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beqom 10 Admin Portal

User Guide v1.1

June 2021

beqom.com

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Before You Begin

Preamble: This manual is intended for end users and administrators of the **Total Compensation Cloud Solution**. It describes the standard application features in detail.

The beqom solution is a software program dedicated to the unified management of all compensation processes. It enables you to manage, on one platform, your business processes linked to compensation:

- Short-term performance-based incentives such as commissions or bonus management
- Long-term performance-based Incentives such as shares, stock options or long-term cash incentives
- Salary reviews and any kind of benefit and recognition programs.

A single unified logic and a common approach governs the implementation of these processes by modelling the following components:

Hierarchical relationships and populations (ORG Component)

beqom integrates existing hierarchical people and organization structures and also allows the creation and modeling of additional hierarchy trees and assignments. In addition to hierarchies, populations can be defined based on any criteria and combination of attributes. These populations serve as the basis for eligibility and assignment to different compensation processes and plans.

The combination of hierarchy trees and populations determines which person will be visible to whom and can be assessed by whom e. g. the managers being in charge of pay raises or allocation of stock options to payees.

Compensation Processes (DESIGN/PROCESS Components)

A Compensation Process is set-up to manage targets and achievements of incentive plans or allocate budgets according to corporate guidelines and approval processes across the organization.

It allows you to retrieve and manage data based on different performance indicators for a given group of people for defined periods.

Each compensation process, is typically defined by:

- A set of key performance indicators which can be a combination of individual, team or group objectives, quantitative/qualitative targets, allocation fields, with free data entry options or linked to achievement rules and corporate guidelines
- rules; rules are used to evaluate individual, team or group objectives against compensation criteria during runtime. For each record in the database that meets the criteria, a calculation will be launched.
- validity periods and repetition; each process is linked to a validity period. This period specifies the start date and end date of the process.
- populations; a population is a group of people with common attributes. Population is built with filter based on single or multiple criteria (e.g. job, department, division, country). The assignment of populations to a process determines their eligibility to the plan.
- workflow; workflows ensure that tasks are fulfilled in the right order, e. g. validation of targets set or achievements, evaluations, proposed pay raises or the allocation of bonuses and stock-options according to necessary approval steps.
- Process flows guide users through all necessary process steps

Information Collection (DATA Component)

For many processes the values corresponding to the indicators mentioned above do not exist in underlying information systems. beqom therefore enables the collection of any data directly in the compensation solution via grids, forms, data entry masks, according to process steps, workflows and access rights.

The rule engine is one of the core components of the beqom solution. Data gathered through different processes or uploads is processed in order to calculate achievement and compensation values considering multiple criteria set in rules engine.

Rules for earnings, payments, commission processes, budgetary allocation, exceptions and recommendations linked to salary review processes, bonus processes, and stock option grants, lapses, and exercises are defined with the rule editor and can be setup with free criteria selection and multiple algorithm definitions.

Reporting & Analysis (ANALYSIS Component)

The beqom solution includes a set of reporting and analysis instruments for standard and ad hoc reporting to analyze any information out of the compensation database on any aggregation level in real time. All kind of analysis can be derived using state of the art, integrated business intelligence tools – for individual, collective, management reporting, financial reporting, sales analysis, audit reporting, consolidated reports by country/division, actual vs budget for bonus/salary increase, historical analysis or comparison, etc. Through these reports, each user can view information specific to his level within the organization in accordance with his profile. All analysis can be accessed through a web interface or exported for example via Excel pivot tables.

Communication (INFO HUB Component)

The beqom solutions communication and notification capabilities allow managing all kind of personalized or collective information to all people inside or outside of an organization. Tasks, notifications, documents or reports, including corporate guidelines, bonus letters, payee total compensation statements, can be published and directed to all relevant populations or individuals with personalized information, and made accessible via web, mail or mobile devices.

Simulation (SIMULATION Component)

The beqom solution enables to create, save, compare and publish simulation scenarios out of one screen according to different parameters set; associated rules and populations. For example, the cost of a compensation strategy for an individual or group of people in real time can be simulated and compared to other simulations. The result of the Compensation Simulation is shown in a graphical form in real time once the simulation has been launched. The result shows simulated values versus the originally stored compensation model and one or more saved simulation scenarios.

Start-Up and Navigation

Login & Access

beqom solution is accessed via a web browser with the interface and features common to websites. The application can be accessed via the Intranet company leveraging Single Sign On mechanisms or via the Internet beqom solution.

Users login to the application by entering their user credentials.

- Enter the address of the beqom application in your web browser.
- Login using your credentials (name and password).

The beqom solution opens under the **Landing** page. The Landing page is configurable.

By default, the landing page opens the Home component.

Global Data Protection Regulation

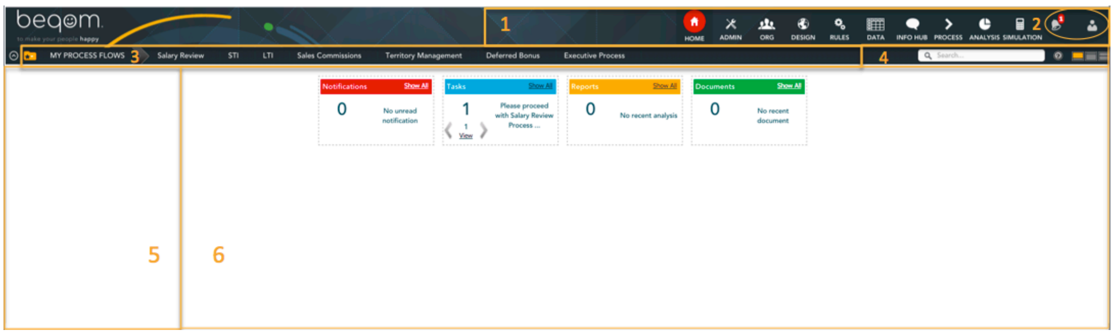
In order to conform with the European Union Global Data Protection Regulation (GDPR), a message banner related to the use of cookies is displayed the first time you connect to the application. Click **OK** to accept the use of cookies and close the banner.

You can view the cookie policy of beqom:

- Hover your mouse over the User Menu (top-right corner of the application window) and then click **Cookie Policy** in the menu.
- Under User Settings>Cookie Policy

Screen presentation

On this view, you find parts that are common to every component and parts that are specific to a component.



1 On top of the screen, the **Navigation Bar** provides access to the different solution components.

2 At the right of all components, there are two icons:

- A **Red circle** with picture: by mouse hovering it displays the information related to the connected user (as the profile), gives access to user' settings (My account to change the profile) and Logout. It is also a quick access to shortcuts and my process flow management.
  - A **bell** is visible depending on the profile permissions and is a quick access to user's documents, notifications, analysis and tasks statuses.

3 Below the Navigation Bar, the MY **Process flows and Quick Access** provides a quick access to select process steps and to select shortcuts.

4 On the right upper corner, you have Search, **Online Help**.

1,2,3,4, are common to all components.

5,6. On the middle and left panel; information, forms and grids may be displayed depending on the component. It is the specific part.

New Interface of the Application

The beqom application has two interfaces. The Admin Portal experience, described in this document, and a new, redesigned interface (with limited functionality).

Provided that your profile has been granted the relevant rights, you can work in the new interface.

To access the new interface:

1. Click the user icon in the upper-right corner of the application window.
2. Click **Switch to New Interface**.

Common view and features Description

On every screen view, a set of navigation, customization and information are accessible.

Navigation Bar

The application provides navigation tabs to access the beqom Solution Components. Visibility of each component is determined by the user profile.

- The **HOME** tab gives users a complete view and access to notifications, documents, tasks and reports and analysis.
- The **ADMIN** tab covers all the content and settings of the application through two main sections – Technical and Functional administration - that can be accessed only by users with the appropriate admin rights.
- The **ORG** tab contains a hierarchy of people and/or structures that represents the company's organization and approval hierarchy. This tab is used to manage payees' data, populations and the company's organization and hierarchy through the sections "Population" and "Administration".
- The **DESIGN** tab contains all processes made available in the application and provides all options to build new and adapt existing compensation processes and set-up workflows. It is divided in two sections: one to set-up the compensation processes and the other to define the process elements.
- The **RULES** tab contains all the compensation rules and different set of rules – so called "execution plans" that are available in the application. This tab enables a user to define corporate guidelines by setting up the compensation rules and by defining the sequence of rules execution via execution plans. The Rules Tab is divided in two sections – Rules and Execution Plans.

- The **DATA** tab contains all data entry grids made available in the application to centrally define and set parameters relevant for splits, thresholds, assignments or other parameters that are relevant to ensure corporate guidelines are met. This tab is used to manage data values, either on transaction or on detailed line item level. Grids can be accessed according to the security settings in the application and exported for offline data entry and imported back to be synchronized with data in the application.
- The **INFO HUB** tab contains all elements to effectively communicate all compensation information to users of the application and everyone involved into the compensation process. Documents, notifications, tasks as well as relevant reports and analysis can be pushed to users of the application – to their personalized landing page – or sent via email.
- The **PROCESS** tab provides users with the ability to manage payee relevant data can be accesses and maintained via the Processes tab.
- The **ANALYSIS** tab access to standard reports and ad hoc analysis available to a specific user profile. Following reporting options are available: standard Reporting (via Reporting Services), ad Hoc Web and Dashboards (via Power View), ad Hoc Excel (via Power Pivot)
- The **SIMULATION** tab can be used to create, save, publish and compare simulation scenarios according to parameters, rules and populations set. Simulation scenarios can be visualized in graphics and tabular views.

User Setting and Information Quick access (number 2)

At the right of all components, there are two icons :

Red circle icon:

- By clicking on the user icon found in the top-right corner of the screen, and then selecting “My Account”: the Left menu is shown with “My Account” and “My Process Flows”

Bell icon:

- by hovering your mouse cursor over the icon

A drop-down menu is shown with the list of all new info items to which user has access to.

Navigation Menu (Number 3)

Navigator Menu provides quick access to the most important pages for each component.

This feature is coupled with shortcuts configuration.

If you put your mouse cursor on a component, the navigator menu is opened with two sections: **Last 10 Items Used** and **Favorites**. If you click on the component, you will be redirected to the component page.

Favorites

To set a favorite you use the shortcuts configuration on the top left panel.

When adding a new shortcut in the shortcut configuration, the shortcut will appear in the navigation menu of the component as Favorite: Favorite is the name of the shortcut and the icon on the right part corresponding to the component.

Go to a location you want to create a shortcut.

- Click on 
- Click on +

Then the shortcut is added to recently added folder and in navigation menu favorites

- Open Navigation menu by letting the mouse cursor on the component

The new shortcut appears at the top of the Favorite list.

- Click on an item to the list to be redirected

Last 10 Items Used

In the **Last 10 Items Used**, you will see the last 10 items you have navigated recently.

You just have to click on it to directly be redirected.

NOTE In Home, you can see all Favorites and last 10 for all components

Process Flows and Quick Access (number 3)

Process flows make the navigation through the application easier by giving the user the option to directly access a specific step of a process flow.

All steps necessary to complete a process flow are listed: e.g. define parameters in grids, view data in reports, assess payees, execute rules, etc.

Users can view and access steps according to their permissions.

Each user can create his individual process flow to enable an easy and fast navigation through the application (see HOME tab).

You can access to shortcuts by clicking on the icon . To remove a shortcut, just click on the red icon on the left of the shortcut.

The user can access also to the process flow management.

- Click on 
- Select Manage My Process Flow

Search, Online Help (number 4)

You can click the **Help** button, on the right upper corner, to access contextual information that guides you through the application. This information is available in 6 languages: English, French, German, Italian, Spanish and Turkish.

At the bottom screen help, you find information regarding the product version.

Search enables user to find items in any component, the icons help seeing which category they belong to.

On the right side near logout button, there is a field

- Type the first characters of what you are looking for. The list is displayed after a few seconds.
- Click on an item to access it

Customizing the Screen

You have two arrows to minimize or expand the Navigation Pane, the left Panel or the User Panel.

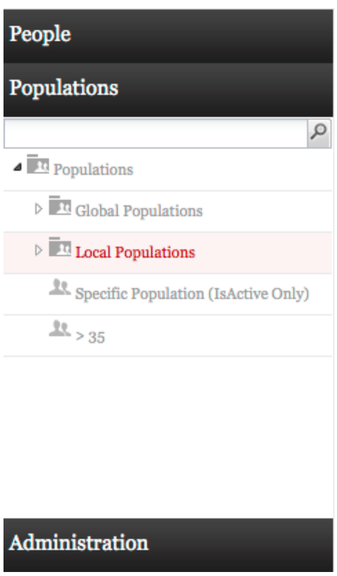
Specific View and Features: Middle and Left panels

Each component has specific display access on data.

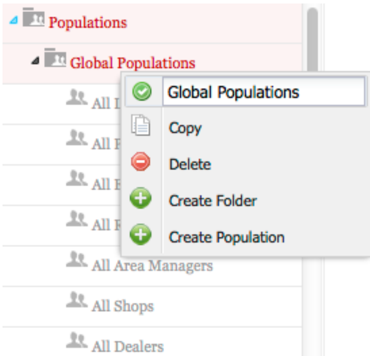
On the left panel, you may have accordions:

Customizing the Sub-menu Tree

You customize the tree by right clicking on an object or folder.



Then, a pop up with different options will be displayed:



- Create a folder
- Copy: copy a folder or an object
- Delete a folder
- Create an Object

You can also drag and drop a folder in another folder or move an object in another folder.

NOTE If an object is in use, a window will inform you that it is not possible to delete it.

Searching an object in a tree structure

All tree structures will propose a search function represented by this field:

It makes it easy to quickly find a specific object within the navigation tree.

- Enter the first letters of the name you are looking for in the search field.
- Press **Enter** or click the icon next to the search field. Names containing the characters entered are highlighted

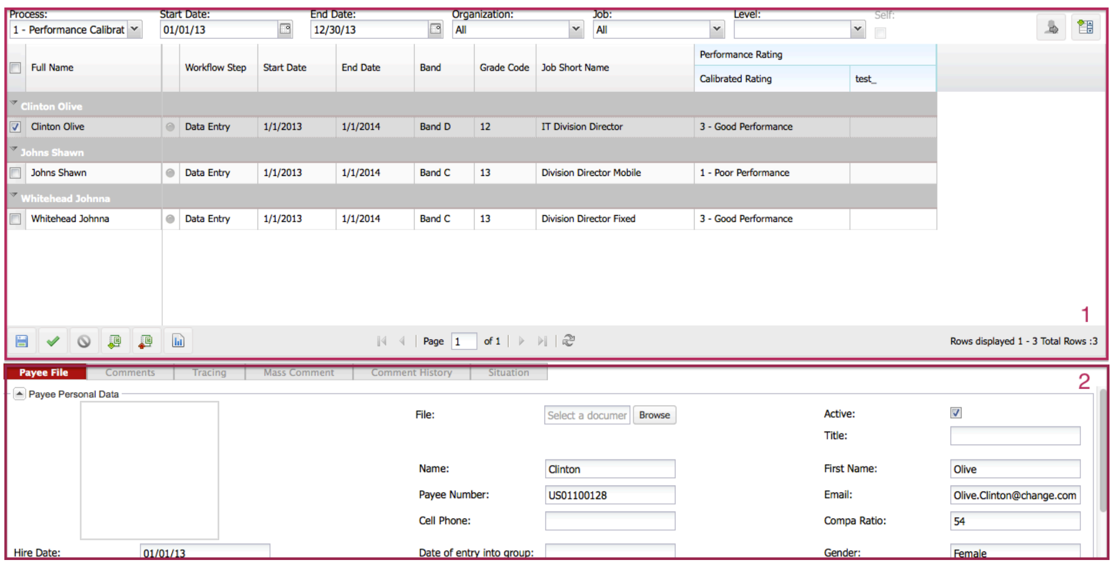
NOTE In search mode, the branches of the tree that do not contain the characters entered are hidden. Click the icon to make them reappear and erase the characters entered in the search field.

NOTE The search is also available on Payee number but the behavior is different. You need to enter the full Payee number and then to expand the tree to reach the payee related to this payee number.

Object Selection and Display: Middle Panel

In the upper middle part of the screen (1), the Grid displays the list of objects contained in a file or linked to another object.

In the lower middle part of the screen (2), the Form shows detailed information about the object selected in the list.



Customizing the Screen

On the upper right corner, you can also customize to show or hide the upper or lower part of center panels.

From left to right:

- show only upper panel,
- show only lower panel,
- show both panels.

For each of these buttons, a second click on the same button will return the hidden object to the screen.

Tips and Tricks

Calendar Feature

Each time this icon is available  that means that you can select the date using the calendar.

- Click on this icon.

A calendar is opened and it defaults the current date.

To have a quicker access to month and year,

- Click on the month at the top of the calendar.

Then a second pop up is opened: select the month and the year you want to be displayed in the calendar and then select your date.

Filter Feature on Grids

Filter fields are available in grids to help you in your search.

The search is symbolized by:

NOTE To remove the filter parameter, click on the blue cross that appears when you put your mouse cursor on the field.

Custom Grid View Features

When displaying a grid, you can move columns and put them in frozen area.

NOTE In Process component, the grid customization won't be saved. Grid customization is set in Grid editor (DESIGN component).

Grid Operations Notifications

On grids, if you performed some operations as remove and/or create a row and you don't save, a notification will inform that there are pending actions.

Then you can either click the button Save and the notifications will be removed or click on the Red cross and then the modifications will not be saved.

NOTE : these notifications will not be available for all grids in the application.

Grid Page Display

At the bottom of a grid, the number of rows is displayed as the total of rows in the grid.

Search Suggestion in Drop-Down Lists

To help you to search in a long list, you can type the first characters in the drop-down list and all the names containing these characters are displayed in the list.

This feature is also available when searching in an object value when creating conditions for rule or for population.

User Details (Top Right Icon)

On the top right, there is an icon.

NOTE This icon can contain a picture if you configure it in My Account

This icon is a quick access to My account and My process flow setting.

NOTE My process flow management can also be accessed by the shortcut icon

There are two ways to access to them:

- by clicking on the user icon found in the top-right corner of the screen: then Left menu is shown with "My Account" and "My Process Flows"

or

- by mouse-hovering over the user icon and clicking the relevant links: "My Account" or "My Process Flows".

Defining Account Preferences

"My Account" Settings

By clicking **My account** in the User Panel, a popup is opened to set options through several solution components.

“My Profile” Section

In this section, you can download a picture and set your active profile:

Select your picture

- Click on the top of the square

A popup to download a picture is displayed

- Download your picture

Then the picture will be displayed in the top right icon.

Select your active profile

- Click on the drop down list.
- Select your profile to be active.

“Global settings” Section

You have access to settings as

- **Default Profile**: default profile which the user will be connected with to the application if he is associated with several profiles.
- **Default** Tree: tree that will be displayed in the navigation tree.
- **Get Notifications without** refreshing **page**: new notifications received will automatically be taken into account without the need to refresh the page.
- Message **Alert Position**: define the position in the screen to display the alert pop-up windows: 4 positions in each corner are available.
- **Enable Accessibility Mode**: enable a new mode adapted UI functionality for better accessibility. Changing tooltip type from ExtJs CSS-typed to standard typed which is called “title” in HTML aspect

“Culture” Settings

You can set culture specific settings as:

- **Culture**: default language used in the application. You can select between the 7 cultures supported in standard
- **Use Culture Specific Settings**: if this box is checked, culture specific settings for numbers and date display will be used in the application. If not, these settings can be customized. The default settings are:
- Thousand separator
  - pt-BR “blanc”
  - es-ES “.”
  - de-DE “.”
  - it-IT “.”
  - en-US “,”
  - fr-FR “.”
  - tr-TR “.”
- Decimal separator
  - pt-BR “,”
  - es-ES “,”
  - de-DE “,”
  - it-IT “,”
  - en-US “.”
  - fr-FR “,”
  - tr-TR “,”

- Date-Time Format
    - pt-BR “d/m/Y H:i:s”
    - es-ES “d/m/Y H:i:s”
    - de-DE “d/m/Y H:i:s”
    - it-IT “d/m/Y H:i:s”
    - en-US “m/d/Y H:i:s”
    - fr-FR “d/m/Y H:i:s”
    - tr-TR “d/m/Y H:i:s”
- Date Format
    - pt-BR “d/m/Y”
    - es-ES “d/m/Y”
    - de-DE “d/m/Y”
    - it-IT “d/m/Y”
    - en-US “m/d/Y”
    - fr-FR “d/m/Y”
    - tr-TR “d/m/Y”

NOTE It is recommended to use 4 digits for a date to avoid uncertainty (could be 1999 or 2099).By the way, if a user wants to use 2 digits, a pop-up will inform him about this uncertainty.

- **Use the specific application culture in reports**: specifies which culture will be used when displaying reports. If selected, the local culture will be used.

NOTE the report should exist in the local culture to be displayed properly.

“Home Page” Settings

- **Number of days before removing items from boxes**: You can set the number of days the information will be stored for in the info boxes before being removed.

“Process” Settings

- **Automatically select last selected process**: the last process you viewed in the Process tab will be automatically saved and displayed when you will return to the page.
- **Automatically select current period**: in the Process tab, the current period is automatically selected in accordance with the current date.
- **Default Appraisal**: Select the value that will be set in the Appraisal drop down list when you will enter in the process

Saving the Settings

On the left lower part, the user can save the changes.

- Click on the save icon

The new settings will be available immediately.

Process Flows

Process flows make the navigation through the application easier by giving you the possibility to directly access to a specific step of a process, according to the permissions of your profile. You can access Process Flows from anywhere in the application.

The shortcuts Folder, located next to the My **Process Flows**, is a section in which you can add shortcuts to folders that you use regularly and access them more easily. You will also use these shortcuts to create process flows.

The My Process flow bar contains Individual Process flows (collapsed into My Process Flow) and Standard Process flows are listed after My Process Flow.

Accessing and Maintaining Process Flows

There are two kinds of process flow: Standard Process flow and Individual Process flow.

Standard process flows are preconfigured in the application. Only functional administrators are allowed to edit them or to create new ones.

They reflect the corporate policy of the company and apply to payees who can view the steps according to their permissions.

User can define individual process flows.

The way to create and maintain both is the same.

Accessing Standard Process Flows

- Click a process flow in the **Process flows and Quick Access** menu to display its steps.
- Click a step to directly access it.

You can then easily navigate into the process and access the previous and next steps by using the arrows.

Maintaining Process Flows

To access to the My process management window, you can either select it into user settings icon and click on My process flow or select the shortcut icon (on the top left part) and select **Manage My process flow**. In both case, you will be redirected to My process flow management window.

- Click Enable Process Flow Management An on-screen guide helps you to create the Process Flow.
- Select the process flow you want to modify on the My Process flows panel.
- You can then perform the following actions:
  - You can change the organization of the process flow by drag-and-drop.
  - You can rename the process flow or its steps by clicking AV button to make all fields editable.
  - You can delete a step by clicking the cross in the right-hand corner.

NOTE The Delete button deletes the whole process. Do not use it to delete a step.

- You can add new steps to the process flow by opening the shortcut folder, and then choosing the step to add. This step is added at the end of the list of steps. You can move it by drag-and-drop.

- Click the Save **Changes** button.
- Click the **Cancel** button to close the edition panel.
- Close the Edit mode by clicking on **Done** in the User Panel.

NOTE Don't forget to close the Edit mode before performing another action.

Creating a New Process Flow

When navigating through the application, you can click **Shortcuts Folders** to add a shortcut of the current page. Shortcuts you create are added to the **Recently Added** folder.

You can create new folders to organize your shortcuts by topics, tasks, etc. and create new process flows.

- Click Enable Process Flow Management. An on-screen guide helps you create the Process Flow.
- Put the mouse cursor on the **Recently Added** folder to view the list of shortcuts you added

NOTE Don't click the folder.

- Click on shortcuts you want to organize in a new folder.

A **New Shortcut Group** is created containing these shortcuts.

You can then perform the following actions:

- You can arrange folders by drag-and-drop.
- You can rename the Shortcut Group or the folders by clicking the **Rename** button to make all fields editable.
- You can delete a step by clicking the cross in the right-hand corner.

Then you can select the kind of process flow you want to save.

Only function administrator will be access to Default process flow button.

By clicking on the first icon, you create a new folder.

By clicking on the second icon, you create an Individual process flow.

By clicking on the third icon, you create a Default process flow.

NOTE The Delete button deletes the whole folder. Do not use it to delete an item.

- Click the Save **Changes** button.

In case of new process flow, the new process flow is added to the Process Flows navigation bar or is collapsed in the My Process Flow.

- Click on **My Process flow** to expand and see the individual process flows.

HOME Page (HOME Tab)

The **Home** Page is a configurable page.

By default, the **HOME** page gives a user the complete view and access to notifications, documents, tasks and reports.

In this section, we will describe the default home page but depending on your profile, the Home Page can have different layout.

Notifications, Tasks, Analysis, Documents

In this section, we will describe the content of the four boxes: Notifications, Documents, Tasks and Analysis.

Accessing Notifications

Notifications inform users about actions that have been taken such as: data validation, rule execution, start/end of a process, etc.

Use the arrows for a rapid view of the titles of the latest notifications you received.

- Click **Read** to open the last notification you received and view its detail.
- Click **Show All** to open the history of your notifications.

You can access the step related to a notification by opening the notification and then clicking the **View** button in the detail view.

NOTE You can set a read notification as “Unread” by right-clicking the notification, and then clicking Set as unread.

Accessing Tasks

Tasks inform users about actions that need to be performed to complete a process.

Each user can view their own tasks with the current progress for each one, and access them.

Use the arrows for a rapid view of the titles of your tasks.

- Click **Show** to view your last task, and click the task to view its detail.
- Click **Show All** to open the list of your tasks.

You can access a task in the application by opening it, and then clicking **View** in the detail view.

Accessing Analyses

Analysis allows a user to view the list of recently published reports, and quick access to them.

- Click on Analysis icon on the user panel on the left
- Click on a report
- Click on Open. A popup is opened
- Click on **Show.** The report is displayed.

Accessing Documents

Documents include all types of business documents provided centrally to outline common or individual goals and objectives, annual budget reports, operational documents, guidelines, etc.

These documents can be common to all payees, populations or individuals.

Use the arrows for a rapid view of the titles of your documents.

- Click **Open** to view your last document in detail, or click on the green arrow next to **Open** to directly download the document that is displayed.
- Click **Show All** to open the list of your documents.
- Select a document

You can download, preview (for pdf only) document, accept and reject documents by clicking on the icons

- Click “View in Document Library”

You will be redirected to Info Hub/Document Library to relevant section (New to To Review)

- Click “View All Documents”

You will be redirected to “ Info Hub Document Library’s “All documents view”.

NOTE Once a document is seen or reviewed, or once the availability date has expired, it will no longer be shown in these lists. It will still be available in the ‘All documents’ view.

NOTE Permissions: the document box is only visible on the home page if user has permissions to access document box AND documents (Info Hub Inbox/ Documents, Info Hub/ Document Library), AND it has been chosen to be displayed for the home page boxes (see Home Page Management)

You can download a document by opening it, and then clicking **Download** in the detail view.

Or by clicking on this icon 

You can also have a preview by clicking on 

For some documents, user actions are requested such as approve or reject.

- Click on the document you want to open

If these buttons  are shown, actions are expected from you:

- Click on the available buttons

A second popup will ask you for confirmation.

NOTE You can also add a comment. This comment is only visible for you and is logged in History grid in INFO HUB.

Administrator Workbench (ADMIN Tab)

The **ADMIN** tab covers all the content and settings of the application through two main sections – Technical and Functional Administration - that can be accessed only by users with the appropriate admin rights.

Technical Administration

The synchronization section is used to synchronize the tables and views created in SQL Server.

In the Universe Management section, you can define – in different classes of universes – the type of universes usable by beqom solution.

In Settings section, you have access to parameters to customize the application for administration point of view. These parameters are set for all users.

In localization, beqom gives administrator the opportunity to choose specific names for buttons, grid, components etc.…

Synchronizing Tables/Views & Data Security

In the Synchronization section, you import and synchronize the tables created in SQL Server with the beqom compensation solution so that they are available in the XML data repository.

For sensitive data, an encryption service is available to encrypt/decrypt with encryption keys kept on premise.

Data Security feature allows specific access to data depending on profile, team or user.

Data security can be applied on grids, rules and rules execution, and *ad hoc* reports.

- grids: row level filter to data. E.g. if a user belongs to "ROME", he will only see data (rows) related to ROME
- rule: filter on rule execution: E.g. if the criteria is 'idPayee', the calculations will be performed only on the data in the universe that fits the criteria
- ad hoc reports: restrict data access to add ad hoc report or model based on user attributes e.g. "Europe".

Synchronization

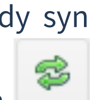
When clicking **Synchronization** in **Technical Admin**, the list of synchronized tables/views is displayed.

- Click the **Import** button at the bottom of the list to import the table/view you want to synchronize.

The grid of all available tables/views is loaded.

- Select a view/table in the list.
- Select a type for you view/table from the drop-down list.
- Click the **Add** button.

The grid/view is imported and automatically synchronized.

NOTE Note: You can synchronize one or several table(s)/view(s) already synchronized by directly selecting it (them) in the list and then clicking the Synch button . All previous references will be deleted. Then you can select the synchronized tables/views.

Configuring Synchronized Tables/Views

A south panel is opened with 3 or 4 tabs depending on type:

Properties, **Fields**, **Data Security Settings**, **Dependent Items**

Properties

This tab is displayed only for synchronized tables/views as Import Table/View Type.

- Check Available in ad hoc report models

Then this view will be available when creating an ad hoc model.

NOTE If the view is used in a model and Available in ad hoc report models is unchecked then a warning will prevent to change it. You cannot remove access to a view if it is used.

Fields

In this tab, you can define which data will be encrypted.

- Select a column
- Click Encryption Enable
- Click **Save**.
- Click **Export Objects** to export the file and put it in the folder related to the encryption service.

NOTE The encryption might have impacts on performance and on operations that you would like to perform in the application. We don't recommend using if for massive data encryption.

NOTE The settings need to be enabling to have the data encryption. See **Settings Management**.

Data Security Settings

The application provides a user interface to define this data security layer.

The data security layer uses the user attributes to define what will be displayed to each user. User attributes can be gender, payee code, country, job grade for example.

- Go to ADMIN/Synchronization
- Select a table

A window is opened at the bottom with three tabs:

Fields, Security settings, Dependent Items

- Click on Security settings
- Click on the padlock to allow the security

NOTE When the security is allowed, the table cannot be accessed by any user.

Then, a window with four tabs is opened at the left bottom:

Properties, Profiles, **Teams**, **Users**.

In properties, you can select the security you want to use by default

Then, select the tab you want (Profile, Team, User) depending on which category you wish to apply the security.

Then

- Select a new security view if you don't want to use the default one
- Select a name within the category (Profiles, Teams, Users) you have selected
- Tick 'Data security' for this name
- Select the criteria to be applied: by default (see note2, below), criteria are based on the user attributes. The application will compare the criteria with the last recorded user attribute. For example, if you put 'country' as the criteria, the user will see only data corresponding to his country. If during his professional life, he belongs to different countries, the application will select the last recorded information in his history to show the corresponding data.

NOTE When no criteria are selected then the table is accessible without restrictions.

NOTE The list of criteria is managed by a view in database and can be easily adapted to your needs. Ask your consultant for more details.

- Select the operator AND or OR if you have multiple criteria
- Save

Managing Multiple Criteria

If criteria on multiple levels (profile, team, user) have been defined, they will be applied in priority order as user first then team (if no criteria for user) then profile (if no criteria for user and team).

Nevertheless, if a user belongs to two teams that have criteria, the applied criteria on that user will be the OR on the criteria.

Behavior when applied on grids

If you defined a grid with association as example a field with country that is associated to the table that contains the list of countries (PARIS, ROME, etc.), then you can define restriction on the both tables:

Based on criteria and user attributes, if a user belongs to ROME, he will see only data related to ROME. Then, in the drop down list, if you don't select any criteria on the associated table, the drop down list contains all the countries. The user could select any of them but when saving the row will disappear because the main grid has a restriction criterion based on the country of the user.

So, if you want to see only the restricted country in the drop down list, you should put the same criteria on the table used for the drop down list.

If you apply criteria on the table used for the drop down list, then the user will see all the data on the main grid but he could only select the allowed item in the drop down list.

Behavior when applied to rules:

If you want to put data restrictions on a rule execution, you should select the universe that the rule will use to do its calculations. Then you can apply criteria.

When a user runs the execution, the calculations will be performed only on the data in the universe that fits the criteria. For example, you select criteria as idPayee, then when a user will execute the rule, in the transaction table, the calculations will only be done for the idPayee corresponding to the user's idPayee. All the other calculations will remain unchanged.

Behavior when applied on ad hoc reports:

You can restrict data access to an ad hoc report based on user attributes. The restrictions can be either on the model either on the report itself.

Dependent Items

This tab lists the dependent items as for example transaction table.

Managing Universe Views

A universe is a collection of data required to calculate and output a result of a compensation calculation. In the Universe Management section, you can define – in different types of universes – the view of universes usable by beqom.

Defining Universe Types

When clicking **Universe Management** in **Technical Admin,** the list of existing universe views is displayed.

- Click the **Add** button at the bottom of the list.

A form is generated to define the properties of the new universe type.

- Select a universe type, a universe view and a universe transaction from the dropdown lists.

NOTE In case of a new universe, please use the Auto Generated Transaction Name, and then the system creates automatically the correct transaction table in SQL Server.

- Click the **Save Changes** button.

The universe type is created and added to the list.

- Click the **Cancel** button to close the definition grid.

Deleting a Universe View

- Select a universe view in the list.
- Click the **Delete** button.

The universe view is deleted and no longer appears in the list.

Managing Settings

The Settings Management section allows you to set parameters to customize the application for administration point of view. Then, these parameters are set for all users.

This section includes three types of settings regarding global, login and grid items.

Global Settings

- **Default culture**: the language that will be used in the application.
- **User Image Max KB**: the maximum size file for the image.
- **User Image Formats**: the different formats that are accepted for the image (jpg, etc.)
- **Accepted file types**: define the file types that will be allowed in the application.
- Delete process values when changing population assignment: if you tick, your process values will be deleted.
- **Session Timeout In Seconds**: define the duration before being disconnected.
- **Custom Layout**: check it to configure a custom layout.
- **Disable Localization**: check it to make the keys appearing. Once it is checked, the application will be reloaded. By default, it is unchecked.
- **Automatic Mail Service Enable**: tick to automatically send notifications and tasks by emails at fixed time.
- **Redirect URL** after **logout**: this specific URL is used to redirect the user towards another URL after logout.

- **Audit Configuration**: specifies which level of auditing log changes you want to set:

  None *: modifications aren't recorded,*

  Log*: modifications on the name of tables, the user id, the date and the type of change are recorded.*

  Log detail *: any change is recorded.*

NOTE To avoid negative performance impact, some objects could not be recorded with level three (Log Detail). The records are put in specific tables in the SQL Server and in the current application version, there is no standard user interface to display the records.

- **Maximum number of rows in excel**: specifies how many rows you can export in one excel file.
- **Show SSRS filter in** reports: if it is checked, the SSRS report controls are exposed. For security, it is recommended to use application report controls and remain it unchecked.
- **WalkMe Key**: WalkMe is a software product that lets you build a customized tutorial within the application. It is available as an add-on option should you wish to provide it as a training/help tool for your users. In order to operate WalkMe within beqom you must insert the java code created by the WalkMe editor into the WalkMe Key section.
- **Disable Standard hierarchy access**: in case of hierarchy security assignment, you may want to show only the hierarchy that has been delegated to a user. By selecting it, the user could not see his own hierarchy.

NOTE The effect can be seen in process component.

- **Infinite tree loop check level**: this parameter sets which level you want to check in case of infinite loop when publishing a hierarchy: an infinite loop is for example a payee that is the subordinate of himself. For performance issue, we recommend 5. So, the system searches the first duplication up to level 5. Then a pop-up will inform you if there is duplication.

NOTE Only trees that have Repeat Node as check allows to use several times the same node.

- **Enable File Password Protection**: this parameter is to protect any document that can be exported outside the application or imported inside the application. It is applied on any objects that can be exported or imported as data grid, process grid, reports. The only format that is supported is Excel.
- **File Password Length Min**: it is the minimum number of characters the user needs to put in the password.
- **File** Password **format**: you can set regular expression in this field.
- **Maximum Tree** Search **Result**: the system searches for Maximum Tree Search Result items and if it is more than this value it will stop and an information message is displayed for the user to add new characters to have less than Maximum Tree Search results to display. In any case, if there are too many results, it is not usable and it may take time to display.
- Maximum number of payee count in each crediting batch
- Maximum crediting retry count per batch
- **Use DocuSign** Development **Account** : If the account you are using is demo account (not a purchased account) this property has to be set True (checked), otherwise it should be False (unchecked)
- **DocuSign User** Name : The account username that is used to authenticate to DocuSign portal
- **DocuSign Password** : The password of user that is used to authenticate to DocuSign
- **Enable beqomEasy**: when checked, the "beqomEasy" menu will be visible under Admin / Functional Admin and the functionality will be enabled. Please contact your beqom administrator for more details.

Grid Settings

- **Numeric values right aligned**: all numeric values will be right aligned in the grids.
- **Default decimal precision**: number of decimals displayed for all fields of type 'decimal' in grids.
- **Default width**: default width defined for all the columns in the grids.
- **Apply Grid Filters For** SuperAdmin: grid filters will be applied for Super Admin users. If not, SuperAdmin has access to all data in the grid and doesn't behave as "normal" user

Process Settings

- **Process History**: all the values saved in a process will be traced and displayed in a Tracing sub tab in the Process tab.
- **Delete related data when process deleted**: when a process is deleted all data related to it will be deleted in data base
- **Delete** related **data when population detached**: when a population is de-assigned to a process, all data will be deleted in data base
- **Process Filter Width Type**: choose between Dynamic (adapted to the longer name) or static
- If static, field **Process Filter Width** is available. Enter the width in pixel
- **Workflow Step Filter Width** Type: choose between Dynamic (adapted to the longer name) or static
- If static, field **Workflow Step Filter Width** is available. Enter the width in pixel
- **Form may items on radio button list**: you can define a limit of items you can display as Radio button. If the list contains more than this number, the system will automatically convert the radio button as drop-down list in the process (not in the preview).
- Click the **Save Changes** button.

Localization

beqom product supports 7 languages: English, French, German, Italian, Spanish, Brazilian/Portuguese and Turkish,

In localization, beqom gives user the opportunity to choose specific names for buttons, grid, components etc.…

Standard Localization

In **standard localization**, you will find all names that are used in the product by default.

- Select the item in the culture you want to modify the name
- Click on Value

The field becomes editable

- Change the **name**
- Click **Save** button
- Click on Generate localization file

Logout, clear the cache of your browser and Login. The new name will appear in the culture you have selected.

Custom Localization

In custom localization, the purpose is to provide a way to manage field names for specific table/object etc.….

NOTE If you set the localization option for a specific field as true in ADMIN/synchronization, the name is automatically added with an additional GV prefix. And this name is displayed with the prefix if you don't enter correct localized wordings. To do so, you need to go to Custom Localization.

First, select in the list a name that you want to localize:

NOTE To have a correct integration in the application, you need to follow some rules as to put exactly the same information for name, Module type and element ID as the original one.

- Click **Add** to add a row.
- Fill **Name** with the same name.
- Fill **Value** with the localized wordings.
- Fill **Module Type**: select in drop down list the adequate type (grid, field grid…) with the same module type.
- Fill Element ID with the same element ID.
- Select the culture in drop-down list.
- Click **Save**

- Click on Generate localization file

In Home/My account, select the culture you entered a new value. Logout, clear the cache of your browser and Login. The new localized wordings appear in the culture you have selected.

Layout

This feature allows to set a custom layout from the UI and to set a custom layout per user.

- Select Layout
- Click +

A window in south panel is opened with 3 tabs: **Properties, Assignment and Layout**

Properties

- Enter the name
- Enter a description
- **Set As default** if you want this custom layout to be used for all users.

NOTE If you set another custom layout for specific user, it may be reset.

If **Set As default** is not set, the tab Assignment can be accessed to assign user

Assignment

- Drag and drop the user to be assigned.

Layout

In this part, you have two modes:

Basic

You can set easily some parts of the application

Advanced

You can add more things in the custom layout. It is a CSS Editor.

NOTE You can download some picture and use it in CSS Editor.

- Sav
- **Logout** and Login as User. The new layout is displayed

Functional Administration

In this section, you can define profiles to limit access, users that access to the application, teams as users group.

In Business Universes, you define a set of available objects used as a basis to create remuneration rules and guidelines.

Scheduler is ideal for recurring actions. Among available actions, you have email sending, rules executions, plan executions, Stored procedure and maintenance mode.

Managing User Data

Each beqom solution user must have an assigned user account in the system. The Users section enables the functional administrator to define access data and functionality specific to each user.

Viewing/Editing User Data

When clicking **Users** in **Functional Admin**, the list of existing users is displayed.

You can view and edit payee information by clicking on the name. Search fields are helping you to filter data and find a specific user.

NOTE To return to the list of users, you have to empty the research fields by clicking the blue cross that appears when you pass the cursor over a field.

Creating a User

- Click the **Add** button at the bottom of the list of users. A form is generated to define the properties of the new user.
- Properties
  - Fill the fields and click the **Save Changes** button. A new tab **Profiles** appears.
- Profiles
  - Select the profile(s) you want to give to this user.
- Click the **Save Changes** button.

The user is created and added to the list.

Deleting a User

- Select a user in the list.
- Click the **Delete** button. The user is deleted and no longer appears in the list.

Managing Teams

beqom compensation solution enables to define group of users that shares same objects as rules, execution plans, analysis, processes, simulation.

Then, when the team has been created, you go into each object in Share tab to enable the access rights type (read, write, execute etc.…) for this team.

NOTE In your own profile, you need to have sharing rights to be able to share an object with the team.

NOTE If a member of the team hasn't got the right access to the object in his profile, the share will not override the profile access restrictions so he will not have access to the object.

Viewing/Editing Team Data

When clicking **Teams** in **Functional Admin**, the list of existing teams is displayed.

You can view the members of a team by clicking on the name of the team. Members of the selected team appear grey in the list of users.

Creating a Team

- Click the **Add** button at the bottom of the list. A form is generated to define the properties of the new team.
- Fill the fields
- Click **Add.** A new tab appears to select users.
- Drag and drop users you want to add to the team
- Click on Save. A search is available to help you to find a specific user. The team is created and added to the list.

Deleting a Team

- Select a team in the list.
- Click the **Delete** button. The team is deleted and no longer appears in the list.

Managing Profiles

In the Profiles section, you will define to which beqom solution components each profile has access to and its authorizations under each tab.

Viewing/Editing Profile Data

When clicking **Profiles** in **Functional Admin**, the list of existing profiles is displayed.

- Click a profile in the list. Search fields are helping you to filter data and find a specific profile.

NOTE To return to the list of profiles, you have to empty the research field by clicking the cross that appears when you pass the cursor over a field.

The module of rights for this profile is displayed. For each solution component of the application, you can view if access is allowed or denies for this profile.

- Click the padlock to turn access to “Allowed” or “Denied”.

Creating a New Profile

- Click the **Add** button at the bottom of the list. A south panel is generated with different tabs: Properties and One tab per Solution Components as Home, Admin etc.…
- Go to **Properties** Tabs
- Enter a name for the profile.
- Select the Home page among available home pages
- Indicate whether you want the profile to have access to the Admin Portal UI, the new UI or both.

NOTE To design a Home page, go to Home page management section

- Select the landing page among components

NOTE The default Landing Page for all new (and existing) profiles is the Home component. The Landing page can be assigned per profile in Admin/Profiles. The profile must have access to the component to be able to choose it as a landing page. Logo's link goes to the Landing Page.

- Click the **Save Changes** button. The profile is created and added to the list.
- Click the profile.
- Go to next component. The module of rights for this profile is displayed.
- Click the padlock to turn access to "Allowed" or "Denied" for each module.

NOTE In Info Hub, close to the padlock there is an additional icon . By clicking on it, it allows showing home boxes and bell notifications even if Info Hub component isn't visible.

- Under each module with "Allowed" access, give the appropriate authorizations for each module tree: Read / Copy / Modify / Create / Export / Delete
- A search is available to help you to find specific items into modules tree.
- Click the **Save Changes** button.

Deleting a Profile

- Select a profile in the list.
- Click the **Delete** button. The profile is deleted and no longer appears in the list.

NOTE A profile cannot be deleted as long as it is assigned to a user.

NOTE A number is displayed near the save icon to indicate that you have done some changes. Then you can save all at the end. The number disappears.

Managing Business Universes

Business Universes are the basis to define rules in the rules engine.

They consist of a set of available objects used as a basis to create remuneration rules and guidelines. Rules criteria are defined by using these business objects assembled in a universe. You can configure your own business objects in a universe and use them in the rule engine.

Viewing/Editing Business Universe Data

When clicking **Business Universes** in **Functional Admin**, the list of existing business universes is displayed.

- Click a business universe in the list. Search fields are helping you to filter data and find a specific business universe.

NOTE To return to the list of business universes, you have to empty the research field by clicking the blue cross that appears when you pass the cursor over a field.

The tree is loading with the properties and the business objects linked to this universe.

- Click the **Cancel** button to close the properties screen and return to the list of business universes.

Creating a New Business Universe

- Click the **Add** button at the bottom of the list. A form is generated to define the **properties** of the new business universe.
- Enter a name for the universe and use the dropdown lists to fill the other fields.
- Click the **Save Changes** button.

NOTE The reference date field is used to define the reference date that will be used when rules will be applied. Then you can put a more meaningful name in Reference date name.

The business universe is created and added to the list and a new tab appears.

NOTE Only universe name and reference date name (Date Name field) can be changed after a universe has been created.

- Switch to the **Business Objects** tab. A form is generated to link the business objects to the universe.

First, if there is no existing folder (except Root), you need to create a folder.

- On the left side, create a folder by right-clicking. A confirmation message is displayed.
- Right-click on folder and select the action you want to perform:
  - Rename the folder by entering the new name in the field.
  - Create a folder
  - Create an object
  - **Remove**: you can remove the selected item (folder or object)
- Select Create an object On the right, new fields appear:
- **Object Name**: Enter the name of the object
- **Universe field**: select in drop-down list the object in the universe you want to access. Then, the three fields (**Source**, **Display**, **Value**) are automatically updated.
- Click the **Save Changes** button.

Deleting a Business Universe

- Select a business universe in the list.
- Click the Delete button. The business universe is deleted and no longer appears in the list.

Scheduler

Scheduler is ideal for running actions at any schedule- now, later, or recurring…

In the current version, available actions are: execute a rule, execute a plan, send an email, generate a maintenance period, or specify notifications aggregation duration.

Scheduler Access Rights

Scheduler access is profile-based access.

Based on the module rights, each customer decides which profile can do what within the Scheduler module. For example, there could be a profile responsible for setting the mail sender schedulers another profile could be responsible only for Rules and executions plan, and a third more technical profile, responsible for the schedule of stored procedure.

You can give access to scheduler events as Notification Aggregation, mail sender, Stored Procedure, execution plan, Rule, Maintenance mode.

- Go to Admin/Profile
- Click on a profile. South panel is opened
- Click on Admin
- Select Functional Admin/Scheduler
- For each of them, you can select Create, Delete or Modify.

NOTE All the events are visible when profile has read access to scheduler

NOTE For scheduler item with several events, if user cannot edit one or more of the events of a scheduler, he should not be able to edit scheduler properties.

- Click Scheduler. A window is opened in the center panel with 3 tabs: Calendar, Grid View and Schedule log. A user can create a schedule from Calendar or from Grid View.

Calendar View Tab

The display is a calendar and on the left panel, you can filter by event type and see only specific events. You can create and delete a scheduled event.

Grid View

It is possible to view all the schedulers in this view, or only for selected time frame like in the calendar view.

- Go to Scheduler (Admin/Scheduler)
- Click the Grid View tab on the top The Scheduler Grid View is shown. It displays all the schedulers scheduled and all the related events.

The events can be grouped by scheduler:

- Check Group by scheduler
- Click Show All to display all schedulers otherwise the selected period is shown only: e.g. current month
- Click Grid Column labels to sort
- Fill in search criteria to filter column's content
- Click a row to see the scheduler details
- Click DELETE to delete the selected scheduler
- Click COPY to copy the selected scheduler and its events as a new scheduler

In both views, you can create a new schedule

- Click **+** at the bottom of screen. A new form appears with two tabs: **Scheduler** and **Events**.

In **Scheduler** tab, you put all timing information. In **Events** tab, you define which type of event you want (rule execution, plan execution, Stored procedure, notifications aggregation, maintenance mode or email).

- Select **Scheduler** tab

Scheduler Tab

- Fill the fields:
  - Name: Enter the name of the scheduler
  - Type: One-time or Repeat
  - Enable: tick to enable the scheduler

Depending on the type, a set of fields is available

- In case of One-Time, fill the fields in One-time occurrence: Date and Time
- In case of Recurring Type, fill the fields describing the frequency (Daily, monthly, etc.), the occurrence, etc.
- Click **Save** button In the calendar, a new event has been created.

NOTE If there is another event with the same name, an information message informs you that it is not possible to have twice the same name.

The second tab is now available

Events Tab

- Click Events tab. A form is displayed
- Click **Add** to add a new event
- Enter the event **name**
- Select the **event type** in the drop down list.
- Click **Save** button. A new event is added to the list of items that should be run at the time you defined. Now your event has been properly set.

NOTE If you schedule a Mail Sender event, then all emails regarding notifications and tasks that have been defined in Communication component as Send as Email will be sent.

Event as Maintenance Mode

It is now possible to carry out maintenance within the application and limit the impact to specific profiles. This is done using Maintenance Mode.

When maintenance is active for a given profile, users with that profile who are actively using the application will be logged out and unable to log in until maintenance is completed. The application is still running for non-blocked profiles. The maintenance mode is not stopping the application but preventing some users completing certain actions that could impact or be impacted by some jobs or batch executions. To recap, users are shut-out but the running treatments are not. Anything running in the back-end will not be impacted by maintenance plan mode. (e.g. rule/ execution plan in simulation)

If the users have other profiles, which are not blocked, they can choose to continue with these

- The profiles which are in maintenance are shown in red font and background color in profile selection drop-down lists

If users have no additional profiles available they will be shown the information defined in the application when scheduling the maintenance mode. If user is using the application when the maintenance mode is starting, he can be shown a notification in advance so that he will have enough time to finish the work he is doing and eventually switch the profile.

The maintenance mode is set as a scheduled event and it can contain scheduled activities - such as batch job execution.

- Go to Scheduler
- Create a new schedule
- Select the event as Maintenance Mode
- Select the profiles to be blocked during maintenance (multiple selection)
- Select when the preventive message will be displayed (as example, 60 minutes before the maintenance mode).

NOTE Note: This message will be displayed every 10 minutes if the user closes it.

- Select the estimated duration of maintenance period in minutes

NOTE This delay is respected even if events are ready earlier. If events are ready the maintenance mode continues this duration except if the user chooses to **Terminate after events completed.**

- Select **Terminate after events completed** if you want "early" stop of maintenance mode
- Save

NOTE The maintenance scheduler without other events is shown in the new calendar category as Maintenance Mode.

Event as Stored Procedure

This feature allows some users to run scheduled specific batches that execute a list of tasks.

- Go to Scheduler
- Create a new schedule
- Select the event type as Stored Procedure
- Select the stored procedure in the drop-down list of available stored procedures. The stored procedure will be executed once the time is achieved.

Other Events

You can schedule a rule and execution plan then the rule or execution plans will be executed at a specific time:

- Select rule or Execution plan

You can also schedule emails: when setting a notification and you select email, you can delay the sending of the emails depending on the priority.

- Select Mail Sender

You can also aggregate all notifications and send only one email at a schedule time:

- Select Notification aggregation (See INFO HUB TAB for more details).

Execution Log Tab

In addition to scheduling activities, it is now possible to see the results of the scheduler executions in the new screen Execution Log. It enables viewing and searching executed schedulers and events and to see the execution success status and the log message.

- Go to Scheduler (Admin/Functional Admin/Scheduler)
- Click the **Execution Log** tab on the top. The Execution Log List is displayed
- Click grid column labels to sort
- Fill in search criteria to filter column's content

Widget Editor

In the current version, this feature allows creating charts that are used to illustrate process.

The application proposes 3 types of charts: gauge, pie chart or bar chart.

- Go to ADMIN/Functional
- Select Widget Editor
- Select **Add.** A new form is created

Properties Tab

- Enter the **name** of the widget
- Enter the **type** of the widget you want to create
- Do Save. A new row is created on the grid on the top. A new form is displayed to define the widget parameters

Parameters Tab

This tab allows defining the parameters of the chart. Depending on chart type, the number of parameters varies:

A typical example for a gauge bar is the stock options allocation: A manager has a certain amount of stock options to allocate. Then he can split it among all his subordinates and see in the gauge bar if he has consumed all his allocated stock options and he can see what each subordinate has consumed.

When defining a chart, you need to know which data change will impact the chart display.

Three modifications impacts are defined:

- **input**: indicates that the change related to this field set will impact the chart display.
- **output**: indicates that the change in the input will impact the output of the chart.
- **fixe**: indicates that this field is independent to any change.

- Select the process it will be applied on
- Select the indicator then the field that will be displayed in the chart.
- Select if the data is coming from a parent (a manager for example) or not: Tick or untick **Parent**.
- Select where the data is loaded in **Source** : Client or Server
- Select the **Chart update trigger**: on which user action the chart will be modified.
- Select in Modifications impact: Input – Output – Fixe
- Select if you want to have the data in cache or not: tick or untick **Values in cache**

NOTE Most of times, if you tick Input, untick parent

- Do Save
- Redo these operations for every parameter you need to display in the chart.

Attaching a Widget to a Process.

To attach the defined widget to the process and make it active, you need to:

- Go to SET UP TAB
- Select the process
- Select the **Attached object** tab. A new form is opened
- Enter a name
- Select the Type: **Widget**
- Select the widget you want to attach in the drop down list.

Displaying the Widget in the Process

Now you can go to Process, select your process and a new icon is displayed at the bottom of the grid: 

- Select a row and click on this icon. The chart is displayed at the bottom.

Environment Manager

The aim of this module is to synchronize objects between a source environment and a destination environment.

NOTE It includes new objects and modified objects but not deleted objects.

Access rights

The creation of a package or the deployment of a package can be given separate access rights when defining profiles. (see Profile definition)

Creating a Package

- Go to Environment Manager
- Select **Create a package** on the left panel. A page is displayed in the center panel.

- Select one or several objects you want to create a package with
- Enter a description
- Click on **Run.** The new package is created. To access to this new package, you need to go to **Deploy a package**.

Deploying a Package

- Go to Environment Manager
- Select **Deploy a package** on the left panel. A page is displayed with existing packages.
- Click on a package. A grid is opened at the bottom with the status of the package.

- Click on **Deploy** icon on the right side of the center panel.

NOTE The icon on the right indicates the status of the object compared to the destination environment: can be new, can be an update on an existing object, …

NOTE In the current version, it is not possible to put more than 10 objects in a package. All tables and views must be created in the destination environment in SQL server if they don’t exist before deploying in this environment.

Home Page Management

In this section, you can design a home page to a or several profiles.

You can also allow specific components on the landing page, set by profile. The landing page is the page user arrives after log in. To set it go to ADMIN/Profiles section.

Designing a New Home Page

Go to ADMIN/Home page Management

- Click **Add** button. A window is opened in the south panel with 2 tabs; **Properties**, **Parameters**.

Properties

- Fill the Home Page Name and description
- Select the profile you want to assign the Home Page to.

NOTE You can select several profiles

- Select the template (HTML, Info Items boxes or Report)

Parameters

Depending on the template type, parameters tab proposes different configurations.

In case of

HTML:

- Hybrid editor in which user can write text and format it, or also paste html, including for example links to images (stored online/internet)
- Variable: User Full Name to get to display user's name dynamically when included to the html page
- Manage translation content by checking **Use Translation** and enter translation for each supported language.

Info Items Boxes:

This window allows choosing which Info Items boxes are shown and in which order

- **click X** on the top corner of the box to hide the box from home page
- **drag and drop** to change the order of the boxes
- reset to default template, click the link Reset

NOTE Info Items profile permissions define if an item is visible for profile or not, therefore some boxes selected for home page still may not be shown for certain profiles if they do not have access.

Report:

- Select the report
- Check **Hide Tool Bar**: then the Tool bar won't be visible
- Select Alignment
- Select Size Type: Percentage or Pixel
- Select **Width** and **Height**
- Save

Monitoring

This feature allows monitoring execution. In addition, it is possible to create an email if the execution duration lasts more than a defined threshold in minute.

- Go to Admin/Functional Administration
- Select Monitoring on the left panel. A grid with two tabs is opened: Events - Logs

On Events,

- Click on + to add an event

On the south panel, two tabs are shown: Properties, Alert

- Select Properties
- Set Enable Monitoring
- Set the event you want to monitor: Rules, Condition, Execution
- Put a name for the event
- Save
- Go to Alert
- Enable the Alert. Then the setting for email is accessible
- Select the threshold that will trigger the alert
- Enter the email in Email To

NOTE Email addresses should be separated by ;. In variables you can select some predefined email addresses.

- Enter a subject
- Enter a mail content
- Save

When this event is executed, a new record is added in Logs and if the execution lasts more than threshold then Is Alert Sent is checked and an email has been sent.

NOTE This feature is linked to the scheduler so the scheduler configuration should be done.

Organization Manager (ORG tab)

The ORG tab contains a hierarchy of people and/or structures that represents the company's organization and approval hierarchy. This tab is used to manage payees, populations and the company's organization and hierarchy through two sections: Populations and Administration.

The ORG tab allows definition of permanent sharing, a delegation on vacation, or also limiting standard hierarchy access per user. You can assign another tree and tree node to a user, for a selected period. In addition, it is possible to define exclusions to hierarchy nodes.

Managing Populations

In the **Populations** section on the left panel, you can view all populations that are available in the application. By clicking a specific population, you can see how the criteria are build up, see a preview list of the members of this population and export it.

Payees who belong to the selected population will appear red in the chart.

Creating a New Population

You can create new populations by right-clicking the **Populations** folder, and then clicking **Create Population**.

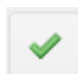
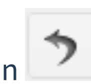
Defining Population Properties

In the **Properties** tab you define the properties of the population.

- Enter a **name** for the new population.
- Select from the drop-down list the Business **Universe** it will be based on.
- Click the **Save Changes** button.

Creating a Condition

In the **Conditions** tab you select the business objects that define the population.

- Click a business **object** to display the list of available objects values.
- Use drag-and-drop to insert the **values** you need to describe the population. A calculator brings together Boolean, comparison, arithmetical, date and time function.
- Click the functions you want to insert in your condition. The condition directly displays into the zone below.
- When finished, click the **Test** button  to check the validity of the condition.
- If the condition is invalid, click the **Reset** button  to delete the condition you entered.
- When the condition is valid, click the **Save Changes** button.

NOTE The Reset button does not undo your last action. It returns to the last saved criteria.

Previewing and Exporting a Population

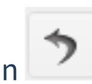
In the preview tab you can view the list of members in the population, according to the conditions you defined.

You can also export the list by clicking on the export button 

NOTE Note: if you want to add columns in the preview, you can modify the grid PopulationPreview in Data tab

Editing a Population

- Click a population in the **Populations** section. The definition form for this population is displayed.
- Click the **Condition** tab to edit it.
- Click a business object to display the list of available objects values.
- Delete items you no longer want to use in the condition and use drag-and-drop to insert the new values you need to describe the population. A calculator brings together Boolean, comparison, arithmetical, date and time function.

- Click the functions you want to insert in your condition.
- When finished, click the **Test** button  to check the validity of the new condition.
- If the condition is invalid, click the **Reset** button  to return to the previous condition.
- When the condition is valid, click the **Save Changes** button.

NOTE The Reset button does not undo your last action. It returns to the last saved condition.

NOTE As for all trees, you can create folder to put your populations (see Startup and Navigation for more details)

People Administration

In the Administration section, you can view, update and complete payee data. The generated files give each manager access to very detailed information about his payees when he needs to perform an evaluation, give a raise, etc.

Creating Payee Data

- Click on Payees on the left panel
- Click the **Add** button at the bottom of the list. A grid is generated to define the properties of the payee.
- Fill the fields.

- **Payee Personal Data**: all personal information about the payee.
- **Current Situation**: current position of the payee in the company.
- **Payee Compensation Details**: data regarding the compensation of the payee.
- **History**: compensation history of the payee.

- Click the **Save Changes** button.

A popup with additional information is opened:

- **Create a new history record** for this payee that is disable at the first creation of a payee
- **Effective date**: is the date upon which something is considered to take effect.

NOTE Some information as picture, name and position are reflected and updated automatically in organization chart.

Managing and Maintaining Master Data

In the **Payees** tab you can view, complete and update payees data.

Files generated when clicking a payee name allow each manager to access very detailed information about his payees when he needs to perform an evaluation or give a raise, etc.

- Click a payee name to load the grid with all the information about him.
- Make the necessary changes under each tab.
- Click the **Save Changes** button.
- A popup with some additional information is opened. This information will be used to update the History tab. If you only want to update payee information, do not tick **Create a new history record** for this payee. If not, tick it and new record will be created in History tab. If you want to change the **Effective date**, enter the date.
- Click on **Save**.
- Then, click on **History** tab to see the different modifications.

In **History** tab,

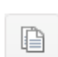
- Click on a row. A popup is opened with payee information. This pop-up is Read-only.

NOTE It is not necessary to save your changes under each tab.

Managing Hierarchy Trees

The hierarchy management functionality within the beqom Admin Portal interface is limited, for security reasons. The definition of the organization structure is to be performed by a beqom consultant. For more information, contact beqom.

Copying/Pasting a Hierarchy in the Hierarchy List

- Click the  button The hierarchy tree is copied. At the end of the name of the new copy the text "(copy)" highlights which is the copy. User can rename the copy by double-clicking the name in the list

Publishing Hierarchy Trees and Organization Structures

- Click the tree you want to publish in the list.

- Click the **Publish** button  below the list. A pop-up is opened to override an existing publication hierarchy or to create a new hierarchy. If you select New,
    - Choose option New and type in the published hierarchy name which you want to create
    - Click on icon  to continue
    - The hierarchy tree is created as a new hierarchy tree

If you select Override, additional checks are performed before overriding existing hierarchy:

- Choose option Override and select the published hierarchy name which you want to override from drop-down list
- Click on icon  to continue

When there are pending transfer requests a pop-up warning with details is shown and user can choose to continue or cancel

- Click on icon  to continue

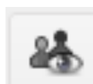
When there are existing hierarchy securities a pop-up warning with details is shown and user can choose to continue or cancel

- Click on icon  to continue

The published hierarchy is overridden

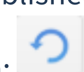
The tree appears in the **Published Tree List**.

You can rename it by double-clicking its name, and then clicking the **Save changes** button.

You can click the **Preview** button  to preview the organizational chart of the tree.

Restoring a Tree from the Existing Published Tree to the Tree List

This feature restores a published tree in the non-published list.

- Go to ORG/Administration/Hierarchies
- Select a hierarchy in Tree list
- Select a hierarchy in Published Tree list
- Click on Restore button:  . Then a window “Manage Restore” is opened:
- You can select that you want to create a new tree
- Select New
- Enter a name

NOTE By default, the name will be Copy_ original name.

Or

You want to override an existing tree.

- Click Override original
- Select the tree you want to override
- Click on Continue button: 

Managing Master Data Dimensions and Attributes

In the **Administration** section, a **Dimensions** folder provides access to data dimensions and attributes used in the application.

Dimensions are repositories where data is stored and maintained. This data is used in payee repository, in trees, in rules, in populations, etc.

Only a user with an Admin profile can access and manage data dimensions and attributes.

Data is divided into several dimensions: Title, Territory, Structure, Pool, Organization, Nationality, Job, Grade, Geography, Gender, Family Situation, Department, Currency, Cost Center, Contract, Category Payee, Agreement, Activity Status….

- Click a dimension to view its available attributes.

You can delete an attribute by clicking it in the list, and then clicking the **Delete** button.

You can add a new attribute in the dimension by clicking the **Add** button below the list, filling the empty fields, and then clicking the **Save Changes** button.

Hierarchy Security

Hierarchy Security Assignments allow definition of permanent sharing, a delegation on vacation, or also limiting standard hierarchy access per user. You can assign another tree and tree node to a user, for a selected period. In addition, it is possible to define exclusions to hierarchy nodes.
With hierarchy security assignment it is possible to use hierarchies with process.

- delegation to a user (even non payee) to any level and any branch in a hierarchy
- can define a profile or several profiles for delegation
- can delegate a tree/node (branch) to several users
- can define exclusions to nodes
- can filter on population
- can define start and end dates for security assignments

In ORG, the access definition is done within hierarchy. In PROCESS, the process permissions are defined - they are based on ORG hierarchy security definition and in addition workflow permissions can be overwritten.

- Click on Add at the bottom. A window is opened. If you have Hierarchy Security Admin permissions in your profile,

  - Select the user you want to act as delegate
  - Select a Profile among the available profiles for this user
  - Select the hierarchy you want to delegate
  - Select the node in the hierarchy
  - Select the category: Permanent. Delegation and Vacations.
  - Select Start Date and End date: during this period, the hierarchy security assignment will be applied.

Then you can define which population will be considered in this hierarchy assignment.

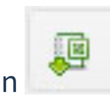
You can exclude or include one or several populations.

- Check Use Population Filter
- Select the type as Exclude or Include
- Select one or several populations
- Save

Then you can add additional individual exclusions

- Click on Exclusions tab
- Click on +
- Select a node
- Click on Save. Redo the operations if you want to exclude more.

NOTE If you don't have Hierarchy Security Admin permissions, the process is similar but you can create some hierarchy security assignment only on the nodes that have been delegated to you and you cannot exclude or include a population but you can do individual exclusions among available.

Provided you have the rights, you can export the list by clicking on the export button 

Now the next step is to assign the defined hierarchy security to a process.

Go to PROCESS TAB section.

Process Workbench (DESIGN Tab)

The DESIGN tab contains the processes that are available in the application and all the options to build new compensation processes and set-up workflows. This tab is used to manage your compensation processes through two sections – Process and Administration.

For managing processes, such as Budgeting, a process can be displayed via a grid with related hierarchy levels and payees.

To better cover the needs of managing processes, such as Bonus or Performance per payee on 1 page, a process can be managed and displayed via a form.

Designing a Process

In the **Process** section, you will set up your process by defining its properties and linking together indicators, fields, periods, rules, workflows and assigning populations.

You can create a new process by right-clicking the **Process** folder, and then clicking **Create Process**.

By right clicking, depending on the right access, you can also copy or delete a process.

NOTE When copy, a new process is created with the extension (Copy) to indicate that it is a copy except the population assignment. You need to assign the population.

Defining Process Properties

When creating a new process, a form is generated with four tabs to set it up: **Properties**, **Setup and Share**.

Properties

In the **Properties** tab you configure the basic settings on the process.

The screen is divided in two:

Defining Generic Process Settings

- Fill in the fields.
  - Name: enter a name for the process.
  - **Type**: select a type for the process (Stock Options, Salary, Bonus, Commission, ICM, …). In administration, you can define your own process type.
  - **Comments**: optional information.
  - **Layout Type**: Grid or Form. Depending on the selection, the setup tab will change.
  - **Use workflow**: if it is ticked, that means that a validation workflow is used in this process and then a workflow design tab is available.

NOTE Once you have saved, you cannot untick this setting

  - **Appraisal**: enable this option if you want to allow a user to access to manager only, Managers & reporters or reporters only data.
  - **Comment Level**: define if you want to add a comment based on the indicator or based on a field.
  - **Period**: select the period you want the process to apply.
  - **Start Date**: Enter the start date of the process
  - **End Date**: Enter the end date of the process
  - **Calendar period**: you can define if the process iterations will start at the beginning of the month or at start date of the process.
  - As example, if a frequency is monthly and the process start date is the 10th of the month. If you unselect this option, then all process iterations will start at the 10th of the month. If you select this option, the first process iteration will start at the 10th of the month, then the second and following iteration will start at the 1st of the month.

- **Consider only payee nodes for level calculation**: in case of hierarchy that contains some structure, if it is checked, the calculation for Level will skip the structure level to show level or to give workflow permissions.
- **Can Simulate:** set if a process can be simulated or not. If yes, it will be accessible in Simulation Component.
- **Simulation Report Name**: enter a name for the simulation report. This report will enable you to simulate and preview the chart in the report.
- **Frequency**: define a frequency for the process (weekly, monthly, yearly, etc.).

Grid Setup

NOTE Features in grid setup are only for grid based process and aren't supported for form based process.

- **Level Filter:** Set a default level filter per process**.**
- **Enable grouping:** allows to hide or show the grouping feature in the process grid
- **Page Size**: you can set the default value for the page size (number of rows) in the process grid for each process. By the way, the user could change it in the process view.
- **Import / Export:** Select the options for excel: Import, Export, Import and Export, None
- Wrap header: Enable "wrap text" for column header, where the column width can be smaller and the text is shown over 2 or 3 lines rather than only have the option to show a 1 line description making the screen very wide with long descriptions
- Header Tooltip: Display the full header content on mouseover
- Payee Picture: Show payee's pictures next to their names in the Process screen

NOTE You can set per profile if the excel import and excel export are available within Admin/Profiles/Process. If a profile does not have the excel export and/or import capability then it will not have the excel options even if it is defined in the process. Excel offline is not supported within a form based process

- Click the **Save** button.

Setup

Depending on the process type, some tabs will not be available:

- In process grid layout type, 6 tabs are available to set-up a process (Columns, Visibility, Workflow, Attached Objects, Weighting, Conditional Validation)
- In process form layout type, Visibility and Conditional Validation aren't available.

Selecting Fields in the Process

Grid Layout Type

If you want to show hierarchy and payees in the same display for example

This tab is called Columns because the process is managed by column.

In the **Columns** tab you set up information columns and indicators.

Go to **Columns** tab

If you want to add an indicator field or an information field,

- Select a row on the right side
- Drag and drop to the left side. The column is added to the preview.
- Click on Save to save the change or cancel to discard.

A preview of the process grid is displayed.

In this preview:

- You can use drag-and-drop to move columns in the grid.
- You can freeze an information column by drag and dropping into the frozen area or
    - Mouse-hover the column header
    - Click on the arrow
    - Select Freeze or Unfreeze

NOTE When creating a frozen area, a scroll bar at the bottom is displayed for the "non-frozen" area.

NOTE You should have at least one frozen column in the grid. This setting is managed in the table in SQL server.

You can modify the new width of the standard columns (Start Date, End Date, Workflow Name, Workflow State) and it will be applied in Process.

- Mouse hover the header near the line to get a double horizontal arrow
- Click on it and expand or reduce to left or right

You can add a **calculated field** into the grid: the purpose is to add new fields on existing indicators in the grid.

On the left corner of the selected columns grid, there is this button: 

This button is used to define a calculated field to make calculations on fields (indicator fields and information columns) within the process grid.

- Click on 

 to open the Calculated Fields editor.

NOTE After clicking in the selected columns grid, all candidate fields for a formula are highlighted by 

 in column "Calculate".

A south panel screen is opened

- Click on Indicator and select in drop-down list

If you want to add a new field to an existing indicator:

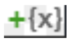
- Select an existing indicator in the list
- Select the new field name

If you want a new indicator:

- Select Add new indicator
- Enter the new field name
- Enter the new indicator name

Then enter the calculation:

You can select the fields you want to add by either

- Click  in the field you want to add on the selected columns grid

or

- Mouse hover the header of the column to make the arrow appear.
- Click on the arrow at the right of field name you want to add to the calculation.
- Select Add To Formula

The field appears in the south panel and you can operations to do the calculations.

Click on Save

On the selected columns grid, the calculated fields are highlighted by  in column "Calculate".

If you want to reopen a formula for a specific field

- Click on 

NOTE To see the south panel, you need to have this option "Show Both" selected 

To close the calculated field editor,

- Click on the RED cross

NOTE Note: if you remove a calculated field then the formula is erased that means that when you add again, the formula is empty.

Form Layout Type

If you want to evaluate payee by payee as in Performance evaluation for example.

This tab is called **Design**.

In that case, the application provides a form editor to design the form.

You can show or not the default form header

- Click on Show default form header

You can create a form with containers and fields.

Creating a Container

- Click on Add Container 
- Select the number of containers: 1*1,2*1 or 3*1
- Edit the container  and go to properties Selection
- Select the name
- Select if you want a panel
- If panel is selected you can define if you want the border in Enable Container Border
- Set the number of field per row in **Field per row**
- If you want to have repeated container, check **Repeated Container**

Repeated containers enable form users to add or remove sections of form based on their needs, e.g. to add a new goal.

Admin creates containers one by one manually then he indicates which containers are going to be repeated. Then in process form system automatically hides containers and shows only one. With buttons the user can add or remove dynamically repeated containers.

- Set the Group name to link **repeated** container

Inside a container you can add fields.

Creating Fields Inside a Container

- Click on Add field 
- Edit a field by clicking on 
- Go to Properties selection on the right
- Select Field Type: Label, Information, Indicator

If you select **Label**, you can enter text or you can use HTML editor to have more sophisticated label (with image, layout etc.)

- Click Use Html
- Click on Html Editor. An html editor is opened
- Click on  to edit the html or use the menu.

If you select **Information**, you can add information field.

If you select **Indicator**, depending on the type, controls are different as for drop-down list.

Instead of using a drop-down list, you can use a radio button.

- Select Control Type as **Radio Button**

NOTE You can define a limit of items you can display as Radio button. If the list contains more than this number, the system will automatically convert the radio button as drop-down list in the process (not in the preview). To set the limit, go to Admin/ Settings Management/Process

You can hide the indicator name in indicator label to have a shorter indicator name displaying only indicator field name

- Uncheck Show indicator Name in labelSave

Visibility

Once you have set the process grid, you can set the visibility to access to the fields and display options for end user. For each profile, you can define the column(s) that an end user can see.

For grid process:

Then 3 tabs are displayed: **Visibility Permission, Default view, Flexible View, Default Reset View.**

- Click on Visibility Permissions

This screen shows all profiles, and all the columns selected in columns-tab for the process. A Power User can choose the visibility of each column per profile. If no column is selected, the process is not shown to profile at all. Not that all columns are searchable.

Using the visibility feature enables showing each profile the process specifically adapted to their needs (i.e., they will not be shown columns that they do not need). These columns are not accessible at all for the profile. This approach also works for indicator fields.

This visibility setting overrides the column selection so that profiles must be given visibility to see the columns selected to the process. Only the columns selected can be given visibility. The power user must give visibility after making the column selection, otherwise selected columns will not be visible.
For processes with workflow this defines the columns in grid, but after per workflow step the information in column can be hidden per profile.

A panel is opened on top.

- Select the profile you want to give visibility for the columns
- Save

In Default and Flexible View tabs, you can set the display option you want to give to end user by profiles.

The user can then decide on the visibility of certain columns if the option has been enabled.

Go to **Default View**

Here you can define which columns will be always been visible or invisible when the user will open the process

- Select the columns per profile

Go to **Flexible View**

Among the visible columns, you can give the opportunity to hide them or make them visible to the end user. Then the end user will have access to this column in the process in the menu (by clicking at the right of the column name).

- Select the columns per profile

NOTE If column initial state is invisible, the flexible state is checked and disabled. If a column is hidden, no option can be added in display option.

In the last tab **Default Reset View**, the power user can decide to reset the process display view for a specific profile

The process administrator can centrally push users with selected profiles to default settings. This may be needed for instance when changing a previously optional field to mandatory.

- Select the checkbox for the profiles for which you want to reset their user's view to process to default
- Click on the button Reset, Confirm the action. The user's view to process is reset to default view for selected profiles

For process form

NOTE If there is no field set as visible in a container so the container won't be shown.

Two tabs are displayed: Visibility permissions, Preview:

- Click on Visibility Permissions. The list of available profiles and fields are displayed
- Check the fields you want to be seen for a specific profile
- Save

To see the preview

- Click on Preview
- Select the profile. The layout is shown.

NOTE In the preview, if the process has a workflow, the workflow validation bar isn't shown.

When logging with this specific profile, only selected fields are shown.

Workflow

The access rights for indicators/fields can be defined per profile. Additionally, validation, mass-validation and level can be defined per profile. A group of profiles with same access rights can be edited at the time because it is now possible to define permission groups for each workflow step. Permission groups can contain different profiles and access rights for indicators/fields can be defined for each permission group.

There are two types of access rights for indicator/fields: visibility on content and editability.

This feature is available for both grid based and form based process.

After filling Design,

- Click on **Next** to go to **Workflow**
- Click on + at the bottom. A window is opened
- Enter the name of the step to configure
- Drag and drop a profile from profile lists to Profiles Assigned to Permission Group.

NOTE You can add several profiles with the same access rights in a permission group.

- Select the Level

NOTE If you ticked the Only this Level, only this level in the hierarchy will have access to this step.

- Select Validation and/or invalidation, mass validation and/or mass invalidation ability
- Select the indicator/fields access rights in the Indicator Configuration table for this profile. In case of form-based process, the setting is done fields by fields by clicking on these icons:  (not visible – not editable).

NOTE To make a field editable, you need to make it visible first. Certain fields are not fields editable, such as calculated fields for example.

- Click on **Save**.

The profile or several profiles with the defined access rights will be added to the step permission groups.

Redo the operation to add a new permission group to the selected workflow step permission group.

You can copy a step to create a new step with same content or a step permission group to create a new group with same access rights but profiles need to be assigned as each profile can be only assigned once in one step.

- Click on  to create the copy

Attached Objects

In the **Attached Objects** tab, the person who created the process or an administrator can attach objects such as report, form or widget to this process. You can also define how this attached object will behave as to be closed after saving.

You can set visibility per profile.

You can remove standard payee tabs.

- Click on manager report
- Drag and drop to add reports
- Click on a row to make the properties appear
- Change the name of the tab
- Select Show by default: then in process, the report will be opened automatically.
- Click on **Modify.** The properties in the grid are updated.
- Click on **Save.** The preview is updated

From preview, you can reorder the manager reports

- Drag and drop to reorder
- Click on **Save**

NOTE If you set several manager reports as default, the first one on the left in the preview will be opened. If there is no defined default report, no report is opened automatically.

For payee tab and widgets, the settings are similar but you don't have Show by Default available only for report managers.

In addition, in payee tab, you can remove the standard tabs as payee form, comments, history, etc.

NOTE You can attach only one widget per process. Widget is not supported for process form layout.

In Parameters tab, you can define the height, if the attached Objects remain open or are refreshed after saving.

Weighting

In the **Weighting**, you define the rate for each indicator. The sum of all weights of all indicators for a process must be equal to 100%.

These rates will then be used in the Rules editor to launch calculation.

- For each indicator row, double-click the '**Weight'** field to make it editable.
- Use the arrows to select a value, or directly enter a value into the field.
- You can define a "**Start**" and an "**End**" period for each indicator.
- Click the **Save Changes** button.

NOTE The start and end period should be included into Start date and end date of a process. If not, an error message is displayed.

Conditional Validation

This feature allows the setting of conditional data validation on data entry in Process fields.

For example, you may want to prevent a manager from entering another value besides Job level B. You can use this feature to do it.

A new tab has been added: **Conditional Validation**

- Click on a field. A south panel is opened with 3 tabs: **Condition, Action when false, Action when true.**

The condition is used to define the formula:

- Click on **Condition**
- Click on **Add To** in the grid in the top to add a field in your formula
- Select an operator in the calculator
- If you want to check your formula before saving, click 

Then, you can configure the action when the condition is false or true.

- Click on Action when false

In the screen, you can define if the value can be saved or not, the warning message and colors when the condition has not been met. You can specify if the message will be displayed on change by clicking on **Select Show warning on change.**

NOTE If allow saving is selecting and no message, then no default message will be displayed. **Show warning on change** is only available if **Show warning message** is selected

You can also configure the action when the condition is true:

- Click on Action when true

In the screen, you can define colors when the condition is met.

For colors, click on Reset default to restore the default colors.

Below the Reset Default button, there is a preview to show the result of your colors setting.

- Save

Then the validation will be applied in the process (Process Component).

NOTE The validation condition can be done on information and indicator fields.

NOTE In process form only, if a field is used in conditional validation and removed, the user is informed with a pop-up and where this field is used in conditional validation. If the user accepts to remove, all conditional validations that use this field are removed.

Process Status

This feature allows managing a process life cycle in time for different profiles and is available for grid and form layout process.

Creating a New Status for a Profile

At the creation all statuses are Hidden so nobody can see the process including SuperAdmin.

- Click on a profile. At the bottom, a screen is opened with the different process statuses
- Select + to add a new status
- Click on **Status** to make a drop down appear
  - **Hidden**: the process is not shown.

    - **Read Only**: the process is shown but none fields are editable even if they were in the past. And Save button isn't displayed.
    - **Active**: The process is shown and the fields followed the process workflow if it is defined as before.

- Select the status
- Click on **Start Date** to make it editable
- Select a Start Date.
- Save

The end date will be set automatically to 12/31/99 and the end date of the previous status is set automatically to avoid gap.

NOTE You can't select a Start Date before today date.

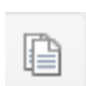
Deleting a New Status

- Click on the icon  to delete. The status is removed

NOTE It is impossible to delete a status in the past.

Coping Profile Statuses

If you define statuses for a profile and you want to apply to another profile:

- Click on  . A new window is opened at the bottom
- Select the profile you want to apply
- Click on Replace. The statuses are applied to this profile

NOTE The statuses that are before today date aren't copied.

NOTE When copying a process, the process statuses are not copied to the new process.

Sharing Access and Maintenance Rights for Processes

The person who created the process or an administrator can assign rights to a team for the process.

- Click a team in the list. The selected team appears grey. The list of rights you can assign is loaded in the “Assign Rights” list.
- Select the rights you want to assign or check the “Select All” to add all conditions.
- Click the **Save Changes** button.

NOTE You can define a period for the share rights to apply. If no period is defined, these rights will be permanent.

Defining the Structure of a Process

Under the process you have created on the left panel, a structure with folders has been populated automatically to set-up the indicators, the hierarchy, the population or individual assignment, the grids and the rules that are linked to the process.

Parameters as grids, population, rules and execution plans are mainly used in Simulation component.

Assigning Indicators

On the left panel, in the **Indicators** folder of a process you can assign indicators.

By adding an indicator to this folder, the indicator is added in process as when you do it from process setup.

- Select the indicator(s) you want to assign from the “All Indicators” list and use drag-and-drop to move them, one by one, into the “Assigned indicators” list.

You can remove a field by **right-clicking** it, and then click **Delete node**.

- Click the **Save Changes** button.

You can click a specific indicator in the navigation tree on the left side of your screen to edit it.

- **Properties**: you can rename the indicator, change its category, change the type of measure, and add a comment.
- **Fields**: use drag-and-drop to move the field(s) of your choice, one by one, into the list of fields. To remove a field, right-click it, and then click **Delete node**.

Assigning Hierarchies

On the left panel, in the **Hierarchies** folder of a process you can assign hierarchies.

- Select the hierarchy(ies) of your choice from the “All Hierarchies” list and use drag-and-drop to move them, one by one, into the “Assigned Hierarchies” list.

You can remove a hierarchy by right-clicking it, and then click **Delete node**.

- Click the **Save Changes** button.

Assigning Populations

On the left panel, in the **Assignments** folder of a process you can assign persons or populations.

- Select the person(s) / population(s) of your choice in the “All Persons” / “All Populations” list and use drag-and-drop to move them, one by one, into the “Assigned Persons” / “Assigned Population” list.

You can remove a person by right-clicking it, and then click **Delete node**.

- Click the **Save Changes** button.

You can click a specific population in the navigation tree on the left side of your screen to edit it and change the criteria if needed.

- **Properties**: you can rename the population, change the business universe, and define if the population is “fixed” and if the population is “simulated”.
- **Condition**: you select the business objects that define the population. (Refers to **Create a condition** for more details about this step.)
- **Preview**: you can view the list of members in the population, according to the conditions you defined.

Assigning Grids

On the left panel, in the Grids folder of a process you can assign grids.

- Select the grid(s) of your choice in the “All Grids” list and use drag-and-drop to move them, one by one, into the “Assigned Grids” list.

You can remove a grid by right-clicking it, and then click **Delete node**.

- Click the **Save Changes** button. The grid appears in the left panel.

You can click a specific grid in the navigation tree on the left side of your screen to edit it.

Assigning Rules

On the left panel, in the **Rules** folder of a process you can assign rules.

- Select the rule(s) of your choice in the “All Rules” list and use drag-and-drop to move them, one by one, into the ‘Assigned Rules’ list.

You can remove a rule by right-clicking it, and then click **Delete node**.

- Click the **Save Changes** button.

The rule appears in the left panel.

You can click a specific rule in the navigation tree on the left side of your screen to edit it.

Assigning Execution Plans

On the left panel, in the **execution plans** folder of a process you can assign execution plans.

- Select the rule(s) of your choice in the “All Execution Plans” list and use drag-and-drop to move them, one by one, into the ‘Assigned Execution Plans’ list.

You can remove a rule by right-clicking it, and then click **Delete node**.

- Click the **Save Changes** button.

The Execution Plans appears in the left panel.

You can click a specific Execution Plans in the navigation tree on the left side of your screen to edit it.

Creating and Maintaining Process Objects

On the left panel, go to **Administration**.

In this section, beqom solution gives users the tools to define process type indicators, fields, periods and frequencies.

It is also proposed a first version of quota management and budgeting out of process manager with top-down distribution and bottom-up allocation based on rules driven allocation options.

The last point is the Cube management tool to import data into fields of type "import" with filters defined in the indicator.

Process Templates

This feature allows the user to:

- Configure the information column with specific setting
- Define associations that can be used further to filter the process. You can also define cascading associations between filters.
- Make it available for end user to filter data in specific process.
- Set the process as process for individual estimator
- Set crediting structures

To define a template:

- Go to
- DESIGN/Admin
- Select Process Templates
- Click on + to add a new process type

A south panel is opened with three tabs: **Properties**, **Information Fields**, **Crediting Structures**

Go to Properties

- Enter the name
- Select the view among available views (Kernel views)
- Select Activate Estimator Feature if you want to do an individual estimator process.
- Save
- Select the fields you want to configure

Configuring an Information Field and Defining Associations

Go to Information fields

Two tabs appear: **Settings** and **Associations**

- Go to Configuration
- Change the settings of the field: you can add a thousand separator and/or decimal precision

For each information column, you can associate a list of criteria.

- Go to Association
- Select the association you want to do.
- Select the display field (it should be a long_name or short_name)
- Select the value field (which is the id to be considered when filtering)
- Save

Creating Cascading Associations

The purpose is to define setting in such a way that the filter settings of the first filter limit the values that users see in other filters.

For example, a first filter containing countries France, Italy, Turkey and a second filter listing Cities as Paris, Marseille, Milan, Naples, Istanbul, Ankara. When creating a cascading relationship, should you select France then the second filter will only display select Paris, Marseille.

In Associations tab

- Click on **Add**
- Select a field that can participate to a cascade: enter field and id.

NOTE In the database, the creation of these two tables should be designed correctly to have a correct behavior in the application.

Creating a Crediting Structure

- Go to Crediting Structure
- Enter the structure name
- Enter Join Type: select BaseConfig
- Select the criteria to be used
- Save. A popup is opened.
- Select the grid that is referred to
- Select the items to be mapped

You can create additional filter:

- Click on Add New. A new type will appear. Then you can define a second filter.

Defining Indicators

Indicators are associated with process and must be linked to at least one field.

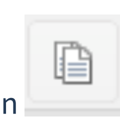
Creating an Indicator

- Click the **Add** button below the list of existing indicators. A form is generated to define the properties of the indicator.
- Fill the fields:
    - **Name** Indicator: enter a name for the indicator.
    - **Category (1/2/3) Indicator**: you can classify the indicator in several categories for optimizing the use of search filters.
    - **Measure**: select the measure you want to associate with the indicator.
    - **Comment**: optional information.
    - Switch to the Fields tab.
- Use drag-and-drop to move the field(s) of your choice, one by one, into the list of fields. To remove a field, right-click and choose "**delete Node**"
- Click the Save Changes.

Editing/Deleting an Indicator

- Click an indicator in the list.
- Click the **Delete** button if you want to delete it, or edit the form and click **Save Changes**.

Coping an Indicator

- Click on the square of the item you want to copy. The copy icon  appears
- Click on copy icon. A popup asks you if you want to save the changes.
- Click Yes. A new item is created with -Copy extension.

NOTE The field assignment to an indicator isn't copied.

Defining Indicator Fields

Fields are used to measure the indicators. A field can be an item in a list, a result, a goal, an imported value, etc. It can be displayed as "%".

Creating a Field

- Click the **Add** button below the list of existing fields. A form is generated to define the properties of the field.
- Fill the fields:
    - **Name**: enter a name for the field.
- **Label Field**: enter a name for the column header of the field.
- **Code Field**: enter a code for the field.
- **Format / Source / Type**: select the format/source/type of the field from the drop-down lists.

Depending on the selected type, additional tabs will appear.

- For **Free** input type, min, max, default tab are displayed to set min, max and default values for this field. They can be set with static value, SQL Field coming from a table or a view or linked to a rule.
- For List type, a new tab called **List** is displayed to enter the values of the list. You can also set a filter in the list based on Payee and/or process Start Date and/or process End Date.

Select the filter in **Filter By**. You can select several criteria for filter. Then the list will be filtered in the grid accordingly with this setting.

NOTE When defining fields with dynamic filters, when exporting in excel, these fields are in READ ONLY.

NOTE Dynamic combo isn't supported.

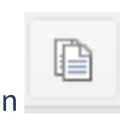
- **Unit**: select the unit that will be used for the field.
- **Decimal Precision**: define the number of decimals displayed for all fields of type "decimal" in grids, forms, processes and information columns.
- **Allow Thousand Separator**: numerical results will be displayed with thousand separators.

- **Use percentage format**: the value will be displayed in % and followed by “%” sign.
- **Show aggregated data**: when this box is checked, a “TOTAL” line, that sums up the values in the field, is displayed at the top of the process grid, on each page.
- **Enable Threshold**: available only when Show aggregated data is activated. When this option is checked, threshold values can be defined for the indicator field.
- **Threshold Maximum Value**: available only when the Enable Threshold box is checked. Upper limit for the threshold.
- **Threshold Minimum Value**: available only when the Enable Threshold box is checked. Lower limit for the threshold.
- **Threshold Comparison Field**: available only when the Enable Threshold box is checked. Reference field for the threshold. For this feature to work properly, the reference field must be included in the same process.
- Click the **Save Changes** button.

Editing/Deleting a Field

- Click a field in the list.
- Click the **Delete** button if you want to delete it, or edit the form and click **Save Changes**.

Copying a Field

- Click on the square of the item you want to copy. The copy icon  appears
- Click on copy icon. A popup asks you if you want to save the changes.
- Click Yes. A new item is created with -Copy extension.

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Crediting Filters

You can copy a crediting Filters

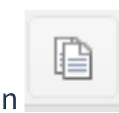
- Click on the square of the item you want to copy. The copy icon  appears
- Click on copy icon. A popup asks you if you want to save the changes.
- Click Yes. A new item is created with -Copy extension.

Territories

This screen allows defining territories for a crediting process.

- Click on +
- Select the cube reference
- Select the dimension
- Select the **Type**: Include or Exclude
- Select **Detail**
- Save

Copying a Territory

- Click on the square of the item you want to copy. The copy icon  appears
- Click on copy icon. A popup asks you if you want to save the changes.
- Click Yes. A new item is created with -Copy extension.

Defining Periods

Periods define the starting and ending dates of processes.

Creating a Period

- Click the **Add** button below the list of existing periods. A new empty row is added at the top of the list.
- Double-click a field to edit it.
- Use the calendar function to define the creation date of the field.

NOTE When the drop-down calendar is displayed, it defaults to the current date if the field is empty. You can click a month to display the list of months and years.

- Click the **Save Changes** button.

Editing/Deleting a Period

- Click a period in the list.
- Click the **Delete** button if you want to delete it, or double-click a field to edit the form and click **Save Changes**.

Tools

Data Operations:

This feature allows manager to distribute data among manager subordinates or sum the data of subordinate payees for their manager using calculated formulas. This allows the setting up of calculated fields which automatically run an assigned formula, and are not editable (with the use of triggers). Multiple formulas can be assigned to multiple fields.

- Click **Data Operations**

A grid appears with two tabs: **Operation** and **Trigger**

Operation Tab

In **Operation** tab, you define the type of operations you want to apply to your data.

- Click **Add** button. A new row is opened in the grid.
- Click on **Name** to edit the field
- Enter a name
- Click **Save** button, click the item on the list. A new form is opened at the bottom.
- Click **Add** button. A new form is opened at the right.
- Fill the fields:
  - **Operation Type**: Select the type of operations
    Top-Down (**DISTRIBUTE**) : Given a manager amount, this amount is distributed to the manager's sub-payees. The level of subordinates can be chosen. If one is chosen, the amount is distributed to the level directly under the manager. If two is chosen, the quota is distributed directly to the payees two levels below the manager, and not to the lower level, and so on.
    Bottom-Up (**SUM**): Subordinate's amounts are sum up a their manager.
    Calculated (**CALCULATE**): Calculates an amount based on a given formula
    EXECUTE: execute a rule for login user, selected payee or selected payee manager.
    PUSHVALUE: Collect default values set for a given field and write them to login user, selected payee or selected payee manager field.

- Select the process the data operations will be applied

NOTE In Calculate Type, indicator and /or information can be used in the formula but the formula should at least contain one indicator to trigger the operation.

For each type, a set of parameters is displayed.

Find below the parameters for SUM:

- **Field** Value: field value to be used
- **Period Value**: defines the period on which the operation will be applied (put 0 to say current period)
- **Relative Period Value**: defines the period of reference that will be used to calculate the amounts (put -1 to say previous period in respect to current period).
- **Relative Field**: field that will be updated
- **Update behavior**: the operation you want to apply: Add, Replace, Subtract
- **Missing Relation**: if a payee is just arriving so he has no previous period to be used to calculate his amount. In that case, a defined amount can be attributed as an equal, a fixed percentage or a fixed amount.

Trigger Tab

This feature allows user to define which trigger an assigned operation will be automatically run on the assigned fields.

- Select Trigger tab. A grid with existing triggers is opened
- Click **Add** button. A new form is opened at the bottom.
- Fill the fields:
  - **Name**: name of the trigger
  - **Type**: Select in drop down list

  On Save user action: After save button is clicked and save operation is finished

  On Validate user action: After validate button is clicked and validate operation is finished

  On Change user action: After data is changed. Currently not supported

  On Click user action: In process grid, it is used to show action in Spread menu (obtain with a right-click on a value).

  - **Process**: which process uses this trigger
  - **Indicator**: which indicator uses this trigger
  - **Field Name**: which value uses this trigger
- Click **Save** button. A new row is created in trigger grid.

NOTE There are some limitations: all operations cannot be triggered by all trigger events

Default Values

Only administrator will access to this feature.

This feature allows user to save default values of a specific field in a process.

Fields with data are defined with default values coming from static value or dynamic values provided by a rule for example.

Up to someone will accept these values; these values remain as Default Values.

Normally to save the default values or change it, the manager should go to the process and save the default values.

This feature allows saving all default values of a specific field for a full process.

- Select a **row**
- Select the date you want that Default values should be applied
- Click Override

NOTE If you select **Delete Existing Record**, the values that have been changed by the manager will be replaced by Default values too.

Frequencies

This feature allows the user to define frequency that can be used in a process. By default, standard frequencies in a process are proposed as weekly, monthly etc.

You can define different frequency patterns.

- Click on **Frequencies**. A grid with all available frequencies is displayed.

Creating a New Frequency

- Click **Add** button. A new row is added to the grid.
- Click on a **Frequency name** and Enter a name.
- Click **Save** button.
- Click on this new Frequency row. A form is opened at the bottom.
- Click on + button
- Fill the fields
    - **Is Included**: define if this custom frequency will be included to the process.
    - **Number of days**: Enter the duration of the frequency in day.
    - **Index**: put 1.
- Click **Save** button

If you want a specific frequency pattern, you can add steps by redoing the above steps.

For example, if you want a pattern with a situation that lasts x days then a gap of y days, you simply need to create two steps: one step with Number of days = x and Is Included is checked then a second step with Number of days = y and Is Included is unchecked. This pattern will be repeated on all the process period.

Deleting a Frequency

- Select a Frequency
- Click **Cancel** button. The Frequency is removed from the frequencies grid.

NOTE In process tab, this new frequency is available into Frequency drop-down list when creating or modifying a process. (See Process COMPONENT).

Rule Engine (RULES Tab)

The RULES tab contains all the rules and execution plans that are available in the application. An authorized user can add, update, execute and delete rules in accordance with the changing compensation criteria and guidelines of the company, and define execution processes (a set of rules to be executed in a certain sequence). The administrator is allowed to review the scope of a rule definition.

Managing Rules and Conditions

In the **Rules** section, you can build the rules by defining their properties and conditions.

Defining Rules

Define Rule Properties

When right-clicking the “Rules” folder, and then clicking **Create Rule,** a form is generated to define the properties of the rule.

- Fill the fields.
    - **Rule ID**: value automatically assigned when the rule is created. A unique ID is assigned for each rule.
    - **Rule Name**: enter a name for the rule. Several rules can have the same name.
    - **Rule Type**: select the compensation process that will be associated with the rule. (budget, values, group, payment, earn).
    - **Rule Category**: select the variable compensation type proposed by the rule (Salary, Stock Options, Commission, Bonus).
    - **Rule Incidence**: select the frequency for the rule results update.
    - **Allocated** Budget: optional information. You can define estimation for the amount that will be allocated to the payees.
    - **Unit**: choose a unit for the budget (point(s), %, N/A, &, €, £).
    - **Transaction Statement**: select the transaction statement (validated, not validated). This statement can then be used in the report to show only validated transactions for example.

- **Comments**: optional information.
- **Data Version**: select the dataset the rule will use.

- Click the **Save** Changes button.

Sharing

The person who created the rule or an administrator can assign rights to a team for a rule.

- In the **Share** tab, click a team in the list. The selected team appears grey.
- Select the rights you want to assign to this team in the "Assign Rights" list: "Modify", "Share", "Print", "Delete", "Read"
- Click the **Save Changes** button.

NOTE You can define a period for the share rights to apply. If no period is defined, these rights will be permanent.

Copying/Renaming/Deleting a Rule

You can make a copy of a rule by right-clicking the rule in the "Rules" folder, and then clicking **Copy**.

All settings will be saved except the Transaction State that will be "not validated".

You can rename a rule by right-clicking the rule, and then enter the new name.

You can delete a rule by right-clicking the rule, and then clicking **Delete**.

When deleting a rule, all its conditions are also deleted.

NOTE A rule that has been associated with an execution plan cannot be deleted, unless the execution plan has already been deleted. It is, however, possible to add new conditions to the rule.

Creating Rule Conditions/Guidelines

You can create conditions for a rule by right-clicking the rule, and then click **Create condition**. A form is generated to define the properties of the condition.

Properties

- Fill the fields.
  - **Condition** ID: value automatically assigned when the condition is created. A unique ID is assigned for each condition.
  - **Condition Name**: enter a name for the condition.
  - **Condition Activated**: activate the condition to use it in calculations.
  - **Start Date**: use the calendar to define the start date for the condition.
  - **End Date**: use the calendar to define the end date for the condition.
  - **Last Calculation Date**: date of the last execution will be displayed in this field.
  - **Business Universe**: select one of the business universes created in the **Admin** tab.
  - **Filter Current User**: optional information. You can choose to apply the condition only on the data of the current user.
  - **Mode**: select calculation type used when launching calculations (**complete**, **incremental**). Complete means that all transactions are calculated at each calculation run while incremental means that only transactions that haven't been calculated at the last calculation run will be calculated.
  - **Group 1,2,3**: select group if available. These groups are set in tables in SQL server.
  - **Comments**: optional information.

NOTE When the drop-down calendar is displayed, it defaults to the current date if the field is empty. You can click a month to display the list of months and years.

- Click the **Save Changes** button.

Criteria

In the **Criteria** tab you select the business objects that will define the criteria of the rule.

You have two ways to define a criterion: By using an advanced mode or by using smart mode (simplified).

Defining a Criterion Using the Advanced Mode

Business objects and Objects values appear in two separate tables.

- Click a business object to display the list of available objects values.
- Use drag-and-drop to insert items that will describe the rule.
- Use the calculator to insert Boolean, comparison, arithmetical, date or time, round functions in your condition. The condition directly appears into the zone below.
- When finished, click the **Test** button to check validity of the condition. A popup will let you know if the condition is valid or not.
- If the condition is invalid, click the **Reset** button to reset the condition you created.
- When the condition is valid, click the **Save** button.

Defining a Criterion Using the Smart Mode

You can use this mode to define your criteria.

- Select Smart Mode by clicking on this icon at the bottom of the window. Two windows appear on the left side: Statements and Phrase.
- Firstly, enter a statement which is a criterion.
- Click **Add**
- Fill the fields:
    - **Name**: give the name of the statement
    - **Field**: select in drop down list the parameter
    - **Operator**: select the operator to be applied on the field
    - **Value**: select the value

      You can enter several statements.

- Secondly, create a phrase which is a statements combination.
- Click **Add**
- Enter the name of the phrase. Do not **Save**.
- Click on statements you want to add to the phrase and click again if you want to remove. At the right bottom, you can select Satisfy All if you want to do a AND or an OR between statements.
- Click **Save**

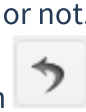
NOTE A message will inform you that if there is an existing criterion, it will be reset.

NOTE You can modify nor the statements nor the phrase once they have been created and saved.

Calculation

In the **Calculation** tab you will define the calculation rule that will apply to the payees who are eligible to the condition already defined under the **Criteria** tab.

Business values and Objects values appear in two separate tables.

- Click a business object to display the list of available objects values.
- Use drag-and-drop to insert items that will describe the rule.
- Use the calculator to insert Boolean, comparison, arithmetical, date or time, round functions in your condition. The condition directly appears into the zone below.
- When finished, click the **Test** button  to check validity of the condition. A popup will let you know if the condition is valid or not.
- If the condition is invalid, click the **Reset** button  to reset the condition you created.
- When the condition is valid, click the **Save** button.

NOTE The Reset button does not undo your last action. It returns to the last saved criteria.

Simulation Data

In the **Simulation data** tab, you select the grids that will be available then in the simulation tab.

On the left is the list of unassigned grids.

On the right is the list of assigned grids.

- Click the grid you want to assign in the right list.
- Use drag-and-drop to move it into the list of assigned grids.
- Click the **Save Changes** button.
- Current assignment is updated.

Then, the grids can be selected in Simulation tab for simulation purpose.

NOTE You can delete an assigned grid by right-clicking it, and then click Delete Node.

Executing Rules

The rules execution can be performed immediately or in background, on one or several populations.

- Select a rule on the left panel
- Click  at the bottom of the panel. A popup is opened with additional settings.
- You can select if the execution will be performed in background.
- Click on Execution in background.
- Select if you want to run the rule on a specific population or on a payee.
- Select the population or the payee to be executed

NOTE You can select several populations but only one payee

- Click on **Execute**

NOTE When the execution is performed in background, you can run several rules at the same time or continue navigating in the application. When the execution is done, it will behave as when you didn't select it.

After the calculations are complete, the execution result is displayed in a pop-up message.

You can retrieve this information in the **Execution Results History** tab.

Execution Plans

An execution plan schedules the launching of calculations for several rules or conditions.

Defining an Execution Plan

- Right-click the **Execution** folder and then click **Create an** execution **plan**. A window with two tabs appears in the middle panel.

Properties

Two grids open in the lower part of screen: **Rule List** on the left, and **Conditions List** on the right.

- Click a rule in **Rule List** to display its condition in **Condition List**.
- Click the condition you want to add into the Execution Plan.
- You can select one by one and **Save** or check the "**Select All**" box to add all conditions. The selected conditions appear grey.
- Click the **Add** button below the Rule List to add the condition(s) into the Execution Plan.
- Repeat these actions for each condition you want to add into the Execution Plan.

The Execution Plan is displayed in the upper part of the screen.

You use drag-and-drop to reorder the **schedule order**. You notice that the number in scheduler order is changing when you move the rules.

You can remove a condition from the execution plan by clicking it, and then clicking the **Delete** button.

- Click the **Start Calculations** button  to execute rules and conditions in the defined order. The last calculation date is displayed in the upper right corner.

Sharing

The person who created the execution plan or an administrator can assign rights to a team for it.

- Click a team in the list. The selected team appears grey.
- Select the rights you want to assign to this team in the “Assign Rights” list: View, Edit, Delete…
- Click the **Save Changes** button.

NOTE You can define a period for the share rights to apply. If no period is defined, these rights will be permanent.

Data Manager (DATA Tab)

The DATA tab contains all the data grids that are available in the application. This tab is used to manage data in the grids and import/export files in the database through two tabs – Grids and Administration. Grids contain parameters data that is consumed used by rules and to support processes, e.g. to set central guidelines (such as salary/bonus splits).

Managing Grid Data (Grids Section)

In the **Grids** section you can manage available grids, as well as export and import data.

Viewing a Grid

- Open the **Grids** folder, and then open the folder corresponding to the process of your choice to view available grids for this process.
- Click the grid you want to view. The grid is loaded. The user can set specific view for the grid and it will be saved. All fields that are editable are shown with a back border.

For each grid the user can set:

- A filter selection
- A column order
- A column sorting (per column)
- A column custom sorting (several columns)
- A number of rows per page selection
- Columns hidden/shown

Every time that a user opens a grid the system has to control if there is saved settings for that specific grid for that user and shows the grid as when he left it last time s/he used it.

When user has his own view in use, he can see it from the state of the new “settings” -button:

In DATA/GRIDS,

- Select a grid

For each grid, a "settings"- button is shown on the top right corner of the grid.

When user specific grid view is in use, the button icon has blue style

When default grid view is in use, the button icon has grey style

To Reset to the default grid view

- Click the button
- Click on the link "**Reset to default View**". User's grid view is removed and the default grid view will be shown

Defining a Filter Selection

- You can use filters to view specific data. According to the type of the column, the filter options change.
- Enter a value in the top of the column. The filter is automatically set to Contains.
- Click on the icon if you want to change the type of filtering. The rows that fit the filter selection are displayed in the grid.

NOTE When a filter option is selected, the column header field becomes blue.

NOTE To remove a value selection, click on the cross, the filter selection remains but the data in the grid aren't filtered.

To remove a filter:

- Click on the icon
- Click on No Filter

NOTE Use the arrows at the bottom of the page to navigate from the different pages of the grid.

Defining Column Order

- Drag and drop the header of column. The column is moved.

Defining Column Sorting (Per Column)

- Mouse-hover the column header
- Click once: Ascending is applied
- Click once: Descending is applied
- Click once: Sort reset is applied

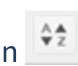
NOTE The column should have been set as sortable when the grid has been created.

Defining a Custom Column Sort Order (Several Columns)

Custom Sort allows sorting a grid on more than one column at the same time.

NOTE You should have at least one sortable column in the grid to see this icon.

In DATA/GRIDS

- Select a grid. For each grid, a “Custom Sort”- button  is shown on the top right corner of the grid.
- When user has set custom sort on some column(s), the button icon has blue style
- When there is no custom sort set, the button icon has grey style
- When none of the column is sortable, the button icon is not displayed

To set custom sort order:

- Click the “Custom Sort” - button
- Click “+” button
- Edit the column name and sorting order in the grid, double click to set the focus on the field
    - Click Add to add more columns
- Click “Save” button. The Grid is sorted with the custom sort criteria.

To delete one custom sort order definition:

- Click the “custom sort” - button
- Choose the column you want to delete. Click “Delete” button
- The column is no longer shown in the sorting criteria
- Click “Save” button. The Grid is sorted with the custom sort criteria, without deleted definition.

To delete all custom sort order definitions:

- Click the “custom sort” - button
- Click “Reset” button. The Grid is sorted in its default sorting order

NOTE Note: If clicking the sort in column header, the custom sort will be removed and the grid sorted only by selected column. **Reset To Default View** removes sort settings.

Defining Page Size

The number of rows per page (page size) can be configurable:

In DATA/GRIDS,

- On the right bottom corner of the grid, choose the page size option from the options in the drop-down list

NOTE User can also edit the value to personalize the page size

The grid is reloaded and selected number of rows is displayed per page. The value is automatically saved in user’s grid view so that s/he will see the same the next time when using the grid.

The default page is defined per grid.

In DATA/ADMINISTRATION/Grid Editor

- Select a Grid
- Select Properties
- Page size is a dropdown list. The drop down list has by default 3 options (10, 25, 50) and it is editable list so the user can add a value. Choose one value. The default page size for the grid is set to selected value.

Displaying/Hiding Columns

- Mouse-hover the column header
- Click on the arrow
- Mouse-hover: select a column
- Uncheck the columns you want to hide

Performing a Search in Hierarchical List

If in the grid, there is such control. A search is available.

When starting to search in control, when entering the first or/and second characters you need to type **Enter** to get the result. The tree is expanded to show the results.

If the number of results is bigger than Maximum Tree Search, then an information message is displayed and the user needs to add characters to reduce the search area.

If you enter more than 2 characters, then the search is automatically launched after half a second and the results are displayed with the same constraints to be less than Maximum Tree Search.

If the searched word doesn't match any items in the control list, an information message is displayed.

Using the Bulk Apply

- Mouse-hover the column header
- Click on the arrow
- Click on **Bulk Apply** (this option isn't by default, see ADMINISTRATION/Grid Editor section). A new pop-up is opened.
- Enter the value you want to propagate
- Select if you want on the current page or on all pages
- Save. The value is propagated in all rows.

NOTE The Bulk apply is available for all grids as production, staging, simulation and for Boolean, String, Numeric, Date and drop-down list fields. The Bulk apply is not available for hierarchical grid. The Bulk Apply is not available in case of grid based on a view. The Bulk Apply is not available for tree combo box control.

Adding/Editing Grid Data

When clicking a grid in the navigation tree, all grid data is loaded. According to your permissions you can add and edit grid data.

- Click the **Add** button below the grid to add a row into the grid. An empty row is added at the top of the grid.
- Double-click a field to make it editable and use drop-down lists to enter data.

You can use the **Export** and **Import** buttons to change grid data in an Excel file and then import the modified grid.

- Click the **Save** button.

NOTE As you have not saved, you can return to the previous saved state by clicking the Refresh button.

The system provides a warning pop up every time that the user makes some changes in one page in the data grid and after he wants to change the filter or order or moves to another page of the data grid. The purpose is to prevent losing data.

The user is warned before:

- Change grid page
- Filter
- Order
- Reset
- Change page size
- Refresh

NOTE This feature is applied to any grids including simulation grids, staging grids etc...

Exporting/Importing Data

When clicking a grid in the navigation tree, all grid data is loaded.

- Click the **Export** button below the grid to export the entire grid in an Excel file. As long as the export process is running, a status pop-up window is displayed on screen, and indicates you when the process is done.
- Make the modifications you want in the Excel file.
- Click the **Import** button below the grid. A “File Selector” popup appears.
- Click the **Browse** popup to choose the file you want to import.
- Click the **Upload** button. New data is imported into the grid.

A popup with results is displayed with some information on what happens on the grid when importing the excel file:

- Total Rows : Total of rows in the excel file.
- Skipped : Number of rows that haven’t changed.
- Modified Count : Difference of total rows number between grid and excel file.
- Committed : Total number of insert and delete rows in the grid
- Inserted : Number of rows that have been inserted in the grid.
- Deleted : Number of rows that have been deleted in the grid.
- Errors : Number of rows that can’t be found in the grid although they were in the excel file. It may happen if someone deletes some rows in the grid before importing again.

Deleting Data

When clicking a grid in the navigation tree, all grid data is loaded.

- Click the row you want to delete in the grid. The selected row appears grey.
- Click the Delete button below the grid. The row is deleted from the grid with its data.
- Click the **Save Changes** button.

NOTE As you have not saved, you can return to the previous saved state – if you delete a row by mistake for example - by clicking the Refresh button.

Managing Relations

If a relation has been defined for this grid (in Administration section/Grid Relation), you can manage these relations:

- Right-click on a row and choose **Manage Relation**. A form is displayed in the lower part.
- Drag and drop Not Assigned items to the current part.
- Click Save button. A new relation is created in the grid.

To remove a relation, right-click on a relation and select **Delete**.

NOTE If there are several related grids associated to the same grid, when doing Manage Relation, there will be several tabs in the form

Creating Grid Folders

You can create new folders and subfolders to organize grids.

- Right-click a process folder, and then click **Create**. The new folder is added just below the process folder.
- Right-click the folder to rename it or delete it.
- Use drag-and-drop to move grids into the folder or subfolder.

Attaching Objects to a Grid

You need to select a grid that has attached object.

- Click on a row The attached object is opened in the bottom part.

You can change the value into the attached object and depending on refresh options (See Grid Editor/ Attached Objects), on saving, the main grid will be updated.

Grid with Hierarchical Layout

When a grid has a hierarchical layout,

- Double-click to expand the node

NOTE On such grid, there is no search.

Grid with Hierarchy Assignment Security

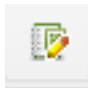
If someone delegates you a grid, then you may have access to different data views for this grid.

- Select the grid with hierarchy assignment security. A drop-down list appears on the top (if Show Default view or several security views have been defined for you)
- Select the view you want to access

If you select default view, there is no hierarchy security applied nor object security if none is defined.

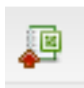
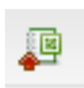
If you select defined view, you will see as the delegator if Object Security filters aren’t checked in grid configuration.

Grid with Template Ability

When a grid has this icon , then you can download or upload a template grid.

When exporting by using this feature, the excel file won't contain any data and any macro, only headers.

When importing a template:

- Click on  as for a standard grid import. A popup is opened
- Select the file you want to import by clicking on **Browse**
- Then click on **Upload.** A popup is opened to do the mapping between excel file column and grid column.
- Click on a name column in source and select among available column in the excel file
- Click on a name column in Destination column to map with.
- Click on  . A popup with result of the export is displayed. The grid is updated.

Grid with Data Control via Staging Area

The purpose is to control the data that are uploaded in the system by using a staging area.

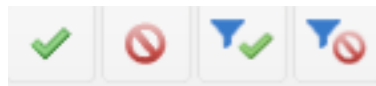
This feature proposes options to accept, reject uploaded data and correct errors.

A grid with such capability has an additional tab called **Staging Area**.

- Select your grid. A new tab with **Staging Area** is displayed.
- Click on this tab and three new are added: **Review**, **Import History**, **Publish History**.

Review

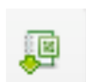
In this area and depending on your access rights, you can modify the data if data are editable or delete rows 

You can also validate or invalidate  and then publish in production.

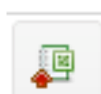
NOTE Permissions for staging area can be defined in Admin/profiles

You can also export the production data in excel and modify them then upload.

Go to **Production** tab

- Click on excel export  . The excel file is opened.

You can modify, add rows the excel file depending on access rights.

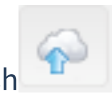
- Save the excel file
- Click on Import  . A popup is opened.
- Click on Browse and Select the excel file you want to import
- Click on Upload
- The mapping columns between the excel source and the destination is displayed.
- If the mapping is correct, click on  at the bottom. The data will go into staging area.

NOTE If new data are not correct, it will be notified in staging grid in Error Status Column. If there is data security applied on the grid, it will also be applied in staging

beqom.

Publishing Data

NOTE Note: only validated data can be published.

- Click on Publish  . A popup will ask you if you want to replace or append the existing data.
- Click on Publish  . The production grid will be updated.

NOTE When publishing, the rows with errors won't be published in production and will remain in staging area.

Import History

In this tab, all imports are recorded. So, you can know who imported what, how many records can't be imported etc.

Publish History

In this tab, all published are recorded. So, you can know who has published what, etc...

NOTE Staging area is used for any upload type: production or template.

Grid with Actions to be Executed

If a grid has this icon  that means that some actions have been configured.

- Select a row
- Click on this icon. A new popup is displayed.
- Select the **Actions** you want to execute.

NOTE A help is available with the description of the action. Click on ? to display it.

- Select the parameters if any are required
- Click on Save and Execute button. A popup is opened with the execution results.

NOTE The User Interface does not support the actions configuration. For more information, please contact beqom support.

Grid with Cascading Fields

Some grids may contain cascading fields. A typical example is two fields as country and city and depending on the country selection, the cities list in city field is different.

To use a grid with cascading fields:

- Go to Grids
- Select the grid with cascading fields
- Click on a field (country)
- Select a value

NOTE Click on field (city). Then the city list is filtered based on country.

NOTE The configuration of cascading fields is done in Administration/Grid Editors

Grid with Condition Validation

Some grids may have condition validation that means that if the values you enter are not fitting the condition then you will be informed and may be blocked to save.

All this setting is set in Administration/Grid Editor.

Administration

In the **Administration** section you can export selected data from tables that are available in the application, and you can import files for inserting or updating data.

Importing/Exporting Data

In the **Administration** section you can export selected data from tables that are available in the application, and you can import files for inserting or updating data.

Exporting Tables

When clicking the **Import Export** button in the navigation tree, the “Export” form is displayed. You can select table’s data you want to export.

- Enter a name for the generated file into the “File Name” field.
- Use the drop-down list to choose the source table you want to export in the “Source Table Name” field. All fields available for this table are displayed into the grid below.
- Select the rows corresponding to the fields you want to export. You can check the box in the header to select all rows. The selected rows appear grey.
- Click the **Export** button below the grid. All selected data are exported to an Excel file.

Exporting Template Data

When clicking the **Import Export** button in the navigation tree, the “Export” form is displayed. You can export selected fields from source tables to create templates.

- Enter a name for the generated file into the “File Name” field.
- Use the drop-down list to choose the source table you want to export in the “Source Table Name” field. All fields available for this table are displayed into the grid below.
- Select the rows corresponding to the fields you want to export the headers. You can check the box in the header to select all rows. The selected rows appear grey.
- Click the **Export Template** button below the grid. The headers of the selected fields will be exported as a template.

NOTE When clicking the Export Template button, no data will be exported. This option only exports a table structure that you will then use to enter new data.

Importing Data

When clicking the **Import Export** button in the navigation tree, the “Export” form is displayed. You can switch to the **Import** tab to import documents.

- Click the **Browse** button to select the document to upload.
- Click the **Import** button at the bottom of the screen.

Grid Editor

Forms and grids are user access interfaces to the created tables as well as the beqom solution standard tables. All program input interfaces are based on grids and forms. They enable you to define parameters that will be used in the various steps of each process.

In the Grid Editor section, you can edit forms and grids.

A form contains fields that can be information, labels and is more convenient for individual process while a grid contains rows and columns and is more convenient for processes that are dedicated to massive population.

Viewing/Editing Grid Data

When clicking **Grid Editor** in **Administration**, the list of existing grids is displayed.

- Select a grid in the list to view its properties and the permissions linked to this grid. Search fields are helping you to filter data and find a specific grid.

NOTE To return to the list of grids, you have to empty the research field by clicking the blue cross that appears when you pass the cursor over a field.

Creating a Grid

- Click the **Add** button at the bottom of the list. A form is generated to define the **properties** of the grid.
- Define basic settings and set the permissions for this grid.
- **Basic Settings:** you define the grid name, the table/view of the grid, the type of the grid (measure, repository, kernel) and the page size.
  You can define a hierarchy layout, to enter data for a payee in a hierarchical structure for example.
- Click on Hierarchical Layout. Then 3 new fields appear below
- Select the **master column** among available columns

NOTE This column contains expand collapse buttons. It should be the first column of the grid and should not be empty and should not be editable, draggable.

- Select the **Parent column** among available columns
- Select the **Child column** among available columns
  - **Permissions:** you can allow user to delete row, add new rows, export grid to Excel, import Excel to grid, upload templates for grids (**Allow user to export a template to excel setting**) and set a staging area for a grid to control data (**Use staging area for all imports**)

NOTE Only table has full permissions options. A view has restricted permissions options. When saving a view, if you don't set a column as unique key (**Is unique** setting) in Admin/synchronization, then you will have an error message.

You can also set: auto resizing for grid fields or allow grid to fit screen.

- **Auto resizing** for grid fields: option that puts the same size automatically to each column. If disable, you can set the column size one by one.
- ***Allow grid to fit screen***: option that forces the grid to fit the screen. If disable, a grid width field appears to set the size.

You can also set header Wrapping and Tooltip.

- **Wrap column header:** enable "wrap text" for column header, where the column width can be smaller and the text is shown over 2 or 3 lines rather than only have the option to show a 1 line description making the screen very wide with long descriptions.
- **Enable column header tooltip**: display the full header content on mouseover

- After setting parameters click the **Save Changes** button.

NOTE If the Table/View has been changed and you switch to column tab, a specific warning is displayed for saving this change. If you don't click Save Changes button for any other change and switch to columns tab, no warning is displayed.

- Save. The grid is created and added to the list.
- Switch to the **Columns** tab.
- Check the boxes for the columns you want to add into the grid.
- Click each field, one by one.

For each field 3 tabs are displayed: Configurations, Associations and Filters.

Configurations Tab

This tab allows defining settings for this field.

- **Field** name: defines the header of the column in the grid.
- **Decimal precision**: defines the number of decimals that will be displayed.
- **Sort Order**: this option allows selecting in which order the sort will be performed. If a column has sort Order = 1, the grid will be sort by ascending order of this column.
- **Align Column**: this option allows aligning data in the cell on left, right or center.
- **Size Type**: this option defines if the size will be fixed or flexible.
- If fixed, the width will be requested.
- If flexible, the portion occupied by this column will be requested: the final value of this portion will be defined as a ratio = (specified portion divided by the sum of portion for all columns) * remaining available size (excluding columns with fixed size).

- **Groupable**: this option groups the fields that have the same values under a tab.
- **Editable**: this option allows editing the table by clicking on its header.
- **Sortable**: this option allows sorting the table by clicking on its header.
- **Bulk Apply**: this option allows to set the same value for all rows.
- **Thousand Separator**: specifies the character that separates thousands.
- **Enable Row Validation**: enables setting a row (a record) non-editable after it has been approved in Data Grids. Only 1 column is allowed to be used row validation in a grid. That column must be included in the grid. It is not applied on staging grid, nor on simulation grid.

Associations Tab

This tab allows configuring different type of control for a drop-down list field.

Drop-down List

Multiple Select Drop-down List

Hierarchical List

Multiple Select Hierarchical List

- **Type**: select control type
- **Source**: defines the source table/view of the list among the items synchronized in the repository of tables of the application.
- **Display Field**: defines the column from the data source that will serve as the text displayed for the drop-down list items.
- **Value Field**: defines the column from the data source that will serve as the value for each item of the list.

If you select a hierarchical control then an additional field is displayed: Parent Field

- **Parent Field**: select the field that will serve as Parent to create the hierarchical relation

NOTE In excel, multi selection and tree controls aren't supported in this release. Such field will be in Read-Only in excel.

If you want to have a specific sort in your control, you can set in Admin/Technical/synchronization.

- Select the column that will be used for the sort.
- Set as Sort as 1
- Select the direction: Ascending or Descending.

NOTE If there is a sort already defined in Grid editor for the grid used in associations, it will override the sort in synchronization.

If you have selected_Drop-down List or Hierarchical List then you can add cascading Associations.

In Cascading Associations section,

For example, when creating association on city field,

- Click Add
- Select field name (field in the main grid: country) and Source (field in the association grid: country)
- Save And Preview

Then when user selects a country, the association on city will be filtered accordingly with country selection.

NOTE The cascading fields aren't supported in excel offline. Such field will be in Read Only in Excel

Filters Tab

This feature allows restricting data display following the user attributes.

For each field, you can define a filter depending on user attributes so that all users will not see all data in the grid but only the data that are needed to be shown. A typical example is to show sales amount depending on which country the user is belonging to.

To do so, you should have in the grid a column containing a field that is part of user attributes and which you can apply a filter on.

- **Filter Field**: defines the filter that will be used in the grid.

- **Clear Filter**: Reset the value.
  - Click the **Save Changes** button.

You can preview the new columns added into the grid by clicking **Preview**.

Then you can switch to **Condition Validation Tab**

This feature allows setting conditional data validation on data entry in Data Grid fields like into the Process.

User can **ONLY** add conditional validation on selected grid fields.

With this feature the administrator can configure specific controls per fields:

- Prevent / allow save (Hard and Soft validation)
- Highlight text in a specific color
- Change background / border line of input cell
- Show (or not) a popup with a specific message (with localization)

NOTE **Note:** Conditions can also be based on fields in the table that are not visible (not selected or are hidden) for the Data Grid.

- Go to Grid Editor
- Create a grid with fields
- Go to Condition Validation tab
- Click on the field row you want to add a condition
- Click on **Add To** to add a field to the condition
- Go to Action when False Tab
- Set if it is hard (**Do not Allow saving**) or soft validation (**Allow saving**)
- Set if you want to display a message: Show warning message
- Set the message you want to see displayed

NOTE You can also have this message on change by checking **Show warning on change**.

- Set the layout of the cell
- Go to Action when True Tab
- Set the layout of the cell when the condition is true
- Save

Then, open the grid and enter a value, the setting of condition validation is applied depending on the condition result.

NOTE Some field types aren't supported to have a condition validation

Data Type	Can create a condition validation	Is Supported into a condition validation (Add To)	Value Format	Supported Operations
Int, bigint, tinyint	Yes	Yes		>, >=,<,<=,==,!=
Nvarchar, varchar, char	No	Yes	'Text'	==,!=
Float, decimal, numeric	Yes	Yes	'4.56' with dot for decimal precision and no thousand separator	>, >=,<,<=,==,!=
Datetime, time, date	No	Yes	The ISO 8601 syntax ('YYYY-MM-DD') ISO dates can be written with added hours, minutes, and seconds ('YYYY-MM-DDTHH:MM:SSZ')	>, >=,<,<=,==,!=

- Environment Management isn't able to transfer the conditional validation setting.

Then you can switch to **Security Tab**

This tab allows applying the hierarchy security on the grid.

For example, if a manager needs to delegate some grids to his/her assistant during his vacations, he can use this feature to give access.

First it is required to define a hierarchy security assignment (see ORG/Administration/Hierarchy Security)

- Go to Security tab
- Click on +. A south panel screen is opened
- Enter the View Name
- Select Hierarchy Security in View Type
- Select Start Date and End date

NOTE If these date fields are empty, the hierarchy security will be applied forever.

- Check Include Selected Node if you want to give the delegator node access to the delegate
- Check Object Security filters if you want to apply object security also on the delegation
- Click on +. A popup is opened
- Select the hierarchy security assignment you want to apply
- Click on 
- Save

Defining Permissions

You can change permissions for any access you give.

When defining hierarchy security,

- Select Permission tab
- Select the permissions that will override by default permissions.

It can be done also for object security.

- Select Object security in View Type
- Click on + . A popup is opened
- Select the profile
- Select the user among users that have this profile
- Click on +
- Save

When the user opens the grid, his/her permissions could have been extended or restricted.

Then you can switch to **Advanced Tab**

The purpose of this tab is to set custom procedures that are executed on specific actions on the grid:

- **Before** Save: Check integrity of data input.
- **After Saving / validation**: trigger a specific treatment when data are saved.
- **Before Delete**: Check if the item that the user wants to delete is allowed.
- **After Delete**: In case of deletion, we should be able to identify the impacted areas and treat them based on business rules.
- **Before add**: The addition of new item could be conditioned by some rules (e.g. if the record is added, the type column should always have a specific value...)
- **After add**: The addition of a column accepted could trigger some check controls and / or actions on other areas.

To set a procedure,

- Click on **Advanced**
- Click on **before Add** in Add section for example
- Select among available procedure
- Redo for different actions if needed.

NOTE You can select **Allow batch operation**: in that case, if one procedure fails, none change will be saved.

Then you can switch to **Attached Objects Tab**

This tab will appear only if you have checked in **Properties** tab: **Use attached objects**

This tab allows user to configure a data-grid to show a form or grid in the bottom half of the data-grid screen, i.e. below the data-grid.

- Select **Attached Objects**
- Drag and drop the grid or form you want to attach to the main grid among available objects on the right of the screen.
- Click on the selected/child grid/. A bottom panel is opened
- Enter the properties of the object:
    - Tab Name
    - Parent Grid Refresh: there are three options here

    Refresh All: when saving values in attached object, all the main grid will be updated and the focus will be lost.

    Refresh Selected: when saving values in attached objects, only the selected row in the main grid will be updated and focus remains on the row.

    None: when saving, the main grid is not refreshed. It needs to be done manually by clicking on 

- Select the mapping
    - Click on the Grid Table Columns drop-down list to select the column(s) you want to map with the object table columns.

NOTE A preview is shown at the bottom: Preview Edit Tab and if there are several attached objects, you can move to reorder them. Click on a tab and move it.

- Save

NOTE When a grid has attached objects, this grid becomes Read Only Child grids for grids are not supported in Simulation.

Customizing a Grid Layout

In **Preview**, you can move the columns with a drag and drop.

Then you can save.

The layout modifications are saved and available in the grid.

Deleting a Grid

- Select a grid in the list.
- Click the **Delete** button.

The grid is deleted and no longer appears in the list.

Grid Relation

This feature allows user to create relation between two grids. To do so, you need to define the base grid and the related grid and the item in related grid you want to link to the base grid.

NOTE There is a more advanced mode in SQL server in which you can directly define a custom mapping.

Form Editor

In this section, a wizard driven form generator is available to create basic forms in an easy way.

On the left panel, select Form editor.

A grid with existing forms is displayed.

Creating or Editing a Form

- Click **Add** button. A form with two steps appears: Properties and Design:
- Fill the fields:
    - Name: name of the form
    - **Table View Name**: select among tables.
- Click **Save** button
- Click **Next** at the right corner of the screen. A new form appears related to **Design** step.

In this part, you can design and preview your form.

A form is composed by containers and in container, by fields.

- Click on  at the right side. Then a pop-up with container size is displayed 

.
- Select the number of containers you want. Then containers are displayed with 4 icons: 
- Click on the first icon  to access the properties.

A set of properties is displayed on the right side of the screen in the **Properties Selection**.

Fill the fields and observe the modifications instantaneously in the container

You have different control types available as Drop-down List, Multiple Select Drop-down List, Hierarchical List, Multiple Select Hierarchical List.

If you select a hierarchical list control then an additional field needs to be filled: **Parent Field** that will serve as Parent to create the hierarchical relation.

- Click on the icon  **Add** to add a field. Then a new field is created inside the container with two icons shown when the line is selected 
- Select the first one to access the field properties and fill the fields in **Properties Selection**. The modifications are visible instantaneously.
- Click **Save.** The form is created and added to the list of forms.

NOTE The red cross icon is used to delete a container or a field.

Deleting a Form

From the list of forms, click a row with the form you want to delete and click **Delete** button at the top.

Info Hub (INFO HUB Tab)

The Info Hub has three main features:

- show what you have recently received as tasks, notifications, documents and reports recently into Info box section.
- show documents that you have created or that people share with you into documents Library and documents hierarchy view sections
- set-up notifications, tasks, documents and reports adapted to each type of compensation process, and send them via email and/or push them to the users info box.

There is a quick access to this component if it is available on the top right panel representing by a bell.

Info Inbox

In this section, we will describe the content of the four boxes: Notifications, Tasks, Documents and Analysis and quick access on top right icon (bell).

Accessing Quickly the Info Inbox

- on mouse-over on Info Icon (bell)

A drop-down menu is shown with the list of all new info items to which user has access to.

You can get an overview of new tasks, notifications, reports and documents and also see the details of these items. Where there are more than one item in the inbox you can browse through them using the left-right arrow icons.

For documents, the numbers of ‘New’ and ‘To Review’ items are shown. You should click on the item title to view the item details.

You can navigate to the Info Hub Inbox to see all info items

- Select **Show All** to see related info items in Info Hub.

You will be redirected to the Info Hub component/Info inbox.

Accessing Notifications

Notifications inform users about actions that have been taken such as: data validation, rule execution, start/end of a process, etc.

Use the arrows for a rapid view of the titles of the latest notifications you received.

- Click **Read** to open the last notification you received and view its detail.
- Click **Show All** to open the history of your notifications. You can access the step related to a notification by opening the notification and then clicking the **View** button in the detail view.

NOTE You can set a read notification as “Unread” by right-clicking the notification, and then clicking Set as unread.

You can remove one or several notifications from the list.

A delete button is accessible at the bottom left (if there are some notifications). And a check box in front of each notification is present.

NOTE The deleted notifications are only deleted in the UI. The delete button is only implemented for notifications.

Accessing Tasks

Tasks inform users about actions that need to be performed to complete a process.

Each user can view his own tasks with the current progress for each one, and access them.

Use the arrows for a rapid view of the titles of your tasks.

- Click **Show** to view your last task, and click the task to view its detail.
- Click **Show All** to open the list of your tasks.

You can access a task in the application by opening it, and then clicking **View** in the detail view.

Accessing Analyses

Analysis allows a user to view the list of recently published reports, and quick access to them.

- Click on Analysis icon on the user panel on the left
- Click on a report
- Click on **Open.** A popup is opened
- Click on Show. The report is displayed.

Accessing Documents

Documents include all types of business documents provided centrally to outline common or individual goals and objectives, annual budget reports, operational documents, guidelines, etc.

These documents can be common to all payees, populations or individuals.

Use the arrows for a rapid view of the titles of your documents.

- Click **Show All** to open the list of your documents.
- Select a document. You can download, preview (for pdf only) document, accept and reject documents by clicking on the icons
- Click "View in Document Library". You will be redirected to Info Hub/Document Library to relevant section (New to To Review)
- Click "View Documents List" You will be redirected to " Info Hub Document Library's "Document List view".

NOTE Once a document is seen or reviewed, or once the availability date has expired, it will no longer be shown in these lists. It will still be available in the 'Documents List view'.

NOTE The document box is only visible on the home page if user has permissions to access document box AND documents (Info Hub Inbox/ Documents, Info Hub/ Document Library), AND it has been chosen to be displayed for the home page boxes (see Home Page Management)

For some documents, user actions are requested such as approve or reject.

- Click on the document you want to open. If these buttons  are shown, actions are expected from you:
- Click on the available buttons. A second popup will ask you for confirmation.

NOTE You can also add a comment. This comment is only visible for you and is logged in History grid in INFO HUB.

Documents View

You can visit the document library to retrieve or view your documents and the documents that have been shared with you.

If you want to have a view per payee, you can select Hierarchy documents view.

Each time you set-up a document in **Communication workbench**, the document is stored in the document library of every payee belonging to the population you had specified.

Document Library

- Select **Document Library** on the left panel
- Click on 'Document List' view. In the center panel, you can now see all the documents (shared with the payee) in all folders
- Click on 'New'. In the center panel you will now see a filtered list in the **Document List** view displaying only previously unseen documents

NOTE Once a document is seen it will no longer be shown in this list.

- Click on "**To Review"**

In the center panel, you can now see a filtered list in the **Document List** view with only un-reviewed documents

NOTE Once a document has been reviewed it will no longer be shown in this list. It can then be found in "**Document List**" view.

There is also the document folder view, documents shown in the folder structure:

- Select a folder in left menu tree

NOTE In the folder view the selection in left free impacts the folder filter: only available sub folders are shown

NOTE There is a specific permission that can be given into profile definition to allow user to access to all documents even not shared. (see Admin/Profile/Info Hub select **Read Admin All Documents View** to assign this right). Then with this permission, on the right side, there is a drop-down list to switch between **My Documents** that show only documents that is shared to me and **Admin View** that are all even not shared.

Document Hierarchy View

- Select Hierarchy **View** on the left panel
- Select a payee in the hierarchy. In the center panel, you will see all of your documents and status of the review for this payee.

Document Details

For documents belonging to a document approval process there are icons available.

- Select the button : accept or reject. Then the new status will be set.

You can download the document by clicking on

For each document, you access to a follow up information:

Document status by hierarchy:

- Click on icon:
- Select the hierarchy tree. A pop-up is opened.
- See what the status is for each payee in the hierarchy you selected. You can search for a specific payee

- Type name you are looking for in the search field. The hierarchy is expanded to every node that contains these characters and these nodes are highlighted with red color.

NOTE If you know the full name, the search provides the status of the document directly.

History:

- Click on icon: .A table is opened with all actions that you have performed on this document.

You can also add a comment on the document.

- Click on the icon:
- Put a comment
- Click on **Save**.

NOTE A new profile level has been introduced in the Document Library. A user with this profile is able to see all documents that have been published and not only the ones that have been addressed to him. Any documents where the user is not the recipient are displayed in blue. Go to Administration component/Functional/Profiles to enable this permission. Then a button **Show/Hide All** will appear at the top.

Search and Filters

In the ‘**Document** list view’ in the center panel, there is a set of filters that enables a payee to easily find documents that require actions such as To Review, and for manager to follow up or approve etc.

The filter types are:

- Search by document title, file name
- Filter by folder, approval status, approval date, creation date
- Folder filter: when selecting a folder, the list shows all the documents in the selected folder but not subfolders or documents within the sub folders. If nothing is selected the view will default to show all the available documents
- Sort by document title, file name, folder, approval status, approval date, creation date

NOTE Note that the document folder selection in the left-hand menu impacts the folder filter options in the content pane: options in the folder filter will only show if sub folders are available.

Communication Workbench

This section is used to generate notifications to send to selected users about specific activities in the system.

Three types of activities have been defined: notifications, tasks and documents.

For any activities, you can specify in a notification:

When to send the notification based on the type of triggering event.

Who receives the notification.

What content is in the notification.

Two types of reception are proposed: in landing page or/and at email address that is linked to a payee.

If you use the email notifications, the application provides you a way to send these emails immediately or at scheduled times. To do at scheduled times, you need to schedule sending email messages in Scheduler (Admin tab/Functional Admin/Scheduler). In addition, you can use the notification aggregation feature to aggregate more notifications (email & system notification) based on Trigger Event into only one notification during a specific amount of time.

If you use report subscription, the application provides you a way to mass generated reports into Zip File and to send this Zip file to a dedicated person or group of persons.

Configuring Notifications

Notifications inform users of some actions the application has taken, according to the parameters defined by the administrator: data validation, executing a rule, start of a process, etc.

Under the Notification folder, you have access to all notifications previously created.

Creating a Notification

- Select the Notifications folder and right-click to access to a pop-up menu.
- Click on **Create a notification**.
- Into the form, use the drop-down list to select a trigger. You can set up notifications for:
    - Validation (mass validation) or invalidation (mass invalidation) of a workflow step of a process: select **Process** in the trigger.
    - Execution of a rule: select **Rule** in the trigger.
    - Schedule: select **Schedule** in the trigger.
    - Transfer in a hierarchy: select **Hierarchy** in the trigger.
    - Execution of a simulation: select **Simulation** in the trigger.
- Use the drop-down list to select the trigger event.
- Use the calendar popup to define the Begin Date and the End Date for the notification.

NOTE When the drop-down calendar is displayed, it defaults to the current date if the field is empty. You can click a month to display the list of months and years.

When setting a notification for a Process, you have to select a Process Name, a Process Period and a Workflow Step.

- Click the **To** button and then choose the recipient of the mail.

NOTE When it is for notifications on process, in To list, steps of process are listed. If you select step1 then the owner of step1 (current manager) will receive the notifications. If you select step 2 then the owner of step2 (following manager) will receive and so one. Different notifications for different step owners for same step are possible.

- Enter a subject for the notification.
- Compose the mail by using variables available in the right part of the screen.
- Check **Use translation** if you want to manage translation content for all supported languages.
- Check the box "**Send as Email**" in the right side of the screen if you want to send the email. If the box is unchecked, no Email will be sent, and notification will appear only in the Landing page.

Within the right-hand pane you can define if an email will be sent (if not selected, the notification will be in the Notifications box only).

Then you can select if you want to have notifications aggregation.

- Select Aggregation Period:
    - No Aggregation: The notification will be received each time the action is performed
    - An aggregation period previously defined in the Admin/Scheduler
- Check the option "**Save As Template**" if you want to add this notification and its parameters as a template.
- Click the **Add** button to save the notification and add it in the Landing page. For other trigger event as rule execution, schedule, you can define the priority of the email
- Select the **priority**: **High**, **Moderate**, **Low**. If you want the email is sent when the trigger event occurs, select **Immediate**.

NOTE You need to schedule the sending of email in Admin/scheduler.

Managing Templates

When creating a notification, you can save it as a template by checking the box "Save As Template" next to the **Add** button.

To access existing templates, click **Templates** on the right side of the screen.

Click a template to load it into the form.

You can delete it by clicking the **Delete Template** button below the list of templates.

Defining Tasks

Tasks inform users of actions that need to be performed to complete a process.

Under tasks folder, you have access to all tasks previously created.

Creating a Task

- Select the task folder and right-click to access to a pop-up menu.
- Click on Create a Task
- Into the form, use the drop-down list to select a trigger. You can set up tasks for:
  - Validation or invalidation of a workflow step of a process: select **Process** in the trigger.
  - Execution of a rule: select Rule in the trigger.
  - Schedule: select **Schedule** in the trigger.
  - Transfer in a hierarchy: select **Hierarchy** in the trigger.
- Use the drop-down list to select the trigger event. Depending on the trigger you have selected, additional information is requested.
- Fill the fields related to the selected trigger
- Use the calendar popup to define the Begin Date and the End Date for the task.

NOTE When the drop-down calendar is displayed, it defaults to the current date if the field is empty. You can click a month to display the list of months and years.

- Click the **To** button and then choose the recipient of the mail.
- Enter a subject for the task.
- Compose the mail by using variables available in the right part of the screen.
- Check the box "**Send as Email**" in the right side of the screen if you want to send the email. If the box unchecked, no Email will be sent, and task will appear only in the Landing page.
- Select the **priority**: **High**, Moderate, **Low**. If you want the email is sent when the trigger event occurs, select **Immediate**.
- Check the option "**Save As Template**" if you want to save the task description.
- Click the **Add** button to save the task and to add it in the Landing page.

Managing Templates

When creating a task, you can save it as a template by checking the box "Save As Template" next to the **Add** button.

To access existing templates, click **Templates** on the right side of the screen.

- Click a template to load it into the form.

You can delete it by clicking the **Delete Template** button below the list of templates.

Publishing Documents

Documents are all types of business documents written by company executives and managers to outline common or individual goals and objectives, annual budget reports, operational documents, guidelines, etc.

Under documents folder, you have access to all documents previously created.

In addition, you can request for a legal signature by using DocuSign Integration. This requires having a DocuSign Account.

Importing a Document

- Select the Document folder and right-click to access to a pop-up menu.
- Into the form, click the **Browse** button to upload a document.
- A popup is opened to select between a DocuSign document or a standard document to be sent

If you select **Standard document** then

- Use the calendar popup to define the Begin Date and the End Date for the document.

NOTE When the drop-down calendar is displayed, it defaults to the current date if the field is empty. You can click a month to display the list of months and years.

- Click the **To** button and then choose the recipient of the mail among all available populations.
- Enter a subject for the document.
- Check the option "Save As Template" if you want to add this document and its parameters as a template.
- Select the acceptance type on the right side: **Accept Option**, **Reject Option** if needed.
- Select if you want that this document can be marked as favorite: **Favorite Option**
- Click the **Add** button to save the document.

For people belonging to the recipient list, they will receive a notification in the landing page under document box and the document will be available in their document library.

If you select **DocuSign** then

- Select DocuSign template among available. The system requires a mapping with the system grid
- Do the mapping
- Click OK

NOTE All fields should be mapped. This grid needs to be created in back end and contains the information that will be used in DocuSign template. DocuSign template needs to be managed by DocuSign responsible.

- Select the date: Start Date and End Date

NOTE Start Date shall not be used in the integration, but End Date will be used as an expiry date for envelope after it is sent. This means that recipient would not be able to sign that after End Date is passed

- Select the population

NOTE It is **important** that if the selected grid using for mapping does not have any record to be used to generate the envelope for payees in population, those payees shall not receive DocuSign document to sign. In addition, the payees are encapsulated by selected population should **ALWAYS** have unique email addresses. Otherwise integration shall not work properly.

- Enter the Subject
- Save

The payee in population will receive an email with instructions.

Managing Template Documents

When creating a document, you can save it as a template by checking the box "**Save As Template**" next to the **Add** button.

To access existing templates, click **Templates** on the right side of the screen.

Click a template to load it into the form.

You can delete it by clicking the **Delete Template** button below the list of templates.

Publishing Reports and Statements

Creating a Report

- Select **Report** folder and right-click to access to a pop-up menu.
- Click on Create a report.
- Into the form, use the drop-down list to select a report.
- Use the drop-down list to define the report as “Link” or “File Generation”.

If defined as “**Link**”: the user will access the report via a link inserted in his analysis box in landing page.

If defines as “**File Generation**”: the report will be directly sent to user according to parameters you will define.

- Select if it is an email or a File Share

NOTE In case of File Share, a document will be generated in the format you selected and put in the folder document. Then the report will be managed as a document so you can define an approval process and it will be accessible from the document library.

- Use the drop-down lists to select the “Param Table” and choose the “Format” (PDF, Excel or Word) in which the report will be generated.

NOTE Param Table is a table that should be created in SQL server prior the subscription is created in the application. If the Param table doesn’t contain the correct controls related to the report, a warning message is displayed.

- Click the **Schedule** tab on the right side and use the drop-down lists to specify the regularity at which you want the result of the report to be sent once (one time) or regularly (monthly, yearly, etc.) and set details for each sending.

If you have selected EMail as Type, you will have access to Mail Tab

- Click the E**Mail** tab on the right side and enable the option “Include Report” if you want the report to be attached to the email. The “High Priority” option will mark the mail as important.

NOTE If the report has a password protection, then the Email option will not be proposed because it is not supported.

If you have select File Share, you will have access to **Zip Tab**

- Select Create a zip with all files
- Select Do not send individual files to population if you don't want that people receive the individual PDF/Excel/Word
- Select in Send To the person or group of persons that will receive the Zip file.

NOTE The person or group of persons should be defined in a population first.

The person or group of persons will get his own report as pdf, and then the zip of report files of all - including his own.

NOTE If the person is in To and in Send Zip To, he will receive the Zip File and his individual file (if the Do not send individual files to population isn't checked). Accept, reject are not applied for zip files. Zip feature isn't available for email.

- Use the calendar popup to fill "Begin Date" and "End Date". It will define the period during which the report will be sent.

NOTE When the drop-down calendar is displayed, it defaults to the current date if the field is empty. You can click a month to display the list of months and years.

- Click the **To** button and then choose the recipient of the mail.
- Enter a subject for the document.
- Compose the mail by using variables available in the right part of the screen.
- Check the box "**Send as Email**" in the right side of the screen if you want to send the email. If the box unchecked, no Email will be sent, and the document will appear only in the Landing page.
- Check the option "**Save As Template**" if you want to add this report and its parameters as a template.
- Click the **Add** button to save the report and add it in the Landing page.

Managing Templates

When creating a report, you can save it as a template by checking the box "**Save As Template**" next to the **Add** button.

To access existing templates, click **Templates** on the right side of the screen.

Click a template to load it into the form.

You can delete it by clicking the **Delete Template** button below the list of templates.

Process Manager (PROCESS Tab)

The Process Manager provides managers options to manage population mobility, process security or crediting.

Administration

In this section, you can manage the mobility on population during a process and the delegation.

Population Mobility

In Administration section, you can see and manage the mobility on a population during a process.

A newcomer, after having been assigned to a population, is displayed in the mobility grid.

- Click Mobility **on population** in the left panel
- Select the payee you want to add to a process.
- Put the **Mobility date** to the arrival date
- Click Save.

The payee is then transferred into the process grid and removed from the mobility on population grid.

In process grid, the arrival date is displayed up to the end of the process.

Process workflow situations will be created for this new payee.

NOTE Note: if the arrival date is after a workflow step, the step will not be displayed.

A payee who leaves, after having been removed from a population is displayed in the mobility grid.

- Click Mobility **on population** in the left panel
- Select the payee you want to add to a process.
- Put the **Mobility date** to the departure date
- Click **Save**.

The end date will be updated with the departure date.

Process workflow situations will be removed for this payee from departure date.

There is a massive assignment feature.

- Select a date to apply the mobility
- Click on **Apply All** at the bottom
- Go to Process

The payees that are new comers are included and leavers are removed to the process at the specified date.

NOTE As for individual mobility, to create mobility on process, you should save the population linked to the process in DESIGN tab. No payee change will be reported if you don't do this action on the population.

Process Security

Here, the process permissions are defined - they are based on ORG hierarchy security definition and in addition workflow permissions can be overwritten.

To delegate a process, first you need to define hierarchy security assignment (see Section ORG/Admin/Hierarchy Security/).

- Click on +
- Click on Browse to select the hierarchy security assignment. The list with all hierarchy securities is displayed.
- Select the hierarchy security you want to use
- Select the process by drag and dropping
- Select the start date and end date
- Enter a description
- Save

Then if you want to put different workflow permissions,

- Go to Workflow permissions tab
- Select Override and set the new permissions
- Save

If you want to add additional exceptions,

- Go to Exceptions tab
- Click on +
- Select a node
- Set New permissions workflow by overriding and setting new.
- Save

Now you have finished the delegation settings.

In the process view, for the user that is part of delegations, a new hierarchy tree on the left panel will appear for the process that is part of delegation.

NOTE If there is nobody below the node that has been delegated, then the node will not be shown.

Crediting Criteria

- Select a Process
- Select the payee you want to assign to a Territory. The association between payees and territory is defined in this screen.

Crediting

- Select the process name
- Select the indicators field you want to use
- Select the date (should be included in process date)
- Select "**Deleted**": if this option is enabled, old values are deleted before importing new ones and calculating.
- Select "**Formatted**": if this option is enabled, the format defined in the cube will be used for the imported values.
- Click on +. A new row appears in the grid
- Click on the icon  to run the crediting

NOTE Note: The rows listed in the grid are shortcuts for executing a process you already executed with the same parameters. Deleting a row in this grid does not delete imported data. It only deletes the row.

For each crediting you can see the following information:

- **Process**: process in which data was imported.
- **Delete before Start**: if this option is enabled, old values are deleted before importing new ones and calculating.
- **Formatted Value**: if this option is enabled, the format defined in the cube will be used for the imported values.
- **Last Calculation Time**: date of the last calculation
- **Last Run Status**: calculated/not calculated

Analysis

The ANALYSIS tab contains a grouped overview of the reports available to a specific user profile. In the current version, there is two types of report: Standard Reports (via Reporting Services), Reports can be scheduled and saved in different format, e. g. to populate statements (Bonus plan, Total Compensation Statement, and others) or ad hoc reports that are been generated directly from the application.

Users can only view and launch reports on objects and data to which they have access to according to their security profile.

Accessing Standard Reports

Standard reports are reports that are stored in Reporting Services and can be downloaded to Excel. They can be configured, enhanced and run based on a user's permission set.

The output can be viewed, stored, and/or downloaded for distribution.

Analysis Section

When opening the Standard Reports folder in the **Analysis** section, the list of available standard reports is displayed in the left panel.

Filter Options

Some filters are displayed to limit the data that are presented in the report.

Once the filters are set, you can click **Show** at the right side to display the report.

Downloading a Report

By clicking on Download button, you can select the format you want to download the report.

Accessing Ad Hoc Reports

Ad hoc reporting features an intuitive Business User Interface and the core capability to design a report quickly. Ad hoc reporting generates reports that meet individual information requirements quickly and easily, allowing end users to dynamically modify and drill through report data for powerful information analysis.

With the Ad hoc reporting function, end users have access to a highly intuitive "Wizard" that guides them through every step of the report building process, from choosing a layout all the way to populating the report with data. Since the foundation for ad hoc reporting is already laid by developers, end users do not need to understand the data source, or create their own queries and can instead simply select which data they want to use from models set up by administrators.

Reports created using the Ad hoc Reporting function can be downloaded as an excel file.

To build an ad hoc report, there are two phases: the configuration of report model which is managed by the administrator and the creation of the report itself based on the report model.

Creating a Report Based on Report Models.

This section is profile based dependent (see Administration component).

In Analysis section,

- Right-click on ad hoc report folder or on a sub-folder

In the menu, 3 options are proposed: **Create a new ad hoc report**, **Create a new folder** to group your ad hoc reports, **Delete** a folder

- Select Create a new ad hoc report. A window with 4 tab is opened: Design, Layout, Controls, Grouping, Preview

Design Tab

- Select Design
- Enter the name of your report
- Select the model you want to access
- Select the field you want to add to your report. A window is opened in the center panel

You can add a second dataset source as Excel.

- Click on Excel Data Source List
- Select the file and download

You can create a new calculated field to your report

Creating a Calculated Field

- Click on Calculated Field List

NOTE At report creation, to make calculated Field list section appears, you need to save your report first.

- Click on  . A popup is opened
- Select the name of the calculated field

At the bottom, you can enter a formula.

On the right in **Dataset fields available for formula**, all fields are displayed

- Select a field among available field highlighted by "**Add**"
- Click on **Add.** It will be added in the formula area.

Then you can add an operator and another field

NOTE Note: you can add any expressions that are standard SQL functions. For example, you can use IF as IIF(Data.input_value_numeric > 100, 'True', 'False'). Please, refer to SQL for definition and syntax.

- Click on  to Save

In formula editor, you can check the formula by clicking on 

You can close the formula editor by clicking on .

NOTE You can add existing calculated field into another calculated field.

Modifying a Calculated Field

Under Calculated Field List section, near the calculated field name,

- Click on 

Deleting a Calculated Field

Under Calculated Field List section, near the calculated fieldname ,

- Click on 

To access to this feature, there is a specific profile access right.

- Go to Admin/Functional Admin/Profiles

Create a new profile or edit an existing one

- Select Analysis
- Click Allowed

In Modules Tree

- Select Ad hoc Report
- Select Enable Calculated Fields into report
- Save

You can add a new template field to your report

- Go to Template Field List

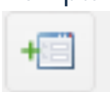
This feature gives the user the ability to add a new column in the ad hoc report without changing the data source of the data model.

When the template is done, in the report, you can add new fields that weren't in the original model.

As example, you have salaries in a default currency and you want to add a column with salary in another currency. The parameter when creating the new field will be currency as CHF, EURO etc...

- Go to Analysis/Ad hoc Reports
- Right click to create a new Ad hoc
- Select the model which template fields have been configured on

Note: If there are template fields that have been set, you will have a new item in Data source list called Template Field.

- Click on Template Field List to add a new column
- Click on 

A popup is opened

- Select the template you want to use in the drop-down list
- Enter the name of the new field
- Enter a Description
- Select a parameter among available parameters
- Save. A new item is added in template field list
- Click on it to add to the report
- Save

Go to Preview to see the result of this new added column.

Then you can **configure the columns** of the report.

- Click on a column header in the center panel. A configuration form is opened at the bottom
- Change the name of the column
- Select properties for decimal precision and the thousand separator for numeric column

Then you can **configure the report** by adding filter and sorting.

- Click on Configure report

A window with 3 tabs is opened: **Filter, Sort**

Filtering

- Click on **Filter**
- Select the column you want to add a filter
- Select the filter type: static Value or Dynamic: with dynamic, you can configure the display depending on another column: for example, if column A value = column B value then the value is displayed. With static, you will configure with a static value: if column A value =10 then it is displayed for example.
- Select the operator
- Note: depending on the filter type, the available operators are different. For dynamic, only equal and is not equal to are available.
- Select the criteria
- Click on **Apply**

Sorting

- Click on **Sort**
- You can drag and drop to change the order of sorting
- For each column, you can select the sorting type: Descending and **Ascending**
- Click on **Apply**

NOTE Note: for sorting or filtering, you can select all columns that are in the model even if they aren't shown in the report.

Then a third tab appears: **Share**

When the report configuration is done, you can see the result in the **Preview** tab.

NOTE Note: At any time during the configuration, you can see the results in the **Report** but don't forget to save your design before leaving the page.

Layout Tab

You can now define the report layout

- Select **Layout** Tab
- Click on 

Then the configuration panel is opened on the right.

NOTE You can collapse it by clicking on .

After each change, you can also see the result in the preview.

NOTE The regional formatting is applied on all ad hoc reports and is set in **My Account/Culture.**

- Click on Save

Control Tab

Then you can define specific controls/filters to the report

- Select **Controls** Tab

NOTE Note to use filter, you need first to define it as for Standard report. Go to Administration/ Edit Filters for more details,

- Select a filter in Control list
- Drag and drop the filter in Assigned Controls
- Save
- Click on the filter. A window in south panel is opened to link the filter to a report field.
- Click Apply

To use the added filter:

- Go to Preview Tab. A new icon on the right is displayed
- Click on the icon

All the defined filters are available then you can set the parameters.

NOTE The parameters aren't saved so if you navigate in another part of the application they are lost.

Grouping Tab

Then you can define specific Grouping to the report

- Select **Grouping** Tab

In this tab, it is allowed to display the ad hoc rows aggregated into groups.

The group will show the title for the group name and then the appropriate records for the group underneath. The groups can also be expanded and collapsed.

On the left part, there are the available columns.

- Select the column drag and dropping

If you want to have expanded or collapsed group,

- Select Expanded or Collapsed in **Default Group View**

` By selecting Sub Total row, you add an aggregate summary row at the bottom of each group.

The aggregation setting is done by:

- Go to Available column on the left
- Click on the column you want to add an aggregation
- Select among the available aggregation operation
- Save

Then, in the report a new row is added that displays the aggregate summary.

NOTE The aggregation is done for the entire group and is not affected by page size.

On top of that, you can also add the report total by checking **Add Grand Total.**

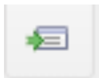
Then at the end of the report, a new row with the total sum is added.

Preview Tab

This tab shows the report once all configurations are applied.

In this area, ad hoc report can be used as universe view creator.

The system offers a specific button in ad hoc report, which shows the generated query of the ad hoc Report. User can directly use this query in his universe view.

- Click on 
- Enter the universe Type

NOTE To create universe, some columns with specific names are required as idPayee for Earn universe for example.

- Enter the name of universe
- Save. The universe is created and synchronized.

Share Tab

This functionality allows sharing your report with a team.

- Click on Share. A window is opened in the center panel.
- Select a team
- Select date for report visibility for the team
- **Save**

If their profile allows them to access the Ad hoc report section all members of the team will see the report as you see it in Preview tab.

Administration Section

In **Administration** section, you can set and manage a report and report controls.

Editing Reports

This feature allows user with the appropriate rights to create a new report that will be accessible in Analysis section.

- Select Edit Reports
- Click **Add** at the bottom of the screen. A form is opened with two tabs: **Properties**, **Controls**

NOTE Note: depending on the profile permission access, a third tab can be displayed: Permissions.

Properties Tab

- Fill the fields:
    - **Report**: Select among available reports the one you want to display
    - **Report Type**: Select Standard Report, Process Report, Simulation report or Home Page report

      Standard Report: These reports will be available only on the Analysis tab under "Standard Report" folder.

      Process Report: These reports will be available only on Design tab/Set up/Attached Objects. On the right grid, the system has to load ONLY the reports with *Report Type* equal to "Process Report". The report will not visible under Analysis tab.

      Simulation Report: These reports will be available only into the drop down list "Simulation Report Name" under the Design tab/Process Properties. The report will not visible under Analysis tab.

Home Page Report: These reports will be available only into the Home Page Management under Admin tab. The report will not visible under Analysis tab.

- Picture **Type**: Select which kind of representation you want the report to be displayed
- **Name**: Name of the report
- **Description**: you can write the description of the report (only for standard report)
- **Show Description**: you can set to show the description (only for standard report)
- **Enable password protection**: you can set password protection for a specific report. (Only accessible if the password protection has been set at global settings level)

- Click **Save**

Control Tab:

According to the report parameters, you can add controls to enhance the report.

- Click on the report's name in the list.
- Switch to the **Controls** tab. The list of available controls for this report type is displayed in the "Control list" grid.
- Use drag-and-drop to move a selected control from the "**Control list**" grid to the "**Assigned Controls**" grid.

NOTE You can delete an assigned control by right-clicking on it in the list, and then clicking **Delete Node**.

- Click on the control you have created to select the filter you want to link to this control. A form is displayed with a drop down list
- Select among the available controls (which are linked to the parameters of your report).

NOTE Once a parameter is assigned to a control, it will not be proposed again.

Permissions

The visibility of the reports in the report hierarchy tree (standard reports) can be limited to a selected period by profiles with specific permissions.

The report will only become visible once the start date has passed and be removed when once the end date has passed. If the user doesn't define the end date the report will be visible for profiles that were given permission in Functional Admin/Profiles.

The permissions tab access depends on profile permissions setting:

- Go to Analyses/Analyses and assign rights to Visibility Admin
- The profile has access to the Permissions tab in Analyses/Administration/Edit Reports/

Then you need to select the profiles which the visibility period is applied on:

- Go to Admin/Functional Admin/Profiles
- Select the profile that can limit report visibility permissions

Then you can set the visibility period for this profile

- Go to Permissions tab
- Click the date field(s) in the grid to edit the date(s) for the profile for which the permissions should be limited

The report will only become visible for this profile once the start date has passed and be hidden when the end date has expired

NOTE Before the permission limitation is set, the profiles can access the reports. To avoid disclosing important information we recommend that the maintenance mode is used during the management of visibility permissions with limitations. A second option is to create the report without real data, and update the correct data once the permissions are set.

- Click the **Save Changes** button. A new report is added in Analysis tab with the filters options you selected.

NOTE To modify an existing report, you can select it and the form will be displayed automatically. Then, you can modify it.

Editing Filters

If the default filters layouts are not convenient for you, by using this interface you can define new control layout and then select it in control tab of your report.

This feature is dedicated to advanced users.

- Go to Edit Filters
- Click on +. A window with a tab is opened: Properties

Properties

- Enter the control name that will be displayed in the top panel.
- Select the type of control you want
- Define the width and height of the control field
- Select the source type: SP (Stored Procedure) or Table
- Select the source name
- Select the display field and Value field: the information corresponding to this field from the source will be then displayed in the control field
- Select Default Value Used if you want to have a default value for this control field
- Select Static or Dynamic: Dynamic means that a Stored procedure with parameters “iduser int”, “idprofile int”, “idpayee int”, “iduserprofile int” is used. Depending on the user attributes, the default value will change.

NOTE If Stored procedure is used, this feature requires backend settings.

- Fill in the Element id: Stored procedure you defined in base or a static value.

Depending on the control type you have selected, some other options can be added to the control.

For example, in case of multi-selection drop down list, you can select if you want a multi selection, if you want to add a filter on the control field based on the user attributes (profileId, userId, payeeId, UserProfileId)

- Click Save. Depending on the control type list, a second tab is displayed: Dependent Filters.

NOTE Only drop-down lists (Drop-down list, Multi-selection drop-down list, Drop-down tree, Multi-selection drop-down tree) can have dependent filters.

Dependent Filters

A dependent report filter impacts the values displayed in another report filter. For example, using a filter to make a country selection (dependent filter) impacts a city filter. With this dependency, it is possible to ensure that when a user chooses a country in a filter, the city filter will display only the cities of that country.

- Select Dependent filters by dragging them from available report filter list to dependent filter list
- Double click the field Filter Field Link to define the relation for each dependent filter

NOTE Once the item is selected as a dependent filter the user will see a drop-down list with filter fields available to link to (current item) and a column you are going to use to make parent-child relation between two components. For example: country control and city control. To do that, add country column in city source and inform system about this country column in city table.

The dependent filter is defined.

- Click Save

Then in Edit Reports, you can select this new control.

NOTE The report should have as parameters the control you set to have a correct behavior.

Source Editor

If you need to add a new report that is not listed, you can use this interface to upload an RDL. This feature is dedicated to advanced users.

A report RDL file can be also downloaded for modifying in Source Editor.

- Go to Source Editor
- Choose a report row in the source editor report list view
- Click the download button shown in the bottom of the report list  .The RDL file is downloaded.

Configuring an Ad Hoc Report Model

The configuration consists of gathering all the data you want to use in the report model and applying some filters and aggregation.

- Go to Analysis
- Go to ad hoc reports model
- Right-click and select Create a new model
- A form is opened in the left center panel.
- Enter the name for the report model
- Click on Add data source. A new window is opened in the right center panel

Configuring a Master Dataset

- Enter the name for the new dataset based on the data source

NOTE Only alphanumeric characters can be used (space and special characters aren't authorized for example).

- Select a views/tables among existing

NOTE Only views/tables dedicated for ad hoc will be proposed. See ADMIN/Technical Administration/Synchronization & Data Security section for more details.

- Click on the field from dataset to add it to the grid in the right center panel
- Click on **Apply** to add it to the model on the left center panel. The new dataset is added to the report model on the left center panel.

The first data source is considered as the master dataset on which you can link other datasets.

NOTE If you click again on the field, it will be removed from the right center panel.

If you want to add additional information/fields to this master selection from another data source you will need to configure a secondary dataset.

Configuring a Secondary Dataset

The secondary dataset comes from a views/tables or from an excel file.

Secondary Dataset Based on Views/Tables

- Click on Add data source
- Select the views/tables whose you want to add some fields/information
- Click on the fields in Field list from data source to add it to the grid in the right center panel
- Click on **Apply.** A popup is opened to map these fields to the main dataset.
- Select the kind of mapping in **Join Type** field: inner join or left join
- Select the field from the master dataset that will be used to map with the current dataset.
- Select among operators: **Equal** or **Not Equal**
- Select the corresponding field in second data set. Now the two data sources are linked.

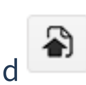
You can repeat these operations to add all the information you want to make accessible in your report model.

At any time, you can remove all data sources by clicking on **Remove all data sources** if you want to start again or **save** if you want to save the model configuration and come back later or continue the model configuration with filtering and/or aggregation.

Secondary Dataset Based on an Excel File

- Click on Excel Data Source List. At the bottom, two icons are displayed.
- Click on excel icon 
- A popup is opened

NOTE If you have already uploaded an excel document you will see it in the list

- Click on the upload and select the excel document you want to upload 

You can also update an existing excel by clicking on 

NOTE Excel file used should be one without macros.

If you select a file by clicking on the window to define the data source is opened directly.

Then once the upload is done, a second popup is opened

- Select the type of column. By default, the type in an excel file is proposed. If you altered the default type and it is not compatible then a message is displayed.
- Select the column that will be used to order. By default, the first row of the excel file is proposed.
- Click Apply

If you click , all excel data sources will be removed.

Now you can select the columns that you want to be added to the report model and the mapping with the main data source (as for any dataset).

Configuring a Calculated Field

- Click on **Calculated Field List**

NOTE At model creation, to make calculated Field list section appears, you need to save your report first.

- Click on . A popup is opened
- Select the name of the calculated field

At the bottom, you can enter a formula.

On the right in **Dataset fields available for formula**, all fields are displayed

- Select a field among available field highlighted by "**Add**"
- Click on **Add.** It will be added in the formula area.

Then you can add an operator and another field

NOTE You can add any expressions that are standard SQL functions. For example, you can use IF as IIF(Data.input_value_numeric > 100, 'True', 'False'). Please, refer to SQL for definition and syntax.

- Click on  to Save

In formula editor, you can check the formula by clicking on 

You can close the formula editor by clicking on .

NOTE You can add existing calculated field into another calculated field.

Modifying a Calculated Field

Under Calculated Field List section, near the calculated field name,

- Click on 

Deleting a Calculated Field

Under Calculated Field List section, near the calculated field name,

- Click on 

Click on the calculated field to add it to your model.

Configuring a Template Field

Configure a Template

- Go to ad hoc models
- Select an ad hoc
- Click Template Field Definition List
- Click on Add Template Model. Three tabs are opened in the center panel: **Properties, Parameters, Lookup**

In Properties,

- Enter the name
- Select the view among available template views that have been synchronized as ad hoc template source.
- Select the form among available forms that have been created (as in example, the form to select the currency)
- Add a description
- Save

Go to the second tab: **Parameters**

- Click on +
- Select the place holder
- Note: it should be {0}. So, the view should use {0} as place holder. If you need several then you need to indent as {1}
- Select the Type: Form if you want to select the pivot parameter
- Select the field of the form that will be used
- Enter a description
- Save

Go to the third tab: **Lookup**

- Select the mapping between the view and the main master dataset
- Save

Using a Template

NOTE A template field can be created from the ad hoc model and/or from the ad hoc report.

- Click on Template Field List to add a new column
- Click on 
- A popup is opened
- Select the template you want to use in the drop-down list
- Enter the name of the new field
- Enter a Description
- Select a parameter among available parameters
- Save

A new item is added in template field list

Additional field configuration settings: Filtering and Aggregation

Aggregation

The aggregation setting consists of constituting and amounting to a whole.

- Select a dataset in the data source list at the left center panel
- Select a column by clicking on the header name of the column.
- Select **Aggregation**
- Select an operation in the list

NOTE Count returns the number of values although count distinct returns the number of distinct values.

The data in the grid are automatically updated.

NOTE The display may take few seconds.

NOTE To see the aggregation configuration, you need to click on the column.

Filtering

You can provide a model with predefined filtering.

- Select a dataset in the data source list at the left center panel
- Select a column by clicking on the header name of the column in the right center panel
- Select **Filters**

If this column has an aggregation setting, in the list of options, **After aggregation** will be enabled.

- Select when you want to apply the filter: **before** aggregation or **after aggregation**. Then a popup is opened to set the filtering parameters
- Select the filtering operations: you can add several filters by clicking on **Add**

NOTE Depending on the column type, the proposed operations change.

The last operation to create this report models is to save

- Click on **Save**

NOTE If you don't save before leaving the page, all changes will be lost.

Now the report model is available in Analysis section.

Simulation Cockpit (SIM Tab)

The SIMULATION enables users to create, save, compare and publish simulation scenarios, out of one screen according to different parameters set, associated rules and populations. You can simulate the cost of a compensation strategy for an individual or group of people in real time, comparing it to other simulations. The result of the Compensation Simulation is shown in a graphical form in real time once the simulation has been launched. The result shows simulated values versus the originally stored compensation model and one or more saved simulation scenarios.

In addition, performance simulation allows simulating company, team or individual performance by directly accessing data grids from process manager.

The simulation provides a screen to user that contains only individual fields in a form view and the user can change these fields' values and see the impact on a global target. For example, the application gives ability to its process users to estimate their earnings by plan. It is called Individual Estimator.

Configuring a Simulation Scenario

You can create a new simulation item by right-clicking a process, and then clicking **Create Simulation**.

A new simulation item is created below the process. You can rename it by a right-click.

A new window is opened in the center panel with 3 tabs: **Modeling, Scenario and Share**.

Modelling

The Modeling tab allows defining the inputs of the simulation by using parameters that have been set in process set-up component as grids, populations and rules.

You can also display the process data.

The first icon  "ALL" is the summary view.

It is also here that you could publish your simulation scenario to production.

Simulating or Publishing a Scenario

Simulating, Publishing or Resetting a Simulation

Simulation

- Click Simulate. A popup appears with additional setting:
  - **Execution on a specific population**: select the population you want to run the simulation. If none is selected, the population is the one defined by default in the process.

When the simulation is done, a pop-up with results is displayed.

Publication

When clicking on publish, the simulation data will be published and the production data in SETUP component will be replaced by the simulation data.

Reset

When clicking on Reset Simulation, you reset all changes you did and you will get back production values.

For example, if you have changed a rule criterion (that means that you added it in your simulation and you did some changes), by clicking on this button, the rule will be removed from your simulation and so your changes too.

Simulation Grids

- Click the Grid item  and use the drop-down list to choose the available grid you want to modify.
- Click the **Add** button to add it in the list.!
- Click the grid in the list to open it.
- Double-click a field in the grid to edit it.

NOTE Only grids that have been assigned in simulation tab of rules conditions can be selected (see RULES/ rules conditions/Simulation tab).

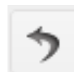
NOTE All the grids should be set as **Simulation enable** type when setting-up these grid (DATA component/Administration/grid editor).

You can use **Import** and **Export** buttons to change data in an Excel file and then import them.

- Click the **Save Changes** button.
- Repeat these steps for all available grids you want to modify.

You can remove a grid from the list of modified items by clicking its row, and then clicking the **Delete** button.

Simulation Populations

- Click the Populations item  and use the drop-down list to choose the available population you want to modify.
- Click the **Add** button to add it in the list.
- Click the population in the list to open the condition that defines it.
- Delete items you no longer want to use in the condition and use drag-and-drop to insert the new values you need to describe the population.
- Use the calculator to insert new Boolean, comparison, arithmetical, date or time functions in your condition.
- When finished, click the **Test** button  to check the validity of the new condition.
- If the condition is invalid, click the **Reset** button  to return to the previous condition.
- When the condition is valid, click the **Save** Changes button.

NOTE The Reset button does not undo your last action. It returns to the last saved condition.

- Click the **Save Changes** button.
- Repeat these steps for all available populations you want to modify.

You can remove a population from the list of modified items by clicking its row, and then clicking the **Delete** button.

- Click the Conditions item and use the drop-down list to choose the available conditions from rules or execution plans folders you want to modify.
- Click the **Add** button to add it in the list.
- Click the condition in the list to open the condition criteria.
- Click a business object to display the list of available objects values.
- Use drag-and-drop to insert items that will describe the condition.
- Delete items you no longer want to use in the condition and use drag-and-drop to insert the new values you need to describe the population.
- Use the calculator to insert new Boolean, comparison, arithmetical, date or time functions in your condition.
- When finished, click the **Test** button to check validity of the condition. A popup will let you know if the condition is valid or not.
- If the condition is invalid, click the **Reset** button to reset the condition you created.
- When the condition is valid, click the **Save** button.

NOTE The Reset button does not undo your last action. It returns to the last saved criteria.

- Repeat these steps for all available conditions you want to modify.

You can remove a condition from the list of modified items by clicking its row, and then clicking the **Delete** button.

NOTE In this screen, you will only see the conditions that have been modified. When running the simulation, all conditions associated to a rule or to an execution plan will be executed.

NOTE If a condition is used in both rules and execution plans, when you have selected in rules, this condition will not be available anymore in execution plan and vice versa.

Process Data

You can access directly to the data linked to a process.

- Click on Process Data 
- Select the hierarchy. The process data are displayed.
- Select a field in the process grid that is editable
- Change the value
- Save

NOTE If there is a calculated field, it will be calculated taking into account the new value.

Scenario

Scenario is the tab which the report is displayed in and comparison can be performed in.

- Click on drop-down list
- Select one or several simulations
- Click on **Compare**

Sharing

The share tab allows defining which team will be able to see the simulation and potentially to modify it.

- Click on **Share** tab
- Select the team among the available teams
- Select the rights you want to give to access the simulation: read, modify, delete, share
- Save

Then, the team members can see the simulation you have shared with them.

NOTE If the member cannot access to simulation component, he/she couldn't access to the shared simulation.

Accessing the Individual Estimator (Estimation)

- Go to Estimation
- Select a process among available processes
- Enter a new value in the available field

Click on **Execution**. A report is displayed with the result.