Partners Online Training

Supportive Material

What is Comidor?

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

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

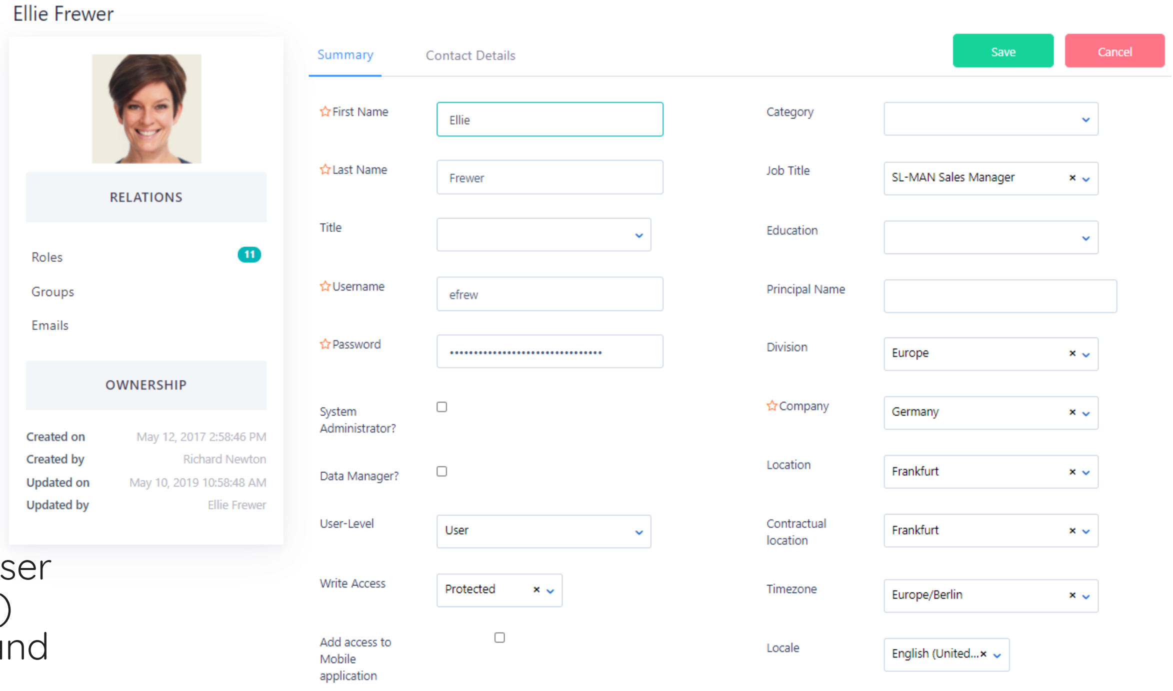
- **LOW-CODE APP DESIGNER**
- App creation in simple steps

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

Users & Roles

- The first user that is registered in Comidor is the System Administrator (Admin). The **Admin** is responsible for managing Comidor Users, creating Personnel and passwords, editing, deactivating a user, and more.
- Every time a new user is created a new record is inserted in Personnel table, with active state.
- You can create a new User and then modify their details in the Personnel unit
- After creating a user, you need to allocate specific Application Rights and add the user to a group(s) in the organizational chart
- System Administrator access is available only to users that have the Enterprise Architect role
- A user can be de-activated but not deleted.
- Rights can be assigned to an existing role that can be assigned to a user in User Roles. These rights (managed from the Application Rights unit) can give responsibilities such as handling financials, setting up users and their application rights, or handling people management activities e.g., absences.

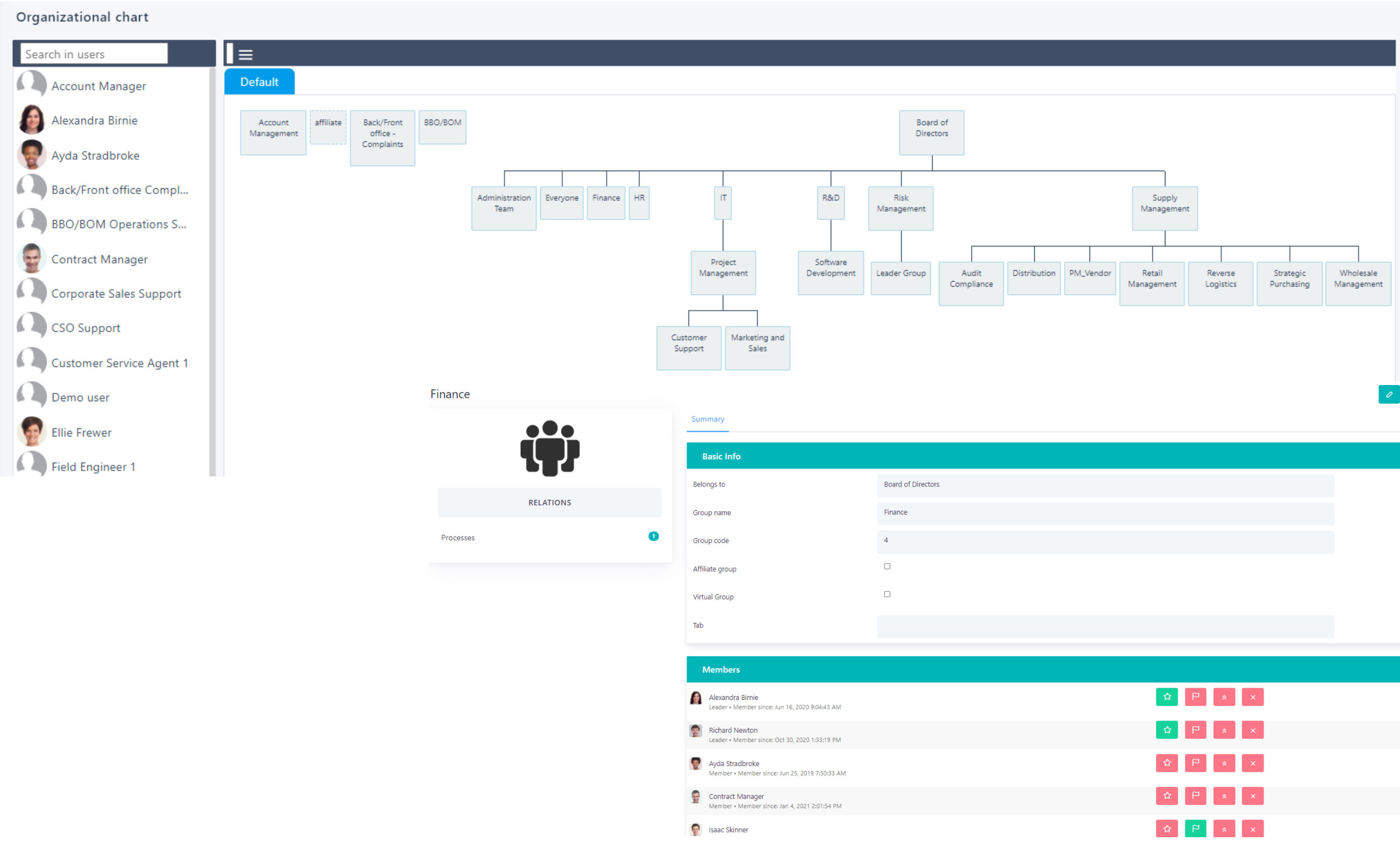
Find out more here.



Organizational chart

Depict your organisational structure and build functional teams

- **Make the structure** of your company **clear** to any employee
- Ensure that **information flows correctly** throughout the company. Groups, leaders and just members can be used as assignment options in tasks and processes.
- Design your [Organisational structure]() and **fulfill your goals**
- **Enhance collaboration** between different departments in the organisation
- **Distinguish** between the **leaders** and the **members** of a group easily and illustrate the relationships among personnel
- **Organise** and **monitor** the company's performance by group



[Find out more here.]()

Application & role rights

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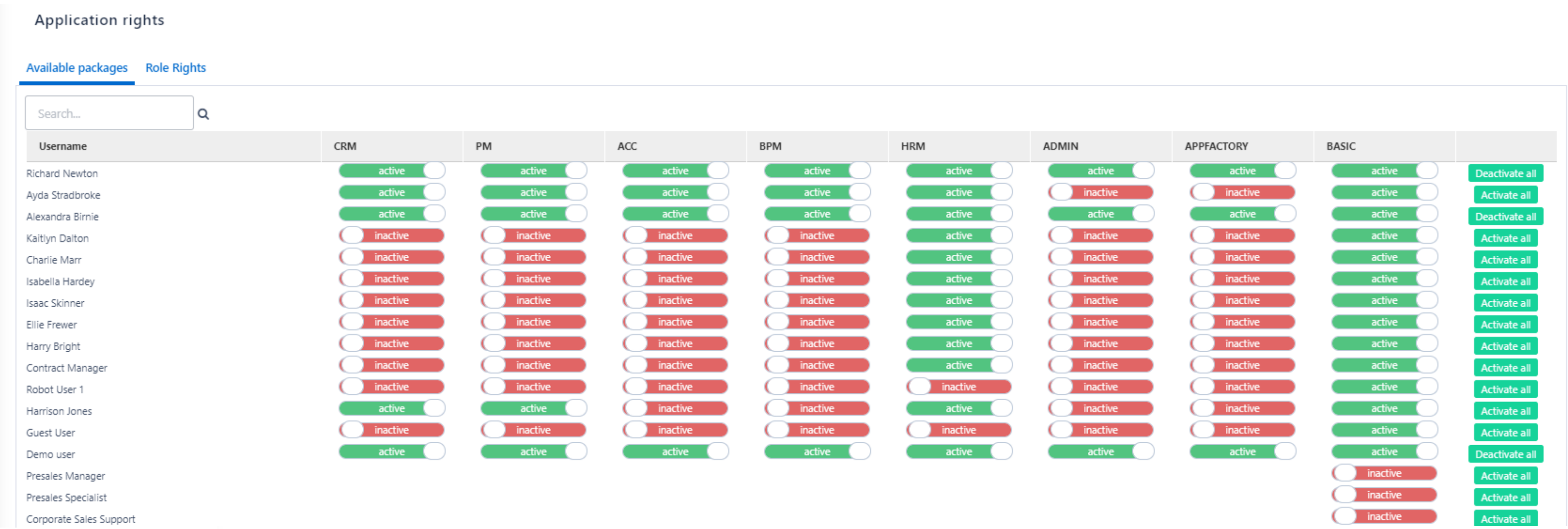
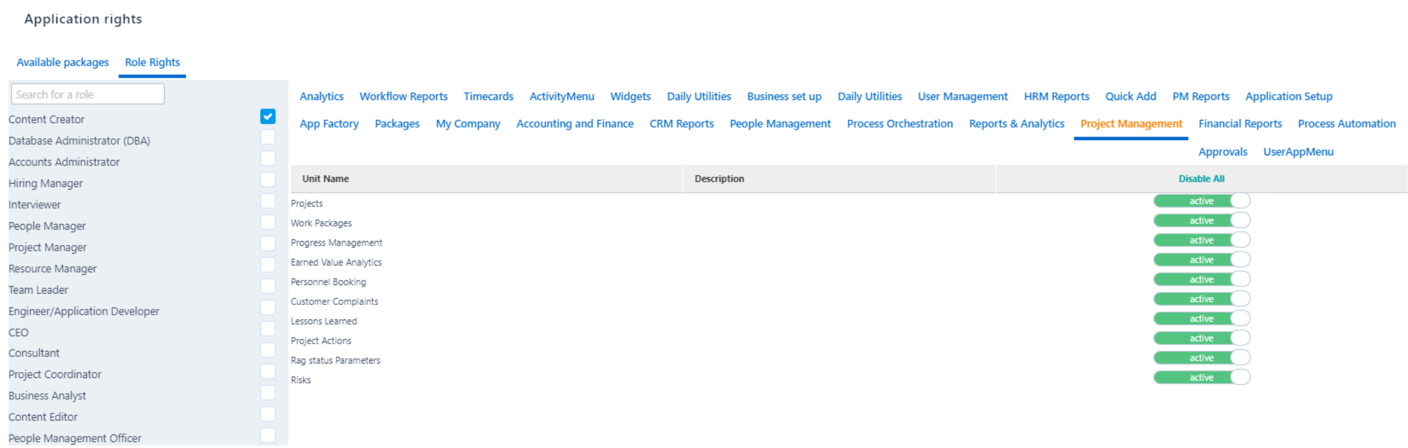
- Application Rights gives the ability to administrators to hide or allocate modules and menus to users e.g., you may want to let specific users have access to the financial module.
- With Comidor you can allow users to access certain modules but restricting their access to functions within those modules. Any role created can be managed in terms of Rights (e.g., which units from Modules will be visible for each role).
- This refers only to System Administrator Users.

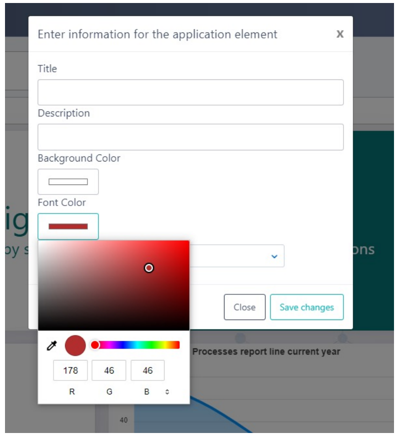


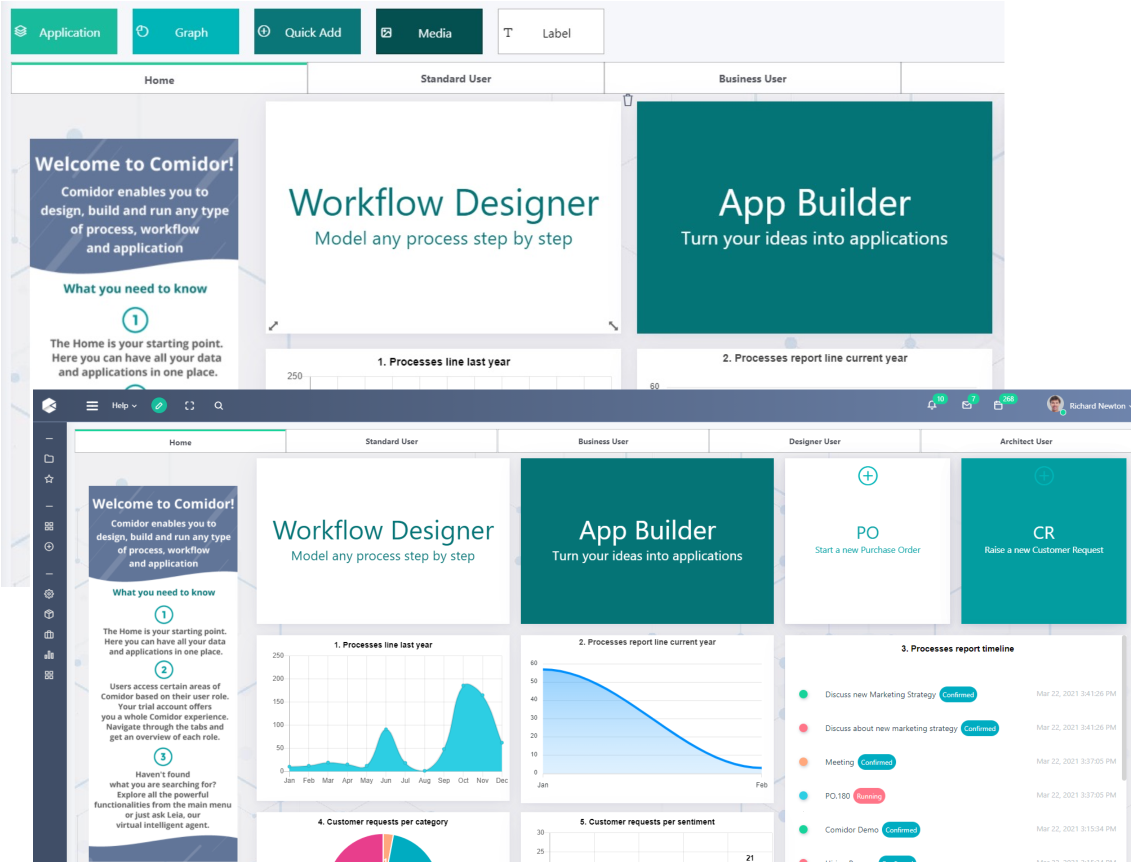


[Find out more here.]

Home Dashboard

- The default screen in Comidor is the Home Dashboard. The new Home Dashboard saves you time, offering exactly what you need in one single panel. With all your applications and widgets in one place, your work has never been easier.
- Create a more customised experience that matches your daily tasks and processes. Build and modify your dashboards with a simple to use no-code builder.
- Add multiple tabs, application tiles, “quick add” tiles, graphs, media(images/videos), and labels.
- Customise your dashboard easily with drag-n-drop tiles and add the colors you wish, resize or delete them.



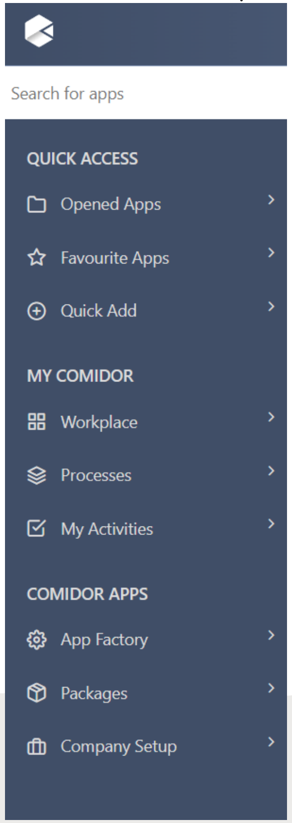


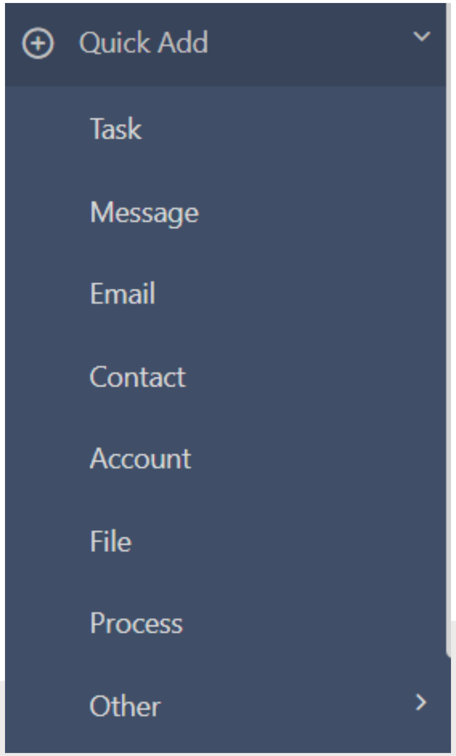
[Find out more here.]

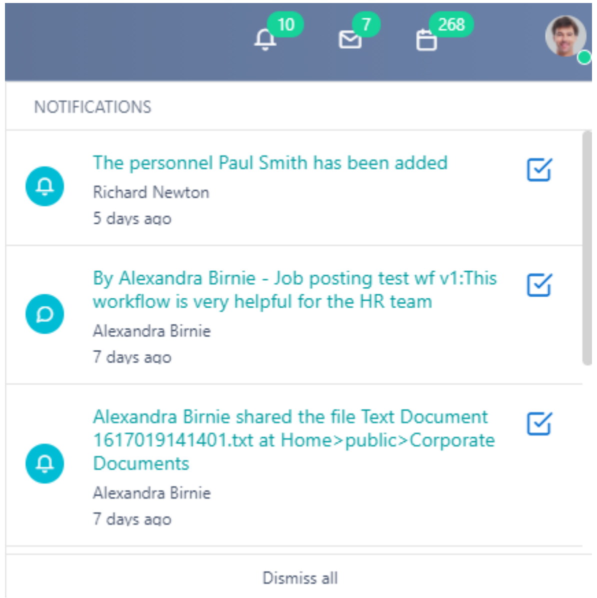
[View video here.]

Menu & Notifications

Comidor is designed to enable users to focus on their tasks and prioritize their workload. Menus, filters, icons, buttons and lists are all designed and arranged in a way that allows users to easily identify their needs and tasks and execute quickly and efficiently.

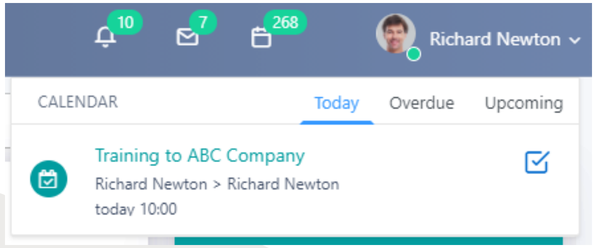






Find out more **here** about Comidor's menu

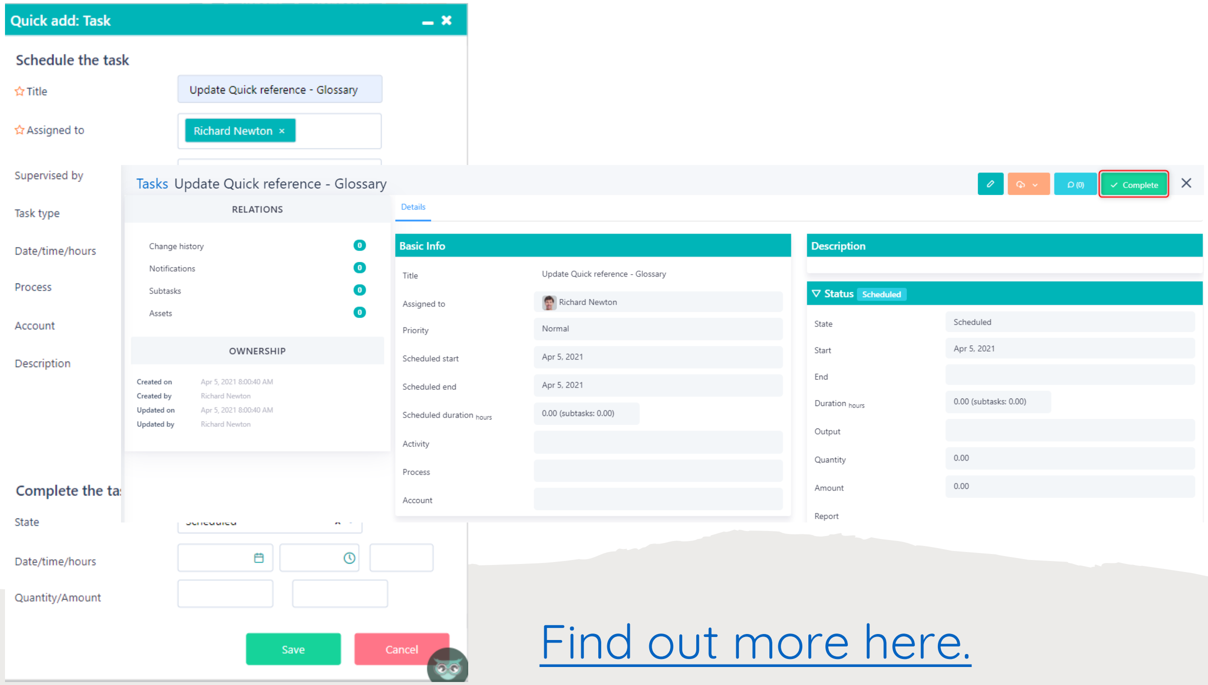
- In the top right of the page is the Notifications Bar. There are three icons and when a new notification is received a blue box will appear next to the relevant icon. The five icons are:
- **Notifications**
  - **System Notifications** These inform the user when a new task/process is added; when it's time to start a new one; when someone has shared a folder or when an existing task/process has been completed. Reminders will show up here as well. These Notifications are also in the Workbench Activity Stream.
  - **News** – When someone has commented on a specific Process or Task a notification will be displayed here. Notifications regarding specific Comidor objects are displayed here as well
- **Messages** – When a new Email is received the alert will be displayed here. Customise Email notifications in User Settings
- **Calendar** – The Calendar icon opens a Calendar that shows your tasks for the current day



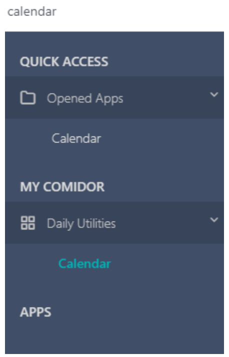
Tasks & Calendar

Comidor Tasks offer a reliable and transparent approach to Task Management. It manages personal tasks, team tasks, assigned tasks and tasks assigned to other users. All Comidor tasks can be managed, even if they have been created using another Comidor unit (Quick Adds or Calendar).

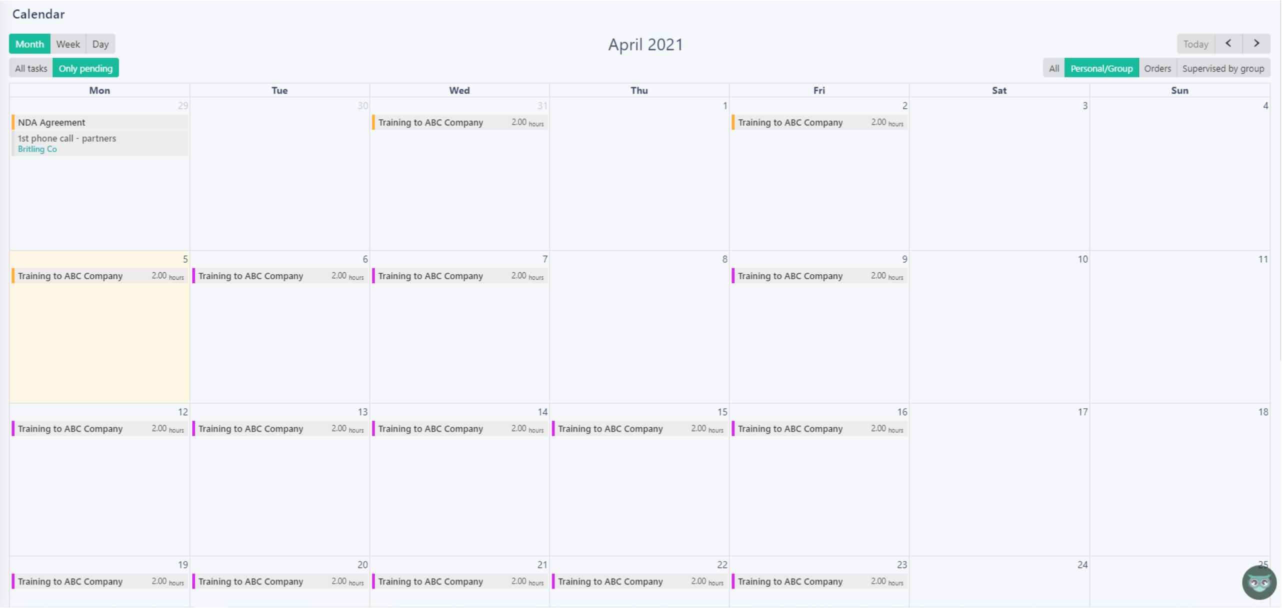
- Tasks can be created for completing a one-off task, e.g. write a report on the impact of GDPR.
- Tasks can also be linked to a Process.



[Find out more here.]



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

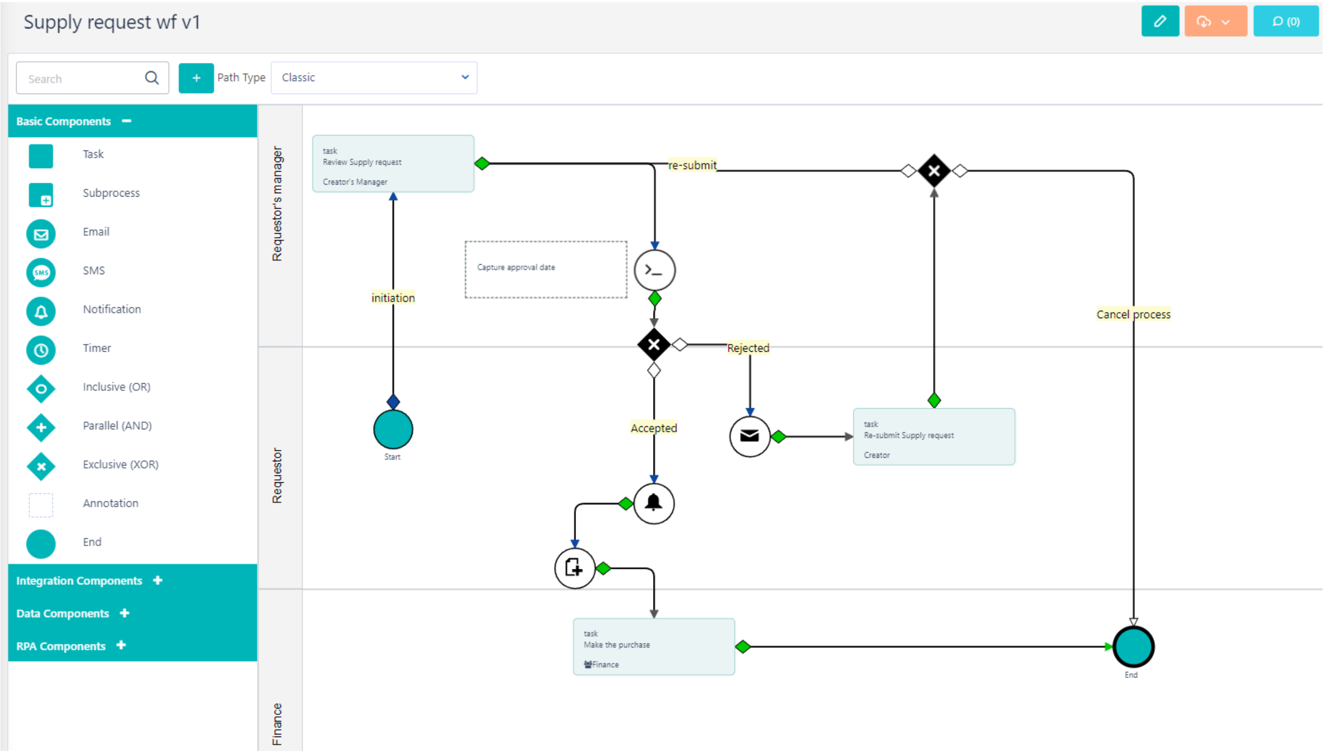


[Find out more here.]

Workflow Designer

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

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



[Find out more here.]

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Workflow Components

Basic Components

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

Integration Components

- RESTful Web Service
- Message Queue
- Teams Integration
- Google Integration
- Zoho Projects API
- FreshDesk API
- Salesforce API
- Zoho Leads API

Data Components

- Comidor DATA (IUD)
- Shell Command
- File Reader
- Export Data
- Convert data
- Digital Signature
- Document Creator
- QR Generator
- Table Extractor
- Excel Processor
- Create graph
- SQL Creator
- Blockchain

RPA Components

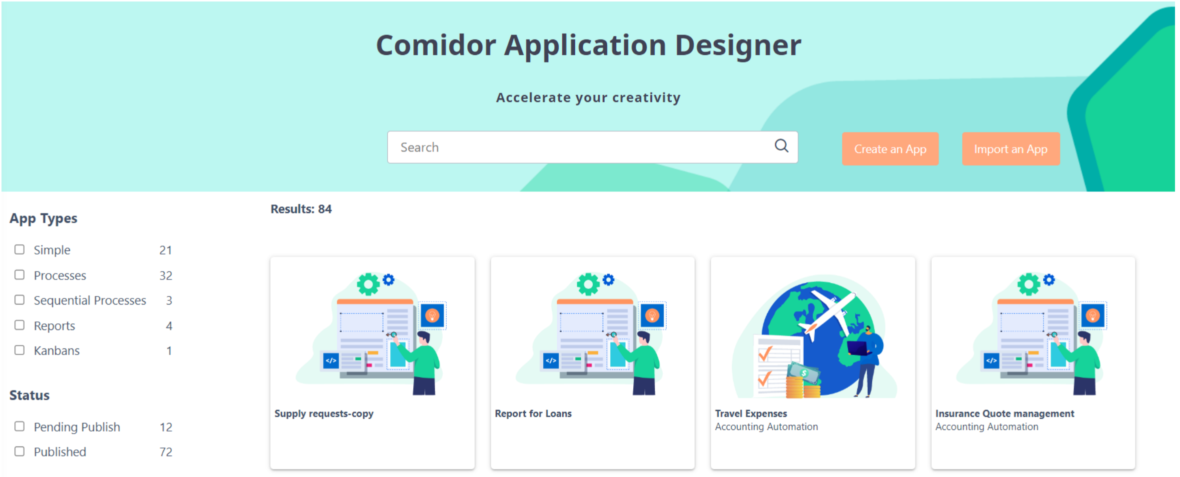
- RPA Caller
- RPA Receiver
- Sentiment Analysis
- Document Analyzer
- Text Classification
- Predictive ML
- Selenium RPA
- Image Classification
- Web Scraper

Find out more here.

App Designer

Comidor platform offers the ability to design your own apps through [App Designer](), without using any coding. Making simple or more complicated Apps is easier than ever, even for non-developer users. Comidor guides you with simple steps, in order to publish your idea.

There are various types of applications provided in Comidor App Designer. You can choose the one that fits better your needs from the following options.



Types of Applications

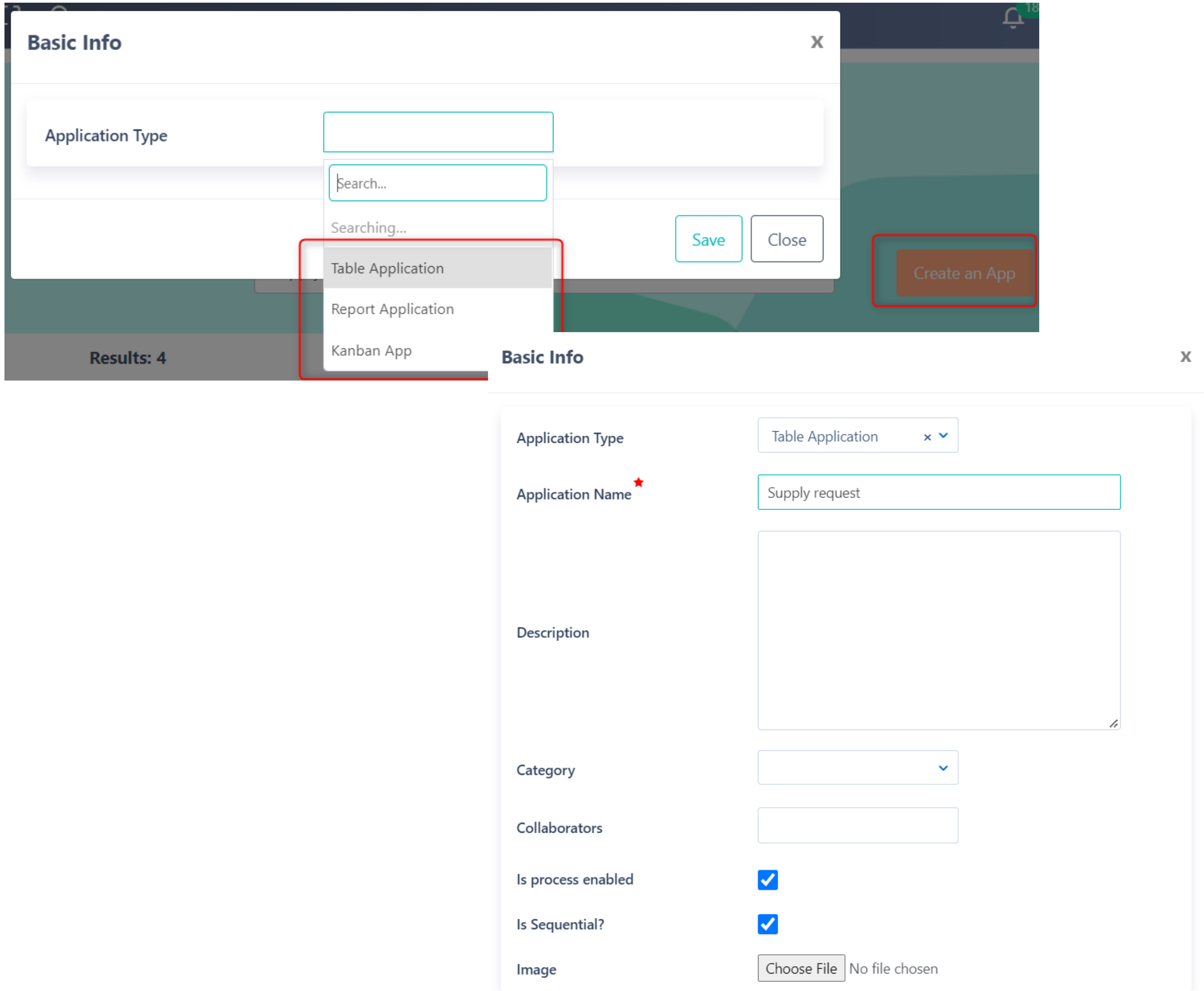
1. **Table applications:**
   - **The Sequential process-based: Choose this type when you want to monitor processes that are simple with only sequential tasks, with scheduling, state, completion, etc.**
   - **The process-based workflow: Choose this type when you want to monitor process-enabled records, with scheduling, state, more complicated workflow steps, loops, automation steps, completion, etc.**
   - **Simple Non-process based: Choose this type of table application when you want to create a table of data-driven records. No workflows can be related to this type.**
2. **Report applications**
3. **Kanban applications**

Create an App

Application example: Supplies

Basic Info

1. Select the **Application Type** (Table/ Report/Kanban)
2. Give the **Application Name** and **Description**
3. Classify your app in a proper **Category**. Choose one Category from the existing options or make a new Category. Categorization will help you find easier your apps in the App Designer.
4. Define whether the App is **Process enabled or not**. Process enabled apps can be linked with a Workflow.
5. **Collaborators:** determine which users will be able to see the application in the User Apps menu.
6. You can lock your app, so only your user can edit the app.
7. You can upload an **image** for the application.



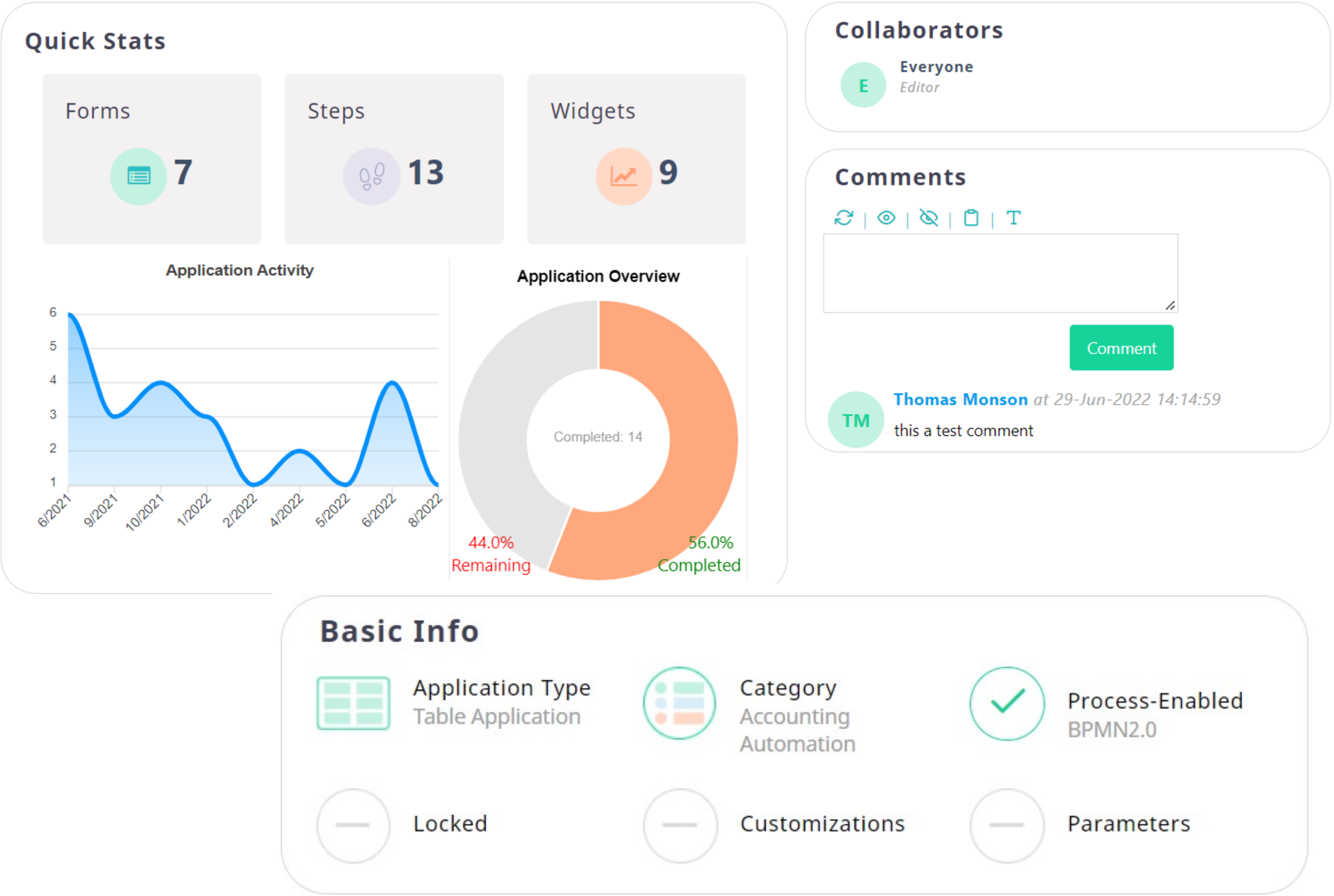
Create an App

1. Dashboard

In the step Dashboard, you get an overview of your application. In particular, you are able to view:

- **Quick Stats:**
  - Number of forms, Steps and Widgets that are created in this app
  - Graphs that show the application activity timeline and the Apps Overview status.
- **Basic Info:**
  - the Type, Category, and other parameters
  - You can click on the pencil button to edit the above info
  - You can lock your app by checking on the Locked option. With this option, only the user that locks the app will be able to edit the app (in all steps). All the rest users will just be able to view the app, but can not edit it.
  - By checking the Has customizations option, the application will not be exportable.
  - Put a flag to remember if this application Has application parameters.
- **Collaborators:** the users or groups that have access rights in this App.
- **Comments:** an area where users that have access can write and view comments.

Application example: Supplies

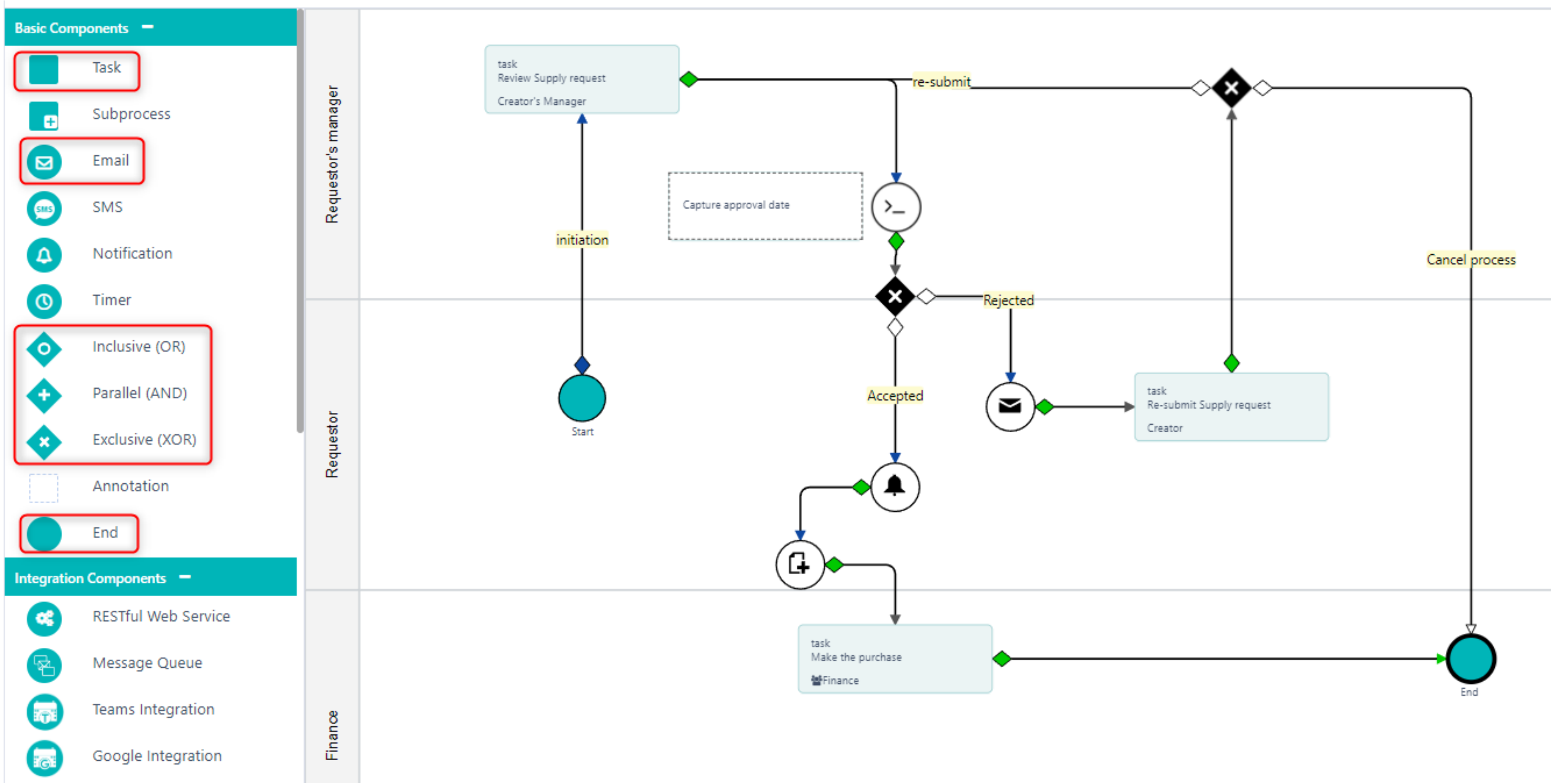


2. Process
Workflow

In this step, you can fully design your process in terms of the number and the looks of the process steps, your Data model, Table View and User forms.

Workflow example: New Supply Request

- Separate the pool in different lanes according to which group will perform each task
- Create the 3 tasks with drag and drop functionality
- Decide which of the gateways is appropriate according to the case
- Connect the tasks with the gateways to complete your workflow



2. Process

Data Model

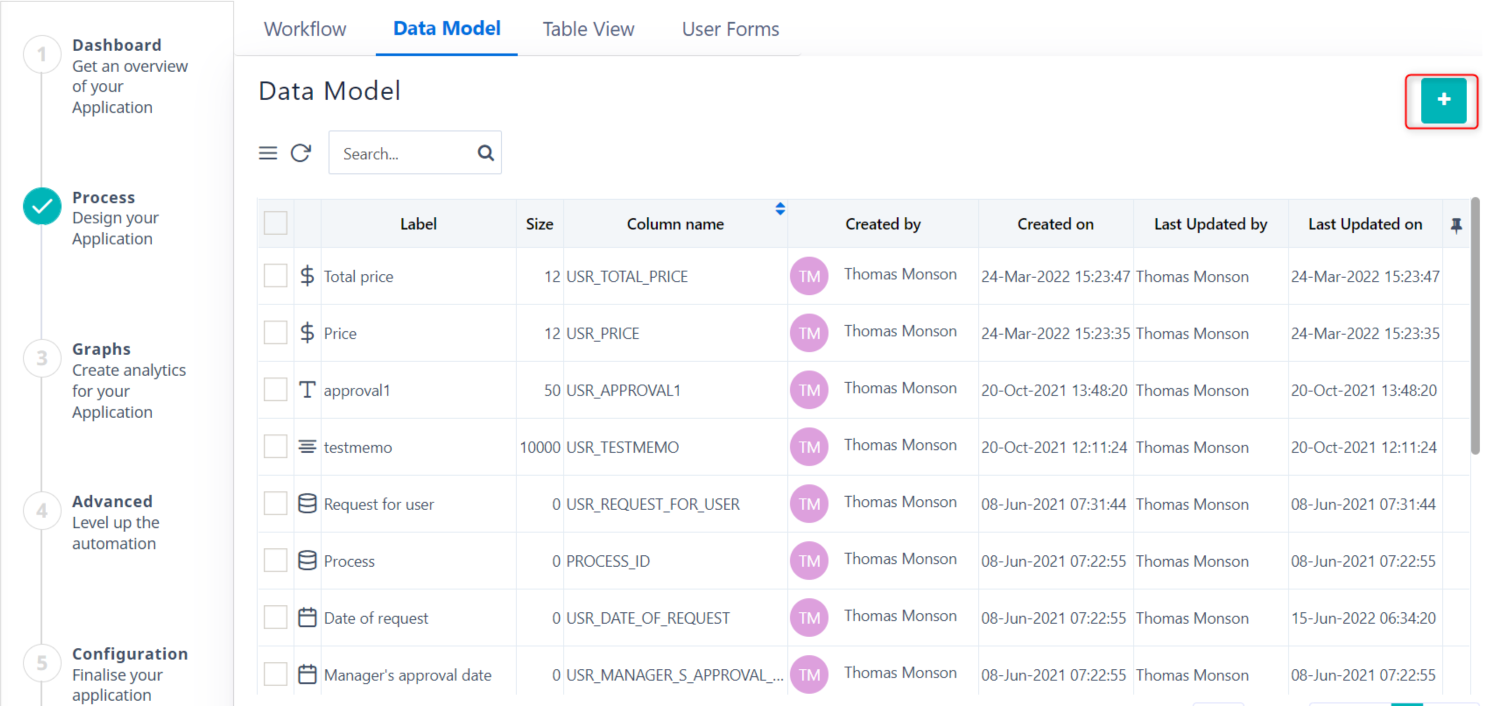
When you open the Data model tab, you will see a sub-table with the some columns: icon, label, size, column name, created by, etc.

You can see the existing and/or add all fields that you want to be used in the App here. You can click on the “+” to create your own custom fields.

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

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

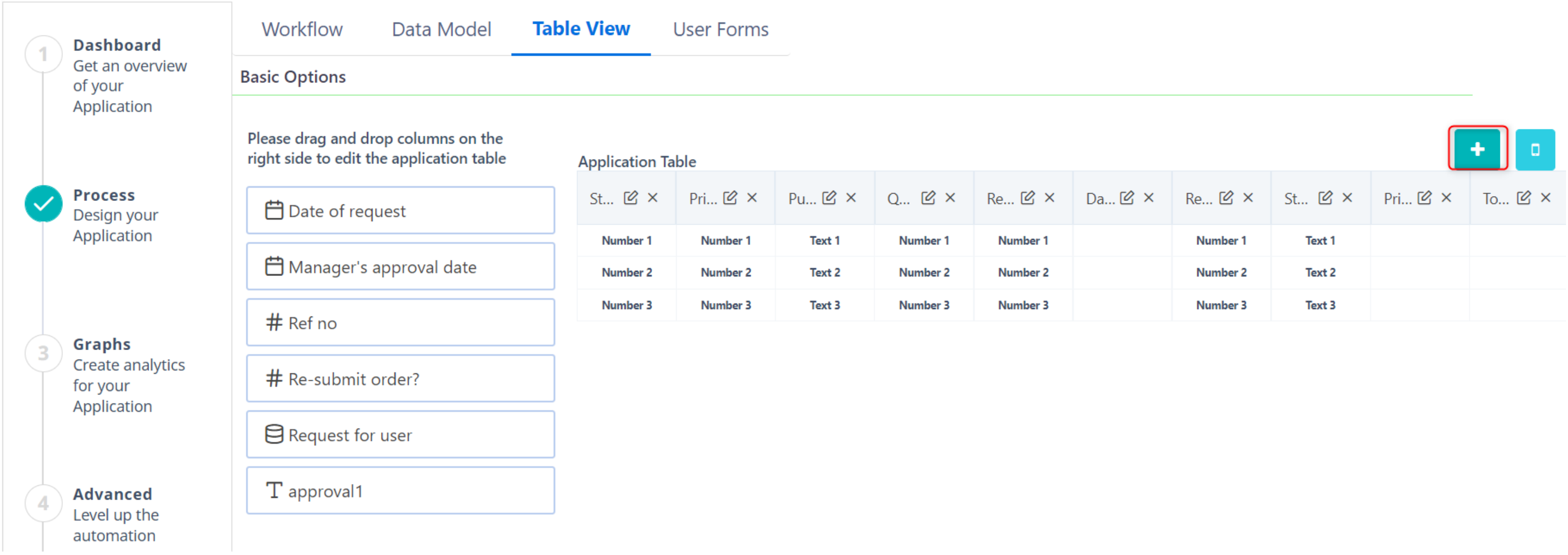
Do not forget to reload the DB after you created all the fields, so that the other users can see them.



2. Process

Table View

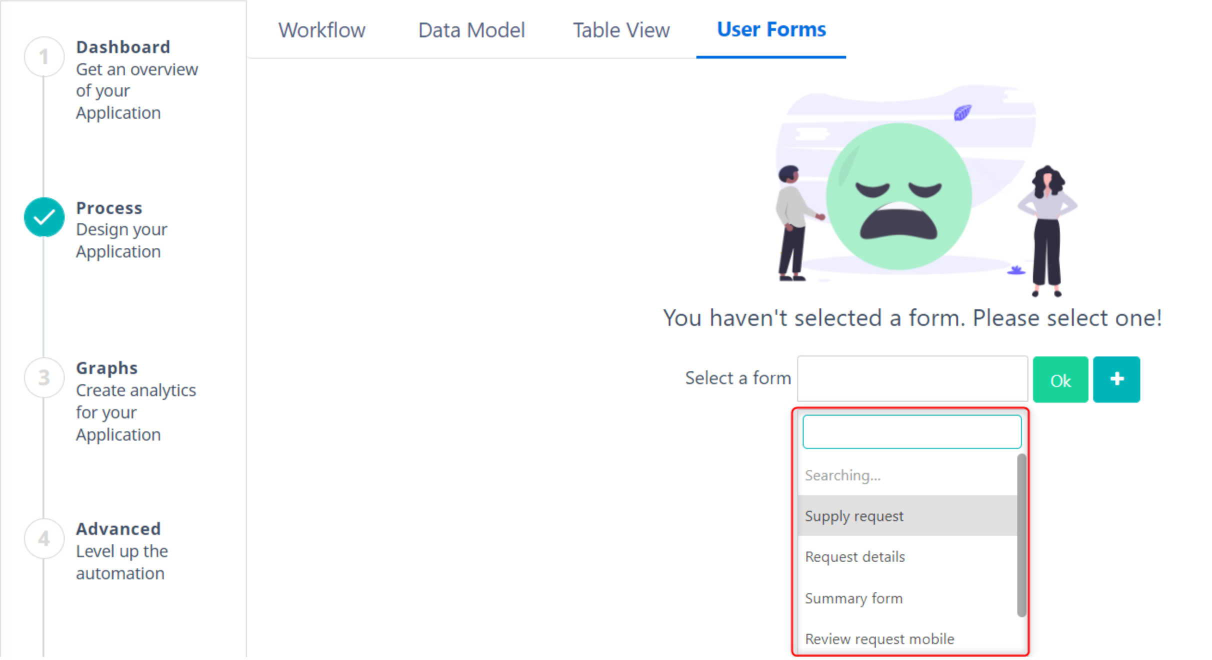
- You can determine which columns you wish your App to have in the main table. By default, you should see all the table fields you have created in the steps and will be added as columns in your application table. Each field has pencil and x buttons.
- You can add more Columns, by clicking on the “+” icon and selecting the desired field.
    - Note that, if you have selected this app to be process enabled, you can also add process related fields as columns(e.g., date created, creator, stage, etc.)
- Re-arrange the position of each column with drag-n-drop.
- Add label to the column name, set Prefix or Suffix to be displayed before or after the value of each entry, select the preferred alignment and other properties.
- Switch to mobile view, to get a preview of your Application table in a browser of a mobile device. Choose a preferred device (mobile, tablet)

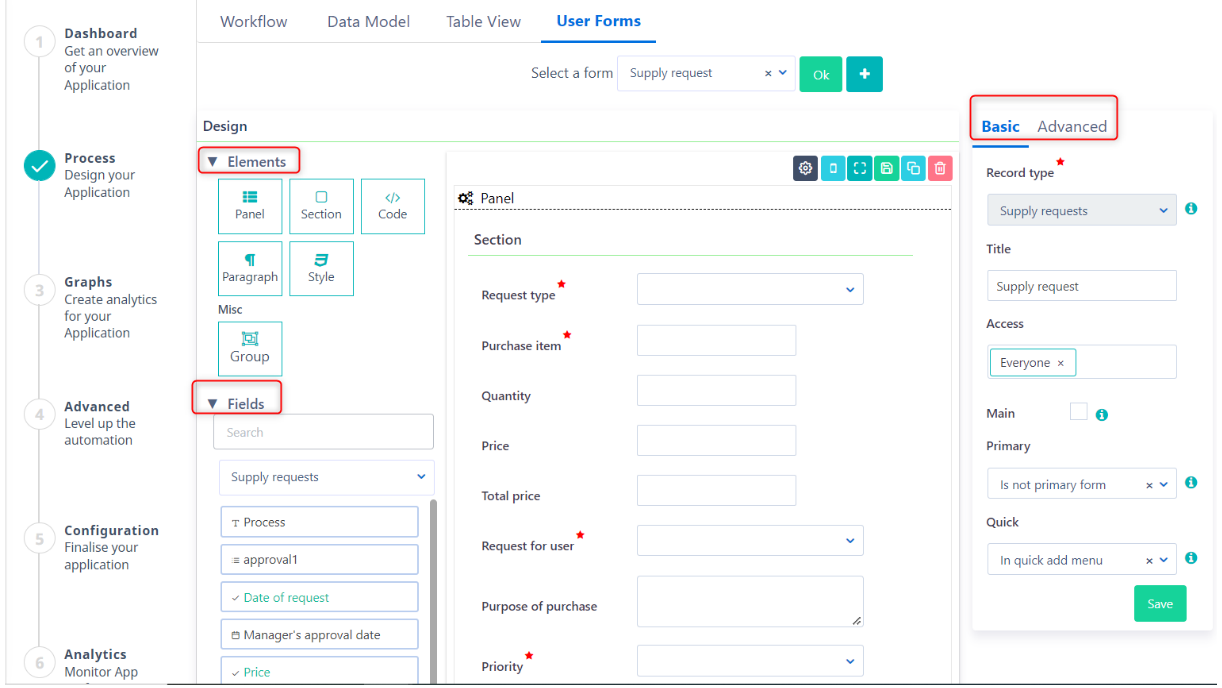


2. Process

User Forms

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





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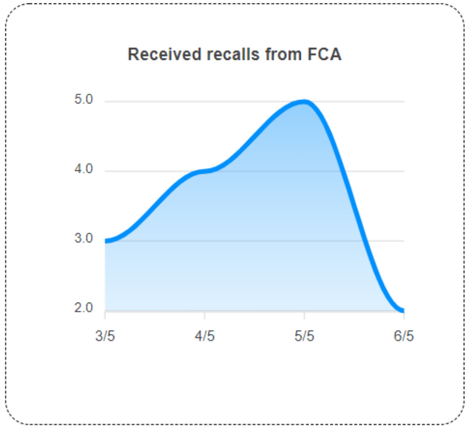
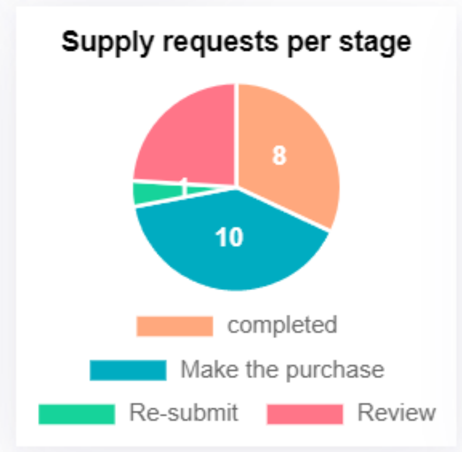
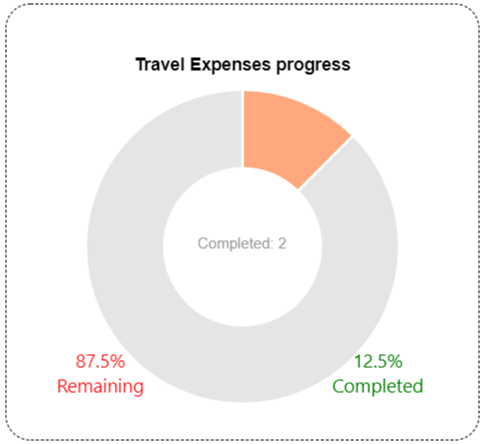
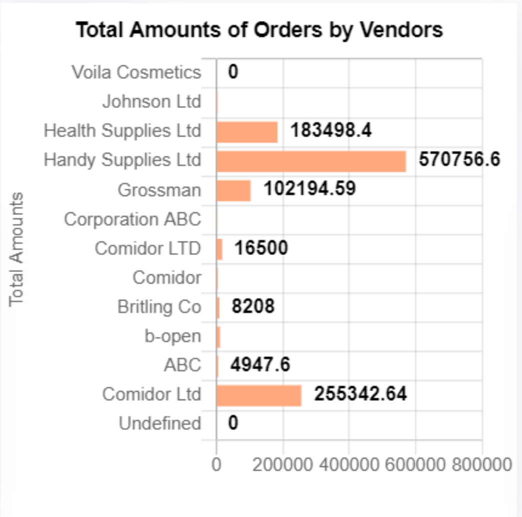
3. Graphs

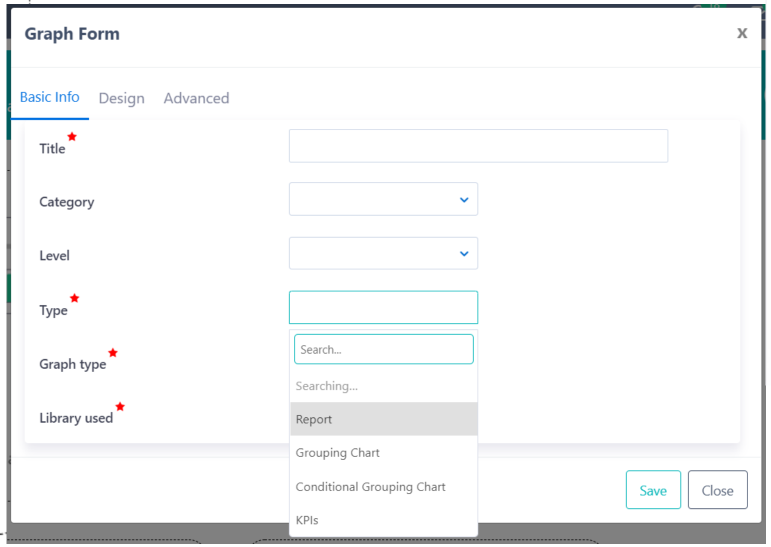
- In step 3, you can design your app Graphs or Widgets. Comidor Widgets are the ideal choice for data visualization. Get the most updated data on the visualization format you define.
- Create your own personalized dashboard in seconds.
- Combine multiple views of data to get richer insight.

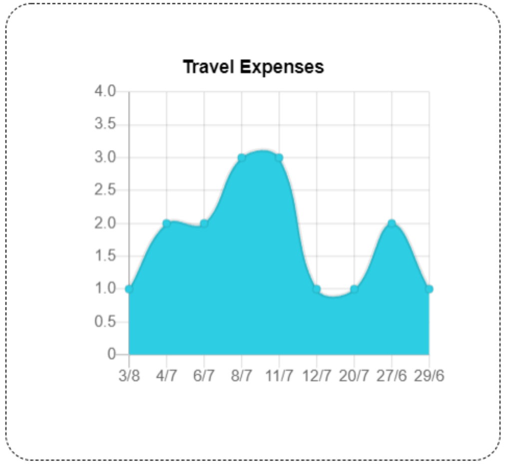










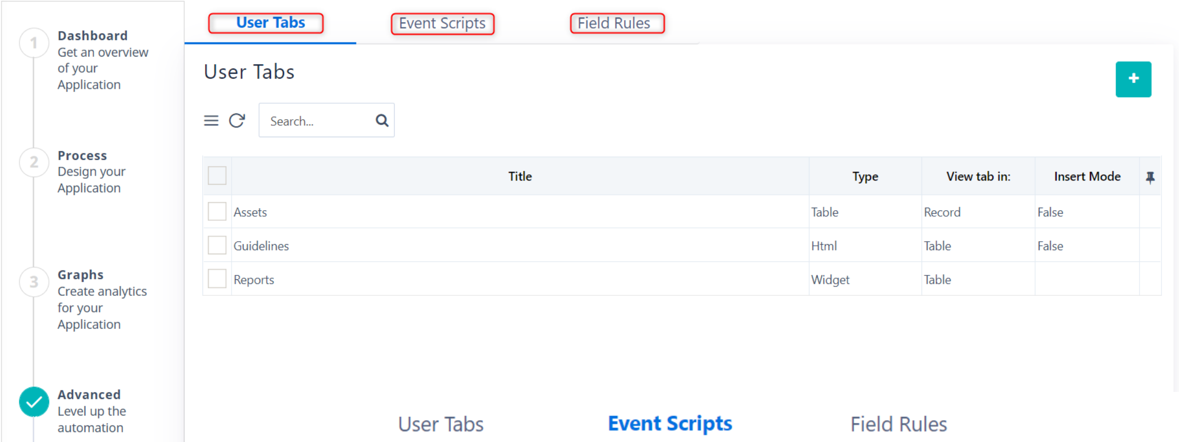


4. Advanced

Get the most out of the App Builder with this advanced options step by including **user tabs** in your records or the table of your app, **event scripts** and **field rules** to show or hide fields, sections or tabs in forms when specific conditions are met. This step is available only for Table applications (non-process & process enabled).

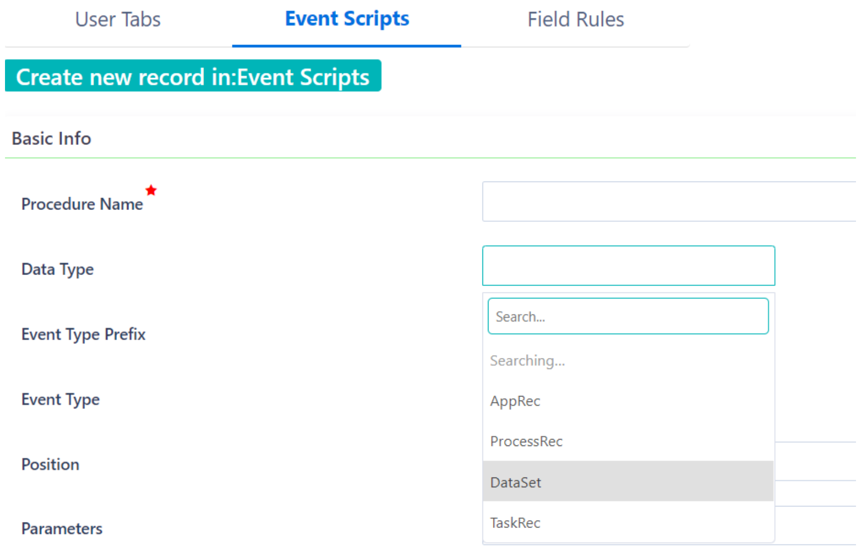
- **User Tabs**

Use tabs to have complete control over the accessibility of your application.
•The tabs can appear inside records (as a tab at the left part of the record) or at the summary table of the application.
•A tab can be a table from any Comidor entity, HTML, or a widget.



- **Event Scripts**

- In this step, you can write scripts for a certain Data Type to be executed before/after/on a specific event.
- Choose the **Data Type** (apprec, task, process, dataset) and define where you want the script to be applied
- An Event Type can be inserted, updated, deleted, etc.
- In the **Procedure Body** add your code.
    - This is for advanced users to write their procedures.



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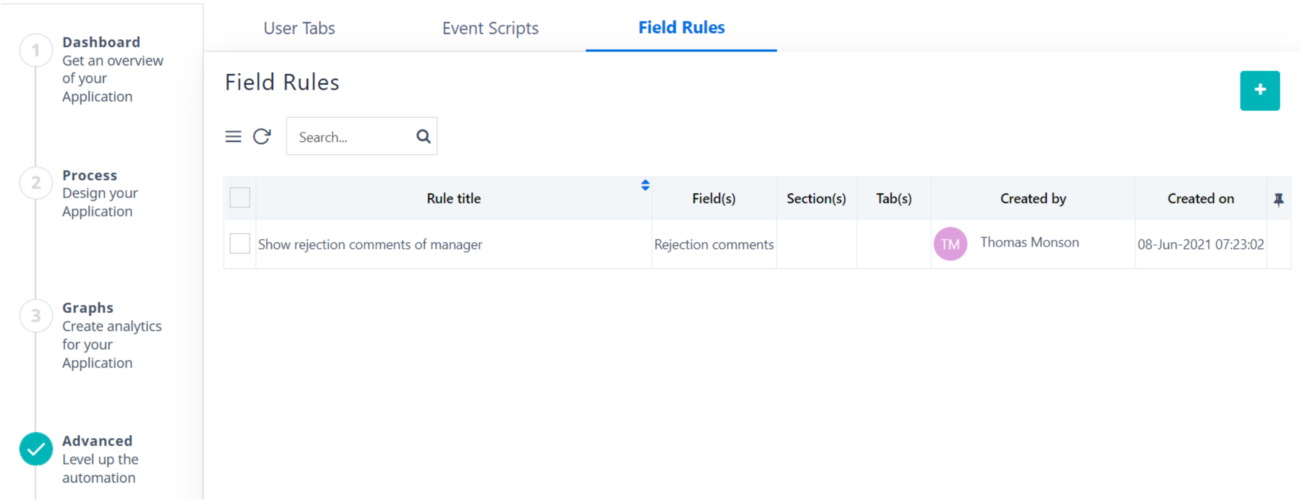
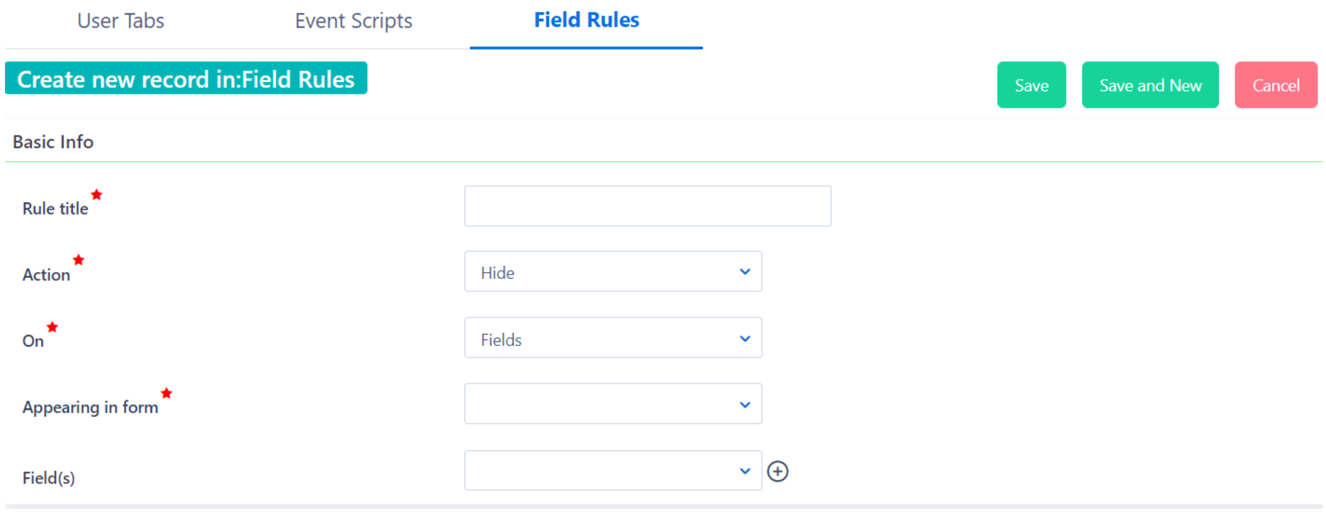
4. Advanced

Field Rules

- The field rules functionality enables you to hide or show fields/sections/tabs inside forms when certain conditions are met.
- You can click on the Field Rules tab and you will be able to see the sub-table of all field rules, with the following columns: Rule title, Field(s), Section(s), Tab(s), Created by, Created on, and the pin button.
- Refresh button: Internal refresh in the table/all updated records are presented
- Search option: type a keyword and press enter; respective field rules appear.
- Pagination: Navigate through available pages to see all Field rules.
- To create a new Field Rule you can press on the “+” button, and the creation form opens.





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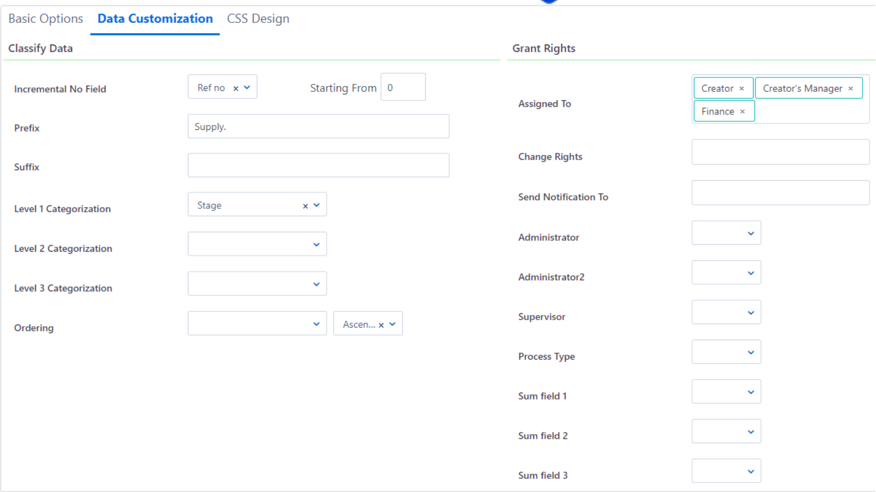
5 Configuration

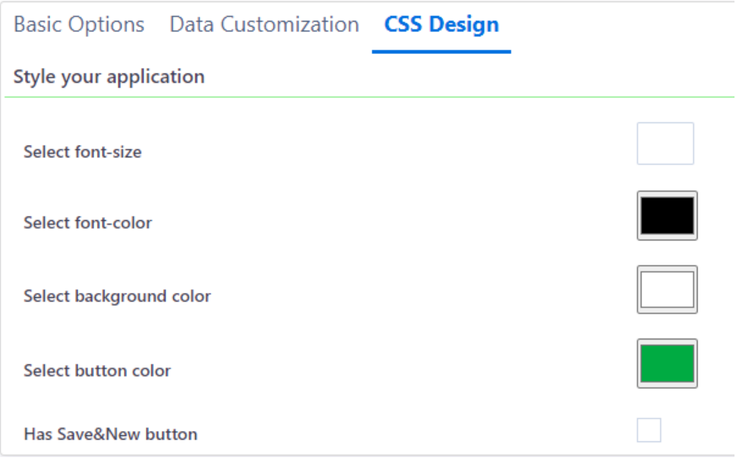
- In this step, you can make the configuration of the Application.
- Decide if you wish to include from the **Basic options (1)** (Notes, Tags, and Links, create, edit and/ or delete an entry, include print/export options)
- **Customise your data** (2) by
  - setting a Prefix and Suffix, an Incremental Number Field
  - Defining a **Primary Field**
  - Defining to whom each entry is assigned to, send notifications, Admin 1,2, and Supervisor.
- Fully customise the app layout, by selecting font sizes and colors in **CSS Design** (3) options.

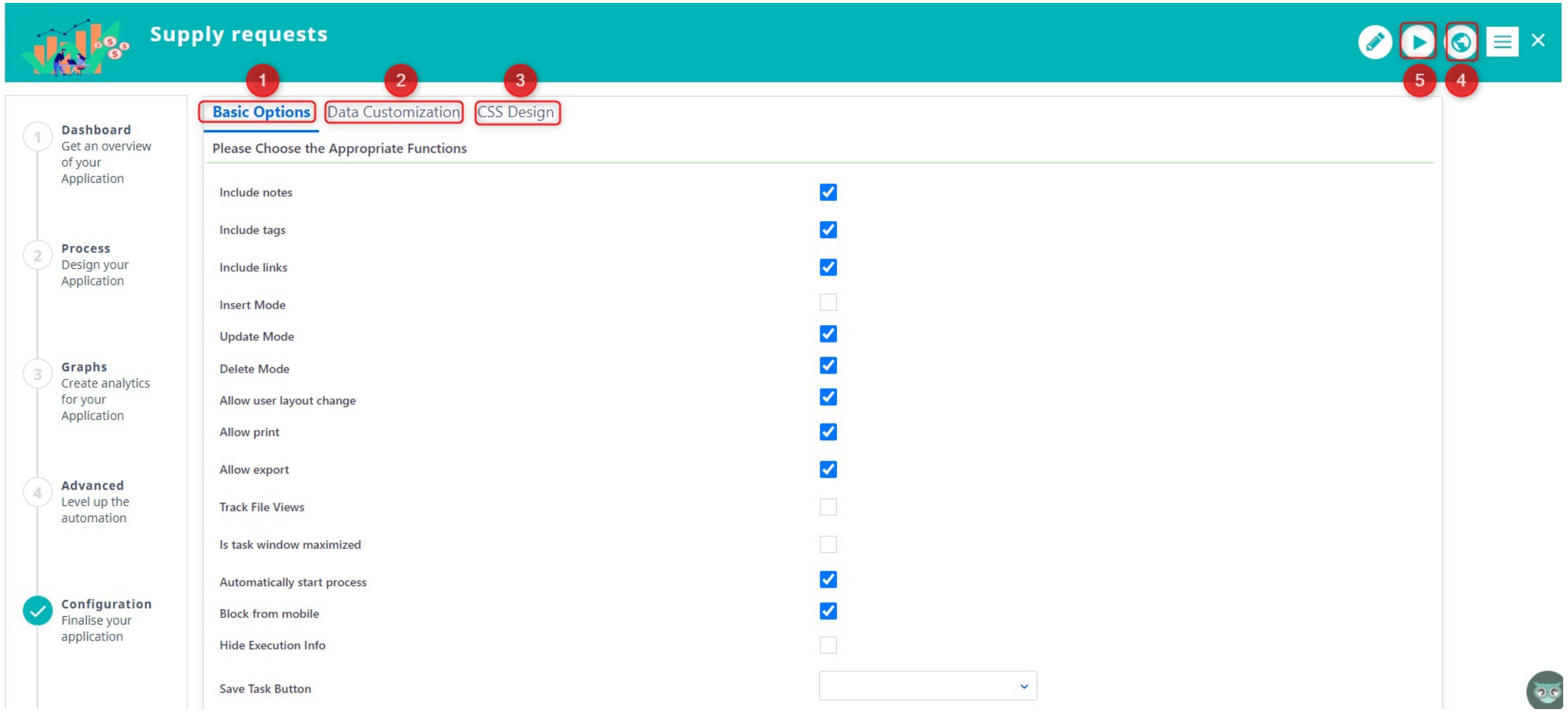


Publish (4)

- Your app is ready to be used!

- **Run from app designer (5)**





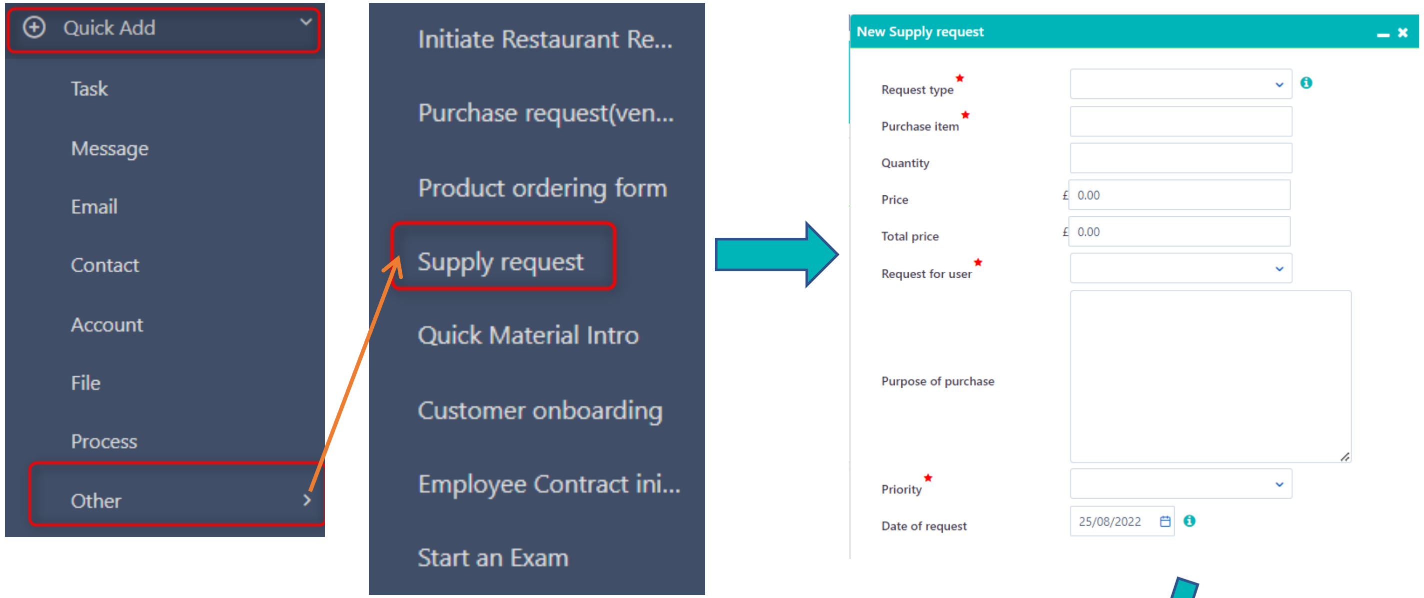
Run your application

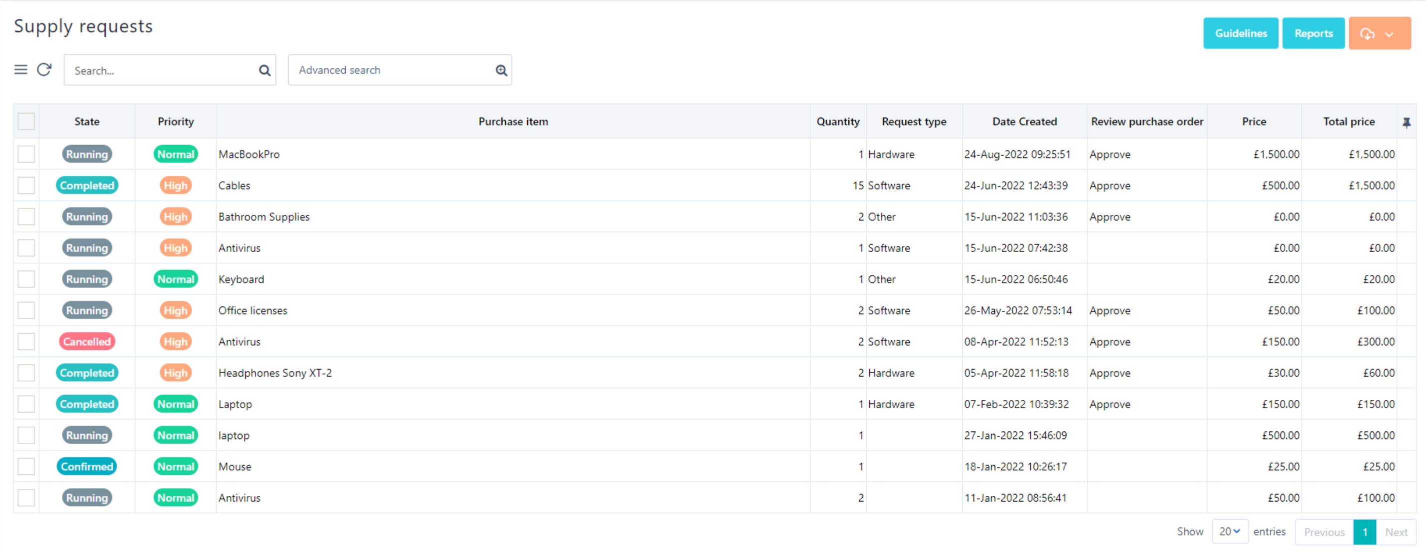
You can view the User Apps you created and published through App Designer, go to the menu on the left side of your screen, and select the Packages Icon. A list of all the published apps will be displayed here under the category you chose in Step 1 of App designer. In case no Category is chosen, the app is shown below Custom Apps.

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

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

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





State	Priority	Purchase item	Quantity	Request type	Date Created	Review purchase order	Price	Total price
Running	Normal	MacBookPro	1	Hardware	24-Aug-2022 09:25:51	Approve	£1,500.00	£1,500.00
Completed	High	Cables	15	Software	24-Jun-2022 12:43:39	Approve	£500.00	£1,500.00
Running	High	Bathroom Supplies	2	Other	15-Jun-2022 11:03:36	Approve	£0.00	£0.00
Running	High	Antivirus	1	Software	15-Jun-2022 07:42:38		£0.00	£0.00
Running	Normal	Keyboard	1	Other	15-Jun-2022 06:50:46		£20.00	£20.00
Running	High	Office licenses	2	Software	26-May-2022 07:53:14	Approve	£50.00	£100.00
Cancelled	High	Antivirus	2	Software	08-Apr-2022 11:52:13	Approve	£150.00	£300.00
Completed	High	Headphones Sony XT-2	2	Hardware	05-Apr-2022 11:58:18	Approve	£30.00	£60.00
Completed	Normal	Laptop	1	Hardware	07-Feb-2022 10:39:32	Approve	£150.00	£150.00
Running	Normal	laptop	1		27-Jan-2022 15:46:09		£500.00	£500.00
Confirmed	Normal	Mouse	1		18-Jan-2022 10:26:17		£25.00	£25.00
Running	Normal	Antivirus	2		11-Jan-2022 08:56:41		£50.00	£100.00

Other actions:

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

You can find the app under **packages>custom apps** or **under the category** you defined through the app designer basic info.

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Thank you!