# Setting up Platrum

This article is intended to help you understand how to work with the service and sequentially set up a project for operation. You can always refer to it directly in the project by searching for "Getting Started."

Minimum setup:

- Create the structure of your company's hierarchy

- Define key performance indicators for positions

- Invite employees to the project

- Assign employees to positions

Add regulations and internal documentation:

- Create a folder and category structure

- Configure access permissions

- Populate categories with articles

- Understand the view report

Automate training and knowledge control of regulations:

- Familiarize yourself with the Academy tool

- Add quiz questions to knowledge base articles

- Create training courses for positions

- Assign trainers

- Set up automatic knowledge control

Organize task management:

- Set up task categories

- Create and configure boards for yourself and your team

- Implement weekly planning

Implement expense planning and control process

- Get acquainted with the financial planning tool

- Configure expense categories

- Set up an approval chain for funding requests

- Launch the process of working with requests

Configure financial management, generate reports

- Explore the capabilities of the tool

- Configure transaction types

- Add transactions to the system

- Getting acquainted with reports:

--- VAT (Value Added Tax)

--- Balances

--- P&L (Profit and Loss)

--- Monthly Plan

Automating quality control procedures

- Exploring the tool

- Creating checklists for verification

- Setting up the verification panel

- Studying the report

Organizing storage and management of work passwords

- Getting acquainted with password management tool

Setting up company asset accounting

- Exploring the Warehouse tool and configuring it

# General project settings

This article provides more detailed information about the internal settings of your project, which will help you use our service more conveniently and customize it according to your needs.

## Project settings

These settings are more technical in nature - the name of your project/host/API key, etc. Let's take a closer look at the settings:

### Name

This setting is self-explanatory - here you can give a name to your project (When creating a project, it is assigned a random name, for example: bbd75a0).

This way, you can differentiate between projects (if you have multiple), and in the future, brand your project (Available only on the "Pro" plan). We recommend naming the project the same as your company, for example: Platrum.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003437602/original/3gy-sgoCVGQd6Vw9tRxdPkosF0GAeg8xlw.png?1645703551

The project name will be changed:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003437589/original/xNcMC4afGthkCbdh30BvGINwBaTRZI7nmQ.png?1645703544

### Host

A project host is mandatory. Essentially, it is the name of your project in the URL. The host you specify is inserted into the URL of your project. This makes it easier for users to understand that this link belongs to your project. We recommend using your company name in lowercase Latin letters as the host, for example: softstroi. This way, the link to your project will look like this:

https://softstroi.platrum.ru (https://softstroi.platrum.ru/)

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003437588/original/\_L9dYJIb8Gz3\_MXSWOdvXBYnlQGjmc3VAQ.png?1645703541

### Transferring to another owner

You can transfer the project to another owner. To do this, you need the future project owner to be added to it and billed.

To transfer the project, go to "Settings" and select the "Project" section. Enter the email address of the future owner in the "User Email" field and confirm the project transfer with a checkmark.

After that, click on "Transfer Ownership":

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73033760630/original/P6Rq1i\_j7v0S8wF6jNmwFhpIJOOEt8YUdw.png?1669902460

Next, you need to enter the name of your project, which you can find on the same page above, and click on "Transfer Project". Project transfer is only available to its owner.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73033761015/original/253EUS\_U\_HYYAmHkrLDdb1Z1p5gWALFJtQ.png?1669902551

After the project is transferred, you will still have access to it, but you will no longer have certain capabilities that are only available to the project owner.

### IP Access Restriction

This functionality is only available in the "Pro" plan. With it, you can restrict the IP addresses from which users can access your project. This is sometimes necessary for large companies that want their employees to work only from the company's office.

IP addresses should be specified in the following format:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003437605/original/IptEjGZi0MnVIX8lrOJNNCyAY2TPPh9yXw.png?1645703551

81.177.127.34

81.177.127.34

81.177.127.34

Each new IP address should be specified on a new line.

### Project deletion

The name speaks for itself - here you can completely delete your project.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003437611/original/h9zhFv7Q66aSGv\_rLoC3VAVUZSGXMlp3VA.png?1645703552

Do not delete the project until you have made sure that you have transferred all the necessary data from it.

## Profile settings

These settings relate to an individual employee. Here, they can configure how users will see them in the project and also set up their login credentials.

### Profile

Here, users provide information about themselves: Avatar/Name/Phone/Slack/Skype/Telegram/Birthdate/Note (for additional information). You can customize profile fields in a separate section. This settings block is located in the Settings → Profile section.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73034203616/original/iQmVupZoaNxO44\_liEPoW0zGVIHDUquWEw.png?1670260671

### Account

Here, users specify their email address, which is used for authentication in your project, and the language that is convenient for them to use in the project (the project language is changed only for the individual user).

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73034203905/original/mb6i19nnjUX7xFraZJeiburZNA5RX6W7YA.png?1670260750

### Password change

Here, users can change the password for their project account if needed.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73034204012/original/vYerz4is6NdR1So0ifeE8l-kiFdN1Iil6w.png?1670260791

## Profile fields

This functionality allows you to customize employee profile fields. For example, you may need employees to indicate their city of residence in their profiles. You can create and configure this field right here:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73034204114/original/g0T77ZbVDpfiBRkcDhTo4e\_8M9lBYMWV6w.png?1670260834

To add a field, you need to click on the corresponding button in the top right corner:

[Click here to see the image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003437615/original/9l5l2PAu2JaXbF-ig5\_HMflz450qg8uYsQ.png?1645703553)

Here you can configure:

- Field name (e.g., "City")

- Field type ("Text", "Dropdown", "Number", etc.)

- Additional settings:

- "Sort order" (specifies the position of the field in the list)

- "System name" (used to prevent duplication of fields with the same name)

[Click here to see the image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003437596/original/\_xlMmZTVauOPRJbHGUmvZDiR4-136lDyuQ.png?1645703551)

These field data are displayed in the employee card in the list of employees:

[Click here to see the image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003437610/original/\_Eu0nLUPQ6HJfGaaAOEk5Cf9a8FzjDFWDQ.jpeg?1645703552)

They are also shown in the internal profile settings:

[Click here to see the image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003437609/original/sCXgz-6Vb-T5pnkgU-k-xnyAuL-7jRPoHg.png?1645703552)

You can make a field hidden, meaning it will be invisible to users who do not have the corresponding access to view it, and only accessible to those users and the employee who filled it:

[Click here to see the image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003437613/original/Zt8A2GISwS3NIYPzHyS8nWcT9jfnUMeZWQ.png?1645703553)

## Accesses

Here you can conveniently manage all the access rights in the project. Access rights are granted separately to each employee.

[Click here to see the image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003437612/original/D6tVKjmjQyBKgizLk\_uwL\_bPA1vLuSgqgA.png?1645703552)

To find this section, go to the project settings and navigate to the "Accesses" section:

[Click here to see the image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73034204826/original/mg5ejjelyb34ppL4dqztN8gyRTYA7MLp6g.png?1670261075)

When opening a user, their access settings are displayed:

[Click here to see the image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003437614/original/Vzk9cmGpNwl\_jaVmTv5nZSSz4rt2UWQRjA.png?1645703553)

Please grant accesses to employees with caution, as this can affect your project.

## Available Sections

Here you can configure the sections that you want to hide from all users in the left menu:

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003437594/original/C0JVbIwH9HVyFptACnSBeEEG7g08PgK9mg.png?1645703550)

For example, if you don't use Warehouse in your project, you can disable it, and users will no longer see it (However, as an owner, you can enable it again).

## Translations and Terms

This section is intended for configuring translations in your project according to your needs. For example, if your company prefers to use English and you are not satisfied with the translated terms, you can use your own terms to avoid confusion among your employees:

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003437625/original/OHzwZa8hsx-ThgVUuZrdlReERWYtKCrU\_w.png?1645703566)

Enter the desired languages and search for the phrase you want to modify. Note that there may be identical phrases in different sections, so be careful when editing terms.

## White Label

This feature is only available in the "Pro" plan. It allows you to place your project on your own domain, which is convenient for you. Typically, the company name is used for the domain, for example: romashka.ru:

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003437627/original/6\_GwJbU9sjiBSyoq\_ABVpU-bM2ZwmYjLqA.png?1645703567)

You can enter your company's name in the "Company Name" field, and throughout the project, the word "Platrum" will be replaced with the name of your company.

You can also upload your own Favicon, which is usually the logo of your company. This feature will replace the Favicon in the browser tab:

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003437619/original/2R0bAk5tUUwSxA33F6Z\_TJYwCB\_qtHDLSw.png?1645703561)

## Action History

This feature collects all the actions that users perform in your project. With these logs, you can catch an employee engaging in unauthorized actions from their account, and you will have evidence that it was done from their account, as well as the exact time of the action:

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003437631/original/KKYNg-4fpp1tcsC2RPZ7MiVFTndp7QzLWA.jpeg?1645703567)

The action that was performed can be understood from the "Action" column. For example, "user.profile.save" means that new profile data for an employee was saved. In the "Data" column, you can find more information about the action by clicking on the icon on the right:

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003437630/original/FenROnKcXrK4\_DsxYkAt\_Ysn4bb1p-Wt5w.jpeg?1645703567)

# Editing the structure

Important note:

Do not start customizing the project without deleting the demo data first. If you have created your own structure using demo data, make sure to export it before deleting the demo data, so that you don't lose your work. You can export the structure following the instructions provided.

Once you have selected the template that best suits your company, you need to edit it to match your actual structure.

## Basic elements

### Editing mode for the structure

To make changes to the structure, you need to enter a separate mode called editing mode. To do this, click on the pencil icon in the top right corner.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003437922/original/fAEzJo32VkoNw4Ho-lsWBBzLyHH9\_A7ynQ.png?1645703789

This mode is only available to employees with the appropriate "Edit Structure" access.

### Changing the length and width of blocks

The simplest change you can make is to modify the width or height of any block in the structure.

To do this, hover your cursor over the edge of the block, press and hold the mouse button, and move it in the desired direction, depending on the task.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003437926/original/U2BjiOZ\_9Oqlxz98CGVcSLFm41dhfj1L3w.png?1645703789

### Adding a block

To add a new block, click on the "+" sign next to the department under which you need a new block:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003437928/original/IRS5WEawRBBkJ-m0OG83qX9nAPT9LXk-SQ.png?1645703790

After clicking on this button, a window will appear where you need to enter the name of the new department and specify the title of the managerial position in that department (e.g., "Commercial Director").

However, the block may not be added in the desired order relative to the current ones. This can be easily fixed with sorting.

### Sorting blocks

Currently, the system allows setting the order of blocks using the "Sort" field in the additional block settings (click on the gear icon next to the desired block and in the opened window expand the additional settings).

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003437925/original/WJ9gTdgN5iRoO\_AsE2rtvIq3fAkw7t21Mw.png?1645703789

To place block A before block B, you need to set the "Sort" field of block A to 1 less than that of block B. For example, open the settings of block B and see that it has a sort value of 100. Set the value of 99 in block A and save it. After saving, block A will be positioned before block B (blocks are arranged simply in ascending order of the sort field value).

### Adding a block between two others vertically

If you need to not just add another department to a certain department, but add another level of hierarchy, for example, add a deputy between the director and the subordinate departments, it's also easy to do.

### Moving a block to be subordinate to another manager

You may also need to move a new or existing block to another department or division (to be subordinate to another manager). To do this, you need to go to the additional settings of the block to be moved (click on the gear icon next to the desired block and in the opened window expand the additional settings) and in the "Under the supervision of" field, select the new manager for this block. After saving, the block itself and all its subordinates will be moved to the specified department.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003437924/original/iagj6QufBSgdr3g\_YIOuZIDQiTwpnRkuiw.png?1645703789

### Aligning blocks of different levels

In this example, we will look at a way to create blocks on the third level from the main block without inserting an extra second block between them. You can make the superior block at the same level as the others by adding empty blocks between the owner block and the separated blocks.

1. Add a new block to the block with the owner (for convenience, name the position "Fake block" to easily find it later).

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003437919/original/T2tivfvX2rVxEIgixGMNE3yduHD80gGiGw.png?1645703788

2. In the settings of this block, change the sorting so that it is not at the very end, but between the blocks where you need it:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003437918/original/exPQ5fWb\_Vd8roGXRQqwU71ewmP3GS1Nbw.png?1645703788

3. Next, you need to create additional blocks for the Fake block, let's call them "Block 1" and "Block 2":

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003437920/original/oZLUjYQJAtGqBnuAVm167cnE-TZ-WPV3SQ.png?1645703788

4. In the settings of the Fake block, check the "Hidden block" box and remove the position title, and also remove the background of the Fake block in the "Block Color" field in the settings.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003437921/original/Z3vm2TYhmuqn9T0WjEKJ5yeSeUI8BuWnUg.png?1645703789

As a result, you should have a similar structure:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003437927/original/ACHhJjJDv9RHNNVR1AMf2QivCa6Osfilrw.png?1645703789

This way, your department blocks will be at the same level as the others. You can add multiple blocks like this.

### Deleting a block

You can delete a block from its settings (the window that opens when you click on the gear icon next to the corresponding block), by clicking on the red trash bin button.

You can only delete a block that has no subordinates (this is a safeguard in case you accidentally delete a block, such as the director, which would result in deleting half of the structure).

## Advanced settings

### Deleting the entire structure

A user with editing access to the structure can delete the entire structure. To do this, remove all employees from their positions and select "Delete" from the dropdown menu by clicking on the three dots next to the structure settings button.

### Restoring a version

If you made a change and got a result that you didn't want, or if you accidentally deleted a necessary block, you can restore one of the previous versions. Versions are stored for the past 3 days.

You can open the version list and select the desired version by clicking on "Version History" in the dropdown menu next to the structure settings button.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003437903/original/Iym-68tLwDyFPOQxpxPJ5JF6TK1qpGeYGQ.png?1645703785

When selecting a version, it is immediately restored, but the current version is also saved, so you can undo the restoration by selecting the latest saved version.

# Appointment and Removal of Employees in Positions

## Appointment of people to positions

After employees have been added to the project, they can be appointed to positions. To do this, in the structure editing mode, click on the position name in the relevant block or on the gear icon in the top right corner of the block, and then select "Edit employees".

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003438086/original/KpBDnMxcbLek9LPb7EH7TgwmKFIkKPSFkw.png?1645703964

A window will open where you can select an employee. Any number of employees can be selected for each position.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003438082/original/aCEMmMMvo2P8KLSeopJiQYS-46gXSn2pbg.png?1645703962

You can also remove an employee from a position by deleting them from the field. After making changes, click the "Save" button.

## If there is no such button

If you don't have the "Edit employees" button and clicking on the position name does nothing, it is likely that you do not have the permission to appoint employees to positions. To obtain permission, ask the administrator of your project (usually the user occupying the position in the topmost block) to go to Project Settings -> Access.

Under your permissions, in the "Structure" section, you need to check the permissions for appointing line employees or appointing managers, or both.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003438085/original/Rg00wiOj4pv6yU-dVQX\_WBBZyHKHRjrgeQ.png?1645703963

## Probationary period marker

After you have added people to positions, you can indicate whether the employee has passed the probationary period or not. To do this, hover your mouse over the employee's name in the structure editing mode, and a button will appear on the right side of it. Clicking this button will change the employee's status.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003438089/original/0qSP491lLR5gx5MB79eUd7xmXQKGeo93jA.png?1645703964

Employees on probation will be displayed in red, while those who have passed probation will be shown in blue. You can customize the color of employees on probation in the structure settings.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003438081/original/cbdEHuRXhKGUsnTp1nehTQ5wNqfhihK0KQ.png?1645703962

# Frequently Asked Questions about Working with the Structure

## How to print the structure?

To print the structure, you can save it as a PDF in A1 format and then send it for printing.

To do this, in the structure viewing mode, click on the "Export to PDF" button.

A window will open where you need to set the parameters:

- Select Printer: "Save as PDF"

- Layout: Landscape

- Paper Size: Choose a suitable size for your structure

- Margins: None

- Scale: 100, or adjust as needed to fit the entire structure

- Options: Check the Background box to include block backgrounds

- Then click Save button

## How to select a different template after installing one?

To return to the template selection window, you need to delete the structure.

After deleting, the template selection and import will be available again on the structure page.

## How to move a department under another manager?

To move a department under another manager, you need to change the value of the "In charge of" field (located in the settings of the respective department, under "Advanced settings").

## How to add a department between two existing departments vertically?

For example, suppose you have a Sales Department with a Sales Manager position, and under it, there are two branches for Warm Sales and Cold Sales. Now, you want to add a Deputy Manager position between the Sales Manager and the branches of the Sales Department.

To do this:

- Add a new block in the Sales Department structure with the position "Deputy Sales Manager". This block will be at the same level as the sales branches (you can customize the structure later).

- Change the value of the "Under" setting for the sales branches blocks. This setting determines which department/division the edited department reports to. By changing this setting from "Sales Department" to "Deputy Sales Manager," you indicate that the sales branches now report to the Deputy Manager instead of the Sales Manager.

- As a result, you will have the following structure:

```

Sales Department

|

--> Sales Manager

|

--> Deputy Sales Manager

|

--> Warm Sales

|

--> Cold Sales

```

## What to do if the text overlaps?

If you encounter a situation where the text overlaps or doesn't fit within the block boundaries, you need to increase the size of the block to provide more space for the text.

To do this:

- Switch to the structure editing mode.

- Hover the cursor over the bottom or side border of the block (depending on whether you want to expand it widthwise or lengthwise). A double arrow will appear.

- Press and hold the left mouse button and drag the border in the desired direction.

After saving, the text will be displayed correctly.

## Printing the Structure

To print the structure, you can save it in PDF format and then send it for printing.

To do this:

- In the structure view mode, click on the "Export to PDF" button.

- Save the structure as a PDF file.

- Print the PDF file as required.

The ability to save a page as a PDF is available in browsers through the print dialog window. This allows you to save not only the structure but also the content of any other page. To do this, press the key combination Ctrl+P or Cmd+P (on MacOS).

In Google Chrome, in the opened print dialog window, set the following settings:

- Select Printer: "Save as PDF"

- Layout: Landscape

- Paper Size: Choose a suitable size for your structure

- Margins: None

- Scale: 100, or adjust it so that the structure fits completely

- Options: Check the box for Background to include the background of the blocks

- Then click the Save button

![Google Chrome Print Settings](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003438268/original/9ouWdAFhhDkFAVKxSk6VOfYIUeqJFO0Ydg.png?1645704222)

The ability to save a page as a PDF is also available in the Safari browser. In the opened print dialog window, set the following settings:

- Select Printer: "Save as PDF"

- Select: Show Details

- Set the following options:

--- Layout: Landscape

--- Paper Size: Choose a suitable size for your structure (A3 is suitable for larger metrics)

--- Scale: 100 or adjust it so that the structure fits completely (If you need to zoom in on the structure, set values of 110 and above)

--- Options: Check the box for Background to include the background of the blocks

--- Then click the Save button

![Safari Print Settings](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73018926040/original/JVgkq3ZnOrCiT42jhoepUvYFE02SSJF7Og.png?1659545072)

Please note that A0 and A1 paper sizes are not available in the standard print settings. You will need to add them manually in this section:

![Adding Custom Paper Size](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73018926826/original/bfrnHmAljl1unXpdTuVX9Zw01qvvVIPgzg.png?1659545374

Table of Paper Sizes:

![Paper Size Table](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73018926927/original/6IURAaBQeUqVLlyBxHGR2iSxH7\_exoIEjg.png?1659545411)

# Export, Import, and Deletion of Structure

## Export

In this context, export refers to exporting a file that contains the structure of your organization. If you simply need to print or download the structure as a PDF, please refer to a separate article.

Export is available in the structure editing mode for users who have the necessary permissions ("Structure Export").

Next to the settings, there is a button in the form of three dots - clicking on it will reveal the "Export" button.

When exporting, a JSON file is downloaded, which can be imported into another project to create the same structure.

## Import

Import is available on the structure template selection page. This page appears in a new project where there is no structure after deleting demo data.

You can use a previously exported structure from any Platrum project as the import file.

## Deletion

Deletion of the structure is available in the editing mode. You can only delete an empty structure (i.e., you need to remove employees from positions). After deletion, the structure page will display the template selection screen or the file import screen.

Please note that even if you have not assigned any employees to the structure, there will still be an assigned employee at the top level - the project owner. By default, the owner is assigned to the owner or CEO position in the structure when the template is set. You can remove them from the position in the same way as regular employees - by clicking on the position name and deleting them from the field.

# Custom Fields on the Structure

By default, the structure displays the block name, positions, and CKP (Job Description).

You can add additional information of your choice to the block. For example, you can add a field with a list of position responsibilities or a link to regulations.

## How to Add a Custom Field

Open the structure editing mode and click on the "Settings" button.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003441189/original/unD7HlQphhZ1GVNCRb0RfQLZTL5dxI6QRw.png?1645707353

Expand the "Additional Fields" menu and click on "Add Field". Enter the field title and press Enter.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003441191/original/SIwA25ZyRncyXqLT-SdS0nSGFbIPl5Jnuw.png?1645707354

The field is added. Now it can be filled in for all blocks in the structure.

## Filling in the additional field

To fill in the field, click on the gear button of the block and select "Edit Block".

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003441193/original/kXi1fKrQHu3Q7ruPnLTlySdBRjGfSThE8g.png?1645707354

In the opened window, you will see the newly created field. It can be filled in.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003441192/original/CeERy8QMlZZdR\_Fcvdj7HSyYFF7vy\_Dk8A.png?1645707354

## How to change the location of the field

You can arrange for the information from the new field to be displayed above or below the list of employees. To do this, go back to the additional field settings, as when adding a new field.

Click on the three dots of the field that needs to be changed, and customize it as desired.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003441188/original/d3bw-YK7qkQnp\_quHho5eGEEQlv7Bwdtpg.png?1645707353

# Position page

In the structure view mode, by clicking on a position, you can open information about it:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73034206411/original/C0cAHCQaQUDs8OOyVVqB20rY42OGY4bBSA.png?1670261594

You can also open the block by using a link. To obtain a link, click on "Share" next to the position name, and then copy the address from the browser's address bar:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73034207586/original/GrXNfEeUeFJ0Vg5Vvm0V1htVF7I4tom5BA.png?1670262024

## Position

The position information includes:

- Position ID

- Department name

- Job title

- Additional fields (e.g., "Result" in the above screenshot)

These fields are filled out when editing the block, and the filled information is displayed in this section.

## Employees

In the "Employees" tab, you can see the history of employee appointments and the duration they held the selected position. This tab also displays information about previously terminated employees:

[Image Link: https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73034207117/original/-gCaCR0qHTVcgkBy3ATkuoe7MvxaDeLoXQ.png?1670261841]

This data is automatically filled based on the information in your project.

## Job Folder

You can create a job instruction in the Knowledge Base and link the created procedure to the position in the "Job Folder" tab. This way, employees with access to the article can directly navigate from the block to the instruction:

[Image Link: https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73034207366/original/BfeyXstx0daiFq3UcEwSA\_8hgWk0DpXCGQ.png?1670261930]

To add a procedure to a position, click on "Add Article," select the desired article, and click on the "+" icon next to its name in the list.

You can add multiple procedures to one position. To delete one of them, hover over the article's title and click on the trash bin icon next to its name.

## Tasks

In the "Tasks" tab, you can assign tasks to the position. The task is assigned to all employees occupying the selected position. To add a task, click on "Add Task":

[Image Link: https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73037407934/original/IPYgYI2RHS7vvHFBu2Ie7UKjJ3fozhC9ew.png?1672303680]

Please note that position tasks are always recurring, and you can choose the repetition period in the task.

If, for some reason, you need to stop creating recurring tasks, you can pause the task on the same page. This means that all existing tasks will be saved, but future tasks will not be created until you remove the task from pause.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73037408357/original/UbYDA77OxBOS-rv\_Kbw7H\_nY7S0QO1KRCA.png?1672304101

Please note that tasks for the position are always recurring, and you can choose the repetition period. You can delete a task by clicking on the trash bin icon. When hovering over the checklist, you will see which employees have already completed the task.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73037408457/original/vzJ2oAEBvKzs6DjDt5FVpQef0Np0o4l7mg.png?1672304265

If you click on an employee's name, you will be directed to the task assigned specifically to them. From there, you can work on it like a regular task.

# List of Employees

In the Company - Employees section, you can see a list of all employees in your project. Here, you can view their hire date, primary position, profile information, billing status, termination date (if the employee has been terminated), and other employee data.

## Who Has Access to the Data

Most employee data is visible to all others, but there are certain fields with restrictions:

- The hire date is only visible to those who can add or edit users, as well as those with access to "View Hidden Fields."

- The termination date is only visible to those who can delete or edit users, as well as those with access to "View Hidden Fields."

The corresponding access is granted to employees in the access rights settings:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003086274/original/ymOG8jUWqBA\_sg7xMv-\_S8gDhIOv\_Nm84g.png?1645108490

## Editing Employee Data

Viewing an employee's profile is available to all employees, but only employees with the appropriate access rights ("Edit Users," "Add Users," and "Delete Users") can edit data or add/remove users.

### Hire and Termination Dates

By default, the hire date is set when inviting an employee to the project, and the termination date is set when removing an employee from the project. If needed, you can update these fields to match the actual dates based on documents.

Terminated employees can be viewed by toggling the corresponding switch in the filters:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003086342/original/nnMb074n6XWoUXzEnLz2Gcm1q13FZQaxWw.png?1645108533

Viewing terminated employees is available to the project administrator, as well as employees with access to view deleted users.

### Anniversaries

With access to view hidden fields, the employee also gains the ability to view the "Anniversaries" page.

This page displays a list of employees with their upcoming anniversaries. Currently, there are two types of events available:

- Work anniversary in the company (celebrated at 3 months, 6 months, and annually)

- Birthday (celebrated annually)

[Anniversaries Screenshot](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003086385/original/iO7L2CTC7Ib6UP89j5v4QakyeEyJXz4l3A.png?1645108552)

### Status

The status determines whether an employee will be considered in billing. If the status is disabled, the user will not be counted in the license, and they will not have access to your project.

[Status Screenshot](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003086399/original/FJvItG\_03Y1Qa3gIYQYc2QVj\_7iU6CX0Iw.png?1645108567)

This is useful in cases where you need to add employees to the structure, but they will not be using the service.

For example, you may have laborers or external contract workers who participate in company operations but cannot see internal data of regular employees and do not use personal accounts.

You can only switch the employee's status if you are the project owner or if the owner has given you the appropriate access (Settings - Access - Billing - User Billing). Additionally, the user must have basic access to view the structure.

[Status Screenshot](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003086418/original/uKmRsRaw7Ko2ItkcfMcl14L-vz2E5KNtFw.png?1645108583)

### Primary Position

Often, an employee may hold multiple positions in the structure. However, typically one of the positions is their primary position, while the others are secondary. By default, the system takes the highest hierarchy position among those held as the primary position, but you can change the value in this field to update it.

[Primary Position Screenshot](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003086433/original/6Diozc\_4Py07NmBiMaEmq\_3G0muYCgmwVw.png?1645108602)

### Work Schedule

You can change the work schedule for each employee.

### Additional Fields

In addition to standard fields, you can add your own fields to an employee profile card that may be required by the HR or personnel department, such as insurance coverage, qualifications, extension number, city or office (if the company has multiple offices or remote employees), etc.

To add new fields, open General Settings -> Profile Fields. In the opened section, you will find a list of current fields and a button to add your own field.

# Getting Started with Employees in Platrum

When creating a project in Platrum, one of the first and main steps is to add and configure employees. The process of adding employees to the project, assigning them positions, granting necessary permissions, and setting work schedules is described in the step-by-step articles in the following section:

Step 1. Adding Employees

Step 2. Viewing and Editing Employee Data

All added employees are displayed in a single list, where their data is shown and can be edited by the owner or an employee with special access. Add employee phone numbers, photos, birthdays to help new employees orient themselves in the team, and avoid HR having to maintain separate tables to store all employee data - everything will be in one place according to the instructions.

Step 3. Assigning Employees to Positions

To specify an employee's position and allow them to start filling in metrics, they need to be assigned to their position in the structure.

Step 4. Configure Special Permissions

In addition to regular employees, the company may have individuals responsible for finances, inventory management, quality control, or training. Each of them needs special permissions to customize the tool to the company's needs, so that the owner doesn't have to do everything for everyone.

Step 5. Set up work schedules

In many companies, different departments may work on different schedules. Some may work a regular five-day week, some a six-day week, some on a rotating schedule, and others may work without weekends. To accommodate such situations, there is an option to specify the work schedule for each employee so that their metrics are displayed correctly.

The configuration settings for metrics are covered in a separate section titled "Metrics".

# Adding and removing employees in the system

## Adding employees

To assign a specific employee to a particular position, you first need to add them to the system. To do this, go to the "Company -> Employees" section.

If you have permission to add employees, you will see a button in the upper right corner to add a new employee.

![Add Employee](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003441366/original/pHvBRrRWcSuIPY9BPyW5-yX9fOzAl1wC2g.png?1645707542)

There are two ways to add employees:

1. One by one

To add an employee, you only need to specify their email, which will be used for logging into the system. The password will be sent in the welcome email to this email address. If you don't specify a password when adding an employee, it will be generated automatically.

If you have already added employees and configured permissions for them, you can choose an employee who already has the required set of permissions from the "Permissions like" field. For example, if you have already added a knowledge base and academy administrator and you need another employee with the same permissions, you can select them from the dropdown list in this field.

1. Bulk addition

This method is convenient if you need to add multiple employees at once. You can write the email, name, surname, and password for each employee on separate lines, separated by commas.

![Bulk Addition](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003441369/original/O3s6tQbgLcwaq3jQOiCKs4UJ51uOWpB2kg.png?1645707542)

Please note that if an employee is already registered in Platrum, their current password will remain even if you assign them a new one when adding them to your project.

### If employees do not have an email address

There are situations when you need to add employees without an email address. In this case, you can specify a shared company email and add numbers after the login for each employee using a plus sign.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003441365/original/75PH\_TB\_ryhfMF9u\_8N81I5nFuPJIK89Ww.png?1645707542

This way, all employees added in this manner will be able to access the project using the email with numbers as their login.

## Deleting employees

To delete an employee, go to the employee list page (in the "Company" section) and click on the trash icon next to the desired employee:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003441367/original/5HwuMQkU7yElkO6u7w-gMSnkS465MYazXw.png?1645707542

Alternatively, open the edit panel for that employee (by clicking on their name) and use the "Delete" button. In the employee edit panel, you can also set a termination date.

If you are unable to open the employee edit panel, you do not have "User editing" access.

You can also change the status of employees instead of completely deleting them from the structure. This way, you can activate them at any time, but while the status is inactive, the employee will not be able to use the service in your project.

# Assigning and removing employees from positions

## Assigning people to positions

After employees have been added to the project, you can assign them to positions. To do this, in the structure editing mode, click on the position name in the desired block or the gear icon in the top-right corner of the block, and then select "Edit employees."

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003441644/original/YMNMhb6CXG1YFTxnoy74pEbVeyPsHk2wFQ.png?1645707730

A window will open where you can select an employee. You can assign any number of employees to each position.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003441642/original/KhDZnwj50xPuCFvL85eU6vm2m5Ft\_6vzxg.png?1645707730

You can also remove an employee from a position by deleting them from the field. After making the changes, click on the "Save" button.

If there is no such button

If you don't have the "Edit Employees" button and clicking on the job title does nothing, it's likely that you don't have the permission to assign employees to the position. To gain the necessary permission, please ask the administrator of your project (usually the user in the top block) to go to Project Settings -> Access.

In the Access tab, under the "Structure" section, you need to select the permissions for assigning linear employees or assigning managers, or both.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003441643/original/yZCORcJG2hkPeiyFkVCdl46TX\_Qx0V-5dw.png?1645707730)

## Probationary period mark

After adding people to the position, you can indicate whether the employee has completed their probationary period or not. To do this, hover over the employee's name in the structure editing mode, and a button will appear on the right side which, when clicked, will change the employee's status.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003441645/original/Nfw8hPcvMy-ofq5S2GLgAV8Q95jfoZ0CkQ.png?1645707731)

Employees on probationary period are shown in red, and those who have completed the probationary period are shown in blue. You can customize the color of employees on probationary period in the structure settings.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003441646/original/BpPWhNb37-rrJwoeOn-AVb6yc3TFyToiyQ.png?1645707731)

# User Access Settings

Most accesses in the system are tied to positions (access to knowledge base articles, courses, finances, dashboards, checklists, etc.). This is done to automate the access management process. As soon as an employee takes a position, they immediately gain access to all the necessary materials and project sections.

By default, all employees have access to:

- Viewing the structure

- Reading documents in open sections of the knowledge base

- Viewing and modifying their own metrics and subordinates' metrics

- Creating dashboards

- Creating financial plan requests (if at least one expense type is created for the position)

However, some sections and tools require specific access settings for individual users in your project. This can be done on the "Access" page in the settings.

To access it, click on your Avatar in the top left corner -> Settings. The settings panel will appear with a section for tool settings, and under general settings, there will be an "Access" option, as shown in the screenshot:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003442002/original/hi\_BSKUEKAxVF1hUmGGG5QmxdrQxSj5bjQ.png?1645707920

If you don't see this option when accessing the settings, you probably don't have permissions to edit access rights. You will need to contact your project administrator to obtain the appropriate permissions.

In this section, you will see all project users and their individual tool access rights. You can edit the access rights for each employee.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003442006/original/8QPZhDFIczr97pDnT83SQKlIJAVOrPfYiA.png?1645707921

# Employee Work Schedules

## Work Schedules

You can assign each employee a corresponding work schedule. By default, one weekly schedule is created in the project, with two days off (Saturday and Sunday) and a set of additional days off and working days based on the production calendar. This schedule cannot be deleted.

In addition to this default schedule, you can create your own schedules. This is done on the "Work Schedules" settings page. The schedule can be either weekly or have a custom cycle:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003442989/original/p1Oua\_dQqP\_\_RaWUr2TBN\_3jTrOCunCbqQ.png?1645708679

- In the weekly schedule, you can configure days off (for example, if you have a six-day workweek and the default schedule doesn't fit), additional days off (holidays), and additional working days.

- In the schedule with a custom cycle, you can specify the number of working and non-working days in the cycle, indicate on which days the schedule starts (for example, you start the first shift on working days and the second shift on non-working days), as well as specify additional days off and the start date of the cycle (from which date the system will start counting according to this schedule, in other words, the first day the schedule becomes effective).

--- For the schedule with a custom cycle, you can view the resulting distribution of working and non-working days by clicking on the calendar icon:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003442993/original/\_NkLy5Fp7FhI2FpocnE9sYPyhmlxESwCyg.png?1645708680

Employees with viewing and editing permissions for work schedules can view and edit the schedules.

### More about additional days off

In the settings under the "Production Calendar" section, you can configure additional days off/working days. By default, they are not included in newly created schedules.

[Link to image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003442991/original/-9NY3tRtiCpjQ5sYv6oTs8-KPFgkvkxgww.png?1645708680)

If you need the additional days off/working days in a new schedule to correspond to those specified in the production calendar settings, you need to click the "Supplement from Production Calendar" button when creating/editing the schedule.

[Link to image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003442990/original/9Mi2BgFahkuZUqJp-rJJYNZlwsUSqhXNoA.png?1645708680)

### Working schedules and metrics

The metric chart only takes into account working days. If the end of the reporting week falls on a holiday, the previous day will be displayed on the chart. The daily metric chart only shows working days, so the metric chart for an employee working in shifts will be displayed without gaps on weekends.

Once a working schedule has been assigned to an employee, it is recorded in the history. For example, if an employee initially worked on one schedule and then switched to another, the historical metric data will be displayed according to the old schedule, while new data will be displayed according to the new schedule.

### Assigning a working schedule to an employee

An employee with user editing access can assign a working schedule. To do this, open the user editing panel in the employee list under the "Company" section and select the desired schedule from the drop-down list.

[Link to image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003442992/original/e0MHRHDThYWlDROz3dOYPRv3tNkHLf9Rag.png?1645708680)

The schedule is assigned to the employee, not the position. For example, in your sales department, employees work on a 2/2 schedule. If you hire a new employee and assign them to the sales manager position, this schedule will not be automatically assigned to them; it needs to be assigned to the employee separately.

Please note that the schedule for an employee takes effect from the date of assignment. It does not change past periods in the metrics but only starts to apply from the moment of assignment.

# Creating articles and access to them

## Why do you need a Knowledge Base?

A Knowledge Base is a tool for storing and working with all company documents and written materials, such as regulations, job instructions, training articles for employees, and technical documents.

A properly organized and populated Knowledge Base can significantly automate several processes within your company: expedite the onboarding of new employees, protect against knowledge loss when old employees leave, provide quick and convenient access to necessary information for every employee, and improve outdated processes (which may have never been documented or have been described a long time ago and no longer correspond to current realities).

Furthermore, you will make every document work for you, as the Platrum Knowledge Base includes an Academy feature. You can add assessment questions to each article and create courses and exams from them, which will automatically educate your employees and help monitor their knowledge.

Below, we have prepared navigation to the main articles and steps for setting up the Knowledge Base:

## Adding the first section and article

A proper structure within the Knowledge Base is essential. In addition to enhancing clarity, it allows you to easily assign access and responsibility zones within each section. Once you have organized the structure within the Knowledge Base, you will no longer have to think about it because the system will continue to function without your involvement.

## Populating articles with content

### Configuring access to articles

After defining the structure, it is necessary to immediately configure access for each section and folder. The principle is simple: the corresponding department manager is responsible for the entire section, and the department's or unit's subordinates are responsible for each folder. This system provides clear division of responsibility for each document in the Knowledge Base.

### Collaborating on documents

After drafting the initial version of a document, you may need to show it to your colleagues in order to receive their comments and suggestions for improvement or correction.

At this stage, you will learn how to organize this process in Platrum.

### Making documents work

Now that you have a configured and populated Knowledge Base, it's time to ensure that all your documents and regulations are not simply gathering dust. Add assessment questions (see [here](https://help.platrum.ru/article/23-article)) to each article and initiate employee education and knowledge control processes. Afterward, the level of knowledge among your employees will increase exponentially, any changes in critical documents will be guaranteed to be read and assimilated promptly by everyone, and new employees will be able to achieve results much faster.

### Introducing the report

The report will help you find documents that nobody reads, documents that nobody has access to, documents without verification questions, and much more.

# Creating folder and article structure

The knowledge base contains sections, categories, and articles. Using them, you can create any desired structure of documents and folders.

For example, you can organize the structure in such a way that sections correspond to the departments of the organization, and inside each section, subcategories are formed for the sections and groups. Permissions can be set for folders and articles accordingly.

You can organize the knowledge base according to your vision and business needs.

## Creating a section

When you first encounter the knowledge base, you will have access to a demo section with instructions as an example.

You can create your own section in two ways:

- Click on the "Add Section" button in the bottom left corner of the screen

- Click on the name of an existing section and select "Add Section" from the drop-down list

[Link to image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003640967/original/auru2oRjxNkrr6p\_u0kixsXMIepWNSwixA.png?1646057550)

In the pop-up window, you will need to specify:

- Section name - a required field

- Icon - you can leave it as the default or choose another from the options provided

- Description - provide details about the new section, if desired

- Sorting - a setting that allows you to specify the desired order of sections. The sections will be displayed in ascending order based on this parameter. For example, you can specify 10 for the first section, 20 for the second, and so on. The step of 10 is used to easily insert additional sections between the existing ones.

[Link to image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003640961/original/WNnLJM1n0U0WlXQ\_udg6wNifONVUqmmStA.png?1646057549)

After creating a section, you will be prompted to create the first article.

[Link to image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003640963/original/LASy5U\_qypY5odiAzPvyK7k-02sed0nB8A.png?1646057549)

## Creation of articles and categories

After clicking on the "Add Article" button, the article editing window appears.

If you leave the article empty, specifying only the title, you can use it as a category or subcategory, creating new articles within it. For example, if your company has different departments, categories can be assigned to specific sections or groups. Subsequently, when adding subordinate articles on this page, their list with links will be displayed.

For example, in the "Distribution Department" section, we created a category called "Sales Department" with two subcategories, "Warm Sales Department" and "Cold Sales Department":

[Link to Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003640964/original/oEjSIQJd8RrN\_ZGFblVnfgpHXCMAkWo2tA.png?1646057550)

To populate categories with new articles, click on the "+" symbol next to the name of the desired category:

[Link to Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003640966/original/8JeGf1ITS1h5wtp0Z3FV6rAOYAm\_GpwKOg.png?1646057550)

## Moving articles

Categories and articles can be rearranged by holding the three-line icon and dragging the article to another position.

This way, you can move the article within the parent subcategory.

To move an article to another category or section, click on the "Change Location" button (the pencil icon above the article title) and select the desired section or category from the dropdown menu:

[Link to Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003640965/original/9v\_8gTcYky\_xVeLn1SDTvRfRsi-QRmVvlQ.png?1646057550)

## Deleting articles and sections

If you need to delete a created section, go to it and click on the gear icon on the right side of the section name, select "Edit Section":

[Link to Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73033754107/original/VahkJvvzPD6Y8\_9q6fM-m9LI\_l-7gMNQKA.png?1669900400)

In the opened window, click on "Delete," and the section along with the articles in it will be completely removed.

If you need to delete an article, go to it, in the upper right corner, click on the three dots, and select "Delete":

[Link to Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73033754384/original/t88EGPUTaUiyA3FqOqfAVpjYwfuJGsq9ZQ.png?1669900551)

## Public section

In Platrum, you can share the content of a section with other people outside of the project using an external link. To do this, you need to make the section "public".

To make a section public, click on the gear icon next to the section name, select "Edit section", and then toggle on the "Make section public" switch.

Below, you can change the article URL if the default one is not suitable.

To make the content of the section accessible to users without authentication, you need to send them the URL that appears in the Public URL field, rather than the one in the address bar.

Please refer to the following image for visual guidance: [Public section image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003640962/original/dewpXqDCx5OxX8AHwFaW9Al77zbG11p1aQ.png?1646057549).

Currently, only an entire section can be made public. It is not possible to make individual articles public.

## Sorting sections

To arrange sections in the desired order, you need to assign appropriate sorting in the section settings.

Please refer to the following image for visual guidance: [Sorting sections image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003640969/original/ivcMkDbNMnfw-XXx3xR\_V7fNwevFooOc8w.png?1646057551).

To have a section displayed at the beginning, assign it the lowest sorting value.

Please refer to the following image for visual guidance: [Lowest sorting value image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003640968/original/Cgmm8bBqbK6dLkkGy0gm1qksJHAz9KN62A.png?1646057551).

The smaller the sorting value, the higher the section's position in the knowledge base structure.

# Access settings for articles

Platrum's Knowledge Base provides a flexible and secure system for configuring access to articles and sections. You need to configure it once, and each new employee will automatically gain access to the necessary materials when assigned to a position.

## How access works

By default, all employees in the company have access to view all knowledge base materials.

Access settings are provided for cases where internal regulations and materials of a specific department should only be visible to employees of that department, or when access to regulations for managers needs to be restricted for ordinary employees.

All accesses in the Knowledge Base are inherited from a more general section/category to its subcategories. This means that if you set access to a section it will, by default (unless you configure otherwise), apply to all materials within the section.

Once you have created your first sections in the knowledge base, you can start configuring access. We recommend doing this immediately after defining the structure of the knowledge base, so that when you populate it with articles, they will only be accessible to the relevant individuals.

## Access to Sections

Access to a section can be configured in the left panel by clicking on the settings icon next to the section name:

[Access Settings](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641057/original/Vv1ZvjsV8q0i0CU5r30YCVhoH42PZA9MCw.png?1646057629)

Clicking on "Access Settings" will open a window where access can be selected.

Additional Information:

Initially, sections are created and access is assigned to an employee who has been granted "Knowledge Base Administrator" access in the project settings.

Subsequently, the employee can view and edit articles of all sections, regardless of the access settings for those sections.

There are two types of access for sections:

- Editing

- Viewing

### Editing

After the Knowledge Base Administrator grants access for Editing, the Editor can:

- Edit articles and categories within the section

- Create new categories and articles within the section

- View version history

- See comments, suggestions for corrections, and accept/reject them

- View comment/suggestion history

- Grant access to their subordinates

The Editor cannot edit access in the top-level article they have access to. In other words, if they have access to a section, they can only edit access in nested articles and categories within the section. The same principle applies to access to article categories.

### Viewing

If an employee is granted access only for Viewing, they can see all articles within the section without the ability to view comments on the articles, view version history, suggest changes, or grant access to other employees.

In our example with the Distribution Department section, we will restrict access to only employees from the Distribution Department being able to see the articles in the section, while the sales department and distribution department managers can edit the section:

[Access Settings Example](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641058/original/X0TFdbls0X8Poht73ry0qtFepCWJPUlsTQ.png?1646057630)

To avoid individually adding each position to the access settings as the company grows and new sections and positions are created, you can activate a setting to make a section accessible to all subordinates of a specific position.

To do this, in the "Who can see articles in the section" field, select the managerial position of the department and click on the arrow on the left:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641059/original/YwWT74gYJmz1r8EOqaZBGsTUpZthQgWAvQ.png?1646057630

## Access to Articles

When we grant access to a section, all employees in the selected positions will have access to all articles in that section.

Within an article, additional access settings can be configured. This is useful if there are multiple sections within a department, so that each section administrator can make changes to their section's regulations, while employees from different sections can only see their respective regulations but still have access to general ones.

To configure access rights for an article, click on the ellipsis in the top right corner and select "Access" from the drop-down menu.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641060/original/aJs8\_8qY9Yjt5zvj7U-vKq9OElHtemqIEw.png?1646057630

In the pop-up window, you can assign employees for the desired type of access.

Unlike sections, articles have 3 levels of access:

- View

- Edit

- Comment

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641061/original/ijEEAfcItHBTRtxLS-YSVTjmasosYBkIfw.png?1646057630

Access for viewing and editing functions similarly to section access.

Addendum:

If access to viewing an article is additionally restricted, its link to the parent access is severed, and the article is displayed separately in the section access settings.

This way, the Knowledge Base Administrator will see that there are articles in the section with special access.

Access beyond parent access can only be granted by the Knowledge Base Administrator.

If you grant access to a folder with articles, all articles in that folder become accessible to the employee. The exception is if there is an article within the folder that has its own special access.

For example, I granted all sales department employees access to the folder for commenting. However, within the folder, there is an article that only the sales department manager has access to.

Regular employees will not be able to see such article.

## Commenting

Employees selected in the "Who can work with comments in the article" field are given the ability to leave comments in the article and suggest corrections without being able to edit the article. Such employees will also be able to view the article even if it is still in draft status, as they need to participate in working on this article.

If there is a reaction to a comment or suggestion, the employee will receive an email notification. The employee can also view the comment history.

In our example, articles in the Sales department section are only available to sales department employees. If it is necessary to grant access to an article in this section to an employee from another department, only the Knowledge Base Administrator can do this.

# Working with Article Content

The Platrum Knowledge Base editor is based on a block principle. Each piece of content (table, image, paragraph, list) is a separate block that can be edited and moved within the article. Let's take a closer look at the features of working with the editor.

## Text Editor

### Blocks

The essence of a block is that it is a separate part of the text that can be moved, deleted, or specially highlighted. An editor block is analogous to a paragraph.

To start a new block while entering text, simply press Enter or place the cursor with the mouse on a new line.

Here is how two separate blocks look:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641271/original/SJnL6Nh3\_EzWFFJSTPod\_EGQE4AOzPwFqg.png?1646057738

When a portion of text is selected, a formatting menu appears where you can choose standard styles or clear the styles.

### Links

To attach a link to the highlighted text, select "Link" in the menu and a field will appear for inserting the link.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641264/original/y-FxwpgwBv9lopsOdmofXJ\_Dx095Y8g-Tg.png?1646057736

In this field, in addition to the link, you can also add a header ID to refer to a specific part of the text within the article (anchor link). You can copy it by hovering over the desired header in edit mode:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641267/original/5pmxVSs\_0J98LKtDbsvr6kfJbiqjDhk6Rw.png?1646057737

If you need to refer to one of the already created articles, a specific employee in the structure, or a department, you can do so using the #, @, ^ operators respectively.

For example, we want to display an employee's profile from the structure when hovering over their name. To do this, we place the @ sign in the desired location in the text and select the employee from the dropdown list:

[Employee Profile Screenshot](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641273/original/4E9uFqodrchxbmn4ZVXP5GQdRdQfWk4SFg.png?1646057738)

In another document, we need to specify the department name to avoid updating the document every time there is a change in personnel. To do this, we use the ^ operator:

[Department Name Screenshot](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641261/original/PHnA7p4Rbbv0WjsC35WnNAGiBZ0Bg7aSmg.png?1646057736)

Similarly, we can refer to one of the added articles by placing the # symbol in the appropriate location in the text:

[Referencing Articles Screenshot](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641265/original/y8aDi1ncG6C9kn9q5vtdBGiLNWpfkJIDiw.png?1646057736)

### Content Types

When hovering over a text block, you can see the "P" symbol on the left, indicating that the block currently contains text. If you hover over the letter itself, an arrow will appear, clicking on which will display a list of all possible content types:

- Headings H1 and H2

- Quote

- Lists (numbered and bulleted)

- Table

- Highlighting in three colors (red, yellow, green)

- Image (PNG, JPG, GIF)

- Code

- Video Hosting - adds a video from YouTube or RuTube by embedding a link

- Audio Player - for embedding audio files (MP3, WAV)

- Video Player - for embedding video files (MKV, MOV, MP4)

- iframe - a container for loading content from another resource (e.g., a chart from Google Sheets)

- File

- Columns (30/70, 70/30, 50/50)

[Content Types Screenshot](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641275/original/-wzy8VHxi13tHxe9NQ58GPg\_HajMYRlzBQ.png?1646057741)

In the example below, we added references to an employee and other knowledge base articles, a quote, an iframe, and 50/50 columns with different colors:

[Example Article Screenshot](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641269/original/kKEyO\_v2hv620eyL8VEBSgpdPZij4\_WZjw.png?1646057737)

You can create numbered and bulleted lists by clicking on the corresponding buttons in the toolbar above.

If you need a nested list, select the list type (numbered or bulleted), enter at least one line, then go to a new line and press Tab.

Any block can be rearranged with another. To do this, hover over the block to display the two-arrow symbol. While holding the cursor on this symbol and moving it up/down, you can move the block as desired:

[Moving Blocks Screenshot](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641274/original/5O0I-quHD2VQFZoERIqxf9cW2043OxCJtQ.png?1646057740)

| Note: Currently, you can only move a block within the screen boundaries. If you need to move the block lower, you have to do it gradually. This will be improved in the future. |

If you made a mistake, you can undo the action or redo the last undone action. To do this, there are corresponding buttons in the top left corner:

Undo - https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641248/original/MBGkK5vb0ZLRRczUEc3iOogUOW3gqCTxrA.png?1646057732

You can also undo an action using the Ctrl+Z command.

You can transfer your knowledge base from another resource to Platrum. The editor supports pasting text from other documents while preserving the main styles and headings.

If you encounter any display errors when transferring the text, please contact us (https://t.me/platrum\_help) and we will correct the mistake.

## Saving

After working with a document, you need to save it to prevent the changes from being lost. If you accidentally close an article without saving, the entered changes will be saved only in your browser. In this case, when you next visit the section, you will see an icon with an exclamation mark next to the article and a note indicating that there are unsaved changes:

Unsaved changes - https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641268/original/soDkAI-N6LRQgjv8cCy\_QqdD4aiLCEnX-A.png?1646057737

Important: If you access the knowledge base from another device, you will not see the latest unsaved edits. You must finish editing in the same browser where you started it. Until then, other employees will not see the unsaved changes.

You can save a finished article as a publication, visible to everyone with access, as well as a draft.

### Save as Draft

If an article is saved as a draft, only the author and employees with editing and commenting rights can see it. All others will not see the article in the structure or through the link.

You can save as a draft while in editing mode:

Save as Draft - https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641270/original/iJUai-V\_iO7fgsTsQbeJEroxrCw-FZ9FMw.png?1646057738

You can also make any finished publication a draft if you need to make changes. This can be done in the additional settings by toggling the switch:

Convert to Draft - https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641249/original/dRFsugNO5MN4zIJiGk0fVPF5IBwADtEUbg.png?1646057732

### Save

If the work on an article is already complete, you can save it using the green "Save" button. In this case, the new article will be visible to everyone with access to this section or category, unless otherwise specified in the article's access settings.

## Additional Actions

### Human-readable URL

By default, the article title in Latin is included in the URL. If it is not satisfactory or the article title has changed and does not match what is in the URL, you can specify your own title with this setting.

[View image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641262/original/8FptzZKQ\_\_tcuZ9b4vTjMvIEy1K1kzf7gw.png?1646057736)

### Version History

Employees with editing access can view the history of all article changes by date and the author of the changes. If needed, you can select one of the versions and in the editing mode, a "Restore Version" button will appear.

[View image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641263/original/OfN88jXT0Jv5SlE1eSDbUaJquGOQmSXILQ.png?1646057736)

[View image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641241/original/aWReLIPyViImzzjn8TDw25JFiougw0-mUg.png?1646057729)

### Add to Favorites

To have quick access to certain articles in the Knowledge Base, you can add them to your Favorites by clicking on the heart icon in the upper right corner while in viewing mode.

The favorite articles will appear on the main page of the Knowledge Base in the corresponding section.

[View image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641272/original/6vFfaU0Sth7KQXjqszRtB7rFgwPwMDtMsA.png?1646057738)

Editors and employees with commenting rights can also view the history of comments and suggestions.

### FAQ

Here are frequently asked questions from clients and their answers:

Is there a character limit for articles?

No, you can create articles of any size and content that are convenient for you.

# Knowledge Base Report

The Knowledge Base includes a report on article views, which will help you find regulations that nobody reads, check for regulations without tests, ensure that a confidential document is accessible to a small number of employees, etc.

You can access the Knowledge Base Report on the main screen of the Knowledge Base by clicking the button in the upper right corner.

[View image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641501/original/kDr3tE6wTCtge9lQSBkTT9kMCB18SPmmNg.png?1646057864)

Employees with "Knowledge Base Administrator" privileges have access to all the information in the report.

If an employee has editing access to articles, they also have access to the Knowledge Base Report, but it will only show information about the articles they can edit.

## What the report consists of

The report table displays articles grouped by sections, the authors of these articles, and the article creation date. If necessary, you can hide the grouping by sections by checking the box next to "Hide sections".

[Image Link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641502/original/ANIQGNMhJr7dzKgYC3fNSC0QrF7\_8p-ORw.png?1646057864)

Next, the table displays the following indicators for each article:

- Number of tests (number) - displays the number of questions added to this article. This helps quickly identify articles with no questions added.

- Number of courses (number) - displays the number of Academy courses in which the article is included. This helps analyze when the article content is frequently tested and when it is not included in any tests.

- Employees with access (number) - the number of employees who have access to the article, excluding the Knowledge Base Administrator.

- Unique views (number) - the number of employees who have viewed the article at least once, excluding the Knowledge Base Administrator.

- Views from accessibility (percentage) - the ratio of unique views to the number of employees who have access to the article. This indicator helps solve several tasks:

--- identify a problem when the person responsible for writing regulations did work in vain and further work on eliminating inefficiency is required;

--- analyze which articles are not being read and what they are about in order to optimize the knowledge base without compromising its usefulness.

All indicators can be sorted in the table. For example, if you need to find articles with the least popularity first and then those with no questions added, sorting will help you with that.

You can search for articles by title if you need to view statistics for a specific regulation. The search does not work based on section names.

# Collaborative work on documents

## What is this article about?

With this mechanism, you can organize the process of collaborative work on a document by all interested parties. Your colleagues will be able to suggest their changes and participate in discussions, and you will be able to easily accept or reject changes in one click.

## Working mechanism

### Who can leave comments or suggestions

Employees with access to comment on an article can create comments and suggestions for changes in the text in that article. Such an employee can also view other people's comments and suggestions and participate in discussions.

The commentator will be able to view the article, even if it is in draft status (meaning you can create a draft in the desired folder and collaborate on it with colleagues until it is completed, and then publish the final document). Additionally, by default, any editor of the article can leave comments and suggestions.

Access is configured in the same place as access for viewing and editing the article.

Employees with regular viewing access will not see comments; for them, the article will appear as usual.

### How to leave a comment or make a suggestion for text changes

To comment on or change a specific text fragment, you need to highlight it and select the desired action from the menu that appears:

[Link to menu options](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641621/original/PvtcOIazb2hL48vuLR\_awDAp7TsL8mg7yw.png?1646057935)

After selecting "comment," you can enter your comment and immediately see it in the article after saving it.

[Link to comment example](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641619/original/WVZo4DCE3eKNNxQh2xicwUgJVDPgO-Wk5Q.png?1646057935)

[Link to comment example](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641617/original/rDqR62YKPUFkMw1EgOYZzRw0sWINQBRb0A.png?1646057934)

Your own or someone else's saved comment can always be viewed by clicking on the highlighted section in the text or on the comment mark on the right:

[Link to comment example](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641620/original/zA7P-vtnSl4Y6MxTMCutf0BHDp2ceTmt3w.jpeg?1646057935)

Similarly, for a suggestion for changes, after selecting the appropriate option from the menu that appears when selecting text, the highlighted text becomes editable, and you can enter your suggestion:

[Link to suggestion example](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641626/original/Lma1NaStD1he6ito4Z9zPOPuG0b8CW-lag.png?1646057940)

Suggestions can be viewed in the same way as comments (as shown above).

In comments and suggestions, you and your colleagues can leave an unlimited number of replies:

[Link to reply example](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641618/original/yr6\_kDswJEt2ZSAC2tT8-tOZh3AcS2AXPQ.png?1646057934)

When replying to your comment, you will receive a notification. You will also receive a notification when your edit is accepted or rejected:

[Link to notification example](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641616/original/lk921ah7y2unEm0uKGxkYTVdTwKOom-hdQ.png?1646057934)

### Who can handle the comment

The article editor can mark the comment as resolved or accept/reject the suggestion. When the suggestion is accepted, the text is automatically replaced.

All accepted and rejected suggestions and comments are stored in the history, which can be accessed by clicking on the comment icon at the top right.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641611/original/7lQCVGCDe0g6oq1ywyAWFoMcYhJvYwy5Ew.png?1646057932

Articles with comments or suggestions will also be marked with a special symbol in the left navigation panel.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641615/original/-KJIvOZP30t\_4\_Rz8RT-FpeN4d87dQyUxg.png?1646057934

# Import from Notion

## Step 1. Creating a new integration in Notion

To begin, you need to create a new integration in Notion to transfer the Knowledge Base to Platrum.

Go to the page

My integration (https://www.notion.so/my-integrations)

via the direct link:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73013544898/original/ZXs7RJYpDN5Bdy2SYigJG9OyFQAqCznuQg.png?1655817338

Or through the settings menu in Notion itself:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73013544894/original/Pto\_ddah8kzXLYuoOalBSA8-tmqKExssWg.png?1655817337

Then, add a new integration by filling in all the necessary fields and selecting the workspace that needs to be transferred:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73013544900/original/agwxc-K7Qo9GBygNYx4SjAc9oP4kCpXvgA.png?1655817338

After creating the integration, you will have access to the Integration Token, which you will need in Step 2:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73013544899/original/3LQhKPDcvavrv3WC6JiYWxp7RIWNC8EewQ.png?1655817338

## Step 2. Adding the integration to the workspace

You need to add the integration to the workspace you want to export.

Go to the page of the exported workspace, click on the three dots in the top right corner, and then at the bottom on "Add connections". You will see a list of integrations. In the list or by searching for it, find the integration we created in the first step by its integration name, then click on it.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73024448126/original/VNvt56M4BFtTfIxdR9lTmmySxIMzTZ6pWg.png?1663326671

Confirm adding the integration.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73024448284/original/TH3VrguRPH8E8GhK7Pa6kZsnpIU6Xv-Dxg.png?1663326722

Now, this workspace can be imported into Platrum.

Please note that for each workspace, you need to add the integration separately. If you want to import another workspace, you will need to add the integration to it as well.

## Step 3. Sending the Integration Token to our support team

Now you need to send the copied Integration Token to our support team. You can contact them through the messaging widget in the Platrum project:

[Platrum messaging widget](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73013544896/original/LnHGoedKewp2lc9vEeY7QF10IndkDmw8xQ.png?1655817338)

After sending, you need to wait for a short period of time. We will forward the request to our technical department. The knowledge base will be transferred within 1 business day.

If there are any media files added to your workspaces, they will also be transferred. The following are supported:

- Images

- Bookmarks

- Videos

- Audio

- Code

- Files

- PDF

# Article Templates

## Why are article templates useful?

With this tool, you can use different article templates to quickly create new articles and spend less time filling in regulations.

## How to use them?

When creating an article, you will now have several options:

- Blank with cover - Creates a normal blank article with no information, and you will be prompted to choose a cover immediately.

- Blank - Creates a blank article with no information. Use this if you want to fill in all the data from scratch.

- Article templates - Opens a window with template selection.

- Copy content from another article - Copies the content from another article to the current one.

[Template selection window](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73029807624/original/vYY4z5sLVb8UbTSPLH-y3ePveTOUmbRZJQ.png?1667291543)

You can choose any of the available options or fill in the article from scratch without selecting the suggested options. After selecting a template, all the information from it will be added to the new article except for the title, which you need to add yourself based on your tasks.

Predefined templates will be available for immediate use.

[Available templates](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73033562065/original/6K3fd8GSHSOKPz9kdDWFVfqjLVw7hKBkwg.png?1669801862)

Currently, you can only use these preinstalled templates. The ability to create and edit article templates will be added in the future.

## Template Location

You can find the current added templates in the Knowledge Base under the "Template" section.

In this section, you can enter the template, view it, or use it.

[Click here to view the image.](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73033561712/original/1-UCeGyWqHsUwqrd6YYkhrUyFntfy5ksSw.png?1669801681)

## Access to Templates

The "Templates" section can be accessed by an employee with permission to edit any article in the Knowledge Base.

# Getting Started with the Academy

## Who Has Access to the Academy

The Academy has several roles that provide different levels of access for employees to the tool:

- Academy Administrator: An employee with this level of access can create/edit/delete courses, assign participants, check and reset progress, and assign trainers. They have no restrictions in working with the Academy.

- Course Creator: An employee with this access can create courses, assign participants, trainers, and check participant results. They act as "mini-administrators" in the courses they have created themselves. However, in courses assigned to them, they have the same rights as regular employees.

- Trainer: An employee who can see the progress of all participants in a course where they are assigned as a trainer and check exam results. Administrators or Course Creators can assign trainers among course participants. Trainers can be distinguished from participants by the absence of a progress bar and an academic cap icon.

[Click here to view the image.](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641772/original/8O55yQk7bW2L2w\_XvcoQ1KQSMzj5x5qzaw.png?1646058042)

- Participant: Any employee assigned to a course becomes a participant. Participants can see the course in the "Active Courses" tab and can proceed with it. They cannot see who else is assigned to the course or who the trainer is.

By default, the project owner has access to all actions in the Academy. The project owner also assigns the Academy Administrator and Course Creator in the access settings.

[Click here to view the image.](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641771/original/vcDHu7uj\_2Sb1ZoWKHLAWV8T\_f1wkjVNSQ.png?1646058042)

## Where to Start Setting Up

To begin, it is important to remember that the Academy works closely with the Knowledge Base, and the first actions start from there:

Step 1: Add tests

Courses are made up of articles from the Knowledge Base, as well as tests created within them. After each material in the Knowledge Base, you can add a test question.

Step 2: Create a course

After adding the test questions, you need to create a course and select the materials related to the course topic. This means that articles from one section can be included in multiple courses.

Step 3: Add participants and trainers

In order for employees to be aware of the course and start taking it, you need to add the corresponding positions to the course. After adding participants, some of them can be assigned the role of trainers, so that they can review the results of their colleagues. The progress of each participant in the course is displayed.

Step 4: Add an exam

Exams are automatically generated from the open questions that you included in the course. However, if desired, you can designate any test question as an exam question. The exam becomes available to the participant on the final step of the course.

Step 5: Automatically assess knowledge

In order to ensure that employees do not forget the procedures after completing the course, you can set up automatic assessment. With this setting, based on the materials completed by the participant, a course is generated at certain intervals to review previously studied materials.

Step 6: Customize the academy to fit your needs

After creating and assigning the course to participants, you can explore advanced settings to make working with the academy even more convenient.

# Adding tests to articles

You can add test questions to any article in the knowledge base. The option is available to anyone who can edit the article. Questions can be created as closed (with fixed answer options) or open-ended (requiring a detailed answer).

To add a question, click on the "Add Question" button.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641853/original/-U1b4AwP0YyQ34EmO3g4zSg5ZmBZ6Ptu3Q.png?1646058108)

In the pop-up window, you can enter the question title and select its type (open-ended or closed).

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641850/original/f8kH4pvP8aq2Z9StYgLlwG3lB6wcmCzQuw.png?1646058107)

In the "Points" field, you can specify the points that will be assigned to the participant for a successful answer to the question. The points will be displayed next to the participant's name in the course participant list.

If the question type is Multiple Choice, you can add all the options and mark the correct answer. You can select one or multiple correct answers, making it a multiple-choice question.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641847/original/bez6KAIpmM06eoe-2AN6B-yX9YTEvBLM\_A.png?1646058107)

If the question type is Open-Ended, you can require the employee to attach a file (e.g. if the question involves a test task).

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641851/original/pjsf\_GlFRN8uPVAJ-BCojyIANli9YlpLxg.png?1646058107)

An Open-Ended question is considered an examination question, and it will not be shown to the employee as part of the test step but will be included in the exam. You can also make a Closed-Ended question an examination question by clicking the button that looks like an academic cap.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641849/original/fBR\_WBaH2hwnZ4g-uqAed9XNGpS9cg4SwQ.png?1646058107)

If this mechanism does not suit you and you want all questions to follow their material, including the open-ended ones, you can remove the examination status from the questions by clicking the button that looks like an academic cap.

In this case, the questions will follow their materials without grouping into an exam at the end of the course.

When a student is taking the course, they will not be sent for checking after each question but only when all the questions are answered.

This setting allows you to customize employee course completion more flexibly, but we strongly recommend not disabling the examination status for open-ended questions, as it will help you better assess your employees' understanding of the material.

# Course Creation

On the main page of the academy, click on the "Create Course" button:

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641953/original/zTDbRL03qSIY5bfGzRE4KxSbdM5LI52RCQ.png?1646058175)

In the opened course creation window, enter the name of the future course. You can also upload a cover image and come up with a description.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641959/original/CpSaSbVNxHvqJV6cYQ01Igd\_oS6cpbgUhg.png?1646058175)

Add the material that this course will consist of. The list of materials is taken from your knowledge base. In the expanded window, select the necessary articles by clicking on them. If you need to add multiple articles from the same folder to the course, click on the "+" next to the folder name. In the example below, it is the "Rules" folder.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641964/original/P4xVZ3yImYVaYP6zeSjT\_ZkwUey6Yike4Q.png?1646058176)

When selecting an article with tests, the tests are automatically added as the next step. If desired, like any other material, it can be removed, leaving only the article (to do this, hover over the material and click on the trash bin).

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641957/original/OMvBkN3fjjT175Ww3eIa0rk6Zw-wQysDoA.png?1646058175)

If you do not have the "Add Material" button, it means there is no article in the Knowledge Base. Save the new course before proceeding.

## Adding Participants

Once you have saved the course, you can proceed to add participants.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641963/original/GK1l4a4vUy-nDcAIYsuSAr0GRFDPo5L-cQ.png?1646058175

Employees are added based on their positions rather than individually. For example, you can select "Sales Department Managers" in the position list, and all employees holding that position will appear in the list.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641967/original/pLqoSB0g92laAcPLdf-OI9aziqVyhoK-kQ.png?1646058177

If you need to add a large number of positions, you can make it easier for yourself by adding a general supervisor for those positions in the course and turning on the arrow switch. In this case, all subordinates of the supervisor will be added to the course.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641951/original/z6eqjlS34FqAuXWRXkcKSzB9-Bn5E1NEPg.png?1646058173

In our example, since the course is intended for all company employees, we will add the CEO with all their subordinates to the course. As a result, the course will include all project team members in the participant list.

## Course Settings

Once you have created the course, you can make it mandatory and set a deadline for completion:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641952/original/nLDdwukzWXqIfiCu9ZoRFj54L5MSJDqxHg.png?1646058175

Calendar days are counted, not just working days. Weekends are also considered for completion.

The user's dashboard will display a notification indicating that there is an unfinished mandatory course:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003641954/original/G8AAHbyRzdBcBwEI1VebMTxwVI2qyHr\_zA.png?1646058175

If an employee fails to complete a mandatory course on time, their metrics will be blocked. The notification on their dashboard and their manager's dashboard will turn red, indicating that there are overdue mandatory courses.

Once an employee submits the mandatory course for review, the metrics will become available again.

If the course is not passed correctly, the metrics will be blocked again.

# Adding Participants and Trainers

## Adding Participants and Trainers to a Course

To add a participant, go to Course Management for the desired course and select "Participants".

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003642053/original/7QDkeO4Oj4tqPTpev5ZhP-bJhzfpDSM\_jg.png?1646058248

Alternatively, open the course and navigate to the "Participants" tab. On the opened page, select the positions for which the course will be available.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003642055/original/tYZ29mSwc-KTAqDd3mFdedS1778Far6Yxg.png?1646058248

You can also include all subordinates of the selected position by clicking on the special icon: After adding the positions, all corresponding employees will appear in the participant list. The course will now be available to them in the course list (on the main Academy page).

Participants of the course do not have access to the list of other participants, so only the academy administrator or the trainer of the course can see the progress of all learners.

To assign a specific participant as a course trainer, you need to select the corresponding item in the drop-down menu:

[Image Link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003642056/original/zlDHdbujC80iGSOpEf7ave76w4YqajyHsQ.png?1646058248)

The course trainer will not take the course, but will be able to check the participants' exams. Each time a participant completes an exam, the trainer will receive a notification indicating who and in which course wrote the exam, as well as a link to the participants page:

[Image Link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003642052/original/XMZpxNyI17K1-0c0DhoQdhYSo0fln2Ohmw.png?1646058247)

Notifications are only sent when answering open questions that require the trainer's review. If a participant answers a closed question, whether it is an exam or not, no notification will be sent.

Information about incomplete courses and unfinished mandatory courses will be visible on the employee's and their supervisor's dashboard:

[Image Link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003642049/original/KUQs8T-qmZaHusrYxdWONa-wQYapcDX1gA.png?1646058246)

# Exams

## Exam

When an employee completes all the steps with course materials and tests, they will reach the step with the exam. The exam contains all the exam questions. These questions, like the others, are related to specific articles but are not displayed in the test steps.

The employee fills in the answers and clicks the continue button, after which the course enters a waiting state for the trainer's review.

[Image Link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003642109/original/Fm-IavmN1RzDHutYcjiQEeDIW\_hQKIZIiw.png?1646058289)

After the trainer reviews the exam, it either becomes passed or requires a retake. When a learner accesses the course with an exam that requires a retake, they will see which questions they answered incorrectly and can read the trainer's comments.

[Image Link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003642112/original/7fxjiUqb5WdoJEsQActwiOEogtzcPnrISw.png?1646058289)

By clicking the "Retake" button, the employee can answer the incorrectly answered question again.

This process will repeat until the trainer marks all the questions as resolved. After that, the exam is considered passed and the employee completes the course.

## Exam Review by Trainer

Trainers will have a button to initiate the review in the list of participants who have completed the exam:

[Image Link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003642110/original/9XKwQLUlflSm-AOZ7Aa6tfau5ApLToWeMg.png?1646058289)

Clicking the button will open the review window, where the trainer can see the participant's questions and answers. If marking an answer as incorrect, a comment can be provided to guide the employee in the right direction:

[Image Link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003642111/original/p97w1hyVuwtwqI\_nNFNQfLT5lZuXqmMQXg.png?1646058289)

## Course Lock Settings

In the project settings section of the Academy -> Academy Settings, you can specify the duration of the course lock (in minutes) for incorrect test answers. During this time, the materials located before the failed test will be accessible to the employee (so that they can review them), but the test itself will not be available. After this time period, the test will become available again, and the employee can continue the course.

If a test has multiple questions, and an employee answers only one question incorrectly, they will not know which question it was. Therefore, when retaking the test, they will need to answer all the questions again. This ensures that the employee knows the answers to all the questions and is familiar with the material, rather than simply guessing the answer the first time.

# Automated Knowledge Control

With this tool, you can automate the assessment of knowledge of regulations among your employees and ensure that every employee remembers every process relevant to their work.

## How Automated Knowledge Control Works

The essence of this tool is that for employees who have completed courses in the academy at certain intervals, a new course is automatically generated, containing a few questions from each previously completed course. The goal of this course is to refresh the employee's knowledge of previously covered material. Only closed-ended questions with answer options are included in the course. As a result, there is no need for administrator or trainer verification, as the course is automatically assessed.

The questions in the course are randomly ordered and not linked to specific materials (as in a regular course). This implementation further ensures that the employee truly knows the material and has not simply memorized it from the previous time.

Only closed-ended questions from tests are included in the course with automated knowledge control. Closed-ended questions from exams require trainer verification and cannot be automatically assessed.

## Automated Knowledge Control Settings

By default, automated knowledge control is disabled. You can enable and configure it in the Settings -> Academy -> Automated Knowledge Control section.

### Departments Excluded from Control

By default, courses are not assigned to employees who have not completed any courses in the Academy. Therefore, you do not need to specify them in this field.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003642483/original/vCMWu\_\_FogjddF1jLjuulQOuqV\_kuYtFJQ.png?1646058539)

This setting prevents the automatic course generation for positions that undergo training in the academy but, for some reason, do not participate in automated knowledge control. For example, all members of the board of directors take a one-time certification exam in the academy, but you do not want to bother them with periodic knowledge reviews.

If an entire department or division should not participate in the control, you can activate the "Accessible to Subordinates of the Position" button for the relevant manager in this field, and all subordinates of that employee will not participate in automated knowledge control.

### Maximum number of questions

Allows limiting the number of questions that will be included in an automatic course. This is useful for cases when an employee has completed a very large number of courses over time, so that they are not assigned, for example, 100 questions at once.

### Create a course every \_ days

A field that specifies the frequency of the course. The first course will be created within an hour from the moment the setting is enabled. All subsequent courses will be created at the interval of days specified in this field.

# Academy Report

The academy has a separate tool for tracking employees' progress in courses. You can find it in the upper right corner of the menu:

[Academy Report](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73008950163/original/s5m5e50G2ukeltdZ70gmQtN-RrIUVE8SUA.png?1651849162)

Here you can use filters and groupings to find all the necessary information, such as a report on all courses. To do this, you need to filter without grouping:

## Participant Report

You can also check the progress of each individual participant by grouping them:

[Participant Report](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73008950167/original/UQNevhE-moXu-SDzaW9aWEnkPmXNi353-Q.png?1651849163)

Color indicators help visually distinguish who is doing better and who is not. The gradations are as follows:

- Red: No courses completed

- Yellow: At least one course completed

- Green: All courses completed

The color indicators in the number of courses help understand the percentage of completion of each course:

[Color Indicators](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73008950162/original/9RKrUS2oprmUvKrE35rok4Qz\_FqO0N-TRw.png?1651849161)

Gradations are as follows:

- Red: Less than 25% completed

- Yellow: 25% to 75% completed

- Blue: 75% to 99% completed

- Green: 100% completed

## Error Report

By grouping by errors, you can see which user made mistakes in which course:

[Error Report](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73008950174/original/hBkaG0W1ZO-dxxsmqC6E7ObZKYQTd-ePDg.png?1651849164)

By clicking on the course name, you can see which questions the employee made mistakes in and how many times.

## Access

Only the following users have access to the Reports section:

- Project Administrator

- Trainer - they only have access to information about courses they are assigned to as trainers

- Academy Administrator

# Academy Settings

Academy settings can be found in the general settings. Here you can configure the overall rules of the academy's operation.

![Academy Settings](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003642650/original/vC-4hwB0Q7s3JsaUijhOnx6\_oBIJcU57\_A.png?1646058659)

## Course Lock Duration, minutes

A course is locked if an employee answers a test question incorrectly. This is done to prevent employees from guessing the correct answer by trial and error and encourage them to review the article material.

When a mistake is made, the employee is shown a notification indicating the duration of the course lock. Until the course is unlocked, the employee is encouraged to review the corresponding article again:

![Course Lock Notification](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003642652/original/nbPSOCodDIvWno8R3R\_1Vr2QjG\_I7BW6hw.png?1646058660)

When the employee closes the notification window, the system returns them to the material preceding the questions, initiates a countdown timer, and locks the "Continue" button:

![Course Lock Countdown](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003642653/original/VNos2qYLVAUyGXXAk-JFg7ed5qV3-zQAaQ.png?1646058661)

By default, the lock duration is set to 15 minutes. You can change this time as desired.

## Do Not Repeat Answered Questions

When this option is activated, if an employee makes a mistake in a question related to the material, they will only be asked to answer that specific question.

This can be useful when there are many questions related to the material, and if an employee makes a mistake, they would have to spend a lot of time answering them all again.

## Remind to Update Tests When Article Is Changed

When this option is enabled, every time an editor makes changes to an article, they will be prompted to add new questions related to the material to ensure that employees are aware of and reread the updated guidelines.

In the "Number of added words in the article to trigger the reminder" field, you can specify the condition for displaying the reminder. By default, it is set to 5 words. This means that if you add 5 or more words to the article, a reminder will be shown when you attempt to save the article.

When a new question is added to an article, employees who have previously completed the course will be required to read the updated material and answer the new question. If the question is not added, the course will not be updated, and you will have to manually notify employees of the changes. Therefore, we recommend always adding questions for any changes made to articles to automate the training of your employees and avoid manual work.

## Prohibit making changes to articles without adding tests

The mechanics of this setting are similar to the previous one, with the difference that this active setting will not allow saving the article until new questions are added to it.

Therefore, below you can specify at what number of added words the saving without adding tests will be blocked.

# Learning Programs

## Introduction

Learning programs are designed to systematize the completion of courses by subordinates.

[link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73023387999/original/y8ObPTEilN5DdAgXarLOiCKM\_pwROo899A.png?1662561281)

For example, you may want your employees to take courses in a specific sequence - you can set up program completion in such a way that employees cannot start the next course until they have completed the previous one.

Or your courses are divided into different topics, and you need to sort the courses by topics, such as "Sales," "Promotion," etc. - learning programs will also help you with this.

## Getting Started

At the very beginning, all the courses that you have created before will be located in "Courses without Programs."

[link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73023388060/original/BLhEArTU1ydWs\_MTknd79CZRePeZaUb8og.png?1662561314)

## Creating a program

You can create a program through the corresponding button:

[link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73023382144/original/W-QMCw8vPvk0\_S\_B4hpHvbkPVU0TG\_i9og.png?1662559281)

In the menu that appears, there are fields:

### Program Name

[link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73023383660/original/h83urYzgvnKjAi5bCpCYpP1UDL8oJibK-A.png?1662559805)

The name will be displayed in the program header:

[link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73023383890/original/Q4Axhv\_CiCy8LAGb95mN0fezSU7Sk7Qwrw.png?1662559875)

This field is required.

### Description

This field is intended for a brief description of the program, so that those taking it understand the essence of what they are taking:

[link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73023384488/original/NbU7Tzeh8kAFdTShUTD2iEwFJ2CxvsP9fw.png?1662560094)

The description will be displayed as text below the program header:

[link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73023384908/original/BweWQ\_HOiod7bH2o0KQ2rAtDrjgjcvUcEw.png?1662560217)

### Program Cover

This is a demo image of the program that can characterize the essence of the course:

[link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73023385267/original/OSi4ilVfzX2mtARWXQ262h0aCj4yekb78g.png?1662560340)

You can upload files of the following formats as a cover: .jpg, .png, .svg:

[link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73023385522/original/UyN1n1pXWt1YhFXrtcKNAcv0ZBdTBOpDVw.png?1662560448)

### Program courses

Courses can be added to the program through this field:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73023388663/original/gAKi-pvkjowpcqUgbh3lUSwa1qYTyTIrdg.png?1662561577

Courses can also be added to the program by dragging and dropping them into the desired program in the left menu:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73023388973/original/IFWJyAealj99QWug1MRg6f3yJx0ceRQWsQ.png?1662561699

### Drafts

All programs are initially created as drafts. To remove them from this status, the corresponding checkbox needs to be unchecked:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73023389235/original/M4GMv8-96I7mjMUvVlzm6ZyRK27MtJlnWw.png?1662561802

If a program is a draft, it will be displayed with reduced opacity in the general list of programs and will have the corresponding status:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73023389343/original/IGoFidY9EM\_\_6IUeZ3f5FS949Z4i2LqCxQ.png?1662561848

Once the "Draft" status is removed in the settings, it will become available to all employees added to it.

### Participant positions

This field is used to select the positions of employees who will have access to the program:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73023389834/original/9UWKFnx13uhV3mmtk-F\_ZAOOQHlRdzedJQ.png?1662562037

### Mandatory completion

This is a special setting that makes program completion mandatory for selected employees:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73023390217/original/GzobZHJNU8MjgVA9GssyxOMmuGd-A3ZJ6g.png?1662562171

If the setting is active, employees who miss the program completion deadlines will have their metrics blocked. You can configure the time after which metrics will be blocked for employees in the "Completion Deadline" field in the program settings.

Mandatory programs have a corresponding status. Employees can track the time remaining until their metrics are blocked using the program timer:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73023390505/original/XwiZ9XMSk5pYQR8k62GplG1Ge6WhDLYt2g.png?1662562272

### Do not open the next course until the previous one is completed

This setting allows for sequential course completion. For example, you may want employees to complete courses linearly.

When this setting is active, all subsequent courses will be blocked for employees until the courses that come before them are completed:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73023391986/original/BTjr8FEy2Y8MpK8teoTzhmA\_4f4RdmKPtQ.png?1662562792

# How Tasks are Organized in Platrum

Platrum offers a wide range of functionality, including task creation and management of multiple independent boards.

## Creating a Task

To create a task, click on the blue "Add" button in the top right corner. A task creation window will appear:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003643127/original/saIICW5IEag4CwlBV2C0KGnO9roaMbAoQg.png?1646058980

To create a task, simply fill in the "Task Name" field (if the mandatory field has not been added before).

You can then fill in additional fields:

- Task name - a mandatory field, without which a task cannot be created (It will be pre-filled after creating a task through the mini-window). If the field is cleared in an already created task and an attempt is made to save it, it will not be possible to do so, and the task will revert to the last saved name.

- Description - a field where the essence of the task can be described in more detail.

- Tags - created and assigned to tasks for easier categorization and searching in the overall task list.

- Creator - by default, the creator is specified as yourself, but another employee can be chosen.

- Assignee - by default, the creator is specified as the assignee, but another employee can be chosen.

- Observer - an employee who acts as an observer for the task.

- Category - assigned to the task for easier sorting or separation.

- Position - the position of the responsible employee for the task.

- Board - the board where the task is located.

- Deadlines - deadlines can be set for task completion. In this case, if the task is on a board, it will turn red if the deadline is missed.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003643166/original/f4ARn5JYBH1oxCFJuCNbWwhtELNNqA3MFg.png?1646059007

Once a task is created, it will appear in your task list as well as in the list of plans.

Tasks can also be quickly created in panels such as the queue in plans or columns on boards. In this case, it is sufficient to enter only the task name and save by pressing Enter.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003643223/original/xiO9rUhe4steiv-Lu\_px6NKVf\_LraQnzWw.png?1646059023

## Task Card

By clicking on a task, a card with information about the task will open, presenting the minimum necessary information. More detailed work with the task is done in the expanded card. It can be opened by clicking on the pencil.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003643186/original/BGc6eNbXoYRwc6fppSql95b-VRHearcJ8w.png?1646059011

If you want the expanded card to open immediately, you can choose this option when it is first offered by the system.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003643144/original/HOnENONUf2WLsSLf5SXWH36TktH0q3l56g.png?1646058992

You can later change this setting in the general project settings if needed.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003643163/original/Y-4vKgOkoGcqnwH\_w8Kl8W4iI7x2D93axA.png?1646059006

### What's in the expanded card

The expanded card provides more detailed information about the task:

- Fields (described here).

- Additional actions for configuring the task.

- Action history and comments.

In an already created task, the assignee and the creator can leave comments and reply to each other. The owner and an employee with "Task Administration" access can also leave comments. To leave a comment, type the text and press Ctrl+Enter. You can delete or edit a comment. An edited comment will have a corresponding label.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003643175/original/njH6NlniECx1Mh85TniC2ynTu87ZMWr2PQ.png?1646059008

To reply to a comment, click on the arrow icon.

All comments will be displayed in the task as a comment feed. Comments that are replies to other comments will have a corresponding note.

### Task columns

Columns contain tasks that you have placed in them. Columns can serve different purposes, for example, if you need a task to go through multiple stages of review, the task moves between columns, passing through these review stages. Once a task is in the next column, it means that the preceding review stage has been completed.

To create a column, click on the "Add another list" button:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003643162/original/1MaXscpxlM3a1p090cbPBGCQLqP8OIJ2jg.png?1646059005

Columns have their own settings:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003643176/original/utBdvemQm2pPJOCqpzSdBGOlvcnbNzaoWw.png?1646059008

Column settings:

- Column Name - set by the user when creating the column.

- Grouping - groups the column based on selected parameters.

- Sorting - sorts the column based on selected parameters.

- List Color - allows you to specify a color for the column for easier visual distinction.

- Show - hides or shows the column.

- Hide completed tasks - hides tasks with a "Completed" status.

- Task Card Fields - list of fields to be displayed in the small task card.

### Grouping

Columns in boards can be grouped by:

- Status;

- Creator;

- Assignee;

- Category;

- Position;

- Panels (Columns);

- Tags.

To enable grouping, click here:

[Grouping](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003643170/original/dK6B20wBMGqTViocQVpgsHiPXLtQG9fjGQ.png?1646059008)

Each column in the board can be grouped separately.

### Sorting

Columns in boards can be sorted by:

- Status;

- Creator;

- Category;

- Position;

- Creation date;

- Start date;

- End date.

[Sorting](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003643179/original/ItiNQoNEwgYVMFOdIwSu5ZybwTWIPlsMww.png?1646059009)

Sorting can be reversed by clicking the corresponding button:

[Reverse sorting](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003643178/original/-1x8NWH0O1npsdu-Be1ohhSHaBWmmV7YBw.png?1646059009)

Each column in the boards is sorted separately.

### Favorites tasks

You can add a task to favorites by clicking on the star next to its title:

[Favorites tasks](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73013938845/original/rotNl0nAUh7HglPytVtSXhC7SX2rjyzYyA.png?1656066990)

You can conveniently filter these tasks using a separate filter. This way, you can quickly find the tasks you are interested in on the boards and in the general list.

### Custom fields

You can add your own fields to tasks, which employees will fill in. You can create them in "Field Settings":

[Custom fields](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003643184/original/1e02v3QWkmPwkwPDLmjj2Rvu1u8\_Zlx9QQ.png?1646059010)

For a custom field, you can specify the following settings:

- Name;

- Type:

--- String - any value can be entered;

--- List - you specify the list items from which the user will choose to populate the field;

--- Integer - only whole numbers;

--- Floating-point number - only its whole numbers;

--- Text - only text;

- Default value - a value that will be automatically pre-filled in the task;

- Hidden - a field that will be hidden when the task is first opened. To see it, hidden task fields must be expanded;

- Required - a field that must be filled in order to create a task;

- Inherit values - all tasks created by a checklist within the main task will inherit the value of this field;

- Additional settings:

--- Sorting - the higher the value, the higher the field will be in the task's field list;

--- System name - automatically given to the field (can be changed if desired), helps distinguish fields when multiple fields have the same name.

### Access Rights

To manage access rights to the board, you need to go to the corresponding menu:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003643180/original/PTjWU5tO8UoEjlUDZyyfTgVQ0nLhsvXbaA.png?1646059009

The access rights menu looks like this:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003643167/original/1dwV9oV-bqUKv9De6fziSyU9\_EO2vqPNDw.png?1646059007

In this menu, you can:

- Grant access to individual users;

- Grant access to positions.

The rights are divided as follows:

- Board view - the user will only have access to view the contents of the board;

- View + task creation - everything from the previous access level, plus the ability to create tasks;

- Board management - everything from the previous access levels, plus all other functions.

### What an ordinary employee sees

Employees who do not have access to board administration have some functions restricted:

- Column settings;

- Board settings;

- Creating tasks in someone else's checklist;

- Editing tasks that are not their own.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003643183/original/1lvlBLMj-5kn3pzP1hSPh-RNdJC6aYKEdg.png?1646059010

This employee can:

- View all tasks on the board

- Create new tasks

- Within their task, they have full access to configure them.

### What the manager sees

The manager has access to all the administrative functionality of the board, tasks, and columns on the board.

## Notifications

In the notification settings, you can configure the sending of notifications for the following actions:

You can configure where exactly you would like to receive notifications: by email or in the project, both for individual events and for the entire category at once. Notifications in the project are displayed in the notification center (the bell icon in the lower-left corner).

### Slack notifications

Platrum allows you to configure notifications in Slack. To do this, you need to find the Platrum extension in Slack:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003643146/original/MdB5ZBQVZd19cs9AGJ4UZ\_ByZV6ujWZuUg.png?1646058993

Then, in the project profile settings of Platrum, enter your Slack username:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003643168/original/QLWJirThroeLyReHBV0vDRmix-7va0Fraw.png?1646059007

Now, task notifications (and more) will be sent to you in Slack.

## Task categories

There are initially 4 categories created: Tasks, Projects, Recurring Actions, Training:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003643165/original/sE9lS300A4VvqOKeC\_hTQ7SjW955FHx2kA.png?1646059007

You can delete unnecessary categories and add your own, or edit the existing ones.

In the future, these categories will serve as one of the task parameters, which can be used to filter and group them in Plans.

This is an optional setting, and if you don't use categories, you can skip this and simply hide unnecessary categories in Plans.

## Task relationships

You can configure the relationship of each task with other tasks:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73013721154/original/3WgRbmr6hafeWRbz5igPScmxugrRw-X1MA.png?1655916529

For example:

The task "Write an article" is blocked by the task "Pay for the Knowledge Base license". By establishing a link of "Blocked by" between the tasks, it can be shown that the first task cannot be completed without the completion of the second task.

## Commenting

Comments can be left on tasks, and actions related to the task can be logged:

[Commenting Screenshot](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73013723656/original/WBCBmVZZY\_7b2OiwjnCE\_BuWHhJagCnbcA.png?1655917490)

Time spent on a task can be logged in comments. To do this, the amount of time spent should be specified before the comment text in the format: 1h (1 hour) or 2h (2 hours), etc.:

[Time Logging Screenshot](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73013723651/original/lzswbq7fcc8tKPzM4tHl1ZK6ZEOpwCu3iA.png?1655917489)

Such a comment will be added in the time logging format:

[Time Logging Comment Screenshot](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73013723657/original/N3gGi6LecznlNrYymVLBqPgDDlHU8Ajf2A.png?1655917489)

The specified value will also be added to the "Time Spent" field:

[Time Spent Field Screenshot](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73013723652/original/TedeI3ja3lmCC-AUE-RcC14\_VAnT-6zNqg.png?1655917489)

## Tag Administration

To create a tag, simply enter its name in the corresponding field and then click "Create Tag":

[Tag Creation Screenshot](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003643164/original/lb6caPbnBRk0jiv5upkInnH6r\_T793OnBQ.png?1646059007)

The tag will immediately be created and assigned to the current task, and it will also appear in the list of task tags, from which it can be easily assigned to a task by selecting it from the list. The tag color can also be switched immediately upon its creation (to make it visually distinguishable).

Tasks can have as many tags as desired, but it is recommended not to assign more than 4-5 tags, as otherwise the task cards will become unreadable.

Tags are also displayed in the task card (if enabled in the column settings). To view the full tag, simply click on it:

[Expanded Tag Screenshot](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003643145/original/p2sMFrh2wrVVNUE5ry3-Sd5sZWAVt01qvw.png?1646058992)

There is also a "Tag Administration" in the project settings:

[Tag Administration Screenshot](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003643169/original/OlhdEnCM5kmajIy\_vFo-ZISwMaOIi0J8Cw.png?1646059008)

Here, you can create tags, edit existing ones, and delete unnecessary ones.

# How to work with tasks in Platrum

To work with tasks, we have created several tools tailored to different processes:

- Boards - help organize team work on a project in one place

- Plans - allow you to focus on tasks by weeks and track their progress.

- Task Calendar (Home) - the main assistant in planning work, hence the name of the tool. Here, all tasks are collected in one place with a calendar, allowing for more detailed planning of working days, both your own and subordinates'.

Each of these tools will be discussed in detail in separate articles.

We recommend starting with learning about the task card and how you can customize it for yourself.

## What is included in a task

By default, a task opens in a small window displaying the title, description, assignee, and creator. To open the task in a larger window on the right side, click on the pencil icon.

In the larger task window, you can:

- Specify the title

- Add tags

- Add a description

- Set deadlines

- Enter planned and actual time

- Add followers

- Select a board

- Add information to additional fields

- Leave comments

## How to repeat a task

In addition to "one-time" tasks, you can set up the repetition of the same task with different frequencies. To do this:

- Set a deadline for the task

- Click on "Repeat Task"

- Choose how often you want it to repeat, every day, on working days, or once a week.

[Click here to see the screenshot](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003645131/original/b\_HcY9ieICXfrZ8rzrjfTnEqijK1KuQ-gA.png?1646060337)

The created tasks will automatically appear in your calendar on the Home page, as well as in Plans under the "Recurring Actions" group.

By making changes to one of the recurring tasks, you can choose to apply the change only to that task or to all. In the latter case, all future tasks starting from that point will be affected.

When completing a task, you will not see such a window. Only the task whose status you are changing will be closed.

## Task time tracking

In a task, you can specify the planned and actual amount of time spent on its execution. You can enter this information in the task fields, but you can also track the actual time using comments.

To do this, leave a comment in the following format:

2 h spent on the task

You can specify any number of hours and any text, the main thing is to indicate them in the correct order with the letter 'h' (either uppercase or lowercase).

## Additional actions

In the task, there is a hidden menu where you can:

- Clone the task. By cloning, you can save the clone identical to the original task, or make slight edits to the future task before saving.

- Make this task a subtask of another task. The parent task will have a checklist with a link to this task.

- Add a related task. Related tasks help understand the sequence of task execution.

- Customize fields. This setting determines which fields are displayed by default in the window and which are hidden. Hidden fields can be shown by clicking on the button with two arrows.

- Delete

[Image Link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003645310/original/4Ijz\_pM2t12UJH86QprfGHj95sC12GzAcA.png?1646060512)

## Task administration

Some actions are only available to a user with task administration access. A user with such access can:

- Edit and delete tags created by users

- Configure task categories

You can access these settings by clicking on the profile photo on the left, selecting "Settings", and then the "Tasks" section.

[Image Link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003645389/original/4b1owuSU66EtTxdn6kXnAir9uNGUyEwT8Q.png?1646060569)

# Home

## How it works

The Home page is the primary assistant for working with tasks.

All tasks from plans, boards, and calendars are collected here. The Home page contains several tabs, each for different types of work:

- "My Tasks" contains tasks in which you are the assignee;

- "Delegated Tasks" shows tasks in which you are the assigner or auditor;

- "Tracked Tasks" displays tasks that you are tracking by clicking on the three dots in the top right corner of the task and selecting "Track Task".

Within the task tabs, tasks are divided into statuses: "New", "In Progress", "Waiting for Review", "Completed", "Deferred".

You can change the status of a task by moving it between columns, by using the status button within the task itself, or by using the task completion/resumption button.

When moving a task between columns, you will be changing the status within the task itself.

You can move it to the "In Progress" column to change the status of the task to "In Progress" if it will require time, or directly to "Completed" if you have already completed it.

Overdue tasks will be prioritized and shown at the top of the list to always keep them in view.

## One-click task completion

The quick task completion/resume button is located to the left of the status selection. If you click on the task completion button, the task will automatically move to the "Completed" status and change columns to "Completed".

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73025652970/original/UMrgVTVWHeiw8FCltUs9lM\_AZNmrtdIJSA.png?1664289498)

If you click on the task resume button, the task will automatically move to the "New" status and change columns to "New". The task resume button is only available for tasks in the "Completed" status.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73025653007/original/6mRDx4jzsI7FdLn3-wvFv6Pvj8\_Xjggw9g.png?1664289508)

## Task verification

Delegated task results may require verification before closing. For such tasks, enable the mandatory verification setting so the task will not be closed until you or your assigned auditor verifies the result.

To enable verification, go to the task and enable the setting "Mandatory verification by the assignor or auditor".

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73024344461/original/Xbe1i-VkBXsJjdhfBd1M1rLnufOUnCt3jg.png?1663255897)

With verification enabled, the executor will only be able to move the task to the "New", "In progress", or "Waiting for verification" status.

If the task is moved to the "Waiting for verification" status, the task assignor or auditor can see it in the "Waiting for verification" column and can then close, return to work, or postpone the task.

If you often create tasks that require verification, you can enable the default setting "Create tasks with mandatory verification by default". This way, verification will be enabled in all new tasks, and you can disable it if needed.

To enable verification for all tasks, go to project settings, navigate to the "Custom settings" section, and enable "Create tasks with mandatory verification by default".

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73024345111/original/l\_JbrgQDwjMd35GqkfzSsRul8Nh02mQzlQ.png?1663256130)

## Task start page

The default main page opens first when entering the task section. If you want the Calendar or any other task tool to open immediately when entering Tasks, you can go to project settings, open the "Custom settings" tab, and select the desired task section in the "Start page of the section" field.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73024345701/original/xIRgO-xxP4g-cCBJhFl98jJ8fR1VYosS8w.png?1663256315)

# Boards

## About the tool

Boards are a way to organize team tasks for a common project. In boards, you can visually represent the process of task completion using columns, where each column represents a stage of working on a task.

[Board Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003645803/original/GE70i635qdGkchJtrspRxdwVTSmqfH8jHg.png?1646060899)

In Platrum, you can create an unlimited number of boards, both personal and team boards. You can switch between them at any time using a list, and the most frequently used ones can be added to favorites.

## Creating and configuring a board

Any employee in the project can create boards, regardless of their access permissions. You can create new boards from scratch every time you need to organize work on a new project, or pre-prepare several board templates with tasks and create new boards based on them.

### Adding custom fields to a board

All Platrum tasks have a specific set of default fields. However, in addition to them, you can create your own fields that are necessary for working with tasks.

To do this, you need to open the board settings by clicking on the gear icon and selecting "Field settings":

[Field Settings Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73013804117/original/\_sqPCiB3j9qpBT4JOIySDg4pjmfPIxsAFQ.png?1655980858)

A menu will appear on the right, where you can add your own field:

[Add Field Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73013804629/original/VDZxQUKFnXc6PiZdoBi5uB2s33C9xUBrTQ.png?1655981240)

Each field can have its own properties:

- Name - required

- Type - determines the content that should be in this field. For example, if you select "Number" as the type, you will not be able to enter text in the field. When selecting the "List" type, you will not be able to enter anything in the field, but only select from predefined values. You can set the list of values for the field in a field that appears when selecting this type.

- Default value - can be filled in if the field usually has the same value. For example, for the Priority field, you can select the default value as "Medium" if tasks with low and high priorities are exceptions.

- Hidden - if this property is set, the field will not be visible to employees working with the board, it will only be available to the board administrator. This can be useful if there is information that cannot be disclosed to employees, but is necessary for administration. For example, it could be the amount the performer will receive for completing a task or confidential information about the customer.

- Required - if a board has a required field, a task cannot be assigned to it without filling in that field.

- Inherit values - this is useful for working with checklists in tasks. All fields that inherit values will be automatically filled in checklists with the same value as specified in the parent task.

- Sorting - determines the order in which the field will be displayed in the task card. The smaller the number, the higher the task will be in the list.

- The system name is used to identify this field and is generated automatically, usually requiring no changes.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73013806046/original/Q2RzWsu4hFuB-FUT8vkCTmKr\_9be1gyaqg.png?1655982181

Fields can be created for each board separately. For example, legal and accounting boards will have their unique set of fields specific to the activities of each department.

If there are common fields applicable to all boards, such as task priority, they can be reused. When creating a new field, simply start entering the name and you will be prompted to choose from existing fields with the same name:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73013806306/original/0wTm8KibxhR\_9YKwApPxXj-T8Amh1WnbVw.png?1655982373

### Inviting participants and setting up access

To grant access to a board, open the board settings and select "Manage Access"

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73013809053/original/ZWhw6i4IFAXZlsazgdECsBMgPVZ1e\_dTRQ.png?1655984015

Once the board is created, it will be accessible to all supervisors in your vertical, as well as employees with "Administer All Tasks" access.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73013810006/original/bf\_BPaCu-2kKScYmvgDXuGp\_D09gWFg79w.png?1655984465

These are system access rights that cannot be changed or edited. They will only change with changes in the organizational structure. It is not possible to make a completely private board in Platrum, as it is intended to be a workspace and part of the company's infrastructure, and supervisors should understand the work being done by subordinates.

Roles serve as a hint to the board creator about who the employee is in relation to the board, to understand why they have access to it:

- Administrator: the project owner and employees with "Task Administration" access.

- Owner's Supervisor: an employee who holds a higher position within the same vertical as the board owner.

- Owner: the person who created the board, there can only be one.

In addition to system access, you can also grant access to other project employees. Access can be granted in two ways:

- Specific employee: in this case, when they leave the company, the next employee in the same position will no longer have access to the board.

- Position-based: in this case, regardless of who fills the position, they will always have access to the board. With this type of access, you can choose to grant access to all subordinates of that position as well.

(https://secure.helpscout.net/docs/5e70b5062c7d3a7e9ae94a29/article/5f4f6db92c7d3a352e91b044/#manage)

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73013810682/original/hDKKXAY8-wxsKxdie3it2mWhVbfHOMtXUw.png?1655984826

Access levels can be as follows:

- View board: employees can only see tasks but cannot edit or move them between columns.

- View + create tasks: employees can create tasks, view tasks of all board members, and edit only the tasks they created.

- Board work: allows viewing and editing of all tasks on the board, but does not provide access to board settings.

### Creating a board from a template

Each employee added to the project can create their own boards and templates. In the current version, templates are only available to their creator. In the future, templates will be enhanced to allow for customized access settings.

You can create a new template from the list of boards:

[Image Link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73013801867/original/pgoXuOeFDeTaZjwEZ-6rxgkkiUmw0Hm3bw.png?1655979406)

Currently, you cannot create a template based on an existing board; it needs to be filled from scratch. In the future, boards will be enhanced to allow for creating templates based on existing boards.

All created templates will be located in the same list of boards under the "Templates" group.

[Image Link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73013802115/original/DpkGP-mH78gwyMCYAwtAgbufgb2qJ0gvVA.png?1655979618)

All task cards in templates are not real tasks and will not be visible to employees or appear in the task list when filtered. Task cards from templates will become real tasks when a board is created based on the template.

Once you have at least one template, you can select a template when creating a board and populate it accordingly.

## How board work is structured

On the board, you can visualize the process of moving tasks through different stages of work. Each column on the board represents a work stage.

By moving a task card from one list to another, you indicate its transition from one stage to another. This allows you to quickly assess the overall progress in the process and identify bottlenecks, as all stages are visually displayed in one place.

### Column settings

Board columns are panels that group different tasks. Each column has its own name, can be sorted and grouped differently, and has its own color.

[Image Link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73013816698/original/xUudDAUaeYuY6kAu4sVAFHqKa0Xcf7iGvQ.png?1655987166)

To configure a column, click on the ellipsis button on the right edge of the column:

[Image Link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003645802/original/CBTd2AdcD5Ka69puu8VL4x8QCGuiHBpIhA.png?1646060899)

In the settings, you can change:

- Column name

- Grouping - in this case, tasks are divided into blocks within the list depending on the grouping type

- Sorting - the order of all tasks within the list

- Color - can be chosen from presets or specified individually

- Show or hide - allows hiding irrelevant lists. Unlike deletion, it can be restored in the future

- Task card fields - determines how the task will be displayed inside the list

Any list can be hidden from the board by toggling the "Show" checkbox to the inactive state. To restore it, the "Show hidden" switch can be enabled in the board settings.

### Working with Tasks and Columns

The main principle of working with tasks in lists is to easily move them from one list to another for better perception of the task status or its resolution stage. The transfer works on the principle of drag and drop (drag with the mouse and move).

Using the same principle, the lists themselves can be rearranged.

[Image Link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003645816/original/IklQ8qWNdFAgpExTcKOhNkpf2\_GUzPMpYA.png?1646060903)

In any list, you can open a task card in a popup window and edit it:

- Change the name

- Add a description

- Set due dates

- Mark as completed

- Delete

[Image Link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003645812/original/ecZ4ug6jj\_5kVUQYPSpca\_LBTSH-OJcncA.png?1646060902)

If you need to leave a comment on a task or view it in more detail, you can open the task edit window by clicking on the pencil icon in the popup window. In addition to the above, you will be able to:

- Describe the product

- Change the assignee

- Specify a category

- Indicate the planned and actual time for task completion

- Leave a comment

- Clone the task

(https://secure.helpscout.net/docs/5e70b5062c7d3a7e9ae94a29/article/5f4f6db92c7d3a352e91b044/#manage)

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003645814/original/izmAoB3zF\_Mhv6j4MBk5b0BzXkS8UJTl0A.png?1646060902

## FAQ

Here are frequently asked questions from customers and their answers:

Is there a board in tasks, with multiple people working on it, what will happen if the owner (creator) of the board is fired?

When the owner of the board is fired (removed from the project), the board will remain, and the administrators of the board, the manager of the board owner, or the project owner will still have access to it.

# Plans

## About the Tool

Plans is a tool for weekly planning of your work and task delegation.

With this tool, you can conveniently plan your activities, as well as monitor the tasks and goals of your subordinates.

Often, as a manager, you may encounter situations where you are not fully aware of what a particular employee is focused on at the moment and whether this focus aligns with your priorities. Typically, different task management channels (task trackers, corporate messengers, workgroups, and personal meetings) are used, which inevitably creates chaos in process management and hinders goal achievement.

The idea of the tool is that you can create and document plans for each work week in one place. Here, you can quickly compose a plan for yourself or your subordinate by adding the most important tasks from the task queue.

At the same time, you will never lose any ideas or tasks "for later" because they will always be in front of you in the task queue.

## Access

Plans are available to all employees. Each employee can add tasks to the plans that need to be completed within the week.

Managers have access to the plans of their direct subordinates.

The owner, as well as an employee with "Administration of all tasks" access, can see the plans of all employees, including those who have been removed.

## How it works

Tasks from the Tasks list are added to the Plans queue.

Tasks from Boards can be added to Plans by selecting the relevant boards in the Plans settings. You can also display a list of tasks from other employees' boards to which you have access by adding such boards to Favorites.

On the Plans page, you will find:

### Filters

In the filters, you can:

- Customize the display of plans by selecting the positions (if you hold multiple positions in the organization), task categories, and task fields that should be shown.

[Filter Example](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003646031/original/PkUutQuacjKNF1iqZpJIoBSzuvpCnUMR0g.png?1646061037)

- Select an employee whose weekly plan needs to be reviewed (including plans of terminated employees).

[Employee Selection Example](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003646026/original/JAMQxVrYD-lLnQPi4oIlO8fai44CByV6Qw.png?1646061037)

- Choose a period - the default is the current period. The dropdown list includes the current plan date plus the previous 5 weeks and the following 5 weeks. If you need to view older data, you can switch to the previous period by clicking the arrow, which will make an additional 5 weeks available in the dropdown list.

All tasks in the plans can be grouped by tags (if tags are assigned to the tasks). Tasks without tags will be placed in the corresponding group.

[Grouping Example](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003646034/original/8ZxJo1IjmmYxcc-H5qnE2RnHfZg6Id4bRA.png?1646061038)

In addition to the filters, there is a "Copy Tasks" button. Clicking this button will copy the task data to the clipboard in CSV format, allowing you to add them to a table.

### Plans

The plan table consists of task categories on the vertical axis and task fields on the horizontal axis (as mentioned earlier, the display of fields and categories can be customized in the Display Settings for plans).

[Plan Example](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003646029/original/VApaqo1cAsic1O7MdU6LNeuleyCTOTzbFQ.png?1646061037)

You may have multiple plans on your dashboard if you hold multiple positions in the company. In this case, the assignment of a task to a specific plan depends on your primary position. You can change your primary position in your employee profile. If you need a specific task to be assigned to a different plan, you can change the position within the task itself.

[Task Assignment Example](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73011272187/original/14vRfbrHst0zN5kgeIm9xw7WVrDBGyaTVg.png?1654068214)

Tasks can be created within the plan itself. To do this, enter the task name in the "Add New" field and press Enter.

Overdue tasks from previous plans are highlighted in red, while completed tasks are highlighted in green. A task is considered overdue if the period in which it was supposed to be completed has passed and the task has not been marked as completed.

Furthermore, unfinished tasks are automatically added to your task queue to prevent them from being lost when creating plans for a new week. If a task has remained incomplete across multiple plans, it will be indicated by dots below it, representing the number of plans in which the task appeared. This will help prioritize which tasks should be worked on first.

### Task Lists in Plans

Different task lists are displayed to the right of the plans, which can be used to work with tasks within the plans. To move a task into a plan or out of a plan, simply click on the corresponding button. Tasks that are removed from a plan will be added to the task queue.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003646033/original/S6NVvqisMu4aGYDqiyREKxYd-nPhqwXPYA.png?1646061038

### Task Queue

Tasks are automatically added to this list if you are the assigned executor and no deadline is specified. You can also manually add tasks to the queue for later distribution.

If a task was added to a plan but not completed on time, it will return to the queue and be marked with a red dot.

By default, tasks are displayed in a single list, but you can configure task grouping and sorting settings to arrange tasks in a specific order. In the same window, you can choose which task fields will be displayed in this panel.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003646032/original/f-IV8JaN5kuuZSajWywTVgj1Oh0UGDf0uQ.png?1646061038

### Subordinates' tasks

This list will include tasks of all your direct subordinates. These tasks can also be transferred to your own plan so that you can monitor their progress without opening the employee's plan. Tasks in this list can also be grouped and sorted by different fields.

### Audited tasks

This list includes tasks of other employees where you are listed as an auditor. An auditor cannot edit the task, but can leave comments and will receive notifications about changes to the task.

### Board tasks

If you specify in the settings from which boards tasks should be displayed in the plans, then a separate list will appear for each board. In these lists, tasks will be grouped by default according to the list they are in on that board. This type of grouping is called "Panel". You can change it to another convenient option, but then it will not be clear how these tasks are arranged on the board relative to each other.

# Calendar

## What is the Calendar for

The Calendar is the main assistant in working with tasks.

The idea of the page is that here you can see all the data related to your tasks on one screen:

- all incoming tasks that you can immediately put in the calendar or in future plans;

- all tasks assigned to your subordinates;

- tasks from multiple boards at the same time.

## What is on the page

On the left side of the page is the Tasks Calendar, and on the right are various panels with task lists.

[Visualization of the Tasks Calendar and panels](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73026281465/original/uTB1R4gIoyQXSm\_AoyQlPzbmp5oX94VORg.png?1664784289)

You can drag tasks from the panels into the calendar, as well as between each other.

## Calendar

The Calendar serves as a daily task scheduler.

By dragging a task into the Calendar, you set its deadline, and vice versa - by setting a deadline in the task, it will automatically occupy the corresponding cell in the Calendar. To remove a task from the Calendar, you need to delete the deadline.

If a task does not have a clear deadline, but it must be done on a specific day, you can add a "One Day" task. This is relevant for both a single day and multiple days (for example, if you have 3 days to complete a background task).

If a task is assigned with a deadline by a superior to a subordinate, the subordinate will be able to modify the deadline. The assignor will receive a notification of the deadline change in the task.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73026281745/original/C0FJzcu5QR3VUWWfYvvr4xV1B-nlKt6T-Q.png?1664784421

The time in the calendar adjusts according to your device's time zone. If employees work in different time zones, they will see tasks in the calendar based on their time zone.

### Appearance

The calendar has 2 display modes:

- 7-day, where the calendar shows the days of the current week

- 1-day, where only today's date is displayed

You can adjust the width of the calendar by stretching or narrowing it on the page. This is available in either mode.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73026282006/original/WTWHcw9wI4N7tNpPMWszImnpY3UH3AczAA.png?1664784535

### Scheduling Meetings

You can schedule a meeting with any employee in the project. If an employee does not have access to task administration, they will not be able to see other employees' tasks in the calendar. The ability to schedule meetings is available by default to all project employees.

To schedule a meeting, go to "Calendar" and select the desired employee at the top:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73037409463/original/tLwocP8J6BlyR\_vz7-2POGX3fHuxIvOXrw.png?1672304949

After the selection, you will be in the calendar view for the selected employee. Click on the icon at the top:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73037409639/original/t6LqMHKPEP\_1Y35TfMpv5GhQHnh4dVaRtg.png?1672305058

This will display a grid in the calendar, where you can see both your and the employee's occupied time slots, allowing you to schedule a meeting in an available slot.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73037409952/original/lQQm5wfZt7HC8ibjaQieTNEkd8T1xX6jWg.png?1672305291

To view all tasks in the calendar again, if you have access to them, click on the meeting scheduling completion icon:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73037410132/original/n12aC1XWwUMAbCpx9D94zHDHqe3C0rkfYQ.png?1672305419

The meeting is displayed in the calendar similar to other tasks:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73037410351/original/yNC\_V36elFWmoaJhmCnFGPczzWLJ4WOWuQ.png?1672305636

### Recurring Tasks

Any task can be made recurring. In this case, the same task will be automatically created on the specified interval on the specified days.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73026282146/original/nUD9LZk-7Ro2HXRyH4fDyK3X4Z-uWqiyqA.png?1664784625

You can set the following recurrences:

- Daily

- Daily on weekdays

- Weekly

- Monthly

- Annually

When making changes to one of the recurring tasks, you can choose to apply the changes to all instances or only to the current task. Completing one recurring task will only mark the current instance as completed, while leaving the rest unchanged. You don't have to create a new task template every time.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73018928122/original/X\_\_sq1ED2IOuiPqOQWMcnbIBZ2M-HQUXXA.png?1659545848

Recurring tasks are automatically added to the plan according to their due dates, and they are grouped separately under "Recurring Tasks". You can remove them from the plan by erasing their due dates.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003646184/original/Y1qCW4GtuqgGqIh\_VNXfLSAyyzZ3ytGn9w.png?1646061116

### Sync with Google Calendar

You can set up synchronization in the settings section - Tasks - Integration with Google Calendar. You can also quickly access it from the "Calendar" page by clicking on the gear icon.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003646181/original/GREowCRCJnNTjpfpxgKOMx2UtqmVf5fD9w.png?1646061114

When setting up, you can create a new calendar named Platrum or select one of the existing calendars from the list.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003646185/original/QhUuRJBREv\_CQwhbv8e325mXoChUPshVOw.png?1646061116

Task synchronization with Google Calendar is bidirectional. To display a task in Platrum, you need to create an "Event" in Google Calendar and select the calendar that you specified during the integration with Google Calendar in Platrum.

## Task Lists

To the right of the calendar, you will find task lists. Each of them has its own function in the calendar, which we will explain below.

### Queue

The queue displays all tasks where you are the assignee. These can be tasks that you have assigned to yourself or tasks assigned to you by another employee.

Tasks with a deadline are automatically displayed in the calendar and are not duplicated in the queue. However, if you fail to complete a task by the deadline, it will be displayed in red text both in the calendar and in the queue. This allows you to easily identify tasks with missed deadlines.

[Queue screenshot](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003646183/original/\_peODmYYhndbZB1cdMOXFntUcHz7bP6xhA.png?1646061115)

### Assignments

Assignments are tasks assigned by you to other employees.

Assignments can be:

- Due - scheduled for a specific time

- Without deadlines - without a specific deadline

- Completed - tasks that your subordinates have already completed.

By default, these panels are grouped by assignee, making it easier to see which tasks belong to each person.

When you move a task between groups, the assignee of the task will change accordingly. Therefore, if you want to assign a task from your queue to one of your subordinates, you can simply move it to the group of tasks assigned to that person.

If there are no tasks in this panel yet, you will need to specify the assignee when creating a task - the task will automatically appear in this panel, creating a group of tasks for that employee.

[Assignments screenshot](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003646188/original/Dv9RJv3IgAjpoRZ3Tk7Na9bhwq6wwNKnGA.png?1646061117)

When you move a task from the "Without Deadlines" panel to the "Due" panel, the task will automatically be assigned a deadline - the nearest hour. Similarly, if you set your own deadline for such a task, it will also change the panel.

When you move a task from the "Due" panel to the "Without Deadlines" panel, the deadline for the task will be removed.

### Board Tasks

Each panel corresponds to a task board. By default, the grouping in these panels is based on the columns of the board. Any changes in this panel are automatically applied to the board.

To add a list of tasks from a specific board to the Calendar, you need to add that board to Favorites in the boards section.

[Board Tasks screenshot](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003646182/original/QD5kH6ZrHSAzu82PGxjvTNRBz\_Kgw3atMA.png?1646061115)

Board tasks in the Calendar will be displayed as a single list. They will be grouped by board columns by default, and this grouping cannot be changed.

### Completed

Tasks are automatically added to this task panel once you change their status from "New" to "Completed".

## Page Access

Every employee in the project has the ability to work with tasks in the calendar. Employees who have subordinates can choose to view their subordinate's calendar.

# Task List

## About the Tool

The "Tasks" tab is one of the components of the "Tasks" tool and represents a list of all tasks available to the user. This page is useful for reporting on tasks or quickly finding specific tasks based on given parameters.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003646286/original/N8OZvfyfccuRI2XAvqbFNnncAdJpxupvDQ.png?1646061196)

## Accessible to

The task list tab is accessible to all employees. An employee with basic access can assign a task to themselves or any other employee in the company.

On the tasks page, the employee will see tasks that are:

- Assigned to them

- Assigned to others

- Assigned to their subordinates

The exception to this mechanism is the Project Owner and employees with Administer All Tasks access.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003646284/original/jsJZCnfaRnBFNq5U6BNmaKoSyWOef0-FBA.png?1646061195)

Such employees can view and edit/delete all tasks and also assign tasks to any employee.

## Filtering and Sorting

In the task list, tasks are arranged in the order they were added, but you can set your own sorting based on Status, Task Name, Product, Assignee, and Reporter, as well as the date of assignment and completion time.

You can filter all tasks in the list based on multiple criteria:

- Contains - you can specify words from the task name for which the search will be performed (for example, all tasks related to invoices).

[Image](<https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003646285/original/2cNJmjyLHc8hej78UVl7OBGsMFZIxxyyHg.png?1646061195>)

# Getting Started with Metrics

## Why Metrics and Dashboards are Important

Metrics and dashboards allow for monitoring key performance indicators (KPIs) by all employees of the company, from individual contributors to managers. By tracking their own statistics, each employee feels a personal responsibility for the company's performance and success. Therefore, it is important to assign specific metrics to each position and establish control over key indicators.

Step 1: Creating the First Metric and Understanding the Mechanics

To begin working with metrics, it is necessary to assign them to a specific position. Once the metric is created, it can be filled out, quotas can be set, and average values can be viewed for specified periods. If the person responsible for achieving the target leaves the company, the metric can always be transferred to their successor.

Step 2: Where to Work with Metrics and More

The main page for working with metrics is the Dashboard. In addition to metrics, it provides additional information that is useful for work.

Step 3: Customizing Custom Work Charts

By default, metric charts are based on a 5/2 work schedule. However, if your company has specialists who work on a different schedule, such as 2 days on, 2 days off, or even without weekends, and as a result, find it inconvenient to fill out metrics, you can customize work schedules for each department. Based on these schedules, metric charts will be generated.

Step 4: Creating a Dashboard and Adding Metrics

A dashboard is a visual representation of multiple metrics on a single page. In addition to metrics, you can also add data from tables or other resources.

# Metrics

## Assigning Metrics to Positions

In addition to specific job responsibilities, every position should have key performance indicators (metrics) that reflect the quantity and quality of an employee's work on that position.

Any position in the structure can have any number of metrics assigned to it. Only employees with "Metric Configuration" access can assign metrics.

This is done through the Metric Editing Mode (accessed by clicking the icon in the upper right corner):

[Image Link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003732053/original/a\_dXr76fyfDKpow\_blJRtN1fxI5re0aT5Q.png?1646155679)

Metrics can have a Name and a Description (explanation if the name does not clearly describe the indicator). They can be reversed (a metric in which the lower the value, the better), and can be made daily, weekly, or monthly. Additionally, two metrics can be combined into a dual metric:

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003732037/original/i\_1lXCddMyQN9dfxnG6Ugpu\_kpLO5wosaA.png?1646155677)

Among the position metrics, there is a main one (GM or GSD). By default, the first metric in the sorting order is designated as the main one. The sorting order of metrics can be changed by dragging and dropping the desired metric.

## How Metrics Work

### General Mechanics

An employee assigned to a position can see their metrics in the "Dashboard" section of the menu and can fill them out there. Depending on the periodicity type of the metric (daily, weekly, monthly), specific dates will be marked on the graph (every day for daily metrics, the last day of the reporting week for weekly metrics, and every month for monthly metrics). However, weekends are not marked on the graph for daily metrics. You can check which days are weekends for your employees and modify them in the work schedules.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003732047/original/WaXAjf4IdBFC1koz6xxJmmOPdu6NPnvpBg.png?1646155678)

### Filling out Metrics

To add a metric value, simply click on the period on the graph where the value needs to be added.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003732032/original/mMnXFi41j2z9uHH1kC00MNhdpM6IbXGQLQ.png?1646155670)

Values can only be entered for past and current periods. For the next period, only a planned value (quota) can be set:

- In daily metrics, a value can be entered for today and previous days. Only a planned value (quota) can be set for tomorrow.

- In weekly metrics, all previous values and the value for the current week can be filled out (only if the reporting day has already occurred).

- In monthly metrics, all previous periods and the value for the current month can be filled out (only if today is the last day of the current month).

Filled values for consecutive periods are combined into a graph, and a trend line is created for the last three periods.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003732043/original/GQsdeS5qGwT7gia3De08rR\_fOR0rtDQ3BA.png?1646155678)

If an employee fails to complete a mandatory course in the academy within the specified deadline, they will not be able to fill out metrics on the dashboard until the course is completed.

However, if the employee has access to filling out metrics for other employees, they will still have that ability, but they won't be able to fill out their own metrics until they complete the mandatory course in the academy.

### Purpose of Quotas

In Metrica, you can assign quotas (expected values for a given period) for any period. To do this, simply click on the plus icon above the selected period.

Depending on the percentage of quota fulfillment, the graph is colored in different colors:

- Green for 95% and above;

- Yellow for 75% to 95%;

- Orange for 60% to 75%;

- Red for below 60%.

Future periods with assigned quotas are colored in gray.

![Quota Graph](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003732033/original/ZQBcpw9S4IPIPT6SXYqVqJHHMSYy935hdw.png?1646155675)

### Who Can See Which Metrics

By default, employees can access their own metrics and the metrics of their subordinates (they can also edit their values if necessary). In addition, an employee can see their direct subordinates right on their Dashboard below their own indicators:

![Subordinate Metrics](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003732052/original/wqN\_Jbim1jwmz0n1D-7gn\_tfZ9WaDwdGqg.png?1646155679)

Each direct subordinate can be expanded to see their metrics in more detail. It is also possible to switch to another user's metrics by selecting them in the switcher at the top:

![Switch User Metrics](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003732041/original/E9V10XK3oLVq62uTAnap30P5ikE4hMVuqQ.png?1646155678)

On their own Dashboard or on the selected user's Dashboard, you can view not only current period values but also past ones by using the date filter at the top of the page, to the right of the employee selection field. If you need to view values for the entire duration of the employee's metric filling, click on the three dots in the top right corner of the graph of interest and enable the "Show historical data" toggle:

![Historical Data](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003732030/original/ZBRSp1ozqrI0Mxik74f\_itTiF2Z-3DyNyw.png?1646155669)

### Issues in Subordinate Metrics

In the metrics of direct subordinates, you can see indications of problems.

![Problem Indications](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73015025437/original/ANeBwk1T2StEHzFwSn7QgTd8vr8dWOdCjQ.png?1657017363)

When you hover over the text, you will see a tooltip indicating which specific aspects are considered problematic. The following situations are considered problematic:

- The employee has empty values on the graphs.

- There are graphs with a declining trend for three periods.

- No metrics have been added for the subordinate's position.

- There are no quotas in the metrics.

### Average Values

If the indicators on the graph differ greatly in values from period to period, or if there is a sudden increase or decrease in values in some of the periods (seasonality, peculiarities of the transaction cycle, etc.), then the "Show Average Values" functionality will be useful in this case.

When activated, the values on the graph will be recalculated to the average values over several periods.

The number of periods can be specified in the metric editing mode in the structure, by default it is:

21 - for daily statistics

5 - for weekly

12 - for monthly

Periods for which there are insufficient values for averaging will be removed from the left side of the graph. By averaging the values, you can examine the dynamics of the indicators, smoothing out the peaks, in order to check the real trend.

Before averaging:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73031058744/original/uExl5ipkXE1xGQfcm9APmm40AKfsNQP3pw.png?1668079115

After averaging:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73031058747/original/DFNaXljAufn1pWDA7QZyTIWYDf-g7jJwGQ.png?1668079123

### Link to Verification Data

Sometimes, in order to calculate a metric, we use different Excel tables or reports. To make it more convenient to check the data, each metric owner can specify a link for quick access. To do this, at the top right of each metric widget, you can specify a link. And once it is provided, an icon will appear in the metric name to navigate to this link.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003732038/original/I0eM-vTrbXqJ8e1Vr6jWOL2DRHwhcFbd8Q.png?1646155677

The data from the specified table will not be automatically pulled, it is just a link to a document or report where the manager can check the accuracy of the metric value calculations.

### Dual Metrics

To combine metrics into a dual metric, you need to create two separate metrics, then enable the respective toggle switch (Dual Metric) for one of them, and select the second metric in the field that appears.

Only metrics with the same periodicity (daily with daily, weekly with weekly) and within the same position in the structure can be combined into a dual metric. However, in dashboards, it is possible to display metric charts from different positions in one widget.

At any time, you can split the dual metric back into two separate ones (all values will be preserved). To do this, simply disable the Dual Metric toggle switch in the metric settings.

Please note that dual metrics currently do not have quotas.

### Work schedules

Depending on the work schedule, different days should be considered as days off and working days for different employees in the case of daily metrics. Periods for metric submission are determined based on the assigned work schedule for each employee.

## Transferring metrics for the same position

If there is a change of employees in a position and you need to transfer metric values, you can do it in the following way:

- Remove the first employee from the position.

- Assign their successor.

- Access the workspace of the first employee (even if they have already been removed, you can still view their metrics).

- Enable the "Show archived metrics" filter.

- In the "Archived Metrics" section for this employee, you will see the metrics they recorded before being removed from the position. For each metric, you can open the successor selection menu. In this menu, you can select an employee from the same position to whom these values will be transferred.

- After selecting a successor, the values of that metric will be automatically copied to them, and they will be able to continue managing it from where the previous responsible person left off.

### Transferring metric values

If you need to transfer a metric between different positions:

- Go to the workspace of the employee from whose metric you want to copy values. In that metric, click on the three dots, then in the menu that appears, select "Show historical data".

- In the same menu, click on "Copy data to clipboard".

- Go to the workspace of the employee to whom you want to transfer the metric values.

- Click on the three dots in the metric, then click on "Paste data from clipboard".

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73026929150/original/00CVziXIASo2u4dj\_CtWumxCXnqPe-HEow.png?1665136625

Please note that if there are already values in the metric, the pasted values will replace the current ones. There will be a warning before the values are pasted.

# User's workspace

The user's workspace is the tool where they can work with metrics, see if they have any pending requests for financial planning approval, if they have any open courses, and how many tasks are assigned to them for the day.

## Working with metrics

All available metrics for the user, as well as metrics for their subordinates, are visible on the user's workspace.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003732244/original/WHm7bP01IcSW9rIQcmHwBawhN4DefQTVjg.png?1646155837

Employees can fill in their metrics here, set quotas for subordinates' metrics, and manage their metrics (transfer them when leaving, view archived data). To display more or fewer periods on the graph, go to Settings -> Structure -> Metric Settings and enter the desired value in the Number of Periods in Metrics field.

You can choose the day of the week when metrics will be filled out based on the reporting day in your organization. To do this, go to Settings -> Structure -> Metric Settings, select the day of the week, and save.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003732250/original/7LKEHNK7WF4IN2nWnEYkymbQNY2ypEF6Ow.png?1646155839

## Desktop Notifications

In addition to metrics, desktop notifications for the user display information about:

- Academy courses that you need to complete;

- Financial plan requests awaiting your approval;

- Open tasks for the current day.

If an employee has an overdue mandatory course, their metrics will be blocked, and they won't be able to enter data until they complete the course.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003732246/original/VSKtErOgMebiXWHjq1VM1vz\_KRDf5ez-QQ.png?1646155838

## Metrics Report

From the user's desktop, you can navigate to the metrics report. The report displays data for individual metrics as well as metrics for subordinates. In other words, the company owner can view metrics for the entire company.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003732255/original/hyEMoseW-\_p2E\_iUthEUj1LAPJwYBkBhOQ.png?1646155840

In this section, the user can see metrics for their subordinates in a convenient tabular format (Project Owner can see metrics for all employees).

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003732254/original/V8hKtdQ4hlq9xyEsPvNXrvYfj\_hUZhyC\_g.png?1646155840

For example, you need to check if all subordinates have filled in their metrics. By reviewing the report, you can easily see this without going through each employee's metrics one by one.

Let's take a closer look at the tool:

In the report, you see the following columns:

- Employee

- Position - employee's position

- Metric - employee's metric name

- Values 7, 6, 5... - ordinal number of the period on the metric

- Average - overall average value for all metric values

- Issues - displays the number of issues in the metric (number of unfilled metric values)

You can use the filters above the table for easier sorting and navigation:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003732258/original/aLDNjpqaURwDrzDBpTzKfvxkzINnzQ\_3bg.png?1646155840

- Position filter

- Search - you can enter both the employee's name and position and the metric name

- Remove last period - removes the last column of ordinal numbers (1)

- Only problematic - leaves only unfilled metrics

- Relative values - converts metric values to percentages (%), with the largest value taken as 100%. This will make it easier for you to compare indicator values with each other.

# Employee Performance Charts

## Work Schedules

You can assign the appropriate work schedule to each employee. By default, the project includes a weekly schedule with two days off (Saturday and Sunday) and a set of additional days off and working days based on the production calendar. This schedule cannot be deleted.

In addition to this schedule, you can create your own. This is done on the "Work Schedules" settings page. The schedule can be weekly or with a custom cycle:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003732293/original/Z5wqyKwQhJEuasWytPZhxDSNT0sSOlZx-g.png?1646155889

- In the weekly schedule, you can configure days off (for example, if you have a six-day workweek and the default schedule is not suitable), additional days off (holidays), and additional working days.

- In the schedule with a custom cycle, you can specify the number of working and off days in the cycle, indicate the starting days of the schedule (for example, the first shift starts with working days, and the second one starts with days off), specify additional days off, and the start date of the cycle (from which date the system will start counting according to this schedule, in other words, the first day when this schedule takes effect).

--- For a schedule with a custom cycle, you can view the distribution of working and off days by clicking on the calendar icon:

-

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003732289/original/\_Gkqsz91pKZ0zmfVTEYI2oEMjpmKBSO4YA.png?1646155889

Employees with access to view and edit work schedules can view and edit them accordingly.

### More about additional days off

In the settings section "Production Calendar," you can configure additional days off/working days. By default, they are not included in newly created schedules.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003732291/original/B7gVBWktlQ5x1kPzoSEuBd7PrcUjv5aVJg.png?1646155889

To ensure that additional weekends/holidays in a new work schedule correspond to those specified in the production calendar settings, you need to click the "Add from Production Calendar" button when creating/editing the schedule.

### Work Schedules and Metrics

On the metric chart, only workdays are taken into account. If the end of the reporting week falls on a holiday, the previous day will be displayed on the chart. The daily metric only shows workdays, so the metric chart for an employee working in shifts will be displayed without breaks on weekends.

Once a work schedule is assigned to an employee, it is recorded in the history. For example, if an employee initially worked on one schedule and then switched to another, the historical metric data will be displayed according to the old schedule, while new data will be displayed according to the new schedule.

### Assigning a Work Schedule to an Employee

A work schedule can be assigned by an employee with user editing access. To do this, open the user editing panel in the Employees section of the Company and select the desired schedule from the drop-down list.

Please note that the schedule is assigned to the employee, not the position. For example, if in your sales department employees work on a 2/2 schedule, and you hire a new employee for the position of sales manager, this schedule will not be automatically assigned to them; you will need to select the schedule for the employee separately.

Note: the schedule for an employee comes into effect from the date of assignment. It does not affect past periods in metrics and only starts to take effect from the moment of assignment.

# Dashboards

## Why Dashboards are Needed

In the Dashboards section, you can create an unlimited number of dashboards. Dashboards can be useful primarily for displaying indicators on various screens and panels in the office. Thus, for example, employees of a specific department will always see the current state of affairs in the department, which influences the increase in group responsibility.

Dashboards can also be set up for personal use by managers. For example, a department manager can display key metrics of subordinate department heads and see the overall picture and critical areas on one screen.

## Setting Up a Dashboard

### Creation

To create and customize a dashboard, you simply need to add the desired widgets to it. This is done by clicking on the "Add Widget" button. In the pop-up window, you can choose the desired metrics and select the iframe option (more on this later).

[Add Widget Button](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003732504/original/ciP5LKrfZUB5HJSJ4sTDW2gHdLzxu\_qh\_Q.png?1646155979)

If you do not have an "Add Widget" button, make sure that you are the owner of the dashboard (only the owner can edit their dashboard) and that you have access to the metrics (you or your subordinates must have metrics assigned).

Note: When adding a widget, you are adding a combination of metric and employee. Different employees will have different values for the same metric. Therefore, if, for example, you change an employee's position, you need to remove the old widgets from the dashboard and add new ones (as the old ones will display values from the previous owner).

### Displaying data from other systems

If you want to display data from another system (e.g., Google Sheets) on the dashboard, you can add an iframe window to the dashboard and specify the link to the sheet.

[Iframe Window](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003732500/original/Er4HGPojjQQkh2swTFFf5yW0BbQTcIawWw.png?1646155978)

After adding the link, the widget settings will display data from the linked webpage. Here's an example of how the dashboard will look if you add a table.

[Dashboard with Table](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003732503/original/5GMhba-KyufvOYqdluWTcD6VT4rrKvVlTw.png?1646155979)

If you are displaying data from Google Docs using an iframe, make sure that the access settings for these documents allow access via the link. Otherwise, the data will not be displayed.

Similarly, you can add a widget with data from other systems if, for example, some of the metrics need to be loaded externally.

### Display customization

After adding the widgets, you can sort them in any desired order.

[Sorting Widgets](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003732514/original/sSqCa5dEFhDlpZdB0zf\_Tcso8JOdP90fdw.png?1646155982)

The dashboard is built as an invisible grid. Each widget occupies a certain number of columns and rows (as seen in the widget settings):

[Widget Settings](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003732505/original/JO5rX7gpguVJ643xZLEzLTTzaKoIGv6NJw.png?1646155979)

You can edit the total number of columns in a row to adjust the sizes of the widgets. For example, if your widgets have a width of 4 cells, setting the number of columns to 12 will arrange the widgets in rows of 3 (3 \* 4 = 12):

[Adjusted Widget Sizes](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003732507/original/LKRH3NZj-StP0REMe0AHiYU0WiGdFyAkkQ.png?1646155980)

If you do not want to publicly display metric values (when outputting somewhere on the office screen), each widget has a setting "Hide left scale", so only the graph will be visible:

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003732516/original/RYwKL7X4fJYmnyJZrtqVBOjH0cMljOj\_-w.png?1646155982)

Additionally, the dashboard can be switched to presentation mode (also for output to the screen), in which the left menu is hidden:

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003732513/original/-Fji8ZC-LXh\_di9XrFuYQ8WLHYZE0T0KGw.png?1646155980)

## Access

Access to the dashboard can be given to all employees or specific positions. By default, only the dashboard owner has access to view it. Editing access is always reserved for the dashboard owner (we will add the ability to transfer ownership later).

If you need to transfer ownership of the dashboard to another employee, you need to open the access settings and select the desired employee in the "Owner" field.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003732502/original/YdPQAYqhjFjYh\_fzccrA80mKd9teNnJxAg.png?1646155978)

After this action, you will lose access to the dashboard (unless you have view and edit access to all dashboards).

The project owner and an employee with dashboard administration access can see all dashboards grouped in folders.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003732501/original/Y-XbF8WDmpb6JUT72X7bGY\_vre2SaJ1X1g.png?1646155978)

- Favorite Dashboards - those that you have marked as favorites

- My Dashboards - all dashboards that you have created

- Issued to Me - all dashboards to which you have been granted special access

- Others - dashboards of all company employees except those in the folders above

There is no possibility to sort dashboards among themselves, they are sorted by creation date from old to new.

Dashboard search works both by dashboard name and by the last name of its owner. For example, if you enter an employee's last name, you will see a list of all their dashboards.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003732499/original/hTMKOfNkAS9XuS8UzmxU14Nrz-VhYVCPLQ.png?1646155978)

# On Financial Planning - Where to Start

## Financial Planning

With the help of the financial planning tool, you can control the allocation and use of company funds for any purposes and tasks. You can build the process in such a way that any expense is made only after fixed justification and subsequent approval.

In the current version, you can collect and initially process all requests for any expenses in the company in one place. In the future, the tool will significantly expand and be supplemented with new capabilities for financial management within the company, as well as for analysis and optimization of expenses.

## How to work with financial planning in Platrum

The mechanics of the workflow are simple:

Every employee can create a request for approval of a specific amount for a particular task. An employee can create a request only for expense types that are available for their position. The request is then reviewed by a chain of positions according to the organizational structure, up to the owner. You can configure which positions in the chain can be skipped and which are mandatory for any request.

Step 1: Create expense types

Since employees can only create requests for expense types available to their positions, you need to specify in the transaction type settings which expense types are available for which positions.

Step 2: Create the first request

Once you have set up the appropriate expense types for positions, you can proceed to create requests.

Step 3: Customize the basic settings

By default, the approval chain for requests is built vertically from the position of the employee who created the request, through all their supervisors to the project owner. However, in many companies, employees from the finance department are involved in the final approval, while some supervisors are not involved at all. You can change the order in which requests are approved in the settings.

# Transaction Type Settings

## Adding expense types

On the expense type settings page (Settings -> Transaction Type Settings -> Expense Types), you can create the necessary types and categories of expenses.

All expenses are initially linked to a specific department/position in the structure.

[Image Link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003734356/original/A8Bvf6h96-mXD8F29pHUkImrtWreT8hvQQ.png?1646157212)

After creating a type for a specific position, you can create another type for that position or create a hierarchical structure. For example, you can create an expense type "Staff Recruitment," which can be further divided into "Recruitment of Line Employees" and "Recruitment for Managerial Positions." These types can be further detailed as well.

<https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003734352/original/Rb1nGLeUtURK0OrrQKezZi2YfIv6xtEyWA.png?1646157209>

In financial planning, your employees will be able to create funding requests for both the lowest level of expenditure type and the highest level (often a request is made for the entire category, without unnecessary details). In the example above, a funding request can be created for both "Staff Recruitment" and "Staff Recruitment > Hiring Line Staff > Sales Managers".

However, in finances, expenditure transactions are only created at the lowest level. In the above example, this would be only "Staff Recruitment > Hiring Line Staff > Sales Managers" and "Staff Recruitment > Hiring for Managerial Positions".

## Moving expenditure types

Each expenditure type has an icon to open the transfer window for that type. In this window, you can select another expenditure type or department to transfer this type with all its subtypes to.

For example, if you have decided that recruitment expenses should be accounted for in each department (to be included in their profitability) rather than in the HR department, instead of deleting the old types and creating new ones in the desired department, you can simply move them.

## Purpose of department breakdown

Employees of each department can create funding requests in financial planning only for types that are linked to their department, as well as for types in their vertical structure.

Thus, once you have set up the breakdown of expenditure types by department, you do not need to manually grant access to all new employees to the necessary types every time.

If you need multiple positions to have access to the same expenditure type, add it for the general manager. Then, all subordinate positions will be able to create requests and transactions with this type.

# Working with funding requests

## Creating and editing a request

You can create a new request by clicking the plus button in the top right corner. In the opened panel, you need to fill in the amount, describe the product or service for which this amount is needed, select the request type (depending on the type, the "Position" field will be automatically filled in), describe the problem and the solution (i.e. how this product or service will solve the problem). At the end, select the financial planning period for which the request is made.

In the "Request Type" field, employees can only see types that are linked to their position or to the positions of their vertical leaders in the financial planning settings. Even if an employee has access to work with all requests or create transactions, they will not be able to create requests for unavailable expenditure types.

[Link to image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003734630/original/fc76EjHYpwaqAOfcoxdhiGGHIt5CTG6E2A.png?1646157424)

In the list of requests, you will see your own requests as well as those of your subordinates within your vertical. By default, employees do not see requests from colleagues in the same position. However, if necessary, this option can be enabled in the financial planning settings.

Editing requests can be done by:

- the employee who created the request, until it is rejected or approved

- the managers within their vertical

## Request approval

Requests are displayed in a list. If an employee has access to all requests, they can see all requests. If not, they can only see their own requests or requests where they are involved in the approval chain.

An employee who can provide their approval for a request will see buttons for rejection or approval next to the respective request.

If an employee can also provide final approval, they will see the corresponding icon (note that the last person in the final approval chain can provide final approval without prior approvals in the chain).

A rejected request can be sent back for further processing (in this case, it will have to go through the entire approval process again).

After final approval, the request moves to the "Approved" status.

## Adding the paid amount to a request

For a fully approved request, the actual paid amount can be entered. This can be done by an employee who has the appropriate access (refer to access settings -> Expense Transaction Editing). For a fully approved request, they will see a special icon:

Images:

- ![Image 1](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003734632/original/1MfqxQ9xLDyMSxECXPSijwg05LX2kfaVPw.png?1646157425)

- ![Image 2](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003734633/original/ru9Ags-7NIF8dCYk3FSwT1QZr1AzAC8Y-g.png?1646157425)

- ![Image 3](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003734621/original/LHQCwpTL4XeiFQibvvT0y5MCrS6C4ZW\_gA.png?1646157420)

- ![Image 4](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003734623/original/Uvqah9Zxcc-HKzCODL8wqLqwfKAvzIoh1w.png?1646157423)

- ![Image 5](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003734629/original/mcUJyNeBrPOzmOCAQx5dfwXtAwHEml3P3w.png?1646157424)

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003734625/original/WU8isJlx4VVeEhm7SRpZsnhMhrgqk6TBWA.png?1646157424

Or you can add an expense directly from the request:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003734631/original/XBi6z8lpIfrqMjlLS6baT35BjKz3Lk28Tw.png?1646157425

When you click on the icon or button, a window for creating an expense transaction will open:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003734628/original/Ed9-W1W85dw7BdX8d7UsWjbk8P0xbZtjQg.png?1646157424

In this window, you can enter the cash from which the payment was made, the amount paid, and specify the expense type (if you have an empty list of cash registers, see how to create them in the Finance section below). However, if you don't select the "Move the request to paid" checkbox, the entered amount will be saved, the transaction will be created, but the request will still be in the "Approved" status. This is useful when, for example, a budget was prepared and approved in advance for multiple tasks/payments. In this case, you can enter the paid amount in parts and see how much has already been actually paid from the requested amount:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003734624/original/QI1xrDs9XQOraTGI2u6DzrZpQqLDv\_3p-w.png?1646157423

The expenses for the request will be visible within the request itself:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003734626/original/tmuwKzf2GeBnDOSyvEgDSQ20gw2SlrQxsw.png?1646157424

If you select the "Move the request to paid" checkbox when entering the payment amount, the request will be moved to the "Paid" status.

# Financial planning settings

First of all, you need to configure the tool according to your business needs. To do this, go to the settings section by clicking on the gear icon:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003734771/original/slPJFLXTmUjo3\_S0OfFsFPYHsuowoaGS5g.png?1646157535

On the opened page, the first two settings relate to the request approval chain.

By default, the approval chain includes the managers of the employee who submitted the request, up to the project owner.

In the top field, you can build the chain for final approval of the request. These positions from left to right will participate in the approval of all requests regardless of who created them. For example, you want the Financial Director to finally approve all employee requests. Even if he is not directly related to the employee who submitted the request, he will be able to approve them all if added to this field.

That is, first the request is approved by all the managers of the employee vertically, and then it is approved by those who are specified in the settings. If the same position is part of both the approval chain and as a manager, the employee will approve the request only once as a manager.

Next up is the configuration that allows you to hide certain positions in the approval chain. For example, you can remove the administrative and general directors, as well as the owner. In this case, if a request is made by an administrator of a section, it will be approved by the department head and then directly by the positions in the final approval chain. This way, you can relieve the owner from the need to approve all requests.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003734770/original/YSPFDzxeLWQvQsXc5uAN5a10Lt1rl0juBA.png?1646157534

Next is the configuration of expenditure categories. For each position, you can assign your own categories.

Categories of the entire vertical structure are available to positions within that vertical.

For example, if a category is created for a department, both the administrator of that section and the general director can create a request in that category. However, the administrator of a section in another department will no longer be able to create requests with that category.

# Funds in financial planning

## What are funds used for

The fund system is a way to allocate incoming revenue to different directions

to structure cash flows and have more accurate expenditure planning.

Each fund is intended for a specific purpose and solving specific tasks. It is like an envelope where you set aside a portion of your earnings, from which you can later withdraw them to solve a specific task. At the same time, a specific fund is intended for specific expenses. For example, you cannot take money for bonuses from the office maintenance fund and spend more money than you have allocated for specific needs.

In connection with this, Funds are closely related to Finlan - the department that takes money for its activities cannot take more than what is in their fund.

## Where to start configuration

Starting work with funds is very simple, to do this:

- Open the settings of your project

- Scroll down to the Finance Plan section

- Choose Funds

- Enable the toggle "Use funds"

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73007730657/original/yX87YORoLwYNzopobPWeMixOvPfRar076A.png?1650542539

You will see on the page all the types of expenditure transactions that you have created. By default, they are grouped into the system fund "Other". It cannot be deleted, as it is where any unallocated revenue types end up and where the balance from unallocated revenue accumulates.

### Access provision

In order for someone other than the project administrator to be able to create, edit, and delete funds, this employee needs to be granted access to "Fund Settings" in the access settings.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73007743995/original/N6Nh3RjDfv11RtEgtp0Ab64CoGUv3XZNDw.png?1650549758

The "Modify Fund Balances" access allows for fund transfers in the financial plan between funds.

If you have an employee who works with requests (such as a financial or operations director), you can grant them this access. They will have the ability to manage fund balances.

Please note: This access allows for viewing all funds and their balances, but it does not provide access to view all requests. Therefore, if the employee has restrictions on this based on their position, they will also need access to view all requests.

The access to modify fund balances does not grant rights to create, edit, and delete funds.

If you need the employee to only be able to view the list of all funds without being able to make changes, grant them access to "View All Requests in the Financial Plan." In this case, the user will have access to information about all funds on the requests page, but they will not be able to modify fund balances or edit them in the settings.

### Creating a new fund

To create a fund, click on the "Add Fund" button in the top right corner. The panel for creating a new fund will open on the right.

Here you can specify:

- Fund name

- What percentage of revenue will go to the fund balance (a hint is displayed below the field indicating how many percentage points are still available)

- Initial fund balance.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73007731033/original/t0WsEZ3Y\_4yfAp6conT3xjk79hZBsyOZPQ.png?1650542827

All fields except the name are optional, so you can create a fund with 0% allocation and not specify a balance.

You can edit your fund's data at any time by clicking the pencil button to the right of the fund name.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73007731382/original/wnLqAN1UbAXGjT6mDytjMaaDQoveR4wUyw.png?1650543051

### Adding expenditure types to the fund

Once a fund is created, you need to add expenditure transaction types to it. This is necessary so that in the future when working with the financial plan, you can see which requests belong to which fund, how much money is available for use in the fund, and the amount you can approve for requests. This will help you understand which expense requests can be approved and which should be postponed.

To add an expenditure type to the fund, drag it from the "Miscellaneous" fund to the desired fund.

If you have the "Display expense types up to the second level" setting enabled in the financial planning settings, you will be able to move entire groups of expenses at once.

In the example below, we moved the expense type "Office" to the "Operating Expenses" fund. All child types associated with the "Office" type were also moved along with it.

You do not have to move all child types to the same fund as the parent expense type. You can distribute them among different funds if needed.

Link to image: [https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73007735267/original/9uafD3W2zYWa6pElA3PTuqLeEkLFwpWnFw.png?1650545733](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73007735267/original/9uafD3W2zYWa6pElA3PTuqLeEkLFwpWnFw.png?1650545733)

## How Funds Work in Financial Planning

### Creating and Approving Requests

Once you enable fund management in the settings, all requests on the financial planning page will be grouped by funds. The balance of each fund is displayed above the list of requests next to the fund name. These are the funds available for approving expense requests.

Link to image: [https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73007742855/original/Aa9bWBcaxRE\_W23tzxsYSlujcKYGwQuvfQ.png?1650549172](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73007742855/original/Aa9bWBcaxRE\_W23tzxsYSlujcKYGwQuvfQ.png?1650549172)

When creating a new request, it will be assigned to its corresponding fund. When a request is finally approved, the fund balance will be reduced by the amount of the request. If an approved request is rejected, the amount will be returned to the fund balance.

If there are requests with amounts in different currencies, the total amount will be converted to the default cash currency.

### Transferring Funds between Funds

If you notice during the process that there are insufficient funds in one fund to approve all requests, but there are excess funds in another fund, you can directly transfer money between funds on the financial planning page. Clicking on the arrow button will open a window where you can select the source fund, target fund, and the amount to transfer.

Link to image: [https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73007743540/original/Yom9l7aDMs-ithIpWaGfz8QenGThVCLD3Q.png?1650549512](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73007743540/original/Yom9l7aDMs-ithIpWaGfz8QenGThVCLD3Q.png?1650549512)

### Increasing Fund Balances

The fund balance will increase whenever a new income transaction is created in the project. The amount will be divided based on the percentage allocation and each portion will contribute to the balance of its respective fund.

If you have multiple cash registers with different currencies in the project, the income amount will be converted to the currency of the main cash register.

# Payment Approval

## About the tool

Payment approval allows for more accurate budget planning for the company in conjunction with the financial plan. The essence of this tool is that you can create records of planned payments in a table, and employees responsible for the payments will approve whether to pay this payment now or postpone it to another time.

## Access configuration

To start working with payment approval, you need to enable this tool in the financial planning settings. The project administrator receives access upon enabling. Other users will have access to the tool if:

- The employee is involved in the payment approval chain.

- They have access to view or create payments.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73015016788/original/4AyCFMvGb-usIdaVcmBgU4VUdfm6Qa2pUQ.png?1657011452)

Access to the payment table allows viewing payments only for the cash registers and financial projects available to the employee. Therefore, when setting up access, make sure that those who will be working with the table have the necessary access to the cash registers and financial projects.

When payment approval is enabled, you will have a field where you can specify which employees will approve the payments. Unlike the financial plan, there is no strict sequence in this chain, where payments are approved one by one, all participants in the chain are equal.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73015017050/original/ru-jAqSYnvJLWkq-vJqxxHPumKMDjiQ4yA.png?1657011618)

## Creating and editing payments

Once the access is granted, you can start working with the table. Payments can be created manually one by one or imported in bulk from a CSV file, if you have already been keeping such records in tables or other tools.

When creating a payment, you need to fill in the following fields:

- Cash Register - where the payment will be made from.

- Payment Type - this can be expenditure approval or money transfer between cash registers. Depending on this choice, the subsequent set of fields is determined.

- Payee - in the case of expenditure, you can select a contractor here, and in the case of a transfer, the receiving cash register.

- Transaction Type - expenditure type or transfer type from those established in the settings.

- Amount

- Project

- Request - if the payment is related to an approved request in the financial plan, you can indicate this connection in the payment. Only approved requests with the same currency as specified in the payment are available for selection.

- Report Date - the date on which the future transaction should be displayed in the reports.

- Payment Date - planned payment date.

- Description - payment request description.

- Comment - additional comments from employees.

The last two fields are collapsed in the table, but they can be expanded by clicking on the description or comment text.

## Payment Approval

Employees with payment approval access have action buttons available next to each payment. There are five actions:

- Approve - this marks the payment with one of the approval stages

- Reject - the payment will be rejected and not available for further approval

- Pause - in case the payment needs to be delayed and paid later. Other action buttons will disappear and the status will change

- Resume - only available for paused payments. This action will return the payment to the "Under review" status and allow payment approval

- Create transaction - only available for approved payments.

[Link to image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73015019176/original/jHlhmklAQv1lEtDkX4GrHf\_AQRs9nLC0Jg.png?1657013017)

If a payment has been approved by one approval chain and new participants are added later, it will not need to be approved again and will remain in the "Paid" status.

## Creating Transactions based on Payments

Once a payment is approved, it becomes possible to create a transaction for it. Clicking the button will open a creation window filled with payment data. Make sure to double-check all the information before creating the transaction.

You will not be able to create a payment for an amount greater than what was originally approved.

When the transaction is created, the paid amount will be reflected in both the payment and the financial plan request, if it was linked.

To set the payment and request to the "Paid" status when creating a transaction, do not forget to check the corresponding checkbox.

[Link to image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73015020899/original/iI7R\_K3ood\_ONh0PlSgMofl9AeMbsC1M1w.png?1657014314)

# Getting Started with Finance

With this tool, you can manage all major financial operations: create cash accounts, income and expense transactions, transfers, and view various reports. You can also link expense transactions to requests in the financial plan.

In this article, we will explain how to set up the tool and get started.

## Who has access to the tool

By default, the tool is only available to the Project Owner.

Full access to working with the tool can be granted to other employees in the Settings->Access->Finances section.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73021087869/original/4N6hfnMbphJBcXhjotf48zSONfe5exefhQ.png?1660924761

You can provide both full access and limit the work with finances to certain employees by allowing them only to view certain reports.

## Getting Started

Step 1. Adding transaction types

All income, expense, or transfer transactions should be structured so that you have a clear understanding of where the money is coming from and how it is being spent.

A transaction cannot be created without specifying its type.

Step 2. Adding transactions to projects

After creating transaction types, you can add transactions to the projects. You can do this by uploading them from an excel file or manually one by one.

Step 3. Adding new cash registers and projects

By default, your project has one cash register "Main". If you are working with multiple accounts or money is being distributed among different business areas, you can add more cash registers and create separate projects for each area.

## Reports

Transactions added to the project form the basis for generating reports. Currently, the following reports are available in Platrum:

VAT: Report on cash flow.

Balances: Report on the state of your accounts at any given time.

P&L (profit and loss): Report on the company's profitability.

Monthly plan: Report showing the company's profit by month with the ability to set a percentage increase in profit.

# Setting up transaction types

## Adding transaction types

On the transaction types settings page (Settings->Transaction Types Settings), you can create the necessary types and categories for expenses, income, and transfers.

All expenses are initially tied to a specific department/position in the structure.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003735088/original/ZoNUD-g-GXe8v0p\_y5MqgYIXtvkUW9lyLg.png?1646157822

After creating a type for the necessary position, you can create another type for that position or create a hierarchical structure for it.

This possibility exists for both expense types and income types.

For example, you create an expense type "Staff Recruitment", which is divided into two types: "Recruitment of Line Employees" and "Recruitment for Management Positions". These types can be further detailed.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003735085/original/IYcFVw7ICHjOVSyITL4hhSoRjbsdpuVL3g.png?1646157822

In financial planning, your employees can create requests for allocation of funds at both the lowest level of expense type and the highest level (often a request is made for an entire direction, and excessive detail is unnecessary). In the example above, a request can be made for both "Staff Recruitment" and "Staff Recruitment > Recruitment of Line Employees > Sales Managers".

However, in finance, expense transactions are only created at the lowest level. In the example above, it is only "Staff Recruitment > Recruitment of Line Employees > Sales Managers" and "Staff Recruitment > Recruitment for Management Positions".

## Moving expense types

Each expense type has an icon to open the transfer window for that type. In it, you can select another expense type or department to which this type and all its nested types should be transferred.

For example, if you have decided that expenses for employee recruitment should be accounted for by each department (to be considered in their profitability) rather than the HR department. In this case, instead of deleting old types and creating new ones in the desired department, you simply move them.

## Why department breakdown is needed

Employees of each department can create requests in financial planning only in types tied to their department, as well as in types of their vertical structure.

Thus, once you configure the breakdown of expense types by department, you do not need to manually grant access to all new employees to the necessary types every time.

If you need multiple positions to have access to one expense type, add it for the general manager. Then all subordinate positions will be able to create requests and transactions with that type.

# Basic financial settings

To start working with the tool, you need to create projects and cash registers.

## Projects

If you manage multiple lines of business, you can create corresponding projects and assign the appropriate project to each transaction.

For example, if your company is involved in equipment manufacturing, sales, and service, you can create three different projects for each of these activities.

If you have multiple projects, this field and the corresponding filters will be displayed on the financial pages, and you can select the desired project from the list when adding a transaction. If you have only one project, these fields will not be displayed in the list.

### Access

By default, project editing is available to the Project Owner. To allow a team member added to the project to edit the list of projects in the Settings -> Access -> Finances section, grant the necessary employee access to edit projects.

[![Access](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73021087206/original/K\_5lDmkNUT1T0crqw9I-22LhV0CiFCL1Yg.png?1660924481)](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73021087206/original/K\_5lDmkNUT1T0crqw9I-22LhV0CiFCL1Yg.png?1660924481)

### Adding a Project

To add a project, click on the "Create" button in the top right corner of the page.

[![Adding Project](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003735823/original/pz4N4fGZBjvudMIKleT6qwCGcxA8TyXttQ.png?1646158347)](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003735823/original/pz4N4fGZBjvudMIKleT6qwCGcxA8TyXttQ.png?1646158347)

In the pop-up window, you can specify the project name and select it as the default project. In this case, it will be automatically filled in the corresponding field when creating transactions.

## Cash Accounts

Cash accounts are all accounts where your company's money is stored or whose status can affect the company. This can include cash safes and various representative bank accounts, as well as personal accounts of the owner if they are involved in the financial activities of the company.

[![Cash Accounts](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003735825/original/0BZjvo8Cygx0yB2w4Obq1mwpaUjT3Dvy3g.png?1646158347)](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003735825/original/0BZjvo8Cygx0yB2w4Obq1mwpaUjT3Dvy3g.png?1646158347)

Account balance data will be displayed in the balance reports for each cash account.

### Access

Each cash account can be given access to specific positions. This access will restrict the list of cash accounts that an employee with transaction creation access can create transactions for. For each position, you can also enable access for all subordinate positions (arrow to the left of the position name).

[![Access](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003735824/original/ohEnfk2wuHUxF9gLiB81sd7uw-q6bxyjzQ.png?1646158347)](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003735824/original/ohEnfk2wuHUxF9gLiB81sd7uw-q6bxyjzQ.png?1646158347)

The limitations do not apply to reports. If an employee has access to a report, they will see all the information by default.

If you need to grant someone access to work with all cash registers and allow them to edit them, simply enable it in the access settings.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73021087376/original/NEz3nMdPqpa2AtUu7SL3RV9ivFBz-9YilQ.png?1660924554)

### Creating and Editing Cash Registers

To create a cash register, go to Settings -> Finance -> Cash Registers and click on the "Create" button in the top right corner. In the pop-up window, enter the name of the cash register, the currency, and choose whether this cash register should be used by default when creating transactions.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003735817/original/ASuNl-Lh\_O-gIiXxegxpOVoh4Vz2PbAOxA.png?1646158344)

Here, you can also specify the currencies used for each cash register and the initial balance, if any. You will be able to generate financial reports for each cash register in their respective currencies.

# How to Add Transactions in Platrum

## Adding Transactions One by One

In Platrum, you can add transactions on three tabs: Income, Expenses, Transfers. On each tab, you can add a new transaction by clicking the blue "Add" button. This will open the transaction creation window.

When creating a transaction of any type, you need to provide the following details:

- Cash Register: This is a mandatory field and determines which cash register the transaction will be associated with. In the case of a transfer, you need to specify the source and destination cash registers.

- Type: This is a mandatory field and determines the type of transaction to which the transaction will be linked. The types are selected from a list in the settings.

- Amount: This is the amount of the transaction.

- Description: This is an optional field where you can add additional comments or a description of the transaction.

The transaction creation date is automatically set to the current date. However, you can specify a different date for reporting purposes. This can be useful if you want to record a transaction for a different period than when it was entered. For example, if a customer pays an invoice for January in February, you can choose to record the transaction in January.

For income transactions, there is an additional option to distribute the amount over multiple dates. For example, if you receive a large sum of money for a service that will be provided over several months, you can use this setting to allocate the revenue across multiple months. To do this, enable the "Distribute Income" flag when creating the transaction and choose how you want to distribute it:

- The amount will be evenly distributed over several months, with the first installment starting from the next month.

- Part of the amount will be credited on a specific date, while the remaining balance will be spread over several future months.

- Manual selection allows you to specify the dates and amounts for each transaction.

To view the data for specific dates in your Profit and Loss (P&L) and other reports, select the desired representation in the "Transaction Date" field:

- Transaction Date: Based on the date the transaction was created.

- Report Date: When building the report, the transaction date will be based on the date selected in this field.

- Accrual Date: Revenue will be displayed for the periods selected for accrual.

Note:

If the accrual date is not specified, transactions will not be considered in the accrual date representation.

## Importing Transactions from a File

Instead of manually creating each transaction, you can import a list of transactions directly into the project. You can import transactions of all three types (income, expenses, transfers).

### Preparing the File

The import is performed from a CSV file (any spreadsheet can easily be saved in this format). To import, you need to prepare the file in the following format:

| Cashbox | Amount | Author | Type | Creation Date | Report Date | Description |

|---------|--------|--------|------|----------------|-------------|-------------|

| ИП Иванов | 10000 | Евгений Ленский | Поступление от оплаты счета | 07.02.2020 | 03.06.2019 | "ООО ""Ромашка"" - Оплата по Агентскому договору № 1" |

| Основная | 999.59 | | Поступление от оплаты счета | | 03.06.2019 | "ООО ""Ромашка"" - Оплата по Счету №21" |

| Основная | 1500 | | Поступление от оплаты счета | | | |

- In the Cashbox column, specify the name of the cashbox as it was defined in the project. The Cashbox is mandatory.

- Decimal places in the amount should be indicated with a period. The Amount is mandatory.

- The Author should be specified according to the name in the project. It can be omitted, in which case the transaction will be attributed to the employee who performed the import.

- The transaction type is specified exactly as named in the project. The transaction type is mandatory.

- Transaction types in expenses can have a nested structure, which is represented in the file using the > symbol. For example: "Operating expenses > Office rent". The > symbol is separated by spaces.

- The creation date can be specified if necessary. By default, it will be the import date. The format is strictly dd.mm.yyyy.

- The report date can be specified if necessary. By default, it will be the import date. The format is strictly dd.mm.yyyy. The report date is used to reflect the transaction in the report for the correct date.

- The description can contain text with comments for the transaction.

Once the table is ready, save it in CSV format (comma-separated). For example, in Google Sheets, you can do this by going to the File menu -> Download -> CSV file.

As a result, you will obtain a file like this:

Example income import (https://s3.amazonaws.com/helpscout.net/docs/assets/5e70a9832c7d3a7e9ae9498a/attachments/5e74f9132c7d3a7e9ae9862a/%D0%9F%D1%80%D0%B8%D0%BC%D0%B5%D1%80-%D1%82%D1%80%D0%B0%D0%BD%D0%B7%D0%B0%D0%BA%D1%86%D0%B8%D0%B8%CC%86-%D0%B4%D0%BE%D1%85%D0%BE%D0%B4%D0%B0.csv)

### If a financial plan request needs to be specified in the file to associate it with an expense

If you are using the Financial Plan tool in addition to finances, most expense transactions should be associated with the corresponding request.

To avoid manually searching for requests and changing their status, two additional columns need to be added to the table:

- Request - the request ID (its number)

- Mark the request as paid - whether to pay it in full or not (takes values 0 or 1).

Thus, a row in the table where the transaction has a request that needs to be marked as paid will look like this:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003735450/original/ZrRd1VlhF\_TTGXa41IU7Toof479aoGd9CQ.png?1646158102

If you want to associate the expense with a request but not mark it as paid, you should specify 0 in the column "Mark the request as paid".

### Import process

The import process is performed on a separate page. Income, expenses, and transfers are imported separately. On each of their pages (income, expenses, transfers), there is an icon for importing (available to those who can create transactions).

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003735449/original/SD2B50HrSehPIbsSyW83lIl82XKPI3g0lw.png?1646158102)

On the import page, you can download an example and upload your file. After uploading the file, the import process will begin. If there are any errors in the file, the import will not occur, and you will receive a detailed error output that will indicate what needs to be corrected.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003735453/original/b8peVBCVpBVsT5uhPeJWLm6\_JERN1HERjA.png?1646158104)

After fixing the errors in the file, you can retry the import. After a successful import, you will see the number of transactions created.

## Using the API

In addition to the methods described above, you can also automate the process of adding transactions to the platform using the API. The required methods for this are described in the documentation -

[API Documentation](http://api.docs.platrum.ru/modules/fintransaction/)

If you did not find any methods in the documentation that you need for your work, you can view their format in the browser console. Write to us about it, and we will take it into account when improving the documentation.

# Working with transactions

In Platrum, you can work with three types of transactions:

- Income

- Expenses

- Transfers

By adding transactions to the project, you set up working with financial instruments in Platrum: Finance and Finplan.

## Working with multiple currencies

In Platrum, you can work with multiple cash desks, which can be in different currencies.

Financial reports for working with multi-currency cash desks have fields for converting to a single currency and currency filters. More information on working with reports can be found in other articles.

Conversion to other currencies is carried out at the exchange rate of the Central Bank of the Russian Federation valid on the date of working with the report. This means that if you view a report and convert transactions from one currency to another, the conversion rate will not be the one that was at the time of creating the transactions, but the current one. The rate is updated daily.

# VAT Report

The VAT (Value Added Tax) report aggregates data on all transactions that have been added in the project.

## Access

By default, the VAT report is accessible to the Project Owner. To grant access to other employees, go to Settings -> Access -> Finance and provide them with "VAT Report" access.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73021088619/original/PLPBe2T5Q3GPIvBPlkqMxur29v0eeYjZ6Q.png?1660925110

An employee with this level of access will see a comprehensive report on the movement of funds. Even if certain cash registers are not accessible to them, they will still be able to view transactions related to those cash registers in the VAT report.

## Functioning

The report is generated automatically and structured according to the transaction types specified in the transaction type settings.

The report consists of three sections:

- Profit

- Income

- Expenses

Income and expenses correspond to the sum of transactions added in the project, while profit is calculated automatically based on the difference between the two.

Each level of the report can be expanded to view more detailed information about the purpose of the transaction, the cash register/project it is associated with, the author of the transaction, and the date it was added.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73021088913/original/4Z9nrSqAiySuSo4COSzV9X93La8D84i6ZQ.png?1660925234

All of this facilitates control over the company's finances.

The report can be generated for a specific time period and grouped in different ways:

- By time (day/month/year) - the grouping affects the level of detail in the report. If Day is selected, the transactions will be detailed for each day in the selected period. If Year is selected, only the total sum for the year will be displayed.

- By transaction date - you can choose to group the transactions by their creation date in the project or by the date of the report. In some cases, these dates may not coincide, and this grouping option accounts for that.

- By departments - by default, expenses are grouped by expense transaction types. You can switch the view mode to group the expenses by departments.

## Exporting the Report

If you need to export the report, you can click on the copy icon in the top right corner and then paste the data into any desired table.

There is an option to partially export the data, for example, only for a specific transaction type. In that case, click on the sum within the transaction type, and a list will expand. In the top right corner of the transaction list, you will find the copy button:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73035868543/original/UuoERkB5hgYGRqaHcIzz3nXjxaNcejCo6Q.png?1671101529

# P&L

## About the Report

P&L (profit and loss) is a financial report that shows a company's income and expenses. It is useful for evaluating a company's financial performance over a specific period of time. Unlike the balance sheet, which simply shows revenue and expenses, the P&L report breaks them down into components, allowing for a better understanding of the company's actual profit at different stages.

## Access

By default, only the project owner has access to the report. In order for other employees to view the report, appropriate access needs to be granted in the Settings -> Access Rights -> Finance menu.

[Access Rights Screenshot](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003736671/original/ZYTbZdwBZycVKkht9EroQ7aVxiwwnqvF-g.png?1646159040)

Access can be granted for viewing only or for both viewing and configuring the report settings. Employees will only see data in the report for the cash registers they have access to. Therefore, if they only have access to one out of several cash registers, they will only see data for the one they have access to.

## How It Works

The report retrieves all transactions that have been added to the project and groups them accordingly. This grouping is based on the link between transaction types and report groups. The report can be generated based on the transaction creation date or the report date, with grouping options available for days, months, and years.

[Grouping Screenshot](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003736674/original/GU4S3GS4bgY3FNtzGFjQ3-7z8jCOMW0XNg.png?1646159040)

The groups and their association with transaction types are created in the P&L report settings. For information on setting up transaction types, refer to the relevant article.

## Exporting the Report

If you need to export the report, you can click on the copy icon in the top right corner and paste the data into any desired table. It is also possible to export data selectively, for example, for a specific transaction type. In that case, click on the amount for the transaction type, which will open a list. In the top right corner of the transaction list, you will find the copy button.

[Exporting Screenshot](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73035868145/original/s5URSRWohIF9brv-2jJ1Ltjm5eK829pz\_A.png?1671101307)

## Report Configuration

To ensure transactions are grouped according to your preferences, you need to create and configure the report in the Settings -> Finance -> P&L section.

To create a report, click on the "Create" button in the top right corner, fill in the report name field, and click on the "Save" button.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003736668/original/E8UkZ23Y3MrEVGe7s0tnXOU-Wze3l8Uv7w.png?1646159039)

Adding a group

In this example, we are using transaction groups that are normally used as a basis for creating a P&L report. However, you can add your own groups based on the specifics of your business and preferences. The platform does not limit you to any standard.

To do this, click on "Add Group", enter a name, and save it. Let's add the first income and expense groups.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003736662/original/js3ch7h\_CrqgOlvHd1VzHxUYNxMvowSayQ.png?1646159038)

Groups can be added as static or formula-based. The formula is built from the already added categories. To create a formula when adding a transaction, check the "Formula" box.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003736663/original/7nwCcUWC6dhwntKUywfsWCBzxlnlHbRucw.png?1646159038)

Let's add a new group calculated by a formula (it has a special marker in the list).

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003736672/original/r3XxFS-naJkqnfftvGAOvr0TwuzkoJuMxA.png?1646159040)

In this way, we create all subsequent categories.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003736660/original/YF6kCcPtaK8-KAGYnEsd6FrhPAZcnm2\_Nw.png?1646159038)

To visually analyze the grouped data more easily, let's color the groups. This can be done by clicking on the pencil icon next to the group name.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003736675/original/513CCAXyogG6rlmbFyeuSbJq9Es2GbwM0w.png?1646159040)

Result:

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003736664/original/YwItnambJR1TgfN3e2tYS9Kg1rabdc9D2Q.png?1646159038)

### Configure report groups

Now let's allocate transaction types among the categories. To do this, drag the group from the ungrouped categories into the one we created.

As a result, the number of attached transaction types will appear next to the report group name, and if you expand the group, you will see what exactly it includes. This way, you can always adjust the report.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003736665/original/vX7N4o1gdafwCw8XE-MV6cPSbmZHJaR3dw.png?1646159039)

When all categories are filled out and transactions are added to the project, you can view the generated report:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003736673/original/sgpm60LAr0wgzqPCGAqeIyqCeu2-0w2yYg.png?1646159040

When new transaction types appear, you need to go to the P&L settings page again to add the new type to the appropriate category.

If you add a child category to a transaction type that already exists in its category, this subtype will automatically be included in the appropriate category.

## Amortization

When adding an expense transaction to the project, you can specify whether to amortize it or not:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003736648/original/HyseOFmGCaWNH4e-ei4lP\_a6SAYjSPqQDQ.png?1646159032

In this case, the expense will be evenly distributed over the specified number of months.

To enable this functionality, you need to enable the corresponding option in the transaction settings:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003736666/original/eUgHEGPN2KHXuLyuw9jNjVRmFRZdjUNgwg.png?1646159039

# Balances

Balances is a summary report of the cash balances in the added registers in the project.

It allows you to see the current state of all the company's accounts at a specific moment in time.

To ensure that the data is up to date, all transactions passing through the added registers need to be added to the project.

## Access

The "Balances" report is available to the project owner and employees who have been granted access:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73021087982/original/35t4Xx\_r31gKw5x89pqqrBicCA8Ld\_SkLw.png?1660924829

An employee with such access can view the Balances report for the registers available to them.

If you are unable to open this report, it is likely that you don't have access to any registers or access has not been granted in the settings. In this case, please contact the owner of your project to check for access permissions.

## How it works

The report is generated for each cash register added to the project.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73021088175/original/YziAzRdMGJbmQMbxF42DZDfZj-rGTnPFag.png?1660924903

Each cash register can be expanded to see the transactions carried out within the selected period, by whom, and for what purposes.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73021088264/original/gI1UiEW4uwCGNz0dpGtXdfp65UvBU\_utbg.png?1660924940

In addition to the overall report, you can select a specific cash register in the filter. In this case, the data will be shown only for the selected cash register, or conversely, excluded from the list.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73021088406/original/Q0cLjYqDYca7m4QlEsQ7GS8qhll9Vn5kLw.png?1660925007

By default, the report data is arranged by the report date. You can always change this filter to the transaction creation date. In this case, if you have transactions with creation dates different from the report date (specified when creating the transaction), the data in the report will be recalculated.

The reporting period can only be one day, as the state of individual cash registers changes on different days, and it is meaningless to output the company's balance for multiple days. Such a report cannot be built.

# Monthly Plan

The monthly plan shows the company's total revenue by day with growth dynamics and deviations.

The report allows you to view the average revenue on business days and weekends, compare revenue for different periods, and set a revenue growth plan for the company and monitor its implementation.

In addition to the description, to get a more detailed understanding and see how to work with the report, you can watch the tutorial video.

## Who has access

Monthly planning is available to all users who are granted special access in the access settings

https://roistat.platrum.ru/file/image?id=f3113fae8d74c2094fe90188c6f8608c

An employee with such access will be able to see the plan for the cash registers accessible to them in the report. Thus, if you have multiple branches with different registers or different employees responsible for different cash registers within one company, you can grant this access to all of them, and each of them will be able to see data only for the register they have access to.

The project owner sees the report for all cash registers.

## How it works

The report presents revenue data for each month. There are three columns with revenue indicators:

- Total revenue for the month

- Average on a working day

- Average on a weekend day

The average figures are calculated based on the number of working days and the trend to the base. The base value is the maximum revenue value from previous periods.

For example, if you have just started using the system, the base value will be 0. After the first month, you will have revenue data that will be used as the base for the following month. In the next month, if the revenue value exceeds the previous one, it will be used as the new base.

This allows for calculating the revenue growth trend of the company.

## Percentage growth in the plan

In the plan, you can specify the percentage growth by which you plan to increase your earnings in the current month compared to previous periods. Based on this value and the maximum value from previous periods, the Plan is calculated.

The plan for weekend and working days will differ and are calculated based on the respective revenue data for weekends and working days. The configuration of which days are considered weekends and working days is taken from the project's general settings.

Deviation from the plan is calculated relative to the percentage of earnings and can be either positive or negative. This allows you to see how close you are to achieving the revenue growth plan at any given time.

Revenue data is included in the report based on financial transaction data that you add to the project. Therefore, to make the report as useful as possible, it is recommended to add all transactions from all cash registers.

# Counterparties

Counterparties are all those with whom the company has any contractual relationship. These can be your suppliers, employees, customers, i.e., anyone who has obligations to fulfill to you and receive compensation from you, or vice versa, someone who should pay you for goods or services.

In Platrum, you can keep track of all your counterparts and monitor who pays you and to whom you pay, and in what amounts.

Accounts receivable management is currently not fully implemented but will be available in future updates.

## Creating counterparty

You can create a counterparty on the counterparty list page by clicking on the blue plus button in the top right corner. A menu will open where you can enter the counterparty's details. You only need to provide the name to save it, but you can also fill out the full profile with all the details. This can also be done when editing a counterparty.

<https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003741902/original/FS3FdFXiR1Fv5BQSUAIsBULTtwKjHur9NQ.png?1646163162>

Each counterparty has unique fields. The main fields include:

- Phone number

- Email

From the requisites:

- Tax identification number (INN)

- Tax registration reason code (KPP)

- Bank account number

It is not possible to create two different counterparties with the same INN or phone number.

To edit the list of counterparties, an employee needs to be granted access to edit counterparts.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003741900/original/vDhQhJzQLSx21Dmawp6wUm71u0iPo\_rtMw.png?1646163162

## Counterparties in Transactions

To start collecting statistics on settlements with your counterparties, you need to associate them with the corresponding expense and income transactions.

To do this, select the required counterparty in the "Counterparty" field when creating a transaction. If you forgot to create it in advance but have already started adding a transaction and want to associate a counterparty with it, you can quickly create it directly in that field by clicking on the "Add counterparty" button. A window will open where you can enter the minimum necessary information and create a transaction with a new counterparty.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003741896/original/ozGvr7vfT5ko5qriNxtErWJS70\_9\_dxtXg.png?1646163161

This field supports search, you can start typing to find the counterparty you need.

Search is done by:

- Counterparty name

- Full organization name from requisites

- INN

Matches will be highlighted in yellow

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003741894/original/FyyJEiEHBwRByNOAMEQ37ADN1R4o86F5Wg.png?1646163160

A new "Counterparty" column and corresponding filter field will be added to the list of transactions. You can filter and sort all transactions by counterparties.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003741901/original/ha-PIApGMlGQOF9eQmZUb9rsnFtcBk7ktg.png?1646163162

## Counterparties in Reports

### Summary Report

Some reports include filters and views by counterparties, so you can see in different perspectives who you have settlements with and in what volume.

So, in the summary report there are two sections: income structure and expense structure. By default, they categorize all transactions by type.

By toggling the "Payment Structure by Counterparties" switch at the top, these charts will be rearranged and all funds will be divided among your counterparts. Hovering over a part of the chart will show the counterparty and the amount spent.

### VAT report

In the VAT report, there are also filters and grouping by counterparties. The filter allows you to exclude any counterparty.

When filtering by counterparty, only transactions related to that counterparty/counterparties will be displayed if multiple are selected.

To switch to the counterparty report view mode, you need to turn on the "Group by counterparties" toggle. With the grouping by counterparties enabled, the hierarchy will be as follows:

- Operation type (income, expense)

--- Transaction types

----- Counterparties

------- List of transactions in detail.

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https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003741897/original/ze03xWAZc1TKzklFOAciY1hXwmpxOSLGnw.png?1646163161

# Summary Report

The summary report consists of a set of charts and statistics that allow you to monitor overall income and expenses based on the most popular transaction types. It also provides an overview of all financial operations in the project.

If no currency filter is selected in the report, the default currency from the cash box will be displayed.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73021086833/original/gRkCt0fhRxxbIJ-C1qPfDhyRSpRx3RTAhA.png?1660924310

## Filters

With the help of filters, you can view statistics on the types of data that interest you:

- Project - filter by financial projects.

- Currency - currency based on the Central Bank of Russia (updated once a day).

- Period - transactions for the selected period.

- Cash boxes - filter by cash boxes. You can exclude selected ones.

- Transaction Type - a filter for transaction types. Selected types can be excluded.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73015832096/original/btBRdXAZ5SkvXMOLxyoM6WAxv\_HRSd308g.png?1657620963)

## Income and Expenses

This widget displays and calculates the total profit of the project based on the selected filters.

Profit is calculated as the difference between expenses and income.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73015829331/original/wdCuNYNwJSi0B8y8Tu30QJGQvEbZ9zC4WA.png?1657618927)

## Monthly Plan

This is based on the Monthly Plan for the selected projects in the filters.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73015829894/original/6MYHR\_2WNhtcmGOmaBhsu-kfSPNlmYn2rw.png?1657619249)

## Account Balances for the Period

This widget displays the remaining funds in all cash registers, or based on the selected filters.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73015831349/original/Jcm8V1jXmY2MSKQFlt3lI3bwRU5JoItqng.png?1657620331)

## Income Structure

Shows statistics for income transactions based on the selected filters.

The statistics are based on the top 5 largest transaction types. The rest are categorized as "Other".

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73015831948/original/K7cPTU6QaFn3py2pkKB25LRMeY45i2Angw.png?1657620809)

## Expense Structure

Shows statistics for expense transactions based on the selected filters.

The statistics are based on the top 5 largest transaction types. The rest are categorized as "Other".

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73015832043/original/FDZPPtqpCgDL115DInNL96-pG-EOu8htZw.png?1657620910)

# Getting Started with the Quality Control Tool

The Quality Control Tool simplifies the process of checking the quality of employee work and helps interpret the results with a summary report that is automatically generated.

Additionally, you can watch a video review of the tool. Please note that the video demonstrates the old method of setting up the audit panel (which is still available), but for the Chrome browser, there is a more convenient solution in the form of an official extension (https://chrome.google.com/webstore/detail/orgstack-%D0%BA%D0%BE%D0%BD%D1%82%D1%80%D0%BE%D0%BB%D1%8C-%D0%BA%D0%B0%D1%87%D0%B5%D1%81%D1%82%D0%B2/dkdalkngeeihjgjgohgnfhfomohicmbh).

## Who has access to quality control

By default, auditors, those being audited, and their supervisors have access to quality control reports. Each of them can only see data on the audits in which they are involved. For example, if you are a sales department manager or supervisor, you will only see the audits that pertain to your work (or the work of your subordinate).

An auditor can see all the audits they have conducted, but they cannot see the results of their colleagues' work.

Ordinary employees who are not involved in audits and are not auditors cannot access the Quality Control tool unless they have special permissions.

To have access to all the data in the reports, an employee must have the appropriate access rights configured in the settings.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003742121/original/GUKVgkJRTKRQ62DhO65-WwHFXGpKjNuvRg.png?1646163363

There are two access levels that provide rights to:

- View reports - allows viewing reports for all audited employees, even if you are not an auditor or audited employee (or their supervisor);

- Checklist management - allows creating, modifying, and deleting checklists. Suitable for quality department administrators.

## Getting started

The tool operates on the principle of comparing completed work with the expected result according to a specific checklist.

When using this tool, employees work with the following entities:

Step 1. Creating audit checklists

These are the criteria against which the auditor will evaluate the employee. At the beginning of the work, it is necessary to create the required number of checklists, specify the audited employees, and the responsible individuals for the audit. Within a checklist, access can be limited to specific individuals.

Step 2. Setting up the verification panel

The verification panel is a widget that allows employees to open the relevant checklist on the page where the completed work needs to be checked. The widget opens on top of the checked window. This can be anything from a CRM deal page to a Google Sheets document.

Step 3. Reviewing the results in the report

Data from all verifications is aggregated into a single report, where employees with appropriate access can view the results of checks for a specific employee or department.

# Checklist Management

Checklists are pre-created evaluation criteria that auditors rely on when assessing the quality of work performed by other employees.

## Access

Employees with the following permissions can create checklists:

- Checklist creation

- Checklist management

Only an employee with "Checklist Management" access can edit and delete checklists.

[Image Link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003742394/original/vjGt7iHpvJyBPf58pJnN5Xx4mS0nUiQ\_ag.png?1646163568)

## Creating Checklists

On the "Checklist List" page, you can view all created checklists and create a new one. To create a new checklist, click on the plus sign button in the upper right corner.

[Image Link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003742393/original/xql2Epzxl33QyfIcQNuR2EKi8sOMoC8B9A.png?1646163568)

When creating a checklist, you need to fill in several fields.

## Components of a Checklist

Checklist name

- It will be displayed in the auditor's dropdown list during the check. Therefore, it is better to choose a concise and meaningful name that will immediately indicate to the auditor which checklist to use.

Link to the checked page

- This is a required field where you need to specify the link to any page that can be opened in a browser, on which the auditor will assess the quality of the employee's work. If it is a page of a specific entity, such as a CRM deal, replace the unique entity identifier (id) with a universal variable in the format {id}.

Auditors

- In this field, you need to list the employees responsible for conducting audits. Only these employees will be able to perform checks based on this checklist. Different auditors can be selected for different checklists, for example: the specific nature of checking the sales department employees will clearly differ from the specific nature of evaluating the work of technical support, and therefore different employees should perform checks for different checklists.

User selection limitation

- Here we select the employees that will be audited within this checklist. Following the previous example, for evaluating technical support and the sales department, we will have different checklists and different groups being audited.

Violation and sanction mapping table

Here, we list possible violations in order, which may be committed by an employee, provide a description of the violation (if required), the amount of fine for the violator, and the bonus for the auditor (if you plan to use a system of fines and bonuses). Each line can be assigned a sorting order for the violation, as well as removed if it is no longer relevant.

Example of a completed checklist for evaluating the work of sales department employees:

[Image Link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003742395/original/9FjATzMk-NkAZbv235c2\_jZ4SlcWQsjYjQ.png?1646163569)

Fines

- This is an optional parameter. If your company does not practice imposing fines, you can leave these fields blank.

After everything is filled out, click the "Save" button. If anything changes, you can always edit the checklist.

After setting up the verification panel, checklists will be displayed in a widget for the convenience of auditing employees:

[Widget Image Link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003742396/original/JMq3-fgXNnLQjGUM01IGk8D-\_phGt4A6Ww.png?1646163570)

Only the checklists related to a particular page are displayed on the audited page.

## Checklist List

Once all checklists are created, they are available in the Checklist List page as a list.

The list shows the names of the checklists, links to the audited pages, the number of checks, and the date of the last check. You can sort your checklists by any of these columns. There is a search function that works based on the checklist name and the link to the audited page.

On the right side of each checklist in the list, there are three icons that allow you to:

- Trash can icon: delete the checklist

- Pencil icon: edit the checklist

- Eye icon: open the report for that checklist.

# Setting up the inspection panel

For the convenience of quality control employees, we have developed a widget that allows the inspector to enter data during the inspection without switching between windows/tabs.

There are two ways to set it up: using a bookmark in the browser or using the Google Chrome browser extension. Let's consider the setup for both options.

## Google Chrome extension

1. Install the extension from the Google Chrome Web Store.

2. Right-click on the extension icon and select "Options" in the pop-up window.

3. In the opened window, enter the hostname (the text before .platrum.ru in the browser address bar).

After entering the hostname, click "Save". A notification will appear stating that the settings have been successfully saved, and you can close the window.

Once you have completed these steps, open your CRM (or any other tool where the employee's work is tracked, such as Google Sheets or an internal ERP system) and click on the icon in the browser panel. A window with the corresponding checklist will appear.

## If authorization fails in the extension

If you see login fields in the opened extension, but nothing happens after logging in, it means that you have blocked third-party cookies in your browser settings.

To fix this, enter "chrome://settings/cookies" in the browser address bar, which will open the settings page.

Select "Block third-party cookies in Incognito" mode.

After that, open the widget again on the desired page, and the extension should work properly.

Bookmark in Browser

This method was used before the introduction of extensions but it is still functional and can be used if you prefer to use a browser other than Google Chrome.

You can find the link to add to your bookmarks, as well as detailed instructions, in your project's Settings -> Quality Control -> Verification Panel Setup section:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003742499/original/\_he\_1bzzsiu4vC6wYn7Wx5-aNOlkdq2JxA.png?1646163672

# Quality Control Report

On the Quality Control "Report" tab, you can view a summary of the verification results. All data is collected automatically, and you can choose which parameter to filter them by for analysis.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003742873/original/S8zWVQf-S27XFUmupFcpRvdtyL8s-1nyVA.png?1646163922

Report Filter Parameters

- Checklist: Displays all checks for this checklist (if no other filters are applied);

- Report Date: The time period during which the checks were performed;

- Manager: The employee being checked;

- Auditor: The employee conducting the check;

- Deviations: A list of violations from all checklists. You can select multiple deviations to show checks where these violations were identified (at least one deviation per check);

- Departments Being Checked: The report will be organized by departments if you specified them in the checklist settings;

- Number of Checks From: Displays checklists where the number of checks >= the number entered in the filter. This is useful, for example, when assessing quality percentages, to exclude checklists with a small number of checks.

## Grouping

You can group the data in the report by Auditors, Managers, and Issues.

Without grouping, the columns will show the auditor and manager names, check page (ID), number of deviations, manager penalty, auditor bonus, comments, and check date.

### Grouping by Auditors

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003742876/original/D2knCPVreGSDg4aAru-lQSC63BFaLdktaA.png?1646163923

With the specified grouping, the following indicators will be displayed for each auditor in the report:

Problematic Pages

- number of pages where errors were found;

Checks

- number of performed checks;

Problem detection rate

- the ratio of the number of problems found to the number of checks performed;

Deviation found

- the number of deviations found during the check. Differs from the number of problematic pages in that there may be multiple deviations on one page;

Manager's penalty

- the total amount of penalties received by the manager during the selected checks;

Avg. penalty

- the average amount of penalties for the checked items. This indicator will be useful to identify specific violations or observe if there is any trend in reducing the size of penalties (and therefore violations) by the employee;

Auditor's bonus

- the total amount of bonus that the auditor will receive during the selected checks;

Avg. bonus

- similar to the average penalty, it shows the arithmetic average of the auditor's bonuses;

Top 3 problems

- three most frequently occurring problems, expressed as a percentage of their occurrence.

### Grouping by managers

All indicators in this grouping are similar to the indicators in the grouping by auditors. The only difference is that instead of the "problem detection rate" indicator, the "quality rate" indicator is displayed.

It is calculated using the formula 100% - n problematic pages / n checks. That is, if an employee has 1 problematic page out of 10 checks, the quality rate will be 90%.

[Image Link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003742871/original/CJK45H7I5b6EOFF\_-fXPTZl7v4Es7RHyLQ.png?1646163922)

### Grouping by problems

In this grouping, the problem names are accompanied by the following indicators:

Deviations found

- how many times this problem occurred

Problem occurrence rate

- the percentage representation of the problem's frequency of occurrence out of the total number of problems.

Manager's fine -

the total amount of fines received by the manager during the chosen inspections;

Auditor's bonus -

the total amount of bonus that the auditor will receive during the chosen inspections.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003742870/original/mEpjQxmwCtiRuGy3z4poc0ksNyIS3AwyMA.png?1646163922

## Statuses for conducted inspections

Statuses for conducted inspections in quality control are necessary for you to work with employees' mistakes. This will help employees avoid making the same mistakes again.

You can see the statuses for inspections by clicking on the "Expand Issues" filter.

New

- the inspection has not yet been discussed with the employee;

In progress

- the inspection is being discussed with the employee, and work is being done to clarify the errors;

Resolved

- the violations have been discussed with the employee;

Rejected

- the inspection has been rejected.

# How to store passwords in Platrum

## Tool description

A secure and simple password management tool. Store and administer both personal and work passwords. Easily and controlledly grant employees access to the passwords they need. Always know how many people have access to a particular password and change it in a timely manner, if necessary.

## Security

When developing the password management tool, we put security first. As a result, password storage is organized as securely as possible.

- All passwords are sent to the server already encrypted and cannot be decrypted without your involvement.

- You assign a master password to each password category, which is used to encrypt the passwords in that category. Without the master password, it is impossible to obtain your data, even with access to your account or directly to the servers

- Master passwords are never sent to the server and are only known to you.

The master password is set when creating a category and is requested for any action involving passwords in that category (not only decrypting the password itself, but also deleting, editing, adding a new one, etc.).

The entered master password is stored in the browser and is no longer requested while you are working on the password page. It is stored in encrypted form in the browser's memory and is not visible to anyone. When refreshing the page, switching to another section, or closing the tab, the master password is erased from the browser and will need to be entered again.

This way, your passwords are securely encrypted and not stored anywhere in plain text. Decrypting a password is only possible with the master password, which is known only to you and your trusted individuals.

You can change the master password in the category menu:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73018924912/original/Mm5piHDBaV\_FgttXiOITAvfORBrWl64q6A.png?1659544614

## Workflow

### General Mechanics

You or your trusted employee save passwords in the system. Along with the password, you provide additional information for convenience: login address, name, description, login. Passwords can be organized into categories (folders) for better organization. When creating a category, a master password is set, without which it is impossible to decrypt passwords within that category.

Then you grant access to the necessary passwords or entire categories to your employees.

When a new password becomes available to an employee, they receive a notification about it. In the tool, the employee will only see the passwords and categories they have access to.

However, without the master password, the employee still cannot copy the password itself, so you also inform them of the master password separately.

With the master password and access to the password, the employee can copy it to the clipboard for pasting on the required login page.

When you need to retrieve a password from an employee, you simply revoke their access to that password. However, in reality, the employee still knows the password because they may have saved it somewhere. The system automatically reminds you of this fact, additionally showing the employees who previously had access to the password. This serves as a reminder to change the password.

### Creating Categories

Before uploading passwords, you need to create categories. For each category, you need to set a master password, which will be used for encrypting your passwords and additional access verification (in addition to accessing the category):

For simplicity, you can use the same master password for all categories, as it will not significantly affect security.

Note: the master password cannot be reset or recovered, as it would compromise the security of storing your passwords. Therefore, if it is lost, retrieving passwords will be impossible, and you will have to re-enter all the passwords.

Therefore, be sure to save the master passwords somewhere safe to avoid forgetting them. The master passwords themselves will not give anything to an intruder, as they will still need access to your account.

### Adding Passwords

In the created category, you can create passwords one by one or upload multiple passwords at once. To create a password, you need to specify its name, login page address, login, and the password itself. Additionally, you can add a comment.

Bulk password upload is available from the drop-down menu in each category:

[link to image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003743194/original/XIOCVwVFaEHJTyxdECrnmrdHSLw3RD9fnQ.png?1646164204)

The import panel shows an example and displays real-time errors in the text you have pasted:

[link to image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003743195/original/KWyzxPS2SfdvXL-o4CdZxHbe2KfFqrnTSg.png?1646164204)

### Duplicate Password Checking

All passwords are checked for duplicates. The check is done based on the URL and login. If both the URL and login are the same, the password will be considered a duplicate. Thus, the duplicate entries will be highlighted:

URL:

mail.yandex.ru (http://disk.yandex.ru/)

; Login: ablaev.v

URL:

mail.yandex.ru (http://disk.yandex.ru/)

; Login: ablaev.v

[link to image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73024671735/original/mfjyVgCyGWGKflJKvAAWr0kCGZ3lIWTX\_A.png?1663589140)

This is necessary in cases where there are multiple passwords, and you may accidentally enter the same access into the password manager, as well as to prevent you from creating duplicate access in the same system (to enhance the security of your accounts).

### Granting Access

For each category, you can grant an employee access for viewing or editing. With editing access, they will be able to edit both the category itself and all the passwords within it.

You can also specify separately whether this employee can edit access (for example, add other employees). If you enable this option, they will only be able to grant access at their own level (viewing or editing) and only to their subordinates.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003743197/original/1EoOVyd-XZPF5b1kd5yh6nl8T\_VF5a3CGA.png?1646164205

The same mechanism can be used to configure access to a specific password within a category. In other words, you can grant an employee access only to the password(s) they need.

To edit password access, click on the value in the "Accessible to" column:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003743196/original/oglSs6Rttdtt2OdIPG33zFZHv5C5wzTTmg.png?1646164204

### Revoked Access

Revoked access is displayed for both passwords and categories. This is a list of employees who once had access to this password/category but now have had their access revoked.

If the password has not been changed since then, essentially this employee still has access to the password (they may have saved it when they had the opportunity). Therefore, when the number of revoked accesses grows, it's time to change the password.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003743193/original/QY4oYvZRJK5nD-yUHkDDgN2WByAHL9IZtw.png?1646164204

After changing the password, revoked accesses are reset, as these employees no longer know the new password.

### Administrator Access

In the project access settings, you can grant "Password Administration" access. This access allows viewing, editing, and creating new passwords and categories in the project. Of course, the employee will also need the master passwords, as without them, they can only create new categories but not view existing passwords.

# More about password management security

In this section, technical details are provided to confirm the claimed security of password storage.

First, let's make sure that neither the master password nor the passwords themselves are transmitted to the server in unencrypted form.

## Creating a category with a master password

We try to create a new category and specify the master password. In the

network

tab, we see a request for saving and make sure that the master password is not transmitted to the server: the parameter

encrypted\_sample\_password -

this is not the encrypted master password, as it may seem, but a verification text encrypted using your master password as a key.

This sample will be used to validate the correctness of the entered master password in the future. In other words, this is not the master password and it cannot be obtained from here:

[link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003743436/original/DMQZgNFCtAeJvOSaYE\_Zb9xEdDkqLT8x4g.png?1646164393)

## Saving a password

We try to create a new password, enter the data, and save it. In the

network

In the first version, this tool is less suitable for automating inventory management in a retail warehouse, but we will expand this functionality in the future.

Currently, the tool can be used for inventory management.

## Warehouse Access

If an employee is assigned to a specific item, they can access the Warehouse and view all units of the item assigned to them. If the employee does not have special permissions, they will only be able to see the items and will not have access to inventories, transactions, or the ability to edit warehouse settings. Employees responsible for company assets have special access in access settings:

[Link to Access Settings](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003743766/original/K-f9\_e2TeKgp\_n9O1mcotPrjbfS1wSDpJQ.png?1646164688)

### Getting Started

In the articles in this section, we will provide a detailed discussion of the following:

#### Warehouse Settings

To start working with the warehouse, you need to create warehouses and product categories.

#### Working with Products

#### Working with Documents

#### Depreciation Transactions

# Working with Products

When you access the Warehouse, you will be taken to the Products tab.

To view products, click on the "Filter" button, select the desired filters, or click "Show all products".

If you don't have any products yet, you need to start by creating the first product.

## Adding a Product

To add a single product, click the blue plus button in the top right corner. A product addition window will appear, where you need to specify:

- Name

- Service Life in months

- Inventory number

- Category

[Image: Adding a Product](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003744167/original/mrgSI9hPSCmb00pPyiB4BGUcmPI2BermPg.png?1646165022)

The fields for product name and category are mandatory. The other fields are not required, but we recommend filling in the Service Life and Inventory Number.

The service life needs to be indicated in order to calculate depreciation expenses, while the inventory number will allow assigning a unit of a particular group of goods to a specific employee. Otherwise, all chairs added to the project can be assigned to one employee.

By adding products, we create a list of the specific goods in the project, but it does not represent the actual receipt in the warehouse. To have a specific unit of goods counted in the inventory, a Goods Receipt transaction needs to be created. More information on working with documents is described in the article.

## Importing Products

If you are already managing your inventory, you can import products in bulk. To do this, you need to prepare a file in CSV format, listing the products in a specific order. You can see an example by downloading the import file template here:

[Download import file template](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003744171/original/a4pIgP0eXXQg7rQ9Qy9sniItgpSa-bGnqw.png?1646165025)

When creating the table, in order to assign individual units of goods to different users, each unit needs to have its own inventory number assigned.

Based on the import, a Goods Receipt transaction will be automatically created with the specified products.

## List of Products

The added products are displayed according to their categories. The table for each category includes the following details:

- Average purchase price - the arithmetic mean of the product's cost in that category.

- Residual value - the market value of the products in the category after purchasing the product (analogous to its market value).

- Service life in months - the estimated period of time the product is expected to be in use. This indicator affects the calculation of depreciation expenses and is specified when the product is received into the warehouse.

- Remaining service life in months - the difference between the service life and the time elapsed since the product was received into the warehouse.

- Quantity

For all indicators except quantity, the average value is calculated.

You can find more detailed information about the products in the table by clicking on the name.

[View detailed information about products](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003744170/original/8uknKGIZXLXWTaFX2IEK\_H0n76yu00XaoQ.png?1646165024)

In the opened window, in addition to the displayed indicators in the table, you will also be able to view the product history: when it was received, who it was assigned to, and which warehouse it is stored in.

If you are purchasing a similar product, you can clone an existing one instead of creating a new one, by changing the service life and inventory number. To do this, click on "Clone" in the product information window.

Once all the products are added, you can add a new document to any of them: Receipt, Write-off, Transfer, Inventory.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003744169/original/UD2dSB1wbt4mxdfTdpjGnZQczu-o3oU8wQ.png?1646165023

# Working with documents

In the current version of Platrum, you can create documents: Receipt, Write-off, Transfer, Inventory.

You can create them based on a product in the product list or in the relevant document section by clicking on "Add".

https://roistat.platrum.ru/file/image?id=94006c176b9e52d0b4d79840e0c72efd

## What are documents for in Warehouse

The Warehouse in Platrum helps manage the inventory of company goods in physical warehouses.

By creating documents, you can keep track of the company's current assets, conduct inventory, see the residual value of equipment, plan expenses for future purchases, and calculate depreciation expenses.

## Access

To work with documents in the Warehouse tool, an employee must be granted corresponding permissions in Settings -> Access -> Warehouse. The project owner has all permissions by default.

https://roistat.platrum.ru/file/image?id=75391aff23c9bf2050497f1605c79200

Permissions can be:

- View transactions

- Edit transactions

Therefore, when assigning a warehouse manager, they should have all the permissions from this list. Edit permissions provide full access - to create, modify, and delete transactions.

### Receipts

A receipt is a document created when adding a product to a warehouse. When creating a new receipt, a window opens where you can select a product from the previously added list. The document can specify:

- The quantity of the added product

- Purchase price

- Residual value - an equivalent market value of the product, an approximate amount that can be expected when selling the product after purchase. Depreciation deductions are calculated based on this value.

To create a receipt, you must already have the corresponding product in stock. Multiple different products can be added within one document.

[Receipt Example](https://roistat.platrum.ru/file/image?id=faa53f57f27414422a7bd3f21a3aa404)

The document can be saved as a draft or marked as completed if the product has already been purchased.

While the document is in draft state, it can be edited at any time. After marking the document as completed, changes to the receipt cannot be made.

After the receipt is completed, it will appear in the general table.

[Receipt Table Example](https://roistat.platrum.ru/file/image?id=81fdf67580cc623ef4e770ec5a683d5f)

### Write-offs

A write-off is a document created when writing off a product from a warehouse.

The mechanics of working with a write-off are similar to working with a receipt: when creating the document, you need to select the product to be written off, the warehouse (if there are multiple) from which the product needs to be written off, and the quantity of the product to be written off. The write-off amount will be automatically calculated based on the residual value when specifying the quantity of units to write off.

[Write-off Example](https://roistat.platrum.ru/file/image?id=52d7952f4ad45a341ba259e7b70bef1c)

The document can also be saved as a draft or marked as completed.

### Transfers

This document is intended for cases where a company has multiple warehouses and needs to reassign goods from one warehouse to another. For example, when a company opens a new branch and part of the assets from the main office need to be attached to the new branch.

When creating the document, you need to select the item for transfer, which will show how many units of the product are in stock at the current warehouse, and the warehouse for the transfer.

In the "Quantity to Transfer" field, specify how many units of the product need to be moved to the new warehouse.

[Transfer Example](https://roistat.platrum.ru/file/image?id=1c4b77e3f18a61dab5088fdf7b04e2c6)

Similar to other documents, the transfer can be saved as a draft or marked as completed.

### Inventory

Inventory is a verification of the correspondence of goods recorded in the warehouse to their actual presence in the company.

When conducting an inventory, it is necessary to create an "Inventory" document and specify the inventory items that interest us in it.

When selecting a product, the quantity of this product currently recorded in the warehouse will be shown. If you did not find this item in any warehouse during the check or found it but it is not suitable for use, the actual balance of 0 is indicated in the inventory.

[Image](https://roistat.platrum.ru/file/image?id=30b663c3ee36d6a35485e9e36edab262)

By clicking on the "Fill from stock" button, all inventory items that need to be specified for the inventory in the company will be displayed in the list of products.

When saving the document as completed based on this inventory, a cost write-off document for the residual value of this unit of goods will be automatically created. The corresponding write-off will be linked to the inventory, indicating that this is a corrective write-off based on the conducted verification.

[Image](https://roistat.platrum.ru/file/image?id=c48e008895710893c75de3c6cdb26740)

# Warehouse settings

To start working with the Warehouse, it is necessary to create a warehouse and add product categories. To do this, open the Settings and there will be a subsection Warehouse at the bottom.

When no warehouses have been added to the project yet, start by creating the first one.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003744830/original/QOuRvaXhRYIDelCgrv\_85uFZzc4-\_jdIBw.png?1646165502)

## Creating a warehouse

In the "Warehouses" section, click on the "Create" button in the upper right corner.

The warehouse addition menu will open.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003744829/original/TPAP-a5AkZN5T8Zvxjd1KDcq2tYI23dtsQ.png?1646165501)

In it, you need to enter the Name and indicate whether it should be considered as the default warehouse or not. To complete, click "Save".

The created warehouse can be edited or deleted at any time.

You can create an unlimited number of warehouses in your project, for example, if you have multiple offices where separate accounting needs to be kept.

## Creating product categories

After the warehouse is created, you need to create product categories.

Click on the "Add category" button, where there will be only one field for the category name.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003744825/original/VPq34RMoikrVj4vDiU\_Y6cfGnJVb2HhS5w.png?1646165498)

To the right of the category title, there are depreciation percentage settings, which will be separately described in the article "Depreciation."

You can add a subcategory to any category by clicking on the + sign:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003744827/original/sE4ZvvO2IDC8N6J3j4KbfxGhuMSML-BpTw.png?1646165500

Each subcategory can have its own depreciation settings and create additional subcategories.

## Creating Additional Fields

You can add additional fields to the product card to include more information about the company's assets.

To do this, go to the project settings, click on the "Warehouse" tab in the "Settings" section. Here you can create, edit, and delete additional fields.

To add a field, click on "Add Field" in the top right corner:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73037404768/original/VI3v-R\_OakqDEijzIy50s0bTvv3jA93jzA.png?1672300866

Enter the required field name and select the field type:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73037404773/original/i9iDENIfAt83tK9OnlppYkLavFnhHlJ6Ww.png?1672300881

You can optionally fill in a default value that will be automatically populated when creating a product.

In the additional settings, you can specify the sorting to determine the order of the fields. Note that all additional fields will always be displayed after the default fields.

The system name is automatically filled and is not displayed in the project, but you can change it if desired.

After adding an additional field, you will be able to see it in the product card:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73037405465/original/41iDNiYMwdCew5vMHBcIbbWu0OuPtPx9bg.png?1672301576

# Depreciation

## About the Tool

Depreciation transactions are transactions that are automatically created every month for each product with a specified useful life and residual value.

The depreciation mechanism in Platrum is implemented from a management accounting perspective, not an accounting perspective. The main purpose of this tool is to show the amounts the business loses monthly due to the wear and tear of the company's assets.

The amount of each transaction is calculated using the formula where the residual value of the product at the time of its receipt is divided by the useful life:

{Residual Value} / {Useful Life in months} = Monthly Depreciation Amount

There are several types of transactions:

- Primary - a transaction that is created when the difference between the purchase cost and the residual value of the item is received;

- Depreciation - transactions that are created monthly when there is a residual value and a useful life for the item;

- Write-off from inventory - a transaction created when a product is written off from inventory. The transaction amount is equal to the residual value of the product.

## Access

The report on depreciation transactions is available to the project owner and users with "View depreciation transactions" access.

https://roistat.platrum.ru/file/image?id=4d50a224dc76dd288e87a0e9be377cab

## Configuration

The initial depreciation settings are set when creating item categories in the inventory section.

https://roistat.platrum.ru/file/image?id=1fcb54ae4abe09c806326c1ac8f01e01

By default, the depreciation settings have the following values:

- Primary write-off percentage - 20%, meaning that when an item with a purchase cost of 4000 is added, its residual value will be calculated as 4000 - 4000\*20% = 3200.

- Minimum residual value percentage - 10%, indicating the minimum threshold below which the residual value of the item cannot fall. In the example, the residual value of the item cannot be lower than 320.

When adding items, it is also necessary to specify their useful life. If this value is not specified, the entire cost of the item will be written off immediately. This is suitable for cases when you add consumables. However, if you purchase equipment or furniture that will continue to serve and potentially can be sold, it is better to specify the useful life.

## Transaction list

All transactions are displayed in a single list on the "Depreciation transactions" tab.

https://roistat.platrum.ru/file/image?id=04b7db760577273900a8d7fff5f1eb06

All transactions can be grouped by:

- Categories

https://roistat.platrum.ru/file/image?id=c1d2b6a5dbac61adc16e45d87b818879

- Months

https://roistat.platrum.ru/file/image?id=c852e24412731b119abe6b313e0f1a84

Transactions can also be filtered by:

- Product categories

- Name

- Write-off amount

- Residual value

- Remaining useful life

- Creation date

- Transaction type.

The specified filters will help sort transactions and, for example, find items that will soon expire in order to conduct inventory and update their status, or plan replacements purchases.

# Binding items to employees

To always know who is using a particular item during inventory, you can assign them to employees. To do this, activate the "Enable binding items to users" checkbox in the project's general settings under Warehouse -> Binding items to users.

## Default Responsible Person

When you activate the binding of items to employees, you will have a field to select the default responsible person. This can be the project owner, the head of the administrative department - an employee responsible for company assets.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003745281/original/PAUY953-bMLpIx0trwLop8IYnSCDic5wNw.png?1646165878

The idea is that you can't have assets for which no one is responsible. And until an employee is assigned to an item, the warehouse manager will be displayed as the default responsible person.

To assign one item to one employee, it must have its own inventory number. If you add a batch of tables with the same inventory number, you will be able to assign all 20 tables to an employee, instead of assigning them one by one. So you either need to add all items one by one or use import.

## Automatic Inventory of Items

If you enable binding items to employees, you will have access to the automatic inventory setting.

The essence of it is that once in a certain period of time, all employees assigned to an item will be shown a window where they must indicate whether they have this item in their possession or not.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003745280/original/Cfbsiz4KxnNqrHUYgasC1sylaMkMW2oLFg.png?1646165877

Until an employee marks all items assigned to them, they will not be able to continue working in the project.

If an item is marked as missing, it will be highlighted in the list of items as problematic. Additionally, you can use the filter to view only items with problems.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003745284/original/5egVjqXZEmZrVS8GnRwTD62-olN6w9vOjQ.png?1646165879

If after checking everything is fine with the product, the administrator will be able to change the status in the product card by hovering over the exclamation mark. The status also changes if the person responsible for the product is changed.

Additionally, the person responsible for the products by default will receive a notification on their desktop about the presence of problematic products. Clicking on the link will open a page with a list of all problematic products.

Questions and problems related to payment:

General information about tariffs can be found on the website (https://platrum.ru/price/) and in personal accounts on the "Tariff and Payment" page.

Unable to make a payment (the suggested payment methods are not suitable):

In this case, please write to us, we will definitely help you. You can write to us using the chat widget, or if you are on the documentation page, through the feedback form (in the upper right corner).

You paid the invoice by mistake and want to get a refund or change the license parameters:

In this case, please write to us, we will definitely help you. You can write to us using the chat widget, or if you are on the documentation page, through the feedback form (in the upper right corner).

Is it possible to add users to the license after payment?

Yes, you can always add users to the paid license by simply paying for them additionally. An active license will have a corresponding button, by clicking on which you can select the desired number of users to add and make a payment by card or download an invoice. The amount will be calculated taking into account the remaining duration of the license.

Can I change the tariff after paying for the license?

Yes, you can change the tariff with an already paid license. In order to do this, please write to us, we will definitely help you. You can write to us using the chat widget, or if you are on the documentation page, through the feedback form (in the upper right corner).

When calculating the cost of a new license, we will take into account the remaining duration of the current one and, accordingly, reduce the total invoice amount.

## Can I not pay for users who don't log into the project?

If the number of users in the license is fewer than the actual number of users in the project, the "extra" users will be automatically disabled (they won't be able to access the project).

You can manually manage user disablement on the "Employees" page in the "Company" section. On this page, you can disable, for example, employees who are simply listed in the structure but don't use the project (such as laborers).

## How do the limitations of the free plan work?

In addition to the maximum number of users, there are two types of limitations: monthly and overall. For example, you can create up to 20 requests in financial planning per month, and regardless of the period, you can create a maximum of 25 articles in the project's Knowledge Base. When you reach these limitations, the project will not be locked, you simply won't be able to create new articles, requests, transactions, etc. (depending on where the excess occurred).

# Tariffs

This article provides more detailed information about tariffs in Platrum.

## Our rates can be found on our main website on the "Pricing" page:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73014579504/original/qygyTxN\_RTrL3lVqdQB2XcS3v2OsMZ4vTg.png?1656590548

The tariffs in our project are divided into 4 categories:

- Free - the starting tariff, on which you can test our system.

- Starter - a tariff for a small company that prioritizes the need for a Knowledge Base and an Academy.

- Basic - a tariff for a larger company that needs unlimited access to all our tools.

- Pro - a tariff that allows you to fully customize our system for your brand using Branding and also ensures that your data won't be lost, with backup of all data to email.

You can choose the tariff that suits you best.

## Users in the tariffs

Each tariff includes a certain number of users:

- Starter - 5 users.

- Basic - 10 users.

- Pro - 20 users.

If you need additional users, you can purchase them. Prices for additional users per tariff:

- Starter - 250RUB

- Basic - 500RUB

- Pro - 990RUB

When purchasing a tariff for 6 and 12 months, you will receive a discount of 10% and 25% respectively.

## Limits

Each tariff has its own limits or restrictions. Each tariff is unique, which is why the limits on tariffs differ.

Limits are calculated for the last 30 days.

## Free

This tariff is assigned to a project upon the first registration on Platrum. It is designed for you to get to know our service in more detail, to "get a feel" for it. With the free tariff, you can do the following without any restrictions:

1. Create the structure of your company to see the advantages of working with Platrum. We recommend creating test users (you can have up to 5 active users at the beginning).

[Image 1](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003746393/original/wZS9NYEHp71WAPiIovpCMIUP0Yh-ROJDuQ.jpeg?1646166837)

2. Create and fill in metrics for tracking the performance of your own and your subordinates' or company employees' work.

[Image 2](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003746375/original/nMqrNhrpULrJupLjV8B9iShAzB3z0ibtrw.png?1646166827)

3. Create dashboards for easier interaction with metrics.

[Image 3](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003746379/original/AfgD6AGOdCTu6B9WNUxYvdfAfGGZYGfmKQ.jpeg?1646166827)

4. Test our Task Manager, which simplifies task assignment to your employees (you have access to up to 100 tasks per month at the beginning).

[Image 4](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73014614114/original/QQPmVw30v7LAiq6OOtX6sZhq0\_CntK2rsg.png?1656602695)

5. See how convenient it is to maintain your knowledge base for storing and publishing information within the company (you can create up to 20 articles at the beginning).

[Image 5](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73014614135/original/fSFdKpGtP8QEAStaSUfkNBhWO1O5P1WySA.jpeg?1656602702)

6. Based on the articles in the Knowledge Base, you can create courses for monitoring employees' knowledge - create tests and exams within the course (you have access to up to 5 courses at the beginning).

[Image 6](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73014614129/original/EAf8tsGAMjLp6JOo17SqQNAD4VB34BJMag.png?1656602701)

7. Here you can track your receipts/expenses/transfers within the company. You have access to up to 50 transactions per month at the beginning:

- 20 income transactions;

- 20 expense transactions;

- 10 transfer transactions.

[Image 7](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73014614127/original/tf7CTUiCPnaBY8\_UNHqMRlrQacgsap\_nQg.png?1656602701)

8. You can check how convenient it is to plan your budget in Platrum (At the start, you have access to up to 20 requests per month).

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73014614131/original/fHAs8lobn9ueFjol2GHf1FwGbvTHIlgDlw.png?1656602701)

9. Here you can control the accounting of office equipment, its procurement, and depreciation (At the start, you have access to up to 50 items).

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73014614128/original/X52l7jkutmS5nugbNFQSdFDNTfjAzqSHNA.png?1656602701)

10. With our Google Chrome extension, you can check your employees for errors and inconsistencies in their work with other CRM systems (At the start, you have access to up to 50 checks per month).

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73014614130/original/\_QDDZnzgGTErSVoCNT1YIO7aPzsVaoDl4A.png?1656602701)

11. You will be able to familiarize yourself with our password manager, where you can store all the access to your project or company in one place, without worrying that they will fall into the wrong hands (At the start, you have access to up to 50 passwords).

## "Starter" Plan

This plan is suitable for small companies that are just starting their journey in the business sphere. For such companies, a plan has been developed that includes everything from the previous plan (Free), but also fully unlocks the following features:

### Tasks

Here, you can assign tasks to your employees without worrying that they will be forgotten, lost, or not completed. You will be able to track the work of your employees in one convenient tool. And with the Starter plan, you can do this without any limitations.

### Knowledge Base

This tool speaks for itself - having your own knowledge base in the company is essential to make it easier to train new employees, familiarize them with your rules and regulations, and help new employees integrate into your team faster. It also allows you to store important commercial information that may be forgotten or lost, but in the knowledge base, everything is located in one place and will never be lost.

### Academy

With this tool, you can not only train new employees by using articles from the knowledge base but also control their knowledge by adding test questions or even full exams with open-ended answers to the courses. This way, you can be sure that employees are familiar with the information and have absorbed what they have read.

## "Basic" tariff

This tariff is suitable for larger companies that need to manage their finances effectively and plan their budget. With the growth of employees, it is also important to control equipment depreciation and have a unified space for storing access to important external resources. It includes all the tools from the previous tariffs (Free and Starter), but additional restrictions are completely removed from these tools:

### Financial accounting

This tool allows you to conveniently and accurately track all financial transactions within the company. With it, you won't make mistakes with the amount of expenses or income, and you will have a clear picture of your business:

### Financial planning

Here, you can control all expenses that need to be approved only through you (By creating an approval chain, you will see all company expenses, and you will make the decision whether to approve them or not). You can also plan future expenses to have a clear understanding of how these expenses will impact your business:

### Warehouse

This tool allows for more convenient inventory management, so you can see all your products in one place and also account for depreciation (Because nothing lasts forever, and everything wears out). With it, you will clearly see what has become outdated and timely update your company's assortment or office equipment:

### Quality control

A very useful tool for monitoring employee work on the internet. For example, how your employee responds to customer questions, whether they greeted the customer, whether they addressed them correctly, etc. It is necessary to control and check all of this, and if you value the quality of work performed, our Google Chrome extension will make it even easier for you:

[link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003746367/original/G4igi7aSJI5oJXyU1ZYRgzG7QVFp61dzig.png?1646166825)

With our extension, you can track the quality of an employee's work, either by rewarding or penalizing them. Seeing clear statistics, you will make decisions on whether to penalize or reward the employee.

### Password management

Surely, you have encountered a problem when your company grows, so does the number of services you interact with (For example, e-wallets, CRM systems, social networks, and much more). And you need to store access to all these places, but you also need a secure and centralized space to do so (To prevent your access from being stolen or lost). With our password manager, this problem will be solved, as all access will be under our reliable protection and in one place, accessible only to you:

[link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73003746384/original/IbhhEJFdS8XpSNXjAPwUWlnvtuijY33WuQ.png?1646166828)

You simply need to remember your "Master password" - the password for the folder where your credentials will be stored. It cannot be recovered or hacked. We advise you to write it down to avoid forgetting it, otherwise all passwords will be permanently lost.

You can also group your accesses by themes, so that everything is not in one place.

## "Pro" Plan

This plan is designed for large companies that value status and branding. For such companies, we have developed a plan that allows you to customize our system to your brand, as well as not worry about data loss - all data will be periodically saved and sent to your email, so that you can recover them in case of accidental deletion. Additionally, if you are concerned about security, you can restrict access to your project by IP. Let's consider the advantages of this plan in more detail:

### IP Restriction

This feature is useful for companies concerned about the security of their data. With it, you can make it so that only specific IP addresses (for example, your office IP) can access the project. This way, employees will only be able to work with Platrum from your office.

### Branding

With this functionality, you can set up your project on your own domain, making it easier for employees to interact with the service. You can also customize it by changing the company name and adding your logo, which will be displayed in the browser bar:

[Logo example](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73031444155/original/atJaLdT2raTVALN8-J1\_iT0lhIaX\_alZmQ.png?1668415869)

### Periodic Data Backup with Archive Emailing

This feature is designed to ensure that you don't worry about losing your data. For example, if an employee accidentally or maliciously deletes all data from your project (such as all articles from the Knowledge Base, all courses from the Academy, or all Employees). This will no longer turn into a big problem where you have to manually recover the data. Simply send the archive you received to our support for the restoration of all lost data.

Backups are sent once every 30 days, and they will be contained in the archive file in JSON format.

### Priority Support

Technical support is available on all paid plans of our service. But here, you will have a dedicated manager attached to you for quick and convenient resolution of any issues, questions, as well as for implementing service improvements that will be convenient for you.

[Priority Support](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73031444283/original/QCvqIniaMmnxaxoL5ET4b\_5dmCsq0Ma1sw.png?1668415957)

## FAQ

Here are frequently asked questions from clients and their answers:

Is it possible to purchase a tariff for 1 user?

No, the minimum number of users is 5 for the "Starter" tariff.

If I switch from a paid tariff to a free one, what will be the limit on the number of articles in the Knowledge Base?

If you exceed the limit, you will not be able to create new articles and edit old ones, including adding questions to them. However, all articles exceeding the limit will still be available for reading and taking courses on them, they will not be deleted. The same applies to limits in other tools - you will be able to see all the data, but you will not be able to edit and create new ones.

# Business processes

## What are Business Processes used for?

Business processes are a sequence of steps aimed at achieving a desired outcome. Business processes are used to clearly describe the execution of a particular process through steps for an employee, and then monitor the execution of that process. Set up a business process once, and it will be saved for any employee who starts working with a new process. The employee can follow the steps set by you to achieve the desired result.

## Using Business Processes

On the Business Processes page, you can see ongoing processes, the assigner and executor of those processes, the current step of each process, all additional information about them, and the deadline for completing the process if you have set one. On the business processes page, you can filter ongoing processes:

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73026290570/original/XpiH6JSpEiqI3\_z7UXIKXm3kInQYc\_F1zw.png?1664789378)

On the Business Processes page, you can click on the "+" in the top right to start a new business process. You will be able to choose a template to start a new process. With templates, you can quickly start the selected business process without having to write the steps for the process from scratch each time.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73026287451/original/E\_Xwd2EEQpZYwXM8TUqEuQD6E75PpPbd-g.png?1664787404)

After selecting a template, you will need to fill in the fields according to the description and then click on the "Create" button at the top. Let's go through the specified steps using the example of the "Vacancy Hiring" business process:

[Link to image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73026336739/original/XzIZqWLB4Z8geafGb1LrVBOi-RysBr42Ew.png?1664807067)

## Business Process Steps

Once the business process is created, the performer will have steps to complete it. The performer can access the process and see what actions are required to complete it.

In this case, the performer needs to contact the applicant, discuss their candidacy for the vacancy, and agree on the interview date. After completing the actions, the performer can click on one of the corresponding buttons based on the conversation with the applicant.

Suppose the applicant says they are not interested in the vacancy, then we click on the "Decline" button and specify the reason:

[Link to image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73026339750/original/kgjoMUoyUgCK5bin7M-UlJMWaeFGFBxjbA.png?1664807922)

If we manage to arrange an interview with the applicant, we click on "Conduct Initial Interview," specify the interview date, and add a comment if needed:

[Link to image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73026340758/original/Mn-1cP436kzVYcmt\_F2DJEkLOecckyGhug.png?1664808116)

All the specified fields are customizable by you when creating the business process, allowing you to define the exact actions you need in each step.

This way, we go through the steps indicated in the business process.

When all the steps in the business process are completed, the process will be considered closed:

[Link to image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73026292920/original/HHsdz\_sFjSpji1Ks8fHHdcBt0EYYW2YPoQ.png?1664790826)

On the top panel of the process, you can see the initiator, process name, the current step of the process, the deadline for the entire process, process map, and detailed action history.

## Process Completion Date

The completion date of the business process is automatically calculated based on the number of days given to complete all the steps in the business process.

You can change the completion date by clicking on it. Select a new date and click "Apply":

[Link to image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73026348102/original/yWHKICswe1ENovSm3xNL7dybk7fQqAeajQ.png?1664810060)

### Business process map

You can view information about the steps under the name of the business process.

[Image Link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73026342201/original/gP4UAVshpUX5jGUzCScUbGyvjjD\_YuPLEA.png?1664808460)

If you need more detailed information about the steps, you can open the process map, where you will see all the steps that can be taken in the process in case of approval/rejection.

Completed steps are marked with a check mark, and the current step is shown as a rotating target. If necessary, the process map can be expanded using the arrow button in four directions.

[Image Link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73026346168/original/pLZ1bAylG84b9xlBktOfRta1gZpgfDG2bQ.png?1664809489)

## Action history for the process

On the right side, you can see the action history for the process:

[Image Link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73026341072/original/ybd8G-iqYGb4BsEYgXjnQmIsyY0Bq2Z79A.png?1664808210)

If you need more detailed action history, you can click on the clock icon in the top right corner:

[Image Link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73026347050/original/DvH5y2nwT5mVtEaYT3zC3tvx6Dql2filzw.png?1664809750)

The action history displays actions related to the process and actions related to filling in fields. There are 2 filters at the top for you to see only the relevant information about the process:

[Image Link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73026347439/original/Vm0StwjchC3-ezXU33F498vbJImIsJG-bQ.png?1664809866)

## Creating a subprocess

When executing a business process, it is possible to create a subprocess. In this case, all the necessary fields for starting the subprocess will be opened in the process. The fields need to be filled out, after which a new business process will be created.

[Image Link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73026352716/original/Ddb7Hz7vA10Ybo6UIDQ9sFRFwlgxHJB-WA.png?1664811478)

## Business Process Builder

To create a business process template, you need to go to the Business Process Builder. In the tab, you can see a list of templates that have already been created in the project.

[Image Link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73026359277/original/cbOcmRXWBocpvANdjKFArFZIX-zcbPmOJg.png?1664813854)

## Access to create a business process template

There are 2 levels of access to create a business process template:

- Creating and editing your own business processes - employees will have the ability to create and edit business processes that are created by the employee or their subordinates;

- Administration of all business processes - provides full access to all actions in the Business Processes section.

You can grant one of these accesses in the access settings of your project.

[Access settings](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73026361221/original/Jy6BKmEXoHwUVQBV10Ay9LwCuxSp\_gcKMw.png?1664814481)

### Creating a business process template

To create a business process template, you need to go to the "Business Process Builder" tab and click on the + in the top right corner of the page.

This will open a page with the business process settings:

[Business process settings](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73026375164/original/bt9EubtiD6JqzCspVq8fc8M6\_rvp9rvGxw.png?1664819338)

On this page, you can edit any actions and steps to customize the business process to your team's tasks.

In the Process Information field, you can enter the process name and parent process, if applicable.

The parent process is the process that precedes the current child process being created.

For example, the parent process could be "Vacancy Approval" with the subprocess "Hiring for the vacancy".

In the Process Entity field, you can add entities that you will need when going through the process steps. You can learn more about entities in the Process Entities section.

[Process Entities](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73026375820/original/BW2PWm5PkJ4Tm6477F6Bq5Fy2hvKcW4ZRg.png?1664819599)

Below, you can add process steps. The fields are customizable based on your specific task.

For example, you need the employee to conduct an initial interview with the candidate. You specify the step name, in this case "Initial Interview".

To conduct the interview, you need to schedule a date and time with the candidate and optionally leave a place for the employee's comments. In the field on the left, you indicate the name of the information field. And on the right, you choose the field type. In our case, we need a date and time field.

You can mark a field as mandatory if the information is required to complete the process.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73026378432/original/knY9qPWkUlj-pn5daP5zTlQt0mVJo9oHMQ.png?1664820529)

You can add an assignee in the step information who will be responsible for the current step.

In our case, one employee schedules and conducts the meeting, so we choose "Assignee from the previous step who completed the step".

You can choose any responsible option to customize your process as flexibly as possible.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73026378631/original/cXORyt8WSlZe2B6ei3KlapQJtPrZZ66HoA.png?1664820599)

Add a description for the assignee to explain what step they need to take.

You can specify the displayed entities or fields from the process.

For example, in our process, we have the employee's last name, first name, middle name, and resume. We can display all fields or just one - the resume.

In the step deadline, you specify how many days, hours, and minutes the assignee has to complete this step. The countdown starts from the moment of transitioning to the specified step.

If you don't want the assignee to be able to change the step's deadline, you can uncheck the "Can be postponed" checkbox on the right.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73026379603/original/WJfOBljSwJMHFsuBbkHD9I8IrSKW1i9URA.png?1664820891)

If the process is completed at this step, it can be considered "Completed at this step". Then, when transitioning to the current step, the process will be automatically considered completed.

Next, you need to consider what results can be achieved at this step.

In our case, we can reach an agreement with the candidate and proceed, or we may not agree on certain issues, which will result in rejection.

For example, if the candidate is accepted, we can indicate "transition to the specified step" and specify on the right which step the performer will move to. For example, we will need to indicate the candidate's exit date.

If no further additional information is needed and hiring a candidate will lead to another process, then select "open a child process" and specify which process needs to be opened.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73026381396/original/qMI2szUpZ0-X5R8lmdHyONOaXJdIFUHJnQ.png?1664821480

For example, if the candidate declines the offer, we will write the option "Rejection" with opening the next step, where the performer will indicate the reason for the rejection.

All steps and processes are defined by you and can be selected in other steps of the process.

When you finish creating the process, click on "Create" in the top right corner of the process creation page.

## Business Process Entities

Business process entities are needed so that you have a template with fields to be filled in by the process performer. The template can be shown at any step of the process.

For example, if you have several processes where customer data needs to be filled in, you can create an entity called "Customer" and add fields for filling in the business process.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73026386183/original/4PN9\_cCGMXqVfzWByGy-rKcw1-xxWmGTdA.png?1664823118

Thus, when selecting the "Customer" entity, you will now automatically see the fields: first name, last name, middle name, and phone number. This will save you time on entering the same fields.

Entities can be customized based on the needs of the business processes in your organization.

The entity can be displayed in two ways:

- Everywhere - it is displayed in all business processes that use the current entity. This field cannot be edited in the business process constructor. Any changes made to it will be applied to all its copies.

- In a specific process - it is displayed only in the context of business processes that use the current entity, in which the field is created or to which the field is attached. This field cannot be used in business processes to which the field is not attached.

After filling in the entity, click "Save" in the top right corner of the screen.

# Business Process Constructor

To create a business process template, you need to go to the business process constructor. In the tab, you can see a list of templates that have already been created in the project.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73028105990/original/rCVxb92WErPbJLplFupqcfxifULUpW1mMQ.png?1666086077)

## Permissions for creating a business process template

There are 2 levels of access for creating a business process template:

- Creating and editing own business processes - the employee will be able to create and edit business processes that are created by the employee or their subordinates;

- Administering all business processes - provides full access to all actions in the Business Processes section.

You can grant one of these accesses in the access settings of your project.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73026361221/original/Jy6BKmEXoHwUVQBV10Ay9LwCuxSp\_gcKMw.png?1664814481)

## Creating a business process template

To create a business process template, you need to go to the "Business Process Constructor" tab and click on the + in the top right corner of the page.

You will be directed to a page with business process settings:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73028114145/original/UwRiVLDJdlaZeCtcc6C7dh4FPHVAyYPMrA.png?1666091391

On this page, you can edit any actions and steps to customize the business process for your team's tasks.

In the Process Information field, you can enter the process name and parent process if applicable.

The parent process is the process that precedes the current child process being created.

For example, the parent process "Vacancy Approval" with the subprocess "Hiring Request".

In the "Process Entities" field, you can add entities that will be needed when going through the process steps. More information about them can be found in the Process Entities section.

Below, you can add process steps. The fields are customizable to your specific task.

For example, you need the employee to submit a vacation request, specifying the desired vacation dates and reason.

In this case, you add three fields: vacation reason, start date, and end date. All fields can be customized. If you have any other data required for vacation approval, you can add them.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73028115396/original/5ZwhixoAngDr5dd6QDkWunzpsZghDY9veQ.png?1666092209

To ensure that the employee does not add unnecessary information, you can configure the type of each field:

- String - brief information on the topic, fits in one line;

- Text - detailed information is required;

- Number - employee needs to provide a number. For example, print run size;

- List - the employee will need to choose only one option from the list.

- Date - specify a date;

- Date and time - specify a date and time;

- Attachments - can attach a file;

- Users - can select multiple users from the project's employees.

- User - you can select one user from the list of employees in the project.

The field can be marked as mandatory if the information is necessary for the process to proceed.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73026378432/original/knY9qPWkUlj-pn5daP5zTlQt0mVJo9oHMQ.png?1664820529)

In the step information, you can add an executor who will be responsible for the current step.

In our case, the employee submits the request, and the supervisor of that employee approves it in the next step. Therefore, we choose "Supervisor of the executor from the previous step who completed the step".

You can choose any responsible person to configure your process as flexibly as possible.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73026378631/original/cXORyt8WSlZe2B6ei3KlapQJtPrZZ66HoA.png?1664820599)

Add a description for the employee's supervisor to explain what actions they need to take.

You can specify Displayed Entities or fields from the process.

For example, in our process, we have a reason for leave. We can display it in the step or hide it.

In the step deadline, specify how many days, hours, and minutes the executor will have to complete this step. The countdown starts from the moment of transition to the specified step.

If you don't want the executor to be able to change the deadlines for completing the step, you can uncheck the "Can be postponed" checkbox on the right.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73028115922/original/asXiPHnV7Y\_xMdsw1bPGSiAGmG-0hmdrpA.png?1666092500)

If your process will be completed at this step, you can "Consider the process completed at this step". Then, when transitioning to the current step, the process will be automatically considered completed.

Next, you need to consider what outcomes can be achieved at the completion of the step.

In our case, the supervisor may not approve the employee's leave, so we need to consider a scenario for denying the leave.

For this, it is better to create a separate step in the process, and when transitioning to it, the task will be completed.

Suppose the vacation has been approved, then we can indicate a "transition to the specified step" and specify on the right to which step the performer will transition. For example, vacation approval by the HR department.

If no further additional information is needed and another process will follow the hiring of an employee, then we will select "open a child process" and specify which process needs to be opened.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73028116118/original/K\_k7\_wZeELCJJ5ignnD-oIb\_oPpevEiLMQ.png?1666092613)

All steps and processes are defined by you and can be available for selection in other process steps. There is no single flexible setting for all processes, you customize each step to fit your tasks.

When you finish creating the process, click on "Create" in the top right corner of the process creation page.

## Business Process Entities

Business process entities are used so that

you have a template with fields to be filled in by the process performer. The template can be shown at any step of the process.

For example, you have several processes where client data needs to be filled in. You can create an entity called "Client" and add fields for filling in the business process.

[Image](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73026386183/original/4PN9\_cCGMXqVfzWByGy-rKcw1-xxWmGTdA.png?1664823118)

Thus, when selecting the "Client" entity, you will now automatically see the fields: first name, last name, middle name, and phone number. And you will save time by not having to enter the same fields repeatedly.

Entities can be customized according to the needs of the business processes in your organization.

An entity can be displayed:

- Everywhere - displayed in all business processes that use the current entity. This field cannot be edited in the business process builder. Changes to it will be applied to all its copies.

- In a specific process - displayed only in the context of business processes that use the current entity, in which the field was created or to which the field is attached. This field cannot be used in business processes where the field is not attached.

After filling in the entity, click "Save" in the top right corner of the screen.

## Webhook

A webhook is a mechanism for notifying various systems about specific events. In Platrum, you can use webhooks to send data about business process steps to other services that support webhooks, to your website, or to your email.

For example, let's say you have a process for manufacturing equipment parts. When you complete a production step, you need to contact the customer to notify them. By sending a webhook to your CRM system, all the information about the completed work will automatically be added to the deal.

### How to set up webhooks?

You can add a webhook in the business process builder when choosing an action button. Select a name for your webhook and choose the option "Send webhook".

In our case, the webhook will be sent to an electronic document management service, where a task to create a vacation order will be automatically generated.

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73030678895/original/WnTn02QFRXcWVwBDEGTpLcxRVEjz8CtnGw.png?1667891660

In the last line, you need to add the link that will be generated after setting up the webhook.

If your developer is setting up the webhook receiver, they will provide you with the address to send it to. If you are using special integration services, they will provide you with a URL during the setup process.

You can also order a turnkey setup service for the tool in your business by filling out a simple form on the website:

https://platrum.ru/freeconsultation (https://platrum.ru/freeconsultation)

### Examples of use cases

1. You have a product manufacturing process with multiple stages, many of which require interaction with contractors and clients.

You can create a business process based on the steps in your production process. In the steps where communication is required, you can send a webhook to your CRM system to create a task for your employees. For example, to call the client and approve design changes for the packaging.

2. You can configure a business process through which your employees will go on vacation. After the vacation is approved, you can send a webhook to your electronic document management system to create a task for the HR department to prepare a vacation order.

3. You have a business process for approving a discount for a client. When the discount is approved, you can send a webhook that will be sent to the accountant as an email notifying them to issue an invoice to the client with all the details.

# Booking

This functionality is designed for convenient booking of something, such as meeting rooms.

## How to get started?

To begin, you need to set up the spaces you have. This section can be found in the settings:

[Image Link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73008946930/original/fPbmeT-a82wX9kMtgxTw7oVzJqbiquztPg.png?1651847599)

For example, you have 3 meeting rooms. Create a space and fill in all the necessary fields:

[Image Link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73008946993/original/8iucF4dDlib0Xd6nilgMnzPbapZdA9Gxxw.png?1651847626)

After adding the meeting rooms, you can add them to a category by creating it in the corresponding section:

[Image Link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73008946995/original/2VmG3MP4zhAWfg3vdce8paHLcXUaLgQ8PA.png?1651847627)

Important: Make sure you have opened this section in the settings:

[Image Link](https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73008946994/original/sdlkstLaixOpTI0Z-Eayphn5NoE8gC6xjA.png?1651847627)

## How to make a reservation?

Any employee can go to the section and book the necessary meeting room. To start, click on the desired room's time slot:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73008946996/original/x8v9UfdfPL4BjTfk\_ezwbEhU5nMBgeoEdw.png?1651847627

To extend the time, drag the cell:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73008946999/original/9qdzn6ioDc9yjjiXWV82OhekBl4aLYPlWg.png?1651847628

For convenience, you can expand the room window to book for another day:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73008947000/original/YquYOeGMA6yxUQ\_-w2BCRUl\_Oo9qhA2nCg.png?1651847628

To delete a reservation, click on it again:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73008946998/original/bCcWsyH1q2JMYKLsjmncHsStb7FzqznDog.png?1651847628

Important: historical data cannot be deleted. That means if the reservation time has expired, the record cannot be deleted.

If you find it inconvenient to use the calendar view, you can open the booking window:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73008946997/original/ZFTR9S1ueAGV7KzbnOCqZatKPN9KBqG70w.png?1651847628

Here, in a more convenient format, you can select the desired time and see which meeting rooms are available at that time.

## Access

This section is available to all company employees. To configure the section, you need to have the appropriate access:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73008946991/original/G4CpnYv2fpfDogABfv4-JyJOsfn7qIHljQ.png?1651847625

# API

The API in Platrum is used for individual system configuration. You will be able to configure Platrum as you see fit. For example, you can create transactions, invite users, or set tasks.

If you need to configure any automation or integration with your other systems, the API Platrum (http://api.docs.platrum.ru/) can also help with that.

## How to get an API key

To work with your project via API, you will need an API key. You can find it in the "Settings" -> "Project" section in the API key field.

The API key is only available to the project owner. An invited employee will not have access to the key. In this case, they can make API requests using their session\_id. You can find it in the browser's Network tab.

In this case, an employee working with the project via API will only have access to the data available to them in the project. If the employee uses their session\_id as an API key and makes a request to the data they do not have access to based on their settings, they will not be able to retrieve them, and the response to the request will be "permission\_denied".

Important:

If you, as the owner, pass your API key from the project settings to someone else, the data cannot be restricted in any way, as the system sees such a request as being made by the project owner.

Therefore, do not give your API key to third parties.

With an API key, any action can be performed in your project on behalf of the owner, which can cause harm to you.

## If the documentation is incomplete

The documentation for working with the API is still being filled out, so it may not include descriptions of some methods.

If you cannot find the description of the method you need in the documentation, you can view its format in your browser's console.

If that is not enough,

contact us through the chat widget or by email

support@platrum.ru, (mailto:support@platrum.ru,)

our employees will forward the question to the product developers, and we will help you figure it out.

# Creating and installing a plugin in a project

## What is this article about?

Platrum supports the ability to create custom plugins (modules) with various functionality and install them in any project. Here we will explain how it works and how to create or order your own plugin.

## What can be done with a plugin?

The plugin can make minor modifications to the interface or create a separate tool based on Platrum. The plugin uses the Platrum API and has access to the data of the project in which it is installed (only the project administrator can install the plugin), so it is easy to work with both the current data from the project (users, requests, transactions, etc.) and add your own data and entities.

For example, below is a plugin that adds the "Events" tool:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73009334397/original/Sjpa3OdTBfftel9JiYVgD8YcruYIObXg\_A.png?1652275804

In short, this plugin allows you to add a separate section with its own functionality to your project. The "Events" tool allows you to create a calendar of events in your company, schedule meetings, and inform colleagues about internal team-building activities, and so on.

You can customize the plugin yourself, as it is available in open access (https://github.com/platrum/plugin-example), or you can contact our support team and suggest your ideas for its improvement. You can also create your own plugins from scratch.

## How to add a plugin to a project?

In this repository (https://github.com/platrum/plugin-example), you will find a complete guide on how to create and implement a plugin in your projects. After you have created your plugin, you can upload it through the settings:

https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/73009334396/original/vf0rgqfpKKzaoh\_G1dw6EcP7V\_yYCwEYyw.png?1652275804

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# Functionality overview

## Introduction to the Management Automation Service

[Introduction to the Service]((https://www.youtube.com/watch?v=RF6WAqu1BL8))

### Opening Words

[Opening](https://www.youtube.com/watch?v=RF6WAqu1BL8&t=0.0s)

Hello, everyone. My name is Eugene, and I'm the Product Director of Platrum. In this video, I will provide a brief presentation on our service and demonstrate its key features and capabilities. We'll start with the company structure. I believe it goes without saying how critical organizational design is for building a successful company. Everyone interacts with organizational structures in one way or another. With Platrum, you can easily create a comprehensive, up-to-date company structure that shows all interrelationships.

### Company Structure in Platrum

[Company Structure](https://www.youtube.com/watch?v=RF6WAqu1BL8&t=28.0s)

The structure builder allows you to define any hierarchy and chain of command. You can name each organizational unit and position exactly as they are called in your company. You can also clearly set an end goal for each sub-unit. You may be surprised to discover how employees' understanding of these end goals can sometimes differ significantly from what you actually expect from them. The finished structure can be easily printed out, for instance, to hang on a wall, or exported to be uploaded to another project. In addition to the standard fields, you can add your own, like job responsibilities for each position so that employees can quickly find who to turn to for various issues.All changes are saved in the version history, allowing you to revert to a specific version if you accidentally make any unwanted changes. Placing an employee in a position or removing them can be done with a single click. Additionally, you can tag an employee for a specific position as being "on probation." Upon first entering the project after deleting the demo data, you can choose a structure from a preset template, so you don't have to build one from scratch. While templates are not obligatory, we recommend choosing one that closely resembles your current structure to minimize editing.A powerful feature of Platrum's structure is its access control mechanics. There's a standard access setting for each employee, where you can set administrative permissions for various tools. For instance, permissions to edit the structure. These permissions are typically granted to a few. But the bulk of system access—like access to regulations, training courses, task boards, types of expenses, and so on—is determined by the structure. You grant access to all necessary materials and sections at the position and department levels, greatly simplifying administration.

### Project Administration

In a real-world company, new documents, courses, checklists, and processes are continually being added, and employees come and go. It becomes extremely challenging for each individual employee to maintain an up-to-date set of access permissions. This issue is non-existent in Platrum. We will delve deeper into this mechanic when we explore other tools later on.

### Employees and Anniversaries

[Employees and Anniversaries](https://www.youtube.com/watch?v=RF6WAqu1BL8&t=173.0s)

The structure is just part of a larger company section, which also includes a portal with employee profiles. You can add various custom fields to these profiles to capture essential information. For example, you could add a field for the city to indicate an employee's work location if you have multiple offices in different cities. Additionally, it's easy to add one or several employees at once, remove employees, disconnect them from the current plan, view all previously removed employees, and so on. There's also an Anniversaries tab, which is a simple but very useful tool for your HR specialists. This tab makes it easy to keep track of upcoming significant dates for each employee. Right now, it displays birthdays and work anniversaries. Employees always appreciate timely congratulations from the company. All events are sorted in a way that puts the closest events at the top of the table. For example, we can see that an employee, Dmitry Timokhin, will have his two-year work anniversary on July 31.

### Metrics and Their Capabilities

[Metrics and Their Capabilities](https://www.youtube.com/watch?v=RF6WAqu1BL8&t=240.0s)

Continuing on the topic of structure, we move to an integral aspect of company management: the metrics tool. With this tool, you can define key performance indicators (KPIs) for each role and department. I believe we all understand that management should be driven by metrics rather than by intuition. Right now, we're looking at the manager's dashboard, but first, let's discuss how to add metrics. You can set an unlimited number of metrics for each position directly within the structure. The hardest part is identifying the KPIs; adding them to Platrum is straightforward. Each metric has a few basic settings. Besides the basic title and description, you can also specify whether the metric is an inverse one. This is useful for metrics where a higher value is worse and a lower value is better, like expenses. Such metrics will be displayed slightly differently. We'll see how this works shortly.

You can also set an interval for the metric. The interval can be daily, weekly, or monthly. This is the time frame within which you will need to input the metric values, either daily, weekly, or monthly. Metrics can also be dual, which is useful if you want to see two indicators on one chart, like revenue and expenses, for exampleTherefore, we create specific metrics for each role. Every employee can see their metrics on their dashboard, where they enter the values. Managers can see information for their direct reports on their own dashboard. The system even alerts them to any existing issues. If you wish, you can also navigate to any of your subordinates' dashboards to view metrics related to their direct reports, and so on.For each period, you can enter both planned and actual values. Planned values change color based on the percentage of completion. For example, here we see that plans turned yellow and then turned green when we started achieving over 90% of them. A trend line is automatically generated for the last four periods to show the overall trend. Sometimes metrics can fluctuate, making it hard to understand the overall picture. Metrics can also be viewed for any historical period, or, for example, in an average mode. Additionally, a comprehensive report is available that shows problematic periods, maximum and minimum values, and other data.

### Dashboards

[Dashboards](<https://www.youtube.com/watch?v=RF6WAqu1BL8&t=383.0s>)

Using metrics, you can create a dashboard for quick analysis of key performance indicators. For example, if you're a department manager, you can set up metrics for your subordinates according to your process flow and quickly identify bottlenecks. You can add an unlimited number of widgets to the dashboard and sort them in any order. For each widget, you can set dimensions and specify how many widgets should be displayed in a row. You can also display interface elements from other systems on the dashboard. For instance, here we see a part of some report displayed in a Google Sheet. This is useful for aggregating all the data you want to see related to your process, even if that data is not stored in Platrum.Dashboards are very convenient to display somewhere in the office to show results to employees. And for each widget, you have the option to hide the scale, so you can show overall trends without sharing confidential data with all the company employees. Of course, you can also provide access to the dashboard you've created. You grant access based on roles, and employees in those roles will be able to see your dashboard.That concludes our discussion of Platrum's basic functionality, and we can now move on to other tools.

### Working with Tasks, Boards, and Plans

[Working with Tasks, Boards, and Plans](https://www.youtube.com/watch?v=RF6WAqu1BL8&t=462.0s)

Let's start with task management. With this tool in Platrum, you can organize collaborative task management within your company. Of course, here you can create task boards and arrange both personal and team work using this tool. The boards are highly customizable to fit your objectives. You can create as many columns as you want, specify any sort and appearance for the cards. Access to the board can be granted either by role or to a specific employee, and of course, there are multiple levels of access.On the main task page, you will find a calendar for daily planning of your schedule. In the calendar, you can place, modify, complete, move tasks and meetings. All of this is synchronized with Google Calendar, which allows you to easily manage work across multiple calendars. To the right of the task calendar, you will find several system columns with tasks that require your attention. For example, if you've assigned a task to someone and can't remember where to find it, you will always see it in the columns for assignments. If a task had a deadline, it will be in the columns for tasks with deadlines; if without a deadline, then in the columns for tasks without deadlines. Of course, if a task in the calendar is overdue, it moves to the task queue and is highlighted in red so that you don't forget about it and reschedule it.You also have access to a task list with various filters for searching and examining tasks from different angles. There is also a handy tool for weekly planning, which allows you to lock in delegated tasks for the week and clearly see each employee's results. With this tool, you'll forget about the issue of an employee not doing the tasks you expected from them. This often happens when we assign tasks in different corporate systems, messengers, email, or orally, and the employee might easily lose track or start working on them in an order that's not prioritized for you. Here, you can easily direct the employee's focus onto the necessary tasks and clearly see completed and uncompleted tasks in the next planning session.At the end of the plan, all uncompleted tasks are highlighted in red, and the employee can fill in a result that points to some reason or intermediate result for why the task is still not done. After formulating a plan, you can approve it so that the employee cannot remove any tasks from it. Meanwhile, they can create their next plan themselves, and all you'll need to do is make minor adjustments and approve it.

### Knowledge Base

[Knowledge Base](https://www.youtube.com/watch?v=RF6WAqu1BL8&t=609.0s)

Now let's move on to tools for knowledge storage, standard operating procedures, and employee training—namely, the Knowledge Base and Academy sections, which are closely linked. First, let's discuss the Knowledge Base. First and foremost, the Knowledge Base is an editor. Here, all the standard functions for text editing are available to you—italics, bold, numbered and bullet-point lists, tables, hyperlinks, and so on. The editor has a block structure, allowing you to move any part of an article without the painful process of copying, pasting, and worrying about layout issues. You can embed a YouTube video into the article or upload your own directly into the project. You can also add an iFrame to, for example, load a Google presentation or attach a file. Conveniently, you can reference another article, employee, or role. Articles automatically generate a table of contents if you use headers. And, of course, each article has a version history, where you can easily restore a required version with a single click.You can also collaborate on a document with your colleagues. You can grant your colleagues access to comment on the document, allowing them to leave their comments or suggest changes. You can organize documents into any folder and section structure. For example, at the top level, we have departments, and within each department, the structure breaks down by division. In turn, within each division, it further breaks down into directions.Continuing on the structure of document storage—there is an access system tied to employee roles. Once you've spent time setting up access, you'll create a system where any new employee, upon being assigned a role, will automatically see all the articles necessary for them. Moreover, if you add new material to a folder assigned to a specific role, the employee will see the new material immediately without the need for you to assign it separately. Although, of course, you can also fine-tune the settings to hide certain articles within a folder accessible to an employee. For example, let's grant viewing access to all employees in the Recruitment and Training department for a specific folder and editing access to the department head.

### Knowledge Base Reports

[Knowledge Base Reports](https://www.youtube.com/watch?v=RF6WAqu1BL8&t=741.0s)

It's worth mentioning a report on all articles that will display documents that no one reads or that have not been associated with questions. The question is used in shaping courses in the Academy, which we will discuss further with you. The report can also show the number of unique views and the number of employees who have access to the article. Finally, a key feature of the Platrum knowledge base is its tight integration with the Academy. In each article, you can add quiz questions that will be used when forming training courses. That is, your own live, up-to-date documents will be used for your training courses. You won't have to maintain two systems, as is usually the case. Questions for the article can be created as either multiple-choice or open-ended, which will require human verification by a trainer specifically appointed by you for the exam.

### The Academy - Why and How?

[The Academy](https://www.youtube.com/watch?v=RF6WAqu1BL8&t=790.0s)

Let's now move on to the Academy. The Academy will allow you to speed up the onboarding process for new employees and simplify knowledge control for current ones. Based on knowledge base articles with pre-created questions, you can create a training course in just a couple of clicks. A course may include steps with multiple-choice questions, as well as an exam with open-ended questions graded by a trainer. The trainer will review each written exam and provide feedback to employees. Trainers have their own intuitive interface where they can see an employee's answers in the exam and indicate whether they were correct or incorrect. If an answer was incorrect, they can provide detailed feedback.For critical and particularly important courses, you can set a deadline for completion, after which the employee's desktop will be locked if they do not complete the course. This is necessary for courses on fundamental documents that an employee must understand before they can work. Additionally, you can enable automatic knowledge checks that periodically create a course consisting of questions on previously covered material for employees. Importantly, the set of questions for each employee will be unique, randomly generated from questions the employee has previously answered. This is useful for maintaining the knowledge level of older employees who may have taken courses a long time ago and may have forgotten some details.Of course, there is also a report where you can see the course progress status for different employees and groups. A key feature is the following mechanism: when questions are added to an article that is already being used in a course, the course will automatically update. Its progress will be refreshed, and all participants who have even already completed it will be notified that new material has been added and they need to return to the course to complete it. Such employees will only need to answer the newly added question, requiring them to become familiar with the new material you've added. They won't have to retake the entire course from the beginning.

### Academy Settings

[Academy Settings](https://www.youtube.com/watch?v=RF6WAqu1BL8&t=907.0s)

Let's now move on to the Academy's settings to understand the benefits this brings. Here you can enable a mode where no one can add an article or make any significant changes without adding a quiz question. And I think many already see the utility in this. If not, let me paint the full picture. First, you create a folder containing rules and instructions specific to a particular job role. Then you grant access to this folder for employees in that role and create a course based on this folder. After that, you activate the aforementioned setting.Now, any manager who makes a significant change to the rules must also add a question related to the new material to the article. This will, in turn, lead to the course being updated and all relevant employees being notified of the new material. A manager or rule editor simply can't make a mistake and update the rules unnoticed. There's no need to send messages in chat groups saying, "We've updated such-and-such rule, everyone please read and acknowledge it." You've invested time once in setting up the right structure, in writing robust rules and concise courses, and then this entire system operates and scales along with your processes automatically. Your employees will immediately be automatically informed about any important additions to the rules and will have to effectively confirm their knowledge by answering a quiz question.

### Finances

[Finances](https://www.youtube.com/watch?v=RF6WAqu1BL8&t=986.0s)

Now let's move on to finances. Here you can conveniently and quickly enter information about your transactions. Both manual creation and import from a file or via API are available. The data you input is automatically aggregated on a user-friendly dashboard, displaying high-level information such as profit, account balances, and breakdowns by types of expenses and revenues. There are also more detailed reports on cash flow, balance reports, and P&L reports with a very simple and flexible constructor that allows you to view the data exactly as you need it. Of course, full multi-currency support is available by default, and you can create transactions in any currency, as well as convert the final values to any currency you need.

I'd like to specifically highlight the report on revenue for weekdays and weekends, which very vividly shows you both the planned and actual values for overall revenue, as well as values for weekdays and weekends. This breakdown is very useful because each month has a different number of working days, making it entirely incorrect to compare month to month, even if it's the same month from year to year.

### Financial Planning

[Financial Planning](https://www.youtube.com/watch?v=RF6WAqu1BL8&t=1057.0s)

Continuing with finances, it's important to discuss a related tool, specifically financial planning. Here you can take control of your company's expenses. The mechanism is very simple. Anyone who should have the ability to request funds for various expenses will have access to specific types of expenses that you set in the settings. For example, the marketing department might have access to expense categories like online advertising, PR, and offline advertising. When an employee needs funds, they create a motivated request specifying the type of expense, the amount, the reason, and financial justification.Then, a chain of approvers, which you determine, reviews the request and decides whether to approve or reject the expense. It's clear that this tool allows for centralized planning of expenses, and also quite simply reduces expenses by rejecting non-optimal, unjustified requests. Furthermore, based on the approved requests, you can input expense transactions, which are immediately created in the finance section. Moreover, you can enable a stricter mode where expenses in your project can only be created if there is an approved request for them.

### Passwords in Platrum - It's Safe

[Passwords](https://www.youtube.com/watch?v=RF6WAqu1BL8&t=1125.0s)

Platrum also offers a tool for convenient and secure password management. Here you can store passwords for various services used by your business and securely grant access to them for your employees. The point is that you will always be able to see how many employees have access to a particular password. Moreover, you'll know how many employees had access to that password, and whether you have changed it since then.The idea is that you give out access to passwords only through this tool. You never drop the password in an email, in a messenger, etc. Passwords are stored in Platrum in encrypted form and are only decrypted in your browser when the correct master password is entered, which you set yourself when creating a password category. This master password is also stored in Platrum, but in encrypted form.This way, no one from Platrum's staff or any malicious actors will be able to access your passwords. But what you will do is significantly reduce the risk of loss, neglect, or theft of passwords for key services and systems that you use.

### Quality Control in CRM

[Quality Control in CRM](https://www.youtube.com/watch?v=RF6WAqu1BL8&t=1180.0s)

To automate the monitoring of your employees' work in CRM and other web systems, you can use our quality control tool. In this tool, you can create verification checklists that designated employees will use to review the work of their colleagues in any web system. This is done through a special browser extension that can be used in any web system.For example, you create a checklist for processing new leads in the CRM. Your employee, by opening the verification panel directly in this CRM on the deal page, marks any violations they find from the list you provided. All checks go into a report, which you can conveniently view in various groupings, breakdowns, find employees with repeat violations, and so on.

### Your Asset Warehouse

[Your Asset Warehouse](https://www.youtube.com/watch?v=RF6WAqu1BL8&t=1219.0s)

Finally, for asset management, there is a warehouse tool that allows you to input data about all your equipment and property and assign it to employees. For example, if you issue a laptop to an employee, you can immediately log and fix this in Platrum. Subsequently, you will always know who is currently in possession of that laptop. For instance, we just sorted through all the equipment that was assigned to me. We see that it's a total of 46 items with a certain residual value.In addition to the ability to assign items to employees, depreciation for each item is calculated. You can always see the total residual value of your company's assets and the amount of monthly depreciation. For example, if we look at the whole company right now, we'll see that we have total assets worth 619,202 rubles. We can also check the average purchase and residual value, both at the category level and for each specific item. For example, we see that our workstations were purchased for 23,000 rubles, but their average residual value is now around 18,000 rubles.Of course, for each item, you can create related documents, record receipts, write-offs, transfers, carry out inventories, and identify missing items. And, as I already mentioned, you can view information on the amounts of depreciation deductions.

# 1 Company Structure

## 1.1 Company Structure: Basic Setup

[Company Structure: Basic Setup](https://www.youtube.com/watch?v=n4hzqgVVGDQ)

### Getting Started

[Getting Started with Company Structure](https://www.youtube.com/watch?v=n4hzqgVVGDQ&t=0.0s)

Good day! In this video, we'll go over the basic fundamentals of setting up and working with the structure in Platrum.So, the initial screen you see when working with the structure in Platrum offers you the option to either choose a pre-made template or import your own structure template. Let me clarify about importing: you can only import a file that you've exported from some other project. In other words, you can't import any arbitrary scheme you've drawn in an external editor. You can only import a template that you yourself exported from another project. This can be convenient, for example, if you have a similar structure in multiple projects.We arrive at this screen after deleting the demo data in the project. This is very important; please make sure that before you start setting up anything in your project, you've deleted the demo data. Once those data are deleted, you'll inevitably arrive at the template selection screen.

### Template Selection

[Template Selection](https://www.youtube.com/watch?v=n4hzqgVVGDQ&t=52.0s)

So, let's try to choose a template. Currently, three possible templates are available. It's worth noting that regardless of the template you choose, you can create any structure. That is, the structure builder is not tied to the initial chosen template. You just need to pick something that is closest or most relevant to your current task. For instance, it's clear that a simple structure template is suitable for very small businesses with a straightforward basic structure consisting of only a few departments. There's no point in creating a more elaborate structure for them. Let's choose, for example, the extended template, which is also included in the demo data.It's important to note that upon choosing a template, the current project owner is automatically set to the top block. If you need to edit this, you can simply remove the current employee from that position and appoint the one who should actually hold it.To recap, in this video, we'll discuss working with the structure, its basic setup, and the primary functions of the structure. I assume that you have already added employees to your project, which, let me remind you, is done via the "Employees" tab. Now you need to set up the structure itself and place employees in their respective positions.

### Interface and Modes

[Interface and Modes](https://www.youtube.com/watch?v=n4hzqgVVGDQ&t=120.0s)

So, what interface do we see here? By default, we are always in the structure view mode. Over here, you can toggle between modes. There are three modes: View, Edit Structure, and Edit Metrics mode. The Edit Metrics mode is covered in separate videos about metrics administration. For now, we will focus on editing the structure itself. In the view mode, you can't interact with the structure; you can only scroll through it to see who holds which position.

### Editing Mode

[Editing Mode](https://www.youtube.com/watch?v=n4hzqgVVGDQ&t=148.0s)

So, let's switch to editing mode.

### Deleting Structure

[Deleting Structure](https://www.youtube.com/watch?v=n4hzqgVVGDQ&t=156.0s)

Before we start interacting with our structure, let's first go over the most basic actions: deletion and export of the structure. You might choose a template and quickly realize that it doesn't suit your needs, and that another template would be a better fit for your actual organizational structure. In that case, you can opt to delete the structure. Of course, only those who have permission to edit the structure can delete it; any employee in your project cannot simply remove it. Here we see that the delete button is disabled, and it says that you must first remove all the employees from their positions before deleting the structure. This is designed as a safeguard to prevent you from accidentally deleting a structure that is already somewhat in use, has employees assigned to it, and other information inputted.

### How to Remove an Employee from a Position

[{How to Remove an Employee from a Position](https://www.youtube.com/watch?v=n4hzqgVVGDQ&t=179.0s)

Let's go ahead and remove our lone employee from this structure. Editing employees in positions can be done in the window that opens when you click on a position. We remove the employee and save our changes. Now, let's try deleting the structure again.

### New Structure

[New Structure](https://www.youtube.com/watch?v=n4hzqgVVGDQ&t=216.0s)

And we're back to the template selection window. Let's choose the extended template again. At the beginning of the video, I mentioned that on the initial template selection screen, you can import your own template, but it has to be in a specific format. To upload a structure template, you must first export it from an already configured project. It is exported along with all its settings, so if you import that template into another project, you will see a fully configured structure.

### Version History

[Version History](https://www.youtube.com/watch?v=n4hzqgVVGDQ&t=246.0s)

Since we're in this submenu, let's talk about the version history. Essentially, it's quite straightforward. After each change to the structure, a separate version is saved, and you can review this history and revert to a previous version at any time. Versions are stored only for three days. The main purpose of the version history is to protect you from accidental changes. For example, if you accidentally delete a department you didn't intend to, or something similar. We assume that in such a case, you would quickly realize that a mistake has been made and could revert to one of the versions saved in the last three days.

### General Structure Settings

[General Structure Settings](<https://www.youtube.com/watch?v=n4hzqgVVGDQ&t=280.0s>)

And now let's talk about the general settings of our structure. In the general settings, we see the name. The name is what appears at the very top of our structure. In this case, it's just "Company Structure." Additionally, there is a setting for the probationary period color. How does it work? Each employee has a small checkmark icon to indicate that they have passed the probationary period. So, if we click on it, we will mark that the employee is currently on probation. As you can see, the name of this employee is now displayed in a slightly different color. This is where you can specify that color.

### Additional Field Settings

[Additional Field Settings](https://www.youtube.com/watch?v=n4hzqgVVGDQ&t=331.0s)

Next, we have a block for additional fields. Here, we can add various extra fields to our structure blocks. For example, a "Products" field has been added here, which contains a specific goal that the department should achieve. Additional fields have a few settings; let's take a look. Let's create a field called "Job Responsibilities" and explore the available settings. There's an option to "Display Under the Block" and another to "Display the Title at the Level of the Content." For now, let's not enable any of them and see how it works. We go straight to the block settings – "Financial Department." Let's add some "Job Responsibilities" here. We won't invent any real ones for now; let's just put in "Responsibility One" and "Responsibility Two." As we can see, a "Job Responsibilities" field has appeared in our block, along with the responsibilities we just entered.What's the difference between this field and the "Product" field, other than the fact that one is a list and the other is plain text? In the "Product" field, the field name appears in the same line as the value. In the "Job Responsibilities" field, the title is above the value. That’s what the "Display the Title at the Level of the Content" checkbox is for. If we look at the "Product" field, this box is checked.Now let's examine the "Display Under the Block" checkbox. We'll look at it using the "Product" field as an example, as the financial department also has a "Product" and it is defined. But we don't see it here. If we scroll down our structure, we will see the department's "Product" listed under all its sub-units. This is what the "Display Under the Block" checkbox is for. If we uncheck this box, we will see that the product now appears directly in the block itself.Accordingly, these various settings allow you to flexibly configure the display of additional fields according to your specific goals and tasks.

### Default Job Title

[Default Job Title](https://www.youtube.com/watch?v=n4hzqgVVGDQ&t=431.0s)

Next, we move on to settings for default job titles at specific vertical levels. What does this mean? For instance, let's open the first setting and see that the "Default Job Title" is "CEO" (Chief Executive Officer). Now, let's say we go into the editing mode for the top block and remove its title. We find that "CEO" will be set as the default title. Even if we completely remove the job title and save, the block will still be labeled as "CEO." The same principle applies to all other levels. Essentially, this is just a base job title for a specific level in the vertical hierarchy of your structure.For example, in the departmental level, we usually have managers. In this specific structure, the accounting department likely has a "Chief Accountant," while all the other departments list "Manager" as the title. To save us the hassle of typing this in every time, we can set "Manager" as the default job title for that particular level.That concludes the basic tutorial on working with structure.

## 1.2 Company Structure: Editing

[Company Structure: Editing](https://www.youtube.com/watch?v=oplGA717U9I)

### Introduction

[Introduction](https://www.youtube.com/watch?v=oplGA717U9I&t=0.0s)

Good day, in this video, we will look at various manipulations when editing the structure. In the scope of this video, we assume that we have already created a project, deleted the demo data, selected a structure template that is most suitable for us, and carried out its basic setup. You can learn more about this in a separate video. Now, let's discuss basic editing and working with the structure itself.

### Assigning an Employee to a Position

[Assigning an Employee to a Position](https://www.youtube.com/watch?v=oplGA717U9I&t=21.0s)

So, as we've already understood, to assign an employee to a position, we need to click on the position to which we want to assign the employee and then select the employee from the list. There can be multiple employees in a single position, as we can see, for example, in the "CEO" block. Obviously, for managerial positions, there is usually only one employee, but for line-level positions, there can be multiple. Take the sales department as an example; at the level of a "Cold Sales Manager," we may have multiple employees, which makes sense. Essentially, yes, they hold the same position, but they are different employees.

### Department Settings

[Department Settings](https://www.youtube.com/watch?v=oplGA717U9I&t=54.0s)

Let's take a closer look at the settings of a specific block. So, what do we have? We can go to the gear icon. Here, we have the name of this block, which is the name of the department. There's also a default position title, or the one that you specify here. In this section, we can also edit additional fields. Furthermore, we have advanced settings; in the first field, you can change the subordinate unit or position that reports to your block. For instance, we are currently looking at the settings of the Financial Department, which is subordinate to the Operations Director. Suppose we want to move the Financial Department under the Administrative Director; in that case, we will need to select the Administrative Director in the "Subordinate To" field. If we do so, our department, along with all its subordinate departments and units, will shift to report to the Administrative Director.Next, we have a "Number" field; this is simply a field where you can specify the sequence number for your department or unit, or in this case, as we have for our departments, a consecutive numbering system is used across all departments.Moving on, we have more advanced settings like block color and background color, which we will discuss in a separate video about fine-tuning the structure. For now, we have covered the main fields. Here, we can also see a button to delete the block from the structure.What else will we be discussing?

### How to Display a Department as a Single Block

[Display the Department as a Single Block](https://www.youtube.com/watch?v=oplGA717U9I&t=140.0s)

Next, we have a toggle button, which, as the tooltip suggests, allows us to display sub-departments as a single block. I think it's easier to show this in action rather than try to explain it. Let's go ahead and click on it. So, what happened? As we can see, there is a certain logic in our entire structure. We have several separate blocks: the CEO, the Operations Director, the Administrative Director, and the department blocks. Sub-departments report to these departments and are displayed somewhat differently. While all the previous hierarchical levels were displayed as separate blocks, which in our case simply means separate rectangles within our structure, the sub-departments now start to appear as one large block that includes all their child units.Moreover, these child units can have their own sub-units. For instance, we see the Sales Department, which is divided into groups. Let's say, in the warm sales section, we see two groups. So, when we toggled this switch for the department, we activated a mode where the department is displayed in the same format as our sub-departments are currently displayed. That means all the sub-departments related to this main department are now housed within a single, large, contiguous block for that department. And any child units of these sub-departments are nested within them, and so on.

### Complicating the Hierarchy

[Complicating the Hierarchy](https://www.youtube.com/watch?v=oplGA717U9I&t=229.0s)

If we put the toggle switch back to its original position, we'll again see the same structure that we initially had and that is typical for the other departments. Why might you need this feature? If we look at a specific department and try to add a new sub-department to it, the new sub-department would report to the department head in the vertical hierarchy. However, it would be at the same level as the other sub-departments in this department. For example, even though the Supply Sector might appear higher up in the list, it doesn't serve as a managerial unit for the new sub-department.You may have a scenario within your Purchasing Department where there's a vertical hierarchy. Let's say the department head has a deputy, and various sub-units for supply, maintenance, and equipment report to the deputy. In our builder, you can easily represent this. So let's go ahead and turn off the toggle switch. Now we see that the units within the Purchasing Department are indeed displayed at the same level. These are separate, independent units representing different operational directions. For instance, let's consider the deputy we spoke about. Let's make our new unit the deputy. We rename it, but now we need to position it between the department head and the reporting units. That's what we'll do.We had talked about the 'Reports To' field. This is where it comes in handy. We move one unit under the deputy, then the second one. And now we have created a slightly different hierarchy. So in our structure, there's a general pattern—there's a department, and it includes independent departments. But within a specific department, we were able to create a different structure.

### Adding Sub-Units

[Adding Sub-Units](https://www.youtube.com/watch?v=oplGA717U9I&t=332.0s)

Although we've already done this, let's specifically talk about how to add new sub-units to the structure. It's actually very simple. Each block has a plus icon that you can click on to add a new sub-unit. The only difference is that, for departments where we've activated our toggle switch, the plus icon will appear at the bottom of the list since we are effectively adding a new sub-unit at the very bottom. Moreover, we can see that each specific direction within a department like accounting also has its own plus icon, allowing us to add further nested units. And, as we can see, we've successfully added a new direction. Let's go ahead and delete that. So, we've covered the basics of working with the structure.

### How to Swap Departments

[How to Swap Departments](https://www.youtube.com/watch?v=oplGA717U9I&t=377.0s)

One thing we haven't discussed in our basic settings is the ability to swap the departments. For example, we've created two departments: accounting and finance, and we'd like to switch their positions. Let's go to the settings of the accounting department. Here we see a "sorting" field with a value of 10. If we go to the finance department, the value in the sorting field is 20. To switch these departments, you have to change the values in these fields. The departments are arranged according to the sorting field in ascending order. So, it starts with 10, then 20, and the next would be 30, 40, and so on. You don't have to remember these exact numbers. If the first department has a value of 10 and you want to place another department in front of it, just change its sorting value to, say, 5. The main point is that it should be less than 10 in this case. And now we see that the department order has changed. The same goes for managing nested units within a department that are displayed as one unified block. If we change the sorting values for these sectors, they will also arrange themselves in top-to-bottom order according to this sorting.

# 2. Metrics

## 2.1 Metrics: Tool Overview

[Metrics: Tool Overview](https://www.youtube.com/watch?v=uxvrr7N-oSs)

### Why Metrics are Needed

[Why Metrics are Needed](https://www.youtube.com/watch?v=uxvrr7N-oSs&t=0.0s)

In this video, we'll get acquainted with one of the most useful and, at the same time, simplest tools in Platrum—metrics. In Platrum, you can set an unlimited number of metrics for each position that you wish to track. Each employee sees their assigned metrics on their desktop, and each manager also sees the metrics of their direct reports, all on the same desktop. The system instantly provides hints about the metrics, identifying various issues and showing the main metrics for each employee. This way, you don't need to go into the details; you can quickly see the current value and trends.

### Desktop

[Desktop](https://www.youtube.com/watch?v=uxvrr7N-oSs&t=36.0s)

So, as an employee assigned a specific metric, I can input or update its value right on the desktop. This is done very easily; I just click on the period I want and either change or enter the value. For each period, you can also set a planned value. In this case, we see that our planned value is 2.5 million, and it changes color depending on the actual achievement. You can set an unlimited number of metrics, depending on how many indicators you want to track for each position. All of them will be displayed here, and you can work with all these metrics right on the desktop. You can also go to the desktop of any of your employees and see their metrics and the metrics of their subordinates if they have any. We'll go over all the nuances of the desktop in a separate video, but for now, let's note that each employee sees the metrics assigned to their position, as well as the metrics of their direct reports on their desktop.

### Working Mode with Metrics

[Working Mode with Metrics](https://www.youtube.com/watch?v=uxvrr7N-oSs&t=98.0s)

As I've already mentioned, metrics are set for each position within the structure you've created in your project. For this, there is a special working mode for metrics in the structure. Now we have entered it and see that specific metrics are assigned to each position. However, it's worth noting that in this mode, we do not see who is assigned to which position. And that's correct, because metrics are assigned not to a specific employee but to a specific position. For example, your hypothetical Sales Director is responsible for gross revenue from clients in our demo project. It doesn't matter who currently holds this position; they are accountable for the gross revenue from clients and will thus be tracking this metric.

### Creating Metrics

[Creating Metrics](https://www.youtube.com/watch?v=uxvrr7N-oSs&t=138.0s)

Creating metrics is very straightforward, involving a simple window where you need to fill in a few parameters. Employees with specific access rights can create metrics. By default, let's remember that the project owner has all the access rights, and they can then decide who can administer what within the project.

### Types of Metrics

[Types of Metrics](https://www.youtube.com/watch?v=uxvrr7N-oSs&t=155.0s)

Our metrics can be either regular or inverse. Inverse metrics are those for which an increase in the value is a negative factor, such as an expense metric. If it's increasing, then it's actually a problem for us. Metrics are also categorized by intervals, and at present, they can be daily, weekly, or monthly. Metrics can also be dual. For instance, it can be convenient to look at both expenses and revenues on one metric to see how they correlate. Additionally, within the company structure, we have a special mode that can be toggled on or off, showing the number of increasing and decreasing primary metrics for each position. For example, we see that in the HR department there are only two metrics, and both are decreasing. Meanwhile, in the Sales Department, we have four increasing metrics and one decreasing. This feature is convenient for quickly assessing the state of affairs in a department and the company as a whole, as these metrics are aggregated up to the company owner level.

### Dashboards

[Dashboards](https://www.youtube.com/watch?v=uxvrr7N-oSs&t=207.0s)

With metrics, you can create dashboards where you arrange these metrics in the order that suits you. You only add the metrics you want to see, thereby creating a control panel. By organizing metrics in a specific order, setting a convenient number of metrics per row, and defining the dimensions of the dashboard and individual widgets, you create a control panel. With just a glance at it, you can quickly identify bottlenecks in your production flow.

### Summary (metrics)

[Metrics: A Brief Summary](https://www.youtube.com/watch?v=uxvrr7N-oSs&t=234.0s)

In summary, in Platrum you can assign an unlimited number of metrics for each position. These metrics have various indicators; they can be direct or inverse and have different periodicities. Each employee in the respective position fills in the metrics available to them. On their desktop, the employee can see the metrics that are accessible to them. Moreover, if the employee has subordinates, they can also see the metrics of their direct reports.

## 2.2 Metrics: Creation and Configuration

[Metrics: Creation and Configuration](https://www.youtube.com/watch?v=ocfJ9dj2GVQ)

### How to Create a Metric

[How to Create a Metric](https://www.youtube.com/watch?v=ocfJ9dj2GVQ&t=0.0s)

In this video, let's take a closer look at the process of creating and administering metrics. To create a metric, we need to navigate to the "Company Structure," open the metric management mode, and simply click on the plus icon next to the appropriate position. An important point here is that you must have access to add metrics. There are two types of such access: the first is the ability to add metrics for any position, and the second is the ability to add metrics for your own subordinates.

### Parameters for a New Metric

[Parameters for a New Metric](https://www.youtube.com/watch?v=ocfJ9dj2GVQ&t=28.0s)

To create a metric, you need to specify its name. Optionally, you can provide a description. This can serve as a clarification, explaining what the metric represents and how it is calculated, so that everyone who views it will understand it in the same way. You can specify whether the metric will be an inverse metric. As a reminder, an inverse metric is one where an increase in value is a negative factor, such as an expense metric. In such a metric, the color highlighting of trends will simply change, and the metric will essentially be inverted. Let's go ahead and create an inverse metric for a more visual example. Next, you choose the interval: it could be daily, weekly, or monthly. What's the purpose? If it's important to track this indicator daily, you obviously choose a daily interval. If it's enough to check it once a week, that means the employee aggregates the data for the past week and inputs it on the reporting day. And, correspondingly, a monthly interval is for indicators that make sense to review monthly.We can also make our metric a dual one. This could be convenient if we want to track two indicators within a single graph. For instance, this is handy for tracking both expenses and revenues and their correlation with each other. If we make this a dual metric, we'll need to select a second metric to combine it with. However, I can only choose from the metrics added to the same position, not from all the metrics added to my structure. We're adding a new metric to a specific position—in this case, it's the HR department. And we can't combine metrics from the HR department with metrics from, let's say, the financial department. It simply wouldn't make sense. Let's go ahead and create a standard metric. Next, we can specify the number of averaging periods. On the desktop, we can view the metrics in an averaged mode. This is necessary to understand the general trend for an indicator that has some interval value. For example, for sales departments, it's quite typical to see a surge in sales volumes in the last week, when everyone is rushing to meet their targets and our revenue increases substantially. But this doesn't necessarily mean we've reached new weekly revenue values that we will now maintain. Usually, the beginning of the next month declines significantly, and in the end, our chart looks like a saw, with sharp rises and falls. Tracking the overall trend becomes quite difficult. To address this, we can average a weekly metric over the last 5 periods, for example. We'll take a more detailed look at how this works on the desktop shortly. Essentially, we've filled out all the parameters needed for creating a metric, and we create it.

### Main Metric

[Main Metric](https://www.youtube.com/watch?v=ocfJ9dj2GVQ&t=184.0s)

In our list, we see that the first metric has the designation "GM" – which stands for the "main metric." What does this mean? Among all the indicators for a particular position, there is usually one key metric that should generally be increasing. The main indicators are leading indicators, the growth of which predicts the growth of the main metric. To change the main metric, all we have to do is change the sorting. The main metric is always the first one on the list. In this case, let's keep the primary focus on the number of employees with increasing metrics.

### Entering Data into the Metric

[Entering Data into the Metric](https://www.youtube.com/watch?v=ocfJ9dj2GVQ&t=217.0s)

So, let's go to the desktop. In this demo account, we're logged in as the CEO, so we don't immediately see the metric we added to the HR department on our desktop. Let's switch to the head of the HR department. Here we see our new metric. This is what a metric looks like for an employee when it doesn't yet have any values. You can see the prompt "Add the first value." So let's add something, say 50. We see that our first data point has appeared. Let's continue filling it in. We remember that this is an inverse metric. Let's try entering a value of 55. We see that the graph turns red, indicating that the value is deteriorating. If we enter a smaller value, the graph turns green, indicating improvement. It's clear that if the metric is inverse, as we used the analogy with expenses, the smaller it is, the better. Let's enter another value. Starting with four values, a trend appears. The trend is calculated based on the last four values. So we've covered inverse metrics. These coexist with regular metrics, where an increase in value is a positive factor. For an inverse metric, the value axis points downward, and an increase is a negative factor.Next, we discussed dual metrics. We can look at an example of a dual metric. This simply involves two graphs, accompanied by a legend, which you can see superimposed on each other to track some correlation between them.

### Average Values

[Average Values](https://www.youtube.com/watch?v=ocfJ9dj2GVQ&t=310.0s)

We also talked about average values. Let's see how this works. So, let's switch to the average values mode. For example, we see that the profit chart for the CEO has become smoother. Overall, it generally follows the same dynamic. However, for instance, a significant drop on December 9th is somewhat smoothed out. In this case, this metric has an averaging set up for 5 periods. This is precisely the last field in the metric creation window that we saw. How are the values calculated here? To get the values for January 13th, we sum up the values for January 13th, January 6th, December 30th, December 10th, December 13th, and December 16th, and divide by 5. So, we get the average values for the last 5 periods. The same goes for January 6th. But now we look at 5 periods starting from January 6th. The same for December 30th, and so on. So, if we have sharp increases or declines in our weekly statistics within a month or within a 4-week cycle, averaging will smooth them out.

### Setting the Start Day of the Week

[Setting the Start Day of the Week](https://www.youtube.com/watch?v=ocfJ9dj2GVQ&t=368.0s)

Now let's consider some more metric settings that pertain not just to a specific metric but to the entire project as a whole. The first setting is the start day of the week, which is used for weekly metrics. If we have a weekly metric, it's obvious that we have a specific reporting day when we enter this metric's value and effectively close the week. While a classic calendar week generally goes from Monday to Friday, many companies operate on their own custom weeks. For example, your week might go from Thursday to Wednesday. So, your week starts on Thursday and ends on Wednesday. In that case, if our week-start day is Thursday, we would enter the value each time for Wednesday. That is, our reporting week ends on Wednesday, and we input its value then.Let's go back to our dashboard. Here we have a weekly metric, and we see that the dates correspond to Wednesdays in calendar weeks. Accordingly, if I change this value, the reporting date will also change. Naturally, different work schedules can be set for various positions, and you can specify, for instance, that some roles have no days off or work in shifts. All of this will be accounted for in the metrics. We'll look at this in more detail in another video.Now let's continue exploring this setting. Here's an essential point: you need to decide on the week-start setting right at the start of your work. This is crucial because if you change the start day of the week after you've already entered some values into the metric, those values will disappear from the charts. They will not be deleted; if you change the week-start day back, the previous values will return. But why does this happen? Let's say our week was from Thursday to Wednesday, and we were entering values for each Wednesday. Now we want to start the week from Monday. We can't simply shift the values from Wednesday to what would now be Friday if the week starts on Monday and ends on Friday. We can't just move historical data from each Wednesday to each Friday, as there's a two-day difference between them, and this gap could significantly affect the values. Therefore, it's crucial to decide on the start day of the week when you first start working.

### Period Setting

[Period Setting](https://www.youtube.com/watch?v=ocfJ9dj2GVQ&t=495.0s)

Next, we have the setting for the number of periods in metrics. This setting controls the default number of periods displayed on the chart. For example, when we create a new metric, in this case, we'll see 8 dates displayed. If we want to always see, say, 12 dates on the graph, we can simply change this value to 12 here. Let's save and go back to the dashboard.

What It Looks Like on the desktop

[What It Looks Like on the desktop](https://www.youtube.com/watch?v=ocfJ9dj2GVQ&t=518.0s)

We see that now 12 values are being displayed. Generally, it doesn't make sense to display a very large number of values because what matters at the moment is the specific current growth dynamics. If we want to analyze the long-term performance of our metric, we can look at its full history. Every metric on the dashboard offers the option to view all historical data. So, here we can see the metric's performance over time.

### Deleting Metrics

[Deleting Metrics](https://www.youtube.com/watch?v=ocfJ9dj2GVQ&t=544.0s)

To delete a metric, it's pretty straightforward. All we have to do is open it in edit mode from the structure and click the delete button. So, in this video, we've covered metric creation, administration, and various settings.

## 2.3 Metrics: The Dashboard

[Metrics: The Dashboard](https://www.youtube.com/watch?v=oSh9C1\_Lj-I)

### The Purpose of the Dashboard

[The Purpose of the Dashboard](https://www.youtube.com/watch?v=oSh9C1\_Lj-I&t=0.0s)

In this video, we'll look in more detail at working with a user's dashboard in Platrum. The dashboard is the main page for any Platrum user. Here you can see all the metrics assigned to you, summary information about your subordinates, as well as a summary related to all the sections and tools that concern you. For instance, if there is an expense claim in the financial plan waiting for your approval, you will see a corresponding message here. Or if you have tasks that are due today, you will again see the number of such tasks and brief information about them here. This is designed for convenience, so you don't have to go into each section to check the current status on various data that require your attention.

### Information About Direct Subordinates on the Dashboard

[Information About Direct Subordinates](https://www.youtube.com/watch?v=oSh9C1\_Lj-I&t=40.0s)

Also on the dashboard, we see information about our direct subordinates. It's important to note that what's displayed here are your direct subordinates, not all subordinates within the structure. For example, if you are the head of a department, you will see the heads of divisions as your direct subordinates. You will not see line-level employees. The reason for this is quite simple. If you're a department head, you most likely don't need to constantly monitor line-level employees' metrics. That's the task for your direct subordinates, i.e., the heads of divisions or departments, and so on. Now, let's take a closer look at this interface.

### Information About a Specific Employee

[Information About a Specific Employee](https://www.youtube.com/watch?v=oSh9C1\_Lj-I&t=79.0s)

First of all, we see a field where we can select the employee we want to view. By default, when you go to the dashboard page, you will always see your own dashboard. But here, you can also select any employee you have access to. Accordingly, if I don't have any subordinates or don't have separate permissions to view metrics across the company, I will only see myself here.

### Date Filter

[Date Filter](https://www.youtube.com/watch?v=oSh9C1\_Lj-I&t=103.0s)

Next, we have a date filter. This is simply to view metrics for a specific time period. For example, let's look at the quarter. We see that it's currently January, so the quarter has essentially just begun, and we see that there are three remaining data points. We can select any range from past dates, for instance, December 1st to 15th, and two relevant data points will appear.

### Metric Data Averaging

[Metric Data Averaging](https://www.youtube.com/watch?v=oSh9C1\_Lj-I&t=131.0s)

Then we have the option to display each metric in an averaging mode. In this case, instead of each specific value, an average over the last several periods is displayed. The number of these periods is something you set in the metric settings. For more details about this mechanism, refer to the video on metric settings and management.

### Chart Size

[Chart Size](https://www.youtube.com/watch?v=oSh9C1\_Lj-I&t=153.0s)

Finally, there's an option to change the size of each chart. This simply affects the area that your chart will occupy.

### Archived Metrics

[Archived Metrics](https://www.youtube.com/watch?v=oSh9C1\_Lj-I&t=162.0s)

We also have a toggle here for showing archived metrics. In this case, the current user doesn't have any archived metrics. This toggle allows you to view all metrics that the employee has tracked in the past. These metrics are no longer relevant, so they are hidden by default. However, you always have the option to view historical data and look at archived metrics. For more details on archived metrics, and how to transfer metric values when an employee changes positions or when a new employee replaces a previous one, consult a separate short video.

### Metrics Report

[Metrics Report](https://www.youtube.com/watch?v=oSh9C1\_Lj-I&t=203.0s)

Additionally, there's an option to go to a simple metrics report where you can see summarized information for all the metrics available to you. You can view both relative and absolute values for all metrics, find metrics for specific positions, specific employees, and so on.

### Metrics Settings

[Metrics Settings](https://www.youtube.com/watch?v=oSh9C1\_Lj-I&t=220.0s)

Right here, we also have a link to the metrics settings. This button is only available to those who have administrative access to metrics and allows quick access to the relevant settings.

### Employee Metrics Issues

[Employee Metrics Issues](https://www.youtube.com/watch?v=oSh9C1\_Lj-I&t=231.0s)

What do we see for direct subordinates? In addition to their name and avatar, which quickly helps us visually identify who we're looking at, we see the presence of issues. If we hover over these issues, we get a breakdown. For instance, in this case, our employee Nikita Volkov has a declining metric over three periods and a metric without a quota. Let's expand this and look. Yes, we see that this employee's metric has been declining for three periods, and it's his primary and only metric. The system indicates that there's an issue here. This problem is severe enough that we even see it in the summary information, as the manager of this employee. Another issue here is a metric without a quota. We see that there are no quotas set for the next period. What does that mean? It means that the employee doesn't know what result they're supposed to deliver; we have no specific expectations from them right now. This makes it either difficult to evaluate how well they've done, or they might be surprised that what they thought was a good result is not what you expected. So, let's correct this issue by setting an expected value. We see that the problem is instantly resolved.

Other potential issues could be that a position has no metrics at all. For example, for employee Anastasia Krugletsova, we see that no available metrics are found. Also, there's an issue with a metric having a period with an unfilled value. Let's take a look at how this appears. We see that as of the video recording date, it's January 27, which is the last reporting day of the week. The employee should have already entered a new value, but the previous one is still not filled in. It could be that the employee is no longer tracking this metric or that there's some other problem.

### Employee Metrics Thumbnail

[Employee Metrics Thumbnail](https://www.youtube.com/watch?v=oSh9C1\_Lj-I&t=340.0s)

Also, for each employee, we see a small-sized display of their primary metric. Essentially, a single glance is enough, without even expanding each individual employee, to get a general sense of how things are going. When hovering over it, we'll see the current value for the last completed period and its dynamics compared to the previous completed period.

### Employee's Dashboard

[Employee's Dashboard](https://www.youtube.com/watch?v=oSh9C1\_Lj-I&t=360.0s)

If we select another employee from here, or go to an employee's dashboard from the list of our direct subordinates, we'll see the exact same interface but tailored for that specific employee. For instance, for this employee, we see both their metrics and their direct subordinates, as well as any issues those subordinates may have. In this way, you can go to the dashboard of any of your subordinates who are also managers, and get a comprehensive view of how things are faring with the employees in their department, whether they are adequately addressing issues with their subordinates, and so on.

Metrics for Adjacent Positions Metrics for Adjacent Positions And the last important point we need to discuss is the metrics displayed for direct subordinates. And now, to further clarify, let's delve into the organizational structure and pay attention to the finance department. If we access the workspace of Ivan Petrov, we will obviously see that he has two direct subordinates: the chief accountant and the head of the finance department. These are Julia and Diana. However, we can see that Julia also holds the positions of head of the procurement department and head of the production department. Obviously, she has metrics for these positions as well. So when we look at Julia on the workspace of our financial director, Ivan Petrov, we will only see the metric related to accounting. This is because Ivan Petrov only influences this metric as the leader and financial director. He has no connection to Julia's metrics related to other departments. Therefore, for your direct subordinates, if you have employees who hold multiple positions, you will only see the metrics that are relevant to the positions that are directly under your supervision. However, if there is some adjacent position, although it may not be a very good example of the organization's structure, perhaps you made a mistake when planning your company's structure somewhere. Nevertheless, if such a situation arises, you will only see the metrics for direct subordinates that you genuinely influence as their immediate supervisor.

## 2.4 Metrics: Dashboard

[Metrics: Dashboard](https://www.youtube.com/watch?v=8hiiG4AAcFo)

### Why Dashboards are Needed

[Why Dashboards are Needed](https://www.youtube.com/watch?v=8hiiG4AAcFo&t=0.0s)

Good day! In this video, we will explore working with dashboards in Platrum. Dashboards in Platrum are primarily designed to allow you to place all the available metrics in a convenient order, set the display sizes for these metrics, and attempt to find correlations on a single screen. For instance, you can arrange all metrics in the sequence of your production process and identify bottlenecks. It can also include metrics for your subordinates. It's very convenient to have them all on one screen to draw conclusions. Additionally, you can add external information to this screen, which we will discuss shortly. First, let's see how we can add some metrics here.

### How to Add Metrics to the Dashboard

[Add Metrics to the Dashboard](https://www.youtube.com/watch?v=8hiiG4AAcFo&t=37.0s)

So, I already have a configured project with some demonstration data. I have metrics set up with some values already input. Now, let's try to set up the dashboard itself. Here, you can see that I've already added four metrics to this dashboard. Let's try to add another metric, for example. We click on the "Add Widget" button. Next, we need to select a metric. Let's choose the first one that comes up; it might not be filled in at the moment. Yes, as we can see, it's empty. In this case, I've already added all the metrics I need here, and we added this one just for demonstration purposes. In principle, you can input values into the metric directly from the dashboard, not just from the workspace. So, if I click on a period right now, I can enter a value. Let's go ahead and delete the widget we just added because we don't need it on this dashboard.

### How to Move Widgets

[Move Widgets](https://www.youtube.com/watch?v=8hiiG4AAcFo&t=90.0s)

Let's see what we can do with the widgets we've already added. Firstly, we can drag and arrange them in the order we need, as I mentioned earlier, either following the production process or in any other order. Let's take a closer look at the available settings.

### Hide Scale

[Hide Scale](https://www.youtube.com/watch?v=8hiiG4AAcFo&t=103.0s)

So, for each widget, we have the "Hide Scale" setting. As you can probably guess, it hides the scale. I've enabled it for the "Company Debts" widget, and now we can't see the values for each period. When might this be useful? For example, when you display some general metrics on a screen or monitor in your office, and many employees can see these metrics, and it's important for you to simply show the overall situation. Let's say your metric is the company's total revenue, and it's increasing. However, naturally, you don't want to disclose the details of your company's financial performance to all employees.

### Widget Size

[Widget Size](https://www.youtube.com/watch?v=8hiiG4AAcFo&t=141.0s)

Next, we have the "Width and Height" settings. These settings affect the size of the widget on which this metric is placed. For example, let's try changing the width of the metric right now. I set the width value to 6, and we can see that our metric has stretched, occupying more space than before. To be more precise, it has taken up twice as much space because the initial width was set to 3. What are these units of measurement, and how do they work? Let's delve into this in more detail. Of course, you can also adjust the height.In the dashboard settings, we have a very important setting – the number of columns. Your dashboard is divided into a specific number of columns. These columns are invisible to us, but the system takes them into account when building the dashboard. For example, in this dashboard, I have configured a total of 12 columns, and each widget has a width of 3 arbitrary units, which is equivalent to 3 columns. Thus, I can fit 4 widgets per row, each spanning 3 columns. Let's see what happens if I reduce the number of columns. I changed the number of columns to 11, and now 4 widgets spanning 3 columns each do not fit on one row. Let's try increasing it. Since we only have 4 widgets, further increasing the number of columns doesn't make much sense. However, it's clear that by increasing the number of columns to 15, we can now fit another widget in the same row. Let's return the value to 12. We will discuss the general dashboard settings in more detail shortly. For now, let's finish with the settings for specific widgets. So, width and height – we've covered that.

### Dual Metric

[Dual Metric](https://www.youtube.com/watch?v=8hiiG4AAcFo&t=226.0s)

A dual metric allows us to combine multiple metrics on a single chart. Moreover, in dashboards, you can even combine metrics that are not originally created as dual metrics. For example, let's try combining the "Company Debts" metric with the "Expenses" metric here. To apply these changes, we either need to wait for the next dashboard update or refresh the page manually. After the update, we can see that this widget now displays two charts.

### Display Average of the Chart

[Display Average of the Chart](https://www.youtube.com/watch?v=8hiiG4AAcFo&t=258.0s)

Next, we have the "Display Average" setting. We explained in more detail how this setting works in the video about metric settings, but in brief, you can display each metric in an average mode over the last several periods. For example, if we enable this mode for the "Gross Revenue from Customers" metric, we can see that the chart has become smoother. If we disable this metric, we can see fluctuations in the chart. How does this averaging work? When we enable this mode, each point shows the average value for the last several periods. You specify the number of periods in the settings. In this case, I have set it to 5 periods. This kind of averaging allows you to smooth out any random value spikes when there is a sudden increase or decrease for some reason, but it's not a systemic issue and doesn't affect the overall trend. To assess the overall trend, you can view the metric in average mode. And of course, you can delete each metric from our dashboard.

### Dashboard Settings

[Dashboard Settings](https://www.youtube.com/watch?v=8hiiG4AAcFo&t=317.0s)

Now, let's move on to the settings of the dashboard itself. As we've already seen, there's a setting for the number of columns, and here we have a demonstration mode. This mode allows you to hide all other dashboards available to you from those who will see this displayed dashboard. It also provides more space for the charts themselves. Next, we have dashboard settings. There are only two settings here: the dashboard name and the refresh rate. Naturally, when you display it on a screen somewhere, it will refresh itself, so you won't need to manually refresh it constantly. You can set the refresh frequency in seconds here. And then we have access settings. By default, the dashboard is only accessible to you, the owner of the dashboard. Each dashboard has the owner's name, and it's not accidental.

### How to Share the Dashboard

[How to Share the Dashboard](https://www.youtube.com/watch?v=8hiiG4AAcFo&t=361.0s)

If you want to share this dashboard with someone so that another employee can see it in their Platrum dashboard section, you can use the access settings. Firstly, of course, you can simply grant access to this dashboard to all users. You can also grant access to specific positions. Here, we have a dashboard for financial metrics, for example. Let's grant access to the CEO. Now, an employee in the CEO position will always see this dashboard in their dashboard section, but they won't be able to edit it. Currently, only the owner of the dashboard can edit it; everyone with access can simply view the dashboard.

### How to Embed External Data

[Embed External Data](https://www.youtube.com/watch?v=8hiiG4AAcFo&t=398.0s)

Now, let's explore the option of placing external data in the dashboard. You can do this by embedding these data via iFrame. To do so, click on the "Add Widget" button, and in the widget adding window, select the special option "Add iFrame." You'll notice a unique widget has been added. Here, you can see a hint that you need to add the iFrame link in the widget settings on the right. Go to the widget settings, and you'll find a field to enter the link. Let's try embedding some data from a Google Sheet here. For example, suppose you maintain an external report in Google Sheets. I have a cohort report open in Google Sheets, and I want to add it to my Platrum dashboard so that I can see all the metrics I'm interested in and other indicators that I calculate separately on one screen.Here's what you need to do in the case of Google Sheets:

1. Go to the "File" section.

2. You'll find an option called "Publish to the web." Click on it.

3. Select "Embed" here.

4. Choose whether you want to embed the entire document, the entire table, or a specific sheet. In this case, let's go with a specific sheet from this report.

5. Click "Publish." Confirm if necessary.

6. A link will appear, which is what you need. Copy this link and paste it into the corresponding field in your widget settings.

7. Let's name this report "Google Sheets Report."Now, you can see that data from the Google Sheet is being imported into our dashboard. You might notice that not all the data is visible here. You can scroll through it, but that might not be very convenient. Let's adjust the dimensions to see more data. We've added data from our report, and now we can see metrics that are tracked in Platrum and data collected from another system on the same screen. Of course, you can embed data from various systems that support this feature using iFrame in a similar way.

### Metrics: Transferring Metric Values to Another Employee

[Metrics: Transferring Metric Values to Another Employee](https://www.youtube.com/watch?v=HAcKEKceXmQ)

### Why Transfer Metric Values

[Why Transfer Metric Values](https://www.youtube.com/watch?v=HAcKEKceXmQ&t=0.0s)

In this short video, let's discuss a situation that often arises when an employee changes their position within the company or leaves the company, and you replace them with a new employee. You may need to transfer the value of a metric that the previous employee had been tracking. What could be challenging here? As you know, metrics are assigned to specific positions within the company, not even to individual employees but to positions. If an employee occupies a certain position, metrics are assigned to that position. Now, when an employee leaves that position, and a new one comes in, it doesn't automatically mean that the new employee inherits the previous employee's metric values.There are a few reasons for this. First, within a single position in your organization, you might have multiple employees. This is especially common for managerial positions. For example, you have a sales manager, and it's not possible to divide one employee's metric value among the others in the same position. Second, there could be situations and reasons why you don't want to show the previous employee's results to the new employee.So, when dealing with transferring metric values, it's important to consider these complexities and the specific context of your organization.

### Hypothetical Employee Termination

[Hypothetical Employee Termination](https://www.youtube.com/watch?v=HAcKEKceXmQ&t=60.0s)

Now, let's consider an example of such a situation. For instance, we have an employee, Nikita Volkov, and the system is showing us that his metrics have been decreasing for three periods. Let's hypothetically assume that we've decided to part ways with this employee, and we've found a new Director of Production whom we need to appoint. We also need to transfer the metric value that our previous Director of Production had been tracking. Let's do it.There are several ways to accomplish this. To remove an employee from a position, you simply need to detach them from that position. However, if you understand that the employee will no longer be working in the company at all, you can also remove them from the list of employees altogether. But for our example, let's just detach the employee from the position. So, we go to the relevant position, enter the editing mode, and detach the employee. That's it; we have removed the employee from the position.

### How to Replace an Employee in a Position

[How to Replace an Employee in a Position](https://www.youtube.com/watch?v=HAcKEKceXmQ&t=83.0s)

Now, let's appoint a new employee to this position. We have added a new employee.

### Archived Metrics

[Archived Metrics](https://www.youtube.com/watch?v=HAcKEKceXmQ&t=117.0s)

Let's take a look at the dashboard of the previous employee, Nikita Volkov. We can see that Nikita Volkov no longer has access to any metrics because he held a position to which a certain metric was linked. However, he had entered a metric value before leaving, and we haven't lost that value. No, we haven't lost his value. We can enable a special switch that shows archived values. By default, it's turned off because if an employee no longer holds a particular position, these metrics are likely not relevant to them anymore, and they shouldn't be constantly displayed on their dashboard, distracting their attention. Here, in the archived metrics, we can see the metric that this employee had once entered. Naturally, it cannot be changed; these are historical data.

### How to Transfer an Archived Metric

[How to Transfer an Archived Metric](https://www.youtube.com/watch?v=HAcKEKceXmQ&t=165.0s)

But what can you do? There's an option to transfer this metric. However, you can only transfer archived metrics. In other words, you cannot transfer a metric from an employee who currently holds the position and is actively managing that metric. But if you have removed an employee from a position and have already appointed a new employee to that position, you can transfer the metric to the new employee. As we recall, we have already appointed a successor; let's try to transfer the metric. We see the field for choosing a successor because currently, there is only one new employee in this position, and the system has automatically filled in the field. If there were multiple employees, you would need to select whom to transfer it to. Until we transfer these values, Eugene Lensky's metric, "Cost of Produced Products," will remain empty because he has just taken on this position, and what happened before is not directly related to him now. If you don't transfer these values to him, he will start filling in this metric from scratch. Let's transfer it.

### What the New Employee Sees

[What the New Employee Sees](https://www.youtube.com/watch?v=HAcKEKceXmQ&t=201.0s)

We have transferred the metric; let's open Eugene Lensky's dashboard. We can see that the metric, which he was not previously managing, but has just been assigned to him, is already filled with historical values inherited from the previous employee.

# Tasks

## Tasks: Implementation of Weekly Planning

[Tasks: Implementation of Weekly Planning](https://www.youtube.com/watch?v=7RXYl8Ja5Hs)

### Why Plans Are Necessary

[Why Plans Are Necessary](https://www.youtube.com/watch?v=7RXYl8Ja5Hs&t=0.0s)

Hello everyone! Today, we'll be discussing an incredibly useful tool: plans. These plans will help you manage your week more effectively, as well as assist your employees in being more productive. They'll gain a better understanding of what they're doing, what's working, and what isn't. This will allow them to make necessary adjustments in their work and help them achieve better results. It's a straightforward tool, and I'll explain it further.The simplicity lies in the fact that at the beginning of the week, an employee creates a list of tasks for the week. At the end of the week, they review their work, check off completed tasks, and provide results, noting what they achieved or why they didn't succeed. That's the basic principle. It's incredibly simple—a list of tasks and their outcomes. It's much easier than using a calendar because sometimes people find it simpler to list what they plan to do and then distribute that work throughout the day at their convenience, rather than trying to schedule everything in a calendar and constantly reschedule tasks. Planning is more convenient than using a calendar. Let's explore the details of what we see here and the available features.

### When You Have Multiple Positions

[When You Have Multiple Positions](https://www.youtube.com/watch?v=7RXYl8Ja5Hs&t=71.0s))

The first thing to note is that if you have multiple positions, I highly recommend creating plans for each of these positions. If, within a particular position, you spend less than, let's say, 20-30 percent of your working time, it's a good idea to set up plans for each position. You can configure the displayed positions here. I'm demonstrating, for example, that I'm acting as the CEO and also taking on the role of the CFO. So, I'm creating plans for both positions. If you're only working in one position, you can leave the other one untouched.

### Task Grouping

[Task Grouping](https://www.youtube.com/watch?v=7RXYl8Ja5Hs&t=104.0s)

What else do we see here? We also have different types of task grouping. There's a simple task group, which is the most basic one. You can use this to list your main tasks. For projects, well, it depends on your preference; you can use this category as well. I use it to coordinate with some managers, where we keep long-term tasks separate. Regular actions - here you can record various coordination efforts, different outcomes, basically anything that happens regularly. Plus, tasks with deadlines and repetitions will automatically be grouped here if you set those parameters. There's also a group for learning. For example, if you're interested in constantly improving yourself or your employees, you can focus on dedicating 1-3 hours per week to learning tasks. But again, decide for yourself how you want to coordinate this.

### Fields in Plan Tasks

[Fields in Plan Tasks](https://www.youtube.com/watch?v=7RXYl8Ja5Hs&t=167.0s)

Moving on. There are several columns here. Specifically, tasks, products, and board columns. We'll go over them in more detail shortly. But the minimum set you need is a task and result. As I mentioned earlier, at the beginning of the week, a person writes their tasks, and at the end of the week, they write the results. Pay very close attention to the fact that if a task is not completed, they should write why it wasn't completed. If it is completed, it's better to provide some confirmation of its completion. For example, attach a link to the document that was completed or add a comment confirming that everything is okay, and the task is completed to the best of their ability. Again, it depends on the situation and different tasks. Use your judgment on what to include. Ideally, your manager should read your plan and shouldn't have any questions about your tasks because everything should be clear to them here. What else do we have here? For example, when your employee completes their task list for the week, you can review it during coordination and make some adjustments. Once you've sorted out the priorities and approved everything, you click "Plan Approved." This way, the employee won't be able to delete these tasks, and you'll know that everything they planned is still there.

### Employee Doing Tasks Not in the Plan

[Employee Doing Tasks Not in the Plan](https://www.youtube.com/watch?v=7RXYl8Ja5Hs&t=240.0s)

However, employees can still add tasks here; they will simply be highlighted separately. This is useful for situations where an employee does everything except what they planned and comes up with various tasks for themselves. In such cases, the manager needs to see that the employee is not handling planning well, constantly getting distracted, and constantly taking on additional tasks. This situation needs to be discussed, and perhaps some rules should be put in place, such as not taking on new tasks without approval, or making it clear that everything that should be in the plan must be completed. If an employee consistently fails to complete their plan, I highly recommend implementing a "Plan vs. Actual" system. In this system, a plan includes the number of hours an employee expects to spend on a task. When the task is completed, they indicate how many hours it actually took. I don't recommend using a timer or strict monitoring here; it should be more about common sense and attention to the process. For example, if we plan to spend about three hours on a task, and it actually takes 2 hours and 40 minutes or 3 hours and 20 minutes, it doesn't matter much because tasks tend to fluctuate slightly, and these details aren't crucial. If you find that these details matter a lot and there is always a small overrun, you can specify it, for example, as 3.5 or 3.2, indicating that you tend to take a bit more time than planned. In my practice, it's often about completing one task a little faster by 20 minutes and another one taking a bit longer by 20 minutes, so it evens out. What's really important here is to assess whether your plan's overall workload is reasonable. What does "reasonable" mean? If you plan to work 80 hours in a week, don't be surprised if that plan is not realized. If you plan to work 20 hours, understand that your manager will likely be unhappy with it, so as a manager, you shouldn't approve such plans where only 20 hours are planned. I'm okay with plans that fall within the 35-45 hour range because I understand that there's some variability, and some tasks may take longer while others are quicker. However, depending on the situation, you can control and define this better.

### Field Result, Planned/Actual Time

[Field Result, Planned/Actual Time](https://www.youtube.com/watch?v=7RXYl8Ja5Hs&t=402.0s)

Let's take a look at the previous week. Here's what the plan was, and when you start coordination, you begin by reviewing the employee's previous plan. Here, I've added some demo data. What do we see here? For example, a task was planned, and it was estimated to take 5 hours. In the end, in the comment section, it says that the first and third departments, for example, out of our 8 departments, worked on it, and it took 2 hours. So, as a manager, I would understand that the person might not be keeping up and only completed part of what was planned. But I would also expect that maybe some other deliveries took longer, and that's why they didn't finish these 3 hours here. So, some other tasks must have taken more time. And then, of course, I would continue to check. Spoiler alert: there's always a summary at the bottom. So, the plan was for 27 hours, and they did 21 hours. Obviously, in this case, they were probably not very efficient, which is why they didn't complete this task. For example, changing the domain owner. And, for example, some composed link, some confirmation that the domain has been changed, like a certificate for the domain change. We see the task here, and it's opened up very widely. All the results you write here will be compiled in the comments section, so you can see everything there. For example, if a task is rescheduled multiple times, all the comments will be grouped here, and you can go back and review them. Setting up email forwarding. Done. In general, if your manager is satisfied with an answer like "everything is done," that's okay. Ideally, you could attach a screenshot here to show that everything has been completed, so your manager doesn't have to ask you for details about what exactly is done. Signaling for induction. Comment: Didn't have time. Ideally, you should write why you didn't have time, what you were busy with. If it's not evident from the tasks, you should explain what went wrong here. When I coordinate with just one person, don't pay attention to the fact that it's my plan; this is just an example we're going through. Suppose it has already been approved. I mark it as "Plan Reviewed." This is just for me to have data showing that I've been here, so I don't need to review it again. Because sometimes coordination shifts around, and you might not remember whether you've reviewed the plan or not. It's a very convenient feature.

### Unapproved Tasks

[Unapproved Tasks](https://www.youtube.com/watch?v=7RXYl8Ja5Hs&t=543.0s)

Similarly, for the second position, we also check what happened, meaning which tasks were completed and which were not. You can see this one in light red; it's less intense. Here's another example. This pale task, in red, was added after the plan was approved. So it's color-coded, showing that they added it after the plan was approved by the manager and, in the end, didn't complete it. But again, real-life situations can vary slightly. What's really cool here is the use of these dots. If a task was in the previous plan but was not completed, it will be displayed here during planning, and it will have these dots to indicate that it was already in the plan, so ideally, it should be included in the new plan. But again, depending on the real workload and circumstances, you might either include it in this plan or realize that something has changed slightly and decide to include it later. In any case, all your tasks that were ever in a plan and remain incomplete will be displayed in your task queue, and these dots will indicate how many times that task has been in the plan.

### Task for Multiple Weeks

[Task for Multiple Weeks](https://www.youtube.com/watch?v=7RXYl8Ja5Hs&t=611.0s)

Look, let's take the task "Prepare reports for the fund" as an example. Here it was planned for this week, and now, let's say, it's not done again this week. So when we come here, it has two dots, indicating that it was in two plans and still not completed. And it was actually a task from the previous week that was not completed in conjunction with the commercial aspect. If I want to add this task to this week's plan, I just click this button, and that's it; the task is added here. If I want to remove a task from the plan, I click the button again. If the plan is approved, you can't remove tasks from it; you can only add new ones, and they will be displayed in a different color.So, what does this tool help with? First of all, it allows you to see which tasks are taking a long time, and in such cases, you probably need to talk to your employees about breaking down the process and setting smaller tasks, or you might need to assess why tasks that you agreed upon are not being done, especially if they were high-priority. This is much more convenient than working with Kanban boards because with Kanban boards, if you have a sprint, and you didn't complete some tasks, when you later convert that task into a new sprint, you lose the history that this task was on the previous sprint or was on several sprints before. For example, when I look at some department's boards, I sometimes see that there are 5 tasks from sprint 3 weeks ago because, in reality, tasks from that sprint have already been pulled into future sprints, and there's no historical data. The reason why they weren't completed is unclear. So I highly recommend using this approach for planning and working with weekly sprints. It's very convenient and quick.

### How to Add Tasks from Boards to the Plan

[How to Add Tasks from Boards to the Plan](https://www.youtube.com/watch?v=7RXYl8Ja5Hs&t=722.0s)

If for some reason you still need to work with boards and you see an overall picture there, what does this tool allow you to do? In the settings, you can display a panel with any board that you have in your favorites. Here, there's specifically a restriction to only show favorite boards because if it showed all boards, for example, I would have hundreds, and I wouldn't be able to manage them. But here, in this project, I have a strategic task board, and it fits on my screen here, and let's say there are our panels there, and I can add any task to my plan the same way. Hop, hop, they are added to my plan. Very convenient. You see, they are light blue because they were added after my manager, well, here I am my own manager, approved it, so they are displayed in a different color. What other benefits are there? First of all, you can see your subordinates' tasks, those that are in their plans, and, for example, a manager can add tasks from the plans of other employees. Why is this convenient? For example, an employee has a task to create some regulations. Obviously, the manager will still need to review it, make corrections with the employee on how to write this regulation. Instead of duplicating it endlessly, the manager also adds this task to their plan, and everyone is comfortable. There's no need to repeat the same task ten times or rewrite it; it's very convenient to work this way. The same goes for task audits, that is, if you want to see some tasks additionally in this interface, you can add some tasks as an auditor or ask to be assigned as an auditor, and then you can add all these tasks to your plan. There are situations where a manager's plan consists primarily of tasks from their subordinates, and they simply help, control, and ensure that everything works. It would be strange if all the tasks were like this, but when it's about half, it's normal again; it depends on the situation.

### How the "Product" Field Saves Lives

[How the "Product" Field Saves Lives](<https://www.youtube.com/watch?v=7RXYl8Ja5Hs&t=844.0s>)

What's also crucial is that if an employee, for example, is swimming, the plan vs. actual doesn't help them, and they produce a result that isn't what you expected. Of course, the formulation can be improved, but you can also enable a feature called "Product" so that when the employee writes the task title, they describe what product should be the result of completing the task. This product can be a completed and correctly formatted report in a specific form or a regulation written and posted in the knowledge base. In general, this field helps your employee and you to synchronize very clearly about what you expect as a result of completing this task. If you had problems before, where you didn't understand each other, implement this field, and most likely, your problems will disappear. This works incredibly well.

### Task Prioritization

[Task Prioritization](https://www.youtube.com/watch?v=7RXYl8Ja5Hs&t=896.0s)

The tool also helps manage task priority. When coordinating with my employees, I ask them to place more important tasks at the top, and they should be placed at the top. You can increase the priority by simply dragging it, and you can also add urgency to the task. Thus, urgent tasks and tasks from previous plans will always be at the top. Implement this field. So when I communicate with my employees, I expect that everything at the top will be completed for sure, and it's better to leave something undone at the bottom rather than at the top. We discuss this right away. I recommend that you also take this into account. Adventures between employees and their subordinates can be managed through this selector. If you have subordinates, you will have quick access, and you can quickly switch to view their plans. The plans themselves are shifted using these buttons. The week, or more precisely, the sprint formation occurs from the day of the weekly report. In this project, it's set to Thursday. Therefore, Thursday is Wednesday here. The weekly report is formed. If I press the buttons left and right, I will move the sprint. This is also very, very convenient. In general, I've probably covered everything here. This tool helps conduct planning extremely effectively and quickly summarize. Again, if you and your employee have agreed on the correct filling out, sometimes very little time is required for coordination. And sometimes there's no need for coordination at all. For example, when I, as a manager, have read all the results, everything is clear to me. I've checked the plan, ticked it off, looked at their next sprint, everything is clear to me. I don't want to change anything; let it continue working. Why waste time on some communication, especially when I have no questions. That's it. Even if you're just starting to implement this, it will be a super support for your work. Good luck, and I wish you effective planning and achieving your results.

## 3.1 Tasks: Overview

[Tasks: Overview](https://www.youtube.com/watch?v=bQrrE21XQ4U)

### General Layout

[General Layout](https://www.youtube.com/watch?v=bQrrE21XQ4U&t=0.0s)

Good day! In this video, let's take an overview of working with tasks in Platrum. The first page we land on when we go to the tasks section is the main page. On the main page, we see a daily planner where we can schedule tasks for specific times and work with it like a regular task calendar. Here, we also see a task queue and various task panels that make your work and task administration easier. You can view the tasks you've assigned to your subordinates, as well as tasks you've assigned but your subordinates haven't planned or set deadlines for. You can also check your future plans here and more.

### Moving Tasks

[Moving Tasks](https://www.youtube.com/watch?v=bQrrE21XQ4U&t=35.0s)

On this page, you basically see all the tasks that require your attention. These include your incoming tasks, which you can immediately move to your calendar. Or, if you know that you'll get back to a task in a few weeks, you can schedule it in your plans for the upcoming week. And of course, you can place any task directly into your calendar by specifying the time for its execution. The task calendar syncs with Google Calendar, allowing you to connect it to any other task calendar from a different system or on your phone.

### Boards

[Boards](https://www.youtube.com/watch?v=bQrrE21XQ4U&t=65.0s)

The second section is boards. In boards, you can create both personal and collective boards for collaborative work or for organizing some business processes. Here, you can create absolutely any task columns, arranging them in a specific order and thus creating specific business processes. Not only can you create columns and tasks here, but you can also customize the display of task cards. You can specify the data you want to see on the task card, for example, simplifying the task card by leaving only the description or displaying more information, such as tags, comments, the presence of a checklist, its completion status, the responsible employee, and more. You can work with boards both with your colleagues and individually.

### Board Settings

[Board Settings](https://www.youtube.com/watch?v=bQrrE21XQ4U&t=108.0s)

It's worth mentioning separately that in boards, you can, of course, configure various levels of access and set up your additional fields. If you feel that the basic fields available in tasks are not enough, you can add as many custom fields as you need. You can make some of them mandatory, configure which fields should be displayed in tasks, hide those fields that you don't need on a regular basis, and fully customize the tool to suit your needs. Using boards, you can manage both personal tasks and build various business processes. You can organize collaborative work with your team on a specific project and visualize the process of any work in your company.

### Tasks

[Tasks](https://www.youtube.com/watch?v=bQrrE21XQ4U&t=142.0s)

Next, we have the "Tasks" section. Essentially, it's just a list of tasks where you can build various filters to find specific tasks. For example, all the tasks closed by your team last week.

### Plans

[Plans](https://www.youtube.com/watch?v=bQrrE21XQ4U&t=153.0s)

Then, there is the "Plans" section, which allows you to set and monitor the execution of plans for various tasks among your subordinates. You can also conveniently plan your own time. You fill in your plan based on the tasks you intend to complete in the upcoming period. By the end of this period, you will visually see what was planned, what was completed from that plan, what was not completed, and why. After you and your employee have created a plan, you can approve it to prevent the employee from making changes to the plan or removing tasks from it. This way, during the next meeting, you can be confident that no tasks were lost, and the employee couldn't manipulate or hide any unfinished work.

### Problem Visualization

[Problem Visualization](https://www.youtube.com/watch?v=bQrrE21XQ4U&t=195.0s)

And of course, in tasks, whether on the main page or in plans, the system always provides you with notifications about potential issues. For example, in a task that was previously in plans but wasn't completed, you will see a relevant notification. If a task is overdue, it will be highlighted in red and always appear at the top of your task queue because it requires your attention.

### How Plans Help

[How Plans Help](https://www.youtube.com/watch?v=bQrrE21XQ4U&t=216.0s)

With this tool, you can systematize the assignment and prioritization of tasks to your employees. Often, you communicate with an employee about a task in a corporate messenger, part of the task verbally, some tasks via email, and as a result, the employee gets confused. They are unsure about the specific priority of tasks they should focus on. When you meet with them to monitor the results, there are often situations where expectations diverge. The employee completes tasks they considered a priority, but you expected something completely different. The Plans tool completely solves this issue. Don't put it off; try creating a couple of tasks in Platrum today to see how convenient and flexible this tool is.

## 3.2 Tasks: Plans

[Tasks: Plans](https://www.youtube.com/watch?v=kKF0BKPyK\_M)

### Why You Need Plans

[Why You Need Plans](https://www.youtube.com/watch?v=kKF0BKPyK\_M&t=0.0s)

Hello! In this video, I will tell you about plans. With this tool, you can create a plan of tasks for the current working week, monitor their progress, and control the work of your subordinates. All employees can use plans, and managers have access to the plans of their direct subordinates through the drop-down list at the top.

### How to Fill Out a Plan

[How to Fill Out a Plan](https://www.youtube.com/watch?v=kKF0BKPyK\_M&t=22.0s)

On the page, there is a section for the actual plan itself. At the beginning of each workweek, it is empty and needs to be filled out. You can add tasks directly to the plan or fill them in from the lists on the right. Let's fill in the plan for this workweek.

### Categories

[Categories](https://www.youtube.com/watch?v=kKF0BKPyK\_M&t=45.0s)

By default, tasks in the plan are grouped into categories. In this project, there are four categories: tasks, projects, recurring actions, and training. You can either delete or rename these categories if the default ones don't suit your needs. You can also hide them in the plan settings. Let's hide the ones we don't need. Recurring tasks have their own category, and you cannot remove such a task from the plan. To do that, you need to remove the due date from the task.

### Task Sorting

[Task Sorting](https://www.youtube.com/watch?v=kKF0BKPyK\_M&t=86.0s)

Within the plan, there is a special sorting order. All tasks are sorted as follows: first, urgent tasks; then, overdue tasks from previous plans. The black dots under the task name indicate this, with the number of dots representing the number of plans in which the task was overdue. Finally, regular tasks. You cannot move a regular task above an urgent one. That's the essence of this sorting. It ensures that employees focus on urgent tasks first, then on tasks that are overdue from previous periods, and finally on standard tasks.

### Task Columns

[Task Columns](https://www.youtube.com/watch?v=kKF0BKPyK\_M&t=120.0s)

Now, let's talk a bit more about the panels on the right, from where we moved tasks. All tasks where the employee is the executor are placed in the task queue. Besides the queue, there are lists of subordinate tasks. If we add a task from this list to our plan, we automatically become co-executors of the task. In this list, tasks are included if the employee added them to their own plan. So, not all tasks end up here. Audited tasks are those where we are designated as an auditor. For example, if we assign ourselves as an auditor for a task, it will change its column to "Audited." You can also display panels with boards on the plans page. This is done in the plan settings. To do this, the board must be added to favorites.

### Plan Settings

[Plan Settings](https://www.youtube.com/watch?v=kKF0BKPyK\_M&t=178.0s)

Let's also discuss plan settings a bit. Here, in addition to adjusting the category and the panels themselves, you can also customize the plan's columns. For example, you can remove unnecessary fields. Additionally, if you've removed something unnecessary, you can add it back. You can hide or show tag names. Tasks in the plan can also be grouped by tags. If you hold multiple positions in the organizational structure, you will see several plans here. In this case, we have only one position, so only one plan is displayed. But if you have multiple positions, plans for other positions will appear here as well. You can also hide them in the plan settings. There's also an option to approve the plan. After approving the plan, we cannot remove tasks from it. The task removal button disappears, but we can add new tasks. These new tasks are highlighted in blue. This allows us to see which tasks the employee took on in addition to the previously established plan and how much time they spent on them.

# 4.Corporate University

## How to Train Employees? Corporate University

[How to Train Employees? Corporate University](https://www.youtube.com/watch?v=2SZMYKNSBQk)

### Types of Content in the Article

[Types of Content in the Article](https://www.youtube.com/watch?v=2SZMYKNSBQk&t=0.0s)

Hello, everyone! My name is Evgeny, and I'm the Director of Product at Platrum. In this video, we will explore how to build a corporate university in Platrum. First and foremost, we need to populate our knowledge base. Add all your materials here, including regulations, instructions, articles, videos, audios, tables, and images. The editor allows you to work with all the mentioned data types. Let's take a closer look.When creating each new content block, you can choose the type of that block. All types are located in the top panel and are also duplicated directly in the block itself if you hover your cursor slightly to the left and click on this arrow. The first types are headings; I believe they are self-explanatory. Next, we have plain text, quotes, and highlighted blocks for which you can select a specific color. There are various inserts for important information; please note that they are displayed correctly on a green background and incorrectly on a red one, and so on. We have unordered lists, ordered lists, and tables. A standard table starts as 2x2, and you can add an unlimited number of columns and rows to it. Next, we have a block for inserting images, code, embedding videos from YouTube, uploading audio files (which will be displayed as an audio player), uploading videos directly to the article without YouTube, loading data through iFrames (for example, you can load a Google presentation), uploading files (for instance, if your regulations refer to a contract template, you can attach it directly to the article for easy downloading). Next is the block with mentions. Here we can mention a user, a specific position. This is very convenient because if there is a change in personnel in that position, you won't have to go through all the articles where you mentioned that position and update the employee manually. It will automatically change in all mentions. You can also mention a specific article, meaning you don't need to insert a link to the article as an external reference; you can just mention an article that is also located within your project's knowledge base. This is also convenient because if you move that article somewhere else or change its name, it will automatically update in all mentions, saving you from the hassle of manually updating those links. Of course, you can also add regular links within the text to external sources. You can split the text into multiple columns in different proportions: 30/70, 70/30, and 50/50. There's also an option to undo or redo the last changes. Additionally, when you highlight text, you get the option to style it. You can make the text bold, italic, underline it, strike through it, or apply code formatting.

### Article Cover and Emojis

[Article Cover and Emojis](https://www.youtube.com/watch?v=2SZMYKNSBQk&t=172.0s)

You can add a cover or an image to your article. Let's take an article that currently lacks both a cover and an image. In edit mode, at the very top, we have two buttons: "Add Cover" and "Add Image or Emojis." When adding a cover, a default cover is immediately added. By clicking on it, we can change it and select either a colored background from the predefined options. The background can be either gradient or solid color. Alternatively, we can add an image here, upload our own image. Let's create a background like this. And here, we can add an image or emojis to make the article more lively and illustrative. For example, here we have a vacation guide. Let's use a more suitable image. Remember that the table of contents is generated automatically if you use block types with headings. For example, here we can see that the table of contents has been generated based on the headings defined within the article.

### If You Forget to Save Changes

[If You Forget to Save Changes](https://www.youtube.com/watch?v=2SZMYKNSBQk&t=232.0s)

An important point: if you have edited an article but accidentally closed the tab or forgot to save it, the system remembers this. For example, if we now edit an article about a vacation guide but don't save it, we see an icon indicating that there are some unsaved materials. There is also a reminder when you enter the article. If we go into edit mode, we will see our cover, which we didn't save.

### Knowledge Storage Structure

[Knowledge Storage Structure](https://www.youtube.com/watch?v=2SZMYKNSBQk&t=258.0s)

When populating your knowledge base with materials, it's crucial to organize them into the right structure. I recommend doing this in a way that mirrors your company's structure. For example, at the top level, you have departments, as demonstrated here in the sample data. Then each department is further divided into divisions. Divisions, in turn, can be divided into relevant areas. This gives you a clear and transparent structure. By the name of each area or folder with materials, it should already be clear which employees or positions should have access to them. Here, you can create an unlimited number of categories and subcategories to define the structure you need.

### Access to Sections and Articles

[Access to Sections and Articles](https://www.youtube.com/watch?v=2SZMYKNSBQk&t=297.0s)

After you've established the structure, you need to set the appropriate access permissions for each folder. Here's how I recommend doing it:

1. At the section level, such as a department, grant editing access to the head of that department. For instance, if we have the Personnel Department, let's give editing access to the Director of Personnel.

2. Then, open a category within the department, such as the Hiring and Training Department, and grant viewing access to all employees in that department. To do this, select the department head and enable the option to grant access to subordinates. This ensures that all employees under the department head can view the category. Additionally, grant editing access to the head of the Hiring and Training Department. By assigning an editor responsible for each category in this manner, you establish the following mechanism:

• The section leader can organiz and approve materials within their section and grant access to their subordinates.

• They can't accidentally grant viewing access to a regulation within their department to employees from entirely different positions. To do that, they would need to contact the knowledge base administrator. As an administrator, you'll set access permissions at the section level, and then delegate access organization within the sections to these employees. In this way, you create a clear hierarchy of responsibility without the risk of critical mistakes, such as making an important document public when it shouldn't be. You always know who has access to specific articles at what level. If we go into a specific article located within this folder and check its permissions, we'll see that the permissions are inherited from the parent category. By investing time in configuring the right structure and hierarchy of articles in your knowledge base, you'll create a system where each employee can access only the materials they need. The structure of folders and articles will also clearly demonstrate who a particular material is intended for and who should have access to it.

### Creating Questions for Articles

[Creating Questions for Articles](https://www.youtube.com/watch?v=2SZMYKNSBQk&t=558.0s)

After defining the structure and populating your knowledge base, you need to create assessment questions for each article. These assessment questions are located at the bottom of the article and are visible only to those who can create questions for articles. Regular readers of the articles, your employees, won't see these questions here. They will encounter them in courses when you create training courses. However, the article editor can see and edit these questions. Adding questions is straightforward. Click the "Add Question" button. Questions can be multiple-choice with single or multiple correct answers. You mark the correct answer(s) when creating the question and save it. Open-ended questions, on the other hand, don't require predefined answer choices; they only need a statement or question. There's also an option to request a file as a response to a question, making it useful for practical tasks. For instance, an employee might need to prepare a report, create an Excel sheet, download it, and attach it as a response to the exam question.

### Creating a Course

[Creating a Course](https://www.youtube.com/watch?v=2SZMYKNSBQk&t=633.0s)

After adding questions to the articles, the next step is to create assessment courses. I recommend creating courses using a similar principle. For example, let's create a basic hiring department course. Add materials, navigate to the relevant department section, which is under the HR department in our case. Open the category, and here, you can add individual articles by simply clicking on them or add the entire category. Since we're creating a basic course with all materials for the hiring department employees, let's add the entire category at once. This forms a minimal viable training course for your employees. As you can see, steps with articles have been automatically created. In cases where there were assessment questions in the articles, steps with tests have also been created. You can rearrange or delete steps as needed. What else can you configure here? You can provide a course description, which employees will see as the first step when taking the course. Here, you can include useful information, such as estimated completion time, course objectives, and more. You can also add an image if needed. Now, let's go back to the course list and see what our course looks like. We can see how courses with images appear. Let's check the course we just created. It currently has zero participants because we haven't assigned it to anyone yet. Let's do that. Go to the course, click on the "Participants" tab, and add the relevant participants. Since this is a basic hiring department course, we'll add all the members of the hiring department. After adding participants, you can see their progress and the points they've earned for correctly answered questions. From this point onward, the course is active. The specified employees will receive notifications that they've been assigned a new course. The course will be accessible to them in the "Academy" tab under "Active Courses." In this example, I have access to the "Getting to Know the Company" course. Since I'm not in a position related to the hiring department, I don't have access to our new course. Let's take a look at how the course appears to a participant using the "Getting to Know the Company" course as an example. As a course participant, I enter the course. Since this course doesn't have a description, I go directly to the first article. After reading the article, I click "Continue" to proceed after reviewing it and land on a test step. Here, I have a demonstration question. I'll choose the correct answer and continue. I move on to the next article, read it, and proceed to the test step.

### If you made a mistake while taking the test

[If you made a mistake while taking the test](https://www.youtube.com/watch?v=2SZMYKNSBQk&t=807.0s)

Let's try answering randomly to make a mistake. Here, I've made a mistake in the test, and the system tells me that the course will be locked for a certain period. You can set this time in the settings. In this case, I've set it to one minute so we don't have to wait for the specified time, but you can set it to any duration. The default is 15 minutes. The system takes me back to the previous article, and as you can see, I can't proceed further for now. It's assumed that within the next minute, I should review this article again, think about where I might have made a mistake, and wait for the next attempt to take the test. It's important to note that when retaking a test step, there are a few modes. By default, a simplified mode is enabled. If I had multiple test questions, and I made a mistake in one of them, the correctly answered questions will already be considered correct, and I'll only have to answer the question I got wrong. However, you can enable a stricter mode. In this case, the system won't tell me where I made the mistake, and when I return to the test step, I'll see the full list of questions again. The questions will be shuffled, and the answer choices will be shuffled as well, so I won't be able to remember that I answered the first question with the first and second options, and so on. But at the same time, this will require more time from your employees, so we've provided this as a separate setting. Let's take a look at it to have a clear understanding. You can find it in the Academy settings. Here, we set the duration of the course lock, and there's a checkbox that says "do not repeat questions that have already been answered." This checkbox controls the mechanics I described earlier.

### Employee's Perspective of the Exam

[Employee's Perspective of the Exam](https://www.youtube.com/watch?v=2SZMYKNSBQk&t=908.0s)

Let's now take a look at how the exam works from an employee's perspective. I have a course here with an exam question. Once again, I see an article, read it, and move on to the exam step. In this case, the exam consists of one open-ended question where I see the question formulation, and I'm required to provide a detailed response. Let's say I've provided my answer. After this, the system tells me that I need to wait and that I will receive a notification when my exam is evaluated.

### Exam Evaluation by the Trainer

[Exam Evaluation by the Trainer](https://www.youtube.com/watch?v=2SZMYKNSBQk&t=940.0s)

Now, let's take a look at this course from the perspective of a trainer. A trainer can quickly find employees who need to have their exams evaluated. In this case, it happens to be my user. We click on the "evaluate" button, see the question formulation, see the user's response, and here I can specify whether it was a correct or incorrect answer. In this case, I can then add a detailed comment because, in essence, this is part of the learning process – providing feedback on mistakes so that the employee can understand and avoid such errors in the future. If there are many questions, and evaluating them takes a considerable amount of time, I can save an intermediate result at any time to attend to other tasks and return to the evaluation later. Well, let's complete the evaluation and take another look at this course from the participant's perspective. We can see that in the course list, it's marked as "exam not passed." Let's enter the course. We can see the indication that the question was answered incorrectly. We see our previous answer and the trainer's comment on the mistake. I can proceed to retake the exam and change my answer. The process then repeats. The trainer will once again be able to evaluate this exam response and mark whether it was answered correctly or not. Of course, for the convenience of trainers and academy administrators, there's a mode where you can view courses in a table format with filters. There are various groupings available, such as grouping by participants, which allows us to see, for each participant, how many courses have been assigned to them, how many they've completed, and how many they haven't. For example, let's take a look at my profile. We can see that I have three courses, and I haven't completed any of them.

### Mandatory Courses - What Are They and How to Set Them Up

[Mandatory Courses - What Are They and How to Set Them Up](https://www.youtube.com/watch?v=2SZMYKNSBQk&t=1055.0s)

Let's also note that a course has additional settings. Here, you and I can set a deadline for completion. If an employee hasn't completed this course within the specified time after it's been assigned to them, their workspace will be locked. This is necessary for critical courses on fundamental documents that employees must complete before they can start working. Accordingly, this time frame starts counting from the moment the course is assigned to the employee. So, if a new employee arrives, and the course was created a long time ago with this setting enabled, they will still have, in this case, three days to complete it.

### Adding Questions When Modifying an Article

[Adding Questions When Modifying an Article](https://www.youtube.com/watch?v=2SZMYKNSBQk&t=1090.0s)

Another very important mechanic that brings significant benefits and demonstrates the connection between the knowledge base of the Academy and Platrum is the prohibition on making changes to an article in the knowledge base without adding questions. This prohibition can also be enabled in the Academy settings. Let's navigate there. Here, we see two additional checkboxes. The first one is a reminder to update tests when modifying an article, and this is how it works: if an editor adds five new words to an article, for example, you can naturally change the word count. The system will show a reminder, saying, "Look, you've made some significant changes to the article. Maybe you should update the test questions." However, this will be a gentle reminder that can be ignored. We can also prohibit changes to an article without additional tests. For instance, if an editor adds an article with forty words, which can be quite substantial changes, the system will require them to add questions; otherwise, it won't allow them to save the changes. This is where a very important mechanic comes into play. As soon as an employee adds a test question to an article that's already part of a course, all participants, even those who completed the course a long time ago, will have their progress updated. They will all receive a notification that additional content has been added to the material they needed to study, and they need to return to the course and complete it. They won't have to retake the entire course; they'll only need to answer the new test question. To do that, they will need to read the new material that was added to the course. This is a crucial mechanic that eliminates the risk of a change being made to a regulation unnoticed, even a potentially critical change.

### In Conclusion

[knowledge base main idea](https://www.youtube.com/watch?v=2SZMYKNSBQk&t=1198.0s)

Let's underline the main idea here. You establish the document structure in the knowledge base according to your company's structure. Of course, if there are documents that need to be visible to all employees, you can always create a separate section called "For All Employees," which will contain documents that everyone can see. Next, you assign the correct editing and viewing permissions to each section, folder, and category. For example, department heads can edit and view only the documents for their specific department. Similarly, leaders of smaller divisions can edit documents within their respective areas. Then, based on these organizational folders, you create educational courses. If you create a course that includes an entire category related to a specific job role, any new materials added to that category will automatically be included in the course. Furthermore, if you enable the setting that restricts significant document changes and requires the addition of questions, you create a self-sustaining system that grows and scales with your processes. You won't have to constantly administer the Academy. You've created an educational course, and as the number of materials in the folder grows and more questions are added, they will automatically become part of the course. The course will continually update whenever there are changes to your operational regulations and materials. No one in your company will go through outdated courses, and there won't be a situation where employees continue to work based on old scripts and methodologies simply because they were unaware of changes in the regulations. Lastly, the automatic knowledge control is another valuable feature. This feature allows you to set up the automatic creation of courses at specific intervals. You can specify how often these courses are generated, for example, every 30 days. You can also set a maximum number of questions in these courses to avoid disrupting employees' work too much. You can exclude specific departments that shouldn't be included in these automatic courses. Additionally, you can add a cover image to make these courses more visually appealing in the list. From this point on, every 30 days, for all employees who have ever taken courses (for example, if your CEO doesn't take any courses and is not involved in the Academy, they won't be affected), an automatic knowledge control course will be created. This course consists of random questions from the courses they've already completed. This ensures that employees can periodically refresh their knowledge and stay up to date with the latest information.

### Knowledge Base Reports

[Knowledge Base Reports](https://www.youtube.com/watch?v=2SZMYKNSBQk&t=1430.0s)

To have a clear view of the corporate university implementation processes, you can use the knowledge base report. In this report, you can see the number of tests and questions added to each article. For instance, we can see an article titled "Remote Employee Guide," and it doesn't have any questions added. With a high degree of probability, this indicates that no one will thoroughly read it, and no one will ever really understand it. However, since it's just a guide, you might tolerate this. Let's look at other documents. For example, we have a more serious problem. We see a document in the Customer Relations department titled "How to Deal with Clients." In my opinion, this is a fairly important regulation. However, we see that there are no tests added to it, and it's not included in any courses. This means that this regulation is most likely collecting dust somewhere. What's more, because you're not monitoring how well employees understand it, you don't even know if anyone has read it. If you add test questions here and include this article in a course, you will undoubtedly see the number of views for this article increase. In an ideal situation, the percentage of views compared to accessibility should always be 100%. This means that everyone who has access to the article should read it. If not, there is a problem.

# 5 Academy

## 5.1 Academy: How It Works

[Academy: How It Works](<https://www.youtube.com/watch?v=4WyDAauWzMc>

### What's the Problem?

[What's the Problem?](https://www.youtube.com/watch?v=4WyDAauWzMc&t=0.0s)

When you have a large number of regulations in place, two additional problems arise. The first is knowledge control among your employees. It's clear that you've granted access to a certain section, and an employee says they've read it and understood it. However, it's entirely unclear whether they've thoroughly studied it, whether they've grasped all the regulations, or whether an employee who read it a year ago has seen any updates since then. Currently, without automation tools, you would have to manually control this process—perhaps by asking employees to confirm that they've read and understood it or by other means. In general, you don't know if your regulations are being read.

### Our Approach to Knowledge

[Our Approach to Knowledge](https://www.youtube.com/watch?v=4WyDAauWzMc&t=62.0s)

Let me explain a bit about how we approach knowledge verification and inspection. First, a document is written. See, anyone can write a document, and tests are created for it. These tests, once again, are not visible to employees; only editors can see them. So, these tests are only visible to those who can edit the article. Employees don't answer questions during their knowledge base reading; they do it later in the academy. After we've dealt with the knowledge base, we need to create different verification questions based on job positions, or so-called position certifications. In the business world, we use this. For example, you can create a basic section called "For All Employees." It's like a job role folder, a folder for regular employees. In there, you can add documents like the company's goals, its history, and a couple of other documents. You can also add fundamental rules within the company and immediately write questions about them. You don't have to fill out the documents extensively; just create them so that they are visually available. Write a few questions, and then, for example, create a course in the academy called "Regular Employee Course." So, your company policy should dictate that every employee working in your company must know the company's fundamental rules. It's logical, right? Many companies have such folders.

### Academia: Common Issue

[Academia: Common Issue](https://www.youtube.com/watch?v=4WyDAauWzMc&t=169.0s)

However, there is a problem where the company's goals haven't been updated for three years, and the documents about the 2015 goals are still there. Or, for example, the document about the company's history hasn't been updated. Or, perhaps it has been updated, but none of the older employees have read this content. This is where those checkboxes I initially showed you come into play. We create a course, add another document, name it "Company History," and let's use an example to see how we can create a basic course within the organization. Okay, add one more question: "When was the company founded?"

### Creating a Course

[Creating a Course](https://www.youtube.com/watch?v=4WyDAauWzMc&t=238.0s)

After creating the basic documents, we proceed to create a course. Let's name it the main company course. Add the entire space right away. Add documents and click save. There you go, our course is ready.

### Granting Access to the Course to Employees

[Granting Access to the Course to Employees](https://www.youtube.com/watch?v=4WyDAauWzMc&t=270.0s)

Ah, we need to add it to job positions as well. Add it to all job positions. Take the owner and this checkbox. Did you explain what this checkbox means? Yes, I'll remind those who may have missed it. This means it's for the position and everyone under it. So, when we activate this checkbox, all employees under it are added. See, we created a course for all company employees, a great course. Now, everyone will have access to it.

### Knowledge Update Settings

[Knowledge Update Settings](https://www.youtube.com/watch?v=4WyDAauWzMc&t=307.0s)

Next, as the company evolves, new documents are added, and old ones change. This is where our checkboxes come to the rescue. We go to course settings and configure things such as, firstly, if... First, we definitely check the box for reminding to update tests when the article is changed. I believe it should be checked. Prevent changes to the article without adding tests. This should also be checked. I think you should show how this works. So, for example, add about 10 words there. Below, yes. Let's change 5 words and then 10 words. Why is this information needed? And you know what you can do? Do you remember I sent you a link to the company's history? Can you open that document? Friends, I apologize for disappearing. We have a document in the board. Copy the document, paste it here. It pastes it perfectly with images and everything. Quickly make adjustments. Edit it, remove a couple of extra paragraphs. There, we saved it. And now we see a notification that, buddy, you changed the documents. And what about letting all the other employees know about the changes? Please add a question. Add a question, for example. Come on, a new question. 1, 2, 3. Okay.

Firstly, what does this checkbox give you, and why is it so awesome? Because now, for everyone who has already completed the course, the course will no longer be active. This means they will clearly see that new information has appeared, and they missed it. Come on, take a look, please. The second situation is that it prevents cheating. For example, in a large company, there may be situations where we can't keep up with everything. Sometimes someone might make a mistake. This also often saves people. That's why I think these checkboxes are the main feature of managing knowledge in OrgStack. It's all about the knowledge base and the academy. I haven't seen such a product anywhere else. That's why we were so engaged when creating this product for you. Because we were solving our own problem first and foremost. We have several thousand documents in OrgStack. Half of them have long gone stale because no one updated them. If they were updated, no one knew about these changes. When we created this system where you can't save documents without adding tests and can't work if your tests aren't passed, it's just a killer feature. So, friends, this is a tremendously important feature of OrgStack. I highly recommend that you explore it and use it in your company.

## 5.2 Academy: Settings

[Academy: Settings](https://www.youtube.com/watch?v=eDWWqz2Hlkc)

### If an Employee Doesn't Remember What They Read

[If an Employee Doesn't Remember What They Read](https://www.youtube.com/watch?v=eDWWqz2Hlkc&t=0.0s)

For example, here I answered incorrectly. So, the system tells me that I made a mistake, and course progress is blocked for 15 minutes. They ask me to go back and read the previous article again. This 15-minute time period can be adjusted, you can set it as you wish, in the Academy settings. The duration of course blocking in minutes. By default, it's 15 minutes in all projects. Since we're in the settings, let me tell you about the other settings. There's a setting here that's enabled by default, which is not to ask already answered questions again. What does that mean? If, within a test, I have, let's say, 10 questions, and I answer them, and the system tells me I answered some questions incorrectly, it blocks the course, telling me to read the article again.

### What Happens with Correct Answers

[What Happens with Correct Answers](https://www.youtube.com/watch?v=eDWWqz2Hlkc&t=72.0s)

When I come back to this test next time, the questions I answered correctly will be closed by default. I won't need to answer them again, and my attention will only be required for the remaining questions. If I disable this setting, it's a stricter mode. When an employee returns to the test, all questions will be marked as unanswered again. Since all questions within a test are always presented in a random order, and answer choices are also randomized, this is done to prevent employees from sharing answers with each other. For example, one person passes the course, and everyone else just writes down the answers – first question, second option, second question, third option, and so on. As a result, it may seem like everyone has completed the courses, but nobody really knows the regulations. So, all answer options are shuffled, and this trick won't work. Consequently, if we don't indicate where the person made a mistake, they will have to answer a question they already answered correctly, and they need to be completely confident in their understanding; otherwise, they might try to answer the correctly answered question differently.

### How to Update Tests

[How to Update Tests](https://www.youtube.com/watch?v=eDWWqz2Hlkc&t=147.0s)

There's a setting "Remind to update tests when an article changes." What is this? This setting helps address the issue of updating a regulation when nobody knows about it. After you update a regulation, you either have to manually notify employees that a specific regulation has been updated and they need to review it, or employees must be highly conscientious and regularly check if any of the regulations available to them have been updated. Here, you can automate this process. You enable this setting, specify the number of words, after adding which the editor will see a warning that the article has been changed and probably needs a test question added. If "Remind to update tests" is enabled, the system will simply remind you, but it will allow the editor to completely rewrite the regulation, for example, without adding any questions; it will just provide a warning.

### Test for Implemented Changes

[Test for Implemented Changes](https://www.youtube.com/watch?v=eDWWqz2Hlkc&t=224.0s)

If you enable the setting "Disallow making changes to articles without adding tests," you won't be able to make any significant changes. By default, this setting is 40 words. If someone adds 40 words to a regulation, such as a paragraph of text, it's a substantial argument to add a test question. What happens when you add a test question? The course containing this article will automatically update, and all participants who have already completed the course will receive a notification that the course they previously passed has been updated and requires them to answer an additional question. So, it's a built-in mechanism for notifying about changes in regulations. It's also easy to monitor. If you see that an employee has uncompleted courses, it means either they didn't complete these courses at all or there was an update to a regulation they are not familiar with.

## 5.3 Academy: Knowledge Control

[Academy: Knowledge Control](https://www.youtube.com/watch?v=Ow3K61Bi1Xk)

### Introduction

[Introduction](https://www.youtube.com/watch?v=Ow3K61Bi1Xk&t=0.0s)

In addition to this, there is another mechanism that is very pleasing, for example, the inspection section. In the third department, we have an inspection section that should conduct weekly checks. Many, I think, know about this, or at least for many, this idea may seem reasonable, like you need to inspect knowledge, whether they have memorized it, and so on. Eugene, please show how to create a knowledge check course. Is it an automatic course? Yes, I understand. Anyway, while Eugene is clicking, just a second. Friends, this is pure delight. To confirm that people who have passed the tests, taken exams, haven't cheated, and want to confirm their knowledge with weekly checks, you can implement this thing. Eugene will now show how to actually set it up so that you can implement such a feature in your company that will completely relieve you.

### How Knowledge Control Works

[How Knowledge Control Works](https://www.youtube.com/watch?v=Ow3K61Bi1Xk&t=66.0s)

In the Academy settings, you have a separate section called "Automatic Knowledge Control." By default, it's turned off, but you can enable it, as I just did. There are three settings here. First, let me explain how it works in general. It automatically creates a course based on questions that an employee has previously answered. For example, an employee took a position a year ago, went through training, answered all the questions, and familiarized themselves with all the regulations. However, over the year, these regulations have changed significantly, or, as we described earlier, the changes in regulations are closed, but the employee may have simply forgotten. They read the document a year ago and may have forgotten what was described there, the specific processes, nuances, and so on.

### What's Included in Automatic Knowledge Control

[What's Included in Automatic Knowledge Control](https://www.youtube.com/watch?v=Ow3K61Bi1Xk&t=129.0s)

When you enable this automatic knowledge control, it creates a course once every few days, and the last setting, "Create a course" every X days, controls this. For example, I can set it to 10 days. A course will be automatically created every 10 days without your involvement, consisting only of questions. These questions are randomly selected from those the employee has previously answered among their completed courses. Consequently, the maximum number of questions here is understandable. If an employee has completed 20, 30, 100 courses over time, they may have a huge number of questions, and you can limit how many questions will be included in this automatic course. You can also specify departments for which these automatic courses should not be created. By default, tests will not be created for anyone who has not completed any courses. In other words, hypothetically, if you are the owner of a company who, for example, never completes any courses, you will not receive any notifications about the creation of new courses and so on. In general, there is no need to add the owner here additionally if, for example, they never complete courses. However, if there are employees who do complete courses but for some reason you want to exclude their positions from automatic test creation, you can exclude specific positions here.

## 6. Finances

### 6.1 Finances: Working with Transactions

[Finances: Working with Transactions](https://www.youtube.com/watch?v=rpGn7VvpPnU)

### "What Are 'Finances'"

[What Are Finances](https://www.youtube.com/watch?v=rpGn7VvpPnU&t=0.0s)

Good day, in this video, we will be discussing working with transactions in Platrum's financial module. In the finances section, you can manage transactions across three tabs – income, expenses, and transfers. Essentially, on each of these tabs, you can create and view transactions of the respective type. Each of the transaction list pages consists of a filter panel on the left side and a table on the right side where transactions will be displayed. In this case, I see a hint that I need to select some values in the filter panel and click the 'Filter' button to start. I see such a hint when I first access the corresponding page. All transactions are not loaded immediately for understandable reasons. If I haven't selected any filters or, for example, a filter for the year is selected, there could be tens, hundreds of thousands of transactions, and there's no point in viewing this entire list. Furthermore, loading it would take some time. So, for example, I won't set any additional filters and will click the 'Filter' button. I see that there are no transactions found. This is a new empty project, so naturally, I have no transactions here. If I had an open project where some transactions were created, as in this example, after clicking the 'Filter' button, I would see a list of those transactions, see their quantity at the bottom, the total amount, and the actual table displaying all other transaction parameters.

### Transaction Creation

[Transaction Creation](https://www.youtube.com/watch?v=rpGn7VvpPnU&t=82.0s)

So, let's try to create a transaction. Transaction creation is done by clicking the respective button, which is available on each of the tabs. In the transaction creation panel, we select the cash register where this transaction will be recorded. In this case, I'm creating an income transaction, so it's the cash register where this income will be credited. After choosing the cash register, I select the transaction type. In this case, I have only three types: income from the main product, from auxiliary sources, and investments. Let's say it's income from the main product. Next, in the "Amount" field, I specify the transaction amount. In the description, I can add some additional comments; let's make it "Receipt Report - Number XYZ." I can also specify the report date. The report date is a parameter needed so that the transaction is accounted for on that specific date in the reports. For example, the income might physically have come into our company yesterday, but the transaction is recorded only today. So, to ensure that this amount is visible in the reports for yesterday, I can enter the corresponding report date here.

### Transaction Editing

[Transaction Editing](https://www.youtube.com/watch?v=rpGn7VvpPnU&t=153.0s)

Now, we see our newly created transaction. I can edit it by clicking on its ID, on its number, and the transaction viewing panel will open. From here, I can click the "Edit" button and make any necessary changes.

### Transaction Copying

[Transaction Copying](https://www.youtube.com/watch?v=rpGn7VvpPnU&t=171.0s)

Additionally, from this panel, I can clone a transaction. When cloning, a new transaction creation panel opens with the same parameters as the previous one I am cloning. If I add it now, another transaction will be created. It's a separate transaction, but it has all the same parameters.

### Transaction Deletion

[Transaction Deletion](https://www.youtube.com/watch?v=rpGn7VvpPnU&t=194.0s)

To delete a transaction, I can either open a specific one and click the delete button, or I can select several at once. I can filter the transactions I need based on a specific parameter and delete the selected ones.

### Editing Multiple Transactions

[Editing Multiple Transactions](https://www.youtube.com/watch?v=rpGn7VvpPnU&t=209.0s)

Also, if I choose multiple transactions from the list, I can edit the selected ones. This can be useful if I need to modify a certain number of transactions that can be identified by specific filters. For example, if they all have descriptions containing a specific account number or specific text. For instance, it became clear that they needed to be credited to a different account. In our case, they were initially credited to the main cash register, but in reality, they should have been credited to the personal owners' cash register. When mass editing, if we want to change a specific field, we leave the other fields available for mass editing unchanged. Then, they won't be altered. We can see that in the modified transactions, the cash register has been changed to the personal owners' cash register.

### Expense Transaction

[Expense Transaction](https://www.youtube.com/watch?v=rpGn7VvpPnU&t=253.0s)

Let's try to create an expense transaction. The principle of creating a transaction is the same everywhere. However, in expense transactions, there are a few differences. Firstly, expense types can have multiple levels. For example, in the administrative department, we have types nested within an overall category, such as "office." We can only create transactions at the lowest level of expense types. This means that if we have multiple expense types within the "office" category, we cannot create an expense directly under "office" because it would be unclear to which specific type it belongs. Let's choose "office rent" as the expense type. Additionally, in expense transactions, there's a field for selecting a request. In this field, I can choose a request for fund allocation. This refers to requests created in the financial planning tool. Here, I can select a specific request that has been approved in financial planning. In this case, we can see that there is one approved request for 50,000 rubles. I select it, and based on this request, I create the expense. Let's enter an expense of 45,000 rubles here. I can also provide a description and a report date, just like in income transactions. Furthermore, for the request field, I can check the "Mark request as paid" box. By doing this, we indicate that this approved request can be marked as paid. Afterward, no more expenses can be recorded under this approved expense category. Now, let's create this transaction. We can see that it has appeared in the list. The table contains the same fields as in income transactions, but there is also a field for the request. I can directly access the corresponding request from here.

### Transfer Transaction

[Transfer Transaction](https://www.youtube.com/watch?v=rpGn7VvpPnU&t=359.0s)

Let's try to create a transfer transaction. In the transfer transaction creation panel, the difference lies in the fact that we choose two cash registers. We specify which cash register the money is coming from and which one it's going to. If we are transferring money between cash registers in the same currency, there will be only one field to enter the amount. However, if we are transferring to a cash register in a different currency, in this case, I'm transferring from personal owners to an account in dollars, we have two fields to enter the amount. The conversion is done at the current exchange rate set by the central bank. But there's an option to manually edit both amounts. This might be necessary when you are certain that 600 rubles were withdrawn from one account, and 7 dollars and 80 cents were deposited into another. This could be due to a different exchange rate or some other reason, and the automatic central bank rate doesn't apply. In that case, you can change the amount manually, which is what I did. Additionally, we can specify a description. Transfer types are typically not very diverse, but you can create a list and select one from it. In this case, I have only one transfer type called "Transfer," which was filled in automatically. Let's create the transaction and find it in the filter. Here, we can see the transfer transaction. So, we have covered the creation of all types of transactions, as well as deletion, editing, cloning of transactions, and mass editing through the table.

### Transaction Grouping

[Transaction Grouping](https://www.youtube.com/watch?v=rpGn7VvpPnU&t=450.0s)

In general, let's take a look at working with transaction lists. To do this, we will go into a project where some demo transactions have already been created. In each of the transaction lists, we have a first field in the filters - grouping. What does it mean? There are several values here. I can group transactions by creation date, by day, month, and year, or I can view them without grouping. Without grouping means it's just a list where each transaction is on a separate line. However, I can also group them, for example, by day. In this case, transactions are aggregated. For instance, I can see that on September 15th, there were a total of 507,000 transactions, with a count of 3. Why might this be useful? It's a form of reporting. It can be handy, for example, when you're looking at a report, like a balance sheet, and you see a discrepancy or can't immediately explain where a certain amount came from. By grouping them by days or weeks, you can pinpoint a moment when the deviation occurred and investigate further. So, for example, if we see that on the 18th, there's 112,000, but according to the bank statement, there were only 12,000 on that day. What can we do? We can select the corresponding number, display transactions without grouping, and then examine the transactions in detail to understand where they came from. You can also group transactions by month or year; essentially, it's the same concept, but if you choose a larger time frame, grouping by days might not be very informative.

### Other Filters

[Other Filters](https://www.youtube.com/watch?v=rpGn7VvpPnU&t=546.0s)

Moving on to the filters, we have filters both for the transaction date and the report date. The transaction date is when the transaction was created in the system, while the report date, as we discussed, is a date you can specify separately within the transaction. By default, it's always the same as the transaction date unless you specify otherwise. You can find a transaction by the author, the person who added it, by type, search for a specific word in the description, the corresponding cash register, or set a range for amounts. Essentially, the same filters apply to expenses, but there's a difference when filtering by transaction types. Here, we can search by categories. You might recall that in expenses, we had the category "office" with several subcategories. In this case, I can find all expenses related to the office category, for example. Additionally, I can find transactions by request. In transfers, we essentially have the same sets of filters. We can see from which cash register the transfer was made, to which cash register it went, the amount debited, and the amount credited to the respective cash registers.

### Deleted Transactions

[Deleted Transactions](https://www.youtube.com/watch?v=rpGn7VvpPnU&t=611.0s)

Another important aspect of transaction lists is the ability to view deleted transactions. How does this work? As you may recall, we created two income transactions. Let's delete one of them. So, I've deleted one of the transactions, and now I have only one left out of the two. However, transactions are entities that cannot simply be deleted, for understandable reasons. After all, these are financial records, and it's important to keep a history, even of deleted transactions. That's why a deleted transaction is not actually removed from the system; instead, it is marked as deleted, and a corresponding, let's call it an "anti-transaction," is created for it. As we can see, I had an income transaction of 5,000 rubles, and alongside it, a negative income transaction of -5,000 rubles was created. Both of these transactions together represent the deleted transaction. When I check the "Show Deleted" option, I can see everything that has been deleted. This is useful for historical purposes, to understand what was happening in the system. Perhaps you granted someone access to edit transactions, and they deleted something. With this feature, you won't lose the information; you can still copy and recreate these transactions if necessary, based on the recorded data. These deleted transactions do not appear in any reports, and they do not affect the system's functioning in any way. I believe that concludes our video on working with transactions.

## 6.2 Finance: Types of Transactions

[Finance: Types of Transactions](https://www.youtube.com/watch?v=V7KxSAR1R0g)

### Getting Started

[Getting Started](https://www.youtube.com/watch?v=V7KxSAR1R0g&t=0.0s)

In this video, we will explore configuring transaction types in finance. To begin with, let's take a look at setting up income types and transfer types. As a reminder, you can assign each transaction to a specific type. For instance, regarding income, in our case, there's income from the main product, income from the auxiliary product, and income from investments. These are the default values in any new Platrum project.

### How to Add and Modify Income and Transfer Types

[How to Add and Modify Income and Transfer Types](https://www.youtube.com/watch?v=V7KxSAR1R0g&t=22.0s)

To add a new income type, I click on the "Add New Type" button. Let's say this will be the third product. To create it, I click on the plus icon, or I can press Enter, and the type will be created. To delete it, I click on the trash can icon. However, if I delete a type that has transactions associated with it, it won't be permanently removed; it will remain in the system's deleted items. This is necessary so that when you review the transaction history, the type is correctly displayed for transactions created a while ago. Any type can also be edited by simply clicking on it and entering new text. Transfer types are set up in exactly the same way as income types. Here, we can add a new type, delete an existing type, or make changes to an old type.

### Expense Types

[Expense Types](https://www.youtube.com/watch?v=V7KxSAR1R0g&t=77.0s)

Expense types are a bit more complex. Within expense types, we have a breakdown based on job positions and departments within our company's structure. Additionally, we can create nested types. For example, in the PR sector, we have external and internal PR types. These are essentially subtypes under the PR expense category. I can further subdivide them by clicking the plus icon at the respective type level. So, if I click on the plus icon next to PR now, it will be some third type of PR. Well, external, internal, and let's make a third one. However, if I want to further divide external into several types, I can do that too.

I've created new subtypes within the PR expense category. Now, I can create transactions within the PR types: external - outdoor advertising, external - advertising integration, internal, and the third PR type. In the video explaining how transactions work, you will learn that transactions can only be created at the lowest level. In this case, it's the level of outdoor advertising, advertising integration, internal, and the third type. You cannot create an expense directly under the PR level because it wouldn't be clear whether it's related to external, internal, or something else.

### How to Add a New Department to Expenses

[How to Add a New Department to Expenses](https://www.youtube.com/watch?v=V7KxSAR1R0g&t=160.0s)

What else is there? To add a new department to which you want to attach expenses, click on the "Add New Block" button. Here, we have our standard dropdown list of job positions. For example, if I want to add some expense categories to the commercial department, I choose the option "Commercial Director" in brackets "Commercial Department." This means that I'm attaching these types specifically to the commercial department, not the director. For instance, let's add and create a new type for this position, for this department. Let it be an expense of the commercial department. Now, we see that a new expense has appeared. What else can we do? If we delete the only category, the corresponding department will disappear as well.

### Why Split Expenses by Departments

[Why Split Expenses by Departments](https://www.youtube.com/watch?v=V7KxSAR1R0g&t=217.0s)

Why split expense types by departments? Firstly, it allows you to conveniently examine and group your reports, such as VAT reports, by departments. In this case, your top-level report sections will be PR sector, partner sector, and the training and personnel development sector. This can be quite helpful. The main reason we split expense types by departments is for financial planning tools. More details about this tool and how it works will be covered in a separate video, but briefly, in this tool, any employee can create an expense request, a request to allocate funds to any expense type linked to a department within their vertical in the organizational structure. To explain this further, let's open the structure. For instance, if we have created expense types for the commercial department, the head of the marketing department can create a request in one of these expense types. Similarly, the head of the PR sector can also create a request within it. And let's say a sales group manager can also create a request in the commercial department for the commercial director. Therefore, it makes sense not to create expense types at a high level in the structure, such as at the level of the operations director and maybe not even at the department level but at the department sub-levels. This way, a hypothetical employee in the internet marketing sector won't be able to create an expense request related to sales. Because if we divide our expense types by departments, only the hypothetical cold sales manager can create a request for the sales department. Of course, the head of the sales department can also create requests linked to their department. However, technically, if we create certain expense types for the CEO, any company employee can create a request in that expense type. So, let's go back to configuring expense types. Currently, the division goes even lower, as we can see, for example, the PR sector has its own expense types. Consequently, nobody outside the PR sector can create requests in these types. The partner sector also has its own types. In principle, this kind of division can be quite useful as well.

### How to Move an Expense Type to Another Level

[How to Move an Expense Type to Another Level](https://www.youtube.com/watch?v=V7KxSAR1R0g&t=360.0s)

An important point is the ability to move an expense type, change its parent, and transfer it to another department or category. So, what do we see? We click on the corresponding icon for changing the location. Here we see, firstly, positions, so we can move it under a specific position. For example, let's start by moving it to the head of the procurement department. What will happen then? This expense type will move to the first level of the respective department. In other words, if we currently see that telecommunications and internet are nested expense types under the Office category, after moving it to another position or department, we will place this expense on the first level. Let's do this. We see that telecommunications and internet are now independent types in the procurement department.

### Logic of Expense Hierarchy

[Logic of Expense Hierarchy](https://www.youtube.com/watch?v=V7KxSAR1R0g&t=419.0s)

As we scroll through the departments listed here, we see that there are actually very few expense types. Why is that? Currently, you cannot move an expense type to the last level of another expense type. For example, we have an expense type for accounting services. Since transactions are created directly at the lowest level in the expense hierarchy, in this case, the expense for accounting services will be created within this type. However, for example, in the Office category, an expense can only be created for office rent, service licenses, equipment, or repairs. It cannot be created in the Office category itself. What's the point of this? If we assume that transactions are created at the lowest level, then you cannot move another expense type to that level. Otherwise, we risk creating a problem where we have some transactions already in the office category, and then we additionally add a child expense type here. So we move a child expense type here. This will cause problems because when we view various reports, we will expand our expense categories. For example, we can open the VAT report now. Firstly, we see the option to group expenses by departments, and then we conveniently see the connection of all expenses to a specific department that we specify in the settings. We will now turn off this filter and then look at expanding the Office expense category. We see that we now have specific transactions. By clicking on the amount, I can see the specific list of transactions. And I see that I don't have any transactions directly at the Office expense category level because they are not linked there. They are linked to the types of office rent, service licenses, equipment, repairs, telephone, and internet. If we move some other type under office rent, we will encounter a problem where we will expand the Office category as well. Our office rent will also have the option to expand, and we will have some transactions at the office rent level. This clearly indicates a problem because then the sum of all child expenses will not match the sum displayed for the parent expense type. In other words, if we now had another transaction type for the Office category, for example, for 10,000 rubles, we would see a total of 221,000 rubles here. And it would not match the sum of all the nested elements. So, you cannot move another expense type to the lowest level of expenses in another expense type. And again, let's return to the expense type settings.

### Using Examples for Clarification

[Using Examples for Clarification](https://www.youtube.com/watch?v=V7KxSAR1R0g&t=589.0s)

Now, knowing this mechanism, let's take another look at what we see in the parent change window. What do we see here? We see PR, PR external, partners, official surveys, and advertising. Let's see. Yes, we can move our expense type to PR because it has child types, meaning it is not the lowest level expense type. PR external is the same; it has child types. But in the case of external advertising and advertising integration, we cannot move it. If you need to do this, it is achievable. What do you need to do? You create a child type. For example, if you want to detail external advertising into subtypes, you create these child subtypes. Then you go to the list of transactions, find all transactions with the type external advertising, and through mass changes, you change their type to your new child type. Then external advertising will be available for you to move expense types from other departments or expense categories into it. Now let's continue. We can move partners to partners because there are child types here. Incentives, all accounting types, are not available here. What do we have next? Office is not available because we are trying to move an expense from the office. It is clear that moving from the office to the office makes no sense. We see advertising and internet advertising because they have child types. And official surveys because there is a child type, legal services. For example, let's try to move advertising integration to partners. We see that our expense type for advertising integration has been successfully moved to the partners' expense category. Naturally, all transactions associated with advertising integration will now be associated with the partners' sector and the partners' expense category in all reports.

## 6.3 Finances: Transaction Import

[Finances: Transaction Import](https://www.youtube.com/watch?v=8ZmhZnO9kk0)

### The Purpose of the Import Function

[The Purpose of the Import Function](https://www.youtube.com/watch?v=8ZmhZnO9kk0&t=0.0s)

In this video, we will discuss transaction import. With transaction import, you can upload dozens, hundreds, or thousands of transactions from an electronic spreadsheet at once, saving you the effort of creating them manually. The import function can be found on the page of the corresponding transaction type. You can import income, expenses, and transfers separately. However, let's focus on importing income.

### Import Interface

[Import Interface](https://www.youtube.com/watch?v=8ZmhZnO9kk0&t=23.0s)

The import page for all types of transactions is structured the same way and divided into three steps. In the first step, you can download an example file and click the "Import" button to select the corresponding file on your computer.

### Table Format for Import

[Table Format for Import](https://www.youtube.com/watch?v=8ZmhZnO9kk0&t=38.0s)

So, let's download the example and open it. You will download a file in CSV format. Such a file can be easily read in any spreadsheet software. In my case, I'm using Google Sheets. So, I've opened the file, and I see three rows in it. The first row contains headers, and they are clear: "Cashbox," "Amount," "Author," "Type" (transaction type), "Creation Date," "Report Date," and "Description." When you later perform the import, keep in mind that the first row with headers is not counted. The system doesn't automatically recognize the headers. The program always assumes that the first row contains headers. So, please be careful. If you upload a file where transactions start from the first row, you might miss the first transaction. How do we fill in these fields?

### "Cashbox" Field

["Cashbox" Field](https://www.youtube.com/watch?v=8ZmhZnO9kk0&t=88.0s)

The "Cashbox'' field is filled with a value that corresponds to the one in your project. In this case, I have a cashbox named "Main'' in my project, so I specify it here. You need to be careful and avoid any possible typos or errors because if there is a typo in the word, the program won't be able to match this cashbox with the one in the project, resulting in an error. By the way, you can include typos. During the import, we will see an error related to it.

### "Amount" Field

["Amount" Field](https://www.youtube.com/watch?v=8ZmhZnO9kk0&t=117.0s)

In the "Amount" field, you simply enter the transaction amount. Decimal fractions are separated by a period, which is important. The system does not recognize commas, spaces, or any other separators.

### "Author" Field

["Author" Field](https://www.youtube.com/watch?v=8ZmhZnO9kk0&t=128.0s)

The author of the transaction should also be specified by their name as it is in Platrum. For example, if the author's name in Platrum is "Maxim Kuzmin," writing "Maxim Kuzmin" here would be an error, and the transaction would not be created. However, if we do not specify the author, the person performing the import will automatically be assigned as the author, which is quite convenient. Often, when transferring data from another system, you want to preserve the entire history, including the authors. By the way, here, if you are transferring historical data and some employees who used to work with transactions in your company are no longer there, you can create corresponding users for them, set their names in the profile, and then remove them from the project. This way, the profile information will be retained, and you will see the names of the respective users in the transaction history, even though they are not added to your Platrum project.

### "Type" Field

["Type" Field](https://www.youtube.com/watch?v=8ZmhZnO9kk0&t=184.0s)

You should also specify the transaction type carefully, exactly as it is entered in your project. For example, in the demo file, we have the type "Payment from the client." Let's go back to our project, go to the settings, and look at the income types in this project. In this case, I have already created such a type, "Payment from the client." Let's assume that we don't have it. We have three types, and I want to create these incomes in the first type. I copy it exactly as it is entered in the program and paste it into the file.

### "Creation Date" and "Report Date" Fields

["Creation Date" and "Report Date" Fields](https://www.youtube.com/watch?v=8ZmhZnO9kk0&t=220.0s)

Next, there are fields for the creation date and the report date. By default, the creation date will be the same as the import date if not specified. However, if you are transferring transactions from another system and want to preserve the complete history, including when they were created and who created them, you can specify the creation date here if desired. Then it will be the date you enter. You can specify the date in two formats, and I will show an example with a different format using the report date. I can also specify the report date, as for the second transaction, for example. Here, I have provided two valid formats that the system recognizes. We can also try to create a few incorrect transactions to see how errors are handled during import. For example, we will add a comma here, write a nonexistent author, and specify a nonexistent type.

### "Description" Field

["Description" Field](https://www.youtube.com/watch?v=8ZmhZnO9kk0&t=278.0s)

Lastly, the last field is the description. Similar to when creating a transaction, it is not mandatory, but you can fill it in if desired. Here, you can simply enter some text.

### Saving and Uploading

[Saving and Uploading](https://www.youtube.com/watch?v=8ZmhZnO9kk0&t=288.0s)

Now I need to save this file again in CSV format. In Google Sheets, this is how it's done. We return to our project, go to expenses, to import, and try to upload our file again. So, we can see that an error occurred when analyzing the file. Here, we can immediately see the line number where the error was found and the error itself. What do we see? There is no user with such a name. As you recall, we deliberately corrupted one of the CSV titles. We can see that there is a comma in the sum, which the system did not recognize, and the system has alerted us to this. We can see that there is no user with such a name. And, actually, the transaction category with the incorrect type does not exist. From here, we can go to transactions, but in case of an error, transactions are not created. We can try again.

### Fixing Errors

[Fixing Errors](https://www.youtube.com/watch?v=8ZmhZnO9kk0&t=337.0s)

Naturally, before trying again, we need to fix the errors. And then we save the file again. Here, I'm not showing the window of how I select the file on my computer, but it's a standard interface that appears in your operating system every time you upload a file from your computer to an external resource.

### Successful Upload

[Successful Upload](https://www.youtube.com/watch?v=8ZmhZnO9kk0&t=363.0s)

So, we can see that the import was successful in this case. Two transactions have been created. Let's go to the transactions.

### What Completed Transactions Look Like

[What Completed Transactions Look Like](https://www.youtube.com/watch?v=8ZmhZnO9kk0&t=368.0s)

We can see that two transactions were successfully imported. We can see that the creation date we specified has been added. We also see that the report date we specified for the other transaction has also been set according to our input files. In principle, we have successfully completed the import. And this is how you can upload not just two transactions, but as many as you need. The only thing is, if your file contains a very large number of transactions, you may have to wait longer for the upload on the import page.

### Expense Import

[Expense Import](https://www.youtube.com/watch?v=8ZmhZnO9kk0&t=399.0s)

Now let's move on to expenses. In principle, it's exactly the same mechanics here. We can also download an example here. Let's open it in the table together. We can see that the table is basically the same, but the only difference is that with expenses, the types can have multiple levels. And this is demonstrated in the demonstration file. How does it work? Let's look at an example of expense transaction types in our project. So, we've opened the expense transaction types settings. We have several levels here. You can even create another one. What will the final type be that I need to import into? The type should reflect the full name of the transaction type. So, it will be "Advertising, Internet Advertising, CPA Networks" through the "Greater Than" sign. Now, we'll see how to fill in the format. And through the "Greater Than" sign — "CPA Networks." So, what will we get when we fill out the file? For the type we just created, "CPA Networks," the full name will be "Advertising, Internet Advertising, CPA Networks." Categories are separated from nested types with a space, the "Greater Than" sign, and another space. For the other fields, author, amount, cash, creation date, report date, and description, everything is the same as in income transactions. And, actually, the import process is absolutely the same. We probably won't do it separately here.

### Import of Transfer Transactions

[Import of Transfer Transactions](https://www.youtube.com/watch?v=8ZmhZnO9kk0&t=479.0s)

Let's take a look at the import of transfer transactions. Let's look at an example file for importing transfer transactions. The only difference here is that we have two cash registers and two amounts, for obvious reasons. And everything else—author, type, dates, and descriptions—the mechanics of working with them are exactly the same as with the other import files for income and expenses.

### Finance: VAT Report

[Finance: VAT Report](https://www.youtube.com/watch?v=4cqRpFm5Sqs)

### What's Included in the VAT Report

[What's Included in the VAT Report](https://www.youtube.com/watch?v=4cqRpFm5Sqs&t=0.0s)

In this video, we will discuss the VAT (Value Added Tax) report in Platrum. The VAT report is an automatically generated report that is structured quite simply. In this report, you will see three main groups of indicators: income, expenses, and profit. Profit is calculated as income minus expenses. The report is generated based on transactions that fall within the date range specified by you in the report date filter. These transactions are grouped by transaction types. Accordingly, income is grouped by income types, and we can see, for example, the main product and auxiliary product here. Expenses are grouped by expense types. As we recall, expenses can have a hierarchical structure, so, for example, I can expand "PR" and see subcategories here, such as external and internal. If these subcategories were further divided into some subgroups, I could expand further. In general, you control this yourself by configuring and specifying the structure of the expense types that you need. In this demo representation, expense types are only shown up to the second level.

### Data Grouping by Period

[Data Grouping by Period](https://www.youtube.com/watch?v=4cqRpFm5Sqs&t=66.0)

Horizontally, we have dates arranged. In this case, the report is grouped by month, so I see the reporting months. I have selected a period that covers April to September, so I see the months from April to September here. If, for example, I had chosen a different grouping, say, by year, then I would only see one year here because my selected period covers only one year. However, if I want to view the grouping by day, which makes sense when viewing a report for a short period, let's say, a week, if I group it by day, I see data for each day. If I have quite a bit, let's say, two weeks, in the report, I can scroll it horizontally. Let's change the date filter to generate a report for 6 months. We will revisit the filters in more detail later.

### More About the Data

[More About the Data](https://www.youtube.com/watch?v=4cqRpFm5Sqs&t=122.0s)

Now, let's take a closer look at the report. So, what do we see? For each month, we see the total values of expenses, income, and profit, as well as a breakdown by specific transaction categories. Some amounts are highlighted in blue, and we can click on them to see the list of transactions. Basically, this highlighting in blue indicates that at this level, you can view the list of transactions. For example, for the expense type "PR," this option is not available because it is broken down into two subtypes, and we can view the transactions for those subtypes directly. The purpose of this feature is probably clear to you, as you may want to see in more detail what makes up these sums, where a particular transaction came from, and so on. Here, you can see all the necessary information about the transactions: their number, creation date, cash register, report date, and a separate field that you can specify in each transaction in case the transaction is not created on the same day it actually occurred. For example, if you had an expense, funds were debited from your account yesterday, but you are creating the transaction today. To ensure that your reports display correctly, you can set the report date to yesterday. We also see the amount, the author who added the transaction, and the description. In this case, transactions simply don't have descriptions. You can also edit or delete a transaction from here if you have the appropriate access.

### Total Amounts by Categories

[Total Amounts by Categories](https://www.youtube.com/watch?v=4cqRpFm5Sqs&t=207.0s)

In the right column, we also see a certain total. For each row with a transaction type, it shows the total for all the specified periods. For example, for the expense type "PR," we see that over the past 6 months, we've had expenses totaling 890,800 rubles. At the level of the main expense, income, and profit groups, we also see the total for the selected 6-month period. Consequently, the top-right value in this case is our profit for the period you selected in the filter.

### Common Filters

[Common Filters](https://www.youtube.com/watch?v=4cqRpFm5Sqs&t=243.0s)

Now, let's take a closer look at the filters. Well, I think the report submission filter is quite self-explanatory. We've already covered this grouping with you. The transaction submission filter, on the other hand, allows you to switch between filtering transactions by their creation date or their reporting date, which I mentioned a little earlier. Thus, you can generate a report based on either the actual transaction creation date or the reporting date, which may differ from the transaction creation date. By default, the reporting date is selected here. If you have multiple projects set up in your finances, for which you are keeping accounts, you will also have a filter for projects. For example, if, within one business, you have several structural business units where independent activities are conducted, and you want to evaluate them financially separately, you can create multiple projects in the finance settings for this purpose. By default, there is always one project in your finance settings in Platrum, and it's called "Main," and the option to choose it doesn't appear anywhere until you create at least one more project. In this case, I have created two projects here: "Main Product" and "Auxiliary Product." Consequently, I can filter my report by a specific product. When nothing is selected here, we view the report for all projects. I repeat, this filter is optional, so if you only have one project, you won't have this field in your report.

### Currency Filters

[Currency Filters](https://www.youtube.com/watch?v=4cqRpFm5Sqs&t=328.0s)

Next, we have the "Currency Filter" and "Convert to Currency" fields. These are also two optional fields that only appear if your project has cash registers in different currencies. If all your cash registers are in the same currency, these two fields won't be there, I believe, for obvious reasons, as there would be nothing to filter or convert. In this case, I have multiple cash registers in different currencies in my project. I have ruble cash registers and dollar cash registers. How do these two fields work? The currency filter is quite straightforward. Here, I can specify a particular currency, and the transactions in the report will only include that currency. So right now, I'm viewing the report only for ruble transactions and ruble accounts. If I want to see the overall picture, I have the option to convert the amount to a specific currency so that it's convenient for me to view the total profit, expenses, and income. For example, let's select the Russian ruble again, and we can see that in September, some amounts have an icon. This icon indicates that this amount includes at least one transaction in another currency that was converted. It's a hint that the sum is originally not all in rubles; it might be in another currency and has been converted. Let's try opening the list of transactions with such an icon. As you can see, our last transaction in the expense type "Customer Refunds" has this symbol. Indeed, if we look at the cash register, it's called the "Dollar Account," and this transaction is actually in dollars, but for convenience, it has been converted to the currency I specified. So, if I want, I can convert everything to another currency. The exchange rate is taken according to the Central Bank of Russia. Again, you may not see these filters when you first enter the report. This is because all your cash registers are in the same currency, and you don't need these additional elements in the interface. As soon as you add a cash register in a currency different from the primary one, these corresponding filters will appear.

### Company Department Filter

[Company Department Filter](https://www.youtube.com/watch?v=4cqRpFm5Sqs&t=449.0s)

The last filter we see here is more of a mode to group expenses by company departments. In this mode, expenses are grouped by departments. In Platrum, expense types are linked to departments or any structural units from your company's organizational structure. These can be departments, sectors, or departments. You can learn more about this in the video about setting up expense types. But now, you can see that in the DDS report, you can group expenses by the departments to which you've assigned them. Then, you will see the department at the first level. For example, right now, I'll expand the PR sector, and there I'll see our PR expense category, which, in turn, breaks down into external and internal expenses. The same applies to accounting, the procurement department, and so on.

## 6.5 Finances: Balance Report

[Finances: Balance Report](https://www.youtube.com/watch?v=bP2cUnPWv-8)

### What is a Balance Report

[What is a Balance Report](https://www.youtube.com/watch?v=bP2cUnPWv-8&t=0.0s)

In this video, we'll look at how the Balance report works in Platrum. In this report, you can see how much money you currently have in your accounts and how much money was in each account at a specific point in time.

### Report Structure

[Report Structure](https://www.youtube.com/watch?v=bP2cUnPWv-8&t=13.0s)

First, let's take a look at the structure of the report itself. In the report, we display our cash registers, which are also referred to as accounts. Each row represents a separate account. We also have four main columns: "Start," "Income," "Expense," and "End." Let's go over what they mean.

• Start Column: This column represents the amount that was in this account at the beginning of the selected period. Currently, I have a specific day selected, September 28. Therefore, this is the amount that was in this account at 12:00:00 AM on September 28.

• Income Column: This column shows the total income into this account during the selected period.

• Expense Column: This column shows the total expenses from this account during the selected period.

• End Column: This column displays the balance of the account at the end of the day, for example, at 11:59:59 PM on September 28. Here, we've covered the top-level information in the report. This is the general information for each account. The first row also shows the summary information, which simply adds up the data for all the accounts. So, in the first row, the "End" column shows the actual amount of money at the end of the selected period. If you choose today in the report, for example, this sum represents all the money you have in your accounts. We'll go through the filter a bit later. Let's move on to explore the report structure further.

### Accounts in Detail

[Accounts in Detail](https://www.youtube.com/watch?v=bP2cUnPWv-8&t=98.0s)

I can expand each account. So, I've expanded an account. Here, I can see each individual transaction and how it affected the income and expense amounts for the specified period. Let's extend the selected period to have more transactions. Now, we can see that from September 25 to September 28, there were only expenses in the cash account. In each individual row, we see a separate transaction. The first column displays the transaction number. This can be useful if we want to find this transaction in the list of expenses and examine it in more detail or perhaps make some changes to it. We can easily locate this transaction by its number. Next, we see the transaction creation date, and we also see the report date. This is our standard field for all transactions, indicating the date for which this transaction needs to be included in the report. By default, it is always the same as the creation date, but you can change it if needed.

### Columns "Start" and "End"

[Columns "Start" and "End"](https://www.youtube.com/watch?v=bP2cUnPWv-8&t=153.0s)

Next, we see the duplication of "Start" and "End" columns for each row, which is very convenient. For example, the first transaction on September 25 had a balance of minus 71,523 rubles at the beginning of the period. There were no income transactions, but there was an expense of 1,800 rubles. We can also see what the balance became after this transaction. Consequently, for each transaction, we can see how it influenced the final account balance. This is very useful when we need to investigate discrepancies. If we look at our account, our bank statement, and notice some discrepancy in the amount, the "End" column makes it very easy to quickly find the transaction where something went wrong and then investigate that specific transaction. For example, let's open another account. Here, we can see both income and expenses. In this account, income is highlighted in green, while expenses are shown in red. In this account, we can see that there were also income transactions, and they even outweighed the expenses. At the beginning of the selected period, there was no money in this account. There was income, some expenses, but there is still a remaining balance at the end of the period.

### Nested Expense Categories

[Nested Expense Categories](https://www.youtube.com/watch?v=bP2cUnPWv-8&t=225.0s)

What else can we pay attention to? We can see that some transaction types are displayed with underscores. This indicates transaction types that do not fit entirely on your screen when displaying the report. Typically, these are expense types that have multiple levels of nesting. In Platrum, expenses can have an unlimited number of nested levels. Unlike income and transfer types, which are always single-level (e.g., income from the main product, income from bill payment, etc.), expenses can have a hierarchical structure. For example, we can see that we have an expense category type called "Partners," which is divided into payments to legal entities, and there may be other subcategories, such as payments to individuals or more specific subcategories. In the actual report, we see the lowest level, but if we need to see the complete names of this expense type, we can hover over it to view the full hierarchy.

### Date Filters

[Date Filters](https://www.youtube.com/watch?v=bP2cUnPWv-8&t=276.0s)

Now, let's move on to the filters. I believe the filter for the report date is quite self-explanatory. The transaction date filter, on the other hand, allows you to switch between filtering based on the transaction creation date and the report date I mentioned earlier. In other words, if you created a transaction today but want it to be counted in yesterday's report, you can specify a specific report date for it. By selecting the report date grouping in this filter, you will generate the report based on that date.

### Currency Filters

[Currency Filters](https://www.youtube.com/watch?v=bP2cUnPWv-8&t=306.0s)

Next, we see the "Total Currency" filter. This filter appears only if your project includes cash accounts in different currencies. So, if all your cash accounts are in a single currency, you won't have this filter because all your amounts are in the same currency, and there's no need to convert them to another currency. However, as you can see in my case, I have cash accounts in both rubles and dollars. Therefore, I have the "Total Currency" filter. What does it affect? It affects the total row at the bottom. As you can see, for the dollar account, the amount is shown in dollars, which is quite convenient because if we want to compare the actual balance of this account in the bank, we will see it in dollars. We can easily compare it with what's shown in our system without any conversion. However, to make it easier for me to analyze how much money I have on all my accounts right now, how much expenses there were, how much income there was, and so on, we can convert this amount to a specific currency. Here, I can choose any currency available for conversion according to the Central Bank of Russia's exchange rates.

### Cash or Account Filter

[Cash or Account Filter](https://www.youtube.com/watch?v=bP2cUnPWv-8&t=371.0s)

Next is the cash or account filter. In this case, I have a few cash accounts. If your project has a large number of accounts, you may want to view specific ones, and you can specify them here. You can also specify a particular account and then click the "Exclude Selected" checkbox, which by default will generate a report for all accounts except the one specified. This can be useful when you have many accounts, and it's easier to exclude two out of ten rather than add the other eight.

### Project Filter

[Project Filter](https://www.youtube.com/watch?v=bP2cUnPWv-8&t=405.0s))

Next, we have the project filter. Projects are an additional field in transactions that allow you to separate your financial activities into different directions. It's not about income types but larger divisions. For example, within one business, you may have entirely independent structural units. As a result of focusing on their structure, you can depict what projects you can count within a single project primarily, and this field would be unnecessary in the report.

### How to Hide Zero Rows

[How to Hide Zero Rows](https://www.youtube.com/watch?v=bP2cUnPWv-8&t=460.0s)

Next, there's a filter, and I think its purpose is clear from the name, "Hide Zero Rows." It simply removes the cash accounts for which we had no money at the beginning or end of the period, and there were no incomes or expenses. This is to make it easier to view information about current cash accounts without being cluttered by irrelevant ones. It's important to note how currency conversion works. For example, if we look at a report for some past period, let's say I'm generating it for September 25th. Unfortunately, I don't have any currency transactions here, but if they were present, the total amount would be converted based on the exchange rate applicable on September 25th. Therefore, to reiterate, the exchange rate used for converting amounts in this report is taken from the date for which I'm viewing this report.

### Access to the Report

[Access to the Report](https://www.youtube.com/watch?v=bP2cUnPWv-8&t=508.0s)

To conclude our discussion of this report, let's talk about how access to this report works. Compared to other reports like DDS, Monthly Plan, and P&L, access to the Balance report is slightly more complex. Apart from the checkbox in the access settings called "Access to the Balance report," you can configure access to each individual cash account. Here, I've opened the cash account settings page, and for each cash account, I can configure access separately. What's the purpose of this? Here, I can specify the roles that should work with this cash account, those who can create transactions in it, edit transactions from this cash account, and view the Balance report for this cash account. For example, I have a cash account called "Safe," and there's a responsible person who deposits money into this safe when needed and withdraws money from it to transfer elsewhere when necessary. Naturally, I want to give this employee access to the Balance report so that they can see the data for the Safe cash account. However, I don't want to give them access to data for all my accounts. So, I configure access for each cash account individually. For instance, right now, no access is selected for me here, and if I grant access to a certain employee to view the Balance report, they won't see anything because they don't have access to any of the cash accounts. I need to either grant them access to a specific cash account or I can assign this employee a separate access level called "Access to work with all cash accounts," and then they will see the report for all cash accounts. In conclusion, access to this report can be granted either to all cash accounts or to specific individual ones, which can be quite convenient when you selectively provide access to employees only to the information they need for their work.

## 6.6 Finances: Monthly Plan Report

[Finances: Monthly Plan Report](https://www.youtube.com/watch?v=smAuCGPo08I)

### Introduction

[Introduction](https://www.youtube.com/watch?v=smAuCGPo08I&t=0.0s)

In this video, we'll delve into the Monthly Plan report in Platrum. With this report, you can set and visually monitor your company's revenue plan execution. It provides a quick and convenient way to assess your company's revenue growth.

### Revenue on Business Days and Weekends

[Revenue on Business Days and Weekends](https://www.youtube.com/watch?v=smAuCGPo08I&t=14.0s)

Now let's take a closer look at the report. Here, you'll find three main indicators: Total Revenue, Average on Business Days, and Average on Weekends. Let's start by understanding these three indicators.Total Revenue: This is the total income for the month, which includes the sum of all income transactions for the month. The months are listed in the first column. Average on Business Days: This indicator represents the average revenue for one business day in the given month. Average on Weekends: This indicator represents the average revenue for one weekend day in the given month. The division between average revenue on business days and average revenue on weekend days is very useful. If you simply compare the overall revenue indicator from month to month, you won't be able to accurately assess how well you performed in each specific month. This is because each month has a different number of business days. For example, as seen in this report, May had 17 business days, while July had 23 business days. Therefore, comparing the revenue figures for May and July directly would be misleading. It's more informative to understand the revenue on business days and the revenue on weekend days separately. In this report, data is provided for companies that operate on weekends, so the average revenue on weekend days can be somewhat comparable to the average revenue on business days. For companies that do not operate on weekends or holidays, the average revenue on weekends would naturally be either lower or zero. To reiterate, comparing the total revenue from month to month or for the same month year over year is not appropriate because each month may have a different number of business days, and even one business day can significantly impact the total revenue. For instance, in February compared to January, there appears to be a decline in total revenue. Superficially, this might suggest that February was a worse month. However, if we look at the average revenue on business days, we can see that it increased. The same holds for the average revenue on weekend days. This indicates that in February, the company and its employees performed better than in January. The difference in total revenue is due to February having fewer days overall. In February 2020, there were only 29 days, which resulted in a slightly lower total revenue than the previous month.

### Dynamics of Days and Months

[Dynamics of Days and Months](https://www.youtube.com/watch?v=smAuCGPo08I&t=158.0s)

Now that we've covered the three main indicators, let's move on to the others. Dynamics shows the change in total revenue compared to the previous month. In other words, it indicates how much the revenue has changed in a particular month relative to the previous month. For example, looking at February, we can see that revenue decreased by 4% compared to January. In contrast, in March, revenue increased by 22% compared to February. The Workdays indicator is self-explanatory; it displays the number of workdays in that month.

### What Is "Base"?

[What Is "Base"](https://www.youtube.com/watch?v=smAuCGPo08I&t=184.0s)

Next, we have the Dynamics to Base and Base indicators. "Base" refers to a reference value, and it is assumed that you won't go below this value. The base value is calculated automatically and is the maximum value among all previous periods. Let's take a closer look. In the first month, which, in this case, is January when we started tracking data, there is no base because we don't have any revenue data yet. At the end of this month, we obtain certain revenue figures: total revenue, average on business days, and average on weekends. Now, let's examine the base for February regarding the "Average on Business Days" indicator. It is equal to the average revenue on business days for the previous period, which is January. This means that since we were able to earn, in this case, 114,824 rubles, we won't aim for anything less in February. We assume that we must generate at least this amount of revenue. The Dynamics to Base then shows the current average revenue on business days compared to the base. For example, in this case, we see that the average revenue on business days increased by 4% compared to the base in February. We now consider this increased value as the reference base value. We don't intend to go below this value in the following months because we plan for our company's revenue to grow month by month. As seen in March, the base value became the average revenue for February. In March, we increased by 17% compared to the base. This updated value now serves as the new base for April. This process continues each time we surpass the previous base value. However, if we look at a period where there is a negative dynamics to the base, the base value remains unchanged for the next period. The dynamics to base and base indicators work the same way for the average revenue on weekend days.

### Data Within the Period

[Data Within the Period](https://www.youtube.com/watch?v=smAuCGPo08I&t=295.0s)

Now, let's delve into one of the periods in more detail. Here, we see a detailed breakdown of this report by days. Each row represents an individual day of the month. Let's take a look at the indicators. Plan represents the revenue target we need to achieve. The plan is calculated as the base plus a certain growth percentage that you define in the report. In this case, the plan's growth percentage is set at 5%. This means that every month, we aim to exceed the previous maximum value by 5%. For instance, in September, the plan for a workday is 323,673 rubles, with the base being 308,260 rubles. We've added this 5% increase to the base to arrive at the planned value. In the Fact column, we find the actual generated revenue. In the Deviation column, both the percentage and absolute deviation from the plan are displayed. So, for September 1st, we observe a 25% increase or just over 79,000 rubles in deviation from the plan. In the Accumulative Plan column, we see the total planned revenue value we wanted to achieve by the end of the day. For example, on September 1st, we aimed to earn 323,000 rubles, and this accumulative plan equals that amount. On September 2nd, we have the same planned value, and the accumulative plan shows the sum of the two previous plans. This pattern continues, with each day adding its planned value. If we look at this indicator for the last day of the month, it will display the total revenue amount we need to earn for the entire month. The Accumulative Fact works similarly, but it takes into account the actual revenue transactions created. The Deviation works based on the same principles as the deviation for the plan and fact. Weekends and holidays are highlighted separately. By the way, you can customize weekends and holidays in the project settings under the production calendar section. If you work without weekends, by default, there will be five-day workweeks with two days off and holidays from the standard production calendar. The current day is marked with a green frame. You can also see future days here. For example, you can view your upcoming plan and cumulative plan values. This detailed view allows managers to monitor the progress of the plan at any time, particularly focusing on the "Accumulative Plan," "Accumulative Fact," and "Deviation" columns. Currently, as of September 29th, we are ahead of the plan by 5%, which is quite good. If we were to see a negative deviation here, it would signal the need to take measures to ensure the plan is met on time, especially if there are only a couple of days left in the month.

### Filters by Date, Type, and Project

[Filters by Date, Type, and Project](https://www.youtube.com/watch?v=smAuCGPo08I&t=467.0s)

Now, let's move on to filters. As I mentioned earlier, the growth percentage in the plan determines the percentage that will be added to your base value when calculating the planned value. When you change it, the values in the report are recalculated instantly. For example, if I increase the plan to 25%, we can see that the indicators immediately start falling behind the plan. This is clear because it's a very high growth percentage. The Transaction Date filter allows you to change the date by which transactions are considered in the report. Each transaction has two dates: the date it was actually created in the system and the reporting date, which you can manually specify during creation (by default, it's the same as the creation date). This reporting date is the one by which you want to see the transaction in reports. So, if, for instance, a transaction was physically created today but you want it to appear in the report as if it occurred yesterday, you can set the corresponding reporting date, and the report will group transactions accordingly. Next, we can filter our transactions included in this report by transaction types, specifically by income types. This might be useful if you have different income types based on various business activities, for example. In our demo data, we can see "Main Product" and "Investments." Of course, it might be interesting to see the overall situation, but it's more logical to monitor growth dynamics for each activity separately. This filter also has an "Exclude Selected" mode. If I check this box, I'll include all income types except the one selected in this field. The Project Filter, on the other hand, allows you to accomplish the same task but on a more global level. In Platrum "Finance," you can create multiple projects for each of your business directions to manage financial accounting independently. By default, there's always one project created in "Finance," and you won't see these fields until you create additional projects.

### Currency Filters

[Currency Filters]((https://www.youtube.com/watch?v=smAuCGPo08I&t=578.0s)

Next, we have the Currency and Convert to Currency fields. These fields won't appear by default in the report until you create cash registers in different currencies. If all your cash registers in the project use the same currency, there's no need to filter by currency or convert to another currency, as there's no conversion required. However, if you have cash registers in different currencies, you can use these options. In this project, for example, I have cash registers in rubles and dollars. I can now filter all incomes in dollars. Here, we can see that there are only income records for September in dollars, so some of the indicators are missing. We don't have a base, no dynamic calculation, and no planned value because, again, there's no base to rely on. If I want to view our results regarding revenue independently of cash registers, in other words, collectively for all accounts and currencies, I can convert the amount to a specific currency. For example, let's select the Russian ruble. As soon as I choose a specific currency, the currency filter is reset because they cannot work together. You either convert everything to a single currency, or you view a specific currency. In this case, I chose to convert to the Russian ruble, and we can see that the revenue in dollars for September, which we just saw, has been converted to rubles using the Central Bank of Russia's exchange rate. Now we see the combined revenue figures for ruble and dollar accounts simultaneously.

## 6.7 Finances: P&L Report

[Finances: P&L Report](https://www.youtube.com/watch?v=MH1ZiAvm7yw)

### Overview of Report Components

[Overview of Report Components](https://www.youtube.com/watch?v=MH1ZiAvm7yw&t=0.0s)

In this video, we will explore working with the P&L (Profit and Loss) report in Platrum. The P&L report allows you to take a detailed look at each stage in the transition from revenue to net profit. Unlike the DDS report, which includes three fixed indicators (income, expenses, and profit), the P&L report allows you to create any number of groups and intermediate stages, where you can calculate various indicators. As you can see in this demo example, we have gross revenue, then gross profit, followed by marginal profit, profit before tax, and finally, net profit. If desired, you can further detail this path from gross revenue to net profit. There is a wealth of information available online about working with the P&L report, its benefits, purposes, and basic construction principles. Here, we will focus on the technical aspects of setting up and using the P&L report in Platrum.

### General Report Settings

[General Report Settings](https://www.youtube.com/watch?v=MH1ZiAvm7yw&t=59.0s)

Let's move on to setting up the report. I've opened the P&L report settings. Here, we see a completed setup that exactly mirrors what we see in the report. In other words, we have the same gross revenue, gross profit, marginal profit, profit before tax, and net profit. However, I can assign each of these indicators the specific meaning I want. For example, in this case, we see that gross profit is calculated as gross revenue minus returns, while marginal profit is calculated as gross profit minus variable expenses, and so on. If I wish, I can edit all of this later. But we'll get to that a bit later. So, how does working with this page unfold? Initially, when you access this page with an unconfigured report, you'll only have the "Add Group" button and a list of ungrouped transaction categories. So, what can you do? You can create an unlimited number of income and expense groups here. You can also create groups here that are formulas, meaning they calculate their value by performing arithmetic operations on other groups. In this example, we have the "Gross Revenue" group, where I've placed all income types in this project. There's also a "Returns" group, where I've obviously placed the expense type "Customer Returns." We'll look at how to specifically assign transaction types to groups a bit later. For now, let's understand the principle of building the report. Next, I've created the "Gross Profit" group and specified that it should be a formula. This formula is calculated as the sum we receive in "Gross Revenue" minus the sum we have in "Returns."

### Setting Up from Scratch

[Setting Up from Scratch](https://www.youtube.com/watch?v=MH1ZiAvm7yw&t=152.0s)

Let's try to set up the report from scratch. So, I've opened the P&L report settings page in a project where P&L has not been configured yet. What do we see here? We see the "Add Group" button and ungrouped transaction categories. These are further categorized into income types and all other types, which are expense types. Typically, we have more expense types because, firstly, in Platrum, they can have a nested structure, as we can see here with PR (Public Relations) being divided into external and internal. And secondly, we usually have more expense items than income items.

### Adding a Group

[Adding a Group](https://www.youtube.com/watch?v=MH1ZiAvm7yw&t=186.0s)

Let's add our first group, and it will be "Gross Revenue." When I add a group, I can immediately specify that it's a formula. In this case, I'll need to define this formula, which we'll do a bit later. "Gross Revenue" is not a formula for me; it's simply the sum of all my company's income. Let's click the plus sign to create the group. Currently, we can move income types here right away. You can assign a specific color to each group. This color determines how the group will be displayed in the report. This setting primarily influences the visual aspect of the report. Let's choose a color like this, for example. Following the example of the report we viewed at the beginning of this video, let's add the "Returns" group. "Returns" are expenses, and expenses are typically colored in shades of red.

### Adding a Formula

[Adding a Formula(https://www.youtube.com/watch?v=MH1ZiAvm7yw&t=236.0s)

Now that I have "Gross Revenue" and "Returns," I can calculate the gross profit, which is calculated as "Gross Revenue" minus "Returns." Let's add a formula here. I create a "Gross Profit" group, mark it as a formula, and here's where we'll add the formula. When we edit a group with the formula type, other groups that have already been created display a plus sign. In this context, this plus sign means "Add a Formula." If I click on it, the group is added to the formula. Don't be intimidated by the notation in this field. The group is added based on a unique identifier, which is typically generated by transliterating the name of your group into Latin letters. So, it's generally easy to read, and making a mistake is unlikely. Next, I input the minus sign for subtraction and add the "Returns" group. We save the formula. We can see that we now have the "Gross Profit" formula. Its value is displayed in the tooltip. Since it represents "Profit," let's color it green. You can choose your own colors, but for now, I'll use the pre-set standard colors.

### Grouping Expense Types

[Grouping Expense Types](https://www.youtube.com/watch?v=MH1ZiAvm7yw&t=300.0s)

Next, let's create a group, for example, "Variable Expenses." By the way, we created an expense group called "Returns" but haven't added any transaction types to it yet. So, in the "Returns" group, let's add the expense type "Returns." Now we can see in parentheses that there is one expense type in this group. Under "Variable Expenses," let's add advertising, production purchases, and partner expenses. But let's pause for a moment here. When I allocate expense types, I can either assign the entire type along with all its subtypes or separate a specific subtype and place it in the desired group. In this case, I've done this with payments to individuals in the "Partner Expenses" category. Now, if we expand this group, we'll also see the "Partner Expenses" expense category here because our expense type for payments to individuals is not standalone; it's a subcategory under "Partner Expenses." Let's expand it and see our payment to individuals. However, there's one thing to note. We can see that "Partner Expenses" are not highlighted in the same way as the other expense types. This is because we divided the "Partner Expenses" group. This highlighting indicates that this category of expenses is entirely placed within the current group. For example, our advertising expenses are now entirely located in the "Variable Expenses" group. What's the purpose of this? In this example, there aren't too many expense types in general. In real business, you may have many more expense types, possibly even thousands. When you're setting up the report, there might be dozens or even hundreds of nested subcategories within a category of expenses. And you may not be aware that you've forgotten to place one of them in another group or in the ungrouped categories displayed at the bottom. This highlighting serves precisely that purpose. So now, if I were to move internet advertising to the "Returns" group, we can see that the highlight for advertising has disappeared, indicating that this expense type is no longer entirely within the current group. This full placement of an expense within a group also affects all new subcategories you create. Let's see. So, let's move advertising back. We can see that it's colored again. And let's try one more thing.

### Where Newly Added Expense Types Go

[Where Newly Added Expense Types Go](https://www.youtube.com/watch?v=MH1ZiAvm7yw&t=465.0s)

Now, let's add a new expense subtype to advertising. To keep it simple, I'll just name it "Third Type." Now, let's go to the settings. We open our variable expenses and see that the third type has automatically been added to the variable expenses group under the advertising expense category. This happened because we defined that all expenses on advertising are variable expenses. If I were to add a new subcategory to partners now, the software wouldn't be able to automatically determine where to place it because our partners' category is now divided, and only part of its expenses are in variable expenses. If I were to add a new subcategory to partners, it would go into ungrouped categories.

### Formula Using Data from Groups

[Formula Using Data from Groups](https://www.youtube.com/watch?v=MH1ZiAvm7yw&t=517.0s)

Now, let's add another group, "Gross Profit." Again, this will be a formula. In this formula, we will use the results of another formula, which is our gross profit. Let's add it. From gross profit, we subtract variable expenses, and we'll call this "Gross Margin." Save our formula. We can see that it's been added. Let's also set it to be green. I think we won't continue the setup further to distribute all transaction types completely, as we've already covered the principle.

### Summary

[Summary](https://www.youtube.com/watch?v=MH1ZiAvm7yw&t=555.0s)

So, let's summarize. We can create an arbitrary number of groups. We can make these groups formulas. We can sort the groups among themselves by simply dragging and dropping. For each group and formula, we can assign our color, just for visual representation in the report. Adding transaction categories to groups is done by dragging and dropping. So, I just take the transaction type I need and move it to the group. If I want to move it from this group to another, I can move it directly from here to another group. And if I realize that it doesn't belong in this group and I'm not sure where to place it right now, I can simply click the "X" to remove it from the group. Then, it will return to the ungrouped categories. Let's go to the report and see what we've got. We can see that the report has been generated immediately based on the settings we provided.

### Indicators for Ungrouped Expenses

[Indicators for Ungrouped Expenses]((https://www.youtube.com/watch?v=MH1ZiAvm7yw&t=600.0s)

What's distinctive here? At the very bottom of the report, you'll see indicators for ungrouped categories. This means that if you don't allocate some transaction categories or types to groups and don't use them in the report, they will still appear in the report. They will just appear at the very bottom so as not to affect your report's performance indicators. However, they will give you information that you still need to allocate transactions, and you need to fine-tune the report. In all other aspects, this report works exactly like the DDS report. That is, we can expand our nested expense types, view specific transactions that fall into specific amounts. In general, you can learn more about working with such a report by watching the video about the DDS report. The difference between the P&L report and the DDS report is that you create the income and expense groups that will be displayed in the report yourself. You also specify the formulas by which intermediate and final profit results in your company will be calculated.

### What is Expense Amortization

[What is Expense Amortization](https://www.youtube.com/watch?v=MH1ZiAvm7yw&t=672.0s)

Another important feature of the P&L report is that you can account for amortization here, which means spreading an expense over a certain period. Often, there are expenses that need to be accounted for over an extended period. For example, we make an advance payment for office rent for six months in advance. Obviously, all of this expense shouldn't immediately impact the profit figure for the specific month in which we incurred it. We're actually paying it in advance for six months, so we should distribute this expense over those six months. In the P&L report, you can do just that. Let's go back to the settings. This time, we need to go to transaction settings. Here, we see the option to "Amortize Transactions and Amortize Expenses." Let's enable it and see what it does. Let's find some transaction; it doesn't matter which one specifically right now. So, let's open a transaction and go into edit mode. Here, we have a checkbox for "Amortize Expense." We'll enable it, and a field appears for the "Number of Months." This is the number of months over which we should spread this expense. Let's assume this is indeed the office rent, and we're paying it in advance for 3 months. Let's enter 3 months and save. Now, let's go to the P&L report. Let's set a larger date filter because the transaction creation date was in September. With a filter set for October, we won't see the data with a 3-month advance. I've selected the end of November as the filter. We can see that we have future variable expenses. We can see that our expense, which was a return expense in October and November, is now displayed in the report as a total of 7,733 rubles. Let's see what transaction this is. It has a separate icon. When you hover over this icon, you see a tooltip that this transaction is another expense write-off based on a transaction, and the original transaction is displayed. Let's take a look at it. It was a transaction on September 25th for a total of 23,200 rubles. If we divide this amount equally over 3 months, we'll get approximately 7,730 rubles, which is what we see in October and November. Thus, by enabling the expense amortization setting and specifying the amortization period when creating a transaction, you can allocate your expenses that occur as a one-time, large sum over an extended period accurately. This tool will help you correctly account for these expenses in the report.

# Financial Plan

## 7.1 Financial Plan: Tool Overview

[Financial Plan: Tool Overview](https://www.youtube.com/watch?v=jioIk0370LI)

### Introduction

[Introduction](https://www.youtube.com/watch?v=jioIk0370LI&t=0.0s)

In this video, we will explore how the financial planning tool works in Platform. With this tool, you can take control of your company's expenses and set up a process where funds are allocated only for approved and justified funding requests. Currently, you are looking at the financial planning page with several demonstration funding requests.

### What Funding Requests Contain

[What Funding Requests Contain](https://www.youtube.com/watch?v=jioIk0370LI&t=20.0s)

First, let's start by examining what this tool represents using a pre-filled and configured example with some pre-created requests. You can see funding requests that are categorized by the expense type they are linked to. Each request is created not just for some abstract expense but for an expense tied to a specific type. For example, you can see that request number 10 was created in the "Office Rent" expense type. From this, we can infer that it's likely a request for office rent. Request number 11 is created in the "Office Licenses and Services" category. If we look at the request that's been generated here, it's for "Corporate Chat Payment." Let's get to know this page gradually. Here, we see our requests in separate rows. Requests are categorized by expense category. In this case, there is one request in each category, but there can be multiple requests in each category if needed.

### "Finplan" and "Requested/Paid" Columns

["Finplan" and "Requested/Paid" Columns](https://www.youtube.com/watch?v=jioIk0370LI&t=79.0s)

In the headers of the table, you can see the "finplan" column. This column represents the planning period. In this case, it's the planning period for the week that ended on September 30th. Planning periods in this tool are counted in weeks. The period's name is determined by the last reporting day of the week. In this project, the reporting week is configured from Thursday to Wednesday, so every Wednesday is the last reporting day of the week. You can see several periods here, such as the one ending on September 23rd, September 30th, and October 7th. Accordingly, in the "finplan" column, you see the period to which this request was tied. In the "Requested/Paid" column, you can see the requested amount and the amount that has already been paid. As we can see here, none of the requests, even the approved ones, have had actual expenses created yet. We will delve into how expenses are entered for requests in more detail shortly.

### "Request" Column

["Request" Column](https://www.youtube.com/watch?v=jioIk0370LI&t=132.0s)

In the next "Request" column, we see a brief description of the funding request. For example, if we see "Office Rent," it's clear that this is a request for office rent payment. Hovering over the request opens a pop-up window where we find additional information, including the problem or situation that this request aims to address and the specific solution. In the case of office rent, it's straightforward: the problem is that the office rent is ending, and the solution is to pay for it. Economic justification is not provided in this field, unlike the problem and solution. This field, unlike the problem and solution, is optional, and we will see it when creating requests later. For clear requests like office rent, you may not need to specify economic justification. However, if we look at the next request, payment for corporate chat, we can see that there is economic justification provided. It mentions saving time that employees spend daily searching for the right channel in Telegram because the company hasn't set up a corporate chat, and communication is happening on Telegram. In the "Created" column, we see the date the request was created. In the "Author" column, we see who created the request.

### "Approval" and "Status" Columns

["Approval" and "Status" Columns](https://www.youtube.com/watch?v=jioIk0370LI&t=199.0s)

In the "Approval" column, we see the approval chain for the request. The approval chain is configured by you to suit your needs. More details on how to properly configure the approval chain and how it works by default will be covered in a separate video. In brief, this chain consists of positions that must review and approve the request to move it to the "Approved" status. A request only transitions to the "Approved" status when it is approved by the last position in the approval chain, which is typically the head of the finance department. For example, we can see that the request for office rent was approved by the head of the administrative and economic department, but it also needs approval from the head of the HR department, the operations director, the accounting department, and finally, the head of the finance department. In this chain, our own participation in the approval is highlighted separately. A more prominent circle indicates our approval or rejection. For example, we can see that I approved two requests for office rent. I also rejected the request for office lock replacement. Specifically, for this request, we can see the reason for rejection. So, it's not just a rejected request; it also includes the reason. In this case, it was about replacing the lock, and the decision was to buy a new lock. This is a very illustrative request. If the decision had been made without involving all employees in the approval chain, those who made the decision might have allocated funds, not knowing that there were spare locks in stock, and we didn't need to buy a new one. In theory, every rejected request represents saved company funds. Expense types are further grouped into departments and organizational units to which these expenses are linked. For example, in this project, office expenses are linked to the administrative and economic department. Clear expenses related to accounting services are linked to the accounting department. This grouping is conveniently entered on this page, and you can see all expense requests for each department. In the "Status" column, we see the status of the request. There are only a few statuses for requests: "Under Consideration," "Approved," "Rejected," and "Paid." When we make the final expense transaction for a given request, it moves to the "Paid" status. At the very end of each row with a request, we see elements through which we can interact with these requests. If I participate in the approval chain, I will have corresponding icons. For example, we can see that the final position in the approval chain is the head of the finance department. I currently occupy this position as the logged-in user in this project. Therefore, I have the "Final Approval" icon. What does this mean? I can approve it on my own without waiting for all other positions, such as HR, the operations director, and accounting, to review and approve these requests. I can approve it immediately on my own. Alternatively, I can reject the request. In principle, it might happen that you initially glance at it and approve it, but then you learn some additional information or simply realize you made a mistake. In that case, you can reject the request, but you must provide a reason for the rejection. Rejected requests can be returned to work, but they will need to go through the entire approval chain again, which is also available on the request management page.

### Filters

[Filters](https://www.youtube.com/watch?v=jioIk0370LI&t=401.0s)

We have filters available. There's a filter for periods, and currently, we have a specific period open. There's also a filter for status, so you can view only rejected requests, requests in progress, approved requests, and so on. We also have a "Awaiting Approval" filter. In this case, none of the requests are waiting for my approval. How does this filter work? It shows only those requests in which, according to the approval chain, I am the next approver. In other words, this filter displays requests that are currently awaiting my approval. If I am the final approver, but some positions in the approval chain have not reviewed the request yet, this filter won't show it. Otherwise, the person responsible for approving requests finally would see absolutely all requests, which could be inconvenient. This filter shows a request only when all positions before mine in the chain have approved it, indicating that the request is only awaiting my action. Next, we have a search field for all periods. This is quite a handy feature; it searches not only in the currently open period but across all periods. You can enter a keyword from the problem statement, the solution, or the request name, and the relevant request will be found.

### Settings, Create, and Open Buttons in a Unified List

[Settings, Create, and Open Buttons in a Unified List](https://www.youtube.com/watch?v=jioIk0370LI&t=472.0s)

Next, we see an icon for accessing settings. Only those with access to financial planning settings will see this icon. We also see an icon for creating a request and an icon for opening a request in a unified list. We will explore request creation a bit further shortly. For now, let's fully understand what's on this page and what's available in the "Open All Requests in a Unified List" mode.

### Request Checkboxes

[Request Checkboxes](https://www.youtube.com/watch?v=jioIk0370LI&t=492.0s)

We haven't discussed yet what the checkboxes next to each request and expense type are for. With these checkboxes, we can select requests, specific expense categories, or individual requests—basically, any combination. For example, if I want to select all requests related to the administrative and economic department, I can click the checkbox next to that department. If I want to select all requests, I can click the top checkbox. Why might this be useful? I can give final approval to all requests if I have the authority to do so, given my position in the approval chain. I can also reject all of them, return them for further work, or delete them.

### Open All Requests in a Unified List

[Open All Requests in a Unified List](https://www.youtube.com/watch?v=jioIk0370LI&t=527.0s)

Now, let's switch to the mode where requests are displayed in a unified list. Essentially, this mode is our standard page found in many places. On the left, we have a filter panel where we can request various requests. On the right, we have a table with requests. Here, they are no longer grouped hierarchically by expense types and the positions to which these expense types are linked. Instead, you can conveniently search for requests across all periods. For example, we can find all approved requests together. I believe the filters are mostly self-explanatory. The search is a search by a keyword in any field of the request. Creation date, financial planning period, status, expense type, position to which the request is linked, author who created it, requested amount, and paid amount—all of these are understandable filters. "Waiting for My Approval" is the same filter as on the main page. By default, when we go to financial planning, the next period opens. In this case, there are no requests for me in the next period, so I see this message.

### How Financial Planning Relates to Other Functions

[How Financial Planning Relates to Other Functions](https://www.youtube.com/watch?v=jioIk0370LI&t=590.0s)

Now let's try to see how this works in practice. I have entered the project from the perspective of an employee who doesn't have any special access to financial planning. This employee, Evgeny Lensky, is located in the PR sector and is the head of the PR sector. Consequently, this sector is within the marketing department. Let's take a look at the expense types in this project. We can see that there are two expense types created for the PR sector: PR External and PR Internal. We also see that for the marketing department, which, as we recall, is the higher-level department relative to the PR sector, we have three more expense types: advertising, online advertising, and some third type related to advertising. Let's see what is available to our employee. So, I repeat, I am in the project under the head of the PR sector. Let's go to financial planning. Firstly, we can see that no periods are available to me because I haven't created any requests in any of the previous periods, and I'm not involved in the approval chain for any requests. Consequently, since I don't have any additional access to financial planning, such as viewing all requests, there are currently no requests available to me here.

### Creating and Configuring an Expense Request

[Creating and Configuring an Expense Request](https://www.youtube.com/watch?v=jioIk0370LI&t=661.0s)

By default, without special access, every employee in financial planning has access to requests they have created themselves, requests created by their subordinates, and requests in which they are part of the approval chain. Let's try to create a new request. We'll go through the fields in detail. The first field is the amount. Here, we specify the amount of funds we want to request. Next, we specify the currency. This field is optional and is displayed only if your project uses multiple currencies. In other words, if you have accounts in different currencies, the request will have a currency selection field. If you use the same currency everywhere, it will be automatically filled in by default. In this project, I have cash in rubles and dollars, so the system suggests I choose the currency. I select Russian rubles. The "Product/Service" field is where we provide a brief description of the request. Next, we have the "Type" and "From Position" fields. In the "From Position" field, we see the message "Select the type first." If I open the list of position values, nothing is available to me. If I open the list of expense types, I see the expense types linked to my position. I am the head of the PR sector. Therefore, I have PR External and PR Internal available here. It's worth noting that I can create a request for either the lower-level expense type or for the entire PR category. Why is it set up this way? Compared to transactions in the system, which can only be created at the lowest expense level (in this case, PR External and PR Internal), in this case, we can create a fund allocation request at a higher level because someone who will approve this request, especially someone who will be the final approver, like the financial director, doesn't need a detailed breakdown of expense types. It's sufficient for them to understand that these funds are allocated for PR. Then, as the head of the PR sector, you can independently allocate and spend them on external or internal PR. As soon as I select an expense type, the position is automatically filled in because it is linked to that expense type. If I held two positions simultaneously, such as head of the PR sector and the position of my boss, the head of the marketing department, I would have the choice between these two positions here. I could choose which position to create the request from. But let's go back to the list of types. Here, we also see the expense types of the higher-level department, namely, the marketing department, for example, expenses on advertising. This reflects one of the fundamental mechanics of financial planning. Employees have access to the expense types linked to positions in their organizational structure hierarchy. Since the entire marketing department has certain expense types, as an employee of the marketing department, I can create requests for these expense types. This is convenient because you don't have to break down expense types in detail across all your sectors and smaller divisions. You can link expenses to departments, and then every employee in that department can create requests in their desired expense category. The fact that I have access to, for example, offline advertising, doesn't harm anyone. If I create a request in this expense type, it doesn't mean it's an immediate expense; it still has to go through some approval process, and it can simply be rejected. However, all other employees who work in the marketing department, including those dealing with online and offline advertising, can create requests to allocate funds to the expense categories they need. This is how this expense type system works. Next, I need to describe the problem and solution. Then, I have the economic justification field, which we already discussed. I can fill it out if I want, but it's up to you and your internal regulations whether you make it mandatory for all requests. In some cases, an economic justification might not be needed, such as regular requests, for example, for salary payments. There's probably no need to provide an economic justification because it's clear that we need to pay employees their salaries. Next, I can add some attachments. For example, if this were a request for reimbursement of funds I, as the head of the PR sector, spent from my personal card, I could attach some receipts here. Finally, we can select the financial planning period. By default, the next period is selected. You can choose the current period, even the previous period for one week, or periods up to six months ahead. But the most common and typical case is creating a request for the next period. So, let's create it together.

### Employee Actions with a Created Request

[Employee Actions with a Created Request](https://www.youtube.com/watch?v=jioIk0370LI&t=931.0s)

We've created a request, and now, as the author, I have access to it in the "Financial Planning" section. In the list of periods, there's now the only period where I have at least one accessible request. As the author of the request, I can reject it if I realize that it's not currently relevant. I can also open, delete, or edit the request. To edit it, I need to enter the editing mode, where I have access to the same fields as when I initially created it. I can make edits and save them. Let's take a look at the approval chain. We see that the next person responsible for approving the request is the head of the marketing department, who is also my manager.

### Actions of the Department Head with a New Request

[Actions of the Department Head with a New Request](https://www.youtube.com/watch?v=jioIk0370LI&t=977.0s)

Now, let's switch back to the project from the perspective of the head of the marketing department. We can see that in the period starting from October 14th, there's this request created by an employee. There are three icons available to me: I can reject the request, approve it, or approve it finally. Why do I have the option to both approve and approve finally? As I mentioned before, I currently hold two positions in the organizational structure, serving as both the head of the Finance Department and the head of the Marketing Department. If I weren't in the Finance Department role, I would only have the option to approve (with a checkmark) or reject (with an "X"). Now, let's imagine that I've reviewed the request and want to approve it as the head of the Marketing Department. If we go into this request now, we can see in the history that Ivan Petrov, the head of the Marketing Department, approved this request on a specific date and time. This request's history displays the approval chain, which can be quite useful. You'll always have a record of when a request was approved or rejected. This information can be used for optimization, such as speeding up your request approval process.

### Notifications for New Requests

[Notifications for New Requests](https://www.youtube.com/watch?v=jioIk0370LI&t=1040.0s)

By the way, as an employee who was supposed to be the first to approve this request, I also received a notification. "A new request awaits your approval." Naturally, I'm not constantly on the financial planning page, checking for new requests. I'm busy with my own tasks, but when I receive a notification that a request is waiting for my approval, I can click on it and then either approve or reject it. Let's return to the project from the perspective of the PR sector head.

### When a Request Cannot Be Edited Anymore

[When a Request Cannot Be Edited Anymore](https://www.youtube.com/watch?v=jioIk0370LI&t=1068.0s)

We can see that an approval has been added, and we can see who performed it. If we go into the request, we can no longer edit it. I think the reason here is clear: someone has already approved it in the form they viewed it. If I were to make changes now, it would mean that the head of the Marketing Department approved something that they didn't see in its final form. If I need to make changes now, I would have to reject it myself, edit it, and send it back for review. Let's go back to this request as the head of the department and finalize the approval. The request is now in the "Approved" status, and there's an option to make a payment.

### What an Employee Sees When Their Request Is Approved

[What an Employee Sees When Their Request Is Approved](https://www.youtube.com/watch?v=jioIk0370LI&t=1108.0s)

Now, let's see what the author of this request sees. The request's author also received a notification: "The status of your created request has changed." Notifications for intermediate approval stages don't come through, but as soon as the status of the request changes, whether it's fully approved or rejected, the author receives a notification. Notifications work as standard within our system. You can configure them within the project in this panel. You can set them up to be sent to your email or as push notifications that appear in your browser. For me, as the author, after the request is approved, nothing really changes here since I don't have access to enter expenses or create an expense transaction. So, there's no icon for entering an amount. I can still reject it even after it's been approved. In essence, I can't do anything else here. For me, as the author, this request is considered successfully completed, and now I can expect the amount, in this case, 5000 rubles, for conference participation, as I stated in the request's purpose. What happens next with the request?

If you have any further questions or need more translations, feel free to ask!

### How to Enter Expenses for a Request

[How to Enter Expenses for a Request](https://www.youtube.com/watch?v=jioIk0370LI&t=1170.0s)

Next, we enter an expense transaction for this request. In other words, an employee with access to work with expenses can enter an expense transaction here. We'll delve into this in more detail in the next video because there are various nuances. Expenses can be entered either from the financial planning page or from the financial page. There are different settings, but in general, after a request has been approved, the person responsible for the actual payment of bills related to approved requests can enter expenses here. When they attempt to enter an expense for a request, the request is automatically linked to the transaction. They just need to choose a specific type. As you may recall, this request was created under the "PR" expense type, but when creating an expense, they need to specify what exactly the expense is for. Multiple expenses can be associated with one request, and there's no obligation to spend the entire 5000 rubles in one go. You can spend it in smaller increments. When making the final payment for this request, you can check the "Mark the request as paid" option, which will change the status of the request to "Paid." For example, if I create an expense transaction for 2000 rubles, we can see that the requested paid amount is now 2000 rubles. If we highlight this request, we can see an overall summary at the bottom. If I had selected multiple requests at once, I would see an overall summary for all of them. Here, we can see that only one request for 5000 rubles is selected. The actual amount paid for this request is 2000 rubles, and the outstanding amount is 3000 rubles. This is very convenient for budget management. You can select all the requests for the upcoming period, see their total amount, see how much has been paid, and how much still needs to be paid, and then compare that with the funds you have available. It's possible that some adjustments may be needed for these requests. f you have any further questions or need more translations, feel free to ask!

### Summary

[Summary](https://www.youtube.com/watch?v=jioIk0370LI&t=1286.0s)

Let's summarize what we've learned. With the help of this tool, you can control the allocation of funds within your company. Here's how it works: every employee who needs to request funds from the company for a particular activity can create a motivated request. They can describe the problem in the request, outline how they intend to spend the money, add economic justification if necessary, attach files, and create an expense request under an available expense type. For example, as we discussed earlier, a PR sector manager might create an expense request for PR activities, outlining the specific tasks they plan to address. Then, the approval chain you've set up will review the request and approve it if it's well-founded. Finally, your accountant or the person responsible for handling actual payments will enter expenses into this request. By default, this tool allows employees to create requests for available expense types without requiring special access. However, if neither you nor any higher-level department in your organizational structure has access to any expense types, you won't be able to create any requests. Notifications are sent to the author and to those who need to approve requests at each stage when necessary. When working with requests, you can view them either grouped by departments and types or in a table with various filters to make it easier to find requests for all periods and conduct analysis. For everything to work correctly, you'll need to set up the approval chain, which can be done on the financial planning settings page. You'll also need to configure the expense types, which are essential both for financial operations and financial planning. There are separate detailed videos on configuring expense types and financial planning that you can refer to for more information. If you have any further questions or need more translations, feel free to ask!

## 7.2 Financial Plan: Configuration

[ Financial Plan: Configuration](https://www.youtube.com/watch?v=0CLFKGlbp\_s)

### Who Finally Approves Expense Requests

[Who Finally Approves Expense Requests](https://www.youtube.com/watch?v=0CLFKGlbp\_s&t=0.0s)

In this video, we will explore the configuration of the financial planning tool in Platrum. Currently, we are on the financial planning settings page. Here, we have just a few settings, but they play a crucial role in how the tool operates. The first setting is called "Who finally approves?" and here we can add positions that will be responsible for the final approval of each expense request. Approval will take place in the order in which positions are listed in this field. For example, in this case, the Chief Accountant will first approve the request, followed by the Financial Director. If I want to change this order, I will need to remove these positions and add them in the reverse order.

### Other Settings

[Other Settings](https://www.youtube.com/watch?v=0CLFKGlbp\_s&t=42.0s)

The second setting is called "Who to hide in the approval chain?" Here, I can add positions that should not be visible in the approval chain of expense requests. We will go into more detail about these settings shortly. Additionally, there is a third setting called "Setting the category of requests. Display request categories up to the second level, inclusive." We will delve into this setting a bit later. Let's first see how to configure the approval chain. If you have any more videos or specific parts you'd like me to translate, please let me know!

### How does the approval chain work

[How does the approval chain work](https://www.youtube.com/watch?v=0CLFKGlbp\_s&t=65.0s)

To understand how the default approval chain for expense requests works, we need to take a look at the structure of our company. Let's examine the approval chain for a request created by, for example, an employee in the PR department. If we don't configure anything additional on the financial planning settings page, which we were just on, such a request would need to be approved by the Head of Marketing, the Commercial Director, the Chief Operating Officer, and the CEO by default. In other words, by default, all higher-ranking positions in your company's hierarchy need to approve the request, all the way up to the very top of your company's structure—in this case, the CEO. If, for instance, the request is created by the Commercial Director, then, of course, the chain will be shorter, but the principle remains the same. It must be sequentially approved by their supervisor, and their supervisor's supervisor, and so on. This is a simple and straightforward basic mechanism, where when an employee creates a request for funds, their immediate supervisor, and the supervisor's supervisor, and so forth, must approve it. Naturally, fewer and fewer requests reach each higher-ranking supervisor, as rejections may occur at earlier stages. Therefore, hypothetically, not all requests would reach the CEO, and an excessive workload wouldn't fall on their shoulders. Now, let's return to the financial planning settings page and take another look at the settings provided there.

### How to set up mandatory positions

[How to set up mandatory positions](https://www.youtube.com/watch?v=0CLFKGlbp\_s&t=149.0s)

In the "Who finally approves?" field, we can add positions that will come after the CEO in our case. So, when our default approval chain reaches the very top of the company's hierarchy, you can add additional positions that serve as final approvers. For instance, in this case, every request should be approved finally by the Chief Accountant and then by the Financial Director. I'll reiterate how this works. After being approved by the CEO, the request will still be in the "under consideration" status because, in the approval chain, we have two additional positions: the Chief Accountant and the Financial Director. продлить перевод

### To remove unnecessary positions from the approval process

[To remove unnecessary positions from the approval process ](https://www.youtube.com/watch?v=0CLFKGlbp\_s&t=195.0s)

Now that we've covered configuring "Who gives the final approval?", let's talk about setting "Whom to hide in the approval chain?" In this case, we are referring to positions that are part of the default approval chain, the one I just described. For example, here, the CEO has been excluded. This means that in this project, the workflow for processing requests for fund allocation operates without involving the CEO. If we revisit the company's structure and take another look at it, let's say an employee from the PR department creates a request, then it will first be approved by the Head of Marketing, followed by the Commercial Director, and then the Chief Operating Officer. Since we excluded the CEO, the request will then be approved directly by those positions you designated as final approvers. In this case, it was the Chief Accountant and the Chief Financial Officer. So, you can exclude any position from the default approval chain. Here, you can decide how it should work in your company, but the logic is quite straightforward. It's entirely possible that involving the CEO in relatively low-level processes, such as requests for funds to replace a broken lock somewhere in your office, is unnecessary. So, you simply exclude them from the approval chain. They will act as an observer in financial planning, able to view requests from various angles and see the overall picture, but their direct participation will not be required.

### Example of request approval

[Example of request approval](https://www.youtube.com/watch?v=0CLFKGlbp\_s&t=274.0s)

Let's take a look at one of the requests presented in this demonstration project. For instance, we can see a request that was created by an employee who is also the head of the PR department. We can see that this request was approved by the Head of Marketing and then immediately by the Chief Financial Officer. Additionally, if we review the entire approval chain, we'll see the positions I mentioned earlier: Head of Marketing, Commercial Director, Chief Operating Officer, Accounting (which is the Chief Accountant in our case), and the Chief Financial Officer.

In this case, for example, we can observe that the Chief Financial Officer approved the request as a final step, bypassing three other positions. This is an important point you should be aware of when configuring the system. The person at the final stage of the approval chain can independently approve any request without waiting for approval from lower-ranking positions in the chain. Typically, this is used for urgent fund allocation requests. Therefore, when configuring the final approval chain, you should keep this in mind.

Now, let's return to the settings and move on to the third setting we mentioned earlier – displaying the request category up to the second level, inclusive. Let's disable it first and see how financial planning will work without this setting.

### Types of expenditures and their levels

[Types of expenditures and their levels](https://www.youtube.com/watch?v=0CLFKGlbp\_s&t=352.0s)

Let's try creating a new request and take a look at the available expense types. Expense types are configured simultaneously for both finances and financial planning, and you can find more detailed information on configuring expense types in a separate video. Here, I'll mention that in Platrum, expense types are linked to departments and divisions within your company's structure. For example, as we can see, purchasing for production is linked to the procurement department, while staff recruitment expenses are linked to the hiring and training department, and so on. This is the first characteristic. The second characteristic is that expense types can have multiple levels. On the left side, you can see several requests that were created with expense types like office rent, office service licenses, and office repairs. So, the office expense type is quite broad, and in this case, it's been broken down into several subcategories, such as office rent, service licenses, repairs, and more. Each of these subcategories can be further detailed if necessary. Essentially, there are no limits to the level of expense subcategories you can create. However, as you can see, in the field for selecting the request type, I can only see the top-level type. In this case, I see "office," but I don't see the subtypes like office rent, service licenses, repairs, etc. This is regulated by the setting we disabled earlier.

### To simplify the interface

[to simplify the interface](https://www.youtube.com/watch?v=0CLFKGlbp\_s&t=429.0s)

In general, when working with expense requests, there's typically no need to create a request for the most detailed expense type directly. In most cases, for those who approve requests, seeing a request categorized as "office" with a description of "office rent," for example, is sufficient to understand what the request is about, how the money will be spent, and whether it should be approved. Therefore, to simplify the interface when working with financial planning, if you disable this setting, expense types will only display at the first level, without deep detail. Now, let's go back to the settings and enable this checkbox. As you might guess from the name, when enabled, this checkbox allows you to create requests within the subcategories of expenses. Let's open the new request panel again. Here, we can see that I can create a request for "office" as a general category, but I can also specify it further. Is it for office repairs, payment for phones, internet, equipment purchases, or something else? Even if your subcategory detail goes even further, it's unlikely that creating a request with the most detailed type, such as "office equipment," "printer," "model XYZ," would make sense. The expense type is used primarily to group requests by common attributes. In this case, we have expense requests related to the office, PR, expenses related to partner collaboration, and so on. In summary, if you disable this checkbox in the settings, you will only see the top-level expense types. If you enable it, you will see subcategories up to the second level.

### Categories of requests

[categories of requests](https://www.youtube.com/watch?v=0CLFKGlbp\_s&t=527.0s)

Now, let's return to the financial planning settings. What we haven't discussed yet is the hint that categories of requests correspond to expense categories in finances and can be configured on a separate page. Here, we can see the configuration of expense types and the hierarchy of dividing them into categories and subcategories, as I mentioned earlier. For more details on configuring expense types, please refer to a separate video.

## 7.3 Financial Planning: Entering Expenses for Requests

[Financial Planning: Entering Expenses for Requests](https://www.youtube.com/watch?v=BmqF2xw-q64)

### Beginning

[Beginning](https://www.youtube.com/watch?v=BmqF2xw-q64&t=0.0s)

In this video, we will explore the integration of the FinPlan and financial tools in Platrum. I already have the financial planning tool configured here, and some demonstration requests have been created in it. These requests have been finally approved so that I can enter expense transactions for them. I want to clarify that in this video, we are specifically looking at entering expenses for requests and the interaction between the finances and FinPlan tools. If you want to learn how to configure the financial planning tool or how to work with it in general, please refer to separate videos with appropriate titles.

### Required Permissions

[Required Permissions](https://www.youtube.com/watch?v=BmqF2xw-q64&t=33.0s)

Before we start creating expenses for any of these requests, let's go over the permissions I, as an employee responsible for this task, should have. First, I need permissions to enter the paid amount for a request, which is granted through access to the FinPlan category. Optionally, I should also have access to all cash registers since I need access to a cash register to enter expenses into it. This access can be achieved by either having access to all cash registers or specific ones configured on the cash register settings page. In this case, I have access to all cash registers, so there are no separate permissions specified on the cash register settings page. In essence, having these two permissions is sufficient for me to enter expense transactions for requests.

### Entering an Expense from the FinPlan Page

[Entering an Expense from the FinPlan Page](https://www.youtube.com/watch?v=BmqF2xw-q64&t=80.0s)

Now, let's return to our demonstration data and see what we have here. We have four requests in different categories with different amounts, all fully approved. For each of them, I see a corresponding icon to create an expense transaction, which I can click to open the expense transaction creation panel. The same panel is also available from the finances page to enter an expense. A distinctive feature when creating an expense from the financial planning page is that you can see very clearly and conveniently for which specific request you are entering the expense. You can see the requested amount and the amount that has already been paid. In this case, for the request I have currently opened, nothing has been paid yet, and the requested amount is 7,000 rubles. The request field is automatically populated with the value of the request for which you are about to enter an expense.

### Expense Parameters

[Expense Parameters](https://www.youtube.com/watch?v=BmqF2xw-q64&t=133.0s)

Now, let's take a look at the panel. The cash register field is filled with the default cash register value. If needed, I can change it here. The type field allows you to select the expense type we are creating. Since our request is already created in a specific expense type, "staff recruitment" in this case, we don't have much to choose from. We simply select the "staff recruitment" expense type. Next, we have the request field where we can specify the amount for which we are creating the expense. Let's say it's 5,000 rubles. It's not mandatory to create an expense for the exact amount requested. Firstly, the requested amount might have included a small buffer, and secondly, it might encompass multiple expenses. So, let's create an expense for 5,000 rubles. Here, we see the checkbox "Move the request to paid." I think its purpose is clear. Once I create a transaction with this checkbox enabled, the request will change its status to "Paid." If I create a transaction without checking this box, the request will remain in the "Approved" status, and only the paid amount will be reflected. Let's skip filling out the description and leave the report date unchanged. We won't amortize this expense either.

### How Partial Expenses Are Displayed for a Request

[How Partial Expenses Are Displayed for a Request](https://www.youtube.com/watch?v=BmqF2xw-q64&t=217.0s)

We create a transaction, and we see the notification "Transactions created successfully." We can see that the amount already paid for the request is reflected. By the way, if we select all the requests now, we will see that we have requests for a certain amount, factually paid for a different amount, and there's still an amount left to pay. This is quite convenient for those who are responsible for entering expenses based on an approved payment table because it immediately shows how much is left to be paid for approved requests.

### Out-of-Plan Expenses

[Out-of-Plan Expenses](https://www.youtube.com/watch?v=BmqF2xw-q64&t=247.0s)

Now let's try to enter another expense. Again, we choose the type, let's say it's 3,000 rubles. And yes, if we enter another 3,000 rubles, we will exceed the budgeted amount. By default, you can do this, but later on, you can enable a setting that will prohibit employees who submit expenses from exceeding the approved amount. But we'll get to that later. For now, let's try to create an expense slightly higher than the approved amount. We check the "Move the request to paid" checkbox and create the transaction. So, I've created the transaction. We can see that the paid amounts exceed the requested amounts. The status of the request has changed to "Paid," and there are no buttons for making changes or adding expenses to it because this request has been finally paid. Essentially, it's now just a historical record.

### Expense Requests in Foreign Currency

[Expense Requests in Foreign Currency](https://www.youtube.com/watch?v=BmqF2xw-q64&t=304.0s)

Let's take a look at a request in a different currency. My previous requests were in Russian rubles, but this request is in euros. Let's see how this affects things. We can see that the default cash register did not populate, and in the list of cash registers, we see only one - the euro bank account. How does it work? The list of cash registers available for selection in this field is determined based on the currency specified for the request. When we create a request in a project with multiple cash registers in different currencies, we have an additional field for selecting the currency. So, if we have a request in euros, we can only create an expense from the euro bank account. In this case, all the ruble cash registers have disappeared from the list, and I can only create an expense from the euro bank account. By the way, sometimes a situation may seem like an error. If you had a cash register in euros in your project, then you created a request in euros, and later you deleted that cash register, when you open the expense creation panel for this request, you won't see any values in the list of cash registers. But this is because you simply don't have a cash register in the corresponding currency.

### Entering Expenses from the Finances Page

[Entering Expenses from the Finances Page](https://www.youtube.com/watch?v=BmqF2xw-q64&t=377.0s)

But you can create expenses for requests not only from the FinPlan page. From the Finances page, in the Expenses tab where you create expenses, you can also choose a request. However, this field is not currently mandatory, and it doesn't pre-fill with any value. As long as I haven't selected a specific request, I have access to all the types in this project. If I select a certain request, the field for choosing types becomes limited. For example, this "Direct Procurement" request was created in the "Advertising" type. In our project, this type is further detailed into "Online Advertising" and "Offline Advertising," so I have access to both of these expense types in the "Advertising Expenses" category. These two fields work in reverse connection. Once I select a specific type, let's select "Online Advertising," the field for selecting requests becomes limited. In general, the principle is the same. We choose a request here if we want to create an expense under a specific request. We can check the "Move the request to paid" checkbox, specify the amount, and so on. For convenience, in the request selection field, we can find a request by its identifier. For example, I entered the request number 12, and I found that request. Let's create some expenses.

### How to Find an Expense by Request

[How to Find an Expense by Request](https://www.youtube.com/watch?v=BmqF2xw-q64&t=454.0s)

Of course, on the expenses list page, we can find an expense related to a specific request. In our case, there was a "Direct Procurement" request. Let's try to find a transaction. Yes, we found the transaction. In the transaction list, a separate column displays the related request or requests. You can link an expense to several requests simultaneously, as we will see a bit later. From here, you can also open the request in a new tab by clicking on the link to that request.

### Transaction Settings

[Transaction Settings](https://www.youtube.com/watch?v=BmqF2xw-q64&t=482.0s)

Now let's move on to the settings. We are not talking about financial planning settings here; we are talking about settings related to the integration of finances and financial planning. These settings are located in "Financial Settings" under "Transaction Settings." We will focus on the first four settings.

1. Disallow creating expense transactions without requests: This setting is quite self-explanatory. If you enable this option, it will be impossible to create an expense without a approved request. Enabling this makes your financial management stricter and, perhaps, more accurate. Even if you consciously disable this option, you should have a clear understanding of who manages the process and makes the final decision to create an expense without an approved request.

2. Allow entering expenses for multiple requests at once: This setting allows you to create expenses for multiple requests simultaneously. You can select as many requests as you need when creating an expense. This can be useful for scenarios where you want to combine expenses for various requests into a single transaction.

3. Disallow entering expenses greater than the approved request amount: As discussed earlier, this setting restricts expenses from being entered for an amount greater than the approved request. It's another way to enforce financial discipline and prevent overspending.

4. Don't restrict the expense type within the approved request: Normally, when creating an expense for a specific request, you can only choose expense types related to that request's category. Enabling this setting removes that restriction, allowing employees to select any expense type when creating expenses for requests. This setting is useful for specific use cases and should be used with caution.

These settings provide flexibility in tailoring the expense creation process to your organization's needs. It's advisable to implement them gradually and ensure they align with your financial management practices.

Let's enable the first three settings and return to financial planning. Here we have a request for 500 euros. Let's try to create an expense for 600 euros, for example. We can see that we get an error message - the amount is greater than approved in the request. This is precisely the setting we enabled - "Disallow entering expenses greater than the approved request amount." So, if I create an expense for 500 euros, this expense will be created. Moving on to the next setting, "Allow entering expenses for multiple requests at once." This setting allows you to create expenses for multiple requests simultaneously. You can select requests and specify amounts for each. For example, for the "Office Rent" request, I can allocate 25,000 rubles, and for the "Corporate Chat Payment" request, I can allocate 10,000 rubles. The total transaction amount will be 35,000 rubles, but the distribution will be as specified in the approved requests. Now, let's look at the third setting, "Disallow creating expense transactions without requests." As you can see, the "Request" field now has an asterisk, indicating that it's a mandatory field. Let's try to create an expense without selecting a request. The system informs us that the request is a required field, and we cannot create an expense without choosing a request.

Summing It Up

[Summing It Up](https://www.youtube.com/watch?v=BmqF2xw-q64&t=781.0s)

Let's recap how these settings work:

1. Disallow creating expense transactions without requests: We checked this setting, and it makes the "Request" field mandatory when creating expenses, ensuring that every expense is linked to an approved request.

2. Allow entering expenses for multiple requests at once: We created a transaction linked to two requests, demonstrating the flexibility of linking a single expense to multiple requests.

3. Disallow entering expenses greater than the approved request amount: We attempted to create an expense greater than the approved request amount, and the system prevented it as expected.

4. Don't restrict the expense type within the approved request: This setting allows employees to choose any expense type when creating expenses for requests, even if the type differs from the request's category. It's a specialized setting for specific use cases.

These settings offer control and flexibility in your expense management process. Remember to implement them gradually and consider how they align with your organization's financial practices and policies.

### What to Do If You Make a Mistake

[What to Do If You Make a Mistake](https://www.youtube.com/watch?v=BmqF2xw-q64&t=855.0s)

In this section, you'll learn what to do if you've already created an expense for a request but made a mistake, such as entering the wrong amount. To correct this, you can easily find the relevant expense transaction and edit it. Once you make the necessary corrections and save them, the paid amount for the request will also be updated to the correct value.

# Quality Control

## 8.1 Quality Control: Setup and Operation

### What Quality Control Involves

[What Quality Control Involves](https://www.youtube.com/watch?v=KFB-0WI\_22Q&t=0.0s)

In this video, you'll learn about the quality control tool. With this tool, you can automate the quality control process in your company. Typically, this process involves comparing the actual work performed to the expected results based on a checklist. This tool allows you to manage such checklists and easily monitor their execution.

### What's on the Quality Control Tab

[What's on the Quality Control Tab](https://www.youtube.com/watch?v=KFB-0WI\_22Q&t=30.0s)

In the Quality Control tab, you'll find all the checklists created within your project. You can see general information about them, including the total number of checks performed over time and the date of the last check. You can also edit or delete specific checklists.

### What a Checklist Looks Like

[What a Checklist Looks Like](https://www.youtube.com/watch?v=KFB-0WI\_22Q&t=52.0s)

A checklist typically looks like this, with various items you want to check for. For example, you might have violations like overdue tasks, incorrect statuses, missing calls, and so on. The video demonstrates how this works with several CRM systems. Later, you'll learn how to create checklists, work with them, and configure the tool to suit your needs, regardless of whether your system has any integration with OrgStack.

### Checklists and CRM Systems

[Checklists and CRM Systems](https://www.youtube.com/watch?v=KFB-0WI\_22Q&t=104.0s)

In this video, the presenter demonstrates how to use checklists within a CRM system. Specifically, they open a CRM system called Bitrix24 and navigate to a deal. As a quality control employee, they click on a pre-saved bookmark, which opens a panel displaying a checklist of violations they need to identify. The video also explains the role of descriptions provided by employees with editing access to checklist control. These descriptions help quality control employees understand and address issues during their checks. The video showcases the process of checking for violations, such as overdue tasks and missing calls, within a CRM system. The presenter selects the responsible user for the deal and proceeds with the check. After identifying violations, they can add general comments if needed and conclude the check. The tool demonstrated in this video is flexible and can be used with various CRM systems, allowing quality control checks to be performed seamlessly across different platforms.

### Bonuses and Penalties

[Bonuses and Penalties](ttps://www.youtube.com/watch?v=KFB-0WI\_22Q&t=347.0s)

I will draw your attention to parameters such as bonuses and penalties. These parameters imply the following quality control system. In order for a discovered violation not to remain just a dry fact and for the employee to react to this violation in some way, it is proposed to penalize the employee and, correspondingly, award a bonus to the quality control employee who found this violation. The presence of these fields does not obligate you, of course, to implement any penalty system; it is merely one of the possible ways to handle quality control. I would like to add that in the future, we will introduce an arbitration system, which means that an employee will be able to appeal the violations they have found and provide some examples and evidence that they acted correctly. In such cases, if the appeal is successful, the penalty amount will be doubled and transferred to the auditor, the person who conducted the audit and unfairly or incorrectly marked the violation. Conversely, if an employee decides to appeal the violations they found but it turns out that even more violations were discovered, or it becomes clear that the initially found violations were unfounded, then the employee will be penalized double the amount. So, I will conclude the review here and close the panel.

### How checks appear on other tabs

[How checks appear on other tabs](https://www.youtube.com/watch?v=KFB-0WI\_22Q&t=453.0s)

If I navigate to the general page with quality control lists, I can see that checks have been logged over time. If I go to the report section, I need to select the quality control checklist I want to view, for example, I'll choose this one. I also need to pick the date when the quality control was conducted. Here, I can select the manager I want, a specific auditor, and specific deviations, which are essentially issues that were found, and then I can see the results. For instance, if there were missing calls, as we selected in a specific check, we can see that only one check has been identified with missing calls.

Furthermore, I can expand the issues for each check. If I'm curious about what those two issues were, I can expand them to see the specific violations. I also have a filter to show checks with problems only, as there might be checks where no issues were identified. This filter will display only problematic checks.

In this report, I see a summary of each conducted check. I can view specific violations, search for violations by a specific manager, or see how a particular auditor is performing. In the future, we will definitely add reports grouped by manager and auditor, allowing you to see summarized information about an employee, such as how often they commit violations, the total number of violations over a period, and more.

### Creating and Customizing Checklists

[Creating and Customizing Checklists](https://www.youtube.com/watch?v=KFB-0WI\_22Q&t=578.0s)

In this part of the video, the presenter explains how to create and customize checklists for quality control. Here are the key steps:

1. Creating a Checklist:

• Provide a name for the checklist, e.g., "Quality Control for Sales Deals."

• Specify a link. The link should point to a specific page in your CRM system where you'll be using the checklist. Use curly braces to indicate where the system should find and insert the ID of the specific deal or entity you want to check.

• Choose auditors who will perform the checks. You can select specific roles or departments to ensure that only relevant employees see and use the checklist.

2. Selecting Whom to Audit:

• Add users who will be audited. If you don't add anyone, all positions will participate in the audit. By adding users, you can limit the checklist to specific employees. You can organize users into blocks on the organizational chart to simplify selection.

3. Defining Violations:

• Create violations for the checklist. Each violation should have a name (e.g., "Test"), and you can specify a penalty associated with it. If you don't want to use the penalty system, you can leave these fields empty, and the values will default to zero.

• You can add multiple violations to the checklist by clicking the plus icon and remove them using the trash icon.

4. Saving the Checklist:

• Once you've configured the checklist settings, click "Save" to create the checklist.

These checklists can be customized for specific roles, departments, or areas within your organization. They serve as a structured way to conduct quality control checks and can include bonuses and penalties to incentivize or correct behavior.

### Selecting Whom to Audit

[Selecting Whom to Audit](https://www.youtube.com/watch?v=KFB-0WI\_22Q&t=712.0s)

Next, I need to add the users I want to audit. If I don't add anyone, all positions will be included in the audit. So, in the dropdown list of managers available in my panel, I will see all company employees. That's in this dropdown list. To ensure that only the necessary employees appear in this list, I can add a specific block on the organizational chart. For example, I'll add a sales section. Then, I create violations. I won't come up with actual names right now. Let's say I'll call it a test, specify a penalty. Again, if I don't want to work with the penalty and bonus system, I can simply leave these parameters blank, and then the values will always be zero. Using the plus icon, I can add new entries to the list. Using the trash can icon, I can delete them. And, by clicking the save button, I save the new checklist.

### Customizing Quality Control Settings

In the video the presenter goes into further detail about customizing quality control settings within the Platrum platform. The video covers the following topics:

1. Setting Up the Check Panel Page:

• When users first access the unconfigured quality control tool, they will receive guidance on creating their first checklist and configuring the tool in their browser.

2. Page for Configuring Check Panels:

• This page allows users to configure their check panel settings. It is accessible to all project members who will be conducting quality control checks.

• Users can set up their panels without needing a separate instruction manual, as the platform provides built-in guidance.

These videos provide a comprehensive overview of how to create and configure checklists for quality control within the Platrum platform, allowing organizations to implement structured quality control processes with bonuses and penalties where needed.

### Integration with Chrome Extension

[Integration with Chrome Extension](https://www.youtube.com/watch?v=pVC-GojdDwo&t=41.0s)

In this video, the presenter discusses the official Chrome browser extension for the Platrum quality control tool. Working with the tool is most convenient through this extension, but an alternative method using browser bookmarks is also mentioned. The video will focus on using the Chrome extension for integration.

Here are the steps to integrate with the Chrome extension:

1. Install the Chrome Extension:

• Go to the Chrome Web Store using the provided link.

• You will see the official extension for quality control. If it's not already installed, you will see an "Add to Chrome" button. Click it to install the extension.

2. Checking for Errors:

• If you encounter any difficulties while using the tool and see errors in the check panel, make sure to check the last point mentioned in the provided instructions.

• Some browser settings can block the functionality of the quality control tool, and you may need to disable these settings. The instructions will guide you on where to find these settings, especially for Chrome.

3. Using the Extension:

• Once the extension is installed, you'll see its icon in the upper right corner of your Chrome browser.

• To start working with the extension, simply click on the icon.

4. Setting the Project Host:

• When you open the extension for the first time, it will prompt you to specify the host of your project in the widget settings.

• Enter the host of your project, which is the part of the project's address before ".platform.ru." For example, copy and paste this part into the host field and save it.

• After configuring this, you can close the tab and return to the previous one.

5. Creating the First Checklist:

• The extension will display a message indicating that there is no quality control for the current URL because you haven't created any checklists yet.

• Now you can proceed to create your first checklist within the Platrum platform.

This integration allows you to access and use the quality control tool conveniently through the Chrome browser extension.

### How to Create and Configure a Checklist

[How to Create and Configure a Checklist](https://www.youtube.com/watch?v=pVC-GojdDwo&t=176.0s)

In this video, the presenter explains the process of creating and configuring a checklist for quality control. Here's a summary of the steps involved:

1. Create a Checklist:

• Begin by specifying the name of the checklist. This name should reflect the purpose of the checklist. For example, it could be "Lead Handling Quality Control."

• Next, provide a link to the page that will be checked. This is the URL of the specific page within your CRM or service system where you will conduct quality control. You can return to this field later to learn more about it.

2. Select Auditors:

• Auditors are the individuals responsible for conducting quality control checks using this checklist. You can add job positions to this field. For example, you might select "Head of Sales Department" as an auditor for lead handling quality control.

• To include all subordinates of a selected position as auditors, click the icon that represents including all subordinates. This ensures that the checklist is available to everyone in that job position.

3. Limit User Selection:

• This field is not mandatory but recommended. It allows you to limit the users who can be selected for quality control using this checklist. For example, if you're conducting lead handling quality control, you may want to limit the selection to "Warm Sales Managers." This means that when auditors open the checklist, they will only see users from the specified job positions in the user selection field.

4. Configure Violations:

• Here, you define the specific violations or quality control criteria for the checklist. Each violation should be described clearly. For instance, you could have violations like "Did not greet the customer according to the protocol" or "Did not offer a special offer."

• You can add, edit, and delete violations using the plus and trash icons.

• You can also set the sorting order for violations using the sort value. Lower values will place violations higher in the list when saved.

This checklist creation and configuration process ensures that the right auditors have access to the checklist and that the violations are clearly defined for quality control purposes.

### Link to the Page Being Checked

[Link to the Page Being Checked](https://www.youtube.com/watch?v=pVC-GojdDwo&t=396.0s)

In this section, the presenter discusses the technical aspects of configuring a checklist, focusing on the "Link to the Page Being Checked." This aspect of checklist configuration is crucial for quality control, and here's how it works: The tool for quality control allows you to monitor the work of your employees in various web systems used in your business operations, such as CRM systems, HRM systems, spreadsheets, and more. The key is that if a web service has a specific address on the internet, you can use this tool to automate the monitoring of your employees' work within that system. For example, if you are creating a checklist for lead handling quality control, you will likely be working with a CRM system to manage leads, deals, or orders. Regardless of what these entities are called in different CRM systems, they all have a unique identifier associated with them in the URL of the web page. This unique identifier distinguishes one entity from another. The URL structure may vary between different CRM systems, but the key is to identify where the identifier appears in the URL and use curly braces to enclose the word "ID" (which stands for Identifier) at that location. For example, if your CRM system's URL for a deal looks like this: https://crm.example.com/deal/4, where "4" is the identifier for a specific deal, you would enter the URL as https://crm.example.com/deal/{ID} in the checklist configuration. By setting up the URL in this way, the tool will automatically recognize the identifier for each specific page you visit, and it will match it with the corresponding checklist. This means that when you open a specific deal in your CRM system, the tool will automatically load the relevant checklist for that deal. This configuration allows you to check all deals or entities in your CRM system seamlessly. If you change the URL structure or the host of your CRM system, you can simply update the host in the checklist configuration to ensure the tool continues to work correctly. In summary, configuring the link to the page being checked is essential for seamless integration with various web systems and automating the monitoring of your employees' work.

### Checklist for Working with AMOcrm

[Checklist for Working with AMOcrm](https://www.youtube.com/watch?v=pVC-GojdDwo&t=638.0s)

Let's continue exploring the configuration of checklists using a different CRM system as an example. This time, we'll work with AMOcrm. Here's how to configure it:

1. Open the card of a deal or entity in AMOcrm.

2. Copy the URL of the specific deal's page. It should have a structure similar to the previous CRM system, with a unique identifier in the URL.

3. Go to the checklist configuration and paste this URL.

4. In the checklist configuration, where the URL contains the identifier, use curly braces to enclose the word "ID." This should look like {ID}.

5. Save the checklist configuration.

Now, when you open the checklist panel on the page of a specific deal in AMOcrm, the tool will recognize the identifier in the URL and automatically load the relevant checklist for that deal.

You can use this checklist to perform quality control checks and evaluations specific to each deal within your AMOcrm system. Repeat this process for different deals or entities as needed.

This configuration ensures that your quality control process seamlessly integrates with AMOcrm, allowing you to monitor and evaluate the work of your employees efficiently.

### Checklist for Working with "Plans" in Platrum

[Checklist for Working with "Plans" in Platrum](https://www.youtube.com/watch?v=pVC-GojdDwo&t=677.0s)

Let's consider another scenario for creating a checklist, specifically for working with weekly planning in Platrum for your employees. If we examine the URL structure in this case, it may appear more complex than the previous examples. Here, the identifier is found in the so-called GET parameters of the link, which are everything in your URL after the question mark. Let's copy this link together.

1. Copy the URL of the page where you want to perform quality checks. In this example, the identifier is present in a GET parameter called "User."

2. In the checklist configuration, replace the identifier in the URL with a combination of characters or symbols enclosed in curly braces, like {ID}.

3. In the URL, there may be additional parameters after the identifier. If these parameters change, it can lead to issues where the tool doesn't recognize the checklist for that URL.

4. To avoid this issue, replace all the parameters you don't need with an asterisk (\*) in the checklist configuration. For example, if the date is not relevant for your quality checks, replace the date parameter with an asterisk.

By configuring the checklist in this way, you ensure that the tool focuses only on the important parts of the URL, such as the identifier, while ignoring the less relevant parameters. This allows you to conduct quality checks seamlessly, regardless of changes in other parts of the URL.

This approach makes it easier to monitor and evaluate plans in Platrum for different users without being affected by changes in the URL's parameters.

### Handling URLs with No Identifier

[Handling URLs with No Identifier](https://www.youtube.com/watch?v=pVC-GojdDwo&t=925.0s)

In some cases, you may need to configure the checklist for systems where there is no clear identifier in the URL or where the URL structure is complex. Let's explore scenarios where an identifier is not present:

1. Tasks List without Direct Task Pages: Suppose you want to conduct quality checks in a system where there are no separate pages for individual tasks, and tasks are displayed in a list format. In this case, each task in the list may have a unique identifier, such as a sequential number. Configure the checklist as follows:

• Set the URL to the general tasks list.

• Leave the ID field empty in the checklist configuration.

• During the check, manually specify the task identifier you want to review, such as the sequential number of the task you are inspecting.

This approach allows you to perform quality checks even in systems where tasks or records are displayed in a list, and there are no distinct individual task pages.

2. Google Sheets: Google Sheets URLs may contain an identifier in the middle of the URL, surrounded by other characters. In this case, configure the checklist as follows:

• Set the URL to the general Google Sheets page.

• Place the identifier (the part of the URL that represents the specific sheet) in the ID field.

• Use an asterisk (\*) for all characters that appear after the identifier in the URL.

This configuration allows you to perform quality checks for specific Google Sheets, even if the URL structure includes additional characters beyond the identifier.

By configuring the checklist this way, you ensure that the tool can recognize and focus on the essential parts of the URL while ignoring less relevant parameters or characters. This flexibility allows you to conduct quality checks effectively in various scenarios, even when there is no direct identifier in the URL.

### Let's Review Everything

[Let's Review Everything](https://www.youtube.com/watch?v=pVC-GojdDwo&t=1034.0s)

In the checklist for managing the "Platrum" system, we've learned how to handle various URL structures, including cases where identifiers are present in the URL and when there are no direct identifiers. Here's a summary of what we've covered:

1. Identifiers in URLs:

• When you want to check specific pages with unique identifiers in the URL, such as deals, calls, tasks, etc., you can use the {ID} placeholder in the URL field.

• The system automatically recognizes and substitutes the identifier from the URL when opening the checklist.

• You can use this approach to automate quality checks for various entities in your web system.

2. Complex URL Structures:

• In cases where the URL structure is more complex, and there are additional parameters, you can configure the checklist to focus on the essential part using the {ID} placeholder and an asterisk (\*) to ignore other characters in the URL.

• This ensures that the checklist works correctly even when URL parameters change.

3. No Identifiers in URLs:

• When there are no direct identifiers in the URL, such as in systems with lists of items (e.g., tasks, records), you can configure the checklist with the general URL of the list.

• Leave the ID field empty and manually specify the identifier during the check, such as the sequential number or unique identifier of the item you are inspecting.

• This allows you to perform quality checks in systems where individual pages for items are not available.

4. Google Sheets:

• Google Sheets URLs may have identifiers in the middle of the URL, surrounded by other characters.

• Configure the checklist with the general Google Sheets URL, place the identifier in the ID field, and use an asterisk (\*) for characters following the identifier.

• This ensures that quality checks can be performed for specific Google Sheets.

By understanding these concepts and configuring the checklist accordingly, you can effectively conduct quality checks in various scenarios, whether identifiers are present in the URL or not. This flexibility allows you to automate quality control in different web systems.

# 9. Warehouse

## 9.1 Warehouse: Working with the Tool

[Warehouse: Working with the Tool](https://www.youtube.com/watch?v=kDRO6AYYi-A)

### What Warehouse is Suitable for and Where to Start

[What Warehouse is Suitable for and Where to Start](https://www.youtube.com/watch?v=kDRO6AYYi-A&t=0.0s)

In this video, we will talk about the warehouse tool. With this tool, you can keep track of your company's assets and always know who among your employees has a particular asset, its remaining value, what expenses are planned for purchasing new equipment, and more. In the initial version, this tool is less suitable for automating inventory management, for example, in a retail warehouse. In the future, we will expand its functionality for various purposes, including this one. However, right now, you can disable the linking of goods to employees and use this tool to track items on a physical warehouse. To familiarize yourself with all the warehouse's capabilities, let's go through each of them step by step.

To get started, you'll need to create product categories and warehouses. As you can see, product categories can have different levels of nesting. To create a warehouse, you simply need to specify its name. In this project, I already have categories and warehouses created, so we can move on to products.

### Adding a Product

[Adding a Product](https://www.youtube.com/watch?v=kDRO6AYYi-A&t=67.0s)

On the product page, you have the option to create products manually or import them. Let's start by creating a product manually:

1. Product Details:

• Begin by providing the product's details. This includes its name and description.

• You can specify the product's lifespan, which is essential for calculating depreciation. For example, if it's an office chair with a lifespan of 3 years or 36 months, you should enter this information. If no lifespan is specified, the entire product cost will be considered as depreciated upon arrival. This is applicable to consumables or items that are replenished frequently and don't require depreciation calculations.

2. Inventory Number:

• You can assign an inventory number to the product. In the first version of this tool, it's primarily designed for tracking company assets, where precise identification of each item is necessary.

• This field can be left empty, especially for consumable items. However, if you want to perform detailed asset tracking, you can enter a unique inventory number. For example, when receiving the product, you immediately associate it with a particular chair.

3. Category and Employee Assignment:

• Choose the product's category from the available options.

• Optionally, you can assign the product to a specific employee. This field can be enabled or disabled in settings. If enabled, it ensures accountability for company assets. You will always know which employee is responsible for a specific piece of equipment, and each employee can view the list of items assigned to them.

• If the employee assignment field is enabled and left empty, the responsibility defaults to the employee specified as the default responsible person in settings. This ensures that every company asset has someone accountable for it.

By following these steps, you can manually create a product and find it listed among your products. This tool is designed for tracking company assets and can help you keep detailed records of your inventory, including who is responsible for each item and its depreciation status.

### Creating an Entry

[Creating an Entry](https://www.youtube.com/watch?v=kDRO6AYYi-A&t=197.0s)

To create an entry for a product, follow these steps:

1. Select the Product:

• Go to the list of products and select the one you want to create an entry for.

2. Create an Entry Document:

• From the list of products, you can create various types of documents. In this case, let's create an entry document.

• A panel for creating the entry will open, and the selected product will already be chosen.

3. Specify Details:

• Enter the quantity of the product received.

• Choose the warehouse where the product is being stored.

• Input the purchase amount and the residual value.

Note: The residual value represents the estimated market value of the product at the time of entry. It accounts for the fact that new products typically lose value once sold. This value is essential for calculating depreciation, which will be based on this amount.

4. Mark as Completed:

• You can mark the entry as completed if the transaction is final. This signifies that the document is no longer a draft and has been confirmed.

5. Save the Entry:

• After filling in the required information, save the entry document.

### Creating a Draft

[Creating a Draft](https://www.youtube.com/watch?v=kDRO6AYYi-A&t=244.0s)

You can also save the document as a draft without marking it as completed. This draft allows you to make further edits before confirming the transaction. Once you're ready, you can mark it as completed, and it will then become a full-fledged entry in the system.

### The Importance of Specifying Costs

[The Importance of Specifying Costs](https://www.youtube.com/watch?v=kDRO6AYYi-A&t=261.0s)

Specifying costs, including the purchase amount and residual value, is crucial for accurate asset management. These values are used in calculating depreciation and determining the current value of assets. By having this information in the system, you can track the financial status of your inventory and assess the value of your assets accurately. After creating entries and specifying costs, you can manage your inventory effectively and calculate depreciation when necessary.

### Depreciation Analysis

[Depreciation Analysis](ttps://www.youtube.com/watch?v=kDRO6AYYi-A&t=289.0s)

The depreciation analysis in the system is designed for managerial accounting purposes rather than accounting standards. Its primary goal is to show the monthly financial impact of asset wear and tear within the company.

### Transaction Types in the System

[Transaction Types in the System](https://www.youtube.com/watch?v=kDRO6AYYi-A&t=343.0s)

There are three main transaction types in the system:

1. Initial Depletion Transactions: These transactions are created based on the difference between the purchase price (specified during entry) and the initial residual value (also specified during entry). For example, if an item was purchased for 14,000 rubles and had an initial residual value of 7,000 rubles during entry, an initial depletion transaction of 7,000 rubles would be created.

2. Depreciation Transactions: Depreciation transactions are generated periodically, typically once a month, for each item that has a specified lifespan and remaining residual value. These transactions account for the gradual decrease in the asset's value due to wear and tear.

3. Write-off Transactions: If an item, like the chair in your example, is broken or removed from inventory for any reason, a write-off transaction is created. This transaction reflects the total remaining residual value of the item at the time of write-off.

### Analyzing Depreciation Transactions

[Analyzing Depreciation Transactions](https://www.youtube.com/watch?v=kDRO6AYYi-A&t=493.0s)

1. Load Transactions: You can load transactions for a specific period, such as December. During the load, you can choose how to group the data: no grouping, grouping by categories, or grouping by months.

2. No Grouping: Without grouping, you see a list of all transactions of all types for all products during the selected period. This provides a comprehensive view of transactions.

3. Grouping by Categories: Grouping by categories shows the total depreciation for each category of products during the selected period. For example, it would show how much was depreciated for "Office Furniture and Equipment" and "Household Appliances."

4. Grouping by Months: This option aggregates the data by months, showing the total depreciation and remaining residual value for each month. It gives an overview of how assets depreciate over time.

Analyzing these depreciation transactions provides insights into how much the business loses each month due to asset depreciation.

You can also apply various filters to focus on specific categories, find products by name or inventory number, and use other filters to refine your analysis. In summary, the depreciation analysis tool helps you manage and assess the financial impact of asset depreciation within your company.

### Depreciation Transactions

[Depreciation Transactions](https://www.youtube.com/watch?v=kDRO6AYYi-A&t=493.0s)

Let's review how depreciation transactions are calculated. Once again, select the "No Grouping" filter and choose December as the month. Let's take any transaction as an example; for instance, let's look at the TV. We can see that it has a depreciation amount of 638 rubles. This amount is calculated by dividing the remaining residual value at the time of the TV's receipt into inventory by its expected lifespan. Essentially, we spread the remaining value of the item evenly over its expected lifespan, writing off an equal portion each month until its value reaches zero. This suggests that the item might need replacement soon.

### Identifying Items That Need Replacement Soon

[Identifying Items That Need Replacement Soon](https://www.youtube.com/watch?v=kDRO6AYYi-A&t=545.0s)

Within the list of items, you can use filters to find equipment or items that may require replacement soon. For example, you can set a filter for items with a remaining useful life of 1 to 3 months. In this case, there are no items that fit this criterion. However, if you had such items, it would be an indicator that you should consider ordering replacements.

### Data Import

[Data Import](https://www.youtube.com/watch?v=kDRO6AYYi-A&t=577.0s)

Now, let's delve into data import. If you already have an existing database of items that you manage in an external system or an electronic spreadsheet, you can import these items into your inventory using the import mechanism. To do this, navigate to the import page. Here, you can download a sample CSV file. You can save any spreadsheet as a CSV file; there's no need for special software. In the import file, you'll need to specify the necessary parameters, similar to the provided example. If you include stock quantities in your import file, the system will automatically generate all the necessary incoming transactions. This means that you'll see a list of receipts grouped by the dates and allocated to the respective warehouses. Additionally, if you specify the starting residual value and purchase price, the system will generate all the depreciation transactions for the entire specified period. You can set the item's acquisition date within the import file as well. If an item has been in your possession for several years, you can specify its actual acquisition date, and the import will create receipts and depreciation transactions accordingly. This way, you can efficiently populate your inventory with the necessary data and associate items with responsible individuals. In summary, data import simplifies the process of setting up your inventory management, allowing you to quickly import all relevant information and start using the system effectively.

### Mass Editing of Items

[Mass Editing of Items](https://www.youtube.com/watch?v=kDRO6AYYi-A&t=678.0s)

You can also work with your list of items by making mass changes. For instance, you can select all items in the "Home Appliances" category, click on "Mass Edit," and change the responsible person or update their category. This feature is convenient when you need to modify multiple items simultaneously. For example, you can find all the items belonging to a specific employee and then transfer all these items to another employee.

### Creating Write-Offs

[Creating Write-Offs](https://www.youtube.com/watch?v=kDRO6AYYi-A&t=708.0s)

Working with other documents is similar to working with receipts. When creating a write-off, you specify the item you intend to write off. For instance, let's say I have a chair. I can see that I don't have this chair in my main warehouse or the second warehouse, but it's available in the "Office Kitchen" warehouse. I can then proceed to write off this chair. The document will display the remaining amount that I am writing off. Like receipts, any document, such as write-offs, has a status for validation and includes similar fields. You can also add comments or additional information. The same principles apply to item transfers; you specify the source and destination warehouses when moving items. For inventories, it involves marking the actual inventory status.

### Inventory

[Inventory](https://www.youtube.com/watch?v=kDRO6AYYi-A&t=756.0s)

How does an inventory process work? Suppose I conduct an inventory check and need to record that chair with inventory number 3010, which in my case is the "Markus" chair, is missing. I can see that my "Office Kitchen" warehouse has an expected balance of one chair. However, during the physical inventory check, I couldn't find this chair. I record that the actual balance is 0 and save the document. If I now go to the write-off section and view write-offs for today, I will see that a write-off was created based on the inventory check. In the related documents, you will see the inventory document that generated the corrective write-offs. In this case, the amount is listed as 0 because the item had an expected balance of 0. If the inventory results were the opposite, meaning I found two of these chairs instead of one, the inventory check would generate a corrective receipt associated with that inventory check.

# Passwords and Access

## 10.1 Passwords: Tool Overview and Getting Started

[Passwords: Tool Overview and Getting Started](https://www.youtube.com/watch?v=EHVMUtO5Kpw)

### Why You Need Passwords

[Why You Need Passwords](https://www.youtube.com/watch?v=EHVMUtO5Kpw&t=0.0s)

In this video, we will explore the password management tool in Platrum. With this tool, you can centrally store and administer your personal and work passwords for various services and systems you use. All passwords will be stored in encrypted form, and no one but you, including Platform employees, will have access to them. You can find more detailed information about security in the corresponding section of the documentation. You will see a link to it in the tooltip when you first enter this tool. The tooltip will be displayed until you create your first category here. You can also find this article in our help widget or directly in our documentation at help.platrum.ru.

### Tool Overview

[Tool Overview](https://www.youtube.com/watch?v=EHVMUtO5Kpw&t=41.0s)

First, let me briefly explain how this tool works. Here, you can save your passwords for various services used in your work. It often happens that these passwords need to be accessed not only by you but also by some employees in your company. And this password, in one way or another, needs to be passed on to an employee. If this is not done centrally in a single system that always tells you who has access to which password at the moment, who should retrieve certain passwords, and so on, problems will inevitably arise. You will never know which of the passwords is currently accessible to which of your employees, whether they are current or former. Our tool is designed precisely for safeguarding and simultaneously controlling access to the necessary passwords by the respective employees. You can also store personal passwords here, but let's discuss that a bit later.

### What is a Master Password

[What is a Master Password](https://www.youtube.com/watch?v=EHVMUtO5Kpw&t=90.0s)

So, in order for us to start using the tool, we need to create the first category. Essentially, a category is a folder where passwords are stored, grouped by some criteria. For example, the category name could be "Payment Systems." Clearly, here we will store passwords for various payment systems used in our business. When creating a category, you need to create a master password. This master password is used to encrypt your passwords, which you will securely store before sending them to Platrum servers. This is done so that none of your passwords are "sent" or "stored" on our servers in an unencrypted form. In other words, before a request is sent from your browser to our servers to save your password, your password will be encrypted using the master password of the corresponding category. Therefore, if some hypothetical wrongdoer gains access, for example, to Platrum servers, they will have a completely useless set of characters, not your actual password. So, once again, the master password is primarily intended to encrypt your passwords so that they are stored on our servers in an encrypted form.

There are no specific requirements for the complexity of this master password because, knowing the master password but not having access to the category itself or the passwords in that category, none of your employees or wrongdoers can access your passwords. It cannot be reset, so if you forget it, you will lose access to the entire category and all the passwords within it. You can delete the category, but there is no way to decrypt the passwords back. Naturally, the inability to recover the master password is necessary to maintain the corresponding level of security. If the master password could be reset or recovered in some way, a wrongdoer could also exploit this mechanism. So, when creating a category, be sure to securely record the master password somewhere. As already mentioned, the master password itself does not pose any danger to you because without direct access to the encrypted password stored on the Platrum server, the master password is useless. However, if you write down the master password for the category, you won't forget it and won't lose access to the passwords in that category. Well, let's create a master password "Test" for example.

### Creating Passwords in a Category

[Creating Passwords in a Category](https://www.youtube.com/watch?v=EHVMUtO5Kpw&t=224.0s)

We have created the first category, "Payment Systems." Let's try to create a password here. When I just created the category and am creating a password in it for the first time, I am asked for the master password again. This is done, firstly, for security reasons. If you accidentally entered a master password with a typo during category creation and didn't notice it, you will quickly realize it here if you enter an incorrect password, and you can recreate the category immediately. So, let's enter the correct master password. After entering the master password, it is also stored in an encrypted form in your browser. As long as you are on the password management page, you can work with this category, and the master password will not be requested again. But as soon as you leave this page or refresh it, you will need to enter the master password again to work with the category. This is done for added security. For example, if you enter the master password, then go to another section and leave your computer unlocked. So, what do we need to save the password?

In the Name field, we enter the password's name. For example, it could be "Yandex.Cash." In the URL field, we enter the link to the personal account or login page. I'll just put test.com here. Next, you specify the login for accessing this personal account and enter the actual password. Let's say, in this case, the password is 123456. You can also provide a description. This is just a hint that will help you understand and organize your passwords. For example, if you have multiple passwords for Yandex.Cash, the description can be something like "Old account." So, let's save the password. We have successfully created a password. The hint we entered is displayed below the name for convenience.

### How to Use the Tool

[How to Use the Tool](https://www.youtube.com/watch?v=EHVMUtO5Kpw&t=348.0s)

I refreshed the page, and the system is asking for the master password again. If I enter it incorrectly, nothing will be copied, of course. Also, until I enter the master password, I cannot add a password to this category, view who has access to the password, or edit the password itself. Well, naturally, if I have access to this category, I can simply see which passwords are stored here, but nothing more. So, let's try copying our password. I enter the master password, and I can see that our password has been successfully copied. This is how I save passwords from all the payment systems we use in this category.

## 10.2 Passwords: Managing Access

### Initially, passwords are only visible to you

[Initially, passwords are only visible to you](https://www.youtube.com/watch?v=60KUgdiURm8&t=0.0s)

In this video, we will explore how access works in the password management tool in Platrum. So, I've already created the first category, and the first password has been added to it. Right now, as we can see, this password is only accessible to me. The next task will be to grant access to this password to a specific employee. By default, if any employee goes to the "Passwords" tab in Platrum, they will only see their personal passwords and the ones available to me. Naturally, unless I configure additional access, nobody will see the payment system category.

### How to grant access to a category

[How to grant access to a category](https://www.youtube.com/watch?v=60KUgdiURm8&t=29.0s)

Let's now take a look at the category access settings together. In this submenu, we have several options: "Edit," "Change master passwords," "Import," and "Delete." Let's start with editing. Here, we can change the name and grant access to the category. Access to the category is the same as ACCESS TO ALL PASSWORDS WITHIN IT. For example, I want to grant access to all payment systems to a specific employee. I add the employee here, and I can choose the access level, which can be either "View" or "Edit." Additionally, I can give this employee the ability to edit access rights. How will this work? For instance, I add the Chief Accountant here since we're talking about payment systems, and then I give them the ability to grant access to some of these passwords to their subordinates. So, now I'm giving Eugene Lensky access for viewing and also stating that this employee can edit access rights. What does this mean for the user? First, they will be able to view the passwords in this category. Second, they will be able to grant access, but the level of access they can grant is limited to their own access level. In other words, in this case, this employee can only grant "View" access to their subordinates. Thus, the Chief Accountant won't be able to suddenly grant access to some sales manager to a payment system without prior authorization. How do we save this? We've added an employee who has access to the category, and now we can see that the password by default displays information indicating that it is accessible to two active users. We can see that one employee has access through the category, and the other employee, the user under which I'm currently logged in, is the administrator.

### Who has access to all passwords

[Who has access to all passwords](https://www.youtube.com/watch?v=60KUgdiURm8&t=130.0s)

So, if other users in your project have administrator access, which is referred to as "Password Administration" in the access settings, it grants full access to all password categories and all passwords in your project. If a user has such access, they will always be listed here, and as we can see, it is displayed here purely for informational purposes, so I cannot change it. When I hover my cursor over the corresponding access, I see a tooltip indicating that in this case, Ivan Petrov is an administrator, and Eugene Lensky has access to the password because the category is available to him. Accordingly, we can see the access level for each employee.

### How to grant access to an individual password

[How to grant access to an individual password](https://www.youtube.com/watch?v=60KUgdiURm8&t=167.0s)

We can also grant access to a specific password. Currently, I'm editing access to a specific password, "yandex.cassa" in this case. So, I can grant access to a specific user here. Let's grant access, for example, for editing. Save. Now we can see that this password is accessible to three users. If I add another password here, it will only be accessible to two users who inherit access from the employee to whom the category is available. Therefore, you can grant access to an entire category at once if an employee inherently needs all passwords in that category, or to a specific password. For example, employee Oleg Kuznetsov, to whom we granted access to a specific password, will see the "Payment System" category in the menu, but there, he will only see one password - "Yandex.Checkout". Passwords like PayPal and all the others I add here, if I don't add this user to those passwords, he won't see them.

### Removing access: What happens

[Removing access: What happens](https://www.youtube.com/watch?v=60KUgdiURm8&t=227.0s)

Next, I'll show you a very important and convenient point. For example, right now, I'll revoke access from Oleg Kuznetsov to this password. I remove the user, and save. What do we see? We see that for the "Yandex.Checkout" password, it now indicates that this password is accessible to one active user and one removed user. What does this mean? If I once granted access to a password to an employee, theoretically, they could have saved that password somewhere, used it, stored it intentionally in their browser. Even if we take away access from this employee, even if we remove them from the project, and when a user is removed from the project, exactly the same mechanism will be triggered, we will still see that this employee had access to the password. This information will remind you that it's time to change the password. So, once again, anyone who has ever had access to a password, for example, we can now also revoke access at the category level from the user Eugene Lensky. Let's save it. Now we see that Eugene Lensky is listed under removed access for both passwords in this category. To reiterate, if we were to completely delete the user from the project, the same mechanism would apply. We would still see here that this user had access to the password. And now, what do we need to do?

### What changing the password does

[What changing the password does](https://www.youtube.com/watch?v=60KUgdiURm8&t=310.0s)

Obviously, if a password is compromised in any way, we need to change it. Let's change it. And after changing the password, the information about removed users disappears because it is no longer relevant. In other words, yes, employees may have saved the password, but the password they saved no longer works.

### Access Reports for Passwords

[Access Reports for Passwords](https://www.youtube.com/watch?v=60KUgdiURm8&t=329.0s)

Naturally, when you create a large number of categories, and each category contains multiple passwords, it can be challenging to keep track of which passwords are accessible to whom, how many removed accesses you have, and which passwords need updating. To address this issue, we have access reports. This is a report on users, and its main purpose is to show all users who have access to at least one password. It doesn't matter if they currently have access or if these are users who once had access but the password hasn't been changed yet. Here, you can comprehensively see who has access to what passwords. For example, let's open our current user, under which I am currently authorized, and see that this user has access to two passwords: PayPal and Yandex.Checkout. We see the level of access, we see the link to the category with these passwords, and we see information about who granted access. In this case, I am the password administrator, so no one granted access to me; I inherited it automatically. Let's, for example, open the user Eugene Lensky. Here, we see exactly who granted access. We see a tooltip indicating that to permanently revoke access, you need to change the password. Let's do that together. And as we can see, we are asked for the master password again because we switched to another page. Let's enter the master password. Let's make the change. And we can see again that the passwords are now only accessible to one user.

### How to Revoke Access to Your Passwords

[How to Revoke Access to Your Passwords](https://www.youtube.com/watch?v=60KUgdiURm8&t=407.0s)

Let's add another user again to see how you can revoke accesses from the report. If a user currently has active accesses to passwords, first of all, you can revoke all of them at once directly from the report without looking at the details of these passwords. Additionally, by opening the details for that user, you can revoke access to a specific password. Of course, there's a user search function on this page. If you have many users with accesses, you can easily find the one you need. Users here are sorted by the number of passwords they have access to by default. The "available to me" page displays all the passwords that are available to me. This is a convenient page for an administrator, as it will show all the passwords in the system, except for users' personal passwords. A regular user will see all the passwords they need for their work here.

### Summing Up

[Summing Up](https://www.youtube.com/watch?v=60KUgdiURm8&t=459.0s)

So, let's briefly go over the mechanics once again. I created a category, came up with a master password for it, and filled this category with passwords. Next, when I need to grant access to a particular password to a user, I do so either at the category level or at the specific password level. When I grant access, that user will gain access to that particular password. However, without the master password, they still won't be able to copy or view it. Therefore, I need to separately communicate the master password to this user. It's not critical for a user to know your master password because you can always revoke their access to that password. The knowledge of the master password won't give them any advantage because they simply won't have access to the password or the ability to copy it. Consequently, you can make relatively simple master passwords and share them with employees who need access to certain passwords without much concern. The mechanism for controlling who has access to a password is built into Platrum, and you manage it through these interfaces. The master password is only needed to encrypt your passwords before sending them to Platrum's servers.

## 10.3 Passwords: Import, Master Password Reset, Personal Passwords

### How to Change a Password's Category

[How to Change a Password's Category](https://www.youtube.com/watch?v=A5XJcH9EYZs&t=0.0s)

In this video, we will delve into various administrative aspects of the password management tool in Platrum. Let's create another category. Let's call it "Bank Accounts." You can rearrange categories by dragging and dropping them. You can also move a password from one category to another by changing its category value in the corresponding field. Each password, if it's in multiple categories, has a field for its category. Here, I'm selecting, for example, PayPal, which I want to move to the "Bank Accounts" category. I choose the category I want and click "Save." I'm asked for the master password of the new category. I enter it. Naturally, if I enter it incorrectly, the changes won't be made. I can only change categories like this for passwords that I can edit and only for categories that I can edit. In other words, I can't take a password that's simply accessible to me in a category where there's only one password and add some random unrelated password. We save it. There you go, the PayPal password has moved to the "Bank Accounts" category.

### How to Change the Master Password

[How to Change the Master Password](https://www.youtube.com/watch?v=A5XJcH9EYZs&t=64.0s)

Now, let's explore what else we had under the category management submenu. Here, we have the option to change the master password. I believe the purpose is clear. If we want to change the master password for our category, we use this feature. Here, we enter a new password, confirm it, and make the change. Naturally, to make this change, we are asked for the current master password of that category, regardless of whether we just entered it a moment ago or not.

### Password Import

[Password Import](https://www.youtube.com/watch?v=A5XJcH9EYZs&t=96.0s)

We can also import passwords. It's possible that you have a considerable number of passwords already stored, perhaps in an electronic spreadsheet, on paper, or elsewhere. The point is, creating passwords one by one can be quite time-consuming, and you can make use of the import feature. For importing, you need to create a simple file, and an example is provided in the import panel. So, on each separate line, you specify an individual password. Each line contains information separated by commas: Name, URL, Login, Password, Description. If you don't have a description, which is optional, you can simply omit it, as we can see in the example data provided, where the line ends immediately after the password. You can have an unlimited number of such lines. You import them, enter the Master password, and see that the import has been successful. This way, you can import passwords into any of the categories.

### Category Deletion

[Category Deletion](https://www.youtube.com/watch?v=A5XJcH9EYZs&t=160.0s)

Next, we have the option to delete a category. This option is available without requiring the Master password but is only available to those who have access to password administration, meaning only administrators in your project. Why is this needed? There might be a situation where you have forgotten your Master password. Resetting it is impossible for understandable security reasons. If the Master password could be reset or recovered, the security of storing your passwords would be compromised. Someone else could also reset or recover the Master password for your category. Therefore, it's crucial to always keep a record of your Master passwords somewhere safe. I'll repeat, the Master password on its own is entirely secure and does not grant malicious individuals access to your passwords. Therefore, you can safely store the Master password in an electronic spreadsheet or a similar place. The file itself won't pose any harm to you. However, there might still be a situation where you've forgotten the Master password, and to prevent that category from becoming a permanently unused burden, you can delete it. After deletion, you'll see a warning that the category, along with all its passwords, will be deleted, and you'll need to confirm it.

### Personal Passwords

[Personal Passwords](https://www.youtube.com/watch?v=A5XJcH9EYZs&t=230.0s)

Now, let's talk about the "Personal" category. The mechanics of working with personal passwords here are exactly the same, except that personal passwords are only accessible to you. You cannot grant access to these passwords. These are truly personal passwords, and each of your employees can store their own personal passwords here. The project administrator will not have access to them. When you create the first password in this category, you'll be asked for the master password for the "Personal" category. Here, you can create this master password and then work with the category just like we discussed with other categories. In this category, you can store passwords for personal use. You can also change the master password here. Personal passwords do not have the option to delete the entire category; they only have the option to reset the category. In principle, the mechanics are the same. All passwords in this category will be deleted, the master password will be reset, and you can use the category again. This is done so that you can resume working with the "Personal" category if you happen to forget or lose the master password.

### Summing Up

[Summing Up](https://www.youtube.com/watch?v=A5XJcH9EYZs&t=283.0s)

So, let's summarize. In this system, you can safely and systematically store both personal passwords and passwords for various services and systems used in your business. You can securely grant access to these passwords to the necessary employees, always see who has access to which passwords, and always know when it's time to replace a password because it was accessible to too many employees. With this tool, you can forget about the important problem of password storage and administration in your business.

# 11. Business Processes

## 11.1 Business Processes: Demonstration of Operation

### What is the Business Process Module For

[What is the Business Process Module For](https://www.youtube.com/watch?v=v9ob-3hPq-Y&t=0.0s)

Good day! In this video, we will explore what business processes are in Platrum, what tasks can be solved using them, and most importantly, how to configure them. So, the mechanics of business processes in Platrum implies the possibility of solving various business tasks that require a systematic step-by-step approach. This can be any process, whether it's a task in the sales department, an optimization task in hiring, HR, or the administrative and economic department. It doesn't matter. If you can structure your process in some way, break it down into specific steps, identify what needs to be done at each of these steps, and, most importantly, who needs to do what at each of these steps to achieve the result, and outline all possible outcomes in these processes, you can always transfer such a process to Platrum to manage it clearly, systematically, and maintain a complete history while avoiding any errors. So, let's look at several created processes as an example of how this can work and what it's all about. Currently, we are in the business processes section. Here we can see three main pages. Today, we will mainly focus on working with the three pages of business processes and the business process builders. In fact, an ordinary project user only has access to one page, which is called "Business Process," and from here, they can create the processes available to them. The business process builder and the page with business process entities, for configuring business process entities, are only available to the administrator or to someone you designate by granting them the appropriate rights and access.

### How an Employee Starts a Business Process

[How an Employee Starts a Business Process](https://www.youtube.com/watch?v=v9ob-3hPq-Y&t=101.0s)

Let's imagine that we are an ordinary employee who cannot edit anything and see how processes are created. So, I clicked the plus sign to create a new process. Here, I have access to various processes that I can start as an employee. In this case, there are many of them here because I am viewing this project from an administrator's perspective. In practice, an employee might only have one process here or none at all. Let's, for example, look at a process like "Hiring Request." Suppose I am a department head, and I want to hire a new employee, say, a cold sales manager, because I believe we need one more to meet our sales targets. I've selected the relevant process, and I have automatically been assigned as the executor. If necessary, I can assign this process to someone else, but in this case, I'm fine with being the executor. Let's create the process and get into it.

### What You See on the First Step

[What You See on the First Step](https://www.youtube.com/watch?v=v9ob-3hPq-Y&t=163.0s)

What do we see in the process? The main blocks available here. The upper part contains basic information about the process. In large text, we see the name of the current step and the avatar of the person responsible for the current step, the one who should complete this step. Next, we see the name of the business process, meaning, in this case, we understand that it's a business process called "Hiring Request" and the step is "Creating a Request" in the business process. Here, we can also see a list of steps. You can hover over each step to see its name. We see that we are currently on the first step; it's quite self-explanatory. On the right side, we see the deadline for completing this step. We can look at the complete process chain to get an idea of what lies ahead, how many more steps there are, what possible outcomes there are, and so on. Here, we can also view the action history for the process. In this case, it's very small because the process has just begun. Next is the main and central block, which is visually highlighted compared to the others. In the central part, we see the first hint, which is a call to action for me, and it describes in detail what I need to do at this specific step. When you, as the project administrator, as the creator of the business process, create each step of the future process, you provide this hint yourself. You can write it in such detail that any employee who enters this process wouldn't need to read some regulations, wouldn't need specific training, or have to take a course in the academy. They could just come here and see a clear instruction. In this case, we see, "Click the 'Fill in Request Data' button, fill in all the necessary data." And if you've accidentally created the process, you can close it using the cancel button. Let's start filling in the data slowly. Also, about the right part, it basically just displays the history of steps. We will see it slowly filling in as we move through the process.

### Filling Out the Hiring Request

[Filling Out the Hiring Request](https://www.youtube.com/watch?v=v9ob-3hPq-Y&t=280.0s)

So, we are selecting the "Fill in Request Data" step. Here, we are required to fill in several mandatory and optional fields. These fields are defined by the creator of the process. By creator, I mean the administrator of business processes. For example, if I, as a sales department manager, am using this process, it might have been created by the commercial director. So, what do I need to do to request a new cold sales manager? I need to fill in a specific request. Obviously, the process is structured in such a way that when I fill in this request, it will be forwarded somewhere for approval to my manager, then somewhere to HR, where the appropriate recruiter will be selected, and the search for an employee will begin. Therefore, let's fill in this request together. In this case, I won't go into great detail about the fields. I'll reiterate that these fields are defined by you when creating and administering the process. But in this case, let's say, based on the legend of this process, we need to specify key skills, showstoppers, to whom this employee will report, who will conduct the final interview, who will make the decision, upload a test assignment if necessary. We specify the motivation system here, the reason for creating the vacancy, the number of people we need for this position, employment type. In your case, these could be completely different fields, a different number of fields. You are free to create your own process. So, I've filled in everything, and now I move on.

### Second Step: Approval by the Manager and Returning the Request for Revision

[Approval by the Manager and Returning the Request for Revision](https://www.youtube.com/watch?v=v9ob-3hPq-Y&t=377.0s)

The process has moved to the next step. In this case, it's the approval of the request by the manager. We can see that the process has progressed according to the scheme, and we see that the content has changed in the central part, and in the right part, in the step history, we see that the completion of the first step, creating the request, was recorded by me. In this step, I'm once again responsible because I'm going through this process from an administrator's perspective. To simplify without switching between different screens and to avoid confusion, I will go through this process as one employee who has access to all steps. However, according to the logic of this process, initially, creating the request is done by department heads, employees at the department head level. Approval of this request is done by their manager, in this case, which is me. What do I see here? Again, a clear hint tells me to study the data and either reject or return the request for revision or approve it. I see all the necessary information that I need; it's generated from the data filled in by the employee on the previous step. In this case, all data is displayed, but, again, you can configure it to show only the most critical and important information for making a decision. Let's assume that if I'm missing something here, I can return this process for revision, provide a reason, for example, why I find the motivation system strange, it's different from what our current employees have. I ask a question like this and send it back for revision. The process will go back to the first step to the person who created it, and they will need to make changes to the motivation system and send me the process again. Well, in general, let's do this together to visualize it. So, we see that the process has returned to the first step. In the right part, we see the comment for which it was returned. In this case, we see "correct the motivation system." The manager did not approve the request; they returned it. As the creator of the process and the sales department manager, I go back to the filled fields and correct the motivation system. Let's say, for instance, I've corrected it to be more appropriate.

### What the Revised Request Looks Like

[What the Revised Request Looks Like](https://www.youtube.com/watch?v=v9ob-3hPq-Y&t=515.0s)

I'm sending it again, and now the manager who has already seen this request once doesn't have to spend time going through all the fields again, trying to understand what's going on. The system highlights in yellow what has changed since the last time. I see from the history that I have already seen this request once and rejected it, stating that the motivation system needed correction. Accordingly, I see that the motivation system has been corrected. Well, I recheck it, and this time, let's say, everything suits me. In this case, I approve it and forward the request for further processing. These options we see here - approve, forward for processing, reject, return for revision - these are not pre-defined buttons that are available. Each of these buttons is created by you during the administration of the business process.

### Assigning the Request to the Executor

[Assigning the Request to the Executor](https://www.youtube.com/watch?v=v9ob-3hPq-Y&t=565.0s)

In our case, we've set up a mechanism where from this step, you can either proceed further, reject completely (meaning there will be no additional cold sales managers in our case), or return it for revision if something is not satisfactory. In your case, it could be different - one button, ten buttons, whatever is convenient for you. It depends on how your process branches and how many possible scenarios are present. In this case, I'm assigning the request for further processing, and I'm prompted to select the person who will actually handle this request. In this case, the HR director is automatically assigned because the settings indicated that the next responsible party should be an employee in the position of HR director. Well, comments are not obligatory in this case; for instance, I'm not leaving any comments. We proceed further, and we see that the process has reached the employee we specified. Again, I won't repeat myself, but we have another hint, available information, and available actions. Let's say we proceed further and assign a recruiter who will be responsible for the actual search. Here again, an employee is automatically assigned; in this case, it's the head of the personnel department. They will now deal with this request. Now, the head of the hiring department needs to appoint the person who will be directly responsible for staff recruitment. In other words, at their level, for example, they've reviewed the request, understood that they've taken on this task for their department, and now they are distributing it to those who should handle it. You can assign it to several managers at once if it's an urgent position to involve multiple personnel recruitment managers to close it faster. Well, let's say we'll keep the one who is selected by default.

### Request in Active Search Status

[Request in Active Search Status](https://www.youtube.com/watch?v=v9ob-3hPq-Y&t=669.0s)

Now, the request has moved into the active search status. What can the employee responsible for staff recruitment do from here? They can add new candidates. For instance, they may have gone to HeadHunter or other sources to find potential candidates, had initial conversations with them, and realized it's worth considering further. They can add these candidates here, including their contact information, date of birth, and attach their resume, among other details. Once again, the fields that we need to attach to the applicant can be defined during the administration of the business process. In our case, this is a minimal set of fields, and we even forgot to include the phone number. However, it's easy to add, meaning during the editing of this applicant from the administrator's side, we can add any field, including the phone number. So, in our case, we'll add the applicant's full name, upload the resume, and click the "Continue" button.

### What a Subprocess Looks Like

[What a Subprocess Looks Like](https://www.youtube.com/watch?v=v9ob-3hPq-Y&t=736.0s)

In this case, a subprocess is created. Our original process remains in the active search status because, understandably, we haven't found a person yet, so it can't be closed. A subprocess is created for the consideration of a specific candidate, and it has its own steps. We won't go into detail about these steps here, but the logic is clear. We see initial interviews, candidate assessments, scheduling interviews with the client, interviews with the client, job offers, document preparation for onboarding, and so on. At each stage, there are possible negative outcomes from this process. The client might reject the candidate because they didn't like them, or HR might reject them. In such cases, a comment would be added, explaining that the candidate was not suitable due to various reasons like inadequate qualifications or lack of experience. This comment will naturally remain in the system permanently. Later, if someone else tries to attach the same candidate to another hiring request, they will see that such a candidate exists and view the comments stating that we previously rejected them, advising against considering them again.

### Manufacturing Business Process

[Manufacturing Business Process](https://www.youtube.com/watch?v=v9ob-3hPq-Y&t=802.0s)

Let's take a look at another example for a better understanding, such as the process of transferring a product into production. Imagine you have a manufacturing facility, and you've created a prototype product that everyone likes. Now, you're planning to proceed with mass production. To do this, we create a process for creating production tasks. Here, we see a clear prompt: "Fill in all fields and submit the task for production." What do we need to do here? We need to fill in the fabric article, specify the quantity, let's say 500 units, and upload a photo of the product so that there's no confusion about what is going into production. So, we've filled everything out, and now let's move forward. Next, this order goes to the person responsible for distributing these orders. They check if all the necessary information is provided, like the fabric article and quantity. Then, they choose the department where this product will go for production. In our case, we'll select an executive from the department heads, add a comment, and send it further. Let's take a look to see how this can work in practice. After creating the task, it goes to the order distribution step. Following that is the preparation of accessories and fabrics. This means, for a specific quantity of products, we need to check if we have enough fabric and accessories. As we can see, from this step, there's an option to move to the conditional "Order Accessories" step. This means if we are short on fabric or accessories, we can place an order. Then, we move on to the "Sewing" step, followed by quality control, acceptance, and eventually, the product is completed. Of course, at each of these steps, you can set the sequence of actions and the necessity to fill in specific fields according to your requirements. The business process mechanics allow you to create a process that ensures nobody forgets their responsibilities. For example, it prevents the product from being sent for sewing if you haven't checked whether there's enough fabric or accessories.

### Page for All Business Processes

[Page for All Business Processes](https://www.youtube.com/watch?v=v9ob-3hPq-Y&t=992.0s)

Let's briefly talk about the page for business processes. We'll make a separate video about how to work with it, but to summarize, this page lists all the processes available to you. Here, you can apply various filters. For example, in this case, we see completed processes today. In principle, it's self-explanatory: processes with the status "completed" and with a deadline today. If we need, for instance, my overdue processes, we can see those as well. These are my processes that are overdue, meaning there's no work in progress today. So, any employee sees what's available to them and what requires their attention. From here, they can work with these processes. For example, let's switch to "My processes in progress." We can see two requests that are not only overdue but significantly overdue. The "Approval of Hiring Request" is overdue, and we can see who is responsible for the current step. In this case, it's me. We see who initially created this process, where it's currently located in the workflow, and if someone completed any steps, we see that information too. We can click here to finalize this process.

## 11.2 Business Processes: Configuration

### Starting the Creation of a New Process

[Starting the Creation of a New Process](https://www.youtube.com/watch?v=Xr7QXy0VzFc&t=0.0s)

Let's start with the business process builder. This is where you create your processes. Let's try creating a new process. Here, you can choose a parent process right away. What is a parent process? If you have a chain of processes, like in the example of a hiring request, where we first created the hiring request and then could create specific candidate reviews from it. When we created a candidate review process, we indicated that the parent process was the hiring request. This field is not mandatory; your processes don't have to be connected. However, if you have a sequence of interconnected processes, you can specify the initial one.

### Creating a Process Entity

[Creating a Process Entity](https://www.youtube.com/watch?v=Xr7QXy0VzFc&t=45.0s)

Next, you can create process entities within this process. What are these? In the example of a hiring request again, the entity was the applicant. It was a card for the applicant with details like name, phone number, necessary data, comments, recruiters, and so on, for managing them. However, these entities can be absolutely anything – your clients, contractors, business partners, and more. You can create the necessary data yourself. For instance, in this case, we see that there are already some existing entities. Let's create a new one – it will be a "Contractor." Add a field – we're prompted to choose from existing ones. Let's pick from the existing options: first name, last name – these are straightforward. We can see that there are no existing fields for requisites. Let's create a new one for the TIN (Taxpayer Identification Number). We'll also create another for the OGRN (Primary State Registration Number), and so on. We won't continue creating more fields. Now, let's see what we have here. We have field types, and I think that's self-explanatory. What kind of value should this field hold? Is it numerical, textual, long text, dates, and so on? In our case, for the TIN, it's numbers, for example. Next, we see a setting that allows us to specify where this field can be visible. Either in absolutely any business process involving a contractor, it will display this field without any additional restrictions. Or the TIN of the contractor will only be visible in specific business processes, and it won't appear in others. In this way, for instance, names and surnames are visible everywhere – that's clear. A contractor without a name would be an odd entity. However, something like the city in which you interact with this contractor might only be needed in one specific process. For all other processes, when sending closing documents to this contractor or in other contexts, this city field might not be necessary. To avoid it being displayed unnecessarily and causing confusion, you can specify that this field should only be visible in a particular process and link it to the corresponding process. Now that we've added an entity, let's move on to adding steps. Entities are not mandatory – not every process requires the creation of entities. Many processes can be completely without candidates, contractors, clients, and so on. They can be atomic processes, like the one we discussed earlier for transferring a product into production.

### Adding Steps

[Adding Steps](https://www.youtube.com/watch?v=Xr7QXy0VzFc&t=214.0s)

What do we see in the step editor? At first glance, it may appear to be a complex interface, but it's actually quite simple. Here we have steps. If we collapse a step, we can see that there's one step currently. Let's add a new step – I'll simply call it "Step 2." I'm collapsing it, and I see that I now have two steps in this business process. Therefore, I can delete a step, add a step between them, or add steps at the beginning or end – it's all clear.

### Data for Transitioning to a Step

[Data for Transitioning to a Step](https://www.youtube.com/watch?v=Xr7QXy0VzFc&t=251.0s)

Let's understand the step itself. What do we see here? Firstly, there's a settings block called "Data for Transitioning to a Step." What is this? These are the mandatory and optional fields that need to be filled when transitioning to this step. For example, when I created a hiring request, to send it for approval to the manager, as we remember, I had to fill in a bunch of fields related to motivation systems, the reason for the position, the job title, and so on. These fields are defined in this configuration. Let's say we specify a field here – it will be the same job title. We won't come up with a real use case right now; we're just looking at how it works. So, we've made the job title a mandatory field to enter the first step of this process. Automatically, the entity that we created in this process has been added here. To enter this very first step, one would need to fill out this entity, which we created – the contractor entity.

### Step Information

[Step Information](https://www.youtube.com/watch?v=Xr7QXy0VzFc&t=319.0s)

Next is the step information, a settings block called "Step Information." What do we have here? Firstly, we configure access and positions. How does this work? Here, in this case, we can select the positions whose employees can access the first step, in other words, create this process. For example, let's say it's not just the CEO who can create this process. Next, we have a description field for the performer. This is the hint that should tell the performer what to do with this process. Then, we can configure what information should be displayed in this step. In other words, if certain fields needed to be filled to enter this step, those fields should be displayed in this step. In this case, all fields from this process are already set to be displayed, although we can choose specific ones. Let's say we specified the job title field above. We can indicate that only this field should be displayed. By default, all fields are displayed, but there are situations where you have a very long process, perhaps the tenth or fifteenth step. Prior to this, hundreds of fields were filled out, but the specific step is atomic and doesn't require all those fields to make a decision. It only requires one or a few. Returning to the hiring analogy, you might have had a lengthy process where a candidate was reviewed, their motivation was assessed, job instructions were created, and so on. Then it came to a question for the accounting department. The accountant doesn't need to know the candidate's key skills; they're concerned with the candidate's position in the organizational structure, their salary, the salary component, and so on. Therefore, you specify that only the job title, salary, motivation system, and so on should be entered for the accountant's step, but not all the other fields. The same applies to entities. If you have several entities in the process, not just one contractor, and you've added several of them, you can specify here what should be shown if multiple entities are filled in. By default, again, everything is shown. Step deadline – this is self-explanatory. You add the number of days, hours, or minutes here. For instance, let's set it to one hour. This means it's a process that requires immediate action, and it should be completed within an hour of creation. You can separately indicate whether the deadline can be extended. If you don't check this option, the performer won't be able to extend the deadline. Next, there's a setting to mark the process as completed in this step. This setting is only necessary for final steps. In the case of mass production, the final step was "Product Ready." In the hiring request, there were many final steps: "Rejected by Manager," "Rejected by HR Director," "Candidate Declined," and so on. In this case, this is the first step, so we don't need this setting here.

### Action Buttons in a Step

[Action Buttons in a Step](https://www.youtube.com/watch?v=Xr7QXy0VzFc&t=508.0s)

Next, we have the buttons that we saw earlier when I was transitioning between processes. The buttons are available on this step. The "Cancel" button, for example, could be of some red color because it will close this process. In contrast, the "Send for Approval" button might be green because it will advance the process. For each button, we specify a name and then choose an action to be performed upon pressing it. Currently, there are only two actions available, but the number of actions will increase because these buttons are tied to possible process mechanics. Let's, for instance, examine transitioning to a specified step, which is the most common use case for buttons in a business process. We select "Transition to Specified Step," and then we need to choose which step the transition will go to. We've already created a second step below, and currently, it's the only option. Additionally, each button can have multiple actions. This means you can have a transition to a step and simultaneously open a process, for example. However, we won't do that right now.

### Creating a Final Step

[Creating a Final Step](https://www.youtube.com/watch?v=Xr7QXy0VzFc&t=577.0s)

To enable cancellation, we need to create another step that will be one of the final steps. Let's give it a somewhat unclear name, "Cancelled," and make it require a mandatory reason. The person responsible for this step will be the same as the one responsible for the previous step. We won't need the rest of the settings here. We specify that this process will be considered completed. Now, we go back to our first step and specify that when the "Cancel" button is pressed, the process transitions to the specified step, which is "Cancelled."

### Configuring the Second Step of the Process

[Configuring the Second Step of the Process](https://www.youtube.com/watch?v=Xr7QXy0VzFc&t=616.0s)

Now, let's return to configuring the second step, which comes right after the initial first step. Let's add a field here and specify who the performer should be. In this case, it could always default to the person who completed the previous step, i.e., the same person who initially created the process. However, you can configure quite a few settings here. For instance, you can specify the supervisor of the person who closed the previous step. This is very convenient for processes that require approval. Initially, an employee creates a request, and then their supervisor approves it. Again, there should be a description for the performer. In the displayed fields, let's, for instance, specify only the mandatory field required to transition to the step. We won't specify the fields filled out earlier. For example, let's assume that in this process, all previous fields are not of interest and unnecessary. We won't specify a deadline either. Let's move on to the action buttons. Suppose we create a mini-process here. In this case, we'll have a final button. Here, we have the option to go back to the previous step, essentially to return. If we select it, there's an option to require a reason. Now, let's add a step here. First, we'll create a transition to a specified step. Then, we'll create a "Return" action, and the "Return" action will be a transition to the previous step with the mandatory requirement of a reason. We'll go through all of this together to visually understand the outcome.

### Final Approval Step

[Final Approval Step](https://www.youtube.com/watch?v=Xr7QXy0VzFc&t=722.0s)

So, it's clear that from the final approval, we should move to a step that we'll call "Finally Approved." It's always better to name steps according to the process status. For example, when setting up a sales funnel in CRM, it's best to configure steps the same way. Suppose, for the final approval from a manager, no fields need to be filled in. We specify that we're not interested in or need any fields. We can move on to the next step. For manager approval, no fields need to be filled in either. We specify that this is also a completed final step. Let's write some hint here as well: "Request approved." Now, let's go back to our "Finally Approve" button. It transitions to the specified step, which we just created, "Finally Approved." Alright, now it seems like we've put together a mini-process. Let's create it. There we go, we've created the process. Let's go ahead and start it.

### Launching the First Scenario of the Process

[Launching the First Scenario of the Process](https://www.youtube.com/watch?v=Xr7QXy0VzFc&t=774.0s)

Let's find our process. Here it is, the new process. Let's try to open it. We see that we need to fill in the counterparty, which we made mandatory to fill out in the first step. And the job title, which we also made mandatory in the first step. Let's say it's "Product Manager." And the counterparty is "Peter Ivanov." Here, I can choose from existing ones. I've specified a specific name here. If there were such counterparts, we would simply choose them. But we've just created the entity, so there are none. We've filled in the required information. We create it. As we recall, in the step where an employee can create a process, only the CEO was specified as the person who could do that. Therefore, I can't change the performer here right now. We see that the process has been created. Here it is, our process. It's very small and simple. First step, second step. In this mini-scheme, all the final steps are represented in one point to avoid any false impressions when navigating through this process. In reality, there are only two steps, and then some sort of final step. But if canceled and finally approved were displayed as separate points, it would look like there are actually four steps. That would be misleading. So, what do we see? Here's our detailed instruction hint that we created in the first step. We see the counterparty and the available information that we initially entered ourselves. Our "Cancel" and "Send for Approval" buttons. Let's click on "Cancel." As we recall, it should transition the process to the "Cancelled" state. Let's see. There we go, we see that our process has moved to the "Cancelled" step. Our final hint serves as a sort of verdict. Now, anyone who enters this process, you can refresh the page to simulate the first time entering this process. We'll see this picture. The business process has been closed. The hint we wrote ourselves tells us what happened here. We see the history, meaning when the process was created, when the first step was completed, and then when the entire process was completed. We can review the entire history, what was done and how it was filled out at this step. That's about it. This process with you has been completed.

### The First Scenario of the Process

[The First Scenario of the Process](https://www.youtube.com/watch?v=Xr7QXy0VzFc&t=922.0s)

Now let's explore another scenario with it. Let's create a new one. Fill it out. Ah, here we can choose from existing ones. We see our counterparty, Peter Ivanov. We'll create another process with him. We've created a new process. Now let's follow the positive scenario, send it for approval. Here, we have one of those mandatory fields that we specified. The process has moved to the second step. Here, as we remember, we configured it so that only specific information is displayed. In the previous step, we entered the job title, as you recall. It's not displayed here because it might not only be unnecessary but also excessive information for the performer of this step, which should be hidden. So, what do we have here? We can go back, we can finally approve. I forgot to color the buttons; they are blue by default, but you can always select them. For example, for moving forward, you can choose some green color, and for canceling or rejecting, some red color, and so on. This is just for the convenience of those who will be going through these processes. So, what can we do here? Well, let's finally approve it. As we recall, for the final approval, we didn't require any additional fields to be filled out. There we go, we've closed this process too. So basically, we've created a mini-process together. We've gone through it entirely, and we've seen how it works.

### The Second Scenario of the Process

[The Second Scenario of the Process](https://www.youtube.com/watch?v=Xr7QXy0VzFc&t=922.0s)

So, in the filter, we can find processes like these with you. Let's, for example, take a look. These are new processes. Let's find new processes in any status, with any performers. Here they are, two new processes. They are both closed; they are displayed in a grayish color. By entering any of them, we can view some more detailed information. So, we see that it's canceled, and we can view the history, and so on. Thus, with the help of business processes, you not only systematize the step-by-step activities of your employees, it's like a new step compared to regulations. Writing regulations is one thing; it's already not even the basic level but the absolute minimum. Making sure that people learn these regulations, that people somehow read them, get acquainted with them through training systems, through academies, that's already much better and stronger. But by creating processes like these, in which you can't make mistakes even without regulations, that's like the highest level. And this highest level can be achieved with the help of business processes in Platrum. An additional plus is that now you have the entire history saved. So, you can always see this; what we've just created is a very basic process without any specific connection to reality. But when it's your real process related to sales, there are so many different stages where something needs to be approved, where you need to go through specific points, get approval for the commercial proposal, first show it to the CEO, then if there's some discount applied, maybe unique or something else, it goes to the Commercial Director. If it's a very large client, you need to make a special offer, there are different processes involved, and so on. To keep all of this in mind, not relying on human factors, you can formalize everything and create these business processes like this. On the entity configuration page, I didn't tell you about it here, but it's pretty straightforward. All the entities you've created in different processes are displayed here. Here's our counterparty, which we created last time. Here, you can simply go back to its settings, rename it, add more fields, delete some fields, and so on.

### Changing an existing process

[Changing an existing process](https://www.youtube.com/watch?v=Xr7QXy0VzFc&t=1146.0s))

An important point regarding the constructor: if we make changes to an existing process, all the instances of that process that are already in progress will not change. This is because it would lead to a series of errors and issues. For example, someone is currently in an open process at specific steps, and you delete that step. In theory, that step should disappear along with all the work. However, you may have made significant changes to the subsequent process. Then there may be a series of problems. So, if you modify an existing process, nothing will break. That's the first point. But secondly, you should understand that only processes created after the modification will take these changes into account. Those created before will not. They will remain a snapshot of the business process as you originally configured it.