



# QUICK START GUIDE

Verzija 1.3

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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*).

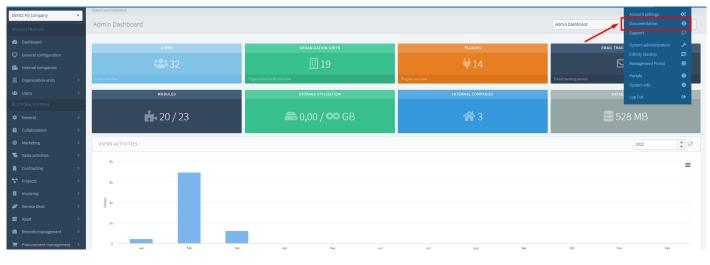


Figure 1: Dashboard – link on complete User's Guide

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.<br>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<br>SUPPLIER   |                     | _        | 9.3.2022. 8:00<br>7892WHJUNVF789WHUI                   |                                 |          |
| To Sales activities >    |  |                     |          |  |                                 |          |
| Contracting >            | A1<br>10.2.2022.14:36 • Croatia, Zagreb, 10000, Vrtni put, 1   |                     |          | Laurena Smith - VOLKSWAGEN SLOVAKIA<br>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<br>CLIENT PARTNER SOFTWARE VENDOR SOFTWARE NANUFACTURER |                     |          | 8.3.2022. 15:36<br>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<br>25.2.2022. 11:56<br>SUPPLIER  |                           |                        |             |     | Î  | Lauren Muller<br>9.3.2022. 8:00<br>7892WHJUNW | r - Adobe Systems II     |               |                   | Â             |
| Contracting Projects and programs                                  | A1<br>10.2.2022. 14:36 * Croatia, Zagreb, 10<br>CLIENT SUPPLIER PARTNER  | 000, Vrtni put, 1         |                        |             |     |    | Laurena Smit<br>8.3.2022. 15:37<br>347004252  | th - VOLKSWAGEN SLOVAKIA |               |                   |               |
|  | Alpha M<br>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                                | ><br>>   |                           |                        |             |     |    |   |                          |               |                   |               |
| 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<br>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<br>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<br>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.



|   |  | 🌒 Hrvatski | ۰ | ٩  | • Available                                      | John Smi | th 🎧 |
|---|--|------------|---|--|--|----------|------|
|   |  |            |   |  |  |          | •:   |
|   |  |            |   |  |  |          |      |
|   |  |            |   |  |  |          | ρ    |
|   |  |            |   |  |  |          | ¥    |
|   |  |            |   |  |  |          |      |
|   |  |            |   |  |  |          |      |
|   |  |            |   |  |  |          |      |
|   |  |            |   |  |  |          |      |
|   |  |            |   |  |  |          |      |
|   |  |            |   |  |  |          |      |
|   | OGGED USERS<br>User  |            |   | Last lo  | ogin   |          | ł    |
| AST L   |  |            |   | Last lo<br>prije 2   | ogin<br>1 minuta                                 |          | ł    |
| .AST L  | User   |            |   |  | 1 minuta   |          | ;    |
| LAST L  | User 🌡 John Smith  |            |   | prije 2  | 1 minuta<br>sata                                 |          | ł    |
| LAST L  | User<br>🌡 John Smith<br>💽 Ruby Osborne   |            |   | prije 2<br>prije 4   | 1 minuta<br>sata<br>sati                         |          | 1    |
| LAST L  | User<br>a John Smith<br>Cuby Osborne<br>Laura Smith  |            |   | prije 2<br>prije 4<br>prije 5  | 1 minuta<br>sata<br>sati<br>an                   |          | 6    |
| LAST L  | User<br>John Smith<br>W Ruby Osborne<br>Laura Smith<br>M Danielle Gough  |            |   | prije 2<br>prije 4<br>prije 5<br>prije d   | 1 minuta<br>sata<br>sati<br>an<br>dana           |          |      |
|   | User<br>John Smith<br>Ruby Osborne<br>Laura Smith<br>Danielle Gough<br>Phillip Vuong   |            |   | prije 2<br>prije 4<br>prije 5<br>prije d<br>prije 3                                  | 1 minuta<br>sata<br>sati<br>an<br>dana<br>dana   |          | \$   |
|   | User<br>John Smith<br>User<br>User<br>User<br>Nuby Osborne<br>User<br>Laura Smith<br>Danielle Gough<br>On Danielle Gough<br>On Phillip Vuong<br>Louis Lopez  |            |   | prije 2<br>prije 4<br>prije 5<br>prije d<br>prije 3<br>prije 8<br>prije 8            | 1 minuta<br>sata<br>sati<br>an<br>dana<br>dana   |          | 1    |
| LAST L<br>,<br>,<br>,<br>,<br>,<br>,<br>,<br>,<br>,<br>,<br>,<br>,<br>, | User<br>John Smith<br>User<br>User<br>User<br>User<br>User<br>User<br>User<br>User<br>User<br>User<br>User<br>User<br>User<br>User<br>User<br>User<br>User<br>User<br>User<br>User<br>User<br>User<br>User<br>User<br>Smith<br>User<br>Smith<br>User<br>Smith<br>User<br>Smith<br>User<br>Smith<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne<br>Osborne |            |   | prije 2<br>prije 4<br>prije 5<br>prije 6<br>prije 3<br>prije 8<br>prije 8<br>prije 1 | 1 minuta<br>sata<br>sati<br>dana<br>dana<br>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.



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|---|--|---|
| 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<br>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.



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|---|--|--|
| 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<br>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<br>Marketing                                      |                      |                       |                      |   |
|                                       | Contracts<br>Projects  | PRODUCTS/SERVIC      | ES                    |                      | Select all  |
|                                       | Invoices<br>Service desk   | Creating             | Updating              | ✓ Deleting           |   |
|                                       | Call center<br>360 views<br>Records management<br>Asset management | COMPANIES OVERV      | (IEW                  |                      | Select all <sup>v</sup> Deselect all <sup>v</sup> |
|                                       | Intranet portal<br>Human resources                                 | ✓ Creating           | Vpdating              | Deleting             |   |
|                                       | Corporate Governance<br>Email tracking                             |                      |                       |                      |   |
|                                       | Procurement manageme   | nt PRICE LISTS       |                       |                      | Select all Deselect all                           |
|                                       | External portals<br>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.

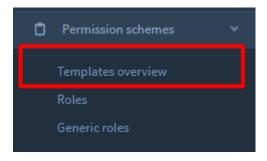


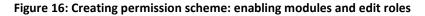
Figure 15: Administration sidebar: permission schema overview

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.

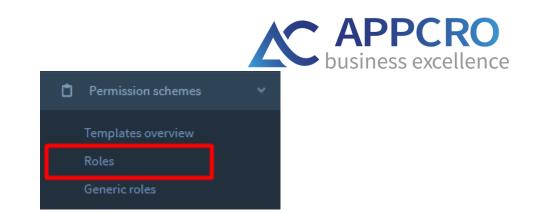


Figure 17: Administration sidebar: creating role group

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<br>Privacy Management            | Contacts   |                           |                               |
| Users overview         | Collaboration                                  | Contact deleted  |                           |                               |
| PLATFORM SYSTEMS       | Marketing<br>Sales activities                  | Contact edited   |                           |                               |
|                        | Contracts                                      | Products/services  |                           |                               |
| 🕸 General >            | Projects<br>Invoices                           | Product deleted  |                           |                               |
| 🗟 Collaboration >      | Service desk                                   | Product edited   |                           |                               |
| Marketing >            | Records management                             | Companies overview   |                           |                               |
| -                      | Asset management<br>Intranet portal            | Company deleted  |                           |                               |
| To Sales activities >  | Human resources                                | Company edited   |                           |                               |
| Contracting >          | Corporate Governance<br>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:<br>Server is down              |                       |      | + Cr | eate 💙                  | Clone | Edit      | Dele |
| ти | ≔     | Laura Smith updated an issue:<br>Server is down              |                       | 4S 🖪 |      | VERSIC                  | NS 2  |           |      |
| NT | ≔     | Laura Smith updated an issue:<br>Server is down              |                       |      |      |                         |       |           | «    |
|    | ≣     | Danielle Gough updated an issu<br>Paid vacation not paid off | e:<br>3 days ago      |      |      |                         |       |           |      |
|    |       | New al   | - f<br>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.

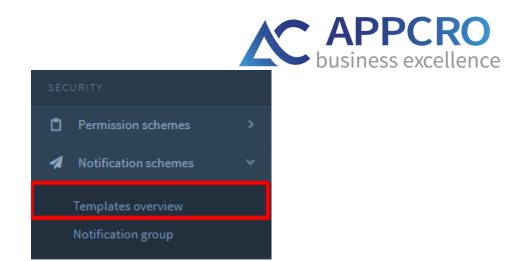
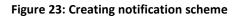


Figure 22: Administration sidebar: creating permission scheme

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.

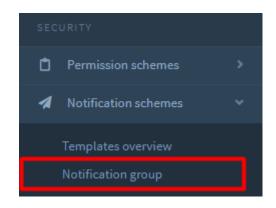


Figure 24: Administration sidebar: creating notification group

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.





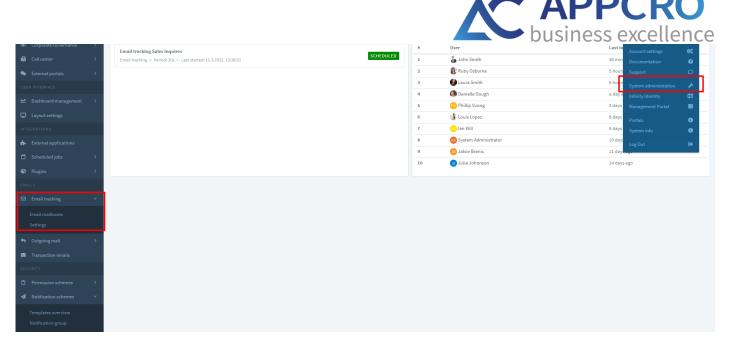
## 4.4. DASHBOARD MANAGEMENT

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.

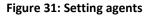
After the successful creation of the scheduled task, it is necessary to **start the task**. Platform will record a new task on a web service and run periodic mailbox tracking.



#### **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}<br>{day}            | Current month in year (2 digits)<br>Current day in month |                 |                  |
| Pattern:  |  | {dayYear}<br>{userid}       | Current day in year<br>Infinity User ID                  |                 |                  |
| Sample:   | SALES00001                                     | {employeeCode}<br>{counter} | Employee code of sender<br>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}<br>{day}            | Current month in year (2 digits)<br>Current day in month |     |             |                  |
| Pattern:             |                         |                       | {dayYear}<br>{userid}       | Current day in year<br>Infinity User ID                  |     |             |                  |
| Sample:              | SALES00001              |                       | {employeeCode}<br>{counter} | Employee code of sender<br>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.

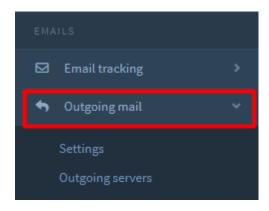




Figure 34: System administration: Outgoing mail

#### 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.

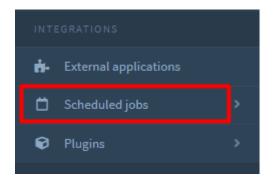


Figure 36: System administration: Scheduled jobs

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<br>mail in an email mailbox and connects emails with entities in<br>(companies, contacts, leads, users, GDPR respondents).  |
| REMINDERS JOB                  | A task that allows sending email or SMS reminders. Defining<br>general reminders can be done in the Core submenu sidebar,<br>while on offers, contracts you can define reminders that are<br>related to the items.   |
| PERIODIC INVOICE<br>ISSUE JOB  | The task that serves to issue and send recurring outgoing<br>accounts. Users who use the <i>Accounts subsystem</i> have the ability<br>to define recurring accounts. Task sends outbound accounts to<br>clients according to repetition settings in a recurring account. |
| GDPR CONSENT<br>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<br>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<br>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<br>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.

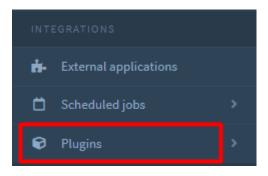


Figure 37: System administration - Plugins

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.

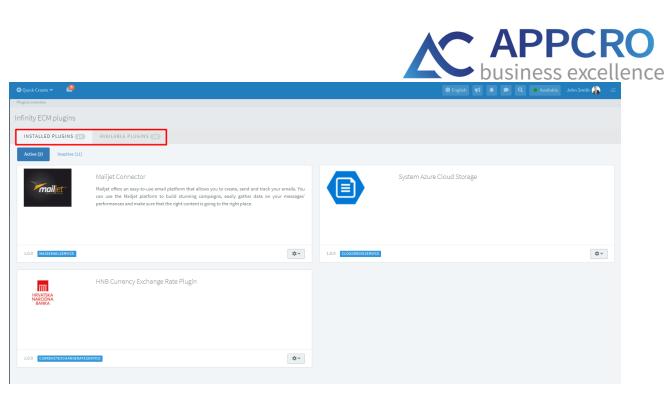


Figure 38: System administration: Plugins overview

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.)

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