



EMC manual

Activities module

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1 Documentation overview

1.1 Change history

Version	Date	Changes	Chapter	Pages
1	17.06.2009	New document	—	—

1.2 Before you begin

1.2.1 Copyright

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2 Introduction

2.1 Possible applications

Services are an integral component of all customer proposals submitted by BT BAU. The range of services includes commissioning work for building automation and control systems, repair and maintenance work and remote services.

The various kinds of work all have in common that the documentation of the work is a key aspect along with the provision of the work itself. This applies in particular, of course, to all activities that are initiated and/or performed by remote access. In such cases, the customer often only becomes aware that the activity has been carried out by means of documentation to this effect.

The activities module supports the efficient documentation of a wide variety of activities – regardless of whether insights are documented or if they are to be forwarded directly to a technician for implementation. The module provides a complete process with the corresponding user rights.

2.2 Work flow

The following two applications can be distinguished for use of the module:

- Use in a team (different parties involved in an activity)
- Use without a team (one person involved in an activity)

Both cases can be combined in any way in customer projects.

The use of the module is supported in the two cases by means of the following:

- Integrated work flow with defined states
- User rights
- Notifications based on e-mail and SMS
- Reminder function based on e-mail and SMS
- User-specific adaptation of the user interface
- Freely definable and standard filters possible
- Integrated component of the EMC platform

Activities are created, processed and tracked directly in the module. EMC also presents an option to output activities in the form of reports. This enables, for example, customer users to quickly obtain an overview of the services that have been provided.

3 Work flow and user rights

3.1 Owners and users with responsibility

Activities always have an owner and someone responsible for them. One or more users can fulfill these roles.

- Only users from the operator group can be **owners**. Only operators can create and close activities.
- The **user** entered as **responsible** is responsible for further processing of the activity in the state "open".

At any point in time, an activity has only one owner and one user with responsibility. Responsibility can be transferred as can ownership.

Both entered users are informed on the state of the activity. The notification is issued by e-mail.

There is also the option of notification by SMS (text messaging).

If an activity is marked with a date due, a reminder function is also provided.

3.2 Work flow and notifications

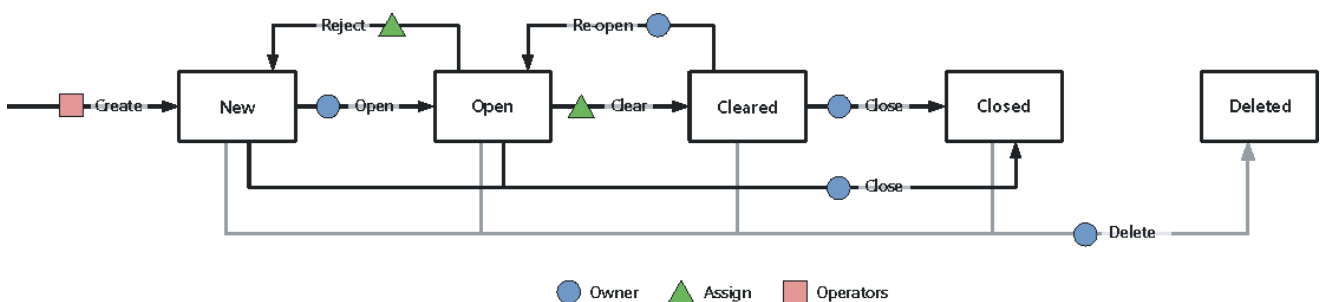
The work flow implemented in the module enables the following:

- Clear assignment of specific user rights to an activity
- Efficient overview of the progress of the activities.

The work process defines the following states for activities:

- New
- Open
- Cleared
- Closed
- Deleted



Activities can only pass through the different states according to the following specific sequence:



States and Notifications

Function	New	Open	Cleared	Closed	Deleted
● Owner	Reminder (if activated); message if rejected	Reminder (if activated)	Reminder (if activated); notification once cleared (completed)	—	—
▲ Responsible	—	Reminder (if activated); notification if opened or reopened by owner.	—	Notification if closed by owner and state was not "New".	Notification if deleted by owner and state was not "New".

Note

-  Notifications are only sent to the owner and to the persons with responsibility. Operators who create an activity are regarded as owners of the corresponding activity.
-  Activities can only be deleted under certain conditions. For tracking and history functions it is not possible to remove activities and their contents from the server. Activities are set to the state "Deleted" as a result of the delete function. They then no longer appear in the module, but can be documented if required.

3.3 User rights

The activities module is only available to company users. The following user groups have access to the application:

- Country administrators / deputies
- Operators
- Technicians
- Sales staff

Other users can only represent activities by means of reports.

Overview of user rights

Function	New	Open	Cleared	Closed	Deleted
● Owner	Can edit all fields	Can edit all fields	Can edit all fields	Can edit all fields	Read only
▲ Responsible	Read only	Can reject, clear and assign, edit contract and equipment numbers, quality, nodes, reminders and file attachments, add comments	Read only	Read only	Read only
■ Operators	Read only; can add comments; accept ownership	Read only; can add comments; accept ownership	Read only; can add comments; accept ownership	Read only; can add remarks; accept ownership	Read only
◻ Others	Read only; can add/edit comments	Read only; can add/edit comments	Read only; can add/edit comments	Read only; can add/edit comments	Read only

4 Installation

The **Activities** module is automatically available to all EMC users at the company. The Adobe Flash Player (from Version 9) is also required for use of the module.

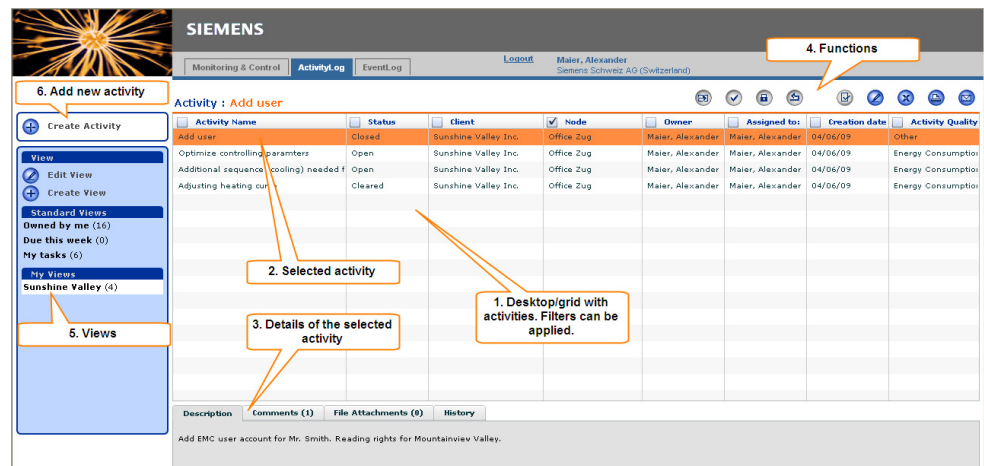
Reports for analysis of activities can be assigned to customers and users as required.

5 Operation

5.1 Layout and elements

Activities module

The **Activities** module has a dynamic user interface. Its features include automatic refreshing following new information ("push" technology) and dynamic adaptation to the user's screen resolution.



- 1. User interface**
All activities are displayed that match the current filter settings.
- 2. Selected activity**
An activity can be selected with a mouse click.
Single mouse click: Select
Double mouse click: Edit
- 3. Details**
Details on the selected activity are displayed in this area (read only).
- 4. Functions**
Depending on the state of an activity and the rights of the user, functions can be performed on the selected activity. Functions that are not available for use are displayed in gray.
- 5. Views**
For editing and applying views.
- 6. Create an activity**
Depending on the user's role, new activities can be created.

5.2 Adapting views

The view can be adapted to suit the user's requirements. For example, numerous filter and sorting options are provided. These settings can also be saved.

EMC distinguishes between standard views and user-defined views as follows:

- Standard views are provided by the system and vary according to the applicable user role.
- User-defined views can be freely created and saved.

5.2.1 Standard views

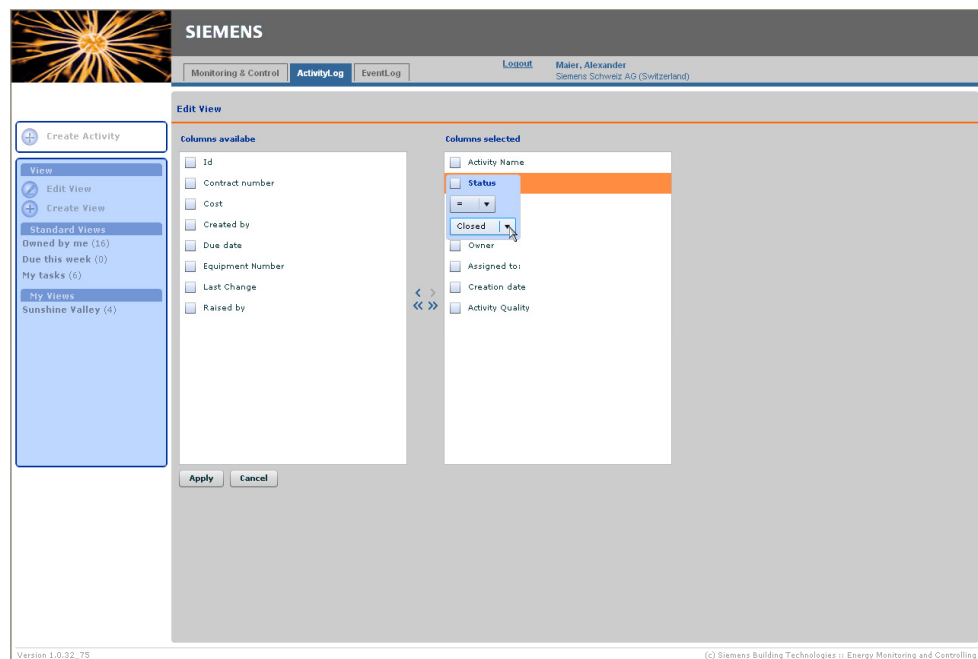
The module provides standard views to provide for a prompt overview. Filters and columns are already defined in the standard views.

The following standard views are available:

Name	Owner	Note
Owned by me	Displays all activities added by the current user.	The view is only displayed for operators.
Due this week	Displays all activities that have to be cleared by the end of the current week.	The display varies according to the state and assigned function of the user (owner/responsible).
My tasks	Displays all of the user's activities to be processed.	The display varies according to the state and assigned function of the user (owner/responsible).

5.2.2 User-defined views

User-specific views can be defined and stored in the activities module. In this way, for example, all activities for a specific customer or all activities in a particular state can be quickly accessed.



To create or edit a user-defined view, select the "Create/Edit View" function.

In the second step, select the columns that are to be displayed on the interface.

Filter criteria can then be activated. To do so, click on the checkbox for the relevant column and select the required function.

The following filter criteria (depending on the column you have selected) are provided:

- < less than
- <= less than or equal to (\leq)

- = equal to
- >= greater than or equal to (\geq)

- > greater than
- <> not equal to (\neq)

The view can be saved with the "Save View" function so that it can be recalled later. Existing user-defined views can be overwritten if required.

They can likewise be deleted. To do so, activate the X symbol beside the name of the user view (navigate with the mouse over the name).

6 Creating and editing activities

6.1 Creating activities

Chapter 3.1 "Owners and users with responsibility" describes what user roles can create activities.

To create an activity, select the "Create Activity" function.

Input mask

The properties of the activity can be entered in the input mask. Mandatory fields for user input are marked with an asterisk (*).

Important



- Node selection: Activities must be assigned to a customer or node in the EMC structure. All customers/nodes assigned to the user are available.
- Contract number/equipment number: These properties can be created in the EMC country administrator function for customers. Depending on the customer/node selection, the corresponding contract/equipment numbers are provided for selection.

An activity cannot be saved until all mandatory fields have been filled in.

To enter comments and file attachments, select the corresponding tab on the right side of the screen.

An activity is always created with the state "New". To then release the activity for the work flow (by changing its state to "Open"), click on the corresponding function on the top right margin of the screen in the working view.

6.2 Editing activities

Depending on the applicable user rights, the user can edit different fields. This also varies according to the function of the user (owner, responsible, no assignment). Changes are logged in the history of the activity.

Changes to an activity are only applied once the activity is saved. This applies also in particular to file attachments. If a file is uploaded for an activity, the activity must be saved. Otherwise, the file will not be linked with the activity.

6.3 Recurring activities

Activities that recur regularly can also be created.

For an activity to be able to recur, it must first acquire each state in the standard way. Once an activity reaches the state "Closed" it is automatically reset to "Open".

The basic requirement for input of a recurring period is the entry of a due date.

Following setting of the state "Closed", the following takes place:

- The state changes to "Open"
- The new due date is then set to the previous due date plus the recurring period

If a recurring activity is to be closed for good, the "Recurring Period" field must be set to "None".

7 Reports

Activities can be output in EMC reports.

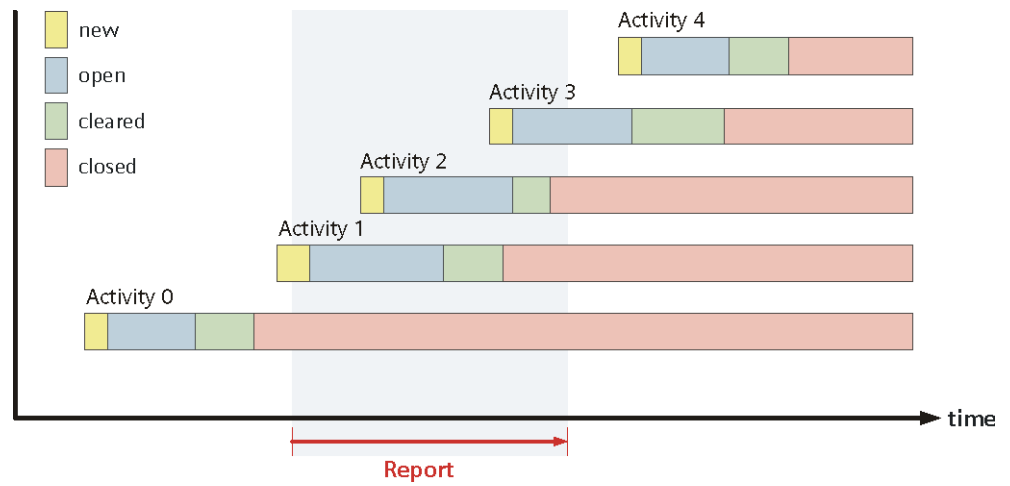
In doing so, the state of the activities can be used as a filter criterion. If different filter criteria are selected when requesting a report, all activities matching at least one of the criteria are output.

The appendix contains examples in regard to this topic.

Appendix

Example of a report request

Activities are created in EMC as shown below and are to be output in a report.



The table below shows what activities are output in relation to the selected filter criteria.

		Activated filter for report request			
		New	Open	Cleared	Closed
Output in report	Activity				
	A4	–	–	–	–
	A3	X	X	–	–
	A2	X	X	X	X
	A1	–	X	X	X
A0	–	–	–	–	

– No entry
X State

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