

# Working with Data and Documents

## Part 2 - Work Processes

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*Explains the purpose of the work processes in Smart Flow, how to create and manage the work processes and steps, how to assign workers, or add data, documents or other related objects to each work process or step.*

### Table of Contents

<a href="#">Introduction to the Work Processes.....</a>	<a href="#">2</a>
<a href="#">The Work Processes Screen.....</a>	<a href="#">2</a>
<a href="#">Creation of a New Work Process.....</a>	<a href="#">3</a>
<a href="#">Managing the Work Processes.....</a>	<a href="#">4</a>
<a href="#">The Work Process Screen.....</a>	<a href="#">4</a>
<a href="#">Process and Steps.....</a>	<a href="#">4</a>
<a href="#">Setting the Status of the Process.....</a>	<a href="#">5</a>
<a href="#">Marking a Process or Step.....</a>	<a href="#">5</a>
<a href="#">Removal of a Work Process.....</a>	<a href="#">6</a>
<a href="#">Working with Data.....</a>	<a href="#">6</a>
<a href="#">Adding Data to the Data Set .....</a>	<a href="#">6</a>
<a href="#">Removing Data from the Data Set.....</a>	<a href="#">7</a>
<a href="#">Document Types.....</a>	<a href="#">8</a>
<a href="#">Processes and Documents.....</a>	<a href="#">8</a>
.....	<a href="#">9</a>
<a href="#">Adding a Document.....</a>	<a href="#">9</a>
<a href="#">Document Details.....</a>	<a href="#">10</a>
<a href="#">Removing a Document.....</a>	<a href="#">10</a>
<a href="#">Notes and Related Objects.....</a>	<a href="#">11</a>

## Introduction to the Work Processes

The work processes are meant to reflect the everyday work within your organization. They represent the projects, consultancies, orders, etc. your organization works on. You can manage the priority and the status of each process (not started, in progress, finished, etc.) and the corresponding start/due/end dates.

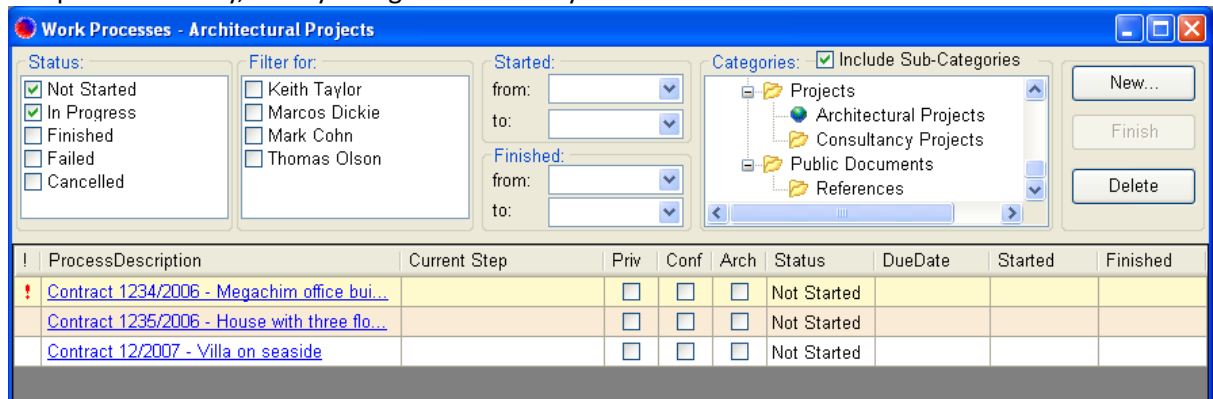
You can assign specific workers (contacts from your organization) as responsible people for each process. If the process is complex, it could be divided into steps and sub-steps. Each process or step could be marked by the assigned workers, as soon as it is ready to be finished by the superior.

The work processes could contain their own data and/or documents. These data and documents are usually related to the specific activity of the process. If many processes should contain the same or similar data sets (names and types of data) it is worth to group these processes in categories, and provide the default data sets from these categories.

If many work processes should contain documents made by template it is reasonable to create the template documents separately along with the needed data fields. You can use later these template documents in the work processes and replace automatically the data fields with the actual data values.

## The Work Processes Screen

To view, manage or create new work processes, on the *Smart Flow* main screen select the menu *Manage / Work Processes*, or press the button 'Work Processes' on the toolbar. This screen also shows up automatically, after you log-in successfully to *Smart Flow*.



On the upper left part of the screen are located the filters for the list of work processes:

- *Status* – included in the list are the work processes having one of the selected statuses
- *Filter for* – included in the list are the work processes having as workers one or more of the selected contacts
- *Started, Finished* – included in the list are the work processes having their start or end dates within the selected date ranges

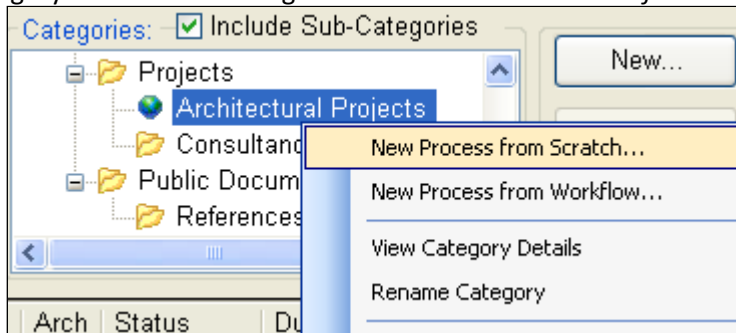
On the upper right part of the screen is shown the tree of the available categories. If the check box *Include Sub-Categories* is checked, the work processes belonging to the selected category and its sub-categories are included in the list. Otherwise only the processes belonging to the selected sub-category are included in the list.

The list of work processes, filtered by status, workers and category, is located below the filter panel. To view the details of a work process, click on the corresponding process-description link. The *Work Process* screen will show up.

Alternatively, to manage a work process without opening the *Work Process* screen, right click on the process and select the corresponding menu item from the context menu.

### Creation of a New Work Process

To create a new work process into currently selected category, press the button *New* and select *From Scratch* from the pop-up menu. To create a new work process in another category, right click on that category in the tree of categories and select *New Process from Scratch* from the context menu.

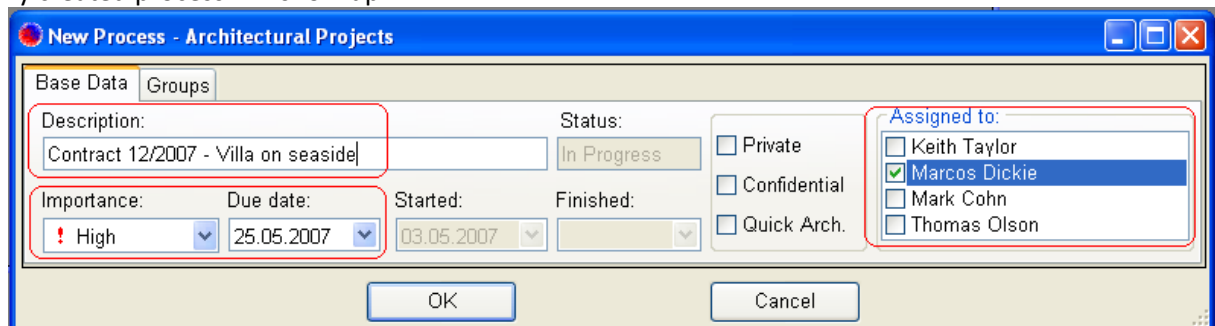


The dialog *New Process* will show up. Enter a short description of the work process, and select the workers that should be assigned to the process, if any. You can also select a due date or process importance if needed.

The check boxes *Private* and *Confidential* control the access to the work process. Private work processes are visible only to the user that has created them. Confidential processes are visible to the users that have rights to see confidential processes.

Check the fields *Status* and *Start Date*. Normally if no workers have been selected, the process will have a status *Not Started*. Otherwise the status of the process will be *In Progress*, and the start date will be set to the current date. You can also set the start date by yourself, or clear it, which will also affect the status of the process.

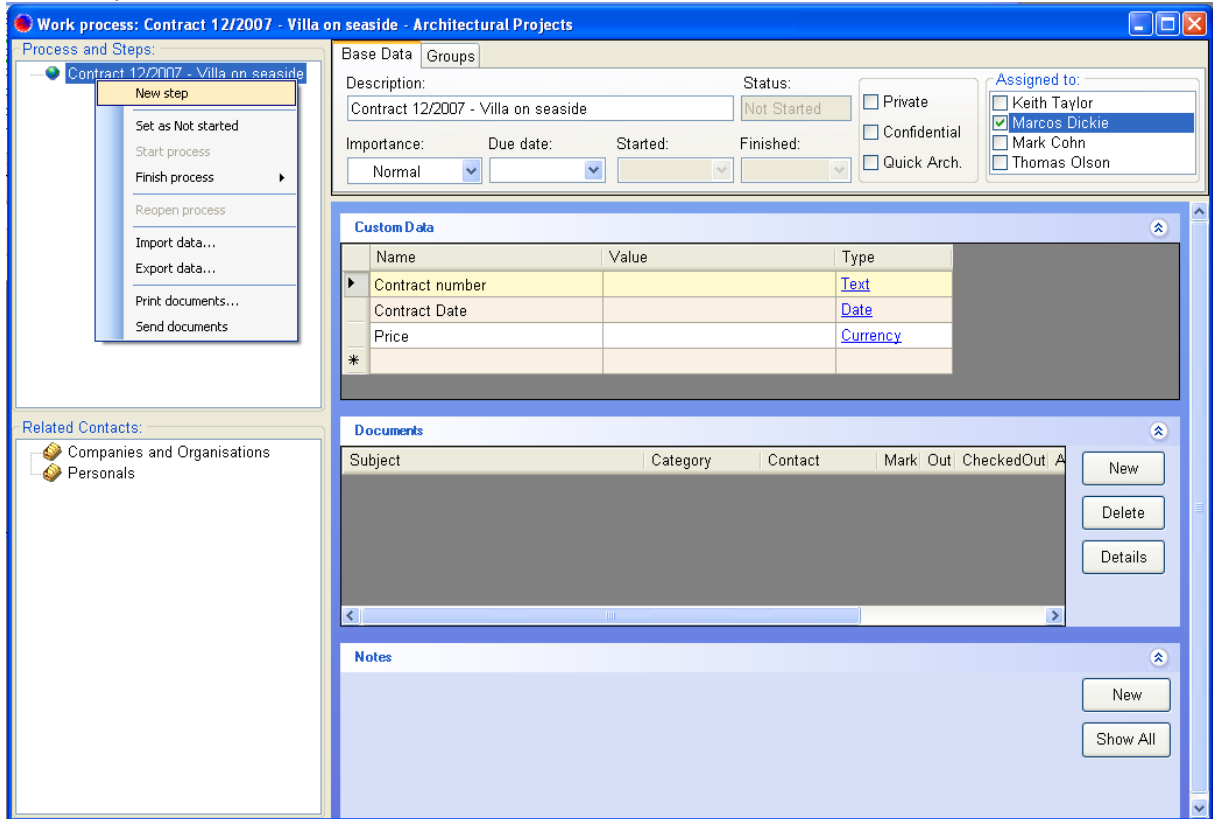
Finally press the button *OK*, and the new process will be created. The screen *Work Process* for the newly created process will show up.



## Managing the Work Processes

### The Work Process Screen

On this screen you can change the description of the process, its start/end/due dates, assigned workers, or to manage data, documents or related contacts. On this screen you can also change the status of the process.

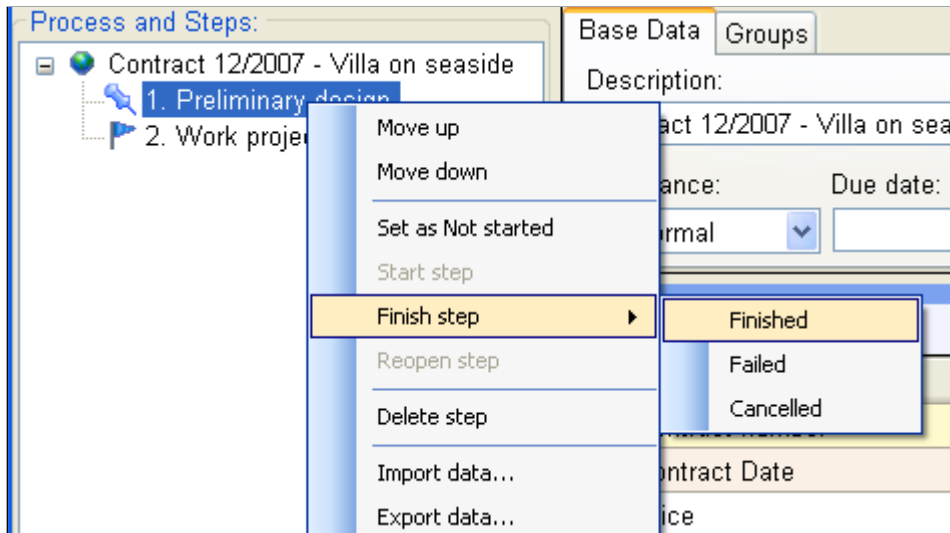


On the upper left part of the screen is displayed the tree of the work process – the process itself and optionally its steps. On the upper right part of the screen are shown the details of the currently selected process or step. Below the details panel are located the panels for data, documents and notes of the currently selected process or step. On the lower left part of the screen are shown the panels of the other related objects – related processes, appointments or contacts.

### Process and Steps

If the process itself is too complicated, you can add steps to it. To each step you can assign workers, change its status, add sub-steps, etc. To add a new step to the process, right click on the process in the tree and select *New Step* from the context menu.

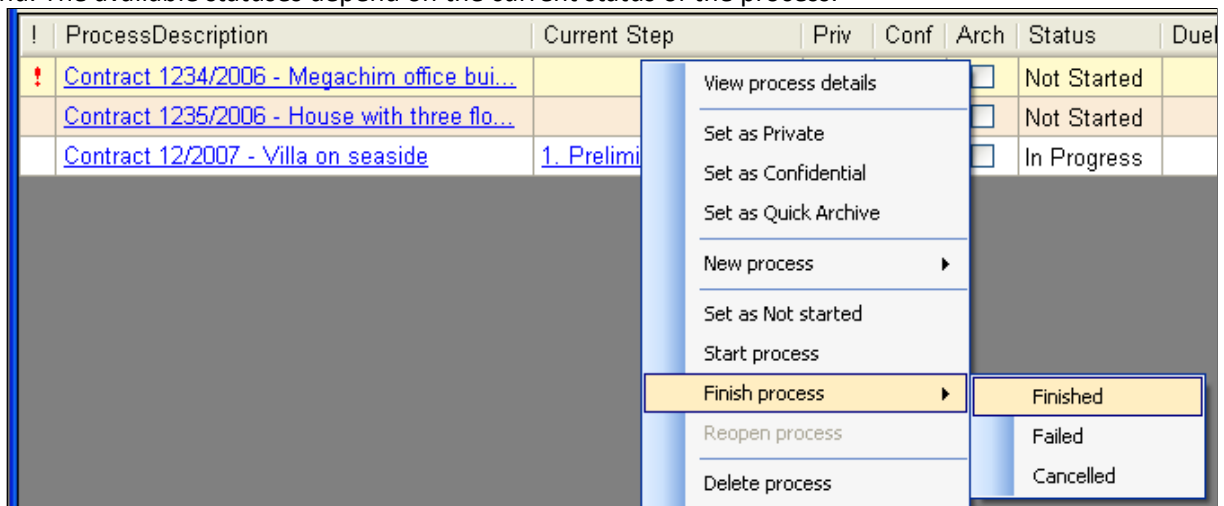
Working with the steps is the same as working with the process itself – they have the similar details, status, dates and workers assigned. You can also move the steps up or down – right click on the step in the tree and select *Move up* or *Move down* from the context menu. To delete a step, right click on the step in the tree and select *Delete step* from the context menu.



**Setting the Status of the Process**

Each work process or step can (and should) go through different stages - not started, in progress, paused or finished. To change the status of the process or step, right click on it in the tree of the work process and select the new status from the context menu. The available statuses depend on the current status of the process or step. Keep also in mind that if you set or clear manually the start or end date on the details panel, the status of the process or step will change as well.

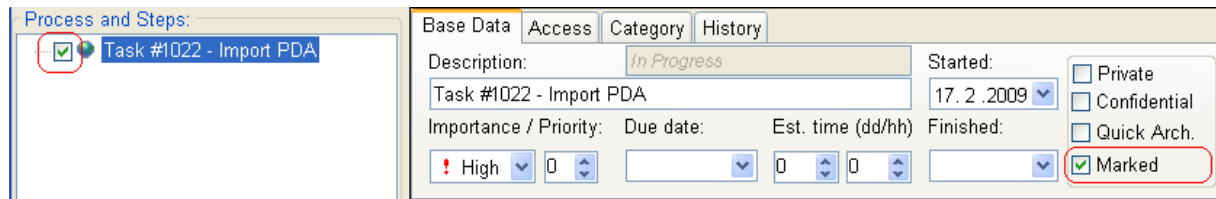
You can also change the status of the process directly on the *Work Processes* screen. To change the status of a process, right click on the process in the list and select the new status from the context menu. The available statuses depend on the current status of the process.



**Marking a Process or Step**

Each process or step could be marked by the assigned workers, as soon as it is ready to be finished by the superior. This sends a notification to the other workers and to the user that has created the process – usually this is the superior. Marking provides an easy way to track the processes which are ready to be checked and optionally finished.

The superior usually checks the implementation and finishes the process or step if the check is successful. Otherwise the superior could unmark the process or step in order to signal to the workers that the work on this process or step should continue.



Marking and unmarking of work processes are also accessible directly on the *Work Processes* screen. To mark or unmark a work process, right click on the process in the list and select *Mark process* or *Unmark process* from the context menu.

## Removal of a Work Process

Usually the work processes should not be deleted. As they become finished they normally disappear from the list on the *Work Processes* screen. It is recommended to keep all processes as long as possible. This would allow subsequent searching in them, their data or documents. This would also allow subsequent referring to them from other processes.

Nevertheless, if you have decided to delete a process, right click on it in the list on *Work Processes* screen and select *Delete process* from the context menu. Confirm that you are sure about this removal, and then the work process will be deleted.

If the work process contains steps, these steps will be deleted too, along with all data, documents and other relations they or the process itself contain. Deleted objects could be restored later if needed by the *Smart Flow* administrator.

## Working with Data

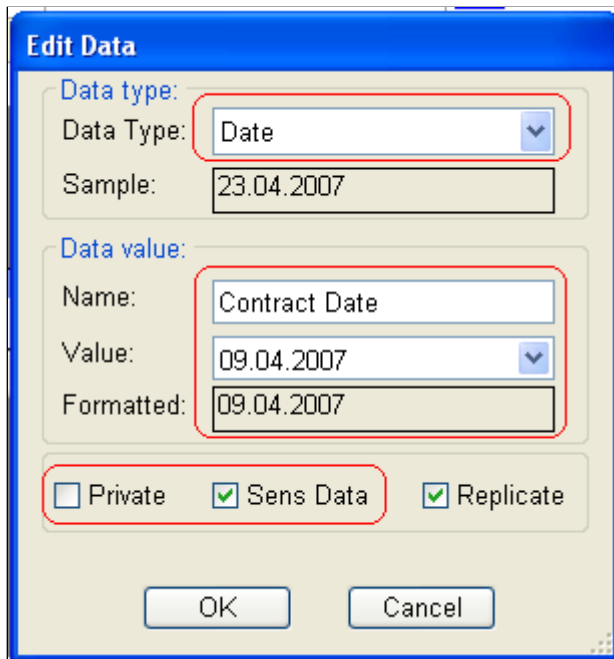
The work processes and their steps could contain a set of data related to the specific activity of the process. If many processes should contain the same or similar data sets (names and types of data) it is worth to group these processes in categories, and provide the default data sets from these categories.

### Adding Data to the Data Set

Locate the *Custom Data* panel on the right part of the *Work Process* 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.

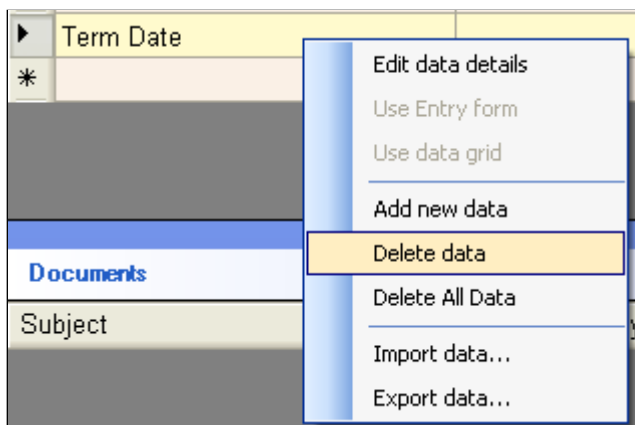
The check boxes *Private* and *Confidential* control the user access to the data field. The private data is available only to the user that has created it. The confidential data is available to the users that have permissions to see confidential information.

The check box *Replicate* controls whether the data field will be copied to the steps or sub-steps, which will be created later in this work process or step.

### 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.

## Processes and Documents

For each work process or step you can add documents of all types listed above. These documents are usually related to the specific activity of the process. If many work processes or steps should contain documents made by template it is worth to create the template documents separately along with the needed data fields. You can use later these template documents in the work processes or steps and automatically replace the data fields with the actual data values.

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 the 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*'.



Documents						
Subject	Category	Contact	Mark	Out	Modified	
SmartFlow-presentation2	Description		<input type="checkbox"/>	<input type="checkbox"/>	29.05.2007	
SmartFlow-presentation2-bg			<input type="checkbox"/>	<input type="checkbox"/>	29.05.2007	

Open Document  
 Fill-in Data  
 View Data to Fill-in...

### Adding a Document

The easiest way to add an existing document (file) or a link to an existing document to the selected work process or step 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 work process or step, press the button *New* on the right side 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 an 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.

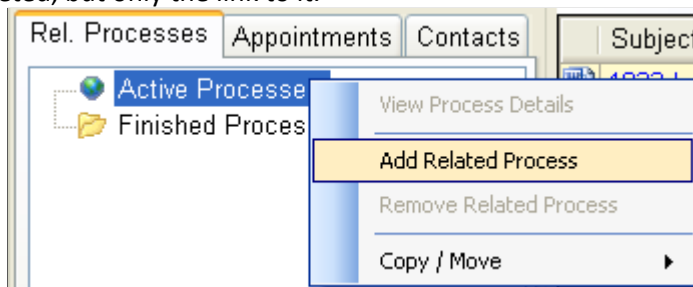
To delete all documents in the list, right click on the *Documents* panel and select *Delete All Documents* from the context menu. Confirm the removal, and then all documents from the list will be deleted.

## Notes and Related Objects

To add a note to the currently selected work process or step, 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 process or step.

To add a process or step related to the currently selected process or step, drag it and drop it into *Rel. Processes* panel, or right click on the *Rel. Processes* panel and select *Add Related Process* from the context menu. Then from the list of available active processes and steps select the needed one and press the button *OK*. A link to the selected process or step will be added to the list of related processes.

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



To add a contact related to the currently selected process or step, right click on the *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.

