For Workflow Manager

# Business to business Web application for managing of working processes



Version 1.1 - 01.06.2011



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# 1. **Overview**

The aim of the IA WORKFLOW MANAGER is to provide a tool to set tasks and track their execution. Since the software is realized as a Software-As-A-Service cloud computing solution it is fully web-based, and is compatible with leading operating system platforms and browsers and can be accessed worldwide by any user, allowing your organization to effectively manage tasks and user feedback. This cloud computing system enables distant management of virtual teams from any location. Any platform like PC, MAC, smart phone, iPad, any platform that has an internet browser can be a tool to access this system and any location where internet access is enabled can be your business office like home, restaurant or airport.

This system enables easy management of your project organisation, management of your team, definition of business rules, definition of user privileges, and controlling the performance through allocation and follows up of tasks. The employees are receiving their tasks and update their status. History of task progress and statuses are visible to all users and any directions misunderstanding are avoided.

The general functionality of this software product module enables managers to monitor execution of tasks even if they are not present on the site.

The module has the reporting functionality about employees performance per day/week/month etc.

This software is realization of Project Management software which monitors execution of tasks by enabling workflow setting and tracking. It manages administration of employees and tasks for different projects, by enabling workflow among actors (managers and employees).



# 1.1 **Basic functionalities**

Basic functionalities of the Workflow Manager are specified as follows:

General Functionalities			
Workflow functionalities	Every change in the project, workpackage or task is followed by the e-mail notification that is forwarded to all affected parties. On that way the manager and subordinate employees are promptly informed about changes of allocated tasks. All involved parties can continue with allocated activities as defined with the workflow process.		
Document management functionalities	The system provides options of attaching any type of documents (documents, spreadsheets, images, video files) that are related to or more precisely describe projects, workpackages, tasks or even task phase supporting document versioning.		
Time stamp and tracking	Include possibility for time stamp, reporting about all tasks		
Search and view	The users are enabled to search by many criteria related with projects, work packages and tasks		
Logging/Reporting	The system should generate different types of reports for managers about task performing and resource usage. Management has runtime information and reports without delays (usual time needed to prepare reports will be eliminated).		
Main Administration Modu	le		
Administration of registered companies	Enable administration of companies that use the system Manage companies – approve managers		
Register new company	A company should have opportunity to register their company details		
Administration Module for	Workflow functionalities		
Manage list of categories or topicsThe manager has opportunity to edit list of resources and add/del items			
Manage list of subordinate users	The manager has opportunity to edit list of users and groups, change their privileges for access on different projects, manage their contact details.		
Managerial Module			
List of tasks	Manager has an evidence of all tasks new, outstanding, completed, with all the details about like start and end date, who is responsible, what is the status and percentage of completion and level of priority		



List of projects	This module provides all necessary information about all projects. With the advanced search and filtering functionalities the manager can decide to see information that are of his / her higher importance			
Adding new or changing information about projects and work packages tasks	This module provides all necessary functionalities for adding new or changing information about projects and work packages tasks like definition of the project / workpackage manager, start and end date, priority, allocation of users			
Specifying tasks and allocation to resources	Through this functionality the manager can specify the task, describing in details the scope of the task, priority, deadline and responsible employees			
Follow up of execution of projects, work packages and tasks	This functionality enables easy follow up of execution of tasks with traffic light information for every task giving the manager possibility to react on every delay on time.			
Reporting functionalities	Advanced reporting functionalities that make presentations on different levels (projects, work packages, tasks, employees performance, performance on time scale)			
Respond on requests, comments suggestions suggestions,	The manager can receive any type of requests, comments or suggestions from the employees and adequately respond on them. List of requests, comments and suggestions are accompanied with traffic light about priority and deadline.			
Module for subordinates				
List of tasks	Subordinate employees have an evidence of all tasks new, outstanding, completed, that are allocated to them with all the details like start and end date, who is delegating the task, what is the current status and percentage of completion and level of priority			
Processing the tasks and evidence of all task related data	Subordinate employees can see all the details of allocated tasks and respond adequately. They can add information about the progress, change the status, evidence time of engagement, see their personal engagement through time			
Respond on allocated tasks / Follow up of execution of tasks	This functionality enables easy follow up of execution of tasks with traffic light information for every task giving the employee possibility to react on every delay on time.			
Reporting functionalities	Advanced reporting functionalities that make presentations on employee performance			

# 1.2 Workflow of tasks

The manager can assign tasks to employees! Whenever the task is assigned to the agent its status is New.



The employee can respond to the given task! Once he/she opens the new item then its status is changed to Pending (represented with one box)! He/She can change the status to In progress (represented with two boxes) and to Finished (represented with three boxes)!

The manager can approve the new item (represented with four boxes) or can reject with comment to be improved! Once the task is rejected it is treated as a new task in the system and the cycle re-starts!

Figure 1-1 shows the task statuses and transitions among the states, while the Figure 1-2 shows icons and presentations within the program.

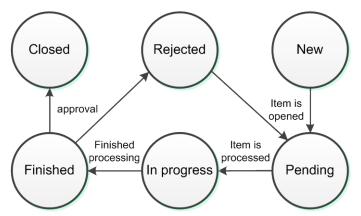


Figure 1-1: Task statuses and state transition diagram.

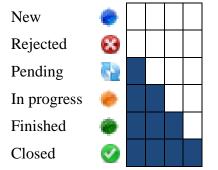


Figure 1-2: Icons and presentations of statuses.

The workflow may have additional transitions.

The first example is when the manager cancels the task although it can be In progress or Pending state, as presented in Figure 1-3.

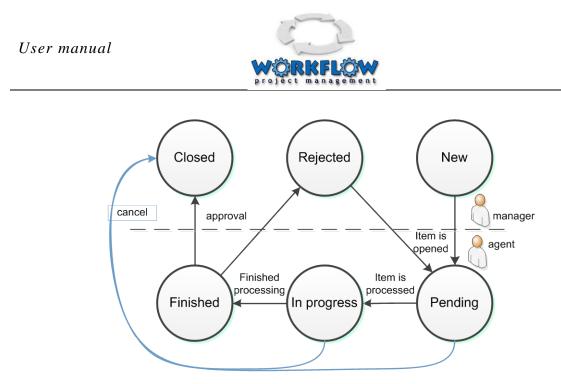


Figure 1-3: Additional workflow processes for manager role.

Another example of workflow is initiated by the agent, as presented in Figure 1-4 and contains two possible transitions: the clarification (when the agent refers to a given tasks and asks for a clarification) and suggestion (when the agent initiates a new idea).

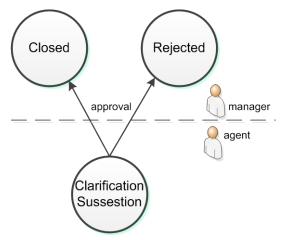


Figure 1-4: Additional workflow processes for agent role.

The Employer can also raise requests. List of requests that can be raised are set in a code table

- Request for decision making (various request for decision making);
- Request for approval of usage of business car;
- Request for approval of a business trip;
- Business trip allowance;
- HR documents request for approval of leave request;
- HR documents request for salary review,
- HR documents Request for issuing document for employment confirmation for credit, visa or other purposes,



The allocated roles and responsibility controls which of these requests can be grant to specific employee. It is set through the administrative module.

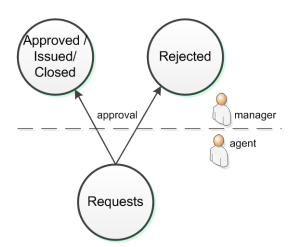


Figure 1-6: Additional workflow processes for agent role.

# 2. Starting with the system

This is a complete user guide in detailed steps for usage of the IA WORKFLOW MANAGER. <u>Innovation Services and Technologies</u> offers the IA WORKFLOW MANAGER <u>application</u> as cloud computing solution in a form of Software-As-A-Service. The initial registration process is described in section 2.1 and is realized as log in web page. The user should click the <u>register for service</u> and follow the registration procedure.

## 2.1 **Registration process**

Details about the registration page are shown in Figure 2-1. The input fields are positioned in the right panel called *register for a service*. All of them are mandatory. Additionally, the entered e-mail must be in proper e-mail form. After clicking the "register" button the registration request is sent to the IA WORKFLOW MANAGER main administrator for approval.

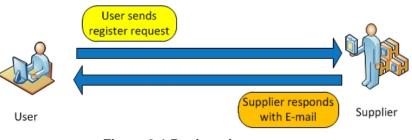


Figure 2-1 Registration process

After approving the request an e-mail is sent to the applicant with username and password credentials to log in as application administrator account. At this point the process of registering for the IA WORKFLOW MANAGER service is finished.



# 2.2 Setting up a new application

Setting up a new application is possible once the user has registered for the service and obtained the application administrator credentials. The application administrator logs in the IA WORKFLOW MANAGER system (more details can be found in section 3.1).

The entry point where the administrator adds new applications is the *Applications administration* page. The setting up procedure continues with setting up general specification about the application and creation of two new users: the provider manager and customer manager user, as described in Figure 2-2.

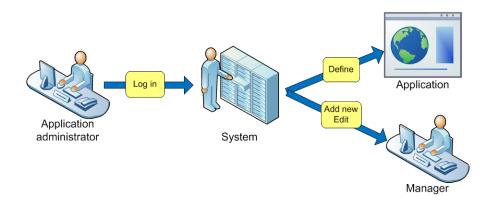


Figure 2-2 Setting up a new application

## 2.3 Setting up types, categories and agents

The details about application types and categories; and agents can be defined after the application administrator has defined the manager. The manager role in configuring the system are definition of types and categories and definition of agents, as in Figure 2-3.

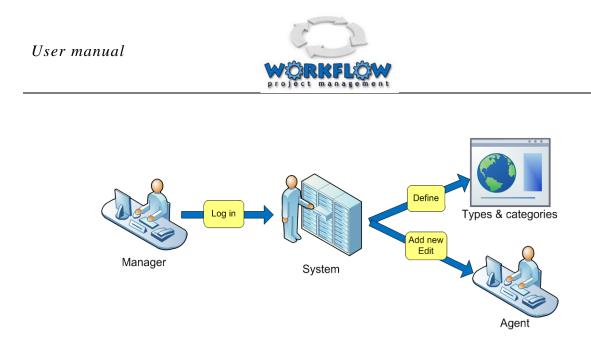


Figure 2-3: Setting up and configuring the system by the manager.

# 3. Appearance and functionality of the application

The IA WORKFLOW MANAGER application realized as cloud computing solution can be accessed at the address http://www.iacademy.mk/workflow/

The log in page is shown in the Figure 3-1. The application logo is positioned in the left half of the window. The input fields for authorization of user are positioned in the right half of the window in the account information panel. This panel will be explained in greater detail later in section 3.1 - User authorization and profile. The link used to register for service is provisioned directly above the panel. The login button is positioned in the right bottom part of the window.

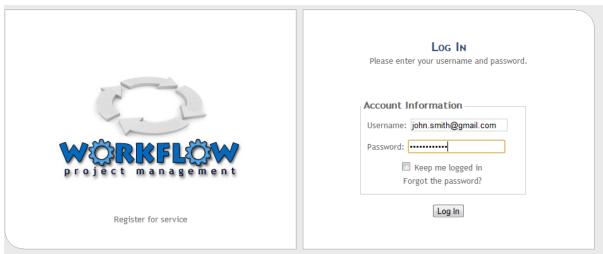


Figure 3-1 Log in page

There are 3 different types of user groups, and users from all the groups must log in to use the application:



- Company administrator with role to register and administer the application, assigns the managers of the Workflow Manager and management of users managers and employees.
- Manager with role to manage and assign employees, sets options, sets tasks, answers on clarifications and suggestions, monitors realization and has overview on reports
- Employee with role to realize tasks, to update the status, to ask for clarifications and suggestions, to raise requests and has overview on reports

Default action is click on log in button with filling proper username and password. The check box keep me logged in is used to give instructions to the browser to remember credentials and keep open the established session. The link forgot the password is used to reset the password and the link register for service is used to provide credentials for usage of the system.

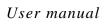
# 3.1 User authorization and profile

#### **3.1.1** User Authorization

The Workflow Manager differentiates 3 types of user groups can that can log on to the application:

- Company administrator log in, registers and administers the application, assigns the managers, and manages users managers and employees.
- Manager log in, manages and assigns employees, sets options, sets tasks, answers on clarifications and suggestions, monitors realization and has overview on reports
- Employee log in, realizes tasks, updates the status, asks for clarifications and suggestions, raises requests and has overview on reports

To log in, the user should enter the username and password in the text fields for username and password and then click the *Log in* button, as shown in Figure 3-2.





<b>LOG IN</b> Please enter your username and password.			
Account Information			
Username: john.smith@gmail.com			
Password: ••••••			
Keep me logged in			
Forgot the password?			
Log In			

Figure 3-2 Log in

After successful logging in the upper right corner of the top bar there is a welcome message with link a that enables changing of profile information of the user and possibility to log out from the system as shown in Figure 3-3. Logging out is done by pressing the [Log out] button.

Welcome John Smith ! [Log Out ] My Profile

Figure 3-3 Logging out and My profile bar

#### 3.1.2 Password reset

If for any reason user forgets the password he can click on *forgot the password* link as shown on Figure 3-4



<b>LOG IN</b> Please enter your username and password.
Account Information
Username: john.smith@gmail.com
Password:
Keep me logged in
Forgot the password?
Log In

Figure 3-4 Log in window

to go to the password reset page shown in Figure 3-5.

ent you will recieve a new te	nporary password by ema	ail and you will h	ave to reset it a	nd set a new passv	word immediately
.com					

#### Figure 3-5 Password reset page

Then user should enter his username which is an e-mail address and click the *send new password* button. A new password will be sent to that e-mail address. After that a user can log in with his username and the new password.

#### **3.1.3 Edit User Profile**

The rightmost end of the top bar (Figure 3-6) contains a link called *my profile*. By clicking it the browser will open the *My profile* page as shown in Figure 3-7.

Welcome John Smith ! [Log Out ] My Profile

Figure 3-6 Logging out and My profile bar

Possible action buttons are: *Back* to return to the previous page, *Save user info* to change the new information about the user and *Change password*.

There are two panels. The left panel is *Account info* and the right is *Change password*. In the *Account info* panel, a user can change his user name, name or surname. After making a change the *save user info* button should be clicked to save the change. If the username is



changed the user will be automatically logged out. Then he should log in with the new username.

Changing the password can be realized in the right panel called *Change password*. First the old *password* should be entered, than the *new password* and *confirm new password* which must be the same as the *new password*. The passwords must be at least 6 characters long and contain at least one special character. After changing the password the *change password* button should be pressed to change the password.

Appropriate action will be taken by clicking either *Save user info* button or *Change password* button and the user will be redirected to the default home page.

Back	Save user info Change p	assword				
you change	your user name the system will	logout you and	than you can log in again	with your ne	w user nam	ne.
	Accou	int general info			_	Change password
User name	john.smith@gmail.com		200 22	-	Old	•••••
(e-mail)	Check availability	Country	United States		Maur	•••••
Name	John	Zin	1000			
Name	[John	Lip	1000		Confirm	
Surname	Smith	City	LA			
Phone	+01123456789	State	California	•		
Fax		Address	New Avenue 123			

Figure 3-7 Profile information

# 3.2 **Company Administrator related functionalities and activities**

The Company Administrator is the first user type that is created with the registration process. Main tasks of the Company Administrator are to register and administer the application, assign the managers and manage other users (managers and employees).

The Company Administrator is the main contact person of the company and he/she is responsible for management of company details, and the contract for utilisation of services. Upon first login the company administrator should update company detail, create the manager that will use the Workflow Manager system, create the first project and work packages and assign the project to the manager.

#### 3.2.1 Main page of the company administrator

After company administrator logs in into the application (explained in section 3.2 - User authorization and profile

User Authorization) the default page is shown as in the Figure 3-8.



The default page has

- Toolbar with 5 buttons for additional functionalities
- Record of data related with information about the company
- List of all applications that the company have a subscription

#### Company info Edit History Projects Users Contracts Company name lacademy CEO Branko Djurovic Official Name Innovation Academy Contact Person Branko Djurovic Address lacademy City Skopje State / Zip 1000 Country Macedonia Phone +389 Fax Email branko.djurovic@iacademy.mk Web site http:// Added By Innovation Academy Admin Description 5/25/2011 1 1 1 1 1 Applications BRS WFL EMM SB SA ES 6/25/2011 1 1 1 1 1 Edit History Projects Users Contracts

Figure 3-8 Main page of the Company Administrator

#### 3.2.2 Navigation toolbar on the main page

The company administrators' main page has a Toolbar with 5 buttons for additional functionalities (see Figure 3-9):

- Edit Editing Company information
- History Preview of historical information about subscription to specific services
- Projects Administration of Projects
- Users Administration of Users
- Contracts Preview of active contracts

Edit History Projects	Users	Contracts
-----------------------	-------	-----------

Figure 3-9 Functional toolbar on the main page of the company administrator



#### 3.2.3 Company info

#### 3.2.3.1 Editing Company information

From the main page the company administrator can navigate to the page for editing of company information with pressing of the Edit button on the toolbar as presented on Figure 3-10

Edit	History	Projects	Users	Contracts
		Figur	e 3-10 Navig	gation Toolbar

The new page that is opening has a toolbar with buttons for the following functionalities:

- Back Navigation to the previous page
- Save Saving performed changes
- Cancel cancelling the performed changes

Under the toolbar there is a panel with company information that can be changed / updated on this page:

- Company name A text box for the Company name
- CEO A text box for the Name and Surname of the CEO of the Company
- Contact person is different check box that appoints the contact person (CEO or other)
- Email e-mail address of the CEO / contact person
- Contact information Country, Zip code, City, State Address, Phone, Fax, Web Site
- Logo Logo of the company
- Contact details of the person if different than CEO



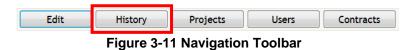
Back	Save Cancel		
Company name *	lacademy	Official Name *	Innovation Academy
CEO *	Branko Djurovic		
	Contact person is different		
Email *	branko.djurovic@iacademy.mk		
Country *	Macedonia	•	
Zip *	1000		
City *	Skopje		
State	No state	-	
Address *	lacademy		
Phone *	+389		
Fax			
Web site	http://		
	ia		
Logo	Browse	]	
Description			

To save performed changes the user should pres the save button before navigating out of the page.

#### 3.2.4 History

#### **3.2.4.1 Evidence of contract(s)**

From the main page the company administrator can navigate to the page for Preview of historical information about subscription to specific services with pressing on the History button on the toolbar as presented on Figure 3-11



At the upper left part of the page there is a button BACK to navigate out of this page and a filter tool for choosing of application and year that that the user is interested to see. Under the toolbar buttons there is a grid that gives a preview of previous subscriptions with the following information (Figure 3-12):

- Short name of the application



- Application name
- Year of the subscription
- Period of the subscription (Start Date and End date)

Ba	ck Choose application 🔽 🤇	Choose year	•	
	Application	Year	StartDate	EndDate
WFL	Workflow Management	2011	5/25/2011	6/25/2011

Figure 3-12 History of Contracts

#### 3.2.5 Administration of Projects

#### **3.2.5.1 Preview of all projects**

From the main page the company administrator can navigate to the Project page with pressing on the Project button on the toolbar as presented on Figure 3-13

Edit	History	Projects	Users	Contracts
				··

Figure 3-13 Navigation Toolbar

the user can navigate to the "My Project" form (Figure 3-14)

	New project		Description	Managers	StartDate	EndDate	Date Addeo
	Name		Description	Managers	StartDate	EndDate	Date Added
1 🧟 🦣 🕅	Hardware infrastructure	Implementati	on of a new hardware infrastructure	Branko CAdmin Djurovic	7/18/2011	8/1/2011	5/25/2011 1:33:47 PN
1/ 🧞 🎝 🖻	IT implement	ation New Project f	for IT implementation	Branko CAdmin Djurovic; Branko Djurovic	MGR 5/1/2011	7/1/2011	5/25/2011 11:18:11 A
i	▶ ▶ Page size	10 🔻				То	tal: 2 Active:

Figure 3-14 My Project form

On the "My Project" form the user can find a Toolbar from where following actions can be performed:

- Navigate Back (on the previous screen)



- Navigate to the New Project form for creation of a new project

On the "My Project" form the user can find a table grid that lists all the projects with their statuses. The leftmost column has control buttons that helps in managing project details (see Figure 3-15).



Figure 3-15 Status Signs

Consequently the meaning of each button is as follows:

- Edit 🧾 button for navigation to the page for editing projects
- Add User 🤽 button for navigation to the page for adding users to the specific project
- Work package 🚚 button for navigation to the page for preview of work packages
- Plan 🔛 button for navigation to the page for preview of the
- Finish 🔳 button for navigation to the page for finishing of the project

Bellow the grid there is a Record navigation bar (Figure 3-16) and a bar with explanation of status signs (Figure 3-17)



#### 3.2.5.2 Adding New Project or editing an Existing project

From the page that gives a preview of all project, (3.3.5.1 Preview of all projects) the user can navigate to a page where it is allowed to add a new project or change / update general information about the project (Figure 3-18).



On the "Add Project" form the user can find a Toolbar from where following actions can be performed:

- Back Navigate Back (on the previous screen)
- Add Project When data for the new project will be entered, with pressing of this button the user confirms entered data and saves information about the project.
- Cancel to cancel all performed changes

Under the toolbar there is a record of data related with the specific project. The user can fulfil / update the following information about the project:

- Name name of the project
- Description Short description of the project
- Logo possibility to attach a logo if appropriate to the project
- Link additional information if necessary for the external link
- Start date off the project
- End Date of the project
- Priority levels of the project



Back A	dd projec	t Cancel		
Name	Hardwar	re Infrastructure		
Description	impleme infrastru	entation of a new H ucture	Hardware 🔺	
Logo			Browse	
Link	http://www	.website.com		
Start date	7/18/20	11		
End date	8/1/201	1		
			Name	Urgency Time (working days)
		Low		
		Normal		
Priority levels	<b>V</b>	High		
		Urgent		
		Immediate		
	Select A	ll Deselect All		

Figure 3-18 Adding or editing project information

#### 3.2.5.3 Preview of work packages in a project

From the page that gives a preview of all project, (3.3.5.1 Preview of all projects) the user can navigate to a page for preview of work packages



Pro	Project workpackages						
Back New workpackage			Nev	v workpackage			
			Priority	Name	Users		
1	28		<b>1</b> 🖡	Purchasing of the equipmnet	Branko EMP Djurovic		
1	🛿 🚴 🕮 🛊 👎 📕 Installation of the equipment 🛛 Branko EMP Djurovic						
M	K € 1 of 1 ► H Page size 10 ▼						
	Ва	ack	Nev	v workpackage			

On the "Project Workpackages" form the user can find a Toolbar from where following actions can be performed:

- Back Navigate Back (on the previous screen)
- New WorkPackage Navigate to a page for creating new work package

Under the toolbar there is a grid that presents information about created work packages. The user can fulfil / update the following information about the project:

- Tool buttons three tool buttons for editing work package, adding users to the work package and deleting a work package
- Priority functional button for changing the priority of work packages
- Name name of the work package
- Users Users that are part or are allocated on specific work package

Bellow the grid there is a Record navigation bar (Figure 3-19):

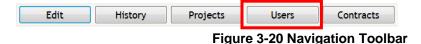


Figure 3-19 Record navigation bar

#### 3.2.6 Administration of Users

#### **3.2.6.1** Evidence of users

From the main page the company administrator can navigate to the Users page with pressing on the USERS button on the toolbar as presented on Figure 3-20



the user can navigate to the "My Users" form (Figure 3-21)



Му	User	rs				
	Ba	ck New User	All projects	▼ All Roles ▼	Search	
		Name	Surname	User Name	Applications	
1	0	Branko MGR	Djurovic	branko.djurovic@gmail.com	WFL	5/25/2011
1	0	Branko EMP	Djurovic	branko.djurovic@hotmail.com	WFL	5/25/2011
M	I of 1   Image size   10   Image Active   Total: 2 Active					
	Ва	ck New User	•			

#### Figure 3-21 My users forma

On the "My users" form the user can find a toolbar with two functional buttons:

- Back to navigate to the previous page
- New User to navigate on a page for definition of a new user

Additionally, on the toolbar there are two filter tools for filtering of the priview of users by project and by role, and a search field that helps in searching of a specific user by name or part of the name.

Under the toolbar there is a grid with data related with created users. The grid contains following user related data:

- Edit user functional button for navigation on a page for editing of user
- Deactivate user functional button for deactivation of the user
- Name name of the user
- Surname Surname of the user
- User Name user name that is used in the application for authentication
- Applications applications that the user has access rights
- Date date of creation of the user

Bellow the grid there is a Record navigation bar (Figure 3-22):



# 3.2.6.2 Editing user

From the "My user" page the user can navigate to the page for editing of the user.

On the "Edit user - general" page the user can find a toolbar with four functional buttons:

- Back to navigate back on the previous page
- Save to save performed changes



- Application Role to navigate on the page for managing application roles granted to a specific user
- Project Role to navigate on the page for managing project roles granted to a specific user

Edit user - general								
Back Sa								
User name (e-mail)	branko.djurovic@gmail.com Check availability	Country	Macedonia					
Password		Zip	1000					
Confirm Password		City	Skopje					
Name	Branko MGR	State	No state					
Surname	Djurovic	Address	Arhimedova bb					
Phone	+38975226071	Fax						
Back Sa	Back Save Applications Roles Projects Roles							

Under the toolbar the user can access to user specific date where he/she can view and update required information related with the:

- User name
- Password,
- Name
- Surname
- Phone
- Country
- Zip code
- City
- State
- Address
- Fax

#### 3.2.6.3 Granting a specific role to a user

From the "Edit user - general" page the user can navigate to the "Edit user - application and roles" page (Figure 3-23) for granting specific role to a user.

On the page the user can find a toolbar with four functional buttons:

- Back to navigate back on the previous page
- Save to save performed changes



- Cancel - cancelling performed changes

Under the toolbar there are two panels: one for selecting if specific user have rights to access on specific application (in this case the application for Workflow management), the second for selecting what is the role that will be granted to a specific user related with selected application. In the workflow manager there are three possible roles that can be granted to a user: Company administrator, Manager or Employee. The system supports granting of one or more roles to a specific user. In case more than one role is granted to the user the application will dynamically change its behaviour depending on the mode on which the user is working on.

Edit user -	applications	and roles

Back Save Car	cel
Applications	Roles
☑ Workflow Management	<ul> <li>Company Administrator</li> <li>Manager</li> <li>Employee</li> </ul>
Back Save Car	cel

Figure 3-23 Edit user applications and roles

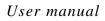
#### **3.2.6.4** Assigning an access to a user for specific project or work package

From the "Edit user - general" page the user can navigate to the "Edit user - application and roles" page (Figure 3-24) for granting a specific role to a user for specific project.

On the page the user can find a toolbar with four functional buttons:

- Back to navigate back on the previous page
- Save to save performed changes
- Cancel cancelling performed changes

Under the toolbar there are three panels: one for selecting a project where the user will have access, the type of the role that will be granted to a specific user (in case the user has more that one role defined on the level of the application in this are it will be allowed selection of only on e role), third panel for definition of work packages where the user will have acces and that can work over. The system provides a functionality where one person can have more than one role for one application (Company administrator, Manager and / or Employee), but on one project that user can have only one role (either Company administrator, Manager or Employee).





Edit user - projects and roles

orkflow Management		
Projects	Roles	Modules
IT implementation	Manager	WorkPackage 1 Workpackage2 Select All Deselect All
I Hardware infrastructure	Manager	Purchasing of the equipmnet     Select All

Figure 3-24 Edit user - project and roles

After performing the changes the user should pres the save button in order to save the changes, otherwise, if the user will navigate out of the page without saving, date will remain unchanged.

#### **3.2.7** Preview of contracts

From the main page the company administrator can navigate to the Contracts page with pressing on the CONTRACTS button on the toolbar as presented on Figure 3-25

[	Edit	History	Projects	Users	Contracts		
	Figure 3-25 Navigation Tool						

the user	can	navigate	to th	e "Mv	Contracts"	form	(Figure 3-2	6)
the user	Call	navigate	10 11	le IVIY	Contracts	IOIIII	(Figure 3-2	U)

My Contract Back	ts				
All applicatio	ns 🔹 Year 💌	Search			
Done %	Contract	Application	Туре	Valid To	InvoiceNumber
۲	25.05.2011	WFL	1 Month	25.06.2011	No Invoice
I	1 🕨 🕅 Page si	ize 10 💽 🗆 Active			Total: 1 Active: 1

Figure 3-26 My Contract page

On this page the user can view all the contracts that his company has for usage of services:



Available information on this pare are:

- Done % a traffic light that shows how close the contract is to finishing of the subscription
- Contract Contract date
- Application The name of the application that is coveded with specific contract,
- Type type of subscription
- Valid to Date until when the contract is valid
- Invoice Number the number of the invoice

Bellow the grid there is a Record navigation bar.

# 3.3 Manager related functionalities and activities

#### **3.3.1** Main page of the manager

After manager logs in (explained in section 3.2 - User authorization and profile User Authorization) the default page is shown as in the Figure 3-27.

The default page has

- a "To Do" section that lists tasks that should be done,
- Toolbar with 5 buttons for additional functionalities
- several dropdown fields that are used as a filter for displaying tasks
- grid with data related with tasks
- status and record navigation bar

v T	o-Do:							9	Suggestions
_	Projec	ts Schedule Users Reports Opti	ons						
	projec		Search						
чu	projec	All packages V All statuse: V	Search						
	ID	Subject	Project	Work Package	Assigned To	Schedule	Deadline	Priority	Done
	141	Requests and suggestions	Workflow Manager	Tasks	Nikola Nacov; Pano Gushev	23.02.2011	27.02.2011	***	0%
•	140	SW design	Workflow Manager	Other	Branko Djurovic	21.02.2011	25.02.2011	***	0%
•	139	User manual	Workflow Manager	Other	Branko Djurovic	23.02.2011	25.02.2011	***	0%
•	138	Technical specification	Workflow Manager	Other	Branko Djurovic	22.02.2011	25.02.2011	***	0%
•	137	DB optimization	Workflow Manager	Tasks	Branko Djurovic; Nikola Nacov; Pano Gushev	21.02.2011	25.02.2011	***	0%
•	136	Multiply to each individual	Workflow Manager	Tasks	Nikola Nacov; Pano Gushev	23.02.2011	25.02.2011	***	0%
•	135	Light version	Workflow Manager	Tasks	Nikola Nacov; Pano Gushev	22.02.2011	25.02.2011	***	0%
•	134	Task 1 za testiranje	Workflow Manager	Tasks	Branko Djurovic	11.02.2011	15.02.2011	**	0%
•	133	Attach file	Workflow Manager	Tasks	Nikola Nacov; Pano Gushev	11.02.2011	13.02.2011	***	50%
2	120	prikaz na username	Suggestion Box	Admin	Kristina Kolic	03.02.2011	03.02.2011	+	100%

Figure 3-27 Managers default page



Using the Toolbar with 5 buttons for additional functionalities the manager has the functionalities to manage projects, control employees schedule, manage all user groups, view centralized reports and set options of the application utilizing the toolbar as presented on Figure 3-28

Projects	Schedule	Users	Reports	Options
		<u> </u>		

Figure 3-28 Toolbar of managerial functionalities

- Manager has the ability to manage projects as explained in section 3.4.2. Also they can create new work packages and tasks.
- Manager has the ability to control employees schedule as explained in section 0.
- Manager has the ability to manage all user groups as explained in section 3.4.4.
- Manager has the ability to view centralized reports in graphical and tabular form for the progress and status of projects, work packages and tasks explained in section 3.4.5.
- Manager has the ability to set options of the application as explained in section **Error!** Reference source not found.

To be able to see all the projects the manager should be select the *All projects* value from the Projects drop down list Figure 3-29. Other Drop down fields enable filtering by other criteria like Employee, work package, Task statuses.

All projects	✓ All Employee ▼ All packages ▼ All statuse: ▼	Search

#### Figure 3-29 Drop down list

On the default page there is a grid with tasks related data (Figure 3-30). In row there are information about:

- Task Status
- Task Id
- Task subject
- Project name
- Work package name
- To whom the task is assigned
- Task schedule (start date)
- Task deadline (end date)
- Task priority
- Percentage of task completion (Done)



	ID	Subject	Project	Work Package	Assigned To	Schedule	Deadline	Priority	Done
•	141	Requests and suggestions	Workflow Manager	Tasks	Nikola Nacov; Pano Gushev	23.02.2011	27.02.2011	***	0%
•	140	SW design	Workflow Manager	Other	Branko Djurovic	21.02.2011	25.02.2011	***	0%
•	139	User manual	Workflow Manager	Other	Branko Djurovic	23.02.2011	25.02.2011	***	0%
•	138	Technical specification	Workflow Manager	Other	Branko Djurovic	22.02.2011	25.02.2011	***	0%
•	137	DB optimization	Workflow Manager	Tasks	Branko Djurovic; Nikola Nacov; Pano Gushev	21.02.2011	25.02.2011	***	0%
•	136	Multiply to each individual	Workflow Manager	Tasks	Nikola Nacov; Pano Gushev	23.02.2011	25.02.2011	***	0%
•	135	Light version	Workflow Manager	Tasks	Nikola Nacov; Pano Gushev	22.02.2011	25.02.2011	***	0%
•	134	Task 1 za testiranje	Workflow Manager	Tasks	Branko Djurovic	11.02.2011	15.02.2011	**	0%
•	133	Attach file	Workflow Manager	Tasks	Nikola Nacov; Pano Gushev	11.02.2011	13.02.2011	***	50%
	120	prikaz na username	Suggestion Box	Admin	Kristina Kolic	03.02.2011	03.02.2011	*	100%

Figure 3-30 Grid with tasks related data

On the bottom of the grid there is legend with the meaning each sign of the task status accompanied with information how many tasks are with a specific status (Figure 3-31).

Total: 31 💩 New: 8 🙀 Pending: 2 🧼 In Progress: 2 🌰 Resolved: 0 🧭 Closed: 19 🐼 Rejected: 0

#### Figure 3-31 Legend with the meaning each sign of the task status

Bellow the grid there is a Record navigation bar as presented on the figure bellow (Figure 3-32)

H ◀ 1 of 4 ▶ H	Page size 10	-
----------------	--------------	---

Figure 3-32 Record navigation bar

#### 3.3.2 Managing Projects

With pressing of the "Project" button from the main toolbar of the managers default page, Figure 3-33

Projects	Schedule	Users	Reports	Options

#### Figure 3-33 The main toolbar of the managers default page

the user can navigate to the "My Project" form (Figure 3-34)



Back	ew project Project p	lan Add task			
	Project Name	Description	Managers	StartDate	EndDate
í 🥾 🎝 🔯 🕮	E-mail Marketing	E-Mail Marketing Cloud Computing CRM system	Marjan Gushev	1/17/2011	2/28/2011
í 🚴 🎝 🔯 🕮	IA Promotion	Web site, promo materials, icons, logos, graphic design	Marjan Gushev	1/3/2011	12/30/2011
í 🥾 🌲 🔯 🕮	Suggestion Box	Cloud computing solution for suggestion box	Marjan Gushev; Manager Iacademy; Branko Djurovic	1/17/2011	2/25/2011
í 🥾 🧶 🔯 🕮	Workflow Manager	Workflow management	Marjan Gushev; Branko Djurovic; Manager Iacademy	12/13/2010	1/21/2011
í 🥾 🎝 🔯 🏙	Documentation	User Manuals, Software Requirements, Technical Specification	Marjan Gushev	1/3/2011	12/30/201
í 🚴 🎝 🔯 🕮	IA Management	Learning management site	Marjan Gushev	7/12/2010	1/21/2011
í 🥾 🌒 🛐 🕮	Innovation Academy	Administrative and technical support	Marjan Gushev	1/3/2011	12/30/201
í 🤽 🌲 🔯 🕮	Bug Reporting System	Application for reporting software bugs	Manager Iacademy; Marjan Gushev; Branko Djurovic	11/8/2010	12/10/201
í 🥾 🧶 🖻 🕮	Business Outsourcing Center	Application for Call Center and Business Outsourcing	Manager Iacademy; Marjan Gushev	3/1/2011	4/15/2011
<i>\$</i>	Test	Test	Marjan Gushev; Branko Djurovic	1/11/2011	1/31/2011
◀ 1 of 1 ▶	▶ Page size 10 ▼		🚸 - Finished 🗹 - Edit 🔕 - Users 🎝	- Workpackage	s 🕮 - Finisł

Figure 3-34 My Projects Form

On the "My Project" form the user can find a Toolbar (Figure 3-35) from where following actions can be performed:

- Navigate Back (on the previous screen)
- Navigate to the New Project form for creation of a new project
- Navigate to the Project plan form to see the status of projects
- Navigate to the form for adding and delegating new task

Back	New project	Project plan	Add task
	E'		

Figure 3-35 Toolbar of the My Projects Form

On the "My Project" form the user can find a table grid that lists all the projects with their statuses (see Figure 3-36).



#### Figure 3-36 Status Signs

Bellow the grid there is a Record navigation bar (Figure 3-37) and a bar with explanation of status signs (Figure 3-38)



Figure 3-37 Record navigation bar



Figure 3-38 Explanation of Status Signs

#### 3.3.2.1 Adding new Project

With pressing of the "New Project" button from the main toolbar of the "My Projects" page

Back	<u> </u>	· · ·	of the "My Projec	te" forn
Back	New project	Project plan	Add task	

The user can navigate to the "Add New Project" form (Figure 3-40)

Add project Back	Add project Cancel
Project name	Project Name
Project description	Free text for project description
Start date	2/1/2011
End date	3/1/2011
Back	Add project Cancel

Figure 3-40 Add New Project form

On that form the user can add new project with fulfilling details about the project like Project name, Project description, Start and End date. With pressing on the Add Project button the user is confirming the entrance. With pressing on the Back button the user is navigating to the previous form (My Projects Form).

#### 3.3.2.2 Preview of the project plan - Project plan Schedule

With pressing of the "Project Plan" button from the main toolbar of the "My Projects" page



The user can navigate to the Project plan Schedule

Project Plan								
Back All	Start Da	Start Date 2011-02-21			End Date 2011-02-27			
Project								
	WorkPackage	21.2	22.2	23.2	24.2	25.2	26.2	27.2
	Tasks	14	12	12	8			
Workflow Manager	Other	2	6	7	7	6		
	TOTAL	16	18	19	15	6	0	0

Figure 3-42 Project plan Schedule

With pressing on the Back button the user is navigating to the previous form (My Projects Form).

#### 3.3.2.3 Adding new or editing existing task

With pressing of the "Add Task" button from the main toolbar of the "My Projects" page

Back	New project	Project plan	Add task

The user can navigate to the New Task page (Figure 3-43)



New Issue											
Back	Add	Cancel	Re-schedule								
Please complete the form	below. This repor	t will be logged	and sent to the	employment team	on a high prio	rity basis thro	ough the e	mploym	ent system.		
Project	BRS		•	Workpackage	Module 1		-				
Subject	Creating a new p	resentation									
Problem Description	A presentation fo	or the new pro	duct should be	created					<ul> <li>What you would like the employee to do?</li> <li>Detailed information about the task?</li> <li>Description of the steps for the task?</li> </ul>		
File	🖱 Select File										
Priority	Normat Recurrent										
Predecessor	No predecessor	- Ont	y this workpack	age							
Start date	5/27/2011				🗹 Pano	🗷 Nikola					
End date	6/1/2011			Assigned To	Gushev AName ASurName				version rent task for each employee		
Schedule	Fri (27/5)	Mon (30/5)	Tue (31/5)	Wed (1/6)							
Pano Gushev	2 + 2 h	1 + 2 h	1 + 2 h	2 + 2 h							
AName ASurName	0	0	0	0							
Nikola Nacov	0 + 3 h	0 + 3 h	0 + 3 h	0 + 3 h							
John Johns	5	5	5	5							
Monitoring	Manager3nd N	Nanager3nsd 🛛	AName ASurt	Iame 🔳 John Joh	ns						
Back	Add	Cancel	Re-schedule								

Figure 3-43 Form For entering and delegating new task

On the "New Task" page the user can find a toolbar with four functional buttons:

- Back to navigate back on the previous page
- Add to save performed changes
- Cancel to cancel the performed changes
- Re-schedule rescheduling of task activities

Through this form the user can enter all required details for the new task or update an existing one. The new task form enables entering a lot of details such as:

- Project a drop down menu for selection of a project from the list of existing projects
- Work package a drop down menu for selection of a work package from the list of work packages
- Subject field for entering the title of the new task
- Problem Description field for entering the description of the task
- File field for attaching document for the specific task
- Priority Field that indicates the priority of the task
- Recurrent Field that indicates if the task is recurrent
- Predecessor field that enables entering of some predecessor task
- Start and End date of the task
- Assigned to field that indicated to whom this task is assigned. The application provides a check box for every employee that this task can be assigne.



- Light version if this check box is marked than the employer will use the light version that actually mean that very few details should be entered in the process of execution of the task. Otherwise, the system will require more detail information about performed tasks
- Schedule planned schedule for all assigned employees for the period of performing the task. The manager has an evidence of the engagement of the employee expressed in hours for every day when this task is planned to be performed.
- Monitoring Field that indicates who is monitoring the performance of the task

To create a new task, first the user is selecting the project and work package to which this new task is associated. Then he/she enters all task related data. For the people that the manager has assigned the task can specify when assigned employees can perform that task. When all required data are entered the user confirms the task with pressing of the "Add" button and after that the user can navigate to the previous form.

In the process of editing a task the user (manager) is navigating to the Edit Task page (Figure 3-44).

Back	Sav	/e	Suspend	Cancel	Re-schedule	Postpone		
Assigned By	Marj	an Gusev						
Project	BRS				- Wor	kpackage Module 1		<ul> <li>Light version</li> </ul>
Subject	ct Creating a new presentation							
oblem Description	1	esentation f	or the new pro	duct should be c	reated			
File	No f	iles attached			🖹 Select F	ile		
Priority	No	rmal 💌						
Predecesso	No	predecessor		Only this	s workpackage			
Start date	5/2	5/27/2011				Pano Gushev		
End date	6/1/2011		Assigned To AName ASurName V Nikola Nacov John Johns					
Schedule		Fri (27/5)	Mon (30/5	) Tue (31/5)	Wed (1/6)			
ano Gushev		4	3	3	4			
Name ASurName		0	0	0	0			
ikola Nacov		0 + 3 h	0 + 3 h	0 + 3 h	0 + 3 h			
ohn Johns		5	5	5	5			
Monitoring		Nanager3nd /	Manager3nsd	AName ASurNa	me 🔲 John Johi	15		
		New	Pending	InProgress	Resolved	Rejected	Closed	
Timing	, n av	27/2011 38:11 PM						
	,							

Figure 3-44 Edit Task Page



On the "Edit Task" page the user can find a toolbar with four functional buttons:

- Back to navigate back on the previous page
- Save to save performed changes
- Suspend to suspend the task
- Cancel to cancel the performed changes
- Re-schedule to reschedule engagement of some employees for the specific task
- Postpone to postpone the task for a period of time

Throughout this page the manager can change the following details related with the task: project name, work package, subject, problem description, file, priority, predecessor, start date, end date, to whom the task is assigned and schedule.

# **3.3.3** Controlling the employees schedule

With pressing of the "Schedule" button from the main toolbar of the managers default page,(Figure 3-45)

Projects			cr of the men	
Projects	Schedule	Users	Reports	Options

Figure 3-45 Main toolbar of the managers default page

the user can navigate to the "Employee Schedule" form (Figure 3-46)

Back All	projects 💌	All Employees 💌 Start	Date 2011-02-21	End Date	2011-0	2-27				
Project	WorkPackage	Subject	Employee	21.2	22.2	23.2	24.2	25.2	26.2	27.2
Workflow Manager	Tasks	Light version	Nikola Nacov		4					
Workflow Manager	Tasks	Light version	Pano Gushev		8					
Workflow Manager	Tasks	Multiply to each individual	Pano Gushev			4				
Workflow Manager	Tasks	DB optimization	Branko Djurovic	4						
Workflow Manager	Tasks	DB optimization	Nikola Nacov	6						
Workflow Manager	Tasks	DB optimization	Pano Gushev	4						
Workflow Manager	Other	Technical specification	Branko Djurovic		4	4	4			
Workflow Manager	Other	User manual	Branko Djurovic			2	2	4		
Workflow Manager	Other	SW design	Branko Djurovic	2	2	1	1	2		
Workflow Manager	Tasks	Requests and suggestions	Nikola Nacov			4	4			
Workflow Manager	Tasks	Requests and suggestions	Pano Gushev			4	4			
			TOTAL	16	18	19	15	6	0	0

Figure 3-46 Employee Schedule form

On that form the user can see the schedule of engagement of employees for specific period. The Back navigation button enables navigation to the previous form.



The search and filter bar enables filtering of data that will be presented in the employees schedule grid. Filtering can be performed by Project (all or specific), employee (all or specific) and period of engagement (From "start date" till "end date").

The employees schedule grid makes a presentation of employees on which task they were working and how much time they have spent on a specific task presented in hours per day.

At the bottom there is a Total bar that summarises the daily engagement presented in Hours.

# 3.3.4 Managing users

With pressing of the "Users" button from the main toolbar of the managers default page,(Figure 3-47)

Projects	Schedule	Users	Reports	Options	
	Figure 3-	47 Main toolb	ar of the mana	agers default p	age

the user can navigate to the "My Users" form (Figure 3-48)

	Bac	k	Innovation	Academy 👻	Workflow Manager	Search New User			
		Name	Surname	Role	User Name	Project name	ls approved	ls locked	Last login
1	0	Marjan	Gushev	manager	marjan.gusev@iacademy.mk	Bug Reporting System; Business Outsourcing Center; Documentation; E-mail Marketing; IA Management; IA Promotion; Innovation Academy; Suggestion Box; Workflow Manager	<b>V</b>		2/21/201 9:40:06 A/
1	0	Nikola	Nacov	employee	nikola.nacov@innovation.com.mk	Bug Reporting System; Business Outsourcing Center; E-mail Marketing; IA Promotion; Workflow Manager	7		2/20/201 9:46:52 A
1	0	Pano	Gushev	employee	pano.gushev@innovation.com.mk	Bug Reporting System; Business Outsourcing Center; E-mail Marketing; IA Promotion; Workflow Manager	V		2/19/201 10:39:11 /
1	0	Manager	lacademy	manager	manager@iacademy.mk	Bug Reporting System; Business Outsourcing Center; Suggestion Box; Workflow Manager	7		2/19/201 10:30:19/
1	0	Branko	Djurovic	manager	branko.djurovic@gmail.com	Bug Reporting System; Suggestion Box; Workflow Manager	V		2/21/201 6:03:59 F
1	0	Branko	Djurovic	employee	branko.djurovic@iacademy.mk	Innovation Academy; Workflow Manager	7		2/21/201 4:43:11 F
1	0	Test	Employee	employee	marjan@on.net.mk	Suggestion Box; Workflow Manager	V		2/10/201 7:21:11 P
•	•	1 of 1 ▶	► Page	e size 10 🔻					

Figure 3-48 My Users form

Through this form the manager has an evidence of all users of the application obtaining information about the name of users, their username, projects that they are working on, information if the user is approved or locked and when last login of the user was.

The Back navigation button enables navigation to the previous form.

The search and filter bar enables filtering of data that will be presented in the My Users grid.

With pressing of the "New User" button from the toolbar many the user can navigate to the "New / Edit User" form ()



Back	Save		
u change your user	name the system will logout you	ı and than you can log in again wit	h your new user name
		Account info	
Jser name (e-mail)	pano.gushev@innovation.com Check availability	.mk Nar	Pano
Password		Surna	Gushev
Confirm Password		Pho	ne
Role	<ul><li>Manager</li><li>Employee</li></ul>	Compan	ies
Projects	<ul> <li>Bug Reporting System</li> <li>IA Management</li> <li>Suggestion Box</li> <li>E-mail Marketing</li> <li>Select All Deselect All</li> </ul>	<ul> <li>☑ Business Outsourcing Cer</li> <li>☑ Documentation</li> <li>☑ IA Promotion</li> </ul>	iter □ Innovation Academy ☑ Workflow Manager □ Test

Figure 3-49 New / Edit User form

On that form the manager can Add new or Update existing user of the application. This form provides functionality for evidence / update of : user name, password, name and Surename of the user, role (manager or employee), selecting the company and selection from available projects that will be granted to that specific user.

The Back navigation button enables navigation to the previous form.

The Save button enables saving of performed changes in the form.

# 3.3.5 Reports

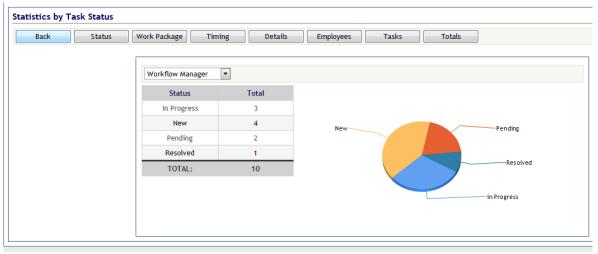
With pressing of the "Users" button from the main toolbar of the managers default page,(Figure 3-50)

[	Projects	Schedule	Users	Reports	Options	
		<b>-</b> : 0.4		or of the men		

Figure 3-50 Main toolbar of the managers default page

the user can navigate to the "Reports" form (Figure 3-51)





### Figure 3-51 Reports form

The form provides a toolbar (Figure 3-52) with following buttons:

- Status functional button for running of the Task Status Reports sub page
- Work Package functional button for running of the Work Package Reports sub page for providing reports related with work packages
- Timing functional button for running of the Timing sub page for providing reports related with the time spent on specific project phase.
- Details functional button for running of the Details Report sub page for providing reports related with the weekly presentation of time spent on specific project phase for specific project.
- Employees functional button for running of the Employees time schedule report
- Tasks functional button for running of the Tasks sub page for providing reports related with the weekly presentation of time spent on specific task
- Totals functional button for running of the Totals for the planned / spent time for each Employee.

Back	Status	Work Package	Timing	Details	Employees	Tasks	Totals
					_		

Figure 3-52 Toolbar of the Reports Form

# 3.4 **Employee related functionalities and activities**

# 3.4.1 Main page of the employee - My tasks

After manager logs in (explained in section 3.2 - User authorization and profile User Authorization) the default page is shown as in the Figure 3-53. The default page has



- a "To Do" section that lists tasks that should be done,
- Toolbar with 3 buttons for additional functionalities
- several dropdown fields that are used as a filter for displaying tasks
- grid with tasks related data
- status and record navigation bar

х р r	۷ <mark>۵</mark> j e c	t management	Ιννον	ATION ACADEMY					Ĭ
٩y	Tasks	5							
<b>v</b> 1	To-Do:	Pending:2 In Progress:6						Si	uggestions
All	projec	ts 🔹 All packages 💌 All statuse: 💌 Search	Suggestion My	Schedule					
	ID	Subject	Project	Work Package	Assigned By	Schedule	Deadline	Priority	Done
•	140	SW design	Workflow Manager	Other	Manager lacademy	21.02.2011	25.02.2011	***	80%
	139	User manual	Workflow Manager	Other	Manager lacademy	23.02.2011	25.02.2011	***	80%
2	138	Technical specification	Workflow Manager	Other	Manager lacademy	22.02.2011	25.02.2011	***	25%
•	137	DB optimization	Workflow Manager	Tasks	Manager lacademy	21.02.2011	25.02.2011	***	50%
•	134	Task 1 za testiranje	Workflow Manager	Tasks	Branko Mngr Djurovic	11.02.2011	15.02.2011	**	80%
•	132	Request	Innovation Academy	Technical specification	Marjan Gushev	09.02.2011	10.02.2011	****	50%
2	130	Tekstovi za Innovation web	Innovation Academy	Testiranja	Marjan Gushev	14.02.2011	15.02.2011	**	100%
•	128	Understanding technical documentation	Innovation Academy	Testiranja	Marjan Gushev	07.02.2011	08.02.2011	***	50%
2	126	New tenders	Innovation Academy	Tenderi	Marjan Gushev	11.02.2011	11.02.2011	****	100%
	123	New tenders	Innovation Academy	Tenderi	Marjan Gushev	08.02.2011	11.02.2011	****	80%
ы		of 2  Page size 10		Total: 18 🌧 New	: 0 🖏 Pending: 2 🐽 In Pro	ogross: 6 🚗 R	esolved: 4 @	Closed: 6 😋	Rejected:

Figure 3-53 My tasks

Using the Toolbar with 3 buttons for additional functionalities the employee has the functionalities to search within his tasks, to navigate to the page for generating suggestions and to navigate to a page for preview of his own schedule as presented on Figure 3-54. Optionally the employee can define a new task but on behalf of his manager.

Search	Add task	Suggestion	My Schedule
Eiguro 2	54 Toolbar of	fomplovoos' fur	octionalities

Figure 3-54 Toolbar of employees' functionalities

To be able to see different sets of tasks the user can make a filtration throughout provided drop down lists as presented on the Figure 3-55. There are three Drop down fields for selecting project, workpackage and task statuses.

Workflow Manage 💌 All packages 💌 All statuse: 💌	Search
---	--------

Figure 3-55 Drop down list



On the default page there is a grid with tasks related data (Figure 3-56). In row there are information about:

- Task Status
- Task Id
- Task subject
- Project name
- Work package name
- Who has assigned the task
- Task schedule (start date)
- Task deadline (end date)
- Task priority
- Percentage of task completion (Done)

	ID	Subject	Project	Work Package	Assigned By	Schedule	Deadline	Priority	Done
٠	140	SW design	Workflow Manager	Other	Manager lacademy	21.02.2011	25.02.2011	***	80%
٠	139	User manual	Workflow Manager	Other	Manager lacademy	23.02.2011	25.02.2011	***	80%
2	138	Technical specification	Workflow Manager	Other	Manager lacademy	22.02.2011	25.02.2011	***	25%
•	137	DB optimization	Workflow Manager	Tasks	Manager lacademy	21.02.2011	25.02.2011	***	50%
٠	134	Task 1 za testiranje	Workflow Manager	Tasks	Branko Mngr Djurovic	11.02.2011	15.02.2011	**	80%
•	132	Request	Innovation Academy	Technical specification	Marjan Gushev	09.02.2011	10.02.2011	****	50%
0	130	Tekstovi za Innovation web	Innovation Academy	Testiranja	Marjan Gushev	14.02.2011	15.02.2011	**	100%
•	128	Understanding technical documentation	Innovation Academy	Testiranja	Marjan Gushev	07.02.2011	08.02.2011	***	50%
0	126	New tenders	Innovation Academy	Tenderi	Marjan Gushev	11.02.2011	11.02.2011	****	100%
•	123	New tenders	Innovation Academy	Tenderi	Marjan Gushev	08.02.2011	11.02.2011	*****	80%

Figure 3-56 Grid with tasks related data

On the bottom of the grid there is legend with the meaning each sign of the task status accompanied with information how many tasks are with a specific status (Figure 3-57).



Figure 3-57 Legend with the meaning each sign of the task status

Bellow the grid there is a Record navigation bar as presented on the figure bellow (Figure 3-58)



Figure 3-58 Record navigation bar

### **3.4.2 Updating a task**

From the main page the user can access a "Task Preview" page by pressing a mouse button on the record of a specific task. The page that is opening is presented on Figure 3-59.



On the Task Preview page there is a toolbar with three functional buttons:

- Back to navigate on the previous page
- Edit to navigate on a page for updating a status and execution of a task
- Cancel to cancel all changes

On this page the user can see all task related data.

Through this form the user can see all task related data such as:

- Project project name
- Work package a work package related with the project
- Title field with the title of the task
- Description field for description of the task
- File field for attached document for the specific task
- Priority Field that indicates the priority of the task
- % Done percentage of completeness of the task
- Assigned by Who has assigned the task
- Recurrent Field that indicates if the task is recurrent
- Predecessor field that indicates predecessor of the task
- Successor field that indicates successor of the task
- Start and End date of the task
- Assigned to field that indicated to whom this task is assigned
- Schedule planned schedule for all assigned employees for the period of performing of the task
- Performed actual work on the task performed by employees
- Monitoring Field that indicates who is monitoring the performance of the task
- Timing a table that indicates how long the task vas in different status



Back	Edit	Cancel						
Project	BRS		Status	In Progress		% D	one 50%	Start date 5/4/2011
Module	Module 2		Priority	rity High		Assigned	l By Marjan Gusev	End date 5/9/2011
Subject	Test od employ	зе						
Problem Description	Test od employ	е						
File	503-1347-inova	tion_znak.gif		Recurrent				
Predecessor No predecessor				Successors Light version				
Assigned To	Pano Gushev	AName ASurN	ame 🗹 Nikola N	acov 🗌 John Joh	าทร			
Schedule	Wed (4/	5) Thu (5/5)	Fri (6/5)	Mon (9/5)				
Pano Gushev	0	0	4	2				
Nikola Nacov	8	4	0	2				
Performed	Wed (4/	5) Thu (5/5)	Fri (6/5)	Mon (9/5)				
Pano Gushev	2	2	4	4				
Nikola Nacov	0	0	0	0				
Monitoring	Manager3nd	Manager3nsd 🗹	AName ASurNam	e 🗌 John Johns				
	New	Pending	InProgress	Resolved	Rejected	Closed	]	
Timing	4/28/2011 2:05:01 AM	5/25/2011 12:47:52 PM	5/25/2011 4:01:05 PM					
History								

Figure 3-59 Task Preview page

With pressing of the EDIT button in a "Task Preview" page (Figure 3-59), the user is navigating on the "Edit Task" page (see Figure 3-61) where it is allowed to update task status and information.

On Edit Task page (see Figure 3-61) there is a toolbar with four functional buttons:

- Back to navigate on the previous page
- Save save the changes
- Cancel to cancel all changes
- Forward to forward the task to another person
- Clarification to navigate on a page for asking a clarification from the manager

Depending on the task status the presentation of the Edit Task page is different. In general the user employer can see following task related data

- Project project name
- Work package a work package related with the project
- Title field with the title of the task
- Description field for description of the task
- File field for attached document for the specific task
- Priority Field that indicates the priority of the task
- % Done percentage of completeness of the task
- Assigned by Who has assigned the task



- Recurrent Field that indicates if the task is recurrent
- Predecessor field that indicates predecessor of the task
- Successor field that indicates successor of the task
- Start and End date of the task
- Assigned to field that indicated to whom this task is assigned
- Schedule planned schedule for all assigned employees for the period of performing of the task
- Performed actual work on the task performed by employees
- Monitoring Field that indicates who is monitoring the performance of the task
- Timing a table that indicates how long the task vas in different status

When the task is in status pending the user (employer) can enter the response that have accept the task and the user can change the status from pending into "in progress" (Figure 3-60)

Back	Save		Cancel	Forward	Clarifi	ication								
						_	Start date 5/27/2011							
Project					Pending	-	% Done							
Workpackage				Priority	Normal		Assigned By	Marjan Guse	v End date 6/1/2011					
		ing a new pre												
oblem Description	A pres	entation for	the new prod	luct should			2							
					100	Select File								
File	No file	es attached			Recurrent									
Predecessor					Suc	cessors N	lo successors		Light version					
Assigned To	Pano Gushev AName ASurName Nikola Nacov John Johns													
Schedule		Fri (27/5)	Mon (30/5	i) Tue (3	1/5) We	d (1/6)								
Pano Gushev	Pano Gushev 2 2					2								
Performed		Fri (27/5)	Mon (30/5	i) Tue (3	1/5) We	d (1/6)								
Pano Gushev		0	0	0		0								
Monitoring	Ma	anager3nd Ma	anager3nsd	AName AS	urName 🗔 J	ohn Johns								
	1	New	Pending	InProgre	ss Reso	olved	Rejected	Closed						
Timing		7/2011 8:11 PM												
Response														
History														

#### Figure 3-60Task Edit page during pending status

When the task is in status "in progress" the user (employer) can enter the evidence of the task execution in section "Performed dates" where the following information can be added

- Schedule date date when some activities are performed
- Time spend period of time spent on the task



- Statement - statement of work

When the task is finished the user can change the status from "In Progress" into "Resolved" (Figure 3-61)

Back	Save	Cancel	Forward	Clarification									
Project	BRS		Status Ir	Progress 💌	% Doi	ne 50	Start date 5/27/20	111					
Workpackage	Module 1		Priority No	rmal	Assigned	By Marjan Gusev	End date 6/1/201	2011					
Subject	Creating a new	presentation											
oblem Description	A presentation	for the new pr	oduct should be c	reated									
				🖹 Select File	1								
File	No files attach	ed		Recurrent									
Predecessor				Successors	No successors	L	Light version						
Assigned To	Pano Gusher AName ASur Nikola Nacor John Johns	Name											
Schedule	Fri (27	(5) Mon (3	0/5) Tue (31/	5) Wed (1/6)									
Pano Gushev	2	2	2	2									
Performed	Fri (27)	(5) Mon (3	)/5) Tue (31/	5) Wed (1/6)									
ano Gushev	2	2	2	2									
Performed dates	5/30/2011 5/31/2011 6/1/2011	2 h.	statement of the	activities for the data	ay 3			If this task is dedicated to another employee too, do not change the status to resolved until the other employee fulfull this form!!!					
other date	6/2/2011	h.						Add					
Monitoring	Manager3nd	Manager3nsd	AName ASurN	ame 🗌 John Johns									
	New	Pending	InProgress	Resolved	Rejected	Closed							
Timing	5/27/2011 12:38:11 PM	5/27/2011 1:55:28 PM	5/27/2011										
History	Pano Gushev Status - Pend	5/27/2011 1: ling	55:28 PM	Response in pendin	g status								

Figure 3-61 Task Edit page during in progress status

When the task is in status resolved (Figure 3-62) the user can enter final information about the task:

- Statement of Work
- Defect reason
- Response



With pressing on the save button the user confirms that the task is resolved. Now the manager should approve or reject the task.

Back	Save		Cancel	Forward	Clarification		ì
			Cancet				
	ct BRS			Status		% Don	
Workpackag				Priority No	ormal	Assigned B	y Marjan Gus
		ng a new pr					
blem Descriptio	n A prese	entation for	the new prod	uct should be (			
					🔋 Select Fil	le	
Fi	le No file	es attached			Recurrent		
Predecess	or				Successors	No successors	
Assigned 1	o ANa	o Gushev ame ASurNa ola Nacov n Johns	ime				
Schedule		Fri (27/5)	Mon (30/	5) Tue (31	/5) Wed (1/6)		
Pano Gushev		2	2	2	2		
Performed	ł	Fri (27/5)	Mon (30/	5) Tue (31	/5) Wed (1/6)		
ano Gushev		2	2	2	2		
Monitorin	IR V Mar	nager3nd M	anager3nsd	AName ASurN	lame 🗌 John Johns		
	_	lew	Pending	1	1	Rejected	Closed
Timir				InProgress	Resolved	Rejected	Closed
	- J/2	7/2011 3:11 PM	5/27/2011 1:55:28 PM	5/27/2011 1:56:51 PM			
	staton	nent of worl	L.			1	
	staten	ient of worl	n.				
Statement of wo	k						
	defect	reason					
Defect reaso	n						
Time sper	d 8	hours					
	respon						
	respon	isel					
Respons	e						
						//	
Histo		Gushev 5. s - Pending	/27/2011 1:5	5:28 PM	Response in pendi	ng status	
	statu	o · rending	5				
Back	Save	Cai	ncel	Forward	Clarification		

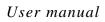
Figure 3-62Task Edit page during in resolved status

### **3.4.3** Providing a suggestion to the manager

From the main page (Figure 3-53) the user can access a "New Suggestion" page by pressing on the Suggestion button on toolbar (Figure 3-63).

2 62 Toolbor of o	
Suggestion	My Schedule

Figure 3-63 Toolbar of employees' functionalities





### The page that is opening is presented on

Back	Add Cancel
se complete the form	n below. This report will be logged and sent to the management team on a high priority basis through the management system.
Title	The title of a new suggestion
Description	Description of a suggestion.
Assigned To	🗹 Branko Mngr Djurovic 🗖 Marjan Gushev 🗖 Manager Iacademy
0	🗖 Pano Gushev 🗐 Proba Proba 🗷 Test Employee 🗐 Kristina Kolic 🗐 Igor Ilievski 🗐 Nikola Nacov

#### Figure 3-64.

Back	Add Cancel
ase complete the form	n below. This report will be logged and sent to the management team on a high priority basis through the management system.
Title	The title of a new suggestion
Description	Description of a suggestion.
Assigned To	🕼 Branko Angr Djurovic 🗐 Marjan Gushev 🗐 Manager Iacademy
Monitoring	🗖 Pano Gushev 🗖 Proba Proba Proba 🗹 Test Employee 🗖 Kristina Kolic 🗖 Igor Ilievski 🗖 Nikola Nacov

#### Figure 3-64 Preview of Suggestions page

On the New Suggestion page the user can find a toolbar with three functional buttons:

- Back to navigate on the previous page
- Add to confirm creation of a new suggestion
- Cancel to cancel the entrance

Under the toolbar the user can enter information about the new suggestion that will be forward to attention to the manager or the person that it is assigned to:

- Title a title of a new suggestion
- Description description of the suggestion
- Assigned To a list of check boxes that indicate to whom the suggestion is assigned to



- Monitoring - a list of check boxes that indicate who should monitor the information related with this suggestion.

When the suggestion data are entered the user can confirm the entrance with pressing of the Add button.

# 3.4.4 Preview of the personal schedule

From the main page (Figure 3-53) the user can access a "My Schedule" page by pressing on the My Schedule button on toolbar (Figure 3-65).

Suggestion	My Schedule

Figure 3-65 Toolbar of employees' functionalities

The page that is opening is presented on Figure 3-66.

Back All projects		▼ Star	t Date	2011-02	-01	End Dat	e 2011	-02-20												
Subject	1.2	2.2	3.2	4.2	5.2	6.2	7.2	8.2	9.2	10.2	11.2	12.2	13.2	14.2	15.2	16.2	17.2	18.2	19.2	20.2
Nabavka na tender		2																		
Initial understanding		6																		
Skype meeting Cellent				2																
Meeting			8																	
Possible partners							4	4												
New tenders							1													
New tenders								1												
New tenders									1											
New tenders										1										
New tenders											1									
New tenders														1						
Understanding technical documentation							1	3												
Tekstovi za Innovation web														4	4					
Request									6	4										
Task 1 za testiranje											2			2	2					

Figure 3-66 Personal schedule of employee

On this page the user can see a functional button:

- Back to navigate on the previous page
- Filter to obtain a presentation of personal schedule for all or specific project
- Date filter to obtain a presentation of personal schedule for specific period of time between Start date and End Date

The grid that is located under the toolbar presents engagement of the employee on a daily base expressed in hours, for each task.



At the bottom there is a summary record that presents total daily engagement for all tasks.