



SmartWork[®]

Correspondence Management and more...

➤ **Dynamic Correspondence Management Solution**

- Flexible Routing Configuration
- Customizable Metadata
- Customizable Reports
- Less Training Involved

➤ **OpenText Module Integrations**

- OpenText Content Server (documents, forms, workflows)
- OpenText Enterprise Scan
- OpenText Records Management
- OpenText Electronic Signature (plugin)
- Brava! for Content Server (plugin)

Advanced Search

Intelligent Archiving

Integrations: MOSS, SAP, Oracle

Industry Specific Add-ons

Document Management

Multi-language

Responsive Interface

Integrated Administration

Workflow Engine

Inbox Classification

Reference Generation

Barcode Generation

Instant Notifications

Records Management

Document Relations

Tracking & Audits

Escalation & Delegation

Analytics & Reports

Annotation & Redaction

Security Clearance

Content Circulation

Ad-hoc Workflow

Organization Chart

Electronic Signature

Physical Objects



opentext™

OpenText Content Suite

Cloud, On Premise (Windows, RedHat)

Basic	Extended
<ul style="list-style-type: none">➤ Enterprise Scan Integration➤ Brava! Integration➤ Electronic Signature Integration➤ Basic Reporting➤ Barcode TIFF➤ Analytics➤ Security Clearance➤ Automatic Escalation➤ Automatic Reference Generation➤ Instant Notification➤ Outlook Integration➤ Inbox Classification and Advanced Filters➤ Content Circulation➤ Content Type Prerequisites➤ Ad-hoc Workflows➤ Workflow Map Extensions	<p>Basic +</p> <ul style="list-style-type: none">➤ Records Management Integration<ul style="list-style-type: none">➤ Auto-classification➤ Retention Schedule➤ Physical Objects Integration<ul style="list-style-type: none">➤ PO Item Creation➤ PO Locations➤ Extended Reports➤ Barcode PDF➤ Document Templates➤ Integrated Imaging

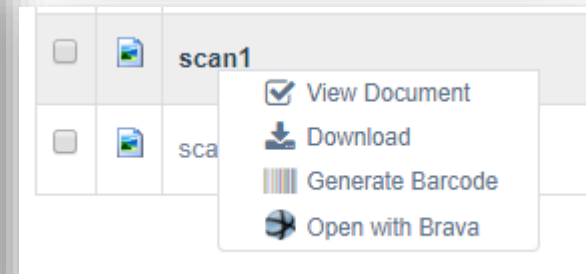
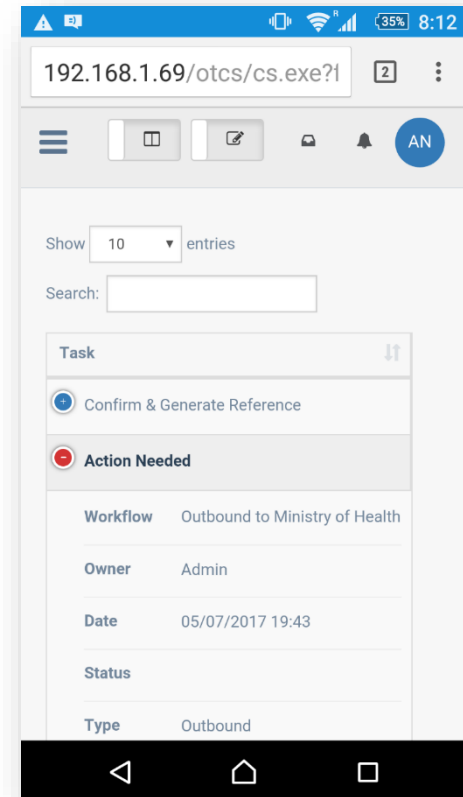
➤ Responsive Interface

The Web-based UI reacts to the amount of available space and tempts to think about just your desktop, phone or tablet.

- Multiple barcode types

➤ Barcode Generation

You can generate barcode to label documents and track their circulation across the organization. You can also stamp barcode on scanned content.



➤ Executive Interface

The Web-based UI can be switched to Executive mode. Less clicks are needed to read document and finish work.

Review & Finalize Correspondence

Workflow: Inbound from [redacted] signingpage.pdf Sample_Bad.tif Complete Task

Owner: Admin

Date: 19/11/2017 12:52

[More Details ▼](#)

Task Two

Workflow: Adhoc Workflow Urgent PO for [redacted] Complete Task

Owner: Admin

Date: 15/11/2017 16:40

[More Details ▼](#) Delegate To

Action Needed

Workflow: Correspondence for Assoufid Appraisal.TIF Complete Task

Owner: Admin

Date: 20/10/2017 10:59

[More Details ▼](#) Letter Template.docx

Distribute Correspondence

Workflow: Correspondence for Aswar ArabicSample3.docx Complete Task

Owner: Admin

Date: 19/10/2017 15:59

[More Details ▼](#) Original WindowsXP.pdf Sample_Normal.tif

🔍 📶 44% 7:04

Task One

Workflow: Adhoc Workflow Confidential PO

Owner: Admin

Date: 20/09/2017 20:39

Type: Inbound

Priority: Low

Reference:

🔄
📄
—
🔍
⚙️

Less Details ▲

Sample_Bad.tif

Civil Aspects of International Child Abdu...

Complete Task
Delegate To
Send for Review

Review & Finalize Correspondence

Workflow : Inbound from Clifford Chance Law Firm

Owner: Admin

Date: 18/09/2017 16:08

Type: Inbound

Priority: Low

Reference: IN-00045-0917

◀ 🏠 ◻

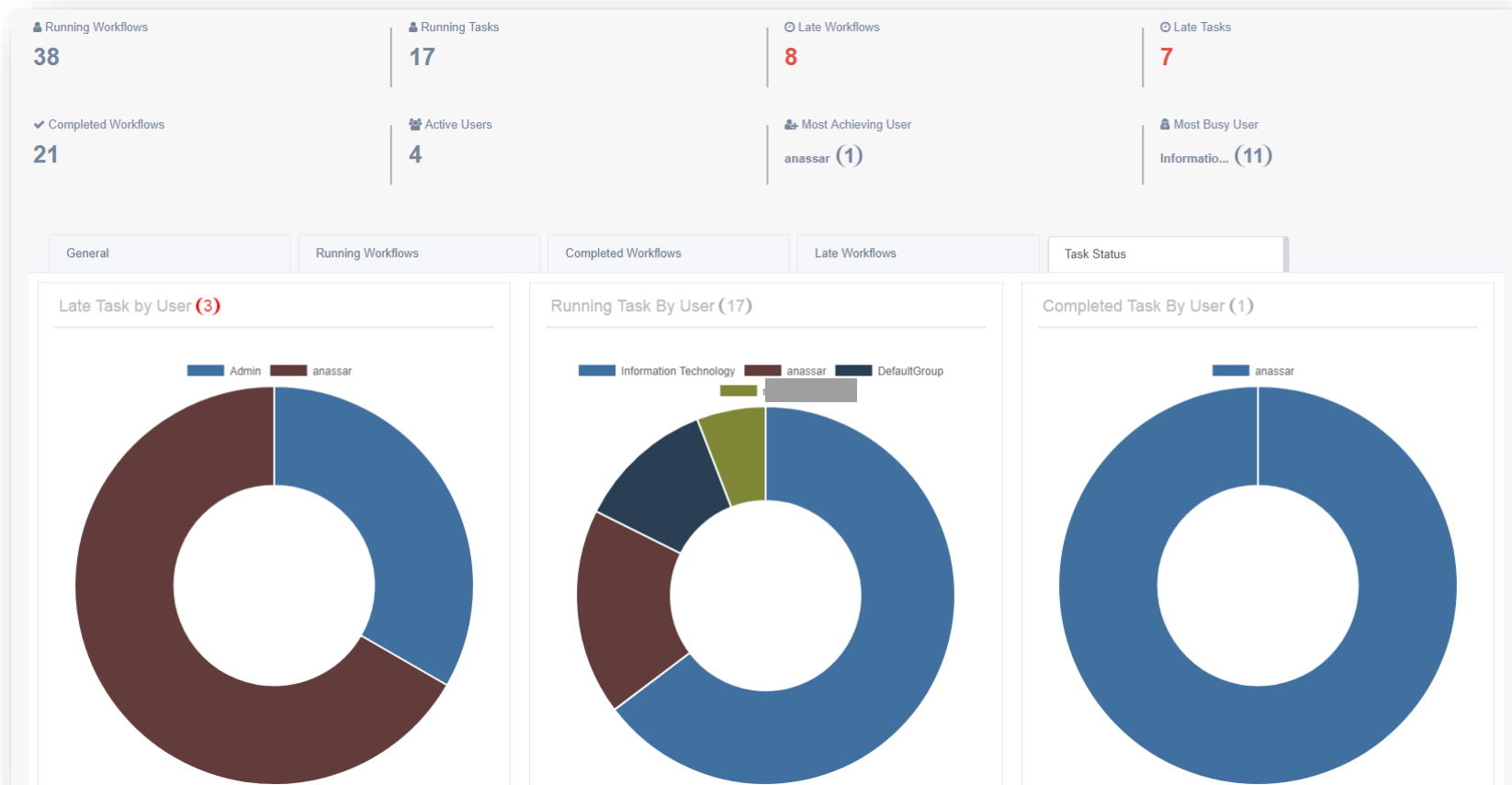
➤ Integrated Imaging

You can edit scanned content and add a variety of annotations; scan additional pages, re-organize pages, recognize content (OCR) and mark-up your document with shape annotations and rubber stamps.



➤ Embedded Analytics

Key Performance Indicators provide facts about running and completed work, late and executing assignments and you can compare results on the fly.



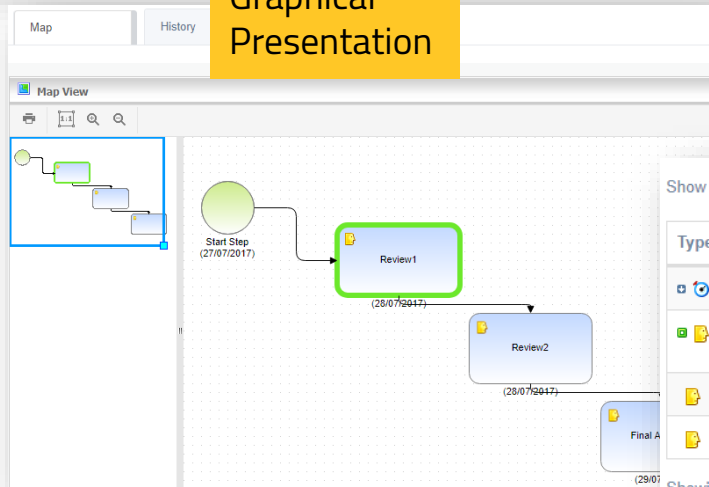
➤ Embedded Analytics – Interactive Dashboard

Graphical analysis of running workflows, completed workflows, late workflows, late tasks and others...

Task	Workflow	Date	Due Date
Approved Correspondence	Inbound from Alpha Telecoms	13/07/2017 12:34	
Approved Correspondence	Inbound from Alpha Telecoms - Approved Correspondence	13/07/2017 12:34	
Review1	Adhoc Workflow Contract Approval	18/07/2017 16:02	18/07/2017 17:02
Review1	Adhoc Workflow Confidential PO	27/07/2017 11:53	28/07/2017 12:53

Delay 236d00h45m

Graphical Presentation



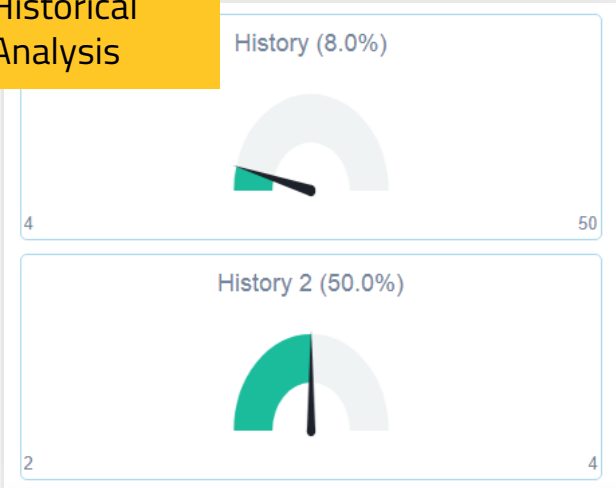
Tabular Presentation

Type	Step	Performer	Date Ready	Due Date	Completed Date	Reminder
Start Step	Start Step	Admin	27/07/2017 11:53	27/07/2017 11:53	27/07/2017 11:53	
Review1	Review1	anassar	27/07/2017 11:53	28/07/2017 12:53	Awaiting Completion	
Review2	Review2	Admin		28/07/2017 13:53	Awaiting Completion	
Final Approval	Final Approval	rbakkour		29/07/2017 13:53	Awaiting Completion	

Showing 1 to 4 of 4 entries

Previous 1 Next

Historical Analysis



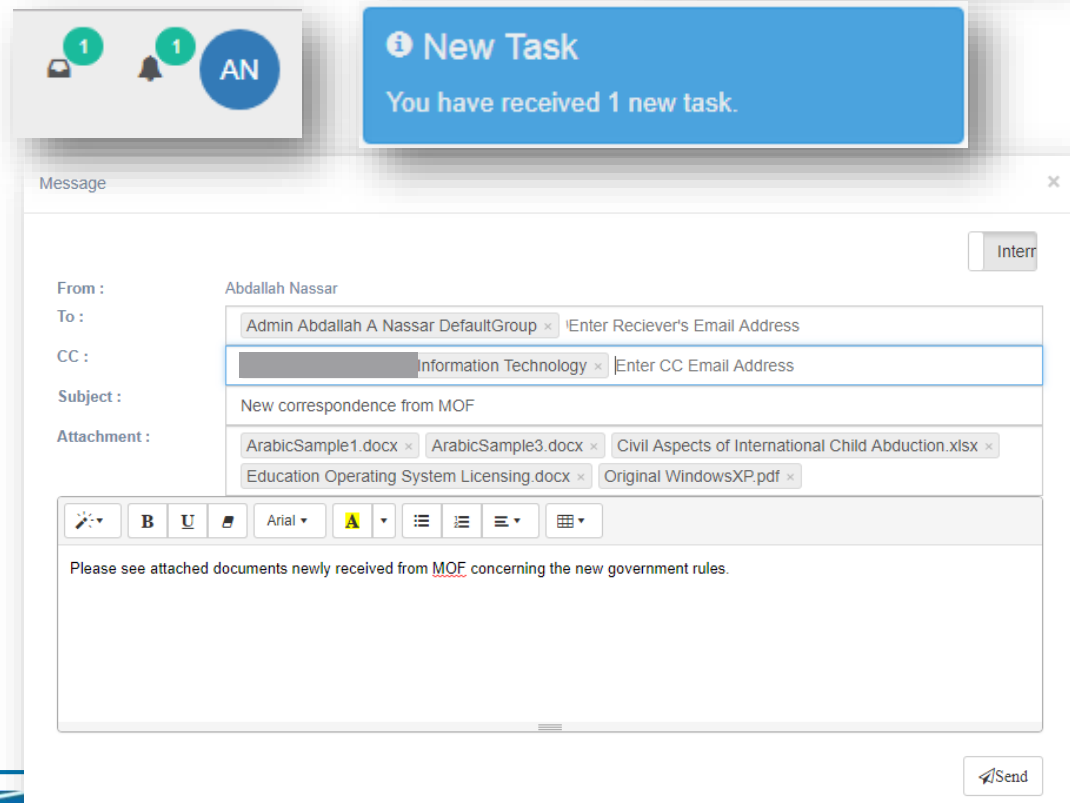
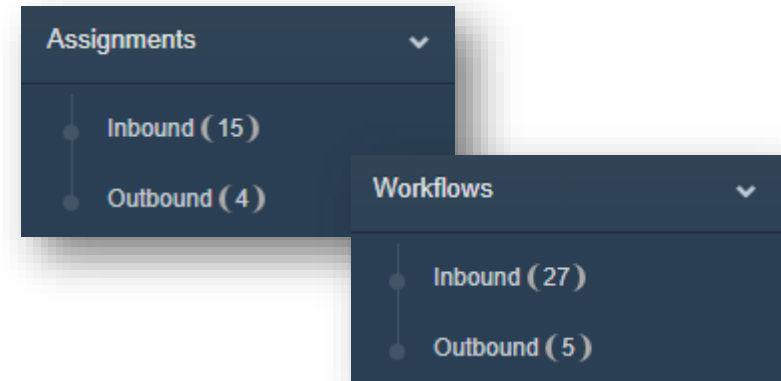
➤ Automatic Classification

The user assignments and managed workflows are automatically classified by their type whether Incoming, Outgoing, Memo, etc...

➤ Instant Notification

You will be instantly notified about new assignments coming to your inbox. You can also configure the inbox refresh rate to control when the new assignments will show in your interface.

- Sound notification upon receiving new assignments



➤ Dynamic Intake

Power users can design the workflow package and map using Content Server. Users will be able to consume the predefined configuration such as task dispositions, task permissions and assigned attributes and forms.

The screenshot displays the 'Inbound from Clifford Chance Law Firm' interface. On the left, a 'Work Item' sidebar includes options like Overview, General, Attachments, Comments, Attributes, Forms, Delegate to..., and Send for Review... Below this is a 'User List' window with a search bar and a table of users.

	Select	Name	First Name	Last Name	Department	Title	Email	Office	Contact
+	<input type="checkbox"/>	anassar	Abdallah	Nassar	Information Technology		anassar@enterprise	Beirut Central District	
+	<input type="checkbox"/>	hajjarieh	Hasan	Al Jarieh	Information Technology		hajjarieh@enterprise	Beirut Central District	
+	<input type="checkbox"/>								

The 'Attributes' panel shows fields for Package (checked), Reference (IN0000000014Normal-08), Correspondent (Clifford Chance Law Firm), Addressee (Admin), Distribute To (warning icon), and Copy To (warning icon). The 'Review & Distribute Correspondence' window shows a rich text editor with a toolbar (Bold, Underline, Arial, etc.) and a yellow callout box listing features: Type-ahead User Selection, HTML based Comment Editor, and Security on Attributes. At the bottom, there are buttons for Approve, Reject, Delegate To, and Send for Review, along with an 'Auto-Send Package' checkbox.

➤ UI Enhancements

Type-ahead for user fields. You can select users to distribute assignments with autocomplete preview as you type the name of the user. User can use preconfigured data filters to quickly retrieve their assignments.

Addressee

Distribute To

Copy To

Admin Abdallah A Nassar DefaultGroup x Addressee

Admin Abdallah A Nassar DefaultGroup x Information Technology x

Admin Abdallah A Nassar DefaultGroup x

Admin Abdallah A Nassar DefaultGroup x

Task	Workflow	Owner	Date
Confirm & Generate Reference	Outbound to Kuwait Petroleum International	Admin	23/08/2017 11:37
Confirm & Generate Reference	Outbound to	Admin	23/08/2017 11:46
Scan & Upload Documents	Correspondence for Assoufid	Admin	21/08/2017 14:47
Review1	Adhoc Workflow Confidential Inbound	Admin	13/08/2017 10:47
Review & Distribute Correspondence	Inbound from Clifford Chance Law Firm	Admin	08/08/2017 16:21
Review & Finalize Correspondence	Inbound from Alpha Telecoms	Admin	01/08/2017 22:25
Confirm & Generate Reference	Outbound to Ministry of Finance	Admin	24/07/2017 11:00
Review & Distribute Correspondence	Inbound from Ministry of Interior	Admin	19/07/2017 10:50
Task1	Adhoc Workflow Confidential PO	Admin	19/07/2017 10:57
Task3	Adhoc Workflow Confidential PO	Admin	19/07/2017 10:57
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>


- Data can be filtered based on any attribute
- Respects task configuration such as Max Rows and Field Type

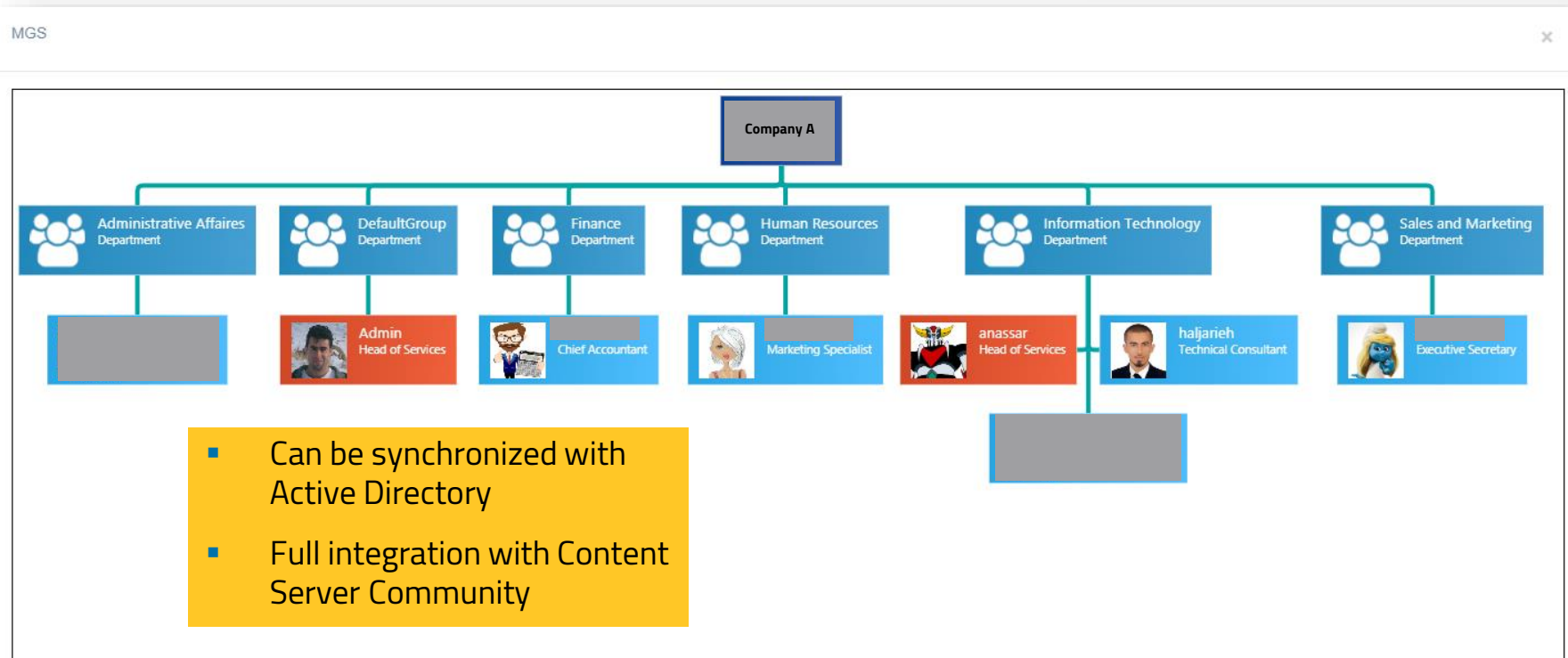


➤ UI Enhancements

You can browse your organization graphically. The organization chart introduces how your organized is structured and who is the leader of each department.

Admin

	Login Name	Admin
	Department	DefaultGroup
	First Name	Abdallah
	Middle Name	A
	Last Name	Nassar
	Title	Head of Services
	Email	admin@enterprise
	Phone	03586678
	Fax	009611974246
	Office Location	Beirut Central District



➤ Security Clearance

Based on granted privileges, you can select the security profile predefined by your organization. The Security Clearance replaces existing content security and grants custom access to groups.

Escalation Rules	Security Level (English)	Security Level (Arabic)	Trustees	Actions
Correspondent Management	Confidential	خصوصي	89543:R,1001:F	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
User Management	Normal	عادي	90973:R,89543:R,1001:F	
SmartWork Packages	Public	عام	90974:R,1001:F,90973:R,89543:R,90	
Global Items Localization	Restricted	محدد	89543:R,1001:F	
Reference Management	Secret	سري	89653:R,1001:F	
Security Management	Top Secret	سري جداً	1001:F	

Set Security ✕

Confidential

Normal

Public

Restricted

Secret

Top Secret

- Replace existing Security with a Single-Click
- Automate Security based on security level

➤ Dynamic Data and Data Filters

You can select the display layout based on your interest. The SmartView allows you to populate and filter specific data columns based on the workflow type.



Priority	Reference	Correspondent	Addressee
Urgent	432342432	Ministry of Interior	
Urgent	432342432	Ministry of Interior	
Normal	IN-000000011-Normal	Ministry of Interior	anassar Abdallah A Nassar Information Technology

- Global configuration for displayable columns
- Advanced search filters: Late, Follow-up, New

🚩 Review & Finalize Correspondence

➤ Flexible Reports

You can use a variety of prompts or filters before you run a report. The administrator can assign what reports you can run.

Documents Created By User ▾

Documents Created By User		
Type	Rows	Attribute Items
User: Field	1 (locked)	Which User?: ⚠ <input type="text"/> <input type="button" value="P..."/>
Date: Field	1 (1 max)	Created From: ⚠ <input type="text"/> <input type="text"/> <input type="text"/>
Date: Field	1 (locked)	Created Till: ⚠ <input type="text"/> <input type="text"/> <input type="text"/>
Text: MultiLine	1 (locked)	SQL: <pre>select Name from DTREE where CreatedBy = @Which User?/@ and CreateDate >= @Created From/@ and CreateDate <= @Created Till/@ and SubType=144</pre>

- More than 12 Input Prompts...
- Required Report filters
- Replacement tags such as @myself/@

Report ✕

Which User? ⚠

Created From ⚠

Created Till ⚠

August 2017

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2

➤ Relations

You can add/remove relations between correspondence. The relation allows to refer to an existing content or workflows during the execution of the assignment.

Administrative Affairs
ArabicSample1.docx
Civil Aspects of Int .xlsx
Finance
Human Resources
Inbound Documents
Information Technol

- View Document
- Download
- Information
- Open with Brava
- Set Security
- Delete
- Relate to Workflow**

Scan & Upload Documents - Correspondence

Attachments Relation Comments History Map Tracker Form

Show 10 entries

Type	Name	Create Date	Owner
	ArabicSample1.docx	11/07/2017 13:39	Admin Abdallah A Nassar Defau

Showing 1 to 1 of 1 entries

Relate to Workflow (aa-smartwork 1621838 Link)

1
Workflow Information
Workflow fields

2
Workflow Steps
Identify Workflow Steps

3
Attachments
Add Attachments

Attributes

- Type Internal
- Priority Normal
- Reference xxxx
- Correspondent XXXXXXXXXX
- From a
- العربية arabic

Attachments

- Scanned Document CMS
- My Contract - Abdallah Nassar

Map

Map ⚠

Next
Prev
Finish

- Copy attributes to new workflow
- Link documents to new workflow


➤ Physical Content Circulation

Correspondence may include a physical package. You can track the movement of the correspondence and print Delivery and Receipt reports.

Package Viewer

Barcode


Show entries Search:

↑↓	Date	↑↓	Performer	↑↓	Barcode	↑↓	Location	↑↓	Report	↑↓
↶	23/08/2017 14:05		Admin Abdallah A Nassar DefaultGroup		11-33342-A-4234-AB		Beirut Central District			
↷	23/08/2017 14:05		Admin Abdallah A Nassar							
↶	23/08/2017 14:05		Admin Abdallah A Nassar							

Showing 1 to 3 of 3 entries

Admin Abdallah A Nassar DefaultGroup
Beirut Central District

Date: 23/08/2017 14:08



11100215856

We have delivered the physical package to the authorized receiver who is now responsible of the package

➤ Physical Content Management

Correspondence may include a physical content that need to be stored in your organization warehouse.

Physical Item Employment Contract for Abdallah Nassar: IN-00098-1017

Home Location
HO...Head Office

Physical Item Type
Paper Document

Locator Type
FILE...File Box

Name
Services Contract with Abdallah Nassar

Create

Physical Item 111: IN-00098-1017

Facility
JED02...Jeddah Facility - Hiraa

Area
HIR001...Hiraa Road Building 001

Locator
0102030405
Search Locators

Offsite Storage ID
110

➤ Automatic Reference Generation

The solution can generate a unique reference for each instantiated workflow using pre-configured settings. Prefix and suffix can be added to the reference to make it more comprehensive.

Date	Workflow Attributes	Constants
Day – Month – Year @DateD/@ @DateM/@ @DateY/@	@AttributeName/@	Any alphanumeric constants

Prefix	ID Length	Suffix	Example
Q8-IN-	5	-@DateM/@ @DateY/@	Q8-IN-00017-0817
URC - @Project/@ - @ProjectID/@ - @Department/@ - @Document Type/@	3	-@DateM/@ @DateY/@	URC - ASW - 120 - FD - MOU015 - 0817

➤ Automatic Escalation

The system administrator can configure the automatic escalation rules. These include the idle time the system should wait before escalating late tasks and the tasks that should be escalated.




Map Name	Task Name	User Name
Inbound Map	Select...	Abdallah Nassar(anassar)
	Select...	
	Review & Finalize Correspondence	
	Review & Distribute Correspondence	
	Approved Correspondence	
	Rejected Correspondence	


Configure Escalation Schedule

Enable this Schedule	<input checked="" type="checkbox"/>
On These Days	<input checked="" type="checkbox"/> Sun <input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thu
At these hours:	A.M. <input checked="" type="checkbox"/> 12 <input checked="" type="checkbox"/> 01 <input checked="" type="checkbox"/> 02 <input checked="" type="checkbox"/> 03 <input checked="" type="checkbox"/> 04 <input checked="" type="checkbox"/> 05
	P.M. <input checked="" type="checkbox"/> 12 <input checked="" type="checkbox"/> 01 <input checked="" type="checkbox"/> 02 <input checked="" type="checkbox"/> 03 <input checked="" type="checkbox"/> 04 <input checked="" type="checkbox"/> 05
At these times:	<input checked="" type="checkbox"/> 00 <input checked="" type="checkbox"/> 05 <input checked="" type="checkbox"/> 10 <input checked="" type="checkbox"/> 15 <input checked="" type="checkbox"/> 20 <input checked="" type="checkbox"/> 25
Days to wait before escalation	<input type="text" value="1"/>
Action:	<input type="button" value="Save"/> <input type="button" value="Reset"/>

[Admin Home](#)

- Out of Office configuration by user



- Profile
- Settings
- Out of Office
- Logout 



➤ Ad-hoc Workflows

You can easily create your own workflows and decide the next assignees and due duration. You can design your workflows on the fly using Smart Wizard interface.

- Serial vs. Parallel steps
- Review & Delegate authorities
- Unlimited number of steps
- Dynamic Attributes definition

Smart Adhoc

1 Workflow Information
Workflow fields

2 Workflow Steps
Identify Workflow Steps

3 Attachments
Add Attachments

Name ▲ Confidential PO from MOF

DueDate 23/08/2017

Type ▲ Inbound

Priority ▲ Low

Reference 42423243

Correspondent ▲ Ministry of Finance ...

Correspondence Date ▲ 23/08/2017

Addressed To ▲ Admin Abdallah A Nassar DefaultGroup
Addressed To

Finish Next Prev

Smart Adhoc

1 Workflow Information
Workflow fields

2 Workflow Steps
Identify Workflow Steps

3 Attachments
Add Attachments

Task Title	Duration	Assign To	Link To	Review	Delegate
Task One	0 d 1 h	Admin Abdallah A N...	Start Step	On	Off
Task Two	1 d 0 h	Assign To	Task One	Off	On ✕
Task Three	1 d 1 h	hajariah Hasan Al Ja... Assign To	Task Two	On	On ✕

Add Task



Finish Next Prev


➤ Content Type Prerequisites


You can define document requirements for each workflow. You can configure the task that requires to validate that the needed documents are added to the workflow before moving to next tasks.

<Initiator> - Employee Settlement ✕

Missing Document List

 Employment Checklist
 Service Agreement

 Employment Contract

 Security Clearance

	Map Name	Content Types	Actions
Escalation Rules			
Correspondent Management			
User Management	aaaSmartleader	Employment Contract,Service Agreement,Security Clearance,Employment Checklist	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
SmartWork Packages	WFI 1.3 Purchase Order	3,2,1,Type1,Type2	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Global Items Localization			
Reference Management	<input type="text" value=""/> ...	<input type="button" value="Add Type"/>	<input type="button" value="Save"/>
Security Management			
Content Type Management			

➤ Content Server Integrations

Integrated with Enterprise Scan, Electronic Signature and Brava! You can use native features provided by the Content Server such as View as Web Page, Browsing Folders, Workflow Maps, Workflow Forms, Search Templates, Categories and more...

The screenshot displays a web application interface. On the left, a navigation pane shows 'Human Resources' with a 'Show 10 entries' dropdown. Below this is a table listing folders:

Type	Name
Folder icon	Benefits
Folder icon	Compensation
Folder icon	Employee Handbook
Folder icon	Employee Services
Folder icon	Payroll
Folder icon	Personnel Information
Folder icon	Recruiting
Folder icon	Staffing
Folder icon	Time and Attendance
Folder icon	Training and Education

At the bottom of the list, it says 'Showing 1 to 10 of 10 entries'.

On the right, a 'Smart Search' dialog box is open. It contains the following fields:

- Full Text:** A text input field containing 'Incoming from MOF*'.
- Name:** A text input field containing 'FullText'.
- Category:** A section with several fields:
 - Type:** A dropdown menu set to 'Inbound'.
 - Reference:** A text input field containing 'Reference'.
 - Correspondence Date:** A text input field containing '16/08/2017'.
 - Correspondent:** A text input field containing 'MGS' and a '...' button.
 - Priority:** A dropdown menu set to 'Normal'.

A 'Submit' button is located at the bottom right of the dialog box.

➤ Dual Language

You can use English or Arabic interface. You can default the language you prefer to use and it will accompany you on whatever device you may use.

The screenshot displays the SmartWork interface in Arabic. It features a file list with columns for 'الاسم' (Name) and 'التوع' (Type). A dialog box titled 'نظام الأمان' (Security System) is open, showing a list of security levels with 'سري جداً' (Very Secret) selected. A settings panel on the right is titled 'الإعدادات' (Settings) and includes a 'اللغة' (Language) section with 'عربي' (Arabic) selected. A yellow callout box at the bottom right contains the following text:

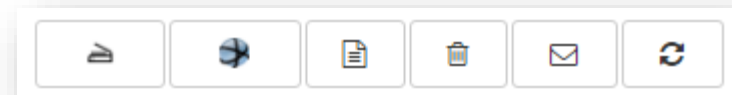
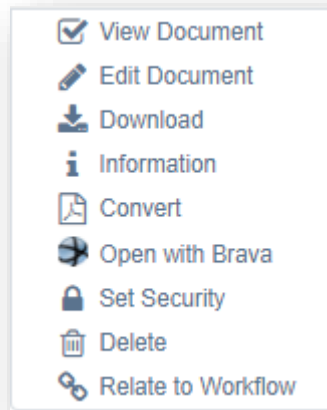
- Localized Metadata
- Additional Languages

➤ Users can scan and import (Drag & Drop) necessary documents to a running workflow. A built-in Viewer is available on the Attachments.

- Add-on (Annotate & Redact)
- Drag & Drop
- Mobility (Capture & Gallery)
- Email to Internal and External Recipients
- Convert to PDF

➤ Global Function Menu vs. Document Function Menu

- View document
- Edit document online
- Generate barcode
- Download document
- Read information
- Read history
- Convert to PDF (Word, PowerPoint)
- Open document with Brava! Plugin
- Set Security on a document
- Delete document
- Add relation to running workflow instances



- Scan new documents
 - Open documents with Brava! Plugin
 - Import new documents
 - Delete documents
 - Email Documents (internal users vs. external users)
- Respects attachment volume predefined permissions
 - Respects permissions assigned on document level

➤ Integration with MS Outlook

The screenshot displays the SmartWork application interface. The top menu bar includes 'FILE', 'SmartWork', 'HOME', and 'SEND / RECEIVE'. A sidebar on the left contains icons for 'Attach to Process' and 'Config SmartWork'. The main window is titled 'Assignments' and contains a table with the following data:

Task	Workflow	Owner	Date	Priority	Type	Reference
<Initiator>	aaaForm	Abdallah A. ...	12/4/2017...	Normal	Unclassified	
<Initiator>	test no attr...	Abdallah A. ...	12/6/2017...	Normal	Unclassified	
<Initiator>	test 01 no ...	DefaultGroup	12/6/2017...	Normal	Unclassified	
Anything2	aa-smartw...	Abdallah A. ...	8/22/2017...	Urgent	Unclassified	1234
Approve1						
review dele						
review dele						
review dele						
Task One						

An 'Attachments' window is overlaid on the bottom right, showing a table of attachments:

Name	Created By	Creation Date
aaaaImageDoc.TIF	Abdallah A. Nassar	5/29/2017 7:59:19 PM
Microsoft Outlook Test Message	Abdallah A. Nassar	2/26/2018 4:32:52 PM
My Contract - Abdallah Nassar	Abdallah A. Nassar	5/19/2017 4:01:57 PM

- Attach email messages directly to running workflows
- Verify other attachments related to running workflows
- Rename selected messages during upload

- Relation allows linking existing documents to running workflows and vice versa. It helps to prevent Content Duplication across the repository.

review delegate - aa-smartwork 1621838 Link x

Attachments | Relation | Comments | History | Map | Tracker | Form

Show 10 entries Search:

↕	Type ↕	Name ↕	Create Date ↕	Owner ↕	Location ↕	Relation Type ↕
<input type="checkbox"/>		_mapleleaf_feedback.jpg	07/01/2005 12:31	Admin Abdallah A Nassar DefaultGroup	Enterprise:Instructor Aids:Instructor Forms - Roster, Course Evaluation:_mapleleaf_feedback.jpg	Direct
<input checked="" type="checkbox"/>		1. Intro.doc	22/02/2002	Admin Abdallah A Nassar DefaultGroup	Enterprise:Customer Service:Customer Feedback Folder:Ergoboots folder:Ergoboots:1. Intro.doc	Direct
<input type="checkbox"/>		deutch	17	Admin Abdallah A Nassar DefaultGroup	Enterprise:deutch	Direct
<input type="checkbox"/>		deutch -10x-Content Serv	14	Admin Abdallah A Nassar DefaultGroup	deutch person home:deutch -10x-00 - OpenText Content Serv	Indirect
<input type="checkbox"/>		matrix.doc	31/01/2001 14:32	Admin Abdallah A Nassar DefaultGroup	Enterprise:Course Material:240 Customizing the User Interface:Search Sample Docs for CCSUI:matrix.doc	Direct

Showing 1 to 5 of 5 entries

- Function Menu
- Folder Navigation
- Direct vs. Indirect Relation Types

Previous 1 Next

✓

- Comments are suggestions and/or remarks added by Workflow participants. They are Collaborative instructions that can be appended to the workflow while performing tasks.

Review & Distribute Correspondence - Inbound from Ministry of Interior

Attachments Relation **Comments** History Map Tracker Form

Show 10 entries Search:

Type	Step	Performer	Date	Comment
	Start Step	Admin	19/07/2017 10:08	
	Review & Finalize Correspondence	Admin	19/07/2017 10:50	i did all the needed actions

Showing 1 to 2 of 2 entries

Previous 1 Next

Comments can be secured on task level

- The History is a Comprehensive presentation of the Workflow Definition. It shows specific details about tasks, their Types, Start and Completion dates and their orders.

Review & Distribute Correspondence - Inbound from Clifford Chance Law Firm

Attachments Relation Comments History Map Tracker Form

Show 10 entries Search:

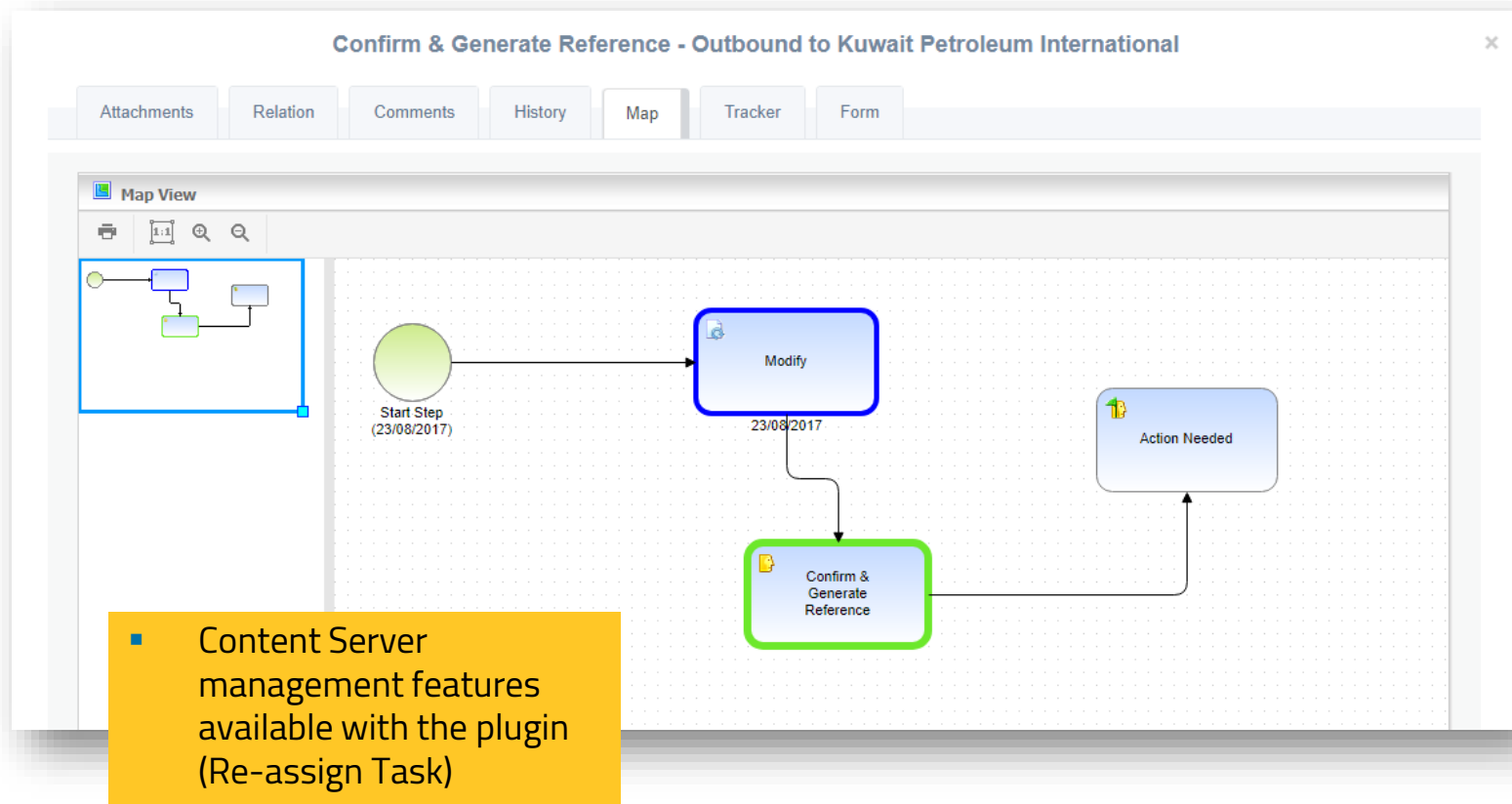
Type	Step	Performer	Date Ready	Due Date	Completed Date	Reminder
	Start Step	Admin	08/08/2017 16:21	08/08/2017 16:21	08/08/2017 16:21	
	Review & Finalize Correspondence	Admin	08/08/2017 16:21		08/08/2017 16:21	
	Synchronize Attributes		08/08/2017 16:21		08/08/2017 16:21	
	Review & Distribute Correspondence	Admin	08/08/2017 16:21		Awaiting Completion	
	Evaluate				Awaiting Completion	
	Approved Correspondence				Awaiting Completion	
	Rejected Correspondence				Awaiting Completion	

Showing 1 to 7 of 7 entries

Previous 1 Next

- Ability to send Email Reminder for executing tasks
- Discoverable by authorized people

- Map allows users to visually track the workflow through its lifecycle. Tasks being Executed show in GREEN while Completed Tasks show in BLUE.



- The Tracker logs all activities related to a Workflow such as Approval, Rejection, Delegation, Review, Reminder, etc... It also logs the time elapsed to execute each activity.

Action Needed - Outbound to Ministry of Health

Attachments Relation Comments History Map Tracker Form

Show 10 entries Search:

Task	Action	Performer	Date Ready	Completed Date	Time Elapsed
Confirm & Generate Reference	Send On	Admin Abdallah A Nassar DefaultGroup	05/07/2017 19:33	05/07/2017 19:43	00:09
Reminder for the task "Action Needed"	Email Reminder	Admin Abdallah A Nassar DefaultGroup	07/08/2017 14:59	07/08/2017 14:59	
Reminder for the task "Action Needed"	Email Reminder	Admin Abdallah A Nassar DefaultGroup	08/08/2017 16:01	08/08/2017 16:01	
Reminder for the task "Action Needed"	Email Reminder	Admin Abdallah A Nassar DefaultGroup	08/08/2017 16:01	08/08/2017 16:01	
Action Needed	Email Reminder	Admin Abdallah A Nassar DefaultGroup	12/07/2017 15:34	12/07/2017 15:34	

Showing 1 to 5 of 5 entries

Previous 1 Next

- Customizable Electronic Forms are accessible to Task assignees. HTML Views can be designed as required.

Review & Finalize Correspondence - Inbound from Clifford Chance Law Firm

Attachments Relation Comments History Map Tracker Form

Type: ⚠ Inbound

Priority: ⚠ Low

Security Level: ⚠ Normal

Correspondent: ⚠ Clifford Chance Law Firm

Addressee: ⚠ anassar

Received Date: ⚠ 17 September 201 4 P

Package:

Package Type: Booklet




Package Condition: Damaged

External Reference No: ⚠

Attachments:

Apply ↗ Reset ↻

- Workflows are accessible to Managers and Initiators. Both can manage and monitor the workflows from Initiation to Archiving stages.

Workflow	Owner	Start Date	Due Date	Time Elapsed	Status
 Correspondence for Aswar	Admin Abdallah A Nassar DefaultGroup	23/08/2017 13:12	No Due Date	0d:01h:055m	OK
Action Suspend Stop					
 Outbound to	Admin Abdallah A Nassar DefaultGroup	23/08/2017 11:46	No Due Date	0d:03h:021m	OK
 Outbound to Kuwait Petroleum International	Admin Abdallah A Nassar DefaultGroup	23/08/2017 11:37	No Due Date	0d:03h:030m	OK
 Correspondence for Assoufid	Admin Abdallah A Nassar DefaultGroup	21/08/2017 14:47	No Due Date	2d:00h:020m	OK
 Adhoc Workflow Confidential Inbound	Admin Abdallah A Nassar DefaultGroup	13/08/2017 10:47	14/08/2017 00:00	10d:04h:021m	Suspended
Action Resume Stop					
 Inbound from Kuwait Petroleum International	Admin Abdallah A Nassar DefaultGroup	13/08/2017 10:24	No Due Date		Completed
Action Archive Delete					
 Inbound from Clifford Chance Law Firm	Admin Abdallah A Nassar DefaultGroup	08/08/2017 16:21	No Due Date	14d:22h:047m	OK
 Inbound from Alpha Telecoms	Admin Abdallah A Nassar DefaultGroup	01/08/2017 22:25	No Due Date	21d:16h:043m	OK
 Adhoc Workflow Confidential PO	Admin Abdallah A Nassar DefaultGroup	27/07/2017 11:53	31/07/2017 00:00	27d:03h:015m	Workflow Late

- Document Distribution through Internal Notification Center
- Selection of Correspondent using Attribute Lookup
- Connect to existing Correspondent Database using Secure Database Lookups

Correspondent List

Show 10 entries Search:

Code	Correspondent	Contact	Title	Email	Mobile	Telephone
					00966-5-04241241	00966-5-04241241
					00966-5-04241241	00966-5-04241241
					00966-5-04241241	00966-5-04241241

Showing 1 to 3 of 3 entries Previous 1 Next

Edit Lookup: swCorrespondent


Web Form Database Connection:

SQL statement to execute:

```
select Code, Correspondent, ContactName as 'Contact', ContactTitle as 'Title', ContactEmail, ContactMobile as 'Mobile', ContactTelephone as 'Telephone' from SmartCorrespondent
```

Filter Output Based On Permissions:

➤ Restricted Access to Content Server System Administrators.

 Management Studio

	User	Department	Language	Enabled	Default View	Inbox Refresh Rate	Auto-Send Package	Access KPI	Actions
User Management	Abdallah Nassar(anassar)	Information Technology	English	<input checked="" type="checkbox"/>	Default	300	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
SmartWork Packages		Sales and Marketing	English	<input checked="" type="checkbox"/>	Smart	2700	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

	Item	English	Arabic
Escalation Rules			
Correspondent Management	Delegate	Delegate	تفويض
User Management	DeliveryReport	We have delivered the physical package to the authorized receiver who is now responsible of the package	لقد تم تسليم المعاملة للشخص المفوض اذناه وهو الآن مسؤول عن كامل المعاملة الورقية
SmartWork Packages	Inbound	{'Type','Priority','Reference','Correspondent','Addressee','External Reference No','Subject'}	نوع، أولوية، مرجع، المرسل، موجهة، إلى، المرجع الخارجي، الموضوع
Global Items Localization	Outbound	{'Type','Priority','Reference','Addressee','Shipped By'}	نوع، أولوية، مرجع، المرسل، إليه، طريقة الشحن
Reference Management	ReceiptReport	We have received the physical package and it is now under our	لقد استلمنا المعاملة كاملة وأصبحت
Security Management			

	Map Name	Task Name	User Name	Disabled
Escalation Rules	Inbound Map	Review & Finalize Correspondence ...	Abdallah Nassar(anassar)	<input type="checkbox"/>
Correspondent Management				
User Management				
SmartWork Packages				
Global Items Localization				
Reference Management				
Security Management				

➤ Control of User Provided Features

The long date format that is used by the whole module

Long Date Format

The short date format that is used by the whole module

Short Date Format

The date format that is produced by the Calendar control...

JS Fix Date Format

The accepted date format is used to populate Date Popup attributes...

Popup Date Format

The SQL database accepted date format is used for reports...

SQL Date Format

The Correspondent database lookup name that is used to connect SmartWork to local or external datasource...

Correspondent Secure Database Lookup

The format for electronically generated barcode...

Barcode Symbolism

Barcode Font Name

Barcode Font Size

Barcode Bar Height

Barcode Bar Width

Barcode Checksum

Barcode X Offset

Barcode Y Offset

Microsoft Office document types that can be converted to PDF...

Convert Document Types

The Drag & Drop feature can reject to upload a file which extension is not declared...

Drag & Drop Supported Document Types

- Drag & Drop restrictions
- Barcode Settings
- User Display options
- Assignments Display Control
- Recursive Relations
- Notification Control



Help

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SmartWork® User Guide

[Managing your Inbox /](#) ^ < >

Searching your Inbox

There are several ways to search data in your Inbox:

Global Search

The global search allows you to search your Inbox for any data that is displayed in the table. The search result is automatically filtered as you type in the search field. If you are using a Barcode Reader, you can use this search technique to search for your assignment that has a unique Reference.

Search:

Column Search

The column search allows you to search your inbox data that is available in the column. You can search data in different columns. In this case, the search result is filtered to match all the search columns criteria i.e. column1 & column2