Starting the Work with ISS Smart Flow

Describes in short the main features of ISS Smart Flow, how to reach them, and in which order to use these features, when you start working with the product

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Users and Groups

First you should create the needed users and groups of users. Mind that if you're using the free version of *Smart Flow*, you're limited to one user only. In this case you can skip this step.

To create the needed groups, on the *Smart Flow* main screen select the menu *Admin / Groups*. Usually the groups match the departments or work groups within your organization. At the beginning create only the most obvious groups, and assign them the needed permissions (rights).
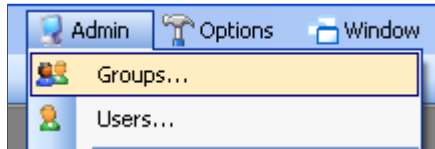

To create the needed users, on the *Smart Flow* main screen select the menu *Admin / Users*. The users are the people, which will be allowed to log-in and work with the product. At the beginning create only the most needed users, and assign them to the corresponding groups. Avoid assigning permissions (rights) directly to the users. It would be easier to maintain the overall security, if you assign or revoke the permissions rather to the groups to which these users belong.
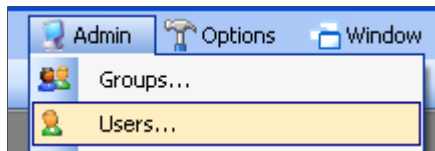
More information about how to manage the users and groups you can find in the manual '*Creation of Users and Groups*'. All manuals are available at: http://www.iss-bg.com/support.html

Contacts

 To create the needed contacts on the *Smart Flow* main screen select the menu *Manage / Contacts*, or press the button '*Contacts*' on the toolbar.
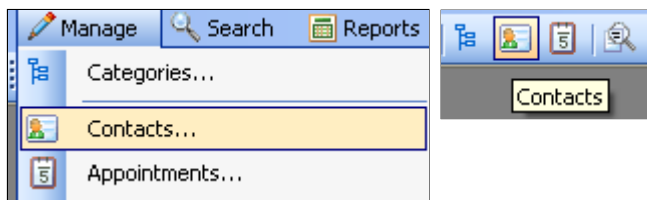
You could create initially only the contacts of the workers – these are the people, which could be assigned as responsible persons to the work processes, or as participants - to the meetings and appointments. You could also add the most frequently used normal contacts – the individuals,

companies or organizations your organization works with. These contacts could be related later to various categories, work processes or appointments.

Keep in mind that when you create new users, Smart Flow automatically creates their corresponding worker-contacts and relates the new users to these contacts.

More information about how to manage the contacts you can find in the manual '*Working with Contacts*'. All manuals are available at: http://www.iss-bg.com/support.html

Categories

To create the needed categories, on the *Smart Flow* main screen select the menu *Manage / Categories*, or press the button '*Categories*' on the toolbar.
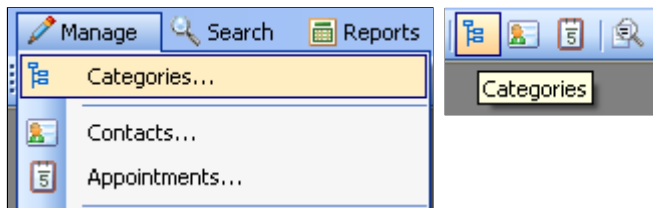

The categories are folders, in which the similar work processes could be grouped. For instance work processes related to a specific activity (e.g. Rentals, Projects, Cases, Consultancy, etc.), or to specific clients, could be grouped into the corresponding categories.

For the beginning you could create several categories you consider as the most important, or you can use only the root category for all work processes. You can create additional categories later, and move or drag-drop some work processes from the root category into another category.

More information about how to work with the categories you can find in the manual '*Working with Data and Documents (Part 1 – Categories)*'. All manuals are available at: http://www.iss-bg.com/support.html

Work Processes

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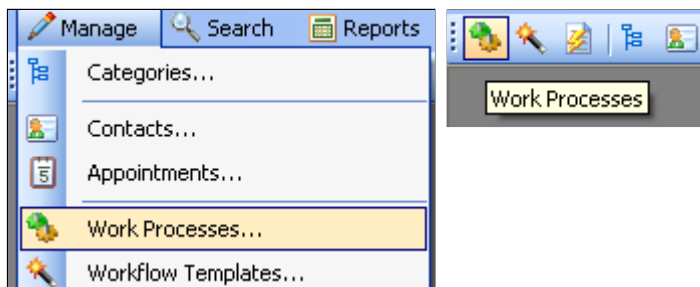
The work processes are meant to reflect the everyday work within your organization. They represent the projects, consultancies, orders, etc. your organization works on. You can manage the priority and the status of each process (not started, in progress, finished, etc.) and the corresponding start/due/end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

You can assign specific workers (contacts from your organization) as responsible persons for each project. If the process is complex, it could be divided into steps and sub-steps. You can assign specific data and documents to each 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.

More information about how to manage the work processes you can find in the manual '*Working with Data and Documents (Part 2 – Work Processes)*'

Appointments

To create new appointments, on the *Smart Flow* main screen select the menu *Manage / Appointments*, or press the button '*Appointments*' on the toolbar.
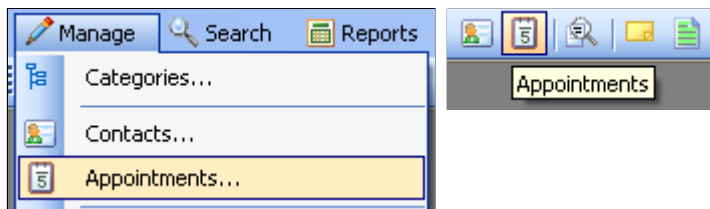
Smart Flow provides shared calendar for meetings and appointments, available to all users. It looks similar to the *MS-Outlook*'s calendar, but it is multi-user. The calendar allows you to create multiple single or recurring appointments. You can set appointment reminders at certain time before the start time of each appointment. You can also relate each appointment to a work process.

More information about how to manage the appointments you can find in the manual '*Working with the Calendar for Meetings and Appointments*'. All manuals are available at: http://www.iss-bg.com/support.html

Messages

You can use the internal messaging system of *Smart Flow* to send short messages, graphics or files to the other *Smart Flow* users. To open the *Send Messages* screen, on the *Smart Flow* main screen select the menu *Messages / Send Message*, or press the button '*Send Message*' on the toolbar.

You can send the messages or pictures no matter if the other user is online or offline. Apart from sending and receiving messages and notifications, you can also inspect the full history of the conversations with all or a specific user, the last conversation only, or to search for messages and conversations containing a specific text.

Documents, Templates, Data

Smart Flow is meant *to* work 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. The text of scanned documents could be recognized for a later text search by using the available OCR software.

- *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.

More information about how to work with the data, documents and templates you can find in the manual '*Working with Data and Documents (Part 3 – Advanced)*'. All manuals are available at: http://www.iss-bg.com/support.html