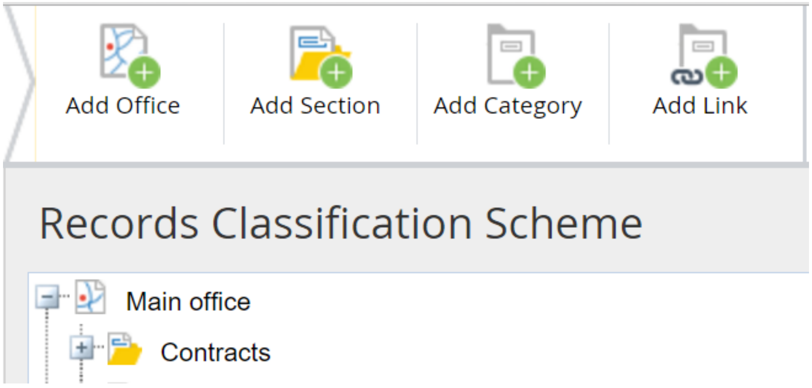


Fig. 68. Section of the Records Classification Scheme

Step. 4. Adding Categories.

Now, create categories for incoming and outgoing mail. Select the section where you want to add a category and click **Add Category** (Fig. 69). You can create categories directly in the registration office, too.

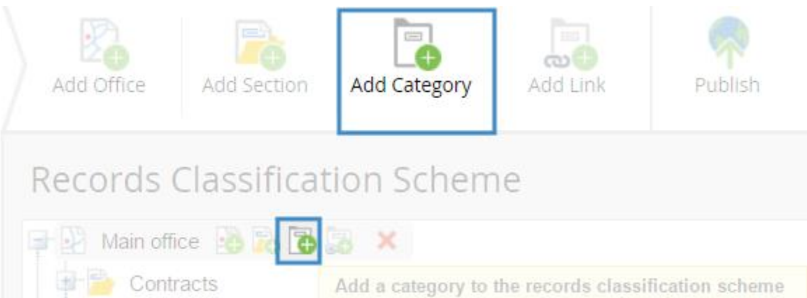


Fig. 69. Buttons for adding a category to the Records Classification Scheme

In the pop-up window, type the category name and adjust the settings (Fig. 70).

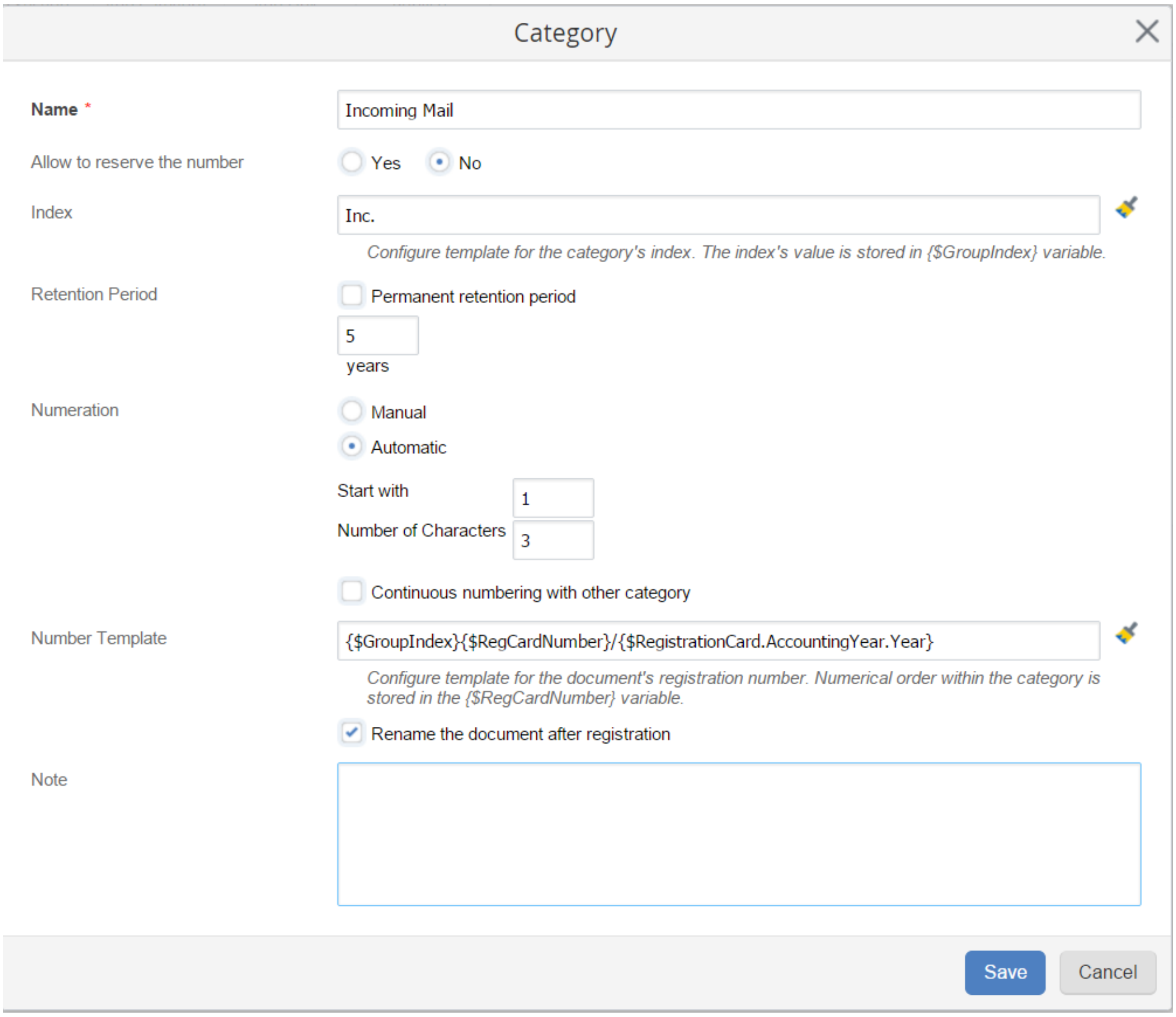


Fig. 70. Creating a category

Category settings:

Allow to reserve the number – makes it possible to reserve registration numbers in the current category (for more detail, see section 7.1).

Index – This prefix is added to the document number in its Record Card, if the **Number Template** field contains the {$GroupIndex} variable. Any combination of symbols is allowed, and you can also add system variables. Use the button to select a system variable.

Numeration – Specify if registration numbers are given manually or automatically. In manual mode, the users themselves type in the registration number. In automatic mode, continuous numbering becomes available and new fields appear: **Start with** (number of the first document registered after the Records Classification Scheme is published) and **Number of Characters** (number of characters in the registration number). You do not have to enter the registration number, the system itself will form it. In the registration number's template, numeration is defined by the {$RegCardNumber} variable.

If the number of characters is set to 3, the {$RegCardNumber} number part of the registered document will be 001. If you do not need zeros in front of the number, set the Number of Characters option to 0.

Number Template – Template for a document's registration number. The default template is the {$GroupIndex} variable that stores the **Index** value. The template can use other symbols and system variables. To enter a system variable, use the button and select the desired system variable in the provided window (Fig. 71).

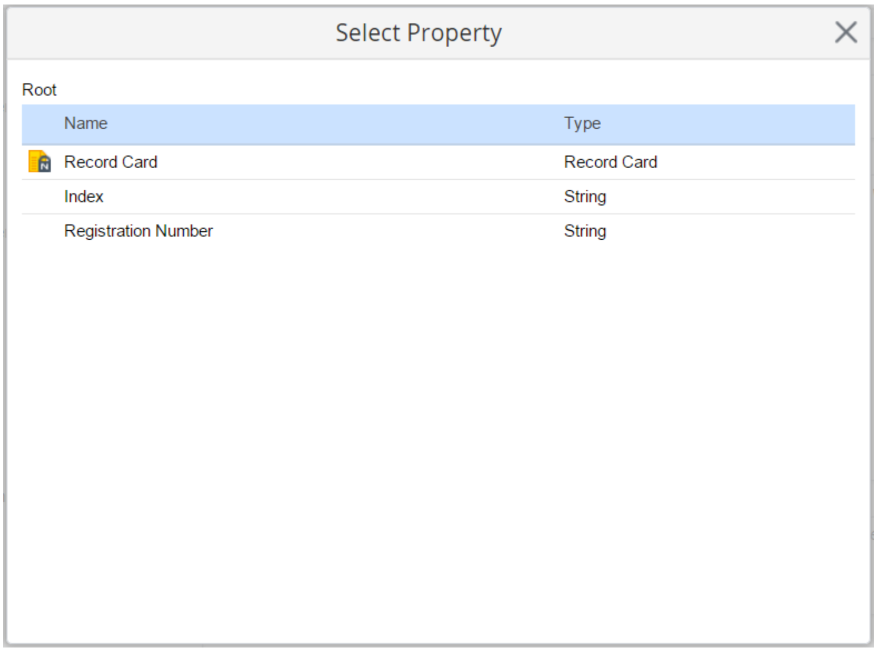


Fig. 71. Property selection window

Fig. 70 features the following registration number template: {$GroupIndex}{$RegCardNumber}/{$RegistrationCard.AccountingYear.Year}. It means that the registration number will consist of: "Index" "Reg.number"/"Accounting Year". The number of the first document registered in 2015 will be **Inc. *№001/2015***.

After configuring the settings, save the category. In Fig. 72 you can see an example of a Records Classification Scheme with an added category.

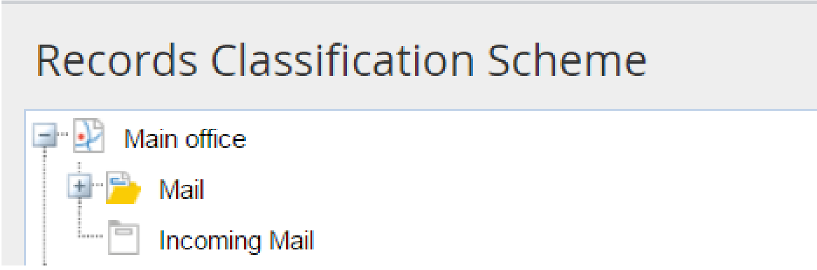


Fig. 72. Section and category added to the Records Classification Scheme

It is important to specify the document types that can be registered in each category.

Once you have created and saved the category, open the category page for editing (select the category and click) and go to the **Document Types** tab.

Click **Add** to add the **Incoming mail** document type to the category (Fig. 73). The document flow and the record card type are added automatically (as specified in section **3.3.2**). You can add various document types to a category. Every document type that you plan to register must have registration forms configured in **ELMA Designer**.

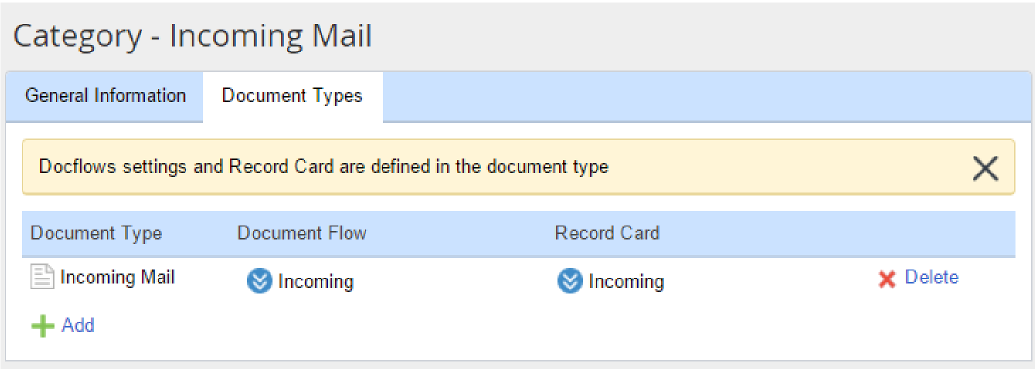


Fig. 73. Document type settings for Incoming Mail

Create sections and categories for all the documents that are registered within your company. You can see an example of a configured Records Classification Scheme in Fig. 74.

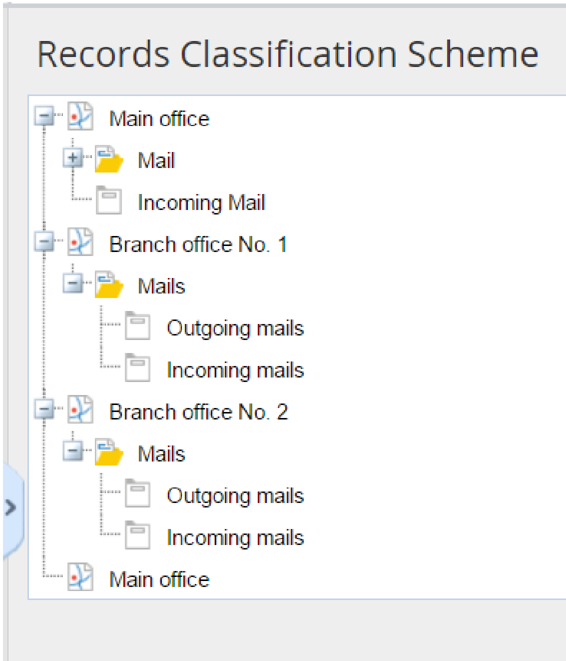


Fig. 74. Example of a Records Classification Scheme

Once you have created the Records Classification Scheme, publish it. **It is only possible to register documents in a published Record Classification Scheme**.

To do so, click **Publish** in the toolbar of **Administration → Document Management → Records Classification Scheme**. In the pop-up window, click **Publish** to confirm.

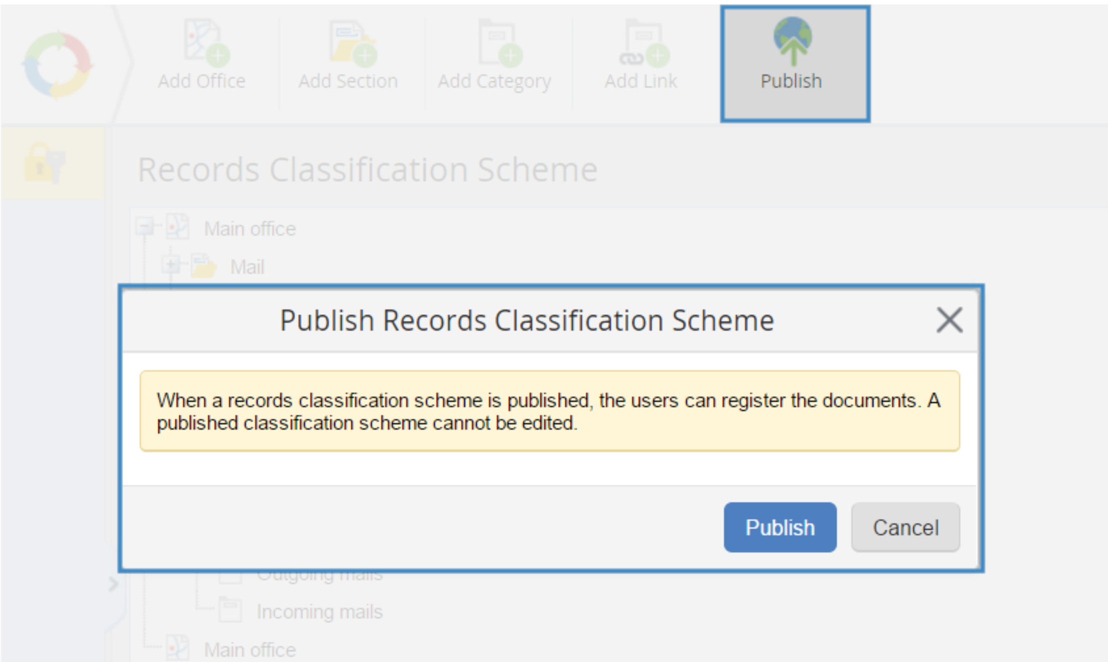


Fig. 75. Publish button and publication window

The Records Classification Scheme and its settings are editable. They can only be edited when the Records Classification Scheme is not published, so click **Cancel**

Publication to edit (Fig. 76). While the publication is canceled, documents cannot be registered in the system.

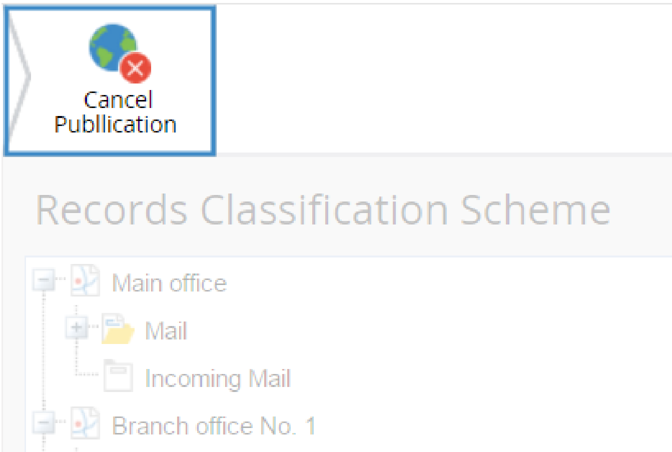


Fig. 76. Cancel Publication button

3.3.4 Configure Registration Variants

To register a document, you have to specify the registration office, category and document flow. To make it faster, you can use **Document Registration Variants**.

Registration Variant is a set of registration parameters saved in the system. If the same registration parameters are used rather frequently, you do not need to enter them manually every time, just use a corresponding registration variant. The registration variants are also used in the "Registration" operation of document routing processes.

It is possible to add a registration variant only if the Records Classification Scheme has already been created in the system and configured. To create a registration variant, go to **Administration** → **Document Management** → **Document Registration Variants** (Fig. 77). The registration variants are grouped by registration offices.

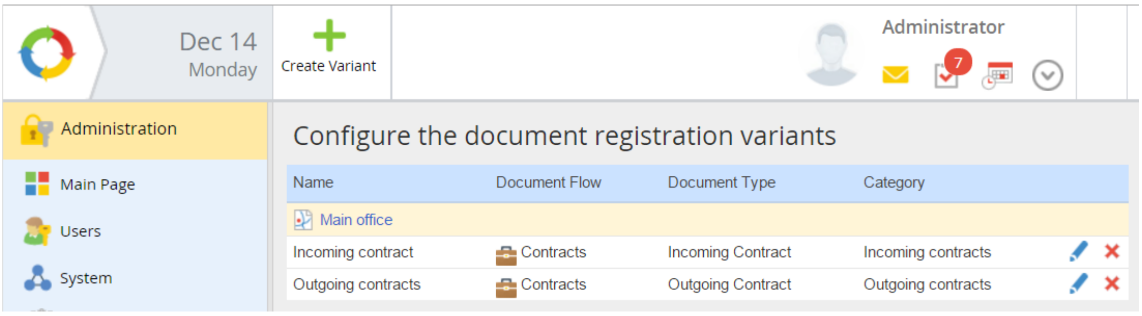


Fig. 77. Administration → Document Management → Document Registration Variants

Let's create a registration variant for incoming mail. Click **Create Variant** in the top menu of **Administration** → **Document Management** → **Document Registration Variants**. In the **Document Registration Variant** window enter the variant's name and select the document type, **Incoming Mail**. The new fields (**Document flow**, **Registration Office**, **Category**) are filled automatically according to the settings of the document type's Record Card (Fig. 78).

You can modify these fields only if the current document type has several Record Cards, or if this document type can be registered in several offices/categories. Otherwise, the fields cannot be modified.

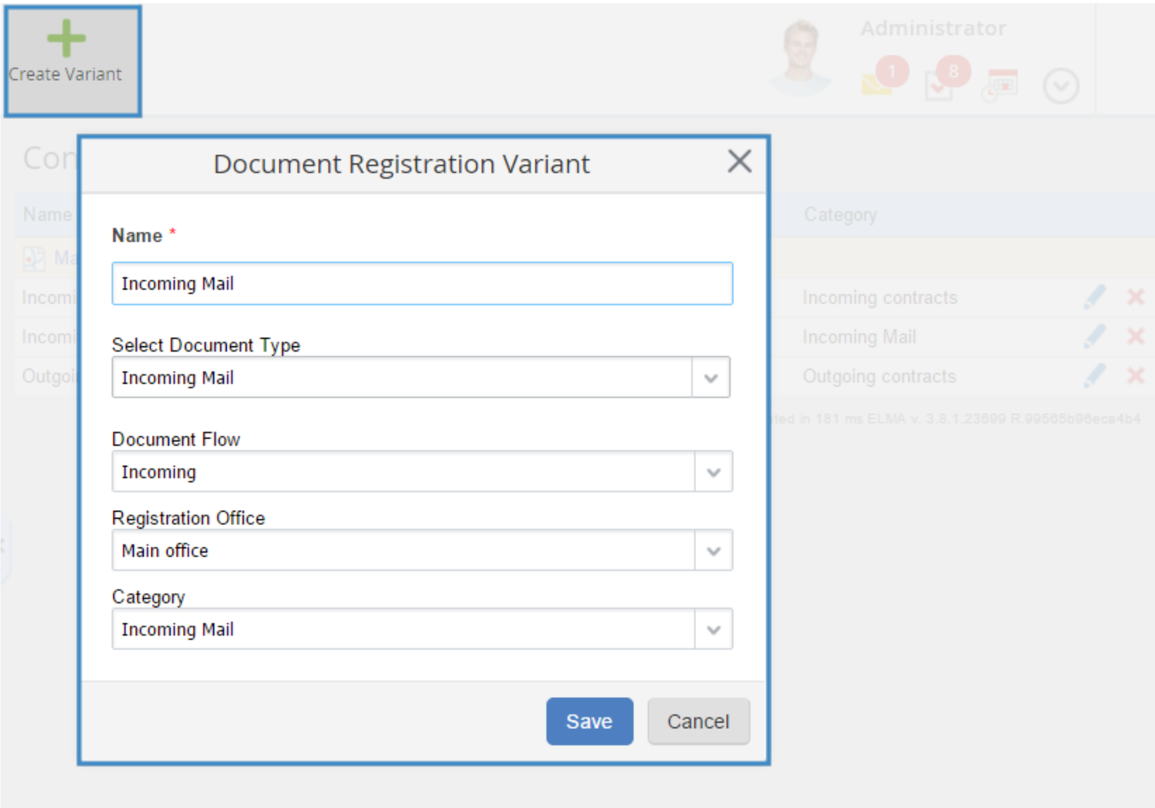


Fig. 78. Create Variant button. Registration Variant settings window.

After having configured the variant (as shown in Fig. 78) click **Save**. The variant will then appear in the list (Fig. 79). Later you can edit or delete it.

Configure the document registration variants

Name	Document Flow	Document Type	Category
Main office			
Incoming contract	Contracts	Incoming Contract	Incoming contracts
Incoming Mail	Incoming	Incoming Mail	Incoming Mail
Outgoing contracts	Contracts	Outgoing Contract	Outgoing contracts

Fig. 79. List of document registration variants

3.3.5 Registering Documents in Record Management

Users need the following level of access to register documents:

- Access to **View/Load** the registered document or higher.
- Access to the **Record Management** section to **View/Load** or higher.
- Access to at least one registration office.

You can create and register a document at the same time. To do so, click **Register** in the **Record Management** or **Documents** section of **ELMA Web Application**. You can place this button or a registration link in any area of **Web Application**.

To **register an existing document** (a document that has previously been created in the system), click **Register** in the **Actions** button of the document's page, if you have access permissions to register documents. If you don't, but still need the document to be registered, send it for registration. That means assigning a task to register a document to a user who has corresponding access permissions. The **Send for Registration** option is available in the **Send** button menu.

ELMA allows for **multiple document registration,** meaning that a document can be registered various times (section 7.3). It is useful when you need to register a document in several categories of the Records Classification Scheme.

Let's take a look at the registration process.

3.3.5.1 Registration of a New Document.

To register a new document, click **Register Document.** This button is available on the main page or in the **Record Management** section.

Step 1. Select registration parameters.

If there are available registration variants, select the desired one in the dialogue box. You can either choose from the most recently used ones or from the entire list. If none of the registration variants fits, click **Register Other Document**. The parameter selection window will appear (Fig. 80).

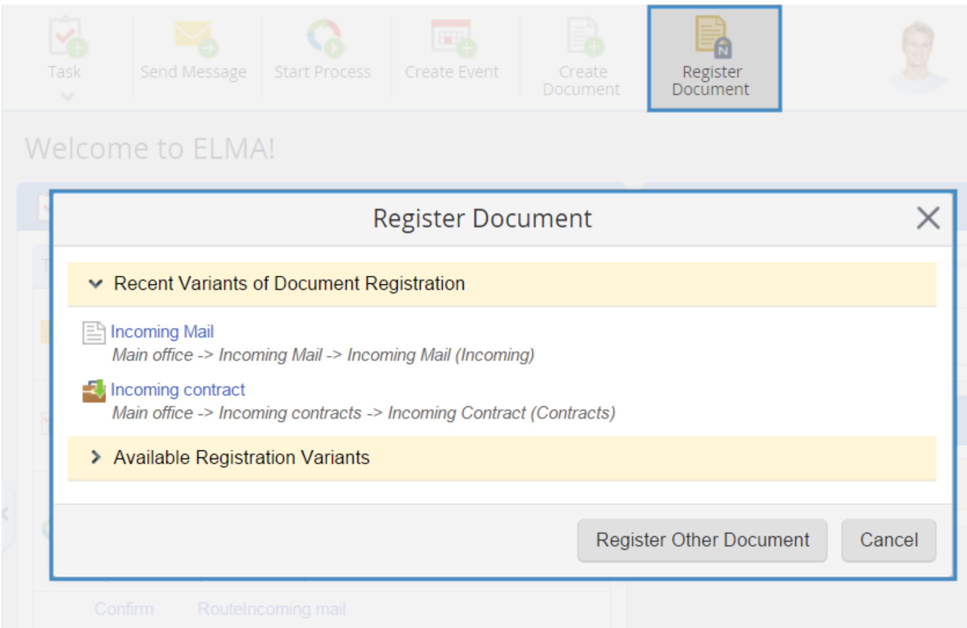


Fig. 80. Dialogue box for selecting a registration variant; Register Document button

Select the previously configured **Incoming mail** registration version.

Step 2. Registration and creation of a document

The creation and registration page has two tabs, **Common** and **Records Classification Scheme**.

The **Common** tab (Fig. 81) features the assumed registration number (since you have previously set up automatic numeration). You can change the date in the **Registration Date** field, if you need to. By default this field always shows the current date and time.

Now fill in the document creation fields. Their number and order may vary according to document type settings. Fig. 81 features document creation fields for the Incoming Mail document type.

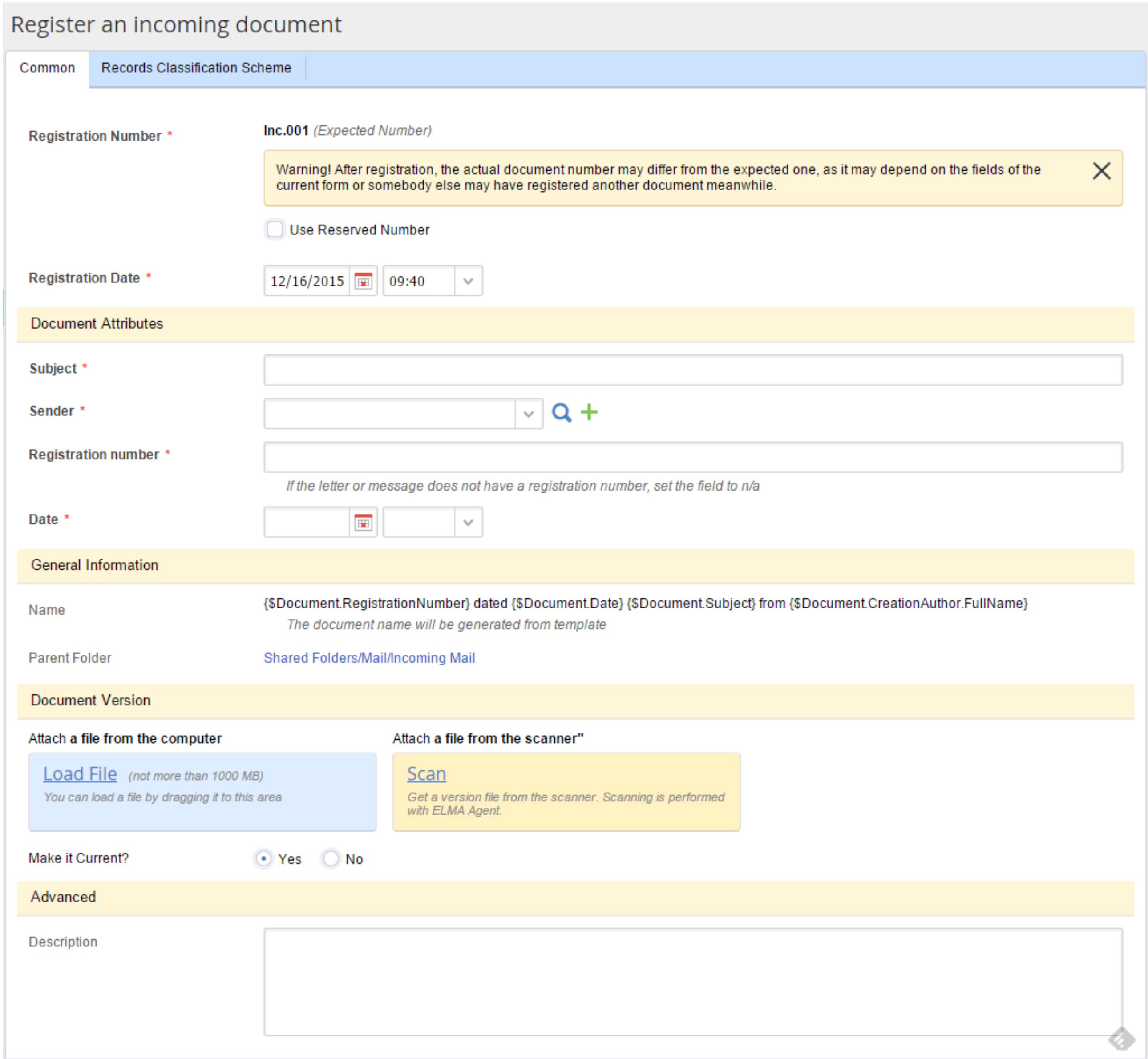


Fig. 81. Registration form for a new document.

To finish registration, click **Register** in the top menu (Fig. 82).

Once the document is registered, the system will offer you to select the next action (Fig. 82). To close this window, click **Close**.

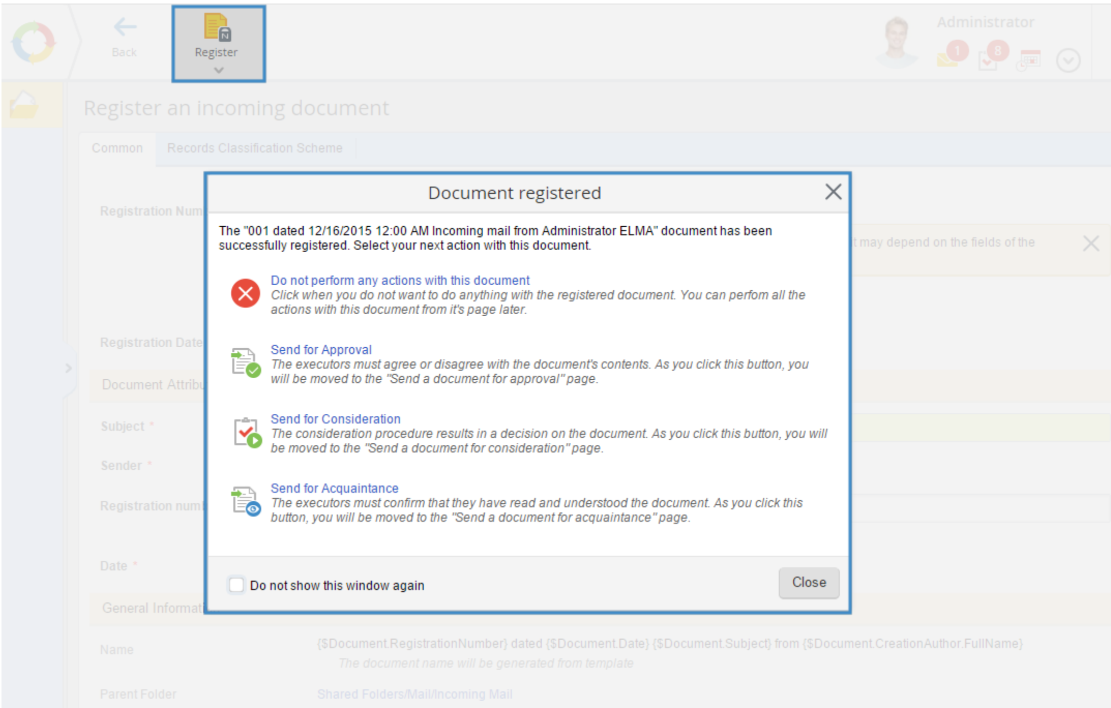


Fig. 82. Register button; pop-up window for selection of the next action

Registration of an Existing Document:

You can register an existing document either from its page or in the document's route.

To register a document from its page:

1. Open the document page in **ELMA Web Application**.
2. Click **Actions** in the page's toolbar and select **Registration** (Fig. 83).

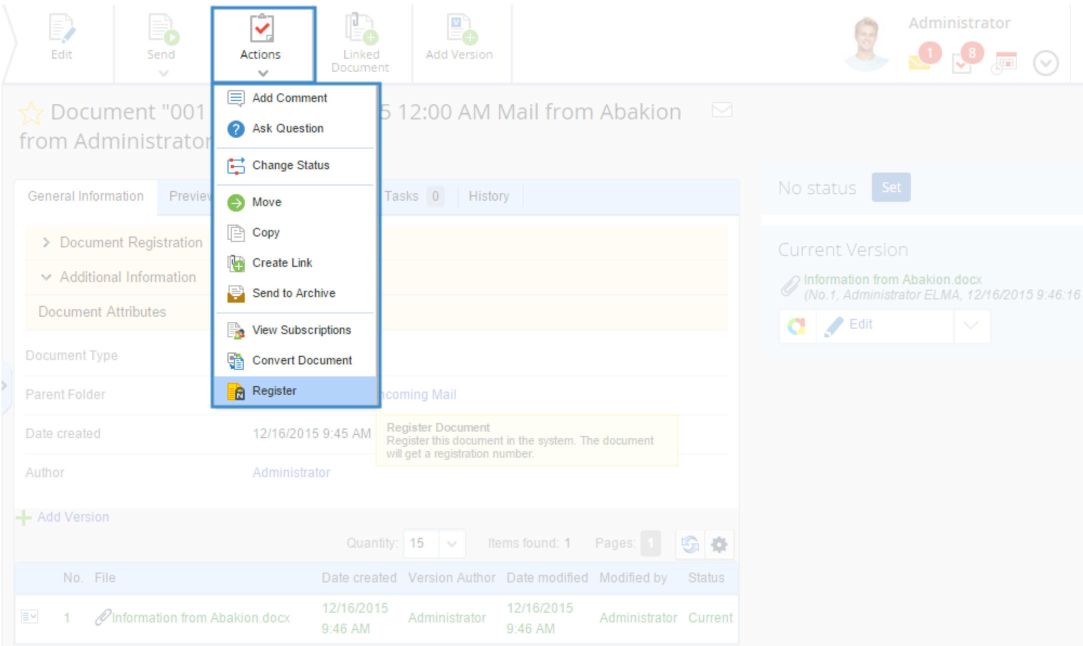


Fig. 83. Register button

If there is a convenient registration variant, the system will offer you to select it (Fig. 84).

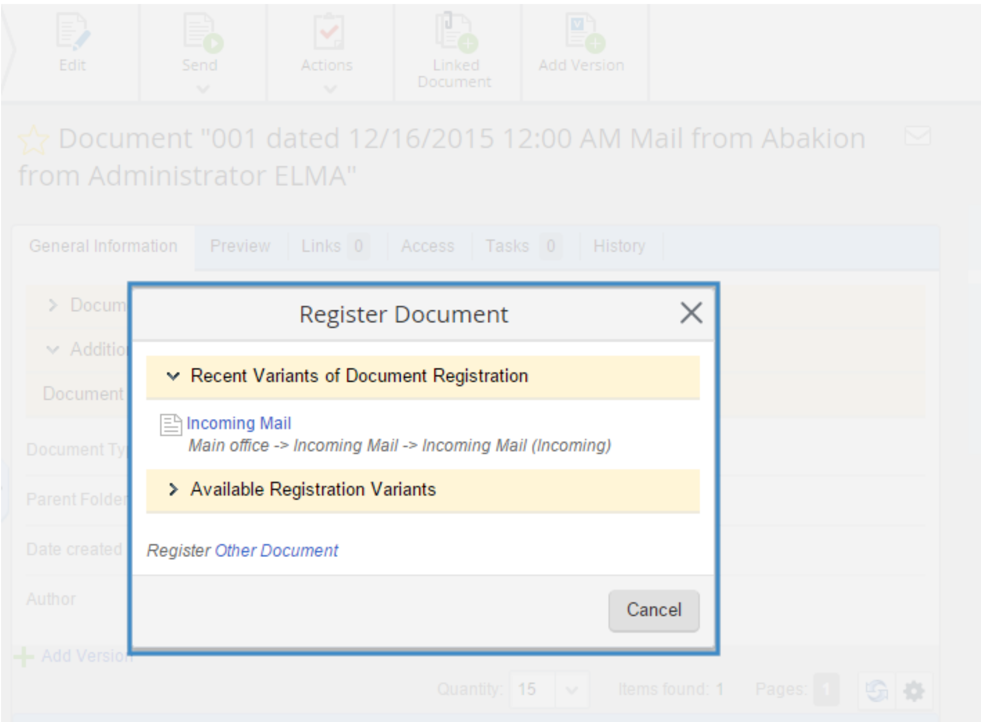


Fig. 84. Selecting a registration variant

Select the Incoming Mail variant, which you have previously customized. The document registration window will open (Fig. 85). At this point, registration is similar to that of a new document. To finish registration, click the **Registration** button in the top menu (Fig. 83). After registration, a window will be provided for you to select the following action (Fig. 82).

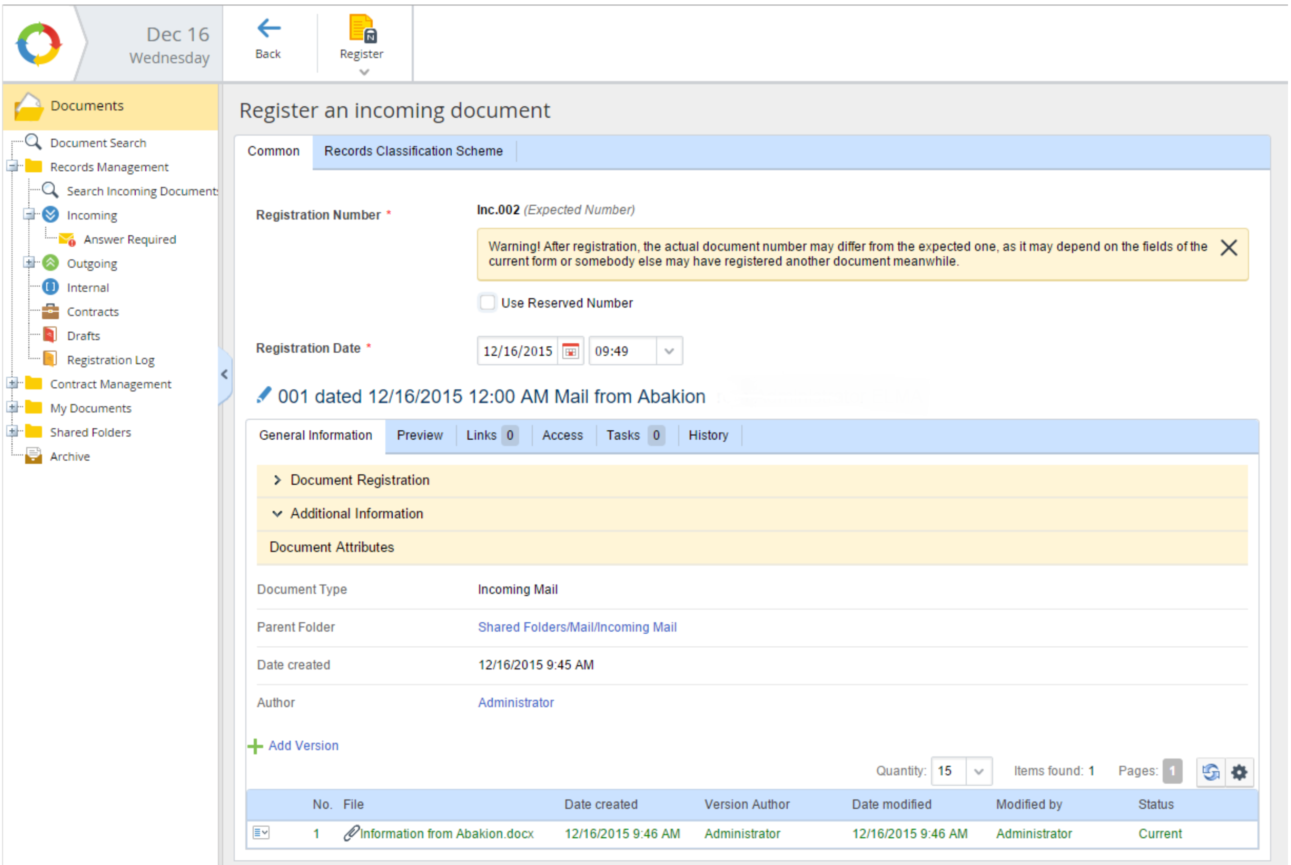


Fig. 85. Registration window for an existing document

3.3.6 Registration Number in the Document Name

It is possible to use the registration number in the document name. Configure it in **ELMA Designer** and in the **Records Classification Scheme**.

Step 1. In **ELMA Designer**, add the registration number attribute to the document name template. You can find it in the document type page, in the **Common Record Card Attributes** menu (Fig. 86). In the template it looks like this: {$Document.RegistrationCard[0].RegNumber}. We also recommend to forbid users to change the document's name (do not enable the **Allow to change document name** option).

After configuration, save and publish the document type and then restart the **ELMA server**.

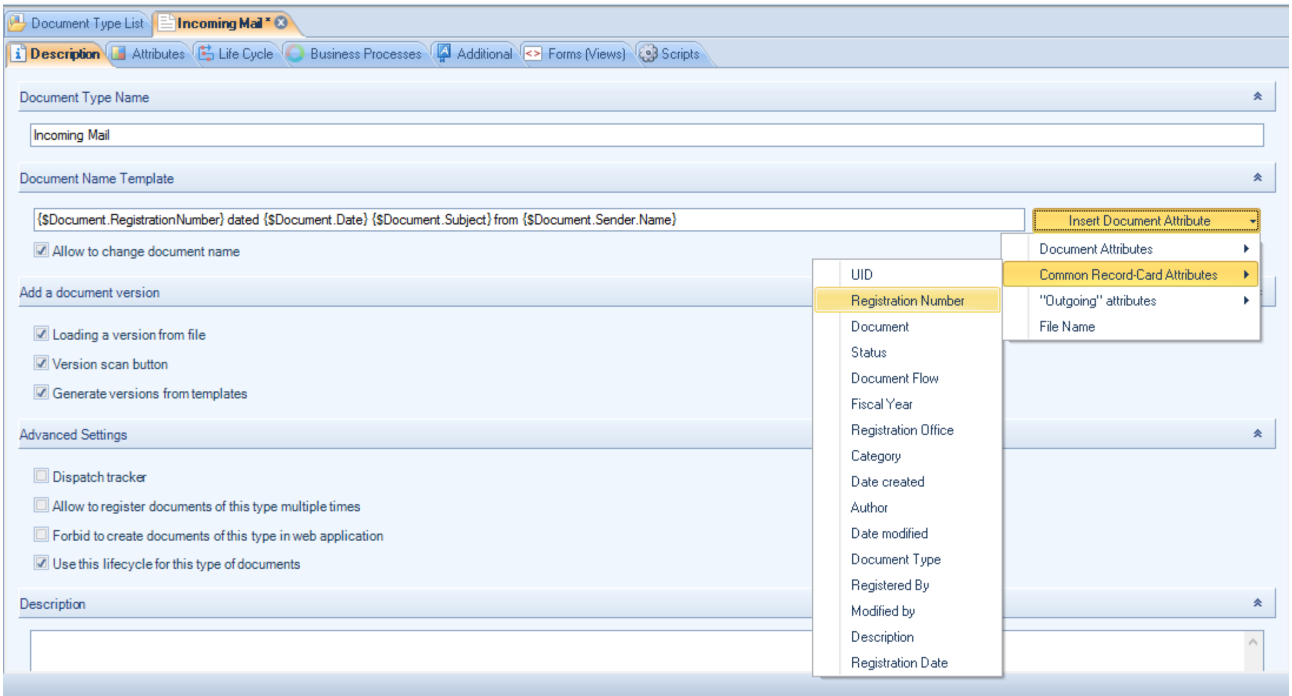


Fig. 86. Using registration number in document naming template

Step 2. When configuring a category for the current document type in **Web Application**, select **Rename document after registration**.

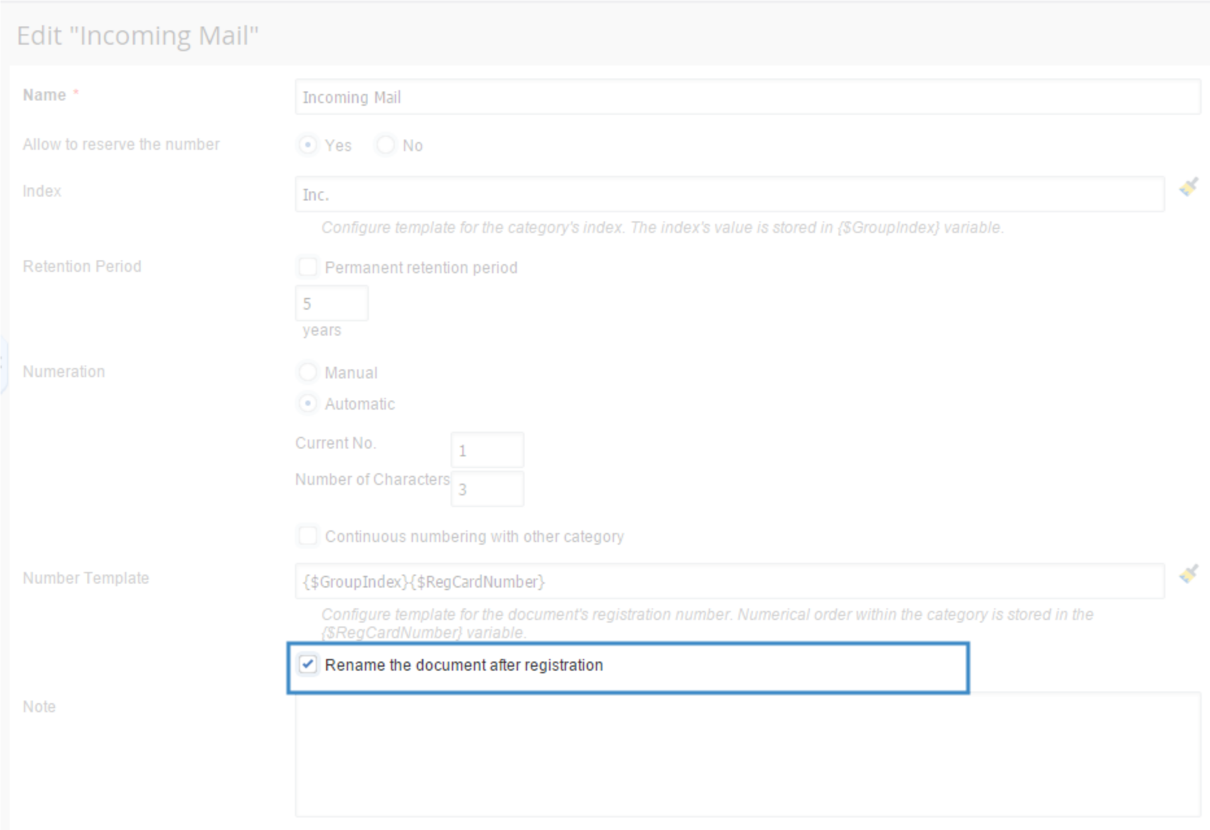


Fig. 87. "Rename the document after registration" option

In this case, the registration number will appear in the document's name right after registration.

For example, the name template for incoming mail is: *{$Document.RegistrationCard[0].RegNumber} ({$Document.IncomingNumber}) dated {$Document.Date} {$Document.Subject} from {$Document.Sender.Name}.*

Before registration, the document's name only features the incoming number (if any), date, subject and sender (Fig. 88).

Fig. 88. Document name before registration

After registration, the registration number is generated and added to the document's name (Fig. 89):

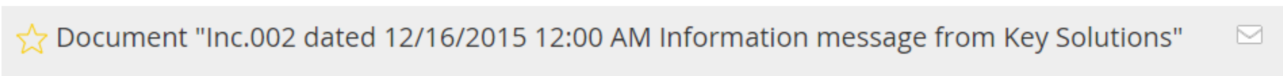


Fig. 89. Document name after registration

3.4 Configure Storage of Incoming Documents

Documents storage is a centralized storage system for electronic documents and folders. It provides quick access to required information and makes it easy to handle. Here you can view a document's history, limit access to certain documents and folders, etc.

Create and setup a storage system for incoming document with folders and filter folders, and set access permissions for folders and documents.

3.4.1 Folders

In **ELMA**, documents are arranged and stored in folders. Folders make up the whole document storage system. They are located in the **Documents** section of **ELMA Web Application**. Folders may contain documents or more folders, as well as links to documents stored in other folders.

Shared Folders are folders available to any user. However, to create a folder, users must have **Edit** permissions (or higher) for the parent folder. Usually, the structure of the shared folders is managed by the Administrator.

Create an **Incoming Mail** folder to store all the incoming mail in one place. To do so, open the **Shared folders** folder and click the **Folder** button in the top menu (Fig. 90). Type the folder's name in the pop-up window. You can also select a specific icon. Then click **Save** to save the folder.

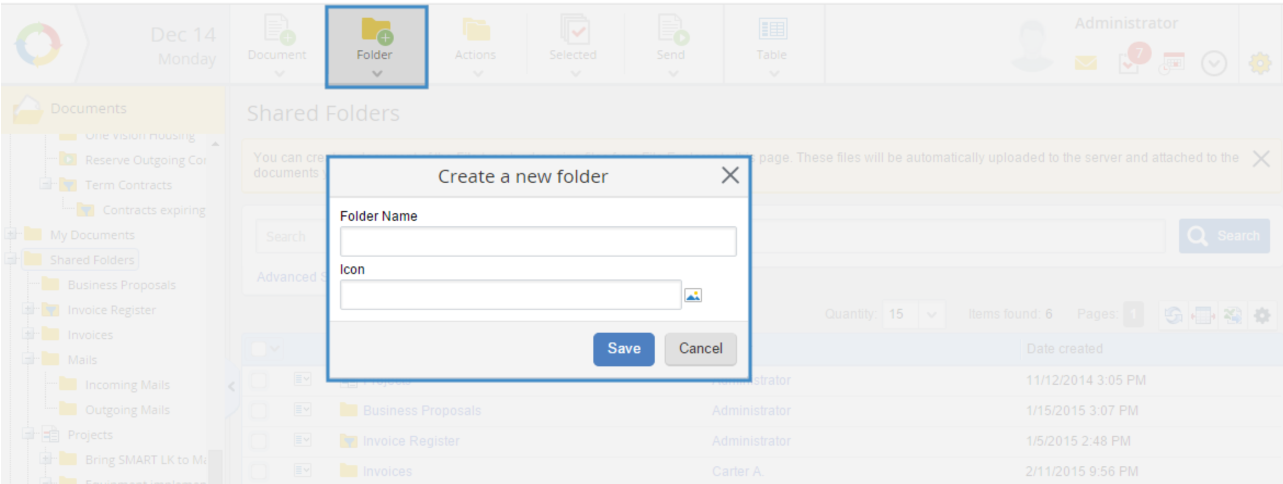


Fig. 90. Folder button and folder creation pop-up window

Now the **Shared Folders** folder contains the **Incoming Mail** folder.

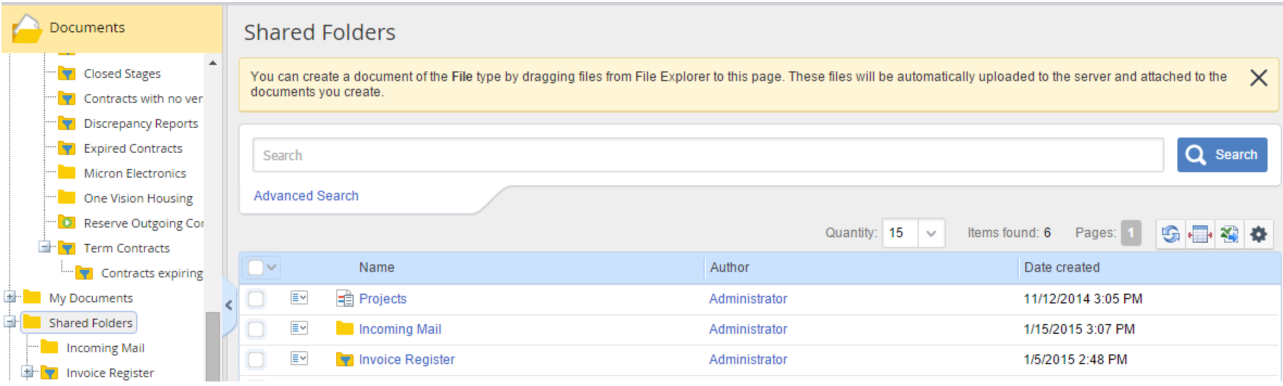


Fig. 91. Incoming Mail folder in the shared folders.

You can make the folder tree more complex. For example, add a **Mail** folder and then create folders for incoming and outgoing mail inside it (Fig. 92). The shared folders structure is customized precisely for each company's needs.

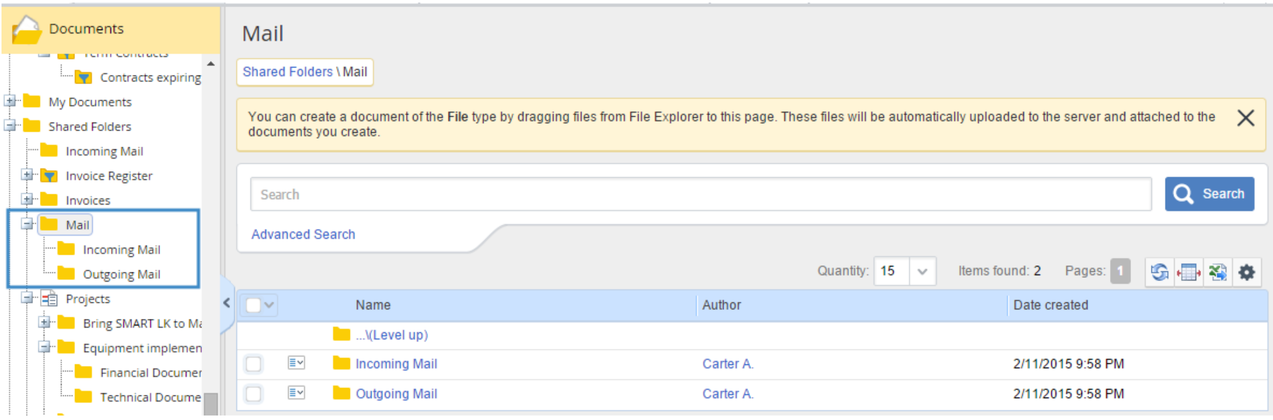


Fig. 92. Folders for incoming and outgoing mail.

Each folder has a toolbar (the top menu), which allows you to perform multiple actions with the folder, and with the documents it contains, if you have sufficient access permissions.

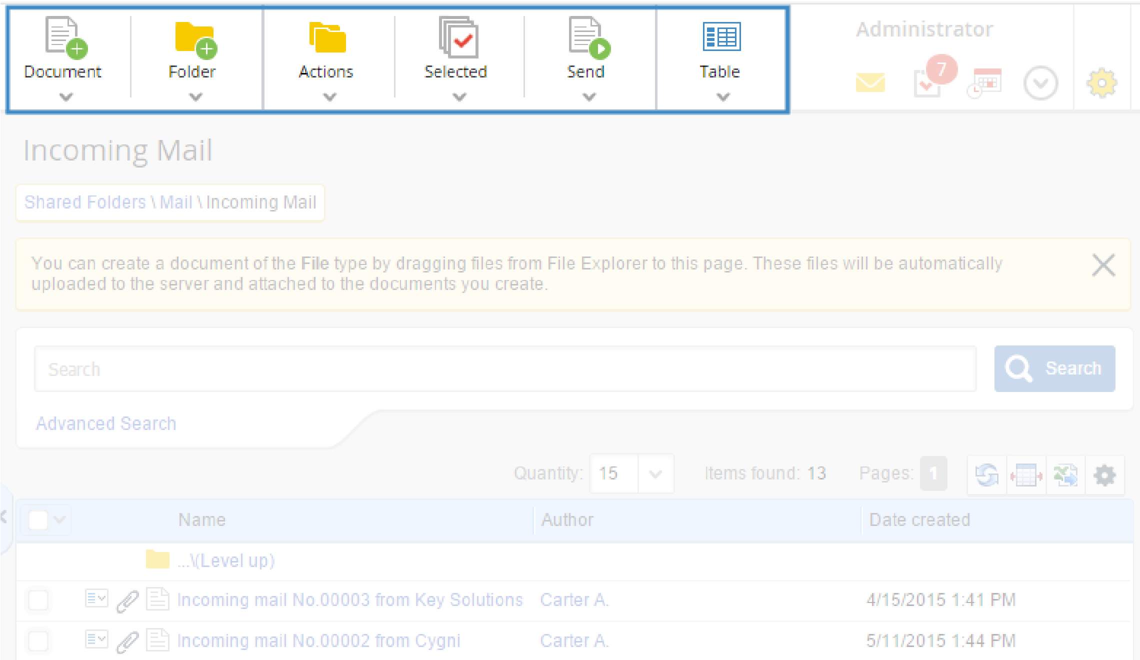


Fig. 93. Folder's toolbar (top menu)

For the description of the toolbar see **ELMA Help**.

When a folder is created, you have to set access permissions. By default, the folder inherits the parent folder permissions; the author (the user, who created the folder) has full access to the folder. For more details on folder permissions see section 3.4.3.

3.4.2 Filter Folders

A **Filter Folder** does not store the documents but simply displays them according to filtering parameters.

The parent folder of these documents is specified in each document's page. The filter works for documents only, so it is impossible to make a selection of folders. In the folder tree and on the parent folder page, filter folders are marked with the icon. Filter folders can be created as sub-folders in a folder that the current user has access to (**Edit** permission or higher).

Let's create a filter folder for incoming mail to separate documents by year (depending on the receipt date, with the **Date** property). Go to the **Incoming Mail** folder and click **Create Filter Folder** in the drop-down menu of the **Folder** button. The filter folder setup page appears, featuring 5 tabs (Fig. 94).

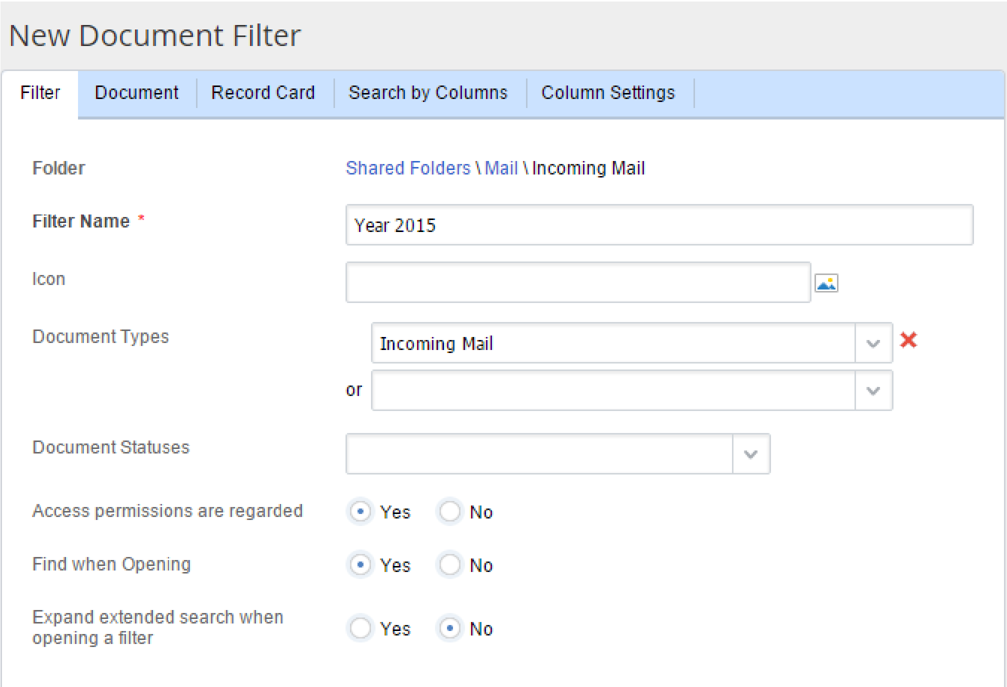


Fig. 94. Creating a filter folder. Filter tab.

In the **Filter** tab, type the filter folder's name. For example, Year 2015. Then select the Incoming Mail document type (Fig. 94). Leave the other settings as they are.

The **Document** tab features properties of the Incoming mail document type, since you selected this document type in the previous step. These properties are used for searching. This section is unavailable if several document types are selected.

Fill in the **Incoming Mail** section as shown in Fig. 95, and leave the other default settings as they are. This means that we will use this filter folder to search for all documents of the Incoming Mail document type, whose **Date** property is within

01.01.2015 and 31.12.2015. Since there is no parent folder selected, all the folders will be searched.

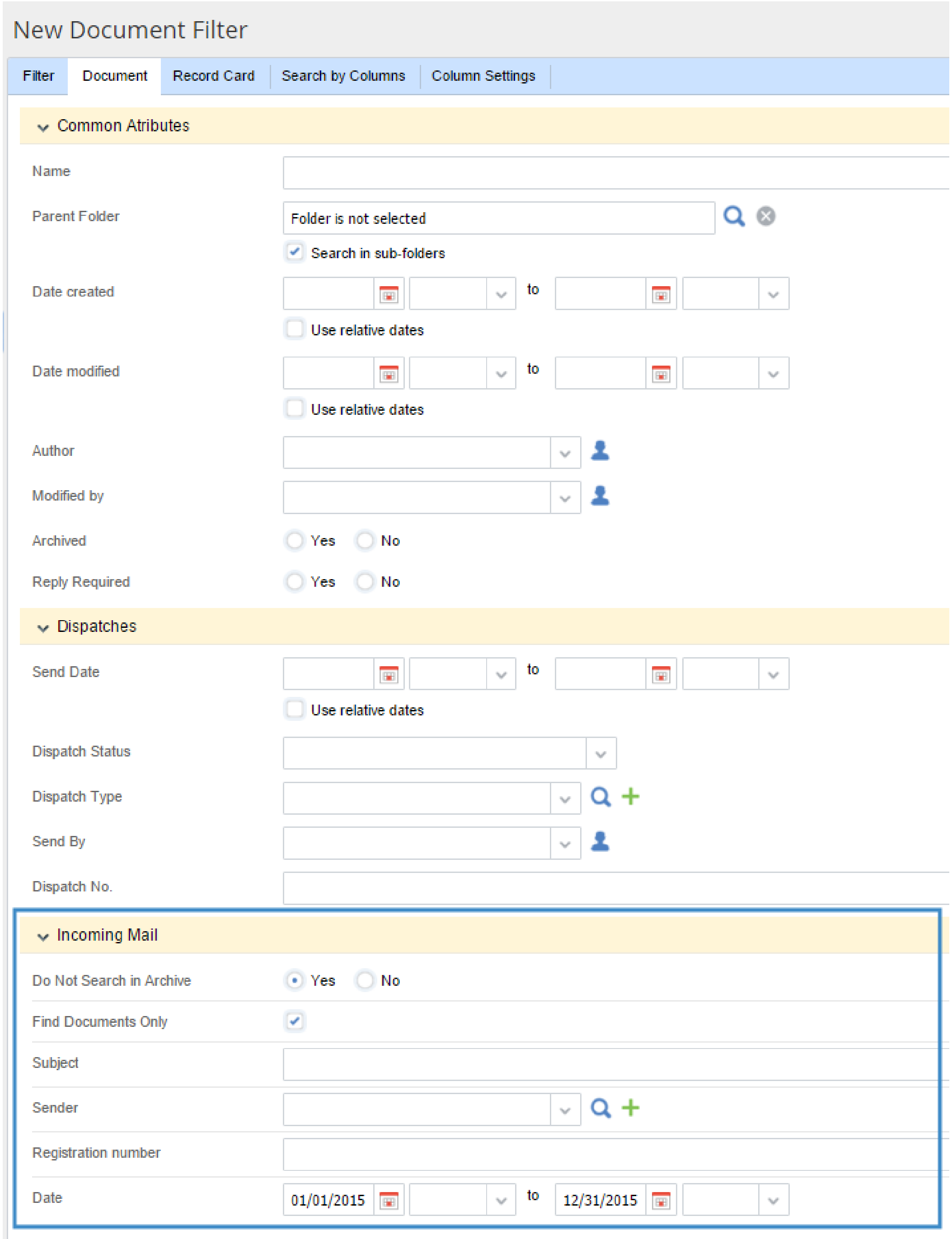


Fig. 95. Creating a filter folder. Document tab.

You can set up filtration parameters to make only registered documents available in search. For that, go to the **Record Card** tab (the **Common Attributes** or **Records Classification Scheme** area). Specify Document Flow, Record Card type and Status as shown in Fig. 96.

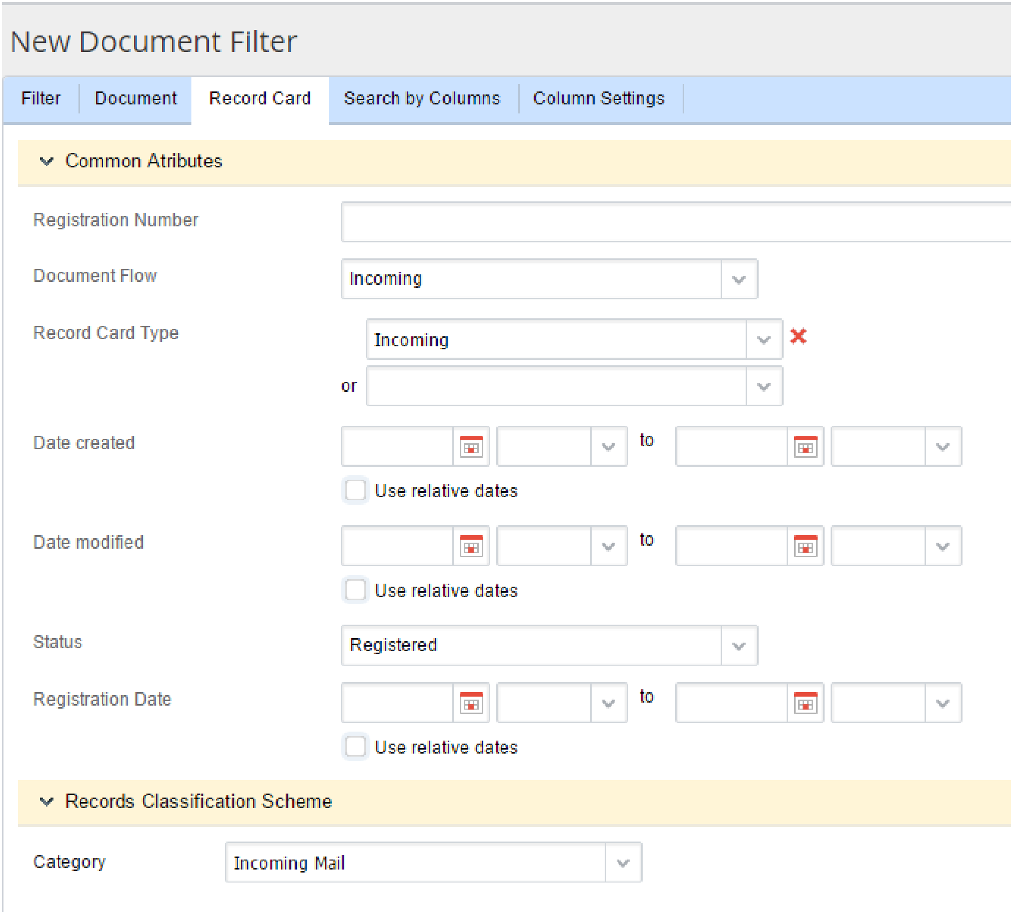


Fig. 96. Creating a filter folder. Record Card tab.

In the **Search by Columns** tab select the properties for advanced search. To add a property to advanced search, double left click on its name in the **Available Elements** column. The property will then be added to the **Selected Elements** column. You can see an example of these settings in Fig. 97.

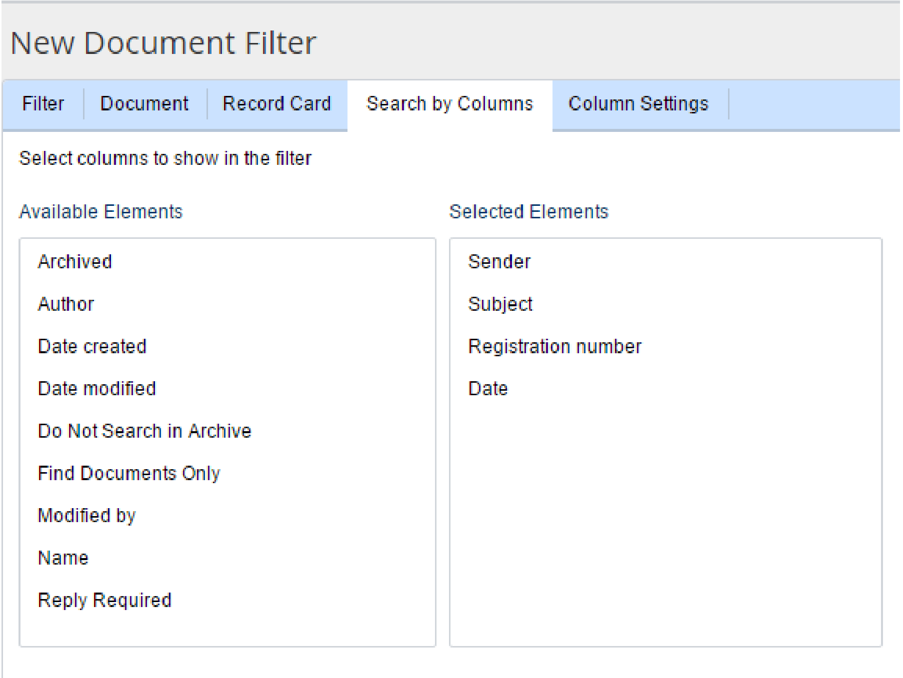


Fig. 97. Creating a filter folder. Search by Columns tab.

With settings as in Fig. 97, the **Advanced Search** field (hidden by default) in the filter folder will look like this (Fig. 98):

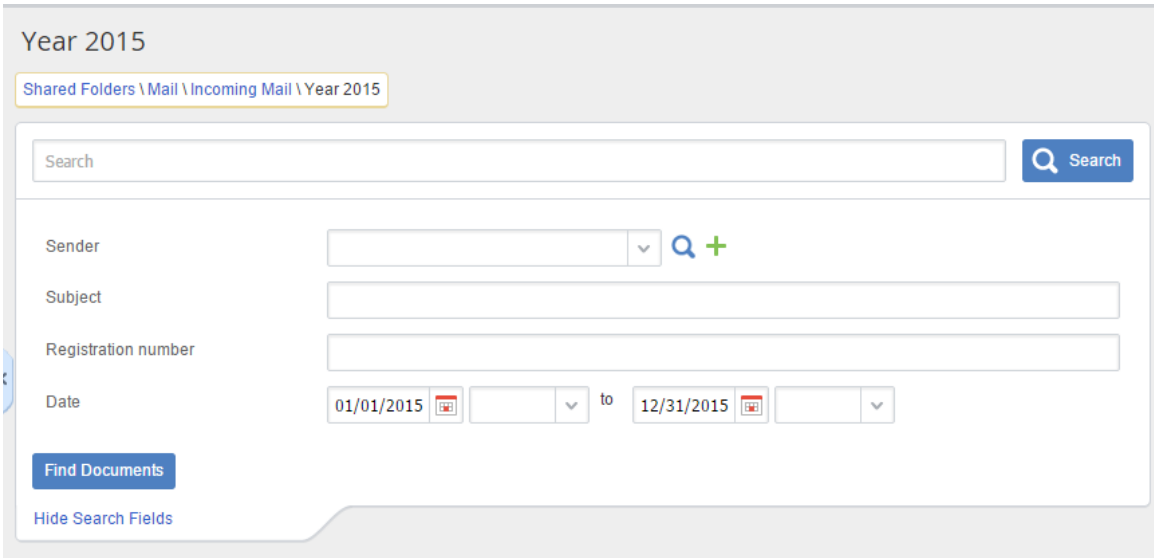


Fig. 98. Advanced search in the filter folder.

Learn more about advanced search in Chapter 8, sections 8.1 and 8.2.

In the Column Settings tab, you can change the layout of the document list. By default, the document list displays the document name, author and date created. Now add Incoming Mail properties: **Sender** and **Registration number**, select sorting by **Date Created** and set the number of items displayed in the table at 50 (Fig. 99).

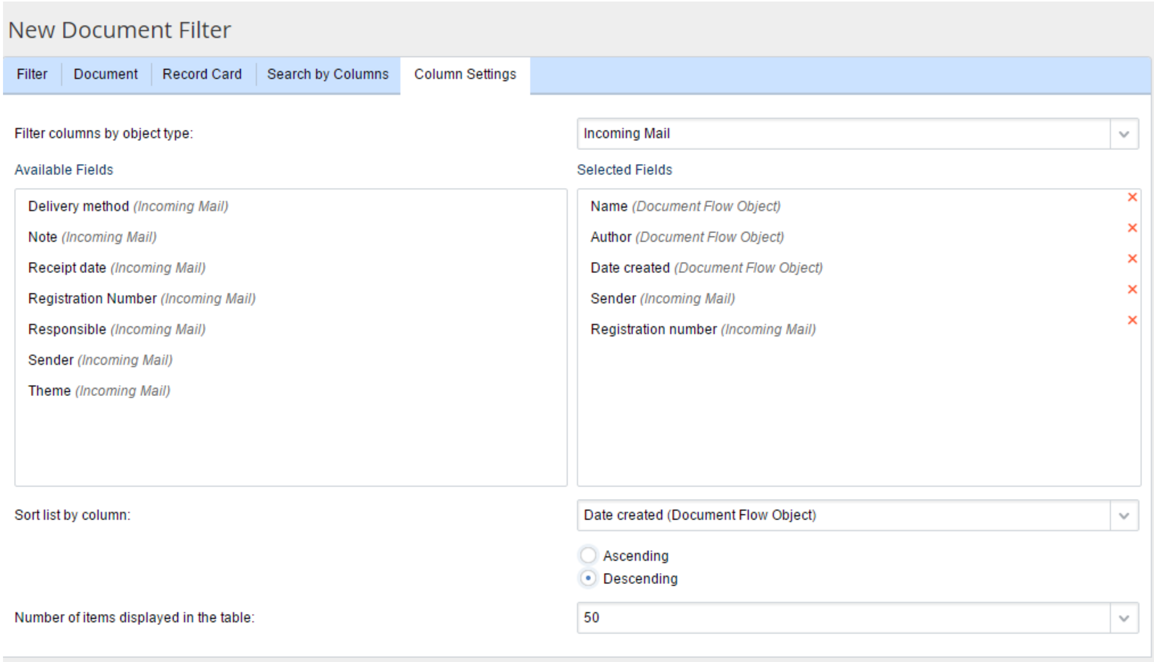


Fig. 99. Creating a filter folder. Column Settings tab.

With settings as in Fig. 99, the document list in the configured filter folder will look as shown in Fig. 100.

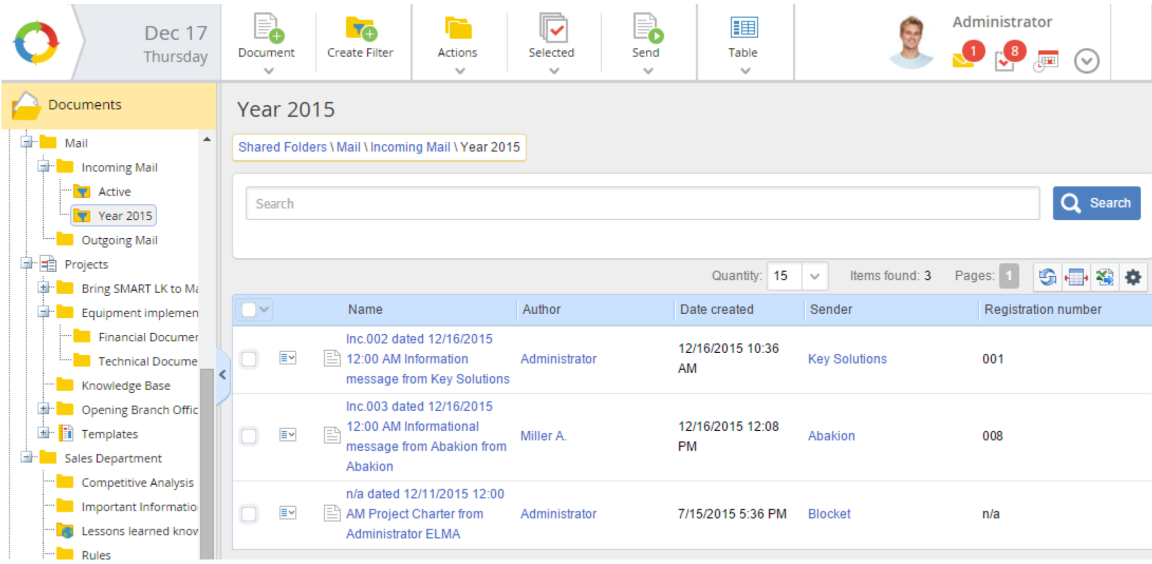


Fig. 100. List of documents in the filter folder.

Once configured, save the filter folder by clicking **Save** in the top menu. Use the **Actions** button to edit the settings, to access, delete and move the filter folder.

In a similar way, configure a filter folder for the year 2016. Set the **Date** property to “from 01.01.2016 to 31.12.2016”. Now, any document dated 2016 will automatically go to this filter folder.

With filter folders you can easily manage quick access to required documents. Filter folders are often used for documents that have a certain status, for example, unpaid incoming invoices, unsent outgoing mail, contracts pending approval, etc.

3.4.3 Managing Access Permissions

ELMA allows you to configure granular access permissions to documents and folders in a flexible manner.

By default, a document/folder is accessible to:

- Author/creator (full access by default);
- Author's superiors (according to the organization structure), who have the same permissions as the author/creator;
- Users added to **Access to all documents** (in **Administration → Document management → Permission for Accessing "Documents" Section → Access to the «Documents" Module**).

There are several access levels in **ELMA**:

View/Load – Allows a user to view a folder or a document and download document versions from **ELMA server** to the user's local PC. Does not allow the user to edit folders or documents.

Edit – Allows a user to **View/Load** as well create new document versions, modify attributes and do other similar operations. The **View/Load** permissions are given automatically when the **Edit** access level is assigned.

Manage Permissions – Allows a user to manage permissions of other users, whose level of access is inferior to the level of the current user. Does not allow the user to assign **Full Access**.

Create Documents (folder access only) – Allows a user to create documents in the actual folder. With this level of access the user automatically acquires **View/Load**, **Edit**, and **Manage Permissions**. To move a document to the folder with this access level, you must have at least the Create documents access permissions.

Full Access – Gives full access permissions, and allows a user to manage permissions. **Manage permissions**, **View/Load**, and **Edit** access permissions are added automatically.

A document or folder can inherit parent folder permissions. Select this option when configuring access permissions to the folder or document.

When implementing the granular access permissions, it is preferable to give access to job positions within the organization structure instead of specific users. This will allow you to avoid reconfiguring permissions if the user changes their job positions and provide the necessary access permissions to the user who takes the office.

Setting Access Permissions to a Folder.

Only a user whose access level is of **Manage Permissions** or higher can give access permissions to a folder; usually it is the person who created the folder.

To manage a folder's permissions, click **Actions** → **Configure Access** (Fig. 101).

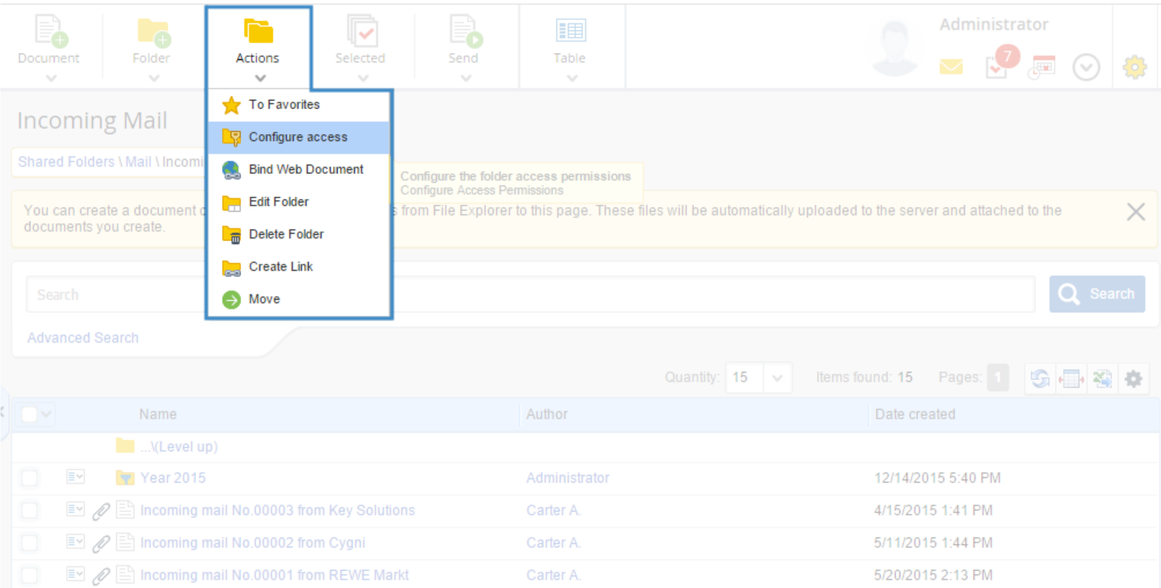


Fig. 101. Folder page. Actions button.

In the provided window (Fig. 102) manage permissions by using the **Add** button and access level checkboxes. Then click the **Save** button on the bottom of the window.

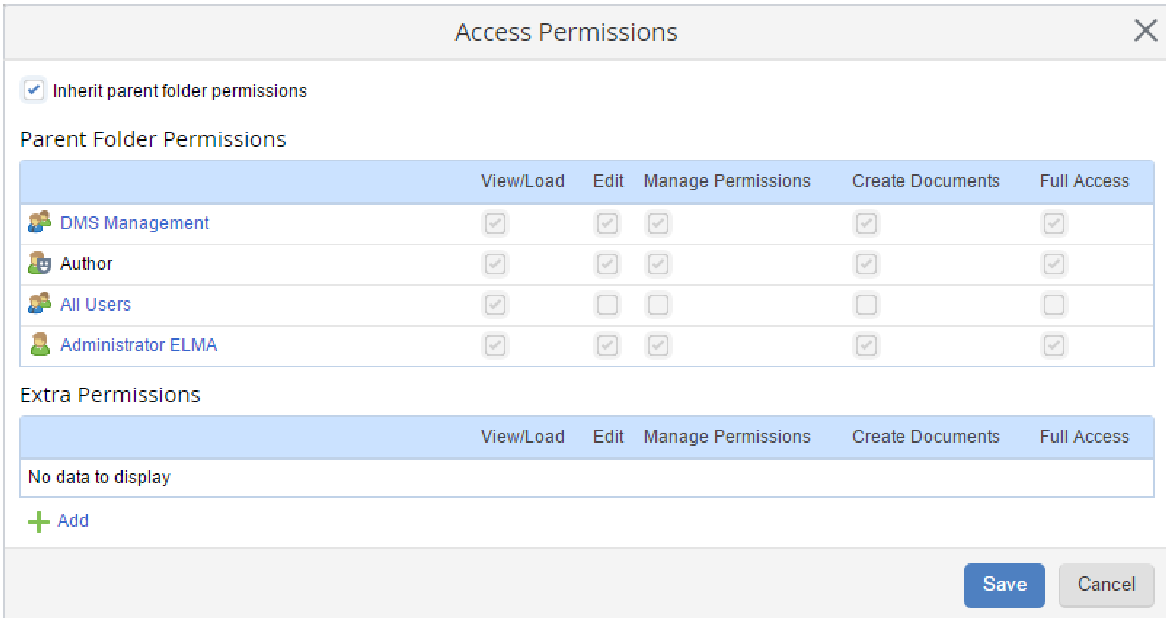


Fig. 102. Dialogue window for setting access to a folder.

There are **Parent Folder Permissions** and **Extra Permissions**. Access permissions given to a user are added to the **Extra Permissions**. When configuring a folder, you cannot change its parent folder permissions. To cancel inheriting, deselect the **Inherit parent folder permissions** option.

Setting Access Permissions to a Document.

Only a user whose access level is of **Manage Permissions** or higher can give access permissions to a document. The permissions are managed in the **Access** tab of document page (Fig. 103).

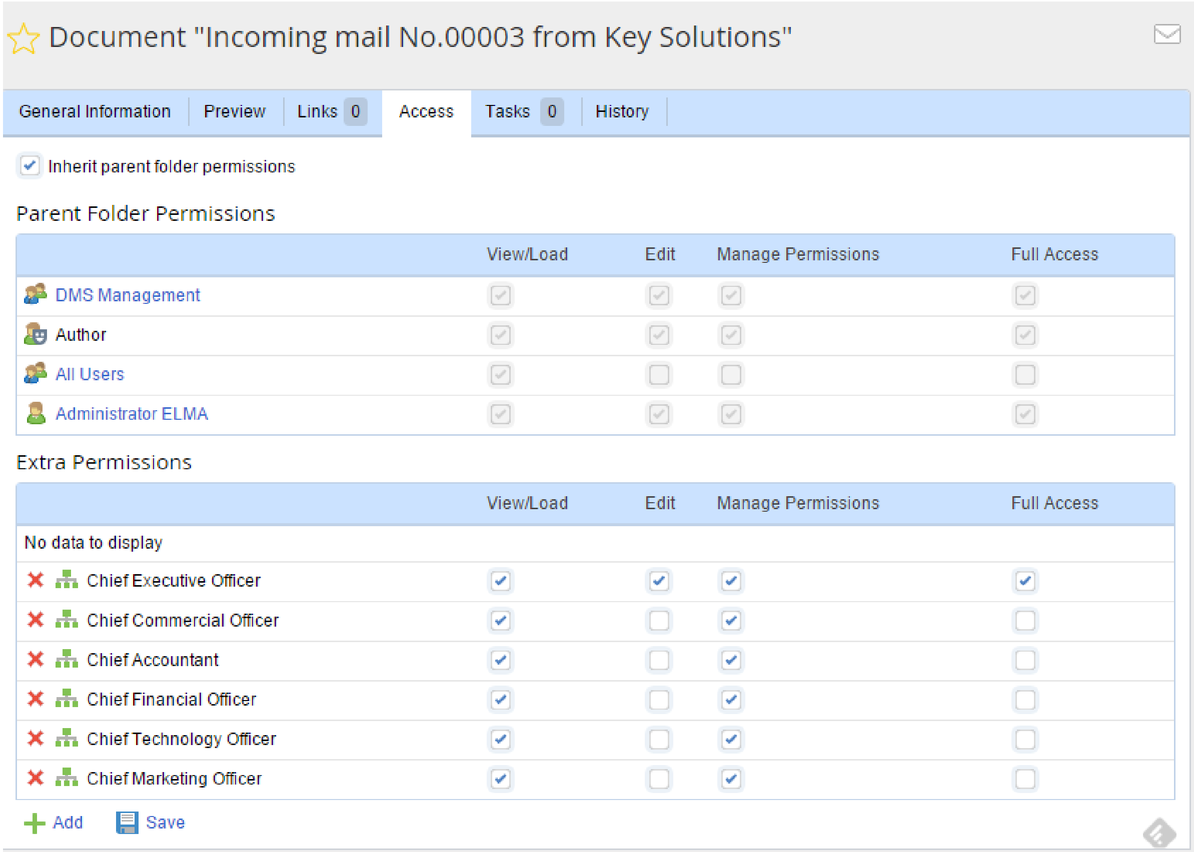


Fig. 103. Document page. Access tab.

A document's access permissions are managed similarly to those of a folder.

Users with **View/Load** and/or **Edit** permissions can open the **Access** tab only for reading.

A document can be created with a set of default permissions (permissions previously specified in the document type). In this case the document will have access permissions other than the ones inherited from the parent folder.

Apart from the **Access** tab, access permissions are managed:

- When a document is sent for acquaintance or approval;
- When a document-related task is created;
- In routing processes and business processes where the document is involved.

When you send a document for acquaintance, approval or attach it to a task, one of the executors from your list might not have the rights to **View/Load** the document. In this case, **ELMA** will offer to give them the corresponding permissions (Fig. 104). Once set, click **Save Permissions**.

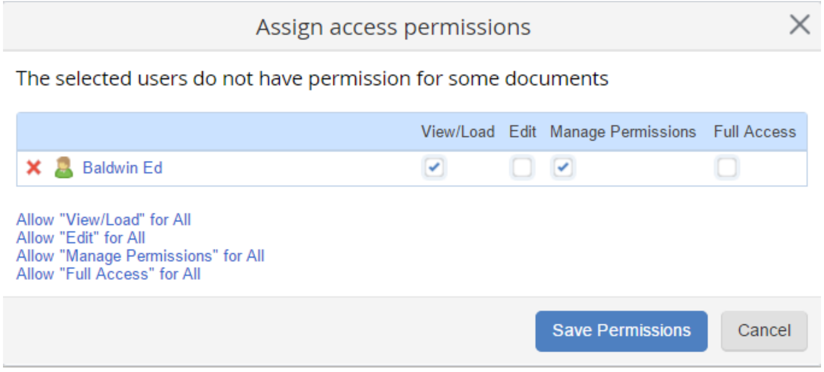


Fig. 104. Access permissions dialogue box

3.4.4 Document Type Settings

The system administrator can manage general document type settings in **Administration → Document Management → Document Types** (Fig. 105). Each document type is managed separately.

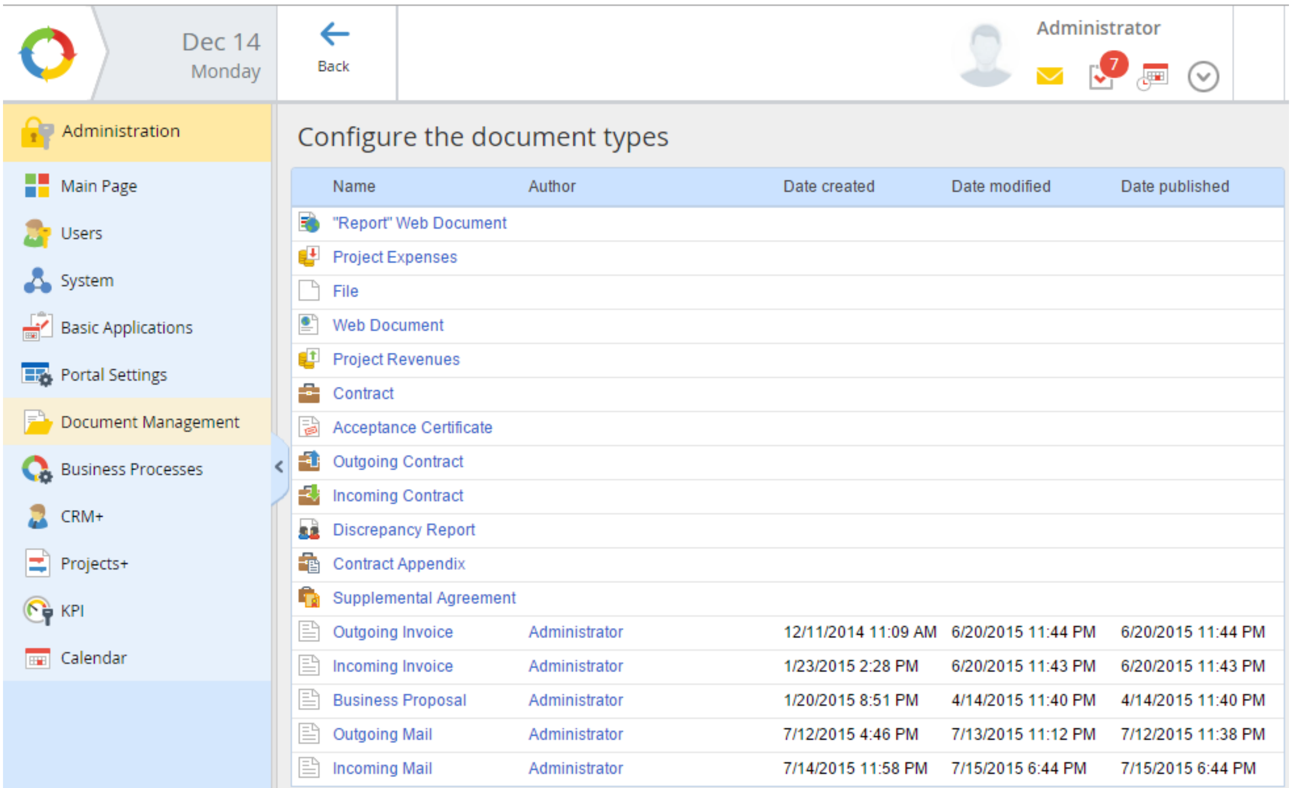


Fig. 105. Administration → Document Management → Document Types.

As an example, configure the **Incoming Mail** document type. To start, click on the document type's name in the current section. The configuration page contains several tabs (Fig. 106).

Let's apply the following logic for creating and assigning access permissions: any user can create an incoming letter or an e-mail message, which is then stored in **Shared Folders**, in the **Incoming Mail** folder. After creating an electronic document, the author can edit the document and give access permissions to other users. All the executives must have access to **View/Load** and **Manage Permissions**. The secretary must have **Full Access** to all incoming documents. All the other users must be able to see the letter or e-mail message only if they are assigned with a task, related to this letter or e-mail.

Implement this logic in configuring the **Incoming Mail** document type as shown in Fig. 106.

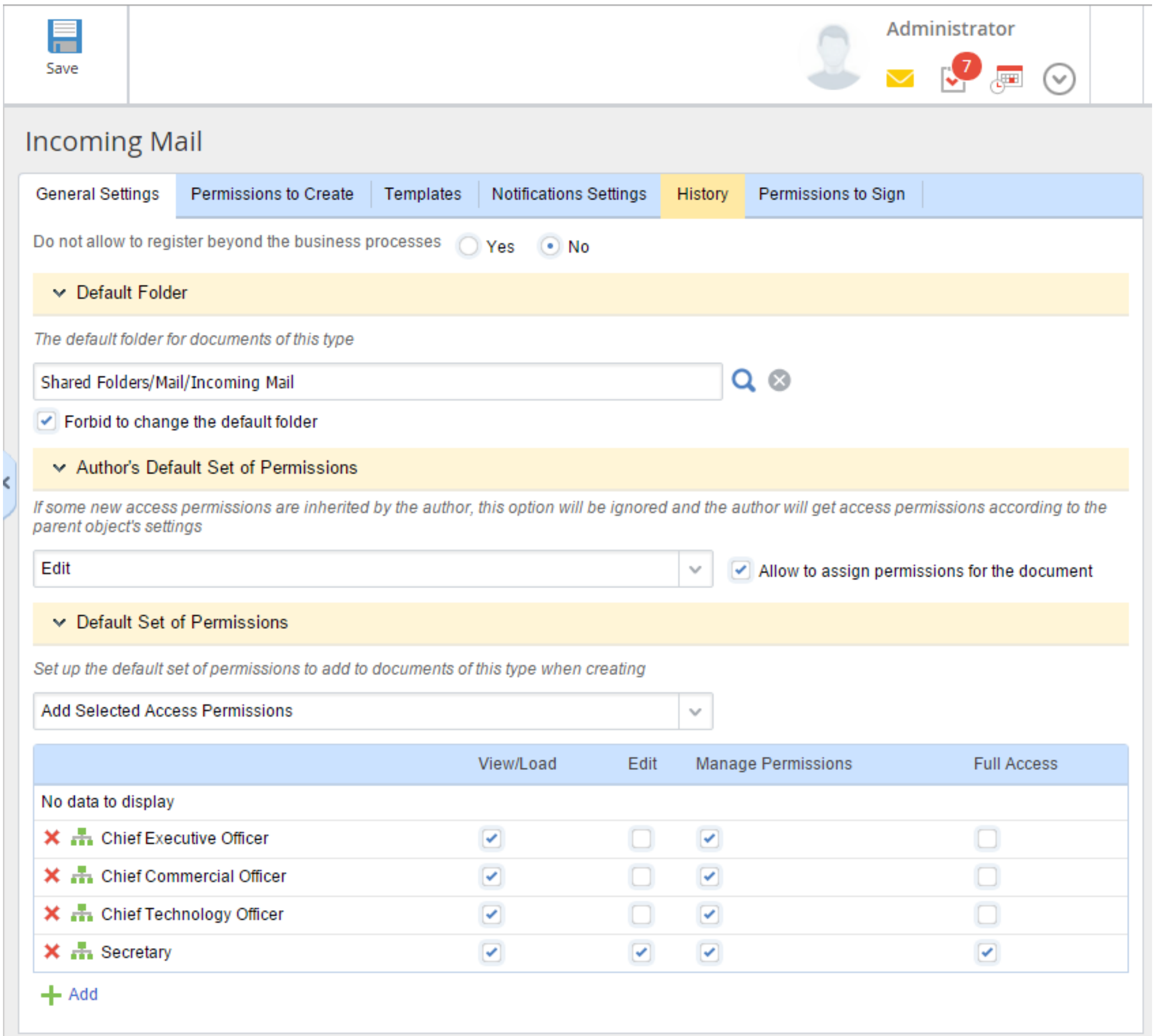


Fig. 106. General Settings of the Incoming Mail document type

The next tab, **Permissions to Create**, specifies those users who can create documents of this type in **ELMA**. By default, all the users are allowed to do that. For some document types (for example, contracts, invoices or other financial documents) you can limit the number of users with this privilege. For Incoming Mail, leave the default settings.

In the **Templates** tab, add templates for automatic generation of documents of this type. See Chapter 9 and **ELMA Help** for more information on creating and using templates.

In **Notifications Settings** select users who will receive notifications about actions or changes made to the document. This is called subscription to a document. **ELMA** generates a large number of notifications, consider it when subscribing users to the current document. Add the Secretary to the list of users who receive notifications about changes made to incoming mail.

The **Permissions to Sign** tab specifies the users who can sign documents of this type. For these users, the **Sign document** option is added to the document's page. It becomes available in the **Actions** button drop-down menu. By default, this list is empty. Incoming mail does not require a signer. For outgoing mail, however, you will need to specify this list.

Click **Save** to save the settings. Later, you can modify the document type settings whenever you want.

3.5 Modeling a Route for Incoming Mail

Document routing is a type of process consisting of a sequence of tasks with the document performed by different executors. Modeled document routes increase the quality of document management. They allow you to track the document progress at any moment of time, set up schedule compliance and so on.

Routes are created in **ELMA Designer** and are assigned to a certain document type.

Let's learn to create document routes in **ELMA ECM+**, taking **Incoming Mail** as an example.

Model the route according to the following legend:

Any user can receive an incoming letter or e-mail. Once they receive it, they have to introduce it into **ELMA** (capture the document) and send it to the secretary for registration. After the document is registered, the secretary sends it for consideration to one of the Chief Officers (CEO, Chief Commercial Officer, or Chief Technology Officer). The secretary chooses who will consider the document and who will get acquainted with it. The person responsible for making a decision on the document can change the list of users who must get acquainted with it. He or she can also assigns tasks to other users. This is called document movement. It is possible to send the document for acquaintance to any list of users. Once the document-related tasks and the acquaintance task are completed, work on the document is considered accomplished. The document's route must include automatic updating of life cycle statuses.

The document routes are modeled in **ELMA Designer** just like any business process (see **ELMA Help** and **ELMA BPM Platform** quick-start manual). There is a difference though: a route always requires a context variable with a document type, and uses a lot of **Document Management** modeling elements.

To create a document route, start by creating a new process in the Processes tab of **ELMA Designer**. Title it "**Incoming Mail**". The second step is to create **Swimlanes**, but skip it for now, we shall get back to that later. Now you have a draft of your route.

First, you have to add the context variable to the rout. Go to the **Context** tab of your process page and create the following variables:

- **Incoming mail** – **Incoming Mail** type (Fig. 107), input (Fig. 108);
- **Responsible** – **User** type with a limited user selection list (only Chief Officers) (Fig. 109);
- **List of users acquainted with the document** – **User** type, **List** link type.
- **Initiator** – **User** type.

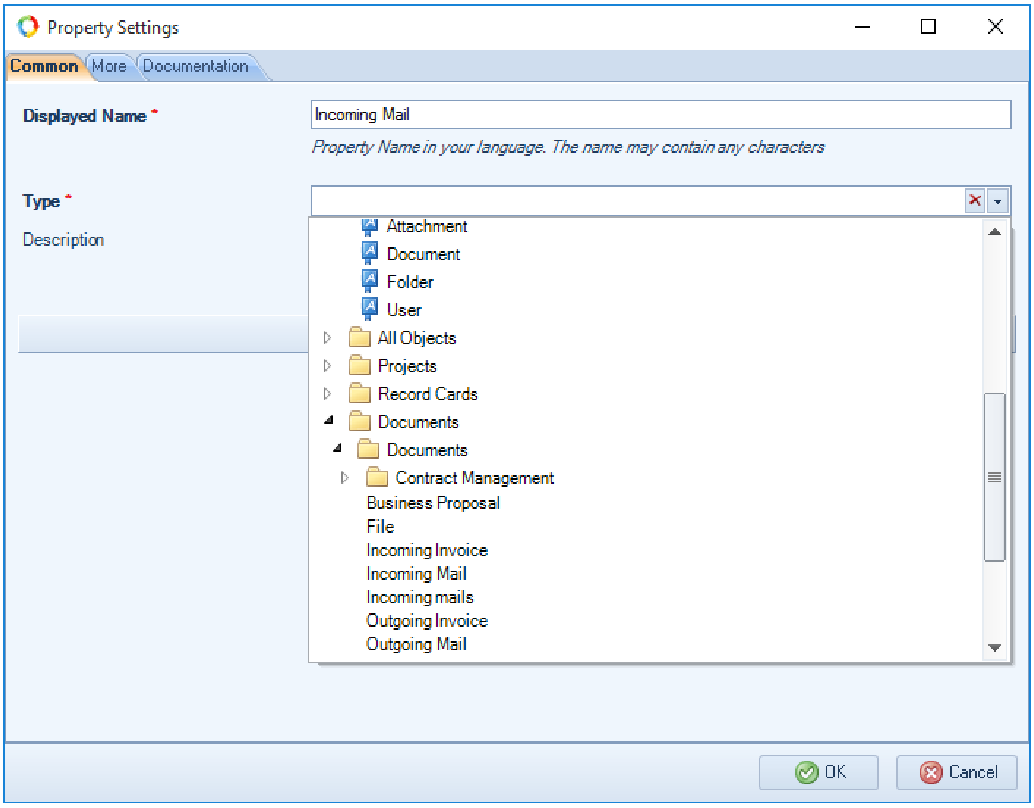


Fig. 107. Property settings for Incoming Mail. Common tab.

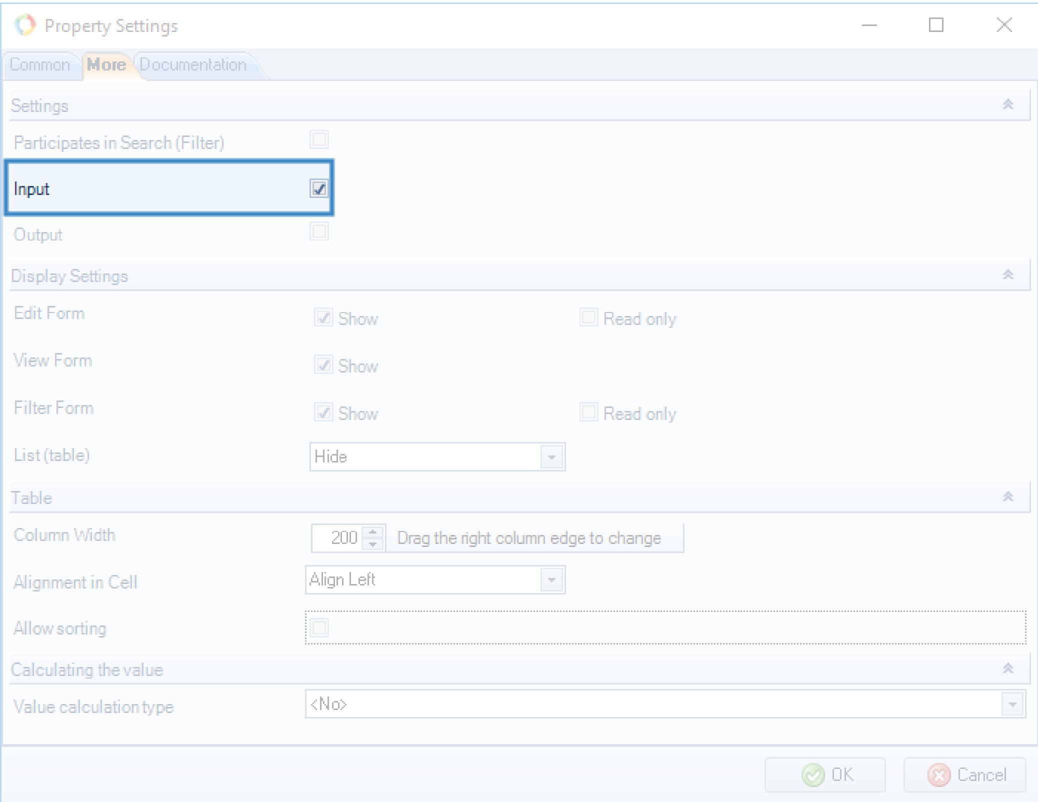


Fig. 108. Property settings for Incoming Mail. More tab, Input option.

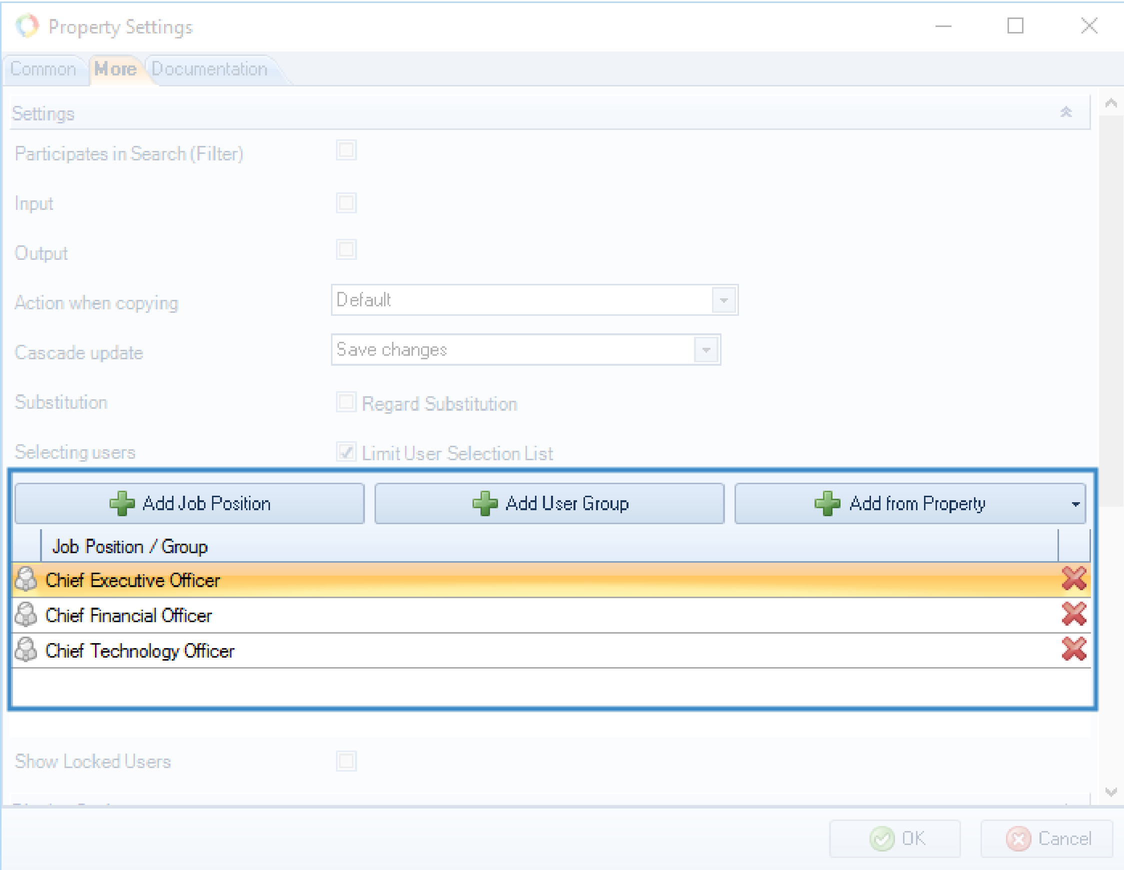


Fig. 109. "Responsible" property settings. Limiting user selection.

After you add all the context variables, the **Context** tab of your Incoming Mail process will look as shown in Fig. 110.

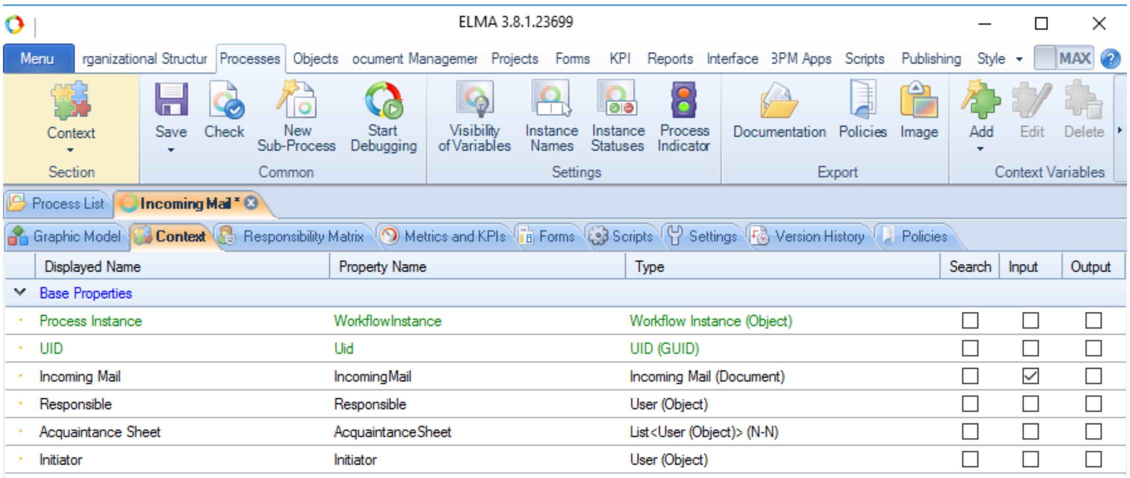


Fig. 110. Context tab of the Incoming Mail routing process.

Your next step is to set automatic naming of route instances. All the active Incoming Mail routes will be named as follows: the word "Route" + the document's name.

Here is how it is set up: when you click **Instance Names** in the process page toolbar (Fig. 111), the **Instance Naming Method** window appears. Select **Template** and create a naming template. Type “Route” in the template field, then add a document name through the **Insert Variable** button.

Click **Insert Variable** then select **Context** → **Incoming Mail** → **Name** (Fig. 111). The template field will then display the following text *Route {$Context.IncomingMail.Name}*. It will define the document’s name when the route is started and will be displayed in the route instance name. Click **OK** in the **Instance Naming Method** window to save the changes.

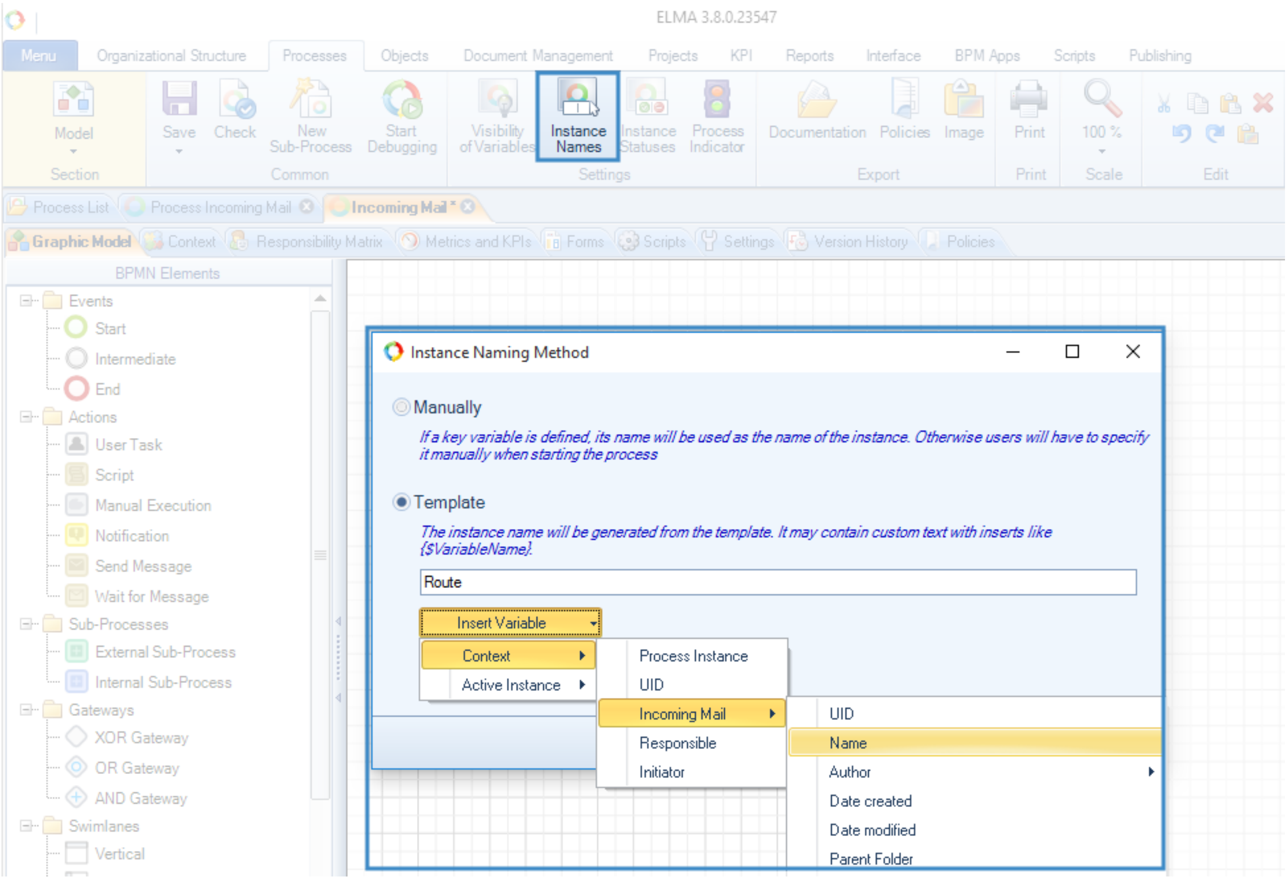


Fig. 111. Instance Name button and Naming settings.

When you have set the context variables and instance names, go to modeling the route map for **Incoming Mail**.

3.5.1 Swimlanes

Configure the swimlanes. To add a swimlane, go to the **Graphic Model** tab in the process page and drag the BMPN Element **Vertical** swimlane into the empty filed on the right.

Add five swimlanes and configure them (Fig. 112).

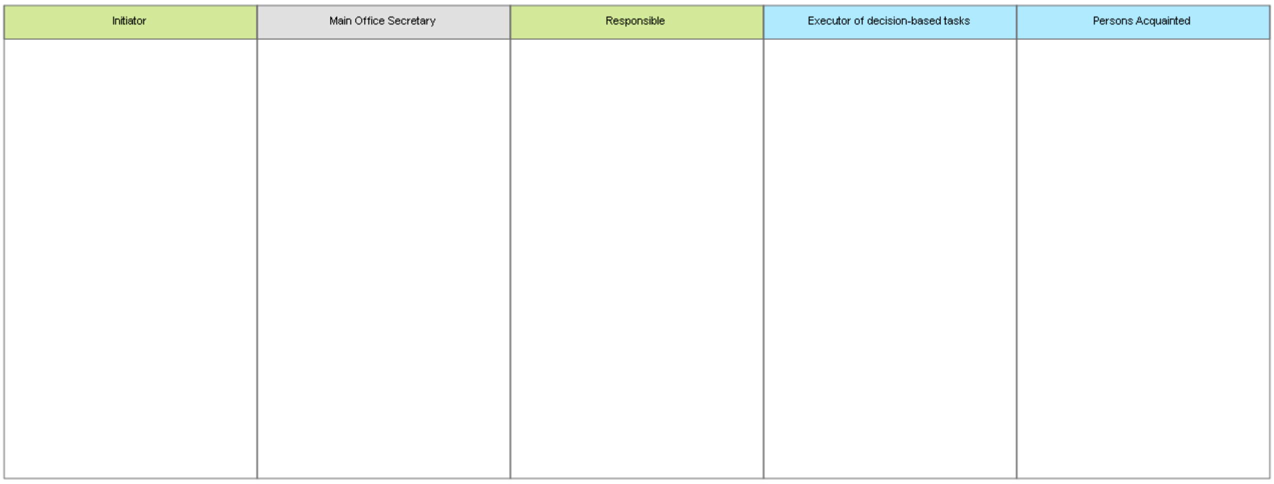


Fig. 112. Swimlanes of a document routing process

Initiator is a dynamic swimlane. As the executor variable, select the previously created **Initiator** context variable. Since any user can be the initiator, select the **All Users** group in the list of job positions.

Main Office Secretary is a static swimlane. In the organization structure, select the executor, the job position of the person responsible for registering incoming documents in the company. In the **Access Permissions** tab set automatic distribution of **Full Access** to the Secretary.

Responsible is a dynamic swimlane. For the executor variable, select the previously created **Responsible** context variable. In this swimlane, the executor makes a decision on the document and assigns tasks. The list of executors is limited to Chief Officers only. In the **Access Permissions** tab, set automatic distribution of **Reading/loading** rights to the executor.

The following two swimlanes, **Executor of decision-based tasks** and **Persons Acquainted** are of a specific type, **Business Role**.

The **Business Role** swimlane is used for document management. It allows the process flow to send a document for acquaintance, approval or task execution to several users at once.

With just a single block of the Graphic model (**Approval**, **Acquaintance** or **Consideration**), you can at once set several tasks of one kind to various executors. The process is suspended until each executor has accomplished their tasks. Then the process becomes active again. Unlike other swimlane types, **Business Role** can set one task to several executors.

There are three **Business Role** types: **Acquaintance, Approval, and Consideration.** For more information on them, see **ELMA Help**.

For the **Executor of decision-based tasks,** change the swimlane type to **Business Role,** then change the **Business Role Type** to **Consideration** (Fig. 113). In the **Access Permissions** tab set automatic distribution of **Reading/loading** rights.

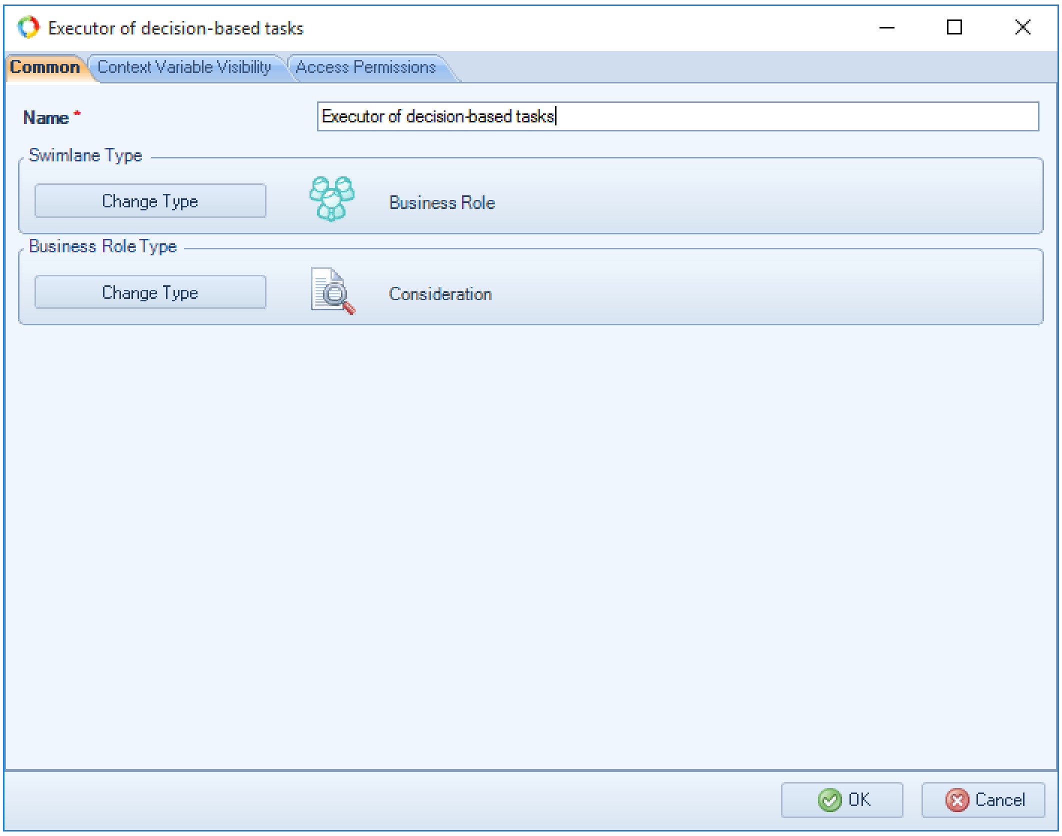


Fig. 113. Setting the "Executor of decision-based tasks" swimlane.

Set the **Persons Acquainted** swimlane type as in Fig. 114. In the **Access Permissions** tab set automatic distribution of **Reading/loading** rights.

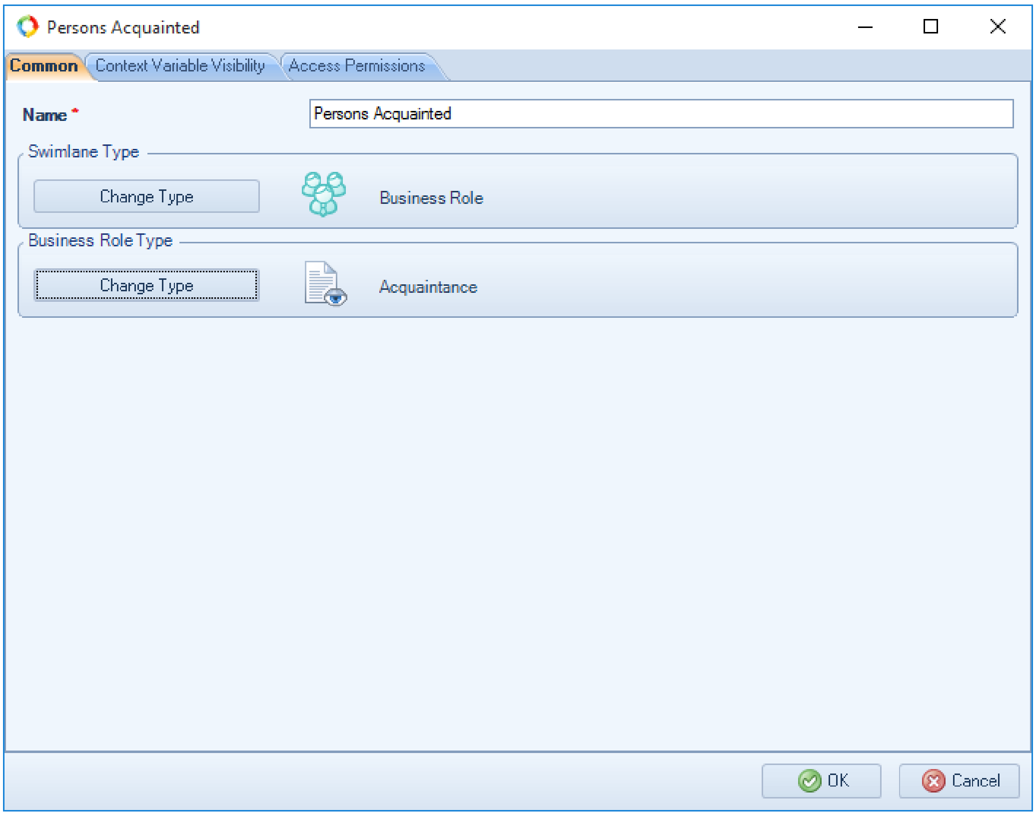


Fig. 114. Setting the "Persons Acquainted" swimlane.

In business processes and routes, you can set access permissions for documents during modeling, when setting up swimlanes. In the **Access Permissions** tab you can enable automatic distribution of rights to executors of the current swimlane (Fig. 115). You can also use scripts to manage access permissions to a document (see **ELMA Help**).

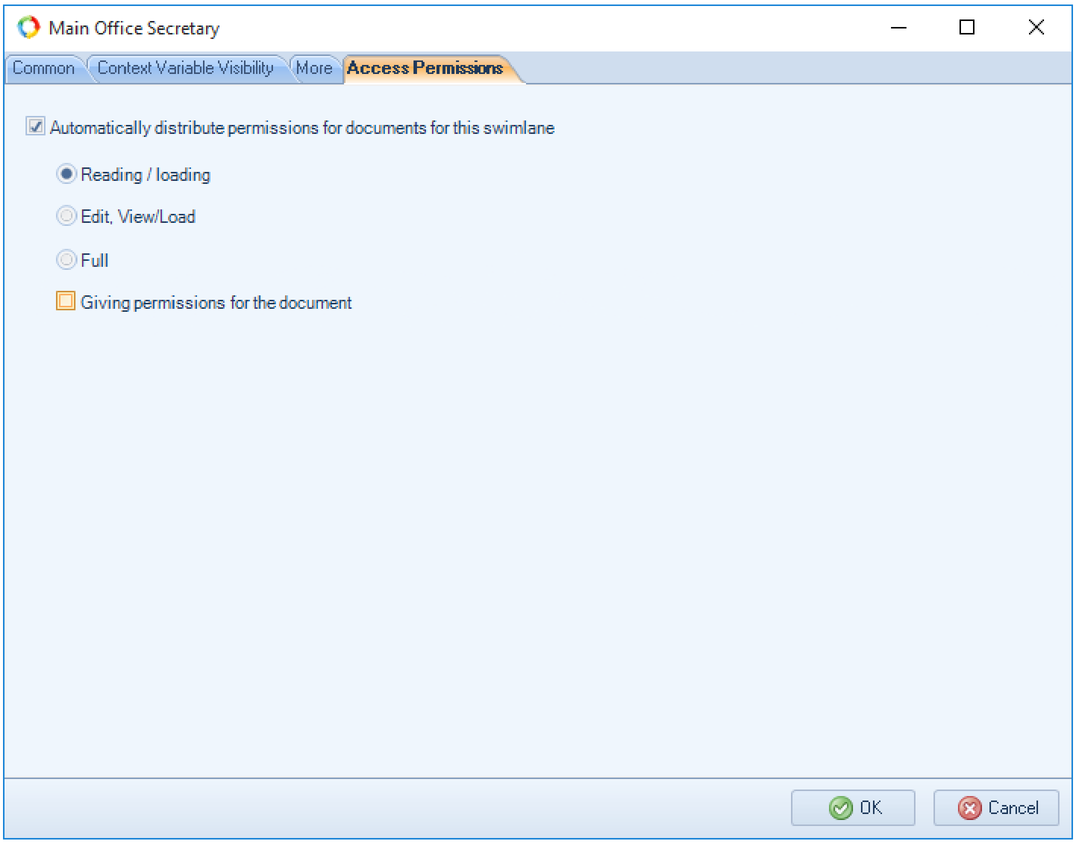


Fig. 115. Setting automatic distribution of permissions in a swimlane

For reassigned tasks you can configure permissions in **Administration** → **Document Management** → **General Settings for Document Management Section**. Set the "*If a document task is reassigned, automatically set permissions for attached document*" option to **Yes**.

When all the swimlanes are configured, the document routing map will look like shown in Fig. 112.

Now you have to model the **Incoming Mail** route itself.

3.5.2 Document Management Activities

Use the specific **Document Management** activities to model the document route. They are located in the **Document Management** section, on the side panel of the **Graphic Model** tab (Fig. 116).

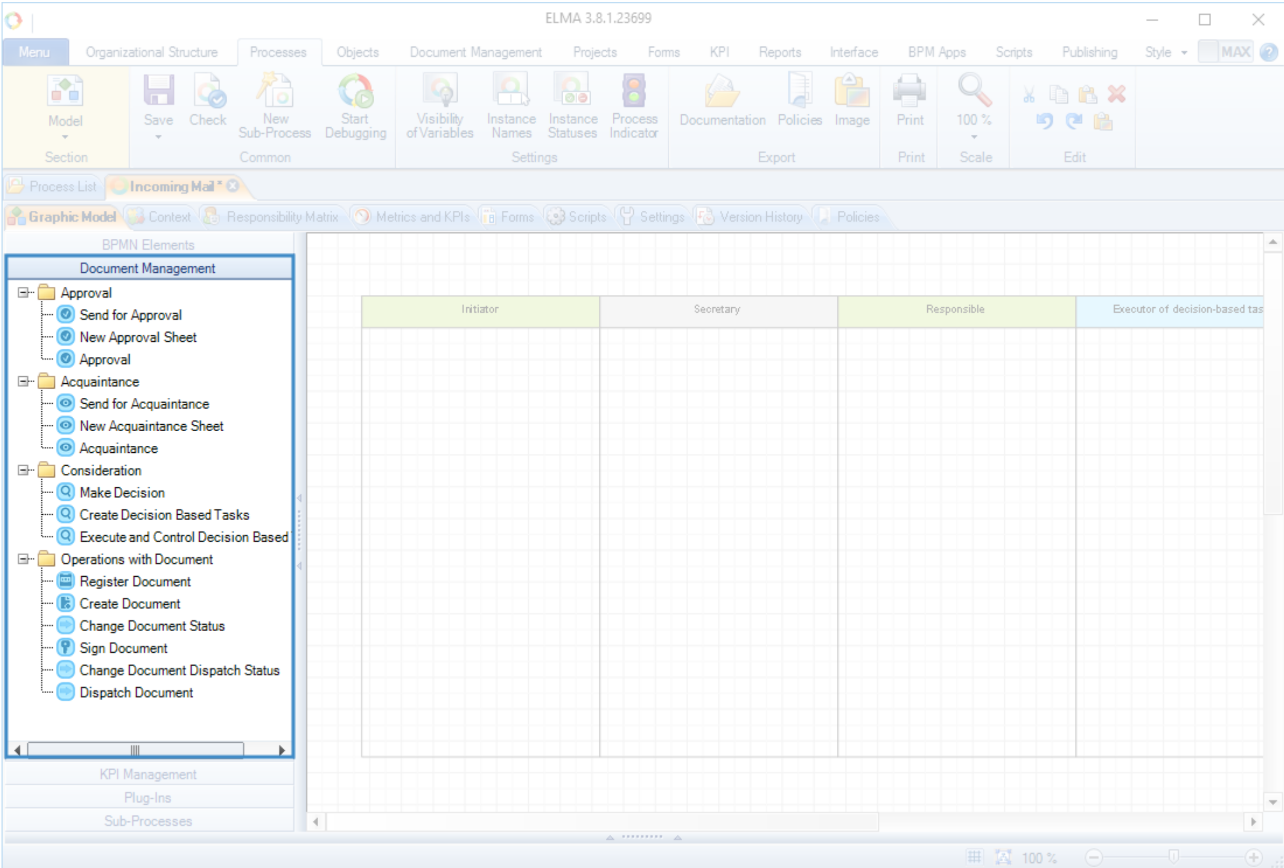


Fig. 116. Graphic model tab. Document Management operations

These activities always require a context variable with a document.

All document management activities are divided into 4 groups:

- Approval;
- Acquaintance;
- Consideration;
- Operations with Document.

For the Incoming Mail route, you will need the **Acquaintance** and **Consideration** activities as well as some activities from the **Operations with Document** section. To learn more about other document management activities, see **ELMA Help**.

It is possible to create a document outside a route and then assign it to the route. Or you can create the document in the route itself. From the very beginning you have to specify how the routing process will start.

Suppose, a document is created in **ELMA Web Application** and then the user directs it by the route. Model the route according to the abovementioned legend.

In the **Initiator** swimlane, place the Start event. Then add a user task to confirm sending the document by the route. Also provide the possibility to end (cancel) the process at this point. Then, the **Main Office Secretary** must register the document ("Register Document" activity) and select the responsible to consider the document. The **Responsible** makes a decision and assigns document-related tasks to other users ("Make Decision" activity). Add the "Execute and control decision tasks" activity to the **Executor of decision-based tasks** swimlane. Add the "Acquaintance" activity to the **Persons Acquainted** swimlane.

In the Graphic Model section of your process, drag the required elements to the process map and link them with connectors (Fig. 117).

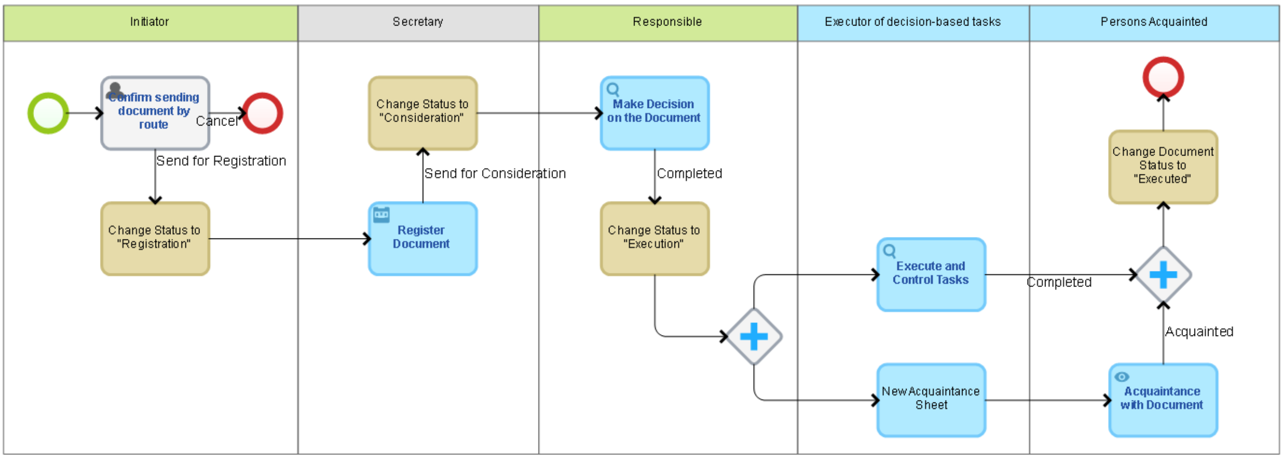


Fig. 117. Incoming Mail routing process with Document Management elements

Since task execution and acquaintance with a document can be done at the same time, use the AND Gateway.

Now learn how to configure the elements of the route's graphic model.

The first task, *Confirm sending a document by route*, allows you to cancel the document routing if, for example, you set if off by mistake. In the task form, select the **Incoming Mail** context variable with nested properties and select *Reading only* (Fig. 118). Further you will specify that the route can only be started from the document page.

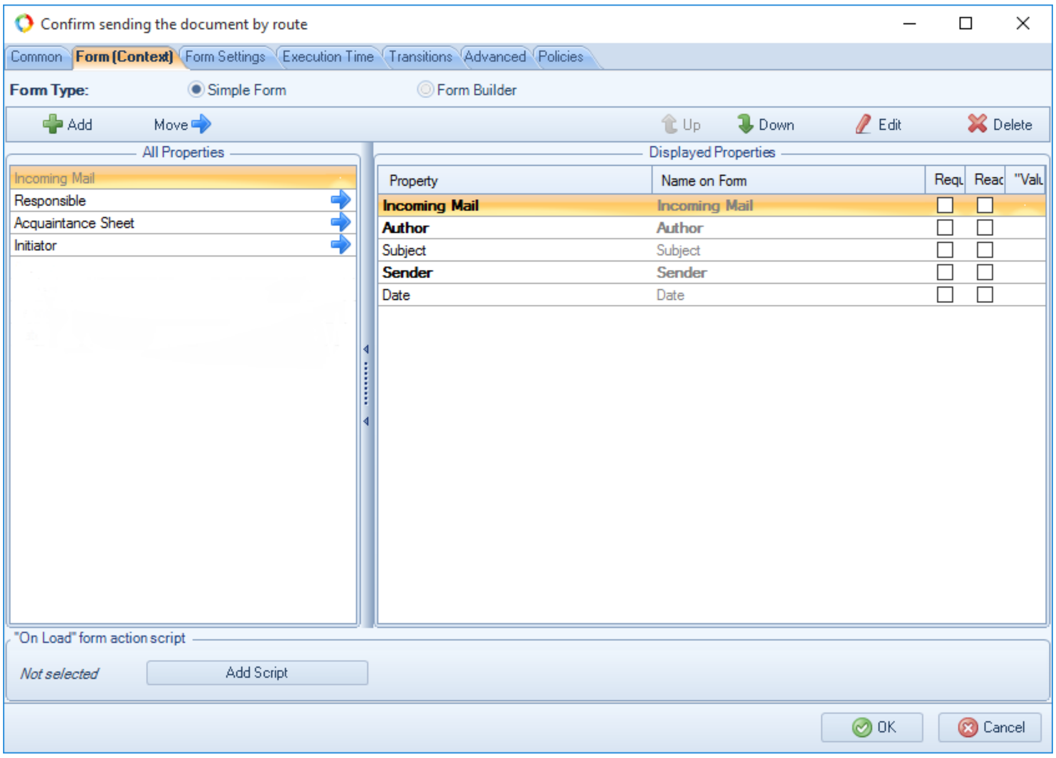


Fig. 118. Form (Context) tab of the “Confirm sending document by route” task

The **Change Document Status** activity is used for automatic status update according to the document’s lifecycle. This activity is not displayed in the **Web Application** when the document goes through the route and does not require any user actions. Our route model has four activities of this type. They differ by the status that they assign to the document when it reaches a certain point.

To configure the activity, double click on its shape in the process graphic model. The set up window opens (Fig. 119).

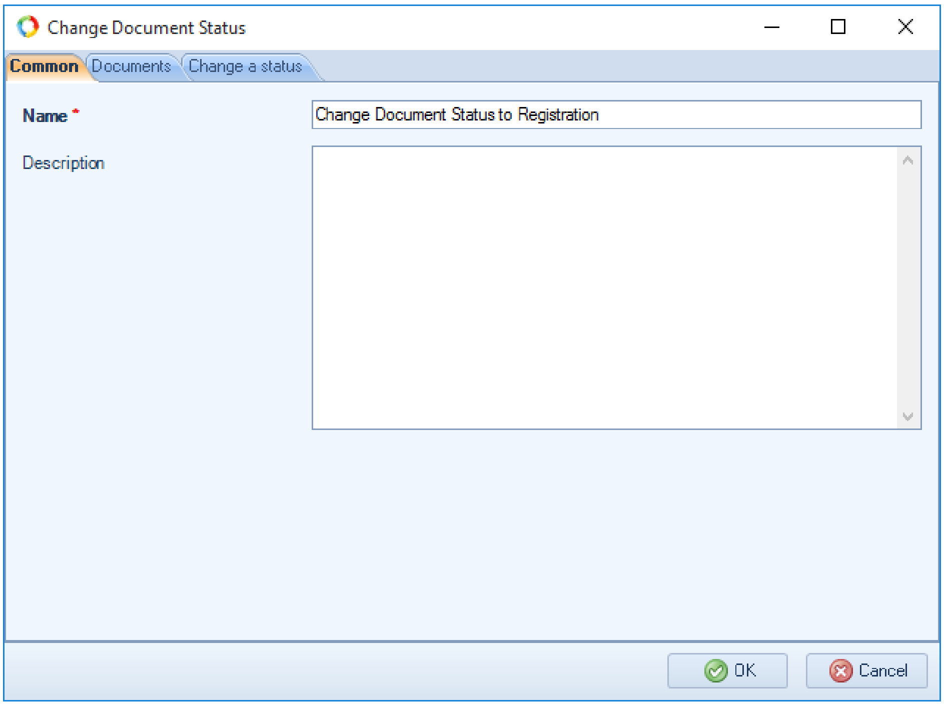


Fig. 119. Change Document Status window, Common tab

The **Common** tab allows you to change the activity name. In the **Documents** tab, you have to select the context variable that stores the document. In the **Change Status** tab, specify the status that the document acquire at this step of the routing process. To select a status, click on the link in the **Final status** column.

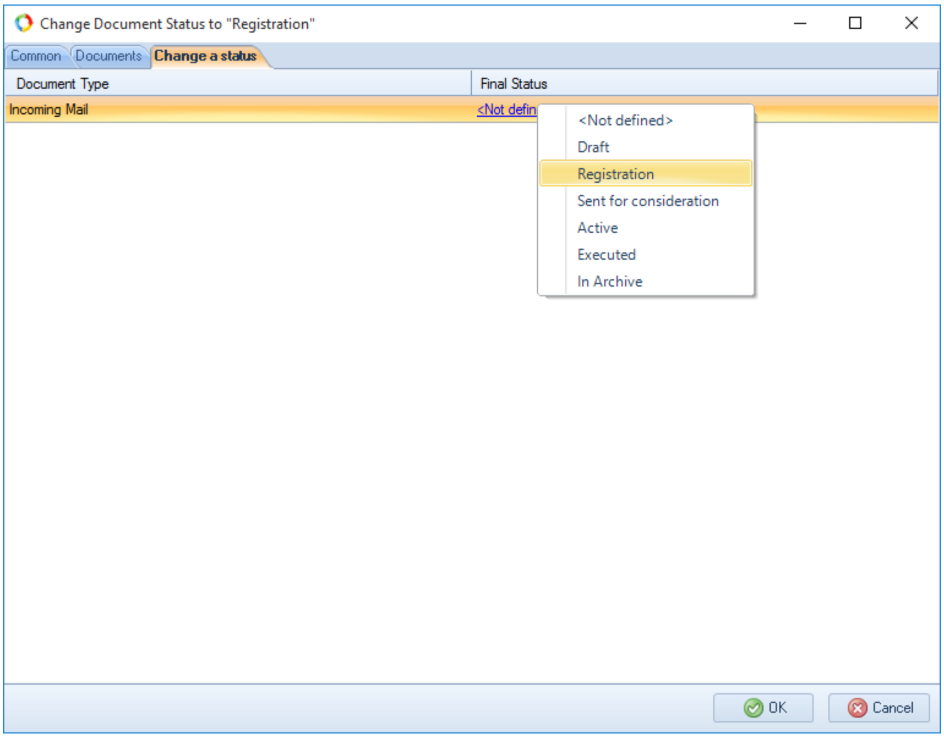


Fig. 120. “Change Document Status to Registration” window. Change Status tab

Now set up other **Change Document Status** activities.

The **Register Document** activity creates the **Register document** task in the **Web Application** which is similar to the registration page of an existing document (Fig. 121). This activity can be placed either in a static or a dynamic swimlane. Double right-click on the activity shape in the graphic model to open the configuration window.

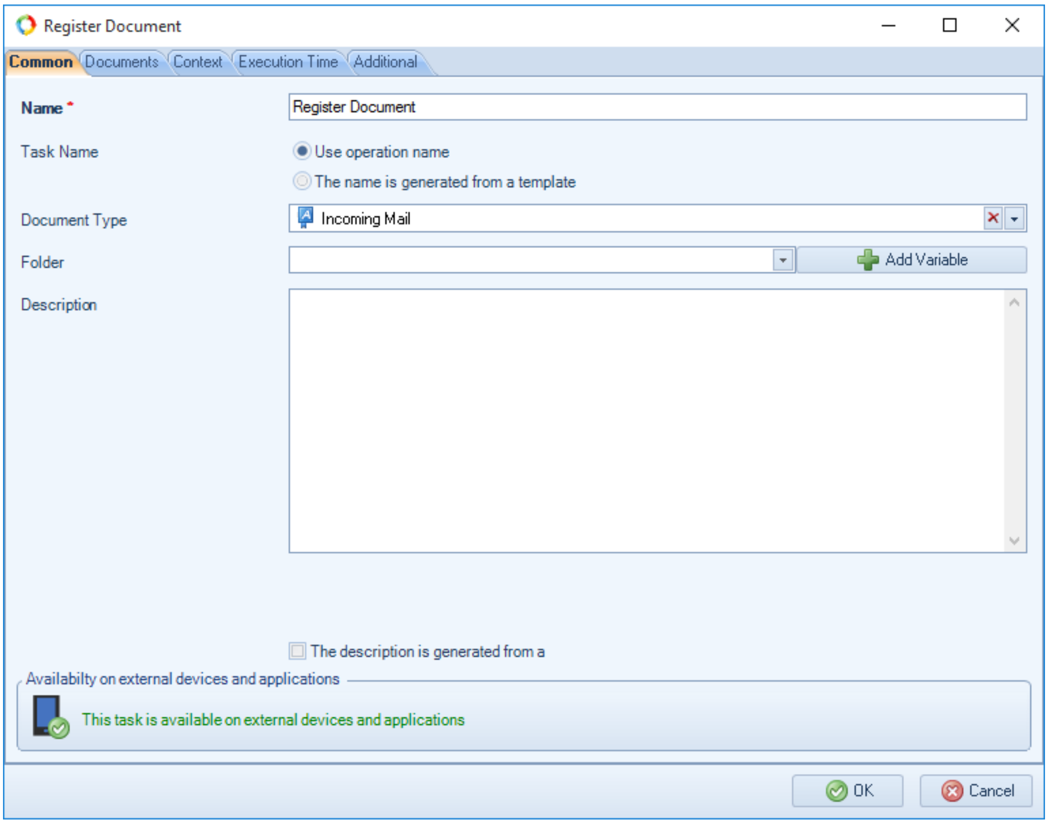


Fig. 122. Register Document activity. Common tab

In the **Common** tab (Fig. 122), you can change the task name and specify the **Document Type** to be registered. In our case, it is **Incoming Mail**. In the **Documents** tab, move the document variable from the process context to the **Selected Variables** column.

In the **Context** tab, select the properties that will be displayed in the task. In this route, the Secretary specifies the person who will consider the document, and prepares a list of users who should read the document. So, add the following properties **Responsible** (required) and **List of users acquainted with the document** (Fig. 123).

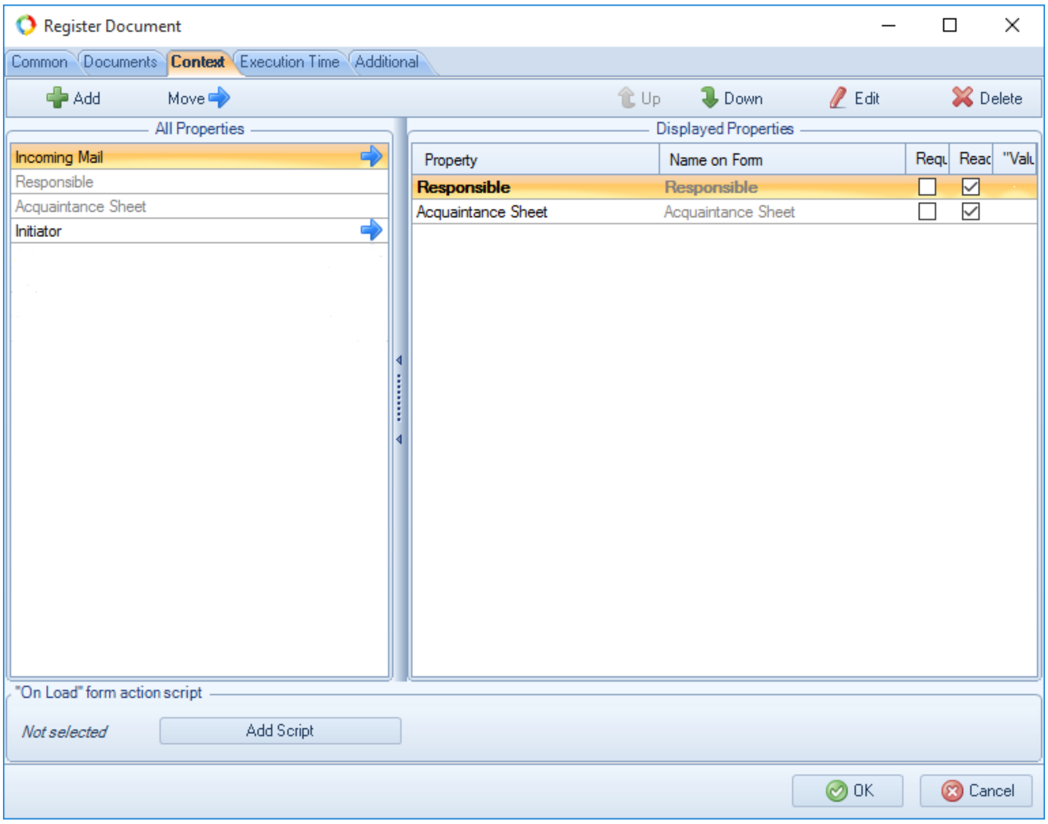


Fig. 123. Register Document operation. Context tab

In the **Execution Time** tab you can limit the time report for the task, just like you would do for a user task.

The **Additional** tab is used to set up document registration properties (Fig. 124). With the **Record card is recognized by** option you can specify how the Record Card is recognized, and select the document flow or Document Registration Variant. All this makes registration much faster. You have already set up the registration variant (section 3.3.3). Select it to make it easier for the Secretary to register a document. Also enable the **Automatically give permissions for registration office in the selected variant** option. This way you can avoid the situation when a user cannot register a document because they do not have permissions for the registration office (for example, if the employee is being substituted or the Secretary's access permissions are not configured as they should be).

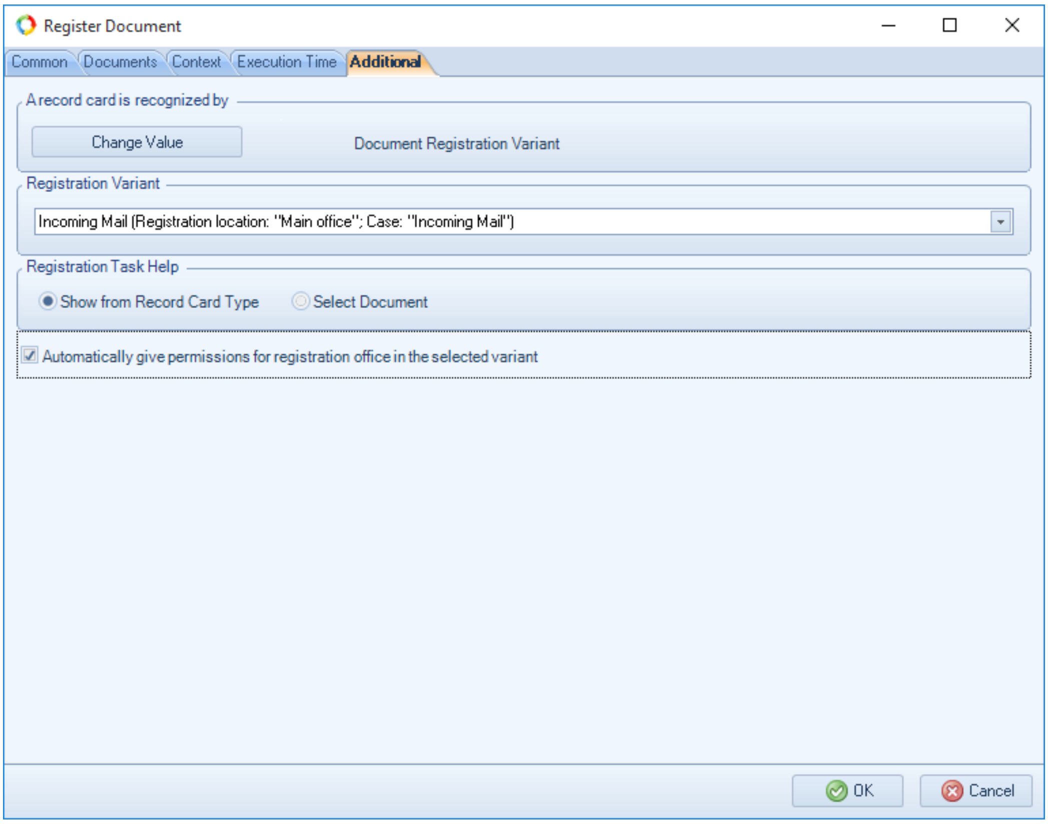


Fig. 124. Register Document operation. Additional tab

Configure the Register Document activity as shown in Fig. 122 - Fig. 124 and click **OK** to save the changes.

Make Decision on the Document. This activity opens a decision-making form in **Web Application**.

The **Common** tab allows you to change the task name. In the **Documents** tab, move the context variable that stores a document to the **Selected Variables** column. In the **Context** tab select **List of users acquainted with the document**. It is not the required field, so the person responsible can modify the list as necessary.

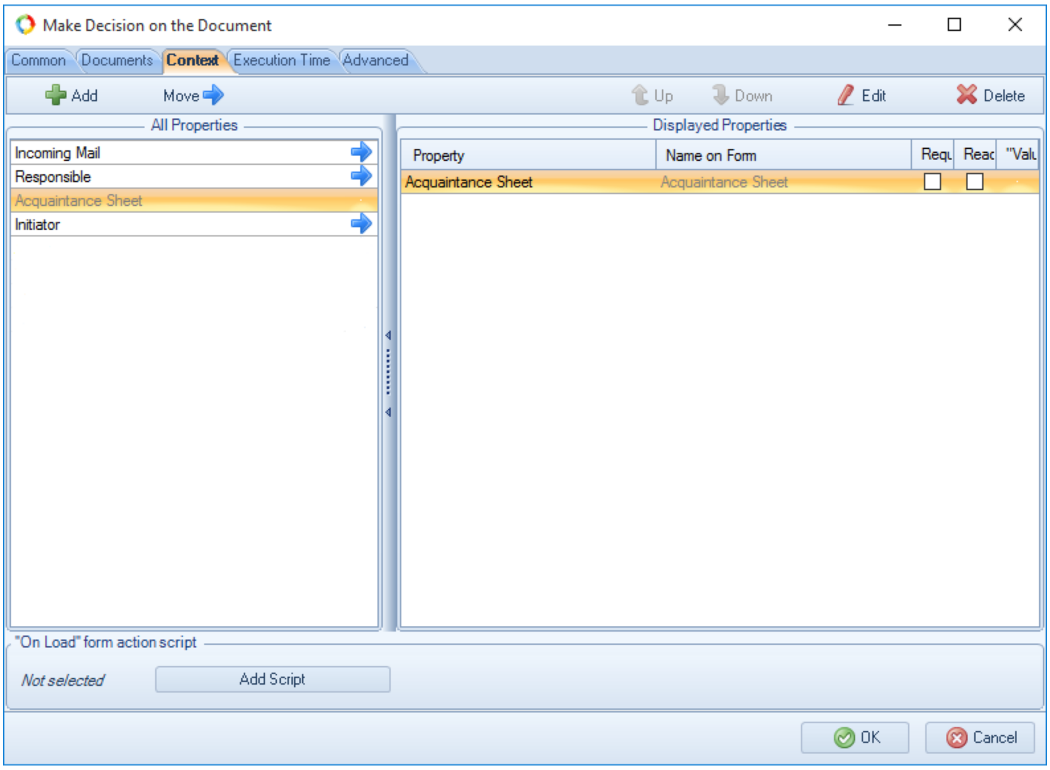


Fig. 125. Make Decision on the Document operation. Context tab

In the **Advanced** tab you can enable the **Allow to create tasks** option. When it is enabled, the decision form features the **Create tasks according to the decision on the document** section (Fig. 126).

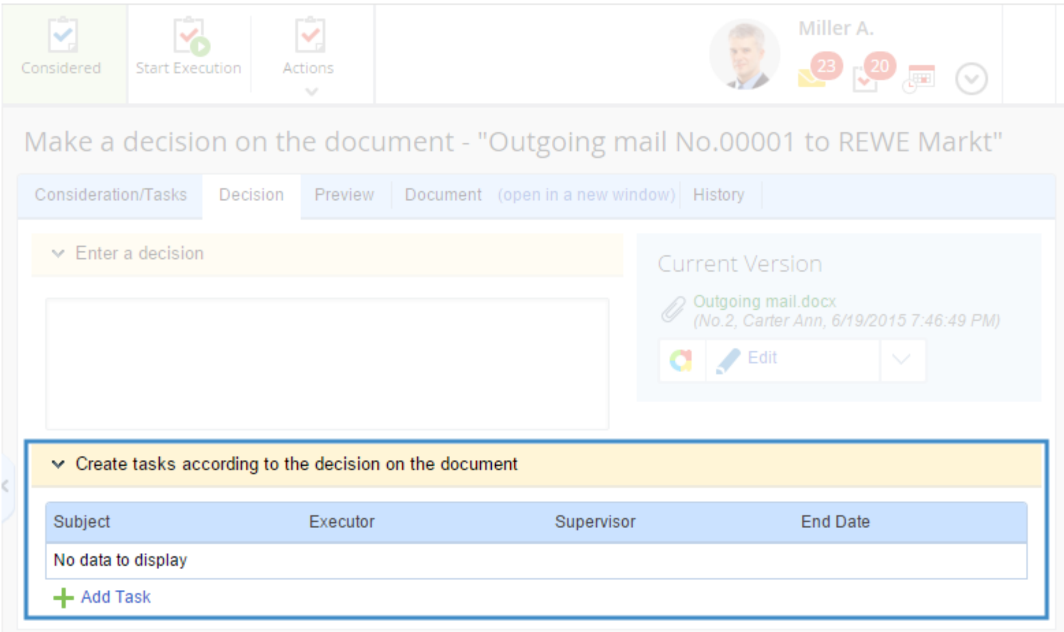


Fig. 126. Creating decision-based tasks in ELMA

This activity guarantees that all the decision-based tasks will be assigned to executors. The routing process will be suspended until all the tasks are completed and verified.

Execute and Control Tasks. Place this activity in the **Business Role** swimlane. The activity can be performed by several executors; they are specified when decision-based tasks are assigned. To set up this activity, go to the **Documents** tab and select the context variable of the document in question.

The **New Acquaintance Sheet** and **Acquaintance with Document** elements are related.

The generation of a **New Acquaintance Sheet** does not require any actions from the user. In our case, the list of users acquainted with the document must be created beforehand and specified in the **Acquaintance** activity. In the **Incoming Mail** routing process, the Secretary and the user responsible for the consideration of the document make the list, which is why all the elements of the list are specified. You can also use the **New Acquaintance Sheet** if the **Acquaintance** activity is located in the static swimlane where executors are defined according to the organization structure. To configure this activity, go to the **Documents** tab and select the context variable that the document stores.

If this list is not specified, then use the combination of the **Send for Acquaintance** and **Acquaintance** activities. The **Send for Acquaintance** activity must be placed in a static or dynamic swimlane, while **Acquaintance** must be placed in the **Business Role** swimlane. The executor whose swimlane features the **Send for Acquaintance** activity will receive a task to make a list of users who must get acquainted with the document.

The **Acquaintance** activity creates an acquaintance task in **Web Application**. You can configure this activity. In the **Common** tab you can change the activity name, write a description, add a list of users to the context variable, change the label (labels are described further down below), specify that acquaintance must be confirmed with a digital signature (**Require digital signature** option).

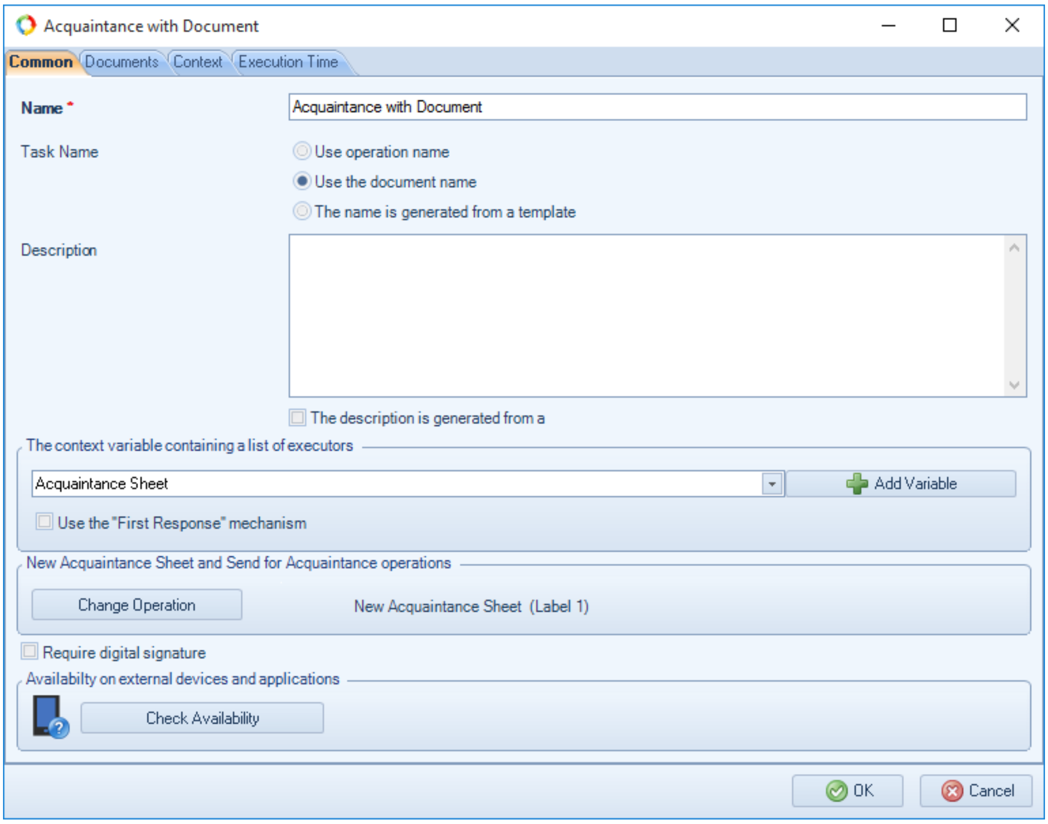


Fig. 127. Acquaintance with Document operation. Common tab

In a process, acquaintance can be done a lot of times. You need to link the **Acquaintance with Document** activity to either the **New Acquaintance Sheet** or the **Send for Acquaintance** activity (Fig. 128, Fig. 129). The system generates the label names, but they can be changed. In the **Acquaintance with Document** activity, select a corresponding label, *New Acquaintance sheet* or *Send for Acquaintance*.

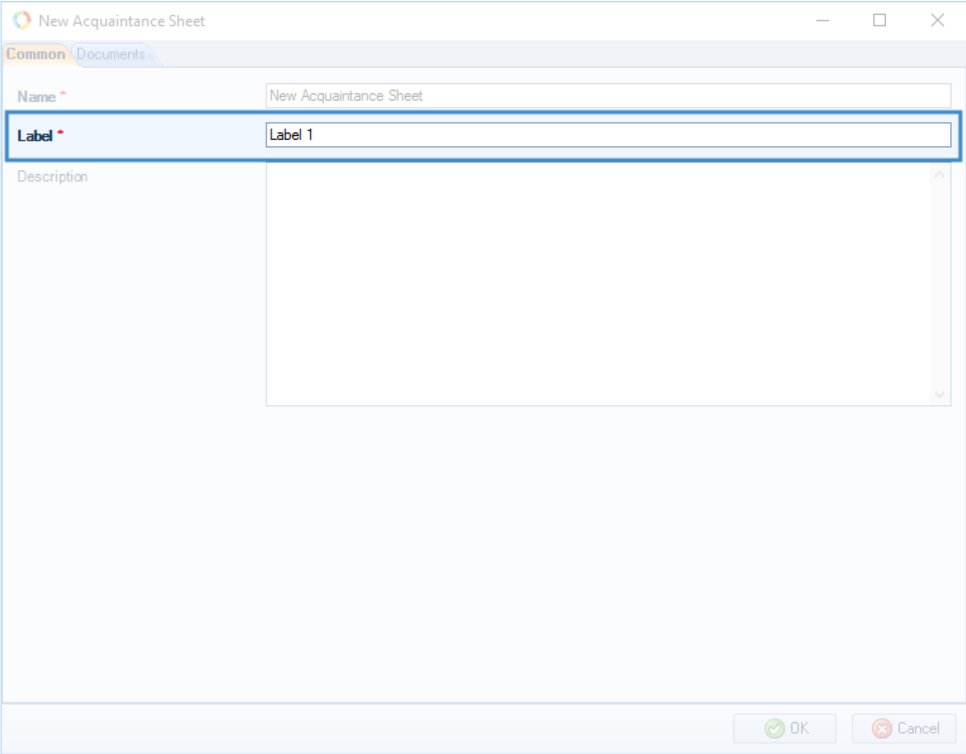


Fig. 128. New Acquaintance Sheet label

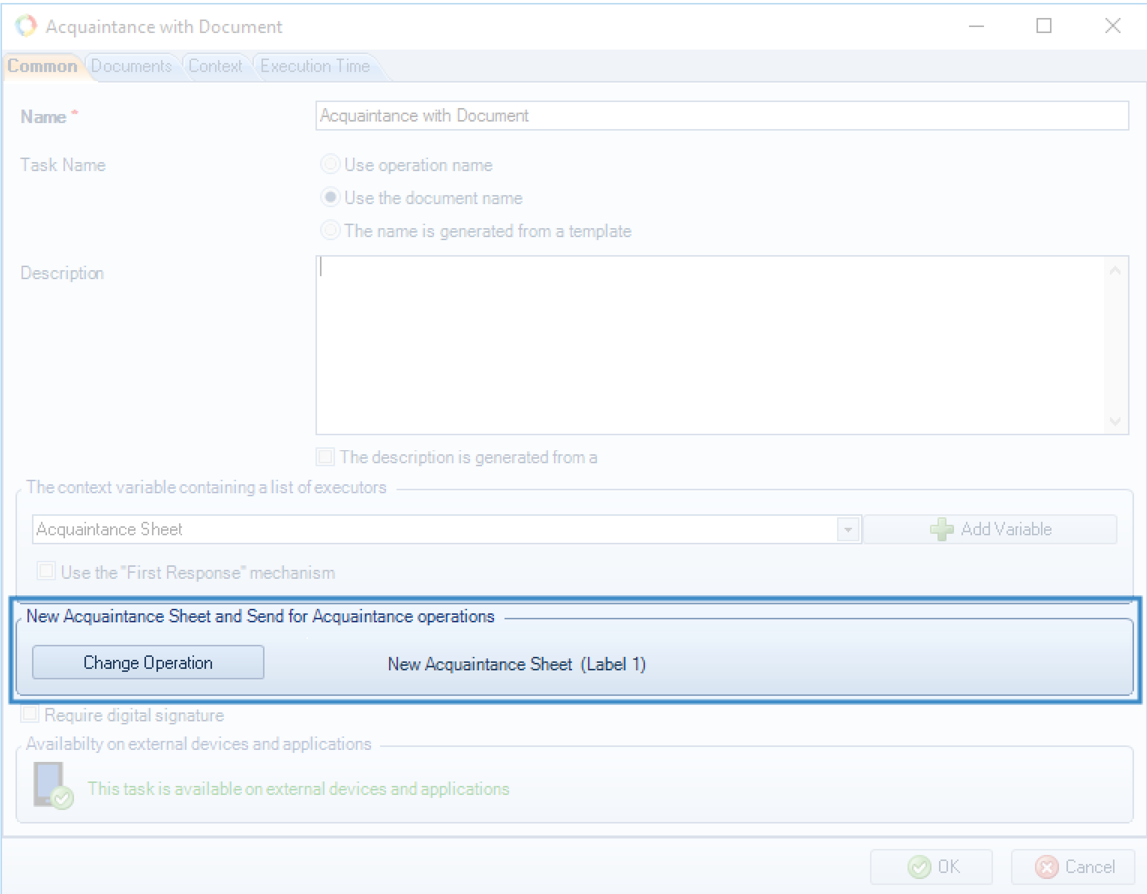


Fig. 129. Selecting a label in the Acquaintance with Document element

In the **Documents** tab you have to select a context variable with the document for acquaintance (**Incoming Mail** in our case). In the **Context** tab you can specify the properties that the user will see in their task page, and specify the document itself (for the current route, it is not necessary). In the **Execution Time** tab you can limit the time given to get acquainted with the document.

In this chapter we have only reviewed those document management activities that are used in the **Incoming Mail** routing process. To learn about other activities, go to **ELMA Help** or **Knowledge Base**.

3.5.3 Publishing Routing Process

Once the graphic model is configured, the route is created. You need to publish the route to make it executable in the **Web Application** and bind it to the document type. You also need to publish it to apply any changes that you have made.

ELMA executes route instances in accordance with the published model. If at the moment of publication there are active route instances, they will be completed according to the old version of the model.

To publish, click **Publish** in the **Save** button drop-down menu (Fig. 130).

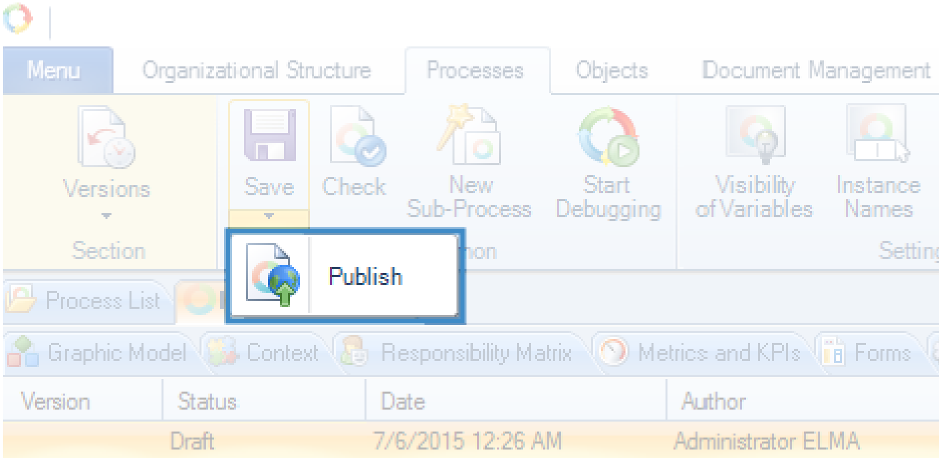


Fig. 130. Publish button in the routing process toolbar

The publishing window will appear, providing the serial number of the published version and featuring the process start variants. You can also briefly describe the new route's specifics (Fig. 131). This description will be visible in the **Comments** column of the route's version history. If you want the users to start the route from the document page ***only***, disable the **Manually** option in **Process Start Variants**. Click **OK** to confirm publication.

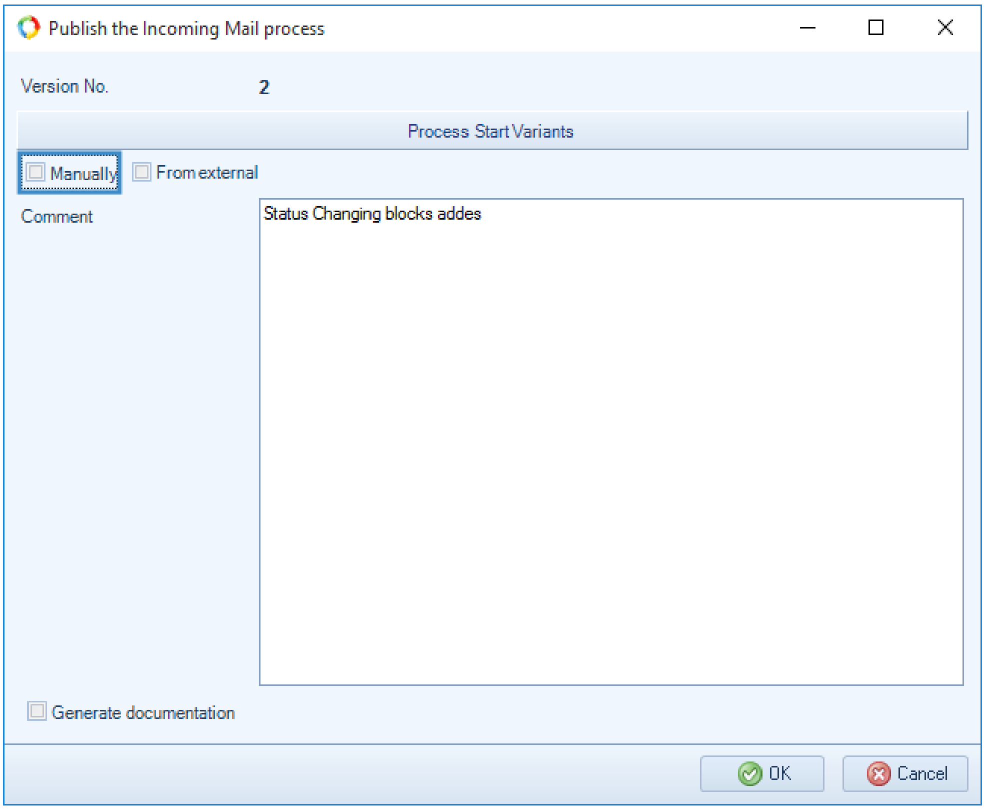


Fig. 131. Publication window, "Manually" option

Publishing will take a while. **ELMA** checks the route for errors and does not permit to publish a route if there are any.

Once the route is successfully published, you can launch it in **Web Application**. Bind the route to a document type to allow routing documents of this type from a document page.

3.5.4 Binding Route to a Document Type

You can bind routes to the document types in **ELMA Designer.** Go to the **Document Management** tab, open the document type page and the **Business Processes** tab. Then click **Add** in the toolbar to add the route (Fig. 132).

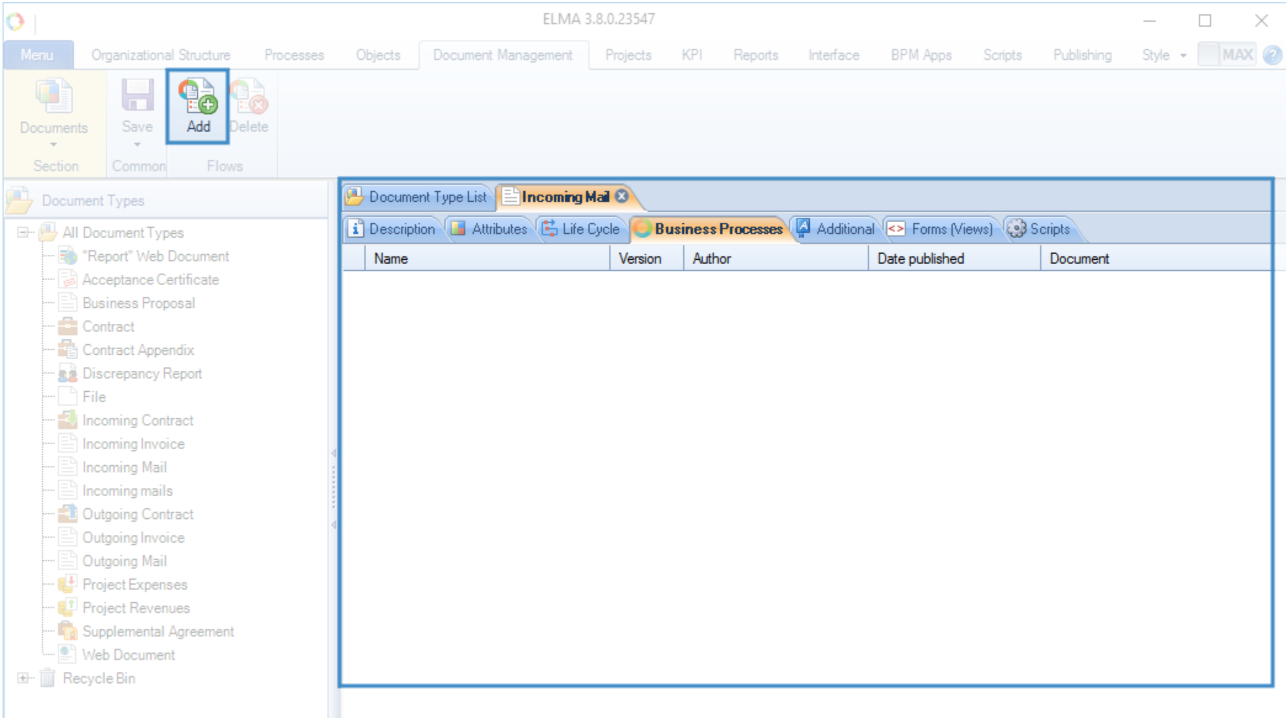


Fig. 132. Business Processes tab. Add button

In the window that pops up, select the required process (Fig. 133). The window only shows the processes whose context variable specifies the current document type.

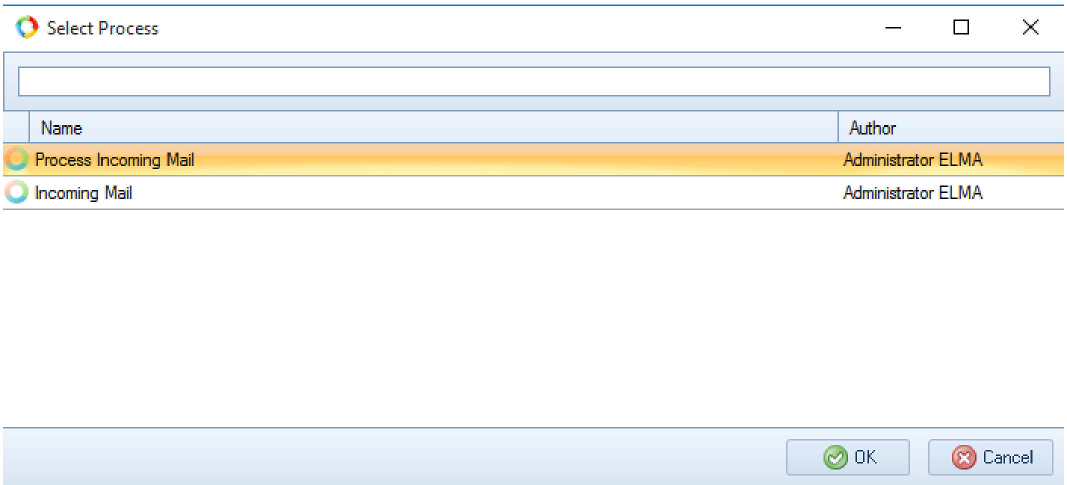


Fig. 133. Process selection window

Double left click on the route's name to add it. It will then appear in the list of processes available for the current document type (Fig. 134).

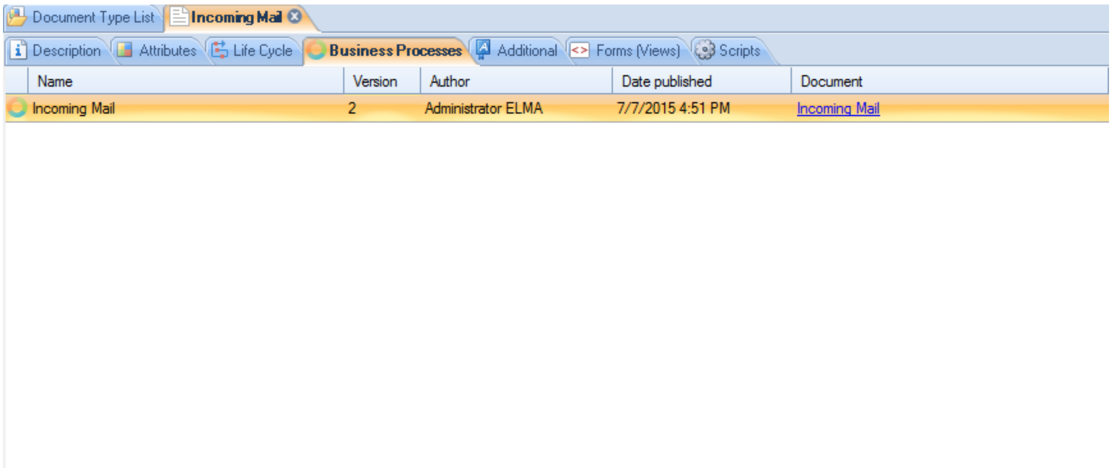


Fig. 134. Business Processes tab with the added process

Each document type may have numerous routes. When routing a document in **ELMA Web Application**, the user has to select one of them, if that is the case.

To make the changes available, save and publish the document type, click **Publish** in the **Save** button drop-down menu of the document type page (Fig. 36).

3.6 Routing a Document

After you bind the route and publish the document type, the route becomes available in **Web Application** for the current document type. To start the routing process, click **Start Process** in the top menu of the document page in **Web Application** (Fig. 135).

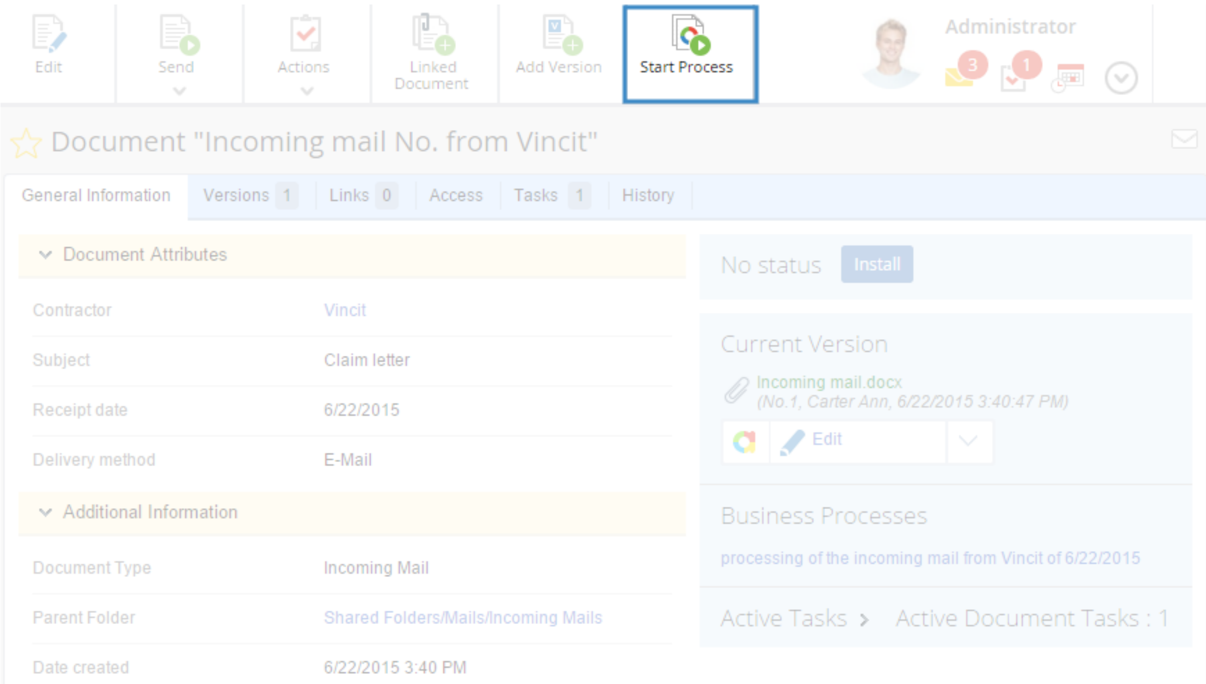


Fig. 135. Start Process button in the document page

This button is only available if the user has rights to route documents (this is configured in the swimlane that features the start event).

After clicking **Start Process** you have to confirm it and to select a route if there are several routes available (Fig. 136).

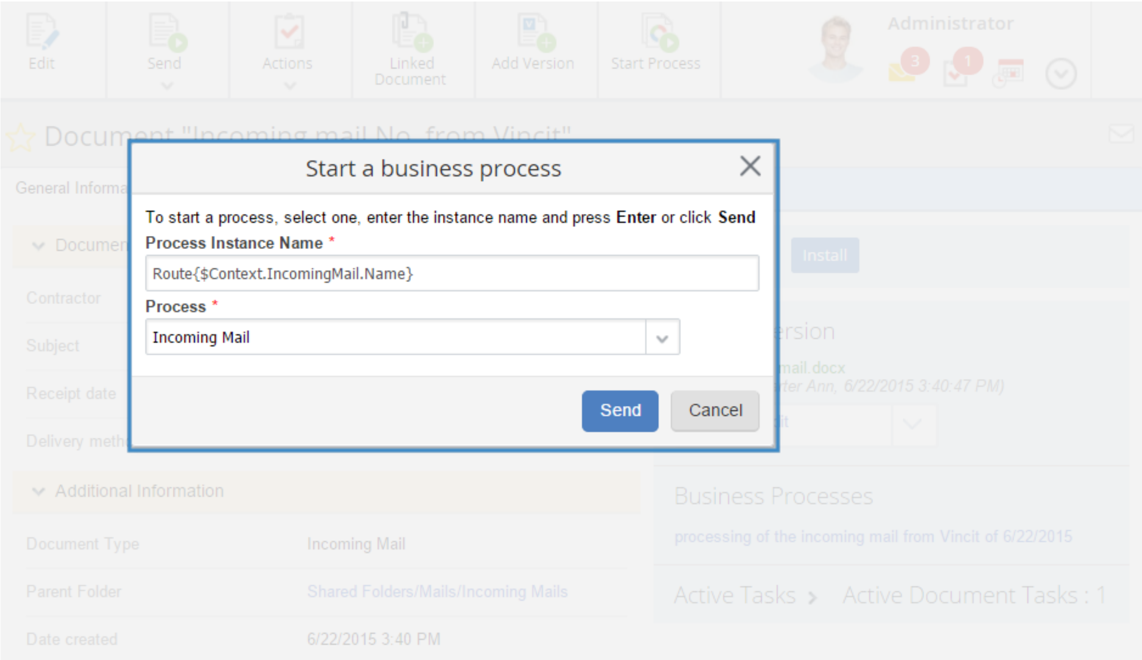


Fig. 136. Business process start confirmation.

When you click the **Send** button, the document is processed according to the selected route. The executors will receive document-related tasks according to the route graphical model.

3.6.1 Document Route Execution

By **route execution** we understand tasks consequently assigned and completed according to the routing model.

Consider routing Incoming Mail. Go to the main page of **Web Application** and click **Create Document** to create an **Incoming Mail** document (Fig. 38). Save the document and click **Start Process** in the document page. Select the "Incoming Mail" route (Fig. 136). The first "**Confirm sending document by route**" task opens at once (Fig. 137).

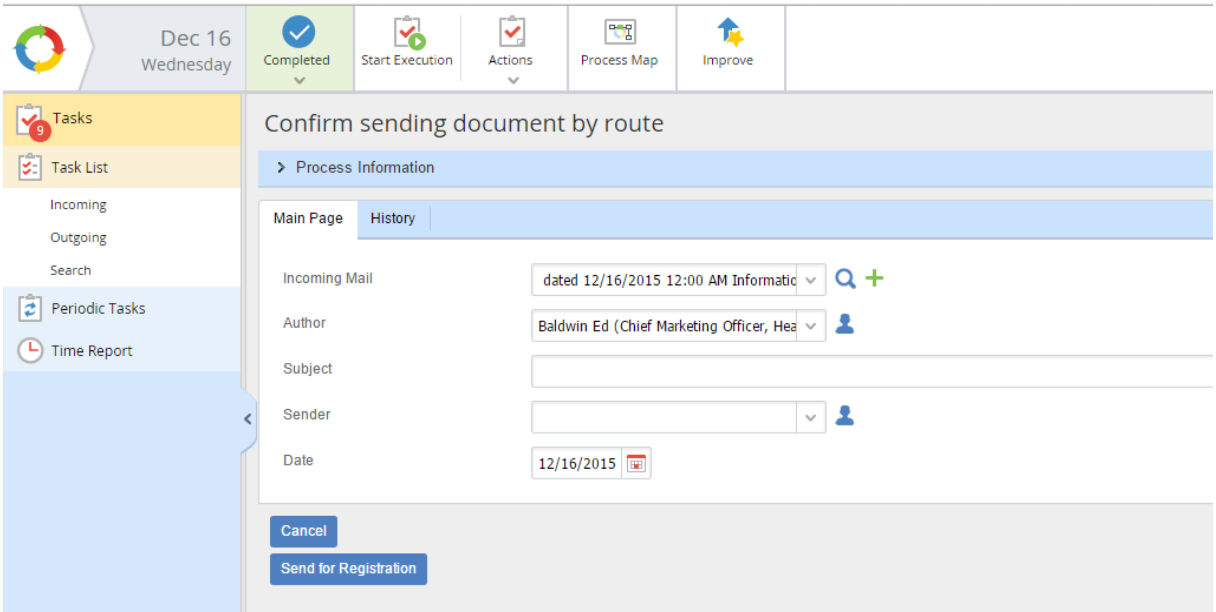


Fig. 137. "Confirm Sending Document by Route" task in ELMA Web Application.

The executor receives a notification about the task being assigned. The task appears in their task list (Fig. 138) and the Tasks portlet (Fig. 139).

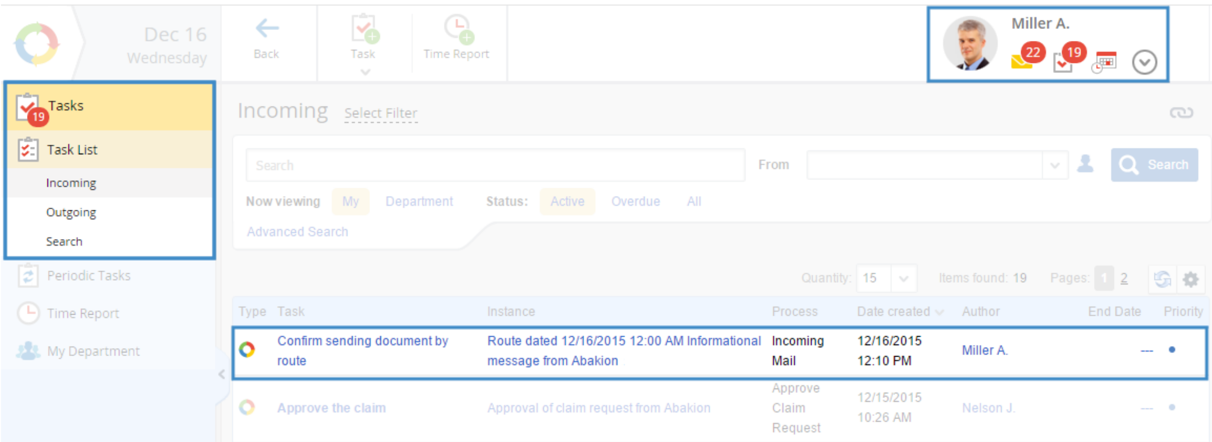


Fig. 138. Document routing task in the Tasks section.

Click on the task name to go to the task page (Fig. 137).

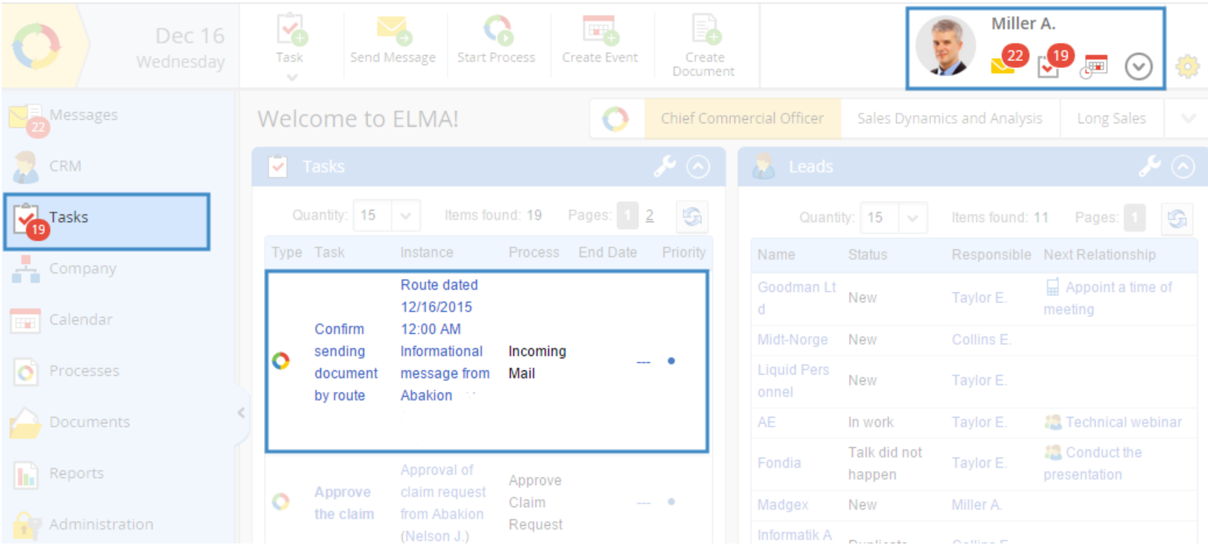


Fig. 139. Document routing task in the Tasks portlet.

In the Tasks portlet and the task list, the user's tasks related to document routing are depicted with . Tasks that are assigned in the routing process with document management activities are depicted in the following way: for the **Document Registration** operation, for the **Consideration** operation, for the **Acquaintance** operation.

Any task concerning document routing contains information about the route in the collapsed **Process Information** panel. It also features the process map. Access to the process map can be limited, for more information see **ELMA Help** and **ELMA BPM Platform** quick-start manual (Fig. 140).

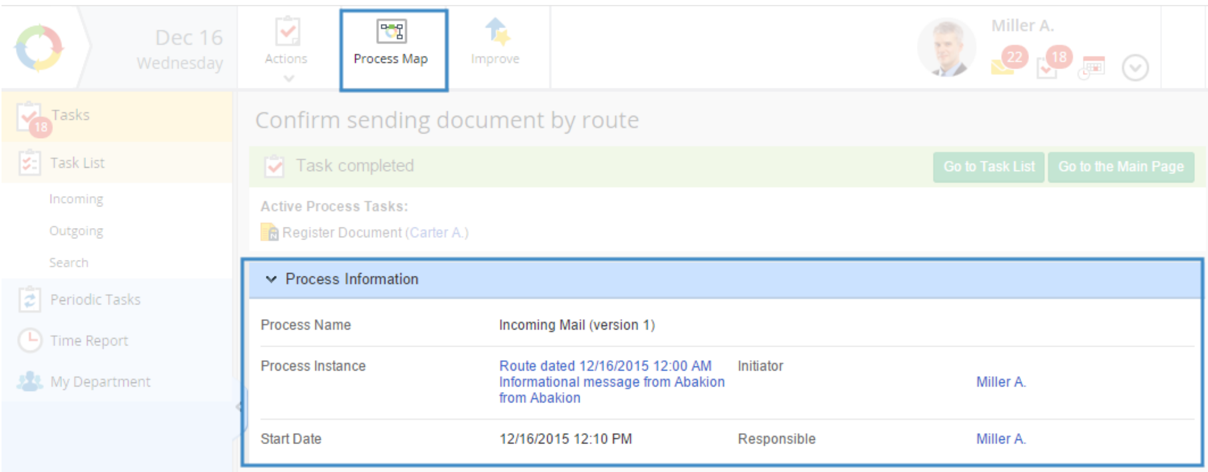


Fig. 140. Information about the process and Process Map button.

Click **Send for Registration** in the task page to confirm sending the document for registration (Fig. 137) and following consideration.

The page of the **Registration** document routing task in **Web Application** (Fig. 141) is similar to the page of the document registration page (Fig. 85). There are several differences: process information, process map (Fig. 140) and the **Responsible** and **List of users acquainted with the document** context variables (when the **Document Registration** is configured, these variables are specified in the **Context** tab (Fig. 123).

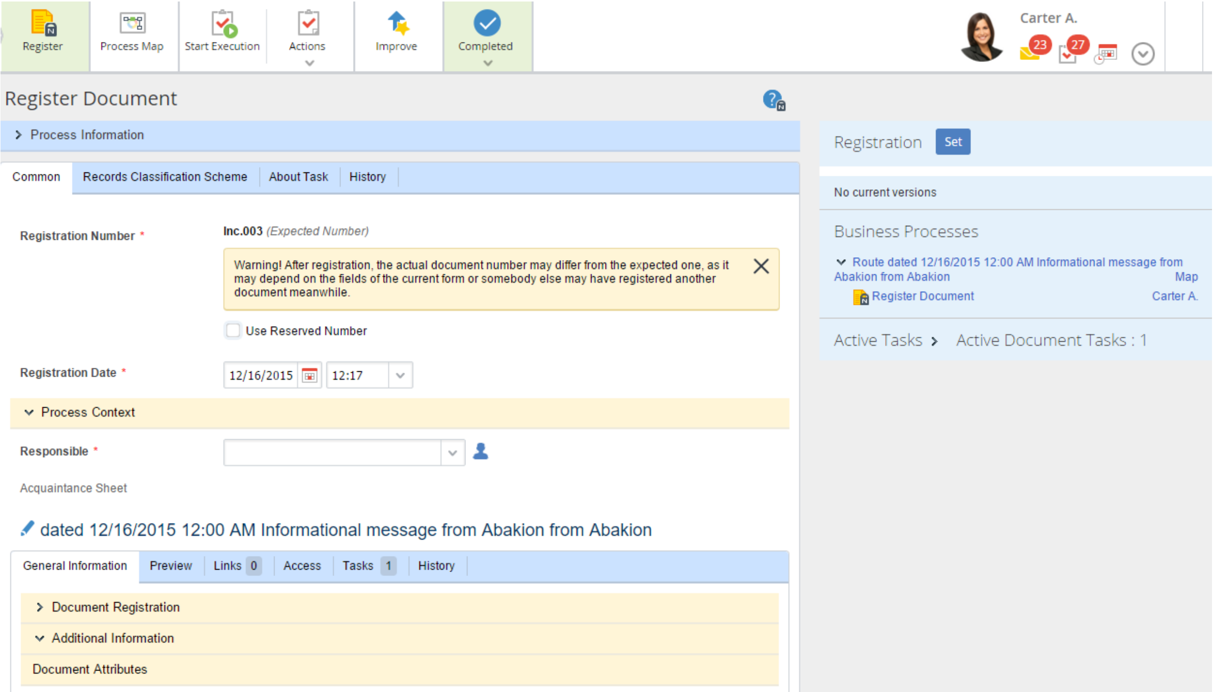


Fig. 141. Register Document task of the Incoming Mail routing process.

In this task, the secretary has to select the user who will consider the document. It is also possible to add users to the **List of users acquainted with the document**. Then click either **Register** in the top menu or **Send for Consideration**.

The executors perform their tasks according to the workflow. They do not have to decide what the next process step is, the system automatically assigns necessary tasks according to the graphic model, ensuring that the document does not get lost.

3.6.2 Execution Control

ELMA ECM+ features several tools to monitor execution of tasks related to the routed documents.

The **My Processes** portlet and **Process Monitor** page are used for in-process control. With the **Report on document task compliance (3.1)** you can review document-related tasks. In addition, you can always check the current tasks in the process map.

In the **My Processes** section you can monitor the processes and routes in which the current user participates (as initiator, participant or person responsible). There are process filters which you can use to monitor the processes started by the user and identify the ones that are "stuck" (Fig. 142).

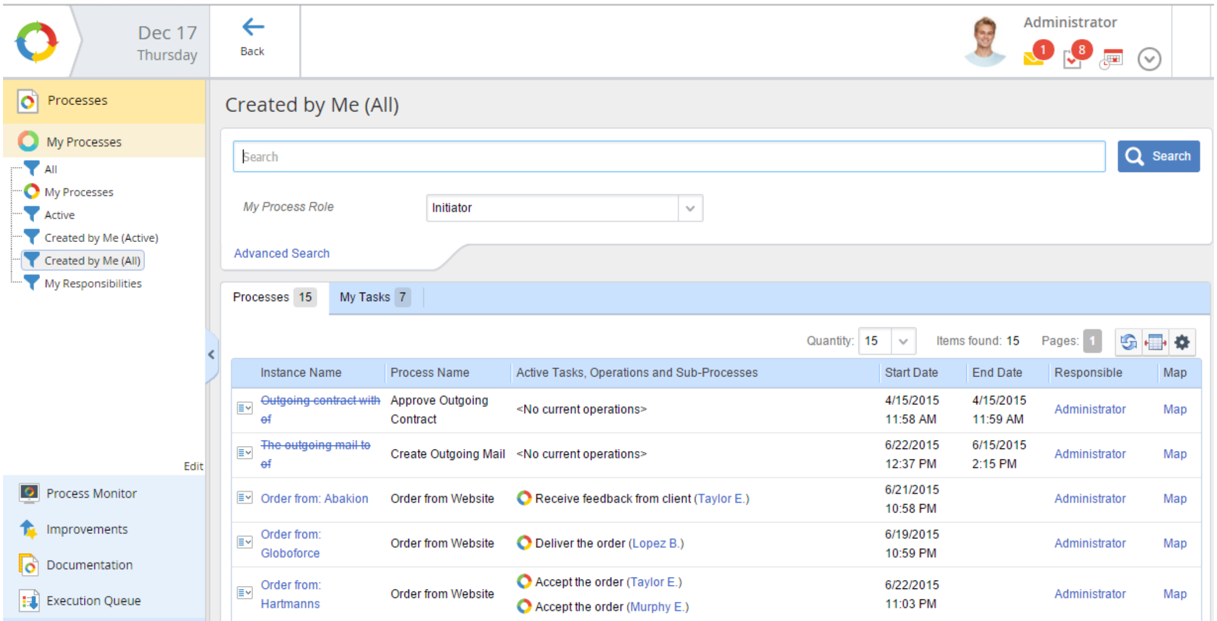


Fig. 142. My Processes section. Created by Me (All) filter

The **My Processes** portlet offers similar functions (Fig. 143). You can place it on the main page of **Web Application**.

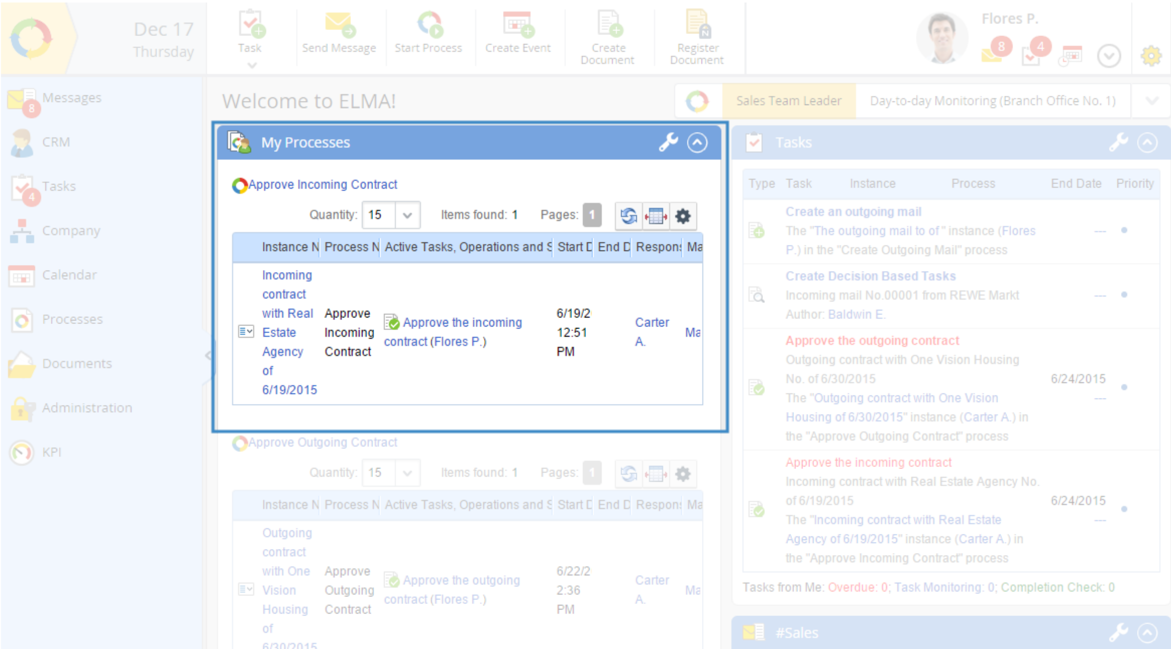


Fig. 143. My Processes portlet on the main page.

You can open the process map from the route task page (if you have the rights to do so), from the process instance page or from the process list given in the **My Processes** page (or **My Process** portlet). The Process Map shows at which point the document is at the moment. The completed tasks and transitions are outlined in blue; the current task is outlined in green (Fig. 144).

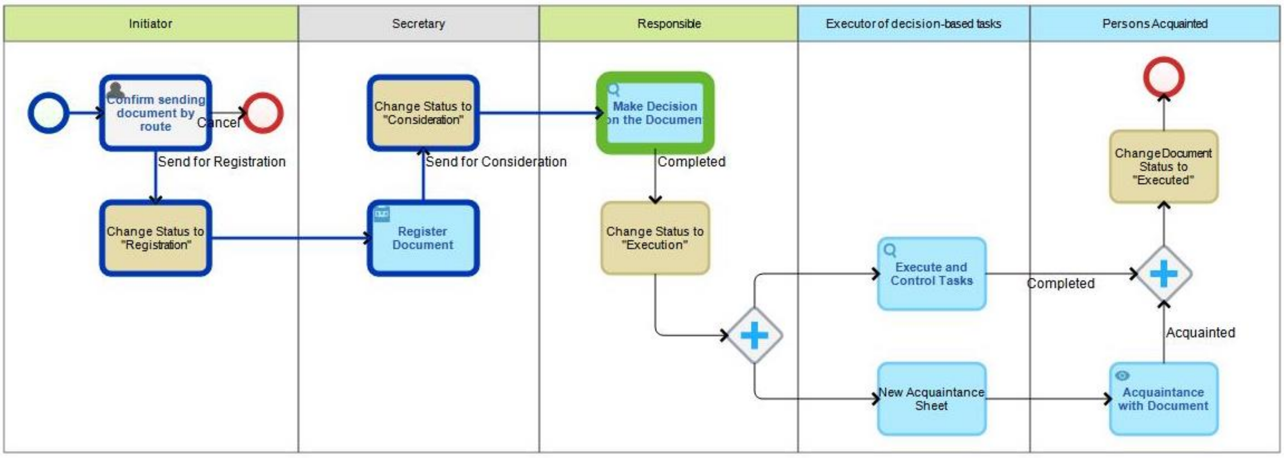


Fig. 144. Map of the active Incoming Mail routing process

Report on document task compliance (3.1) (3.1) is included in **ELMA**. It is available in the **Reports** section. By default, only the Administrator has access to this section. All the other users need privileges to access it. Specify the report parameters (task types, statuses, dates) and click **Show Report** in the top menu. Fig. 145 shows an example of settings for a list of tasks with document attachments and approval tasks.

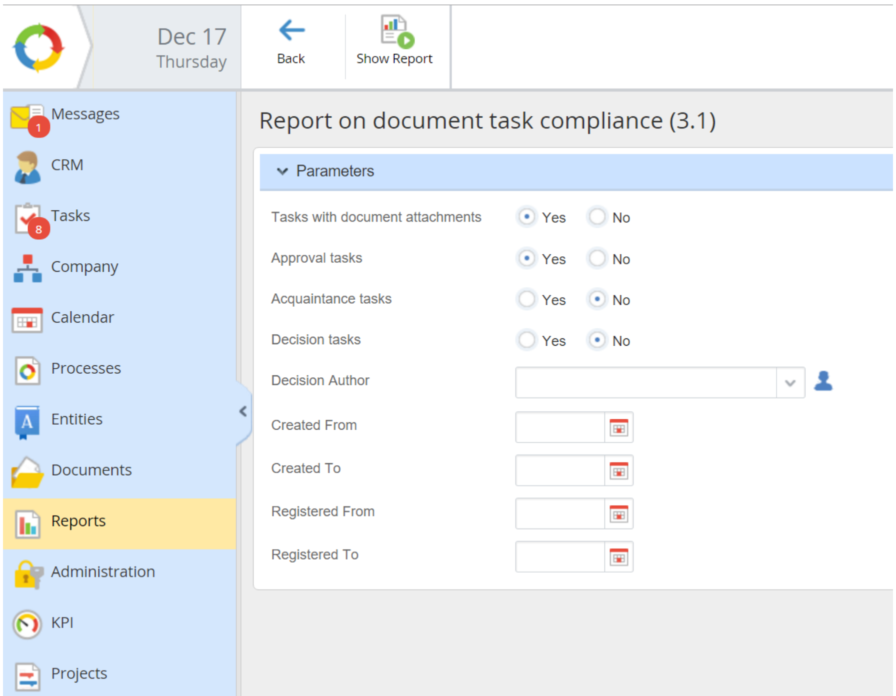


Fig. 145. Report on document task compliance (3.1)

Once set, click Show Report. You will see the following list of document-related tasks (Fig. 146):

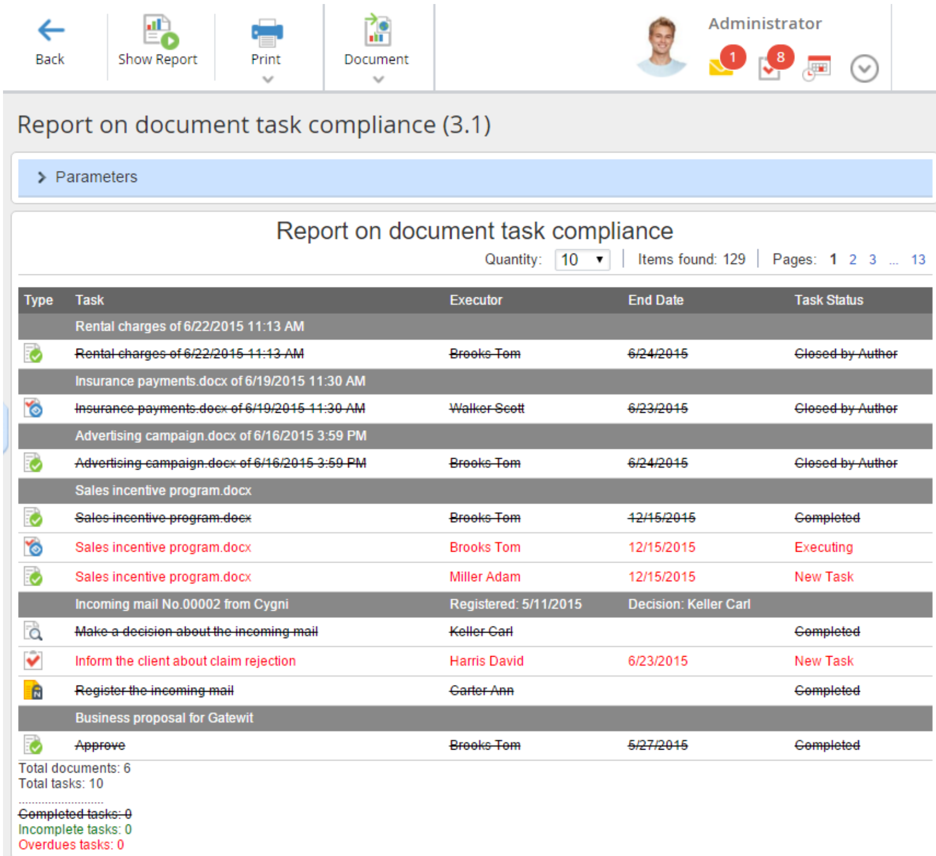


Fig. 146. Report on document task compliance. List of tasks

You can save the report as a web document or print it out. You can also create your own reports on documents and routing processes (this possibility is described in **ELMA Help**).

To find information fast, use filter folders with document life cycle statuses. They can show, for example, the documents that are currently in work (Fig. 147).

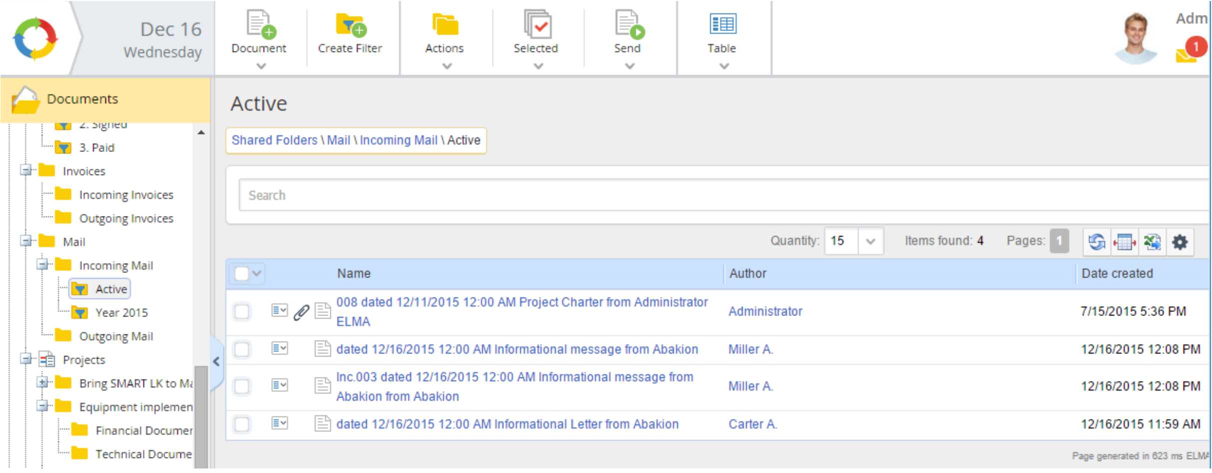


Fig. 147. Filter folder for active documents

To monitor key indicators, you need to set up a system of metrics and document route indicators. For example, you can schedule route duration; the system will mark all the routes that exceed the scheduled duration. This manual does not describe metrics and indicators; for more details, see **ELMA Help** or **ELMA BPM Platform** quick-start manual.

The **Tasks** tab of the document page shows all the document-related tasks, also the ones included in the route. The page also contains a link to the document's route and current related tasks (Fig. 148).

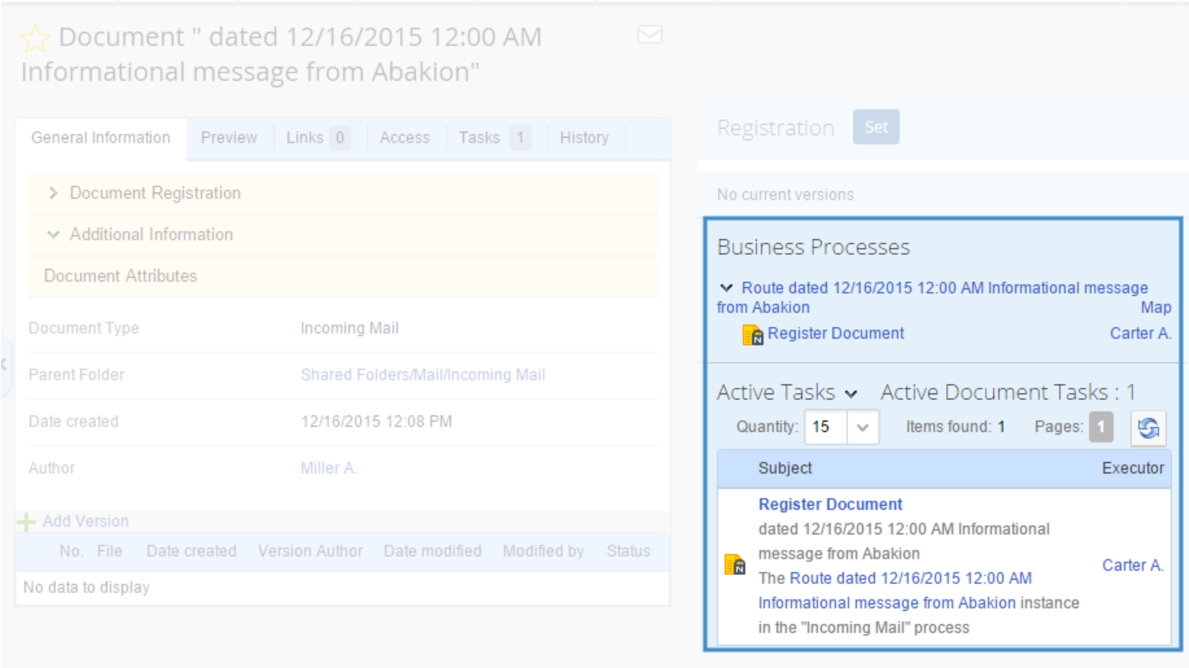


Fig. 148. Business Processes section of the document page

With these tools you can easily monitor how documents are handled in **ELMA ECM+**.

3.7 Creating a Document in the Routing Process

In section 3.5 you learned to model a route for a previously created document. In **ELMA ECM+** you can also create a document in the route itself. In the route's model, use the **Create Document** activity from the **Operation with Documents** section (Fig. 149).

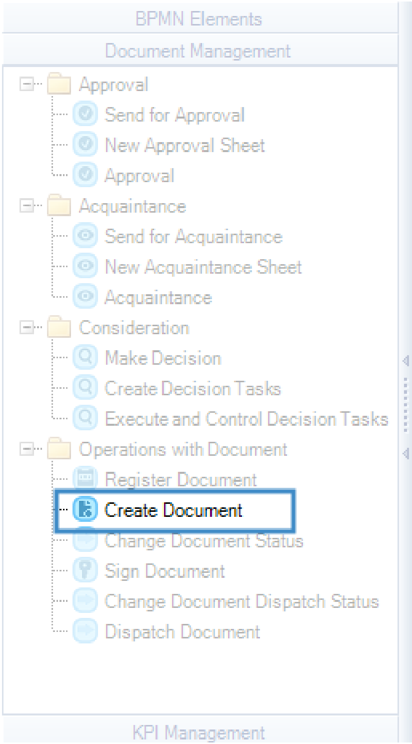


Fig. 149. Create Document activity

Modify the Incoming Mail route that you have modeled previously. Replace the **Confirm sending document by route** task with the **Create Document** activity.

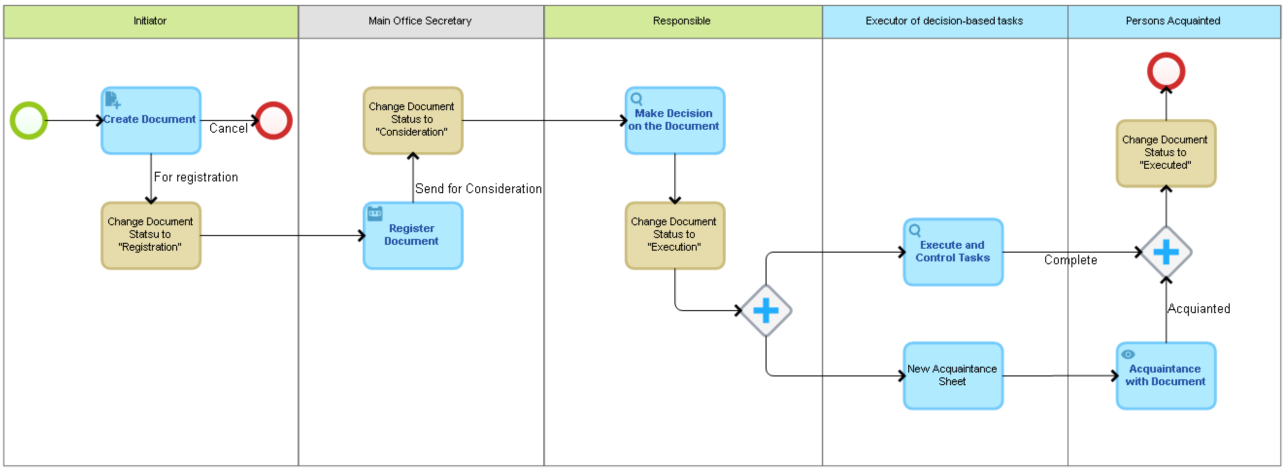


Fig. 150.Incoming Mail routing process including the Create Document operation

Configure the **Create Document** operation. Select the **Incoming Mail** document type in the **Common** tab (Fig. 151).

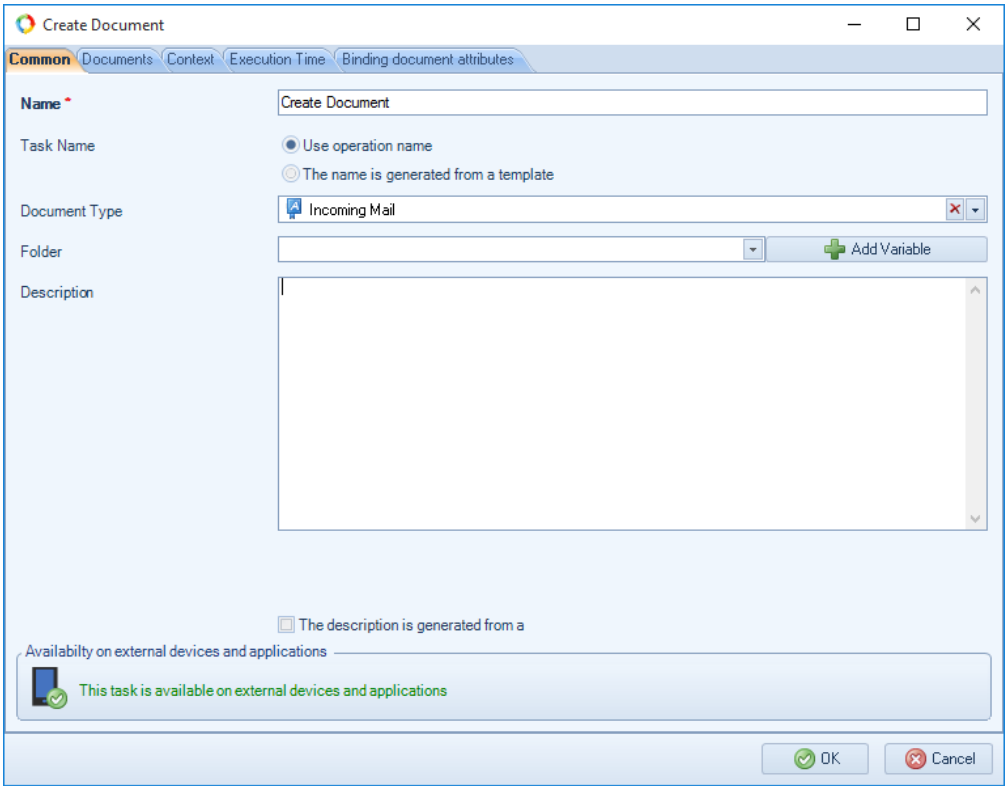


Fig. 151. Create Document settings. Common tab

In the **Documents** tab, select the **Incoming Mail** context variable (this tab is similar to other document management tabs). Save the changes by clicking **OK** in the configuration window.

Now set up the **Cancel** transition as shown in Fig. 152 so that there is no need to fill in the required document properties: select the **Cancel Operation** status. To do so, click **Change Status** and select the status required

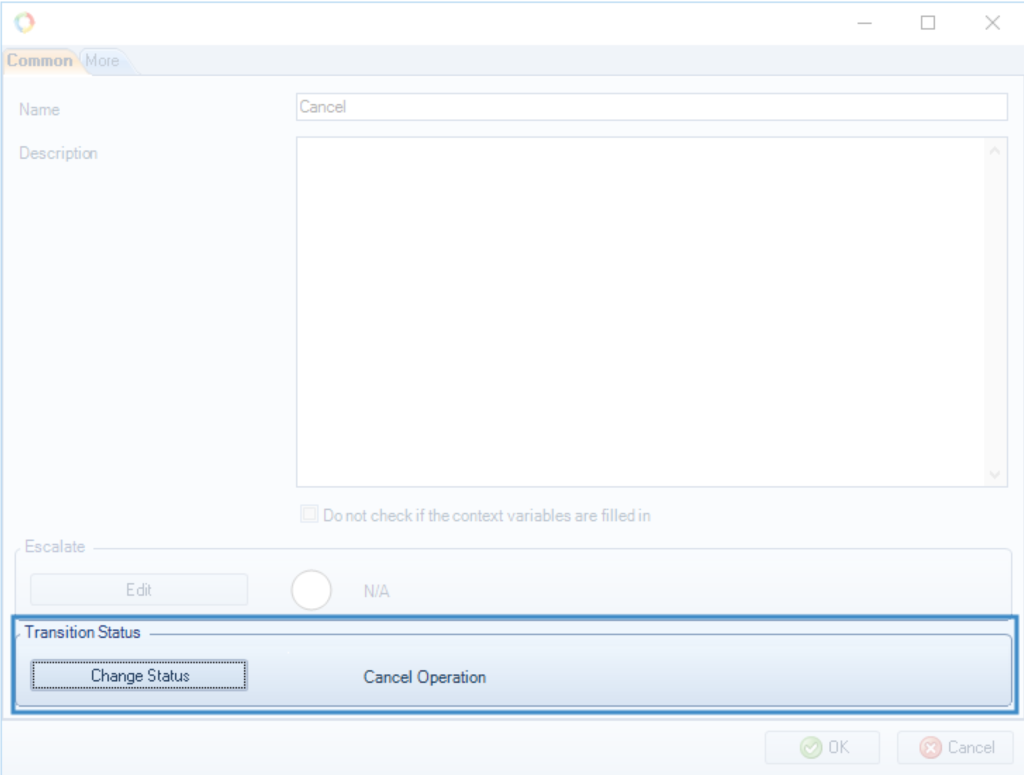


Fig. 152. Cancel transition settings . Change Status button

After adding the activity, there are other changes you have to make to the routing model. The process as it is will not work for a newly created document.

First, cancel binding the route to the document type (section 3.5.4). Then allow for manual start, selecting the **Manually** checkbox (Fig. 131).

Now this routing process can be started like a regular process (for example, from the main page, using the **Start Process** button). Documents of the **Incoming Mail** type will not have the **Start Process** button in the document page). The first task of the new modified process is creating a document which will then be routed. The Create Document task (Fig. 153) in the routing process is similar to the one in **Web Application** (Fig. 38), though it also contains information about the route and a button to complete the task.

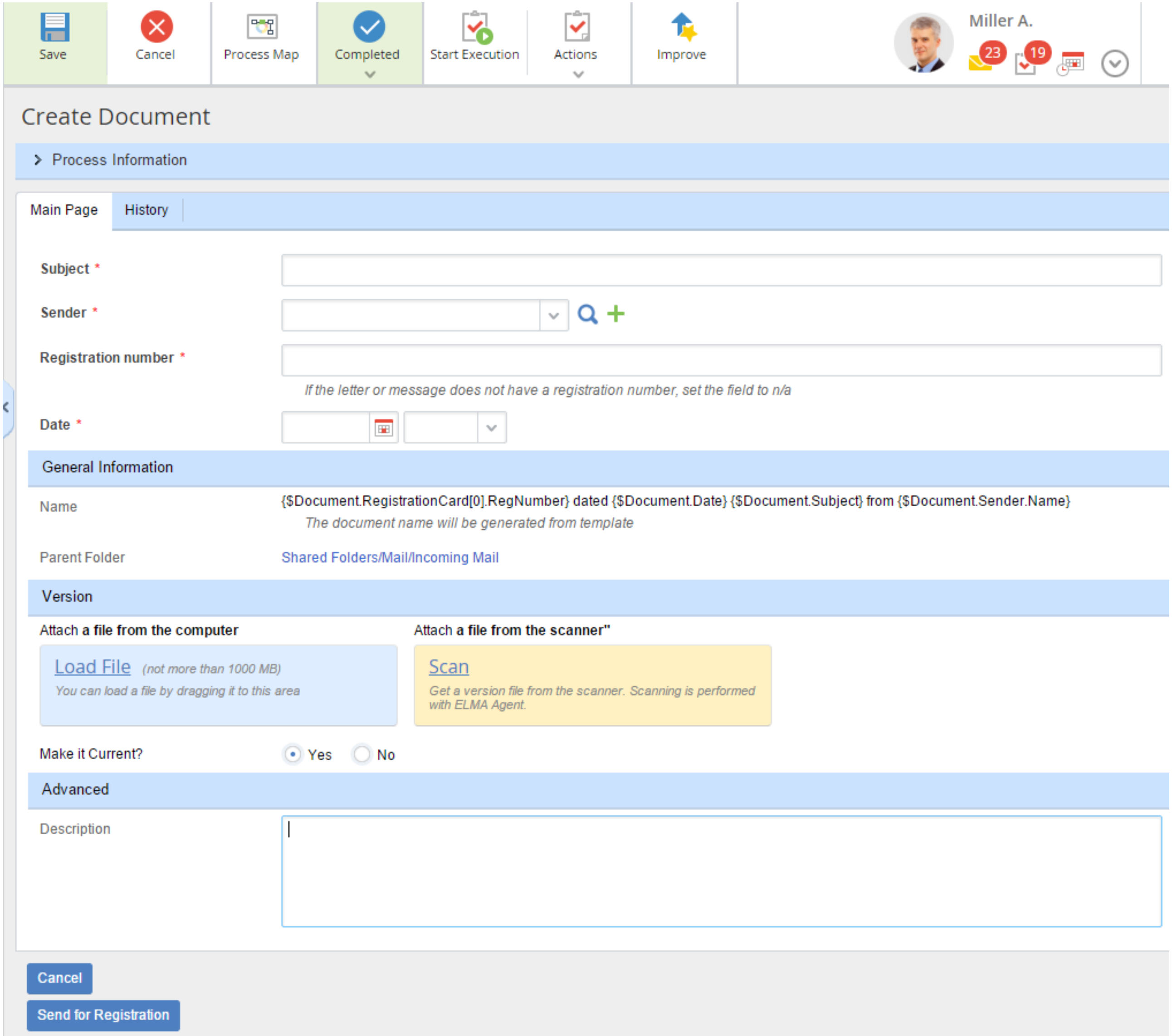


Fig. 153. Create Document task of the Incoming Mail routing process in ELMA Web Application

Chapter 4. Processing of other Document Flows

Chapter 2 gave a general description of Electronic Document Management, necessary document flows and recommendations.

Chapter 3 gave an example of how it all works: you learned how to configure processing of incoming mail in **ELMA ECM+**.

Other document flows are configured in a similar way step by step.

The first stage of document flow management requires to specify the engaged document types, create them, and define their properties (section 3.1). Then you have to decide if document registration is required, create and configure the Records Classification Scheme (section 3.3); set access to Record Management and assign permission to register documents to those users who are responsible for document registration.

Then you have to set up the document storage structure: create a folder tree that stores documents and filter folders, configure access permissions (section 3.4).

The next step is to elaborate document routes, if document routing is used in the company (sections 3.5 – 3.7). Some document types do not require routing, they can be managed with the basic document management functions described in Chapter 5.

The last step is to set up user instructions for document management, accept company policies regarding handling documents in the Electronic Document Management system, if necessary.

ELMA experts have developed ready-to-use solutions for document management within a company. They are all available in **ELMA Store** (https://store.elma-bpm.com/). Some of them are free and can be used to launch electronic document management in your company. **ELMA Store** features general-purpose processes that can be adjusted to the company's requirements for document management.

Chapter 5. Common Document Management Operations

ELMA ECM+ application features common document management operations. They allow you to modify the document and make these changes available to all the users who have viewing permissions for the document.

The common operations are available from the drop-down menu of the **Send** button in the document page's toolbar (Fig. 154). They can also be used in a routing process, if required by the route (section 3.5.2).

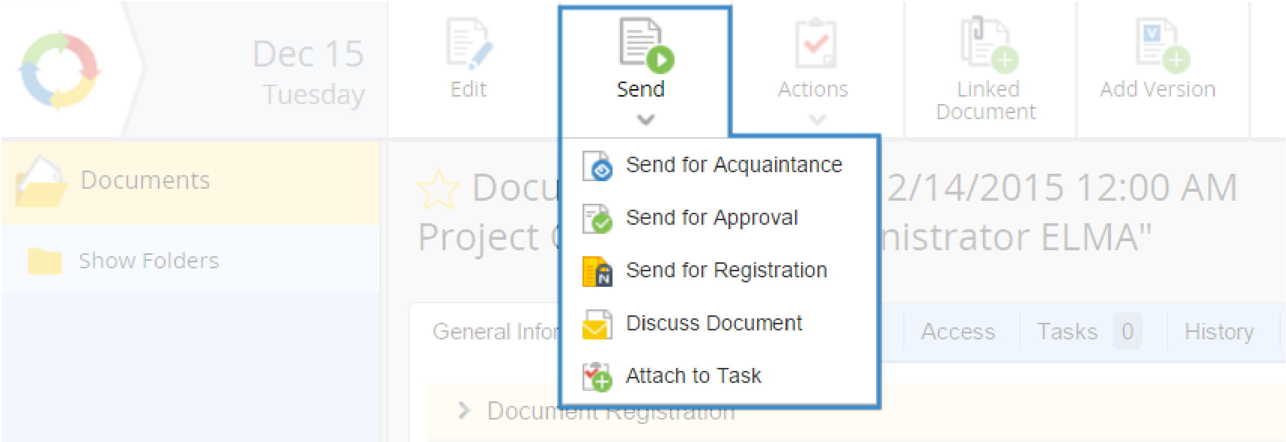


Fig. 154. Common operations

5.1 Acquaintance

The **Send for Acquaintance** activity sends the document for acquaintance to any user or a list of users. **ELMA** creates an acquaintance task with the document attached, allowing to review the document and add a comment if necessary.

To send a document for acquaintance, click **Send** in the top menu and select **Send for Acquaintance** (Fig. 154). The Send for Acquaintance form will be provided (Fig. 155).

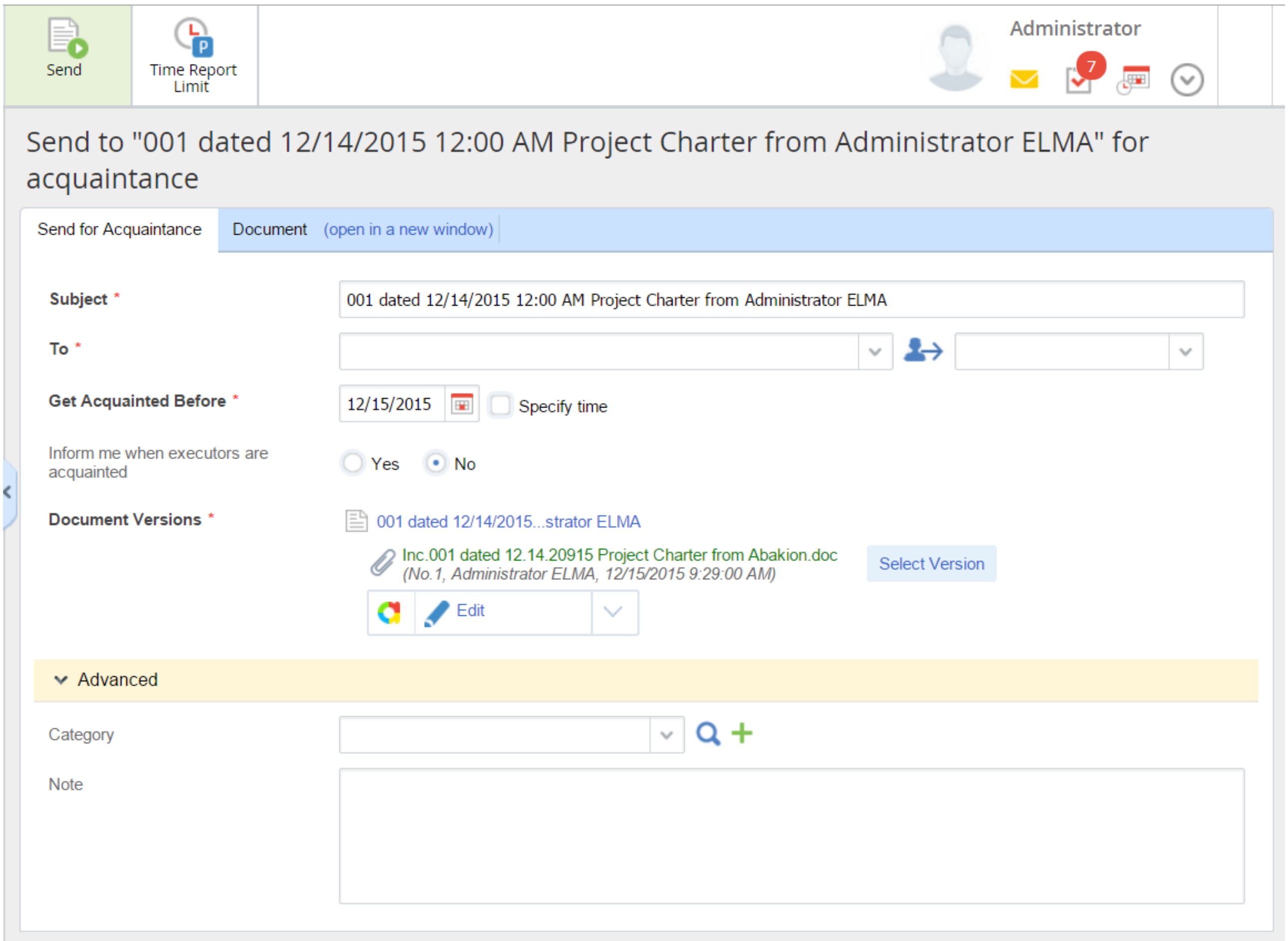


Fig. 155. Send for Acquaintance form

The form features two tabs, **Send for Acquaintance** and **Document** (contains the document page).

The **Send for Acquaintance** tab contains fields that must be filled in before sending:

Subject – Title of the acquaintance task. By default this field is filled in with the name of the document being sent, but you can change it, if needed.

To – List of users who must get acquainted with the document, they will be executors of the acquaintance task.

Get Acquainted Before – Date by which the executors have to get acquainted with the document.

Inform me when executors are acquainted – If this option is set to **Yes**, the initiator is notified once the executor gets acquainted with the document. By default, this option is set to **No**.

Document Versions – If the document has several versions, you can select which version you want to send for acquaintance. By default, the current version is selected.

In the **More** section you can add information related to the document or the acquaintance task, and select task category (if categories are configured).

After filling in the fields, click **Send** in the top menu of the form to assign the acquaintance task (Fig. 155).

The users specified in the **To** field will receive a task to get acquainted with the document (Fig. 156). If some of them do not have rights to **View/Load** a document, the system will offer to give them corresponding permissions. The document version is available for viewing or downloading in the **Acquaintance** tab. To complete the task, click **Acquainted** in the top menu of the task.

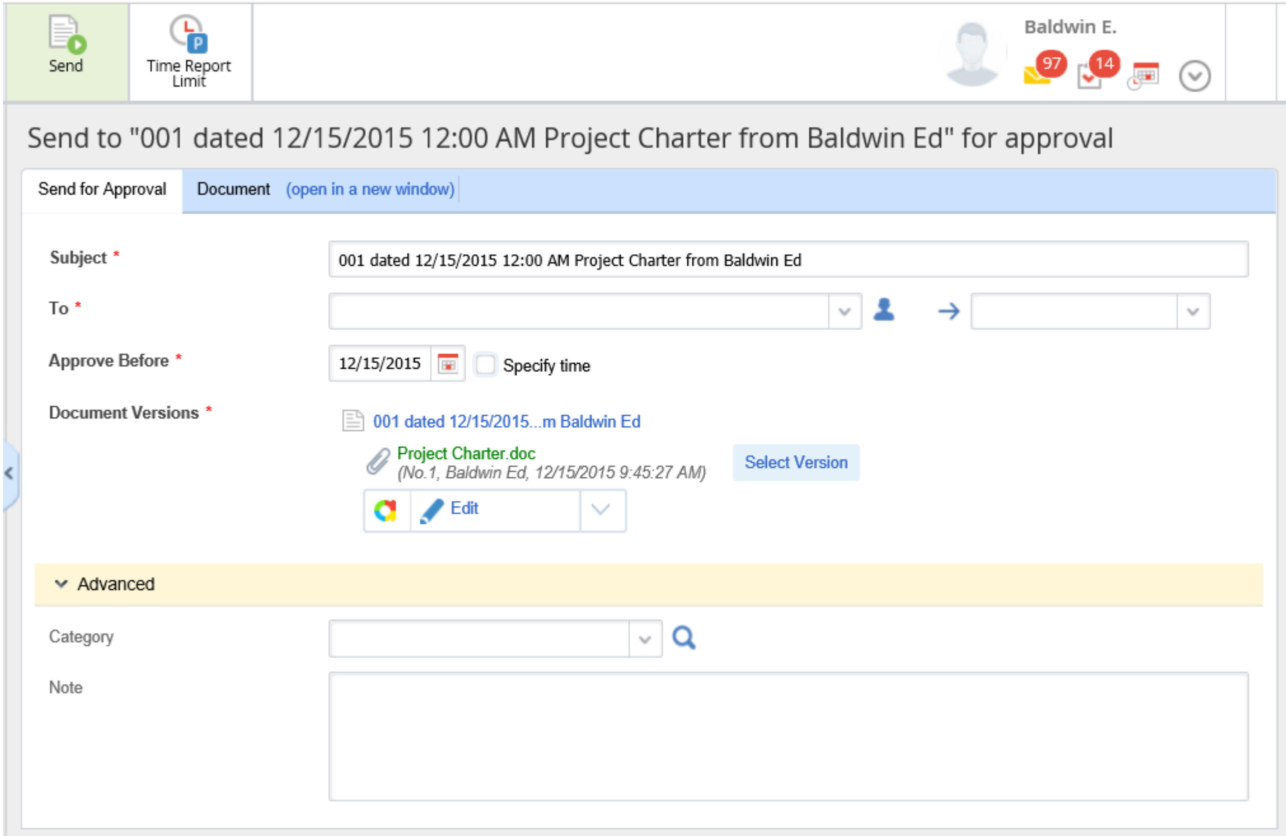


Fig. 156. Acquaintance task

After that, the **Add Comment** window opens. The comment will be added to the acquaintance sheet. Click **Save** to finish work (Fig. 157).

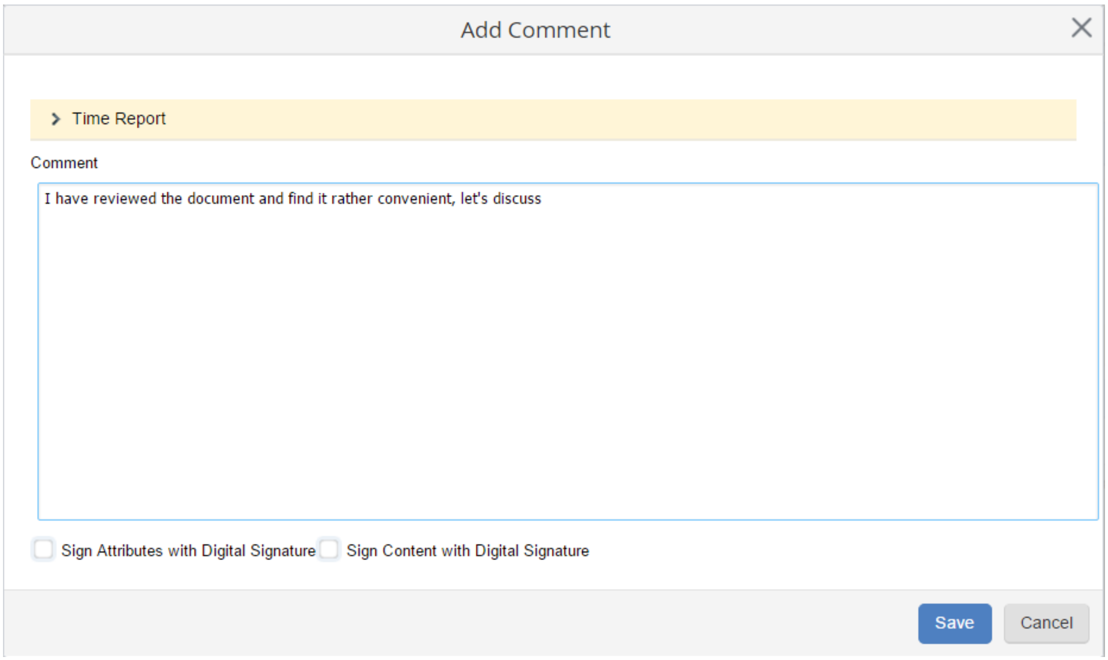


Fig. 157. Add Comment window

The **Acquaintance** tab of the document page shows whether a user has been acquainted with the document or not (Fig. 158).

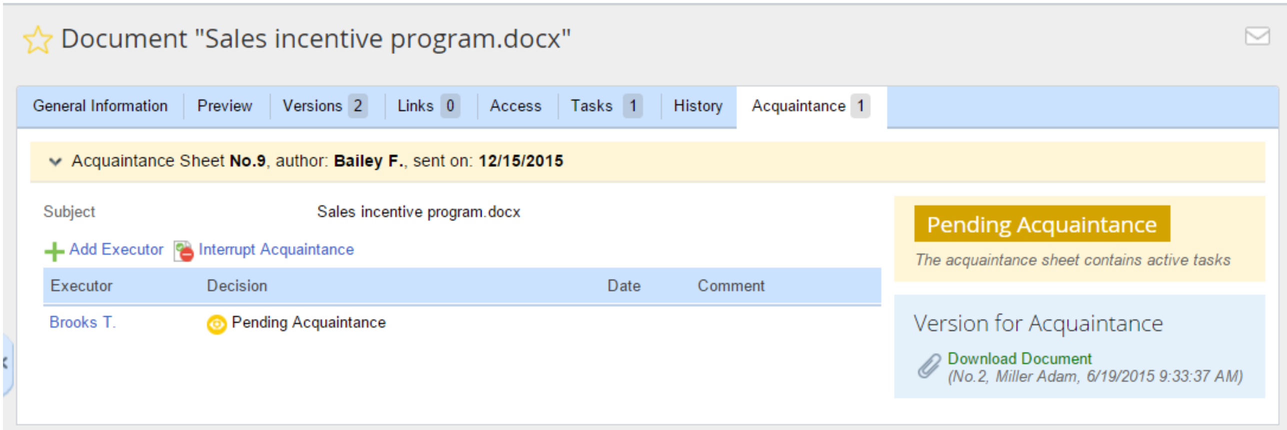


Fig. 158. Document page. Acquaintance tab

A document can be sent for acquaintance numerous times. Each time a new acquaintance sheet is generated. All the acquaintance sheets are available in the **Acquaintance** tab.

5.2 Approval

You can send a document for approval to any user or a list of users. **ELMA** creates an approval task with the document attached to it.

To send a document for approval, click **Send for Approval** in the drop-down menu of the **Send** button (Fig. 154); the approval form will appear (Fig. 159).

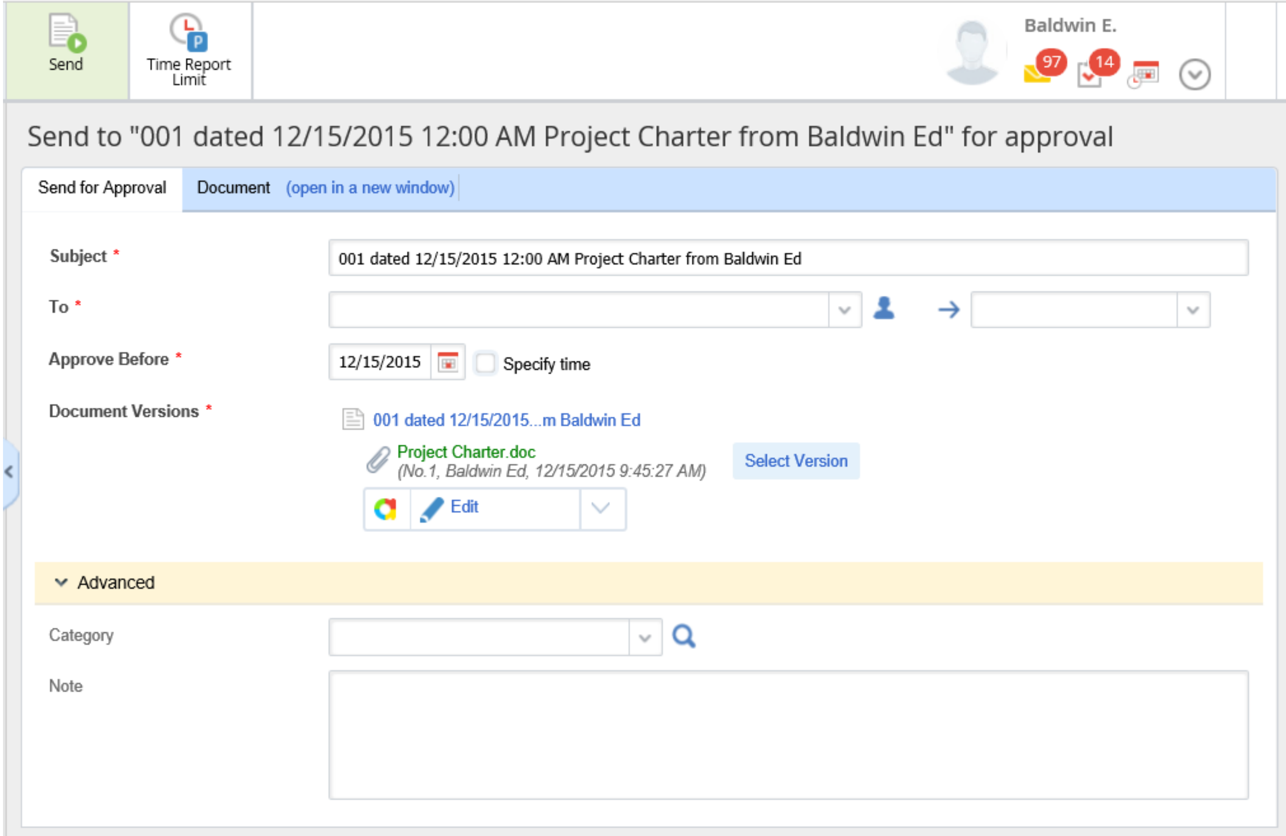


Fig. 159. Send for Approval form

The **Send for Approval** form is similar to the **Send for Acquaintance** form (Fig. 155) and contains the same fields. The **To** and **Approve Before** fields are required fields. Once all the fields are filled in, click **Send** in the form's top panel.

If there are several users listed in the **To** field, the **Approval Type** option appears, offering to select either parallel or serial approval. For more information on this function, see **ELMA Help**.

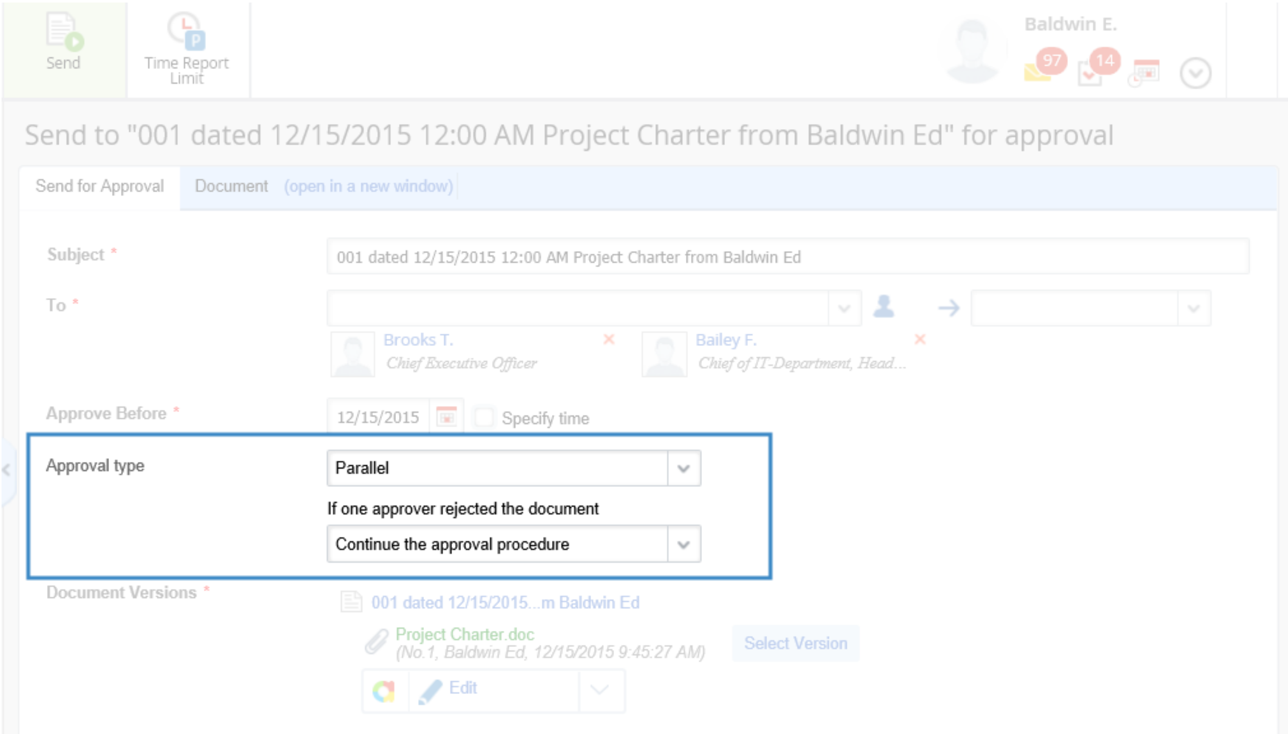


Fig. 160. Approval type.

The users specified in the **To** field receive the task to approve the document (Fig. 161). According to the approval type, they receive the task at the same time or one by one. If neither of them have rights to **view/load** the document, **ELMA** will offer to give corresponding permissions. The document version that has to be approved is available for viewing or downloading in the **Approval** tab.

Once you have made a decision on the document, click **Approve** or **Reject** in the top menu of the task. A window will be provided to make a comment on the decision made (similar to the acquaintance task, Fig. 157). The comment will be added to the approval sheet. Click either **Approved** or **Rejected**, according to the decision made.

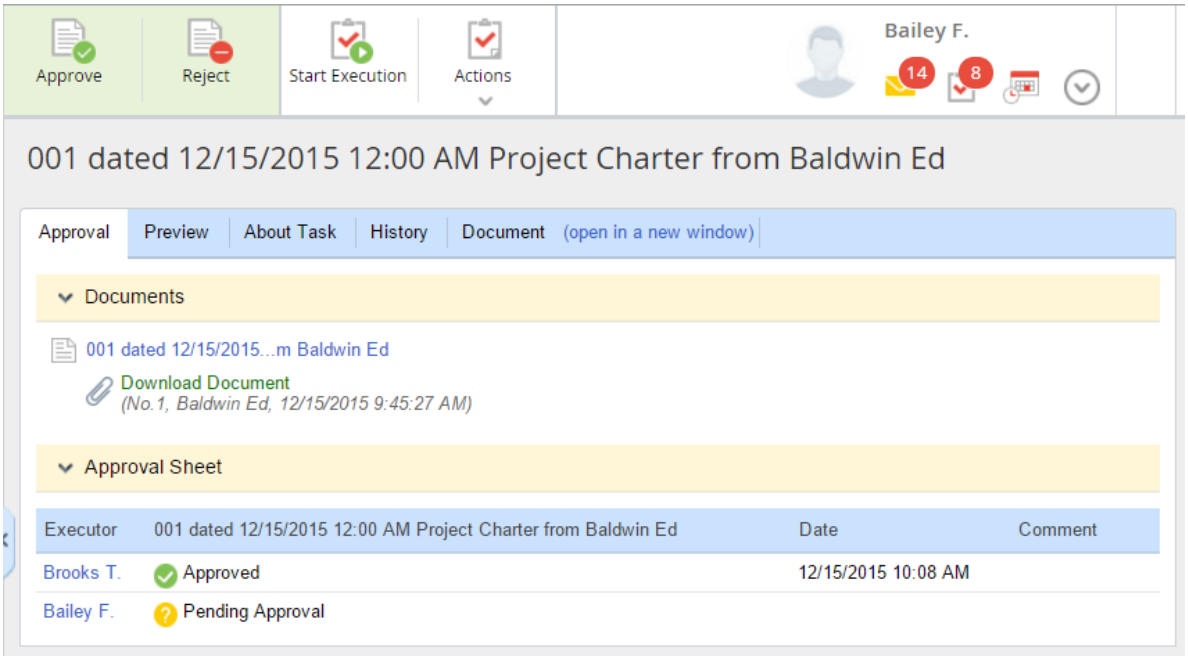


Fig. 161. Approval task

Information about approval is available in the Approval tab of the document page (Fig. 162). The buttons for managing approval (**Interrupt Approval Procedure, Add Approvers** and **Delete Executor**) are only available to the approval sheet author (initiator).

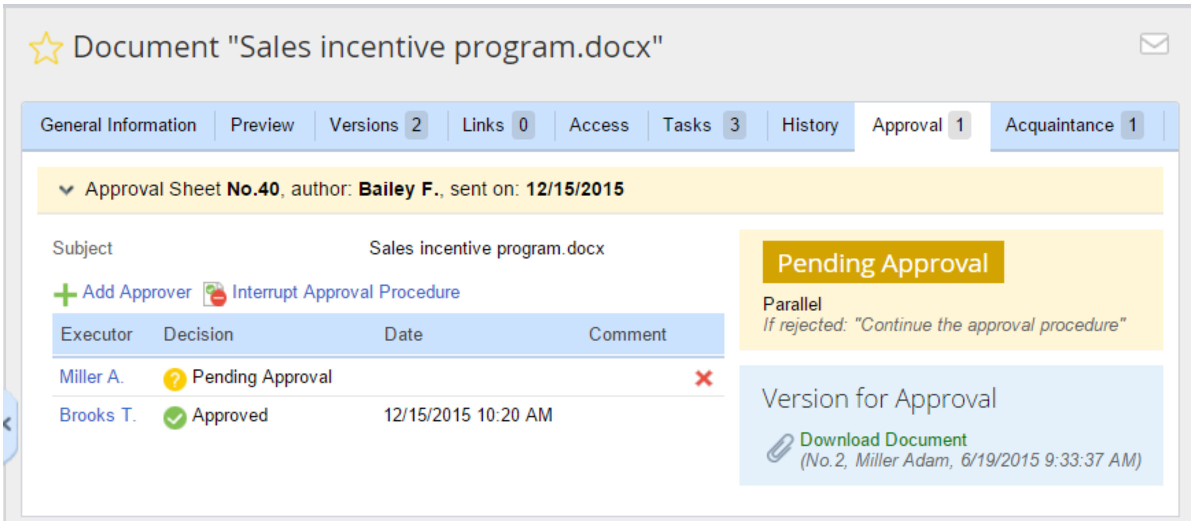


Fig. 162. Document page. Approval tab.

A document can be sent for approval multiple times. Each time, an approval sheet is generated. All the sheets are available in the **Approval** tab (Fig. 162).

5.3 Consideration of a Document

This operation allows you to send a document to the user for consideration and decision-making. The system creates a consideration task with the document attached. When the decision is made, the user can assign relevant tasks.

Only a **registered** document can be sent for consideration. To send a document for consideration, click **Send** in the top menu and select **Send for Consideration** (Fig. 154). A sending form will open (Fig. 163).

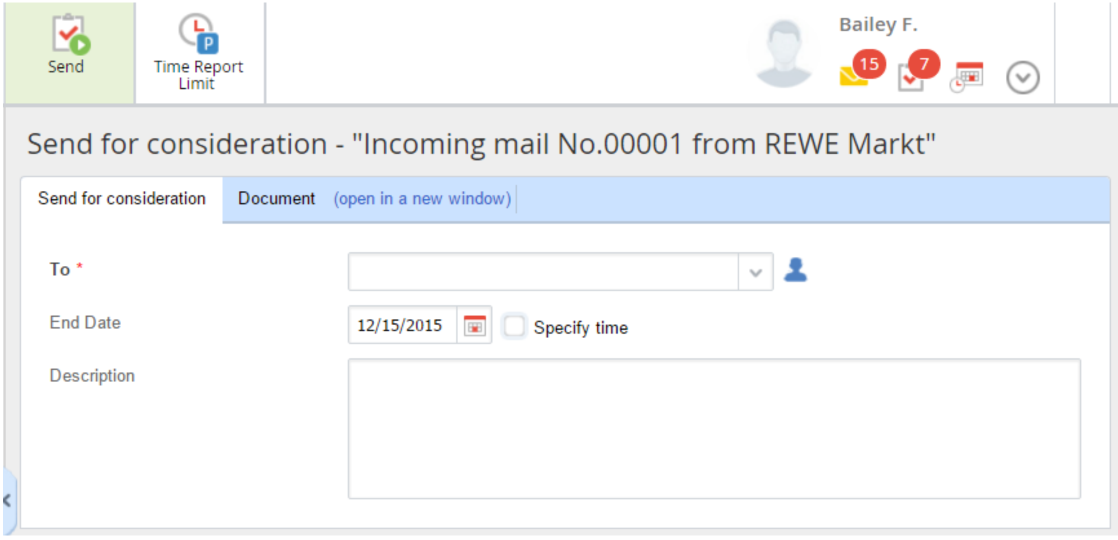


Fig. 163. Send for Consideration form.

In the **To** field, specify the user who will consider the document, indicate the due dates and make a comment in the description field. Once the fields are filled it, click **Send** to send the document for consideration.

The user specified in the **To** field will be assigned with a task to consider the document (Fig. 164).

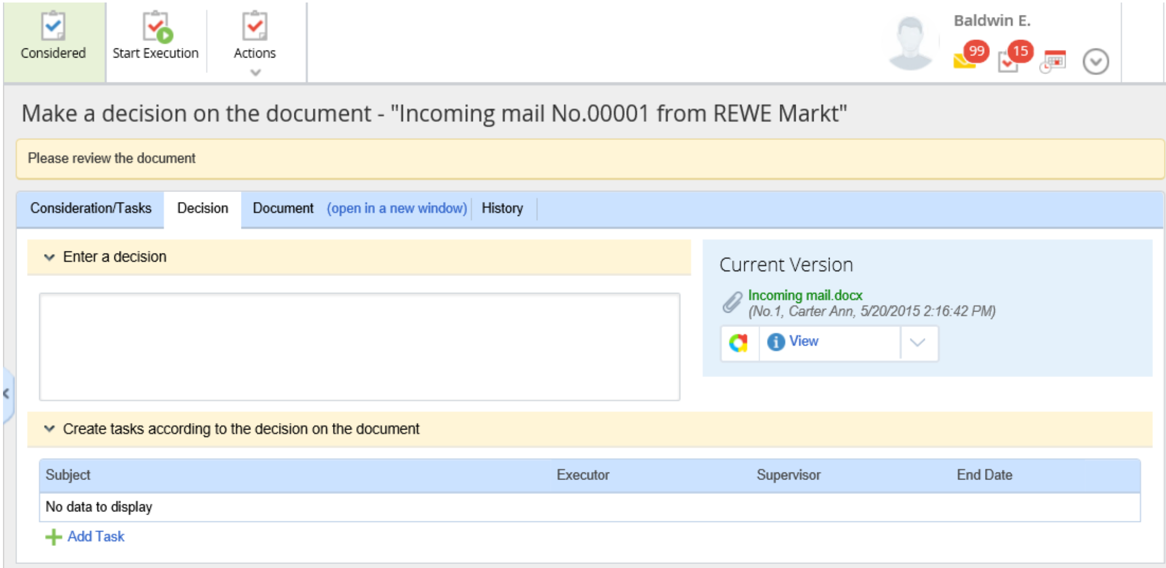


Fig. 164. Consideration task.

The task contains the document, the preview tab, and the tab with active consideration tasks and list of decision-based tasks.

A document can be send for consideration various times to the same user or to different users. Each of them can create decision-based tasks and send the document for approval, consideration, acquaintance, etc. If the same user re-considers the document, the text of the decision made previously becomes available for editing.

To complete the consideration task, you have to write a decision in the **Decision** tab, and create decision-based tasks if necessary. Then click **Considered** in the top menu of the task.

To add new decision-based tasks use the Add Task button located in the **Create tasks according to the decision on the document** section. For more information, see **ELMA Help**.

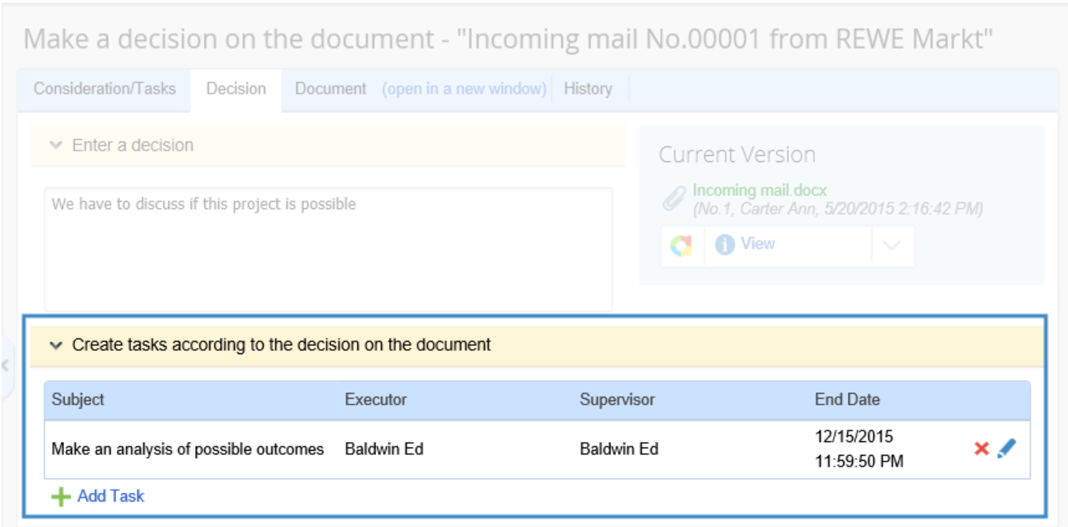


Fig. 165. List of added decision-based tasks.

Once the consideration task is completed, all the decision-based tasks will be assigned to the executors. Decision-based tasks are similar to the user tasks, but they also contain the document and the decision itself (Fig. 166).

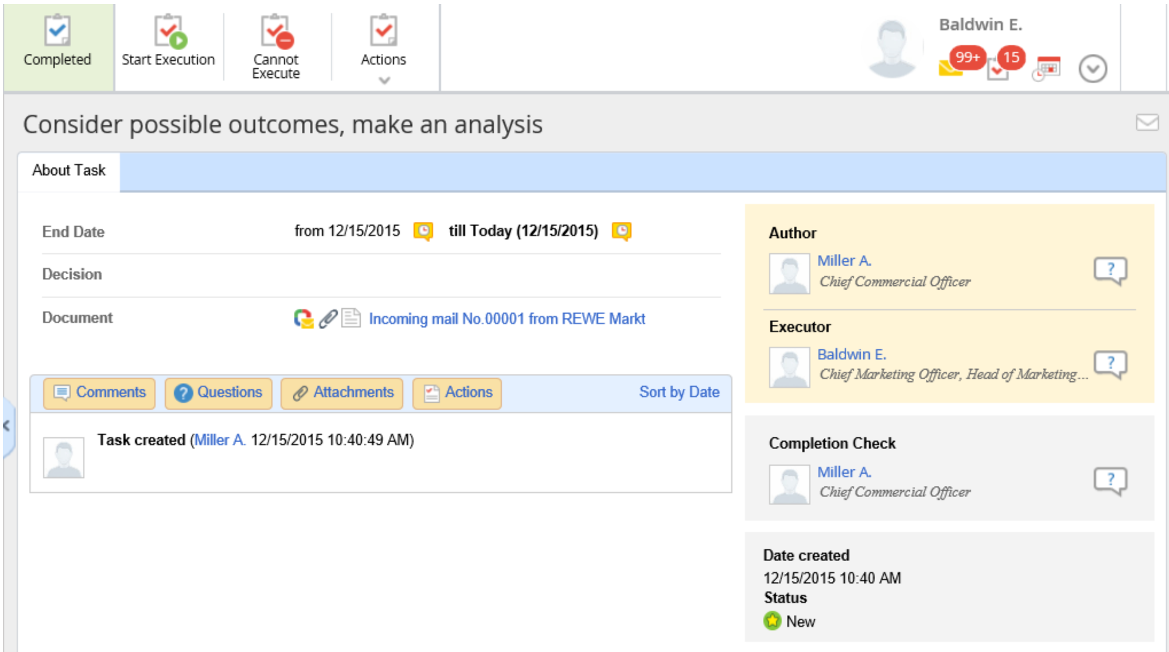


Fig. 166. Document-based task.

All the task assigned in the course of document consideration are displayed in the document page, in **Consideration** and **Tasks** tabs. All the decisions are also available in the **Consideration** tab (Fig. 167).

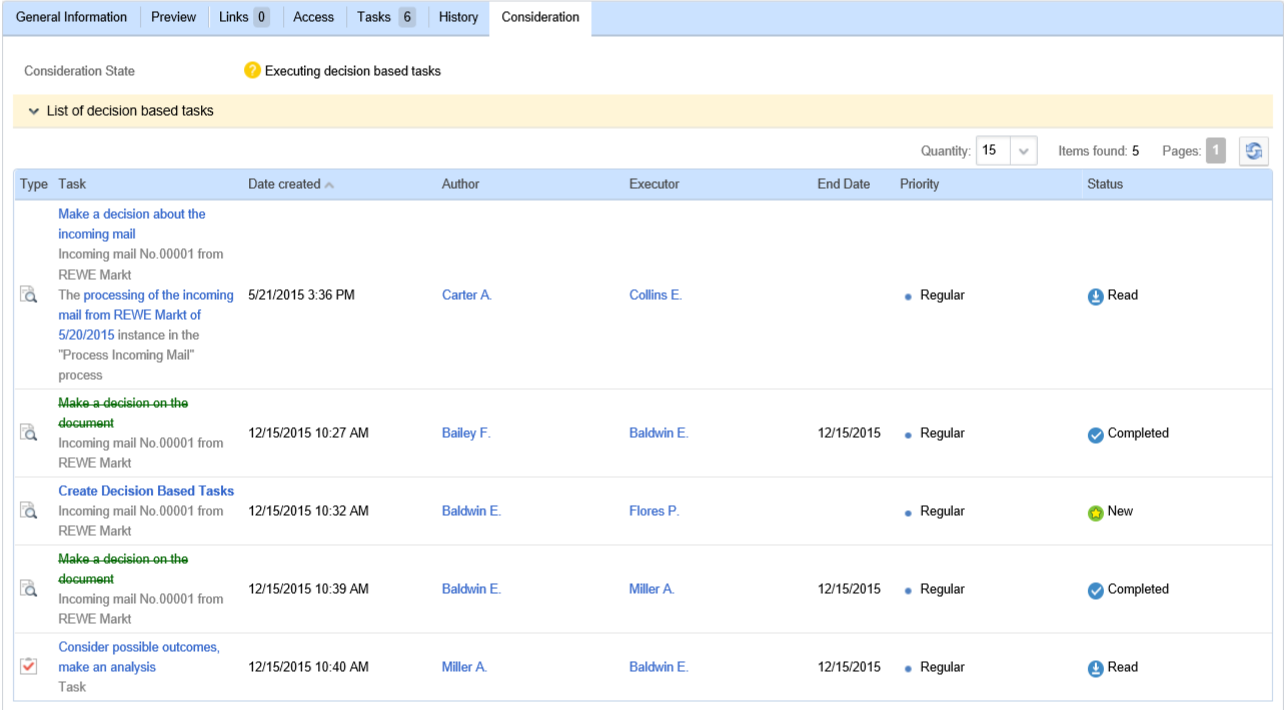


Fig. 167. Document page. Consideration tab.

5.4 Discussion

In **ELMA**, you can discuss a document with one or several users. All the comments are visible in the message feeds of each participant, and are stored in the document history.

To open a discussion, click **Send** in the document page top menu and select **Discuss Document** (Fig. 154). The document discussion form will appear (Fig. 168).

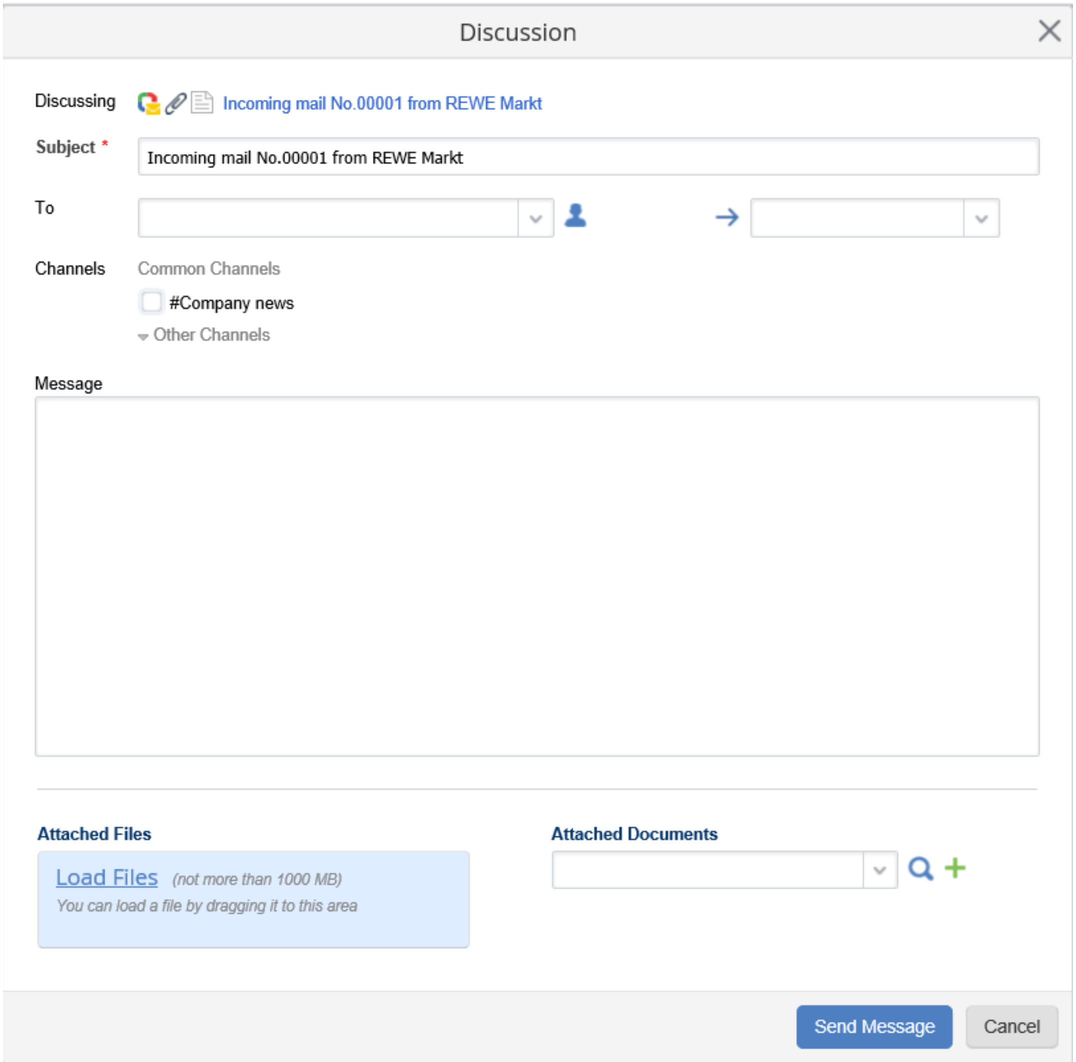


Fig. 168. Document discussion form.

In this form fill in the following fields: **Subject** (the default subject is the document's name) and **To** (select users or user groups who will participate in the discussion). Then introduce the message, and attach related files or documents, if needed.

If you want to discuss the document in a public channel, select the channels from the list of the available public channels (to learn more about how to create and use the public channels, see **ELMA Help**). You can send the document for discussion both to a list of users and to public channels at the same time.

To start the discussion click **Send Message** in the top menu (Fig. 168). The other participants then receive a new message containing the document in question in their message feed (Fig. 169).

Fig. 169. Notification about a discussion.

The history section of the document page will feature the discussion right from the start, including all the comments made (Fig. 170). The **Go to message** link opens the discussion and allows you to make a comment.

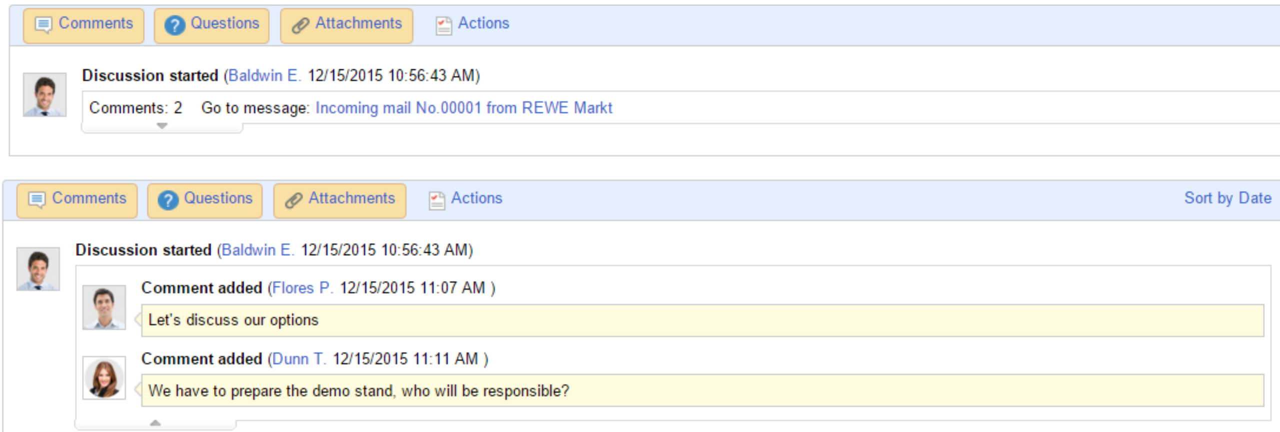


Fig. 170. Discussion in the History tab with comments collapsed and expanded.

5.5 Signing a Document

In **ELMA,** when you sign a document, you sign its current version, the further versions you upload will not be automatically signed. It is possible to sign with a digital signature or without it, simply marking the document as signed, but not adding an actual signature (see section 12.2). By signing, you approve a document version. Company policies might require for documents inside the company to be signed. A signed document version cannot be modified.

Let's take a **File** document type as an example to see how a document is signed without a digital signature. This requires privileges to sign, and access permissions of a level not lower than **Edit**.

Signing privileges are managed **Administration** → **Document Management** → **Document types** → **File**, **Permissions to Sign** tab (Fig. 171).

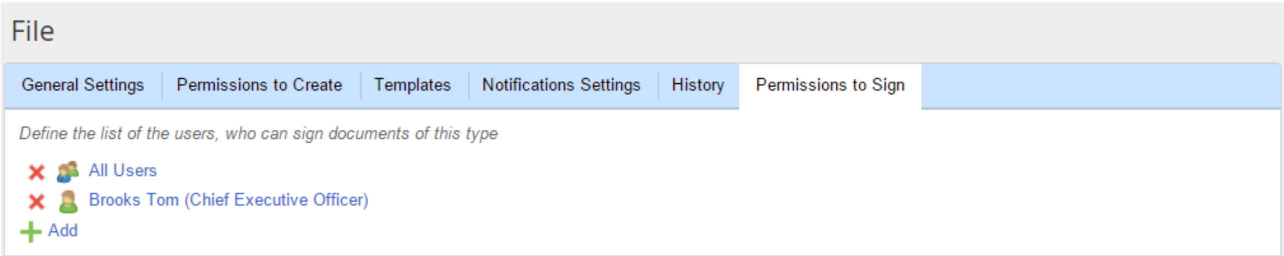


Fig. 171. File document type settings. Permissions to Sign tab.

By default, users do not have permissions to sign custom design documents created in ELMA Designer.

If a user is given signing privileges, the **Sign Document** option becomes available to them in the document page, in the **Actions** button drop-down menu. If permissions are configured as shown in Fig. 171, only the CEO will have the signing privileges for the **File** document type.

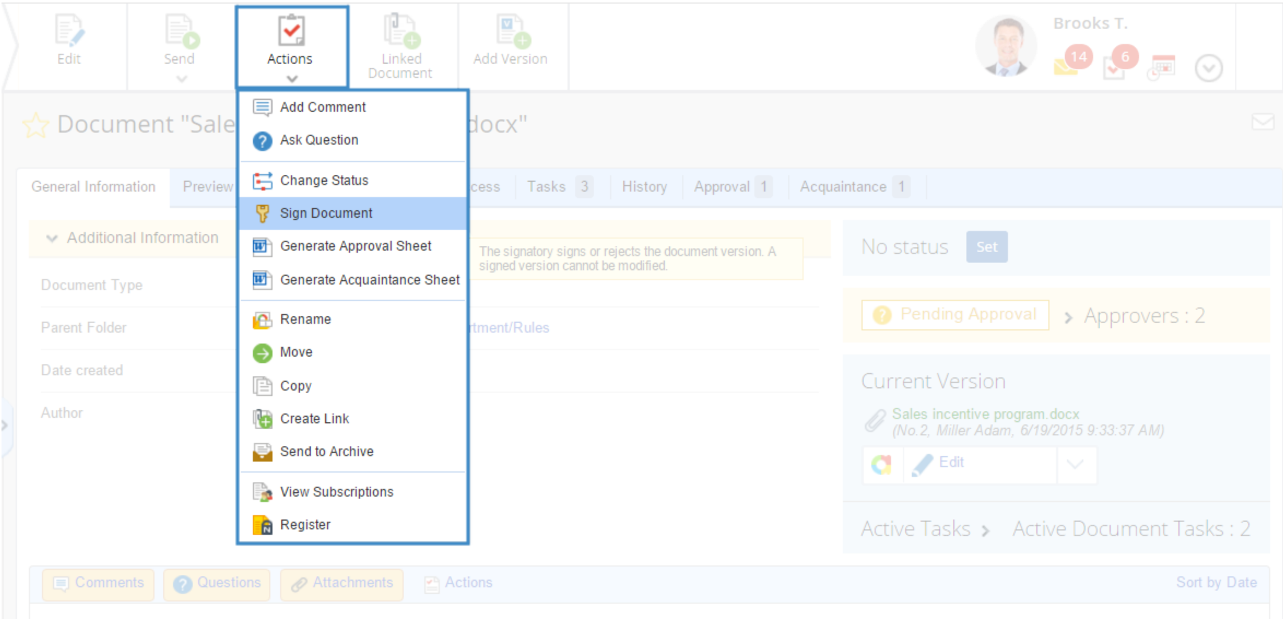


Fig. 172. Sign Document option in the Actions menu.

When you select **Actions** → **Sign Document**, the **Sign Document Version** form appears (Fig. 173). Left-click on the document version to select it (it will be highlighted and marked in different color) and add a comment if necessary. To finish, click **Sign Document Version**.

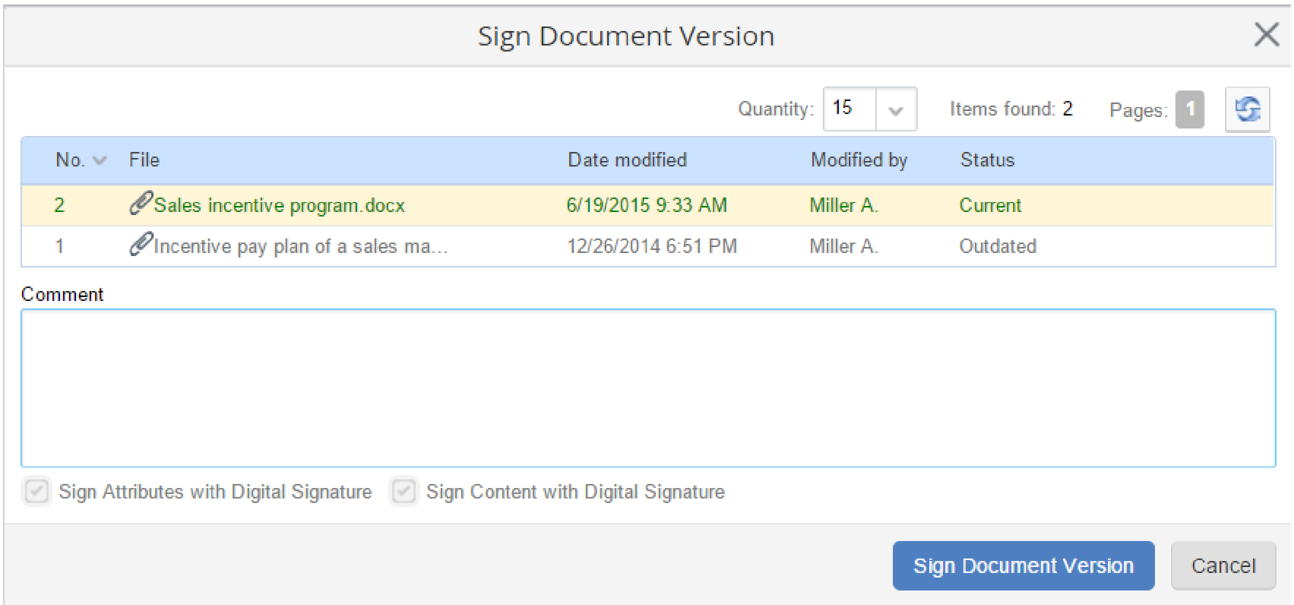


Fig. 173. Sign Document Version form

A signed version is marked with (Fig. 174). The number in brackets stands for the number of signers and is a link to a window offering brief information about the signers, the digital signature if any, date of signing, and possible comment made (Fig. 175).

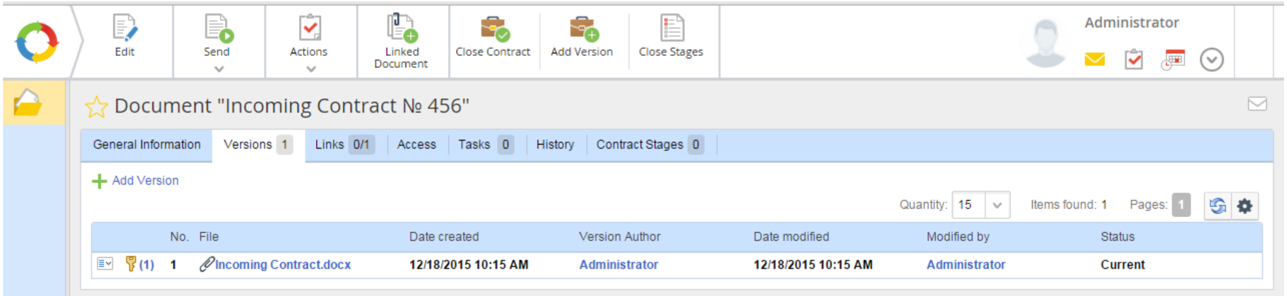


Fig. 174. Document page. Versions tab.

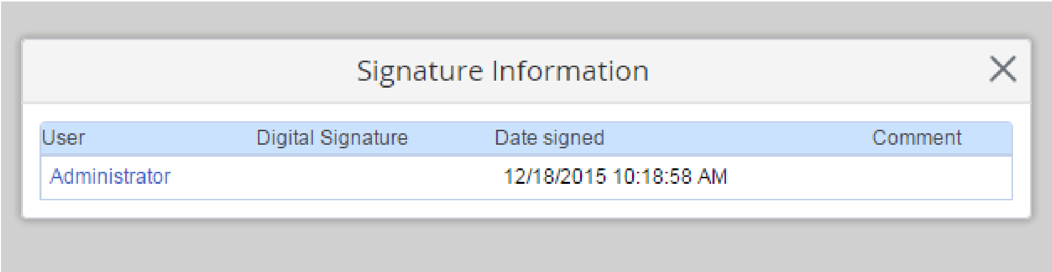


Fig. 175. Siganture Information.

Chapter 6. Document Archive

The **Document Archive** is a subsection in **ELMA** that stores outdated or unused documents, directed there by users (Fig. 176). The **Archive** is located in the **Documents** section.

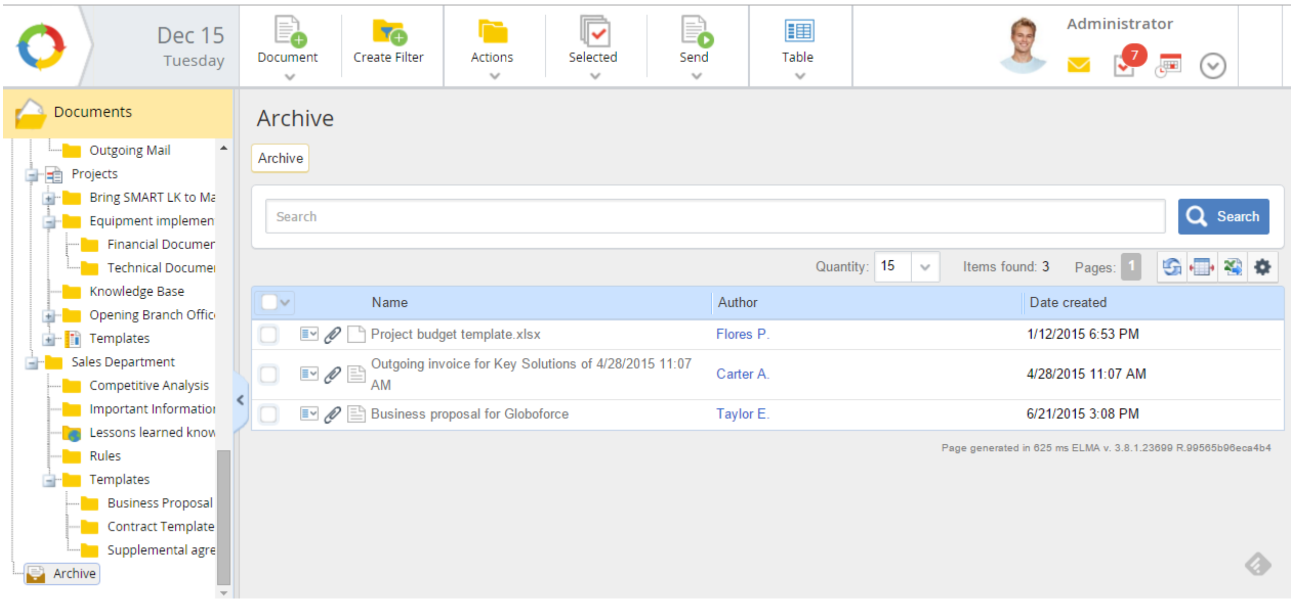


Fig. 176. Archive subsection.

The **Archive** becomes available to a user if they have access permissions to **View/Load** or higher. By default, ELMA Administrator has full access to the document archive.

With certain permissions, you can restore or delete documents from the **Archive**.

To send a document to the **Archive**, you need to have **Full Access** to the document as well as rights to edit the document's parent folder.

To move a single document to the **Archive**, use the **Move to Archive** button in the document's context menu, or the **Send to Archive** option in the **Actions** button drop-down menu in the document's page (Fig. 177).

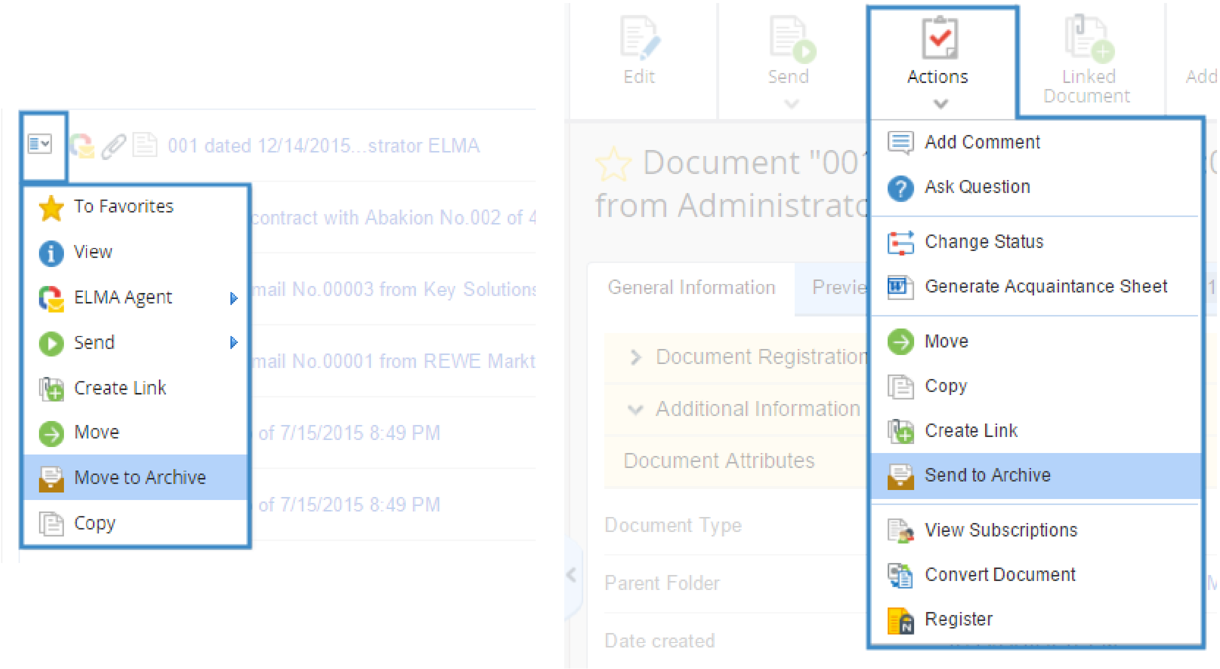


Fig. 177. Buttons for directing a document to Archive.

It is also possible to send various documents to the **Archive** at once. Go to the folder where the documents are stored, select the checkboxes of the documents in question, then go to **Selected** → **Send Documents to Archive** (Fig. 178). A confirmation window will appear.

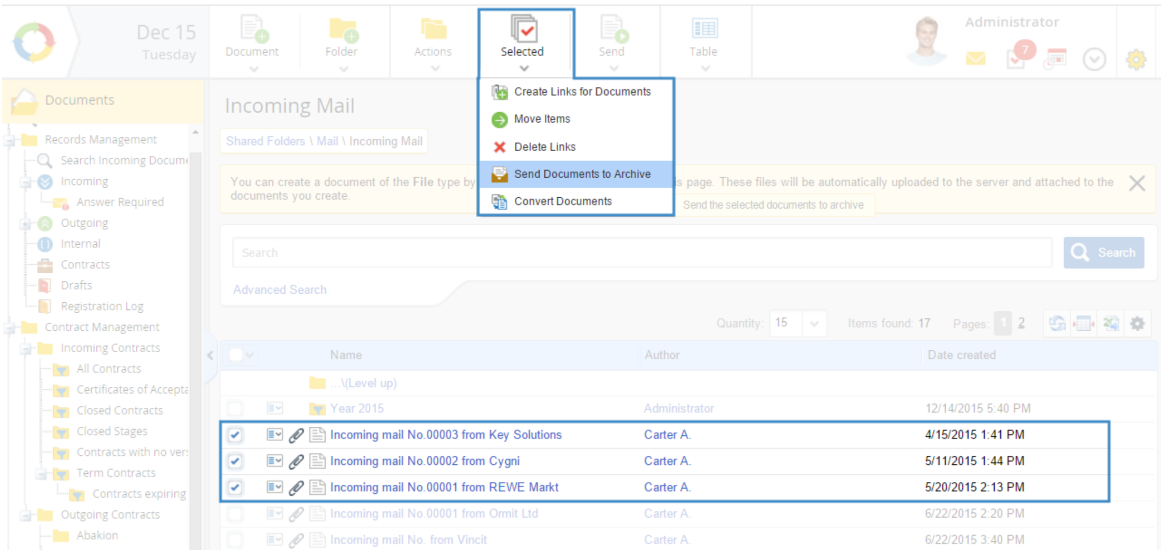


Fig. 178. Sending a list of document to the Archive.

When a document is placed in the **Archive**, the **In Archive** section is added to its page (Fig. 179).

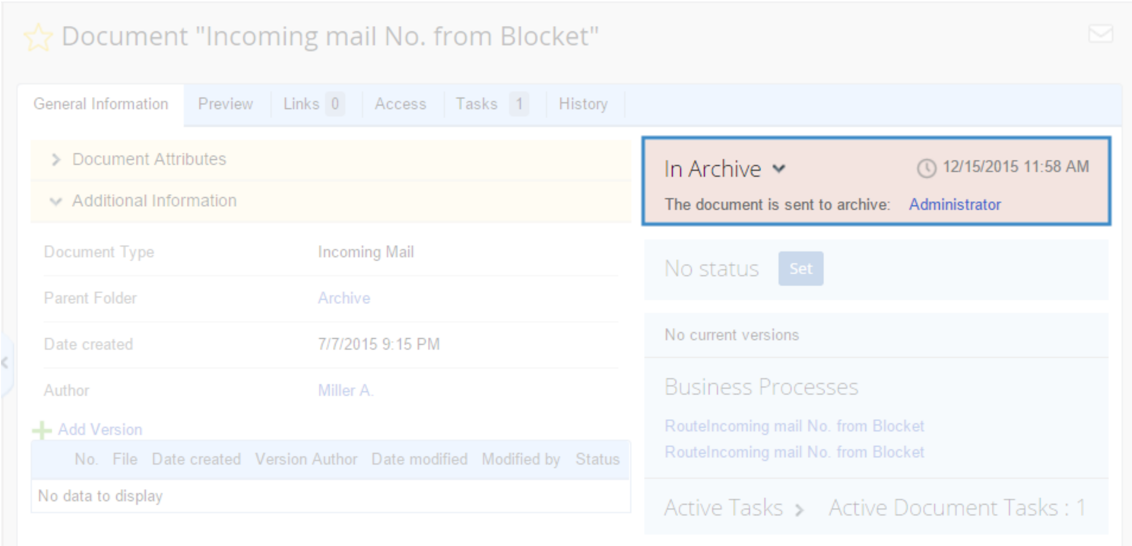


Fig. 179. Document page. In Archive section.

To restore a document from the **Archive**, find it in the document list and click **Restored from Archive** in its context menu, or go to the document page and click **Actions → Restored from Archive**.

Documents are restored to their previous folders, their history now including information about being sent to the archive and restored.

In **ELMA** you can only delete documents that are in the **Archive**. To delete a document from the **Archive**, a user needs corresponding access permissions. By default, it is available to the users who belong to the **Administrators** group. Access permissions to delete documents are managed in **Administration → Document Management → Permissions for Accessing "Document Management" Section → Allow to delete documents**.

To delete a document, use the **Delete** option in the context menu, or go to **Actions → Delete Document** in the document page.

Chapter 7. Additional Features of Records Management

7.1 Reserving Registration Number

ELMA provides a possibility to reserve registration numbers. These numbers are then stored in the system until they are used.

To enable this feature in the Records Classification Scheme, go to Category settings (see section 3.3.2) and set the **Allow to reserve the number** option to **Yes** (Fig. 198). The Records Classifications Scheme must not be published. Reservation is available for both automatic and manual numeration of documents. After changing the settings, publish the Records Classification Scheme.

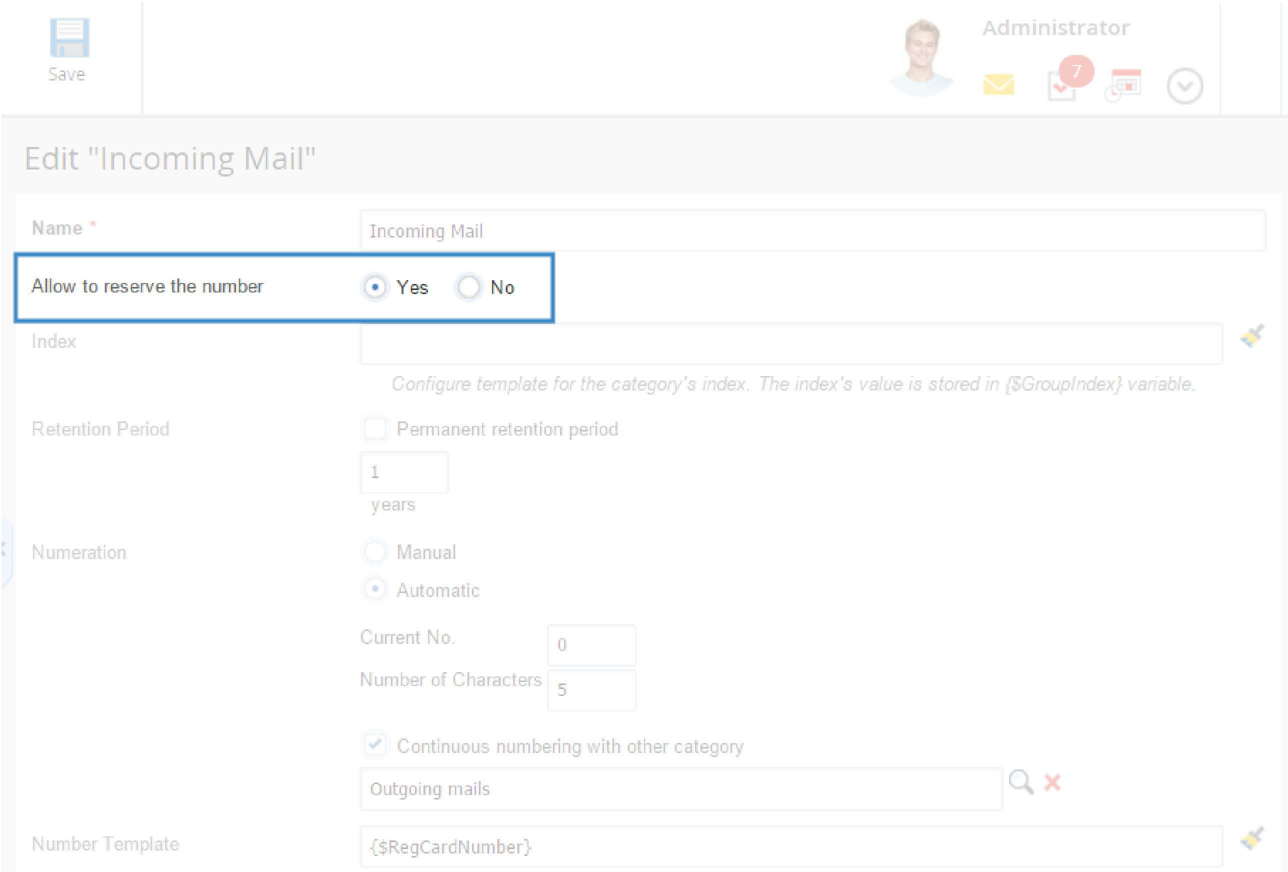


Fig. 180. "Allow to reserve the number" option in the Records Classification Scheme settings.

This feature is rather useful for documents that go through long approval and signing procedure prior to getting registered (such as outgoing contracts). It maintains the order of registration numbers and dates.

Access to **Documents** and **Record Management** is required to reserve registration numbers.

To reserve a number, go to **Records Management** and select **Reserve Number** in the **Register** button (Fig. 181) or click Reserve number in the **Document Management** portlet (on the **Documents** page).

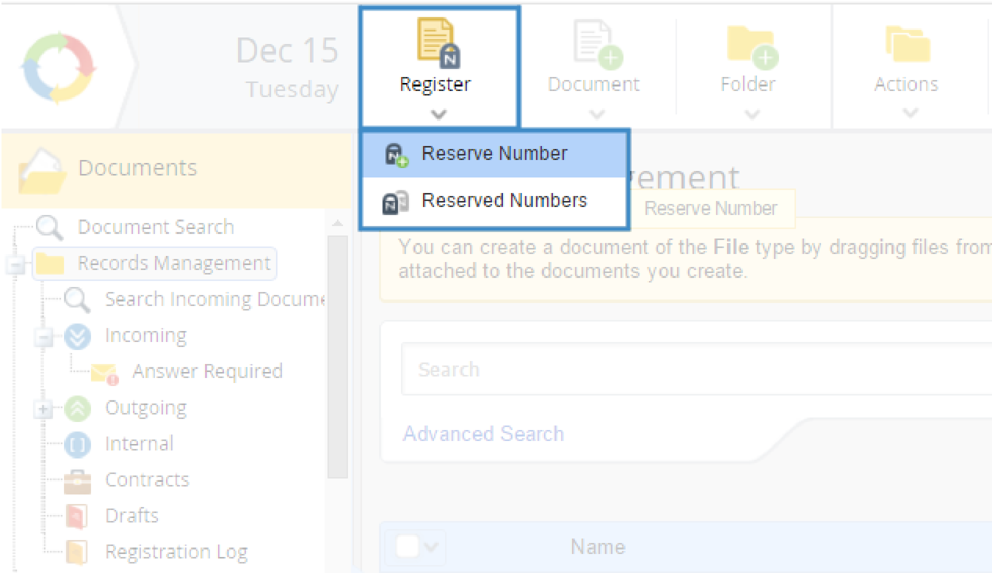


Fig. 181. Reserve Number button.

The **Reserving a registration number** window will open (Fig. 182). Here, you have to select a registration variant. If there is no registration variant available for your document, click **Manual Registration** (Fig. 183).

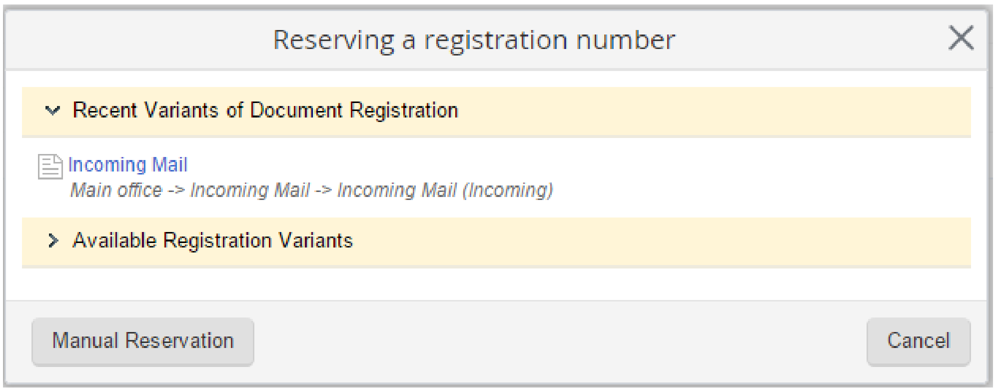


Fig. 182. Reserving Registration Number form.

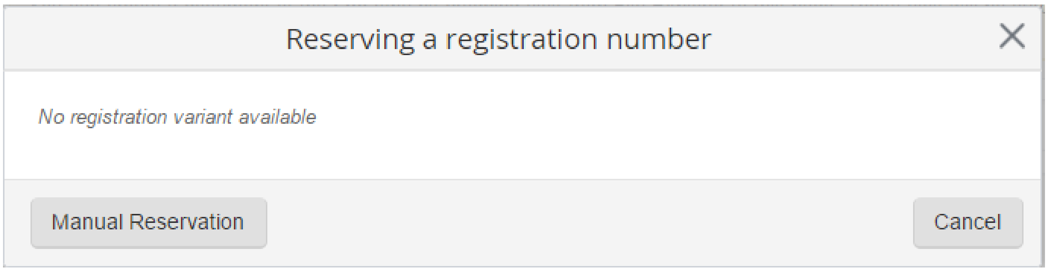


Fig. 183. Reserving Registration Number form. No registration variant available.

If you select a variant with automatic registration, a confirmation window appears (Fig. 183).

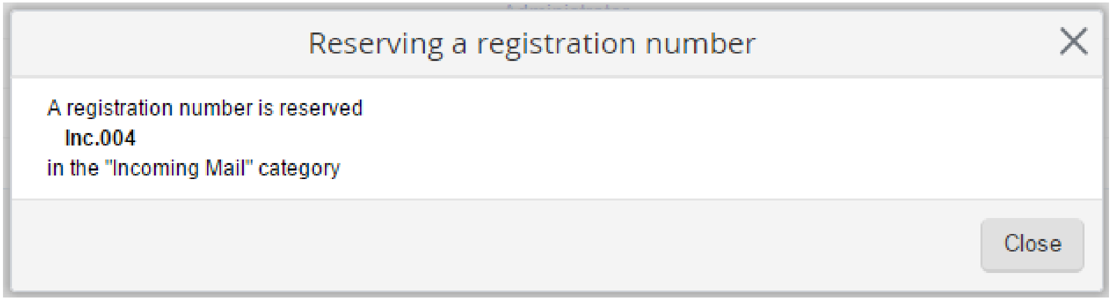


Fig. 184. Reserving a registration number. Automatic numeration.

If you select **Manual Registration**, you have to select the document type, fill in all the required fields (Fig. 185) and click **Reserve**. Then, depending on the category's numeration type, either a confirmation will appear (Fig. 183) or you will have to enter the number manually (Fig. 184).

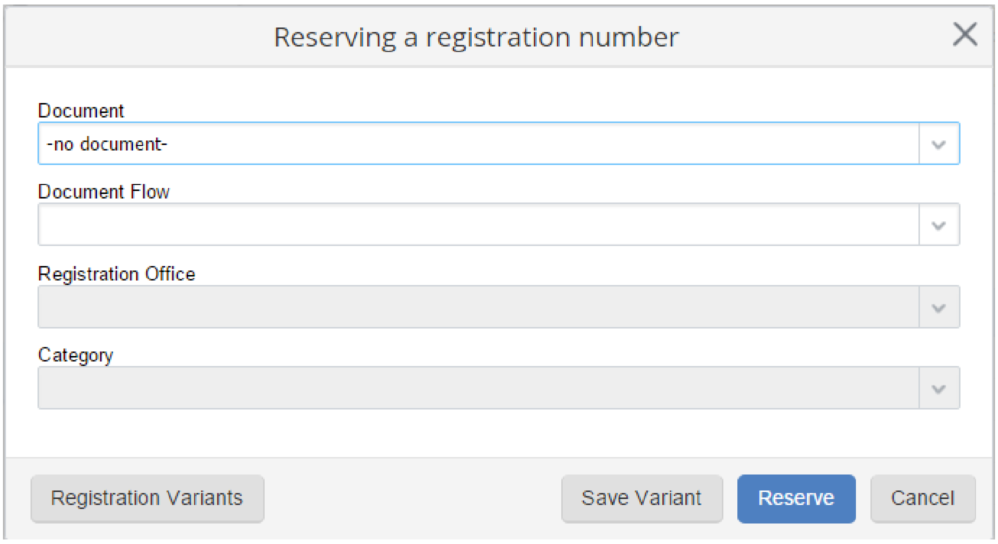


Fig. 185. Reserving a registration number. Manual reservation.

To use the reserved number, select **Use Reserved Number** when registering the document (Fig. 186) and then either select the number from the list of reserved numbers or user the button (Fig. 187).

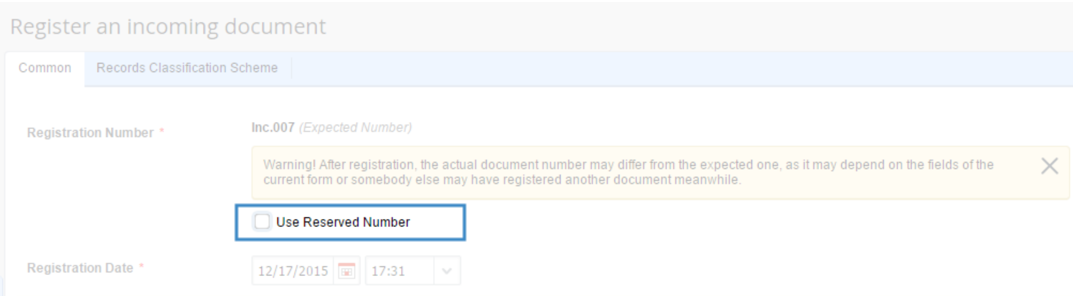


Fig. 186. User Reserved Number option

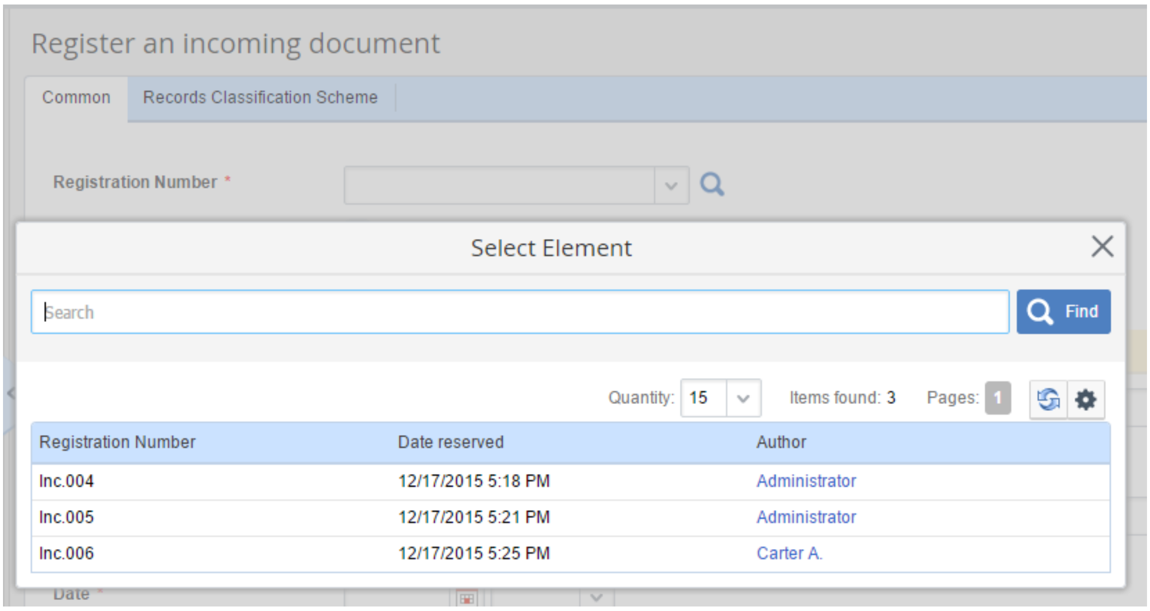


Fig. 187. List of reserved numbers.

7.2 Outgoing Document Dispatch Tracker

Some documents are sent to their addressees in printed form. **ELMA ECM+** has a feature that allows you to monitor such paper documents.

To view it, create a new document type in **ELMA Designer**, **Outgoing Mail** (section 3.1). Add the following attributes:

- ***Subject*** – **String** type, required field;
- ***Recipient*** – **Contractor** type, required field;
- ***Text*** – **Text** type, not a required field. We will use this property when considering document generation from template;
- ***In Response to*** – **Record Card Attribute** type, Outgoing record card, 'In Response to' attribute.

To enable the dispatch tracker, open the **Description** tab of the document type and select the **Dispatch tracker** checkbox (Fig. 188). Select **Yes** in the notification box that appears.

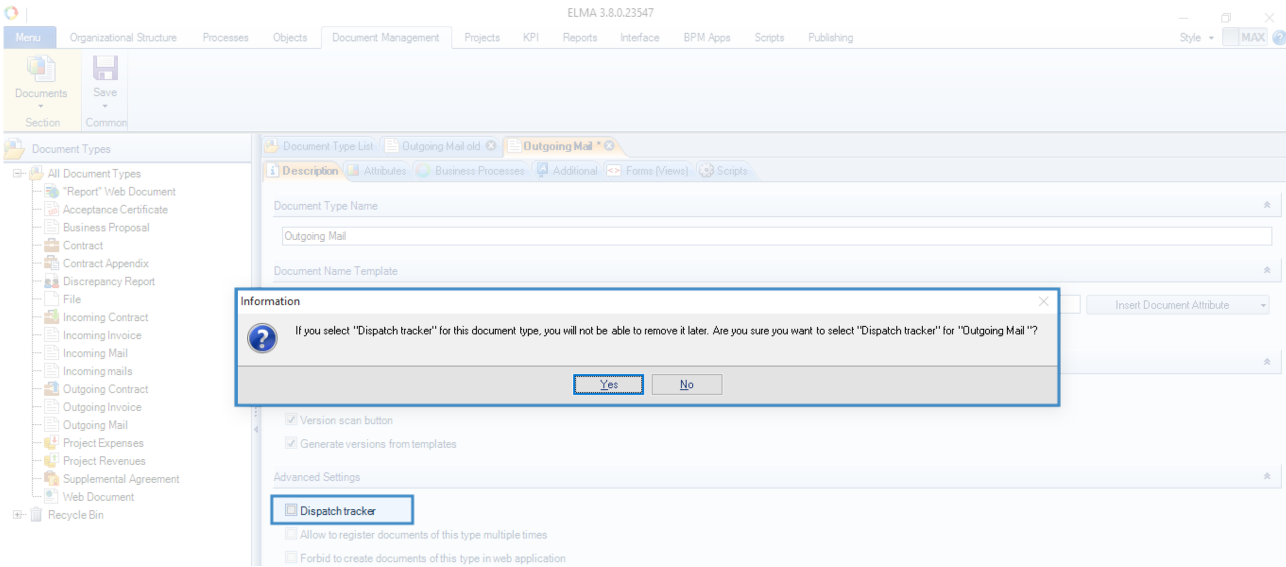
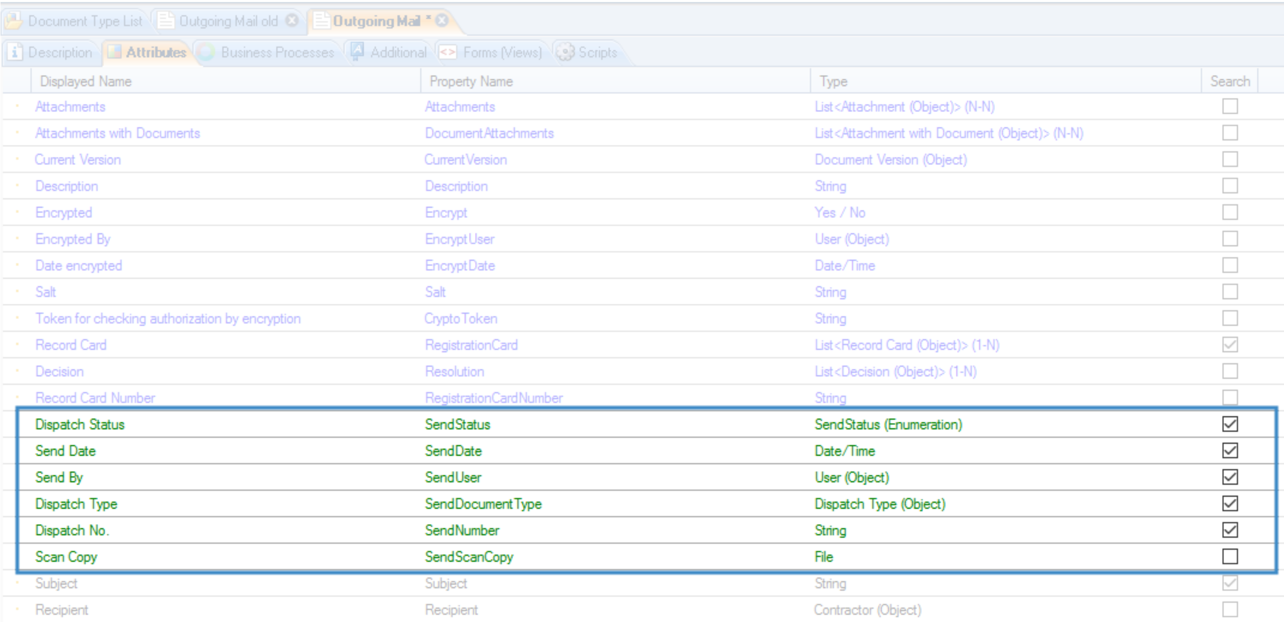


Fig. 188. Dispatch Tracker option and notification box

New attributes are created in the document type to make tracking possible (Fig. 189). They are filled in when you perform certain document tracking activities.



Displayed Name	Property Name	Type	Search
Attachments	Attachments	List<Attachment (Object)> (N-N)	☐
Attachments with Documents	DocumentAttachments	List<Attachment with Document (Object)> (N-N)	☐
Current Version	CurrentVersion	Document Version (Object)	☐
Description	Description	String	☐
Encrypted	Encrypt	Yes / No	☐
Encrypted By	EncryptUser	User (Object)	☐
Date encrypted	EncryptDate	Date/Time	☐
Salt	Salt	String	☐
Token for checking authorization by encryption	CryptoToken	String	☐
Record Card	RegistrationCard	List<Record Card (Object)> (1-N)	☑
Decision	Resolution	List<Decision (Object)> (1-N)	☐
Record Card Number	RegistrationCardNumber	String	☐
Dispatch Status	SendStatus	SendStatus (Enumeration)	☑
Send Date	SendDate	Date/Time	☑
Send By	SendUser	User (Object)	☑
Dispatch Type	SendDocumentType	Dispatch Type (Object)	☑
Dispatch No.	SendNumber	String	☑
Scan Copy	SendScanCopy	File	☐
Subject	Subject	String	☑
Recipient	Recipient	Contractor (Object)	☐

Fig. 189. Added document properties for dispatch tracking

When you have created the document type and enabled the **Dispatch tracker**, publish the document type and restart the **ELMA server**.

You also need to fill in the **Dispatch Type** entity with required values (by default, only Administrators have permissions to do that). Go to **Entities** → **Dispatch Type** and add items such as e-mail, express mail or postal service.

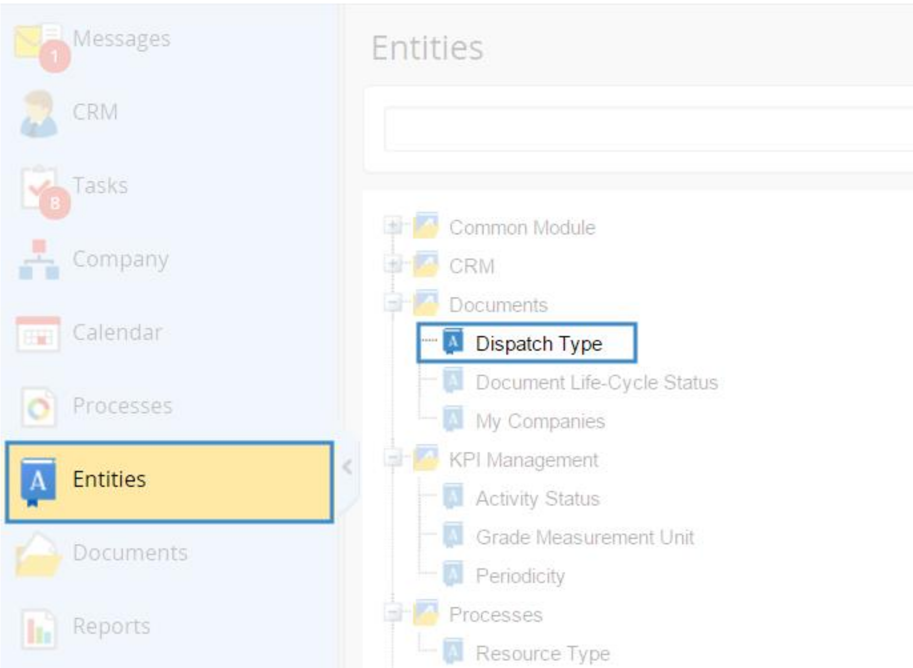


Fig. 190. Dispatch Type entity

Now, the **State the fact of dispatching** option is available for all outgoing mail. It is located in the **Actions** button of the document page (Fig. 191).

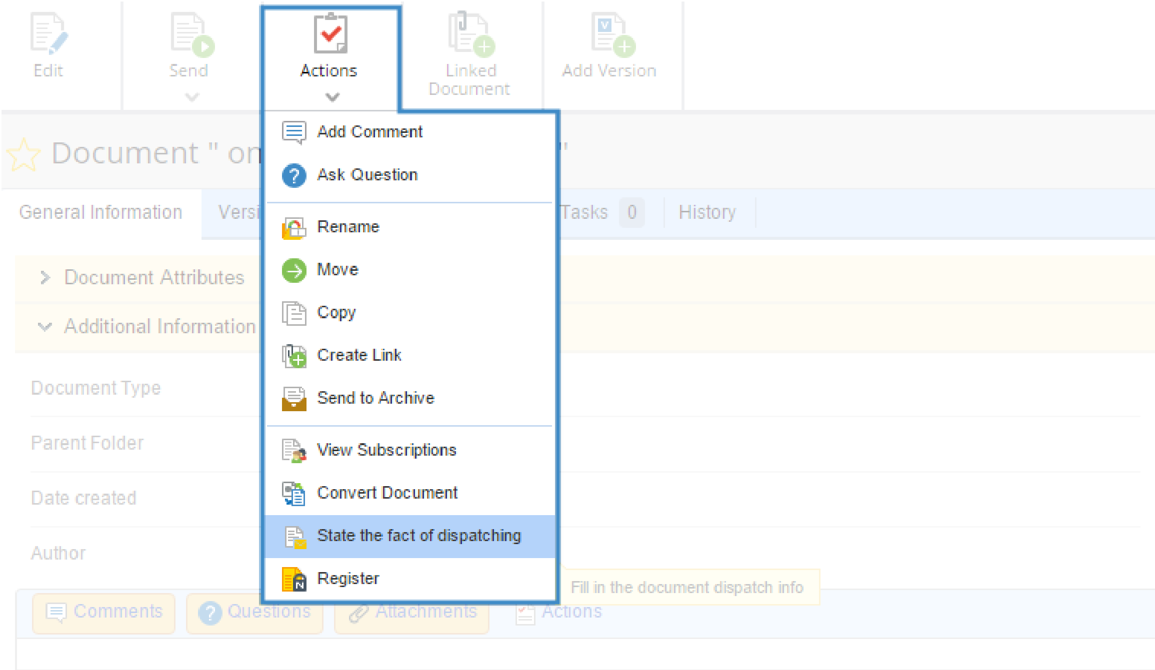


Fig. 191. Actions button, "Sate the fact of dispatching" option

The documents, whose fact of dispatching is not stated, are sent to **Records Management** → **Outgoing** → **Unsent** (Fig. 192). This sections displays documents according to the user's access permissions. Therefore, it is important to give these permissions to the users who are responsible for dispatching original documents.

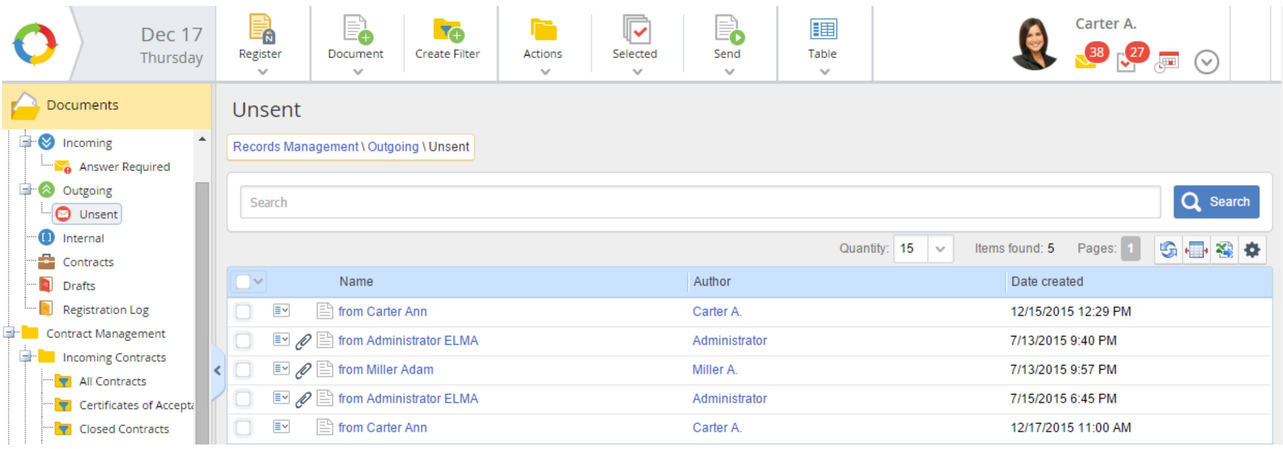


Fig. 192. Records Management → Outgoing → Unsent

When sending an original document, state the fact of dispatching in the document page. Use **State the fact of dispatching** action in the **Actions** button (Fig. 191). Enter all the necessary information in the provided **Send the document** window (Fig. 193).

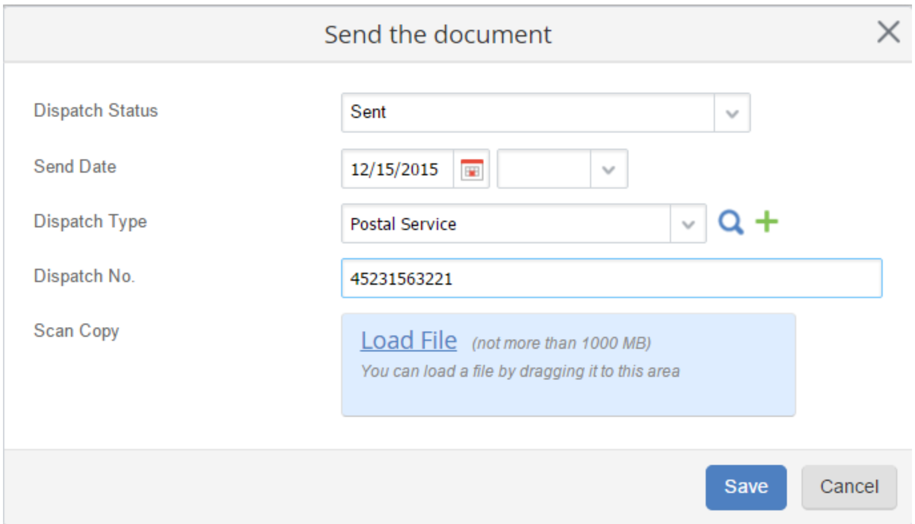


Fig. 193. Document dispatching form

When the form is filled in and the information is saved, the dispatching status section is added to the document page (Fig. 194). When you left-click on the **Sent to the Addressee** status, a window appears providing full dispatch information on the document.

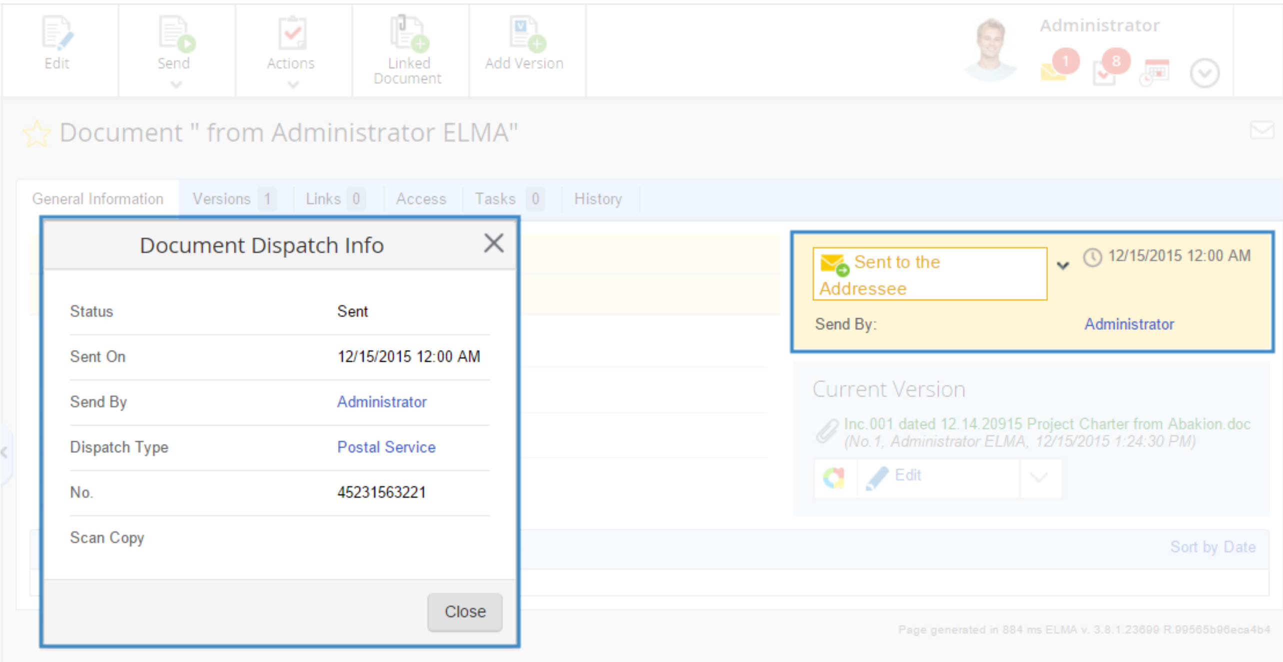


Fig. 194.Dispatching Status section and Document Dispatch Info window

Document dispatching function is most effective when used in document routing. Consider a simple route for outgoing mail: once a message is created it is sent for approval. When approved, it is directed to the sender, the CEO. Then the secretary registers the message and directs it to the addressee. The routing process map is shown in Fig. 195.

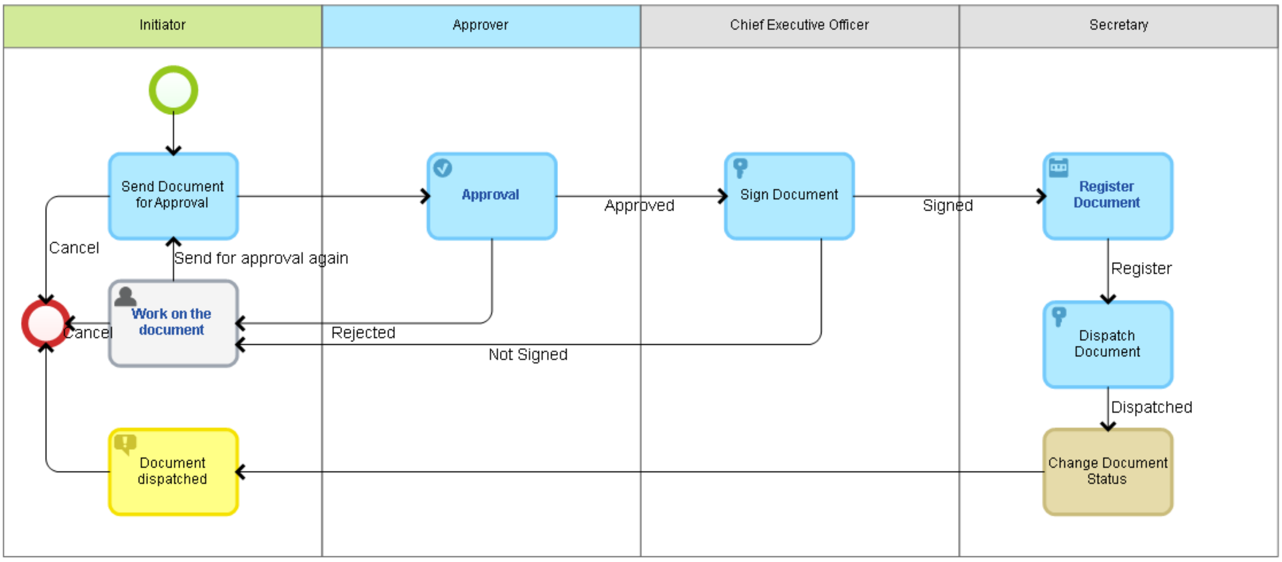


Fig. 195. Process map of Outgoing Mail process

The **Dispatch Document** and **Change Document Dispatch Status** are located in **ELMA Designer**, **Document Management → Operations with Document**. It is possible to dispatch a single document or a whole package. The basic configuration for these elements concerns specifying the context variable with the document in question. Do it in the **Document** tab of the configuration window (Fig. 196).

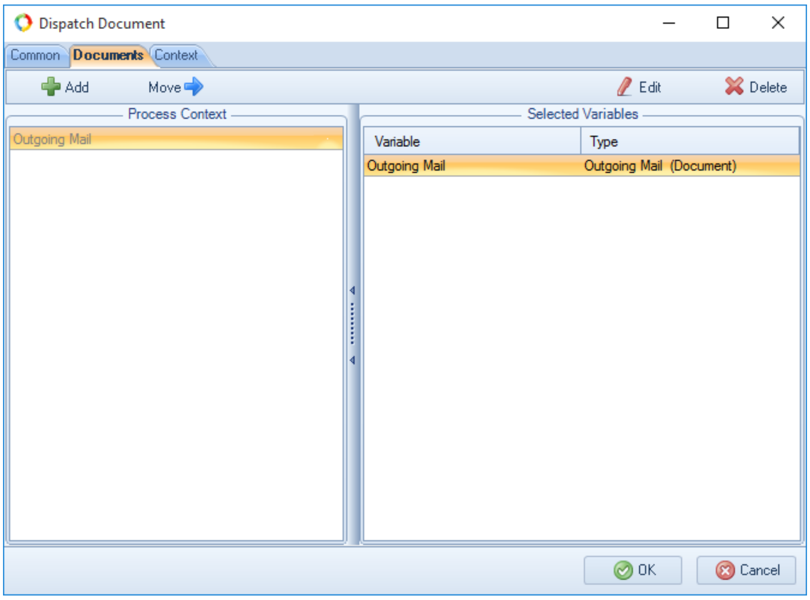


Fig. 196. Documents tab of the Dispatch Document element

In **Web Application**, the “Dispatch Document” routing task for the secretary will look as shown in Fig. 197.

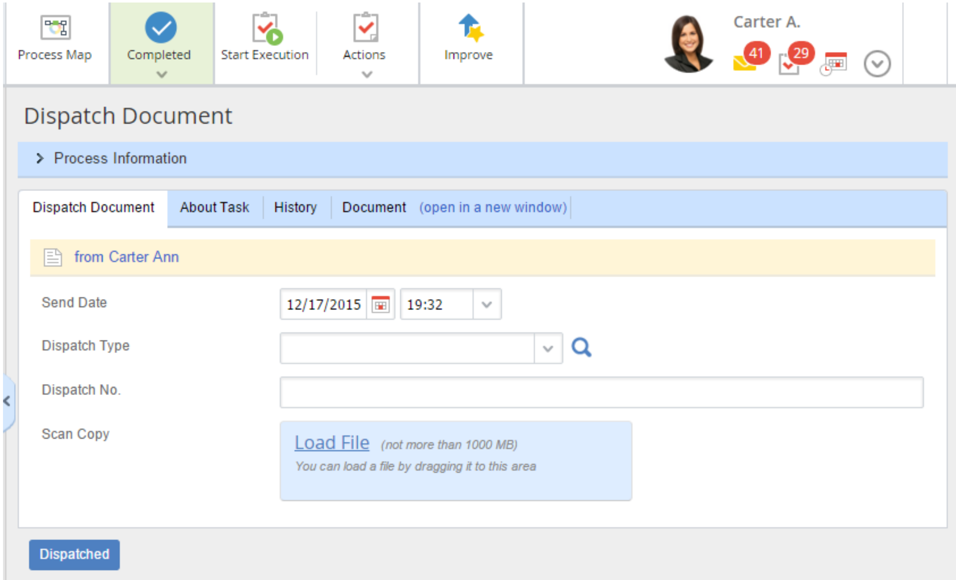


Fig. 197. Dispatch Document task

This task requires to fill in information about dispatching and click **Sent**. Dispatching info will be saved in the document page. The document receives the **Sent to the Addressee** status.

7.3 Multiple Registration of Documents

In **ELMA ECM+** you can register documents various times. This feature allows you to register a document in different categories and registration offices.

Consider the following example: a company has several branch offices. An incoming letter is received and registered in one of them. It is then sent to the main office where it is registered once again in the document management system.

You can enable this feature in **ELMA Designer** when creating a document type. Go to the **Description** tab of the document type page and select the **Allow to register documents of this type multiple times** checkbox (Fig. 198). To make the changes available, save the document type, publish it and restart the **ELMA server**.

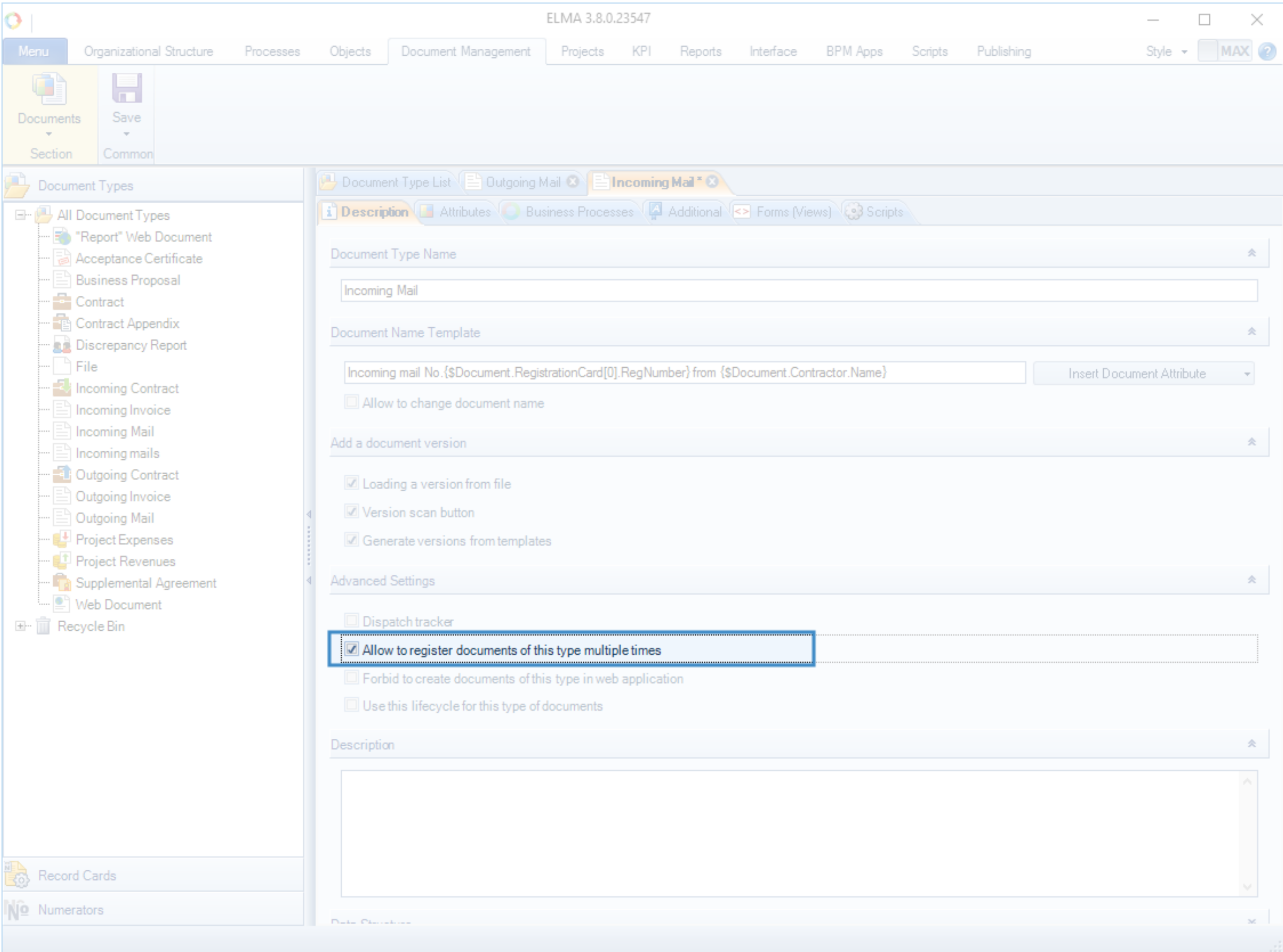


Fig. 198. Document type page. "Allow to register documents of this type multiple times" option

Each time a document is registered, a Record Card is created, and the document receives a registration number. The document can be included in several filter folders of the **Records Management** section, according to the document flows that is belongs to.

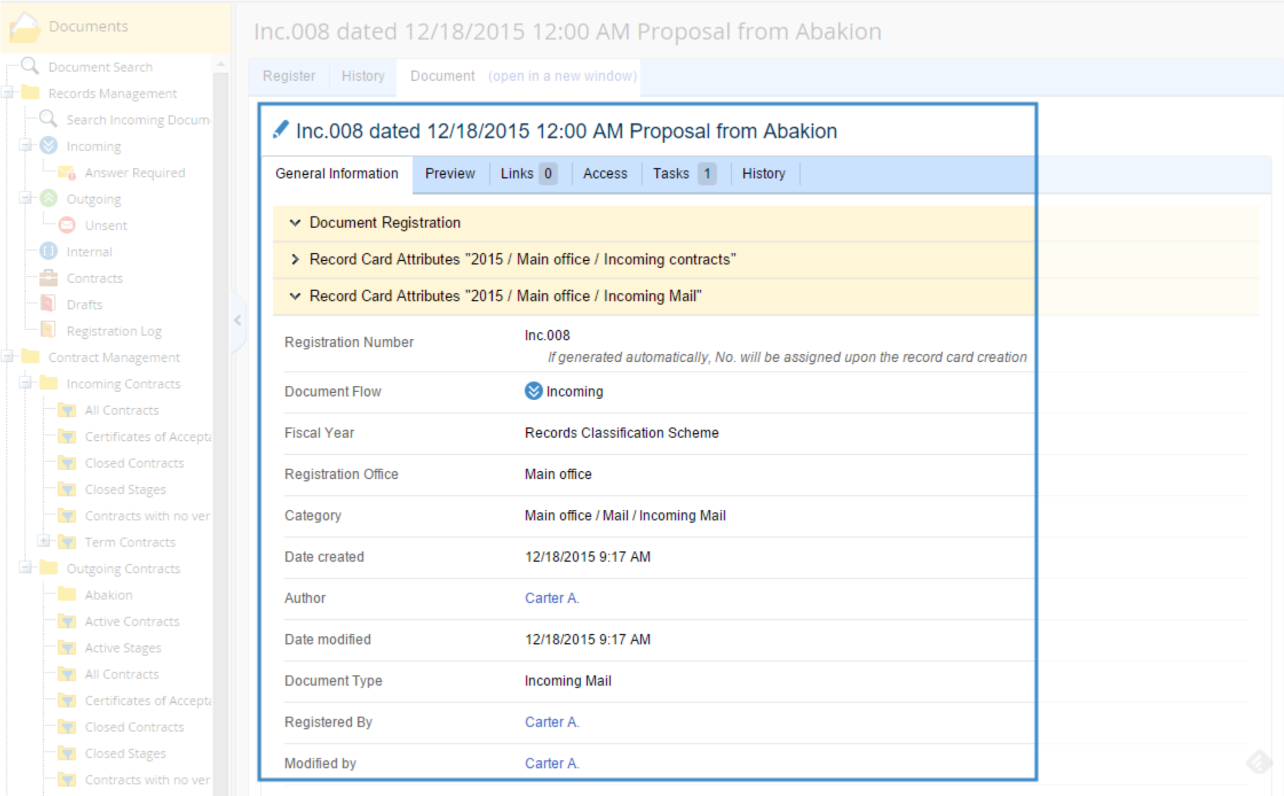


Fig. 199. Page of a document registered twice

Chapter 8. Document Search

ELMA features quick, advanced or full text search.

You can open the **ELMA** document search form (Fig. 200) in:

- The main menu. Select **Documents** → **Document Search**;
- The **Document** section of the left menu, either from its main page or the **Document Search** subsection;
- Any directory of the **Documents** section. In this case, document search is limited to the current folder.

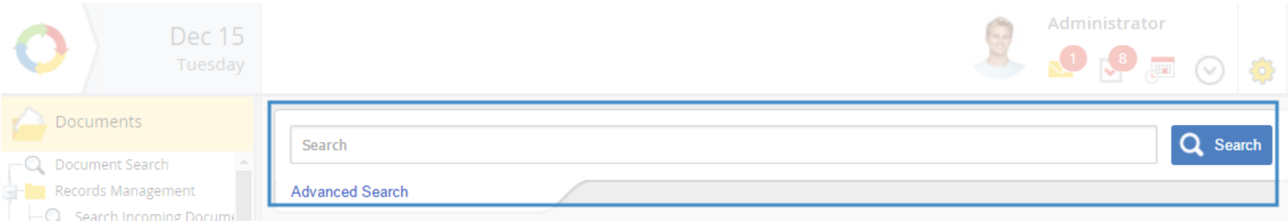


Fig. 200. Document search form

You can also add a **Document Search** portlet containing the search form to the main page (Fig. 201). For more information on portlets and their settings see **ELMA Help** and **ELMA BPM Platform** quick-start manual.

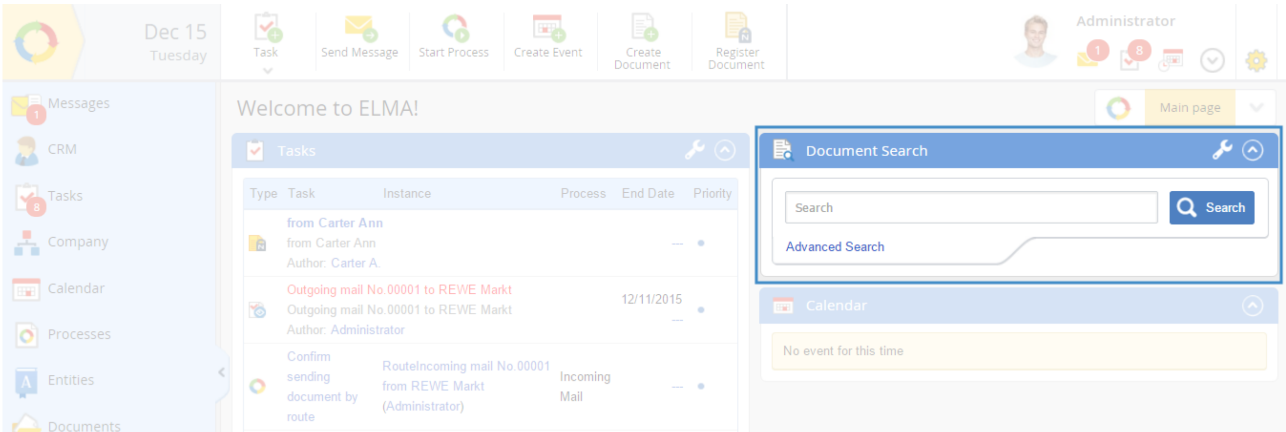


Fig. 201. Document Search portlet on the main page of ELMA Web Application

8.1 Quick Search

With Quick Search you can find a document by just a word or a phrase from the document's name, or string properties that participate in quick search.

To make a property available for quick search, go to the document type page in **ELMA Designer**, open its settings and select the **Patriciates in Quick Search** checkbox in the **More** tab (Fig. 202). This option is only available for String and Text properties.

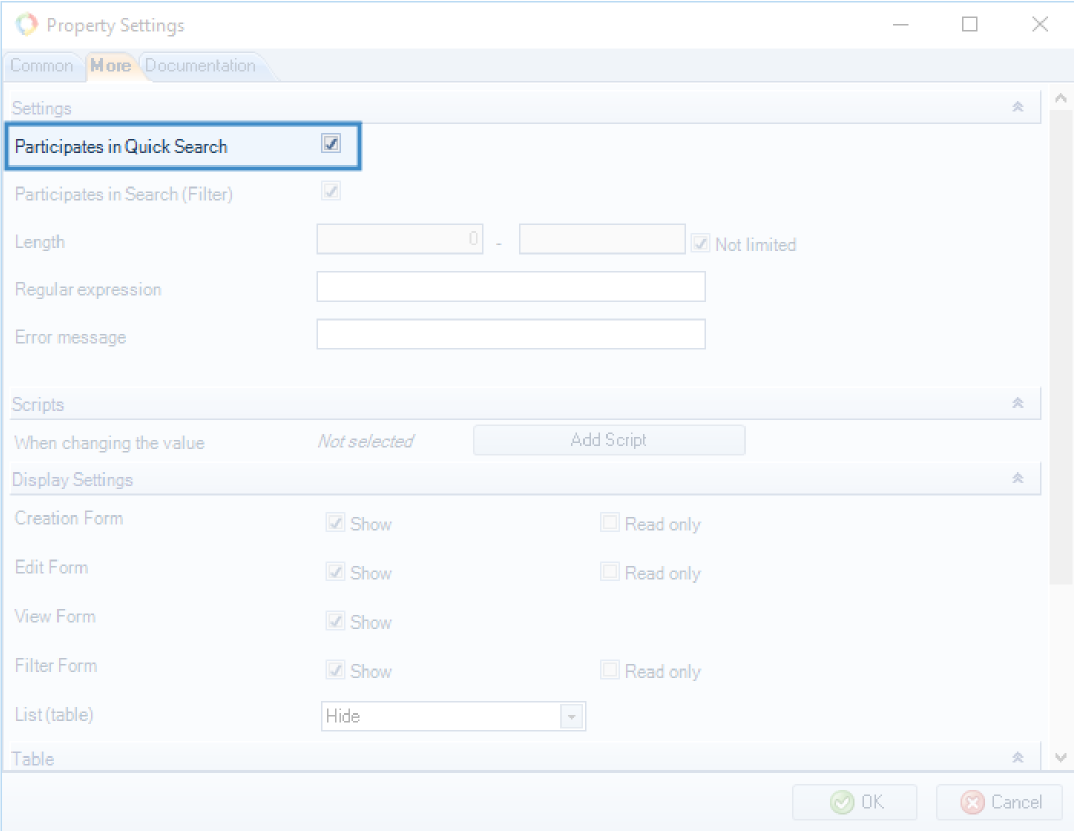


Fig. 202. Property Settings. "Participates in Quick Search" option

To perform a quick search, type a word or part of a phrase in the search filed (it is non case-sensitive), then click the **Search** button (Fig. 200) or press **Enter** on your keyboard.

The results will contain only those documents that the current user has permission to **View/Load** or higher (Fig. 203).

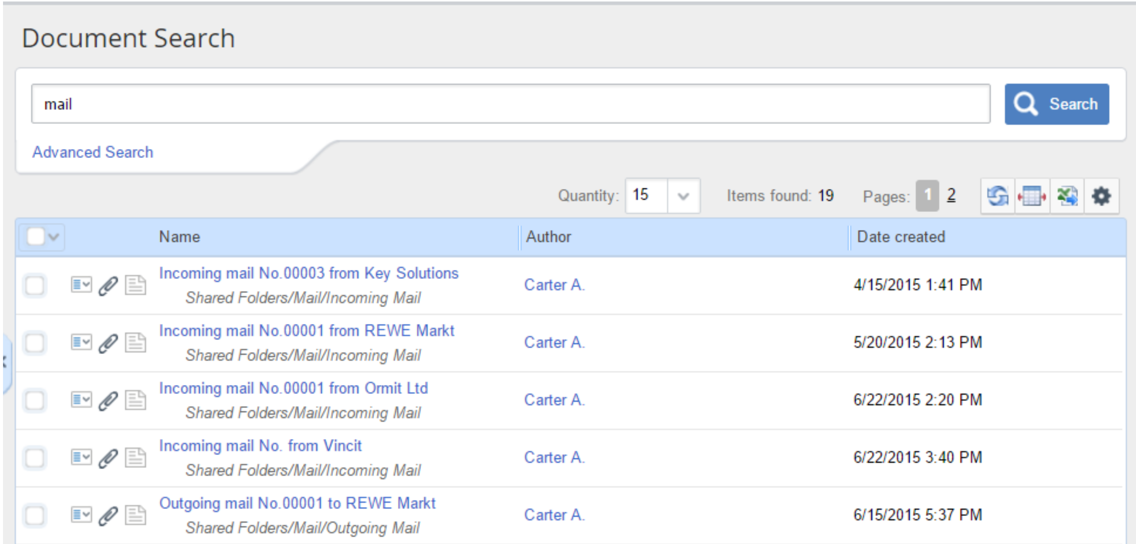


Fig. 203. Quick Search results

You can expand the quick search by adding more properties: add the document registration number and contractor's name to the document naming template (similar to the **Incoming Mail** document template).

8.2 Advanced Search

With advanced search you can filter documents by a set of parameters.

To open the advanced search form, click **Advanced Search** in the quick search form (Fig. 204).

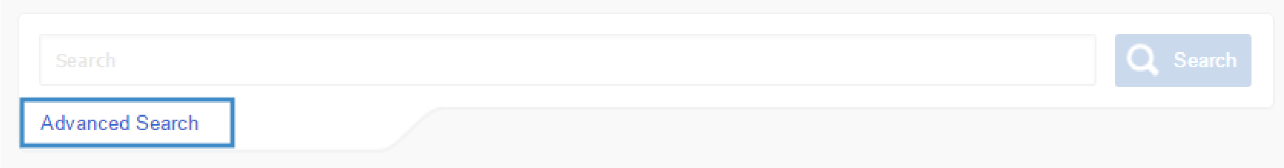


Fig. 204. Link to open the Advanced Search form

The advanced search page consists of a field group, containing document attributes that participate in the search (Fig. 205). The page is divided into four sections: the quick search filed, **Folder** selection, **Document Attributes** panel and **Record Card Attributes** panel (when the form opens, this section is collapsed).

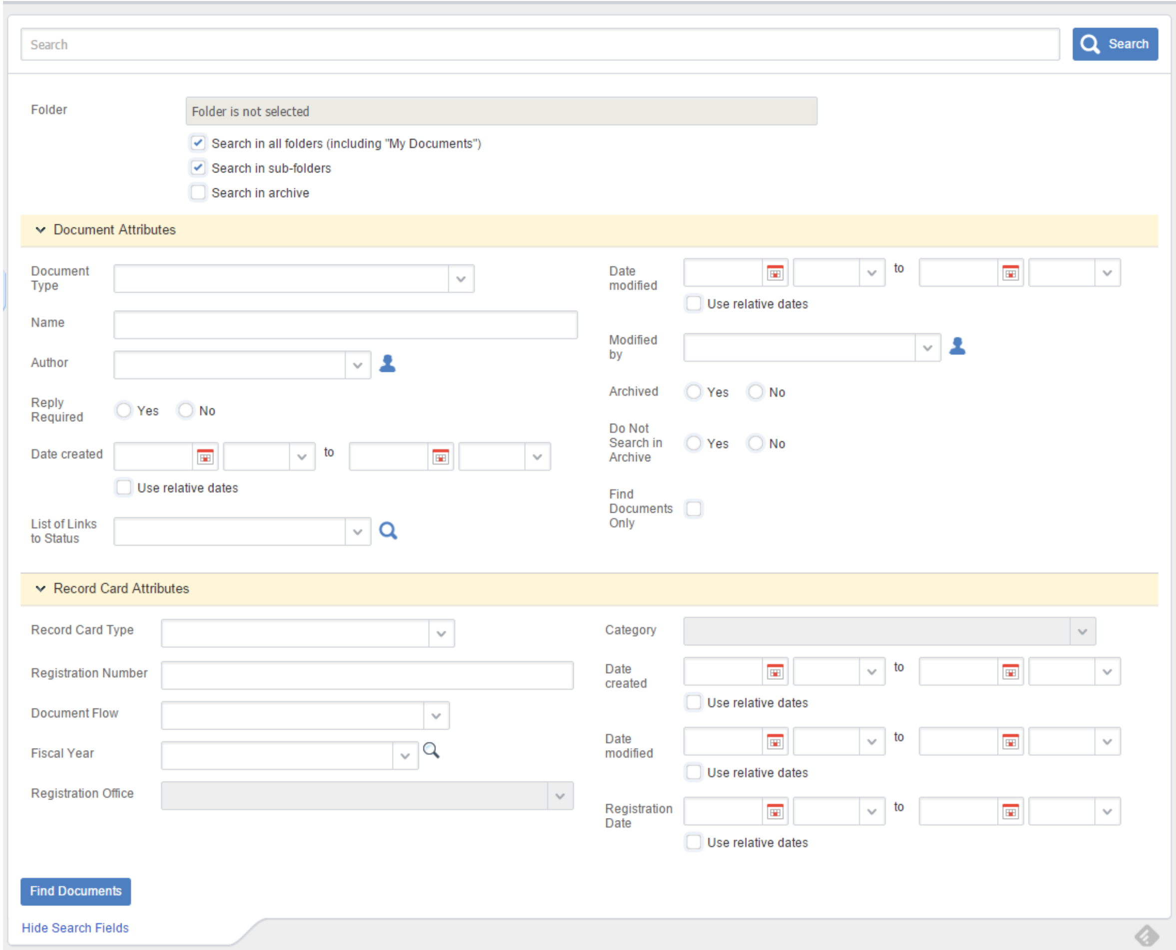


Fig. 205. Advanced Search form

When several of these properties are filled in, **ELMA** searches for the documents that feature all of them. For example, if you enter the author and specify creation dates, the results will contain a list of documents created by this exact author throughout the given period.

When you select a certain document type, fields with properties available for search appear. Specify these properties for each document type in the **More** tab of their settings window in **ELMA Designer.** Selecting the **Participates in Search (Filter)** checkbox in the Property Settings page (Fig. 206).

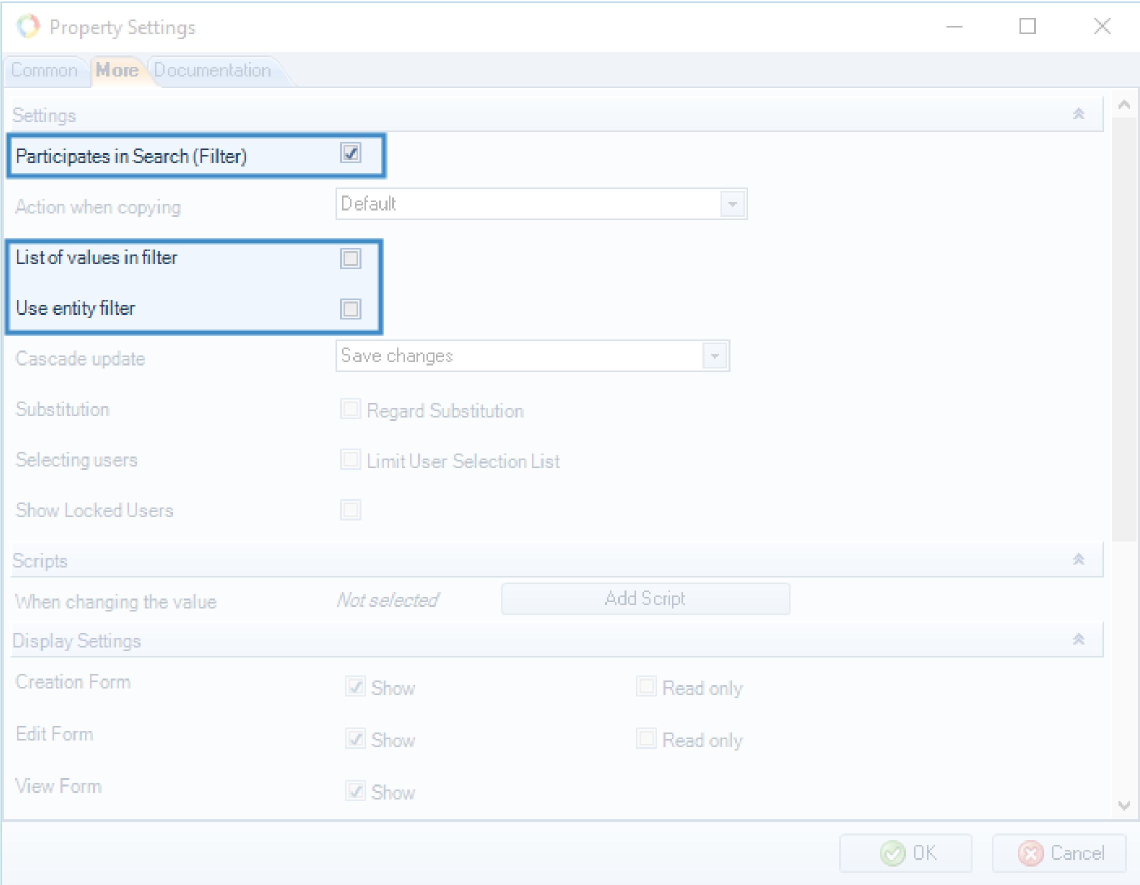


Fig. 206. Property settings, search options

In case of **Incoming Mail**, you have previously enables this option for **Subject**, **Sender**, **Incoming Number** and **Date**. Now, if you select this document type in advanced search, additional fields for filtering will appear. By selecting the **List of values in filter** checkbox, you can search by one or by various values, for example, by several senders.

When configuring a document type, consider which properties might be required for advanced search, and set them accordingly. Later on, you can modify search fields for the added properties.

Once all the changes are done, save the document type and restart the **ELMA server**.

8.3 Full Text Search

Full Text Search is available in the **Standard** and **Enterprise ELMA** Editions (version 3.6 and higher) if additional software is installed and configured. Full Text Search is performed by the following document properties:

- title;
- author;
- name of the folder where the document is stored;
- name of the category where the document is registered;
- current version content.

Search by content is available for most text formats and for the Microsoft Office formats.

To perform the full text search, go to the **Documents** section and in the search field type a word or phrase that the document's title or text might contain. Then click **Search** or press **Enter**. A table will appear under the search filed (Fig. 207) displaying all the documents that contain the specified parameter. Words that completely or partially match the keyword that you entered are highlighted yellow.

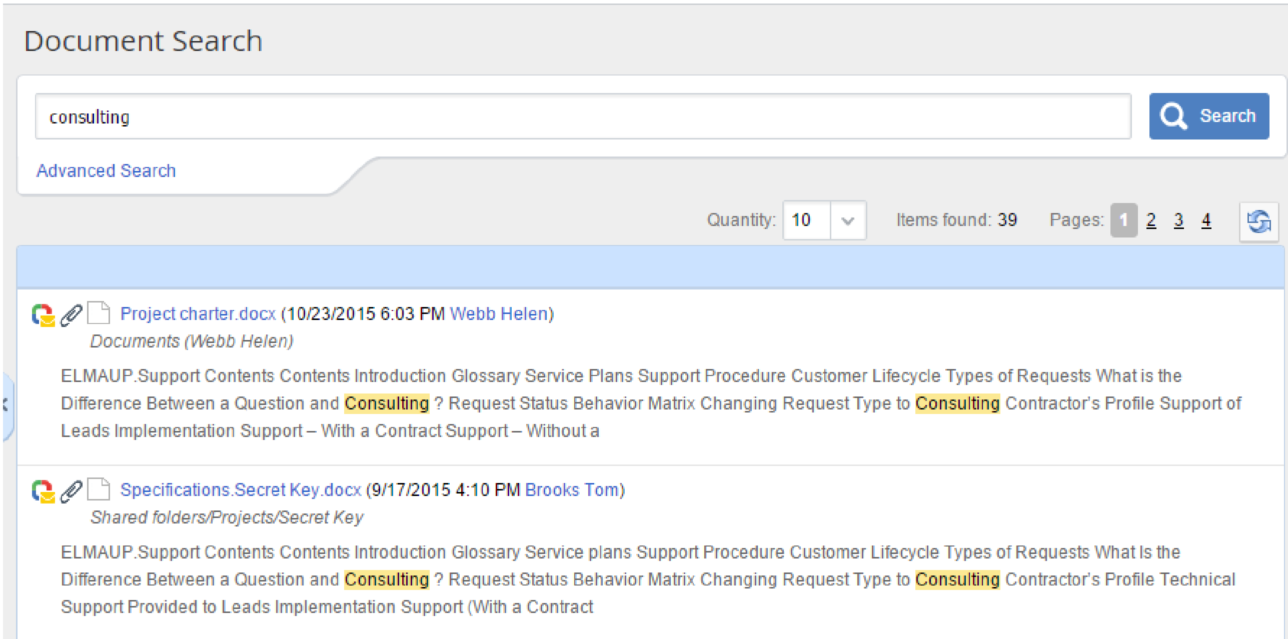


Fig. 207. Full text search results

The full text search is performed only by the parameter entered in the quick search field. If you specify any other properties, the search becomes advanced. To make full text search available in **ELMA** you need to configure additional settings. For detailed information see **ELMA Help**.

Chapter 9. Document Templates

It is often that a company uses the same documents over and over again, changing the names, dates and titles, but maintaining the overall document style.

In **ELMA ECM+** you can manage such documents by creating documents from a template. Users only need to fill in the form and specify the data that has to be added to the document. The system itself then creates a document file.

In **ELMA ECM+**, a document template is a file of a certain format (the supported formats are .rtf, .txt, .doc, .docx, .xls, .xlsx, .xml, .html). It has a static and a dynamic part. The static part always remains the same. The dynamic part contains names of variables instead of data; their values are formed from the properties of an electronic document or context variables of a process.

Here are some example of documents created form a template:

- Outgoing contracts. Contractor's data and your company's data is added automatically to the contracts, supplemental agreements and other companion documents;
- Employment agreements. Employee's data and your company's data is added automatically;
- Outgoing mail. Ensures corporate style for all outgoing e-mails and letters, adds address and contact person, prepares envelopes and so on.

To make a template available for creating a document you need to do the following:

- Create a document template in the required format.
- Add the template to the document type for which it was created.

Let's see how templates are used to create an outgoing letter.

9.1 Creating a Template

Create a template for outgoing mail. We reviewed the **Outgoing Mail** document type and its attributes earlier in section 7.2.

In a template, all the variables must look like this: {**$variable_name**}. The variable name is a unique name representing a document property and written in Latin.

For this template use the following properties: **Author**, **Recipient**, **Subject**, **and Text**. You can find the names of these properties in **ELMA Designer**, in the document type card, **Attributes** tab, **Property Name** column (Fig. 208).

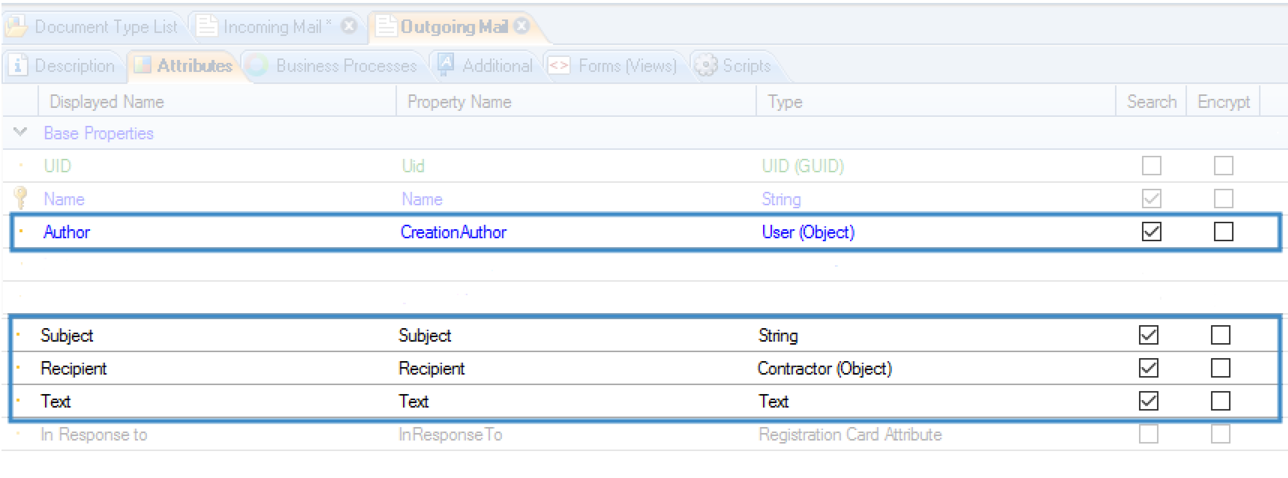
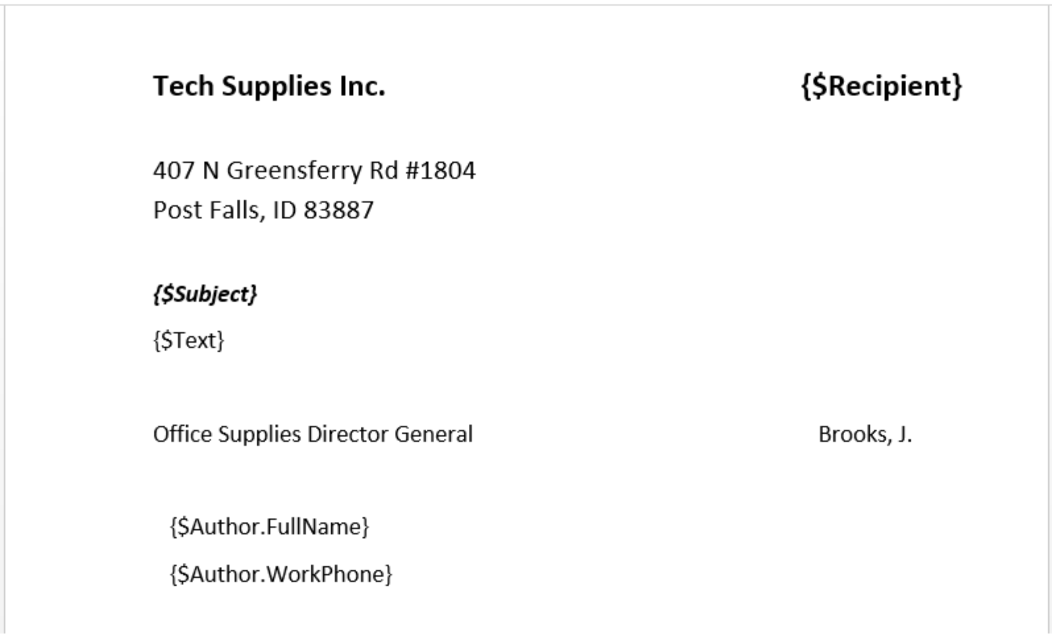


Fig. 208. Document prperties used in a template

Now create a document file of the .docx format and add the text and variables, as shown in Fig. 209.


Tech Supplies Inc. **{$Recipient}**

407 N Greensferry Rd #1804
Post Falls, ID 83887

{$Subject}

{$Text}

Office Supplies Director General Brooks, J.

{$Author.FullName}

{$Author.WorkPhone}

Fig. 209. Document template for Incoming mail

The Subject and Text properties (represented in the template as {**$Subject**} and {**$Text**}) are of String and Text types correspondingly. They are included in the template without additional properties. While **Author** and **Recipient** are objects of **User** and **Contractor** types, so the template includes their property values with string data type. You can find the names of an object's properties in the **Objects** section of **ELMA Designer**, in the object's **Properties** tab (Fig. 210).

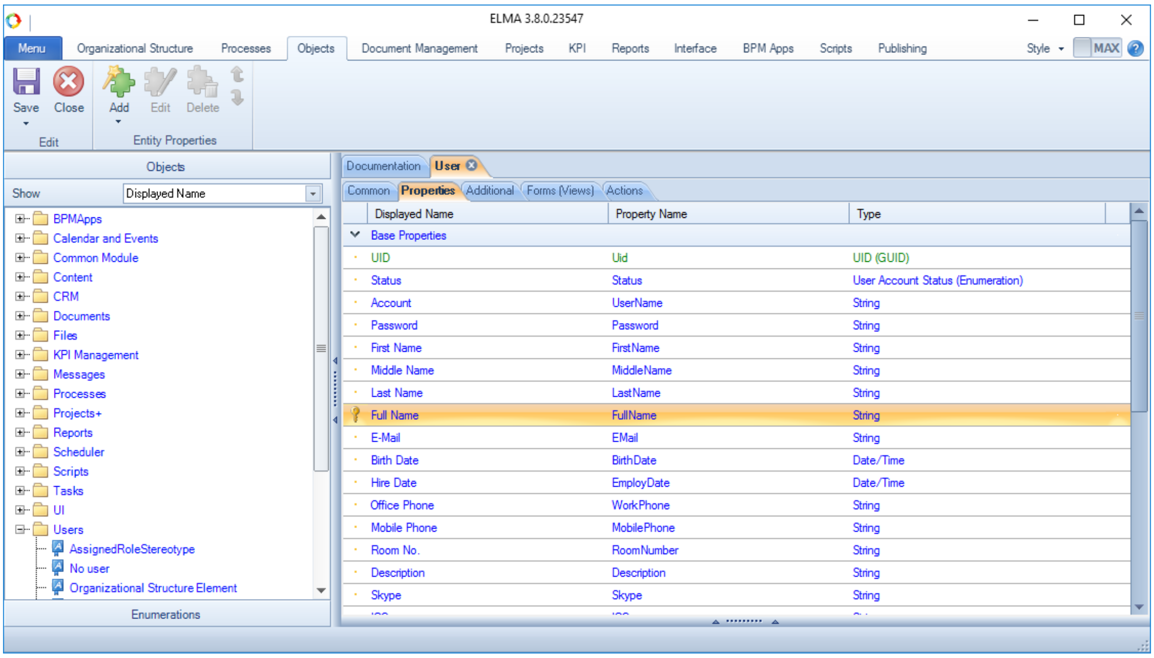


Fig. 210. User object, Properties tab

The layout of the {**$variable_name**} in the template is then applied to the text inserted instead of the code.

When the template is created, save it and bind to the document type.

9.2 Binding Template to Document Type

Templates are bound to document types in **Administration** → **Document Management** → **Document Types,** in the document type page, **Templates** tab. You can add templates from your local PC or use documents already included in **ELMA**.

Upload a file from your computer: click **Add Template from File**. In the window provided, select a file that contains the template (Fig. 211). After you click **Select**, the template is added to the list of available templates for the current document type. Click **Save**; now you can use the template to create documents.

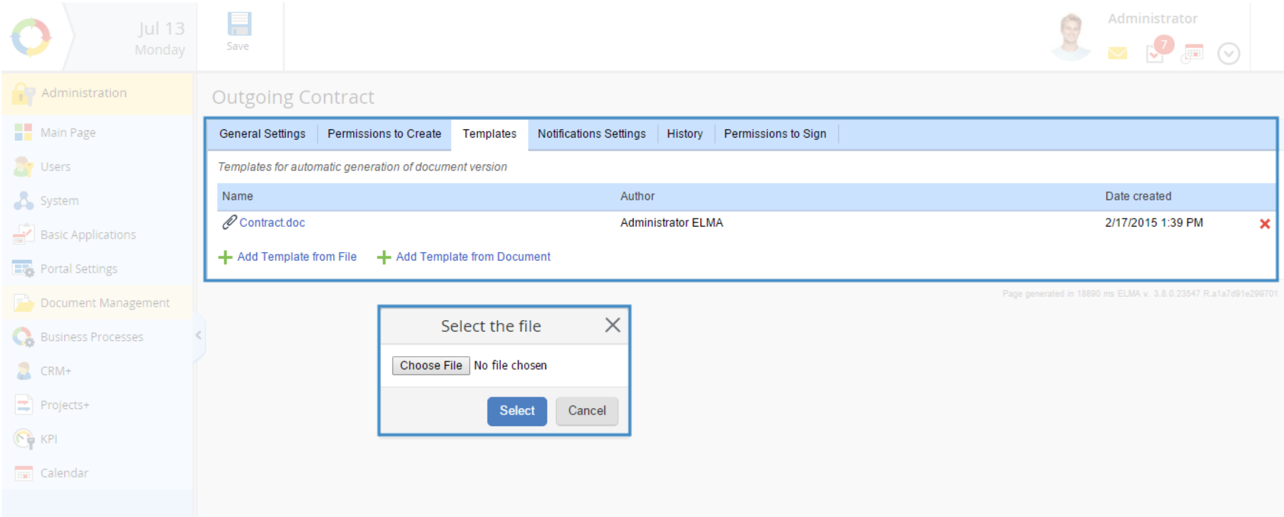


Fig. 211. Adding a template

One document type can have several templates, they are all available for usage.

9.3 Creating Document from Template

To create a document from a template in **Web Application** you need to fill in all the document properties and then select **Add Template** in the **Version** section (Fig. 212).

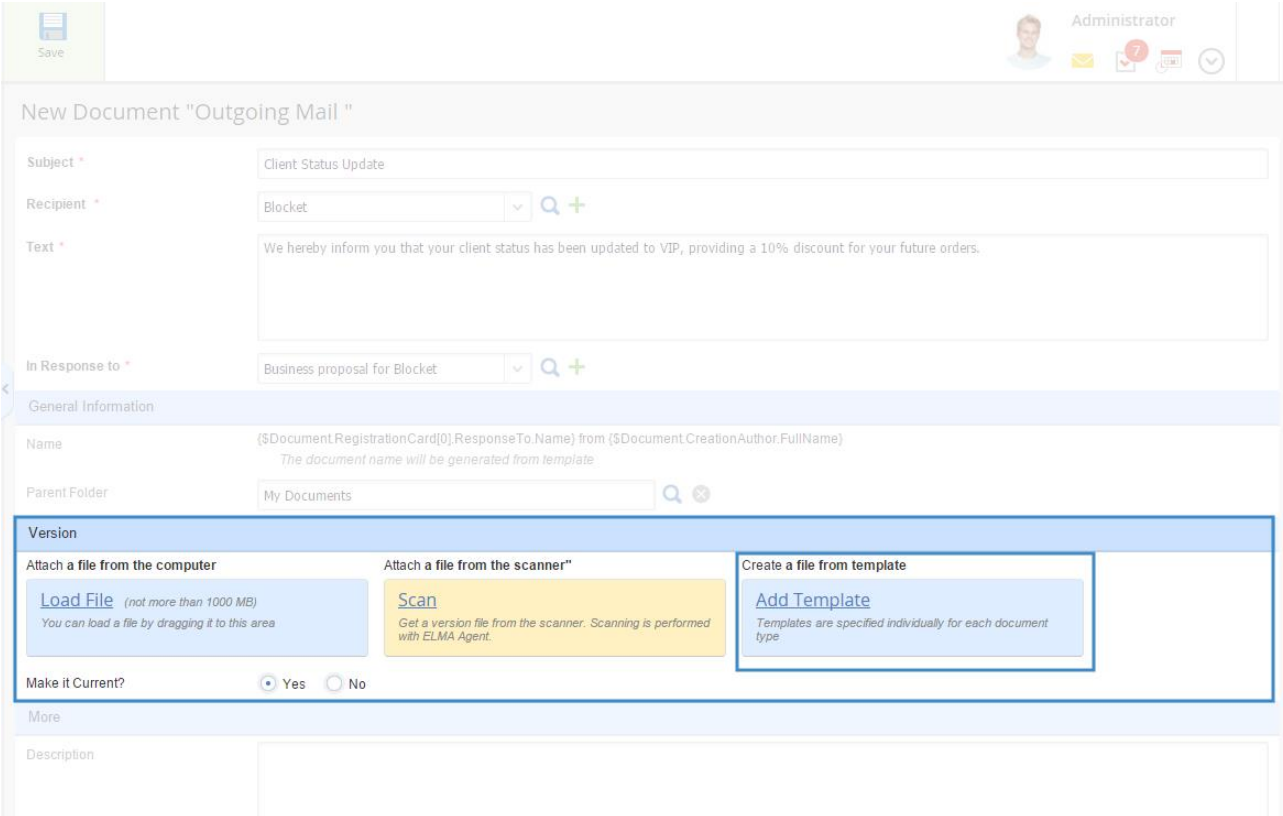


Fig. 212. Creating a version from a template

If there are several templates available, select one (Fig. 213). If there is only one template available, it is selected automatically.

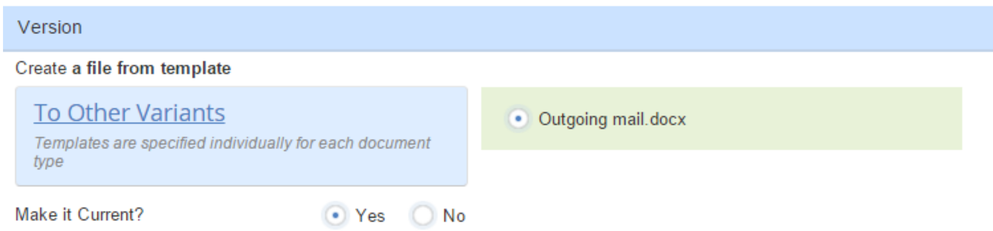
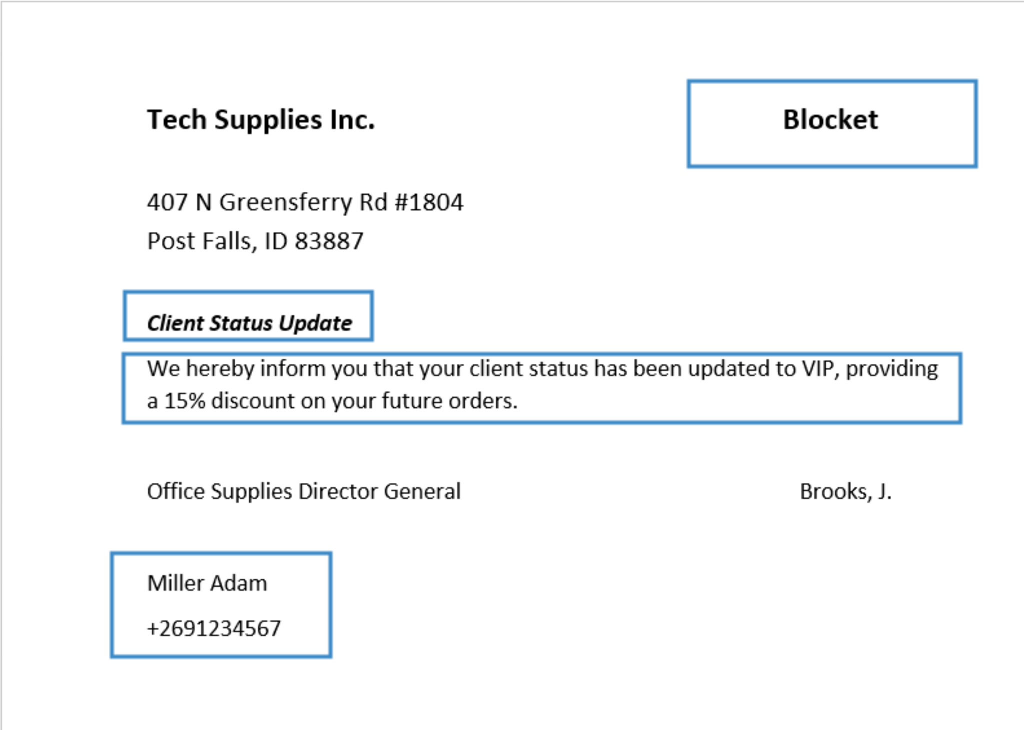


Fig. 213. Selecting document template

Save the document by clicking **Save** in the top menu. The document's version is then created from the template. Fig. 214 shows a document created from the template featured in Fig. 209. The text outlined in blue was generated from the document's properties.



Tech Supplies Inc.

Blocket

407 N Greensferry Rd #1804
Post Falls, ID 83887

Client Status Update

We hereby inform you that your client status has been updated to VIP, providing a 15% discount on your future orders.

Office Supplies Director General Brooks, J.

Miller Adam

+2691234567

Fig. 214. Document version created from the template

Chapter 10. Document Encrypting

In **ELMA** you can encrypt documents with a password to ensure data security and to limit access to the document.

For a user to be able to encrypt a document,

- System Administrator has to enable document encrypting in **ELMA Designer**;
- User needs **Full Access** permissions to the document.

Let's see how encrypting is done for the **Incoming Mail** document type.

10.1 Encrypting Settings

Enable encrypting for the **Incoming Mail** document type: tick the **Encrypting** checkbox in the additional tab in **ELMA Designer** (Fig. 215).

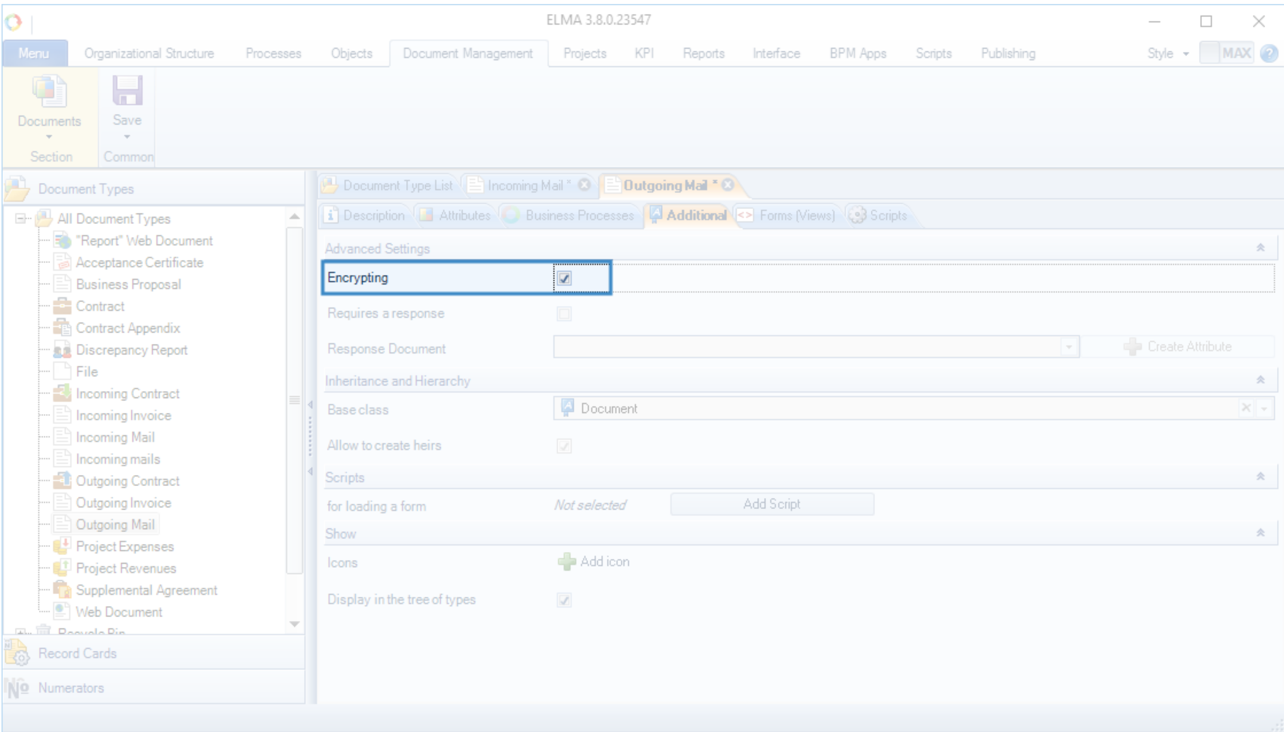


Fig. 215. Document type page, Encrypting option

The **Encrypt** column then appears in the **Attributes** tab of the document type page. Tick those attributes that need to be encrypted (Fig. 216). These attributes are then replaced with asterisks (****) in all the data tables in **ELMA Web Application**, or are not displayed at all. The encryption feature is available only for those properties that can be encrypted, such as: user attributes of simple types (except for the **Record Card**

Attribute), or attributes that feature other system objects as their type. Tick **Encrypt** for the **Versions** (Fig. 216) and **Sender** attributes.

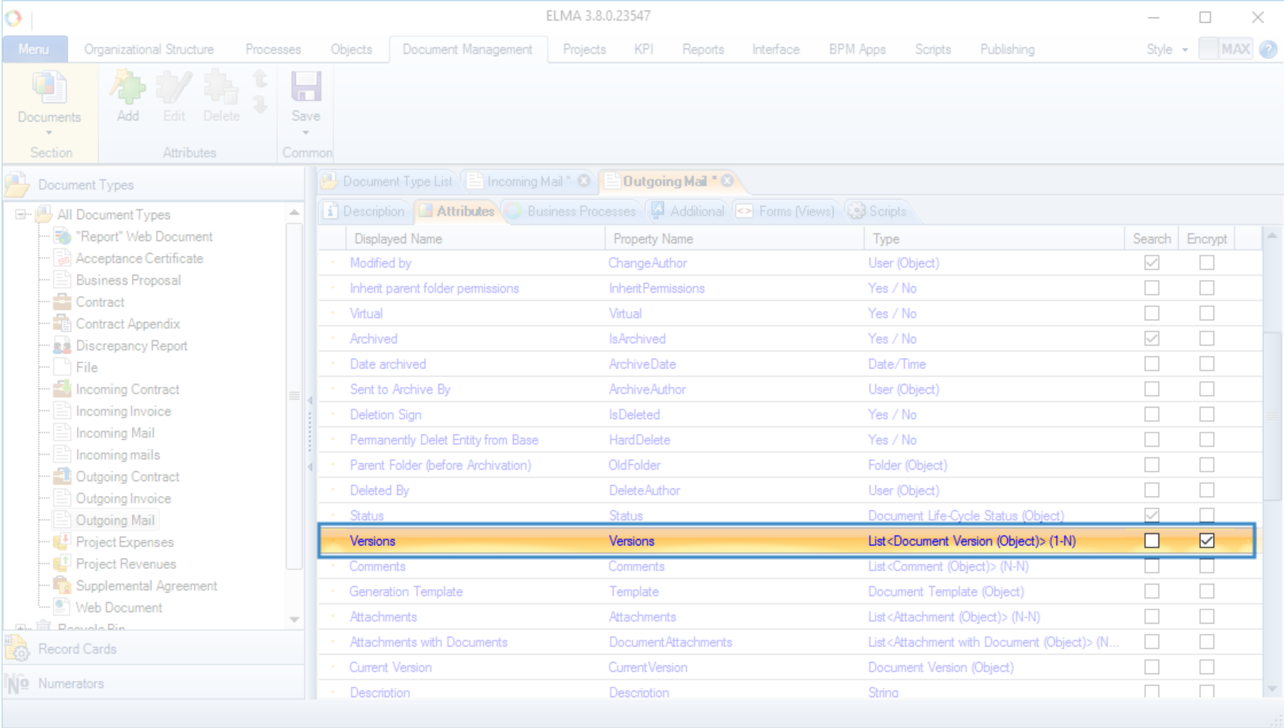


Fig. 216. Versions property. Encrypt option

Then publish the document type and restart **ELMA server**.

10.2 Using Encrypting

To encrypt a document in **Web Application**, go to the **Access** tab of the document page and click **Encrypt Secret Document** (Fig. 217).

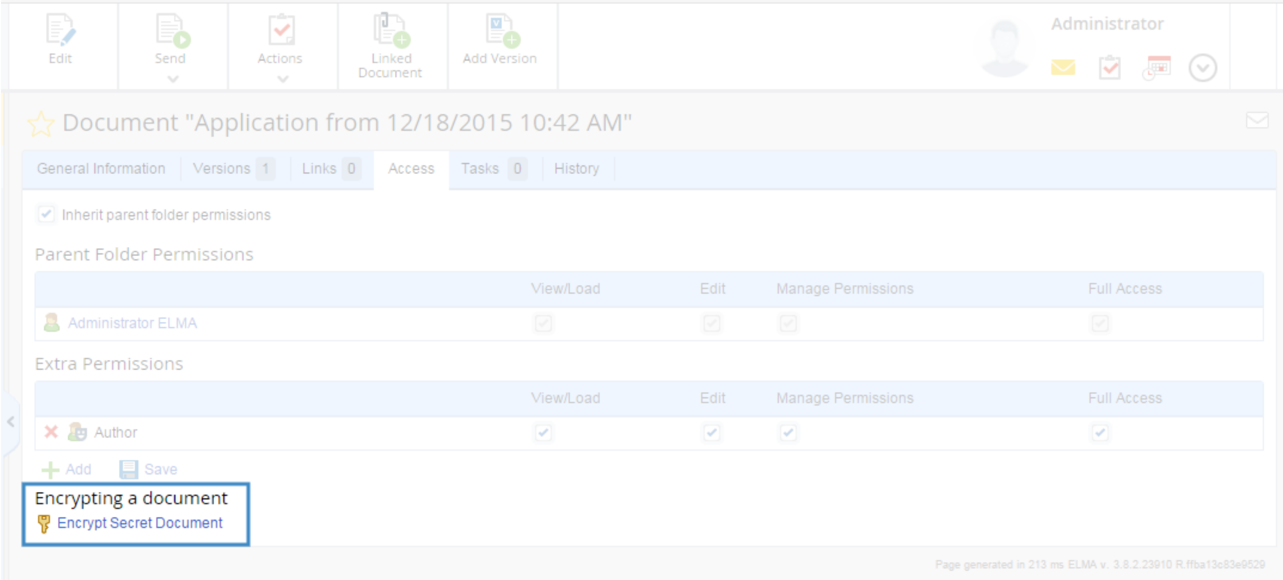


Fig. 217. Button for document encryption

In the window provided, enter and confirm the password and click **Encrypt** to encrypt or **Cancel** to cancel encrypting.

When encrypted, the document is marked correspondingly in its page's **Access** tab. It is possible to delete encrypting or to change the password (Fig. 218). For that, you will need to enter the current password.

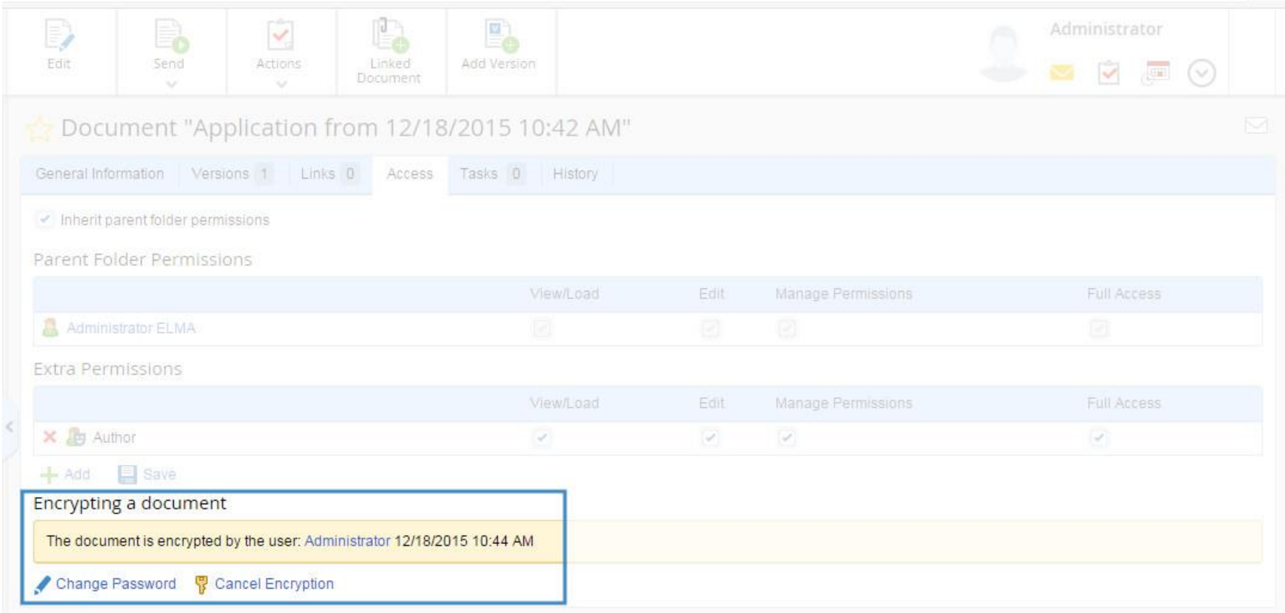


Fig. 218. Change Password or Cancel Encryption buttons.

The **General Information** tab of the encrypted document's page contains the **Confidential** section, which specifies the date and time of encrypting (Fig. 219).

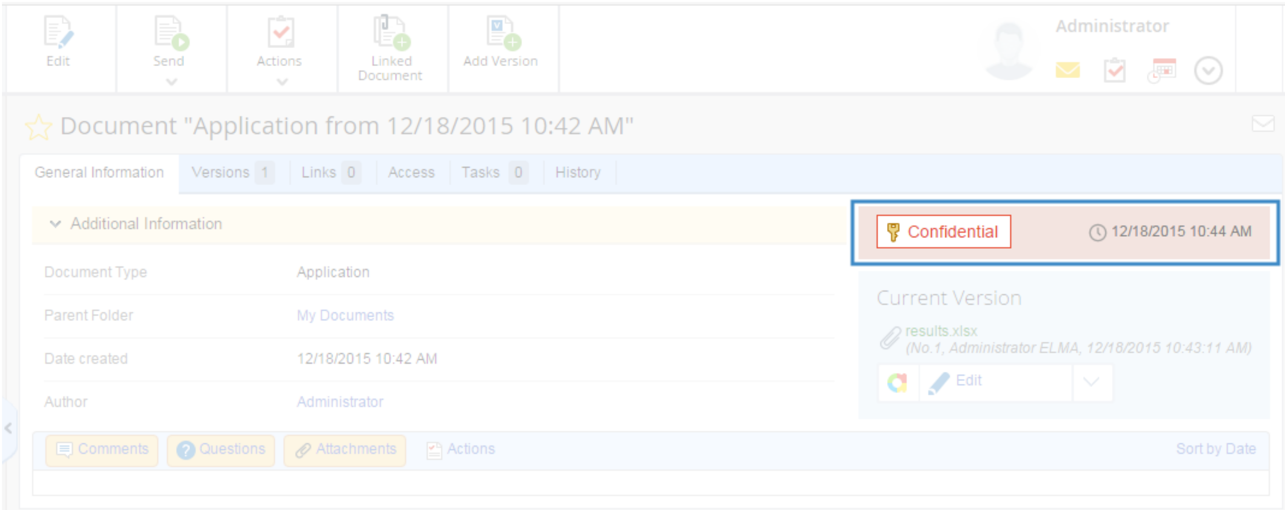


Fig. 219. Confidential section of the document page

The users who have access to the document are able to see it in the folders, but when they try to open the document page, **ELMA** asks them to enter a password (Fig. 220).

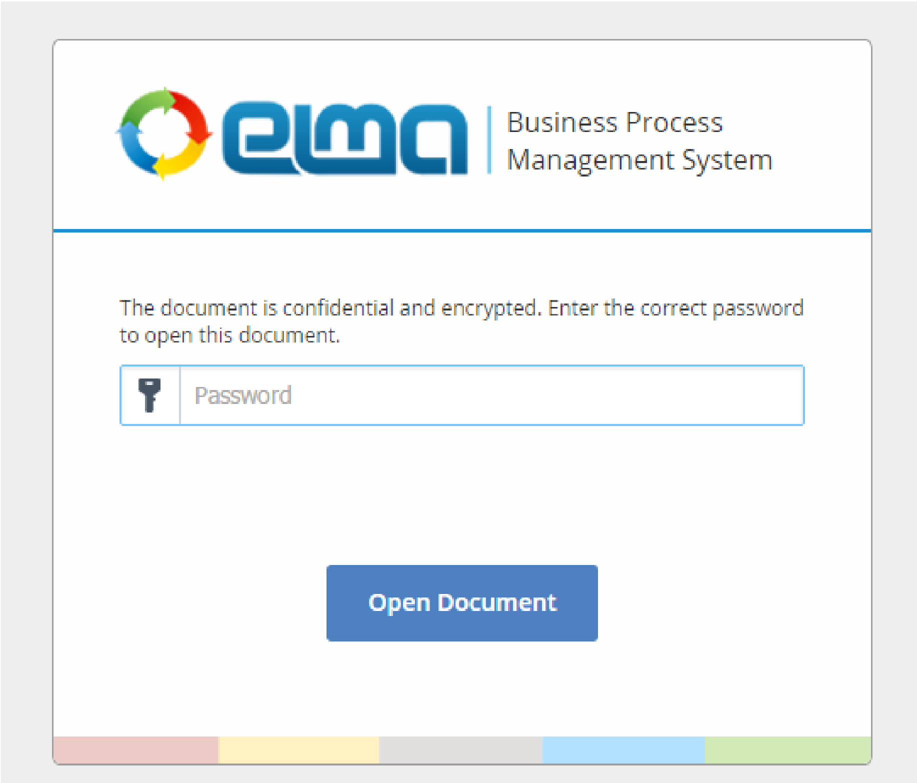


Fig. 220. Window asking to enter the correct password

Chapter 11. Document Barcoding

To use barcoding in **ELMA ECM+** you need to:

- Have an activated **Barcoding** application;
- Have **ELMA Agent** installed and configured;
- Set up barcode generation.

ELMA supports the EAN-13, PDF417 and QR-code barcode formats and their reading and printing devices.

A barcode is formed according to the registration number of a document when it is registered, and is displayed in the document page (**Barcode** property). The barcode image is stored in a .bmp file and can be downloaded to a local computer, printed out and attached to the document.

11.1 Barcoding Settings

The Barcoding application is set in **Administration** → **System** → **System Settings** → **Barcode Generation Settings**. Click to edit the settings. Set up the barcode generation as shown in Fig. 221.

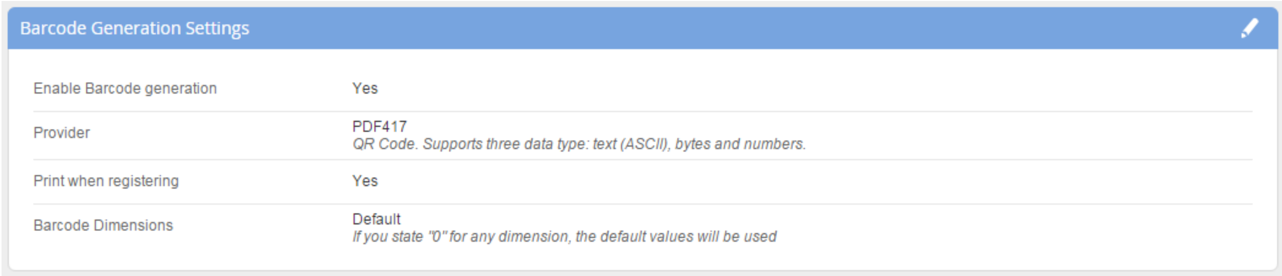


Fig. 221. Barcode generation settings

With these settings, **ELMA,** via **ELMA Agent,** will offer to print a barcode each time a document is registered (Fig. 222) (if the **Print when registering** option is set to **Yes**).

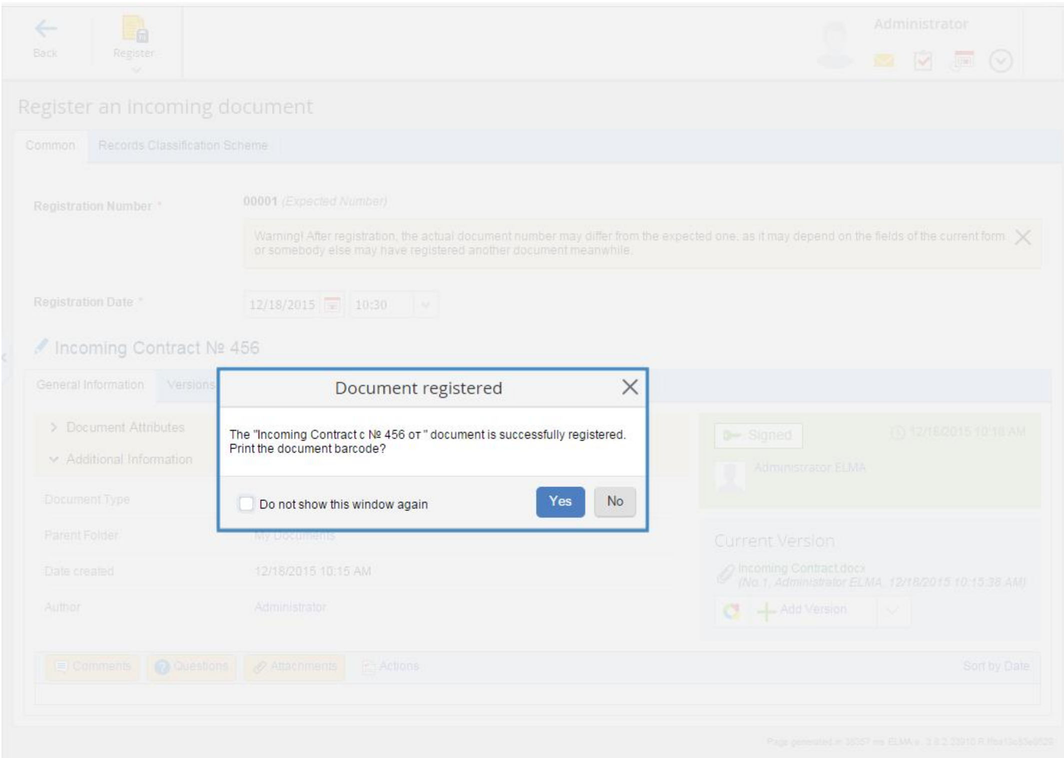


Fig. 222. Adding a barcode at document registration.

After registration, the barcode file (barcode property) is stored in the document page (Fig. 223).

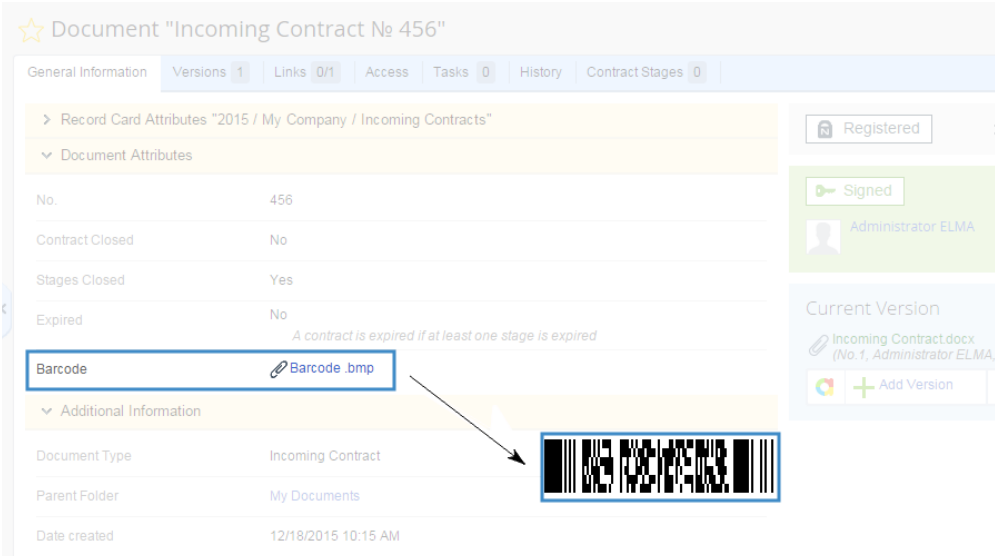


Fig. 223. Barcode property and barcode image.

When creating a document from a template, you can add a barcode to the document page using the **BarcodeFile** variable, which contains the generated barcode (Fig. 224).

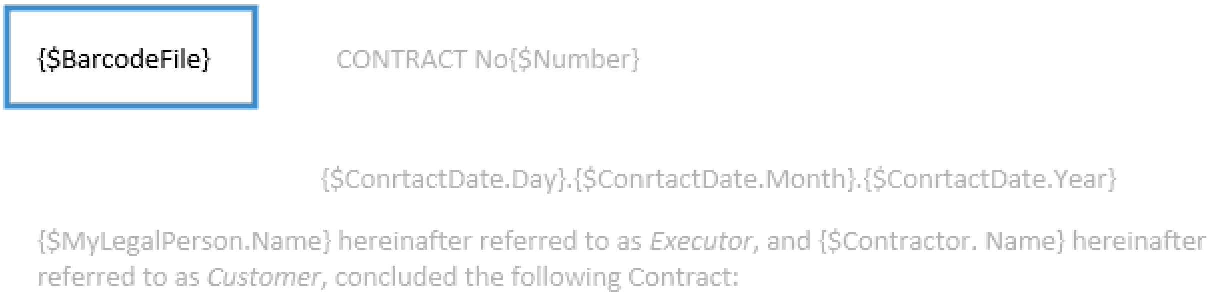


Fig. 224. Document template. «BarcodeFile» variable.

11.2 Search by Barcode

In **ELMA** you can search documents by their barcode. This tool can be added to the Documents section menu or to the main page portlet of those users who need this function for their work.

Let's see how a portlet is configured. Add an **HTML** portlet from the portlet catalog to the main page (for more details on managing portlets see **ELMA Help**). Click **ELMA** in the portlet settings and select **Add Action** (Fig. 225).

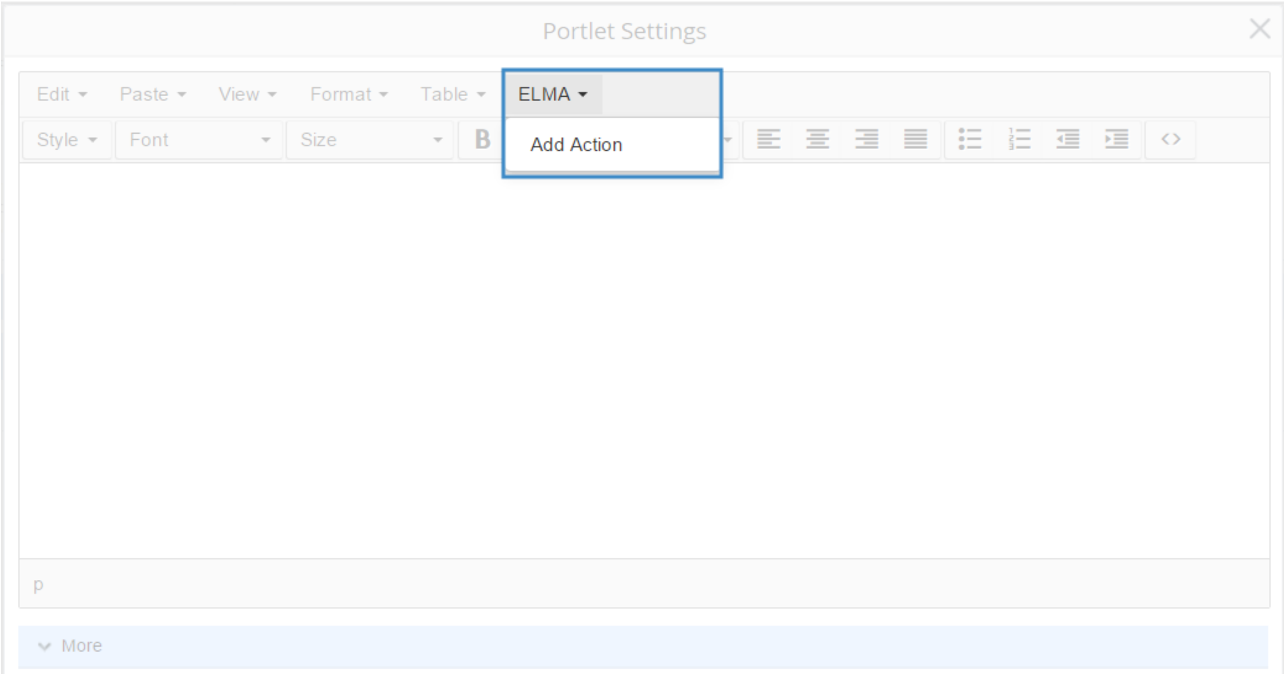


Fig. 225. HTM portlet settings. Adding an action

In the provided **Select Action** window, click **More** to open the full list of actions. Then select **Search by Barcode** in the **Barcode Generation** section (Fig. 226), then click **Next**.

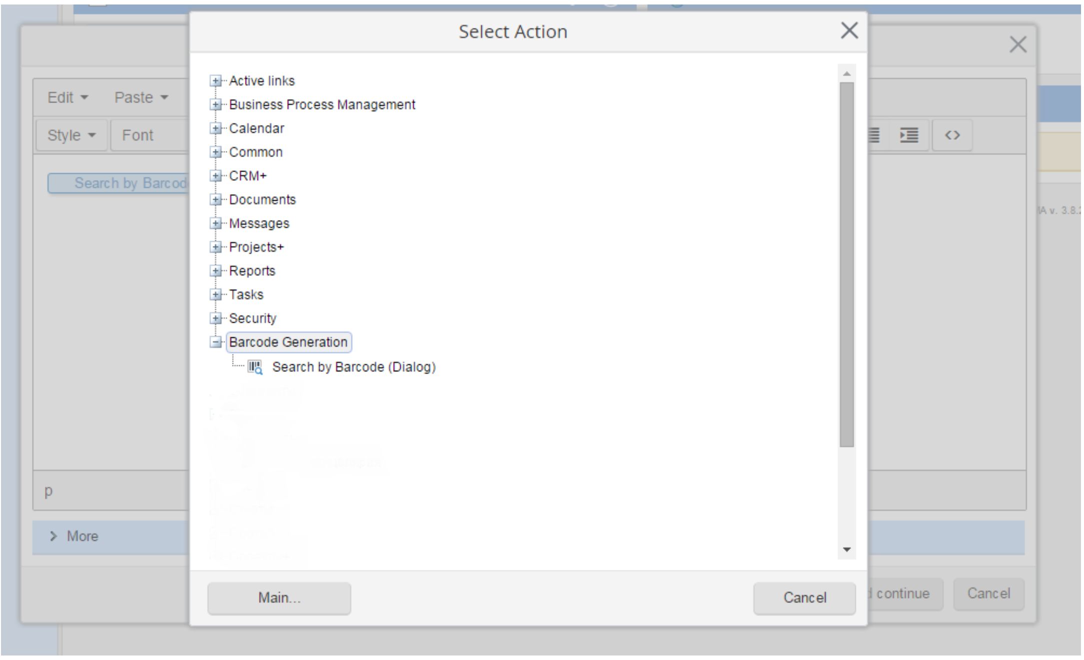


Fig. 226. Select Action window

The next step is to decide how you want the *Search by Barcode* link to be displayed. By default it's a link, but you can make it a button (Fig. 227). To save the settings, click **Done**.

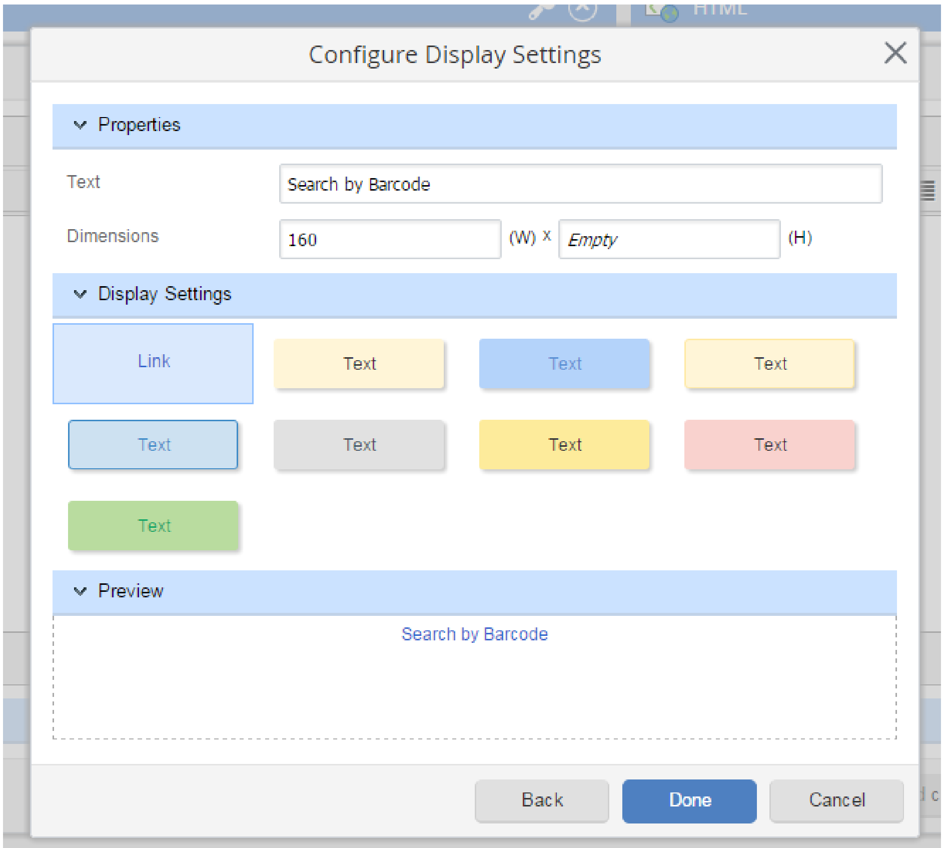


Fig. 227. Display settings.

After the settings are adjusted, the portlet appears on the main page, featuring a button that opens a window to scan a barcode and perform search.

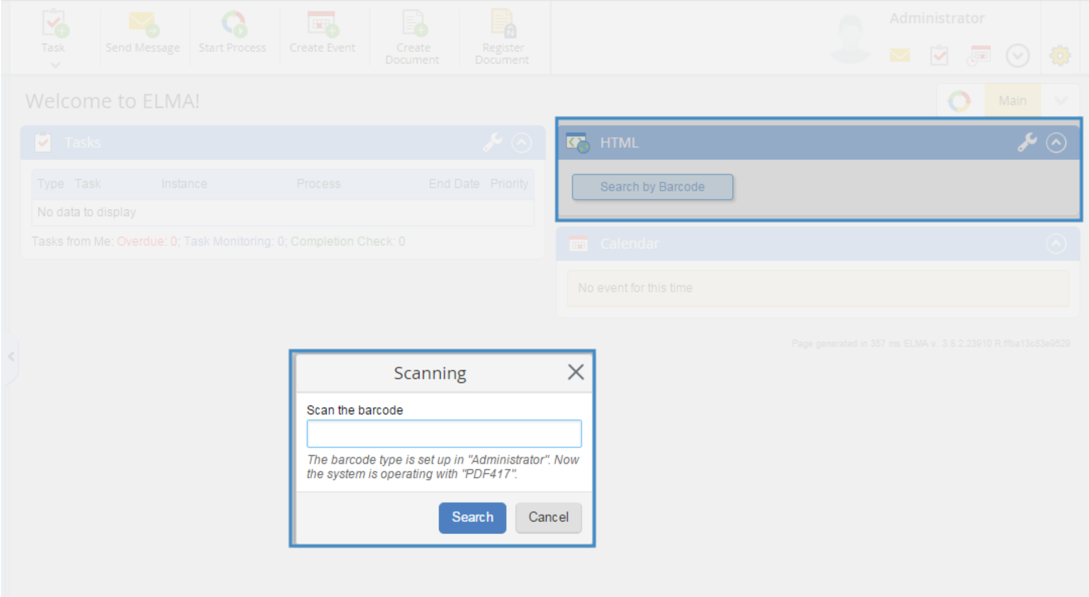


Fig. 228. Search by Barcode portlet. Barcode scanning window

Chapter 12. Digital Signature

A **Digital Signature** is a document property that contains information encrypted by means of public-key cryptography. It authenticates the signer and verifies that the message has not been altered since the moment it was signed.

A digital signature, authenticating the signer, can be used instead of a handwritten signature in cases recognized by law.

Certain conditions are required for the digital signature to be used in **ELMA**:

- A web-browser that supports using a digital signature in **ELMA**;
- CAPICOM plugin installed in the browser;
- **ELMA ECM+** application activated;
- User certificates and a certification center available;
- Signature templates must be filled in and saved in **Administration** → **Document Management** → **Digital Signature Templates**;
- User must have signing privileges.

12.1 Digital Signature Settings

The following settings are required for the digital signature to be available in **ELMA**:

- Digital Signature Settings;
- Digital Signature Templates settings;
- Access settings for signing documents;
- Security settings.

The **Digital Signature Settings** are managed in **ELMA Web Application**, in **Administration → System → System Settings, Digital Signature Settings** section (Fig. 229).

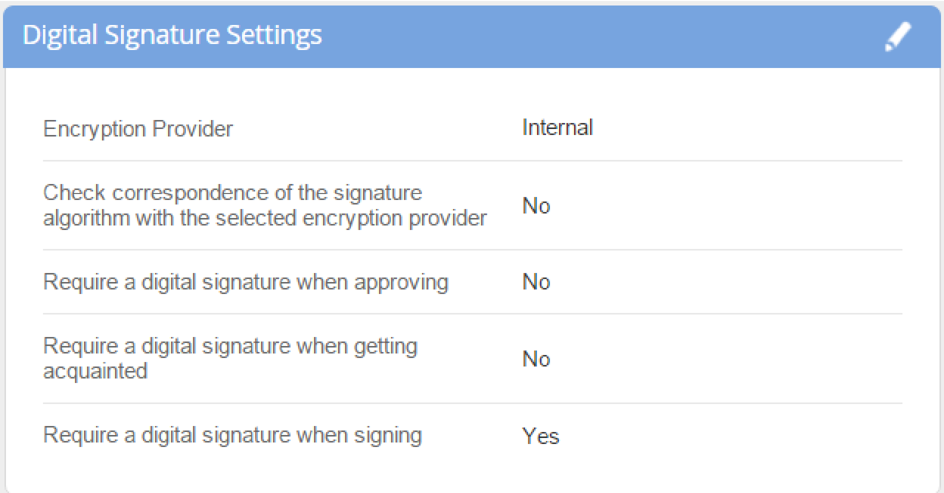


Fig. 229. Administration → System → System Settings, Digital Signature Settings section

To edit, click . Make all the necessary modifications in the provided window and click **Save**.

Encryption Provider. Here you have to select an encryption provider, internal or other, form the drop-down list. This encryption provider will then allow users to sign document versions (for each country encryption providers might be different). Before selecting the internal encryption provider, you need to set up a certification center and receive user certificates. These settings are thoroughly described in **ELMA Help**.

Check correspondence of the signature algorithm to the selected encryption provider:

- **Yes** – Recognizes the certificate generation algorithm, compares the selected encryption provider to the provider of the current certificate.
- **No** – Does not verify the certificate generation algorithm, does not compare the selected encryption provider to the provider of the current certificate.

Require a Digital Signature when approving/getting acquainted/signing: If you select **Yes**, all these operations will require a digital signature to be used.

In **ELMA**, **Digital Signature** templates are managed in **Web Application**: **Administration** → **Document Management** → **Digital Signature Templates** (Fig. 230).

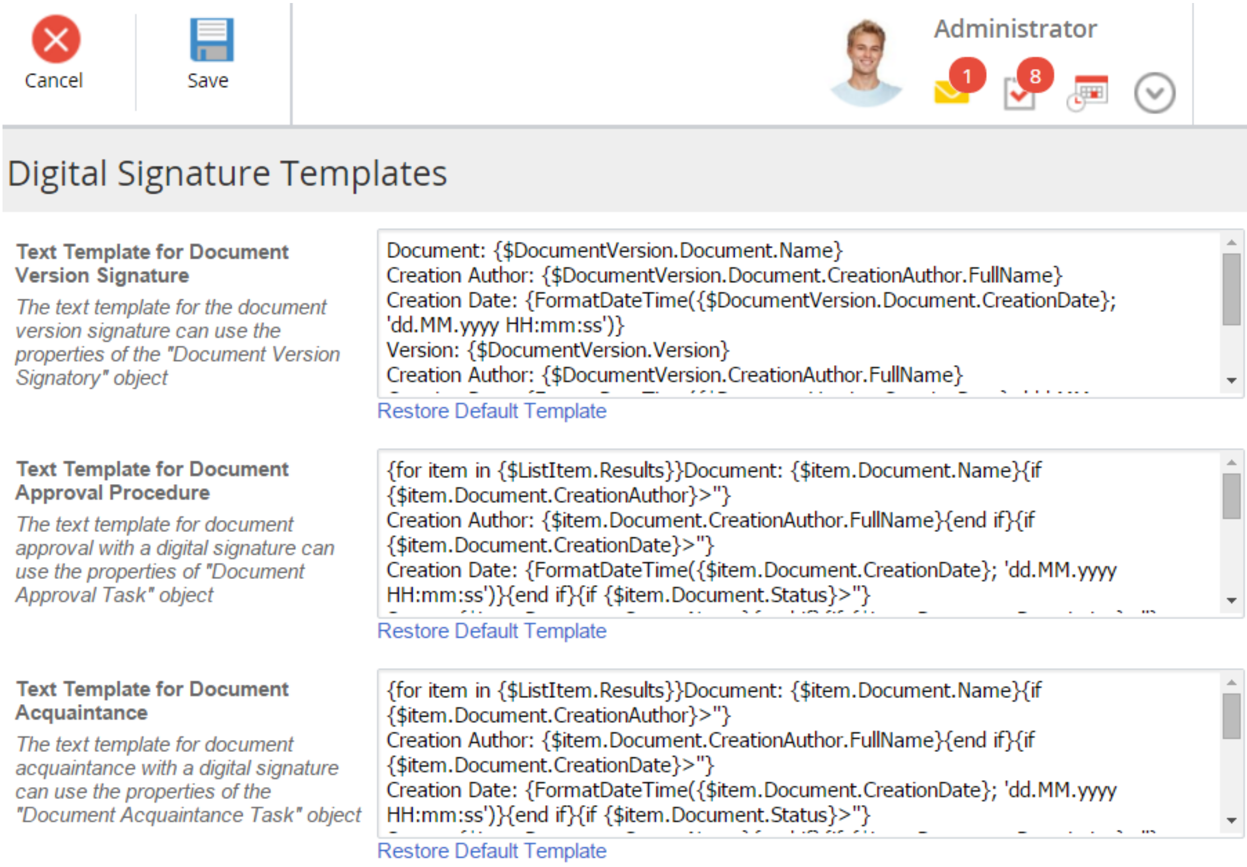


Fig. 230. Web Application: Administration → Document Management → Digital Signature Templates

In this section you can configure the text that is formed automatically when a document version is signed, approved or acquainted with (if a digital signature is required for these operations). Text templates can contain both simple text and properties (property names) of required objects.

Signature privileges are managed in **Administration** → **Document Management** → **Document Types** for each document type (previously described in section 3.4.3).

Security settings are managed in **Administration** → **System** → **System Settings** → **User Management Settings** (Fig. 231).

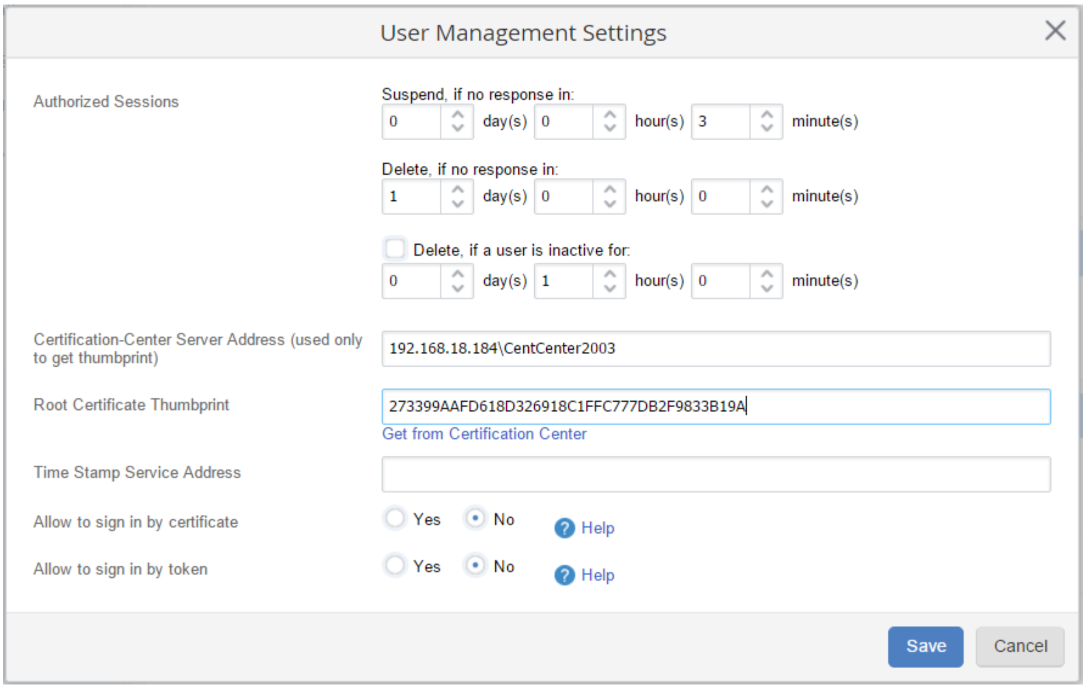


Fig. 231. User Management Settings

The certification center issues and verifies a public key certificate that the user has to enter in order to sign, get acquainted with, or approve a documents. A public key certificate can also be used to login in **ELMA**.

In this section you need to specify the **Certification-Center Server Address**, **Time Stamp Service Address,** and **Root Certificate Thumbprint**. Fig. 231 features an example of the certification center address.

If certificates are installed correctly on the users' computers, they can use the **Digital Signature** to sign and approve document versions and to get acquainted with them.

12.2 Signing Documents with Digital Signature

If the **Require a Digital Signature when signing** option (Fig. 229) is set to **Yes**, it will be possible to sign a document version with a digital signature only. In other cases, a digital signature is not compulsory for signing a document.

To sign a document version, go to the **Actions** button of the document page and select **Sign Document**. Then select the **Sign Attributes with Digital Signature** and/or **Sign Content with Digital Signature** checkboxes in the **Sign Document Version** window (Fig. 232). If using a digital signature is compulsory, these checkboxes are selected automatically and cannot be deselected.

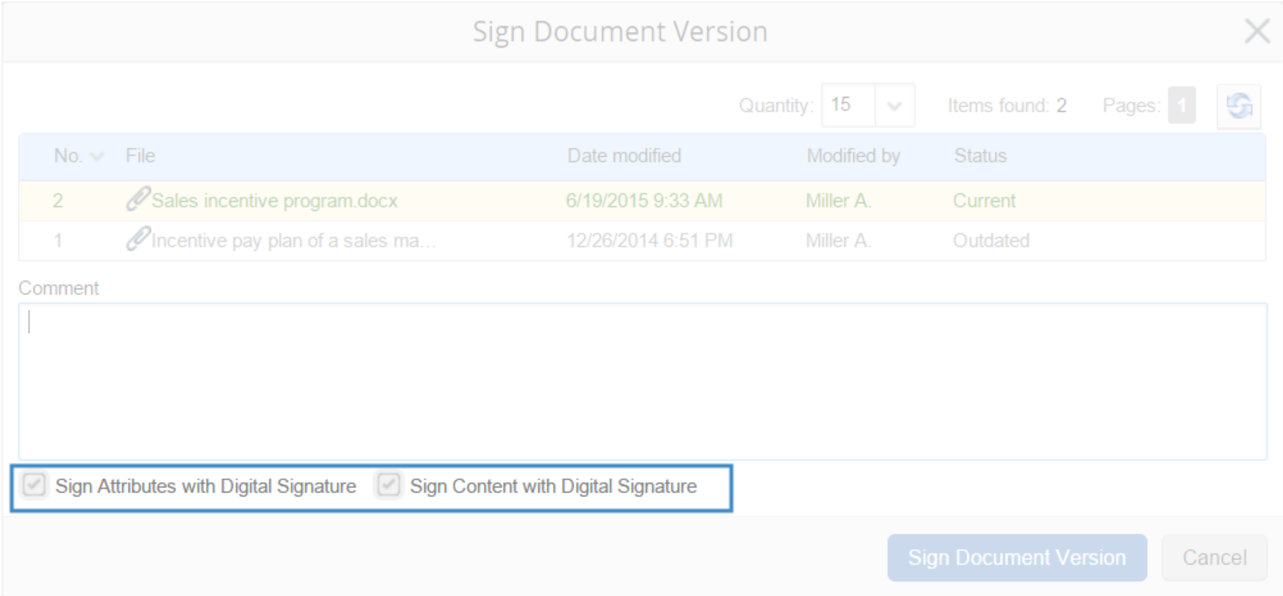


Fig. 232. Options for signing with a digital signature.

Sign Attributes with Digital Signature – This option is always available if the **ECM+** application is activated. It ensures that only document properties are signed with the digital signature (this option is valid only within **ELMA**).

Sign Content with Digital Signature – This option is displayed only if the **External** encryption provider is selected, and if the **ECM+** application is activated. This option ensures that the current version of the document is signed. The signed version can be then downloaded to a local computer.

When both of these options are selected, both the document version and its properties are signed.

After you click **Sign Document Version**, the **Digital Signature Creation** dialogue box opens (Fig. 233).

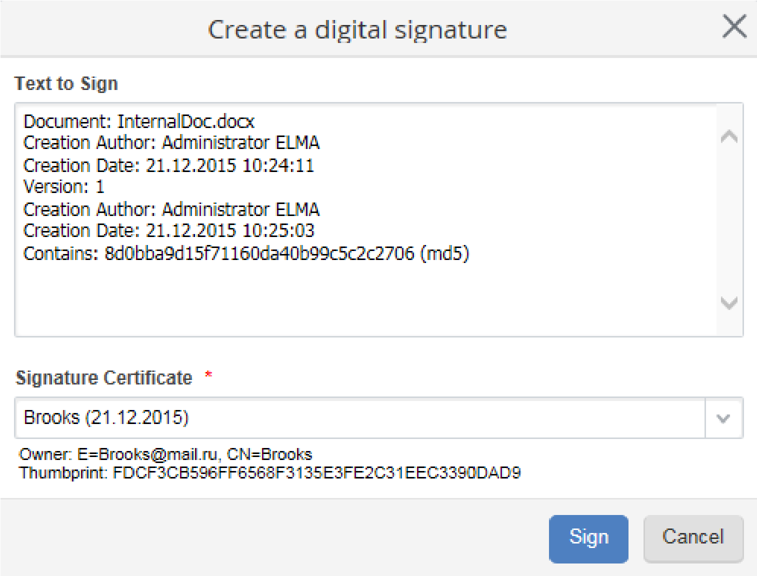


Fig. 233. Creating a digital signature

In this box, select a certificate in the **Signature Certificate** field. Once it is selected, the **Text to Sign** field will show information about the selected certificate, in the format specified in template settings.

To sign the document version, click **Sign**.

The selected document version is then signed with a digital signature and marked accordingly, as shown in (Fig. 234).

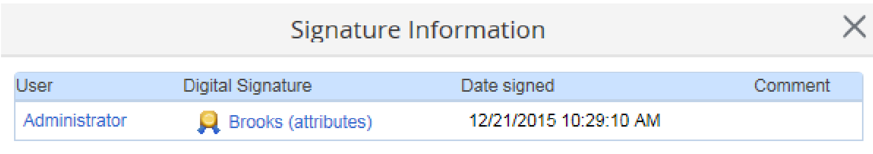


Fig. 234. Information about the Digital Signature.

When you click on the user's name in the **Digital Signature** column, a dialogue box opens (Fig. 235), providing information about the selected signature. It also allows you to download the text and the signature itself to your hard drive.

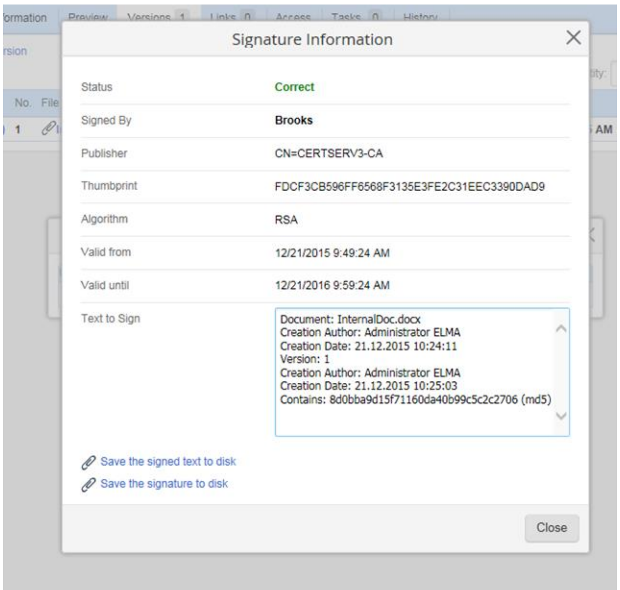


Fig. 235. Information about the digital signature.

12.3 Approving Documents with Digital Signature

A digital signature can be used for document approval. If the **Require a Digital Signature when approving** option is set to **Yes** in the Digital Signature settings (Fig. 229) then it is only possible to approve a document version by using a digital signature.

To approve a document version with a digital signature (Fig. 161) click **Approve** or **Reject**. Then, in the **Add Comment** window select the **Sign attributes with digital signature** and/or **Sign content with digital signature** checkboxes (Fig. 236). These options become available when an external encryption provider is selected in the **Digital Signature Settings** (Fig. 229). If an internal encryption provider is selected, only the **Sign Attributes with Digital Signature** option is available. If the provider is not selected, this function is not available.

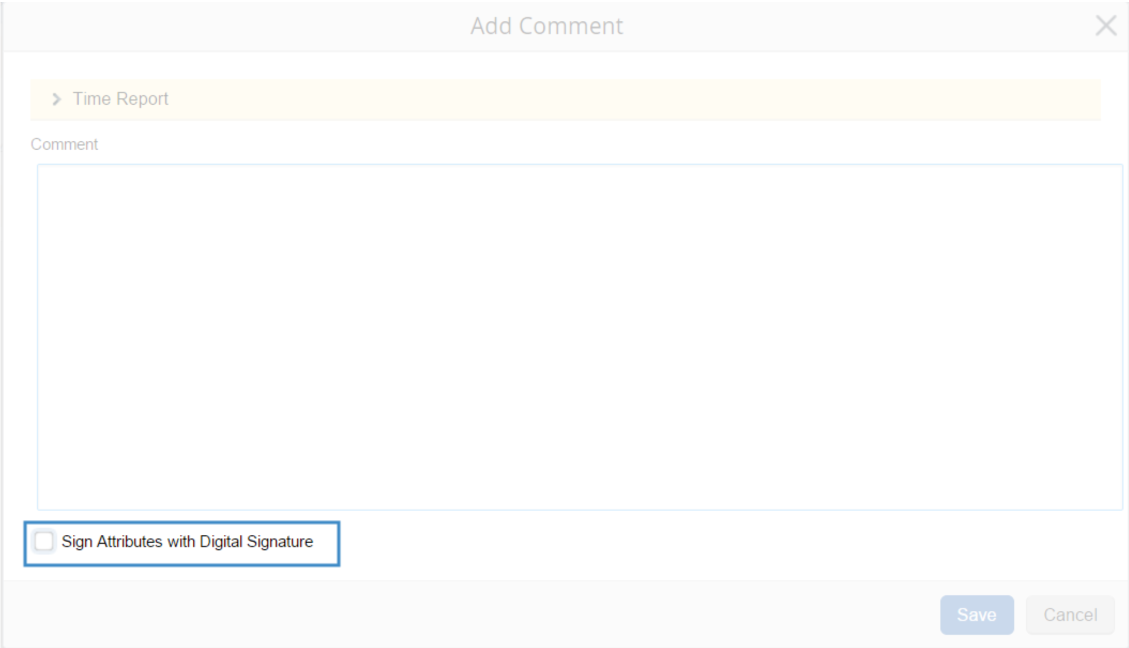


Fig. 236. "Sign Attributes with Digital Ssignature" option

When you confirm the operation, the **Digital Signature Creation** dialogue box appears (Fig. 233), just like for signing a document. To save approval results click **Sign**.

A document, approved or rejected with a digital signature, features a corresponding notification in the **General Information** tab (Fig. 237). This information is also displayed in the **Approval** tab.

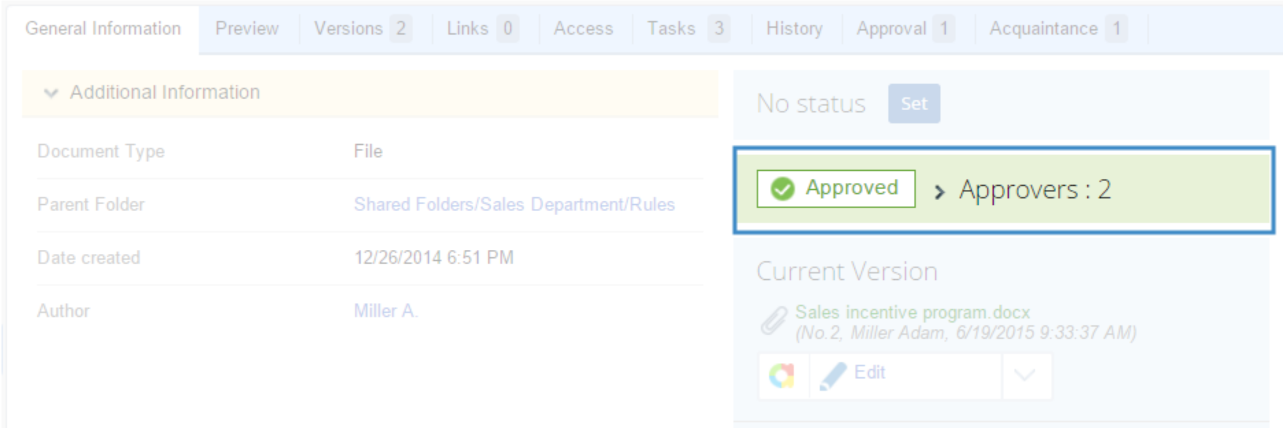


Fig. 237. Document page. General Information tab. Document status

Chapter 13. ELMA BPM Mobile Apps

Users can work in **ELMA** not only from their PC or laptop, but also from a mobile phone or tablet while not in the office. **ELMA** has developed specially-designed mobile applications that allow you to start and execute routing processes, assign and monitor document-related tasks, communicate and post in the **Messages** section.

Mobile apps are available for iPhone, iPad and Android devices. For the **ELMA BPM** mobile app to function with Android, you need a 4.0 version or higher. In case of iOS, a 6.0 version or higher is required.

Mobile apps are available on **Google Play** and **App Store**. The **Mobile Apps** section of **ELMA Store** (https://store.elma-bpm.com) features directs links to these applications.

Mobile apps require separate licensing. One mobile license provides access from all the mobile apps. To access **ELMA** from a mobile device, a user has to be added to the **BPM Mobile app users** group in **Administration** → **Users** → **Groups**.

13.1 Installing Application

To install the **ELMA BPM mobile app**, go to **Google Play** or **App Store** and search by **"ELMA"**. Then open the application's description page and click **"Install"** in **Google Play** or **"Download"** in **App Store**. Once downloaded, the application will be automatically installed on your device.

When the application is installed, the **ELMA BPM** icon appears on the home screen, allowing for quick-start of the application.

When the application is launched, the start window appears (Fig. 238, Fig. 239). Fill in all the required fields and authorize in the system:

- **Server Address** – Enter the address of the **ELMA** server through which you want to connect to the system. The address is written in the following way: **http://<computer name><domain>:<port>**,
- **Login**, **Password** – Enter your **ELMA** login and password

Then click **Enter**.

Fig. 238. ELMA BPM start window for Android.

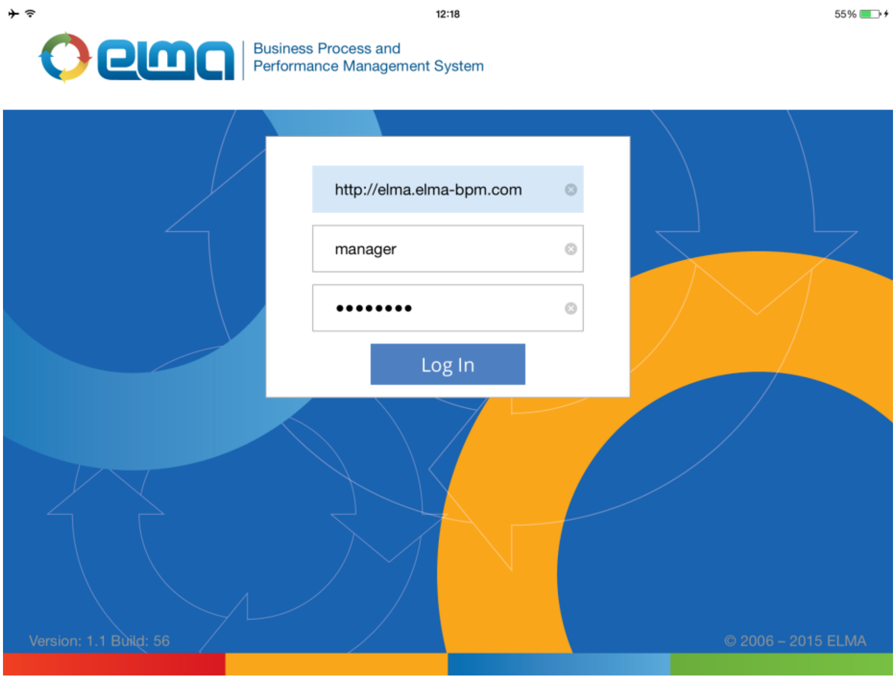


Fig. 239. ELMA BPM start window for iOS.

When you first enter the system, a dialogue window appears showing a notification about initial data upload. Click the **OK** button.

When the data is uploaded, the main application page opens (Fig. 240, Fig. 241). Your application is now ready for work.

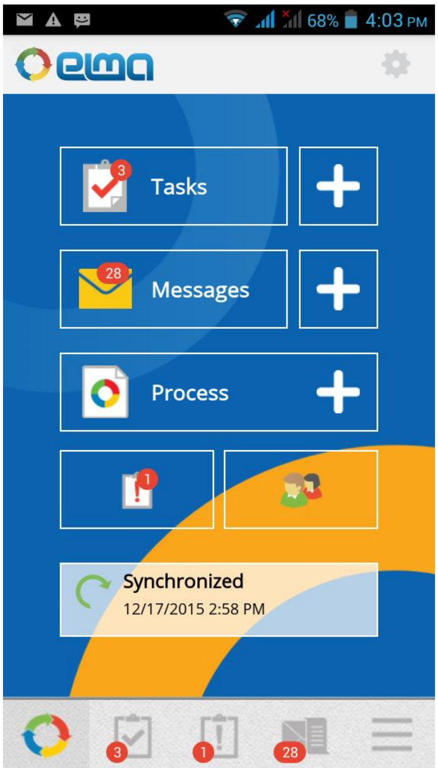
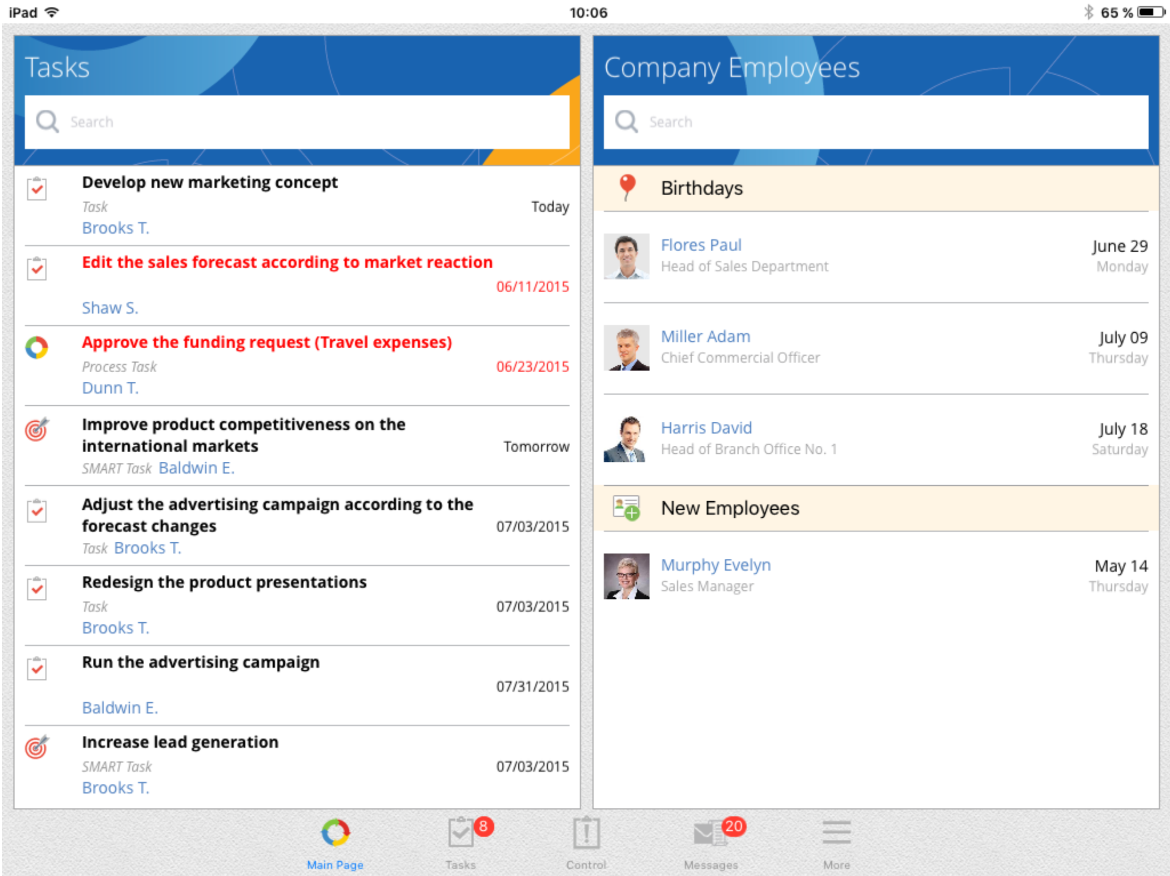


Fig. 240. ELMA BPM mobile app for Android. Main page.



For. 241. ELMA BPM mobile app for iOS. Main page.

On **ELMA** demo stand you can try out the mobile app functions without having to activate a license. To go to the demo stand, follow this link http://demo.elma-bpm.com

13.2 Basic Functions of Mobile Apps

With basic functions of **ELMA** mobile apps you can:

- Start business processes (Fig. 242);
- Create, view and monitor user tasks, document-related tasks and business process-related tasks;
- Create messages and add comments in the Messages section.

All the processes and routes available in **ELMA Web Application** are accessible from the mobile app (Fig. 242). The Process Map shows the current stage of a business process.

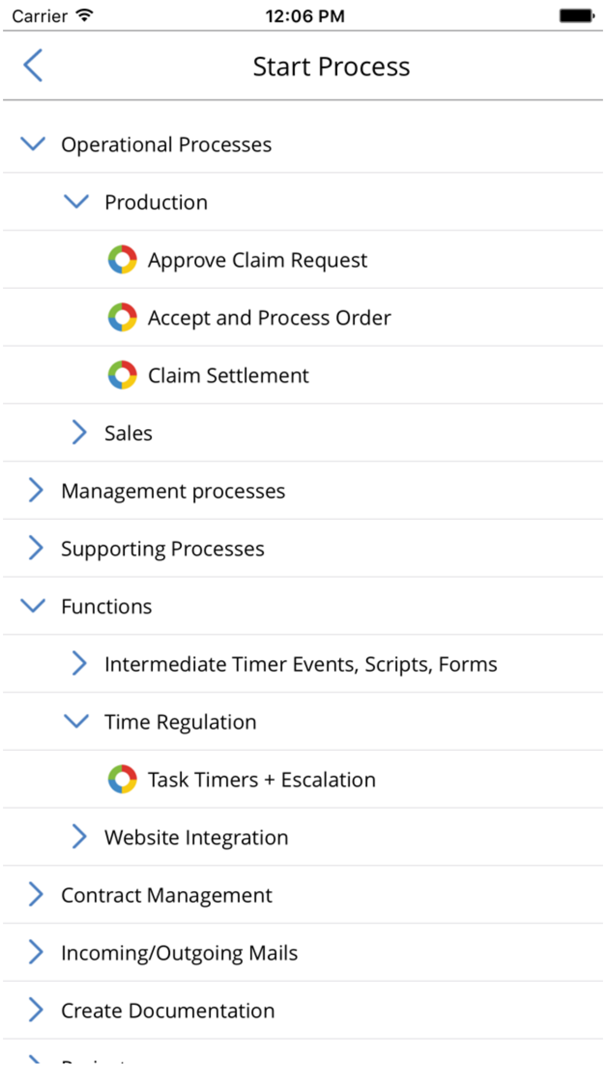


Fig. 242. Start Process window (iOS)

In **ELMA BPM mobile apps**, the task page contains all the information about the task. The necessary document can be attached to the task. It is also possible to add a comment, reassign the task and monitor its execution.

ELMA BPM mobile apps support acquaintance, approval and decision-making tasks (Fig. 243). When making a document-based decision, you can assign follow-up tasks to other employees. The application also allows you to find a required document in no time at all.

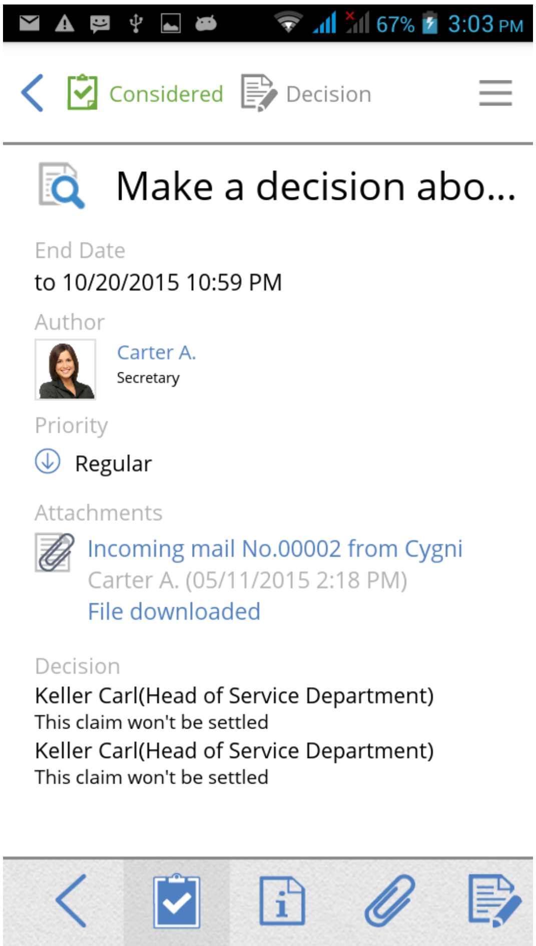


Fig. 243. Consideration task (Android)

When a task is opened in the mobile app for iPad, the left side of the screen shows the form as displayed in **Web Application**. The right side is an info unit that displays additional properties: process name, instance name and process map.

Messages is a tool for communication within the company. It shows all the notifications, incoming tasks, messages from other users and so on. With the mobile app you can track all the events, and create messages and comments (Fig. 244).

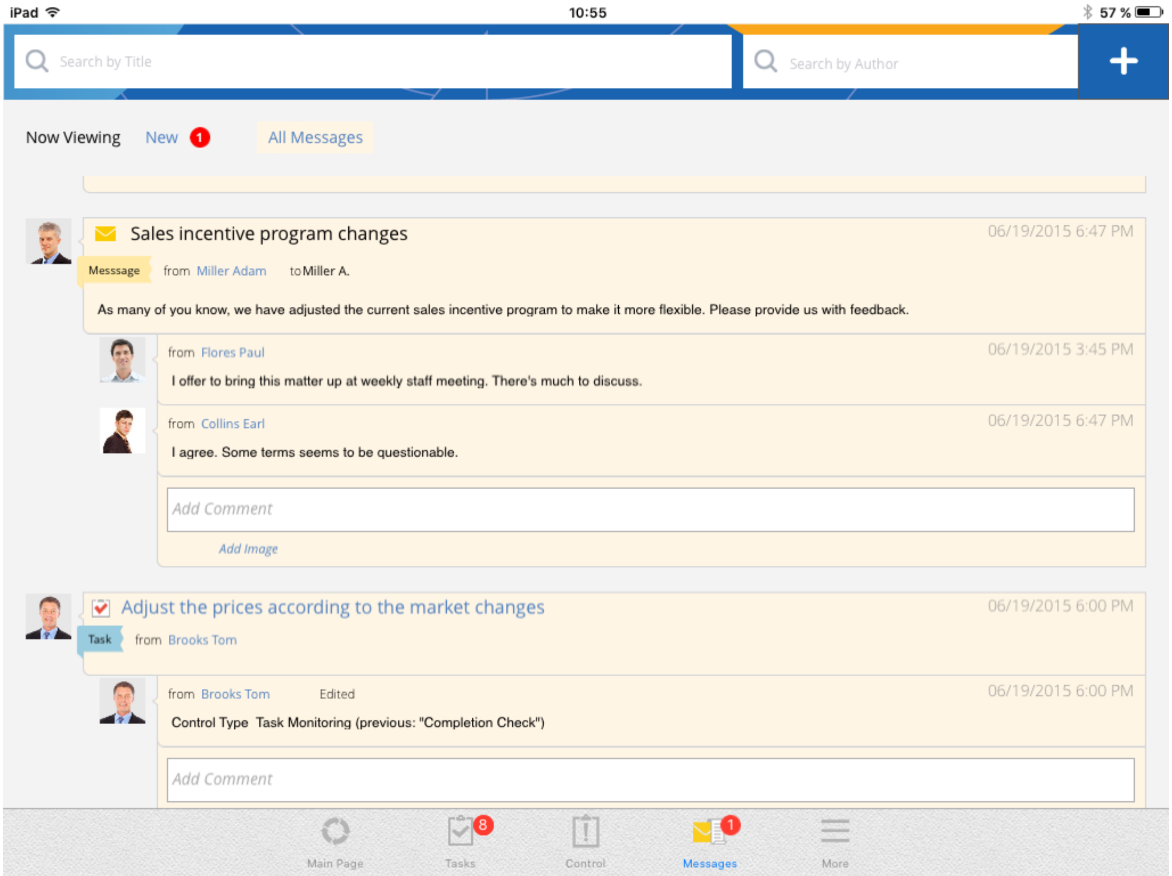


Fig. 244. Messages (iPad)

Mobile apps for document management can really benefit you.

Firstly, users always have access to business processes and can timely complete tasks and thus make sure that business processes move on.

Secondly, you are always up to date with all your business processes. Full access to the document workflow provides you with relevant information, allowing for fast decision-making.

Each employee, no matter where they are, can participate in the company's business processes and take full advantage of the system's functions.

Chapter 14. Useful References

Apart from the ELMA ECM+ quick-start manual, the following resources also describe basic functions of **ELMA** applications:

- Quick Start of **ELMA BPM Platform**
- Quick Start of **ELMA Web Portal**
- Quick Start of **ELMA CRM+**
- Quick Start of **ELMA Projects+**
- Quick Start of **ELMA KPI**

These manuals describe the key features of **ELMA**. For a detail description of functions, see **ELMA Help**.

References on each application are divided into three categories: for end-users, for implementation and for administrator, which allows for quick search of information.

On **ELMA website** http://www.elma-bpm.com you can find the general description and purchase conditions of **ELMA** applications. You can also press the **Ask Question** button to ask us a question.

The **online demo version** features all the basic functions of **ELMA** and is available on **ELMA website**. If you want to learn more about either application, you can download a demo version with exactly the same settings as the online version. It is available on the same page.

We continuously develop **ELMA** and its Platform-based components that deal with more specific tasks. You can find a list of these components and purchase conditions on **ELMA Store**: http://store.elma-bpm.com.

If you want to develop your own solutions, you will find the **ELMA Knowledge Base** rather useful: http://www.elma-bpm.com/kb.

If you are experiencing technical difficulties, please visit **ELMA technical support website**: http://support.elma-bpm.com.

If you need assistance with the system or have a question about partnership with **ELMA**, please contact us:

- Luxemburg: + 352 (2) 030 1140