



# QUICK START GUIDE

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## **GETTING STARTED**

Welcome to *Quick Start Guide*.

With these *Quick Start Guide* and online instructions which you'll find under the *Documentation* section of the user menu, you'll find platform easy to use. You can expect step-by-step instructions for account setup: from user login, explaining options on the main control panel, setting rights and notifications, etc.

Once you login into the platform, under the Documentation section of the user menu you will find all system functionalities explained in the details. (*Figure 1*).

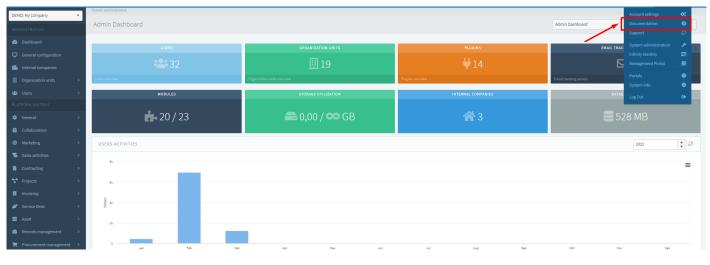


Figure 1: Dashboard – link on complete User's Guide

We're sure you'll find platform easy to use and beneficial in terms of saving time and energy.



## **1. USER LOGIN**

In order to be able to use platform, first you need to login into the system with your *username* and *password*. You can login in two ways:

- 1. via the user login form over the database
- 2. login with Azure AD (if you have 365 office account)

## **1.1. LOGIN VIA USER LOGIN FORM OVER THE BASE**

For login over the base, the system administrator should create a user account for you and you should sign up with your *username* and *password*. You can sign in into the application only with correct information. In the case of incorrect data information, a login error is displayed. (*Figure 2*).

<b>±</b>	miro.visic@info-nc	ovitas.com
۶		
Forgo	t password?	🔲 Remember me

Figure 2: User login over base

**Forgotten password** - If the user forgets the login information, on web application form he should choose the "Forgotten Password?" option.

When the user clicks on the link, a web form for reverting will be displayed.

The Remember Me option - used to remember user login.

If the user comes back to the login page at a certain time and the application has not expired, then the user is automatically redirected to the web application.



## **1.2.** LOGIN WITH AZURE AD

In order to login with Azure AD you should have an active 365 Office account.

You should enter the username and password.

You can sign in to the application only with correct information. In the case of incorrect data information, a login error is displayed.

By clicking Login with Azure AD, the user is redirected to the 365 Office account to log in.

After successful login the user is redirected to where the Active Directory user account must be linked to the account.

On every new login user should normally login via the Active Directory account.

If the user is already logged, he is automatically redirected to platform.

LOG IN	
Forgot password?	Remember me
	+D Log in
Login with Azure A	AD

#### Figure 3: User login with the Azure AD

## 2. MAIN CONTROL PANEL

After a successful login, the main control panel is displayed. In the right corner, there is a User Menu so you can access to Documentation, Support or System administration, on the left you can find a sidebar with all subsystems, in the header you can find a toolbar with notifications, chat, search etc., and on the background, there is Dashboard with available widgets.

### 2.1. USER MENU

First, we will explain the user menu in the right corner of the platform.



			N.
¶ ♠ ● Q	<ul> <li>Available</li> </ul>	John Smith 👘	
Dashboard	Account settir		
	Documentatio	on 🕜	Ε.
	Support	Q	
OF EMPLOYEES	System admir	nistration 🍾	
<u>, e</u>	Infinity Identi	ty 📼	
	Management	Portal 📑	
femployees	Portals	0	
	System info	0	
	Log Out	e	



In the user menu you can find options:

- My profile link on user activity stream and involved projects.
- Account settings link on user profile edit (change personal data, contacts or localization), change password, set notifications for enabled subsystems etc.
- **Documentation** link on complete User's Guide where you can find all answers about system functionalities.
- **Support** once you are signed in to the system, in the right corner of the system under the user menu you'll find Support where you can report bugs etc.
- **System administration** visible to users who are administrators. Only system administrator can create a user and determine which subsystems according to chosen permission schema he can see.
- Log out logged out option.

## **2.2. TOOLBAR**

Options available on the toolbar (Figure 5):

- 1. Toggle sidebar
- 2. Quick Create
- 3. Email tracking
- 4. Change language
- 5. Assigned tasks overview
- 6. Notifications overview



- 7. Chat
- 8. Search

DEMO: My Company	2. 3. Infinity Dashboard				4. Infinity 5. Wood 6. 7. 8. 9.	* \$*
INFINITY CORE						
Dashboard	NUMBER OF CONTACTS	NUMBER OF COMPANIES		NUMBER OF PRODUCTS/SERVICES	NUMBER OF ENPLOYEES	
Contacts management >	<b>-</b> 58	<b>H</b> 31		39	73	
Products/services >	Number of contacts	Number of companies		Number of products/services	Number of employees	
🔹 Employees >						_
PLATFORM SYSTEMS	10 RECENT CREATED COMPANIES			10 RECENT CREATED CONTACTS		
Collaboration >	NTL		<b>^</b>	Lauren Muller - Adobe Systems II		<b>^</b>
Marketing >	25.2.2022. 11:56 SUPPLIER		_	9.3.2022. 8:00 7892WHJUNVF789WHUI		
To Sales activities >						
Contracting >	A1 10.2.2022.14:36 • Croatia, Zagreb, 10000, Vrtni put, 1			Laurena Smith - VOLKSWAGEN SLOVAKIA 8.3.2022. 15:37		
Projects and programs	CLIENT SUPPLIER PARTNER			3476642EZ		
Invoices (AR/AP) >	Alpha M			Alex Levi - VOLKSWAGEN SLOVAKIA		
🗳 Service Desk >	10.2.2022. 14:26 + Croatia, Varazdin, 42000, Jurja Križanića, 25 CLIENT PARTNER SOFTWARE VENDOR SOFTWARE NANUFACTURER			8.3.2022. 15:36 RTE64L67		
Asset management >	Tokic			Alexandar Levi - VOLKSWAGEN SLOVAKIA		
ی 360° Tracking >	10.2.2022. 14:23 • Croatia, Sesvete, 10360, Ulica 144. brigade Hrvatske vojske, 1a			8.3.2022. 15:33		
Records management >	CLIENT SUPPLIER MANUFACTURER		•	23W89FHJU98T24W		•
F Procurement management	Organizat	ions by roles	=	Pr	oducts by type	=
to Human resources >						
Intranet portal						
Privacy Management >						
Corporate Governance >						
📾 Call center >						

Figure 5: Toolbar



## 2.3. SIDEBAR (AVAILABLE SUBSYSTEMS)

Available	subsystems	are	displayed	to	the	us	ser	(depending	on	user	permissions).
INFINITY CORE  Dashboard	NUMBER OF CONTACTS		NUMBER OF COMPANIES				NUMBER OF PRO	DUCTS/SERVICES	NUI	MBER OF EMPLOYEES	
Contacts management	> Land State	58	Number of companies	<b>H</b> 31				1/services	Num		<b>**</b> 73
Employees PLATFORM SYSTEMS	> 10 RECENT CREATED COMPANIE	ES					10 RECENT C	REATED CONTACTS			
Marketing	> NTL 25.2.2022. 11:56 SUPPLIER					Î	Lauren Muller 9.3.2022. 8:00 7892WHJUNW	r - Adobe Systems II			Â
Contracting Projects and programs	A1 10.2.2022. 14:36 * Croatia, Zagreb, 10 CLIENT SUPPLIER PARTNER	000, Vrtni put, 1					Laurena Smit 8.3.2022. 15:37 347004252	th - VOLKSWAGEN SLOVAKIA			
	Alpha M 10.2.2022 14:26 + Croatia, Varazdin, 4	2000, Jurja Križanića, 25						LKSWAGEN SLOVAKIA			
<ul> <li>Asset management</li> <li>360° Tracking</li> </ul>	CLIENT PARTNER SOFTWARE VEN	-					RTE64E67	vÍ - VOLKSWAGEN SLOVAKIA			
Records management     Procurement management	CLIENT SUPPLIER MANUFACTURE		Organizations by roles			•	23W89FHJU98		Products by t	ype	=
Human resources     Intranet portal	> >										
Privacy Management     Corporate Governance	>										
Call center	>										
<ul> <li>Organizational structure</li> <li>Company data</li> </ul>											

Figure 6: Available subsystems at the Sidebar

The user will be able to see subsystems only if the administrator set:

- work schedule on form for creating the user (if the work schedule is not set, the warning notification will appear after user login). In order for the administrator to choose work schedule, work schedule should previously be created on System administration → Sidebar: Users Management → Organization Units & Work types. The work schedule is obligatory field on the form for user create and it can be changed on user update or user profile in administration.
- <u>user rights/permissions</u> on form for creating the user (permission schema is chosen from the dropdown).
   System administration → User profile → Security → User permissions.

For creating organization units and work schedule read more in chapter 4.2. For setting user rights and notifications read more in chapter 3.



#### 2.3.1. TABLE OVERVIEW SETTINGS

In this section, we will explain options on the table overviews. The concept of all table overviews in the system is similar for all modules. *Table overview is accessed through the sidebar menu.* 

	Contracts overview											
DENO: Ny Company *	Contracts overview								0464		IS COMPLETED I IS EXPIRING	HAS EXPIRED
INFINITY CORE	Contracts over view	_					_		0	18	8 ⊘1 ⊉0	③ 16
Deshboard	+Add Export to Excel	liter					4.	N 11.3.2021.		E 11.3.2022.		52
Contects menagement	Petum ugovore -)	Droj ugovore E	Neziv	i τ 1	Pertner	Kategorija	Smjer I	Dodijeljeno : L	kupan iznos (sistemska)	Status	Status potpisivanja	
A Products/services	25.2.2022	BCA-37/2022	New contract with Rimac	4	Mark Smith	Business Cooperation Agreement	with supplier		26.760,50 €	IN PREPARATION	UNBIGNED	Profile
4 Employees >	14.2.2022.	BCA-30/2022	Macbook Air contract	н	91 - DEMO: Apple	Business Cooperation Agreement	with supplier		1.267,50 €	IN PREPARATION	POR SIGNATURE 9.	Edit
PLATFORM SYSTEMS	0 10.2.2022.	BCA-28/2022	Opening a new account contract	н	KONCAR-ELEKTROINDUSTRIJA D.D.	Standard contract	with supplier	Jakov Branic	748,65 €	ON EXAMINATION	BION DECLINED	Delete
Collaboration >	8.2.2022.	BCA-27/2022	DEMO: Contract with suppliers	8	PLWA HEWITSKA D.O.O.	Business Cooperation Agreement	with supplier	John Smith	259,90 €	IN PROGRESS	SIGNED	-
Marketing >	8.2.2022.	BCA-26/2022	Create new web design	8	69 - Info Novitas Ltd.	Business Cooperation Agreement	with supplier	Jakov Branic	784,23 €	IN PROGRESS		-
-	8.2.2022.	BCA-25/2022	Closing account contract	8	PZC WARAZOIN D.D.	No category	with supplier	Laura Smith	332,77 €	IN PROGRESS	BIONEO	-
To Sales activities >	0 1.2.2022	BCA-24/2022	New losse contract	н	86 - KING ICT D.O.O.	Business Cooperation Agreement	with buyer/client	John Smith	1.200,22 €	ON EXAMINATION	BION DECLINED	-
Contracting ~	0 10.2.2022	BCA-23/2022	Notebook computer buying	н	91 - DDAO: Apple	Business Cooperation Agreement	with supplier	John Smith	1.912,85 €	IN PROGRESS		-
Deshboerd	0 10.2.2022.	BCA-22/2022	Web design	н	69 - Info Novitas Ltd.	No category	with supplier	Greg Seto	2.288,25 €	ON EXAMINATION		-
Freme contracts	0 15.2.2022.	BCA-21/2022	Computers and computer equipment	8	91 - DDMO: Apple	Business Cooperation Agreement	with buyer/dient	Awa Wade	46.730,25 €	IN PROGRESS	UNSKINED	-
Contracts V	<b>0</b> 8.2.2022	BCA-20/2022	Mobile telecommunications services	8	HRWATSKI TELENOM	Standard contract	with supplier	Ramiro Mason	3.666,22 €	ON EXAMINATION	UNDIGNED	-
New contract Contracts overview	8.2.2022.	BCA-19/2022	IT consulting contract	н	69 - Info Novitas Ltd.	Business Cooperation Agreement	with supplier	Betty Montes	79.842,75 €	ON EXAMINATION	UNSIGNED	-
Contract templates	8.2.2022.	BCA-18/2022	Interior design contract		67 - APIS IT D.O.O.	Standard contract	with supplier	Noelle Williams	2.186,55 €	IN PROGRESS	SIGNED	-
Purchase orders >	8.2.2022.	BCA-17/2022	Additional accident insurance	B	PZC VARAZDIN D.D.	Business Cooperation Agreement	with supplier	Danielle Gough	15.407,55 €	IN PREPARATION	UNSIGNED	-
Authorizations >	8.2.2022.	BCA-16/2022	New app development	8	86 - KING ICT D.O.O.	Business Cooperation Agreement	with supplier	Andrew Alex	106.361,25 €	ON EXAMINATION	FOR SIGNATURE	-
Signings	8.2.2022.	BCA-15/2022	Insurance	8	77 - PODRAVIKA d.d.	Business Cooperation Agreement	with supplier	Alvin Holman	9.831,00 €	IN PREPARATION	FOR DONATURE	-
Hiererchy Reports	8.2.2022	BCA-13/2022	Implementation of new web design	н	73 - IBM Hrvatska dusis.	Business Cooperation Agreement	with supplier	Caleb Seidel	1.121,00 €	ON EXAMINATION	UNDIGNED	-
	8.2.2022.	BCA-12/2022	Financial bank contract	H	81 - LIDI, HRWITSKA D.O.O.K.D.	Business Cooperation Agreement	with supplier	Albert Johnson	1.118,70 €	DECLINED	UNSIGNED	-
Projects and programs	8.2.2022.	BCA-11/2022	IT Services	н	81 - LIDL HRWITSKA D.O.C.K.D.	Business Cooperation Agreement	with supplier	Maria Hernandez	1,429,45 €	IN PREPARATION	UNSIGNED	-
Involces (AR(AP) >	8.2.2022.	BCA-10/2022	Expansion with a new model	8	91 - ODMO: Apple	Business Cooperation Agreement	with supplier	John Smith	3.051,00 €	IN PROGRESS	FOR SIGNATURE	-
Ø Service Desk >	8.2.2022	BCA-9/2022	Heating implementation contract	8	83 - HEP D.O.O.	Business Cooperation Agreement	with supplier	Alvin Holman	149,21 €	IN PREPARATION	BIONED	-
Asset menagement	8.2.2022.	BCA-8/2022	Small office supplies	н	77 - PODRAWKA d.d.	Standard contract	with supplier	Danielle Gough	41,81 €	COMPLETED	RIGNED	-
الله 360° Trecking >	7.2.2022.	BCA-7/2022	Create a new version	н	91 - DBMD: Apple	Business Cooperation Agreement	with supplier	Dvira Baker	4.271,40 €	IN PREPARATION	FOR SISNATURE	-
Records management >	0 7.2.2022	BCA-6/2022	Line installation	н	HRWATSH TELENEM	Business Cooperation Agreement	with supplier	Archie Frost	2.641,36 €	GECLINED	UNSIGNED	-
-	7.2.2022.	BCA-5/2022	Car insurance	H	71 - Allanz	Business Cooperation Agreement	with supplier	Alvin Holman		IN PREPARATION	UNSIGNED	-
Procurement management >									363.321,38 kn			5. 7. 8.
42b Humen resources >	8 4 <b>3</b> 2 P P 25	<ul> <li>items per page</li> </ul>									1 - 25 of 29 item	6 8 8 0
Intrariet portal												
Privacy Hanagement >									Total without tax			305.330,30 kn
Corporate Governance >									Total tax			60.634,55 kn
Callcenter >									Total with tax			364.020,09 kn

#### Figure 7: Table overview - settings

The main options on the table overview you shod know are:

- 1. Add option link on creating a new entity (eg new contract).
- 2. Export to excel option the user can download a table overview in excel format.
- 3. Column filter selecting the filter option it opens the filtering line.
- 4. **Date filter** filter is set from the first day of the month to today. In case the filter is turned off, all items will show in the table.
- 5. **Items per page** change the number of items per page.
- 6. **Refresh** table refresh.
- 7. Grid filter reset reset filtering.
- 8. Save table settings (closed lock icon) save newly added columns, new column sort etc.
- 9. Delete all table settings (open lock icon) delete all table changes.
- 10. Context menu available options: profile, edit, delete item.
- 11. Sorting columns for sorting columns you should drag and drop columns to the desired place in the table.

#### For saving column layout you must select the lock icon at the bottom of the table.

#### **2.3.2. ENTITY PROFILE**

In the previous section we explained table overview settings. Through the table overview, user comes on entity profile. Now we will explain profile structure.



DENO: Ny Company *				
	DEMO: Contract with suppliers			In progress 🗠 Edit Delete 🌣 🗸
	GENERAL ITEMS () SIGNING () PARTIES () HIERARCHY RELATED	INVOICES (1) SERVICE ORDERS (1) LINKED ASSETS (1) PR	DCUREMENT PROPOSALS O SUPPORT O PROCUREMENT PLAN ITEMS O DOCUMENT LINKS O SD ISSUES O	
	BASIC INFORMATION	ODVERAL DETAILS CONTRACT DESCRIPTION DATES CONTRACT DESCUTION		
	Code: 8C4-27/2022			
	Business year: 2022	General		
	Contract Category: Business Cooperation Agreement	Code:	804-27/2022	
	Status: IN PROGRESS	Contract date:	8.2.2022	
	Signeture status: \$10xE0	Name:	DEMO: Contract with suppliers	
	Type: New contract	Business year:	2022	
	Assigned to: 🔓 John Smith	Contract type:	New contract	
	Contract date: 8.2.2022.	Category:	Business Cooperation Agreement	
	Termination: 14.2.2022.		with supplier	
	Watchers: (1) Stop watching		DEMO: My Company	
	Created in OU: My Company · Zagreb		🕹 John Smith	
	Dete created: 8.2.2022. 15:25	External code:		
	Created by: 👗 John Smith		Ny Company - Zagreb	
	Last modified by:	Category description:		
	External, ref: -	Price list:		
	Edemal Rez -		IN FROMESS	
		Signature status:		
	REALIZATION	Currency:	Euro S - Standard rata (Basa Amount + Tax)	
			5 - Standard Heat (base Amount + Hea)	
	Spent (without teo) 230,00 €	Partner		
	Spert (with tex)	Partner type:	E DEBANIZATION	
	259,90 C	Company:	PLNA HRWITSKA D.O.O.	
	Spent (without tax) (%)			
	80%	Links		Add link
	Spent (with tax) (%)	Created from		
	1006	Signing a contract	User event	
		22/00004 (PLNA HRNATSKA 0.0.0.)	Inbound invoices	IN PROCESSING
		Relates to		
		OF-2/2022 - Order for new office supplies	Contract proposal	m POCCAPES N
		Signing a contract	Uber Taak	CARATED
		Description		
		A legal agreement between a business and a supplier.		
		Financial info		Transactional (Q) Report (Q) System (Q)
		Amount (C):	230.09	

Figure 8: Entity profile

The left part of the web form contains basic information about the entity.

The right part of the web form consists of tabs characteristic for a particular profile.

In the header there are basic options like an update, delete or status change + other options characteristic for a particular profile.

**Start watching option** - when enabling notifications for a module in system administration, you also need to click on start watching option on entity profile so you could start receiving notification for individual modules.

For setting notifications read more in chapter 3.2.

## **3.** ADMINISTRATION - USER RIGHTS AND NOTIFICATIONS

In order to edit user Rights and Notifications administrator should open the User menu in the right corner of the system and go to user profile like is described below:

- 1. User menu  $\rightarrow$  System administration  $\rightarrow$  double click on the user name on the widget Last logged users, or
- open internal users overview in the sidebar and choose Profile option from the context menu on the Internal user overview.
   System administration → Users → Internal users overview → Profile.



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							¥
	OGGED USERS User			Last lo	ogin		ł
AST L				Last lo prije 2	ogin 1 minuta		ł
.AST L	User				1 minuta		;
LAST L	User 🌡 John Smith			prije 2	1 minuta sata		ł
LAST L	User 🌡 John Smith 💽 Ruby Osborne			prije 2 prije 4	1 minuta sata sati		1
LAST L	User a John Smith Cuby Osborne Laura Smith			prije 2 prije 4 prije 5	1 minuta sata sati an		6
LAST L	User John Smith W Ruby Osborne Laura Smith M Danielle Gough			prije 2 prije 4 prije 5 prije d	1 minuta sata sati an dana		
	User John Smith Ruby Osborne Laura Smith Danielle Gough Phillip Vuong			prije 2 prije 4 prije 5 prije d prije 3	1 minuta sata sati an dana dana		\$
	User John Smith User User User Nuby Osborne User Laura Smith Danielle Gough On Danielle Gough On Phillip Vuong Louis Lopez			prije 2 prije 4 prije 5 prije d prije 3 prije 8 prije 8	1 minuta sata sati an dana dana		1
LAST L , , , , , , , , , , , , ,	User John Smith User Smith User Smith User Smith User Smith User Smith Osborne			prije 2 prije 4 prije 5 prije 6 prije 3 prije 8 prije 8 prije 1	1 minuta sata sati dana dana dana		\$

Figure 9: Guide to user profile



## **3.1. USER PERMISSIONS**

If you have followed the previous steps, you are on the user profile. To update user rights, you need to go to the tab **Security.** 

		Users overview / User: D: Theodora Kellet								
DEMO: My Company	× .	A								
ADMINISTRATION		D: Theodora Kellet							Edit Actions V Reset password	
🙆 Dashboard			_							
General configuration		GENERAL MY ACTIVITIES JOB POSITIONS	S	ECURITY NOTIFICATIONS WORKLOG	S CALL CENTER	EMAIL TRACKING	DASHBOARDS	OTHER SETTINGS	GDPR - DATA SUBJECT 🗸 🗸	
🛍 Internal companies		User permissions	>							
Organization units	>	Platform Systems	>	User permissions						
🚢 Users	*	Roles	>		Use custom settings					
New user		Multi org	>	Permission scheme:	Choose					
Users overview				User logins						
PLATFORM SYSTEMS					Infinity ECM					
🅸 General	>				Service Desk Portal					
🛱 Collaboration	>									
Marketing	>			Save						
To Sales activities	>									

#### Figure 10: Security tab on user profile in administration

On the Security tab, the administration can:

- Change user password
- Update user permissions when updating permissions you have two options:
  - If the checkbox Use custom settings is not selected, then you can choose Permission schema from the dropdown. (*Figure 11*). Of course, in order to choose permission schema, you should previously create it on Template overview (Permission schema). Creating permission schema is done over System administration → Sidebar: Security → Permission schemes → Templates overview → Add.
  - 2. User custom settings checkbox is selected (select & save) two new tabs will appear: Platform systems and Roles. Now you can add platforms and edit roles (*Figure 12 & 13*).

#### **OPTION 1:** checkbox **Use custom settings** is not selected (*Figure 11*):

If the checkbox Use custom settings is not selected, then user from Permission scheme dropdown chooses scheme which is previously created on Template overview (permission schemes). System administration  $\rightarrow$  Security  $\rightarrow$  Permission scheme  $\rightarrow$  Templates overview.



😌 Quick Create 🗸 🖉		🖶 Hrvatski 📢 🌲 🗩 🔍 🔸 Available 🛛 John Smith 🎧 😑
Users overview / User: D: Theodora Kellet		
D: Theodora Kellet		Edit Actions 🛩 Reset password
GENERAL MY ACTIVITIES JOB POSITI	ONS SECURITY NOTIFICATIONS WORKLOGS CALL CENTER EMAIL TRACKING DASHBOARD	OTHER SETTINGS GDPR - DATA SUBJECT 👻
	>	
User permissions	User permissions	
Platform Systems	· · · · · · · · · · · · · · · · · · ·	
Roles	Ouse custom settings     If use custom settings     If use custom setting is no     Permission scheme: Choose you can choosepermission	
Multi org	>	
	User logins	
	🖉 Infinity ECM	
	🖉 Service Desk Portal	
	See	

Figure 11: Choose Permission schema from the dropdown

#### **OPTION 2: User custom settings** checkbox is selected (*Figure 12*):

User custom settings checkbox is selected (select & save checkbox) and two new tabs are displayed.

If the administrator on User permissions choose the checkbox **Use custom settings**, then two new tabs will be displayed: Platform systems and Roles. In these tabs, he can choose which platforms and roles he wants to see.

🗣 Quick Create 🗸 🦉	🕀 Hrvatski 📢 🌲 🗭 🔍 🔹 Available Jo	əhn Smith 👫 🛛 🖃
Users overview / User: D: Theodors Kellet		
D: Theodora Kellet	Edit Actions v	Reset password
GENERAL MY ACTIVITIES JOB POSITIONS	CURITY NOTIFICATIONS WORKLOGS CALL CENTER EMAIL TRACKING DASHBOARDS OTHER SETTINGS GDPR - DATA SUBJECT	~
User permissions > Platform Systems > Roles > Multi org >	User permissions	
	C Infinity ECM Service Desk Portal	

Figure 12: Checkbox Use custom settings is selected

#### Platform systems tab:

• enable all modules that you want to see (system administrator enables for other employees) and then in tab Roles you select all wanted roles for enabled modules.



🕒 Quick Create 🕶 🧧		🕮 Hrvatski 📢 🌲 🗩 🔍 🔹 Available John Smith 🏠
Users overview / User: D: Theodora Kellet		
D: Theodora Kellet		Edit Actions • Reset password
GENERAL MY ACTIVITIES JOB POSITIONS	Y NOTIFICATIONS WORKLOGS CALL CENTER EMAIL TRA	ACKING DASHBOARDS OTHER SETTINGS GDPR - DATA SUBJECT
User permissions >	abled modules	☐ Check all
Platform Systems		
Roles	Infinity Core Privacy Management	
Multi org	Collaboration	
	Marketing	
	Sales activities	
	Contracts	
	Projects	
	Invoices	
	Service desk	
	Call center	
	360 views	
	Records management Asset management	
	Intranet portal	
	Human resources	
	Corporate Governance	
	Email tracking	
	File Management	

Figure 13: Choose modules on Platform system tab



#### Roles tab (Figure 14):

- when choosing roles (creating, updating, deleting etc.), you can also choose Row level security (RLS) for each overview.
- in this way each employee will see modules which he supposed to see and have roles in line with his position.
- also, row security level (RLS) enables that you see items: only yours, in the same org. unit, subordinated or all items.

**IMPORT OPTION**: through this option you can also import permission schema or role group. For import, previously you need to create permission schema & role group. Read more in chapters 3.1.1. and 3.1.2.

Quick Create 🗸 🧕				🖶 Hrvatski 📢 🌲	🗩 🔍 🔹 Available John Smith 👫
s overview / User: D: Theodora Kellet					
D: Theodora Kellet					Edit Actions ¥ Reset passwo
GENERAL MY ACTIVITIES JOB POSITI	ONS SECURITY NOTIFICATIONS	WORKLOGS CALL CENTER	EMAIL TRACKING DASHBO	DARDS OTHER SETTINGS	GDPR - DATA SUBJECT
Jser permissions	> Roles				Import
Platform Systems	>				
loles	> Infinity	CONTACTS			Select all > Deselect all >
Aulti org	Privacy Management     Collaboration     Sales activities	✓ Creating	Updating	✓ Deleting	
	Sales activities Marketing				
	Contracts Projects	PRODUCTS/SERVIC	ES		Select all
	Invoices Service desk	Creating	Updating	✓ Deleting	
	Call center 360 views Records management Asset management	COMPANIES OVERV	(IEW		Select all <sup>v</sup> Deselect all <sup>v</sup>
	Intranet portal Human resources	✓ Creating	Vpdating	Deleting	
	Corporate Governance Email tracking				
	Procurement manageme	nt PRICE LISTS			Select all Deselect all
	External portals Administration	Creating	Updating	✓ Deleting	
		GENERAL - WIDGET	rs		Select all* Deselect all*
		Secrecy level:	Top secret 💌		

#### Figure 14: Choose roles for enabled modules



#### **3.1.1. CREATING PERMISSION SCHEMA**

We have already mentioned that for choosing permission schema on the user profile, administrator previously needs to create permission schema over System administration  $\rightarrow$  Sidebar: Security  $\rightarrow$  Permission schemes  $\rightarrow$  Templates overview  $\rightarrow$  Add.

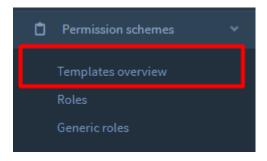


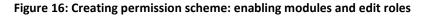
Figure 15: Administration sidebar: permission schema overview

Steps on creating permission scheme:

- 1. Choose an Add option to create permission scheme
- 2. choose Enable modules option from the context menu and add modules on a created scheme
- 3. Edit roles on enabled modules

When you are done, you can choose the permission scheme on user profile in administration or on form for creating a user. Eg: if you create a scheme for module Marketing than you can create a role group and join the created module. *About creating a role group read more in chapter 3.1.2.* 

🗢 Quick Create 🗸 🧕					Hrva	rtski	5	•	٩	• Available	John	Smith 🐐	) =
Permission schema overview													
Permission schema overview													
+Add Tilter													
Name 1.	Description	Defa	ult	: c	Created by	Da	ite crea	ted					
Administrator			Ø	S)	System Administrator	21.	2.2020.	15:50				dit	
H I H Z5 V items per page										2.	<u> </u>	nable moi	dules
										3.	E	dit role	
												lone	
											C	lelete	



#### **3.1.2. CREATING ROLE GROUP**

Also, for choosing role group on user profile administrator previously need to create role group over System administration  $\rightarrow$  Sidebar: Security  $\rightarrow$  Permission schemes  $\rightarrow$  Roles  $\rightarrow$  Add.

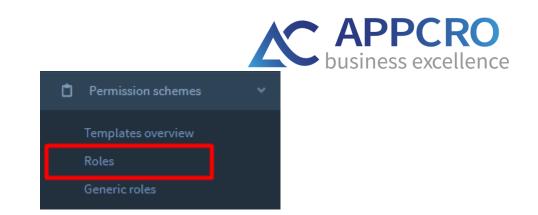


Figure 17: Administration sidebar: creating role group

After creating a role group, you can manage roles. When you are done, you can choose a role on user profile in administration for chosen permission scheme.

DEMO: My Company 🔻	Roles							
ADMINISTRATION  B Dashboard	+ Add T Filter							
General configuration	Name : Descri	iption :	Date created	Created by	System role	Last modified by	Module	1
🛍 Internal companies	IT Administrator		9.3.2022. 10:34	Laura Smith			Infinity Core	Edit
Organization units		per page					(	Manage role
🛎 Users 🗸 🗸								Delete
New user								

Figure 18: Creating and managing role group



## **3.2. USER NOTIFICATIONS**

Two important steps you need to do if you want to receive notifications:

1. Set notifications for wanted module (choose Intern/Email)

DEMO: My Company 🔻	Osers Overview / Oser, D. Theodora Mellec			
ADMINISTRATION	D: Theodora Kellet			Edit Actions ¥ Reset password
🔁 Dashboard	GA 1072009			
General configuration	GENERAL MY ACTIVITIES	JOB POSITIONS SECURITY NOTIFICATIONS WORKLOGS CALL CENTER EMAIL TRACKING	DASHBOARDS OTHER SETTINGS	GDPR - DATA SUBJECT 💙
🕮 Internal companies				
🖪 Organization units >	Notifications			Import notification group
🛎 Users 🗸 🗸	▲ Infinity	Infinity Core	Interna	Email
New user	Infinity Core Privacy Management	Contacts		
Users overview	Collaboration	Contact deleted		
PLATFORM SYSTEMS	Marketing Sales activities	Contact edited		
	Contracts	Products/services		
🕸 General >	Projects Invoices	Product deleted		
🗟 Collaboration >	Service desk	Product edited		
Marketing >	Records management	Companies overview		
-	Asset management Intranet portal	Company deleted		
To Sales activities >	Human resources	Company edited		
Contracting >	Corporate Governance Procurement management	Employees		
TProjects >	Procurement management	Delete employee		
Invoicing >		Edit employee		
🛷 Service Desk >				
■ Asset >		Save Cancel		
🚔 Records management >				

Figure 19: Enabling notifications (internal/email) for modules

GENERAL	COMPAN	IES OVERVIEW 3	CONTACTS 1	SUPPLIERS 3	ASSET 1	GALLERY	PRICE LIST ITE	MS 1	INTER
BASIC INFOR	RMATION			GENERAL DETAILS	DMS ATTACHMENTS	COLLABORATION	ACTIVITY STREAM	TASKS	EVENTS
Inte	ernal code:	MBOOK1		General					
Product/se	ervice type:	Product							
Responsil	ble person:	🐌 John Smith			Internal	code: MBOOK1			
	Unit:	piece/service			N	lame: DEMO: Ma	cBook		
_	Enabled:	Yes			Nomen. r	name: HOP - Hou	isehold products		
	Watchers:	O Start watching			Product	type: Product			
Da	te created:	30.1.2022. 18:59			Internal com	pany: DEMO: My	Company		
(	Created by:	🐌 John Smith			Categ	ories: OFFICE E	QUIPMENT HOUSEH	OLD PRODU	стя
Las	t modified:	11.2.2022. 10:27			Measure	unit: piece/serv	rice		
Last m	odified by:	指 John Smith			OU o	wner: 1 - My Con	npany - Zagreb		
Ex	ternal. ref.:	-			Manufac	turer: DEMO: Ap	ple		
					Product	code: MBOOK			
					External	code: MBOOK			
					Responsible pe	erson: 🛛 🌡 John S	Smith		
					Asset	type: Equipmen	t		

2. On entity profile in the user part, auser should click on option Start watching.

Figure 20: Start watching option on entity profile



There are two ways of setting up notifications:

- 1. over Account settings (user access). User menu  $\rightarrow$  Account settings  $\rightarrow$  Notifications (for all employees)
- over System administration on the user profile (for administrators only). User menu → System administration → go to user profile over widget or over Internal user overview in the administrator sidebar → Profile → Notifications.

Unlike the users, the administrator has an additional option to configure the notification – the option *Import notification group*. (*Figure 19*). For notification group import user should previously create notification groups.

#### For creating notification group read more in chapter 3.2.1.

Once the user set the notifications and clicks on the option start watching, the notifications will start arriving.

		English	4		٩	<ul> <li>Ava</li> </ul>		John Smit	h 👔
	NOTIF	ICATIONS	Settings						
	≔	Laura Smith updated an issue: Server is down			+ Cr	eate 💙	Clone	Edit	Dele
ти	≔	Laura Smith updated an issue: Server is down		4S 🖪		VERSIC	NS 2		
NT	≔	Laura Smith updated an issue: Server is down							«
	≣	Danielle Gough updated an issu Paid vacation not paid off	e: 3 days ago						
		New al	- f l notification						



## **3.2.1. CREATING NOTIFICATION SCHEMES**

We have already mentioned that for choosing notification schema on form for user create you previously need to create notification schema over System administration  $\rightarrow$  Sidebar: Security  $\rightarrow$  Permission schemes  $\rightarrow$  Templates overview  $\rightarrow$  Add.

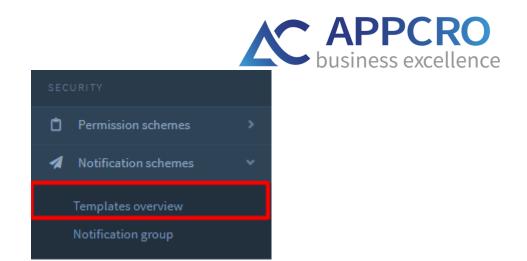
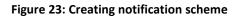


Figure 22: Administration sidebar: creating permission scheme

After creating notification scheme you can choose the notification scheme **on form for creating user.** 

Description	Enabled	Default :	Order level	Created by	- E -
feeting for the implementation plan	0		1	John Smith	
				1 - 1	of Edit
					Clone
					Delete
					eting for the implementation plan



## **3.2.2. CREATING NOTIFICATION GROUPS**

Also, for choosing notification on user profile you previously need to create role group over System administration  $\rightarrow$ 

Sidebar: Security  $\rightarrow$  Notification schemes  $\rightarrow$  Notification group  $\rightarrow$  Add.

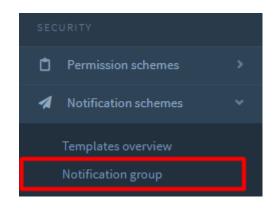


Figure 24: Administration sidebar: creating notification group

After creating notification group you can manage notifications. When you are done, you can choose notification group for specific module on user profile in administration. Eg: if notification group is created for module Marketing, when administrator is on user profile on Notifications situated on module Marketing – from Import option he can choose previously created notification group.

					business	excellenc
🔁 Quick Create 🗸 🛛 🔮				+ Er	glish 📢 🌲 🗩 🔍 🖲 Available	John Smith 👫 🛛 😑
Notification groups						
Notification groups						
+ Add T Filter						
Name	: Description	: Module	: Date created	Created by	Last modified by	· · · · · · · · · · · · · · · · · · ·
Meeting	Meeting	Marketing	11.3.2022. 12:42	John Smith		Edit
H 4 1 P H 2	15 🔻 items per page					1 - 1 o Manage
						Delete

Figure 25: Creating and managing notification group

## 4. ADMINISTRATION SIDEBAR

The administration is available only to the users who are administrators. In administration sidebar you can create code books and set other settings like creating organization units and internal users, create necessary plugins, adding email boxes, edit permissions and notification schemes, etc.

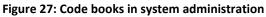


#### Figure 26: System administration

## **4.1. CREATING CODE BOOKS**

Code books define fields that appear in the user area in the drop-down menu. Code books are divided by subsystems. You can set code books specifically for each of the module. For example, if creating a contract in the user part and it opens empty drop-down, administrator probably needs to create some codebooks. Administrator should go to **System administration**  $\rightarrow$  **module Contracts**  $\rightarrow$  **Code books**  $\rightarrow$  **Add. In order for the user to see code books in user part, code books need to be enabled on form for creating** (*Figure 27*).





#### 4.2. CREATING ORGANIZATIONAL UNITS AND WORK TYPES (BASIS FOR USER CREATE)

One of the first steps in the system is creating users. In order to create a user, administrator needs to create organization units and work types so he could choose these two fields on user create.



#### Figure 28: Organization units in system administration

- Organization unit create is done over User menu → System administration → Users management in the sidebar → Organization units → Overview → Add.
- Work type create is done over User menu → System administration → Users management in the sidebar → Work types → Add.



## **4.3. CREATING INTERNAL USER**

Now that organization units and work types are created, you can create a user. New internal user creates is done over User menu  $\rightarrow$  System administration  $\rightarrow$  Users  $\rightarrow$  Internal users overview  $\rightarrow$  Add.

For select permission and notification scheme on form for creating read more in chapter 3.1.1. & 3.2.1.

For all fields description on form for user create visit complete User's Guide under the Documentation section.





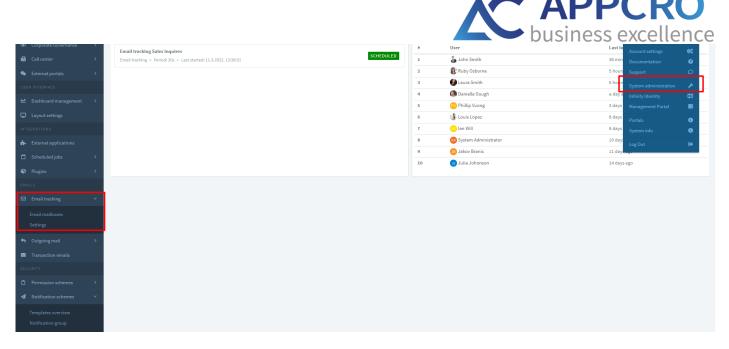
## 4.4. DASHBOARD MANAGEMENT

Basic dashboards for each module are initially set. Creating new dashboards and adding widgets is done over User menu  $\rightarrow$  Sidebar: User interface  $\rightarrow$  Dashboard Management  $\rightarrow$  Dashboard overview  $\rightarrow$  Add.

For adding widgets on created Dashboard, the administrator should choose option **Profile** in the context menu on the **Dashboard overview**.

## **4.5. EMAIL MAILBOXES**

Adding email mailboxes is done over User menu  $\rightarrow$  Sidebar: Mails  $\rightarrow$  Email tracking  $\rightarrow$  Settings $\rightarrow$ Add.



#### Figure 30: Email mailboxes in system administration

If created email tracking server is enabled, the scheduled task will be created. When email tracking server is created, tracking does not start automatically, it is necessary to start tracking on Administrator sidebar: Mails  $\rightarrow$  Scheduled jobs.

#### You can read more about managing the scheduled jobs in chapter 4.7. Scheduled jobs.

If email tracking server is not enabled on form for creating, the scheduled task won't be created. You need to create a manually scheduled new task **on Scheduled jobs** and enter the email tracking server ID. ID you can find on email tracking server profile.

After the successful creation of the scheduled task, it is necessary to **start the task**. Platform will record a new task on a web service and run periodic mailbox tracking.



#### **DEFINING AGENTS ON EMAIL TRACKING PROFILE**

In order for users to see an email tracking server in the user account, the administrator needs to select a list of users who can see the email tracking server in the email tracking server profile. This is done through the tab AGENTS on the Email tracking server profile.

DEMO: My Company 🔻	Email tracking servers / Email server: Sales Inquires						
ADMINISTRATION	Sales Inquires					Edit	Delete
	GENERAL AGENTS EMAIL TEMPLATI	S TRACKING TOKEN VIRTUAL SERVICE I	DESKS				
General configuration	+ Add TFilter						
🛍 Internal companies	First name	Last name	Email	Organization unit	Date created	Created by	
	D: Theodora	Kellet	theodorakeliet@demo2.com	DEMO: My Company - Switzerland	21.2.2022. 14:40	Jakov Branic	
	Phillip	Vuong	phillipvuong@demo2.com	DEMO: My Company - Switzerland	18.2.2022. 14:29	John Smith	
	Diane	Mayers	dianemayers@demo2.com	Marketing	7.3.2022. 11:03	Danielle Gough	
🕸 General >	Laura	Smith	laura.smith@info-novitas.com	My Company - London	18.2.2022. 14:29	John Smith	
	Jakov	Branic	jakov.branic@demo2.com	Human resources	18.2.2022. 14:29	John Smith	•••
Collaboration >	Helga	Mayer	helga.mayer@demo2.com	Marketing	18.2.2022. 14:29	John Smith	
	John	Smith	john.smith@demo2.com	My Company - Zagreb	18.2.2022. 14:29	John Smith	
To Sales activities >	H I H Z T items per page					1 - 7 of 7 ite	ems 🔿
Contracting >							



#### SETTINGS FOR MONITORING ON EMAIL TRACKING PROFILE

🔁 Quick Create 🗸	<u>9</u>					🌐 English 📢 🌲	<b>• Q</b>	• Available	John Smith	<b>)</b> =
Email tracking servers /	Email server: Sales	Inquires								
Sales Inquires		_							Edit	Delete
GENERAL	AGENTS	EMAIL TEMPLATES	TRACKING TOKEN	VIRTUAL SERVICE DESKS						

On the email tracking server profile, the administrator can define email tracking token settings. Tokens are generated for incoming and outgoing emails and added to the email message subject, which significantly improves the mail pairing process.

In each email token, unless otherwise is defined, to the end of the token is added a counter to make each token unique and avoid duplicates (*Figure 32*).

😌 Quick Create 👻 🧕			🕀 English 📢 🌲 🕽	🗩 🔍 🔍 Available	y John Smith 🥼 😑
Email tracking servers / Email server: Sales Inquires					
Sales Inquires					Edit Delete
GENERAL AGENTS EMAIL	TEMPLATES TRACKING TOKEN VIRTUAL SERVICE DESKS				
	2 Use tracking token	Supported patterns			
Prefix:	SALES	{year4}	Current year with 4 digits		
Counter base value:	1,00	{year2}	Current year with 2 digits		
Counter min. digits:	5,00	{month} {day}	Current month in year (2 digits) Current day in month		
Pattern:		{dayYear} {userid}	Current day in year Infinity User ID		
Sample:	SALES00001	{employeeCode} {counter}	Employee code of sender Customize position of counter		
	Save				

Figure 32: Configure tracking token



Field Name	Description
Use tracking token	If this option is enabled, the web service will use the pairing of the email message through the tracking token.
Prefix	The prefix that will be added to the generated token It is desirable to use large letters without spaces.
Counter base value	Initial counter value (eg if you don't want the counter start from 0)
Counter min. digits	The number of leading zeroes for the counter.
Pattern	Counter template. On the right are supported templates that can be added to generate a counter template.

#### Table 1: Configure tracking token

Once the email tracking token is enabled, the web service will start generating badges for incoming and outgoing mail.

# How to create labels, set option Auto recognize contact, or create user email signature check in complete User's Guide on Documentation section.

Once the mailbox is created, you can find it in the user part in Toolbar.

🗢 Quick Create 🗸 🦉				🕀 English 📢 🌲	• ٩	• Available	John Smith 휾 🛛 🚍
	emo2@info-novitas.hr)						
Sales Inquires							Edit Delete
GENERAL AGENTS EMAIL	TEMPLATES TRACKING TOKE	VIRTUAL SERVICE DESKS					
	✓ Use tracking token						
Prefix:	SALES		Supported patterns	Current year with 4 digits			
Counter base value:	1,00	\$	{year2}	Current year with 2 digits			
Counter min. digits:	5,00	\$	{month} {day}	Current month in year (2 digits) Current day in month			
Pattern:			{dayYear} {userid}	Current day in year Infinity User ID			
Sample:	SALES00001		{employeeCode} {counter}	Employee code of sender Customize position of counter			
			(councer)	customize position of counter			
	Save Cancel						

#### Figure 33: Created email tracking server (mailbox)

#### 4.6. OUTGOING MAIL (SETTING EMAIL NOTIFICATIONS)

To handle email notifications system, you need to define the outgoing mail server settings in the administration.

User menu  $\rightarrow$  System administration  $\rightarrow$  Sidebar: Mails  $\rightarrow$  Outgoing mail.

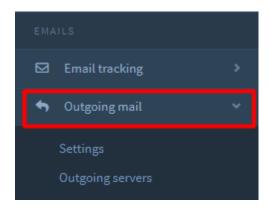




Figure 34: System administration: Outgoing mail

#### In the outgoing mail settings, you can choose three different behaviors of the system (Figure 32):

- Disabled Outgoing mail is not sent from platform (sending email notifications is blocked)
- SMTP server sending email notification and the message is enabled with the selection of outgoing (SMTP) email servers
- External service sending email notification and message is enabled by selecting plug-in through which to send outgoing mail.

#### User menu $\rightarrow$ System administration $\rightarrow$ Sidebar: Mails $\rightarrow$ Outgoing mail $\rightarrow$ Settings.

🛛 Quick Create 🗸 🔹 😫	🕀 English	4	۹, •	Available	John Smith	🎧 =
Dutgoing muil						
OUTGOING MAIL						
Outgoing mail configuration						
Service type: Disabled SMTP server External service						
Save						

#### Figure 35: Outgoing mail configuration

For adding Outgoing server, the administrator should go on Outgoing servers overview and choose the option Add in

the header. System administration  $\rightarrow$  Sidebar: Mails  $\rightarrow$  Outgoing mail $\rightarrow$  Outgoing servers.

For specific processes, you specify servers that will send email messages (eg. GDPR injuries, reminders, etc.).

For fields description on form for creating Outgoing server visit complete User's Guide under the Documentation part.

#### **4.7. SCHEDULED JOBS**

Platform supports execution of background tasks that are periodically executed. System administration  $\rightarrow$  Sidebar: Mails  $\rightarrow$  Scheduled jobs.

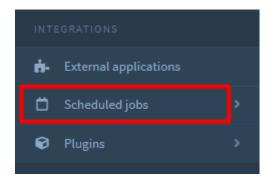


Figure 36: System administration: Scheduled jobs

The following types of scheduled tasks are currently supported (Table 2):

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Field name	Description
EMAIL TRACKING JOB	A background task that periodically checks incoming and outgoing mail in an email mailbox and connects emails with entities in (companies, contacts, leads, users, GDPR respondents).
REMINDERS JOB	A task that allows sending email or SMS reminders. Defining general reminders can be done in the Core submenu sidebar, while on offers, contracts you can define reminders that are related to the items.
PERIODIC INVOICE ISSUE JOB	The task that serves to issue and send recurring outgoing accounts. Users who use the <i>Accounts subsystem</i> have the ability to define recurring accounts. Task sends outbound accounts to clients according to repetition settings in a recurring account.
GDPR CONSENT REVOKING JOB	The task that is periodically executed and checks GDPR consents and for the expired GDPR consents sets status to expire.
SET NOT PAID INVOICES JOB	The task that verifies the issued outbound and outbound invoices issued by the expiration date - sets their status to <i>Unpaid</i> .
GDPR ACQUIRE CONSENTS JOB	The task is periodically executed and sent to a certain list of respondents (provided there is a legitimate basis for data collection) via which the respondents can give access to a specific purpose of processing through the GDPR Portal.
ASSET NETWORK DISCOVERY JOB	The task is periodically executed and over "network discovery" plugin detects and records new assets (eg. Open Audit).

#### Table 2: Supported scheduled tasks

The scheduled tasks are periodically executed on web service. Tasks may be in the following statuses:

- **Scheduled** the task is created, it needs to be started
- **Running** web service has scheduled the task and is periodically performed.
- **Stopped** is set when the administrator stops the task.
- Failed is set when three consecutive errors occur during task execution. The task was terminated due to a configuration or web service error.

For adding Scheduled job, the administrator should go on Scheduled jobs overview and choose the option Add in the header. Administration  $\rightarrow$  Sidebar: Scheduled jobs  $\rightarrow$  Overview.

#### Field description on Scheduled job adding form check-in complete User's Guide on Documentation part.



## 4.8. PLUGINS

The ability to expand system functionality through the Infinity ECM plug-in has been implemented and the plan is to support the ability to develop plugins for the Infinity ECM. The Administrator can access to Plugins over **System** 

administration  $\rightarrow$  Sidebar: Integrations.

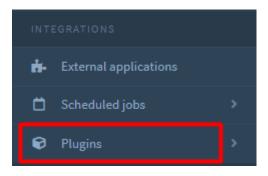


Figure 37: System administration - Plugins

Through platform are currently supported integration for:

- Call Center Service supports initiating calls for registered phone numbers
- Cloud Drive Service Supports upload/download/manage files on external file services and DMS (eg. Google Drive, Azure Storage, Alfresco)
- Mass Email Service Supports bulk email messaging through a marketing campaign
- Mass Fax Service supports mass mailing of fax messages through a marketing campaign
- Mass SMS Service Supports bulk SMS sending through a marketing campaign
- Outgoing Email Service Supports sending transactional email messages
- Currency Exchange Rate Service supports downloading and processing of exchange rates
- Asset Discovery Service Supports Calling NDIS System and Automatic Device Discovery on Network Infrastructure (e.g. Open Audit)
- SMS Provider supports sending SMS messages (e.g. InfoBip)
- e-Invoice Provider (in implementation) the plan is to enable sending an e-Account. For each integration point, additions within the have been implemented, which are specifically activated for each business. The list of active plugins for the company is in administration and is visible through the Plugins menu item on System administration → Sidebar: Integrations → Plugins.

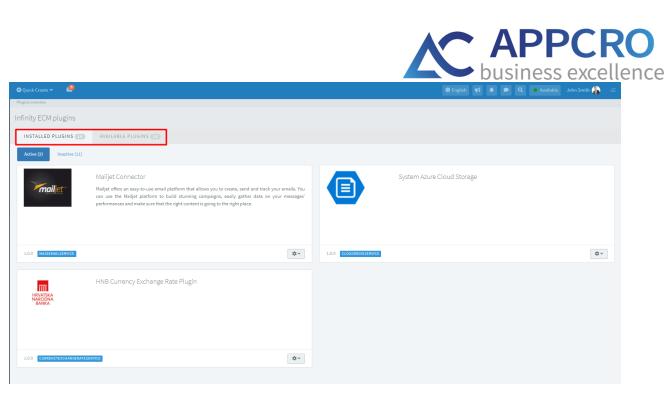


Figure 38: System administration: Plugins overview

When the system is delivered, the plugins are not configured, and the administrator must provide the plugins to the administration pages for properly work and necessary information's.

Each plugin can be temporarily disabled to not be displayed in the selections when starting specific processes that require them. Except for managing plugins through the Options, the administrator can define and select default plugins for specific business processes (e.g., the default plugin for downloading courses, initiating calls, etc.)

## APPCRO business excellence

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