2018

Officemate User Guide

CAVIDEL

www.cavidel.com

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
22/7/2018	0.3	Updated

1. Introduction

1.1 Scope and Purpose

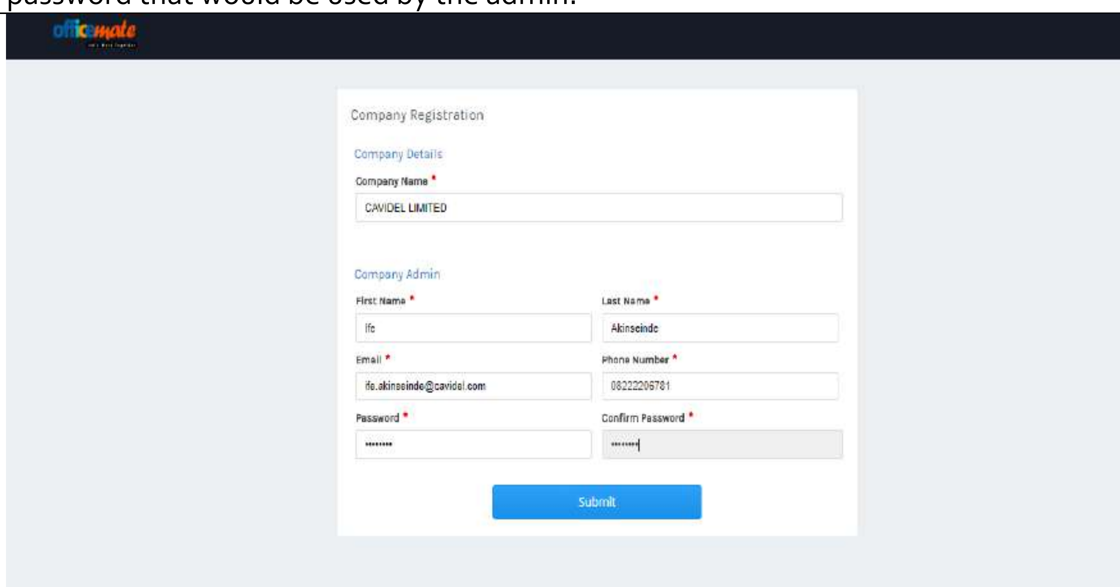
Officemate is an enterprise resource planning (ERP) solution with core functionality to automate business operations through capturing, processing and reporting on customer/employee information, billing, inventory & fleet management, staff appraisal, employee survey, training & learning management, payroll,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

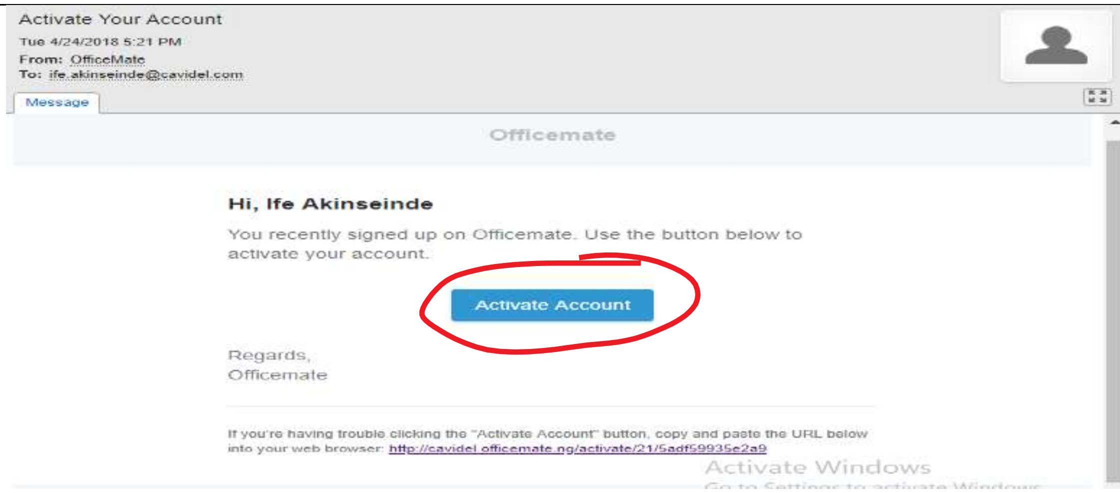
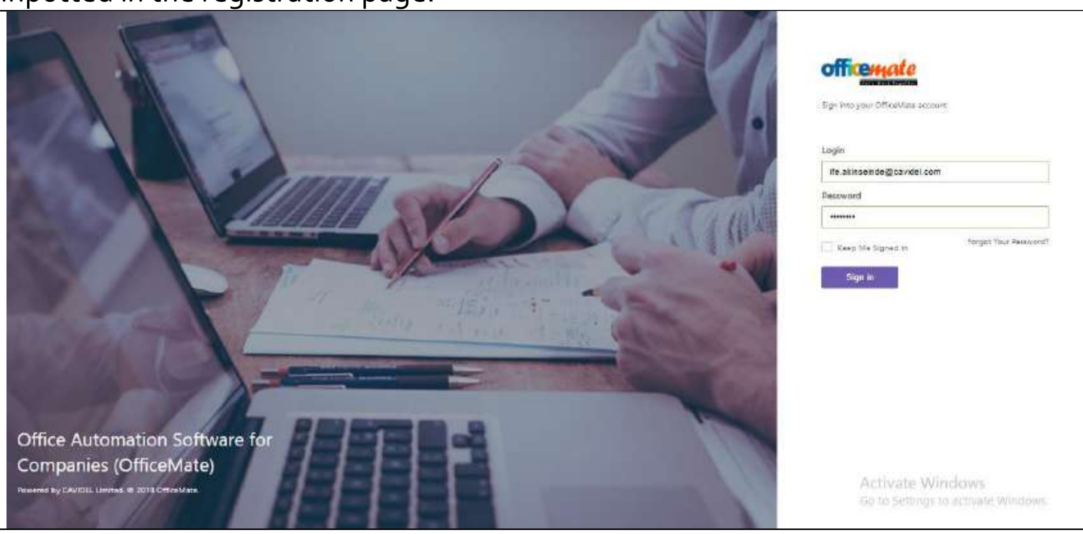
This user guide provides information and instructions needed to set up and use Officemate software. It contains written and visual information such as screen shots taken to assist users to completing the procedures required.

1.2 Getting Started With the Different Modules

Setting up Officemate

A. Company Registration

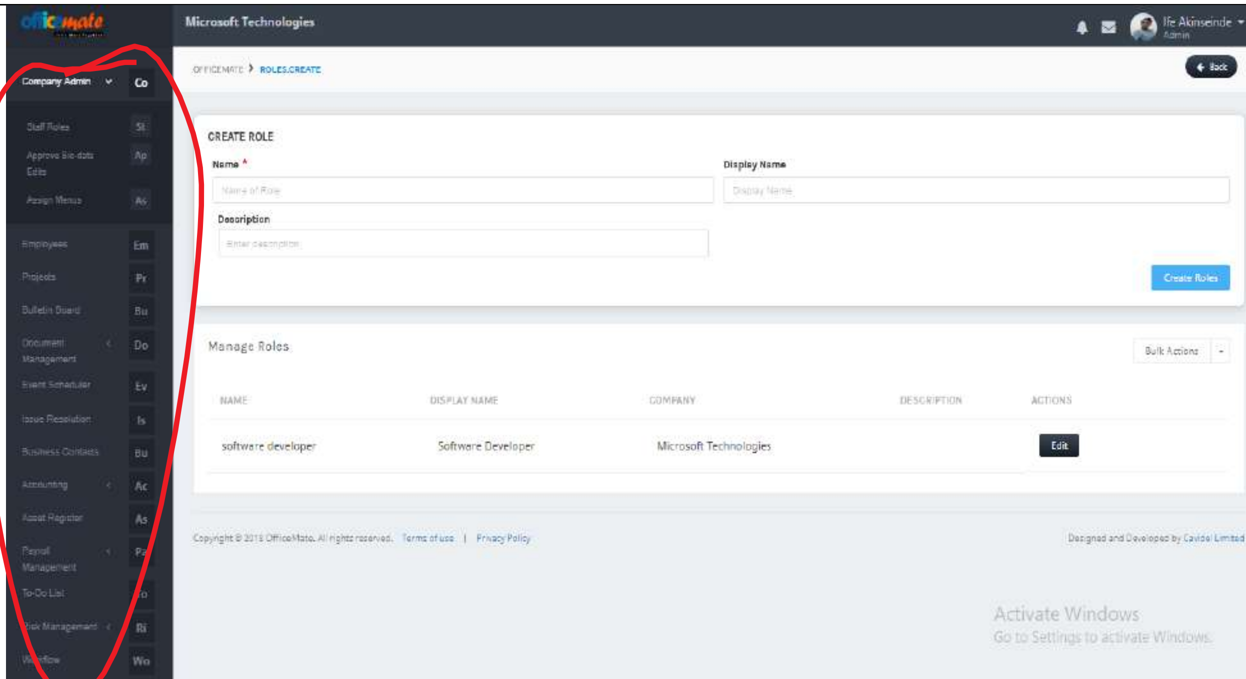
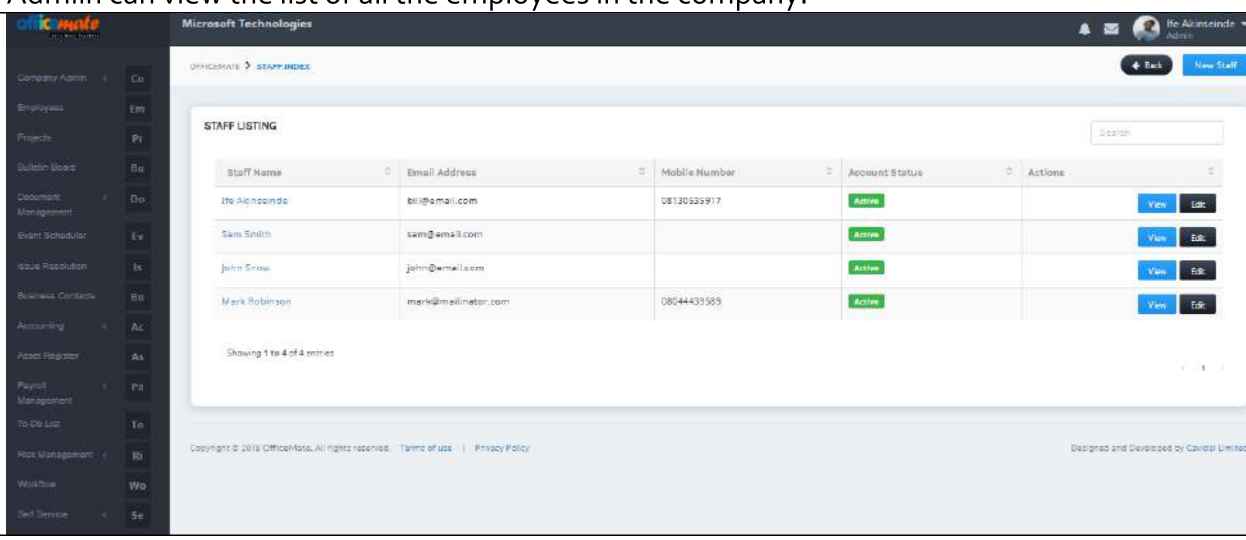
<table>
<tr><th>Step</th><th>Procedure</th></tr>
<tr><td>1</td><td>The company admin registers both the company and the company admin account here.
To setup registration details:
Go to: website>>Registration Page
Type your company name, admin details including company email address and new password that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

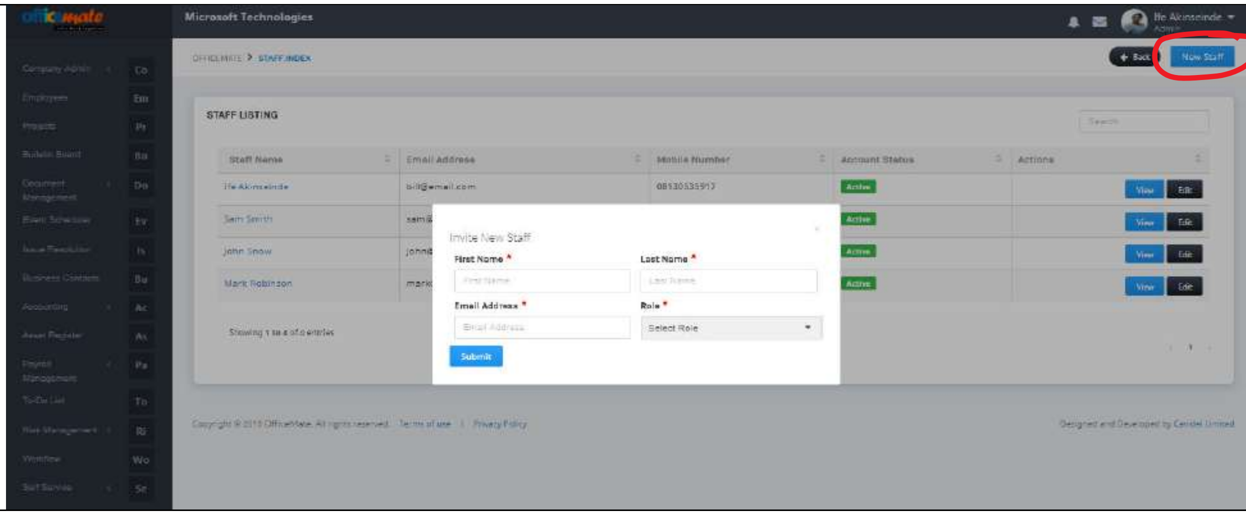
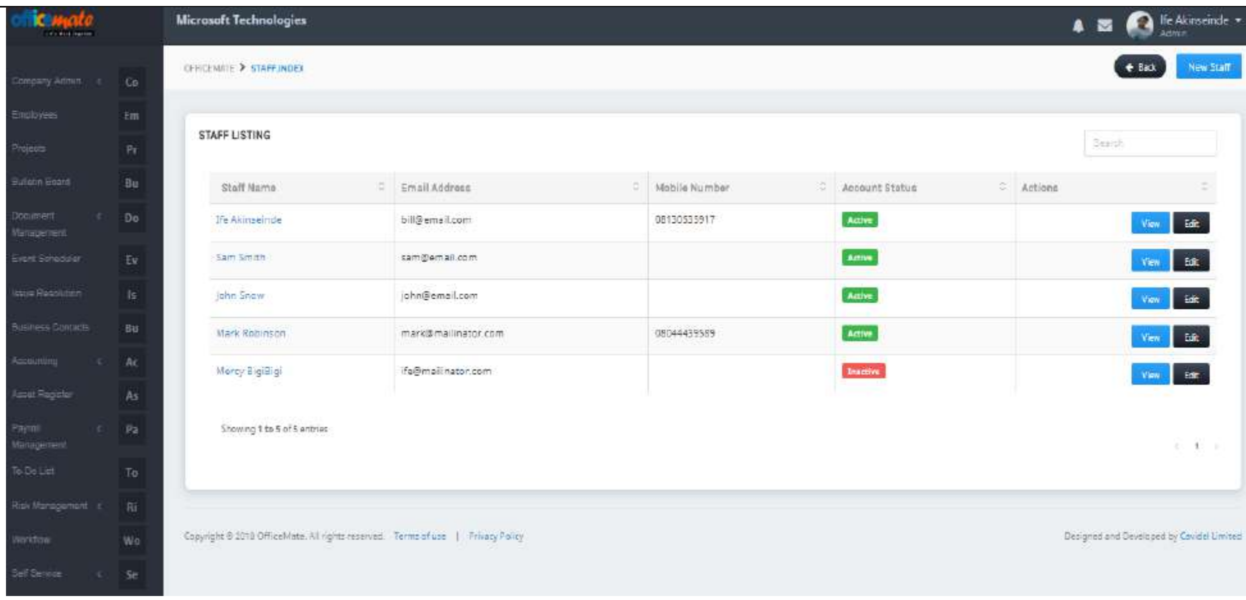
	
3	Admin checks company email for confirmation link and clicks "Activate Account". You will be redirected to the login page to login using the "new password" and "company email address" inputted in the registration page.
	

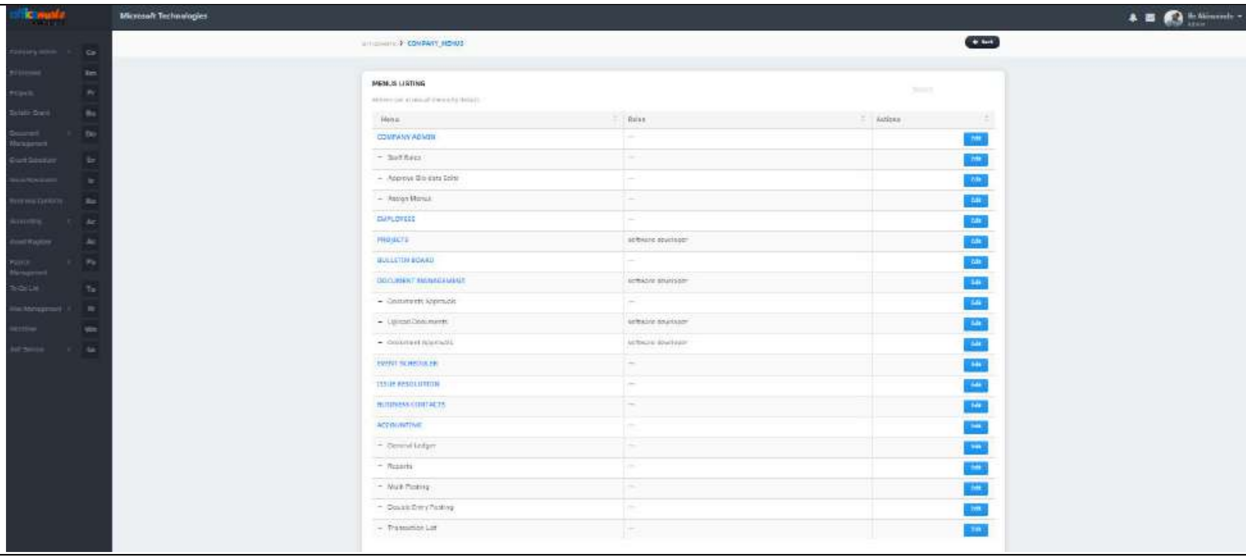
B. Module: Company Admin

A. Employee Onboarding-User Roles by Admin

Step	Procedure
1	**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" **To Edit Role:** Click on "edit" from the table below the role creation page to change or modify the details. **Note: Only the admin has access to create roles. The admin has access to all modules. All modules are circled below for clearer description.**

<table>
<tr><td>2</td><td>
</td></tr>
<tr><td>3</td><td>Invite Staff:
Go to: Employee
This page displays a view of all created staff.
Admin can view and edit staff details here.
Admiin can view the list of all the employees in the company.</td></tr>
<tr><td></td><td>
</td></tr>
<tr><td>4</td><td>Click on “New Staff”
Enter the details of the employee and select the appropriate role.</td></tr>
</table>

<table>
<tr><td></td><td>
</td></tr>
<tr><td>5</td><td>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.</td></tr>
<tr><td></td><td>
</td></tr>
<tr><td></td><td>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.</td></tr>
</table>

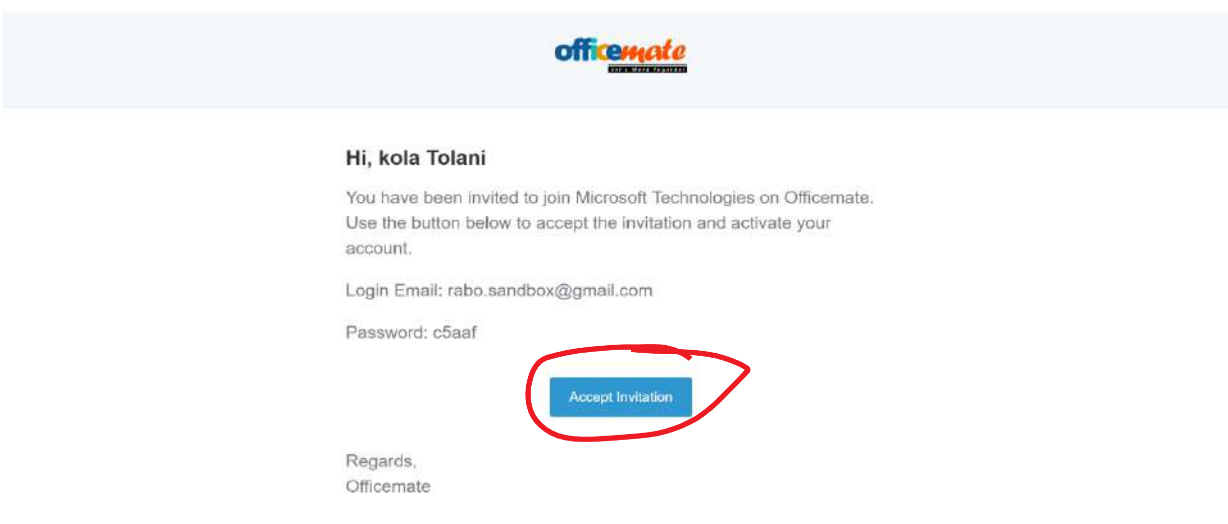
<table>
<tr><td></td><td></td></tr>
</table>

B. Employee Onboarding- Staff

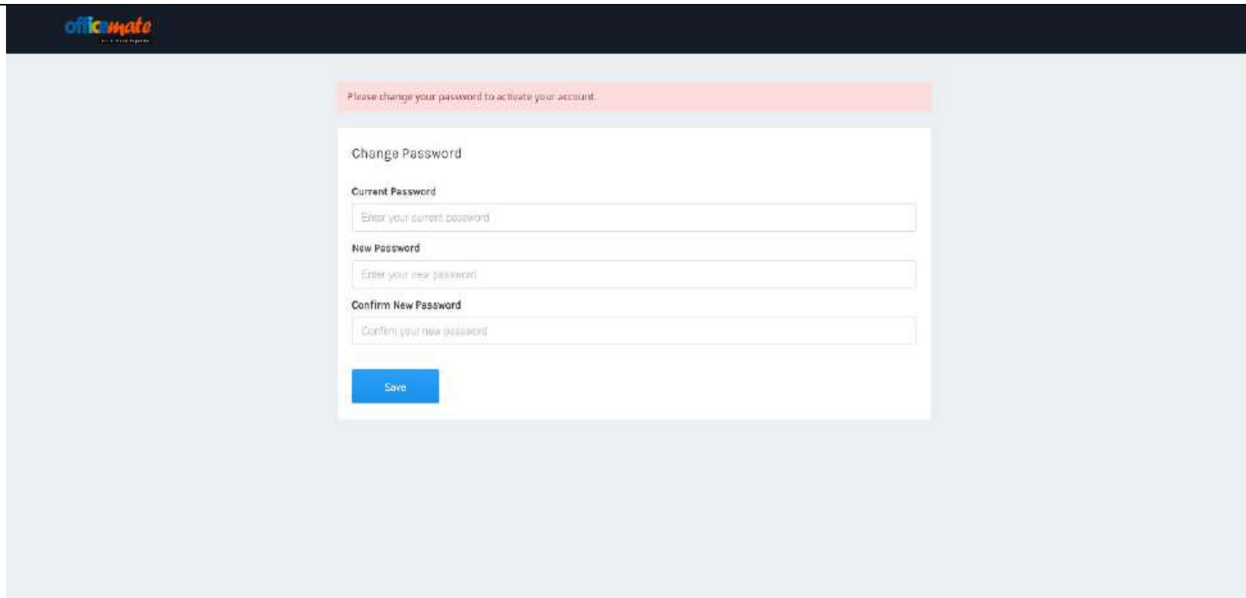
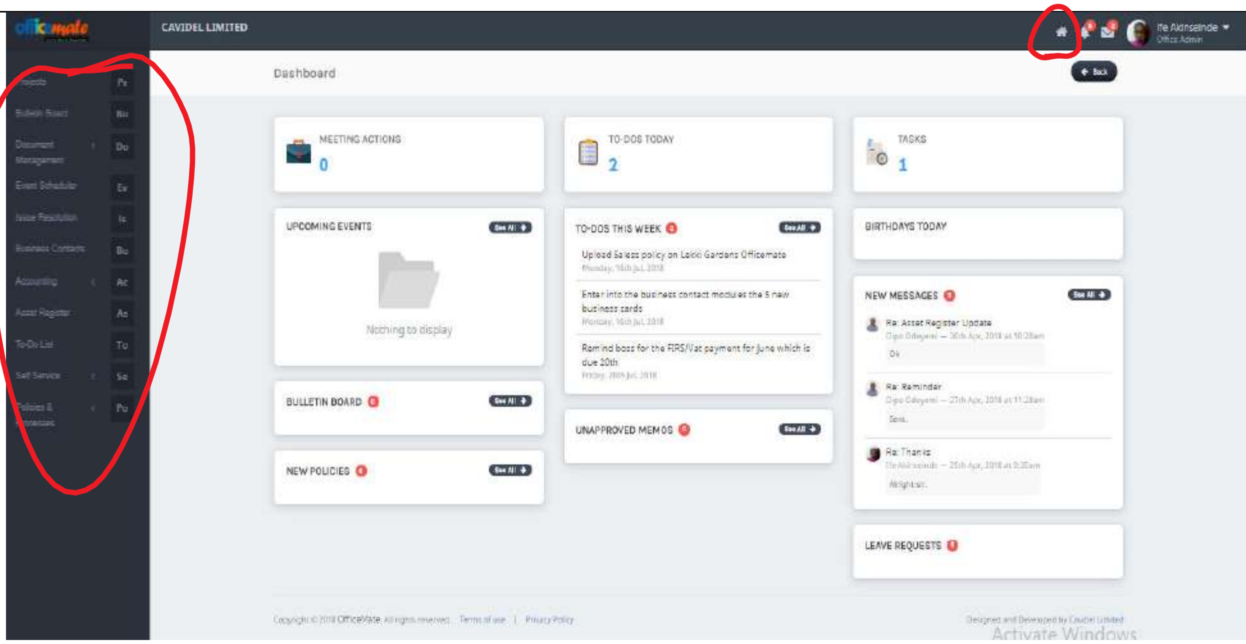
<table>
<tr><th>Step</th><th>Procedure</th></tr>
<tr><td>1</td><td>

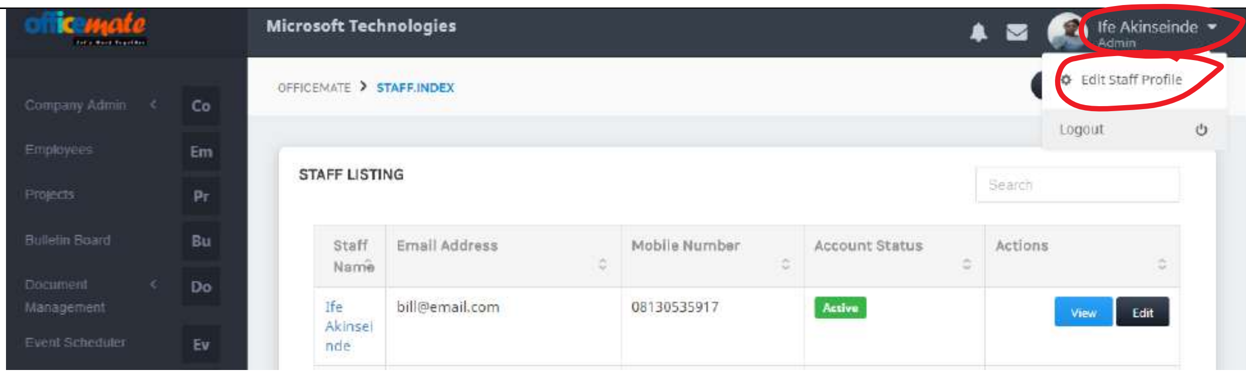
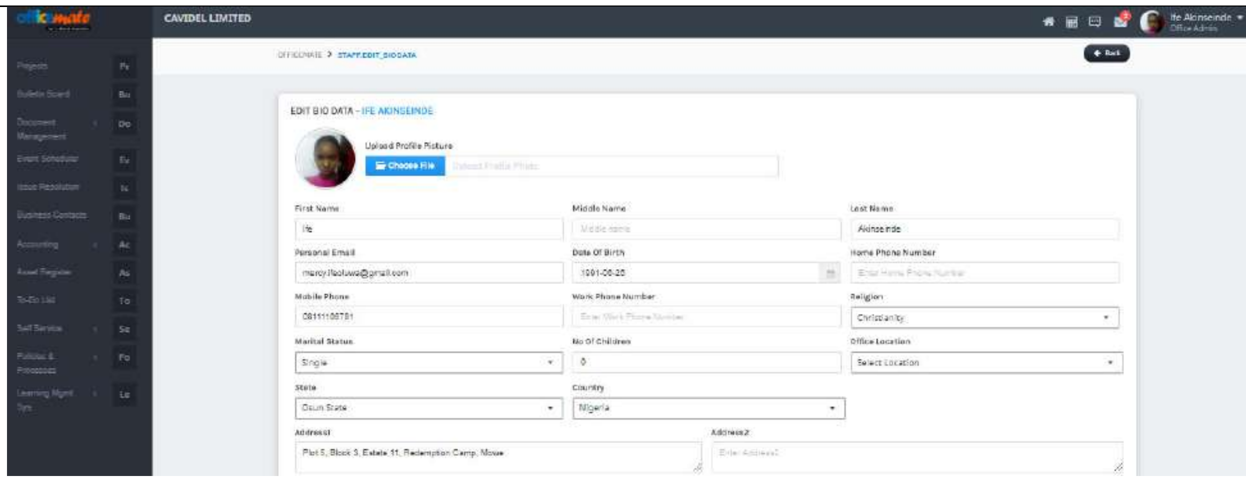
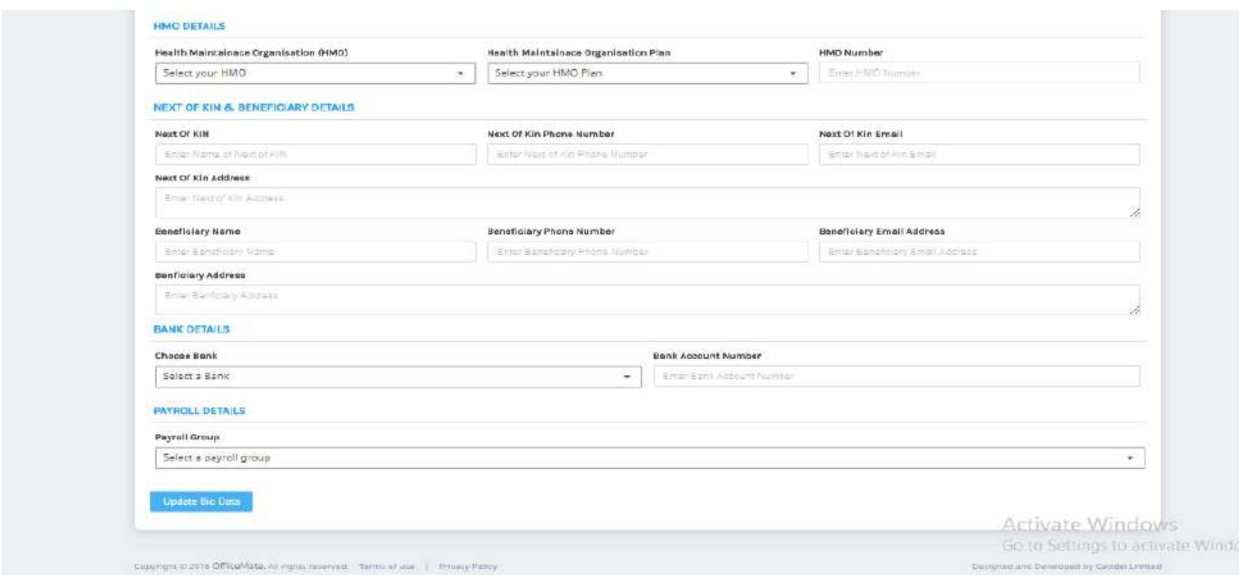
To activate account status: Admin will request staff to check email address for confirmation link.
Staff/New Employee:
Go to: email address>> view and click on invitation link to Login to officemate and activate account.

Note: The email address in the picture below is a sample email and password.



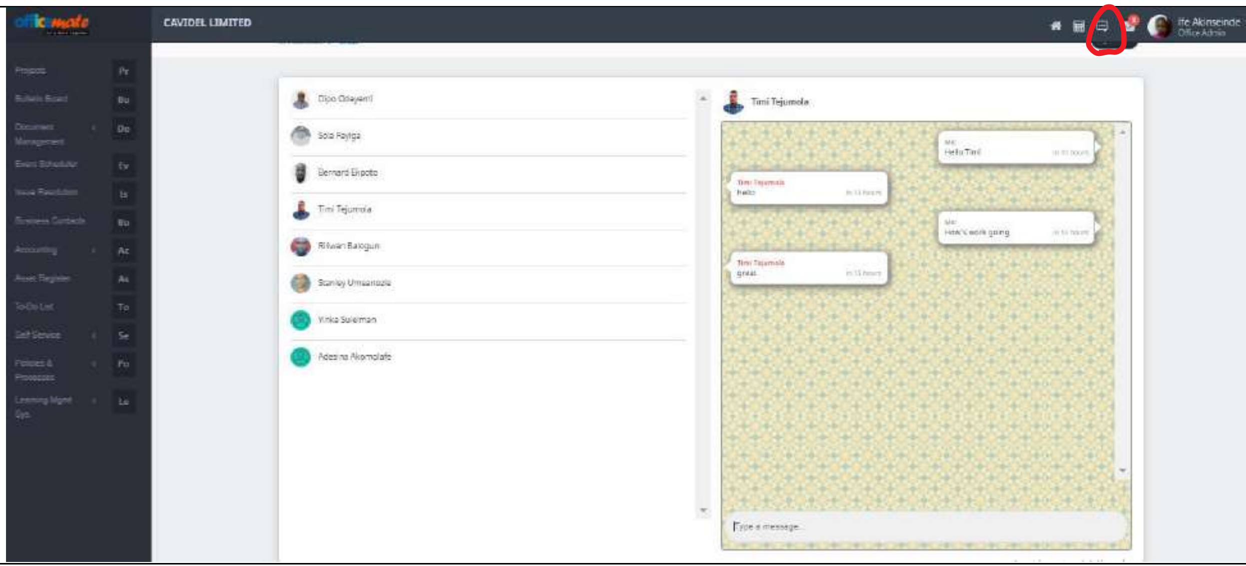
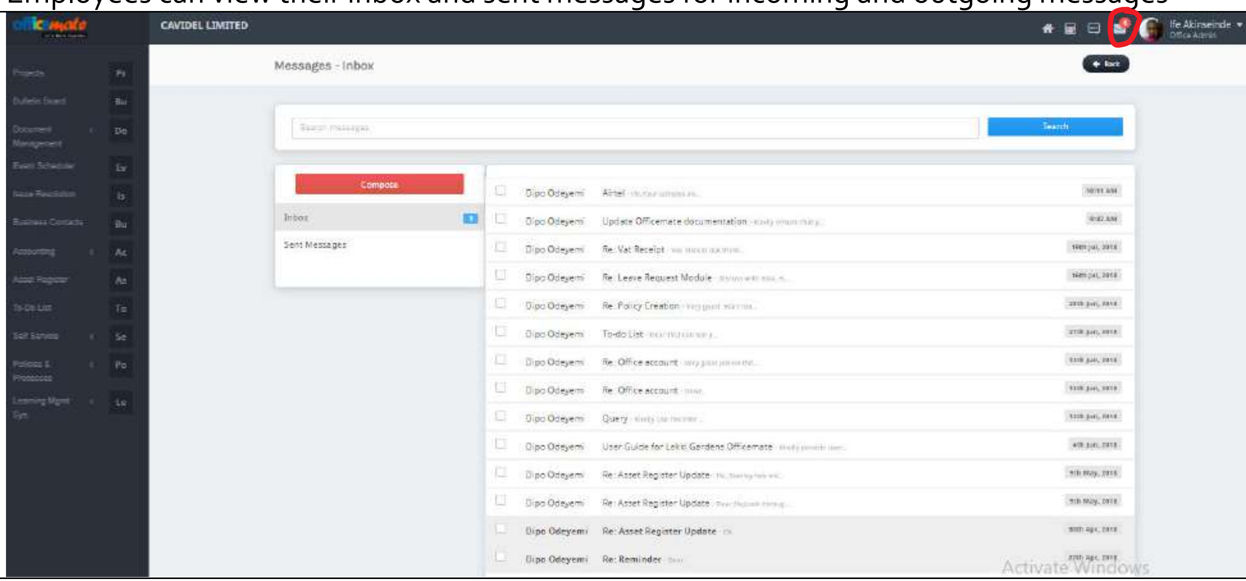
</td></tr>
<tr><td>2</td><td>On-clicking “Accept Invitation”, you will be redirected to a new page to change password.
Note: Current pasword is “ the password in the confirmation email sent to you”</td></tr>
</table>

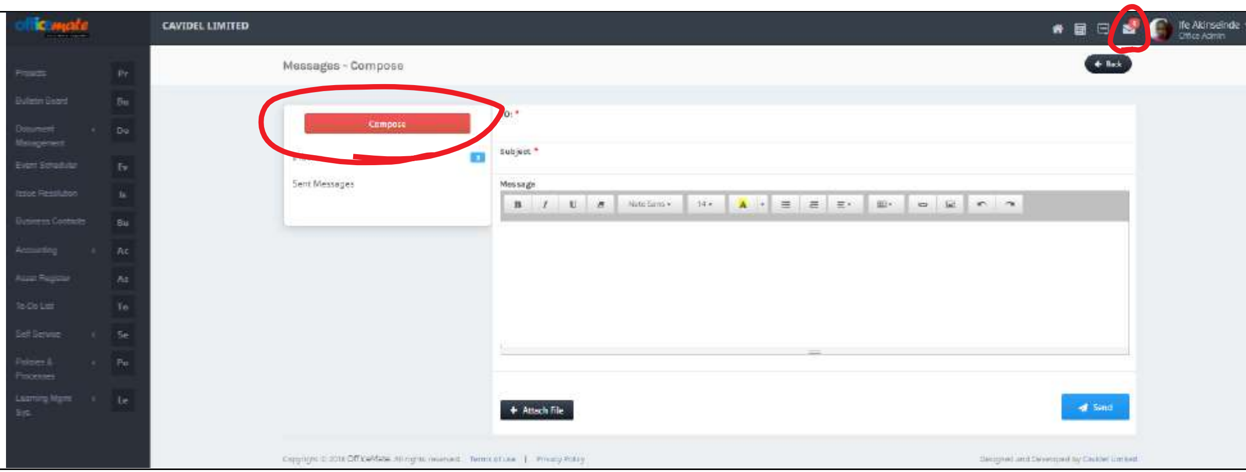
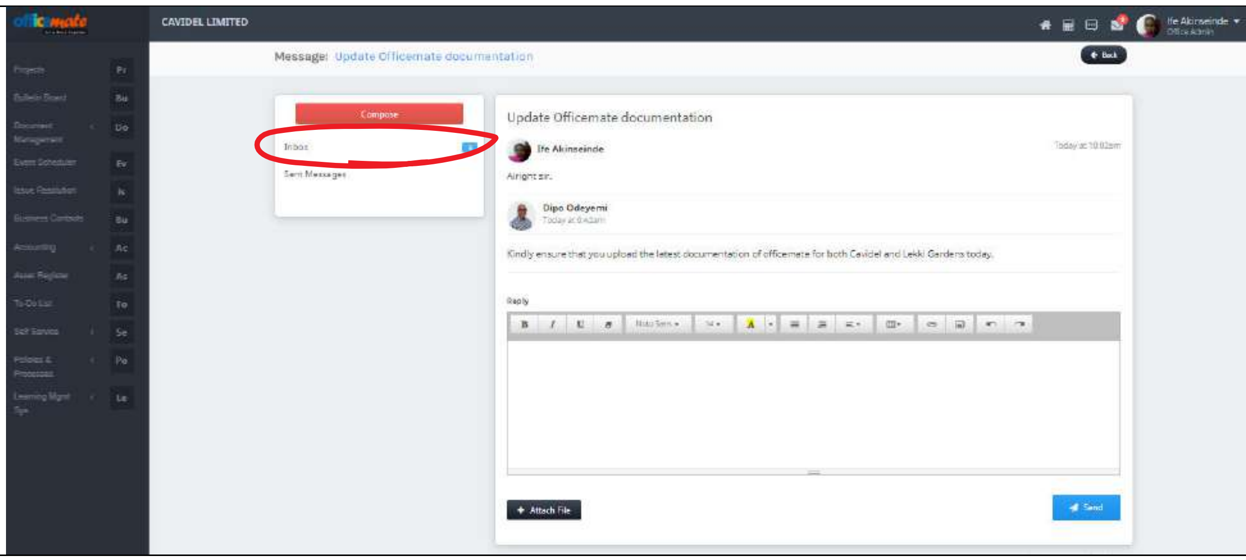
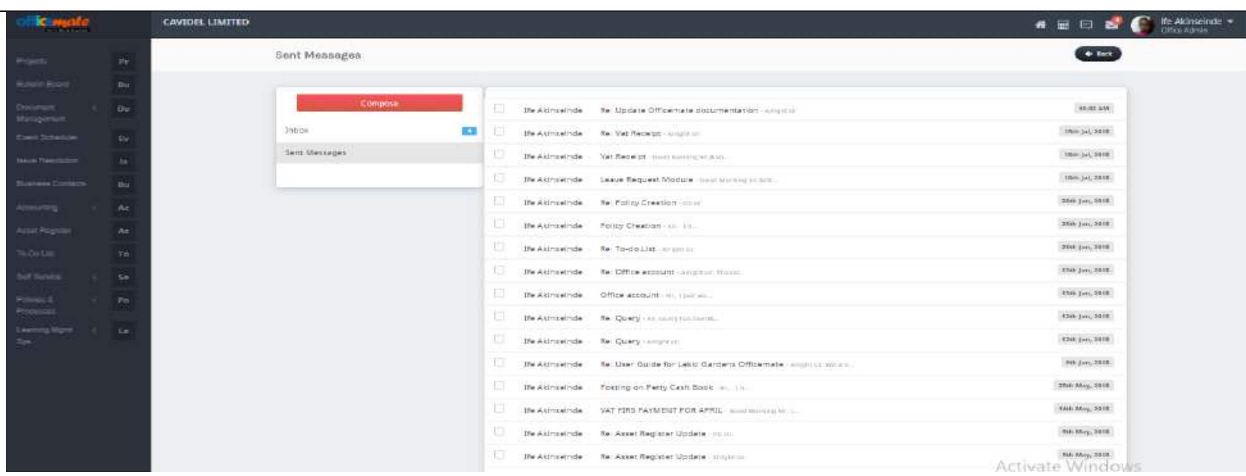
	You are to enter a new password.
	
3	**Dashboard - Employee Display Page** Employees have access to limited modules- Projects, Bulletin Board, Document Management, Event Scheduler, Issue Resolution, Business Contacts, Accounting and To-do-List
	
4	**Staff Profile:** Employees are expected to Login >>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

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

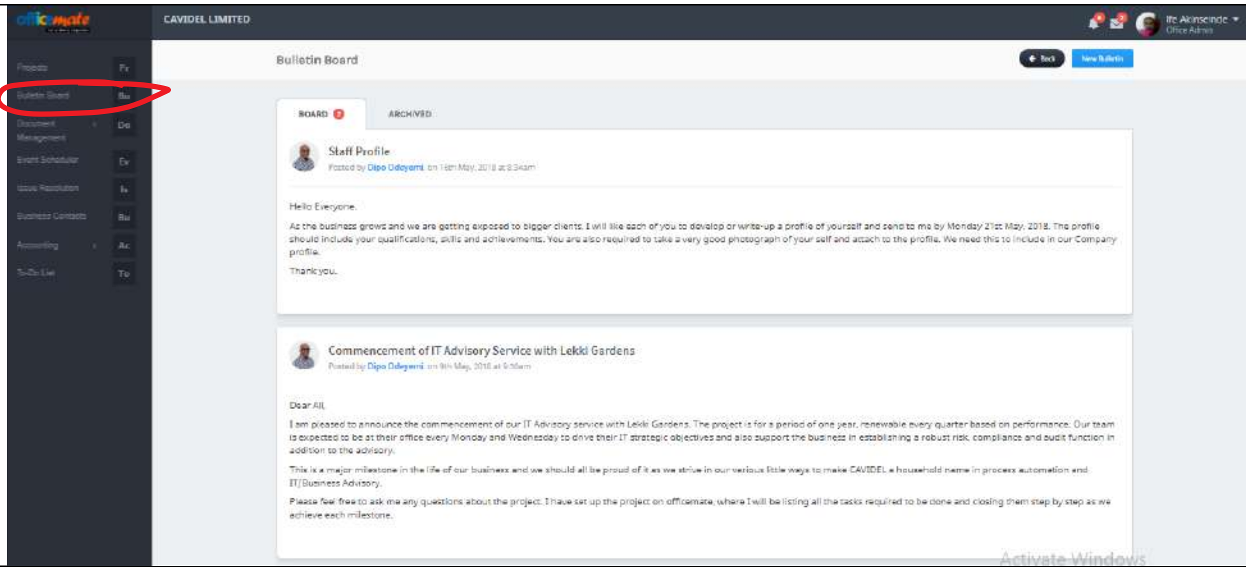
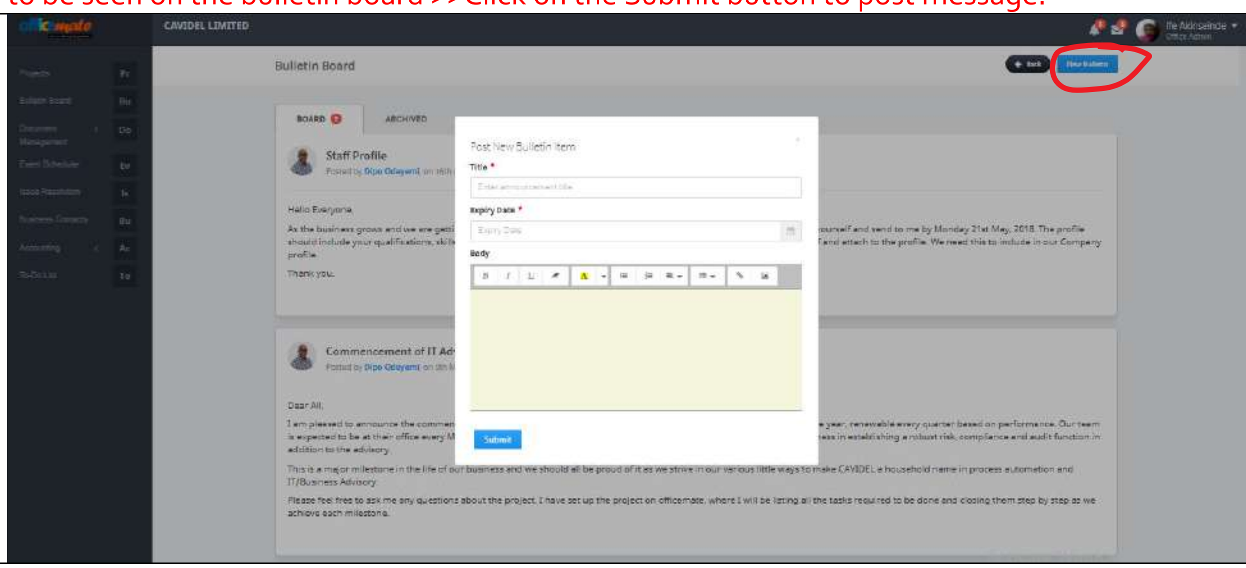
C. Top Right Navigation Bar

Step	Procedure
1	**Notification:** Shows various notification from the different modules in the system Notifications can also be seen from staff emails

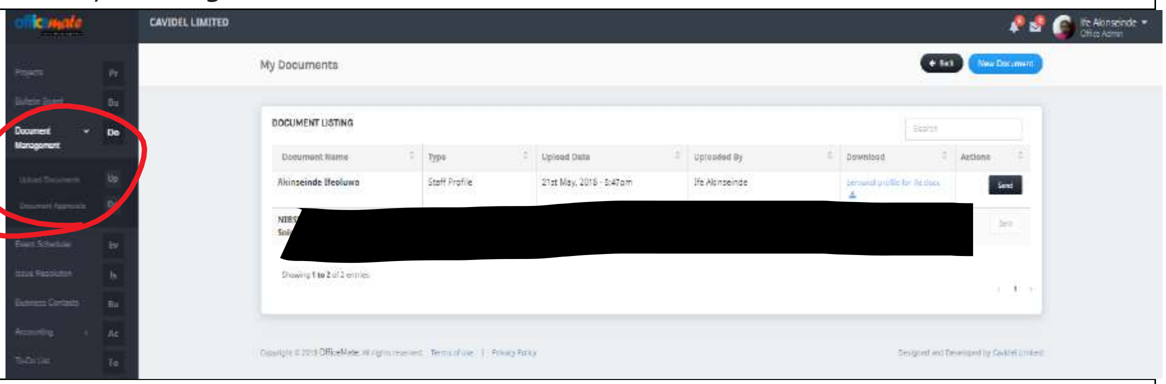
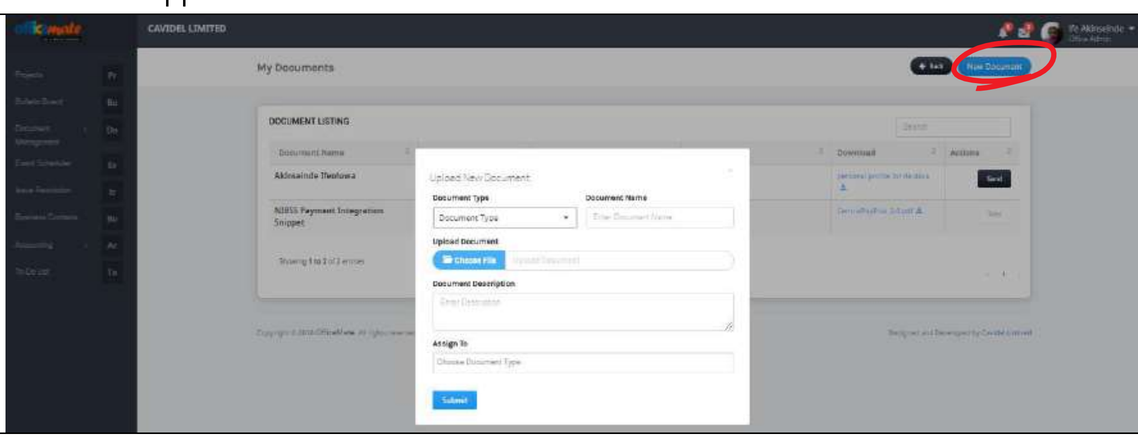
	Go to: Top right navigation bar>>Click on the icon 'chat', view staff to begin a chat and read all chats.
	
2	**Message:** A section for sending new messages and reading received messages. Employees can view their inbox and sent messages for incoming and outgoing messages
	
3	**Compose:** Employees can write and send messages across to colleagues. Click on "Compose" to write message.

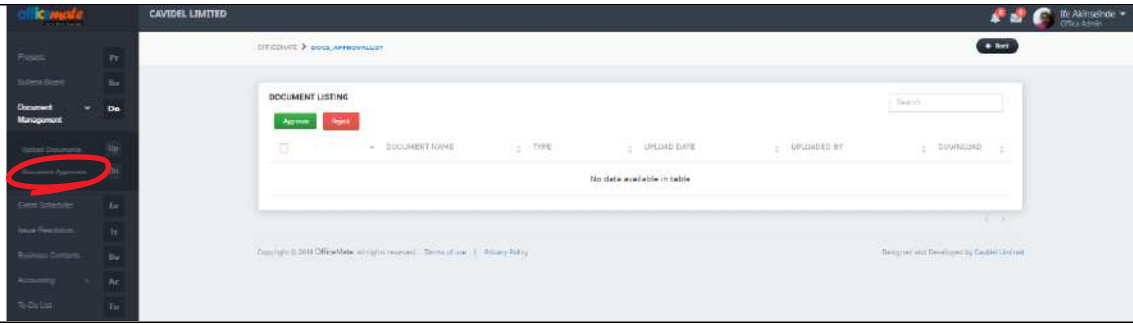
	
3	**Message Inbox:** To view and read a message. You can also respond to a message. Click on 'inbox'.
	
4	**Sent Messages:** Users can view outbox messages. Click on 'Sent Messages.
	

D. Module: Bulletin Board

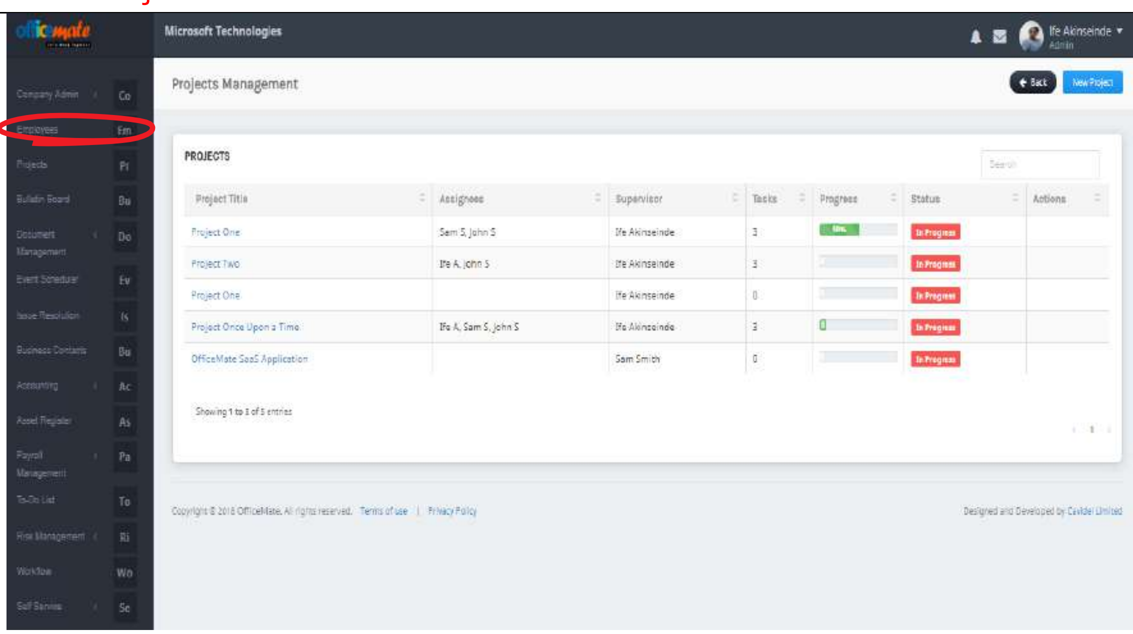
Step	Procedure
1	**Bulletin Board:** This serves as a visual way to communicate with employees through posting of informative announcement. Employee can see a list of all the announcement on the bulletin board **Go to:** Side menu>>Click on Bulletin Board to view announcements on the board.
	
2	**New Bulletin:** Admin can post company announcement on the bulletin board 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.
	

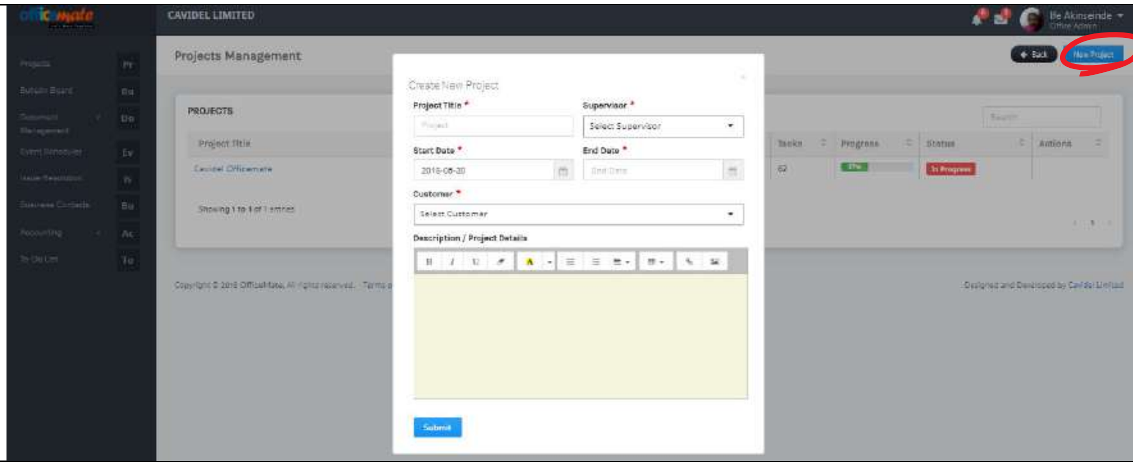
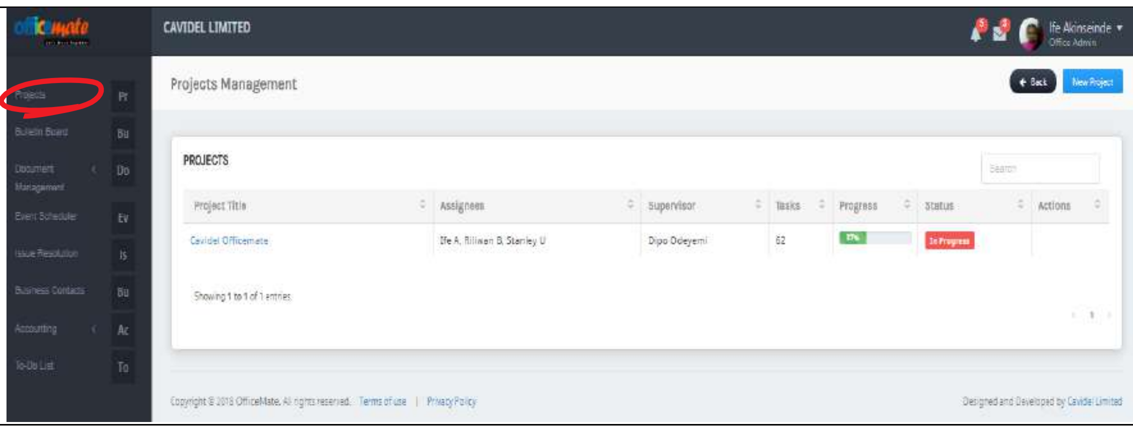
E. Module: Document Management

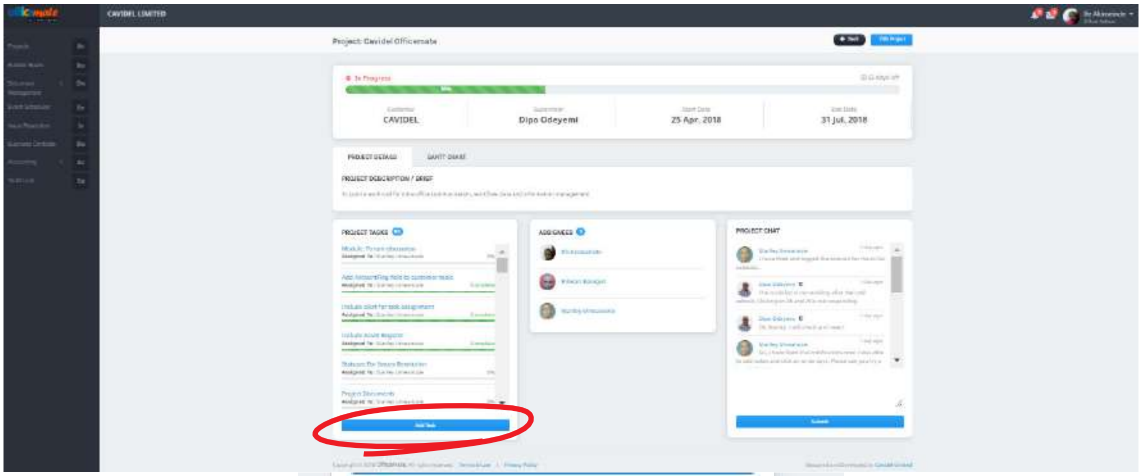
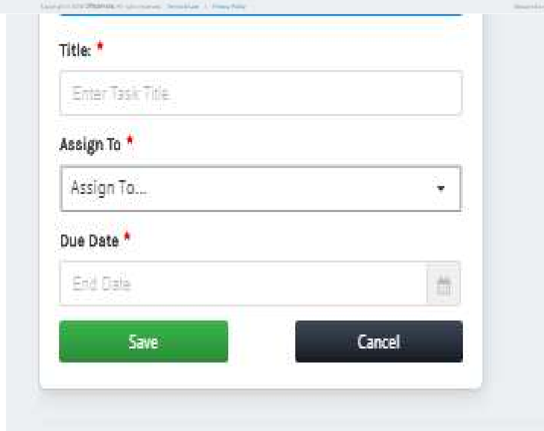
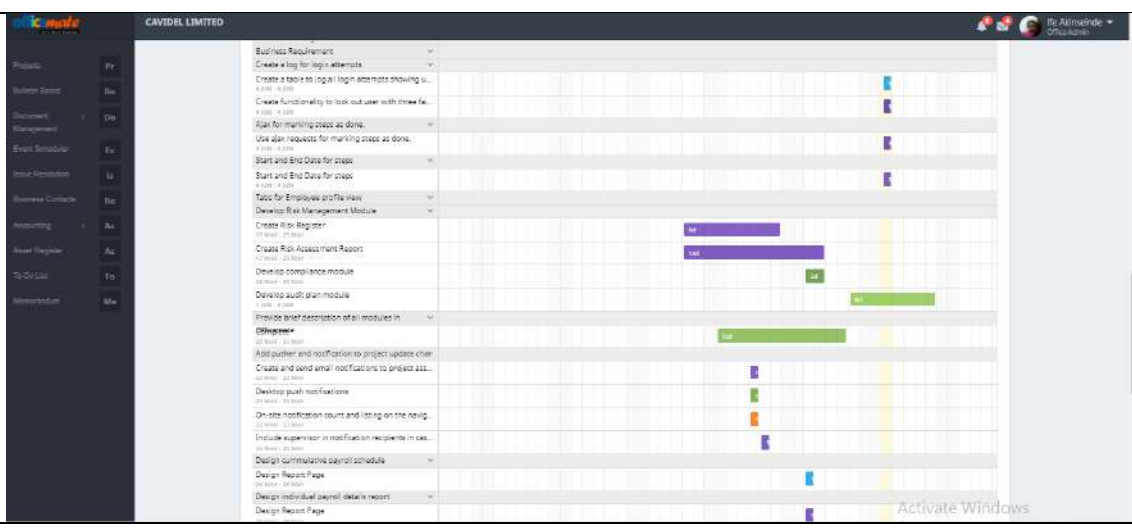
Step	Procedure
1	This is a document management tool that stores, manages and tracks its electronic documents and electronic images of paper based information captured through the use of a document scanner. **Go to:** Document Management>>Upload Documents You can see listing of all the documents that have been uploaded on the system. It keeps a record of the various versions created and modified by different users (history tracking).
	
2	**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 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

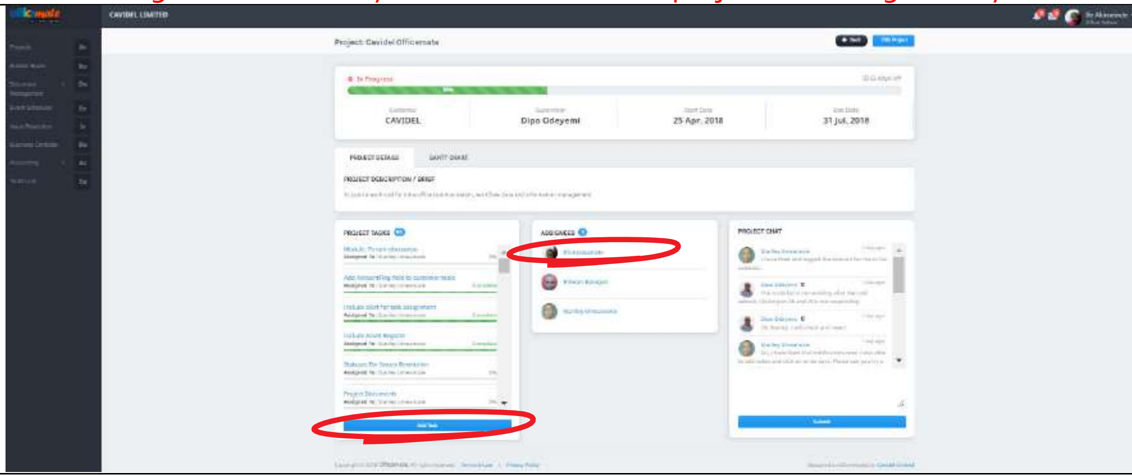
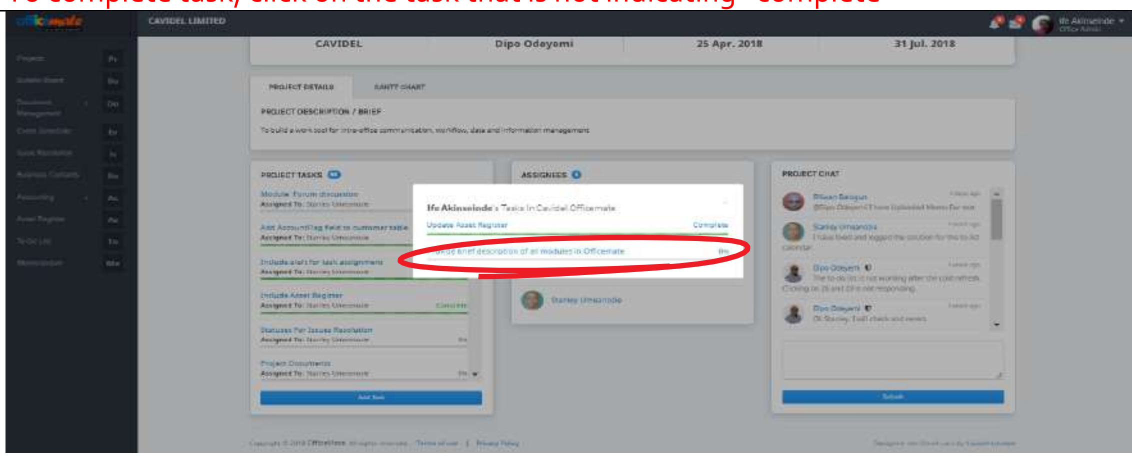
	

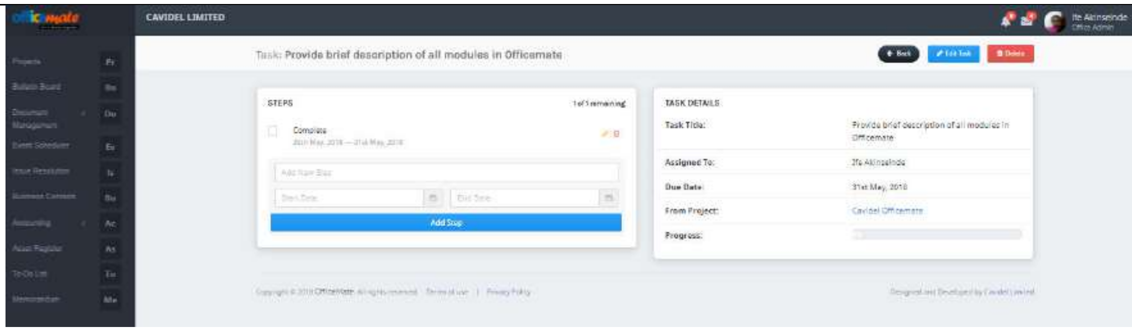
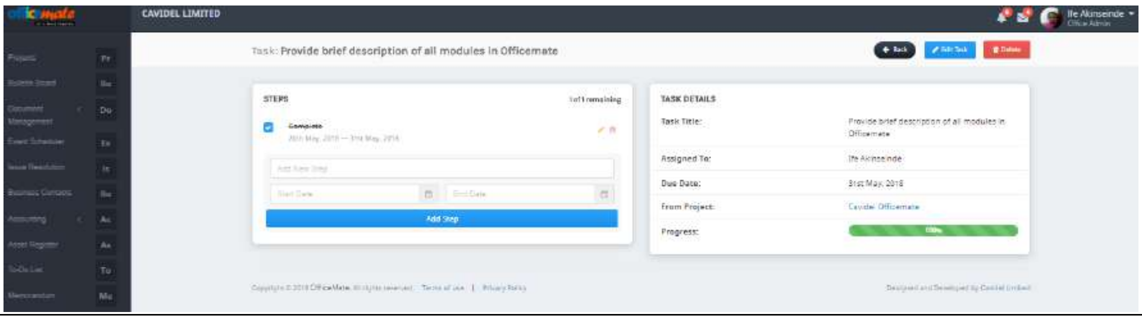
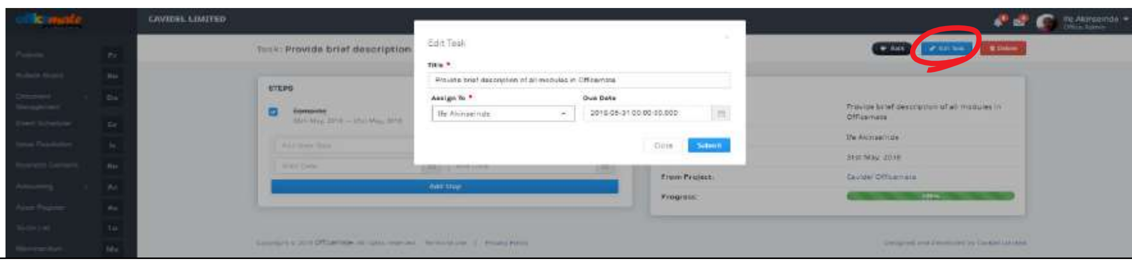
F. Module: Projects

Step	Procedure
1	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. **Admin View:** By default the admin can see the listing of all the projects that employees are engaged in. **Go to:** Projects
	
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

<table>
<tr><td></td><td>
</td></tr>
<tr><td>3</td><td>Employee View: Employees can see the listing of all projects that have been assigned to them and the corresponding progress level.
Go to: Projects</td></tr>
<tr><td></td><td>
</td></tr>
<tr><td>4</td><td>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.</td></tr>
</table>

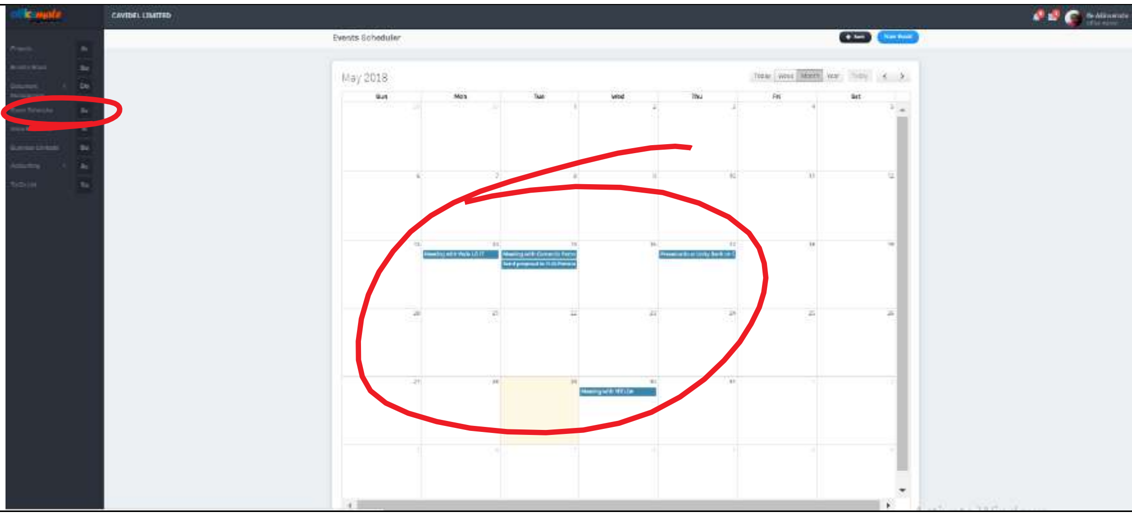
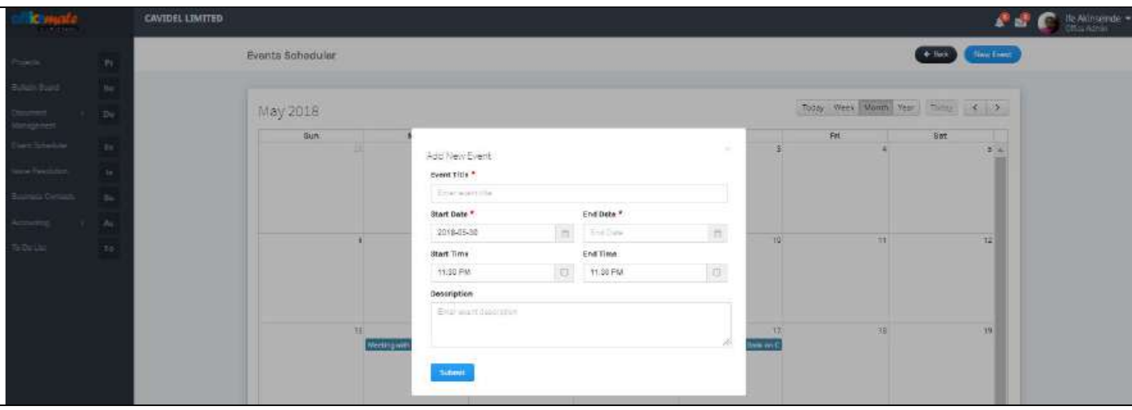
	 
5	**Gantt Chart:** This is a visual view of tasks scheduled over time in a project. They are used for planning projects of all sizes and they are a useful way of showing what work is scheduled to be done on a specific day. They also help you view the start and end dates of a project in one simple view.
	

6	**Viewing Project Task Assigned to you:** **Go to:** Assignees>>Click on your name to view the project task assigned to you.
	
7	**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. **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"
	
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.
	

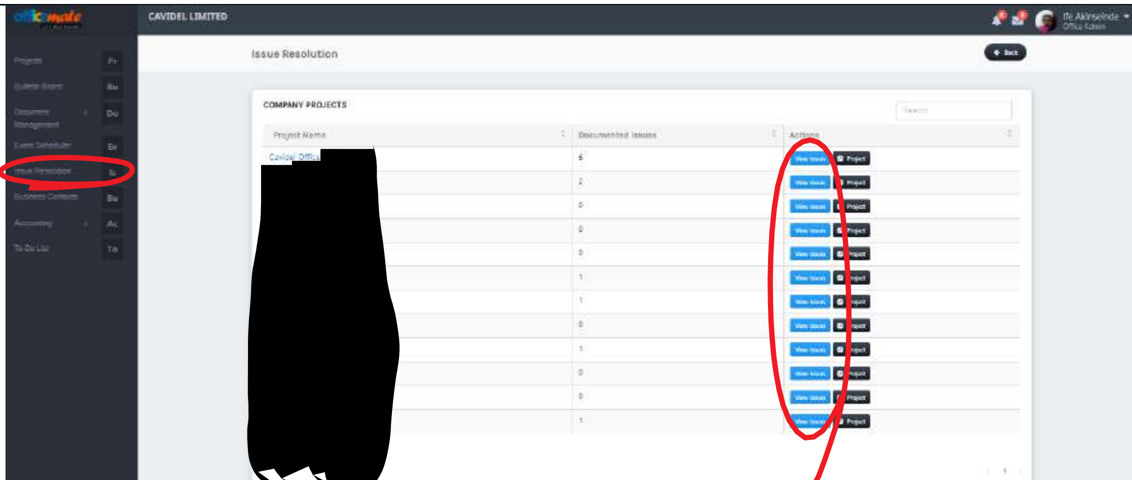
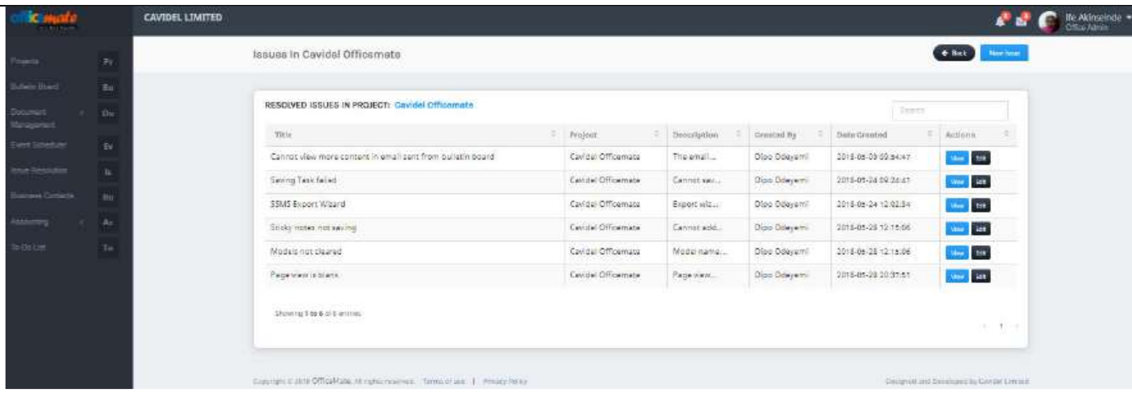
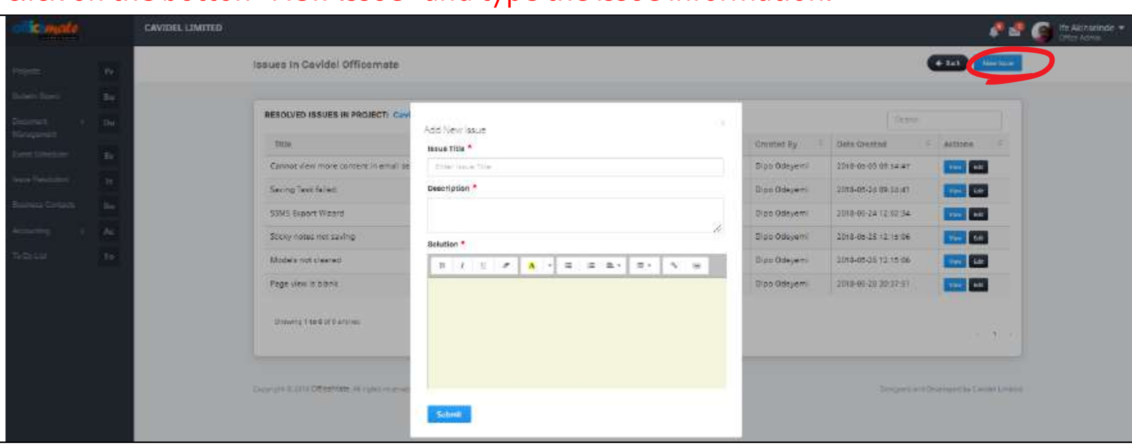
G. Module: Event Scheduler

Step	Procedure
1	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. **Go to:** Event Scheduler>>

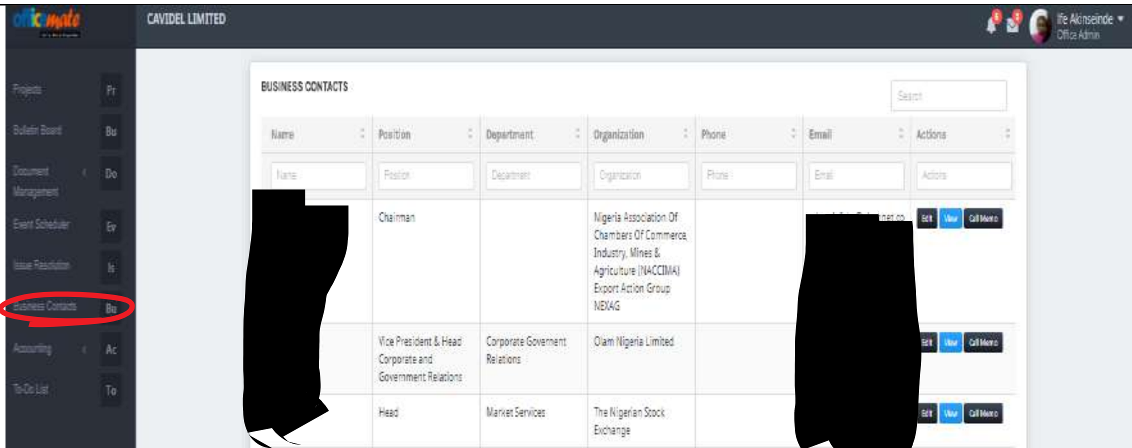
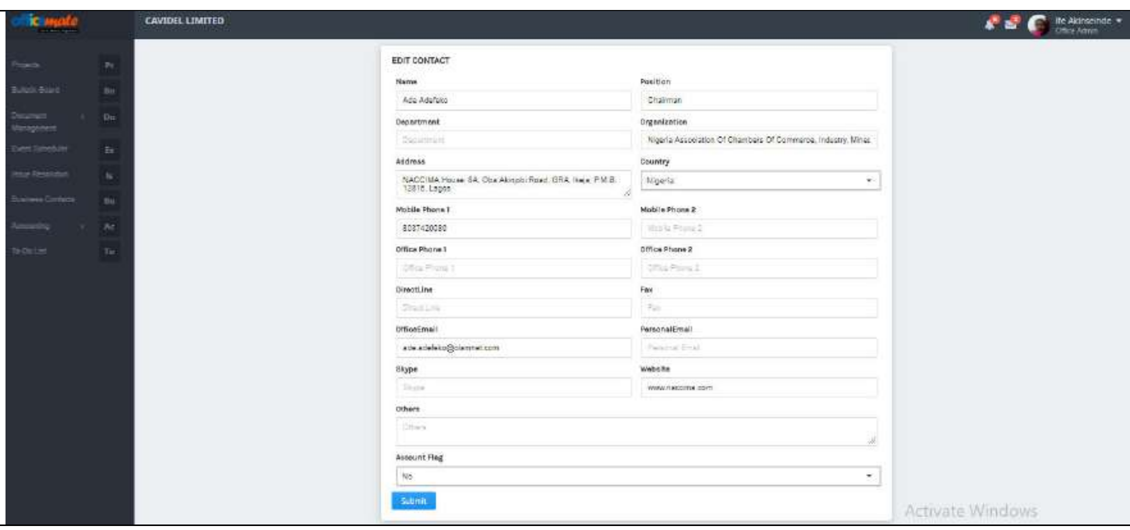
	
2	**New Event:** Admin and employees can add events, tasks and actions to take place in the future. **Go to:** Event Scheduler>>Click on New Event
	

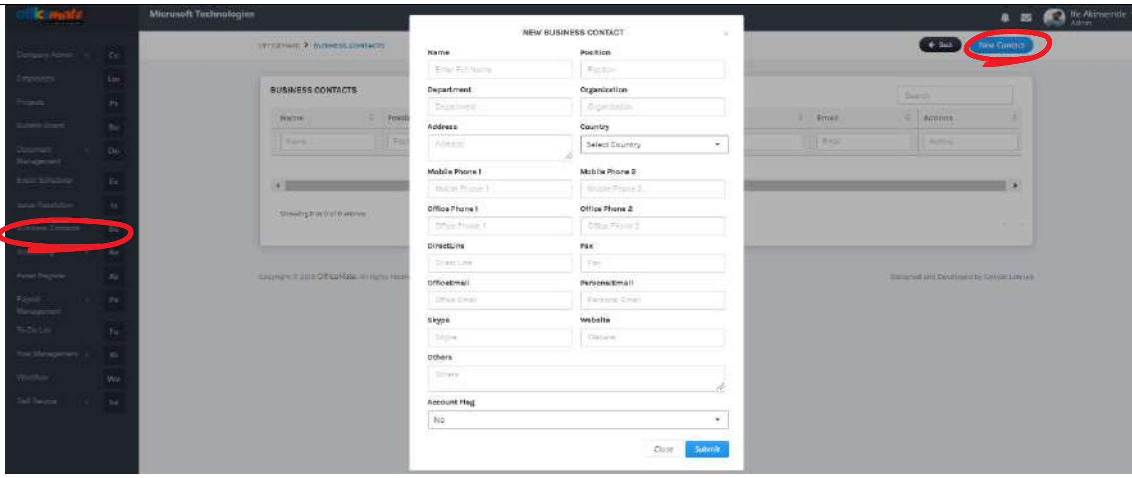
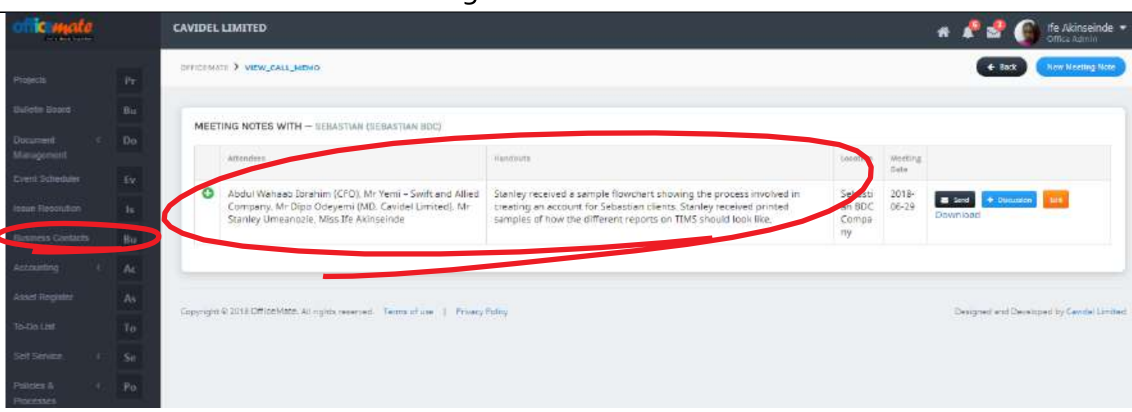
H. Module: Issue Resolution

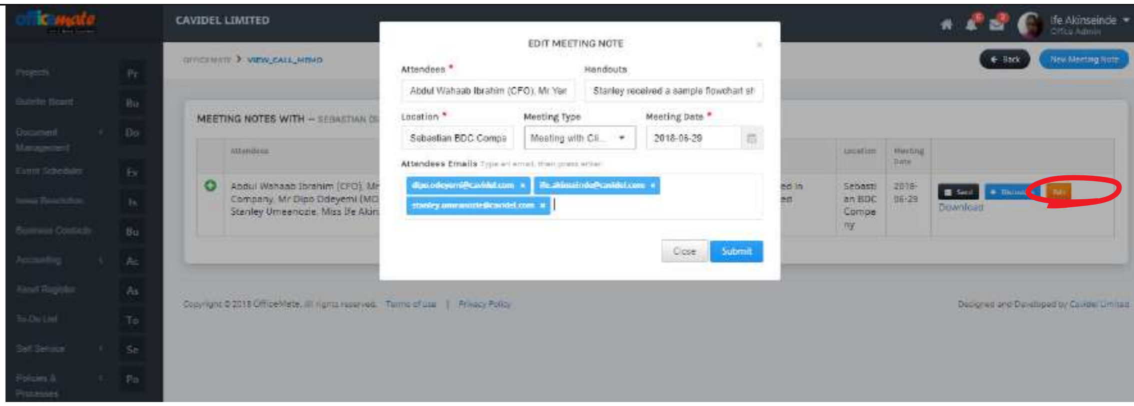
Step	Procedure
1	**Issue Resolution:** This is a project issue management tool that is used for identifying, reporting and communicating what is happening in a project. Also, it is used for capturing issues resolution and serves as a knowledge base for the institution. **Go to:** Issue Resolution It displays the listing of all the company projects and their documented issues and solutions.

<table>
<tr><td></td><td>
</td></tr>
<tr><td>2</td><td>Issues View: It displays the issues that have been logged for a particular project and gives option to edit to make changes if needed.
Go to: Issue Resolution>> Click on the project title>>Issues View>>Edit</td></tr>
<tr><td></td><td>
</td></tr>
<tr><td>3</td><td>Documenting Issues (Issue Log):
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.</td></tr>
<tr><td></td><td>
</td></tr>
</table>

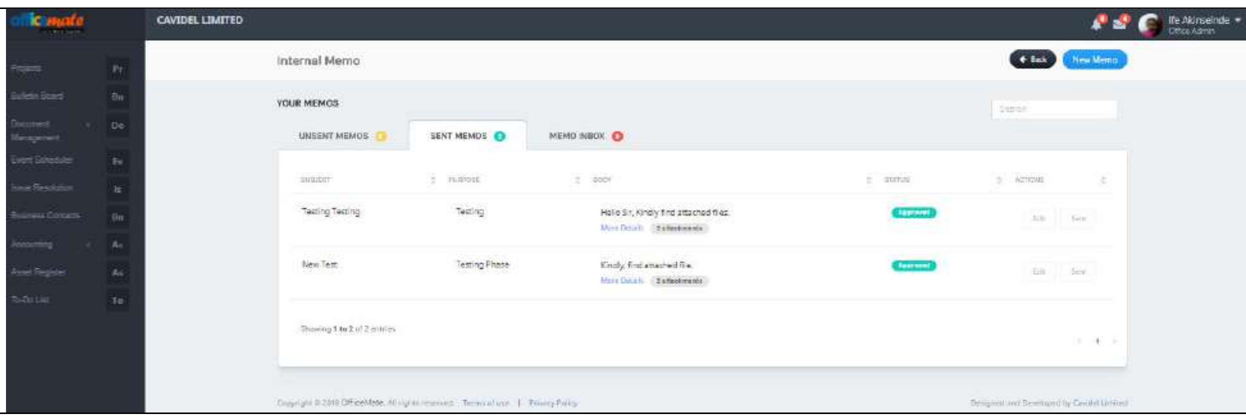
I. Module: Business Contacts

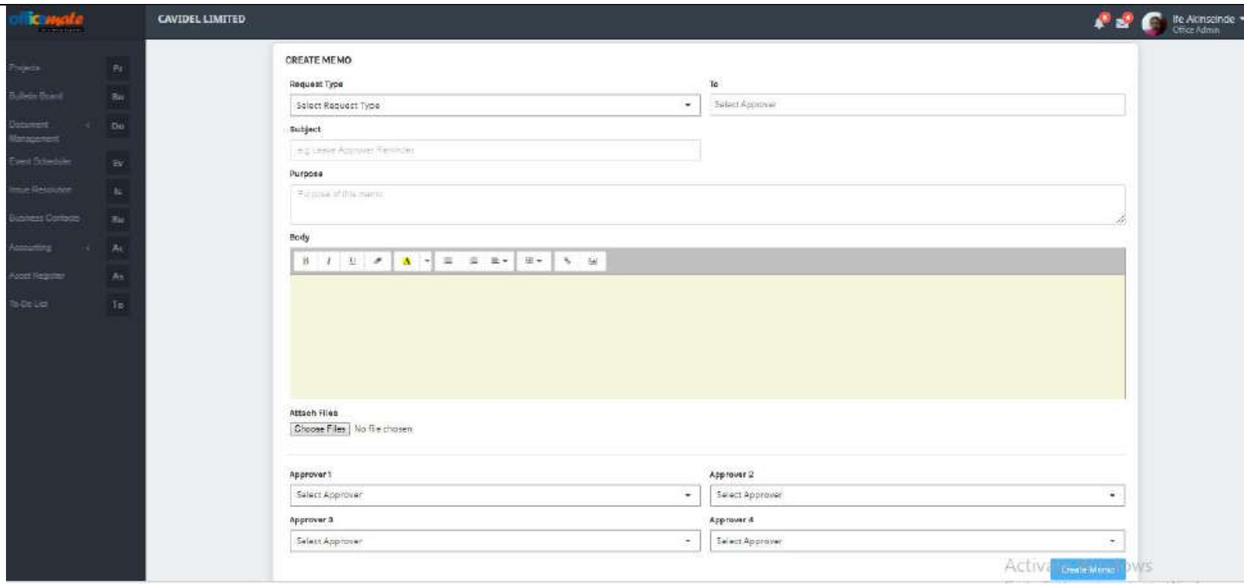
<table>
<tr><th>Step</th><th>Procedure</th></tr>
<tr><td>1</td><td>Business Contacts: This is a business contact manager tool that is used to organize and store information about the people you do business with.
It displays the listing of all current and potential clients.
Note: Restrictions apply here. Only assigned staff are given access to view available contact list.
Go to: Business Contacts</td></tr>
<tr><td></td><td>
</td></tr>
<tr><td>2</td><td>Edit and View: It enables you to view and modify or change the contact information inputted
Note: Restrictions apply here. Only assigned staff are given access to edit available contact list.
To Edit: Go to: Business Contact>> Click on Edit>>Change the information you want and click submit.
To View: Go to: Business Contact>>Click on View</td></tr>
<tr><td></td><td>
</td></tr>
</table>

3	**New Business Contact:** **Note:** There are no restrictions to adding a 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 discusions 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. Empoyees can view and create meeting note to be sent to business contact available in a meeting. **Go to:** Business Contacts>>Meeting notes
	
5	**Edit Business Note:** **Go to:** Business contacts>>Meeting notes>>Edit

J. Module: Self Service – Internal Memo

Step	Procedure
1	**Internal Memo:** A note written to one's supervisor requesting for approvals. It is used for internal communication in the company. **Go to:** Self Service>>Memos
	
2	**New memo:** Creating a new memo Select the approval levels- supervisors or managers required to approve requests. Can attach multiple files if needed. The sender's name should be inputted in the "To" box. The "Approval 1" box should have the name of the recipient (e.g. supervisor) of the memo. **Go to:** Click on New memos



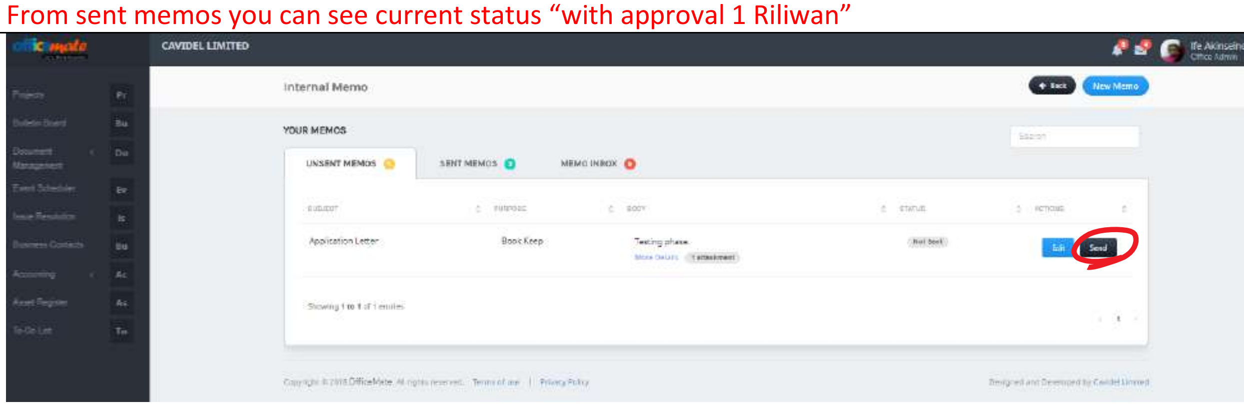
3 **Memo view:** Newly created memos

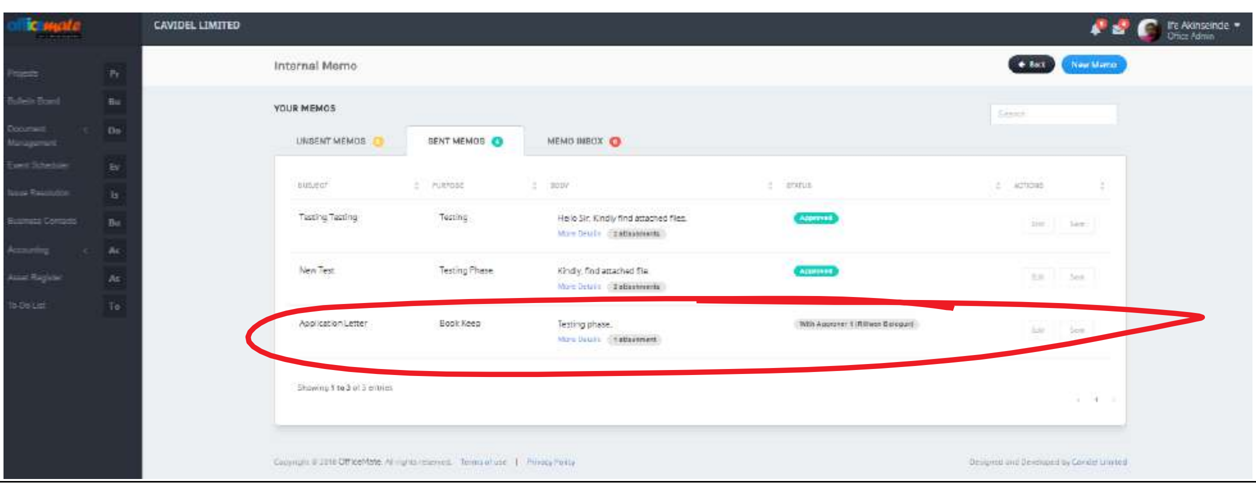
Go to: Click on My Memos to view created memo in the "Unsent Memos".

Current status should show "not sent"

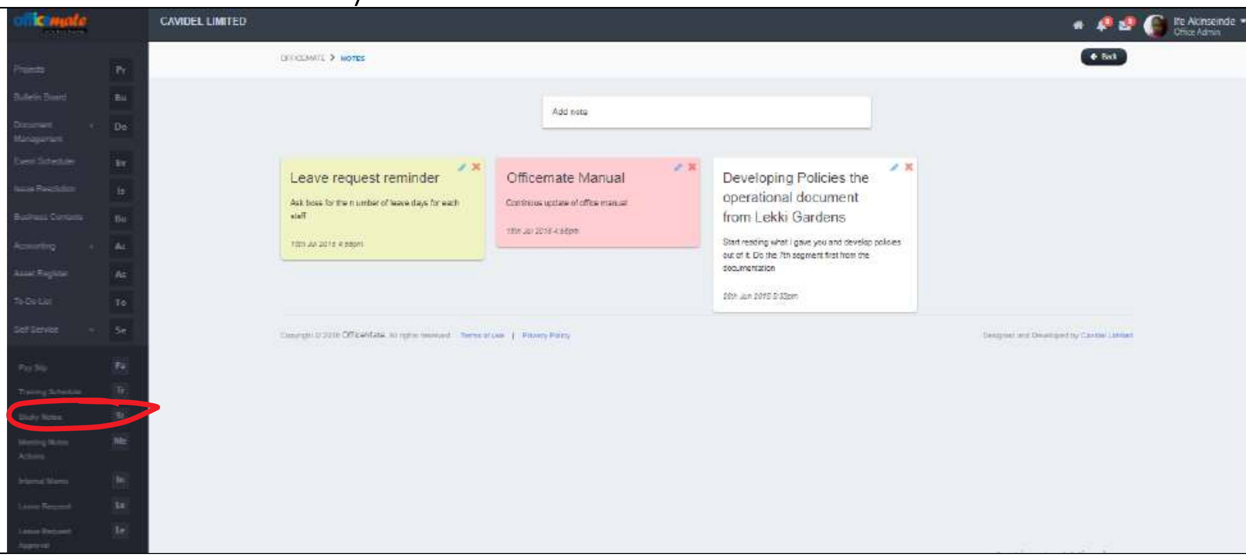
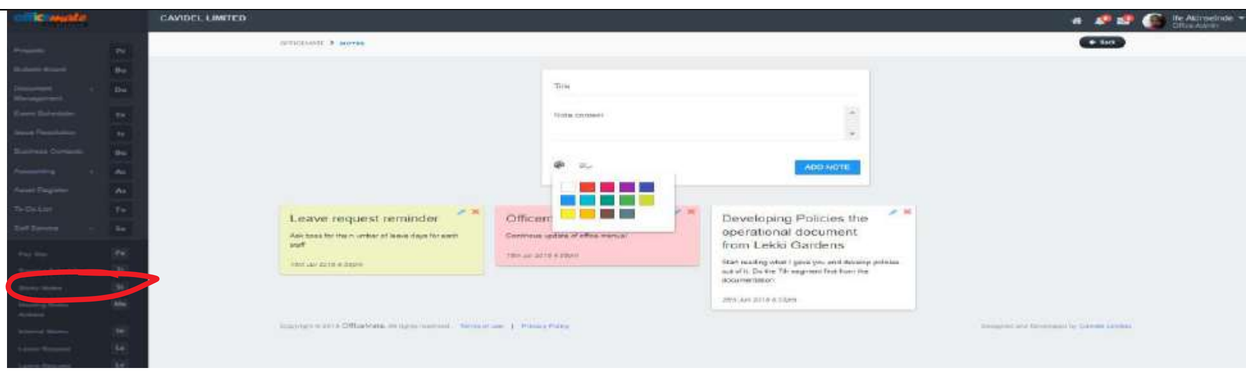
Untill you click "Send" from the "Unsent Memos" to completely send created memos before status can be changed.

From sent memos you can see current status "with approval 1 Riliwan"



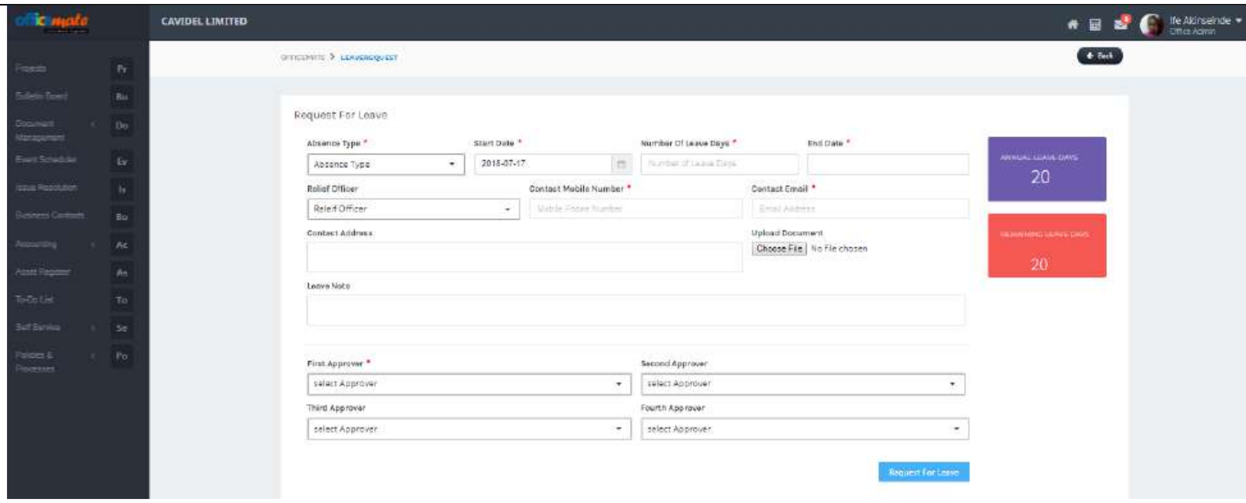
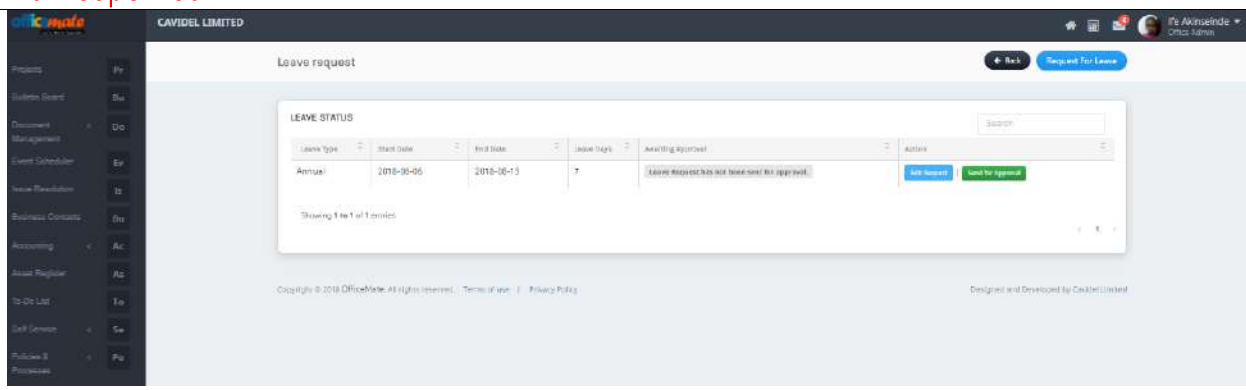


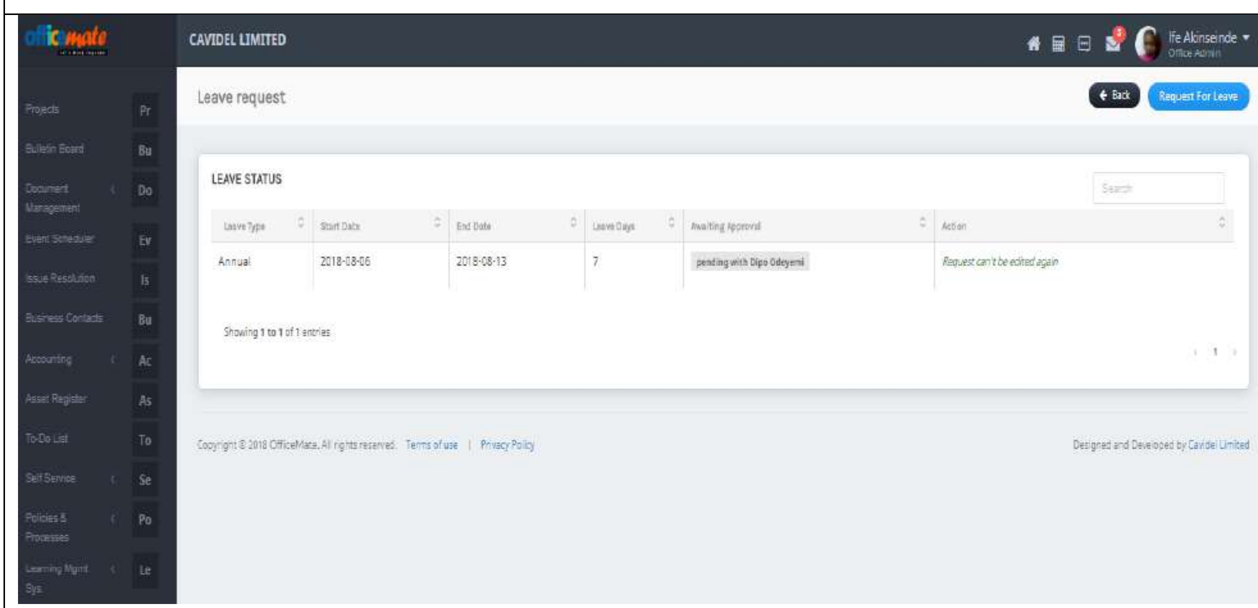
K. Module: Self Service – Sticky Notes

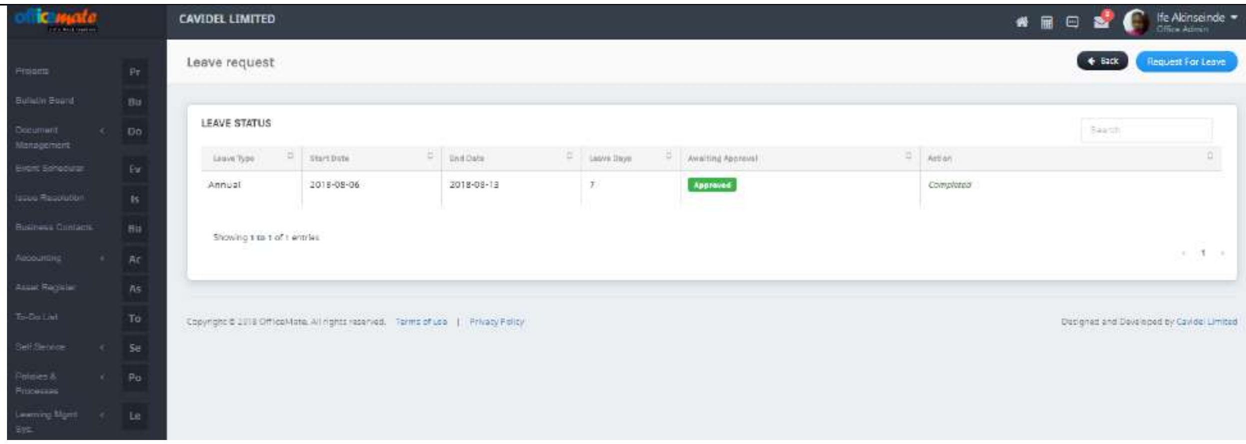
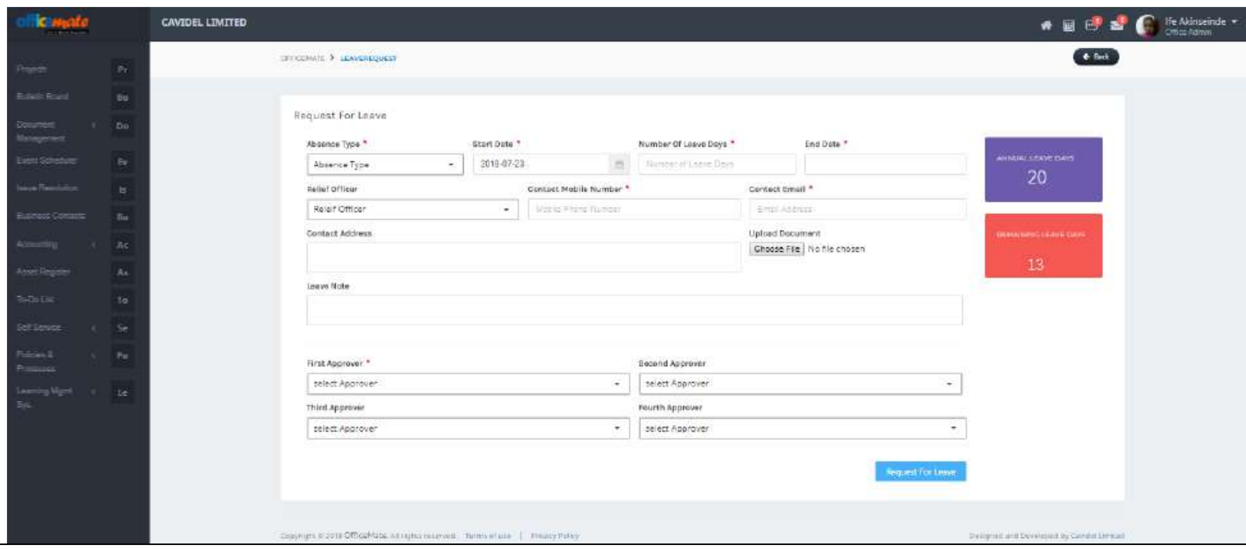
Step	Procedure
1	This module can be used to create different types of notes that remain visible on the desktop screen. It enables you to plaster the electronic equivalent of good old-fashioned **Post-It notes.** **Go to:** Self Service>>Sticky Notes
Fig 7	
2	**Add Sticky Note:** Click on "Add Note"
	

L. Module: Self Service – Leave Module

Step	Procedure
1	This module is a highly flexible leave management software module. The Leave Management module to process employee leave requests with ease. Staff can see the number of leave days assigned to them yearly. **Go to:** Self Service>>Leave Request

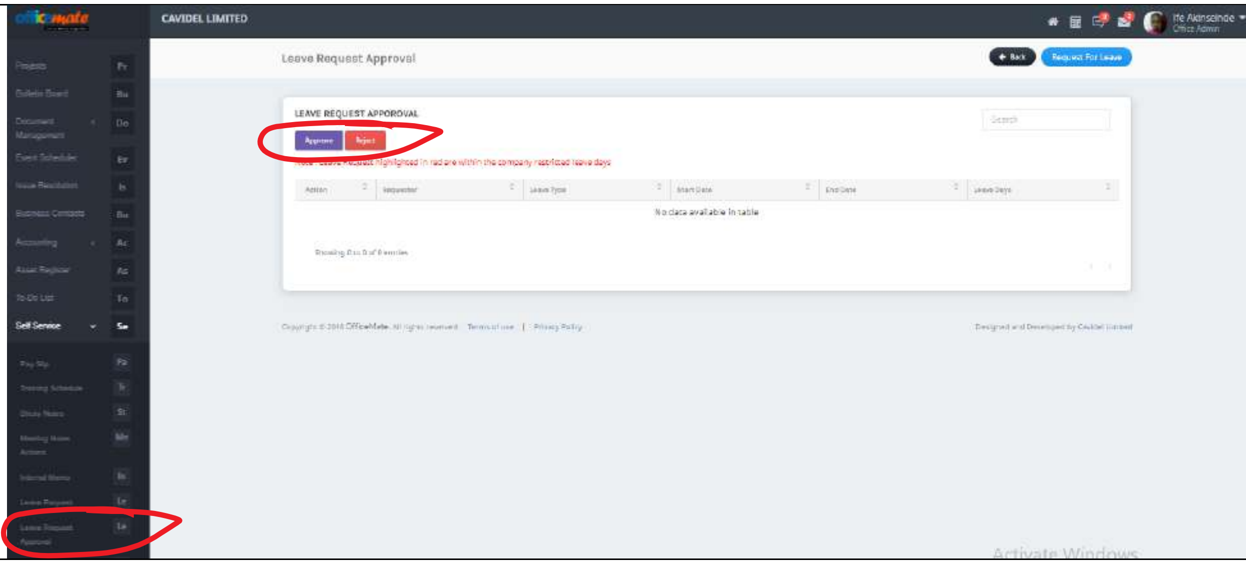
<table>
<tr><td></td><td>
</td></tr>
<tr><td>2</td><td>Click on the "send for approval" to completely submit leave application and await approval from supervisor.</td></tr>
<tr><td>Fig 7</td><td>


</td></tr>
<tr><td>3</td><td>This view displays the employee leave request approved by the supervisor.</td></tr>
</table>

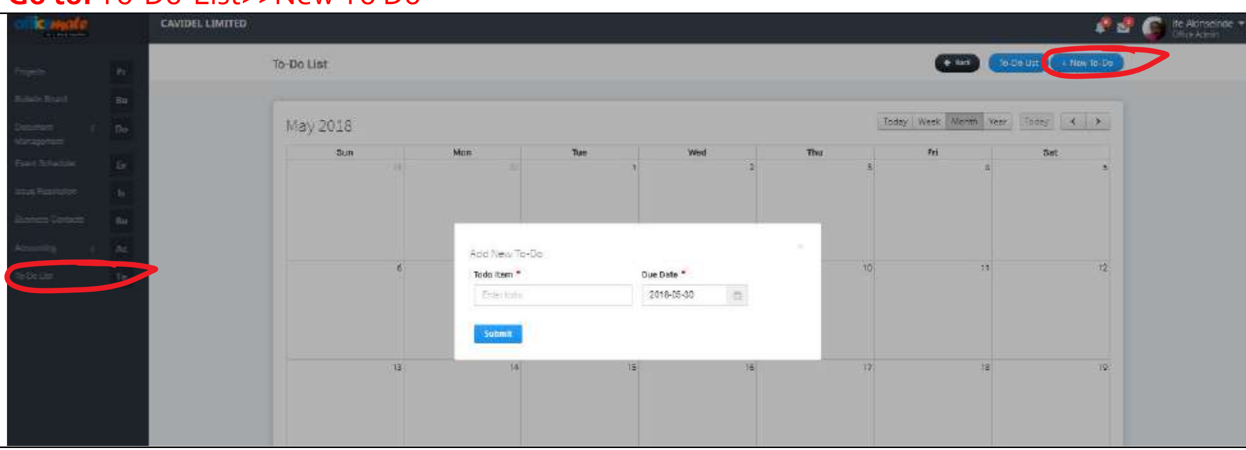
	
4	Once the request has been approved, employee can view the remaining leave days available for them on their leave request module.
	

M. Module: Self-Service – Leave Request Approval

Step	Procedure
1	This module gives you access to see leave request that has been assigned to individual staff to approve or reject. **Go to:** Self Service>>Leave Request Approval

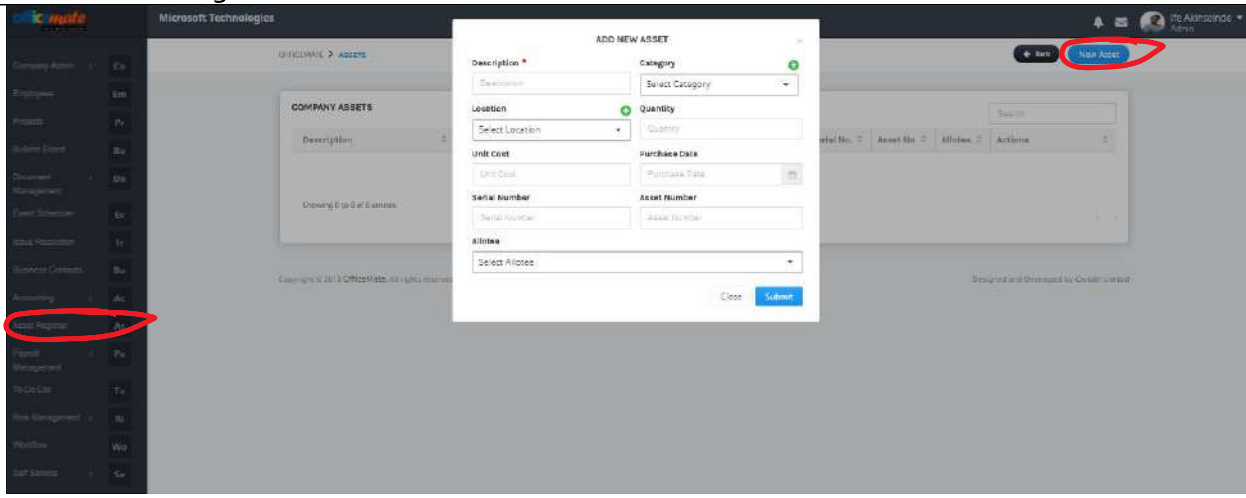
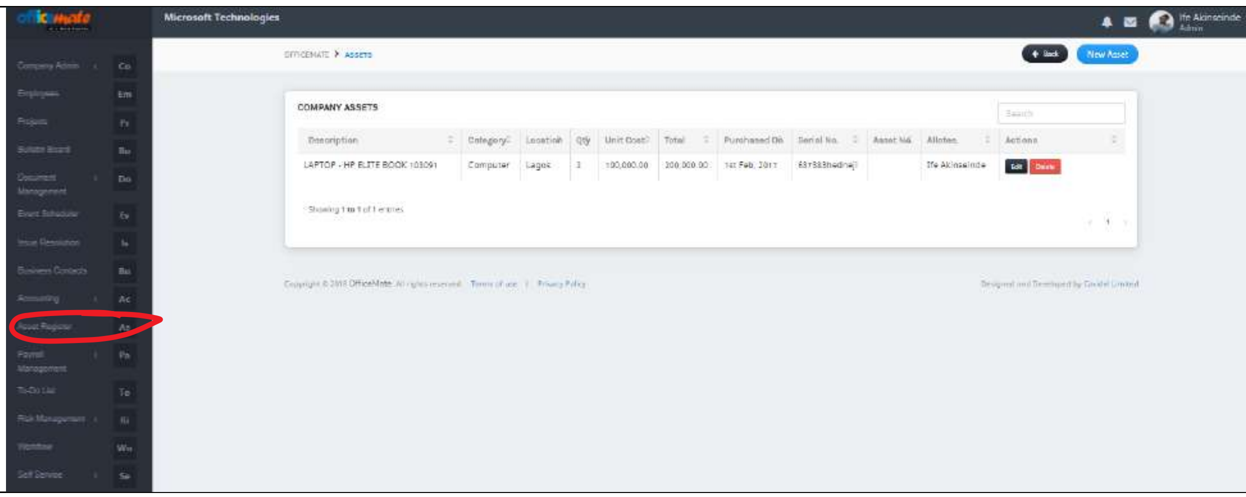
	

N. Module: To-Do-List

Step	Procedure
1	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. **Add New To Do:** Employees can add their personal activities/task or <u>set reminders</u> and view to do items. Employees can view available to-dos. **Go to:** To-Do-List>>New To Do
Fig 7	

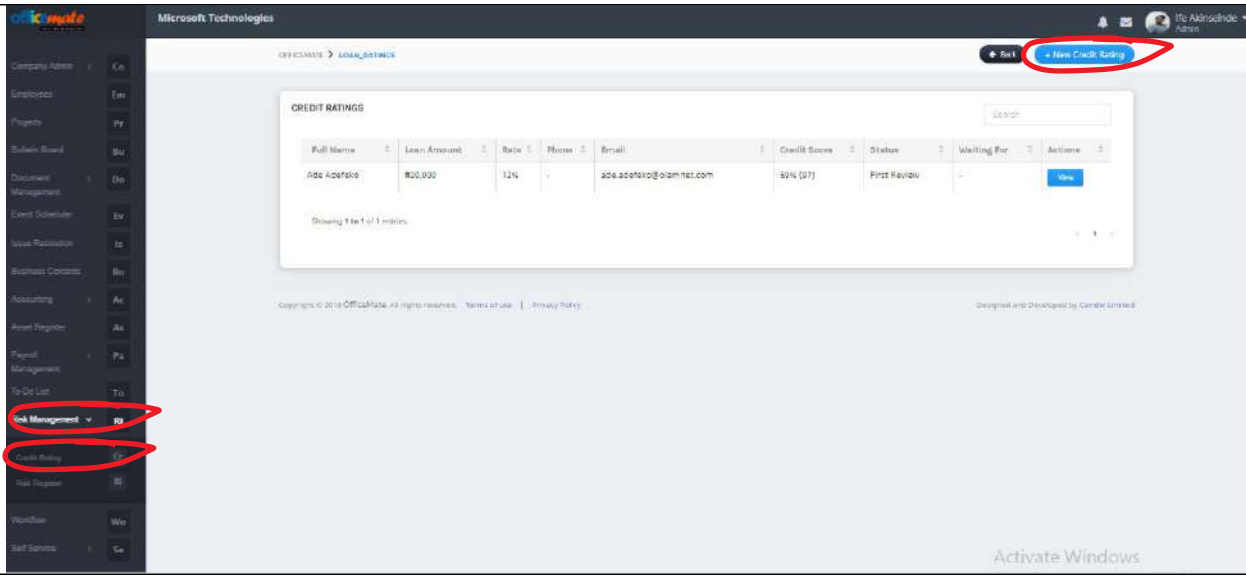
O. Module: Asset Register

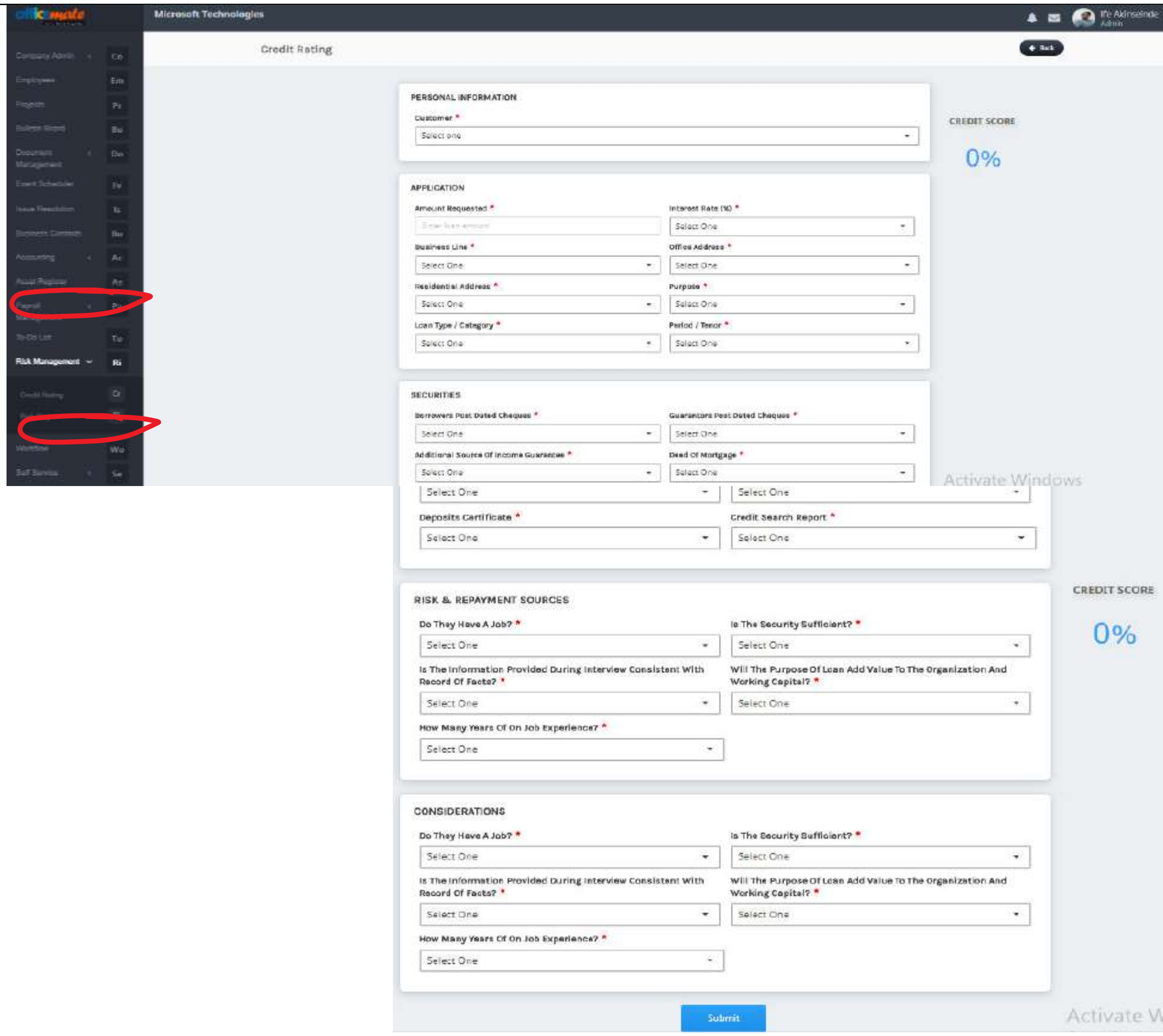
Step	Procedure
1	An asset register is a list of the assets owned by a business. **New Asset:** Admin can add all company assets.

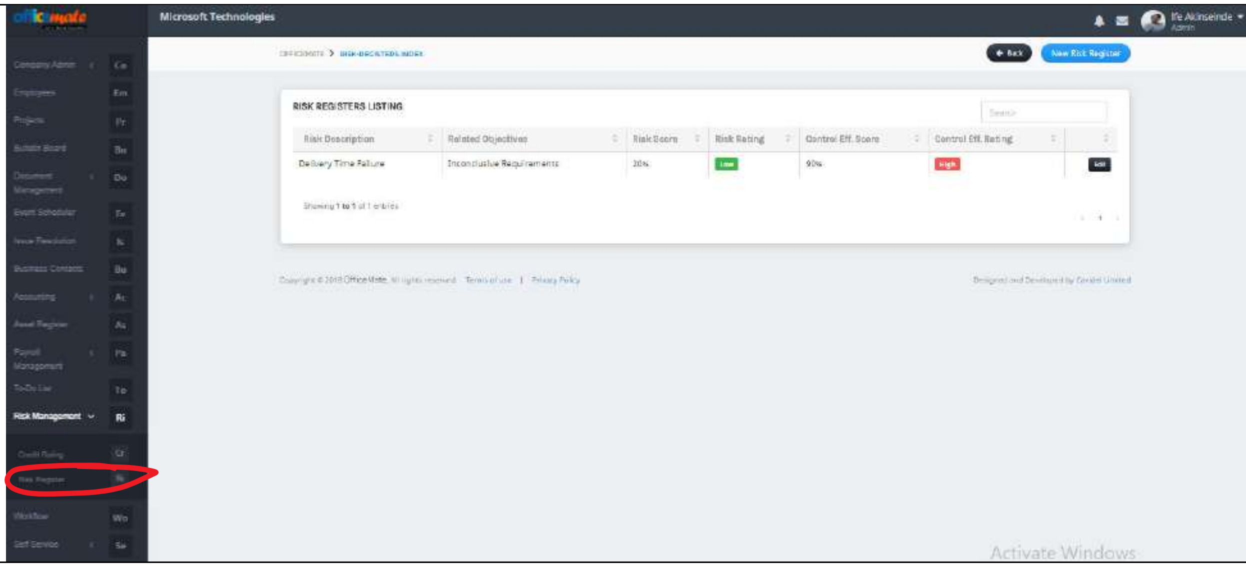
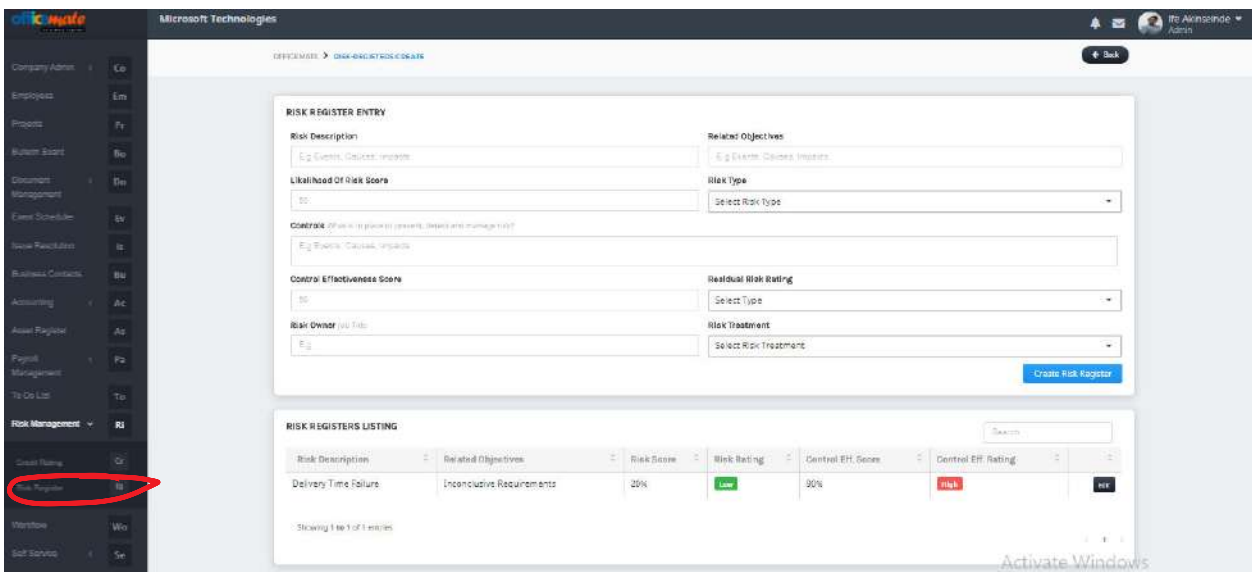
	Go to: Asset Register>>New Asset
Fig 7	 2
	Asset List: It displays pertinent details about each available fixed asset to track their value and physical location. Risk Management: This module is used to track and manage the different level of risk.
	

P. Module: Risk Management

Step	Procedure
1	**Risk Management:** This module is used to track and manage the different level of risk. **Credit Rating:** It is used to determine the risk rating of an employee. **Go to:** Risk Management>>Risk Rating

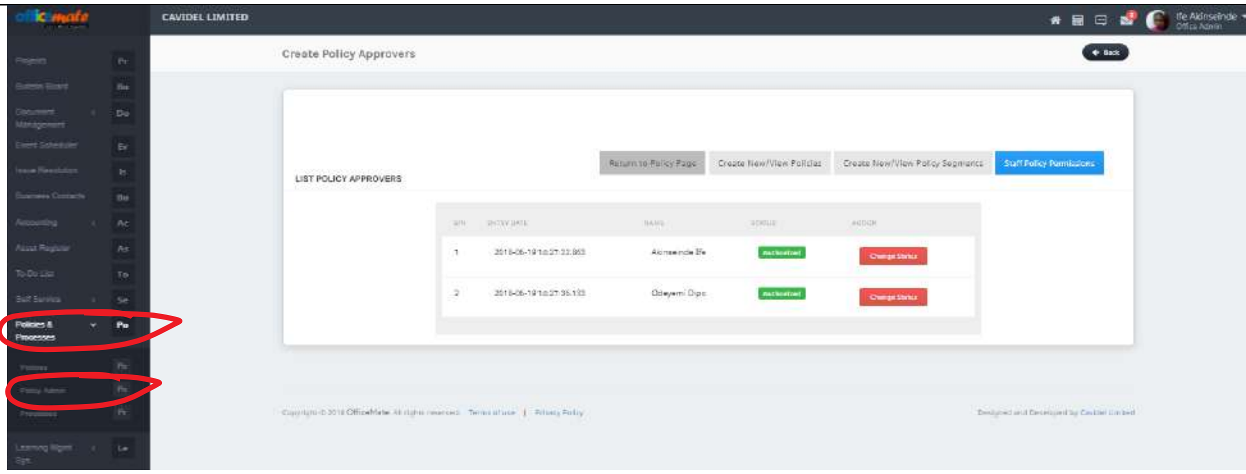
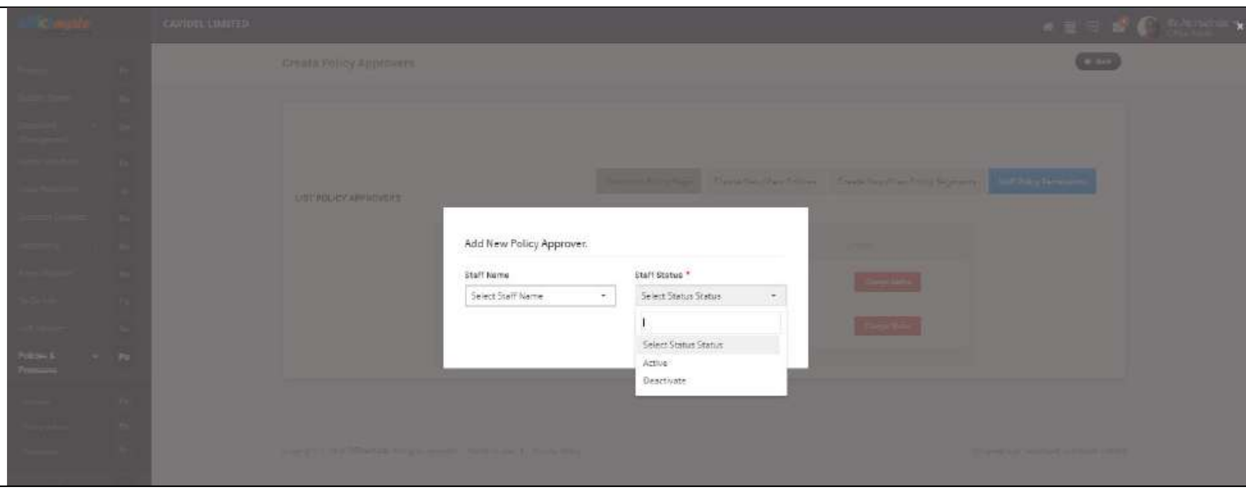
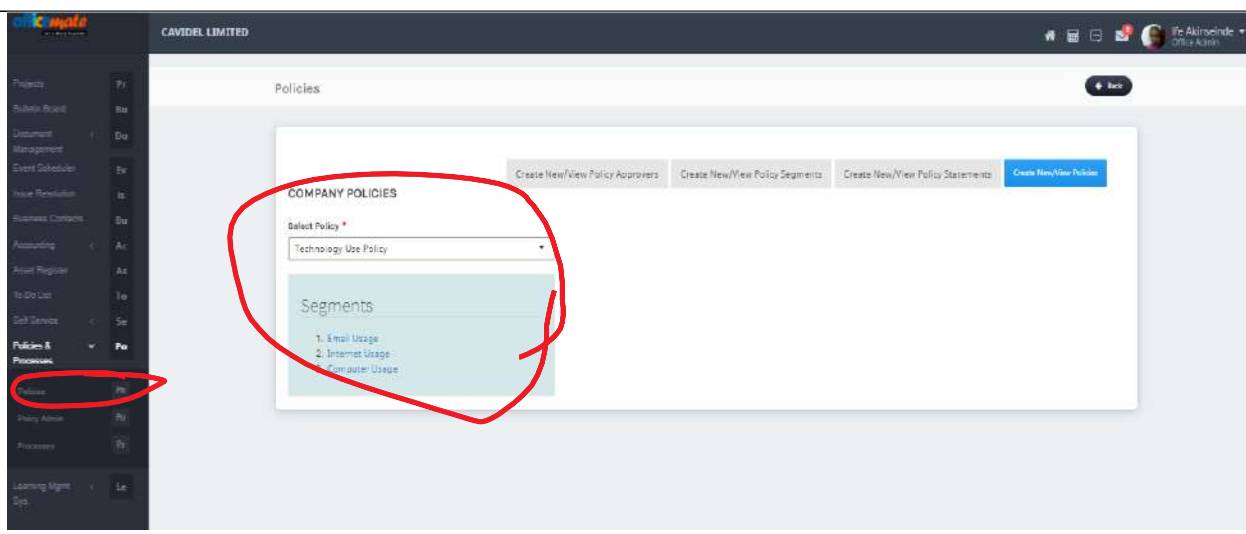
<table>
<tr><td>Fig 7</td><td>
</td></tr>
<tr><td>2</td><td>New Rating:
Click on New Risk Rating</td></tr>
</table>

<table>
<tr><td></td><td>
</td></tr>
<tr><td>3</td><td>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.
Go to: Risk Management>>Risk Register>>New Risk Register</td></tr>
</table>

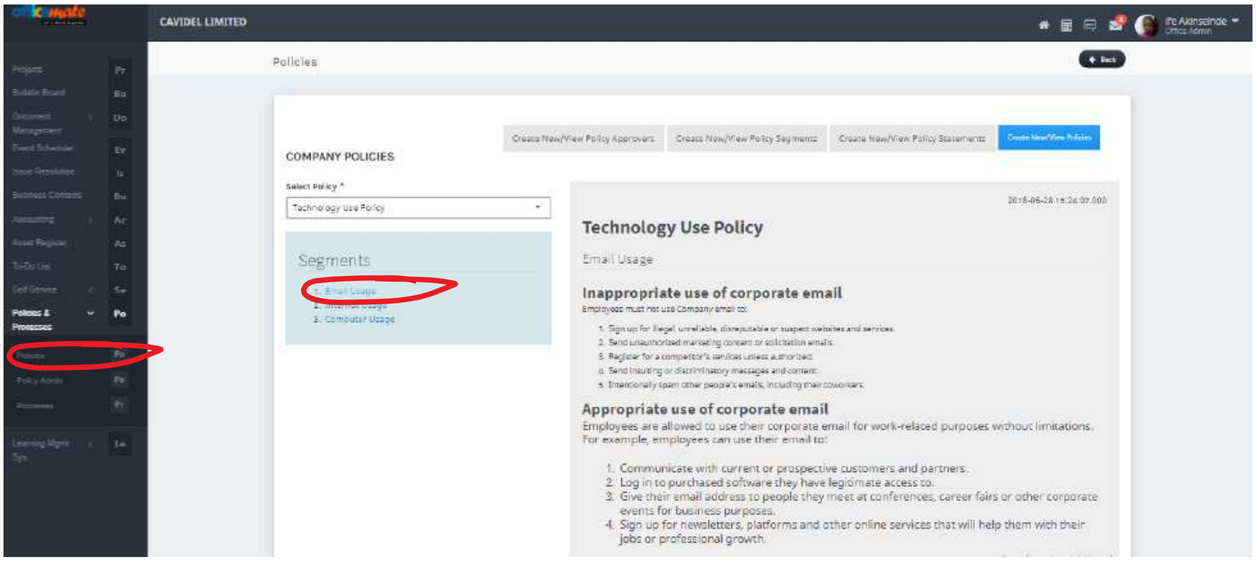
	
4	**New Risk Register:** After creating a new risk entry, the system automatically returns a report stating the risk level of the entry (high, low or medium).
	

Q. Module: Policies & Processes

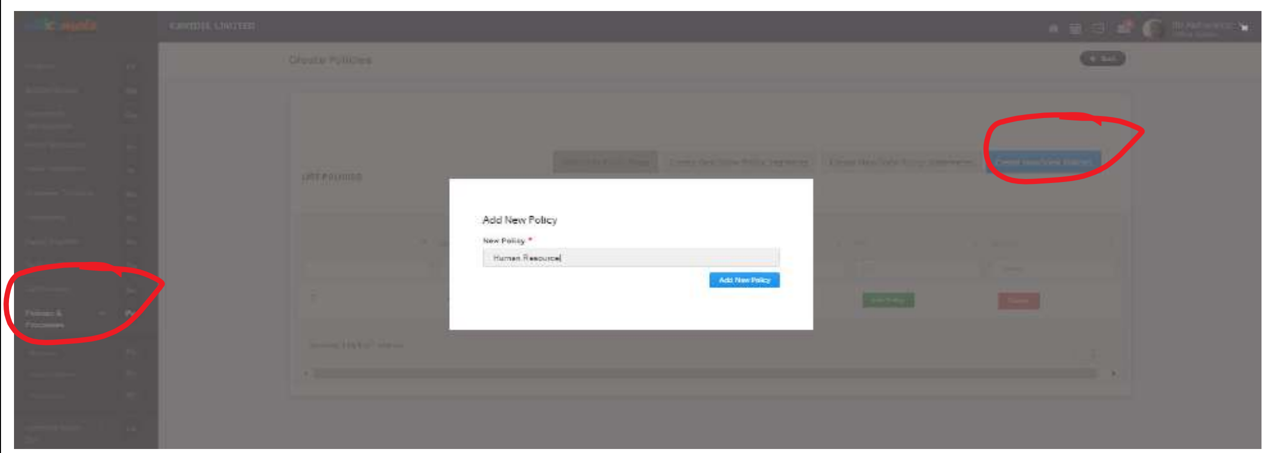
Step	Procedure
1	This module gives you access view and create policies and procedures that determine the operations of the company or business. Here, staff can view the list of policy approvers **Go to:** Policies & Processes>>Policy Admin

<table>
<tr><td></td><td>
</td></tr>
<tr><td>2</td><td>Setting Policy Permissions: Staff can be granted different access based on their roles.
Goto: Policies & Processes>>Policy Admin>>click on ‘Staff Policy Permission’</td></tr>
<tr><td></td><td>
</td></tr>
<tr><td>3.</td><td>View Policies: To view company policies that have already been created.
Goto: Policies & Processes>>Policies>>Click on ‘Select Policy’</td></tr>
<tr><td></td><td>
</td></tr>
</table>

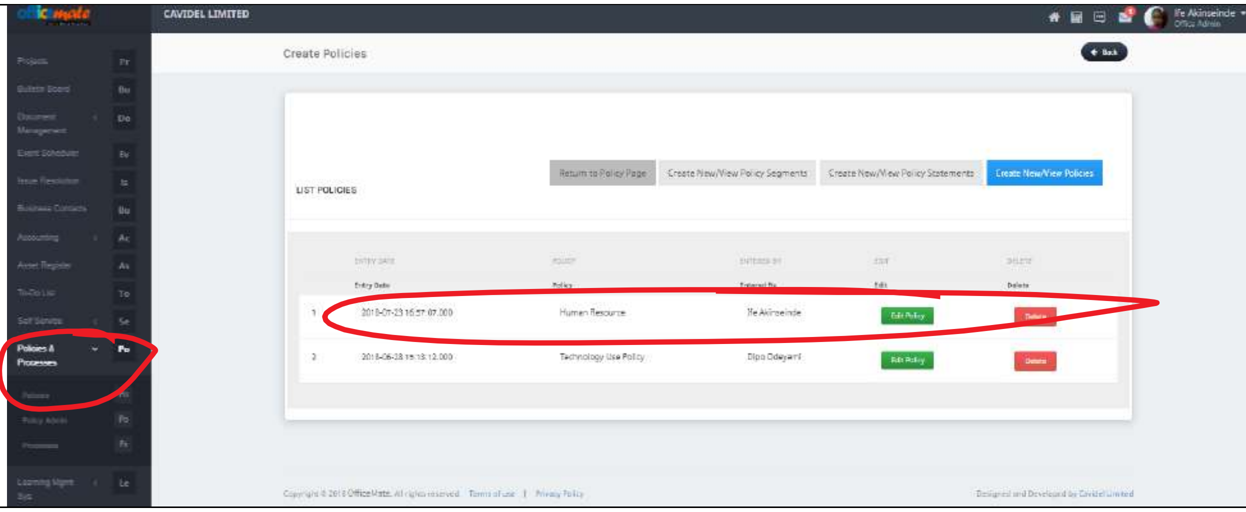
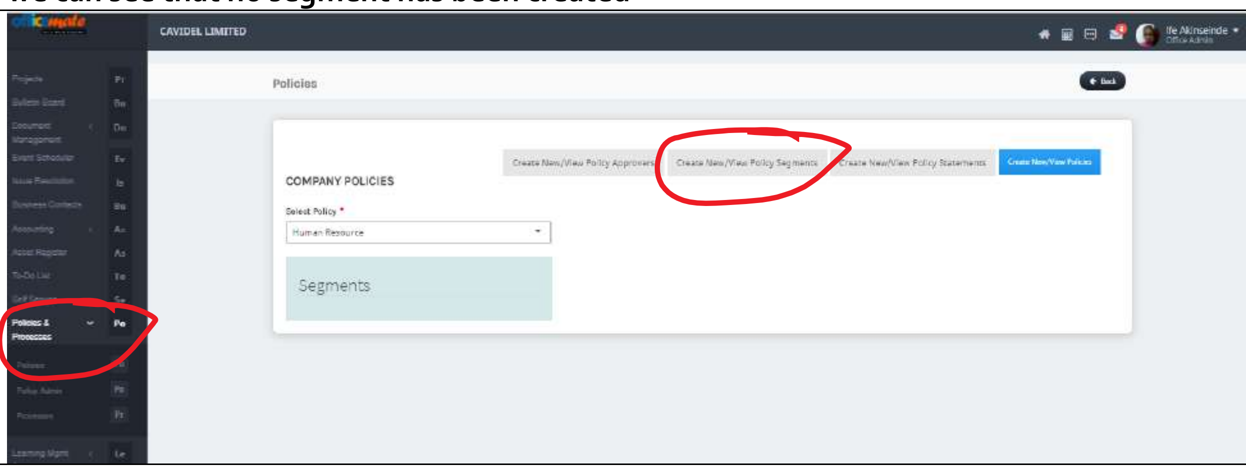
<table>
<tr><td>4.</td><td>Policies & Segments: Staff can vew and read policies created based on their different segments.
Goto: Policies & Processes>>Policies>>click on the drop down of policies >> Click on the segments.</td></tr>
<tr><td></td><td>

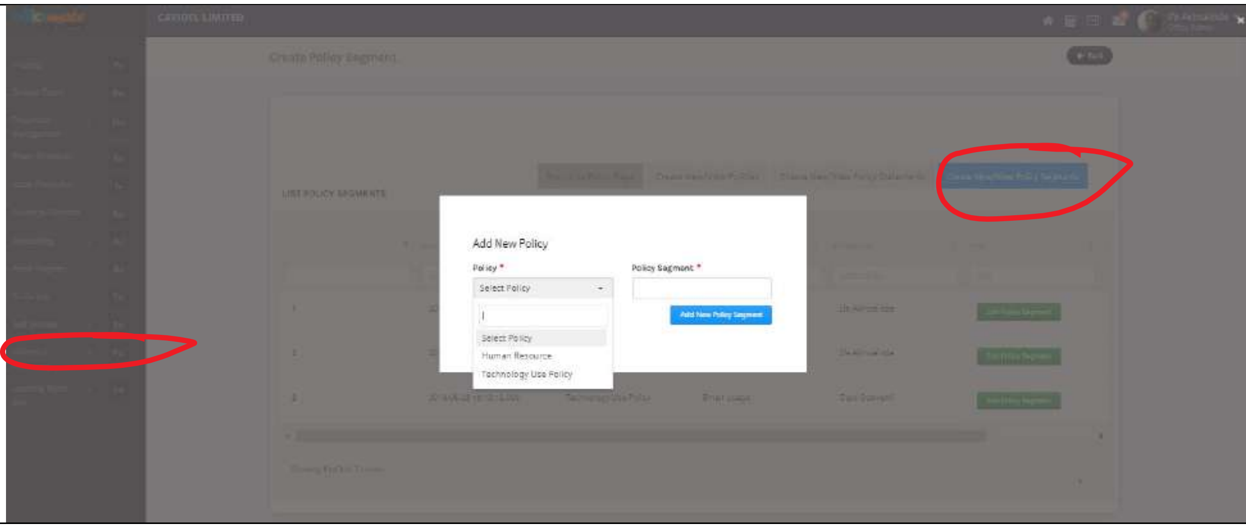


</td></tr>
<tr><td>5</td><td>New Policies: Creating new company policies.
Goto: Policies & Processes>>Policies>>click on ‘Create New/View Policies’>>type the name of the new policy and click enter.</td></tr>
<tr><td></td><td>



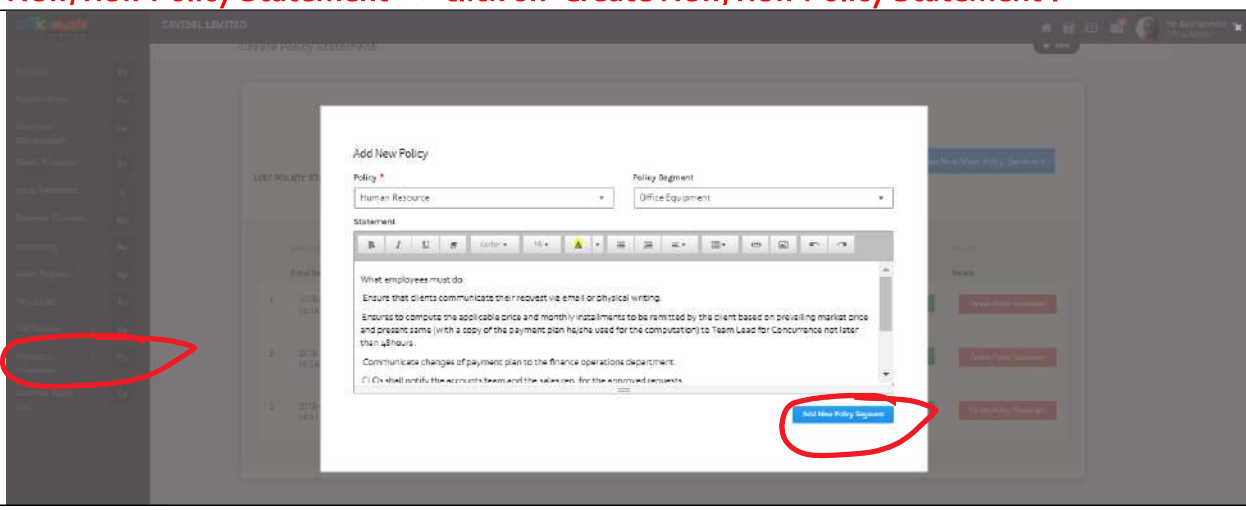
</td></tr>
<tr><td>6</td><td>New Policy created: This displays the new policy created.</td></tr>
</table>

	
7	**Policy Segment:** **Goto: Policies & Processes>>Policies>>click on 'Create New/View Policies'>>click on the name of the policy>>click on 'Create New/iew Policy Segment'.** **Note: This page displays the all the policy segment created. For this new policy created, we can see that no segment has been created**
	
8	**New Policy Segment:** **Goto: Policies & Processes>>Policies>>click on 'Create New/View Policies'>>click on the name of the policy>>click on 'Create New/view Policy Segment' >> click on 'Create New/view Policy Segment'.**

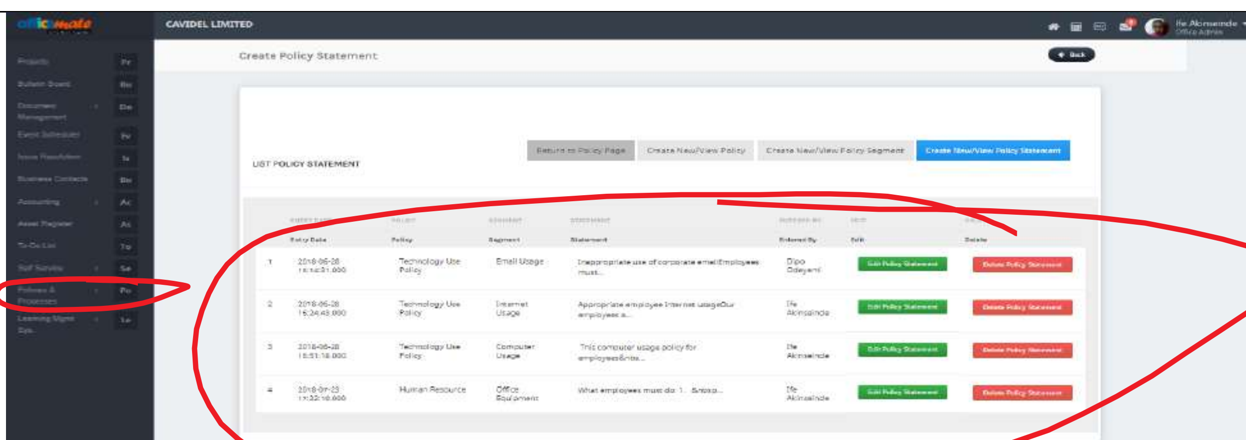


Policy Statement:

click on 'Create New/View Policies'>>click on the name of the policy>>click on 'Create New/view Policy Statement' >> click on 'Create New/view Policy Statement'.



View New Policy Statement created.



R. Learning Management System

Step	Procedure
1	The learning management system (LMS) module is a software application for the administration, documentation, tracking, reporting and delivery of educational courses or training programs. **Course Dashboard: Shows the list of courses required of staff to do.** **Goto: Learning Mgt Sys>>Course Dashboard**