



ADVANTA 2.0

System documentation

How to configure the system Advanta

Part 2. System Architecture

Document Version 1.2. (System version 2.2.2.h)

Advanta allows companies using project management techniques to implement their projects and initiatives well, directing them to the objectives and business strategy.

www.advanta-group.cz

Table of contents

Table of contents	2
Advanta functionality map	4
Principles of constructing solutions	5
Step 1. Object Definition	11
Directory	11
Projects	14
Tasks	15
Discussions	15
Documentation	17
Harmonization	17
Members	18
Overall System	20
Step 2. Creating a business environment	21
Define business environment	21
Description of the business environment	23
How to configure the business environment in the system	25
Step 3. Setting details of objects	26
String	26
Classifier	27
Process	28
Date	29
Yes / no	30
Address	30
File	30
HTML-field	31
Formula	32
Counter	34
Contextual clues	35
Step 4. Setting directories	36
Simple Reference	36
Contact (object reference)	37
Properties directories	38
Bookmarks	51
Step 5. Setting OLAP-cubes	54
Totals	54
Measurements of OLAP-cube	54
Indicators-requests	55

Indicators-formula.....	56
Indicators-Indicator	56
Indicators-increment.....	57
System performance	58
Properties indicators	59
Selecting the type of OLAP-cube date for indicators	61
Step 6. Setting horizontal ties	62
Determination of horizontal connections	62
Connection type Object - Object	62
Connection type Object - Contact	64
Step 7. Final Set objects	65
Object Properties Management.....	65
Setting the properties details.....	68
Parent and child facilities	69
Subsidiaries Reference	70
Creating reports in objects	71
Step 8. Using indexes	72
Defining Indexes.....	72
Working with system performance.....	73
Object Counting.....	74
Counting records directories.....	75
Step 9. General Settings	76
System Settings	76
Setting time tracking	79
Commands available through the "Create" button.....	81
Project Templates	83
Templates approvals	85
Common user reports	86
Customizing Your Control Panel.....	89
Order services for configuring the system	91

Advanta functionality map

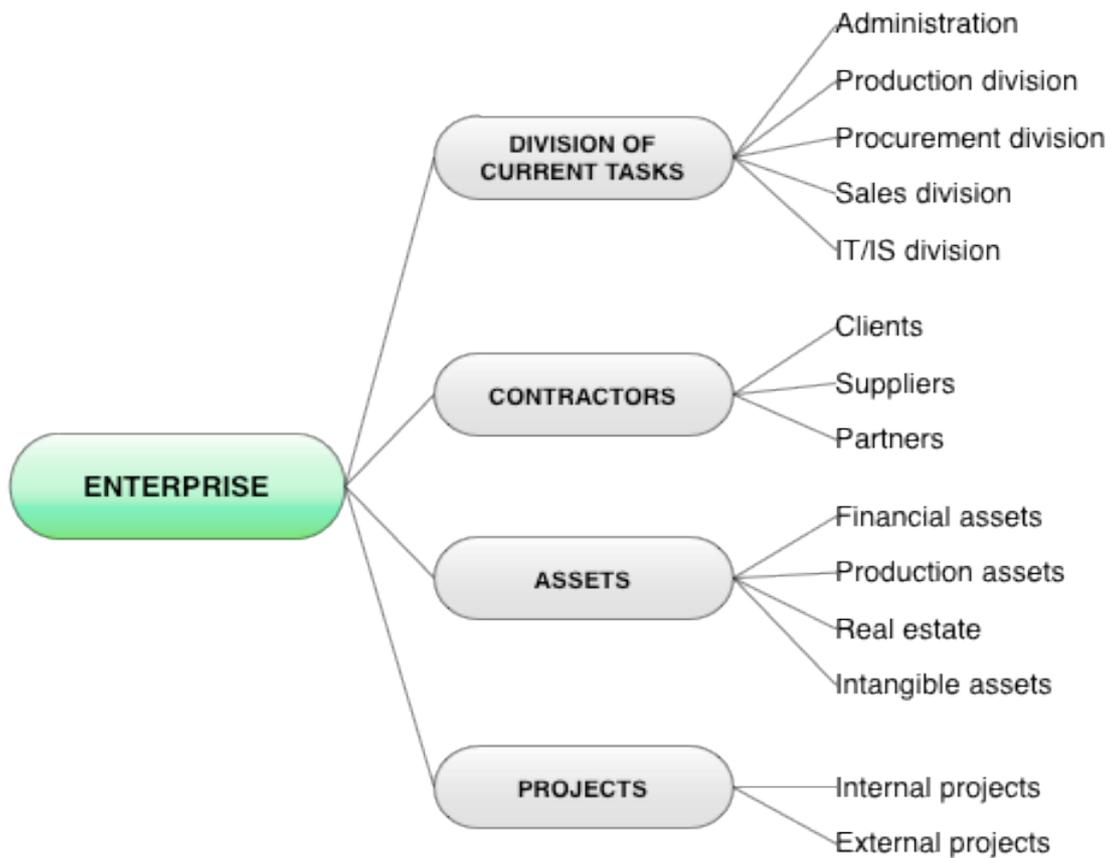
Advanta - online project management system focused on improving the efficiency of the entire organization. The system provides each unit tools for collaboration, and project management tasks, as well as all employees are united under a single corporate communications portal. Advanta system functionality can be divided into the field of automation. General map of the functional areas of the system and their logical sequence of implementation is shown below.



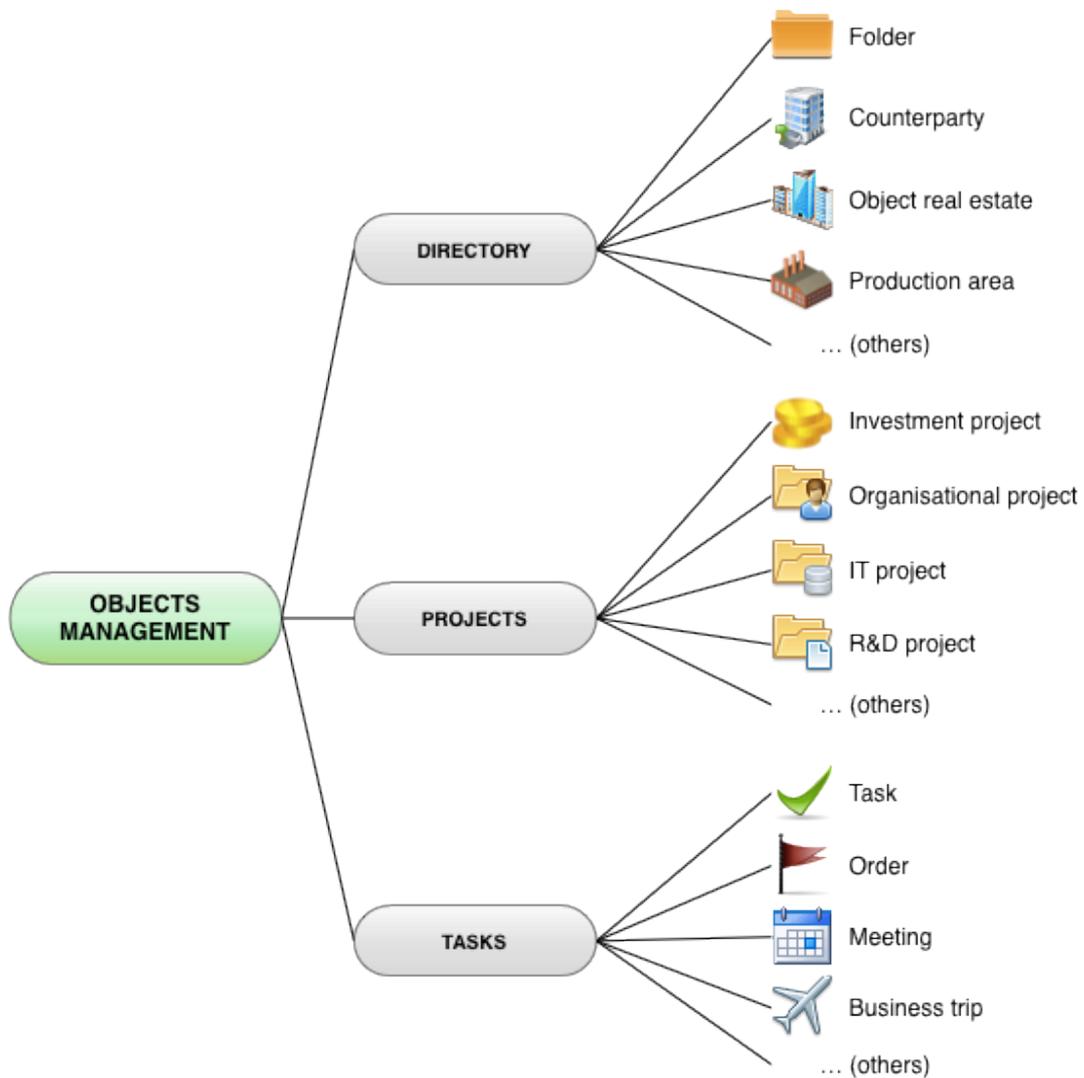
This course describes the basic principles of creating solutions based Advanta system, and is designed for business analysts and project managers, system implementation. The first part provides an overview of architecture, the second - setting up functional areas in accordance with the functional map provided above. The third part describes how to run the system.

Principles of constructing solutions

At the heart of any decision in Advanta are hierarchical structures that form the model object database management. Each structure is responsible for a specific area of solutions.



Hierarchical structures are formed from the control objects. For each object type in the Advanta can create their identity, with its own distinctive icon and the desired properties. Control objects are divided into three groups - directories, projects and tasks.

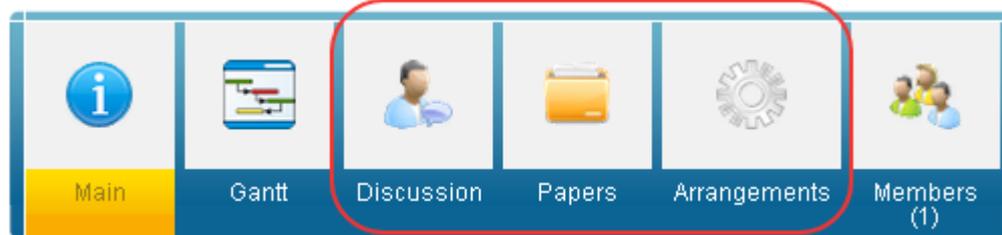


Discussion and agreement documents are objects, but they can exist only in relation to the objects of the hierarchical structure. Together they form a file archive and communications circuit (collaboration tools), tied to the hierarchical structures.

All projects

Development of internal IT systems

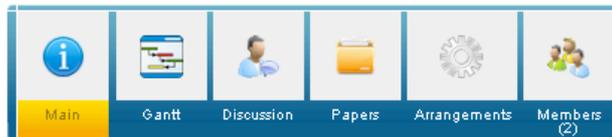
[change](#) [to show responsible](#) [relocate](#) [subscribe](#) [remove](#)



Details form a "passport" facilities management, responsible for the narrative part of the solution.

The planning process

[change](#) [move](#) [remove \(1\)](#) [remove](#)



Head
Jaromir rich man



Executor
Robert Final

Start: **28th 5th 2014** [move to data](#)
Finish: **2nd 6th 2014**
4 Days

Status of implementation 45% Developing
commenced: 29th 5th 2014 [raise priority](#)
[complete](#)

Particulars [save](#) [cancel](#)

Tip of the project * Planning

Production time (days) *

Expected number of parts (units) *

Note to the project *

Expected completion date *

Instead of making *

Directories - The next level of development of solutions; they form the objects associated with the tables required to store related data (resources, finance, procurement, risks, etc.).

All projects / project portfolio

The planning process

change move draw (4) remove change permission to recalculate data

Main Gantt Discussion Papers Arrangements Members (2) **Delivery (3)** add

Delivery [upload from excel](#)

Add

	Author	Tip of the product	The technical name	Customer	Project Number	Material	Delivery Date	Planned delivery date	Place of delivery
	Robert Final	CNC turning	Hfidel03	Bratislava steel manufacturing sro	35	Structural steel	28th 7th 2014	31st 7th 2014	Bratislava
	Robert Final	CNC workpiece	Worm wheel	Agrotrade.pl	321	Stainless steel	6th 3rd 2014	20th 3rd 2014	Warsaw
	Robert Final	CNC workpiece	Camshaft	Auotomotoshop.sh	245	Grey cast iron	7th 2nd 2014	21st 2nd 2014	Amsterdam

OLAP-cubes use data from objects and details of the directories for data representation in the form of analytical reports. At the same performance in OLAP-cubes may be calculated by including custom formulas.

Specify options for filtering

See Figures Resource

Date (year)	Date (month)	Anatoly Yefremov	Alexander Ilyin	Putlov Sergey	Oleg Radovskii	Maxim Sergeev	Smotrin Eugene	Andrei Fedorov	Grand total
2014	February			160	56				216
	March	160		168	168	168			664
	April	104			168	32			304
	May	280	56				32	8	376
	June	96	8				40		144
	July	8							8
	Total: 2014		648	64	328	392	200	72	8

Horizontal communication used in cases where it is necessary to link the objects of the same tree or classify objects of another tree for a more intuitive visualization of the structure of the company's business.

All projects / project portfolio

"Unit-form", OAO

[change the...](#) [draw \(1\)](#)

- Main
- Gantt
- Discussion
- Papers
- Arrangements
- Members (2)



Head
Robert Final

Start: **2nd 6th 2014**
Finish: 2nd 6th 2014
1 days



Executor
Jaromir rich man

Status of implementation: Assumed
[start](#)

Requisites

Counterparty	Customer
Place	Czech Budejovice
Location Map	czech budejovice havlickova
Website	http://www.unitforms.eu
Billing address and phone	Havlickova 480, Czech Budějovice 370 01 Tel: +420 789 789 789
Branch	czech budejovice havlickova
Participation in projects	Comprehensive automated boiler

Support

[upload from excel](#)

Add

Author Robert Final
Act support type: Technical Support

Project

[upload from excel](#)

Add

Author Robert Final
Participation in projects Comprehensive automated boiler

Templates used to accelerate the typical user activities associated with the creation and launch of projects approvals.

[All projects](#) / [Project Portfolio](#) / [Planning process](#)

Tender-TEMPLATE

[change](#) [move](#) [draw \(4\)](#) [remove](#)

Main

Gantt

Discussion

Papers

Arrangements

Members (1)

Head
System administrator
[delegate](#) | [delegate all](#)

Executor
System administrator
[delegate](#) | [delegate all](#)

Start: **30th 5th 2014 0:00** c [move to data](#)

Finish: 30th 5th 2014 to 17:00

1 days

Status of implementation Assumed

[start](#)

Requisites

Subject of the competition

The tender for the management Selections [Create](#)

Budget management Selections

Minutes of the tender commission [Create](#)

Hierarchical structure

[download the excel](#) | [unload in excel](#)

[Add](#)

[detailed view](#)

	Development award	<input type="text" value="0%"/>	Jaromír rich man
	Publication award	<input type="text" value="0%"/>	Jaromír rich man
	Collecting proposals	<input type="text" value="0%"/>	Jaromír rich man
	The meeting of the selection committee	<input type="text" value="0%"/>	Jaromír rich man
	Publication of results	<input type="text" value="0%"/>	Jaromír rich man
	Closing of the tender	<input type="text" value="0%"/>	Jaromír rich man

Step 1. Object Definition

Directory

Directories - objects that in Advanta perform three functions:

- are repositories for other objects, forming a logical hierarchy to reflect the structure of the business. Are essentially folders, directories.
- are contractors - companies with which a business enterprise. For example, clients, contractors, partners, suppliers.
- the assets of the enterprise. For example, it can be a building, equipment, information systems, land, brands, etc.

All projects / project portfolio

OFFICE MANAGEMENT

[change](#) [to show responsible](#) [relocate](#) [subscribe](#) [remove](#)

News

- Outgoing documents
- Incoming documents

Requisites

Document Status

Hierarchical structure

[download the excel](#) | [upload in excel](#)

Add

filter... [show filter](#) [go to bookmark](#) [wrap bookmarks](#) [detailed view](#)

+ Journal of the documentation received	System administrator
+ Journal of outgoing documentation	System administrator
Internal company documents	System administrator
Examples of official documents	System administrator
+ Commands and instructions	System administrator
+ Conference report	System administrator
+ Regulatory documents	System administrator

Sample catalog card

All projects / project portfolio

"Unit-form", OAO

[change](#) [move](#) [draw \(4\)](#) [remove](#)

- Main
- antt
- Discussion
- Papers
- Arrangements
- Members (2)



Head
Robert Final

[delegate](#) | [delegate all](#)

Start: **2nd 6th 2014** [move to data](#)
Finish: 10th 6th 2014
7 days



Executor
Jaromir rich man

[delegate](#) | [delegate all](#)

Status of implementation Assumed
[start](#)

Requisites

Counterparty	Customer
Place	Czech Budejovice
Location Map	czech budejovice havlickova
Website	http://www.unitforms.cu
Billing address and phone	Havlickova 480, Czech Budějovice 370 01 Tel: +420 789 789 789
Branch	czech budejovice havlickova
Participation in projects	Comprehensive automated boiler

Support

[upload from excel](#)

Add

[change](#) [to remove](#)

Author	Robert Final
Act support type:	Technical Support
Meetings	10th 6th 2014

Project

[upload from excel](#)

Add

[change](#) [to remove](#)

Author	Robert Final
Participation in projects	Comprehensive automated boiler
% Performance	

Hierarchical structure

[download the excel](#) | [unload in excel](#)

Add

[detailed view](#)

Project construction workers connect to the process

71% System administrator

Sample counterparty card

All projects / project portfolio

Central Office

[change the](#) [draw \(1\)](#)

Main	Gantt	Discussion (1)	Documents (1)	Arrangements	Members (2)

Head
Robert Final

Start: **7th 5th 2012**
Finish: 7th 5th 2012
1 days

Executor
Jaromir rich man

Status of implementation Assumed
[start](#)

News

[Repair and reconstruction](#)

Requisites

Area No.	430
Technical information	Number of floors: 15 Age of building: 49 years
Reconstruction of the central office	Project start date: August 12, 2014
Address	Palacky hill 8 Praha 15 123 45
Land Area (m2)	1300

Plot

[upload from excel](#)

Add

Author	Robert Final
Land Area (m2)	1300
Material	
Area No.	
Report	

Hierarchical structure

[download the excel](#) | [unload in excel](#)

Add

[detailed view](#)

Reconstruction of the central building	<input type="text" value="0%"/>	System administrator
600 M2 (area of land annexation)	<input type="text" value="0%"/>	System administrator

Sample asset card

Projects

Projects - the main control objects in the system.
Depending on the specifics of the organization, you can usually identify the following types of projects:

- investment project;
- project in the field of information technology (IT);
- organizational development project;
- project to create a new product;
- capital projects;
- R & D project;
- design and survey works;
- project of sale (bargain).

All projects / Capital Construction Department / New Construction

Start of production plants of continuous drilling

change | to move the | sign (12) | to remove | convert

Home | Gantt | Discussions (1) | Documents (7) | Harmonization | Members (2) | Budget (10) | Payment to contractors (5) | Acts (5) | Supplies (2) | Risks (3) | Rating (2) | Status Report | Time management

Head
Oleg Voronov

Performer
Oleg Radovskii

Start as soon as possible: 01.09.2011 | move to date
End: 02/19/2021
19776 hour (s)

Status of implementation: 22% In this paper,
Started 08.10.2007 | raise priority
complete

Consolidated budget

Category	Budget (CZK)
Oleg Voronov	22,200,000
Oleg Radovskii	15,250,000
Oleg Voronov	9,900,000
Oleg Radovskii	5,950,000

Reports
Valuing the project
Settlements with contractors

Details
Type of Project: Repair and reconstruction

Hierarchical structure
upload from excel | unload in excel

Add

Pre-Investment stage: 100% Oleg Radovskii
Perform R & D: 94% Oleg Radovskii
Preparation for construction: 97% Oleg Radovskii
Perform construction: 18% Oleg Radovskii
Release Date: 0% Oleg Radovskii

Feed
in detail | briefly | filter

- Rudnev Stepan changed (a) the status of the project Contracting on Needs Attention 2012, August 5 at 19:33
- Rudnev Stepan changed (a) the status of the project to a tender for the work in 2012, August 5 at 19:33
- Oleg Voronov changed (a) an existing entry in the directory risks in the project transformer substation 2012, July 27 at 02:47
- Oleg Voronov changed (a) an existing entry in the directory risks in the project transformer substation 2012, July 27 at 02:47
- Oleg Voronov changed (a) an existing entry in the directory Risks in Project Feasibility study 2012, July 27 at 02:47
- Radovskii Oleg changed (a) the status of the project power facilities to work in 2012, January 10 at 12:28
- Radovskii Oleg changed (a) the status of the project transformer substation at work in 2012, January 10 at 12:28
- Oleg Voronov changed (a) an existing entry in the directory Deliveries project number 26/0B of 15.07.2011 2011, September 27 at 19:47
- Radovskii Oleg changed (a) the status of the project equipment Options on Needs Attention 2011, September 1 at 16:25
- Radovskii Oleg created (a) a new version of the document Act COP-2 from 30.08.2011 in the project number 27/SMR from 01.07.2011 2011, September 1 at 16:22

show more events

Sample project card

Unlike directories, we present projects start and end dates to within days, as well as the status that defines the current state (in the work is completed, postponed, etc.) and the percentage of completion.

Tasks

Tasks - control objects the lowest level are used for planning and monitoring of user actions.

Unlike projects, precision scheduling of tasks in Advanta possible to minutes, in addition, the task manually or automatically, can be added to custom calendars and to-do lists on the home page.

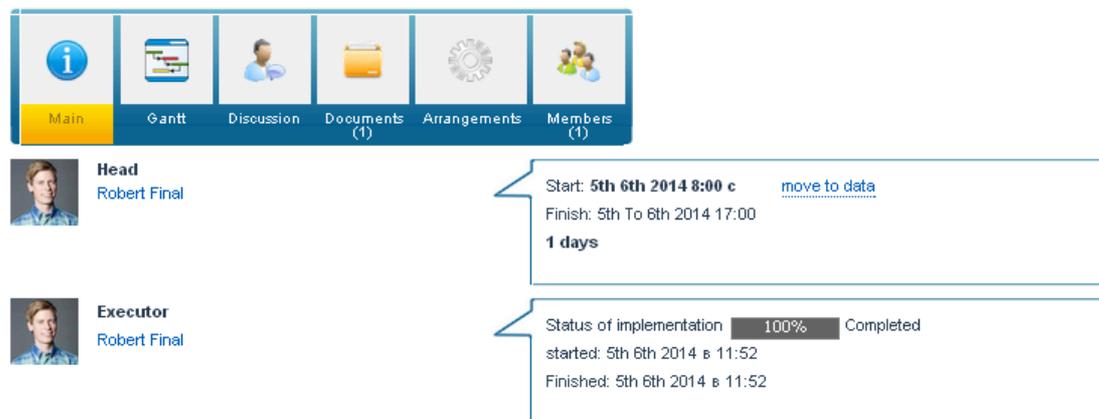
Examples of problems in terminology Advanta will:

- objectives of the projects;
- order;
- milestone projects;
- contracts;
- trips;
- meeting.

All projects / Project portfolio / OFFICE MANAGEMENT / commands and instructions / Department of Economics

Development of TAP customers City Group

[change](#) [move](#) [draw \(2\)](#) [remove](#)



The screenshot shows a software interface with a navigation bar containing icons for Main, Gantt, Discussion, Documents (1), Arrangements, and Members (1). Below the navigation bar, there are two user profiles: 'Head Robert Final' and 'Executor Robert Final'. To the right, a task card is displayed with the following details:

- Start: 5th 6th 2014 8:00 c [move to data](#)
- Finish: 5th To 6th 2014 17:00
- 1 days
- Status of implementation: 100% Completed
- started: 5th 6th 2014 8 11:52
- Finished: 5th 6th 2014 8 11:52

Sample task card

Discussions

Discussion - is a handy tool designed to discuss various issues, as well as documents the project team. Discussions can be created in any property management system, and are placed on the "Discussions" of the object.

In the discussions, there are four essential features to keep in mind when designing solutions:

- targeting - in every discussion, you can invite participants who request the topic of discussion will be on the homepage. As a result of an inquiry into the discussion can not be ignored. Later responders participants can request repeat answers.
- opportunity to discuss the documents through discussion makes them a tool joint development documents.
- opportunity to celebrate (a link button "Like") And answers discussion topic in the debate. Number liked debates and discussions responses displayed next to the icon ("Like") on the control panel's discussion or response. As the number of "likes" appears in the list of discussions in the reports of the discussions.
- based on the discussion in the discussion, you can create tasks, projects and directories. In the debate generated by the object copied values identical details. Following a discussion - not only the means for discussion, but also a handy tool for initiating various procedures related to prior discussion and decision-making.

All projects / Management Development / Business Ideas / Project initiatives / Discussions



Modernization of server equipment

subscribe ← to return to the list of discussions

Invite to discuss

 <p>Andrei Fedorov 26.08.2011 9:21</p> <p>In order to expedite the processing of the data suggest to upgrade the server hardware</p> <p>add files</p> <p>Decision</p> <p> Audit server hardware like</p>	<table border="1"> <tr> <td></td> <td>Anatoly Yetremov was (a) 2011, August 26 at 09:32</td> <td>request response</td> </tr> <tr> <td></td> <td>Putlov Sergey was (a) 2011, August 26 at 09:28</td> <td>request response</td> </tr> <tr> <td></td> <td>Rudnev Stepan</td> <td>cancel question</td> </tr> <tr> <td></td> <td>Andrei Fedorov was (a) 2011, August 26 at 09:23</td> <td>request response</td> </tr> </table>		Anatoly Yetremov was (a) 2011, August 26 at 09:32	request response		Putlov Sergey was (a) 2011, August 26 at 09:28	request response		Rudnev Stepan	cancel question		Andrei Fedorov was (a) 2011, August 26 at 09:23	request response
	Anatoly Yetremov was (a) 2011, August 26 at 09:32	request response											
	Putlov Sergey was (a) 2011, August 26 at 09:28	request response											
	Rudnev Stepan	cancel question											
	Andrei Fedorov was (a) 2011, August 26 at 09:23	request response											
<p>Details</p> <p>Type debate Idea</p>													
 <p>Putlov Sergey 26.08.2011 9:28</p> <p>propose to consider the proposal to conduct an audit of existing server hardware</p> <p>reply add files like</p>													
 <p>Anatoly Yetremov 26.08.2011 9:31</p> <p>agree! task will be included in the work plan next month</p> <p>reply add files like</p>													

Sample discussion

Documentation

Advanta documents can be attached to any object management system (except props discussion), and are available on the "Documents" object. It should be noted that the object of the "Document" in the Advanta is not the document file, and card document that is stored in chronological order version of the document (s).

In this version of the document can be stored in the form

- file saved in the database system;
- link to a document, which is on the FTP-server;
- hyperlink to the document, or any web-page.

Sample documentation

Project	Name	Discussion	Description	Editor	Changed	Document Status
OFFICE MANAGEMENT						
Journal of the documentation received						
2013						
January 2013						
	2013-2	Discuss Agree		System administrator	5th 6th 2014	
	2013 DOC.	Discuss Agree		System administrator	5th 6th 2014	
	2013-01Doc	Agree to talk about the document "2013-01Doc"		System administrator	5th 6th 2014	
February 2013						
March 2013						

Harmonization

Reconciliation - the review process aligner version of the document with the publication of its decision.

The harmonization process in the system Advanta by creating a "matching" - a special type of object that can only exist in relation to the document.

Unlike discussions in approvals has the following features:

- The document may be due as much as necessary approvals, but only one of them can be active.

- Answers in agreeing located under each other, without the possibility of branching. One matcher can be only one answer, with a certain status - "Agree" or "Disagree".
- Reply to this agreement can only at the moment when the matcher receives a request according to the configured route approval. Advanta supports two types of routes - parallel and serial.

All Projects / Construction Management / General repairs and reconstruction / Technical re-assembly lines FINAL / Research and development / project work / Contract 65/PI data from June 15, 2013 / Agreement

Reconciliation Document "Contract 65/PI data from June 15, 2013"

[Close approval](#) / [to change](#) [X to remove the](#) [← return on a list of the](#)
[Add coordinators](#)

User	Time	Reply
 Barták František	1 one hour	10 minutes ago
 Podmokly Libor	1 one hour	
 Stoop Matej	1 one hour	


July 1, 2014 10:24

Contract 65/PI data from June 15, 2013
System administrator June 24, 2014 15:28


July 1, 2014 10:28

Contract 65/PI of June 15, 2013 data is correct please her payment.
 Thank Bartak.

Members

Users - are also subject to the system. Of features associated with users should note the following.

- List the user to generate a list of system resources - values props classifier system "resource" that can be used in different settings.
- The procedures delegation, add members to projects and discussions, as well as the choice of aligner can select only those users whose account is active.

Team list (6)

Skupiny uživatelů ▾

User	E-Mail	Organization	Job Title	Phone
Franc Imrich	franc@mx.cz	Comic	Project manager	+420 765 432 212
Jeronim rich man	bohac@mx.cz	Comic	Main designer	723723723
Ralbit Pavel	kralk@mx.cz	Comic	Project support manager	+420 765 432 212
Macuch Jan	macuch@mx.cu	Comic	Project manager	+420 765 432 212
Robert Final	konecny@mx.cz	Comic	Planner	723723724
System administrator	test@testtesttesttest.com	Not Specified	Not Specified	1

Maximum information for users can be found in "Team Personalities / List". With the "Show details of users", you can add columns such as:

- License;
- date of last login;
- having access to the system;
- other details related to users.

Groups

Advanta group perform several functions.

Groups

- Administration
 - Secretariat
 - Leadership
- IT Support
- Shop
- Project Office
- All users

First, through the group in the system rendered the organizational structure, which is subsequently used to quickly locate the desired user in the procedures of the

delegation, add members to projects and discussions, as well as the choice of aligner. In this group can be layered.

Second, the groups may be associated with systemic security roles, as a result, you can automatically inherit security roles profiles users included in the group.

[All groups](#)

Sales Department

[change](#)
[move group](#)
[delete subgroup](#)
[back to the list of groups](#)

Participants in group		Role of system security	
Add User		Add a subgroup	
Subdivision / FIO	Organization	Job Title	
Barták František	GeneralRepairs	Sales manager	remove
Dudáš Jaromír	Reconstruction of the Central Bohemian Region	Sales manager	remove
Podmoky Libor	BMC sro	Sales manager	remove
Walk Tomáš	Komix sro	Sales manager	remove
System administrator	KOMIX	administrator	remove
Karel Vorel	Komix sro	Director general	remove

Overall System

The whole system - the system object used to create the system directories used in some application solutions.

Examples of such directories are:

- grid tariff rates with employees
- Various factors, such as different weights of parameters for assessing the ranking project
- price lists to calculate the cost of materials
- Currency Rates
- etc.

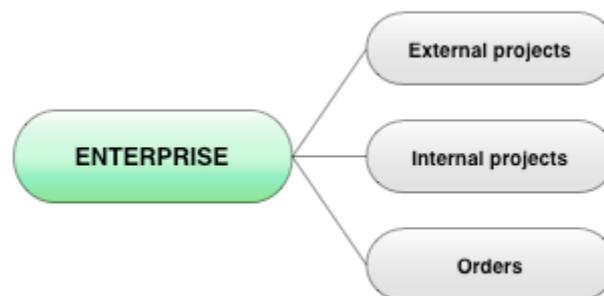
Step 2. Creating a business environment

Define business environment

Business environment - is a set of hierarchies of objects that must be managed in the information system. Business environment is visually displayed on the user's home page, providing quick access to the main sections of the system.

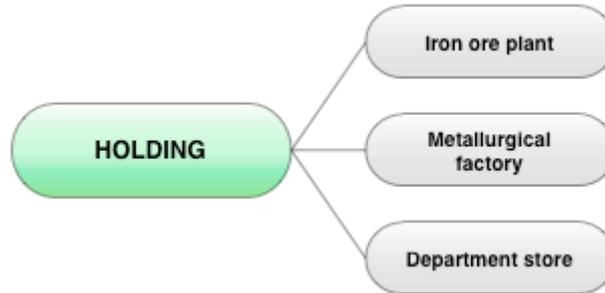
It defines the business environment, to solve the problem would be what the system is intended: or a system for managing a large project capital construction, or corporate project management system for IT department, or a complex system of business management.

From the viewpoint of construction of this structure can realize a variety scheme.



Example of a simple business environment

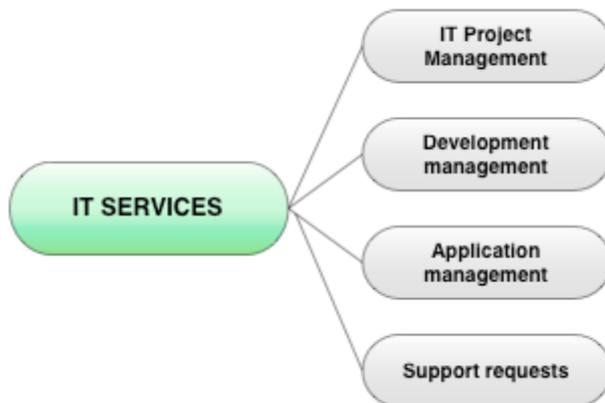
For example, can be built very simple model: external projects - one directory, internal projects - second. Third catalog - orders that are not relate to projects.



Business environment holding structure

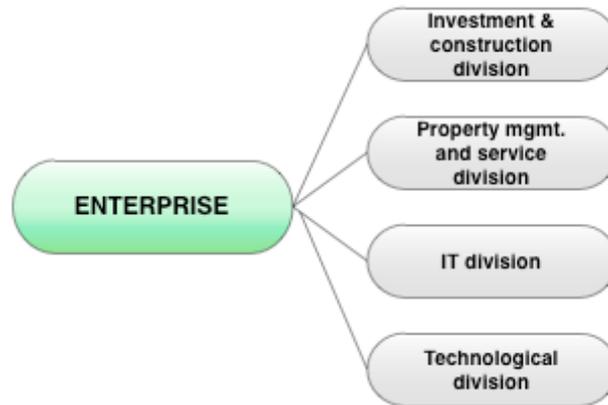
If the system is designed for the holding company, we can make every business a separate directory and is set within the internal structure of management objects.

If implementation of the system is carried out within a single unit, for example, information technology services or capital construction department, then the description of the structure is necessary to move from a functional unit.



Functional structure of the business environment

Another simple way of creating a structure of business environment is a common peg to the organizational structure.



The organizational structure of the business environment

In this case, the system creates divisions and, respectively, by departments subsequently carried by projects and tasks.

Description of the business environment

To build a business environment, we use software products like Mind map. "Digitization of business" is performed in the interview with the head of the company.

In this case, use the following technique: first, you are running a level reflecting the flow of information, ie you can sketch out some general

structure. Next, the head begins to describe it in detail, you ask clarifying questions, get some kind of advanced structure and appears some specifics.

Then, usually through a stage when you like this model is very not like, and do not like it and the head, and he begins to ask questions like: What we're doing is not clear what, let's move on to setting up the system. It

a sign that everything is going right, you just have to get and receive information.

Soon will gradually manifest the final structure. It may seem that this work is completed. In fact, this is only half the work, after which you want to move on to the screening questions.

"Here we are with you digitize your business model" - you fold in the model at all levels up to one - "Your company - this and that, everything is taken into account?". Head said: "Yes."

Then you say, "Expand another level, your company - this and that, everything is taken into account?" As practice shows, in 99% of cases it is missing a very large unit, and moreover, at the head of a desire to "restructure" the result.

Thus, we do a reverse pass on the entire structure, and for each block, revealing at the same distortions, gaps and inconsistencies. This is done until

pore until complete confidence in the correctness of the structure. According to our practice, it takes 2.5-3 hours.

It should be noted that this technique is not strongly dependent on the size of the business, as Director operates as a rule, first and second level, and a maximum

drops to third. Anything deeper it usually does not care because it is not his level of control.

How to configure the business environment in the system

After completion of the development of the business environment in the annex Mind map, the resulting structure you want to play in the system. This is done through the discharge (MS Project, MS Excel) or manually.

After this imaging business environment by comparing icon system root directory business environment. To do this, go to the home page of the root project in edit mode and noted in the "Icon directory" path to an icon. Icon size must be 64x64 pixels.

Portlet "My Places" on the home page of the system is as follows.

Projects

The general structure of [my surroundings](#) [hide](#)



Consultancy department

[FCBU - antifraudã data evaluation](#) [IBM BPM 8.5 launch](#) [PPM methodology for LE](#)



Sales Department

[ADVANTA preparation for the CR](#) [ADVANTA sales](#)



IT support for

[the infrastructure for the operation of cloud resolving](#)
[secure access from the external network](#)



Test Projects

[New Test Project](#) [test applications](#)

Result visualization business environment

Step 3. Setting details of objects

String

Details of the type "string" are divided into four types. Text - text field in plain text. For example:

- description of the project;
- characteristic of the equipment;
- constraints and assumptions;
- etc.

A feature requirements

Save Cancel

Name * e-mail

Description

Type of requirements Line

Group requirements

Existing Contacts

Create new

Type Properties formalities 'Strings'

Maximum length * 2000

Format * Text

The value of unique

Text

URL

E-Mail

Network Folder

A feature requirements

Name *	
Description	

Type of requirements	Number ▼
----------------------	----------

Group requirements

Existing	▼
Create new	

Type Properties formalities 'Number'	
The number of digits before the decimal point *	10
The number of digits after the decimal point *	0
Minimum value	
The maximum value	

Format *	Number ▼ Number Monetary Percentage
----------	--

Classifier

Imprint-classifiers allow to form lists of values to choose from. In this setting these details have the following options.

Allow selection of multiple values - Allows the user to select multiple values.

Hierarchical - Generates a list of values in a tree.

Allow selection of nodal values - If props hierarchical, this option allows to select the node in the hierarchy of values.

Type of the underlying object - Setting data included in the case when it is necessary to create a list of values:

- 1) project - the names of projects within a site;
- 2) document - the document names within a node;
- 3) discussion - discussions of the names of a host;
- 4) user - list of users of the system.

A feature requirements

[Alter](#)

Name * **Taxonomist**

Description

Type of requirements Taxonomist

Group requirements

Existing NO

Create new

Type Properties formalities 'classifier'

Allow selection of multiple values Yes

Hierarchical Yes

Allow selection of nodal values It is not

The basic object

Type the basic object No

The root project hierarchy

Values requirement

[Add](#)

	↑ ↓ ←→	Block	Schedule
	↑ ↓ ←→	Block	Approval
	↑ ↓ ←→	Block	Performance
	↑ ↓ ←→	Block	Executed

Process

Props to the type of "process" in terms of the settings is virtually indistinguishable from the props classifier, but does not provide the ability to create a hierarchical list and make multiple selections. Still, in an object can only add one type of such props.

Visually, this creates props in the project "status bar", which is a phase of the life cycle of the project.

When you add this to the project props, you can make conditional, ie mapping project in the passport other details will depend on the current value of props process. (Refer to Section 7, "Final Adjustment objects", subsection "Setting the properties details"). Also,

whenever you change the value of process, the system also checks fill all mandatory details of the project.

A feature requirements

[Alter](#)

Name * **Electronic Protocol**

Description

Type of requirements Process

Group requirements

Existing meeting protocol

Create new

Objects

[Alter](#)

Name

Project

Values requirement

[Add](#)

			Name
	↑ ↓	Block	Author
	↑ ↓	Block	Question
	↑ ↓	Block	Made
	↑ ↓	Block	Resolved

Date

This type of details used to mark some of the project date. For example, "Date of inclusion of the project in the investment program."

A feature requirements

[Alter](#)

Name * **Meetings**

Description

Type of requirements Date

Group requirements

Existing Contacts

Create new

Objects

[Alter](#)

Name

The list is empty

Directories

[Alter](#)

Name

Support

Yes / no

Logical props, allows you to select or not select. This props must not do, because it will mean a need for mandatory selecting "Yes."

A feature requirements	
Save	Cancel
Name *	It meets all the requirements of the manufacturer?
Description	
Type of requirements	Yes / No
Group requirements	
Existing	Tender
Create new	

Address

This props available to create, if enabled module "Map". Allows you to show on the map.

File

Imprint files allow you to attach the necessary documents directly to the card object. As a rule, these are documents that formalize requirements for the project, as well as relating to the passage of certain checkpoints. For example:

- Project Charter;
- Order appointing a project manager;
- Terms of Reference;
- The contract;
- Assessing the contribution of participants to calculate the premium;
- Etc.

Documents stored via the props are stored in the "Documents" section of the object, like a normal appendix documents in this section.

A feature requirements

Name *	Technical report
Description	
Type of requirements	File

Group requirements

Existing	Tender
Create new	
Allow selection of multiple values	It is not

Objects

Name
Production

HTML-field

Details can display HTML formatted text (font type, size, and other properties, hyperlinks, pictures, dividers, text alignment) of the object on the page and in directories.

A feature requirements

Name *	Internet support
Description	
Type of requirements	HTML ▼

Group requirements

Existing	▼
Create new	

Below shows the display HTML-field on the main project page in edit mode for example props "Project Description."

Website *

Arial 9

http://www.unitforms.eu

Billing address and phone *

České Budějovice
370 01
Tel: +420 789 789 789

Branch *

[czech budejovice havlickova](#)

Participation in projects *

Automatic boiler

Formula

This prop can only exist in relation to a specific directory. Props-formula allows you to add to the directory calculated field generated based on the values of other fields and calculated values based on other criteria previously set formulas.

A feature requirements

Save Cancel

Name * % Performance

Description

Type of requirements Formula

Group requirements

Existing

Create new

After creating props-setting formula props added directories list of fields that form the formula:

A feature requirements

[Alter](#)

Name *

Description

Type of requirements

Group requirements

Existing

Create new

Directories

[Save](#) [Cancel](#)

Assoc.		Name
<input type="checkbox"/>		Schedule of fees
<input type="checkbox"/>		Delivery
<input type="checkbox"/>		Calculation of parameters of evaluation projects
<input type="checkbox"/>		Support
<input type="checkbox"/>		Contacts
<input checked="" type="checkbox"/>		Project
<input type="checkbox"/>		Time Management
<input type="checkbox"/>		Probability of sale
<input type="checkbox"/>		Worksheets
<input type="checkbox"/>		Plot

While maintaining at least one directory appears portlet "Formula" in which the user creates the actual structure of the formula:

A feature requirements

[Alter](#)

Name *

Description

Type of requirements

Group requirements

Existing

Create new

Formula

[Save](#) [Cancel](#)

Elements	Add
/	Add Remove
*	Add Remove
Constant <input type="text" value="100"/>	Add Remove
)	Add Remove

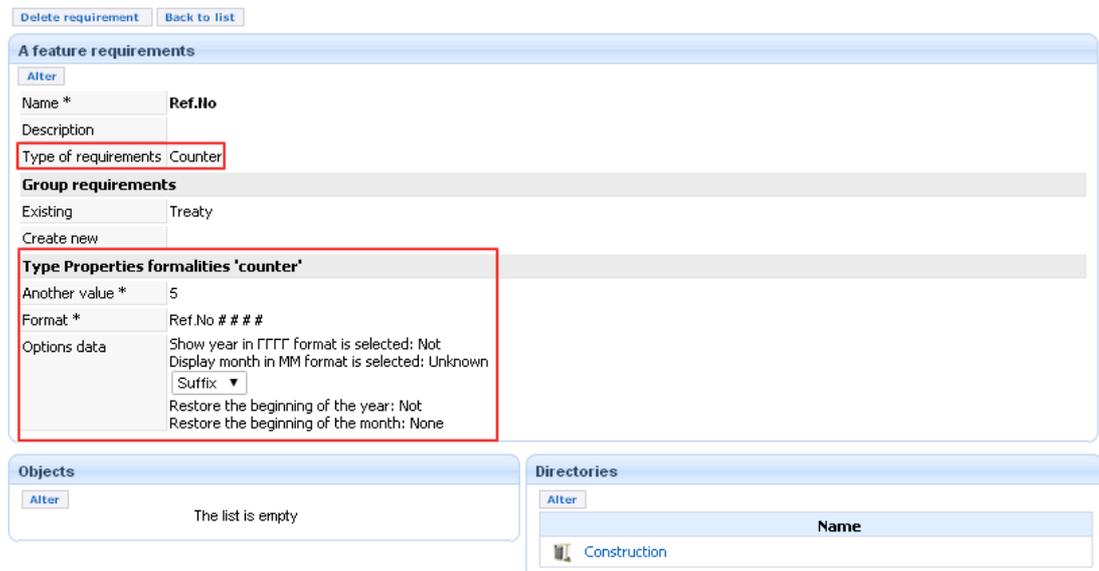
Directories

[Alter](#)

Name
Project

Counter

This prop is used to automatically generate the project number, document or directory entries in a specified format. For example, the numbering of the automatic and / or documents.



A feature requirements

Name * Ref.No
 Description
 Type of requirements: Counter

Group requirements

Existing Treaty
 Create new

Type Properties formalities 'counter'

Another value * 5
 Format * Ref.No ### #
 Options data Show year in YYYY format is selected: Not
 Display month in MM format is selected: Unknown
 Suffix ▼
 Restore the beginning of the year: Not
 Restore the beginning of the month: None

Objects

 The list is empty

Directories

Name
 Construction

Setting props include:

- Format - pattern of arbitrary text pasted into the room,
- Option included in the number of the current year and month,
- Option choice and arrangement of the text - the beginning or at the end,
- Reset option numbers at the beginning of the year and / or month.

After setting up the format and method of forming the counter, this is bound to props project document or the directory in which records should contain the number. Numbering records specified objects sequentially.

Contextual clues

For all types of details in the "Description" field, you can add text to be displayed in the object by clicking the icon next to the question props.

All projects / Manufacturing Project / Starting production procesu_nepře ...

Optimization of the proposed expenditure

[change](#) [move](#) [draw \(4\)](#) [remove](#)

Main	Gantt	Discussion	Papers	Arrangements	Members (1)

Head
System administrator
[delegate](#)

Start: **11th 6th 2014** [move to data](#)
Finish: 11th 6th 2014
1 days

Executor
System administrator
[delegate](#)

Status of implementation Assumed
 [start](#)

Requisites

Description of idea Rescued as many unnecessary expenses and consolidation of financial plans.

Planned start of implementation Opening will take place after the end of the previous process

Planning for Year **Planning for economic efficiency, p. / Year**

Approved by Include the full economic effect of the original ideas

Step 4. Setting directories

Simple Reference

Directories - is associated with the objects of the table needed to store various data. Examples of directories:

- Budget - table for planning the project budget;
- Scheduled payments - table payments to contractors and suppliers;
- Acts - acts table to work for the project;
- Hardware inventory - a table listing the basic equipment with the status of delivery;
- Time management - a table which is fixed cancellation of work on the project;
- Risks - the risk register in assessing the likelihood of the risk and potential damage
- Etc.

Setting directories is done by adding details to the generated directory.

General properties directory

[alter](#)

Name Plot

Description An area designated for construction work.

Use date No

Used in the approval process It is not

Used procedure requirements It is not

Connect with directory objects It is not

Add cut by source It is not

Bookmark icon [modify](#) | [remove](#)

The directory structure

[alter](#)

The structure of directory entries Vertical list

Instead of displaying a list of records The main project

The form of the input record Pop-up window

Requisites

[Add](#)

	Name	Type	Mandatory	AutoSum	Average	Display
Edit Delete ↓	Land Area (m2)	Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Edit Delete ↑ ↓	Material	Line	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Edit Delete ↑ ↓	Area No.	Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Edit Delete ↑	Report	Line	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Parent objects

[Alter](#)

Name	Directory Properties
Project	Viewing and entering data
Production	Viewing and entering data
Central Office	Viewing and entering data

Contact (object reference)

Managing contacts is carried out through Advanta object directory.

The difference is that the props name becomes a separate page that you can associate with the meetings through the mechanism of horizontal connections.

In addition, a link to contacts can contain other directories, such as "History of", "List of participants", etc.

Object, you can create a directory on the page <http://<domain name>/<context name>/Pages/Utils/ObjectDirectory.aspx>. The system can be only one reference type.

Note that in the object directory configured two icons. The first relates to the tab on the page object, the second is displayed at the entrance to a saved contact.

General properties directory

[alter](#)

Name  **Contacts**

Description Reference object

Ability to change the status of tasks It is not

Used in the approval process It is not

Bookmark icon  [modify](#) | [remove](#)

Icon write directory objects  [modify](#) | [remove](#)

The directory structure

[alter](#)

The structure of directory entries Hierarchical

Instead of displaying a list of records On the Address Book tab

The form of the input record Input fiber

Requisites

[Add](#)

		Name	Type	Mandatory	AutoSum	Average	Display
	↓	 Date	Date	<input checked="" type="checkbox"/>			<input type="checkbox"/>
	↑ ↓	 Name	Line	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>
Edit Delete	↑ ↓	 Place	Line	<input type="checkbox"/>			<input checked="" type="checkbox"/>
Edit Delete	↑ ↓	 Phone	Line	<input type="checkbox"/>			<input checked="" type="checkbox"/>
Edit Delete	↑ ↓	 e-mail	HTML	<input type="checkbox"/>			<input checked="" type="checkbox"/>
Edit Delete	↑	 Notes	Line	<input type="checkbox"/>			<input checked="" type="checkbox"/>

Parent objects

[Alter](#)

Name	Directory Properties
 Terms partner	Viewing and entering data

Horizontal continuity

 Contacts and Appointments

Properties directories

Manual page, you can configure the following options.

Ability to change the status tasks - this option adds to the page directory extra column with the status of tasks.

General properties directory

[alter](#)

Name	Risks
Description	Designed for the risk on the project.
Ability to change the status of tasks	Yes
Use date	No
Used in the approval process	It is not
Used procedure requirements	It is not
Connect with directory objects	It is not
Add cut by source	It is not
Bookmark icon	modify remove

As a result, task statuses and the percentage of the change can be seen directly on the manual page.

All projects / Production Project

Starting production processu_nepřetržitá production

[change](#) [move](#) [draw \(4\)](#) [remove](#) [change](#) [permission](#) [to recalculate data](#)

Main

Gantt

Discussion

Papers

Arrangements

Members (1)

Budgetování (9)

Risks (2)

[history request \(0\)](#) [adjust requirements](#) [to upload from excel](#)

Risks

Application for admission

Project	Status	Author	Risk Name	Tip risks	Description of risk	Probability	Measurement of Response	Possible loss (CZK)
Starting production processu_nepřetržitá production	18%							
Pre-Investment phase	100%							
Design Research and Development	14%							
Work on the project	0%							
Tendering procedure	0%							
Treaty	67%							
Review of project	100%							
Preparation of feasibility study	100%							
Privacy, project participants	100%							
		administrator	Choice incorrect supplier	Organized	Inability to supply the material in time, poor quality material	10 /		5 million

Use date - There are several possible options for this:
No - this option is not used.

- 1) Yes, in fact the input - option adds to the list of requisites directory system props "Date", whose value is saved automatically when you save the record book. Value is not editable.
- 2) Yes, manual input - option adds to the list of requisites directory system props "Date", whose value is entered manually by the user.
- 3) Yes, use the estimated date of the project - this option adds to the list of requisites directory system props "Date", whose value is either entered manually by the user (if it is displayed in bold colors), or is taken automatically from the estimated start date or the end of the task / project. Is used to create directories of "Paying calendar." The main goal, which is achieved by this setting - it is an opportunity postponement of projects with automatic recalculation of the timing reference records. As a rule, the payments linked to the stages of the work.

General properties directory

[Save](#) [cancel](#)

Name

List

Ability to change the status of tasks

Use date	Not ▼
Used in the approval process	Not
Used procedure requirements	Yes, when entering
Connect with directory objects	Yes, manual entry
	Yes, the use of computer data project

Add cut by source

Bookmark icon [modify](#) | [remove](#)

Use the approval process - This option includes a mechanism for approval of directory entries.

General properties directory

[Save](#) [cancel](#)

Name:

Description:

Ability to change the status of tasks:

Use date: Yes, manual entry ▼

Used in the approval process: No

Used procedure requirements: Yes, manual entry

Connect with directory objects: Yes, the use of computer data project

Add cut by source:

Bookmark icon: [modify](#) | [remove](#)

As a result of the manual page, an additional column with the status records (for editing / approved) is displayed.

All projects / Production Project

Starting production procesu_nepřetržitá production

[change](#) [move](#) [draw \(4\)](#) [remove](#) [change](#) [permission](#) [to recalculate data](#)

Main | Gantt | Discussion | Papers | Arrangements | Members (1) | **Budgetování (9)** | Risks (1)

Budgetování [upload from excel](#)

Selected entries: Authorize | [Fill](#) | In editing | Approved

Project	Status	Author	Position	Date	Budget (Czech Crowns)	The actual expenditure (Czech Crowns)	Description	Date
Starting production procesu_nepřetržitá production								
Pre-investment phase								
Design Research and Development								
Work on the project								
Work on the project	In editing	System administrator	Editing	25th 8th 2013	730 000	0	The objects	4th 6th 2014
Work on the project	In editing	System administrator	Editing	25th 8th 2013	420000	0	Objects of transport and communication networks and external devices, water supply, sewerage, heat	4th 6th 2014
Tendering procedure								
Treaty								
41/PIR data from March 28, 2014								
The issue of work								
Execution of works	In editing	System administrator	Editing	25th 8th 2013	0	420000	Objects of transport and communication networks and external devices, water supply, sewerage, heat	4th 6th 2014

It should be noted that the status of the recording can also be done by measuring the OLAP-cube.

Use the procedure queries - This option is used to generate mailings to the home user to fill the directories.

General properties directory

[Save](#) [cancel](#)

Name	Bugdet
Description	<div style="border: 1px solid #ccc; height: 60px;"></div>

Ability to change the status of tasks

Use date Yes, manual entry ▼

Used in the approval process

Used procedure requirements

See description in the query object and conditions

Connect with directory objects

Add cut by source

Bookmark icon [modify](#) | [remove](#)

When this option is enabled on the directory tab displays the following controls:

All projects / Production Project

Starting production procesu_nepřetržitá production

[change](#) [move](#) [draw \(4\)](#) [remove](#) [change](#) [permission](#) [to recalculate data](#)

Main
Gantt
Discussion
Papers
Arrangements
Members (1)
Bugdetování (2)
Risk (1)

Bugdetování

[history requirement \(1\)](#) [to adjust the requirements](#) [to upload from excel](#)

[Application for admission](#) Selected entries: Authorize ▼ mi In editing Approved

Page: 1 vs 2 1 2 >

Project	Status	Author	Position	Date	Budget (Czech Crowns)	The actual expenditure (Czech Crowns)	Description	Date
Starting production procesu_nepřetržitá production	Add							
Pre-investment phase	Add							
Design Research and Development	Add							
Work on the project	Add							
	In editing	System administrator	Editing	25th 8th 2013	730 000	0	The objects	4th 6th 2014
	In editing	System administrator	Editing	25th 8th 2013	420000	0	Objects of transport and communication networks and external devices, water supply, sewerage, heat	4th 6th 2014
Tendering procedure	Add							
Treaty	Add							
41/PIR data from March 28, 2014	Add							
The issue of work	Add							
Execution of works	Add							

- Button "Request data entry" - this button opens a form in which a user enters a query text data entry in the directory and destination points, which should fill in the data:

Starting production procesu_nepřetržitá production



Prompted to enter the data directory "Bugdetování"

Send Request [cancel](#)

Font - Size - **B** *I* U **+** **x** **x**

[Add Recipient](#)

[abolish the requirement](#)

After submitting the form, he comes to the homepage destination:

Měkota George create (a) new entry in the directory Bugdetování Project
Launch procesu_nepřetržitá manufacturing production New record: 🤖

minute ago

- Button Link "Saved Searches" is intended to go to a page with the same name, which reflects the list of all previous requests:

All projects / Production Project

Starting production procesu_nepřetržitá production

[change](#) [move](#) [draw \(4\)](#) [remove](#)

[change](#) [permission](#) [to recalculate data](#)



[back to directory](#)

History demands

Asked By	Date of application	Comment demand	Addressees
System administrator	11th 6th 2014	Your Request a book discussion	<input type="radio"/> Měkota George abolish the requirement

- Link button "Configure requests" is necessary to access the settings automatically send queries:

All projects / Production Project

Starting production procesu_nepřetržitá production

change move draw (4) remove change permission to recalculate data

Configuring automatic sending inquiries

Save cancel

Budgetování

Use automatic distribution requirements:

Frequency: Use the data listed in the project:

Period:

Date of commencement of the period:

Closing date period:

Show the query description and details of the object

- This option appears when you turn on the option "Use the procedure requests." When you turn on the data entry page is a directory of information about the purpose / description and details of the object, under the directory where the request originated.

It can be used for the survey of experts in the evaluation of the project to gather information on the status of tasks, etc.

All projects / Project portfolio / OFFICE MANAGEMENT / Internal company documents

Entering the corporate project management system

Colleagues at the instigation of a recent request for a new system of project management, we announced a tender procedure for choosing the new system. The introduction of the new system, you touch it, it will introduce in the coming weekend so that we could start on Monday next training of all persons with access to it.

Colleagues also beg you for one thing and that is backup of all documents attached to the system, particular contracts.

Requisites

Current project status	He's going to system implementation
Comments ekon evaluation, effektivitu	Elimination of errors warehouse, increasing the speed of collection orders, increase motivation.
Date initiatives	2nd 6th 2014
Initiative	Increased speed of delivery
Contribution innovation	technological modernization



Rating innovation

Add

	Author	Meaning (1-4)	Scalability (1-4)	Ease of Implementation (1-4)	The economic effect
	System administrator	4	1	1	220
	Stoop Matej	3	2	1	190

Example of a query with the mapping target, details of the project and fields for entering values in a directory

Assign the object reference - Option adds to the list of requisites directory system props "name" whose value is taken from an existing object directory.

General properties directory

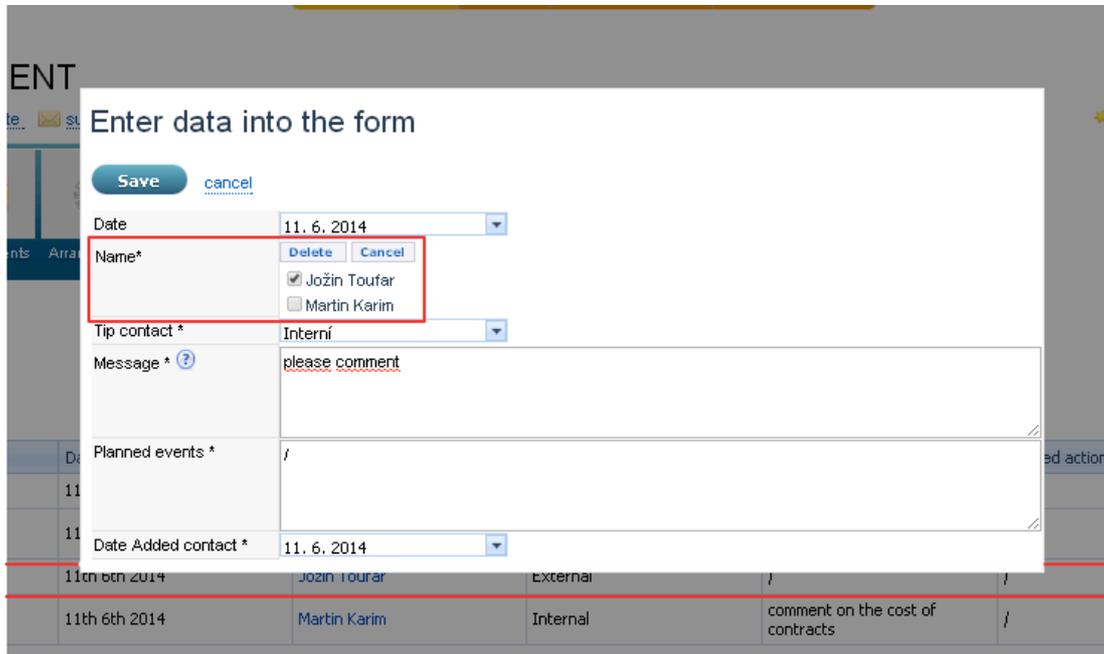
[alter](#)

Name	Employment history
Description	is intended for external storage histories dodvatelů.
Use date	Yes, manual entry
Used in the approval process	It is not
Used procedure requirements	It is not
Connect with directory objects	<input checked="" type="checkbox"/> Yes
Add cut by source	It is not
Bookmark icon	modify remove

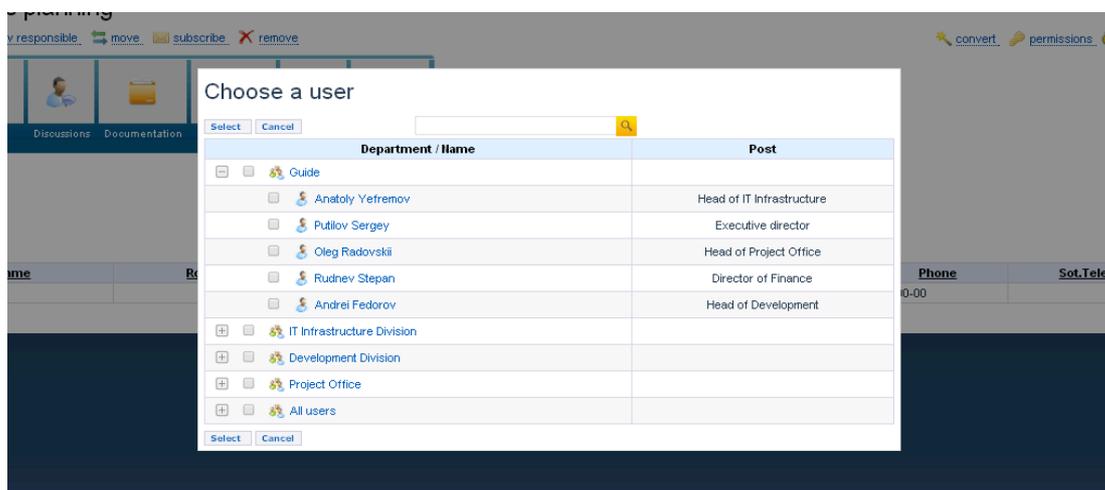
Thus:

- 1) if the object is a directory on the same object, and that created a directory, the last name you can only choose from the number of contacts that are stored

in this object. This mechanism is used for the reference book "History of" activities to reflect on working with a specific client.



1. if the object is in a different directory object in relation to the newly created directory, the last name you can choose from a number of contacts stored in any object. This mechanism is used for the directory "List of participants" contacts to which you want to add cards of arbitrary clients.



Add cut resource - Option adds to the list of requisites directory system props classifier "resource", which is automatically generated from a list of users on the system.

At the same time you create a new record, the system will offer a default executor task or project.

Option is used to configure the application resource management solutions.

General properties directory

[alter](#)

Name	 Clearing time
Description	It is designed to reflect real time data, the means employed in projects etc.
Ability to change the status of tasks	It is not
Use date	Yes, manual entry
Used in the approval process	Yes
Used procedure requirements	It is not
Connect with directory objects	It is not
Add cut by source	Yes
Bookmark icon	 modify remove

The structure of the directory entries - This option enables the display of the hierarchy of subprojects and tasks on the page directory or changes over the display of a vertical to a horizontal list.

Examples of directories with different options "Structure of directory entries."

All projects / project KOMIX

Production of heating equipment

[change](#) [relocate](#) [subscribe](#) [remove](#) [change](#) [permission](#) [to recalculate data](#)

Main
 Gantt
 Discussion
 Papers
 Arrangements
 Members (1)
 Budgetování
 Score
 Risks

Score

[upload from excel](#)

Add

	Author	Parameters ratings	Characteristic parameter for assessing the impact assessment	Estimating the value (1-10), body
	System administrator	Contributing to the development of assets	The project aims to create new capital assets	5
	System administrator	Implementation to estimate Risk	The project has an average level of risk	9
	System administrator	Economic index (ROI)	Economic Indicator Project	7

Horizontal list

All projects / project KOMIX

Production of heating equipment

[change](#) [relocate](#) [subscribe](#) [remove](#)

Main
 Gantt
 Discussion
 Papers
 Arrangements
 Members (1)
 Budgetování
 Ratings (3)
 Risks

Score

Add

Author	System administrator
Parameters ratings	Economic index (ROI)
Characteristic parameter for assessing the impact assessment	Economic Indicator Project
Estimating the value (1-10), body	7
Author	System administrator
Parameters ratings	Implementation to estimate Risk
Characteristic parameter for assessing the impact assessment	The project has an average level of risk
Estimating the value (1-10), body	9
Author	System administrator
Parameters ratings	Contributing to the development of assets
Characteristic parameter for assessing the impact assessment	The project aims to create new capital assets
Estimating the value (1-10), body	5

"Vertical list»

All projects / Production Project

Starting production procesu_nepřetržitá production

[change](#) [move](#) [draw \(4\)](#) [remove](#)

[change](#) [permission](#) [to recalculate data](#)

-
-
-
-
-
-
-
-
-
-

Payments to suppliers

[upload from excel](#)

Project	Author	Date	Budget (Czech Crowns)	The actual expenditure (Czech Crowns)	Description	Contacts	
Starting production procesu_nepřetržitá production	Add						
Pre-investment phase	Add						
Design Research and Development	Add						
Work on the project	Add						
Tendering procedure	Add						
Treaty	Add						
PIR data from March 28, 2014	Add						
		System administrator	12th 6th 2014	150 000	150 000	Payment neúspěšná	FrantišekŽďárský sro
		System administrator	12th 6th 2014	270000	170000	Payment completely transferred	FrantišekŽďárský sro
The issue of work	Add						

"Hierarchical"

Place display a list of records - This option changes the form of the record editing options "tab directory" option in the "On the main project."

When set to "On Main project" directory as follows:

All Projects / Construction Management / New building projects

Setup and assembly production lines kontinuálního drilling

[change](#) [hide responsible](#) [relocate](#) [subscribe](#) [remove](#)

-
-
-
-
-
-
-
-
-
-
-
-

Translate to next stage

1ST OPENING 2ND DEVELOPMENT 3: IMPLEMENTATION 4TH COMPLETION

Head
 Sahula Martin
[revoke the delegation](#)

Executor
 Karel Vorel
[delegate](#) | [delegate all](#)

Budget

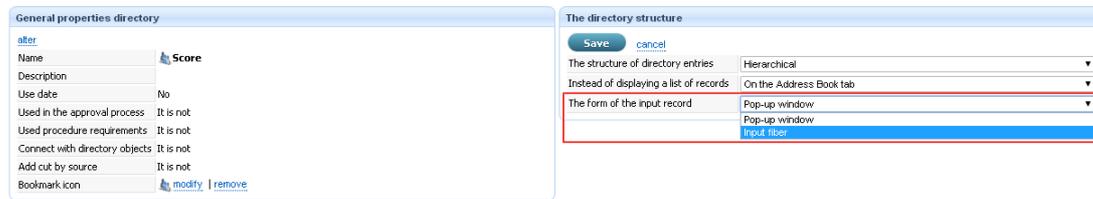
[upload from excel](#)

[Add](#)

	Author	Executor	Date	The planned budget (CZK)	The actual budget (CZK)	Note
	Stoop Matej	Barták František	1st 7th 2014	0	10 000	Broken window
	Stoop Matej	Barták František	4th 6th 2014	0	155000	Material
	Stoop Matej	Barták František	12th 6th 2014	0	280000	Material
	Stoop Matej	Barták František	1st 7th 2014	150 000	0	Other services
	Stoop Matej	Barták František	1st 7th 2014	15 000	0	Protective equipment
	Stoop Matej	Barták František	27th 6th 2014	250 000	0	Material

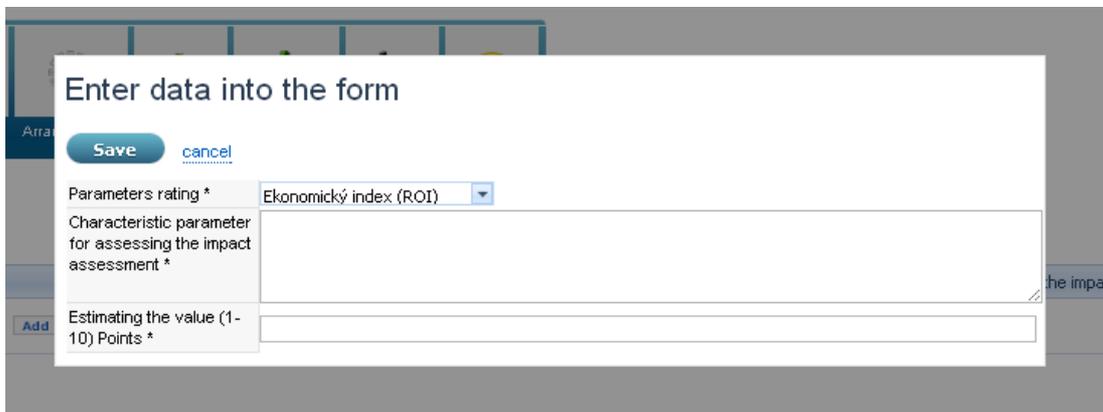
Also, when setting the value "At Home Project" option "Structure of directory entries" is automatically set to "horizontal list." I.e. a hierarchical view of the directory on the main project page can not be displayed. But you can change the property to "vertical list".

Form input record - This option changes the form of the record editing options "popup" option in the "Input Line."



Among the important features should be noted that the embodiment modify "string" will not work requisites classifier multiple choices.

Type of input records through popup:



Type input line entry:

All projects / Production Project

Starting production procesu_nepřetržitá production

change move draw (4) remove

change permission to recalculate data

Score

[upload from excel](#)

Add

Author	Parameters ratings	Characteristic parameter for assessing the impact assessment	Estimating the value (1-10), body	
System administrator	System administrator	Contributing to the development of assets	Contributing to development assets	7
System administrator	System administrator	Implementation to estimate Risk	Implementation of the average Risk	9
System administrator	System administrator	Economic Index: (ROI)	Indicator of economic projects	8

Name	Viewing and entering data	Description
Assets		
Budget		
Delivery		
The history of business calls		is intended for external storage histories dodvatelů.
Contacts		Reference object
Plot		An area designated for construction work.
Planned costs		
Planned income		
Payment		
Payments dodvatelům		
Probability of sale		
Project		
Risks		possible risks and their percentage calculation
Schedule of fees		Fees subject to all work on the project
Actual revenue		
Time Management		
Worksheets		
Calculation of parameters of evaluation projects		
Support		
Clearing time		It is designed to reflect real time data, the means employed in projects etc.

Author	Planned expenditures (CZK)	Actual expenses (CZK)	Date
System administrator	200	0	20th 6th 2014 2:00:00
System administrator	0	200	28th 6th 2014 2:00:00
System administrator	0	150	20th 5th 2014 2:00:00

Bookmarks

For a more compact arrangement of directories in the draft they can be combined and represented by a tab.

To do this on the settings page directories in the portlet "Bookmarks" is created with the same name the essence:

General Settings | Object Properties | The database structure | Additional services | Security Management

Directories

Add

Name	Viewing and entering data	Description
Budget		
Delivery		
Contacts		Reference object.
Plot		An area designated for construction work.
Payments dodvatelům		
Employment history		is intended for external storage histories dodvateli.
Probability of sale		
Project		
Risks		possible risks and their percentage calculation
Schedule of fees		Fees subject to all work on the project
Time Management		
Worksheets		
Calculation of parameters of evaluation projects		
Support		
Clearing time		It is designed to reflect real time data, the means employed in projects etc.

Bookmark

Add

Name	Description
Finance	

If the portlet click "Add" button or enter a hyperlink to a bookmark that you created earlier, then the page will open settings tab - edit the title, description, and icon list of directories to be included in the tab:

Bookmark "Finance"

Save [cancel](#)

Name

Description

Icon  [modify](#) | [remove](#)

Subordinated manuals

Save [Cancel](#)

Assoc.	Name
<input checked="" type="checkbox"/>	 Schedule of fees
<input type="checkbox"/>	 Delivery
<input type="checkbox"/>	 Employment history
<input checked="" type="checkbox"/>	 Calculation of parameters of evaluation projects
<input type="checkbox"/>	 Support
<input type="checkbox"/>	 Contacts
<input type="checkbox"/>	 Project
<input checked="" type="checkbox"/>	 Risks
<input type="checkbox"/>	 Time Management
<input checked="" type="checkbox"/>	 Probability of sale
<input type="checkbox"/>	 Clearing time
<input type="checkbox"/>	 Worksheets
<input type="checkbox"/>	 Plot
<input checked="" type="checkbox"/>	 Budget
<input type="checkbox"/>	 Payments dodvatelům

Step 5. Setting OLAP-cubes

Totals

OLAP-cube - Advanta is an analytical tool for creating tabular and graphical reports with the ability to "slice" of data from various measurements.

When you configure OLAP-cube need to adjust its dimensions and form a set of indicators that should be calculated and displayed in the report.

Vlastnosti templates OLAP-cube

Alter

Name: Transaction

Description:

Icon: [modify](#) | [remove](#)

The number of digits after the decimal point: 0

Measurement

Create

Name	Description
Alternative Project	Classifier requirements «Alternative product»
Data	Date
Selling price of the shaft	Classifier requirements «Optimalizovateľná aktivita»
The source of the transaction	Resources

Indicators

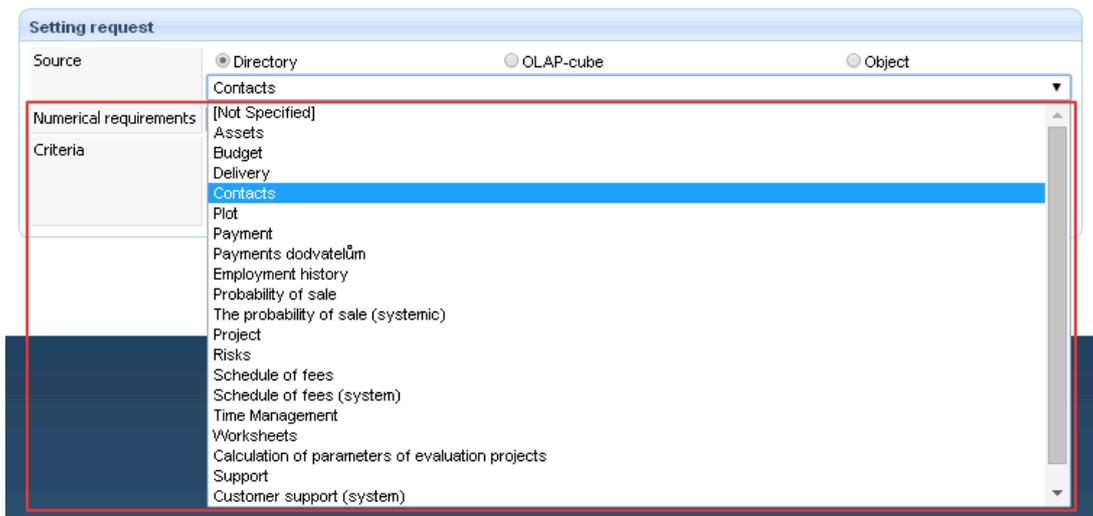
Create

Name	Source	Features
Amount	Formula: 1	
Shop	Folder: Shop Numerical requirements: Index Criteria:	Aggregation
Probability of sale	Folder: Probability of sale Numerical requirements: Probability of sales, % Criteria:	Hidden

Measurements of OLAP-cube

When you configure the measurements need to be borne in mind.

- **Measurement-date** always created if OLAP-cube need to make the cut in time. It should also be carefully created, if the directory has a system prop-date.
- **Measurement details classifier** created for all classifiers present in the directory or in the object (depending on the type of request - from the directory or from the object).
- **Measurement "Resource"** created in the directory if enabled "Add to cut resources", ie classifier system has "Resource".
- **Measuring the "Status"** created when the directory included the approval process, ie there classifier system "Status".



- Measurement for directories for props classifier object is not created in the OLAP-cube, and the object on the page.

Properties objekta

after

Name

Description

Object Type

View initiator

Auto fill labor costs

Check for identical objects

Contact with the process

Icon

Requisites

Add

	Name	Type	Mandatory	AutoSum	Average	Display	Measurement	Follow	Suspended	Condition
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	<input type="text" value="Tip of the project"/>	Taxonomist	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Determine"/>
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	<input type="text" value="Production time (days)"/>	Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	<input type="text" value="Expected number of parts (ks)"/>	Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	<input type="text" value="Project Notes"/>	Line	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	<input type="text" value="Expected completion date"/>	Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	<input type="text" value="Instead of making"/>	Taxonomist	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	<input type="text" value="Electronic Protocol"/>	Taxonomist	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Indicators-requests

Indicators requests - is the main type of indicators that fall into the OLAP-cube by collecting from the following three sources.

- 1) From the directories you can collect any numerical information - watches, cost, etc.
- 2) From other OLAP-cubes can be assembled ready indicators necessary for calculations in the generated OLAP-cube.

3) From the objects can also request numerical information - usually the cost of projects and targets (eg, "Space object of construction").

Indicators-formula

Indicators formulas allow you to customize various formulas that use other types of indicators. For example, you can calculate the percentage of the development budget, the implementation rate of the object, the average cost of per unit area of the object or component of the premium the employee's salary.

One of the interesting features of Advanta, that should be noted is, that the result of dividing by zero gives zero.

Indicators-Indicator

Indicator of the "indicator" is used for visual display in OLAP-report graphic indicators of different colors corresponding to a digital value of other indicators.

			Grand total					
			Significance	Scalability	Easy to implement	Rating	Rating	
<input type="checkbox"/> Innovative proposals <input type="checkbox"/> Archive innovative proposals <input type="checkbox"/> New innovative proposals		Build a car parts plant	11	5		5	21	
		Acquisition of corporate card to visit the gym	8	7		7	22	
		Implement a corporate project management system	8	6		7	21	
		Issue storekeepers Tablets for the treatment of goods	8	5		5	18	
		Open a new branch in Vladivostok	16	13		10	39	
		Offered to pay bonuses for projects all project participants	9	5		10	24	
		Create a corporate website	6	13		7	26	

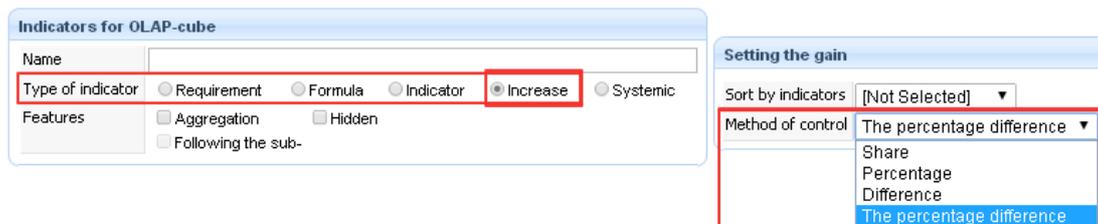
Setting up this type of indicator is the installation type indicator "LED" and the formation of a specific color matching indicator arithmetic or logical expression, similar to (but without logic) construction index type "Formula":

Indicators-increment

Indicator of the "increment" is used to indicate the relative difference of the selected value index for measuring individual segments (cut). For example, the relative change in the plan budget for different time periods (year, quarter, month, day).

2012	2013				2014
December	July	September	October	November	April
0	700,000	-46,300,000	120 700 000	54700000	0

In the settings selected index actually indicator itself (whose values for different segments of the measurements are compared to each other) and the method of comparison - simply the ratio of values to each other or the ratio of the difference to the values of the first parameter.



System performance

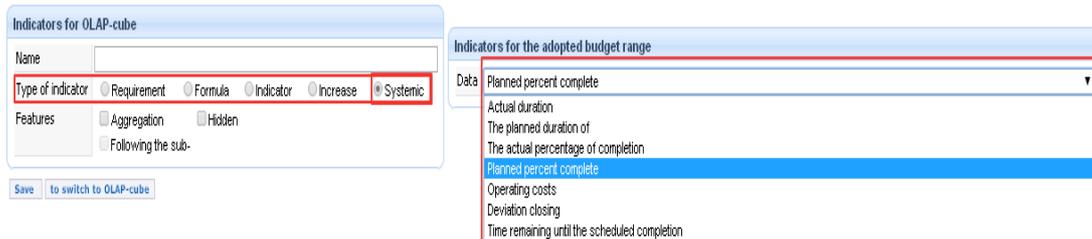
System indicators collect information associated with the timing of tasks and projects, with their percentage of execution and effort.

It is important to know that the data collection is necessary to use performance indices described in the chapter "Step 8. Uses Indexes". Otherwise, these indicators are not collected, except for the indicator "Work" - it is going and without indexes.

You can configure the following system characteristics:

- **Actual duration** - Shows how long it lasts task / project from the beginning to the current date, if it is not signed, or until completion.
- **Planned duration of the** - Shows the planned duration of task / project.
- **The actual percentage of completion** - Shows the actual percentage of the task / project.
- **Planned percent complete** - Shows what percentage of the project should be the task / project if he did not have problems of delays.
- **Effort** - Shows the planned work on a task / project (more labor input is written in the description of application solution "Resource Management").

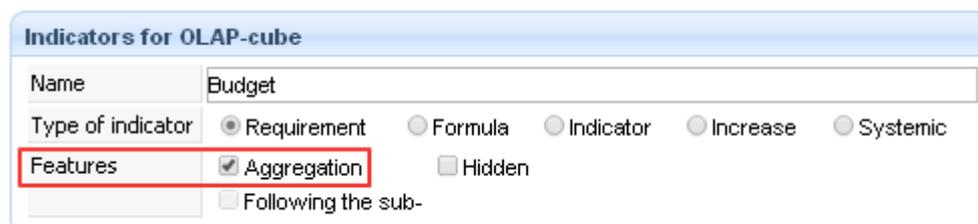
- **Deviation closure** - Shows the time delay for overdue tasks. Value is negative if the task is done ahead of time.
- **Time before the planned completion** - Shows how much time is left before the planned completion of the task. Value is negative if the task is overdue. If the task is done, then the value is missing.



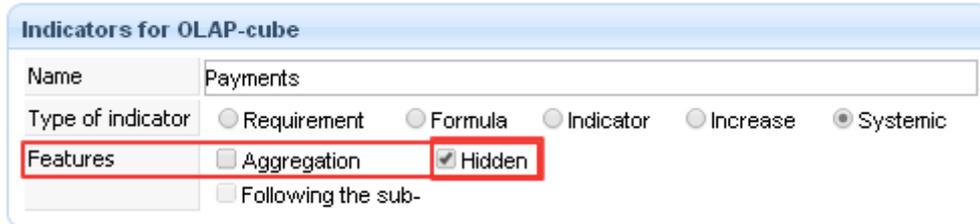
Properties indicators

Aggregation - Effect of this option depends on the exponent:

- For indicators aggregation queries performs summation totals for selected measurements and project hierarchy.
- Formulas for indicators aggregation changes the method of calculating the formula for the combined total. For example, is an indicator of a formula, which is considered as $C = A \times B$:
 - if aggregation is disabled, the combined total for C is considered as an indicator $\sum Si$ where i - row of the report.
 - if aggregation is enabled, the consolidated result for the index C is considered as $\sum Ai \times \sum Vi$ where i - row of the report.

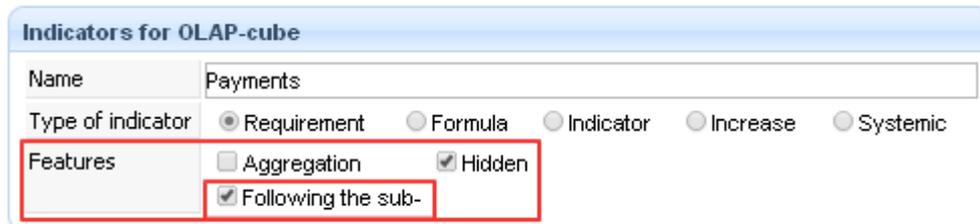


Hidden - If this option is enabled, for the report, this indicator will be hidden by default. It is used to support the indicators used for interim reports.



Indicators for OLAP-cube	
Name	Payments
Type of indicator	<input type="radio"/> Requirement <input type="radio"/> Formula <input type="radio"/> Indicator <input type="radio"/> Increase <input checked="" type="radio"/> Systemic
Features	<input type="checkbox"/> Aggregation <input checked="" type="checkbox"/> Hidden
	<input type="checkbox"/> Following the sub-

Inherit subprojects - This option inherits the value of the index on the child objects of the tree hierarchy.



Indicators for OLAP-cube	
Name	Payments
Type of indicator	<input checked="" type="radio"/> Requirement <input type="radio"/> Formula <input type="radio"/> Indicator <input type="radio"/> Increase <input type="radio"/> Systemic
Features	<input type="checkbox"/> Aggregation <input checked="" type="checkbox"/> Hidden
	<input checked="" type="checkbox"/> Following the sub-

For example, it can help to make these calculations:

- calculate the average cost of construction (handbook Budget, which is filled in the problem project) per 1 square meter area of the object (props of the "area of the facility"). In order to calculate this indicator, created indicator "Object Area", which is inherited by the project objectives.
- calculate the premium of the project participants, provided that their rates are for each individual project. Bids are given in a special directory of the project, and then their values are inherited to the problem, allowing them to multiply the planned or actual work.

Sample report built with this option is shown in the figure below.

Specify options for filtering

See Figures Date (year) Date (month)

Resource	2013												2014										
	January	February	March	April	May	June	July	August	September	October	November	December	January	February	March	April	May	June	July	August	September	October	November
Oleg Voronov			8			48	216	560	992	4 280	10 600	7 672	1 136	672	192	56							
Valentina nails Sergeevna													48										
Gromov Arkady Petrovich													24	48									
Zharov Sergey Leonidovich			8			216	528	464	192	752	752	112											
Semyon Rudnev V.	128	160	168	184	184	160	352	176	168	328	560	600	120	8									
Maria Savina Sergeevna													16	24									
Smotrín Ivan Sergeevich						104	720	408				280	232	184	48								
Elderly Alexander Y.									112	4 080	5 840	6 080	4 688	4 488	4 192	3 512	3 008	3 088	2 280	1 504	640	128	

Selecting the type of OLAP-cube date for indicators

When you create an index based on the query, the system specifies the type of OLAP-cube date used to calculate:

- **Date (exact)** - Used for most situations where a numeric props simply take the value of a specific date.
- **Date of (relative)** - Used when you want to get the last value of a numeric props, on the date of the table cell OLAP-cube. This should, as a rule, requests for performance of the system directories.

Save to switch to OLAP-cube

Indicators for OLAP-cube

Name: Payments

Type of indicator: Requirement Formula Indicator Increase Systemic

Features: Aggregation Hidden

Following the sub-

Setting request

Source: Directory OLAP-cube Object

Contacts: [dropdown]

Numerical requirements: [dropdown]

Criteria	Measurement Resources	Measurement of OLAP-cube
	Date of resources	Data OLAP-cube
	Systemic [dropdown]	<div style="border: 2px solid red; padding: 2px;"> Date (exactly) Date (exactly) Date (relatively) </div>

Step 6. Setting horizontal ties

Determination of horizontal connections

Communication allow you to link objects to each other, in the sense of their value is very close to the details. At the same time will be displayed as hyperlinks, while having cross-cutting nature. Creating a link from one object to another, you hereby simultaneously install and feedback between these objects, ie Communications are through.

The system is made of two types of communications - "Object-Object" - to bind different types of objects, and "Object-Contact" binding contacts with the tasks.

Connection type Object - Object

This type of connection is used:

- For communication projects and assets (directories) to change which of these projects are aimed. For example, the relationship of IT projects and registry information systems, communications Project construction and real estate, etc.
- Projects for communication with counterparties (directories). For example, the relationship of Projects and Clients, Projects and communications contractor.

After selecting the object types for links opposite portlets "The first group of objects" and "The second group of objects" settings will be to determine the properties and appearance of the portlet with links that appear in the related projects.

Consider the options:

1. **Portlet title** - Text field specifies the name of the portlet, which will be related objects;
2. **Allow selection of multiple values** - Determines how many connections can be created for this object, if the option is not selected, then the relationship with the object can be only one, if selected, the links can be somewhat;

3. **Allow selection of an existing object** - If selected, then the portlet links button will appear "Select", clicking which you can choose to link to from the list of already created in the project tree;
4. **Allow creation of a new object** - If selected, the links appear on the portlet "Create" button, clicking which you can create a new object for the current connection;
5. **Type of outcome presentation** - If you select "List" (the default), the portlet with links will be presented as a list of related objects if you select "Projects and work", the portlet will be presented in a report "Projects and work" on a sample of projects that were identified as objects for communication with the current object;
 - **Value required field** - This option adds an attribute is required to specify the associated object when the project;
 - **The root project** - This option allows you to specify the root of the project, firstly - narrows the search for the object in the procedure of choice for binding, and secondly - determines the location to save the object to create.

The screenshot displays the 'Continuity Properties' configuration window, which is divided into three main sections, each with its own 'Alter' button:

- Continuity Properties:** Shows the 'Name' as 'Projects and Information System' and 'Type of connection' as 'Object-Object'.
- The first group of objects:** Shows a list with one item, 'Information Systems'.
- Properties portlet communication first group of objects:**
 - Name portlet: Projekt
 - Allow selection of multiple values:
 - Allow the selection of an existing object:
 - Allow the creation of a new object:
 - Type of presentation of results: List
 - Value obligatory for filling:
 - The root project: Central Office
- The second group of objects:** Shows a list with one item, 'Project'.
- Properties portlet communication of the second group of objects:**
 - Name portlet: Informační systém
 - Allow selection of multiple values:
 - Allow the selection of an existing object:
 - Allow the creation of a new object:
 - Type of presentation of results: List
 - Value obligatory for filling:
 - The root project: The planning process

Connection type Object - Contact

This type of connection is used to link contacts (object directory entries) with tasks - calls and meetings. The difference is that for displaying tasks on the contact page is typically used as a presentation of the report "Projects and works", which shows a list of tasks in the table view.

Continuity Properties

[Alter](#)

Name **Contacts and Appointments**

Description

Type of connection **Object-Contact**

The first group of objects

	Name
	Contacts

Properties portlet communication first group of objects

[Save](#) [Cancel](#)

Name portlet

Allow selection of multiple values

Allow the selection of an existing object

Allow the creation of a new object

Type of presentation of results

Value obligatory for filling

The root project

The second group of objects

[Alter](#)

	Name
	Meeting

Properties portlet communication of the second group of objects

[Alter](#)

Name portlet

Allow selection of multiple values

Allow the selection of an existing object

Allow the creation of a new object

Value obligatory for filling

The root project

Step 7. Final Set objects

Object Properties Management

When creating a directory, projects and tasks, depending on the type of object, you need to determine the values of options that affect the properties of the object.

- **Object type** - In fact, elect directors, project or task.
- **May be the root** - Allows you to place objects of this type in the root system, forming with them a business environment. This property is available only for directories.
- **Show initiator** - If you enable this option, the object on the card will be further initiator object name - the author (creator).

The screenshot shows a web form titled "The new object". At the top left, there are "Save" and "cancel" buttons. The form contains several input fields and checkboxes:

Name	Katalogue
Description	
It may be the root	<input checked="" type="checkbox"/>
Object Type	Directorio
View the supervisor and administrator	<input type="checkbox"/>
View initiator	<input type="checkbox"/>
Check for identical objects	No
Contact with the process	No
Icon	modify remove

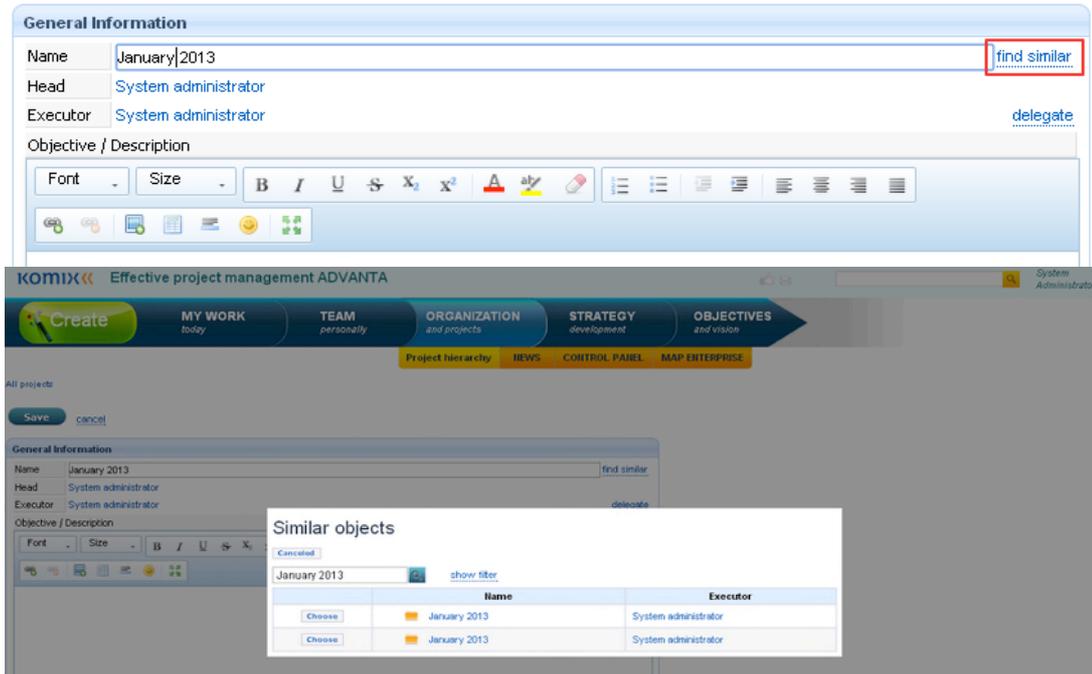
- **AutoComplete labor** - This property includes auto prostanovki labor in the Gantt chart (planning mode labor). In this case the following two rules:
 - Labor for each day duration of the project / task is 8 hours.
 - If this object (project or task) is subordinate tasks, its own labor costs are reset, and the total amount of labor as a form of subordinate tasks.

The new object

[Save](#) [cancel](#)

Name	Katalogue
Description	<div style="border: 1px solid #ccc; height: 60px;"></div>
It may be the root	<input checked="" type="checkbox"/>
Object Type	Directorio ▼
View the supervisor and administrator	<input type="checkbox"/>
View initiator	<input checked="" type="checkbox"/>
Check for identical objects	No ▼
Contact with the process	Electronic Protocol ▼
Icon	modify remove

- **Add to calendar artist and participants** - To automatically add it to the calendar task executor and participants. Available only for tasks.
- **Length Default** - Sets the duration, you want to be installed by default when you create the object. For example, it is logical to assume that the duration of the task of the project is usually one working day, and the duration of the meeting - one hour. Available only for tasks.
- **Check for identical objects** - With this option in the directory of this type there are two properties:
 - Input blocking two objects with the same name.
 - The button "Find Similar", which is present in the form of object creation, and run a quick search on the name of the object element.
 This option is used to counterparties.



1. **Associated with the process** - Allows you to associate an object with props process.
1. **Icon** - Used to select the object icon. You must use an image size of 32 X 32 pixels, preferably format png.

The new object

[Save](#) [cancel](#)

Name

Description

Object Type

View initiator

Auto fill labor costs

Add to Calendar administrator and participants

The duration of the silencing

Check for identical objects

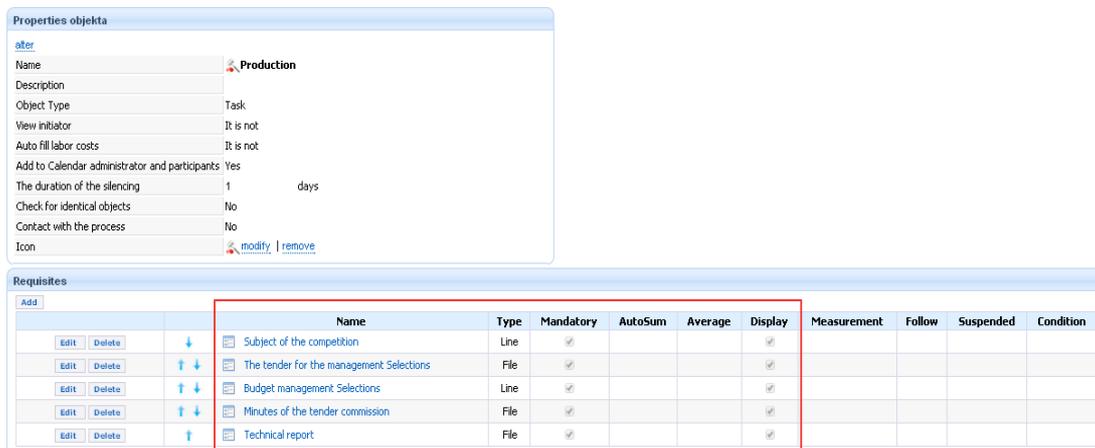
Contact with the process

Icon [place icon](#)

Setting the properties details

Each object in the Advanta can associate one or more essential elements, thereby forming a "passport facility." At the same time the formation of a passport for details need to set their properties in the object.

- **Mandatory** - Property defines the required fields props. It should be noted that it is applicable to the details files.
- **AutoSum** - When this option reports for current props will display the grand total.
- **Show** - This property makes props visible. Hiding the details used in two cases:
 - For details, which may already be outdated, but the values which must be preserved.
 - For details, which are used for special purposes, and should not be available to users. For example, for details, indexes created with the purpose of counting objects in OLAP-cube.



The screenshot shows two panels from the Advanta software interface. The top panel, titled 'Properties objekta', displays various configuration options for an object named 'Production'. The bottom panel, titled 'Requisites', shows a table of requisites with columns for Name, Type, Mandatory, AutoSum, Average, Display, Measurement, Follow, Suspended, and Condition. A red box highlights the first four columns of the table.

Name	Type	Mandatory	AutoSum	Average	Display	Measurement	Follow	Suspended	Condition
Subject of the competition	Line	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>				
The tender for the management Selections	File	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>				
Budget management Selections	Line	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>				
Minutes of the tender commission	File	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>				
Technical report	File	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>				

- **Measurement** - This property is available only for details classifier. It makes the requisite additional dimension OLAP-cube (see "Configuring OLAP-cubes", item "Measurements OLAP-cube").
- **Inherit** - This property allows you to inherit the value of props on a child object.
- **Conditional** - This property is available only for details classifier. If we make props conditional, in the future,

depending on the selected values, you can upload additional details.

- **Condition** - This column configures dependent details. For each dependent is determined by a specific value props conditional props when placing props which this should be displayed.

The screenshot shows two panels. The top panel, 'Properties objekta', contains various configuration fields like Name, Description, Object Type, and duration. The bottom panel, 'Requisites', is a table with columns: Name, Type, Mandatory, AutoSum, Average, Display, Measurement, Follow, Suspended, and Condition. A red box highlights the 'Condition' column, where a 'Determine' button is visible in the 'Budget management: Selections' row.

Name	Type	Mandatory	AutoSum	Average	Display	Measurement	Follow	Suspended	Condition
Subject of the competition	Line	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>				
The tender for the management: Selections	File	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>				Determine
Budget management: Selections	Line	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>				
Minutes of the tender commission	File	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>				
Technical report	File	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>				
xpx	Taxonomist	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Parent and child facilities

Portlets "Parent objects" and "Children of" chain of command objects adjusted to each other. The total logic of hierarchy is as follows:

- Only the directory may be fundamentally hierarchical structure.
- Inside the directory, you can create a directory, projects and tasks.
- Within projects can only create projects and tasks.
- Inside the tasks can be created only problem.

The screenshot shows four panels. The top panel is 'Properties objekta'. The middle panel is 'Requisites' with the same table as above. The bottom-left panel, 'Parent objects', shows a list of objects including 'MANAGEMENT', 'Project', and 'Task'. The bottom-right panel, 'Child objects', shows a list of objects including 'Task'. Red boxes highlight the 'Parent objects' and 'Child objects' panels.

Subsidiaries Reference

In this section, connection of objects made with directories. While for directories that are set to display the hierarchy of subordinate projects, you can set a choice of two values:

1. **Viewing Data** - This value is set when we were at the level of the object you want to prevent data entry, but to leave the ability to view.
2. **Viewing and entering data** - Enables both input and view data.

For example, if cost data should be recorded at the task level, you need to associate the directory "costs" objects "project" and "task", while in the draft to only allow viewing of directory data, and solve problems at the level of viewing and entering data.

Properties objekta

alter

Name Project

Description

It may be the root Yes

Object Type Directorio

View the supervisor and administrator It is not

View initiator It is not

Check for identical objects Yes

Contact with the process Electronic Protocol

Icon modify | remove

Requisites

Add

	Name	Type	Mandatory	AutoSum	Average	Display	Measurement	Follow	Suspended	Condition
Edit Delete	Tip of the project	Taxonomist	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Edit Delete	Production time (days)	Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Edit Delete	Expected number of parts (ks)	Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Edit Delete	Project Notes	Line	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Edit Delete	Expected completion date	Date	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Edit Delete	Instead of making	Taxonomist	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Edit Delete	Electronic Protocol	Taxonomist	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Rodičovské objekty

Alter

Name
"Unit-form", OAO
Catalog
Project

Child objects

Alter

Name
MANAGEMENT
Project
Meeting
Central Office
Construction
Production
Task

Horizontal continuity

Projects and Information System

Ranking bookmark the page object

Alter

Object / action / link	Signatures on the button
Main	Main
Gantt	Gantt
Discussion	Discussion
Papers	Papers
Arrangements	Arrangements
Members	Members
Finance	Finance

Subordinated manuals

Alter

Name	Directory Properties
Plot	Viewing and entering data
Delivery	Viewing and entering data
Employment history	Viewing and entering data

OLAP Reports

[add report](#)

Creating reports in objects

In this section the main page of the object, you can add customized OLAP-reports.

To do this, press the "Add account", select the report you want and build it. Gather data on all objects of this type. Next you need to customize the appearance of the report, if necessary - to enable display of graphs. Save Report.

As a result, at the entrance to object and further creating a report, the system will automatically build the sample, limited data object, ie actually build only report on this subject.

Properties objekta

[alter](#)

Name: Production

Description:

Object Type: Task

View initiator: It is not

Auto fill labor costs: It is not

Add to Calendar administrator and participants: Yes

The duration of the silencing: 1 days

Check for identical objects: No

Contact with the process: No

Icon: [modify](#) | [remove](#)

Requisites

[Add](#)

	Name	Type	Mandatory	AutoSum	Average	Display	Measurement	Follow	Suspended	Condition
Edit Delete ↓	Subject of the competition	Line	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>				
Edit Delete ↑ ↓	The tender for the management Selections	File	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>				
Edit Delete ↑ ↓	Budget management Selections	Line	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>				
Edit Delete ↑ ↓	Minutes of the tender commission	File	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>				
Edit Delete ↑	Technical report	File	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>				

Parent objects

[Alter](#)

Name
MANAGEMENT
Project
<input checked="" type="checkbox"/> Task

Child objects

[Alter](#)

Name
<input checked="" type="checkbox"/> Task

Ranking bookmark the page object

[Alter](#)

Object / action / link	Signatures on the button
Main	Main
Gantt	Gantt
Discussion	Discussion
Papers	Papers
Arrangements	Arrangements
Members	Members

Subordinated manuals

[Alter](#)

Name	Directory Properties
Plot	Viewing and entering data

OLAP Reports

- [add report](#)
- [Taxonomist](#)
- [Payments to suppliers](#)
- [Calculation of gross wages](#)

Strana 71 ze 91

Step 8. Using indexes

Defining Indexes

Indices - is hidden optional numerical details associated with the objects and directories.

To create an index, perform the following steps:

1. Create numerical props called - "Index".
2. This props add to the necessary objects and directories.
3. In the properties to remove props, options: show, required.

Properties objekta

[alter](#)

Name [Idea](#)

Description

Object Type

View initiator

Auto fill labor costs

Check for identical objects

Contact with the process

Icon [modify](#) | [remove](#)

Requisites

[Add](#)

		Name	Type	Mandatory	AutoSum	Average	Display	Measurement	Follow	Suspended	Condition
Edit	Delete	↓	Description thoughts	Line	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>				
Edit	Delete	↑ ↓	Designed contribution *	Line	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>				
Edit	Delete	↑ ↓	The planned implementation complexity *	Line	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>				
Edit	Delete	↑ ↓	The projected economic benefits CZK / year	Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>				
Edit	Delete	↑ ↓	Otimalizovateľná aktivita *	Taxonomist	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Edit	Delete	↑ ↓	Recommended for implementation?	Yes / No	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>				
Edit	Delete	↑	Technical documentation	Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>				

Working with system performance

OLAP-cubes allow you to use in the reports system performance: planned and actual duration, planned and actual percent complete, elapsed time deviation.

But if you just create OLAP-cube and set it relevant details, the reports they will not be displayed.

That system performance earned, you must:

- 1) Create props "Index" in the objects for which payment is required system performance.
- 2) Create OLAP-cube "System performance".
- 3) In the OLAP-cube create a dimension "Date", as well as other measurements which retrieves system.
- 4) Create index "Index" - the type of object request (point to) property - "Hidden".
- 5) Create the desired system performance.

Vlastnosti templates OLAP-cube

Alter

Name: **System indicator**

Description:

Icon: [place icon](#)

The number of digits after the decimal point: 2

Measurement

Create

Name	Description
Date	Date

Indicators

Create

Name	Source	Features
Time of completion	System: The planned duration of	
Duration	Formula: Deviation	
Index	Object: Tasks Numerical requirements: Technical documentation Criteria: Start Date	Hidden
Deviation	System: Deviation closing	

Object Counting

Using OLAP-cubes can count the objects that satisfy the conditions of the sample. For example, for portfolio analysis may be necessary visual report that shows how many projects on which phase is now.

For that to build it, you need to create the indicator "Number", which will count the number of objects (directories, projects, tasks):

- 1) Create props "Index" in the objects for which the necessary counting.
- 2) Create OLAP-cube. His name is usually arbitrary, in the sense associated with the name of the object. For example, "Indicators of transactions."
- 3) In the OLAP-cube create a dimension "Date", as well as other measurements which retrieves system.
- 4) Create index "Index" - the type of object request (point to) property - "Hidden".
- 5) Create the indicator "Number", which is calculated by the formula "Index" + constant (1).

Vlastnosti templates OLAP-cube

Alter

Name: Transaction

Description:

Icon: modify | remove

The number of digits after the decimal point: 0

Measurement

Name	Description
Alternative Project	Classifier requirements «Alternative Project»
Date	Date
Stage of the transaction	Classifier requirements «The current phase of the transaction»
Potential seller	Classifier requirements «Potential seller»
Source Solutions	Classifier elements of «source of contact / transactions»

Indicators

Name	Source	Features
Amount	<p>Object: Agreement</p> <p>Numerical requirements: Value of transactions (CZK)</p> <p>Criteria: Created</p>	Hidden
Index	<p>Object: Agreement</p> <p>Numerical requirements: Index</p> <p>Criteria: Start Date</p>	Hidden
Number	<p>Formula: Index + 1</p>	Aggregation
Probability of sale	<p>Folder: Probability of sale</p> <p>Numerical requirements: Probability of sales, %</p> <p>Criteria:</p>	
Expected sale	<p>Formula: Probability of sales * (Index + 1) / 100</p>	Aggregation

Counting records directories

Using OLAP-cubes can count the directory entries that satisfy the conditions of the sample. For example, to analyze the sales department may be necessary visual report that shows how many contacts during the week managers do.

For that to build it, you need to create the indicator "Number", which will count the number of records desired directory.

- Create props "Index" in the directory that needs to count the number of records.
- Create OLAP-cube. His name is usually arbitrary, in the sense associated with the name of the directory. For example, "Indicators of activities."
- In the OLAP-cube create a dimension "Date", as well as other measurements which retrieves system.
- Create index "Index" - the type of request from the directory (specify directory) property - "Hidden".

The image shows two screenshots from a software interface. The left screenshot, titled "Indicators for OLAP-cube", shows a form where the "Name" field is set to "Index" and the "Type of indicator" is set to "Requirement". The right screenshot, titled "Setting request", shows a form where the "Source" is set to "Directory" and the "Numerical requirements" are set to "Index".

- Create the indicator "Number", which is calculated by the formula "Index" + constant (1).

The image shows two screenshots from a software interface. The top-left screenshot, titled "Vlastnosti templates OLAP-cube", shows a form where the "Name" field is set to "Number of entries in the directory". The top-right screenshot, titled "Measurement", shows a table with columns "Name" and "Description". The bottom screenshot, titled "Indicators", shows a table with columns "Name", "Source", and "Features".

Name	Source	Features
Index	Folder: Assets Numerical requirements: Index Criteria: Counterparties Date	Aggregation, Hidden
Number of entries in the directory	Formula: Index +1	Aggregation

Step 9. General Settings

System Settings

- **The timer settings** - in this section are made system timer settings on which sent automatic reminders and requests to directories.
- **License Information** - going on this page you can get information about the parameters of the license. There's also set the type of license, which will be assigned by default when creating a new user.
- **Setting up access to FTP** - here you can configure access to the FTP server for use when storing files.
- **Setting SMTP server** - you can make settings for the SMTP server alerting system. This section specifies the name of the sender e-mail messages, as well as additional text that can be inserted in each email newsletter.
- **Settings panel and logo** - this section edits the logo on the login page, the installation of banners or logo in the upper left corner of the system, as well as change the text and color the top panel.
- **The information collection system error** - this section is activated automatically send error messages to mail the developer. We strongly recommend that you do not disable this option. In that case, if your system does not have access to the Internet, the possibility of formation of a manual error log for a specified period to be sent to the developer.
- **Setting up of a map** - you can include an additional section of the system - a map. When you turn the card you need to pay attention to two things:
 - 1) The scale of the map by default;
 - 2) centering the default map.
- **Managing user agreements** - in this section you can enable and customize the text of the user agreement that users must take to start working with the system. We strongly recommend to enable this functionality for agreement on "Personal Data Protection".
- **Setting Active Directory** - on this link you can see the parameters of connection with Active Directory. The

setup procedure is described in the technical administrator.

The screenshot shows the 'Adjustment' section with various system configuration options and the 'Project Settings' section with checkboxes and input fields.

Adjustment	Description
Setting the timer	Setting the parameters of the system timer, on the basis of which sends automatic reminders to directories and requirements.
License Information	Viewing license information
Setting up access to FTP	Setting up access to the FTP server to be used in saving the file
Setting the SMTP server	Setting the SMTP server for sending notification system
Settings panel and logos	Setting logos, signs
The system of collecting information on errors	System setup and data download error
Set Maps	Connections and Setup Card
Managing user agreements	Activation and adjustment of
Setting up Active Directory	Setting the connection with Active Directory (service adsf)

Project Settings	Value
Skip phase of acceptance of authority to the project.	<input type="checkbox"/>
The number of days that highlights the completion date of the project:	2
Automatic calculation of the percentage of completion	<input checked="" type="checkbox"/>
Activate the education system for all users	<input type="checkbox"/>

Follow the links below options that determine the properties of the projects and of the whole system:

- **Skip phase acceptances authority to draft** - This option disables the confirmation request, which occurs when delegating tasks and projects. Tasks are sent immediately, without query appears. It should be noted that this does not occur as events, and related notifications. Option is used at system startup when you need to distribute powers large number of users on a pre-uploaded project.
- **Number of days warning of project completion** - If the value is set, the system will create an event of the impending completion of the project. When this notification will occur only when the subscription for this type of event.
- **Automatic calculation of the percentage of completion** - Activates the interest calculation tasks and projects. Uses the same method of calculation as in MS Project.
- **Activate learning system for all users** - This option includes tooltips that arise when working in different sections of the system.
- **Automatically confirm registration** new users - This option disables the validation procedure of registration of new users, users are created automatically at the time of filing. This option makes sense only when using the system as public portals.

- **Show Quick Tour after update** - This option runs a training presentation that appears on the home page of the system after its next update.
- **Use the procedure of acceptance problems** - This option runs the acceptance procedure for the tasks for which director and singer - different users. Contractor may transfer the task to the status "ready to test", and the head makes the final acceptance, with automatic transfer to the status of "Completed."
- **Activate the module strategy** - Includes a section menu "Development Strategy" strategic maps. Access to the section governed by separate rights, it must be set!
- **Activate the module objectives** - Includes the menu section "Objectives and vision" with the possibility of creating a gallery purposes. Access to the section governed by separate rights, it must be set!
- **Activate the module news** - Includes a section menu "Organization and projects / News" with the ability to create news. Access to the section governed by separate rights, it must be set! To the news became visible to users, it must be published in the group, which is active users.
- **Create queries through a chain of related tasks** - This option runs the task requests from performer to performer-related communication "Finish-Start" on the Gantt chart.
- **Show section "About" to all users** - Includes a section "About" on your home page, and also includes a block of copyright on a login page (version number, a link to the site developer, the name of the system). Section "About" gives you the opportunity:
 - 1) Slide Show last update;
 - 2) Go to the help system;
 - 3) Go to service "Reformal" for publication of the application for revision of the system (it can make any user, not just specialist TA).
- **Forced use HTTPS** - Makes automatic redirection from the address http address https. Recommended

to use this option only if your organization has the right to use this protocol (ie, a self-signed certificate is not).

- **Activate matching module** - Includes a section menu project "Reconciliation" with the possibility of matching documents.

The screenshot shows two panels from a web application. The left panel is titled "Adjustment" and contains various system configuration options. The "Project Settings" section is highlighted with a red box and includes options like "Skip phase of acceptance of authority to the project", "The number of days that highlights the completion date of the project" (set to 2), and several checkboxes for activating features like "Automatic calculation of the percentage of completion", "Activate the education system for all users", and "Activate modular strategy".

The right panel is titled "Work calendar (1)" and shows a table of commands. The table has columns for "Display", "Object / action / link", and "Text command". It lists various system objects such as Discussion, Document, Tasks, Calendar, Project, Supplier, Catalog, Report, Associated with the system, Internet, Index, Treaty, Idea, Investment projects, and Buildings, each with a corresponding text command.

Setting time tracking

In a separate portlet customization capabilities derived time accounting staff in the project:

The screenshot shows two panels. The left panel is a settings form with a red box around the "Setting time tracking" section. It includes a list of options with checkboxes, such as "Activate modular strategy", "Activate the objectives of the module", "Activate module news", "Make requests through a chain of related tasks", "See section 'System' to all users", "Forcing HTTPS", "Activate modular coordination", "Allow editing of documents via WebDAV", and "Use the new Gantt chart". Below this is the "Setting time tracking" section with an "Alter" button and fields for "Directory" and "Statement time", with "Primetype" set to "Sum".

The right panel shows a list of resources with a red box around it. The list includes "Idea", "Investment projects", and "Buildings", each with a small icon and a text label.

Portlet selected directory and its props, on which will be collected by employee actual work.

Select only possible reference, which simultaneously activated options:

- "Add to cut resources" (resource directory)

- "Use the approval process,"
- In the option "Use date" is set to "Yes, manual input."

Also selected to bind a reference to all objects (projects, tasks, appointments, etc.), which are supposed to keep employee hours actually spent on the project (task).

As props directory selection is made all details of the directory number type.

After setting all the clocks, introduced in the selected table project (task) automatically fall into the selected portlet "Setting time tracking" directory. Ie report card, in fact, is an optional interface for creating the directory entries.

The opposite is true - all entries entered in the specified directory are automatically displayed in the report card project resource (task) directory is used:

My report card from 07.07.2014 to 13.07.2014 (for editing)

Add table started and completed my task: [off](#)

July 2014							Project	Mon	W	Wed	Thu	Fri	Sat	Sun	In total	
30	1	2	3	4	5	6	Development of information technology									
7	8	9	10	11	12	13	IT Asset Management				3,50	16,00				19,50
14	15	16	17	18	19	20	Customer Support						8,00			8,00
21	22	23	24	25	26	27	Software Development									
28	29	30	31	1	2	3										
4	5	6	7	8	9	10										

All projects / development of information technology ... / Strategic Planning / Building Strategy in 2011

Preparing for strategic planning session

[change](#) [move](#) [subscribe](#) [remove](#)

[convert](#) [permissions](#) [recalculate dates](#)

Time management

[upload from excel](#)

Reported on: On editing Approved

Project	Status	Author	Date	Resource	Regular time, hours
Preparing for strategic planning session	On editing	Anatoly Yefremov	08.07.2014	Oleg Voronov	3,5
	On editing	Anatoly Yefremov	08.07.2014	Oleg Voronov	16
In total					19,5

Commands available through the "Create" button

Teams - this drop-down list to create objects that opens after you click "New" in the upper left corner of the screen.

Teams are configured in the "Administration / General Settings".

It is recommended to arrange commands in such a way that most of the action is on. These are:

- creation of discussion;
- creation of a document;
- creating tasks.

The image shows two screenshots from a web application. The left screenshot is titled "Adjustment" and contains various system configuration options such as "Setting the timer", "License Information", "Setting up access to FTP", "Setting the SMTP server", "Settings panel and logos", "The system of collecting information on errors", "Set Maps", "Managing user agreements", and "Setting up Active Directory". Below these are "Project Settings" with checkboxes for options like "Skip phase of acceptance of authority to the project" and "Automatic calculation of the percentage of completion".

The right screenshot is titled "Work calendar (1)" and shows a table of commands. The table has three columns: "Display", "Object / action / link", and "Text command". A red box highlights the "The commands" section of the interface.

Display	Object / action / link	Text command
<input checked="" type="checkbox"/>	Discussion	Discussion
<input checked="" type="checkbox"/>	Document	Document
<input checked="" type="checkbox"/>	Tasks	Task
<input checked="" type="checkbox"/>	Calendar	Calendar
<input checked="" type="checkbox"/>	Project	Project
<input checked="" type="checkbox"/>	Supplier	Supplier
<input checked="" type="checkbox"/>	Catalog	Catalog
<input checked="" type="checkbox"/>	Report	Message
<input checked="" type="checkbox"/>	Associated with the system	Associated with the system
<input type="checkbox"/>	Internet	Internet
<input type="checkbox"/>	Index	Index
<input type="checkbox"/>	Treaty	Treaty
<input type="checkbox"/>	Idea	Idea
<input type="checkbox"/>	Investment projects	Investment projects
<input type="checkbox"/>	Buildings	Buildings

Also, here you can create so-called procedure - this page of creating something (project tasks, discussions, document) in a predetermined directory or the system design.

For example, setting up procedures to create discussion in the catalog "IT Applications" via the command "application in IT" is as follows:

- Go to the directory "Applications for IT."
- Go to the tab "Discussions."
- Press "Add" discussion.

- Copy to clipboard link address. Will be something like your system URL:
 https://your-host-name-or-IP- / cmn.aspx?
 PageName = Discussions.Topic.Edit & projectid =
 b5247219 - b1db-4c62-83d3-bbaec824e867 &
 problem = true
- In the Setup section commands click "Add reference to the procedure."
- In the address box, type the following text. Please enter ~ /, and then - the link text after the slash. Should have:
 ~/cmn.aspx? PageName = Discussions.Topic.Edit &
 projectid = b5247219-b1db-4c62-83d3-
 bbaec824e867 & Problem = true
- Do not substitute part of the link "https://your-host-name-or-IP- your system", otherwise the system will be unusable!
- Enter the same command text "Application for IT" icon attached.
- Result: when the user click on the command "Application for IT", it immediately goes to the procedure of generating discussion in the directory "Applications for IT."

Icon / link	Text command
<input checked="" type="checkbox"/>	Discussion
<input checked="" type="checkbox"/>	Document
<input checked="" type="checkbox"/>	Task
<input checked="" type="checkbox"/>	Calendar
<input checked="" type="checkbox"/>	Project
<input checked="" type="checkbox"/>	Supplier
<input checked="" type="checkbox"/>	Catalog
<input checked="" type="checkbox"/>	Message
<input type="checkbox"/>	Associated with the system
<input type="checkbox"/>	Internet
<input type="checkbox"/>	Index
<input type="checkbox"/>	Treaty
<input type="checkbox"/>	Idea
<input type="checkbox"/>	Investment projects
<input type="checkbox"/>	Buildings

Project Templates

When working with a large number of similar projects, there is a problem of standardization approaches in their planning and control. For this Advanta allows use project templates - ready structure with preformed structure works (WBS), with given (recommended) durations and sequencing (dependencies) between the works.

All Projects / Construction Management / New building projects

Setup and assembly production lines kontinuelniho drilling

[change](#) | [hide responsible](#) | [relocate](#) | [subscribe \(6\)](#) | [remove](#)

Main
Gantt
Discussion
Documents (1)
Arrangements
Members (4)
Budget
External supply
Score
Risks
Construction
Report on project status
Bookkeeping

[Translate to next stage](#)

1ST OPENING
2ND DEVELOPMENT
3: IMPLEMENTATION
4TH COMPLETION

Head
 Sahula Martin
[revoke the delegation](#)

Executor
 Karel Vorel
[delegate](#) | [delegate all](#)

News

- Agreements with suppliers
- Projects and Work

Requisites

Order appointing a project manager	Create The order appointing a project manager
Project budget (CZK)	36000000
Revenue, for projects with VAT	96000000
Margin of profit margin (%)	37.5%
The results and success criteria of the project	Description of results and success criteria
Limitations and assumptions	It describes the limitations and assumptions

Hierarchical structure

[download the excel](#) | [unload in excel](#)

[Add](#)

Nájit... [show filter](#) [go to bookmark](#) [wrap bookmarks](#) [detailed view](#)

+	✓ Pre-investment phase	100%	System administrator
+	✓ Research and development	82%	System administrator
+	✓ Preparation for construction	50%	System administrator
+	✓ The actual implementation	0%	System administrator
+	✓ Date of transmission lines skopnletované	0%	System administrator

Below are the main features of the project templates.

Project name Deployed from the default template can be empty (used for deployment projects) or contain the name of the template. The last option is used when some of the patterns formed milestones.

Mandatory details template ignored.

Dates when creating the template are copied. To project deployed from the template starts with the current date and the completion date was correct, we have to remove from your problems with constraints (they are visually displayed in bold), and the entire sequence of operations to build through communication.

Documentation Stored in the template are copied to the new project. It is most convenient to save templates control documents at the individual tasks and milestones, without attachment which to complete the task or milestone will be impossible.

Project		Name
Setup and assembly production lines kontinuálního drilling	<input type="button" value="Add"/>	
		The order appointing a project manager

Subsequently, the implementation of the project, when the user changes the status of milestones or tasks "Ready for testing", the system will check the availability of the necessary documents, and signals an error if they are missing.

Assumed	June 5, 2014	June 5, 2014	0 days	0	System administrator
Assumed	June 5, 2014	June 5, 2014	0 days	0	System administrator
Assumed	Change in is not possible because the project or subproject are no binding documents				
Assumed	June 5, 2014	June 5, 2014	0 days	0	System administrator

As a result, you can always be sure that perform tasks or milestones confirmed the necessary accounting documents.

Role of leader and performer. Sometimes projects for the same work sites meet the same staff. In this case the Advanta allows to use automatic delegation of work to create a new project template from the right people.

Name	Description	
Template no.1		<input checked="" type="checkbox"/>

Entries directories Stored in the template are copied to the new project.

Templates approvals

Templates allow advance approvals form the most frequently used routes approvals.

You can specify the type of coordination (parallel and sequential), matcher, matching the order of passage, as well as response time.

Settlement Scheme

Start with agreements Cancel

Parallel Agreement
 gradual Agreement

	User	The deadline for approval	
↓	Walk Tomáš	1 hour (in) ▼	Remove
↑	Karel Vorel	1 hour (in) ▼	Remove

Choose a user

Add to list 🔍

	Subsection / Name	Function
+	Guide	
+	All users	

Add to list

Common user reports

General reports allow users to quickly give users ready reports that are configured on the specified requirements, without the need to customize these reports for each user separately.

The creation of such reports may only system administrator. To create a report, you must report the total just to keep in the group, which users should see the report on the Home page.

Coordination Document

Save / change / to clarify the choice / to remove the / **open group (0)** / contact with object

Period: View all entries

I am the author I am the coordinator Open an agreement Agreed There is no agreed

View a list of hidden columns | Export to Excel | Export to PDF | Export to RTF | Display 25 lines

Agreement	Status	Document	Author	Content	Created	Date of change agreement
Contract 65/PI data from June 15, 2013						
Reconciliation Document "Contract 65/PI data from June 15, 2013"	Open an agreement	Contract 65/PI data from June 15, 2013	System administrator		1st 7th 2014	1st 7th 2014
Contract No. 48 Zabezečení construction						
Reconciliation Document "Order security services"	Open an agreement	Order security services	System administrator		24th 6th 2014	24th 6th 2014

It should be noted that normal users (not administrators) can not change the report, it can only make the administrator.

In describing the general reports, you must also mention the quick filters.

Quick filters - A block of options-filters that allow you to sample values depending on the user's role in relation to the information in the report. These filters, depending on the selected values allow us to show:

- in my control - problems in which the head of the user;
- I have on performance - tasks in which the user performer;
- is the initiator - the tasks for which the user created by:

Projects and Work

[Save](#)
[change](#)
[to clarify the choice of](#)
[cancellation](#)
[open group \(0\)](#)
[contact with object](#)

Name

Period

 View job without subsidiaries
 Expired
 For me to check
 For me to settle
 I am the initiator

[View a list of hidden columns](#)
[Export to Excel](#)
[Export to PDF](#)
[Export to RTF](#)
 Display

Transfer the column to group			
Name	Status	Executor	Scheduled date of completion
Contract 65/PI data from June 15, 2013	Developing	System administrator	19th 6th 2014
Contract No. 35/PI of June 25, 2013	Completed	System administrator	18th 6th 2014
Contract No. 49/SMR of July 1, 2013	Developing	System administrator	18th 6th 2014
Contract No.41 dated April 21, 2013	Completed	System administrator	18th 6th 2014
Contract No. 48 Zabezečení construction	Developing	System administrator	18th 6th 2014
Contract No. 26 / E of 25.05.2013	Assumed	System administrator	19th 6th 2014

- I am the author - writing handbooks, discussions, documents and approvals, in which the user author;
- I'm aligner - coordination, in which the user matcher:

Coordination Document

[Save](#)
[change](#)
[to clarify the choice of](#)
[cancellation](#)
[open group \(0\)](#)
[contact with object](#)

Name

Period

 I am the author
 I am the coordinator
 Open an agreement
 Agreed
 There is no agreed

[View a list of hidden columns](#)
[Export to Excel](#)
[Export to PDF](#)
[Export to RTF](#)
 Display

Name						
Agreement	Status	Document	Author	Content	Created	Date of change agreement
Contract No. 48 Zabezečení construction	Open an agreement	Order security services	System administrator		24th 6th 2014	24th 6th 2014

- I am a member - a discussion in which the user party;
- User is the editor - documents in which the user editor:

,

Documents Project

[Save](#)
[change](#)
[to clarify the choice of](#)
[cancellation](#)
[open group \(0\)](#)
[contact with object](#)

Name

Period

I am the author
 I am editor

[View a list of hidden columns](#)
[Export to Excel](#)
[Export to PDF](#)
[Export to RTF](#)
 Display

Name	Document	Description	Editor	Modified
Contract 65/PI data from June 15, 2013				
	Contract 65/PI data from June 15, 2013		System administrator	24th 6th 2014
Contract No. 35/PI of June 25, 2013				
	Contract No. 35/PI of June 25, 2013		System administrator	24th 6th 2014
Contract No. 49/SMR of July 1, 2013				
	Contract No. 49/SMR of July 1, 2013		System administrator	24th 6th 2014
Contract No.41 dated April 21, 2013				
	Contract No.41 dated 21.4.201		System administrator	24th 6th 2014
Contract No. 48 Zabezečení construction				
	Order security services	Order security services	System administrator	24th 6th 2014
Contract No. 26 / E of 25.05.2013				
	Contract No. 26 / E of 25.05.2013		System administrator	24th 6th 2014

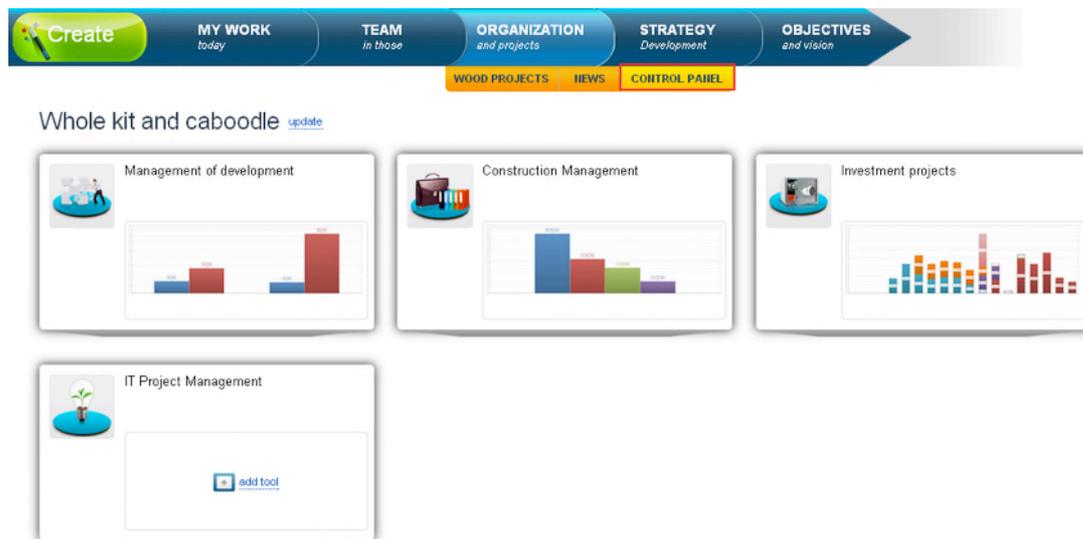
When you create summary reports of these filters can also be used, as they apply at the time of construction of the report with respect to the user who opens the report.

- result can be immediately set up such basic reports, such as:
 - My problem under control
 - My tasks for execution
 - My Documents
 - My discussions
 - Etc.

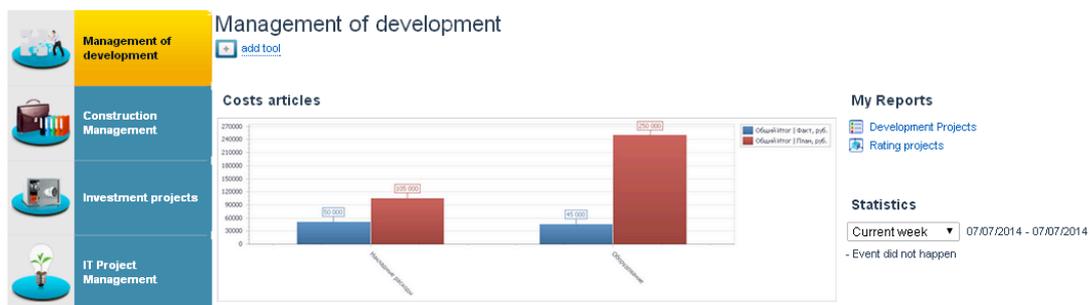
Customizing Your Control Panel

Control Panel - set of items that collect basic information on all areas of business.

The control panel has two levels of display. At the level of refund is determined by the composition of the elements of the structure of business environment. Each element - it die on schedule OLAP-report or strategic map.



When you click on an item occurs provalivaniem inside, where each line of business, you can customize your own Control Panel (Dashboard).



To add a tool in the Control Panel, click "Add tool." Currently available are four types of instruments:

- Report - after selecting launch the wizard report that after saving the page will appear on the control panel.
 - Indicator KPI - the selection is made from the available indicators.
 - The statistics module - statistics on nested projects the current directory.
1. Strategic map - selection is made from a set of already created in the system of strategic maps.



Moving tools panel by simply capture and transfer arm.



On the upper level is displayed by default is the upper tool section.

It should be noted that the section "Control Panel" is only available to users with a license type "Manager".

Order services for configuring the system

This booklet highlights key questions regarding setting up solutions based on system Advanta.

Additionally, you can always ask us for advice on how to configure solutions for your enterprise.

Our contacts

KOMIX s.r.o.

Telephone: +420 257 288 211

Mail: sales@komix.cz

The demo version of the system and a description of other functional solutions are available at:

<http://www.advanta-group.cz>