

# PARTNERS TRAINING SESSION 1



# Transformation Suite

This course is intended for the system administrator users and enterprise architects whose goal is to depict the organizational structure in Comidor, create users and define access rights.

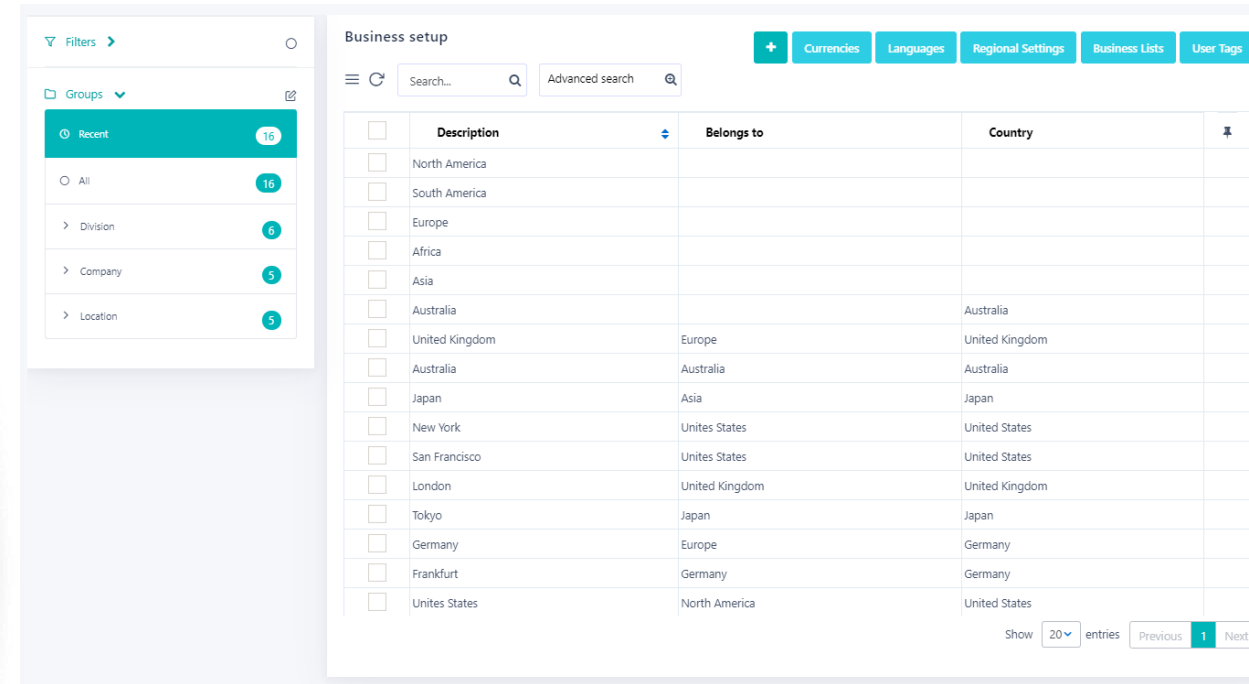
Business Architecture units include:

1. **Business setup**, where you add Companies, Divisions, Offices and Regional Settings.
2. **Organizational Chart**, where you depict your organisational structure
3. Process mapping/categories and lists



# Business Set up

- Set up your business and break it down into multiple divisions, companies and offices, enabling you to create competitive market advantages
  - This step is required at the initial set up of a Comidor account
  - At least one Business Entity is prerequisite to create users, roles, etc.
- Switch between different currencies, languages and locations
  - Calculate Incomes and Expenses in multiple currencies to facilitate your international sales
  - Display Pricing consistently and avoid unexpected costs
  - Select your Language from the comprehensive list
  - Allow divisions and groups that speak different languages to cooperate constructively
  - Those units are mostly used in Project Management package
  - At least one Currency is prerequisite to create Business Entities



[Find out more here.](#)

# Regional Settings

- Define working schedules, public holidays for every region or for different time schedules (full time / part-time) or different companies/divisions.
- Regional Settings must be defined every year.
- The Region Code is used in the Employment/ Working assignment of a Personnel record.
- In Schedule creation:
  - Populate the basic info of the Schedule such as region and year
  - Set the **Working** hours schedule
  - Add the dates of the **Public Holidays** and a short description
  - Set the **Annual Leave Entitlement** per absence type.

A screenshot of the "Regional Settings" form. It has a search bar at the top. Below it is a table with a "Region" column and a checkbox column. The first four rows are labeled "Germany" and the last two are labeled "UK". The third "Germany" row has its checkbox checked.

Region	
Germany	<input type="checkbox"/>
Germany	<input type="checkbox"/>
Germany	<input checked="" type="checkbox"/>
Germany	<input type="checkbox"/>
Germany	<input type="checkbox"/>
UK	<input type="checkbox"/>
UK	<input type="checkbox"/>

## Germany - 2021

A screenshot of the "OWNERSHIP" form for "Germany - 2021". It contains a table with four rows: "Created on", "Created by", "Updated on", and "Updated by".

OWNERSHIP	
Created on	Feb 24, 2021 14:02:22 PM
Created by	Richard Newton
Updated on	Feb 25, 2021 12:20:16 PM
Updated by	Richard Newton

A screenshot of the "Work hours schedule" form for "Germany - 2021". It shows a table with columns for "Start" and "End" times for each day of the week. To the right of the table is a grid of buttons labeled "All", "1", "2", "3", "4", and "5". The "All" button is highlighted in green for each day. Below the table, it says "Total hours: 40 hours and 0 minutes / week".

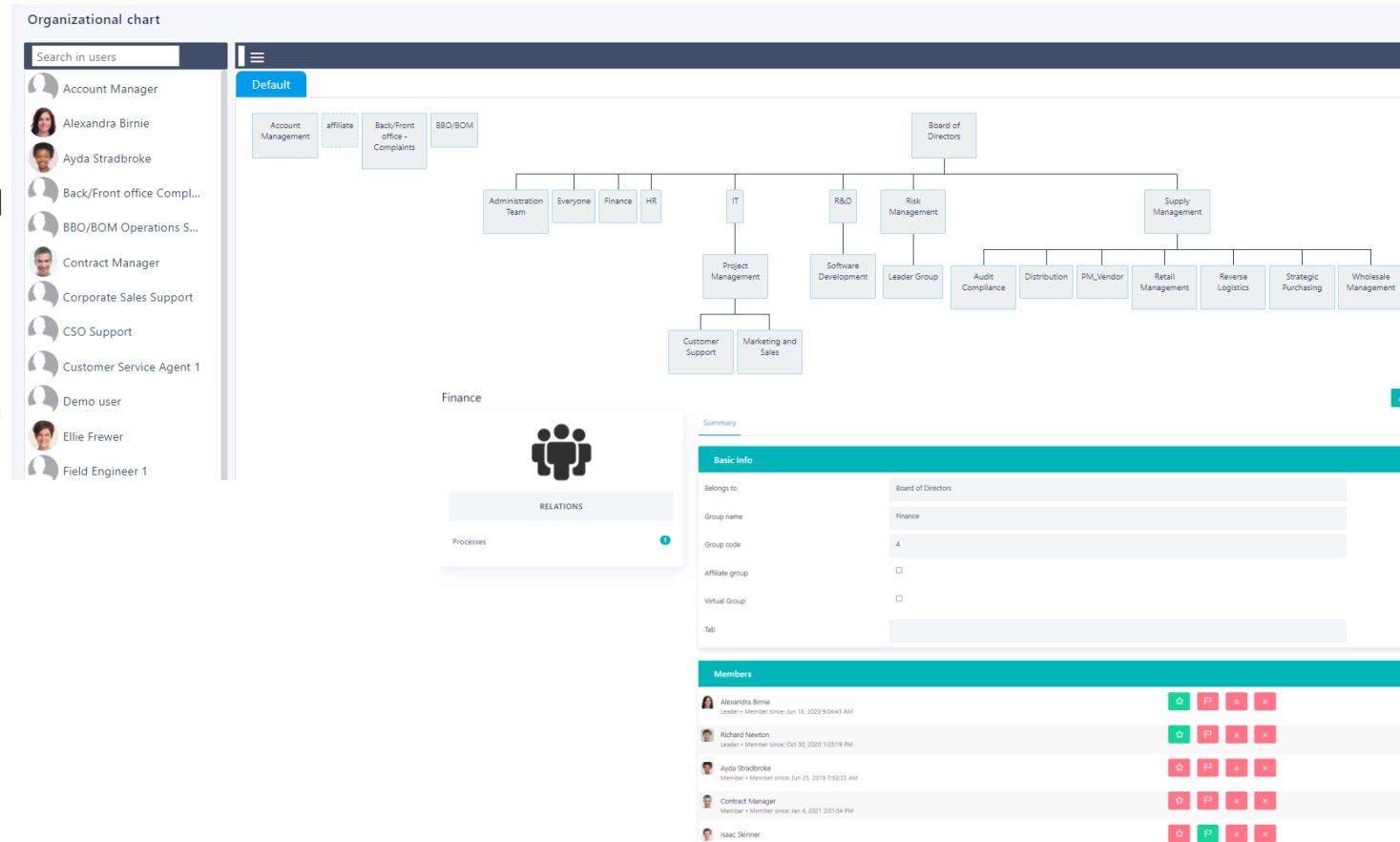
	Start	End	Start	End	
Monday	09:00	13:00	14:00	18:00	All 1 2 3 4 5
Tuesday	09:00	13:00	14:00	18:00	All 1 2 3 4 5
Wednesday	09:00	13:00	14:00	18:00	All 1 2 3 4 5
Thursday	09:00	13:00	14:00	18:00	All 1 2 3 4 5
Friday	09:00	13:00	14:00	18:00	All 1 2 3 4 5
Saturday					All 1 2 3 4 5
Sunday					All 1 2 3 4 5
Total hours	40 hours and 0 minutes / week				

[Find out more here.](#)

# Organizational chart

Depict your organisational structure and build functional teams

- **Make the structure** of your company **clear** to any employee
- Ensure that **information flows correctly** throughout the company. Groups, leaders and just members can be used as assignment options in tasks and processes.
- Design your [Organisational structure](#) and **fulfill your goals**
- **Enhance collaboration** between different departments in the organisation
- **Distinguish** between the **leaders** and the **members** of a group easily and illustrate the relationships among personnel
- **Organise** and **monitor** the company's performance by group



[Find out more here.](#)

# Process Map & Lists

List Management helps administer data lists (Categories) which are used in other modules. All Comidor users can create public category Lists (i.e. Account categories). [Users with system administration rights](#) have the overall authority to view, correct, edit, or delete Lists.

- Get a top-down view on how business processes are categorised
- Create business categories for every operation
- Add a new Business Function Category to a process
- View, manage and monitor all types of processes in Comidor Workbench



Unit List Management helps you administer data lists, that are used by other units.

### List Management

Search...

	Code	Value	Valid from	Valid to	Name
<input type="checkbox"/>	Intelligent Automation	Intelligent Automation	Feb 22, 2021	Mar 12, 2099	CHATBOT_CATEGORY_TITLES
<input type="checkbox"/>	Workflows	Workflows	Feb 22, 2021	Mar 12, 2099	CHATBOT_CATEGORY_TITLES
<input type="checkbox"/>	CRM	CRM	Feb 22, 2021	Mar 12, 2099	CHATBOT_CATEGORY_TITLES
<input type="checkbox"/>	Project Management	Project Management	Feb 22, 2021	Mar 12, 2099	CHATBOT_CATEGORY_TITLES
<input type="checkbox"/>	People Management	People Management	Feb 22, 2021	Mar 12, 2099	CHATBOT_CATEGORY_TITLES
<input type="checkbox"/>	Configuration	Configuration	Feb 22, 2021	Mar 12, 2099	CHATBOT_CATEGORY_TITLES
<input type="checkbox"/>	Collaboration	Collaboration	Feb 22, 2021	Mar 12, 2099	CHATBOT_CATEGORY_TITLES
<input type="checkbox"/>	Processes	Processes	Feb 22, 2021	Mar 12, 2099	CHATBOT_CATEGORY_TITLES
<input type="checkbox"/>	Communication	Communication	Feb 16, 2021	Mar 12, 2099	CHATBOT_CATEGORY_TITLES
<input type="checkbox"/>	App Builder	App Builder	Feb 5, 2021	Mar 12, 2099	CHATBOT_CATEGORY_TITLES
<input type="checkbox"/>	Enterprise Architecture	Enterprise Architecture	Feb 5, 2021	Mar 12, 2099	CHATBOT_CATEGORY_TITLES
<input type="checkbox"/>	Upper management	Upper management	Jan 14, 2021	Mar 12, 2099	CHATBOT_CATEGORY_TITLES
<input type="checkbox"/>	Wholesale clients	Wholesale clients	Dec 8, 2020	Mar 12, 2099	CHATBOT_CATEGORY_TITLES
<input type="checkbox"/>	2019	2019	Jan 1, 2020	Mar 12, 2099	CHATBOT_CATEGORY_TITLES
<input type="checkbox"/>	2018	2018	Jan 1, 2020	Mar 12, 2099	CHATBOT_CATEGORY_TITLES
<input type="checkbox"/>	2017	2017	Jan 1, 2020	Mar 12, 2099	CHATBOT_CATEGORY_TITLES

### New Process

Template: No Template - Generic Process

☆ Title:

Category:

☆ Scheduled start:

Scheduled end:

Timezone:

Assigned to:

Responsible group:

Search...

3.SALES AND MARKETING

4.SUPPLY CHAIN MANAGEMENT

5.HUMAN RESOURCES MANAGEMENT

5.1 Trainings

6.KNOWLEDGE MANAGEMENT

[Find out more here.](#)

# System Administration

Through Comidor System Administration, administrators can manage users and their Application Rights, monitor the system's health and allocate system's resources.

- Manage Users and Robot Users
- Coordinate your Personnel based on their Roles
- Assign Rights to Users

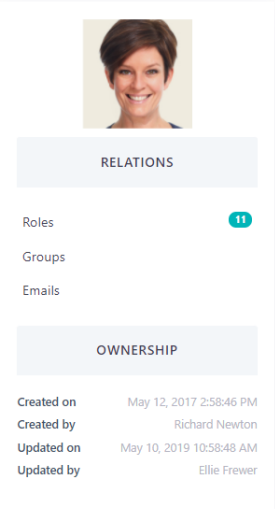


# Users & Roles

- The first user that is registered in Comidor is the System Administrator (Admin). The **Admin** is responsible for managing Comidor Users, creating Personnel and passwords, editing, deactivating a user, and more.
- Every time a new user is created a new record is inserted in Personnel table, with active state.
- You can create a new User and then modify their details in the [Personnel](#) unit
- After creating a user, you need to allocate specific Application Rights and add the user to a group(s) in the [organizational chart](#)
- System Administrator access is available only to users that have the Enterprise Architect role
- A user can be de-activated but not deleted.
- Rights can be assigned to an existing role that can be assigned to a user in User Roles. These rights (managed from the Application Rights unit) can give responsibilities such as handling financials, setting up users and their application rights, or handling people management activities e.g., absences.

[Find out more here.](#)

Ellie Frewer



**RELATIONS**

Roles 11  
Groups  
Emails

**OWNERSHIP**

Created on	May 12, 2017 2:58:46 PM
Created by	Richard Newton
Updated on	May 10, 2019 10:58:48 AM
Updated by	Ellie Frewer

Summary Contact Details

Save Cancel

First Name	Ellie	Category	
Last Name	Frewer	Job Title	SL-MAN Sales Manager
Title		Education	
Username	efrew	Principal Name	
Password	*****	Division	Europe
System Administrator?	<input type="checkbox"/>	Company	Germany
Data Manager?	<input type="checkbox"/>	Location	Frankfurt
User-Level	User	Contractual location	Frankfurt
Write Access	Protected	Timezone	Europe/Berlin
Add access to Mobile application	<input type="checkbox"/>	Locale	English (United...)





## Application & role rights



- Application Rights gives the ability to administrators to hide or allocate modules and menus to users e.g., you may want to let specific users have access to the financial module.
- With Comidor you can allow users to access certain modules but restricting their access to functions within those modules. Any role created can be managed in terms of Rights (e.g., which units from Modules will be visible for each role).
- This refers only to System Administrator Users.

### Application rights

[Available packages](#) [Role Rights](#)

Search...

Username	CRM	PM	ACC	BPM	HRM	ADMIN	APPFACORY	BASIC	
Richard Newton	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="button" value="Deactivate all"/>
Ayda Stradobroke	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="button" value="Activate all"/>
Alexandra Birnie	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="button" value="Deactivate all"/>
Kaitlyn Dalton	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="button" value="Activate all"/>
Charlie Marr	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="button" value="Activate all"/>
Isabella Hardey	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="button" value="Activate all"/>
Isaac Skinner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="button" value="Activate all"/>
Ellie Frewer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="button" value="Activate all"/>
Harry Bright	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="button" value="Activate all"/>
Contract Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="button" value="Activate all"/>
Robot User 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="button" value="Activate all"/>
Harrison Jones	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="button" value="Activate all"/>
Guest User	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="button" value="Activate all"/>
Demo user	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="button" value="Deactivate all"/>
Presales Manager								<input type="checkbox"/>	<input checked="" type="button" value="Activate all"/>
Presales Specialist								<input type="checkbox"/>	<input checked="" type="button" value="Activate all"/>
Corporate Sales Support								<input type="checkbox"/>	<input checked="" type="button" value="Activate all"/>

### Application rights

[Available packages](#) [Role Rights](#)

Search for a role

- ☒ Content Creator
- ☐ Database Administrator (DBA)
- ☐ Accounts Administrator
- ☐ Hiring Manager
- ☐ Interviewer
- ☐ People Manager
- ☐ Project Manager
- ☐ Resource Manager
- ☐ Team Leader
- ☐ Engineer/Application Developer
- ☐ CEO
- ☐ Consultant
- ☐ Project Coordinator
- ☐ Business Analyst
- ☐ Content Editor
- ☐ People Management Officer

[Analytics](#) [Workflow Reports](#) [Timecards](#) [ActivityMenu](#) [Widgets](#) [Daily Utilities](#) [Business set up](#) [Daily Utilities](#) [User Management](#) [HRM Reports](#) [Quick Add](#) [PM Reports](#) [Application Setup](#)

[App Factory](#) [Packages](#) [My Company](#) [Accounting and Finance](#) [CRM Reports](#) [People Management](#) [Process Orchestration](#) [Reports & Analytics](#) [Project Management](#) [Financial Reports](#) [Process Automation](#)

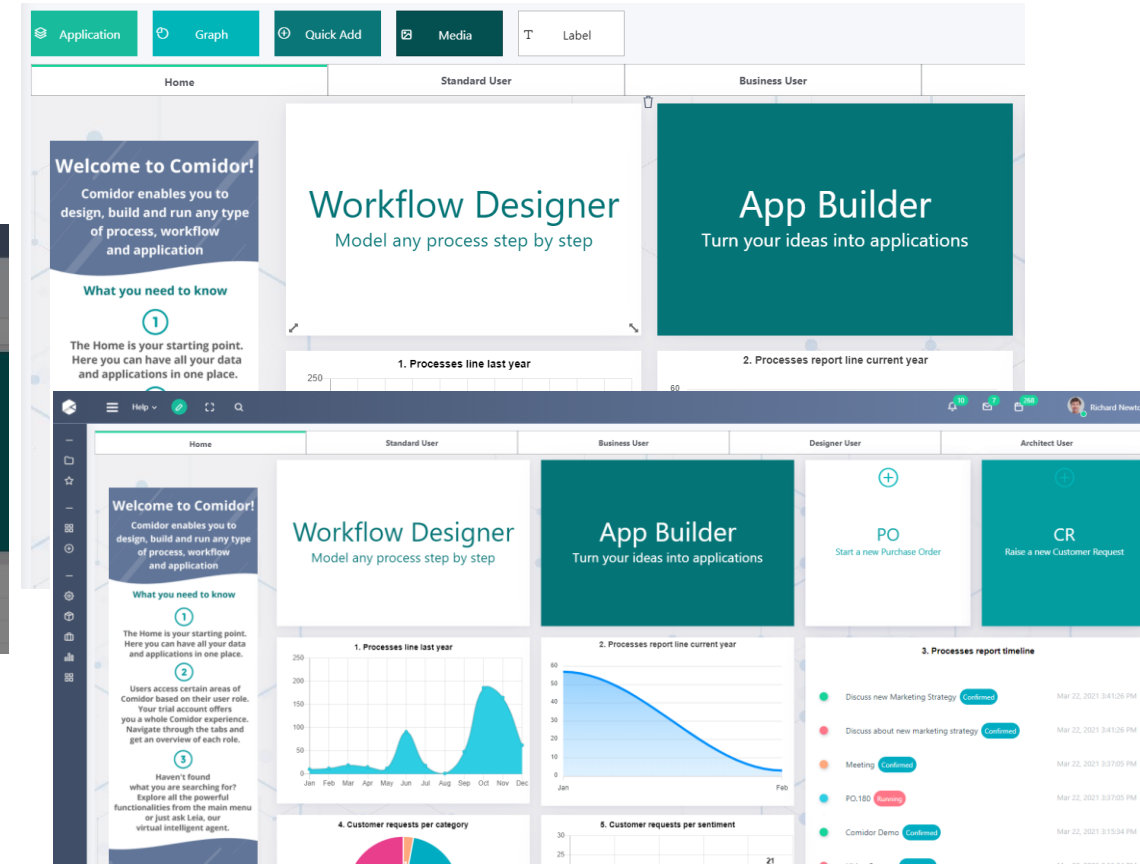
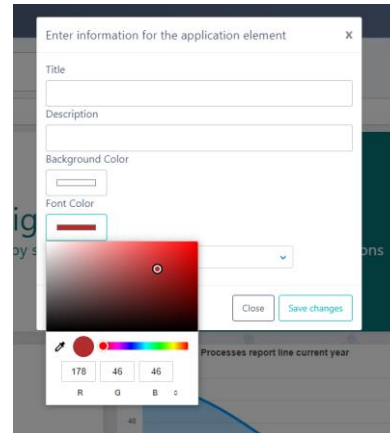
[Approvals](#) [UserAppMenu](#)

Unit Name	Description	Disable All
Projects		<input checked="" type="checkbox"/>
Work Packages		<input checked="" type="checkbox"/>
Progress Management		<input checked="" type="checkbox"/>
Earned Value Analytics		<input checked="" type="checkbox"/>
Personnel Booking		<input checked="" type="checkbox"/>
Customer Complaints		<input checked="" type="checkbox"/>
Lessons Learned		<input checked="" type="checkbox"/>
Project Actions		<input checked="" type="checkbox"/>
Rag status Parameters		<input checked="" type="checkbox"/>
Risks		<input checked="" type="checkbox"/>

Find out more here.

# Home Dashboard

- The default screen in Comidor is the Home Dashboard. The new Home Dashboard saves you time, offering exactly what you need in one single panel. With all your applications and widgets in one place, your work has never been easier.
- Create a more customised experience that matches your daily tasks and processes. Build and modify your dashboards with a simple to use no-code builder.
- Add multiple tabs, application tiles, “quick add” tiles, graphs, media(images/videos), and labels.
- Customise your dashboard easily with drag-n-drop tiles and add the colors you wish, resize or delete them.



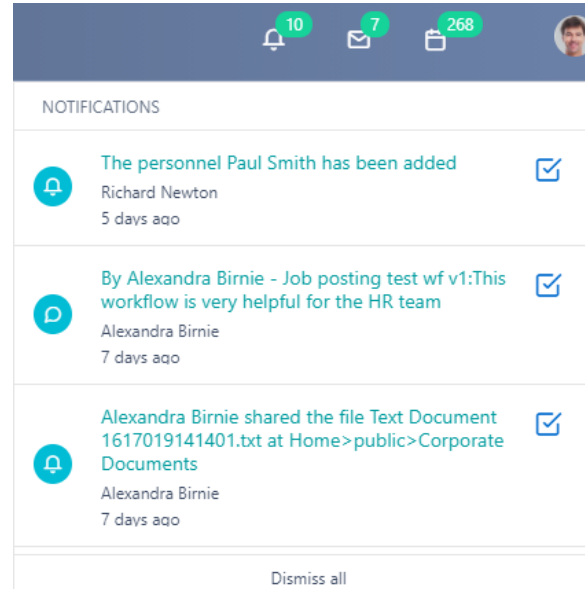
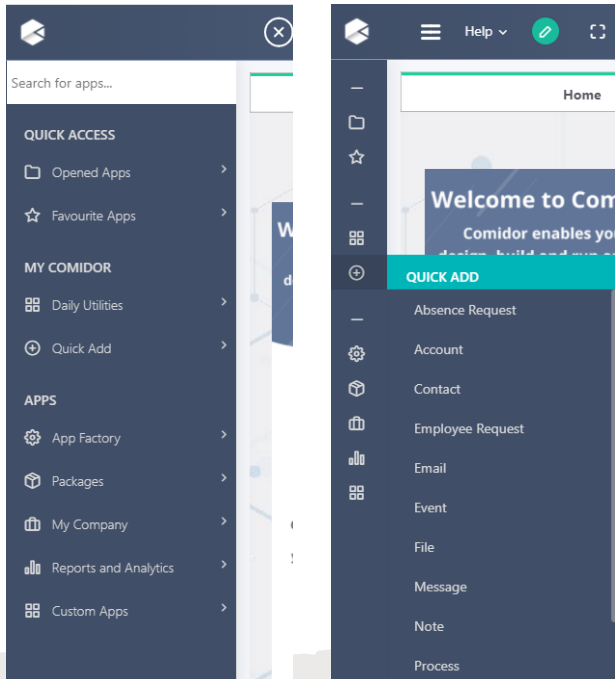
[Find out more here.](#)

[View video here.](#)

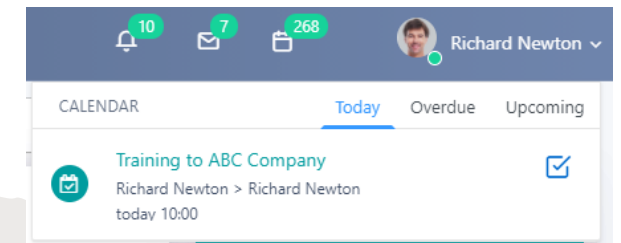
# Menu & Notifications

Comidor is designed to enable users to focus on their tasks and prioritize their workload.

Menus, filters, icons, buttons and lists are all designed and arranged in a way that allows users to easily identify their needs and tasks and execute quickly and efficiently.



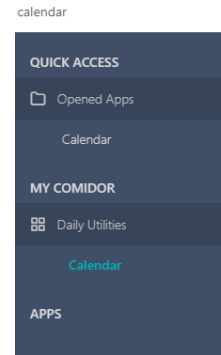
- In the top right of the page is the Notifications Bar. There are three icons and when a new notification is received a blue box will appear next to the relevant icon. The five icons are:
- **Notifications**
  - **System Notifications** These inform the user when a new task/process is added; when it's time to start a new one; when someone has shared a folder or when an existing task/process has been completed. [Reminders](#) will show up here as well. These [Notifications](#) are also in the [Workbench](#) Activity Stream.
  - **News** – When someone has commented on a specific [Process](#) or [Task](#) a notification will be displayed here. Notifications regarding specific Comidor objects are displayed here as well
- **Messages** – When a new [Email](#) is received the alert will be displayed here. Customise Email notifications in User Settings
- **Calendar** – The [Calendar](#) icon opens a Calendar that shows your tasks for the current day



# Tasks & Calendar

Comidor Tasks offer a reliable and transparent approach to Task Management. It manages personal tasks, team tasks, assigned tasks and tasks assigned to other users. All Comidor tasks can be managed, even if they have been created using another Comidor unit (Quick Adds or Calendar).

- Tasks can be created for completing a one-off task, e.g. write a report on the impact of GDPR.
- Tasks can also be linked to a Process.



Comidor provides a fully interactive calendar where you can monitor your activities (tasks, meetings, assignments, events, etc.) and orders (assigned tasks) on a daily, weekly or monthly basis.

A screenshot of the "Quick add: Task" form in Comidor. The form is divided into several sections: "Schedule the task" with fields for Title, Assigned to (Richard Newton), Supervised by, Task type, Date/time/hours, Process, Account, and Description; "Complete the task" with fields for State, Date/time/hours, and Quantity/Amount; and a "Details" section with "Basic Info" (Title, Assigned to, Priority, Scheduled start/end, Duration, Activity, Process, Account) and "Description" (Status, State, Start, End, Duration, Output, Quantity, Amount, Report). The form has a "Save" button and a "Cancel" button.A screenshot of the Comidor calendar view for April 2021. The calendar shows a grid of days from Monday to Sunday. Tasks are listed in the calendar cells, including "NDA Agreement" and "Training to ABC Company". The tasks are color-coded and include duration information (e.g., "2.00 hours"). The calendar has tabs for "Month", "Week", and "Day" views, and a "Today" button.

[Find out more here.](#)

[Find out more here.](#)

# Training Objectives

- How to create and manage users, roles & rights in Comidor platform
- Understand how to depict your organisational structure and build functional teams
- Learn how to navigate in the platform through main menu and customize your home dashboard





**Thank you!**