

BPMS - User Manual

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Interfacing Technologies Corporation

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1.0 The Digital Business Platform

The Digital Business Platform is Interfacing's RAD solution that allows users to create workflow applications. This help manual is designed for end users of the Digital Business Platform Web Application and will explain the Web Application features and layout.

This introduction section is comprised of:

- [1.1 What is the Digital Business Platform](#)
- [1.2 Process](#)
- [1.3 Forms](#)
- [1.4 Resources and Roles](#)

1.1 What is the Digital Business Platform?

Interfacing's Digital Business Platform uses flow management technology that illustrates tasks and works in a flow diagram, focusing on the people performing the tasks and their individual roles. Digital Business Platform can help companies build, improve and share processes from a central repository. Business rules can then be applied at any stage of the workflow to automate tasks or minimize manual intervention. The ability to track and provide status reports throughout each phase of a process allows for accurate performance and coordination across manual and systemized tasks. The Digital Business Platform has the capability to sync user data and other information from the EPC, such as risks, controls, rules, and more.

The Digital Business Platform Designer

The Digital Business Platform Designer is a Rapid Application Development tool that allows users with a minimal software development knowledge to quickly develop functioning web applications by minimizing code. The DBP offers the ability to design and manage entities, processes and forms. Rules, actions and guards can be defined and associated with business processes to automate or minimize intervention during the workflow. Developers can design Dashboards and Business Activity Monitoring dashboards for analytic purposes.

The Digital Business Platform Web Applications

Applications that are developed using the Designer are deployed on the web. Users can use these applications by simply navigating to the URL to which the app was deployed and start using the application. The DBP User Homepage contains all of the solutions designed in the platform in a highly visualized environment.

1.2 Process

Applications within the Digital Business Platform are based on processes. Processes are defined by process designers (similar to process mapping in the EPC). These processes are then run in the process engine and executed via Web Applications that are designed on top of the process.

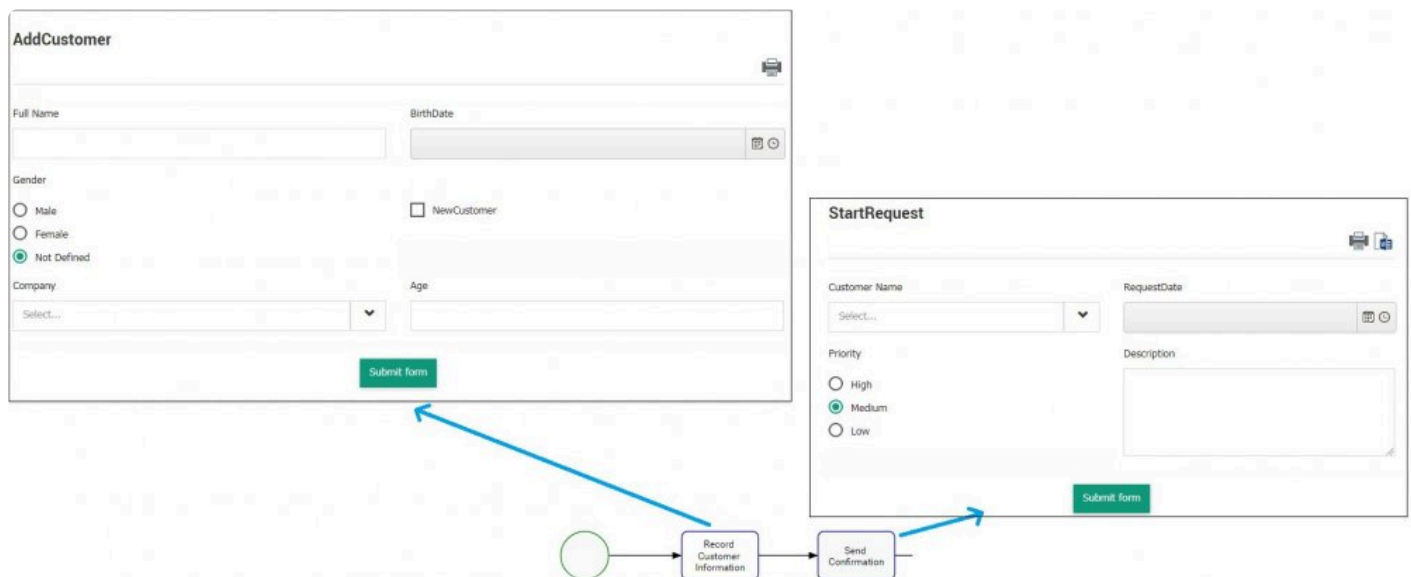
The Digital Business Platform supports a variety of processes, including human-based processes, system-based processes as well as combined processes (both human and system). This allows for increased enterprise-wide agility and automation.

Each step of a process can be associated with forms, which users interact with during the process execution.

1.3 Forms

Forms refer to the physical interface users interact with in the Web Application. Forms are created by designers and linked to tasks of a process. System based processes are usually automated and are not linked to forms. An example of a system task is the Scheduler; it will trigger a certain process when the set time has been reached. However, human-based processes require human input in order to advance the workflow.

The image below shows an example of how a human based process is linked to forms. In this example, submitting the form in the first step will trigger the second step.



1.4 Resources and Roles

The Digital Business Platform functions similarly to the EPC, where resources refer to the user (person) and where roles refer to the job title a particular resource has.

The Digital Business Platform is a centralized web application where users can receive and perform tasks assigned to them. Tasks are usually performed within forms. For more information on process and forms, click [here](#).

Tasks can be assigned to either:

- The Resource
- The Role

Tasks assigned to the Resources

Tasks assigned to resources are linked directly to your user profile

e.g. The task is assigned to John Doe (resource). The task will be performed by John Doe.

Tasks assigned to the Role

Tasks assigned to a role are linked directly with the role itself. A resource must be associated with the role.

e.g. The task is assigned to Customer Service Representative (role). CSR is linked to John Doe (resource). The task will be performed by the CSR.

2.0 Navigating in the Web Application

This section explains how to navigate in the Digital Business Platform web application, as well as the function of each options in the menus.

This section is comprised of:

- [2.1 Logging into the Web Application](#)
- [2.2 Home Page](#)
- [2.3 Changing your Password](#)
- [2.4 Changing the Home Page Theme](#)
- [2.5 Messages and Notifications](#)
- [2.6 Navigating to Applications](#)
- [2.7 Facilities](#)

2.1 Logging into the Web Application

The login page is the entry point for the Digital Business Platform.

1. The URL for the DBP is company specific. Contact an EPC/DBP administrator to obtain the correct URL.
2. Once the correct URL has been entered in your browser, the login page will be visible.
3. To log into the Web Application, click on the padlock icon on the top right corner.



4. You will be able to enter your credentials to log in.

Sign-in

Username

Password

Login

2.2 Home Page

Users are able to access all of the Digital Business Platform's features and functionalities from the home page.



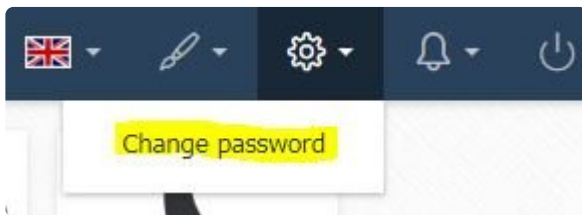
Letter	Element	*Description
A	Task List	Can be expanded by clicking on the arrow. Click here for more information
B	Facilities	Gives access to various DBP features. Click here for more information
C	Application(s) – Menu	Access to designed applications. Click here for more information
D	Application(s) – Tiles	Access to designed applications. Click here for more information
E	Language	Language Options
F	Theme	Theme Options. Click Here for more information
G	Options	DBP General Settings
H	Notifications and Messages	Notification and messaging center. Click here for more information
I	Logout	Logs out the user

2.3 Changing your Password

To change your password, click on the icon on the top toolbar depicted by a cogwheel.



1. A dropdown with the “Change Password” option will appear. Clicking on it will bring you to the password reset page.



2. Enter your current password
3. Enter your new password and confirm it
4. Click on Save

Change password

Change password

Current password	<input type="password"/>
New password	<input type="password"/>
Confirm new password	<input type="password"/>

Save

2.4 Changing the Home Page Theme

Users can change their Home Page theme by clicking on the icon depicted by a brush in the menu toolbar.



The following themes are available:

- Default
- Blitzer
- CyanOrange
- DarkblueGreen
- GreenYellow
- GreyBlue
- HotSneaks
- Lightness
- NavyBlue
- OrangeCyan
- Pink
- Redmond
- Start
- Sunny

2.5 Messages and Notifications

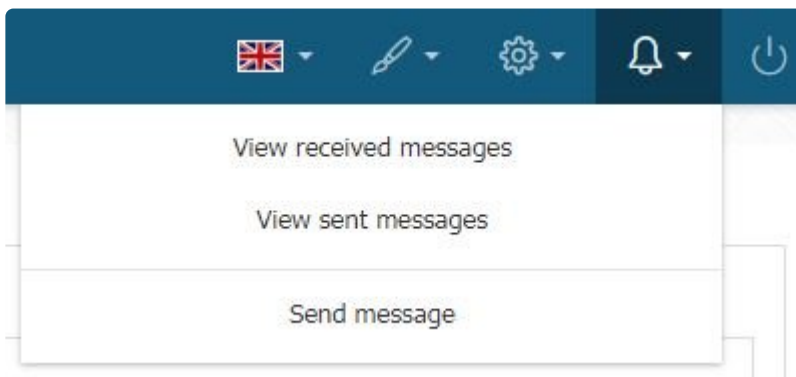
Messages and notifications can be accessed via the icon depicted by a bell in the main toolbar menu.

! Currently, the ability to send messages must be toggled in the DBP Organization Module for an user to see the “Send Message” option




From the menu you can access


- [View Received Messages](#)
- [View Sent Messages](#)
- [Send Messages](#)




2.5.1 Received Message

 Coming Soon

2.5.2 Sent Messages

 Coming Soon

2.5.3 Send Messages

 Coming Soon

2.6 Navigating to Applications

Security Settings

When applications are being designed, each form is assigned “Principals”. The principals are users who are allowed to initiate the form. If a user was not given permission to initiate the form, they will not be able to see the application in the menu bar OR the home page.

App Navigation Using the Menu Bar

Applications can be accessed via the top menu if they have been enabled. Applications shown in the menu bar can be accessed from anywhere within the Web App.



App Navigation from the Home Page

Applications can also be accessed by clicking on the appropriate tile on the main menu. The tile thumbnail can be uploaded in the designer. The uploaded image will be reflected for all users on their home page.



NOTE: Applications can be displayed on BOTH the menu bar and in the home page. They

can also be only displayed in the menu bar and not in the home page, and vice versa.

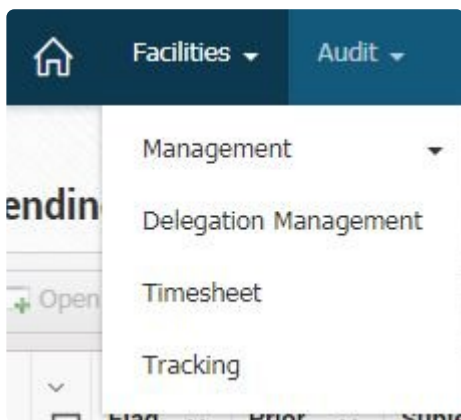
2.7 Facilities



Access to the different options in the Facilities menu is based on permission given by the user.

The Facilities are accessible through the Facilities drop-down to the left of the menu toolbar.

- [Management](#)
- [Delegation Management](#)
- [Timesheet](#)
- [Tracking](#)

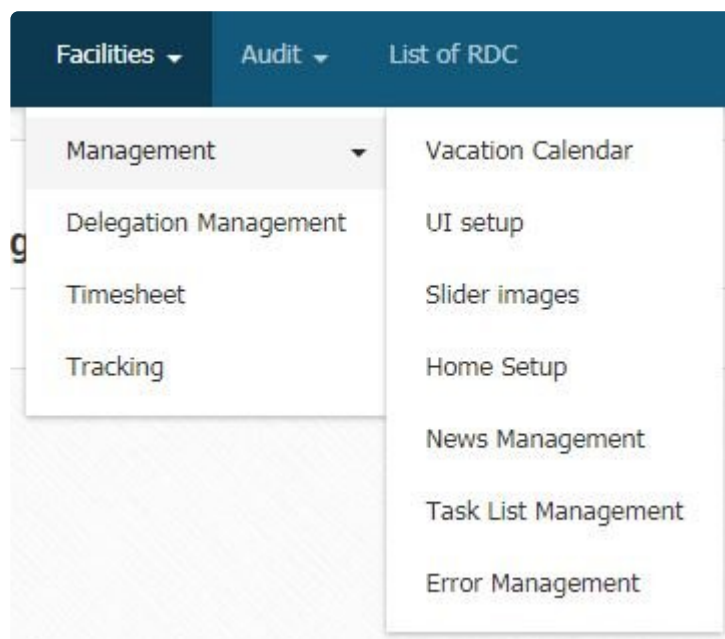


2.7.1 Management

The Management section of the Facilities is for management purposes.

The Management drop-down includes:

- [Vacation Calendar](#)
- [UI setup](#)
- [Slider images](#)
- [Home Setup](#)
- [News Management](#)
- [Task List Management](#)



2.7.1.1 Vacation Calendar

The vacation calendar allows users to indicate their availabilities for the year.

Vacation calendar

Year: 2019

	January	February	March	April	May	June	July	August	September	October	November	December
Sunday									1			1
Monday				1			1		2			2
Tuesday	1			2			2		3	1		3
Wednesday	2			3	1		3		4	2		4
Thursday	3			4	2		4	1	5	3		5
Friday	4	1	1	5	3		5	2	6	4	1	6
Saturday	5	2	2	6	4	1	6	3	7	5	2	7
Sunday	6	3	3	7	5	2	7	4	8	6	3	8
Monday	7	4	4	8	6	3	8	5	9	7	4	9
Tuesday	8	5	5	9	7	4	9	6	10	8	5	10
Wednesday	9	6	6	10	8	5	10	7	11	9	6	11
Thursday	10	7	7	11	9	6	11	8	12	10	7	12
Friday	11	8	8	12	10	7	12	9	13	11	8	13
Saturday	12	9	9	13	11	8	13	10	14	12	9	14
Sunday	13	10	10	14	12	9	14	11	15	13	10	15
Monday	14	11	11	15	13	10	15	12	16	14	11	16
Tuesday	15	12	12	16	14	11	16	13	17	15	12	17
Wednesday	16	13	13	17	15	12	17	14	18	16	13	18
Thursday	17	14	14	18	16	13	18	15	19	17	14	19
Friday	18	15	15	19	17	14	19	16	20	18	15	20

To jump to another year, enter the value in the “Year” textbox and click on

To mark a day as a vacation day, click on the cell. The cell will be marked red. Click on the cell again to unmark it.

Vacation calendar

Year: 2019

	January	February	March	April	May	June	July	August	September	October	November	December
Sunday									1			1
Monday				1			1		2			2
Tuesday	1			2			2		3	1		3
Wednesday	2			3	1		3		4	2		4
Thursday	3			4	2		4	1	5	3		5
Friday	4	1	1	5	3		5	2	6	4	1	6
Saturday	5	2	2	6	4	1	6	3	7	5	2	7
Sunday	6	3	3	7	5	2	7	4	8	6	3	8
Monday	7	4	4	8	6	3	8	5	9	7	4	9
Tuesday	8	5	5	9	7	4	9	6	10	8	5	10
Wednesday	9	6	6	10	8	5	10	7	11	9	6	11
Thursday	10	7	7	11	9	6	11	8	12	10	7	12
Friday	11	8	8	12	10	7	12	9	13	11	8	13

Click on at the bottom of the form to save the calendar.

2.7.1.2 UI Setup

The UI Setup page allows the user to upload background images, change themes and personalize the top banner.

Background

This section allows the DBP Administrator to set a background image for the login and home page.

The screenshot shows the 'Personalization' section of the UI Setup page, specifically the 'Background' tab. The page has three sub-tabs: 'Background', 'Default Theme', and 'Top Banner'. The 'Background' tab is active. Below the tabs, there is a instruction: 'To select the login page and home page ,use the form below.' The form is divided into three main sections: 'Before login image:', 'Login image:', and 'Location:'. The 'Before login image:' section has a 'Choose File' button and a 'Current Image' placeholder. The 'Login image:' section also has a 'Choose File' button and a 'Current Image' placeholder. The 'Location:' section has three radio buttons: 'Repeat' (selected), 'Without Repeat', and 'Center'. To the right of these sections is a 'Background Color' section with a color swatch and the hex code '#00354F'. At the bottom of the form, there are 'Remove' buttons for each image placeholder and a 'Save' button. A note at the bottom left states: '* Attention: To see the changes, refresh the page.'

To upload an image in the login page and in the home page, click on “Choose File”

Before login image:	Login image:
<input type="button" value="Choose File"/> No file chosen	<input type="button" value="Choose File"/> No file chosen
Current Image	Current Image

To view the current image, click on [Current Image](#)

When an image is uploaded, you can choose the placement and pattern of the image.

- Repeat
- Without Repeat
- Center

To set a background color (if no background picture has been uploaded), click on the Background Color field. A color picker will appear.



The color picker interface includes a square color gradient, a vertical color bar, and a hex code input field. The hex code field currently displays #FFFFFF.

Save

To save your changes, click on



The default background color is white. To change the background color, you must set the color to white and Save and Upload

✕ Remove

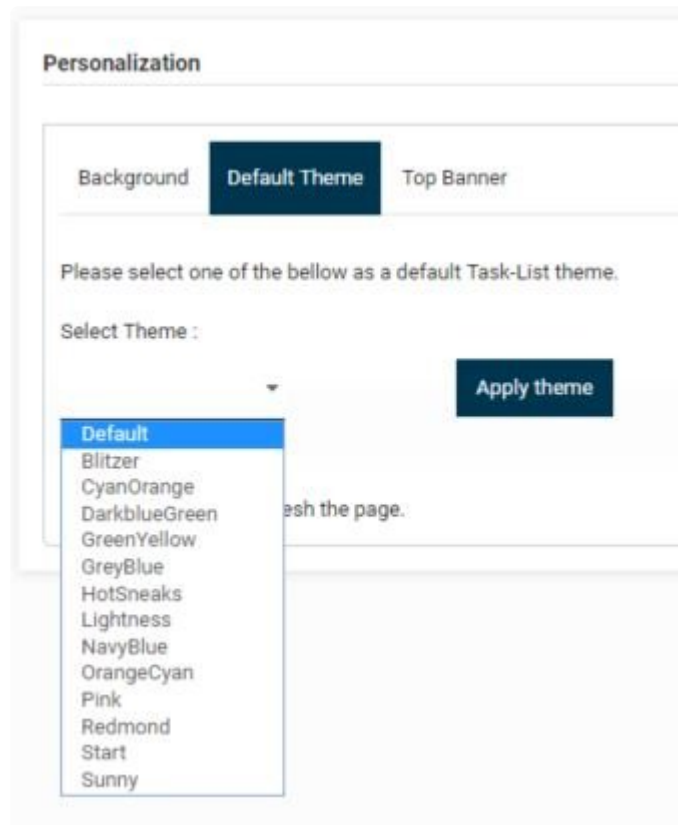
To remove uploaded pictures, click on



You must refresh the page for the changes to be reflected. In the case you are not able to

see the background pictures or background color, clear your cache and reload the page.

Default Theme



The screenshot shows a web interface for personalization settings. At the top, there's a section titled "Personalization" with three tabs: "Background", "Default Theme" (which is selected and highlighted in dark blue), and "Top Banner". Below the tabs, a text prompt says "Please select one of the bellow as a default Task-List theme." followed by "Select Theme :". A dropdown menu is open, displaying a list of theme names: Default, Blitzzer, CyanOrange, DarkblueGreen, GreenYellow, GreyBlue, HotSneaks, Lightness, NavyBlue, OrangeCyan, Pink, Redmond, Start, and Sunny. The "Default" option is highlighted in blue. To the right of the dropdown is a dark blue button labeled "Apply theme". Below the dropdown, there is a faint text "ash the page."

Top Banner

Personalization

Background

Default Theme

Top Banner

Use the form below to select a site banner. NOTE:

- Only jpg, png or gif files are supported.
- Image's height should not exceed 149 pixels.
- Banner's image height should be 149 pixels.

Banner's default image

Choose File

Left-Side Image:

Choose File

Center Image:

Choose File

Right-Side Image:

Choose File


Save


* Attention:
To see the changes, refresh the page.

2.7.1.3 Slider Images

Administrators have the ability to upload a set images that will be displayed at the top of the login page. These images will be viewable by all users of the DBP. Multiple images can be uploaded and saved.

✿ Up to 4 images can be selected


To upload an image, click on . The windows explorer window will pop up to allow the user to choose an image file.




To remove an image from the list, click on .




To save uploaded images, click on .





The image order allows users to set the order in which images are displayed.

After uploading and saving the images, they will be displayed in the Login page of the DBP web application.

 PurchaseOrder ▾


  






DMS Audit Quality Check PurchaseOrder

News

**Brain Training...**

The first large study to rigorously examine brain-training games using cognitive tests and brain...

Date: 27/03/2018 | [Show more details](#)

**Meeting about new project**

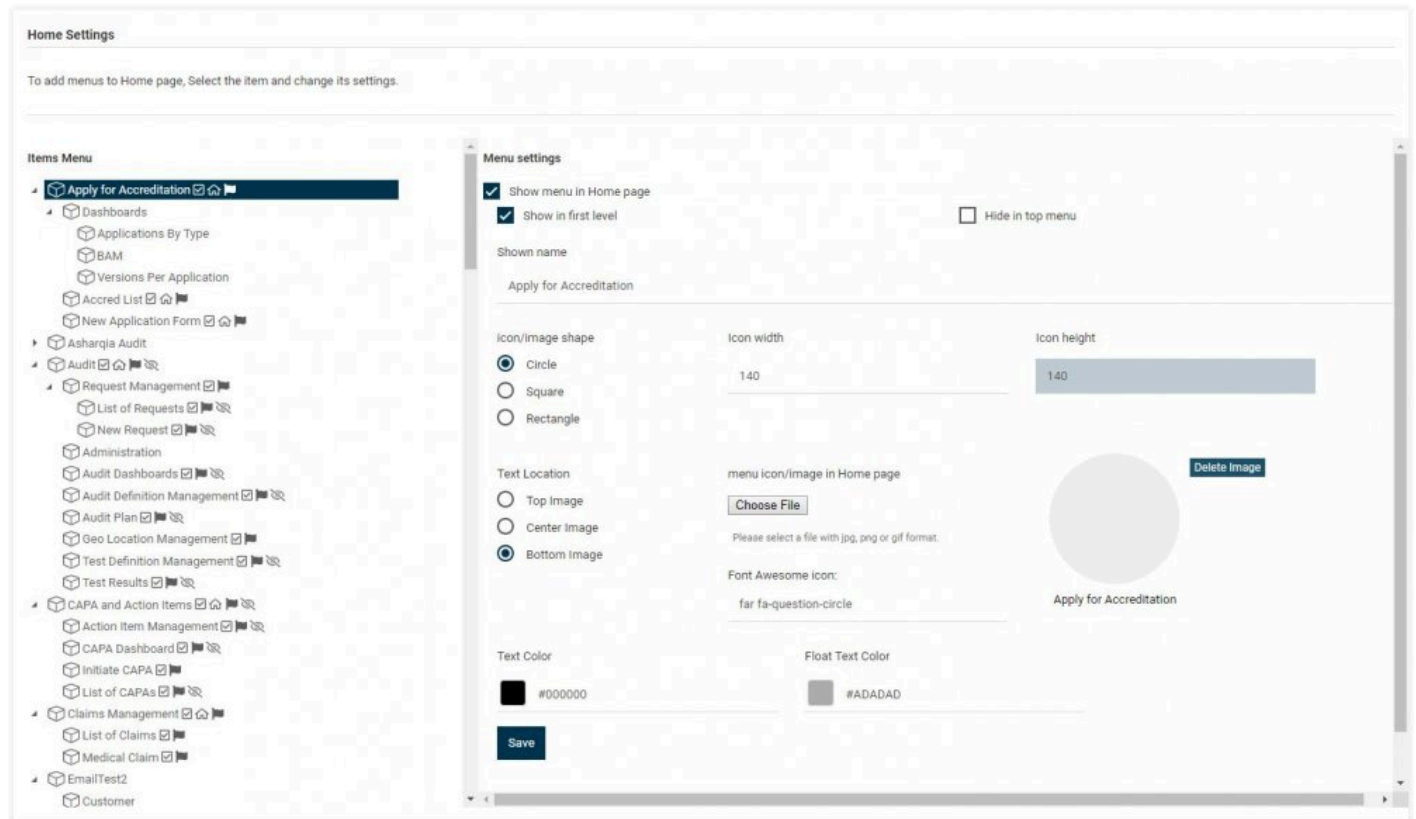
Why Meetings are Important? Why are meetings common in a corporate setting and a business...

Date: 27/03/2018 | [Show more details](#)

1


2.7.1.4 Home Setup

The Home Settings allows administrators to manage which applications to show in the user's home page.



Items Menu

The items listed here are the different applications available to a DBP server. Clicking on a folder allows the administrator to change the application's display settings in the home page. Applications can be displayed as tiles in the home page.

The green checkmark  next to the folder indicates that it is currently being shown in the home page.

Menu Settings

This section allows the administrator to manage display details of various folders and applications on the home page.

Menu settings

☒ Show menu in Home page **A**

☒ Hide in first level **B** ☐ Hide in top menu **C**

Shown name **D**

PurchaseOrder

Icon width **E** 140 Icon height 140 menu icon/image in Home page **F**

No file chosen


Please select a file with jpg, png or gif format.

icon/image shape

G ☐ Circle ☒ Square ☐ Rectangle

Text Location

H ☐ Top Image ☐ Center Image ☒ Bottom Image

 **Delete Image**

PurchaseOrder

Text Color **I** #000000 Float Text Color #FFFFFF Highlight Text Color #DDDDDD

Letter	Component	Description
A	Show Menu in Home Page	Shows the application as a tile in the home page
B	Hide in First Level	—
C	Hide in Top Menu	Hides the application in the top menu
D	Shown Name	The displayed name of the application tile in the home page
E	Icon Width and Height	The height and width of the tile
F	Image Upload	The image that will serve as the tile
G	Icon/Image Shape	The shape of the tile

H	Text Location	The location of the text relative to the tile
I	Text Color Options	Color options for the shown name

Show Menu in Home Page

Checking this option will display the application as a tile in the home page

! You must check “Show Menu in Home Page” to enable the options below.



PurchaseOrder

Hide in First Level

-

Hide in Top Menu

Checking this option will hide the application from the top menu



Shown Name

The name entered in this box will be the name shown for the application tile (in the picture above, PurchaseOrder is the shown name of the application tile)

Icon Width and Height

The icon width and height of the tile is 140×140. Users can set them lower to reduce the size of the tile.

Upload Image

To upload an image, click on . To delete the image, click on .

Icon/Image Shape

The shape of the tile can be set by clicking on the radio buttons

Text Location

The position of the tile's title can be set by clicking on the radio buttons.

✿ The tile preview will reflect selected changes in the shape and text location section



icon/image shape

☒ Circle ☐ Square ☐ Rectangle

Text Location

☐ Top Image ☒ Center Image ☐ Bottom Image


Action

Text Color

The color of the tile's title can be set. There are 3 options available:

- Text Color
- Float Text Color
- Highlight Text Color

Saving your changes

To save your changes, click on .

An orange rectangular button with the text "Apply changes to all" in white.

To apply the menu settings to all items in the menu, click on



To have the changes reflected in the menu, you must refresh the page.

2.7.1.5 News Management

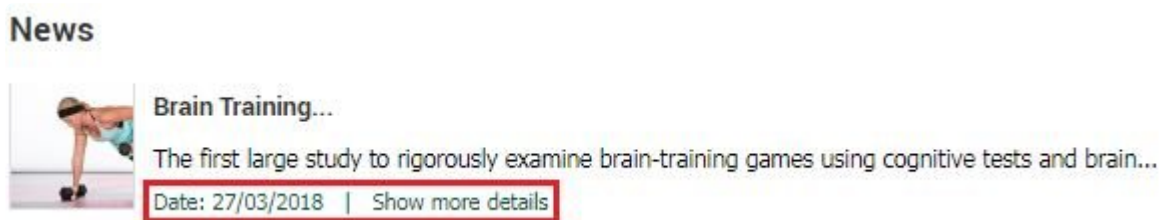
DPB administrators can add and manage news articles via the News facilities section. News can be broadcasted to all users of the DBP. Articles are displayed in a window in both the login page and the home page

News Widget



The news widget shows all articles added. By default, the news widget contains 3 new items per page. Users can use the page numbers to navigate between the news items.


Users can click on on the link underneath the News Management to expand the news item.



Editing the News Widget

To edit news, navigate to Facilities > Management > News Management.

Adding a News Article

To add a news item, click on  at the top of the form. The form for adding a news item will appear.

Insert [X]

Title **A**

Text **B**

Text Color **C**

☐ Visible for ordinary users **D**

☒ News setup **E**

News Image

Choose File No file chosen

News Priority

A jpg, png or gif file format less than 100 kb.

Save

- A. The title of the article
- B. The content of the article
- C. The color of the font
- D. Checking this will make the news article visible to others
- E. Checking this enables for a thumbnail (jpg, png or gif file format. File size limited to 100kb) to be uploaded and the "News Priority" to be set.


- * The News Priority field must be a number, 1 being the highest priority. Items with higher priority will be displayed before lower priority items.



When the article has been added, click on .

- * Note: to see the changes, you must refresh the home or login page.

Editing a News Article

To edit a news article, click on  on the same row as the article you want to edit.

The same form to add a news article will appear. See section above for descriptions of the Edit form.

Removing News Article

To remove a news article, simply click on  on the same row as the article you want to delete.

You will be prompted to confirm the removal of the article

Are you sure you want to delete?

Yes

No

2.7.1.6 Task List Management

The task list management section allows the DBP administrator to manage the task list of all users and roles

Tree Folders

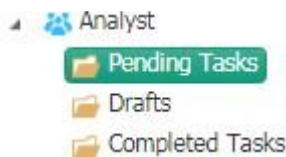
Tree folders

☐ Pending folder of the first staff will be selected after the login.

☐ Hide user default folders (such as pending, working and draft)

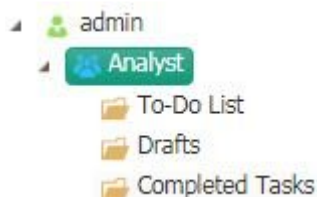
These settings are applied across all users of the Digital Business Platform.

- Pending folder of the first staff will be selected after the login: Checking this will, by default, select the “Pending Folder” of the task list associated to the role assigned to the user



- hide user default folders: Checking this will hide by default the user task lists

! Checking this will hide the default folders and users will not be able to access them until this option is checked off.



Data Settings Within the Task List

Date settings within Task-List

Status: Accurate Approximated

Show exact date and time Show past days approximately

Select a person, job position or a group to rename main folder

▼

To-Do Tasks folders:

Completed Task folders:

Draft Requests:

Rename Folders

* Attention:

To see the latest changes please login again.

Date fields in the task list, such as Created at, Deadline, etc, can be set to be either accurate or approximate.

- Accurate: Will display the exact date and the time in this format: YYYY-MM-DD HH:MM:SS
- Approximated: Will display the approximate date in various format: XX Days Ago, About A Month Ago, XX Months Ago, XX Years Ago.

! These settings will be applied to all DBP users


The DBP Administrator can also edit the task list names of individual users and roles

To edit, use the dropdown or type a search value to select a user or a role.

Select a person, job position or a group to rename main folder



The screenshot shows a web interface with a search bar containing the text "analyst". Below the search bar is a dropdown menu with a downward arrow icon. The dropdown menu is open, displaying a list of four items, each preceded by a blue icon of three people. The items are: "Actuarial analyst", "Analyst", "Analyst", and "Analyst AP". A vertical scrollbar is visible on the right side of the dropdown list.

The To-Do Tasks, Completed Tasks and Drafts Folders names will be automatically populated with the current folder names for that user. Type a new name in the textboxes and click on 

2.7.1.7 Error Management



Coming Soon

Error logs

☒ Enable show error details. By enabling this option users will see the full technical error message on every error occurrence.

Search...

Number	Created at	Application Name
1	Tuesday, 14 November 2017 - 14:45:20	TIMS
<p>Level (1) Message: Arithmetic overflow error converting numeric to data type numeric. The statement has been terminated. Level (1) StackTrace: at Rayvarz.BPMS.Framework.UnitOfWork.HandleException(Exception ex) in D:\BPMSProject\branches\9603.0.0.0\source\Rayvarz.BPMS.Framework\UnitOfWork.cs:line 291 at Rayvarz.BPMS.Framework.UnitOfWork.HandleException(Exception ex) in D:\BPMSProject\branches\9603.0.0.0\source\Rayvarz.BPMS.Framework\UnitOfWork.CommitTransaction(Boolean clearSession) in D:\BPMSProject\branches\9603.0.0.0\source\Rayvarz.BPMS.Framework\UnitOfWork.cs:line 239 at Rayvarz.BPMS.Web.Framework.FormManager.CallFormAction(AjaxFormState formState, IFormObject formObject, HumanEvent humanEvent, IUnitOfWork unitOfWork, Boolean clearSession) in D:\BPMSProject\tags\9603.0.2.0\source\Rayvarz.BPMS.Web.Framework\FormManager.cs:line 1117 at Rayvarz.BPMS.Web.Framework.FormManager.SaveForm(User currentUser) in D:\BPMSProject\tags\9603.0.2.0\source\Rayvarz.BPMS.Web.Framework\FormManager.cs:line 188 Level (0) Message: Arithmetic overflow error converting numeric to data type numeric. The statement has been terminated. Level (0) StackTrace: at Rayvarz.BPMS.Web.Framework.FormManager.SaveForm(User currentUser) in D:\BPMSProject\tags\9603.0.2.0\source\Rayvarz.BPMS.Web.Framework\FormManager.cs:line 194 at Rayvarz.BPMS.Web.UI.WebServices.AjaxFormHandler.PostBackForm(String pageinstanceId, String sourceControlId, String applierPrincipalId, EventType eventType, Collection`1 inputFormData) in D:\BPMSProject\tags\9603.0.2.0\source\Rayvarz.BPMS.Web.UI\WebServices\AjaxFormHandler.aspx.cs:line 432</p>		
2	Tuesday, 14 November 2017 - 14:45:20	TIMS
3	Wednesday, 15 November 2017 - 11:31:27	TIMS
4	Wednesday, 15 November 2017 - 11:38:39	TIMS
5	Wednesday, 15 November 2017 - 11:39:10	TIMS
6	Wednesday, 15 November 2017 - 13:30:19	TIMS
7	Wednesday, 15 November 2017 - 13:30:19	TIMS
8	Wednesday, 15 November 2017 - 13:30:46	TIMS
9	Wednesday, 15 November 2017 - 13:32:48	TIMS
10	Wednesday, 15 November 2017 - 13:36:15	TIMS

1 - 10 of 11453 items

2.7.2 Delegation Management

Users are able to delegate their user task lists or their role task lists to multiple users.


Users will have their task lists belonging to them, and other separate task lists for the role to which they are assigned to.


Users can delegate their user tasks, or their role tasks. All of the delegates will appear in the table



	Delegate to: 	Start Date	Finish date
	admin	8/31/2018	

Delegating Task Lists

1. To delegate tasks, click on the “New” Button  on the top left corner of the window
2. The “Edit Delegations” form will appear. From the dropdown, select the user to which tasks will be delegated to
3. In the “Folders that delegator can view”, select the task lists which the delegators will be able to view and access

 Selecting the parent folder (folder belonging to the resource) will automatically select all of its child folders.

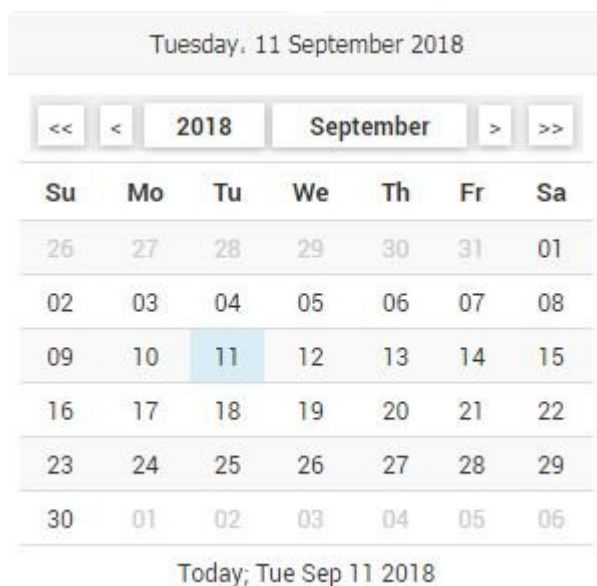
Folders that delegator can view:



4. Select whether it is a permanent delegation. If it is not the case, enter a Start Date and an End Date.

* A permanent delegation will make your task list available for the delegate for an indeterminate period of time. A non-permanent delegation will make your task list available to the delegate for a certain time period. Checking "Permanent" will disable the date fields.

5. If it is a non-permanent delegation, click on the date fields to bring up the date selector.



The << and >> buttons will advance the current date by a year.

The < and > buttons will advance the current date by a month

The year box **2018** can be clicked on to quickly select a year

The month box can be clicked on to quickly select a month

6. Click on Save to add the delegate


All delegates will appear in the list. If a permanent delegation has been set, there will be no finish date.

Editing Delegates

To edit a delegate, click on the row of the user you wish to edit. Save your changes once you have made the required changes

Deleting Delegates

1. To delete a delegate, click on the X icon on the far right of the row.

+ New			
	Delegate to: 	Start Date	Finish date
user1		9/11/2018	9/12/2018
user3		9/11/2018	

2. You will be prompted to confirm.

Are you sure?

Yes

No

2.7.3 Timesheet

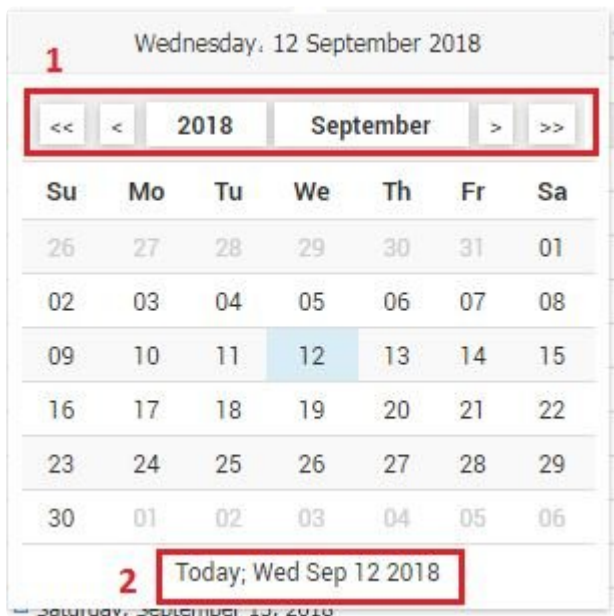
The timesheet allows users to track logged hours or planned hours for tasks within the Digital Business Platform. The timesheet is also accessible from the task list. All tasks added from the task list will appear in this section. For more information on the task list timesheet, click [here](#).

Letter	Component	Description
A	Week Search	Allows users to search for particular date or week

B	Weekly Timesheet	Displays hours and tasks
C	Navigation	Navigate between weeks, add or delete hours or tasks

Week Search

Users can search for a particular date or week. To search, click on the textbox. A calendar will appear. To select a date, click on the desired date in the calendar.



1. The “<<” and “<” buttons will roll back the date by a year and a month, respectively. The “>” and “>>”


buttons will increase the date by a month and a year, respectively. Clicking on will trigger a dropdown in which you can select a month and a year.

or

2. To instantly select the current date, you can click on this label.


Weekly Timesheet

The weekly timesheet shows information about task and hours. The date is displayed in a separate row. By default, the dates are expanded. To minimize/expand a date, click on – or + button.

	Start time	Finish time	Description
 Sunday, September 9, 2018			
	08:00	17:00	New CAPA - FMEA 2

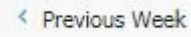
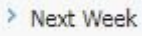


Users will see 3 columns:

- Start Time: The time the task was started/was set to start
- Finish Time: The time the task was finish/is set to finish on
- Description: The description of the task


 Users can edit task and time entries in the weekly timesheet by double clicking on a row.


Navigation

Users can navigate through weeks, delete and/or add tasks to the timesheet using this section.

-  : Goes to previous week
-  : Goes to the next week
-  : Deletes the selected task from the date
-  : Adds a task to the selected task

Adding a Task

Clicking on  allows an user to add a task to a date.

 You can only add 1 task per date.

1. Select the row under the date for which you want to add a task for
2. Click on "+ Add"
3. Fill in the information

 The "Remaining Time" field can only be set in the task list timesheet.

4. Save your changes

Timesheet

Date:

2018/09/12

Start time:

08:00

Finish time:

17:00

Remaining time:

Description:

Perform task A

Save

2.7.4 Tracking

Users are able to track a task within a process by using a system or custom generated tracking code. For more information on tracking see [4.0 Tracking](#)

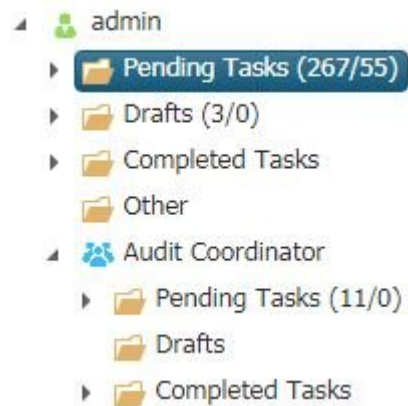
3.0 The Task List

The task list represents all the tasks the user has been assigned to, tasks that are in progress (draft) and completed tasks.

Tasks are segregated by user and by role.

For example, tasks initiated and sent to the user “admin” will appear in the users’s task list

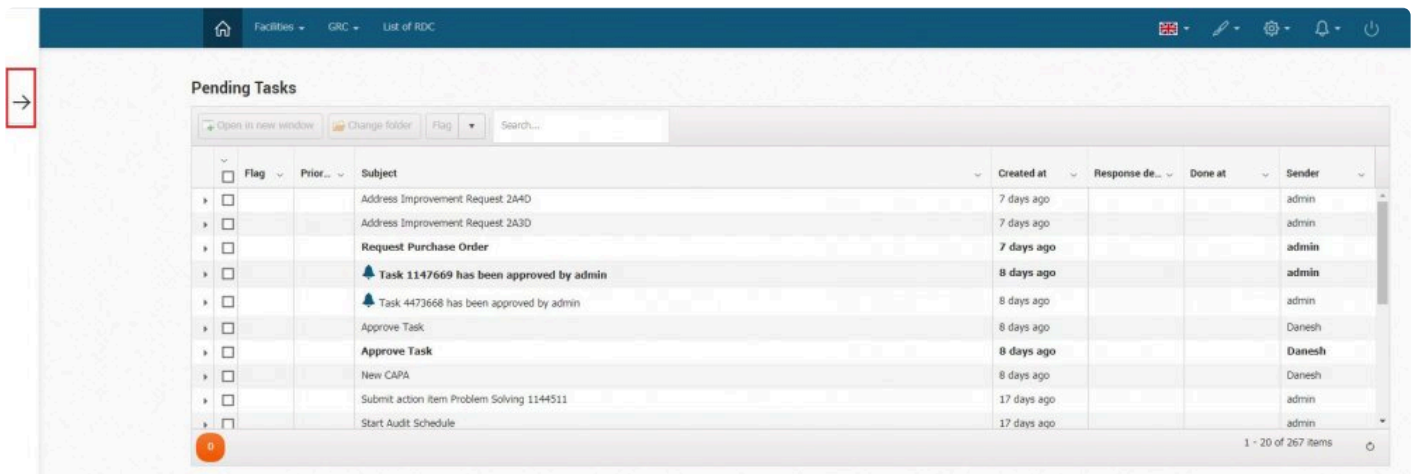
Admin has also the Audit Coordinator role. Tasks sent to the role and not the user will appear in the role’s task list.



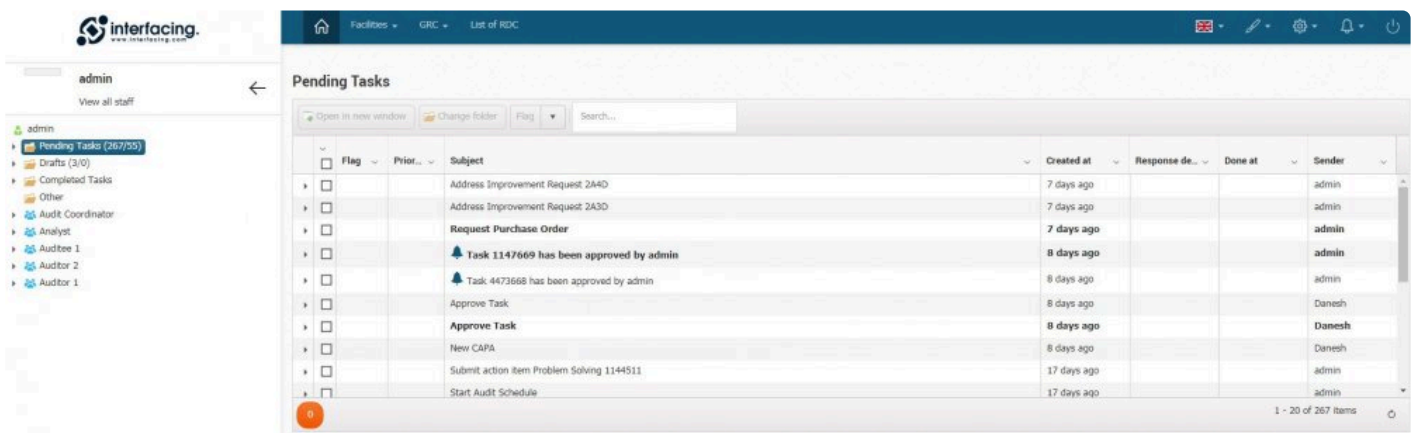
3.1 Task List Features

The Task List contains all of the tasks related to the user.

To expand the task list navigator, click on the arrow on the right hand side.



From here you can navigate to Pending Tasks, Drafts, Completed Tasks and custom task folders.



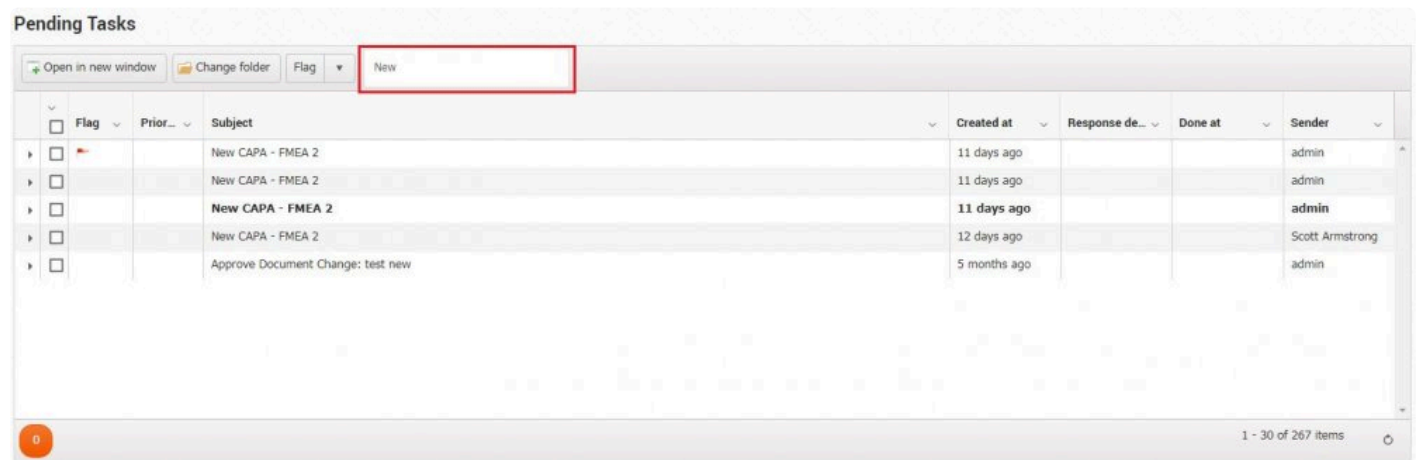
Task List Features:

- Search
- Column Customization
- Task Forwarding
- Timesheet
- Process History

- Task Label
- Flag
- Change Folder
- Open in new window

3.1.1 Search

The Search feature is located at the top of the task list:



Users can enter search values in the searchbox. Results will be filtered by:

- Subject
- Sender
- Starter User
- Staff User

You cannot search using dates or these following columns:


- Is Assignable
- Is By Graph History
- Is By Tree History

Search results will be updated as the user enters search values.

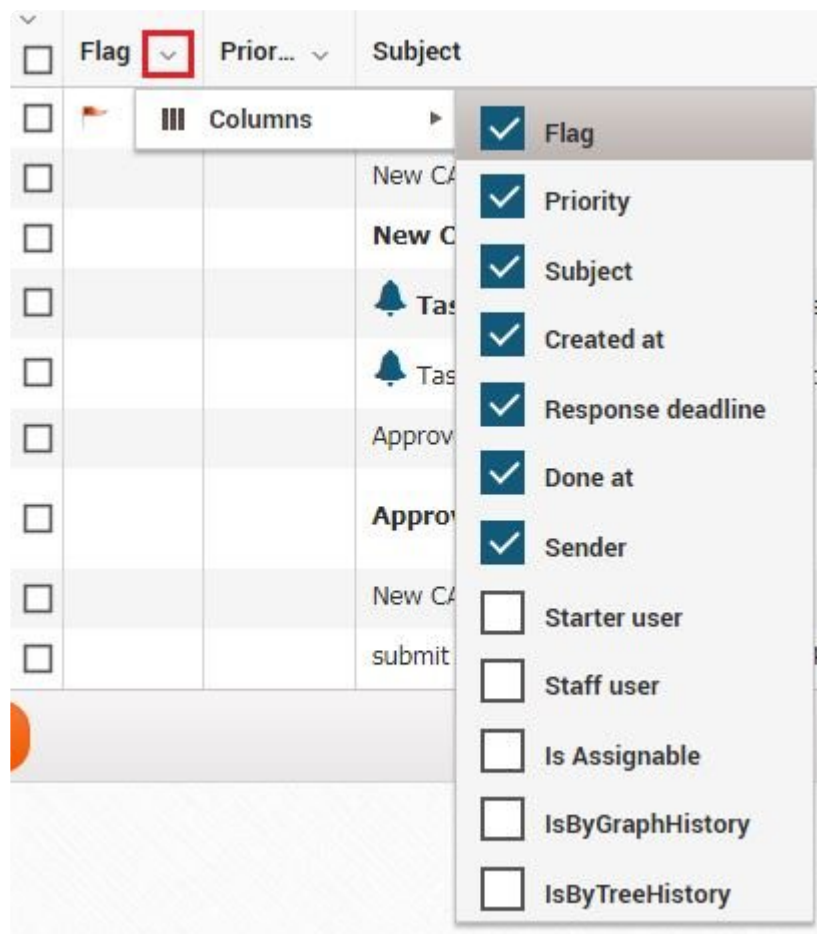
3.1.2 Column Customization

Column Settings

Users can add or remove columns to suit their preferences.

To select which columns to show and hide, select the  button next to any column header to expand the column settings.

By hovering over the Columns field, users will be able to show (check) or hide columns (uncheck)



Columns


The different columns available for display are:

- Flag
- Priority
- Subject
- Created
- Response Deadline
- Done at
- Sender
- Starter User
- Staff User
- Is Assignable
- IsByGraphHistory
- IsByTreeHistory

3.1.3 Task Forwarding

Access to Task Forwarding


The option to Forward Tasks must be enabled for that particular task when the application is designed in the DBP Designer.

To forward a task, click on the  button to expand the task in the task list. If task forwarding is enabled for that step of the process, users will be able to see a icon representing task forwarding

	Flag	Prior...	Subject	Created at	Response de...	Done at	Sender
	<input checked="" type="checkbox"/>		Schedule Audit	19 minutes ago			Audit System
<div>Tracking Code: 4437304</div> <div>Comment:</div> <div>Owner: Audit Coordinator</div> <div> Label</div>							

Forwarding a Task

To forward a task, click on the “Forward Task” icon . The form for forwarding tasks will be displayed.

forward 

Recipients **A**

☐ Use current description **B**
☐ Terminate current task **C**

Description **D**

Send

Letter	Item	Description
A	Recipients	The recipients who will receive the task
B	Use Current Description	Use the current description of the task
C	Terminate Current Task	Terminates the task
D	Description	A description of the the task that the recipient will also receive

A. Recipients

A task can be forwarded to multiple users. Note that once a task has been completed, it will be removed from the task list of other recipients. For example, if a task is sent to recipient A and recipient B, but recipient A completes the task before recipient B, the task will be removed from recipient B's task list.

B. Use Current Description

Checking this will will automatically send the task with the current description associated with the task. If this option is selected, the description text box will be disabled.

C. Terminate Current Task



Feature under development

D. Description

The sender can write a description which will be attached to the forwarded task.

3.1.4 Task List Timesheet

Timesheets in the task list function similarly to timesheets in the Facilities section. For more information, refer to [2.7.3 Timesheet](#). When a task is added from task list, its description is automatically filled using the task name.

There are 2 key difference between the Facilities timesheet and the Task List timesheet

Timesheet



Weekly Plan

<input type="text"/>				
	Start time	Finish time	A Remaining time	Description
Sunday, September 9, 2018				
	08:00	17:00		New CAPA - FMEA 2
Monday, September 10, 2018				
	08:00	17:00		Empty
Tuesday, September 11, 2018				
	08:00	17:00		Empty
Wednesday, September 12, 2018				
	08:00	17:00	00:30	Set Request
Thursday, September 13, 2018				
	08:00	17:00		audit
Friday, September 14, 2018				
	08:00	17:00		Empty
Saturday, September 15, 2018				
	08:00	17:00		Empty
< Previous Week Next Week Del + Add				

All current works

Date	Start time	Finish time	Remaining time	Description
Wednesday, September 12, 2018	08:00	17:00	00:30	Set Request

Letter	Component	Description
A	Remaining Time	The time remaining to complete a task
B	All Current Works	All tasks in progress/to be done that have a remaining time assigned



Remaining Time

Users can set the “Remaining Time” to complete a task.

All Current Works

All tasks in progress/to be done that have a remaining time assigned will be show in a tabular format.

Adding/Deleting a Task

To add a task, click on  Add . To delete a task, you must select the task in the main timesheet and NOT in the Current Works window, then click  Del

When adding a task in the Task List Timesheet, you will be able to specify the “Remaining Time”. Click on Save to exit the form and save the task.



Note that tasks that have a “Remaining Time” assigned will appear in the Current Works window for that particular task.

All current works				
Date	Start time	Finish time	Remaining time	Description
Wednesday, September 19, 2018	08:00	17:00	09:00	CompleteTask

3.1.5 Process History

Accessing Process History

Process history allows users to view information about their task and the tasks or events that were executed before they received the task.

To access process history, expand the task by clicking the  icon. Click on the process history icon  to open up the process history form

Process History Form

The process history form displays information about previous and current tasks.

Column	Description
Status	The name of the task in the process
Event	The event associated with the task
User	The user who sent/initiated the task
Job Position	The user's role, if there is one assigned
Job Title	The name of the task in the task list
Responsible	The user responsible for completing the task
Task Start Date	The date the task was initiated
Task Finish Date	The date the task was completed
Folder Name	The location of the task
Forward – Assign	The user to whom the task was forwarded to

3.1.6 Task Label


Accessing Task Labels

Task labels allows users to include add a label or description to the task. When a task is forwarded, the user has to option to use the pre-existing label/description or enter a new one. Click [here](#) for more information on task forwarding.

Tasks can also be pre-defined by the application designer. When a task is sent, it will have a label already defined. Common uses for this field include adding a description and the tracking code for that task.

Editing Task Labels

To access and edit task labels, expand the task by clicking the  icon.

To edit a label, click on the  icon in the expanded task. Click on the textbox to enter some text. When you are done editing, click outside the box to save your text.



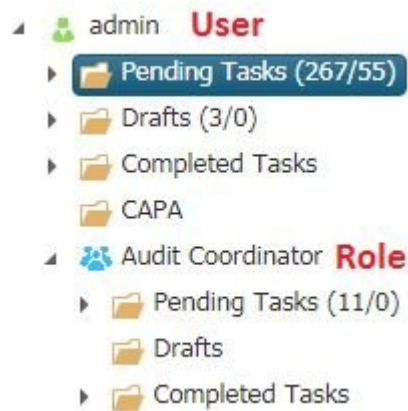
* If no label has been defined when designing the application, the label will default to "Label"

3.2 Task Folders

Task Folders are a way to classify and organize tasks.

Resource and Role Groups

Folders are separated into 2 groups: user folders and role folders. A resource refers to the user, while a role refers to a job title associated with an user. The DBP allows for roles to be linked to resources. Applications within the DBP can be designed set up so that tasks are sent to resources (meaning the user) or to roles.



In the example above, tasks can either be organized by resource or by role, depending on the workflow of the application. (e.g. If an audit app sends tasks to Audit Coordinators, the workflow tasks will be located in the Audit Coordinator's task list).

There are 3 default folders:

- Pending Tasks
- Drafts
- Completed Tasks

Pending Tasks

Tasks that have been not yet opened and addressed


Drafts

Tasks that been opened and saved but not submitted will be moved from the Pending Tasks folder

Completed Tasks

Tasks that have been completed

3.2.1 Custom Folders

 Coming Soon

4.0 Tracking

The DBP offers the ability to generate default or customized tracking codes to allow users to track tasks within a process.

* The tracking option must be enabled in the designer.

This section is comprised of:


- [4.1 Obtaining a Tracking Code](#)
- [4.1 Tracking a Task](#)

4.1 Obtaining a Tracking Code

When submitting task, users will get a notification containing a tracking number.

Alternatively, users can navigate to their task list and get the tracking code from the task details.

To obtain the tracking code from the task list:

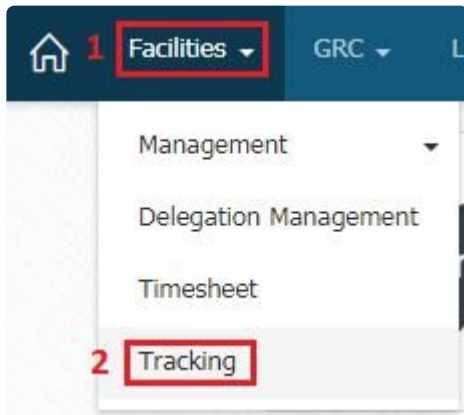
1. Navigate to the folder where the task is
2. Click on  to expand the task details
3. The tracking code will be present in the label/description of the task

	Flag	Prior...	Subject	Created at	Response de...	Done at	Sender
			Review Audit Results	2 minutes ago			John Doe
<div> Tracking Code: 1413306 Comment: To complete before 2018-09-06 Owner: Audit Coordinator  Label</div>							

Tracking codes are shareable. Any user can track any task.

4.2 Tracking a Task

To access the tracking feature:



1. Navigate to “Facilities” on the top menu
2. Select “Tracking” the menu

The tracking page allows you to track any task by entering a tracking number

Clicking on “Tracking” will display at which stage/level of the process the task is currently at.



Clicking on “History” will display the history of the entire process up until that task.

Tracking



Process History



Status	Event	User	Job Position	Job title	Responsible	Task start date	Task finish date	Folder name	Forward - Assign
▼ Submit		Kevin T	...	Assess Availability	Eduard H	9/5/2018 3:31 PM	9/5/2018 3:32 PM	Completed	
▼ Schedule Audit		Kevin T	...	Assess Availability	Eduard H	9/5/2018 3:31 PM	9/5/2018 3:32 PM	Completed	
▼ Initiate Audit	Submit	Kevin T	...	Start Audit Instance	Eduard H	9/5/2018 3:32 PM	9/5/2018 3:32 PM	Completed	
○ Record Audit Results	Submit	Kevin T	...	Record Sample Results	Eduard H	9/5/2018 3:32 PM	...	Pending	

For more information on process history, click [here](#)

5.0 Applications

This section outlines the features and functionalities within the DBP applications.

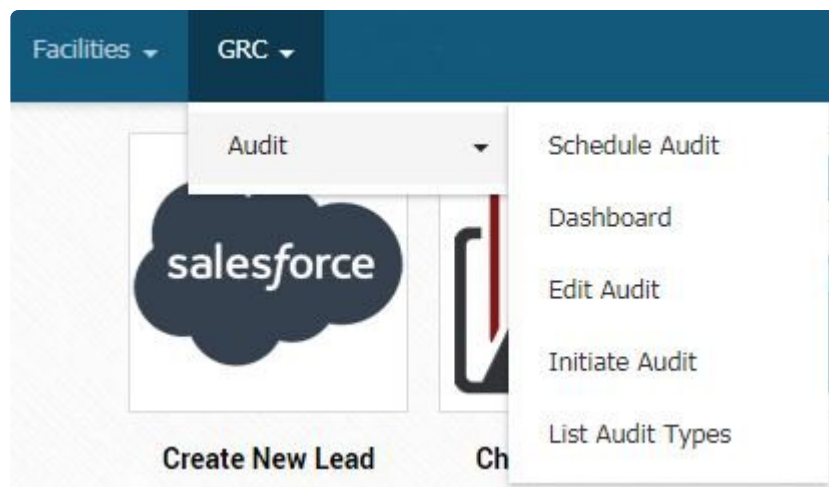
5.1 Accessing Applications

For information on general navigation, see the section on [Navigating to Applications](#)

Applications are developed using the Digital Business Platform Designer, they are then deployed to the web where users are able to use it. Organization of the applications is decided by the designer. Applications can be accessed either via the menu bar from anywhere in the web application, or accessed via the home page.

Menu Bar

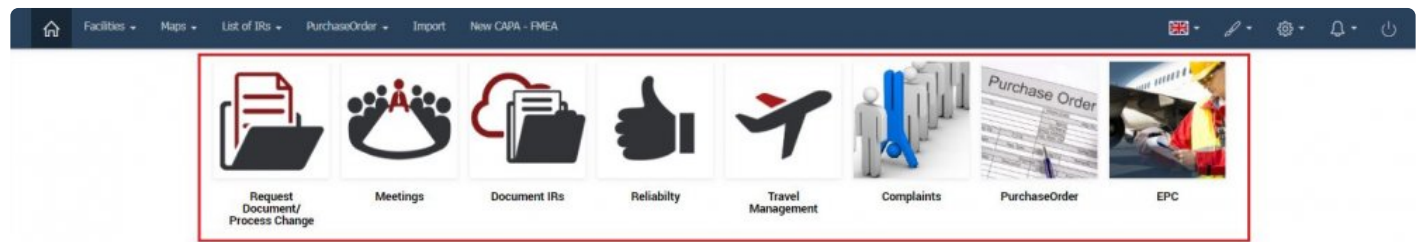
Applications appearing on the menu bar can be accessed directly from anywhere in the web application. Applications can be organized and separated into different folders in the menu bar. The organization of the applications is decided by the developer of the application in DBP Designer.



In the example above, applications can be nested into folders.

Home Page

Applications can also be placed as tiles in the user's home page.



Applications appearing on the home page can only be accessed through the home page. Similarly to applications in the menu bar, they can be organized and separated and nested into different folders.

