

Module – Outside business activities – Superusers

The module helps manage the declaration, analysis, update, and closure of outside business activities (OBA). This guide covers the module functionalities available to superusers.

Configuring controls in the Outside business activities module

The Outside business activities module features three controls:

- **Outside business activity request (new):** to declare any new OBA.
- **Outside business activity request (update):** to declare an update to a previously declared OBA.
- **Closing an outside activity:** to close a previously declared OBA.

The above three controls must always be active to enable users to declare, update or close their OBA.

STEP 1

Navigate to Controls configuration, under **Configuration** → **Controls** from the platform menu.

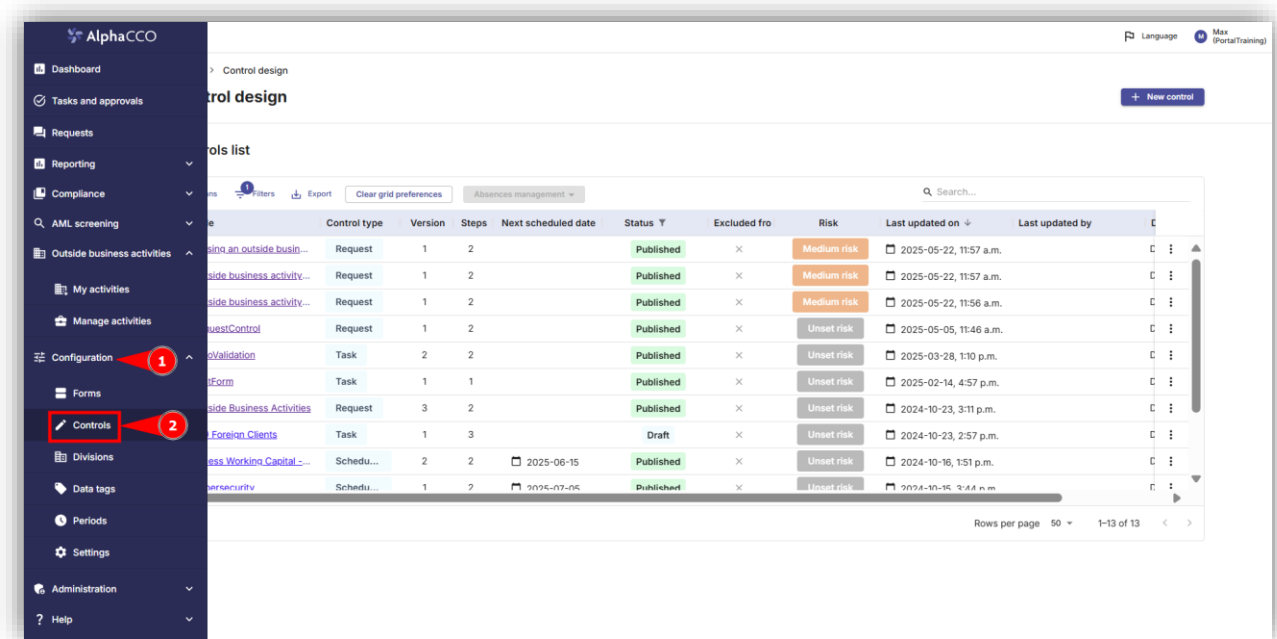


Figure 1: Controls list

STEP 2

Type "outside activity" in the search field and verify the controls' status.

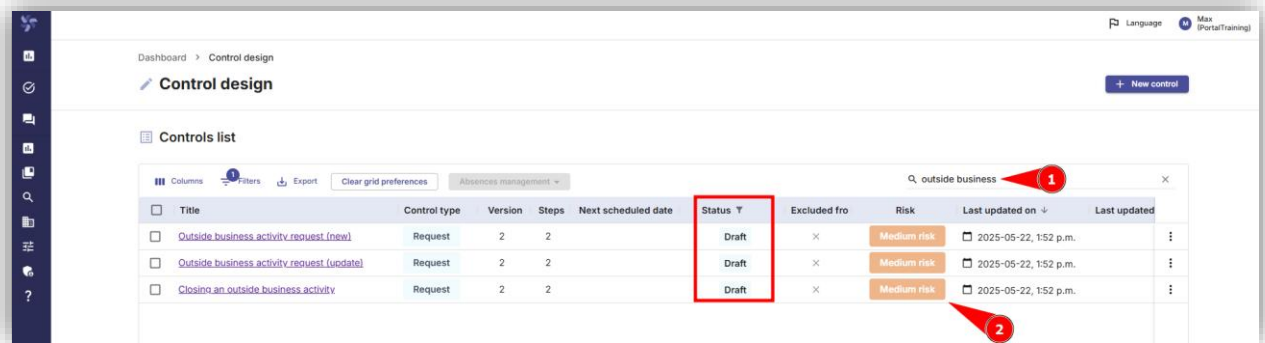


Figure 2: Filtered list of controls to show Outside business activities module controls

STEP 3

Verify assignments, make any changes to the form according to your needs, and validate the decision step settings (approval) for each control. The default approver is the user's designated manager. You may select a specific user as approver for each control.

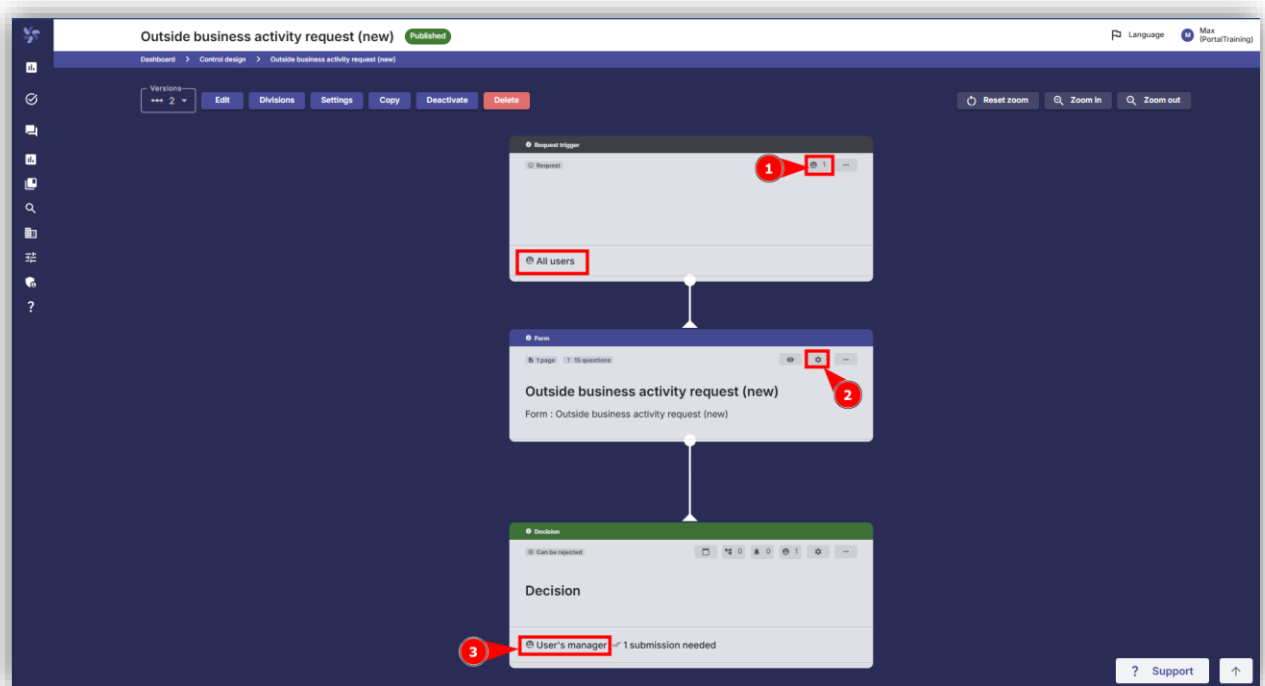


Figure 3: Control workflow view, with request assignment, form settings, and decision step user manager assignment

STEP 4

Once ready, if the control is in "Draft" mode, click on **Publish** to activate it. Repeat the above steps for the other two controls before publishing them.

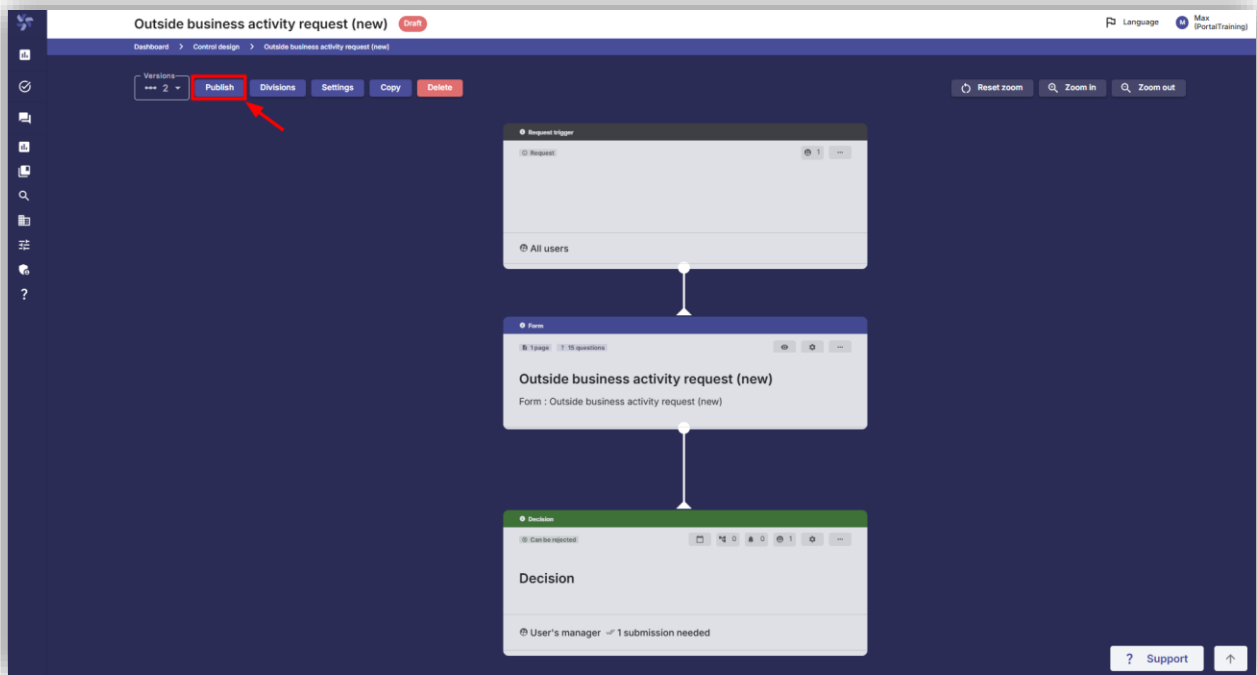


Figure 4: Activating control using Publish button

Note: If the user's manager is the designated approver in all three controls, it must be specified in the **User management** section (under Administration, Users from the menu).

However, if a separate user is configured as approver in the controls, the approval task will be assigned to that user, thus specifying the user's manager is not required.

Designating a manager for each user

STEP 1

To designate a user's manager, navigate to user management under **Administration** → **Users** from the menu.

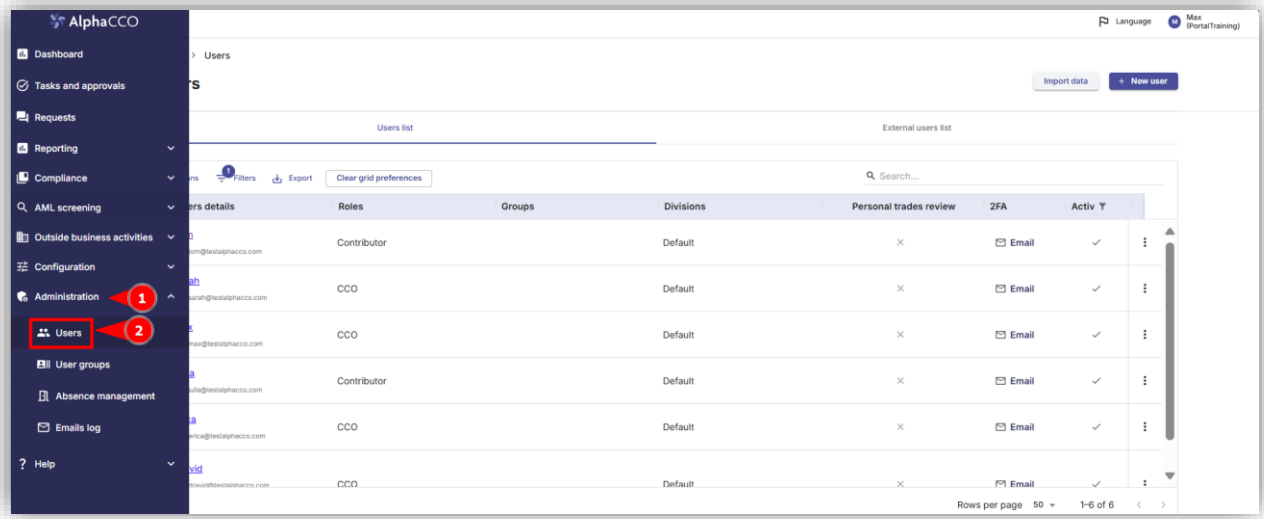


Figure 5: User management

STEP 2

In the user profile, select the manager and click on **Save changes** to finish.

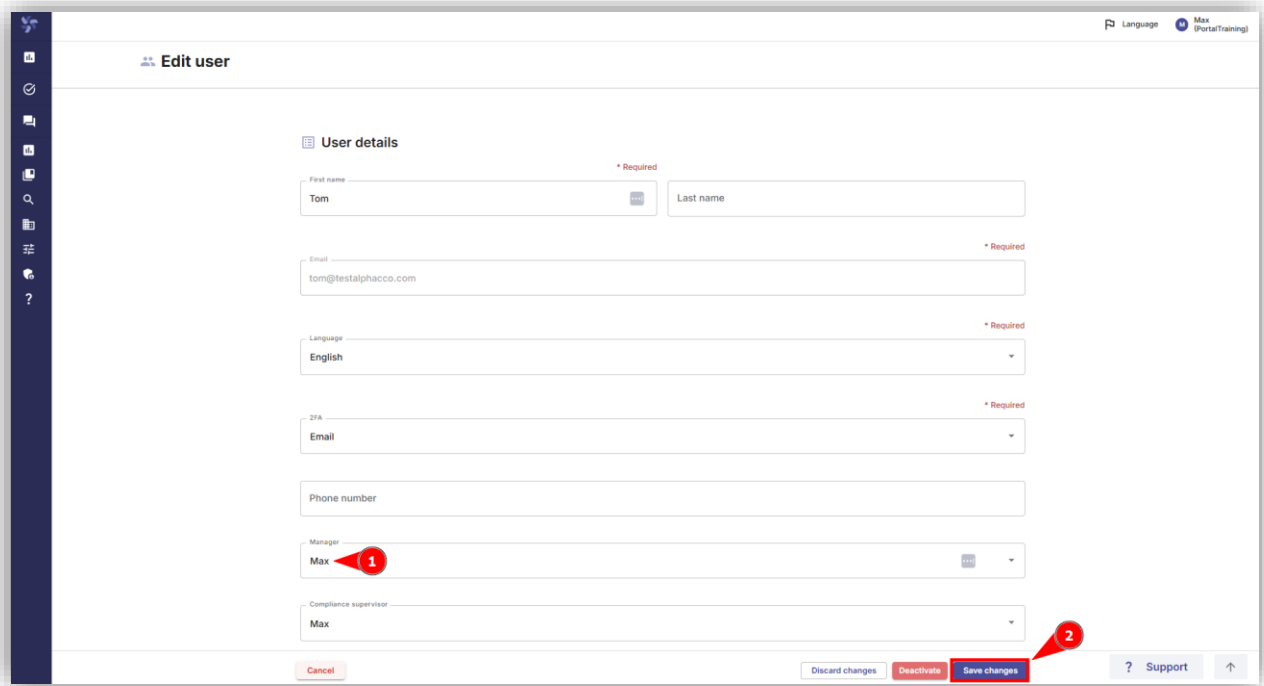


Figure 6: User profile displaying a designated manager

Managing OBA

The **Manage activities** section provides centralized tracking of OBA, whether in progress or completed.

STEP 1

Navigate to OBA management, under **Outside business activities** → **Manage activities**.

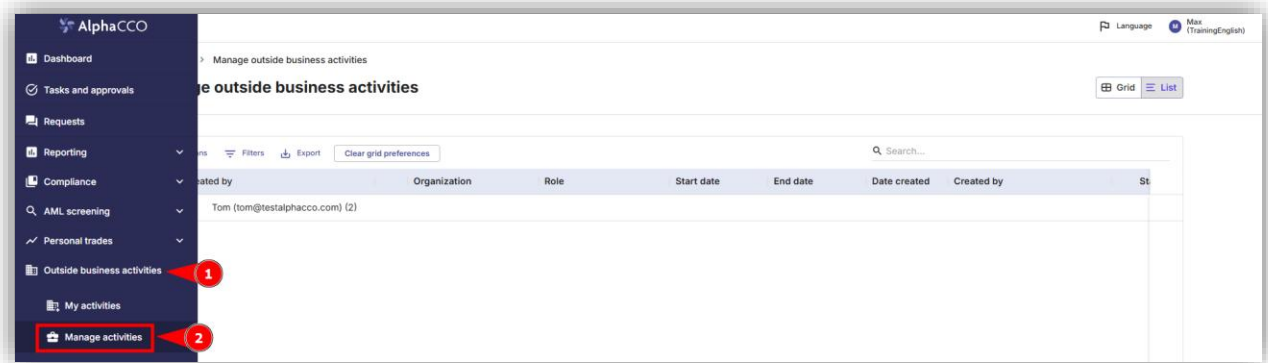


Figure 7: Outside activity management – list view

STEP 2

For a grouped or detailed display of OBA, click on the **List** or **Grid** button. Use the **Columns**, **Filters** and **Export** buttons to show or hide columns, filter the displayed results, or export the list of OBA in Excel format.

You may search for an OBA using the search field using a keyword.

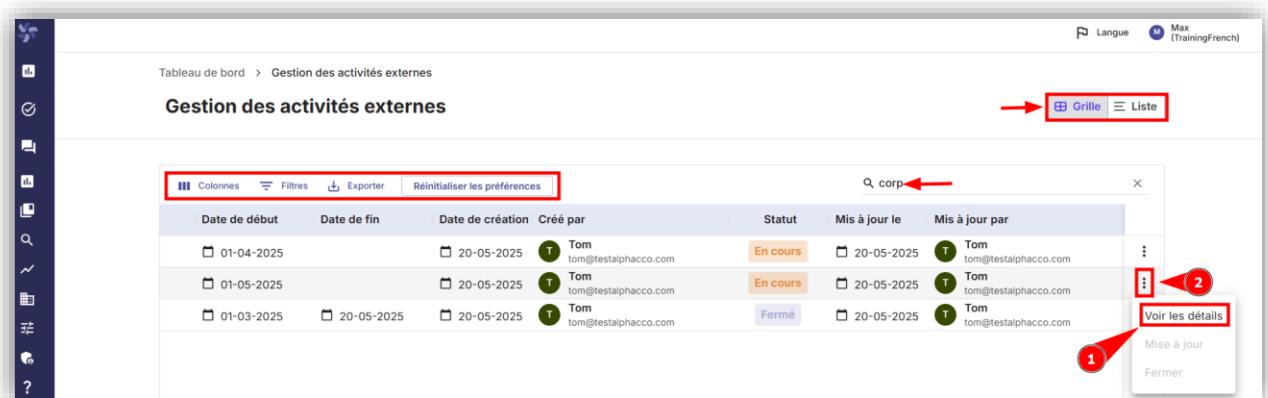


Figure 8: OBA management – grid view

STEP 3

To view an OBA’s details, click on the options button at the end of the line, then on **View details**.

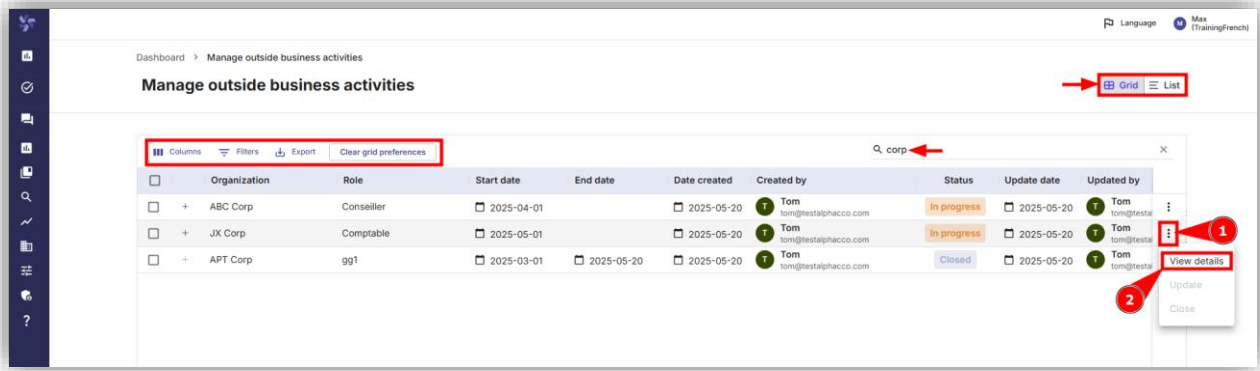


Figure 9: Option button, View details of an OBA

STEP 4

On the displayed screen, you may view the OBA’s details, as well as its approval and overall status. An OBA has the status **In progress** until it is completed and closed.

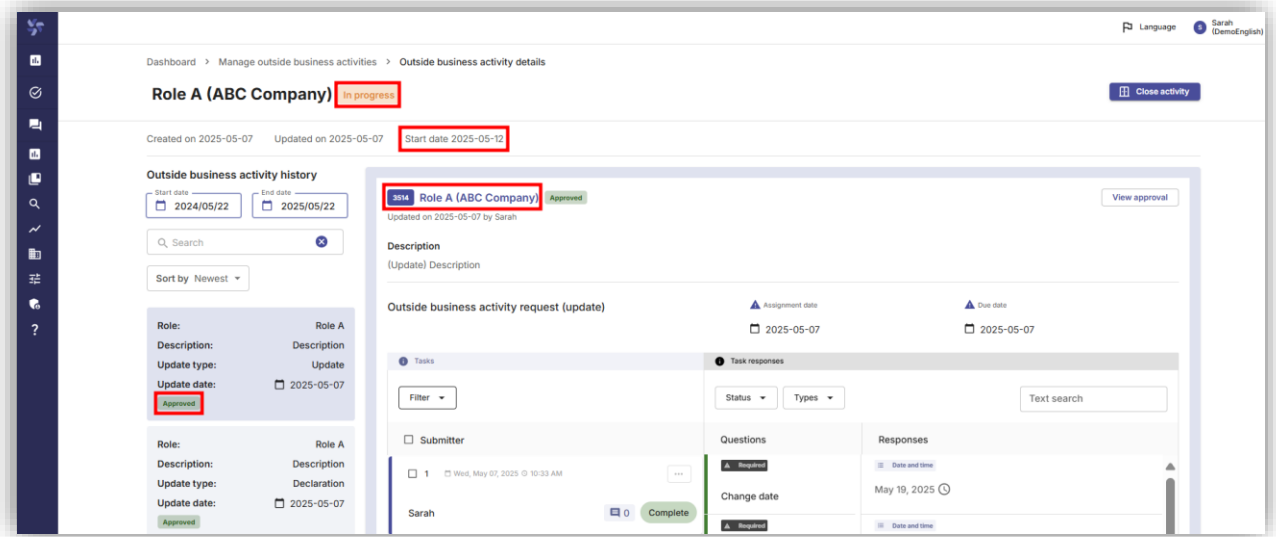


Figure 10: Details of an OBA

Viewing all OBAs

All active and closed OBAs can be viewed in the platform.

STEP 1

To view all your OBAs, go to **Outside Business Activities** → **My activities**.

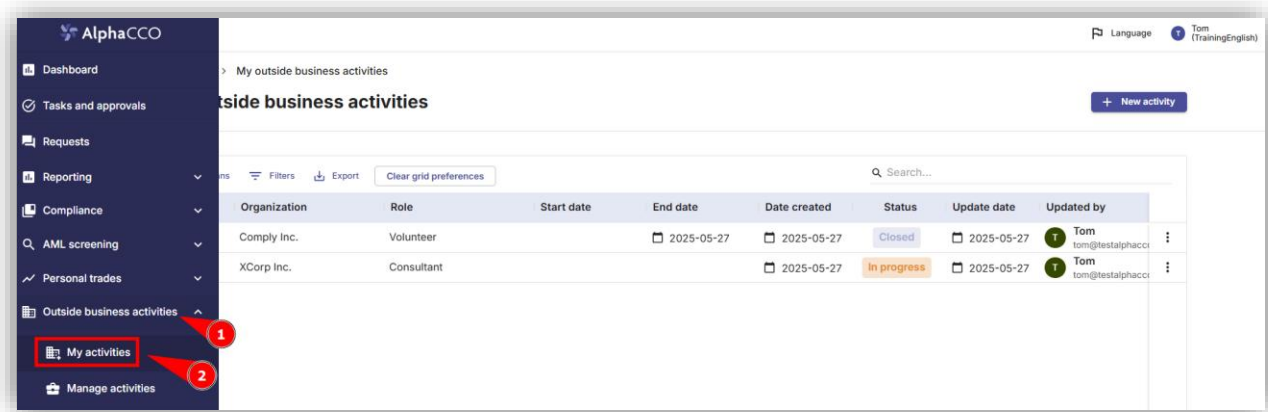


Figure 11: Viewing OBAs

STEP 2

All your OBAs are displayed, use the **Columns**, **Filters** and **Export** buttons to show or hide columns, filter the displayed results, or export the list of OBA in Excel format.

You may search for an OBA using the search field using a keyword.

Unfold the OBA to view a brief description, status and approval status. An OBA can only be unfolded if it has been either updated or closed.

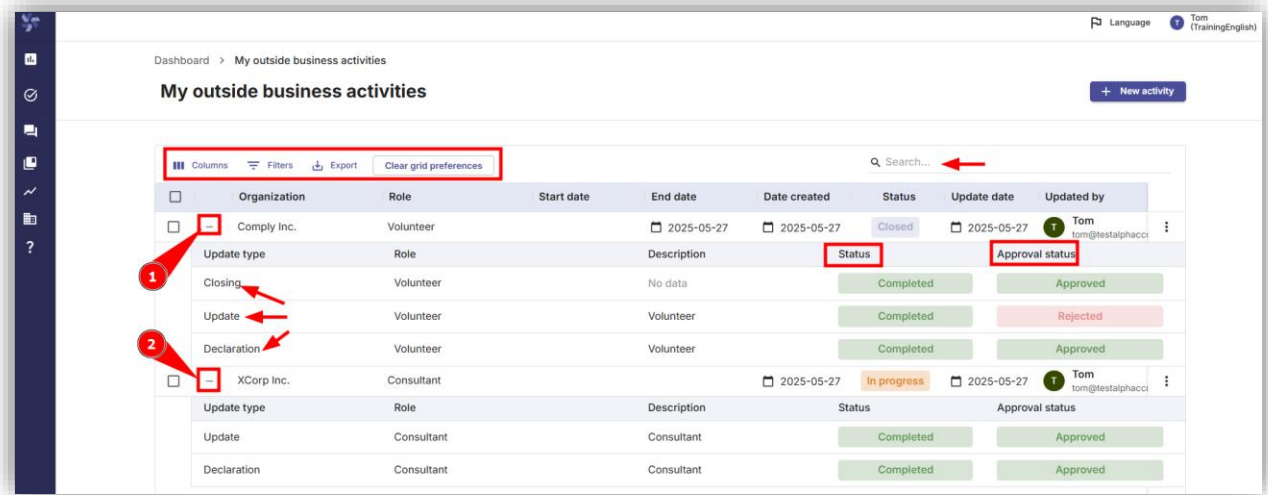


Figure 12: OBAs history page

NOTES

Please note that this document is a brief guide, and that short guides also exist for configuring control parameters. The AlphaCCO support team will be happy to help you if you require further assistance. Please do not hesitate to contact us at support@alphacco.com