WPT3.1 Training and Mentoring activities for CCIs employees

PROJECT NAME: “Business Registry Empowerment” - **ACRONYM**: BRE - **PROJECT NUMBER:** 230

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ORGANIZATION OF A TRAINING FOR CHAMBER OF COMMERCE OF BARI EMPLOYEES

On **7th June 2021** the Chamber of Commerce of Bari and the Chamber of Commerce of Tirana organized a training for Italian Chamber of Commerce foreseen in **WPT3 - Capacity building** under the **Deliverable 3.1 –** "Training and Mentoring activities for CCIs employees".

The training participants were:

- Cosmo Albertini – Chamber of Commerce of Bari
- Nicola Mastropaolo – Chamber of Commerce of Bari
- Franco Simone-– Chamber of Commerce of Bari
- Mina Carpinelli – Chamber of Commerce of Bari

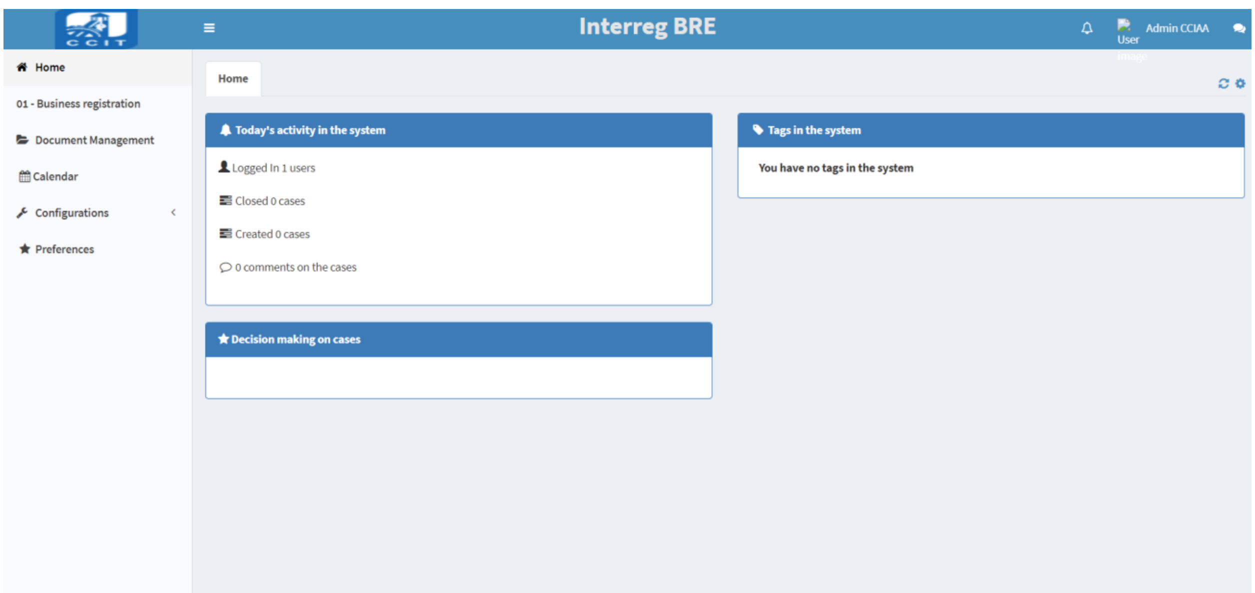
During the training, the Albanian partners explained how to use the **BRE Partner Query Platform** showing the **User Manual report** foreseen by the activity T2.2 - "Platform manual for internal and external usage".

They described:

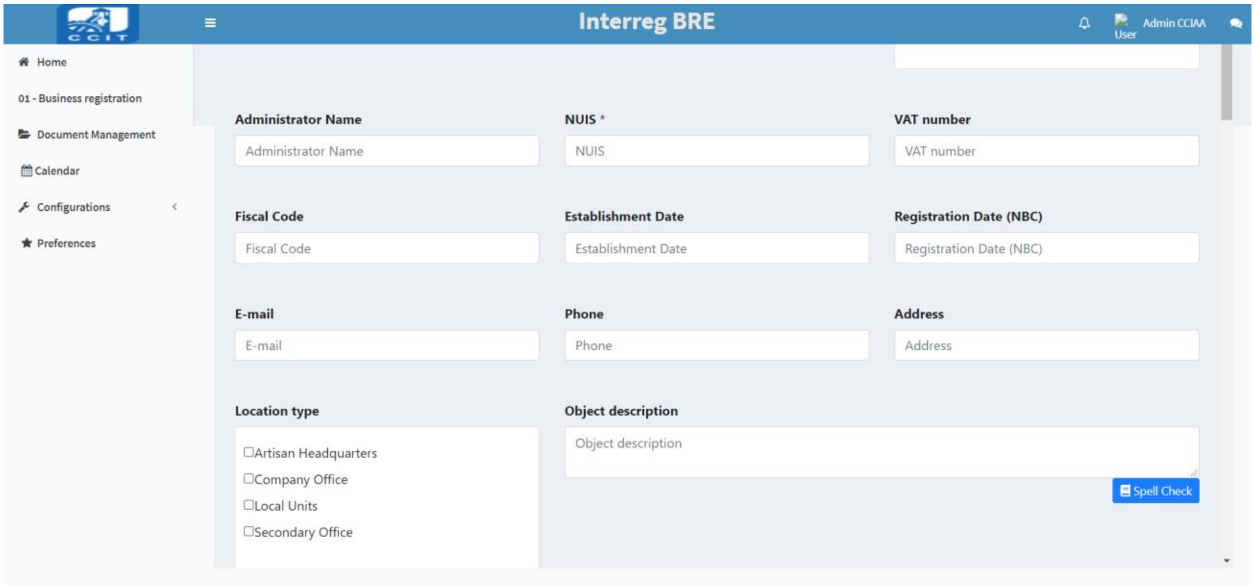
1) How to login in the platform.
2) The homepage contents.
3) The menus implemented to automate and simplify the work process.
4) The workgroups to whom the users are part, depending on the operation and process assigned in the system.
5) The platform configuration able to suit the users needs.
6) The pivot reports that will provide the ability to create summary tables and graphs related to issues created, dynamically.
7) The general functionalities of the BRE Platform (e.g., Advanced Filters, Search Bar, Assign Button, etc.).

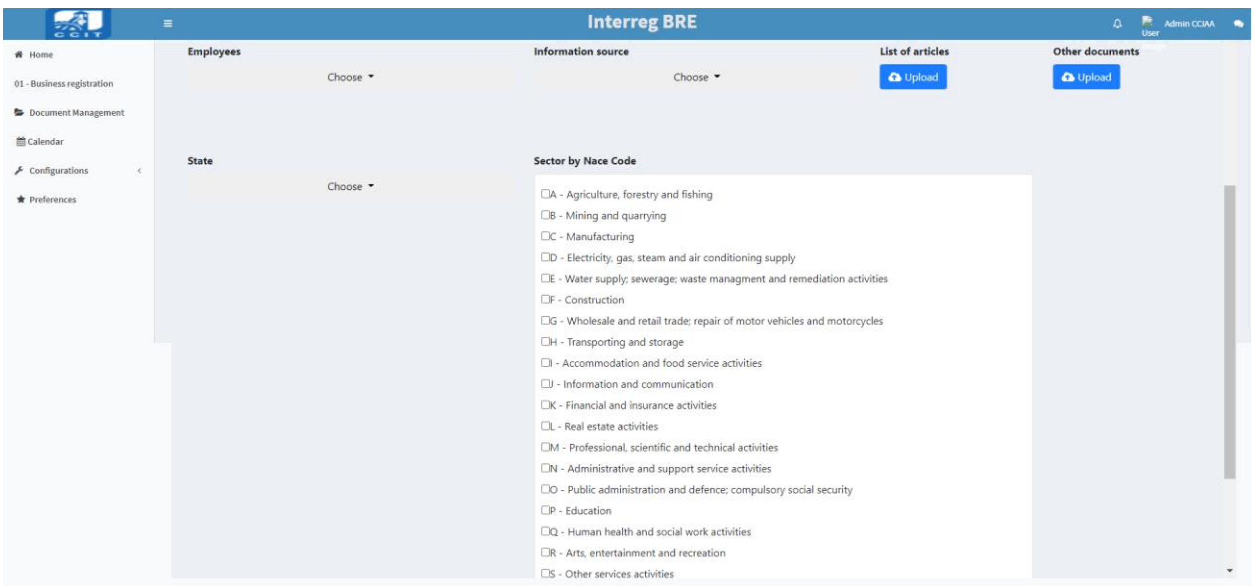
Thanks to this training, Chamber of Commerce of Bari employees had a more clearly view about how to insert information into the BRE Platform.

The backend



How to register a company


Interreg BRE
Admin CCIAA
Home
01 - Business registration
Document Management
Calendar
Configurations
Preferences
Administrator Name
NUIS *
VAT number
Fiscal Code
Establishment Date
Registration Date (NBC)
E-mail
Phone
Address
Location type
Artisan Headquarters
Company Office
Local Units
Secondary Office
Object description
Spell Check


Interreg BRE
Admin CCIAA
Home
01 - Business registration
Document Management
Calendar
Configurations
Preferences
Employees
Choose
Information source
Choose
List of articles
Upload
Other documents
Upload
State
Choose
Sector by Nace Code
A - Agriculture, forestry and fishing
B - Mining and quarrying
C - Manufacturing
D - Electricity, gas, steam and air conditioning supply
E - Water supply; sewerage; waste managment and remediation activities
F - Construction
G - Wholesale and retail trade; repair of motor vehicles and motorcycles
H - Transporting and storage
I - Accommodation and food service activities
J - Information and communication
K - Financial and insurance activities
L - Real estate activities
M - Professional, scientific and technical activities
N - Administrative and support service activities
O - Public administration and defence; compulsory social security
P - Education
Q - Human health and social work activities
R - Arts, entertainment and recreation
S - Other services activities

User Manual

SYSTEM FOR INTERREG-BRE

History of Documents and Changes Versions

Version	Date	Author	Notes on Reviews
1.0	30.12.2020	Denisa Myrta	User Manual

Content

Figures Table

1. Login and registration page

To be able to log in, a panel will appear so you can enter your credentials. You must fill in your data: “user” and “password”, so the system could identify you, the credentials are personal for each user. These data are essential. You will not be able to access the system if the credentials are wrong. If you want to save your credentials (username and password) so that you can access the system without re-entering your credentials, choose the “I remember” option by checking the small box next to it.

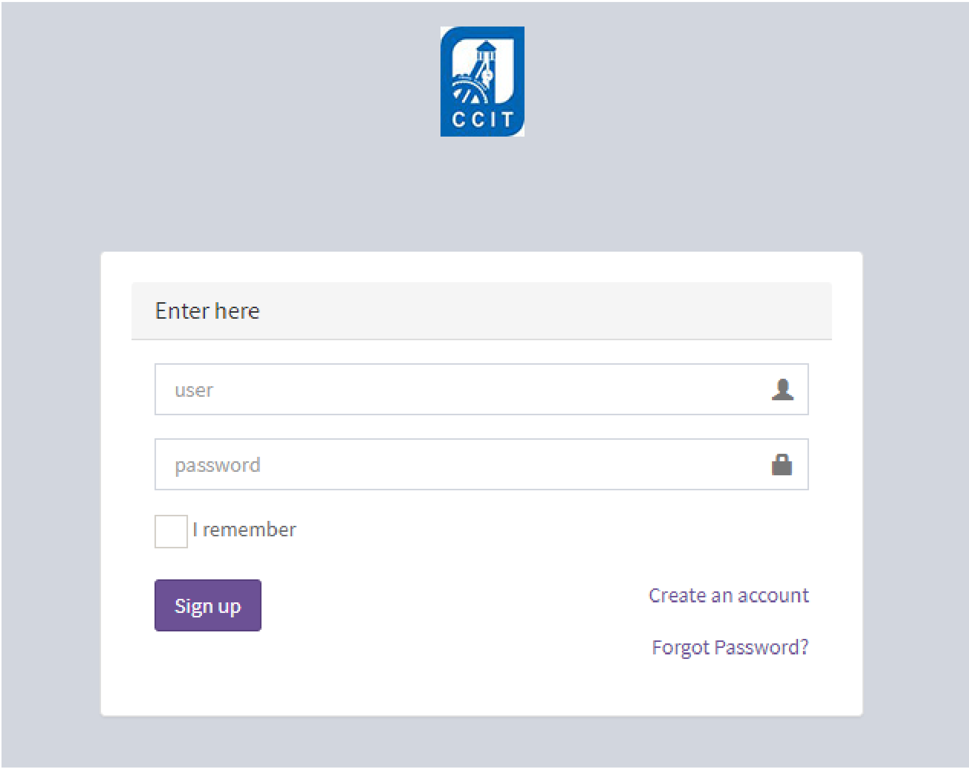


Figure 1. Login Page

Once you have entered the credentials (username and password) and checked the box, click the “Sign up” button.

If the username or password is wrong, a custom dialog will be shown which inform you that the credentials are wrong and you have to try again.

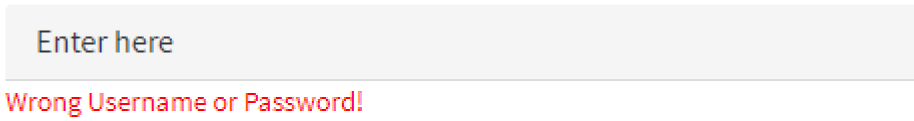


Figure 2. Wrong Username or password

If you do not have an account, just click "Create an account" and the following panel will appear, where you can enter your details for example Name, Surname, e-mail, username, and password, so you can access the system. A security system will not allow you to access the system unless you type the correct characters. In order to confirm and create the account with the details you entered, just click the "Create an account" button.

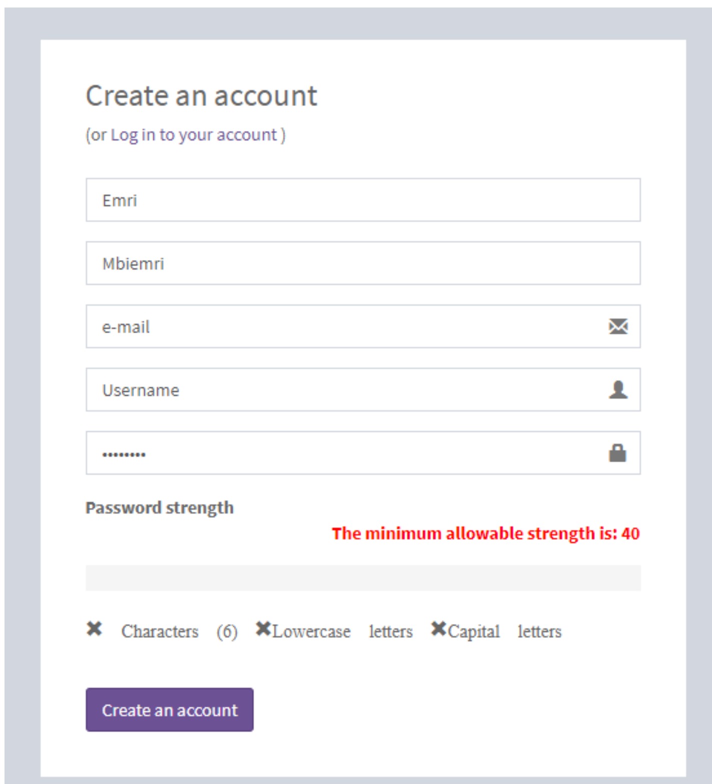


Figure 3. Create an account

Once you sign up, you will be notified that you have to wait to be confirmed as a system user. The moment your permissions are granted by the system administrator, you will get an e-mail confirmation.

If you already have an account, just click on “Log in on your account” and the login panel will appear so you will be able to enter your credentials.

If you do not remember the password, on the login page, you could click *“Forgot password?”* and a panel will appear, where you have to enter the Username and the E-mail, click on *“Change password”* and you will receive a link by email, which allows you to change the password. This link will allow you to change the password only once. If you attend to change the password more than once, a custom dialog will appear which informs you that the link is not valid. Also, the link will expire if you do not use it within an hour. In these cases, you have to repeat the process of “Forgot password” to get another link by email.

If you follow the link and it is valid, a page will be open as in the figure below where you have to enter the new password, after you change the password the user will get an email confirmation.

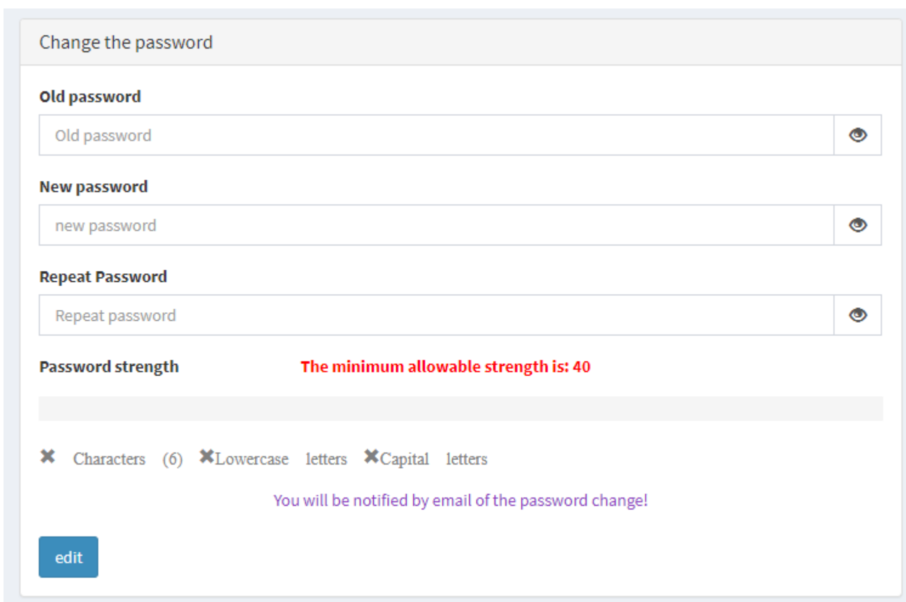


Figure 4. Change the password

Once you login into the system you will be able to change your password by setting a new one. In the account panel, click on the *"Change password"* option as in the figure below:

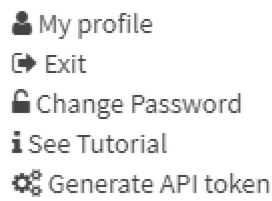


Figure 5. Change password

2. Home

2.1 Home

The homepage contains all the functionalities, easily accessible by each user depending on the privileges he has. The activity interface will display information such as the number of users who have accessed the system at that time, the number of closed issues, the number of issues created, and the number of whole comments.

On the homepage, you will also find notifications of changes made to certain issues. If you have passed issues under consideration or another user has commented by tagging your name, in the ring icon next to your name in the system, a number will appear to show that there are notifications for you. To view the notifications, you need to click on this icon and further open the notification.

The "Home" panel is divided into two sections, and contains some of the main functionalities, as a simpler and faster way to get information about them. The panel on the left has all the main system menus listed.

2.2 Activity in the system today

In the enterprise and activities, you will see displayed the number of logged-in users, the number of closed cases, the number of requests created, and the number of comments of the reported cases to the system. So, in this panel, we get all the information about the daily activity.

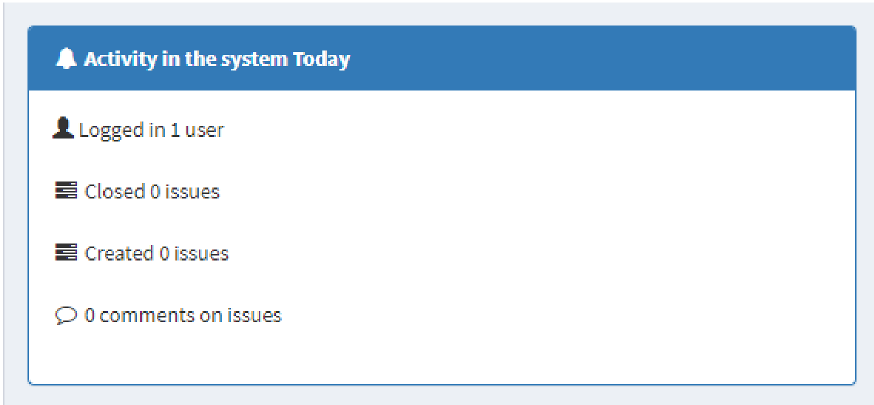


Figure 6. Activity in the system today

Under the *"Mention in system"* section, you will see all the comments from the other users, in which the user who is using the system is labeled. Also, the date and time of the comment will be displayed and the user can open the specific issue where the comment was left by clicking on it

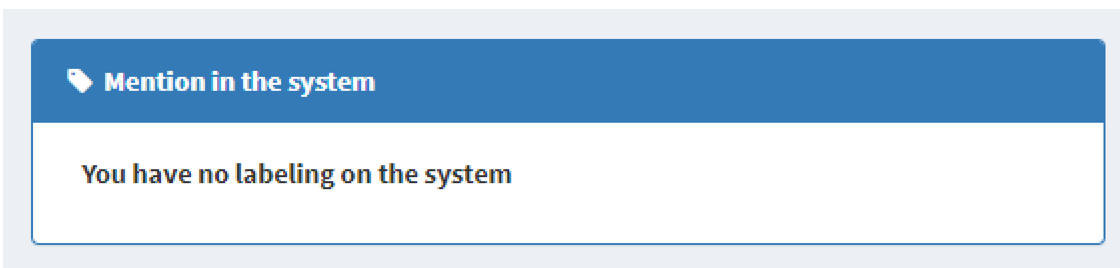


Figure 7. Mention in the system

3. Menus implemented

The Interreg-Bre system is organized in a menu *called "Business Registration"* so Albania, Italy, and Montenegro could have a communication and cooperation line between them. The main purpose is to automate and simplify the work process.

3.1. Business Registration

Business Registration provides an overview of all businesses registered in the system. Businesses are grouped according to their status. The active businesses are in the "Active" section while the inactive businesses are in the "Not active" section. To see all the businesses registered, go to the "All" section.

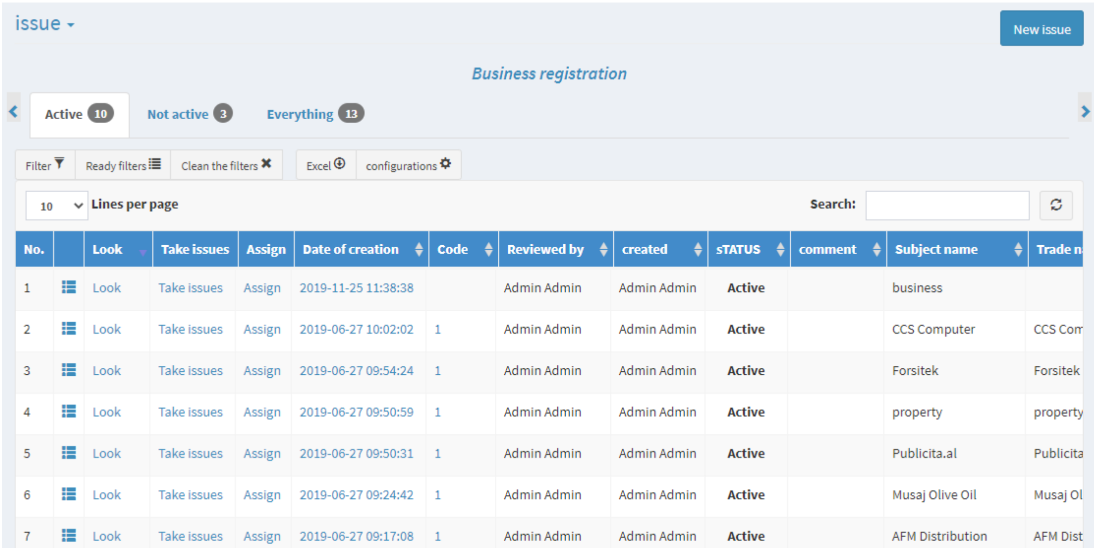


Figure 8. Business list

To add a new business, click the *"New Issue"* button, it will display the fields that need to be filled in for the business, which is categorized into two sections *"General Information"* and *"Financial Information"*.

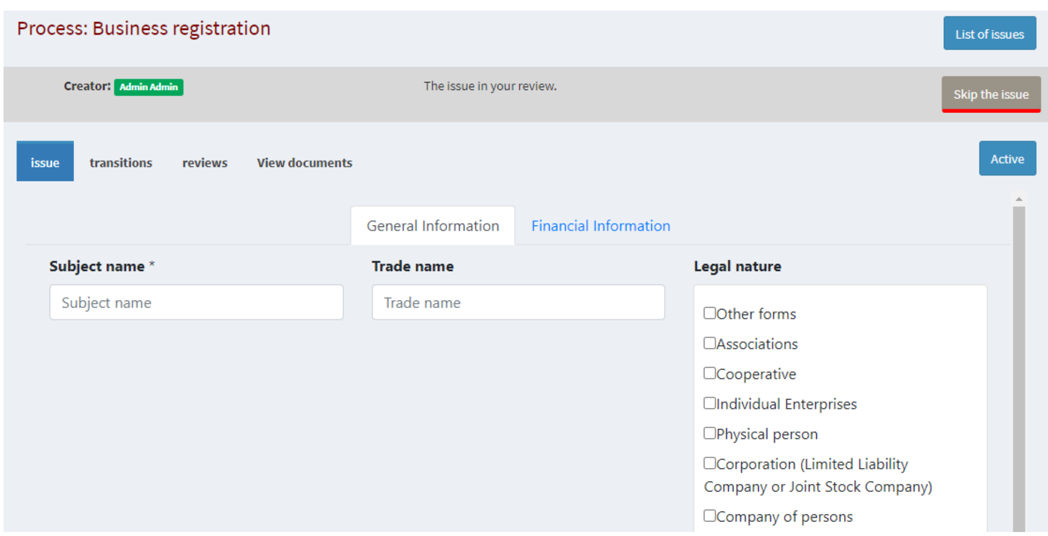


Figure 9. General Information

3.1.1. General Information

In the General Information section, you can fill in the general information about a business. Below are some of the different types of fields and how they should be completed.

The following fields will be filled in with text input.

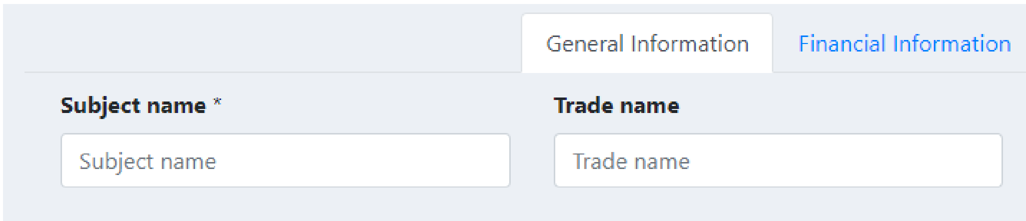


Figure 10. Text Field

The following fields are filled in by checking on the small squares and allowing the selection of one or more options.

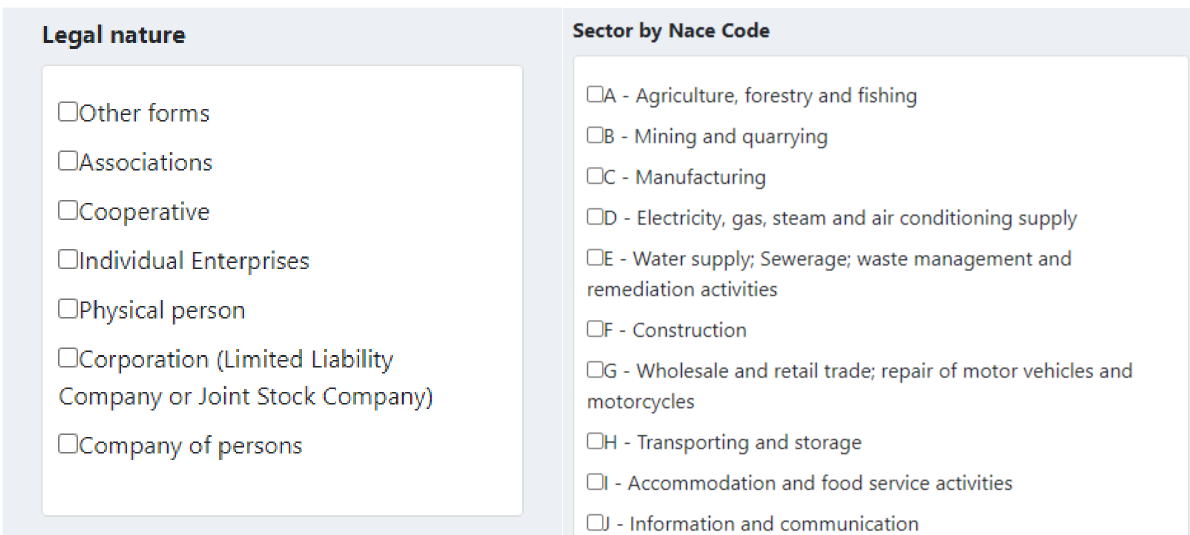


Figure 11. Field with many choices

Clicking on the date fields opens a calendar where the date is selected.

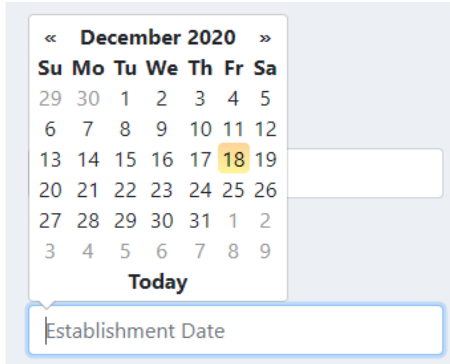


Figure 12. Date Field

The following field allows you to select only one of the options listed in it.

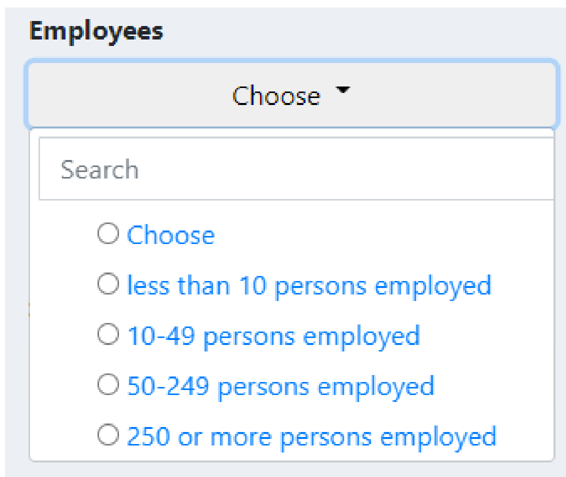


Figure 13. Checkbox

If you want to upload documents, by clicking the *"Upload"* button the *"Upload Document"* window opens where you can upload documents from your computer.

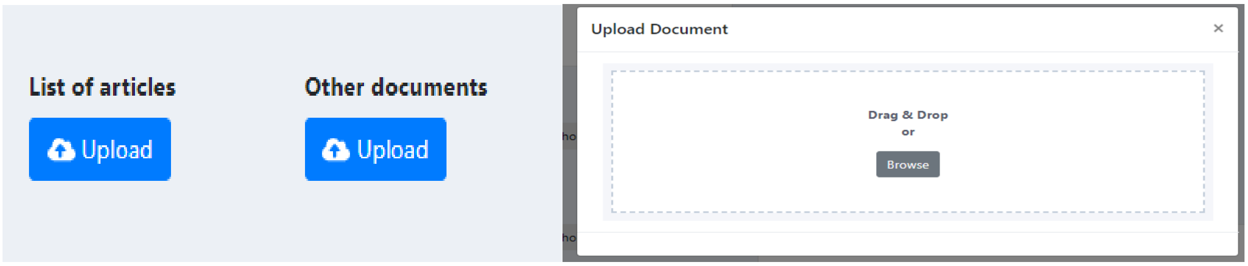


Figure 14. Upload documents field

The General Information section also contains fields that display or not depending on what you select.

If you choose the Albania option in the "State" field, the Cities of Albania will appear for which you can register a business (in our case only Tirana. After you check the city Tirana, all the districts will be displayed and you will have the opportunity to choose one or more of them.

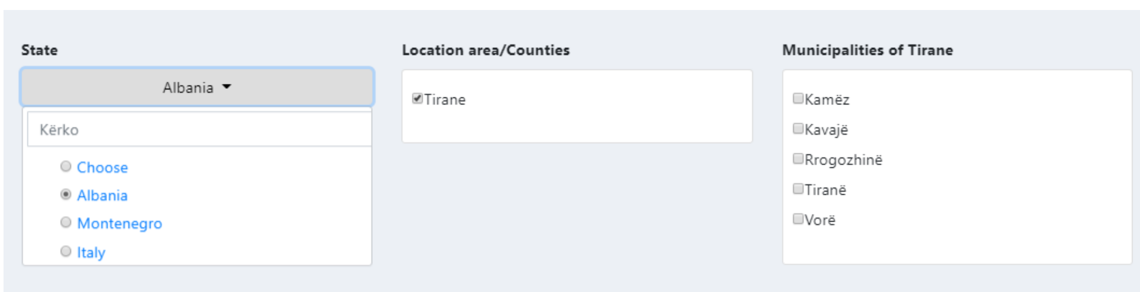


Figure 15. The related options after we check the state of Albania

If the Montenegro option is selected, the entire city of Montenegro will be displayed and you will be able to select the relevant options.

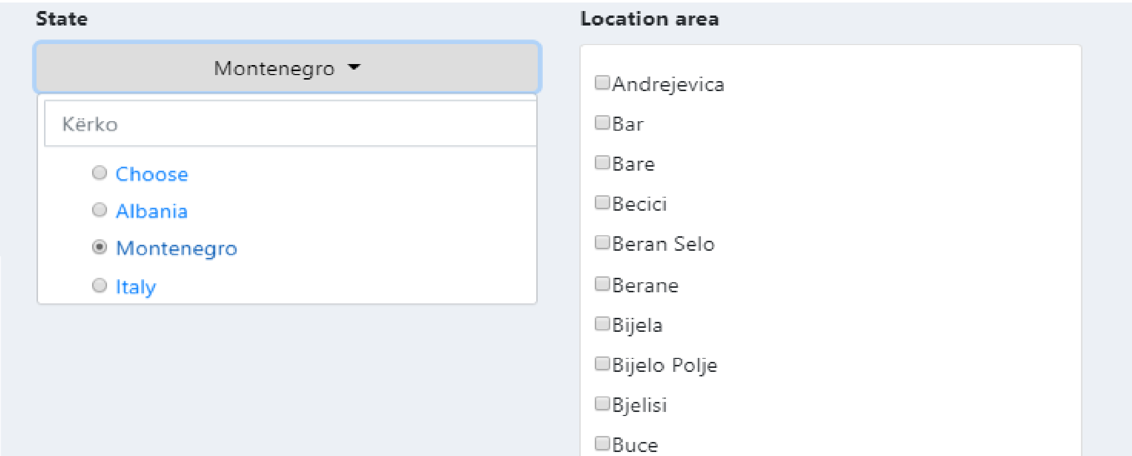


Figure 16. The related options after we check the state of Montenegro

If the Italy option is selected, the Regions of Italy will be displayed (in our case only Puglia) in which the business can be registered and then the provinces of Puglia.

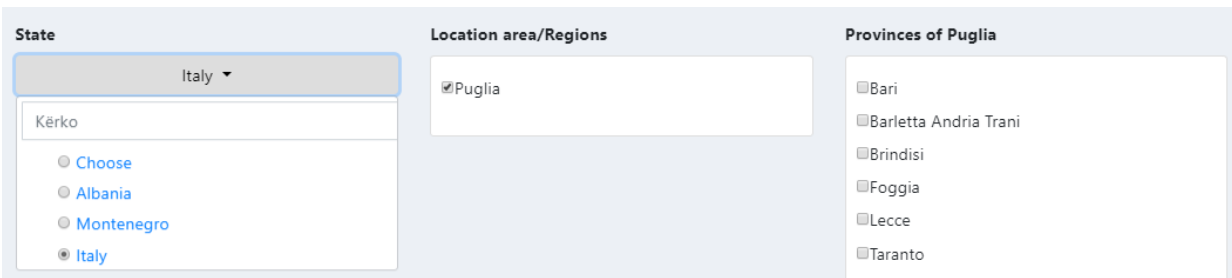


Figure 17. The related options after we check the state of Italy

Also, the "Sector by Nace Code" field displays different fields depending on the choices (of checked options).

If the “A-Agriculture, forestry and fishing” sector is selected, the A subsectors will be displayed. If the “B-Mining and quarrying” sector is selected, the B subsectors will be displayed and so on for all the listed sectors.

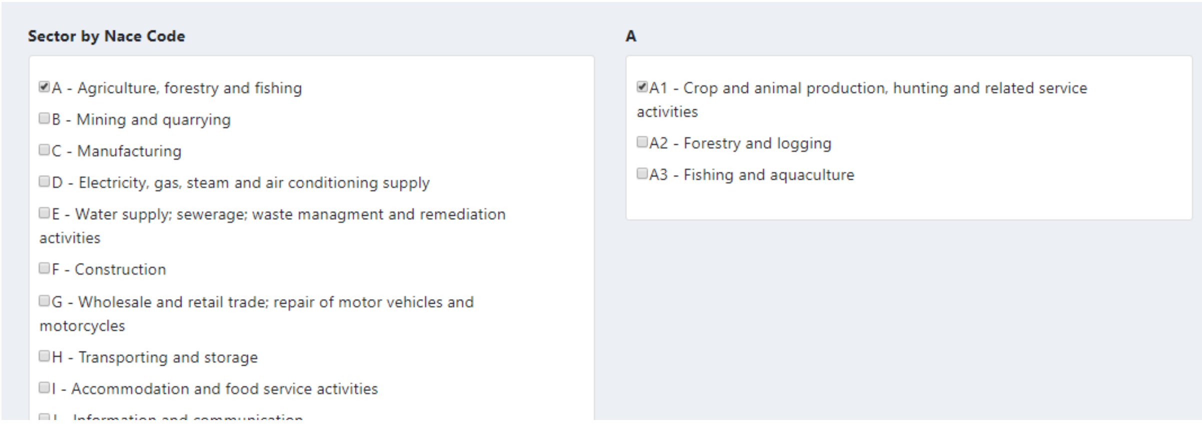


Figure 18. Sectors

3.1.2. Financial Information

In the Financial Information section, you will see the fields that contains information on the Capital and Turnover business.

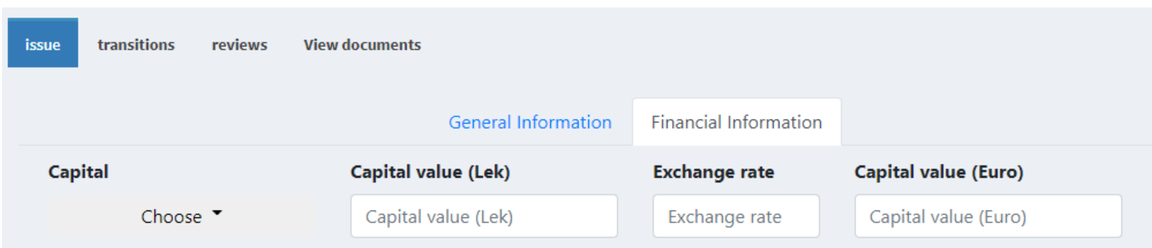


Figure 19. Financial Information

In case the choice of the country in the General Information section will be Albania, then the *Financial Information* section will display the fields which allow the conversion of lek currency into euro. Just enter in the Capital/Turnover fields their value in lek and exchange rate and you will see the corresponding values in euros.

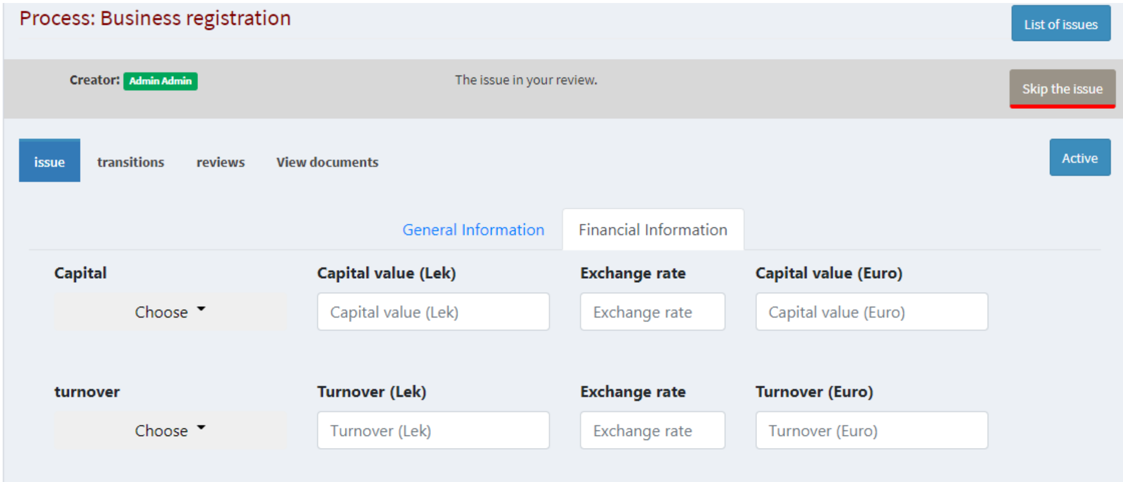


Figure 20. Financial Information #2

If a field contains the * character, then this field is required to fill in. If you let this field blank, it will display an error message.

In the end, press the Submit button to save the uploaded data in both sections. If the data is entered correctly, the following message will be displayed. If not, an error message will be displayed and you should check for the accuracy of filling in the fields.

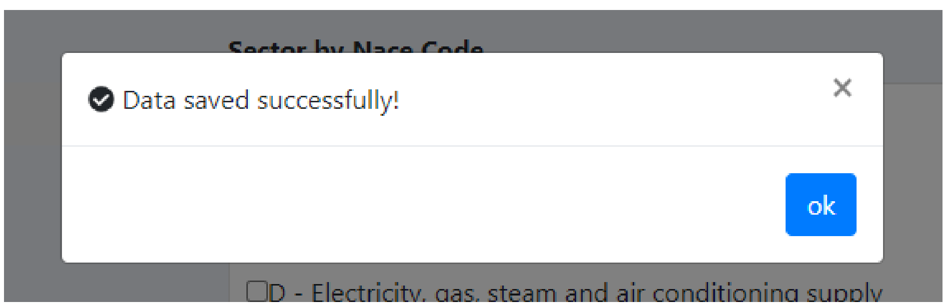


Figure 21. Successfully data store

To return to the items list Press on the button with the same name.

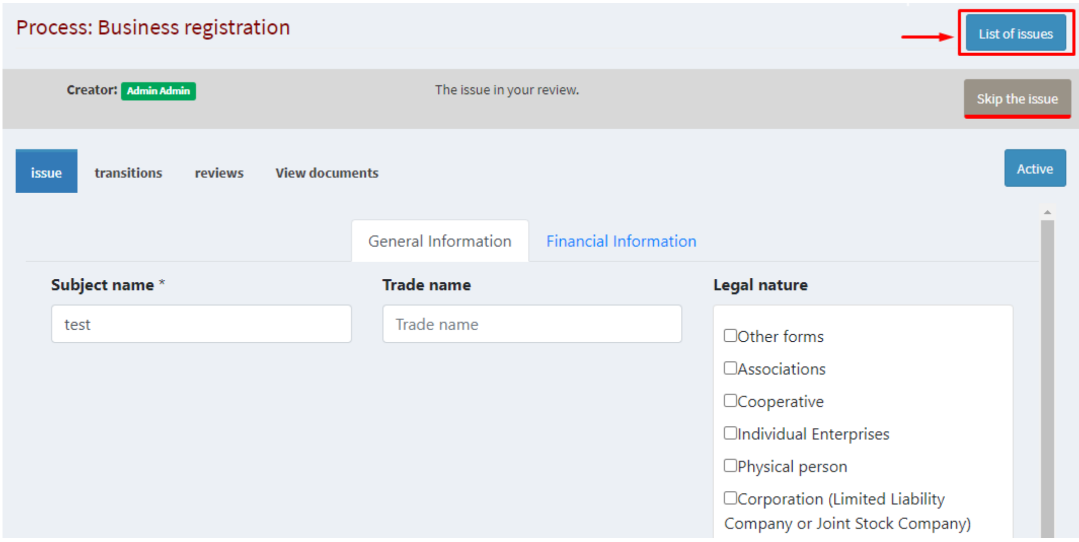


Figure 22. Issues List

If you click *"Look"* you will be able to see the details of a pre-filled issue in the system and you can make modifications if necessary.

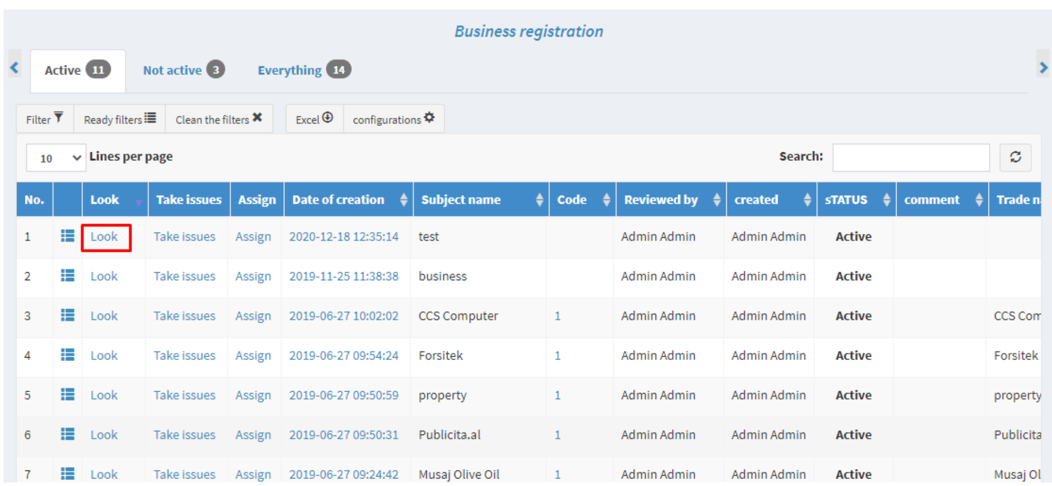


Figure 23. Look/Modify issue

To change the status of the business, click on the "Active" status in which the business is currently located.

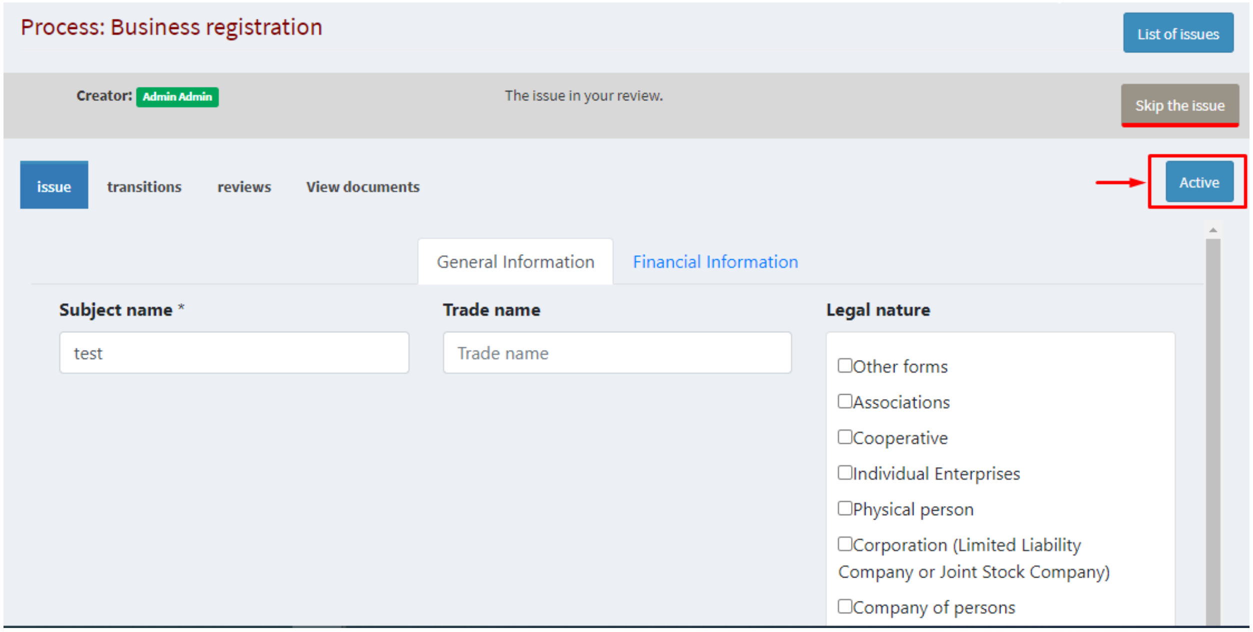


Figure 24. Change issue status

A window will open, click "Not active" and the business will be switched to inactive.

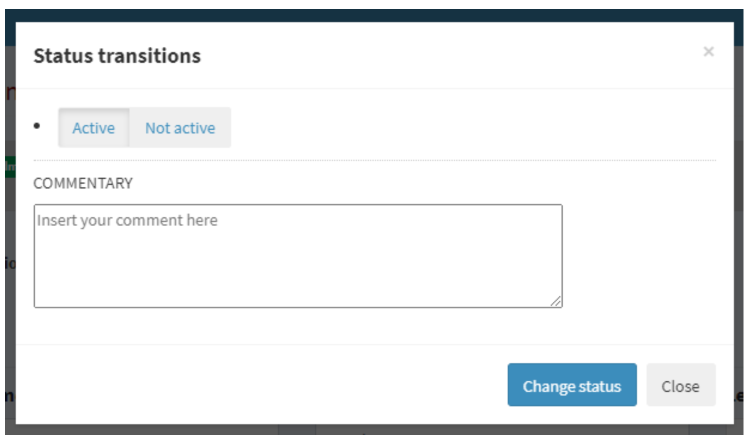


Figure 25. Status transitions

4. Groups

Users are part of workgroups, depending on the operation and process assigned in the system.

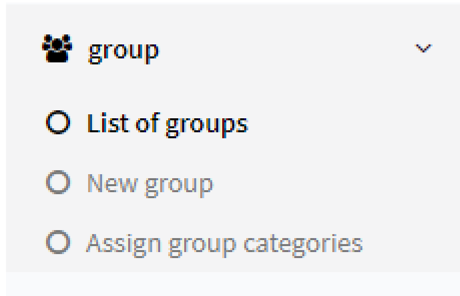
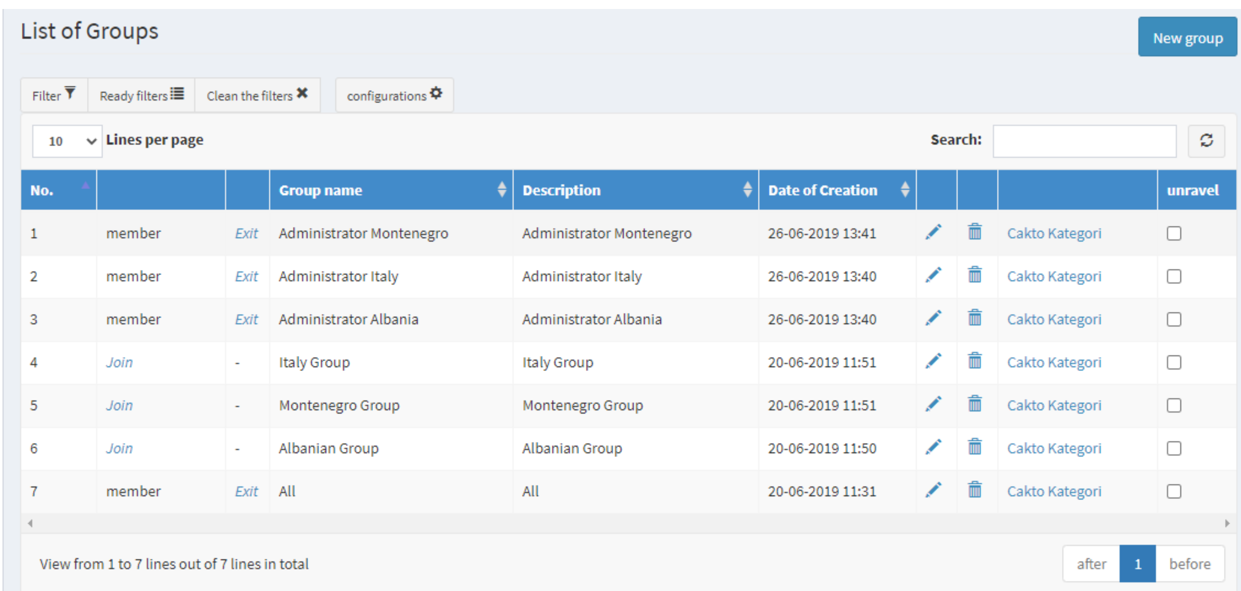


Figure 26. Group

The group represents a community of users who have the same functionality in the system. A group of users is assigned the role of a process in the system; thus, all members of this group will have equal rights regarding the process where they are assigned. So, groups organize users according to the work they do and the rights they enjoy.

4.1 Group List

In the subcategory group list, you will be able to see the list of all existing groups which appears in the figure below



No.			Group name	Description	Date of Creation				unravel
1	member	Exit	Administrator Montenegro	Administrator Montenegro	26-06-2019 13:41			Cakto Kategori	
2	member	Exit	Administrator Italy	Administrator Italy	26-06-2019 13:40			Cakto Kategori	
3	member	Exit	Administrator Albania	Administrator Albania	26-06-2019 13:40			Cakto Kategori	
4	Join	-	Italy Group	Italy Group	20-06-2019 11:51			Cakto Kategori	
5	Join	-	Montenegro Group	Montenegro Group	20-06-2019 11:51			Cakto Kategori	
6	Join	-	Albanian Group	Albanian Group	20-06-2019 11:50			Cakto Kategori	
7	member	Exit	All	All	20-06-2019 11:31			Cakto Kategori	

Figure 27. Group List

The existing groups display two main functionalities: *"Join"* and *"Exit".*

If you press on *"Join"* button, you will send a request to become a member of this working group. Someone with the right privileges can confirm or reject your request, specifically the system administrator.

If you are a member of the group and you want to leave, press the "Exit" button to send the request to leave the group. You will leave the working group as soon as your request to leave the group is accepted.

After you get the notification if you really want to join this group press "Confirm", otherwise "Delete".

4.2 New Group

The add-on and modification interfaces are the same. Below we present the modification interface, where the fields are filled with the actual data. If you want to change any of them click *"Save"* to save your changes. If you select *"All"*, at the *"Members"*, then for this working group you will assign all active users of the system as members.

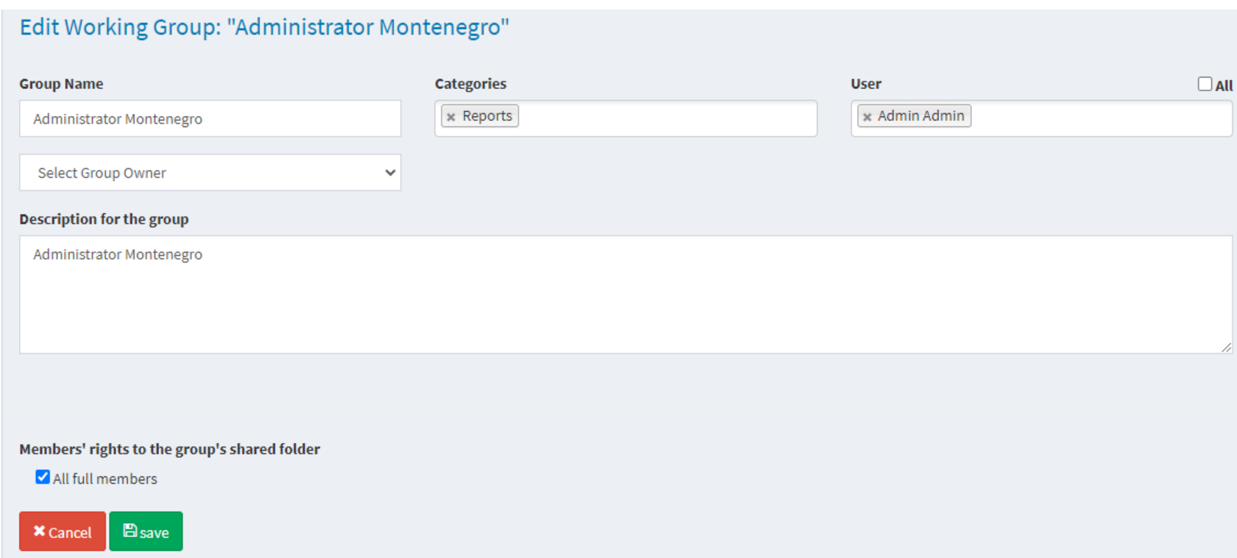


Figure 28. Edit group

5. Configurations

In the main menu, you have configurations that will help you make configurations that suit you, starting from the users, the roles in the system, the rights for each role, the creation of a new role, of a new user.

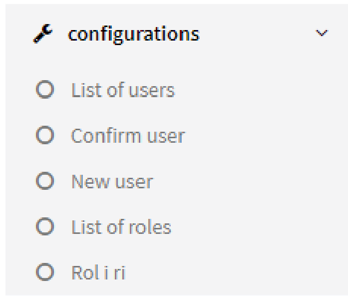
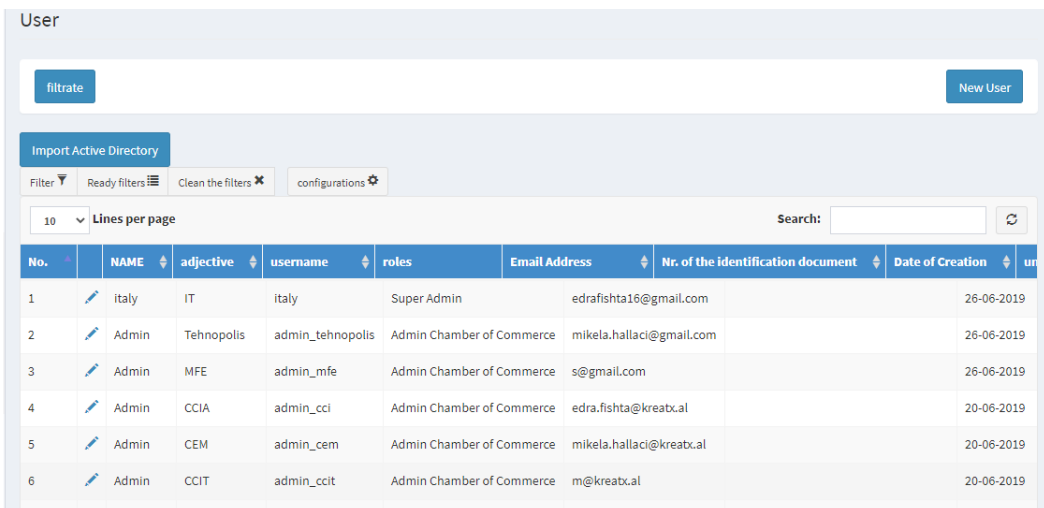


Figure 29. Configurations

5.1 Users List

If you click on *"List of Users"* button, then the list of all system users with the basic data of each will open, as follows:



No.		NAME	adjective	username	roles	Email Address	Nr. of the identification document	Date of Creation
1		italy	IT	italy	Super Admin	edrafishta16@gmail.com		26-06-2019
2		Admin	Tehnopolis	admin_tehnopolis	Admin Chamber of Commerce	mikela.hallaci@gmail.com		26-06-2019
3		Admin	MFE	admin_mfe	Admin Chamber of Commerce	s@gmail.com		26-06-2019
4		Admin	CCIA	admin_cci	Admin Chamber of Commerce	edra.fishta@kreatx.al		20-06-2019
5		Admin	CEM	admin_cem	Admin Chamber of Commerce	mikela.hallaci@kreatx.al		20-06-2019
6		Admin	CCIT	admin_ccit	Admin Chamber of Commerce	m@kreatx.al		20-06-2019

Figure 30. User List

To create a new user, just click on the "New User" button, and it will display the interface for saving data for this user, which will be explained below. The user list interface also offers various functionalities such as editing a user's data, deleting one or more users who do not have access to the system, and filtering the user list by name, role, email, or login number.

A column with the inscription "Reset Password" also appears on this page. This option is used by the system administrator if the user's account is blocked. By clicking on this option, the administrator sends an email to the user with a new password. The password is automatic and the user can set a new password in his profile.

Gjithashtu sistemi ofron edhe funksionalitetin "*Zhblloko përdorues*" i cili shfaqet në kolonën "Zhblloko" në raste kur një përdorues bllokohet nga sistemi. Bllokimi i një përdoruesi nga sistemi mund të vijë si pasojë e aksesimit të shpeshtë të sistemit me kredenciale të gabuara, fshirjes së të dhënave të shumta nga sistemi në një kohë të shkurtër kohore, etj. Zhbllokimi i një përdoruesi kryhet nga një rol me të drejta të plota mbi sistemin, nëse ju bllokoheni nga sistemi kontaktoni me personin që ka rolin "Admin".

The system also provides the "Unlock uses" functionality in the "Unlock" column in case it is used when blocked by the system. Blocking a user from the system can come as a result of many attempts of incorrect credentials, deleting system data of a system in a short period of time, etc. Unlocking a user is performed by a role by running a full-on system if you block from the system the contact with the person having the role "Admin".

5.2 User Confirm

In the main menu if you click on "Settings" / "Confirm user" the following interface will be shown:

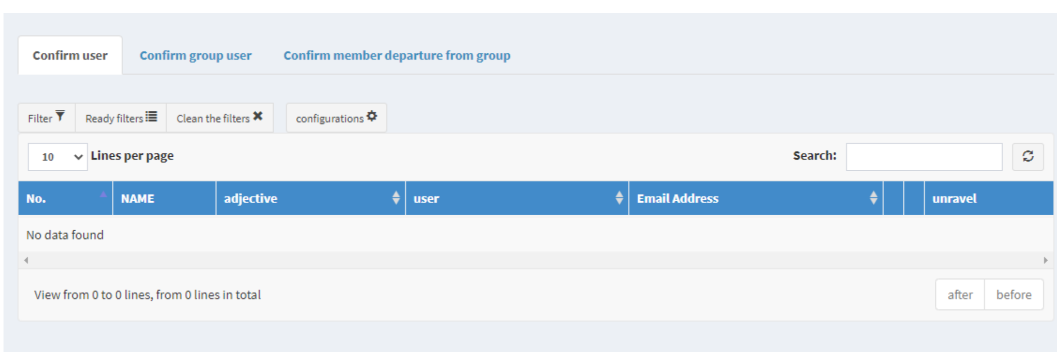


Figure 31.Confirm User

In the "Confirm user" interface, you will find the entire list of users who will be registered in the system and still do not have the right to log in without being confirmed. Click the "*Confirm*" button to confirm this new user.

If you do not want a user to be active on the system, click "*Delete*" and this user will be removed from the list of unconfirmed users.

5.2.1 Confirm Group Users

In the same interface, you have the table "Confirm group user". Below is the list of members waiting to be confirmed in groups.

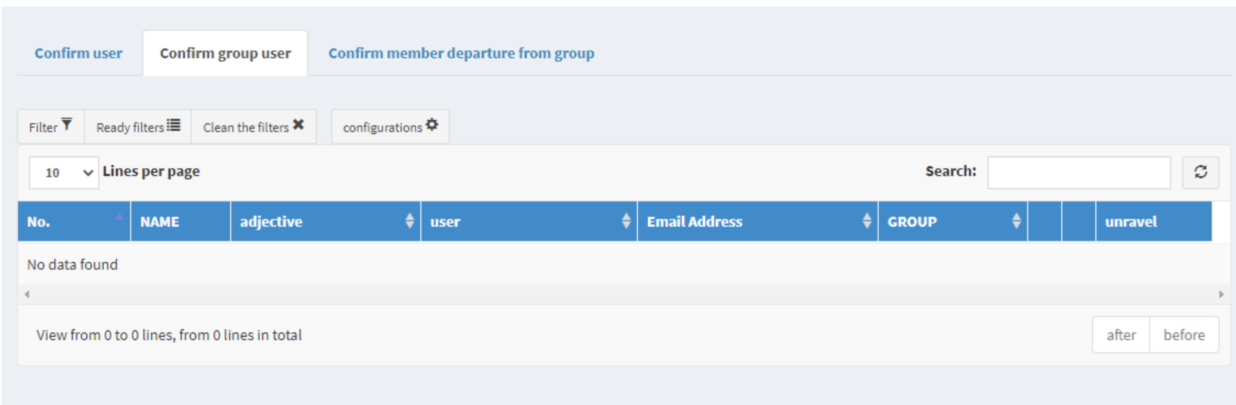


Figure 32. Confirm group user

If you do not want this member to be part of this group, click the "Delete" button. If you click "Confirm" a new window will open to determine the rights that this member will have in this group.

5.2.2 Confirm member departure from group

This interface will display all member requests that have been made to leave current workgroups. If you want to confirm the user leaving a certain group, just click on "*Confirm*". If you do not want this member to leave this group, click the "*Delete*" button.

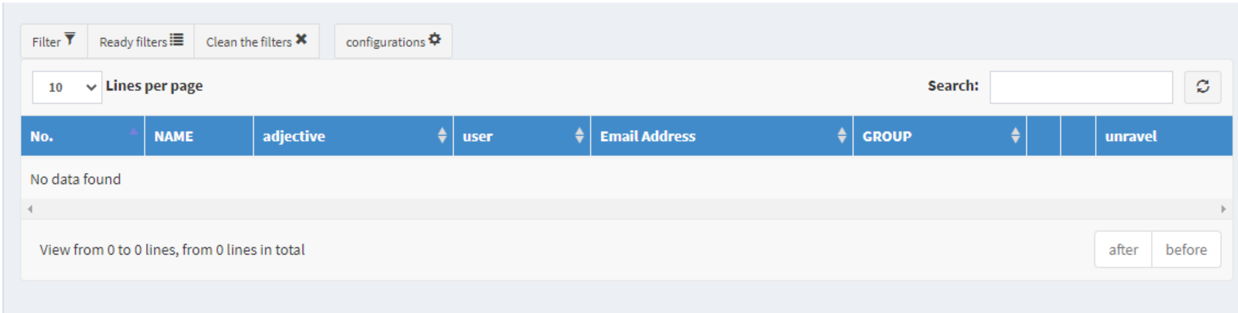


Figure 33. Confirm member departure from group

5.3 New user

If you want to add a new user, click on the "New User" button and will open the interface where you can enter the data of this user and specify the role you want to give, i.e., the rights that this user will have on the actions he can perform on the system. The user will be automatically added if you click the "Save" button and the interface will go directly to the list of existing users or we can click "Save and new", and the interface will open the interface to create a new user.

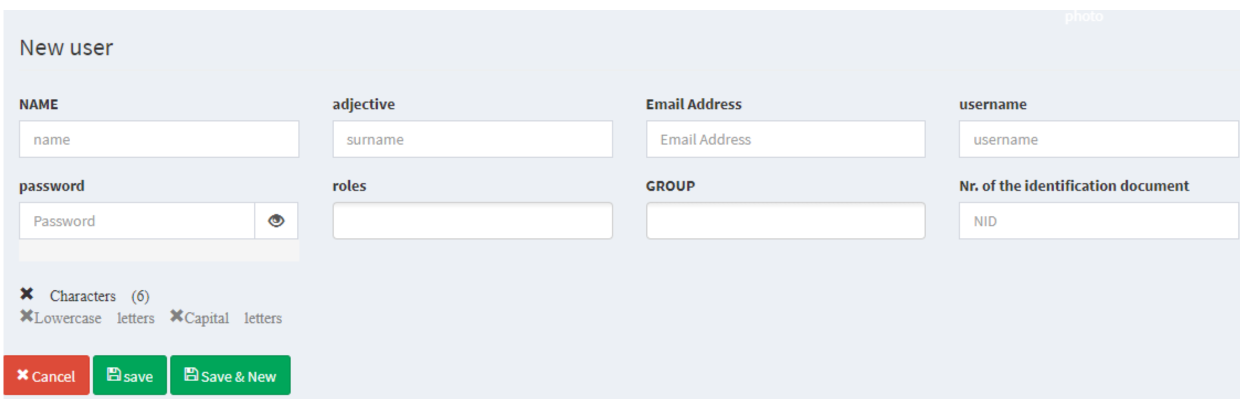


Figure 34. New user

5.4 List of roles

To see the list of existing roles, just click on "*List of roles*" and you will see the following interface:

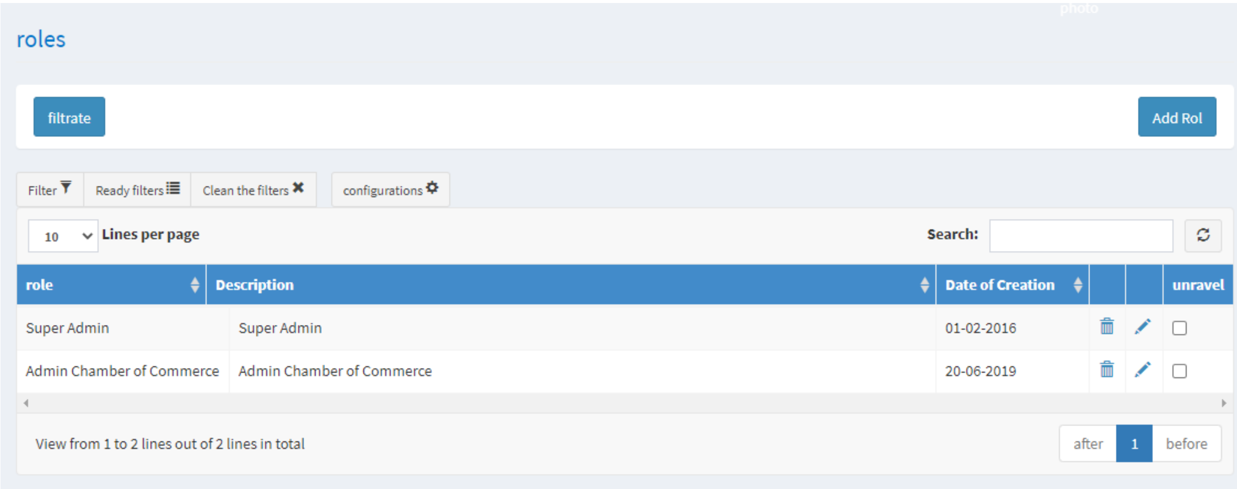


Figure 35. List of roles

In this interface, you will be able to see the defined roles, in terms of rights that can be assigned to each user, such as, admin, who has full rights over any action that can be performed with the system. Even after the role has been configured, the name, description, or even the rights assigned to it can be changed again.

If you want to delete a certain role, just click on the button on the right side of the respective role. Advanced role filters are also provided for the list of roles where it can be filtered by name, description and creation date.

The system administrator is the only one who has full rights over the system and enjoys certain privileges such as:

- Accesses all possible system options
- Creates each type of user, opens an account for each user

- Manages users and defines roles in various projects

- The administrator has the right to configure the page of each end-user where the end-user will upload or write his problem

- Generates reports regarding case training activity, engaged users, predefined deadlines, and problem-solving progress phases

- Generates logs that keep track of every possible action in the system

5.5 New role

To add a new role, click on "New Role" or click "Add Role" in the list of existing roles, and the interface will appear where you can write the name of the role you want to create and a short description, as well as you can determine the rights that this role will have, by clicking (select) on the relevant right.

The rights are divided into four modules: Basic Module, Help Desk Module, Digital Archive Module, MIS Module, and Chat Module. Once a new role is created, depending on the function the user will have, this role in the company may be assigned rights to add, edit, delete users, comments, roles, may be assigned rights to create issues, uploading documents, assigning issues to another user.

In creating a new role, for ease of use, there is an option that automatically selects / check-on all role rights, in each of the respective modules.

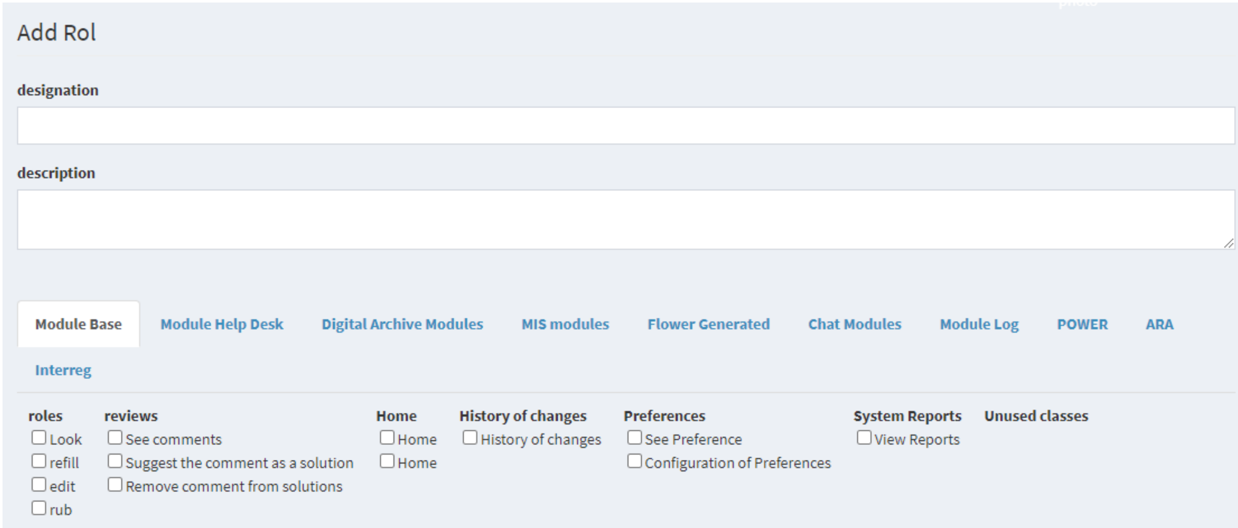


Figure 36. Base module

In the basic module can be checked and assigned certain right roles to add, change, delete roles, comments. You can check the right to display the main interface for that role, you can see the history of changes for a certain issue as well as the reports.

Figure 37. Help desk module

In the "users" section under the help-desk module, the section is all possible rights that can assign a role to act as adding new users, changing and deleting their existing ones, as well as the possible action of the capital using a profile like changing the password or editing the data.

In the "issues" section are all the rights related to the creation of new issues, their modification, the definition of the right that can have a role to see details of issues that have not been created and are not under its review.

The "group" section includes all rights to form a new group, the right to have a role in viewing existing groups, to apply for membership, to apply to leave the group.

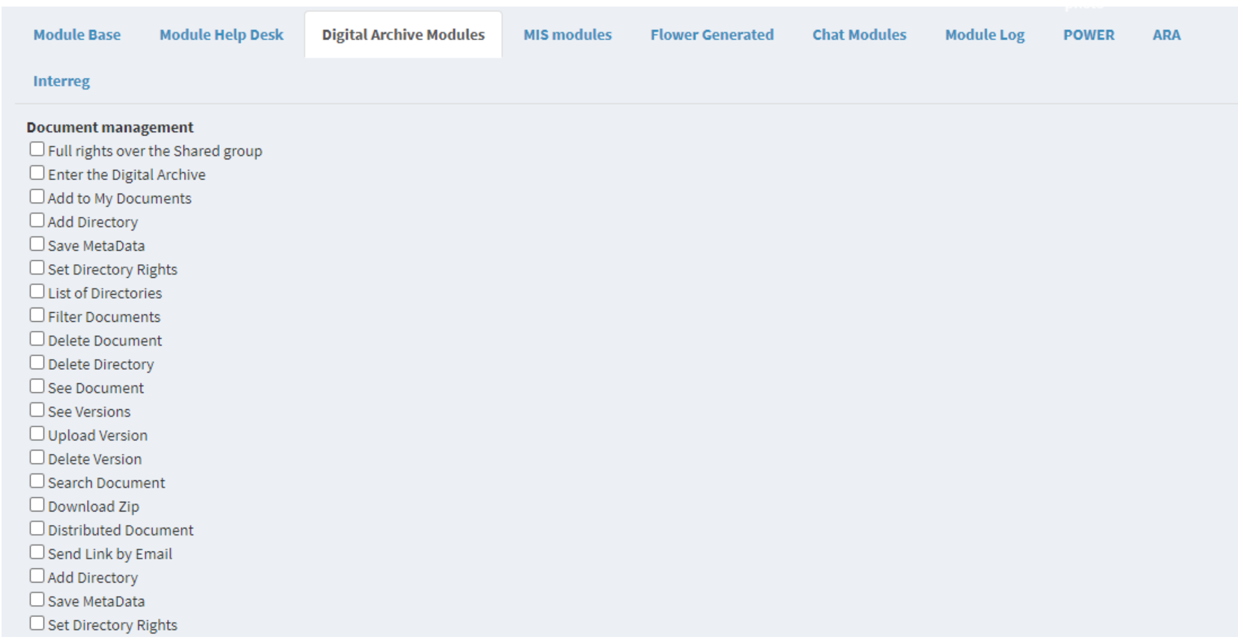


Figure 38. Digital Archive Module

This section includes the rights related to uploading documents, deleting them, assigning directories, rights that may have a role to upload documents.

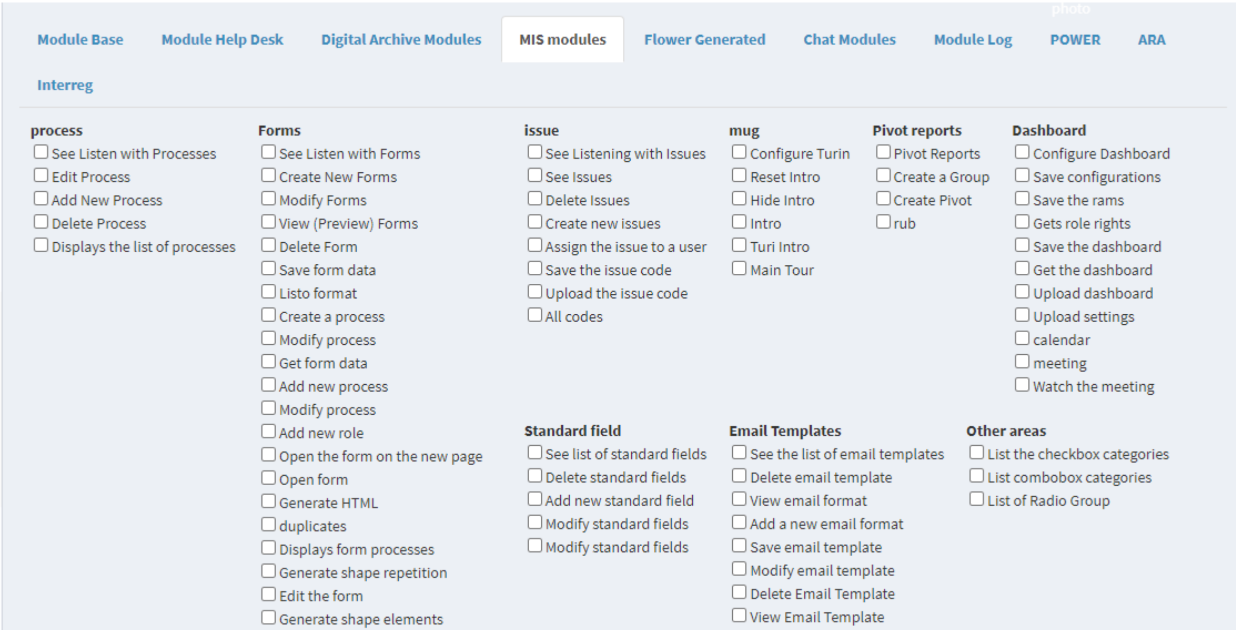


Figure 39. MIS Module

To save your changes and then go to the role interface click the "Save" button. If you want to add another new role after the role you are adding click "Save & new".

6. Pivot Reports

Pivot reports provide the ability to create summary tables and graphs related to issues created, dynamically. To create a pivot report, click on Pivot Reports and the following interface will appear

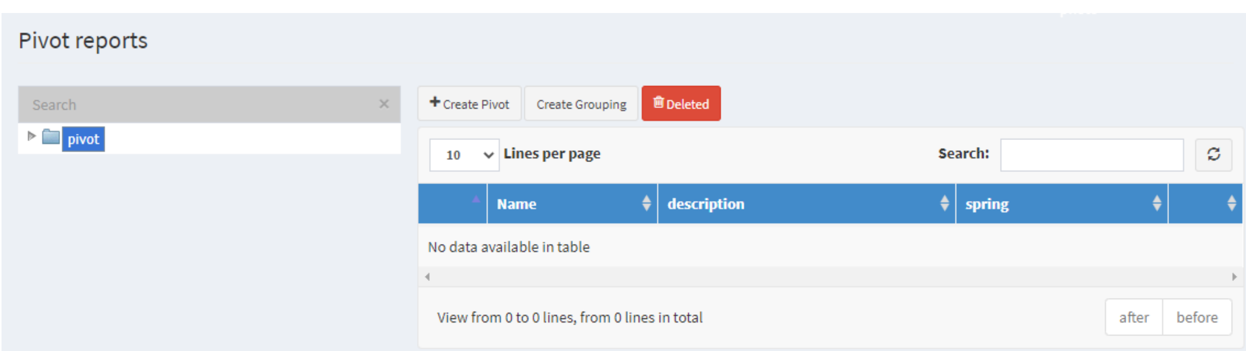


Figure 40. Pivot Reports

You can build pivot graphs from two data sources:

- Basic, or simple. If this type of report is selected, it will display basic data about the issue created without including details about the status or creator of the issue, etc.
- Detailed, or detailed. It offers you the opportunity to use in the report of each field of information stored for a ticket, such as general data and those for the date of creation of the ticket, the status. This to build reports and graphics with an even greater level of detail

First, you need to click on the *"+ Create Pivot*" button, choose between the "*Basic*" or "*Detailed*" type of report, and then you will be directed to the pivot construction interface. From the same interface, you are currently in, you are given the ability to create or delete report clusters. Basically, a grouping is a category that will contain pivot ratios of a certain type within it. In the following sections, this concept will be explained in detail.

To create a new grouping, you need to click on the "Create Grouping" button, and then fill in the grouping information like a parent (the parent grouping to be included if we want to include it within an existing grouping), the relevant name, and description for the grouping. Then click the "Save" button to save the new grouping.

Clicking on the name of a grouping will show you in the table to the right the types of pivot reports stored in that grouping, or no data otherwise.

Just click on the "Select>" button next to the record in the table, to be redirected to the pivot construction interface, which will be explained in detail below.

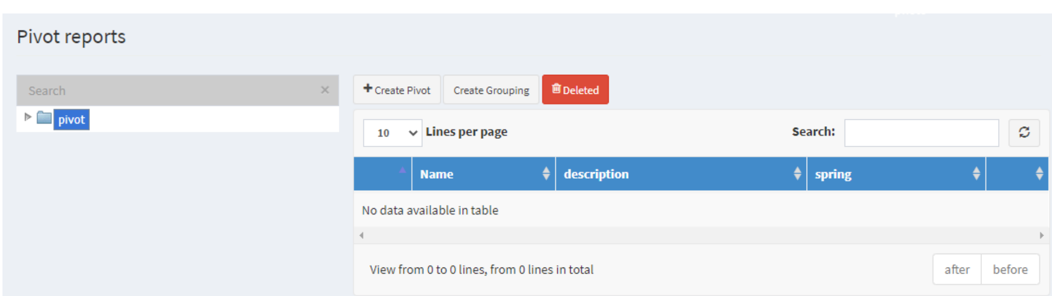
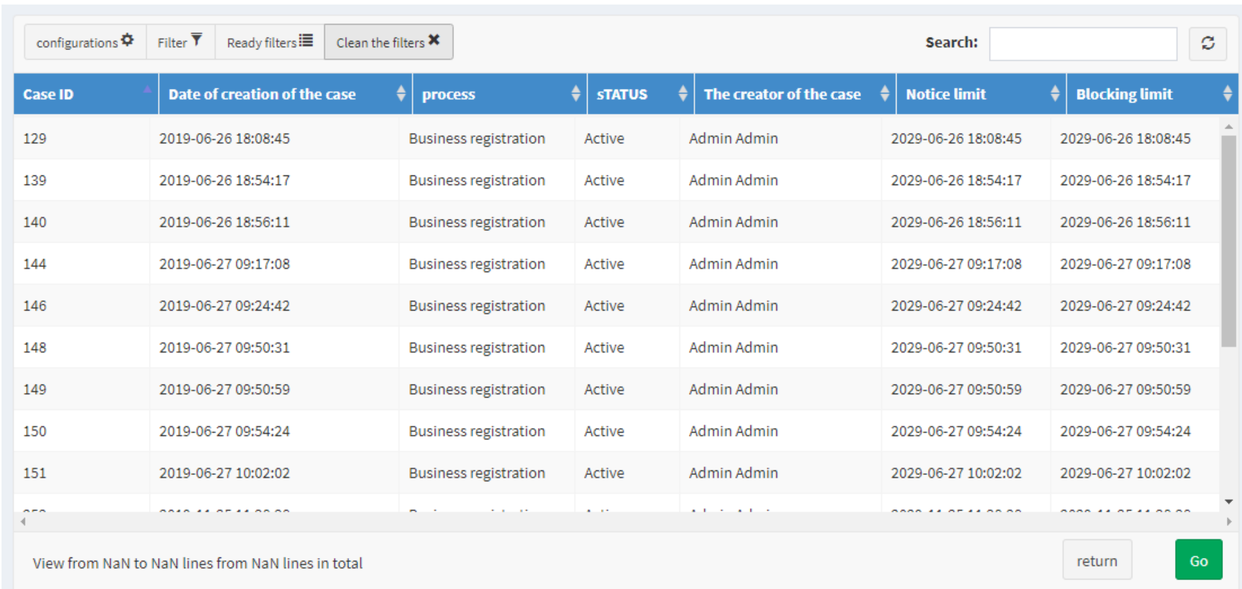


Figure 41. Pivot Reports

This way you can delete a group by selecting the desired group in the hierarchical structure on the left and then clicking the "Delete" button.

6.1 Determining report data

Once selected between the type "*Basic*" or "*Detailed*" as explained above, or after selecting a ready-made pivot, the procedure for building the report is the same, so the following will be considered in the case of selecting the type " *Basic* ".



configurations Filter Ready filters Clean the filters Search:

Case ID	Date of creation of the case	process	sTATUS	The creator of the case	Notice limit	Blocking limit
129	2019-06-26 18:08:45	Business registration	Active	Admin Admin	2029-06-26 18:08:45	2029-06-26 18:08:45
139	2019-06-26 18:54:17	Business registration	Active	Admin Admin	2029-06-26 18:54:17	2029-06-26 18:54:17
140	2019-06-26 18:56:11	Business registration	Active	Admin Admin	2029-06-26 18:56:11	2029-06-26 18:56:11
144	2019-06-27 09:17:08	Business registration	Active	Admin Admin	2029-06-27 09:17:08	2029-06-27 09:17:08
146	2019-06-27 09:24:42	Business registration	Active	Admin Admin	2029-06-27 09:24:42	2029-06-27 09:24:42
148	2019-06-27 09:50:31	Business registration	Active	Admin Admin	2029-06-27 09:50:31	2029-06-27 09:50:31
149	2019-06-27 09:50:59	Business registration	Active	Admin Admin	2029-06-27 09:50:59	2029-06-27 09:50:59
150	2019-06-27 09:54:24	Business registration	Active	Admin Admin	2029-06-27 09:54:24	2029-06-27 09:54:24
151	2019-06-27 10:02:02	Business registration	Active	Admin Admin	2029-06-27 10:02:02	2029-06-27 10:02:02

View from NaN to NaN lines from NaN lines in total
return Go

Figure 42. List of issues created

To go to the pivot construction interface, you need to click on the "Continue" button. But before that, you can further filter the information you could include in the pivot reports. This can be done in two ways:

- By clicking on "*Settings*" at the top of the table, you can define the columns of the table. Consequently, as an element to be used as columns, rows, or cells in the pivot, only the columns defined by you will be.
- By clicking on "Filter", specify the desired filters and then click "Filter" on the new interface, you define by default the currently filtered column as the row of the table to be generated by the pivot. However, you can remove that row from the pivot, and set another one if you wish.

If you want to use all the information in the table, click directly on the "Continue" button.

6.2 Building a Pivot Report

To build a pivot ratio it is necessary to select at least two of the fields illustrated below:

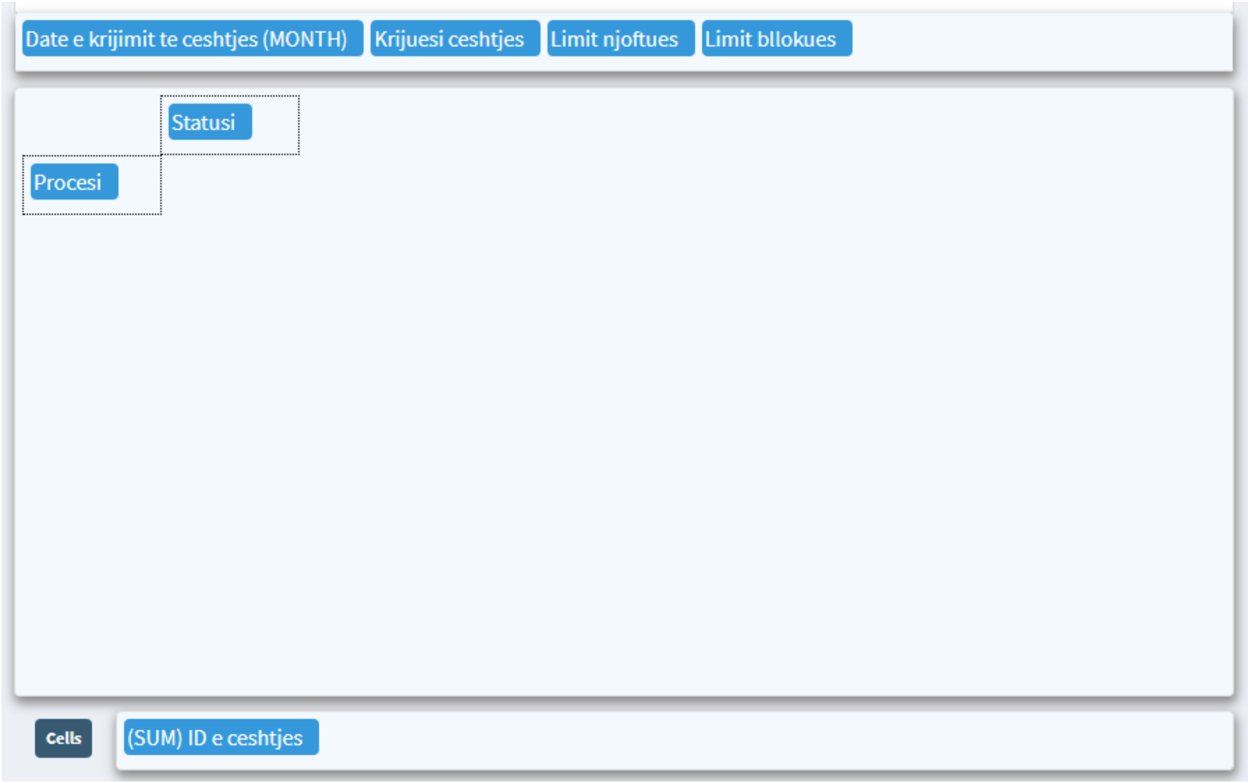


Figure 43. Data to be included in the pivot

Mandatory data to be specified are cells and rows, while columns are optional:

Row (s) - are determined by the elements you place in the space on the left. As can be seen in the figure above, the value "Process" is selected, and the rows of the table include exactly all the processes of the system

Column / t - is determined by the element that is placed in the upper space of the interface for the construction of the pivot. In the current case, the selected element is "Status", so the information in the columns includes the status through which the issue passes.

Cell - is defined by the element placed in the field labeled "Cell", and determines exactly what information will be displayed for "*Value / ALL*".

Click Apply pivot and the following interface will be displayed:

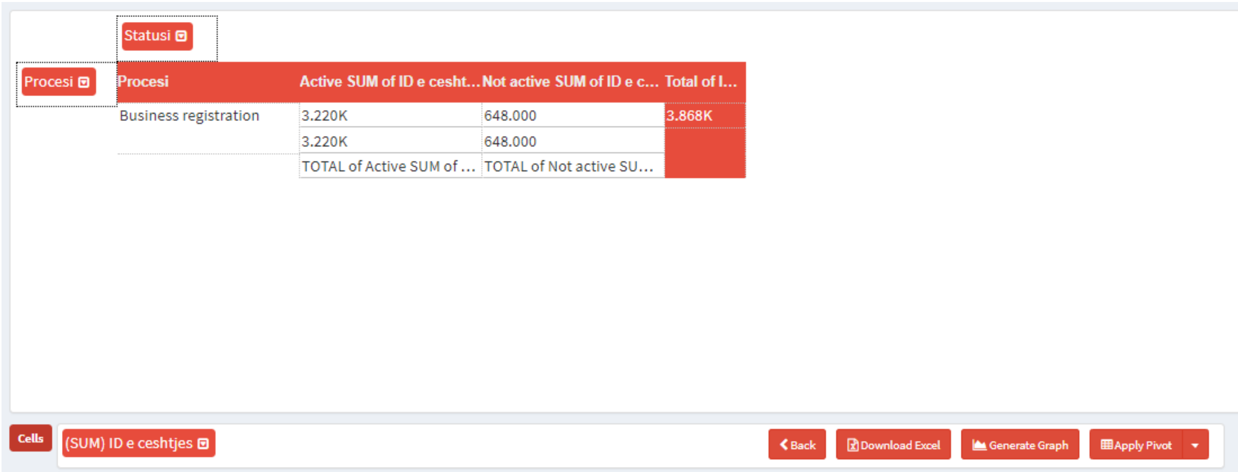


Figure 44. Generating a pivot report

In conclusion, we can say that the table above will post information about the total number of issues of established processes categorized according to their status.

*Attention: for each element, column, row, or cell, you can specify some additional configurations. Usually, this is done more for the cells, to determine how the information is displayed in the table or graph.

First, click on the triangle icon next to the selected element. You will see the following interface:

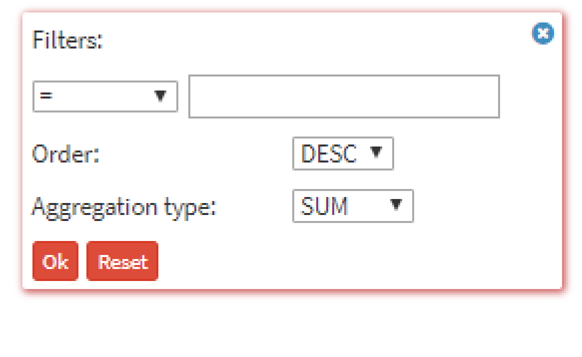


Figure 45. Customize features for an element

The actions you can perform are:

- Filter the information to be displayed in the table by selecting values of {=, <>, <,>} and filling in the field next to it.
- Sort information in ascending order (ASC) or descending order (DESC).
- Information aggregation, to determine whether the information in cells will be displayed as a sum (SUM) or total value count (COUNT).

Veprimet që mund të kryheni janë:

To save the new configurations you have to click on the "*OK*" button each time. To clear a configuration and restore it to the default state, click on "*Reset*". At the end of all the above data configuration procedures that will be displayed in the table, click the "*Apply Pivot*" button, to display in the interface tables with the desired values.

Attention*: The last row of tables generated as pivots will always contain the total values (sum) according to the columns of the table.

** Another important element to consider when displaying data is when you use as a row an element of type "Date" (System Date, Document Date, etc.). In the adaptation of the features mentioned a little above, in case the selected element is of type "Date" a new configuration appears. This configuration allows you to specify how the data is organized. If you click on the triangle icon on the side of the element, you will see the following interface:

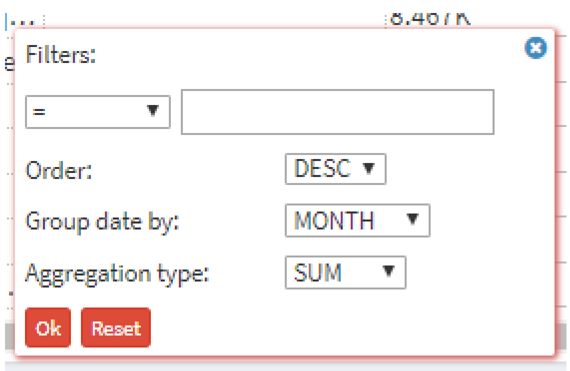


Figure 46. Display of Date type data

In this special case, the information can be filtered by selecting between the values {=, <>, <,>} and the information in ascending or descending order is also offered a Group date by option through which we can group the data according to:

- DATE- the display of data in the table will be according to the format day/month/year.
- WEEK- data display will be in week/year number format.
- MONTH- data display will be according to the month/year format.
- QUARTER- data display will be as a quarterly / year number.
- YEAR- data display will be for the year only.

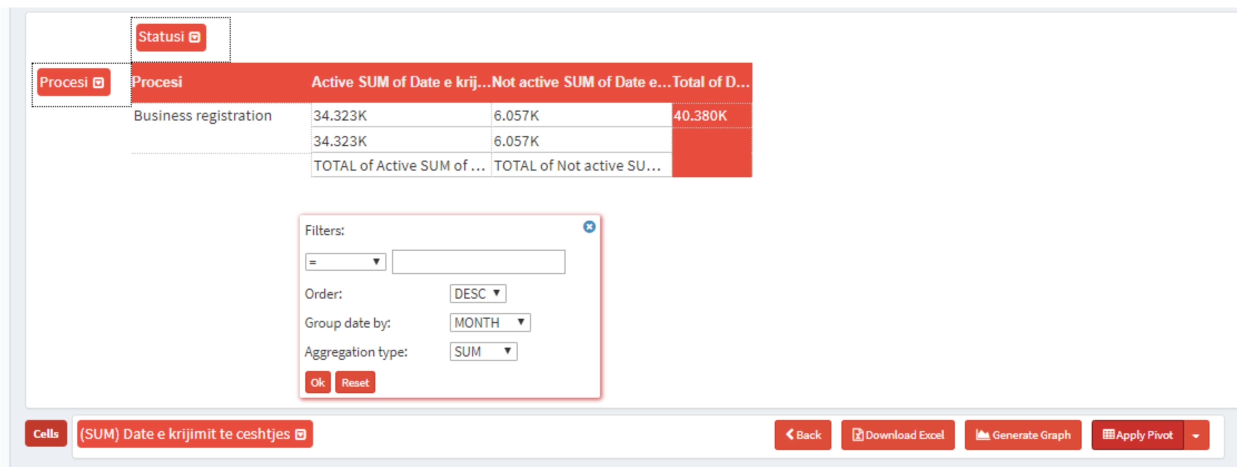
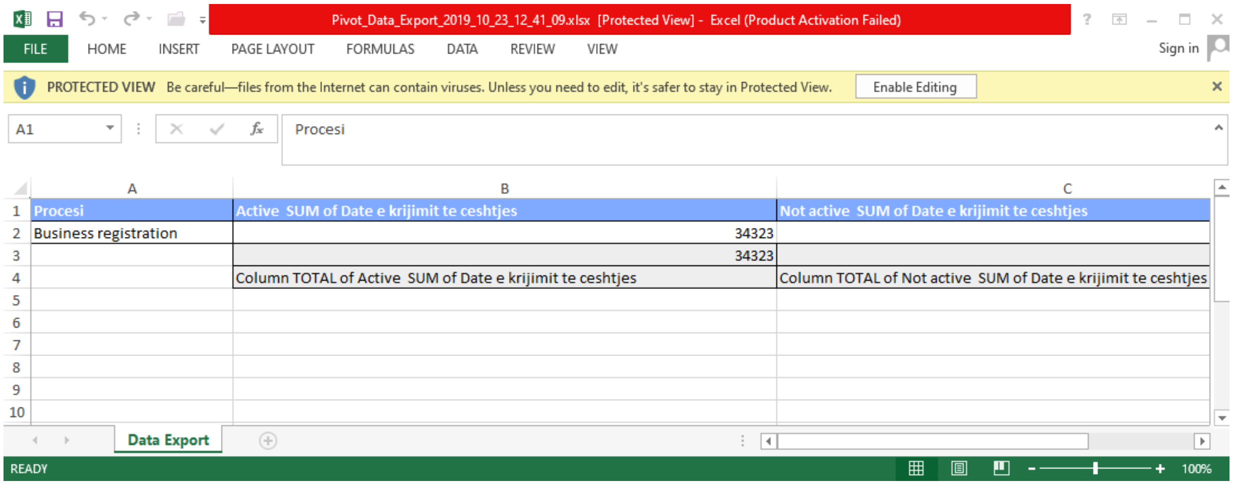


Figure 47. Organizing data by week

For the generated table, the Download Excel option is offered, through which we can download the above table in an excel format. The moment you click on the option a message is displayed that the Table was successfully downloaded.



	A	B	C
1	Procesi	Active SUM of Date e krijimit te ceshtjes	Not active SUM of Date e krijimit te ceshtjes
2	Business registration	34323	
3		34323	
4		Column TOTAL of Active SUM of Date e krijimit te ceshtjes	Column TOTAL of Not active SUM of Date e krijimit te ceshtjes

Figure 48. Excel Table

Generate graphs

You can also display the information displayed in tabular form by pivot in the form of graphs of different types through the Generate Graph option provided by the system. First it should be said that the information in the graph is organized according to the values that you set as rows of the table, while for the elements that are columns of the table, the graph shows their total amount for each row.

For example, for the case taken above, if we generate a graph of the type "*Pie*" it will be as follows:

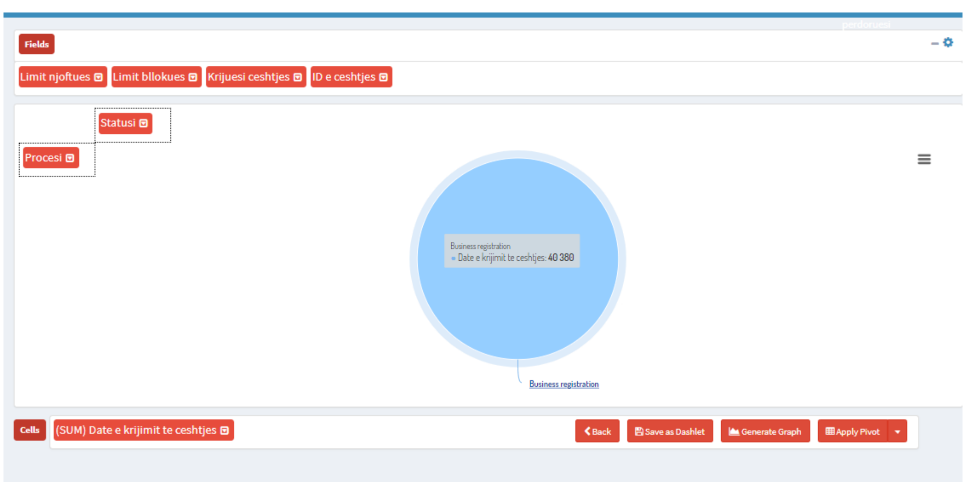


Figure 49. Pie graph generated by the pivot ratio

To generate such a graph, several different visual representations of graphs are offered:

- With columns
- With line
- Pie
- Heat map, which needs significant data to be understandable on display. With mesh
- Map, to generate this ratio the element "Circle" must be placed first in the order as a row of the table.
- Sankey, this graph needs at least two lines to build.

Saving as dashlet

Once you have generated a graphic, the "Save as Dash" button will appear at the bottom of the interface. Clicking on this will display an interface that will allow you to customize and save a graph like a dash.

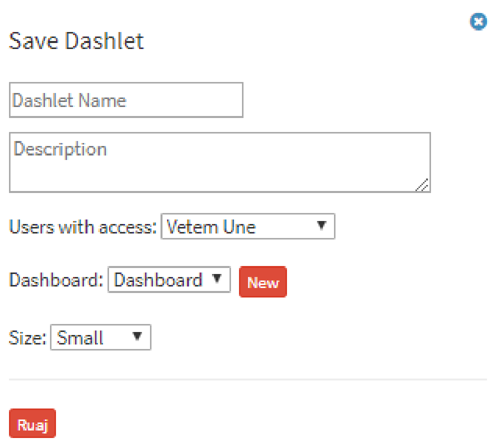


Figure 50. Graph saved as Dashlet

At the moment of saving the graph as a dashlet it is necessary to fill in some fields such as:

- Dashlet name- sets a name to store dashlets
- Description-where a short description of this dashlet can be placed
- Users with access - which determines which users will have access to see the new dashboard
- Dashboard- locations

- Size- size which can be small, medium, big and full

7. General functionalities

This section will explain some of the functionalities that can be found most in the application interfaces and that have the same function so that they can be best used in each of the interfaces. In almost every table, which contains a list of data, we will have Advanced Filters that serve as a way to search for that specific record that you want to be displayed, as follows:

Figure 51. Filters

If you click "*Filter*" button will give you the option to create your own filtering mode. To create a new filtering rule, in the panel that will appear, you must first click on the "Add rule" button and a new row will be added from where you can select the columns by which you want to create filtering. You are allowed to filter by creation date, code, object name, status, a user under review, etc. If you choose to search for example by object name you will be presented with another field in which to select the other search condition which may be:

"**Equal**" - which means that the search must be done as the name is written in the third field;

"**Not equal**" - does the search to display all names that are different from the name you wrote in the third field;

"**Contains**" - which will display the list of partners whose names contain the set of letters you type in the third field;

"Does not contain" - will display those names that do not contain the set of letters you type in the third field;

"Is empty" - will search for cases when that field is that we defined at the beginning, is empty and will display the results;

"Is not empty" - displays all results which do not empty the field we have defined;

"Ends with" - will display the results whose names end with the suffix we put in the third field;

"Does not end with" - is an exception, and does research differently from the end with, so it shows results whose names do not end with the suffix you write in the third field;

"Begins with" - unlike ends with, will display the results, whose names begin with the prefix we write in the third field;

"Does not begin with" - displays the results, whose names do not start with the prefix you put in the third field.

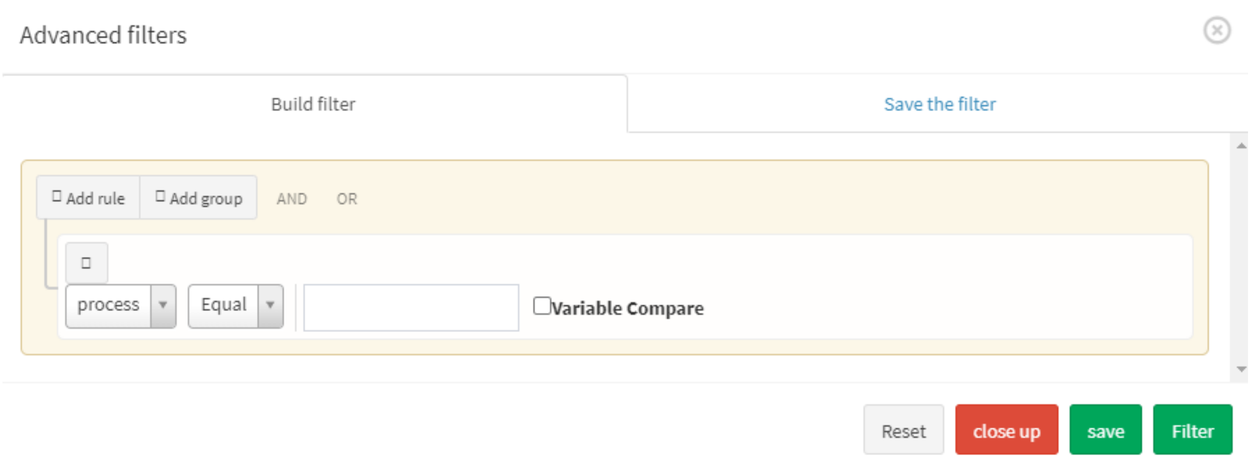


Figure 52. Advanced Filters

Once you have met one of the above conditions, just click on the "Filter" button and the results will be displayed on the grid. If you want to delete everything written up to that point, just click on the "Reset" button. If you want to get out of this panel, just click on the "Close" button. In case you want to perform a more advanced search, being more specific, including all conditional search fields, depending on what you want to search, you can select AND / OR and define the conditions for each of them. If you create a filter that can be used again, you can save it by specifying a name and a short description, and clicking the "Save" button. You can use this filter further by finding it in "Ready Filters". The "Clean filters" option serves to remove the filters you have applied from the table.

In the "Search" field you can perform a quick business search by typing all or part of its name or any other data that appears in the columns of the table.

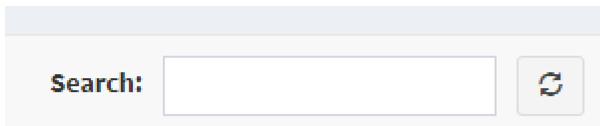


Figure 53. Search

To export the lists in excel format, just click on the "Excel" button. In the displayed panel, select the columns you want in the excel file, as well as if you want to download the information of all the pages in the table or the current page where you are. Finally, click the "Generate Excel" button to download the data file, or "Close" otherwise.

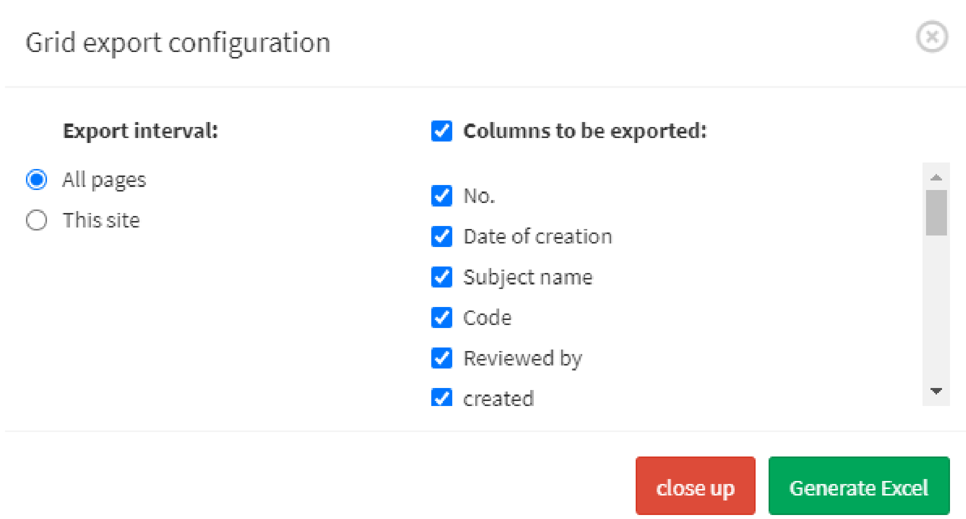


Figure 54. Excel Export

Clicking the "*Settings*" button will display an interface in which you can configure which columns will appear in the data table. Just check the desired columns and click the "*Apply*" and "*Remember the configuration*" button if you want this change to always be saved even after you log out of the system.

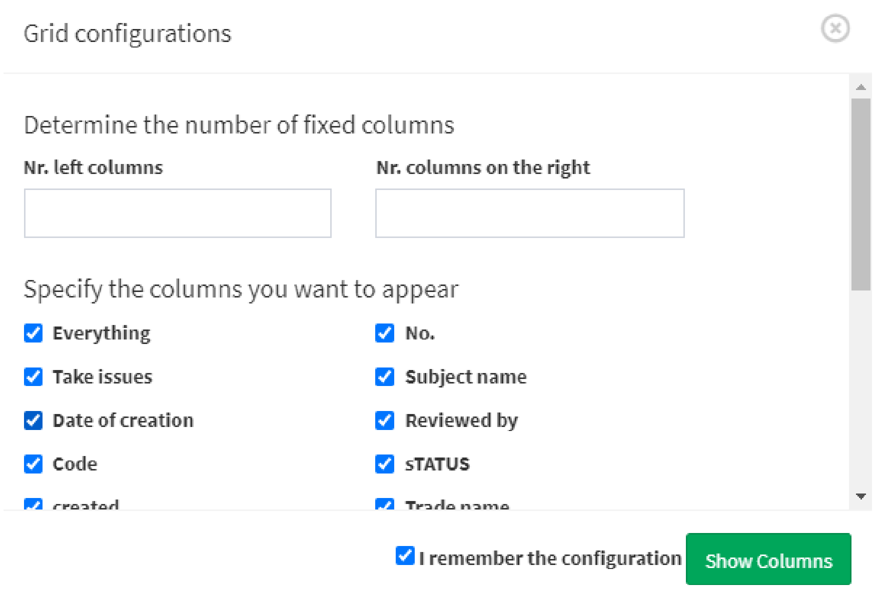


Figure 55. Grid Configurations

To pass the issue from one user to another, the "*Skip the issue*" functionality is used.

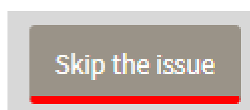


Figure 56. Assign

The panel that opens after you click this button, allows you to select one of the specialists to whom the business (issue) should be assigned. After selecting the specialist name, click "*Confirm*".

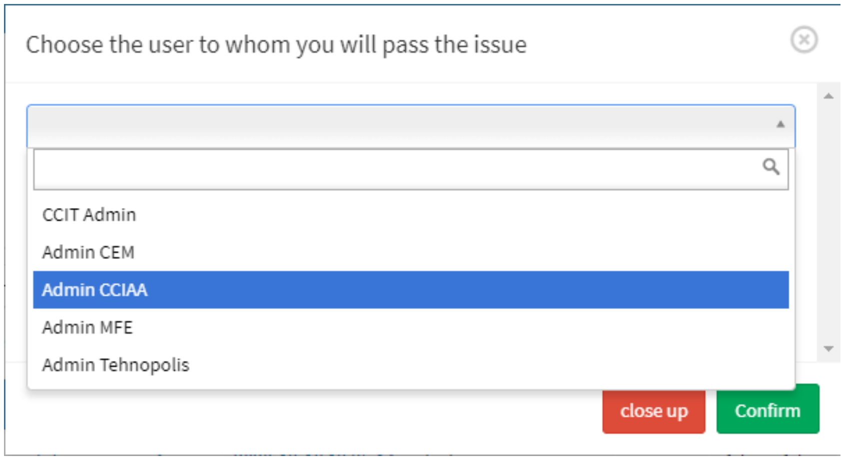


Figure 57. Select user to assign issue (business)

The user to whom the issue was assigned, in his profile gets a notification, which he must confirm by considering it as in the figure below:

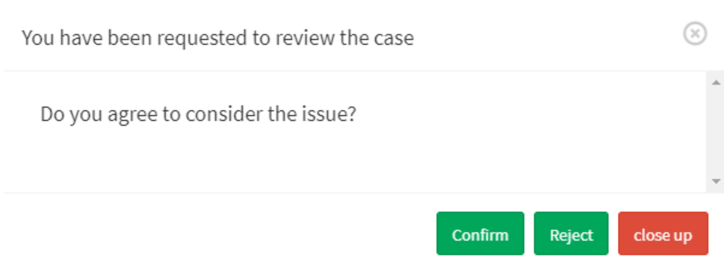


Figure 58. Accepting the issue

Assigning the issues to other users can be done directly from the interface of the business table through the functionality "Assign". After clicking this button, the further steps of passing the issue areas above.

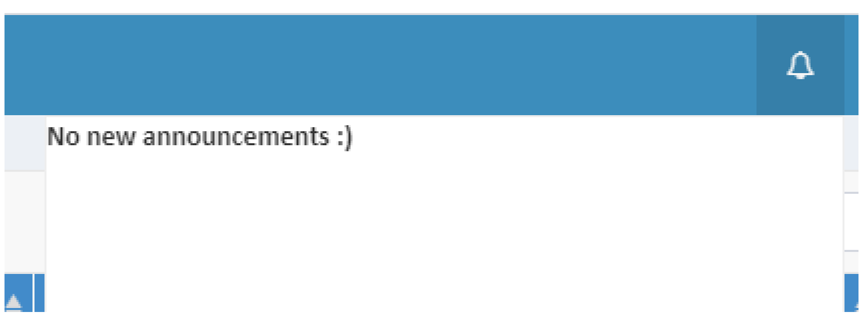


Figure 59. Notification when the case is assigned / received

Clicking on the notification will open a panel to confirm the business review.

Every business may need to save some notes or comments, just click on "*Comments*" and you will see the interface where you can save your comments. Once you have finished writing your comment, you can also save documents related to this issue by clicking on the "*Add Document*" button.

After selecting the document, you want to upload for this issue, you need to click on the "*Start*" button to start the document upload process. If you want to stop this process, just click on the "*Stop Upload*" button. If after uploading the document you want to delete it, just select the document and click on the "*Delete*" button or click on the "*Cancel*" button next to the document.

You can email the comment to the users of your group, or to those who should be informed about the latest developments or from whom you want to get suggestions or opinions on the progress of the issues, choosing the name of each of them as is shown in the corresponding space (@username).

Finally, click "Comment" to send the comment to the user in question.

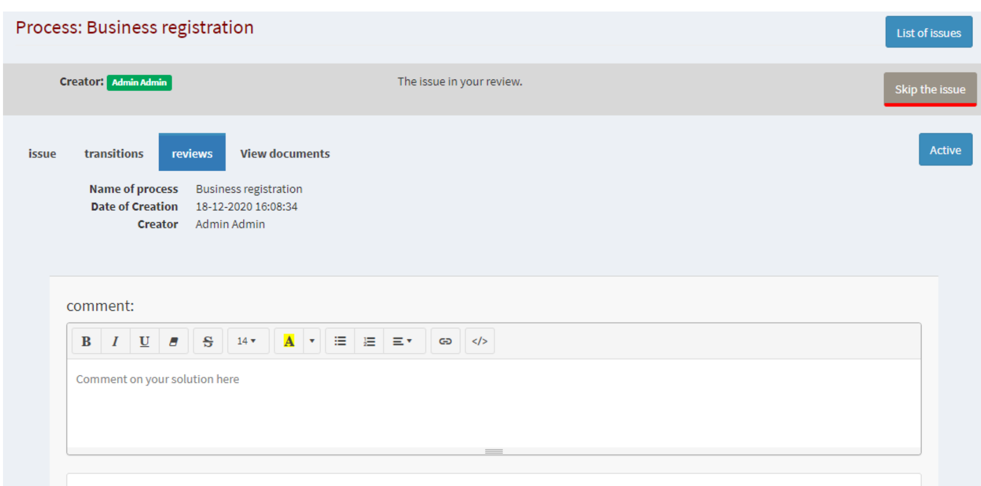


Figure 60. Comment on issues