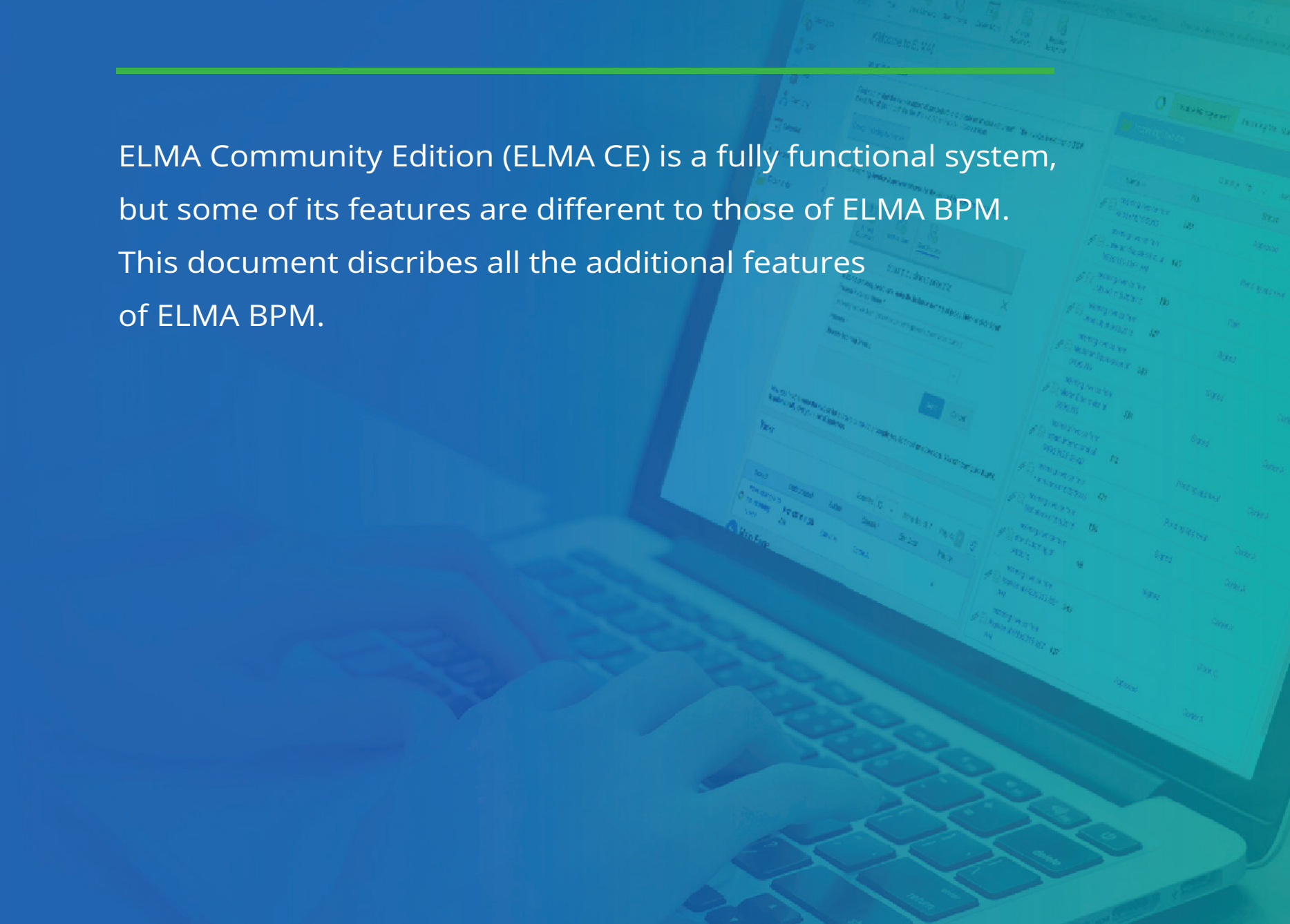
Business Process
Management Software

Features and capabilities of ELMA BPM

ELMA Community Edition (ELMA CE) is a fully functional system, but some of its features are different to those of ELMA BPM. This document discribes all the additional features of ELMA BPM.



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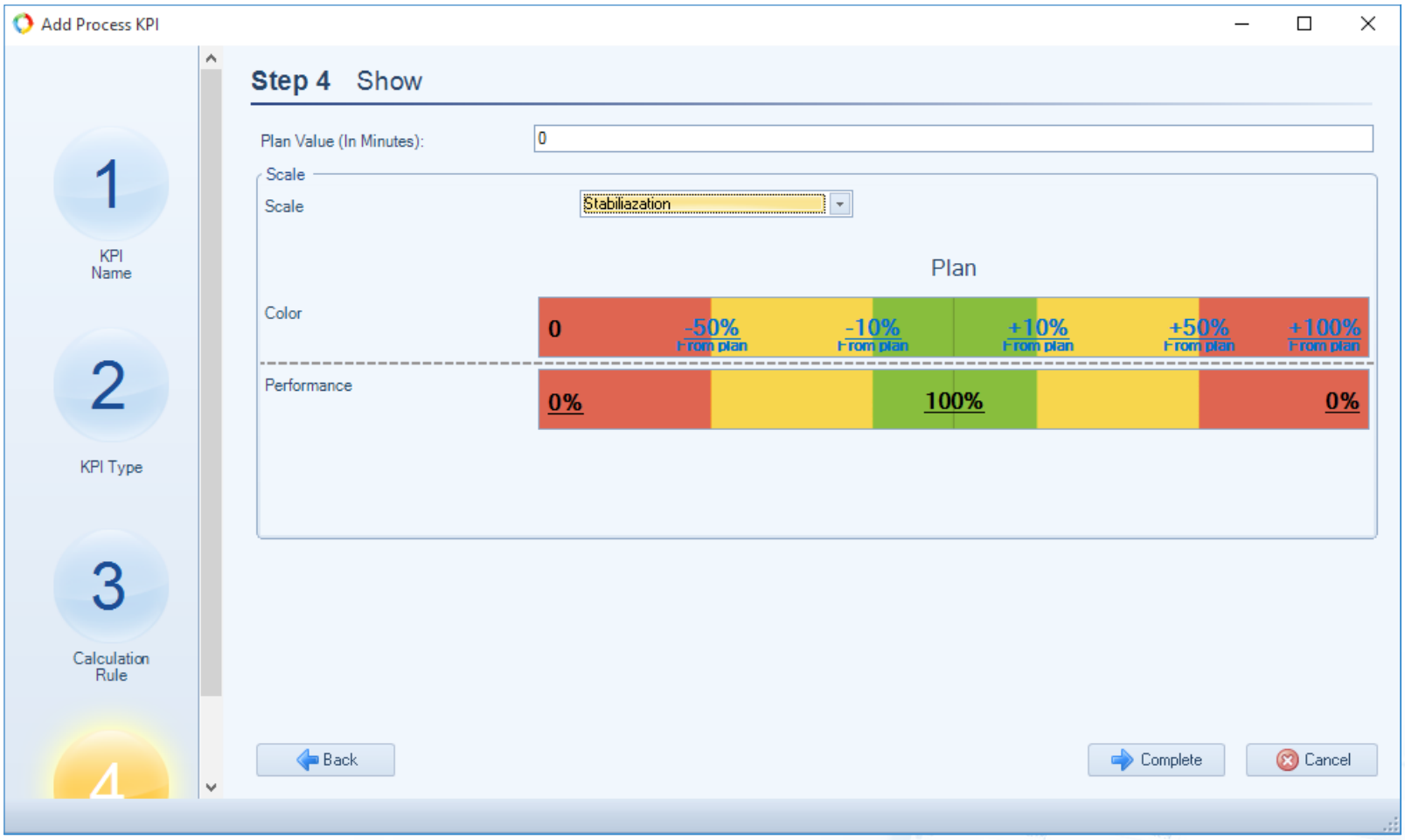
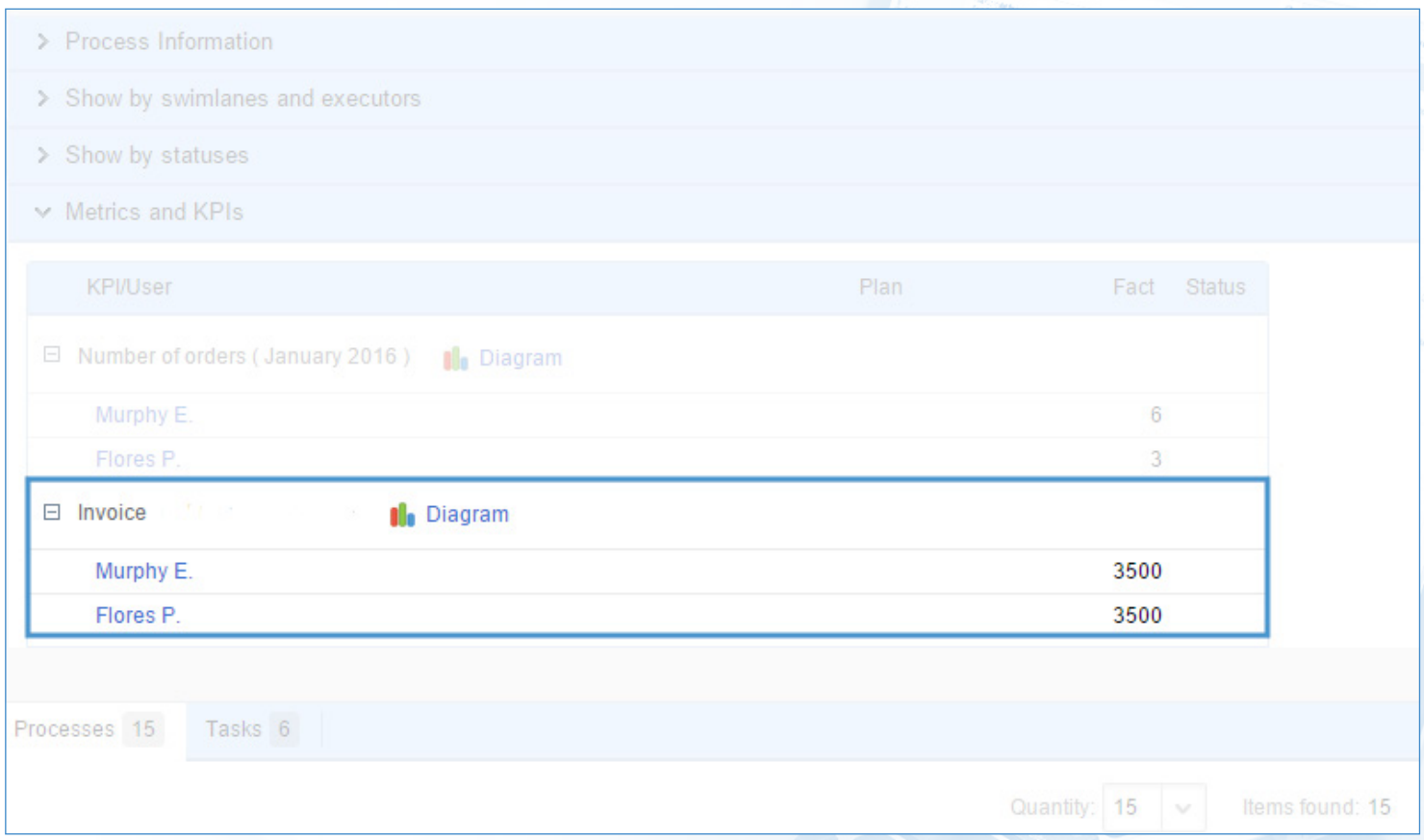
BPM AND WEB PORTAL

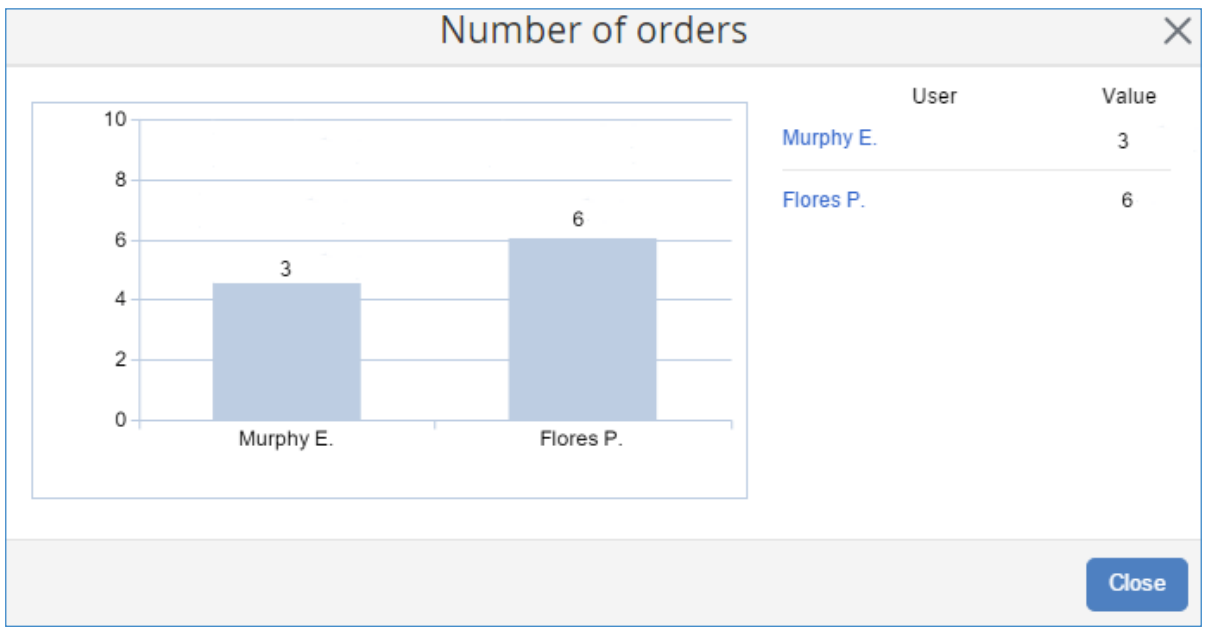
Measuring Metrics and Process Indicators

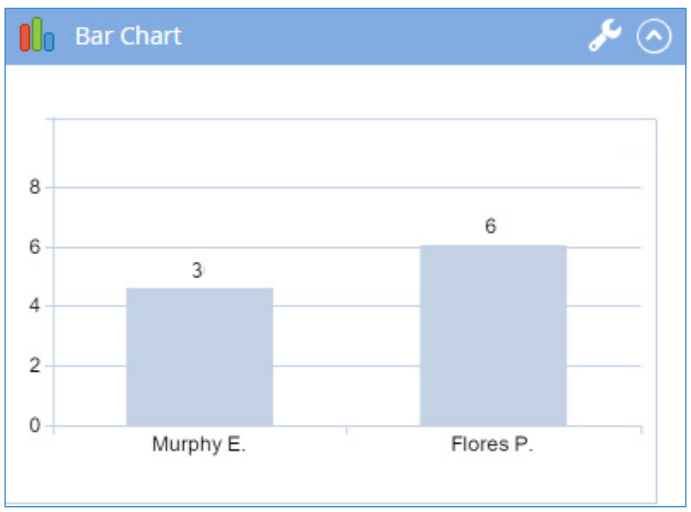
Metrics and process KPIs allow you to measure and evaluate performance at a certain process step according to such parameters as variables or process execution time. The values of the metrics and KPIs can be displayed as a bar chart for better visualization.

Moreover, in ELMA BPM, the Process Monitor is more informative than in the Community edition. It allows you to monitor all the important process KPIs in one place. There are special color indicators that demonstrate the status of a process or a process instance. If any irregularities appear, you can react immediately and take timely actions.









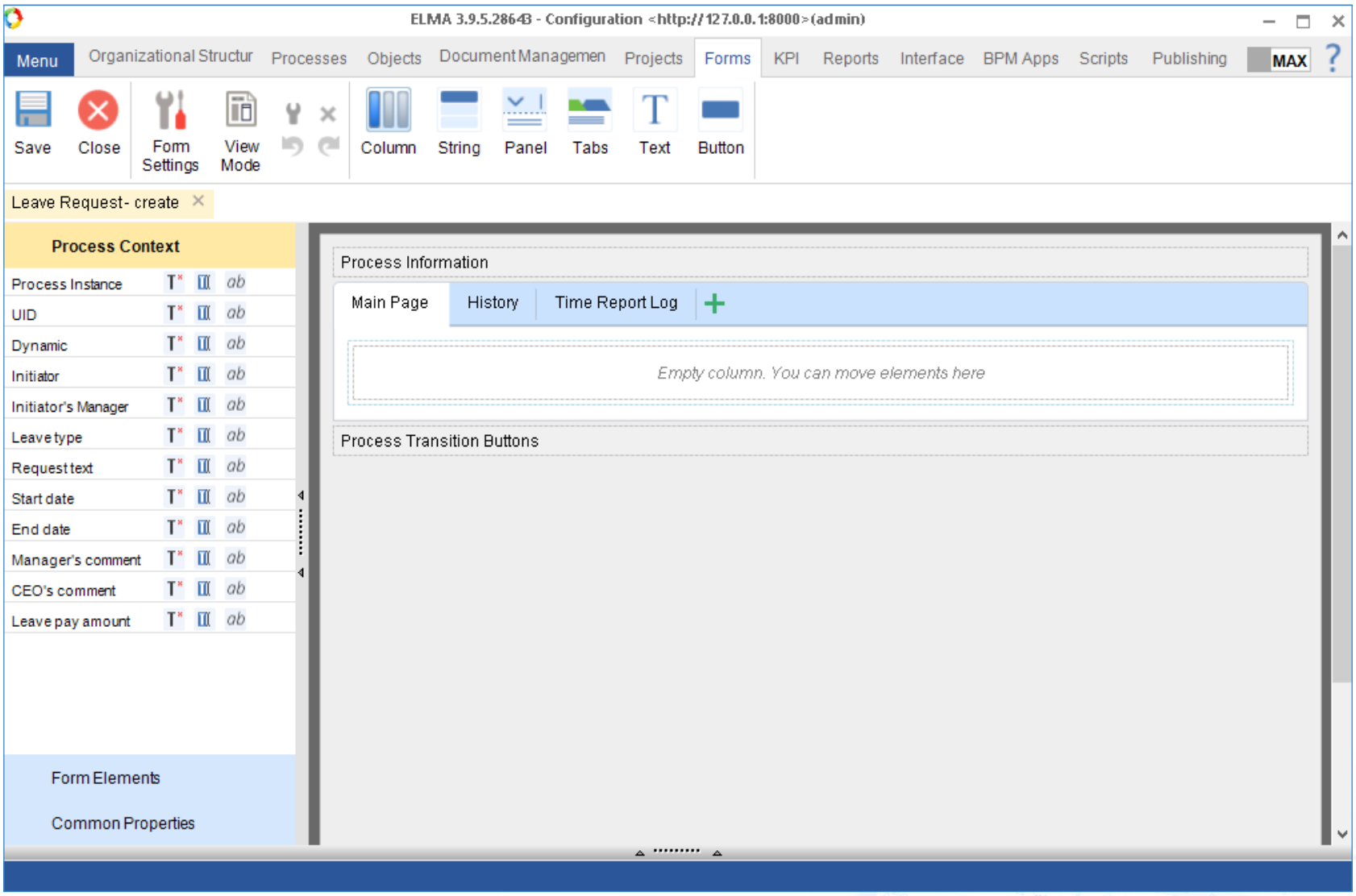
Processes 10 | Tasks 3

Quantity 15 | Items found: 10 | Pages: 1

Instance Name	Responsible	Start Date	Map	Current Tasks, Operations and Sub-Processes	Process Instance Status
~~Request for Regular Paid Leave, 8/30/2015 to 9/5/2015 from Nelson James~~	Nelson J.	8/25/2015 3:47 PM	Map	<No current operations>	Approved
Request for Unpaid Leave, 8/25/2015 to 8/25/2015 from Administrator ELMA	Administrator	8/25/2015 12:10 PM	Map	Pass Request to HR Department (Administrator)	Approved
~~Request for Regular Paid Leave, 8/25/2015 to from Administrator ELMA~~	Administrator	8/25/2015 10:43 AM	Map	<No current operations>	Rejected
~~Request for Regular Paid Leave, 8/30/2015 to 8/31/2015 from Administrator ELMA~~	Administrator	8/25/2015 10:08 AM	Map	<No current operations>	Rejected
~~Request for Regular Paid Leave 9/1/2015 to 9/15/2015 from Nelson James~~	Nelson J.	8/24/2015 4:35 PM	Map	<No current operations>	Approved
Regular paid leave from 12/10/2015 to 12/27/2015	Brown O.	8/24/2015 2:28 PM	Map	Fill in Leave Request Form (Brown O.)	
~~Regular paid leave~~	Bailey F.	8/24/2015 2:09 PM	Map	<No current operations>	
~~Regular paid leave from 8/31/2015 to 9/07/2015~~	Brown O.	8/23/2015 1:11 PM	Map	<No current operations>	Approved
~~Request for unpaid leave 8/25/2015~~	Brown O.	8/22/2015 12:17 PM	Map	<No current operations>	
Request for unpaid leave 2 hours 8/25/2015	Administrator	8/21/2015 12:00 PM	Map	Approve Leave Request (Brown O.)	Pending Approval

Form Builder for Interface Modeling

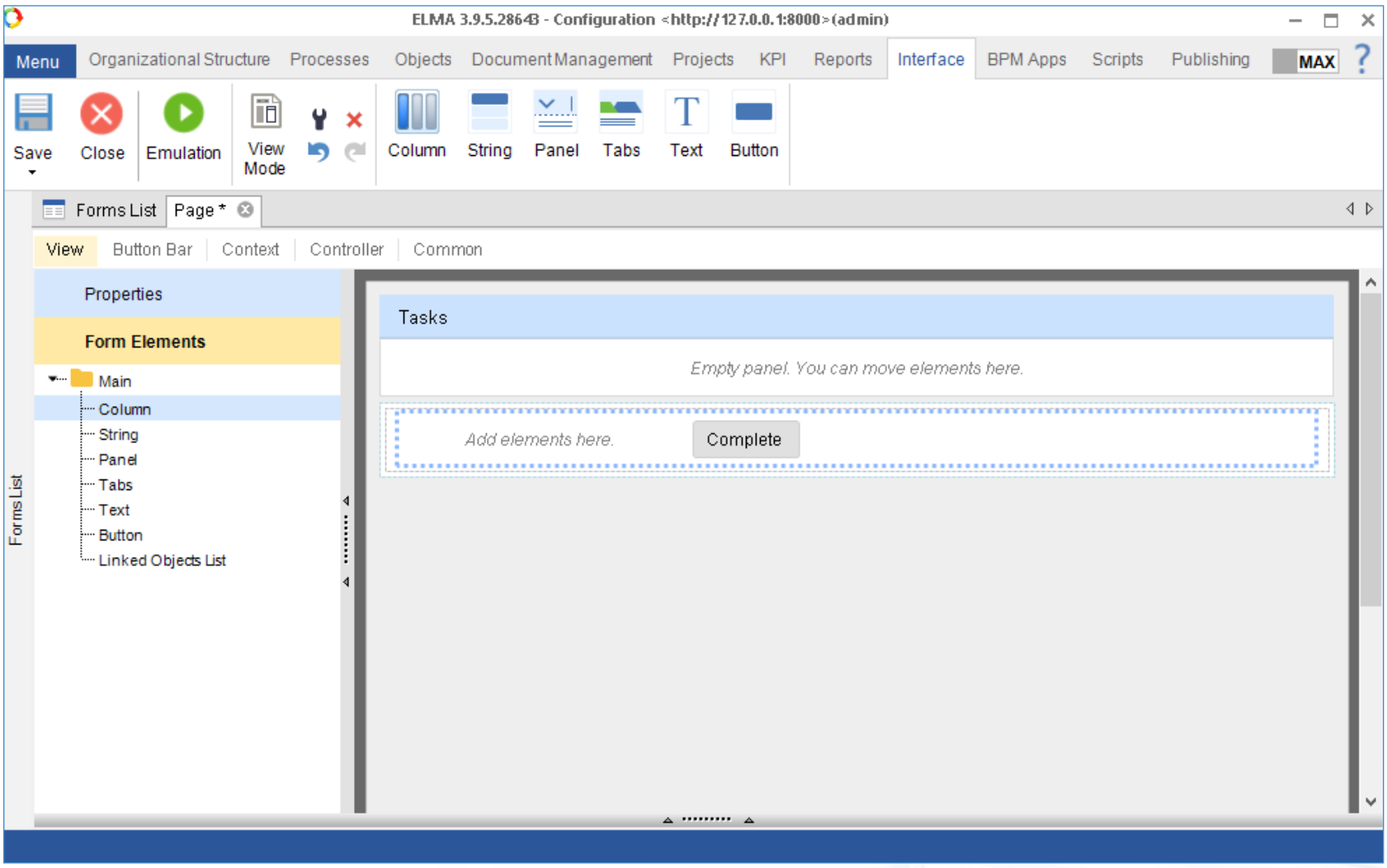
Every system interface must be understandable and user-friendly. When designing business processes, it is important to be able to adjust the view forms for different system objects. For that, we have created Form Builder. In Form Builder, you can adjust the interface and make any page look better. Use the drag-n-drop feature to arrange elements on the form.

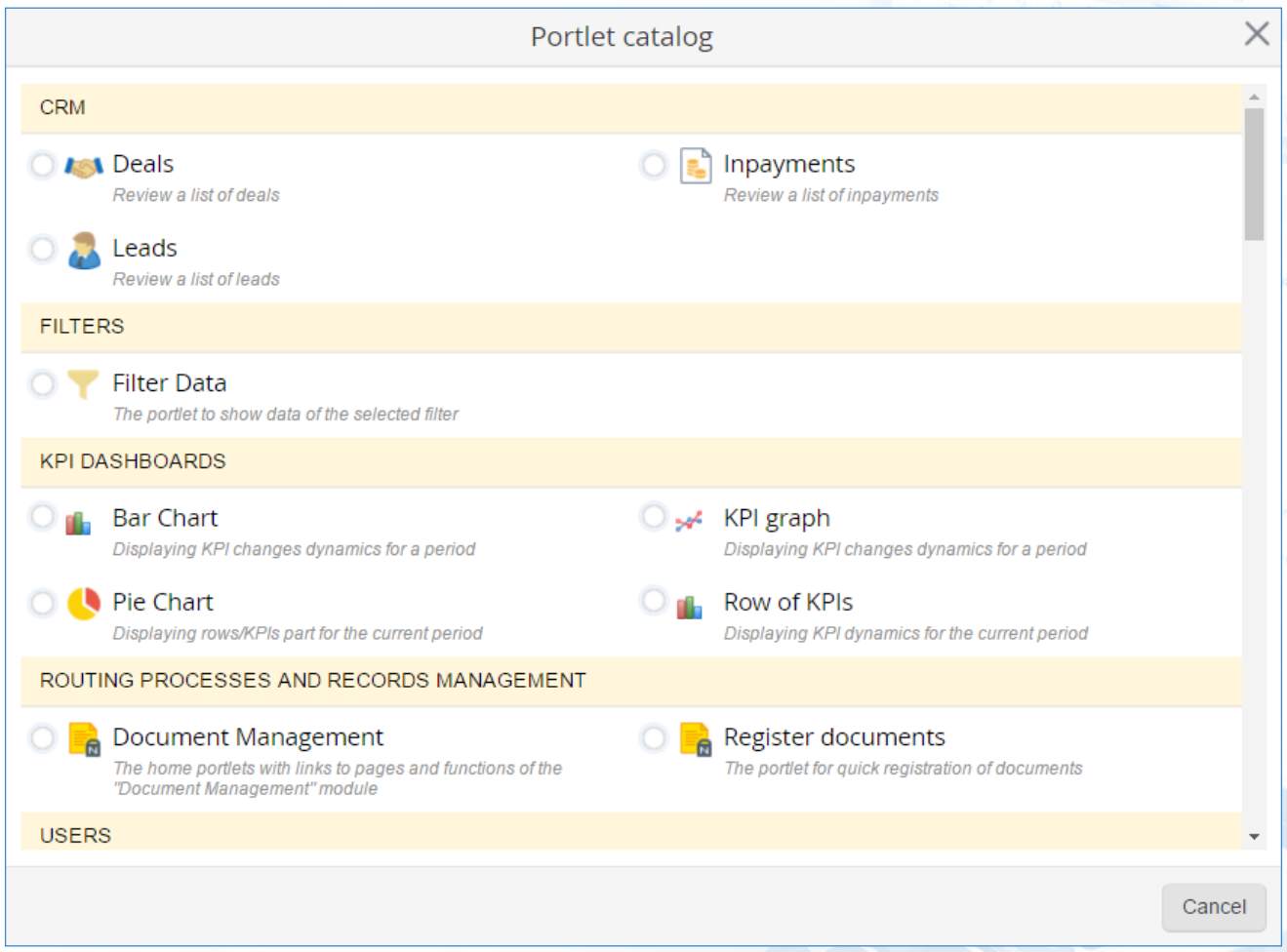


Modeling New Interfaces in ELMA Designer

In ELMA Designer, you can create and modify user interfaces according to specific requirements. You can create portlets and pages in the standard form maker or use Razor markup.

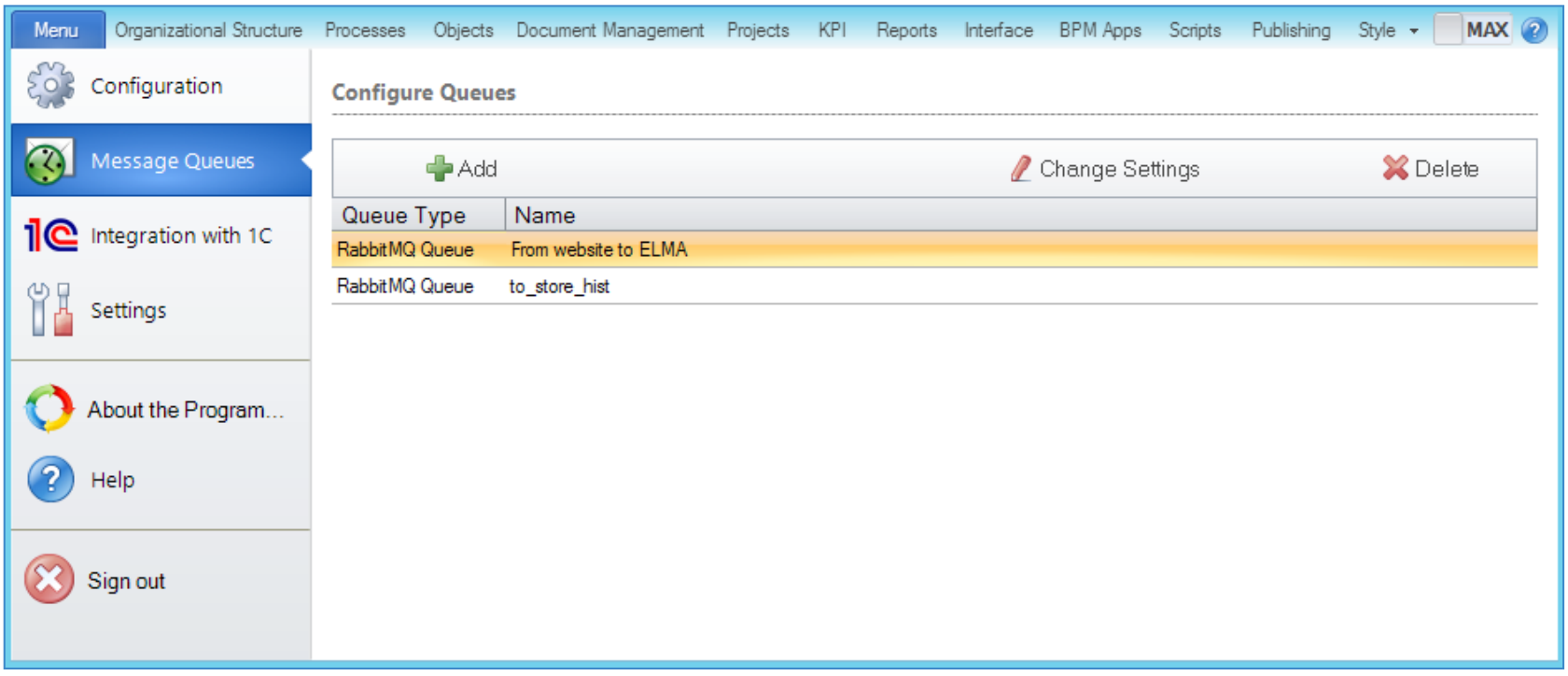
The new portlets and pages become available to the users right after being published.

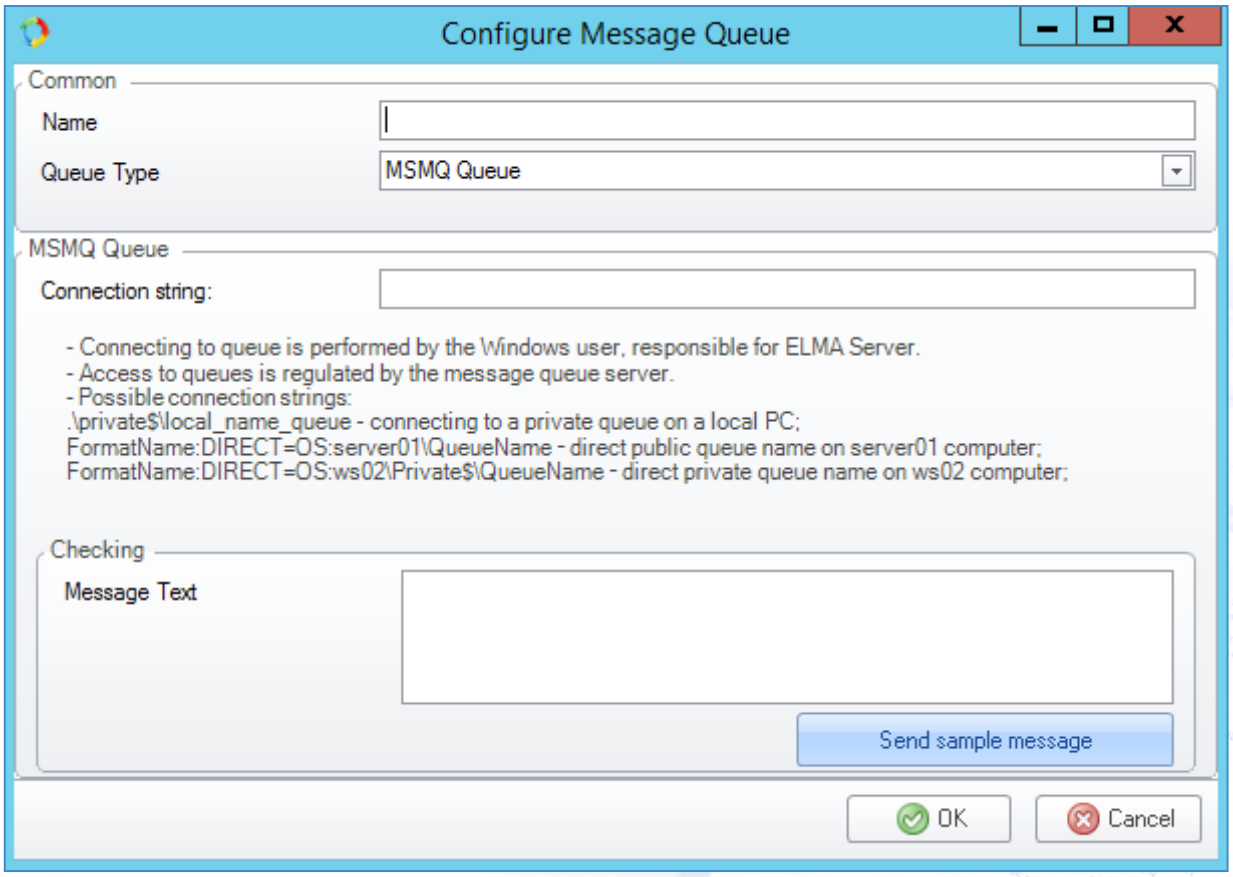


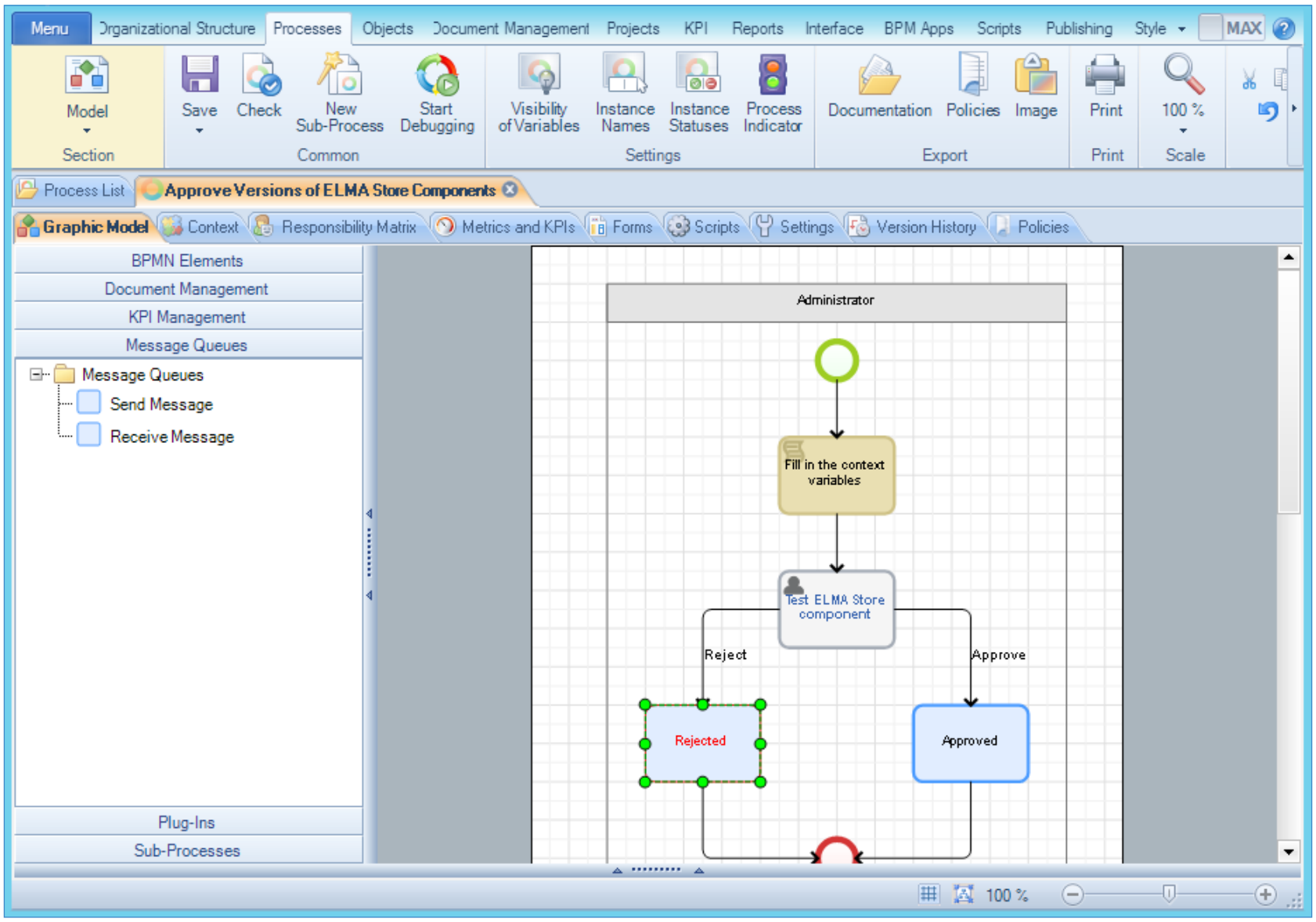


Integration with Data Buses

When building failure-tolerant systems, it is important to ensure proper communication of data through data buses. For that purpose, ELMA features message queues (RabbitMQ, MSMQ, JMS). They collect messages from different programs and put them in queues for sending, sorting and distributing.



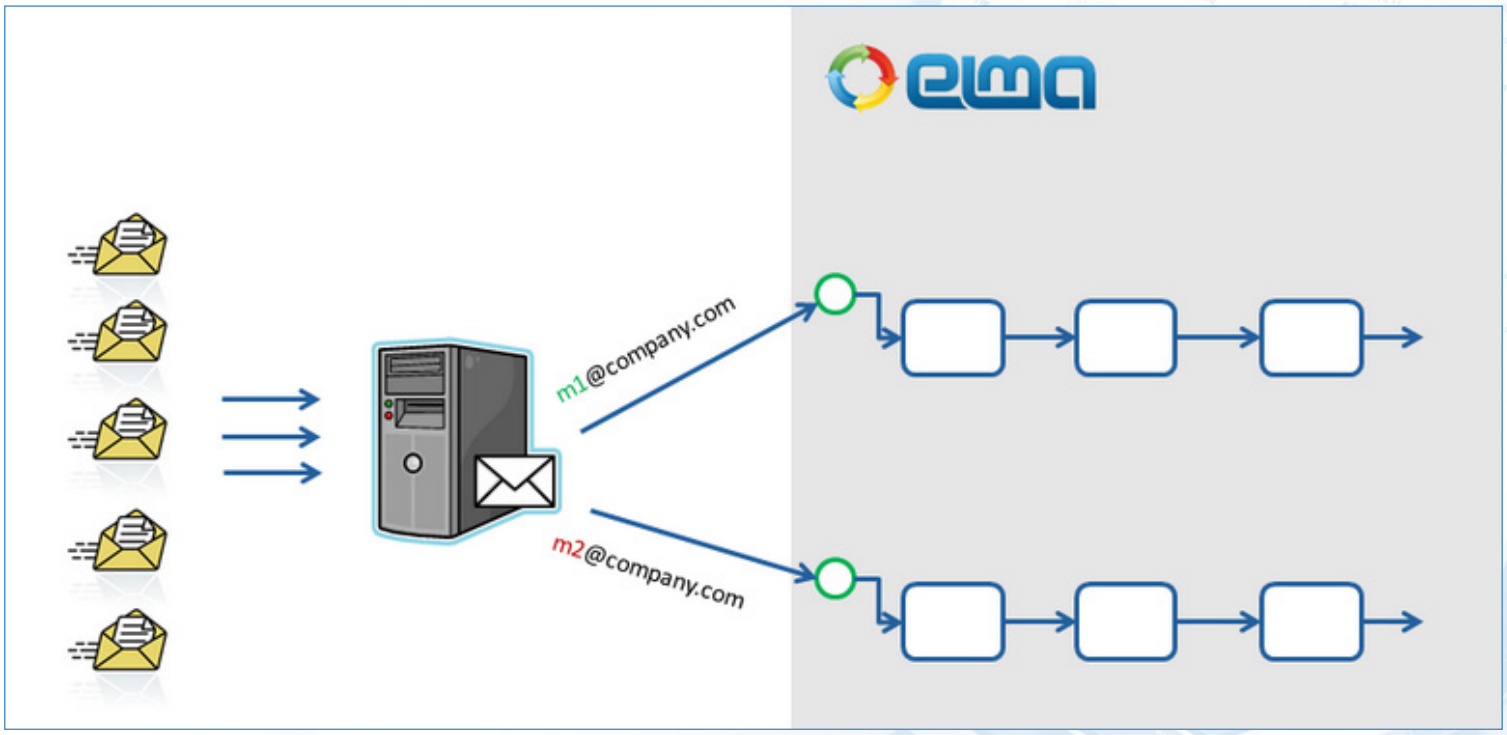




Additional Tools for Fast Integration

ELMA BPM easily integrates into a typical IT system of a company. Any process can be published with a web service and an activation link. This way you can align business processes with any events that happen in other IT systems.

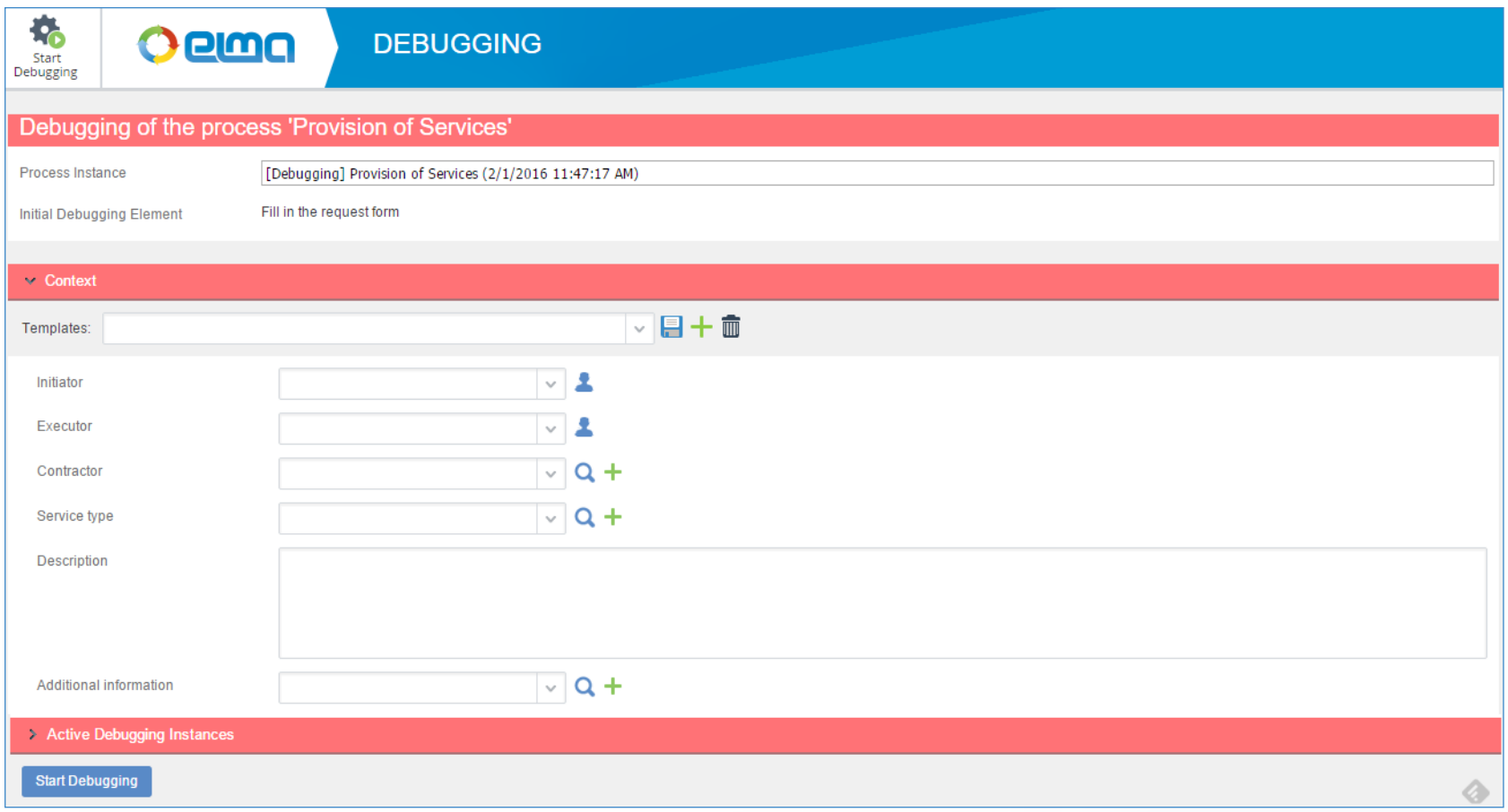
For example, a process can start when a new e-mail is received. This e-mail message can be processed within the business process.



Process Debugging

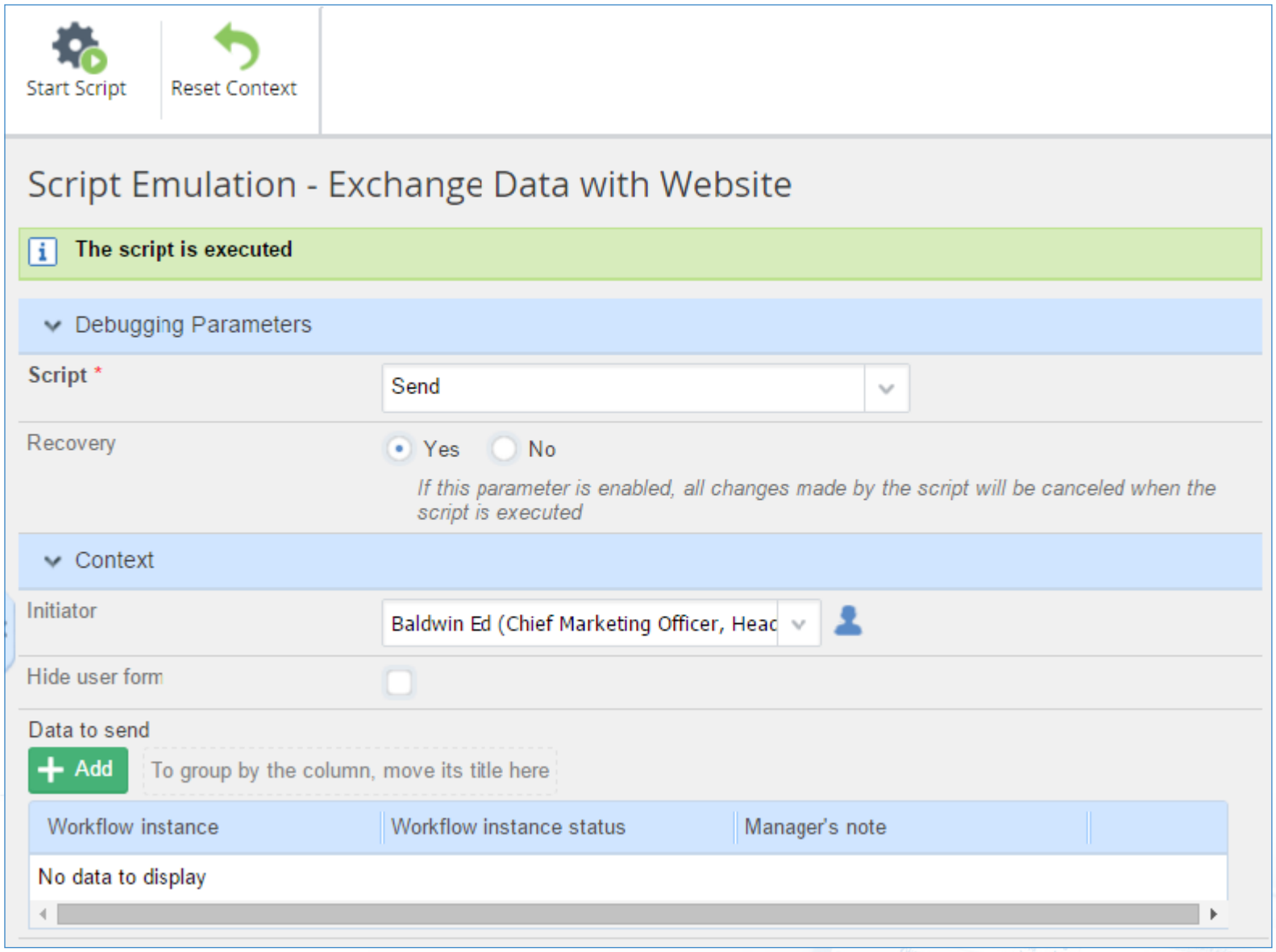
Before a designed process can be used in Web Application, you need to make sure the process model is correct. In ELMA BPM, this is done by means of the checking and debugging features.

By checking a process, you can verify if there are any logic errors. By debugging the process, you verify the view forms and check how the process performs with different variable values. You can start process debugging on any step of the process and not necessarily from the very beginning.



Script Emulation

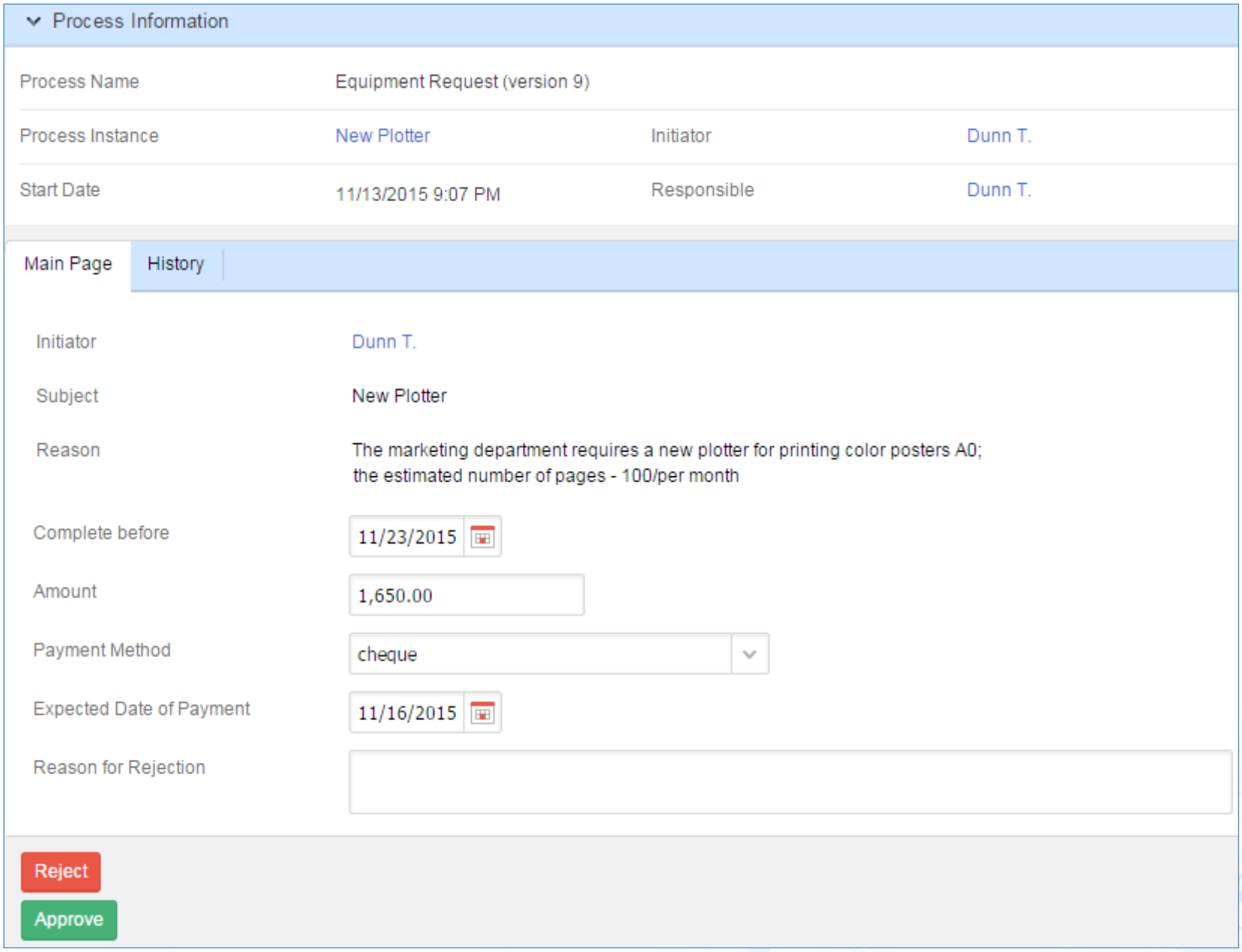
Script emulation is an important part of process modeling. It allows you to verify if a script works as expected and see how it functions with different context variables.



Creating Flexible Task Forms

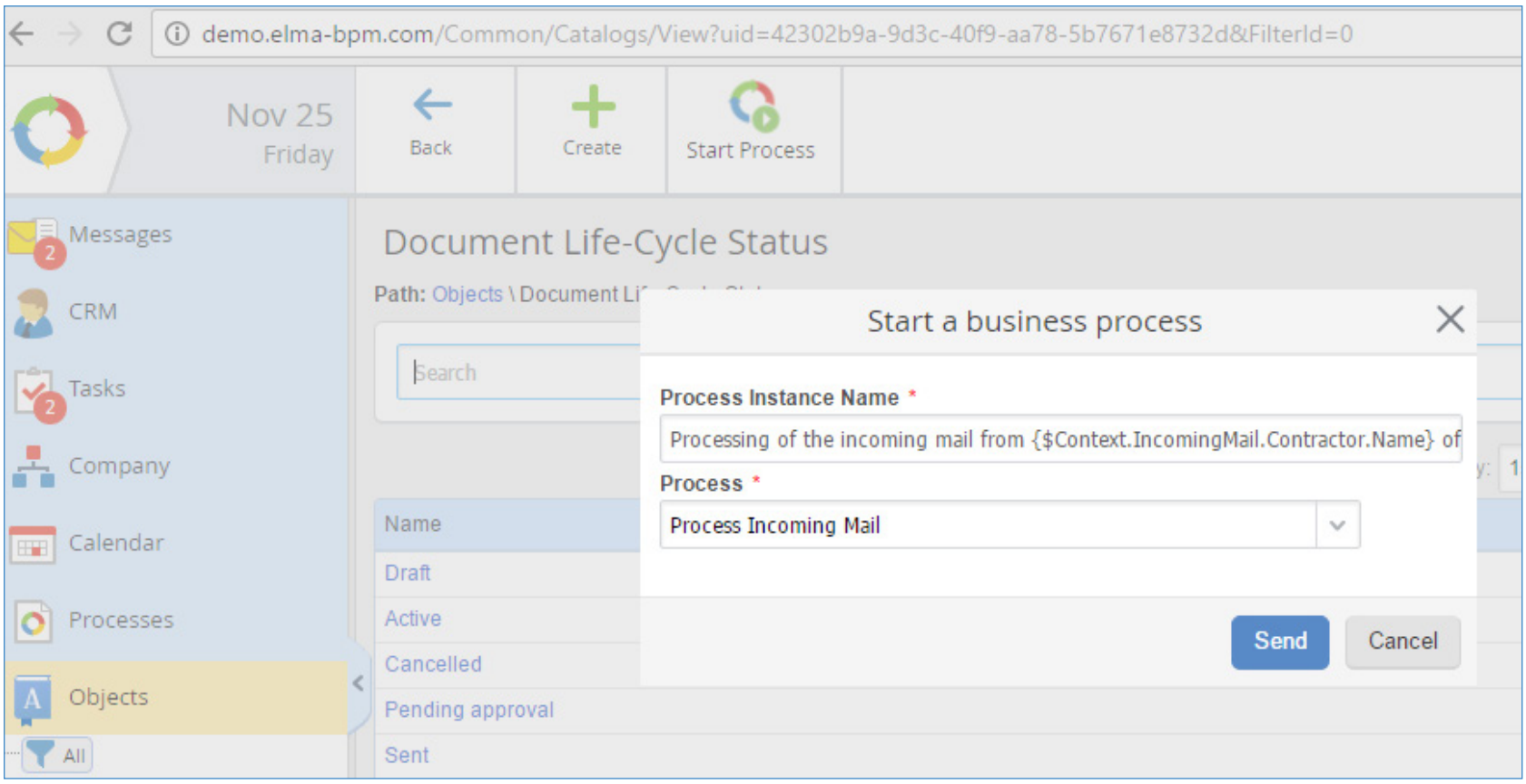
In ELMA BPM, you can create flexible and convenient dynamic task forms.

The task forms are created when the process model is designed, so you cannot know beforehand what the form will look like eventually. Dynamic task forms are very flexible and, therefore, allow you to create convenient solutions.



A Wider Use of Processes

In ELMA BPM, it is possible to link processes to various system objects. Business processes can be started from the page of an object that you added to extend the system. For example, you can create a “Document Life-Cycle Status” object and design several processes where the status is an input variable. Then you can start these processes right from the object page.

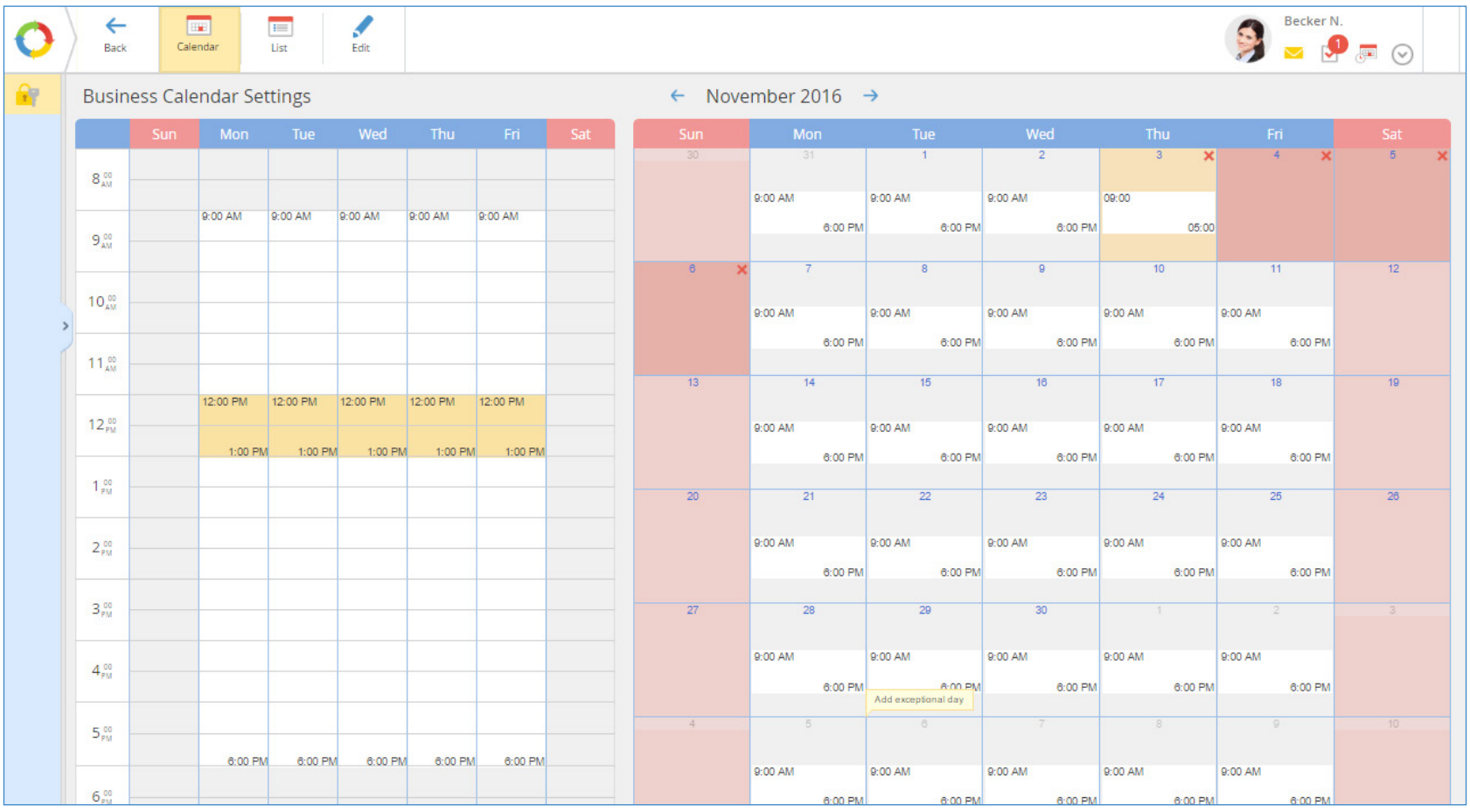


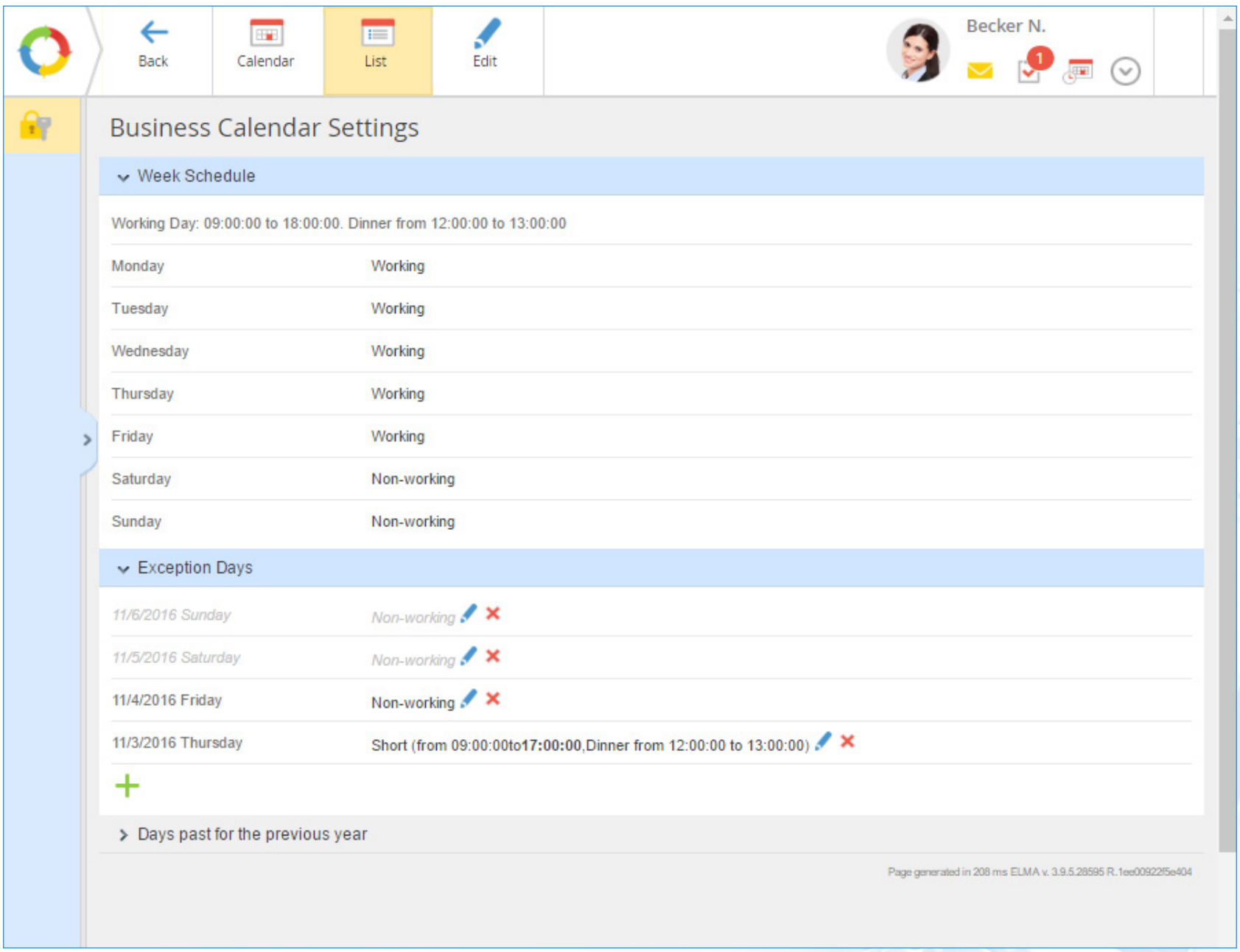
Flexible Settings of the Business Calendar

In ELMA BPM, the Business Calendar is more flexible than in the Community editions: you can configure exceptions and days off.

Calendar settings are global system rules. It means that all the tasks, processes and calendars work according to the working hours specified in the Business Calendar.

Moreover, Business Calendar settings have convenient display modes. It can display a working week as a calendar or as a list.


Back
Calendar
List
Edit
Becker N.
Business Calendar Settings
November 2016
Sun
Mon
Tue
Wed
Thu
Fri
Sat
Add exceptional day


Back
Calendar
List
Edit
Becker N.
Business Calendar Settings
Week Schedule
Working Day: 09:00:00 to 18:00:00. Dinner from 12:00:00 to 13:00:00
Monday Working
Tuesday Working
Wednesday Working
Thursday Working
Friday Working
Saturday Non-working
Sunday Non-working
Exception Days
11/6/2016 Sunday Non-working
11/5/2016 Saturday Non-working
11/4/2016 Friday Non-working
11/3/2016 Thursday Short (from 09:00:00to17:00:00,Dinner from 12:00:00 to 13:00:00)
Days past for the previous year
Page generated in 208 ms ELMA v. 3.9.5.28595 R.1ee00922f5e404

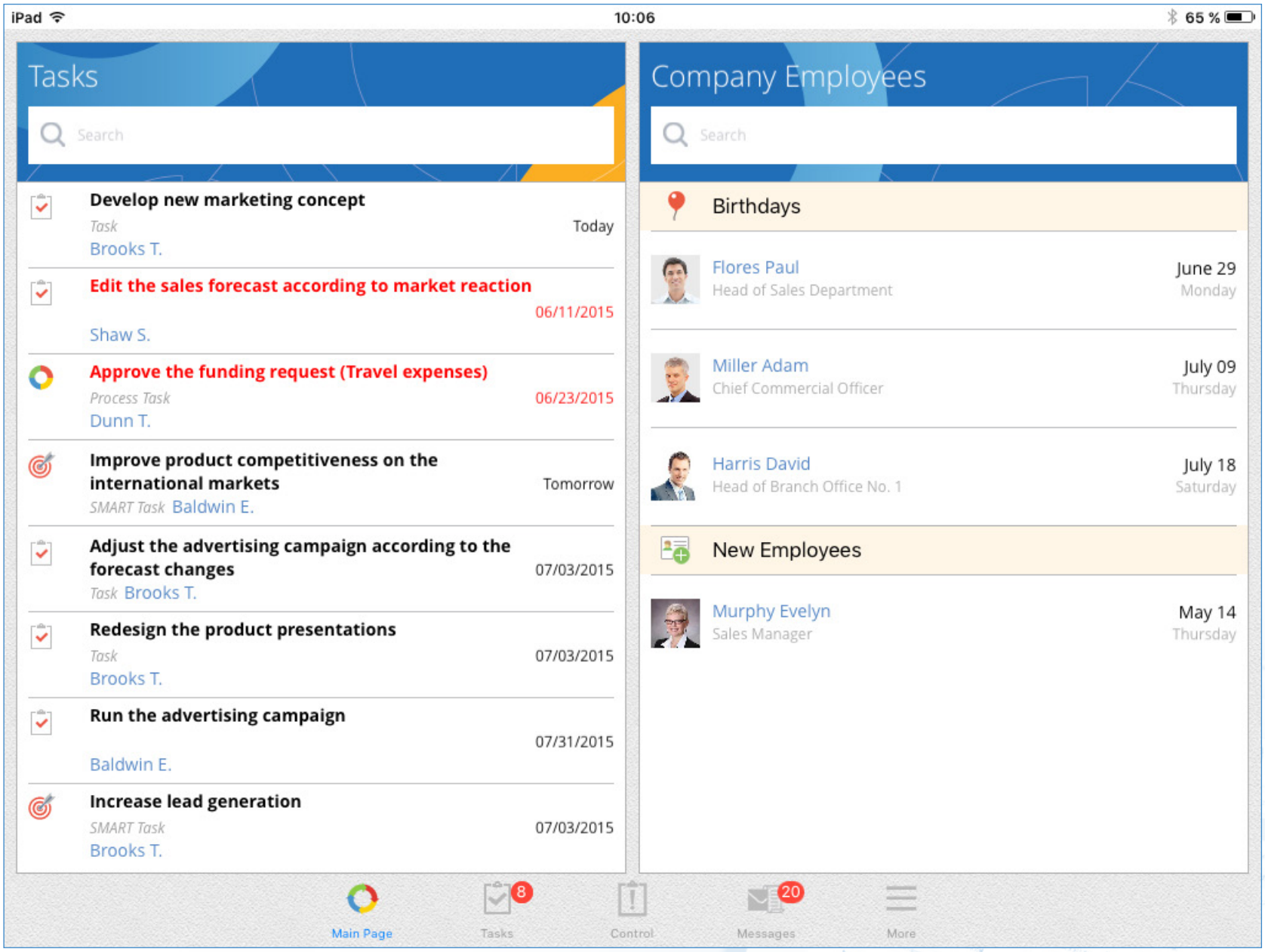
Mobile Applications

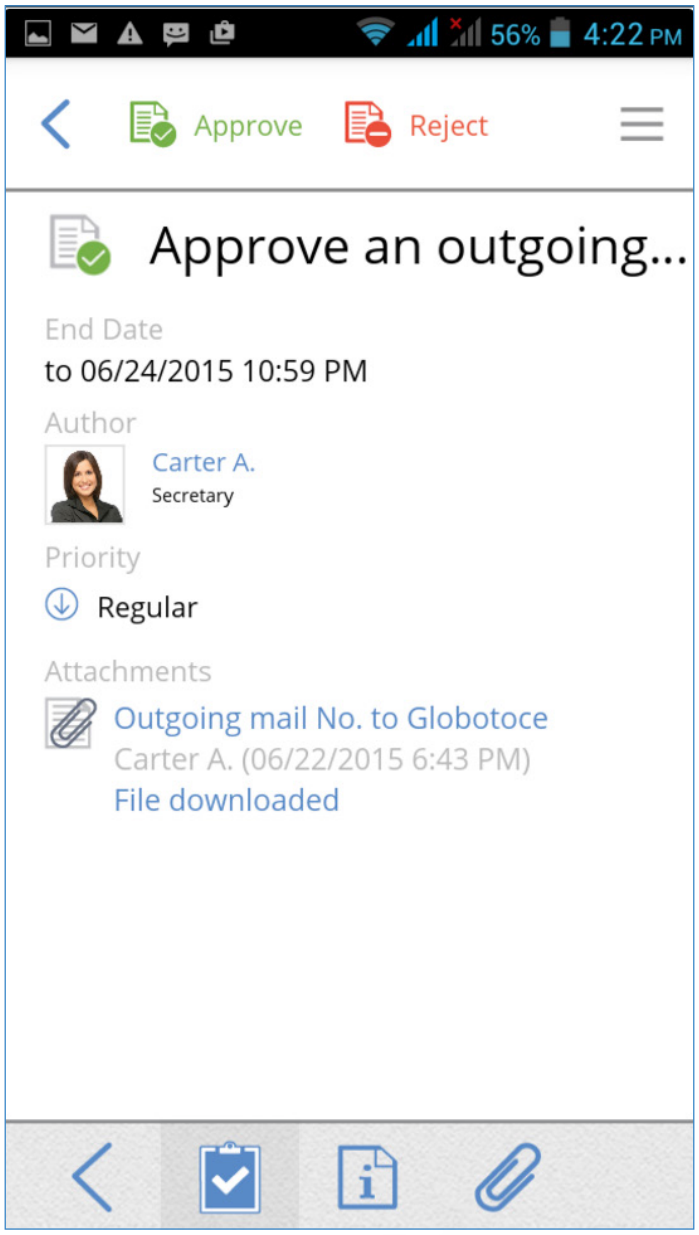
Mobile application for ELMA BPM allows you to work in the system regardless of place and time. Whether you are at the office, on the road or at home, you can access the system from whichever device you find more convenient at the moment.

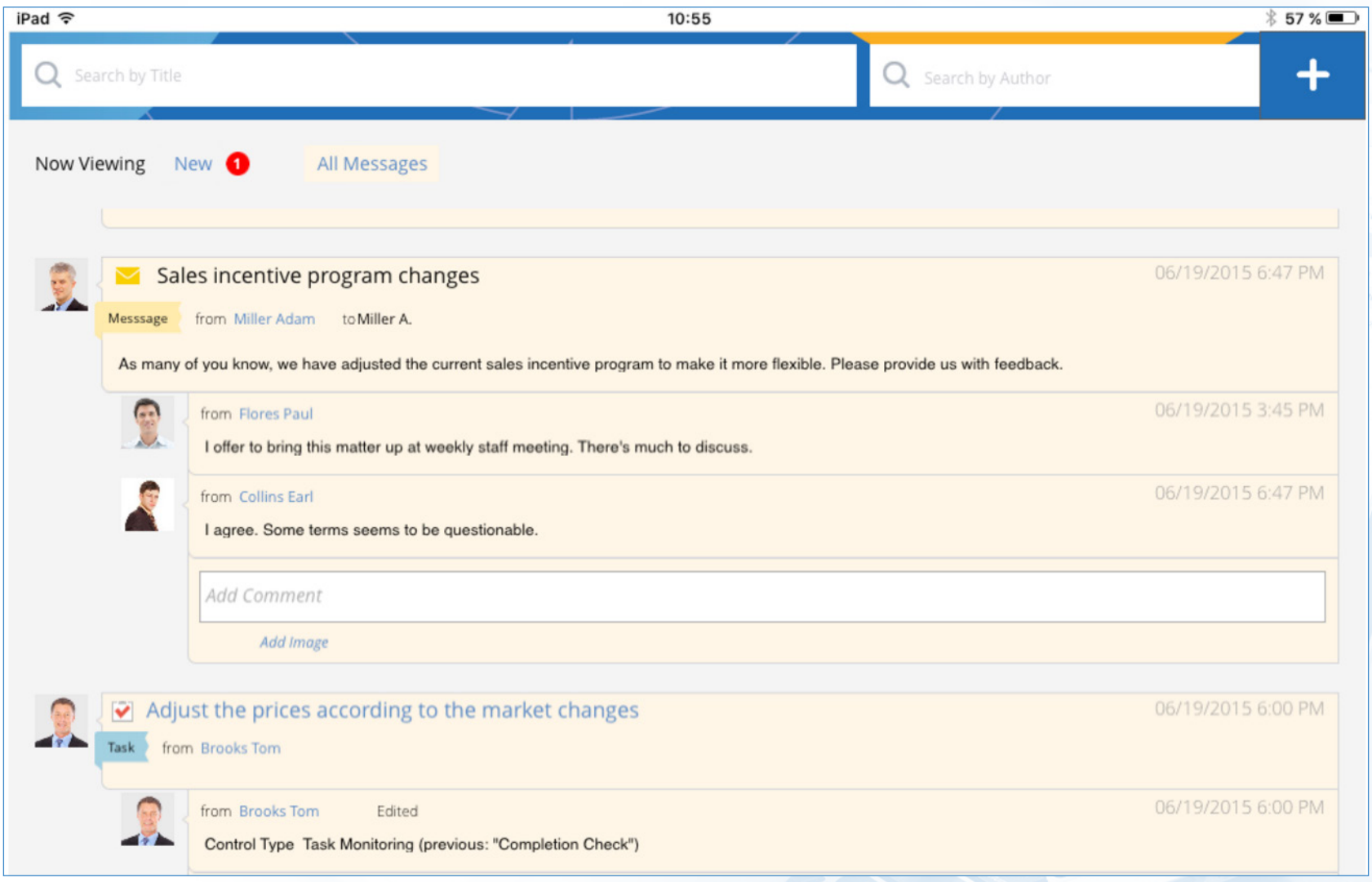
Push-notifications keep you informed about any changes in the system.

Having no Internet access is not a problem. For example, you can make task-related decisions and approve documents while you are offline. As soon as you get Internet access, all the changes will immediately be sent to the system.

The application's interfaces are simple and very convenient for working in ELMA while you are out of the office.




56% 4:22 PM
Approve
Reject
Approve an outgoing...
End Date
to 06/24/2015 10:59 PM
Author
Carter A.
Secretary
Priority
Regular
Attachments
Outgoing mail No. to Globotoce
Carter A. (06/22/2015 6:43 PM)
File downloaded


iPad
10:55
57 %
Search by Title
Search by Author
Now Viewing
New 1
All Messages
Sales incentive program changes
06/19/2015 6:47 PM
Messsage
from Miller Adam
to Miller A.
As many of you know, we have adjusted the current sales incentive program to make it more flexible. Please provide us with feedback.
from Flores Paul
06/19/2015 3:45 PM
I offer to bring this matter up at weekly staff meeting. There's much to discuss.
from Collins Earl
06/19/2015 6:47 PM
I agree. Some terms seems to be questionable.
Add Comment
Add Image
Adjust the prices according to the market changes
06/19/2015 6:00 PM
Task
from Brooks Tom
from Brooks Tom
Edited
06/19/2015 6:00 PM
Control Type Task Monitoring (previous: "Completion Check")

Integration with LDAP

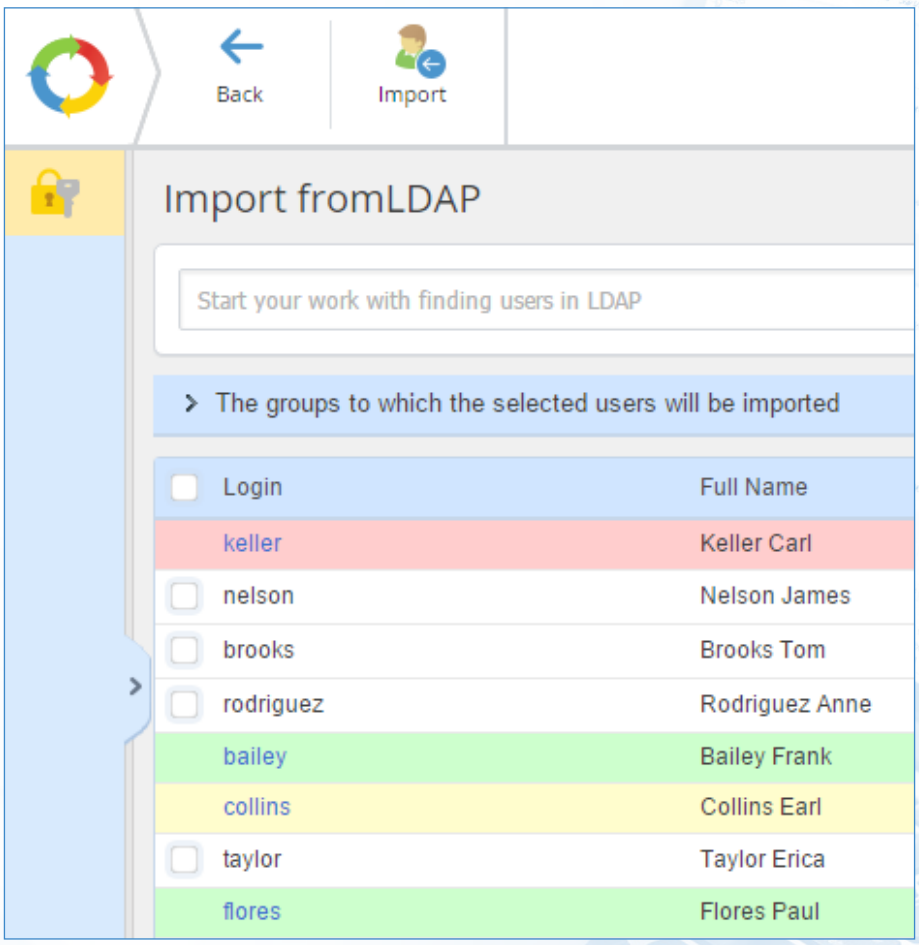
If your company is using an LDAP server, ELMA can be integrated with it and retrieve user data from the LDAP catalog. If your ELMA server is configured to work with LDAP, you can import the user list to ELMA from LDAP.

This allows you to use the single sign-on feature in ELMA BPM.

Microsoft Active Directory

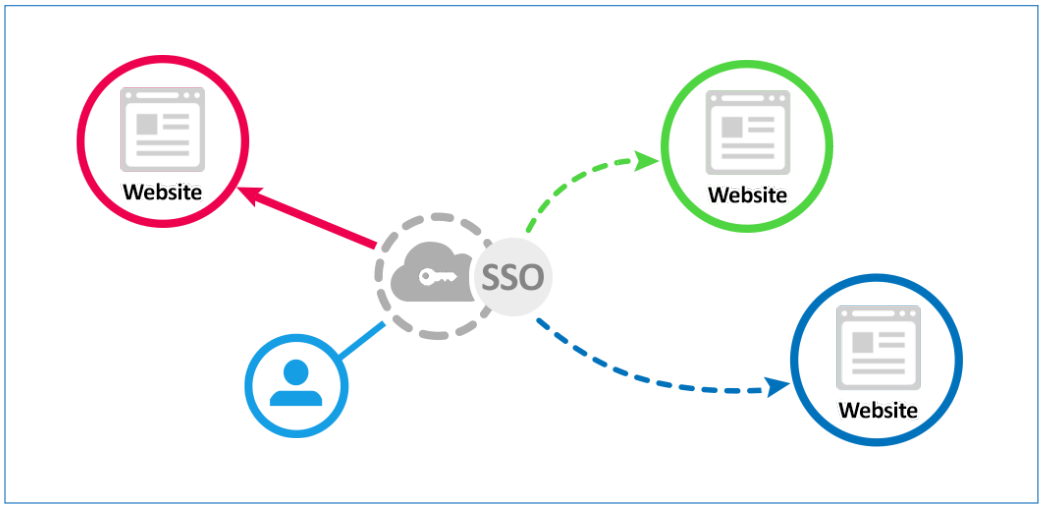
LDAP Integration

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)



Single Sign-On

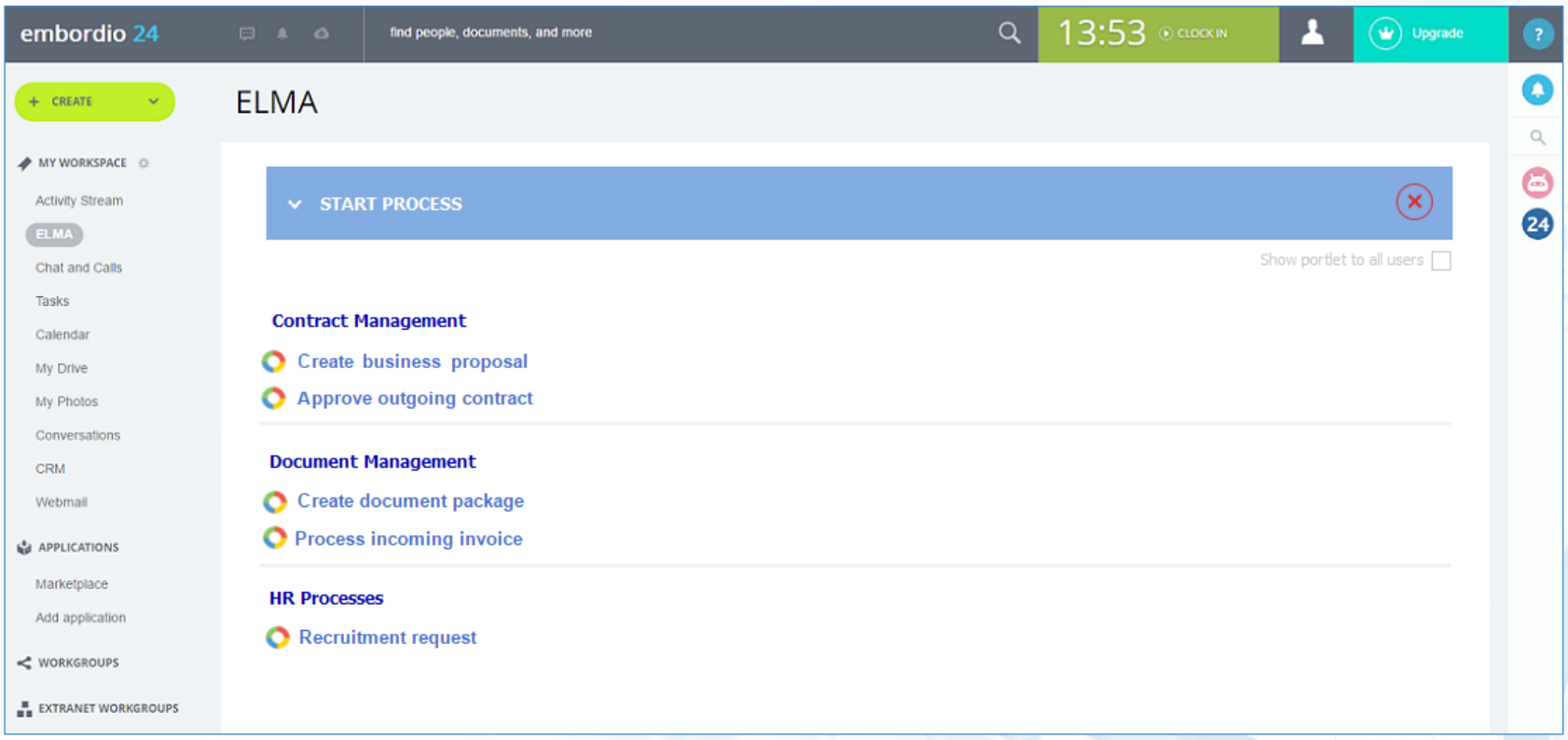
If your employees are using various corporate programs, it is very convenient to use single sign-on. With single sign-on, a user logs into all the corporate systems at once after being authenticated in the corporate domain.

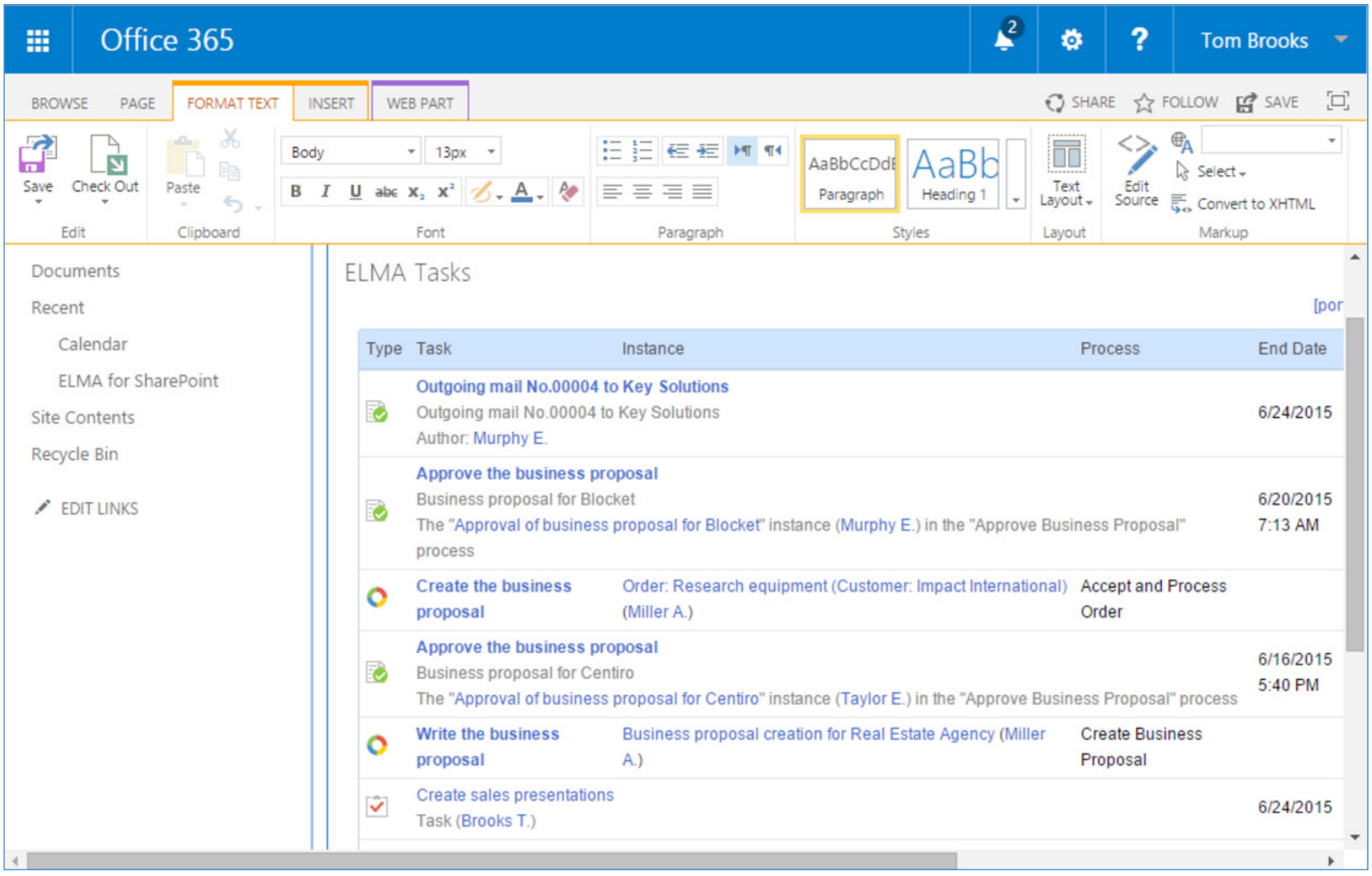


Integration with External Portal Solutions

The ELMA Portal Connector component allows you to integrate ELMA into the information portal already used in your company. At the moment, you can integrate ELMA with Bitrix 24 and MS SharePoint.

Portal Connector makes it possible to use ELMA portlets and features in Bitrix and SharePoint corporate portals.



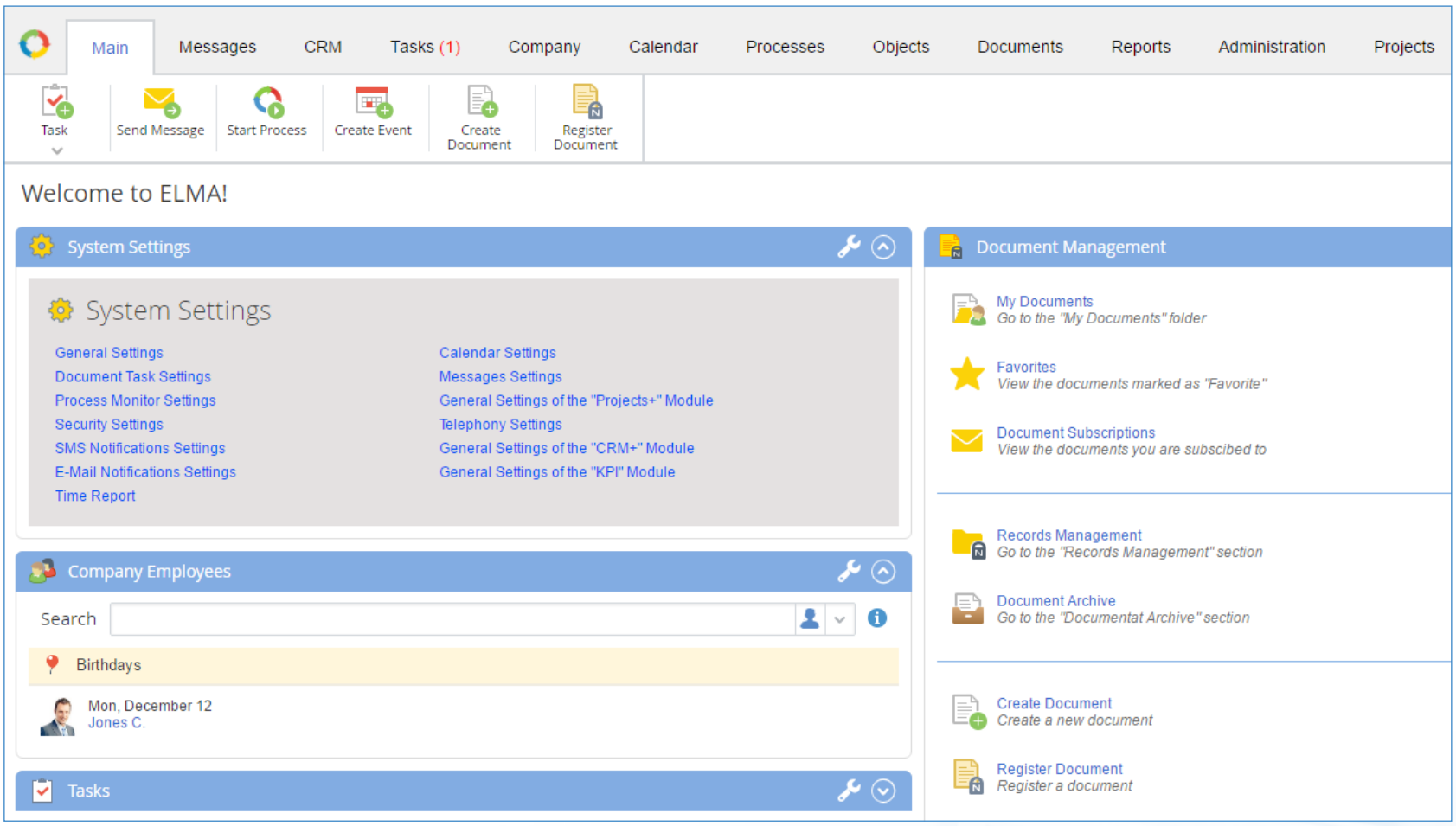

Office 365
Tom Brooks
BROWSE
PAGE
FORMAT TEXT
INSERT
WEB PART
SHARE
FOLLOW
SAVE
Save
Check Out
Paste
Body
13px
Paragraph
Heading 1
Text Layout
Edit Source
Select
Convert to XHTML
Edit
Clipboard
Font
Paragraph
Styles
Layout
Markup
Documents
Recent
Calendar
ELMA for SharePoint
Site Contents
Recycle Bin
EDIT LINKS
ELMA Tasks
Type
Task
Instance
Process
End Date
Outgoing mail No.00004 to Key Solutions
Outgoing mail No.00004 to Key Solutions
Author: Murphy E.
6/24/2015
Approve the business proposal
Business proposal for Blocket
The "Approval of business proposal for Blocket" instance (Murphy E.) in the "Approve Business Proposal" process
6/20/2015 7:13 AM
Create the business proposal
Order: Research equipment (Customer: Impact International) (Miller A.)
Accept and Process Order
Approve the business proposal
Business proposal for Centiro
The "Approval of business proposal for Centiro" instance (Taylor E.) in the "Approve Business Proposal" process
6/16/2015 5:40 PM
Write the business proposal
Business proposal creation for Real Estate Agency (Miller A.)
Create Business Proposal
Create sales presentations
Task (Brooks T.)
6/24/2015

Convenient User Interfaces (Lite and E-mail)

Lite Interface

If you are using ELMA Web Application as a shared internal portal of your company, you might want to use different interfaces for different groups of users. Some users do not need to use all the system capabilities included in the standard interface. For them, the simplified Lite Interface will be much more convenient.

For example, you can configure the Lite Interface to feature only two or three controls.



Rich e-mail Interface

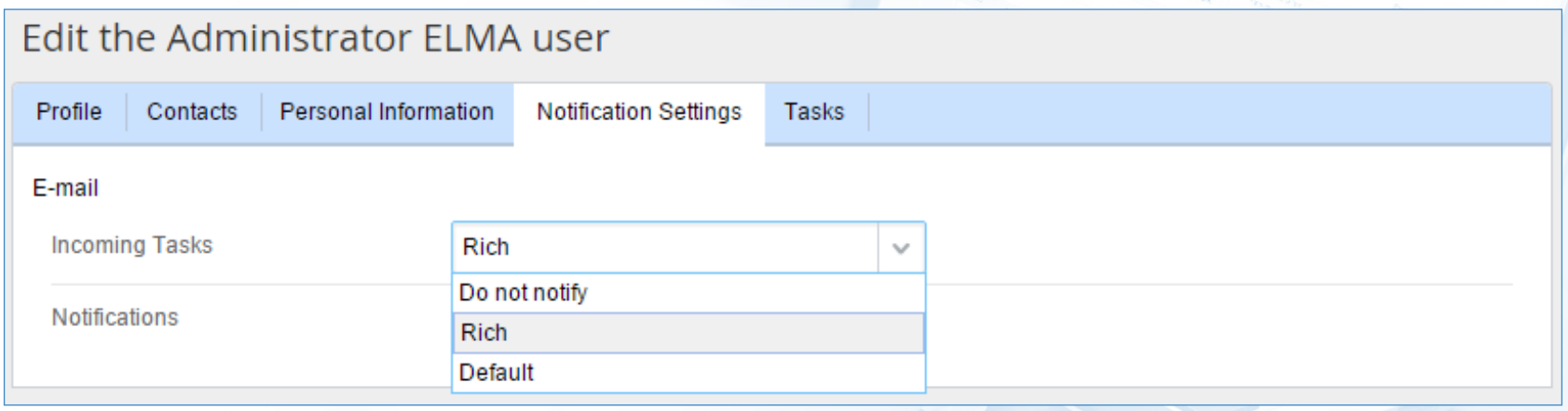
For those users who use e-mail services in their work, ELMA offers the ELMA Rich e-mail interface (ELMA.RE).

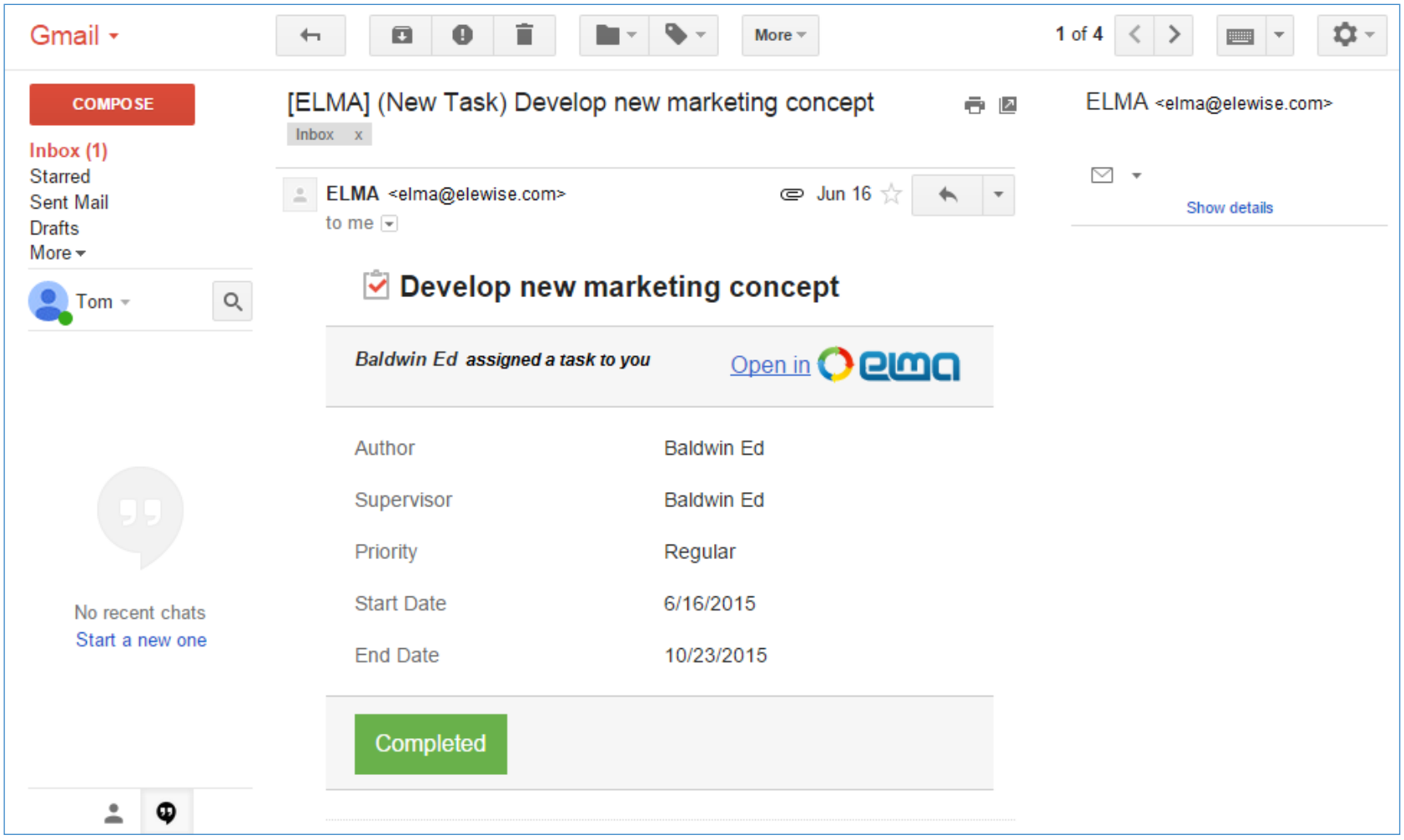
ELMA.RE sends information about your tasks in ELMA to your e-mail box, making it possible to make a decision right from the e-mail page.

All the incoming tasks are sent to your Incoming folder. You can also set up a filter so that you ELMA e-mails do not mix up with the rest of your mail.

ELMA.RE not only notifies you, but also provides all the necessary information for making a decision. For example, if you are assigned with a task to read and approve a document, the document itself and all the relevant information will be attached to the e-mail.

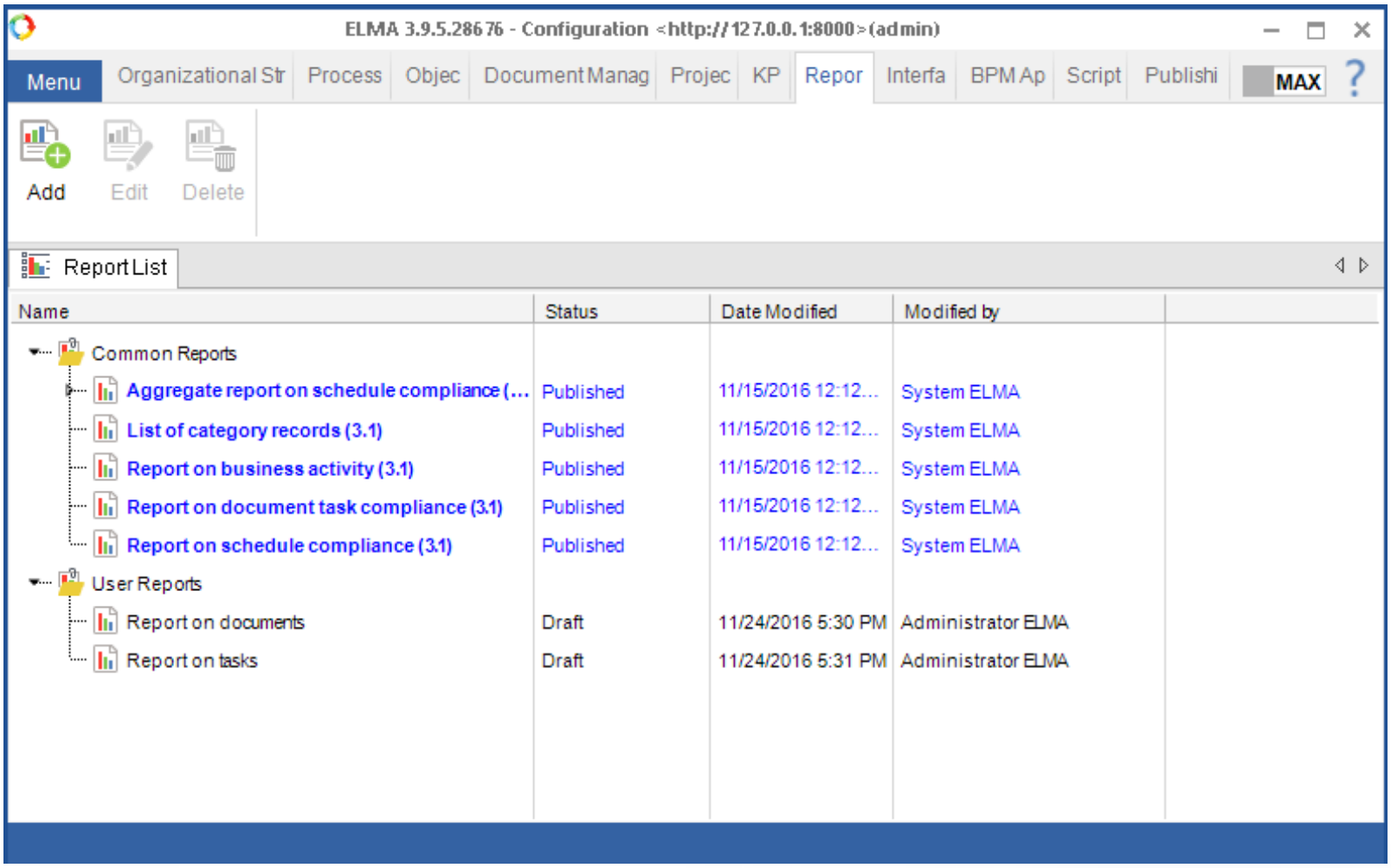
As for business process tasks, you will see all the necessary information fields.

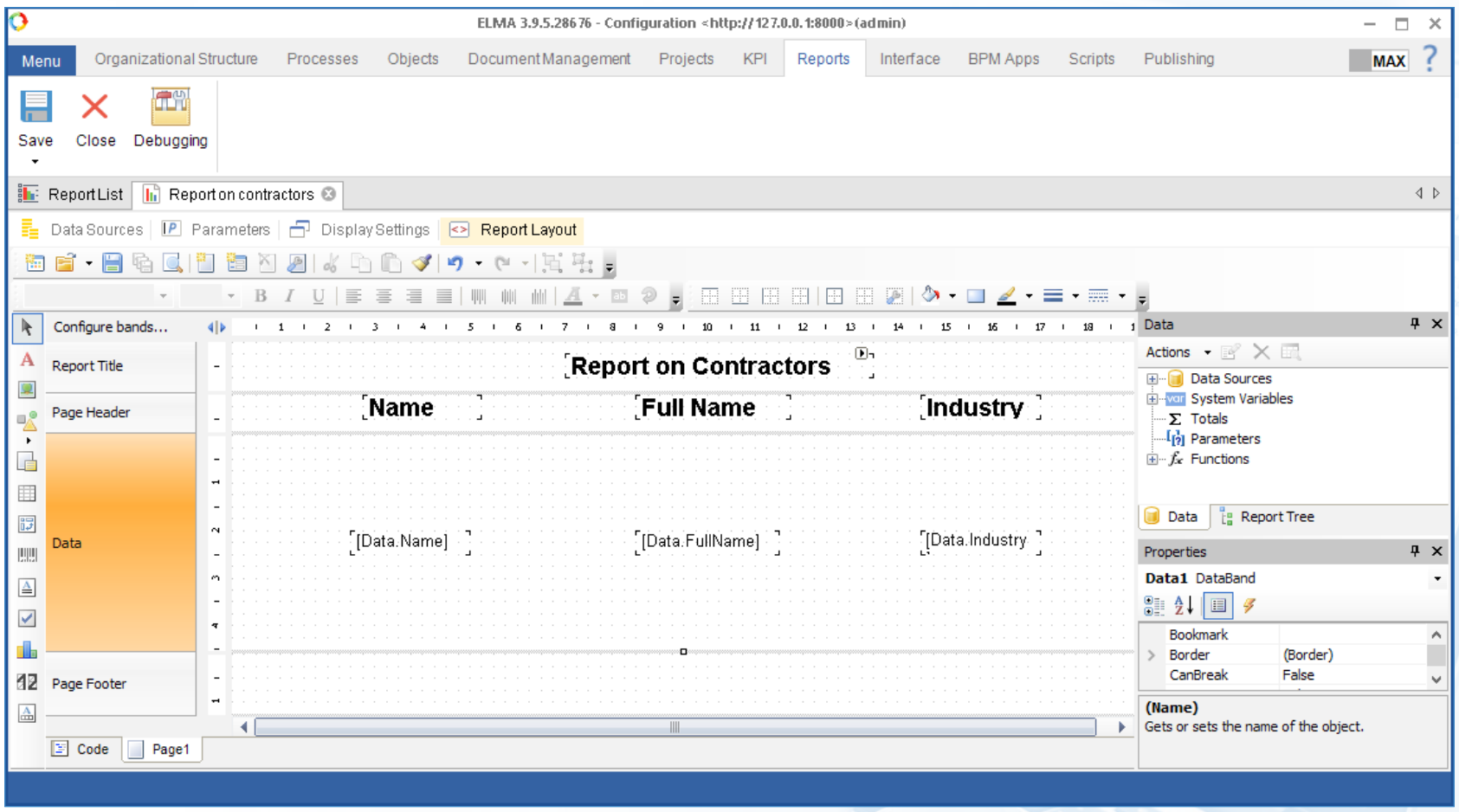



Gmail
More
1 of 4
COMPOSE
Inbox (1)
Starred
Sent Mail
Drafts
More
Tom
No recent chats
Start a new one
[ELMA] (New Task) Develop new marketing concept
Inbox x
ELMA <elma@elewise.com>
to me
Jun 16
ELMA <elma@elewise.com>
Show details
Develop new marketing concept
Baldwin Ed assigned a task to you
Open in
Author
Baldwin Ed
Supervisor
Baldwin Ed
Priority
Regular
Start Date
6/16/2015
End Date
10/23/2015
Completed

Report Maker

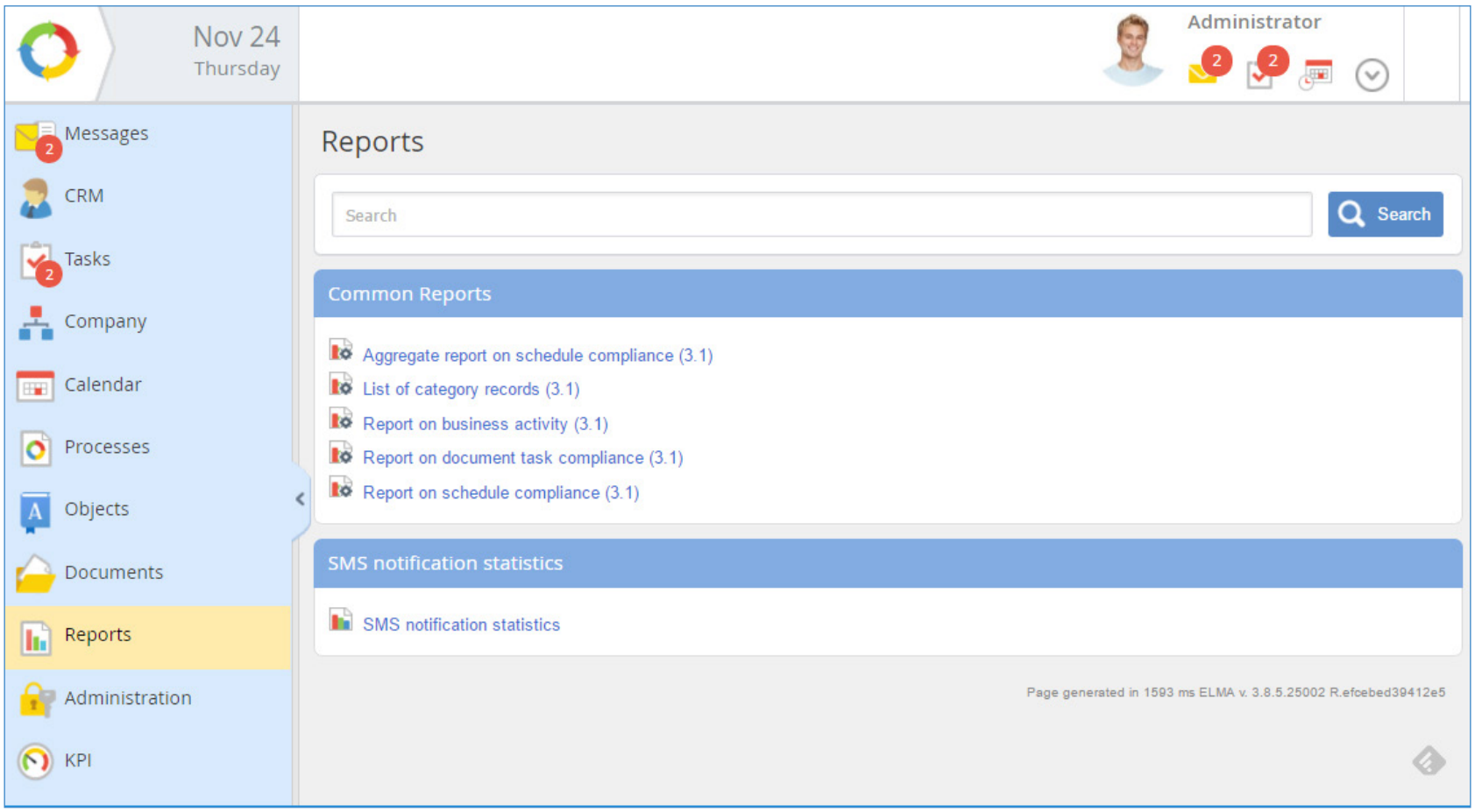
ELMA allows you to create user reports, and personalize and configure them to suit certain user or company requirements. This is done in the Report Maker section of ELMA Designer, which features a graphic editor for report templates. Here you can configure the report view form and see a preview.

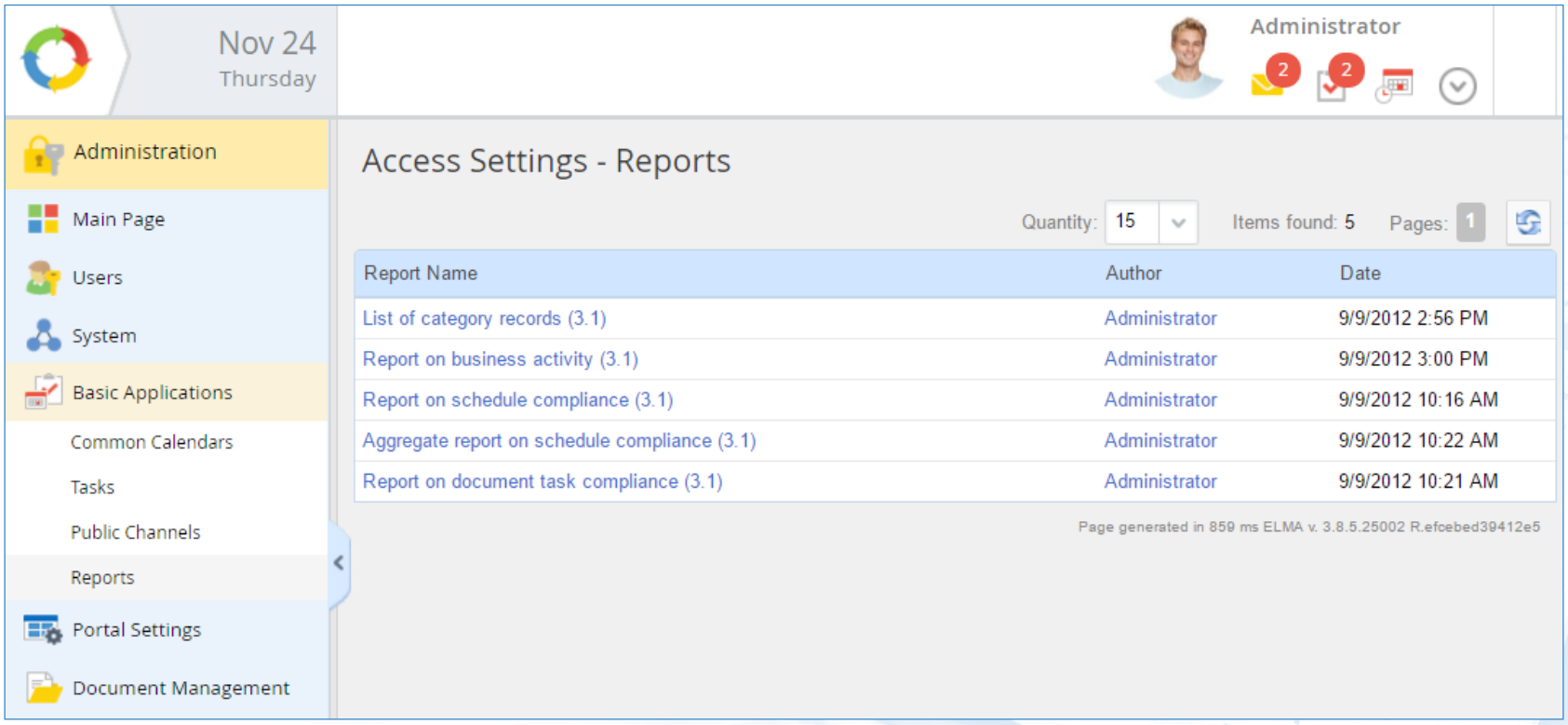




Default Reports

Reports are used to check schedule compliance and to analyze documents registered in the system. ELMA BPM includes 5 reports, which you can use to analyze the user activity. Reports are managed in the Reports section of the Web Application. By default, this section and the system reports are only available to system administrators.





The following reports are available in this section:

• **Aggregate report on schedule compliance** – displays summary statistics on the tasks of ELMA users over a certain period: the number of assigned, completed, overdue tasks, etc.

Aggregate report on schedule compliance (3.1)

Parameters

Aggregate report on schedule compliance

End date: from 11/1/2016 to 11/28/2016

Quantity: 15 | Items found: 25 | Pages: 1 2

Employee	Total for period	Completed	Executing	Completed on time	Overdue	Completed on time, %	Active overdue tasks
Administrator	2	2	0	2	0	100.00 %	0
Bailey F. (Chief of IT-Department, Head of Workshop No. 1)	3	3	0	3	0	100.00 %	0
Baldwin E. (Chief Marketing Officer, Head of Marketing Department)	3	1	2	1	1	33.33 %	1
Brooks T. (Chief Executive Officer)	2	1	1	1	0	50.00 %	0
Campbell M. (Office Manager)	0	0	0	0	0	0.00 %	0
Carter A. (Secretary)	3	2	1	2	1	66.67 %	1
Collins E. (Deputy CCO, Head of Branch Office No. 2)	2	2	0	2	0	100.00 %	0
Dunn T. (Member of Marketing Department)	1	1	0	1	0	100.00 %	0
Flores P. (Head of Sales Department)	3	3	0	3	0	100.00 %	0
Gibbs C. (Quality Control, Worker of Workshop No. 1, Worker of Workshop No. 3)	0	0	0	0	0	0.00 %	0
Harris D. (Head of Branch Office No. 1)	1	0	1	0	0	0.00 %	0
Keller C. (Head of Service Department, Technologist)	0	0	0	0	0	0.00 %	0
Lopez B. (Member of Logistics Department, Warehouse Employee)	6	5	1	5	1	83.33 %	1
Miller A. (Chief Commercial Officer)	3	2	1	2	1	66.67 %	1
Murphy E. (Sales Manager)	0	0	0	0	0	0.00 %	0

• **Report on document task compliance** – displays a list of document-based tasks. The report contains a list of all the tasks, executors, due dates and statuses.

Report on document task compliance

Quantity: 10 | Items found: 129 | Pages: 1 2 3 ... 13

Type	Task	Executor	End Date	Task Status
	Rental charges of 6/22/2015 11:13 AM			
	~~Rental charges of 6/22/2015 11:13 AM~~	~~Brooks Tom~~	~~6/24/2015~~	~~Closed by Author~~
	Insurance payments.docx of 6/19/2015 11:30 AM			
	~~Insurance payments.docx of 6/19/2015 11:30 AM~~	~~Walker Scott~~	~~6/23/2015~~	~~Closed by Author~~
	Advertising campaign.docx of 6/16/2015 3:59 PM			
	~~Advertising campaign.docx of 6/16/2015 3:59 PM~~	~~Brooks Tom~~	~~6/24/2015~~	~~Closed by Author~~
	Sales incentive program.docx			
	~~Sales incentive program.docx~~	~~Brooks Tom~~	~~12/15/2015~~	~~Completed~~
	Sales incentive program.docx	Brooks Tom	12/15/2015	Executing
	Sales incentive program.docx	Miller Adam	12/15/2015	New Task
	Incoming mail No.00002 from Cygni	Registered: 5/11/2015	Decision: Keller Carl	
	~~Make a decision about the incoming mail~~	~~Keller Carl~~		~~Completed~~
	Inform the client about claim rejection	Harris David	6/23/2015	New Task
	~~Register the incoming mail~~	~~Carter Ann~~		~~Completed~~
	Business proposal for Gatewit			
	~~Approve~~	~~Brooks Tom~~	~~5/27/2015~~	~~Completed~~

Total documents: 6
Total tasks: 10

~~Completed tasks: 0~~
Incomplete tasks: 0
Overdues tasks: 0

• **Report on business activity** – displays all the tasks, relationships, calendar events, deals and leads of selected ELMA users over a certain period.

Report on business activity (3.1)

› Parameters

Quantity: 15 | Items found: 37 | Pages: 1 2 3

Name	Time	Author	Description
Saturday, November 05, 2016			
Sign the rental contract	12:50	Baldwin Ed	
Design the office interior	12:50	Baldwin Ed	
Design the office door sign	12:50	Baldwin Ed	
Contract signing deadline	12:50	Baldwin Ed	
Recruitment	12:50	Baldwin Ed	
Review the applicants	12:50	Baldwin Ed	
Choose an office equipment vendor	12:50	Baldwin Ed	
Saturday, November 12, 2016			
Sign a contract with the office equipment vendor	16:56	Baldwin Ed	
Sunday, November 20, 2016			
Redesign the product presentations	15:32	Brooks Tom	
Approve Task - Redesign the product presentations	15:32	Brooks Tom	
Enter plan value	16:39	Brooks Tom	
Enter plan value	16:47	Brooks Tom	

Deals : 0
Events : 2
Leads : 0
Relationships: 0
Tasks
Completed: 4
Executing: 1
Total : 14

• **Report on schedule compliance** – displays detailed information about the tasks of a selected ELMA user: the task list, completed and overdue tasks, etc.

Report on schedule compliance (3.1)

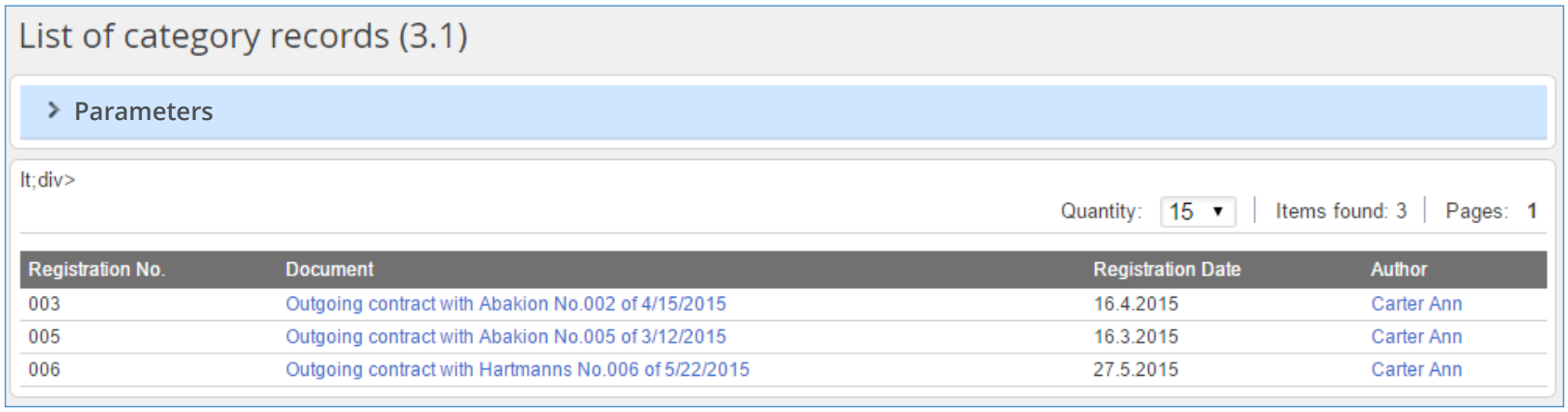
› Parameters

Report on schedule compliance
End date: from 11/1/2016 to 11/24/2016

Quantity: 15 | Items found: 7 | Pages: 1

Type	Subject	Start Date	End Date	Completion Date
	Bailey F. (Chief of IT-Department, Head of Workshop No. 1) Active tasks: 3 Overdue tasks: 0			
	Receive the contract form from the ISP	11/4/2016	11/4/2016	6/3/2015
	Approve the ISP contract at the main office	11/5/2016	11/9/2016	6/9/2015
	Sign the ISP contract	11/10/2016	11/17/2016	6/16/2015
	Baldwin E. (Chief Marketing Officer, Head of Marketing Department) Active tasks: 3 Overdue tasks: 1			
	Edit the sales forecast according to market reaction	11/6/2016	11/12/2016	Overdue
	Update the production program according to the forecast changes	11/13/2016	11/20/2016	6/22/2015
	Approve the funding request Instance Travel expenses in process "Funding request"	11/22/2016	11/24/2016	-
	Brooks T. (Chief Executive Officer) Active tasks: 1 Overdue tasks: 0			
	Approve the overtime Instance Request for overtime for project Bring SMART LK to Market in process "Request for overtime"	11/23/2016	11/24/2016	Overdue

• **List of category records** – displays a list of all the documents registered in a certain category in the selected year. This report is only available if you have the ELMA ECM+ application installed.



List of category records (3.1)

Parameters

lt;div>

Quantity: 15 | Items found: 3 | Pages: 1

Registration No.	Document	Registration Date	Author
003	Outgoing contract with Abakion No.002 of 4/15/2015	16.4.2015	Carter Ann
005	Outgoing contract with Abakion No.005 of 3/12/2015	16.3.2015	Carter Ann
006	Outgoing contract with Hartmanns No.006 of 5/22/2015	27.5.2015	Carter Ann

Distributed Workload. Web Farm

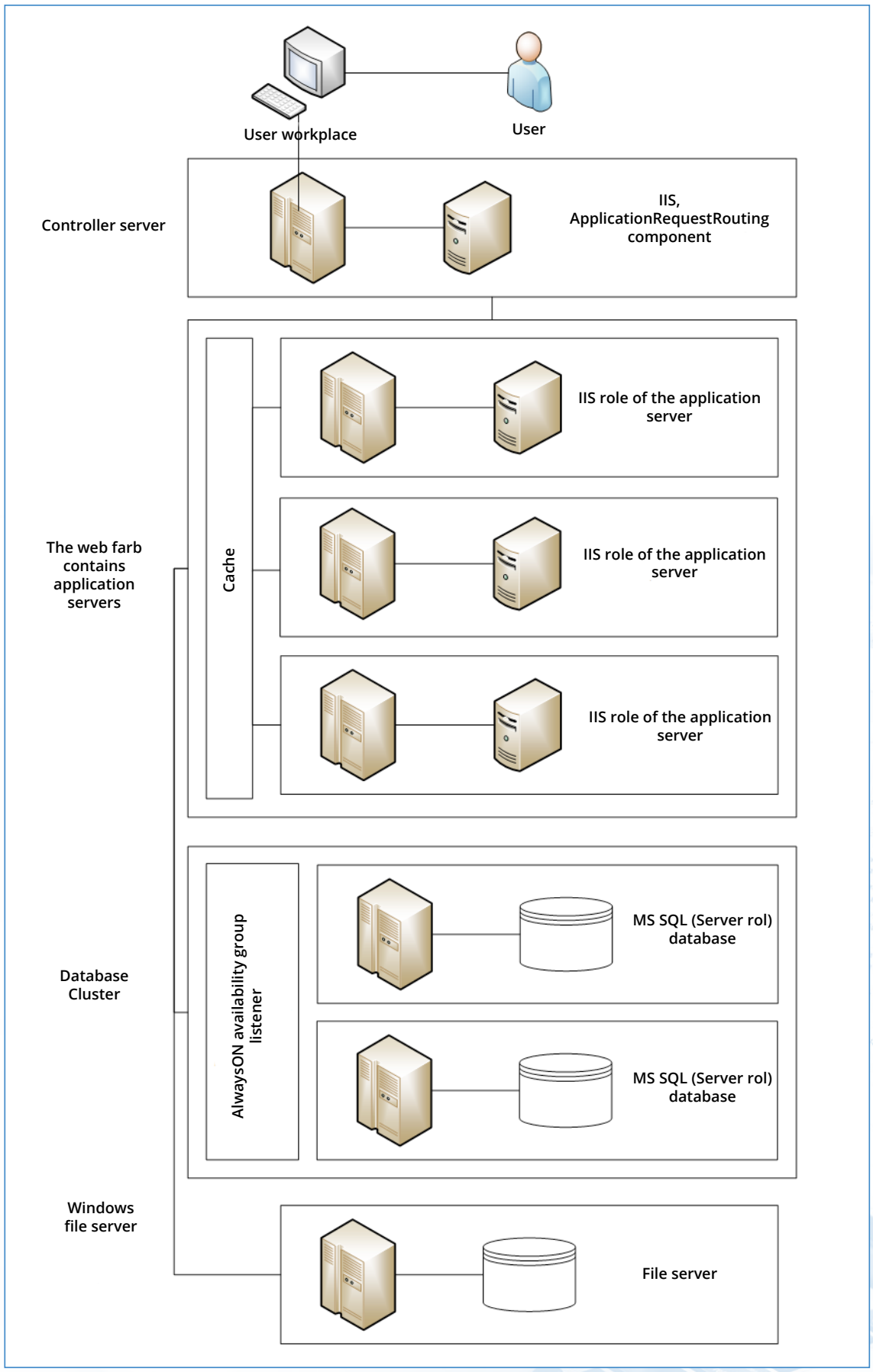
ELMA support a large volume of user data requests and computations. For better performance, distribute the workload between ELMA servers using the server controller.

In order for the ELMA web farm to function well, do the following:

• Deploy a fault tolerant cluster. It enables you to restart application without the system administrator if any program or hardware errors appear.

• Deploy MS Web Farm Framework. A web farm allows for load distribution (that is, user activity) between various servers, virtual or physical, working as one. This means that you can significantly increase the number of users working in the system at the same time.

Also, regularly perform database and ELMA system maintenance.

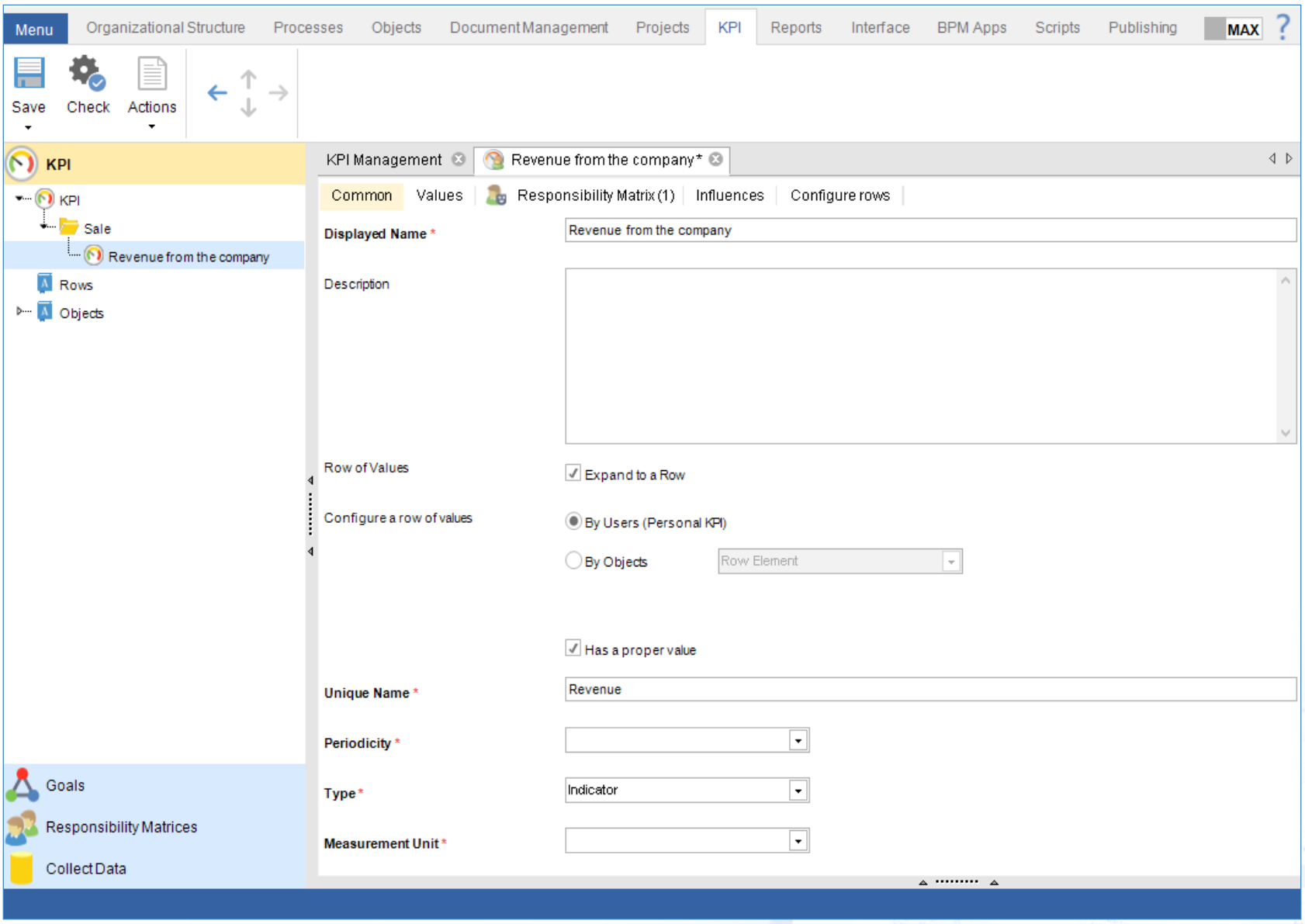


CAPABILITIES OF ELMA KPI

Configuring KPIs

ELMA KPI allows you to set up and customize a KPI system for your company. You can collect and monitor KPI values in any convenient form.

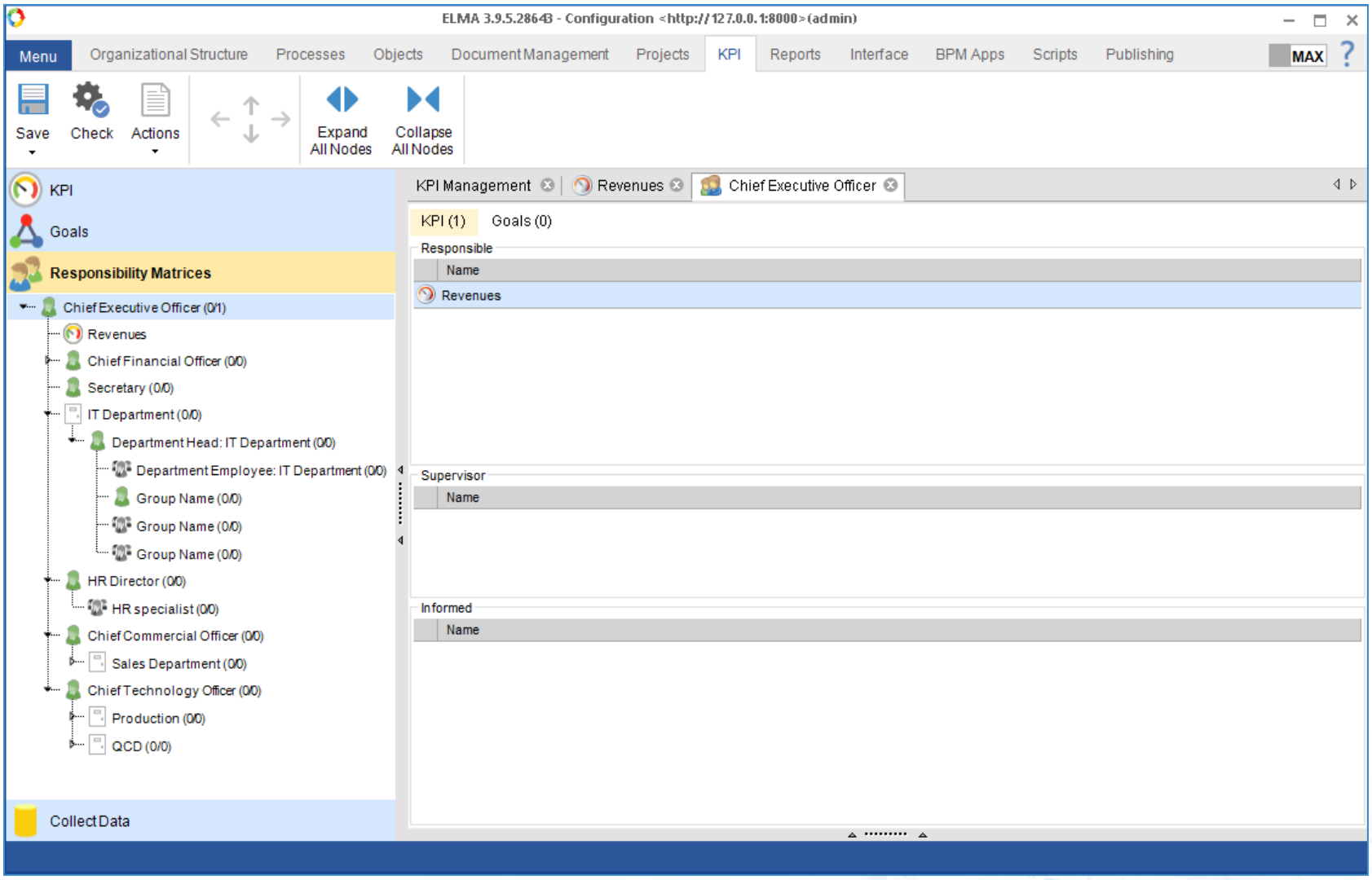
In ELMA Designer, you can create a KPI tree and specify a set of parameters for each KPI. For example, you can define how often a KPI is collected, how it is measured, and what are the plan values.



Responsibility

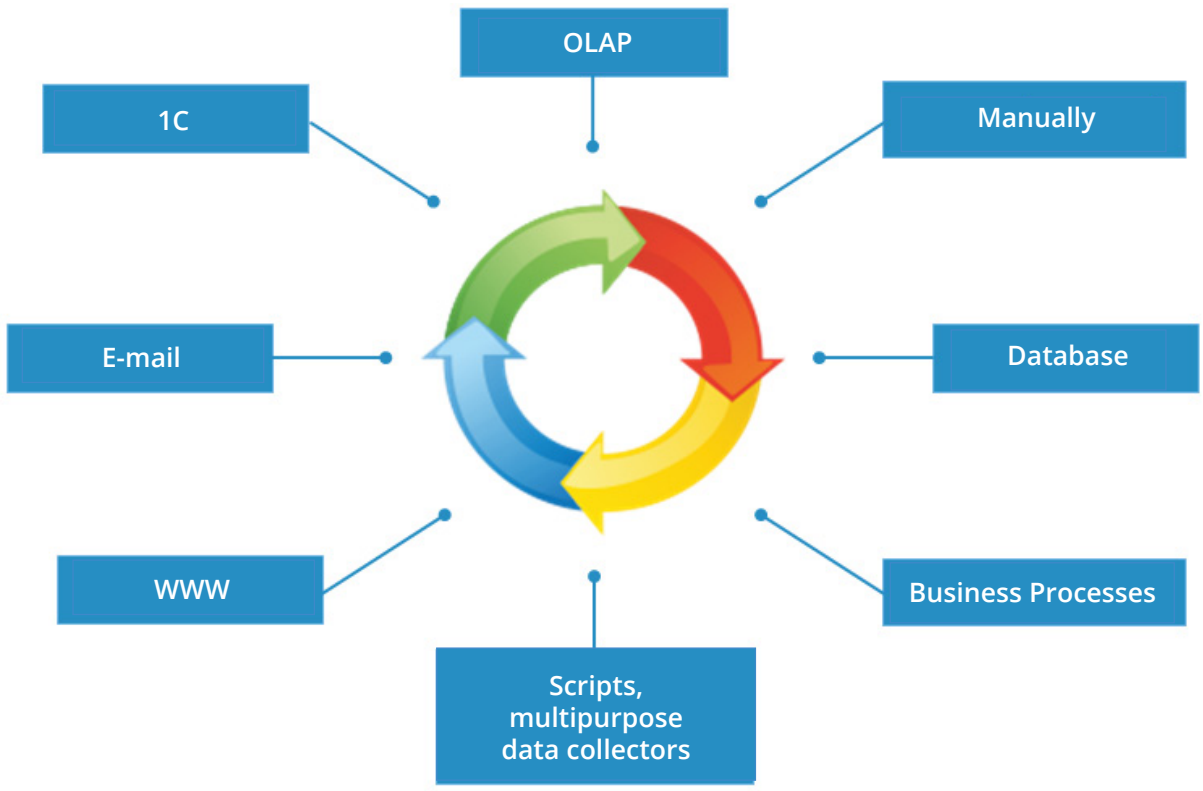
In ELMA KPI, you can assign KPIs to certain employees. This way, you always know who is responsible for a KPI, and each employee knows exactly what is expected of him or her.

The responsibility matrix shows an employee's performance and if he or she is adequate for the job.



Different Tools for Data Collection

ELMA KPI offers a wide variety of capabilities for data collection; you can always choose what is more convenient for your company at the actual moment.
For a KPI, which is introduced for a short period to control a specific problem, data is collected differently than that for a KPI that measures the company's entire activity.



Tools for Fast Decision-Making

ELMA KPI allows you to make immediate decisions. It offers you on-line statistics and analytical data, which you can use on the spot, no paper documents required.

ELMA displays all the data and enables you to monitor the current value and the potential outcome.

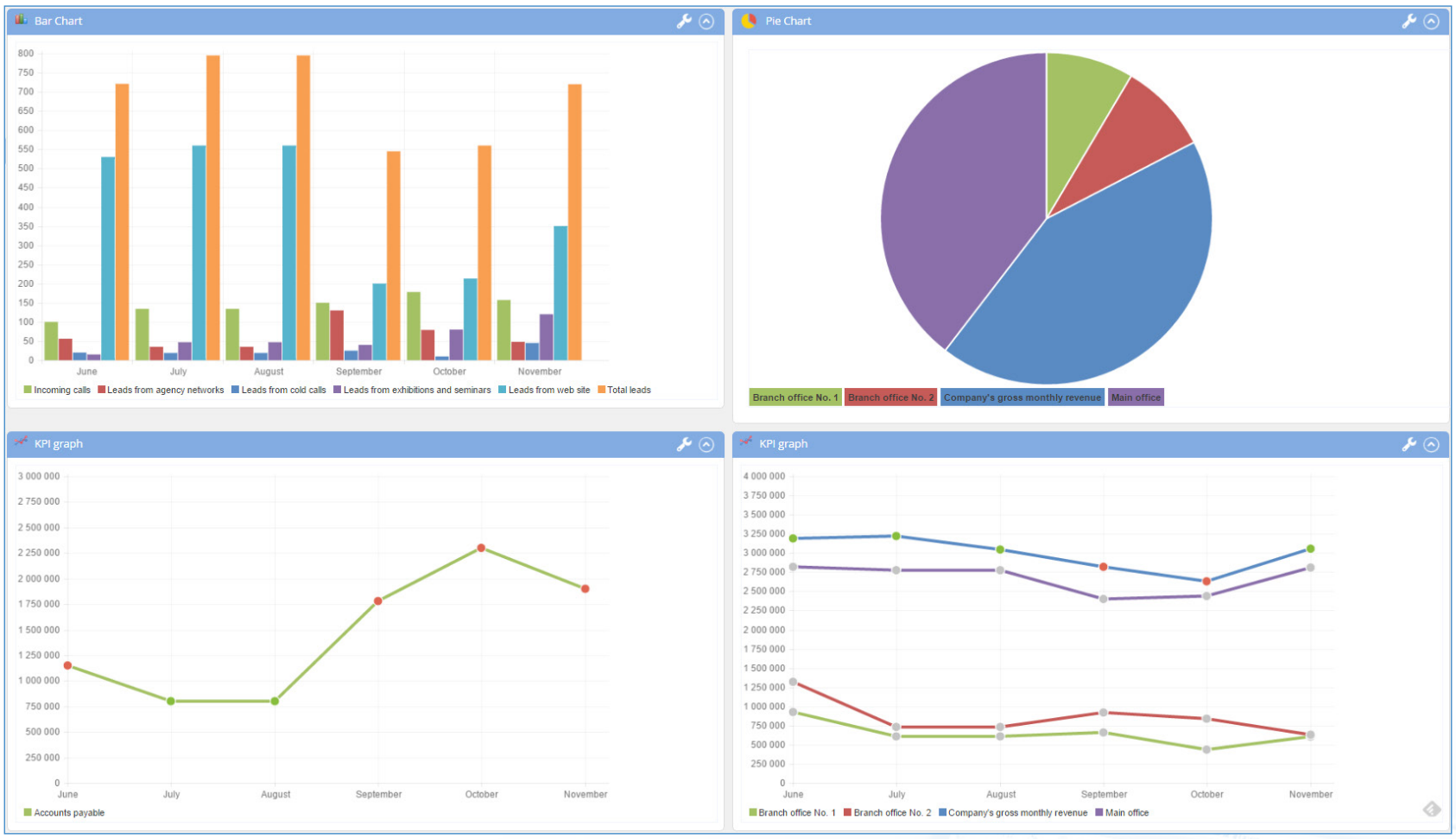
Indicator	Responsible	Periodicity	Period	Plan	Fact	Status	Trend
Marketing							
Total leads	Baldwin E.	Month	November	700 pcs.	720 pcs.		28.57%
Incoming calls	Baldwin E.	Month	November		157 pcs.		-11.8%
Leads from web site	Baldwin E.	Month	November		350 pcs.		64.32%
Leads from agency networks	Baldwin E.	Month	November		48 pcs.		-39.24%
Leads from cold calls	Baldwin E.	Month	November		45 pcs.		350%
Leads from exhibitions and seminars	Baldwin E.	Month	November		120 pcs.		50%
Sales							
Company's gross monthly revenue	Miller A.	Month	November	€ 3,000,000.00	€ 3,056,000.00		16.15%
Main office	Flores P.	Month	November		€ 2,810,000.00		15.21%
Branch office No. 1	Harris D.	Month	November		€ 606,000.00		38.99%
Branch office No. 2	Collins E.	Month	November		€ 630,000.00		-24.91%
Service department							
Claims resolved with no incidents, %	Keller C.	Month	November	100.00 %	85.29 %		-6.45%
Total claims	Keller C.	Month	November		2,284 pcs.		-3.06%
Claims resolved with no incidents	Keller C.	Month	November		1,948 pcs.		-9.31%
Finance							
Accounts payable	Webb E.	Month	November	€ 1,000,000.00	€ 1,900,000.00		17.39%

Dashboards for Data Analysis

ELMA uses dashboards for a better graphic representation of data and KPI dynamics.

Dashboards are perfect for a quick analysis of the current situation. They allows you to discuss all the relevant results and plans basing on exact data.

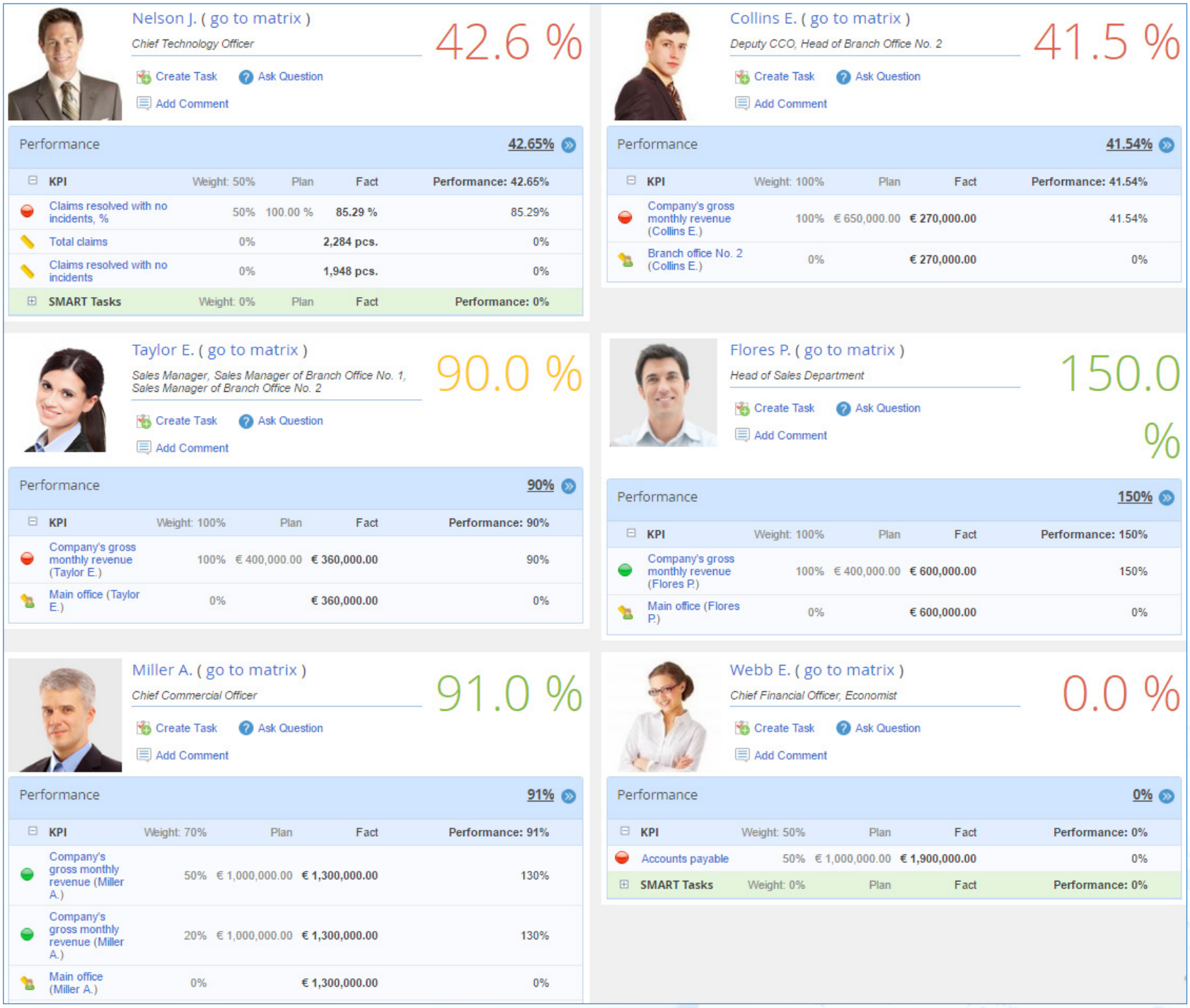
If your dashboards are configured well, you can turn time-consuming meetings into very effective ones, by quickly analyzing the deviations and finding solutions for optimization.



Employee Performance and Incentives

In order to make the best of your KPIs, tie them to your employees' performance and incentives.

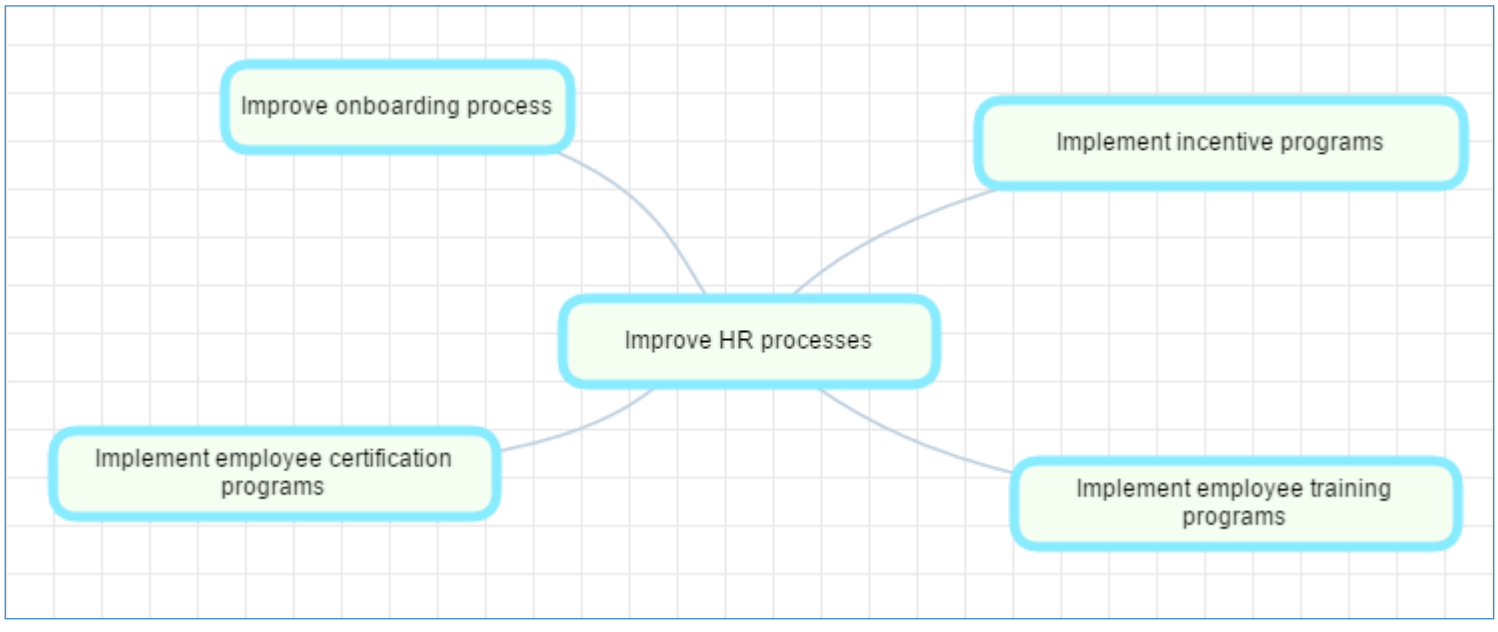
ELMA BPM can display information about all the employees on one screen, and you can learn how effective your personnel is.



Strategic and Operational Goals

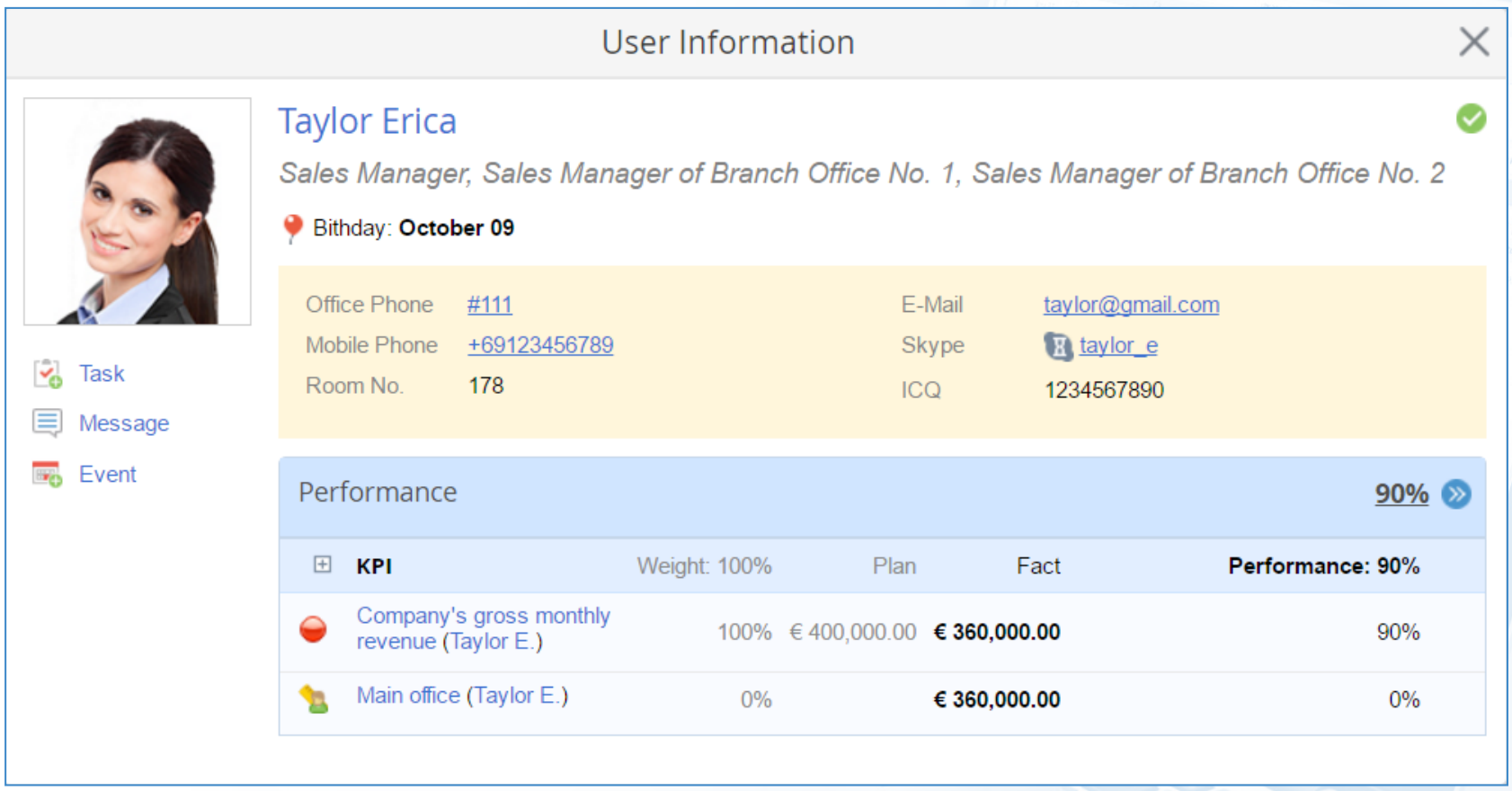
Apart from KPI and performance management, the ELMA KPI application offers you the possibility to manage your corporate goals.

You can configure a system of strategic and operational goals of your company, specify KPIs to measure the progress, and assign certain activities. ELMA timely informs you about any occurring problems and allows you to make corrections basing on actual data and not mere assumptions.



Employee Performance on User Page

With ELMA KPI and a configured performance matrix, the Performance portlet becomes available in user profiles and pages. It displays information on performance of a user over a certain period. Superiors can see their subordinates' performance on their pages in ELMA.



Action Register

ELMA allows you to add links to certain activities from the Action Register. It is very useful for setting up the left, top and main menus, adding links to web documents and HTML portlets, and so on.

For example, you can configure an HTML portlet for heads of departments so that they can access their employees' performance, and view the goal maps and KPIs.

KPI Management

Activities	Page	No	Open
Dashboards	Page	No	Open
Goal Maps	Page	No	Open
Goal Map Archive	Page	No	Open
Create SMART Task	Page	No	Open
My Performance	Page	No	Open
Matrix Templates	Page	No	Open
Start	Page	No	Open
KPI	Page	No	Open
Plan + Fact	Page	No	Open
Grades	Page	No	Open
All Employees	Page	No	Open
Employees	Page	No	Open
Edit	Page	No	Open
Objects	Page	No	Open
Processes	Page	No	Open
KPI	Page	No	Open
SMART Tasks	Page	No	Open
Strategy Maps	Page	No	Open
Goal Tree	Page	No	Open
My Responsibilities	Page	No	Open
My KPIs	Page	No	Open

HTML

Reports

Grades | Employees | Goal Tree

CAPABILITIES OF ELMA ECM+

Document Routing

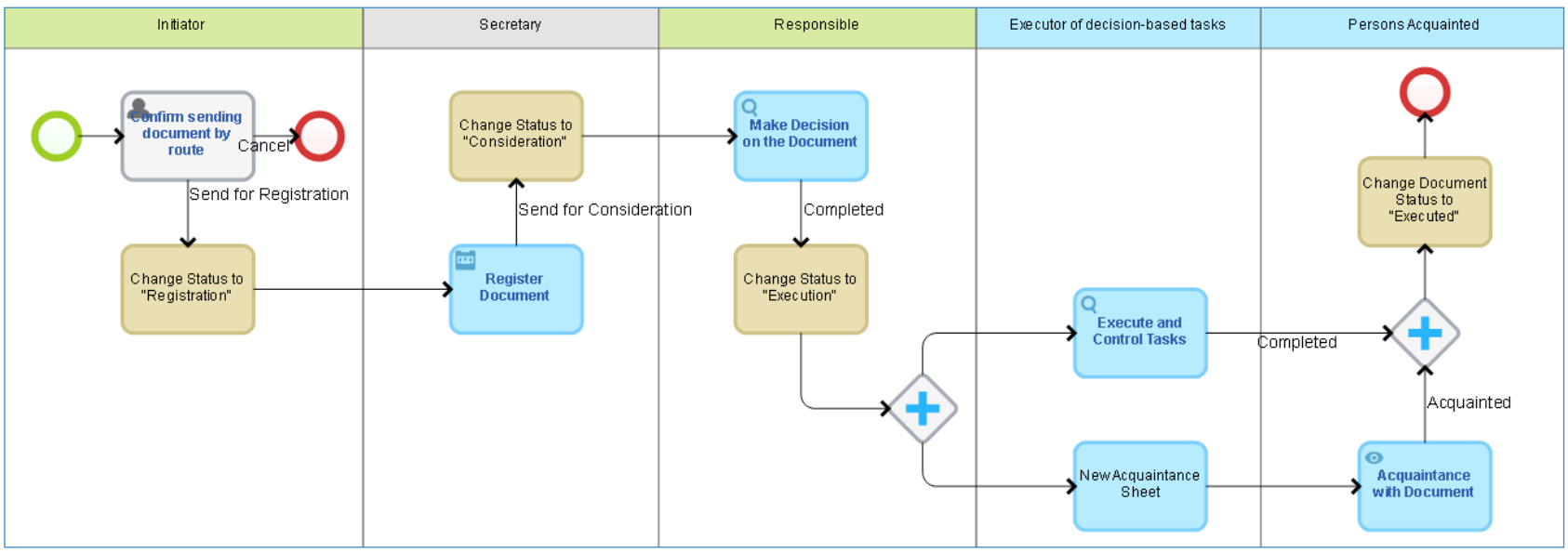
In ELMA BPM, you can create document routes for better document management. The routes are assigned to specific document types and are modeled in ELMA Designer with document management activities.

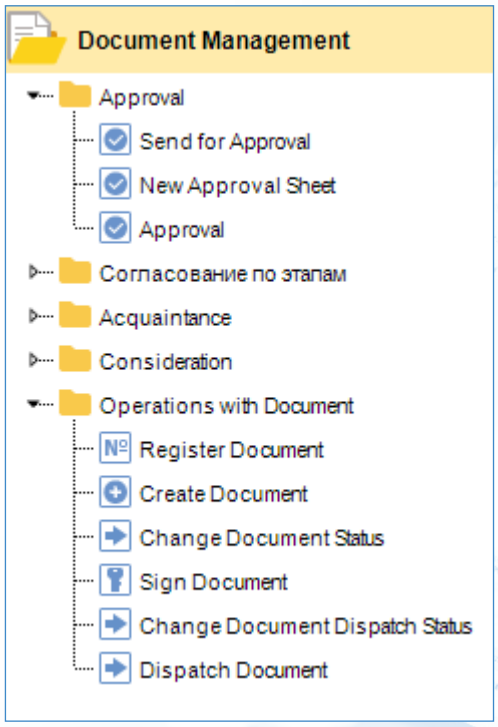
The benefits of using document routes are clear:

• documents move from one user to another as programmed;

• you can always check, where exactly in the route the document is;

• many document lifecycle stages can be automated, such as status update, approval and so on.

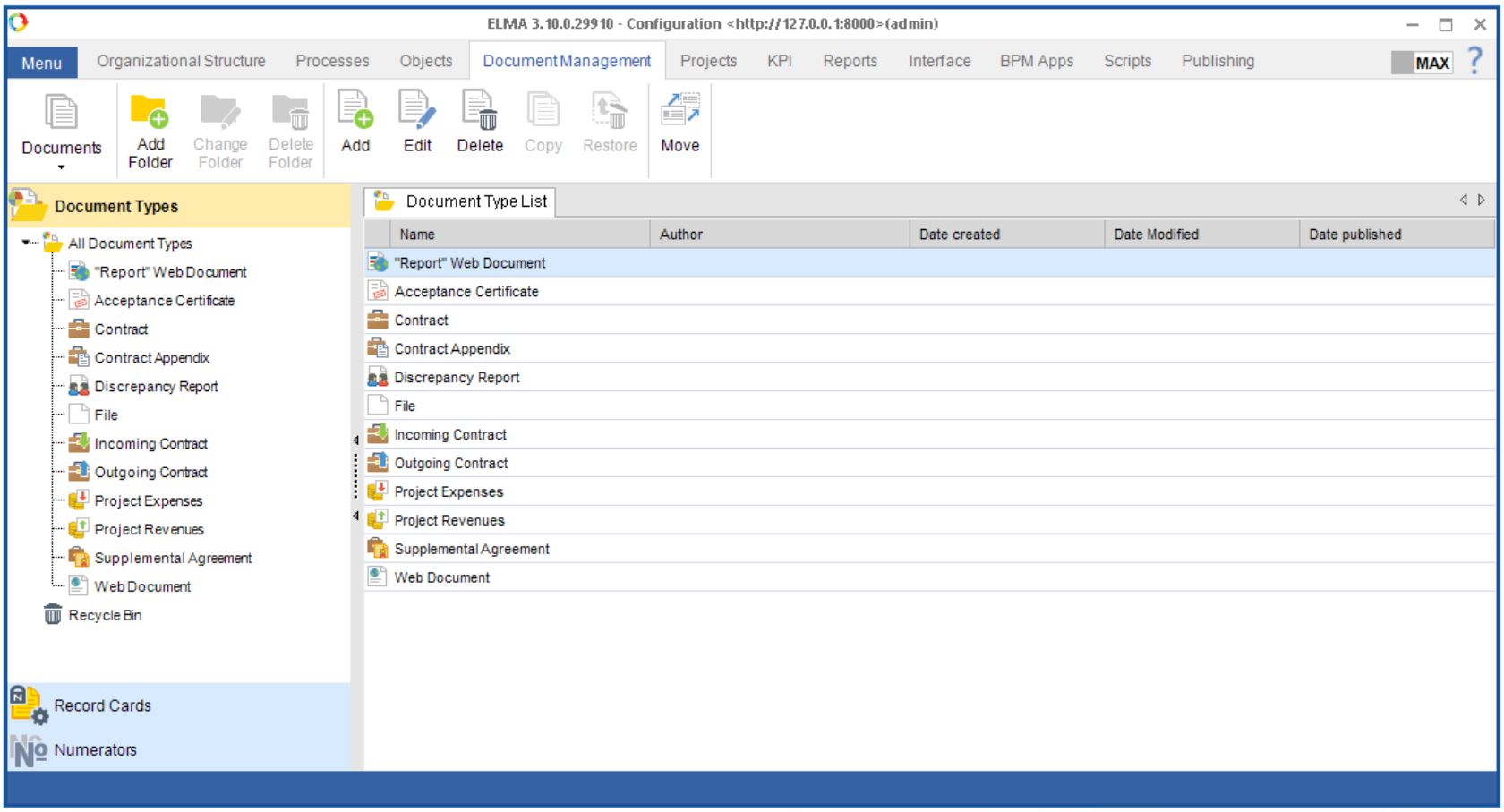




Configuring Document Types

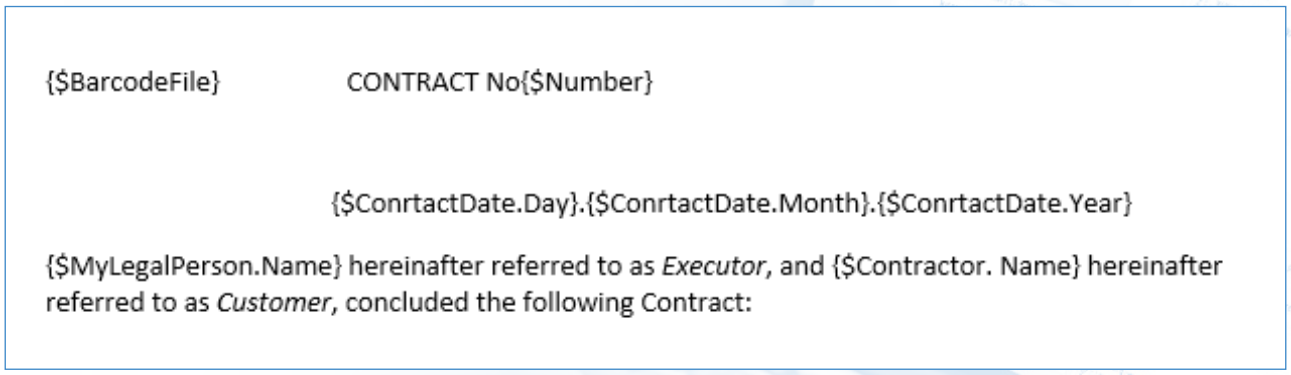
When configuring a document structure, it is important to define and set up your document types. For each document type, you can create an attribute model, a template, personalized view and edit forms, and a set of business processes for routing documents of this type.

This way you can define how the documents of a certain type are created, stored, registered, routed, accessed and deleted.



Document Templates

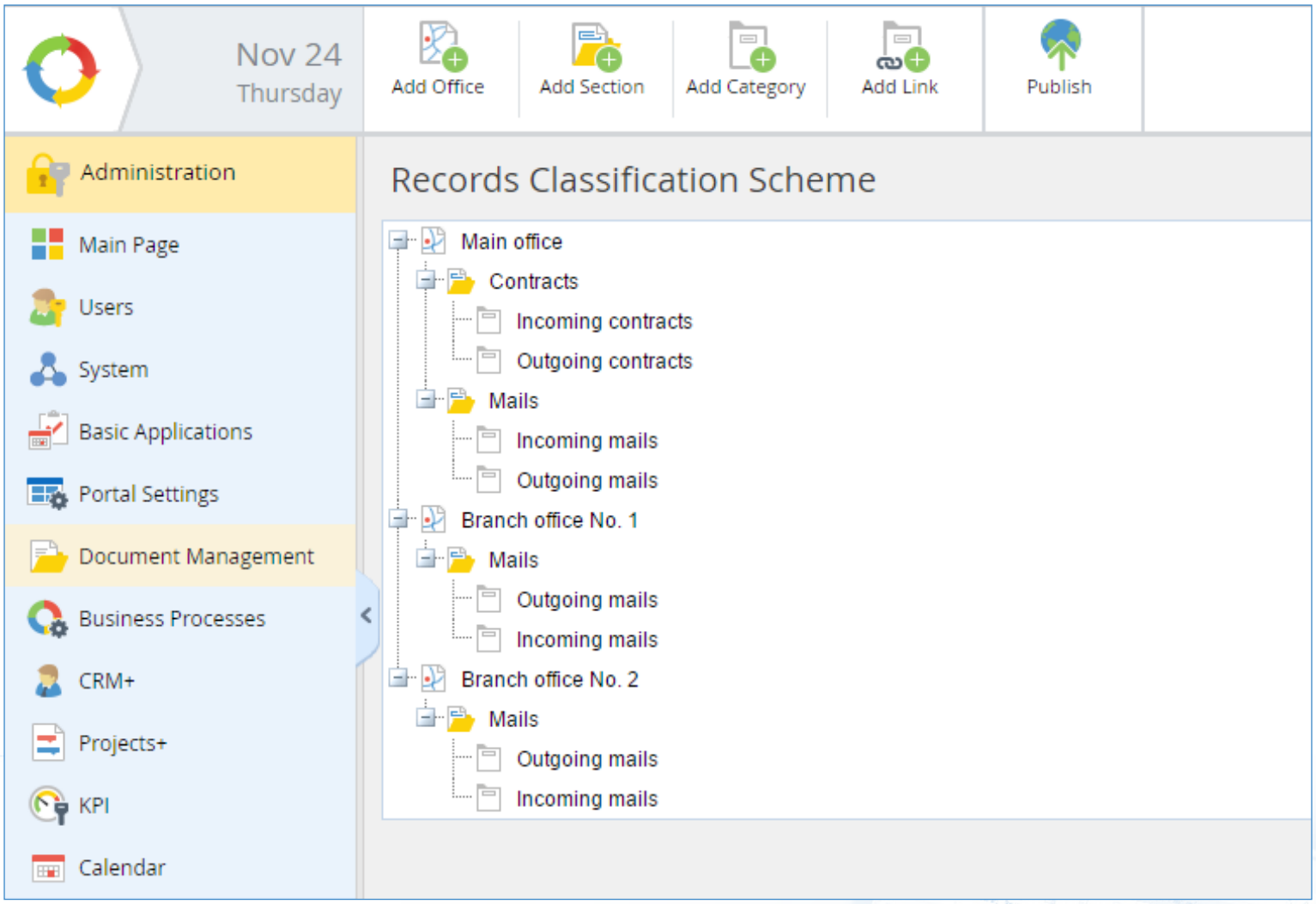
When you are dealing with a lot of similar documents, it is best to use document templates. With document templates you save time and avoid mistakes that appear when the data is entered manually. ELMA BPM allows you to automatically create documents from templates.



Records Classification Scheme

Configuration of the Records Classification Scheme includes creating registration offices, sections, categories and document types with document flows specific to your organization. Each category belongs to a certain registration office. Having different registration offices allows for a more convenient access to documents.

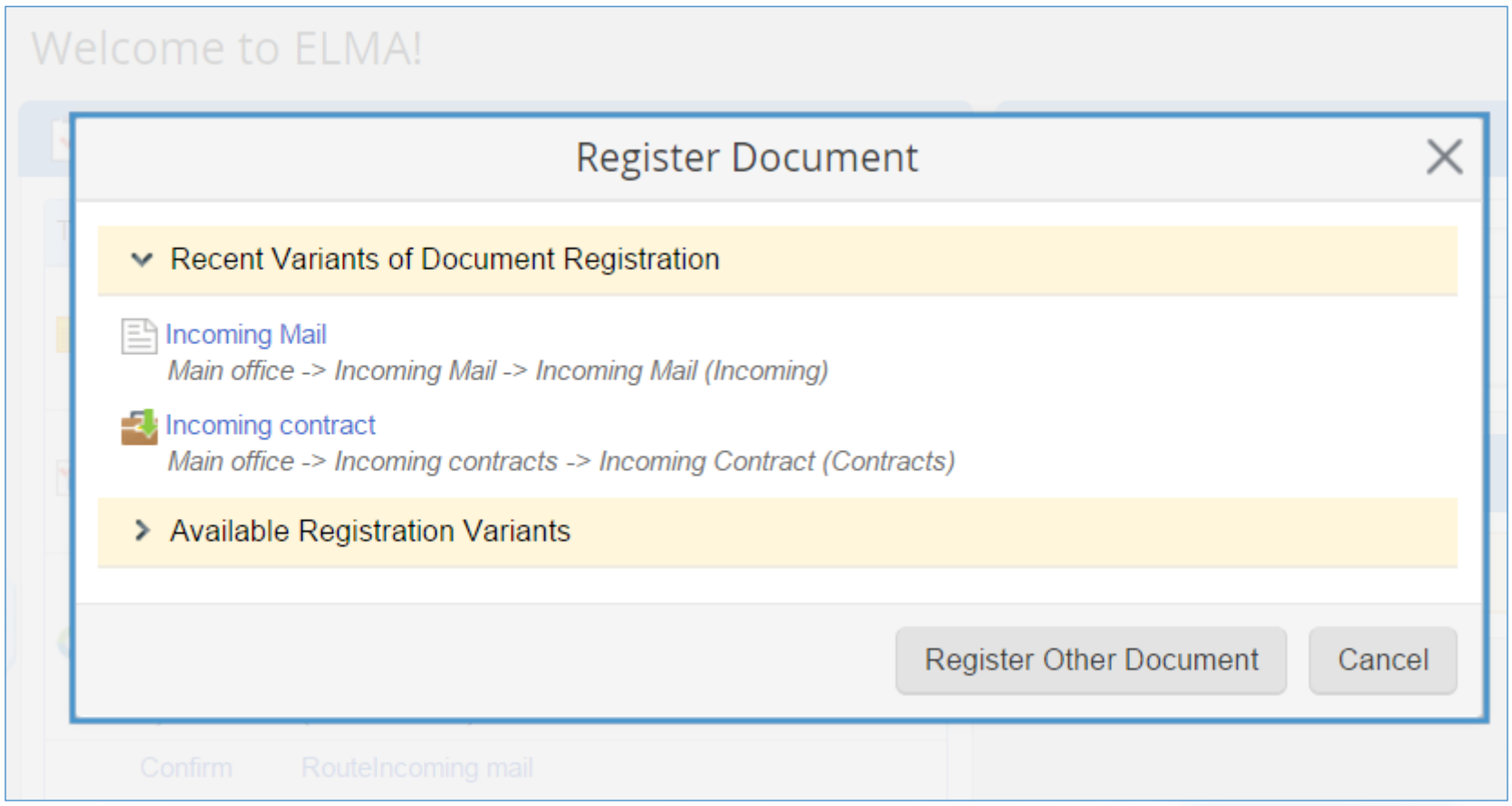
If your documents are arranged in a Records Classification Scheme, they are all assigned with specific numbers, which makes search very fast and easy.

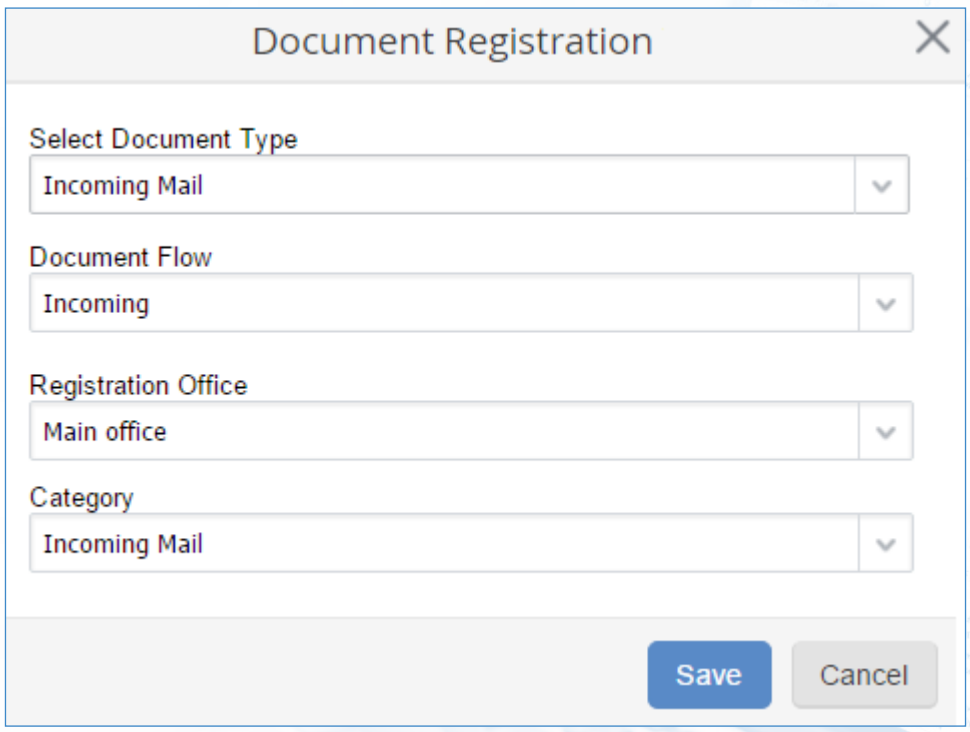


Registration and Handling of Documents

With records managements you can organize how the documents are registered, stored and searched for. You can control how document-related tasks are executed and review any decisions made.

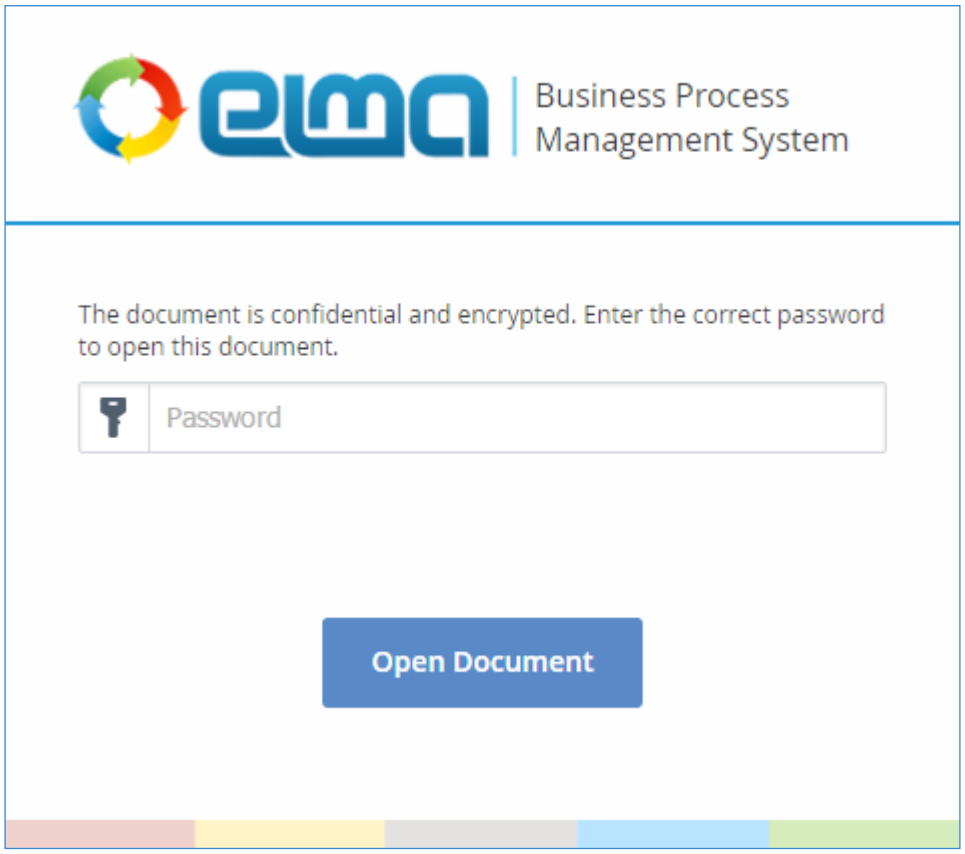
In ELMA, documents are registered on the main page in just one click. When a document is registered, ELMA creates a record card and assigns a registration number to the document. The number is generated automatically according to the registration office and category. A registered document becomes official to your company's document management system.

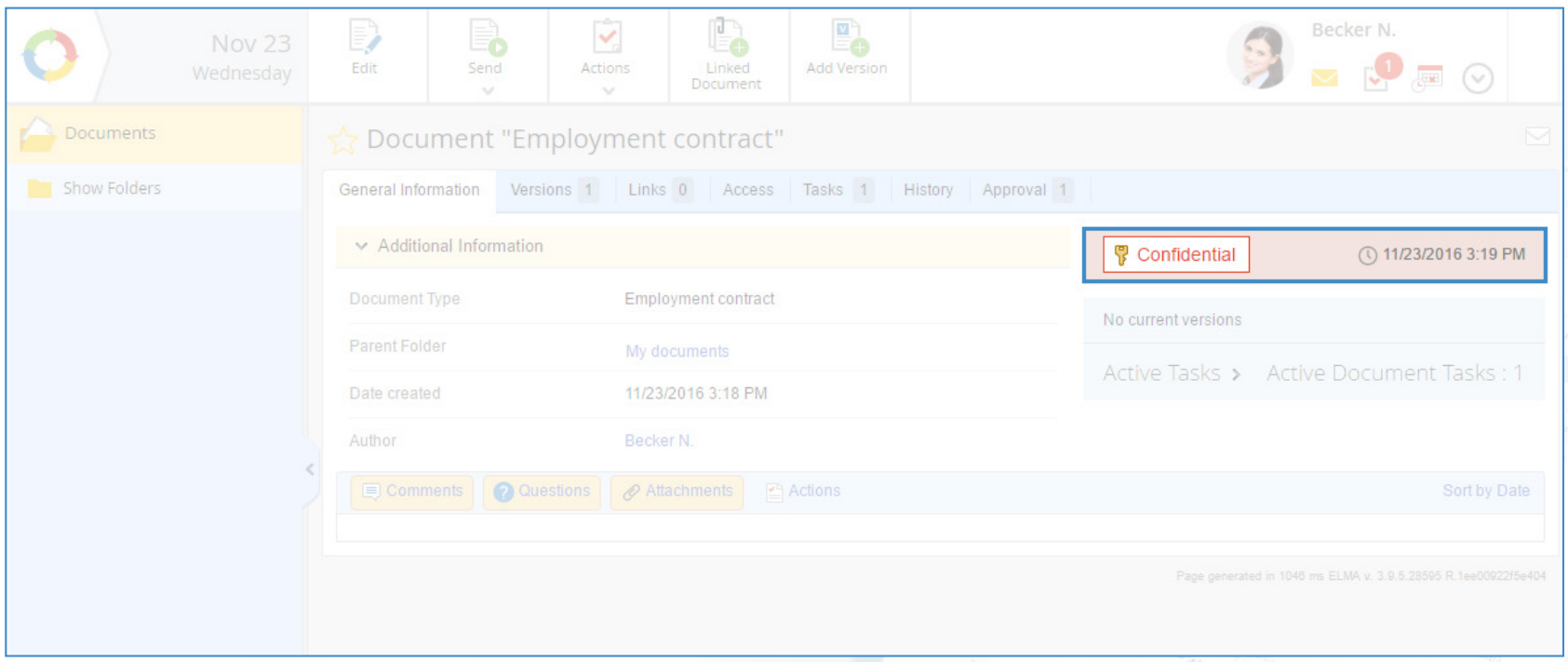




Document Encryption

In ELMA, you can encrypt a document using a password if you want to limit access to the document and guarantee information security. Once a document is encrypted, no one can view or edit it if they do not enter the password.

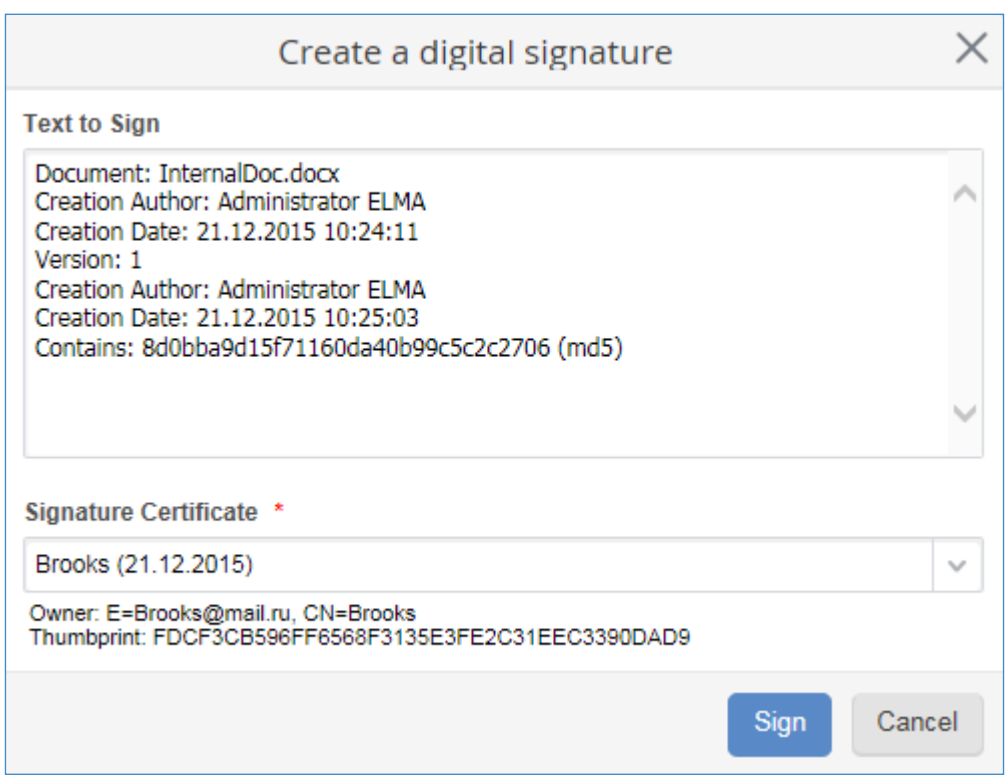


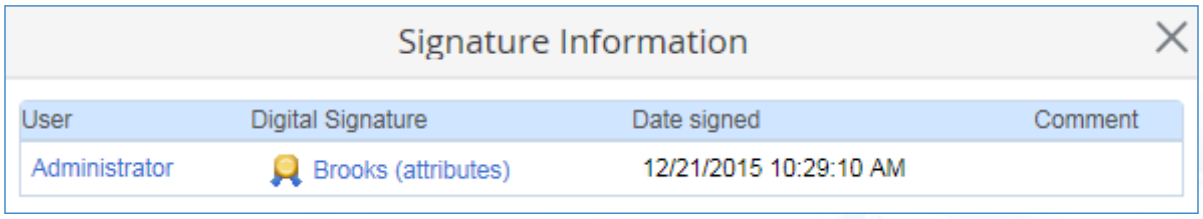


Digital Signature

For better protection of electronic documents, ELMA ECM+ features a digitial signature.

A digital signature authenticates the signer of the document, and is used instead of a handwritten signature in cases recognized by law.



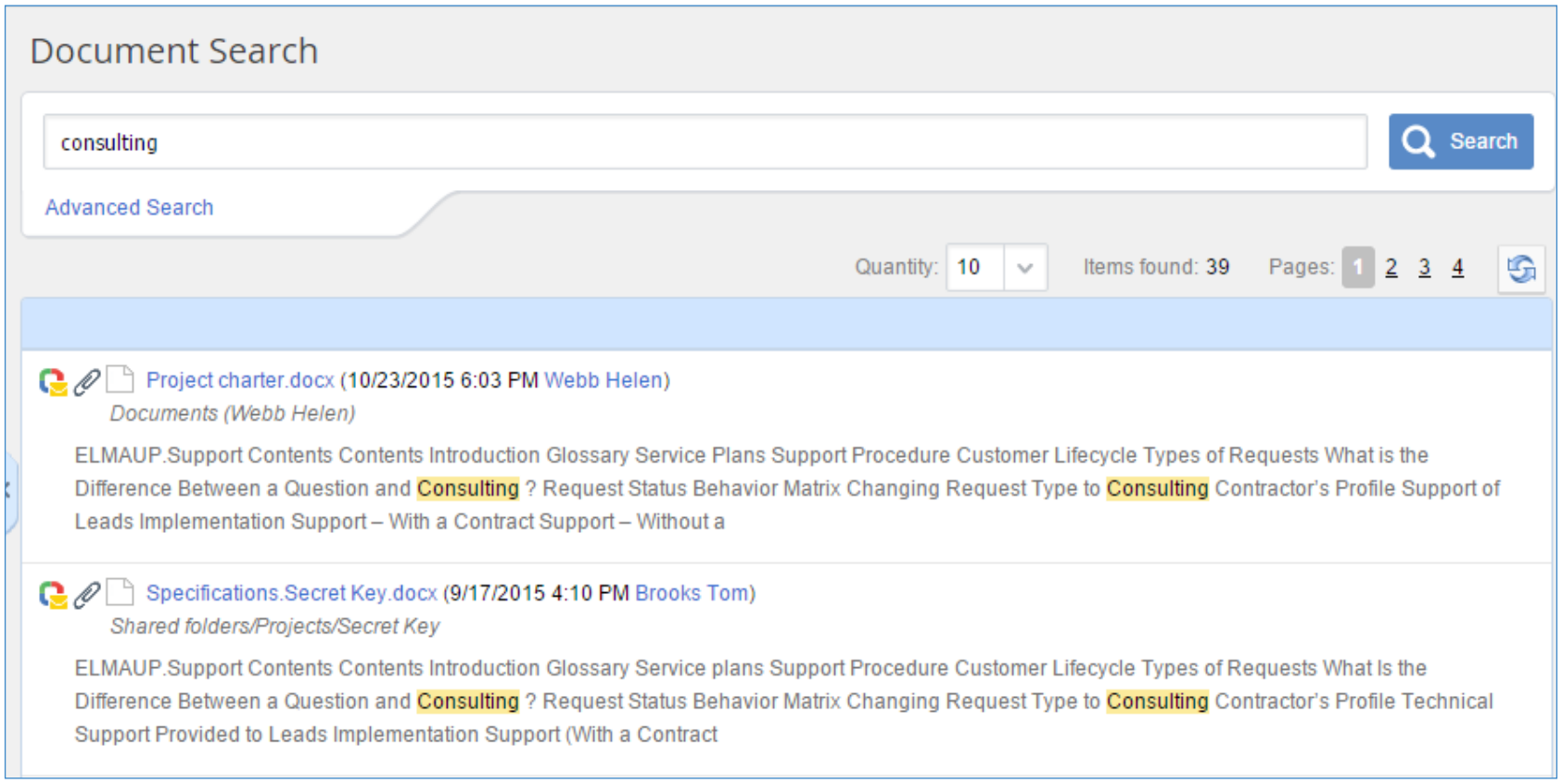


Full Text Search

ELMA BPM features search by attributes and full text search of uploaded documents.

Full text search is performed not only by the document title but also by document attributes and contents. Also, it takes into account the morphology of the input word, meaning that you can search in ELMA like you would search in Google.

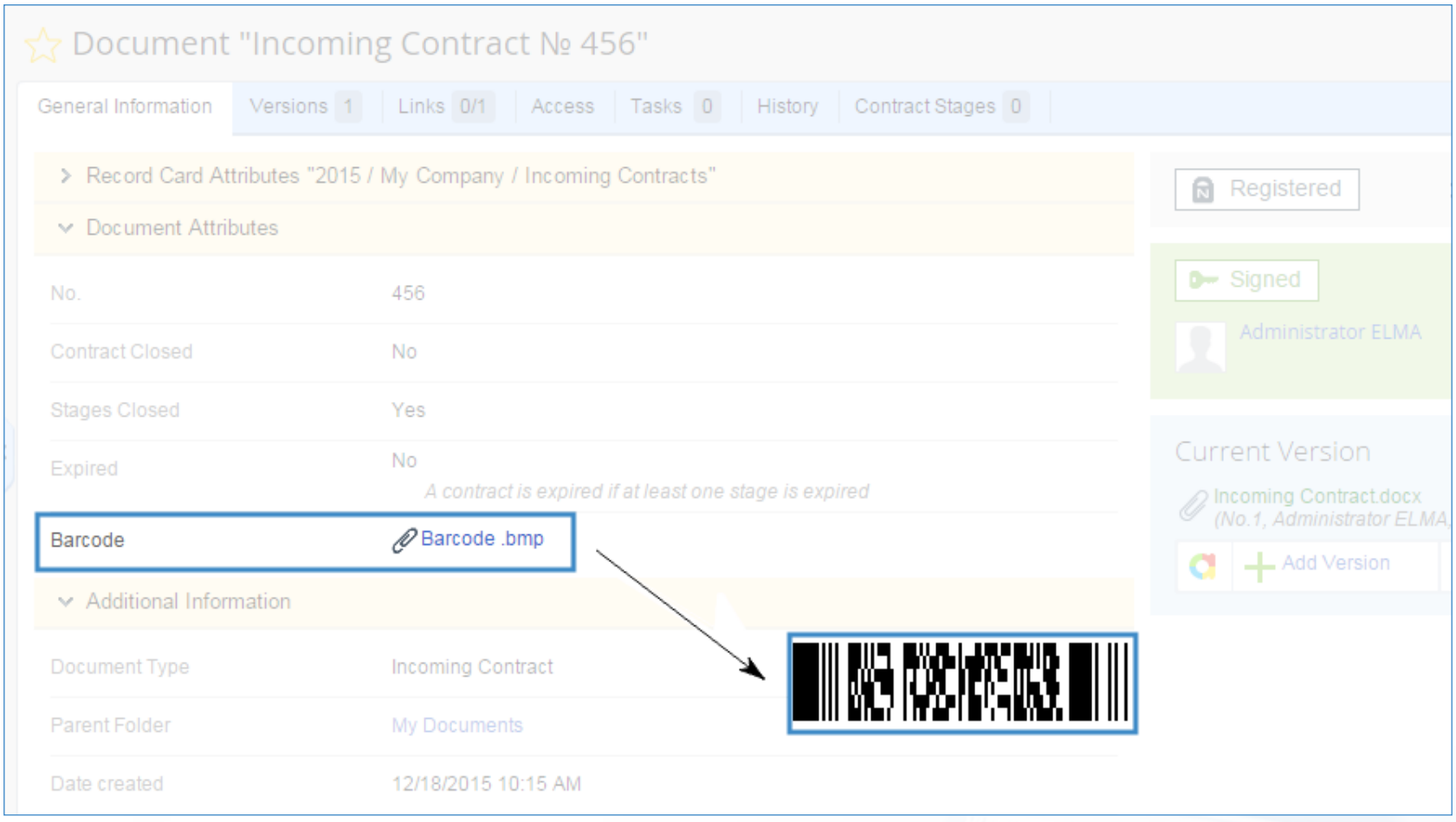
Full text search is provided by indexation providers: Lucene.Net or ElasticSearch.



Barcodes for Documents

Bar-coding is a fast way to identify documents. It allows you to perform quick search of documents in ELMA, and automatically print out a barcode when registering a document.

It is very convenient to use barcodes for document generation. When a document is generated from a template, ELMA can automatically add a barcode to a certain page of the document.



Contract № 84

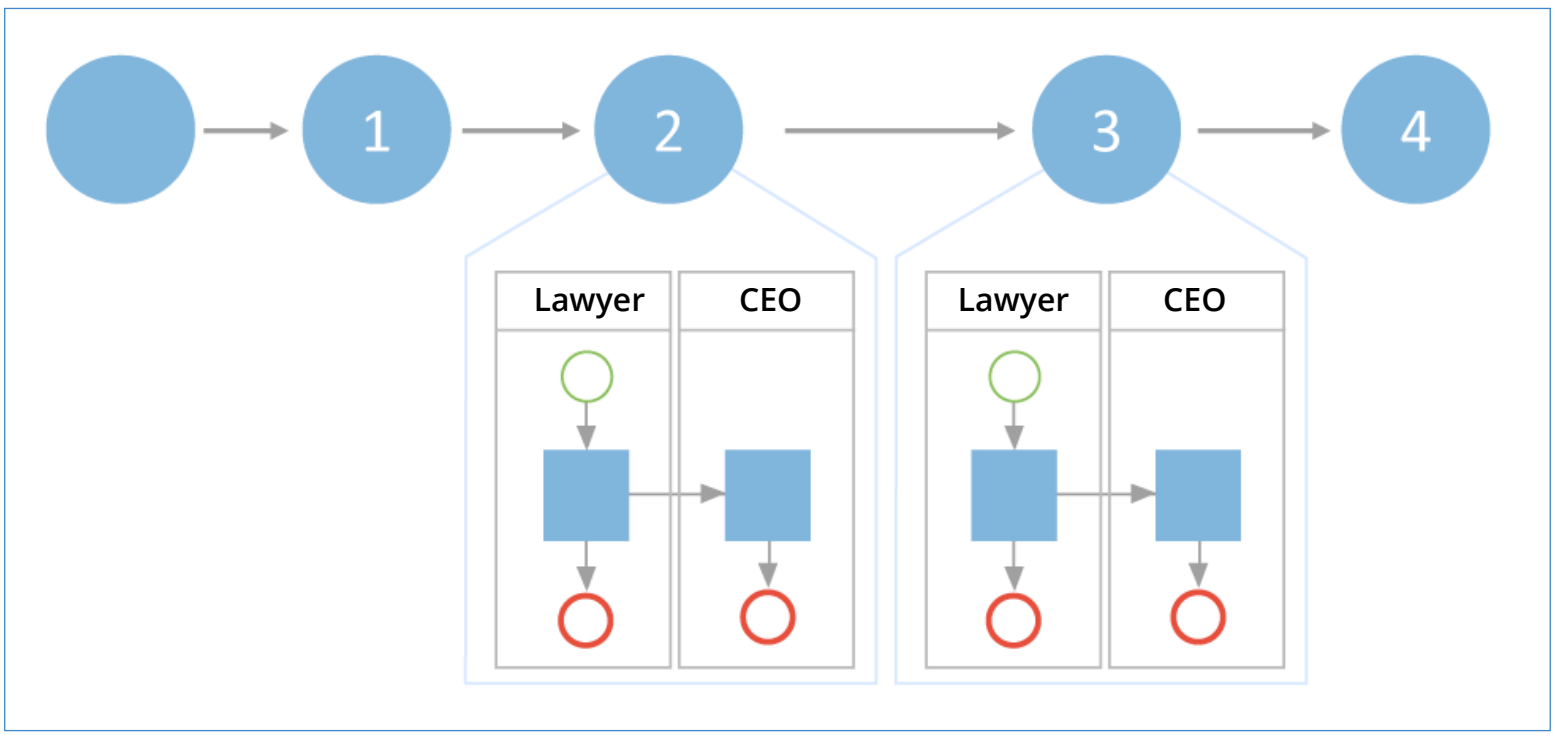
08/06/2015

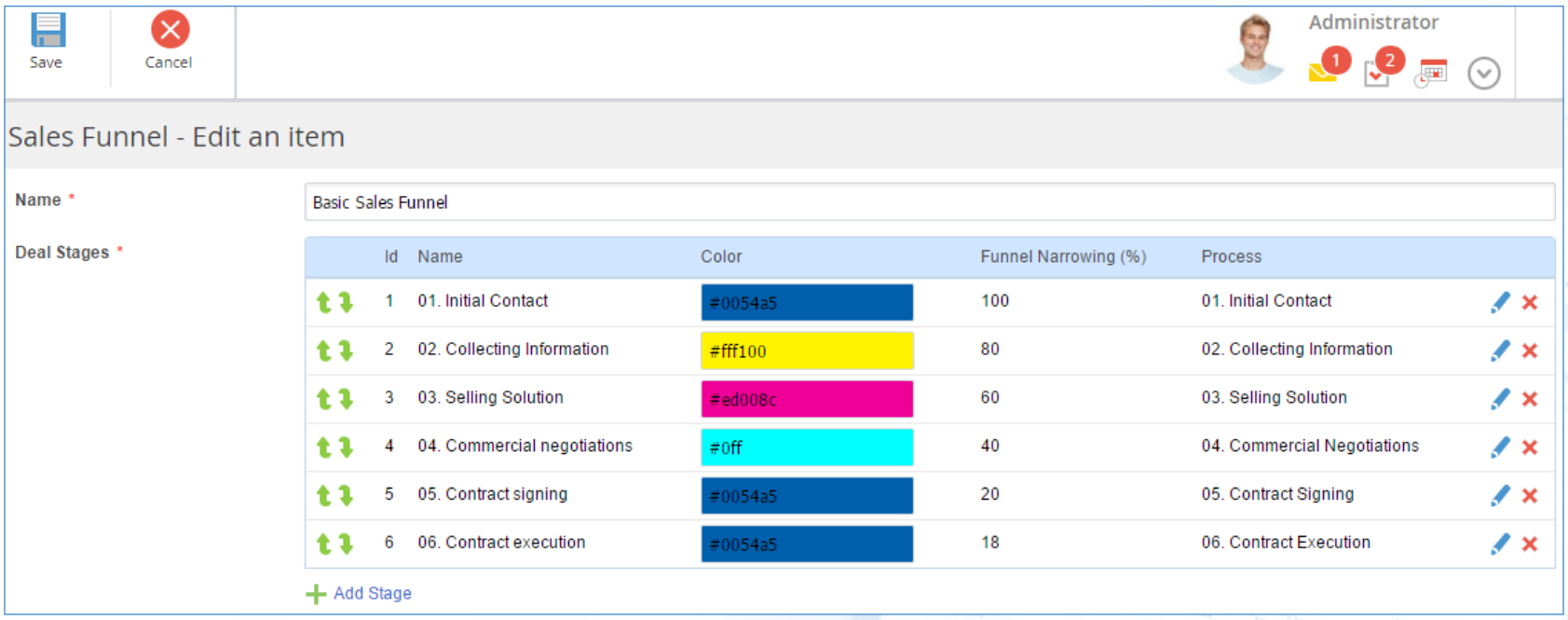
Alfa Ltd. referred hereinafter as Company, and Well Invest Ltd., referred hereinafter as Customer, have concluded this contract as follows:

CAPABILITIES OF ELMA CRM+

Active Sales Funnel

An active sales funnel enables you to use business processes when changing the stages of your deals and to automate routine tasks of sales reps.
With an active sales funnel, you always know which stage the deal is at, and you can make sure that all the required information has been added to ELMA before the stage was updated. For example, when a deal progresses to the “Contract Signing” stage, the sales rep must upload the contract to ELMA, only then can the stage be updated.





Analysis of Sales Dynamics

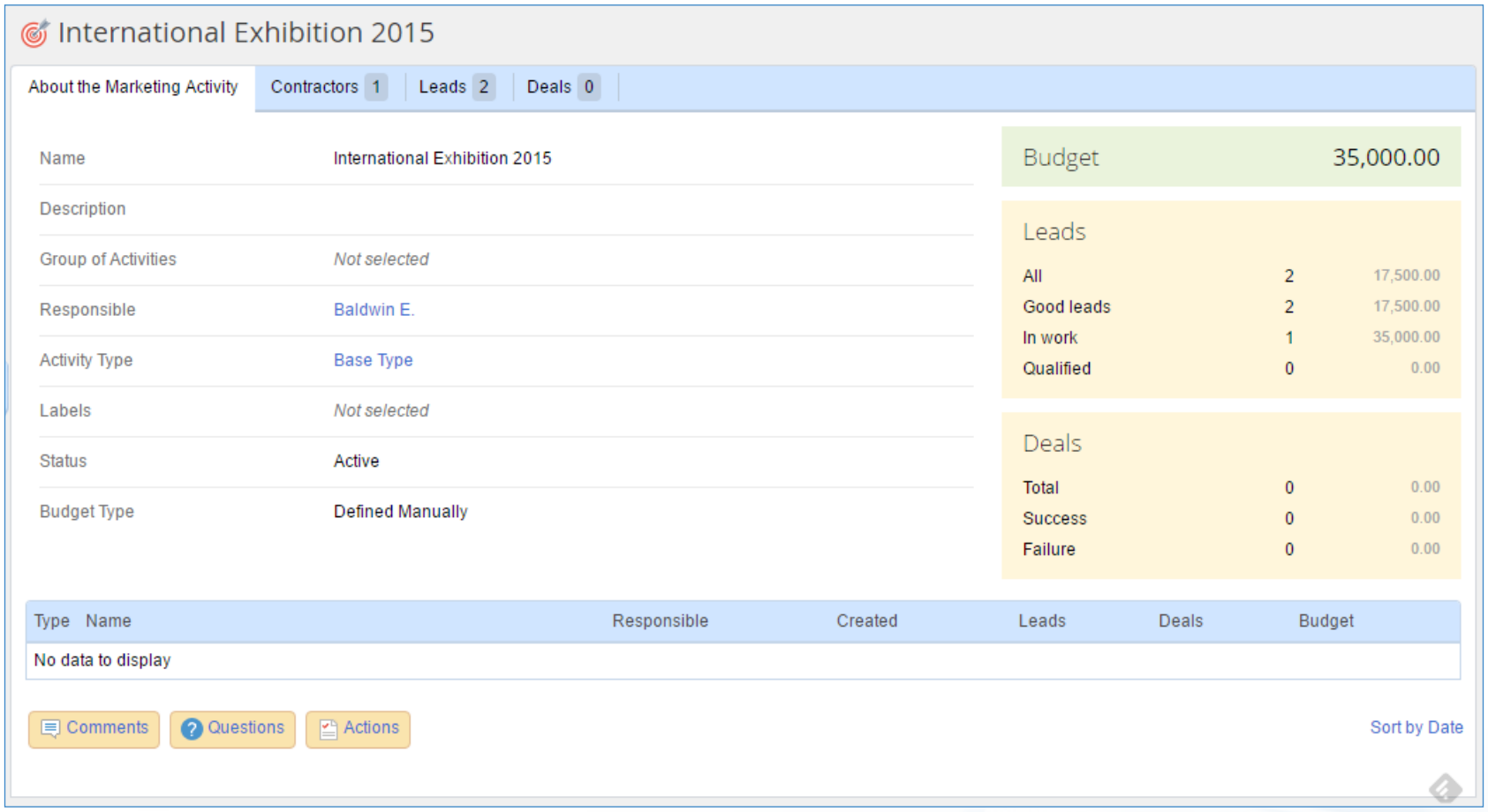
With a reliable sales funnel, you can analyze the dynamics of your deals. Bad dynamics mean that the result will turn out worse than expected.
The Deal Dynamics report visually represents the period under review. The green area contains the deals that have progressed. The red area contains the regressed deals or those that have been closed as unsuccessful. You can draw the report both for the whole company of for selected groups of sales representatives.

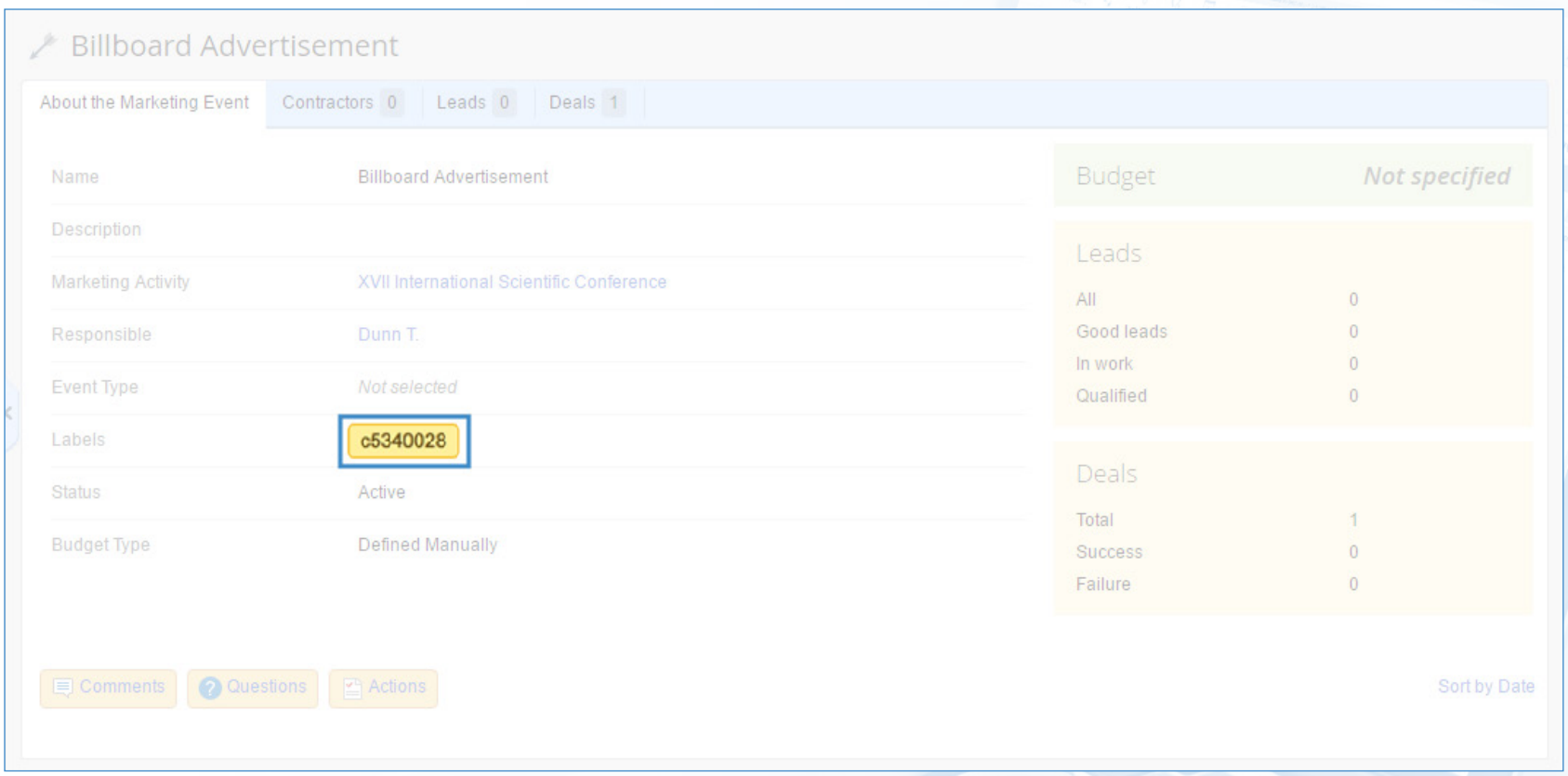
From Stage \ To Stage	<not defined>	01. Initial Contact	02. Collecting Information	03. Selling Solution	04. Commercial negotiations	05. Contract signing	06. Contract execution	Success
<not defined>								
01. Initial Contact		5						
02. Collecting Information			5					
03. Selling Solution				4				
04. Commercial negotiations					5			
05. Contract signing						2		
06. Contract execution								
Failure								

Marketing Activities

The marketing department works on attracting leads. For that, a series of marketing activities is used. These activities are meant to promote the company or its products on the market. To measure the effectiveness of an activity you need to calculate how much money it has brought to the company, but it can be very time-consuming and might require specific resources. In ELMA CRM+, you can automate the evaluation of effectiveness!

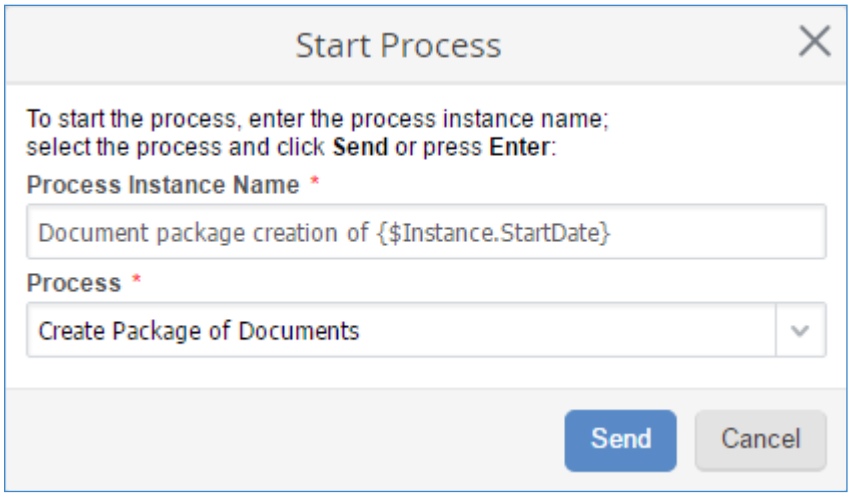
Internet advertising is also very important for product marketing. You can use UTM-parameters when measuring a Google campaign against your marketing activity. It is very simple. Add the same UTM parameters to your Google campaign and to ELMA CRM+. ELMA BPM will then recognize the campaign and will measure its effectiveness. This way, later on, you can calculate how much one lead had cost you and see which campaign had turned out to be the most effective.

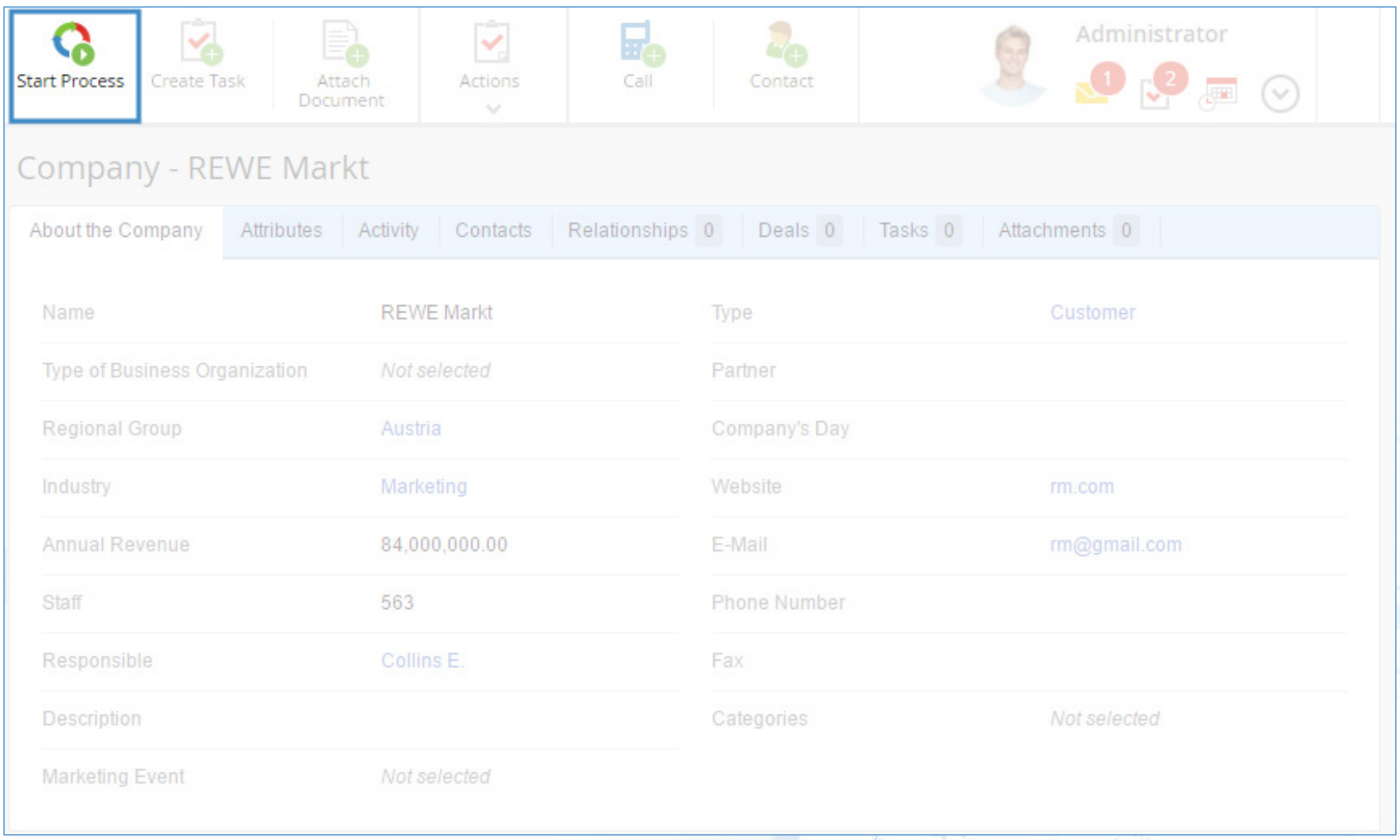




Creating End-to-End Business Processes

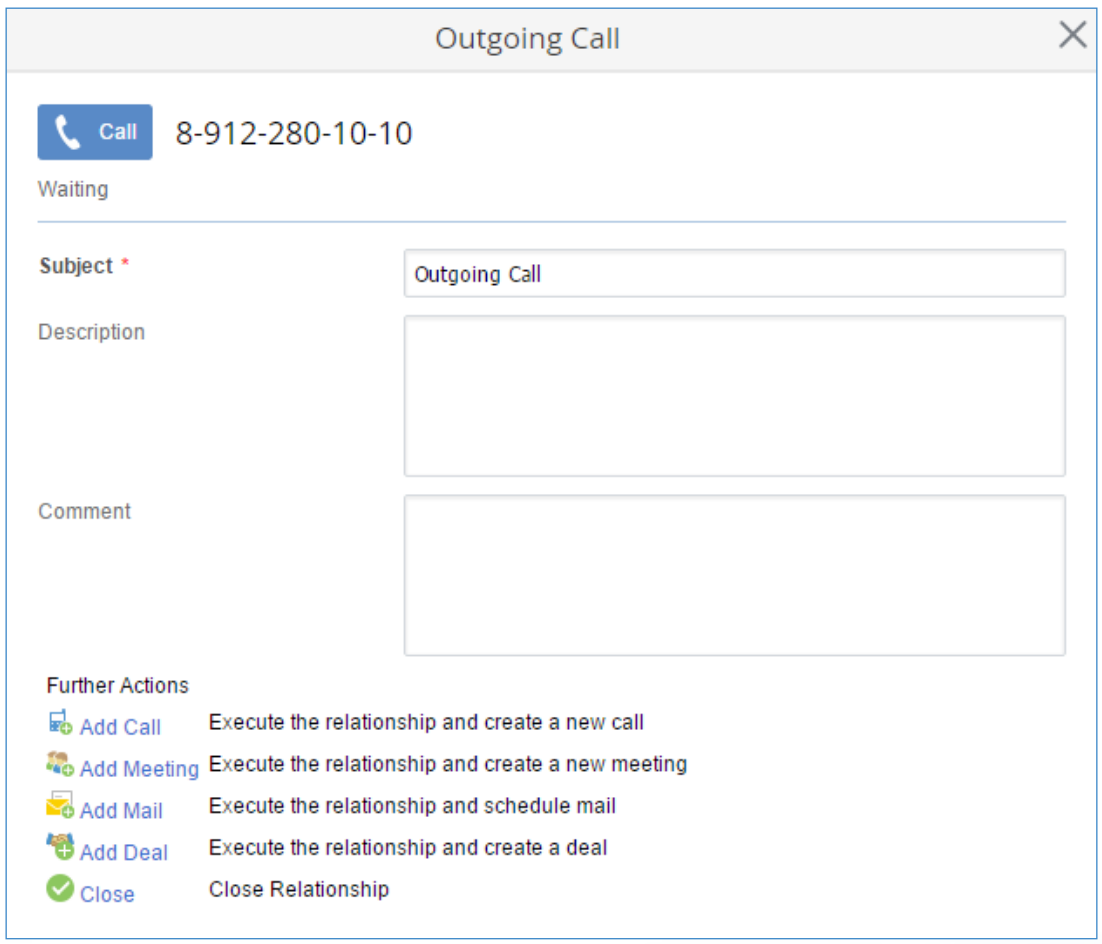
ELMA CRM+ is based on the ELMA BPM platform, meaning that you can describe and design end-to-end sales processes.
ELMA allows for starting a process from an object's page in CRM (for example, from a contractor's page).
Since the process is modeled for a certain CRM object and can be started from its page, it is necessary to link the process to the CRM object when modeling it.

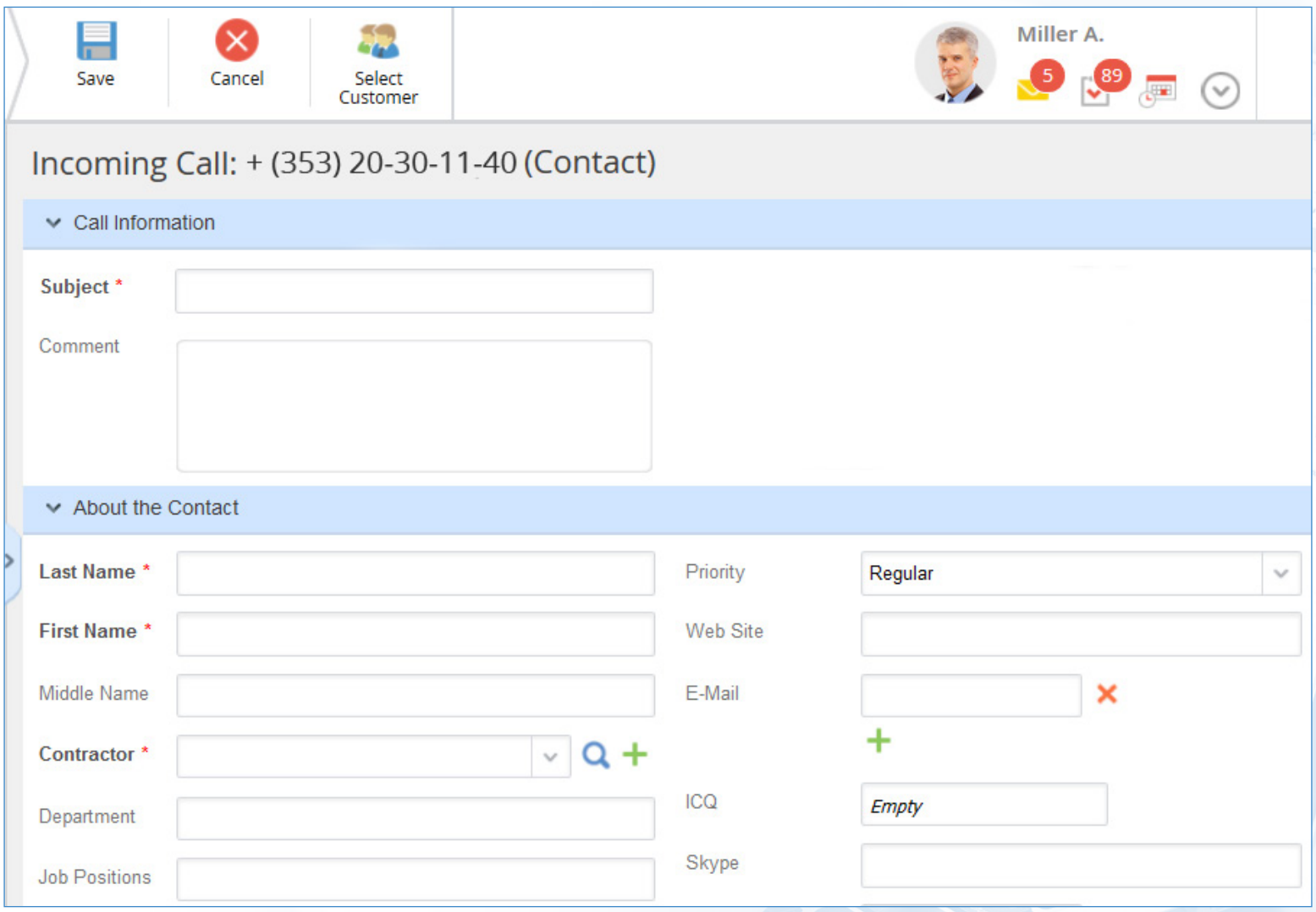




Integration with IP Telephony

Integration with IP telephony means that you can use your computer to make phone calls; ELMA can display all the information about the client, as well as your relationship history with them.
ELMA CRM+ allows for integration with the Asterisk IP telephony.



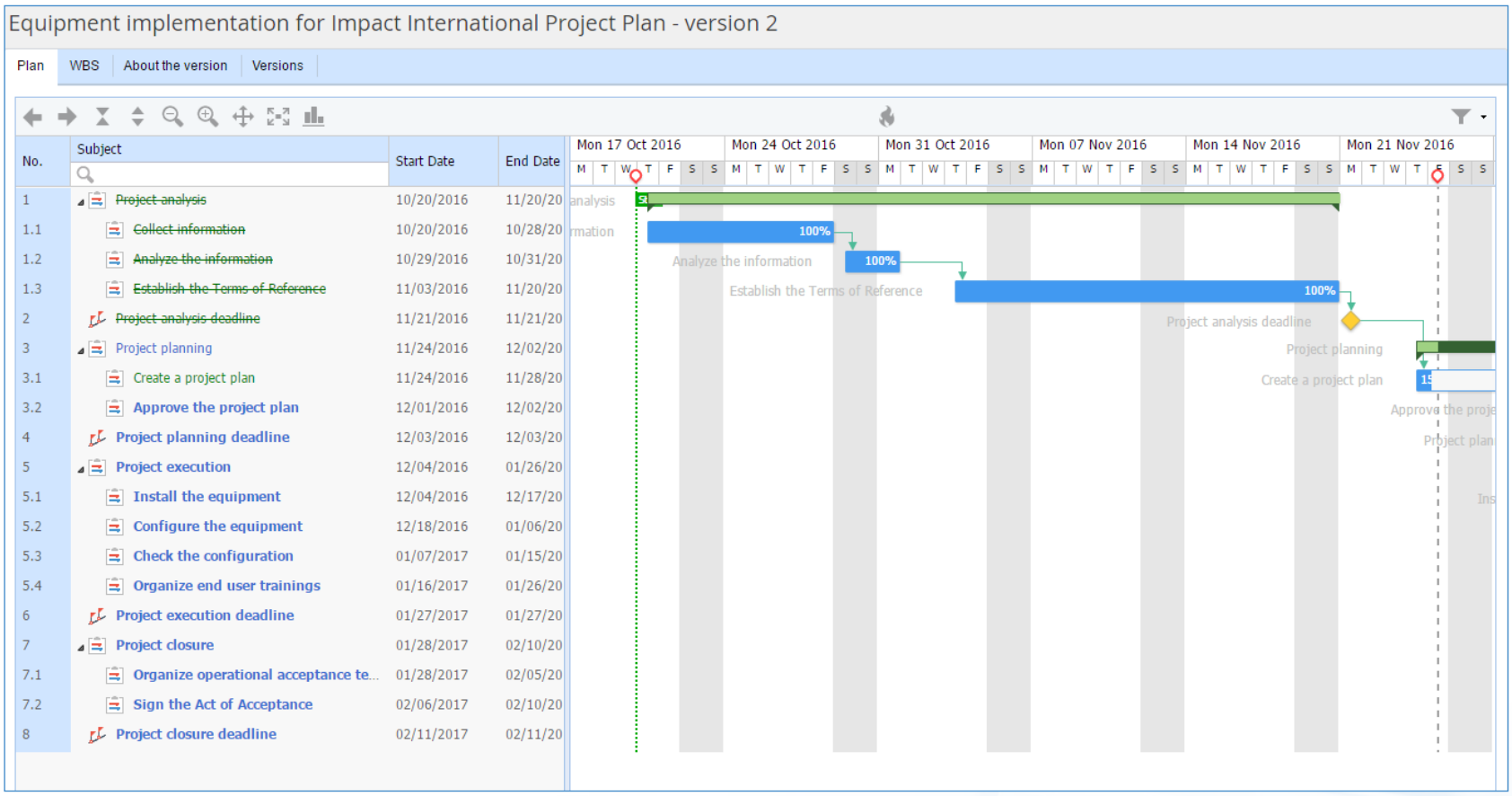


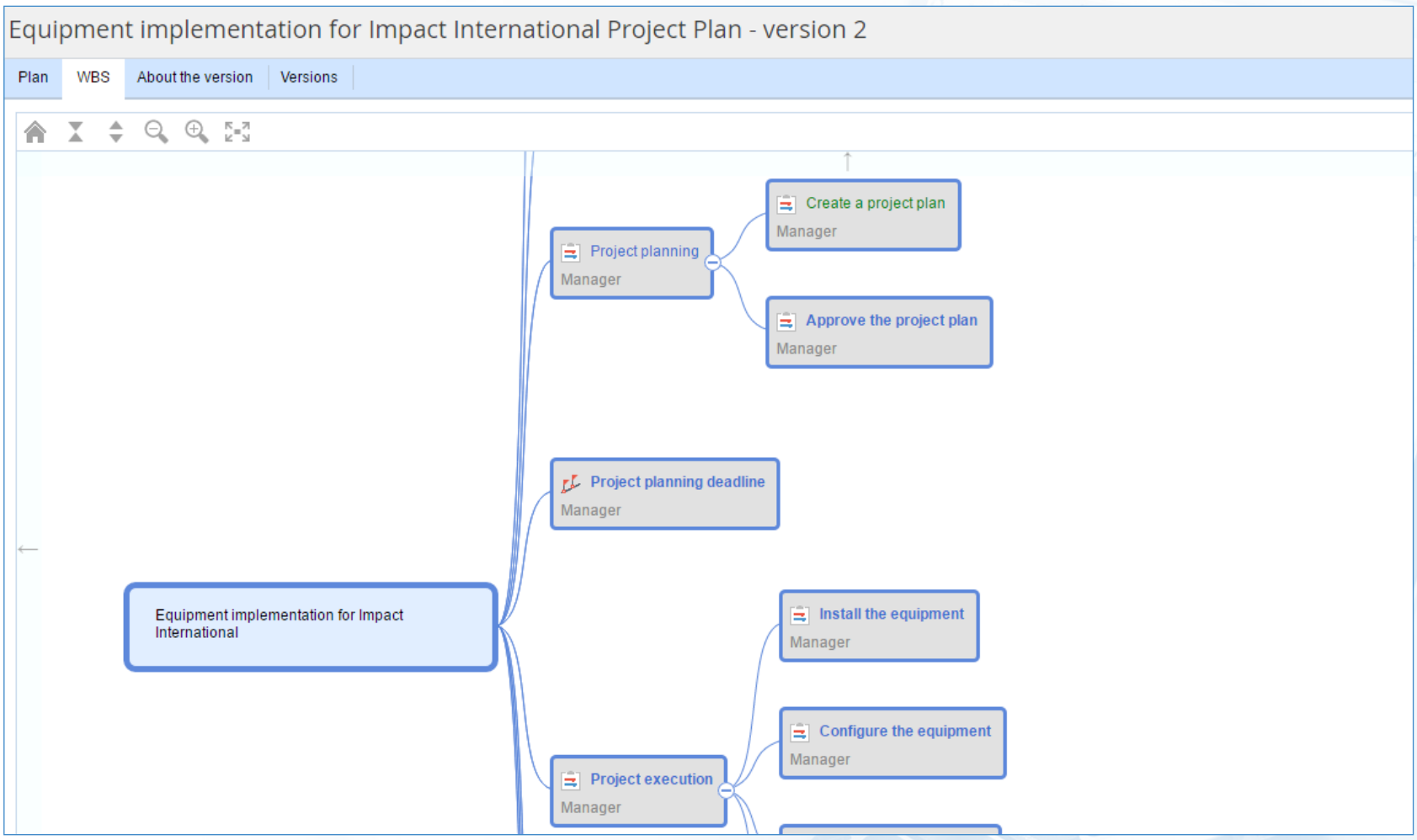
PROJECTS+

Project Plan

In ELMA, you can create a project plan and manage the schedule and the work scope. ELMA Projects+ is compatible with MS Project plans.

A project plan can be displayed as a Gantt chart or as a Mindmap. For some projects, the latter is much more convenient. Also, in the Mindmap mode, users can edit the project plan. This is rather useful for creating the Work Breakdown Structure or for managing internal projects, when time limits are less important than defining the structure and the work scope.

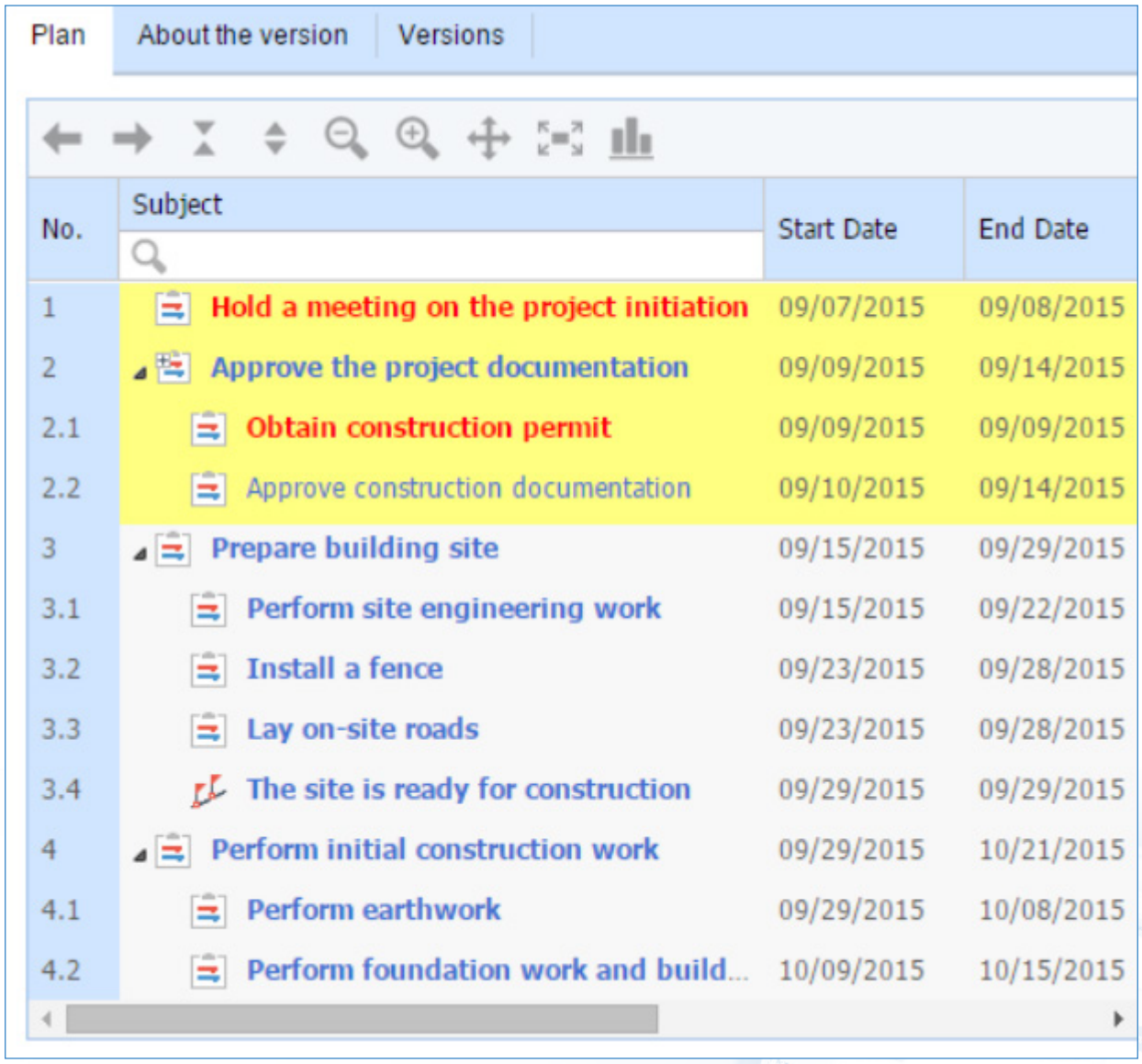


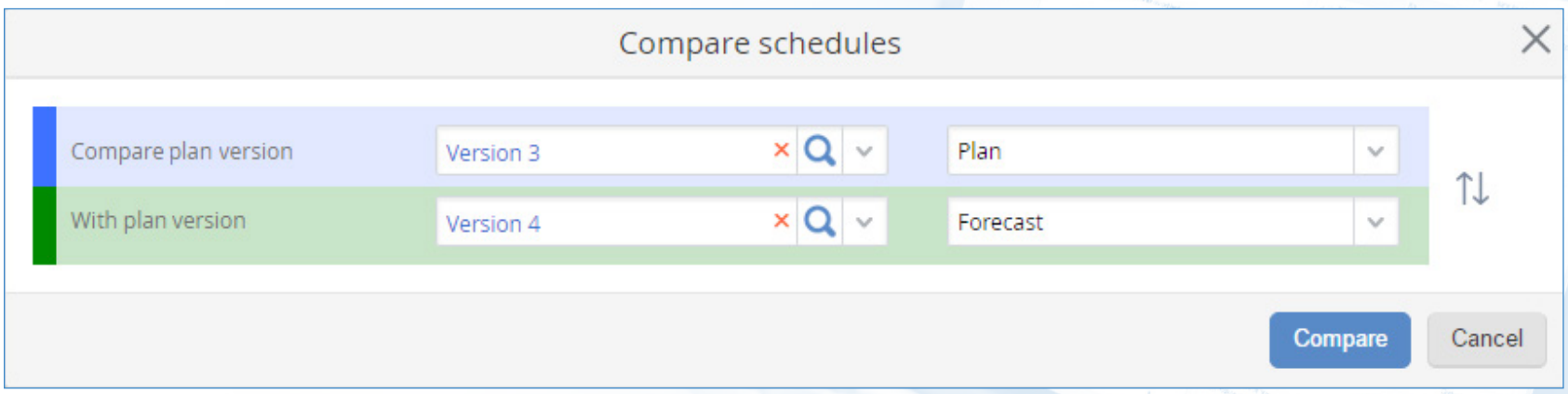


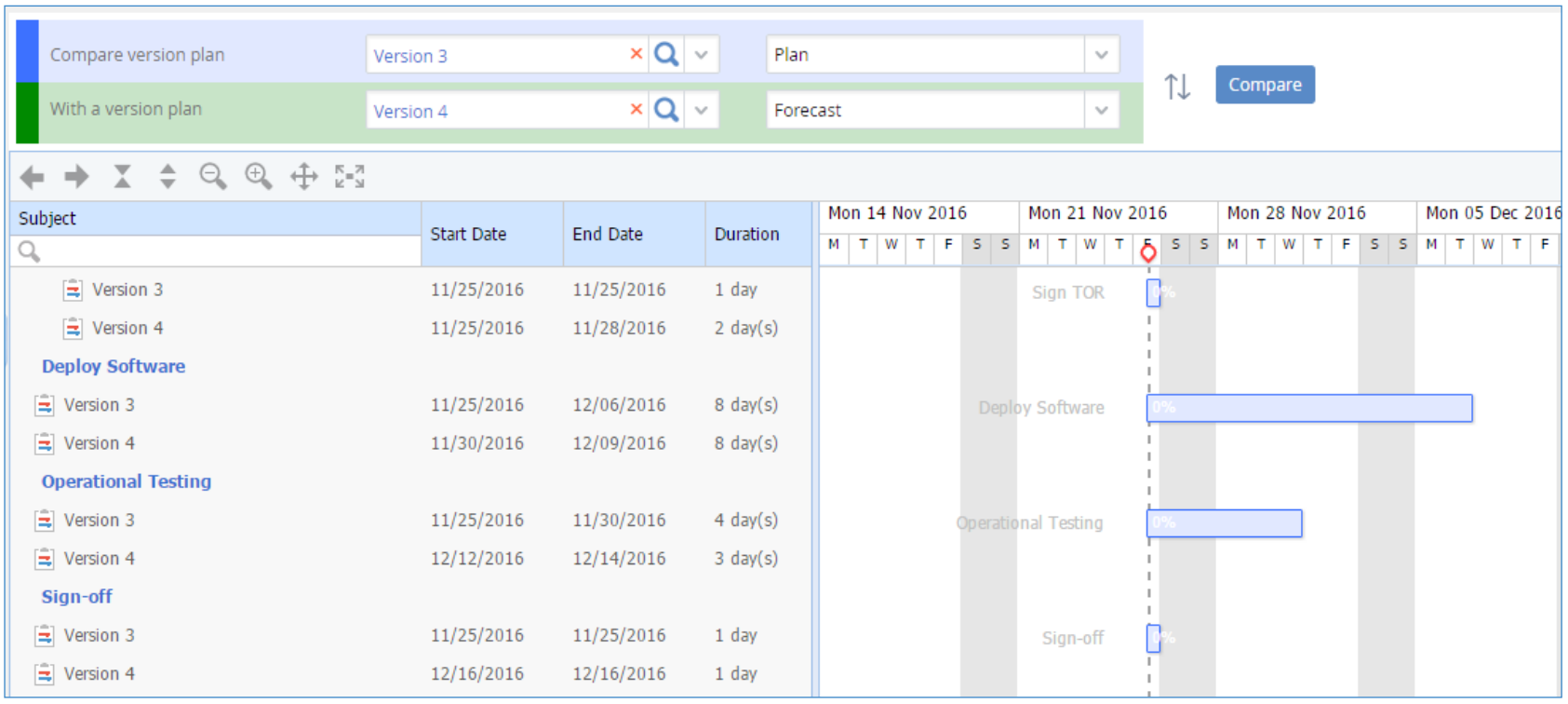
Project Plan Monitoring

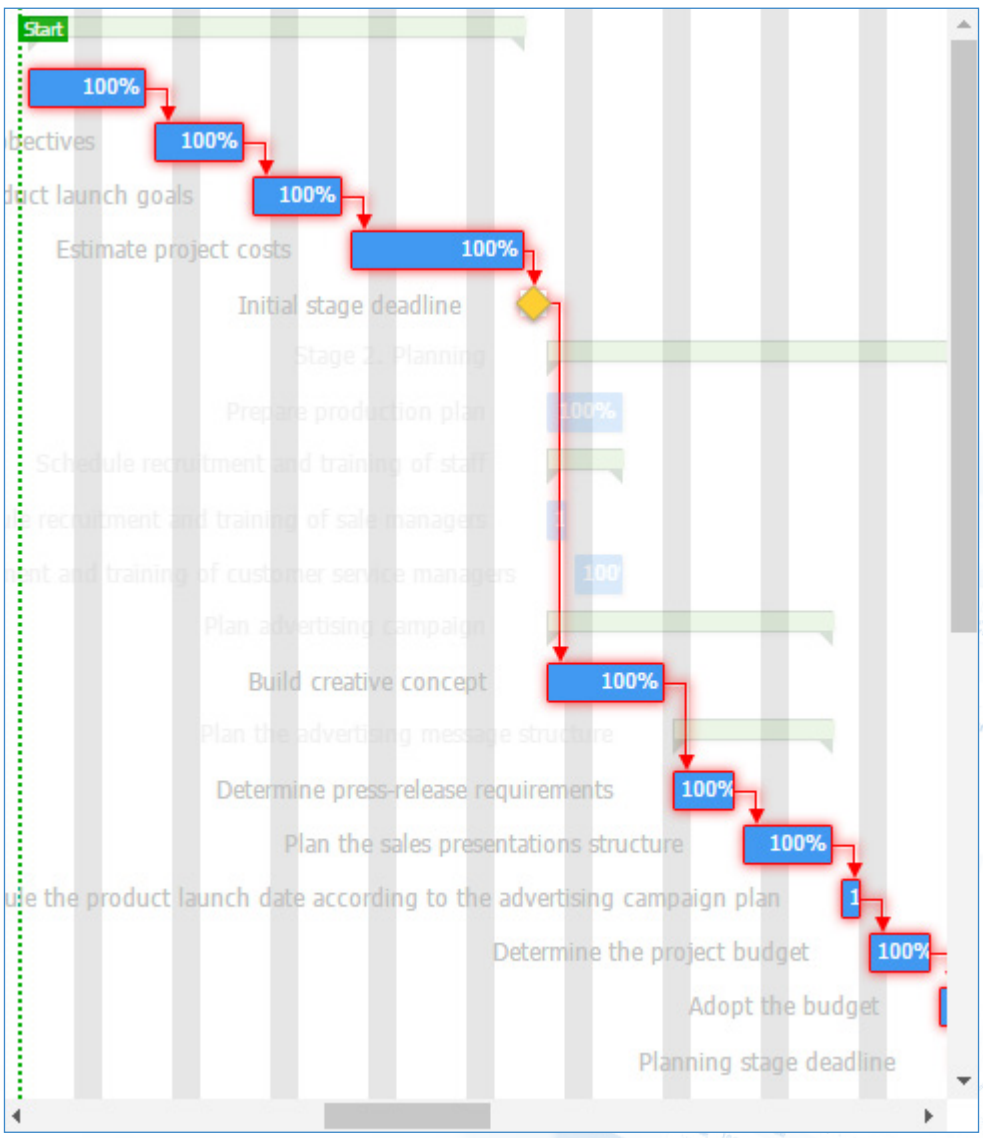
ELMA Projects+ assigns tasks according to the project plan. You can always see the current state of the project and check how the tasks are executed. For that, ELMA BPM features task statuses. A diagram shows which tasks are completed, overdue or in progress.

There are other useful features in ELMA Projects+. For example, you can compare two versions of a project plan and see how they are different, especially as far as the completion schedule is concerned. ELMA compares the predicted start and end dates as well as tasks executors and other standard attributes.
Another useful feature is seeing the critical path of your project in just one click.



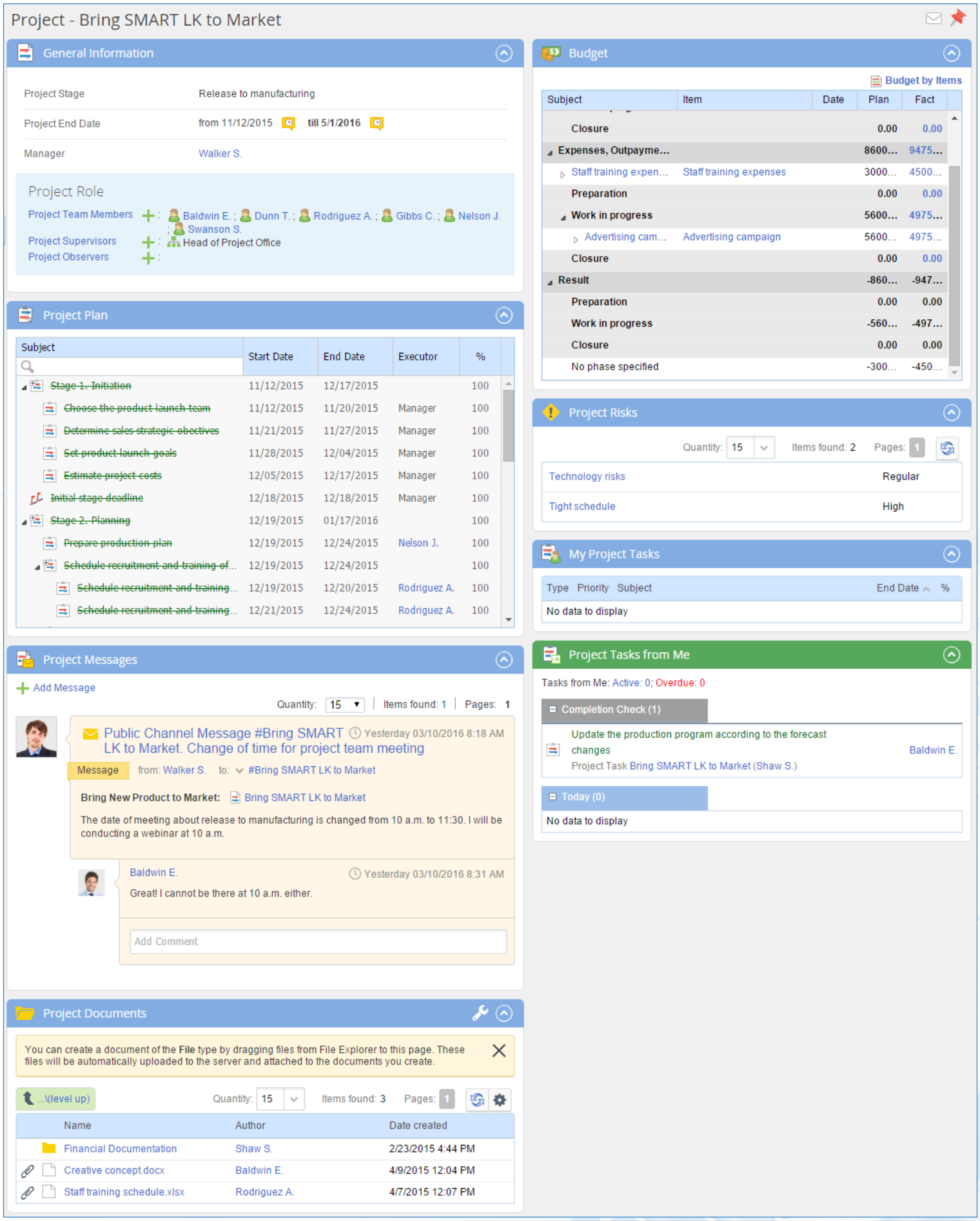



Compare version plan
Version 3
Plan
With a version plan
Version 4
Forecast
Compare
Subject
Start Date
End Date
Duration
Version 3 11/25/2016 11/25/2016 1 day
Version 4 11/25/2016 11/28/2016 2 day(s)
Deploy Software
Version 3 11/25/2016 12/06/2016 8 day(s)
Version 4 11/30/2016 12/09/2016 8 day(s)
Operational Testing
Version 3 11/25/2016 11/30/2016 4 day(s)
Version 4 12/12/2016 12/14/2016 3 day(s)
Sign-off
Version 3 11/25/2016 11/25/2016 1 day
Version 4 12/16/2016 12/16/2016 1 day
Mon 14 Nov 2016
Mon 21 Nov 2016
Mon 28 Nov 2016
Mon 05 Dec 2016
Sign TOR
Deploy Software
Operational Testing
Sign-off


Start
100%
Estimate project costs
Initial stage deadline
Build creative concept
Determine press-release requirements
Plan the sales presentations structure
Determine the project budget
Adopt the budget
Planning stage deadline

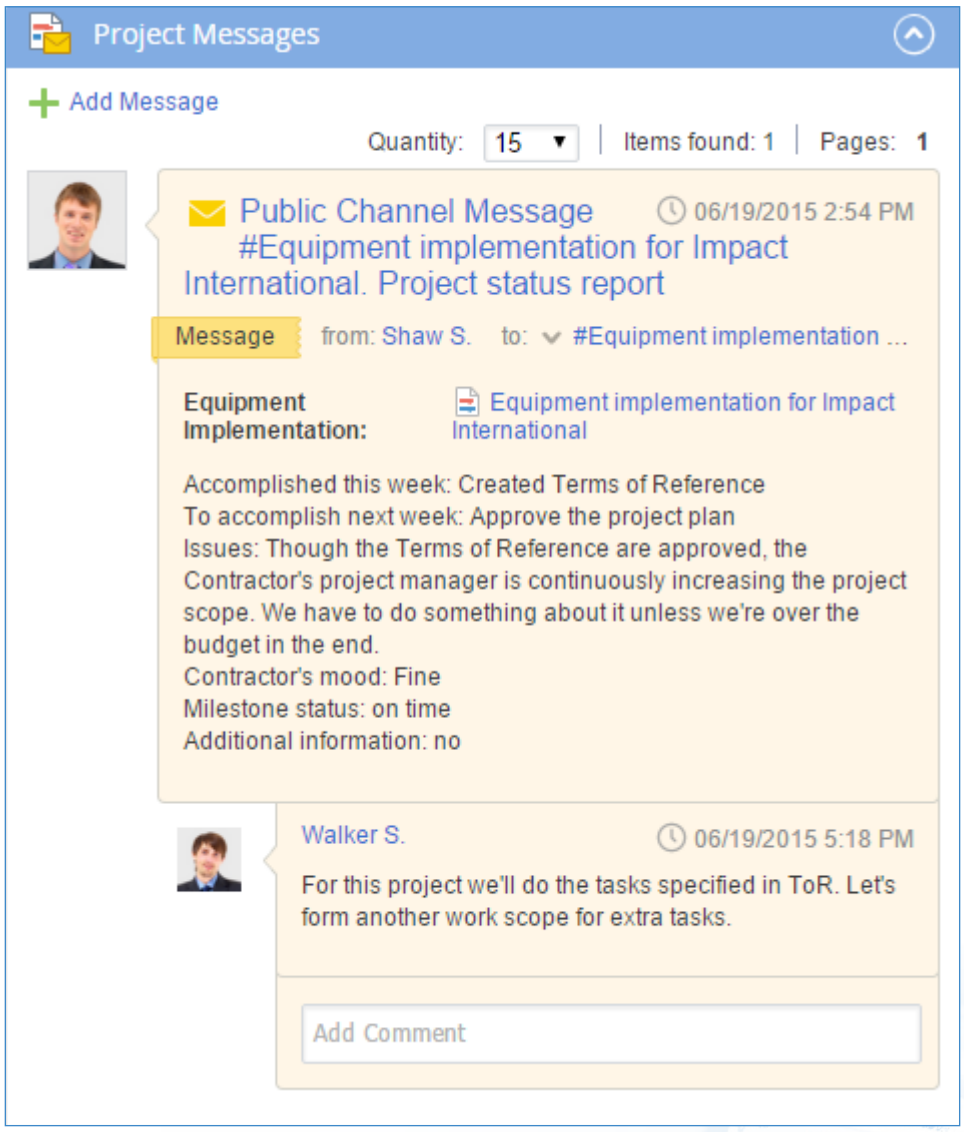
Shared Information Space

For project managers, ELMA Projects+ offers a very convenient working space that contains all the features necessary for project management:
• General information about the project
• Project plan and project tasks
• Comments and discussions
• Project budget
• Documentation
• Project risks
All this information is displayed on the project page in portlets, which can be laid out as you wish. If you want to see more details, just click on a portlet's name to open full information.



Communication

In ELMA, communication is easy. We pay a lot of attention to information security and fast information exchange.
Users can discuss projects and talk in messaging channels. Also, they can add documents and files to their messages.
All the project-related messages are displayed in a special portlet on the project page. This way, all the communication concerning the project is held in one place.

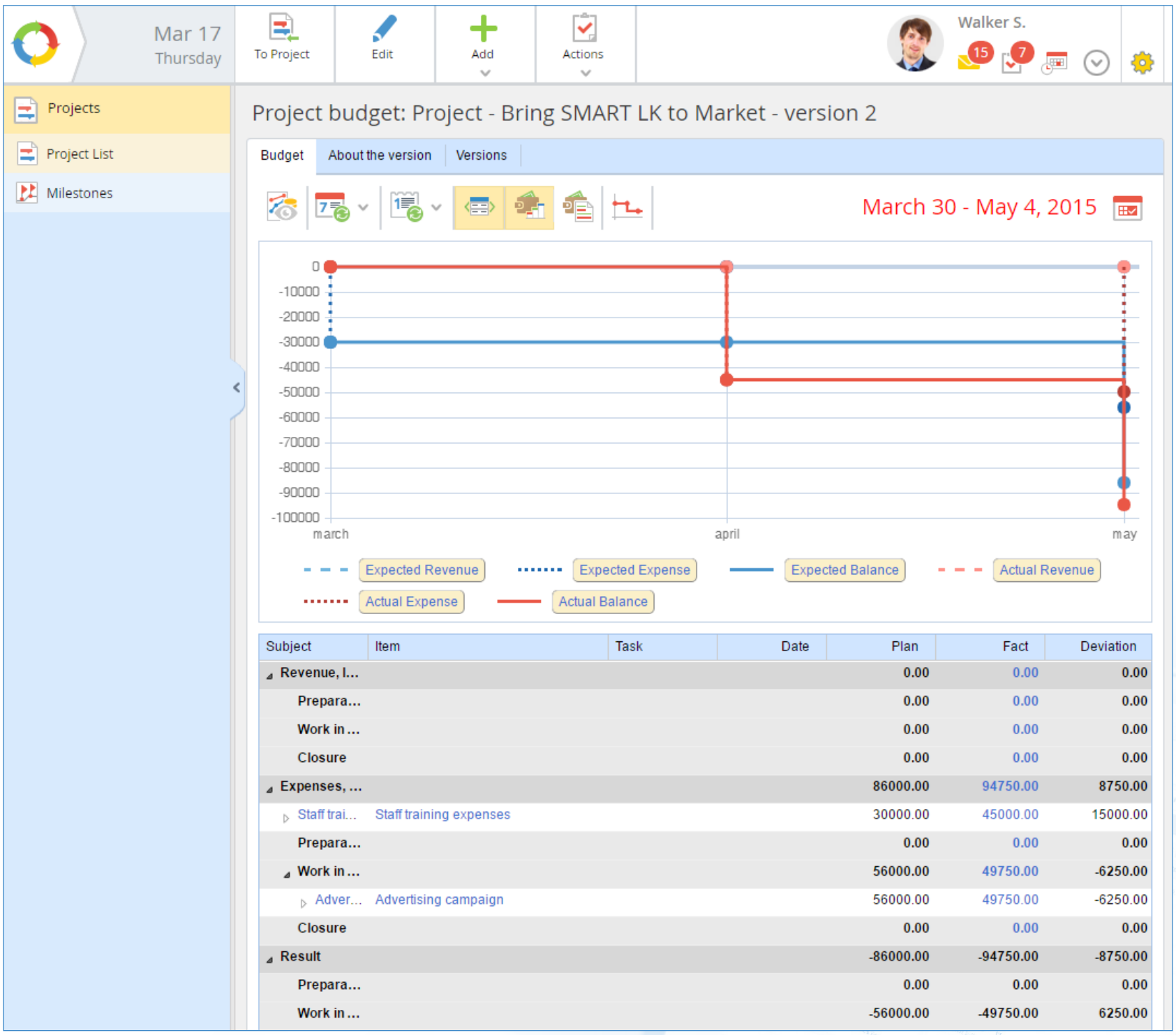


Project Budget Control

In ELMA Projects+, you can manage the project budget and account all the payments and revenues. For each project, you can create a set of items, enter estimated revenues and expenses, and calculate actual revenues and expenses according to actual documents.

Actual expenses and revenues are documented in ELMA and can be sent for approval, acquaintance, or routed according to the workflow. This makes the project budget very transparent; you can always check the account activity and see who is responsible for this or that item.

In addition, users can create budget reports to check the budget items over a certain period. A report can display estimated and actual values together or separately.



Subject	Item	Task	Date	Plan	Fact	Deviation
Revenue, l...				0.00	0.00	0.00
Prepara...				0.00	0.00	0.00
Work in ...				0.00	0.00	0.00
Closure				0.00	0.00	0.00
Expenses, ...				86000.00	94750.00	8750.00
Staff trai...	Staff training expenses			30000.00	45000.00	15000.00
Prepara...				0.00	0.00	0.00
Work in ...				56000.00	49750.00	-6250.00
Adver...	Advertising campaign			56000.00	49750.00	-6250.00
Closure				0.00	0.00	0.00
Result				-86000.00	-94750.00	-8750.00
Prepara...				0.00	0.00	0.00
Work in ...				-56000.00	-49750.00	6250.00

Financial Documentation

Shared Folders \ Projects \ Bring SMART LK to Market \ Financial Documentation

Search

Search

Advanced Search

...\(level up)

Quantity: 15 Items found: 2 Pages: 1

Name	Author	Date created
Advertising campaign.docx of 1/3/2015	Walker S.	5/3/2015 7:16 PM
Staff expenses.docx of 5/3/2015	Walker S.	4/15/2015 7:25 PM
Advertising campaign.docx of 4/15/2015	Walker S.	5/3/2015 7:16 PM
Staff training expenses.docx of 5/15/2015	Walker S.	4/15/2015 7:25 PM

Mar 21
Monday

To Project

Walker S.

15 5

Projects

Project List

Milestones

Budget by Periods

Display Period: Quarter

Display Mode: Plan / Fact

End Date: 11/22/2015 to 05/11/2016

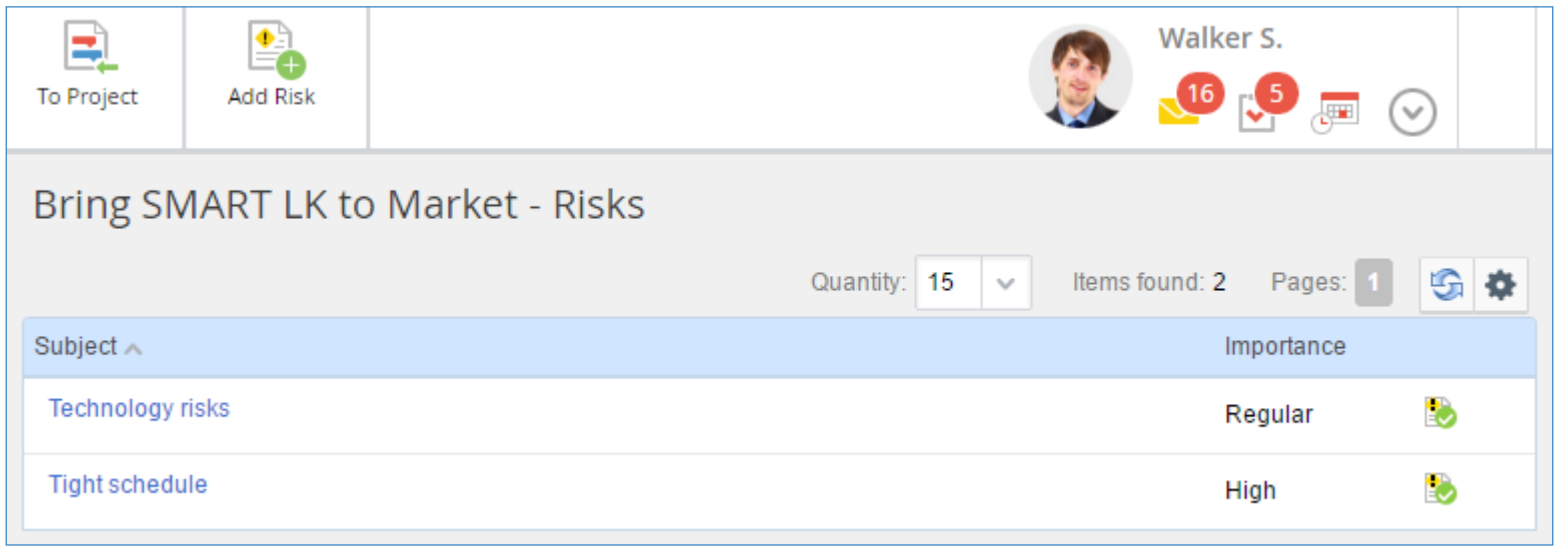
Show Export

Items	IV - 2015		I - 2016		II - 2016	
	Plan	Fact	Plan	Fact	Plan	Fact
Revenue, Inpayments	**175000**	**165000**	**224000**	**164300**	**686000**	**627000**
Expenses, Outpayments	**116000**	**88000**	**84000**	**75000**	**229400**	**225000**
Advertising campaign	76000	58000	54000	52000	119000	125000
Staff training expenses	40000	30000	30000	23000	110400	100000
Result	**59000**	**77000**	**140000**	**156800**	**456600**	**402000**

Risk Management

When managing a project, it is extremely important to foresee all the possible problems and issues that could influence the outcome. In ELMA Project+, we incorporated a risk management feature specifically for that purpose.

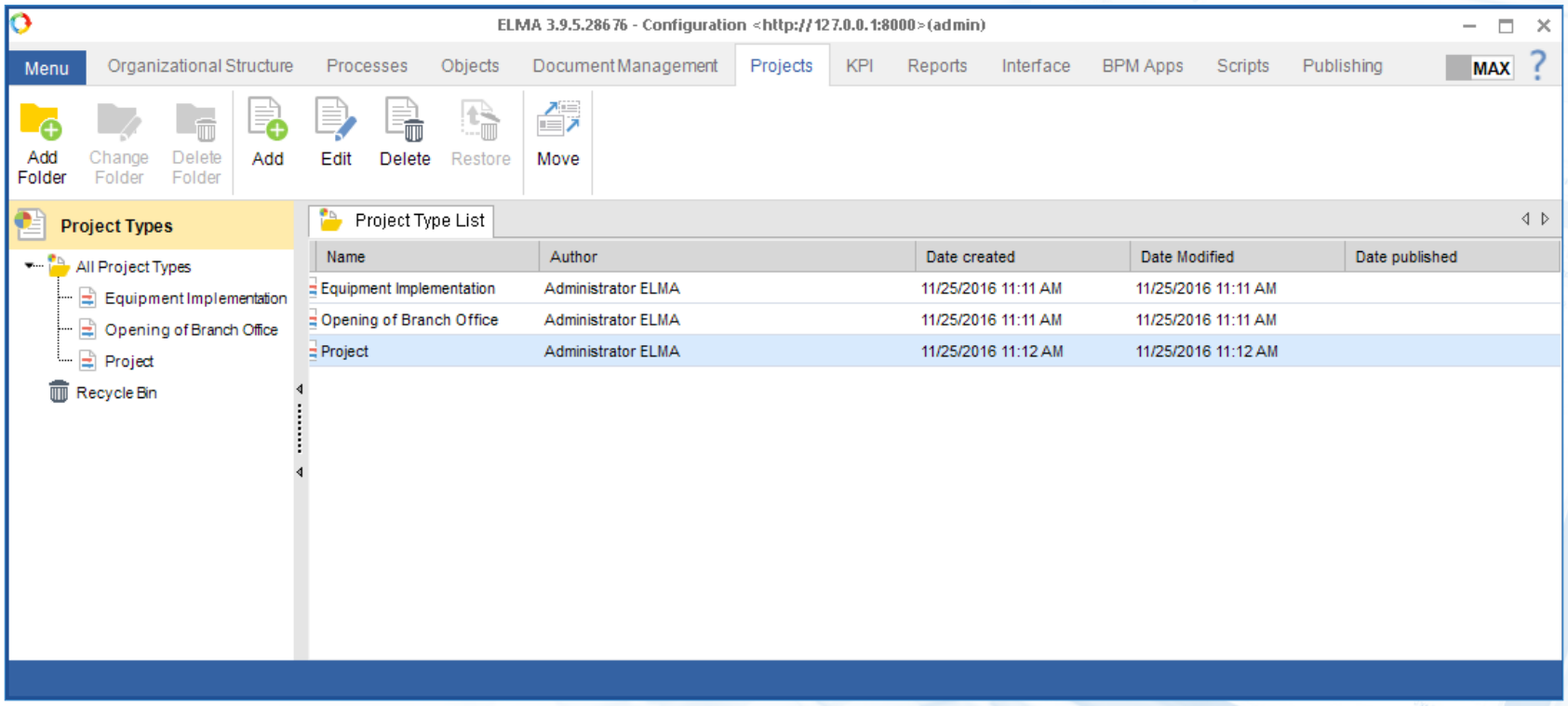
Project risks are listed on the project page so that they are always visible to the manager. When created, each risk is rated in order to specify its importance and potential danger.



Modeling Project Types

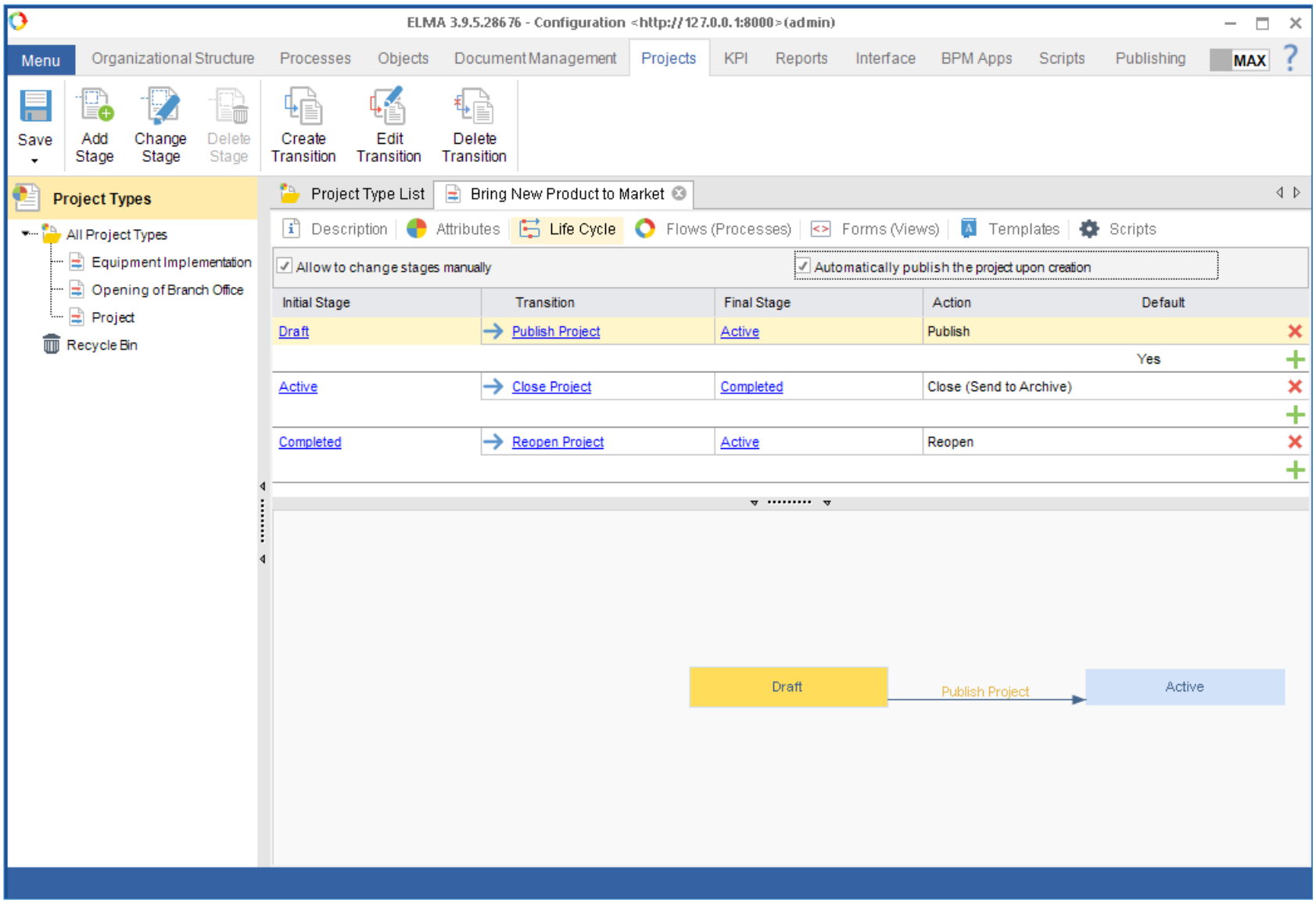
Project conveyor is a special approach for quick delivery of standard projects by means of optimizing the most common procedures. Modeling project types is an integral part of setting up the project conveyor. First, you need to define the most common project types in your organization. Then, for each type, you specify a lifecycle, regulations, stages, typical risks, and model the object display forms.

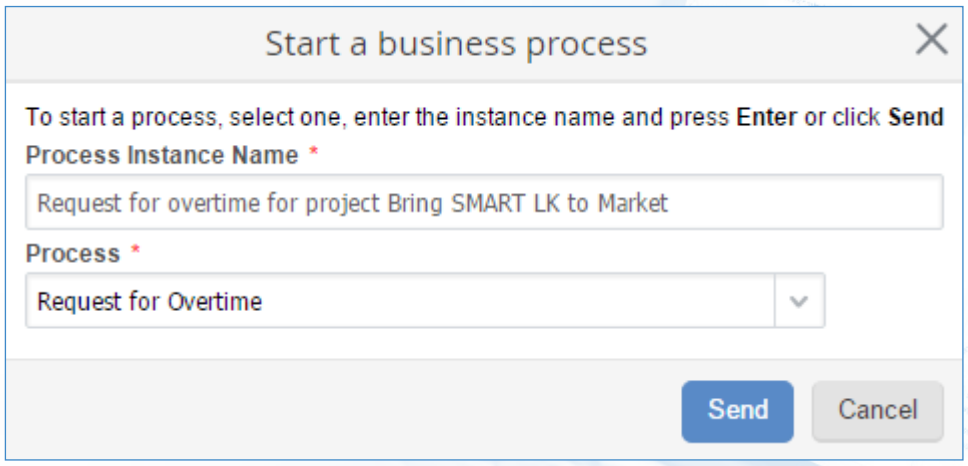
This technology ensures that the repeated stages of standard projects are executed with precision, thus allowing for higher performance and lower expenses.

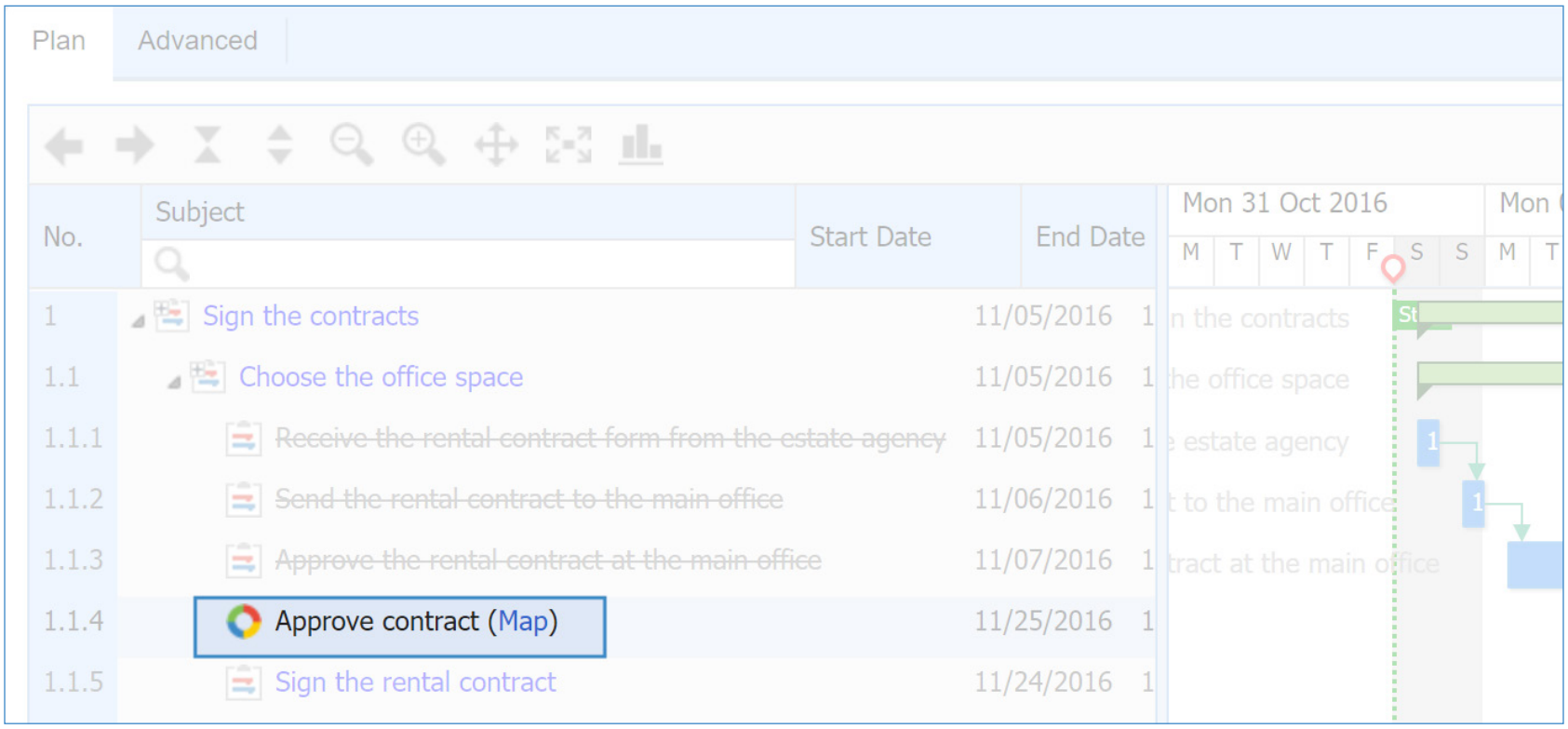


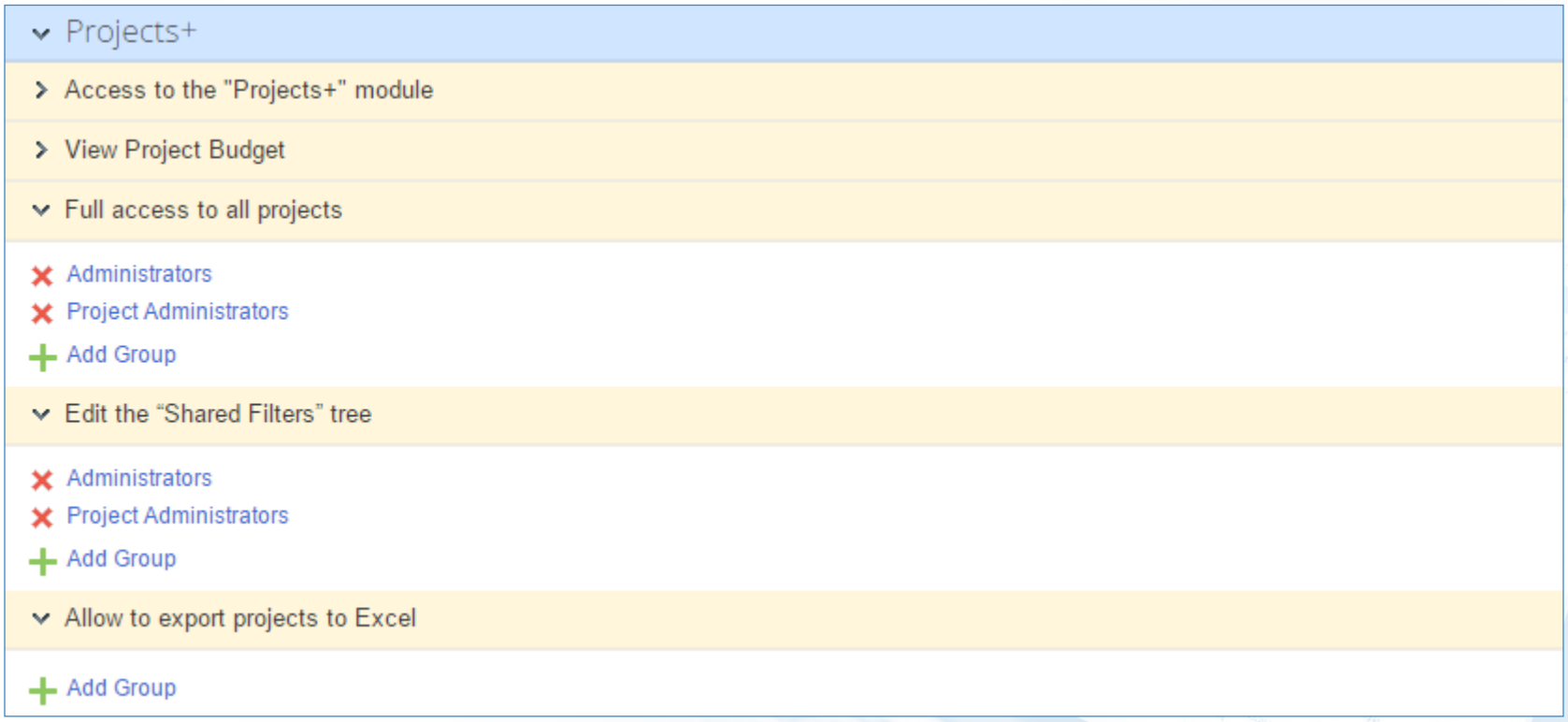
Starting a Process from a Project Page

In ELMA Projects+, the standard process procedures are executed as business processes. The processes are started when needed, for example, when you have to buy additional materials or request additional hours. You can start these processes directly from the project page. Also, they can be started when a project stage is updated, or when a corresponding task is assigned.







Limited Access to Business Information

ELMA Projects+ has flexible access permissions settings for information resources. You can give access to the general project information, documents and project budget only to those employees who need this information for their work.