

# Customization of ELMA Web Interface

User Manual



Business Process  
Management Software

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## Introduction

This manual describes how you can customize the interfaces of ELMA Web Application according to your company's brand.

Some settings belong to the basic features of the ELMA BPM platform (see 0), so they are managed easily. Other settings are used rarely and require you to edit system files.

**Attention!**

Before modifying system files, make sure to create a backup copy of the file you are editing.

Adjusting the system to your company's needs might require modification that are not covered by this document. In such cases, please contact us.

# Chapter 1. Basic features of ELMA BPM Platform

## 1.1. Changing the color scheme

You can change the color scheme of ELMA Web Application. The default color scheme is shown on Fig. 1:

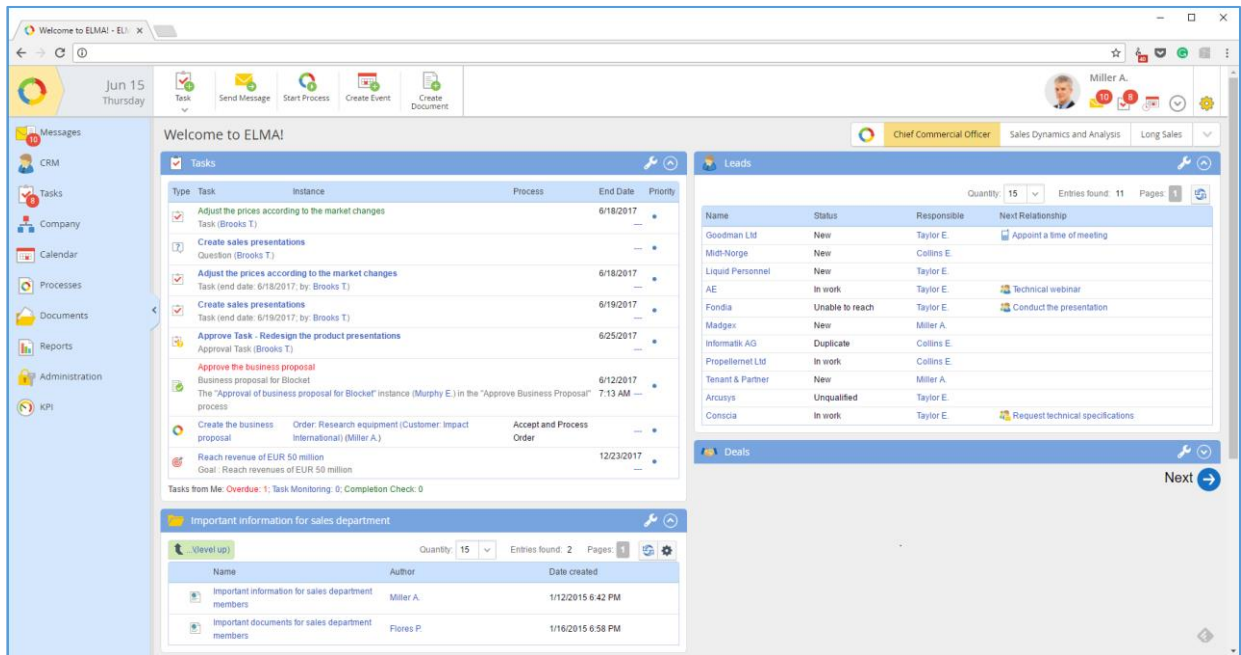


Fig. 1 Default color scheme

To change the color scheme, go to **Administration – System – Color scheme settings** (Fig. 2). Here you can change the background color of the page, of the left menu and of other sections.

Color scheme settings	
General background color	#ebebeb
Left menu background color	#7bcd9
Left menu submenu unit background color	
Left menu top unit background color	
First level menu background color	#fff799
Second level menu background color	#7bcd9
Third level menu background color	
Button color when the cursor is over it in the left menu	#6ccff7
Top menu background color	#fff
Button color when the cursor is over it in the top menu	
Portlet headers background color	#438ccb
Table headers background color	#fff467
Table units headers background color	
Current calendar day selection background color	

Fig. 2 Color scheme settings

Fig. 3 shows an example of a different color scheme.

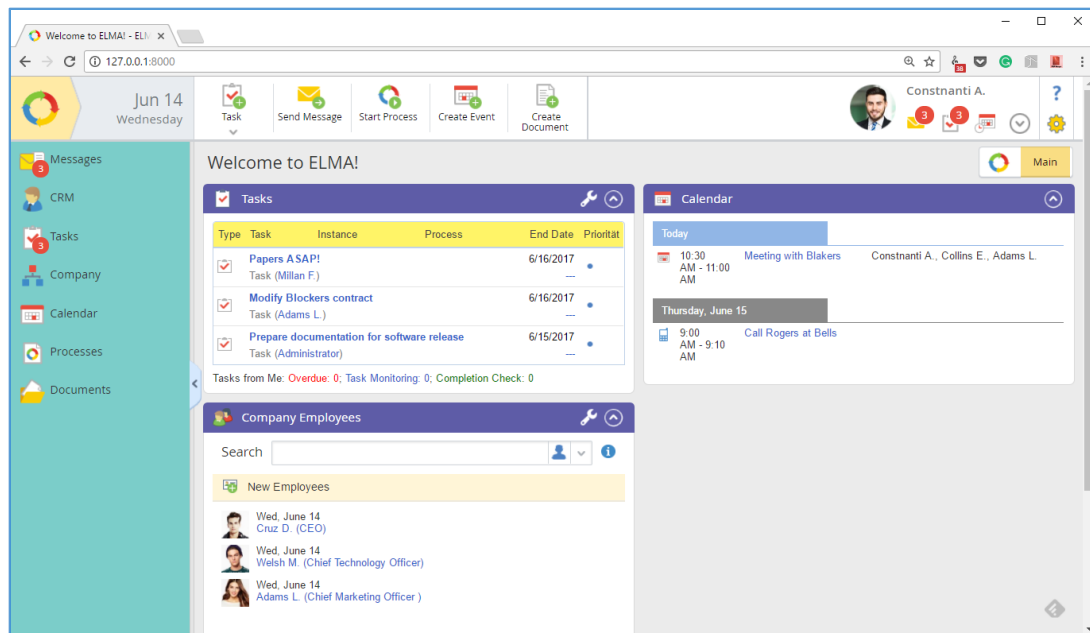


Fig. 3 Changed color scheme

## 1.2. Creating user pages

In ELMA, you can create and edit user portlet pages to display, for example, company information, certain visuals or other content.

To create and edit portlet pages, go to **Administration – Portal Settings–Pages**.

Once a portlet page is created, you can edit it. Use an HTML-portlet if you want to add your company’s design to the page.

Here is an example of a user page featuring information about the company (Fig. 4):

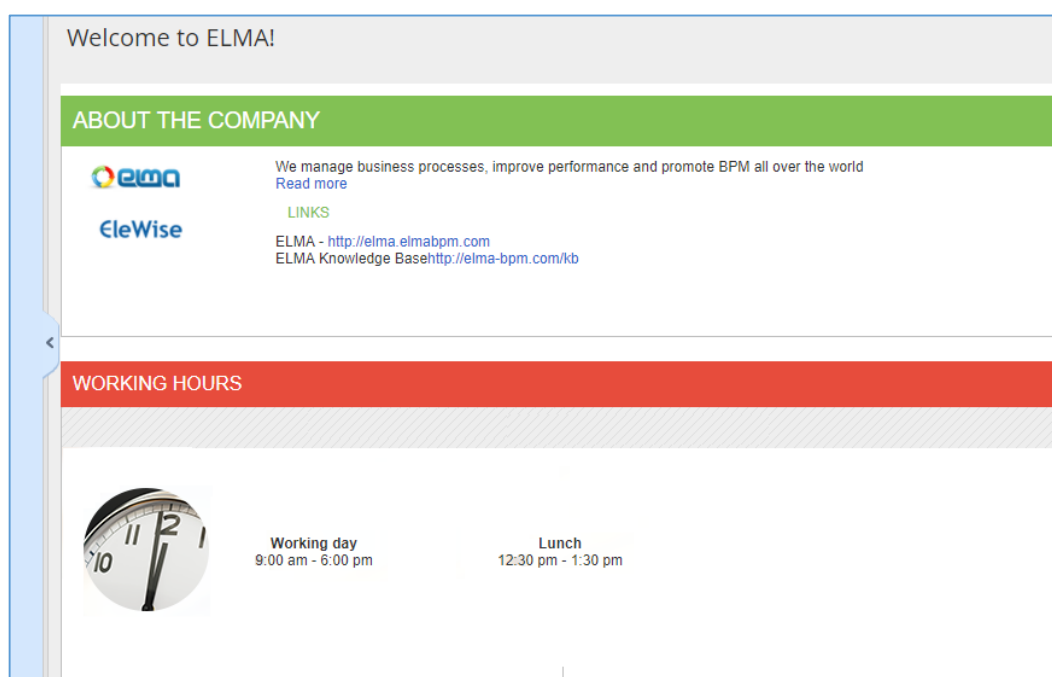


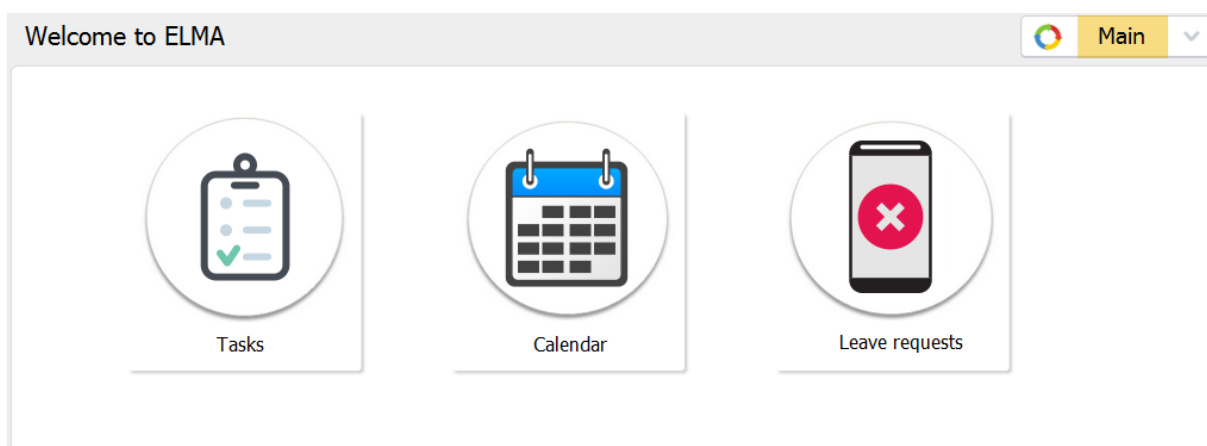
Fig. 4 User page

### 1.2.1. Main page adapted for mobile devices

To make the system more mobile-friendly, we recommend adapting the main pages in the following way:

- Delete excessive information and text;
- Add to the main page portlets with links to all the main sections of the system;
- Make the buttons and link icons larger.

Fig. 5 shows an example of a page adjusted for mobile devices.



*Fig. 5 Mobile adapted page*

### 1.3. Creating and configuring user menu

In ELMA, you can configure the main menu and the left menu by deleting and adding menu items. You can also set up access permissions to the menu items.

Menu items are edited in the visual editor in ELMA Web Application (Fig. 6).

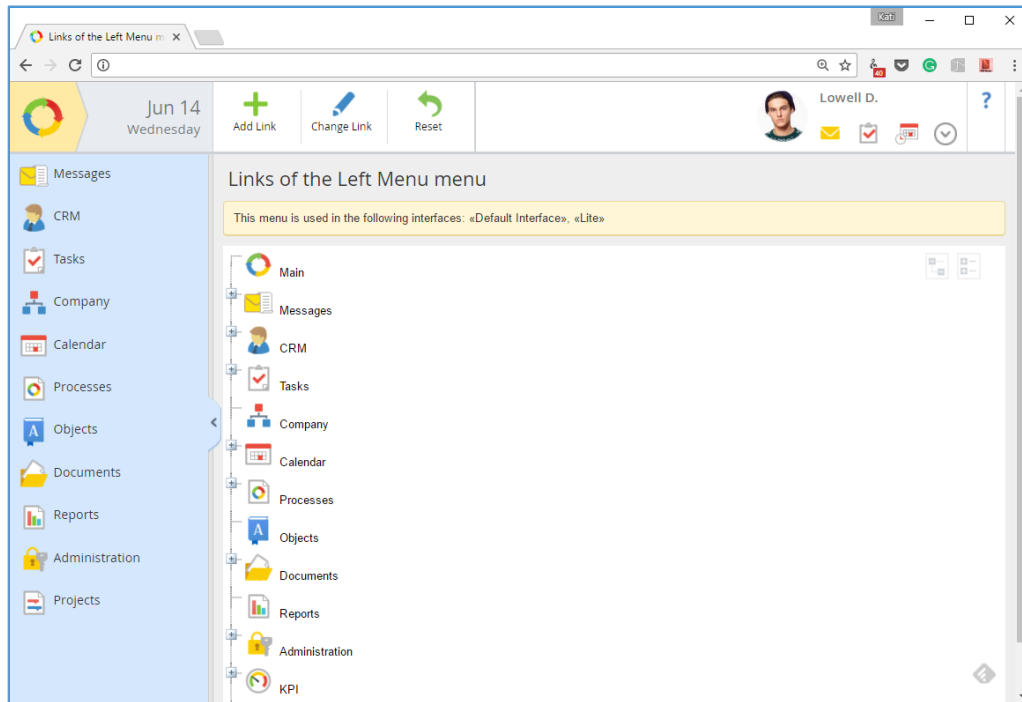


Fig. 6 Visual interface editor

When you add a menu item, you can also add a corresponding icon and select the position of the item in the main menu (Fig. 7).



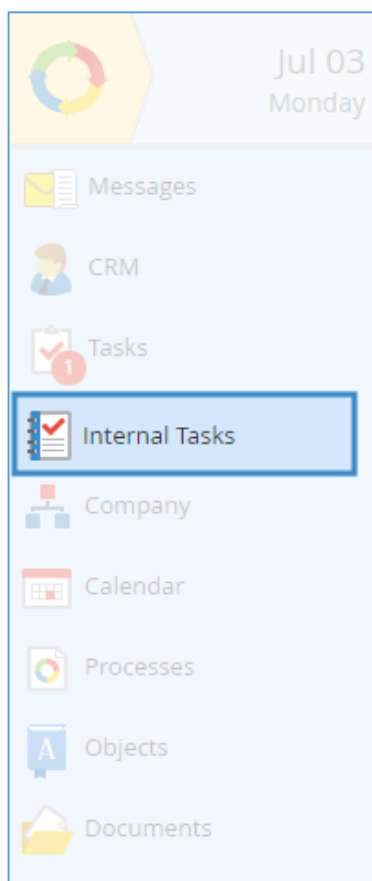


Fig. 7 Custom menu item

For more thorough editing, or if you wish to use new menu items in other configurations and do not wish to adjust them manually, we recommend managing menus within each system section. You can read more about adding custom menu items [here](#).

## 1.4. Modifying icons of folders and document types

You can change default folder icons when creating a folder or when editing it.

To change a folder icon, specify the path to the required icon in the **Icon** field of the editing dialogue box (Fig. 8).

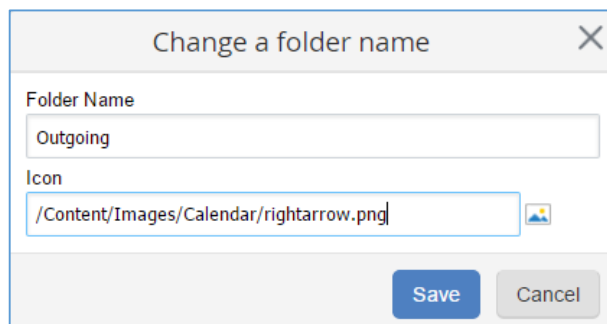


Fig. 8 Editing a folder

The icon will be updated in all the sections of the system. Fig. 9 shows the **Incoming** and **Outgoing** folders with their new icons.

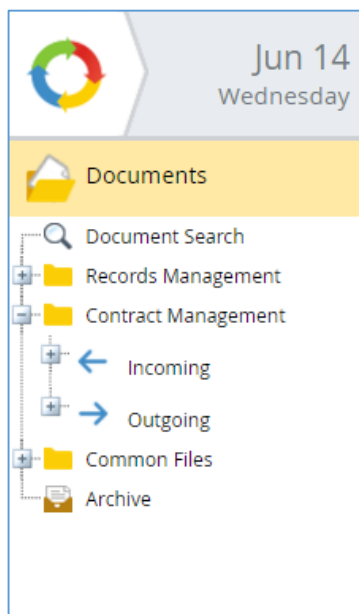


Fig. 9 Folders' user icons

You can also change the icons of the document types.

Go to the **Document Management** section of ELMA Designer; open the form for creating/editing a document (Fig. 10) and click **Add Icon** in the **Icons** field. Then upload the icon from your computer and click **Open**.

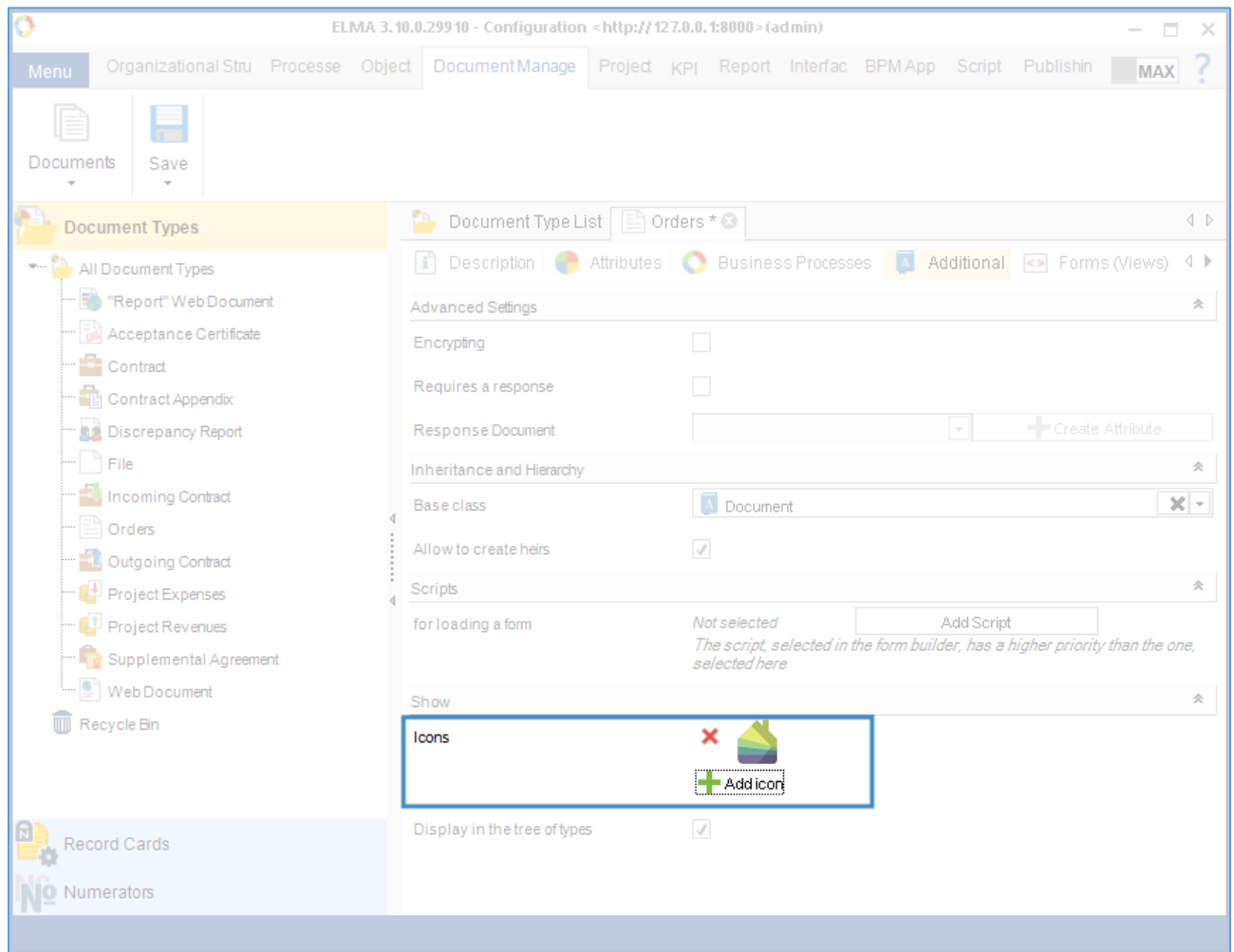


Fig. 10 ELMA Designer. Icons field

To apply the changes, save and publish the document type, and then restart the ELMA server. The icon will then appear in both ELMA Designer and the Web Application (Fig. 11).

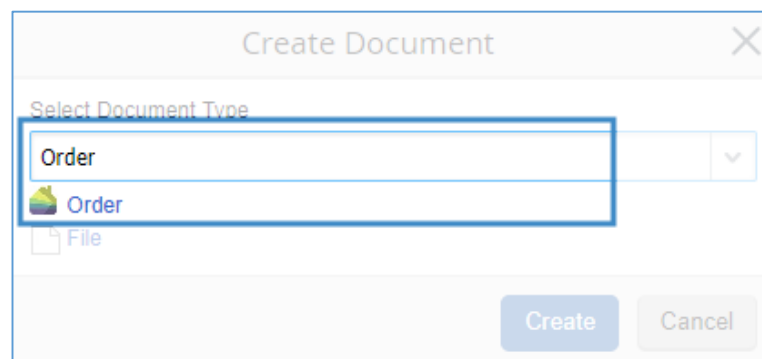
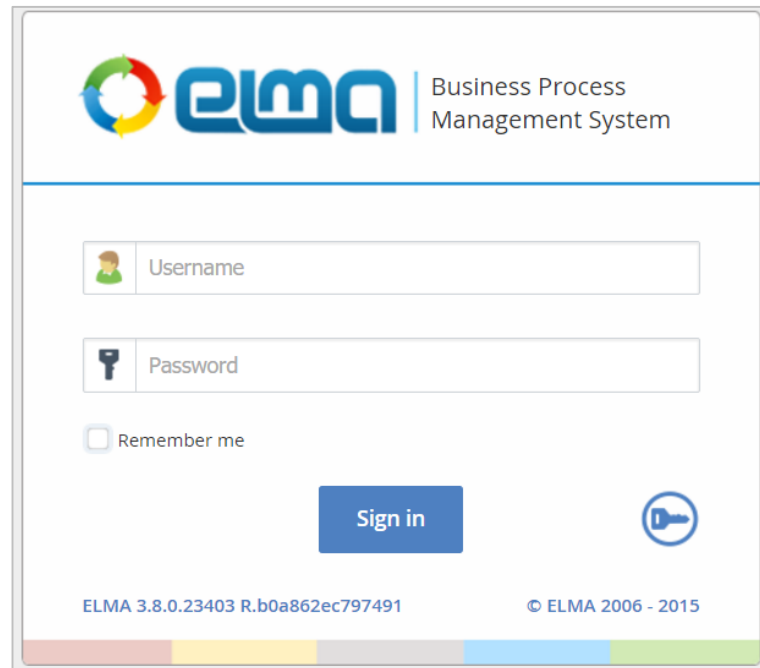


Fig. 11 Document type box

## Chapter 2. Advanced configuration

### 2.1 Authentication window

You can change the design and content of the default authentication window (Fig. 12).



*Fig. 12 Default authentication window*

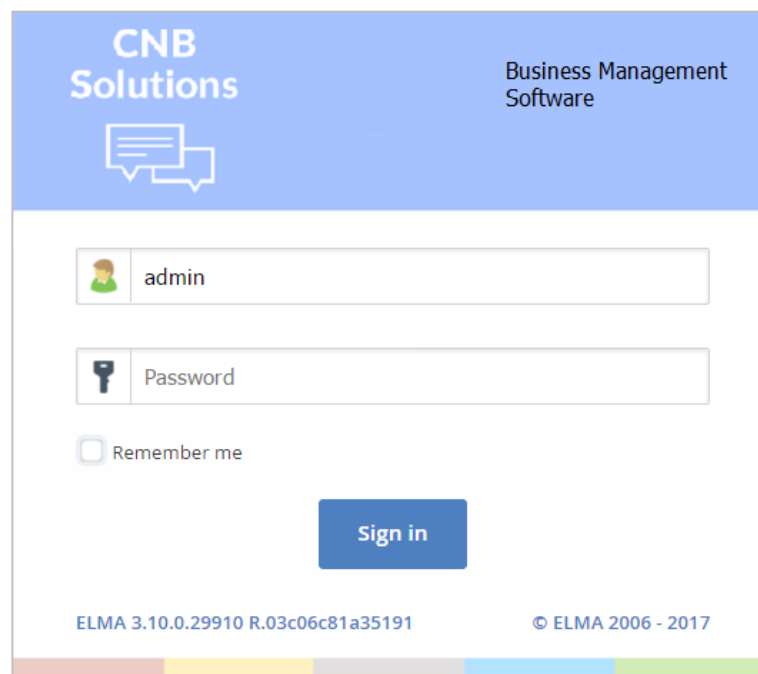
To change the design, replace the images in **..\< ELMA System Folder>\Web\Content\Images\Logon**. For example, you can change the company logo (Fig. 13).



The image shows a web-based authentication window for 'CNB Solutions Enterprise Content Management'. The header is a blue bar with the company name and logo on the left, and the product name on the right. Below the header, there are two input fields: one for the username 'admin' and another for the password, labeled 'Password'. A 'Remember me' checkbox is located below the password field. A blue 'Sign in' button is centered below the inputs. At the bottom, there is a footer with the version 'ELMA 3.10.0.29910 R.03c06c81a35191' and the copyright '© ELMA 2006 - 2017'. The bottom of the page features a horizontal bar with five colored segments: red, yellow, grey, blue, and green.

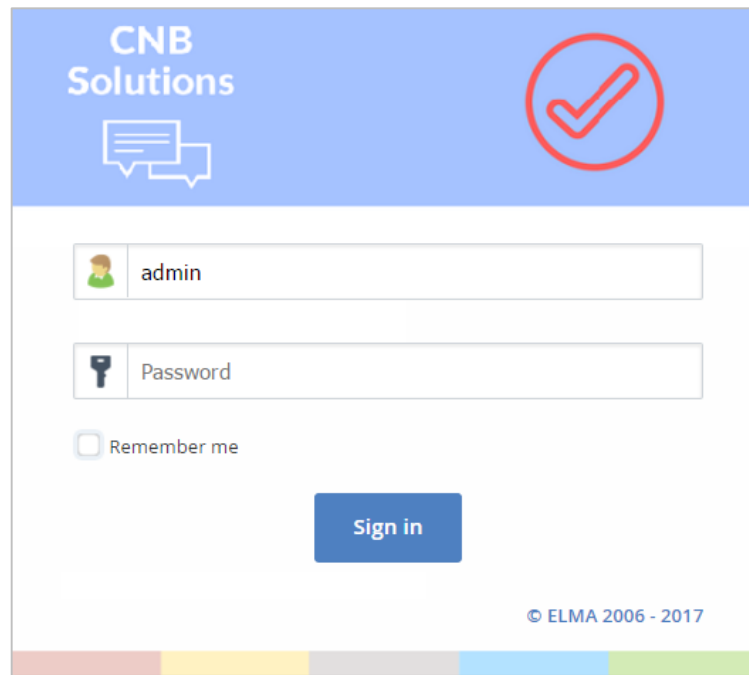
Fig. 13 Authentication window with a different logo

To modify the content, edit the **LogOn.cshtml** file in **..\<ELMA System Folder>\Web\Modules\EleWise.ELMA.BPM.Web.Security\Views\Account**. For example, you can change the information about the company (Fig. 14, Fig. 15).



This image shows a modified version of the authentication window. The header now reads 'CNB Solutions Business Management Software'. The layout is identical to Figure 13, with the same input fields for 'admin' and 'Password', the 'Remember me' checkbox, the 'Sign in' button, and the footer containing the version and copyright information. The same five-colored horizontal bar is at the bottom.

Fig. 14 Authentication window with a different text



The image shows a web-based authentication window for 'CNB Solutions'. The header is blue with the company name and a speech bubble icon on the left, and a red checkmark in a circle on the right. Below the header, there are two input fields: the first is for a username, with a person icon and the text 'admin'; the second is for a password, with a key icon and the text 'Password'. Below these fields is a checkbox labeled 'Remember me'. A blue 'Sign in' button is positioned below the 'Remember me' checkbox. At the bottom right of the form area, there is a copyright notice: '© ELMA 2006 - 2017'. The bottom of the window features a horizontal bar with five colored segments: red, yellow, grey, light blue, and green.

*Fig. 15 Modified authentication window*

You can read more about modifying the authentication window in [this Knowledge Base article](#).

## 2.2. Modifying the main menu button

The main menu button (Fig. 16) can also be changed. For example, you can add your company's logo.



Fig. 16 Default main menu button

Here is what you have to do to change the icon:

1. Copy **Layout.cshtml** from **..\<ELMA System Folder>\Web\Themes\ELMATheme\Views** and place it in **..\<ELMA System Folder>\UserConfig\WebApplication\Themes\ELMATheme\Views**. If there are no such folders in **UserConfig**, create them.
2. Add code to the file that you have copied.
3. Then go to **..\<ELMA System Folder>\Web\Content\Images\MenuImages** and find the **StartButtonSprite.png** file. Copy it to **..\<ELMA System Folder>\UserConfig\WebApplication\Content\Images**. If there is no such folder, create it.
4. Modify the file that you have copied. The size of the saved image must be 243\*72 pixels.

Before following through with these operations, you must stop the server. Also, restart your browser after making the changes. Then the changes will be applied (Fig. 17):



Fig. 17 Main menu button with a different logo

You can read more about modifying the button of the top menu in [in this Knowledge Base article](#).

### 2.2.1. Changing the default greeting

You can change the default greeting that appears on the main page (Fig. 18).

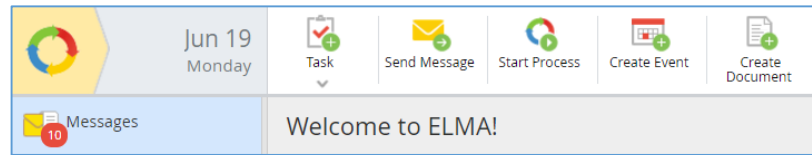


Fig. 18 Main page. Default greeting message

For that, modify the **Home.cshtml** file stored in **..\<ELMA System Folder>\Web\Modules\EleWise.ELMA.BPM.Web.Content\Views\Page**. Fig. 19 shows an example of the modified greeting message.

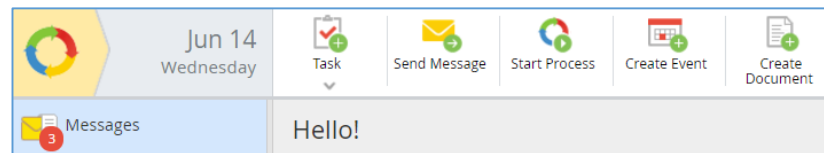
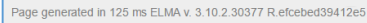


Fig. 19 Main page. Changed greeting message



### 2.3. Changing the lower part of a page

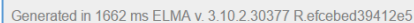
In the bottom right corner of all the pages in ELMA Web Application, you can see information about the time the page was generated, and the system version (Fig. 20). If needed, you can hide or change this information.

A small rectangular box with a light blue border containing the text: "Page generated in 125 ms ELMA v. 3.10.2.30377 R.efcebed39412e5".

Page generated in 125 ms ELMA v. 3.10.2.30377 R.efcebed39412e5

*Fig. 20 Default message*

By default, the changes are made in the **Layout.cshtml** file located in **..\<ELMA System Folder>\Web\Themes\ELMATheme\Views**. Here is an example of how you can change the displayed information (Fig. 21):

A small rectangular box with a light blue border containing the text: "Generated in 1662 ms ELMA v. 3.10.2.30377 R.efcebed39412e5".

Generated in 1662 ms ELMA v. 3.10.2.30377 R.efcebed39412e5

*Fig. 21 Changed message*

Note, that if you have previously edited the [main menu button](#), meaning that the **Layout.cshtml** file was moved to a different directory, for editing the footer information you need go to **..\<ELMA System Folder>\UserConfig\WebApplication\Themes\ELMATheme\Views** and modify the **Layout.cshtml** file there.

## 2.4. The ELMA server start box.

When the ELMA server is starting, the ELMA page shows the progress of the server. In the right bottom corner of the progress bar, you can also see the information about the current version of the system (Fig. 22). You can hide this information if you want to.

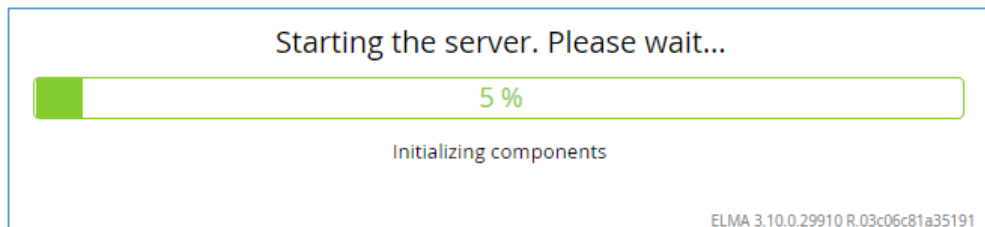


Fig. 22 Default server start box

To hide it, make corresponding changes in the **StartInfo.aspx** file stored in **..\<ELMA System Folder>\Web**. Without the information about the system version, the progress bar will look like this (Fig. 23):

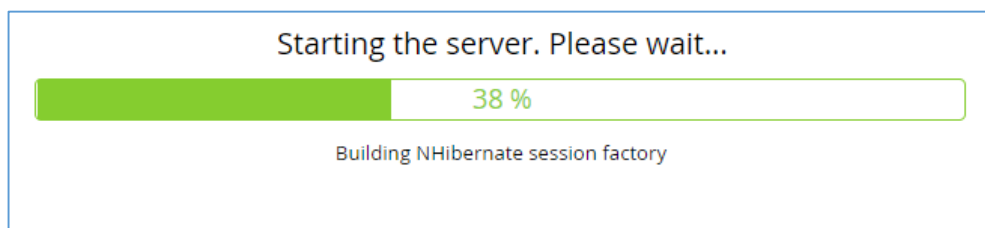


Fig. 23 Modified server start box

## 2.6. User modules

You can create custom modules for ELMA if you wish to add certain features. Such modules are written in C# in Visual Studio.

[When developing additional modules](#) you can implement almost any function with a specific logic. For example, you can configure integration with an external system, control ELMA from external services and so on.

Interfaces of such custom modules can be modified to fit your company's branding. In addition, you can adjust the menus and add new buttons. For example, the ELMA Service Desk module might look like this (Fig. 24):

The screenshot displays the ELMA Service Desk interface for a ticket titled "ELMA 2018 - Authentication Error (created on 02/06 at 9:45)". The main content area shows a history of actions:

- Comment added** by Administrator on 9.2.2015 16:26:36: "Please provide a screenshot"
- Status changed** by Administrator on 9.2.2015 16:26:36: Name New → In progress
- Comment added** by Brown J. on 9.2.2015 16:36:26: "Screenshot in attachment" with an attached file "Screen\_2015\_12\_19\_16\_29\_52.png" (9.2.2015 16:29 Brown J.)

The right sidebar contains two sections:

- General Information:**
  - Project: ELMA
  - Type of request: Error
  - Status: In progress
  - System version: 3.9.7
- Customer information:**
  - Customer: ELMA
  - Author: Brown J.
  - Plan: Basic
  - Contract valid until: 21.01.2016
  - Support level: Second

Fig. 24 ELMA Service Desk module

## 2.7. Changing links in the Administration section

The main page of the Administration section features the **License Information** portlet (Fig. 25). It contains information about the current version of the system, number of active and used licenses, as well as links to different resources. You can change these links if your need.



Fig. 25 License Information Portlet

To add, edit or delete the links, use the **SystemInfoPortlet.cshtml** file in **..\<ELMA System Folder>\Web\Modules\EleWise.ELMA.BPM.Web.Common\Views\Home**.

Here is what the modified portlet can look like (Fig. 26):

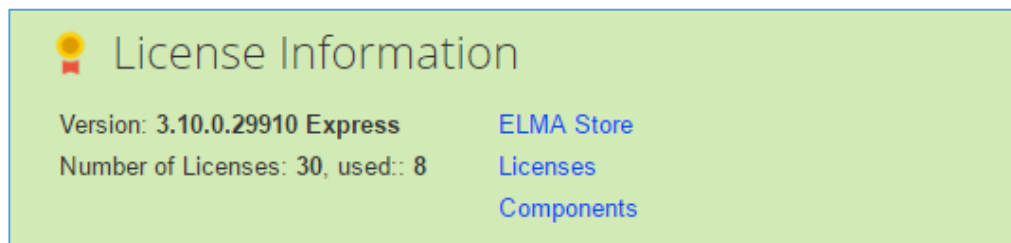



Fig. 26 License Information Portlet

## 2.8. Customizing the Help header

When you click on  in the top right corner of Web Application pages, the Help opens, looking as shown in Fig. 27:

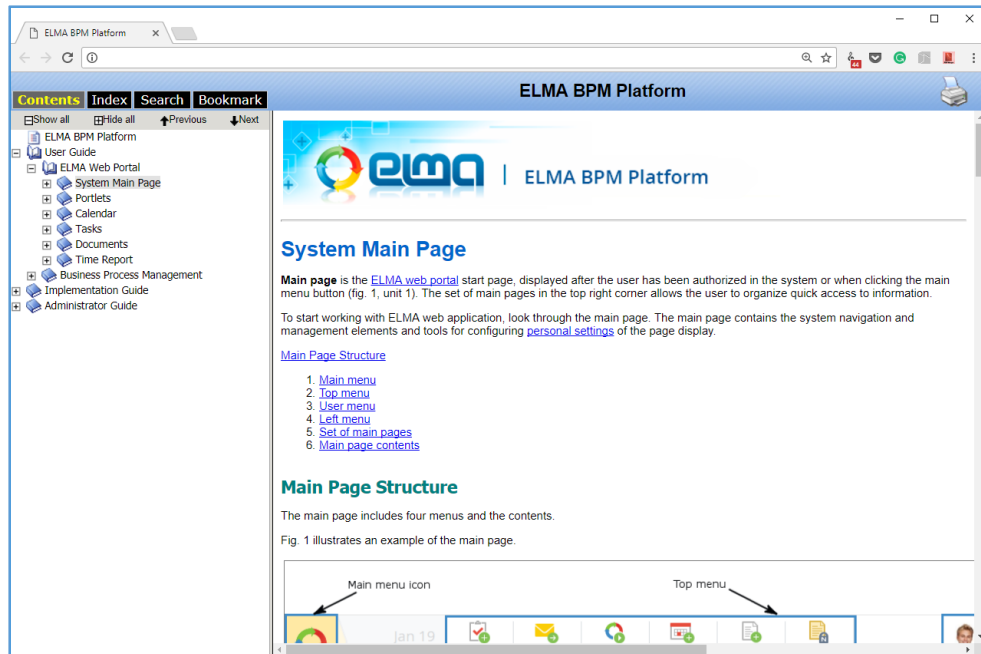


Fig. 27 ELMA BPM Platform Help

You can change the header. For that, change the image in **..\<ELMA System Folder>\Web\Modules\<component name>\Content\Help\ru-RU\WebHelp\scr\template**, where **<component name>** is the full name of the Help component that is shown in the browser address bar when you open the Help page.

For example, to change the logo in the header of the ELMA BPM Platform Help, go to **..\<ELMA System Folder>\Web\Modules\EleWise.ELMA.BPM.Web.Common\Content\Help\ru-RU\WebHelp\scr\template** and change **InsidePortal\_ELMA3.png**.

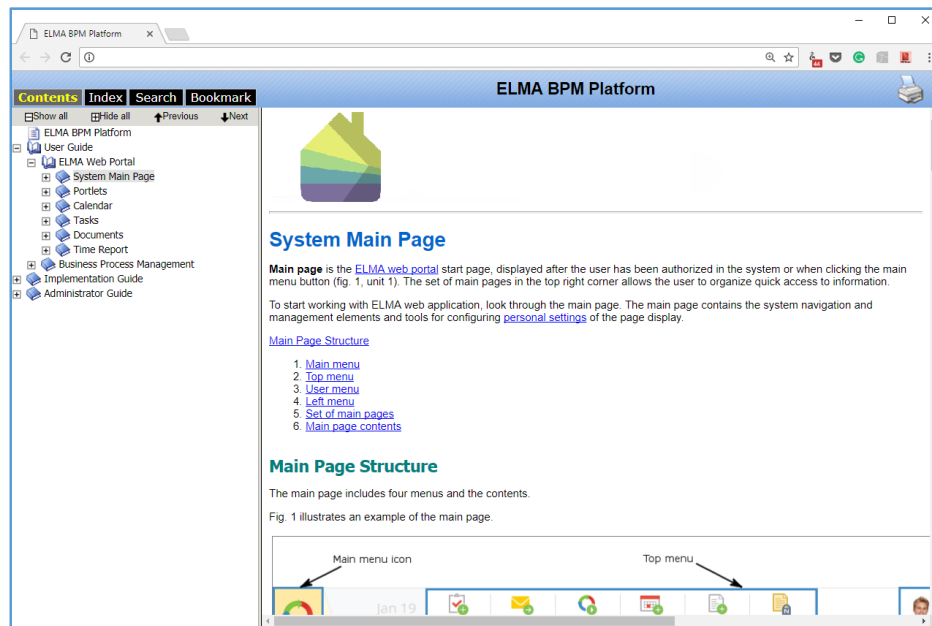


Fig. 28 ELMA BPM Platform help with changed header

## Chapter 3. Useful resources

This document describes how you can adapt the ELMA interface to your company's branding. To learn more about ELMA software, read the following manuals:

- [ELMA BPM Platform User Manual](#)
- [ELMA Web Portal User Manual](#)
- [ELMA ECM+ User Manual](#)
- [ELMA Projects+ User Manual](#)
- [ELMA KPI User Manual](#)

These manuals describe the main features of the system. For more details, read ELMA Help. It is included in the software package and is available online at <https://kb.elma-bpm.com/help>.

For developing your own modules and administrating the system, read the articles in **ELMA Knowledge Base** available at <https://kb.elma-bpm.com/help>.

ELMA is developing fast, and new components for specific tasks appear. You can download or purchase them in **ELMA Store**: <http://store.elma-bpm.com/>.

If you need assistance with the system or have a question regarding partnership with ELMA Company, contact us:

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<http://www.elma-bpm.com/about-us/>