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User Manual for the eBMS Platform

Welcome to the eBMS Platform user manual. This manual is designed to assist the user in their day to day use of the system.

What is eBMS?

The eBMS Platform is a comprehensive, uniquely customizable, web-based process management framework. It has been successfully used for contract management, customer relationship management, incident and hazard reporting and investigation, project management, and much more.

Systems built on eBMS share an underlying platform that includes features such as advanced workflow, scheduling, permissions and business intelligence. This 'automatic' inclusion of advanced features allows us to package comprehensive systems at a low cost.

The platform is available either as a hosted solution, or installed onto servers managed by our customers, as needed.

How can eBMS help me?

eBMS helps organisations to automate management processes in an affordable and effective way. You might have a number of ‘unstructured’ or ‘informal’ processes which reside in paper or spreadsheet based systems.

You may even have an old legacy system which is too expensive to upgrade and are looking for an alternative solution. eBMS uses a highly flexible and innovative web based software (The eBMS Platform) to automate processes.

The features of our web based platform will help you to:

Do more with less effort and at a higher quality
Conduct affordable process automation
Implement rapid & robust process automation
Become better organised
Makes your organisation more agile
Drive & implement process improvement
Make better decision, faster

Key features include:

Highly flexible platform that can be tailored to your needs
Dashboard & Flexible Reporting
Management of Workflow requirements
Automated reminders & Communication
Easy to integrate with other systems
Flexible reporting for all your Business Information needs

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The Basics

Here we will learn about some of the core concepts and terminology associated with the platform.

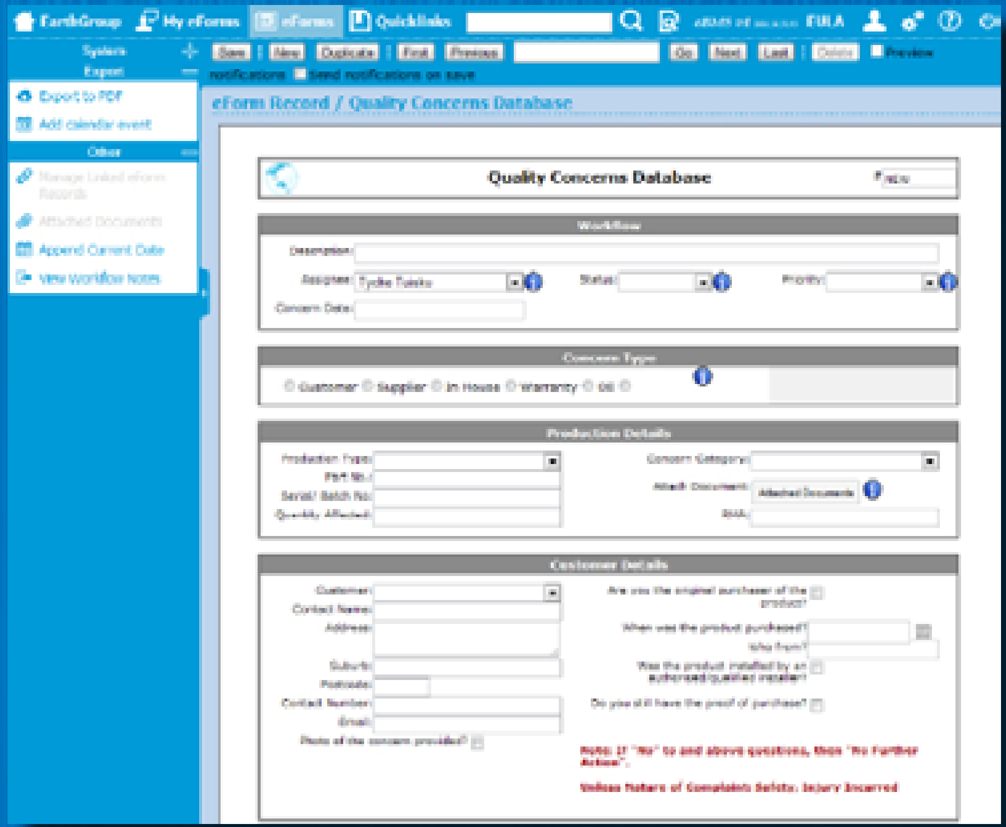
Terminology /eForms

The eBMS platform has a number of unique terms and concepts associated with this system. In this section we will discuss these terms.

eForms

eForms are the most essentual part of the eBMS system. They contain all your data, forms, processes, everything. You will use eForms to input new data into the system, view statistics and navigate the platform.

eForms are the building blocks of the eBMS platform!



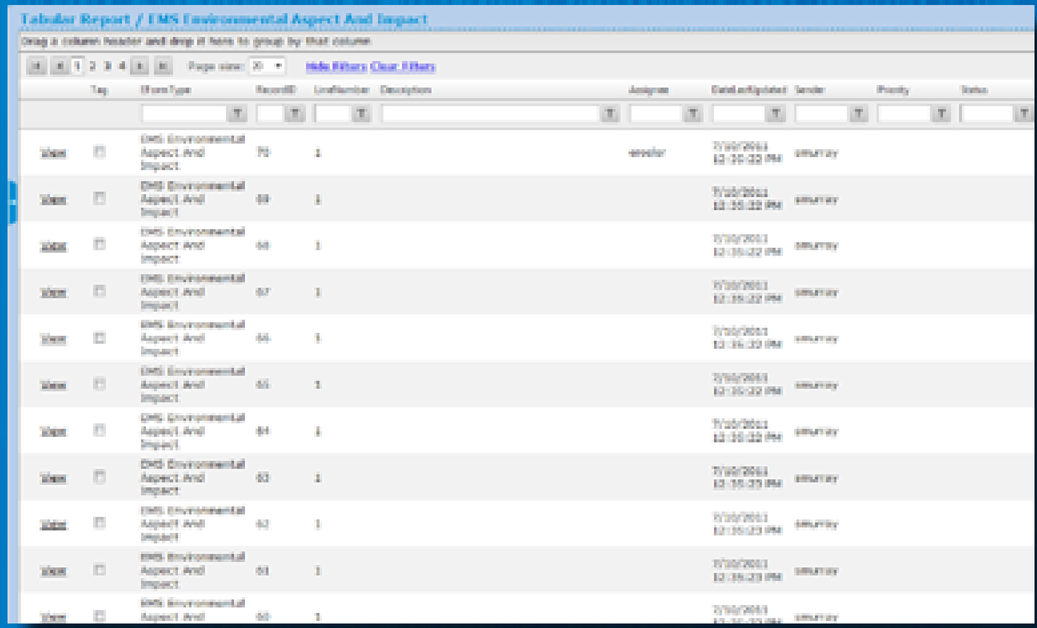
An example of a typical eForm.

Terminology /Records

Records

An eForm acts as an input template. When you input data into an eForm, a new eForm record is created holding the actual information. These eForm Records are attached to the eForm.

Think of each eForm as a folder, and the eForm records as the pieces of paper within the folder, which hold the actual information.



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Terminology /Portals

Portals

Portals are intended to help you navigate around your system. Portals contain links to all aspects of the system and are intended as your starting point when navigating or using the system.

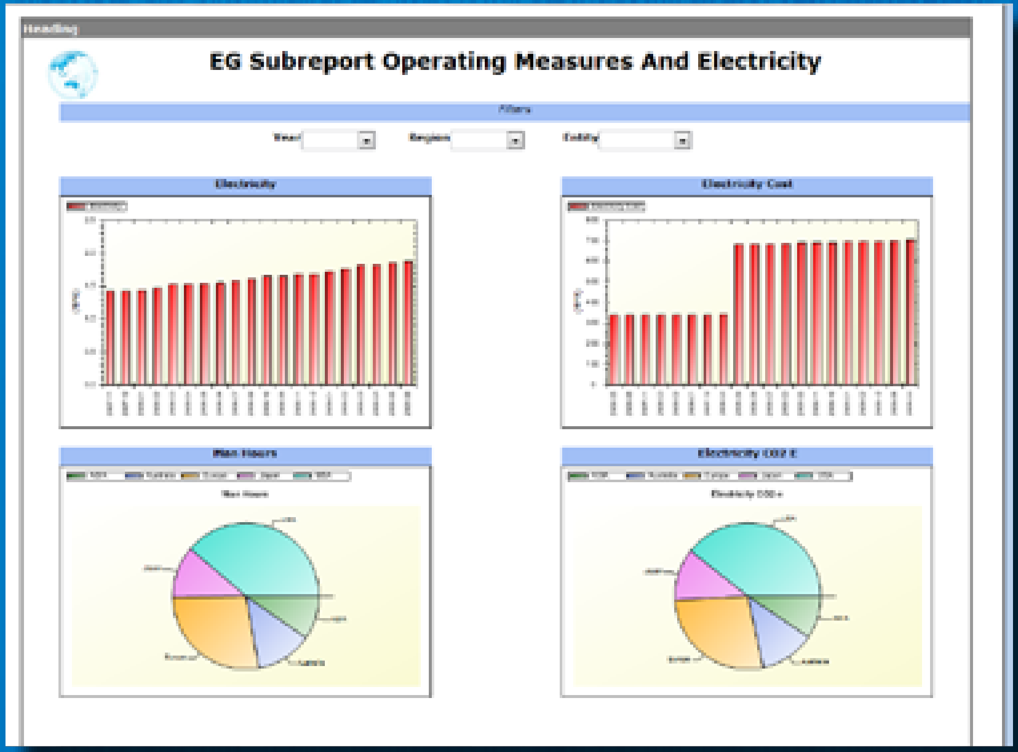
Your home portal is found using this button

The Home portal page from the earthgroup system.

Terminology /Dashboards

Dashboards

A dashboard shows a overview of data compiled from a range of records. This is generally used for viewing overall statistics from the system. For instance statistics on how many customers you have had each month. And average revenue per customer.

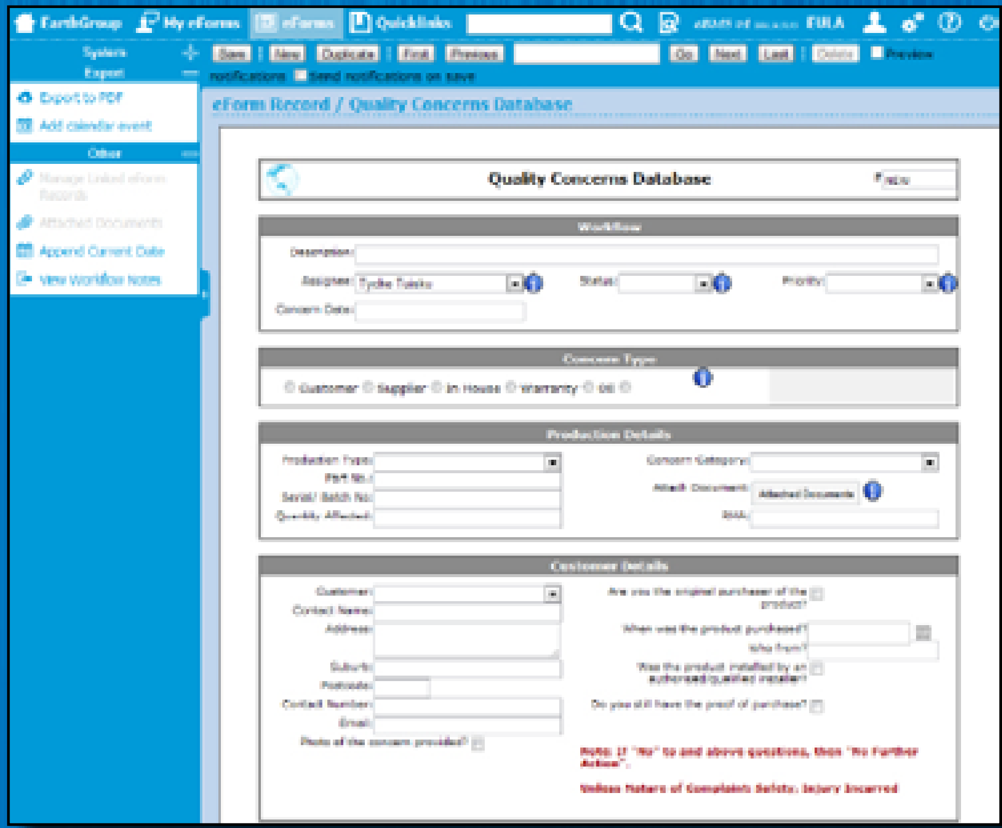


A dashboard showing amounts of different types of customer.

Terminology /Data Entry Forms

Data Entry Forms

Data entry forms are the most common type of form in the eBMS platform. These forms are how most data in input into the system.



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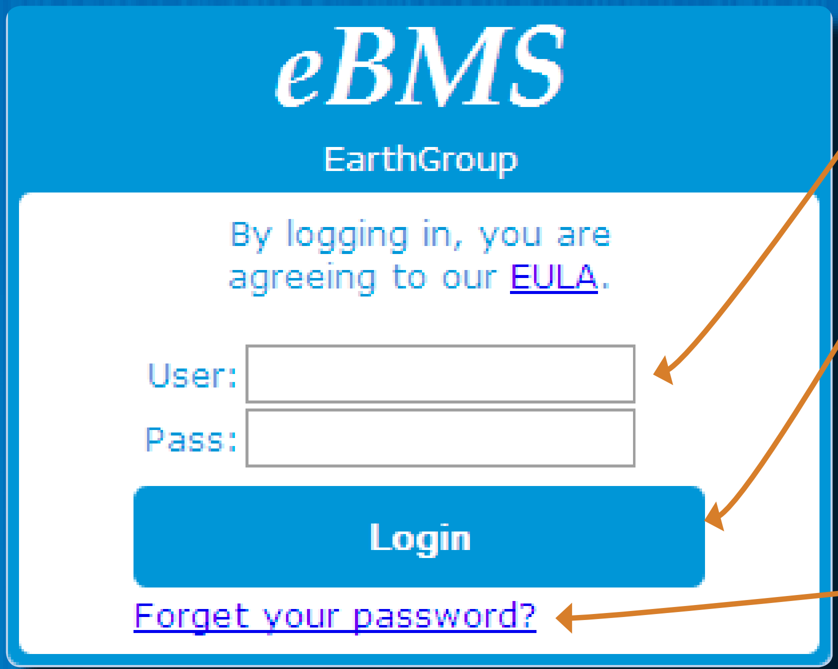
Let’s Get Started!

Now that we understand some of the basics it’s time to start using the system.

Logging In

When you open your eBMS web-page to start a session, a pop-up box will appear requesting your log in information (username and password).



The Home portal page from the earthgroup system.

To Log In

- Simply type your username and password into the appropriate boxes.
- Then click Login to enter the system.

If you cannot remember your password; click the "Forget your password?" button to have a new one emailed to you.

Main View

Top Panel:

This is the Top Panel. This is the navigation bar of the eBMS platform. It consists of these links:

A) The Main Page: The Main page acts as your home page for the eBMS platform. Here you will find your systems home page.

B) My eForms: My eForms contains a list of all eForms which are currently assigned to you.

C) eForms: eForms contains a list of all eForms within the platform.

D) Quicklinks: Contains links to any websites or files relevant to the system. This may include user manuals, company or partner websites.

E) Search Functions: Use this to search eForms, eForm records and quicklinks using keywords

F) Account Settings: Use this to manage your username to the system. You can use this to change your username, email or password.

G) Control Panel: Here you will find system wide settings for the platform. The average user should never need to go here.

H) Help: Go here for details instructions on how to use various parts of the eBMS platform

I) Log Off: When you have finished using the system, use this to log off

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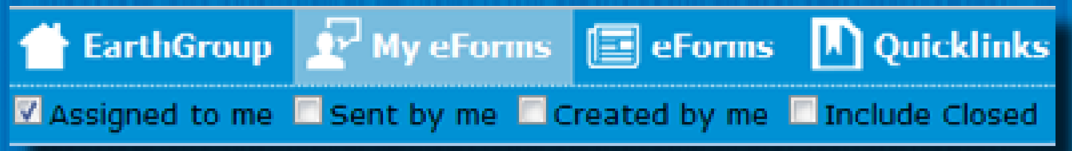
My eForms

My eForms is an important part of eBMS platform workflow. Here you can view and access all eForms which are currently assigned to you.
If you open an eForm or another user assigns an eForm to you it will display here. Likewise, if you assign an eForm to another user it will appear in that users My eForms. For more infomation on workflow see 'Workflow'



Assigned to me: View only the eForms that you have been assigned.

Sent by me: View only the eForms that you have sent.

Created by me: View all the eForms you have created.

Assigned to me: View only the eForms that you have been assigned.

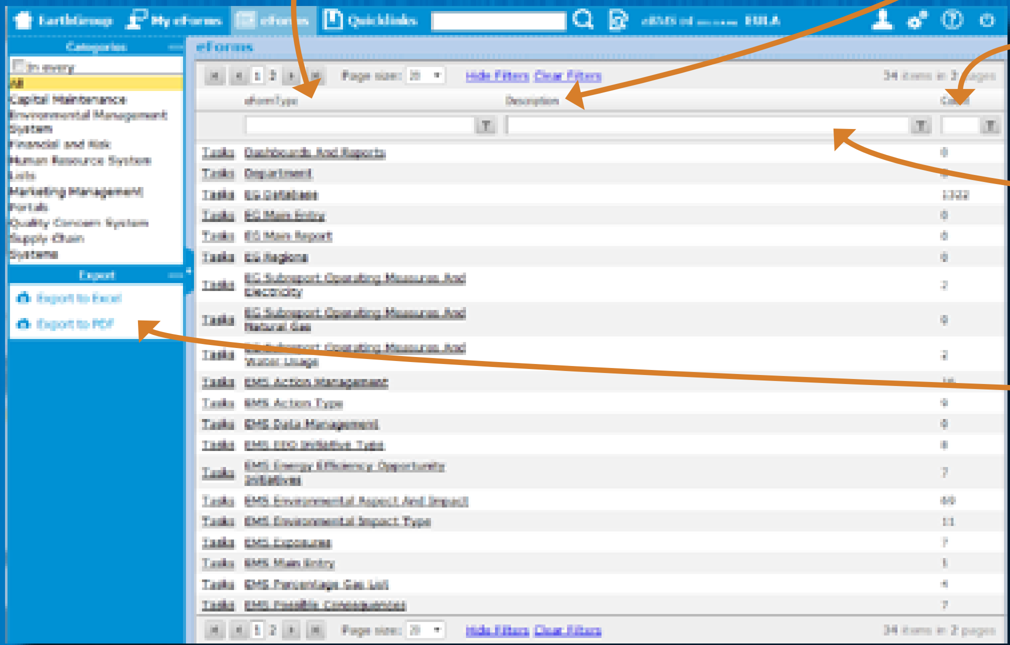
View: Clicking on View will bring up the eForm record to add data to it.

eForms

Here you can view and search a list of all the eForms that have been created. In addition to this, you can perform various tasks such as: Add data to a current eForm record, make a tabular report, make a charting report, create or edit an eForm template, or update a description.

1. eForm Type: This is the name of the eForm. Clicking on the name takes you to 'Tabular Report.'

2. eForm description: Clicking on the Column header 'description' sorts the eForms into description, alphabetically.

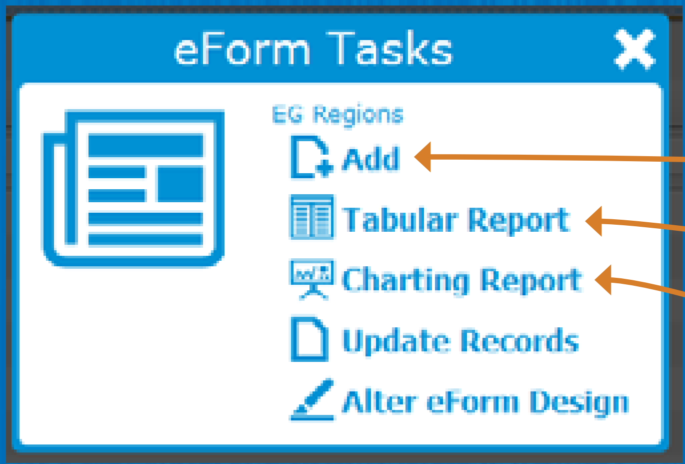


3. Count: This shows how many records exist for a particular eForm

4. Filters: By typing in the eForm name or description box, you can narrow your search for a particular eForm.

5. Excel/Pdf Icons: The Excel icon allows you to export the list of eForm names (what you see before you) to an Excel spreadsheet. The PDF icon allows you to send the list of eForm names to a PDF.

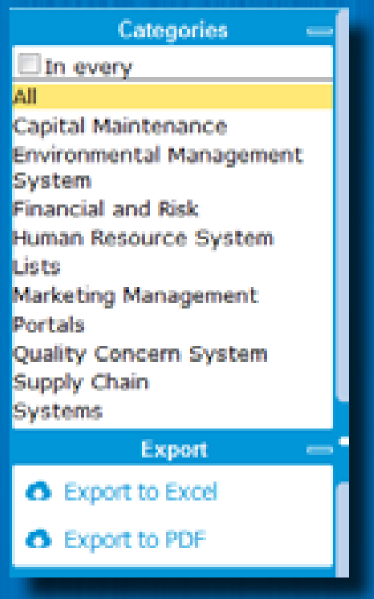
eForms



Choose a task by simply clicking on the word “Tasks” next to the eForm you want. You will then be prompted with the “eForm Tasks” pop up, listing the different actions you can now take.

- Use the add button to open a new eform.
- Click to view a Tabular report on this eForm. See Tabular Report under Business Intelligence of this manual for more info.
- Click to view a Charting Report of this eForm. See Charting Report under Business Intelligence of this manual for more info.

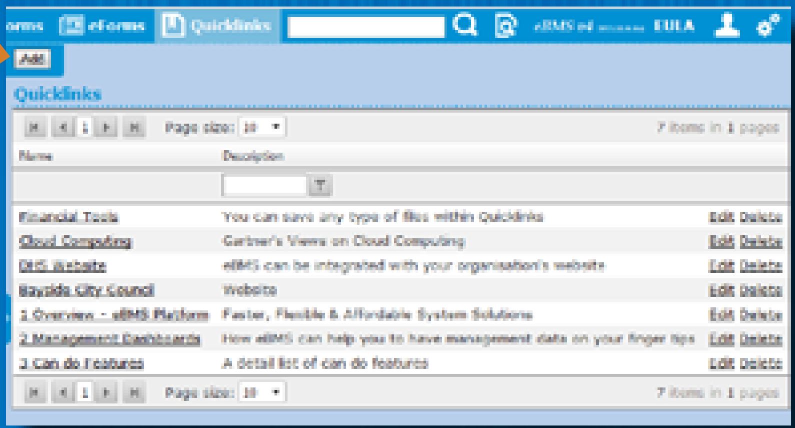
7. Categories: Most eForms are arranged into 1 or more categories. Selecting a category from the list will display only eForms which are part of that category. This is similar as to how an office would file the different facets of their business into a filing cabinet.



Quicklinks

Quicklinks are quite a simple tool, but very handy. In a nutshell, a quick link will direct you to a relevant website, a file that has been uploaded or a file on the company's network (local file).

To add a new quicklink, click on the "Add" button at the top of the page. This will then bring you to another screen.

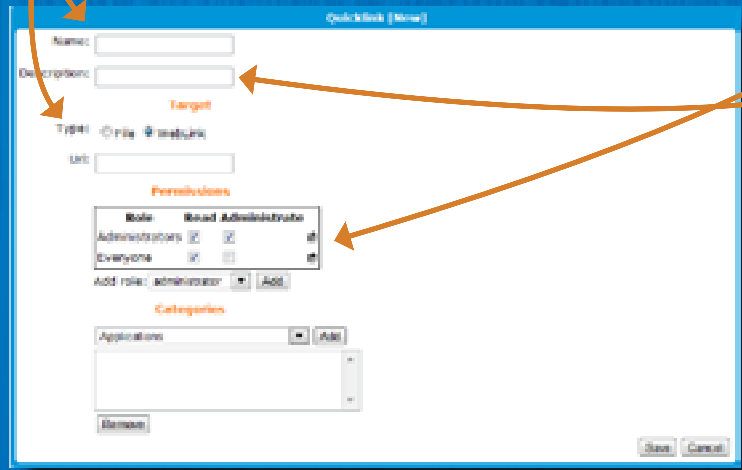


Name: The name of the Quicklink.

Description: You are always required to enter a description.

Type: Select whether you want to upload a file, or direct a user to a website.

Permissions: These are the users who have been assigned permission to use the Quicklink.



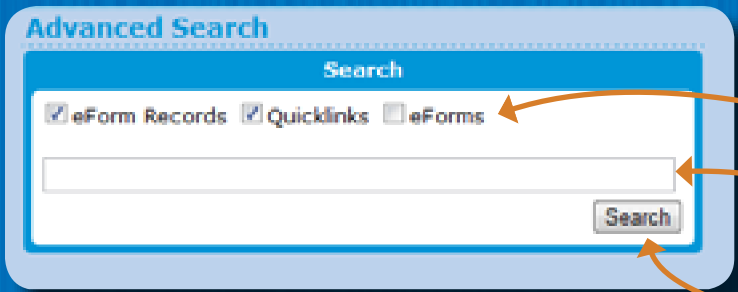
Search

The search function can be used to search eForm records, quicklinks and eForms for any term.

To perform a quick search simply type what you are looking for in the search box located in the top panel and click the search button.

This button takes you to the advanced search page.

The advanced search page gives you the option to search for any key word (such as name, description, etc) from any eForm record, Quicklink and eForm. Simply type in the keyword and select the eForm or Quick link you are searching for. You will be taken to a page listing the records that match your search criteria.



Choose where you would like to search

Enter what you would like to search

Then click Search!

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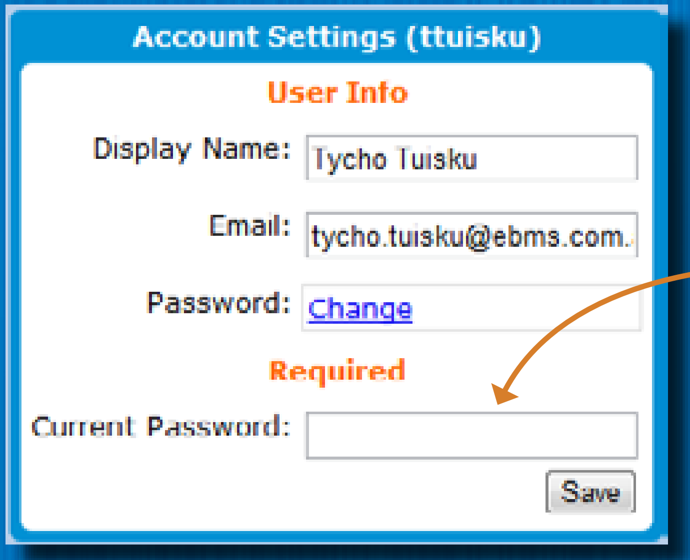
Account Settings

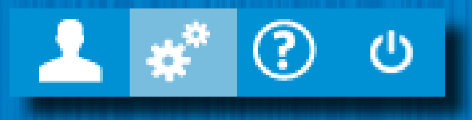


In the Account Settings page you can change your current display name, email address and password.

You are always required to enter your current password to make changes to your account

Control Panel

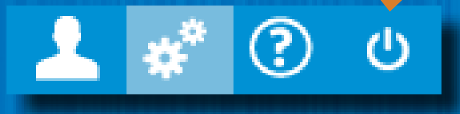
The third icon on the top right of the screen takes you to the system control panel. Here you can control the various aspects of administering the system.



Help

The help button (third icon on the top right of the screen) takes you to the eBMS help page. Click eBMS Version 4 Help for this system. You will be greeted with a help page which contains detailed instructions on how to perform various tasks within the eBMS platform.

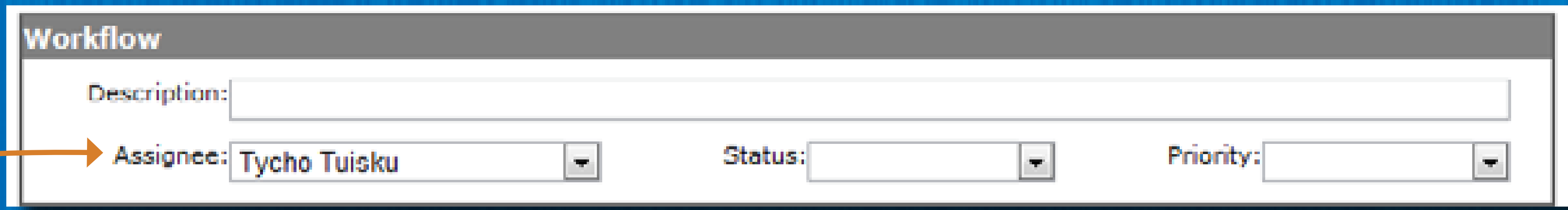
Log Off



The top right button logs you out of the eBMS system. Use this to leave the system when you have finished using it.

Workflow

Workflow is the first section in most eForms. This section shows an overview on the status of the current eForm. Workflow allows you to easily manage your current eForms, and pass them back and fowards with other users.



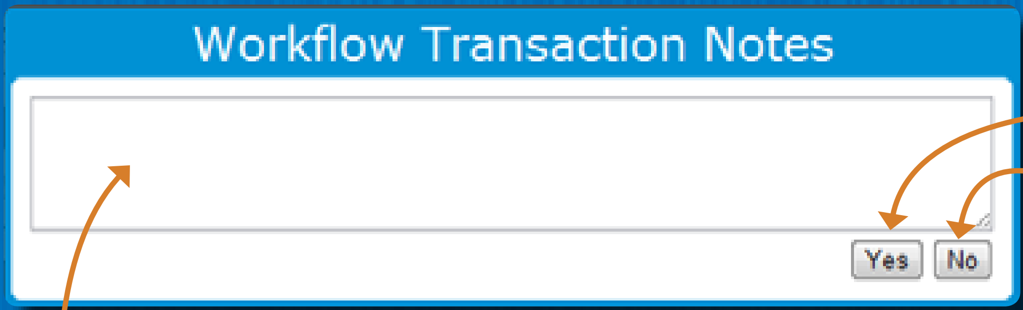
The Assignee allows you to set the person currently assigned to the eForm. When you are assigned to an eForm, this eform will show up in your My eForms list. If you are finished with the current eForm and need to pass it on to another user, simply change the assignee to that user and the eForm will appear in their My eForms and they will be notified.

The status sets weather the eForm is open and in progress or closed and completed. Closed eForms will not show up in any users My eForms.

Priority determines how urgently the current eForm needs attention. Higher priority eForms will obviously get attention from users above lower priority eForms.

Workflow

Workflow Transaction Notes are used on some eForms. Transaction notes allow you to send infomation to the next user of an eForm when the eForm is being assigned to a new user.



Click yes to save notes for the next user.

Click No to skip this step.

Enter your transaction notes for the next user here.

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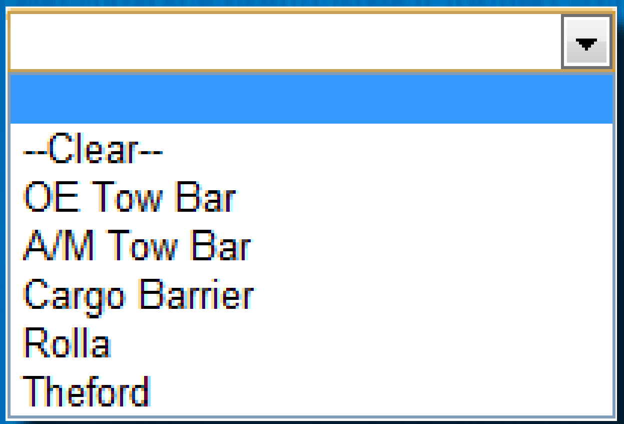
Data Entry

eForm Features

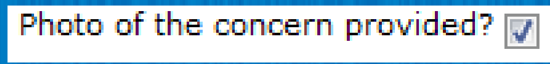
Collapsible Boxes
eForms are split up into sections. These sections can be expanded or collapsed based on your need. Simply click once on the heading of the box to collapse it. Click again to expand.

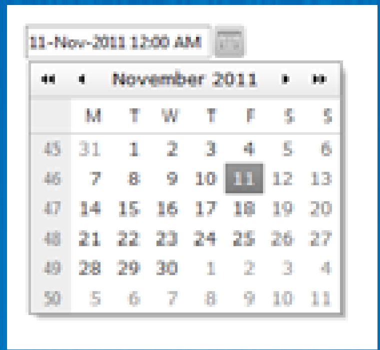


Drop Down Menus
Drop down menus are used to select from a pre existing set of data. Some drop down menus will only load their data when they are selected. These menus may take a few seconds to display and may show a large amount of data. You can type directly into these menus to filter results and help find the data you are looking for.

eForm Features

Tick Boxes
You can use Tick boxes to indicate yes or no to a stated sentence. For example; CEO approval received. Clicking the check box will indicate CEO approval has been received. Clicking again will indicate it has not.



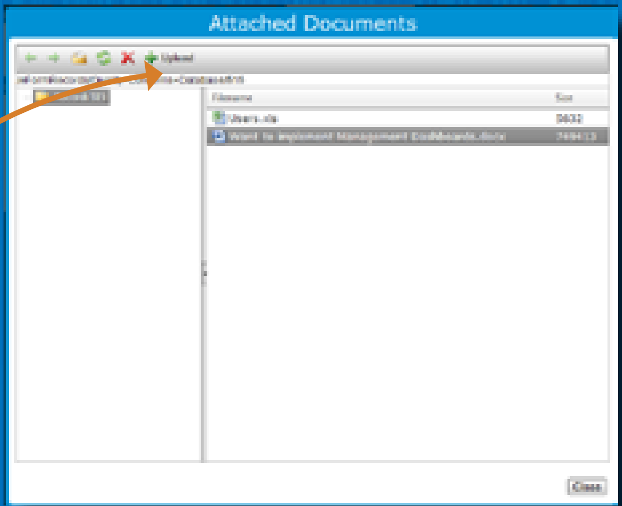


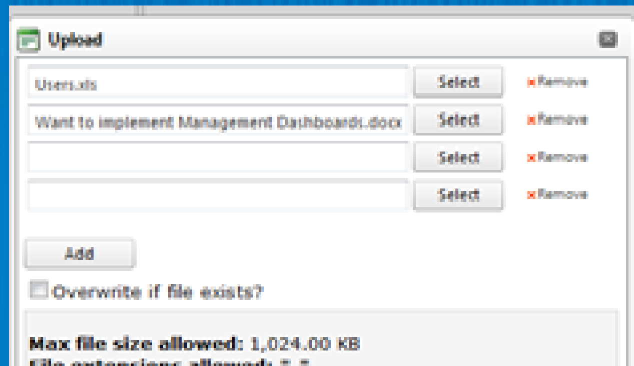
Date Picker
The date picker allows you to choose a date for the relevant context. Click on the date picker and a calender will appear. You can then scroll through the months and years to find the date you are looking for. Click a day to input that date. Some date pickers also support selecting a time. Click the time icon to open the time picker and select the time for the particular date.

Information Node
Many eForms contain information nodes. Information nodes contain information, instructions or any other information the user may need to know about specific aspects of the current eform. Simply mouse over or click an information node to read what it says.

eForm Features

Attached Document
The Attach document button allows you to attach a file or document to the current eform.
An eForm must have been saved at least once before you can attach a document





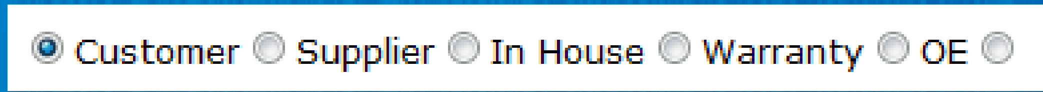
Clicking the Attach Document button will open a document manager.

Here users can upload new documents using the upload button and Delete documents using the red cross.

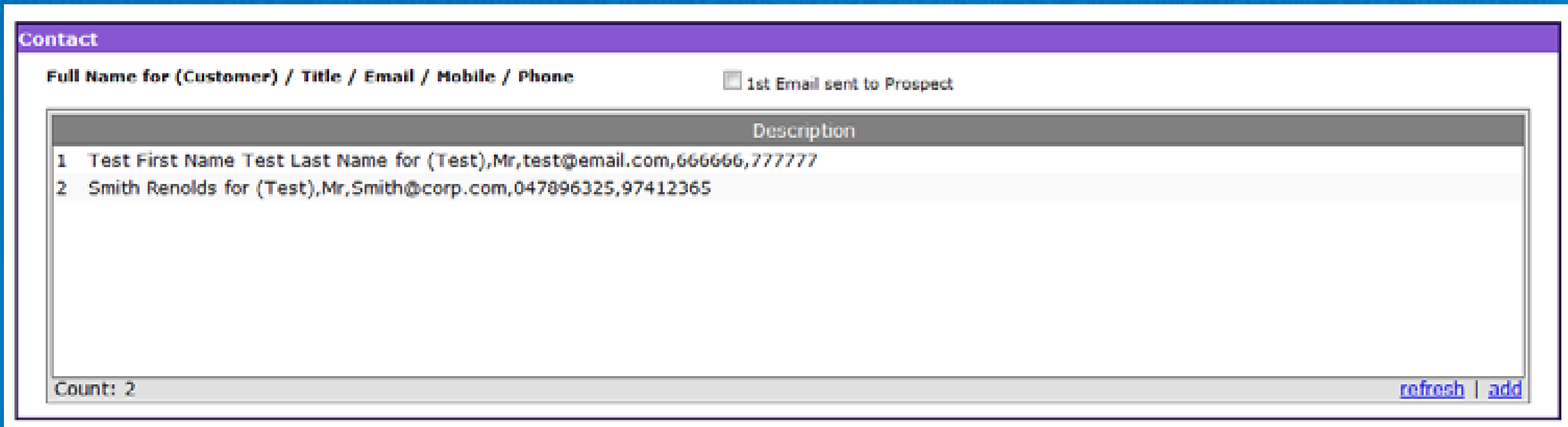
When you click the upload button you will be prompted with an upload file window. Press Select to choose the file you would like to upload. When you are done choosing files simply press Upload to begin the upload process.

eForm Features

Option Boxes
Use option boxes to select one of a number of different choices.



Use of linked eForm Tables
An eForm table displays a list of linked eforms. You can click on an eform from the list to view and edit it. Or click 'add' to create a new eform. Once you have finished with the new eform you must click refresh on the bottom right of the eform table to update the list of linked eforms and see view the new eform.



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Business Intelligence

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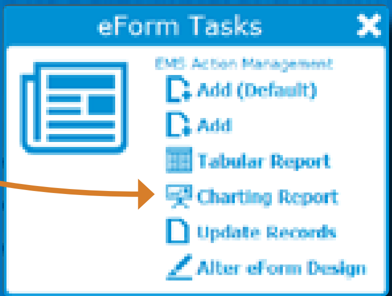
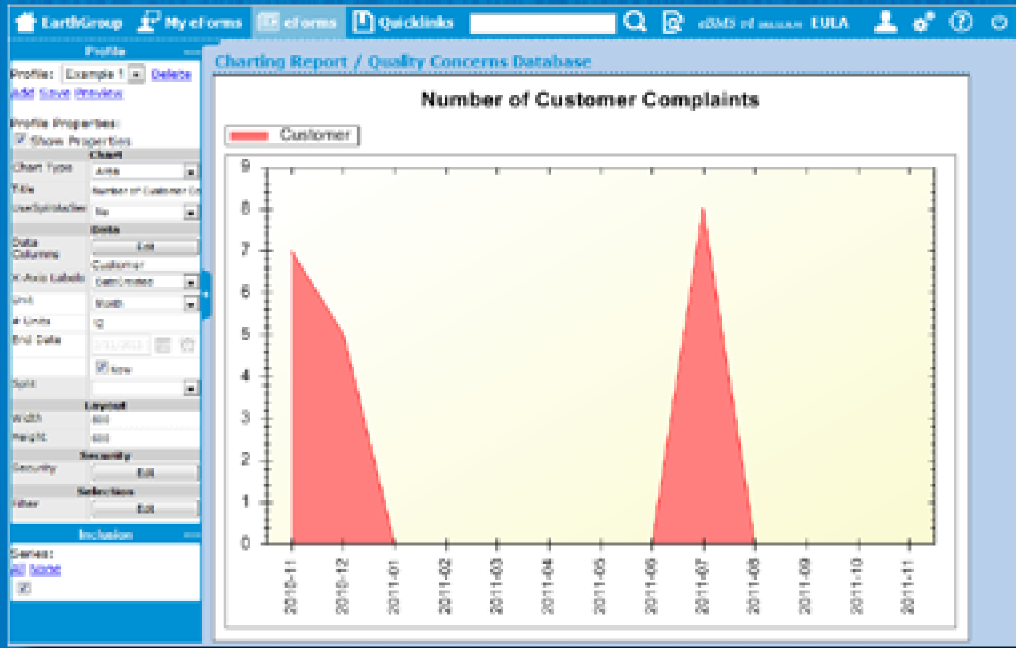
Charting Report

A Charting Report allows administrators and users to graphically view data for a particular eForm. This data may be things like customer complaints over time, how many different categories of eForms are currently open, or many other types of report.

To get to a Charting Report, click on the eForms tab at the top of the page.

Then locate the eForm of interest and and click the word “Tasks” and select “Charting Report”.



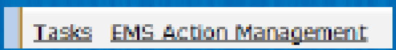


Tabular Report

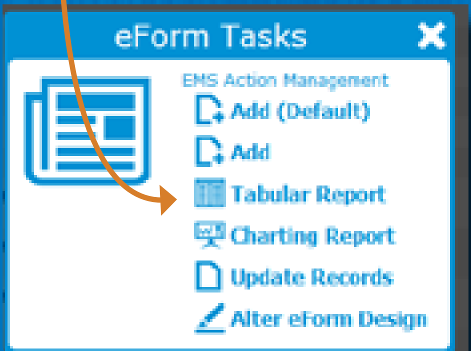
A Tabular Report is used to view the individual records contained within a particular eForm.
This page shows the latest 20 records, by default, that have been created.

To view a Tabular Report goto eForms.

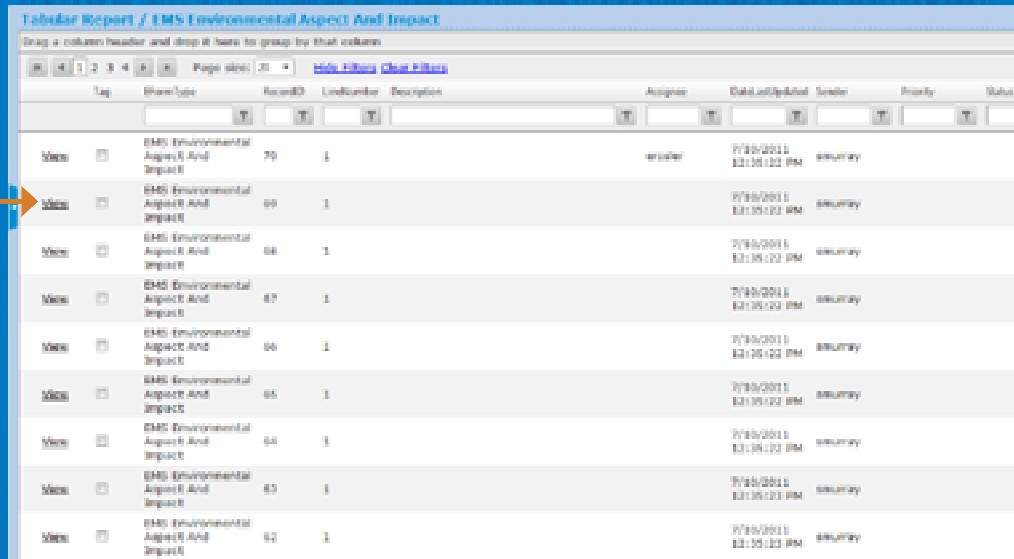
Then click on tasks next to the eForm you are interested in.



Then select Tabular Report



Click on "view" to then go to the record itself.

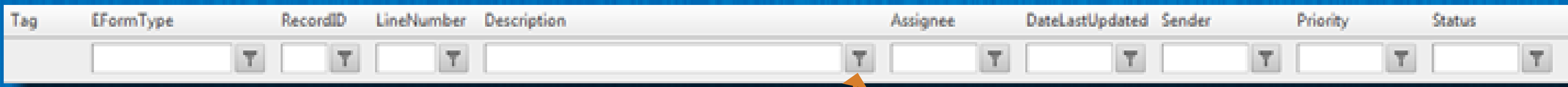


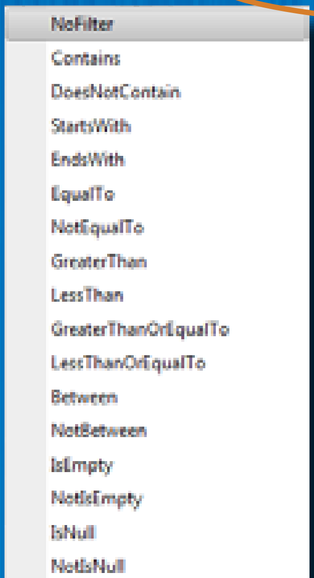
Tabular Report /Filtering

Filtering

Once you are viewing a report of an eForm you can filter the results by certain information.

Along the top of the report is the filter bar





Enter the information you would like to filter by into the relevant text boxes.
These are your filters.

This is the filter button. Click this button to display a list different filter methods.

The filter methods define how this filter filters.

So if you type Alex into the assignee filter and set the filter method to Contains, the results will show all people with Alex in their name, whereas if you choose EqualTo, you will only get results for people whose name is exactly Alex.

Tabular Report /Profile

Profile

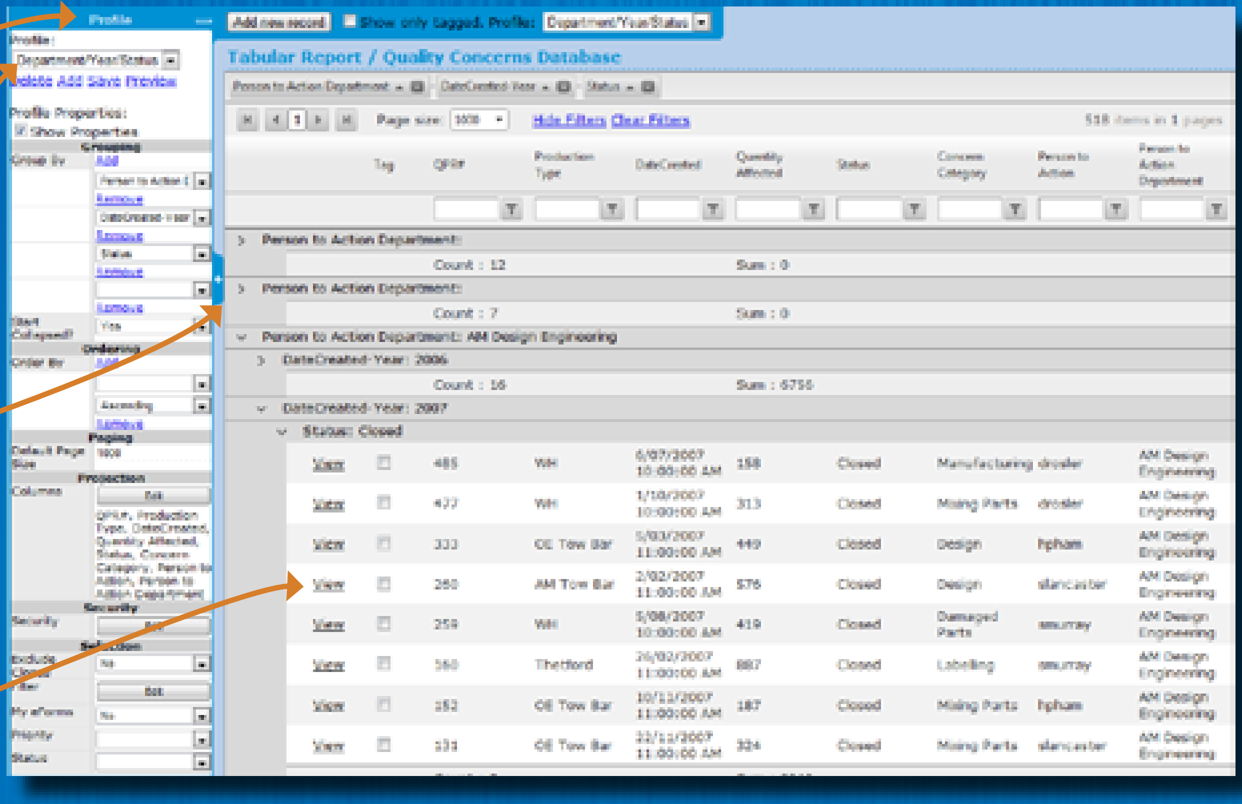
A Tabular Report Profile helps you customise the data displayed in your tabular report.
With profiling you can setup drill down reports. Control ordering behaviour. Customise displayed collumns and set advanced filters.

The left hand side bar is your profile controls. Here you can choose, setup and configure your profiles.

The Profile dropdown allows you to select premade profiles or create new ones.

The arrow can be used to hide or show the sidebar. If you can't see the sidebar click this to show it.

This data has been organised into a drildown report.



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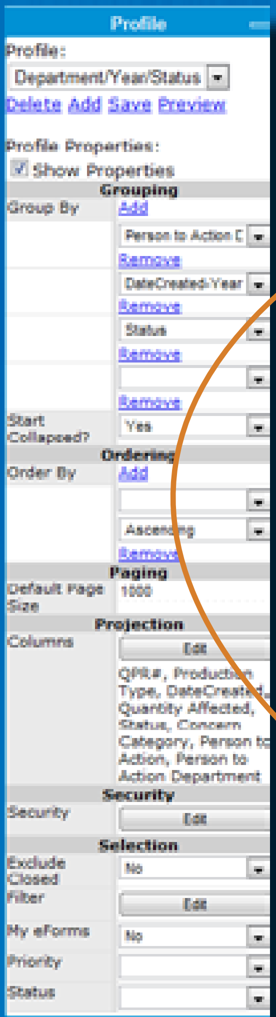
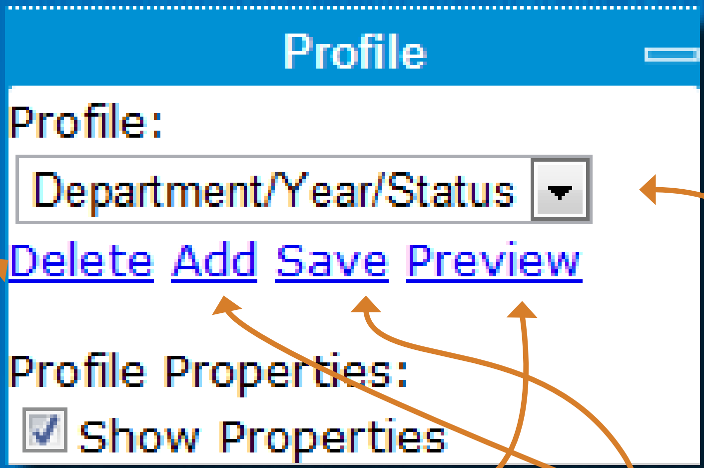
Tabular Report /Overview





Overview
The first section of profiles is used to manage, select and create new Profiles.
By default the previously used profile will be used.

Use the dropdown to select a premade profile.

If you do not want a premade profile select "All Columns" here.

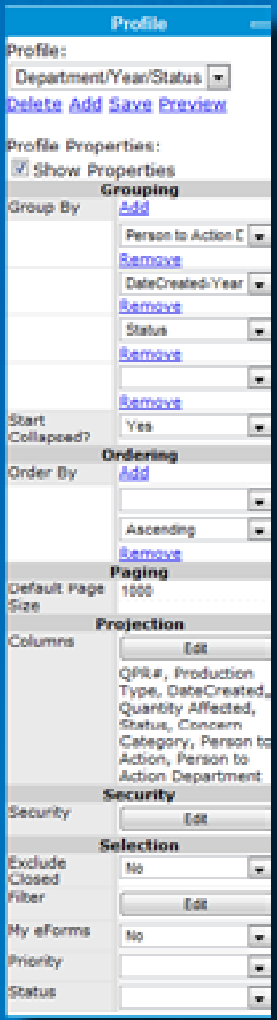
Press Preview to apply the current Profile settings to tabular report. This will not save these settings.

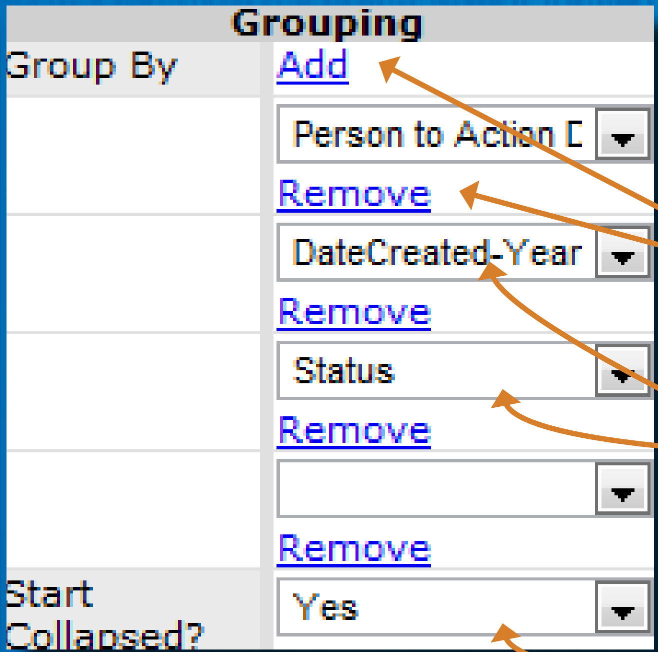
Use the Add button to create a Profile Report.

Press Save to save currently selected settings to the currently selected Profile

Press delete to delete the currently selected profile from the system.

Tabular Report /Grouping





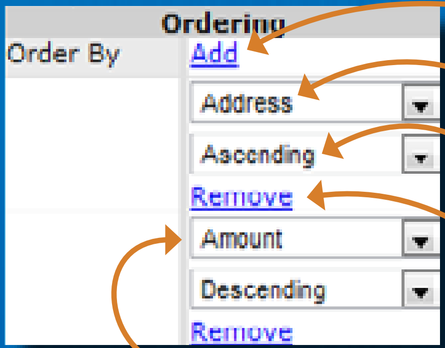
Grouping
The Grouping section allows you to setup a “Drill Down” report. This will group the data into the set groups.

Use the Add and Remove buttons to Add new groups, or remove exsisting ones.

Use the dropdowns to set how the data will be grouped. Each new group will appear within the previous group.

The Start Collapsed option sets weather the groups start closed, hiding their contents or open, showing the groups/data contained within.

Ordering



Click the add button to add an ordering parameter.

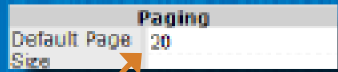
Choose which column you would like to order by on the top dropdown.

Choose weather this column should be ordered in ascending or descending order.

Click to remove the associated ordering parameter.

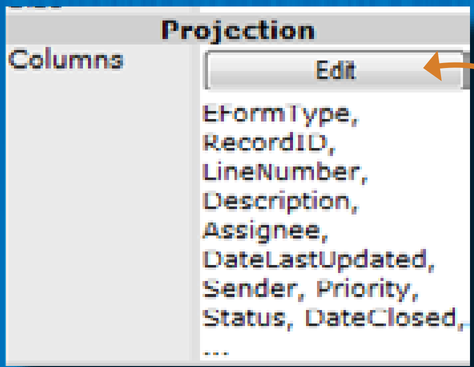
Multiple ordering parameters can be set. Results will be ordered by the top paremeter first.

Paging



Use the Default Page Size option to set how many data entries are displayed on a single page by default.

Projection



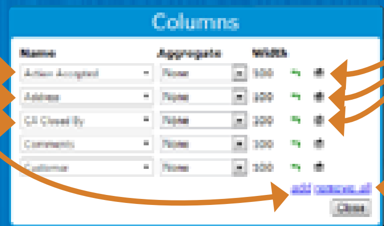
Use this section to set which columns are displayed in the report.

Click Edit to configure this section.

This will open the column editor.

Use the add button to add the desired number of columns.

Set which columns to display using the dropdowns.



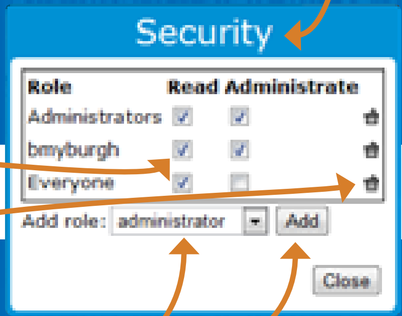
Click the trash can to delete a column.

Use the remove all button to delete all culumns

When you are done configuring columns click close to leave this menu.

Security

Use the edit button in the security section to open the security configuration window.



This window can be used to edit who can view and edit this profile.

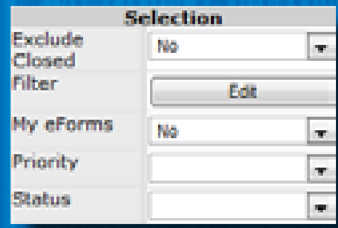
Use the check boxes set which users and groups can view and edit this Profile.

Click the Trash can icons to delete a role.

To add a new role select the user group from the dropdown and click add

Selection

This section controls filtering. This is used to set which reports are displayed.



The Exclude Closed option sets whether closed eForm Records are displayed or not.

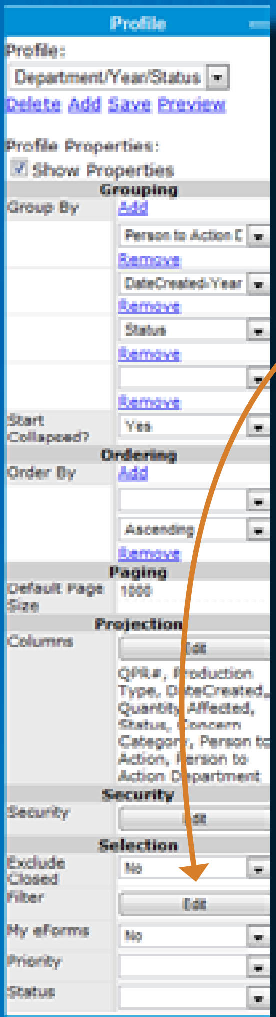
The Edit Filter button is used to access Advanced filtering. Look at the next page for how to use Advanced Filtering.

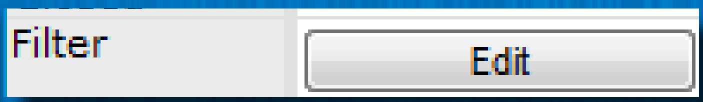
My eForms allows you to choose if the current users' My eForms are displayed in the report.

Use priority to only view eForms of a particular priority.

Use the Status option to filter results by eForm Open or Closed Status.

Tabular Report /Advanced Filtering





Step 1
Open Filtering

Advanced filtering can by accessed by clicking here in the side panel.

Step 2
The Filter Window

You will then be presented with the advanced filtering window.

Click the add line button to create a filter.

Step 3
Create a line

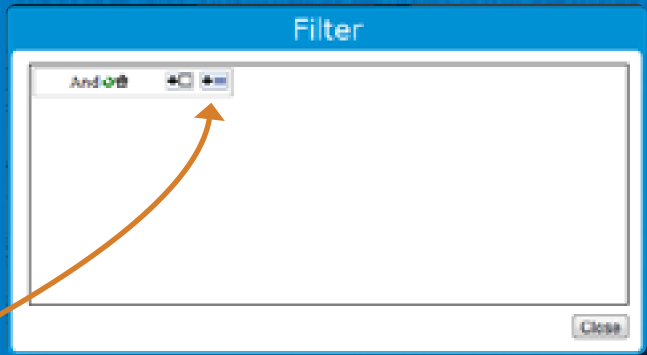
A new line has now appeared. Lines act as your filters.

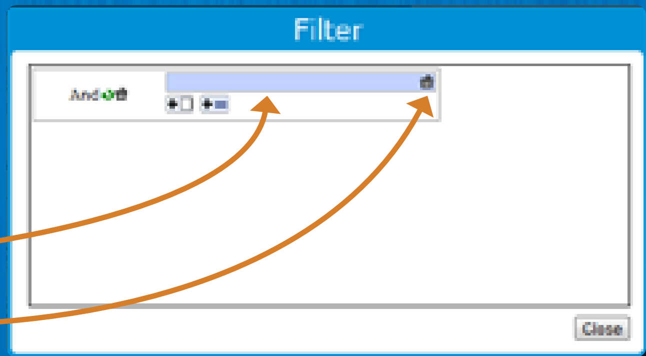
Click on the line to open its options.

To delete a line click on the little trash can.

Advanced Filtering

Advanced Filtering is one of the more advanced parts of the eBMS platform. With advanced filtering you can filter your a report by a huge range of filtering options.





Tabular Report /Advanced Filtering

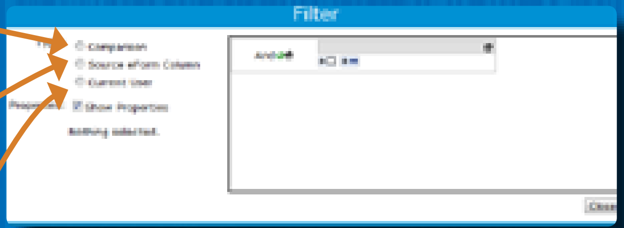
Step 4
Configure a line

These are your filtering types. They define what type of filter this particular line is.

Comparison compares two different sets of data.

Source eForm Column filters by a particular column only.

Current User filters by the current user.



Click Comparison to set this line as a comparison filter.

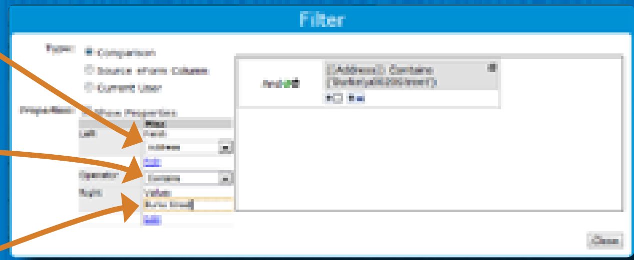
Step 5
Configure a line

You will now see a few options appear.

In this field you set which field you would like to filter from.

Here you set how you would like to filter.

In this field you set what you would like to filter.



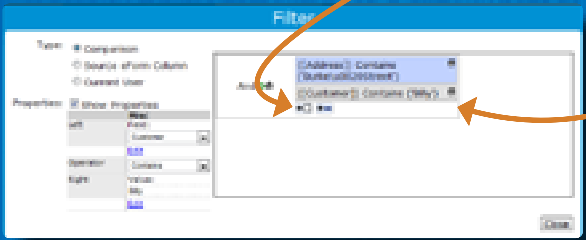
In this example we are filtering within the Address field for information containing the term Burke Street.

This filter will now only display results which have Burke Street as an address.

Tabular Report /Advanced Filtering

Step 6
Groups

Now we can take it one step further - by adding a second line we can add a second filter option.



This area is called a group. Groups are used to group multiple lines together.

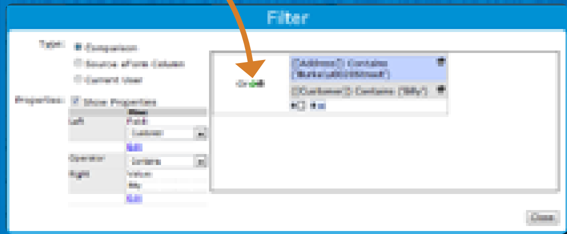
This particular group is an 'And' group. This means the conditions of all lines within the group must be met before a result is returned.

In this example results will only be shown which pass both filter line 1 AND 2.

So this filter will only show results which have an address on Burke Street and Billy as a customer.

Step 7
Groups

By clicking the green circular icon we can change the type of group this is.



There are two types of group. 'And' and 'Or' groups.

'And' groups require results to pass BOTH lines before being displayed.

'Or' Groups require results to pass EITHER line before being displayed.

So in this example results will be displayed if they have an address on Burke Street or if they have billy as a customer.

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Tabular Report /Advanced Filtering

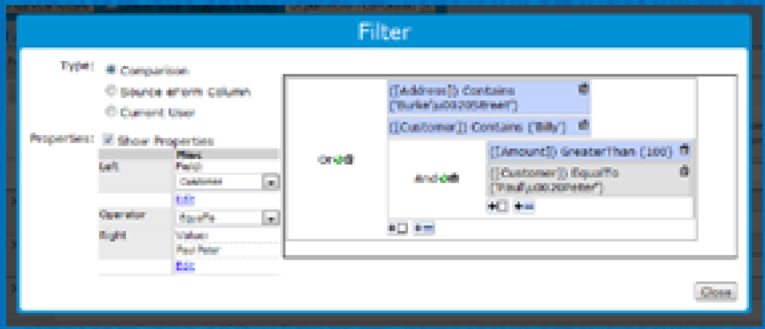
Step 8
Advanced Groups

By clicking the green circular icon we can change the type of group this is.

You can combine groups and lines to create complex filters.

In this example we have put two lines inside an 'And' group, and then put that group and two other lines inside an 'Or' group.

This means that this filter will show a result if it has an address containing Burke Street. Or if it has a customer with Billy as part of his name. Or if it has an Amount greater than 100 AND a customer named Paul Peter.



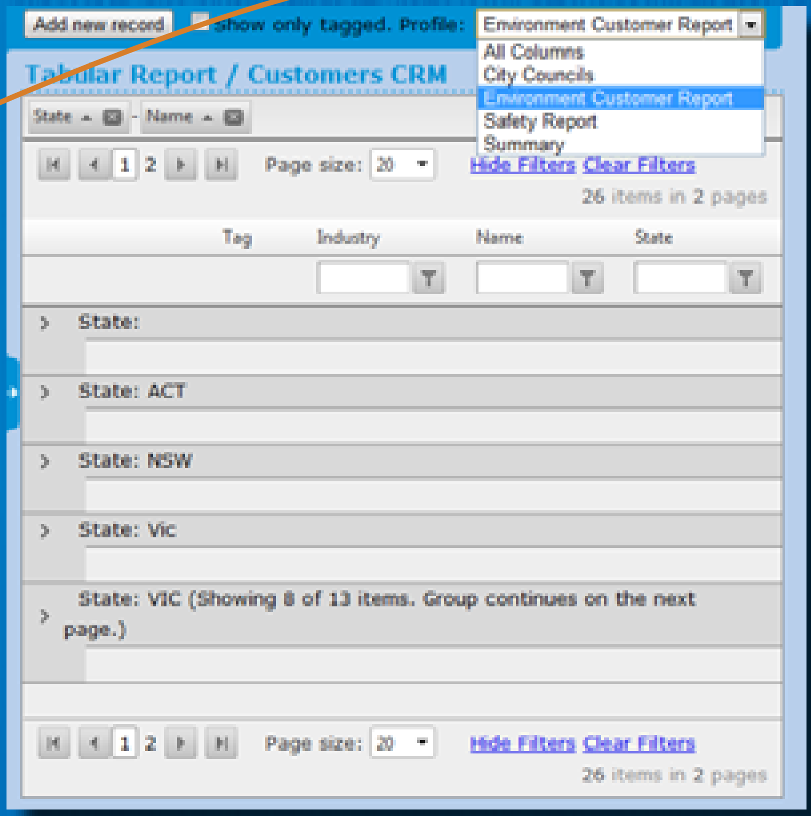
Tabular Report /Grouping

Grouping

This means that this filter will show a result if it has an address containing Burke Street. Or if it has a customer with Billy as part of his name. Or if it has an Amount greater than 100 AND a customer named Paul Peter.

Simply click on the dropdown box labled profile at the top of the screen and select the group of reports you would like to view.

This helps keep your reports simple and easy to manage.



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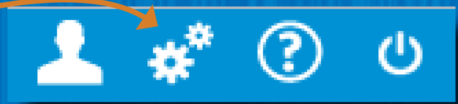
Setting Up Users

In order to setup a new user goto the Control Panel. Then click on Manage Users.



You can also export or import a complete user list in excel format. This is extremily useful for moving a user list from a different system.

From this screen you can administer all users of the system.

Here you can see a list of all current users of the system.
Click to select the user you want to administer.

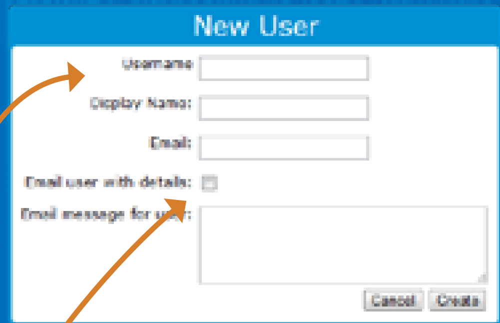
Use the edit button to change the username, Display name, email or password for the selected user.

Rename to change the users user name.

Use the Delete button to remove the current user from the system.

Use the Create button to add a new user.

This will open the new user window.



To create a new user, simply enter a username, display name and email.

Ticking Email user with details will send the new user their username and automatically generated password.

Once details have been entered press Create to create the new user.