

# Working with Data and Documents

## Part 1 - Categories

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*Explains the purpose of the categories in Smart Flow, how to create or remove categories, and how to assign groups, or add data, documents or related contacts to each category.*

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## Introduction to the Categories

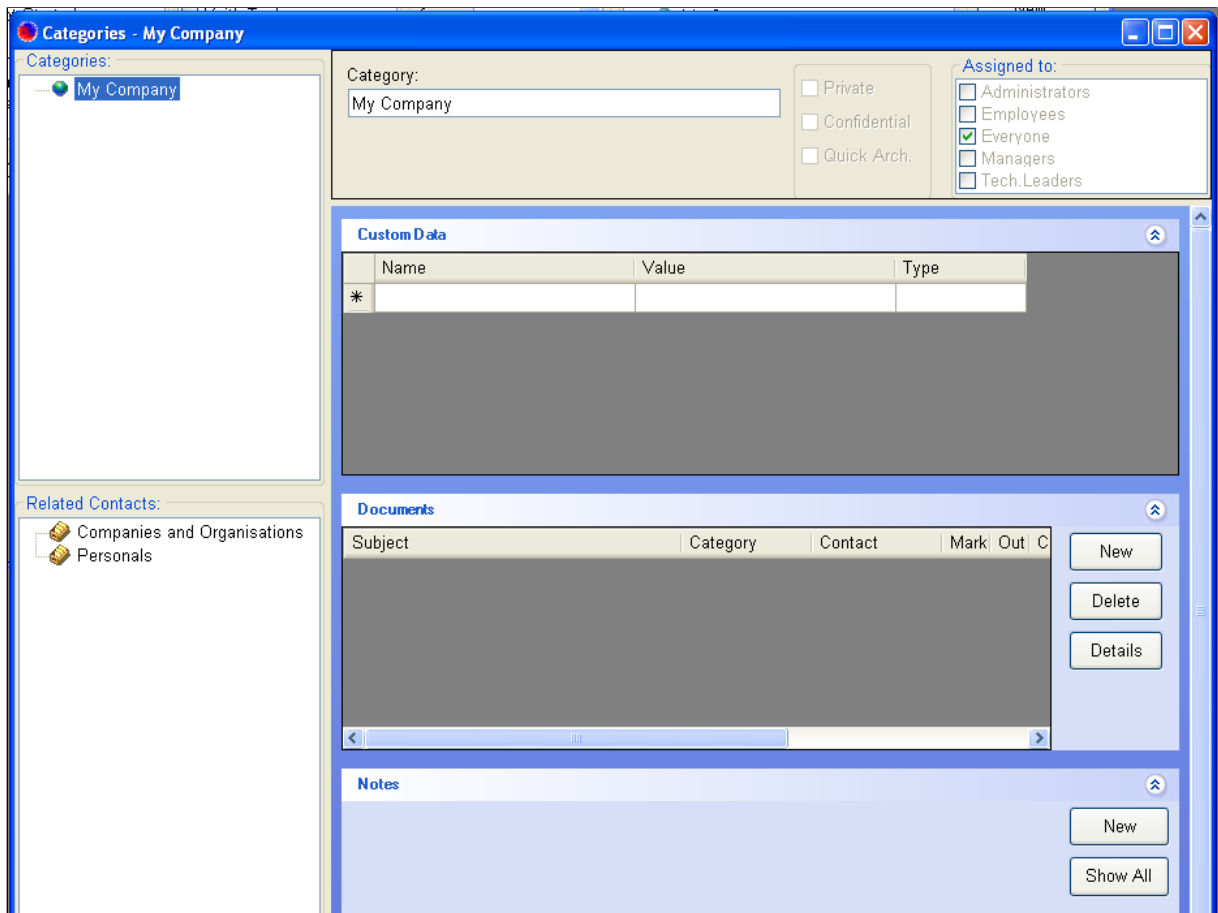
Categories are folders, into which similar work processes can be grouped. For instance work processes related to a specific activity (Rentals, Projects, Cases, Consultancy, etc.), or to specific clients, could be grouped into such categories.

The categories could be used to provide the default data sets to the sub-categories or processes created in them. This is convenient when the processes within the category should have the same or similar data sets (names and types of data). For instance a category named 'Contracts', which contains company contracts as work processes, could contain data fields such as 'Contract No', 'Date' or 'Valid From'. These fields will be copied later to the processes created into this category.

The categories could also contain own data and/or documents. These would be usually data or documents, which do not change at all or change rarely in time, and which should be easily available within the organization. For instance these could be some manuals or specifications for internal use.

## The Categories Screen

To view the details of the available categories, or to create new categories as needed, select the menu *Manage / Categories* on the *Smart Flow* main screen, or press the button 'Categories' on the toolbar.



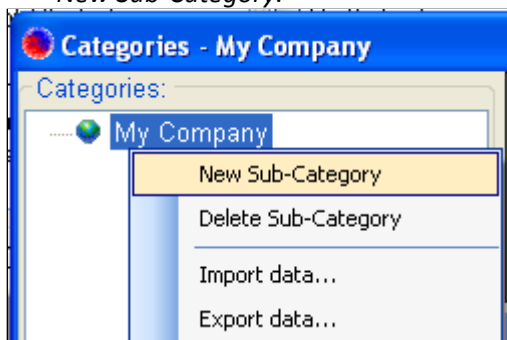
On the upper left part of the screen you can see the tree of available categories. On the upper right part of the screen are shown the details of the currently selected category - its name and the list of groups, to which the selected category is available. Only users belonging to the selected groups can see this category, and only contacts assigned to these groups could be assigned later as workers for processes created within this category.

Below the category details panel are shown the lists of custom data, documents and notes related to the currently selected category. At the lower left part of the screen are displayed the contacts (if any) related to the currently selected category.

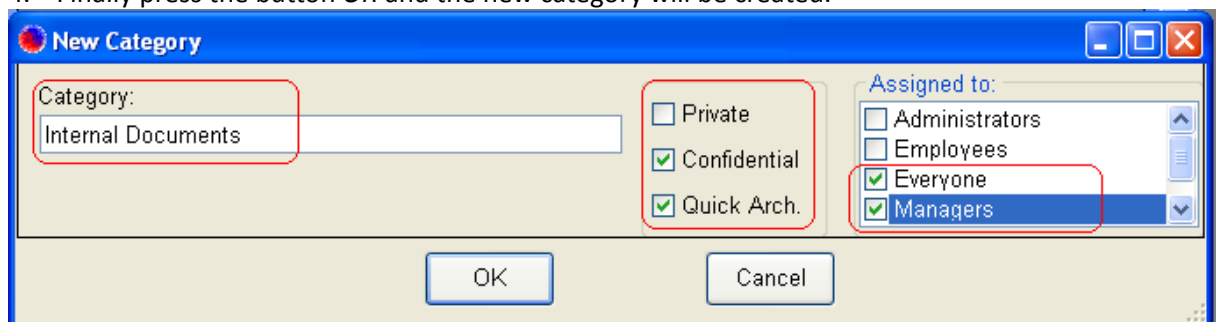
## Category Creation

At the beginning there is only one category available – *My Company*. To create additional categories follow the steps below:

1. Right click on the category where you'd like to add the new sub-category and select the menu *New Sub-Category*.



2. The dialog *New Category* will show up. Enter the name of the new category, and select the groups to which this category will be available. Only users belonging to the selected groups will be able to see this category, and only contacts assigned to these groups could be assigned later as workers for processes created within this category.
3. The check boxes *Private* and *Confidential* control the user access to the category. Private categories are visible only to the user that has created them. Confidential categories are visible to the users (from the selected groups) that have permissions to see confidential categories.
4. Finally press the button *OK* and the new category will be created.



## Category Removal

To delete a category right click on it in the tree of categories and select *Delete Sub-Category* from the context menu. Confirm that you are sure about this removal, and then the category will be deleted. If the category contains sub-categories and/or work processes, these sub-categories and/or work processes will be deleted too, along with the data, documents and other relations they contain. Deleted objects could be restored later if needed by the *Smart Flow* administrator.

## Working with Data

Each category could provide the default data set to the sub-categories or processes created in it. This is convenient when the processes within the category should contain the same or similar data sets (names and types of data). For instance, a category named 'Contracts' containing company contracts as work processes, could contain data fields such as 'Contract No', 'Date' or 'Valid From'. These fields will be copied later to the processes created into this category.

### Adding Data to the Data Set

Locate the *Custom Data* panel on the right part of the screen. Enter the name of the data field you're adding into the column *Name*. Enter the data value (if any) into the column *Value*.

Custom Data			
	Name	Value	Type
	Contract Number		<a href="#">Text</a>
*			

Pay attention to the column *Type*. As you can see the default data type is *Text*. If you like to change the data type (to Number, Date, Time, Percent, etc.), click on the data type link in the column *Type*. The dialog *Edit Data* will show up.

Use the combo box *Data Type* to select a different data type – *Number, Date, Percent, Yes/No*, etc. In this dialog you can also change the other data details, such as the name, value or formatting of the data field.

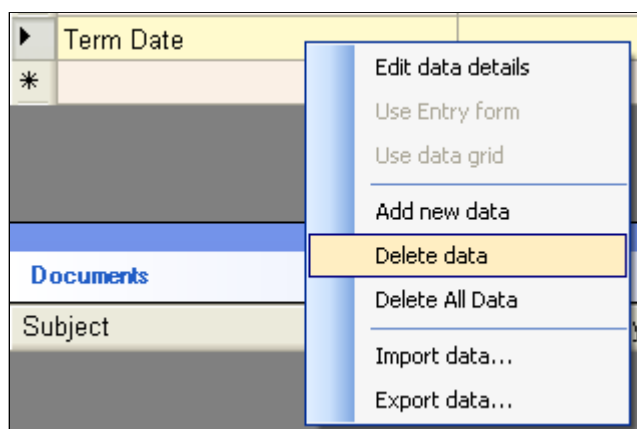
The check boxes *Private* and *Confidential* control the user access to the data field. The private data is available only to the user that has created it. The confidential data is available to the users that have permissions to see confidential information.

The check box *Replicate* controls whether the data field will be copied to the sub-categories and work processes, which will be created later within the current category.

### Removing Data from the Data Set

To delete a single data field, right click on it and select *Delete Data* from the context menu. Confirm that you are sure about the removal, and then the data field will be deleted.

To delete all data in the data set, right click on the *Custom Data* panel and select *Delete All Data* from the context menu. Confirm that you are sure about the removal, and then the whole data set will be deleted.



## Document Types

The main purpose of *Smart Flow* is to organize better the data and documents you work with, depending on the way of work. As a result you will have your everyday work neatly organized and the needed information – easily available.

*Smart Flow* works with different types of documents, commonly used in most offices:

- *Electronic documents* – these are all types of electronic files your organization works with. You can import or drag-drop existing files, or create new documents from scratch.
- *Scanned documents* – these are paper documents that you scan and transform into electronic documents.
- *Paper documents* – these are all documents on paper you haven't currently scanned and transformed into electronic documents. *Smart Flow* treats those documents as empty scanned documents.

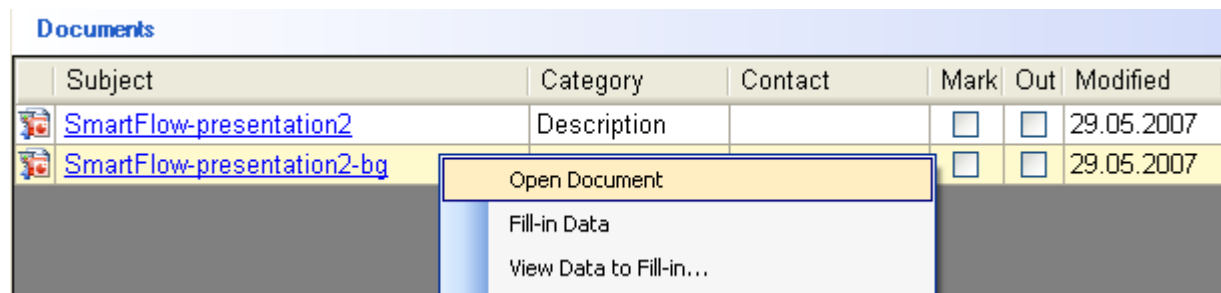
- *Hyperlinks* – these are links to external files, or to Internet-pages.

## Categories and Documents

For each category you can add documents of all types listed above. These would be usually documents, which do not change at all or change rarely in time, and which should be easily available within the organization. For instance these could be some manuals or specifications for internal use.

The *Documents* panel is placed below the *Custom Data* panel. To open a document from the list, click on the document's subject, or right click on a document and select *Open Document* from the context menu.

To replace the existing data fields in a document with the actual data values from the panel *Custom Data* right click on the document and select *Fill-in Data* from the context menu. More information about the automatic filling-in of data into documents can be found in the manual '*Working with Data and Documents - Part 3*'.



## Adding a Document

The easiest way to add an existing document (file) or a link to an existing document to the selected category is to drag it and drop it into the *Documents* panel, or to use the Copy/Paste functionality.

For a more detailed way to create, scan or import a document into the currently selected category, press the button *New* on the right of the *Documents* panel. The dialog *New Document* will show up.

The field *Subject* could be used to provide meaningful name for the document. This field will be disabled if a specific option, that creates the subject automatically, has been selected (for instance the option 'get file name as subject'). The field *Category* provides information about the category of the document. You can change it as needed.

The purpose of the check box *Outgoing* is to provide information whether the document is outgoing or incoming. The purpose of the check box *Fill-in Data* (previously *Populate*) is to instruct *Smart Flow* to replace automatically the data fields of this document with their corresponding values from the data panel. More information about the automatic filling-in of data into documents can be found in the manual '*Working with Data and Documents - Part 3*'.

The check boxes *Private* and *Confidential* control the user access to the document. Private documents are available only to the user that has created them. Confidential documents are available to the users that have permissions to see confidential documents.

Use the field *How to create* to specify the way to add the new document to the list:

- *Scan* – After pressing the button *OK* the screen for scanning (or importing the scanned pages) will show up. More information about working with scanned and non-scanned paper documents can be found in the manual '*Working with Data and Documents - Part 3*'.
- *Use category document* – You can select an existing document from another category or work process and link to it, or make a copy of it.
- *Use template* – You can create the new document based on existing document template. This is useful when multiple documents should be based on one or several templates. You can add the needed data fields to the template document, and later *Smart Flow* will replace those fields with the actual data values from the *Custom Data* panel, while creating the document. To check and manage the document templates select the menu *Manage / Document Templates* on the *Smart Flow* main screen. More information about document templates can be found in the manual '*Working with Data and Documents - Part 3*'.

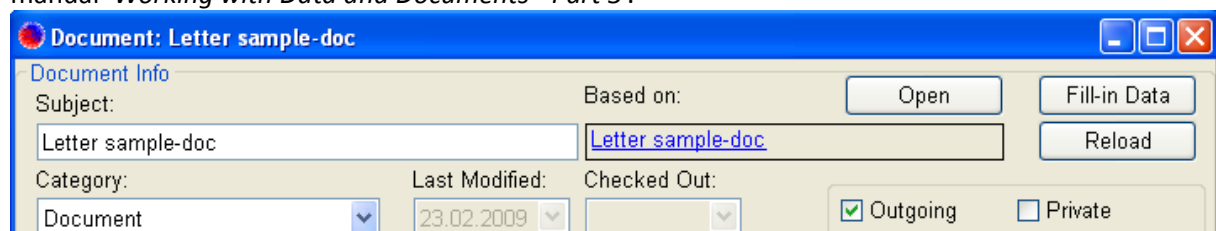
- *Import documents* – You can select existing file(s) and add them as documents. If the check box *'as link only'* is checked, only links to these files will be added as documents. Otherwise the selected files will be imported into *Smart Flow* repository database.
- *Web address* – You can enter a link to an Internet page, mailto-link or link to an external file.
- *Empty document of type* – You can create an empty electronic document of specific type.

## Document Details

To view or change the document details, right click on the document and select *View document details* from the context menu, or press the button *Details* on the right of the *Documents* panel. The screen of document details will show up. You can change here the subject of the document, or add data or notes specific to this document.

The field *Based on* shows the template document, on which this document is based. If this field is visible and not empty, it is possible to replace the current document with the original template document, in order to replace again the data fields with the actual data values. To replace the current document with the original template document press the button *Reload*.

To replace the data fields in the current document with the actual data values press the button *Fill-in Data*. More information about the automatic filling-in of data into documents can be found in the manual *'Working with Data and Documents - Part 3'*.



## Removing a Document

To delete a document from the list, right click on it and select *Delete Document* from the context menu. Confirm the document removal, and then the selected document will be deleted.

To delete all documents in the list, right click on the *Documents* panel and select *Delete All Documents* from the context menu. Confirm the removal, and then all documents from the list will be deleted.

## Notes and Related Contacts

To add a note to the selected category, press the button *New* on the right side of *Notes* panel, enter the note text, and then press the button *OK*. The note will be added to the list of notes for the currently selected category.

To add a contact related to the currently selected category, right click on the *Related Contacts* panel, and select *Add related contact* from the context menu. From the list of available contacts select the needed contact, and then press the button *OK*. A link to the selected contact will be added to the list of related contacts.

To remove a related contact from the list of related contacts, right click on that contact in the list and select *Remove related contact* from the context menu. Confirm the removal, and the link to the contact will be removed. Do mind that the contact itself will not be deleted, but only the link to it.



