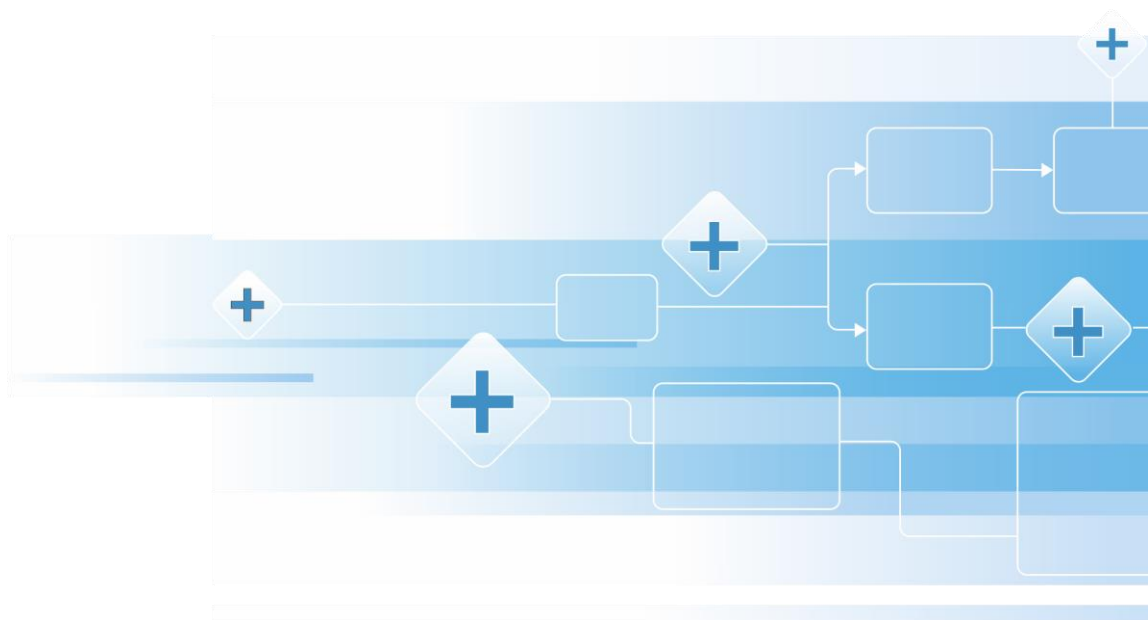




ELMA Store Component

Business Process: Equipment Request



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1 Intended Use

The process defines procedures for providing company's departments with computer equipment.

2 Process Participants

- **Initiator** – any system user;
- **Manager** – initiator's manager, according to the organizational structure;
- **IT Administrator** – user, who carries out the technical tasks in the process;
- **Budget Owner** – user, responsible for the budget of the organization;
- **Accountant** – user, responsible for paying invoices.

3 Business Process Includes

No	Object/Process	Name	Intended Use
1	Business process	Equipment request	The process determines actions from creating and approving a request to installing the equipment.

Compatibility with other ELMA applications and modules:

- Requires ELMA BPM application.

4 Process Maps

4.1 Map of the “Equipment Request” process

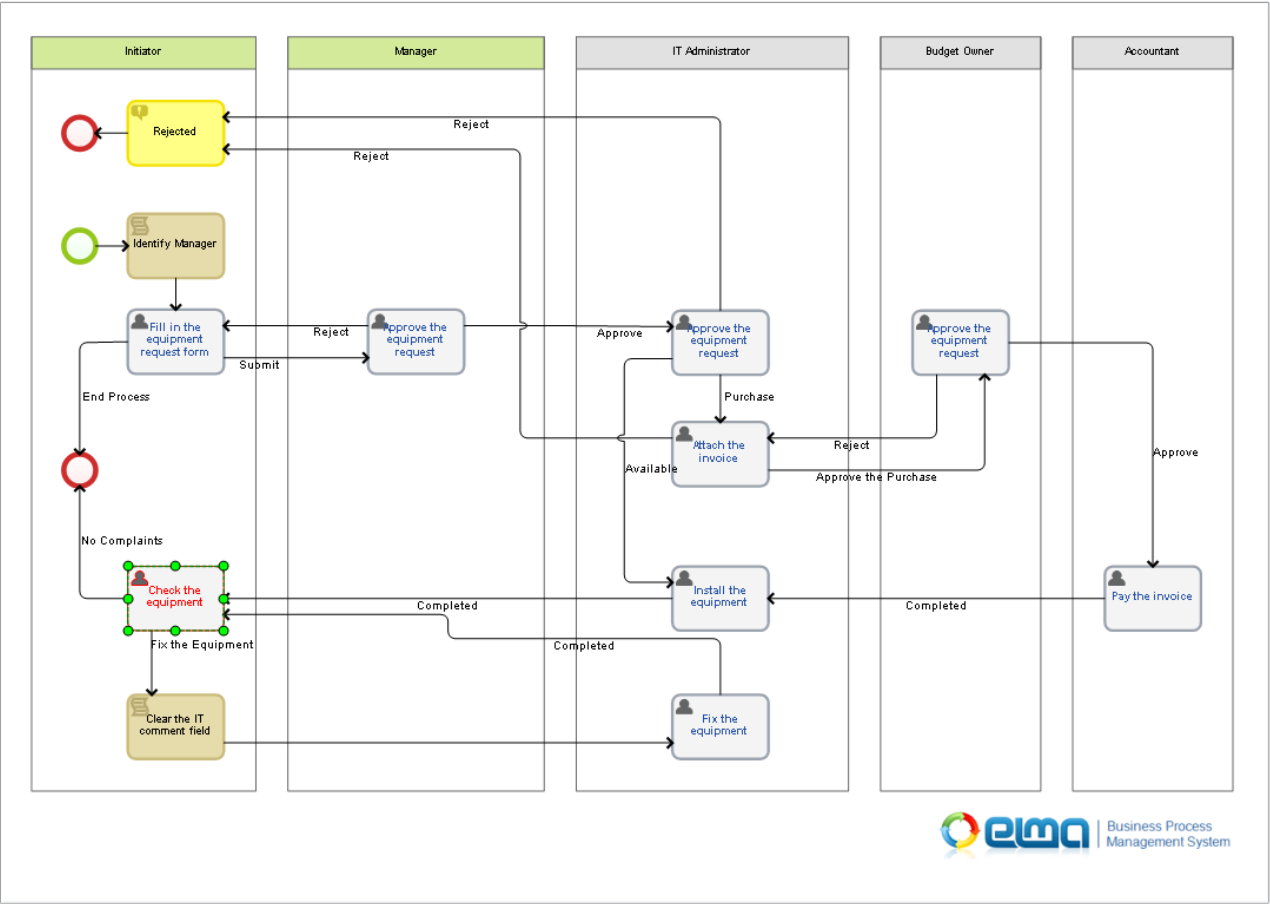


Fig. 1. Map of the “Equipment Request” process

5 Configuring Business Process

5.1 Configuring Business Process

The process includes three static swimlanes: IT Administrator, Budget Owner and Accountant. Open ELMA Designer and assign job positions for these swimlanes.

When configuring static swimlanes, it is NOT recommended to specify such elements of organizational structure as "group of employees" or "member of department", if a group or a department includes more than one user.

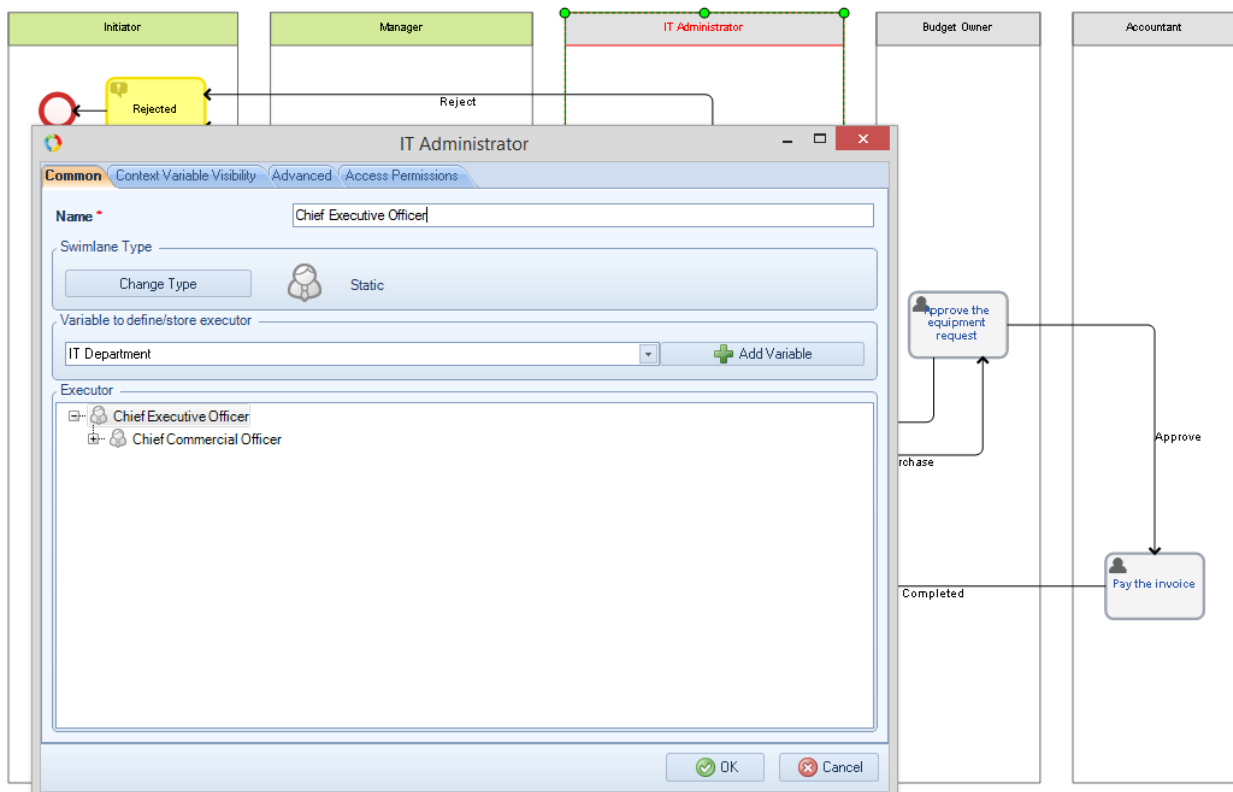


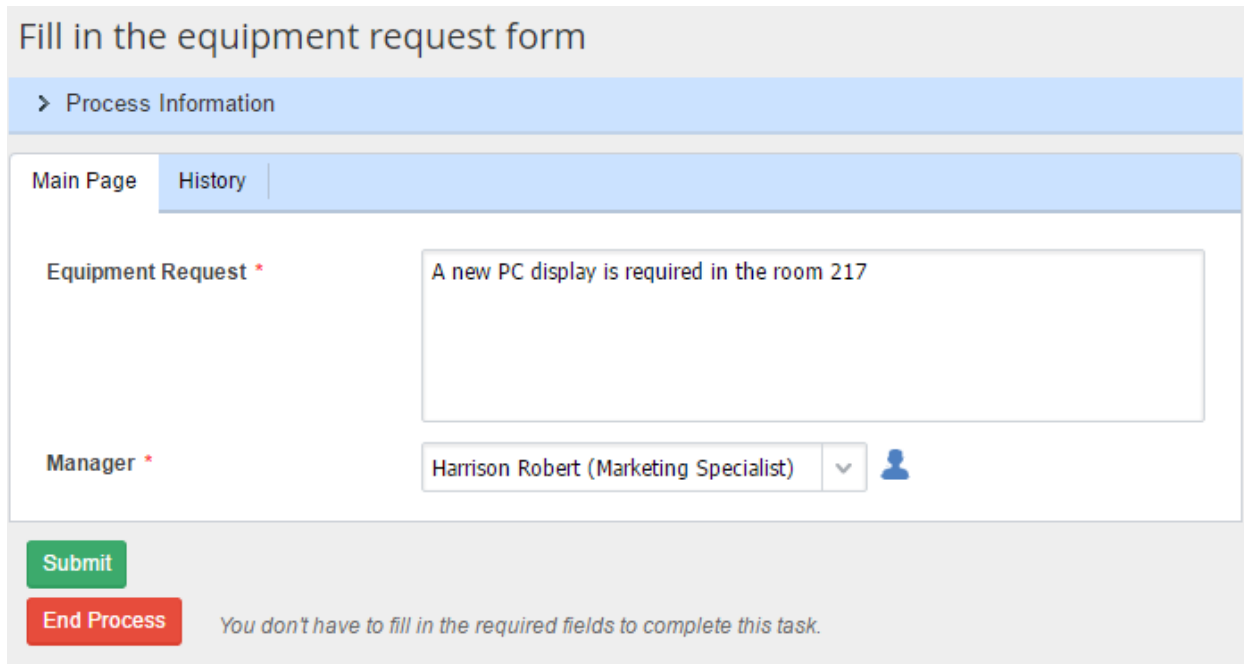
Fig. 2. Configuring the IT Administrator swimlane

6 Starting Business Process

To initiate the business process, click the Start Process button on the main page of the ELMA web interface and select the Equipment Request process.

7 Process Tasks

7.1 Fill in the equipment request form



The screenshot shows a web interface for the task "Fill in the equipment request form". At the top, there is a blue header bar with the title "> Process Information". Below this, there is a navigation bar with two tabs: "Main Page" and "History". The "Main Page" tab is active. The main content area contains two form fields. The first field is labeled "Equipment Request *" and contains the text "A new PC display is required in the room 217". The second field is labeled "Manager *" and contains the text "Harrison Robert (Marketing Specialist)" with a dropdown arrow and a user icon. At the bottom of the form, there are two buttons: a green "Submit" button and a red "End Process" button. Below the "End Process" button, there is a message: "You don't have to fill in the required fields to complete this task."

Fig. 3. "Fill in the equipment request form" task

Executor: Initiator.

Task: Fill in the equipment request:

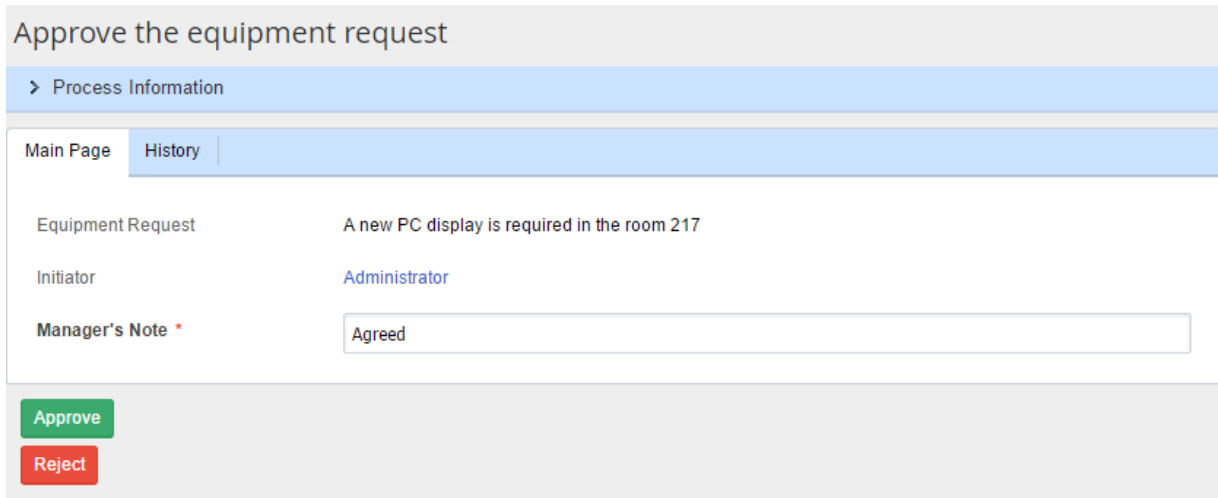
- **Equipment Request** – required field, filled in by the initiator.
- **Manager** – filled in automatically. If the manager is not identified, the initiator selects them.

Required field.

Transitions:

- **Submit** – the request is sent for approval to the manager.
- **End Process** – the process is completed.

7.2 Approve the equipment request (manager)



Approve the equipment request

> Process Information

Main Page | History

Equipment Request: A new PC display is required in the room 217

Initiator: Administrator

Manager's Note *: Agreed

Approve

Reject

Fig. 4. "Approve the equipment request" task

Executor: Initiator's manager.

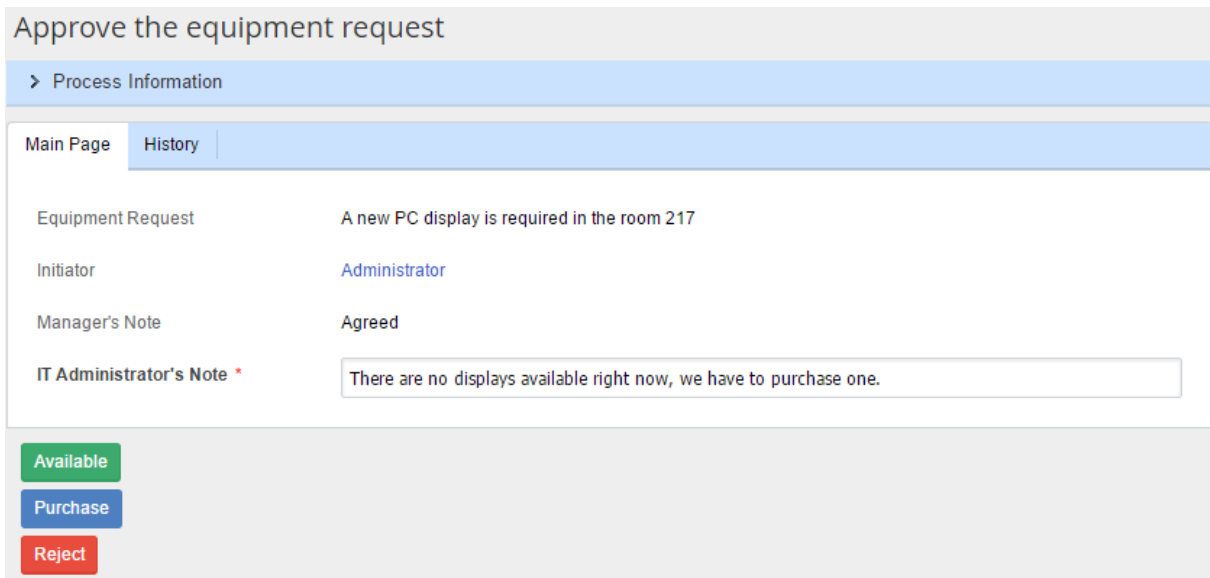
Task: Approve the equipment request:

- **Equipment request** – filled in automatically. Read only field.
- **Initiator** – filled in automatically. Read only field.
- **Manager's Note** – filled in by the executor.

Transitions:

- **Approve** – the request is sent to the IT Administrator for approval.
- **Reject** – the request is rejected and sent for revision to the process initiator.

7.3 Approve the equipment request (IT administrator)



Approve the equipment request

> Process Information

Main Page | History

Equipment Request: A new PC display is required in the room 217

Initiator: Administrator

Manager's Note: Agreed

IT Administrator's Note *: There are no displays available right now, we have to purchase one.

Available

Purchase

Reject

Fig. 5. "Approve the equipment request" task

Executor: IT Administrator.

Task: Approve the equipment request:

- **Equipment request** – filled in automatically. Read only field.
- **Initiator** – filled in automatically. Read only field.
- **Manager's Note** – filled in automatically. Read only field.
- **IT Administrator's Note** – filled in by the executor.

Transitions:

- **Reject** – the request is rejected, the initiator receives a notification about it, the process is completed.
- **Available** – the request is approved, the initiator is assigned with a task to receive the equipment.
- **Purchase** – the request is approved and sent for approval to the budget owner.

7.4 Attach the invoice

Attach the invoice

> Process Information

Please choose the equipment, supplier and attach the invoice.

Main PageHistory

Equipment Request

A new PC display is required in the room 217

Initiator

Administrator

Manager's Note

Agreed

Invoice *

Invoice.docx

Q+

IT Administrator's Note *

There are no displays available right now, we have to purchase one.

Approve the Purchase

Reject

You don't have to fill in the required fields to complete this task.

Fig. 6. “Attach the invoice” task

Executor: IT administrator.

Task: Attach the invoice.

Transitions:




- **Approve the Purchase** – the invoice is sent for approval.
- **Reject** – the request is rejected, notify the executor.

7.5 Approve the equipment request (budget owner)

Approve the equipment request

> Process Information

Main Page History

Equipment Request	A new PC display is required in the room 217
Initiator	Administrator
IT Administrator's Note	There are no displays available right now, we have to purchase one.
Invoice	   Invoice.docx
Budget Owner's Note *	<input type="text" value="Approved"/>

Approve

Reject

Fig. 7. "Approve the equipment request" task

Executor: Budget owner.

Task: Approve purchasing of equipment:

- **Equipment request** – filled in automatically. Read only field.
- **Initiator** – filled in automatically. Read only field.
- **IT Administrator's Note** – filled in automatically. Read only field.
- **Budget Owner's Note** – filled in by the executor. Required field.

Transitions:

- **Approve** – the invoice will be paid.
- **Reject** – the invoice will not be paid, notify the initiator.

7.6 Pay the invoice


Pay the invoice

> Process Information

Main Page

History

Invoice

 Invoice.docx

Equipment Request

A new PC display is required in the room 217

Manager's Note

Agreed

IT Administrator's Note

There are no displays available right now, we have to purchase one.

Budget Owner's Note

Approved

Accountant's Note *

Completed

Fig. 8. “Pay the invoice” task

Executor: Accountant.

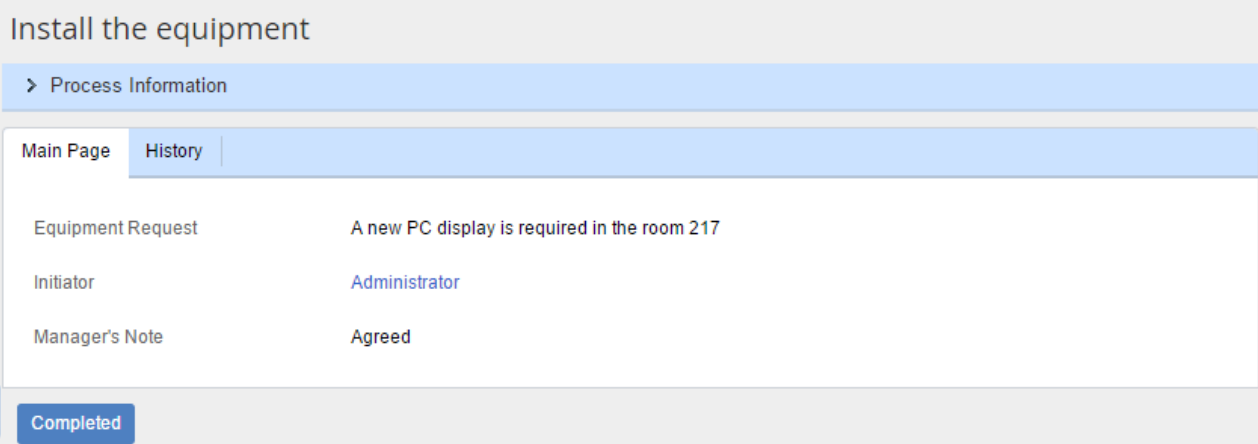
Task: Pay the invoice:

- **Invoice** – File-type document. Read only field.
- **Equipment Request** – filled in automatically. Read only field.
- **Manager’s Note** – filled in automatically. Read only field.
- **IT Administrator’s Note** – filled in automatically. Read only field.
- **Accountant’s Note** – filled in by the executor. Required field.

Transitions:

- **Completed** – the invoice is paid.

7.7 Install the equipment



Install the equipment

> Process Information

Main Page | History

Equipment Request	A new PC display is required in the room 217
Initiator	Administrator
Manager's Note	Agreed

Completed

Fig. 9. "Install the equipment" task

Executor: IT administrator.

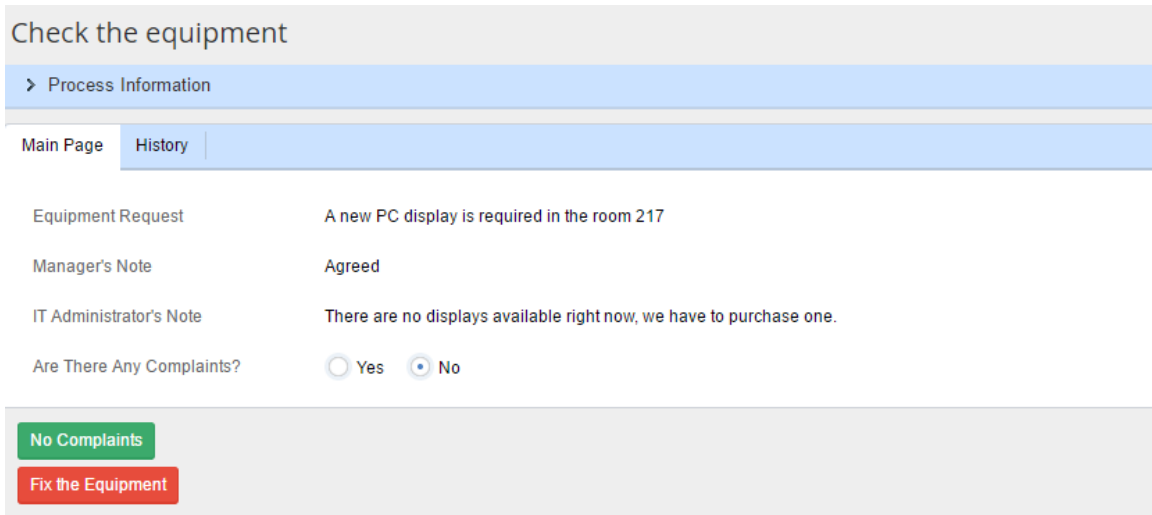
Task: Install the equipment. All the fields are read only:

- **Equipment Request;**
- **Initiator;**
- **Manager's Comment.**

Transitions:

- **Completed** – the initiator receives a task to check the equipment.

7.8 Check the equipment



Check the equipment

> Process Information

Main Page | History

Equipment Request	A new PC display is required in the room 217
Manager's Note	Agreed
IT Administrator's Note	There are no displays available right now, we have to purchase one.
Are There Any Complaints?	<input type="radio"/> Yes <input checked="" type="radio"/> No

No Complaints

Fix the Equipment

Fig. 10. “Check the equipment” task

Executor: Initiator.

Task: Check the equipment. All the fields are read only:

- **Equipment Request;**
- **Manager's Comment.**

Transitions:

- **No Complaints** – equipment is checked, the process is completed.
- **Fix the Equipment** – a task to fix the equipment is assigned.

7.9 Fix the equipment

Fix the equipment

> Process Information

Main Page

History

Equipment Request

A new PC display is required in the room 217

Initiator's Note

There seem to be some issues with HDMI connection

IT Administrator's Note *

Fixed

Completed

Fig. 11. "Fix the equipment" task

- Executor:** IT administrator
Task: Fix/reinstall the equipment
Transitions:
- **Completed** – a task to check the equipment is assigned.