User Manual

1Forma system

1Forma

workflow management system

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I Start Working with the System

The philosophy of the performance discipline control

Business processes. Employees' Roles

TASK is an elementary unit of information

1.1 The philosophy of the performance discipline control

The system of 1FORMA is designed for the everyday work of ordinary employees, their managers and the company's top management. The system refers to the following general categories Workflow (management of work flows), ECM (enterprise content management), BPM (business performance management), which contemplates the solutions to following tasks:

- monitoring of tasks and assignments;
- automation of standard business processes;
- electronic document flow management;
- customer relationship management (CRM);
- project management;
- report generation;
- 1C integration.

To solve these tasks and objectives, this system provides users with such utilities and services, as tasks, guides; discussion and approval, negotiation, approval, and monitoring, filtering and retrieval, user access and user groups' administration mechanisms, reports, etc.

In this user manual, we will describe the system functionality, tell you about how to use 1FORMA tools in handling tasks and assignments, as well as in the analysis and employees' performance assessment, show specific examples of business processes and their execution using 1FORMA.

1.2 Business processes. Employees' roles

Business Process (BP) is a set sequence of actions aiming to achieve a certain objective. BPs have the beginning (input) and completion (output) and the execution route, which is described as a sequence of solutions (analysis of specific conditions) and actions (steps). During its performance, BPs involve certain resources.

BP are developed and implemented in a specific context, which includes, inter alia, the company's organizational structure and relationship (roles) between the BP participants.

The role is a set of user's authority required to perform certain functions related to a particular BP.

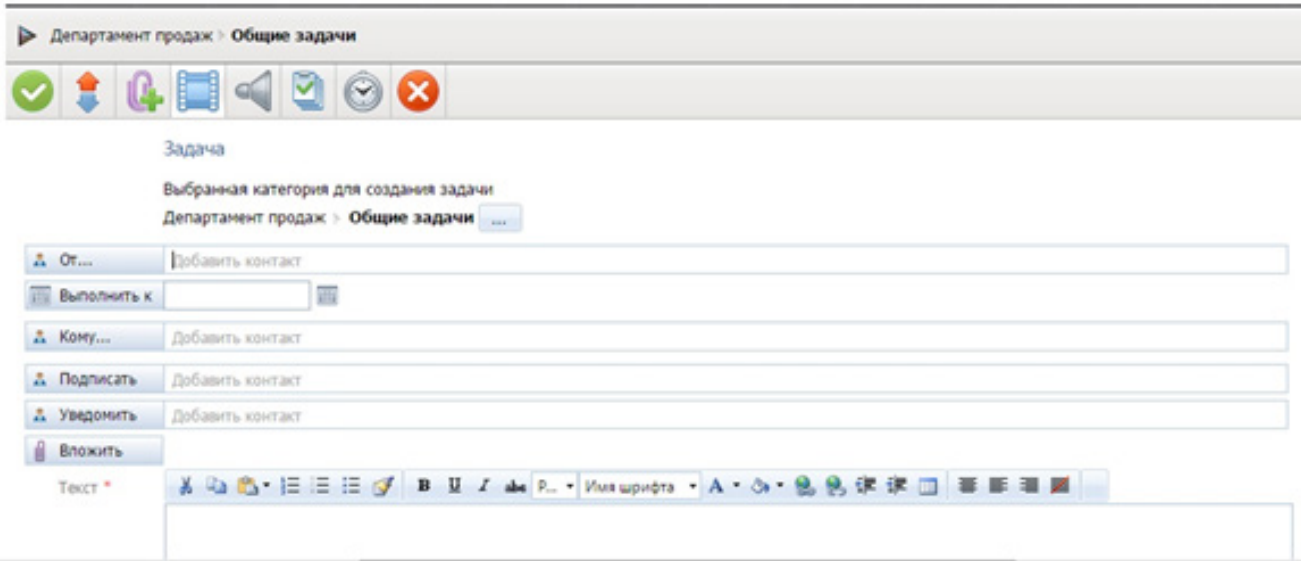
In various BPs, the same employee may perform a variety of roles: Whether in one BP he plays the role of a customer (initiator), in the second BP he acts as an assignee, in the third BP, a subscriber (observer, who receives a task progress notification), and in the fourth role, he works as an acceptor (employee who gives consent to perform certain actions). Besides, a job position in the company's organizational structure also attributes to the user's authority. For example, a head of a corporate unit may supervise acts of his/her subordinates.

An employee's role determines rights for access and performance of certain actions. For instance, in some BPs, a customer may change the task accomplishment date, and an assignee may not change the deadline.

During the task performance, changes to subscribers, assignees and even customers are possible. For example, an assignee can refuse to execute a task or delegate it to another responsible person. A task-giver can go to the other position, transferring all previous control issues to a replacement employee. A colleague from the related unit may be interested in the task and becomes a subscriber to control the task implementation. Possible changes to the roles for the tasks are determined by the system settings for a specific installation version of 1FORMA.

1.3 TASK is an elementary unit of information

Implementation of any business process requires a specific sequence of actions that would normally take the form of tasks (assignments). In real life tasks are given to certain individuals, with the prescribed deadlines, with the detailed description what exactly needs to be done, or a situation to be resolved. Accordingly, when working within 1FORMA system tasks are created for certain assignees, indicating a time limit and a particular task description:



The architecture and the internal logic of 1FORMA are structured in such a manner that most of the system objects represent various tasks. An instruction for an employee to prepare a report is the task set by his immediate supervisor. An incoming document received by mail is the task set on behalf of the employee of a clerical office (a person registering a document) to an employee who is obliged to process the document. A calendar record for a meeting next week is the task set by a meeting initiator for himself. And even a record about the customer's company assigned to an account manager is also the task, not having an appointed assignee and a time limit.

A key feature of 1FORMA is the ability to effectively manage the company's tasks, relieving employees and managers from the need to «keep in mind» routine information, namely:

• When this project must be completed?

• Who received the task to arrange a meeting with the partners?

• Who is responsible for negotiating a bulk discount under the contract?

1FORMA relieves employees from necessity to spend their working time searching for the information they need in the system. If the data are entered into the system, the work aimed to streamline the information and to provide effective tools for monitoring and formation of user-friendly visual representations (aggregate or detailed data) will be performed automatically. Thus, employees are able to work with the maximum possible effectiveness for the business.

In 1FORMA contexts task is a minimum atomic (indivisible) meaningful work, which is performed by a responsible employee for the company benefit, the result of which may be checked. Task particularly is the constitutive essence of the 1FORMA System. With the help of tasks the data are collected in the system; orders and decisions of managers are recorded; work of assignees is initiated and monitored.

II Information structuring in the System

Tasks->Categories->Sections

Main and additional parameters of the Task

Task Route and Statuses

Category Content Analysis

Task Access and Visibility Restrictions

Search instruments

2.1 Tasks->Categories->Sections

When the number of tasks is increasing, the search of the required task becomes more difficult. Besides, it is often necessary to execute several tasks concurrently: statistics collection, report receipt, etc. In order to arrange a variety of tasks, they are grouped into **Categories** by specific functional features.

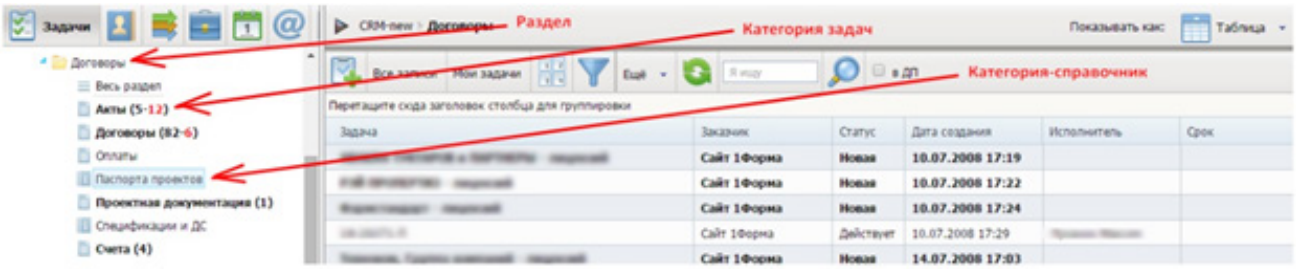
Each category has its unique settings that determine the task composition, rules of access to the task data and task route. Category setting is a difficult process and requires certain programming skills, so the categories are created and configured only by technical specialists.

A category is similar to a «lever arch folder» where only documents of the same type and printed on identical blank forms are kept. To create a document, a user opens a folder, takes a clean form sheet out and starts filling it up. A filled-up form is put into the folder again. In this case, a document is not only stored in it but also 'lives its own life", it can be viewed, changed and supplemented, assigned to an assignee, etc. All this time the document is kept in the folder, that is why it is easy to find it.

A breakdown of documents into categories is based on the «uniformity» principle, i.e. similarity of functions and properties. For example, in the «Invoices» category, tasks for invoice registration and approvals are grouped; in the «Commercial Proposals» category – tasks for work with commercial proposals, etc.

Grouping by category enables the user to make easier not only the task search, but also the task analysis. For example, it is convenient for a business unit manager to monitor a total number of tasks, the number of active, completed, overdue tasks, and to separate out the most important (prioritized) tasks.

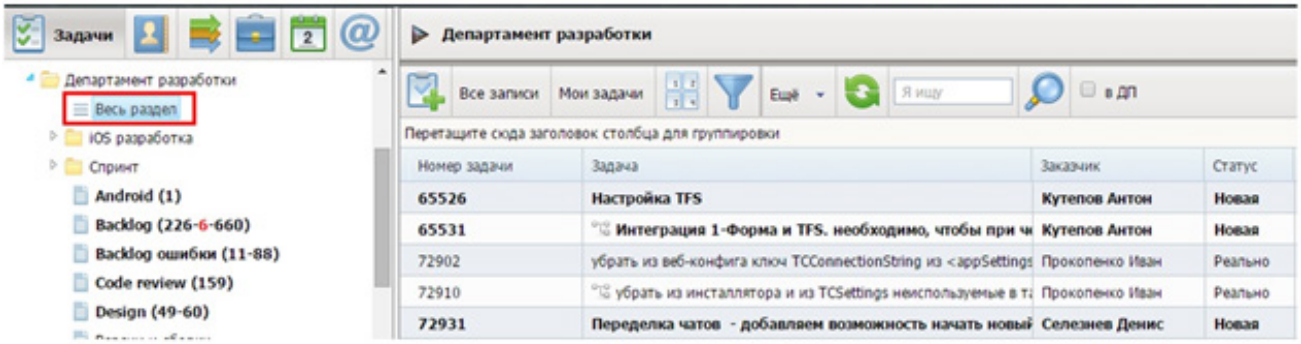
1FORMA allows configuration of different types of categories. Most often, common categories are used for tasks and assignments (represented by an icon and a reference category (icon). References usually contain the data used for processing of other tasks. For example, a Counterparty Reference contains details of Counterparty companies used for execution of contracts, invoices, work statements, etc.



Categories may be grouped into **Sections**. For example, the categories related to commercial activities, can be united in the "CRM" section, and the categories covering the company's internal operations are contained in "Operational Activities" section. If we go further with a lever arch folder, we may compare a section with a 'binder', where several folders are joined together. In this case, only documents of the same type are stored in each folder, but viewing through the entire binder is possible. For example, you can find all the documents related to a particular counterparty or the documents created by a particular employee. Doing so, the user does not need to view each folder separately: the search is made throughout the entire binder at once. Therefore, the sections enable viewing several business

processes in aggregate, having some "common points" (for example, the same client). That is why it is more convenient and efficient to group categories into sections based on business process commonality, interrelationship (not based on business unit coherence, for example).

To view the task throughout all section categories, the virtual folder "Entire Section" is used.



2.2 Main and additional parameters of the Task

Task is any job assignment performed by the employees within the scope of their activities, any communication between an employee and his co-workers (question, discussion, meeting), any external communication (interaction with customers, handling a problem, negotiations and presentations).

Despite a variety of tasks, they all have a universal set of **main parameters**, such as:

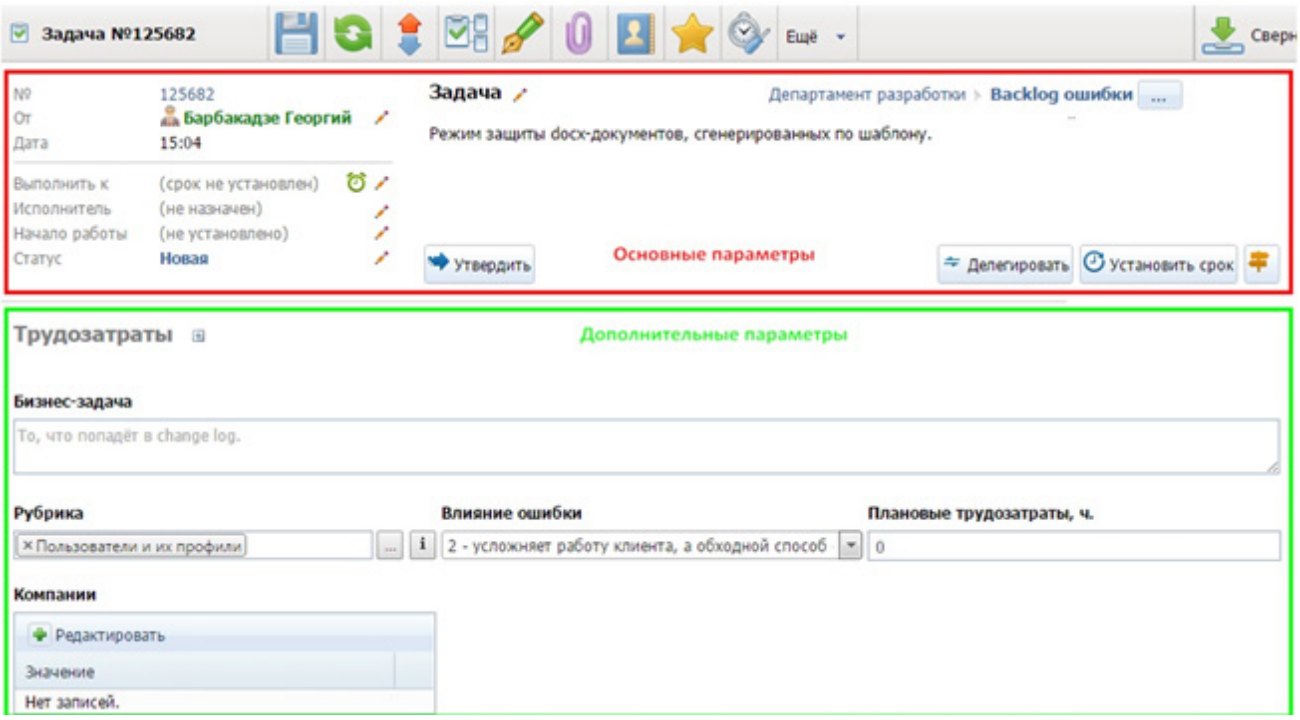
- unique task number;
- work giver (the field "From") is an employee who assigns a task;
- assignee (the field "To") is one or more employees executing task-related work;
- subscriber(s) is(are) one or more employees interested in task completion and monitoring the work progress;
- task assignment time;
- task accomplishment time limit;
- task title (a short definition);
- task status (allows monitoring task through a route).

The data attributable to a specific task category are stored in the **additional parameters (AP)**. A set of additional parameters, commonly, is unique for each category. For example, in the category "Commercial Proposals" the following AP can be customized: counterparty's name, contact person name and job title, amount, the attached commercial proposal file.

If we further pursue the idea of analogue between 1FORMA tasks and paper documents circulating within the company, the similarity is as follows. Documents (letters, memos, and reports, etc.) usually consist of two parts: a header section (heading) and content. In the header section the following is specified: document title and number, author, recipient (addressee), responsible unit, document preparation and processing dates, as well as resolution and signature. The content is the unique filling of a specific document: i.e., letter text, figures in report columns, list of goods and services in a customer's order, etc. The content is often formed according to a specific template (standard report, order form, etc.). Hence, the main task parameters correspond to the heading of the document, and additional parameters define the "template" of the content. The AP set is universal for tasks of the same category, however in different categories AP may considerably vary in their content and functions.

The "additional parameter" functionality implemented in 1FORMA provides a wide customization ability of application. For each company, each system implementation, a special unique set of tasks and additional parameters required for business process automation is developed.

The screenshot below demonstrates the areas of the main parameter and additional parameter layout.



2.3 Task Route and Statuses

A special execution procedure is defined for each task category in the company. It can be formally determined in job descriptions and other internal documents and it can also exist in the form of "unwritten rules". Anyway, when executing each category task, employees follow a prescribed procedure. In 1FORMA this procedure is called a task route. Actually, the **task route** describes a specific business process.

To monitor the task execution progress, a head of the unit and all involved persons need to understand, at what stage of the business process is the task at the moment. **Statuses** are used in 1FORMA to indicate the BP stages. In the course of task execution, as it advances along the route, the task takes different statuses, such as: New, In Progress, For Signature, Completed, Declined, etc. As a rule, achieving the next stage each time is associated with a change in the task status. 1FORMA has a standard status set, which can be expanded and supplemented by an unlimited number of statuses according to specific company needs.

The task route is displayed in the form of a diagram, where rounded rectangles correspond to the task statuses, right-angled (normal) rectangles – final statuses of the business process completion (a green rectangle means successful completion and a grey one means unsuccessful). The current task status is marked with a green contour. There cannot be repeated statuses in the same route, that is why the current task status unambiguously characterizes its on-route position.

A typical route in the 1FORMA System looks like this:

Category task route

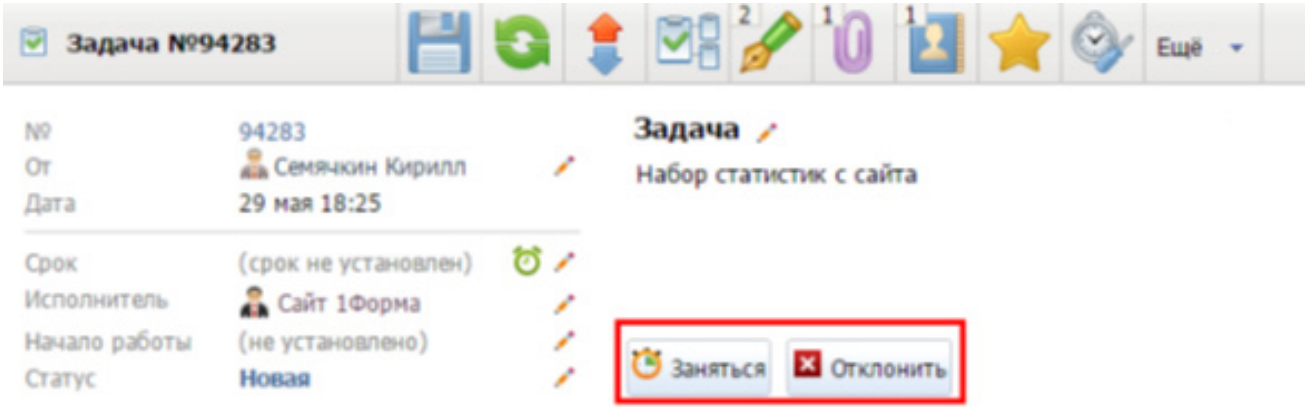
The finalized routes may contain any other statuses and automation elements:

Category task route

Pictograms next to the arrows indicate that some additional actions are executed when the task is transferred. For example, the pictogram means that obtaining a signature of a responsible person is required at this stage (it can be a task giver, unit manager or another employee, depending on the system configuration) to continue the process.

This pictogram means that at this stage the sub-tasks are created. The arrows in the route diagram indicate the actions advancing the task to the next status. The names of these arrows correspond to the names of the buttons located in a task card next to the "Status" field. By clicking one of these buttons, the task is changed to the relevant status. The buttons apparently provide hints to the user, what actions are expected from him, and what actions will take place with regard to the task in this case (besides, pointing a cursor over a button highlights a hint).

Category task route



Depending on the employee's role in a specific task, a set of his available buttons (even for the tasks of the same status) may be different.

2.4 Category Content Analysis

A category contains all tasks for the specific business process. Hence, when viewing a category, it is possible to estimate quickly:

• total scope of work (quantity of active tasks);

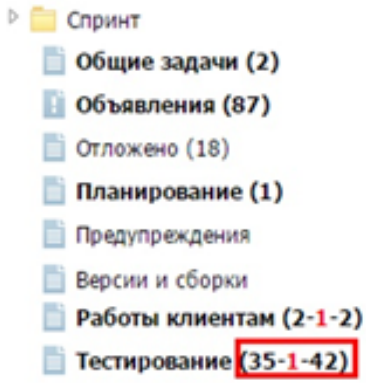
• overdue tasks – if any;

• current workload of employees involved into this business process (number of tasks at the execution stages, each assignee's tasks), etc.

Various indicators, filters (task selection conditions) and category display ways are convenient to use for this.

Task Number Indicators

In the left part of the screen, in the category tree, the indicators representing quantity of tasks are displayed. The indicators are customized by a technical specialist and can display, for example, the total number of tasks in the category, quantity of new tasks, overdue tasks, etc. Such indicators enable the user to estimate the overall status of work and identify the most challenging business processes.

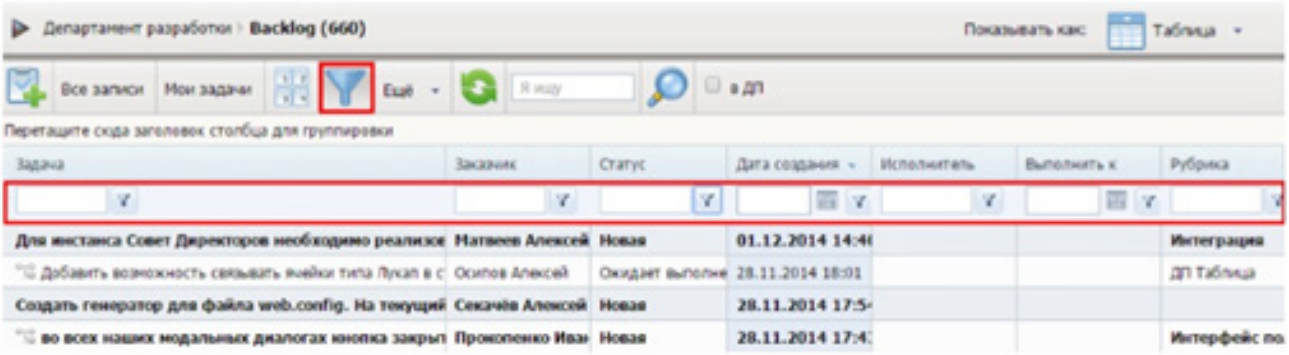


Simple (ready) filters

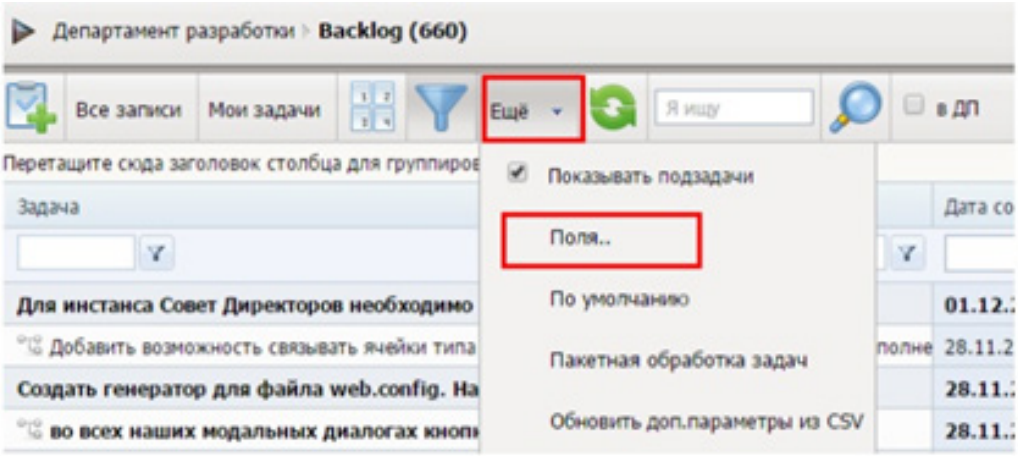
A task list is displayed in the right part of the screen in the Category or the Section. If many tasks are assigned, it is very difficult to find a required task (several tasks) in a common list. Using the button Мои задачи (**"My Tasks"**) on the control panel, a user can choose from the common list and leave for viewing only the tasks, where he acts as a work giver or an assignee. By default, only active tasks (new tasks or in execution status) are displayed in the list. Using the button Все записи (**"All Records**") the archived (completed) tasks are also included into a common list.

Complex Filters

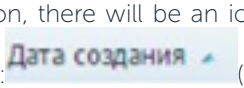
A more powerful tool is filtering activated by the button . Using it, tasks can be filtered practically by any parameter: a work giver, assignee, status, time of creation, time of execution.



If the original table does not contain any field to be selected, it can be added:



Sorting

A task list (a filtered list or common list) can be sorted according to the column values displayed on the screen. Just click the column heading. If the sorting is on, there will be an icon next to the column title showing the sorting direction (in ascending or descending order): 

("**Creation Date**"). To change the sorting direction to the opposite, just click on the heading. The next click can cancel the sorting. For example, this is suitable for viewing the most recent or oldest tasks.

Column Sequence

To obtain the list in the form familiar to or convenient for a specific user, the column sequence can be changed. Just drag a column title to the required table area.

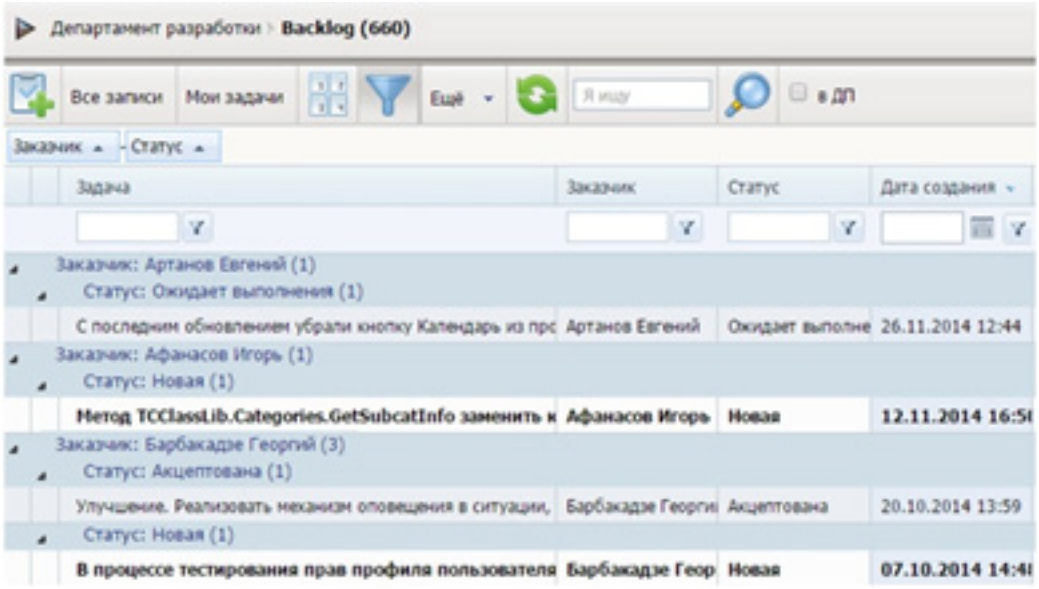
Grouping

A task list can be analyzed in various sections with an interim result. For example, a list of overdue tasks can be formed in a category and grouped by assignee, to determine which employee manages his assigned work the worst.

A task list can be grouped by work giver to determine who provides the main workload, or analyze, whose tasks become overdue most often (probably, it will help to persuade a work giver to adjust a time limit when setting tasks in the future).

To group the list by any field value, just drag a heading of the relevant column to the top:

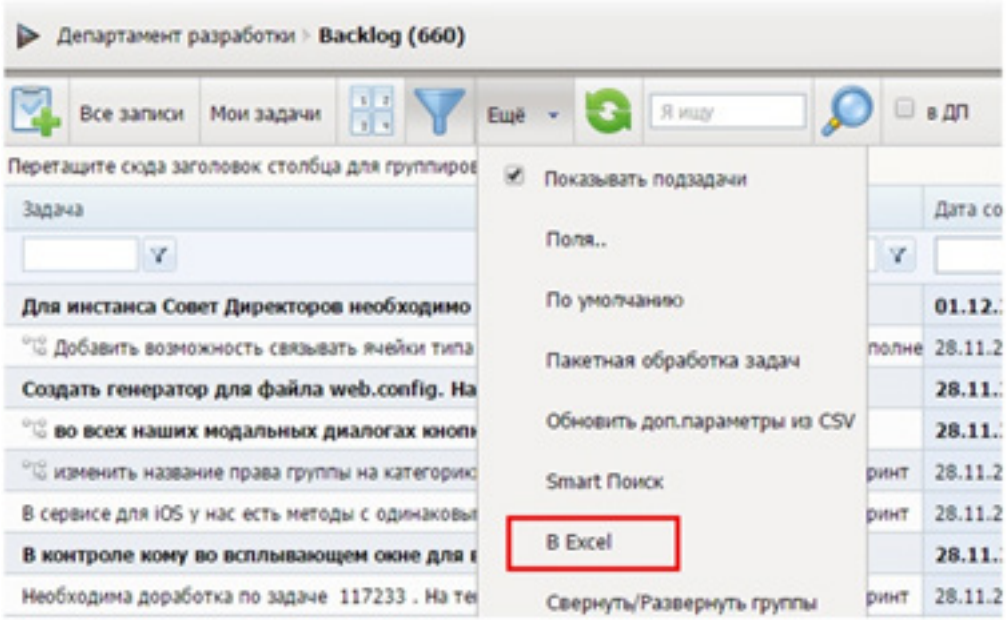
A grouped list looks like this:



Grouping function can be engaged, if you drag several field headings to the top and place them in the required order. To cancel grouping, remove (drag) a column heading from the upper field.

Export into Excel

For additional processing of a task list (for example, for calculating an aggregate index for corporate reporting or special list generation) a task list can be exported into Excel and further analyzed in an electronic table. The data will be exported exactly in the form they are displayed in the list (i.e. the list can be exported, sorted and filtered in advance). For example, it is convenient for meeting task register generation, preparation of document printing for particular case, etc.

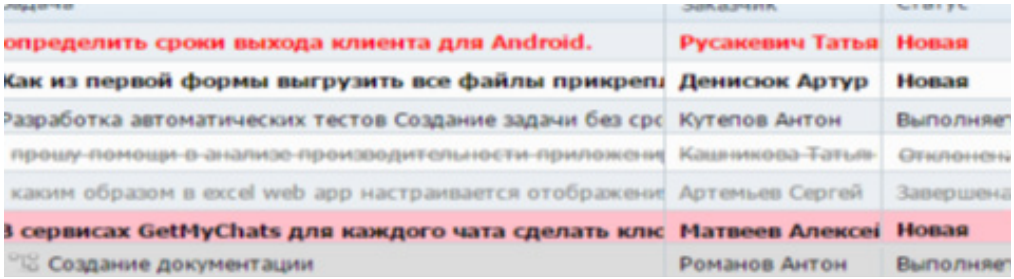


Representation Forms: Table, Data Stream etc.

All the above listed tools (selection, sorting) belong to the most widely used way of category representation in 1FORMA, in the form of the Table. A Table is the most systematized and manageable data representation in the system. Additional information is contained in the displayed form of each table row:

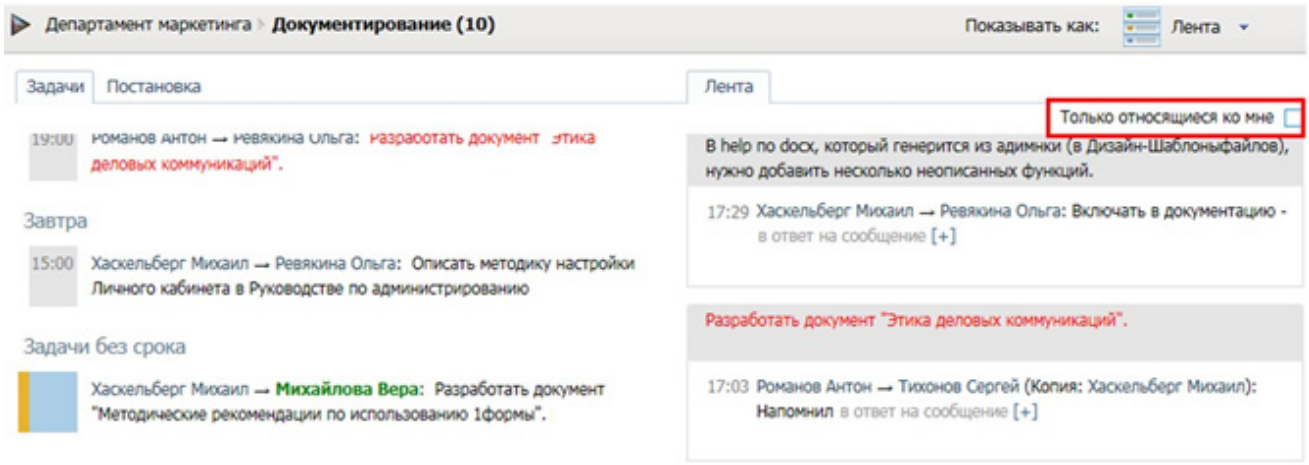
• overdue tasks are displayed in a red font;

- new tasks not yet accepted for work are displayed in bold type;
- tasks under execution are displayed in a normal font;
- unsuccessfully completed tasks are displayed in a grey strikethrough font;
- successfully completed tasks are displayed in a grey font;
- high priority tasks are displayed on a red background;
- low priority tasks are displayed on a dark-grey background.

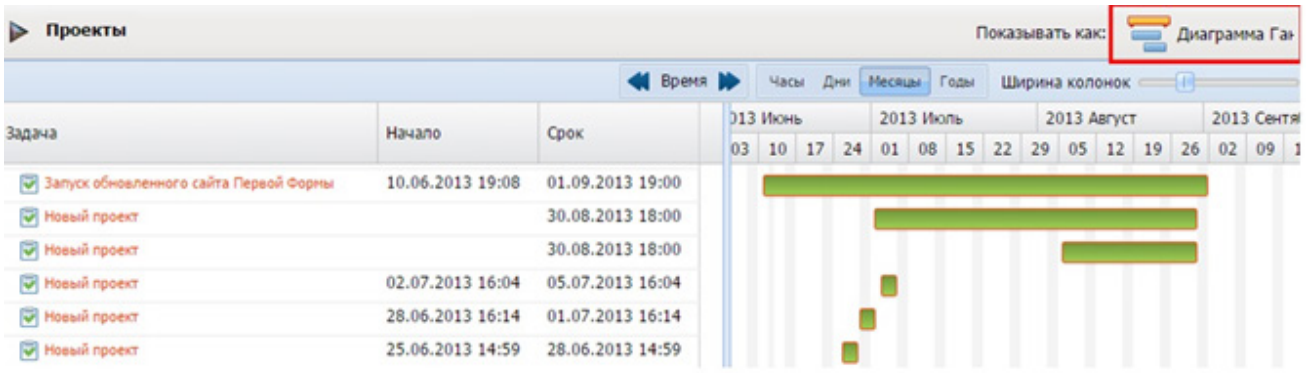


However, there may be necessary to look at the company's business process from a different perspective. For example, if a manager wants to see, what recent activities have been on the task, and which tasks his employees have worked on, the "Stream" representation can help him.

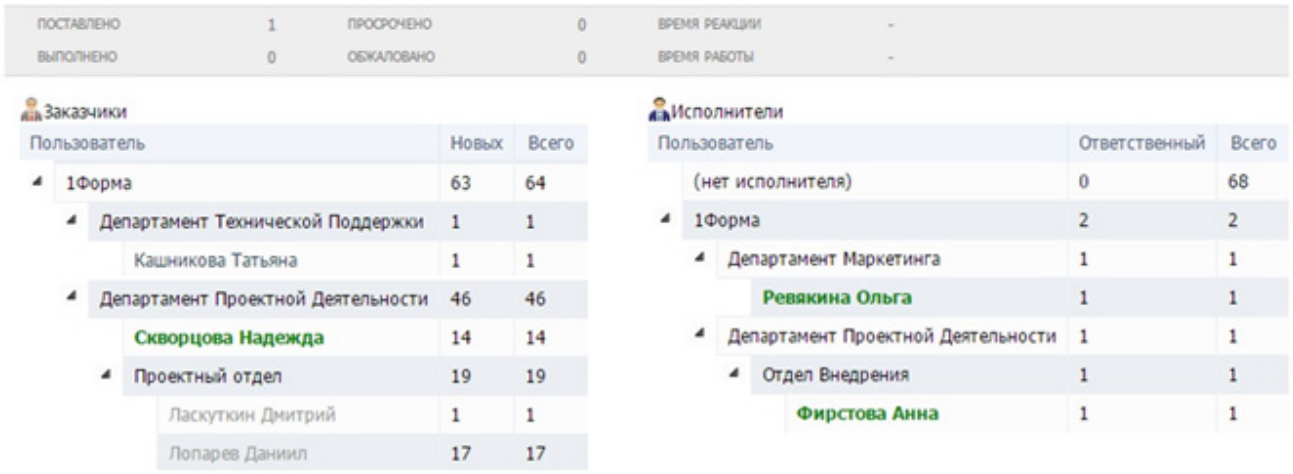
The "Stream" representation consists of two parts: task stream and comment stream (feed). The task stream chronologically displays the tasks relating to the specified category or section. The comment feed chronologically displays the comments added to these tasks. The user can choose only the comments related to him personally, and by doing this, clean the unnecessary information out of the window.



Using Gantt Chart, the task volume and progress of concurrent tasks can be assessed to ensure an adequate planning of resources



The Task Summary is particularly useful for managers of large business units, who would not go into details of separate processes and tasks and who need a general idea of a current situation:



ПОСТАВЛЕНО	1	ПРОСРОЧЕНО	0	ВРЕМЯ РЕАКЦИИ	-
ВЫПОЛНЕНО	0	ОБЖАЛОВАНО	0	ВРЕМЯ РАБОТЫ	-

Заказчики

Пользователь	Новых	Всего
1Форма	63	64
Департамент Технической Поддержки	1	1
Кашникова Татьяна	1	1
Департамент Проектной Деятельности	46	46
Скворцова Надежда	14	14
Проектный отдел	19	19
Ласкуткин Дмитрий	1	1
Лопарев Даниил	17	17

Исполнители

Пользователь	Ответственный	Всего
(нет исполнителя)	0	68
1Форма	2	2
Департамент Маркетинга	1	1
Ревякина Ольга	1	1
Департамент Проектной Деятельности	1	1
Отдел Внедрения	1	1
Фирстова Анна	1	1

2.5 Task Access and Visibility Restrictions

For different users, access to individual tasks and categories is determined by settings of a specific 1FORMA application. These settings may vary over a wide range. However, the general principles should be the following:

• access may be granted **at the category level** (configured by a technical specialist). In this case, all rights provided to a user apply to all tasks of this category. For example, this way the access is provided to the system reference guides, such as the cost classification, the region list. The rights to view these references are granted to all users;

• access may be granted **at the task level**. In this case, the rights provided to a user depend on the user's role in a particular task (task giver, assignee, acceptant, manager, administrator). For example, in the category of requests to the technical support service, the user is granted a right to view only the applications, where he is a task giver or subscriber;

• access may be granted **at the task parameter level**. For example, the user can edit only the specified APs;

• access may be granted **at the task level depending on the specific parameter values**. For example, in the Counterparty reference guide, a manager has access only to the records relating to the specific region. Such access is customized using a tag mechanism.

A user can be granted the following rights:

• task viewing,

• giving comments,

• making changes,

• execution,

• signature (acceptance),

• time extension,

• assignee change,

• task giver change.

Most settings relating to access rights are customized by technical specialists. The users can control other users' access rights only by changing their roles in a specific task. For example, an employee can appoint one more assignee or subscriber for his task or request a dynamic signature, and then an "invited" employee will obtain the right to work with this task or view it.

The system regularly monitors compliance with the rights, regardless of actions executed by the user at the moment. For example, if the user is viewing a common task list in the category, he will see only the task according to his viewing right. The other tasks will be automatically hidden.

Encryption

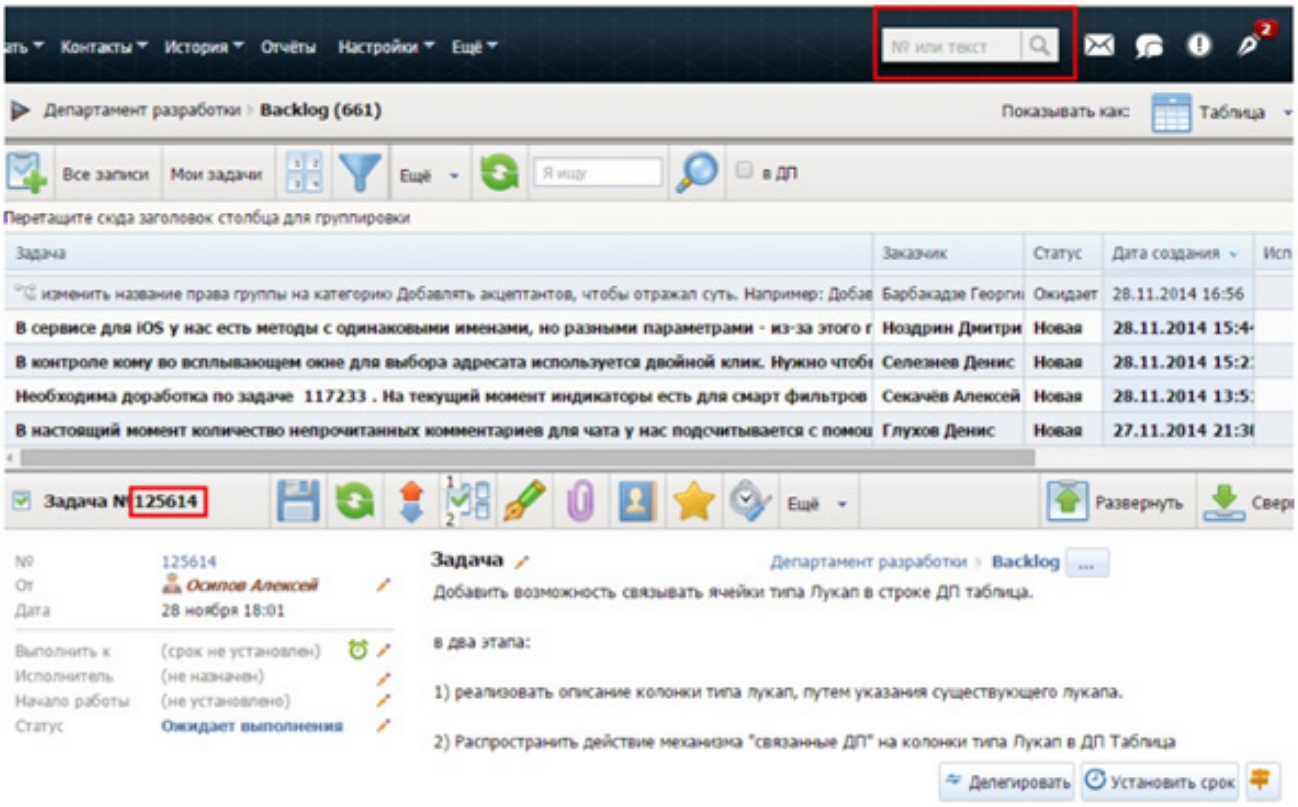
Information can be hidden from a user not only because he has no viewing rights, but also because this information is encrypted (for security or business secrecy reasons). An encryption mode can be customized at the category level and individual task level. The encrypted tasks are marked with the icon. The encrypted tasks and related comments are not displayed for the users without rights to view encrypted tasks.

2.6 Search Tools

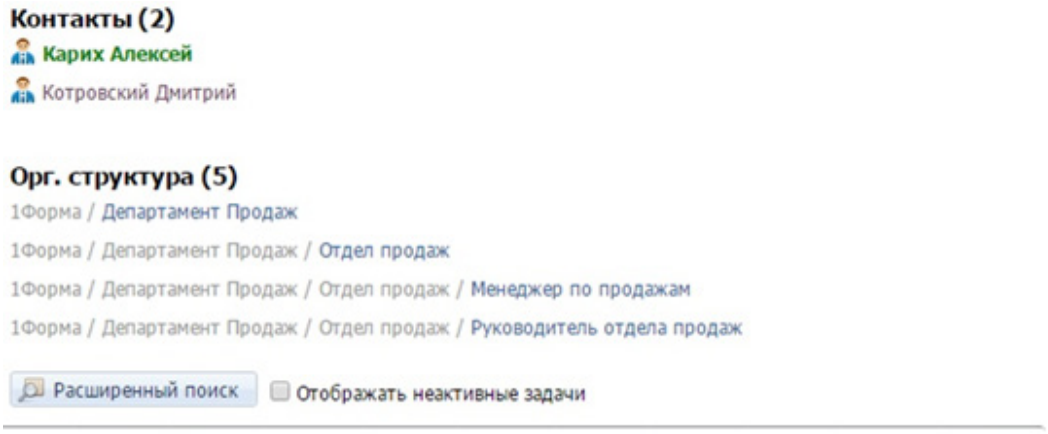
1FORMA offers several convenient tools for search of required information.

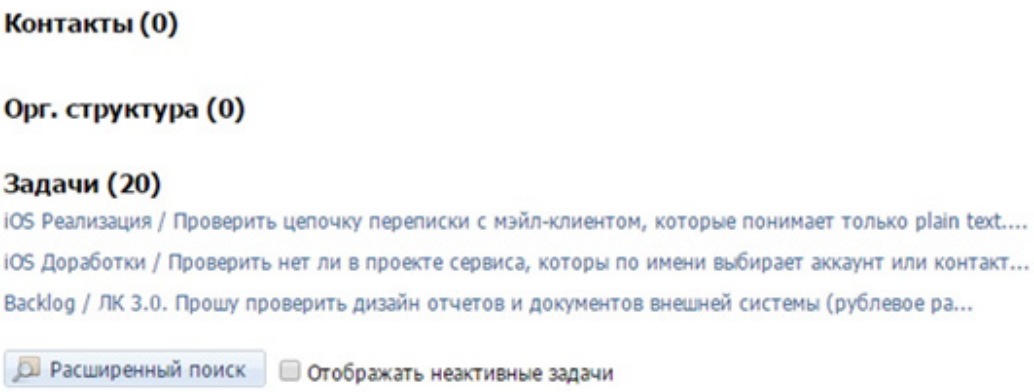
1. **Search by a number** is the most convenient way of task search.

Each task has its unique number. The user can inform his co-worker of the required task number, and the latter can go to this task card immediately. Just enter the task number into the search field and press Enter (if you press Ctrl + Enter, the task opens in a new browser tab). This method is useful when employees plan joint work on their shared task



Using the same quick search field, search **by task text or contact database** can be made:



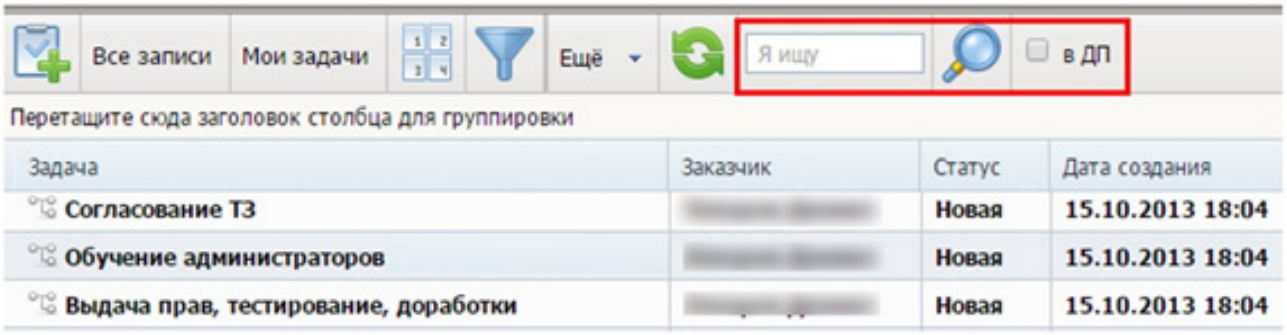


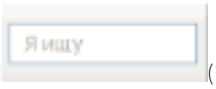
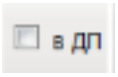
2. List Search

Tasks are often easy to find in a common list, if the search area is narrowed in an appropriate way. First of all, it is required to determine the category (business process) that the task refers to. Then, viewing a category task list, use filtering and sorting tools. For example, if the user knows the task giver or its current status, the relevant filters will considerably reduce the displayed task list.

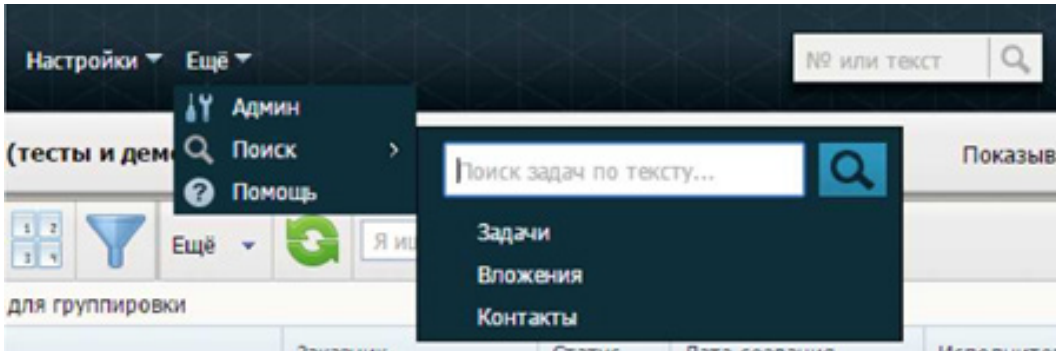
3. Context search

If the user does not remember exact parameters of the task, i.e. a task giver, date, status, etc., the context search is possible – search by a word combination in the task text or by additional parameters. For example, a user may remember the last name "Vorobyaninov" was mentioned in a comment to the task, so it may become a search key.



In the field  ("**I am searching**") a string for search in a task text or in the APs (if the setting  ("**in the APs**") is active). Using the icon a string for entering the search condition can be displayed.

4. The most powerful search tool – Extended Search



It helps not only to make a search in a task text but also using task additional parameters, attached files, and contact details (for example, e-mail). The search is described in the User Guide in details. However it is recommended to use as the last thing, when other search tools have not produced any results. The extended search deals with very large quantities of data, and, therefore, requires very careful settings, otherwise the user will obtain too much "unnecessary" information in the search results and that will not be helpful as expected.

III Task Setting and Execution

Task Setting

Assignee Selection and Appointment

Task Acceptance for Work (Execution)

Work with the Task

Follow-up

Task Interrelations

Task Work Completion

3.1 Task Setting

When there appears a new opportunity for business development, or a problem arises, a relevant business process should be launched. For this purpose, the task is to be registered in the 1FORMA System. Tasks are entered into system in different ways:

• a task may be set "f**rom outside**" (transferred from another unit or set by the management);

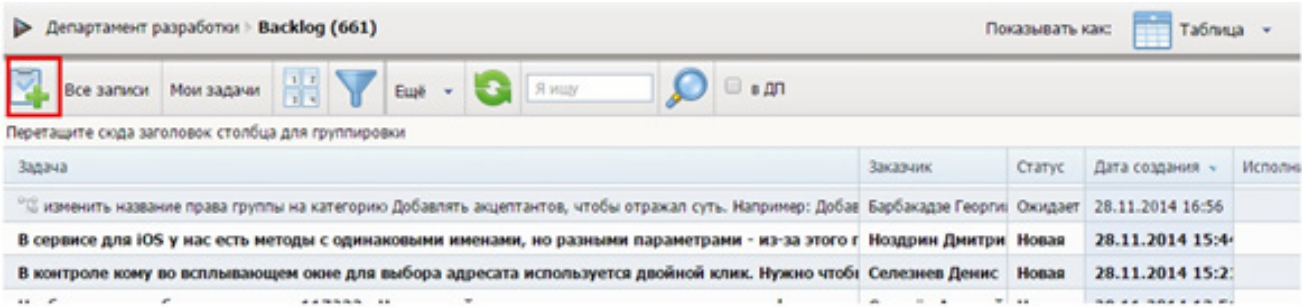
• a task may appear **as a part of a standard business process** (for example, during document package formation, an individual task may be set for approving one of the documents);

• a task may be set by an **employee himself** (for example, after getting a manager's oral instruction, the employee has to record it in the system).

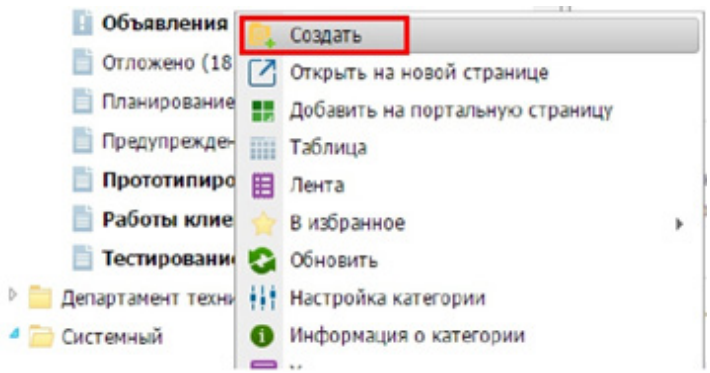
When setting a task, it is important to determine which category (what business process) it refers to. Otherwise, there may be a situation, where the employees concerned will not see the task and will not begin its execution. When determining a relevant category, better to rely not on a task title or document name but on the essence of the process (for example, a task to order an entry permit may be required to register in the "Secretariat" category, request for recruiting a new employee – in the "HR Tasks" category, etc.).

A task can be created in 1FORMA in three ways:

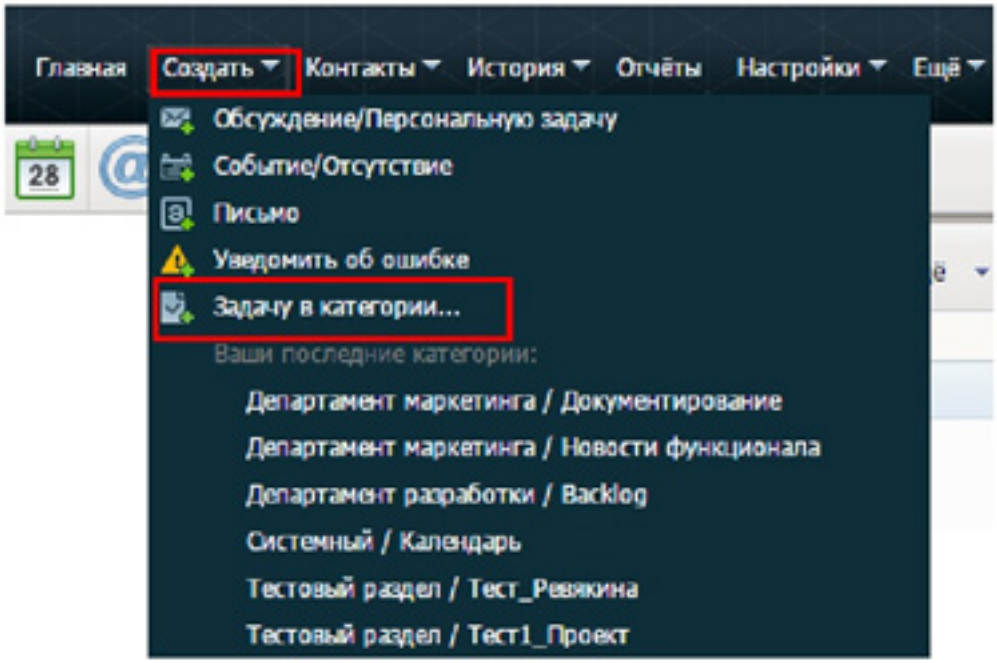
• from a common task list of the required category



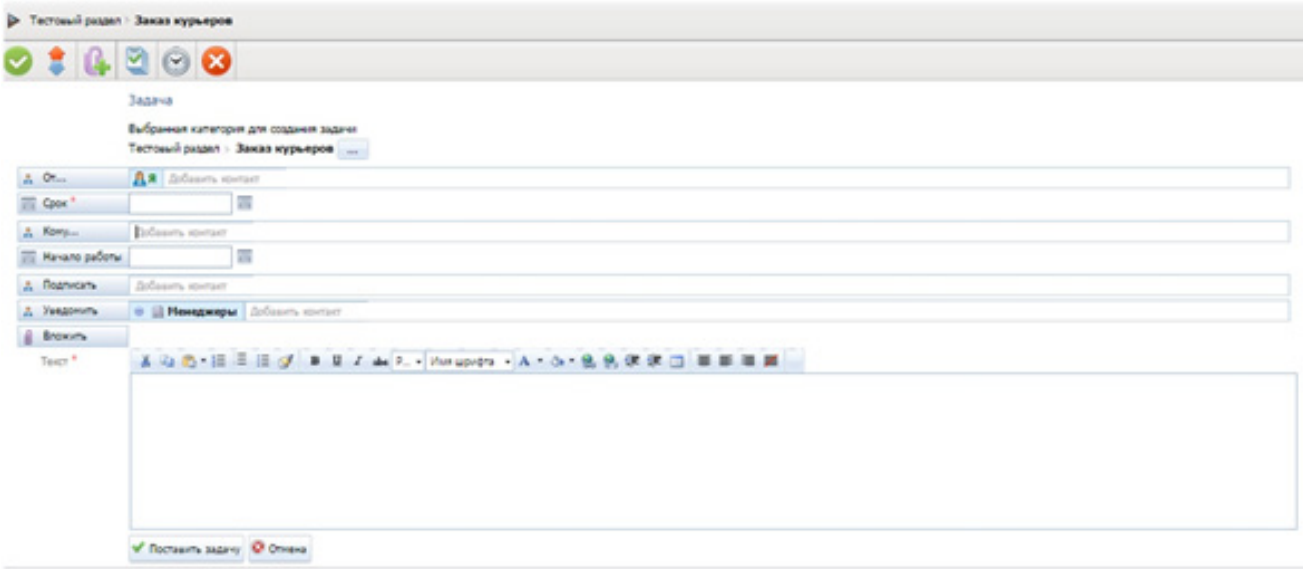
• from a context menu of the category (by right-clicking on the category name)



• from a common menu



The composition of new task fields varies depending on the category. The fields marked by (*) are mandatory for filling-up. The rest fields may be filled later, in the course of work with the task.



After clicking the button "Set the Task" or icon , the task is created in the specified category and appears in a common list. In most cases the task gets the status "New" when it is created (unless otherwise is set during specific business process automation by a technical specialist).

3.2 Assignee Selection and Appointment

Any task can be executed only when it has an assignee. An assignee is the person who is responsible for the proper, timely and complete execution of the required actions.

As a rule, assignees are appointed based on their job positions in the unit, taking into account their area of specialization (if any) and current workload. For example, a technical support employee must remedy a technical failure. If the task requires special knowledge, it will be entrusted to the employee with the required competence. If the task is large and complicated, its execution may involve several assignees, one of them will be responsible for entire work performance. Simple tasks will be allocated by a unit head to its employees. In small units, the employees may distribute their tasks by themselves: a new task will be accepted by the one with the least workload.

All the following options are implemented in 1FORMA application:

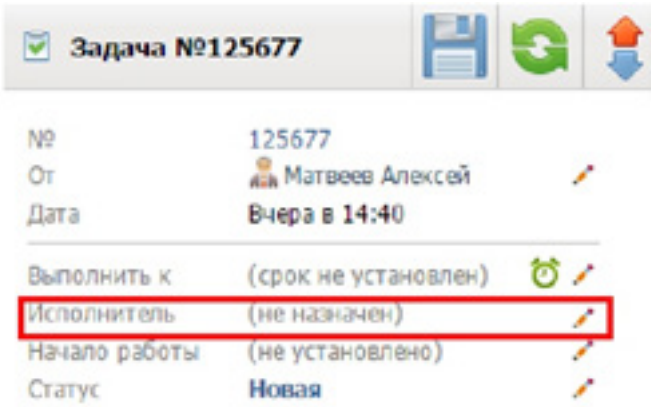
• a task assignee can be appointed **manually** or by a task giver, or by a head of the relevant unit, or by another employee with the appropriate authority (for example, a coordinator or dispatcher);

• a task assignee can get an **automatic** appointment in accordance with the specific parameters of a business process (for example, equipment repair request will be assigned to a technical support unit, a request for return of signed waybills - to the manager who is responsible for work with this customer)

• an assignee **individually** accepts the task for work (for example, a contract made by the company is submitted to the legal affairs department for approval, and the contract is accepted for work by any lawyer of the department).

Correct and timely filling-up of the parameter "Assignee" ensures clear understanding of employees and managers responsible for specific task completion.

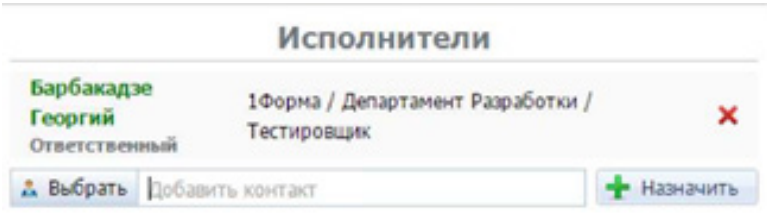
To appoint an assignee, click the pictogram next to the relevant field.



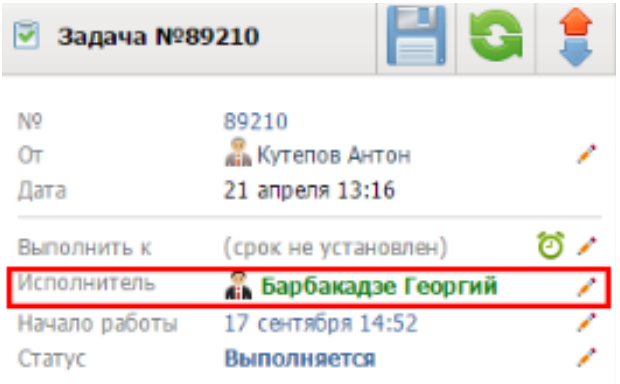
Then a window with the "Assignees" block will open. For new tasks, this block will be empty:

To select the required employee, start entering his last name into the "Add Contact" field (the system will automatically offer appropriate options) or click the "Select" button (then the employees list window will open).

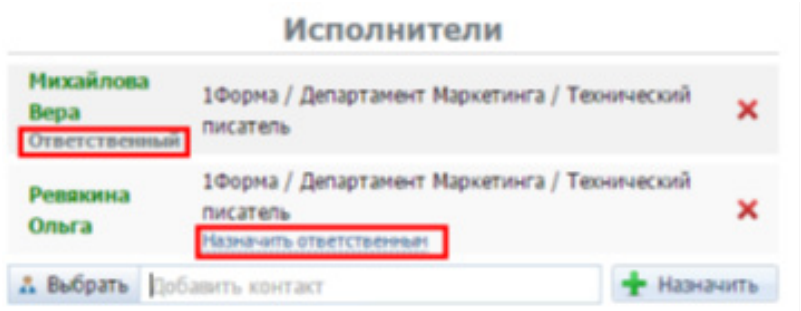
To confirm the choice, press "Appoint" button, and this employee will be added to the assignees list: If you are an assignee, enter "me" in the field "Add Contact" and press "Enter".



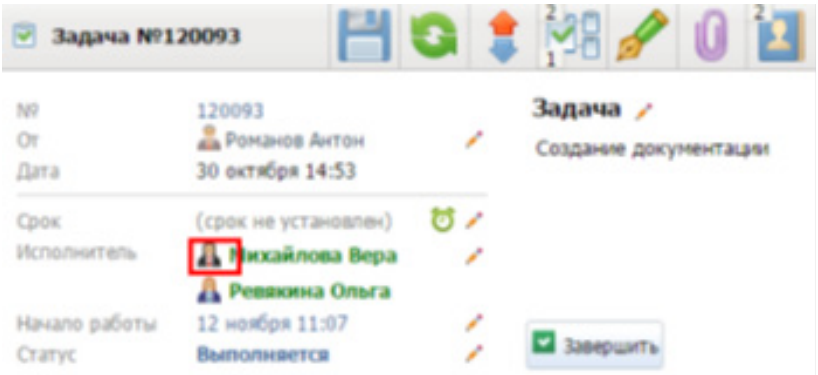
The appointed assignee is displayed in the task card:



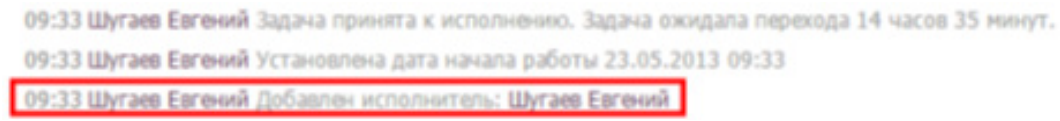
If the task has several assignees, one of them is appointed as a responsible assignee.



In the task card, a responsible assignee is always mentioned first in the task assignee list, and his pictogram is different from others:



Upon appointing an assignee, a respective comment is automatically made in the task:



At the same time, a notification message is sent to the employee appointed as the assignee. In this case a comment counter in signal indicator of the right upper corner of the screen increases a number:

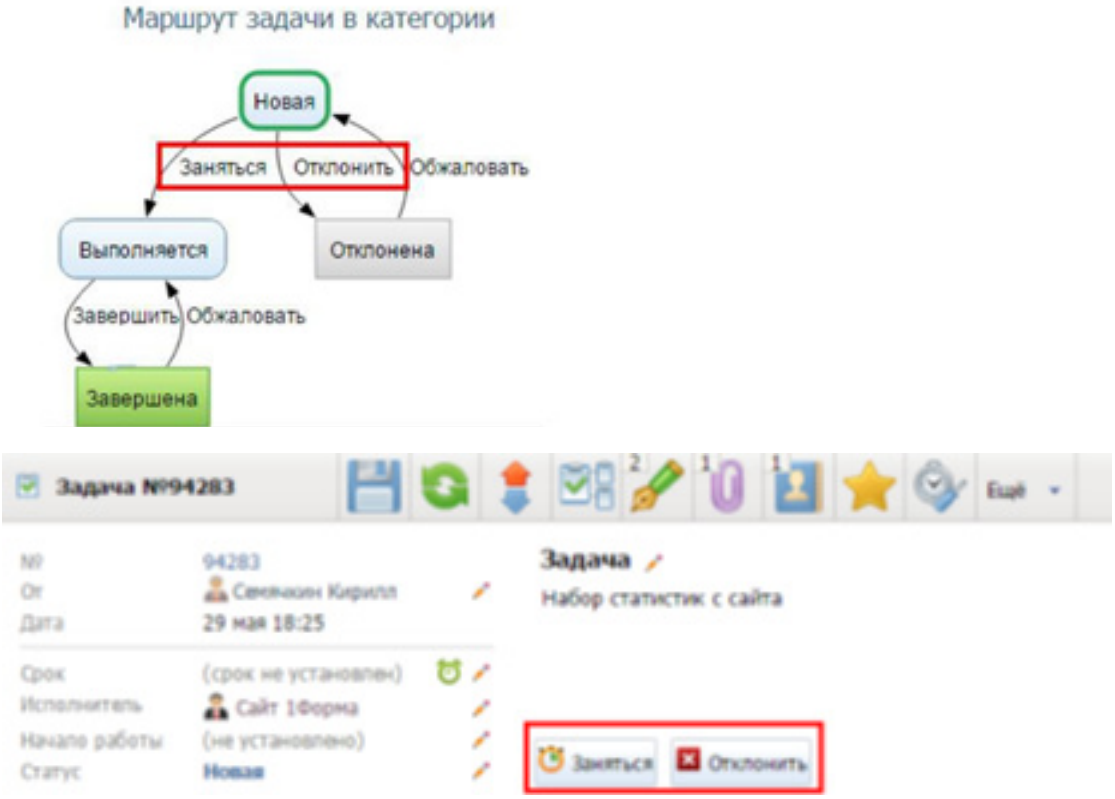
3.3 Task Acceptance for Work (Execution)

For effective performance by employees and work supervision by unit heads, all of them need to know the current task status. It is required in order not to miss new task appearance and to keep the established completion terms for the tasks under execution.

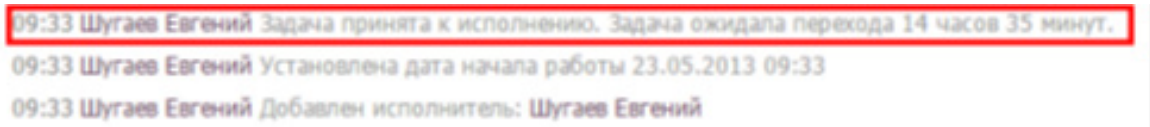
Task statuses are used in 1FORMA for business process monitoring. As a rule, at the moment of its creation, a task is given the status "New" (unless otherwise is customized during specific business process automation by a technical specialist). It means that the assignees have not begun the task execution yet. When the employee accepts the task for work, he has to click one of the buttons in the task card. Then the task moves to the next route stage and changes its status.

To accept the task with a standard route for work, click the button "Begin", and the task will move to the "Under Execution" status. Titles may be different on other changed routes.

Task route in the Category



When the task is accepted for work, the system automatically generates an appropriate comment, and a notice is set to a task giver.



3.4 Work with the Task

Data Entry

Work with Attached Files

Recording of Labor Costs

Task-Related Internal Communications

Notices

Reminders

Time Change

Assignee and Subscriber Change

Delegation

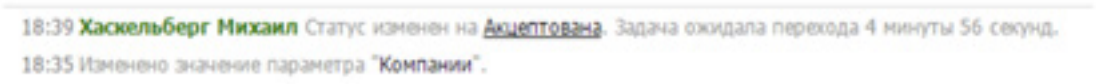
Task Decision Making

3.4.1. Data Entry

The system of 1FORMA is designed for the everyday work of ordinary employees, their managers and the company's In the course of task execution, the assignees enter information and attach files to the task. This leads to changes in the values of main and additional parameters. User's capabilities for work with a specific task depend on the application settings.

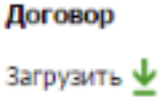
A task card has an intuitive interface, that is why, in most cases, entry of information does not involve any difficulties. The values entered into the task fields (parameters) should correspond to their type. For example, a user cannot enter text or upload a file into a numeric field.

Full history of each parameter, including attached document (file) versions, is saved in the task. The history can be viewed in the section "Comments".

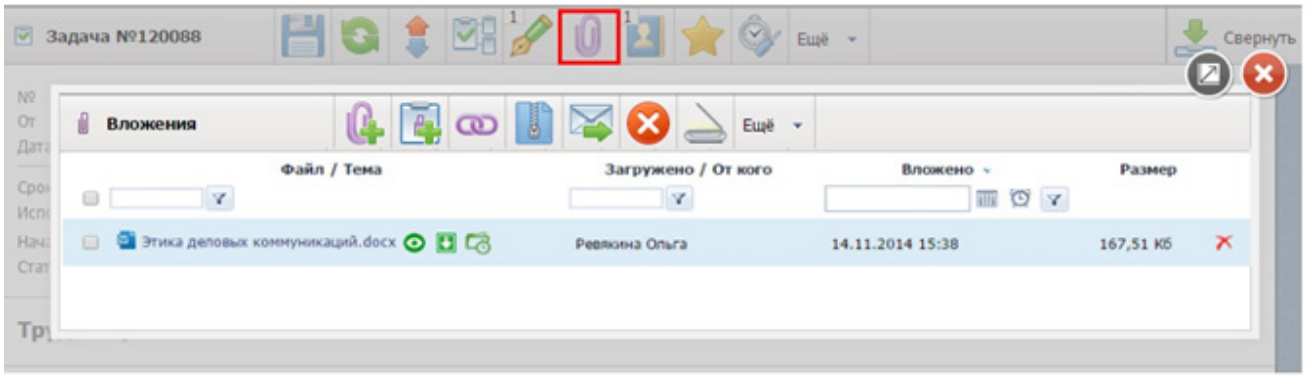


3.4.2 Work with Attached Files

If the task has to contain (or usually contains) a file with specific content, it is better to use AP of the type "File". For example, a scanned copy of a filled-up standard questionnaire is usually attached to the task of the category "Applicant Questionnaires". A special AP is created for this purpose:



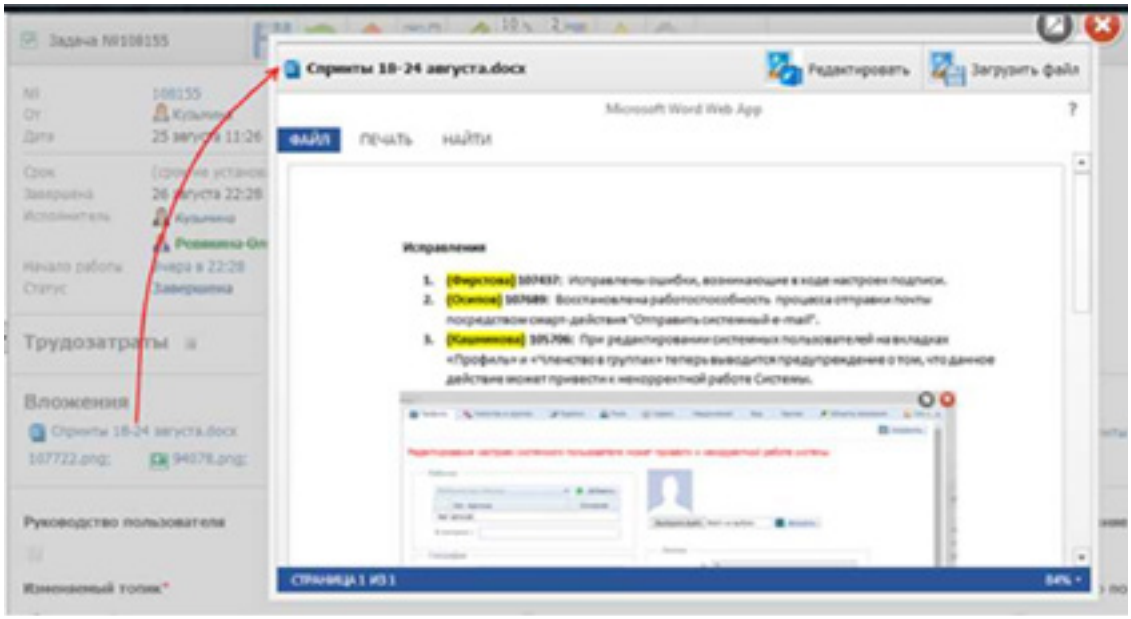
If a task does not previously specify the exact number of files with arbitrary content, the tool "attachments" is used (for example, if an applicant has submitted letters of reference, diploma copies, portfolio, etc., enclosed with a questionnaire):



Comments are also useful for file attachment, so only the concerned task subscribers are informed on the enclosed file, but not all task subscribers.

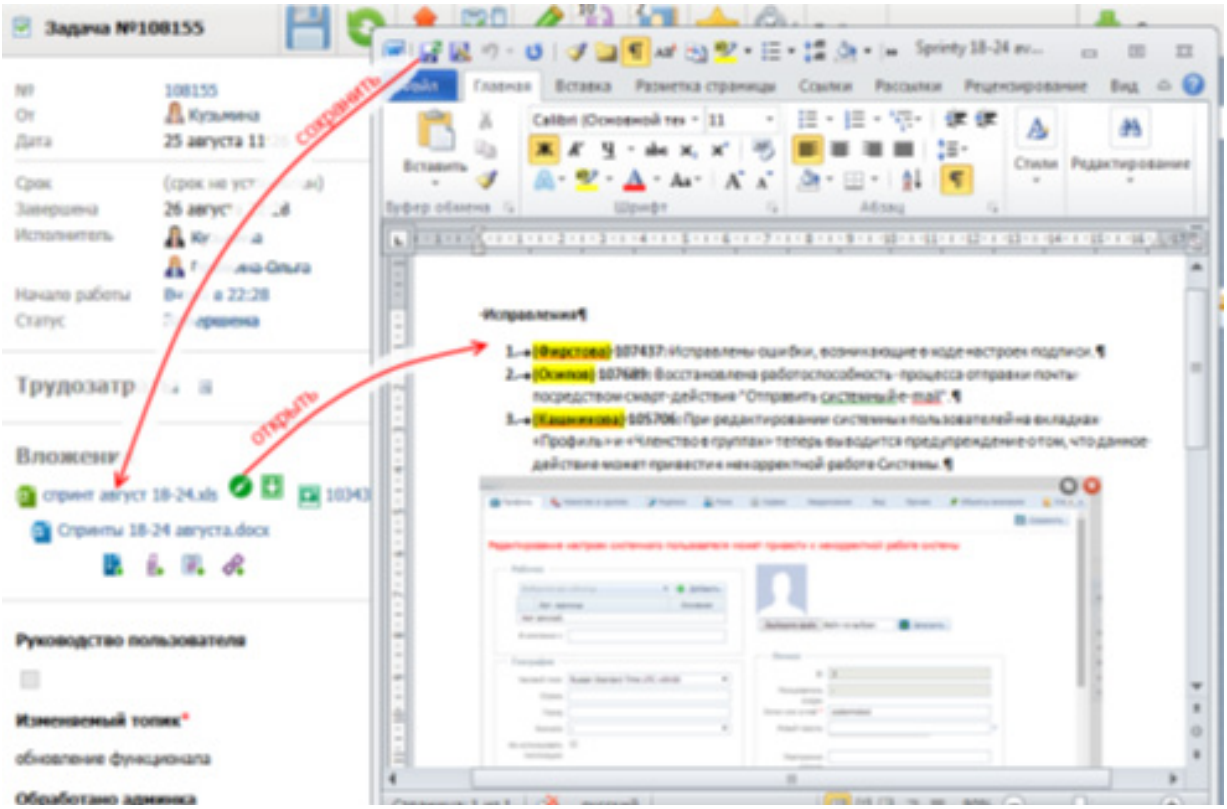
For viewing and editing the attached files there are several options:

1. To view or edit Word documents (doc, docx), electronic tables (xls, xslx), presentations (ppt, pptx) or images (jpg, png, gif) directly in 1FORMA interface, WebApps technology may be used:



This technology application supports any devices providing access to 1FORMA, including tablets and phones using iOS and Android platforms.

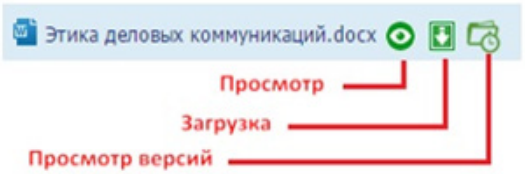
2. WebDAV technology is designed for easy editing of documents. Using it, any document stored in 1FORMA can be opened in a common office application directly from a browser window, with no need for its download to a computer disc. After making changes, the user clicks the button "Save" and the document is automatically downloaded into 1FORMA, also with no need for saving to the disc:



During editing a document, using WebDav technology, versioning is preserved: each saving is recorded as a new version of the document, which is possible to return, if required.

3. A file may be saved to the disc and processed in a standard mode, and then uploaded to the task or AP again.

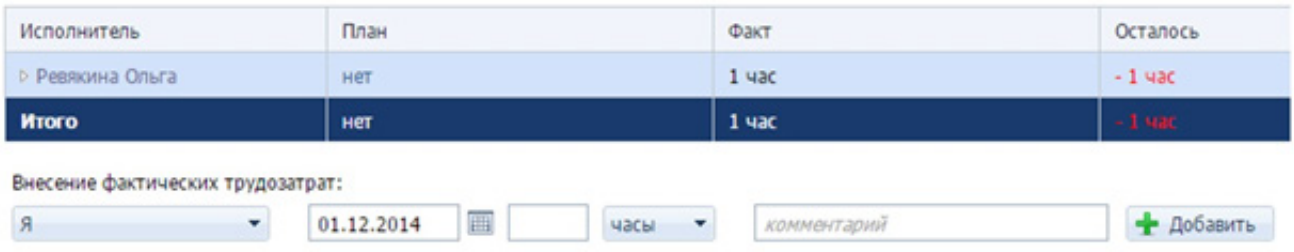
All these options are available by clicking the file name displayed as a link, or related icons popping up by pointing a cursor to the name.



Each technology (WebApps or WebDAV) is opened by default, i.e. by clicking a file name it is determined in the application settings. These settings can be changed only by a technical specialist.

3.4.3 Recording of Labor Costs

In some companies and business units, labor cost records are kept in terms of processes and projects. In such cases the employees must regularly enter their labor costs for each executed task.



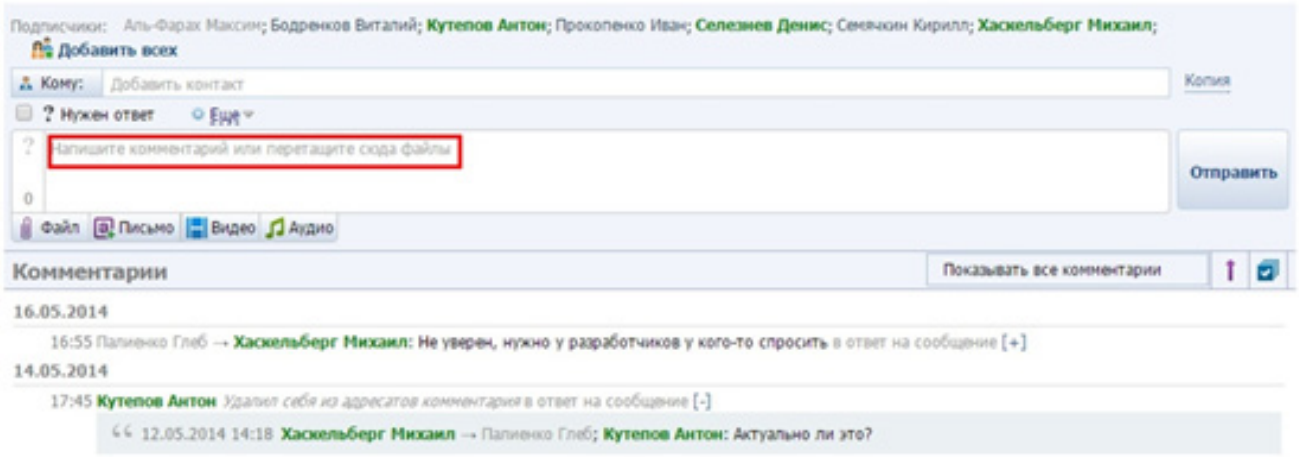
Based on this data managers analyze the correspondence of planned and actual labor costs, estimate the employees' workload and performance results. For example, labor costs data are used during generation of such reports "Project Labor Costs", "Timesheet".

3.4.4 Task-Related Internal Communications

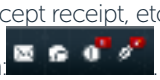
Questions requiring discussion often arise during task execution. To make reasonable decisions on these questions, the entire discussion process, all arguments of the participants and all additional information (documents, screenshots, links, data) are required to be collected in the same place and convenient for viewing. In 1FORMA the section "Comments" at the bottom of the task card is used for this purpose.

Using comments the responsible persons can control who and when took any action on the task and identify the causes influencing the process progress (for example, when the document was downloaded, who changed the data, who made any proposal, when and for what reasons it was accepted or declined, how many document versions were prepared in the course of approval, etc.). Even in case of assignee change (for example when the employee is dismissed, on a sick leave or vacation) the task still preserves a complete description of executed works, plans, notes, as well as an entire set of related documents. It helps to continue the work without a loss of work rate and quality.

Users can send comments to a chosen employee (one or more) or to all employees who follow the task execution progress (subscribers). Comments also contain the messages automatically generated by the system in case of task status change, signature request, etc. Comments can be sorted, marked with a different color, entered into the "favorites", hidden (comments of a specific type).

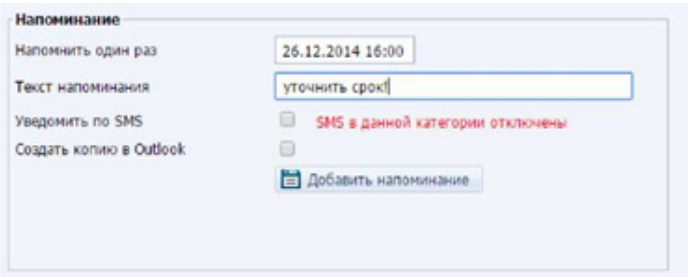


3.4.5 Notices

Upon the execution of significant actions (for example, time change, assignee appointment, task acceptance for work) simultaneously with relevant comments generation, the system automatically sends notifications to the interested employees. For example, a task giver will be immediately notified about the acceptance of his task for execution; an assignee will be notified of accept receipt, etc. It is convenient to follow notice receipts by viewing signal indicators in the right upper corner of the screen  . Due to the automatic cross notification mechanism, employees can effortlessly follow their task processing progress.

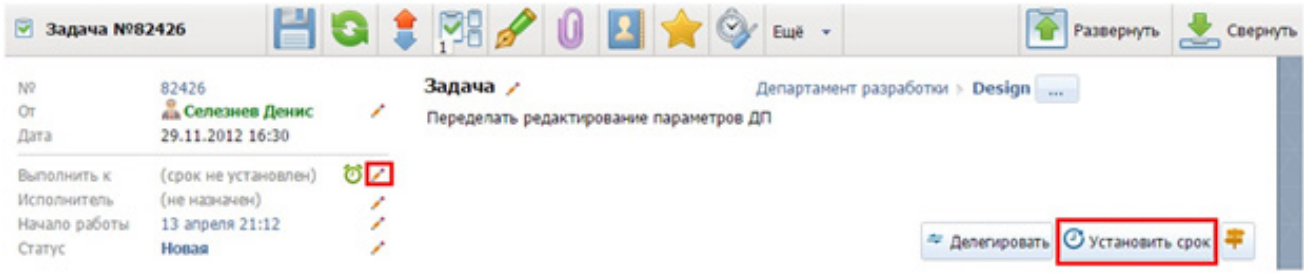
3.4.6 Reminders

In order not to miss the task completion time and execute the planned actions in due time, a task reminder can be set. The reminders are set by clicking a pictogram next to the field "Completion Time". Reminders can be viewed in the time and reminder window opened by clicking the icon in a task card menu.

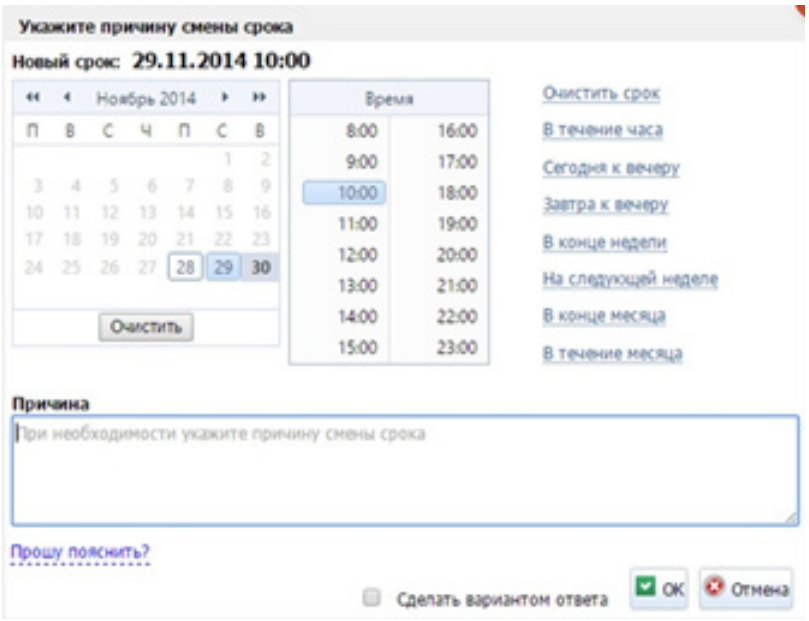


3.4.7 Date Change

The task completion date enables establishing a time limit for a task and monitoring its compliance (for tasks where it is required. Otherwise the task may not have a set completion date). To change the task completion time, click the button "Set the Time" (or the pictogram next to the field "Time"):

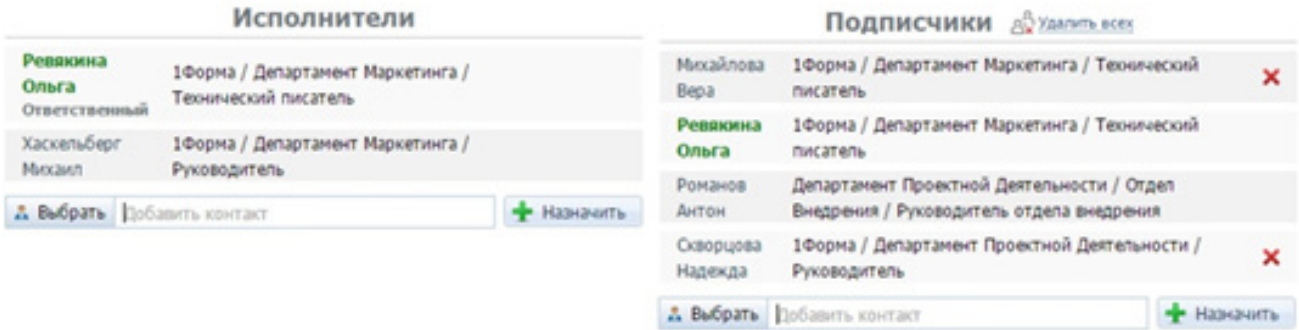


In the open window the task completion time can be set in the "time" or "date and time" format (depends on the specific system settings and particular task), and then specify the reason for the date change (as a rule the time is impossible to change without giving a reason). Upon changing the time, the system automatically generates a relevant comment.



3.4.8 Change of Assignee and Subscriber

If an employee has relevant rights, he may change an assignee and subscriber lists for the task. To do so, click the pictogram in the bar "Assignee".

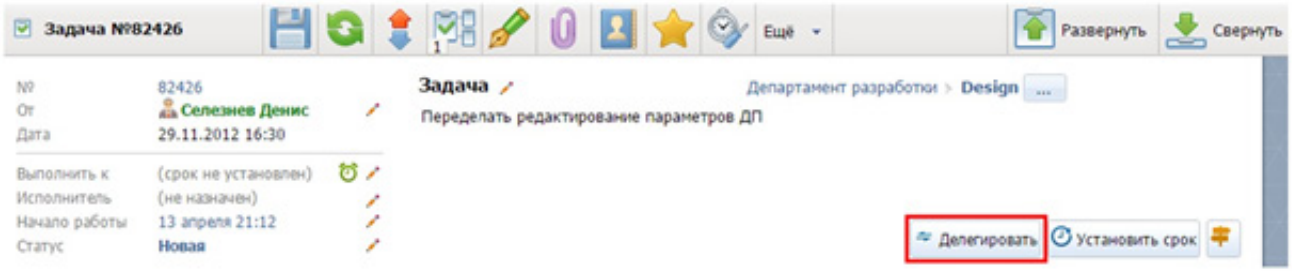


It should be noted that an assignee cannot be changed for an overdue task (first, a completion date has to be extended).

A task giver and assignees cannot be deleted from the list.

3.4.9 Delegation

If an employee is overloaded with his work or thinks that he cannot complete the assigned task, he may transfer it to another employee for completion (if he is duly authorized). The task transfer to another employee's responsibility is called delegation. Changes are automatically made in a task assignee list during the delegation.



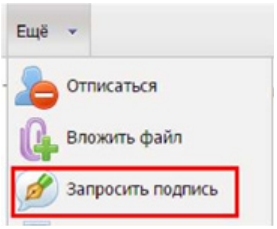
3.4.10 Task Decision Making

Task decision making is usually connected with taking responsibility for execution of a particular action. The employee making a decision often has to certify it by his signature. It is implemented in 1FORMA using the accept mechanism.

Accept is an electronic (uncertified) signature. An employee putting his signature is called an acceptant.

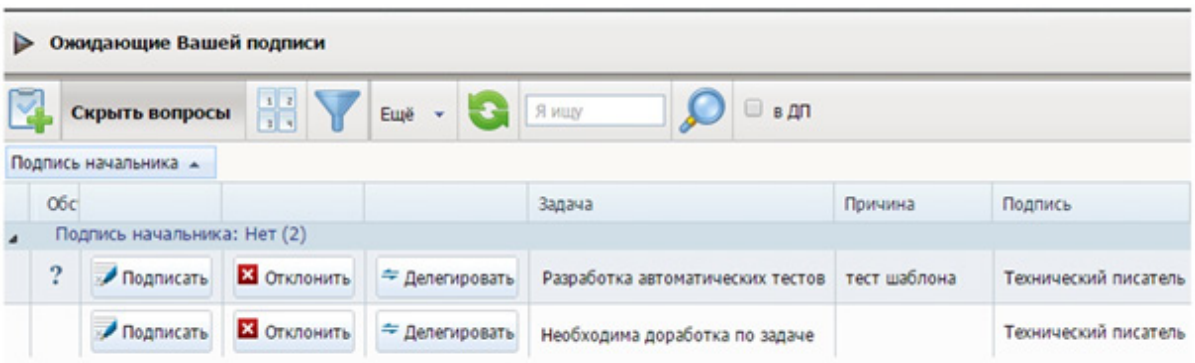
The term "signature" used in 1FORMA is not like a traditional signature on paper documents. The signature in a paper document is put once and certifies the entire document. The signature in 1FORMA (accept) confirms the consent to execution of a certain specific action (for example, the consent to the transfer of a document to the partners for its approval). Such accept may be requested several times in the course of the same task execution.

If the signature is always required at the current stage of the business process, the automatic search request displayed on the task route is set. If in the course of task execution there is an additional need for the signature, the user may request a **dynamic** (one-time) signature:

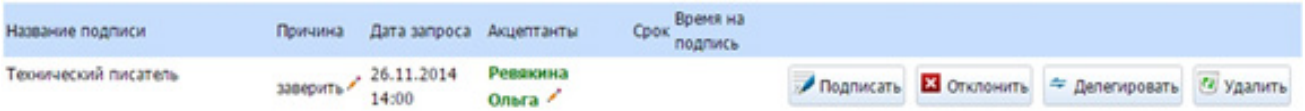


If there are tasks waiting for the employee's signature in the 1FORMA System, then he will see a relevant indicator in the right upper corner:

By clicking this indicator, a waiting list for signatures is displayed. With such list a manager can quickly confirm his decision on the task without entering the task card.



If he needs more detailed task information, he can go to the task card (clicking the required row), view all the parameters and comments he is concerned, and indicate his accept directly on the task card:



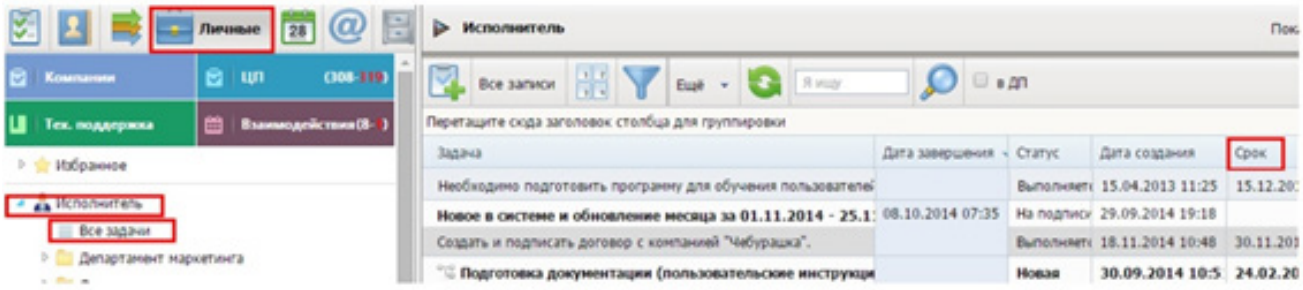
If an acceptant cannot make a decision, he may delegate the accept function to another responsible employee (if he is duly authorized).

3.5 Follow-up control

An important performance indicator of BUs and the company is performance discipline - task completion in due time. The main control tool for performance discipline compliance in 1FORMA is the parameter "Completion Time".

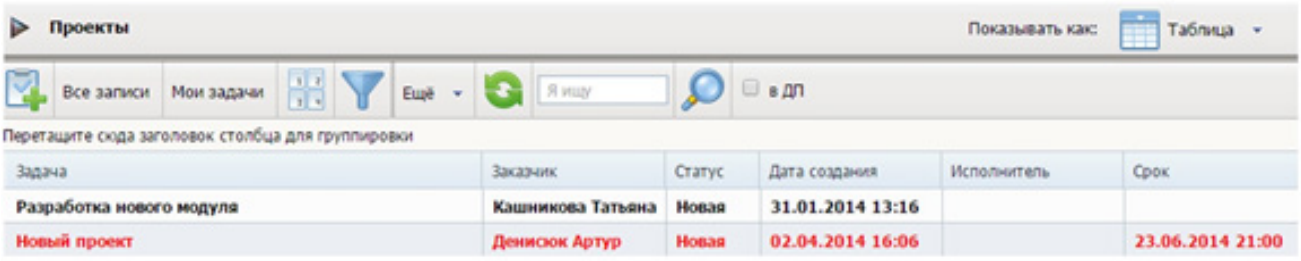
Overdue tasks are serious signals and require special attention of a task giver, assignee and, evidently, their managers. There are several ways of monitoring overdue tasks in 1FORMA.

Of course, it is better not to allow appearing of overdue tasks. To do so, the assignee needs regularly (for example, once a day) to check his task list (i.e. using the "All Tasks" virtual folder in the aggregate section "Assignee") and analyze them. If, according to the employee's opinion, the time limits are impractical for some tasks, the date should be extended in advance, after informing thereof, and, if required, obtaining manager's and task giver's approval.

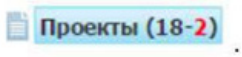


If an execution time was not extended in advance, it is required to do so for the overdue task.

In the standard view mode, the overdue tasks are displayed in red that helps the employee and manager quickly assess the work status.



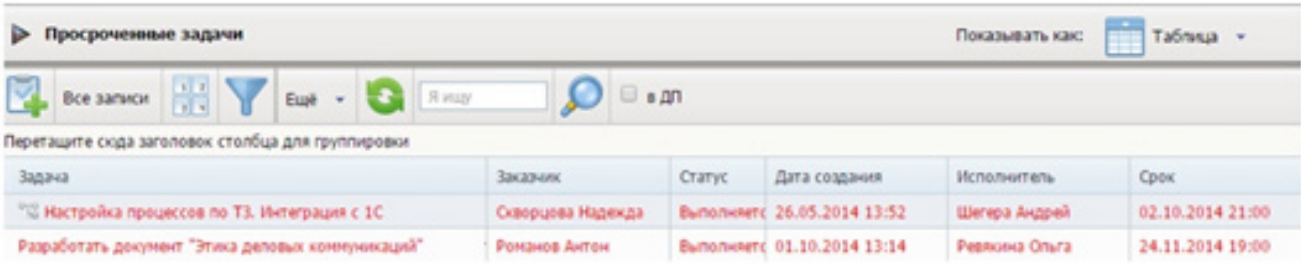
The number of overdue tasks is displayed in red next to the section name:



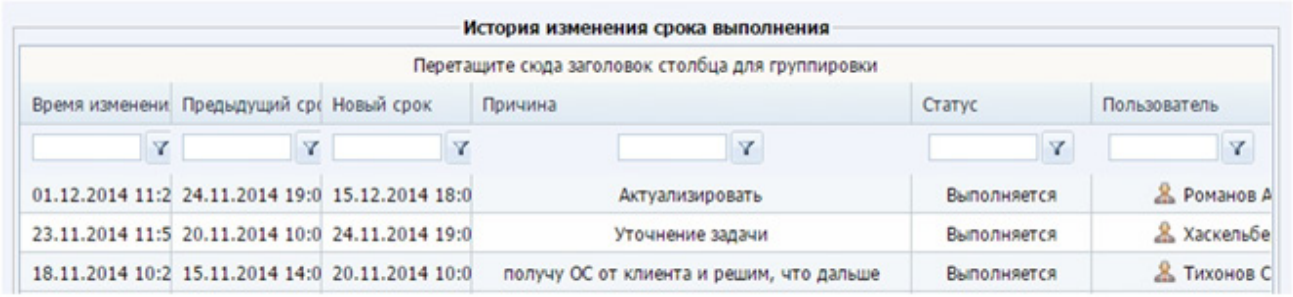
As regards the overdue task, a task giver and a manager of an employee, which is the task assignee, receive daily notices by e-mail (with the related system setting).

If an overdue task appears, a signal indicator in the right upper corner of the assignee's screen activates:

An overdue task list is displayed by clicking this indicator.



First of all, working with an overdue task, specify the proper completion date. Depending on access rights customized in the system, the task completion date can be changed by an assignee, his manager or a task giver. As a rule, when extending the completion time, it is required to give a reason. History of all time extensions can be viewed by clicking the icon in the task card menu:



It is important to extend the date immediately when an assignee understands that the task completion by the set date is impossible, or as soon as a task giver receives new information affecting the task completion time. A proper indication of the execution time is critical for work planning and may affect many employees interested in the completion of a specific task.

3.6 Task Interrelations

Sub-Tasks

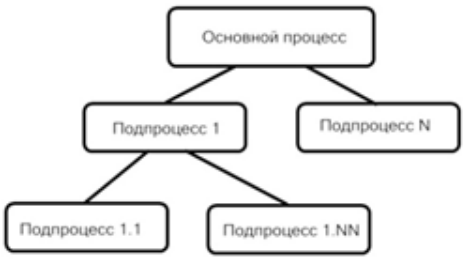
Related Tasks

3.6.1 Sub-Tasks

The Company's employees and units do not work autonomously, they actively interact with each other, jointly solving complicated tasks.

Such task solution consists of consequent or concurrent execution of a number of smaller tasks; each has its own execution procedure. To provide easier and more transparent management of complicated and long-term business processes, it makes sense to divide (decompose) them into a number of simpler and shorter tasks. It results in the business process hierarchy:

Task route in the Category

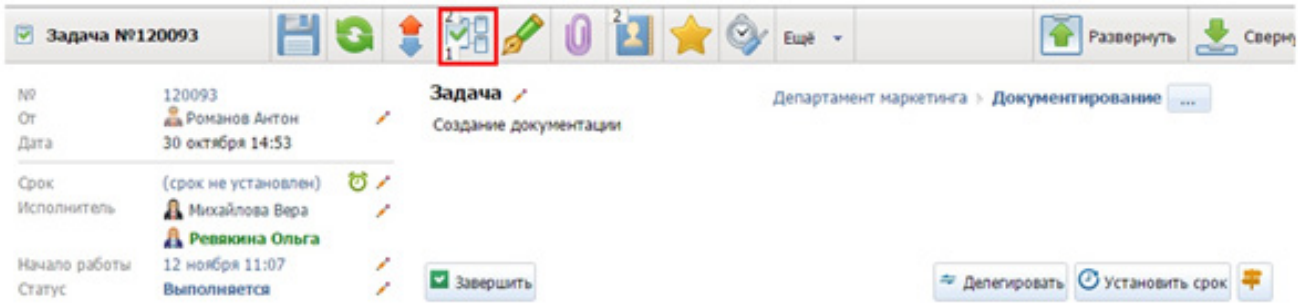


An optimum variant is considered to be a decomposition level, where the sub-processes of a lower level can be executed by one assignee in a relatively short period of time.

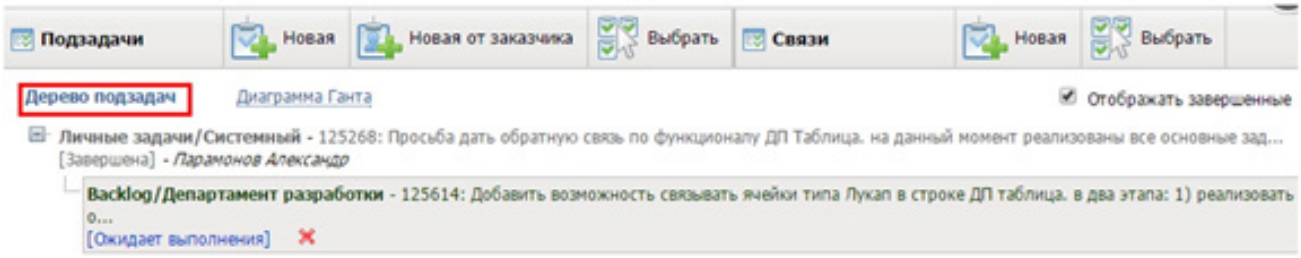
Task and sub-task hierarchy in 1FORMA may be according to the same principle. For example, for the task "New Employment" the following sub-tasks may be created, i.e., "Staff Document Execution", "Workplace Preparation", etc.

Sub-tasks can be created manually or automatically at the stages of a particular route, according to its settings. 1FORMA application can be customized so that the task cannot be completed before all its sub-tasks have not been completed.

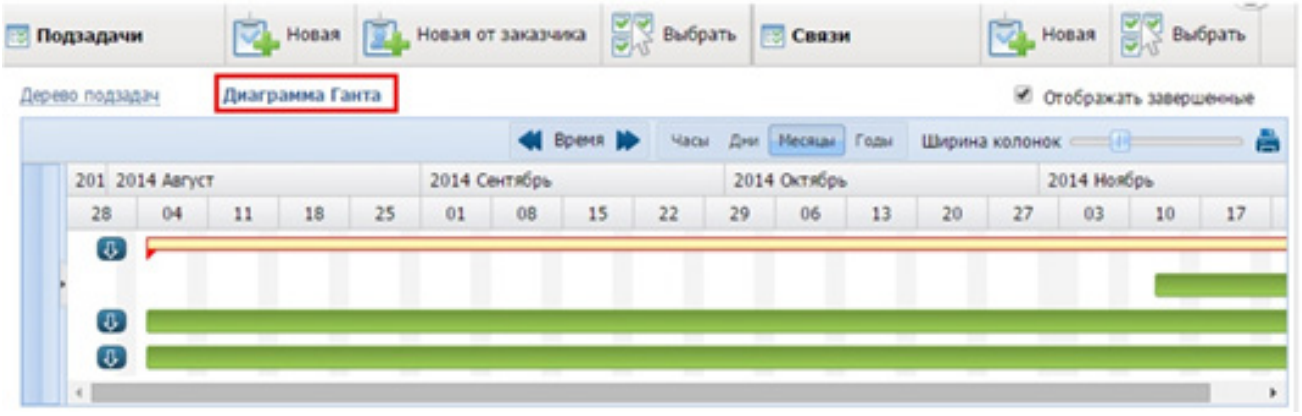
The hierarchy view is available by clicking the icon in a task card menu. At its top, a quantity of tasks at higher hierarchy level is displayed, at the bottom – a quantity of sub-tasks:



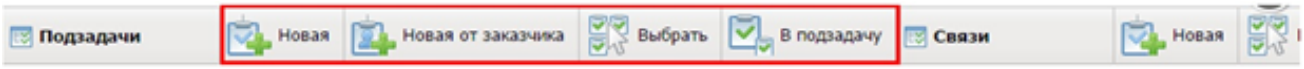
System task hierarchy can be represented in the form of a sub-task tree



or Gantt Chart (the Gantt Chart "legend" is described in the project management guide)



Hierarchical relation can be established directly from the sub-task tree:

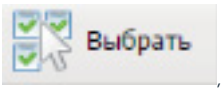


• using the button

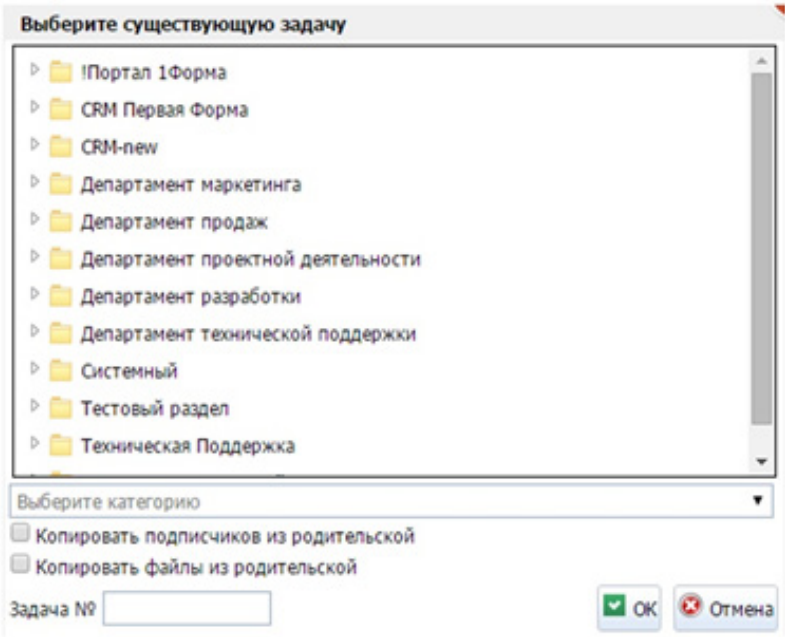
, a user can create a sub-task in one's own name;

• using the button

, in a task giver's name is indicated in the task;

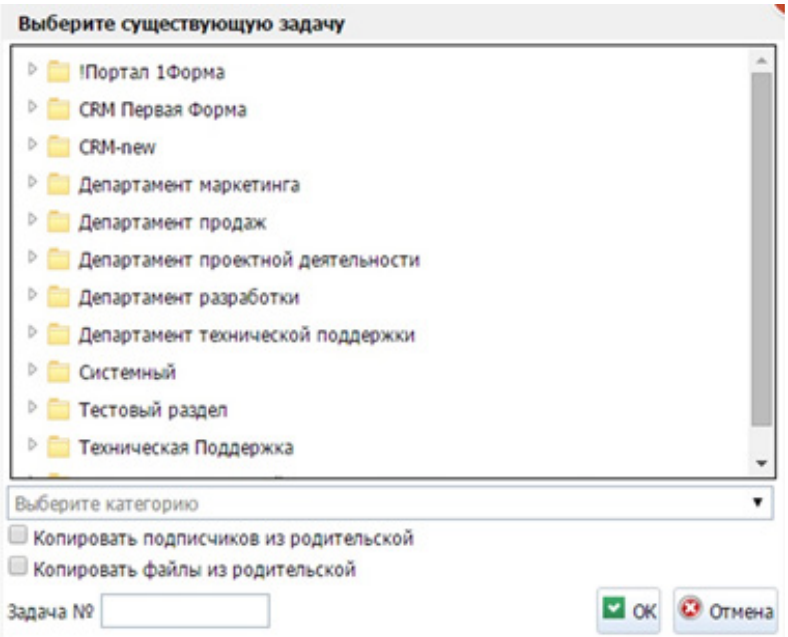
• using the button 

, an existing task can be selected as a sub-task;

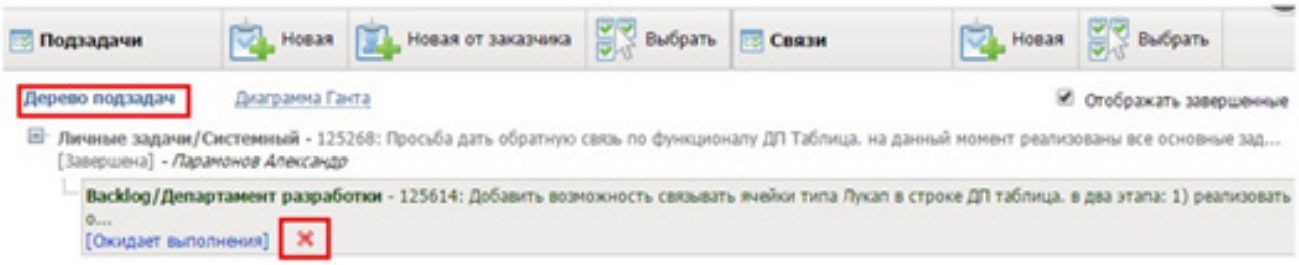


• using the button

, a current task can be made a sub-task and a "parent task" can be selected.



To cancel a previously set relation, click on the sub-task tree:

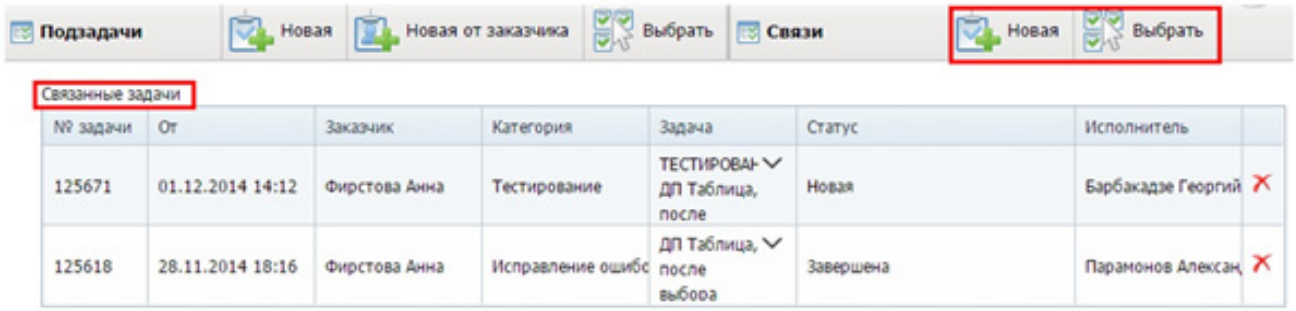


3.6.2 Related Tasks

Different business processes often have "contact points". For example, the support service several requests can receive the tasks which arrive independently but actually arise from the same reason. When a new remedy task is created in the support service, it should anyway refer to all these requests, enabling the specialists to obtain the full understanding of the situation. Such tasks may be related to each other, though such relationship is not hierarchical ("main - subordinate") but linear relation, like same-level tasks.

The linear relation view is available by clicking the icon in a task card menu

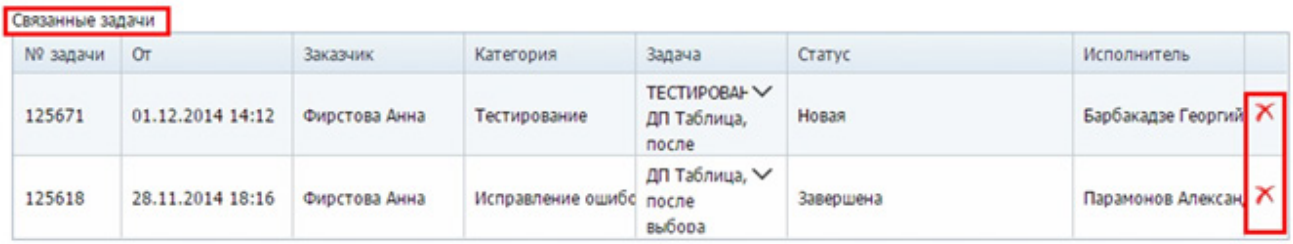
Linear relations are displayed in the table form:



Using the button ("New") you can create a new task and establish its relation with the current task;

using the button ("Choose") establish a relation with an existing task.

To cancel a previously set relation click in the relevant row of the Related Task Table:



3.6.3 Projects

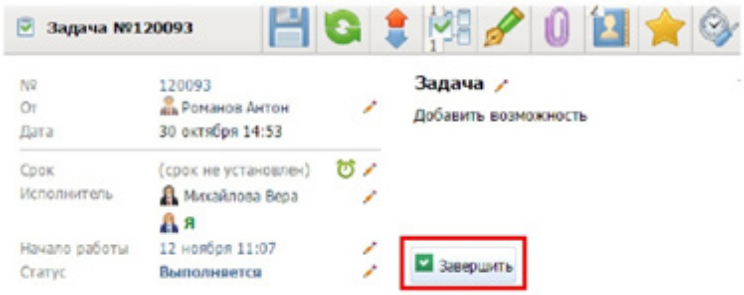
1FORMA also implements an option of breaking down large tasks – projects intro sub-projects and project tasks, as well as entire project management (time limits, resources, expense budget). This functionality is described in the Project Management Guidelines.

3.7 Task Work Completion

A number of completed (finished) tasks is an important indicator characterizing the unit and employee's performance results. That is why the tasks should be completed in due time, as soon as all works are completed, and final accepts are received (if required).

To complete standard route tasks, click the button "Completed" and the task will move to the "Completed" status. Titles may differ on other changed routes.

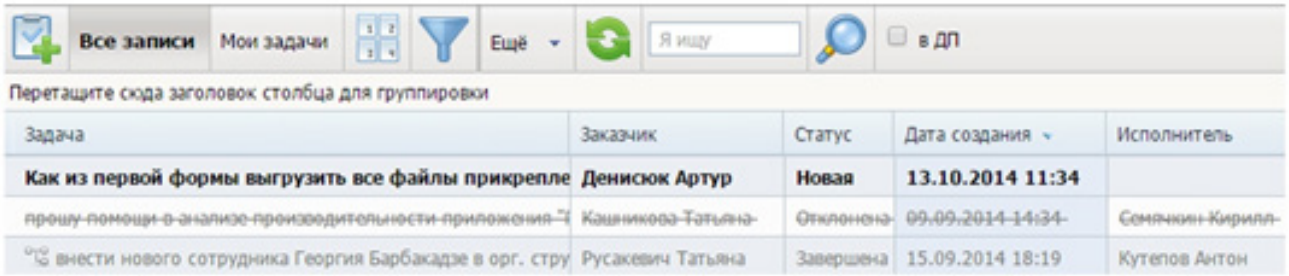
Task Route in the Category



When viewing the Category or Section, only active tasks are displayed by default. In order to display completed tasks in a common list as well, activate the mode

("All Records").

Then the successfully completed tasks are displayed in grey, and unsuccessfully completed tasks are represented in a grey color and strikethrough font.



The field "Completion Date" is automatically filled by the system at the moment of a task completion. It helps to estimate the number of tasks completed for the period, or to search the tasks completed for a known time period.

IV Examples of 1FORMA Efficient Use

Working Day Organization

Workplace Ergonomics and Organization

Internal Communications

External Communications («Personal Accounts»)

Manager Services

"I am an Assignee" Check List

"I am a Manager" Check List

4.1 Working Day Organization

Indicators

Stream

Calendars

"Personal" Mode

4.1.1 Indicators

The working day is recommended to start with the assessment of current work progress and planning of working hours. Special attention should be paid to the most urgent and important tasks. For this purpose, several quick and efficient tools are implemented in 1FORMA.

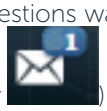
When activating the application, the first glance at the signal indicators (in the right upper corner of the screen) will help to answer three important questions:

• Do you have any overdue tasks? (indicator

)

• Are there any tasks waiting your signature? (indicator

)

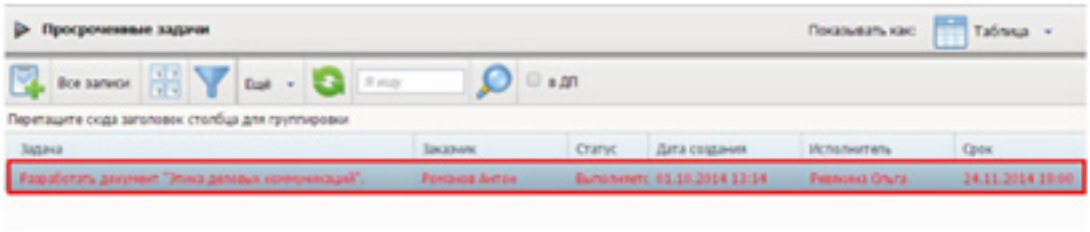
• Are there any questions waiting your answer, and have you received the answers to your questions from the co-workers? (indicator 

)

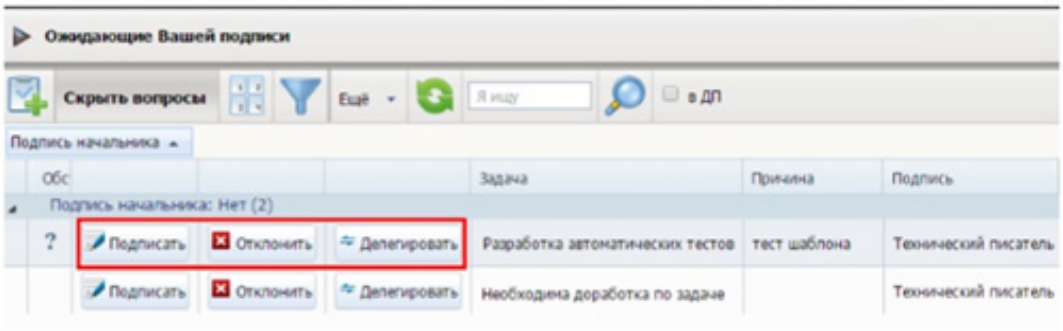
Clicking each indicator, the user goes to viewing the related task list and can quickly execute the required actions.

So, by clicking the indicator

the user goes to viewing the overdue task list. When selecting each of them in sequence, he can extend the date in the viewing window.



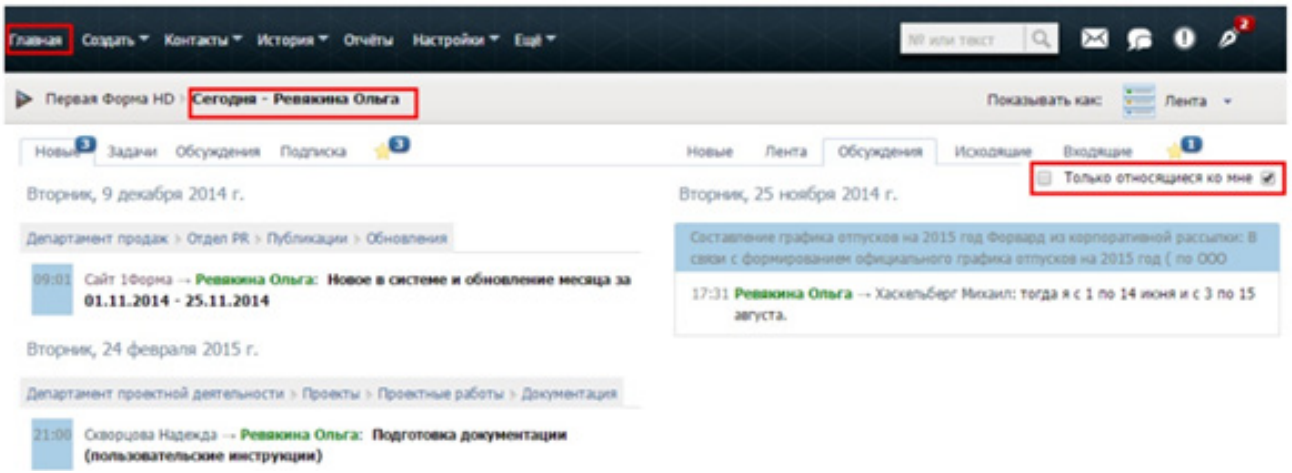
By clicking the indicator the user goes to the requested accept list. The list is displayed so that in most cases the decision can be made even without going to task cards.



By clicking the indicator a user goes to Comment Stream and can reply to them directly in the feed, without wasting time for going to task cards.

4.1.2 Stream

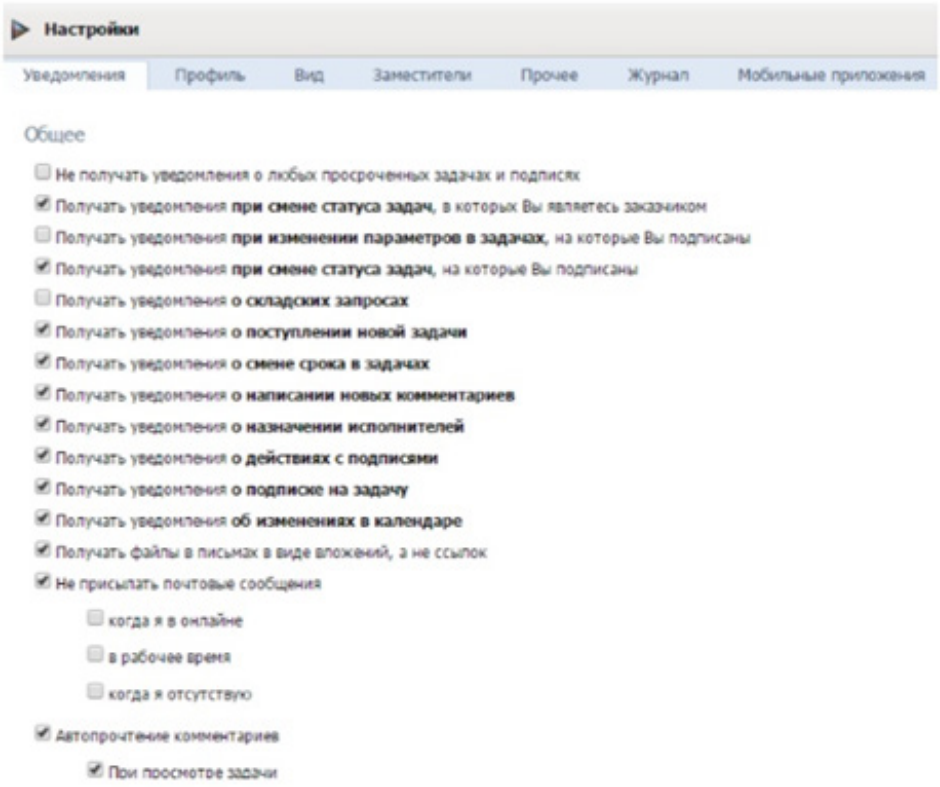
The "Stream" representation can be used not only for viewing an individual category, but also as aggregate representation. Such stream is opened by clicking the "Main" in the menu. Stream is a kind of company's "pulse". It displays in online mode all tasks, discussions, signatures, - everything going on at the moment.



The tab "New" in the task stream represents all new tasks, the tab "Tasks"– all task in the course of execution (uncompleted tasks), the tab "Discussions"– the discussions (of tasks from the system section, from the category "Personal Tasks"), the tab "Setting"– all active tasks. The Comment Stream contains comments from the same section tasks.

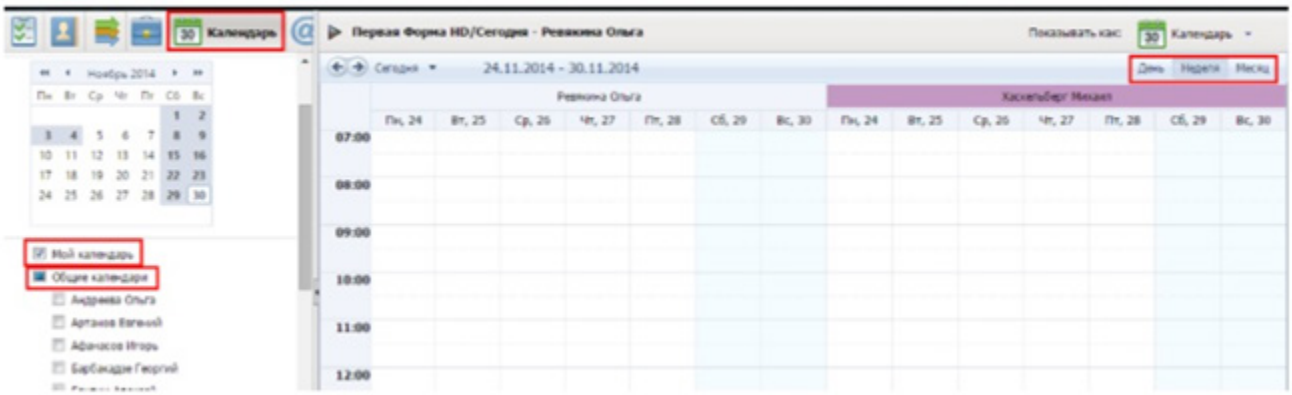
In the Comment Stream, using the flag "only related to me", the comments on the tasks, where the user is not a task giver, subscriber, assignee or acceptant, can be deactivated.

The details of feed information can be customized by a technical specialist and by a user himself, using the menu "Settings" -> "Notices":

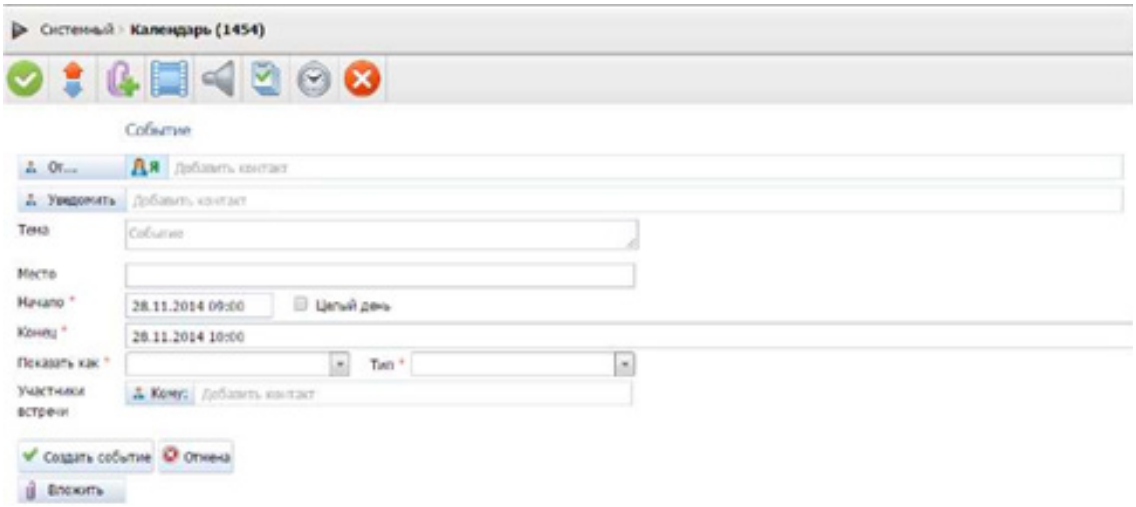


4.1.3 Calendars and Absence Records

Calendars are useful for planning working time. 1FORMA allows a user not only to view his calendar but also his colleagues' calendars. They help to set up briefings, meetings, and other events, because a user can choose the time suitable for all participants.

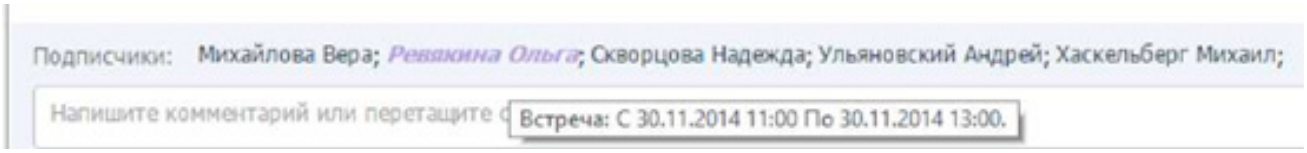


To create a new event, click the selected time twice, set the meeting parameters and invite the participants.

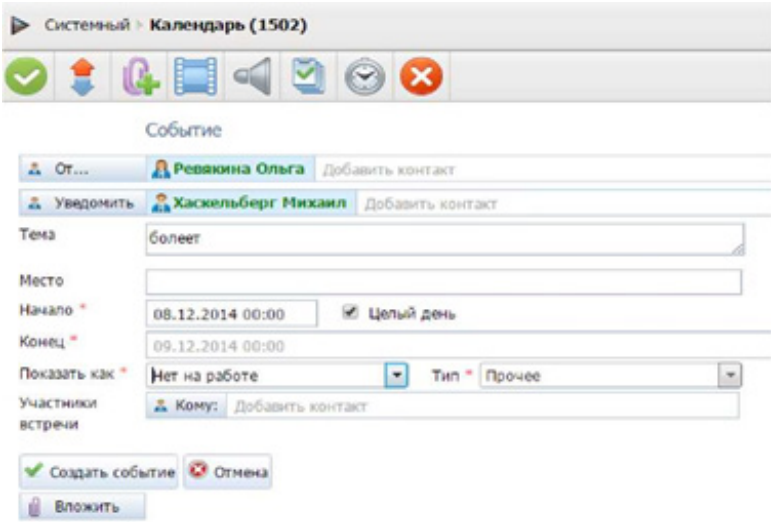


When asking an urgent question or setting a task to another user, it is important to know how soon he will answer or begin the task execution. In this case, it is important to know, if this user is at his workplace or on sick leave, or at a meeting, on a business trip, etc. at the targeted time. For this purpose, there is an **absence record mechanism** in 1FORMA System. The absence types are customized by a technical specialist. Creating an event in the calendar the user can select one of the absence record types (the parameter "Type", for example, includes "Vacation", "Meeting", "Remote Work", etc.) and specify his availability at this time (the parameter "Show as", for example, includes "Occupied", "Available", "Questionable" etc.).

T he users, who put their event in the calendar during the specified period, will be displayed in the system in another font, and when the cursor points at the user's name, a brief comment will be displayed:



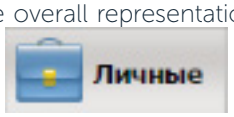
Besides, the user can record his absence and inform other employees thereof using the button ("Put Absence") in a menu. In this case, a task will be created in the system category "Calendar", where, in the field "Notify", the user can indicate the employees, who will receive notice of his absence during the specified time, may be designated:



In a similar way, the user may (if duly authorized) indicate his co-worker's absence, if he cannot do it by himself for any reason.

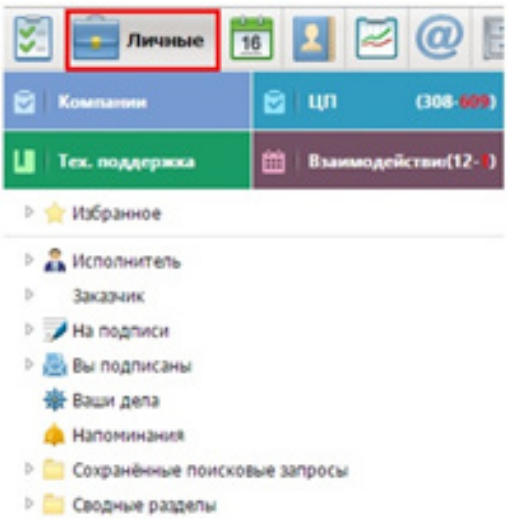
4.1.4 "Personal" Mode

The mode

("Tasks") is useful to have overall representation of the company's operations as a whole. For the user, to focus efforts on his tasks the mode 

("Personal") is most useful.

In this representation, the user can see his tasks grouped by roles. Within each role, the tasks are broken down by customary section and category, but the user can see only the tasks assigned to him. Besides, several aggregate sections appear there.



• «Assignee»: all tasks where the user is an assignee;

• "Task giver": all tasks where the user is a task giver;

• "For Signature": all tasks where the user is an acceptant;

• «Your Subscriptions»: all tasks where the user is a subscriber;

• "Your Work": a user by his own choice can enter into this section the tasks he often refers to ("Add to Your Work" item of the "More" menu of the task card);

• "Subordinates' Tasks" (displayed only for managers);

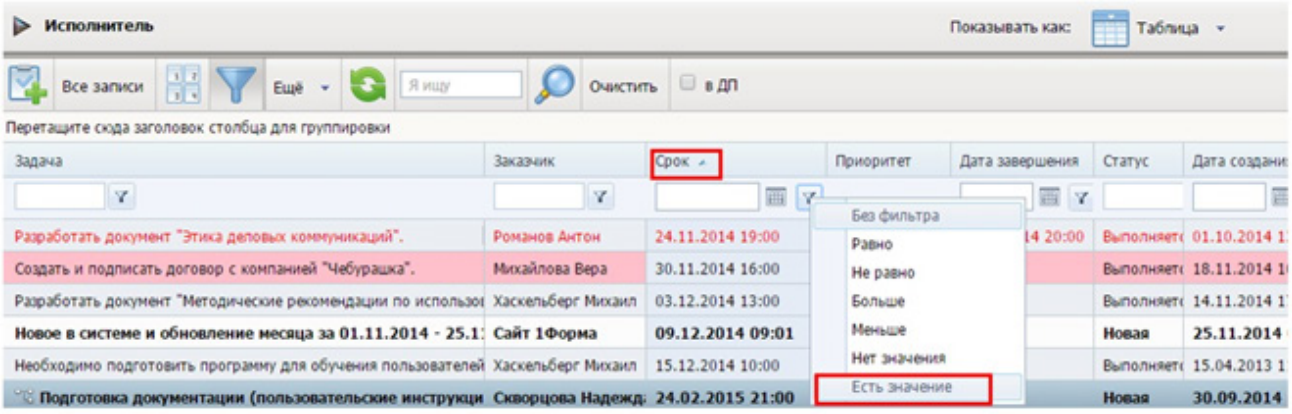
• "Reminders": all reminders of the terms set by the user in the tasks (the pictogram);

• "Aggregate Sections": virtual sections where the tasks from various sections and categories can be gathered (customized by a technical specialist).

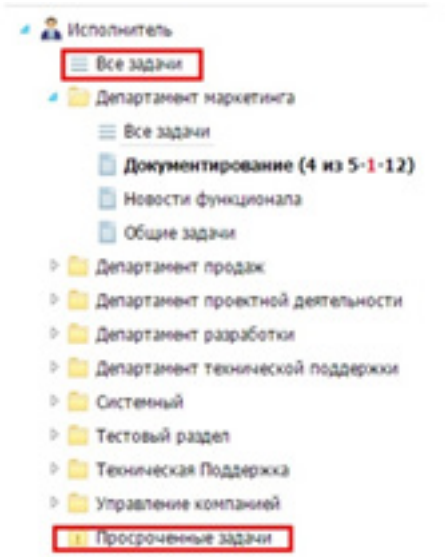
The aggregate section "Assignee" contains the virtual section "All Tasks" that allows the user to view all upcoming work at glance. At the same time, in the section "Assignee", all the categories and sections where the user's tasks are indicated are available.

With sorting and filtering mechanisms the user can choose the most urgent and high priority tasks. For example, after setting the sorting in ascending order and using the filter "Value Specified", the user will see all tasks (from all categories and sections) to be executed firstly.

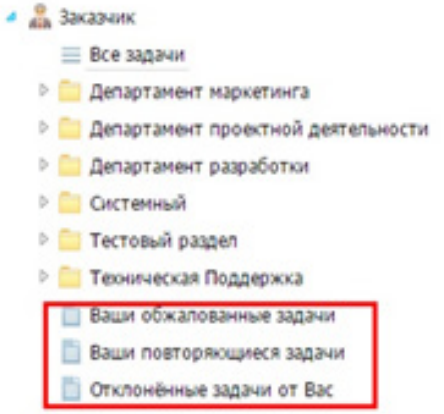
After setting sorting or a filter to a task status, the user can estimate, how many new tasks he has received for all business processes and accept them for work immediately or set up the work commencement date (enabling the task givers to receive the relevant notices and take this information into account making their own plans).



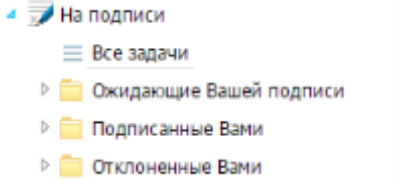
Besides, the section "Assignee" contains "Overdue Tasks", where all user's overdue tasks from different categories are collected.



The aggregate section "Task giver", except usual sections and categories, also contains the virtual sections "Your Contested Tasks", "Your Repeated Tasks" and "Your Declined Tasks" virtual sections.



The aggregate section "For Signature" contains the virtual sections "Waiting Your Signature", "Signed by You", and "Declined by You", Using these sections a user can not only perform the current activities but also view through the history of his implemented acts.



4.2 Workplace Organization and Ergonomics

Favorites

Portal

Group Workplace

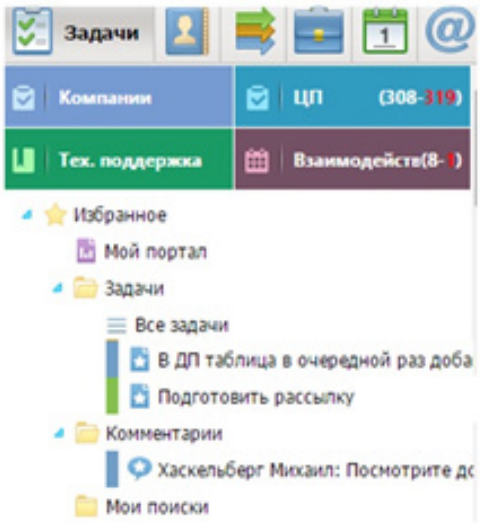
History

Quick Replies

4.2.1 Favorites

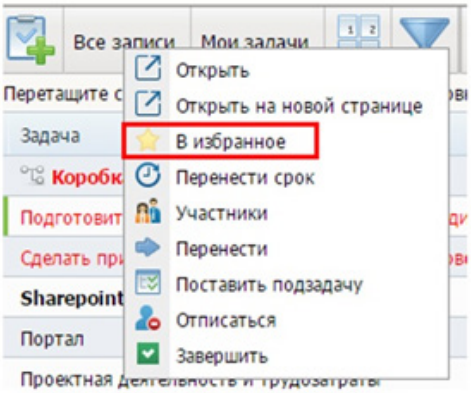
Every user has his own information set, he occasionally refers to. It may be document templates, explanations, and instructions, etc. It is desirable to have such data available and find quickly, if necessary. For this purpose, the functionality "Favorites" is implemented in 1FORMA.

The section "Favorites" is individual tool for each user. It is initially absent in the system and starts displaying only when the user marks his first task object, comment, search condition, link, portal as the "favorite".

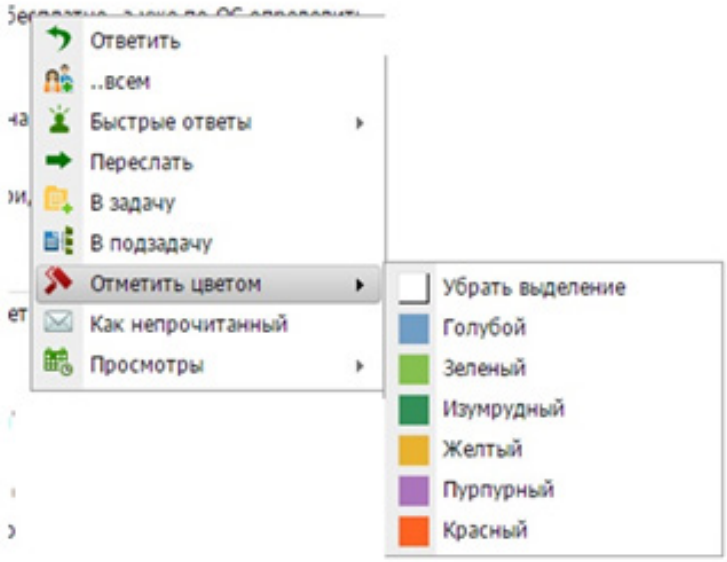


The selected favorite tasks are marked in a task card menu, using the icon category:

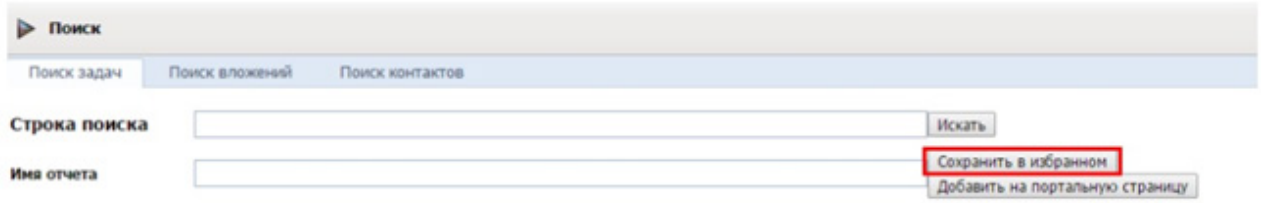
or in the context menu while viewing through the category:



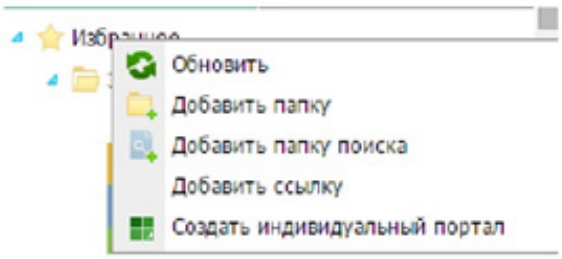
To add a comment to the "Favorites", mark it with any color:



If the user is going to use complicated conditions of search and data selection settings, it is advisable to save them in the "Favorites":



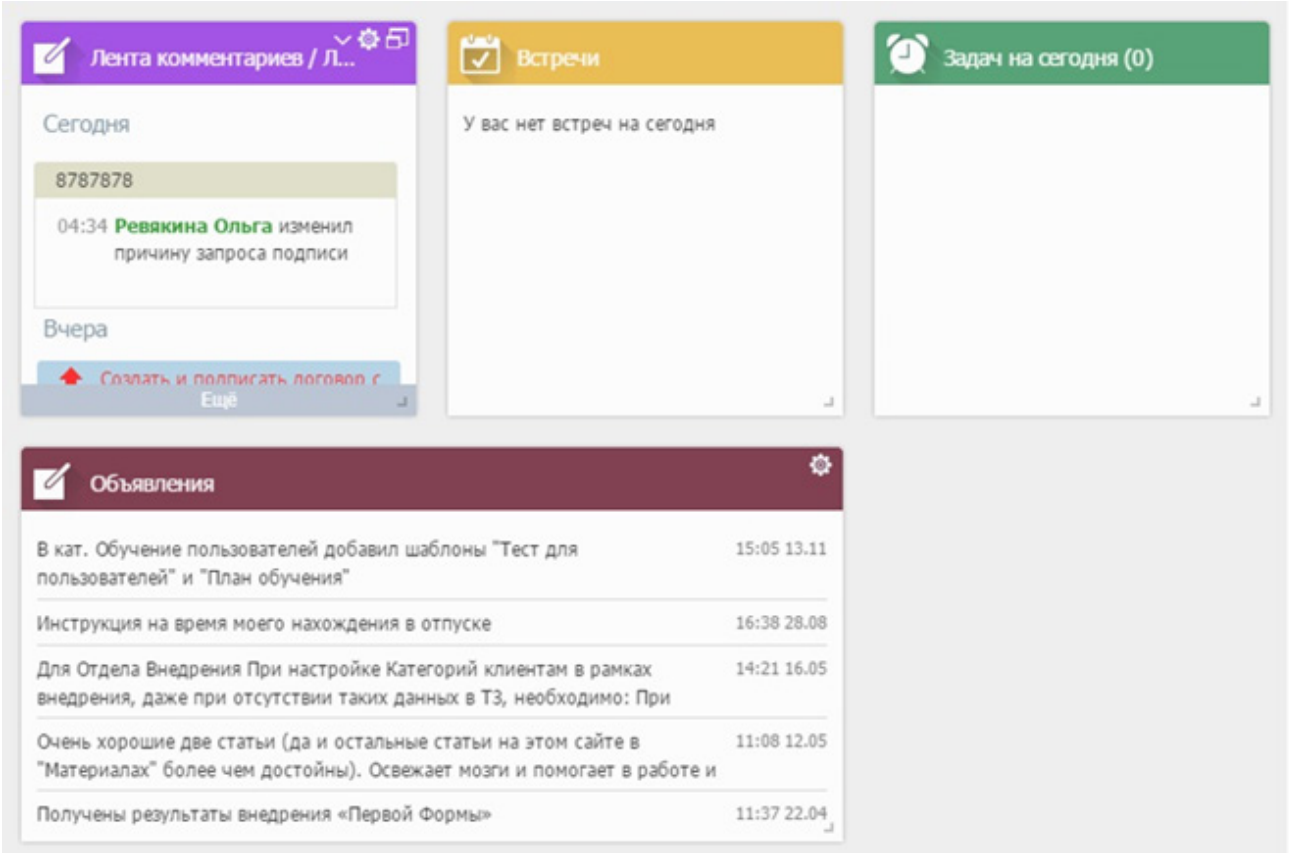
Also, an object can be added to the favorites using the context menu of this virtual section:



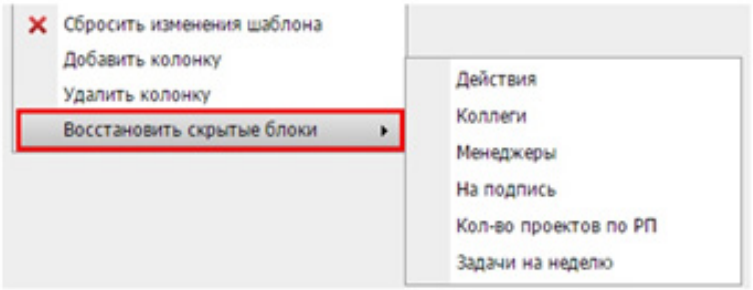
4.2.2 Portal

The portal is a flexible and convenient tool for information organization in 1FORMA. It can be opened by clicking the logotype

.

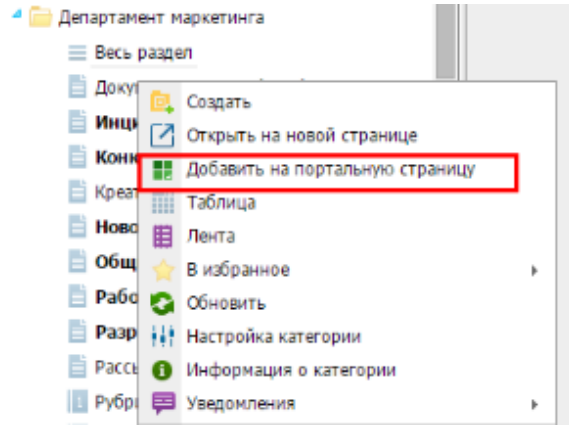


The portal can be used for displaying brief summary of current tasks, customizing a menu with the key indicators, providing quick access to the sections which are most important for a user. Besides, the portal is useful for displaying company-wide announcements, employees' nearest birthday dates, etc. The composition and contents of the blocks located at the portal are customized by a technical specialist, but the user may partially adapt the portal interface for his purposes. So, the user can hide individual blocks (such blocks have the icon in the right upper corner for clicking), as well as restore previously hidden blocks (using a portal context menu):

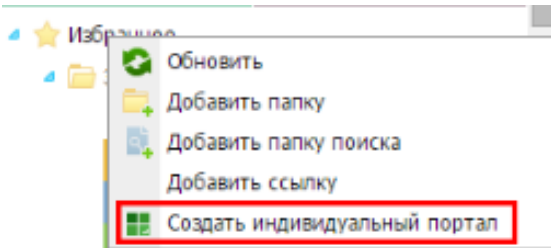


The blocks can be interchanged by dragging them.

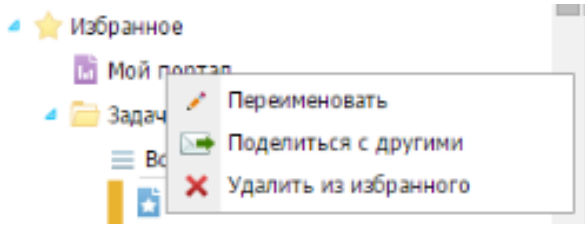
The user can display his required categories on the portal (using a category context menu):



Besides, the user can create **an individual portal** himself.

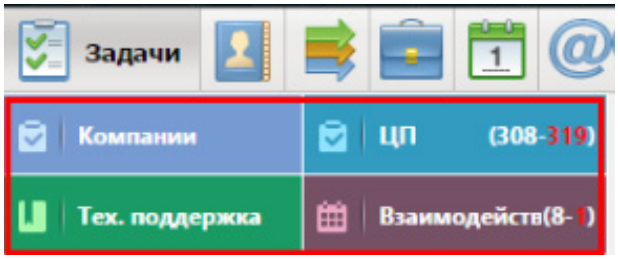


And even share it with the co-workers:



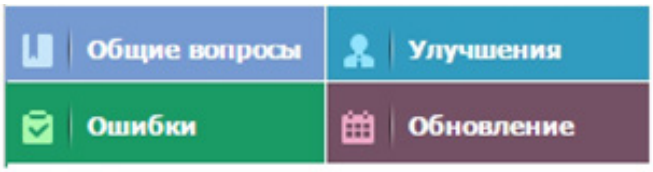
4.2.3 Group Workplace

1FORMA quick access to four main system functions can be customized. For this purpose, four special buttons called "Group Workplace" are provided. They are under a navigation menu. Such workplace is usually customized for a group of users working on common or similar tasks (for example, a workplace for sales managers or secretariat can be configured). Such configuration is made by a technical specialist.

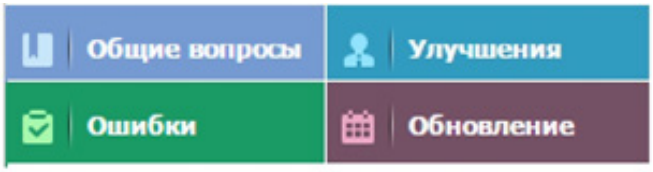


The workplace buttons can be customized for the following functions: opening the required category, section, report or the aggregate section, as well as creation of a new task in the chosen category.

For example, the technical support service a workplace may look like this:

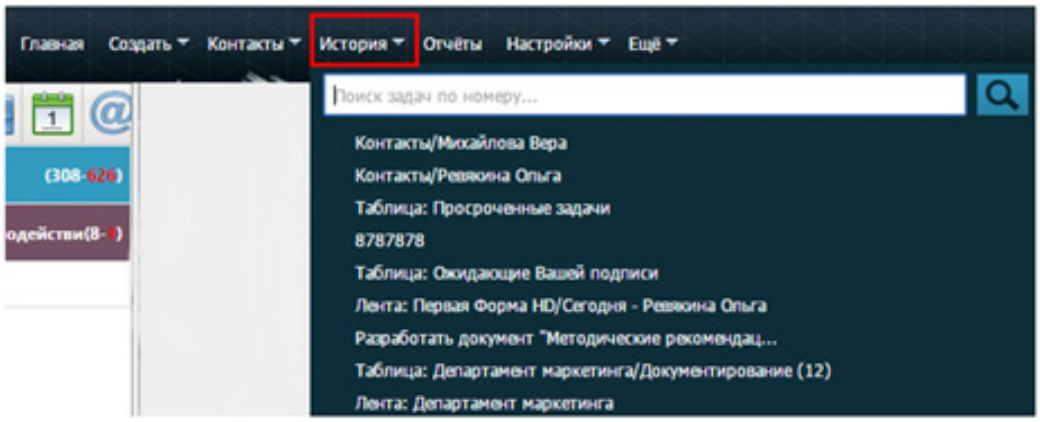


The top management's work place is represented this way:



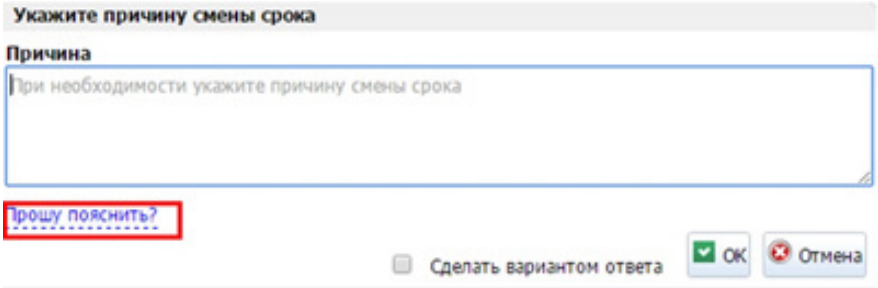
4.2.4 History

It is often required to return to the recently viewed information. 1FORMA keeps the history of user's. It is available in the item "History" of the main menu in the inverse chronological order. Choosing a required item, the user can quickly return to the required action.

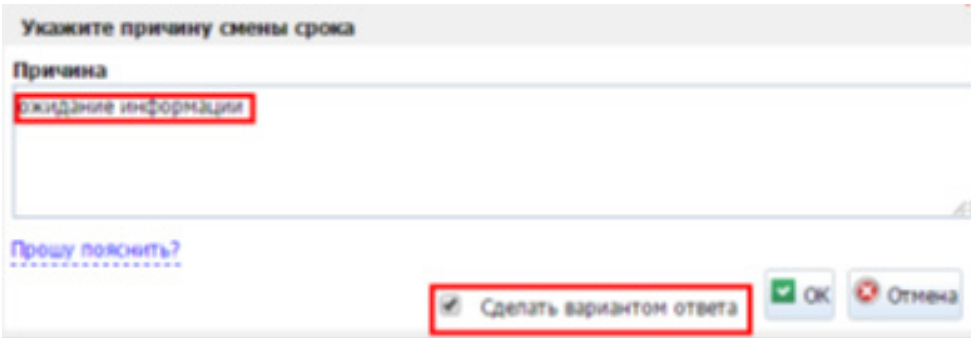


4.2.5 Quick Replies

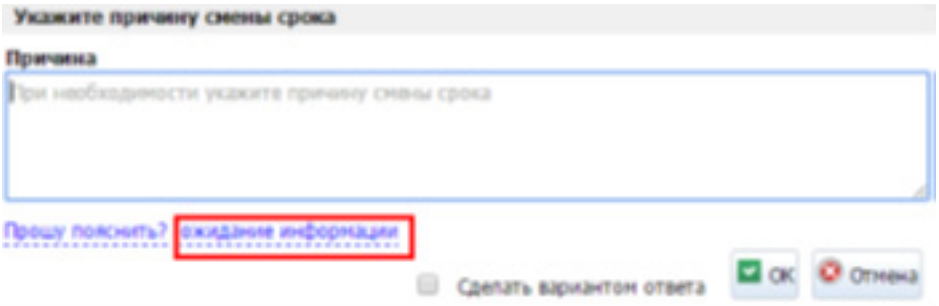
When changing task completion time, declining accepts, and in some other cases, managers and employees have to explain their actions. These explanations are often repeated from one task to another. For example, the completion time extension is explained by waiting of the required information from the employee of the related department or by large workload. To prevent the entry of the same text each time, the "quick reply" mechanism is developed in the system, these are phrases are set in advance, to select a suitable one for a particular case.



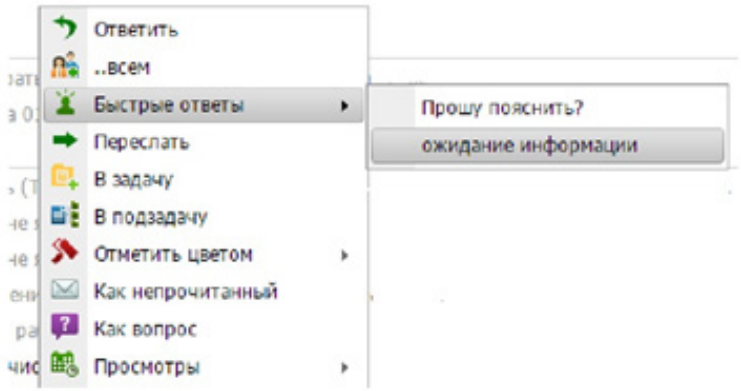
Quick replies can be customized by a technical specialist (then they are available to all system users) or added by the user (for his personal use). To create your own "quick reply", just mark the flag "Make a reply version" using the required phrase next time:



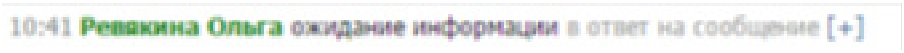
During the next use of such window, this phrase will be already among your quick replies. Further, you need not to enter it but also choose it by clicking:



Quick replies may be also used to reply to a task comment by opening the context menu with a right click:



In this case a comment reply will be created:



4.3 Internal Communications

Organization Structure and Contacts

User Profiles

Message Exchange

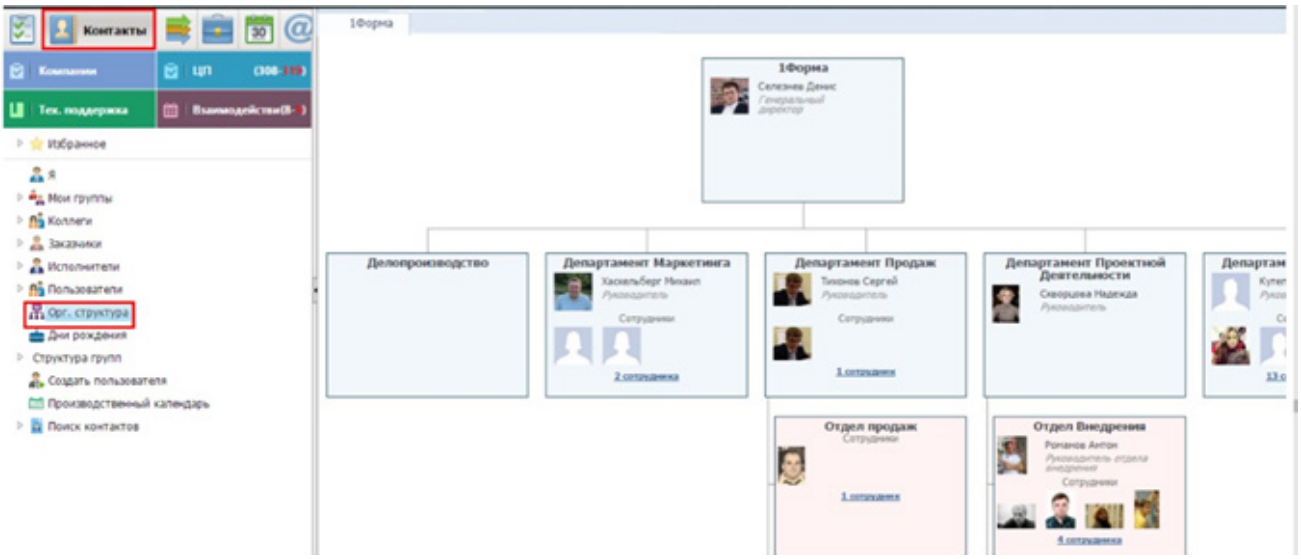
Use of Comments in Tasks

Comment Stream Replies

4.3.1 Organization Structure and Contacts

For effective joint work, the employees need to understand their company organization structure and understand the scope of duties of their colleagues'. It will help to properly address questions, comments and request signatures.

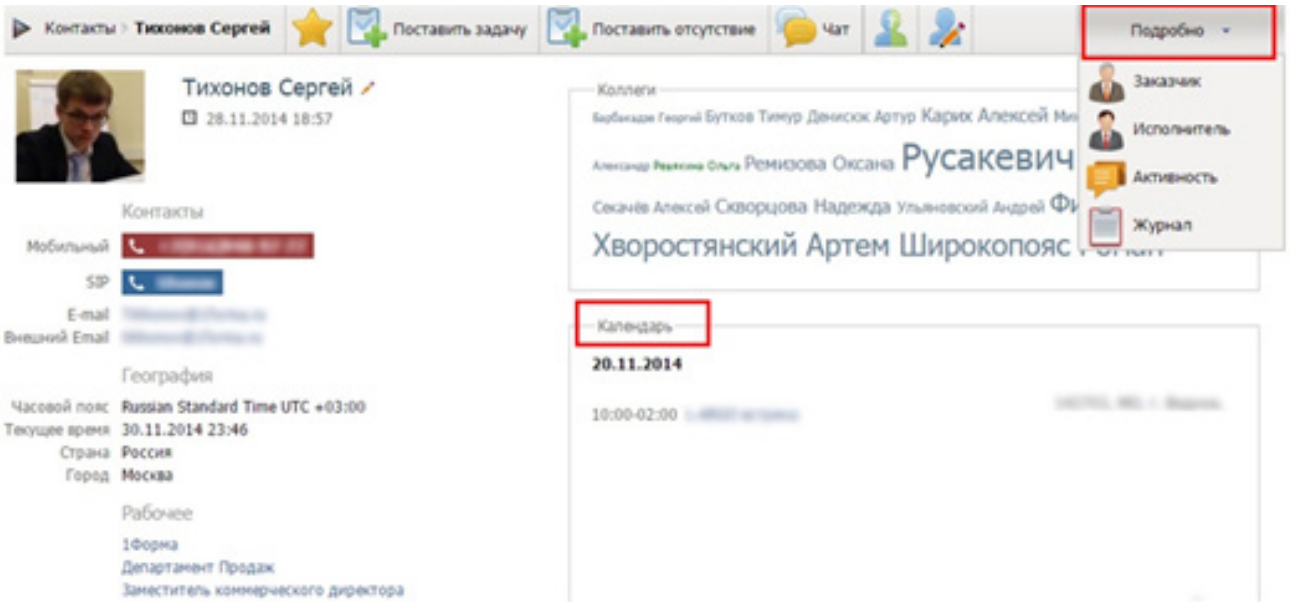
To view the hierarchical diagram of the organization structure, click the "Contacts" navigation menu button and choose the section "Org. Structure". The diagram represents the structure of each unit with the option of viewing each unit's staff, and go to the page with details of a particular employee.



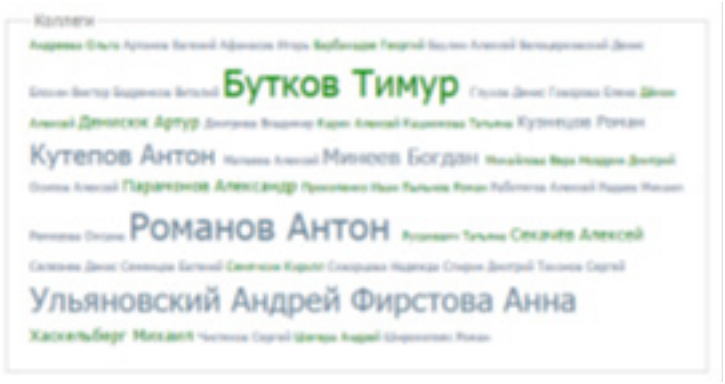
The full list of employees can be viewed in the "Co-Workers" section. Besides, the tab "Contacts" shows the employees acting as task givers and assignees for the user's task.

4.3.2 User Profiles

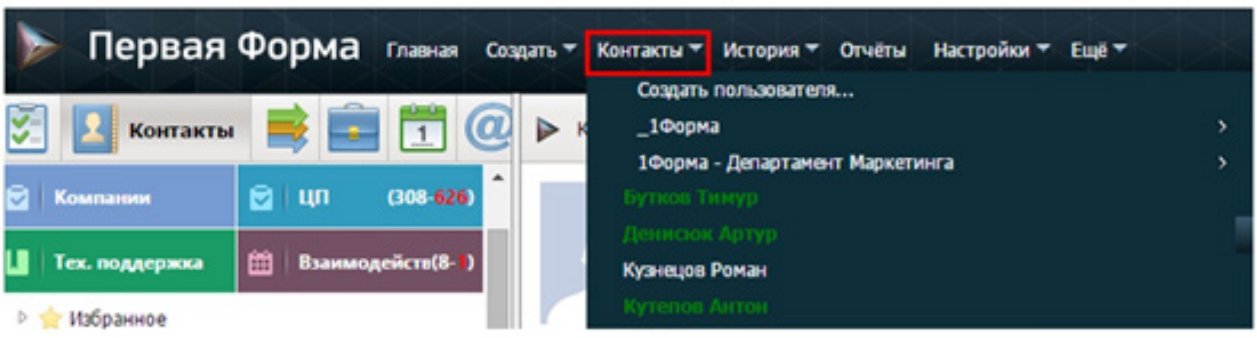
Every employee's details are aggregated in his personal page called "User Profile". It displays not only contact data, job title, relating to the unit and groups, but also data on his tasks, meetings, actions (the sub-menu "Details"). For example, the manager can assess how efficiently his subordinates work. He can assign a task, start a chat or record an absence directly from the user profile.



In the right upper corner a dynamic tag cloud is automatically generated, where the largest font displays the users that interact most often with the employee in the 1FORMA system. The tag cloud allows him to establish contacts with the required users, user names are displayed as hyperlinks, their use enables him to view their profiles.



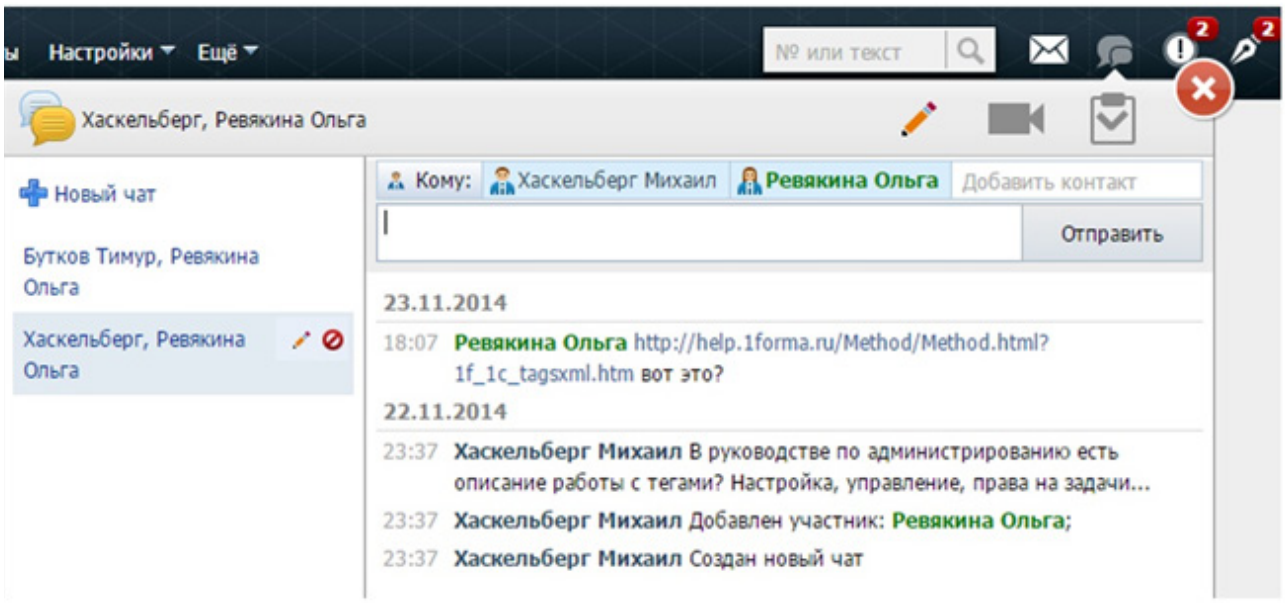
Another convenient tool for establishing a contact with the required employee is the contact history. It can be viewed by clicking the “Contact” item of the main menu. The contact history is also dynamically generated and regularly updated (users being online at the moment are indicated there in green).



4.3.3 Message Exchange

An integrated chat mechanism is convenient for online message exchange. The number of active chats, where the user participates, is displayed on the signal indicator in the right upper corner of the screen:

An unlimited number of participants can be invited to a chat. The same user can simultaneously participate in several chats.

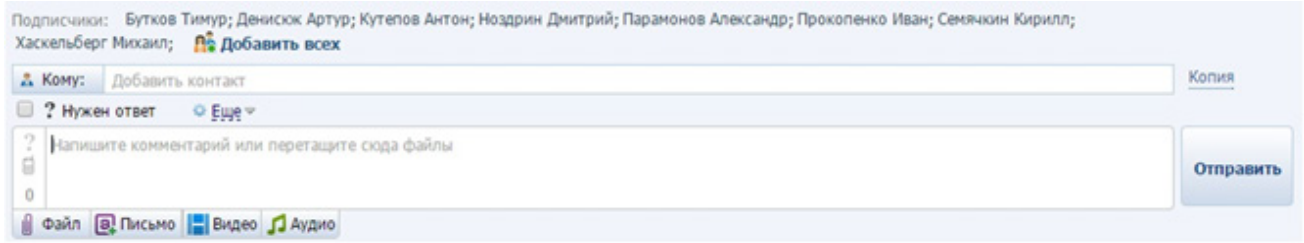


The chats are stored in the system as tasks in the "System" section in the category "Communication". They have only two statuses: "New" and "Completed". Only tasks with the "New" status are displayed in the chat window.

4.3.4 Use of Comments in Tasks

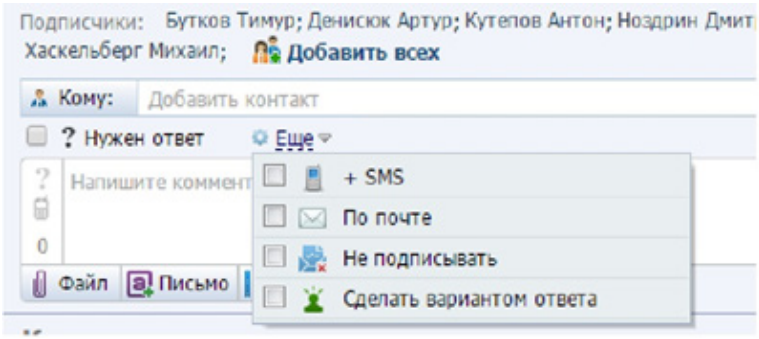
Most of communications between employees in the course of task execution are done using their comments in a task card. The comments provide keeping of the entire discussion history related to the task, which enables restoring the decision-making logics, determine responsible employees and evaluate each employee's contribution. After sending a comment, the system instantly generates related notifications that help all interested employees directly follow task progress and promptly make their proposals. If a comment has specific recipients, the notices will be sent only to them; if recipients are not specified, all task subscribers will receive notices.

Comments marked as questions requiring answers are monitored in a special way: they are marked with a different color, and in the "Stream" representation they go to the "Outgoing" tab for a sender user, and to the "Incoming" tab for a recipient.



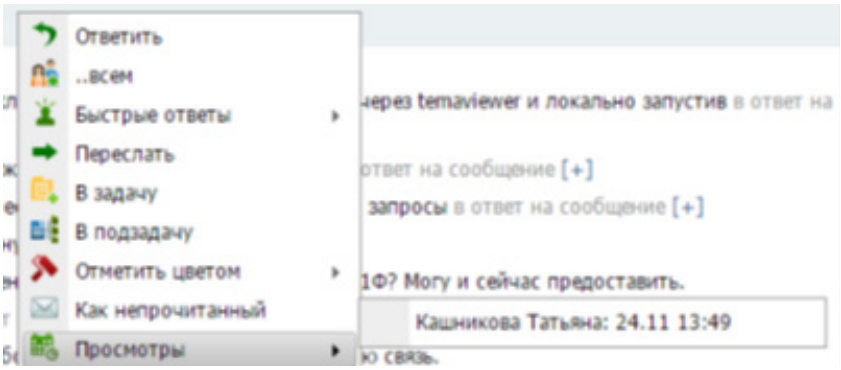
Files can be attached to comments, in this case the system saves not only the recent (updated) version of the attached files but also all their previous versions.

If required, sending a comment in the 1FORMA system can be duplicated in SMS and e-mail.

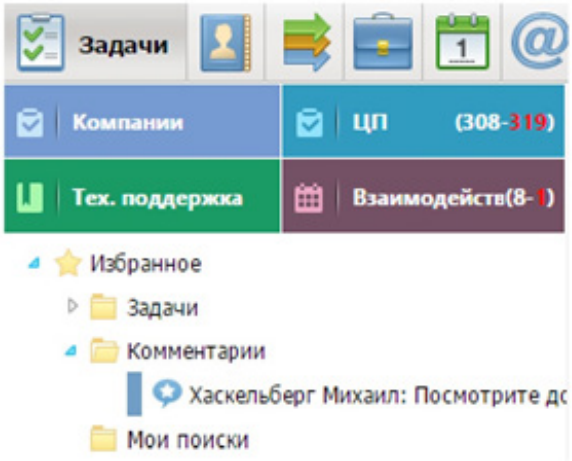


A convenient tool for work with comments is an option to see who and when has read it.

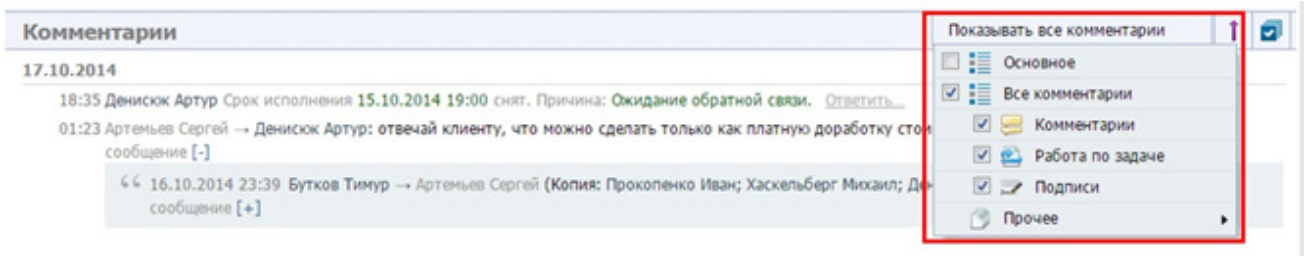
Due to such checking option an employee cannot say that he did not see the message sent to him:



The comments containing the information important for further use can be marked with a different color (using a context menu opened by right clicking). Such comments are added to the "Favorites":

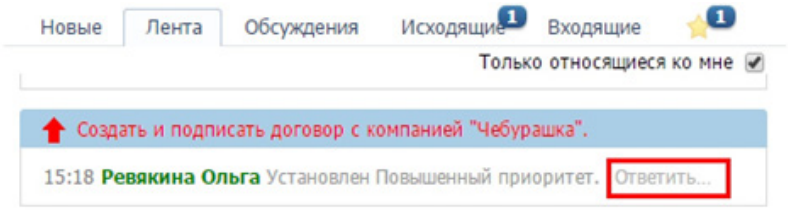


A user can individually customize the details of comment, which he will see in a task card and receive the respective notices of. For example, a manager cannot constantly monitor the task discussion stream, but he can receive notices of the task transition to the next status.



4.3.5 Replies in Comment Stream

The Comment Stream is a useful communication tool, because it allows a user not only to quickly view the received questions and answers, but also immediately comment on them. There is no need to open a task card for this; it can be done directly from the comment stream interface:



4.4 External Communications (“Personal Accounts”)

If a company has external counterparties (customers, partners, suppliers, etc.) which are advisable to integrate into business processes more closely, it can be done using the additional “Personal Account” (PA) module.

The “Personal Account” is a separate website deployed in the company’s IT infrastructure with the Internet access to it. The site may function individually or may be integrated into the main company website using corporate identity-themed design. The “Personal Account” users not registered in 1FORMA receive a login and password to be authorized in the module.

The “Personal” account contains the categories corresponding to the categories of 1FORMA. A document corresponds to a task in 1FORMA.The data entered into the “Personal Account” are displayed in 1FORMA practically online (and vice versa). Hence, the company can flexibly customize the access to its data and processes for external users, concurrently ensuring data safety and relevance.

Using the “Personal Account” an external user can do as follows:

- view up-to-date information on his invoices, contracts;
- generate and print a document;
- enter data (for example, meter readings);
- view the history of the previously entered data;
- view the history of accruals and payments;
- create a request, complaint, question;
- get acquainted with the company announcements and news;
- send and receive a document in any electronic format.

4.5 Manager Services

Deputies and Assistants

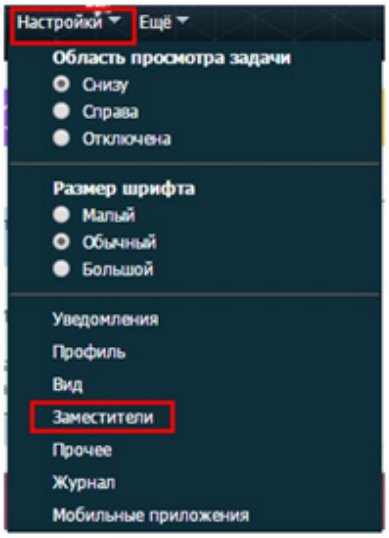
Notices

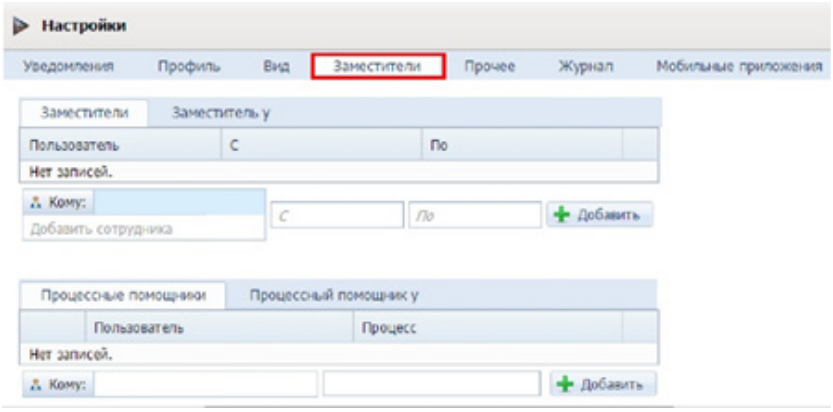
Subordinates' tasks

Analysis of performance results

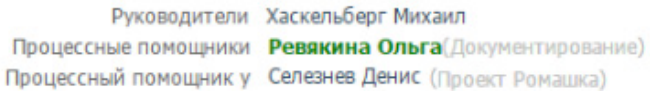
4.5.1 Deputies and Assistants

In order to ensure uninterrupted business operation during CEO's or responsible officer's absence, 1FORMA allows an appointment of a temporary alternate or deputy for such person (for the period of his vacation, sick leave, etc.). For this period, the deputy acquires full manager's authority, all comments, notices, and accepts are redirected to him. A manager may appoint a temporary deputy in the personal settings, in the tab "Deputies".





A manager often has several assistants, between whom the responsibilities are divided: each assistant is responsible for specific business processes. Such division can be established by appointing process assistants (it is also performed in the tab "Deputies"). If such information is entered into the system, it is displayed in the manager's profile (parameter "Process Assistants") as well as in the assistant's profile ("Process Assistant"). Such settings do not grant any additional rights and has exclusively information purpose.



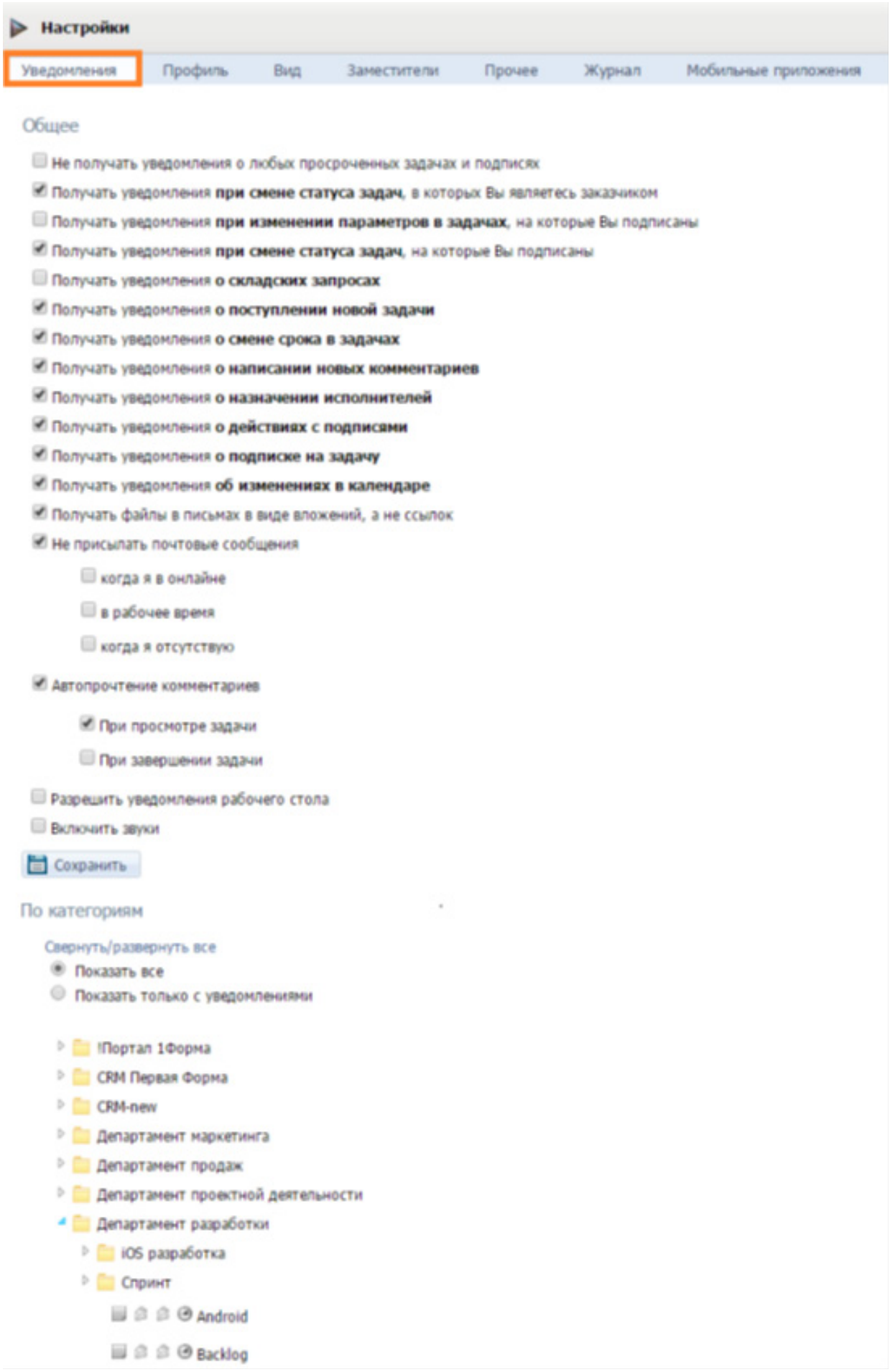
4.5.2 Notices

The main objective of the manager is to monitor production task execution, in order to continuously provide immediate information on accuracy and timeliness of such task performance.

The manager always has access to the tasks of his subordinates. However, **it is not recommended** to subscribe for all subordinates' tasks or to be added to the co-assignees (except particular cases, where direct participation of a manager is required).

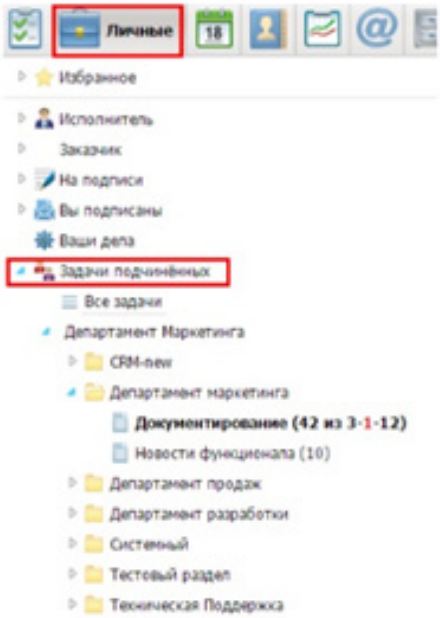
Convenient tools for work progress monitoring are comment notices received by the manager, in case of occurrence of specific events (e.g. creation of a new task, change in time limits or other task parameters, signature-related actions, etc.).

Notices can be customized for the entire system or tasks of the specific categories.


Настройки
Уведомления
Профиль
Вид
Заместители
Прочее
Журнал
Мобильные приложения
Общее
Не получать уведомления о любых просроченных задачах и подписях
Получать уведомления при смене статуса задач, в которых Вы являетесь заказчиком
Получать уведомления при изменении параметров в задачах, на которые Вы подписаны
Получать уведомления при смене статуса задач, на которые Вы подписаны
Получать уведомления о складских запросах
Получать уведомления о поступлении новой задачи
Получать уведомления о смене срока в задачах
Получать уведомления о написании новых комментариев
Получать уведомления о назначении исполнителей
Получать уведомления о действиях с подписями
Получать уведомления о подписке на задачу
Получать уведомления об изменениях в календаре
Получать файлы в письмах в виде вложений, а не ссылок
Не присылать почтовые сообщения
когда я в онлайне
в рабочее время
когда я отсутствую
Автопрочтение комментариев
При просмотре задачи
При завершении задачи
Разрешить уведомления рабочего стола
Включить звуки
Сохранить
По категориям
Свернуть/развернуть все
Показать все
Показать только с уведомлениями
!Портал 1Форма
CRM Первая Форма
CRM-new
Департамент маркетинга
Департамент продаж
Департамент проектной деятельности
Департамент разработки
iOS разработка
Спринт
Android
Backlog

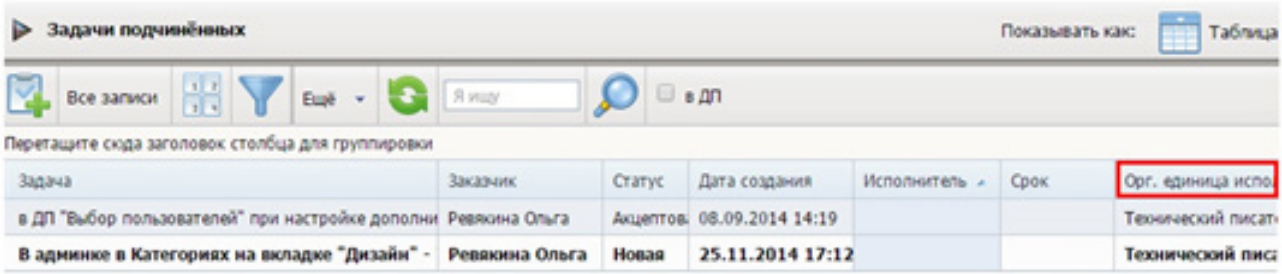
4.5.3 Subordinates' Tasks

The aggregate section "Subordinates' Tasks" is convenient to use for viewing subordinates' tasks in the "Personal" mode (this section is displayed only for employees having a manager's role):



It is convenient to view the subordinates' tasks both in the Stream and Summary modes. When viewing in the form of a Gantt Chart, labor costs related to the task are displayed next to the bar representing the task.

For viewing in the Table mode, it is convenient to use the field "Assignee's Org. Unit". It helps to select tasks according to business units:



4.5.4 Work Performance Analysis

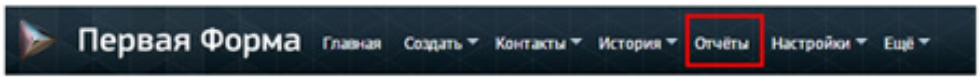
1FORMA System offers a user not only data storage, but also analytical tools enabling evaluation both the performance results of a group of employees and an individual employee.

The data analysis is performed at the initiative of the manager and provides the following information:

- implementation of the management decisions,
- cost-effectiveness or cost of the existing or newly applied methods/mechanisms,
- work effectiveness of a unit or individual employees,
- projects statuses, time of their completion, labor costs, etc.

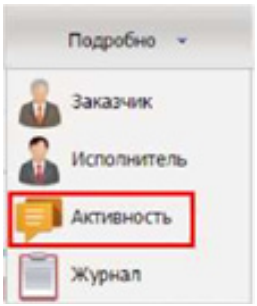
To conduct data analysis, first of all, it is necessary to understand, which data are required, and determine the sources of the data. The data sources are sections and categories, because the tasks are kept there. Depending on a request, the analysis criteria may be as follows: a period, responsible assignee or group of assignees, category or section to be analyzed, task status, etc.

Some types of data analysis can be conducted using standard reports. In order to generate a report, a user should specify the data selection criteria.

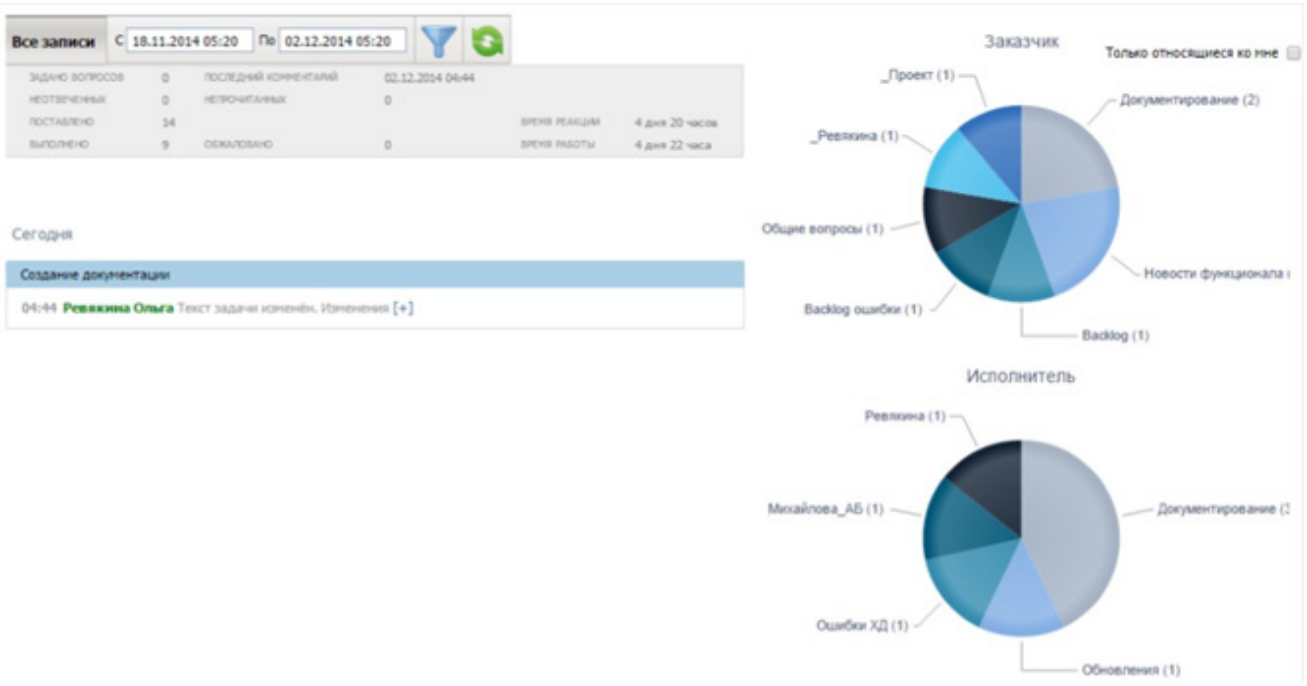


The report results can be presented in the form of a table or diagram. The obtained data can be saved by the user in the form of Excel tables.

In addition to reports, statistical data can be obtained directly from user profiles by using a menu in the right upper corner of the profile window:



The statistics is represented in the form of tables and circular diagrams.



4.6 Instruction Sheet "I am an Assignee"

Problem or Task	Operations in 1FORMA
Beginning of the Working Day	
Check if I have overdue (i.e. disrupted) assignments	• Check the overdue task indicator, go to the overdue task list. • View the aggregate section "Assignee" section, use filtering or sorting for a completion date in a common task list, or determine overdue tasks visually (displayed in a red font).
Determine, which works I should complete today and at the earliest date	• Go to the aggregate section "Assignee", use filtering or sorting for the field "Completion Date" (taking into account the "Priority" field) in the common list. • Select the tasks with the earliest completion date and start performing them. • Select the tasks that cannot be executed by the specified date and extend the time as agreed upon with a manager, task giver or other interested employees.
Plan my working day	• Go to the aggregate section "Assignee" and analyze new and nearest tasks (see the paragraph above). • Go to the calendar, view the scheduled meetings; view common calendars with co-workers in order to select the dates for joint arrangements (meetings, briefings), if required.
Reply to incoming requests for approval of tasks or documents	• Check a requested signature indicator, go to the requested signature list, make a decision if it is possible (give or decline an accept).
Work performance	
Start your work with the task	• Got to the relevant task, push the button "Begin" (or a button with a similar meaning).
Check co-workers' incoming messages addressed to me	• Check a comment indicator and go to the New Comments stream, or check the Main Stream, the tab "Incoming". • Read the comments directed to me. If the comment has the notification nature, "read" it (click it). • If the comment is marked as a question or requires a response, reply to it directly from the list (stream) without entering the task card. • If the comment requires a careful analysis of the situation, open the task in the working area and perform the required work.
Monitor tasks and assignments received for my performance	• Check a comment indicator and go to New Comments stream. All task received for executing by me are displayed in the Stream. • View the aggregate section "Assignee", use filters and sorting in the field "Status" in the common list to select new tasks. • If the task can be executed quickly, immediately put it into the work, perform all required operations and finish it. • If work completion requires some time, include it into the work schedule and fix the appropriate time for the beginning of work on the task.

Problem or Task	Operations in 1FORMA
Discuss the task solving, organize joint work on the task	• Use comments in the task card (instead of e-mail correspondence) addressing the messages to the respective employees. • Create a chat with the concerned employee for online discussion. • Plan a meeting using the calendar. • If necessary, establish connections with other tasks, which in any way "overlap" with the performance of the given task.
Set up a meeting, briefing	• View my calendar and co-workers' common calendars in order to select the time suitable for them. • Create an event (meeting, briefing, presentation) involving co-workers in it, if required.
Divide a complicated task into separate steps/ stages	• Create a required number of sub-tasks, involve other employees in their performance, if necessary.
Inform the co-workers	• Designate co-workers as the subscribers for the task, in order to regularly inform them on its results or progress. • Organize a group chat. • Distribute the comment for a group of employees in the task card.
Record the fact of completion for a task or assignment	• Go to the relevant task, click the transfer button "Complete" (or a button similar in meaning).
Keep a record of my working hours	• Record the working hours spent for the task completion in the task card in the section "Labor Costs". • Record in the system all types of absence (sick leave, vacations, business trips, meetings, remote working, etc.) in the form of calendar events.
Recording the responsibility for accepted actions	
Request the consent of a responsible employee for a difficult or complex task	• Request a dynamic signature from the task card, describe the essence of the issue, exactly what kind of operation requires an approval (the reason for a signature request).
Make a decision on an important issue directed to me	• Check the requested signature indicator, go to the requested signature list, make decisions on the issues (give or decline an accept).
Transfer the task to the next stage of its implementation	• Go to the task card and click, by the meaning, one of the route transition buttons, in accordance with the current situation.
Delegate the responsibility for the task performance to another employee	• Delegate the task (i. e. change the assignee).
End of the Working Day	
Make sure that all works planned for today have been completed	• Go to the aggregate section "Assignee", use filters and sorting with the "Due Date" field in order to select the tasks that had to be completed today.

Problem or Task	Operations in 1FORMA
Make sure that all answers to co-workers' questions have been provided	• Check an incoming comment indicator. If it has nonzero value, go to the New Comment Stream and answer all incoming questions.
Analyze the results of my work	• Use the statistics data in the user profile. • Use standard reports.

4.7 Instruction Sheet "I am a Manager"

Problem or Task	Operations in 1FORMA
Beginning of the Working Day	
Plan my working day	• Go to the consolidated section "Assignee" and analyze new and immediate tasks, where I am mentioned as an assignee. • Go to the calendar view, view the scheduled meetings; view common coworkers' calendars to choose the dates for joint arrangements (meetings, briefings), if they are required.
Reply to incoming requests for the approval of tasks or documents	• Check the indicator of requested signatures, go to the requested signature list. • Make a decision for each request (give or decline an accept), either directly in the waiting signature list or (if the issue needs deeper consideration) by opening the task and analyzing its contents.
Assess the work progress according to the business procedures within my scope of competence	• Go to portal pages with the prepared analytics (graphs (diagrams), tables, records) and task lists. Assess the work progress in quantitative and qualitative terms.
Operational Activities	
Answer incoming requests of co-workers and subordinates addressed to me	• Check the comment indicator and go to the New Comment Feed, or check the main Feed, the "Incoming" tab. • Read the comments directed to me. If the comment has the notification nature, "read" it (by clicking). • If the comment is marked as a question or requires an answer, reply to it directly from the list (stream) without entering the task card. • If the comment requires a careful situation analysis, open the task in the working area and perform the required works.
Set a mission to the subordinates	• Select one of the system categories corresponding to the content of task assignment. If the task has a general nature, choose the "Personal Task" category. • Create a new task. Specify the subject of the work, assignee and required completion date there. • Click "Set the Task" or "Save" button.

Problem or Task	Operations in 1FORMA
Monitor how my task/assignments are performed	• Go to the aggregate section "Task giver" and analyze tasks and assignments initiated by me. • Determine the presence of overdue assignments (visually displayed in a red font). Initiate a dialog with the assignee in order to determine and solve problems by writing comments to the tasks. • Use category selection in the tree and grouping/sorting by the "Status" field, in order to obtain more accurate information on the progress of specific work.
Discuss a solution for a difficult/complex issue, organize joint work on the task	• Use comments in a task card (instead of e-mail correspondence) addressing a message to the relevant employees. • Create a chat with the employee for online discussion. • Plan a meeting using the calendar
Set up a meeting, briefing. Organize my working time	• View my calendar and co-workers' common calendars in order to select the required time. • Create an event (meeting, briefing, presentation) involving co-workers, if required. • Create an event (sick leave, vacation, business trip, meeting) to represent my own schedule of activities.
Divide a complicated task into separate steps/ stages	• Create a required number of sub-tasks, involve other employees in their performance (by appointing assignees).
Inform the subordinates and co-workers	• Designate co-workers as subscribers for the task, in order to regularly inform them on its status and progress. • Organize a group chat. • Distribute a comment in a task card for the group of employees. • Create an announcement (in the presence of the related category).
Analyze the tasks received for the business unit and allocate them between the assignees	• Go to the category corresponding to the required business process. • Filter the tasks with the "New" status and without any appointed assignees. • Open each task, analyze its essence. Appoint an assignee.
Make a decision on the important issue directed to me	• Check a requested signature indicator, go to the requested signature list, make decisions on the issues (give or decline an accept).
Delegate the responsibility for performance of a particular task to another employee	• Change the assignee for the task.

Problem or Task	Operations in 1FORMA
Analysis of Business Process statuses and Business Unit activities	
Supervise the work of my subordinates	• Go to the aggregate section "Subordinates' Tasks". • In a common task list use filtering, grouping or sorting with the statuses, assignees and completion dates. • Determine the current work status: which tasks are performed by the subordinates, check if there are any overdue tasks (visually displayed in a red font), etc. • Use standard reports.
Assess the current state of work according to the specified business process	• Go to the category corresponding to a specified business process. • After grouping tasks with the "Status" field, assess the current work performed within the scope of the relevant process. • If necessary, use additional groupings, sorting and filtering in the table to obtain the fullest understanding.
Monitor performance of the specified business process	• Go to the category corresponding to a specified business process. • Select the "Stream" view. Assess current comments and events in the system, if required interfere into the work progress by writing comments to the assignees (directly from the Stream) or by creating new task assignments.
Supervise the communication structure and the subordinates' activities structure	• Make a search with an employee's last name, go to his profile. • In the right upper part of the window, analyze, with whom of co-workers this employee interacts most often, make a conclusion. • In the menu "Details", select additional pages for analysis: • The "Task giver" - representation of the tasks initiated by the employee; • The "Assignee" - information on the tasks performed by this employee; • The "Activity" is a graphic representation of the employee's work structure (what type of work is the most time-consuming); • The "Registration Log" is the information on employee's working day (registration time in the system).
End of the Working Day	
Make sure that all answers to co-workers' questions have been provided	• Check the incoming comment indicator. If it is nonzero, go to the New Comment Stream and answer all incoming questions. • Check the requested signature indicator. If it is nonzero, go to the requested signature list and make a decision on them (give or decline an accept).
Analyze the work results	• Use standard reports. • Use the portal pages containing the analytics.

V Business Communication Ethics in the 1FORMA System

When using the 1FORMA System, it is recommended to observe the general rules of work that help to implement the uniform principles of business process implementation, arrange the employees' cooperation and supervise their work efficiency.

General Principles

1. All business communications between the company's employees, such as current tasks discussion, information exchange, making appointments, document approval, project implementation planning and supervision etc. shall be made within the 1FORMA System, and using the 1FORMA functionality.

2. All documents related to the current business processes and tasks (including text documents, images, electronic spreadsheets, presentations, e-mails, etc.) shall be enclosed in the relevant tasks and stored in the system. Tasks shall always contain the recent versions of documents, i. e. when changing documents, the updated versions shall be timely imported to the system by the employees, who made these changes or by the persons responsible for the document relevance and compliance.

3. All messages made in the system shall be as short as possible, but, given that, as informative (clear and complete) as possible. It is recommended to use business and professional vocabulary, and avoid slang as much as possible (unless otherwise caused by the specific character of the company operation), and adhere to the polite communication style.

Employee Information

1. All company employees registered in the 1FORMA System shall make sure that their user profiles contain the fullest and relevant information, such as their job position, belonging to organizational and functional units (departments, business units, divisions) as well as contact information: corporate and external e-mail, office and mobile phone numbers, etc. All changes shall be promptly entered into a user profile individually or with the assistance of system administrators.

2. Employee's absence at a workplace during the period more than one hour shall be timely (in advance, if possible) reflected in the system. For this purpose, the functionality creating events/ absences is used, helping to record meetings, business trips, vacations, sick leaves, etc.

Work with the Tasks

1. All tasks created by the employees shall be recorded in the respective category and section/subsection that maximally comply with the essence of a task (taking into account employees' access rights). If the task cannot be referred to any specific category, it is placed into the "Personal Tasks" category.

2. An employee shall keep the information updated with the recent data on the current state for the tasks, where he is a task giver and/or assignee. If several assignees are appointed for a task, the data monitoring of data relevance is assigned to the responsible assignee. It is necessary to ensure the relevance of the information on the task current status, work commencement and completion dates, assignees and subscribers.

3. If an employee is given a new task (where he is mentioned as an assignee), he shall, within one day, either begin the task performance (as a rule, it is required to click "Commence" button), or adjust the work commencement time and date, or refuse to execute it (by clicking the "Decline" button). In case of date extension and task rejection, it is required to provide a reason for these actions.

4. If an employee receives a new request or comment that requires a feedback, he shall reply to it or redirect the comment to another employee within one day.

5. At the end of the working day, an employee shall not have overdue tasks left. In case it is impossible for an employee to complete the task on time, he shall extend the completion date and comment on the reason for this extension.

6. If an employee's signature is requested, he shall accept the task or decline the signature, giving a comment with the reason for his declination. This decision shall be made within one day (unless otherwise provided by company regulations or a specific business process).

7. If the tasks are interconnected, these connections shall be displayed in the system using the functionality of sub-tasks, related tasks or project management.

8. If the company keeps records of labor costs, it is recommended that the employees should enter labor costs for their performed tasks daily at the end of the working day, or upon completion of work (or a work stage) on the task.

9. After the completion of all work, the task must be completed in the system.

10. A task is used in order to record a one-time action. If an employee's goal requires performing further and more difficult actions, a set of the project management tools is used.

Algorithm for New Task Analysis

1. You have received information in the 1FORMA System. Firstly, it is required to determine, if you are a correct recipient, and whether the received information requires from you taking specific actions. Actions are not required if the received information is a spam, general information message, reference material, task with a specified commencement date in the future. In these cases (except a spam), you will return to this information in the future, if necessary.

2. If the incoming information is the appropriate information addressed to you, and certain actions are required from you, the next step is to determine whether this information is a project or a task.

3. The required actions for project work:

to plan the project, considering its main parameters (objectives, time limits, resources, milestones (main stages), tasks and sub-tasks (operations). To create a project in the required category, specify its goal (it shall be visible to all project participants), set out the date of the entire project completion, record the main milestones (stages) of the project, appoint the responsible assignees (resources) for each stage, and set their tasks and sub-tasks (smaller actions), if necessary.

4. If the received information is a task, estimate, how much time you will need for its completion. If completion of the received tasks requires less than two minutes, perform it immediately and complete informing the task giver. If the task completion requires more than two minutes, you can:

• delegate the performance of this task to a new responsible assignee, in this case you need to check the final task performance result;

• determine a possible task commencement date (in accordance with your current workload and priorities) and extend the task date informing the task giver on the date extension with mentioning the reason for the extension.

5. Delegation. The first characteristic of the delegation is that the nearest operation will be performed by another person. The tasks, that have been delegated, are planned not by yourself but by a new assignee. The faster a new task will be delegated, the sooner it will be completed. When delegating, you can not only set a task but also suggest the most efficient ways of its performance, and in case of any delay, seek opportunities to speed up the process. The employee, who initially set the task, is responsible for the final project result.

When planning, it is important to remember that:

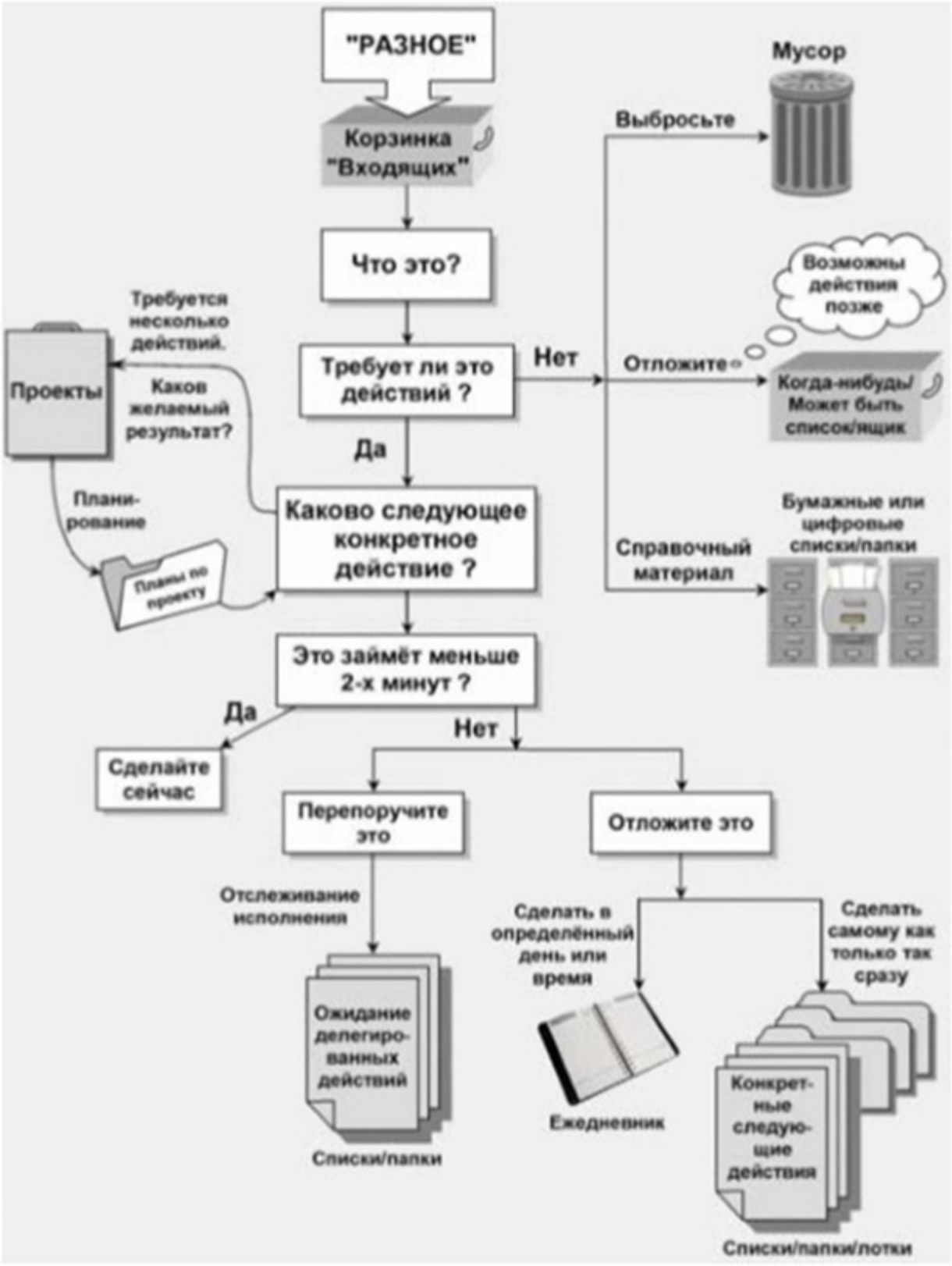
• in 80% of cases the tasks take more time than it was initially planned;

• the tasks requiring more than 1 hour to complete are recommended to be budgeted (to reserve time in the working calendar);

• it is not recommended to plan in the calendar more than 60% of working time;

• when planning the next day, first of all, it is required to read and understand the tasks that have been planned for this day before.

Task Work Algorithm Chart



VI Glossary

Accept (signature) is a consent given by the user to performing a specific action.

Acceptant is a user, who is requested to give an accept.

Business Process (BP) is an established sequence of actions in order to meet a specific goal.

Virtual Section is a categories' group formed according to any specific characteristic (e.g. "All Categories").

Dynamic Signature is a single-use accept requested in the course of task execution (differs from a standard accept, which is customized in advance during the route planning and is always requested at the given route stage).

Additional Parameter (AP) is a task parameter individually set for a specific category.

Task is a minimum atomic (indivisible) meaningful work, which is performed by a responsible employee for the company benefit, the result of which may be checked.

Task giver is a user, who initiates execution of a specific task. He is usually indicated in the field "From" of a task card.

Assignee is a user entrusted with responsibilities for execution of a specific task. He is usually indicated in the '"To" field of the task card.

Task card is a window of the specific design, where task parameters are displayed..

Category is a group of one-type tasks with the same structure, routes, settings.

Comment is a message made in the task card. It has an author, it may have its recipients, may contain text information, enclosed files. It may be marked as a question that requires an answer.

Context Menu is a menu opened by clicking the right mouse button on the relevant item (it may be a context menu of the section, portal, etc.)

Personal Account is an additional module made to interact with external counterparties (clients, partners, customers); it is closely integrated with the 1FORMA system.

Route is a task life cycle; a business process described as a sequence of transitions and statuses.

Organization Structure is an organization structure of the company, usually represented as a hierarchy of business units and job positions.

Main Parameter is a task parameter, necessarily attributed to the task in all categories.

Report is consolidated data selected according to the specified criteria and processed using previously set algorithms.

Control Panel is a set of functional icons, clicking which specific actions are performed in the system.

Subscription is a composite function of generating change notifications related to the task.

Subscriber is a user interested in a specific task execution and monitoring the course of its execution.

User Profile is a card containing the main user data including contact details, job position in the organization structure (job title, unit), etc.

Section is a group of categories combined according to the associated functions.

Role is a set of user's authority required to perform specific functions under the certain BP (task giver, assignee, subscriber, acceptant).

Aggregate Section is a group of categories combined according to a certain characteristic to make user's work more convenient.

Signal Indicator is a pictogram displaying the current status of one of the key user's work parameters (the number of unread comments, requested signatures, delayed tasks). Signal indicators are located in the right upper corner of the screen.

Status is a task parameter that characterizes its current position in the business process.

Chat is an instant messaging module integrated into the 1FORMA system.

1 Signatures and Subscriptions (clarification)

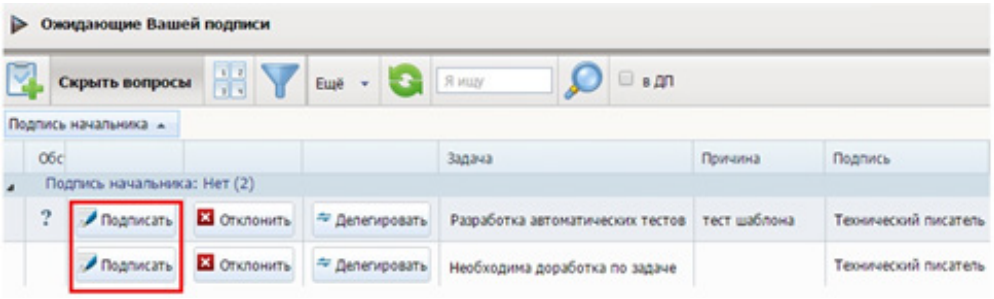
Two frequent terms are close judging by their pronunciation (in Russian), but different in terms of their meanings as they are used in the 1FORMA - "Signature" and "Subscription".

Signature (accept) is a confirmation of the decision made by the user. User's signature means his consent to performing specific operations in the task (the signature usually goes with the transition of the task into the next status). The user giving or declining his signature is called an ***acceptant***.

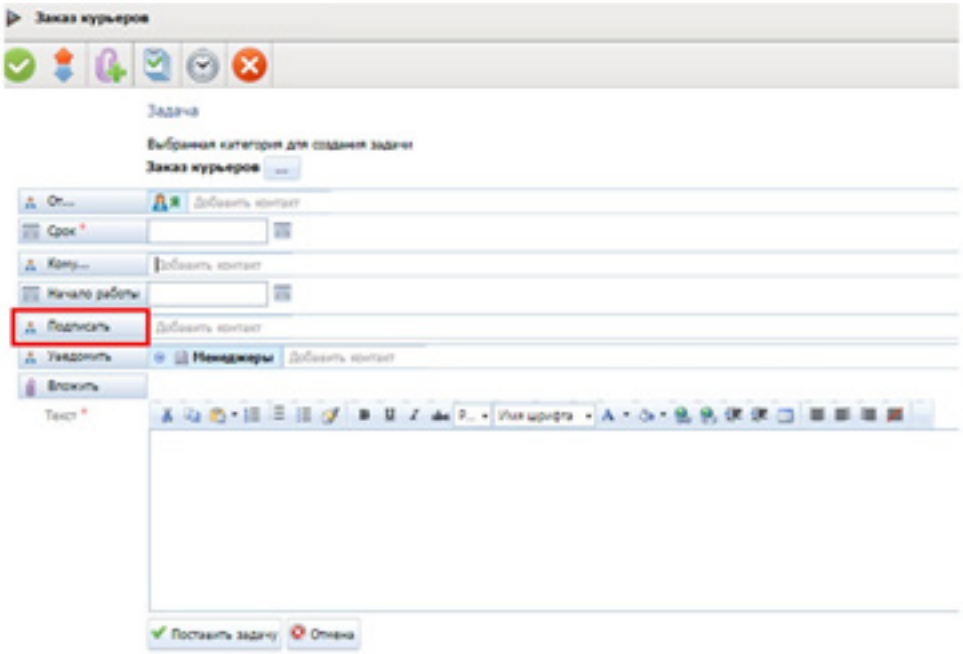
Subscription is a mechanism allowing the user to reveal his interest in the course of the performance of the specific task and his wish to receive notices on the changes taking place in this task. The user, for whom the subscription is executed, is called a **subscriber.**

Accordingly, the verb "to subscribe" can be used in the system in two different meanings:

• "to sign something", i.e. to affix a signature, this meaning is used in relation to the tasks.



• to subscribe (to) somebody", i.e. to make a subscription; this meaning is used in relation to users.



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