Adfor Rapportino
Administrator Guide

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Contents

Table of Contents

I. Mode overview

Administrator mode at Rapportino application allows one to do almost everything:

1. Add new activities
2. Watch activities which are submitted
3. Add new employees (and, consequently, users)
4. Add new projects and assigning all information to it
5. Add new clients
5. Add new divisions, types, companies etc.
6. Edit all the above
7. Delete all the above
8. Get reports in PDF and Excel file formats

Other opportunities will be covered later in this guide.
More power can be reached only by accessing the database directly. Thus, one can watch unsubmitted opportunities and user information which is not available to administrator. Also, administrator password can only be accessed from the database. Database credentials will be covered in this guide later.
Rapportino application is on beta stage of development, so there can be some things which are not desired to be. However, all the tests showed no errors within the functionality, described in this guide.

Authorization

To log in as administrator use username “admin” and password set in the database (default is “admin”).

II. Activities

Activity is a piece of information describing what was done by this or that employee during specific date.

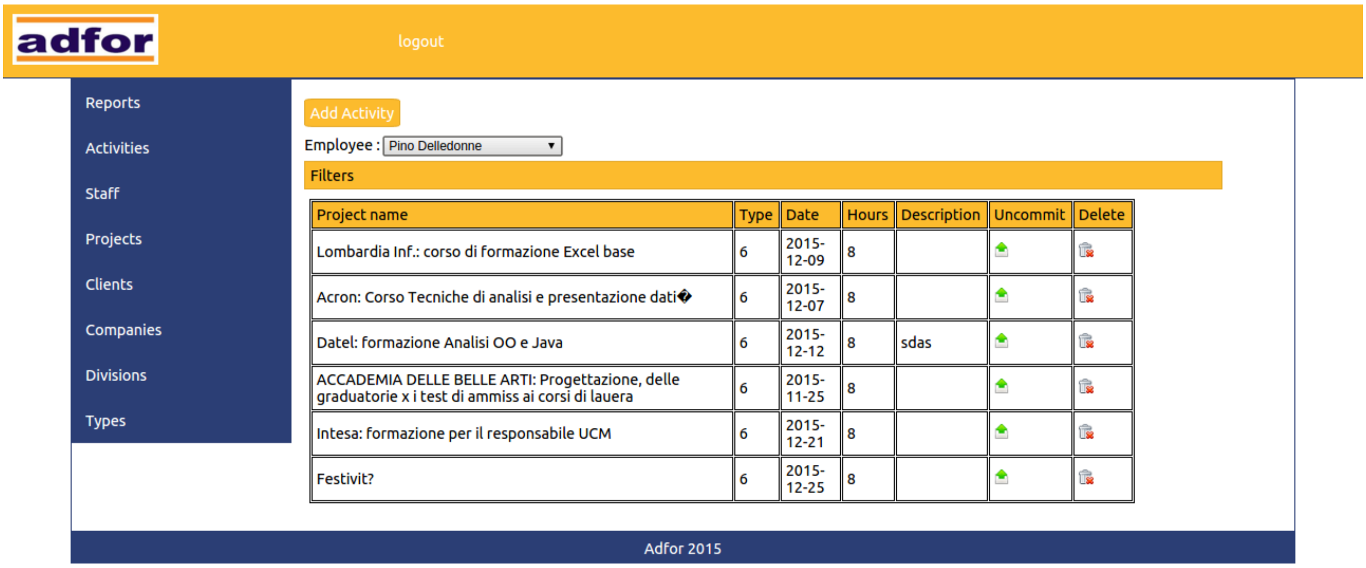
Activity has following parameters:

1. Employee* – describes the employee, who did the job
2. Project* – describes the project within which the job was done
3. Date* – describes the date, when the job was done
4. Hours* – describes how many hours did it take to make the job
5. Type – paid or not
6. Description – little note on the job
7. Place – where was the job done

Fields marked with * are mandatory. Every user of Rapportino application is obliged to fill them to guarantee the correct work of the application.

Watching activities

Press "Activities" button on the left-side menu to move to activities section. Select employee, whose activities you want to get from the drop-down list "Employee". After this, all the activities of this employee will be loaded. You can see it in the table below.



Filtering activities

It is also possible to filter found activities by several parameters. To open filter panel, click the "Filters" label. Parameters available for filtering are:

date and project name.
Filtering by project name goes instantly.

Note: filtering by name looks for substring in project name. Thus, filtering by name “Ad” can find following results:

Adfor
Media advertising
Bad project example

To filter activities by date select “from” and “to” dates from the drop-down date lists in filter panel and click “apply button”. As a result, activities will be filtered from the first date to the second, not including latter.

Adding activities

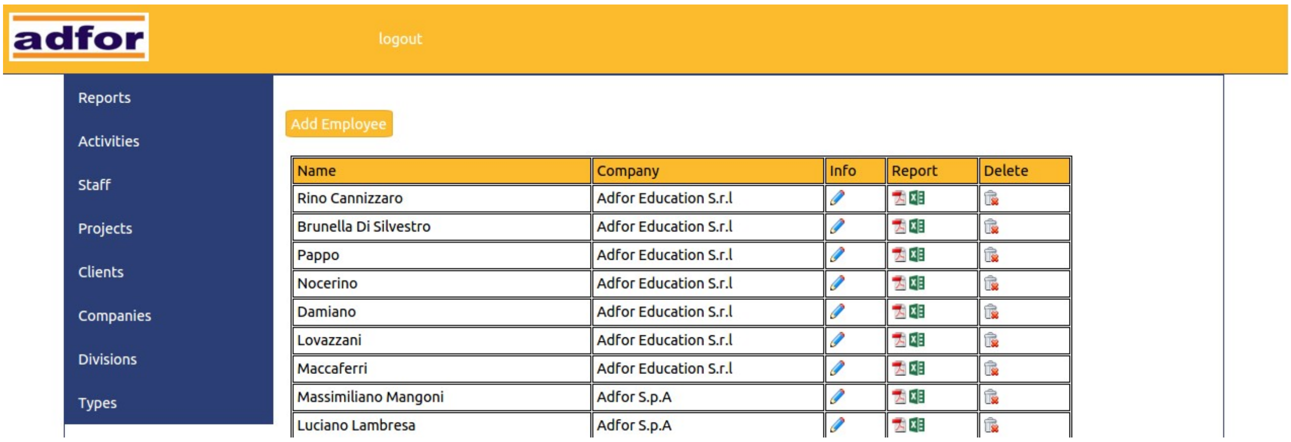
Administrator can also add some activities for user, if user has no possibility to that. To add activity, assure that employee is selected. Then click “Add activity” button and the popup window will appear. Fill in all the mandatory fields and click “Save” button in the bottom of popup window.
Note: activities added by administrator are submitted by deafult.
If you have changed your mind on adding the activity, just click the “close” button at the bottom of the popup window.

Another operations on activities

Apart from watching, filtering and addind activities, administrator can unsubmit and delete activities.
Unsubmitting activity means letting user edit it again (this may be done in case administrator have noticed some error in filling in the form). Note, that user will get no notification about this, however user can notice that one of his activities is unsubmitted in the appropriate cloumn of “Watch activities” user menu.
Unsubmitting may be done by clicking the icon in the apprpriate column of the table (named “uncommit”) in the row of activity you willing ti change.
Deleting activities is an unwelcome action and should be done only in case of emergency. Be sure to warn user about deleting his activities. Administrator can delete activity by clicking delete icon in column “delete” in the row, where target activity is located.

III. Employees

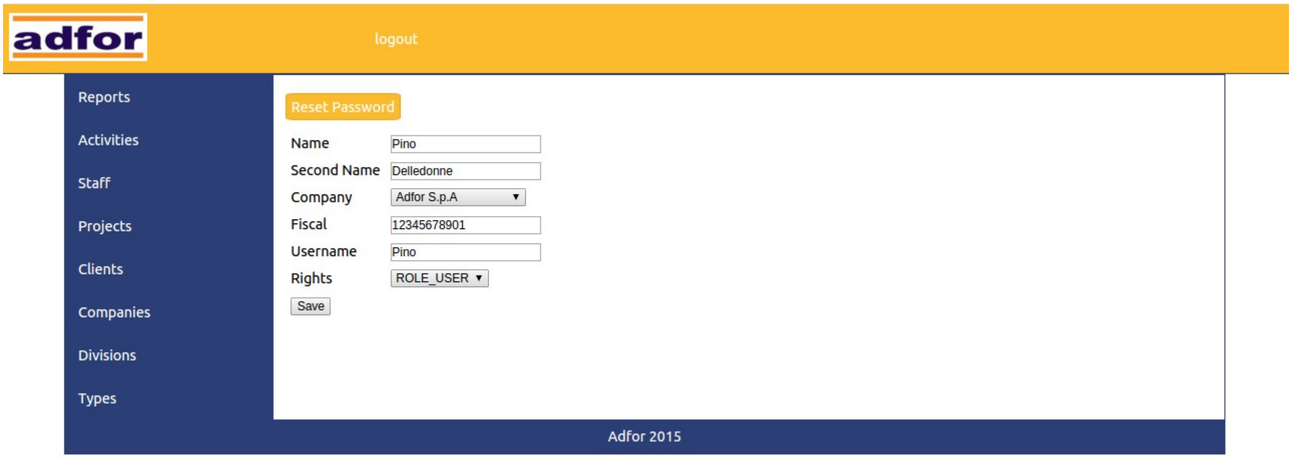
Employee provides administator whole information about users and their activities using a very flexible and convenient mechanism.
To move to employees section, click “Staff” button in the left-side menu.



As it is seen from the web page, you can add new employees, edit already existing and getting reports (more on reports in the following chapters). This page represents all the registered employees, showing their names and companies, they are assigned to. To get more detailed information click pencil icon in the column “edit” in the row of necessary employee.

Viewing detailed information and editing

Once you have clicked the pencil icon in the ”info” column, you will see the following page:



Here you can see detailed information about selected employee. All the parameter are quite obvious, however some of them should be explained.

Username – is a name, which will be used by user to log in Rapportino system.

Rights – is a role that is assigned to the user. There are two roles: User and Administrator.

You can also edit the given information in case it is changed or provided wrong.

Administrator can see no user password due to security policy, however if user has forgotten his password, administrator can reset it by clicking the "Reset Password" button. Password will be set to default, which is "123456".

Adding new employees

Administrator can add new employees from "Staff" page by clicking "Add employee" button. There will be a page, similar to detailde information page, but with empty fields. Administrator has to fill mandatory fields, which are Second name, Company, Username and Rights and click "Save" button. All the other information user can fill by himself.

Note: default password for new user is "123456"

Reports

"Staff" page also provides administrator a small report tool. However, more flexible tool for making reports will appear later in this guide.

Column "Report" has two icons, each of which is responsible for specific kind of report. First one provides report in PDF file, while the second in Excel(or other sheet processing tool) file (actually, it is just a tab separated values).

Note: thus you will only get report for the current month.

Note: only submitted activities are included into report

In fact, these report buttons are just shortcuts for report tool, which will be covered later.

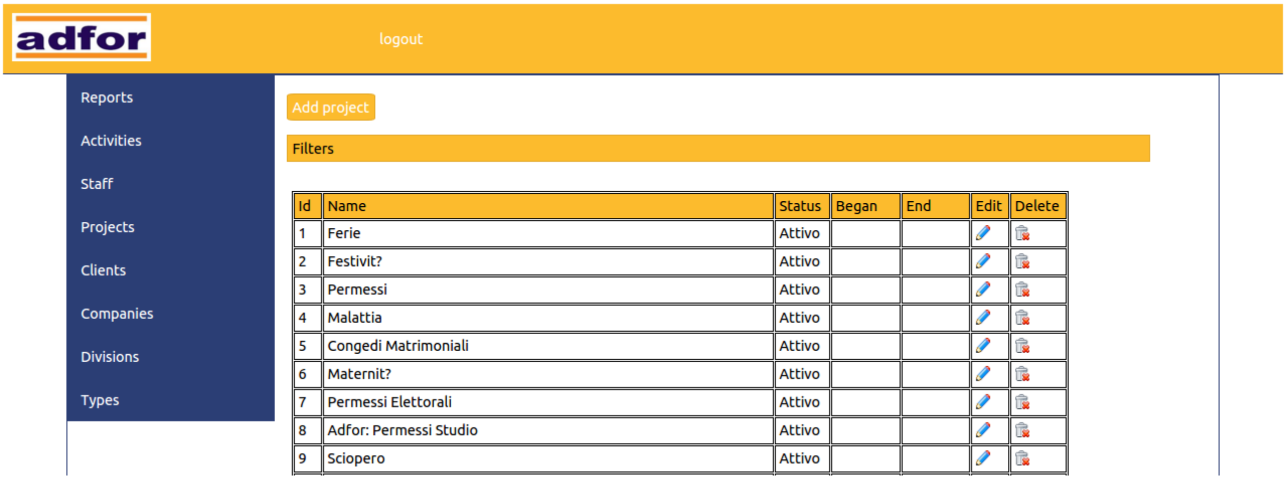
Deleting employees

Administrator can also delete employees. To do that, you should click icon in the "delete" column.

Note: due to report integrity, user activities are not deleted when deleting his profile. To delete activities, you should access database manually.

IV. Projects

Rapportino administrator mode allow you also to work with projects. Click "Projects" button in the left-side menu to move to corresponding page.



"Project" page looks a lot like "Staff" page.
Project has following attributes:

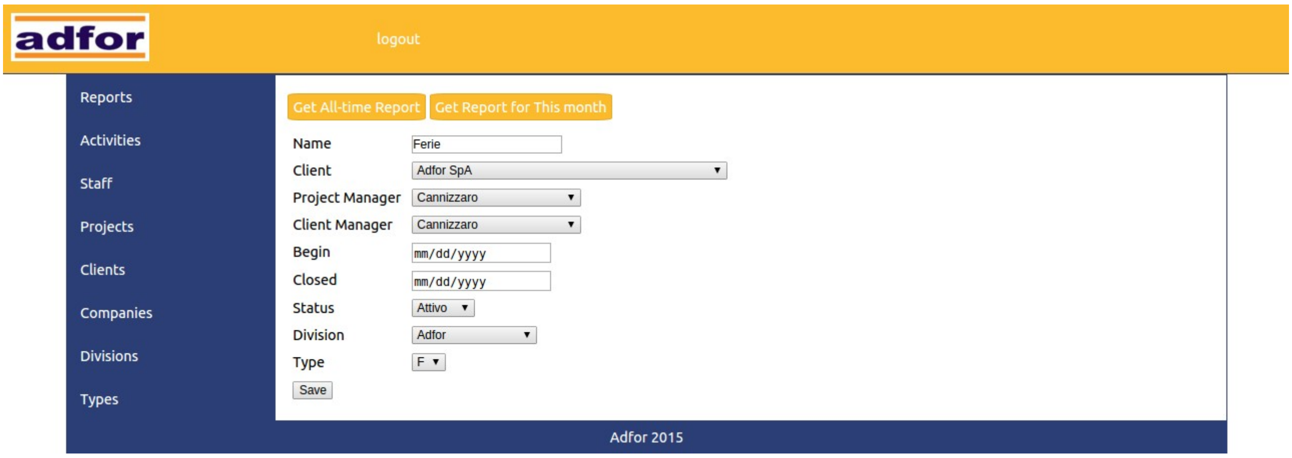
1. Id – identification number, that is assigned to new projects automatically
2. Name
3. Status – Active or Closed
4. Begin and End dates – dates, when project was began and was closed respectively
5. Client
6. Project Manager
7. Client Manager
8. Division
9. Type

Filtering projects

From the "Projects" page administrator can see all the projects and brief information about them. However, it seems hard to process project when its amount is rather big.
That is why we need filters. To open filter panel, click "Filter" label. Filtering has 3 parameters: id, name and client. Filtering mechanism works similarly to one, described in chapter II (Filtering Activities)

Editing projects and watching detailed information

By clicking pencil icon in “edit” column administrator can move to the page with detailed information about the project.



All the fields, except for date, are mandatory. Thus, you can watch basic information about the project and edit it, if necessary, selecting values from drop-down list. To save changes, click “Save” button.

Reports

Project detailed page also allows you to get reports. There are two buttons on the top of the page - “Get all-time report” and “Get Report for current month”. Clicking them, you can get reports for the whole period and for the current month respectively, but only in PDF.

Adding new projects

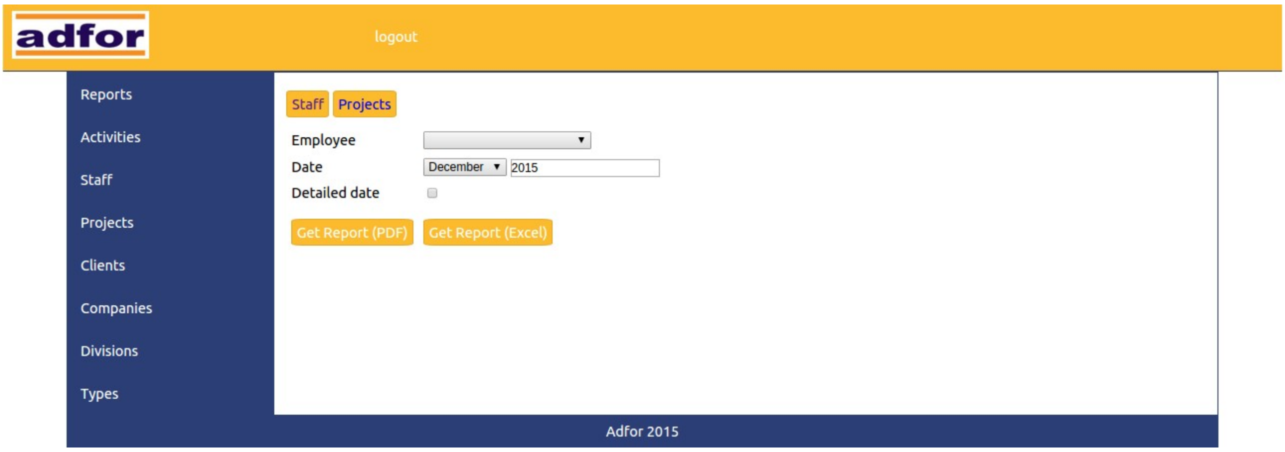
To add new project, click “Add project” button. You will be transferred to a page that looks like edit project page, but with empty fields.
You have to fill all the mandatory fields and then click “Save” button. After this, new project will be available for users to add their activities.

V. Reports

In the prior chapter were shown some ways of getting reports, however it was just a shortcut to this tool.
First of all, click “Reports” button in the left-side menu. Then, select which kind of report do you want to get – staff report of project. Staff report show which activities has the specific employee, and project report shows, which employees have activities for this project.

Staff reports

To go to staff report page click “Staff”. You will see the window, shown below.



Here you have to specify search parameters: employee and date. By default, you can choose a month and a year. However, you can switch to detailed date mode by checking “Detailed date”. Then, you will have to choose “from” date and “to” date. After this, you can get the report either in PDF or in XLS file formats.

Staff report consists of two parts. First is day-by-day report where you can see which job was done by employee every day of the selected period. It includes name of the project, amount of hours and type of activity. Second part is summary which shows you how many hours did employee work on the specific project on the whole selected period.

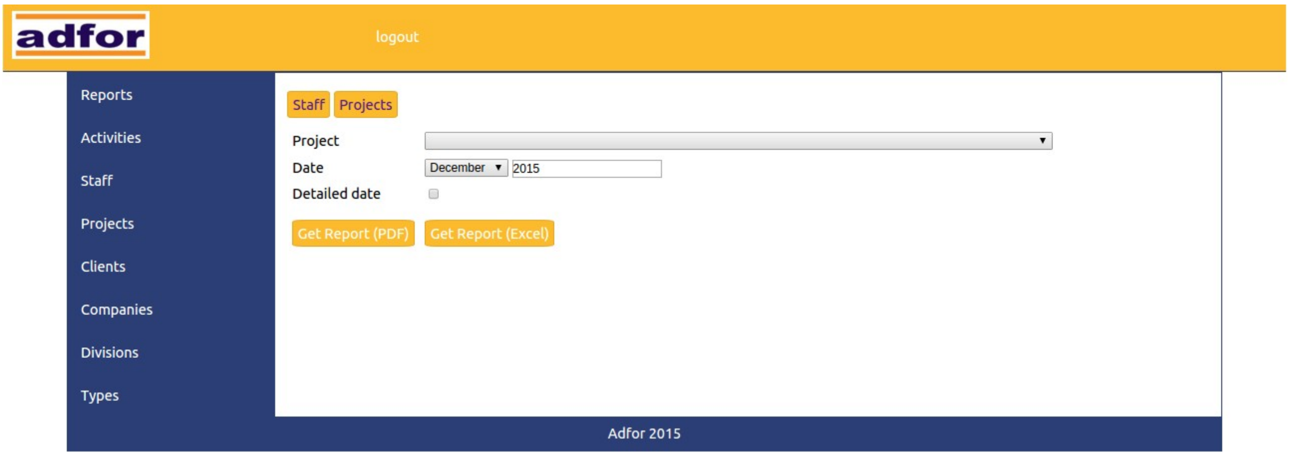
Project Reports

To go to staff report page click “Project”. You will see the window, shown below.

Note: maybe you will have to wait for a while, while list of projects is loaded

Algorithm is the same as for staff report:

1. Select project
2. Select date by selecting a month or y checking “Detailed date” and setting custom interval
3. Save report in PDF or XLS file format

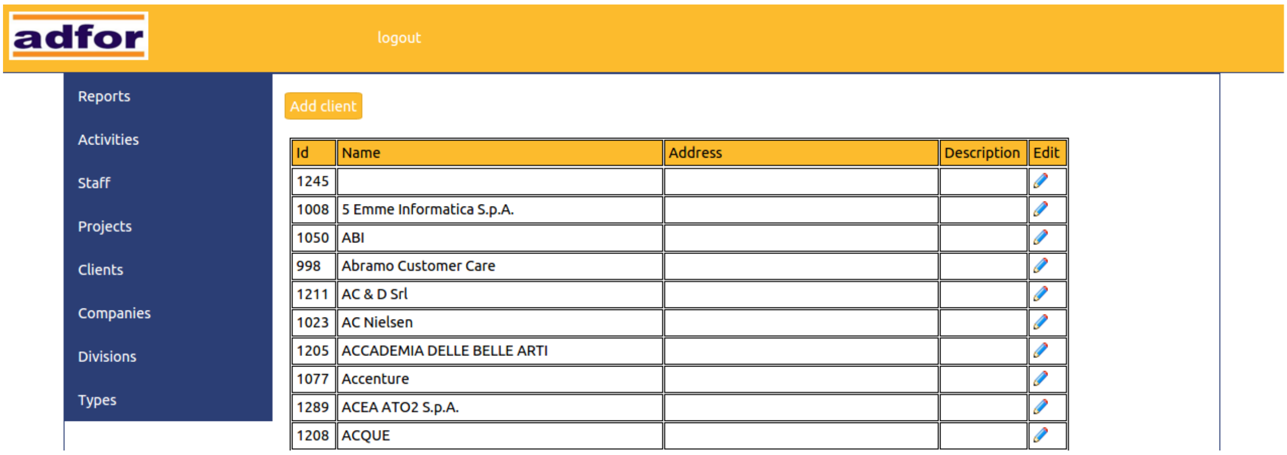


Staff report is the table, which shows how many hours did every employee work on the selected project during selected period.

VI. Other Pages

Pages “Clients”, ”Companies”, ”Divisions” and “Types” are very similar, so we will take a look only at one of them - “Clients”.

Click “Clients” button in the left-side menu. You will see the following page:



Id	Name	Address	Description	Edit
1245				
1008	5 Emme Informatica S.p.A.			
1050	ABI			
998	Abramo Customer Care			
1211	AC & D Srl			
1023	AC Nielsen			
1205	ACCADEMIA DELLE BELLE ARTI			
1077	Accenture			
1289	ACEA ATO2 S.p.A.			
1208	ACQUE			

There is a list of all clients of the company, shown id, name, address and description.

Adding

To add new client, click “Add client” button on the top of the page. The popup window will appear. The only mandatory field is name. After filling fields click “Save” button to save changes.
Note: to close the popup window click on any point of the faded area (not the popup window).

Editing and deleting

To edit existing information click the pencil icon in the column “Edit”. The popup window similar to one from “Adding” section will appear. There you can edit given information and save it by clicking “Save” button.
To delete client click pencil icon in the column “Edit” and click “Delete” button on the bottom of the appeared popup window.

Note: clicking on the name of the client in “Client” page will transfer you to “Project” page and show projects of this client

VII. Database

If there is case when you have a lack of opportunities of administrator mode, you can access database directly. To do this, contact technical supervisor of the project – Massimiliano Mangoni to get the following instructions.
Here we will show some samples of SQL queries to do some basic operations

1. Change administrator password

```
UPDATE users SET password=”new password” WHERE staffId = null;
```

“users” is a table, containing information for users to log in the system.

Warning! Password are not stored encrypted.

2. Delete project

For this, you can use interface from administrator mode in Rapportino application, however if there are some problems, you can do it like this:

```
DELETE FROM activity WHERE proj_id = pid;
DELETE FROM projects WHERE id=pid;
```

Where “pid” is id of project to be deleted(for example, 5).

Warning! Be careful when contacting database directly. It is persistently recommended to make a backup before editing.