Web Portal

User Manual

elma

Business Process and Performance Management System

Contents

Introduction

This book is a quick-start manual for **ELMA Web Portal**, one of the basic components of the system, which allows you to create a corporate portal basing on **ELMA BPM Platform**. This book 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 **Web Portal**.

It is expected that you are already familiar with the basic **ELMA** functions described in the **ELMA BPM Platform quick-start manual**, and that the system is installed and ready for work, including the 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:

- User Manual of **ELMA BPM Platform**
- User Manual of **ELMA Web Portal**
- User Manual of **ELMA ECM+**
- User Manual of **ELMA CRM+**
- User Manual of **ELMA Projects+**
- User Manual of **ELMA KPI**

For more details on the **Web Portal** 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 the **ELMA Web Portal**. 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.

Chapter 1. ELMA Web Application

ELMA Web Portal, or **ELMA Web Application**, is one of the key system components; it is a workspace for all users.

Here, you can exchange messages, make assignments, start and complete business process tasks, manage the calendar, documentation, entities and reports, manage time reports, create and store contactor's profiles and deals, record and plan any communications and do other numerous activities.

Additional applications for **ELMA**, such as **ELMA Projects+** and **ELMA CRM+**, add new sections and capabilities in the **ELMA Web Application**.

Once you enter **ELMA Web Application**, you find yourself on the main page, which displays links to the main system sections, user menu, set of main pages and portlets. The set of available sections and actions depends on the current user's access permissions. In these sections, the user can find all the necessary information and perform activities related to his or her duties.

ELMA lets you customize user interfaces to make interaction with the system more efficient.

Chapter 2. Managing accounts

This chapter gives a description of user license types and ways to manage the **ELMA** user accounts.

A user is an employee who uses **ELMA** functions to perform their work duties.

A user account contains all the information required to authenticate the user in the system and provide access to their personal data and settings.

ELMA allows to create accounts both manually (described in the ELMA BPM Platform Quick-Start Manual and in **ELMA Help**) and by importing users form **LDAP**, (for more details, see section 2.2 of the given manual). The accounts are managed by the **ELMA** Administrator.

User License Types

A User License determined the rights of a user to work in **ELMA Web Application** with their own login and password.

ELMA features named licenses, which limit the number of unblocked users in **ELMA**. Each user takes one named license. In order to make a license available, you can block a certain user who will then not be able to enter the system and work in the **Web Application**.

You can find general information about the licenses in **Administration → Main Page → License Information** (Fig.1). For more details, see **Administration → System → Components** (Fig.2).
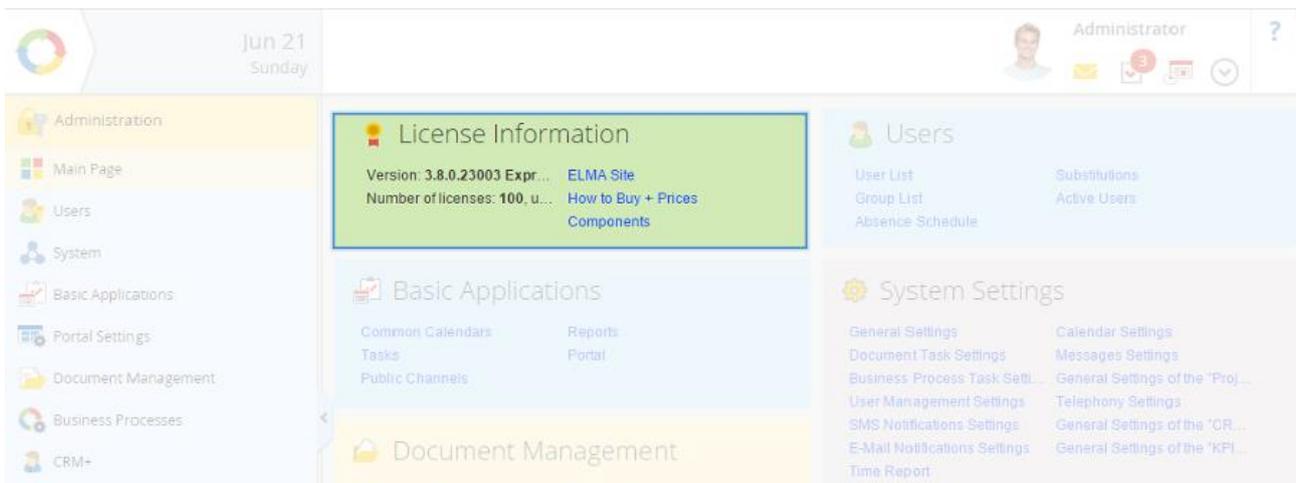
Fig. 1. Administration → Main Page → License Information
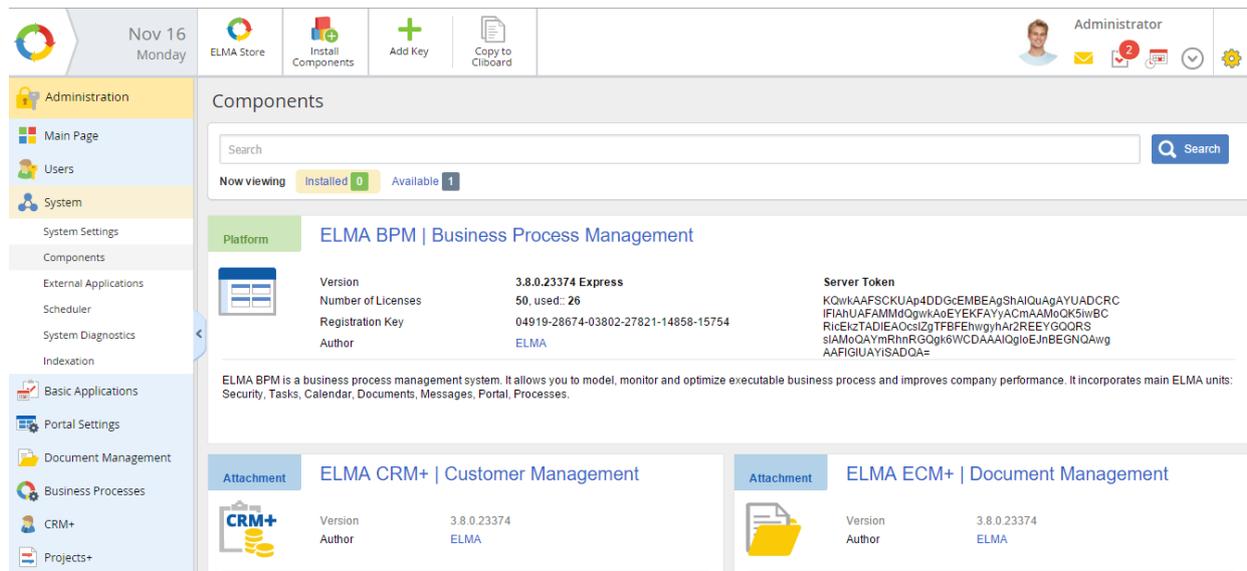
Fig. 2. Administration → System → Components

If you wish to activate additional **ELMA** licenses, contact your sales officer or **ELMA** partner and provide the number of additional licenses required, the registration key and the server token. Once the additional licenses are paid for, you will receive an activation key. Then go to **Administration → System → Components** (Fig.2), click **Add Key** and enter the key in the window provided (Fig.3).
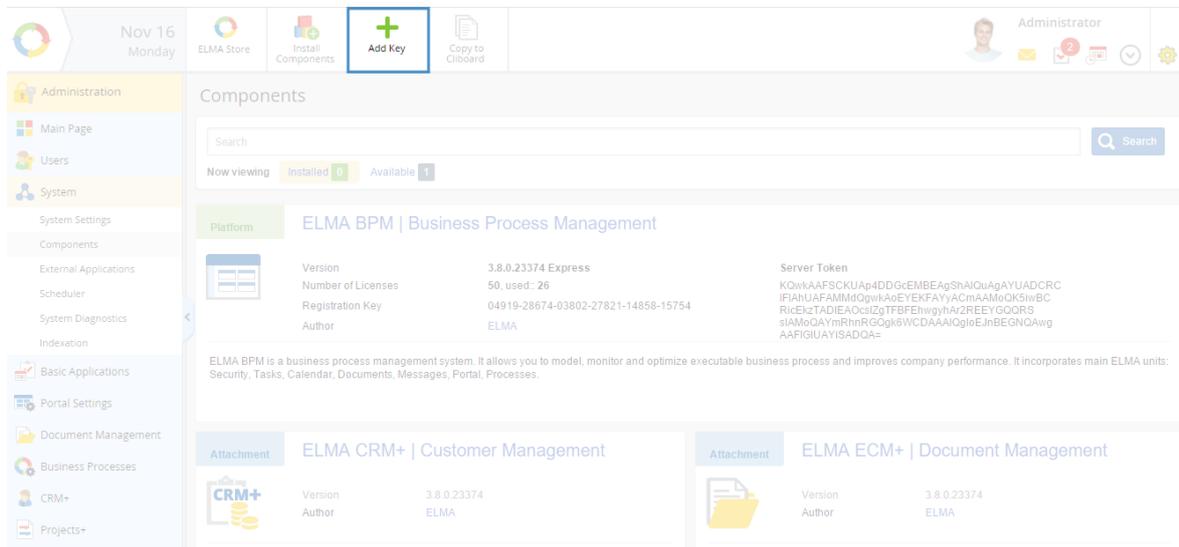
Fig. 3. Administration → System → Components, Add Key button

In case of competitive licenses, the **User Authorization Session** (Fig.4) section will be rather interesting for the system administrator. It displays information about the registered sessions of active users and allows to delete sessions to make licenses available. For this section, go to **Administration → Users** and click on **Active Users**.

Fig. 4. Authorized Users' Sessions

When there are no responses for a certain time interval, the active session expires. The time interval is set in **System Security Settings,** which you can find in **Administration → System**.

Importing from LDAP

If your company uses an **LDAP** sever (e.g., Active Directory or 389 Directory Server), you can add user data from the **LDAP** catalog and set a **Single Sign On** in **ELMA**.

To import users from **LDAP** go to **Administration → System → System Settings** and then to the **LDAP Integration** section (Fig.5). The user settings are managed by the **ELMA** system administrator, and so is the data import from **LDAP**.
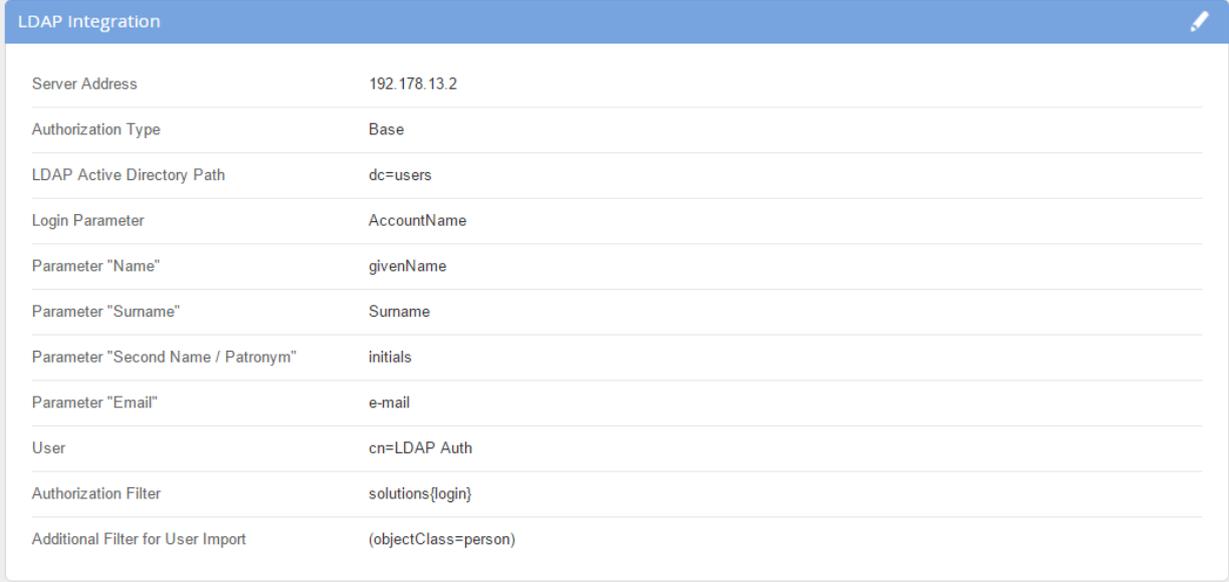
LDAP Integration	
Server Address	192.178.13.2
Authorization Type	Base
LDAP Active Directory Path	dc=users
Login Parameter	AccountName
Parameter "Name"	givenName
Parameter "Surname"	Surname
Parameter "Second Name / Patronym"	initials
Parameter "Email"	e-mail
User	cn=LDAP Auth
Authorization Filter	solutions{login}
Additional Filter for User Import	(objectClass=person)

Fig. 5. Example of settings for the LDAP Integration

Fig. shows an example of settings for the **LDAP Integration** section. For a detailed description of all the fields, see **ELMA Help**.

Once the **LDAP Integration** section is configured, you can import users from **LDAP**. To do so, go to **Administration → Users** (Fig. 6) and click on **Import → Users from LDAP.** Once you do that, the **Import from LDAP** page will open (Fig. 7).

When importing from **LDAP** (Fig.8) the first thing to do is to assign groups for all the imported users (the default group is **All Users**, but you can change it) and click **Search**.
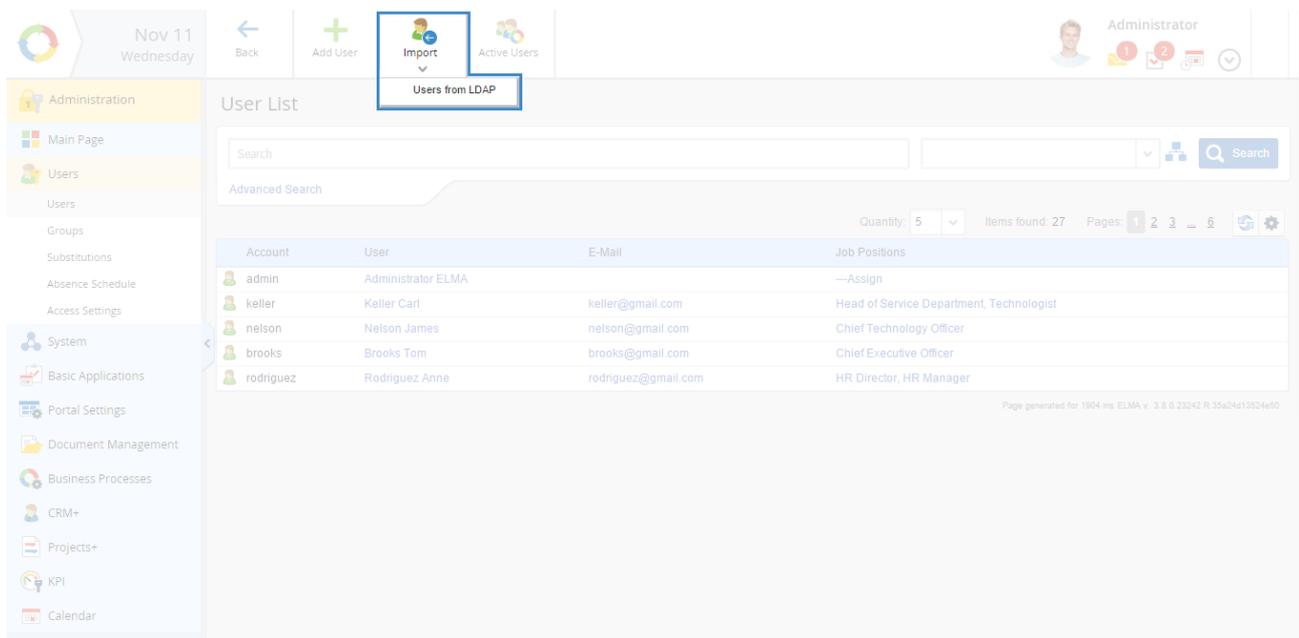
Fig. 6. User Import from LDAP

Fig. 7. First phase of User Import from LDAP

If the settings for integration with **LDAP** are correct, you will see a list of users available for import (Fig.8). If you type a part of a user's login in the search filed and press **Search**, the system will offer you a list of users, whose logins contain the same combination of symbols.

Select the user that you want to import and then click **Import** in the top menu of the page. You can only import users if you have available **ELMA** licenses.
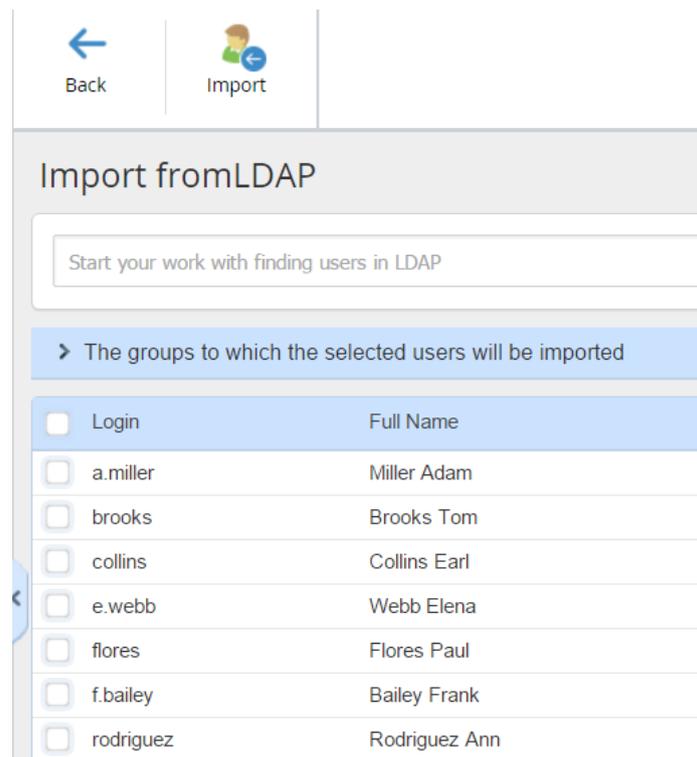
Fig. 8. List of users to be imported to ELMA from LDAP

When you import users for the first time, they are marked by different colors:

- Green for users who were successfully imported to **ELMA**;
- Red for users imported to **ELMA** but blocked or inactive because they cannot be authorized in the system;
- White for users who are not yet imported;
- Yellow for users that exist in both **ELMA** and the **LDAP** database, but their data differs. During the import, the user data in the system is replaced by the data from **LDAP**, including the password.

The information about personal user accounts imported from **LDAP** is not stored directly in **ELMA**. When such users sign in the system, the data that they enter is compared to the data stored in **LDAP**. The user pages of the users imported from **LDAP** are marked accordingly.

User Page

Along with the user account, **ELMA** creates a user page. The user page displays all the main information about the user and offers basic functions to manage the user's account (for the system administrator).

Any system user can see a limited version of any other user's page. It shows a photo, contact details and the user's job position (Fig.9). There are links below the photo that you can use to assign a task or activity and send a message.

Fig. 9. User page accessible to all the system users

Each user has access to their page or profile (Fig.10). According to system settings, you might or might not have the right to edit it. To view your profile, click on your surname or photo displayed in the top right corner of any page of the **Web Application**.
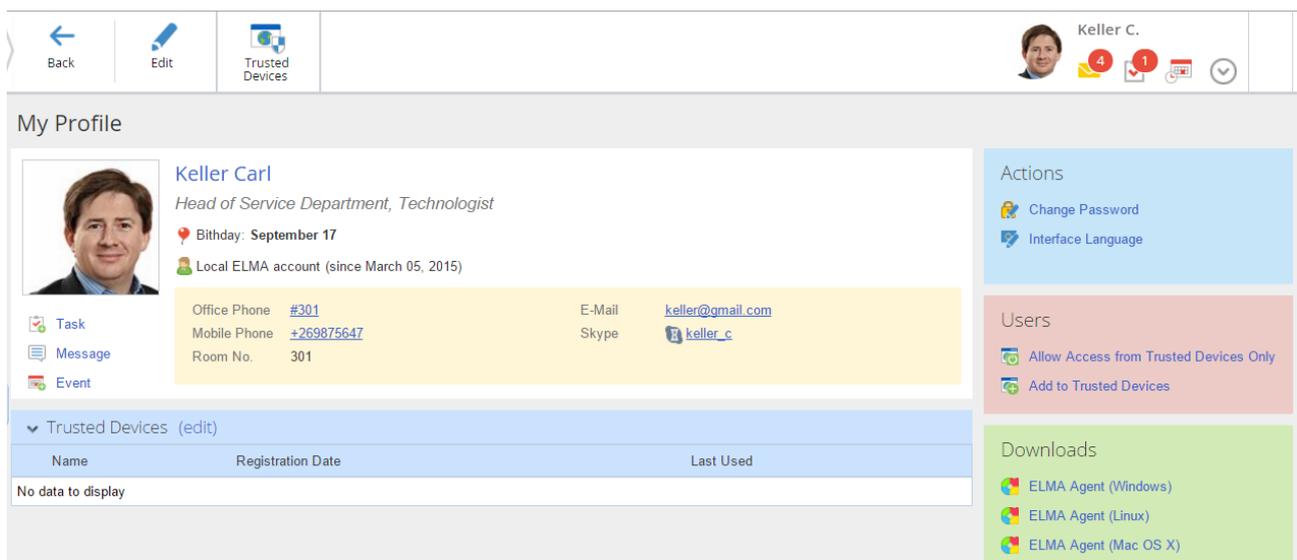
Fig. 10. User profile

The profile page (Fig.10) includes:

- User's personal data and contact details.
- A list of trusted devices. By clicking **Edit,** you can open the device control page.
- The **Downloads** section. It contains links to installation software for the following plugins and programs: **ELMA Agent**, **ELMA Outlook Plugin**, **ELMA Designe**r (access to **ELMA Designer** required).
- The **Actions** section. It gives links to activities accessible to the current user, e.g., change password, assign absence, assign substitute user, change interface language.
- The **Security** section. It allows you to add your current browser to the list of trusted devices and permit access from trusted devices only (depends on access permissions, for more details see Chapter 3).

For a more detailed description of these capabilities, see the **ELMA Help**.

If you have permission to edit your profile, you will have the **Edit** button available. With the Edit button, you can change your personal data, choose interfaces and manage tasks and notification settings. Even the system administrator cannot change the password of a user imported from **LDAP**, since the password is not stored in **ELMA** and can only be changed in **LDAP**. Any user can edit their page and change the password by default; these permissions are managed by the system administrator.

If you want to forbid a user to change their password or edit their profile, go to **Administration → Application Access Settings → Global Access Settings** and add the user to the following groups: **Forbid to edit personal profile** or **Forbid user to change password**.

The Administrator or an authorized user can edit the user pages, create new users and block the existing ones. To manage accounts, go to **Administration → Users → User List**, here you will find a complete list of all users (by default, the blocked users are not displayed).

Fig. 11. Administration → Users section

If you click on the name in the User column, you will open the user's page or profile which contains full information about the user (Fig. 12).

A user does not have full access to their profile; they only see their user page (Fig. 12), while the Administrator has access to additional features. In the **Users** section, they can change the password (except for the users imported from **LDAP**), assign absence, add a substitution or block a user. The Administrator can also see the user's groups and privileges (access permissions for system sections and settings).

When the page is opened for editing by the Administrator, all the fields are available including for adding and deleting user from groups.

Fig.12. User Profile opened for editing by the Administrator

Chapter 3. Access to the System

ELMA Web Application is accessible only to those users who have accounts in the system. Once authorized and signed in, they may work in **ELMA Web Application** according to their access permissions.

Authorization means that a user is identified, authenticated and provided with access permissions.

The default authorization is with login and password. You can set additional options to enhance security:

• Authorization by certificate.

• Authorization with **Single Sign On** technology (SSO). You can import users from Active Directory and use these accounts for user authentication.

• Authorization with login and password with limited access from trusted devices only.

ELMA Web Application supports the following web-browsers: Mozilla Firefox, Internet Explorer, Google Chrome and Safari.

The system administrator manages the application's access settings in the internal network and can forbid or limit access from Internet.

User Authorization

To start working in **ELMA Web Application**, enter the address or **ELMA server** name in the address bar of your browser. Then specify the port for connection to the **ELMA web-server**. Enter login and password (Fig.13) in the provided window, and click **Sign in**.

Fig. 13. Authorization window

If the login and password are correct, you access the system. Any activity within the system is matched directly to the user authorized.

If the login and password are incorrect, an error message appears and access is denied.

Authorization by Certificate

For more IT security, you can add authorization by certificate.

A **Certificate** is a document issued by a certification center confirming that the user has an open key or other specific attributes.

To make authorization by certificate available, adjust certain settings on the server (for more details, see **ELMA Help**):

- Set a certification center (you can either use your company's corporate server or turn to an organization that offers certification services);

- Receive root certificates;
- Import the certificates (external/internal) into the web-browser;
- In the **Web Application**, go to **Administration → System → System Settings;** in the **Security** section choose **Yes** in the **Allow to sign in by certificate** field (Fig.14).

Adjust settings on the user's PC:

- Install the CAPICOM plugin in the web-browser (if you are using Internet Explorer). Download it from the official Microsoft web-site;
- Receive user certificates;
- Import the certificates (external/internal) into the web-browser;
- Assign the certificate to the user.
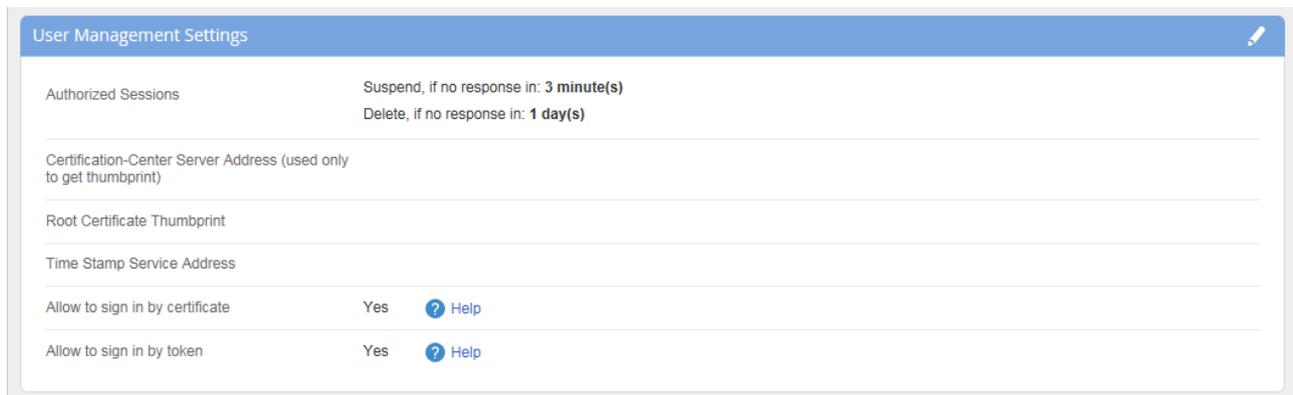
Fig.14. User Management Settings

You can access **ELMA** with a certificate only in Mozilla Firefox and Internet Explorer.

Certificates are assigned to a user's PC. Once you have signed in with login and password, go to the user profile and select **Bind Certificate** in the **Users** section (Fig.15).
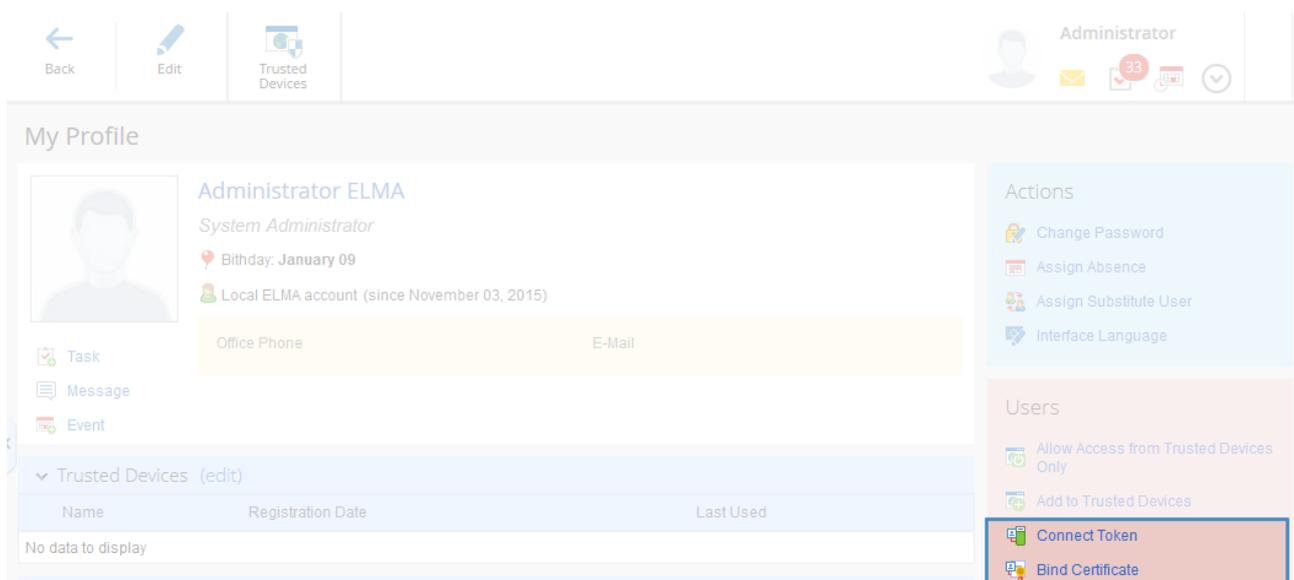
Fig.15. Binding a Certificate

To sign in with a certificate, click the key icon on the right side of the **Sign in** button in the sign-in window (Fig.13).

Fig.16. Authorization with Certificate

For more details on certificate access, see **ELMA Help**, for additional information see **ELMA Knowledge Base**.

Single Sign On

For organizations that use an LDAP-server (e.g., Active Directory or 389 Directory Server), **ELMA** provides the **Single Sign On** authorization (SSO).

To use it, there are certain conditions that you must meet:

- **ELMA** must be installed on the **IIS server** (Internet Information Services).
- For this feature to work, all the PCs with Windows installed (including the virtual ones) must be in one domain.
- To use **Single Sign On**, users must be first imported from LDAP (see Chapter 2).
- To configure the **Single Sign On**, a user must have **IIS** administrator access permissions.

The **Single Sign On** settings for **ELMA** deployed on a server with Windows Server 2008 Enterprise are described in **Help**. On users' PCs, add **ELMA server** to Intranet and set a low security level. If **Single Sign On** is working, the **ELMA** sign-in window does not appear.

Trusted Devices

Another way to increase security in **ELMA** is allowing to enter the system from trusted devices only. Trusted devices work combined with any other **ELMA** authorization method.

Trusted devices are:

- Browsers;
- Tablets;
- Certificates;

To limit access to these trusted devices the user has to do the following:

- Make a list of trusted devices;
- Allow access only from the list

To add a device to the list of trusted devices, first authorize in the system from this device (browser). Then, click **Add to Trusted Devices** in the **User Management** section of your profile (Fig.17).

Your list of trusted devices is shown in the **Trusted Devices** section (Fig. 17). To manage the list, click **Edit** or the **Trusted Devices** button in the top menu of your user page (Fig.17).

Fig.17. User Profile. Trusted Devices management

Fig.18. Trusted Devices section of the user's profile

To make access available only from the listed devices, activate the **Allow Access from Trusted Devices Only** option in the **User** section (Fig. 18).

After that, you can only sign in from the devices listed as trusted. If you try to access the system from another device, you will receive a notification about wrong login or password.

Chapter 4. Organizing a Shared Workspace

The main goal of a shared workspace is to give each user access to different information from a single point of entry. Coming from different sources, this information is combined, structured and displayed in the way most efficient for employees to fulfill their job duties. It provides a basis for communication and information processing, saving time for search and data integration.

ELMA provides a shared workspace and offers a wide range of functions and capabilities for usage and customization.

If the **ELMA Web Application** is set correctly, the users receive access to all the needed information according to their duties. Within the **Web Application**, users can assign and complete tasks, send messages and take part in conversations, add their work schedule to the calendar, start business processes and participate in them, work with electronic documents and do many other things. For executives, the **ELMA Web Application** provides tools to monitor business processes and control employee compliance. Moreover, with the **ELMA KPI** application you can also monitor the employee performance.

Flexible access permissions to different system sections, documents or objects allow the employees of all departments to work in a shared workspace, providing access according to their work functions and duties.

In this chapter, you will learn how to organize fast information exchange within the **ELMA Web Application**. The following chapters describe other infomedia tools available in **ELMA**.

Messages

The **Messages** section is an important feature of the **ELMA Web Application** (**Ошибка! Источник ссылки не найден.**Fig.19). It displays all the notifications on system events and changes as well as messages from other users (e.g., created or edited tasks, documents, related comments, etc.).

When you create or edit documents, tasks, events, relationships, projects and other system elements, **ELMA** automatically sends system messages to the users who are involved.
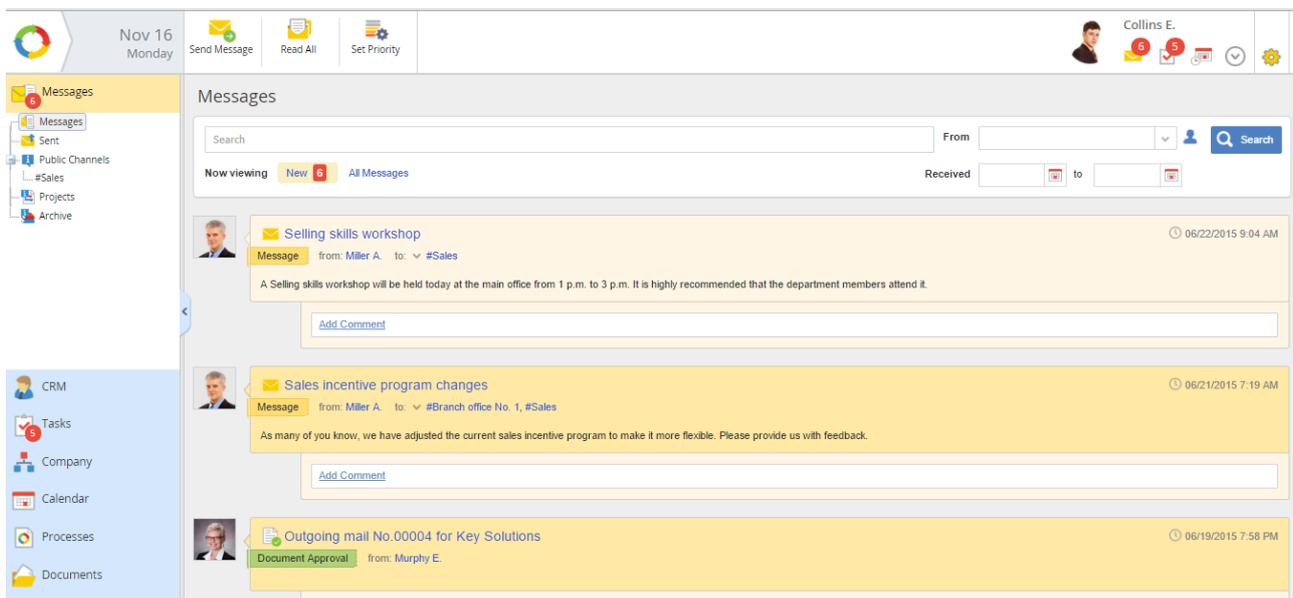
Fig.19. Messages section

To send a message, click **Send Message**. By default, this button is located in the **Messages** section and on the main page. When customizing the interface, you can place it in any other section of **ELMA**.

When you create a message, choose the information channel and/or users who you want to address . You can attach a file from your computer or a document created in **ELMA**. Once a message is sent, you cannot delete or edit it, all the information is now recorded in the system.

ELMA shows unread messages highlighted bright. Messages marked as read appear in a pale color. If you click on the unread message, it will automatically change its color and the system will mark it as read.

The **Messages** section shows the message itself and the related comments. You can leave a comment or ask a question in a special field.

The most recent messages are displayed at the top of the list.

By default, this section displays the last 10 messages and 10 related comments. To view more messages click **Next** under the last message or scroll down the page. Click on the subject of the message to open its page.

The **Messages** section features **Quick Search** of messages by theme and by content, as well as by author and creation date. You can also set message importance to the messages received through info channels, manage notifications in a channel and set exceptions for event notifications. This way, each user can only receive the information that is important to them.

Public Channels

In a shared information space, it is important to facilitate group discussions and yet guarantee confidentiality of some information categories.

For such group discussions, the **Messages** section provides public information channels.

Public channels are created by the system administrator who also sets access permission for a user or a group of users. To create a channel and set permissions go to **Administration → Basic Applications → Public Channels** (Fig.20).

Fig.20. Administration → Basic Application → Public Channels

There are three sections available:

- **Public Channels** - Users can talk and discuss different subjects (Fig.21);
- **Projects** - Intended for communication within a certain project. When you activate the **ELMA Projects+** application, this feature becomes available to those users who have access to the application. When creating a project, you can also create an information channel for it, giving access only to project members;
- **Archive** - List of those information channels that were sent to archive.
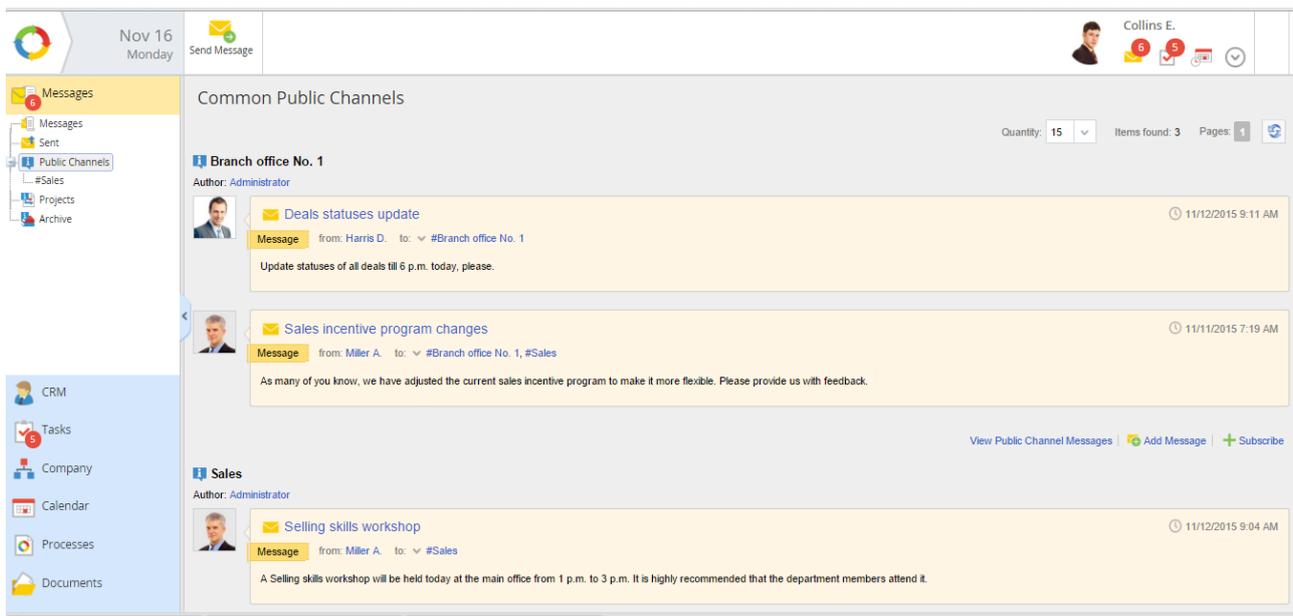
Fig.21. Public Channels section. Common Public Channels.

It is most effective to create several public channels with different objectives and access permissions.

A common public channel is open for comments and is accessible to all users. Its main function is to notify all system users about upcoming events, activities and changes within the company. Each user can participate in discussions, creating messages in the channel.

Separate public channels are meant for departments, branch offices or groups of employees who work on the same issue. They allow to limit discussions only to a certain group of users. Such channels are open for comments and messages from those users who have access. For example, you can create a channel for the Sales Department or a separate channel for executives only.

There are channels that do not allow comments; use them for fast notification of users. You can limit the number of users allowed to create notifications in such channels. For example, you can make messaging in the news channel available only to the employees in charge.

To create a public channel, go to **Administration → Basic Applications → Public Channels** (Fig.20), click the **Create** button located in the top menu, fill in the creation form (Fig.22) and save it.

Fig.22. Public Channel creation form

To limit access, set the **Open Channel** option button to **No**. In this case, all subscriptions are managed by the administrator.

To forbid subscriptions and comments in the channel, set the corresponding option buttons to **No**. To close the channel, set the **Archive** option button to **Yes**.

The system administrator can change these settings for any existing public channel.

Once a channel is created, you have to manage its subscriptions. Go to the page that lists all the public channel (Fig. 20), and click on a channel's name to open its page. Then, set access permissions in the **Subscribers** tab (Fig.23).

Fig.23 Public channel's page. Subscribers tab.

Levels of access to public channels:

The **Read/Comment** level gives permissions to view channel messages and comment them.

The **Edit** level gives the same permissions as the **Read/Comment** level, and also allows to send messages to the channel.

Full Access provides full access to a public channel and allows to give access permissions to other users. To have a full access to a channel it is not enough to have the permissions of this level. You also need additional permissions to administrate public channels (in **Administration → Users → Access Settings → Global Access Settings → Public Channels Administration**).

A system administrator can create, archive or change access permissions for public channels at any time. The public channels and their flexible settings provide a convenient space for notifications and discussions of company's events.

Interfaces

If you are using **ELMA Web Application** as your company's shared workspace, we recommend you to customize its interfaces.

ELMA allows to change and customize user interfaces without programming, using an interface visual editor.

You can customize interfaces for each group of users by making the highly used functions easily accessible and taking the unused sections out of the menu. For example, it would be useful for a sales department to have contract templates and links to frequently used processes right on their main page; while records management employees would want links to document registry and mail processing.

For interface settings, go to **Administration → Portal Settings → Interfaces** (Fig.24). Here you can find a list of all the system interfaces. In the beginning, there is only the **Default Interface** and **Lite Interface**.
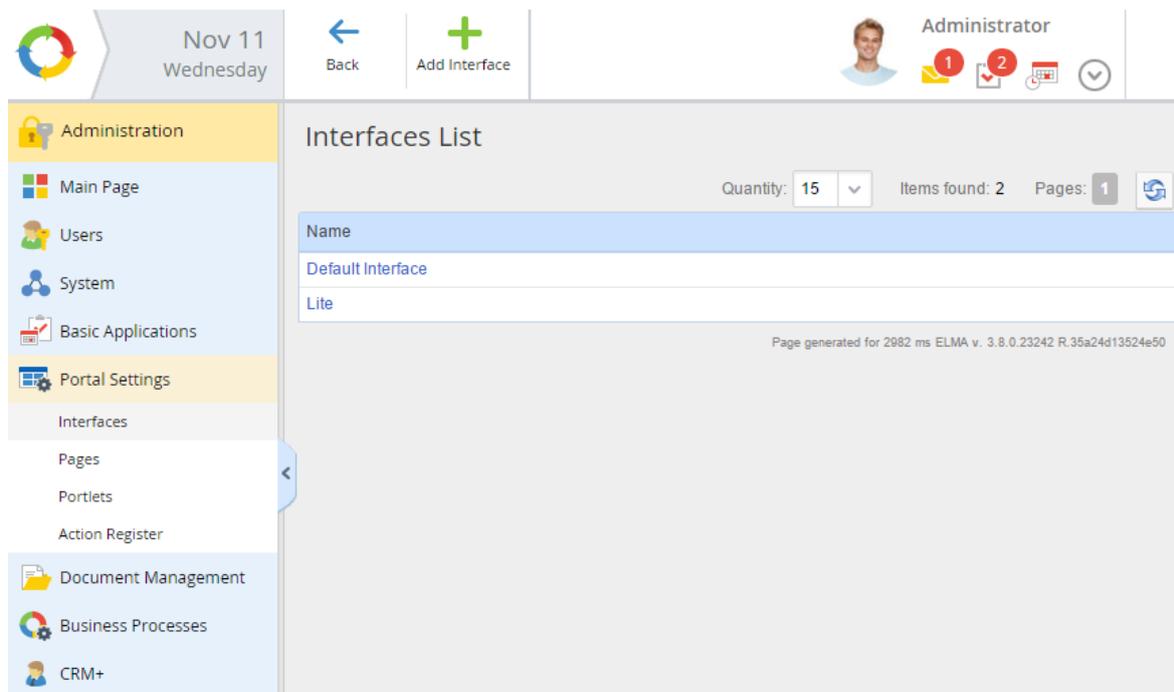
Fig.24. Interfaces

For more details on interface settings, see **ELMA Help** and **ELMA BPM Platform quick-start manual**.

E-Mail Interface

For people who use email services in their work, we created the **ELMA Rich e-mail interface** (**ELMA.RE**). **ELMA.RE** sends task notifications directly to your e-mail account and allows you to make a decision right in your mailing agent.

All the incoming tasks are placed in your Inbox (the **Incoming Mail** folder). You can create a separate folder and filter your incoming tasks to see them separately from the rest of your e-mails.

Instead of sending a simple notification, **ELMA.RE** also provides all the necessary information to make a decision. Say, you are assigned with a task to consider a document. **ELMA.RE** sends you this document along with other relevant information, providing all the buttons necessary to complete the task.

ELMA.RE is available to any user. To set the **Rich** task notification, go to your profile, open it for editing, go to **Notification Settings** (Fig.25) and select this notification type for your incoming tasks.
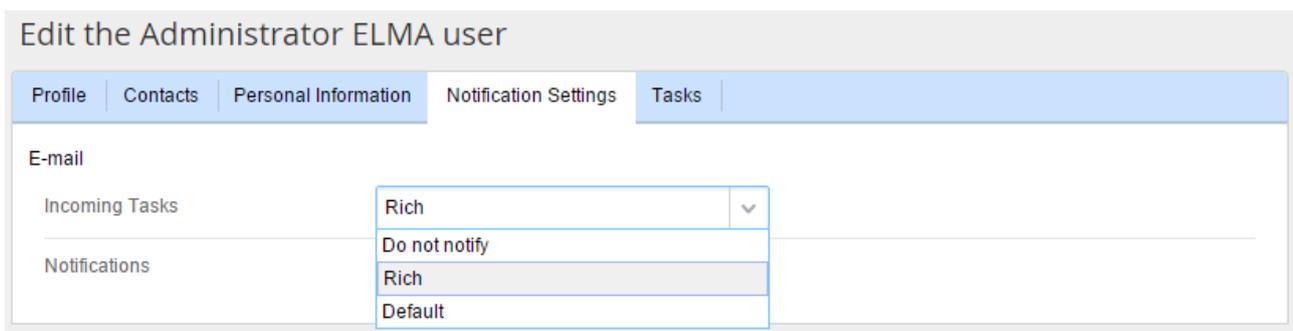
Fig.25. Editing user profile. Notification Settings tab

The e-mail message format is changed to HTML, which features a better layout and displays links as buttons that allow you to perform certain actions.

For the Rich notification function to work, you must be authorized in the system and connected to it. If you are not authorized, you will be directed to the sign in page.

You can find an example of a Rich notification in Fig.26.

Fig.26. Rich notification on an incoming task

ELMA Agent

ELMA Agent is a software program designed to receive notifications about system events and facilitate work with documentation. With **ELMA Agent**, users receive system notifications right on time, being able to react quickly to anything that is going on.

If you have an **ELMA server** installed and working, you can install **ELMA Agent** on each user PC. No additional registration required.

With **ELMA Agent,** you can receive the following information (without actually referring to the system):

- Notifications on **ELMA** working activities: tasks being assigned and completed, meetings with customers arranged, documentation created;
- Notifications from the public channels;
- Information about electronic documents being edited and saved on the server, or about new document versions created;
- Fast access to the documents that you have worked with before. The **Documents** tab displays all the documents that are now open or have been recently opened in **ELMA**. You can easily edit and save documents or create new document versions right on the server.
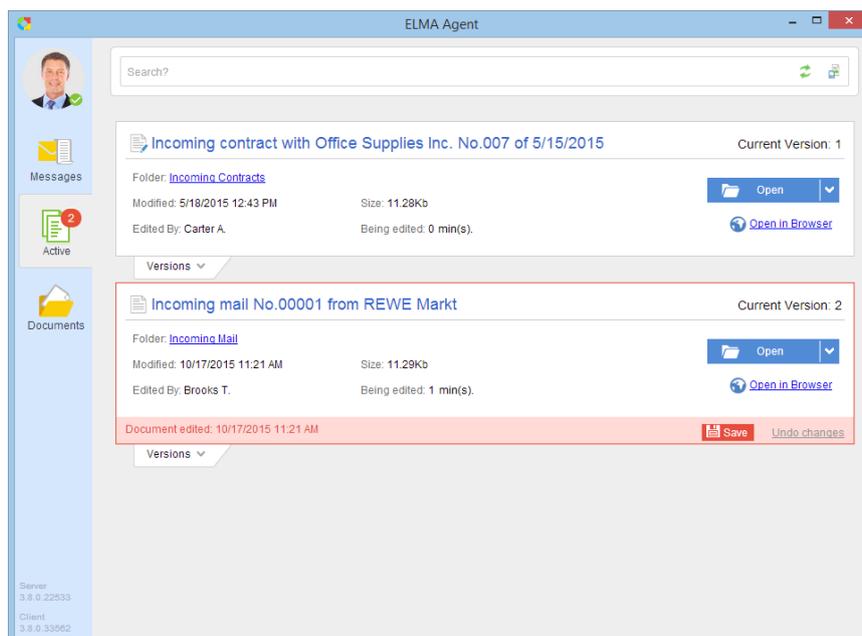
Fig.27. ELMA Agent. Messages section

ELMA Agent works with Windows, Mac OS and Linux. For installation, setup and basic work description see **ELMA BPM Platform manual** and **ELMA Help**.

Chapter 5. Employee Schedule Compliance

With **ELMA Web Application,** you can easily assign tasks to your employees and monitor task completion to increase the efficiency and quality of work.

User tasks

By default, any **ELMA Web Application** user can create, approve, execute and control user tasks.

To create a task, click **Task** in the top menu of the main page (Fig.28), or in the **Tasks** section of the main menu. To open the main menu move your mouse pointer over the **ELMA** logo in the top-left corner of the main page and wait until the blue button appears. This button opens the main menu.

You can also create tasks directly from customers' pages and other objects of the web portal. When customizing the interface, you can place the task buttons on other portal pages too.
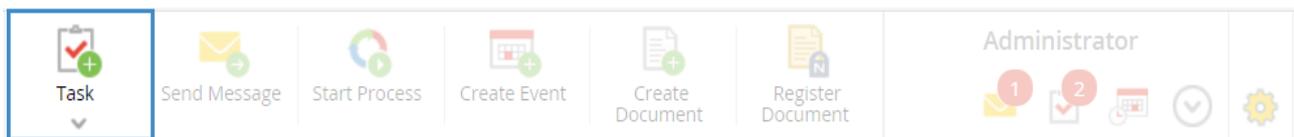
Fig.28. Task creation button

User tasks are divided into simple and periodical or repeated tasks. When creating a periodical task, you have to set its frequency. Each time **ELMA** will automatically create this task from a template and assign it to all the participants, just as specified.

All the information about tasks created, completed or monitored by a user is available in the **Tasks** section (Fig.29). This section not only shows user tasks (that is, tasks created by other employees) but also displays tasks related to business processes, documentation and projects.

Fig.29. Tasks section

The **Tasks** section allows you to:

- View different groups of tasks:
  - **Incoming tasks** – Tasks assigned to you;
  - **Outgoing tasks** – Tasks assigned by you;
  - **Tasks under control** – Tasks under your control;
  - **Periodic tasks**;
  - **Tasks within department** – All the current and outdated tasks assigned to employees of a department (this section is only available to executives);
  - **Tasks by department** – All the current, outdated and completed tasks, assigned by employees of a department (this section is only available to executives);
  - **Task archive** – List of completed and controlled tasks (this section is only available to executives);
- Create and complete tasks;
- Submit a time report about completed work;
- Search tasks.

A user can have the following roles within a task:

- **Author** - Person who creates the task;
- **Executor** - User responsible for the task's execution. This person is assigned by the task author, but can be changed during task execution.
- **Co-executor** - User who works on the task together with the executor but is not responsible for the task. The co-executor receives the same task notifications as the executor.

- **Observer** - User who receives notifications about any task activities.
- **Approver** - User who approves the task.
- **Supervisor** - User who controls the execution and completion of the task.

Regardless of their role, all these users can view the task's page. The superiors of the author, executor and co-executor (according to the organization structure) also have permissions to view the task's page.

The system administrator can allow certain user groups to view pages of any tasks within the company.

The task can be edited by the author or their superior (according to the organization structure).

When you create a user task (Fig. 30), specify the task name, the executor and the due date. You can also define a category and priority; add a description, a document or a computer file. There are additional options available in the top menu of the task creation page. For example, you can assign monitoring and control (**Control** button) to a certain employee (usually, a superior). By default, the tasks author is selected as the supervisor. You can add an approver by clicking **Approver**.

There is always one person responsible for the task, the executor. However, you can add co-executors (**Co-executors** button). They receive information about the task and participate in working activities.

You can also specify the time limit (**Time Report Limit** button). In this case, the time report on this task will be limited with this planned time.

All the participants and any actions concerning the task are displayed on the task page.

Fig.30. Task creation form

You can see the task's page in **Tasks** section (Fig.29). Use the **Actions** button in the top menu to create subtasks, add comments, ask question, reassign the task, monitor its execution, send for approval and add observers. In addition, the task author and their superior can edit the task and change its due date.

Fig.31 Task display form

The **Completed** button states the fact that the work is complete. With the **Cannot Execute** button you can stop the task execution; the supervisor will be notified about it. They can either reopen the task or cancel it.

Once you complete a task, click the **Completed** button. In the provided window, you can add a comment about the task, attach a file from the local computer or a document created in the system, and confirm the task completion (Fig. 32).
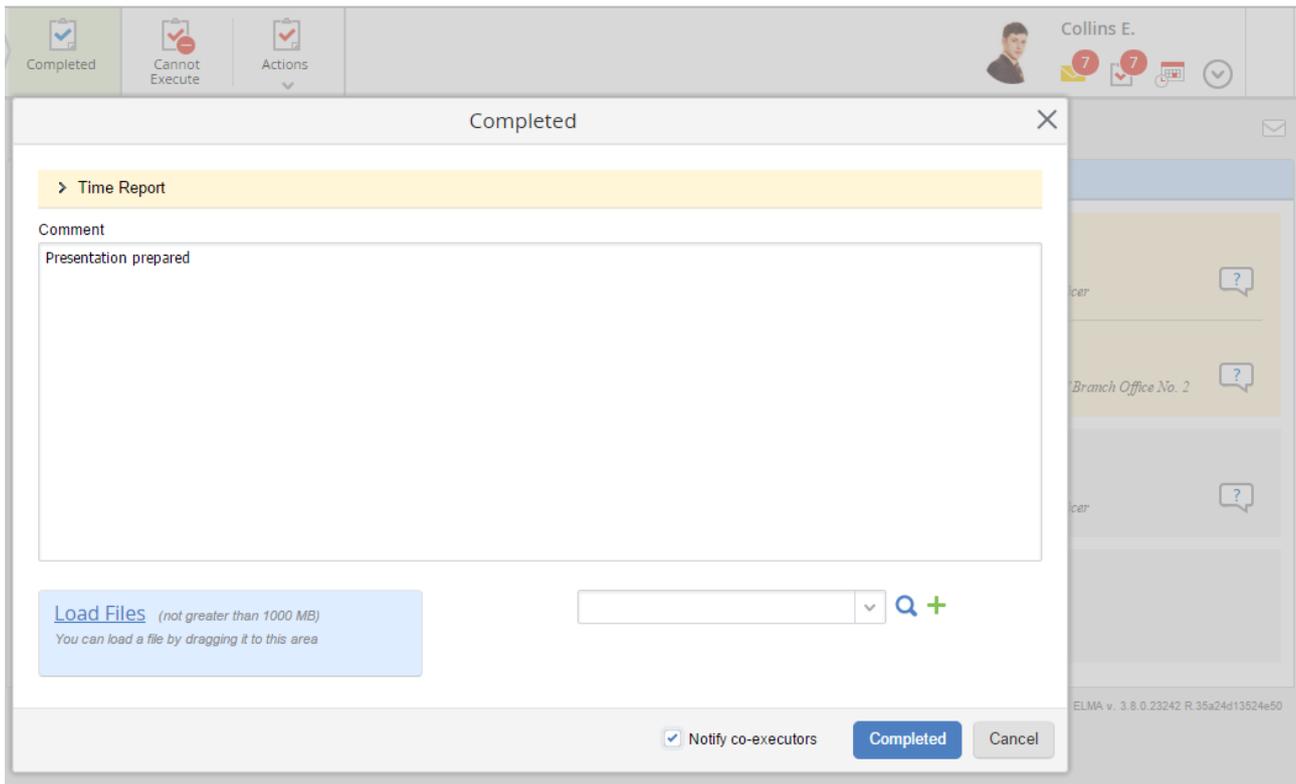
Fig.32. Task completion

Once a task is complete, its status changes to *Completed*. If control of task completion is assigned, the task will be directed to the supervisor.

Task Control

When the executor completes a task, they click **Completed** on the task page, leave a comment if necessary and attach documents or files. Then the task goes to the user specified as the task supervisor (by default it is the task author). They accept the work and mark the task as completed. If necessary, they can send the task back into work, leaving a comment or making changes to the task. Once the control is over, the task is considered done and is sent to the archive.

To manage settings and to assign the supervisor, use the **Control** active button (Fig.33), when creating the task. By default, the task author is also the task supervisor.

Fig.33. Task creation page. Control button and Control field

There are three types of task control:

- **Notify when Completed** - Supervisor receives a notification when the task is complete. They not only receive information but can also approve or reject the result of work.
- **Completion Check** - Supervisor receives a notification when the task is completed. Such tasks are displayed in the supervisor's **Completion Check** section (Fig.34). When the executor finishes work on the task (clicks **Completed**), **ELMA** assigns the supervisor with a task to check the work results. At this point, the supervisor can send the task back into work.

Fig.34. Completion Check subsection

- **Task Monitoring** - Supervisor receives a notification when the task is complete. Such tasks are displayed in the supervisor's **Task Monitoring** section (Fig.35). This type of control allows to monitor the entire work process (the task becomes available in the supervisor's **Task Monitoring** section right after it is created). Once the task is completed, it appears in the supervisor's **Completion check** section. At this moment, the supervisor can send the task back into work.

Fig.35.Task Monitoring subsection

To mark the task as completed, click **Completed** in the task's top menu (Fig.36). To send the task back into work, click **Reopen**.

Fig.36 Task control

The task author or supervisor can manage the task control settings. They can change the supervisor, control type or cancel it. To change the type of control go to the top menu of the task page and click **Actions → Change Control Type**.

My Department

My Department is another tool for schedule compliance monitoring; you can find it in the **Tasks** section (Fig.37).

My Department is available only to Heads of Departments. It displays information about all the tasks of their employees, making it easy to assess the workload and see users with overdue tasks.

Fig. 37. My Department section. Department's active tasks

The tasks are grouped according to users who they are assigned to; open a user's panel to see their task list.

The **Tasks from Department** filter in the **My Department**'s section shows all the tasks assigned by your employees. They are divided into active and completed tasks; the overdue tasks are marked separately.

Reports

For better schedule compliance monitoring, **ELMA** features several reports that allow for quick analysis of the employees' work. You can make and view reports in the **Reports** section.

To work with the **Reports** section or with a certain report, you need corresponding access permissions. By default, this section (as well as any other system report) is only available to the system administrator. To set access permission (only administrator can do it), go to **Administration → Basic Applications → Reports → Access permissions for the "Reports" module**.

By default, the **Reports** section allows you to make the following schedule compliance reports:

- **Aggregate report on schedule compliance;**
- **Report on schedule compliance**.

There is also the **Report on business activity,** which displays all the tasks, communication, calendar events, deals and leads over a certain time for selected **ELMA** users.

Aggregate report on schedule compliance

The aggregate report on schedule compliance displays average statistics on user tasks over a certain period of time:

- Total number of tasks;
- Number of complete tasks;
- Number of active tasks;
- Number of tasks completed on time;
- Number of tasks overdue;
- Percentage of tasks completed on time;
- Number of tasks overdue.

The aggregate report does not include tasks with the following statuses: Pending Pre-Approval, Pre-Approval Rejected, Closed by Author, Cannot Execute and Checked

To generate this report, go to **Reports** section, and then click on the **Aggregated report on schedule compliance**. On the page that appears, fill in all the required fields and click the **Show Report** button in the top menu of the current page (Fig.38).

Fig. 38. Setting parameters to generate an aggregate report

In Fig.39 you can see a fragment of **Aggregate report on schedule compliance.**

Fig. 39. Example of Aggregate report on schedule compliance

If you click on a number in blue, the report will display a list of tasks assigned to this column according to the user in the **User** column.

Report on Schedule Compliance

The report on schedule compliance shows detailed information about user tasks over certain period of time, displaying a list of general tasks, tasks completed on time, tasks overdue, etc. The table columns vary according to the selected layout. The report on schedule compliance shows only the tasks with planned due dates (**End date** on the tasks page) that fit in the specified timeline.

To generate a report on schedule compliance, go to **Reports** and click on the **Report on schedule compliance link**. Fill in all the required parameters in the fields provided and click **Show Report** in the top menu of the page (Fig.40).

Fig. 40. Setting parameters for a Report on schedule compliance

Fig. 41 shows a **Report on schedule compliance**

Fig. 41 Example of a Report on schedule compliance

Use the top menu buttons of the report page to export the report into a different format: PDF, Excel 2003 and 2007, Word 2007, RTF or text. Print the entire report or a part of it or save it in **ELMA** as a web-document.

With data from schedule compliance reports, you can analyze how employees work.

Chapter 6. Activity Planning

To help employees plan their work activities, **ELMA** features the **Calendar**. Each employee has their own calendar, where they can schedule all the events, communication and due dates of their current tasks. It is also possible to create and view common calendars, but this option is available only to users with special access permissions.

In **ELMA**, an **Event** is a note about a certain activity; it can be created by any user. Specify the event's theme, date and place, as well as a list of participants and other information. If you want to record an event that has already happened, it is possible to enter a past date when creating the event.

You can export the **ELMA** calendar into:

- an iCalendar file (*.ics, iCal), which you can then open in any electronic organizer;
- an Internet calendar. In this case you to view the calendar of the current user, of a third user or a shared calendar in another software program that supports internet calendars (e.g., Microsoft Outlook and Google calendars).

In external software, **ELMA Calendars** are only accessible for viewing.

You can import one or several events from external online calendars into the **ELMA Calendar**; they will be available for viewing only.

For the **Calendar** export and import, see **ELMA Help**.

You can also use business processes to plan the company's activity.

User Calendar

The user **Calendar** shows different activities of the current user:

- regular and periodic events;
- communication with customers (e.g., a phone call, a meeting, a reminder to send an e-mail);
- the calendar also shows the tasks for which the user has set due dates.

Use the **Calendar** to schedule your work. Once it is open, you can see a full picture of your working activities throughout a certain period (a day, a week or a month). For full information, click on the activity in the calendar to open its page.

In the **Calendar** section of the **ELMA** left menu you can see all the calendars accessible to you.

By default, a user's personal calendar can be viewed by all their superiors, according to the organization structure. A user can give permission to view or edit their calendar (or even provide full access) to any other user.

With **Calendar,** you can:

- schedule events, tasks, phone calls, e-mail messages, meetings;
- view activities from any period (a day, a business week, a calendar week, a month);
- view activities in different layouts: as a table or a list;
- review and revise common calendars (if you have access permissions);
- view calendars of other users (if you have access permissions);
- set access to your own calendar for other users;
- print out activities from the calendar.
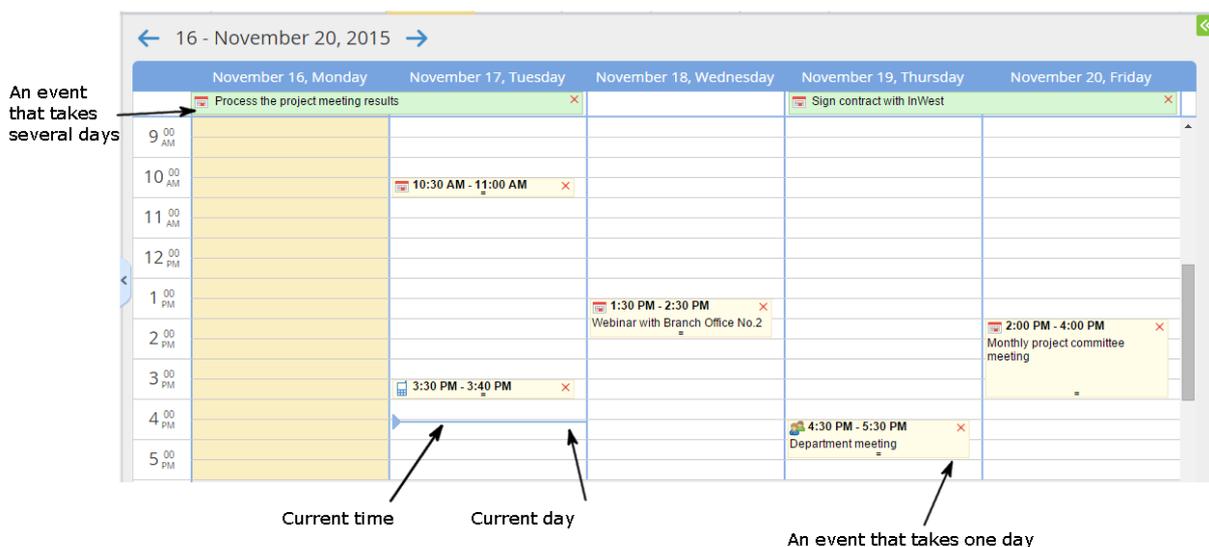
Fig. 42 User's Calendar page

To create a regular event or a communication activity, use the **Add** button (Fig. 43) in the top menu of the calendar page; or you can left-click on the desired date and time in your calendar's event field.
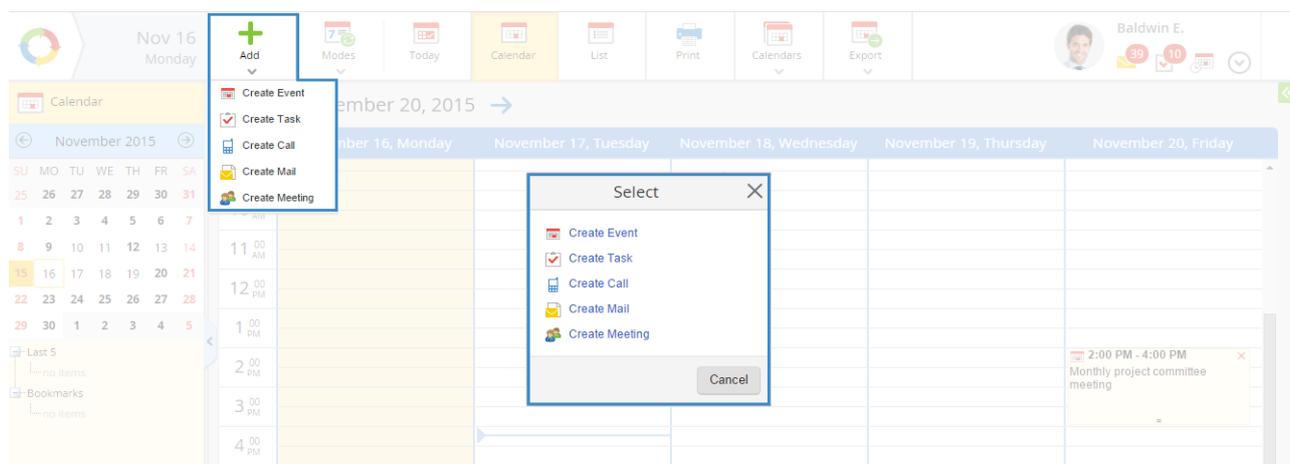
(Fig. 43) Add button and dialogue box for creating a new calendar event

Add the **Calendar** portlet to your main page to make event tracking even easier (Fig. 44). The **Calendar** portlet displays activities and scheduled tasks in chronological order starting from the current day and for a week ahead, also showing the activities outdated at the given moment. If you click on the portlet's name, you will go straight to the **Calendar** section.
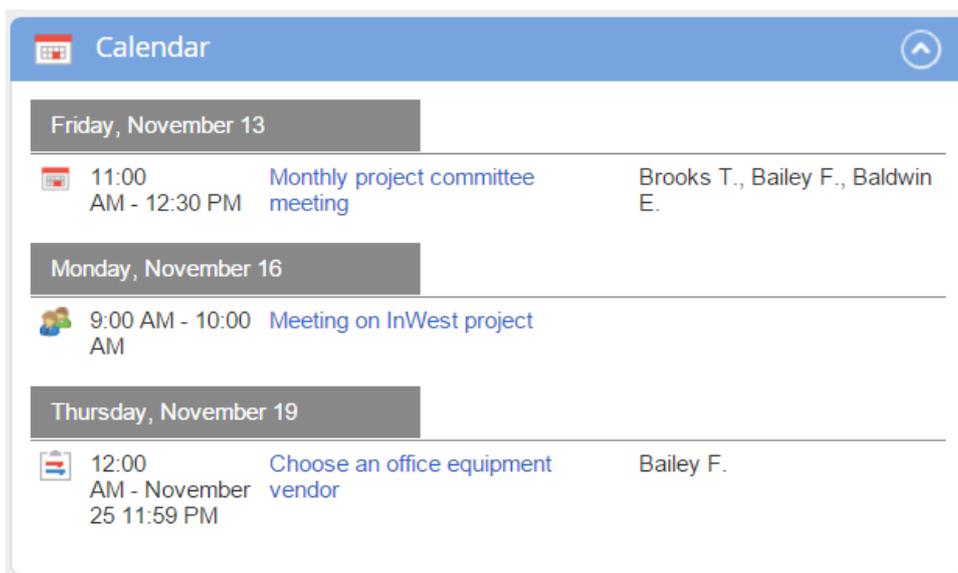
Fig. 44 Calendar portlet

By default, the user tasks are not displayed in the calendar. For the tasks to be displayed, you need to schedule them. To do so, go to the calendar page, open the planning dashboard (Fig. 45) and drag'n'drop the unplanned tasks into the activity field to a certain time. To open the planning dashboard, click the ![icon] button in the top left part of the dashboard. To close it, click the ![icon] button in the top left part of the dashboard.
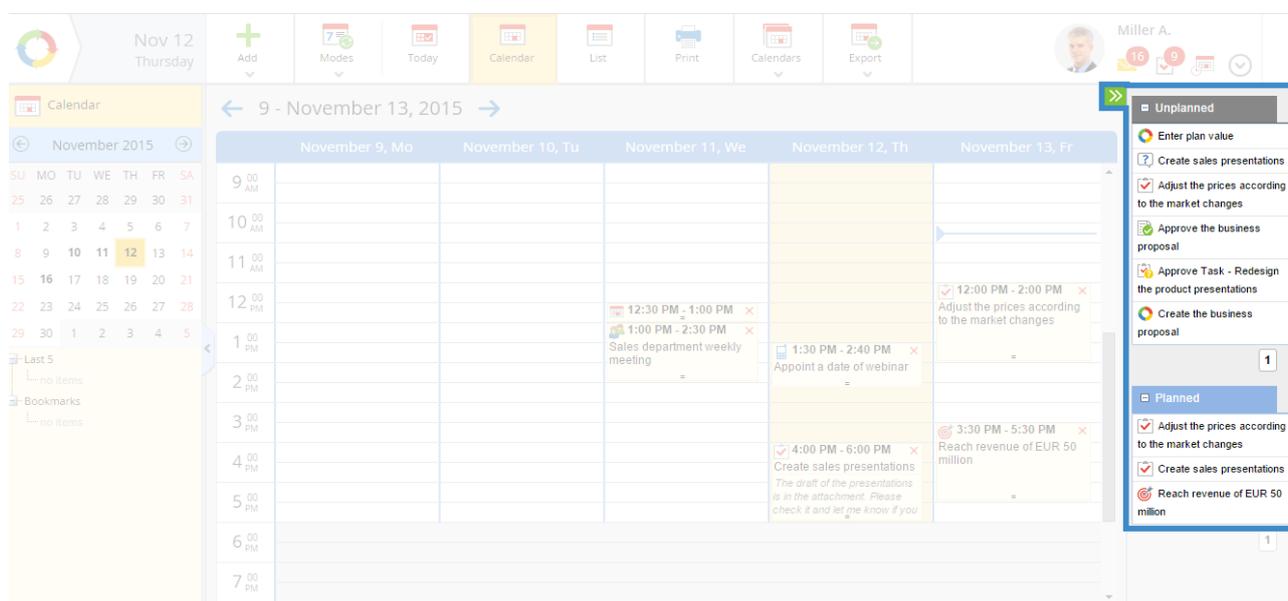
Fig. 45. Expanded task planning dashboard

You can also schedule your tasks in either subsection of the **Task List** section or in the **Tasks** portlet. To do so, click the ⚊ icon (Fig. 46), that you can see in the task's **End Date** field. A window displaying the **Calendar** page will appear. In this page, click on the required time. Then confirm the date planned by clicking **Add** in the provided window.

Fig. 46. Task planning button

Common Calendars

In a **Common Calendar,** activities are open for viewing and editing to all the system users who have corresponding access permissions.

You can use common calendars to plan your company's general resources, for example, to book time in a meeting room so that meetings do not overlap. Since the calendar shows all the planned events, it is always clear at what time the meeting room is available.

The calendars and their access permissions are set up by the administrator in **Administration → Basic Applications → Common Calendars** (Fig. 47). The number of common calendars is not limited.
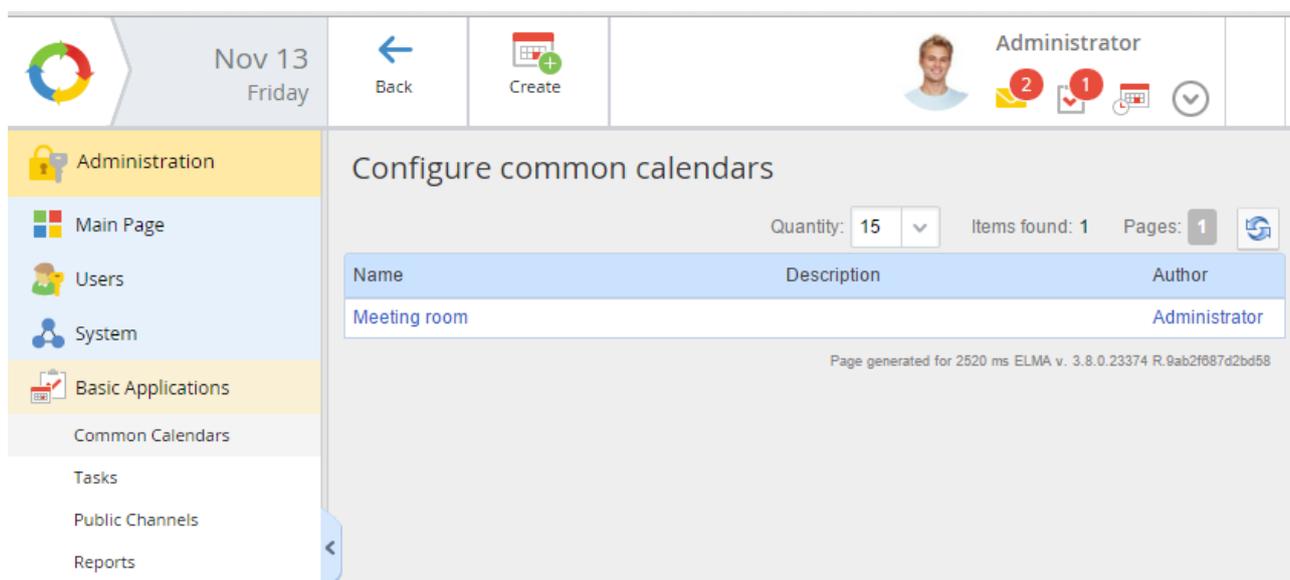
Fig. 47 Administration → Basic Applications → Common Calendars

To create a common calendar, click **Create** in the top menu of the section. A dialogue box will appear (Fig. 48), fill in all the required fields and click **Create** for confirmation.

Fig. 48 Create Common Calendar dialogue box

Then configure the common calendar's settings. To go to the calendar's page (Fig. 49) nd manage its setting, click on its name in the list of common calendars. To set access permissions, go to the **Permissions** tab and **Add** users or groups to the list and assign their access permissions.
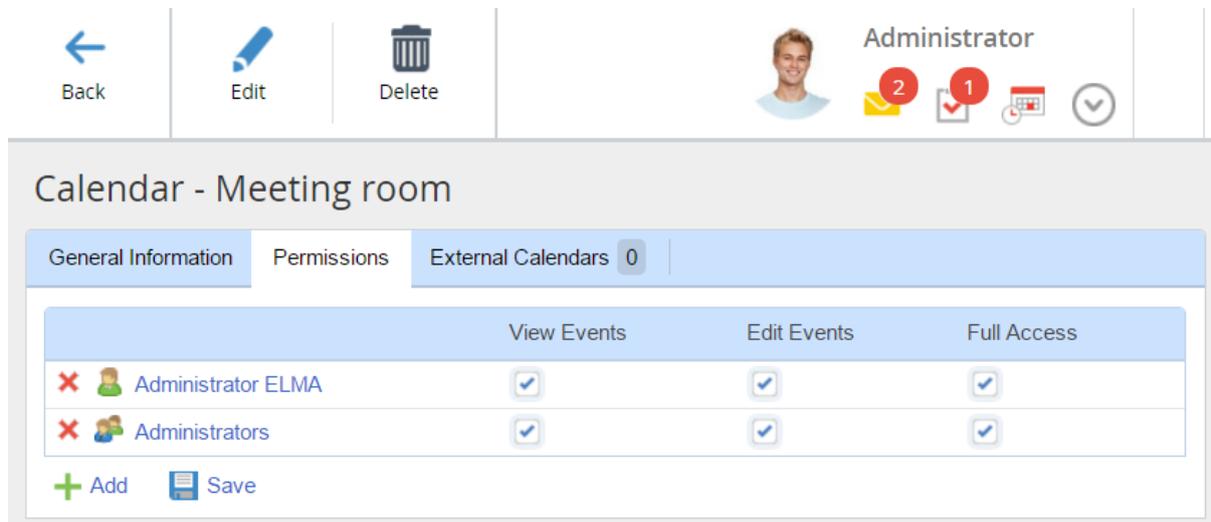
Fig. 49. Common calendar page. Permissions tab

There are three levels of access to a common calendar:

- **View events** - Gives access to view events in the calendar. Editing is not allowed.
- **Edit events** - Gives access to add and change calendar events. When this checkbox is selected, the "View Events" checkbox (and respective access permissions) is selected automatically.
- **Full access** - Gives full access including managing access permissions to the calendar. The "View events" and "Edit events" checkboxes are selected automatically.

You can add several calendars to the **External Calendars** tab; **ELMA Calendar** will automatically display their events.

To view the common calendars accessible to you, go to the **Calendar** section and click **Calendars** in the top menu of the page. You will see a list of common and private calendars accessible to you (at least at the **View Event** level). Now choose the calendar that you wish to view.
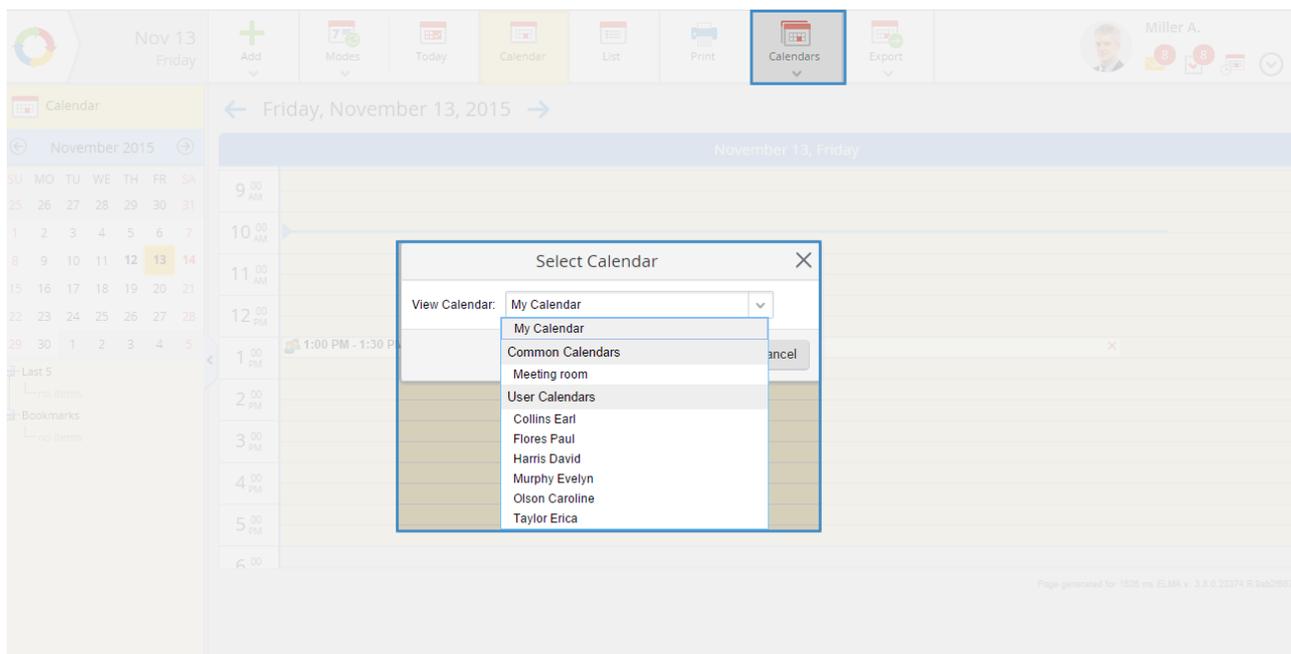
Fig. 50. Select a Calendar to view

You can create an event from the calendar's page, from the **ELMA Web Application** main page or from the main menu. To create it from the main page or the main menu, click **Create Event**; the event page will appear. To create it from the calendar's top menu, click **Common Calendars** (Fig.51). Below the event dates you will see a list of accessible calendars, select the one that you need.
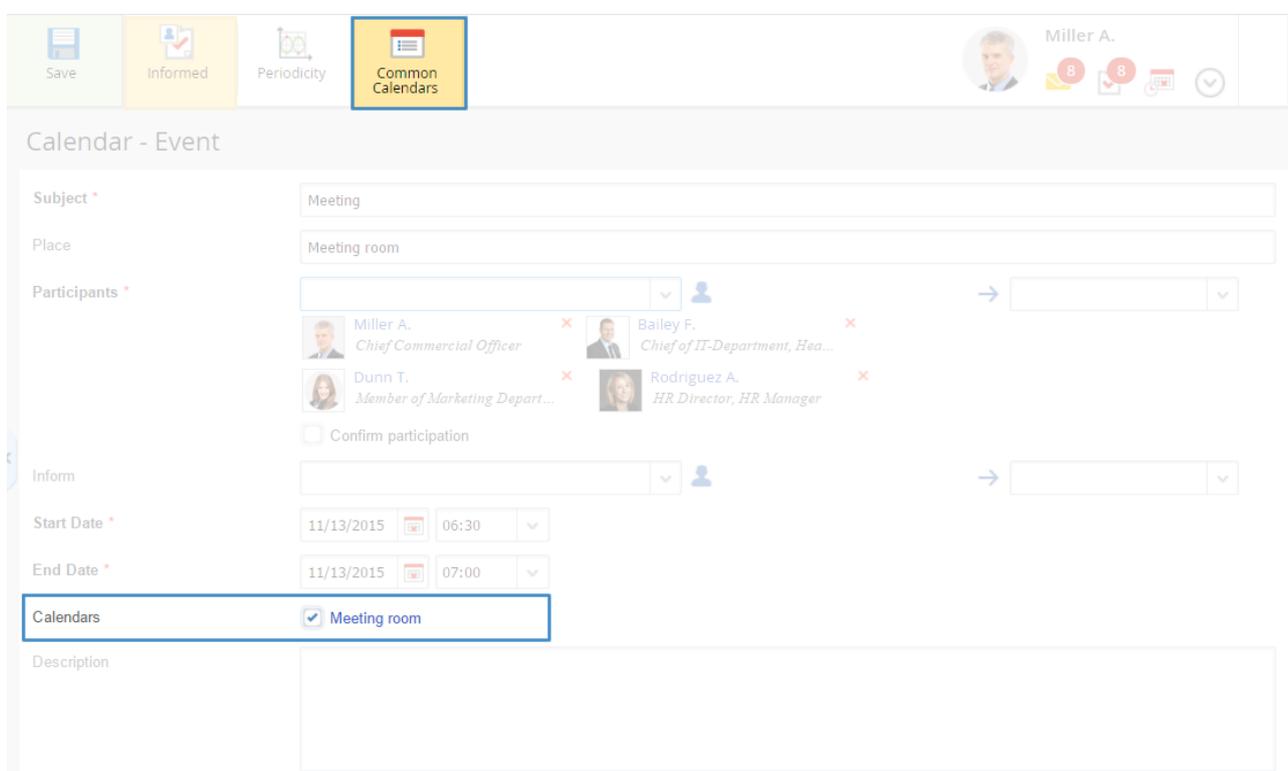
Fig. 51. Creating an event in the current Calendar

Once you have saved the event, it will appear in the selected common calendar and in the private calendar of each participant.

If your event overlaps in time and/or place with another event already created, you will see a window displaying information about it (Fig. 52).
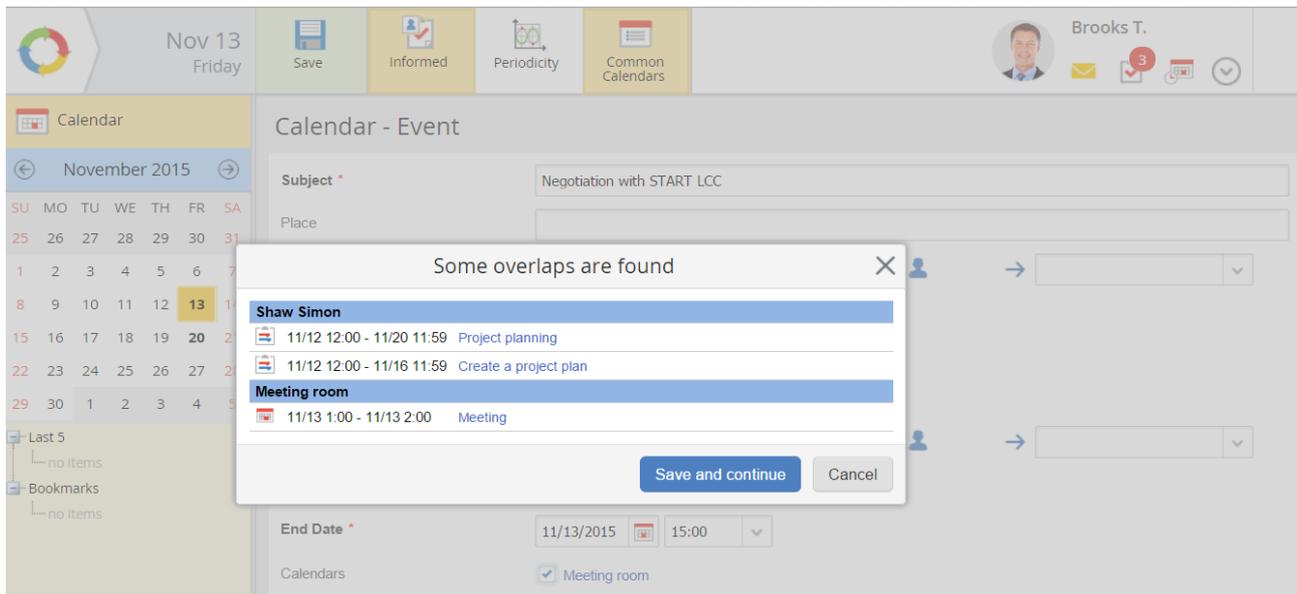
Fig. 52. Notification about overlaps found

To open that overlapping event in a new tab of your browser, click on its name.

If you click on **Save and continue**, the event that you created will be saved for the time specified. The **Calendar** will show that events are overlapping. To cancel and go back to the creation page, click on **Cancel**.

The author of the other event is notified, but cannot forbid you to create an overlapping event.

Examples of Business Processes

You can use business processes to schedule activities within your company. In this chapter, you will see two business processes that allow to schedule common events and resources. We shall concentrate on the process logic instead of the process creation technology. For business process modeling, see the **ELMA BPM Platform quick-start manual**, for document flow in business processes see the **ELMA ECM+ quick-start manual**. All this information is also available in **ELMA Help**.

The first business process is "Organization of meetings".

First, let us see how to organize a meeting and prepare the minutes of meeting without using an information system.

The initiator (or their secretary) notifies all the participants about the date, time, place and theme of the meeting, by means of a phone call and/or e-mail message. At set time, all the participants gather in the meeting room. The meeting secretary prepares the minutes of meeting and send it for approval to all the participants. If necessary, they make corrections to the document and it is sent for approval again. Once approved, the minutes are handed for signature to the head of meeting. Then, the signed original is scanned and send for acquaintance to all the participants and interested employees. The original document is filed in the minutes of meeting folder.

During the meeting, certain issues have been discussed and managed: decisions, tasks, assignment of responsible persons.

Now, let us see how this can all be done with a business process in **ELMA**.

In Fig. 53, you can see a map of the "Organize Meeting" business process.
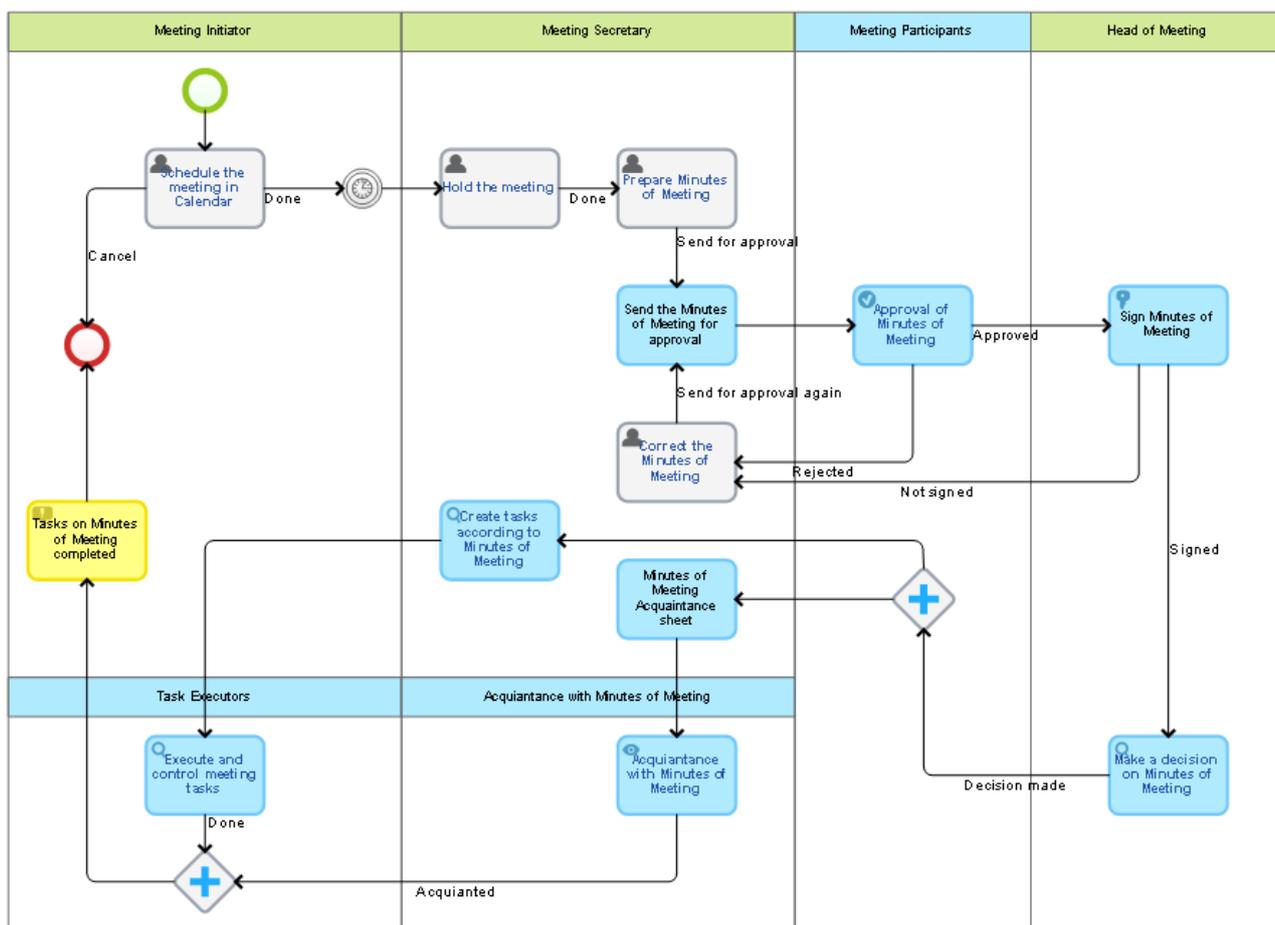
Fig. 53 "Organize Meeting" business process map

Any of the executives (or their secretary) can start this process in the **ELMA Web Application**. The first task for the process initiator is to schedule the meeting in a common calendar and specify the theme, the secretary, head of meeting and participants. Then the process can be suspended with a timer until the very date of the meeting.

Then the head of meeting holds the meeting and prepares the minutes of meeting – creates a document in **ELMA** and attaches a version (file). The Minutes are sent to all the participants. If the document is not approved, the secretary receives the document back for correction. Once approved, the document is sent to the head of meeting, who signs it and makes a decision on it.

The meeting secretary receives two simultaneous tasks:

- to form tasks according to the minutes of meeting and the decision made;
- to make a list of users who must review the minutes of meeting.

Every user from this list is then assigned with the task to review the document. At the same time, employees receive tasks according to the minutes of meeting, and start working on them.

When everyone has completed their tasks according to the document, the process initiator is notified that the work on the minutes of meeting is done. The process itself is complete.

This process is easily modeled and does not take a lot of time. You can improve it by adding scripts, e.g., to automatically create and complete events in the calendar or create minutes of meeting from a template. You can limit the time allowed for acquaintance, signing and approving documents, and set up task escalation after a certain time.

A business process allows you to organize a meeting, coordinate, sign and fulfill the minutes of meeting according to one scheme. You do not have to use original paper documents. All the minutes of meeting are stored in **ELMA** so you can track completion and verify active tasks at any moment. You can also turn all the paperwork into electronic documentation. This will make your employees' work more organized and productive.

Here is another example of a business process that facilitates scheduling resources: "Request for a bus". Let us say that a certain company has a Transport Department. This Department has several buses; and other departments and divisions make requests to use these buses for business purposes. If an employee wants to order a bus, he or she has to fill in a paper form, get a sign off by their superior and then give it to the Head of Transport Department. The Head of Transport Department considers the request and can either approve or reject it if, for example, there is no bus available for that date. If the employee decides to change the date, they have to fill in a new form, get a sign off and so on.

You can see an example of this business process in Fig. 54.

The request initiator starts a process and fills in all the information: date, time, departure point, purpose, number of passengers, etc. **ELMA** features a calendar available to all users, which only the operator or Head of Transport Department can edit. It is possible to create a periodical event: for example, if you want to bring employees to work every morning, it is better to book this time right away. Before sending the request, you can check the timetable to see if the bus is available at the desired time.
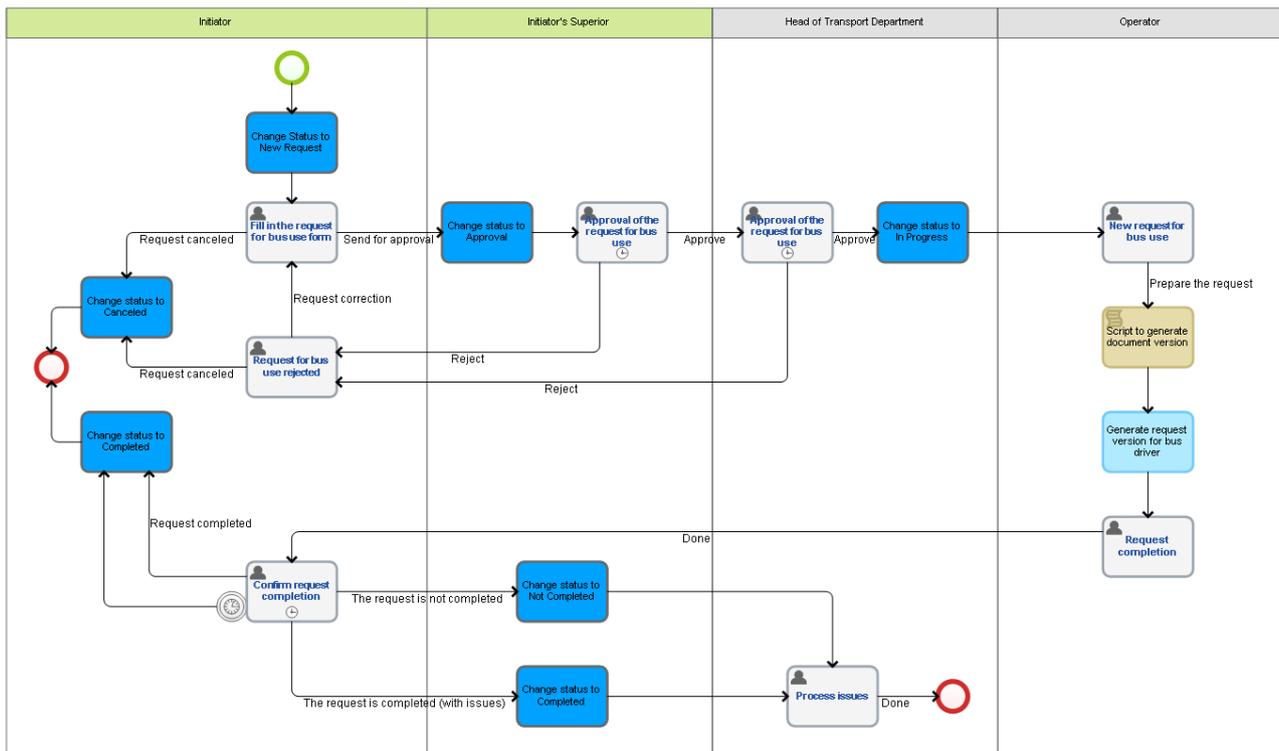
Fig. 54 "Request for Bus Use" business process map

Then the request goes to your superior for approval. They can see all the information included in the request. The superior can make a comment and approve or reject the request, the same as the Head of Transport Department. If the request is rejected, you can correct it according to the comments made, or cancel it.

If the request is approved, it is sent to the Operator, who confirms that the request can be fulfilled and adds information for the driver. A new version of the request is made. The operator prints it out, attaches other required documents and hands it to the driver.

When the request is complete, the initiator must confirm it or notify the Head of Transport Department about any issues. The "Conform request completion" task features a task timer and escalation. That means that if during, say, three days the initiator does not complete this task, the task is considered completed unconditionally. If the request has not been fulfilled, the superior will be assigned with a task to review this issue.

The business process features certain statuses that allow to track the request. The initiator can track their request in the process display, where the Head of Transport Department and the operator see information about all the active processes. It is recommended that the operator places a portlet with all active process instances on the main page. To name tasks, use templates. In a template you can enter all the key information such as date and time, to make it easier to work with. You can improve the process by using scripts, for example, to

verify any event overlays in common calendars or to limit available dates (e.g., a request cannot be made later that 2 days before the required date).

A common calendar is very convenient for this business process and for scheduling the bus timetable. It increases the quality of services provided and allows to schedule availability, making it easy to track issues and receive information about requests (both processed and active). All this makes the process a lot faster.

Chapter 7. Time Report and Monitoring

ELMA provides tools to monitor and report the time spent on completing tasks.

At the end of a period (a day, week or month) each user fills in a report, specifying what tasks they have completed and how much time they have spent on them. Then the report is sent for approval to the person who assigned the tasks. The approver can either approve or reject it. At the end, there is a number of approved hours that can be used to calculate the employee's pay.

You can limit the time report feature for just several employees. It is not always applicable, but is useful in the following cases:

- If the salary is based on time (time and materials)
- If you want to make a report on work activity (since the time report is tied to tasks that are completed)
- If you want to see the amount of resources spent on a certain task.

Since an employee might have several tasks at one time (and they cannot work on all of them simultaneously), there might be a significant difference between the time estimated by the system and the time actually spent on the task. That is why the actual time report is submitted by the employees themselves, while the task author verifies the report.

To report the time spent on a task, use the **Time Report** subsection of the **Tasks** section (Fig. 55). It is divided in two parts: **Reports** and **Approval**.

The **Reports** page shows all the time reported by a user and/or their employees. There are several filters by categories. The reports that are currently *pending approval* can be edited or deleted. This page also allows to submit a time report.

The **Approval** page shows information about all the time reports pending approval by the current user. By default, the task/activity author is specified as the approver. On this page, you can view a time report or an activity, ask a question, and reassign time report approval to another user.

Fig. 55. Tasks → Time Report → Reports section

In Fig. 55 you can see a summary table of all types of activities. Is shows a total number of the time reported, divided by statuses: *Pending Approval, Approved, Rejected.* You can group the data by occupation or by executor. To do so, click **By Occupation** or **By executor** in the top menu.

Configure the Time Report Module

The **Time Report** feature is configured by the administrator:

- Specify the main parameters;
- Set access permission for time report control;
- Specify the list of objects that are used in time reports;
- Fill in the **Occupation** entity, which groups the time reports.

To configure the main time report settings, go to **Administrating → Basic Applications → Tasks → Tasks Settings** and find **Time Report** (Fig. 56).

Fig. 56. Task Settings module, Timer Report section

The **Time Report** section contains several option buttons that you can use to configure the time report settings for your company. Fig. 56 shows default settings. To change them, just click ✏.

Description of the settings section:

- **Allow to create time reports** – Activate the time report function in ELMA.
- **Require a comment when rejecting a time report** – Give a reason when rejecting a time report.
- **Add time report limits** – You cannot submit more hours than specified in the time report limit.
- **Send notifications about new approval tasks** – Approver receives a notification in their **Messages** feed about a time report submitted for approval.

- **Send notifications about approval results** – Person who submitted the time report is notified about the approval results in their **Messages** feed.
- **Notify when time reports are edited** – Person submitting the report and the approver are notified in their **Message** feeds about any changes made to the submitted time report.
- **Number of items in time report per day** – Default number of fields available in a time report per each day.

When the basic settings are configured, you need to set access permissions for time report control. Go to **Administration → Users → Access Settings → Global Access Settings** and find the **Tasks** section (Fig. 57).
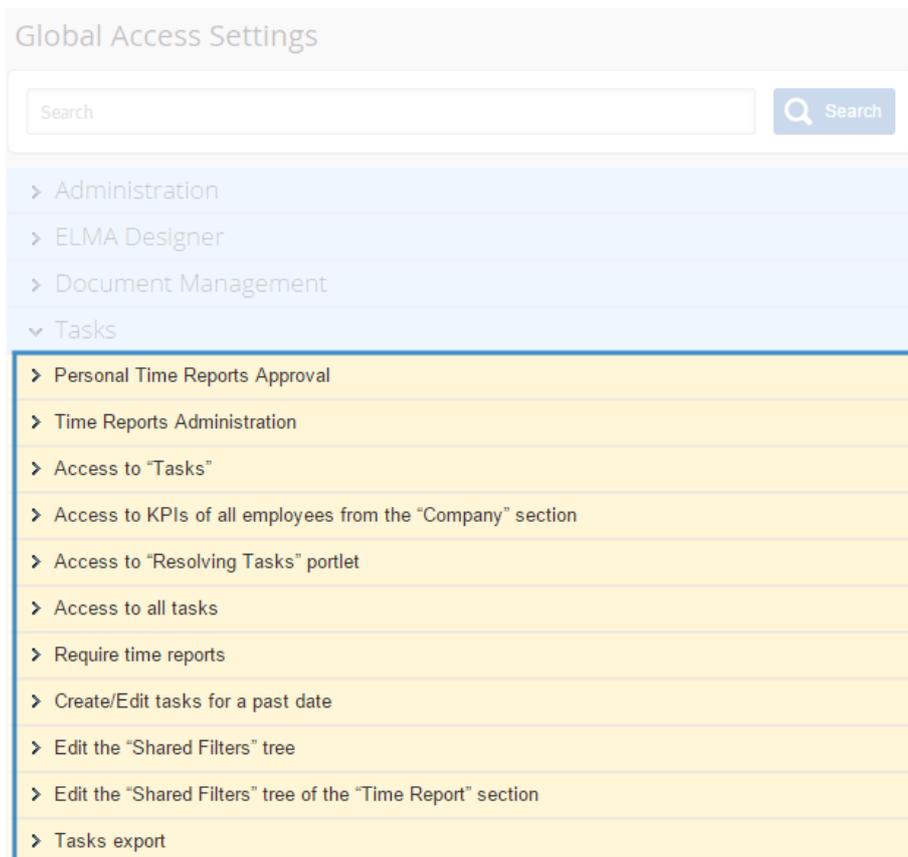
Fig. 57. Global Access Settings → Tasks

The **Tasks** section provides the following permissions for time reports:

- **Personal Time Reports Approval** – Specifies groups of users who can approve their own time reports.
- **Time Reports Administration** – Specifies groups of users who have full access to all the time reports in **ELMA**. When they open their **Time Reports → Reports** section, the **All** filter shows them the reports of all employees. They can manage these reports in any way and reject their approval.

- **Require time reports** – Specifies groups of users who are obliged to submit a time report when accomplishing a task. They cannot mark a task as completed until they submit a time report on this task.

ELMA features default groups of users who are allowed to manage time reports. This means that if you want to give corresponding permissions to certain users, you can simply add them to these groups.

After configuring the settings, select the time report object.

Time Report Objects

Time Report Objects are types of system objects on which employees submit their time reports, such as calendar events and tasks. The system administrator can set the time report objects in **Administration → Basic Application → Tasks → Time Report Objects** (Fig. 58)
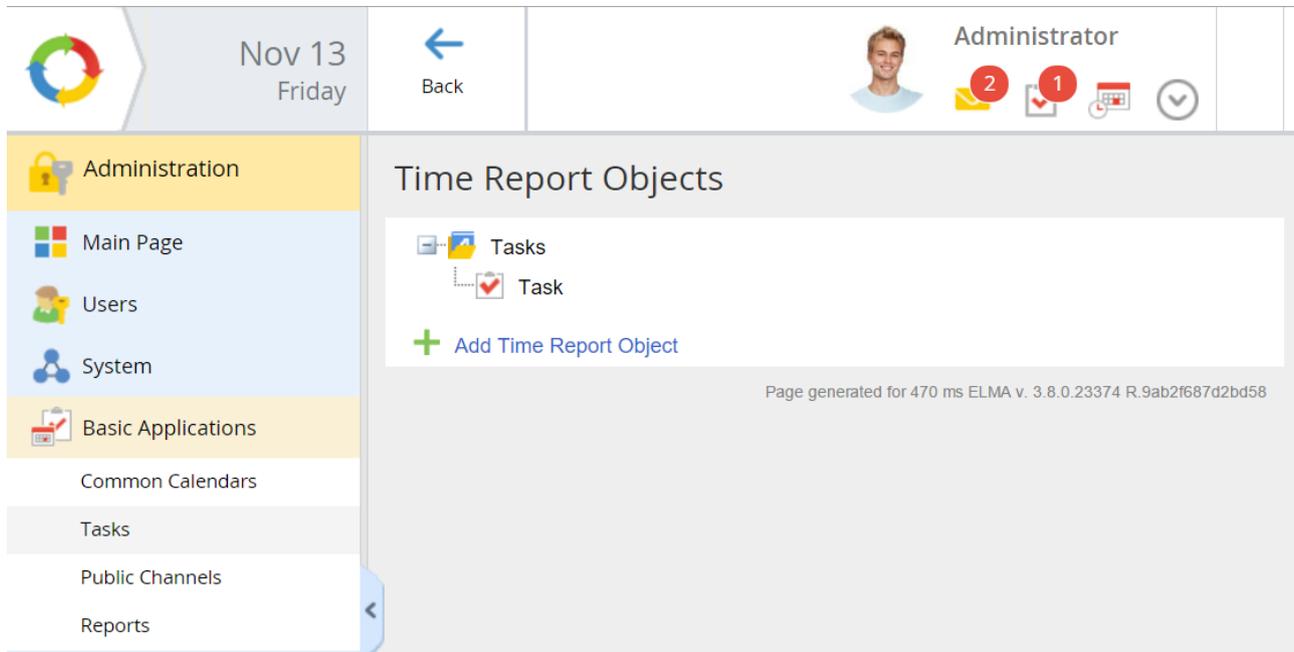
Fig. 58. Time Report Objects section

Numerous **ELMA** objects can be included as time report objects but, by default, only user tasks are included (as in Fig. 58). You can expand this list and add new types of tasks (for business processes, projects, documents and so on), events, meetings and other objects that are managed within the **ELMA** system.

To add an object to the list, click **Add time report object**. You will see the **Add Time Report Objects** form (Fig. 59). Select the object that you want to add and click on **Add**. To go back to the Time Report Object section without saving changes click **Cancel**.

If you want to delete a time report object from the list, place the mouse over the object name and click the ✖ icon. The system administrator can add and delete time report objects at any time.
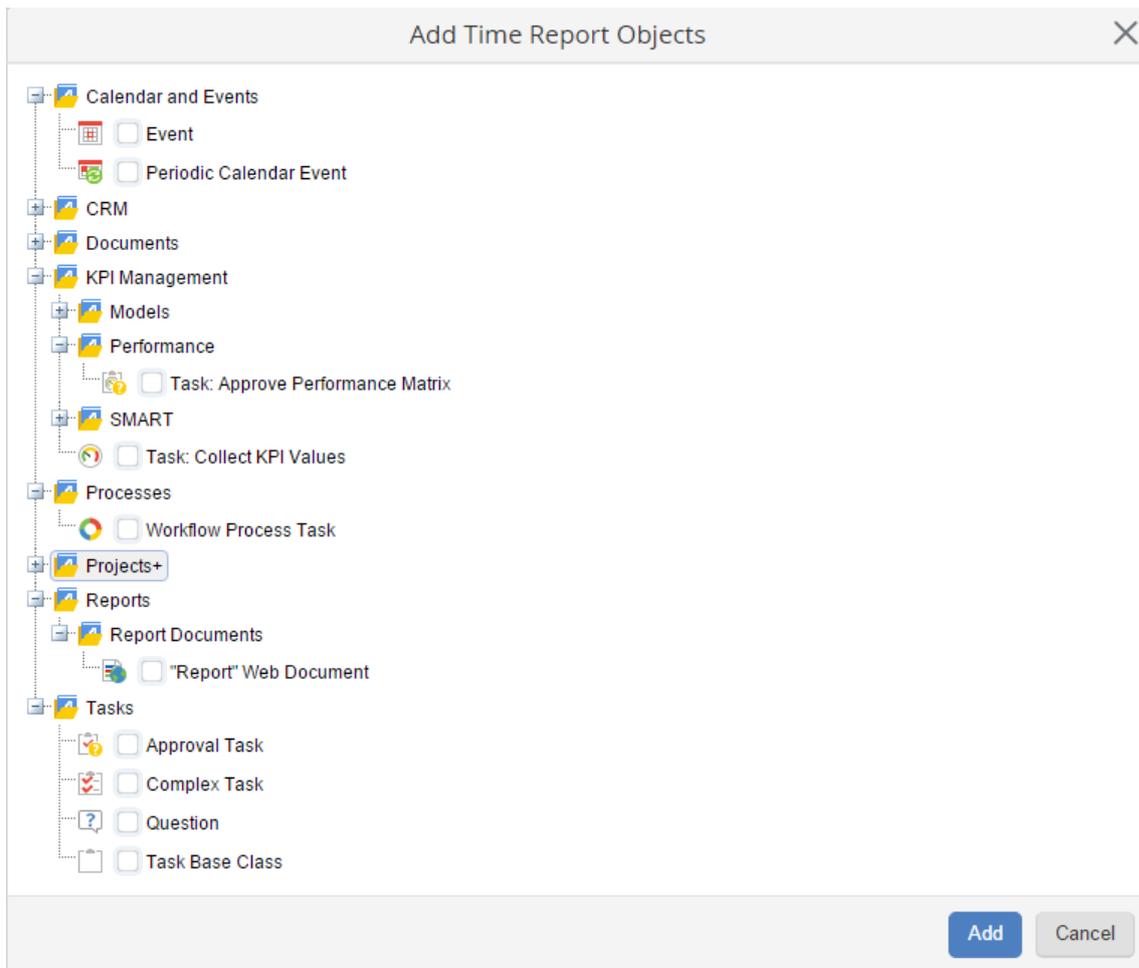
Fig. 59. Add Timer Report Objects form

Once the time report objects are added, users can submit reports on them.

The next step is specifying types of occupation.

Occupation

You can group time reports by occupation. This allows you to evaluate the effective workload and organize it according to the company's development directions. The list of occupations is formed in the **Occupation** entity (Fig. 60). You can open the entity from **Administration → Basic application → Tasks** of from the **Task** sections of the **Entities**. By default, this entity is left blank.
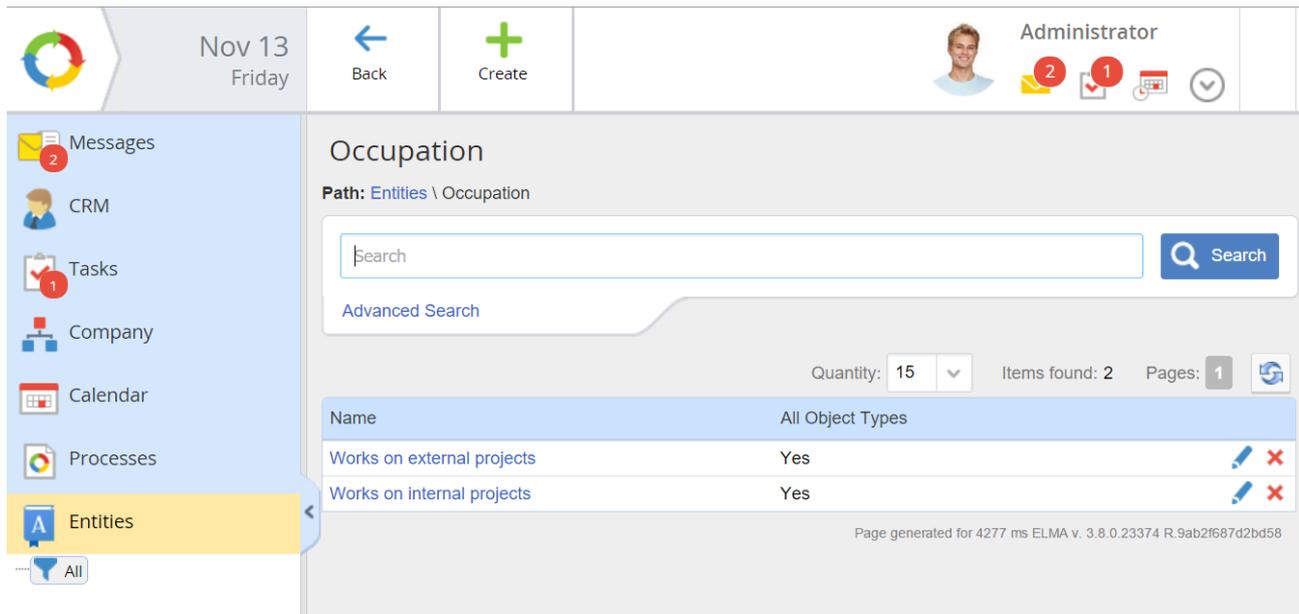
Fig. 60. Occupation entity

The occupation must always specified in time reports, and the reports are divided by occupation. It is important for staff performance analysis, or if billable hours are paid according to occupation.

To create a new type of activity, click **Create** in the top menu, then fill in the form. Enter a name, and specify if the time report objects for this occupation are limited (Fig. 61).

For each occupation type, you can limit the time report objects. Set the **All Object Types** option to **No** and select those time report objects that are available for this type of occupation (Fig. 61). To select an object, click **Add Object Type** and select the checkboxes of the desired objects. To save, click **Select**.

To save the **Occupation** entity, click the **Save** button in the top menu of the creation form. The **Occupation** entity items can be deleted or edited.
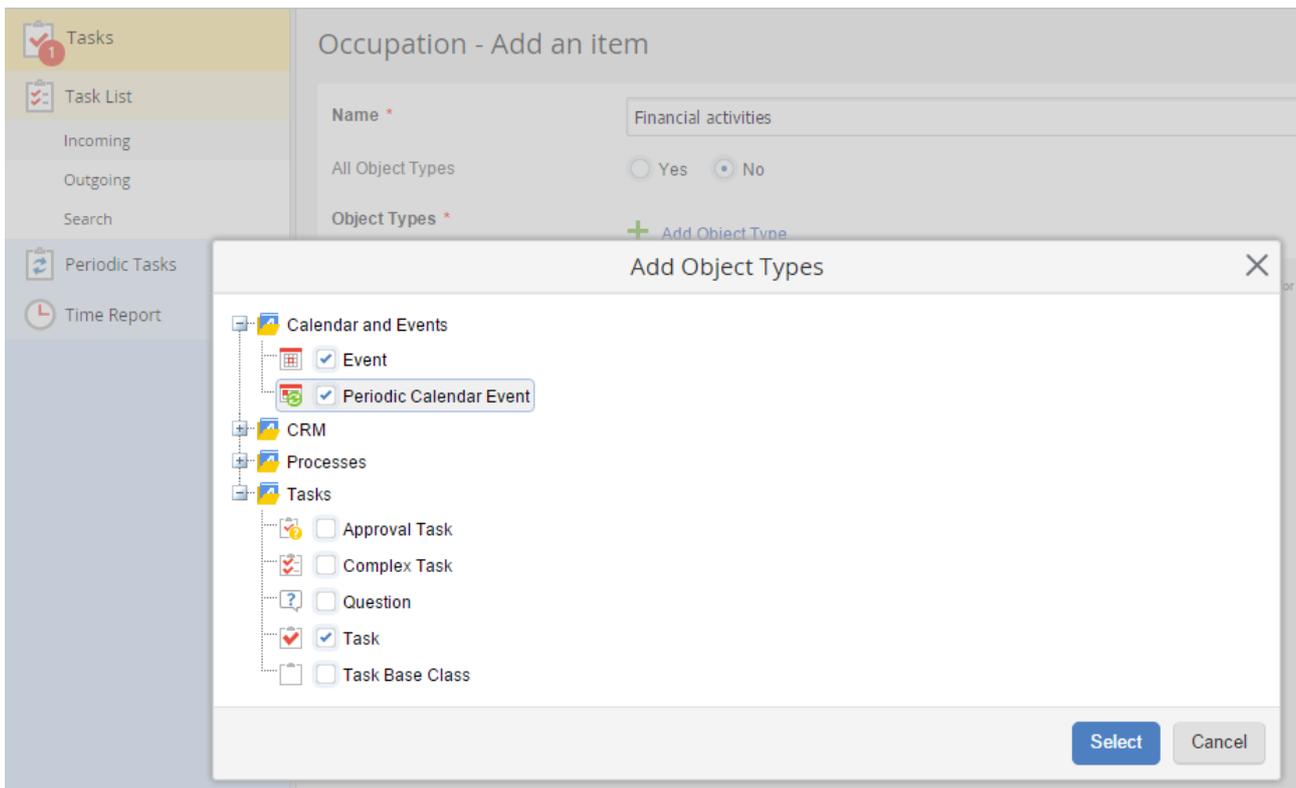
Fig. 61. Adding objects to the Occupation entity

If time report objects for this occupation type are not specified, then it is possible to submit time reports for all accessible object.

After you configure all the settings, the time report module is ready for work. In the following chapter, you will learn to add time reports for your tasks and to submit reports for approval.

Adding Time Report for Tasks

ELMA allows you to add a time report for a task that you are currently working on or that you have already accomplished. Submitting time reports is only possible for those objects that are selected by that moment.

To add a time report for a current or completed task, press the **Actions** button and select **Add Time Report Item** in the drop-down menu (Fig. 62). You will see the **Time Report** form where you have to specify the amount of time spent, the timeline (days and/or hours and/or minutes) and the date. You can also make a comment to describe the work accomplished. Then click the **Add** button.
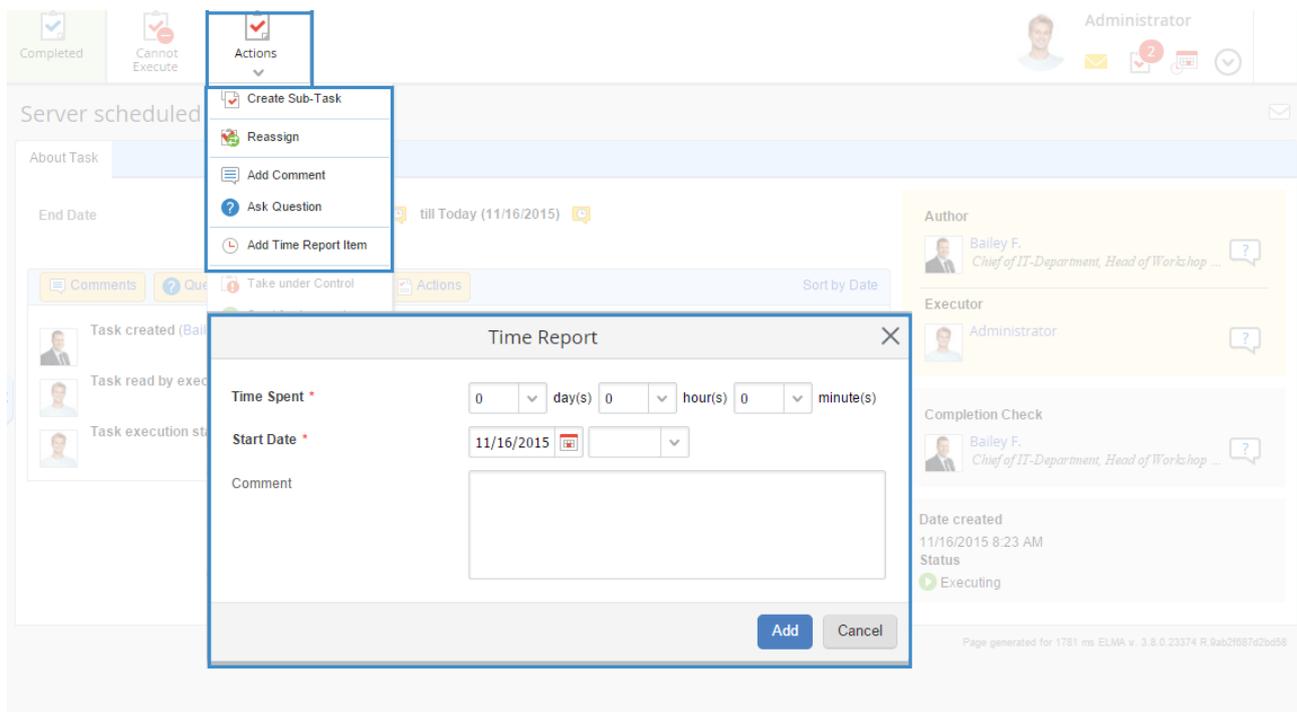
Fig. 62. Adding a time report to a task

All the added time reports are stored in the **Time Report Log** on the page of each task (**Time Report Log** tab, Fig. 63). If there is no time report for the task, then there is no **Time Report Log** on its page.

When a user submits a time report, all the new data from **Time Report Logs** is automatically included and sent for approval.
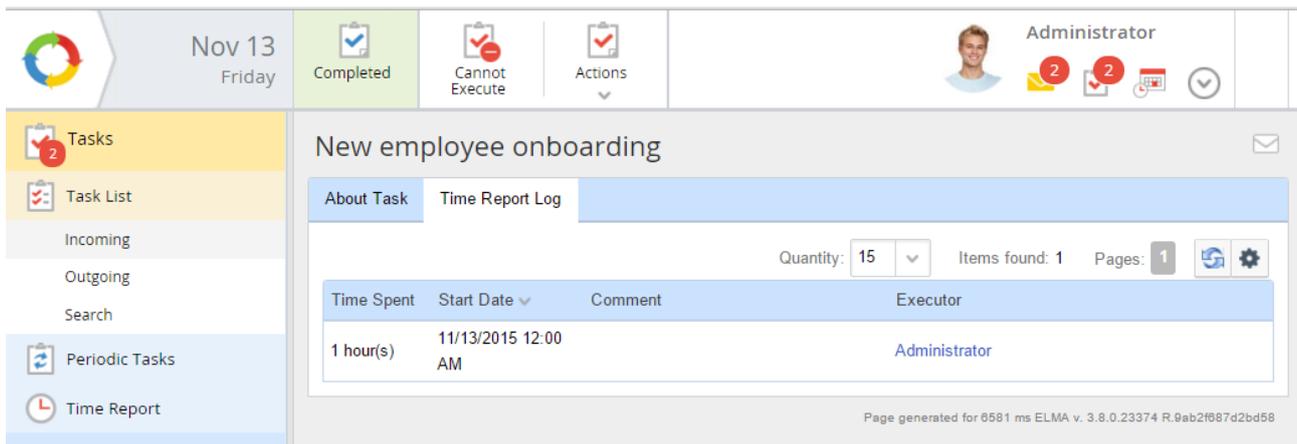
Fig. 63. Time Report Log tab

There is another way to add a time report: once you have completed a task (except for business process tasks), click **Completed** in the top menu, and then add a time report in the pop-up window. To do so, open the **Time Report** dashboard in the **Completed** window and specify the date and time spent (Fig. 64).
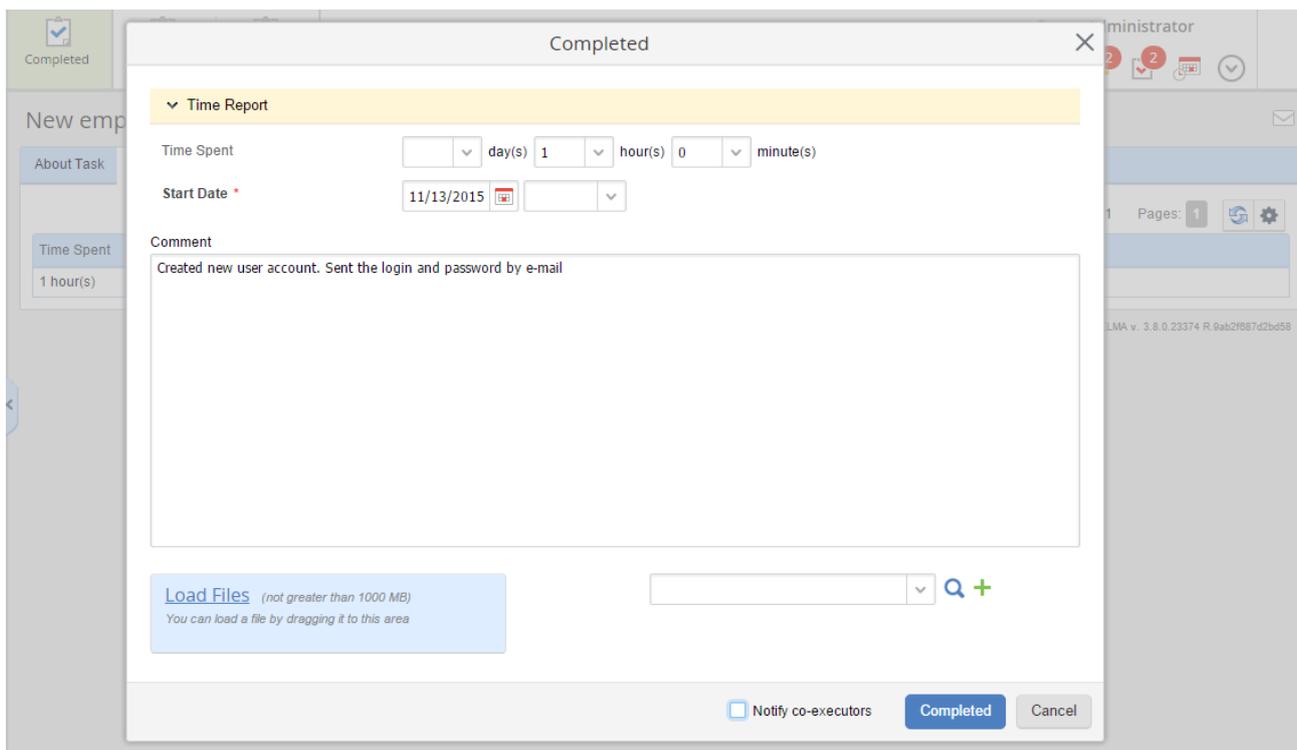
Fig. 64. Making a time report when having completed a task

The time reports added this way are also logged and submitted for approval.

When you are assigned with a task, you can add a time report at the same time, and it can only be done once. Whereas you can add various time reports while you work on the task or when the task is completed.

You can set a time report limit for a task (Fig. 65). Go to the task creation page and press **Time Report Limit** in its top menu. You will see a new filed, **Time Report Limit**. Specify the time limits (Fig. 65). The executor will see this estimated time report in the task page.

Fig. 65. Time Report Limit for a task

You can also set a time report limit for business process tasks; it is set when a process is modeled in **ELMA Designer** (see **ELMA Help**).

These tasks do not allow you to submit a time report for approval if it exceeds the estimated time input. There will be a comment in red on the time report page saying that the time limit is exceeded.

Such a report can be processed in different ways; it depends on the **Add time report limits** option button in the **Time Report** section of **Administration → Basic Applications → Tasks → Task settings**. If it is set to **No**, the system will simply notify the user that they have exceeded the limit, and will still allow you to submit the report for approval. If it is set to **Yes**, submitting such a report for approval will be impossible.

Submitting a Time Report

If a user has to track the time that they spend on a task, they add time reports to all the tasks that they work on during the day. All the reports are stored in the time report logs. Once a week or once a month, according to the company's policies, employees submit these time reports for approval. Time reports are usually approved by the task authors.

There are several ways to submit a time report:

- Click the **Time Report** button in the top menu of either page in the **Tasks – Task List** section;
- Click the **Time Report** button in the top menu of either page in the **Time Report – Reports** section (Fig. 66);
- In the main menu, click **Time Report.** To open the main menu move your mouse pointer over the **ELMA** logo in the top-left corner of the main page and wait until the blue button appears. This button opens the main menu (Fig.67).

Fig. 66. Time Report creation button

Fig.
3.
Time

Fig.67 Main Menu. Report creation button

Once you do it, a report page for the current week will appear. All the time reported during the week will be displayed (Fig. 68). Any changes that you make in the time report are saved automatically. You can report the time report that you have not reported previously, just select the corresponding week.

If you want to submit a time report for a week other than current, click **Select Week** in the upper menu; then chose the required day and click **Select**.

Fig. 68. Time Report creation page

Here you can add or edit the amount of hours and delete time reports.

To open and close the time report list for a certain day, click on the day that you need.

To add a time report you have to do the following:

1. Chose the day that you want to report.

2. Specify the time report object in the **Occupation** field. There are several ways to select **Occupation**:

- Select it in the drop-down list (only recent activities will be available);
- The 🔍 icon will open a window with time report object (Fig. 68), you can search for tasks over any period;
- Create a new task with the 📋 icon (Fig. 68).

Fig. 69. Time report object selection window

Fig. 70. Time report object selection window. Create Task tab

When a time report object is selected, it is added to the report. Click **change** on the right of the approver's name to change the approver (Fig. 71). By default, the approver is the activity author.
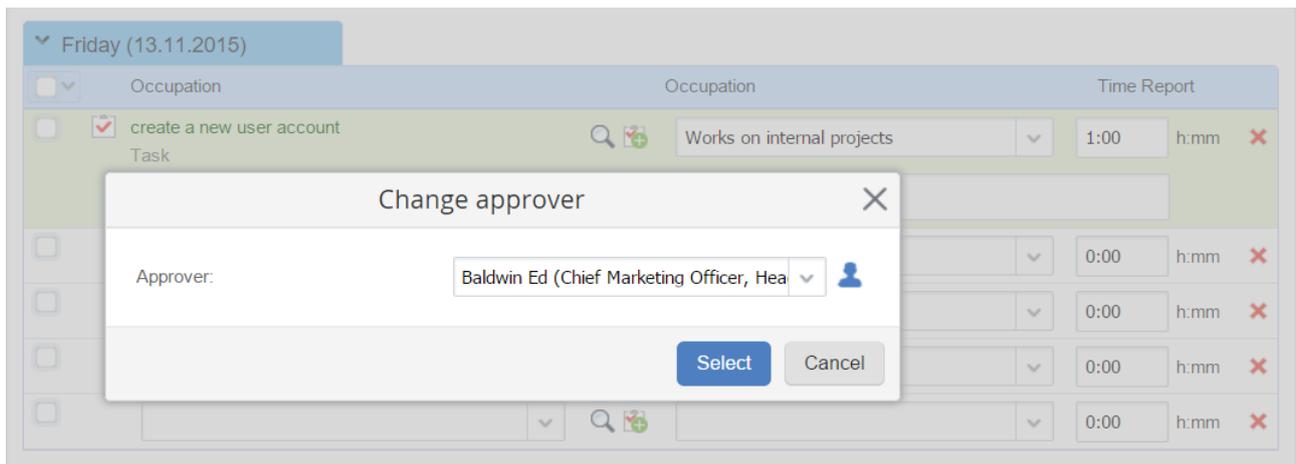
Fig. 71. Changing Time Report approver

3. In the **Occupation** field, choose an item from the **Occupation** entity in the drop-down list (Fig. 72).

4. In the **Time Report** field, enter the time spent on the task.

Time reports can be managed in groups. You can assign approvers, delete and specify occupation for several time reports at the same time. For that, select the reports by ticking the checkbox on their left, then click **Selected** in the top menu and choose the action that you want to perform. Then click **Select** (Fig. 72).
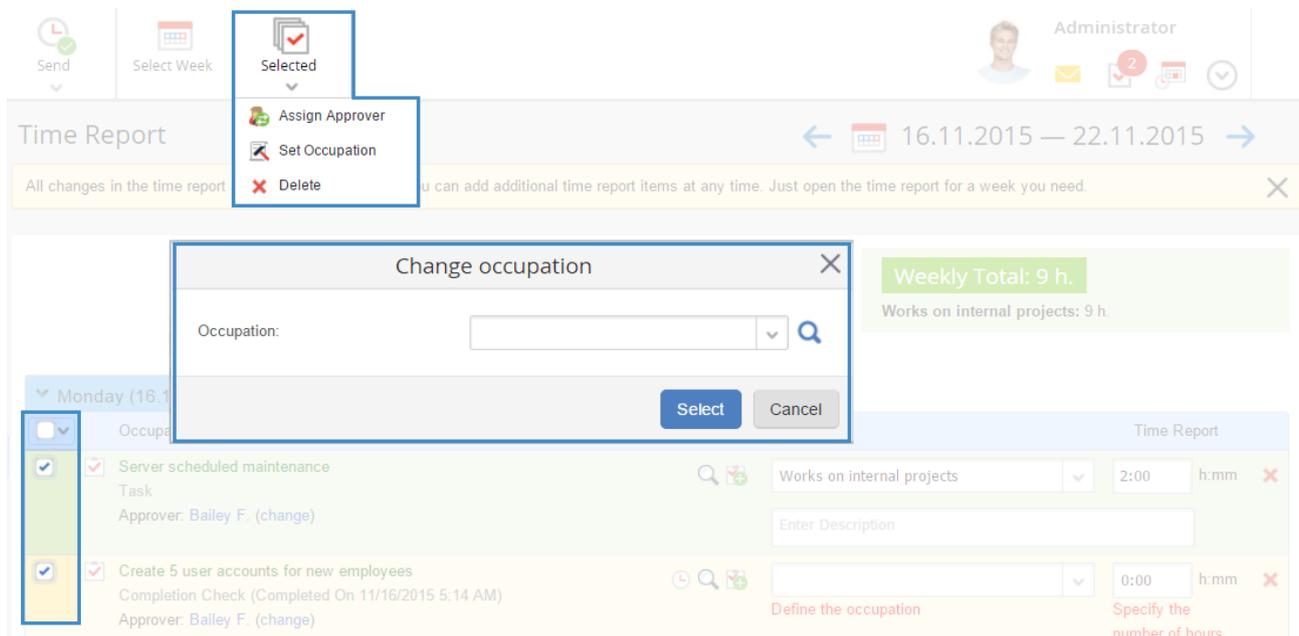
Fig. 72. Selected button. Changing occupation type for a time report.

When the report is filled, send it for approval: click **Send**. If you want to send only selected reports, click **Send Selected Items** in the **Send** button's drop-down list (Fig.73).
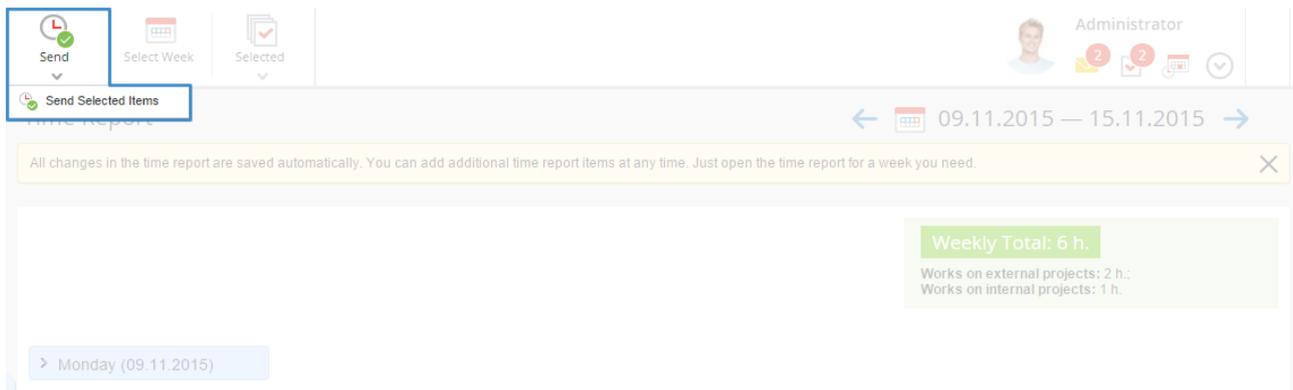
Fig. 73. Buttons for sending a time report for approval

If there are any errors in the report (for example, the occupation is not specified, or you are specified as the approver while you do not have access to approve your own time report), you will see an error notification (Fig. 74); the report will not be sent. Correct all the errors and submit the report again.
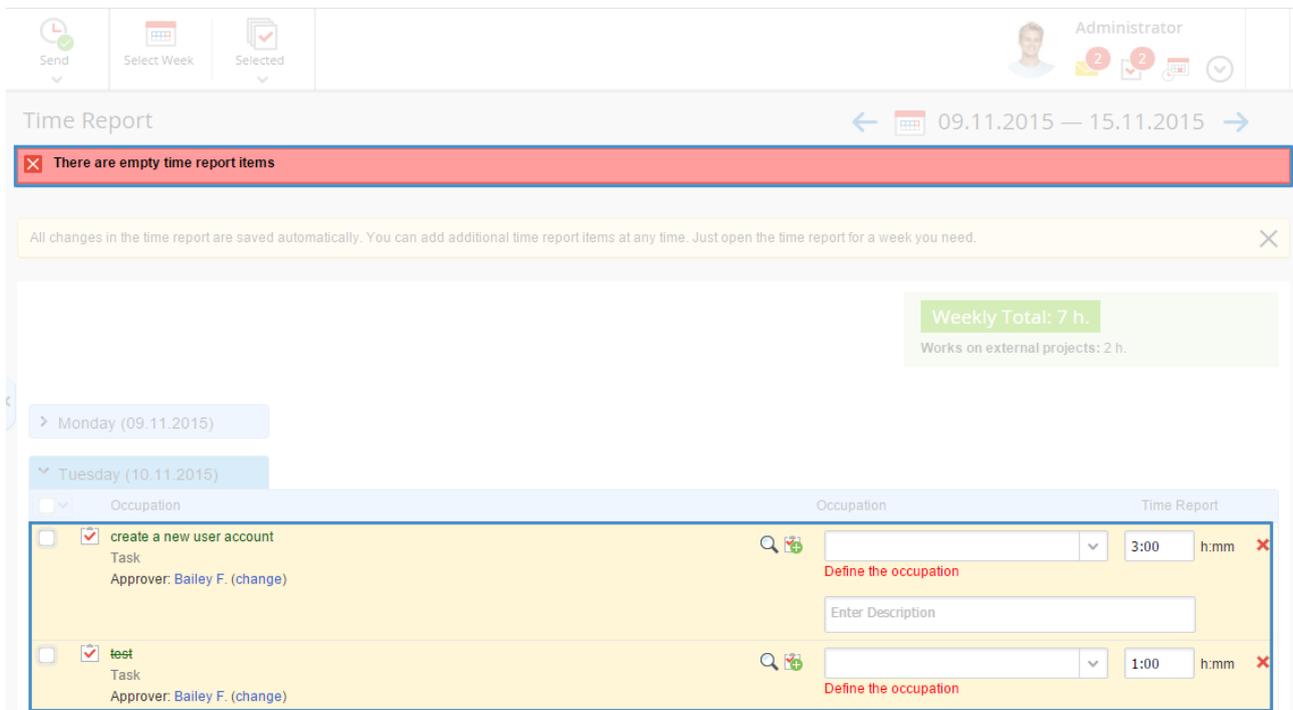
Fig. 75. Time Report error

If you are included in the **Personal Time Report Approval** user group and you specify yourself as approver when submitting a report, a window for confirmation of such reports will appear.

Each report is sent to the person listed as **Approver**. In **Tasks → Time Report → Reports** you can track your report, verify its status and edit the reports that are pending approval.

Time Report Approval

Approvers must either approve or reject a time report once they receive it. If the **Send notifications about new approval tasks** option button is set to **Yes**, the approvers receive notifications about new approval tasks (Fig. 76). By clicking on the notification, they can go to **Tasks → Time Report → Approval** (Fig. 77).
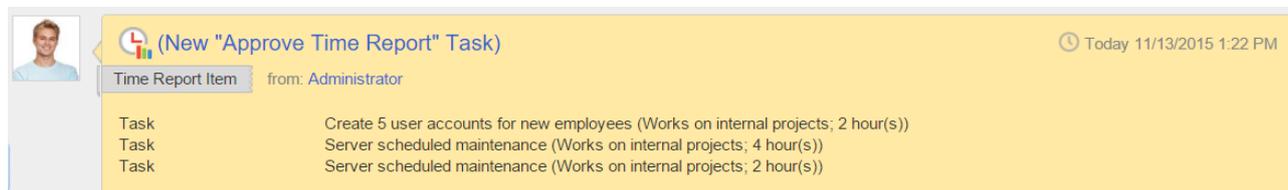
Fig. 76. Notification on new time report approval tasks

Time reports are approved in **Tasks → Time Reports → Approval** (Fig. 77).
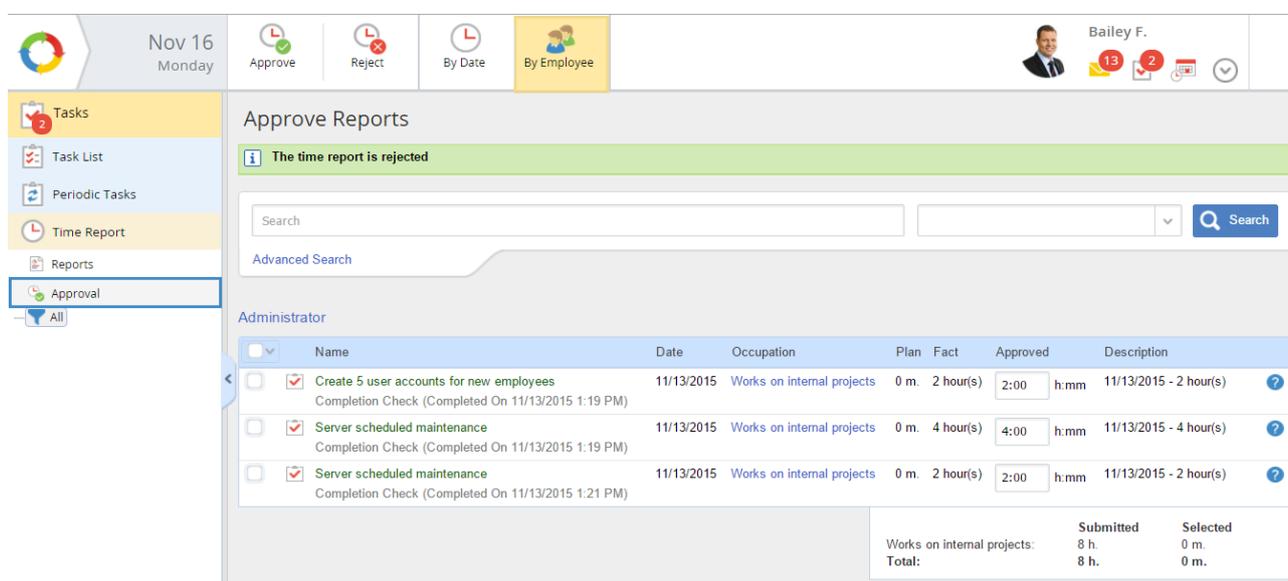
Fig. 77. Tasks → Time Report → Approval

This section shows all the time reports pending approval and provides a brief description. You can organize the list by user (use the **By Employee** button in the upper menu) or by reported days (use the **By Date** button in the upper menu). Below the time report list, you can see a summary table of all the time reports.

To ask a question about a time report pending approval, click the 🔵 button on the right side of the report.

By clicking on the time report's title, you will open its page (Fig. 77), containing full information about the approval task.
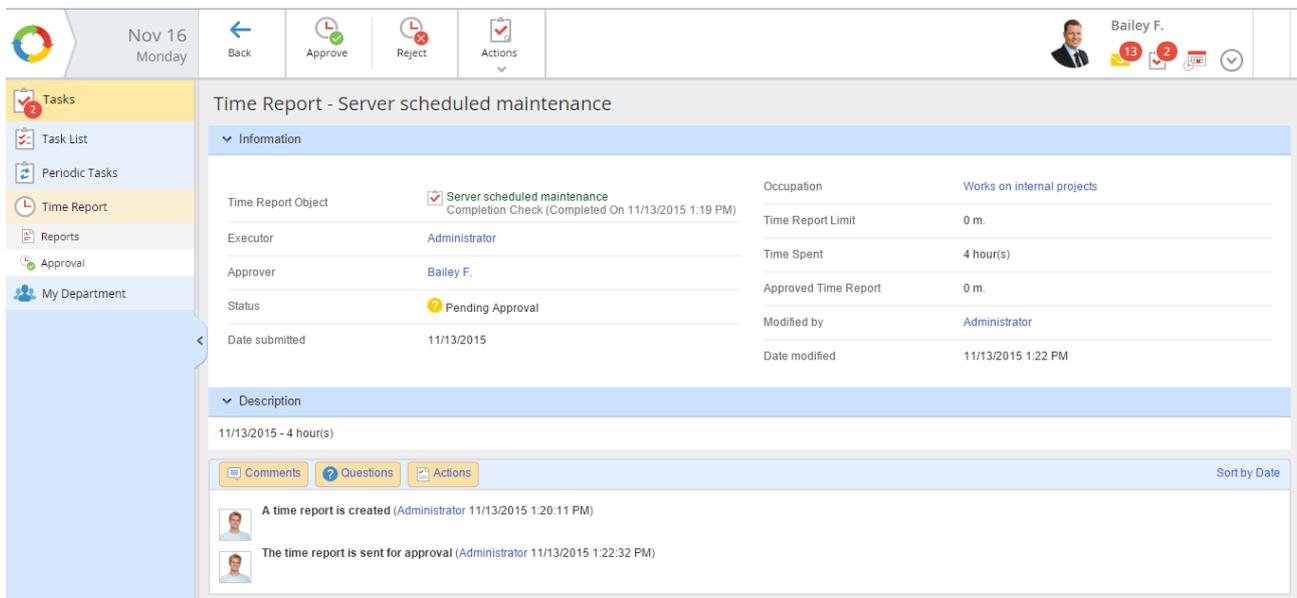
Fig. 78. Time Report's page

You can reject or approve a time report either on the report's page (Fig. 78) or in the **Approval** section (Fig.), where you can manage several reports at once.

Approving a time report from the report's page. Click **Approve** or **Reject** in the top menu of the time report page (Fig. 77). After clicking **Approve**, you will see a window where you have to specify the number of hours approved (it can differ from the time reported) (Fig. 79). If you click **Reject**, you must specify the reason for rejecting.
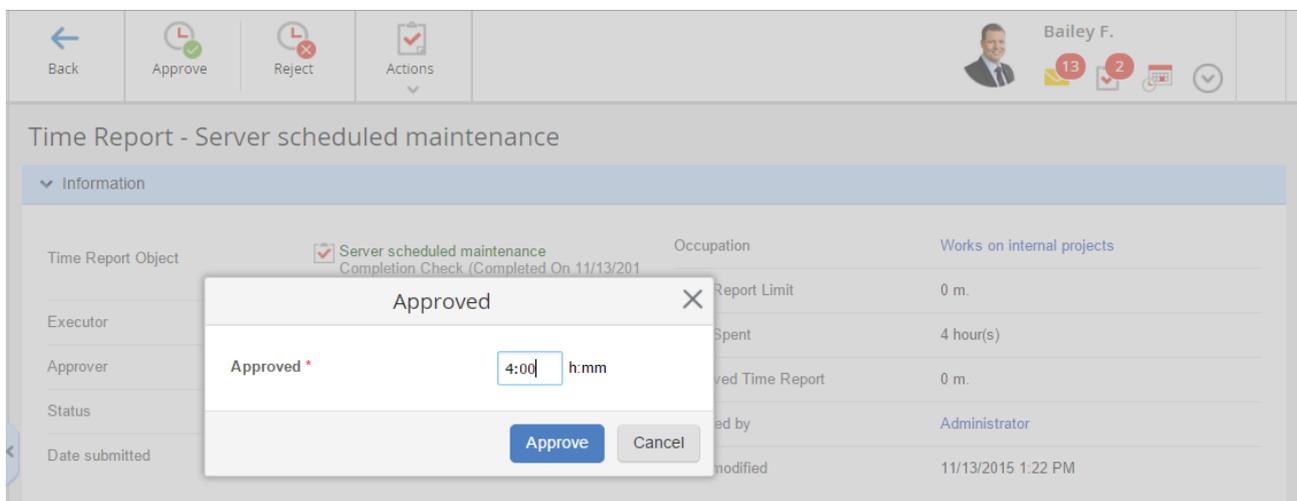
Fig. 79. Specifying the number of hours approved

Approving a time report in the Approval section. Select the required reports in the report table. If needed, edit the number of **Approved** hours and then click **Approve** or **Reject** in the top menu of the page. If you click **Reject**, you must specify the reason for rejecting.

If the **Send notifications about approval results** option button in the **Time Report** settings is set at **Yes**, the user who submitted the time report will see a notification in their **Messages** section.

A user with corresponding access permissions can review and change the decision made about a time report. These access permissions are set by the administrator in **Administration → Users → Access Settings → Global Access Settings → Tasks → Time Report Administration**. Such users can see every other user's time reports in their **Tasks → Time Reports → Reports** section in the **All** filter.

Chapter 8. Company

The **Company** section offers summarized information about all the **ELMA** users and provides quick access to such actions as creating a task, a message or an event. By default, this section is available in the left and the main menus of **ELMA Web Application**.
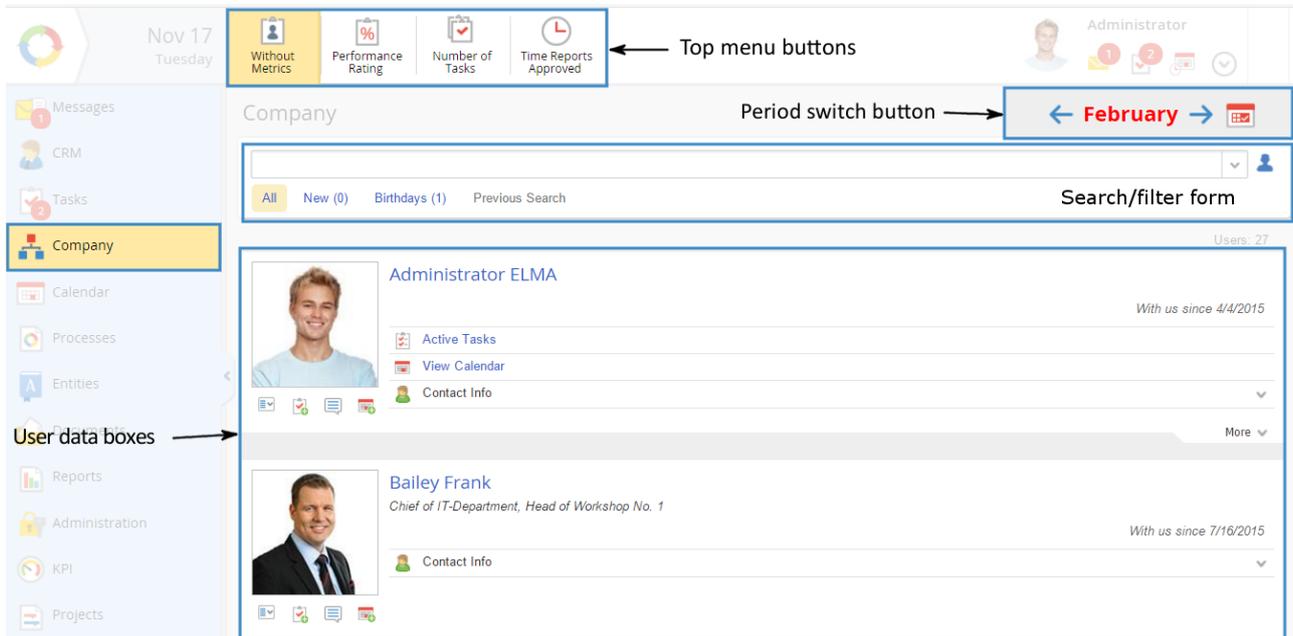
Fig. 80. Example of the Company section

This section features a top menu, period option button (by months), search and/or filter forms for users and user data boxes (Fig. 80).

1. With the **Top menu buttons,** you can set the data boxes to display information about schedule compliance, number of tasks (all tasks and completed tasks) and the total amount of time reported.

2. With the **Period switch button** you can choose, for which period you want the additional data and user data boxes to be displayed.

3. The **Search/filter form** is a quick search and filtering tool, allowing to search users by their full name.

Below the search field, you can find the following filtering buttons:

- **All** – All the users;
- **My Department** – Only the subordinate employees of the current user (according to the company's organization structure);
- **New** –Employees hired during the selected period;
- **Birthday** –Employees who have birthdays during the current period;

- **Previous Search** – Previously filtered employees (their surname and/or name was typed in the search field).

To search the organization structure, first click the 👤 icon on the right side of the search field, and then click ⛗. ELMA will offer you a list of all the organization's employees.

4. The **User data boxes** contain the selected user's personal information and contact data (this panel is collapsed by default), and buttons to create tasks, events or messages. Click **More** to expand the box and see additional information about the schedule compliance and time reported.

In the **Company** section, you can send a message and create a task or an event for a selected group of users. You can select the users in the search field or by left-clicking on their picture. The selected users will be then marked with ✓ . Then, below the search filed, click on the icon of the action that you want to perform (create a task, event or a message) (Fig. 81). To deselect a user, simply left-click on their picture.
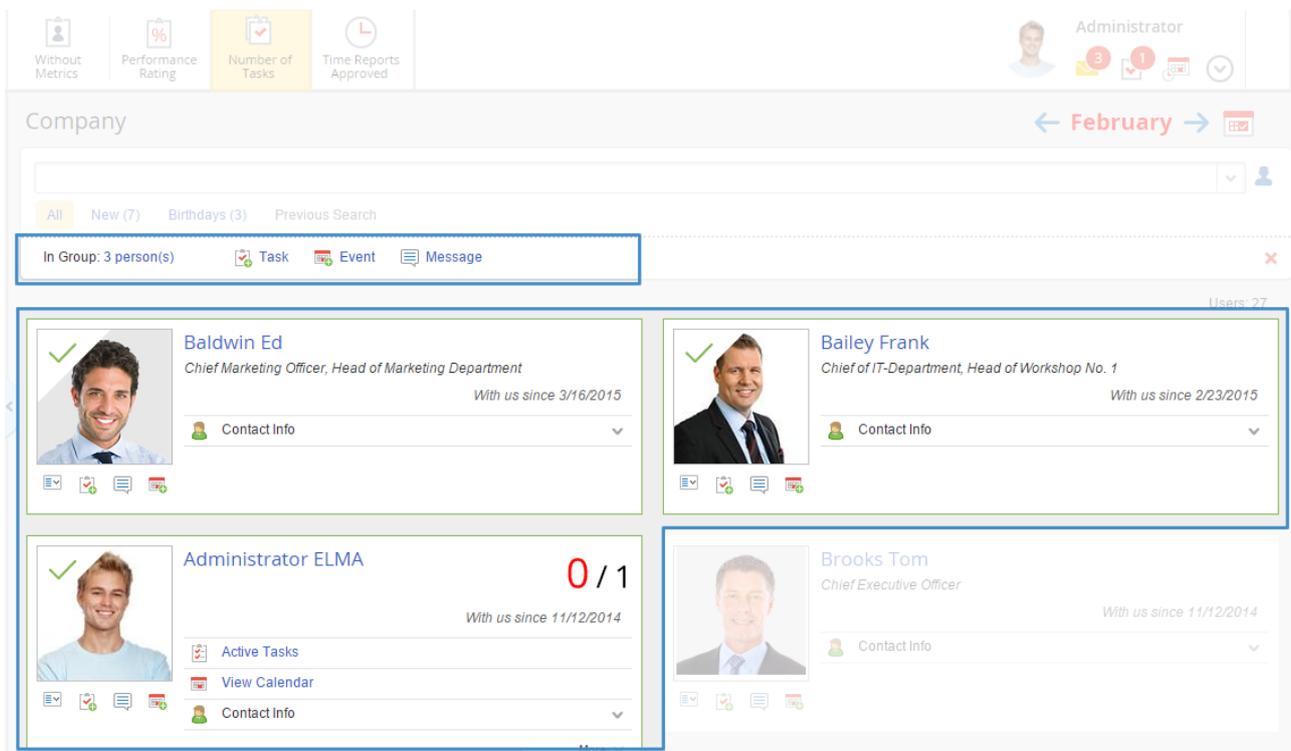
Fig. 81. Selected group of users and Task, Event and Message buttons

Chapter 9. Substitutions and Absence Schedule

ELMA allows to manage absence and substitutions of employees.

If an employee is absent for a long time, another employee can substitute them, so that the business processes within the company are not interrupted. In this case, all the tasks of the absent user are automatically delegated to the user who substitutes them; the task author is informed. The tasks that was assigned to the substituted user prior to the date of substitution, are not automatically reassigned to the substitute. To manage substitutions go to **Administration → Users → Substitutions**, for more details see **ELMA Help** and **ELMA BPM Platform manual**.

The absence schedule does not reassign business process tasks and is used merely for information purposes. If the executor that you want to select when creating a task is absent, you will be informed about it. This notification does not affect the task in any way. An absent user still receives messages, tasks, notifications, etc.

The absence schedule is managed in **Administration → Users → Absence Schedule** (Fig. 82) and is accessible for users with access permissions. The access permissions for this section are set in **Administration → Access Settings → Global Access Settings → Absences Administration**. By default, only the system administrator can give access permissions.
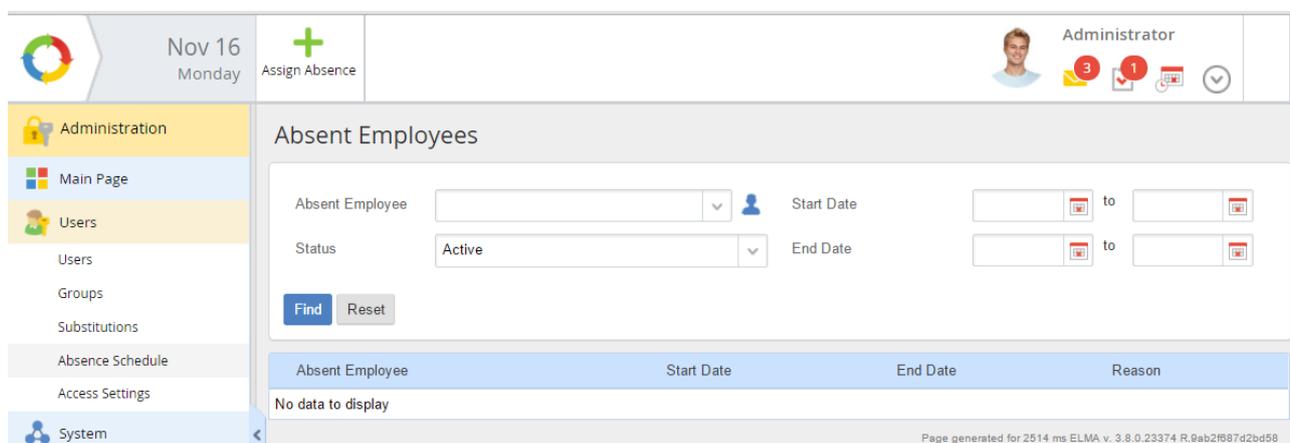
Fig. 82. Absence Schedule section

The **Absence Schedule** section (Fig. 82) features a filter form and a list of data created in the configurable absence system.

To enter an absence, click **Assign Absence** (Fig. 82) in the top menu. In the provided absence form (Fig. 83) select the absent user, dates and reason for absence, and click **Save** in the top menu.

Fig. 83. Assigning an absence

The entered absence will appear in the absence schedule (Fig. 84). In the entry's context menu, you can delete or edit the entry or assign a substitute.

Fig. 84. List of absent employees

The absence notification only appears on the task creation page when the absent user is selected as executor and assigned with the task (Fig. 85).

Fig. 85. Notification on absence when choosing task executor

Chapter 10. Document Storage

Document Storage is a central storage system for electronic documents and folders, allowing to quickly access and manage information, view document history, manage access permissions, etc.

ELMA stores documents in the **Documents** section (Fig. 85) featuring a file storage interface, where documents are stored in folders and subfolders. The folder hierarchy is managed by the system users and forms the entire company's archive. Such a storage system make it easy to search for documents and provides data and document security.
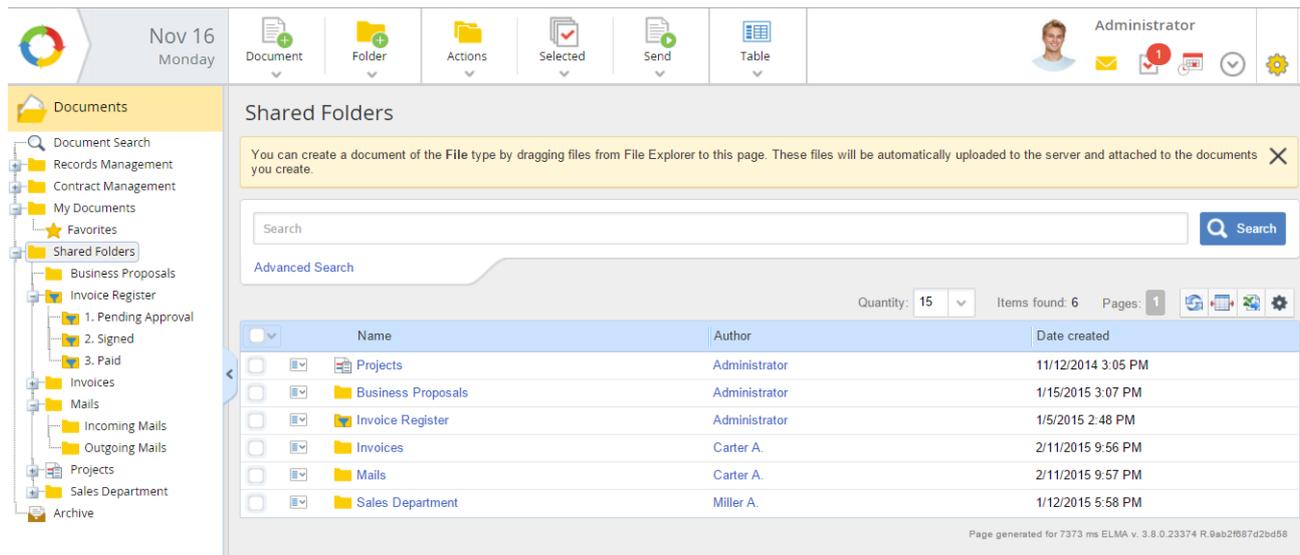
Fig. 86. Documents → Shared Folders section

Learn how to create, configure and use the **ELMA** document storage and manage the documents in the **ELMA ECM+ quick-start manual**. It features the basic **ELMA ECM+** capabilities for organizing electronic document management in a company. For more details, see **ELMA Help**.

The document storage is included in **ELMA**, while records management, classification scheme and document routing are only available with **ELMA ECM+.**

Chapter 11. CRM

For customer relationship management, **ELMA** offers the **CRM** section (Fig. 87), divided into several subsections.

Fig. 87. CRM section

There are certain **CRM** functions that are available in **ELMA** without the **ELMA CRM+ application**:

- Schedule phone calls, meetings, letters, and record their results;
- Keep a database of leads and contractors;
- Manage contacts;
- Handle deals;
- Schedule incoming payments;
- Configure and manage the sales funnel;
- Marketing (a list of marketing activities, performance analysis);
- Using CRM elements in business processes.

With **CRM+**, the following features also become available:

- Active sales funnel (triggers business processes when a deal stage is changed);
- Sales dynamics analysis (Deal Dynamics);
- Integration with IP-telephony.

Read the **ELMA CRM+ quick-start manual** for more information on configuration and **CRM** use cases in **ELMA**. It describes the basic features of **ELMA CRM+** for customer relationship management within a company. For even more details, see **ELMA Help**.

Chapter 12. Web Portal Customization

ELMA features flexible user interfaces that can be customized without programming. To make the **Web Application** easier to work with, we recommend using various interfaces that provide only those functions that users need for their work.

You can find information about how to customize the **Web Application** and create and use interfaces in the **ELMA BPM Platform quick-start manual**. For more details, see **ELMA Help**.

Chapter 13. Useful References

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

- User Manual of **ELMA BPM**
- User Manual of **ELMA ECM+**
- User Manual of **ELMA CRM+**
- User Manual of **ELMA Projects+**
- User Manual 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 the **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**. You can find it on our website http://www.elma-bpm.com/. 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: + (353) 20-30-11-40