Partners Introductory Training Session 1

What is Comidor?

- **DIGITAL WORKPLACE**
- Interactive & customizable dashboards Collaboration apps & knowledge tools

- **HYPER-AUTOMATION**
- BPM & Workflow Automation RPA & AI/ML Process Intelligence

- **LOW-CODE App builder**
- App creation in 10 simple steps

- **MARKETPLACE**
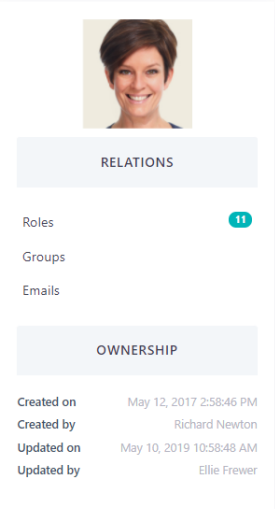- Out-of-the-box business apps

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 <u>not</u> 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.

Organizational chart

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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
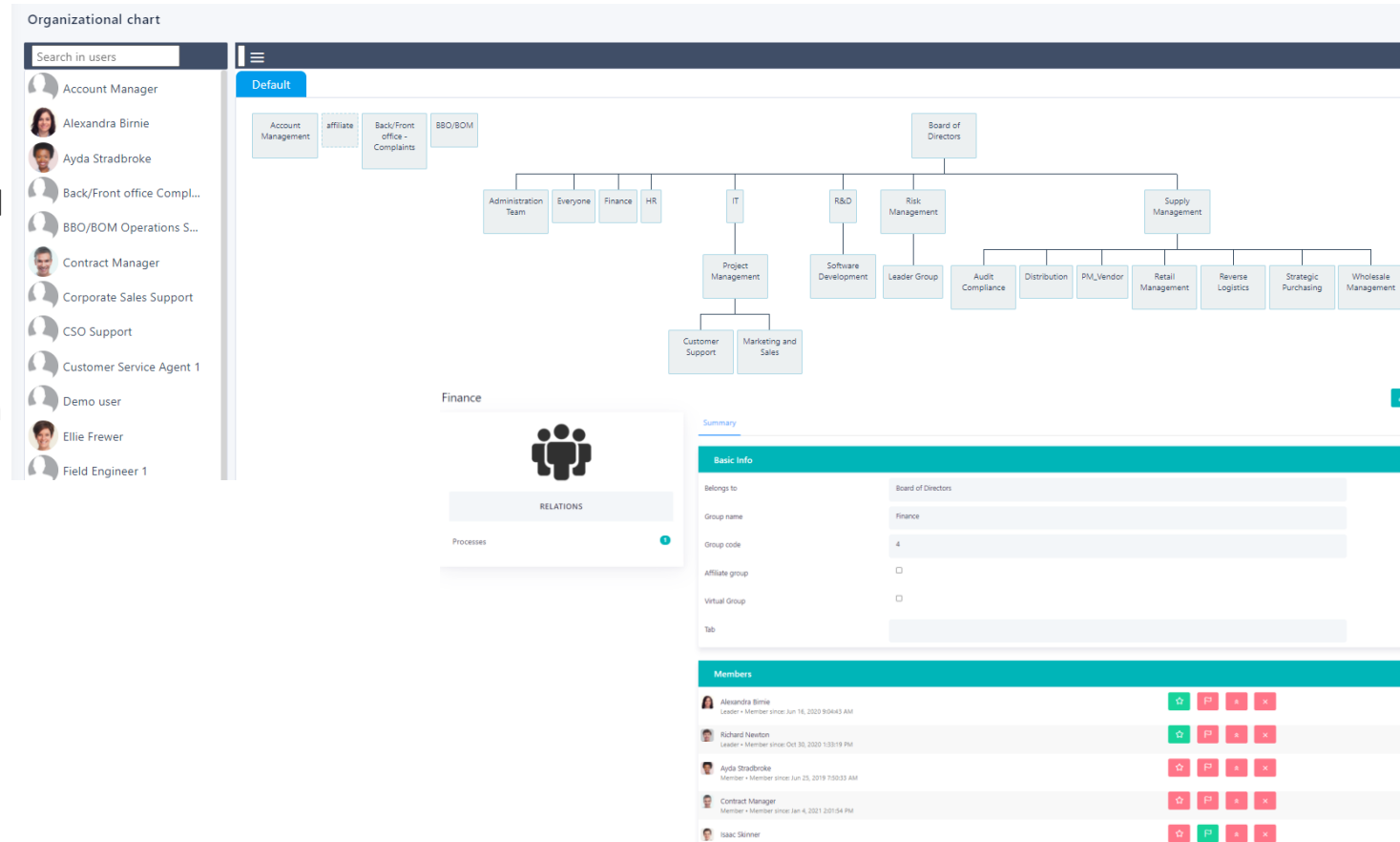
[Find out more here.](#)

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.

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.
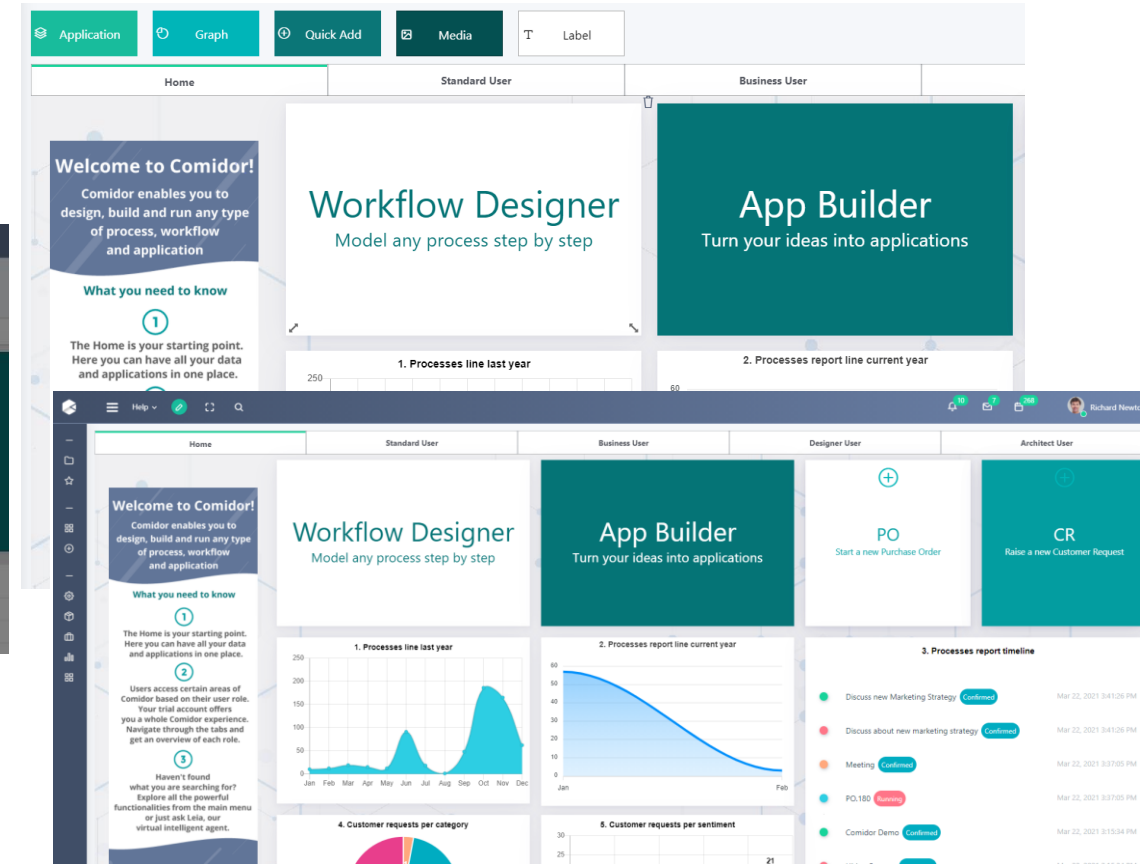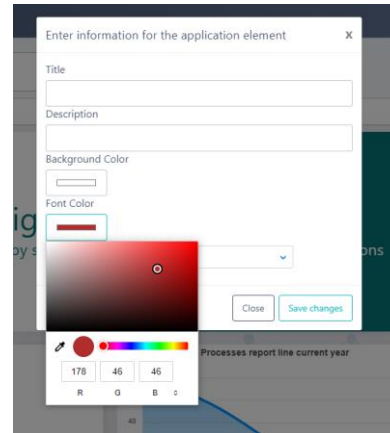
Menu & Notifications

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.
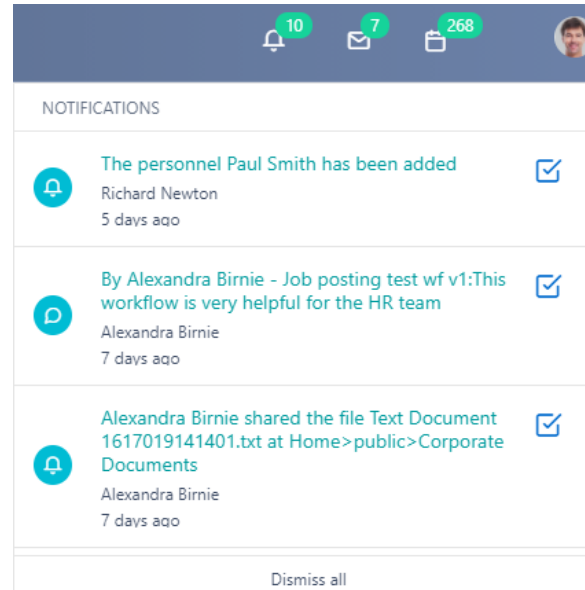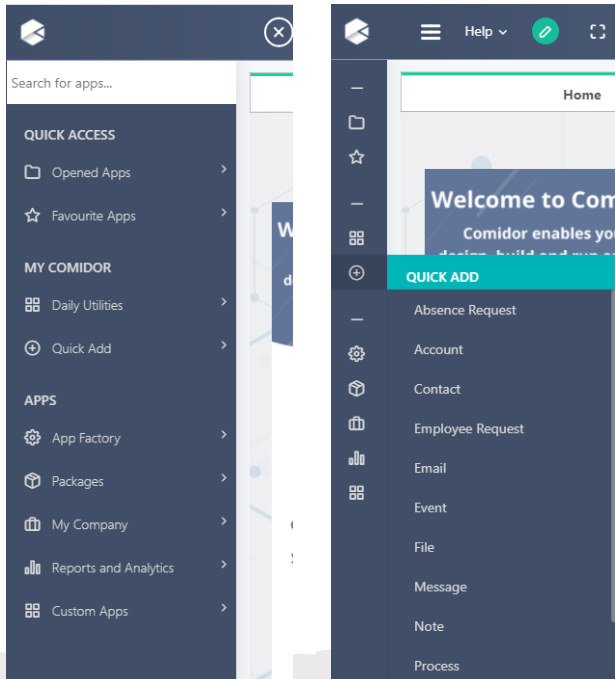

- In the top right of the page is the Notifications Bar. There are three icons and when a new notification is received a blue box will appear next to the relevant icon. The five icons are:

- **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
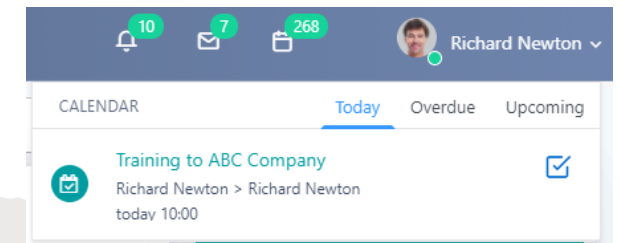
Tasks & Calendar

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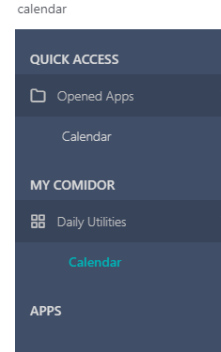
Comidor provides a fully interactive calendar where you can monitor your activities (tasks, meetings, assignments, events, etc.) and orders (assigned tasks) on a daily, weekly or monthly basis.

Find out more here.

Find out more here.

Workflow Designer

With Comidor BPMN 2.0 designer, you can map and optimize any process that takes place in your company.

Workflows fully exploit the organizational structure to provide unprecedented process design and action monitoring. Through Workflows Designer, the user can navigate and modify existing processes or create a new one using BPMN 2.0 with drag-and-drop functionality.

Workflow Components

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Basic Components —

- Task
- Subprocess
- Email
- SMS
- Notification
- Timer
- Inclusive (OR)
- Parallel (AND)
- Exclusive (XOR)
- Annotation
- End

Data Components —

- RESTful Web Service
- Comidor DATA (IUD)
- Shell Command
- File Reader
- Export Data
- Convert data
- Digital Signature
- Document Creator
- Table Extractor
- Excel Processor
- Create graph
- SQL Creator
- Message Queue

RPA Components —

- RPA Caller
- RPA Receiver
- Sentiment Analysis
- Document Analyzer
- Text Classification
- Predictive ML
- Selenium RPA
- Image Classification
- Web Scraper

Create a workflow

Workflow example: New Supply Request

- Separate the pool in different lanes according to which group will perform each task

- Create the 5 tasks with drag and drop functionality

- Decide which of the gateways is appropriate according to the case

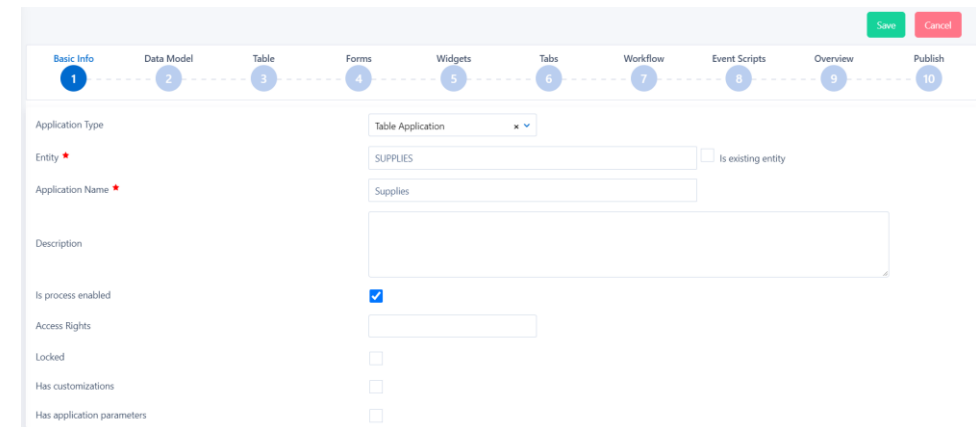- Connect the tasks with the gateways to complete your workflow
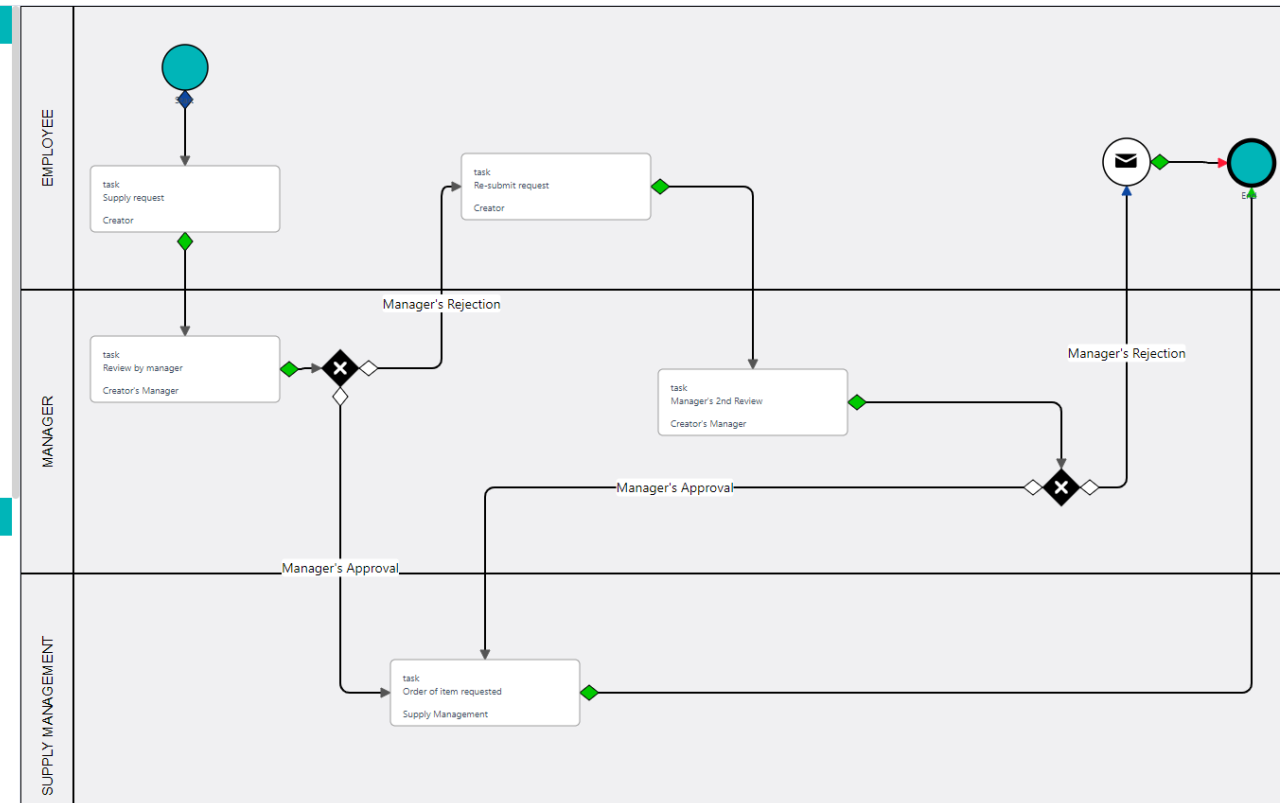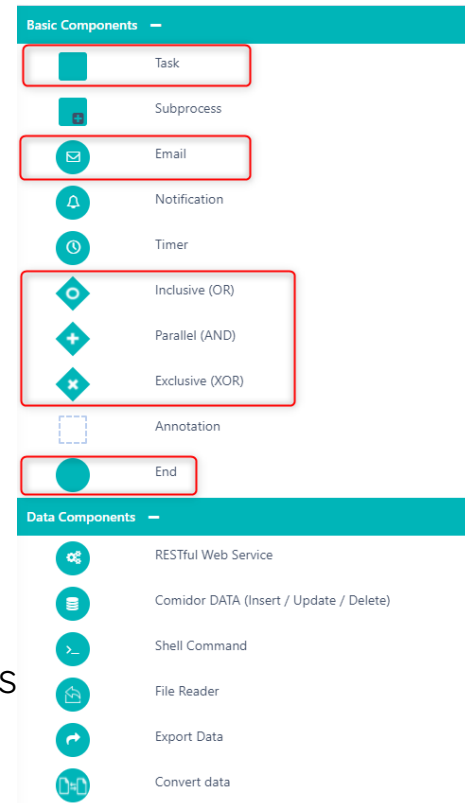
App Builder

Comidor platform offers the ability to build your own apps through **App Builder**, without using coding.

Making simple or more complicated Apps is easier than ever, even for non-developer users.

Comidor guides you with simple steps, in order to publish your idea.

Types of Applications

1. Table applications
    1. Process enabled
    2. Non-process enabled apps (Data driven)
2. Report applications
3. Kanban applications

Create an App

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Step 1. Basic Info

1. Select the **Application Type** (Table/ Report)

2. Start typing a name for the **Entity** you are creating in the database.

3. Give the **Application Name** and **Description**

4. Define whether the App is Process enabled or not. Process enabled apps can be linked with a [Workflow](#).

5. **Access Rights:** determine which users will be able to see the application in the User Apps menu.

6. You can lock your app, so only your user can edit the app.

Application example: Supplies

Create an App

Step 2. Data Model

In the Data Model, you can add all fields that you wish to be used in the App. You can either click on the "+" to create your own custom fields from scratch or import an Excel/CSV file.

- **User fields types:** Text, Memo (Paragraph), Number, Binary File, Drop-down list (Key-Value or Comidor Database lists),Excel, Currency, Checkbox, Date, more.

Note that, if you have selected this app to be process enabled, you can also use in the forms (step 4) all process-related fields. If you left "is Process enabled" unchecked, you can only use the fields displayed in the Data model.

Do not forget to reload the DB after you created all the fields, so that the other users can see them.

Create an App

Step 3. Table

- In step 3, you can determine which columns you wish your App to have in the main table. By default, all fields that were added to the Data Model will be displayed in this table.

- You can add more Columns, by clicking on the "+" icon and selecting the desired field.
  - Note that, if you have selected this app to be process enabled, you can also add process related fields as columns(e.g., date created, creator, stage, etc.)

- Re-arrange the position of each column with drag-n-drop.

- Add label to the column name, set Prefix or Suffix to be displayed before or after the value of each entry, select the preferred alignment and other properties.

Supplies

Summary

Basic Info	Data Model	Table	Forms	Widgets	Tabs	Workflow	Event Scripts	Overview	Publish
✓	✓	3	4	5	6	7	8	9	10

Table Columns

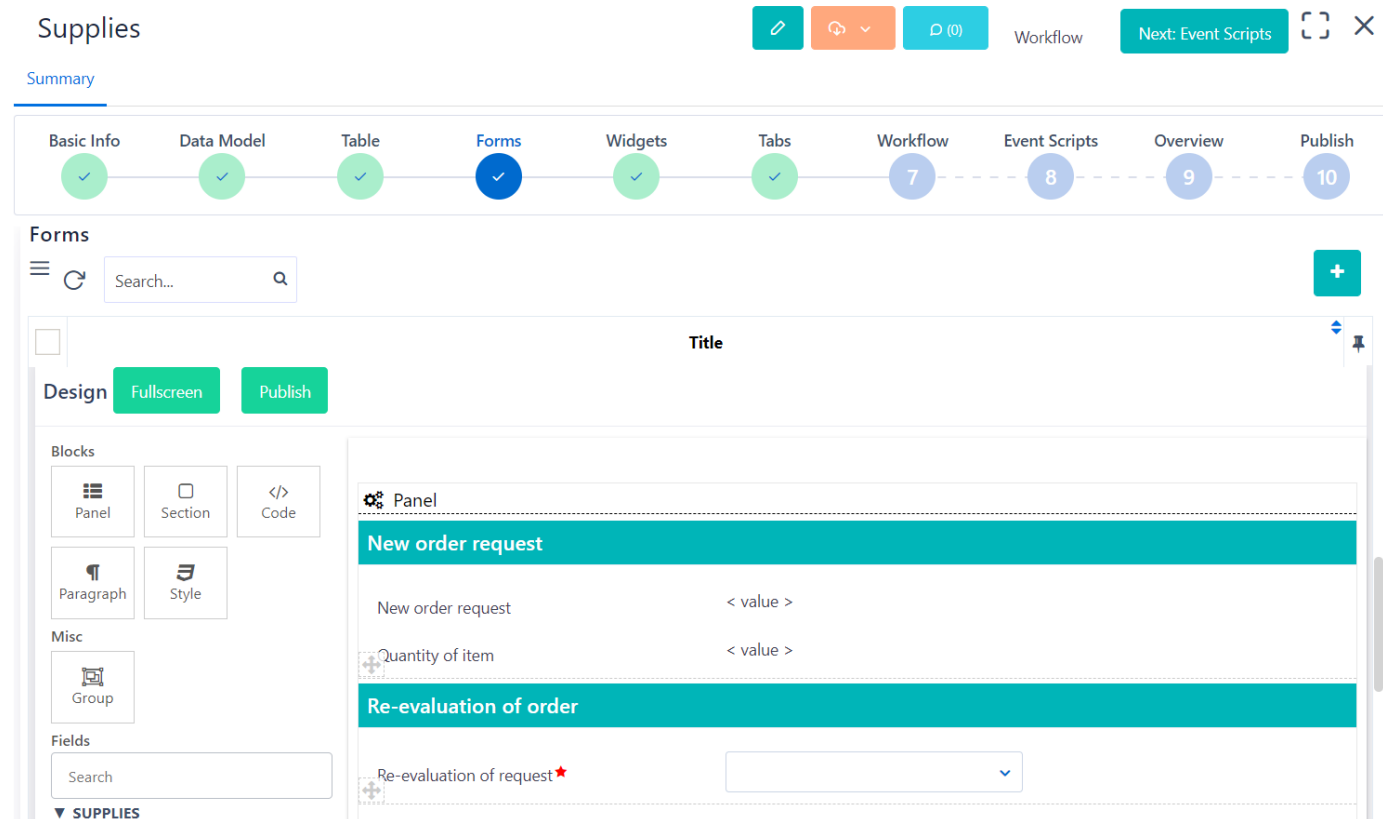| ☐	Position	Label	Column
☐	0		SUPPLIES.PROCESS_ID
☐	3		JP_PROCESSES.STATE
☐	4		JP_PROCESSES.STAGE
☐	5		SUPPLIES.USR_MANAGER_S_REVIEW
☐	6		SUPPLIES.USR_REVIEW_COMMENTS
☐	7		SUPPLIES.USR_RE_EVALUATION_OF_REQUEST
☐	8		SUPPLIES.USR_NEW_ORDER_REQUEST
☐	9		JP_PROCESSES.CREATE_DATETIME

Show 20 entries   Previous 1 Next

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Create an App

Step 4. Forms

- Forms can be used as Main forms in a Process (Workflow-driven or not) or as forms inside the Activities(tasks).
  - Design your form easily, with drag-n-drop of fields, and group them with Sections. Don't forget to Publish your form after finishing your design.
  - Multiple Columns, Paragraphs and Style may be added inside a Form
  - Forms may have its own view and change rights
  - Fields added inside forms may be "read only" or "read/write" per form
  - Fields added inside forms may be mandatory or not
 - Forms may be supported with scripts

Create an App

- **Step 5. Widgets**

- Comidor Widgets are the ideal choice for data visualization. Get the freshest data on a visualization you define.

- Create your own personalized dashboard in seconds.

- Combine multiple views of data to get richer insight.
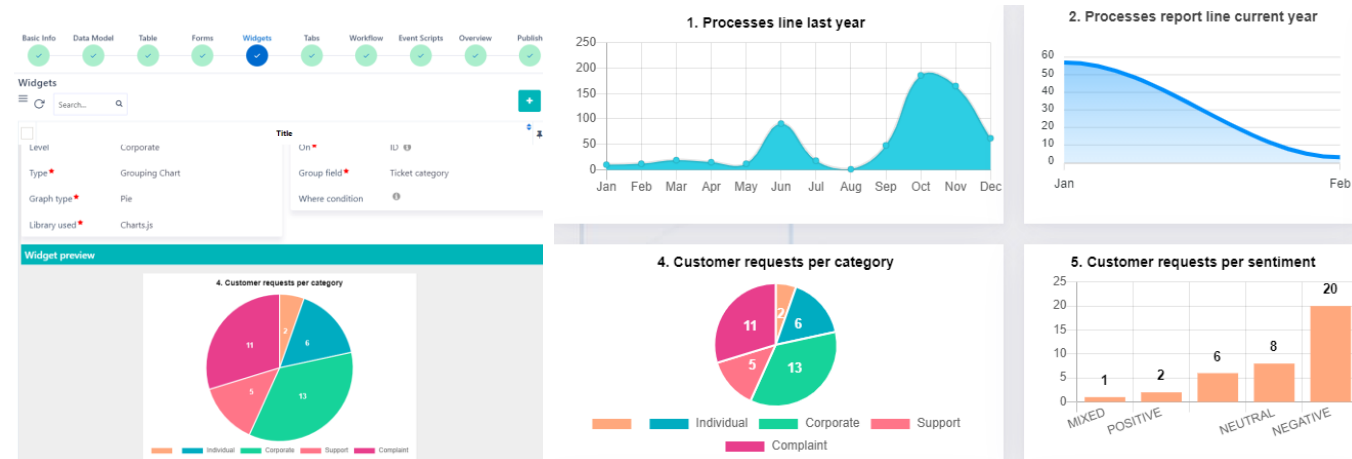
- **Step 6. Tabs**

- Use tabs to have complete control over the accessibility of your application.

- The tabs can appear inside records (as a tab at the left part of the record) or at the summary table of the application.

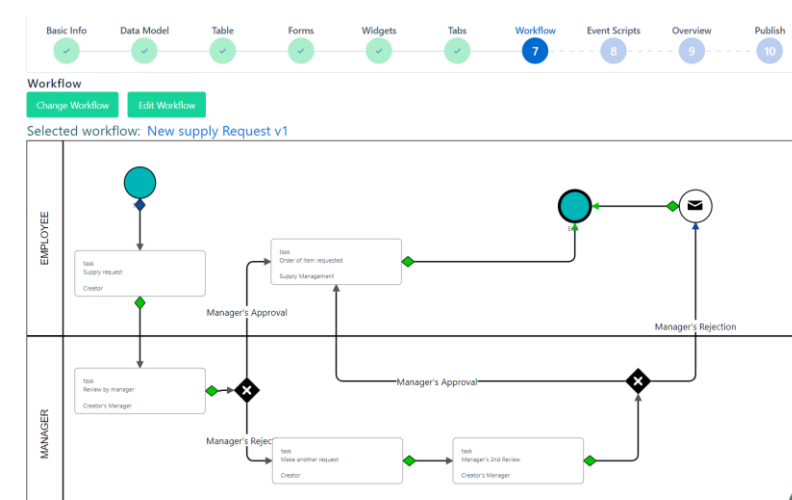- A tab can be a table from any Comidor entity, HTML, or a widget.
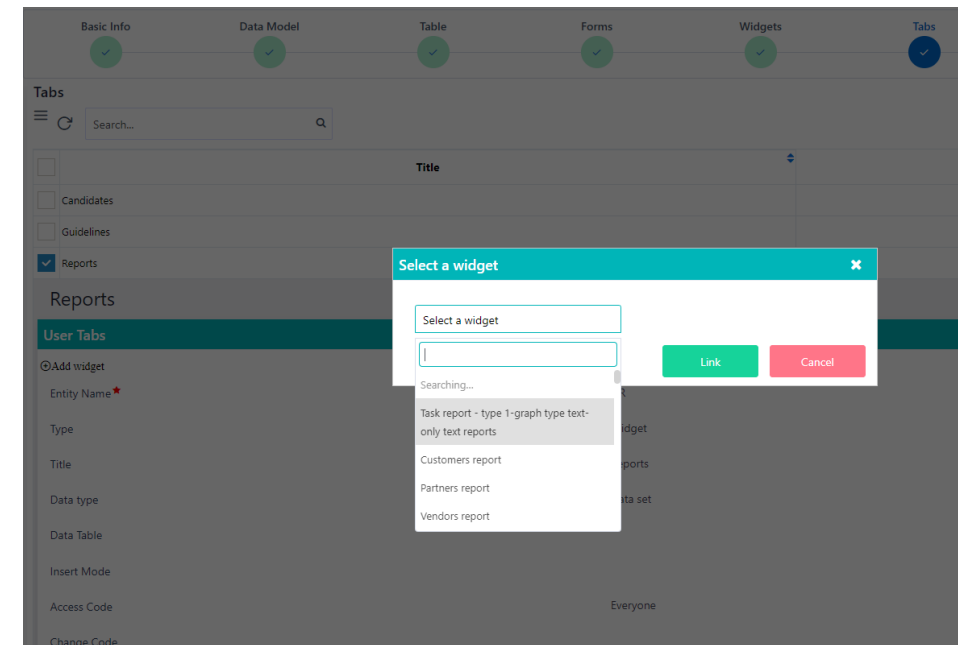
Create an App

- ## Step 7. Workflow

- You can link a workflow to the App at this step. The workflow will be triggered in each entry a user creates in this app. Workflow relates tasks, run diagram, and workflow audit will be visible there too, for the users to get real-time information about the workflow stage.

- Step 7, is only available if you had checked is Process Enabled, in step 1.

- ## Step 8. Event Scripts

- In this step, you can write scripts for a certain Data Type to be executed before/after/on a specific event.

- Choose the **Data Type** (apprec, task, process, dataset) and define where you want the script to be applied

- An Event Type can be inserted, updated, deleted, etc.

- In the **Procedure Body** add your code.
    - This is for advanced users to write their procedures.

Create an App

Step 9. Overview

- In this step, you can make the configuration of the Application.

- Decide if you wish to include from the **Basic options** (Notes, Tags, and Links, create, edit and/ or delete an entry, include print/export options)

- **Customise your data** by

    - setting a Prefix and Suffix, an Incremental Number Field
    - Defining a **Primary Field**
    - Defining to whom each entry is assigned to, send notifications, Admin 1,2, and Supervisor.

- Fully customise the app layout, by selecting font sizes and colors in **CSS Design** options.

- ## Step 10. Publish

- Your app is ready to be used!

The application is now published! Click on the button below to publish changes

Publish Changes

Run your application

All published apps can be access by the main menu> Custom Apps.

- By clicking on the "+" icon you can create a new entry of this app. (In order to see the + icon, you should have checked first the respective option in the Overview step of App builder) A new tab will open with the form that was created in the App Builder. Fill in the fields and click on Save to add this entry.

- If the App is process enabled and linked with a workflow it will have State (Opened, Scheduled, Running, etc.) and some more Tabs in the left-side menu, such as Workflow tasks, attachments, and workflow audit based on the configuration of the App in the App Builder.

- If you have selected the primary form of the app to be also visible in the quick add menu, you can easily initiate this App, from quick add and by clicking on the name of this form.

Other actions:

Users can import/ export/ edit/ delete applications in App builder.

Thank you!