International Transport Forum (ITF)

Manual for Haulier Manger

ECMT Transport Licences System

Document Version: D_ECMT_TLS_MHM-001 ● June 14, 2024

Document History

Description	Author	Version	Date
Created AlfaSoft template	Victoria Plugari	n/a	
Initial version created	Victoria Plugari	D_ECMT_TLS_MHM-001	May 29, 2024
Last name first name fields modification	Victoria Plugari	D_ECMT_TLS_MHM-001	June 14, 2024

Acronyms and Abbreviation

Acronym	Definition
ECMT	European Conference of Ministers of Transport
ECMT TLS	ECMT Transport Licences System
ITF	International Transport Forum
NIA	National Issuing Authority

Table of Contents

List of Figures

1   About Haulier Manager Role

Haulier (haulier manager) is an authorized by National Issuing Authority user who is authorized to act on behalf of the National Issuing Authority.

Haulier Manager is empowered by following functions in the system:

- Manages (creates, closes, suspends, reactivates) accounts for other employees of the haulier drivers.

- Uploads to the system certificates for the trucks used with the ECMT licenses

- Associates trip(s), vehicle and a driver(s) to any of the ECMT licence assigned to the haulier for any given transport operation, at a time

- Manage (creates/changes) a trip plans

- Modifies, during the trip, the planned date of arrival of the trip

- Gives driver(s) permissions to edit the attributes of trips, if applicable

- Accesses data about ECMT licences assigned to the haulier, and trips performed with those licences

- Replaces the vehicle associated with a licence with an operational vehicle in order to continue the trip in case of a road accident or vehicle damage, including the declaration of a statement confirming such accident or damage

- Has ability to see, in real time, which licences assigned to the haulier are in use and which are available for a new trip

- Generates/downloads licence and/or logbook files in pdf format

Figure 1 Haulier's workplace. "Licences" interface
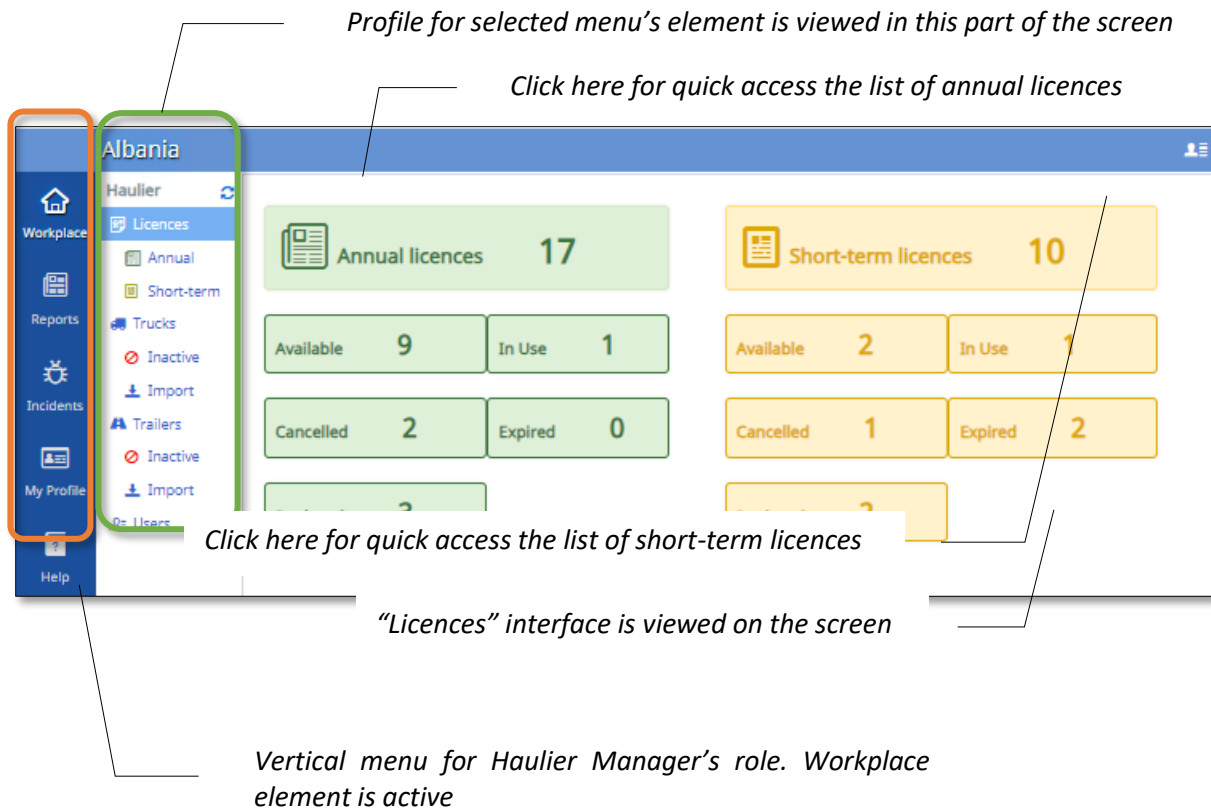
2   User's Authentication (Login / Logout)

Before starting work in the system each user has to pass login procedure. At the end of working session it is recommended to execute logout procedure for the purpose of system data safety.

2.1   How to Login the System

User account is created by administrator. To create an account any user provides his data and email address to administrator, administrator in his turn creates an account for a user and provides password for following authentication process. Once account is accessed, user can change password for safety purpose (see paragraph 6.1 below)

To pass authentication process do following:

1. Using your browser access system's electronic page.

2. In login form that will be displayed on your screen insert your email as a user name and password:

Figure 2 ECMT TLS login page

1) Provide your user name (email address) in this field

2) Provide your user password in this field

3) Press this button to finish Login procedure and to access your workplace

Use this link in situation if you forgot your user name or password
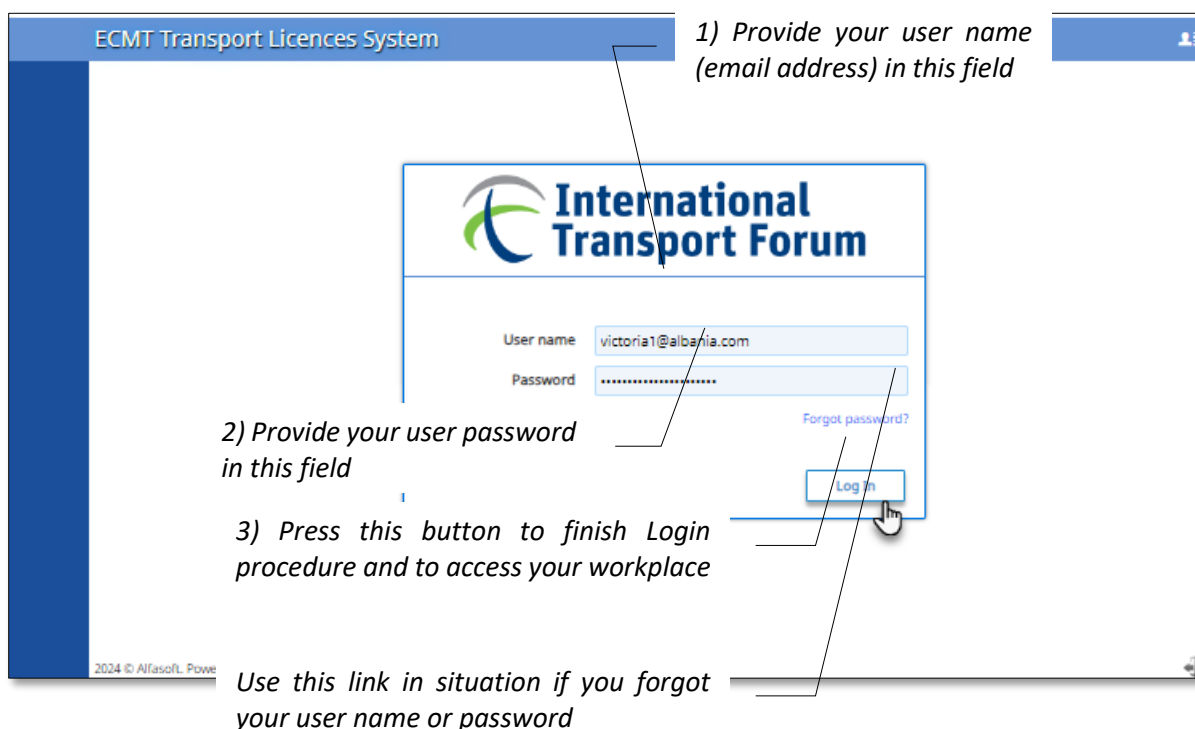
Note1: User name and password fields are sensitive for capitalization, so be sure that you enter your credentials in the way they were provided during the registration.

Note2: If you forgot your user name or password use "Forgot password?" link situated under the authentication fields.

3. Click [Log In] button.

As a result of passed steps you will be moved into your working place (see Figure 1)

2.2   How to Logout the System

Once you are done with your work in the system it is recommended to effectuate Logout procedure. In this way you will protect your workplace from outside interferences and will keep safety of the system data. To execute Logout procedure press **Logout** button in the right top corner of your workplace 💼 or same functionality button in the right down corner of your account workplace 🔳.

Figure 3 Ways to logout the system

Click these buttons to logout the system
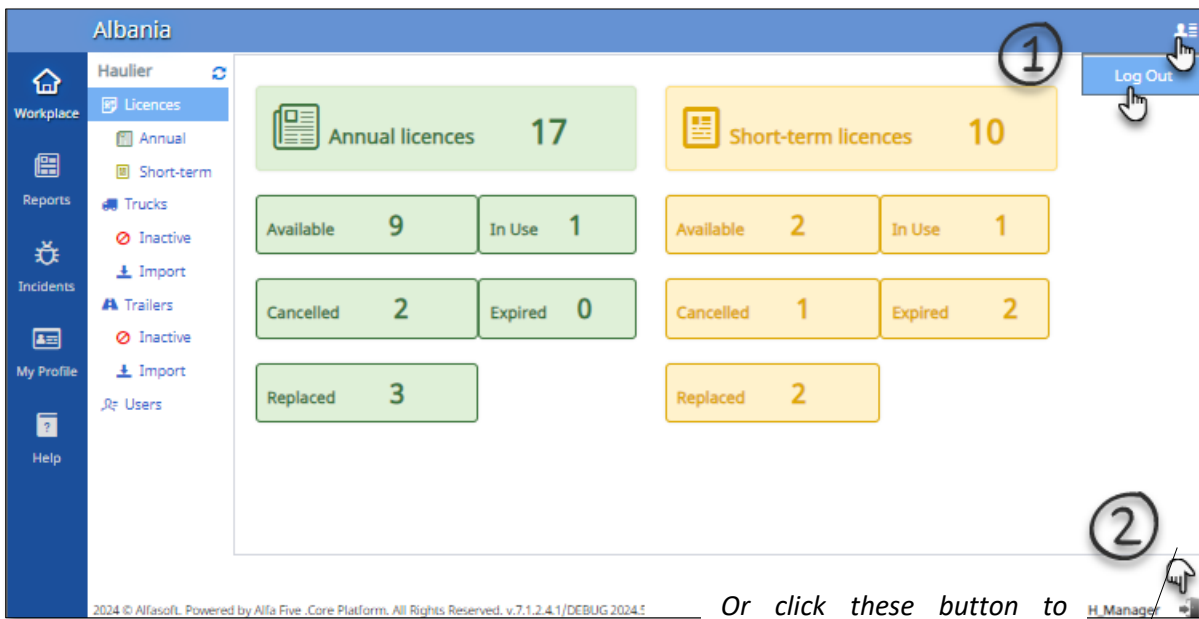
Or click these button to logout the system

3   Haulier Manager's Workplace

NIA's workplace represents a vertical profile that contains following elements:

- **Licences** – shows licences at disposal of the haulier divided by their term and current status (see Figure 1).

- **Annual licences** – list of annual licences at haulier's disposal. By default, the list is shown without records. To view the entire list or records click `Search` button, or provide search criteria and then click `Search` button to view list of annual licences records that satisfy provided search criteria:

Figure 4 Haulier Manager's workplace. Annual licences interface

- **Short-term licences** – list of short-term licences at haulier's disposal. By default, the list is shown without records. To view the entire list or records click `Search` button, or provide search criteria and then click `Search` button to view list of short-term licences records that satisfy provided search criteria:

Figure 5 Haulier Manager's workplace. Short-term licences interface
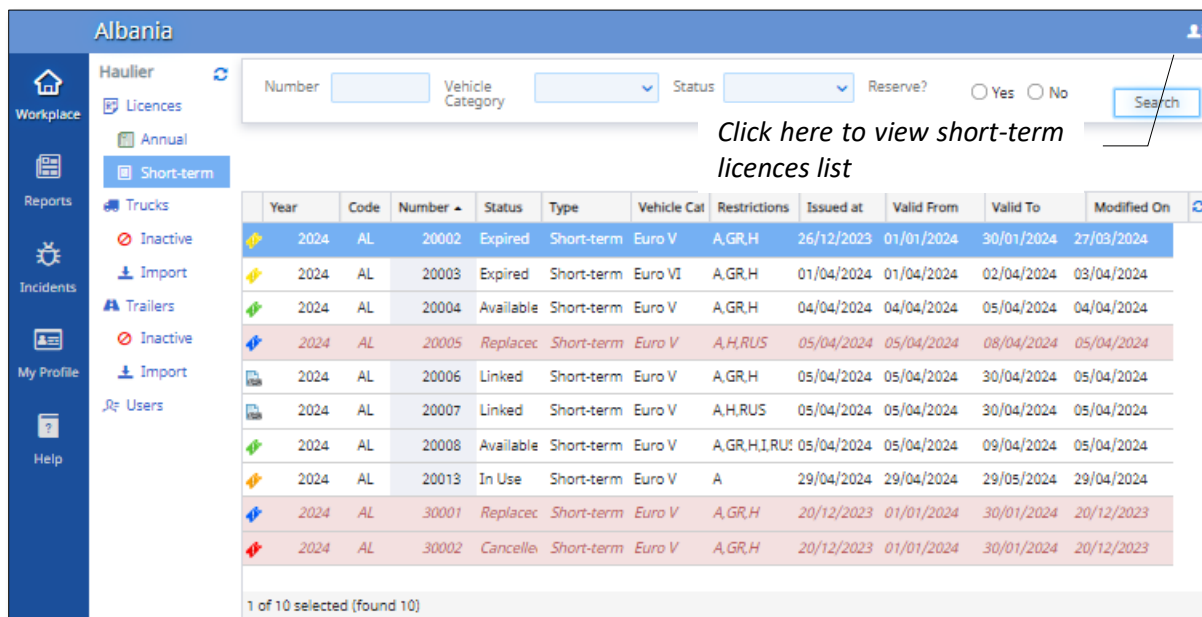
• **Tracks** – list of active tracks that belong to company. Here new trucks can be added, trucks data can be modified, truck documents can be uploaded, truck records can be inactivated:

Figure 6 Haulier Manager's workplace. Trucks interface
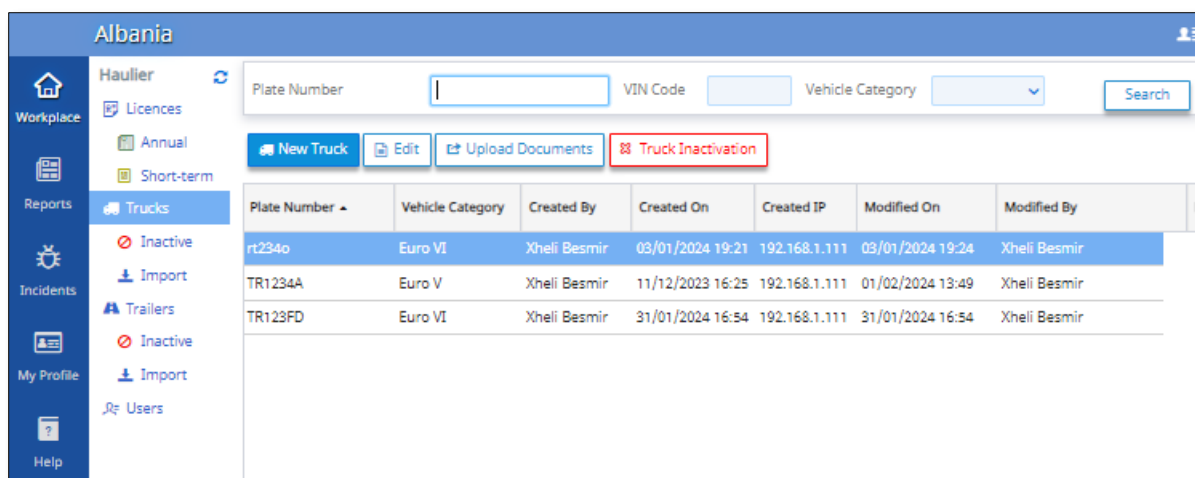
• **Inactive Trucks** – list of inactive trucks of the company. Records of inactive trucks can be activated back in case of necessity:

Figure 7 Haulier Manager's workplace. Inactive trucks interface
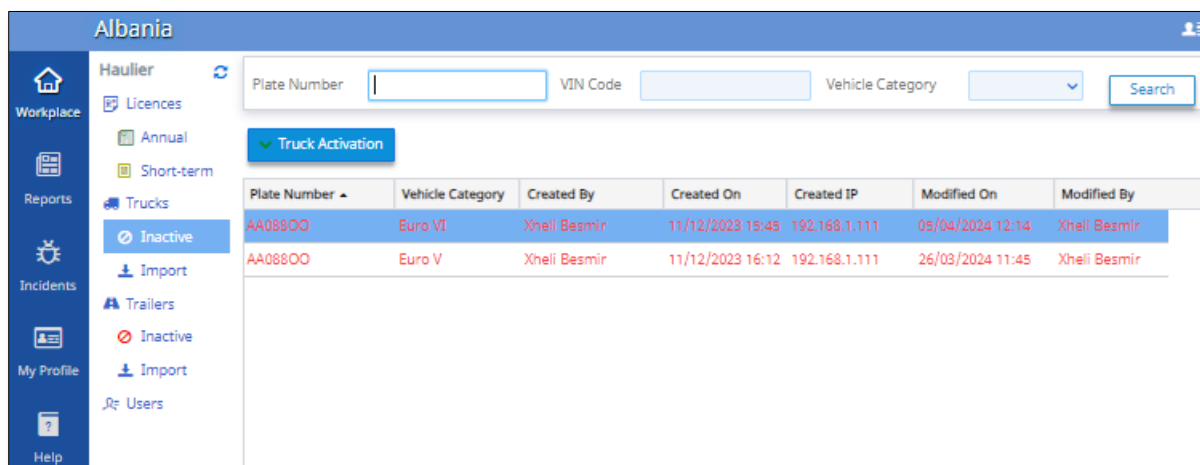
- **Trucks import** – element where truck records can be uploaded in form of a MS Excel files. Importing template file can be downloaded first for following filling:

Figure 8 Haulier Manager's workplace. Trucks import interface
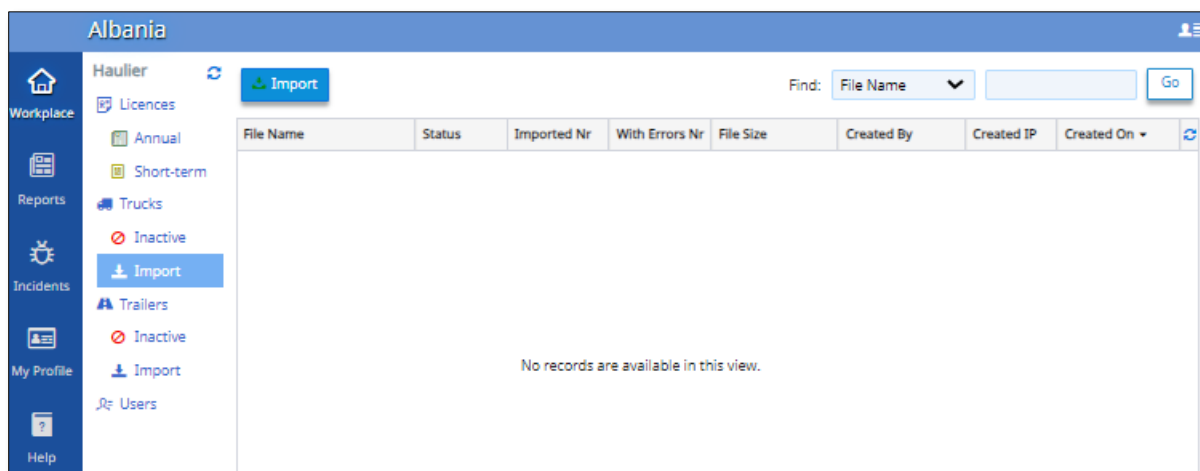
- **Trailers** – list of active trailers that belong to company. Here new trailers can be added, trailers data can be modified, trailers documents can be uploaded, trailers records can be inactivated:

Figure 9 Haulier Manager's workplace. Trailers interface
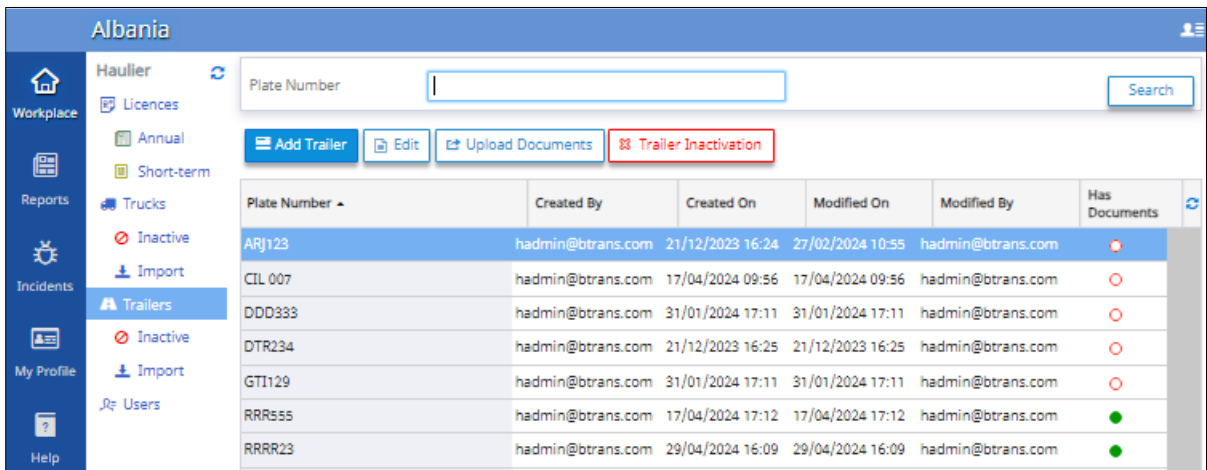
- **Inactive trailers** – list of inactive trailers of the company. Records of inactive trailers can be activated back in case of necessity:

Figure 10 Haulier Manager's workplace. Inactive trailers interface
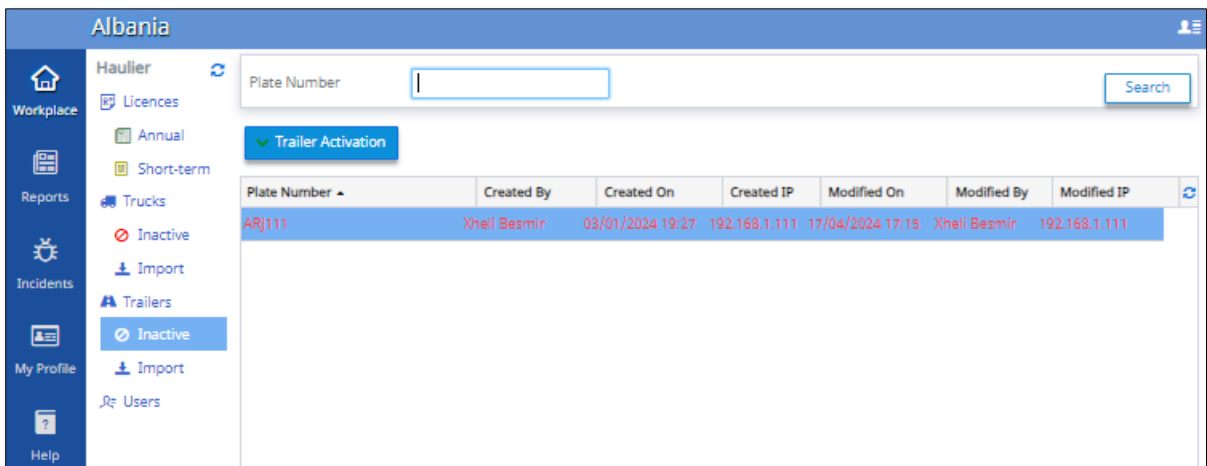
- **Trailers import** – element where trailers records can be uploaded in form of a MS Excel files. Importing template file can be downloaded first for following filling:

Figure 11 Haulier Manager's workplace. Trailers import interface
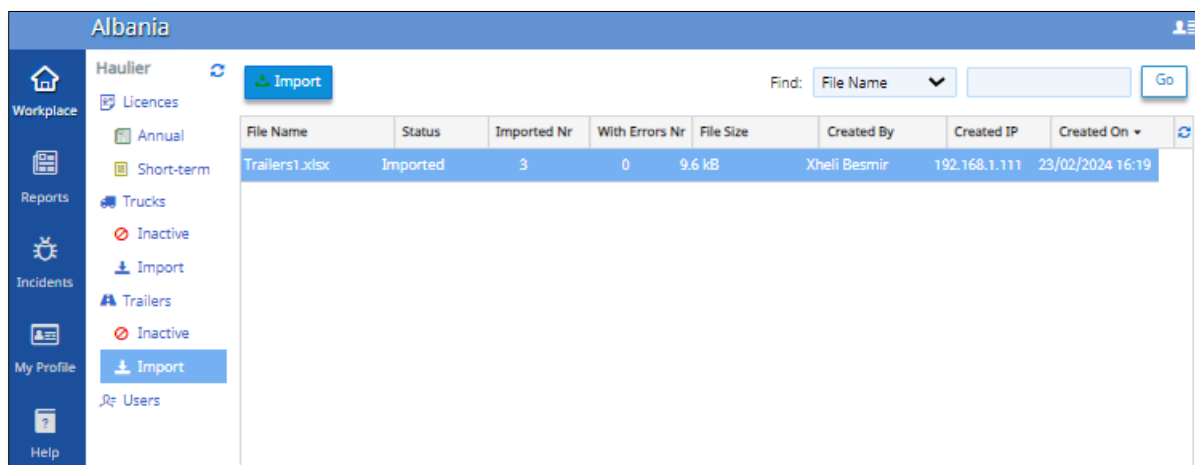
- **Users** – list of hauler's company users. Here user records can be added, their data can be modified, user passwords can be changed:

Figure 12 Haulier Manager's workplace. Users interface
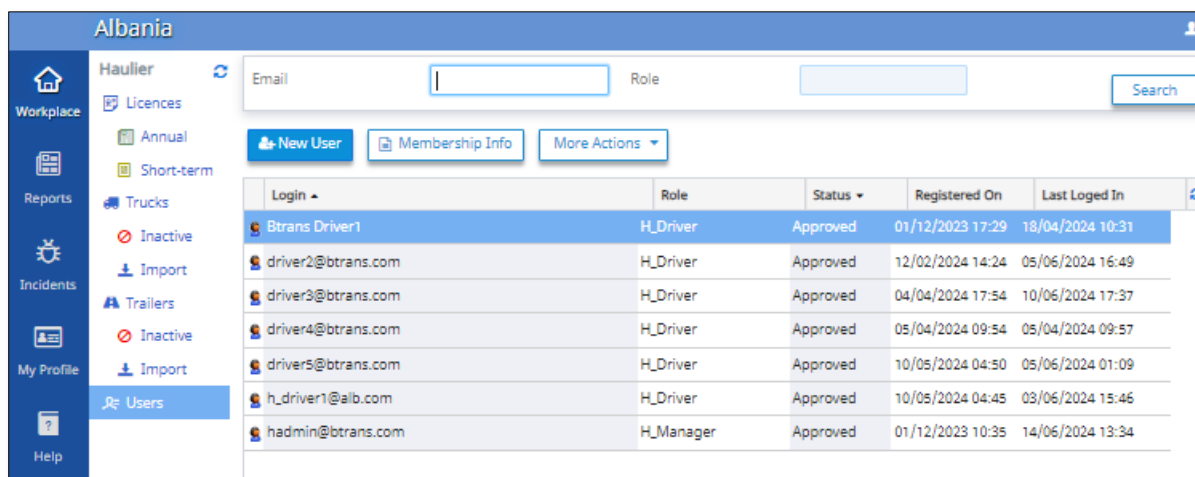
3.1   Licence Management

3.1.1   How to Get Licence Info According to Its Status

Licence status shows stage of its life cycle in the system. Licences can get following statuses:

Available – a licence that has been issued to a haulier and is available for its use (is not used in none of hauliers trips at the current moment of time).

In use – a licence that has been issued to a haulier and is in use for a moment. One licence can be used for one trip at once. If licence is in use for a trip, it can't be used for another trip.

Cancelled – a licence that has been issued to a haulier but has been cancelled due to some reasons (for instance: haulier stopped its activity, haulier doesn't respect stipulated licence usage agreement, etc.) Cancelled licences can't be reused, but they can be replaced from a reserved stock of licences.

Replaced – a licence that has been replaced after its cancellation. Actually licence replacement means its repeated activation for another haulier.

Expired – a licence that has been issued to a haulier, which term of usage has been expired.

Linked – a licence issued to a haulier, linked to a trip where it will be used right after a licence with expiring term of usage (in case when trip duration exceed expiring licence time limits).

3.1.2   How to View Licences in Accordance with Specified Parameters

By default, list of annual and short term licences are viewed without records.

Figure 13 Annual licences interface viewed in default mode
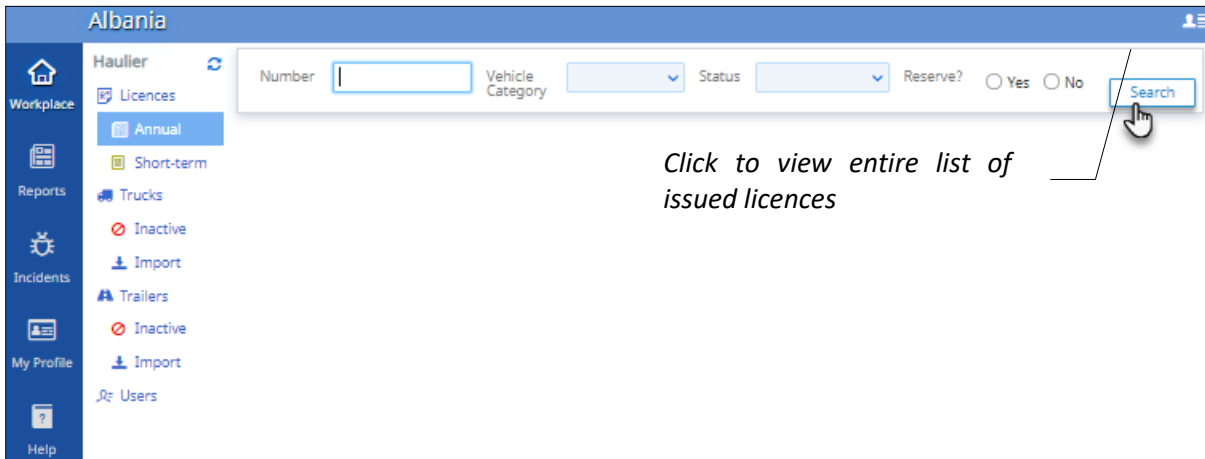
You can click [Search] button without providing search criteria in case you want to view the entire licence list.

Or

You can provide search criteria using search form in the upper part of the list and click [Search] button: thus you'll see the list of only those licence records that satisfy providing search criteria:

Figure 14 Annual licences list viewed in accordance with providing search criteria
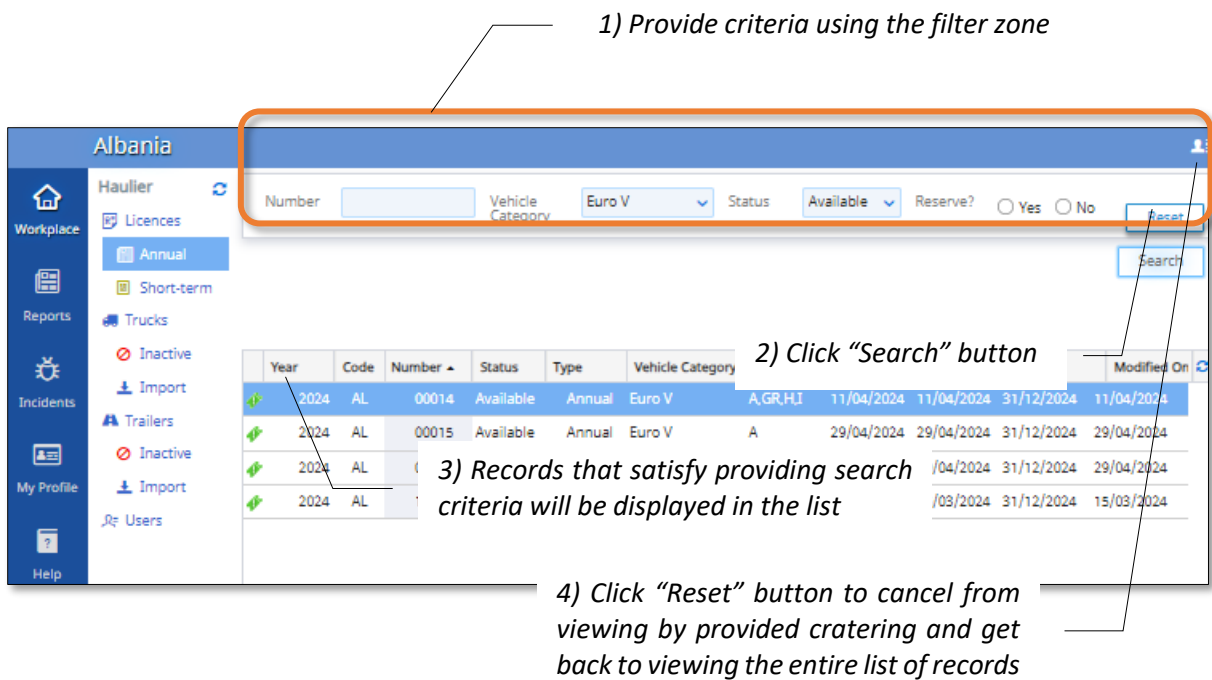
3.1.3   How to Get Licence Info from Licence Form

To view licence form double-click its record from the list of annual or short-term licences. Licence form is composed from three tabs (inlays):

Info tab – shows licence current status and licence general info. Also here you can view licence document and logbook document in PDF viewer interface:

Figure 15 Licence form. Info tab
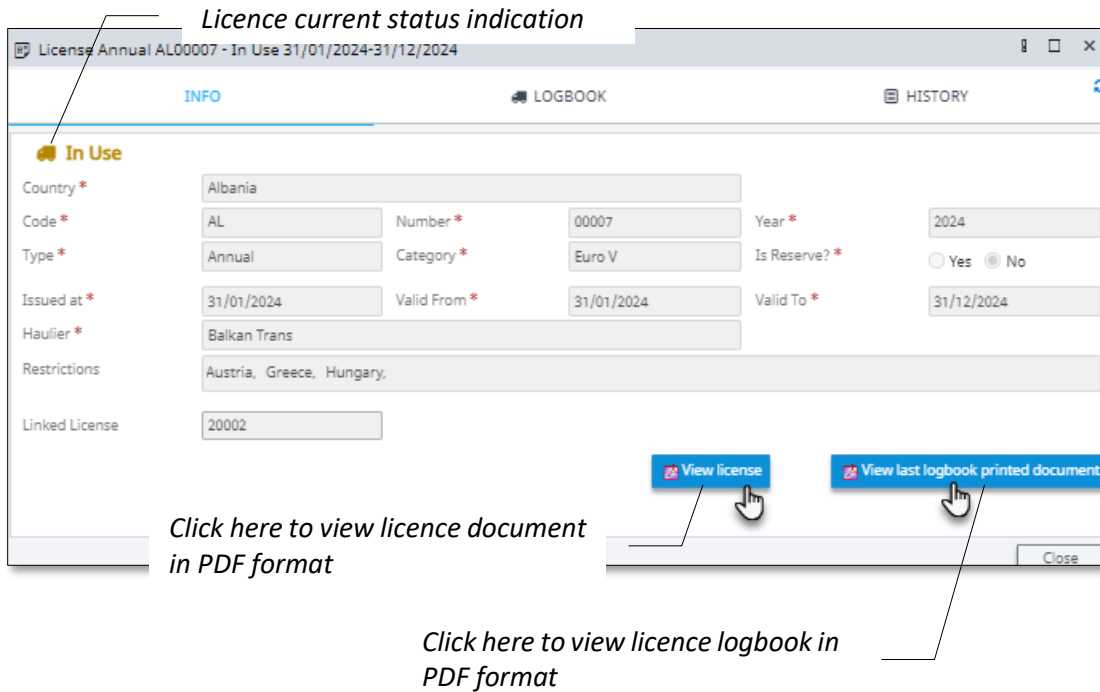
Figure 16 Licence document in PDF viewer
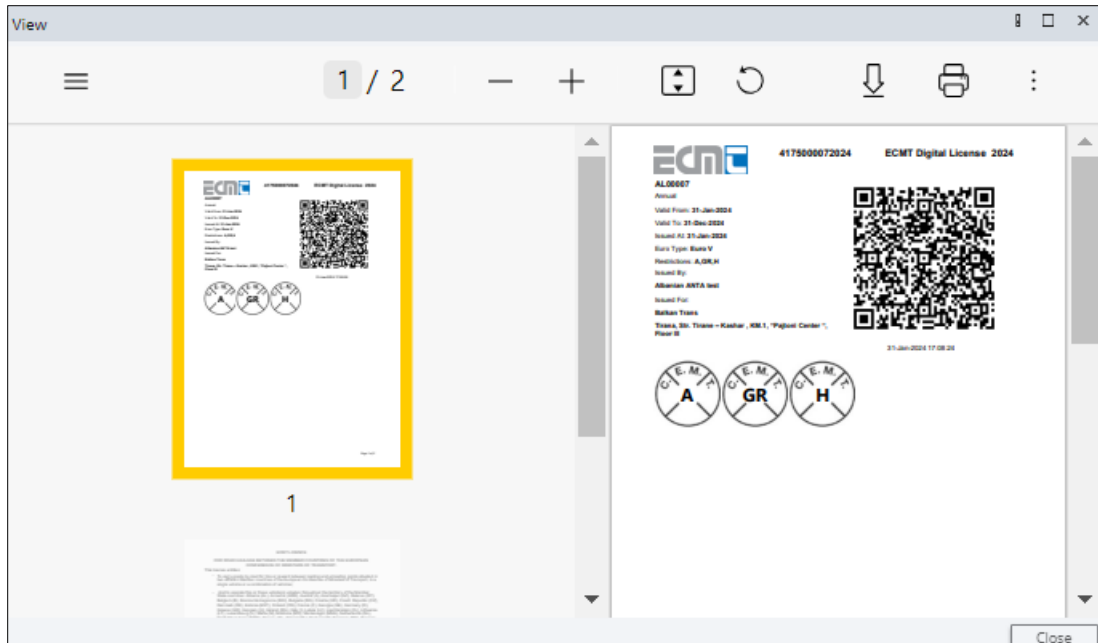
Figure 17 Licence logbook in PDF viewer form
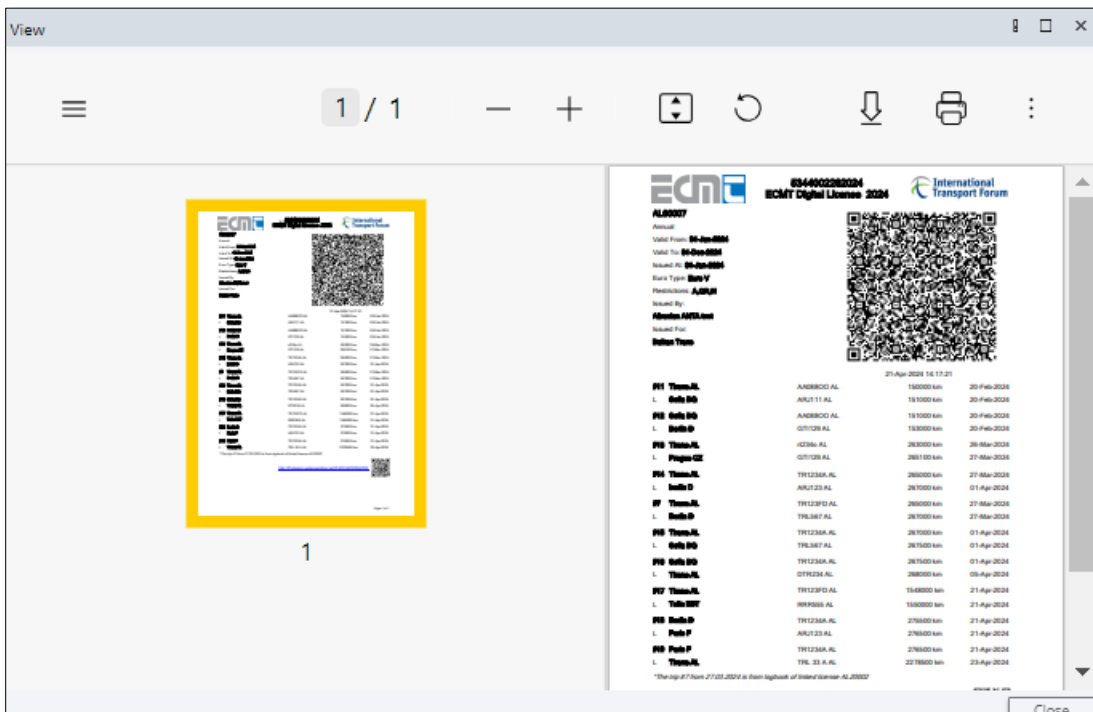
Logbook tab – contains information about all trips that have been executed using the licence. Here you can start new trip for a licence (new trip can be started only when licence has "available" status), add steps and actions for a current trip, view steps data, finish current trip

Figure 18 Licence form. Logbook tab

When licence is in use new trip can't be activated (created)
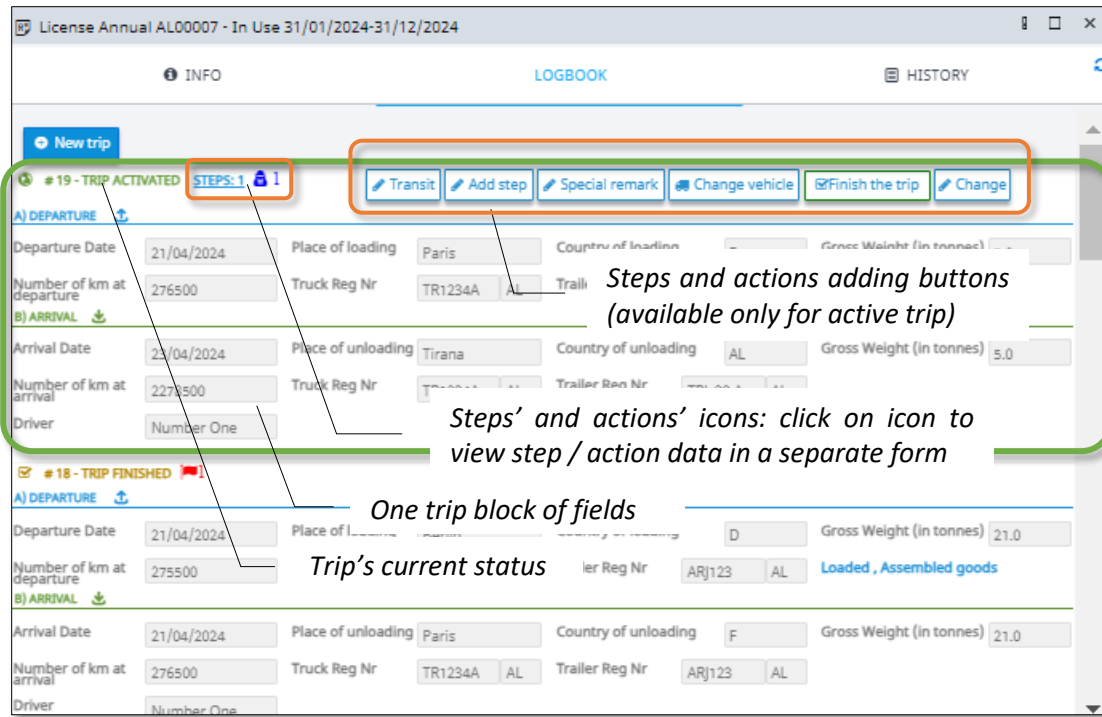
Note: Step adding is available for annual licences only

Figure 19 Action's form

Figure 20 Steps form

History tab – shows list of records about licence status change and serves for information purpose only.

Figure 21 Licence form. History tab

3.1.4   How to Activate New Trip for a Licence

In licence form that has "available" status go to Logbook tab and click ⊕ New trip button:

Figure 22 Start of new trip activation process
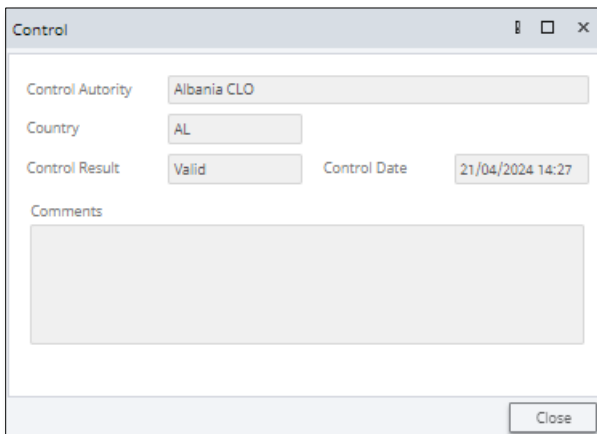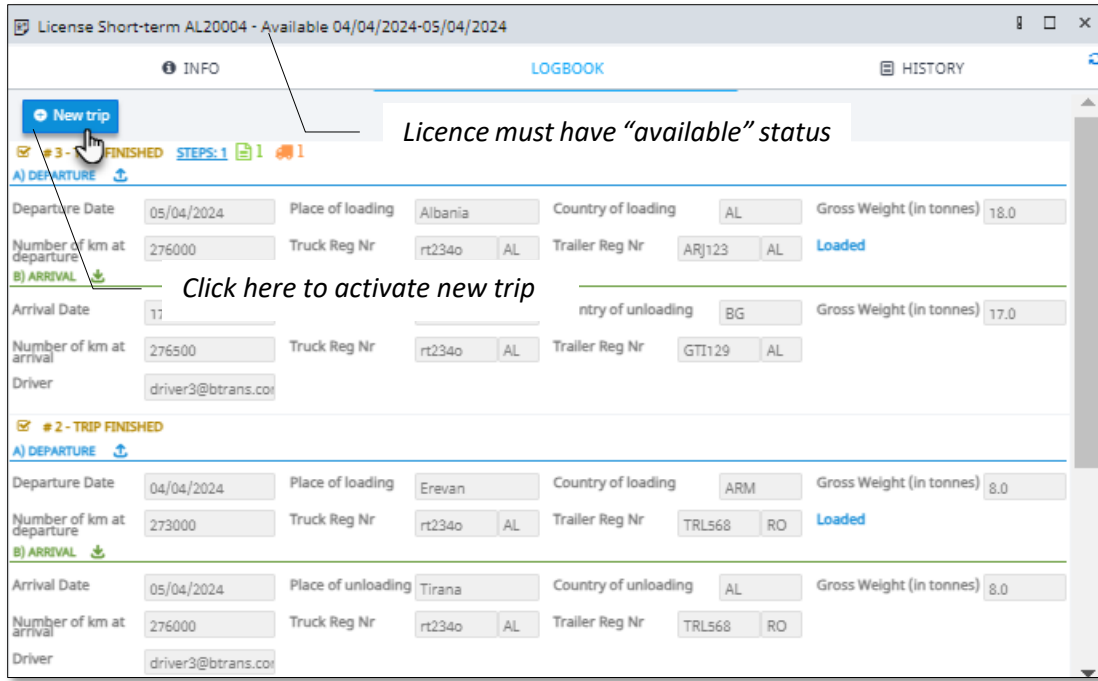
In new trip form that will be opened select driver, information about departure (departure date, place and country of loading, weight that is going to be hauled, truck and trailer registration number, number of km at departure); information about arrival (arrival date, place and country of unloading, etc.):

Figure 23 New trip activation form
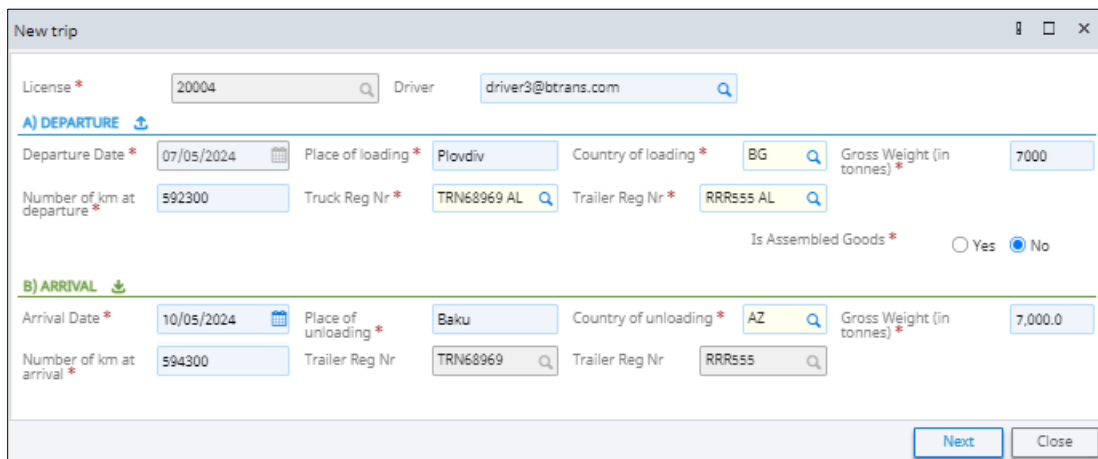
Click Next button: new trip activation form will be closed, activated trip's block of fields will be available in licence logbook. Licence status will be changed from "Available" to "In use":

Figure 24 Active trip block of fields in licence logbook
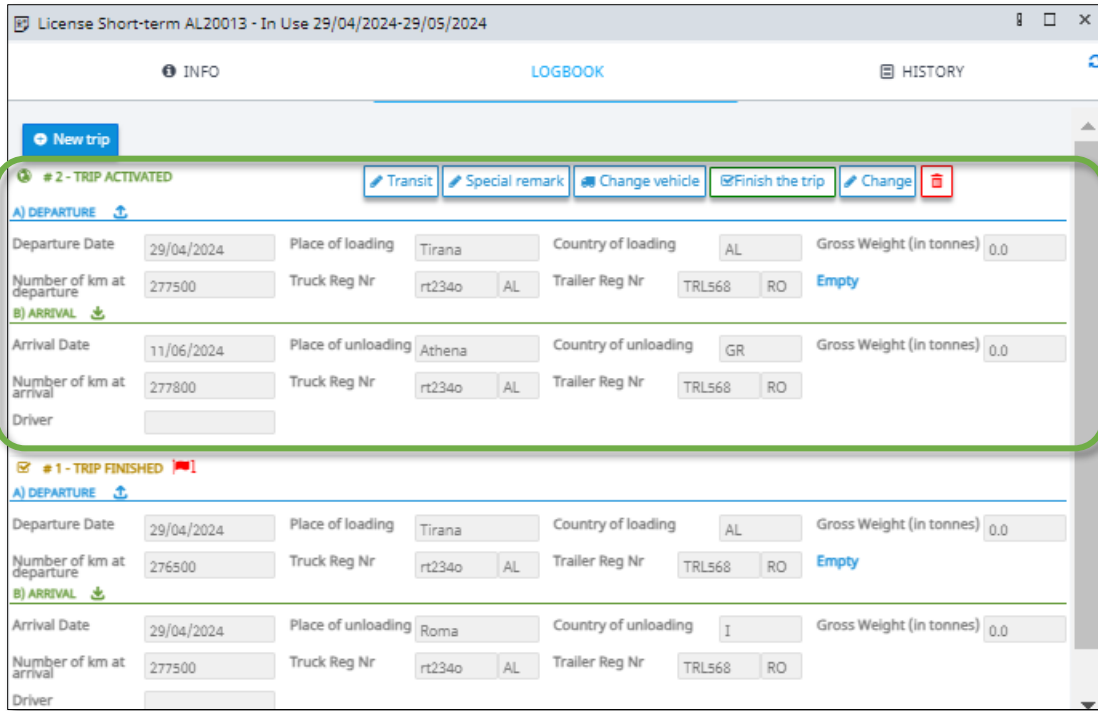
Note: In situation when arrival date is greater than licence valid date "link licence" button is going to be available. Click [Link licence] button and select licence number from available licence list:

Figure 25 Link licence step on new trip activation
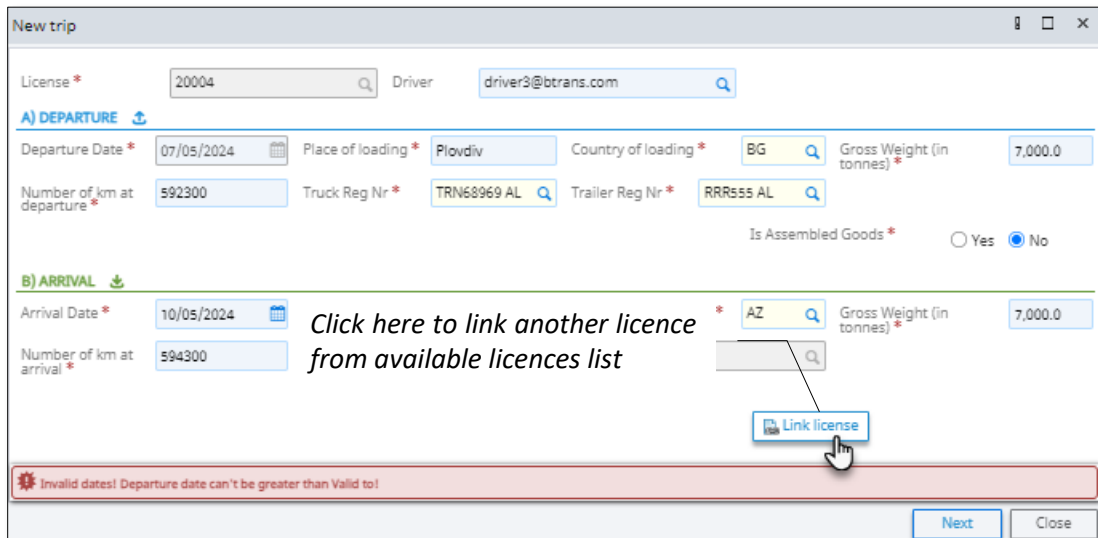
Figure 26 Lookup for available licence selection
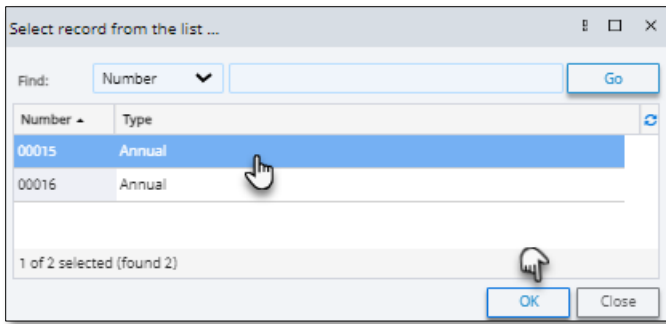
Figure 27 Message on successful licence link
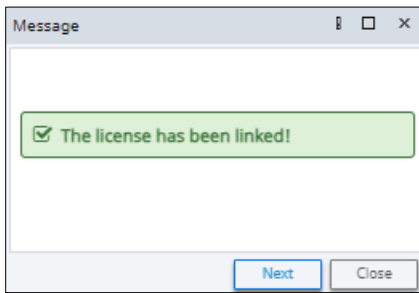
3.1.5   How to Add Transit Point to a Trip

In active trip section in licence logbook click [✎ Transit] button:

Figure 28 Start of transit point addition
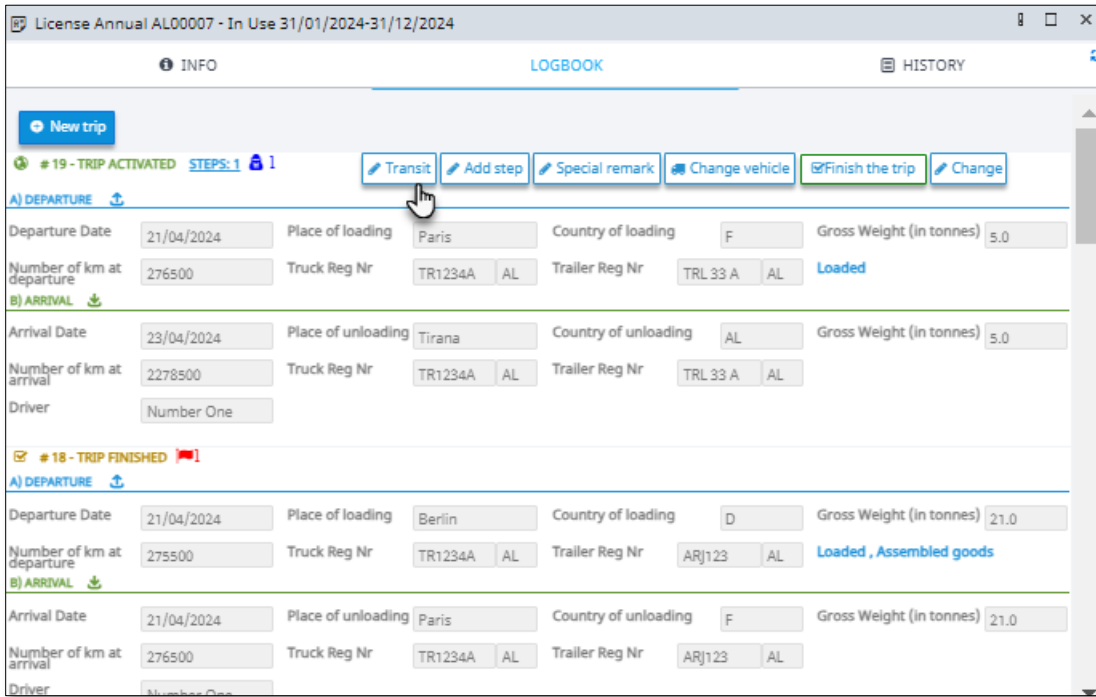
In form that will be opened select date of transit, place and country of transit, number of km that have been passed:

Figure 29 Transit point addition form
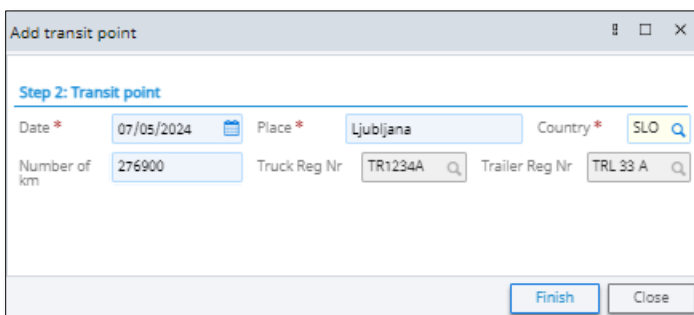
Click [Finish] button: "Add transit point" form will be closed, step button will be displayed in active trip section:
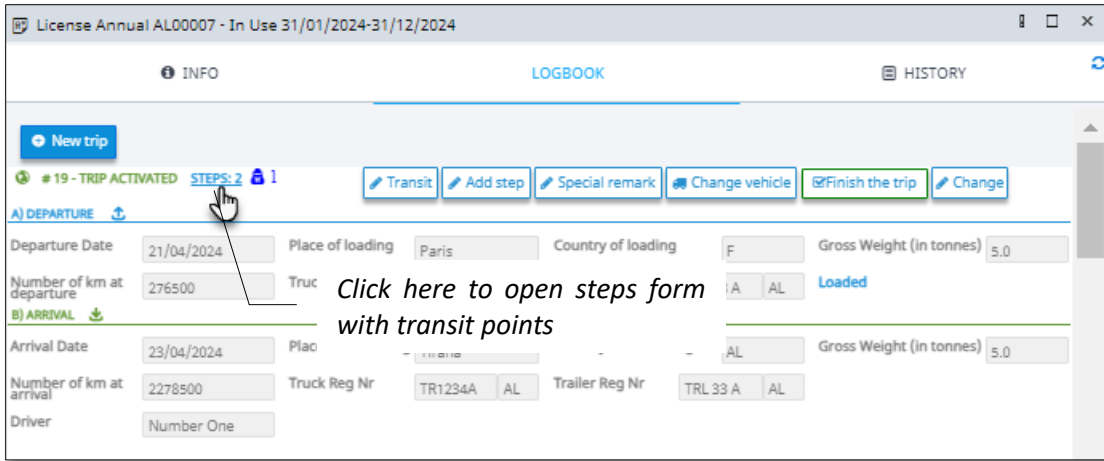
Figure 30 Steps form with transit points
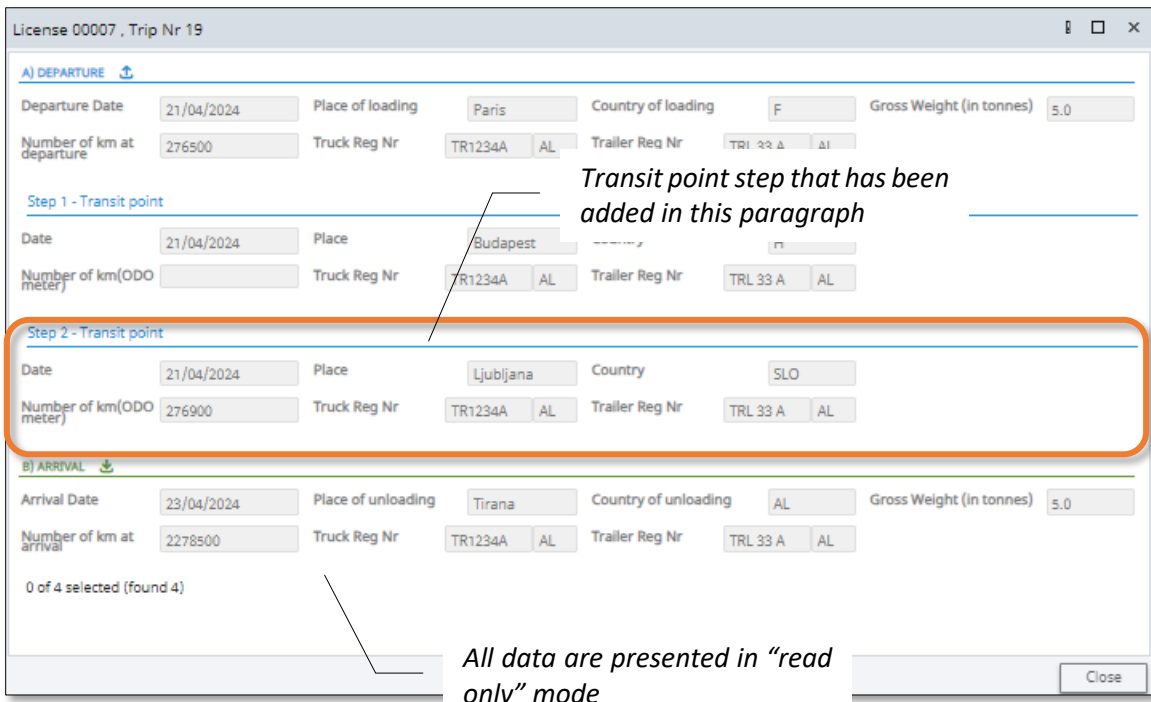
3.1.6   How to Add a Step to a Trip

Steps can be added to annual licences logbooks. Trip steps can be described as intermediate stop points when trip gross weight is added or reduced.

In active trip section in licence logbook click [✎ Add step] button:

Figure 31 "Add step" process start
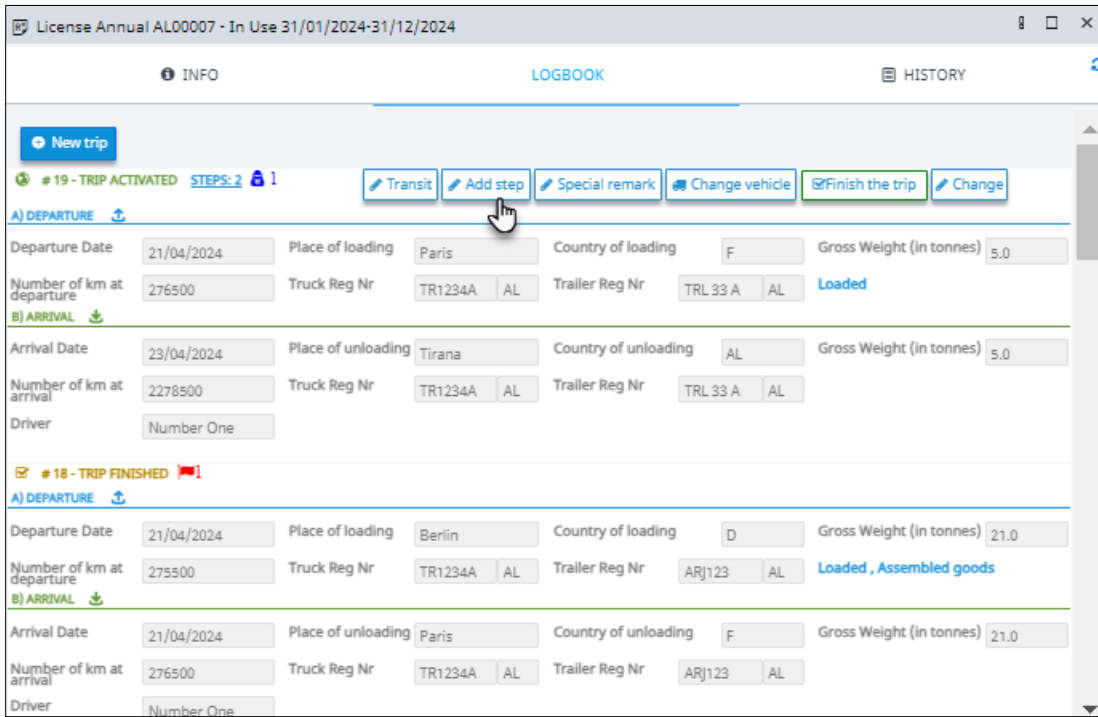
In form that will be opened provide date, country and place of the trip step, weight change resulting after the stop:

Figure 32 Trip step adding form
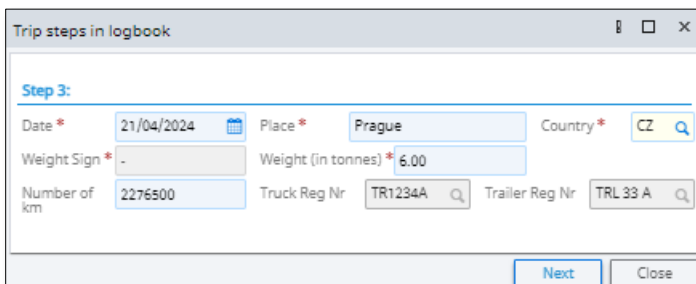
Click [Next] button: trip step form will be closed, step icon will be viewed in trip's section in licence logbook. In case to a trip have been added more than one steps, the total step number will be displayed near the step icon.
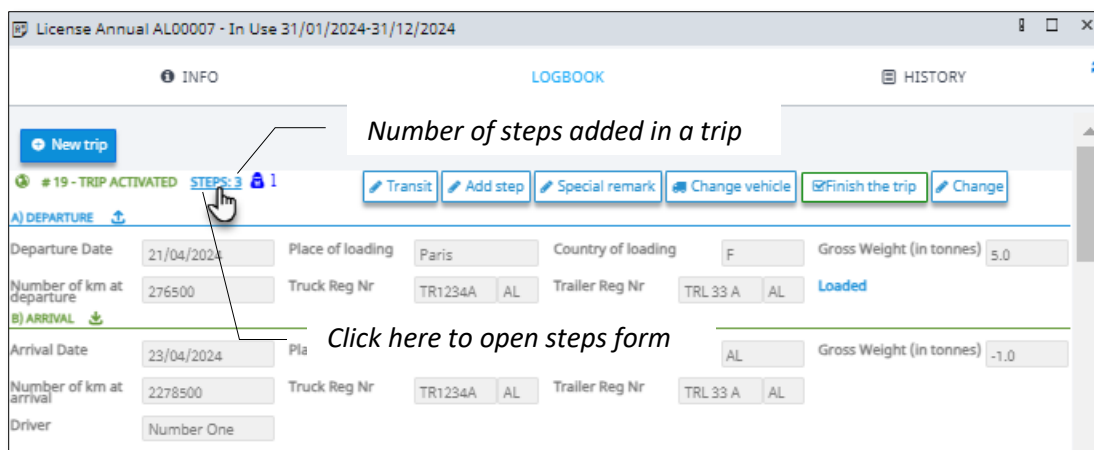
3.1.7   How to Add Special Remark to a Trip

In block of active trip in Licence Logbook click [Special remark] button:

Figure 33 Start of special remark adding process
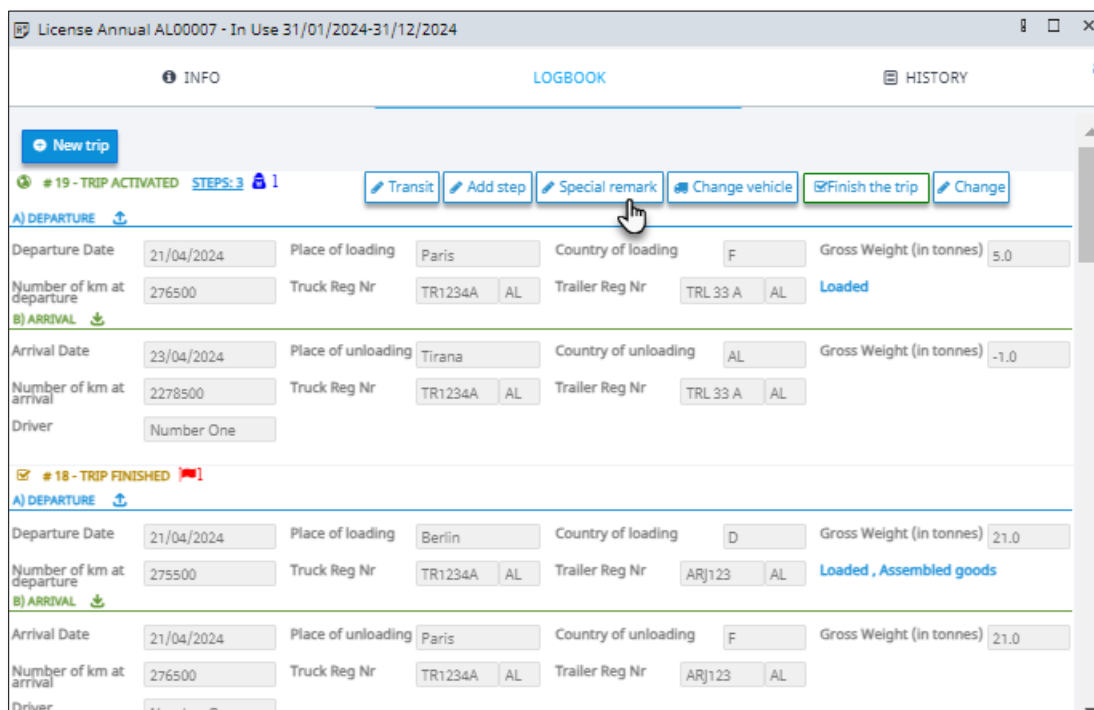
In form that will be displayed provide remark's text in a provided field:

Figure 34 Special remark form

Click [Finish] button: remark form will be closed and remark icon will be displayed in active trip section:

Click here to open remarks form

Figure 35 Viewing the list of added special remarks after adding them to active trip

3.1.8   How to Change Vehicle / Trailer for a Trip

In block of active trip in Licence Logbook click [✏ Special remark] button:

Figure 36 Start of change vehicle / trailer process
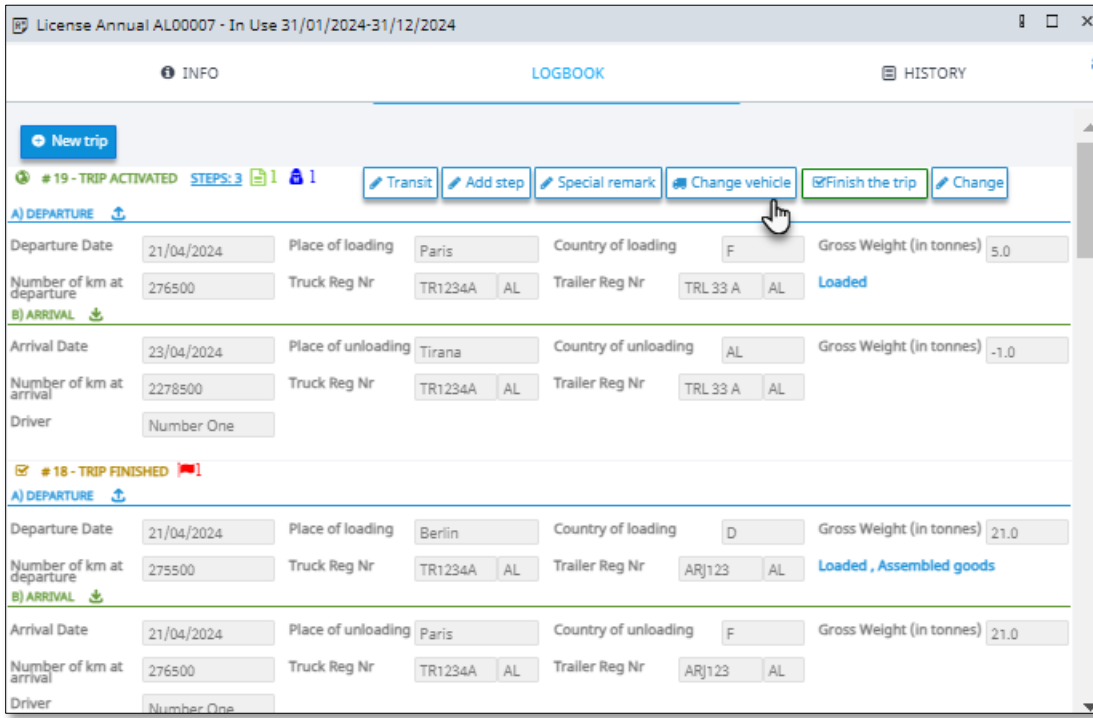
In form that will be displayed select what would you like to change: vehicle, trailer or vehicle and trailer at the same time:

Figure 37 Change vehicle form (first step)
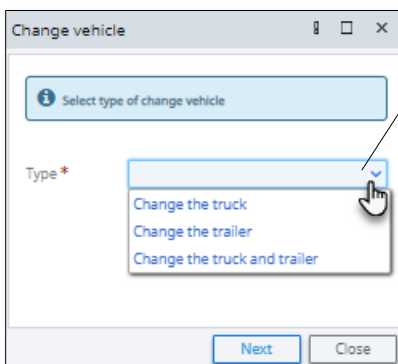
Click here and select option for changing

Click [Next] button: depending on selected option during the previous step, fill in the second step of the changing form:

Figure 38 Change vehicle form (second step. "Change trailer" case)

Select another trailer from the lookup grid

Click here to add attachment document stored on your hard disk

Leave a comment about vehicle / trailer changing

Click [Finish] button: confirmation messages will be displayed on your screen:

Figure 39 Confirmation messages forms on vehicle / trailer change

Click [Confirm] → [Close] buttons: confirmation messages will be closed and "change vehicle" icon will be displayed in active trip section:

Click here to view all data about vehicle / trailer changes in "Change vehicle" form

3.1.9 How to Change the Date, Number of KM, Country or Place of Arrival for a Trip

In block of active trip in Licence Logbook click [✏ Change] button:

Figure 40 Start of change trip parameters process
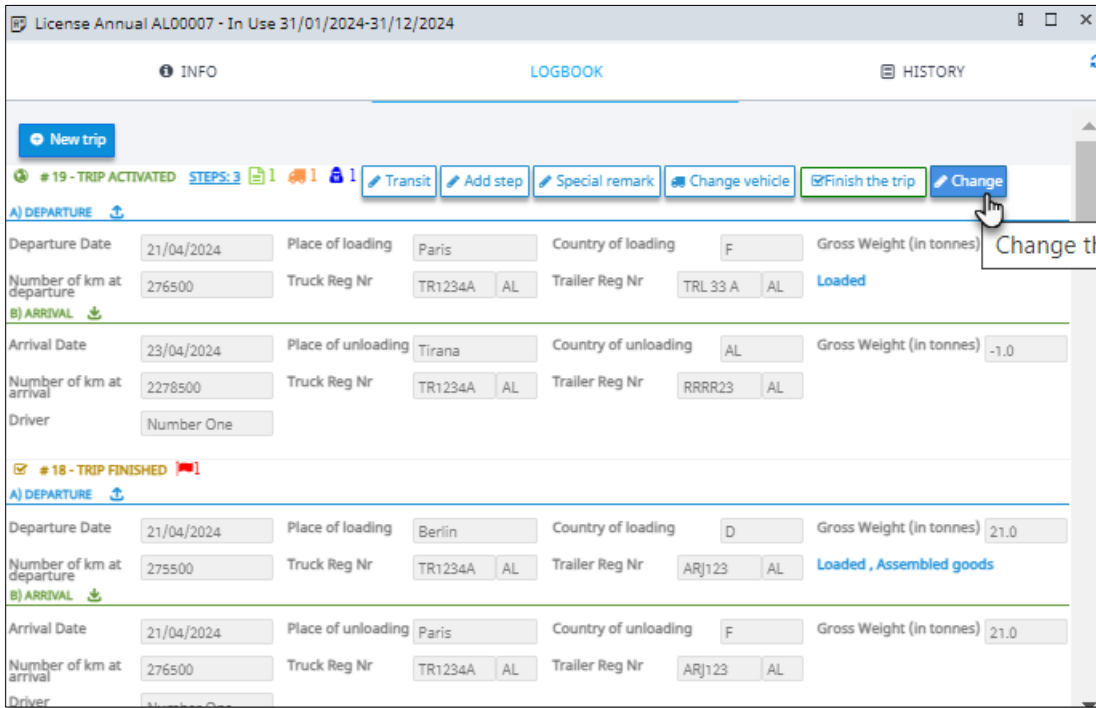
In form that will be opened use "Arrival" section to make changes in trip's data:

Figure 41 "Change the date, number of km, country or place of arrival" form
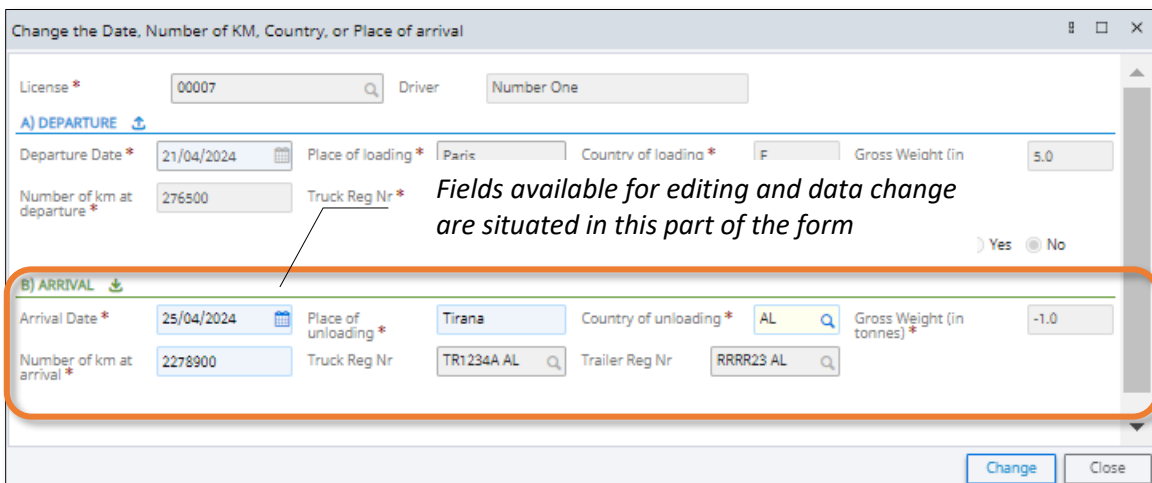
After all changes are done click [Change] button: form will be closed, modification will be saved

3.1.10   How to Finish the Trip

In block of active trip in Licence Logbook click ⌷Finish the trip button:

Figure 42 Start of "finish the trip" process
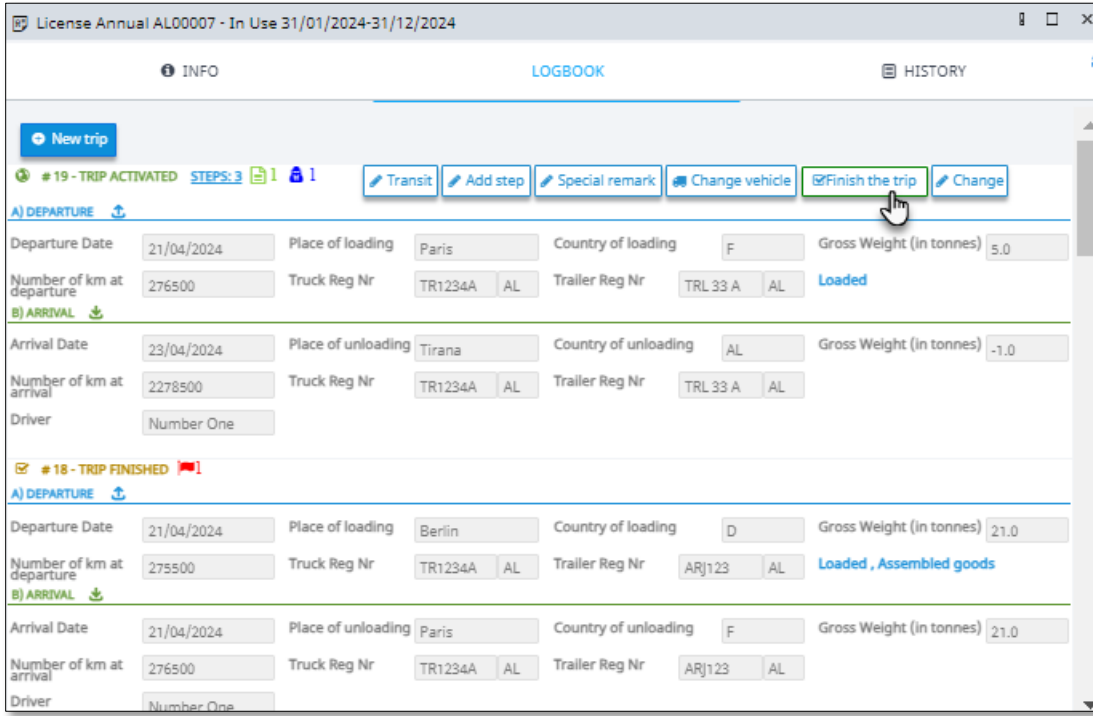
You'll see the form with trip general info:

Figure 43 finish the trip form
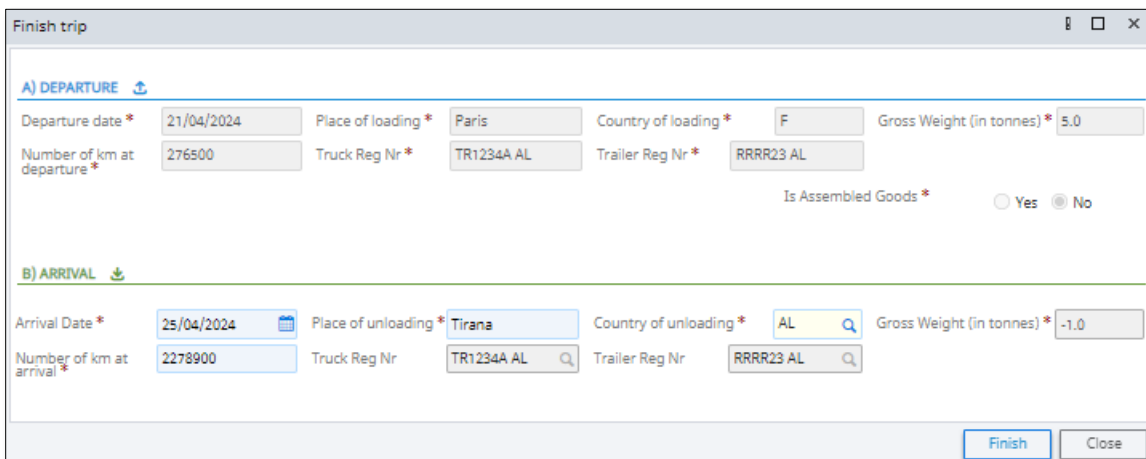
Click ⌷Finish button: confirmation messages about trip finish process will be displayed on the screen:

Figure 44 Confirmation messages on finish trip process
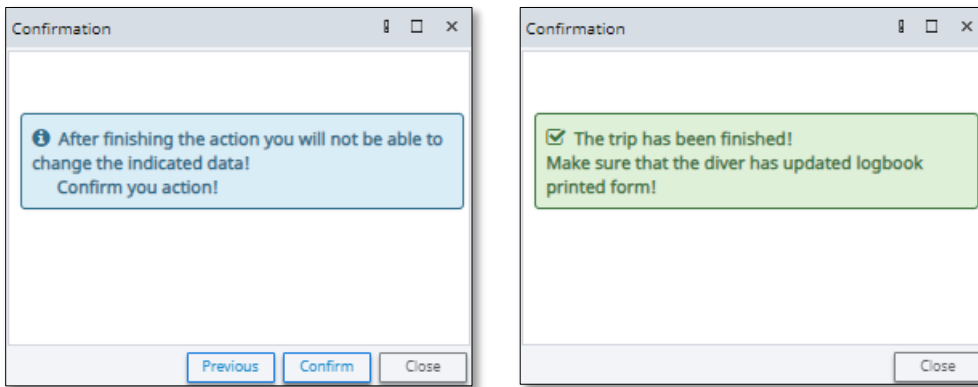
Click [Confirm] → [Close] buttons: confirmation messages will be closed, trip section in licence logbook will get "finished" status, trip management buttons will disappear from finished trip section:

Figure 45 Finished trip section in licence logbook
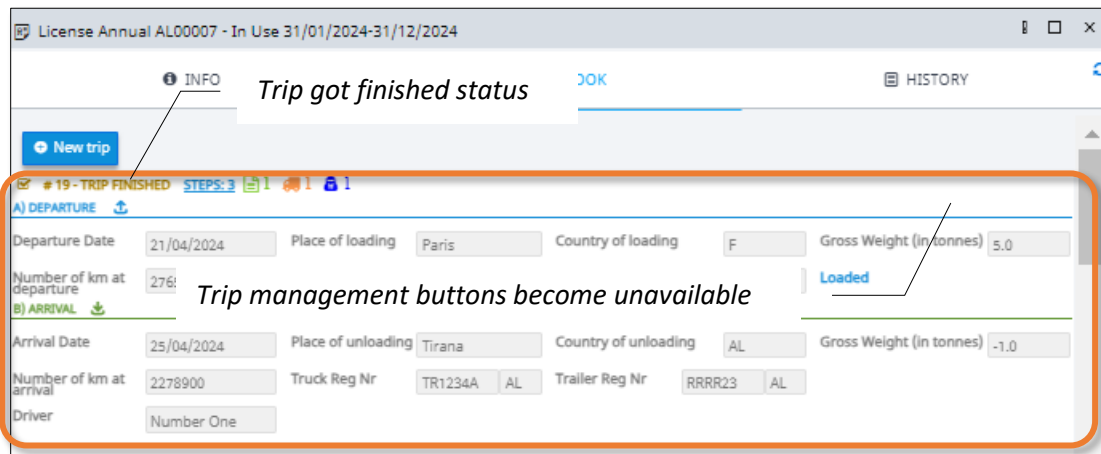
3.2   Trucks Management

3.2.1   How to Add New Truck. Truck's Profile Form

In menu bar of Trucks list click [New Truck] button:

Figure 46 Start of new truck adding process
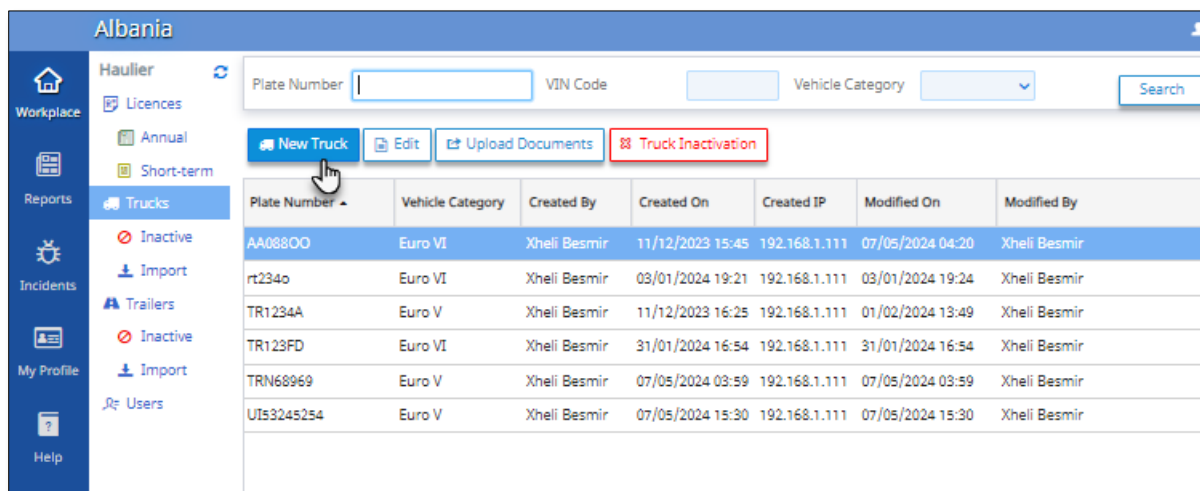
In form that will be opened provide truck's info:

Figure 47 New Truck form (first step)

Click [Upload documents] button: uploading documents step with list of required documents will be displayed:

Figure 48 New truck form. Document Uploading (second step)

2) Click here to start file uploading process
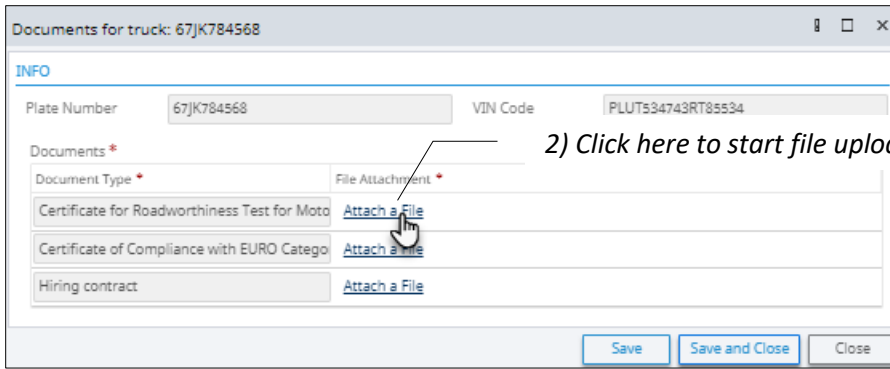
To upload a document, do steps described on Figure 49 or Figure 50

Figure 49 Document uploading (way 1)

1) Click on this aria to open file selection window

2) Select appropriate file on your hard disk

3) Click Open button to apply selection
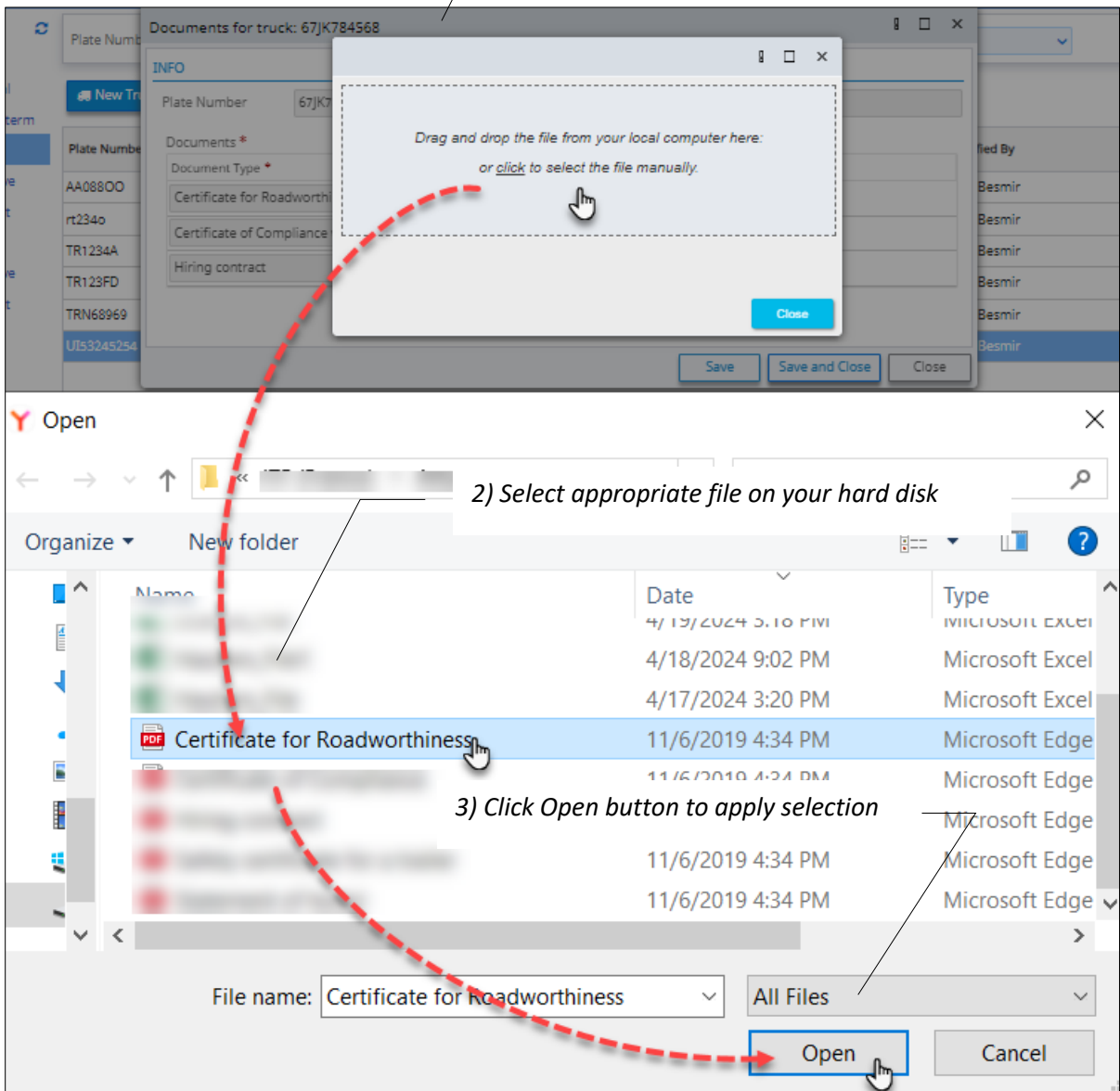
Figure 50 Document uploading (way 2)
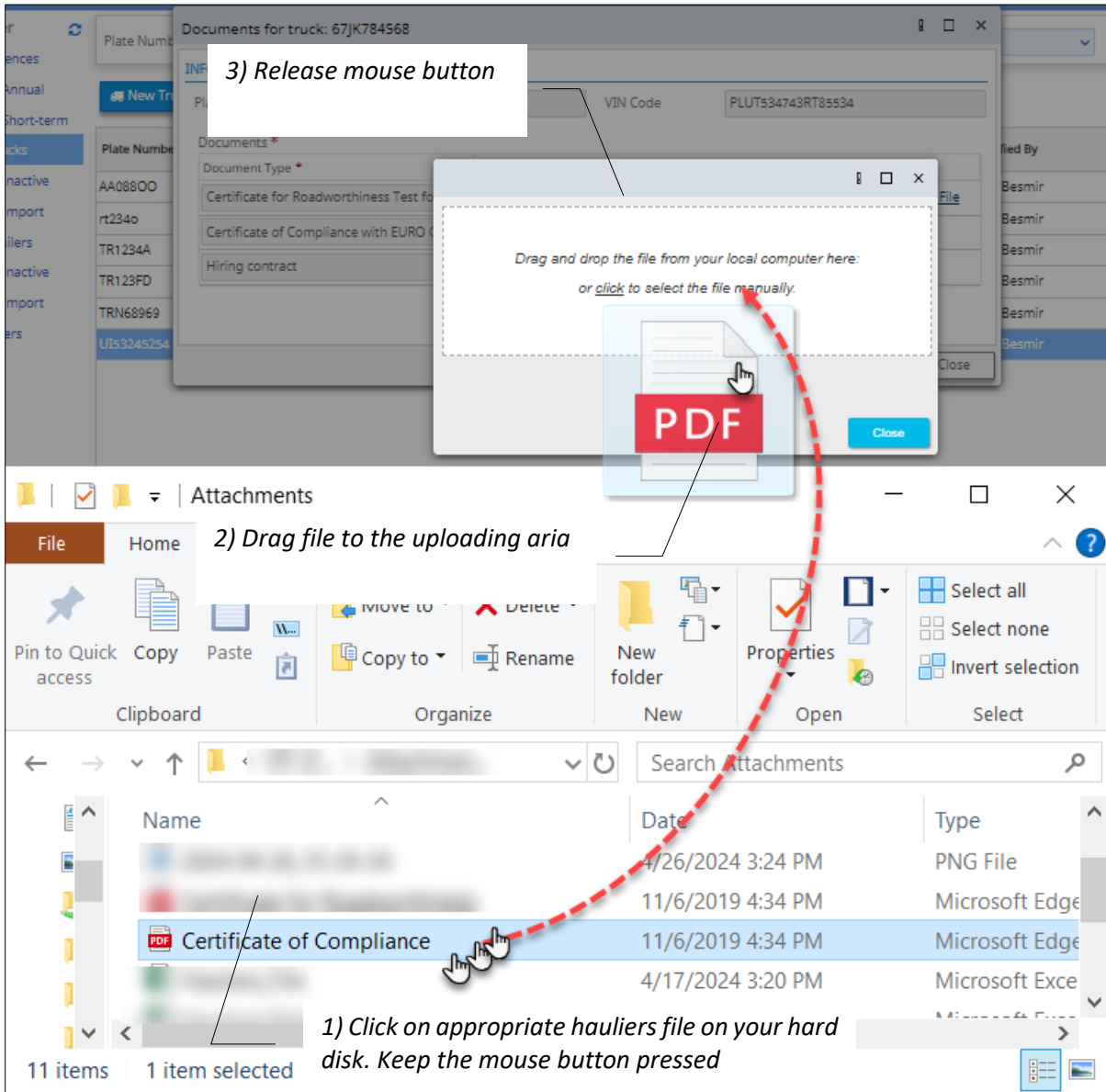
After all documents will be uploaded document uploading form will have following view:

Figure 51 New truck form. Document Uploading step after uploads are done
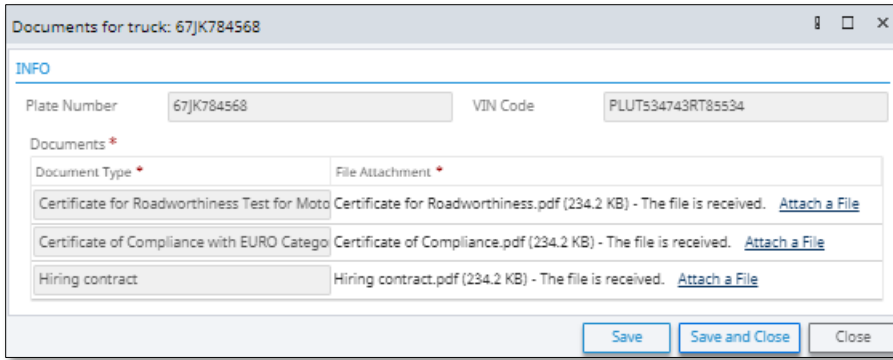
Click [Save and Close] button: truck adding process will be done, truck's data will be saved and new truck record will be viewed in the list of haulier's active trucks:
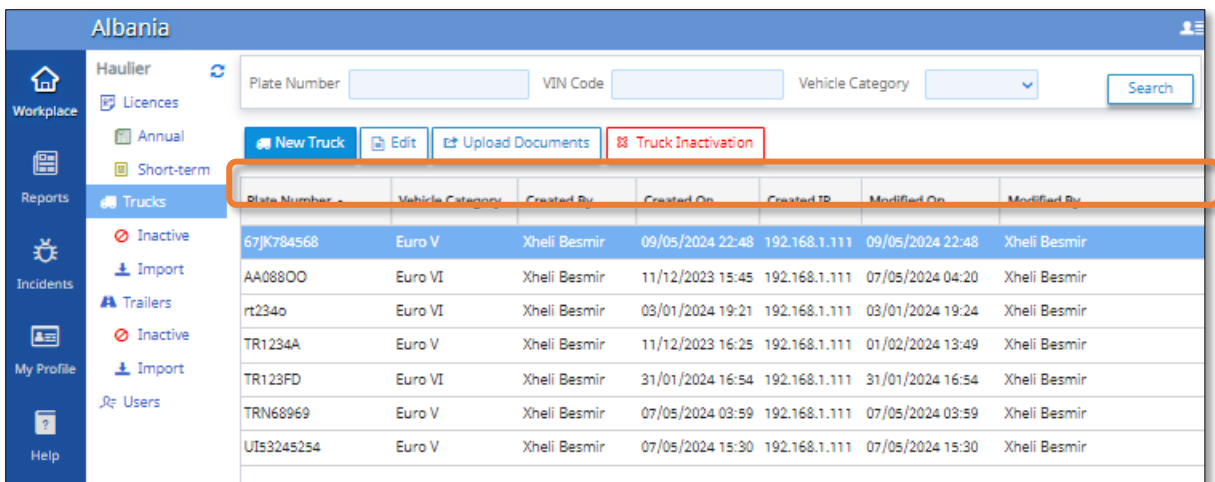
You can click any of truck's records to view its data in a separate form with its own profile:

Figure 52 Truck's profile form. Info interface
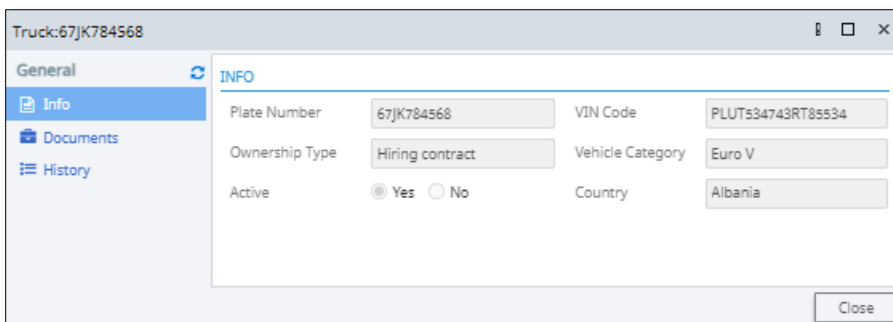
Trucks profile form contains truck's general info (see Figure 52), list of uploaded documents (Figure 53) and truck's actions history (Figure 54):

Figure 53 Truck's profile form. Documents list
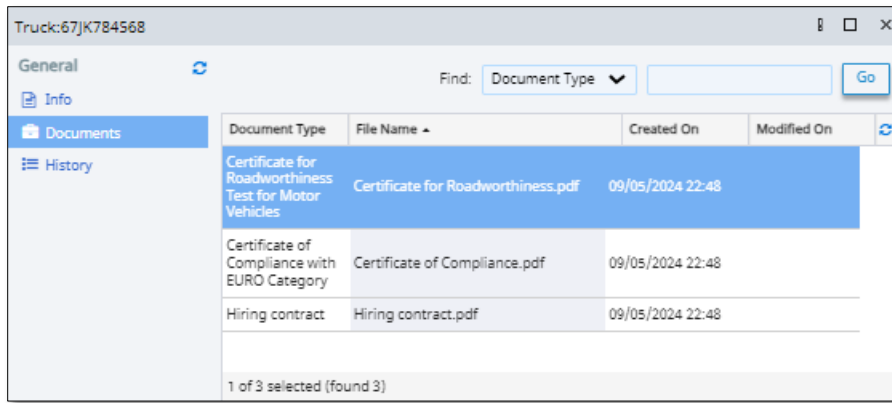
Figure 54 Truck's profile form. History list
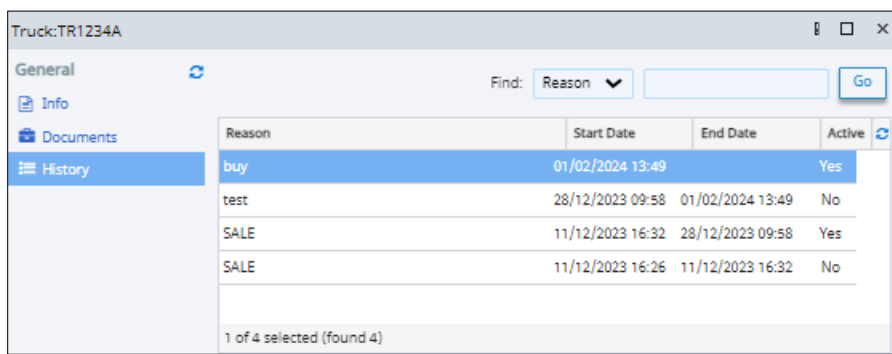
3.2.2 How to Edit Truck's Data

In truck's list select truck record for editing (one click on truck's record for selection) and click

Edit button:

Figure 55 Start of truck's record editing process

1) Click Edit button to start the process
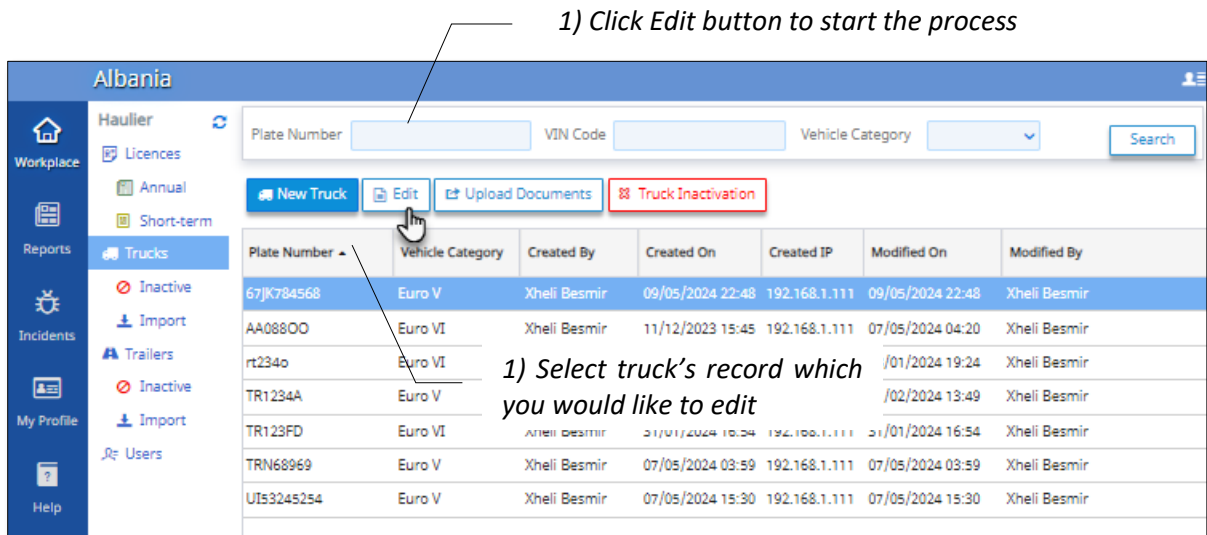
Truck's form with truck's data will be displayed in editing mode:

Figure 56 Truck's form opened in editing mode (first step)
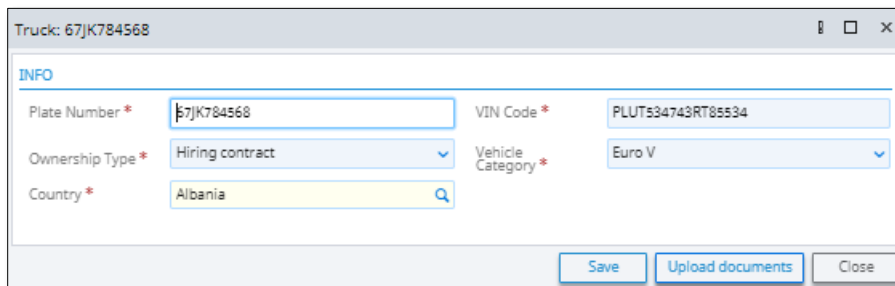
Provide necessary changes and click [Upload documents] button: the step with uploaded documents will be displayed:

Figure 57 Truck's form opened in editing mode (documents uploading step)
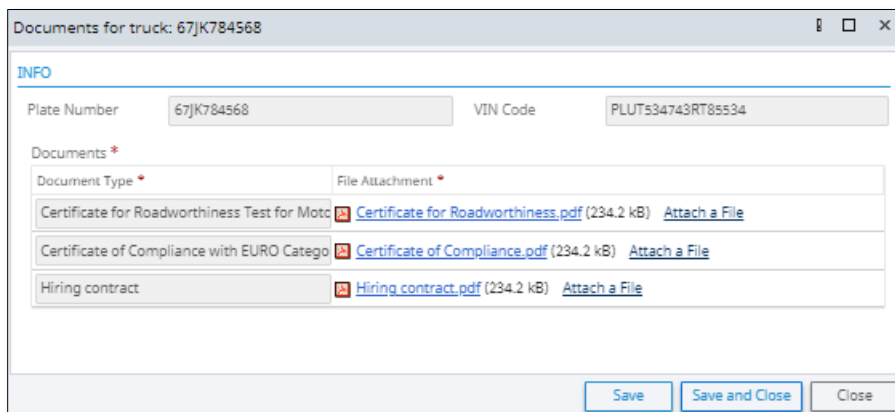
Use this step to download existing file documents or to upload new ones (see Figure 49 and Figure 50). Click [Save and Close] button: inserted changes will be saved, truck's form will be closed.

3.2.3   How to Upload Documents to Truck's Record

In truck's list select truck record for which you would like to upload documents and click

[↪ Upload Documents] button:

Figure 58 Start of documents uploading process
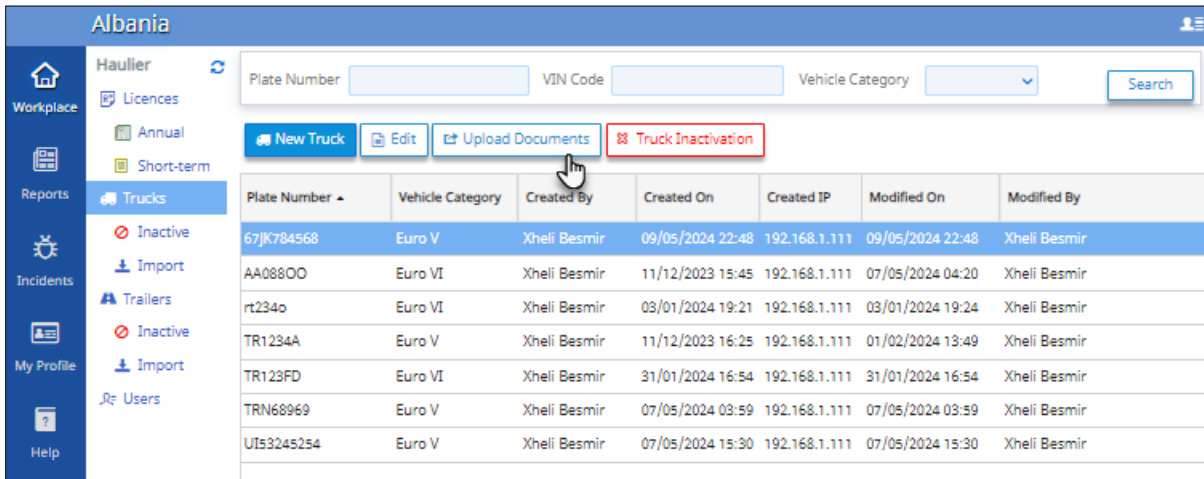
In form that will be open use links of uploaded documents to download them (in case of necessity) or use Attach a File buttons to upload new documents instead of old ones:

Figure 59 Truck's uploading documents form
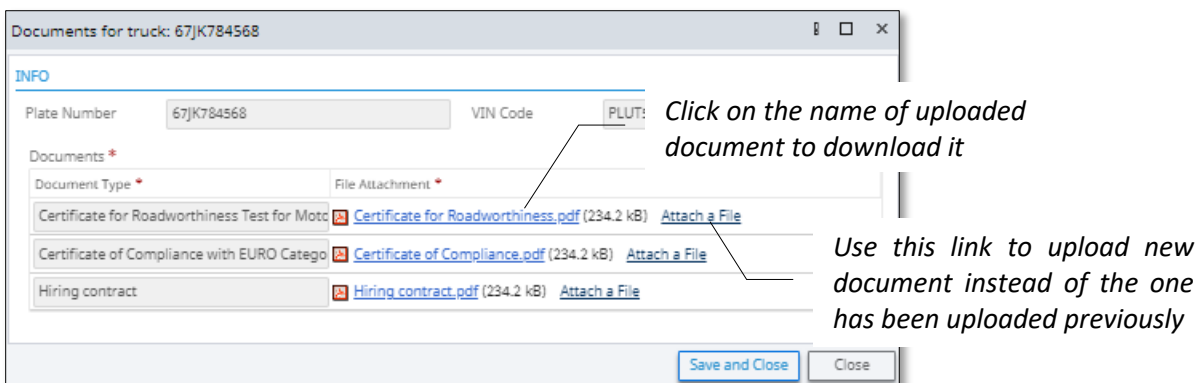
See Figure 49 and Figure 50 to get information about ways of document uploading.

3.2.4   How to Inactivate Truck's Record

In truck's list select truck record which you would like to inactivate and click [⊠ Truck Inactivation] button:

Figure 60 Start of truck inactivation process

1) Click Truck Inactivation button to start the process

1) Select truck's record which you would like to inactivate

In form that will be opened provide reason of inactivation:

Figure 61 Truck inactivation form

Click [Confirm] button: inactivation form will be closed, truck record will be moved in the list of inactive trucks:

3.2.5   How to Activate Inactive Truck's Record

In inactive truck's list select truck record which you would like to activate back and click

[Truck Activation] button:

Figure 62 Start of truck's activation process
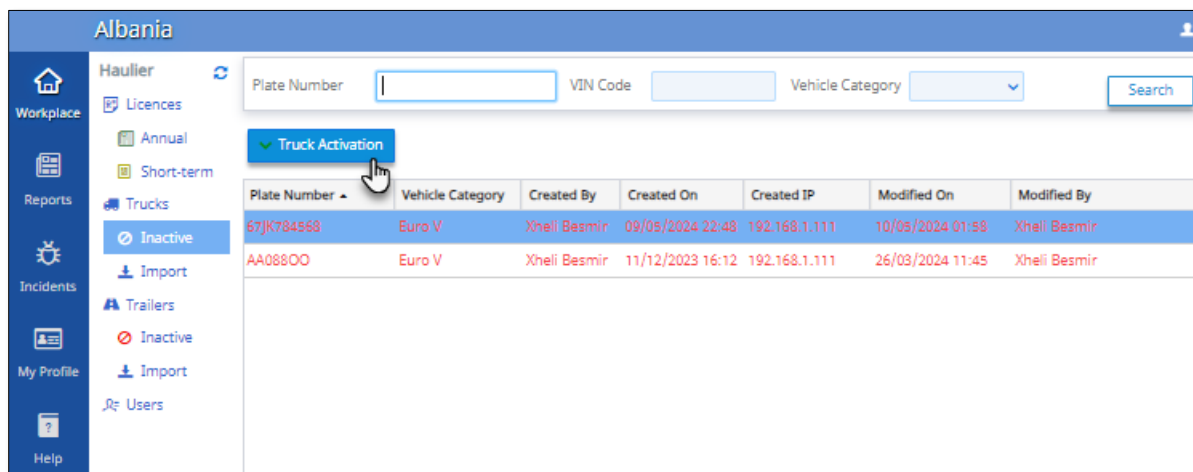
In form that will be opened provide reason of truck's activation:

Figure 63 Truck's activation form

Click [Confirm] button: activation form will be closed, truck record will be moved back in the list of hauler's active trucks:
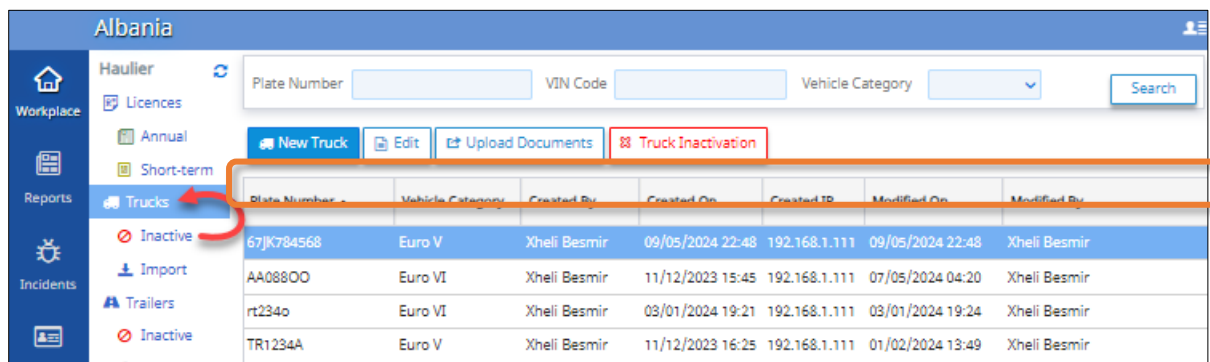
3.2.6 How to Import Trucks' Records

In "Trucks' Import" interface click on [⬆ Import] button:

Figure 64 Start of trucks' records importing process
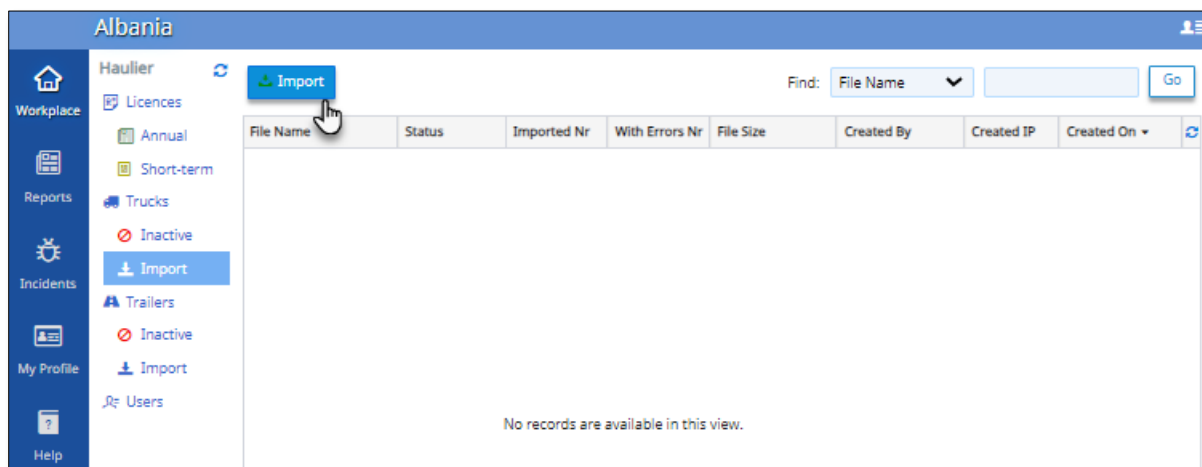
In "Import Trucks" form that will be opened on your screen do following:

- Use [ⓘ Template for trucks file] button to download template trucks file

- Use [Attach a File] button to upload trucks' file filled in accordance with downloaded template

Figure 65 "Import Trucks" form
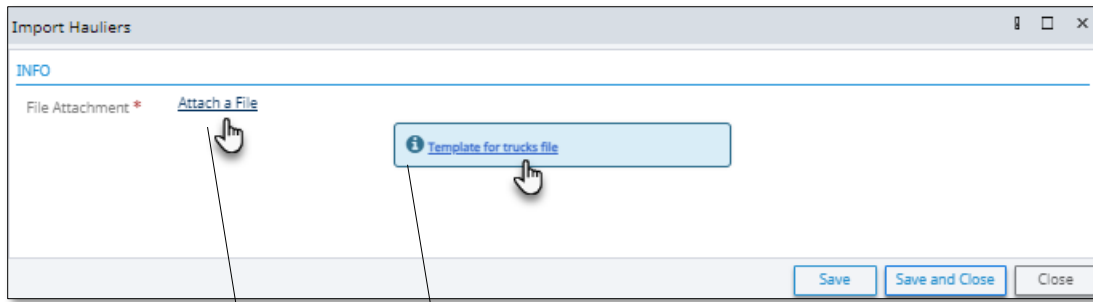
1) Click here to download trucks' template file that you can use for trucks' records filling

2) Click here to upload filled in trucks file

See Figure 49 and Figure 50 to get information about ways of document uploading.

Figure 66 Trucks template file
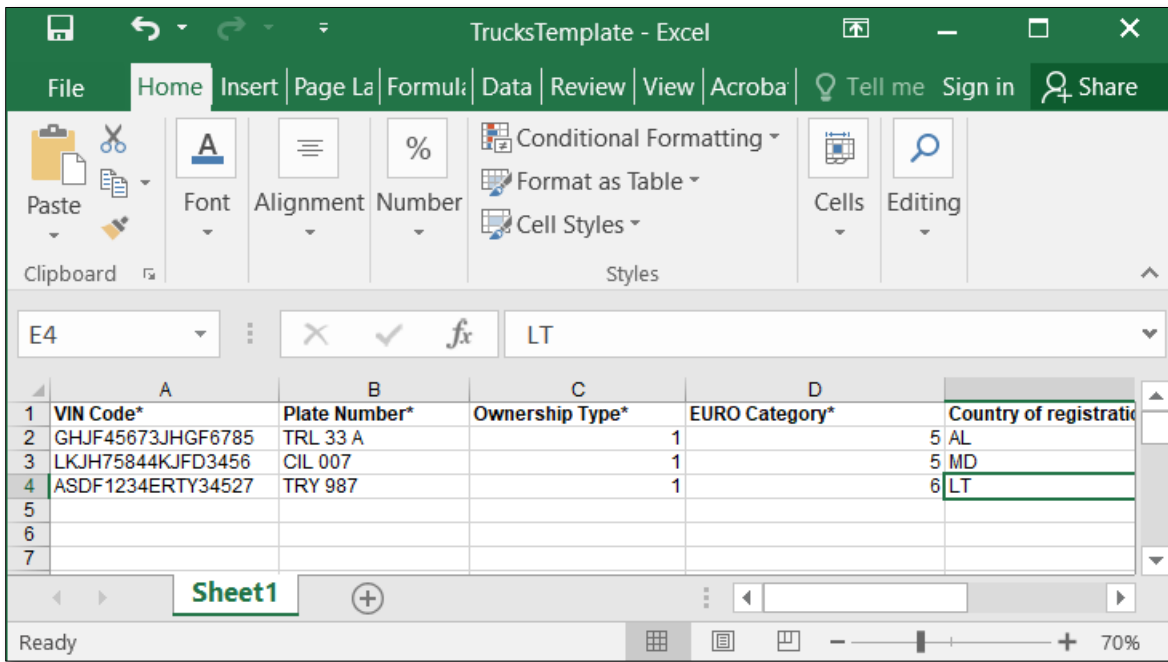
Figure 67 Trucks' records file filled in on base of the downloaded template
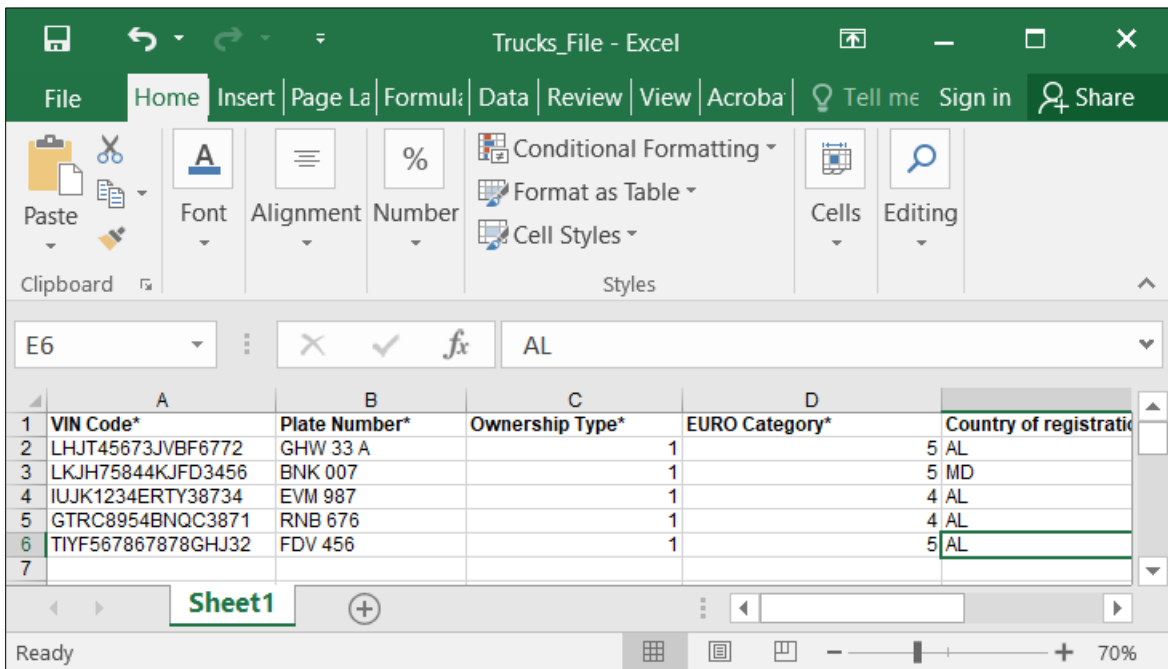
Once file uploading process is done, uploaded file record appears in Trucks Import list:
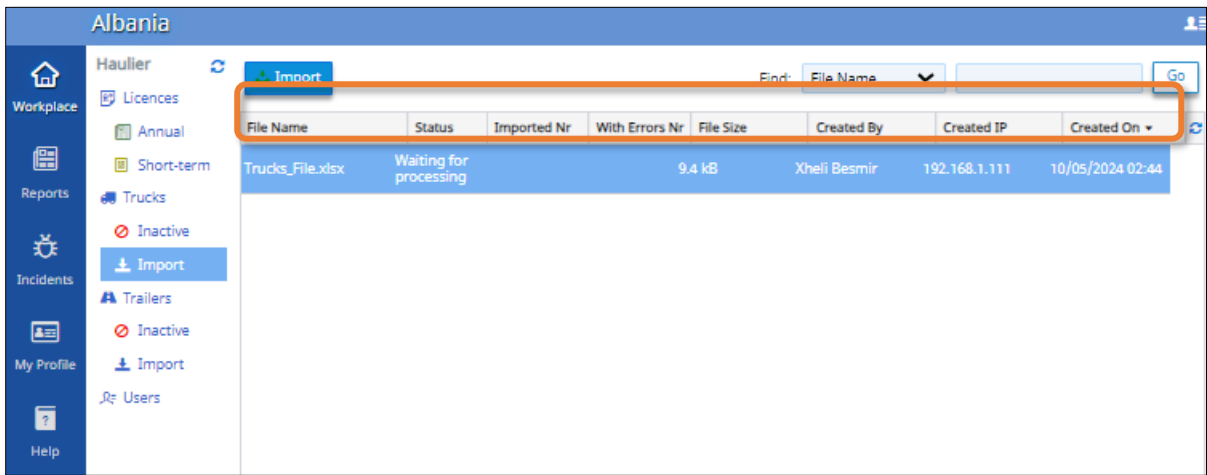
The following processing procedure of uploaded files is executed during the night time. Once processing is done, trucks' records can be found in haulier's active trucks' list.

3.3   Trailers Management

3.3.1   How to Add New Trailer. Trailer's Profile Form

In menu bar of Trailers list click Add Trailer button:

Figure 68 Start of new trailer adding process
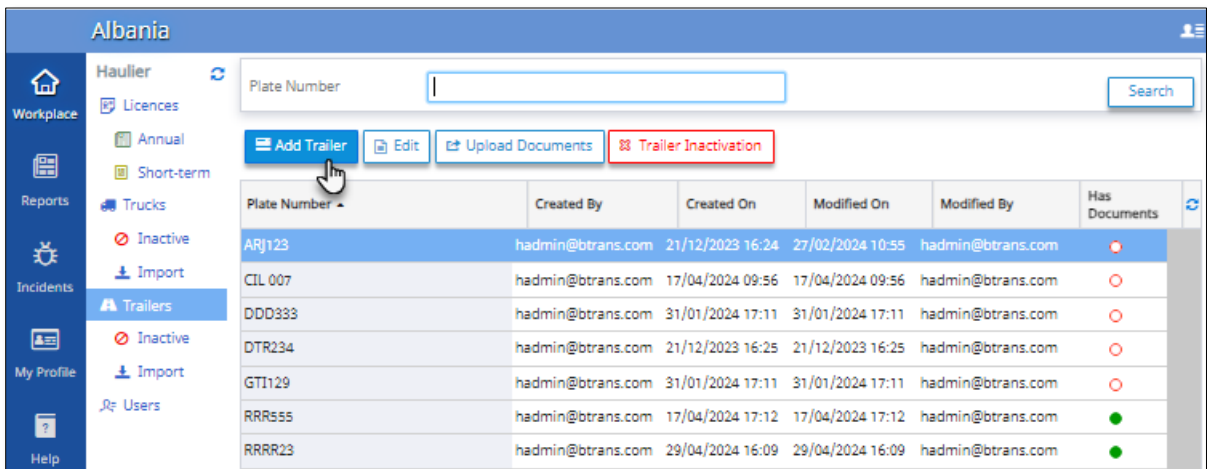
In form that will be opened provide trailer's info:

Figure 69 New Trailers form (first step)

Click [Upload documents] button: uploading documents step with list of required documents will be displayed:

Figure 70 New Trailers form. Document Uploading (second step)

See Figure 49 and Figure 50 to get information about ways of document uploading.

After all documents will be uploaded document uploading form will have following view:

Figure 71 New trailers form. Document Uploading step after uploads are done

Click [Save and Close] button: truck adding process will be done, trailer's data will be saved and new trailer record will be viewed in the list of haulier's active trailers:
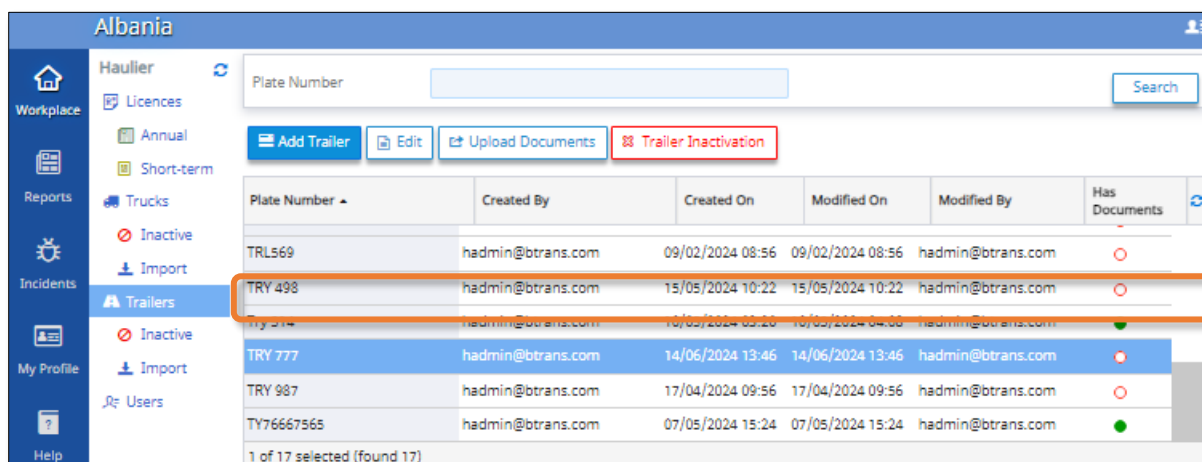
You can click any of trailers' records to view its data in a separate form with its own profile:

Figure 72 Trailer's profile form. Info interface
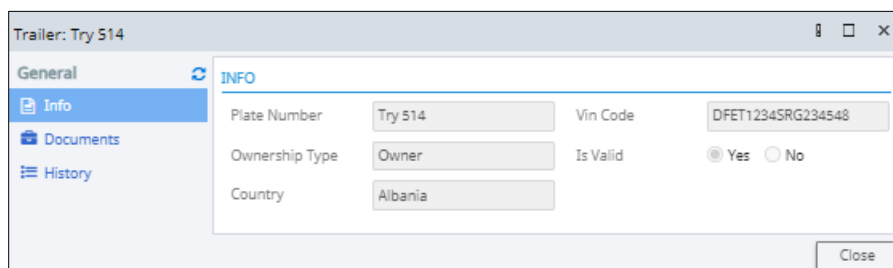
Trucks profile form contains trailer's general info (see Figure 72), list of uploaded documents (Figure 73) and trailer's actions history (Figure 74):

Figure 73 Trailer's profile form. Documents list
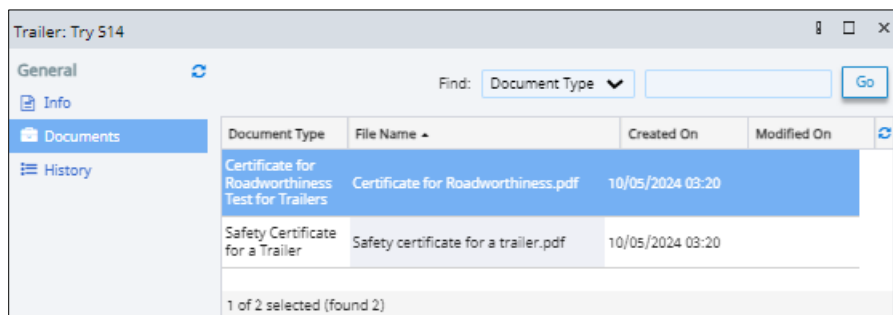
Figure 74 Trailer's profile form. History list

3.3.2   How to Edit Trailer's Data

In trailer's list select trailer record for editing (one click on trailer's record for selection) and click [Edit] button:

Figure 75 Start of trailer's record editing process

1) Click Edit button to start the process

1) Select trailer's record which you would like to edit

Truck's form with trailer's data will be displayed in editing mode:

Figure 76 Trailer's form opened in editing mode (first step)
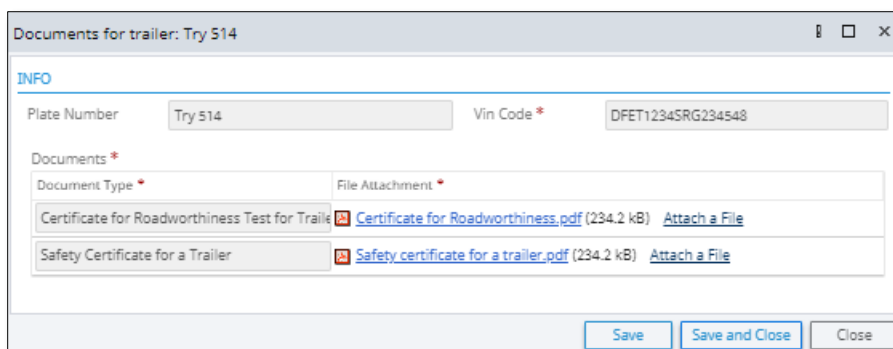
Provide necessary changes and click [Upload documents] button: the step with uploaded documents will be displayed:

Figure 77 Trailer's form opened in editing mode (documents uploading step)

Use this step to download existing file documents or to upload new ones (see Figure 49 and Figure 50). Click Save and Close button: inserted changes will be saved, trailer's form will be closed.

3.3.3   How to Upload Documents to Trailer's Record

In truck's list select trailer record for which you would like to upload documents and click Upload Documents button:

Figure 78 Start of documents uploading process

In form that will be open use links of uploaded documents to download them (in case of necessity) or use Attach a File buttons to upload new documents instead of old ones:

Figure 79 Trailer's uploading documents form

Click on the name of uploaded document to download it

Use this link to upload new document instead of the one has been uploaded previously
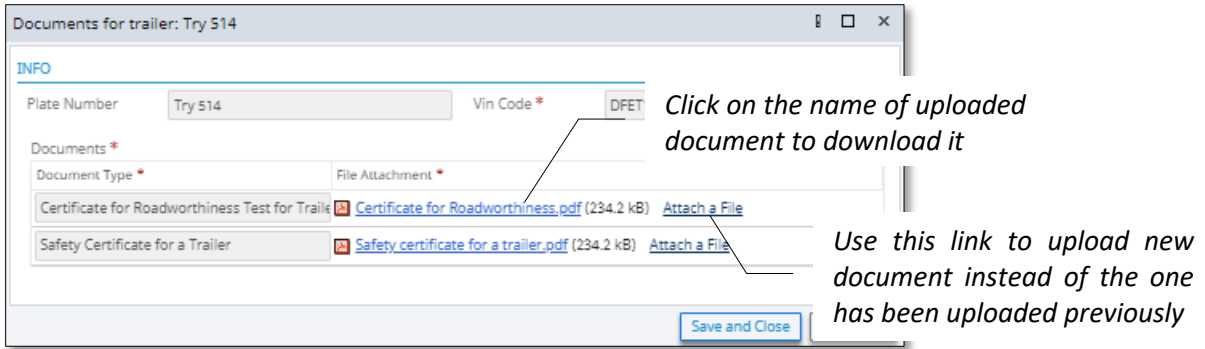
See Figure 49 and Figure 50 to get information about ways of document uploading.

3.3.4   How to Inactivate Trailer's Record

In truck's list select trailer record which you would like to inactivate and click [⚙ Trailer Inactivation] button:

Figure 80 Start of trailer inactivation process

1) Click Trailer Inactivation button to start the process

1) Select trailer's record which you would like to inactivate
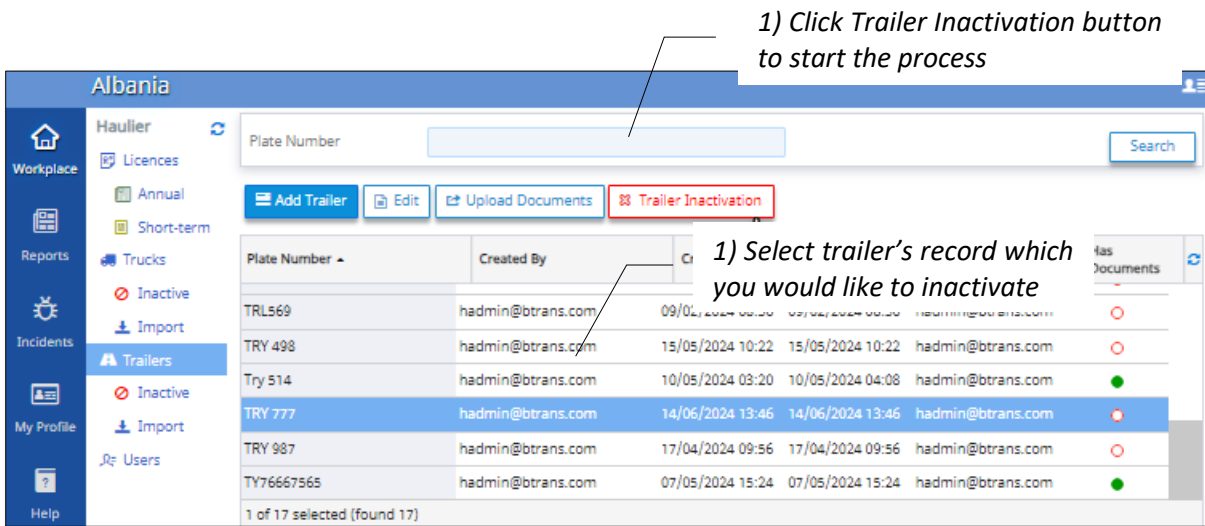
In form that will be opened provide reason of inactivation:

Figure 81 Trailer inactivation form
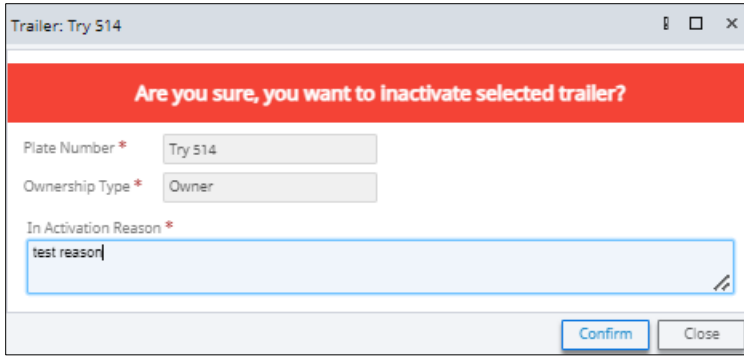
Click Confirm button: inactivation form will be closed, trailer record will be moved in the list of inactive trailers:
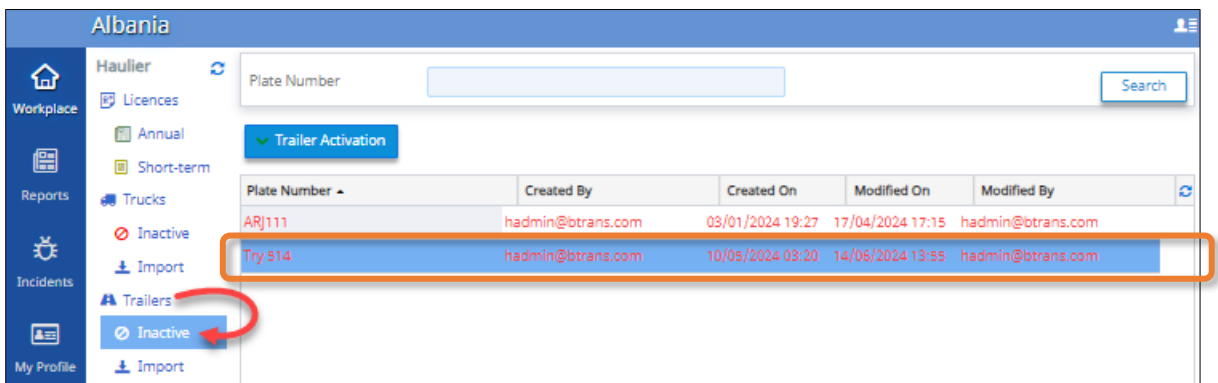
3.3.5   How to Activate Inactive Trailer's Record

In inactive truck's list select trailer record which you would like to activate back and click Trailer Activation button:

Figure 82 Start of trailer's activation process
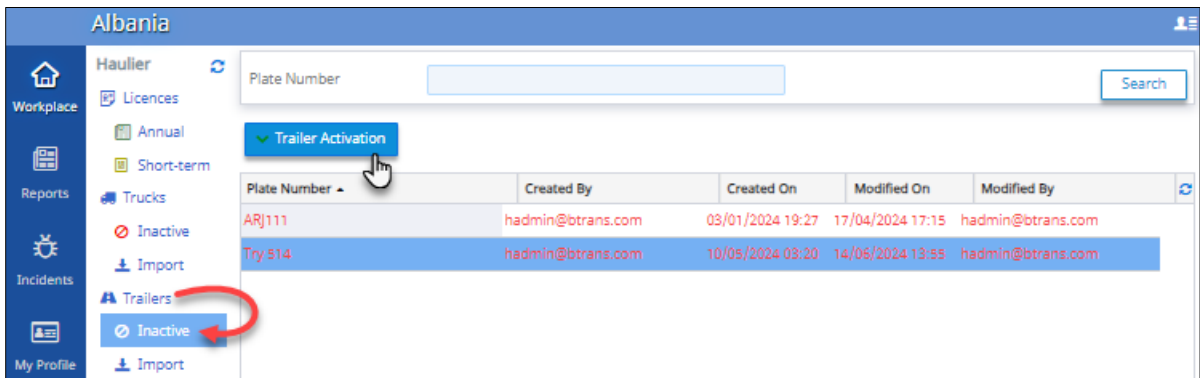
In form that will be opened provide reason of trailer's activation:

Figure 83 Trailer's activation form
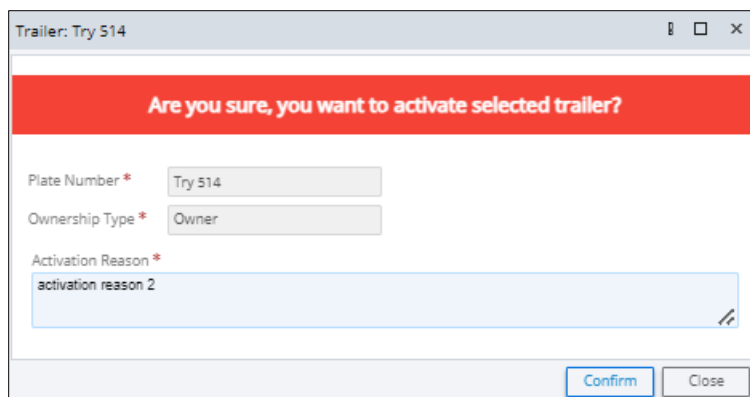
Click [Confirm] button: activation form will be closed, truck record will be moved back in the list of hauler's active trailers:
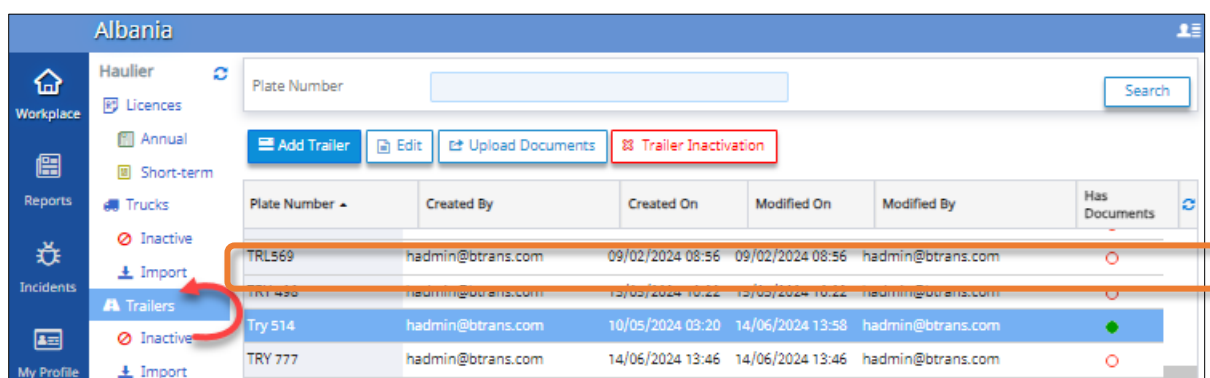
3.3.6   How to Import Trailers' Records

In "Trailers' Import" interface click on [Import] button:

Figure 84 Start of trailers' records importing process
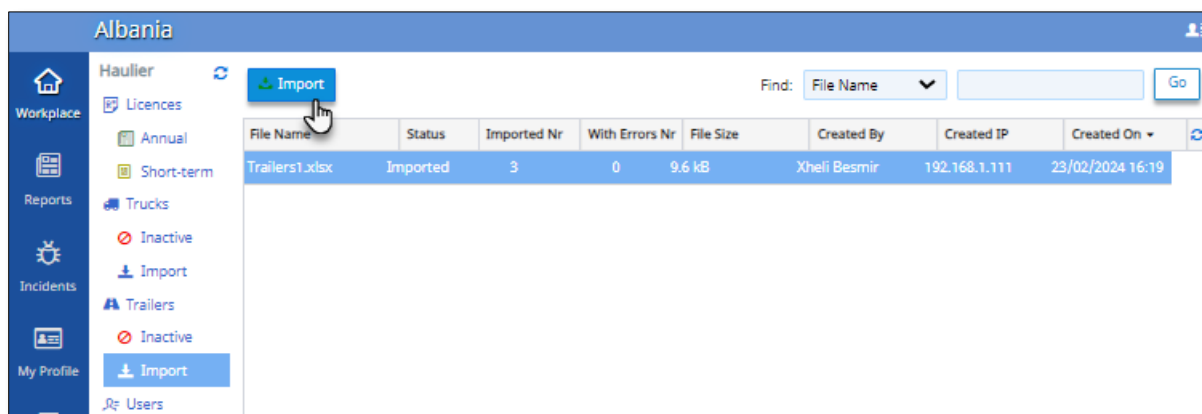
In "Import Trailers" form that will be opened on your screen do following:

- Use [Template for trailers file] button to download template trailers file

- Use Attach a File button to upload trailers' file filled in accordance with downloaded template

Figure 85 "Import Trailers" form
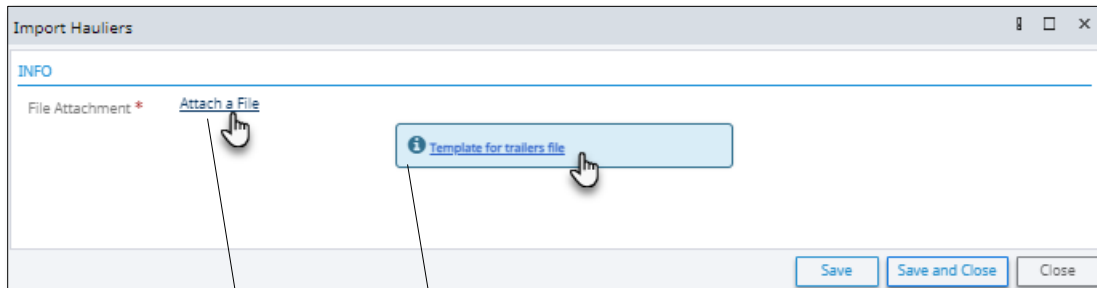
1) Click here to download trailers' template file that you can use for trailers' records filling

2) Click here to upload filled in trailers file

See Figure 49 and Figure 50 to get information about ways of document uploading.

Figure 86 Trailers' template file
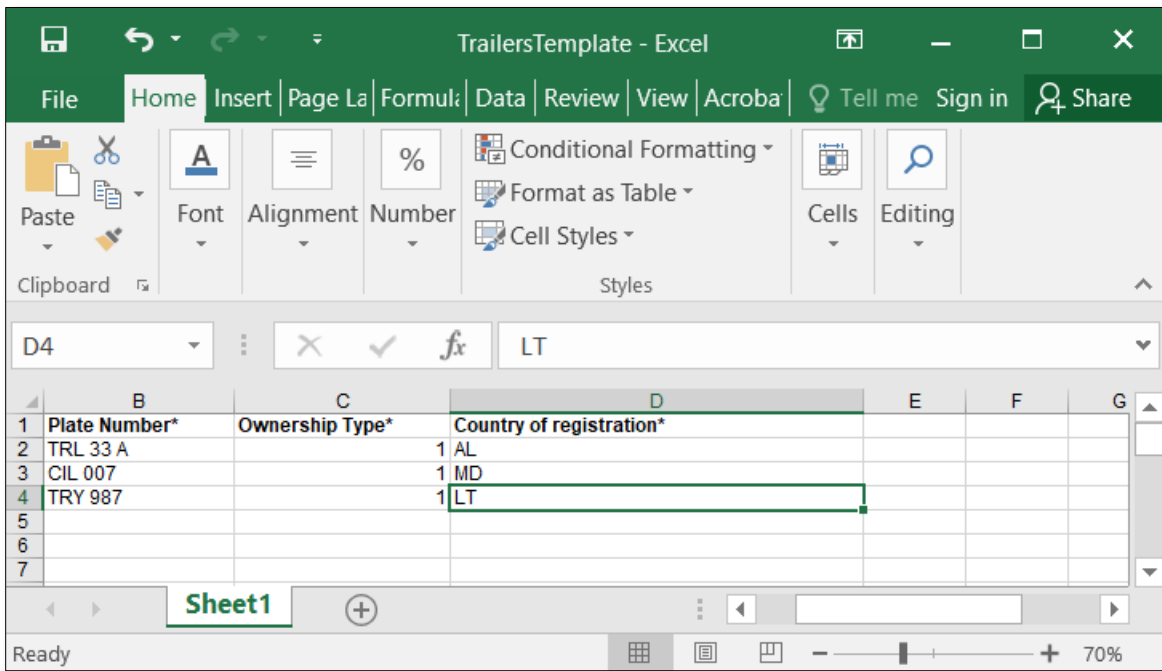
Figure 87 Trailers' records file filled in on base of the downloaded template
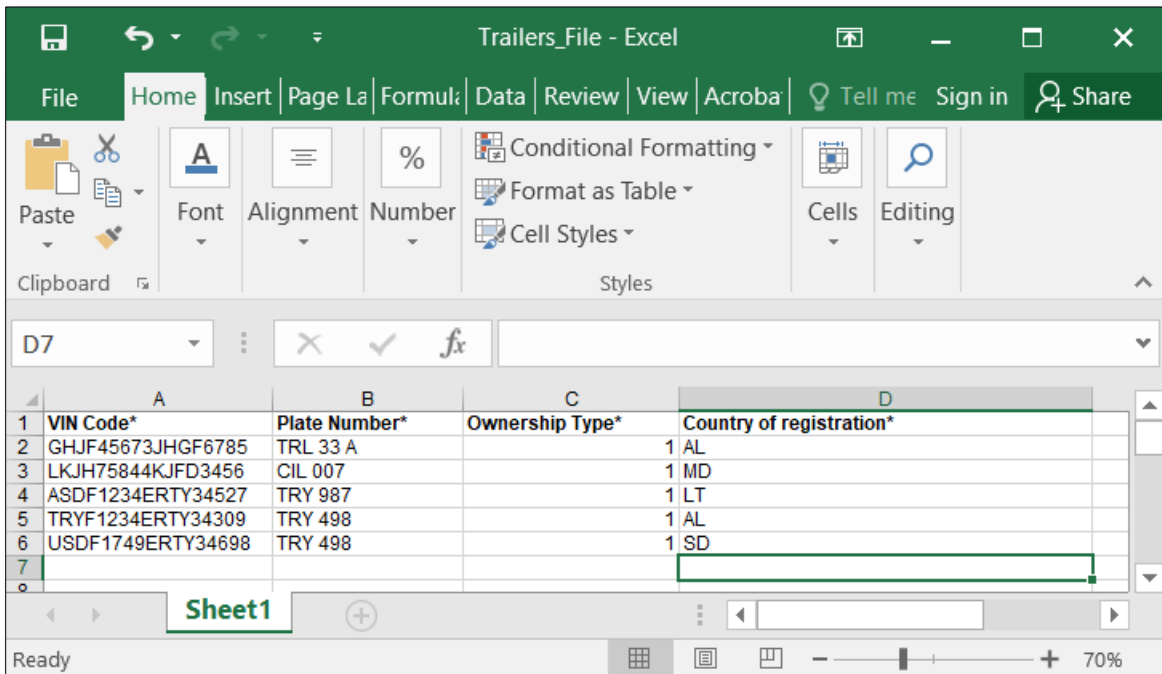
Once file uploading process is done, uploaded file record appears in Trailers Import list:
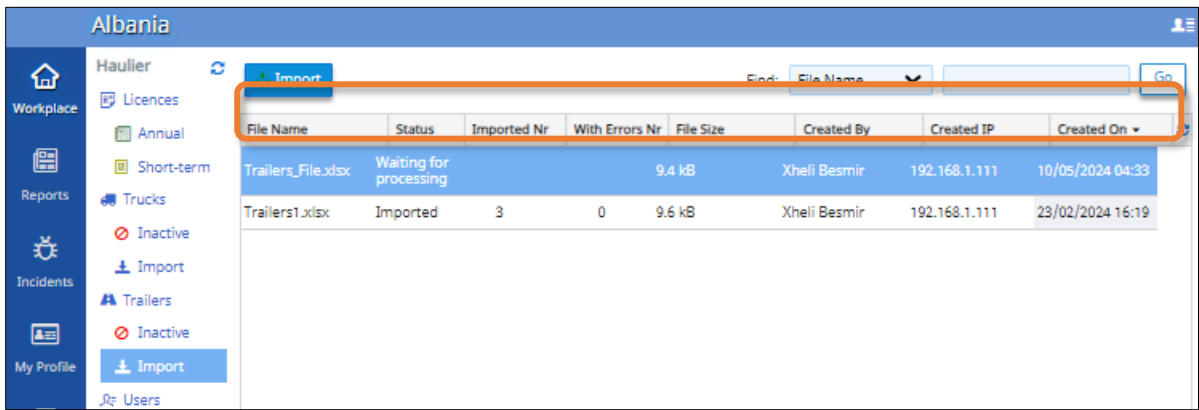
The following processing procedure of uploaded files is executed during the night time. Once processing is done, trailers' records can be found in haulier's active trailers' list.

Users Management

3.3.7 How to Create New User

In "Users" interface click on [+ New User] button

Figure 88 Start of new user creation process
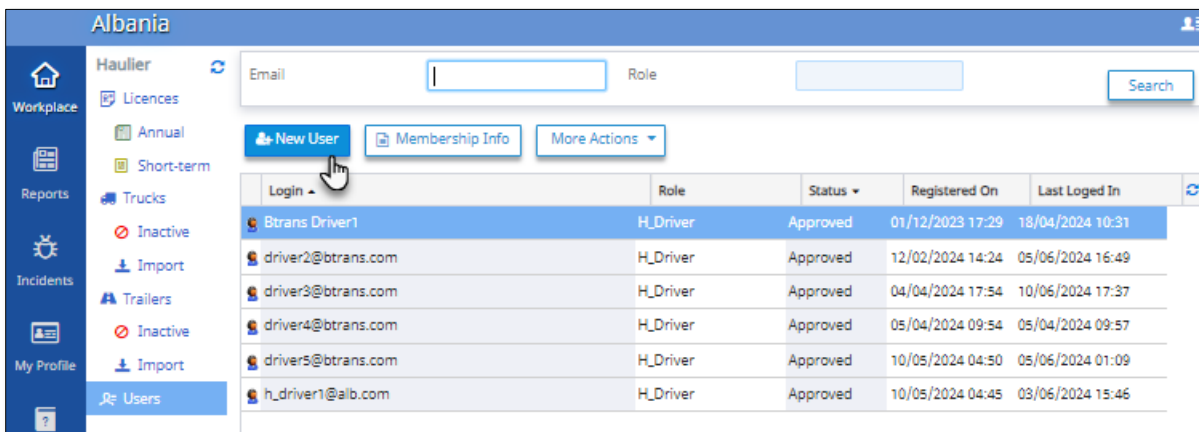
In form that will be displayed provide user's info in required fields:

Figure 89 New user registration form

Select user's role (H_Driver or H_Manager)

Click on [Register] button: warning message about successful user creation will be displayed:

Figure 90 Warning message on successful user creation
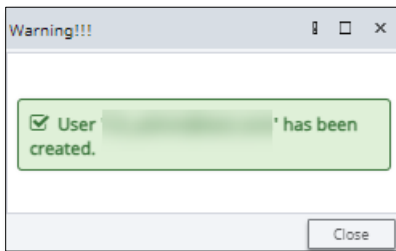
Click [Close]: warning message window will be closed, new user record will appear in the list of existing users:

3.3.8   How to View / Edit Existing User's Info (Unlock/Disable User)

To view existing user's info double click on its record in existing users' list

Or

Select user's record in the list (one click on record for selection) and click on 📄 Membership Info :

Figure 91 Opening User's membership info form
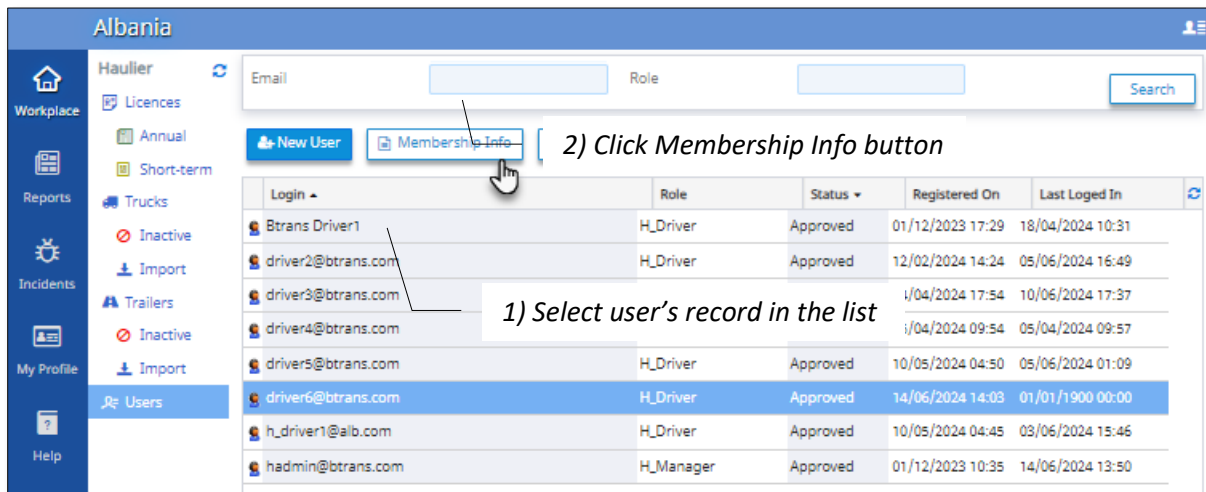
Figure 92 User's membership info form opened in editing mode
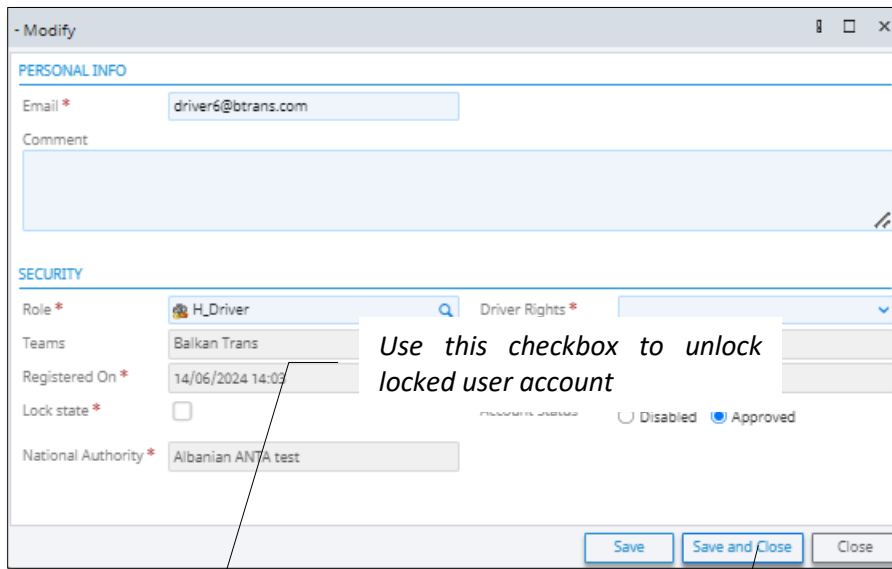
Note: for users in H_Driver role, Haulier Manager is enabled to select their access rights (whether driver can complete logbook or just see it):

Figure 93 Driver rights selection
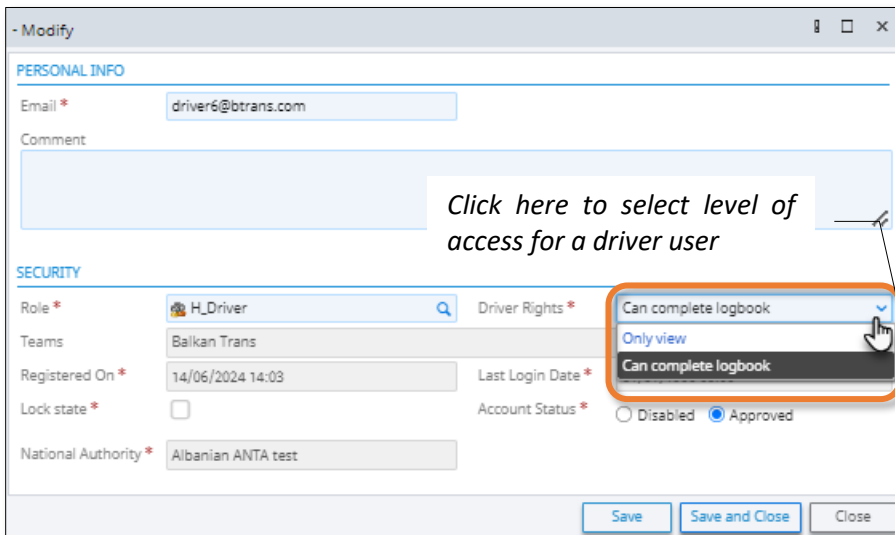
As Haulier Manager you are enabled to unlock locked user (user can be locked due to wrong password entering specified number of attempts): for that purpose, use "Lock state" checkbox.

Also you can disable user account using "Account Status" switchers (user can be suspended from its activity in the system if its status is disabled). Disabled user records are shown in red color in users' list:

Figure 94 Viewing disabled user record in the grid
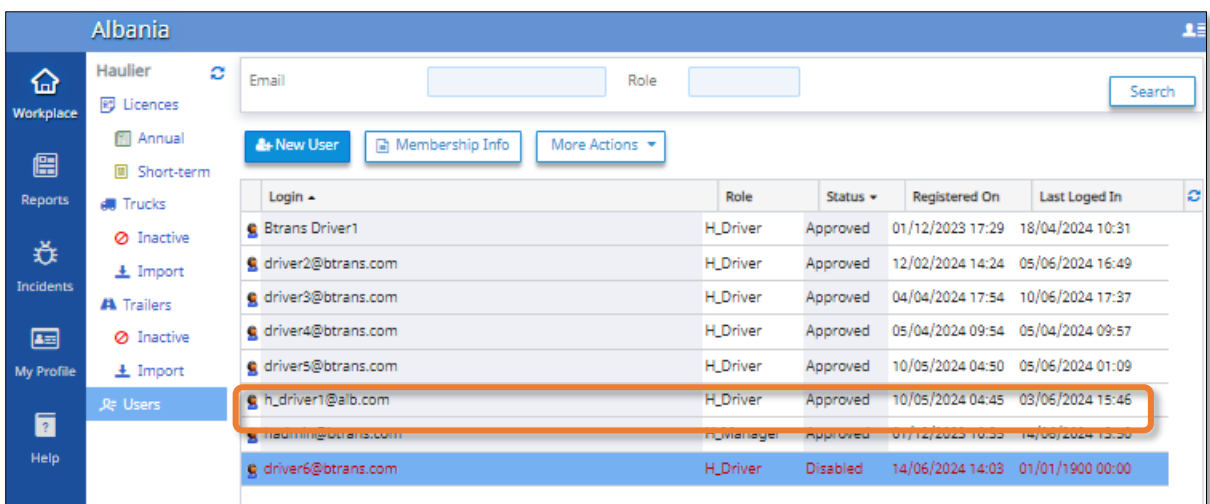
To enable user, switch his status back to "Approved" value.

3.3.9 How to Change User's Password

Select user record in users' list. In list menu bar click [More Actions ▾] → [⊟ Change Password]

Figure 95 "Change password" process start
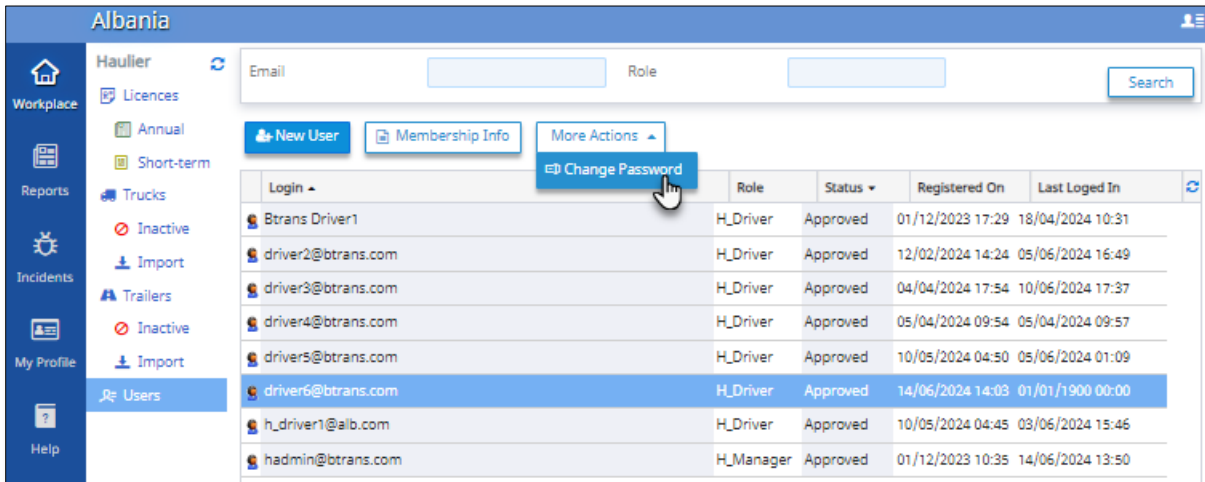
In "change password" form that will be viewed on your screen type user's new password:

Figure 96 Change password form
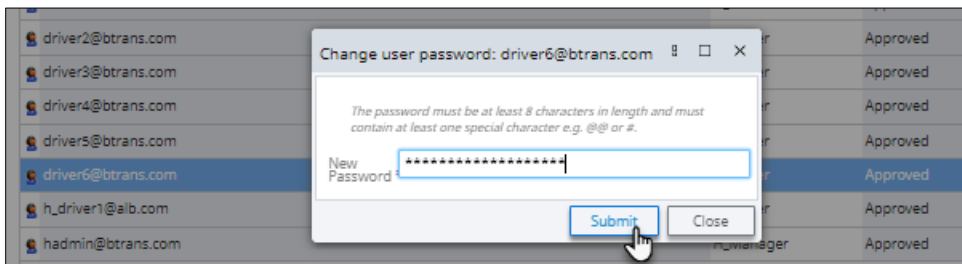
Click [Submit] button: message about successful password changing will be displayed on the screen:

Figure 97 Message about successful password changing
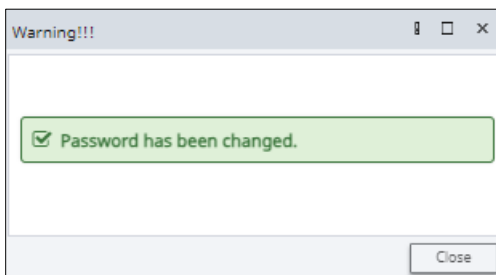
Click [Close] button to finish the process and to close message form.

4   Reports

Reports can be characterized as a special way of system data processing, that are presented in form of statistical tables. Viewing data in table mode makes possible their comparison for different time periods and various indicators analysis. Reports can be accessed from the main vertical menu:

Figure 98 Reports menu access
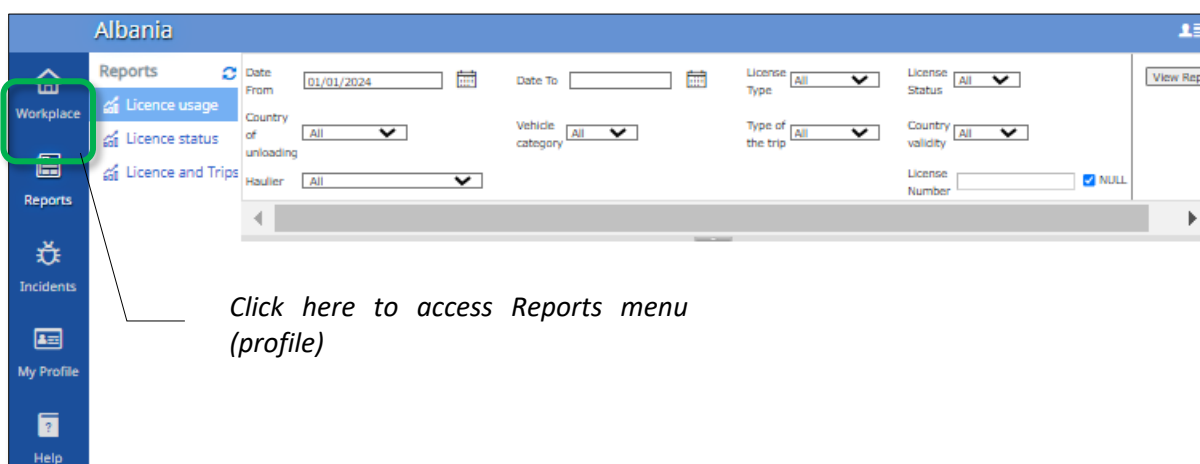
Reports menu is presented in a form of a profile tree located in the left part of the screen. To view a report, click on its name in the profile, provide report criteria (using the upper right part of the interface) and click ⬚View Report button.

Access to reports data is limited depending on user's role. Reports can be exported or saved on your computer in a convenient format, can be printed. Also you're able to do search in report's content by means of a special field provided for this purpose.

Figure 99 Licence usage report. Report interface elements
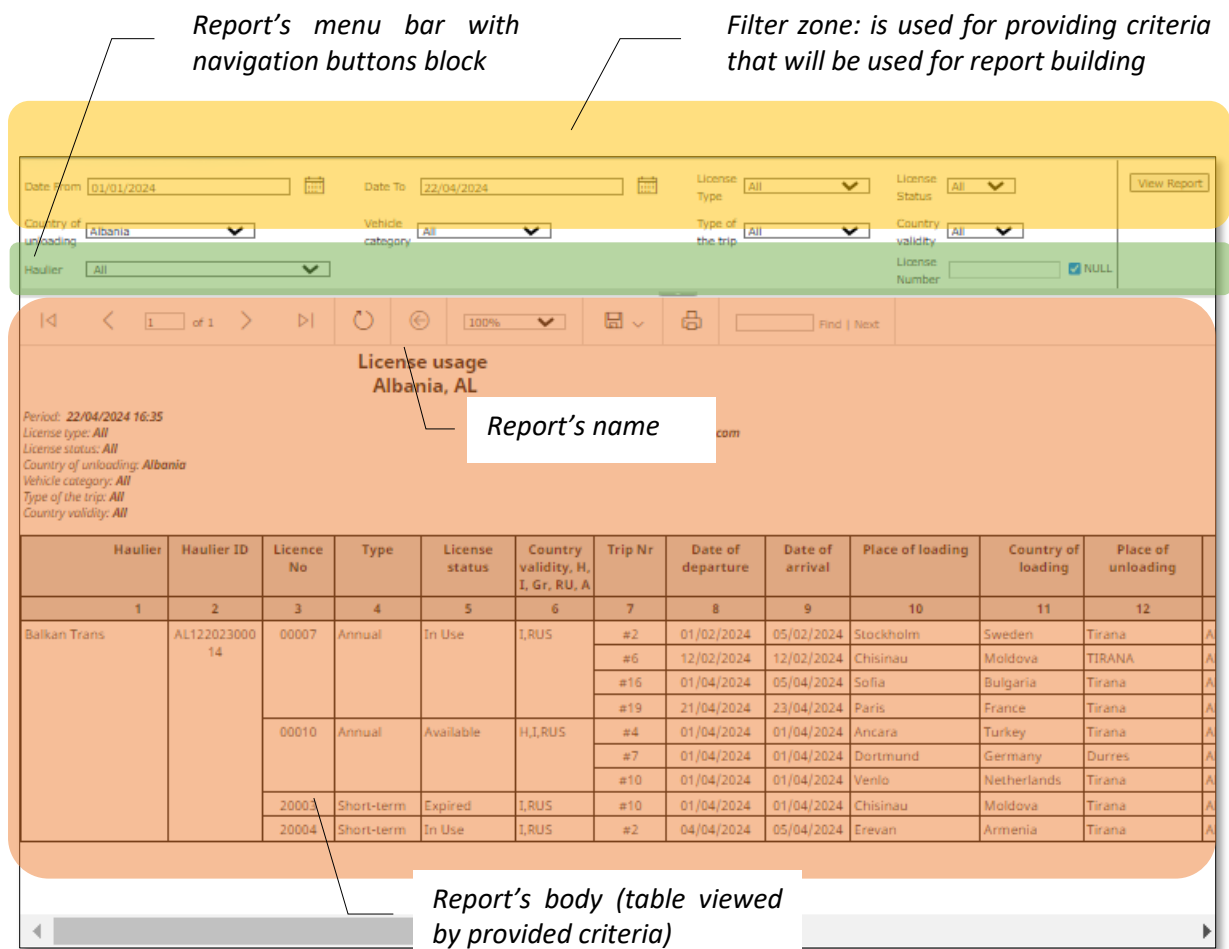
4.1   Elements of Report Interface

Report interface consists from three main zones (see Figure 99)

- **Filter zone**. Here you can use provided fields to set up criteria on which base report will be built. To view a report, you have to provide search criteria first:

Figure 100 Report's filter zone
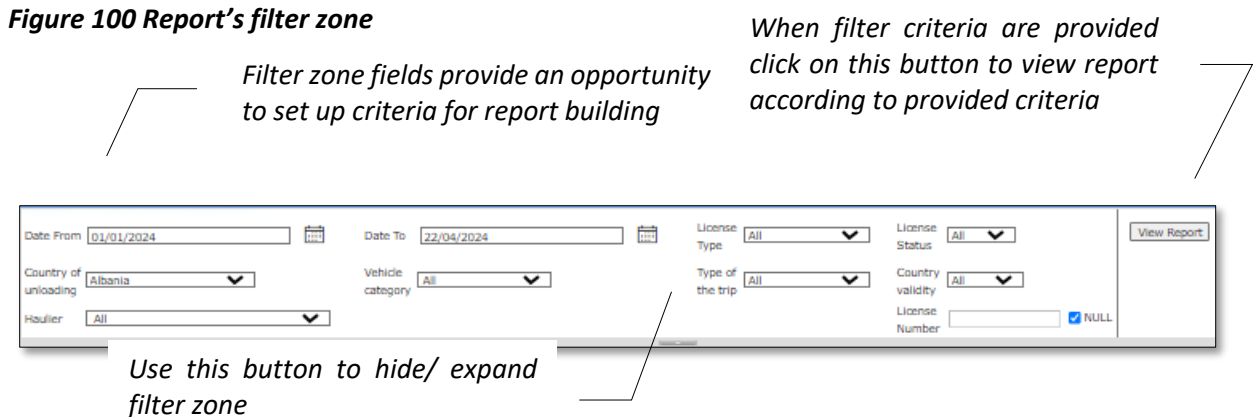
- **Menu bar with navigation buttons**. Allows navigation between report pages, scaling (zoom in / zoom out) repot view, saving report in one of purposed formats (MS Word, MS Excel, Power Point, PDF, TIFF file, etc.)

Figure 101 Report's menu bar

Report's refresh button

Report's scale menu (zoom in / zoom out)

Report's navigation zone (navigation between report's pages)

Find field: makes search of provided portion of text in report's body

Print button

Export drop down menu

- **Report's body**. Is viewed in a form of a table:

Figure 102 Report's body

License usage
Albania, AL

Period: **22/04/2024 16:35**
License type: **All**
License status: **All**
Country of unloading: **Albania**
Vehicle category: **All**
Type of the trip: **All**
Country validity: **All**

Date of report **22/04/2024 16:35**
Generated by **victoria1@albania.com**

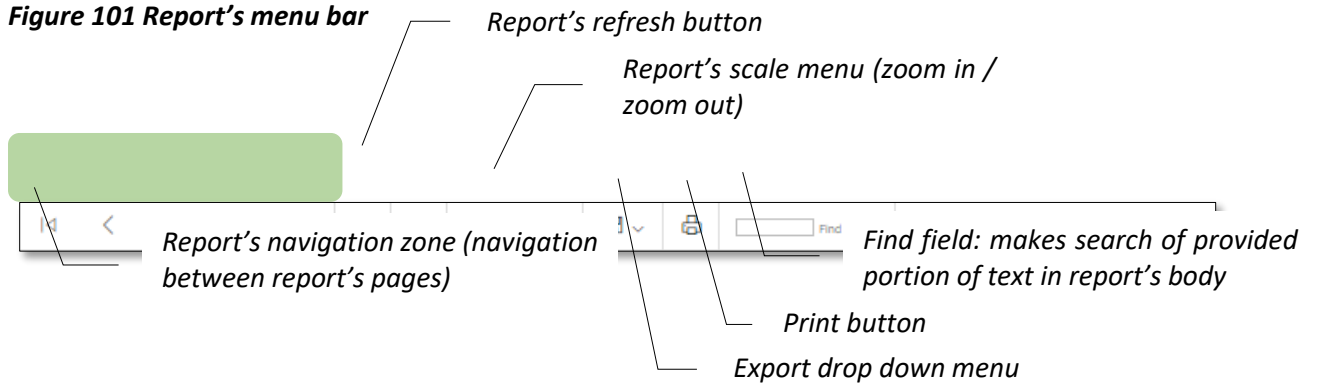| Haulier	Haulier ID	Licence No	Type	License status	Country validity, H, I, Gr, RU, A	Trip Nr	Date of departure	Date of arrival	Place of loading	Country of loading	Place of unloading	
1	2	3	4	5	6	7	8	9	10	11	12	
Balkan Trans	AL12202300014	00007	Annual	In Use	I,RUS	#2	01/02/2024	05/02/2024	Stockholm	Sweden	Tirana	A
						#6	12/02/2024	12/02/2024	Chisinau	Moldova	TIRANA	A
						#16	01/04/2024	05/04/2024	Sofia	Bulgaria	Tirana	A
						#19	21/04/2024	23/04/2024	Paris	France	Tirana	A
		00010	Annual	Available	H,I,RUS	#4	01/04/2024	01/04/2024	Ancara	Turkey	Tirana	A
						#7	01/04/2024	01/04/2024	Dortmund	Germany	Durres	A
						#10	01/04/2024	01/04/2024	Venlo	Netherlands	Tirana	A
		20003	Short-term	Expired	I,RUS	#10	01/04/2024	01/04/2024	Chisinau	Moldova	Tirana	A
		20004	Short-term	In Use	I,RUS	#2	04/04/2024	05/04/2024	Erevan	Armenia	Tirana	A

4.2   How to View Report According to Provided Criteria

In report's interface use filter zone to provide criteria that will be used for report building

Click [View Report] button

2) Click "View report" button generate report according to provided filter criteria
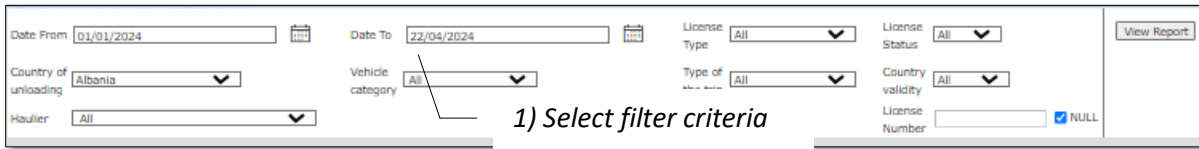
Report generated according to provided filter criteria will be displayed on your screen

To refuse from provided criteria and get back to viewing report by default characteristics click

⊖ button in report's menu bar:

Figure 103 Getting back to viewing report by default characteristics
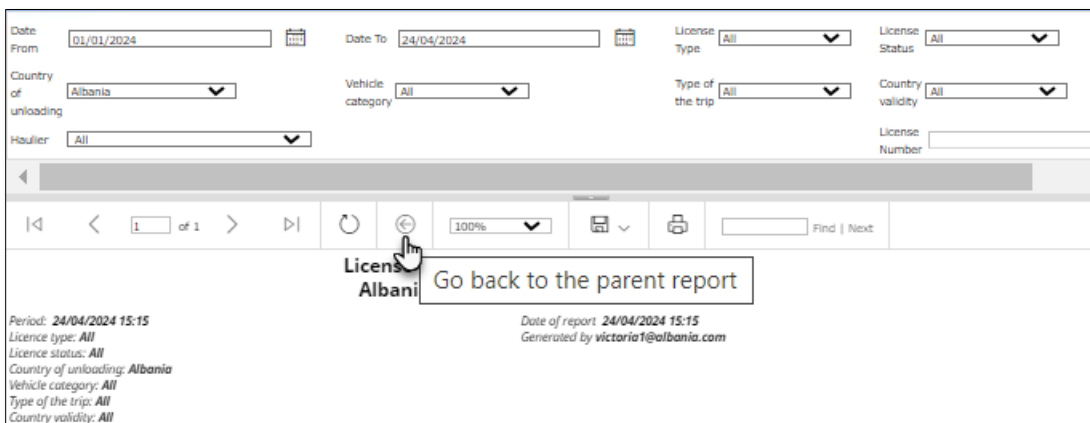
4.3   How to Navigate between Report's Pages

When your report contains more than one page, block of navigation buttons becomes active.

Block of navigation buttons is places on report's menu bar and contains following buttons:

Figure 104 Report's navigation buttons
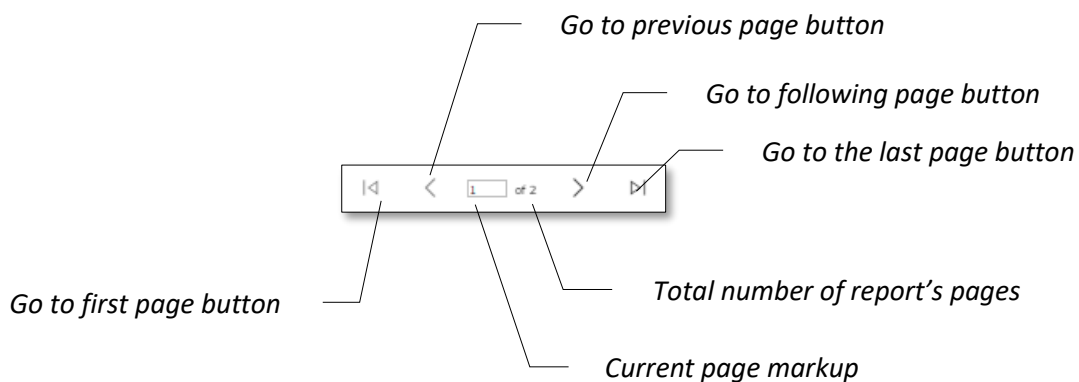
4.4 How to Export (Save) a Report

In case if there is such necessity generated report can be saved in one of stipulated formats. For this reason is used 💾⌄ button. By clicking on this button there will be displayed the list of possible formats that can be used for reports saving. One report is saved as file, it can be opened and viewed from your hard disk:

Figure 105 Report's Export
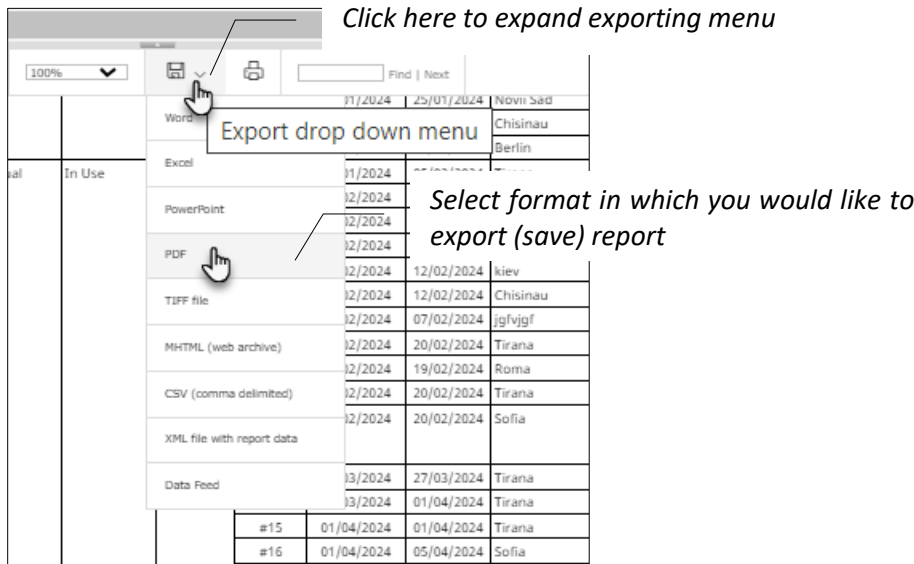
Figure 106 Viewing exported report in PDF
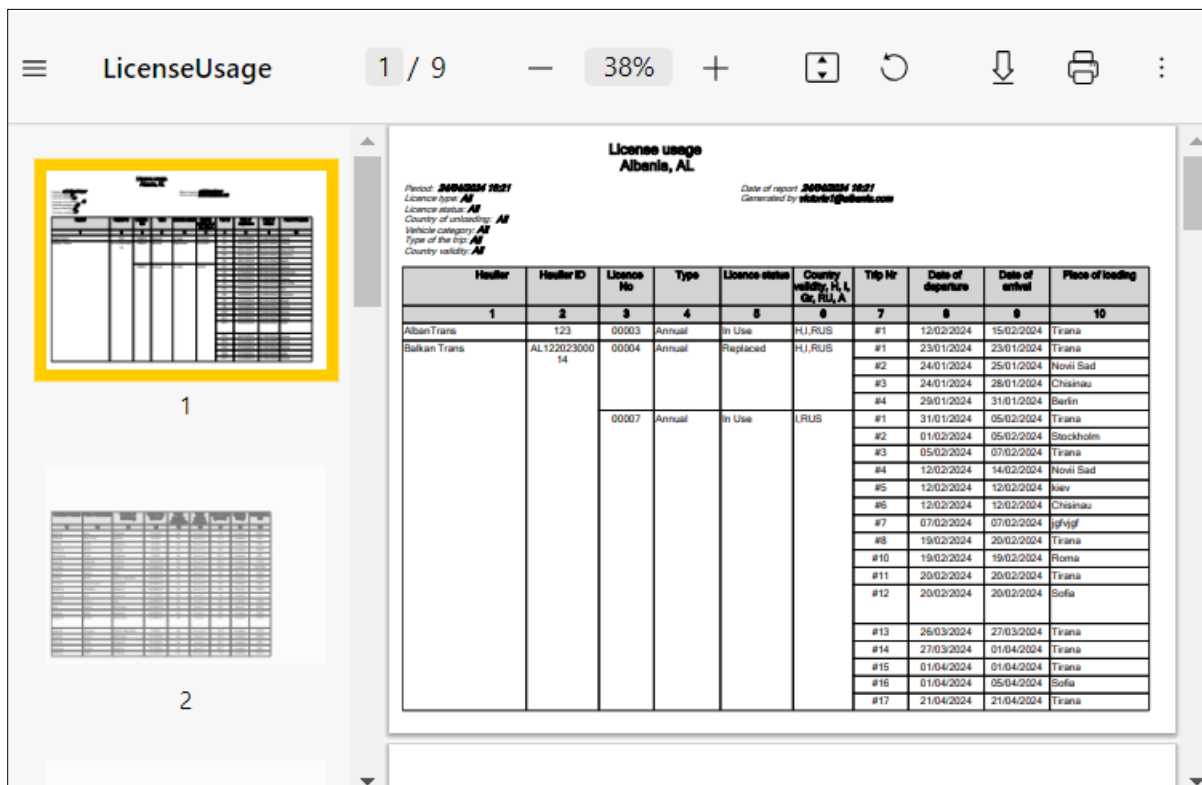
4.5   How to Maximize / Minimize Report's View

For your comfort report's viewing mode can be maximized / minimized according to necessity.

For this purpose, is used Zoom drop down menu in report's menu bar:

Figure 107 Zoom drop-down menu

Click here to expand zoom drop down menu
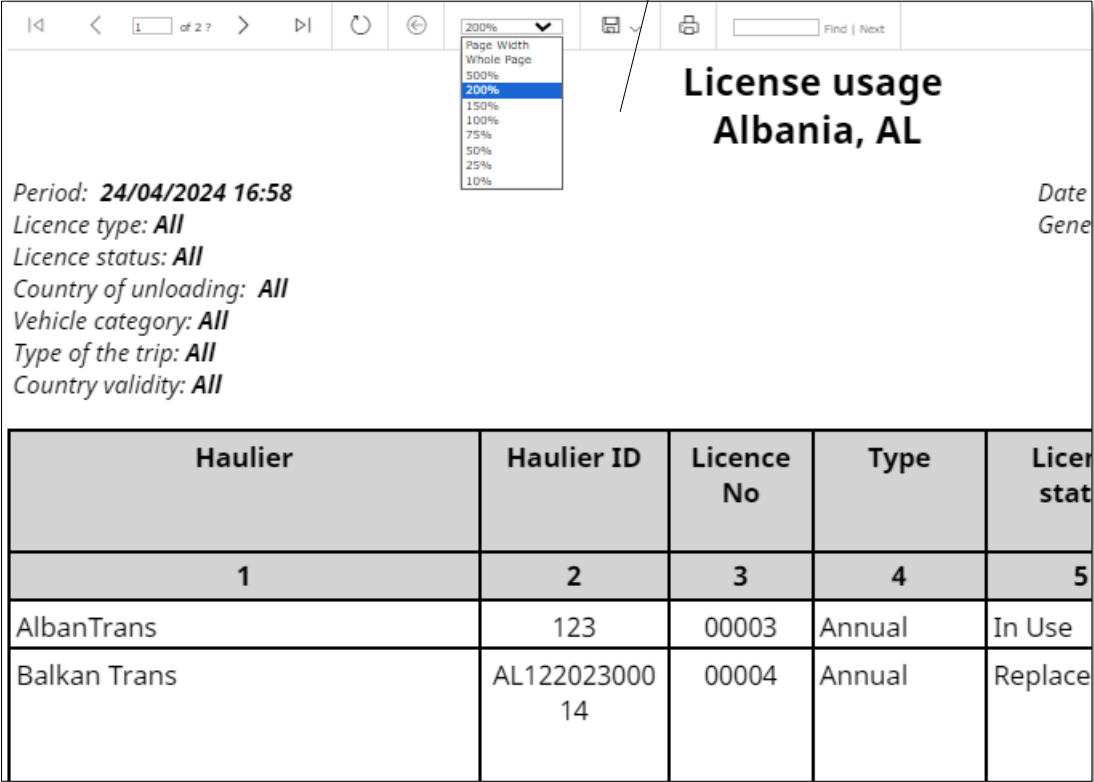
Step 1

Select maximization / minimization variant

Step 2

View report's maximized (minimized) interface

Step 3

4.6   How to Hide / Show Report's Filter Zone

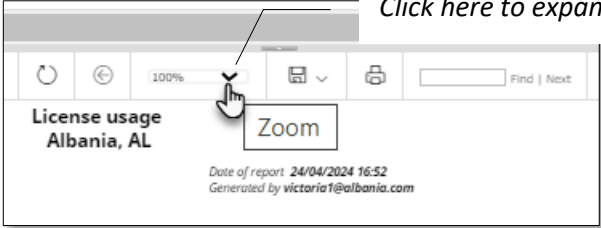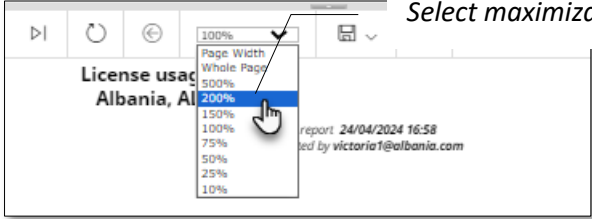By default, filter zone is always viewed in report's interface. When you already viewed report according to given parameters and don't need viewing filter zone you can hide it for the purpose of increase report's viewing aria (report's body). The way you can hide / expand filter zone is presented on figure below:

Figure 108 "Hide / Show parameters" button. Hiding / viewing report's filter zone

Filter aria is expanded (showed)

Click here to hide report's filter aria (parameters zone)

Filter aria is hided

Click here to show / expand report's filter aria (parameters zone)
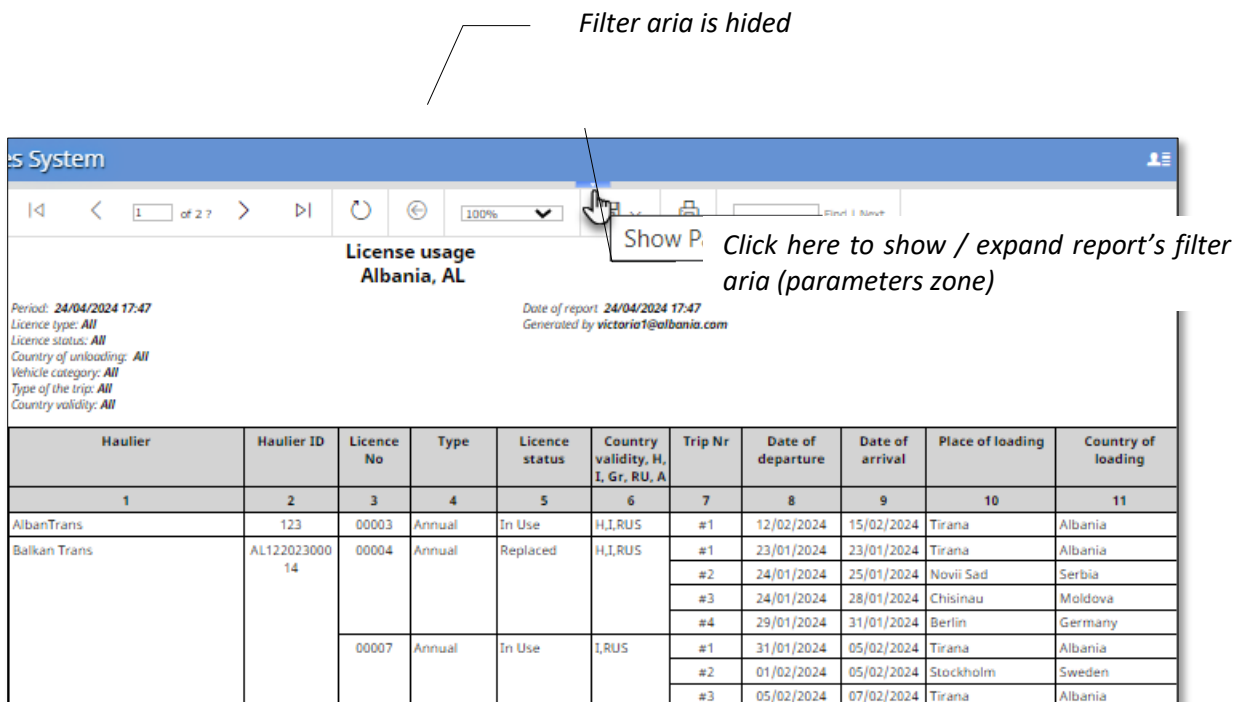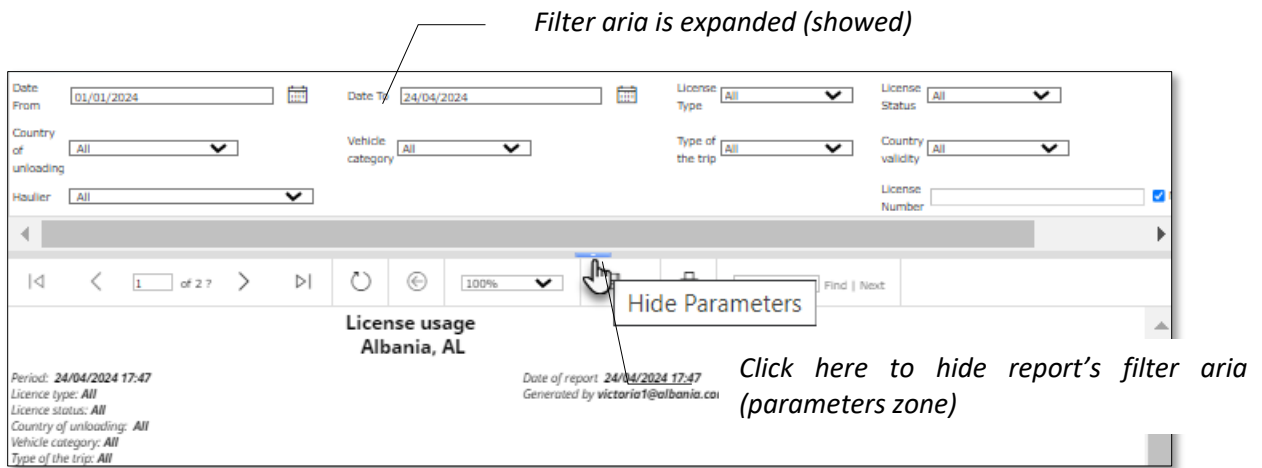
5   Incidents

Incidents menu serves for logical or functional errors reporting which users can encounter during their work in the system. Incidents can also have a character of a new functionality, question or training request. When an incident is posted by a user, developing team sees the incident record and gets measures for its quick elimination. When incident's status is changing, user that posted incident, gets informed about this fact through the email notification. In Incidents menu each user can view only those incident records that had been posted by him in person. Access to the entire list of incident records has only users with administration permissions and developing team.

Incidents can be posted in two modes:

- From the list of posted (submitted) incidents that makes part of the "Incidents" profile

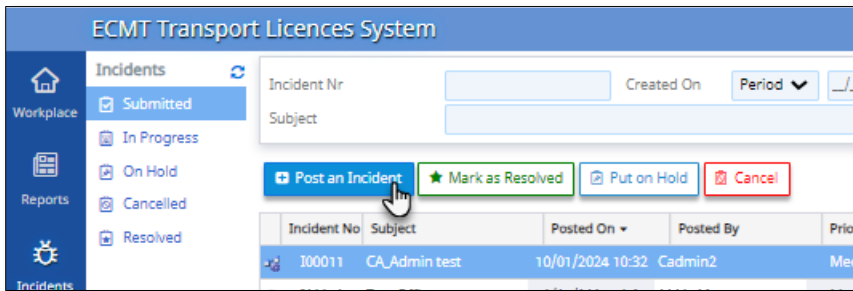- From the form's interface where an error has been discovered.

Below will be examined these ways of incident posting.

***Figure 109 Incidents menu. "Submitted" interface***

Click here to post new incident record

Click here to access Incidents profile
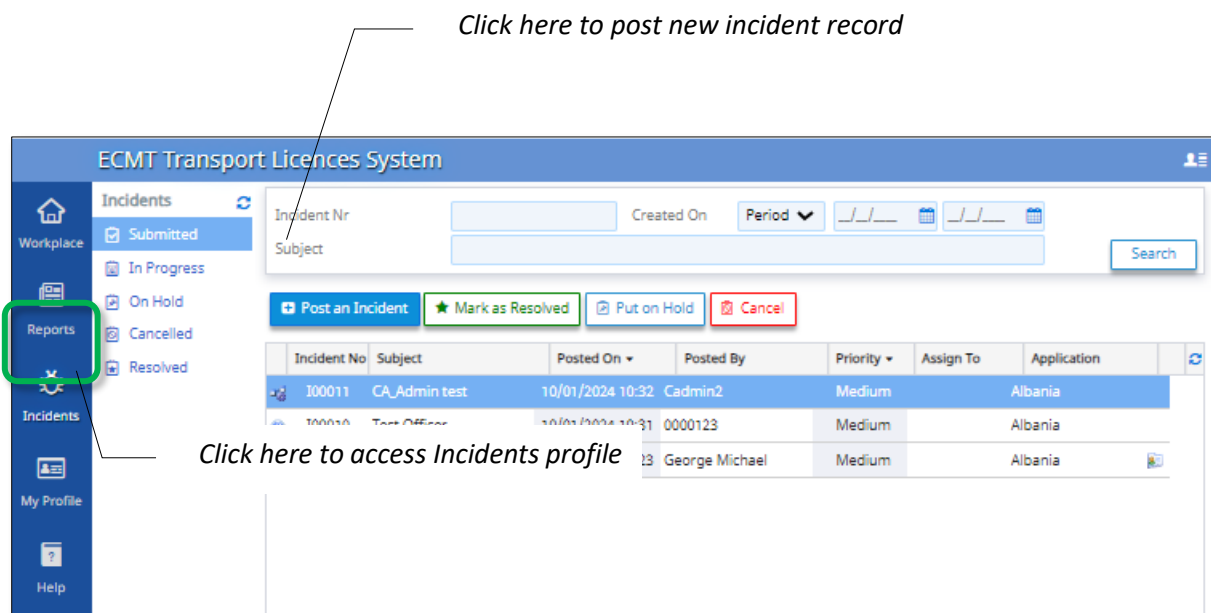
5.1   How to Post an Incident from "Incidents" Profile

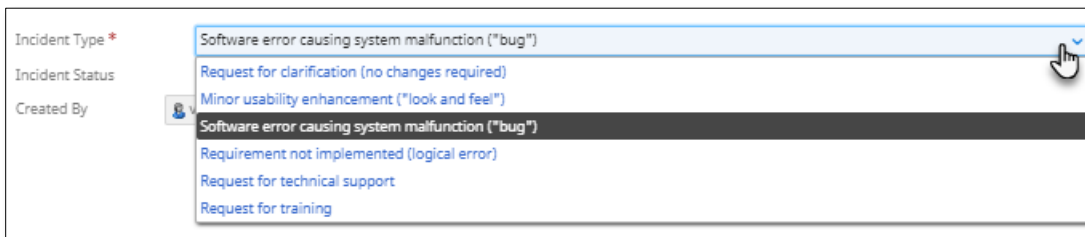In menu bar of submitted incidents click [⊞ Post an Incident] button:

In incident form that will be opened use General tab to provide info about incident's subject, description, select incident type, its priority:

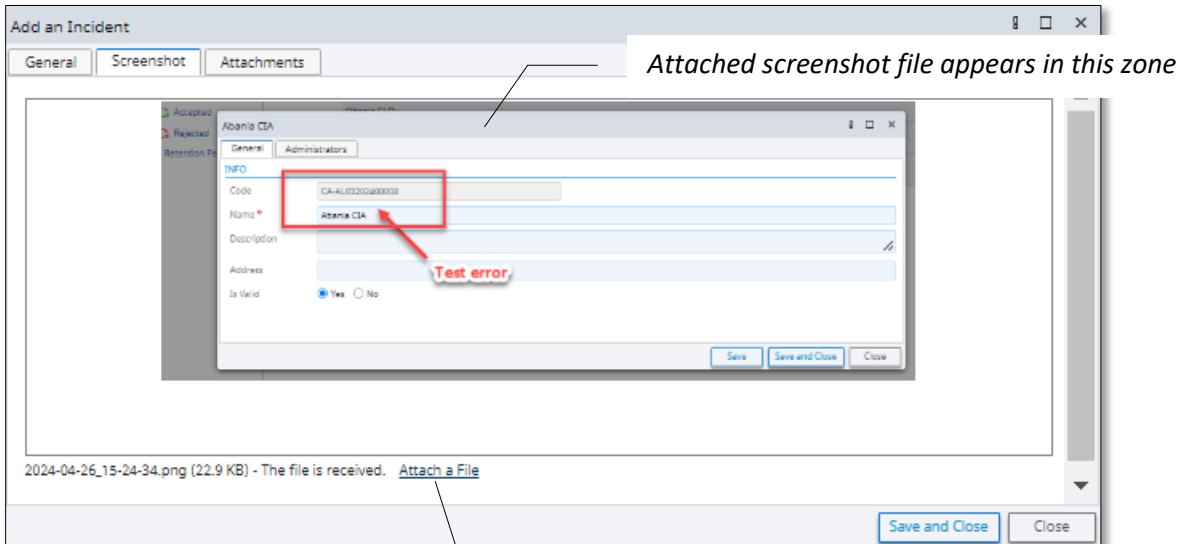*Figure 110 "Add an Incident" form. General tab*
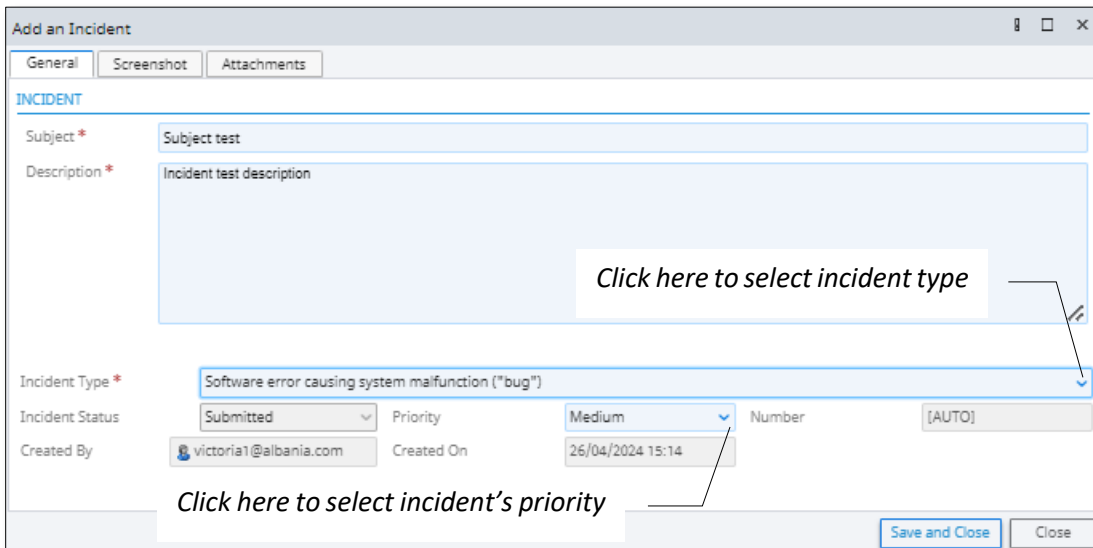
Figure 111 Incident type selection

Go to "Screenshot" tab to attach screenshot file that shows emerged problem:

Figure 112 "Add an incident" form. Screenshot tab

Attached screenshot file appears in this zone

Click here to attach screenshot of the problem describing in your incident (screenshot file must be taken and saved in advance)

In case yo want to attach move then one screenshot file to your incident, use Attachments tab:

**Figure 113 "Add an Incident" form. Attachments tab**

3) Attached file appears in the list

2) Click here to open uploading window and to select screenshot file with problem

1) Click here to add new row in attachments list

*4) Click here in case you want to delete attached file from the list*

When all data about incident have been provided click [Save and Close] button: incident record will appear in the submitted incidents list:
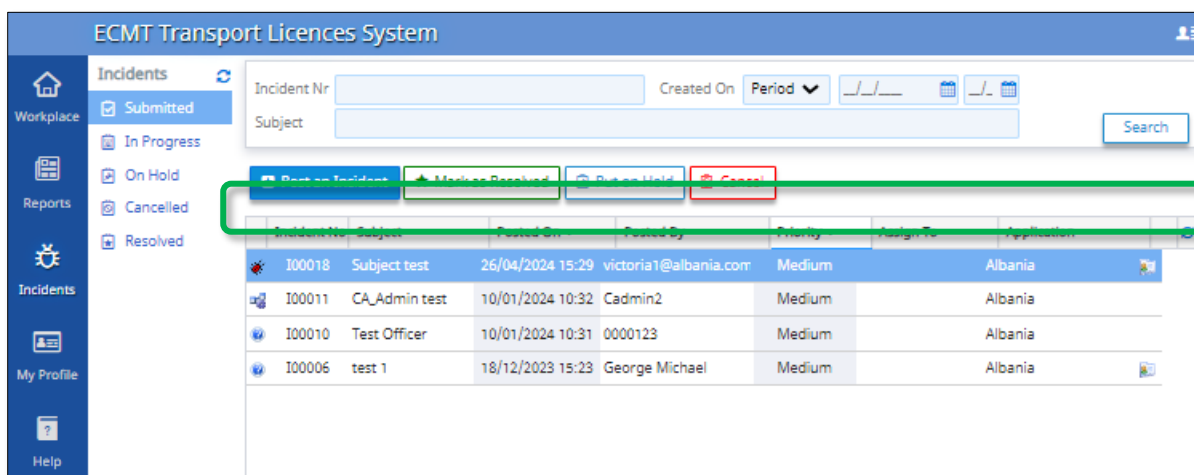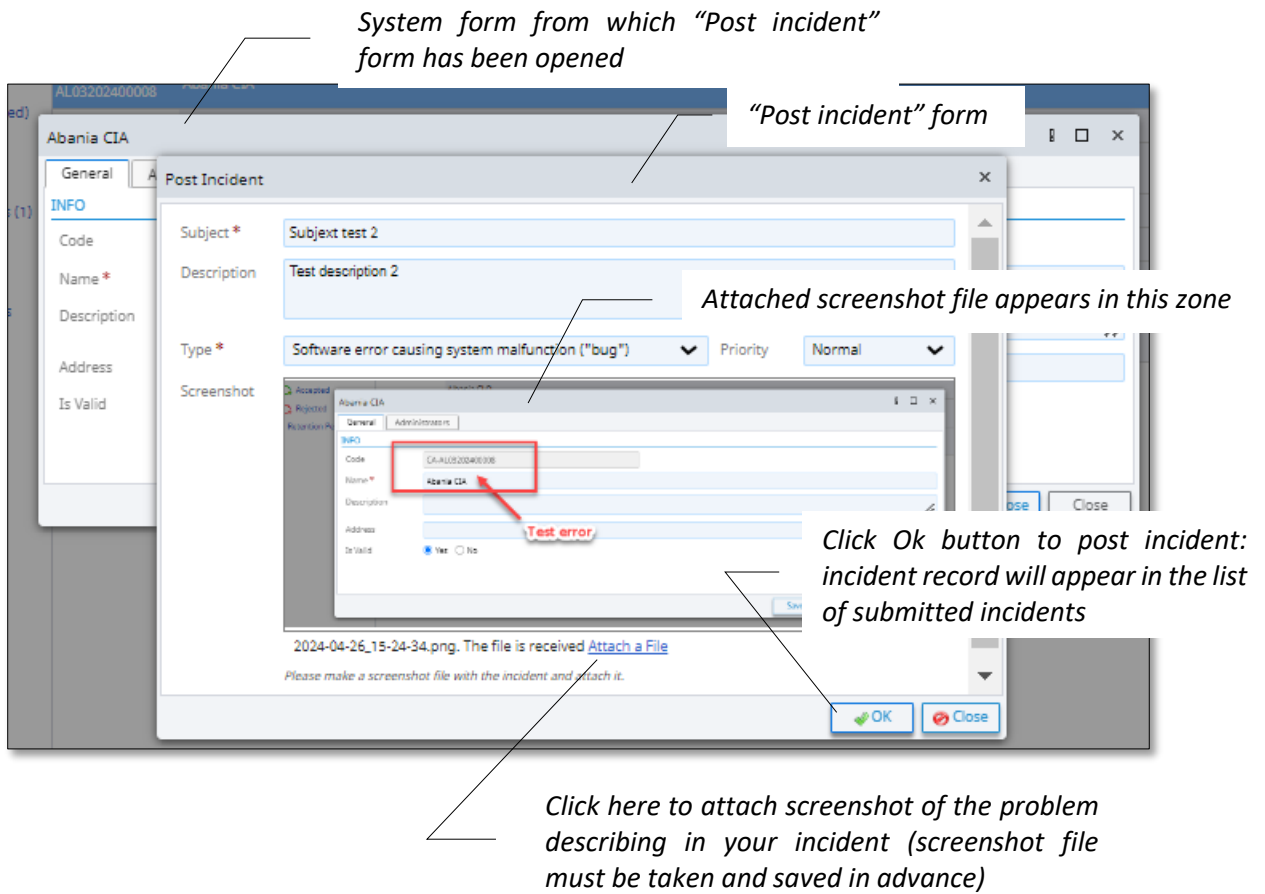
5.2 How to Post Incident from Form's Interface

In interface of any of system's forms click on ⊡ button

Figure 114 Posting incident from form's interface (incident posting button)
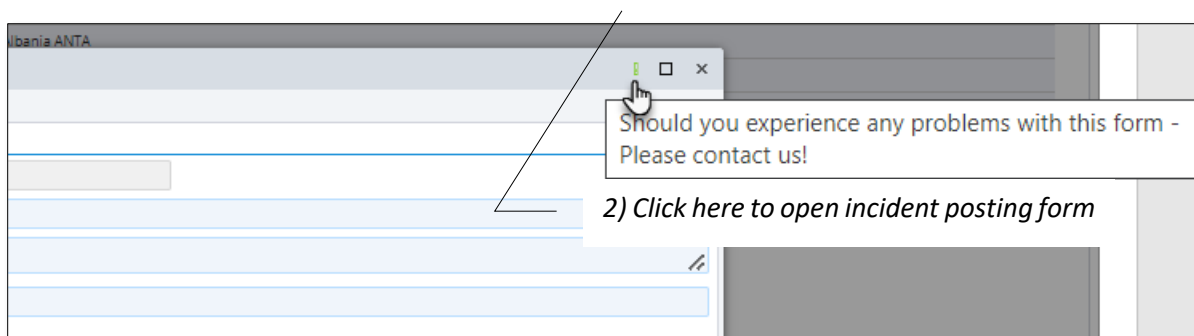
As a result on your screen will be opened "Post Incident" form where you'll be able to provide incident's data and to attach screenshot file (taken and saved on your hard disk in advance):

**Figure 115 "Post Incident" form opened from system form's interface**

System form from which "Post incident" form has been opened

"Post incident" form

Attached screenshot file appears in this zone

Click Ok button to post incident: incident record will appear in the list of submitted incidents

Click here to attach screenshot of the problem describing in your incident (screenshot file must be taken and saved in advance)

5.3   How to Change Incident's Status

Being at any of incident lists click on any of available change status buttons: ⭐ Mark as Resolved   or

📄 Put on Hold   (incident record must be selected in advance):
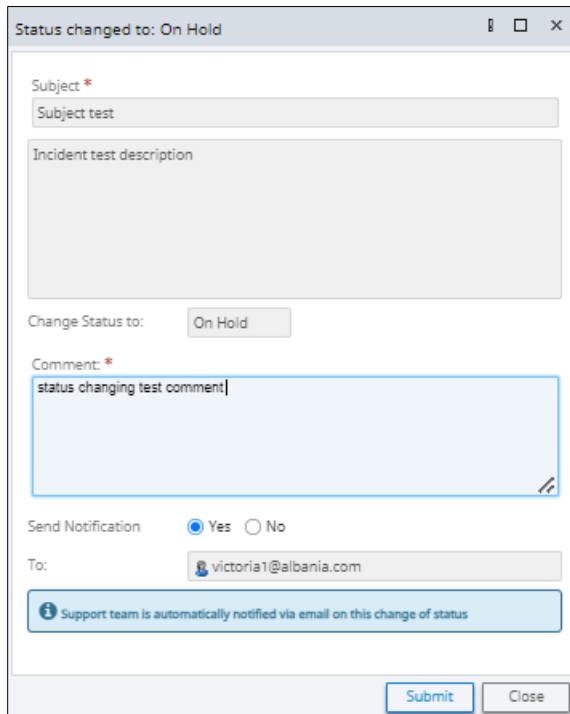
Figure 116 Start of incident status changing process
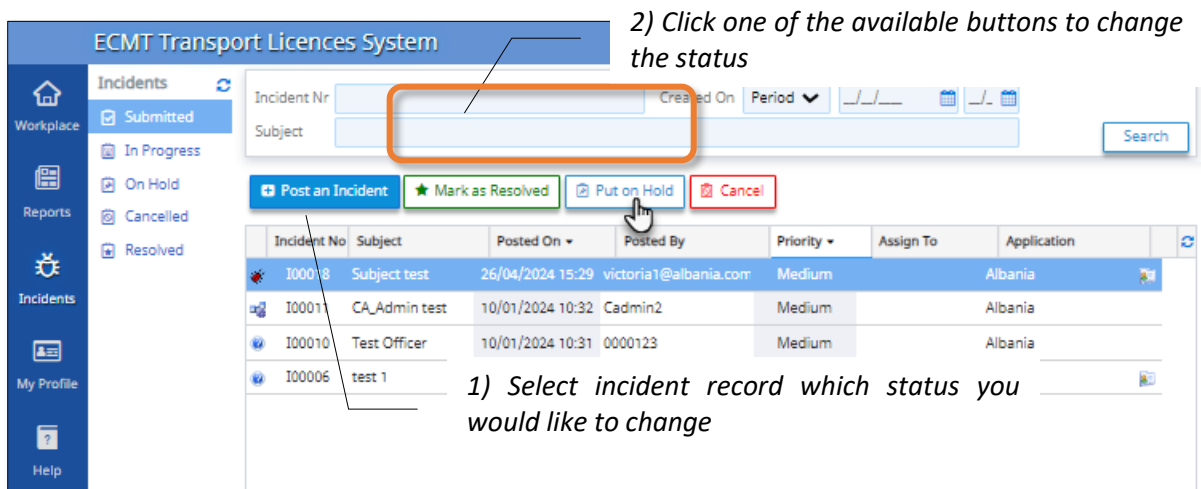
In "Status changing" form that will be opened provide status changing comment, use "Send notification" radio-buttons to define whether email notification about status changing would be sent to user who posted the incident:

Figure 117 Status changing form

Click on [Submit] button: status changing form will be closed, and incident record will be moved in one of the incident list depending on its new status:
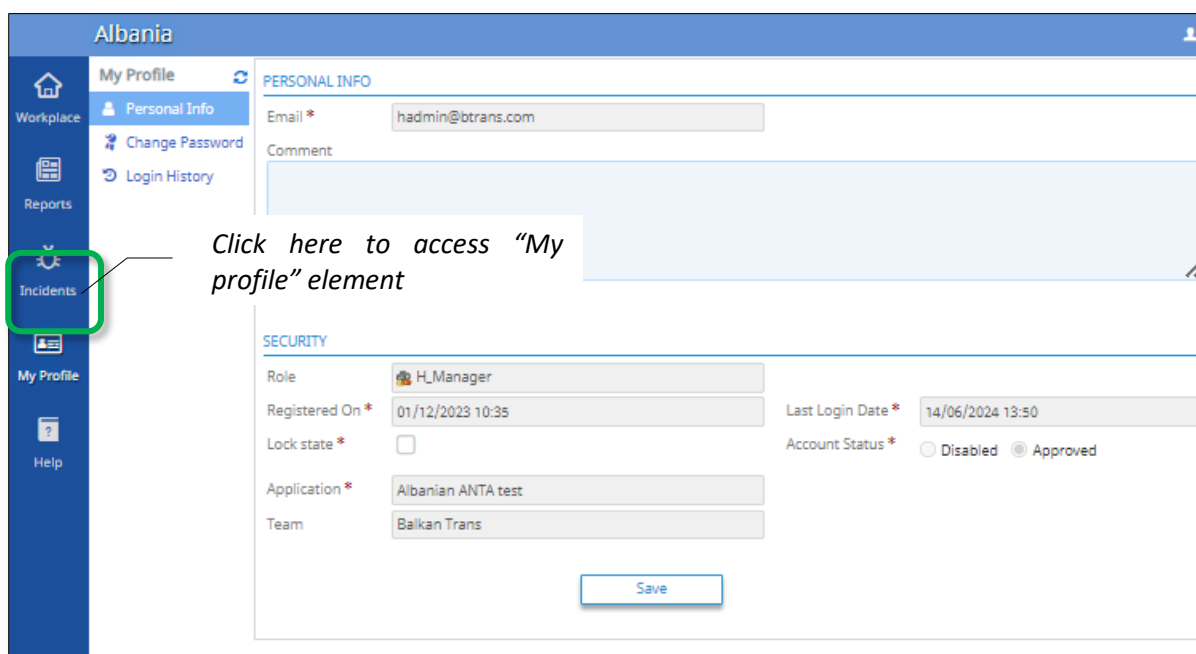
6 My Profile

"My profile" menu is meant for storing your personal data as a system user, password changing, viewing your login history.

6.1 "My profile" Elements

"My profile" is composed from following interface elements:

- **Personal Info** – interface where personal info and security data are stored. Here you can add your address details, provide your first name and last name data. Once any changes in your personal info have been done don't forget to click [Save]

Figure 118 "My profile". "Personal info" interface

- **Change password** – interface with set of fields that you can use to change your current password

Figure 119 "My profile". "Change Password" interface

- **Login Activity History** – the list of your last authentications in the system. Each authentication record contains date, time, login action that took place, IP address of the device that has been used to login the system:

Figure 120 "My profile". "Login history" list