Polymeo

by Heptacube

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Version Tracking

Version	Modifications
1.	First draft.
2.	Restructuring and several additions.
2.1	Formatting and spelling/grammar corrections.
3.	Restructuring and added categories.
3.1	Formatting and spelling/grammar corrections.
3.2	Added information on password recovery and troubleshooting.

1. Introduction

Polymeo is a complete, user-friendly, business-oriented web application providing powerful management tools to businesses for addressing their diverse management needs.

The three main services are finances, human resources and file archiving.

By providing an access point for both employees and clients, Polymeo encompasses all the requirements for successful project management.

1.1 Home

The Polymeo home page is simple and intuitive. Upon loading the page, he user can fill in the “Username” and “Password” fields to connect to the database. These credentials are provided by email when registering to Polymeo.

Under these fields are links to access Heptacube’s Web site and the “About Polymeo” page.

1.2 Navigation

1.2.1 Main menu

Once connected to the application, the user is greeted with a welcome message (configurable by an administrator) under which there are links labeled “Finances”, “Inventory”, “Employees”, “Publications” and “Address Book”.

Another menu links to “Preferences”, “PhpMyAdmin”, “Server monitoring” and “Domains”.

The top banner is customizable by an administrator and the page also shows the date.

1.2.2 In the Application

When navigating in sections of the application, the bottom part of the menu shows a list of currently online users as well “Menu” and “Exit” buttons to get back to the main menu and exit Polymeo safely, respectively.

When getting to the “Finances”, “Employees”, “Publications” or “Address Book” sections, you are greeted with links to pages corresponding to specific functionalities. All of these pages are described further in this document.

1.3 Security

1.3.1 User types and restrictions

Polymeo integrates 4 types of users. All users have different access and are defined with the default values:

User type	Level	Sections
Administrator	God Like	All sections
Advisor	10	All sections except for the administration panel.
Employe	5	All sections except business sensitive information (financial & pays).
Customer	N/A	Customer access point

2. Finances

2.1 Description

This section of Polymeo deals with critical and essential financial tools for any well-maintained business.

Monitoring project finances and resource use is necessary when trying to maximize the efficiency and profitability of any project. Well-tracked accounts receivable help growing businesses to maintain a good cash flow and flourish. Polymeo offers a complete package of solutions: internal resource fund allocations, regional grants and taxes as well as online client account history and activities.

The application's simple user interface makes it easy to navigate and use its many functionalities. From now on, there will be no need to use multiple software and databases to keep track of clients and accounts. With Polymeo, all of these operations can be done through the same web application, accessible anywhere where there is a computer with access to the Internet. There is no need to install any software.

Polymeo allows daily tracking of business accounts through an automated, configurable, practical and easy-to-use email system. Furthermore, clients can be given access to the database in order to view their statement of account directly from the Web application.

2.2 Incomes

2.2.1 Customers and Projects

To use the best of Polymeo, all customers (corporation or society) must be entered in the finance section. Customers configured in this section will be use in many other section and reports of the application.

2.2.2 The Contract File

A contract file is has necessary information to be valid. The budget unit and the source can refer to the invoice number or the project type and number must be specified.

2.2.3 Statistics and Reports

Various reports are available in the finance section.

Available reports	Incoming reports (2011)
Customers, project and contract listing	Payments and reconciliation reports
Inventory and assets listing	
Contracts obtained by year, semester, month and customer Projects expenses by year, semester and employee Growth rate and business evolution	

3. Human Resources

3.1 Description

Software industries have to track time. Coordinating large teams on many projects can be difficult without proper human resources management tools. Lacking these mechanisms can bring about the failure of a project altogether. The "Employees" section of Polymeo provides important tools for the management of human resources.

An employee database is included in Polymeo. This database contains information related to each employee such as his or her contact information. Employees can also consult this section to view and print their pay slips. This is an effective way for a company to reduce its management and printing costs.

Finally, an essential tool for effective project management is Polymeo's ticket system, which allows for accurate tracking of employee task completion by project. For each employee task, a ticket can be generated to keep track of the work done and the number of hours spent. This ticket can also contain information such as difficulties encountered or notes for other team members. Clients can also be given access to view the tickets related to their projects, allowing them to monitor progress remotely. This is a great way to boost a company's productivity while increasing its clients' confidence.

3.2 Employees

3.2.1 Add new employee

This page is used to add a new employee to Polymeo’s list of employees/users.

The fist field is for the personnel number. You can enter the personnel number any way you want, as long as it is a combination of letters and/or numbers.

Fields labeled “Name”, “Forename” and “Email” are for entering the name, forename and email address of the employee.

The employee’s title must be selected from the drop-down menu. Available options are determined by an administrator.

Select the month and year of the employee’s arrival in the company from the drop-down menus.

As explained on the bottom of the page, the last two fields are special:

- By convention, the username is the first letter of the forename followed by the last name, i.e. “John Smith” becomes “jsmith”.
- The access code is unique to each user and is generated randomly. It will be used by the employee for electronic consultation of his or her file.

3.2.2 Consult/Modify List

This page is a list of all employees / Polymeo users sorted in alphabetical order of name and includes email, title and phone number for each one.

Clicking on a name brings up a page with additional information on that employee. These include, on top of the info available on the employees list page, personnel number, username and access code. It is also possible to provide a nickname to the user, and to add a picture or image for the employee by providing its URL.

The content of these fields is modifiable. On the bottom of the page, the “Cancel” button voids the changes that have been entered but not saved and the “Save” button saves the new information entered.

3.3 Deductions

In the Human Resources section, all governmental deductions can be handled.

The deductions list and reports include lists by year or employee, pay slips, payroll summaries and reports to the government.

3.4 Tickets

The ticket system can be used in different ways, depending on the workflow of the company that uses Polymeo.

On one hand, en employee can use it to enter in the database the tasks he or she executes so that the employer and the clients’ whose projects he or she is working on can know the details of the work progress.

On the other hand, the employer or a supervisor can assign tasks to an employee in the form of a ticket, so that the employee can receive work orders from anywhere at any time.

3.4.1 Create a ticket

To assign a ticket to an employee, select the according user, client and project from the drop-down menus. Administrators manage the content of these menus.

The “Client” and “Program” options also determine who will have access to the information relative to this ticket.

The text entered in the field “Details of the work” explains the task to be performed by the employee. This text will appear in the “List of Tickets” with the rest of the information from the ticket. It is important to be precise because this text will serve as a reference to the client to know what is being done for his project.

When all fields are properly completed, click “Save” to send the ticket by email to the selected user/employee. This email includes all the information entered by the ticket opener as well as a link for the user to go and close the ticket once it has been completed.

When the user gets to Polymeo after the ticket is complete, he or she enters the number of hour taken for the completion of the task and has the option of adding a comment on the ticket.

3.4.2 List of tickets

The list of tickets has five columns for the five types of information relative to each ticket: starting time, employee, client, details and hours. Tickets are in chronological order of starting time, the most recent ticket being on top of the list. Important to note is that only the most recent tickets appear on that page.

Starting date and time are determined automatically by the application and correspond to the moment of creation of the ticket by a user.

The “Employee”, “Client” and “Details” columns show the information entered in the corresponding fields upon creation of the ticket.

The “Hours” column shows the amount of hours spent on each ticket, as indicated by the employee upon closing the ticket.

A non-completed ticket will appear in bold characters and the “Hours” column will show a zero.

3.5 Reports

3.5.1 Pay Statements

Polymeo can generate printable pay slips for employees. As long as all deductions are entered properly in the deductions section.

3.5.2 TPZ-1015

This form is for Quebec source deductions monthly report. It summarizes all deductions that must be paid back to the Quebec government.

4. File Archiving

4.1 Description

Having documentation always accessible and centralized is key to saving time for both you and your employees. For this reason, Polymeo includes a centralized file archiving system. More than an online file storing system, Polymeo's publication tool allows its users to publish various documents, which can be consulted by their superiors and peers.

This functionality allows your business to publish company memos, updates on company activities and other relevant documents in a way that is easily accessible to everyone in the company. A powerful search function enables easy accessibility to documents that have been archived. Of course, this system includes access restriction systems for controlling access to sensitive documents.

4.2 Publications

4.2.1 Consult Publications Table

This page shows a list of the documents published during the current year. In the upper part of the page are links to previous years. To get more details about a publication, click on its number.

The details page has more information about the publication, as submitted by its publisher: date, author, title/subject, reference, volume, page number, type of document and summary. Authorized users can modify this information. It is also possible to download an attached PDF or delete it from the database. If there is no attached file, these links are replaced by an option to upload a PDF file. Finally, a button allows for the deletion of the whole publication and another one is used to save modifications.

The “Print version” link strips the page of menus and header to print a simple version of the list.

4.2.2 Add a Publication

This page allows for posting a new publication. Simply fill in the date, author, title/subject, reference, volume, page number, document type and summary fields and click “Add”.

The next page allows for attaching a PDF file to the publication, adding another publication, or going back to consult the list of publications.

To attach a PDF file, click on “Choose a file”, select it in the dialog box and press “Send”.

5. Address Book

5.1 Description

The address book is handy as an online tool for managing contacts.

5.2 Contacts

5.2.1 Add a Contact

Fill in the fields and click “Save” to add a new contact.

5.2.2 Consult Address Book

This page lists all address book entries in alphabetic order of name. All contact info is available from this page.

The “Print version” link strips the page of menus and header to print a simple version of the list.

5.2.3 Modify a Contact

Select an entry from the drop-down menu and click “Open”. The following page is the same as the ‘Add a Contact’ page, but fields are already filled in. Press “Save” once modifications are complete.

5.2.4 Delete a Contact

This feature has not been implemented yet.

6. Other Functions

6.1 Preferences

This page allows for activating or deactivating SSL encryption (Secure Sockets Layer) on the active account.

The user can also add an icon to be used with his or her username.

6.2 Domains

This page lists all domains and corresponding information: domain name, renewal date and registrar. An authorized user can click on a domain name to modify this information.

Below the list, a link allows for the creation of a new domain. The page is the same as the modifications page: fill in the “Domain”, “Renewal date” and “Registrar”, and then click “Save” to keep the changes.

6.3 Password recovery

The password recovery script is available on the page *lost.php* (or *perdu.php* for the French version), i.e. at *http://www.example.com/lost.php*. Simply type in a username in the text field and click the button to send the user an email containing his new password.

7. Troubleshooting

Q: I do not appear in the list of employees.

A: The administrator must create your file in the employees section and make sure the "active" field is set properly.

Q: The login window is not appearing and the page is telling me an error occurred, what am I doing wrong?

A: The URL history is using an expired session key. In the address bar of your browser, remove everything after the tailing slash of the main domain (i.e. everything after *http://www.example.com/*), and then reload the page. You might be asked to re-enter your login information.