

Officemate User Guide



Company Information

Cavidel Limited is a process automation company that helps businesses to align/re-align their business units and overall strategies with operational processes and information technology to reduce cost, improve productivity and increase efficiency.

We are a dynamic technology Company with focus on financial technologies and provision of enterprise resource management tools. We deliver our solution through detailed process review and automation of business and client integration processes. Our products are specially developed for financial markets, banking, human resources, e-commerce, real estates, agricultural systems etc. Established in 2013, Cavidel Limited has evolved into a dynamic organization through its long tradition and experience in working with conglomerates, financial services firms, consulting practices, public institutions, medical institutions etc. We take great pride in our reputation for consistently delivering quality services. We use our ingenuity to save our clients time and money, reduce risks, increase efficiency and maximize sustainable outcomes. We do this through innovative thinking, international perspectives, local knowledge and the immense experience and technical know-how of our team.

Document Revisions

Date	Version Number	Document Changes
30/5/2018	0.1	Initial Draft
5/6/2018	0.2	Reviewed Draft

1. Introduction

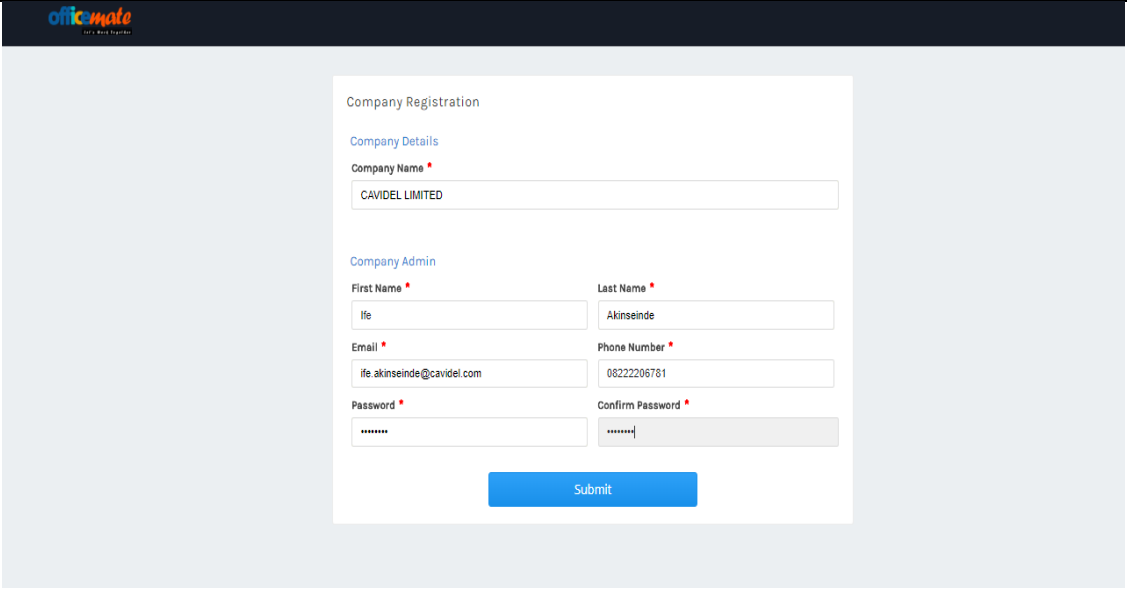
1.1 Scope and Purpose

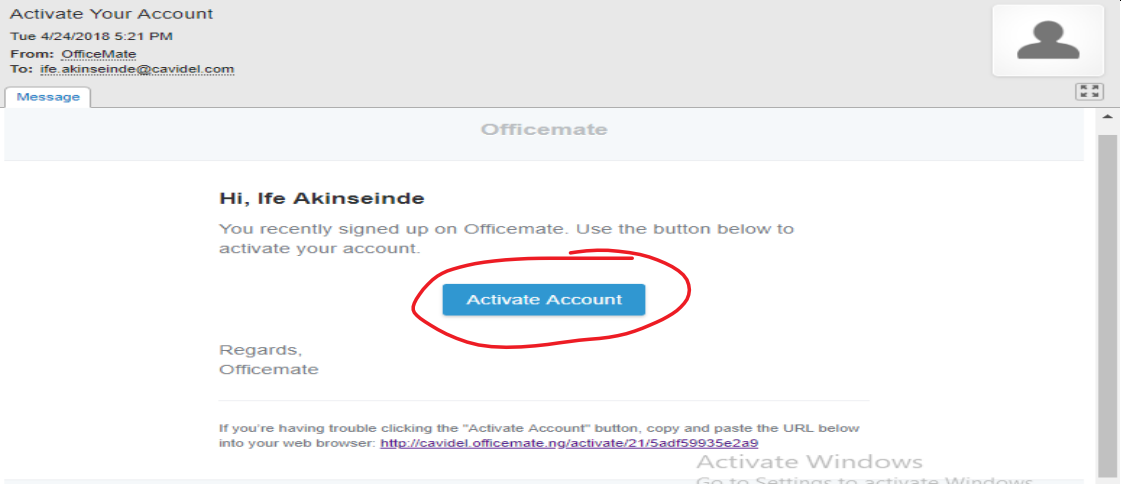

Officemate is an enterprise resource planning (ERP) solution with core functionality to automate business operations through capturing, processing and reporting on customer/employee information, billing, inventory & fleet management, staff appraisal, employee survey, training & learning management, payroll, employee self-service, leave, loans, statutory remittances, compliance tracking, document management etc.

This user guide provides information and instructions needed to set up and use Officemate software. It contains written and visual information such as screen shots taken to assist users to completing the procedures required.

1.2 Getting Started With the Different Modules Setting up Officemate

A. Company Registration

Step	Procedure
1	<p>The company admin registers both the company and the company admin account here. To setup registration details:</p> <p>Go to: website>>Registration Page</p> <p>Type your company name, admin details including company email address and new password that would be used by the admin.</p>
	
2	<p>After registration, a link is sent to the admin's company email for email verification and confirmation.</p>

	
3	Admin checks company email for confirmation link and clicks "Activate Account". You will be redirected to the login page to login using the "new password" and "company email address" inputted in the registration page.
	

B. Module: Company Admin

A. Employee Onboarding-User Roles by Admin

Step	Procedure
1	<p>Create User Roles: Go to: Company Admin >>Create Roles Enter the role name, role description, display name of the role e.g. Software Developer, MD, Human Resource Manager etc. And click "Create Role"</p> <p>To Edit Role: Click on "edit" from the table below the role creation page to change or modify the details.</p> <p>Note: Only the admin has access to create roles. The admin has access to all modules. All modules are circled below for clearer description.</p>

2

Microsoft Technologies

OFFICEMATE > ROLES.CREATE

CREATE ROLE

Name *

Display Name

Description

Create Roles

Manage Roles

NAME	DISPLAY NAME	COMPANY	DESCRIPTION	ACTIONS
software developer	Software Developer	Microsoft Technologies		Edit

Copyright © 2018 OfficeMate. All rights reserved. [Terms of use](#) | [Privacy Policy](#)

Designed and Developed by Cavidei Limited

Activate Windows
Go to Settings to activate Windows.

3

Invite Staff:

Go to: Employee

This page displays a view of all created staff.

Admin can view and edit staff details here.

Admin can view the list of all the employees in the company.

Microsoft Technologies

OFFICEMATE > STAFF INDEX

STAFF LISTING

Staff Name	Email Address	Mobile Number	Account Status	Actions
Ife Akinseinde	bill@email.com	08130535917	Active	View Edit
Sam Smith	sam@email.com		Active	View Edit
John Snow	john@email.com		Active	View Edit
Mark Robinson	mark@mailinator.com	08044439589	Active	View Edit

Showing 1 to 4 of 4 entries

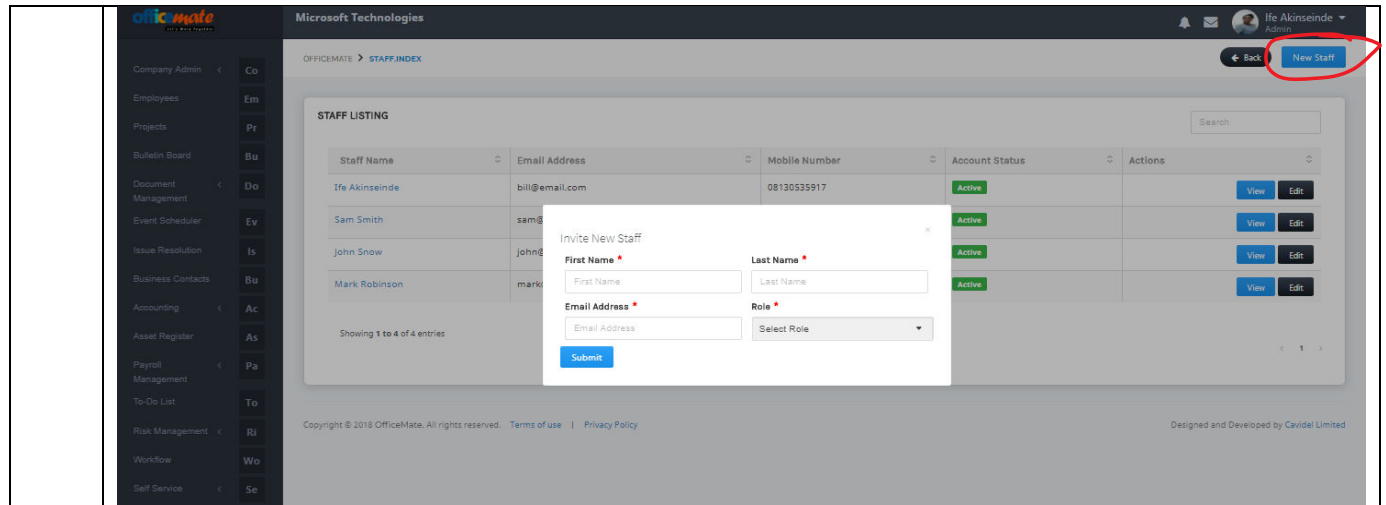
Copyright © 2018 OfficeMate. All rights reserved. [Terms of use](#) | [Privacy Policy](#)

Designed and Developed by Cavidei Limited

4

Click on "New Staff"

Enter the details of the employee and select the appropriate role.

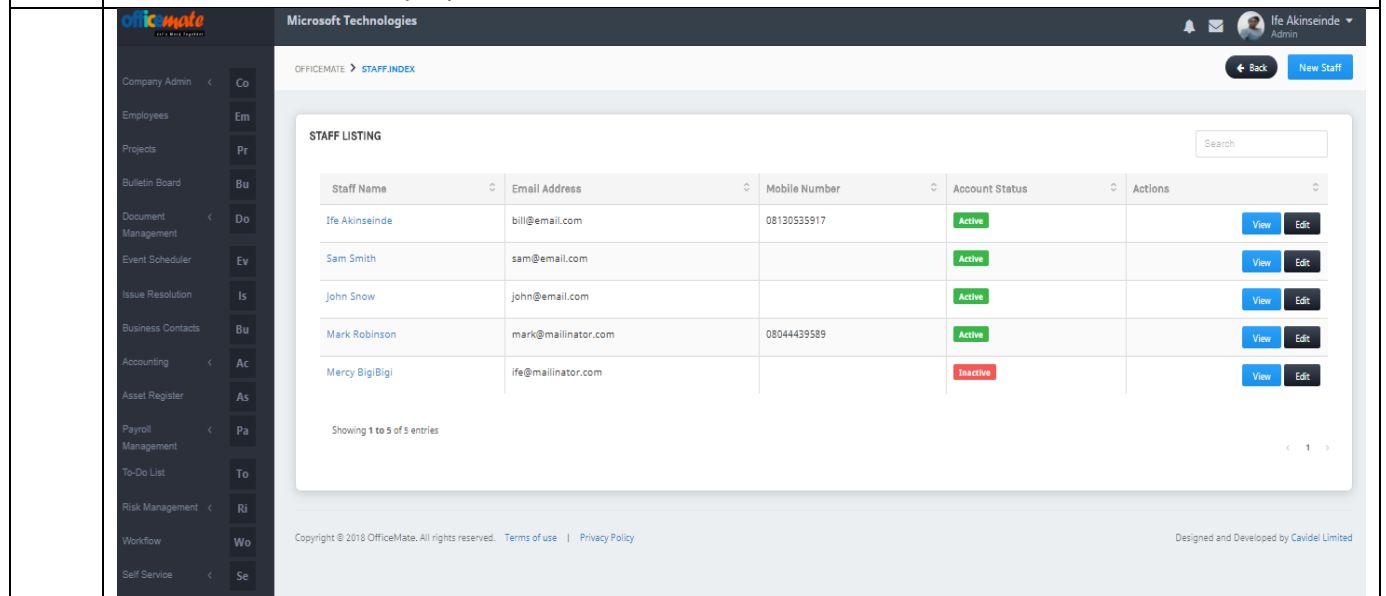


5

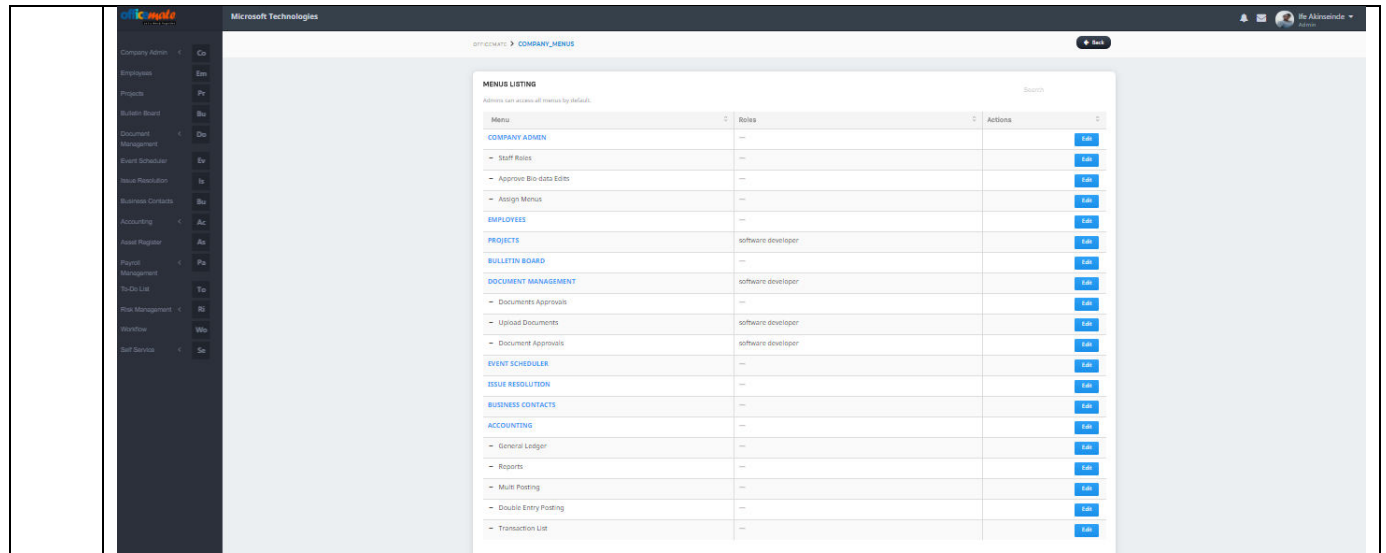
Inactive account status

It shows the list of all the employees in the company.


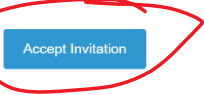
It shows the list of employees whose accounts are activated and inactive.

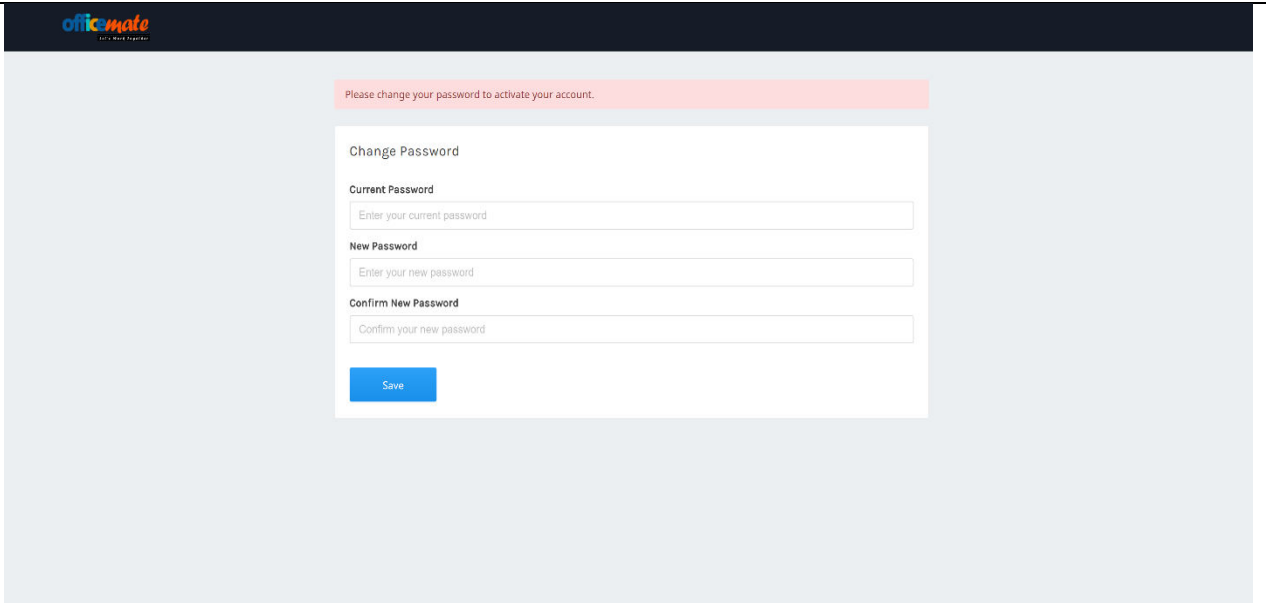
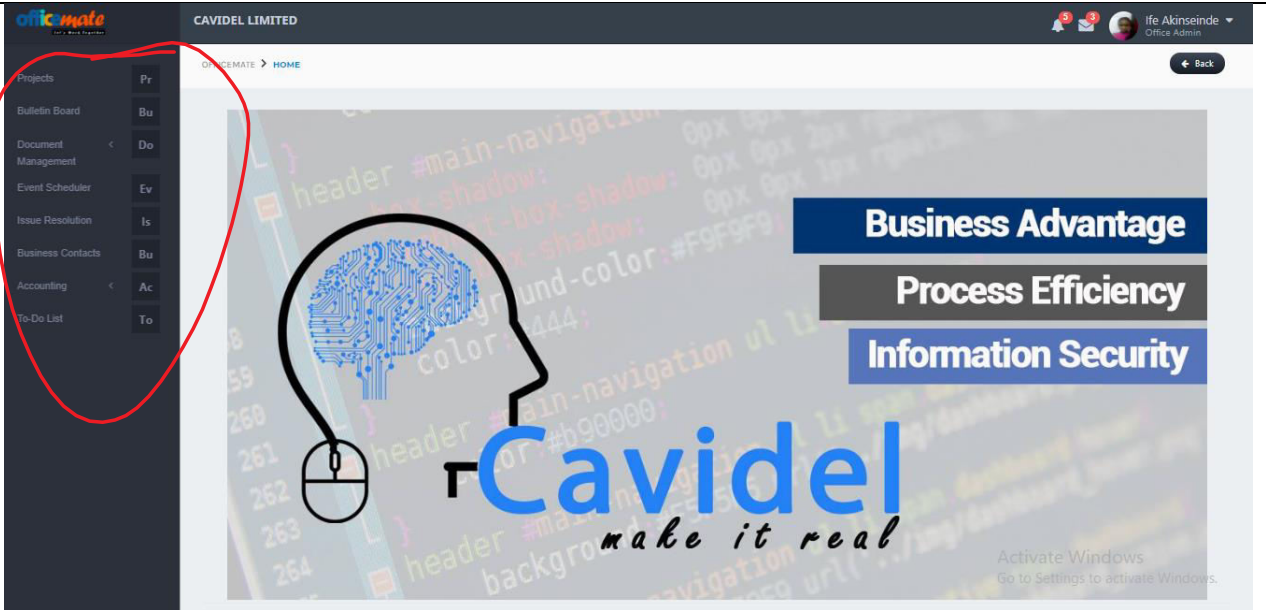


Assign Menus: This is where the admin defines the permissions for menus (modules). Only roles that have been assigned to a menu, can see and access that menu.



B. Employee Onboarding- Staff

Step	Procedure
1	<p>To activate account status: Admin will request staff to check email address for confirmation link.</p> <p>Staff/New Employee:</p> <p>Go to: email address>> view and click on invitation link to Login to officemate and activate account.</p> <p>Note: The email address in the picture below is a sample email and password.</p> <div style="text-align: center;">  </div> <p>Hi, kola Tolani</p> <p>You have been invited to join Microsoft Technologies on Officemate. Use the button below to accept the invitation and activate your account.</p> <p>Login Email: rabo.sandbox@gmail.com</p> <p>Password: c5aaf</p> <div style="text-align: center;">  </div> <p>Regards, Officemate</p>
2	<p>On-clicking "Accept Invitation", you will be redirected to a new page to change password.</p> <p>Note: Current password is " the password in the confirmation email sent to you"</p>

	You are to enter a new password.
	
3	Employee Display Page Employees have access to limited modules- Projects, Bulletin Board, Document Management, Event Scheduler, Issue Resolution, Business Contacts, Accounting and To-do-List
	
4	Staff Profile: Employees are expected to Login >> go to the top right navigation bar >>Click the down arrow beside the name as shown in the picture below>> Click "Edit Staff Profile"

Company Admin

Employees

Projects

Bulletin Board

Document Management

Event Scheduler

Co

Em

Pr

Bu

Do

Ev

Microsoft Technologies

OFFICEMATE > STAFF INDEX

Ife Akinseinde

Admin

Edit Staff Profile

Logout

STAFF LISTING

Staff Name	Email Address	Mobile Number	Account Status	Actions
Ife Akinseinde	bill@email.com	08130535917	Active	<div>View</div> <div>Edit</div>

5

Bio-Data Page: Employees are to fill in their details in this page and submit it for approval.

Projects

Bulletin Board

Document Management

Event Scheduler

Issue Resolution

Business Contacts

Accounting

To-Do List

Pr

Bu

Do

Ev

Is

Bu

Ac

To

CAVIDEL LIMITED

OFFICEMATE > STAFF EDIT_BIODATA

EDIT BIO DATA - IFE AKINSEINDE

Upload Profile Picture

Choose File

Upload Profile Photo

First Name

Middle Name

Last Name

Ife

Middle name

Akinseinde

Personal Email

Date Of Birth

Home Phone Number

mercyifeoluwa@gmail.com

1991-06-26

Enter Home Phone Number

Mobile Phone

Marital Status

08111106781

Single

Work Phone Number

Religion

Enter Work Phone Number

Christianity

No Of Children

Town / City

0

Enter Town

State

Country

Osun State

Nigeria

Address1

Address2

Plot 5, Block 3, Estate 11, Redemption Camp, Mowe

Enter Address2

HMO DETAILS

Health Maintenance Organisation (HMO)

Health Maintenance Organisation Plan

HMO Number

Select your HMO

Select your HMO Plan

Enter HMO Number

NEXT OF KIN & BENEFICIARY DETAILS

Next Of KIN

Next Of Kin Phone Number

Next Of Kin Email

Enter Name of Next of KIN

Enter Next of Kin Phone Number

Enter Next of Kin Email

Next Of Kin Address

Beneficiary Name

Enter Next of Kin Address

Enter Beneficiary Name

Beneficiary Phone Number

Beneficiary Email Address

Enter Beneficiary Phone Number

Enter Beneficiary Email Address

Beneficiary Address

BANK DETAILS

Enter Beneficiary Address

Choose Bank

Bank Account Number

Select a Bank

Enter Bank Account Number

PAYROLL DETAILS


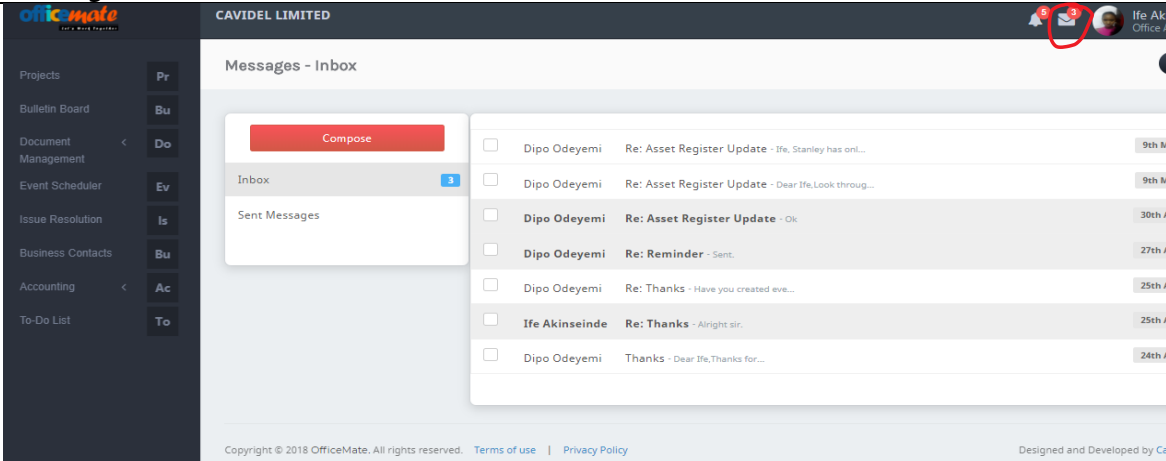
Payroll Group

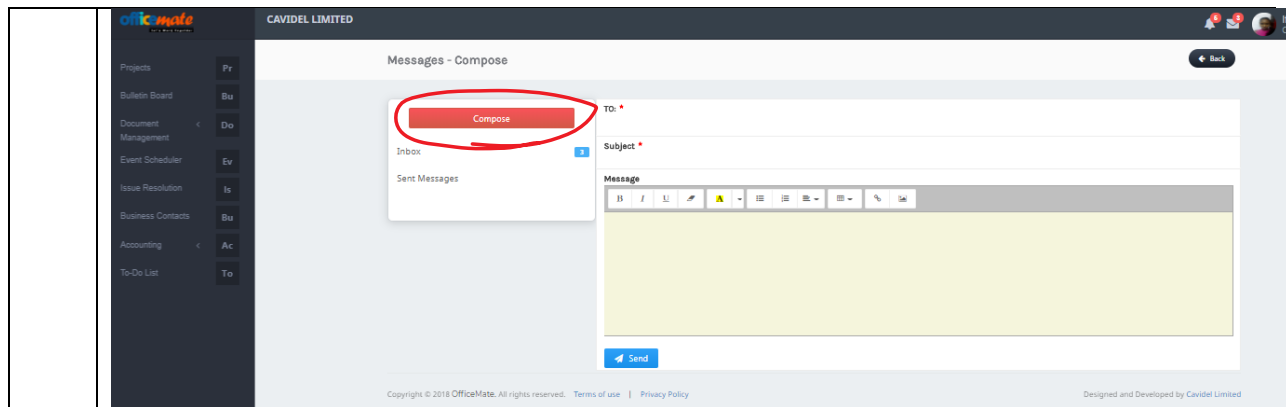
Select a payroll group

Update Bio Data

C. Top Right Navigation Bar

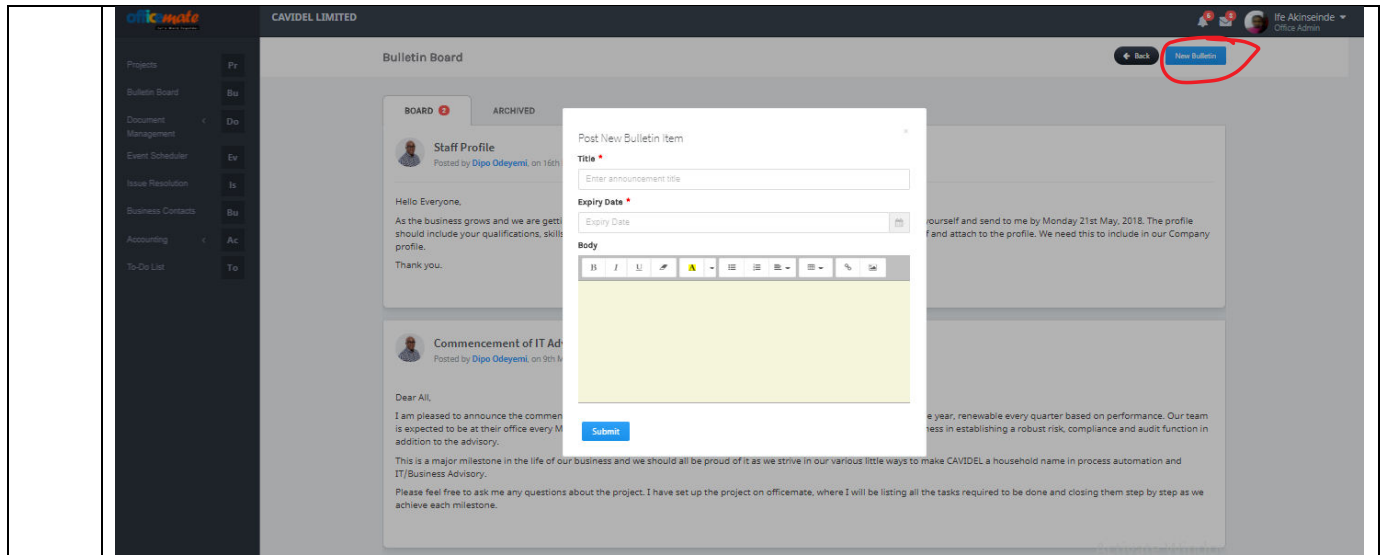
Step	Procedure
------	-----------

1	<p>Notification: Shows various notification from the different modules in the system Notifications can also be seen from staff emails</p> <p>Go to: Top right navigation bar>>Click on the bell to see drop down, view and read all notifications.</p>
	
2	<p>Message: A section for sending new messages and reading received messages. Employees can view their inbox and sent messages for incoming and outgoing messages</p>
	
3	<p>Compose: Employees can write and send messages across to colleagues. Click on "Compose"</p>



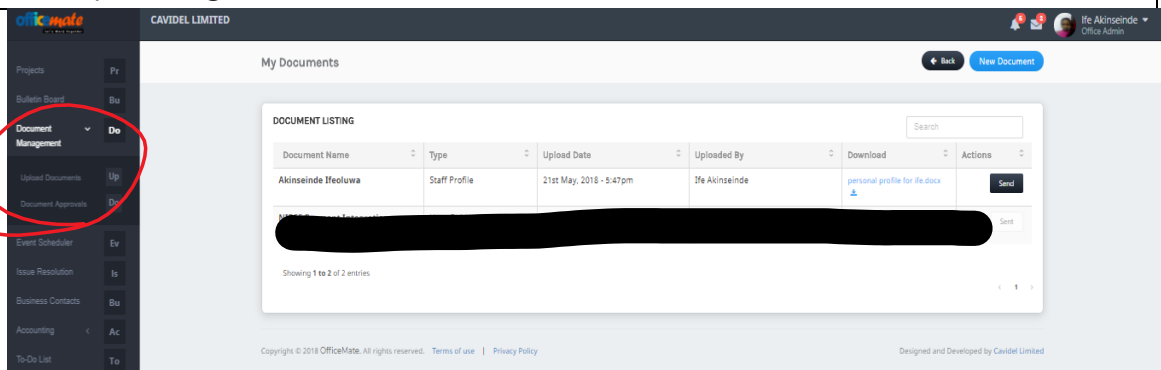
D. Module: Bulletin Board

Step	Procedure
1	<p>Bulletin Board: This serves as a visual way to communicate with employees through posting of informative announcement.</p> <p>Employee can see a list of all the announcement on the bulletin board</p> <p>Go to: Side menu>>Click on Bulletin Board to view announcements on the board.</p>
2	<p>New Bulletin: Admin can post company announcement on the bulletin board</p> <p>Click on New Bulletin>> Complete the Post New Bulletin form with the information you want to be seen on the bulletin board >>Click on the Submit button to post message.</p>

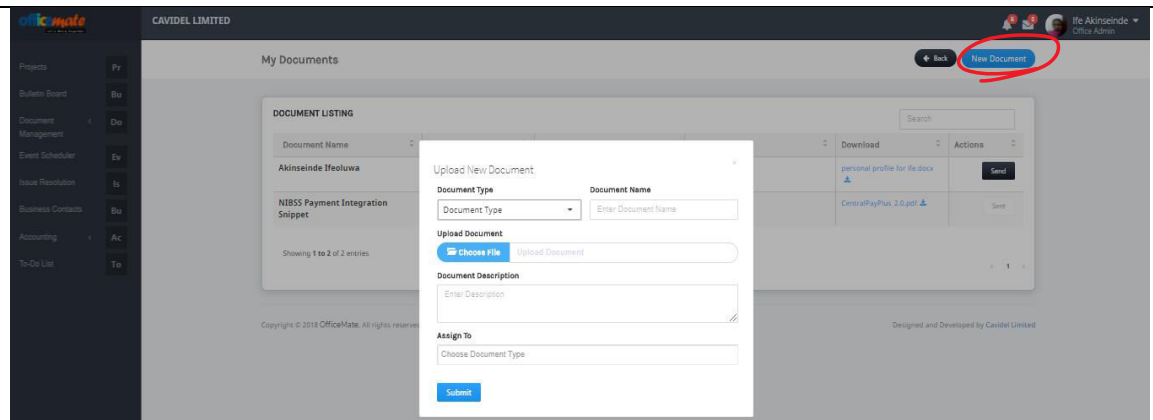


E. Module: Document Management

Step	Procedure
1	<p>This is a document management tool that stores, manages and tracks its electronic documents and electronic images of paper based information captured through the use of a document scanner.</p> <p>Go to: Document Management>>Upload Documents</p> <p>You can see listing of all the documents that have been uploaded on the system. It keeps a record of the various versions created and modified by different users (history tracking).</p>
2	<p>New Document: Anybody can upload a document but they would have to be approved by a supervisor. Click on New Document to upload any document and assign to the person you want to view the document. Documents cannot be view unless they</p>

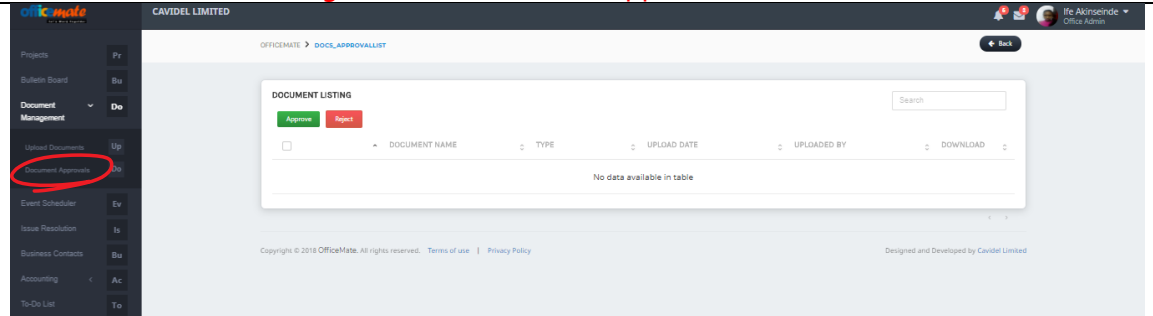


have been approved.



- 3 **Document Approvals:** Employee can see all documents sent to them that is awaiting approval. They can choose to accept or reject approval. E.g. Leave letter, Resignation Letter, Request etc.

Go to: Document Management>>Document Approval



F. Module: Projects

Step	Procedure
1	<p>This is a project management tool that is used to boost collaboration among team members and makes it easy to manage unlimited projects and customers without additional budgets.</p> <p>Admin View: By default the admin can see the listing of all the projects that employees are engaged in.</p> <p>Go to: Projects</p>

Microsoft Technologies

Projects Management

COMPANY ADMIN < Co

EMPLOYEES < Em

PROJECTS

Project Title	Assignees	Supervisor	Tasks	Progress	Status	Actions
Project One	Sam S, John S	Ife Akinseinde	3	50%	In Progress	
Project Two	Ife A, John S	Ife Akinseinde	3		In Progress	
Project One		Ife Akinseinde	0		In Progress	
Project Once Upon a Time	Ife A, Sam S, John S	Ife Akinseinde	3		In Progress	
OfficeMate SaaS Application		Sam Smith	0		In Progress	

Showing 1 to 5 of 5 entries

Copyright © 2018 OfficeMate. All rights reserved. [Terms of use](#) | [Privacy Policy](#)

Designed and Developed by [Cavidel Limited](#)

- 2 **New Project:** This for creation of new projects, tasks and steps, which are assigned to relevant employees.
Employees can create new projects and assign to themselves and other people.
Go to: Project>>Click on New Project
Enter the project details

CAVIDEL LIMITED

Projects Management

PROJECTS

Showing 1 to 1 of 1 entries

Copyright © 2018 OfficeMate. All rights reserved. [Terms of use](#) | [Privacy Policy](#)

Designed and Developed by [Cavidel Limited](#)

Create New Project

Project Title *

Supervisor *

Start Date *

End Date *

Customer *

Description / Project Details

Submit

- 3 **Employee View:** Employees can see the listing of all projects that have been assigned to them and the corresponding progress level.
Go to: Projects

CAVIDEL LIMITED

Projects Management

PROJECTS

Project Title	Assignees	Supervisor	Tasks	Progress	Status	Actions
Cavidel Officemate	Ife A, Rilwan B, Stanley U	Dipo Odeyemi	62	37%	In Progress	

Showing 1 to 1 of 1 entries

Copyright © 2018 OfficeMate. All rights reserved. [Terms of use](#) | [Privacy Policy](#)

Designed and Developed by Cavidel Limited

- 4 **Project View:** Click on the project title to view more details about the project description and the project task assigned.
 You can see all projects tasks including current and past tasks carried out.
 You can see all project chats view previous and current chats among team mates.
To add task: Click on "Add Task" and fill the add task form.

Project: Cavidel Officemate

PROJECT TASKS

- Ministry Forum discussion Assigned To: Stanley Odeyemi
- Add Account/Play Field to Customer Table Assigned To: Stanley Odeyemi
- Include alert for task assignment Assigned To: Stanley Odeyemi
- Include Asset Register Assigned To: Stanley Odeyemi
- Statistics For Issues Resolution Assigned To: Stanley Odeyemi
- Project Documents Assigned To: Stanley Odeyemi

ADD TASK

Task Form:

Title: *
 Enter Task Title

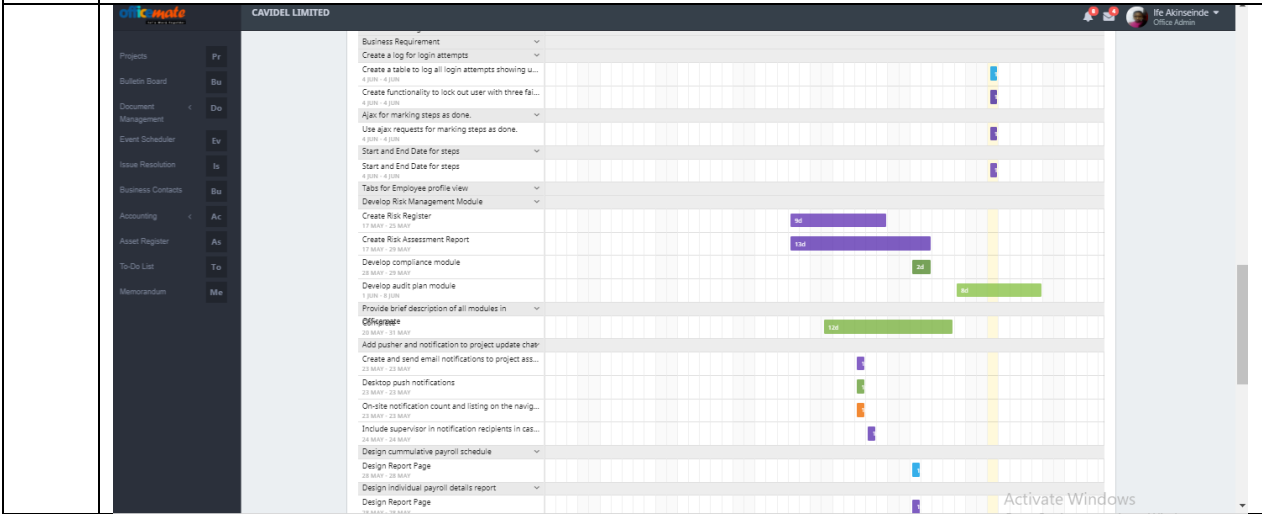
Assign To: *
 Assign To...

Due Date: *
 End Date

Save Cancel

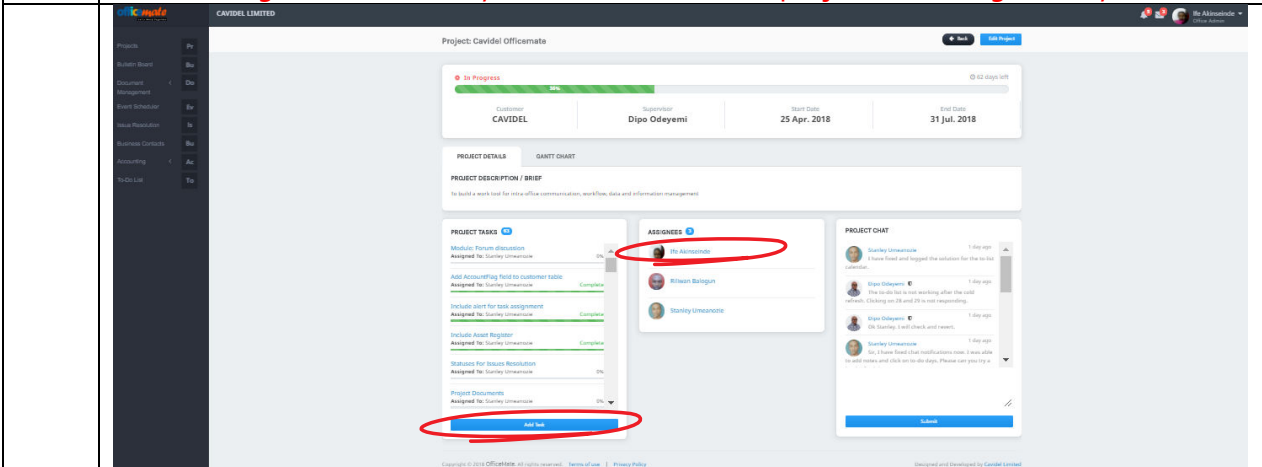
- 5 **Gantt Chart:** This is a visual view of tasks scheduled over time in a project. They are used for planning projects of all sizes and they are a useful way of showing what work

	is scheduled to be done on a specific day. They also help you view the start and end dates of a project in one simple view.
--	---



6	Viewing Project Task Assigned to you: Go to: Assignees>>Click on your name to view the project task assigned to you.
---	---

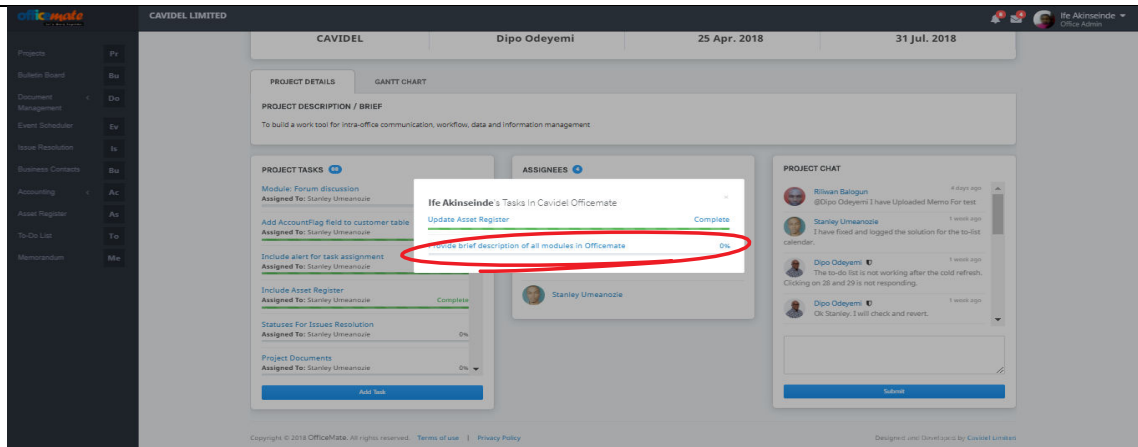
Go to: Assignees>>Click on your name to view the project task assigned to you.



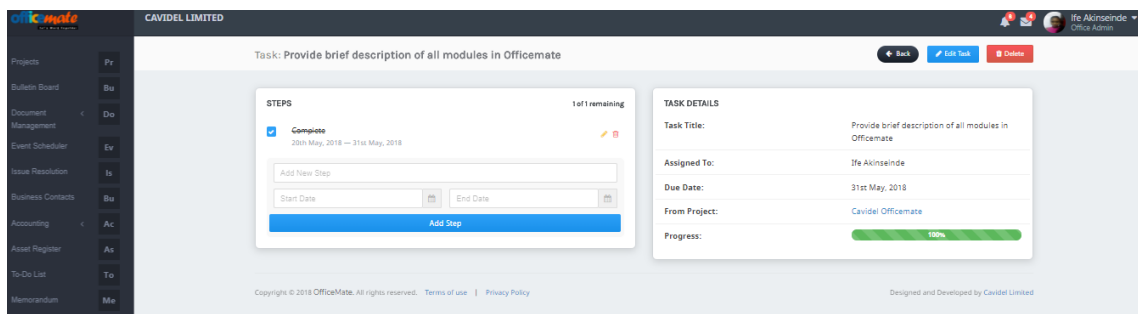
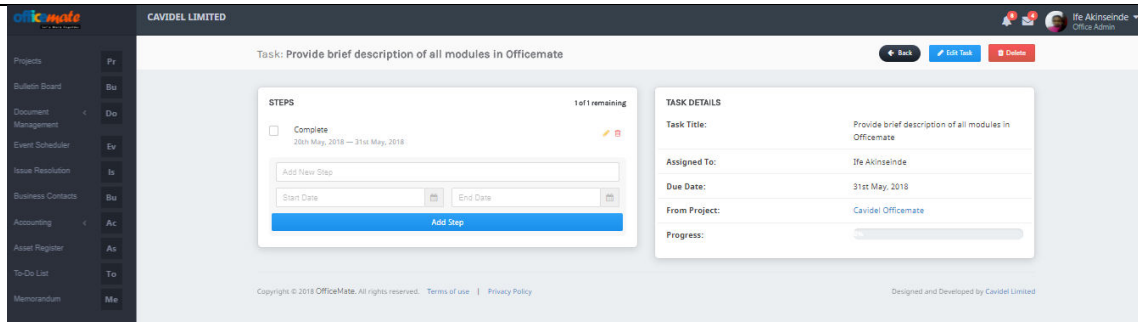
7	<p>Task View: This shows the various tasks assigned to you under the project title "Cavidel Officemate". Also, you can see the different progress levels for all tasks.</p> <p>Note: 0% indicates that the task hasn't been started and is not complete</p> <p>To complete task, click on the task that is not indicating "complete"</p>
---	--

Note: 0% indicates that the task hasn't been started and is not complete
To complete task, click on the task that is not indicating "complete"

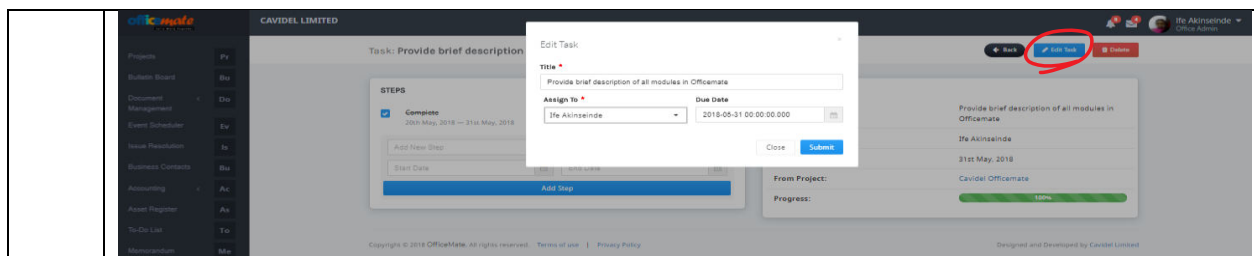
To complete task, click on the task that is not indicating "complete"



- 8 **Completing a task assigned to you: Add task steps**
 Enter the necessary steps needed to complete the task and assign the start and end dates of the steps.
 Below you can see that a step “complete” has been added but the box hasn’t been checked.
 Once you have completed the step you have to mark the check box.



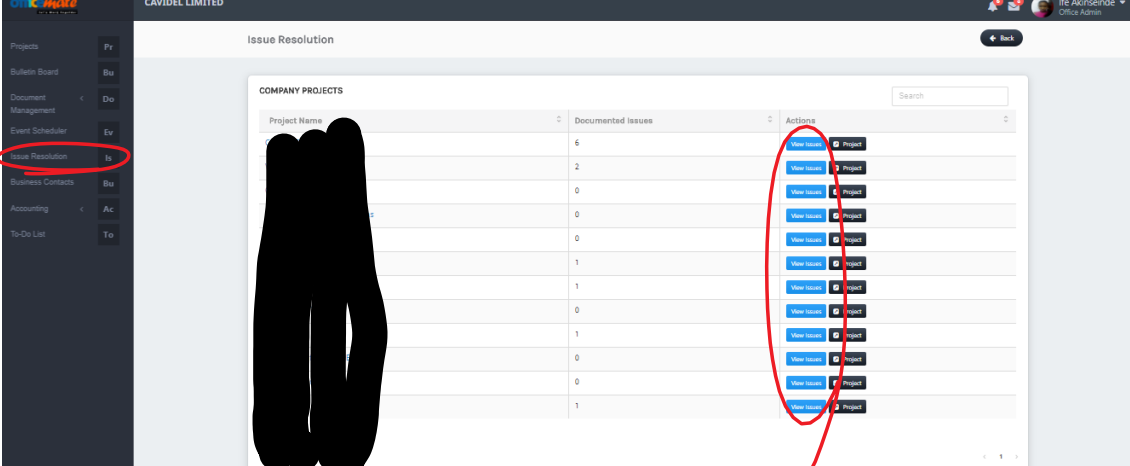
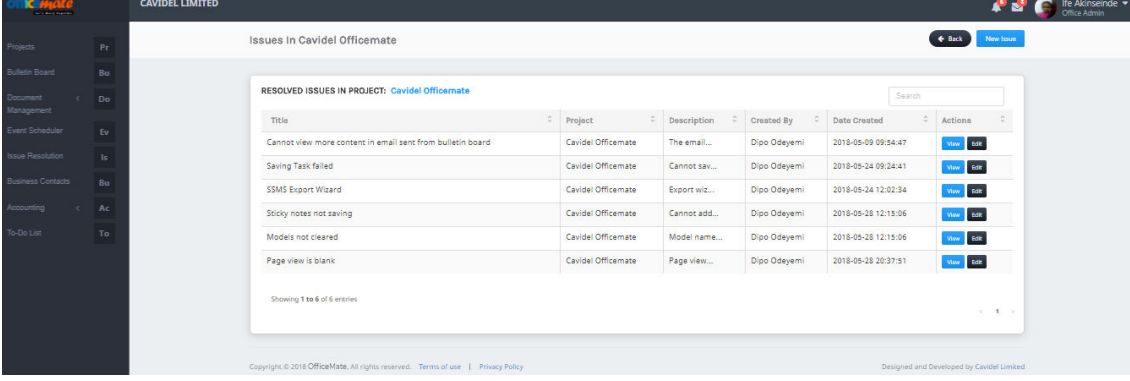
- 6 **To edit task: Click on the “edit” to modify task details.**

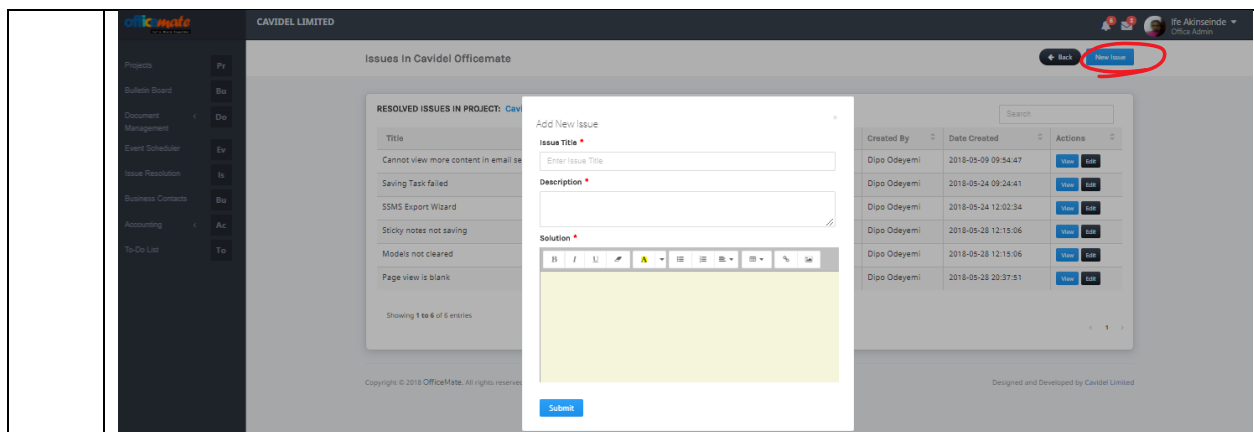


G. Module: Event Scheduler

Step	Procedure
1	<p>This is where company events such as meetings, appointments, workshops, conferences and so on are set up to inform all staff about the occurrence of those special events.</p> <p>Go to: Event Scheduler>></p>
2	<p>New Event: Admin and employees can add events, tasks and actions to take place in the future.</p> <p>Go to: Event Scheduler>>Click on New Event</p>

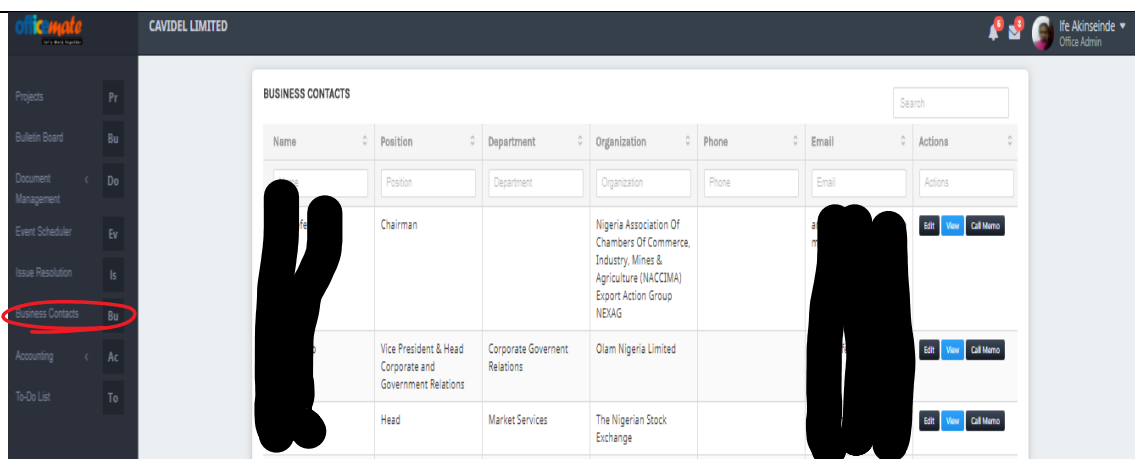
H. Module: Issue Resolution

Step	Procedure
1	<p>Issue Resolution: This is a project issue management tool that is used for identifying, reporting and communicating what is happening in a project. Also, it is used for capturing issues resolution and serves as a knowledge base for the institution.</p> <p>Go to: Issue Resolution</p> <p>It displays the listing of all the company projects and their documented issues and solutions.</p>
	
2	<p>Issues View: It displays the issues that have been logged for a particular project and gives option to edit to make changes if needed.</p> <p>Go to: Issue Resolution>> Click on the project title>>Issues View>>Edit</p>
	
3	<p>Documenting Issues (Issue Log):</p> <p>Go to: Issue Resolution>>Click on the project you want to document the issue. Then click on the button "New Issue" and type the issue information.</p>



I. Module: Business Contacts

Step	Procedure
1	<p>Business Contacts: This is a business contact manager tool that is used to organize and store information about the people you do business with. It displays the listing of all current and potential clients.</p> <p>Go to: Business Contacts</p>
2	<p>Edit and View: It enables you to view and modify or change the contact information inputted.</p> <p>To Edit: Go to: Business Contact>> Click on Edit>>Change the information you want and click submit.</p> <p>To View: Go to: Business Contact>>Click on View</p>



3 New Business Contact:

Go to: Click on New Contact and enter the contact information.

4 Meeting Note: It is for recording conversations in meetings held via telephone, face to face, video conference, chat rooms etc. It captures discussions and action points from the meeting and provides users with the ability to give feedback and current status of action points. It also provides the opportunity to send emails to all attendees. Employees can view meeting note sent to business contact.

Go to: Business Contacts>>Call Memo

5 Edit Memo:

Go to: Business contacts>>Click on memo>>New memo

CAVIDEL LIMITED

OFFICEMATE > CREATE_CALL_MEMO

CREATE CALL MEMO - ADE ADEFEKO

Attendees:

Location:

Handouts:

Meeting Date:

Discussion Submit

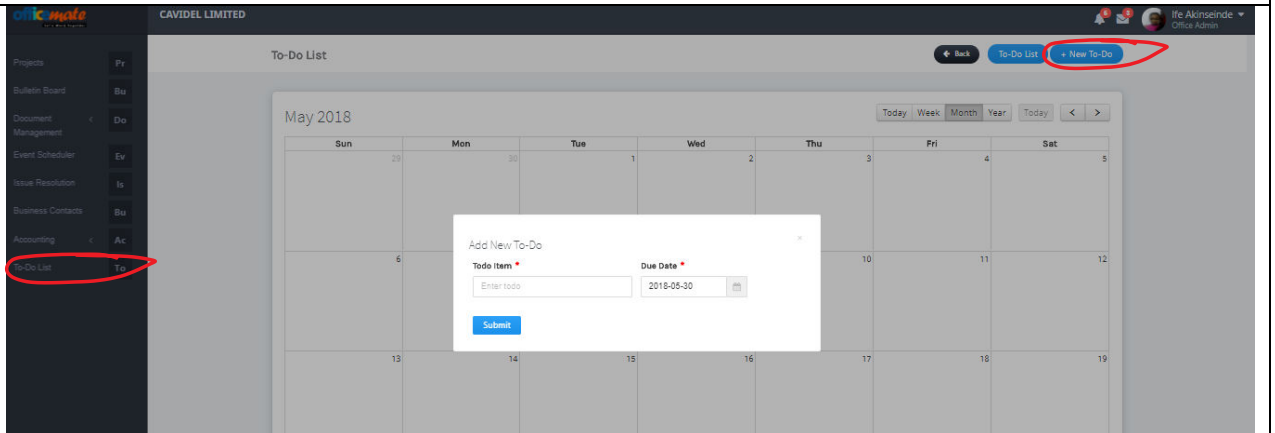
Copyright © 2018 OfficeMate. All rights reserved. Terms of use | Privacy Policy

Designed and Developed by Cavidel Limited

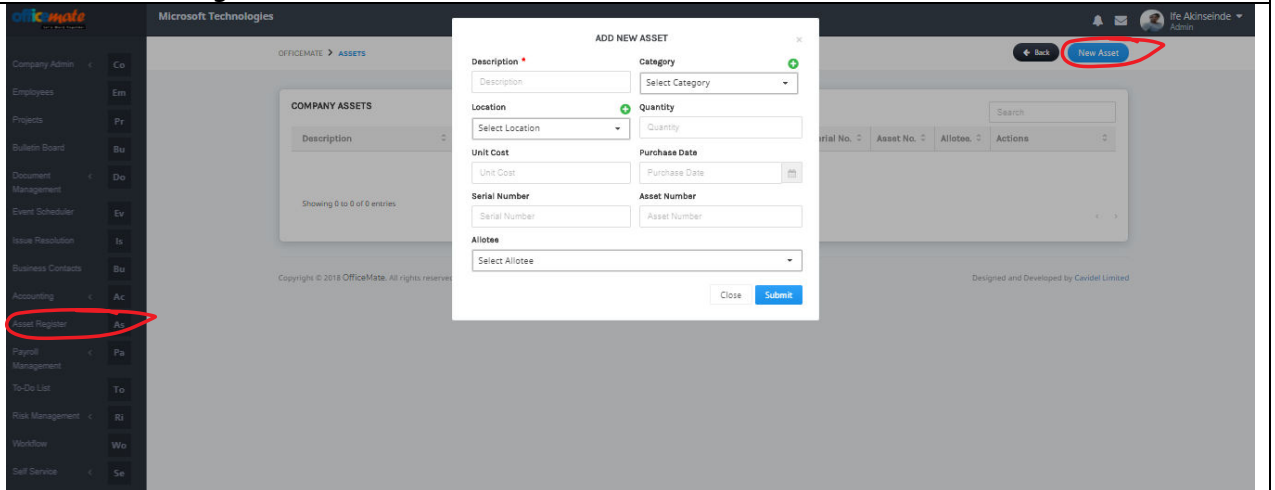
J. Module: Self Service

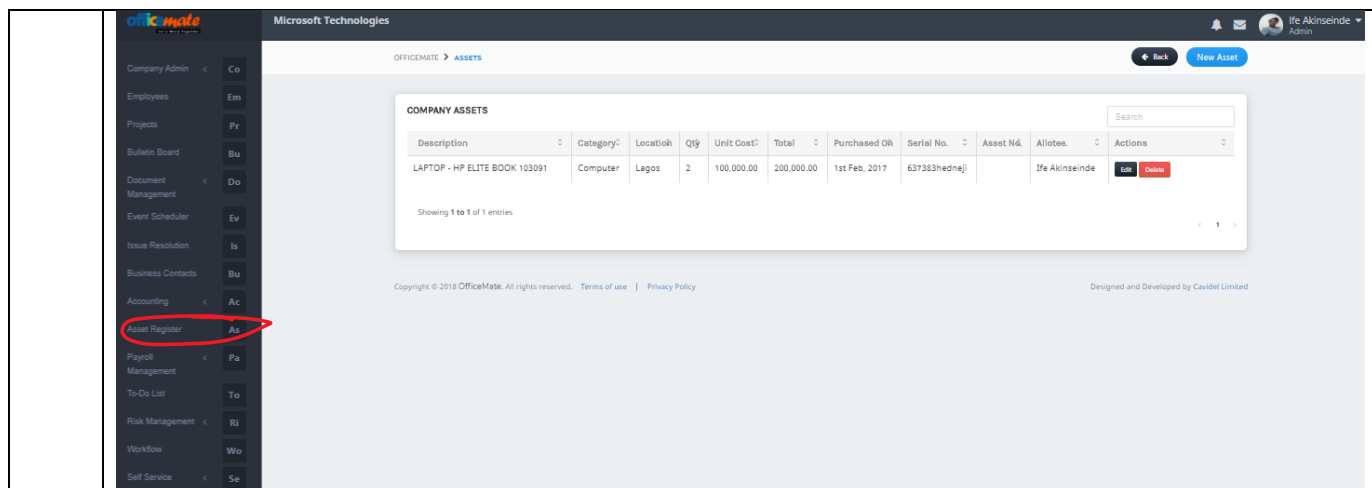
Step	Procedure															
1	<p>Internal Memo: A note written to one's supervisor requesting for approvals. It is used for internal communication in the company.</p> <p>Go to: Self Service>>Memos</p>															
	<p>CAVIDEL LIMITED</p> <p>Internal Memo</p> <p>YOUR MEMOS</p> <p>UNSENT MEMOS SENT MEMOS MEMO INBOX</p> <table><thead><tr><th>SUBJECT</th><th>PURPOSE</th><th>BODY</th><th>STATUS</th><th>ACTIONS</th></tr></thead><tbody><tr><td>Testing Testing</td><td>Testing</td><td>Hello Sir, Kindly find attached files. More Details 2 attachments</td><td>Approved</td><td>Edit Send</td></tr><tr><td>New Test</td><td>Testing Phase</td><td>Kindly, find attached file. More Details 2 attachments</td><td>Approved</td><td>Edit Send</td></tr></tbody></table> <p>Showing 1 to 2 of 2 entries</p> <p>Copyright © 2018 OfficeMate. All rights reserved. Terms of use Privacy Policy</p> <p>Designed and Developed by Cavidel Limited</p>	SUBJECT	PURPOSE	BODY	STATUS	ACTIONS	Testing Testing	Testing	Hello Sir, Kindly find attached files. More Details 2 attachments	Approved	Edit Send	New Test	Testing Phase	Kindly, find attached file. More Details 2 attachments	Approved	Edit Send
SUBJECT	PURPOSE	BODY	STATUS	ACTIONS												
Testing Testing	Testing	Hello Sir, Kindly find attached files. More Details 2 attachments	Approved	Edit Send												
New Test	Testing Phase	Kindly, find attached file. More Details 2 attachments	Approved	Edit Send												
2	<p>New memo: Creating a new memo</p> <p>Select the approval levels- supervisors or managers required to approve requests.</p> <p>Can attach multiple files if needed.</p> <p>Go to: Click on New memos</p>															

K. Module: To-Do-List

Step	Procedure
1	<p>This module is a time management tool that is used to organize and prioritize daily tasks more effectively. It is used to view prioritized lists of all the tasks employees need to carry out.</p> <p>Add New To Do: Employees can add their personal activities/task or <u>set reminders</u> and view to do items.</p> <p>Employees can view available to-dos.</p> <p>Go to: To-Do-List>>New To Do</p>
Fig 7	

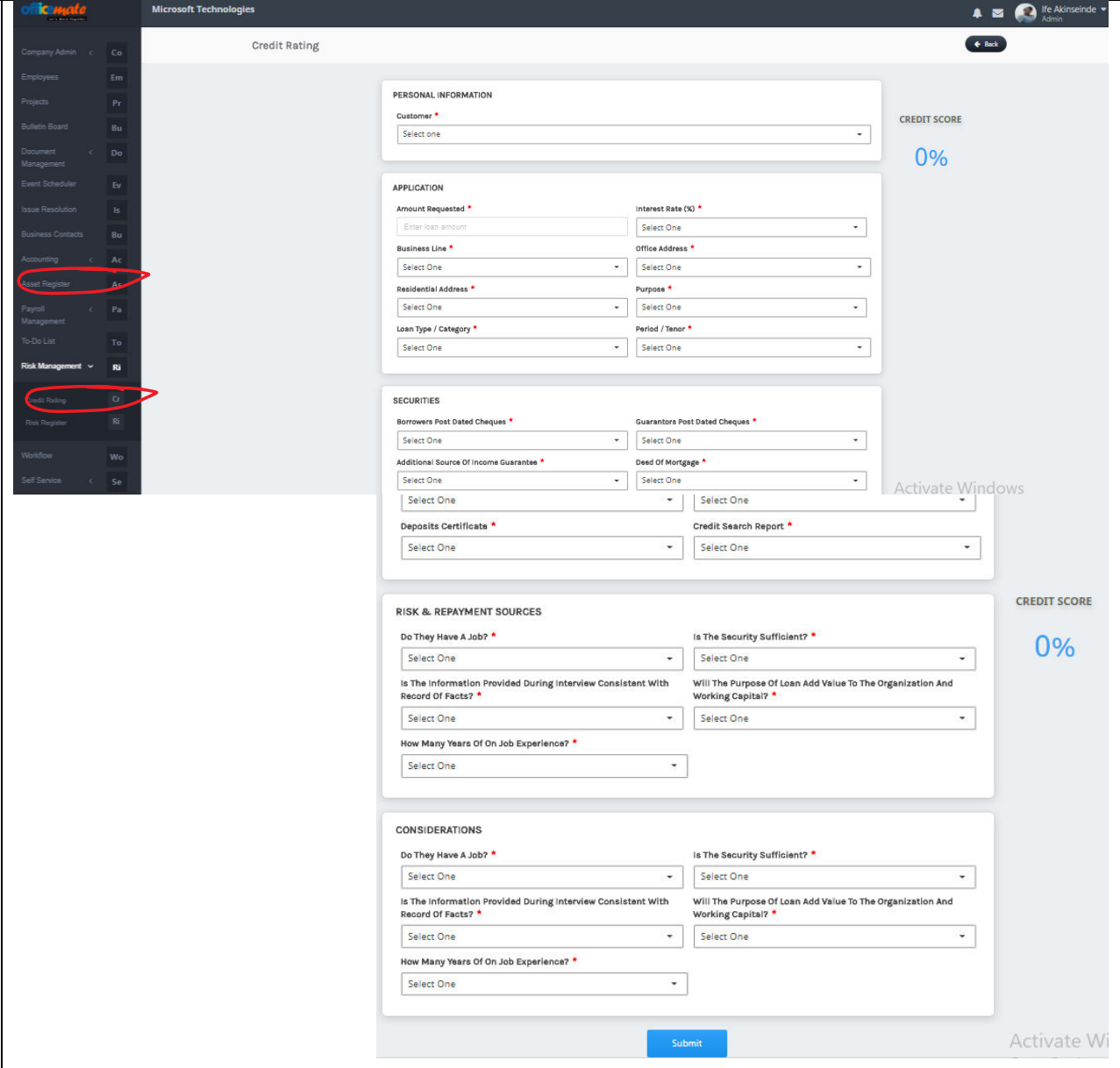
L. Module: Asset Register

Step	Procedure
1	<p>An asset register is a list of the assets owned by a business.</p> <p>New Asset: Admin can add all company assets.</p> <p>Go to: Asset Register>>New Asset</p>
Fig 7	
2	<p>Asset List: It displays pertinent details about each available fixed asset to track their value and physical location. Risk Management: This module is used to track and manage the different level of risk.</p>



M. Module: Risk Management

Step	Procedure
1	<p>Risk Management: This module is used to track and manage the different level of risk.</p> <p>Credit Rating: It is used to determine the risk rating of an employee.</p> <p>Go to: Risk Management>>Risk Rating</p>
Fig 7	
2	<p>New Rating:</p> <p>Click on New Risk Rating</p>

	 <p>The screenshot shows the 'Credit Rating' form in the OfficeMate system. The left sidebar has 'Risk Register' and 'Credit Rating' highlighted. The form is divided into several sections: 'PERSONAL INFORMATION' (Customer), 'APPLICATION' (Amount Requested, Interest Rate, Business Line, Office Address, Residential Address, Purpose, Loan Type / Category, Period / Tenor), 'SECURITIES' (Borrowers Post Dated Cheques, Guarantors Post Dated Cheques, Additional Source Of Income Guarantee, Deed Of Mortgage, Deposits Certificate, Credit Search Report), 'RISK & REPAYMENT SOURCES' (Do They Have A Job?, Is The Security Sufficient?, Is The Information Provided During Interview Consistent With Record Of Facts?, Will The Purpose Of Loan Add Value To The Organization And Working Capital?, How Many Years Of On Job Experience?), and 'CONSIDERATIONS' (Do They Have A Job?, Is The Security Sufficient?, Is The Information Provided During Interview Consistent With Record Of Facts?, Will The Purpose Of Loan Add Value To The Organization And Working Capital?, How Many Years Of On Job Experience?). The 'Credit Score' is displayed as 0%.</p>
3	<p>Risk Register: It is used to monitor and manage the various risks involved in a project. It can be used to document various risk such as finance, project, human resources, and project timeline.</p> <p>Go to: Risk Management>>Risk Register>>New Risk Register</p>

