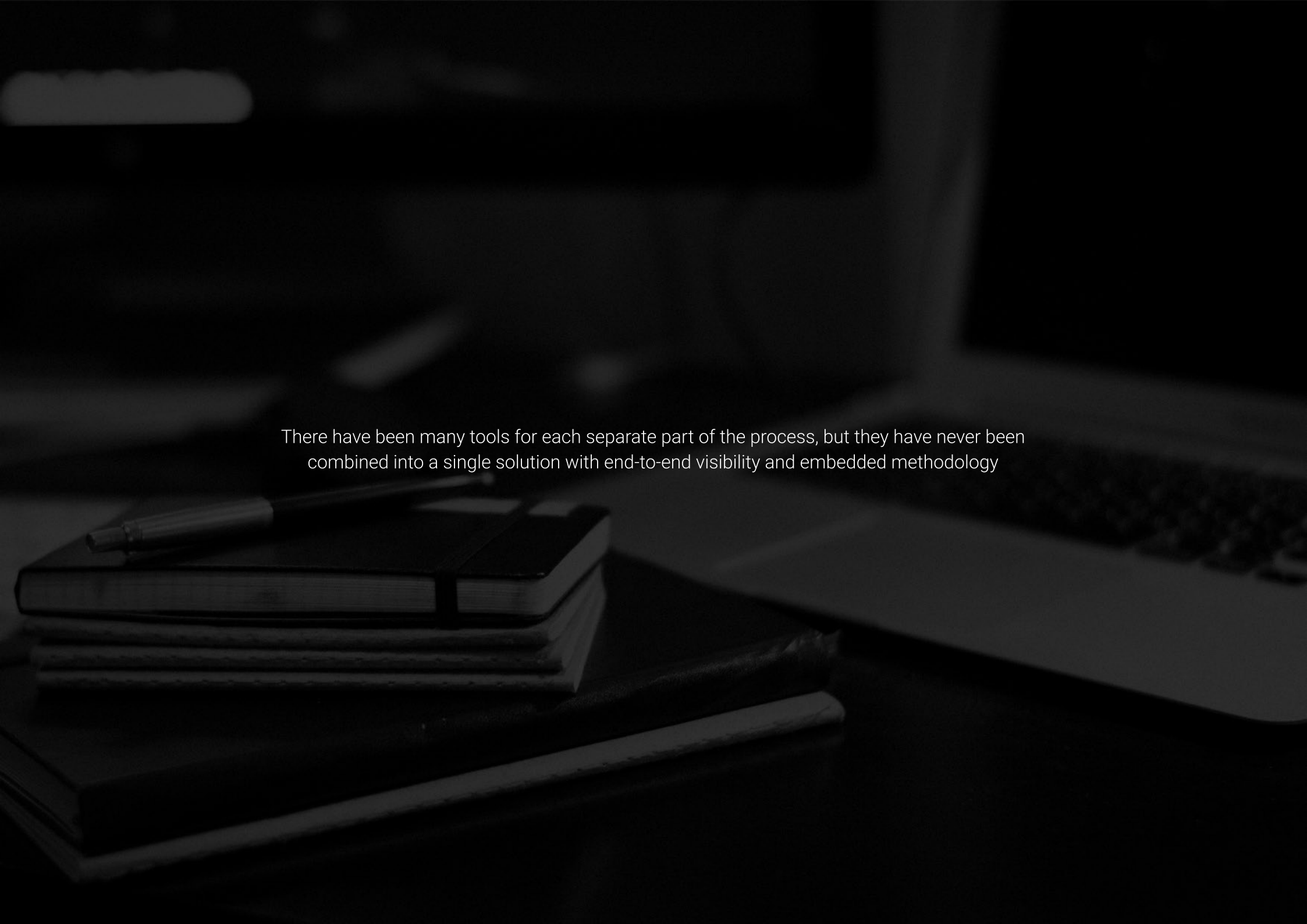


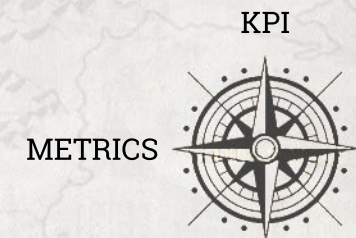


Conclusion  
Managed collaboration

A dark, moody photograph of a desk. In the foreground, there is a stack of several notebooks or books, with a pen resting on top of them. To the right, a laptop is partially visible, showing its keyboard. The background is blurred, suggesting a workspace. The overall lighting is low, creating a professional and focused atmosphere.

There have been many tools for each separate part of the process, but they have never been combined into a single solution with end-to-end visibility and embedded methodology

# Products, projects, resources



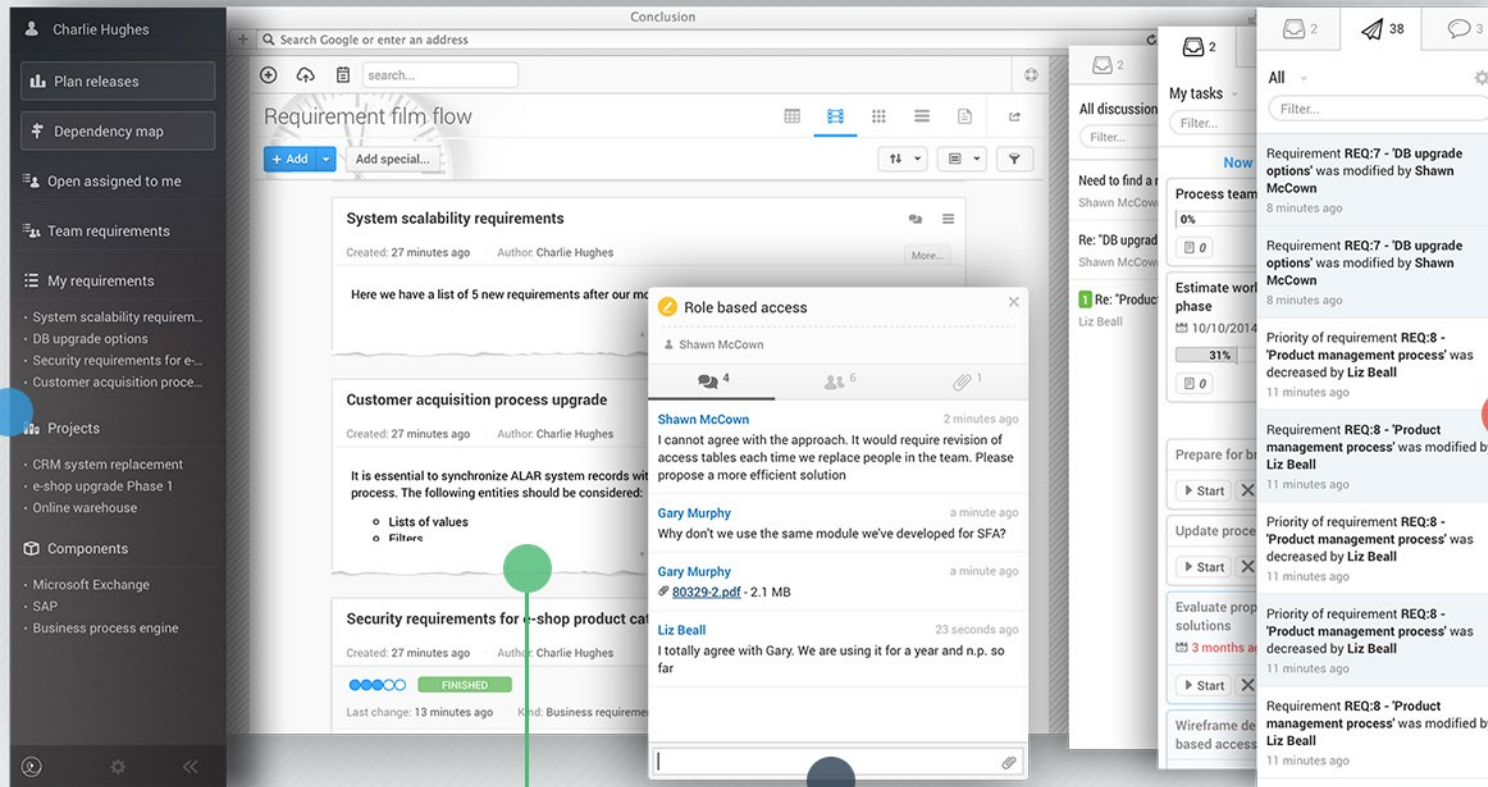
# Unified working environment

## Role-based main menu

Open your recent documents, browse repository, access most frequently used functions in one click

## Activity panels

Manage active tasks, instantly reply to peers in conversations, stay informed about all news in the team



## Rich, editable content areas

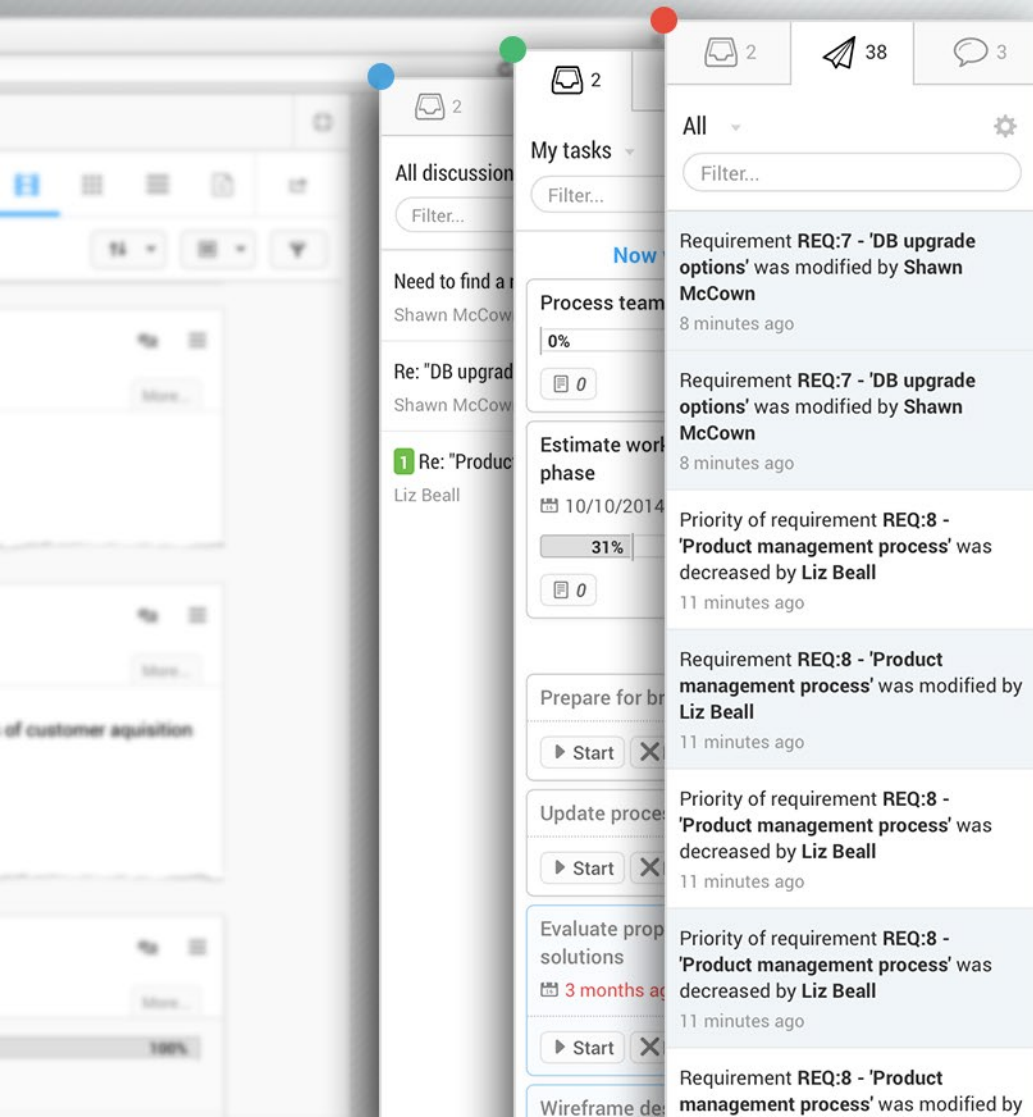
Collaborate on a single document or a set of records at once. Full featured rich text editor, diagram editor, multiple view options and infinite scrolling

## Discuss in place

Have instant conversations linked to individual text blocks. Attach files, invite participants, control privacy and receive copies by e-mail with "reply-to" capability

# Instant access panels

There is no need to switch into another application to assign a task or send a message



## Discussions

Manage open discussions as a “to-do” list. Once the conversation is over, discussions disappear from this panel. Discussions are much better than e-mails, they keep everyone in the loop and respect the workflow rules



## Tasks

Task list is essential to know what we have to do now and later on. This is why we put it to the first place. Related documents may be opened by one click directly from the task



## Notifications

Instead of keeping asking your colleague if his job is done, notifications provide a better way of knowing what happens around the project

Requirements summary

+ Add Add special...

Filter...

All / New / Not finished / Finished / Cancelled

Name	ID	Priority	Created	Owner	Effort	Responsible	Status
<input type="checkbox"/> Background process execution engine	12	● SHOULD	13.10.2014	Charlie Hughes	5 MD	Diana Harbort	NEW
<input type="checkbox"/> Workflow editor	11	● MUST	13.10.2014	Charlie Hughes	210 MD	Gary Murphy	IN PROGRESS
<input type="checkbox"/> Conditional fields masking rules	10	● COULD	13.10.2014	Charlie Hughes	3 MD	Charlie Hughes	PREPARATION
<input type="checkbox"/> Implement chart account access criteria	9	● MUST	13.10.2014	Charlie Hughes	14 MD	Charlie Hughes	PLANNED
<input type="checkbox"/> System scalability requirements	3	● SHOULD	3.10.2014	Charlie Hughes	REQUEST	Charlie Hughes	PREPARATION

# A single repository

All documents with history in one place, shared and live



Navigate and find relevant records using full text search, powerful table filters, hyperlinks and tags



Customers, subcontractors or external workers may see only a part of the repository. They may still participate in the workflow, shortening time to market, but sensitive data will not leave the company.



Configurable views and role-based reports

# Collaborative editing

Use power of text processing to express requirements



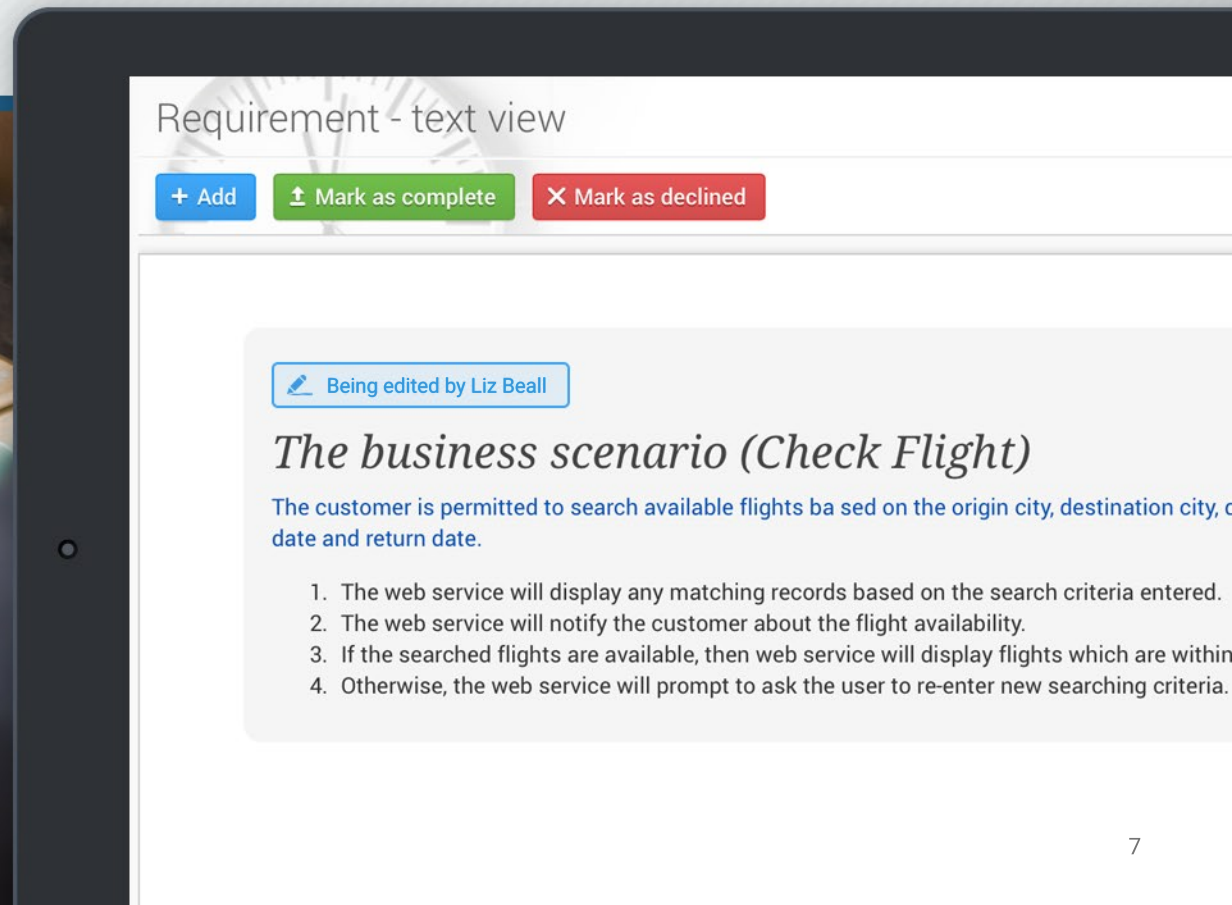
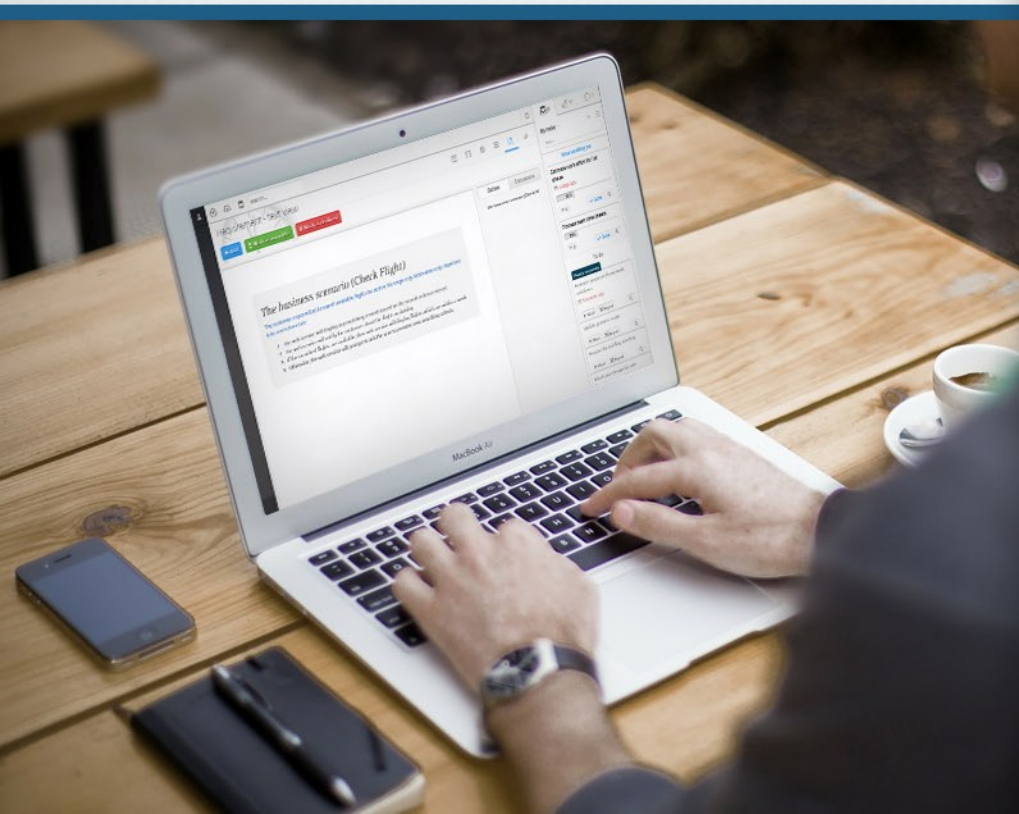
Avoid annoying import/export of document files and complex merge process



Multiple locking mechanisms prevent users from merge conflicts



Rich text editor with embedded discussions



# Connect conversations with workflow

Another important step in “keep everything connected” strategy

## Context

Discussions may be linked to some part of a requirement or to a task. All linked chats are easily accessible from the record. Keeping history of conversations allows new team members to catch up quickly.

## Workflow

Discussions contain action buttons, making it simple to pick the right answer to the question, choose from several solution options, or just close a conversation, if it is no longer needed. Actions are linked with Lifecycle workflow rules and approval process.

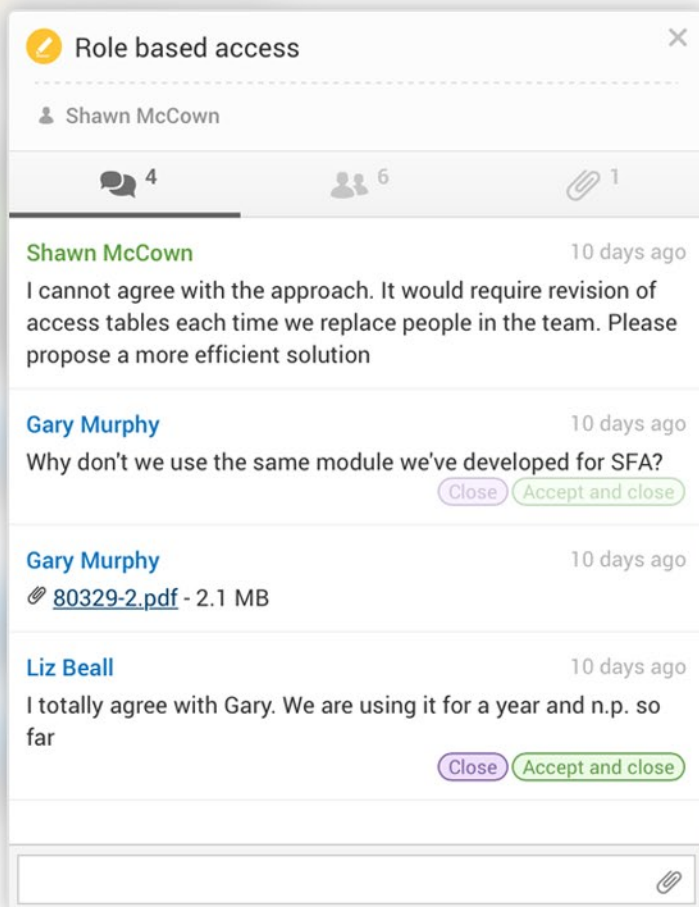
## Attachments

Upload and attach files in conversations to keep them together. Enrich answers with illustrations, demos or spreadsheets.

## E-mail support

Conversations may be forwarded to e-mail with a possibility to reply with a text or with a command.

It is easy to approve requests from a smartphone or make other decisions using only an e-mail client.





# Manage the team

Task execution control automatically interacts with planning

## Task management panels

Projects, milestones, requirements, components and tasks are mutually interconnected, providing full depth of visibility. UI eliminates need to fill same information several times. Task execution lifecycle is naturally overlapping with requirements and project lifecycles.

The screenshot displays a 'Task tracking' dashboard. On the left, there are navigation menus for 'My own tasks', 'Reports' (listing Diana Harbort, James Lienemann, Liz Beall, Gary Murphy, and Shawn McCown), and 'Projects' (listing e-shop upgrade Phase 1, CRM system replacement, and Online warehouse). The main area shows a list of tasks for three team members: Diana Harbort, Gary Murphy, and James Lienemann. Each task includes a title, a progress bar, a status label (e.g., ASSIGNED, IN PROGRESS, NEW, SUSPENDED), and a 'Done' button. The right sidebar, titled 'My tasks', shows a 'Now working on' section with three task cards: 'Estimate work effort for 1st phase' (31% complete), 'Prepare HW requirements document' (0% complete), and 'Process team time sheets' (23% complete). Each card also has a 'Done' button and a search icon.

# Capacity planning

Integrated tools for capacity planning and resource leveling

## Scenarios

Play with multiple staffing variants and select the best one. Interactively calculate roadmaps for various “what-if” scenarios and discuss them in the team.

## Agile and waterfall

Plan releases, cycles, iterations according to methodology selected for a particular project.

## Real-time calculations

Make system calculate best approach automatically, or manually adjust each item to find best roadmap. See changes instantly and be able to estimate finance as well.

The screenshot displays a software interface for capacity planning. At the top, there's a 'Milestone planning pivot' section with buttons for '+ Add milestones', 'Auto calc', 'Apply', and 'Reset'. Below this, there are two main panels: 'Unplanned' and 'Pilot'. The 'Unplanned' panel shows requirements (7), capacity (2272 MH), and cost (215,840.00 \$). The 'Pilot' panel shows a specific scenario with capacity (256 MH) and cost (24320 \$). To the right, there's a 'Phase 1' panel with capacity (80 MH) and cost (7600 \$). A summary bar indicates 'Requirements: 7 2272 MH' and 'Cost \$ 39,520.00'. Below these panels is a table with columns for Requirement, Created, Requestor, Effort, and Cost. The table lists several requirements like 'External API', 'Kerberos auth', 'SSO Framework', 'SOAP API', and 'Background process execution engine', each with associated dates, requestors, and costs. A 'Release' dropdown menu is open, showing 'Not assigned' for several items. A circular callout highlights the 'Pilot' panel, another highlights the 'Release' dropdown, and a third highlights the 'Cost' column of the table.

Requirement	Created	Requestor	Effort	Cost
External API	13.10.2014	Charlie Hughes	52	\$ 7,600.00
Kerberos auth	13.10.2014	Charlie Hughes	10	\$ 24,320.00
SSO Framework	13.10.2014	Charlie Hughes	32	\$ 7,600.00
SOAP API	13.10.2014	Charlie Hughes	10	\$ 3,800.00
Background process execution engine	13.10.2014	Charlie Hughes	5	\$ 3,000.00

# Keep customers informed

Plan, replan, approve, notify

ID	Prio	Requirement	Responsible	Effort
<b>Phase 1</b>				
18	●	SOAP API	Charlie Hughes	10 MD
<b>Pilot</b>				
20	●	Kerberos auth	Charlie Hughes	10 MD
9	●	Implement chart account access criteria	Charlie Hughes	14 MD
12	●	Background process execution engine	Diana Harbort	5 MD
10	●	Conditional fields masking rules	Charlie Hughes	3 MD
<b>Items not assigned to any release</b>				
19	●	SSO Framework	Charlie Hughes	32 MD
17	●	External API	Charlie Hughes	52 MD
11	●	Workflow editor	Gary Murphy	210 MD

## Improve trust by predicting delays and announcing on time

- Plan execution roadmaps and have visual map of work ahead. Be prepared for risks, track progress.
- Inform customers, users and suppliers automatically on any change
- Allow driven negotiations and collaboration to find the best approach to incorporate changes into running activities

# Business roles

Each role in the process has special expectations. Conclusion meets all of them

## CIO

Now we have a bridge between business and IT that is easy to implement even in a complex changing organization



## Business user

We can submit our ideas to IT without knowing how IT works and what their internal processes are



## Program manager

Focusing on business priorities instead of documents, tables and e-mails handling



# IT team roles

Conclusion may be interconnected with existing IT tools

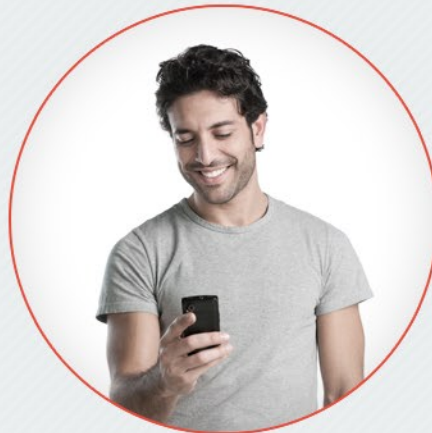
## Business analyst

Finally there is a tool for business analysts, incorporating document workflow and knowledge management



## Software developer

Requirement history and relations can be easily tracked. Now I have better understanding what is requested



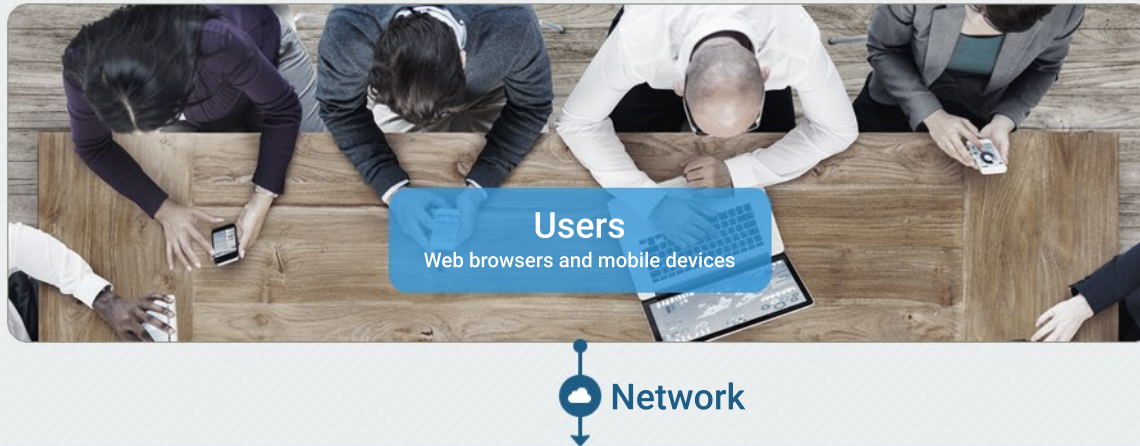
## Software tester

I can work with my favorite tool of choice, being sure information is properly synchronized with all other teams



# Conclusion system architecture

Task execution control automatically interacts with planning



## Development tools

### GUI Editor

Integrated template and screen editor

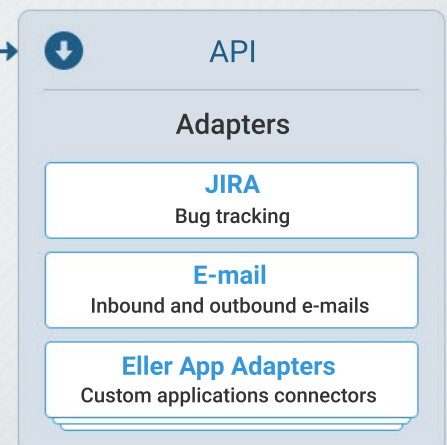
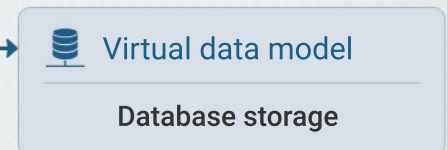
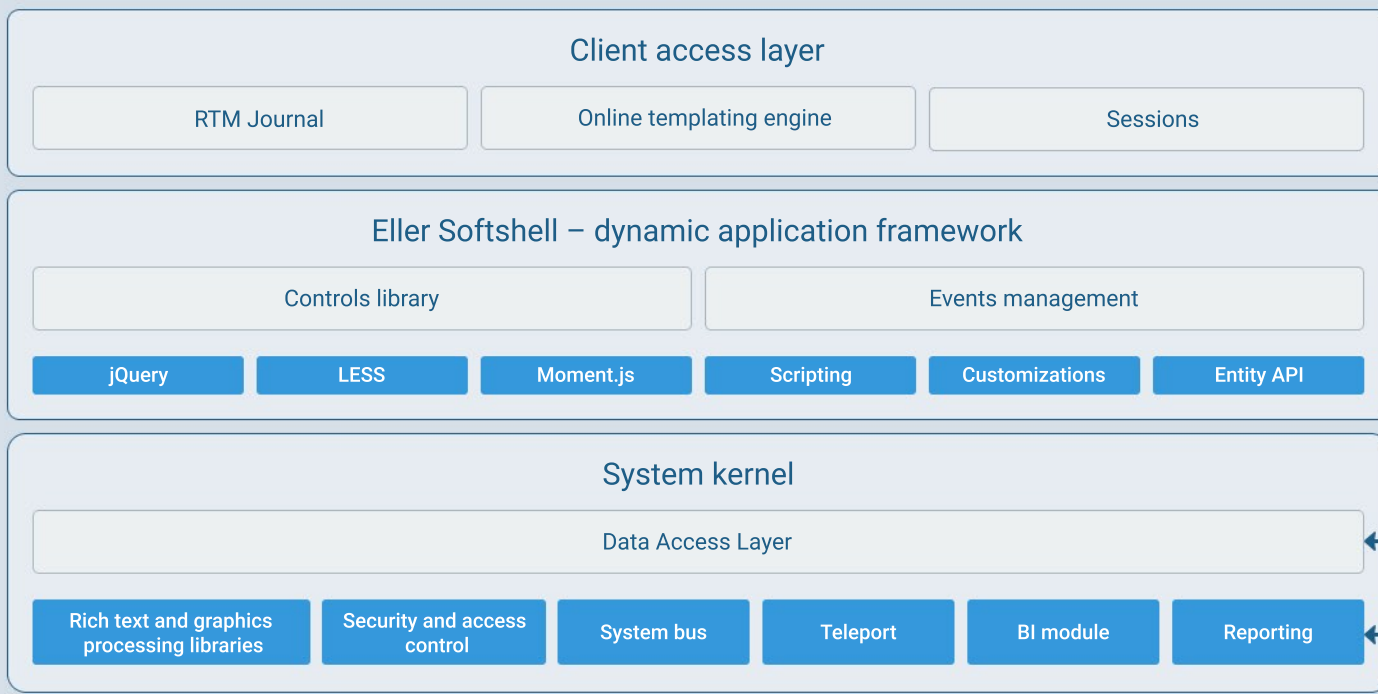
### Metamodel Editor

Online database model editor

### Workflow editor

Process templates editor

Tomcat 7 / Jetty - Java servlet container, JVM 7



# Product Features

## Requirements collection

Requirements, defects and ideas direct entry with embedded text editor, including all common rich text formatting capabilities

Custom forms definition, form-based data collection

Embedded diagram drawing tool

Requirements structuring, customizable categories, lists and attributes

Private comments may be saved together with requirements

Private notes may be published to team and converted to requirements

External API for requirements collection

## Requirements processing

View/group/sort/prioritize requirements or requests pipeline

Cascaded prioritization model

Shared view and edit of records, real-time data updates

Requirements relations - customizable types and properties of relations

Requirements templates according to project type or system area

User-defined requirement templates

Cost estimate calculations according to user-specified formulas

Lifecycle management

Unlimited number of custom fields

Toolbox for online pipeline prioritization

Execution control

Requirements may be linked to projects, milestones, releases, architectural elements or other records

Dependency analysis tools

Effort estimation tools

Discuss a requirement or any piece of text of a requirement

Requirement changes history, baselines and visual text difference viewer

## User interface

Pure HTML5 based WEB browser interface without any client-side add-ons or Java applets

Rapid click response time

Predictive data preload and caching

User screens and menus may be personified according to user role or group

System resources sharing for multiple "spaces"- multi-tenancy support

Color tagging

Files upload from a browser

Network failure recovery

Multilanguage interface

## Documents import

Files may be attached to any records – requirements, projects etc...

Copy-paste of text and images from other applications or web pages, including security filtering of potentially dangerous content

Microsoft Word documents import with automatic recognition of record blocks, markup, hierarchical structure. Import of pictures, diagrams or embedded files

Plain text files import

## Security and access

WEB browser based access with HTTP support

SSO, LDAP, other security interfaces connectors

Role-based user security model

Private fields visible only to the owner of the field

Form protection against cross-site-scripting attacks

Embedded user database with password or certificate-based authorization

Table level and field level access permissions

## Task management

Manual or automated task assignment

User-defined task templates

Deadline reminders, notifications, e-mail alerts

Estimated and spent time

Discussions linked to tasks

Tasks are linked to requirements and projects

Automated progress calculation and propagation

Tasklist panel permanently visible on the screen

Skill-based or resource based task assignment

Escalation, delegation, real-time notifications

Assigned tasks analysis

## Project management

Projects repository

Project scope view/edit, link requirements to projects

Project based collaborative workspace

Multiple methodologies support

Project reports, online graphs

Cross-project resource planning

Project health analysis

Notifications to project participants

Project lifecycle

## Release and project planning

Project structure editor: define releases, plan milestones, set up phases

Automated resource planning with respect to priorities, resources and prerequisites

Release scope planning, approval and notifications

# Product Features

## Collaboration

Online instant chat linked to records with attachment and security support

Approval processes linked to versions, baselines, discussions

E-mail chat connector with remote commands support

Active discussions panel permanently visible on the user screen

## External systems integration

Integrated Eller "Teleport" module for real-time data exchange with external systems

Set of adapters for commonly used enterprise systems

Configurable replication of entities and fields

Parent-child structure and relations replication

## Analytics

Calculation of KPIs

Time-domain or organization structure domain KPIs

Multiple time-zone support

Real-time analytics

## Reporting

Predefined role-based reports

Internal BI module with real-time graphs

Reports scheduler

Export reports to MS Word, PDF, HTML

## Process automation

Configurable process templates, containing tasks and other content

Scripting support for complex operations automation

Verification reports

## Configuration and settings

Run-time editable database model

Lists of values editor, with colors and icons support

Roles based user menus

Custom controls support

Custom applications may be created and deployed

Task, requirement templates

E-mail templates

Adjustable algorithms for effort and cost calculations

First page personification

Development environment for scripts debugging

GUI element development environment

## Other

Fulltext search

Context tooltips guiding users through the process

REST API for external systems



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