



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 describes 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.

1

KPI Name

2

KPI Type

3

Calculation Rule

4

Step 4 Show

Plan Value (In Minutes):

Scale

Stabilization

Plan

0	-50% from plan	-10% from plan	+10% from plan	+50% from plan	+100% from plan
0%		100%			0%

Back

Complete

Cancel

> Process Information

> Show by swimlanes and executors

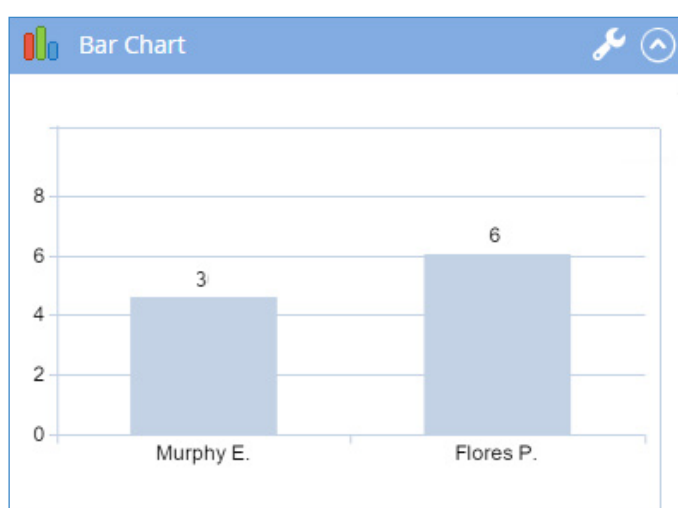
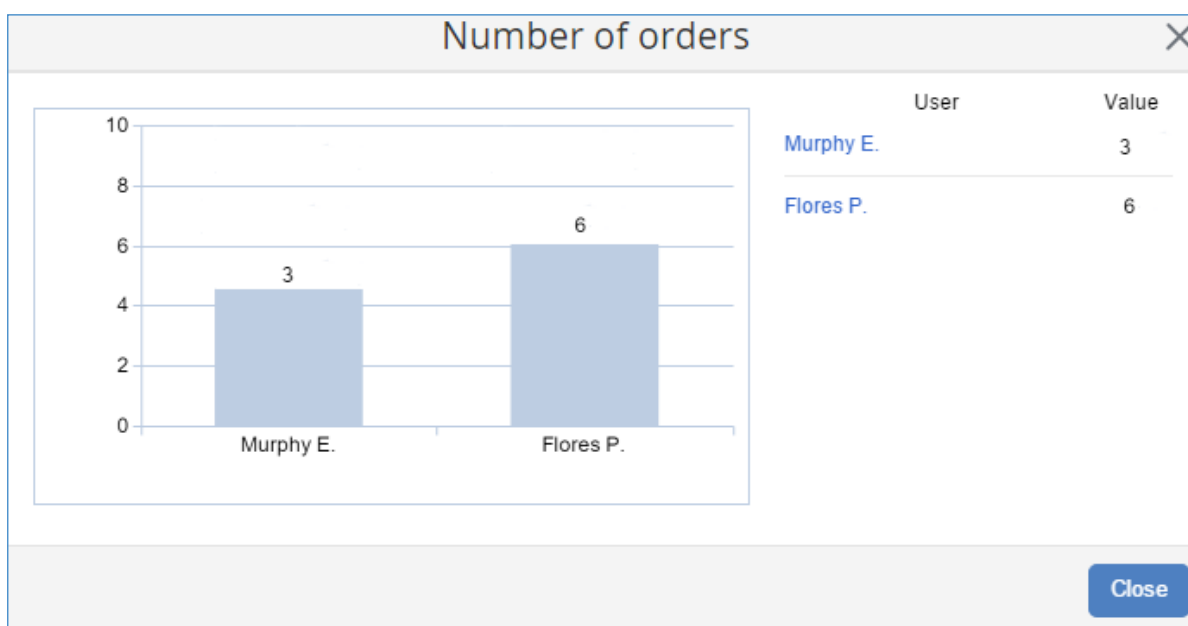
> Show by statuses

> Metrics and KPIs

KPI/User	Plan	Fact	Status
<div> <div>Number of orders ( January 2016 )</div> <div>Diagram</div> </div>			
Murphy E.		6	
Flores P.		3	
<div> <div>Invoice</div> <div>Diagram</div> </div>			
Murphy E.		3500	
Flores P.		3500	












Processes 15
Tasks 6

Quantity: 15
Items found: 15



Processes 10 Tasks 3

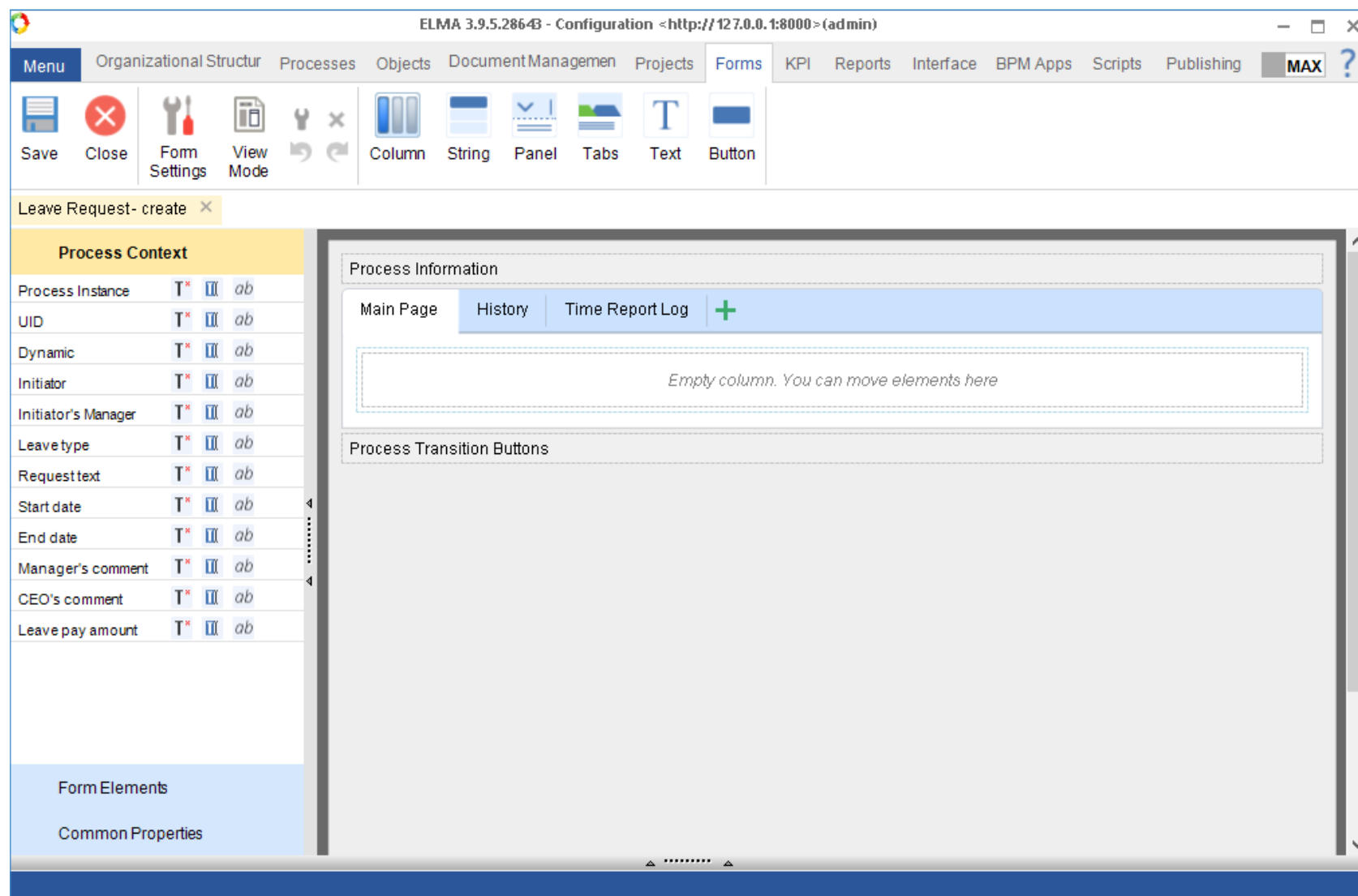
Quantity 15 Items found: 10 Pages: 1

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.



ELMA 3.9.5.2864B - Configuration <http://127.0.0.1:8000> (admin)

Menu Organizational Structur Processes Objects DocumentManagemen Projects **Forms** KPI Reports Interface BPM Apps Scripts Publishing MAX ?

Save Close Form Settings View Mode Column String Panel Tabs Text Button

Leave Request- create x

**Process Context**

Process Instance	T*	UI	ab
UID	T*	UI	ab
Dynamic	T*	UI	ab
Initiator	T*	UI	ab
Initiator's Manager	T*	UI	ab
Leave type	T*	UI	ab
Request text	T*	UI	ab
Start date	T*	UI	ab
End date	T*	UI	ab
Manager's comment	T*	UI	ab
CEO's comment	T*	UI	ab
Leave pay amount	T*	UI	ab

**Form Elements**

**Common Properties**

**Process Information**

Main Page History Time Report Log +

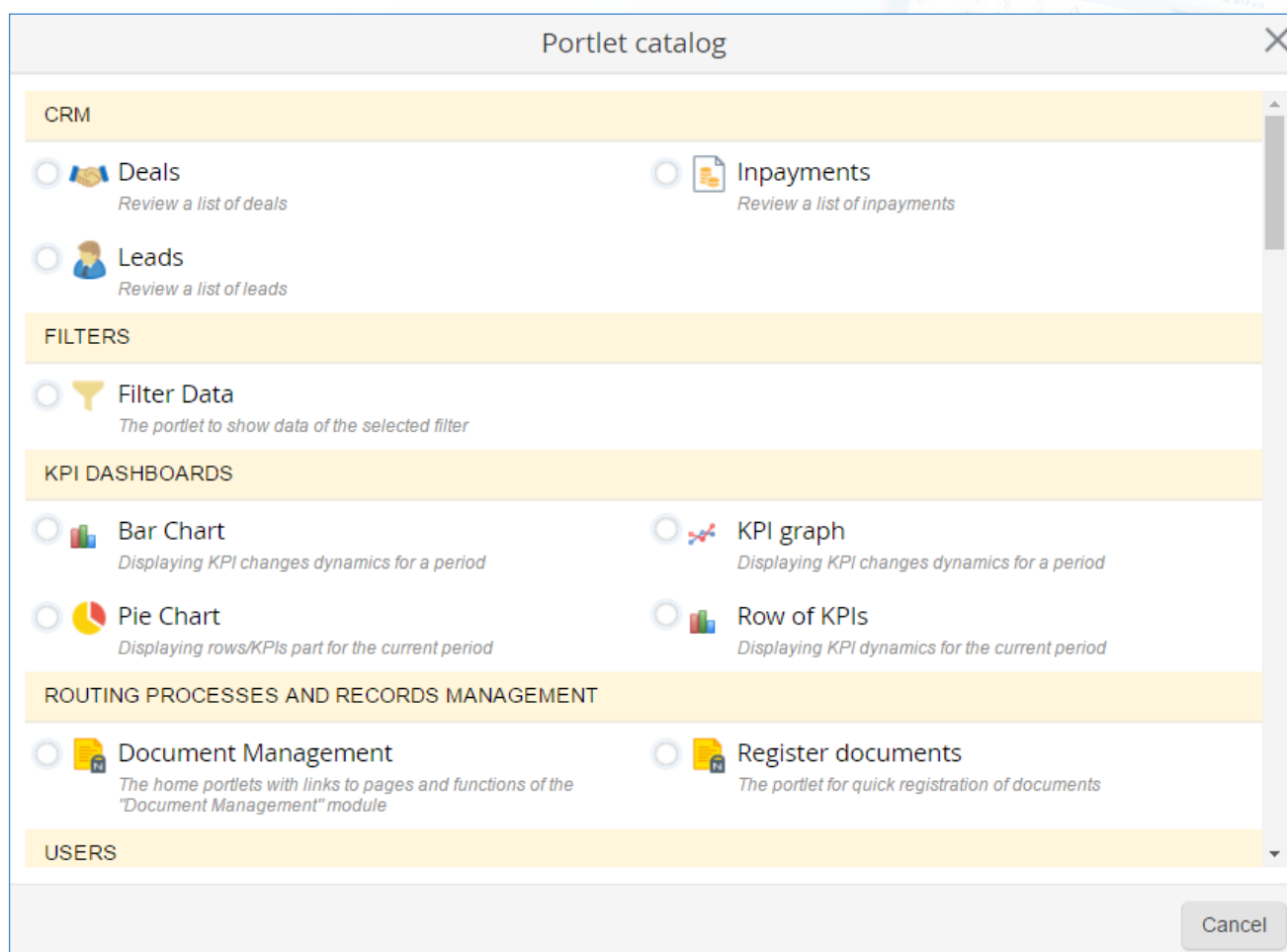
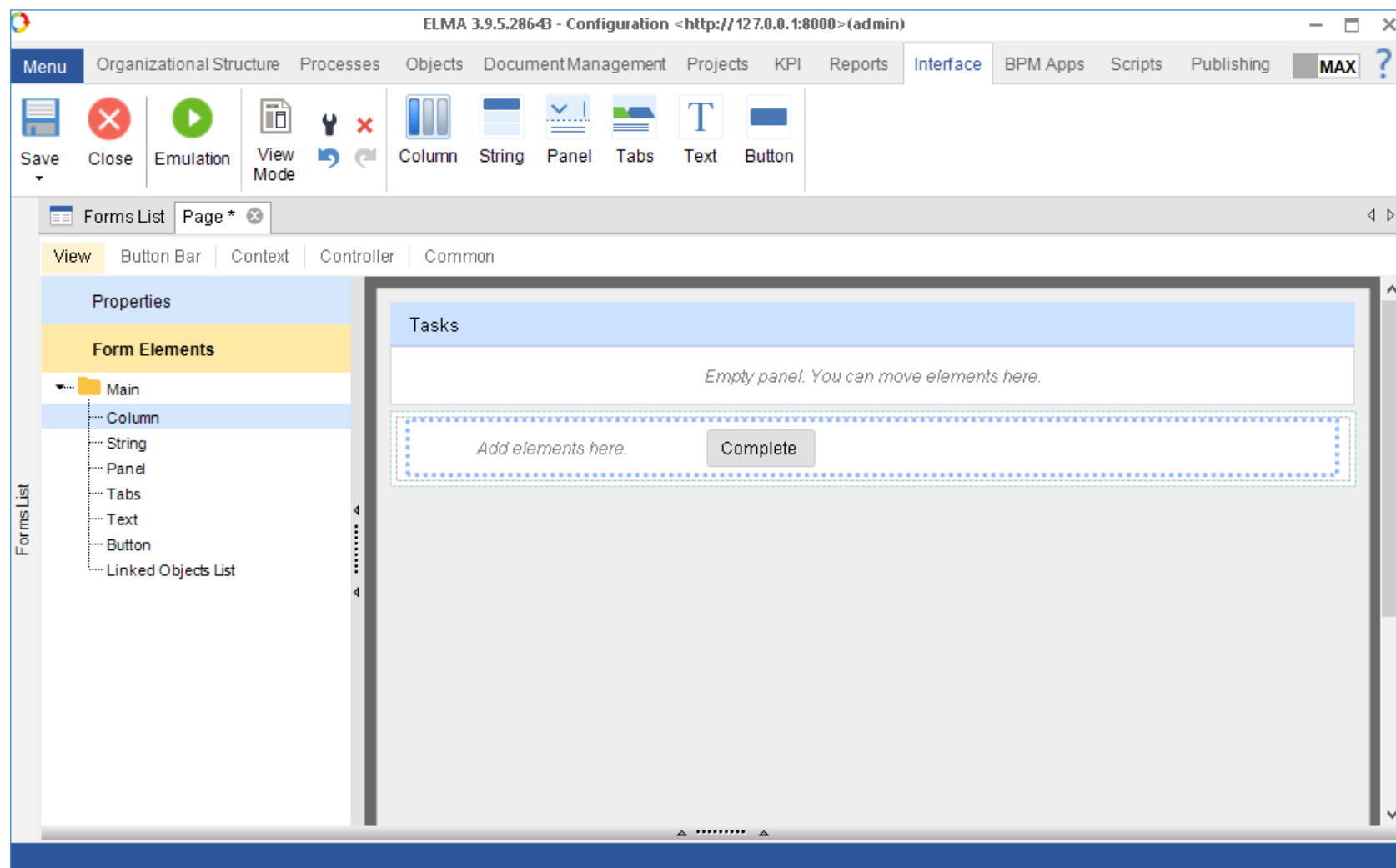
Empty column. You can move elements here

**Process Transition Buttons**

# Modeling New Interfaces in ELMA Designer

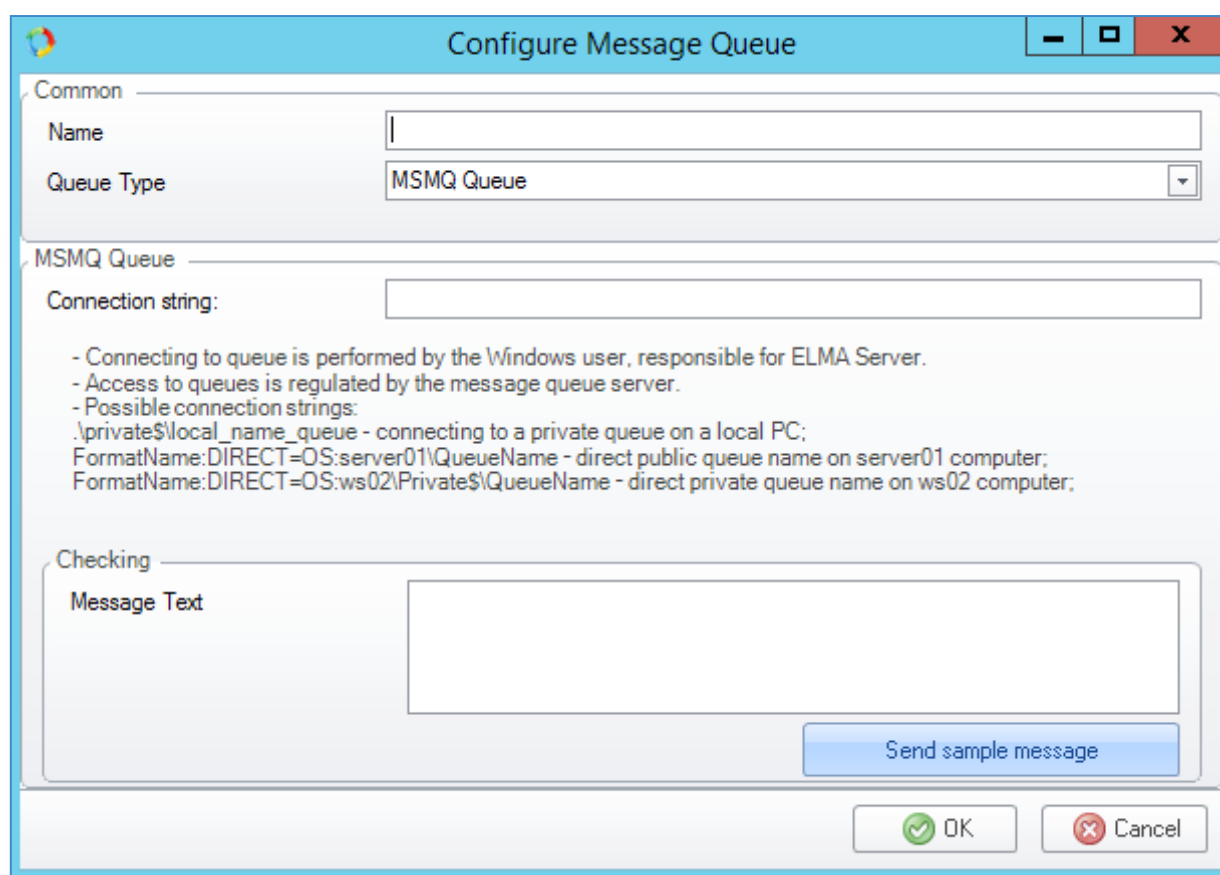
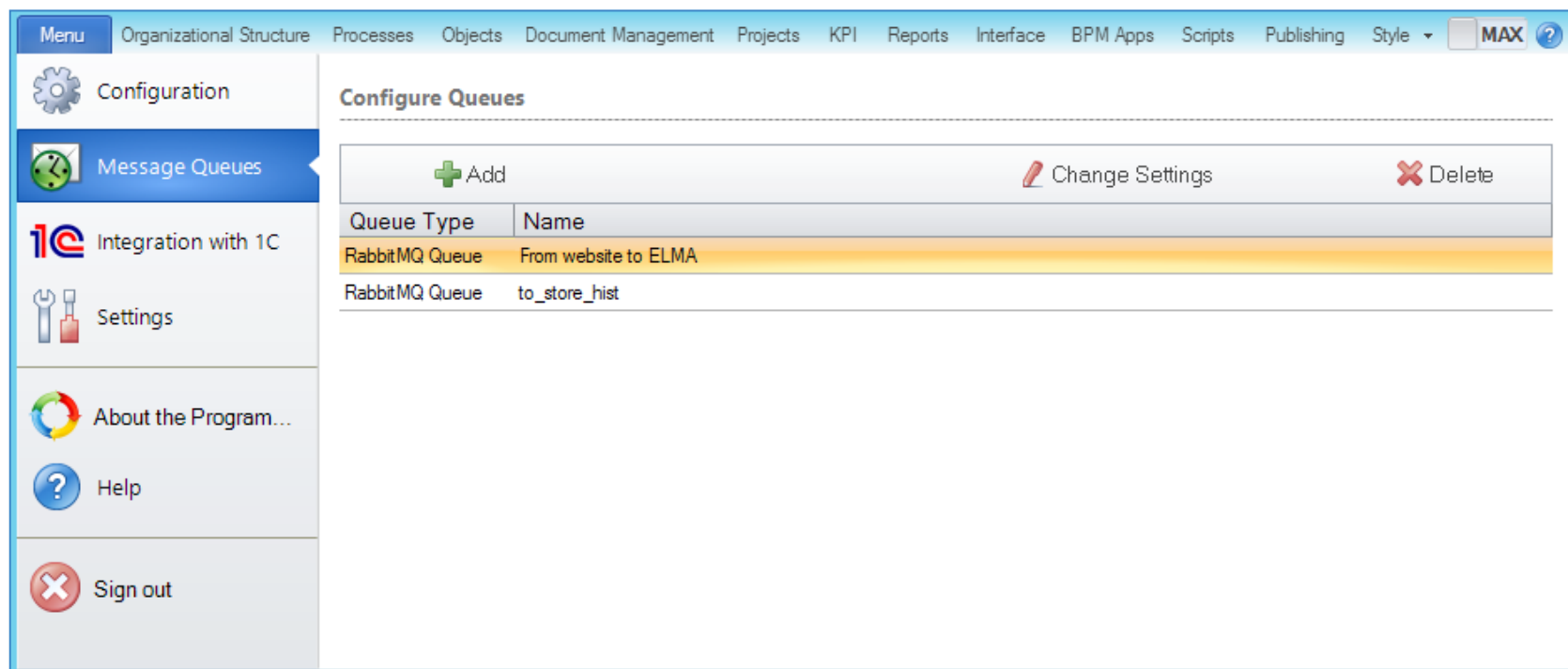
In ELMA Designer, you can create and modify user interfaces according to specific requirements. You can create portlets and pages in the standard form maker or use Razor markup.

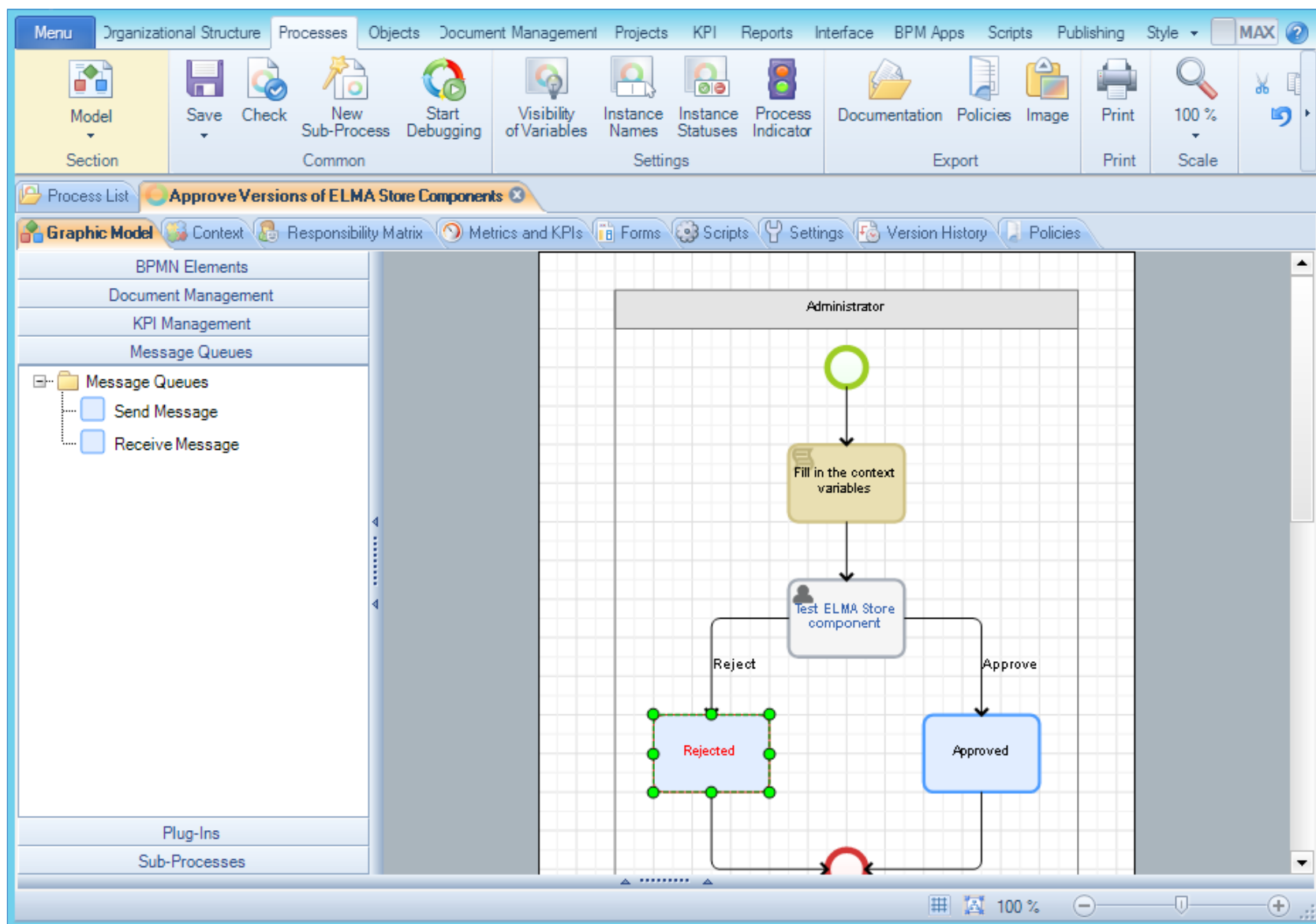
The new portlets and pages become available to the users right after being published.



# 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.

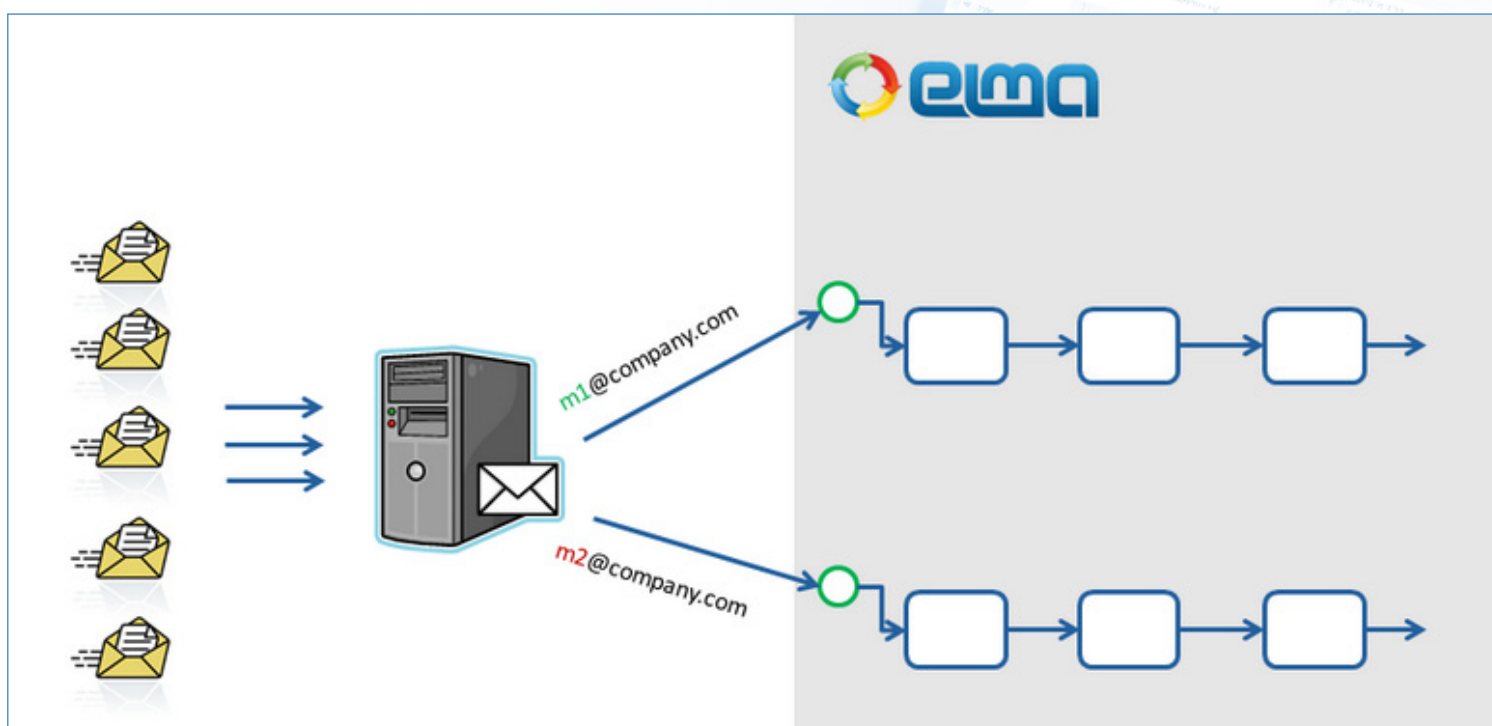




## Additional Tools for Fast Integration

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.


Start Debugging



DEBUGGING

Debugging of the process 'Provision of Services'

Process Instance
[Debugging] Provision of Services (2/1/2016 11:47:17 AM)

Initial Debugging Element
Fill in the request form

Context

Templates:

Initiator

Executor

Contractor

Service type

Description


Additional information


Active Debugging Instances

Start Debugging


# 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.


Start Script


Reset Context

## Script Emulation - Exchange Data with Website


The script is executed


Debugging Parameters


Script \*

Send

Recovery

☒ Yes
☐ No

If this parameter is enabled, all changes made by the script will be canceled when the script is executed


Context

Initiator

Baldwin Ed (Chief Marketing Officer, Head of Marketing)

Hide user form
☐

Data to send

+ Add

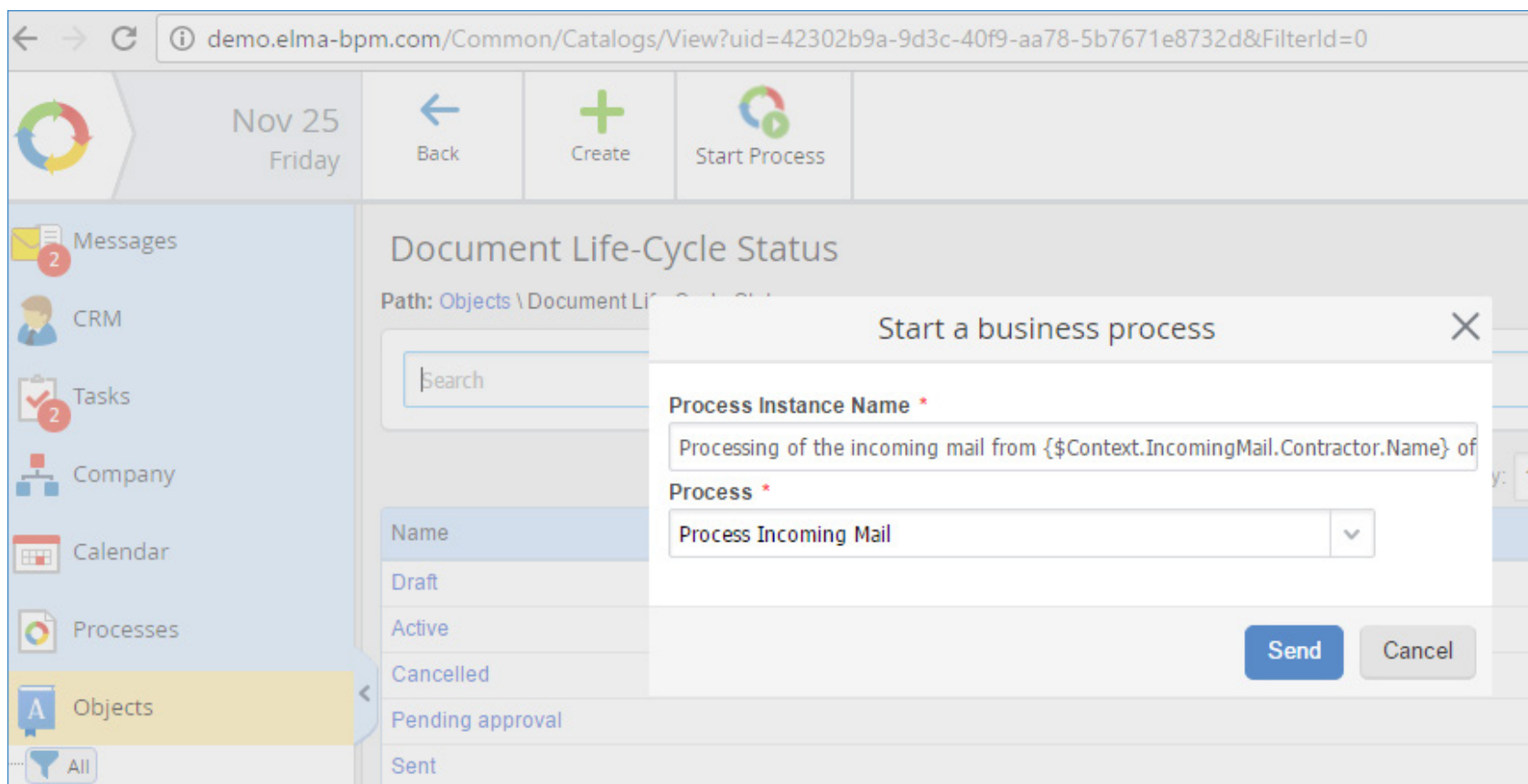
To group by the column, move its title here

Workflow instance	Workflow instance status	Manager's note
No data to display		



## 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.






















Becker N.





### Business Calendar Settings

← November 2016 →

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
8:00 AM							
9:00 AM		9:00 AM	9:00 AM	9:00 AM	9:00 AM	9:00 AM	
10:00 AM							
11:00 AM							
12:00 PM		12:00 PM	12:00 PM	12:00 PM	12:00 PM	12:00 PM	
1:00 PM		1:00 PM	1:00 PM	1:00 PM	1:00 PM	1:00 PM	
2:00 PM							
3:00 PM							
4:00 PM							
5:00 PM		6:00 PM	6:00 PM	6:00 PM	6:00 PM	6:00 PM	
6:00 PM							


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

Day	Status
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 09:00:00 to 17:00:00, 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

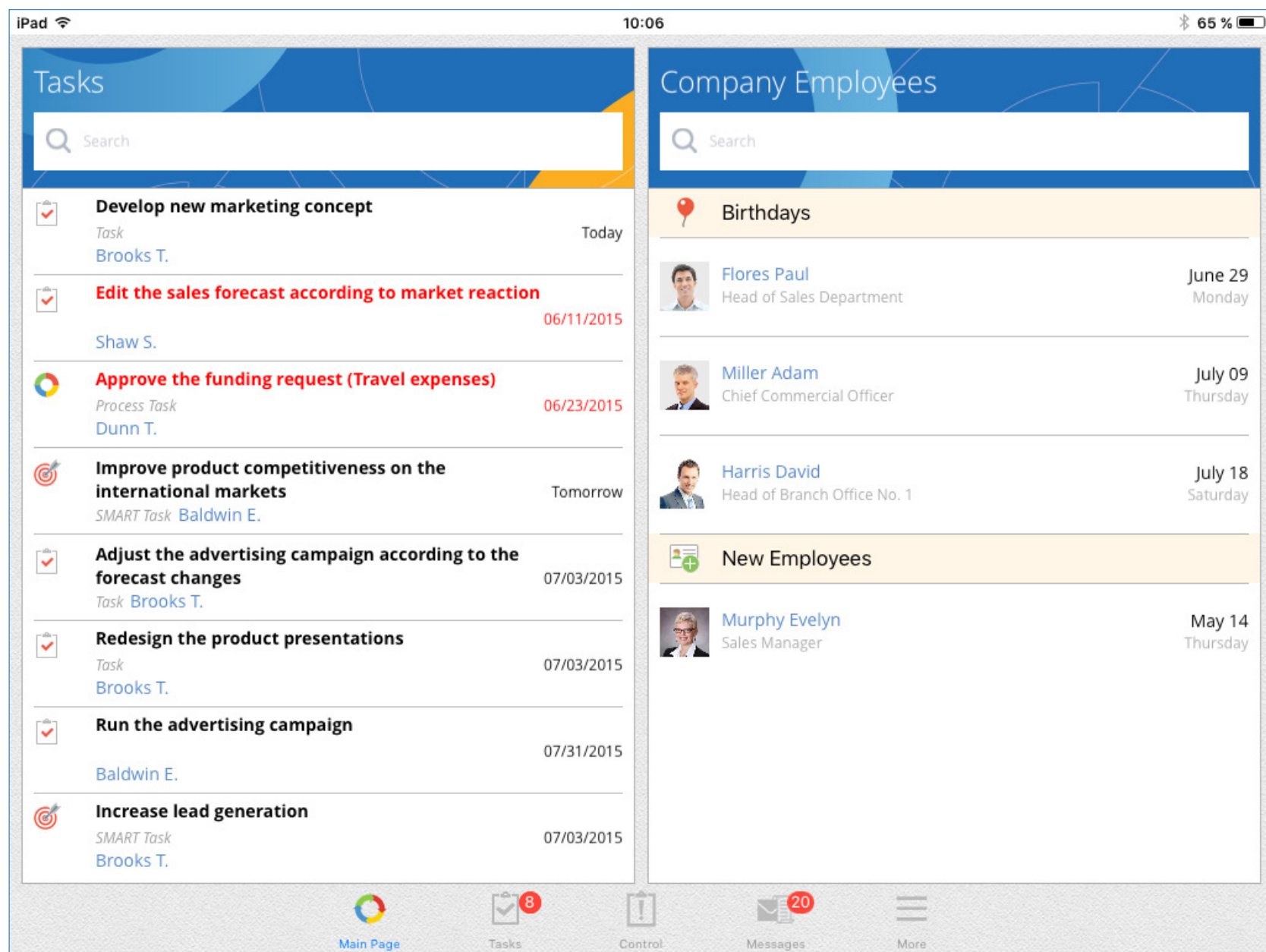
# Mobile Applications

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.



**Tasks**




Search

- ☒ **Develop new marketing concept**  
Task Brooks T. Today
- ☒ **Edit the sales forecast according to market reaction**  
Shaw S. 06/11/2015
- ☒ **Approve the funding request (Travel expenses)**  
Process Task Dunn T. 06/23/2015
- ☒ **Improve product competitiveness on the international markets**  
SMART Task Baldwin E. Tomorrow
- ☒ **Adjust the advertising campaign according to the forecast changes**  
Task Brooks T. 07/03/2015
- ☒ **Redesign the product presentations**  
Task Brooks T. 07/03/2015
- ☒ **Run the advertising campaign**  
Baldwin E. 07/31/2015
- ☒ **Increase lead generation**  
SMART Task Brooks T. 07/03/2015


**Company Employees**

Search

**Birthdays**

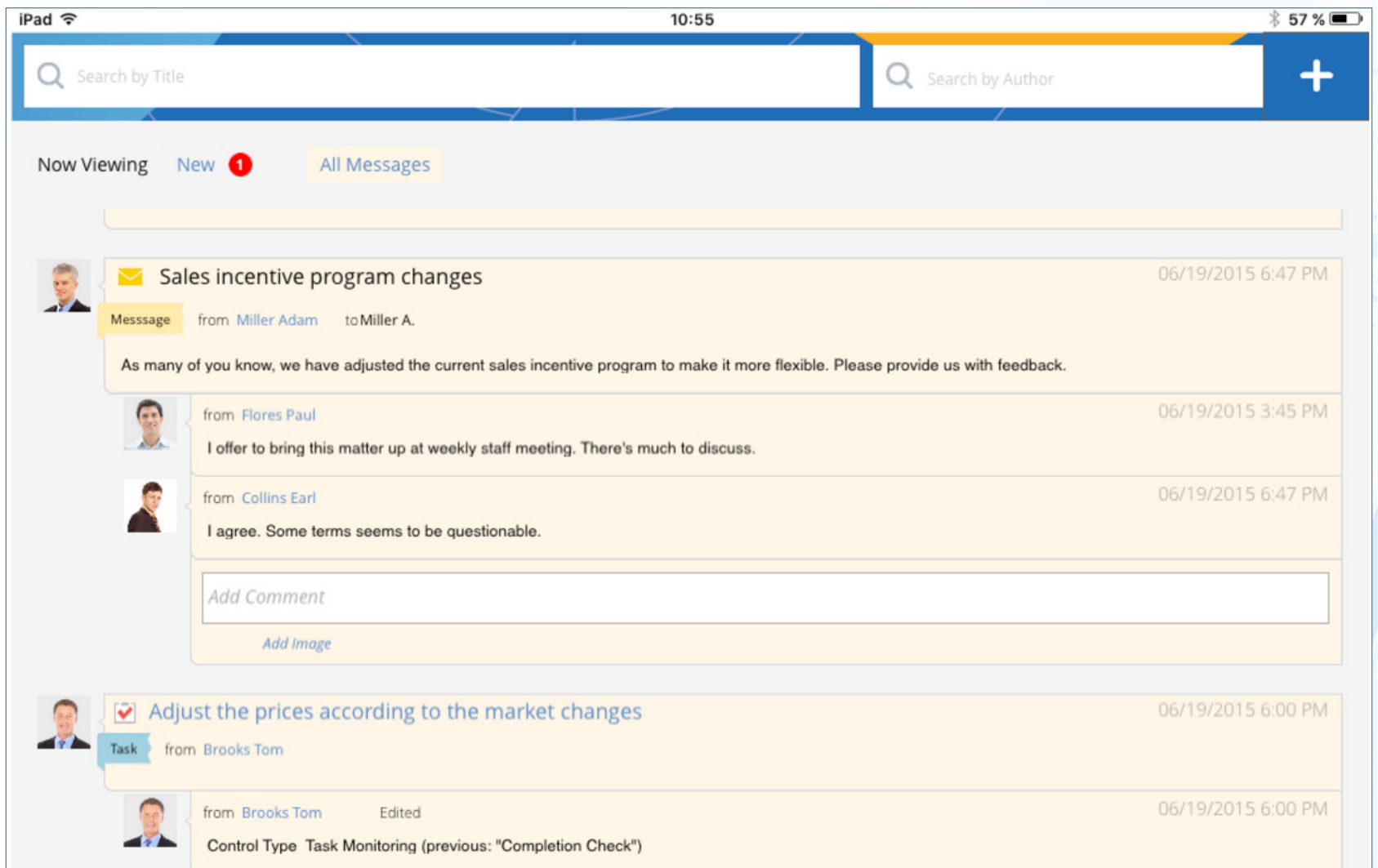
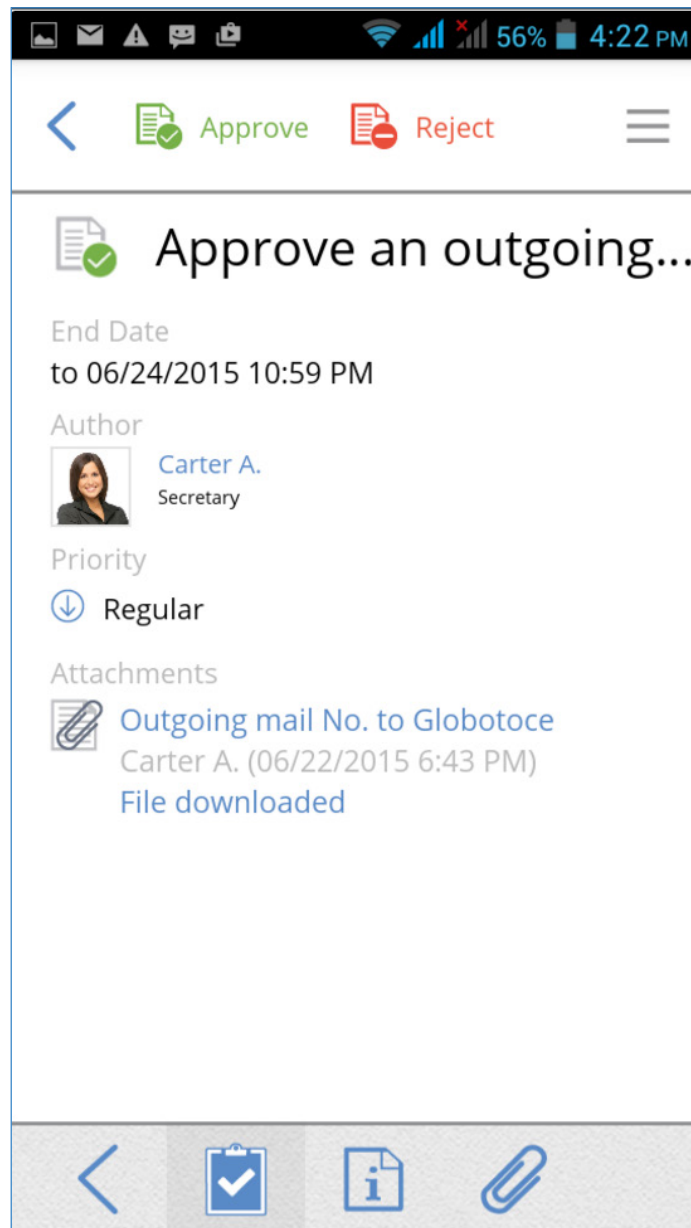
-  **Flores Paul**  
Head of Sales Department June 29 Monday
-  **Miller Adam**  
Chief Commercial Officer July 09 Thursday
-  **Harris David**  
Head of Branch Office No. 1 July 18 Saturday

**New Employees**

-  **Murphy Evelyn**  
Sales Manager May 14 Thursday

**Navigation Bar:**

- Main Page
- Tasks (8)
- Control
- Messages (20)
- More






# 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.



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)

## Import fromLDAP

Start your work with finding users in LDAP

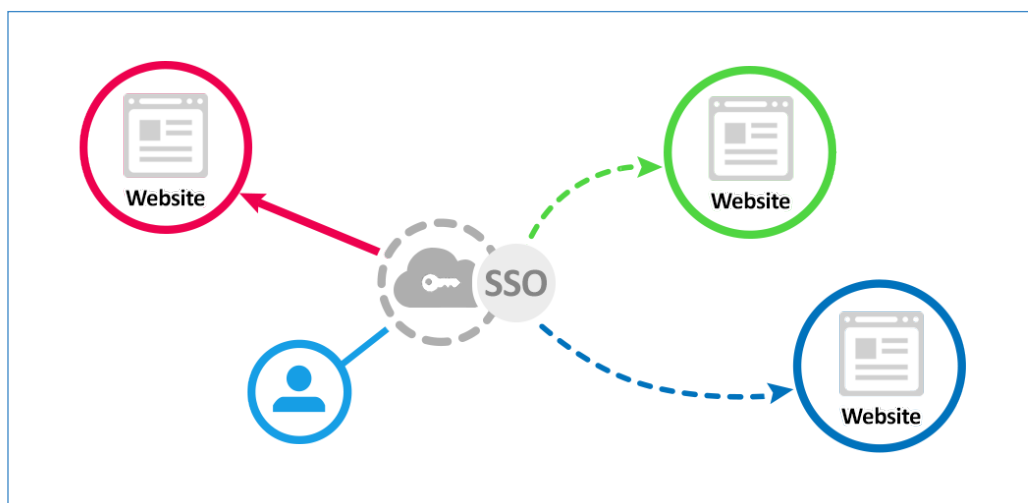
> The groups to which the selected users will be imported

<input type="checkbox"/> Login	Full Name
<input checked="" type="checkbox"/> keller	Keller Carl
<input type="checkbox"/> nelson	Nelson James
<input type="checkbox"/> brooks	Brooks Tom
<input type="checkbox"/> rodriguez	Rodriguez Anne
<input checked="" type="checkbox"/> bailey	Bailey Frank
<input checked="" type="checkbox"/> collins	Collins Earl
<input type="checkbox"/> taylor	Taylor Erica
<input checked="" type="checkbox"/> flores	Flores Paul



## Single Sign-On

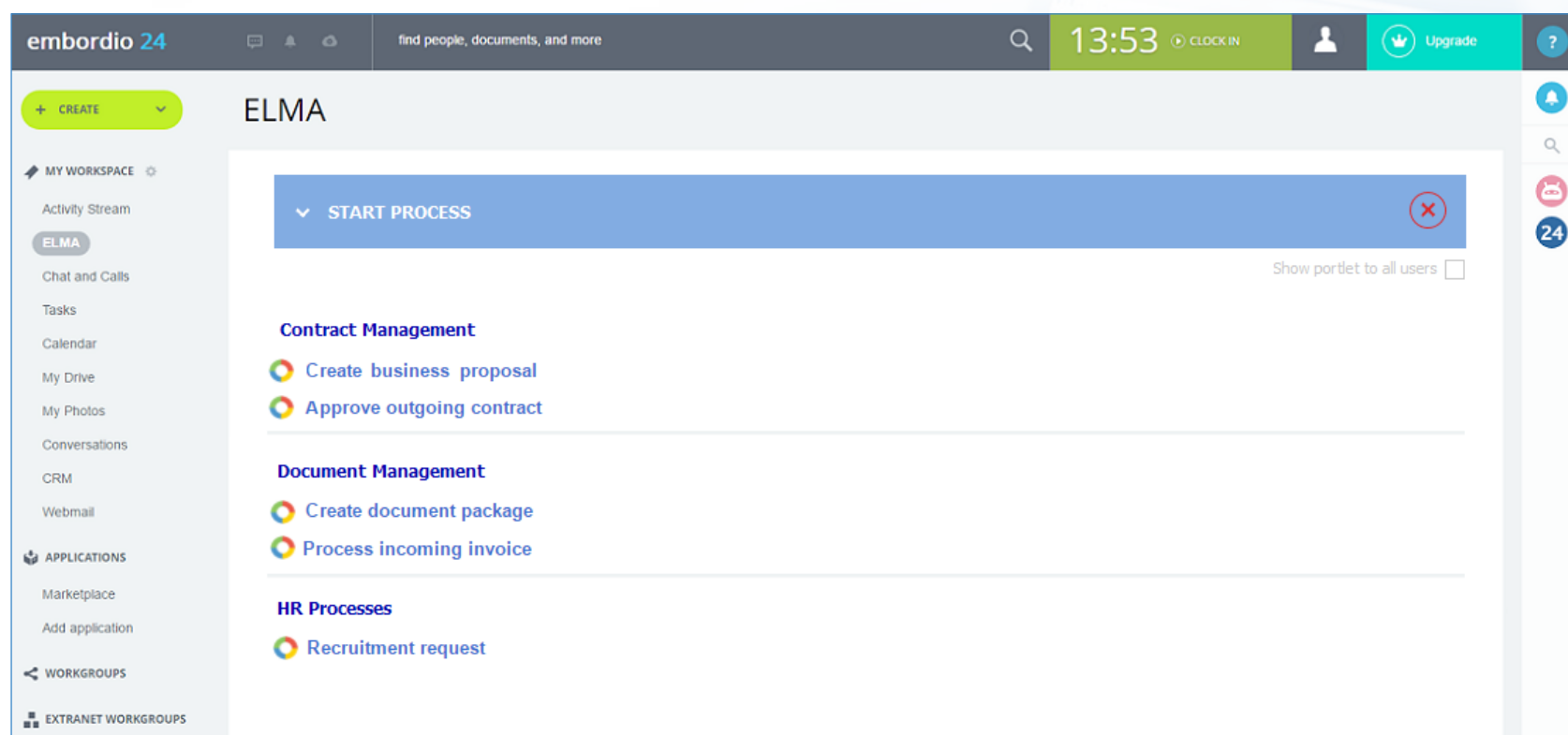
If your employees are using various corporate programs, it is very convenient to use single sign-on. With single sign-on, a user logs into all the corporate systems at once after being authenticated in the corporate domain.



## 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

Save Check Out Paste Edit Clipboard

Body 13px

B I U abc x<sub>2</sub> x<sup>2</sup> Paragraph

AaBbCcDdE Paragraph AaBb Heading 1 Styles

Text Layout Edit Source Select Convert to XHTML Markup

Documents Recent Calendar ELMA for SharePoint Site Contents Recycle Bin EDIT LINKS

### ELMA Tasks

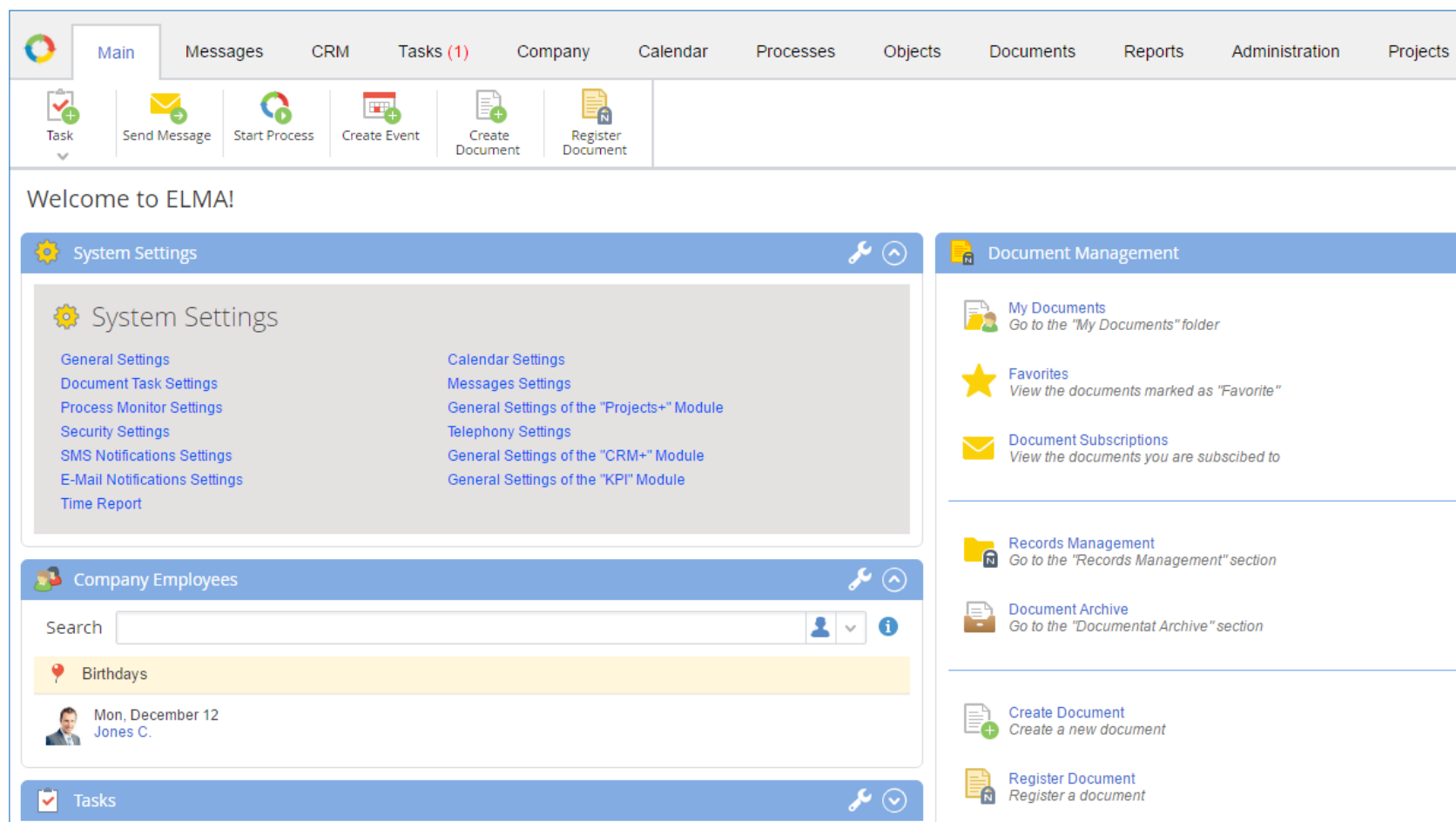
Type	Task	Instance	Process	End Date
Outgoing mail No.00004 to Key Solutions	Outgoing mail No.00004 to Key Solutions			6/24/2015
Author: Murphy E.				
Approve the business proposal	Business proposal for Blocket			6/20/2015
The "Approval of business proposal for Blocket" instance (Murphy E.) in the "Approve Business Proposal" process				7:13 AM
Create the business proposal	Order: Research equipment (Customer: Impact International)	Accept and Process Order		
Approve the business proposal	Business proposal for Centiro			6/16/2015
The "Approval of business proposal for Centiro" instance (Taylor E.) in the "Approve Business Proposal" process				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.



The screenshot displays the ELMA Lite Interface. At the top, there is a navigation bar with tabs: Main, Messages, CRM, Tasks (1), Company, Calendar, Processes, Objects, Documents, Reports, Administration, and Projects. Below the navigation bar is a row of icons for Task, Send Message, Start Process, Create Event, Create Document, and Register Document. The main content area is divided into three sections. The top section, titled 'Welcome to ELMA!', contains a 'System Settings' panel with links for General Settings, Document Task Settings, Process Monitor Settings, Security Settings, SMS Notifications Settings, E-Mail Notifications Settings, Time Report, Calendar Settings, Messages Settings, General Settings of the "Projects+" Module, Telephony Settings, General Settings of the "CRM+" Module, and General Settings of the "KPI" Module. The middle section, titled 'Company Employees', features a search bar and a list of employees, including 'Mon, December 12 Jones C.'. The bottom section, titled 'Tasks', shows a list of tasks. On the right side, there is a 'Document Management' panel with links for My Documents, Favorites, Document Subscriptions, Records Management, Document Archive, Create Document, and Register Document.

## Rich e-mail Interface

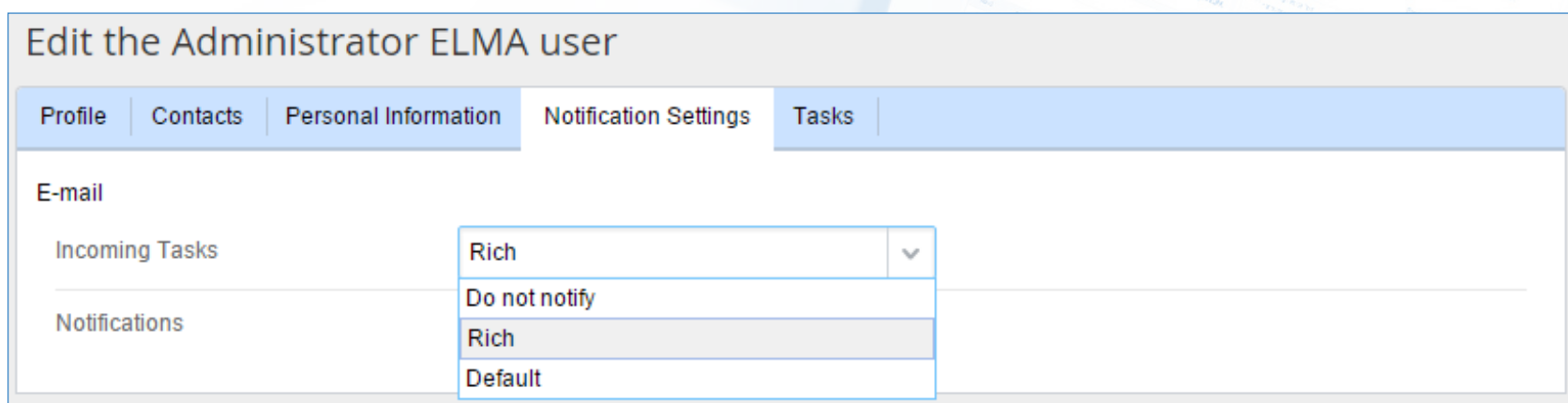
For those users who use e-mail services in their work, ELMA offers the ELMA Rich e-mail interface (ELMA.RE).

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.



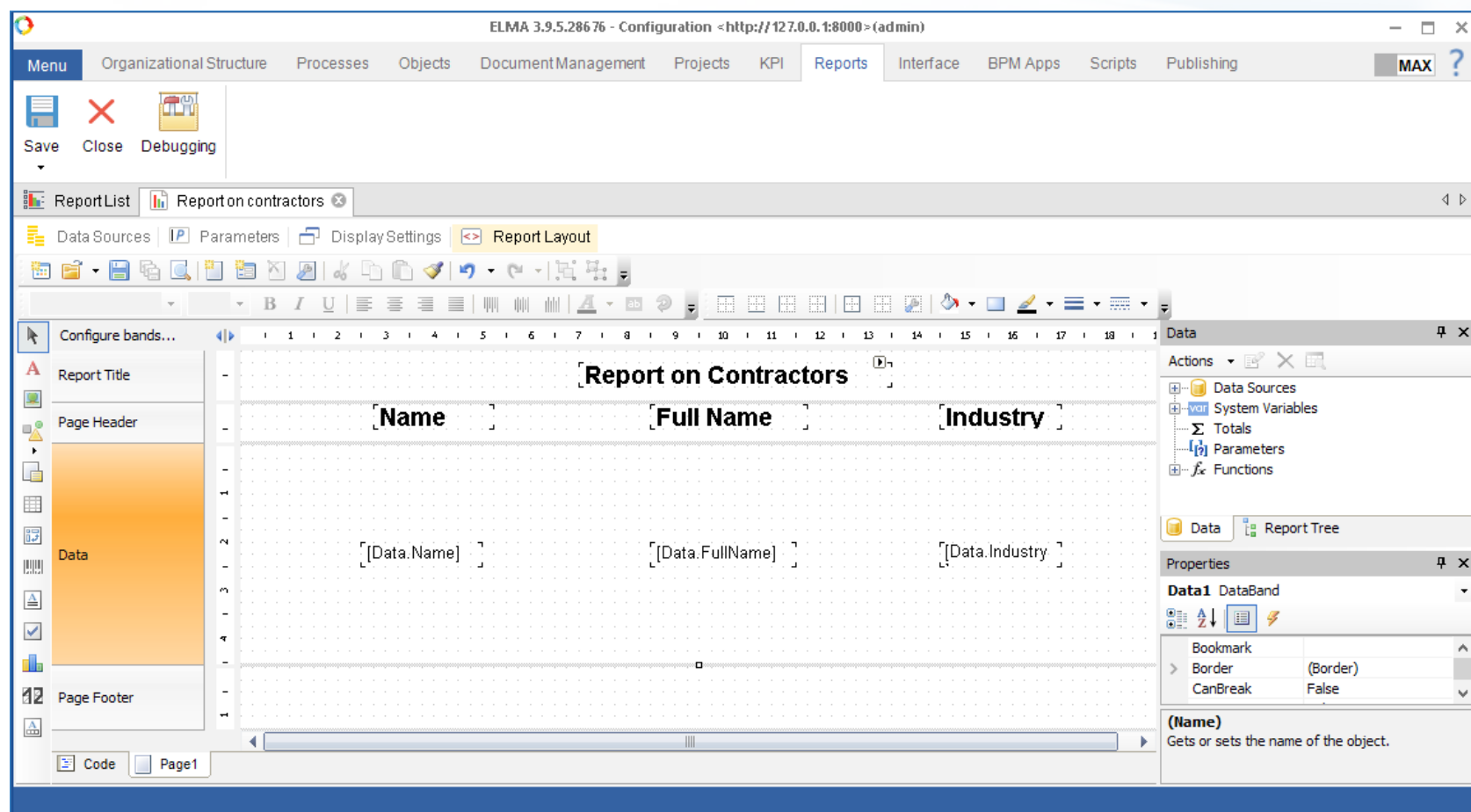
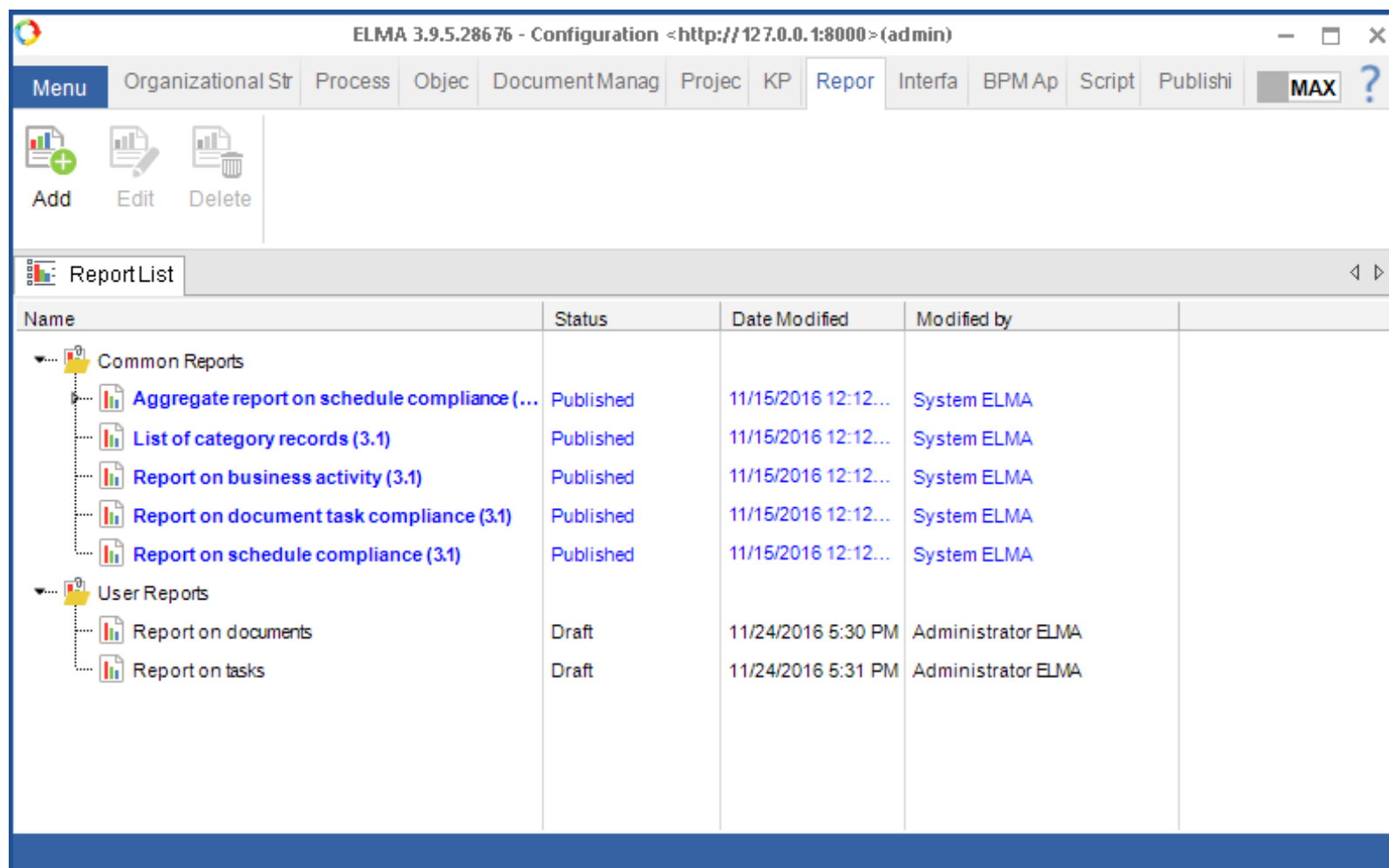
The screenshot shows the 'Edit the Administrator ELMA user' form. The form has tabs for Profile, Contacts, Personal Information, Notification Settings, and Tasks. The 'Notification Settings' tab is selected. Under the 'E-mail' section, there is a dropdown menu for 'Incoming Tasks' with options: Rich, Do not notify, Rich, and Default. The 'Rich' option is currently selected.





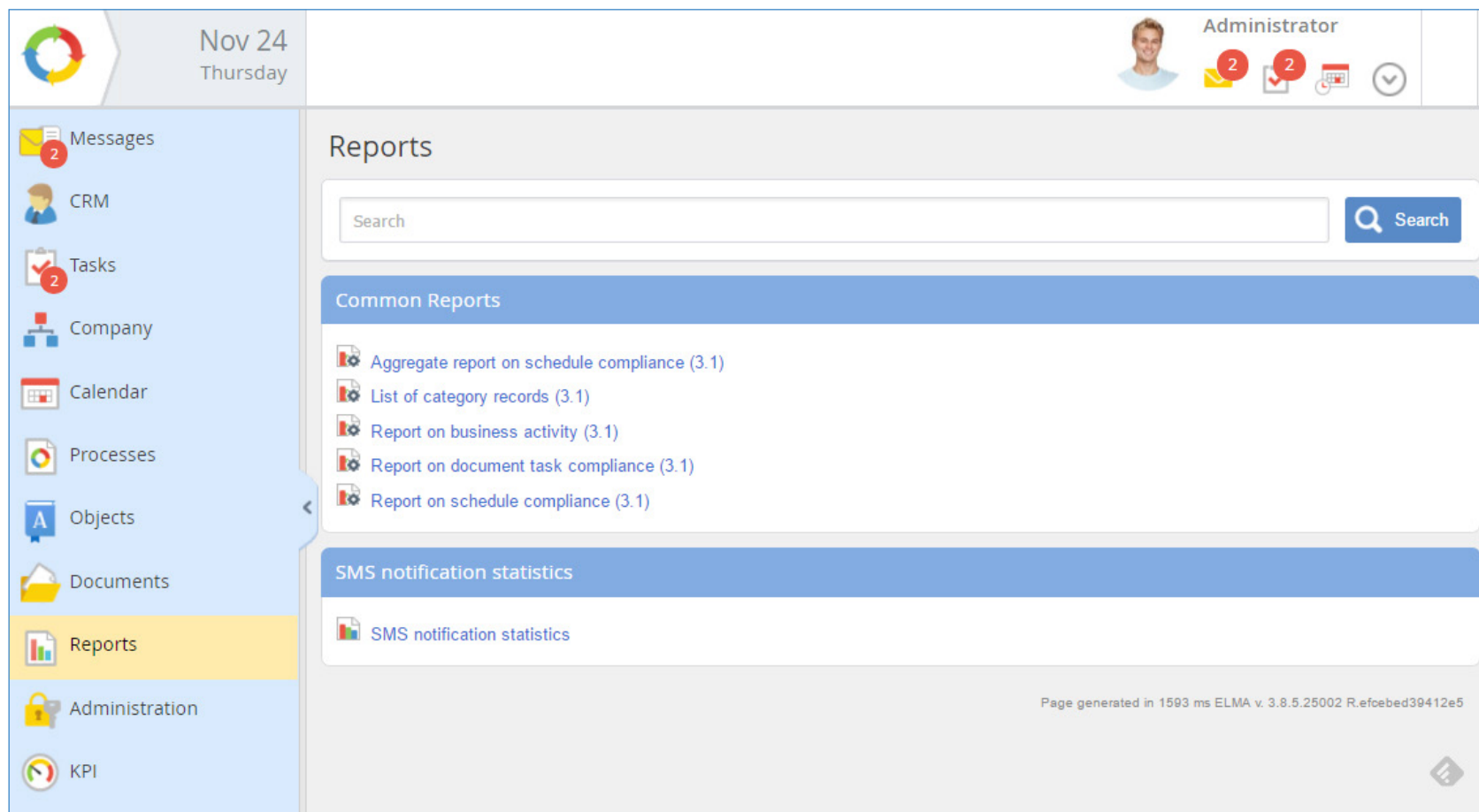
# Report Maker

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.



Nov 24 Thursday

Administrator

Messages

CRM

Tasks

Company

Calendar

Processes

Objects

Documents

Reports

Administration

KPI

## Reports

Search

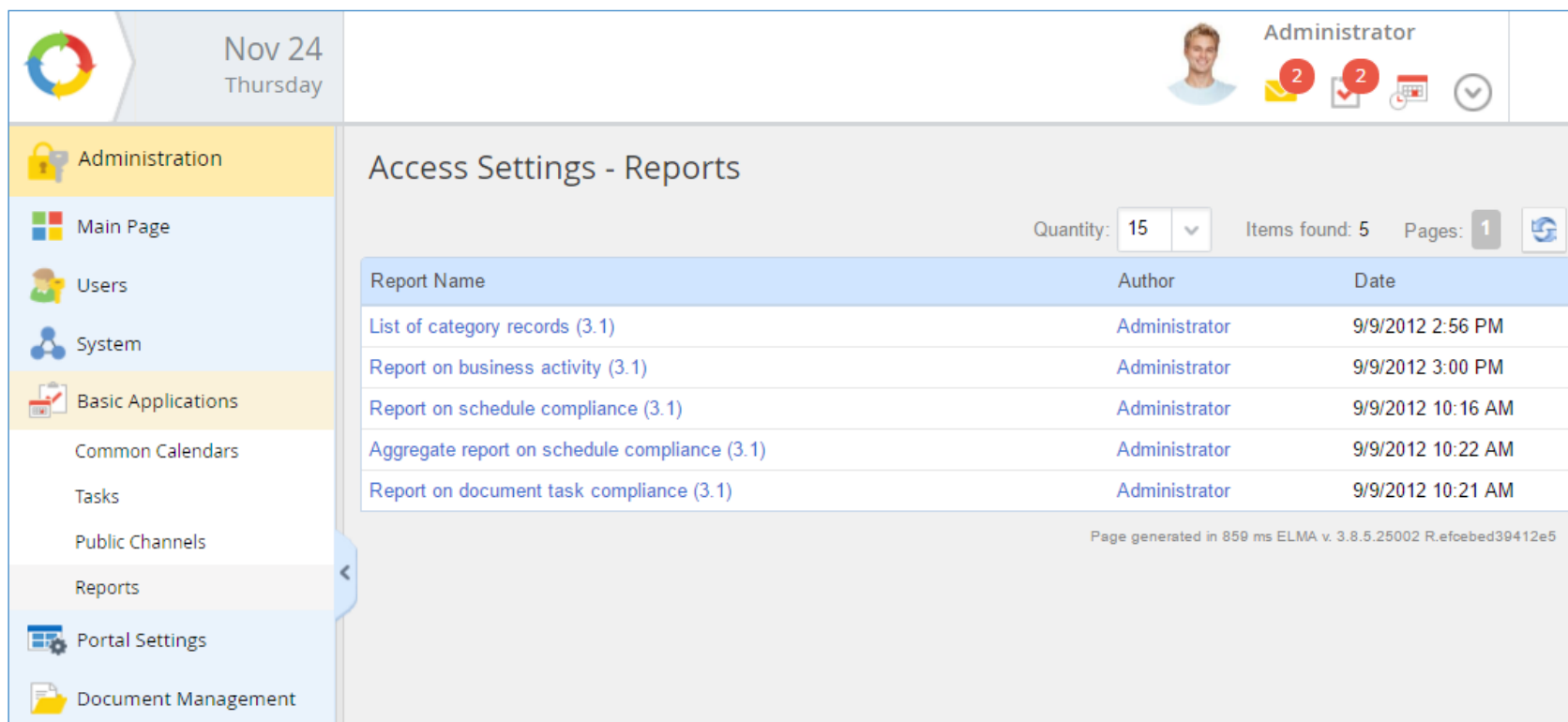
Common Reports

- Aggregate report on schedule compliance (3.1)
- List of category records (3.1)
- Report on business activity (3.1)
- Report on document task compliance (3.1)
- Report on schedule compliance (3.1)

SMS notification statistics

- SMS notification statistics

Page generated in 1593 ms ELMA v. 3.8.5.25002 R.efcebed39412e5



Nov 24 Thursday

Administrator

Administration

Main Page

Users

System

Basic Applications

Common Calendars

Tasks

Public Channels

Reports

Portal Settings

Document Management

## Access Settings - Reports

Quantity: 15 Items found: 5 Pages: 1

Report Name	Author	Date
List of category records (3.1)	Administrator	9/9/2012 2:56 PM
Report on business activity (3.1)	Administrator	9/9/2012 3:00 PM
Report on schedule compliance (3.1)	Administrator	9/9/2012 10:16 AM
Aggregate report on schedule compliance (3.1)	Administrator	9/9/2012 10:22 AM
Report on document task compliance (3.1)	Administrator	9/9/2012 10:21 AM

Page generated in 859 ms ELMA v. 3.8.5.25002 R.efcebed39412e5

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

Name	Time	Author	Description
<b>Saturday, November 05, 2016</b>			
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	
<b>Saturday, November 12, 2016</b>			
Sign a contract with the office equipment vendor	16:56	Baldwin Ed	
<b>Sunday, November 20, 2016</b>			
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:  | Items found: 7 | Pages: 1

Type	Subject	Start Date	End Date	Completion Date
	<b>Bailey F. (Chief of IT-Department, Head of Workshop No. 1)</b> 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
	<b>Baldwin E. (Chief Marketing Officer, Head of Marketing Department)</b> 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	-
	<b>Brooks T. (Chief Executive Officer)</b> 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&gt;

Quantity:  | Items found: 3 | Pages: 1

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

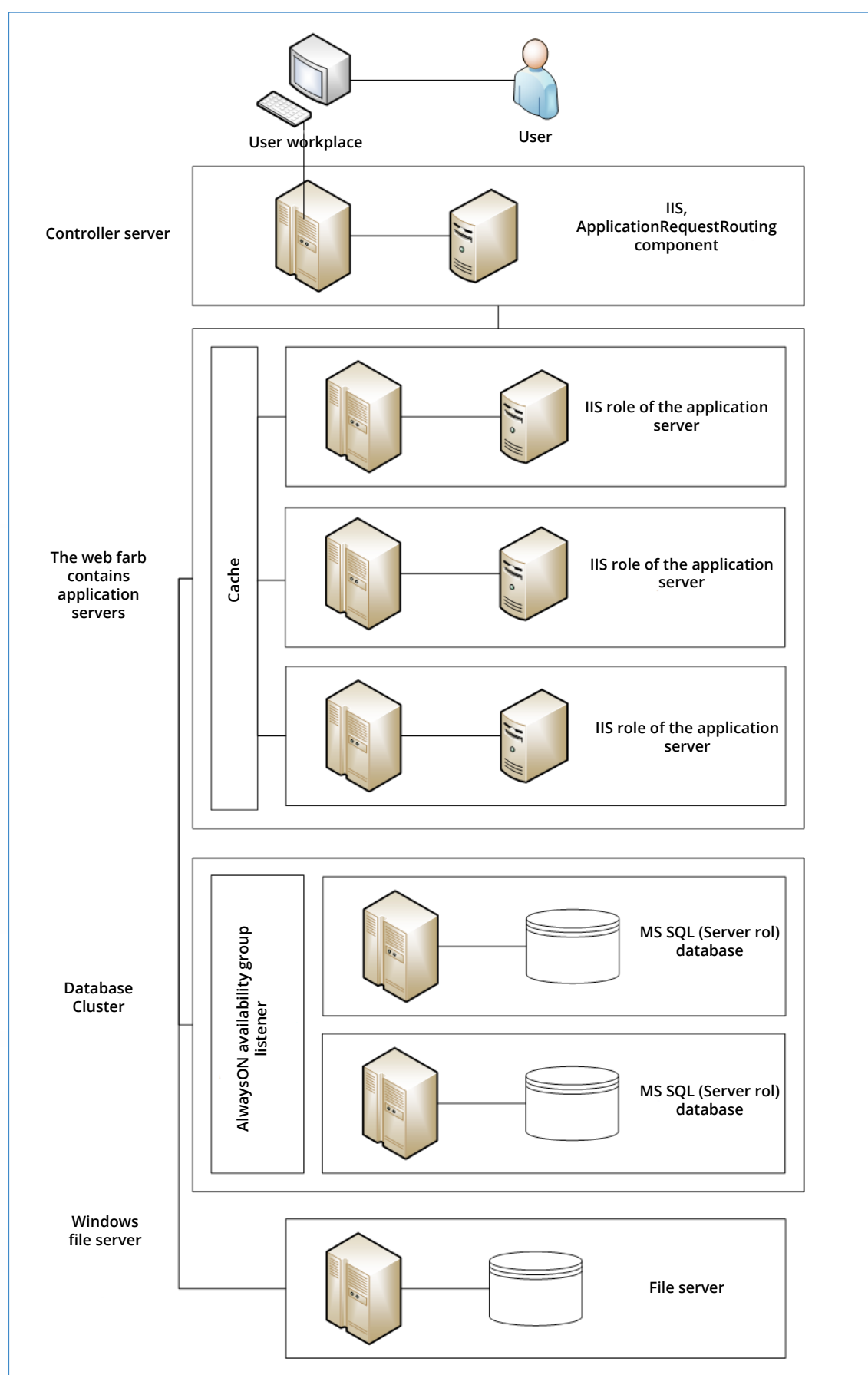
# Distributed Workload. Web Farm

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.

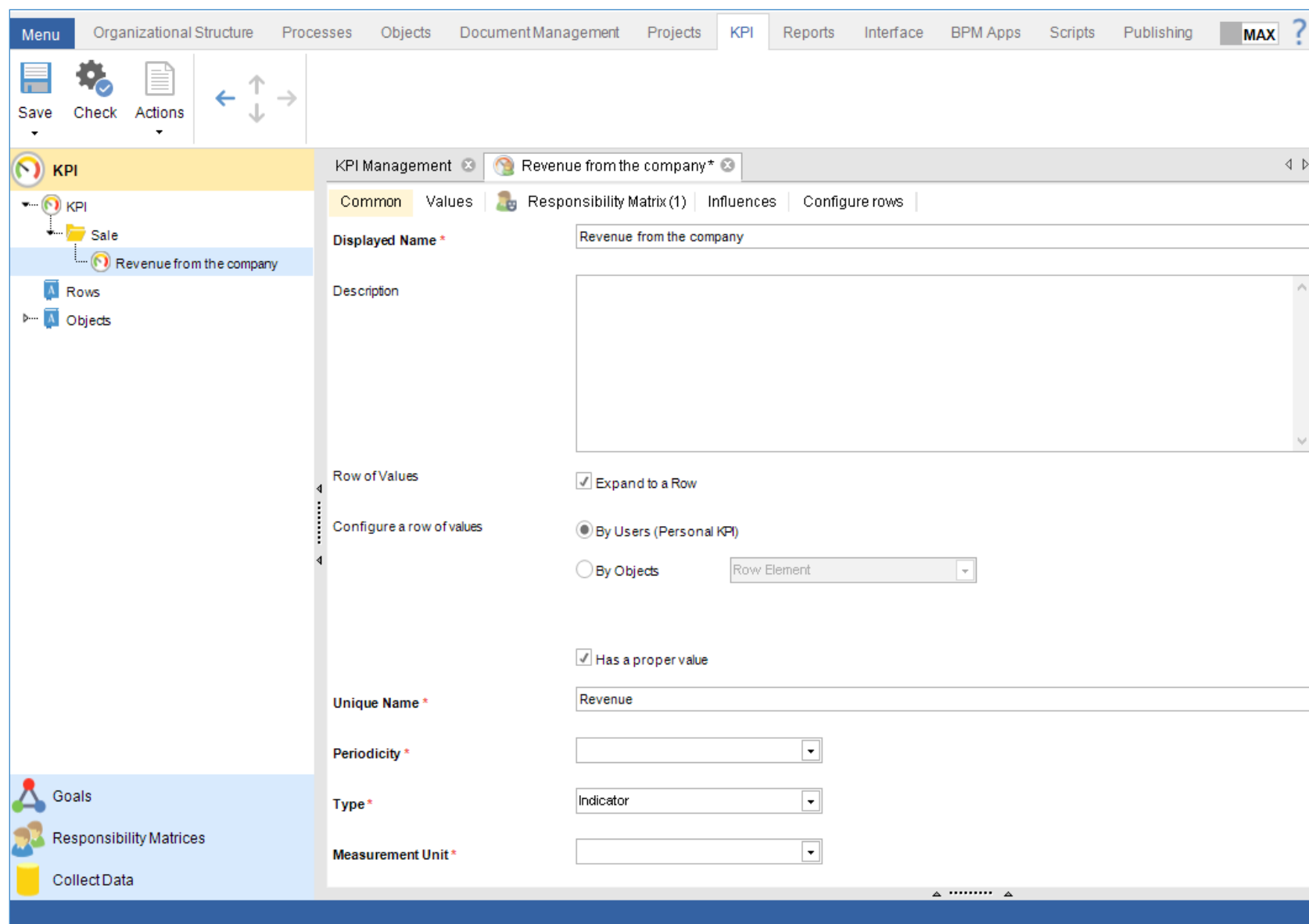


# CAPABILITIES OF ELMA KPI

## 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.

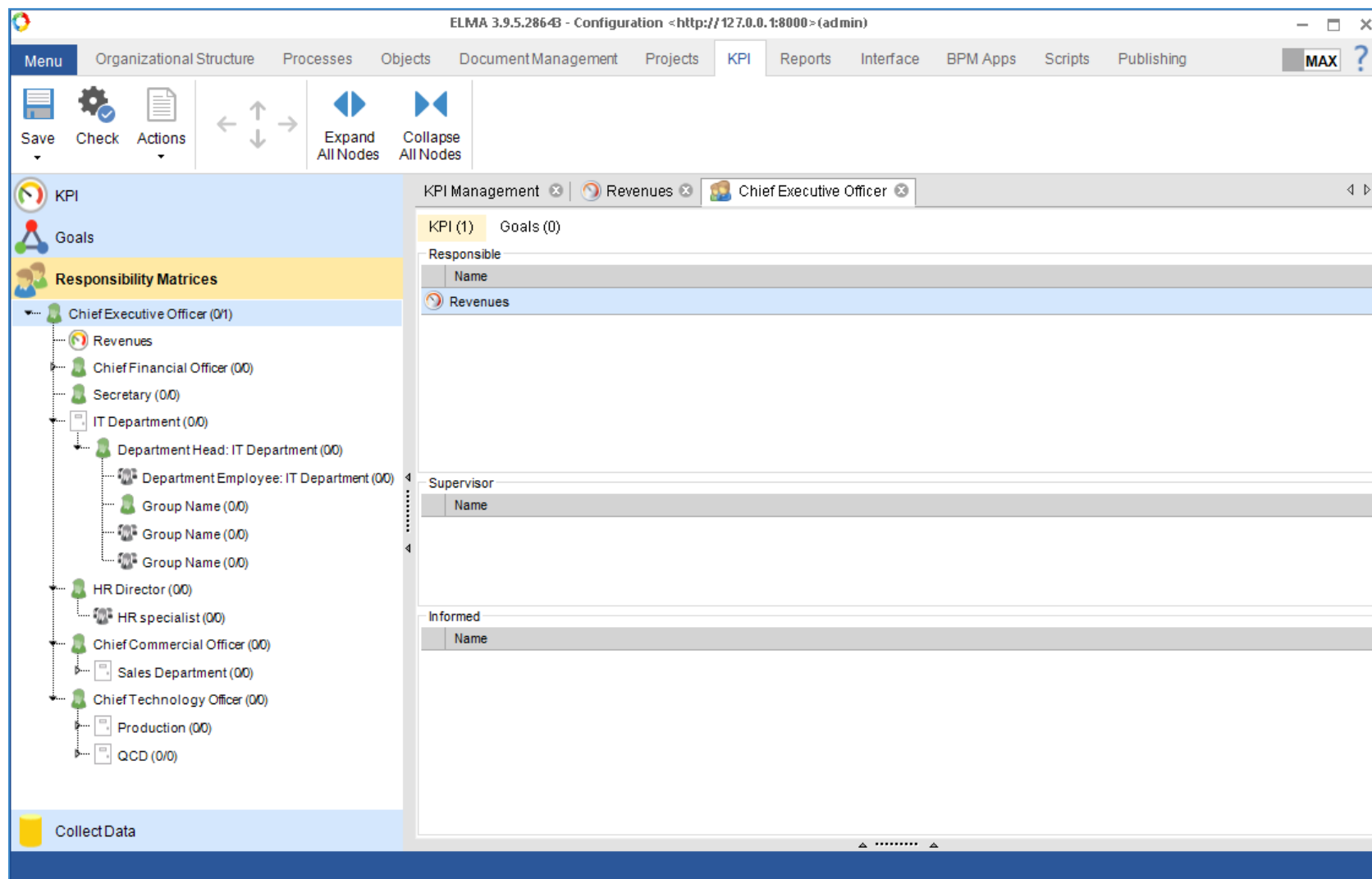


The screenshot shows the ELMA KPI configuration interface. The top menu bar includes: Menu, Organizational Structure, Processes, Objects, Document Management, Projects, KPI, Reports, Interface, BPM Apps, Scripts, Publishing, and a MAX button with a question mark. Below the menu is a toolbar with Save, Check, and Actions buttons, along with navigation arrows. The left sidebar shows a KPI tree structure: KPI (expanded) -> Sale -> Revenue from the company. Below this are links for Rows and Objects. At the bottom of the sidebar are links for Goals, Responsibility Matrices, and Collect Data. The main area is titled 'KPI Management' and shows the configuration for 'Revenue from the company'. It has tabs for Common, Values, Responsibility Matrix (1), Influences, and Configure rows. The 'Common' tab is active, showing fields for: Displayed Name (Revenue from the company), Description (empty text area), Row of Values (Expand to a Row checkbox checked), Configure a row of values (By Users (Personal KPI) radio button selected, By Objects radio button unselected, Row Element dropdown), Unique Name (Revenue), Periodicity (empty dropdown), Type (Indicator), and Measurement Unit (empty dropdown). A 'Has a proper value' checkbox is also checked.

# 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.

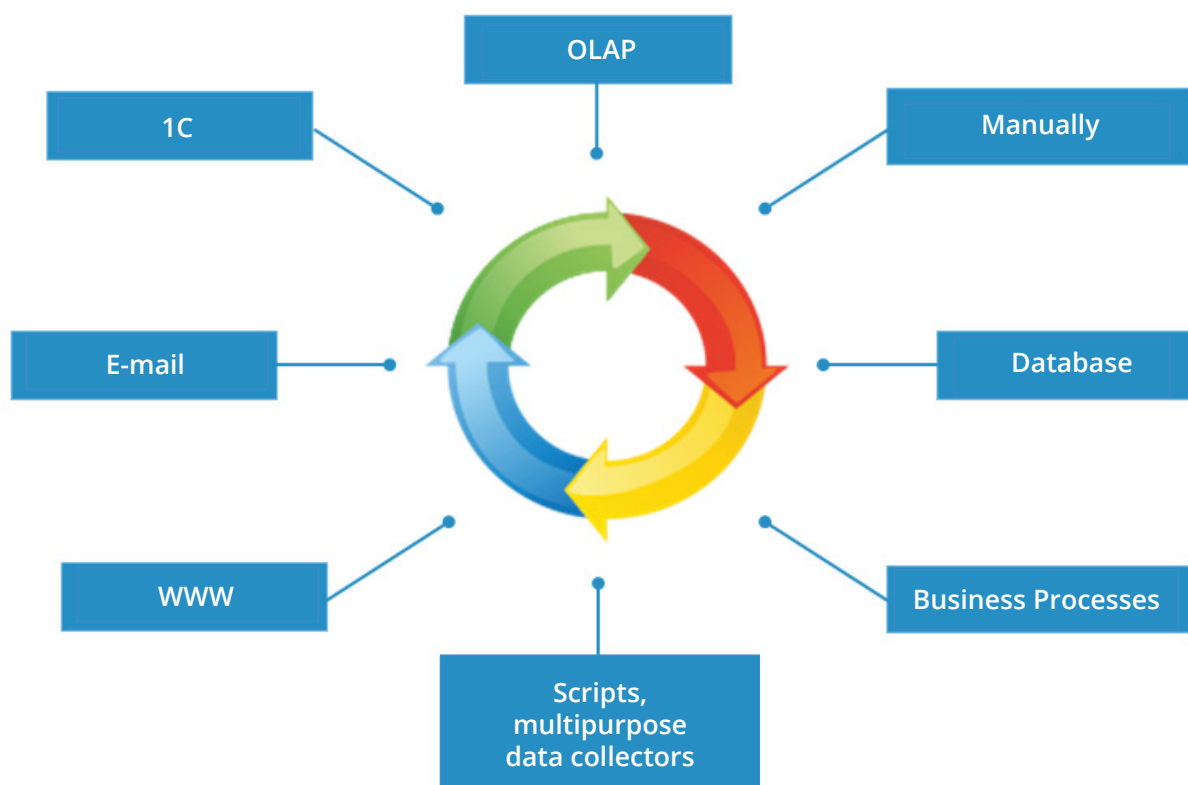


The screenshot displays the ELMA 3.9.5.28643 Configuration interface. The top navigation bar includes tabs for Menu, Organizational Structure, Processes, Objects, Document Management, Projects, KPI, Reports, Interface, BPM Apps, Scripts, and Publishing. The left sidebar shows a tree view of the organizational structure, with the 'Chief Executive Officer (01)' selected. The main area displays the 'Responsibility Matrices' section, which includes a table for 'Revenues' and a 'Supervisor' table. The 'Revenues' table has columns for 'Name' and 'Supervisor'. The 'Supervisor' table has a column for 'Name'. The 'Informed' table has a column for 'Name'. The interface also includes a 'Collect Data' button at the bottom left.



## 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.

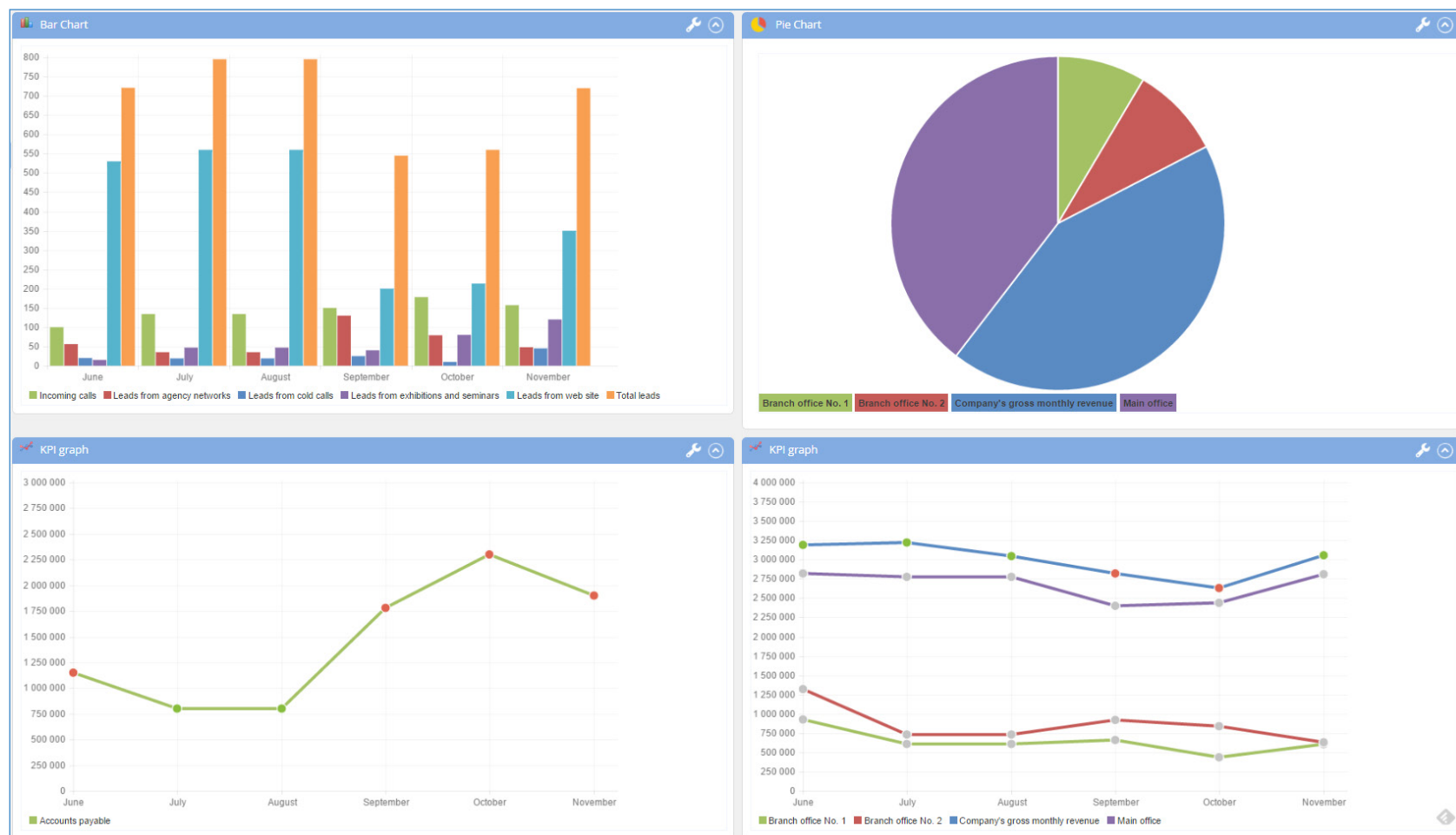
Indicator	Responsible	Periodicity	Period	Plan	Fact	Status	Trend
<b>Marketing</b>							
<b>Total leads</b>	Baldwin E.	Month	November	700 pcs.	720 pcs.	●	28.57% ↑
Incoming calls	Baldwin E.	Month	November		157 pcs.		-11.8% ↓
Leads from web site	Baldwin E.	Month	November		350 pcs.		64.32% ↑
Leads from agency 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% ↑
<b>Sales</b>							
<b>Company's gross monthly revenue</b>	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% ↓
<b>Service department</b>							
<b>Claims resolved with no incidents, %</b>	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% ↓
<b>Finance</b>							
<b>Accounts payable</b>	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 allow you to discuss all the relevant results and plans based 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.

**Nelson J. ( go to matrix )**  
Chief Technology Officer

Create Task Ask Question  
Add Comment

42.6 %

Performance **42.65%**

KPI	Weight: 50%	Plan	Fact	Performance: 42.65%
Claims resolved with no incidents, %	50%	100.00 %	85.29 %	85.29%
Total claims	0%		2,284 pcs.	0%
Claims resolved with no incidents	0%		1,948 pcs.	0%
<b>SMART Tasks</b>	Weight: 0%	Plan	Fact	Performance: 0%

**Collins E. ( go to matrix )**  
Deputy CCO, Head of Branch Office No. 2

Create Task Ask Question  
Add Comment

41.5 %

Performance **41.54%**

KPI	Weight: 100%	Plan	Fact	Performance: 41.54%
Company's gross monthly revenue (Collins E.)	100%	€ 650,000.00	€ 270,000.00	41.54%
Branch office No. 2 (Collins E.)	0%		€ 270,000.00	0%

**Taylor E. ( go to matrix )**  
Sales Manager, Sales Manager of Branch Office No. 1, Sales Manager of Branch Office No. 2

Create Task Ask Question  
Add Comment

90.0 %

Performance **90%**

KPI	Weight: 100%	Plan	Fact	Performance: 90%
Company's gross monthly revenue (Taylor E.)	100%	€ 400,000.00	€ 360,000.00	90%
Main office (Taylor E.)	0%		€ 360,000.00	0%

**Flores P. ( go to matrix )**  
Head of Sales Department

Create Task Ask Question  
Add Comment

150.0 %

Performance **150%**

KPI	Weight: 100%	Plan	Fact	Performance: 150%
Company's gross monthly revenue (Flores P.)	100%	€ 400,000.00	€ 600,000.00	150%
Main office (Flores P.)	0%		€ 600,000.00	0%

**Miller A. ( go to matrix )**  
Chief Commercial Officer

Create Task Ask Question  
Add Comment

91.0 %

Performance **91%**

KPI	Weight: 70%	Plan	Fact	Performance: 91%
Company's gross monthly revenue (Miller A.)	50%	€ 1,000,000.00	€ 1,300,000.00	130%
Company's gross monthly revenue (Miller A.)	20%	€ 1,000,000.00	€ 1,300,000.00	130%
Main office (Miller A.)	0%		€ 1,300,000.00	0%

**Webb E. ( go to matrix )**  
Chief Financial Officer, Economist

Create Task Ask Question  
Add Comment

0.0 %

Performance **0%**

KPI	Weight: 50%	Plan	Fact	Performance: 0%
Accounts payable	50%	€ 1,000,000.00	€ 1,900,000.00	0%
<b>SMART Tasks</b>	Weight: 0%	Plan	Fact	Performance: 0%

















































# 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

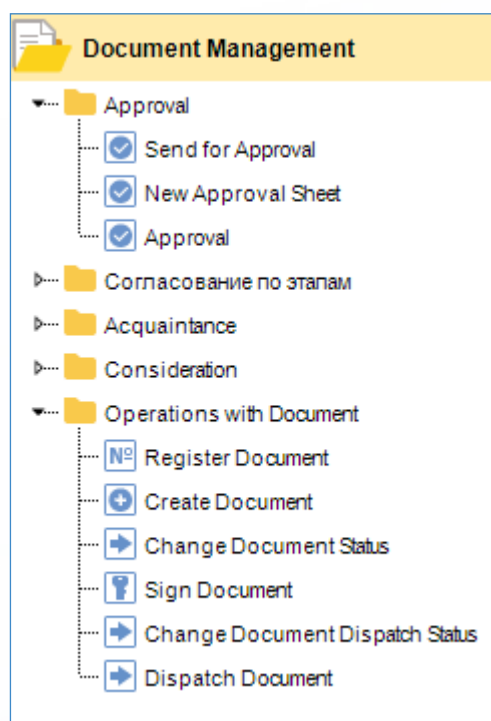
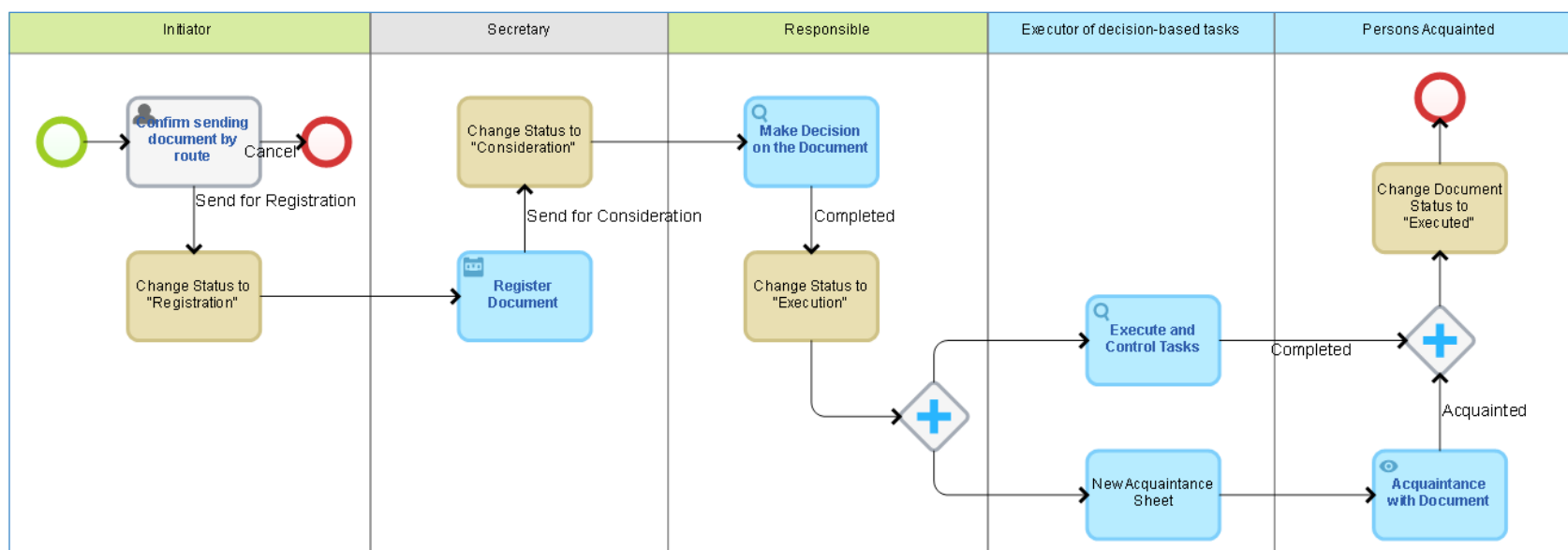
# CAPABILITIES OF ELMA ECM+

## 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:

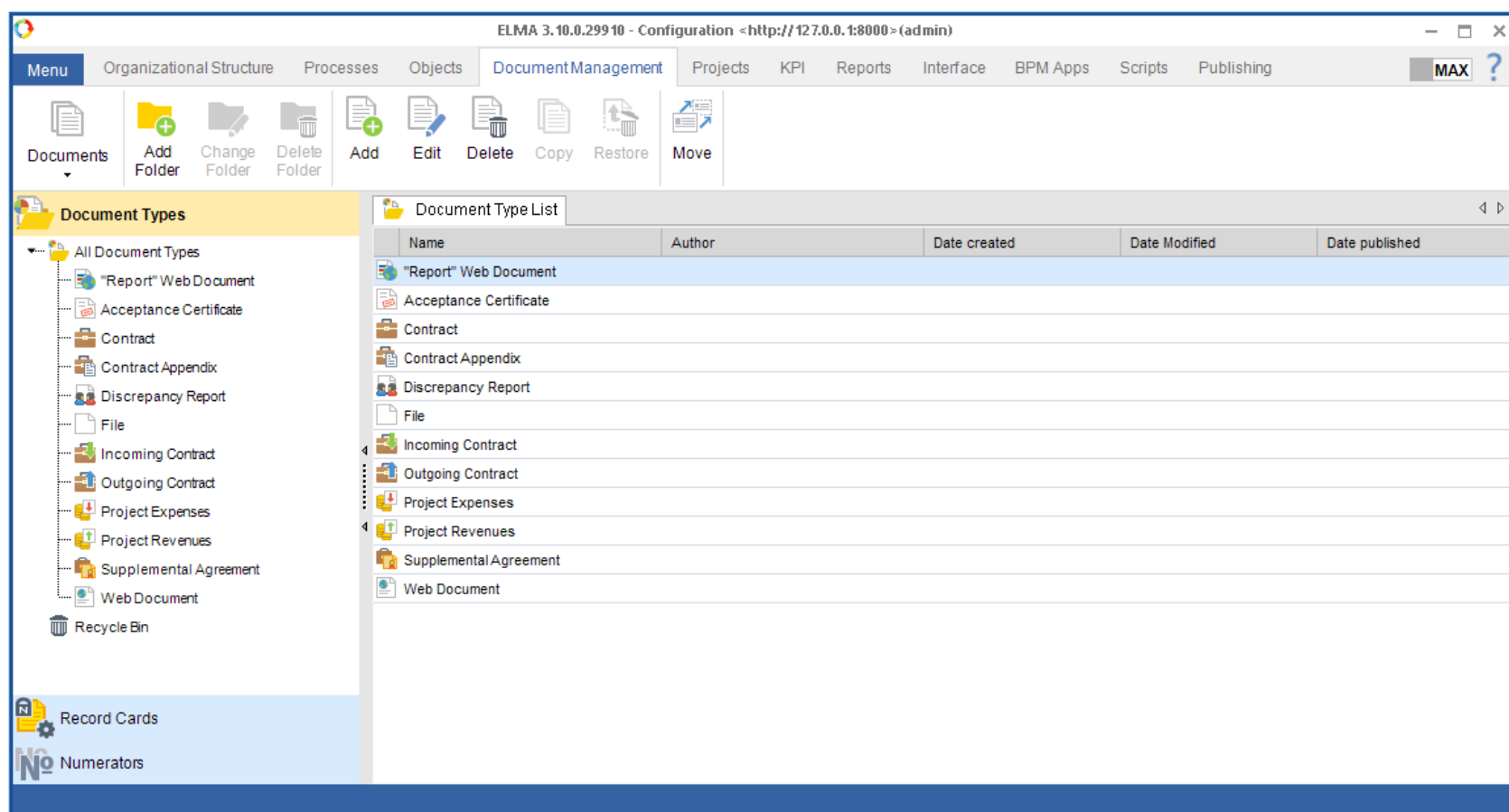
- documents move from one user to another as programmed;
- you can always check, where exactly in the route the document is;
- many document lifecycle stages can be automated, such as status update, approval and so on.



## 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.

```

{$BarcodeFile}          CONTRACT No{$Number}

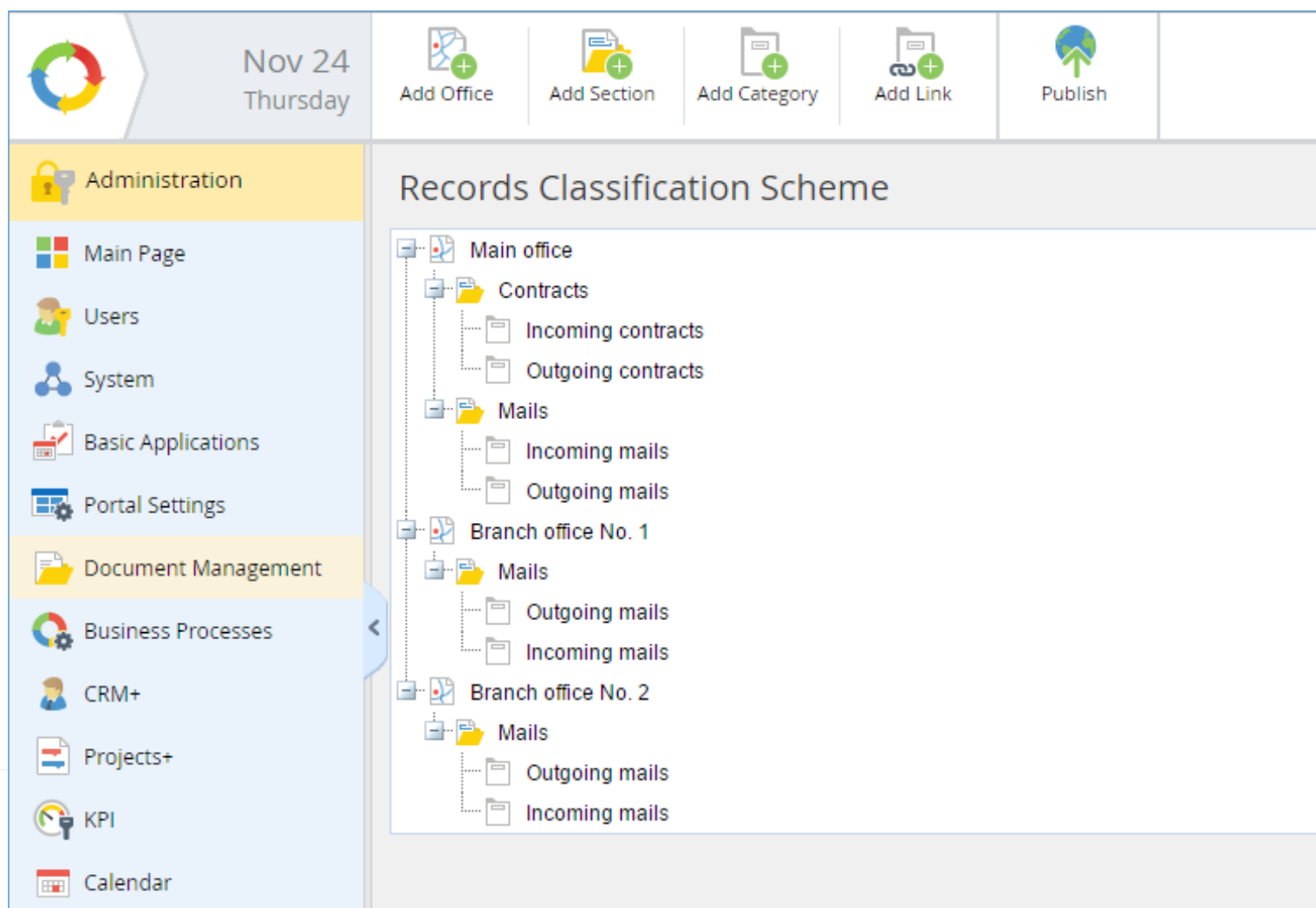
                        {$ContactDate.Day}.{$ContactDate.Month}.{$ContactDate.Year}

{$MyLegalPerson.Name} hereinafter referred to as Executor, and {$Contractor. Name} hereinafter
referred to as Customer, concluded the following Contract:
    
```

# 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.

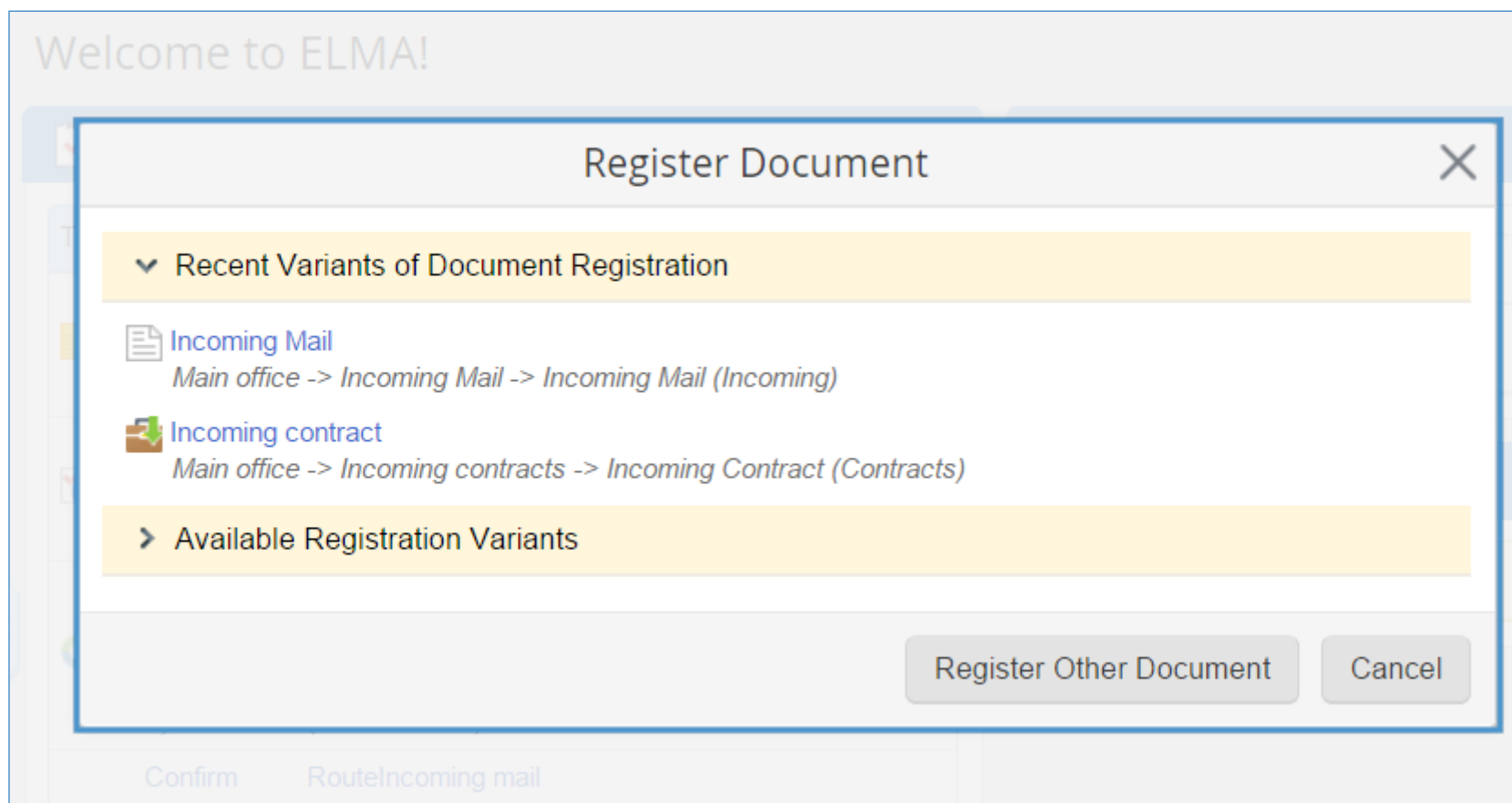




# Registration and Handling of Documents

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 Registration

Select Document Type  
Incoming Mail

Document Flow  
Incoming


Registration Office  
Main office

Category  
Incoming Mail


Save Cancel

# 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.



The document is confidential and encrypted. Enter the correct password to open this document.



Open Document



Nov 23  
Wednesday


Edit

Send





Actions

Linked Document

Add Version



Becker N.

Documents

Show Folders

Document "Employment contract"

General Information

Versions 1

Links 0

Access

Tasks 1

History

Approval 1

Additional Information

Document Type

Employment contract

Parent Folder

My documents

Date created

11/23/2016 3:18 PM

Author

Becker N.

Comments

Questions

Attachments

Actions

Sort by Date

Confidential

11/23/2016 3:19 PM

No current versions

Active Tasks > Active Document Tasks : 1

Page generated in 1046 ms ELMA v. 3.9.5.28595 R.1ee0922f5e404

# Digital Signature

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

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

Create a digital signature

Text to Sign

Document: InternalDoc.docx  
Creation Author: Administrator ELMA  
Creation Date: 21.12.2015 10:24:11  
Version: 1  
Creation Author: Administrator ELMA  
Creation Date: 21.12.2015 10:25:03  
Contains: 8d0bba9d15f71160da40b99c5c2c2706 (md5)


Signature Certificate \*

Brooks (21.12.2015)

Owner: E=Brooks@mail.ru, CN=Brooks  
Thumbprint: FDCF3CB596FF6568F3135E3FE2C31EEC3390DAD9

Sign

Cancel

Signature Information			
User	Digital Signature	Date signed	Comment
Administrator	 Brooks (attributes)	12/21/2015 10:29:10 AM	

# 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.

## Document Search

Search


[Advanced Search](#)

Quantity: 10
Items found: 39
Pages: 1 2 3 4



**Project charter.docx** (10/23/2015 6:03 PM Webb Helen)
Documents (Webb Helen)

ELMAUP.Support Contents Contents Introduction Glossary Service Plans Support Procedure Customer Lifecycle Types of Requests What is the Difference Between a Question and **Consulting** ? Request Status Behavior Matrix Changing Request Type to **Consulting** Contractor's Profile Support of Leads Implementation Support – With a Contract Support – Without a



**Specifications.Secret Key.docx** (9/17/2015 4:10 PM Brooks Tom)
Shared folders/Projects/Secret Key

ELMAUP.Support Contents Contents Introduction Glossary Service plans Support Procedure Customer Lifecycle Types of Requests What is the Difference Between a Question and **Consulting** ? Request Status Behavior Matrix Changing Request Type to **Consulting** Contractor's Profile Technical Support Provided to Leads Implementation Support (With a Contract



## 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.

☆ Document "Incoming Contract № 456"

General Information
Versions 1
Links 0/1
Access
Tasks 0
History
Contract Stages 0

Record Card Attributes "2015 / My Company / Incoming Contracts"

Document Attributes


No.	456
Contract Closed	No
Stages Closed	Yes
Expired	No
A contract is expired if at least one stage is expired	

Barcode
Barcode .bmp

Additional Information

Document Type	Incoming Contract
Parent Folder	My Documents
Date created	12/18/2015 10:15 AM

Registered
Signed
Administrator ELMA
Current Version
Incoming Contract.docx (No.1, Administrator ELMA)
Add Version







## Contract № 84

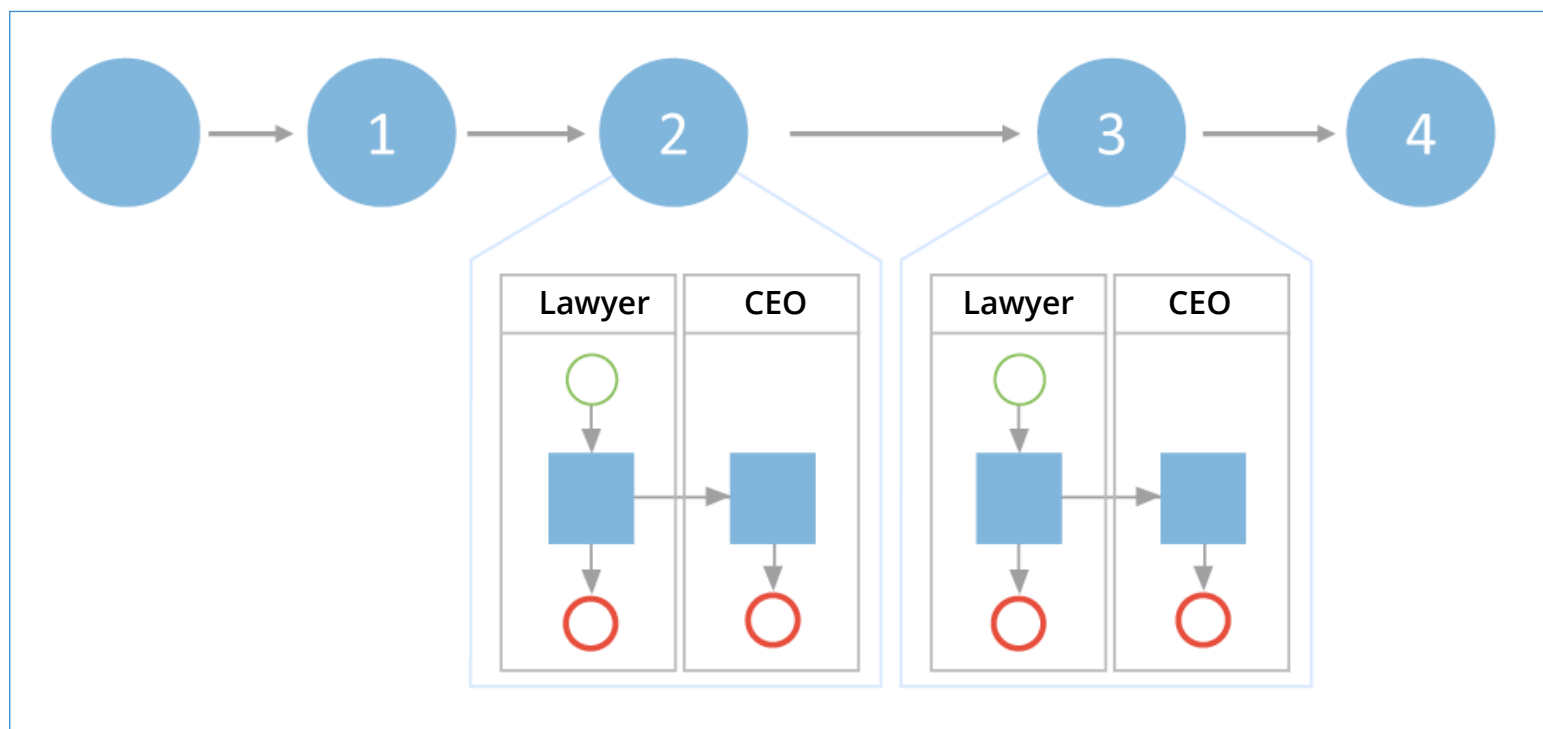
**08/06/2015**

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.



Save

Cancel

Administrator

1

2

Sales Funnel - Edit an item

Name \*

Basic Sales Funnel

Deal Stages \*

	Id	Name	Color	Funnel Narrowing (%)	Process
↕	1	01. Initial Contact	#0054a5	100	01. Initial Contact
↕	2	02. Collecting Information	#fff100	80	02. Collecting Information
↕	3	03. Selling Solution	#ed008c	60	03. Selling Solution
↕	4	04. Commercial negotiations	#00ffcc	40	04. Commercial Negotiations
↕	5	05. Contract signing	#0054a5	20	05. Contract Signing
↕	6	06. Contract execution	#0054a5	18	06. Contract Execution

+ Add Stage

# 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 or for selected groups of sales representatives.


To Stage From 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.


 International Exhibition 2015

About the Marketing Activity
 Contractors 1
 Leads 2
 Deals 0

Name	International Exhibition 2015	Budget	35,000.00
Description		Leads	
Group of Activities	Not selected	All	2 17,500.00
Responsible	Baldwin E.	Good leads	2 17,500.00
Activity Type	Base Type	In work	1 35,000.00
Labels	Not selected	Qualified	0 0.00
Status	Active	Deals	
Budget Type	Defined Manually	Total	0 0.00
		Success	0 0.00
		Failure	0 0.00

Type	Name	Responsible	Created	Leads	Deals	Budget
No data to display						

Comments
 Questions
 Actions
 Sort by Date

 Billboard Advertisement

About the Marketing Event
 Contractors 0
 Leads 0
 Deals 1

Name	Billboard Advertisement	Budget	Not specified
Description		Leads	
Marketing Activity	XVII International Scientific Conference	All	0
Responsible	Dunn T.	Good leads	0
Event Type	Not selected	In work	0
Labels	c5340028	Qualified	0
Status	Active	Deals	
Budget Type	Defined Manually	Total	1
		Success	0
		Failure	0

Comments
 Questions
 Actions
 Sort by Date

# 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.

Start Process

To start the process, enter the process instance name;  
select the process and click **Send** or press **Enter**:

**Process Instance Name \***

**Process \***

Create Package of Documents

Send

Cancel

Start Process

Create Task

Attach Document

Actions

Call

Contact

Administrator

1

2

Company - REWE Markt

About the Company

Attributes

Activity

Contacts

Relationships 0

Deals 0

Tasks 0

Attachments 0

Name

REWE Markt

Type

Customer

Type of Business Organization

Not selected

Partner

Regional Group

Austria

Company's Day

Industry

Marketing

Website

rm.com

Annual Revenue

84,000,000.00

E-Mail

rm@gmail.com

Staff

563

Phone Number

Responsible

Collins E.

Fax

Description

Categories

Not selected

Marketing Event


Not selected

# 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.

Outgoing Call


Call

8-912-280-10-10

Waiting


Subject \*

Outgoing Call


Description

Comment


Further Actions


Add Call


Execute the relationship and create a new call


Add Meeting


Execute the relationship and create a new meeting


Add Mail


Execute the relationship and schedule mail



Add Deal


Execute the relationship and create a deal



Close

Close Relationship


Save


Cancel


Select Customer


Miller A.

5

89

Incoming Call: + (353) 20-30-11-40 (Contact)

Call Information

Subject \*

Comment

About the Contact

Last Name \*

First Name \*

Middle Name

Contractor \*

Department

Job Positions

Priority

Regular

Web Site

E-Mail

ICQ

Empty

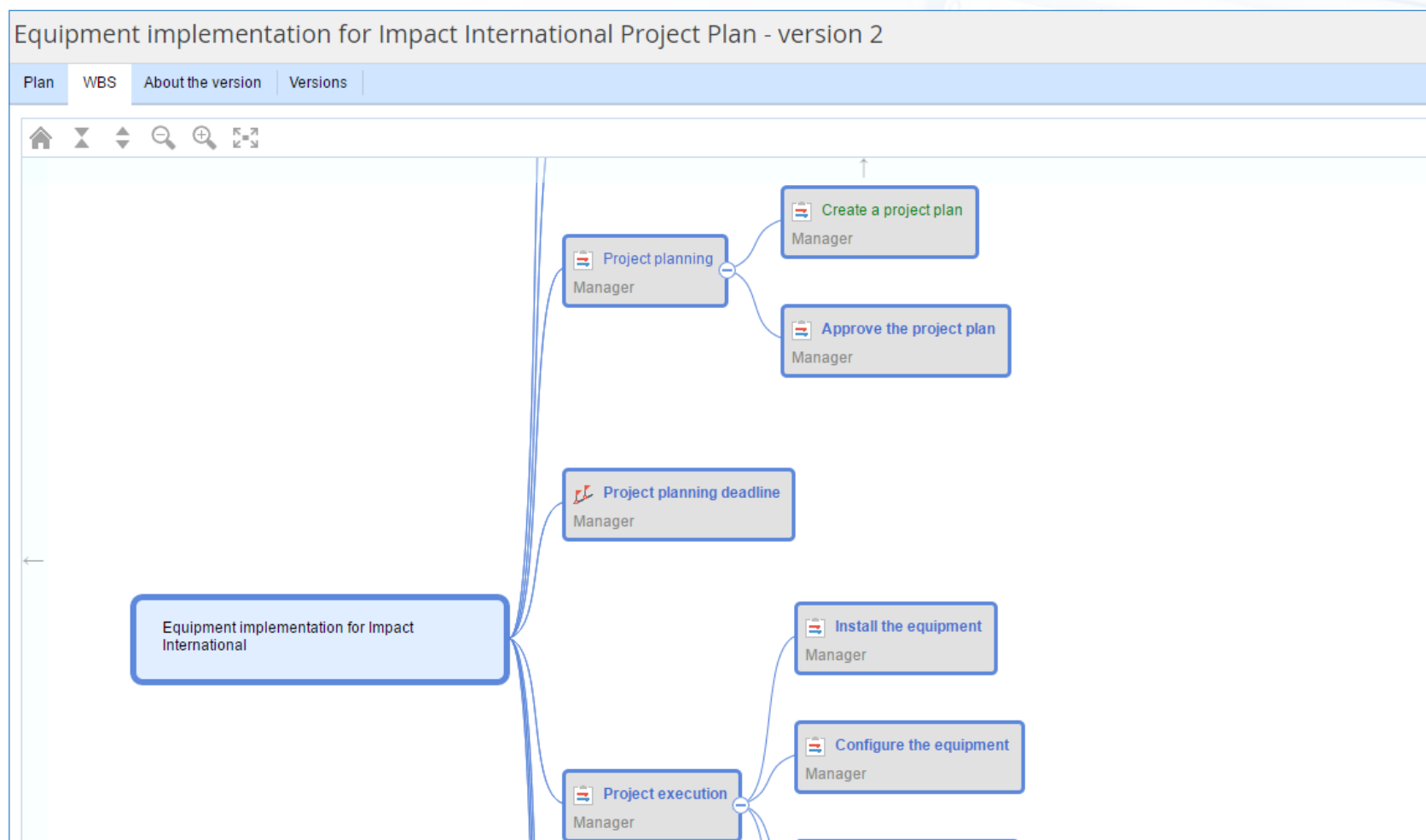
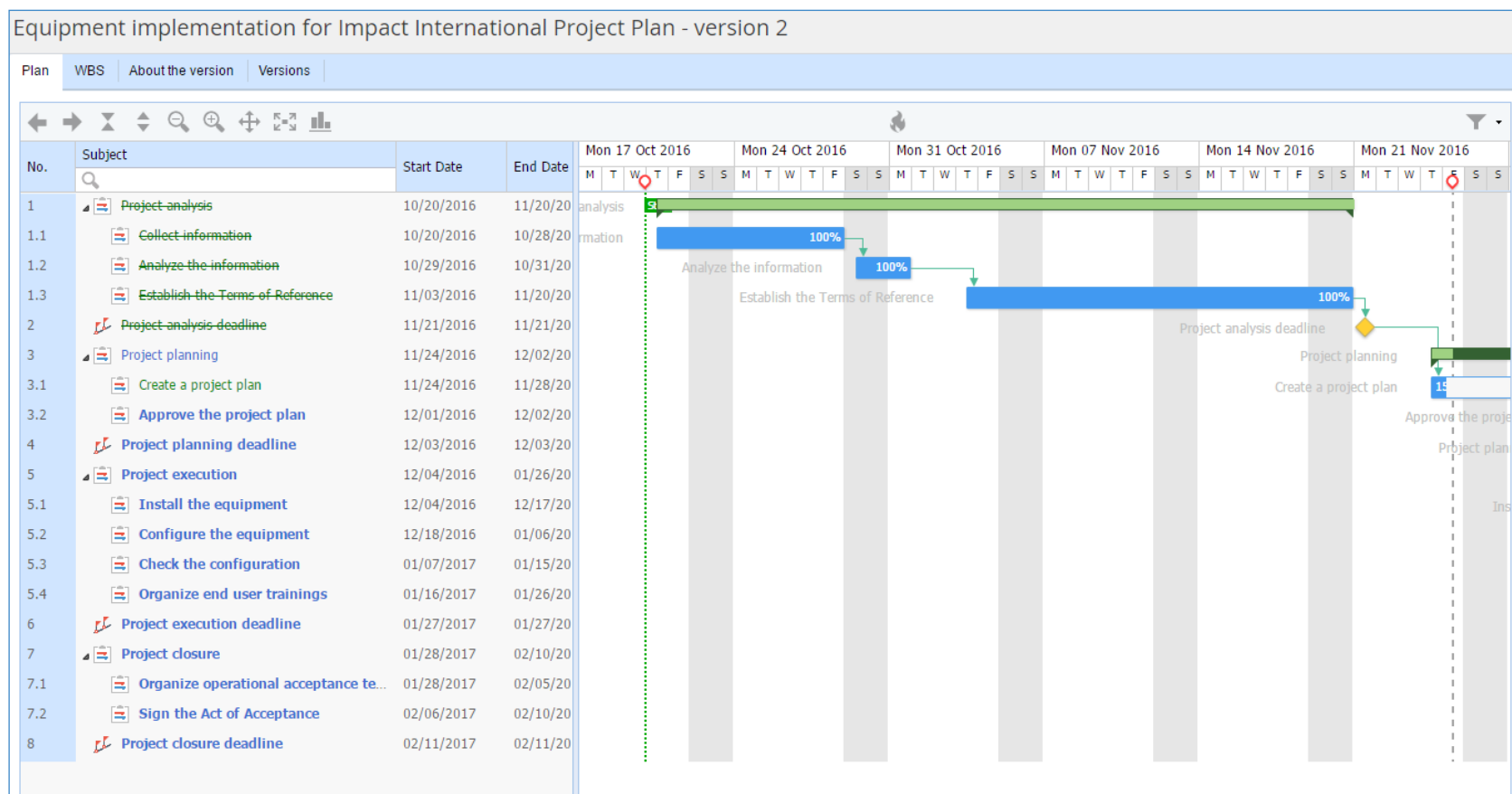
Skype

# 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.

Plan			
About the version   Versions			
			
No.	Subject	Start Date	End Date
1	 <b>Hold a meeting on the project initiation</b>	09/07/2015	09/08/2015
2	 <b>Approve the project documentation</b>	09/09/2015	09/14/2015
2.1	 <b>Obtain construction permit</b>	09/09/2015	09/09/2015
2.2	 Approve construction documentation	09/10/2015	09/14/2015
3	 <b>Prepare building site</b>	09/15/2015	09/29/2015
3.1	 Perform site engineering work	09/15/2015	09/22/2015
3.2	 Install a fence	09/23/2015	09/28/2015
3.3	 Lay on-site roads	09/23/2015	09/28/2015
3.4	 The site is ready for construction	09/29/2015	09/29/2015
4	 <b>Perform initial construction work</b>	09/29/2015	10/21/2015
4.1	 Perform earthwork	09/29/2015	10/08/2015
4.2	 Perform foundation work and build...	10/09/2015	10/15/2015

Compare schedules

Compare plan version

Version 3

×

Q

▼

Plan

▼

With plan version

Version 4

×

Q

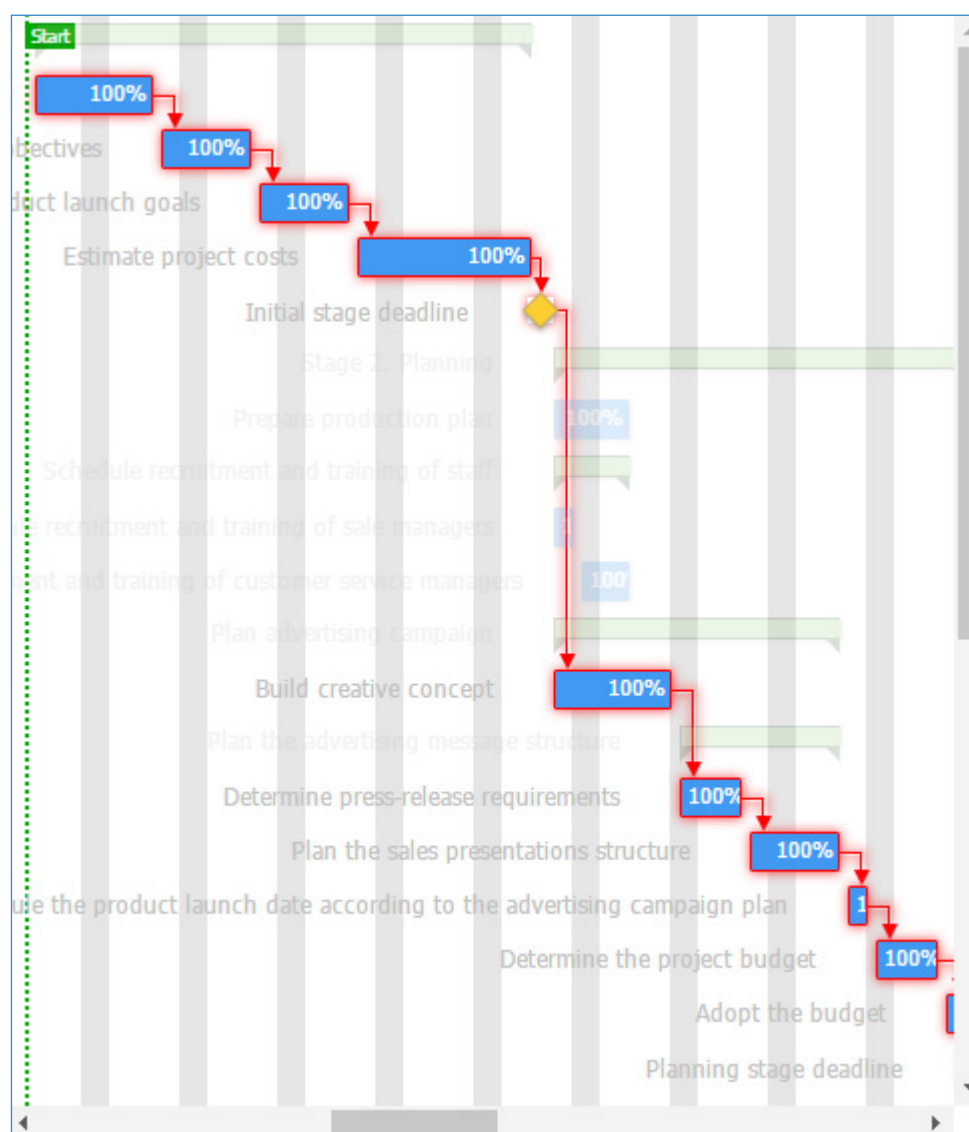
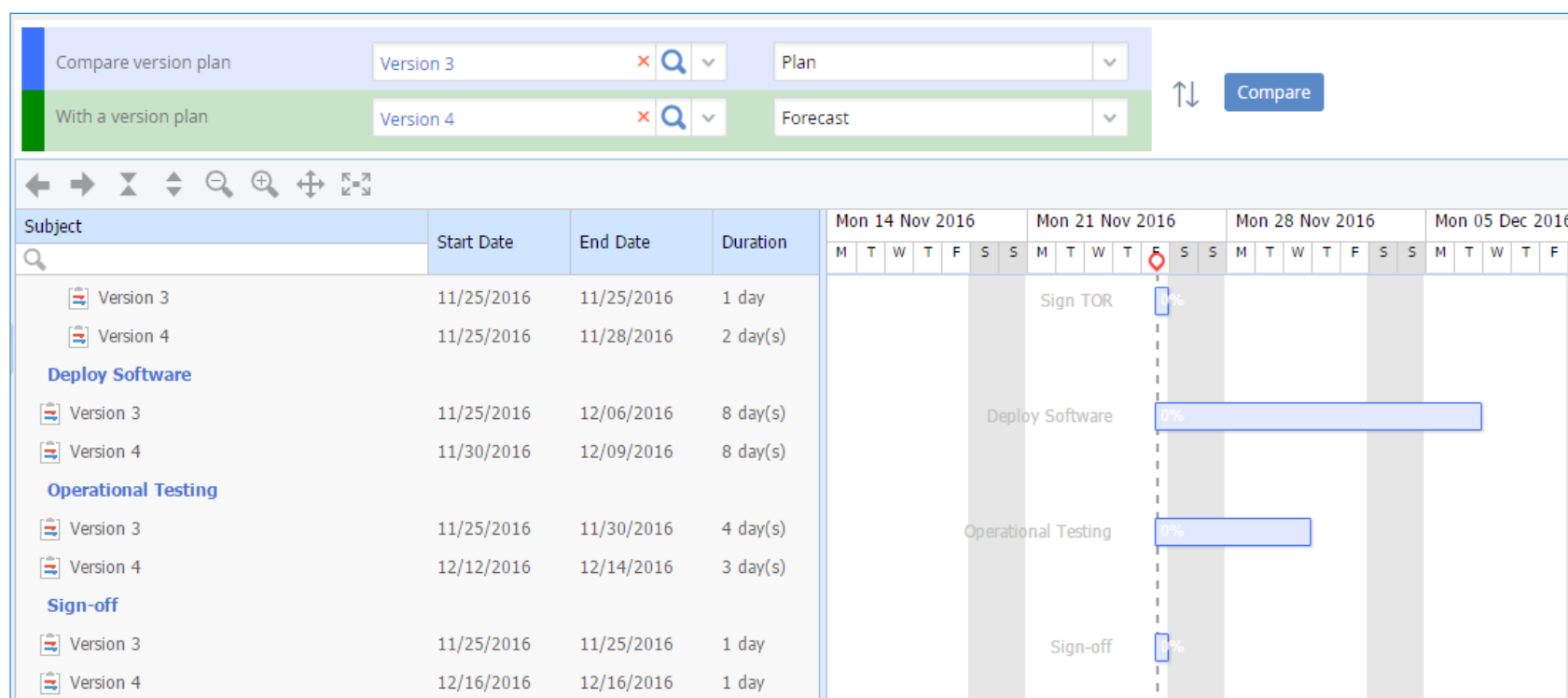
▼

Forecast

▼

Compare

Cancel



# 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.

## Project - Bring SMART LK to Market

General Information

Project Stage: Release to manufacturing

Project End Date: from 11/12/2015 till 5/1/2016

Manager: Walker S.

Project Role

Project Team Members: Baldwin E., Dunn T., Rodriguez A., Gibbs C., Nelson J., Swanson S.

Project Supervisors: Head of Project Office

Project Observers:

Project Plan

Subject	Start Date	End Date	Executor	%
Stage 1: Initiation	11/12/2015	12/17/2015		100
Choose the product launch team	11/12/2015	11/20/2015	Manager	100
Determine sales strategic objectives	11/21/2015	11/27/2015	Manager	100
Set product launch goals	11/28/2015	12/04/2015	Manager	100
Estimate project costs	12/05/2015	12/17/2015	Manager	100
Initial stage deadline	12/18/2015	12/18/2015	Manager	100
Stage 2: Planning	12/19/2015	01/17/2016		100
Prepare production plan	12/19/2015	12/24/2015	Nelson J.	100
Schedule recruitment and training of...	12/19/2015	12/24/2015		100
Schedule recruitment and training...	12/19/2015	12/20/2015	Rodriguez A.	100
Schedule recruitment and training...	12/21/2015	12/24/2015	Rodriguez A.	100

Project Messages

+ Add Message

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

**Public Channel Message #Bring SMART LK to Market** Yesterday 03/10/2016 8:18 AM

Message from: Walker S. to: #Bring SMART LK to Market

**Bring New Product to Market:** Bring SMART LK to Market

The date of meeting about release to manufacturing is changed from 10 a.m. to 11:30. I will be conducting a webinar at 10 a.m.

Baldwin E. Yesterday 03/10/2016 8:31 AM

Great! I cannot be there at 10 a.m. either.

Add Comment

Project Documents

You can create a document of the File type by dragging files from File Explorer to this page. These files will be automatically uploaded to the server and attached to the documents you create.

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

Name	Author	Date created
Financial Documentation	Shaw S.	2/23/2015 4:44 PM
Creative concept.docx	Baldwin E.	4/9/2015 12:04 PM
Staff training schedule.xlsx	Rodriguez A.	4/7/2015 12:07 PM

Budget

Subject	Item	Date	Plan	Fact
Closure			0.00	0.00
Expenses, Outpayme...			8600...	9475...
Staff training expen...	Staff training expenses		3000...	4500...
Preparation			0.00	0.00
Work in progress			5600...	4975...
Advertising cam...	Advertising campaign		5600...	4975...
Closure			0.00	0.00
Result			-860...	-947...
Preparation			0.00	0.00
Work in progress			-560...	-497...
Closure			0.00	0.00
No phase specified			-300...	-450...

Project Risks

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

Technology risks Regular

Tight schedule High

My Project Tasks

Type	Priority	Subject	End Date	%
No data to display				

Project Tasks from Me

Tasks from Me: Active: 0; Overdue: 0

Completion Check (1)

Update the production program according to the forecast changes Baldwin E.

Project Task Bring SMART LK to Market (Shaw S.)

Today (0)

No data to display



# 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 Messages

+ Add Message

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



Public Channel Message

06/19/2015 2:54 PM

#Equipment implementation for Impact International. Project status report

Message

from: Shaw S. to: #Equipment implementation ...

Equipment Implementation:



Equipment implementation for Impact International

Accomplished this week: Created Terms of Reference  
To accomplish next week: Approve the project plan  
Issues: Though the Terms of Reference are approved, the Contractor's project manager is continuously increasing the project scope. We have to do something about it unless we're over the budget in the end.  
Contractor's mood: Fine  
Milestone status: on time  
Additional information: no



Walker S.

06/19/2015 5:18 PM

For this project we'll do the tasks specified in ToR. Let's form another work scope for extra tasks.

Add Comment

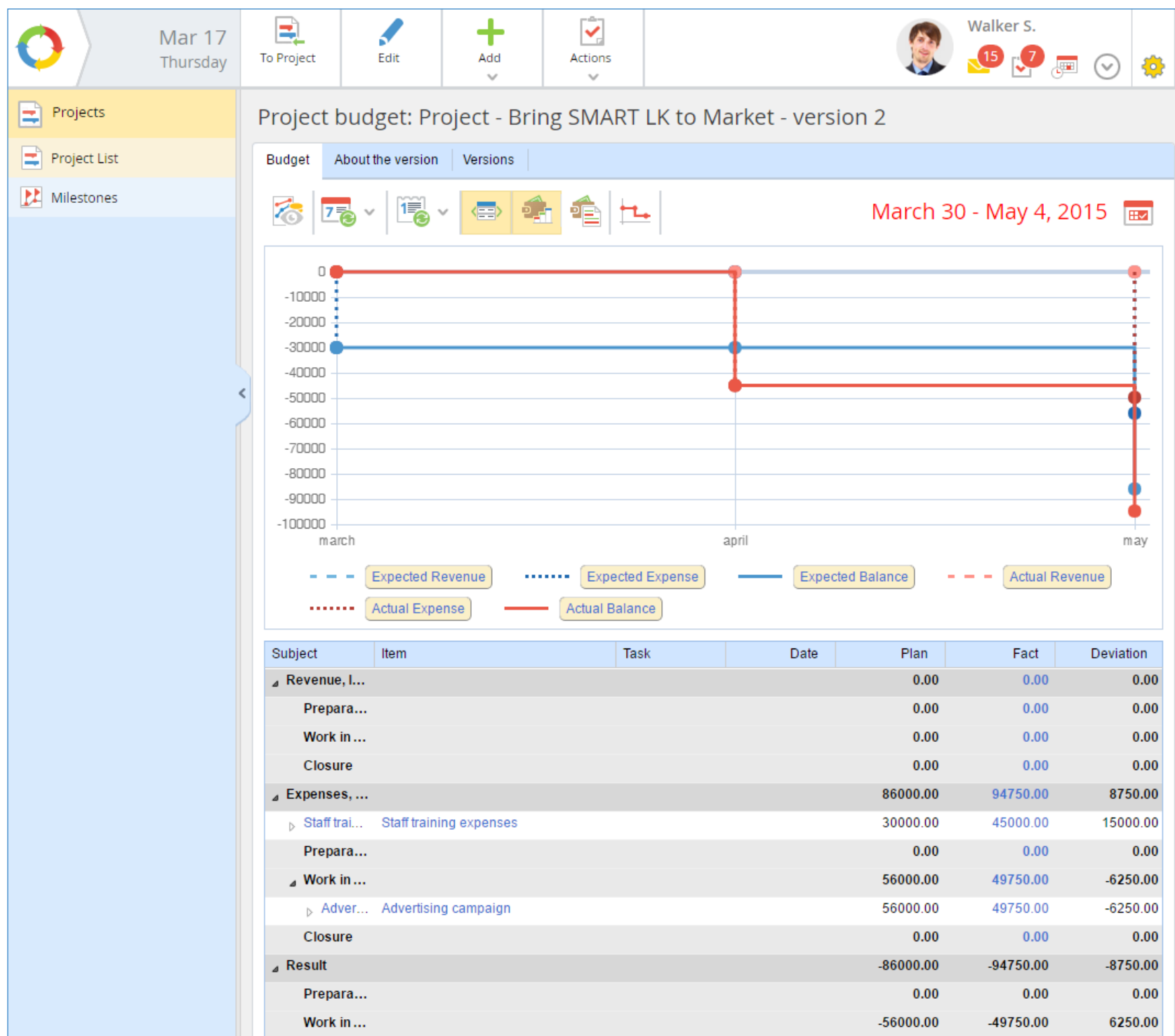


# Project Budget Control

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.



## Financial Documentation

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



Advanced Search

↑ ... \ (level up)


Quantity: 15

Items found: 2

Pages: 1




<input type="checkbox"/>	Name	Author	Date created
<input type="checkbox"/>	Advertising campaign.docx of 1/3/2015	Walker S.	5/3/2015 7:16 PM
<input type="checkbox"/>	Staff expenses.docx of 5/3/2015	Walker S.	4/15/2015 7:25 PM
<input type="checkbox"/>	Advertising campaign.docx of 4/15/2015	Walker S.	5/3/2015 7:16 PM
<input type="checkbox"/>	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

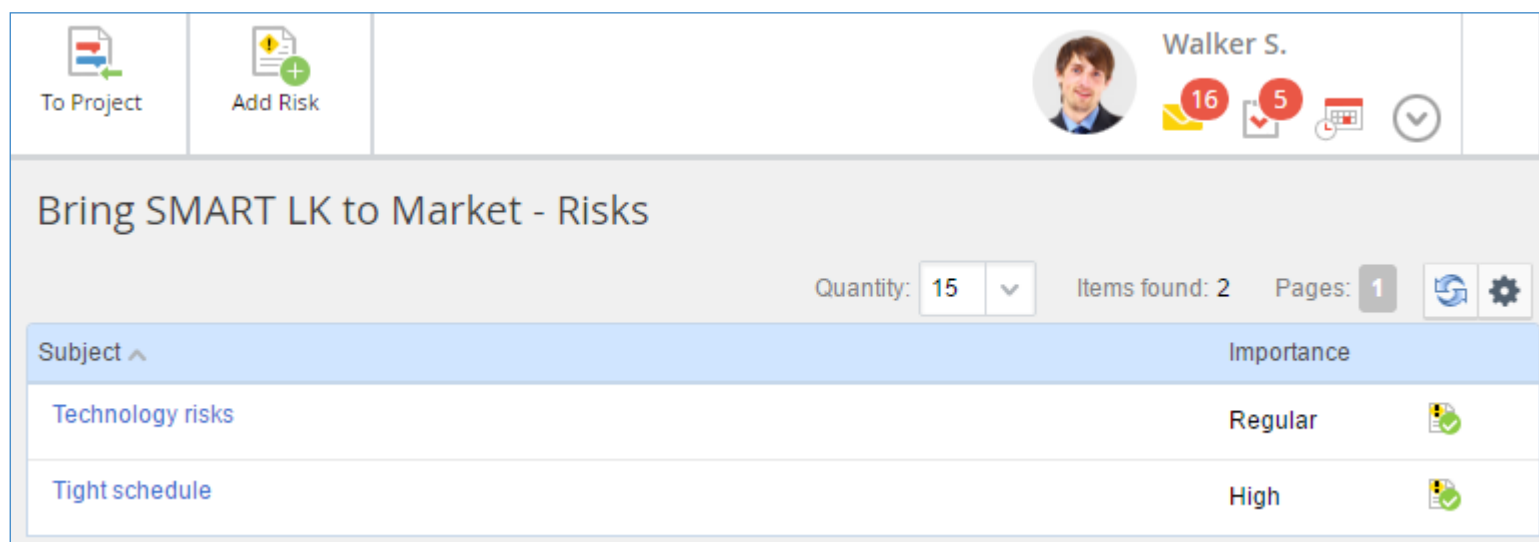
End Date: 11/22/2015 to 05/11/2016

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

## 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.



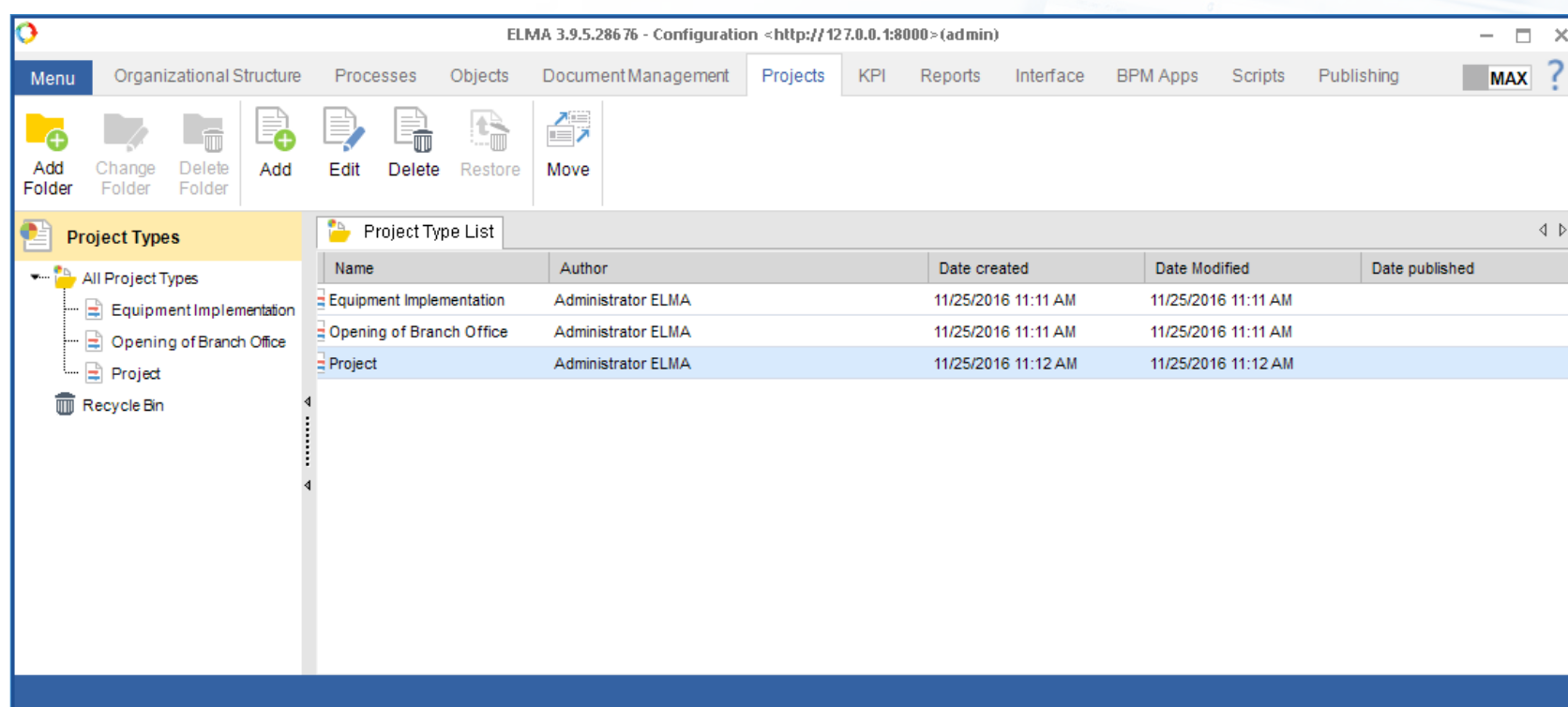
The screenshot shows a user interface for managing risks. At the top, there are buttons for 'To Project' and 'Add Risk'. The user's profile 'Walker S.' is visible with notification counts (16, 5) and a calendar icon. The main title is 'Bring SMART LK to Market - Risks'. Below the title, there are filters for 'Quantity: 15', 'Items found: 2', and 'Pages: 1'. A table lists the risks:

Subject ^	Importance
Technology risks	Regular
Tight schedule	High

## Modeling Project Types

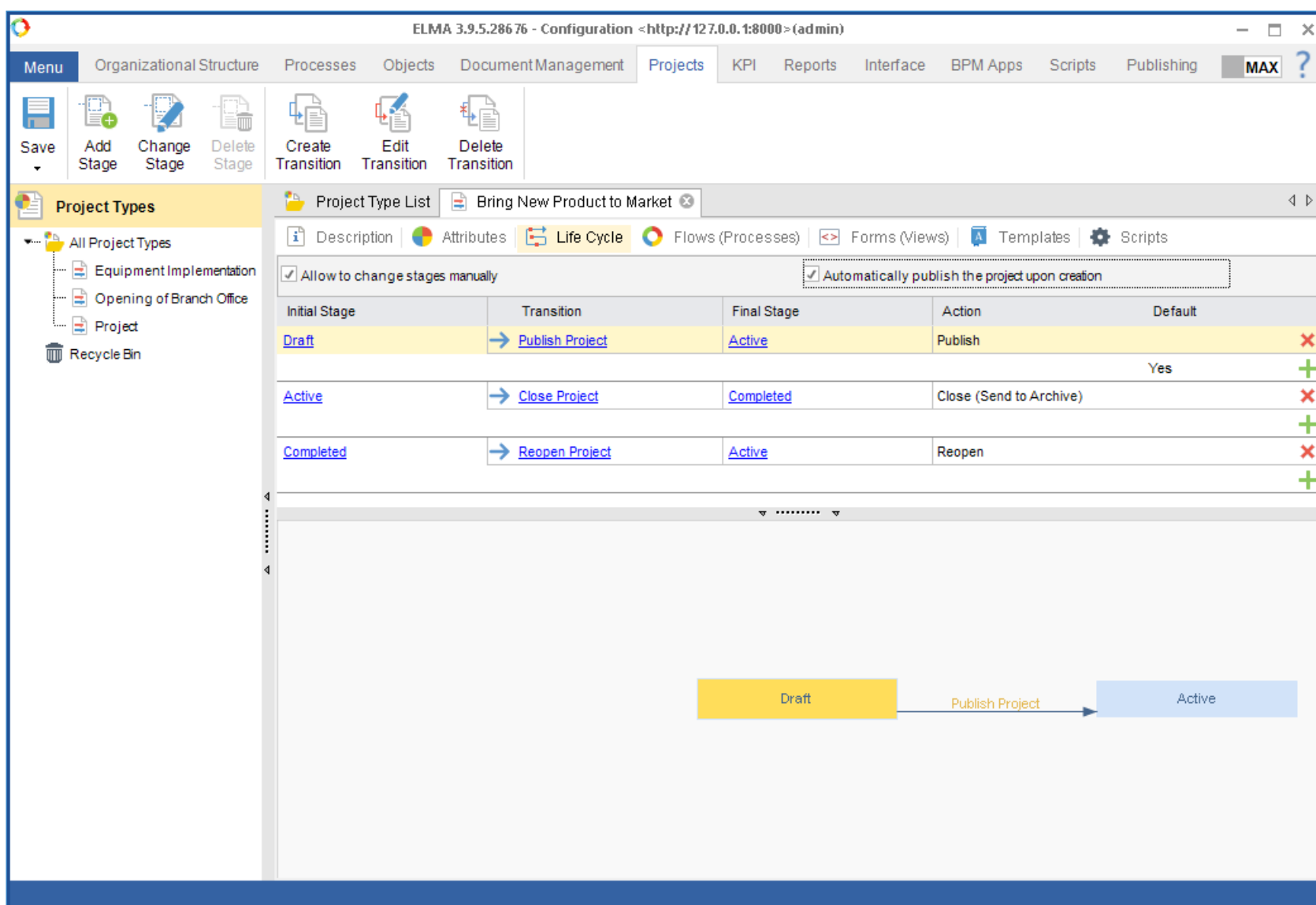
Project conveyor is a special approach for quick delivery of standard projects by means of optimizing the most common procedures. Modeling project types is an integral part of setting up the project conveyor. First, you need to define the most common project types in your organization. Then, for each 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.



The screenshot shows the 'ELMA 3.9.5.28676 - Configuration' window. The 'Projects' tab is selected. The 'Project Types' section is active, showing a list of project types. The table below represents the data shown in the screenshot:

Name	Author	Date created	Date Modified	Date published
Equipment Implementation	Administrator ELMA	11/25/2016 11:11 AM	11/25/2016 11:11 AM	
Opening of Branch Office	Administrator ELMA	11/25/2016 11:11 AM	11/25/2016 11:11 AM	
Project	Administrator ELMA	11/25/2016 11:12 AM	11/25/2016 11:12 AM	



## 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.

X

Start a business process

To start a process, select one, enter the instance name and press Enter or click Send

Process Instance Name \*

Request for overtime for project Bring SMART LK to Market

Process \*

Request for Overtime

Send

Cancel



## Limited Access to Business Information

[+ Add Group](#)