

Working with Data and Documents

Part 3 – Advanced

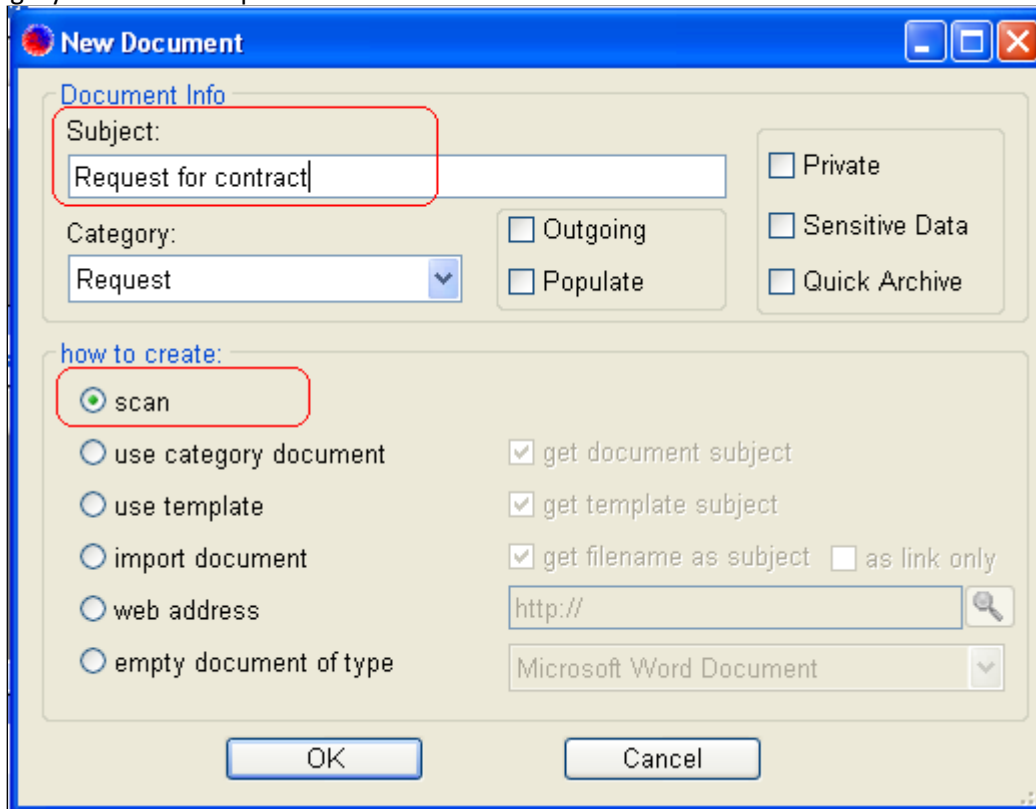
Describes the work with scanned and paper documents in Smart Flow, the template documents and their data fields, and the automatic filling-in of data into documents

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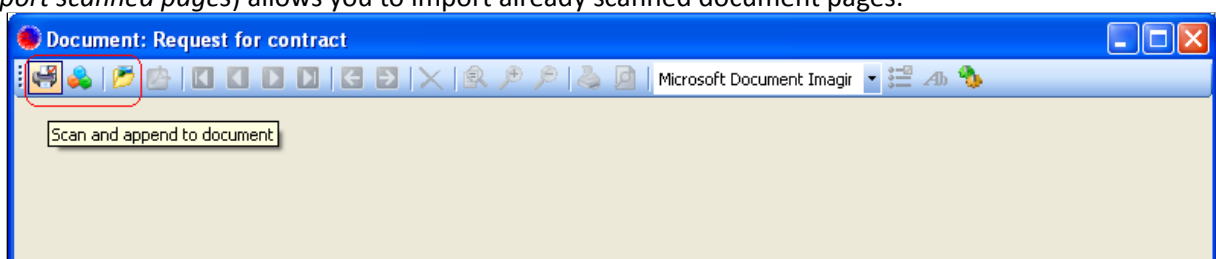
Scanned or Paper Documents

Smart Flow can work with various types of documents, including scanned or paper documents. To create a scanned or paper document, when adding a new document into the *Documents* panel on the field *How to Create* select *Scan*. Enter a subject (short description) for the document, select its category if needed and press the button *OK*.



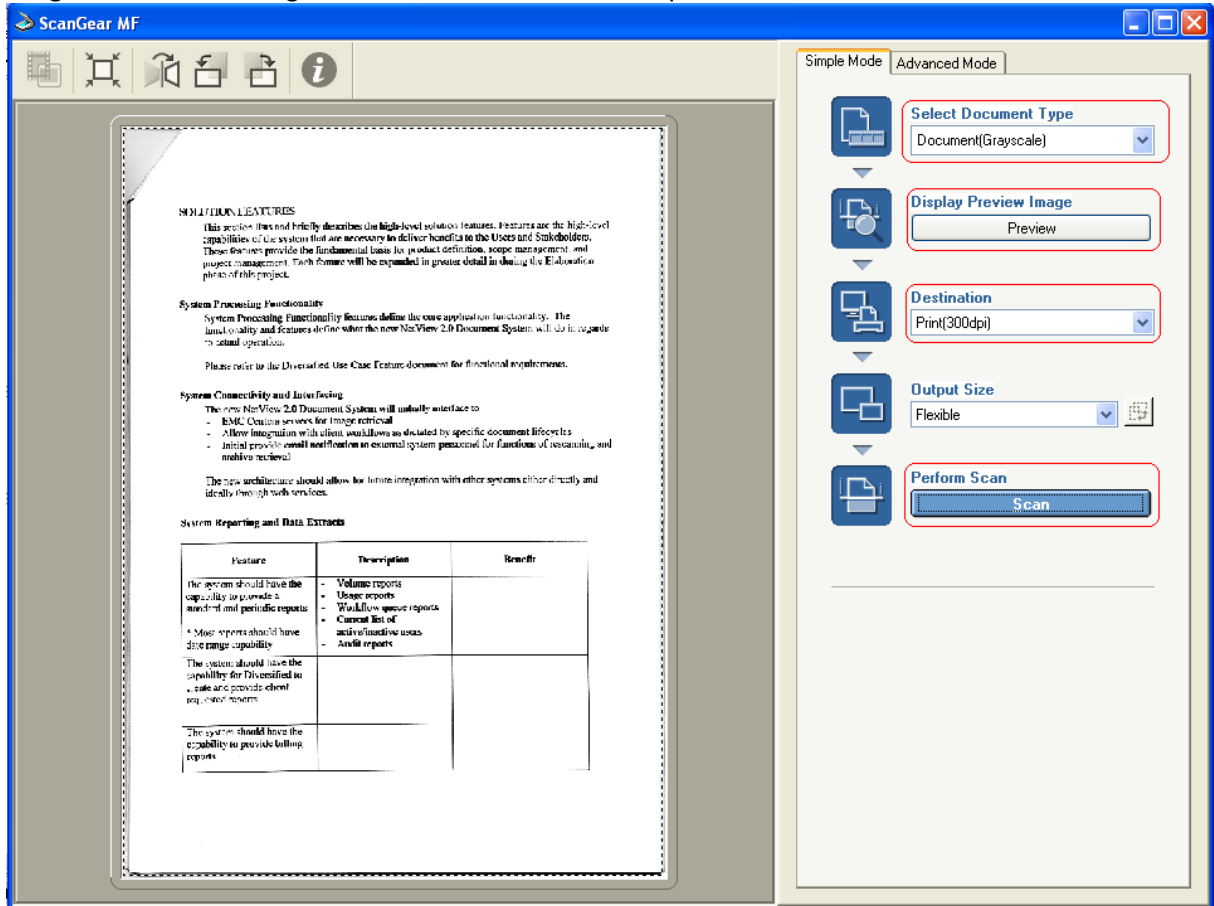
The screen of the scanned/paper document will show up. It is initially empty. If you just like to have this document as a reference to a paper document, close this screen.

Look at the toolbar located on upper part of the screen. The first button (*Scan and append to document*) starts the scanning software installed on your machine, and uses the default scanner. The second button (*Select source*) allows you to select another scanner, if needed. The third button (*Import scanned pages*) allows you to import already scanned document pages.



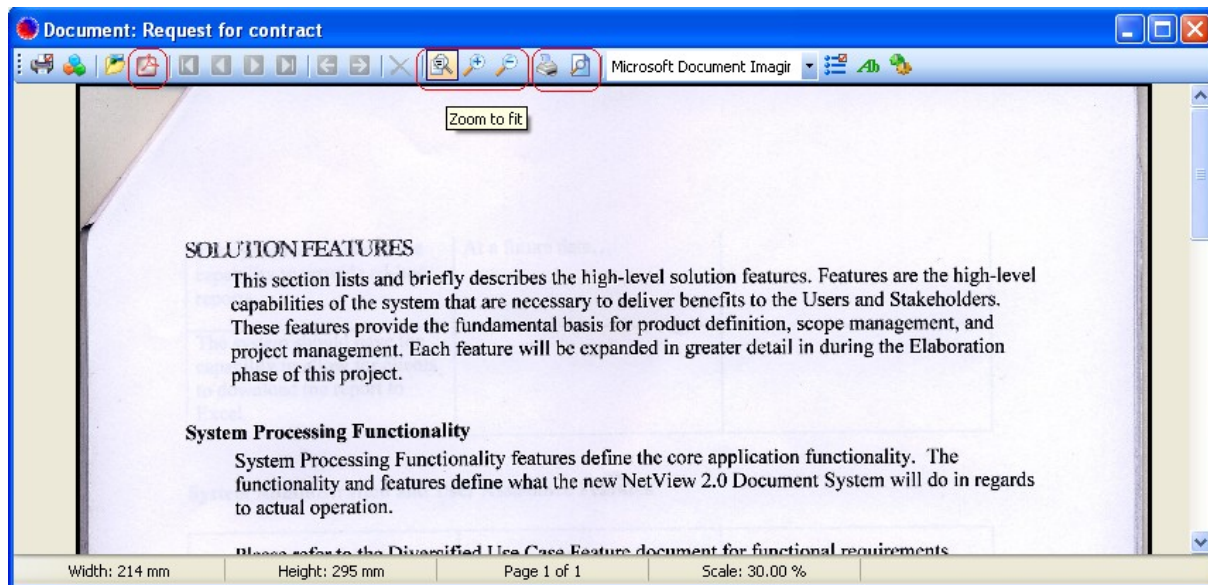
If you press the button *Scan and append to document*, the scanning dialog will show up. The exact dialog depends on the currently installed scanner and scanning software, and might look little bit different, but the functionality should be generally the same.

On the scanning dialog you can choose how to scan the document – in colors, black-and-white, or gray-scale. You can also select the scanning resolution (300 dpi, 600 dpi, etc.). Mind that the colorful scanned documents take much database space, as well as the documents scanned with a high resolution. For the normal text documents it is good enough to use black-and-white or gray-scaled scanning and lower scanning resolution – for instance 300 dpi.



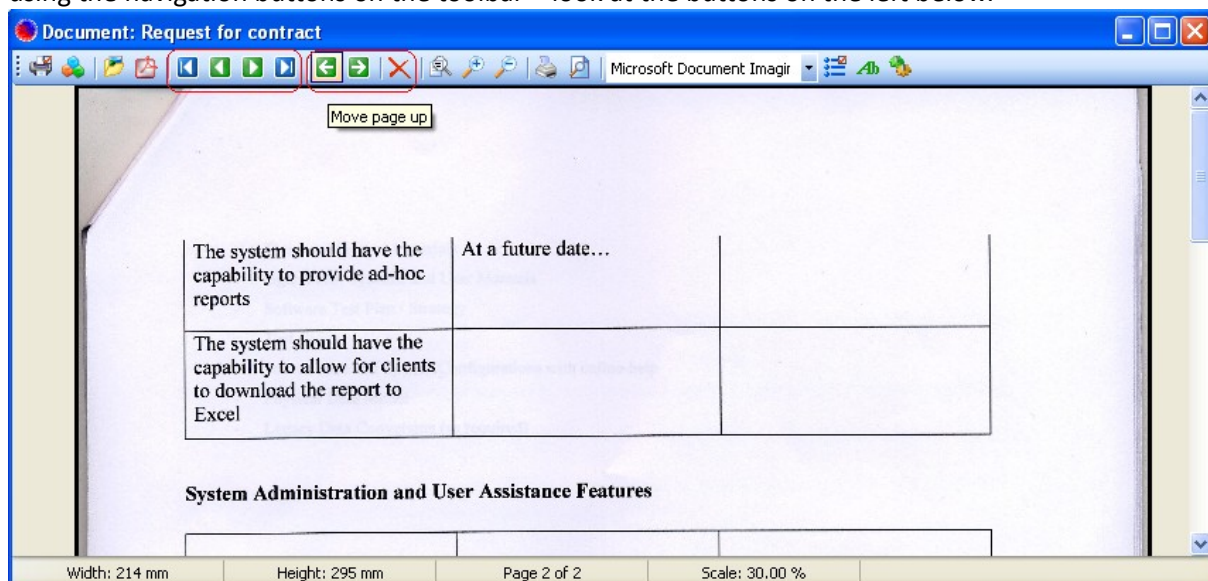
You can press the button *Preview* to see how the scanned document will look like. When you are ready to scan, press the button *Scan*. The document will be scanned and you will return to the screen of the scanned document.

You can zoom in or zoom out the scanned page by using the zooming buttons –look at the buttons with magnifying glasses below. The zooming does not change the scanned page. It changes only its appearance on the screen.



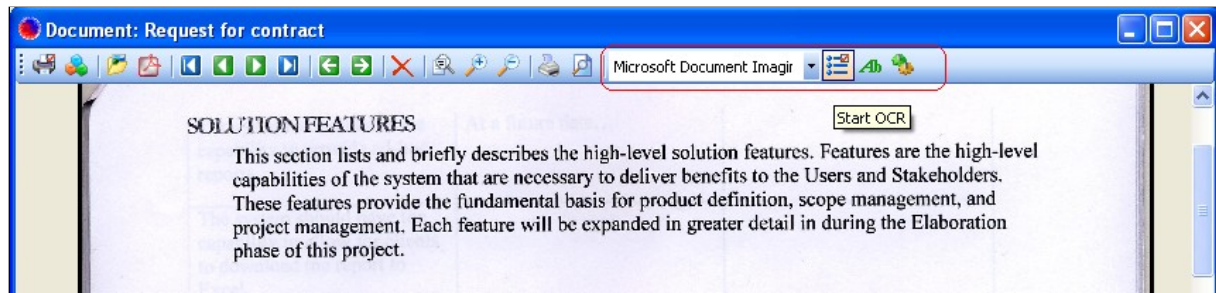
You can print/preview the scanned document, or export it as a *PDF* file. To print or preview the scanned document, use the buttons on the toolbar for printing or previewing. To export the scanned document into *PDF*-file, use the button for exporting into *PDF* file.

You can add more pages to the current document by using the button *Scan and append to document*. When the document has more than one scanned page you can navigate from one page to another by using the navigation buttons on the toolbar – look at the buttons on the left below.

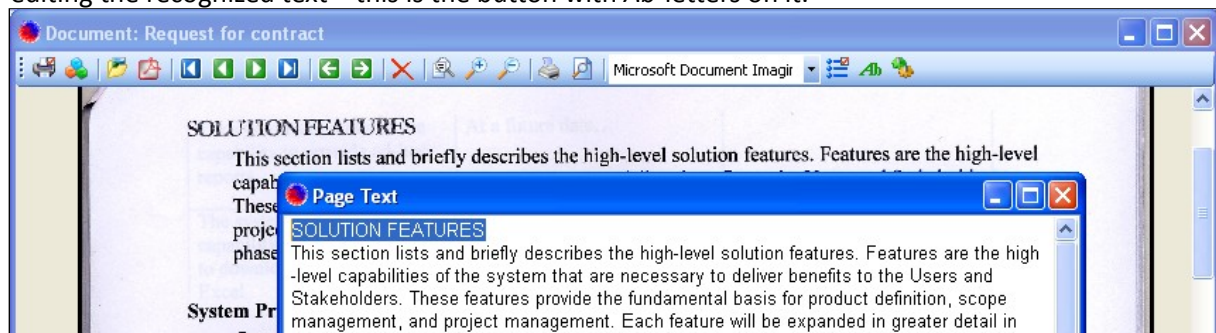


You can also move the misplaced pages up or down. To do it, use the buttons for moving up or down the current page – look at the green buttons with arrows above. To delete a wrongly scanned page, use the button for deleting of the scanned page –this is the button with the red X.

If you like to be able to search later for a specific text in the scanned document, you need to recognize the text by using proper *OCR* software. If you have *OCR* software installed, that is supported by *Smart Flow*, you can choose the *OCR* provider in the combo box (look below), and press the toolbar button for the text recognition located next to the combo box. If you don't want to recognize the text, leave the combo box empty, or select *<No Text OCR>*.



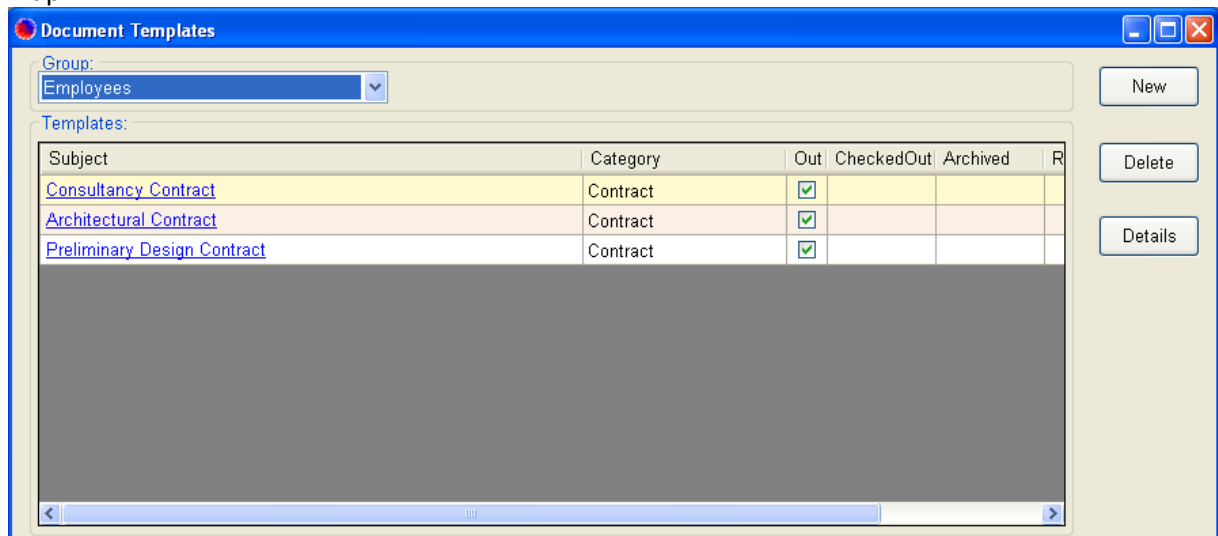
If you don't have proper OCR software installed, you can also manually enter the needed text or key words. To inspect the recognized text or to enter the text or key words manually, press the button for editing the recognized text – this is the button with *Ab*-letters on it.



The Template Documents

Very often many documents created in the office are made by template. Usually the contents of such documents are the same, and only the data filled-in into each document differs. It is worth to create the template documents separately along with the needed data fields in them. You can use later these template documents to create the real documents for the work processes or steps, and automatically replace the data fields with the actual data values.

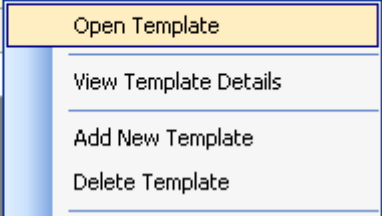
To inspect the existing template documents or to create new template documents, select the menu *Manage / Document Templates* on the *Smart Flow* main screen. The screen *Document Templates* will show up.



Use the combo-box *Group* to select a group of users. Below the selected group will be displayed the list of template documents available to this group of users.

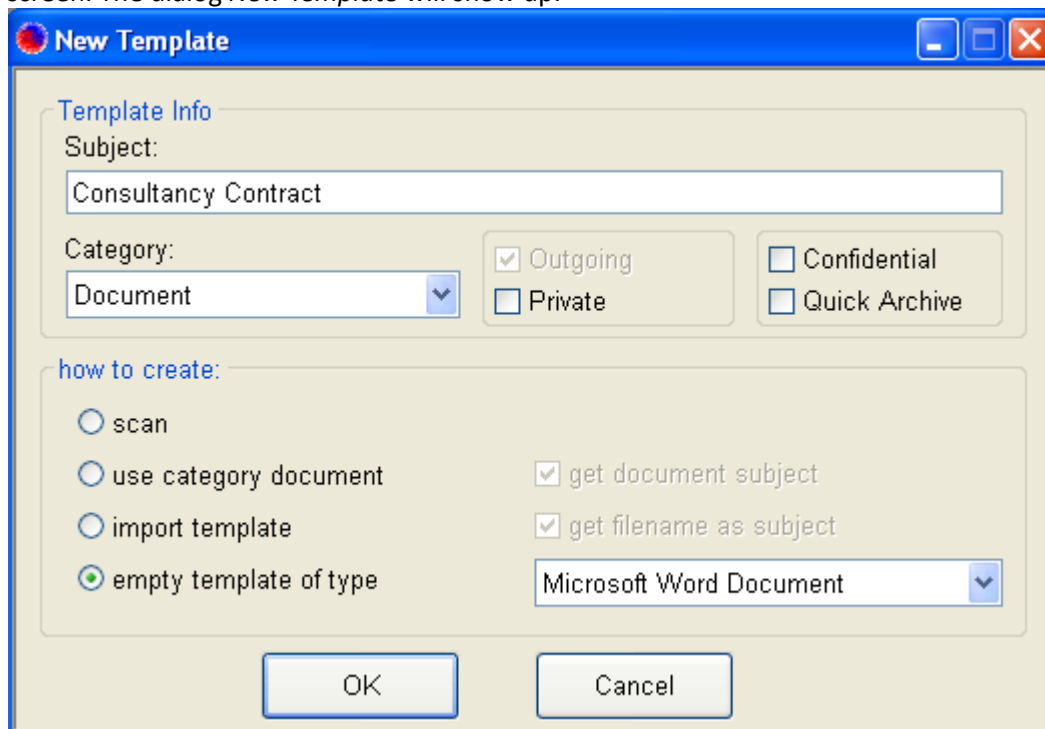
To open a template document from the list, click on the document's subject in the list, or right click on the document and select *Open Template* from the context menu.

Subject	Category
Consultancy Contract	Contract
Architectural Contract	Contract
Preliminary Design Contract	Contract



Adding a Template

To add a new template document for the selected group press the button *New* on the right side of the screen. The dialog *New Template* will show up.



The field *Subject* could be used to provide meaningful name for the template 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 check boxes *Private* and *Confidential* control the user access to the template document. Private templates are available only to the user that has created them. Confidential templates are available to the users that have permissions to see confidential template documents.

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

- *Scan* – After pressing the button *OK* the screen for scanning (or importing the scanned pages) will show up. If you need more information about how to work with scanned or paper documents, look at the section *Scanned or Paper Documents* above.
- *Use category document* – You can select an existing document from a category or work process and copy it as a template document.
- *Import template* – You can select an existing file and add it as a document template.
- *Empty template of type* – You can create an empty document template of specific type.

Template Document Details

To view or change the template document details, right click on the template document and select *View Template Details* from the context menu, or press the button *Details* on the right of the screen. The screen of the template details will show up.

You can change here the subject of the template, or add data or notes specific to this template. **When the template document is used later for the creation of a new document, the data fields will be copied to the newly created document.**

Removing a Template Document

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

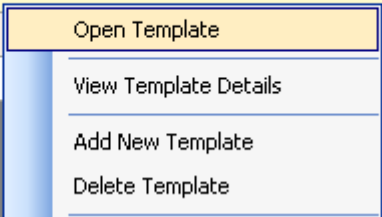
Filling-in of Data into Documents

One of the best features of *Smart Flow* is that it allows automatic filling-in of data into documents. This is very useful for documents which are made by template. In this case it is worth to create the template documents separately along with the needed data fields in them. You can use later these template documents to create new documents for the work processes or steps, and automatically to replace the data fields with the actual data values from the *Custom Data* panel.

Adding Data Fields to a Template Document

To be able to add the data fields, first create or open the needed template document. You can access the *Document Templates* screen by selecting the menu *Manage / Document Templates* on the *Smart Flow* main screen.

Subject	Category
Consultancy Contract	Contract
Architectural Contract	Contract
Preliminary Design Contract	Contract



Let's suggest that the text of the template document is already entered. To replace a word or phrase of the text with a data field, just replace the needed word or phrase with the text **[data_field_name]**, where *data_field_name* is the name of the data field, as it will appear in the *Custom Data* panel. Mind that in the template document all data fields need to be surrounded by brackets, so that *Smart Flow* could locate and replace them later with the actual data values.

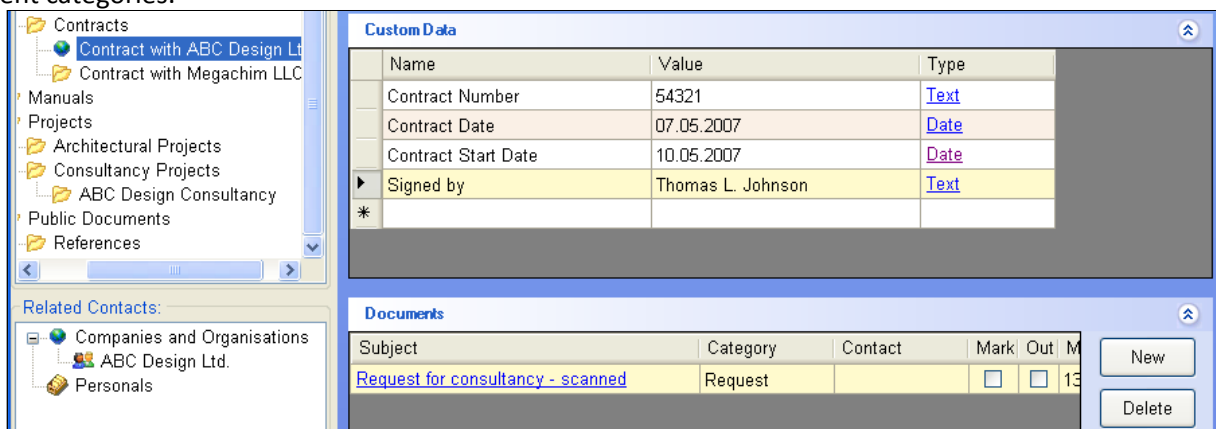
Look at the sample below. The data fields in the text are: *Contract Number*, *Contract Date*, *Contract Start Date* and *contact_company_name*. These data fields (except the last one) will be replaced with the corresponding data values from the *Custom Data* panel. The last field is a system data field. Its value is being set internally by *Smart Flow*. The system data fields could be used in the template documents the same way as the custom data fields. The list of the available system data fields can be found in the section *List of the System Data Fields* below.



The Actual Data Values

To use the template document with data fields, first you need to have the corresponding data fields with values. Check the *Custom Data* panel to ensure, that all needed data fields along with their values are there. Enter the missing data fields or values, as to the data fields in the template document.

If many work processes or categories use the same or similar data sets, it would be better to group these work processes or subcategories into categories, and provide the default data sets from these parent categories.



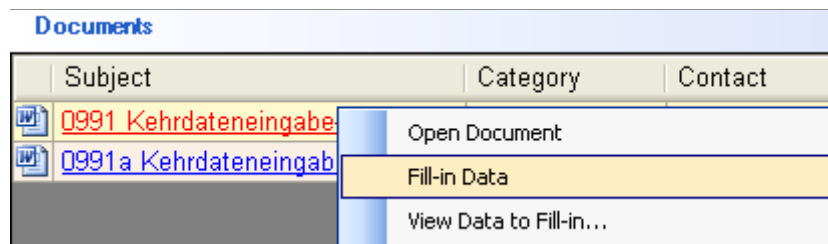
Using the Template Document

To create the real document based on the template, press the button *New* on the right side of the *Documents* panel, and for *How to create* select *Use Template*. Also check the check box *Fill-in Data*, **only if all needed data fields are already present in the *Custom Data* panel**. Then choose the needed document template and press the button *OK*. You will get a new document based on the template document, having all its data fields replaced with the actual data values.

CONSULTING AGREEMENT
54321 / 07.05.2007

This Consulting Agreement ("Agreement") is made and entered into as of the **10.05.2007** by and between **ABC Design Ltd.** (the "Company"), located at Marwitzer St. 71 , Hamburg, HH 82151 and **My Company Ltd.** located Vladislav Blvd. No 78, Varna 9019, Bulgaria ("Consultant"). The Company desires to retain Consultant as an independent contractor to perform certain consulting and software development services for the Company and Consultant is willing to perform such services, on terms set

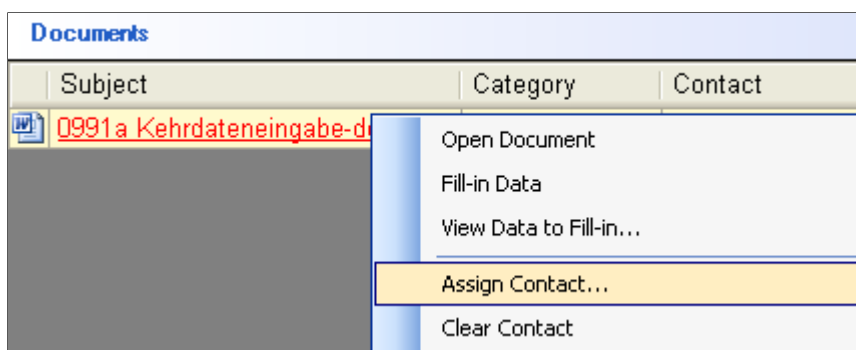
If not all data fields are yet present in the *Custom Data* panel, **do not check the check box *Fill-in Data***. In this case you can fill-in the data into the document later. To do so, right click on the document in the list and select *Fill-in Data* from the context menu.



Documents and Contacts

You can assign a contact to each document in order to personalize it. If there are system data fields related to a contact (that is *[contact_*]*) in the used template document, **you need to assign a contact** to the document.

To assign a contact to the document, right click on the document and select *Assign Contact* from the context menu. The *Choose Contact* dialog will show up. Select the needed contact and press the button *OK*. The selected contact will be assigned to the document. An alternative way of assigning contact is to drag the contact and drop it over the document in the *Documents* panel.



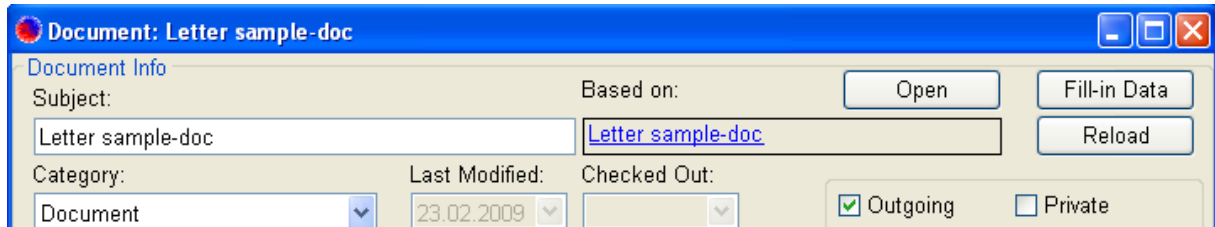
To remove the relation between a document and a contact, right click on the document and select *Clear Contact* from the context menu. Confirm that you are sure, and the relation between the document and the contact will be removed.

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 the 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*.



List of the System Data Fields

Below is the list of the system data fields. These fields have their values set internally by *Smart Flow*. You can use them in the documents or document templates.

Data Field Name	Description
<code>doc_subject</code>	The subject of the current document
<code>doc_category</code>	The document category of the current document
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<code>user_username</code>	The user name of the current user
<code>user_first_name</code>	The first name of the current user
<code>user_last_name</code>	The last name of the current user
<code>user_address1</code>	The address of the current user (1 st line)
<code>user_address2</code>	The address of the current user (2 nd line)
<code>user_city</code>	The city of the current user
<code>user_state</code>	The state of the current user
<code>user_zip</code>	The ZIP or postal code of the current user
<code>user_phone</code>	The phone number of the current user
<code>user_fax</code>	The fax number of the current user
<code>user_email</code>	The e-mail address of the current user
<code>user_mobile</code>	The mobile phone number of the current user
<hr/>	
<code>contact_display_name</code>	The names of the related contact
<code>contact_title</code>	The title of the related contact

<code>contact_first_name</code>	The first name of the related contact
<code>contact_last_name</code>	The last name of the related contact
<code>contact_job_title</code>	The job title of the related contact
<code>contact_company_name</code>	The company of the related contact
<code>contact_address1</code>	The address of the related contact (1 st line)
<code>contact_address2</code>	The address of the related contact (2 nd line)
<code>contact_city</code>	The city of the related contact
<code>contact_state</code>	The state of the related contact
<code>contact_zip</code>	The ZIP or postal code of the related contact
<code>contact_phone</code>	The phone number of the related contact
<code>contact_fax</code>	The fax number of the related contact
<code>contact_email</code>	The e-mail address of the related contact
<code>contact_mobile</code>	The mobile phone number of the related contact
<code>contact_home_phone</code>	The home phone number of the related contact
<code>contact_home_fax</code>	The home fax number of the related contact
<code>contact_home_email</code>	The home e-mail address of the related contact

<code>category_descr</code>	The description of the current category
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<code>process_descr</code>	The description of the current work process
<code>process_importance</code>	The importance of the current work process
<code>process_due_date</code>	The due date of the current work process
<code>process_current_step</code>	The current step (task) of the current work process
<code>process_started_on</code>	The start date of the current work process
<code>process_started_by</code>	The user, who has started the current work process
<code>process_finished_on</code>	The end date of the current work process
<code>process_finished_by</code>	The user, who has ended the current work process

<code>workflow_descr</code>	The description of the current workflow template
<code>workflow_importance</code>	The importance of the current workflow template
<code>workflow_due_days</code>	The due days of the current workflow template

<code>appoint_subject</code>	The subject of the current appointment
<code>appoint_location</code>	The location of the current appointment
<code>appoint_category</code>	The appointment category of the current appointment
<code>appoint_importance</code>	The importance of the current appointment
<code>appoint_start_time</code>	The start date and time of the current appointment
<code>appoint_end_time</code>	The end date and time of the current appointment
