ITEC

Image Technologies

User Manual

DOCUTRAK 3.5

Version 3.1.3

Contents

About DocuTRAK 3

DocuTRAK3.5 is an enterprise solution that provides innovative functionalities with comprehensive Records Registration, Case Tracking, and Document Broadcasting capabilities. This solution enables end-users to collaborate efficiently and effectively in tracking, distributing, assigning responsibilities and defining accountabilities for all corporate documentation system.

Document Purpose

The purpose of this document is to mention and describe all DocuTRAK3.5 modules, features, functions, capabilities, and step-by-step procedures for system access and use.

Glossary Of Technical Shortcuts Used In The Manual

Shortcut	Stands For
DT3	DocuTrak3
BC	Broadcast
CCC	Conditional Carbon Copy
WF	Workflow
ACL	Access Control List
OS	Organization Structure
DMS	Document Management System

1. Login

This page provides a security mechanism that prevents unauthorized users from accessing the system. The Login Page allows the end-users to login into the system by doing the following:

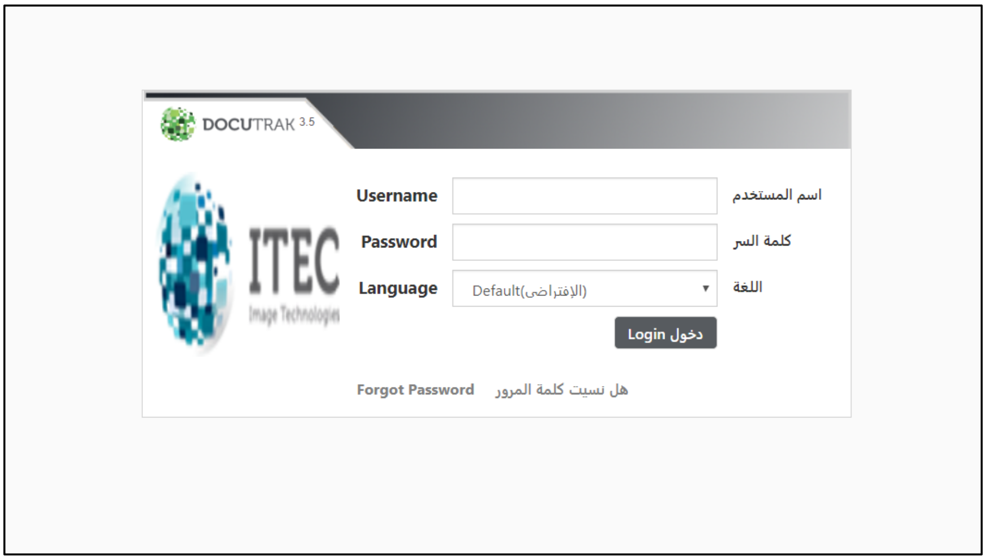


FIGURE 1: LOGIN PAGE

1. Enter **Username** in the "Username" field.
2. Enter **Password** in the "Password" field.
3. Select the desired display language from the "Language" list.
4. Click on the "Login" button (Login دخول).

→ If the login credentials are correct, the user will log-in into the system successfully.

If you forgot your password, you can click on Forgot Password هل نسيت كلمة المرور, the system will send an email to reset your password.

forgot your password

In case the end-user forgot his password, instead of contacting the administrator in order to reset him the password, this feature will help the end-user to reset it by his own, by doing the following:

1- Click on “Forgot Password” label in the login page.

Figure 2: login page – Forgot Password

2- The following dialog will pop-up, you will enter their email address then press “**Send**”.

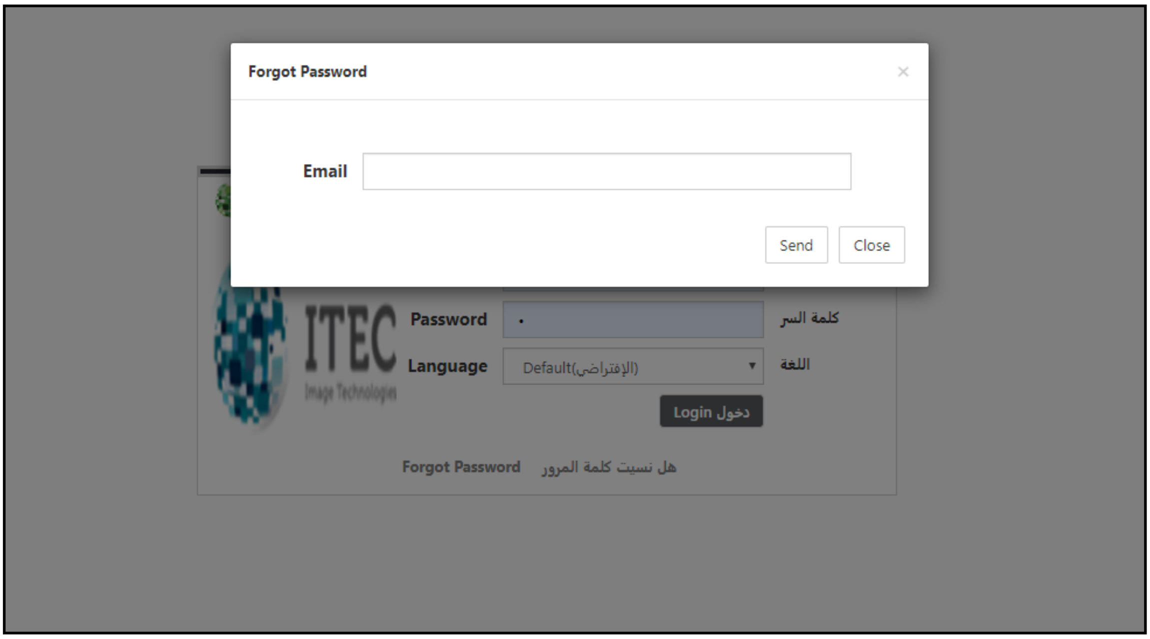


Figure 3: Forgot Password – Email address

3- A link will be sent to your email, opening the link will show the following reset password page:

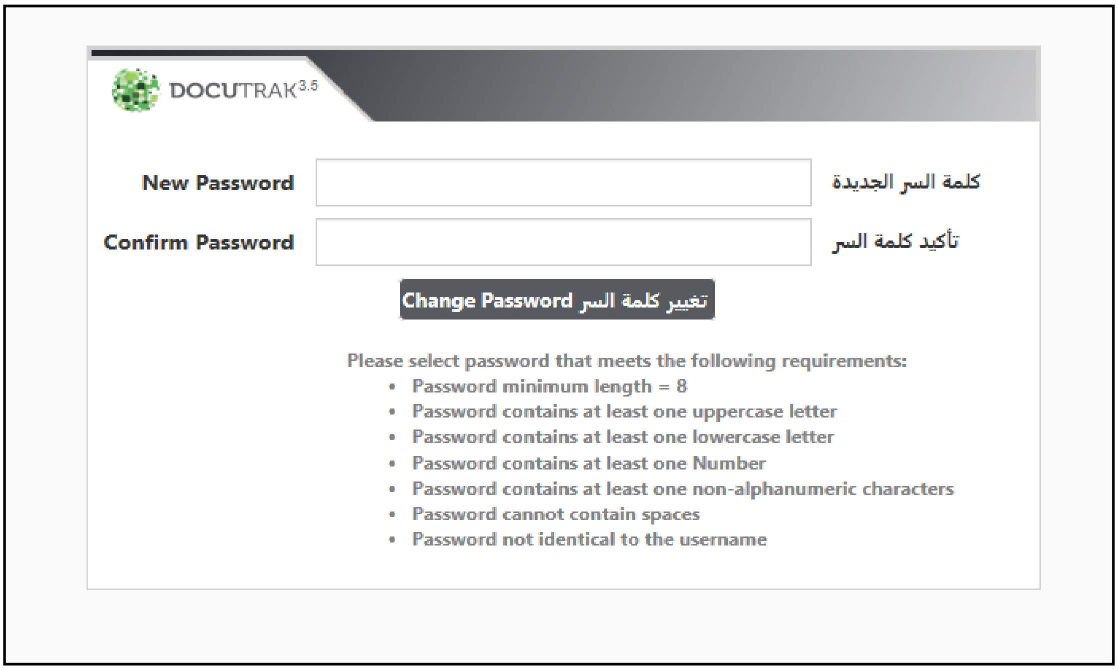


FIGURE 4: FORGOT PASSWORD – NEW PASSWORD

4- fill both fields with the new password with taking consideration of the password requirements same as the above figure.

Nodes Selection Page

After logging in, if the user is assigned to more than one node, the below **Nodes Selection** page will open, displaying all the assigned nodes for that user.

Each type of nodes has a special icon to distinguish it from other types:

- **active nodes** will be shown with a normal user icon.
- **shared nodes** will be shown with a three user's icon.
- **inactive nodes** will be shown with "X' sign beside the user icon.

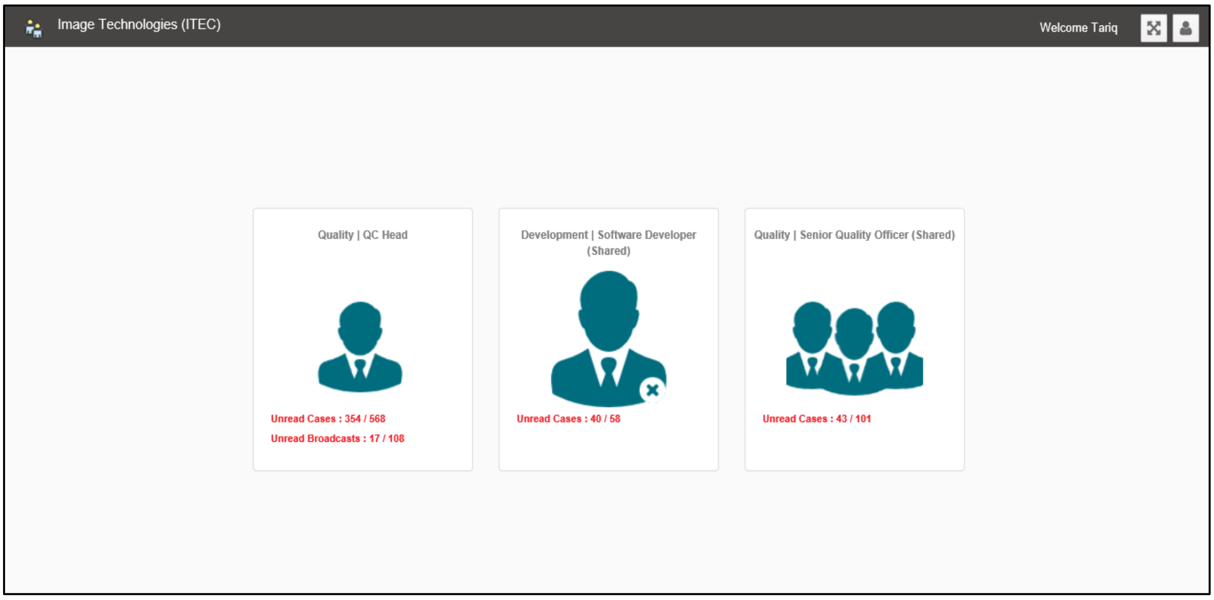


FIGURE 5: NODES PAGE

- The header contains the company name, logo, full screen button, and logout button.
- Each node contains the number of unread cases out of the total cases number, and the number of unread BC cases out of total number of all BC cases (if the node has BC privilege).

Dashboard

After logging in and selecting a node from nodes selection page or if the user is assigned to one node only, the following **Dashboard** page will be displayed, contains the all privileged modules for this node with statistics for each one.

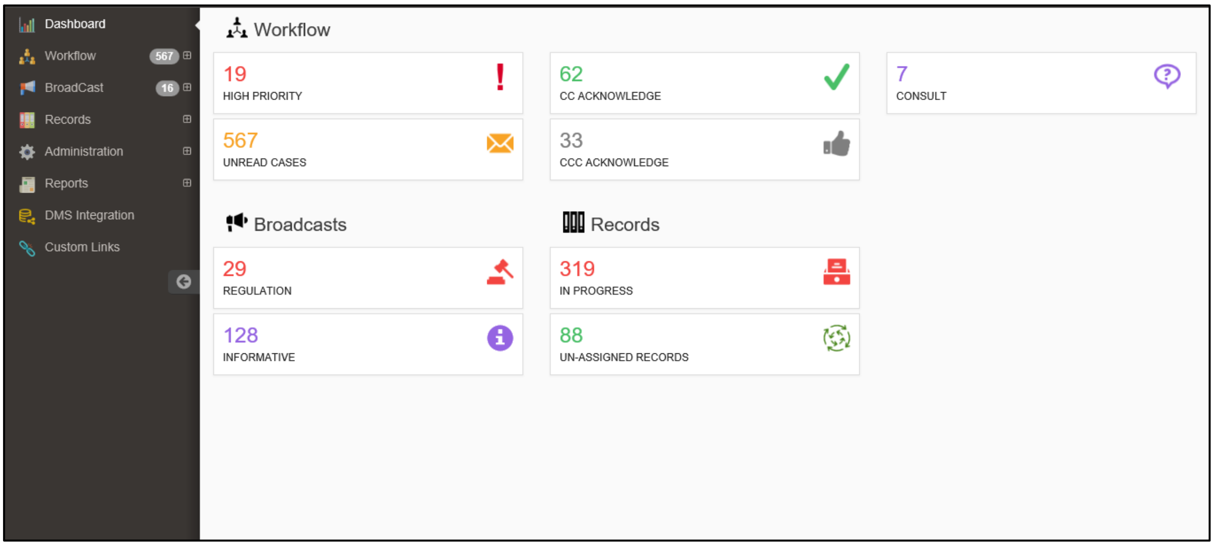


Figure 6: Dashboard

1. **Workflow section:**
   This section contains the following items:
   a. High Priority Cases: Displays the number of high priority cases of all privileged WF types. (This includes read and unread cases).
   b. Unread Cases: Displays the number of all unread cases of all privileged WF types.
   c. CC Acknowledge: Displays the number of cases that require CC acknowledgment.
   d. CCC Acknowledge: Displays the number of cases that require CCC acknowledgment.
   e. Consult: Displays the number of cases of type Consult.

Note: Clicking on the above will direct the user to the related cases he has privilege on without any filtration.

2. **Broadcast section:**
   This section contains the following items:
   a. Regulation: Displays the number of “Regulation” BC cases of all privileged BC types.
   b. Informative: Displays the number of “Informative” BC cases of all privileged BC types.

Note: Clicking on the above will direct the user to the related broadcasts without any filtration.

3. **Records section:**
   This section contains the following items:
   a. InProgress: Displays the total number of” InProgress” records of all privileged record types.

b. Un-assigned records: Displays the total number of the registered records that have not been sent to workflow for all records types.

Note: Clicking on (InProgress, Un-assigned records) will direct the user to the first record type he has privilege on without any filtration.

Workflows

DocuTRAK workflow module simulates the organization processes on managing and dealing with workflows (cases), and follow-up on the workflows while maintaining information on each transaction.

1. **Workflow Module** is used by the privileged DocuTRAK users (as defined in ACL by admin).
2. The **Workflow Case** is a process that contains a set of steps. Each workflow case has a unique case reference.
3. The **Workflow Job** is a step within the workflow case. The workflow jobs are:
    a. Initiate
    b. Consult
    c. Assign
    d. De-Assign
    e. Reply
    f. Reply to all
    g. Forward
    h. Recall
    i. Acknowledge
    j. Complete
    k. Re-open
4. The **Routing** of the workflow is divided to:
    a. Single Routing: the workflow will be sent ONLY to one recipient at a time. This can be done by:
        - Initiating a new workflow case.
        - Assign.
        - Reply, Reply to all, Forward.
        - Acknowledge.

    There is an exception on the single routing as it can be used as a parallel routing if you specify recipients in "CC" or "CCC", knowing that the "To" recipient can NOT take an action on workflow case until the all "CCC" recipients acknowledge the case.

    b. Parallel Routing: the workflow can be sent to more than one user at a time.
    Parallel routing types are:
        - Consult: The workflow is sent to all the users specified in the "To" field.
        - Committee: The workflow is sent to a committee of users.
          - The committee head is specified in the "To" field while the committee members are specified in the "CCC" field.
          - The committee head can use the workflow case actions (reply/reply to all/forward/complete) only when all committee members acknowledge the case.
5. You can initiate a new workflow case by defining the below:
    a. Recipients: To, CC, CCC.
    b. Case Details: Workflow Type, Subject, Category, Priority, Case Due Date, job due date and case owner.
    c. Custom Fields: Each workflow type includes custom fields that differ from one workflow type to another according to the settings defined by the administrator.
    d. Comments:

- General Comments: all the workflow recipients will see the general comments.
- Restricted Comments: Only the “TO” recipients can see the restricted comments.

e. Attachments: You can attach documents from different sources (System File, DMS, Cases “Records/Workflows”, Scan, and Templates)

6. Once the privileged users initiate a new workflow case of a certain type, the system will:
   a. Transfer all the attachments (except linked objects) of the initiated workflow case to Docuware or SharePoint according to the integration settings defined in the DMS Integration module.
   b. Save the metadata of the initiated workflow case to Docuware according to the integration settings.
7. The workflow **Inbox**: A set of workflow jobs sent to the user’s node from different nodes and still require his/her action. There are two types of Inbox in DocuTRAK:
   a. **Single Inbox**: The logged-in node has its own inbox. (See the description of the single node below “point 14 – a”).
   b. **Shared Inbox**: The same inbox is shared between all users within the shared node. (See the description of the shared node below “point 14 – b”).
8. Once you selected a workflow job from inbox or subordinates sub tab, the system will display its attachments in the attachments pool. If no attachments are available for the selected workflow job, then the pool will be displayed as empty with a text that says: “No attachment to display”.
9. The Workflow **Completed** sub tab: A set of workflow cases that you sent (consulted/ replied/ forwarded/ acknowledged, assigned, signed, recalled or replied on consult) out from your inbox to other nodes. Your completed sub tab will also display the workflow cases set as “Completed”.
10. The **Assigned** sub tab: A set of workflow cases that you assigned from your inbox to others. When you assign a workflow case, is will be assigned with your privileges on that workflow case.
11. The **Subordinates** sub tab: A set of workflow cases that are currently available in the inboxes of your subordinates. Subordinate cases completed by the supervisor will be displayed in both supervisor and subordinate completed sub tabs.
12. The **Monitor** sub tab: a set of workflow cases that you’re set as a case owner of them where you can track the progress of these cases along with their status, also you can modify their due date and close them.
13. The **Drafts** sub tab: are the cases you saved as drafts during initiate in order to complete sending them later.
14. By default, you can **search** for:
    a. Your own cases (that are currently available at your inbox/completed sub tabs).
    b. The cases of your subordinates (cases that are currently available at the inboxes and completed sub tabs of your subordinates).
15. If you have the “Full Search” privilege for a certain workflow type, you will be able to search for all the workflow cases related to that workflow type.
16. Node types are:

   a. **Single node:** Includes one DocuTRAK user only. The single node has its own inbox (single inbox); each node will receive its own cases.
   b. **Shared node**: Includes more than one DocuTRAK user who shares the same inbox:
      - All users within the shared node will receive the same workflow cases in their inbox.
      - Once a user within the shared node opens a workflow case from inbox, it will be locked from other users in that node.
      - Once a user within the shared node sends the workflow case out from inbox to another recipient, it will be moved from the inbox of all the shared node users to their completed sub tabs.
17. The node consists of a combination of Department, Job Function, and Username.
18. DocuTRAK is a node-based system, meaning that DocuTRAK will:
    a. Display the data depending on the logged-in node, including (its Inbox cases, completed cases, assigned cases, Subordinates cases and owned cases).
    b. Use the privileges assigned to that specific node.
19. Privileged DocuTRAK user can perform the following actions: Initiate a new workflow case, view, open, consult, assign, auto-assign, de-assign, reply, reply to all, forward, acknowledge, recall, complete, re-open, send the workflow case to a workflow or a record, send customer alerts, and attach files to the workflow case.
20. Unread Workflow Jobs (in inbox sub tab/subordinates sub tab) will be highlighted as “Bold”.
21. Case Due Date is the date at which the workflow case will be overdue.
22. When an active workflow case (not completed yet) exceeds its due date, the system will highlight the case due date in a red color. by default, the Case Due Date will be: current date + default Case Due date (in days).

Initiating a Workflow

Initiate a workflow

1. You can initiate a new workflow case by specifying its related information, custom fields, and attachments (if it exists). You can select the workflow recipients from the address book.

2. Address book displays a list of:
   a. Your direct manager
   b. Nodes from the same level of the logged-in node,
   c. Subordinates nodes of the logged-in node.

3. You can select among five modes to view your Address Book as below:
   a. OS Tree (default value): Lists the organization structure as a tree list.
   b. OS: Views the contacts in an organizational structure, as defined by the administrator.
   c. Departments: Lists the contacts by their departments.
   d. General Recipient: Lists only the contacts defined by the DocuTRAK administrator to receive cases from all the employees in the organization. Meaning; the general recipient receives

cases from any sender even if not connected with the recipient through the organization structure.

e. Committees: Lists the contacts defined by the DocuTRAK administrator as committees.
f. Favorite List: Lists the contacts that you defined - in your user preferences - as favorite contacts.
g. Groups list: list of groups created by the system admin which you can use in assigning CC recipients instead of selecting them one by one.

4. You can insert only one node in the “TO” textbox unless you are initiating a consult.
5. You can insert more than one node in the CC textbox.
6. You can insert more than one node in the CCC textbox.
7. “To” recipient can make the following actions on the workflow case: Generate report, Consult, Assign, Reply, Reply to all, Forward, Complete, subcase, Send to (Record/Another Workflow Case), Send Customer Alert, and attach files.
8. The “To” recipient can only Reply/Reply to all/Forward/Complete a workflow when all the “CCC” recipients acknowledge the case.
9. The “To” recipient can Reply/Reply to all/Forward/Complete a workflow case even if no “CC” recipient acknowledged the case.
10. “CC” recipient can make the following actions on the workflow case: Generate report, Acknowledge, and Send to (Record/Another Workflow Case).
11. “CCC” recipient can make the following actions on the workflow case: Generate report, Acknowledge, Send to (Record/Another Workflow Case).
12. When you send the case to committee, the committee head will be the “To” recipient of the case, while the committee members will be the “CCC” recipients.
13. The committee head can make the following actions on the workflow case: Generate report, Consult, Reply, Reply to all, Forward, Send to (Record/Another Workflow Case), and Attach files.
14. Committee head can NOT Reply/Reply to all/Forward the workflow case until all the committee members acknowledge the case.
15. Committee member can make the following actions on the workflow case: Generate report, Acknowledge, Send to (Record/Another Workflow Case).
16. In case of initiating a consult, you can add more than one node in the “To” field to consult them about your case.
17. Consulted nodes (who received the consult) can make the following actions on the received consult: Generate Report, Consult, Reply, and Send to (Record/Another Workflow Case).
18. Consultant (who initiated the consult) can make actions on the workflow case even if the consulted nodes (who received the consult) didn’t reply on the consult.
19. If the consultant (who initiated the consult) "Reply/Reply to all/Forward" the case, the case will be removed from the inboxes of consulted nodes (who received the consult).
20. In case the "TO" recipient is involved in an active auto assign, then the case will be sent to the assigned node with all the recipients of the case: CC and CCC recipients, with the privileges of assigner node on that workflow case.
21. You can also add notes to self to any case you receive in your inbox.

3. How to use the screens

To initiate a workflow, follow the below steps:

1. Click the **Workflow** tab.
2. Click the **Initiate** sub tab to view the initiate page, it has 6 buttons at the top (Previous, Clear, Save Draft, Send, Next and Close) as shown below:

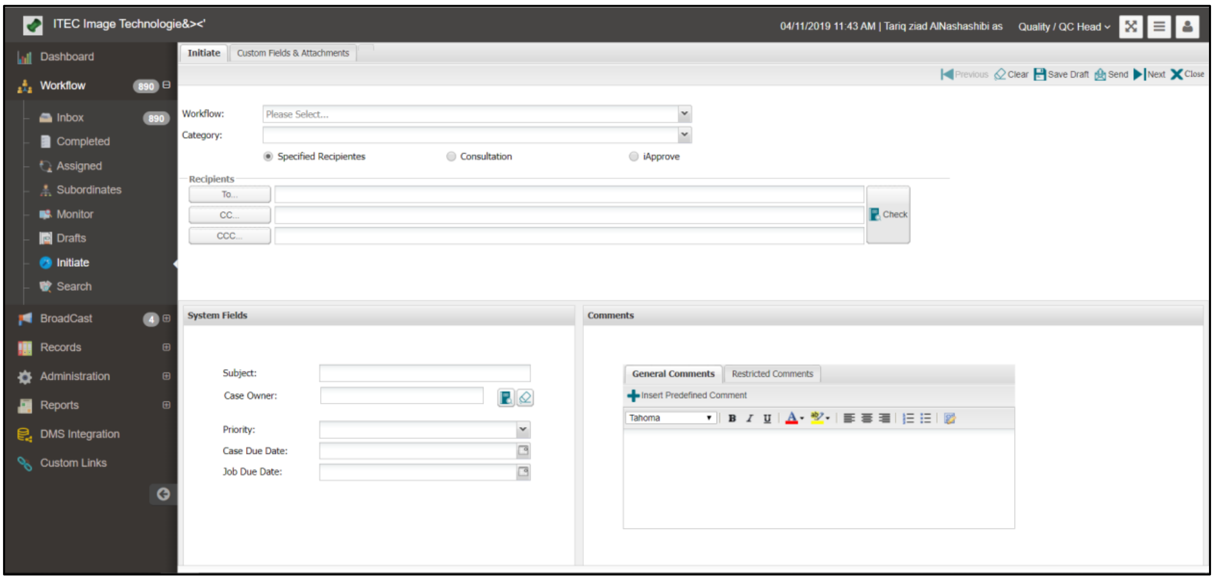


FIGURE 7: INITIATE WORKFLOW PAGE

• End-user will initiate a new workflow case by specifying its related information, custom fields, and attachments (if it exists).
• End-user will select the workflow type, category and recipients from the address book by Auto-Complete or Check names.

3.1.1.1. Selecting the Recipients of a Workflow Case

1. Click any of the following buttons To... , CC... , CCC... from the above figure to display the address book as shown below.

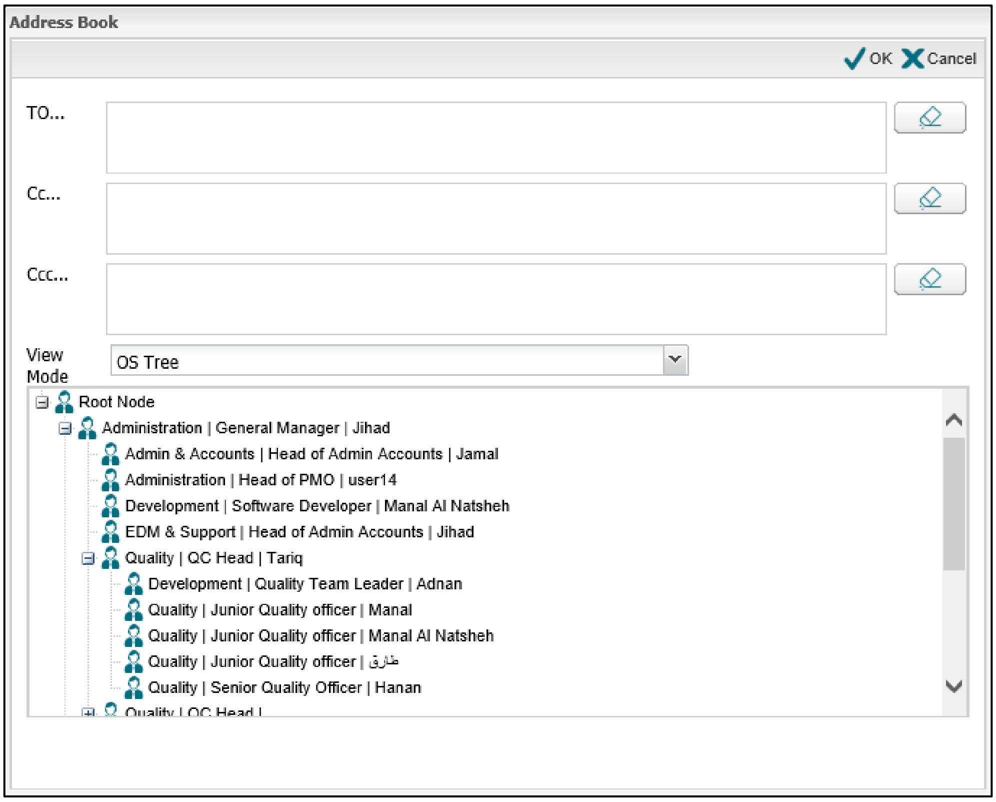


FIGURE 8: ADDRESS BOOK

2. The only expanded list would be your department. As displayed above.
3. You cannot write inside these textboxes by using the keyboard. The nodes will be inserted to these textboxes by selecting the required node from the list.
4. Place the cursor at "To…" field, then select the contact name that you want to send him the case.
5. Place the cursor at "CC..." field, then select the contact name that you want to send him a copy of the case.
6. Place the cursor at "CCC…" text field, then select the contact name that you want to send him a conditional copy.
   The clicked contact name will appear in the "CCC" text field. You can choose more than one "CCC" recipient. Remember that the user in the "To" recipient cannot take any action on the case until all "CCC" recipients acknowledged the received case.
7. Click OK button to accept the recipient(s) you have chosen or Cancel to cancel the operation.
8. You can delete any selected recipient by clicking on the button.

> **TIP:** If you have the option in your config file to use the text auto-complete feature, you will be able to write the required text inside "TO", "CC", and "CCC" in the initiate page, and the system will auto-complete it as you write.
> However, If you don't have the option in your config file, you can insert any part of the recipient's name in the recipients fields (To, CC, CCC) in the initiate page then click Check button displayed at figure 4 above; the "Check Names" popup will be displayed with all the

names that matches the inserted part, double click the chosen name to insert it in the selected recipient field.

3.1.1.2. Inserting the Case Details Values and Custom Fields

To insert the case information into the case's details and custom fields sections, follow these steps:

1. Fill the data in the Case Details and Custom Fields. Note that the custom fields will differ according to the selected workflow in the Case Details part.
2. You can change the default date in the "Case Due Date" field. The default value is defined by the administrator for the selected workflow type as follows:
   Current date + the default case due date period (in days) excluding the weekends.
3. Custom fields section:
   1. Custom fields tab: Displays all types of custom fields, except the Rich text type.
   2. The "Logged-in user's information" custom field: Includes the following options: (Department, Job Function, and Username).
      If "Logged-in user's information" custom field is assigned to workflow type when you create a new case, these fields will be populated with the logged-in node data and in read-only mode.
   3. Rich Text tab: Displays only the "Rich text" custom field, if the" Logged-in user's information" custom field is assigned to workflow type.

Note: You cannot assign more than one Rich Text Custom field to the same workflow type.

   4. The Rich Text custom field contains the following buttons:
      - Insert Predefined text template: Predefined Text templates added by the system administrator of a public type, or added by the user from the User Preferences, as a private type. The user can add any of these templates to the Rich Text custom field.

        Note: The system administrator can add templates of public and private types, but the user can only add private text templates.

      - View: Opens with the previously entered text where the user can edit the text and Save it**.** Only the "To" recipients can use this action. CC, CCC, and consulted nodes cannot change the Rich Text's content, but only can View the content.

        When the case is sent to its recipients, the "stored copies" will be shown to the recipients of the case in a versioning dropdown list. Each version will show the actions performed on the case. The actions are: Initiate, reply, reply to all, Forward, Consult, iApprove.

        Tracking privileged user can see all the versions of the Rich Text, while Non-Tracking privileged user can only view the last action with its content.

3.1.1.3. Adding attachments to a case

Attach system files, DMS files, linked objects (workflows/records), scanned documents, and templates using the "Attach File" button, the button expands a list once clicking on it, as shown below:

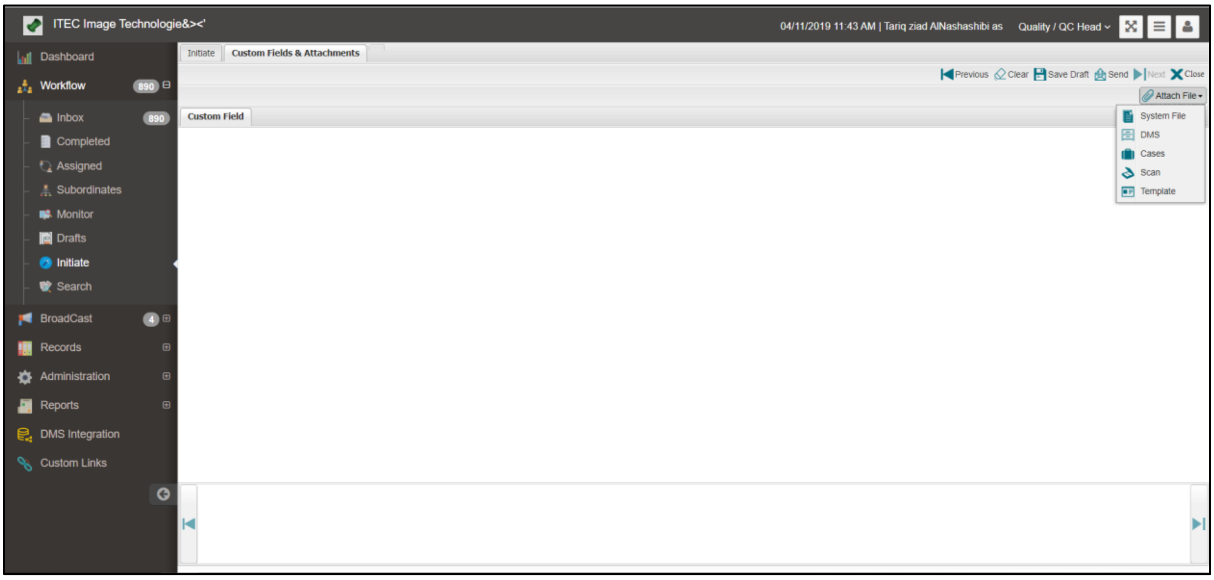


Figure 9: Attach File List

3.1.1.4. Attach system file

To attach documents to your case you can use "Attach from System File" button:

1. In "Initiate Workflow" page, click on "Attach File" button → "System File" option, The following pop up appears:

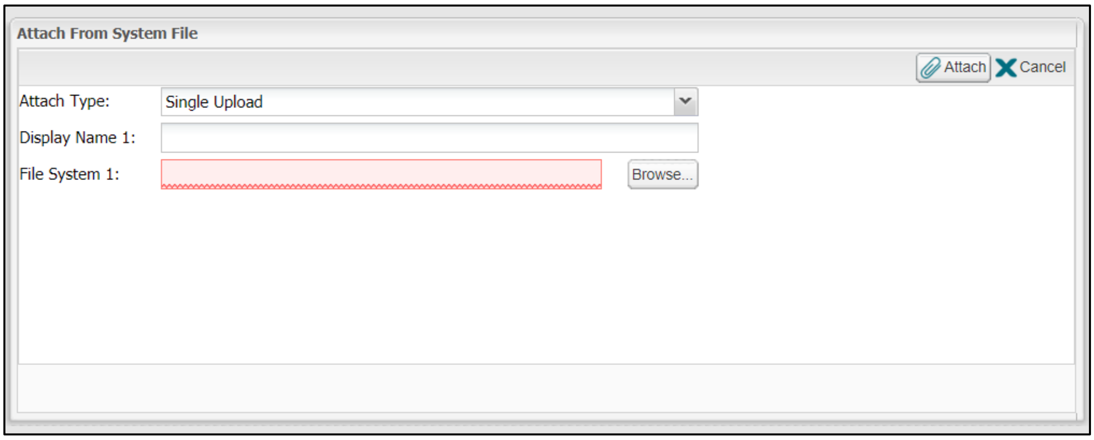


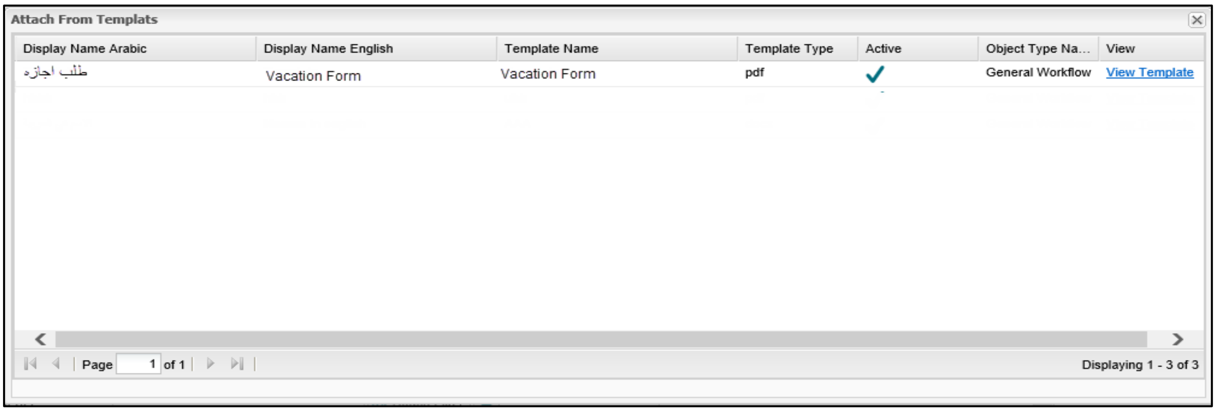
Figure 10: Attach from System Files popup

2. Choose the Attach Type either a [Single Upload] or [Multiple Upload] to upload more than one system file, you can upload up to three system files at once.
3. Write the desired name of the attachment(s) in the "Display name" field.
4. Choose the system file you want to attach by clicking on the Browse... button, navigation pop up will appear, navigate for the file you need then click on "ok" button to select it.
5. Click Attach button to upload the attachments or click Cancel button to close the attachment page.

3.1.1.5. Attach from templates

Templates are documents defined by the admin which can be downloaded by the user, updated and then re-attached gain to their case. To attach a template to your case you can use "Attach from Templates" button:

1. In "Initiate Workflow" page, click on "Attach File" button → “Template” option,
   The following pop up appears:



Attach From Templats

Display Name Arabic	Display Name English	Template Name	Template Type	Active	Object Type Na...	View
طلب اجازه	Vacation Form	Vacation Form	pdf	✓	General Workflow	View Template

Page 1 of 1 | Displaying 1 - 3 of 3

FIGURE 11: ATTACH TEMPLATES POPUP

2. Click on the View Template link button to open the template.
   You can save the template locally and update it as needed, then re-attach it as a system file.
   You can use button to close the pop-up.

3.1.1.6. Attach from DMS

To attach documents from DMS system, use "Attach from DMS" button:

1. In "Initiate Workflow" page, click "Attach File" button → "DMS" option,
   The following popup appears:

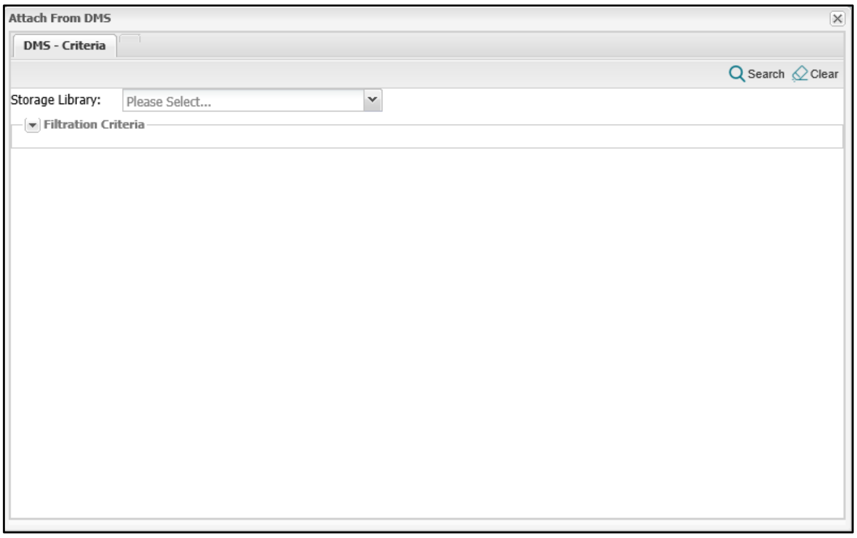


FIGURE 12: ATTACH FROM DMS

2. Select the Storage Library you want to attach your document from, authentication information will be required.
3. The related Filtration Criteria of the storage library will appear as it's shown below:

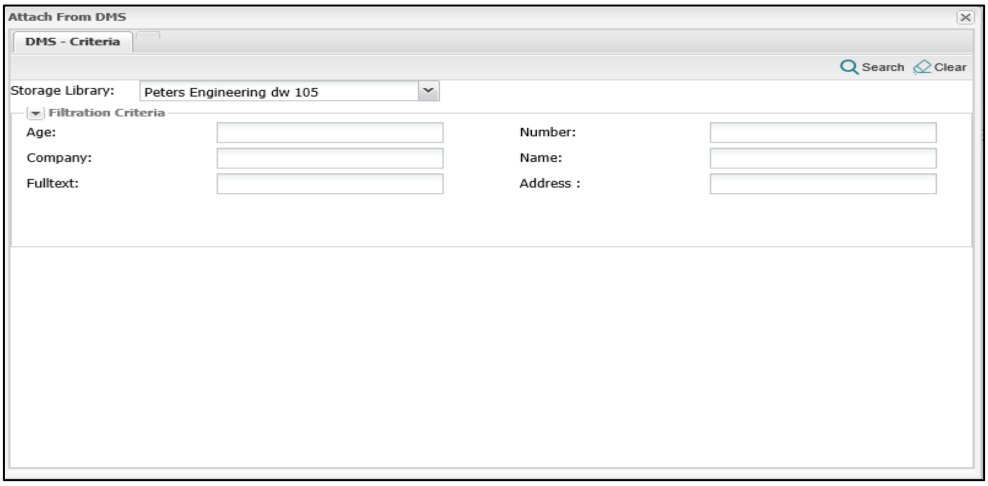


FIGURE 13: ATTACH FROM DMS – FILTRATION CRITERIA

4. Fill any fields if needed then click Search button.
5. You can use Clear button to clear the filtration criteria fields.
6. According to the values entered in filtration criteria, a list of documents will appear in the "DMS Result" tab as shown in the figure below:

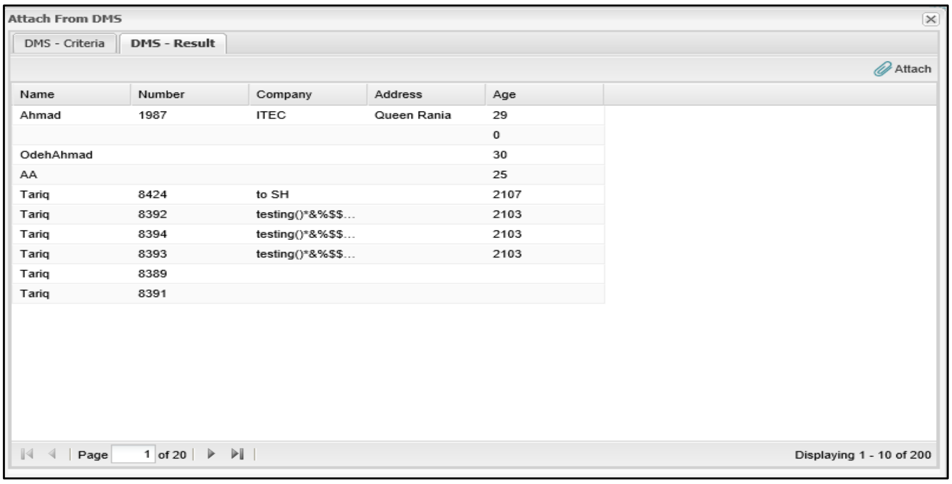


FIGURE 14: ATTACH FROM DMS – DMS RESULT

7. Select the document you wish to attach then click Attach button.

Note: If the document is attached from the DocuWare DMS system, the attached document type will always be PDF document.

3.1.1.7. Attach scanned files

To attach documents from scanner, you can use "Scan" button:

1. Click "Initiate Workflow" page, click "Attach File" button → "Scan" option,
The following popup appears:

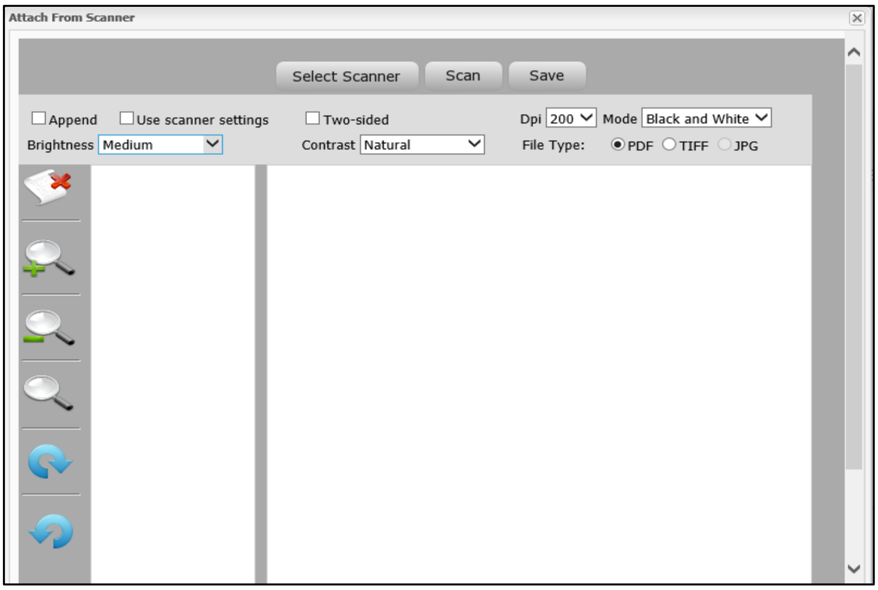


FIGURE 15: ATTACH FROM SCANNER

2. Click Select Scanner button to select the scanner you want to use to scan documents.
3. Click Scan button to scan documents.
4. Click Save button to save the scanned documents.
   You can use the buttons at the left panel to adjust the scanned documents if needed.
5. Click button to close the pop-up.

3.1.1.8. Attach Cases (Workflow/records)

To attach other cases and records to your case, you can choose "Attach File → Cases" option:

1. Click "Initiate Workflow" page, click "Attach File" button → "Cases" option.
   The following popup appears:

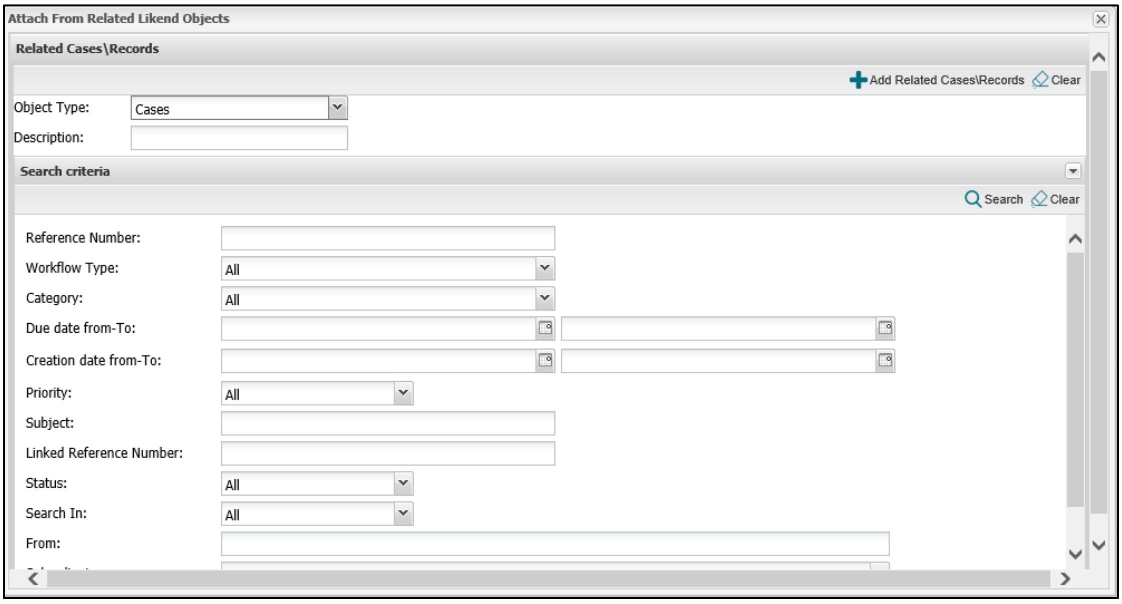


FIGURE 16: ATTACH RELATED LINKED OBJECTS

2. Select the object type you want to attach from, either records or cases.
3. Insert your values in the displayed search criteria.
4. Click Search button.
5. A list of records / cases related to your entered values in the search criteria will appear in the "Search Results" as shown below:

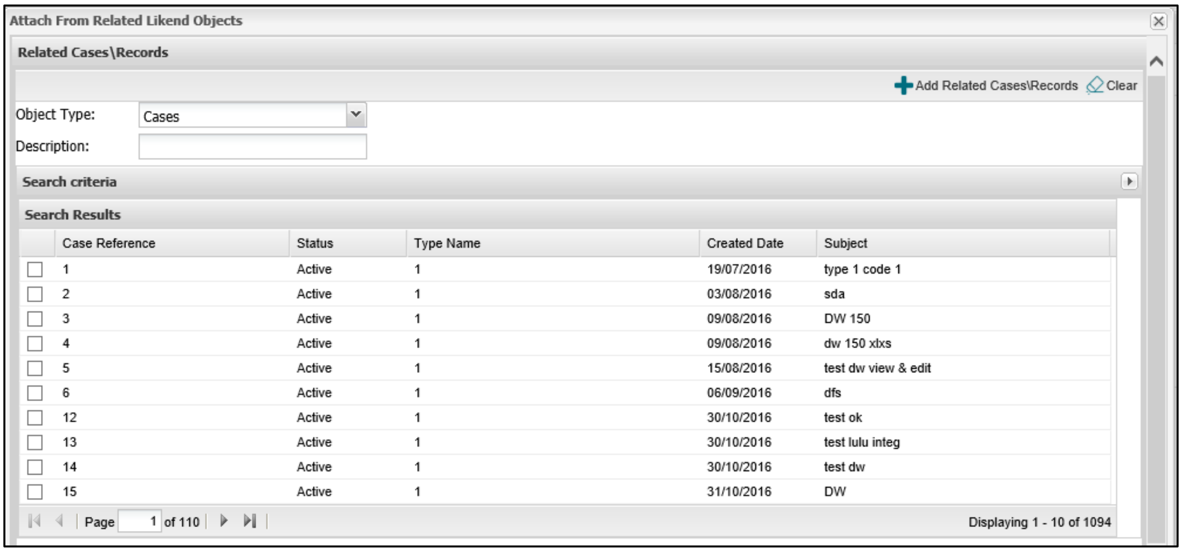


FIGURE 17: ATTACH RELATED LINKED OBJECTS – SEARCH RESULTS

6. Navigate through the results list using the navigation tool at the bottom of the page 

.
7. Select the record(s) / case(s) you want to attach.
8. Insert description about the selected record / case in "Description" field.
9. Click 

button to attach the selected record / case.

3.1.1.9. Viewing attachments

All types of attachments appear in the attachments panel at the bottom of the page.
To view attachments, click the attachment icon in the attachments panel as shown in the figure below:

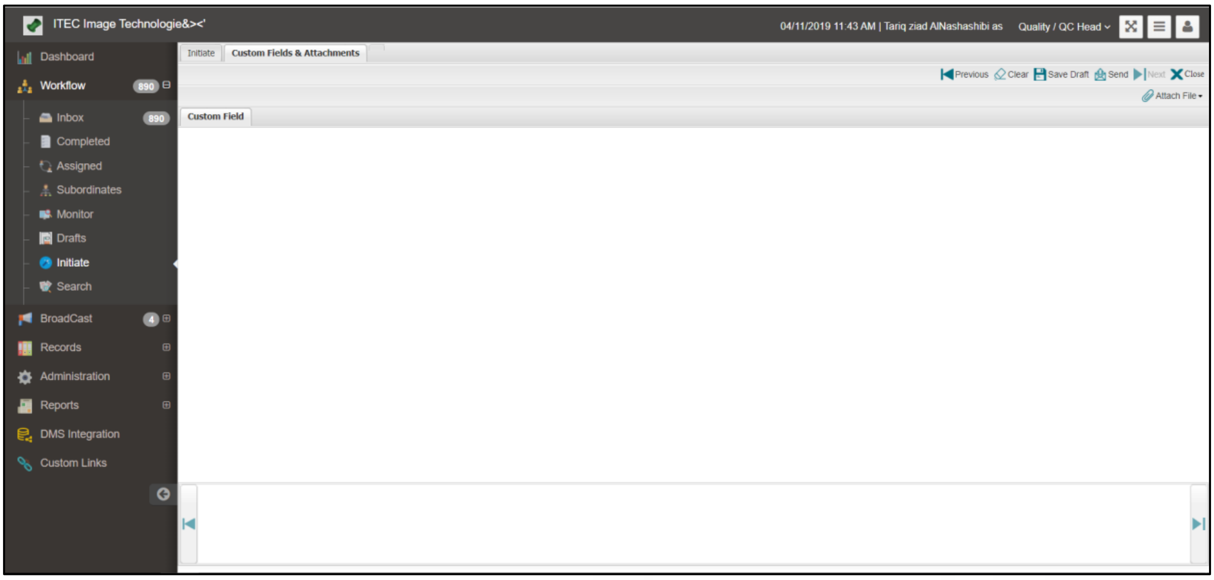


FIGURE 18: ATTACHMENTS POOL – VIEWING ATTACHMENTS

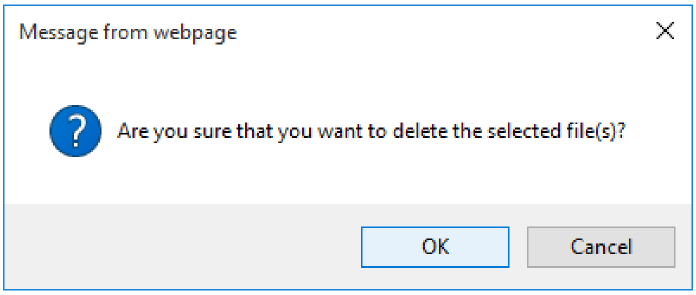
3.1.1.10. Deleting Attachments

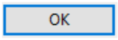
To delete attachments:

1. Click the related icon's  button in the attachments pool as in the figure below:

FIGURE 19: ATTACHMENTS POOL – DELETING ATTACHMENTS

2. Confirmation Message appear, as shown below:



3. Click  button; the attachment will be deleted.

3.1.1.11. Adding Predefined Comments to a Case

Predefined comments are comments already defined either by the user itself (through user preferences page) or by system administrators. You can add predefined comments to workflow/broadcast cases through the “Comments” section displayed below. You can add General Comments for all the case's recipients to read them or Restricted Comments which will be shown only by the recipient specified in “TO” field.

• You can insert a predefined comment by clicking the  button.

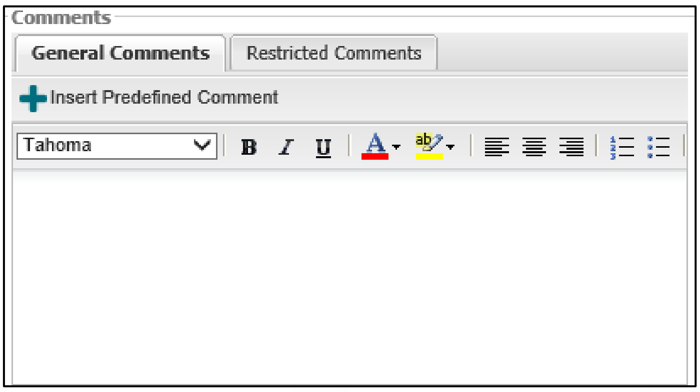


FIGURE 20: COMMENTS SECTION

• Once the user clicks on "Insert Predefined Comments" button, the following popup will be displayed:

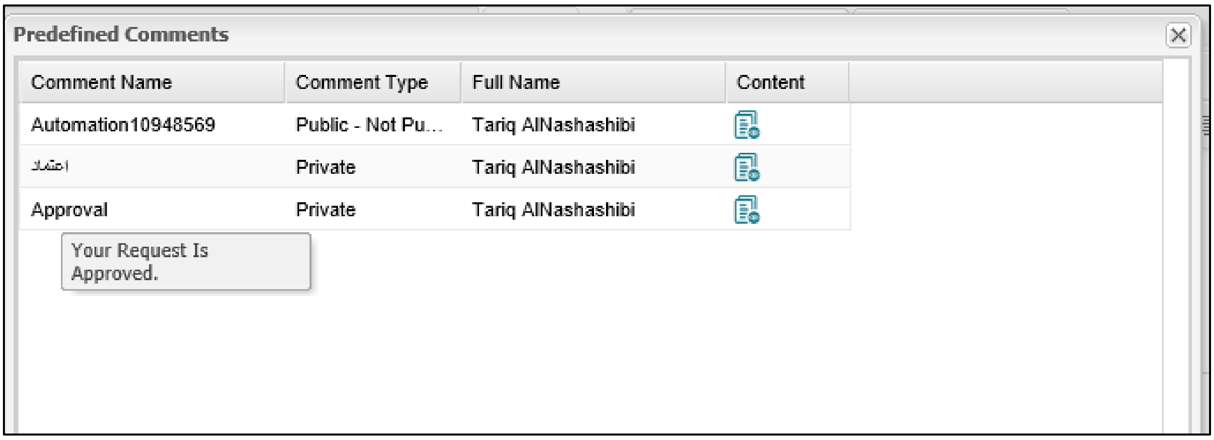


FIGURE 21 : PREDEFINED COMMENTS

Point mouse cursor over the comment name, a tooltip will be displayed to view the text content of the comment. Click on the "Content" button to view the content of the predefined comment. A text editor will be displayed in popup window where the content of the comment is displayed (as shown below).

Notes:

- The text area is editable, the user can add/modify the text, however, this will not make any changes on the original predefined comment.
- The user can click on (Insert) button to insert a predefined comment into the general or restricted comments fields.

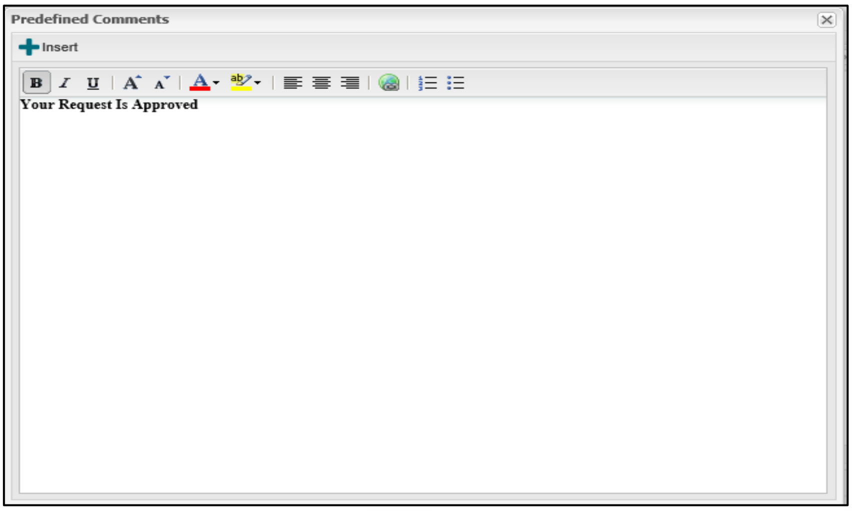


FIGURE 22:VIEWING THE CONTENT OF THE PREDEFINED COMMENT

3.1.1.12. Set Case Owner

The case owner is a node that is set to have a monitor privilege on certain case without the tracking permission and without override OS privilege.

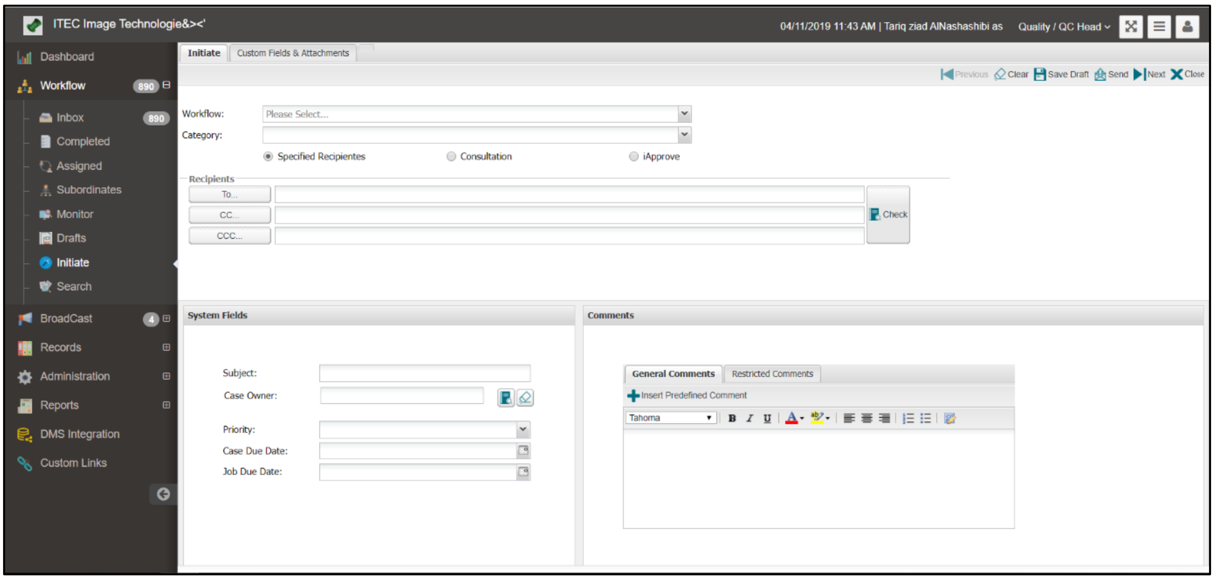


FIGURE 23: SELECTING A CASE OWNER

3.1.1.13. Consultation

you can consult other users by doing the following:

1. Navigate to the workflow item in the navigator.
2. Click "Initiate" sub tab, select "consultation" option.

The consultation page will be shown as below:

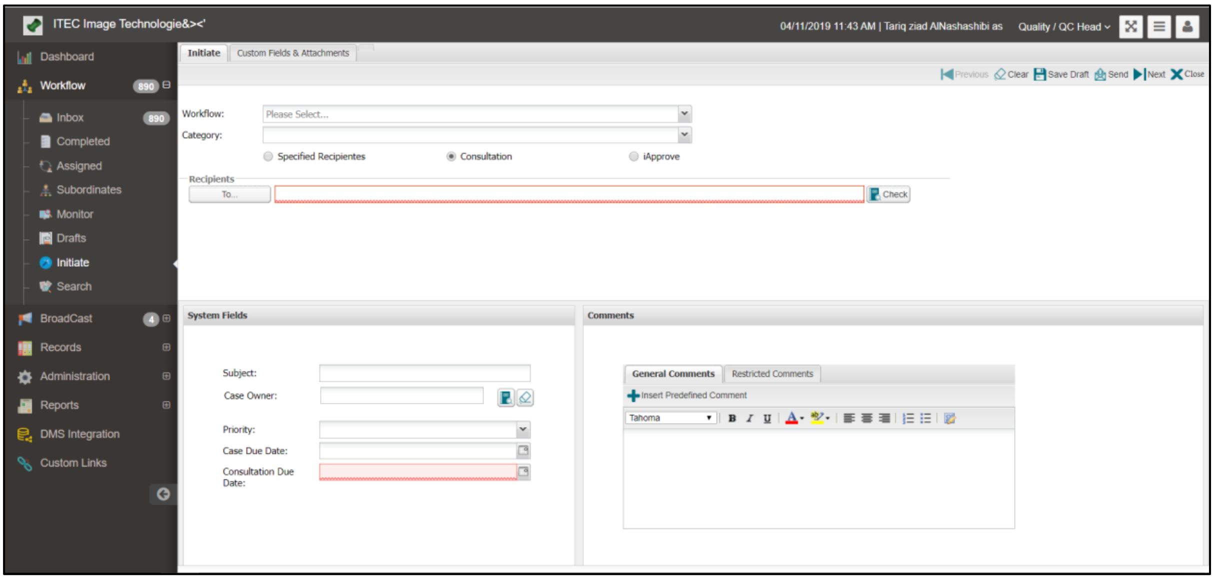


FIGURE 24: INITIATE - CONSULTATION

3. Select the nodes you want to consult using To... button.
4. Provide any required data and attachments if needed then click Send button.
   System will send the case to the initiator as well as send consultation to the consulted recipients.

3.1.1.14. iApprove

users can initiate iApprove Cases, by doing the following:

1. Go to Workflow item in the navigator.
2. Click “Initiate” sub tab, select “iApprove” option, the iApprove page will be shown as below:

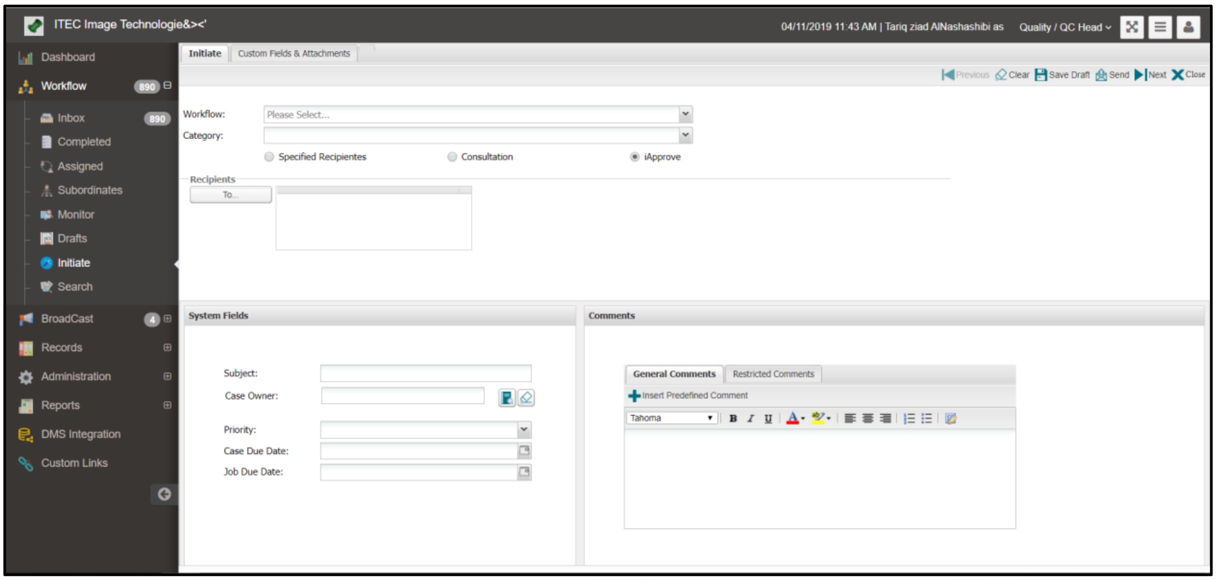


FIGURE 25: INITIATE – IAPPROVE

ITEC Image Technologies

www.itecj.com

3. Click on To... button to display the “Address Book“ window as below:

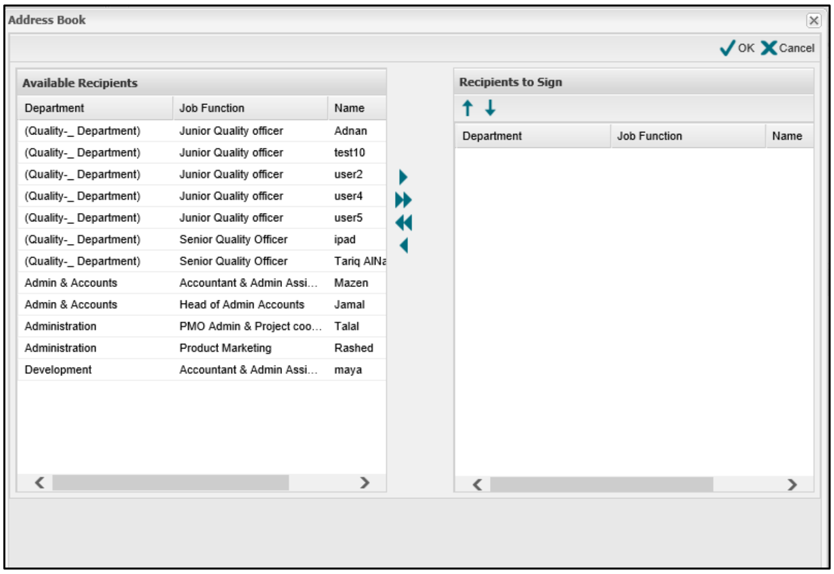


FIGURE 26: INITIATE - IAPPROVE - ADDRESS BOOK

4. Select the iPad nodes that you send them the iApprove action, click ✓OK button to accept the recipient(s) you have chosen or ✗Cancel to cancel the operation.
5. Fill in all the required data.
6. Navigate to “Custom fields & Attachments“ tab.

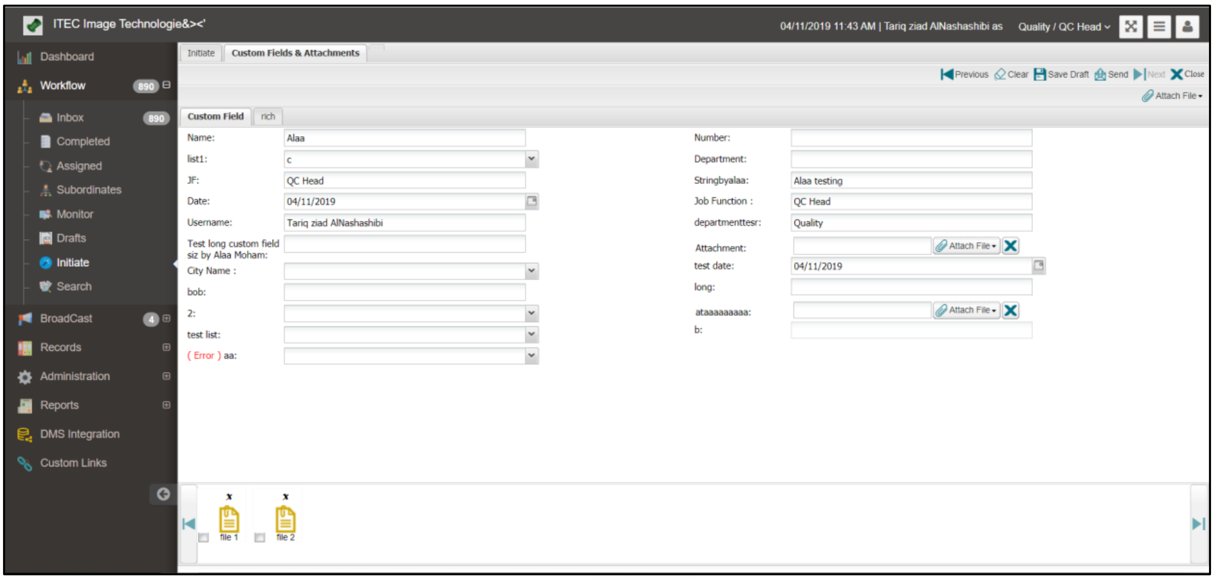


FIGURE 27: CUSTOM FIELDS & ATTACHMENTS TAB.

7. Attach documents and select the primary document (which will be sent for signing) by clicking on the enabled checkbox of it.
8. Click on Send button.
   System will send the case to the initiator and send iApprove request for all specified iApprove recipients.
9. The icon presents the original document sent for signing while the icon represents the signed document.

   Note: The Primary document (that will be sent for signing) can be of type: Doc, Docx, or PDF.

   If the case of iApprove is still in the inbox of the first recipient of iApprove, the user can cancel the sent iApprove action by recalling it from the completed tab.

Handling your Inbox

4. Objectives

1. Inbox shows workflow cases that you received from different nodes and requires your action.
2. Your Inbox shows cases you received in one of the following recipient types: TO, CC, CCC, Consult, Auto Assign, Committee, iApprove, or For Signing. For each recipient type, you can apply certain commands as shown in table 2.1 below.
3. Once you select a workflow case from your inbox, certain commands will be available depending on:
   a. How you received the case (your recipient type: To, CC, CCC, Consult, Auto Assign, Committee, iApprove, or For Signing.)
   b. Your privileges (Consult, Assign Case, Complete Case and subcases) that were given to you by the administrator.
4. New cases are displayed in bold style.
5. The priority columns have three labeled values: High, Medium and Low.
6. “Case Due Date” for the overdue workflow cases will be highlighted with a red color.
7. You can differentiate the cases that are sent for consultation. The initiator of consultation action can view the number of consultations replies and each one’s comments, date and time. Searching on these cases is easier through new search criteria.
8. You can differentiate the cases that contains “CCC” recipients by “# of Acknowledge” column, In Inbox list, “CCC counter” is shown, it is a popup that will be shown for the “To” recipient. It shows the CCC users that should do an acknowledgment on the case with their comments + approval date + time.
9. In Inbox list, if the user is processing a case in a specific page in the inbox, the user should remain on the same page until the processing is done.

   TIP: You can know your recipient type of each received case from the type column in inbox list that contains the type: CC, CCC, Consult, and Committee. “TO” case will be distinguished by empty value.

   The checklist table below contains a summary of commands available for each case:

Command	**Recipient Type**					
	To	CC	CCC	Consult	Committee Head	Committee Member
Generate Report	☒	☒	☒	☒	☒	☒
Open	☒	☒	☒	☒	☒	☒
Consult	☒			☒	☒	
Assign	☒					
Reply	☒			☒	☒	
Reply to all	☒				☒	
Forward	☒				☒	
Acknowledge		☒	☒			☒
Complete	☒					
Send To → Record	☒	☒	☒	☒	☒	☒
Send To → Workflow	☒	☒	☒	☒	☒	☒
Add notes	☒	☒	☒	☒	☒	☒
Subcase	☒				☒	
iApprove	☒				☒	

Table 1: Commands Checklist

- System displays the Workflow Inbox as shown below:

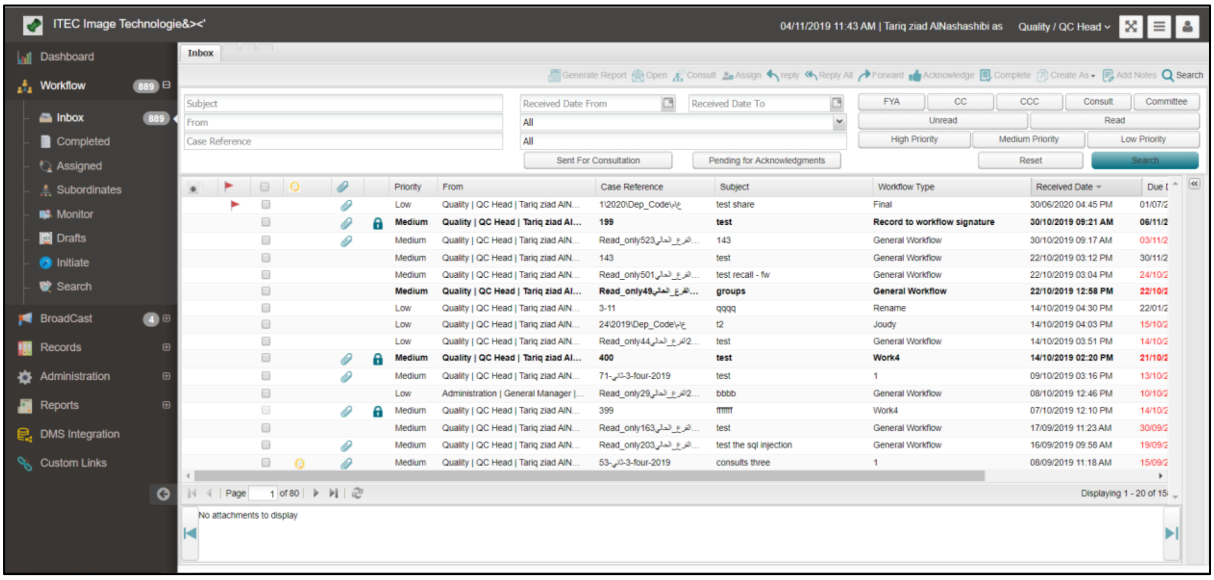


FIGURE 28: WORKFLOW INBOX

5. How to use the screens

To check your Workflow Inbox, follow below steps:

1. Click “Workflow” item from the navigator.
2. Click Inbox sub tab to view the list of cases you have received.
3. Select the case you want to handle.

❖ **Workflow Inbox Elements**

- You can search and view your cases using the advanced search panel shown in the above figure. You can use it to search on your cases of all types in your inbox. You can search using any of the following criteria:
  Subject, From node, Case Reference, Received Date From, Received Date To, Workflow Type, Workflow Category, Read or Unread cases, FYA, CC, CCC, Consult, Auto assign and Committee types, High priority, Medium priority, Low priority, sent for consultation and pending acknowledgments.
  Reset button used to clear the search criteria and to enable the user to select new search criteria.

5.1.1.1. Generating reports

Users can use "Generate Report" command to generate actions list report containing the case history for the selected case. The End-user can include specific actions by selecting one or more of the options available.

• To generate a report for a case, follow the steps below:

1. Select the case and click Generate Report button, the following page will appear:

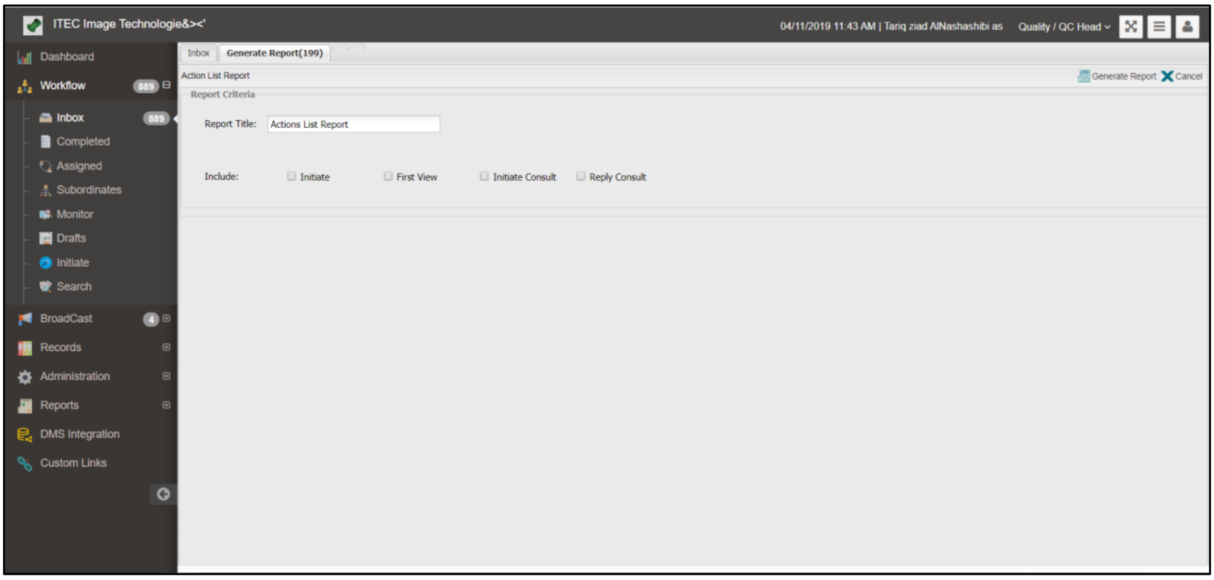


Figure 29: Actions List Report – Report Criteria page

2. Change the default title for the report that appears in the "Report Title" field above.
3. Include specific actions by selecting one or more of the displayed options (Initiate, First View, Initiate Consult and Reply Consult).
4. Click Generate Report button from the above figure; the report will be displayed with the option(s) you have chosen.
   Not selected options will be displayed in the Excluded Actions section.

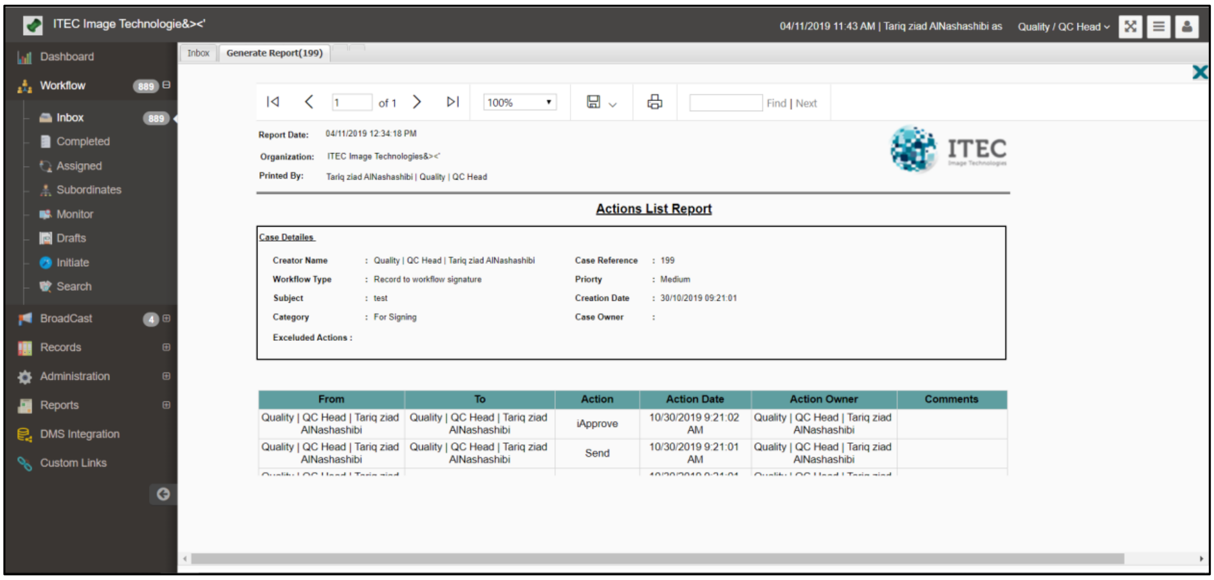


Figure 30: Actions List Report

5. You can print the report by clicking "Print" button, or you can cancel the operation by clicking "Back" button.

5.1.1.2. Opening a Workflow Case

To open a workflow case, select one from the Inbox and then click Open.
Alternatively, you can double click on it from the inbox.
The workflow case will open as below:

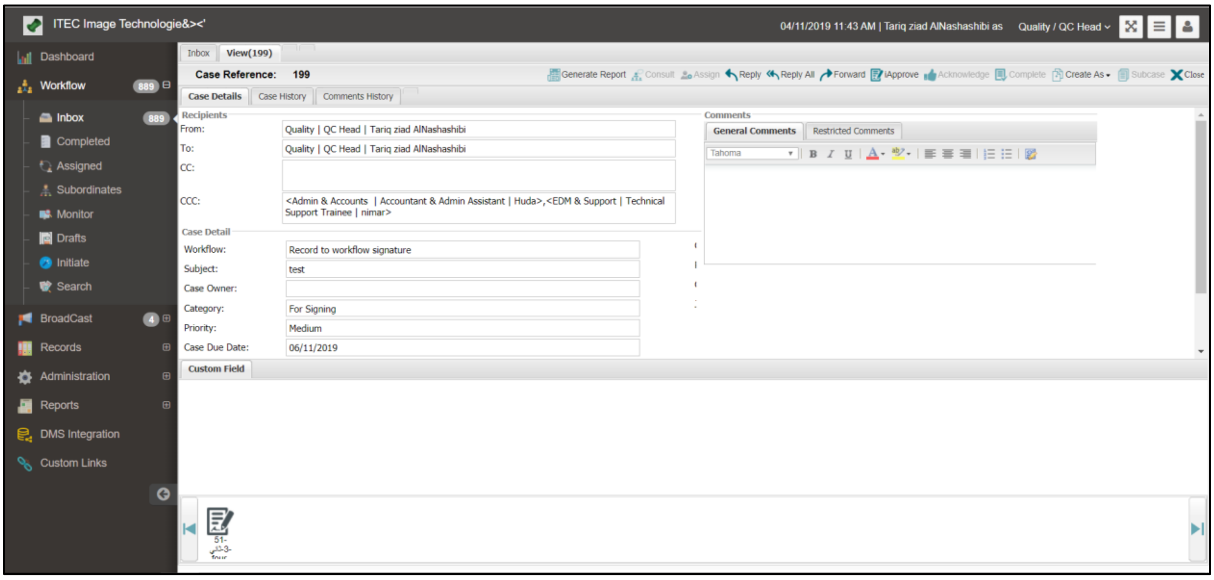


FIGURE 31: OPENED WORKFLOW CASE

In this page you'll find three tabs:

1. **Case Details**: Displays all the details that had been provided to the case.
2. **Case History**: Displays a log of all transactions applied on the case from its initiation until the current time.
3. **Comments History**: Displays all General comments on all actions on this case.

TIP: You can also select the Case from your inbox and then click the expand button at the right side of your inbox screen, so the following panel will be shown to you at the right side:

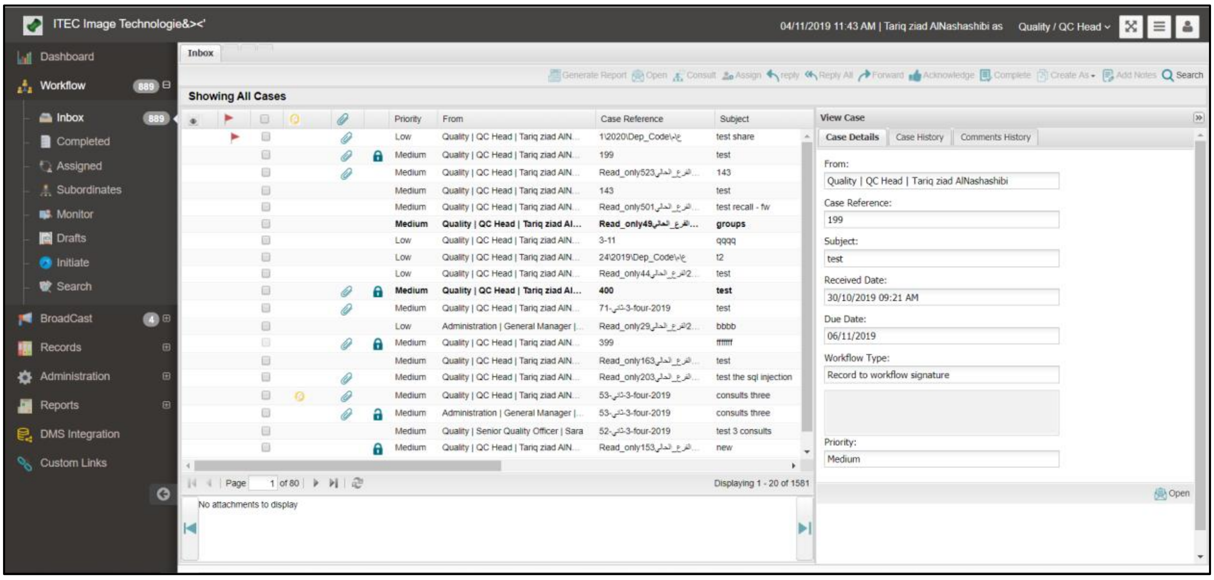


FIGURE 32: VIEW CASE PANEL FROM EXPAND BUTTON

You can use the Open button at the bottom right of the "Case Details" tab if you want to open the Case as shown in the "View" tab above.

Note: Once the user opens a case of type "Auto assign" or that an action of Auto-assign has been performed on it, the Auto-Assign From field will be displayed in the case details for all recipients of case To, CC and CCC.

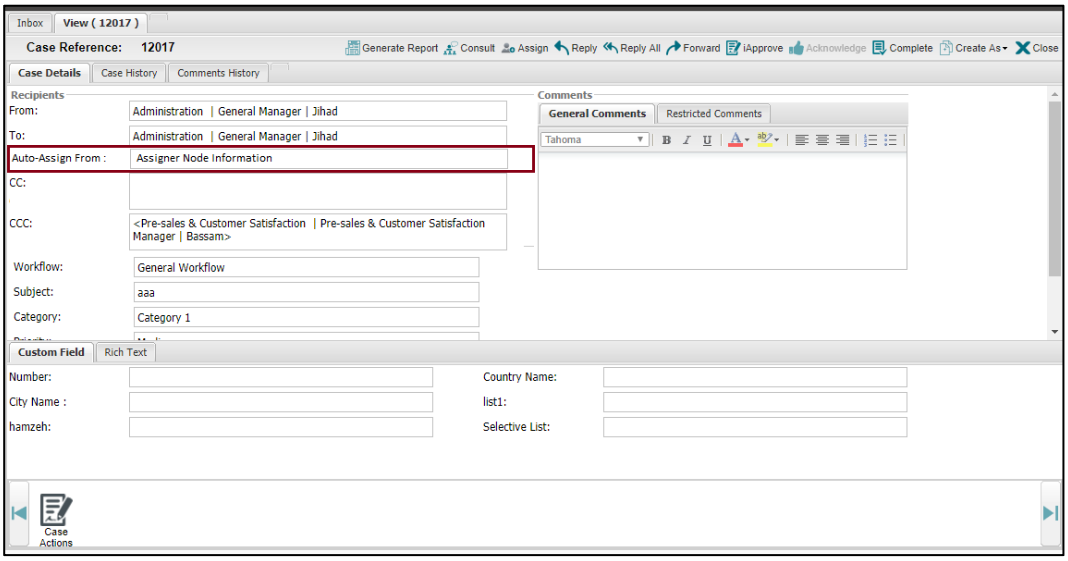


FIGURE 33: CASE DETAILS FOR AUTO ASSIGN

5.1.1.3. Consult others about a case

You can use the "Consult" command to consult others about the case you have received, knowing that the case will remain in your inbox with same privileges you already have.

To consult others about your received cases, please follow below steps:

1. Select the case you want to consult about.
2. Click Consult button, the following page will appear:

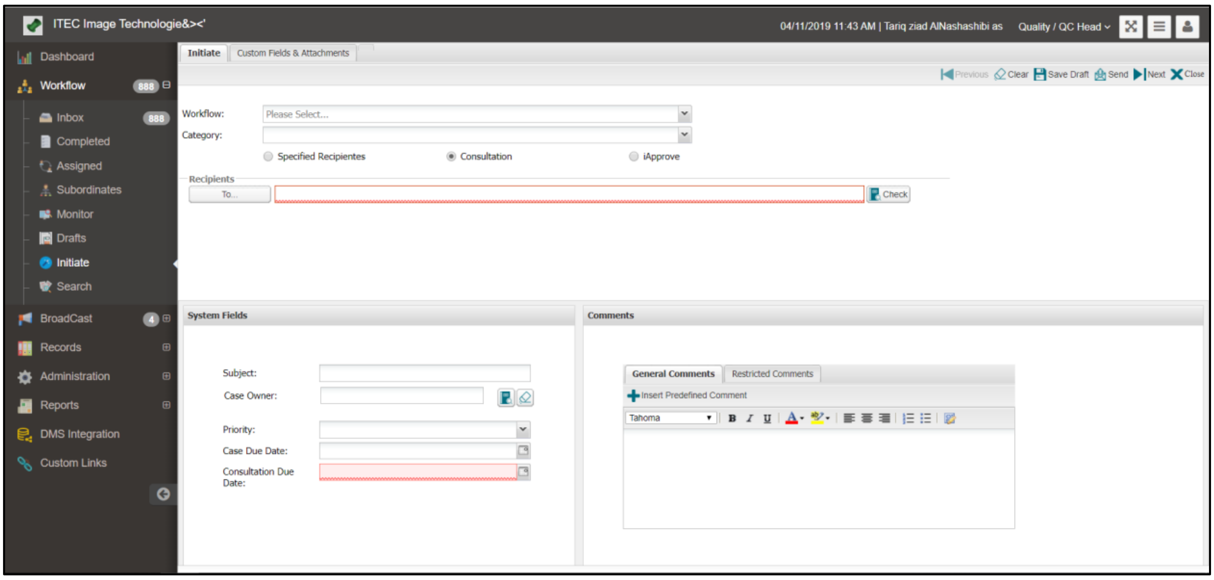


FIGURE 34: NEW CONSULT PAGE

3. Select the nodes you want to consult them using To... button.
4. Provide any required data and attachments if needed then click Send button.
   A confirmation message will be displayed to notify the user with the following (consultation has been sent successfully; would you like to go back to inbox).

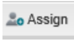
   If the user clicks "Ok", the user will be directed to the inbox page and the case will remain in the sender's inbox and will be sent to the recipient(s) inbox(s).

   In case the user clicks on "Cancel" button then the user will remain on consult page with keeping the original system fields values, custom fields values and attachments and clearing the defined values for the previously sent consultation.

5. You can cancel the operation by clicking Cancel button.

5.1.1.4. Assigning a case

This command is used to assign received cases from user to another user. The Assign action is only enabled if users have the needed privilege. To assign cases, do the following:

1) Select the required case from your inbox and check the checkbox for that case.
2) Click 

button. The following popup will appear:

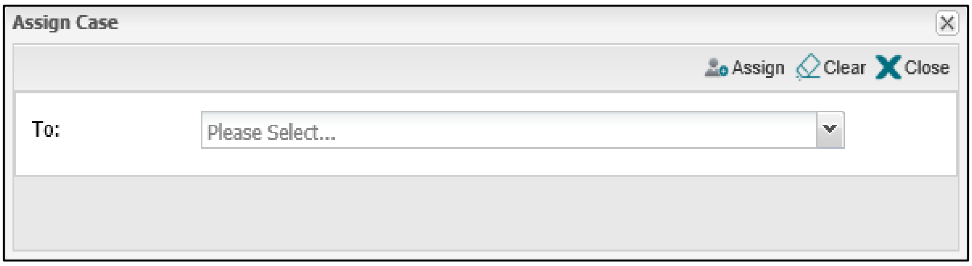
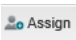


FIGURE 35: ASSIGN CASE

3) Assigning a workflow case to a node should inherit all privileges through the lifetime of the case. For any assigned case, the node will always keep the inherited privileges throughout the life cycle of the case until it is closed or no longer assigned to the user, this goes for both auto and manual assign. When replying to the original (Assigner), System will automatically send the case to the assigned node.

4) Assigner should be able to:
   4.1 Assign workflow cases to "n" level beneath his/her own in the organization structure:
   For example: If Node A is the parent of Node B and Node C, Node B is the parent of Node D, and Node D is the parent of Node E, then Node A will be able to:
      a. Assign workflow cases from Node A to Node B and Node C: (Level #1)
      b. Assign workflow cases from Node B to Node C: (Level # 1)
      c. Assign workflow cases from Node B to Node D: (Level # 2)
      d. Assign workflow cases from Node A to Node D
      e. Assign workflow cases from Node A to Node E
      f. Assign workflow cases from Node B to Node E

   4.2 Assign workflow cases to 1 level up in the organization structure:
   For example: If Node A is the parent of Node B and Node C, Node B is the parent of Node D, and Node D is the parent of Node E, then Node A will be able to:
      a. Assign workflow cases from Node B to Node A
      b. Assign workflow cases from Node C to Node A
      c. Assign workflow cases from Node D to Node B
      d. Assign workflow cases from Node E to Node D

   4.3 Click on 

button, the workflow case will be transferred to the inbox of selected node.

   4.4 The workflow case will be moved from your inbox to your "Assigned" tab.

5.1.1.5. Reply/Reply to all

You can use "Reply" or "Reply to All" commands to reply on a received case, either to reply only to the case sender, or to the all case's recipients including its sender.

To reply only to the case sender, follow the below steps:

1. Select the case which you want to reply.
2. Click reply button, the following page will appear:

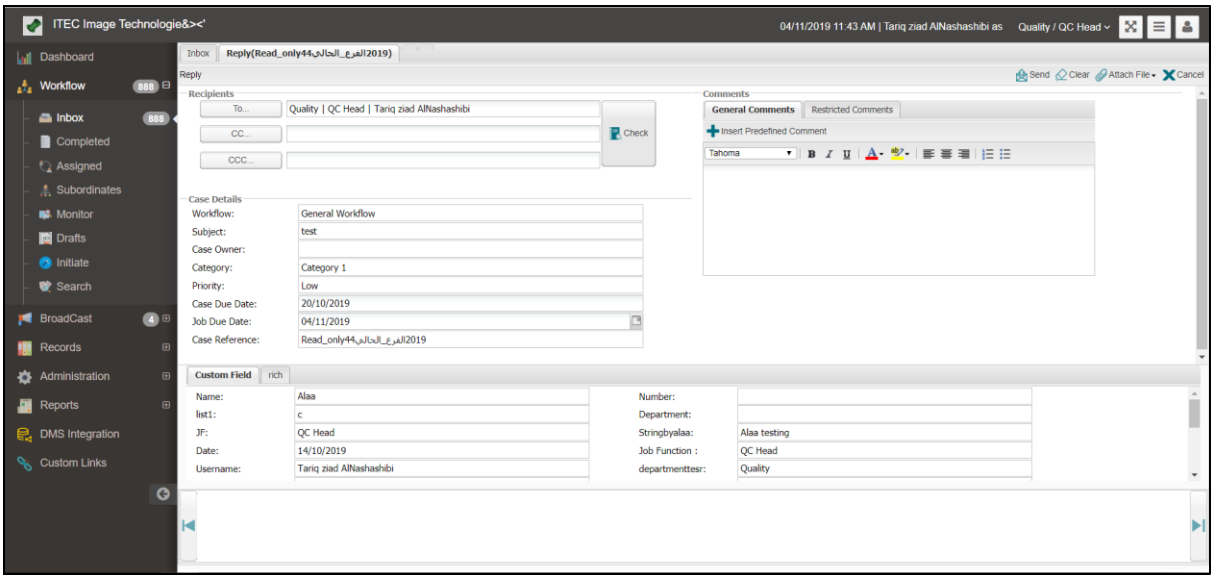


FIGURE 36: REPLY ONLY TO THE CASE SENDER

3. Provide any required data and attachments if needed, and then click Send .
   The case will be transferred to the sender's completed tab and to the recipient's inbox.
4. You can cancel the operation by clicking Cancel button.

To reply to all case recipients including its sender, follow the below steps:

1. Select the case which you want to reply to all recipients.
2. Click Reply All button, the following page will appear:

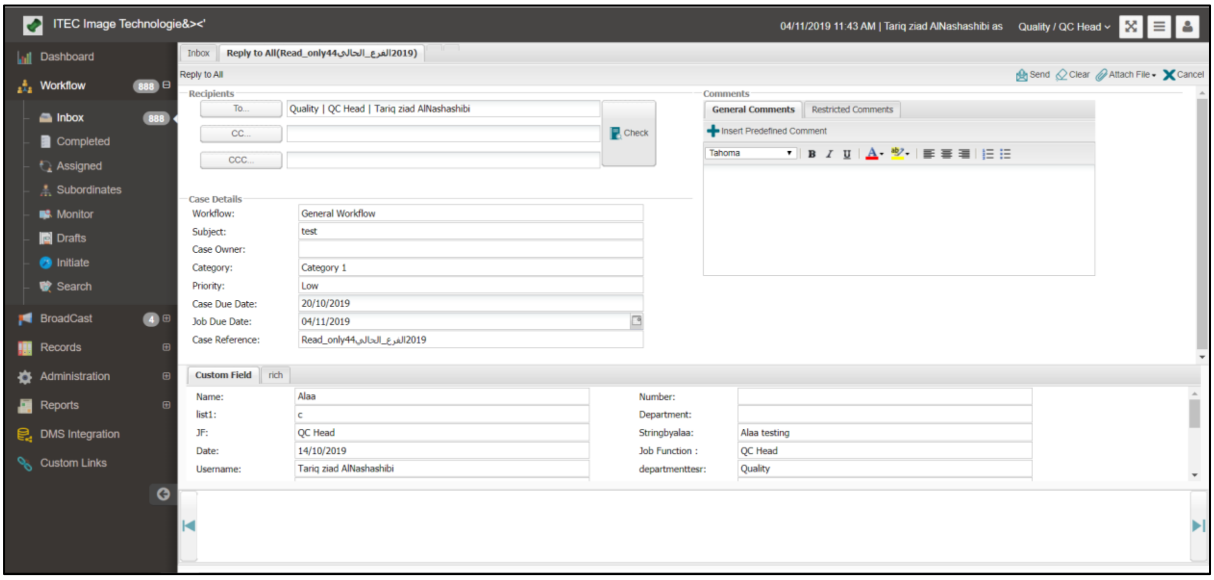


Figure 37: Reply to all case recipients

3. Provide any required data and attachments if needed then click Send button, the case will be transferred to your completed tab and to the inboxes of both recipients and sender.
4. You can cancel the operation by clicking Cancel button.

Note: Once the user replies for a case of type auto assign, the Required CC field will appear disabled, displaying the node information of the assigner node.

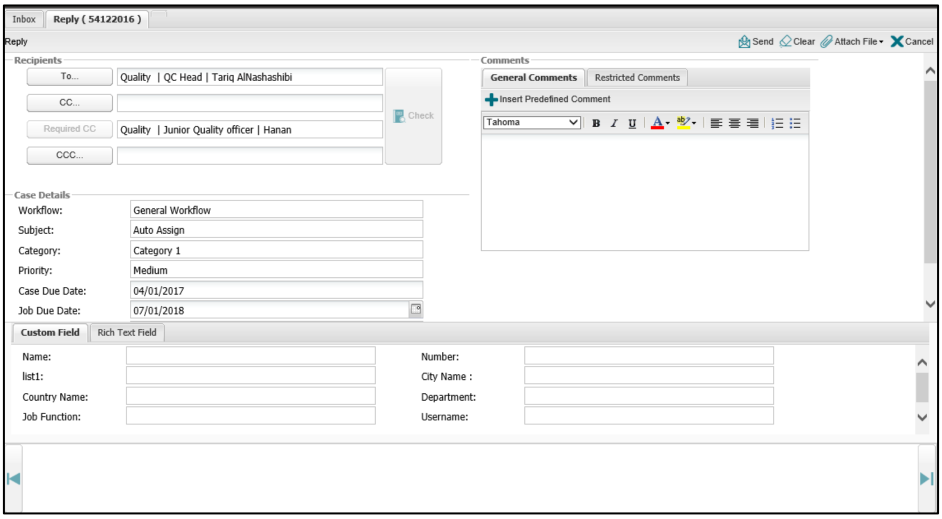


Figure 38: Replying case of type Auto Assign

5.1.1.6. Forward a case

Use this command to forward the Case to another node(s). To forward your cases, please follow below steps:

1. Select the case you want to forward.
2. Click Forward button, the following page will appear:

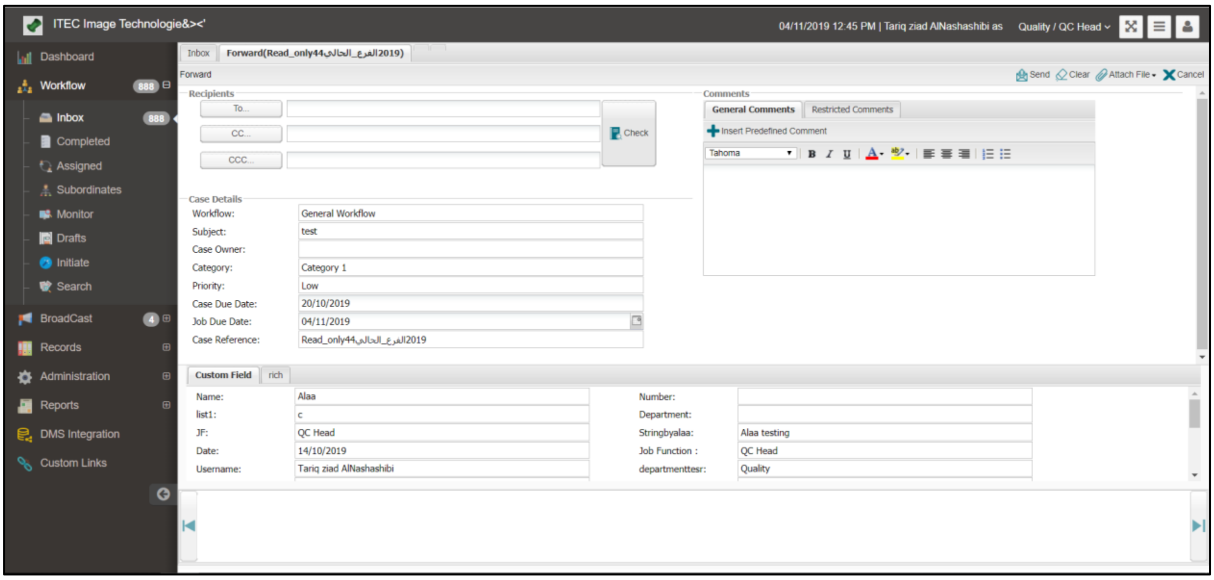


Figure 38: Forwarding a Case

1. Select the node(s) to which you want to forward the case.
2. Provide any required data and attachments if needed, then click Send button, the Case will be transferred to your completed tab and to the recipients' inboxes.
3. You can cancel the operation by clicking Cancel button.

Note: Once the user forwards a case of type auto assign, the Required CC field will appear disabled, displaying the node information of the assigner node.

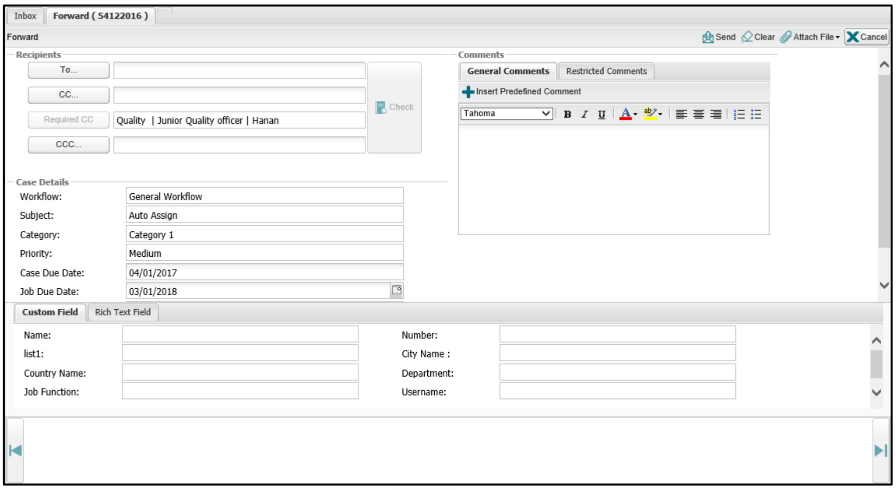


Figure 39: Forwarding a case of type Auto Assign

ITEC Image Technologies

www.itecj.com

5.1.1.7. Acknowledge “CC” and “CCC” cases

Use this command to acknowledge your received “CC” and “CCC” workflow cases. To acknowledge your received “CC” and “CCC” cases, follow the below steps:

1. Select the case that you received as “CC” or “CCC” recipient.
2. Click Acknowledge button, the following page will appear:

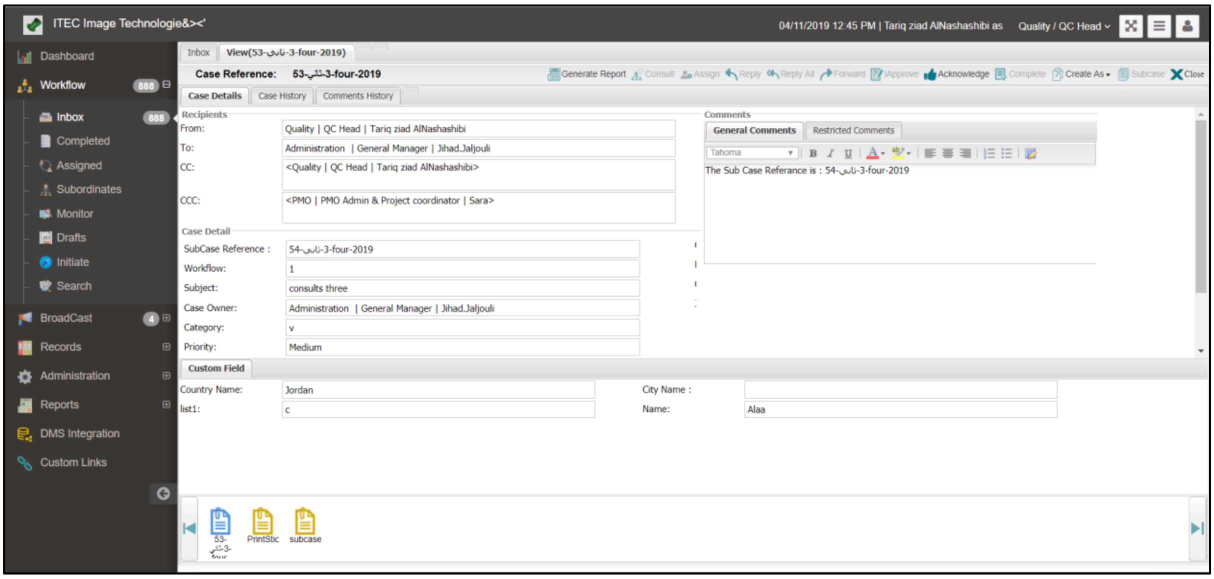


FIGURE 40: ACKNOWLEDGE A RECEIVED “CCC/CC” CASE

1. Add any comments if needed and click Acknowledge button, “CC” and “CCC” recipients can add General or Restricted Comments.
2. You can cancel the operation by clicking Close button.

   Acknowledged actions will be shown as actions in the Recipients case history.

   Once all “CCC” recipients acknowledged the case, then the case’s Recipient will be able to send (Forward/Reply/Reply to all) the case to other nodes.

5.1.1.8. Completing a case

Use this command to declare the case as a completed and to prevent any further actions on that case. To complete a case, follow the below steps:

1. Select the case (from your inbox) that you received as “FYA” recipient.
2. Click Complete button, the following popup will appear:

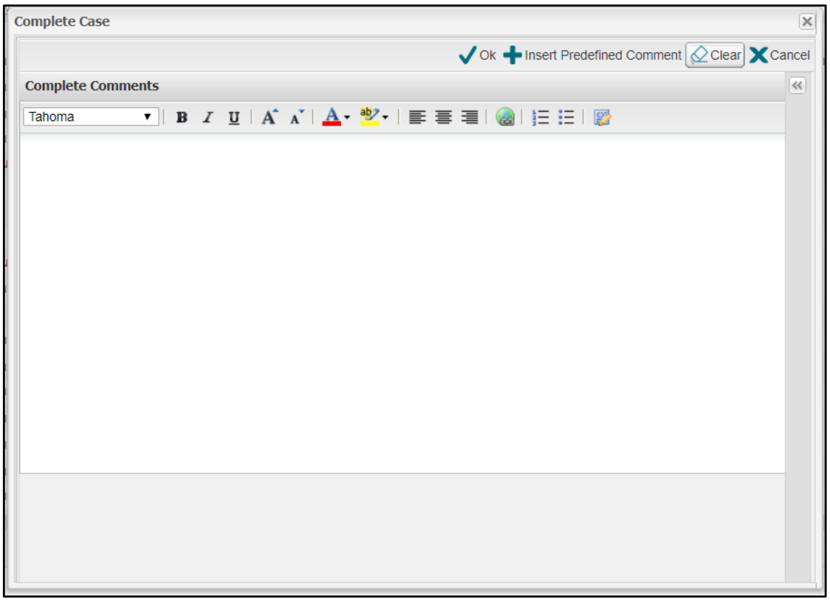
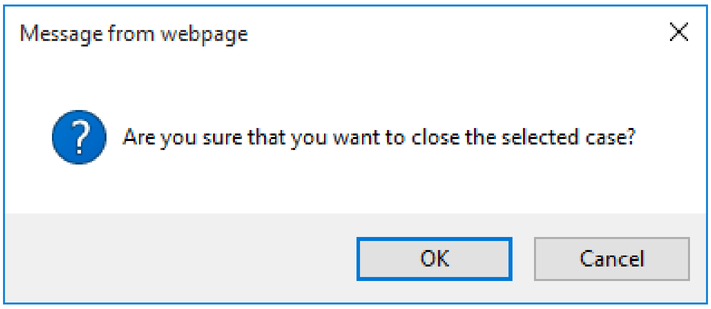


FIGURE 41: COMPLETE CASE POPUP

3. Add any comments for closing the case or insert it from the predefined comments using 

button, click 

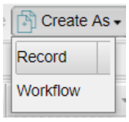
button to close the case.
4. A confirmation message will appear to you as shown below:



5. Click "OK" button to confirm completing the case, the case will be transferred from your inbox to your completed tab.

5.1.1.9. Sending a case to a new case or record

To send your case to a new record by using "Create As" list, please follow the below steps:

1) Select the case then use "Create As"→ "Record" 

command to create a new record based on the data in the custom fields of the selected workflow case.
The following pop-up will appear:

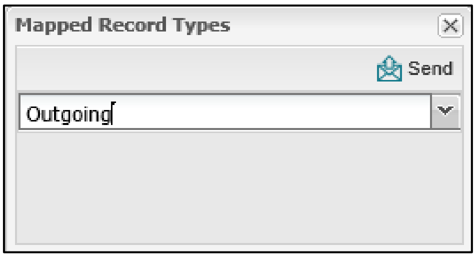
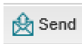
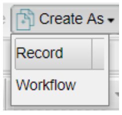


FIGURE 42: MAPPED RECORD TYPES

2) Select the desired mapped record type to initiate a new record and click on  button.
3) The "Creation" tab of "Records" will be displayed including the mapped case's data (as some case's data is mapped with the selected record type). The value mapping (from the workflow case to the new record) is defined by administrator.
4) The workflow case will be put as an attachment inside the new record.

TIP: For more details about initiating records, please refer to section Initiating a Record.

To send your workflow case to a new case by using "Create As" list, please follow below steps:

1. Select the case then use "Create As → Workflow"  command to initiate a new workflow based on the data of the selected case, by clicking on that command the following popup will appear:

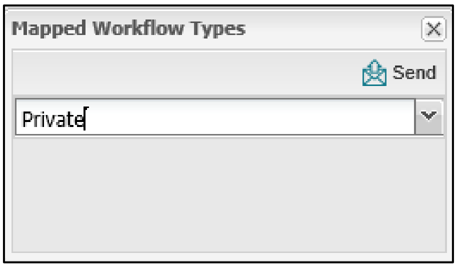


FIGURE 43: MAPPED WORKFLOW TYPES

2. Select the desired mapped workflow type to create a new case and click on  button.
3. "Initiate" tab of "Workflow" will be displayed to you including the mapped case's data (as some case's data is mapped with the selected workflow type). The value mapping (from the workflow case to the new case) It's defined by the administrator.
4. Workflow case will be set as an attachment inside the new workflow.

Tip: If the notification server is activated by the system admin, you will receive a notification when you get a new case.

5.1.1.10. Add Notes to cases in the inbox

Users can add notes on any of the cases in their inbox. These notes are not seen by any other users even the supervisor (Direct Manager) will not be able to access the notes of their subordinates through the subordinates' page. Taking an action on the case like (Forward, Reply, reply all, iApprove, Complete, Assign, Acknowledge) will clear the notes. Except consult action will not clear the notes as the case is still in the inbox.

Recalling or reopening a case that had a note when it was in the inbox will display the notes icon again, and show the notes that were available before taking an action.

All users within the same shared node will have access to the same notes.

How to use the screens

1. Select case in workflow inbox.
2. Click "Add Notes" Button.

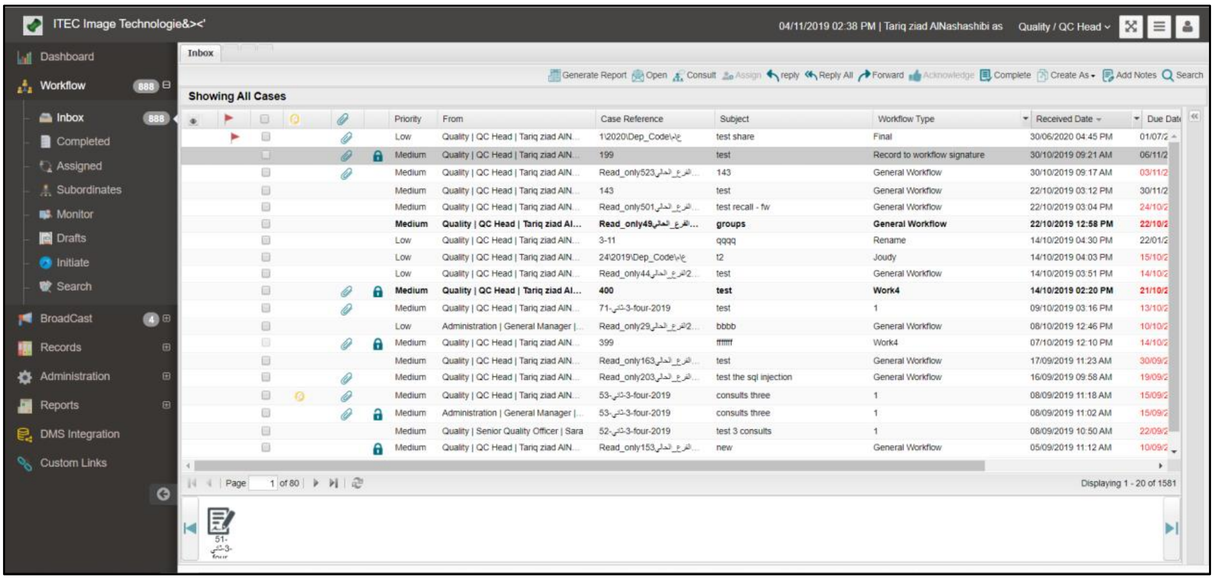


FIGURE 44: WORKFLOW INBOX

3. Add your Notes in Add Notes popup.

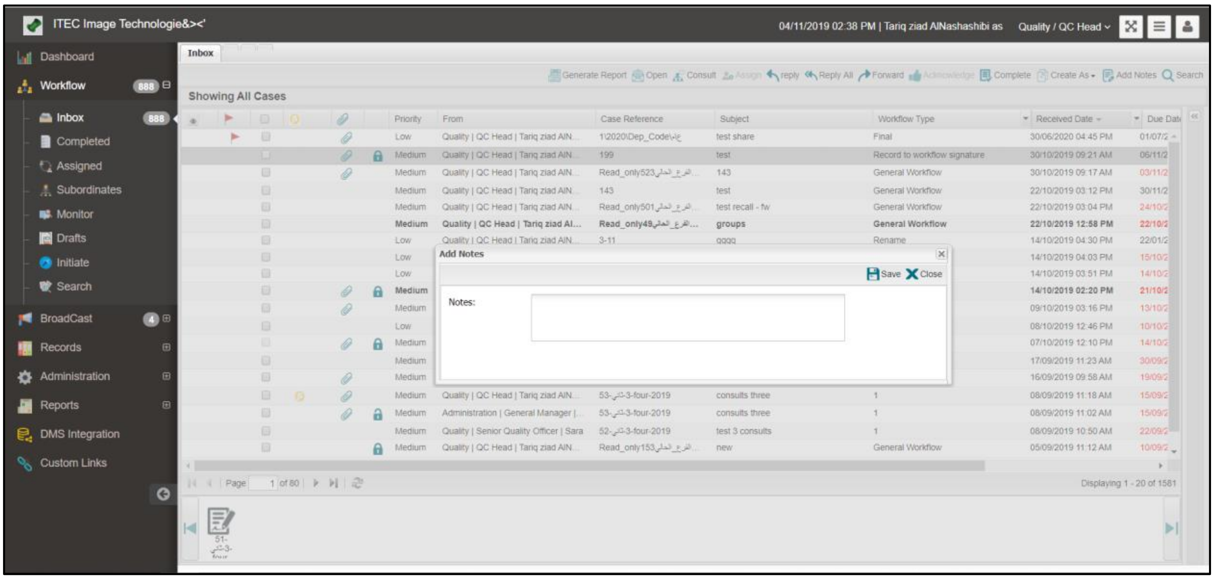


FIGURE 45: ADD NOTES POPUP

4. Notes icon will be displayed besides the case in the inbox as a flag .
5. The case notes will be shown automatically once you move the mouse cursor over the flag icon

5.1.1.11. Subcase

The main value of using the subcase action to divide the work done on certain case to multiple cases where each case is sent to certain nodes based on the division of work done on the original case.
When a workflow case is divided to multiple sub-cases, the original case will become as a reference to the workflow sub-cases, you will not be able to take an action on it, then the actions will be done on the sub-cases, when all sub-cases are closed and finalized, the original workflow case will be automatically closed by the system.
Through the subcase functionality, the privileged FYA recipient To will be able to divide the work to be done on a certain case to multiple sub-cases.

The Reference number for the sub-case will be the same of original in addition to the sub-case reference number, Sub-case reference will be generated based on the code schema definition for the sub-case number.

how to use the screens

1. Click “Subcase” on the toolbar of the case.

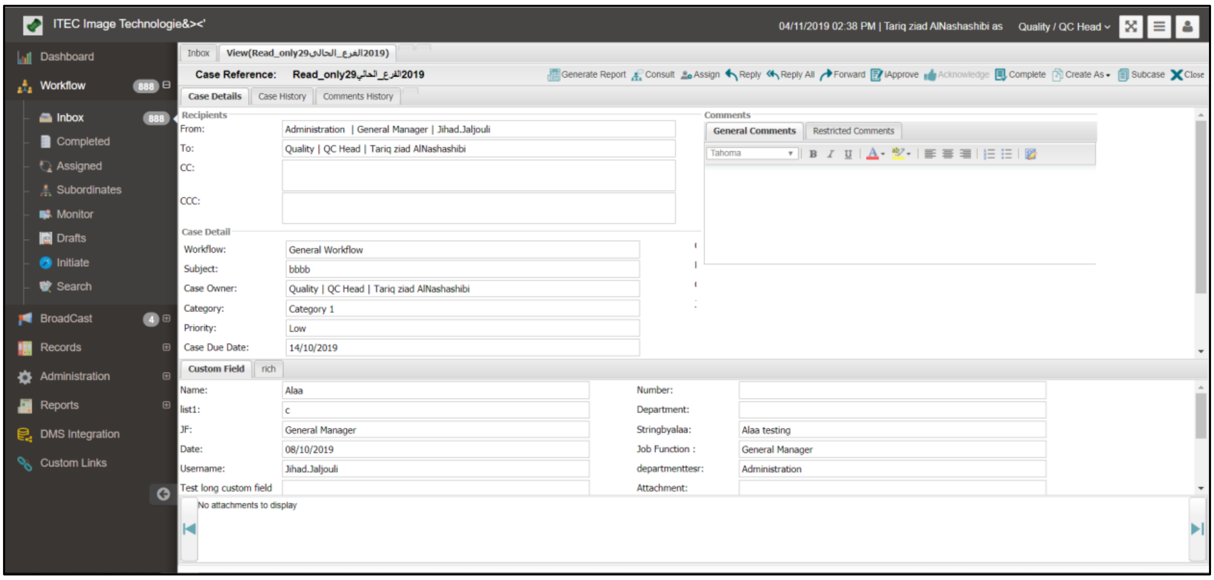


FIGURE 46: TOOLBAR

2. New Tab will open with all original system fields, custom fields and attachments will be filled automatically with the same case Ref (followed by sub-reference) and will be disabled.

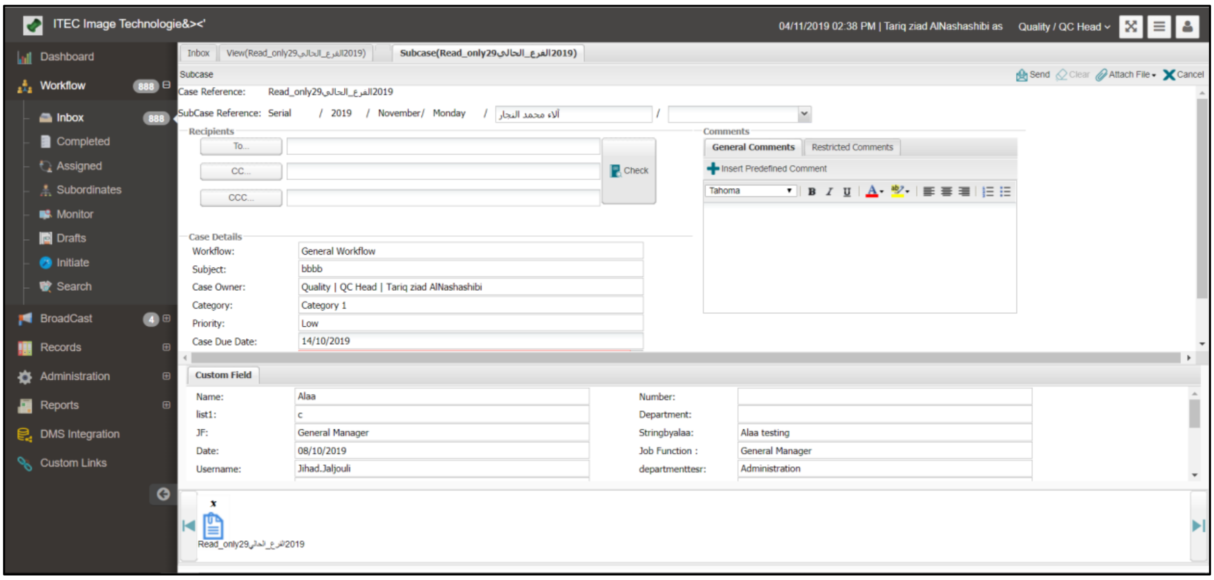


FIGURE 47: SUBCASE PAGE

The icon will differentiate the subcases, as the below:

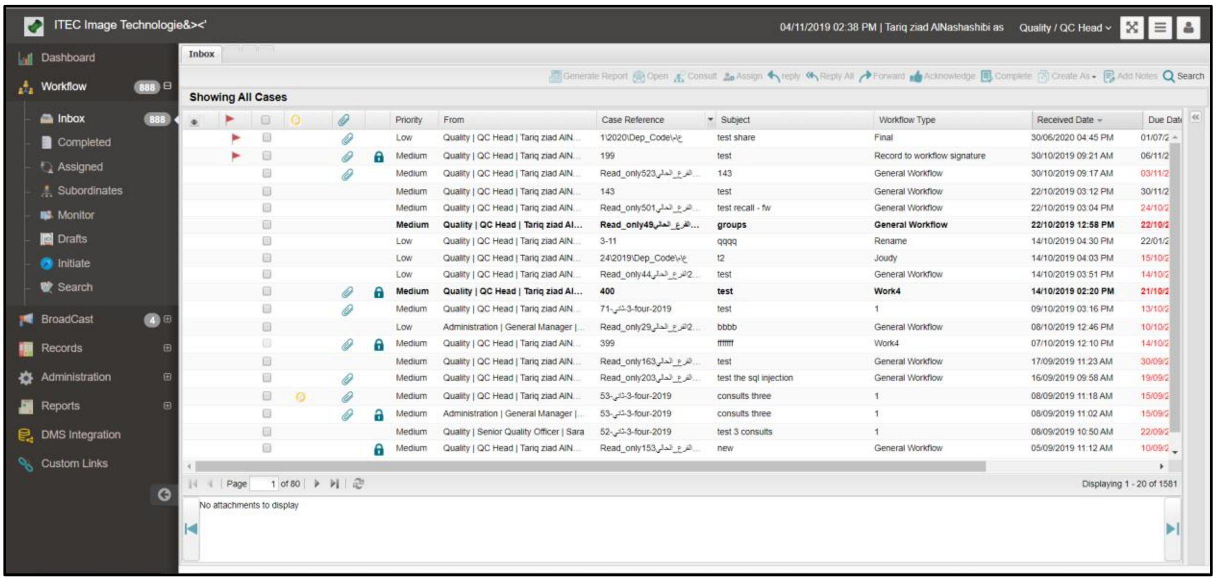


FIGURE 48: SUBCASE ICON

Notes:

1. The original case will be closed automatically once all sub cases are closed.

2. The Original case that have active subcases will not be editable.

When a new workflow of type “Sub Case” is sent, the user will be able to view the Sub case reference of this workflow in the “Case History” and “Comments History” as shown below:

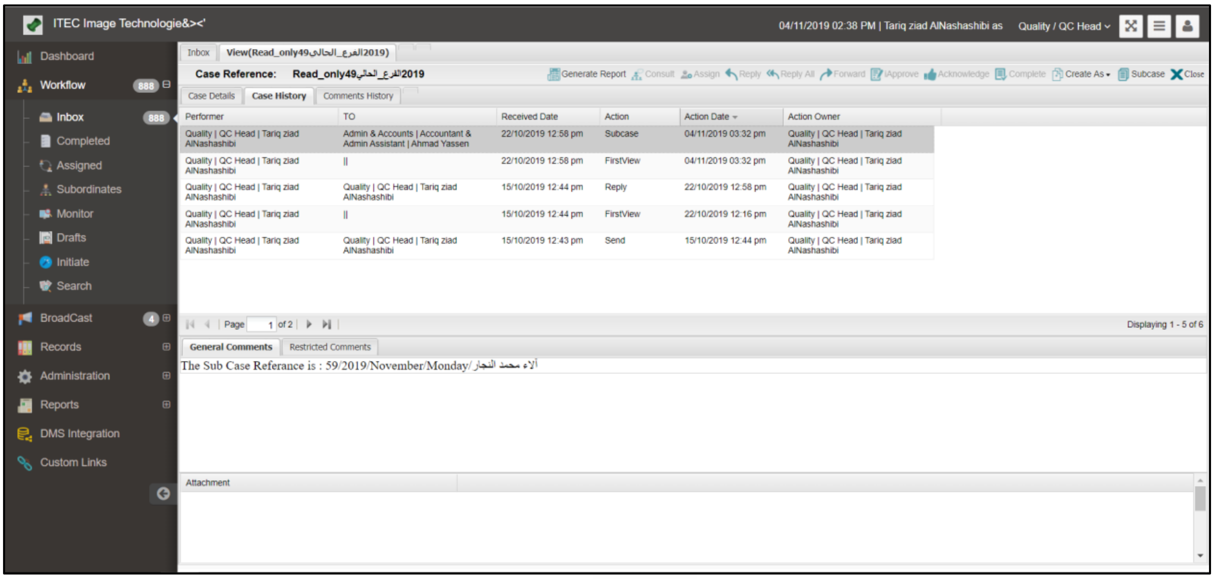


FIGURE 49: CASE REFERENCE – CASE HISTORY

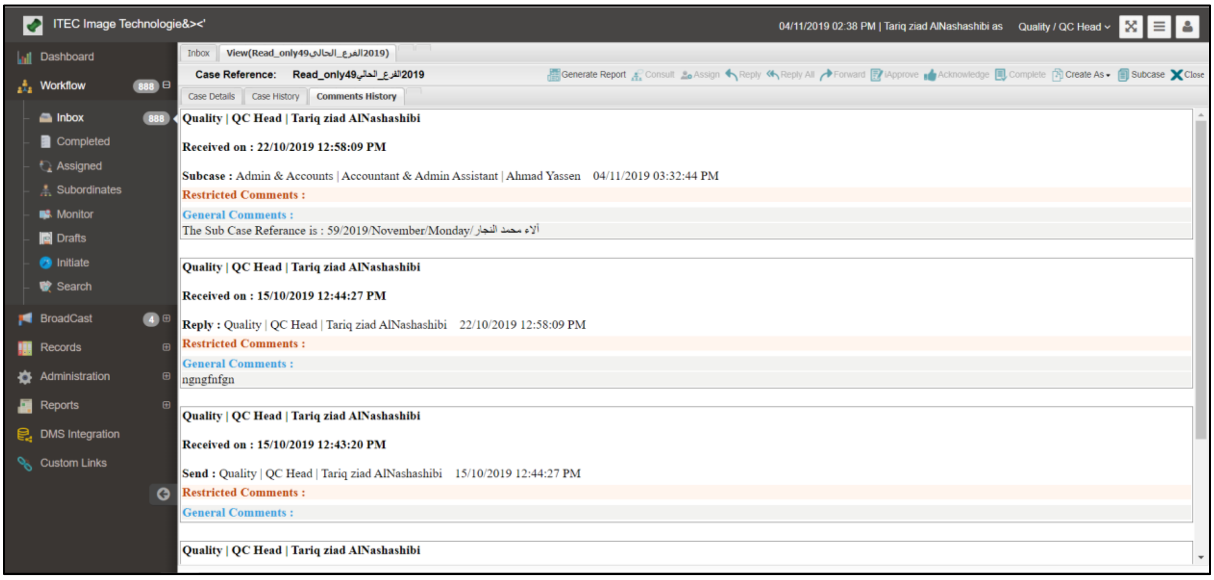


FIGURE 50: CASE REFERENCE – COMMENTS HISTORY

Customizing Inbox List

6. Objectives

Sometimes you need to display in “Inbox” tab some custom fields or displaying all of them for a specific workflow type. This feature enables you to configure the inbox list view by selecting the desired custom fields to be shown.

7. How to use the screens

To define which columns to appear in “Inbox” tab, follow the below steps:

1. Using the advanced search panel, select any workflow type then click on "Search" button.
2. Click  button in “Inbox” tab, as shown below:

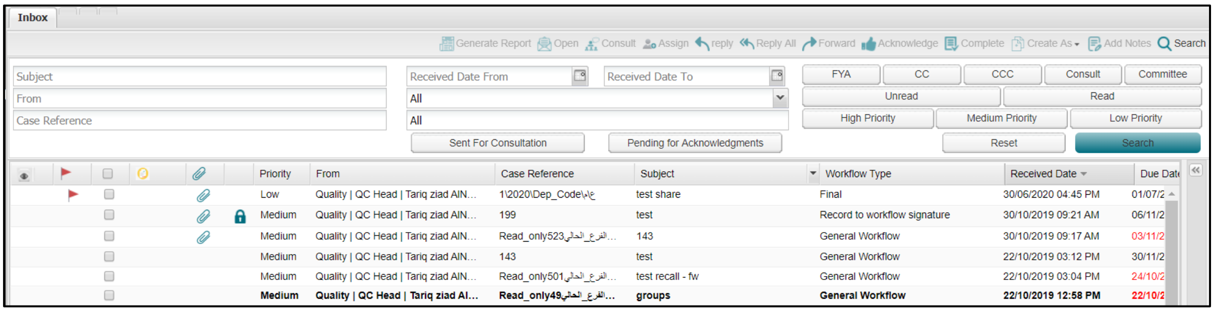


FIGURE 51: INBOX LIST

3. The popup window will look as shown below:
   - All custom fields are displayed for the selected workflow type except custom fields of type rich text and attachments.
   - Checkbox will be displayed beside every custom field.

- Default value for the checkbox is unchecked.

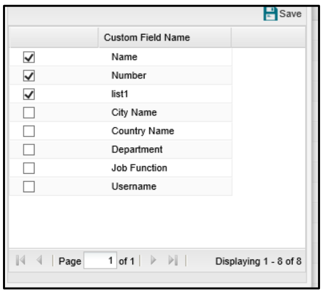


FIGURE 52: ADVANCED SEARCH -SELECTING FIELDS

4. Select which columns you would like to display in the Inbox list.
5. Click  button to reflect the changes into "Inbox" tab.

→ Note that clicking Save applies the following actions:

- Close the popup window.
- Refresh the inbox page.
- Display the selected custom fields in the inbox grid.
- The extra fields will be displayed after the (# of acknowledgments) column.
- The selected custom fields will be saved for the workflow type and user. Whenever the user selects the workflow type from the advanced search using any assigned node, the selected custom fields will be displayed automatically.

6. You can use  button to cancel the operation.

Handling your Completed Cases

8. Objectives

The completed tab displays the cases that you sent (initiated/consulted/replied/forwarded/replied to all/acknowledged) out from your inbox to other nodes. It also displays the workflow cases that you have closed.

9. How to use the screens

To check your Completed cases, follow the below steps:

1. Go to Workflow item in the navigator.
2. Click Completed sub tab, the following page will appear:

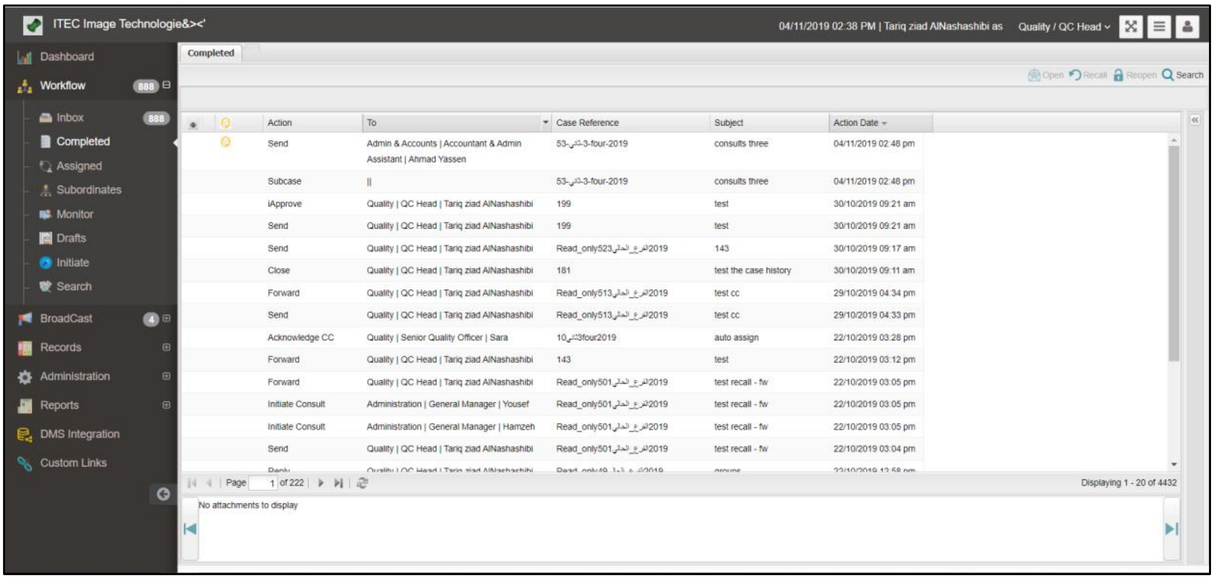


FIGURE 53: COMPLETED CASES PAGE

• All your completed cases (the cases that you have initiated, consulted, replied on consult, replied, forwarded, replied to all, acknowledged, sub-cased, iApprove, and closed) will be displayed.

• You can recall the cases which you have sent/forwarded/replied/replied to all, replied on consult, consult, by selecting the case then clicking Recall button at the upper right side of the page.

• A recall action will be logged in the case history.

• The Recalled case for the send action will be retrieved in the drafts page, please refer to the drafts section to more details 3.9. Handling your Drafts Cases.

Notes:

In case any of the CC / CCC recipients has acknowledged the case and the case has been recalled by the sender, then the acknowledge cc/ccc action will be removed from the completed page of the CC / CCC recipients.

○ The performer of iApprove action can't recall the iApprove action in case any of the CCC recipients' signs "Acknowledge CCC" the primary document.

○ You can reopen the cases that you have closed by selecting the case and clicking Reopen button.

• The Advanced Search feature allows you to define search criteria and helps you to search on cases with special factor, such as (case subject, to, case reference, action type, workflow type, workflow category, action date from and to) Actually, the Advanced Search feature can help the user custom it's search criteria and make searching easily.

10. How to use this function

From the Workflow → Completed page

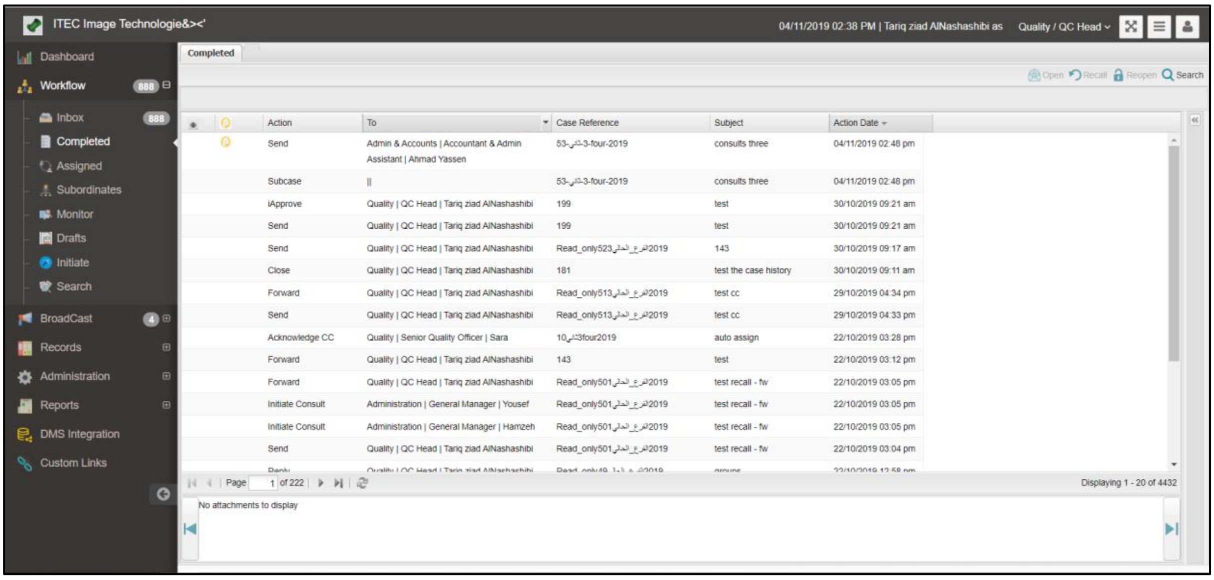


FIGURE 54: COMPLETED CASES PAGE - SEARCH

Customizing Completed List

11. Objectives

If you need to display in “completed” tab some custom fields or displaying all of them for specific workflow type; this feature enables you to configure the Completed tab view by selecting the desired custom fields to be shown for each workflow type.

12. How to use the screens

1. Using the workflow dropdown, select any workflow type then click on "Search "button.
2. Click  button in “Inbox” tab, as shown below:

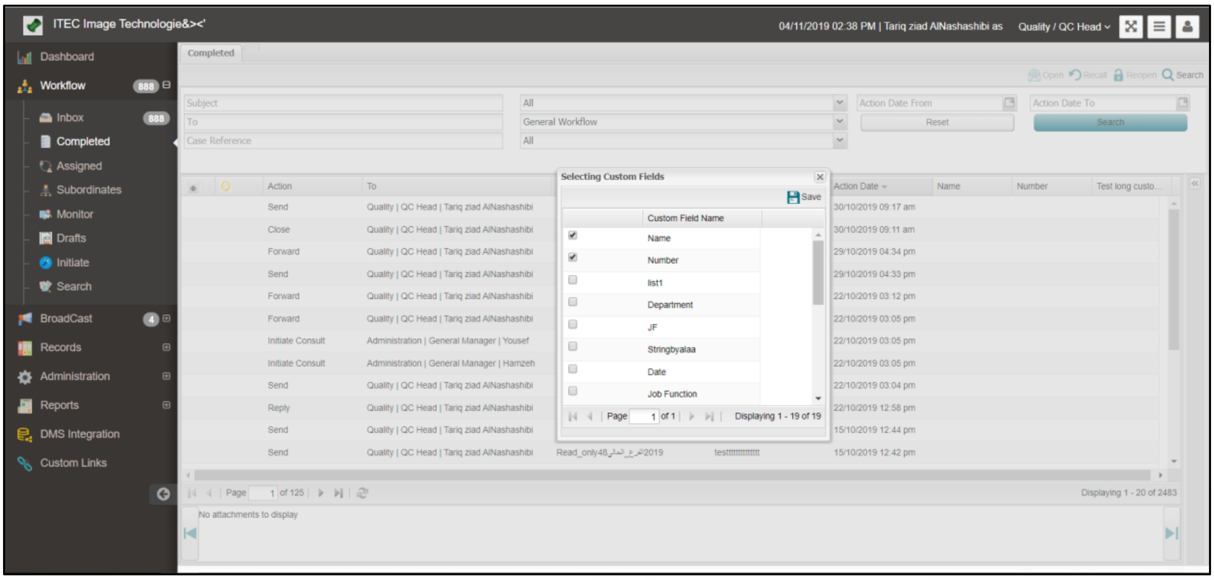


FIGURE 55: COMPLETED TAB

3. The popup window will look as shown below:
    - All custom fields are displayed for the selected workflow type except custom fields of type rich text and attachments.
    - Checkbox will be displayed beside every custom field.
    - Default value for the checkbox is unchecked.

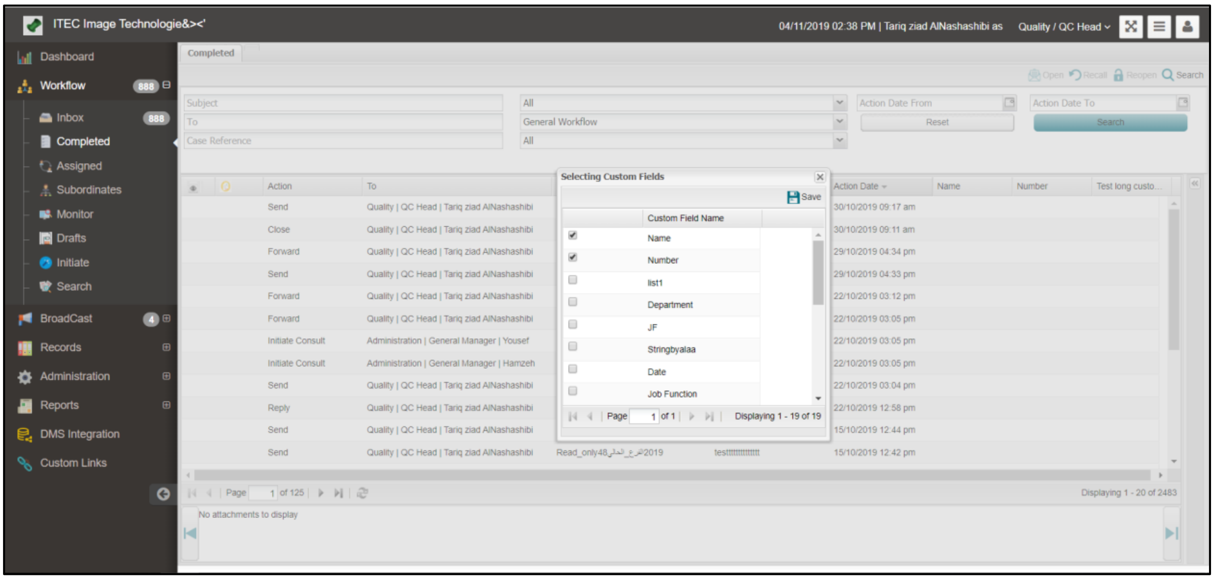


FIGURE 56: COMPLETED TAB - SELECTING FIELDS

Select which columns you would like to display in the completed tab by checking the checkbox corresponded to the desired custom field.

4. Click Save button to reflect the changes into "Inbox" tab.

→ Note that clicking Save applies the following actions:

- Close the popup window.
- Refresh the Completed tab.
- Display the selected custom fields in the completed grid.
- The extra fields will be displayed after the (Action Date) column.
- The selected custom fields will be saved for the workflow type and user. Whenever the user selects the workflow type from the workflow type dropdown for any assigned node, the selected custom fields will be displayed automatically.

5. You can use button to cancel the operation.

Handling your Assigned Cases

13. Objectives

The “Assigned” tab displays the workflow cases assigned from your inbox to other nodes. For more information about how to assign a workflow case, please refer to the “Assigning a Case” section (3.2.2.4).

14. How to use the screens

To check your assigned cases, please follow below steps:

1. Go to Workflow item in the navigator.
2. Click on Assigned sub tab, the following page will appear:

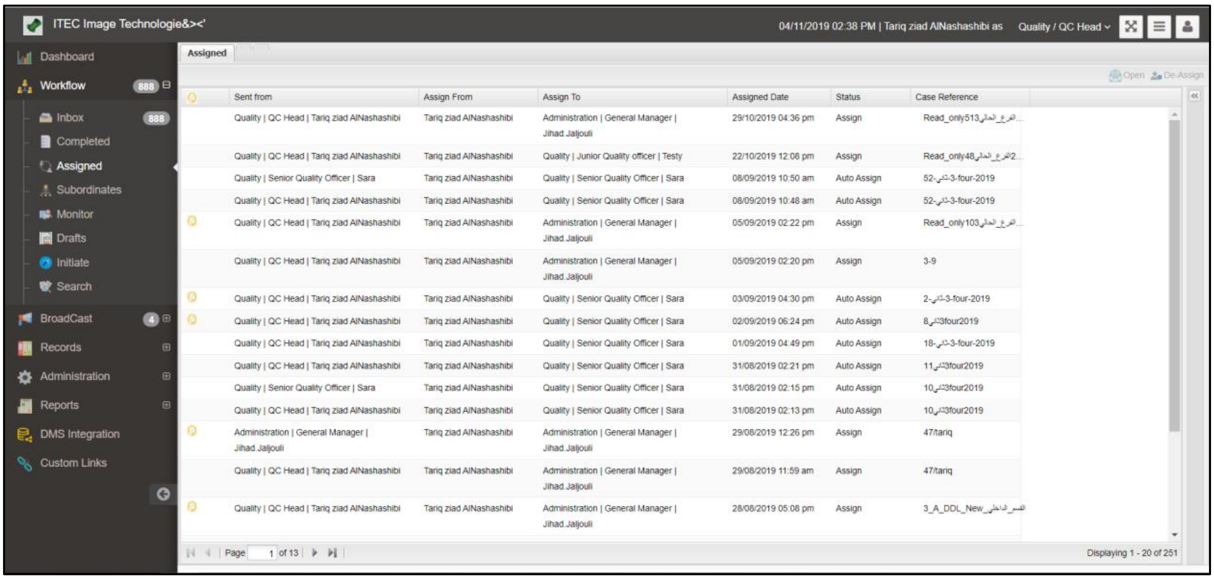


FIGURE 57: ASSIGNED PAGE

You'll find all the workflow cases that you have assigned to other nodes.

3. You can De-Assign the assigned workflow case using De-Assign button, and you can open the case using Open button.

Handling your Subordinates Cases

15. Objectives

The “Subordinates“ tab displays the workflow jobs (steps) that are currently available at the inboxes of your subordinates (nodes beneath you in the organization structure - one level down).

You will work on your subordinates‘ workflow jobs according to the privileges of your subordinates (not your privileges), this mean you will see the address book of your subordinate, and the actions buttons will be enabled/disabled according to the privileges of your subordinate as well. For the assign action, please refer to “Assigning a Case” section (3.2.2.4) above.

16. How to use the screens

To check your subordinates’ workflow cases, follow the below steps:

1. Go to Workflow item in the navigator.
2. Click “Subordinates” sub tab, the following page will appear:

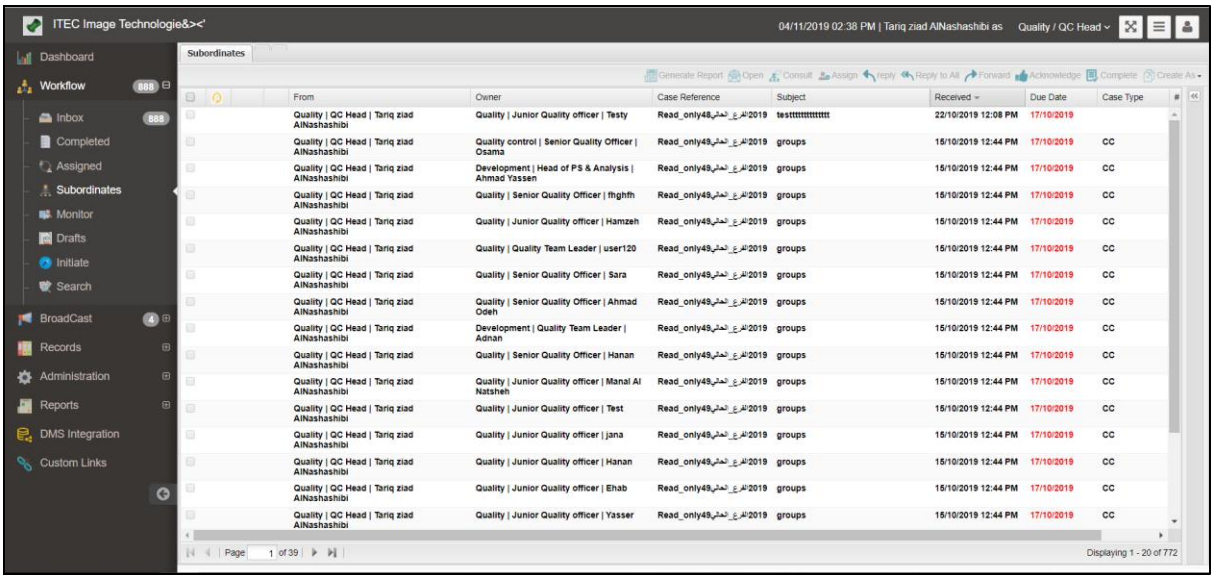


FIGURE 58: SUBORDINATES PAGE

→ All cases - currently available at your subordinates’ inboxes - will be displayed except the cases of type **committees** where the supervisor will not be able to see them. You can do all actions your subordinate can do on the case they received.

Handling your Drafts Cases

17. Objectives

A draft of the case can be saved in the initiation phase only through the initiate page, the main purpose of this feature is to give the initiator ability to save the case as draft, in order to edit it and send it later.

The case will be displayed in the “Drafts“ Page with status **Draft** for the drafts cases, and **recalled** for the recalled cases.

Through the drafts page the user can do one of the following actions:

- Edit the case
- Send the case
- Delete the case
- Close the Case

• The Clear action will be disabled in the drafts page.

• User can edit the draft cases and modify all fields (System and Custom).

18. How to use the screens

To save a case as draft, go to workflow initiate page, fill some case information and then click on Save Draft, as the below:

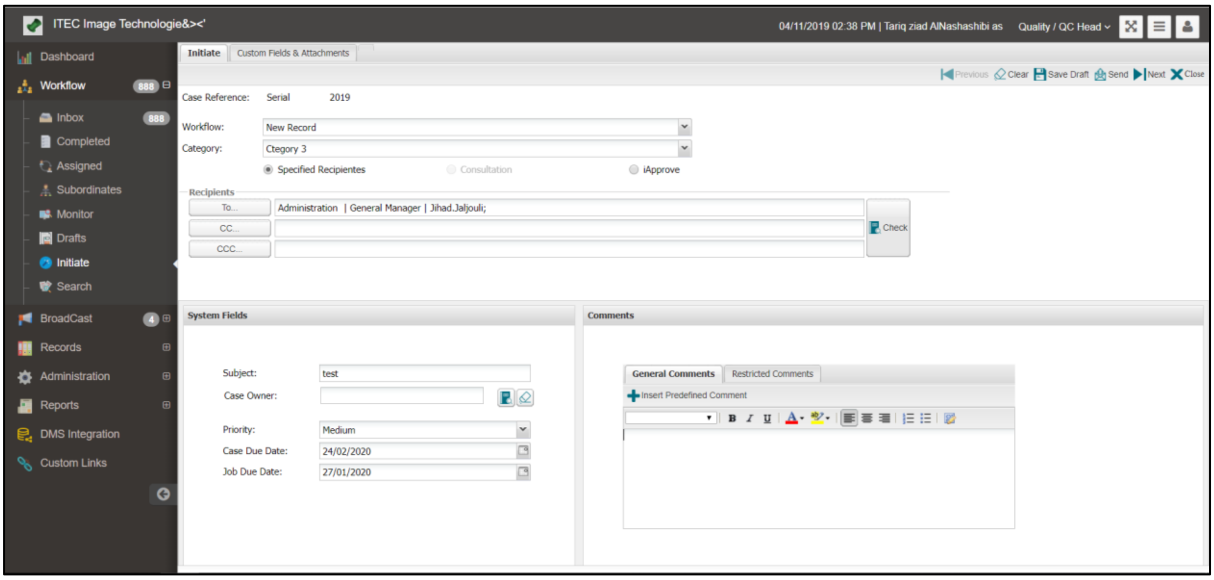
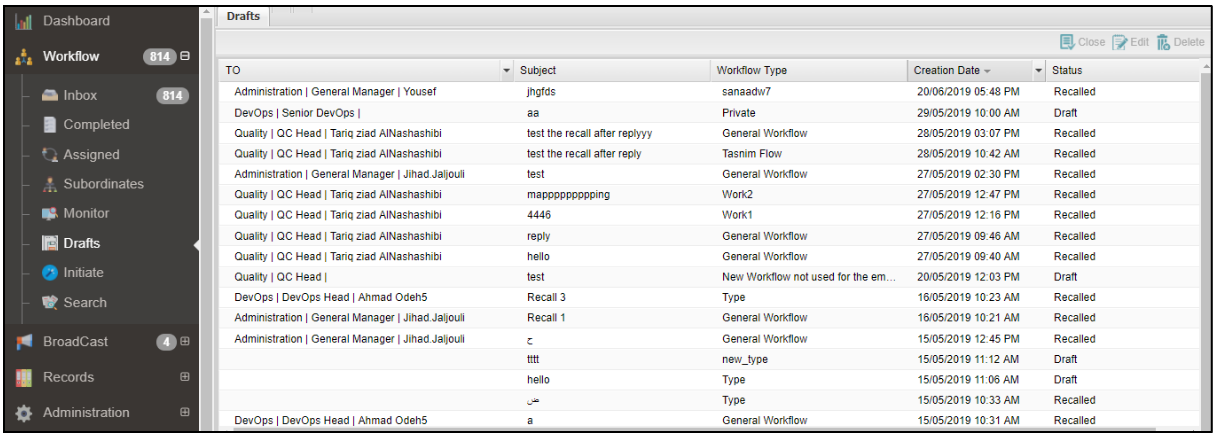


FIGURE 59: SAVING A CASE AS DRAFT

To check your drafts cases, follow the below steps:

1. Go to Workflow item in the navigator.
2. Click Drafts sub tab, the following page will appear



TO	Subject	Workflow Type	Creation Date	Status
Administration | General Manager | Yousef	jhgfds	sanaadw7	20/06/2019 05:48 PM	Recalled
DevOps | Senior DevOps |	aa	Private	29/05/2019 10:00 AM	Draft
Quality | QC Head | Tariq ziad AlNashashibi	test the recall after replyyy	General Workflow	28/05/2019 03:07 PM	Recalled
Quality | QC Head | Tariq ziad AlNashashibi	test the recall after reply	Tasnim Flow	28/05/2019 10:42 AM	Recalled
Administration | General Manager | Jihad.Jaljouli	test	General Workflow	27/05/2019 02:30 PM	Recalled
Quality | QC Head | Tariq ziad AlNashashibi	mappppppppping	Work2	27/05/2019 12:47 PM	Recalled
Quality | QC Head | Tariq ziad AlNashashibi	4446	Work1	27/05/2019 12:16 PM	Recalled
Quality | QC Head | Tariq ziad AlNashashibi	reply	General Workflow	27/05/2019 09:46 AM	Recalled
Quality | QC Head | Tariq ziad AlNashashibi	hello	General Workflow	27/05/2019 09:40 AM	Recalled
Quality | QC Head |	test	New Workflow not used for the em...	20/05/2019 12:03 PM	Draft
DevOps | DevOps Head | Ahmad Odeh5	Recall 3	Type	16/05/2019 10:23 AM	Recalled
Administration | General Manager | Jihad.Jaljouli	Recall 1	General Workflow	16/05/2019 10:21 AM	Recalled
Administration | General Manager | Jihad.Jaljouli	ج	General Workflow	15/05/2019 12:45 PM	Recalled
	tttt	new_type	15/05/2019 11:12 AM	Draft
	hello	Type	15/05/2019 11:06 AM	Draft
	ض	Type	15/05/2019 10:33 AM	Recalled
DevOps | DevOps Head | Ahmad Odeh5	a	General Workflow	15/05/2019 10:31 AM	Recalled

FIGURE 60: DRAFTS PAGE

3. You can find the draft and recalled cases, you can do the following actions (Edit and Delete) if the case status was as draft, and the following actions (Close and Edit) if the case status was recalled. Once the user is click on Edit action, the initiate page will be displayed.

Search for Cases

19. Objectives

You can search for your workflow cases (available in your Inbox and/or Completed tab) and also for your subordinates' cases (available in Inboxes and/or Completed tabs of your subordinates).
The search fields for the search process are: Case Reference, Workflow Type, Category, Case Due Date (From/To), Creation Date (From/To), Priority, Subject, Linked Object Reference Number, Status, Search In (All/Inbox/Completed), From (sender node), and Subordinates.

20. How to use the screens

To search for workflow cases, follow the below steps:

1. Go to Workflow item in the navigator.
2. Click "Search" tab, the following page will appear:

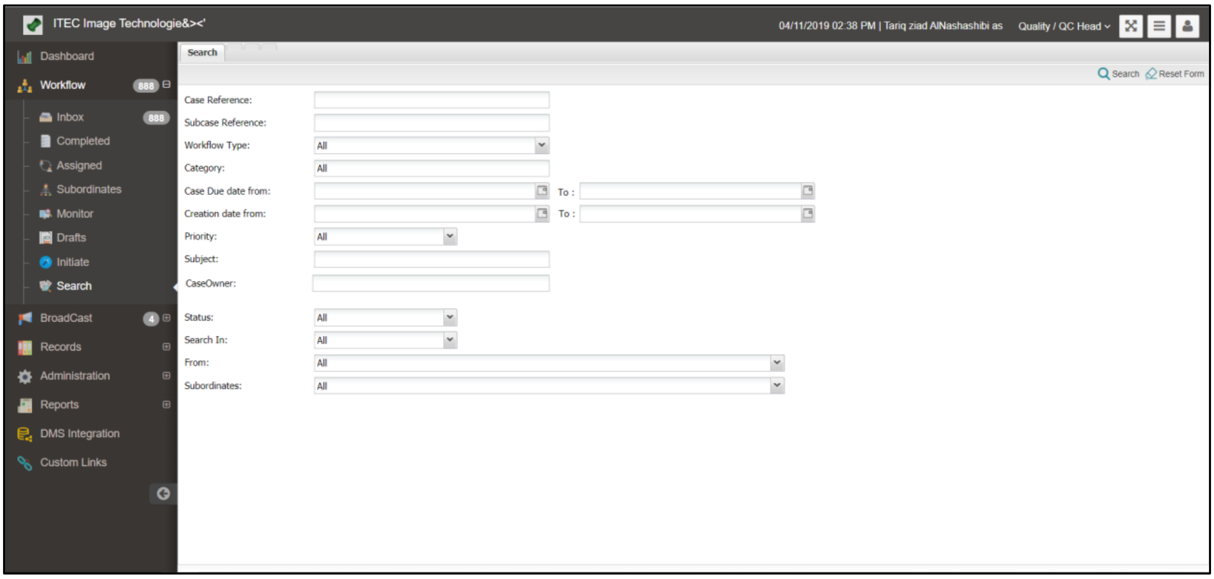


Figure 61: Search Page

Fill your search criteria and click Search button.

3. A list will be displayed based on your search criteria as shown in the page below:

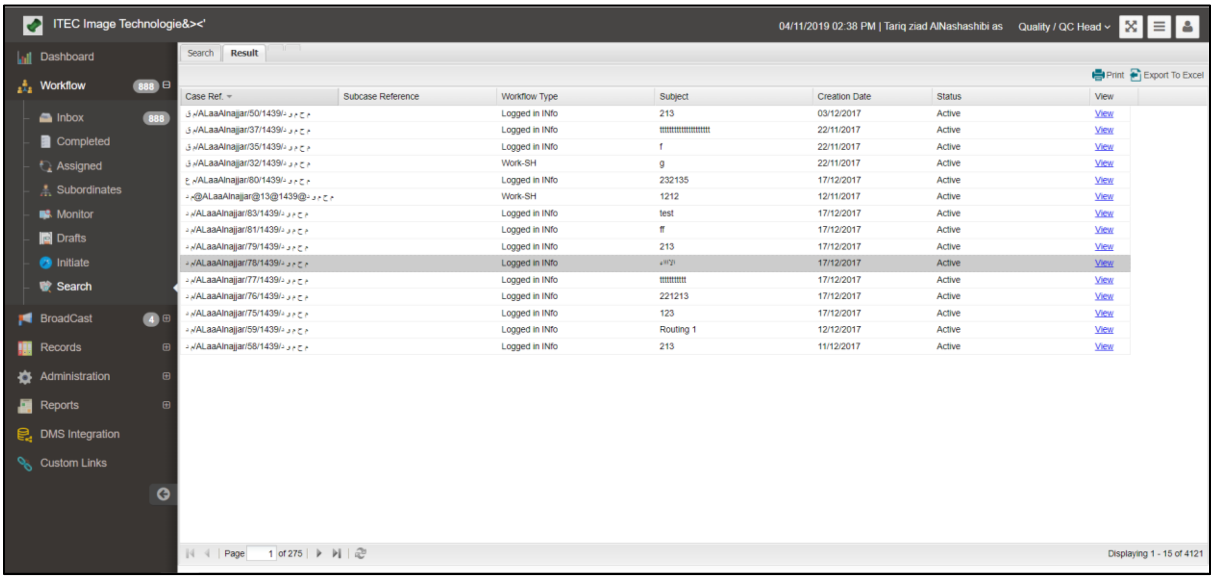


Figure 62: Search Page - Result Tab

You can view a workflow case using the View link corresponded to each case in the result list above. And You can print your search result using the 

button.

Broadcast

DocuTRAK broadcast module simulates the organization processes on managing and dealing with broadcasts, and follow-up the broadcasts while maintaining information on each transaction.

In Broadcast Module, users are divided into 2 categories:

1. **System users**: A normal users that can operate on the module to perform the following tasks:
   a. View a received broadcast.
   b. Request help on a received broadcast.
   c. Acknowledge/Accept a received broadcast.
2. **Privileged users**: Users with rights to perform the followings:
   a. Initiate Broadcasts.
   b. Track Broadcasts: Full Search for Broadcasts.
   c. DMS Integration.

There are 6 parts for the broadcast module:

1. Inbox: All new broadcasts that you received and still require your action (acknowledge/accept).
2. Initiate: Driven interface where you can send a new broadcast to the recipients.
3. Library: Where all your acknowledged/accepted broadcasts are saved.
4. Monitor: Where you can view details regarding your initiated broadcasts. If you have “Tracking” privilege, you will also be able to view all broadcasts initiated within the organization.
5. Search: Where you can search for broadcasts available in your inbox and library.

6. Tracking: Where you can search for the entire organization broadcasts. The objective of tracking is to conduct a full search to track the recipients' reactions on each broadcast sent out to them. Also, if you have "Initiate" privilege on a specific broadcast, then the second objective is to do some actions (Terminate and Archive) that broadcast.

Initiating a broadcast

22. Objectives

To initiate a broadcast, you will specify the recipient type to set whether the broadcast will be sent to internal or external users if the broadcast is selected to be sent for internal users you will choose one of the following view modes from the address book:

1. All: Entire Organization (with exception to shared nodes).
2. OS: Lists of all nodes within the organization ordered by job function in an ascending alphabetical order.
3. Departments: Lists all departments in the organization ordered by department name in an ascending alphabetical order.
4. OS Tree: Lists a tree of all nodes within the organization. The expanded option will be the department of the logged-in node.
5. Groups: lists of all groups within the organization that are defined by the admin, you can use them to send broadcast by selecting the group instead of selecting each node separately.

   If the broadcast is selected to be sent to external users, you will choose one of the following view modes from the address book:

   1. External users: to set the number of external users to receive the broadcast
   2. Categories: to send the broadcast to a group of external users sharing the same category
   3. All external users: to send the broadcast to all external users.

   Broadcast fields include:

1. Case Reference: Filled automatically generated by the system once you initiate a broadcast. Its value depends on the broadcast schema that had been configured by system admin.
2. System fields:
   a. Broadcast Type.
   b. Broadcast Subject.
   c. Priority: based on the selected broadcast type.
   d. Due Period (in Days): The period during which broadcast recipients are supposed to acknowledge/accept the broadcast. Once that period is over, the acceptance/ acknowledgement will expire, but recipients will still be able to acknowledge/ accept that broadcast.
   e. Valid Until: the date of which the broadcast content is valid.
   f. Group: Information or Regulation.
   g. Folder: the folder that will hold the broadcast.
3. Custom fields: based on the selected broadcast type.
4. The "Logged-in user's information" custom field: Includes the options: Department, Job Function, and Username.

→ If the “Logged-in user’s information” custom field is assigned to a broadcast type, then when creating a new broadcast these fields will be populated with the logged in node information.

5. Comments and Attachments tab.
    - Attached files: [Scan, files from DMS, Templates, System Files, and Linked Cases].
    - You can add comments for all broadcast recipients.

23. How to use the screens

To initiate a broadcast, follow the below steps:

1. Navigate to Broadcast item in the navigator to view broadcasts sub system.
2. Click on Initiate sub tab, the following page will appear:

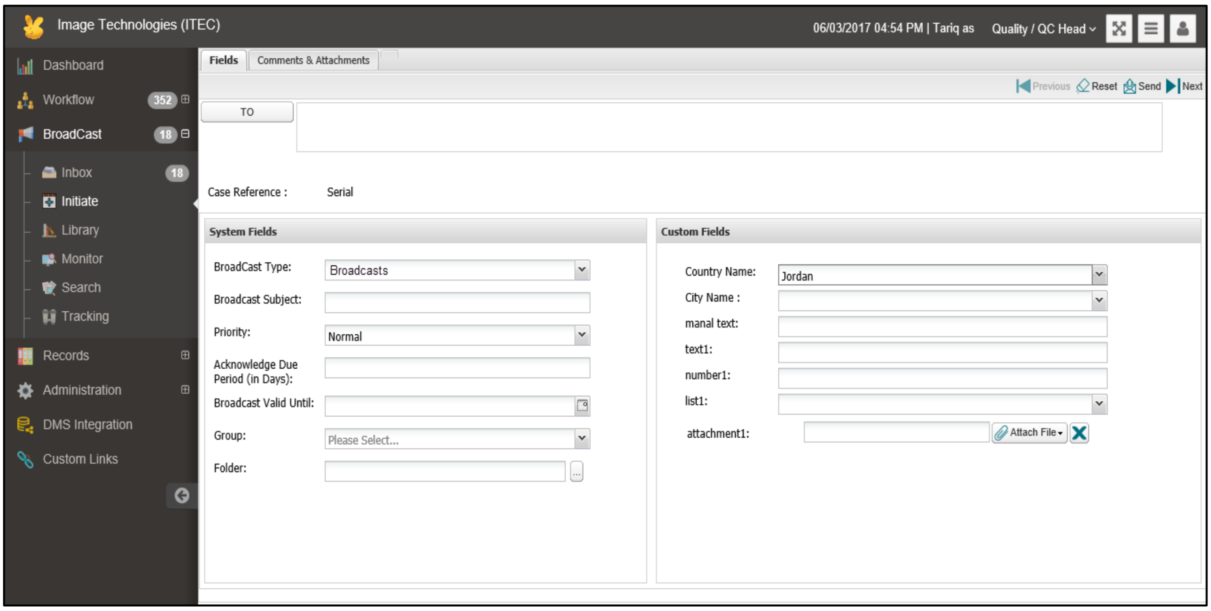
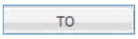


Figure 63: Initiate Broadcast Page

24. Defining the recipients of a broadcast

To choose the recipients of a broadcast, follow the below steps:

1. Click 

button to display the following popup:

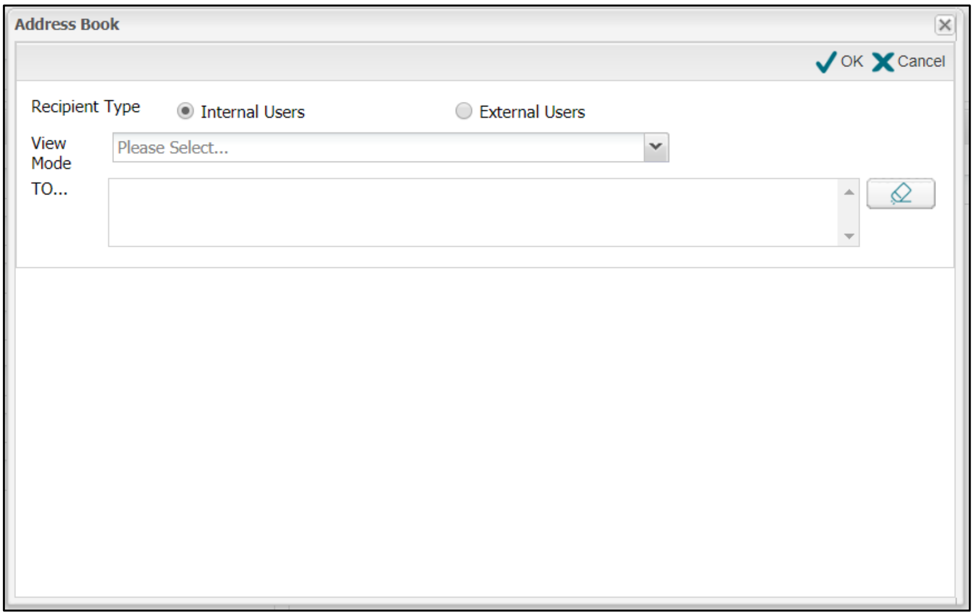


FIGURE 64: ADDRESS BOOK

2. Select the view mode for the broadcast recipients from the relevant menu, the following four choices are available:
   - ALL: Sends the broadcast to the entire organization.
   - Departments: Sends the broadcast to an entire department.
   - OS: Views a list of all nodes defined in the organization. You can select one or more node from the list.
   - OS Tree: Views a tree of all nodes within the organization. You can select one or more node from the tree.
   - Groups: lists of all groups within the organization that are defined by the admin, you can use them to send broadcast by selecting the group instead of selecting each node separately.
3. To select the recipients (nodes which you want to send them a broadcast); place the cursor at the "To…" text field and double click on the desired node, the clicked node will appear inside the field.
4. Click OK button to accept the recipient(s) you have chosen or Cancel to cancel the operation.
5. To reset the fields and clear its contents, click Reset button.

25. Inserting the broadcast details

- To insert the broadcast details into the broadcast's fields, follow the below steps:
- Fill any required fields (if any) for the case reference.
- Fill any available data in the system fields.
- Fill number of days for the "Due Period".
- You can set a date for the "Valid Until" field using a calendar control beside that field.
- Define the group of the broadcast using the "Group" list: either "Regulation" or "Information".

- Define the folder that will contain the broadcast using a browse button ... beside the "Folder" field.
- Fill any available data in the Custom Fields (if any).

26. Adding Comments and Attachments to a Broadcast

Attach documents, templates, cases and records using the attachments list in "Comments & Attachments" tab, you can view that tab either by clicking on it directly, or by clicking Next button on the right bottom side of the "Fields" tab.

To go back to "Fields" tab, click Previous button. The attachments list expands by clicking on it, as shown below:

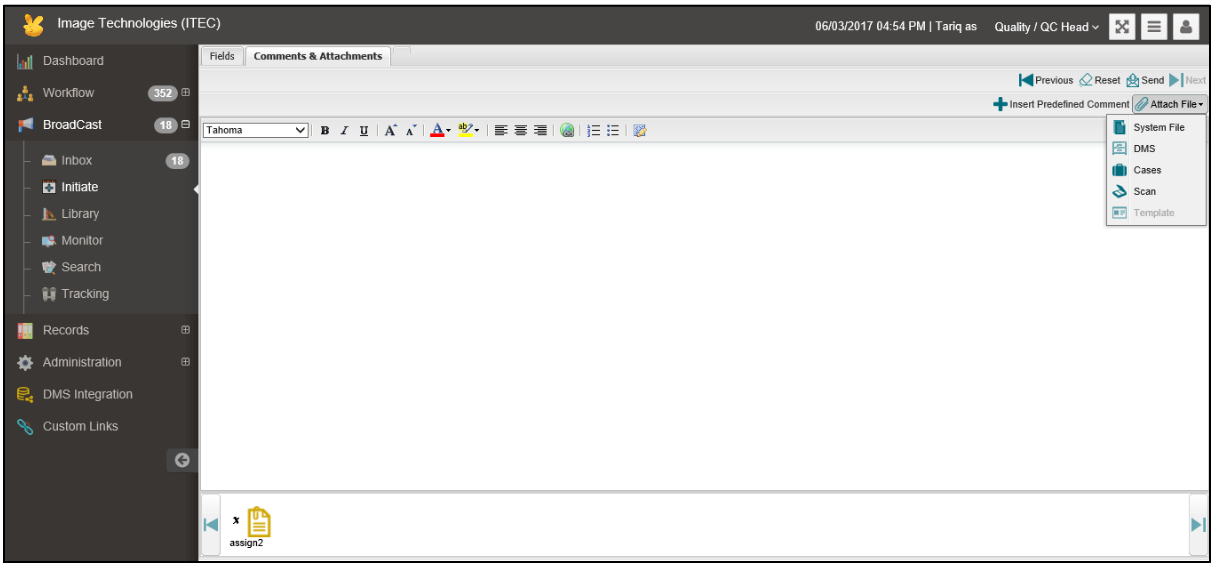


FIGURE 65: INITIATE PAGE – COMMENTS & ATTACHMENTS TAB

Tips

– For more information on how to attach files to a broadcast, refer to the "Attachments" in the section of "Workflow" above.

– For more information on inserting predefined comments, refer to the "Adding Predefined Comments to a Case" section in Workflow Module above, and to know how to define predefined comments, refer to "Add your Predefined Comments" in "User Preferences" section below.

→ After filling all the desired fields, attachments, comments to the broadcast, click Send button at the bottom side of the screen, to send the broadcast for the selected recipients.

Handling your Broadcast Inbox

27. Objectives

Your broadcasts Inbox shows the broadcasts you have received in the Regulation or Information group. You will be able to accept the regulations while you will be able to acknowledge the information broadcasts.

- You can perform the following commands on the received broadcast at your inbox:

1. Acknowledge/Accept the broadcast
2. Print the broadcast
3. Sending a Help Request to the broadcast initiator
4. View the broadcast attachments

– New broadcasts are shown in **Bold** style in your inbox, “received” & “subject” fields indicate that you didn’t view the broadcast till now.

– Broadcasts with help requests or help replies are indicated as below:
  1. Red sign of “**?**” indicates that there is a help response sent from the broadcast initiator to you.
  2. Blue sign of “**?**” indicates that a help request sent from you to the broadcast initiator.

– Overdue broadcasts “received”, and “subject” fields are shown in Red.

– Terminated broadcasts are shown with the icon to indicate that this broadcast was terminated.

– Acknowledging a broadcast is confirming that you read the broadcast.

– Accepting a broadcast is confirming that you accept the regulation written in the broadcast. When you try to acknowledge/accept the broadcast, the system will validate that you opened at least one attachment, otherwise the system will display a message that says: “Please open at least one attachment before you acknowledge/ accept the broadcast”.

– Once you acknowledge / accept a broadcast, it will be hidden from your broadcast inbox and displayed in your library.

– You can send a help request to the broadcast initiator for Active broadcasts only.

– You can view all the help conversations (occurred between you and the initiator) for any broadcast at your inbox.

– The broadcast initiator will be notified via email/popup/SMS (according to your preferences) once you send your help request to them.

– You will be notified via email/popup/SMS (according to your preferences) once the broadcast initiator replied to your help request.

– When a broadcast is sent to a department, new employees added later to this department will receive all Active broadcasts. This is applied also to broadcasts sent to “All”.

– When the user’s department is changed:

1. They will receive in their inbox all active broadcasts of the new department.

2. Their old broadcasts will still be available in their inbox.

– You can view all attachments and linked objects associated with the broadcast.

– You can print the broadcast and/or any attachment associated with it.

28. How to use the screens

To check your broadcasts Inbox, follow the below steps:

1. Go to Broadcast in the navigator.
2. Click Inbox sub tab to view a list of broadcasts that you have received.
3. Select the broadcast you want to handle.
4. The broadcast details will appear in "Details" tab as shown below:

FIGURE 66: INBOX PAGE – DETAILS TAB

5. You can print out the broadcast details using  button at the right bottom side of the screen.

6. The broadcast's attachments appear in the attachments panel at the bottom side of the screen. To view the attachment, you can click on the attachment icon.

7. To accept the regulation broadcasts you have received, you can click  button at the right bottom side of the screen, so the accepted broadcast will be transferred to your library

8. To acknowledge the information broadcasts you have received, you can click  button at the right bottom of the screen. The acknowledged broadcast will be moved to your library.

Figure 67: Details Tab – Information Broadcast

9. In your Inbox, you can request help for the received broadcast by opening the "Help Request" tab.

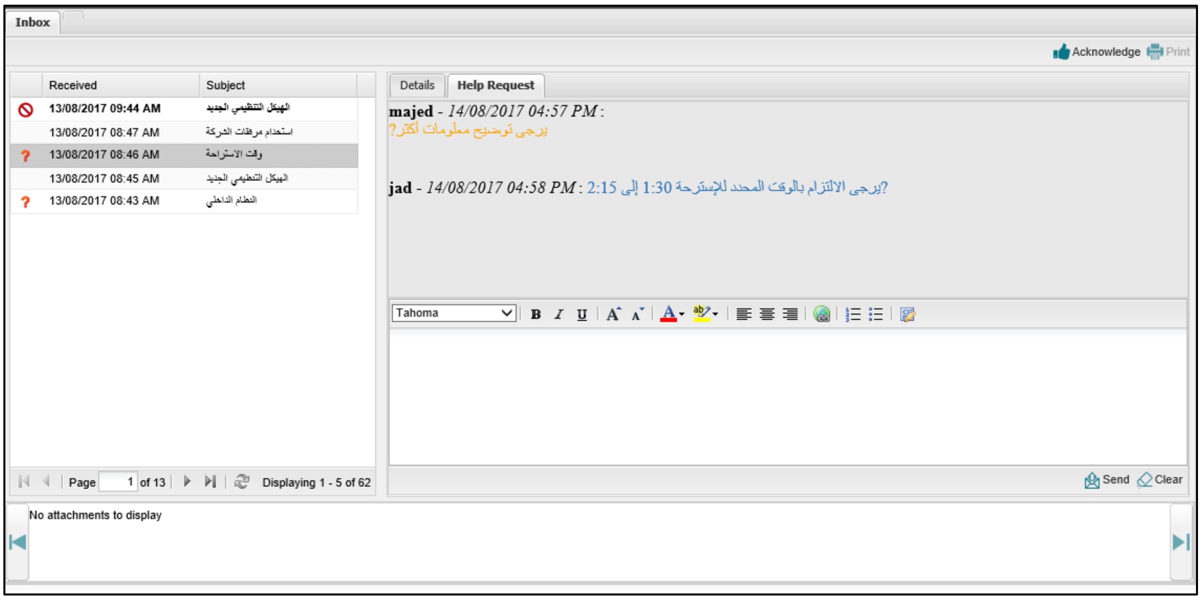


Figure 68: Inbox Page – Help Request Tab

a. Write your help request in the writing area.
b. Click Send button to send your help request to the broadcast initiator.
c. Your help request will appear within the “Help Requests” tab, and a blue question mark “**?**” will appear next to the broadcast, as shown below:

FIGURE 69: HELP REQUEST TAB – SENDING A HELP REQUEST

d. You can use Clear button any time to clear the text you have written in the writing area.

e. Once the broadcast initiator responds to your help request, a red question mark "?" will appear next to your received broadcast, and their help response will appear within the "Help Request" tab, as shown below:

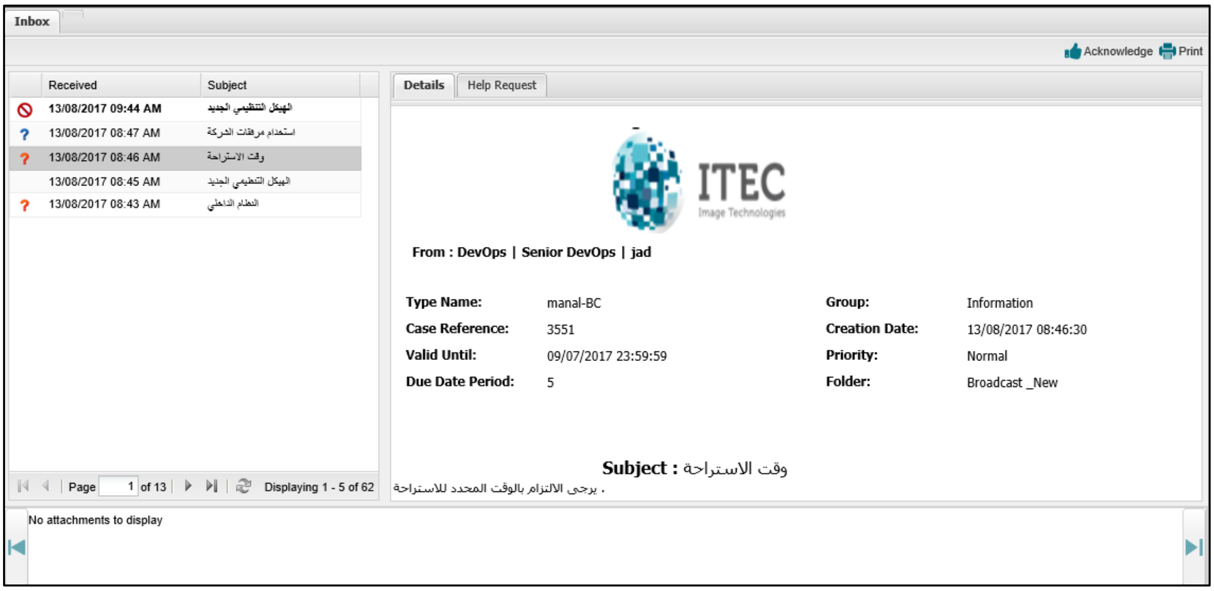


FIGURE 70: HELP REQUEST TAB – HELP RESPONSE

Broadcast Library

29. Objectives

After taking the required action on your broadcast either accepting or acknowledging; your broadcast will be transferred from your inbox to your library. In your library, you'll be able to perform the below actions on the broadcasts as described below:

- Your library will display all your acknowledged/accepted broadcasts even if you are not currently assigned to the broadcast's related node/department. The library displays only the broadcasts that are still not archived.
- Your library is classified to two folders (Active, and Inactive):
  1. **Active** folder: Contains your acknowledged / accepted broadcasts that have not exceeded their due date and are not been terminated.
  2. **Inactive** folder contains:
  - Your acknowledged/accepted broadcasts that have exceeded their due date.
  - Your acknowledged/accepted broadcasts that have been terminated. For terminating a broadcast, please refer to "Monitor" section and "Tracking" section below.
- In both "Active" and "Inactive" folders, the broadcasts are grouped into "Information" and "Regulation" folders:
  1. **Information**: The information broadcast is a kind of informative letter to tell employees about a certain type of information related to the organization (like: holidays, work structure, work allocation, …etc.).
  2. **Regulation**: The regulation broadcast is a rule of the organization that should be followed by employees (like: working hours, personal leaves, business leaves, how to apply for planned vacations, new working rules, …etc.).
- In both of the "Information" and "Regulation" folders, broadcasts are available within sub-folders:
  1. The name and position of the sub-folder were defined by administrator.
  2. The tree leaf represents a broadcast.
- You can perform the following actions on the broadcasts at your library:
  1. View the broadcast details.
  2. View the broadcast attachments.
  3. Send help requests to the broadcast initiator.
  4. Print the broadcast details.
  5. Archive the broadcast.
- You can archive only those broadcasts on which you have "Initiate" privilege. Archiving a broadcast, means: Broadcast will be removed from "Monitor" section. And from your

library and libraries of all broadcast recipients, but it will NOT be removed from the inboxes of broadcast recipients.

30. How to use the screens

To Check your library, follow the below steps:

1. Go to Broadcast item in the navigator.
2. Click on library sub item to view the broadcasts which you acknowledged/accepted, as shown below:

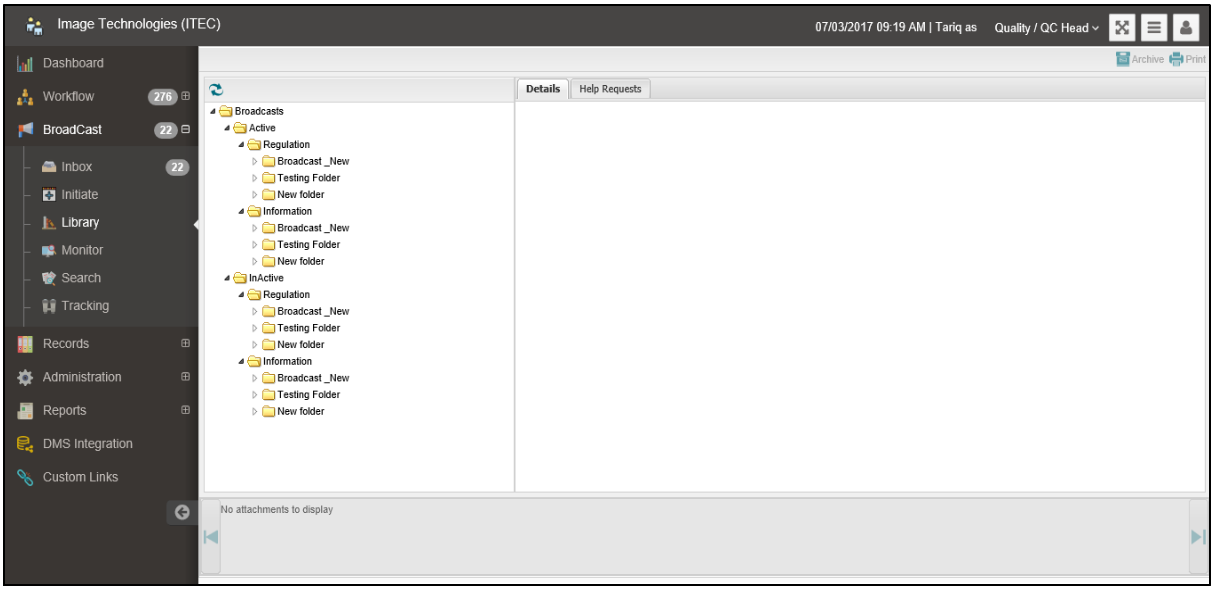


FIGURE 71: LIBRARY TAB

3. Navigate through the tree view to reach the broadcast you want, then select it to show its content, as shown below:

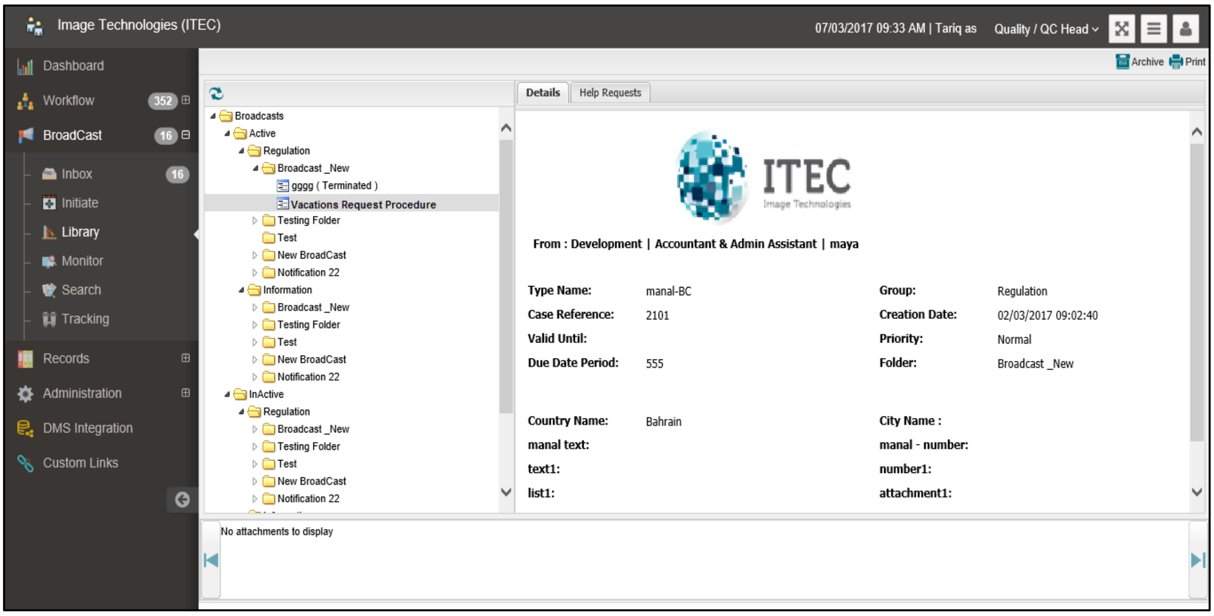


FIGURE 72: LIBRARY TAB – VIEWING BROADCASTS

4. You can review the broadcast details, view the broadcast attachments from attachments panel, and print the broadcast's details by clicking  button.
5. You can send a help request to the broadcast initiator. Steps of sending help requests through library tab will be same as steps of sending help requests through inbox tab. For more information about sending help requests, please refer "Handling your Broadcast Inbox" section above.
6. You can archive the broadcast by clicking  button:
   - The system will display a confirmation message that says: "The selected broadcast will be archived, are you sure?".
   - Click "OK" button to archive.
   - The following message will be shown:

7. The archived broadcast will be removed from the library, and then you'll be able to view the archived broadcast via "User Search" and "Tracking".
8. You can use refresh  button to refresh your library list.

Broadcast Monitor

31. Objectives

By default, you'll be able to monitor the broadcasts you have initiated, but if you have the "Tracking" privilege, then you will also be able to monitor the broadcasts initiated by others.

- Your monitor section is classified into two folders (Active and Inactive):
  1. **Active** folder: Contains initiated broadcasts that have NOT exceeded their due date and have NOT been terminated.
  2. **Inactive** folder contains:
     - o Initiated broadcasts that have exceeded their due date.
     - o Imitated broadcasts that have been terminated.

- Inside both "Active" and "Inactive" folders, the broadcasts are grouped into "Information" and "Regulation" folders:

1. **Information**: The information broadcast is a kind of informative letter to tell employees about a certain type of information related to the organization (like: holidays, work structure, work allocation, etc.).
2. **Regulation**: The regulation broadcast is a rule of the organization that should be followed by employees (like: working hours, personal leaves, business leaves, how to apply for planned vacations, new working rules, … etc.).

- Inside both the "Information" and "Regulation" folders, broadcasts are available within sub-folders:
  1. The name and position of the sub-folder were defined by administrator.
  2. The tree leaf represents a broadcast.

- For the selected sub-folder**,** you can apply the followings:
  1. You can view its **statistics** as pie charts.
  2. You can print its statistics.

o "***Acknowledgement***" Pie chart:

1. Percentage of recipients acknowledged/accepted broadcasts of this folder.
2. Percentage of recipients who did NOT acknowledge/accept broadcasts of this folder.

o "***Help Requests***" Pie chart:

1. Percentage of help requests - of this folder - that have been replied.
2. Percentage of help requests - of this folder - that have NOT been replied so far.

- For a selected **broadcast,** you can apply the followings:
  1. You can view the followings:
     - o Statistics
     - o Details
     - o Help requests
     - o Recipients
     - o History
     - o Attachments

2. You can view the **statistics** of the broadcast as pie charts:

   - “***Status***” Pie chart:

1. Percentage (along with the actual number) of recipients acknowledged/accepted the broadcast.
2. Percentage (along with the actual number) of recipients who have NOT acknowledged/accepted the broadcast so far.
3. The total number of receivers will show the actual number of broadcast receivers for each sector between two brackets

   - “***Adherence***” Pie chart:

1. Percentage (along with the actual number) of recipients acknowledged/accepted the broadcast before/on “Due period (in days)”.
2. Percentage (along with the actual number) of recipients who acknowledged/accepted the broadcast after “Due period (in days)”.

3. You can view a list of help requests that you have received from broadcast recipients.

4. Once you select a help request, you will see the conversations held between you and help requester:
   - You can also reply to the help requester. Once you reply, they will receive a message via email/popup/SMS (according to their user preferences).
   - The help requester can also reply to you, once they reply, you will be notified via email/popup/SMS (according to your user preferences).

5. You can display a list of all recipients who received the broadcast, via two columns:
   - To: The node that received the broadcast.
   - Acknowledged at: The date at which the broadcast was acknowledged.

6. You can view the broadcast history including:
   - Performer: Who performed the action on the broadcast.
   - Action: The action performed by the performer:
     [Initiate – Acknowledge – Accept – Terminate – Archive].

   - Date: The date and time at which the action was performed.
   - Notes: The notes (if any) written by the performer.

7. You can terminate ONLY those broadcasts on which you have “Initiate” privilege. You must write a termination reason to be able to terminate the broadcast. Terminating a broadcast means:
   - Broadcast will be moved from the “Active” folder to the “Inactive” folder in “Monitor” section.
   - Broadcast will be moved from the “Active” folder to the “Inactive” folder in your library (if the broadcast is available there) and in the libraries of all broadcast recipients as well, but it will NOT be removed from inboxes of recipients.

- Broadcast will be sent as a new broadcast to inboxes of all recipients with a “termination” icon that indicates that this broadcast was terminated, but the system will NOT remove the original broadcast from inboxes of recipients.
- DocuTRAK will send a message via email/popup/SMS to the broadcast recipients (according to their user preferences) to inform them that the broadcast was terminated and received in their inboxes.
- DocuTRAK will log your entered termination reason in the broadcast history.
- All broadcast recipients should acknowledge both:
    1. The original broadcast.
    2. The terminated broadcast.

8. You can archive the broadcasts on which you have “Initiate” privilege. Archiving a broadcast, meaning:
    - Broadcast will be removed from your library (if the broadcast was there) and from the libraries of all broadcast recipients as well.
    - Broadcast will be removed from “Monitor” section, but it will NOT be removed from inboxes of broadcast recipients.
    - You will be able to see the archived broadcast ONLY via:

1. Your Inbox: ONLY if you are one of the broadcast recipients and you have not acknowledged/ accepted the broadcast till now.
2. “User Search”: Please refer to “User Search” section below.
3. “Tracking”: This section will be viewed to you ONLY if you have tracking privilege. Please refer to “Tracking” section below.

9. You can print Statistics, Details, Recipients, and History.

32. How to use the screens

To monitor the broadcasts that have been initiated, please follow the below steps:

1. Go to Broadcast item in the navigator.
2. Click on Monitor sub tab to browse the initiated broadcasts; you'll find broadcasts classified in a tree view of folders in which broadcasts had been created, as shown below:

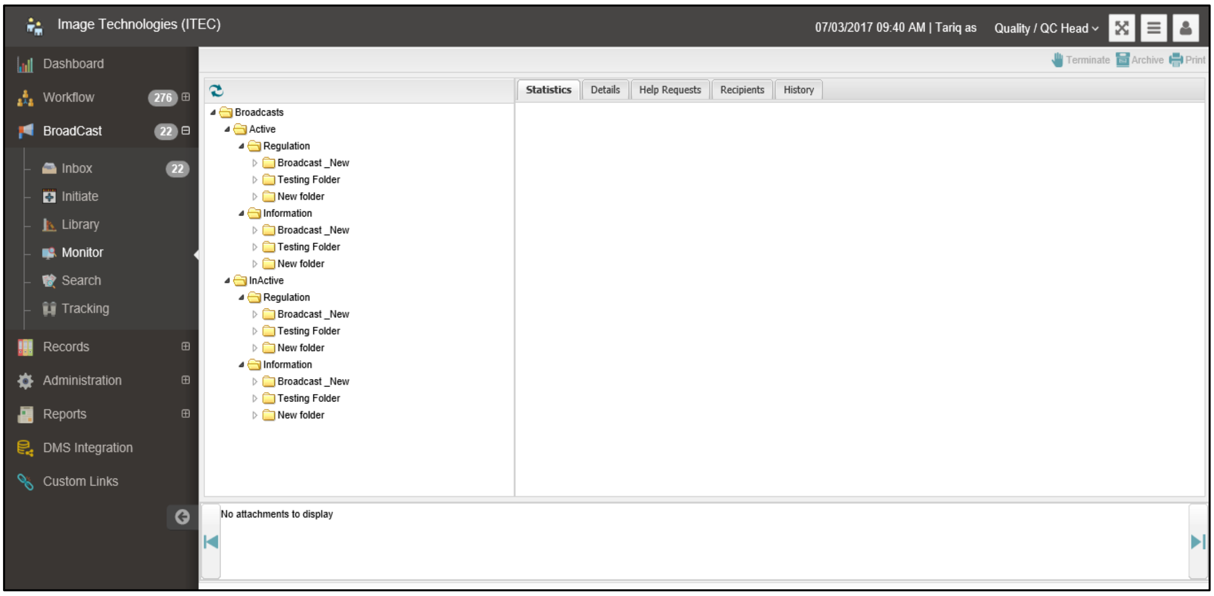


FIGURE 73: MONITOR TAB

TIP: A broadcast will be transferred to inactive folder only if the broadcast was terminated or the broadcast has exceeded its due date.

3. Once you selected a sub-folder from the tree view, the system will display the following tab which is called “Statistics” as displayed below:

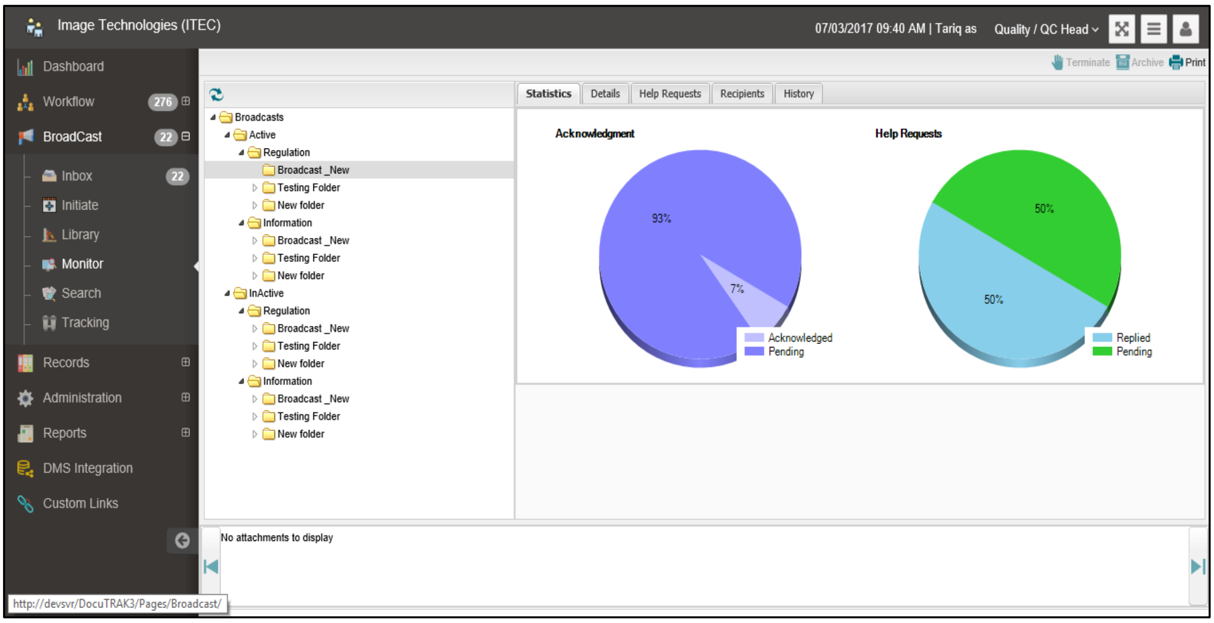


FIGURE 74:MONITOR – STATISTICS OF A SELECTED BROADCAST FOLDER

a. **Acknowledgement** pie chart shows the percentage of recipients who acknowledged/accepted broadcasts within this folder compared with the percentage of recipients who have NOT acknowledged/accepted the broadcasts till now.

b. **Help Requests** pie chart shows the percentage of replied help requests within this folder compared with the percentage of pending help requests (still waiting for reply).

4. Navigate through the tree view to reach the broadcast you want, then select it to view its information, as shown below:

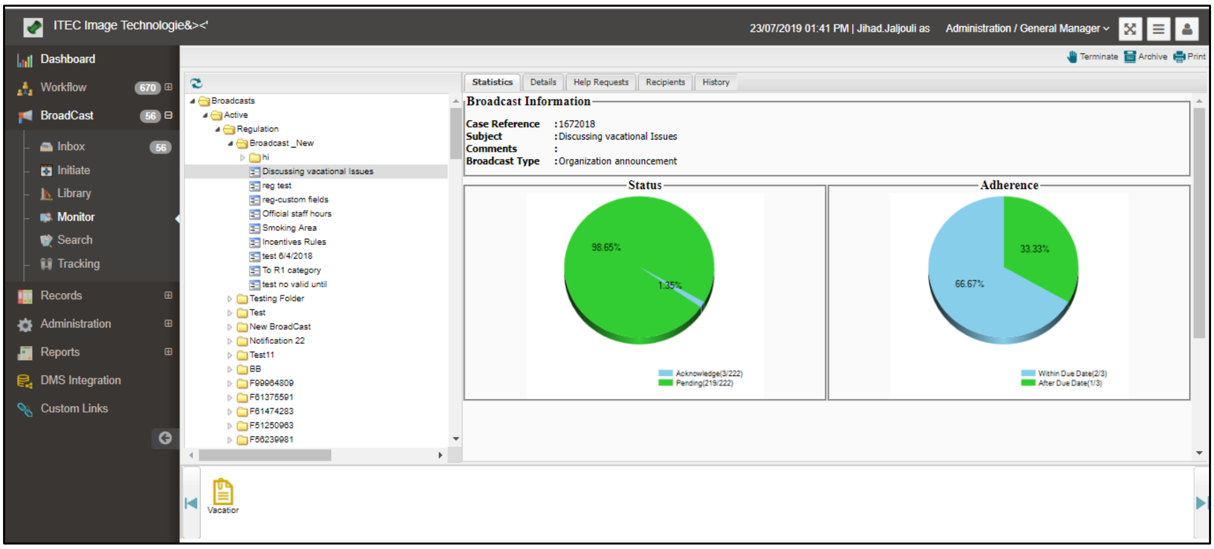


FIGURE 75: MONITOR– STATISTICS OF A SELECTED BROADCAST

5. You will see the broadcast statistics in the statistics tab, you can view the broadcast details from the details tab, check the recipients and history of a broadcast using the related tabs, view the broadcast attachments in attachments panel and print the broadcast's details by clicking Print button.
6. You'll be able to reply to a help request.
7. You'll be able to archive the broadcast by clicking Archive button:
   • The system will display a confirmation message that says: “The selected broadcast will be archived, are you sure?”
   • Click "OK" button to archive.
   • The following message will be shown:

   • The archived broadcast will be removed from "Monitor" tab, and then you'll be able to view the archived broadcast using “User Search” and "Tracking".

8. You'll be able to terminate the broadcast - if needed - by clicking button, the following popup will appear:

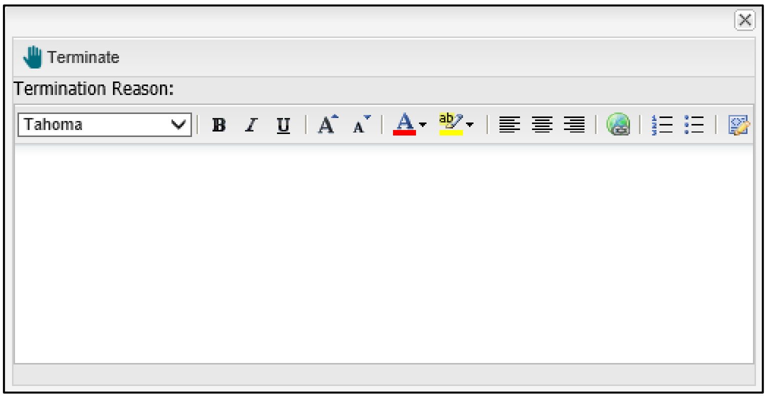


FIGURE 76: TERMINATION REASON

- Write the purpose of termination in the text area.
- Click button.
- System will display a confirmation message that says: “The selected broadcast will be terminated, are you sure?”
- Click "OK" button to terminate.
- The following message will be shown:

9. A termination icon will appear in recipients’ inboxes next to the terminated broadcast, also a termination stamp will appear in the broadcast's details, as shown below:

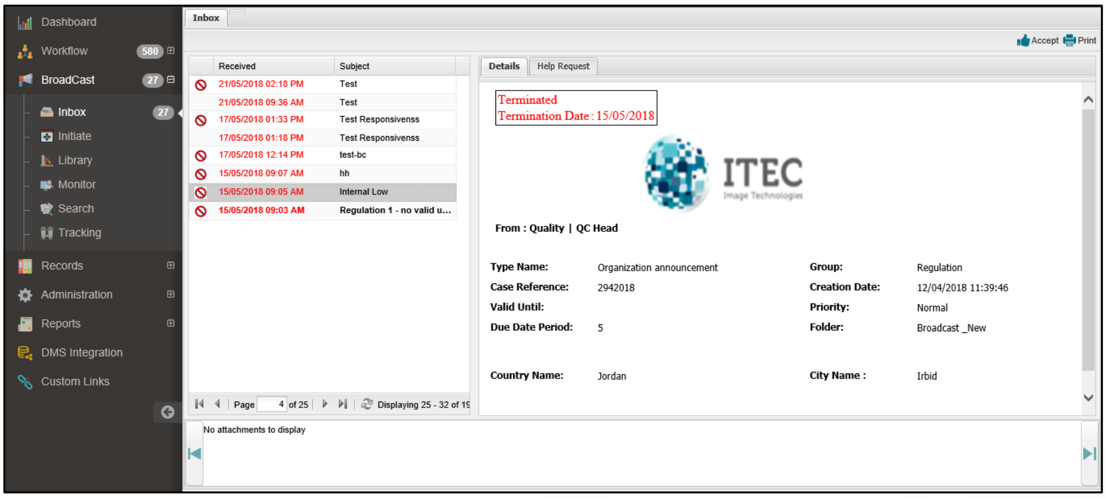


FIGURE 77: BROADCASTS INBOX – TERMINATED BROADCAST

10. You can use refresh button to refresh your broadcasts list.

Search for broadcasts

33. Objectives

By default, you can search for your own broadcasts (broadcasts available in your Inbox and Library).

– Through the **Search Tab** you can perform search by entering values in the following fields:

1. Broadcast Type: All broadcast types available in the system.
2. Source: [All / Not Archived / Archived].
3. Status: [All / Active / inactive: Terminated or Overdue "Expired"].
4. Received date (From – To): The date at which the broadcast was received by you.
5. Initiate date (From – To): The date at which the broadcast was initiated.
6. Priority: [All / Low / Normal / High].
7. Folder: The folder that contains the broadcast.
8. Case reference: The reference that is uniquely identifying the broadcasts within the same broadcast type.
9. Subject: The title of the broadcast that was determined by the broadcast initiator.
10. User Response: [All - Not Acknowledged/Not Accepted - Acknowledged/Accepted].
11. Group: [All / Information / Regulation].
12. Custom Fields of the selected broadcast type.

– **Result Tab** will display the broadcasts that matches the values you entered in the search tab. The result tab will display the following columns to show some information about the retrieved broadcasts:

1. Case Reference.
2. Subject.
3. From: The node that initiated the broadcast.
4. Initiated date: The date at which the broadcast was initiated.
5. Response Date (if there is a reply): The date at which you respond (acknowledged, accepted) to the broadcast.

– Through the Result Tab, you can open a broadcast by double clicking it, so it will be displayed to you in a separate tab:

1. You will see the details of the broadcast with its attachments.
2. You can open the attachments of the broadcast.

3. You can send help requests to the broadcast initiator:
   - Once you sent a help request, the broadcast initiator will receive a message via email/popup/SMS (according to their user preferences).
   - Once the broadcast initiator replied, you will receive a message via email/popup/SMS (according to your user preferences).
4. You can accept the received broadcast if it is related to the “Regulation” group or acknowledge it if it is related to the “Information” group.
5. When you try to acknowledge/accept the broadcast, the system will validate that you opened at least one attachment, otherwise the system will display a message that says: “Please open at least one attachment before you acknowledge/accept the broadcast”.
6. Once you acknowledge/accept the broadcast:
   - Broadcast will be removed from your inbox.
   - Broadcast will be moved to your Library. Please refer to the “Broadcast Library” section above.
7. You can archive ONLY those broadcasts on which you have “Initiate” privilege. Archiving a broadcast, meaning:
   - Broadcast will be removed from “Monitor” section. Please refer to “Broadcast Monitor” section above.
   - Broadcast will be removed from your library (if the broadcast was available there) and from libraries of all broadcast recipients as well, but it will NOT be removed from inboxes of broadcast recipients.
   - You will be able to see the archived broadcast only through: [Your Inbox / Search screen / Tracking screen].

34. How to use the screens

To search for those broadcasts available at your inbox and library, follow the below steps:

1. Go to “Broadcast” item in the navigator.
2. Click “Search” sub item, the following page will appear:

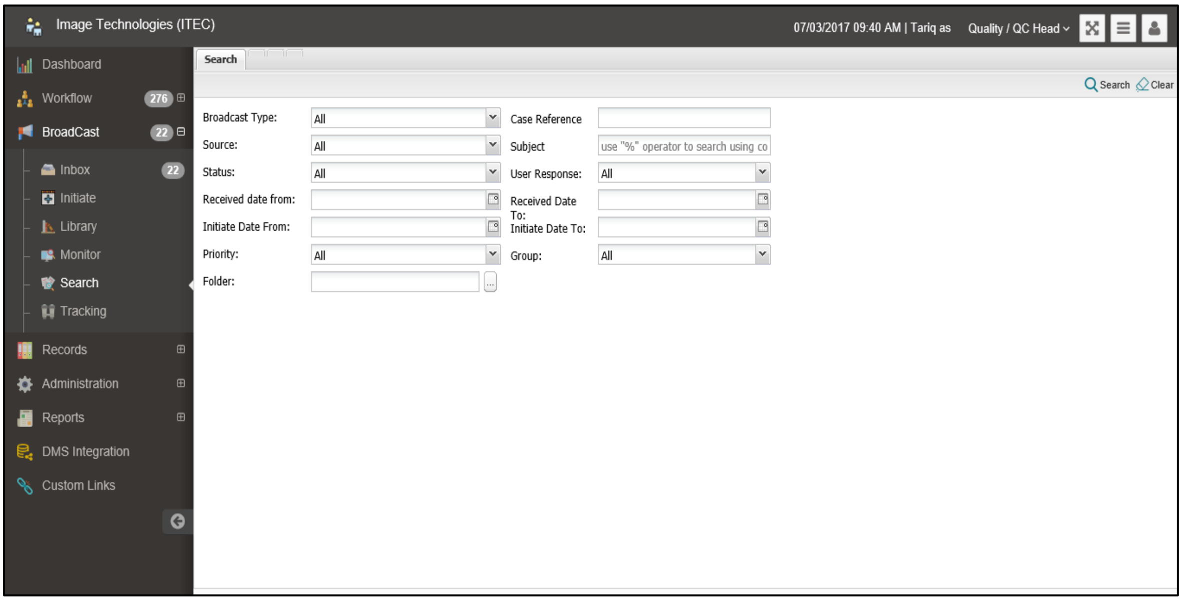


FIGURE 78: SEARCH PAGE (FOR YOUR INBOX AND LIBRARY BROADCASTS)

3. Fill your values inside the search fields.
4. Click Search button.
5. A list will be displayed based on your entered search values, as shown below:

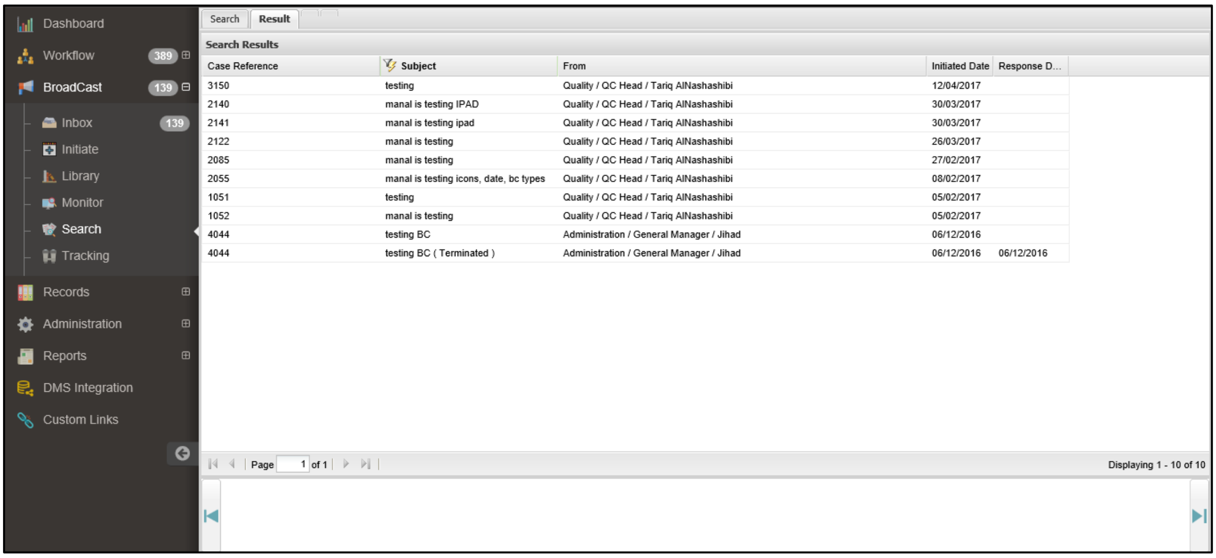


FIGURE 79: SEARCH PAGE - RESULT TAB

6. You can view a broadcast by double clicking it, the broadcast will be viewed in a separate tab as shown below:

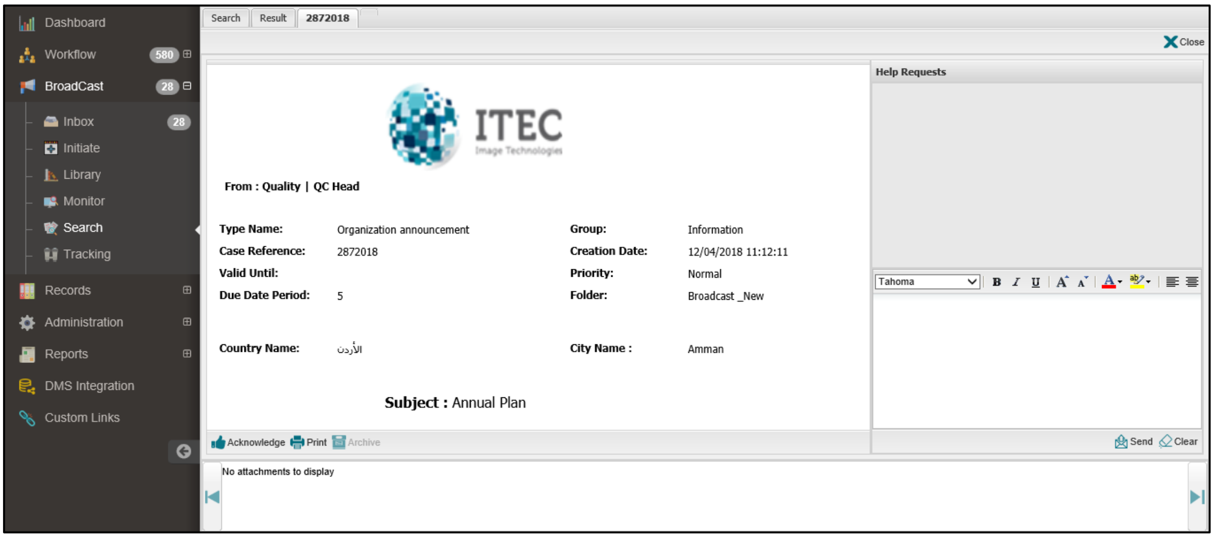


FIGURE 80: SEARCH PAGE – VIEWING A BROADCAST

You can print out the broadcast details using Print button at the left bottom side of the screen.

7. The broadcast's attachments appear in the attachments panel at the bottom side of the screen, to view the attachment you can click on the attachment icon.
8. To accept the regulation broadcasts, you can click Accept button at the left bottom side of the screen, so the accepted broadcast will be transferred from your inbox to your library.
9. To acknowledge the information broadcasts, you can click Acknowledge button at the left bottom of the screen as shown above, so the acknowledged broadcast will be transferred from your inbox to your library.

TIP: You cannot acknowledge/accept the broadcast without viewing at least one attachment.

10. You can send a help request to the broadcast initiator.
11. Broadcast initiator can reply to your help request.
12. You will see the reply sent from broadcast initiator in a blue color, as shown above.
13. You can archive the broadcast by clicking Archive button:
    - The system will display a confirmation message that says: “The selected broadcast will be archived, are you sure?”
    - Click "OK" button to archive.
    - The following message will be shown:

→ The archived broadcast will be removed from “library” and “monitor” sub tabs, and you can still view the archived broadcast via "User Search" and “Tracking”.

Broadcasts Tracking

35. Objectives

"Tracking" section is to perform a full search on all the broadcasts available in the organization.

– "Tracking" section is available for users who are granted the "Tracking" privilege by the administrator.

– Through **Tracking** section, inside the Search tab: You can perform search by entering values in the following fields:
  1. Broadcast Type: All broadcast types available in the system.
  2. Source: [All / Not Archived / Archived].
  3. Status: [All / Active / Not Active: Terminated or Overdue "Expired"].
  4. Initiate date (From – To): The date at which the broadcast was initiated.
  5. Priority: [All / Low / Normal / High].
  6. Folder: The folder that holds the broadcast.
  7. Case reference: The reference that is uniquely identifying broadcasts within the same broadcast type.
  8. Subject: The title of the broadcast that was determined by broadcast initiator
  9. Group: [All / Information / Regulation].
  10. Custom Fields of the selected broadcast type.

  – **Result Tab** will display the broadcasts that match the search criteria. The result tab will display the following columns to show some information about the retrieved broadcasts:
    1. Case Reference.
    2. Subject.
    3. Initiated date: The date at which the broadcast was initiated.

– Through the Result Tab, you can open a broadcast by double clicking it, so it will be displayed to you in a separate tab:
  1. You will see the details of the broadcast with its attachments.
  2. You can open the attachments of the broadcast.
  3. You can send help requests to the broadcast initiator:
     - Once you sent a help request, the broadcast initiator will receive a message via email/popup/SMS (according to their user preferences).
     - Once the broadcast initiator replied, you will receive a message via email/popup/SMS (according to your user preferences).
  4. You can print the broadcast details.
  5. You can archive only those broadcasts on which you have "Initiate" privilege. Archiving a broadcast, meaning:
     - Broadcast will be removed from "Monitor" section. Please refer to "Broadcast Monitor" section above.

- Broadcast will be removed from your library (if the broadcast was available there) and from libraries of all broadcast recipients as well, but it will NOT be removed from inboxes of broadcast recipients.
- You will be able to see the archived broadcast only through: [Your Inbox / Search screen / Tracking screen].

6. You can terminate ONLY those broadcasts on which you have “Initiate” privilege. You must write a termination reason to be able to terminate the broadcast. Terminating a broadcast meaning:
   - Broadcast will be moved from the “Active” folder to the “Inactive” folder in “Monitor” section.
   - Broadcast will be moved from the “Active” folder to the “Inactive” folder in your library (if the broadcast is available there) and in the libraries of all broadcast recipients as well, but it will NOT be removed from inboxes of recipients.
   - Broadcast will be sent as a new broadcast to inboxes of all recipients with a “termination” icon 🚫 that indicates that this broadcast was terminated, but the system will NOT remove the original broadcast from inboxes of recipients.
   - DocuTRAK will send a message via email/popup/sms to the broadcast recipients (according to their user preferences) to inform them that the broadcast was terminated and received in their inboxes.
   - DocuTRAK will log your entered termination reason in the broadcast history.
   - All broadcast recipients should acknowledge both:
     1. The original broadcast.
     2. the terminated broadcast.

36. How to use the screens

To track broadcasts, follow the below steps:

1. Go to Broadcast item in the navigator.
2. Click Tracking sub item, the following page will appear:

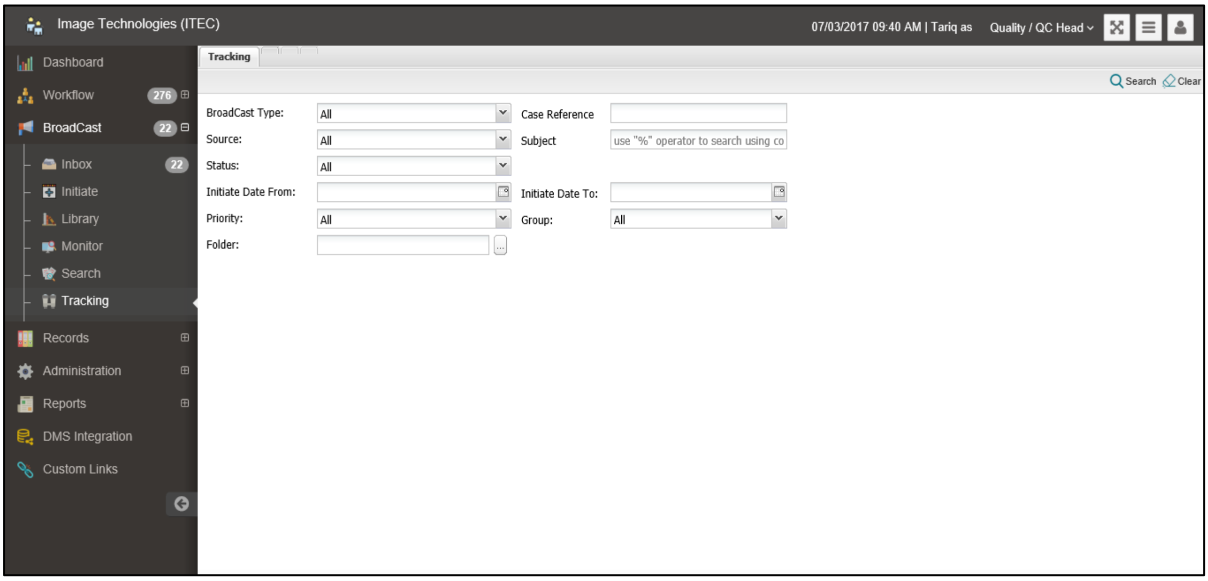


FIGURE 81: TRACKING PAGE

3. Fill your search criteria, then click  button.
4. A list will be displayed based on your search criteria as in the page below:

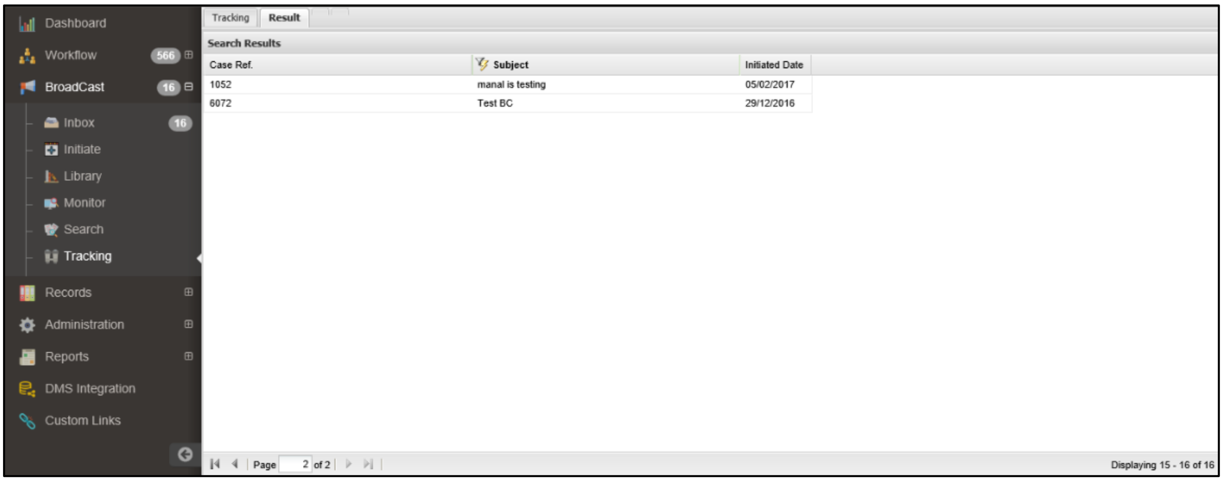


FIGURE 82: TRACKING PAGE - RESULT TAB

5. You can view a broadcast by double clicking it, the broadcast will be viewed in a separate tab as shown below:

ITEC
Image Technologies

www.itecj.com

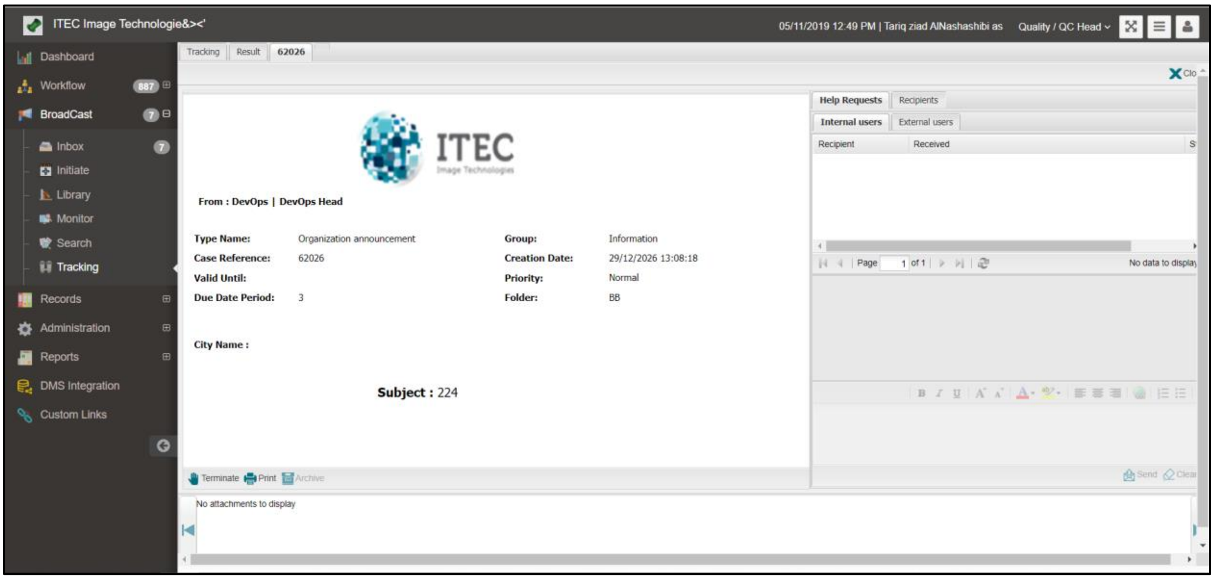


FIGURE 83: TRACKING PAGE – VIEWING A BROADCAST

You can print the broadcast details using Print button at the left bottom side of the screen.

6. The broadcast's attachments appear in the attachments panel at the bottom side of the screen, to view the attachment you can click on the attachment icon.
7. To reply to a help request, just click it.
8. You can archive the broadcast by clicking Archive button:
   - The system will display a confirmation message that says: "The selected broadcast will be archived, are you sure?"
   - Click "OK" button to archive.
   - The following message will be shown:

→ The archived broadcast will be removed from "library" and "monitor" sub tabs, and you can still view the archived broadcast via "User Search" and "Tracking".

9. You'll be able to terminate a broadcast - if needed - by clicking Terminate button, the following popup will appear:

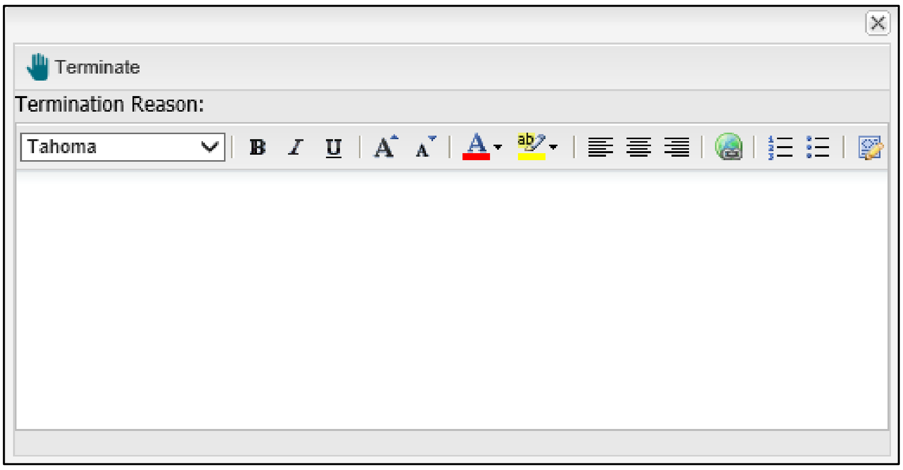


FIGURE 84: TERMINATION REASON POPUP

Write your termination reason in the text area.

a. Click Terminate button
b. The system will display a confirmation message that says: “The selected broadcast will be terminated, are you sure?”
c. Click "OK" button to terminate.
d. The following message will be shown:

e. A termination icon will appear in recipients’ inboxes next to the terminated broadcast, also a termination stamp will appear in the broadcast's details, as shown below:

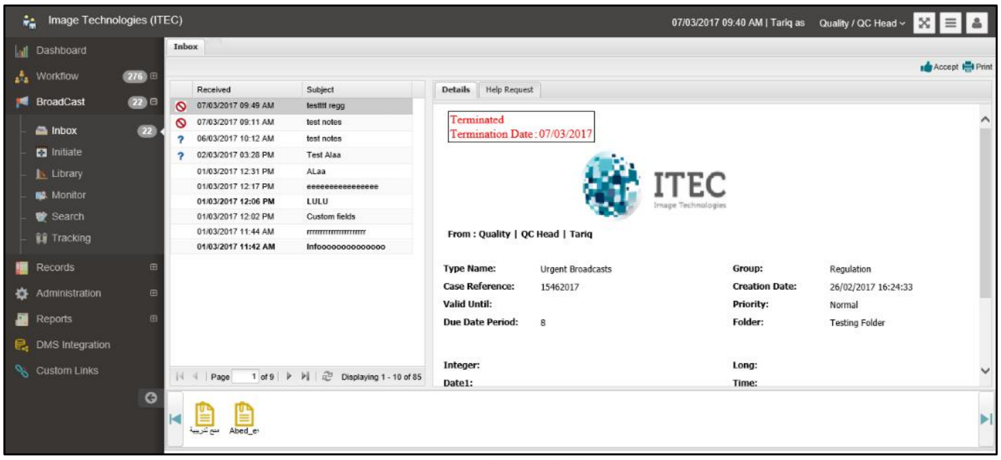


FIGURE 85: TERMINATION STAMP

Records

Introduction

Organizational correspondences must be managed effectively and efficiently; they are very important to the organizations because these correspondences define, document, and regulate the communications within the organization or externally. The correspondences are regarded as "Records", because they must be recorded and registered.

The set of processes that manage these records are called "Records Management"; which are responsible for the efficient and systematic control of the creation, receiving, maintenance, using and disposing of records.

You can attach files to the "In Progress" records only. For information about how to attach files to a record, please refer to the attachments in the section of "Workflow" above.

Records in the system go through different statuses. A summary of the records life cycle in DocuTRAK is explained in the table below:

Record Stage	User's Action	Trigger Action	DocuTRAK Action	Record Status
Creating	Inserting values into the custom fields. Attach documents and objects.	"Create"	Generate a reference number. Add the record information in the records tab.	In progress
Editing (as needed)	Editing the custom fields. Attach documents and objects.	"Edit" and "Save"	Saving the changes.	In progress
Deleting	User deletes an "In Progress" record.	"Delete"	Deleting the record. The record will not be submitted / registered.	Deleting
Registering	The user wishes to submit the finalized edits on the record (Registering the record).	"Register"	Lock the record from any further edits in order to send it to workflow, another record or\ and to archive it.	Registered
Archiving	User wishes to archive the registered record and its contents into a DMS.	"Archive"	Record is archived in a DMS.	Archived

Table 2: Records Life Cycle

Initiating a Record

38. Objectives

- You can create (initiate) a record ONLY if you have "Register" privilege on that record type. This privilege is granted by system administrator.
- You will initiate (create) a new record in the system.
- You will navigate to records initiation page and select the type of the initiated record.
- You can enter values in the custom fields of the initiated record.
- Custom fields section: Contains the following items:
  - ➢ Custom fields tab: Displays all types of custom fields, except of type "Rich text".
  - ➢ The "Logged-in user's information" custom field: Contains the following options (Department, Job Function, and Username). If "Logged-in user's information" custom field is assigned to a record type, then when you create a new record, these fields will appear populated with the logged in node information. These fields are in read mode.
  - ➢ Rich Text Tab: Display only the "Rich text" custom field in case the" Logged-in user's information" custom field is assigned to workflow type.

Note: You cannot assign more than one "Rich Text" custom field in the same workflow type.

- The "Rich Text" custom field contains the following buttons:
  - ❖ "Insert Predefined text template" button: Predefined Text templates added by the system administrator of a public type, or added by the user from the "User Preferences" where they are of a private type, the user can add any of these templates to the Rich Text custom field.

Note: The system administrator can add templates of a public and private type, and the user can only add special type text templates.

  - ❖ "View" button: When you click this button, a pop-up window opens with the previously entered text. The previously entered text can be replaced or modified by pressing the "Replace" button in the window.

- When creating, editing or registering a new record, the "stored copies" will be displayed for the actions performed on the record, where a copy of each of the following actions will be displayed: (Create, Edit and Register) on the record.
- You can add attachments to the record from different sources: [System File, DMS, Cases, Scan, and Template].
- Once you click "Create" button:

  1. System will create the record with an "In Progress" status.
  2. System will display a popup with the following options:
     - o Close: to close the popup and return to the default view of "Records" tab.
     - o Print Stamp: print a stamp for the record. The stamp's content, fields, and colors were defined by administrator.
     - o Print Follow-up: print a follow-up card that will be used as a later reference for the record. The follow-up card was defined by administrator.
     - o Print Sticker: print a small sticker for the record to stick it to the desired object.

- Edit: to edit the record by editing the values in the custom fields and adding/removing attachments.

39. How to use the screens

To initiate a record, please follow below steps:

1. Click "Records" item from the navigator.
2. Navigate to records initiation page
3. Select the record type

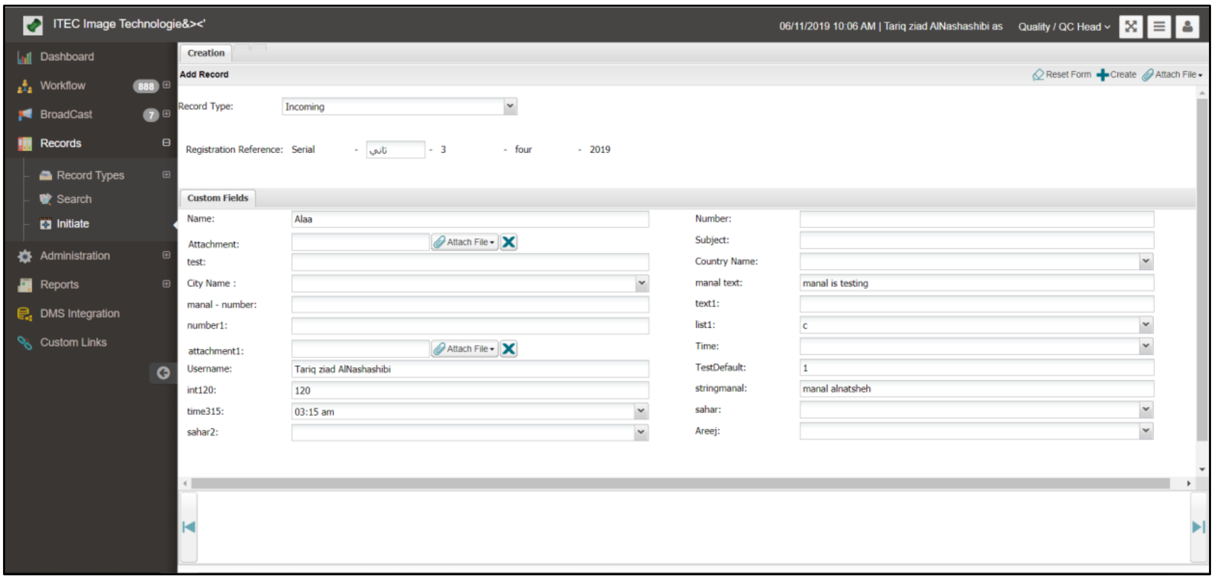


FIGURE 86: RECORDS CREATION PAGE

4. Fill the Custom Fields with the required record's information; attach needed documents and objects with your record.
5. Click Create button, a confirmation message will be displayed with further options you can use as shown below:

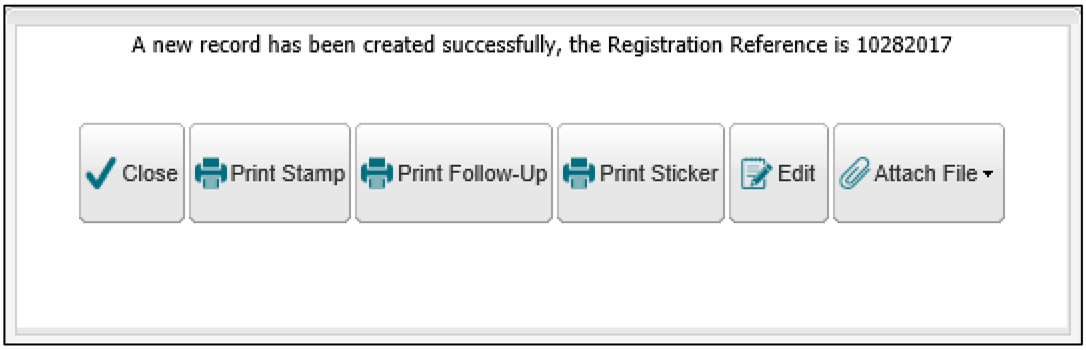


FIGURE 87: OPTIONS TO BE APPLIED ON THE NEW CREATED RECORD

6. You can use any of the above options or you can close the popup by using Close button, the newly created record will be added to the "Records" tab, and a unique registration reference will be generated automatically for the record.

   Note: Creation tab will not reset the filled fields' values when navigating between creation tab and records list.

Generate Official Letter

40. Objectives

You can generate an official letter through clicking the "Generate Official Letter" button on the top toolbar in the records page. You can generate the letter either with a header or without a header. The Generate Official Letter button will be enabled for in progress records only. The letter will be generated in Docx format, using the custom fields and registration number and date, then attach it to the record's attachment panel with a name (registration number) and the icon .

How to use the screens

To generate an official letter from a record, follow the below steps:

1. From "Records" tab, select the record you want to generate an official letter for.
2. Click Generate Official Letter button; to show the two options as below figure:

FIGURE 88: GENERATE OFFICIAL LETTER BUTTON.

3. Select "With Header" to generate the official letter with header and select "Without Header" to generate the official letter without header.
   → The following popup window will be displayed.

FIGURE 89: INITIATE OFFICIAL LETTER

- **View Button**: The official letter will be displayed, and the popup window will remain open until the user clicks on cancel or attach.
- **Generate button**: The official letter will be generated in Docx format and attached to the attachment's pool for the record. The window will get closed automatically.
- **Cancel:** The official letter will not be generated, and the window will get closed.

- The generated official letter with header should look like the following:

Registration Number : 62422017
Registration Date : 13/08/2017

User Name : Majid
Job Function : Product Marketing

بسم الله الرحمن الرحيم

الموافق.......... ....ميلادية.

سعادة المهندس/ مدير مشروع محطة تحلية المياه، وتوليد الطاقة المحترم
السلام عليكم ورحمة الله وبركاته وبعد،

فمن مقدمه/ سالم محمد إبراهيم، المهندس المتخصص في مجال الهندسة الميكانيكية. فقد نشرت الصحف المحلية أنكم في حاجة إلى مدير فني، متخصص في أعمال الهندسة الميكانيكية، ولديه خبرة في تركيب المعدات، والآلات الضخمة.

وبما أنه سبق لي أن عملت في مصانع الهندسة الميكانيكية مدة تزيد على خمس سنوات، فإني أتقدم إليكم بطلبي هذا للعمل في هذه الوظيفة.

وإنني أحمل شهادة "الهندسة الميكانيكية" من كلية الهندسة، جامعة الإمارات، عام 2000م، ولدي شهادة بحسن الخدمة من شركة "مصانع الأسمنت" التي عملت فيها.

ومرفق مع طلبي هذا صور أهم الشهادات والخبرات في هذا المجال؛ وأرجو أن ينال طلبي موافقتكم، وأنا على استعداد للالتحاق بالعمل مباشرة.

وتفضلوا بقبول فائق الاحترام

سالم محمد إبراهيم

العنوان:..............................
البريد الإلكتروني: ....

الهاتف: ....

FIGURE 90: GENERATED OFFICIAL LETTER WITH HEADER

- The generated official letter without header should look like the following:

Registration Number : 62422017
Registration Date : 13/08/2017

User Name : Majid
Job Function : Product Marketing

بسم الله الرحمن الرحيم

الموافق.......... ....ميلادية.

سعادة المهندس/ مدير مشروع محطة تحلية المياه، وتوليد الطاقة المحترم
السلام عليكم ورحمة الله وبركاته وبعد،

فمن مقدمه/ سالم محمد إبراهيم، المهندس المتخصص في مجال الهندسة الميكانيكية. فقد نشرت الصحف المحلية أنكم في حاجة إلى مدير فني، متخصص في أعمال الهندسة الميكانيكية، ولديه خبرة في تركيب المعدات، والآلات الضخمة.

وبما أنه سبق لي أن عملت في مصانع الهندسة الميكانيكية مدة تزيد على خمس سنوات، فإني أتقدم إليكم بطلبي هذا للعمل في هذه الوظيفة.

وإنني أحمل شهادة "الهندسة الميكانيكية" من كلية الهندسة، جامعة الإمارات، عام 2000م، ولدي شهادة بحسن الخدمة من شركة "مصانع الأسمنت" التي عملت فيها.

ومرفق مع طلبي هذا صور أهم الشهادات والخبرات في هذا المجال؛ وأرجو أن ينال طلبي موافقتكم، وأنا على استعداد للالتحاق بالعمل مباشرة.

وتفضلوا بقبول فائق الاحترام

سالم محمد إبراهيم

العنوان:..............................
البريد الإلكتروني: ....

الهاتف: ....

FIGURE: GENERATED OFFICIAL LETTER WITHOUT HEADER

- The contents of the official letter:

Figure : The content of the generated official letter

iApprove

41. Objectives

- This action is done through the records module, the user can send any record in the “In Progress” status for signing.
- Once the user selects a record for signing, an indicator will be added to the record sent for signing. As a result, the record will be locked, and the user won’t be able to make any modifications on the record information or attachments.
- All the documents attached with the records will be added to the attachment pool in the “Send for signing” window.
- The user can select only one document to be sent for signing.
- Only documents of type PDF or DOCX can be sent for signing.
- The user should define at least one recipient for the document to sign it. Subject, case due date field and job due date are all required fields.

42. How to use the screens

To send a record for signing, follow the below steps:

1. From the “Records” tab, select the record you want to send for signing.
2. Click the iApprove button; the “Send for signing” page will appear as shown below:

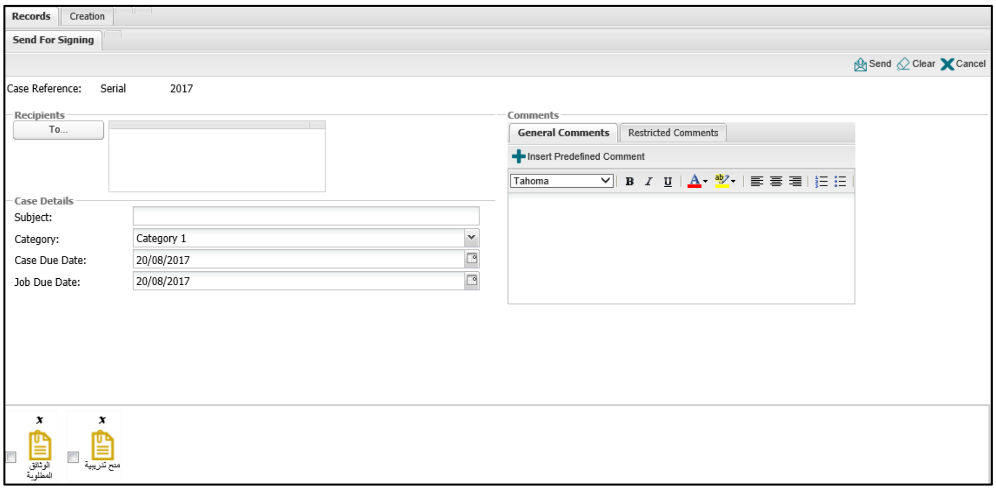


FIGURE 91: SEND FOR SIGNING PAGE

3. The user should set the recipients who will sign the document by clicking on “To” button which will open the following window:

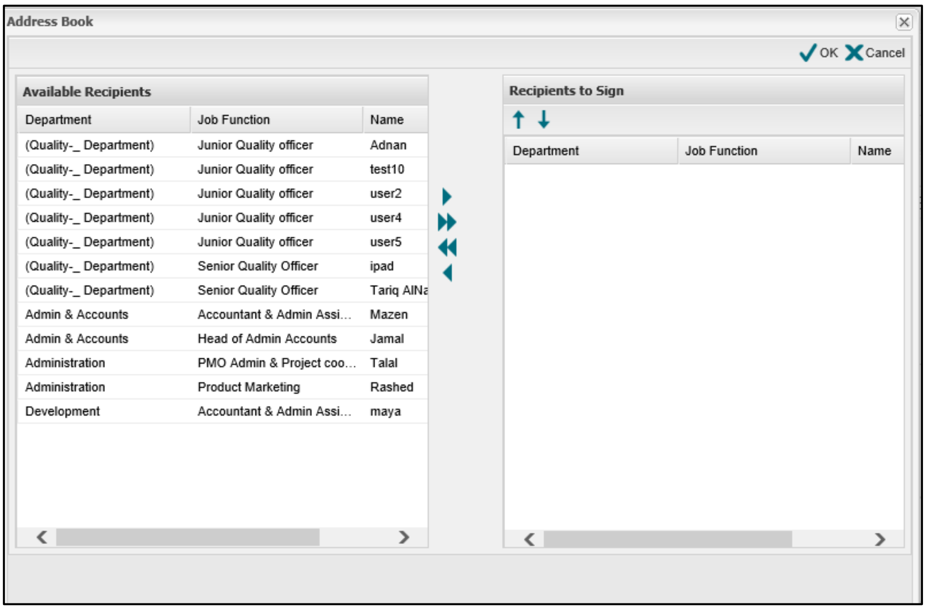


FIGURE 92: ADDRESS BOOK POPUP

4. Select the iPad nodes from the “Address Book“ window which displays the nodes based on the override OS privilege given to the logged in user on (Record to workflow signature) workflow type (You can insert more than one node).
5. Click OK to accept the recipient(s) you have chosen or Cancel to cancel the operation.

ITEC Image Technologies

www.itecj.com

6. Enter the subject of the case.
7. You can add General Comments or Restricted Comments.
8. Select the primary document that will be sent for signing by clicking on its check box.
9. Click on Send button:
   - The condition of the record will be (sent for signing).
   - The record is locked, and the user can't make any modifications on the record.

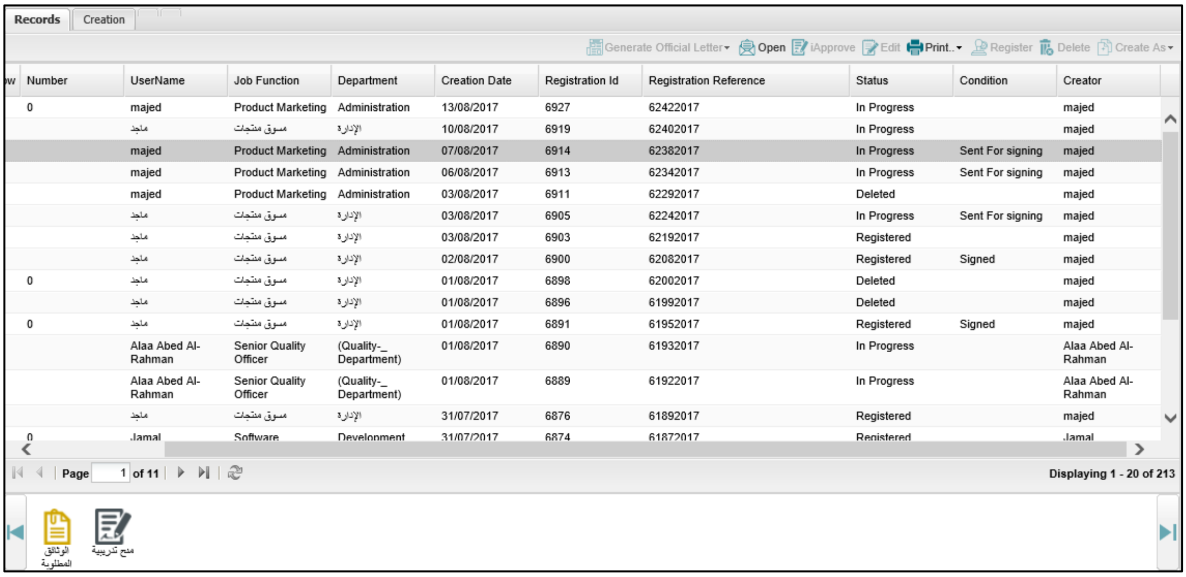


FIGURE 93: SENT FOR SIGNING RECORD.

→ Once the document is signed from all iApprove recipients, the following will happen:

- Signed document will be added to the records attachments pool.
- The condition of the record will change automatically to Signed.
- The case of type iApprove will get closed automatically with complete comments (The document is done with signature workflow).
- An email notification should be sent to the user who has sent the record for signing stating that a signed version is already attached to the records attachments pool.

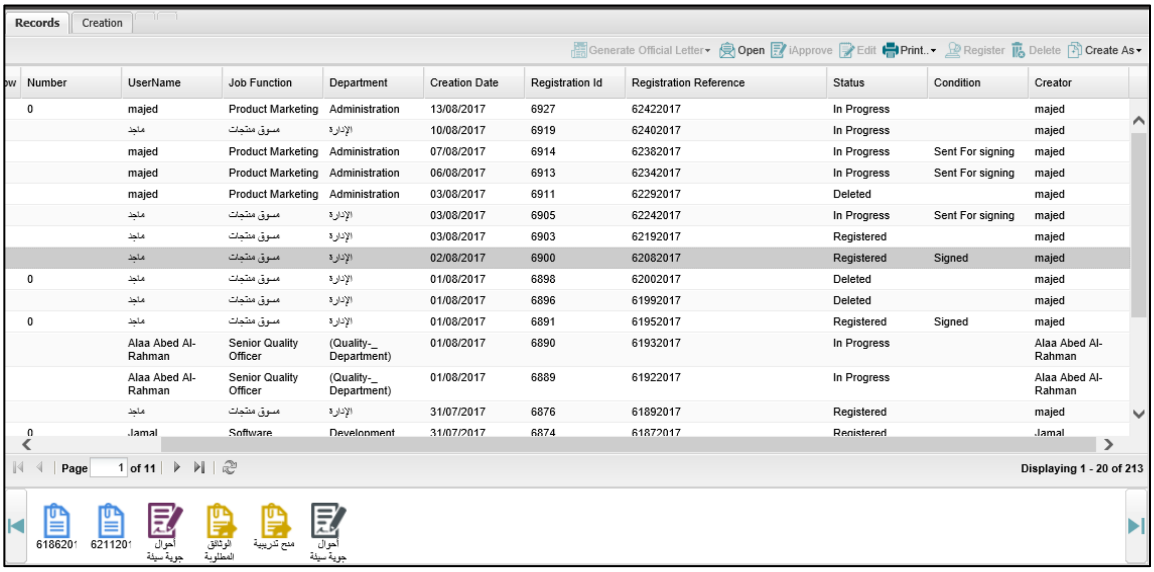


FIGURE 94: SIGNED RECORD

Cancel iApprove Action

43. Objectives

The user can cancel the iApprove action only under the following conditions:

- The condition of the record is (sent for Signing).
- The case is still in the inbox of the first recipient of iApprove.
- The performer of the cancelation is the initiator of iApprove action.

44. How to use the screens

To cancel an iApprove action on a record, follow the below steps:

1. From “Records” tab, select the record you want to cancel its iApprove.
2. Open the view tab of the record as shown below:

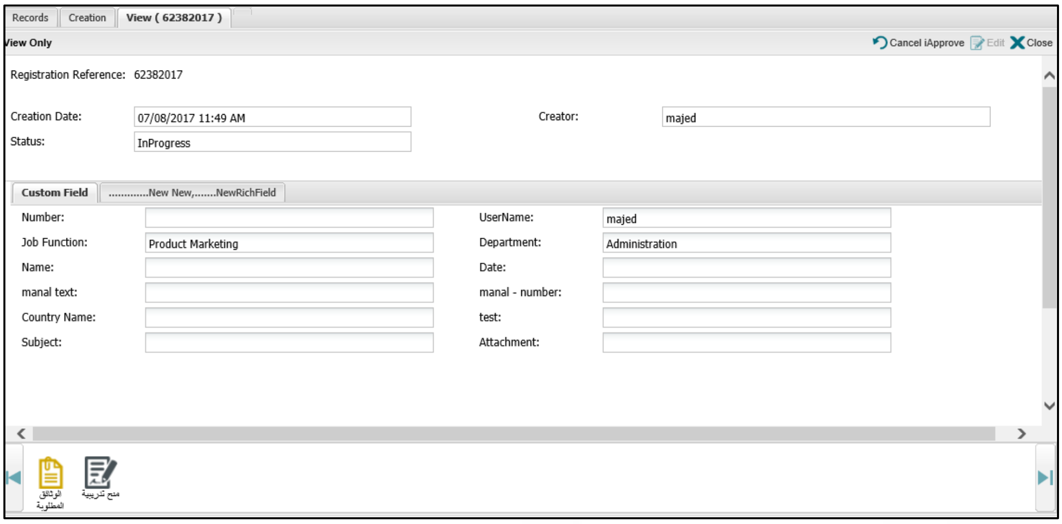


FIGURE 95: VIEW RECORD TAB

3. Click Cancel iApprove button.

→ Once the cancelation of iApprove actions is done successfully, the following will happen:

- Change the condition of the record to normal (condition column will be empty).
- The record will be unlocked; the user can perform any action on the record.
- Recall action will be added in the case history.
- The case will get closed automatically and the complete reasons will be (The case is closed automatically because of cancelation of iApprove action).
- The primary document will be presented in the normal icon.

Editing a Record

45. Objectives

Editing a record includes: (Editing values of custom fields, Add/remove attachments and objects), and it's applicable only for records of "in progress" status.

- You can edit the values of custom fields and add/remove attachments.
- Once you clicked on "Save" button in the below figure, all your changes will be saved for that "in progress" record.

46. How to use the screens

To edit a record, follow below steps:

1. From "Records" tab, select the record you want to edit.
2. Click Edit button; "Edit" tab will appear as shown below:

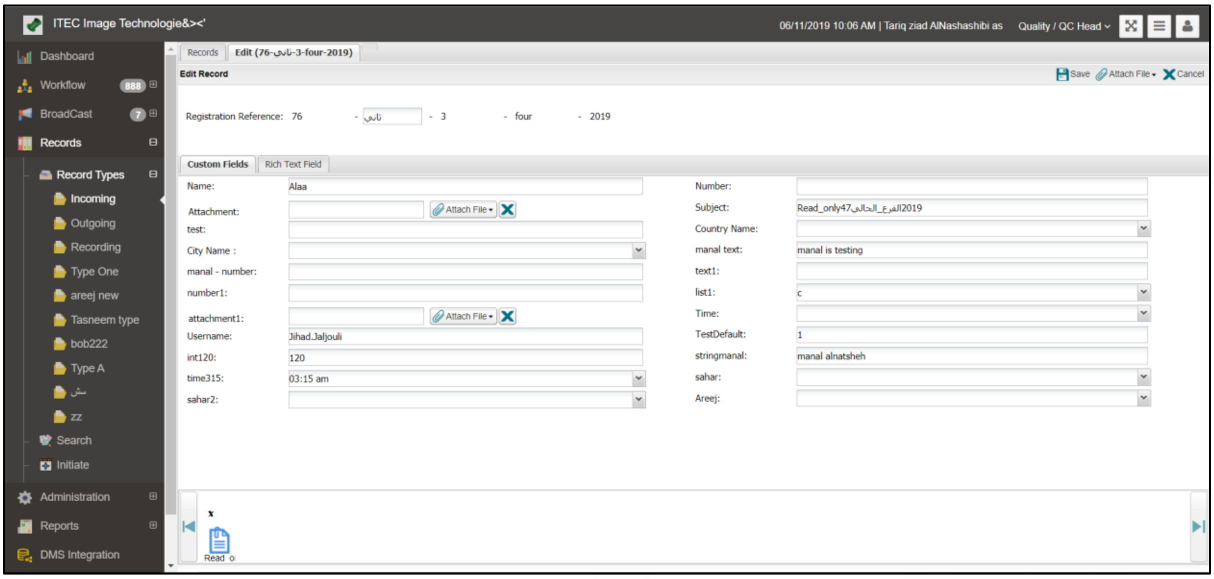


FIGURE 96: EDIT RECORD TAB

3. You can edit values of custom fields.
4. You can attach any required documents and objects (either records or cases).
5. Click on Save button to save your changes on that record or Cancel button to cancel the operation.

Registering a Record

47. Objectives

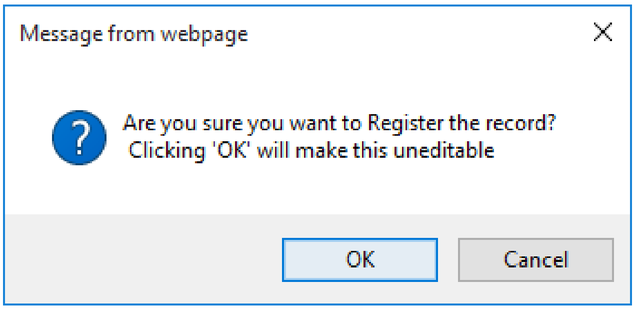
After finishing the required editing on a record, you need to confirm the registration of that record, and lock it from further changes.

– You can register a record ONLY if you have “Register” privilege on that record type.
– Only records in the “In Progress” status and has attachment can be registered.
– When you register a record:
    1. System will set the record’s status to “Registered”.
    2. System will prevent you from editing that record.
    3. Registered record can NOT be deleted.
    4. You can initiate a workflow, or another record based on the registered record. Please refer to the section of “Sending a registered record to a new record or case” below.
    5. You can archive the record. Please refer to the section of “Archiving a record” below.
    6. You can register many records by one click register for all selected records.

48. How to use the screens

To register a record, follow the below steps:

1. From “Records” tab, select the record that needs to be registered. The record's current status should be "In Progress".
2. Click Register button, the following message will appear:



3. Click “OK” button to confirm, or “Cancel” button to cancel the operation.

Note: In “Records” tab, once you select a registered record, the system will enable you to send the registered record to another workflow, record, or even archive it. For more information about sending a registered record, please see below section. For more information about archiving a record, please see “Archiving a Record” section below.

Sending a Registered Record to a new Record or Case

49. Objectives

Sometimes, you need to start working on a new record or a new workflow case depending on an already "Registered" record; this mapping should be already configured by system administrator.

- Once you select a record and send it to a selected workflow type, the system will display the “Initiate” sub tab of Workflow module:
  1. Registered record will be displayed as an attachment inside the attachment pool of Workflow “Initiate” sub tab.
  2. System will copy the mapped custom fields values from the selected registered record and paste them into their destination mapped custom fields in Workflow “Initiate” sub tab. This mapping between custom fields is defined by system administrator.
  3. You will initiate a new workflow case via Workflow “Initiate” sub tab which holds the registered record as an attachment.
  4. The new workflow case will be initiated holding the registered record as an attachment; otherwise you can remove that attachment before initiating that new workflow case.

- Once you select a registered record and send it to another record type, the system will display the “Creation” page of the “Records” module:
  1. The registered record will be displayed as an attachment inside the attachment pool of Records “Creation” page.
  2. System will copy mapped custom fields values from the selected registered record and paste them into their destination mapped custom fields in Records “Creation” page, this mapping between custom fields is defined by administrator.
  3. You will initiate a new record via Records “Creation” tab which holds the registered record as an attachment.
  4. The new record will be created holding the registered record as an attachment; otherwise you can remove that attachment before creating that new record.

50. How to use the screens

❖ To send a registered record to a new workflow case, follow the below steps:

1. From “Records” tab: select the "registered" record you want to send to a new workflow case.
2. Click  → , the following popup will appear:

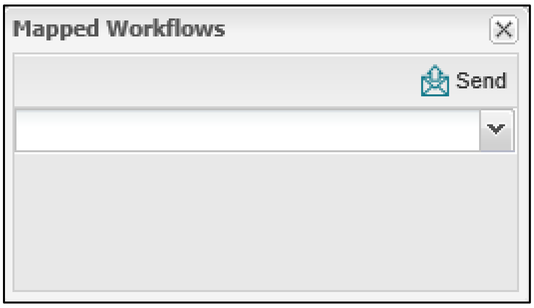


FIGURE 97: SEND TO A NEW WORKFLOW

The dropdown list shown above will display all the destination workflows types which are mapped with the registered record type.

3. Choose the workflow type to which you want to send the registered record.
4. Click on Send button.
5. You will be directed to Workflow "Initiate" sub tab in order to initiate a new workflow case.
6. The workflow “Initiate” sub tab will contain the workflow type - selected in popup above - as the default selected item of “Workflow Type”.
7. The workflow “Initiate” sub tab will show the custom fields of the selected workflow type.
8. The workflow “Initiate” sub tab will fill the mapped custom fields’ values. You can also edit them as needed.
9. The workflow “Initiate” sub tab will contain the registered record as an attachment. You can also remove it if needed.
10. You can add/remove attachments.
11. You will initiate the new workflow case by clicking on “Send” button from Workflow “Initiate” tab.

> **Note:** When the user sends a record to a workflow and after completing the action on the newly created workflow case, the system will return automatically to the records module (records list).

❖ To send a registered record to a new record, follow the below steps:

1. From “Records” tab: select the "registered" record you want to send to a new record.
2. Click Create As → Duplicate Record, the following popup will appear:

FIGURE 98: SEND TO A NEW RECORD

3. Dropdown shown above will display all the destination record types which are mapped with the registered record type.
4. Choose the record type to which you want to send the registered record.
5. Click on Send button.
6. You will be directed to Records initiate page related to the registered record type in order to create a new record.
7. Records initiate page will show the custom fields of the selected record type.
8. Records initiate page will fill the mapped custom field’s values. You can still edit them.
9. Records initiate page will contain the registered record as an attachment.
10. You can add/remove attachments.
11. You will create the new record by clicking on “Create” button from Records initiate page

Archiving a Record

51. Objectives

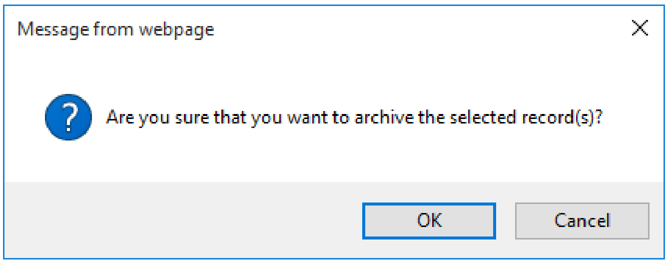
You need to archive a registered record to a Document Management System (DMS).

- Only the “registered” records can be archived.
- Archiving a registered record means:
  1. System will move the record to a document management system (DMS) according to DMS settings defined in the DMS Integration.
  2. System will hide the archived record from “Records” tab.
  3. The status of record will be set to “Archived”.
  4. You will be able to see archived records only by making a search via “Search” tab.
  5. Archived record can NOT be edited/ deleted and cannot be changed to another status.

52. How to use the screens

To archive a record, follow the below steps:

1. From “Records” tab, select a record which you want to archive, make sure that the status of this record is "registered".
2. Click Create As → Archive , the following popup will appear:



3. Click on "OK" button to send the record to DMS system, or "Cancel" button to cancel the operation.

Deleting a Record

53. Objectives

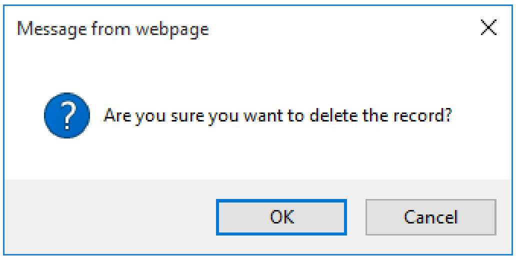
- Only “in Progress” records can be deleted.
- Deleting an “in progress” record means:

1. You don’t need this record anymore.
2. The status of record will be set from “in progress” to “deleted”.
3. You can see the deleted records by search through the “Search” tab.
4. Deleted record cannot be edited and cannot be changed to another status.

54. How to use the screens

To delete a record, follow the below steps:

1. Make sure that the record status is “in progress”. Otherwise "delete" button won't be enabled.
2. From “Records” tab, select the record you wish to delete.
3. Click Delete button, the following popup will appear:



4. Click "OK" button to confirm the deletion, or “cancel” to cancel the operation.
5. Record status will be changed to "deleted".
6. Record will keep its reference number but can't be registered anymore.
7. The available commands for the deleted record will be:
   View, print stamp, Print follow-up and Print sticker.

Printing Record's Data (stamp, follow up and stickers)

55. Objectives

Sometimes you need to print a stamp / follow up card / or a sticker for the record.

- You can print the stamp / follow-up card / or a sticker for any record you see in your “Records” tab regardless of the record’s status.
- For some work procedures you might need to print a stamp for your record.
- The stamp’s content, fields, and colors are defined by administrator.
- You might need to print a follow-up card to give it to customer for reference purposes.
- Follow-up card’s content, fields, and colors are defined by administrator.
- You might need to print a small sticker for the record.
- Sticker’s fields and colors are defined by the administrator.

56. How to use the screens

To print a Stamp for a record, follow the below steps:

1. Select the desired record from “Records” tab.
2. Click Print.. → Stamp button, the following popup will appear:

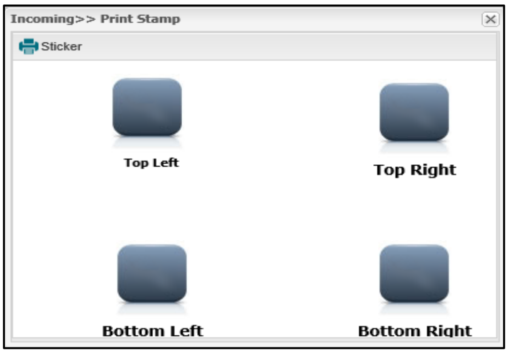


FIGURE 99: PRINT STAMP POPUP

If the stamp location is set to a dynamic location by the admin, the stamp location pop-up will appear as the below allowing you to drag the stamp to set its location instead of using the 4 angles, as the below:

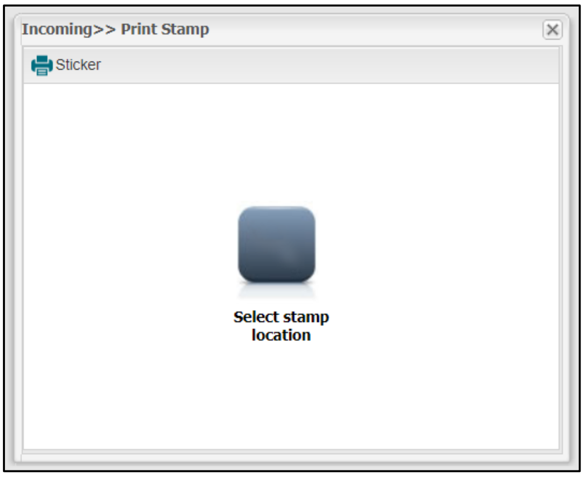


FIGURE 100: DYNAMIC STAMPS POP-UP

3. Choose the stamp location, a web page with the stamp will be displayed, so you can print it.
4. You can use  button to cancel the operation.

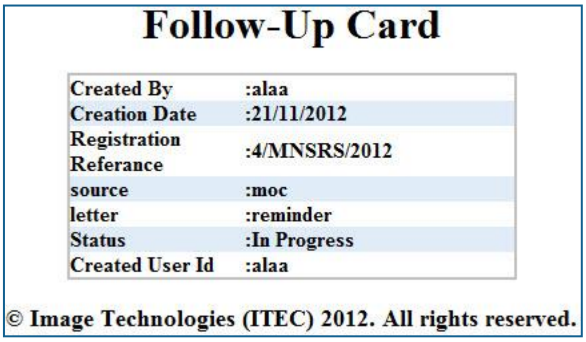
❖ To print a Follow-up card for a record, follow the below steps:

a. Select the desired record from "Records" tab.

b. Click 

→ 

button, the following follow-up card will be displayed, so you can print it:



Follow-Up Card

Created By	:alaa
Creation Date	:21/11/2012
Registration Referance	:4/MNSRS/2012
source	:moc
letter	:reminder
Status	:In Progress
Created User Id	:alaa

FIGURE 101: PRINTING A FOLLOW-UP CARD

To print a Sticker for a record, please follow below steps:

a. Select the desired record from “Records” tab.

b. Click Print.. → Sticker button, a sticker will be displayed, so you can print it:

FIGURE 102: PRINTING A STICKER

Search for Records

57. Objectives

By default, you can search for records that you have created (initiated).

- If you have “Full Search” privilege, you can search all records regardless of their initiators.
- You need to specify the values by which you want to search for records.
- System will display the records that match your search criteria.
- Through “Results” tab, you can double click the desired record to open it.
- Double clicked record will be shown in a separate tab called “View”.
- You can edit the record ONLY if its current status is “In Progress”.

58. How to use the screens

To search for records, follow the below steps:

1. Click “Search” Tab, the following page will appear:

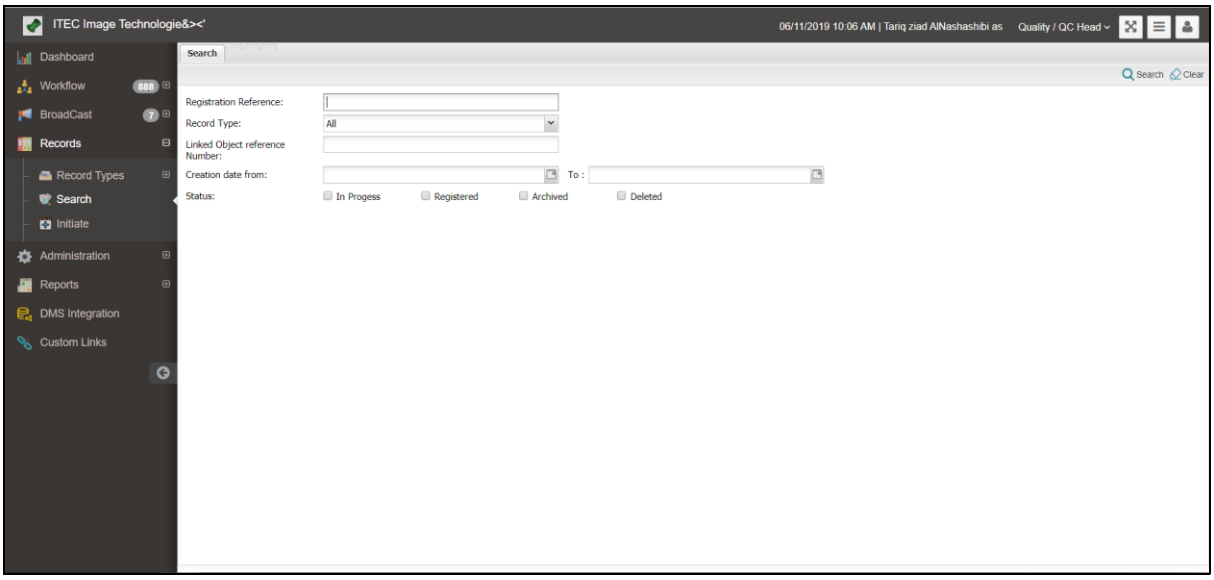


FIGURE 103: SEARCH CRITERIA PAGE

2. Enter your search criteria to refine the search results; if you choose a specific record type from the "Records Type" dropdown, then the custom fields of the selected record type will appear, so you can fill custom fields' values for which you want to search.
3. Click 

button, a list of matched records will appear in the "Result" tab as shown below:

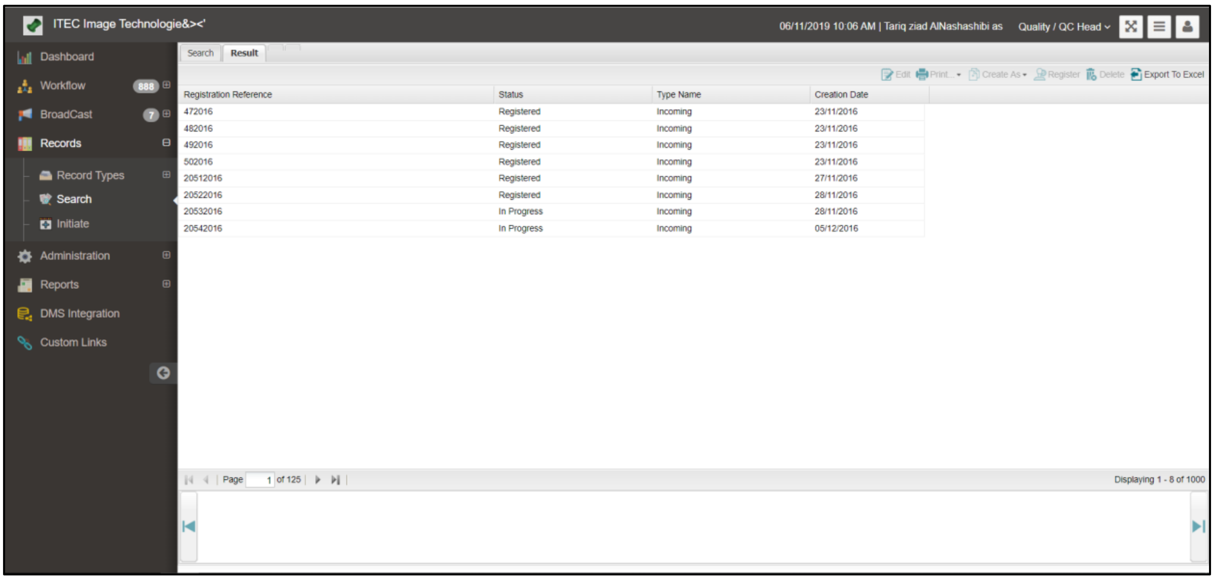


FIGURE 104: SEARCH RESULT PAGE

4. From the "Result" tab you can view a record by double clicking it, so it will be shown in a separate tab called "View".
5. You can also update a record, select it from the menu shown above and click "Edit". A separate tab called "Edit" will be shown, please refer to the above section called "Editing a Record".

Exporting to Excel Function

59. Objectives

EXPORT TO EXCEL FUNCTIONALITY ENABLES THE USER TO EXPORT THE RESULTS OF THE SEARCH TO AN EXTERNAL EXCEL FILE, SO THE USER CAN ANALYZE, MANAGE AND REPORT THE EXPORTED DATA OUTSIDE THE SYSTEM.

60. How to use the screens

1. SEARCH ON A SPECIFIC RECORD TYPE OR SEARCH FOR ALL THE RECORDS TYPES.

Click on 

button, a save dialog will be opened to enable the user to specify the store path of the document on the user's machine. The default name of the Excel file is "RecordsSearch".xls.

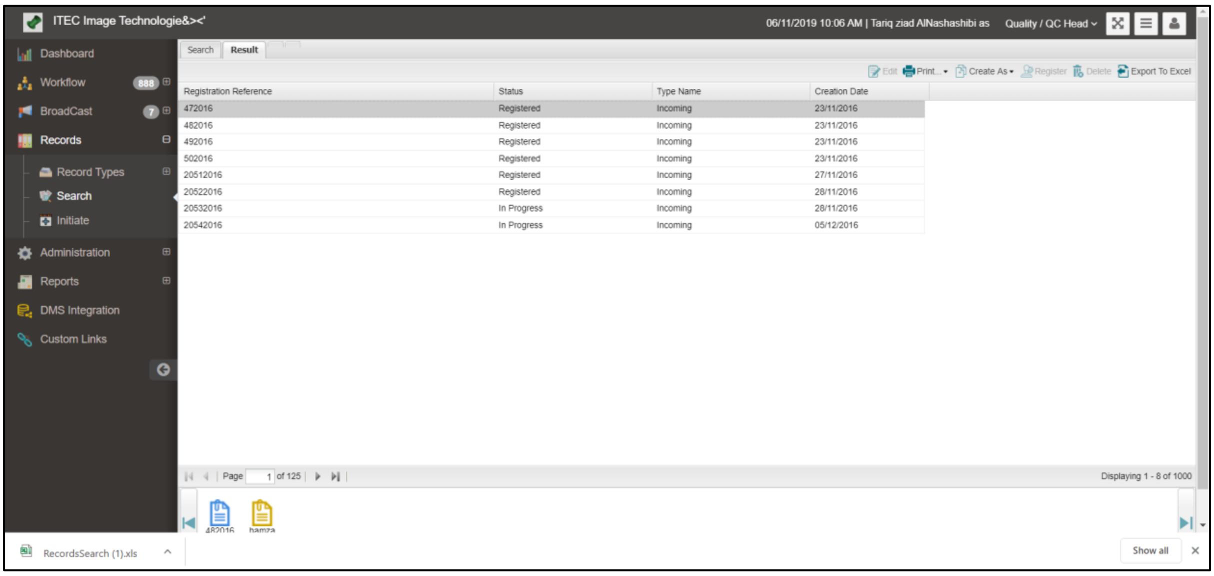
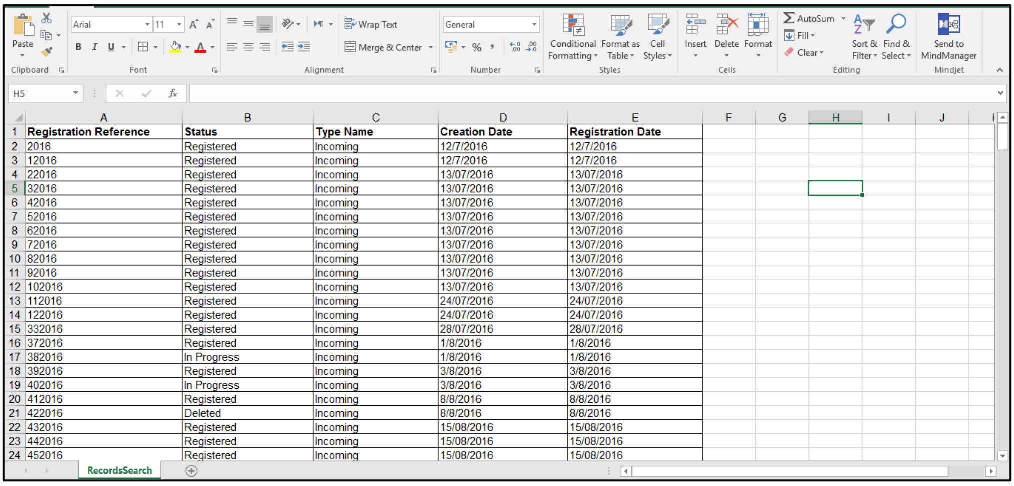


FIGURE 105: SAVING RECORD SEARCH FILE

- The exported columns are the following: Registration Reference, Status, Type name, Creation Date and Registration Date.
- A list of records will appear in the "Excel" file as shown below:



Registration Reference	Status	Type Name	Creation Date	Registration Date
2016	Registered	Incoming	12/7/2016	12/7/2016
12016	Registered	Incoming	12/7/2016	12/7/2016
22016	Registered	Incoming	13/07/2016	13/07/2016
32016	Registered	Incoming	13/07/2016	13/07/2016
42016	Registered	Incoming	13/07/2016	13/07/2016
52016	Registered	Incoming	13/07/2016	13/07/2016
62016	Registered	Incoming	13/07/2016	13/07/2016
72016	Registered	Incoming	13/07/2016	13/07/2016
82016	Registered	Incoming	13/07/2016	13/07/2016
92016	Registered	Incoming	13/07/2016	13/07/2016
102016	Registered	Incoming	13/07/2016	13/07/2016
112016	Registered	Incoming	24/07/2016	24/07/2016
122016	Registered	Incoming	24/07/2016	24/07/2016
332016	Registered	Incoming	28/07/2016	28/07/2016
372016	Registered	Incoming	1/8/2016	1/8/2016
382016	In Progress	Incoming	1/8/2016	1/8/2016
392016	Registered	Incoming	3/8/2016	3/8/2016
402016	In Progress	Incoming	3/8/2016	3/8/2016
412016	Registered	Incoming	8/8/2016	8/8/2016
422016	Deleted	Incoming	8/8/2016	8/8/2016
432016	Registered	Incoming	15/08/2016	15/08/2016
442016	Registered	Incoming	15/08/2016	15/08/2016
452016	Registered	Incoming	15/08/2016	15/08/2016

FIGURE 106: EXPORT TO EXCEL - SEARCH RESULT

Customizing Records List

61.Objectives

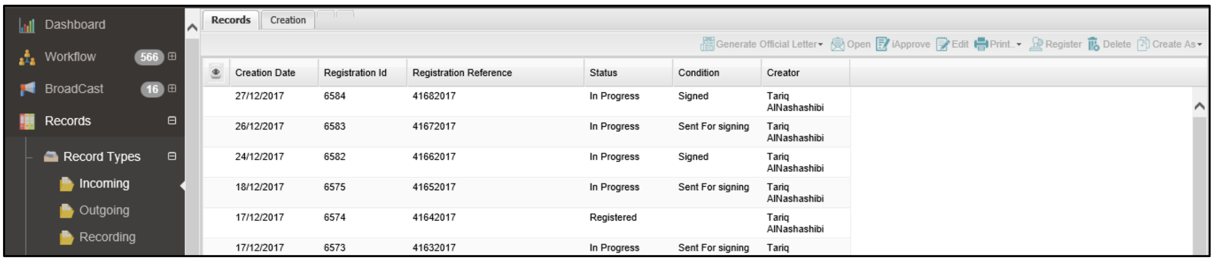
Sometimes you need to display - in “Records” tab - some custom fields instead of displaying all of them.

– You can select the desired custom fields to be shown.
– You must select at least one custom field.

62.How to use the screens

To define which columns to appear in “Records” tab, follow the below steps:

1. Click the  button in “Records” tab, as shown below:



Creation Date	Registration Id	Registration Reference	Status	Condition	Creator
27/12/2017	6584	41682017	In Progress	Signed	Tariq AlNashashibi
26/12/2017	6583	41672017	In Progress	Sent For signing	Tariq AlNashashibi
24/12/2017	6582	41662017	In Progress	Signed	Tariq AlNashashibi
18/12/2017	6575	41652017	In Progress	Sent For signing	Tariq AlNashashibi
17/12/2017	6574	41642017	Registered		Tariq AlNashashibi
17/12/2017	6573	41632017	In Progress	Sent For signing	Tariq

FIGURE 107: RECORDS TAB

2. The following popup will appear:

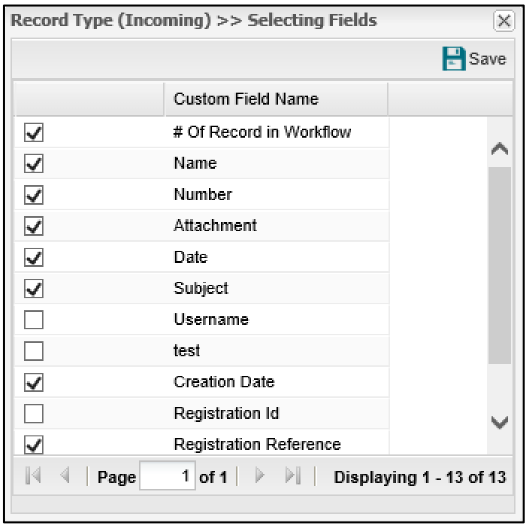


Figure 108: Selecting Fields

3. Select which columns you would like to display in the records list.
4. Click  button to reflect the changes into "Records" tab.
5. You can use  button to cancel the operation.

Records history

This feature allows saving all the business actions that have been performed by any of the nodes on the record. Opening the record in view mode through the record type inbox page or through the search page, will open the record in two tabs page.

1. Go to Records module and select a record type.
2. Select any record from records list.
3. Focus and select the new “Records History” tab.

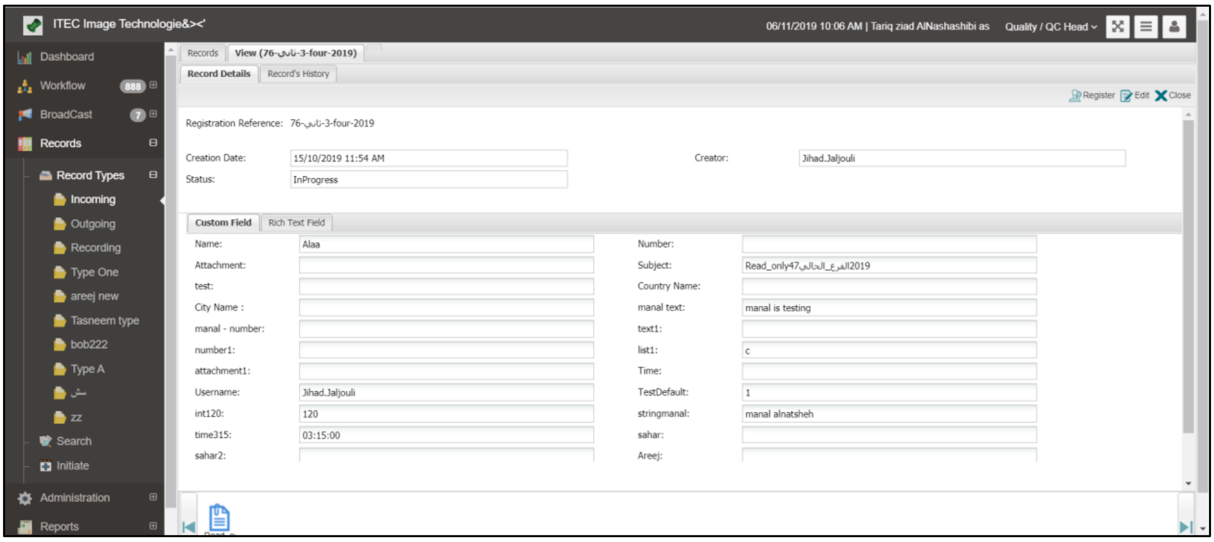


FIGURE 109: RECORD DETAILS

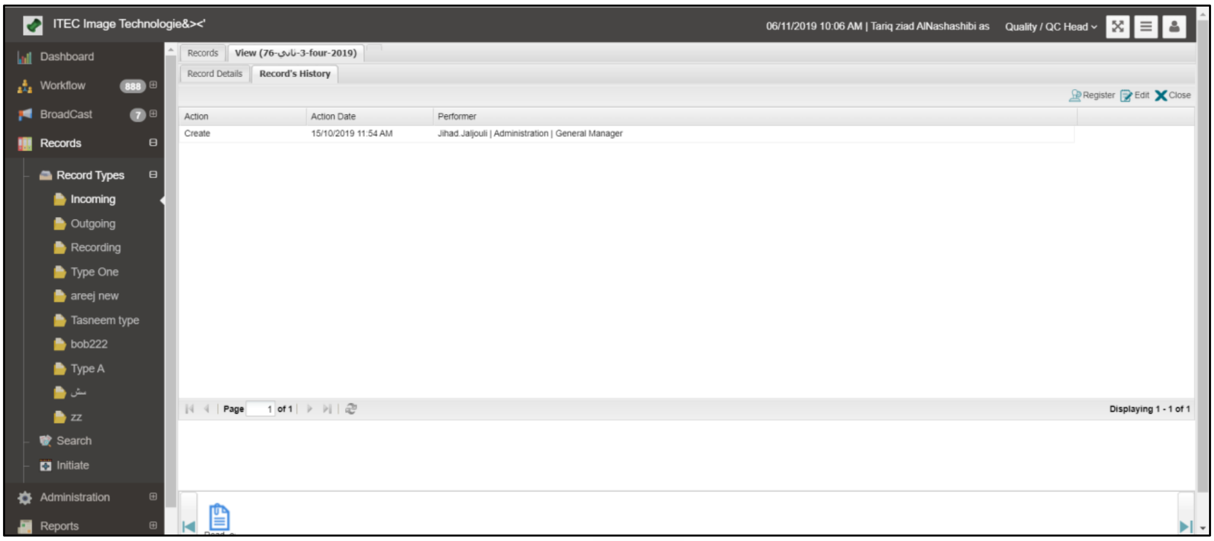


FIGURE 110: RECORD’S HISTORY

User Preferences

Introduction

DocuTRAK user preferences sub system allows users to update their account information, manage alerts, configure workflows auto-assign setup and review account settings.

Manage Alerts

Objectives

DocuTRAK sends alerts to users according to specific actions. The alert modes include E-mail, Popup, and SMS.

- By default, you will see that all your alert modes (trigger actions) are unchecked.
- To allow alerts on specific actions, you can choose the alert mode beside each desired trigger, the alert modes (trigger actions) are:
    1. E-mail: the system will send an email message to your email address. Your email address is defined in the user's account information. Please refer to the section of "User's Account Information" below.
    2. Popup: the system will display a popup. The popup application is installed by you. Please refer to the section of "Download Popup Application" below.
    3. SMS: the system will send SMS message to your mobile number. Your mobile number is defined in the user's account information. Please refer to the section of "User's Account Information" below.

- The triggers that can prompt the system to send alerts are:
    1. New case in inbox: once you receive a new workflow case in your inbox.
    2. Case due date exceeded: once your inbox workflow case exceeded its specified case due date (meaning received workflow case becomes overdue before you complete it).
    3. Case Recalled: once you recall a workflow case from your completed sub tab to your inbox sub tab.
    4. Case Closed: once you completed a workflow case from your inbox.
    5. Case Acknowledgements: once you acknowledge your received workflow case.
    6. Case Assigned: once you assign a workflow case from your inbox to another node.
    7. Case de-assigned: once you de-assign the workflow case that you have assigned.
    8. Broadcast Case Help Request: once you received a new help request from a broadcast recipient.
    9. Broadcast Received: once you received a new broadcast at your inbox.
    10. Broadcast Acknowledged: once a broadcast recipient acknowledged a broadcast you had initiated.
    11. Broadcast Case Help Request Reply: once your help request is replied.
    12. Application Errors: once an error occurred on DocuTRAK system.
    13. Consultation Reply Received: Once the consulted nodes reply the consultation, an alert message will receive to the consultant node. In case the imitator of the case do an action on the case before the recipients reply to the consult an alert message will be sent to inform them that the case is no longer in their inbox.

14. Signed Document Is Received: Once all iApprove recipients sign the primary document, an alert message will be sent to the initiator of iApprove to inform them that the signed document is attached.
15. New case initiated that is owned by you: when a new case is initiated where you're set as a case owner for the case.
16. A case that is owned by you is recalled: when a new case is recalled where you're set as a case owner for the case.
17. A case that is owned by you is closed: when a new case is closed where you're set as a case owner for the case.
18. A case that is owned by you is reopened: when a new case is reopened where you're set as a case owner for the case.

How to use the screens

1. Go to "User Preferences" menu from the main header to login to user preferences sub system.
2. Click "Manage Alerts" sub item, the following page will appear:

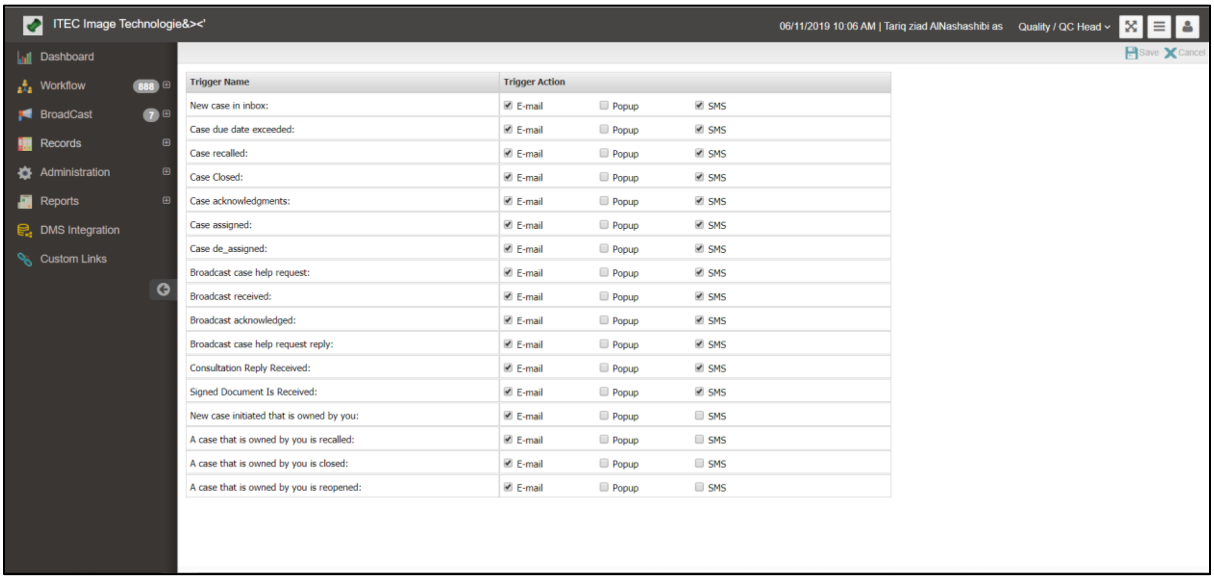


FIGURE 111: MANAGE ALERTS

3. You'll find the available alert modes (trigger actions) associated to each trigger, as shown above.
4. Click the checkbox of alert mode corresponded to the trigger for which you would like to activate.
5. Click Save button to save changes, or Cancel to cancel the operation.
   After saving; you'll start receiving alerts for the selected triggers. Knowing that system administrator should activate the alert mode on the desired object type (workflow / broadcast). For more information about defining object types, please refer to DocuTRAK Admin Manual.

Users Account Information

Objectives

- You might need to update your account information. Account information includes:
  1. Username: the unique login name that is used by you to log into DocuTRAK system.
  2. Employee Number: the unique number that identifies each user in DocuTRAK system.
  3. Email: your email address that will receive the alerts sent by the system. Full English Name: your profile name that will be displayed in English-language interface.
  4. Full Arabic Name: your profile name that will be displayed in Arabic-language interface.
  5. Mobile No: your mobile number that will receive the alerts sent by system.
  6. Default Language: the default system language displayed to you once you logged-in successfully to the system.
  7. List Size: the size of your inbox page (number of cases per view page).
  8. Refresh Time (In Minutes): the time interval at which system will refresh your data.
  9. Default node: to select the node by which you want to login by default into DocuTRAK system.
- You can also change your current password.

How to use the screens

To manage your account information, follow the below steps:

1. Go to “User Preferences” menu from the main header to login to user preferences sub system.
2. Click “User's Account Information” sub item, the following page will appear:

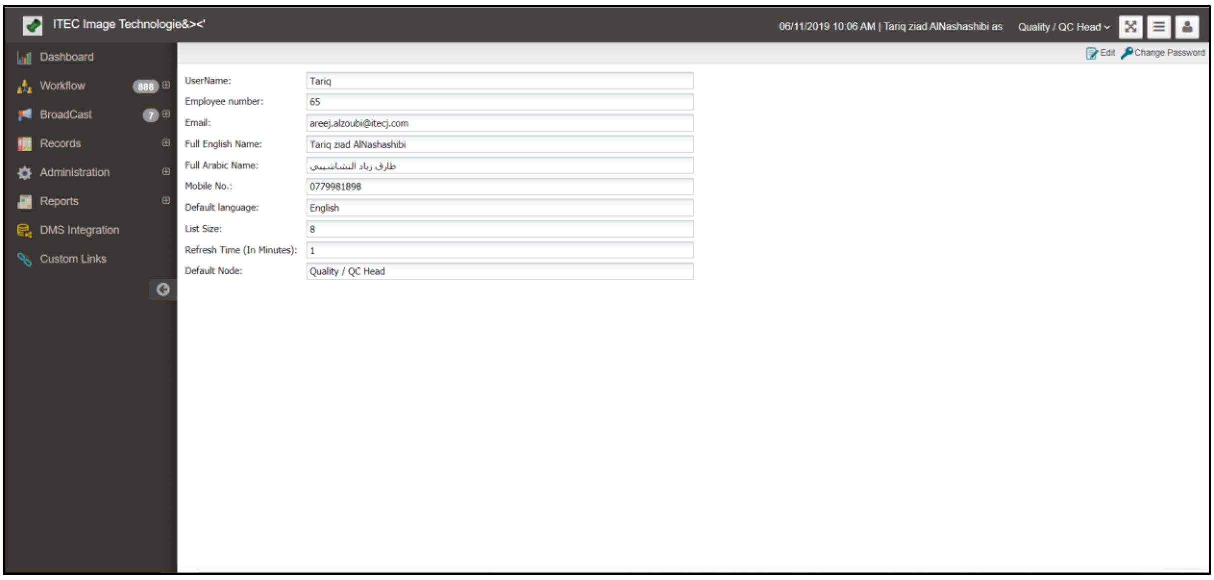


FIGURE 112: USER’S ACCOUNT INFORMATION

Edit User's Account Information

To edit your account information, follow the below steps:

1. In user's account information page, click Edit button at the right top of the page, the page will appear as follows:

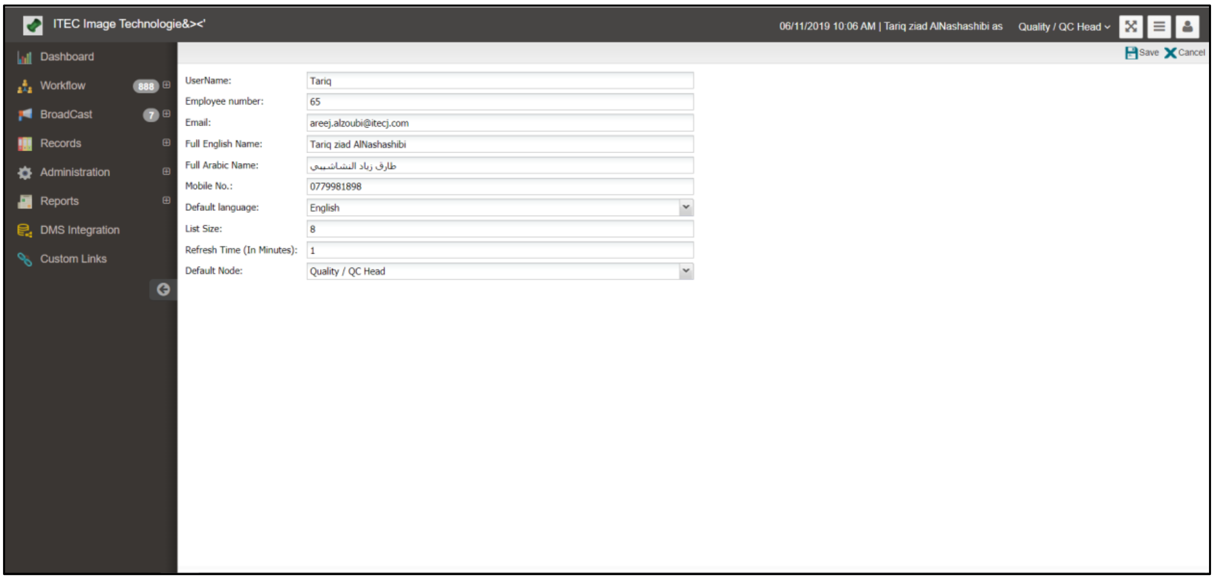


FIGURE 113: EDIT USER'S ACCOUNT INFORMATION

2. You can update your mobile number in "Mobile No" Field if needed.
3. You can change your interface default language by choosing it from 'Default Language" list.

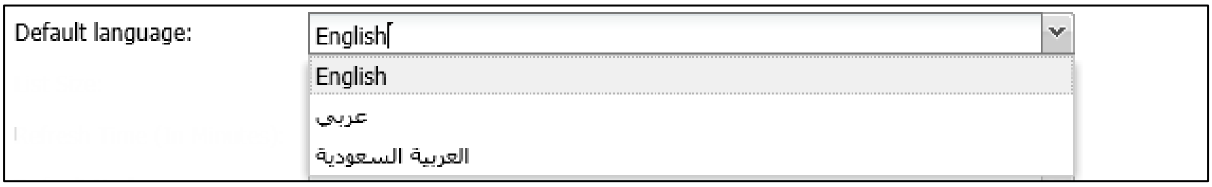


FIGURE 114: EDIT ACCOUNT INFORMATION (CHOOSE DEFAULT LANGUAGE)

4. From the "List Size" field, you can update the size of lists that appear in your interface.
5. From "Refresh Time (In Minutes)" field, update the time needed to refresh your workflows.
6. In case you are assigned to more than one job function, you can change your default job function by choosing it from 'Default Job Function" list.
7. Make any updates needed and click on Save button to save changes, or Cancel to cancel the operation.

Note: The logged in user won't be able to edit the following fields: "Username", "Employee number", "Full English Name" and "Full Arabic Name".

Change Password

To change your password, please follow the below steps:

1. In “user's account information” page, click Change Password button at the right top of the page, “Change Password” popup will appear as follows:

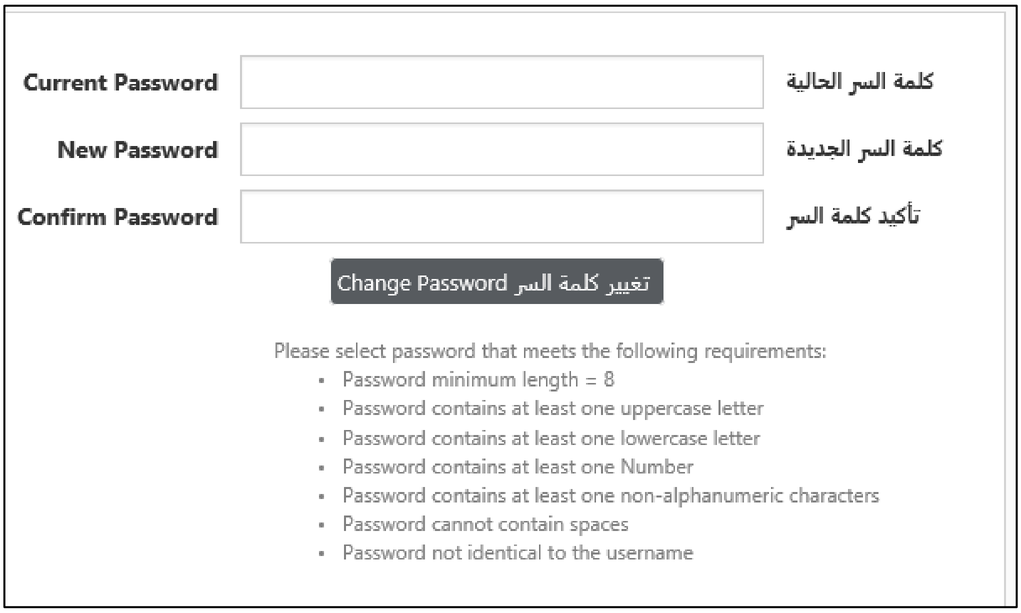


FIGURE 115: RESET PASSWORD

1. Insert your Current password in the "Current Password" field.
2. Insert new password in the "New Password" field, then re-enter it in "Confirm Password" field.

Note: The user can define a new password that complies with the password policy that defined previously by DocuTrak administrator.

3. Click on Change Password button to save your new password, the following notification message will appear to notify the user that they will be logged out:

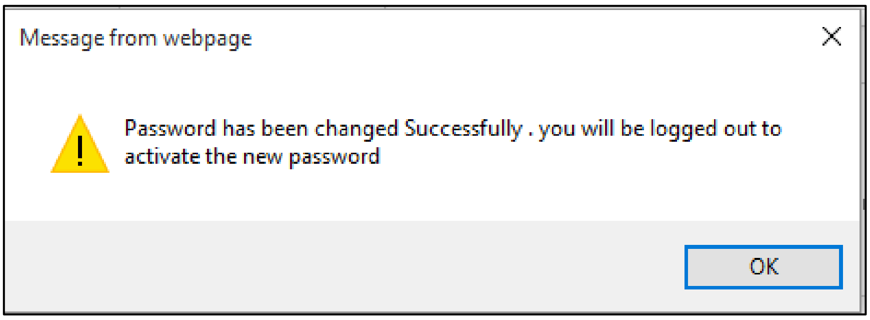


FIGURE 116: RESETTING PASSWORD NOTIFICATION

Workflow Auto-assign List

Objectives

Sometimes you need to auto-assign workflow cases from your inbox to other nodes, or auto-assign workflow cases between your subordinates (For more applicable examples on assigning workflow cases, please refer to “Assigning a case” section). Once a workflow case was assigned from a node to another, the privileges of assigner node on that workflow case will be assigned to the assigned node.

1. To add a new auto-assign, you should specify the followings:
    a. From: the node from which the workflow case will be auto assigned.
    b. To: the node to which the workflow case will be auto assigned.
    c. Description: the description of this auto-assign process
    d. Status: Active/Inactive
    e. Workflow Type: the type or types of workflow cases that will be auto assigned.
    f. From: the starting date at which auto-assign process will start.
    g. To: the end date at which auto-assign process will end.
2. You can view the available auto-assign, but you can’t edit it.
3. You can delete the available auto-assign.
4. You can activate/deactivate the auto-assign:
    a. By default, your new added auto-assign is activated.
    b. If you want the auto-assign interval to take effect, just activate it.
    c. If you don’t need the auto-assign interval to take effect, just deactivate it.

How to use the screens

To manage Workflow Auto-Assign settings in DocuTRAK, please follow below steps:

1. Go to “User Preferences” menu from the main header to login to user preferences sub system.
2. Click “Workflow Auto-assign List” sub item, the following page with your current auto-assign settings list will appear:

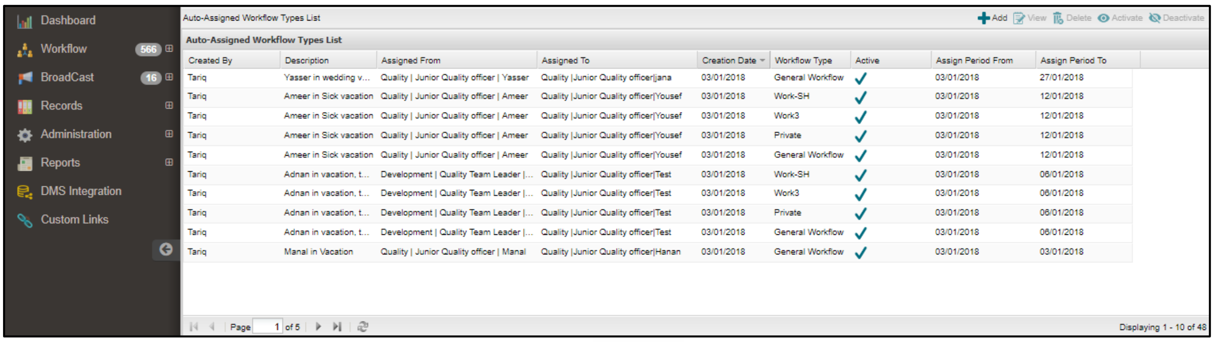


FIGURE 117: WORKFLOW AUTO-ASSIGN LIST

Add Workflow Auto-assign Setting

To add a workflow auto-assign setting, please follow below steps:

1. Click  button at the right top of the page, "Set new auto-assign" page will appear as follows:

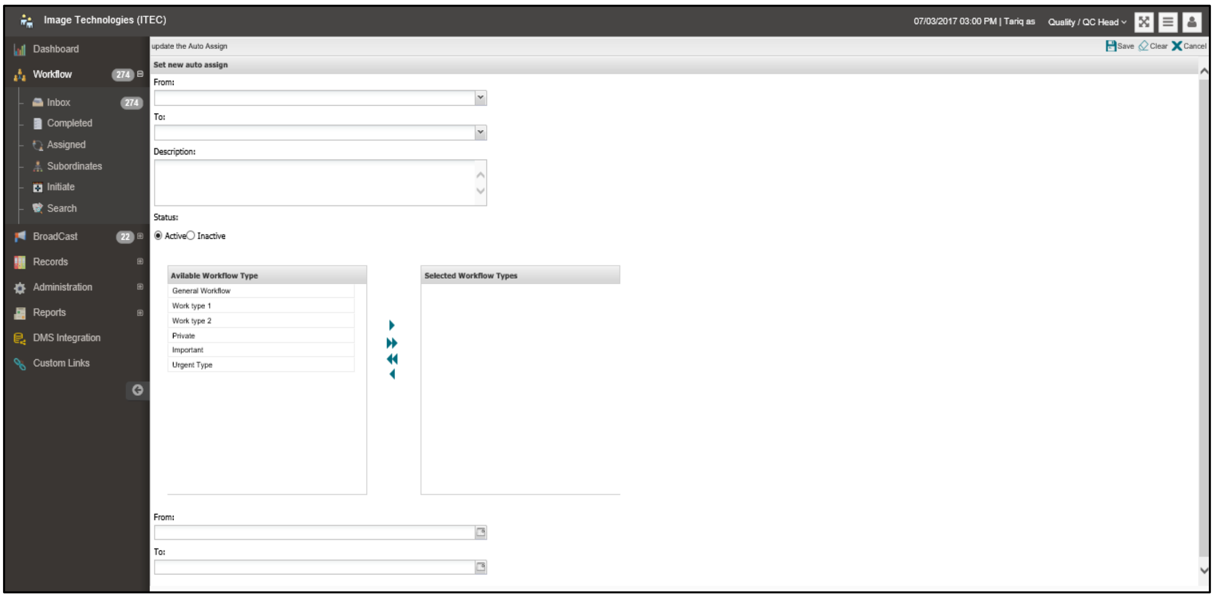


FIGURE 118: ADD WORKFLOW AUTO-ASSIGN

2. Through a dropdown called "From", choose the employee from which upcoming workflows will be assigned to another node. You'll be able only to assign your cases or your subordinates' cases to others.

FIGURE 119: ADD WORKFLOW AUTO-ASSIGN (CHOOSE "ASSIGN FROM" USER)

3. From a dropdown called "To", choose the employee to which upcoming workflows will be assigned. You'll be able only to assign cases to your subordinates.

FIGURE 120: ADD WORKFLOW AUTO-ASSIGN (CHOOSE "ASSIGN TO" USER)

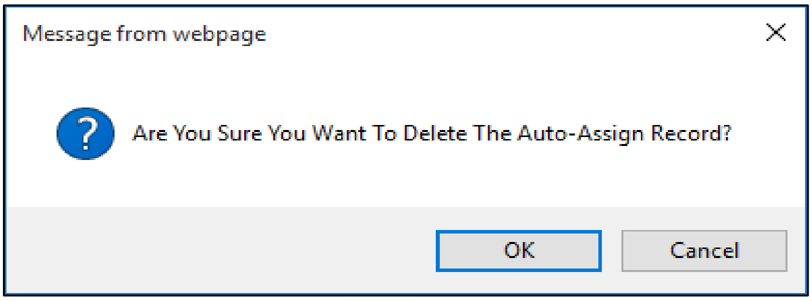
4. Insert description for the workflow auto-assign setup in the "Description" field.
5. Choose status for the workflow auto-assign setup either "Active" or "Inactive".
6. From "Workflow Type" dropdown, choose the desired workflow type from which upcoming cases will be auto assigned.
7. From the calendar lists "From" and "To": select the period during which the workflow cases will be auto-assigned.
8. Click Save button to save your new workflow auto-assign setup, or Cancel to leave the page without saving, a confirmation message will appear as follows in case of saving:

Delete Workflow Auto-assign Setting

To delete an existing workflow auto-assign setup, please follow below steps:

In “Auto-Assigned Workflow Types List” page, select the setup you would like to delete

1. Click Delete button at the right top of the page, the following message will appear:



2. Click "OK" button to confirm, or "Cancel" to cancel the operation.

Deactivate Workflow Auto-assign Setting

To deactivate a workflow auto-assign setup, please follow below steps:

1. In “Auto-Assigned Workflow Types List” page, select an active setup to deactivate.
2. Click 

button at the right top of the page, the following confirmation message will appear:

3. Click "OK".

Activate Workflow Auto-assign Setting

To activate a workflow auto-assign setup, please follow below steps:

1. In “Auto-Assigned Workflow Types List” page, select a deactivated setup to activate.
2. Click 

button at the right top of the page, the following confirmation message will appear:

3. Click "OK".

View Assigned ACLs

Objectives

1. Access Control List (ACL) is a set of privileges granted to you by system administrator.
2. Each node has its granted ACLs.
3. Through this section, you will view your granted Access Control Lists (ACLs). These ACLs were defined by system administrator.
4. You will see your detailed set of privileges (your granted privileges on each module) in a section called “View Assigned Privileges” below.
5. DocuTRAK will display information of your granted ACLs, via three columns:
    a. Name: the name of your Access Control List.

b. Description: this field describes ACL as specified by system administrator.
c. Active: either ACL is active or not.

6. For more details about ACLs, please refer to “DT3 Admin Manual”.

How to use the screens

To view ACLs you've been assigned to, please follow below steps:

1. Go to “User Preferences” menu from the main header to login to “user preferences” sub system.
2. Click “View Assigned ACLs” sub item, the following page with your assigned ACLs will appear:

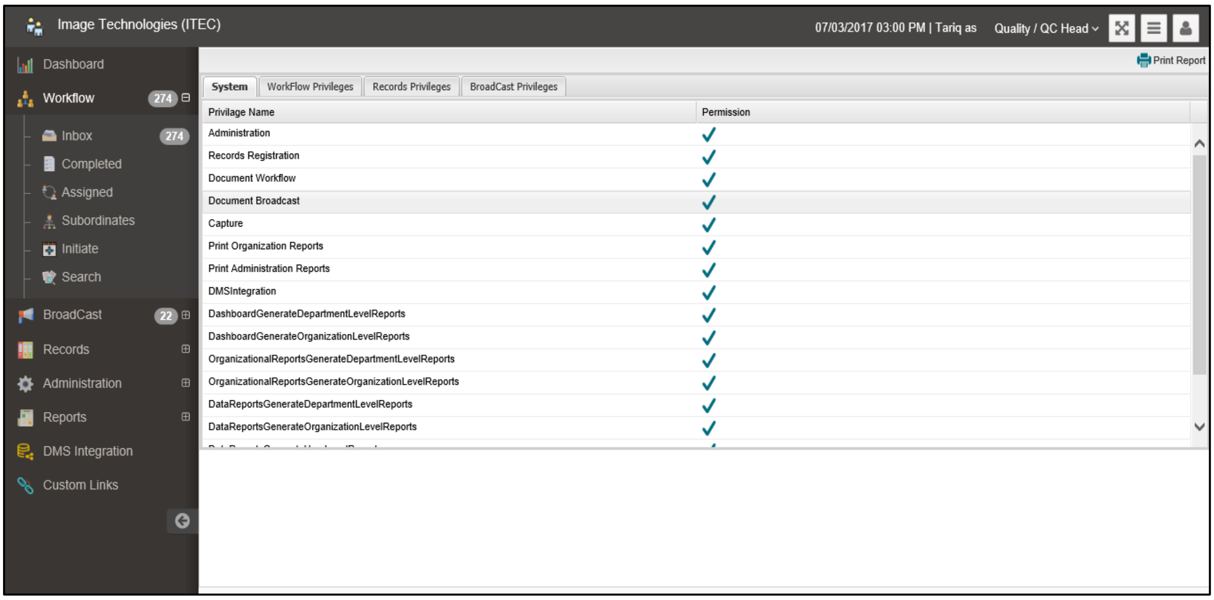


FIGURE 121: YOUR ASSIGNED ACLS

View Assigned Nodes

Objectives

- You can view all nodes to which you are assigned.

1. Nodes are defined by administrator.
2. Node is a combination of Department, Job Function, and Username.
3. You might be available in one or more node.
4. Through this section, system will display all the nodes to which you are assigned, via the following columns:
    a. Job Function: your role within the organization.
    b. Department Name: your department within the organization
    c. Head Node: your parent node
    d. Shared: please refer to the concept of single node and shared node in the introduction of “Workflow” section above.
    e. Active: either the node can login into DocuTRAK or not.

How to use the screens

To view the nodes you've been assigned into, please follow below steps:

1. Go to “User Preferences” menu from the main header to login to “user preferences” sub system.
2. Click “View Assigned Nodes” sub item, the following page with Nodes to which you are assigned will appear:

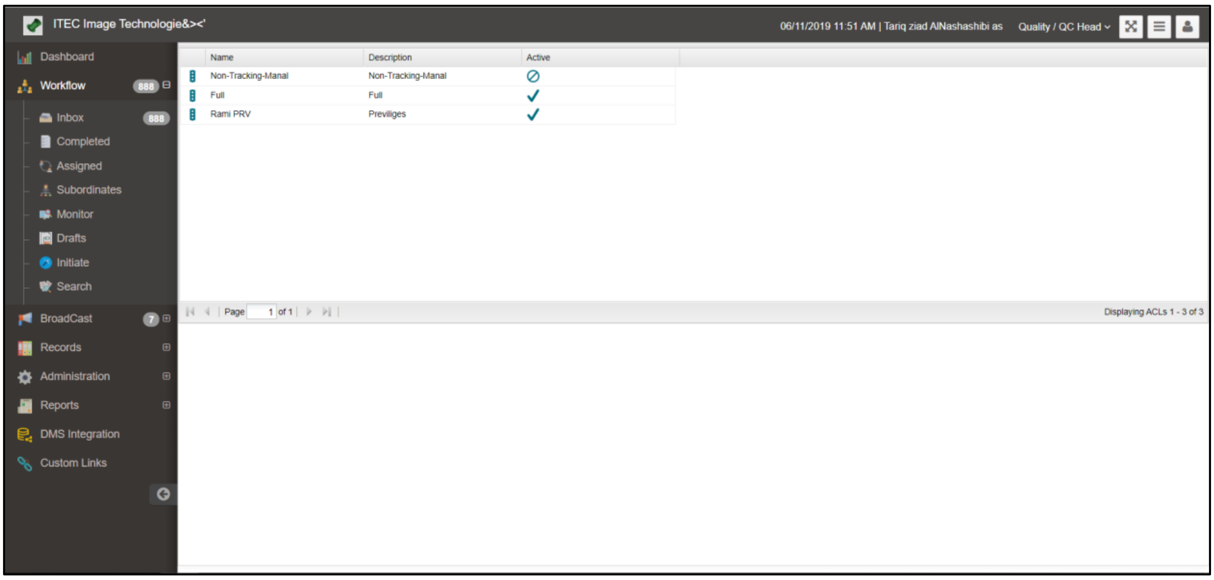


FIGURE 122: YOUR ASSIGNED NODES

View Assigned Privileges

Objectives

The privilege is a permission within your Access Control List (ACL). The privileges are granted by administrator.

1. You can view the privileges that are granted to you.
2. Privilege allows you to perform certain action in DocuTRAK system.
3. Privileges are divided into:
    a. System Privileges:
        - Administration
        - Records Registration
        - Workflow
        - Broadcast
        - Capture
        - Print Organization Reports
        - Print Administration Reports
        - DMS Integration
        - Dashboard – Generate Department Level Reports

        - Dashboard – Generate Organization Level Reports
        - Organizational Reports - Generate Department Level Reports
        - Organizational Reports - Generate Organization Level Reports
        - Data Reports - Generate Department Level Reports
        - Data Reports - Generate Organization Level Reports
        - Data Reports - Generate User Level Reports
        - Statistical Reports - Generate Department Level Reports
        - Statistical Reports - Generate Organization Level Reports
    b. Workflow Privileges:
        - Initiate
        - Consult
        - Assign Case
        - Close Case
        - Send to Committee
        - Full Search
        - Override OS
        - Tracking
        - DMS Integration
    c. Records Privileges:
        - Register
        - Full Search
        - DMS Integration
    d. Broadcast Privileges:
        - Initiate
        - Tracking
        - DMS Integration
4. For more details about the privileges, please refer to “DT3 Admin Manual”.

How to use the screens

To view the privileges given to you, please follow below steps:

1. Go to “User Preferences” menu from the main header.
2. Click “View Assigned Privileges” sub item, the following page with the privileges assigned to you will appear:

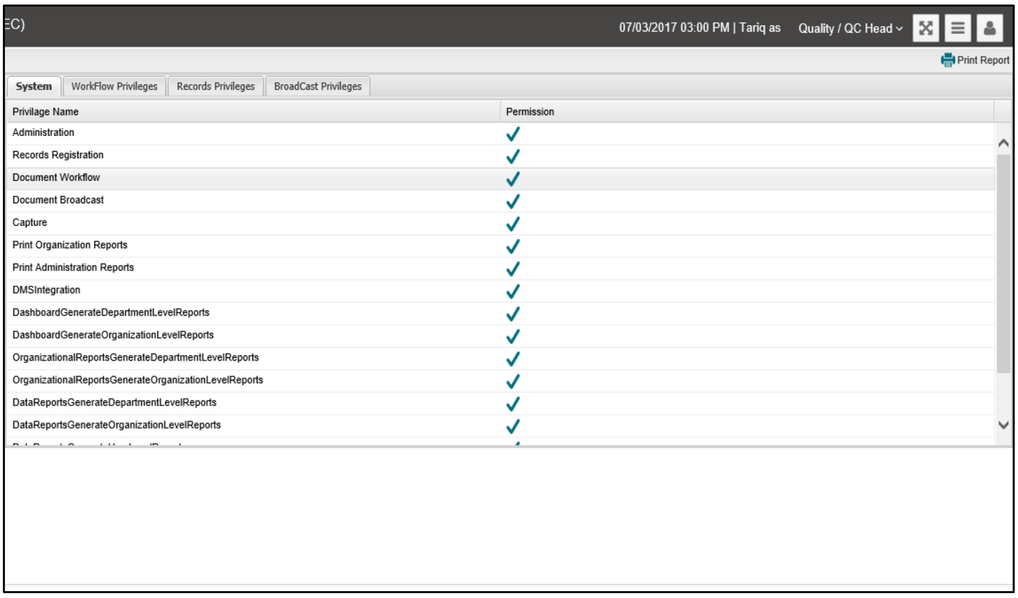


FIGURE 123: YOUR ASSIGNED SYSTEM PRIVILEGES

3. You can check System privileges assigned to you, Workflow Privileges, Records Privileges and Broadcast Privileges by clicking the related tab of each.
4. Once clicking "Workflow Privileges" tab, the following page will be displayed:

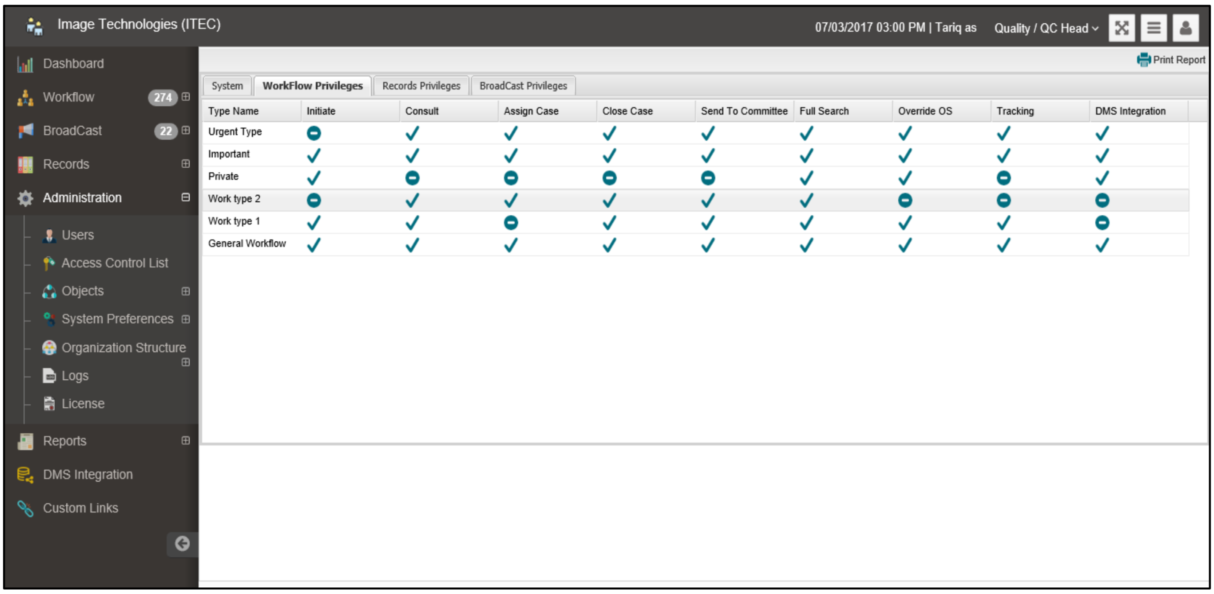


FIGURE 124: YOUR ASSIGNED WORKFLOW PRIVILEGES

Once clicking “Records Privileges” tab, the following page will be displayed:

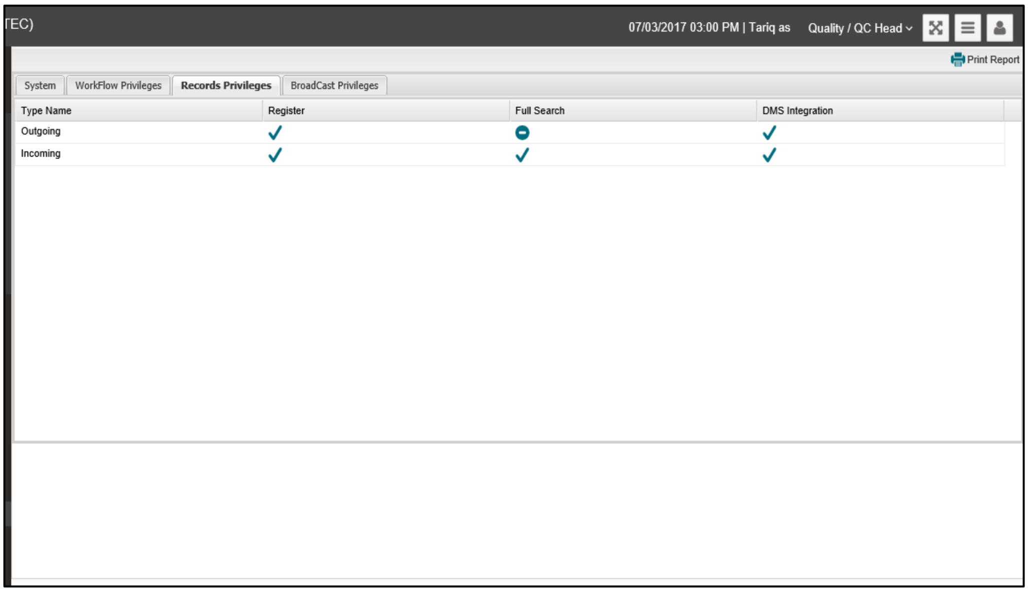


FIGURE 125: YOUR ASSIGNED RECORDS PRIVILEGES

6. Once clicking “Broadcast Privileges” tab, the following page will be displayed:

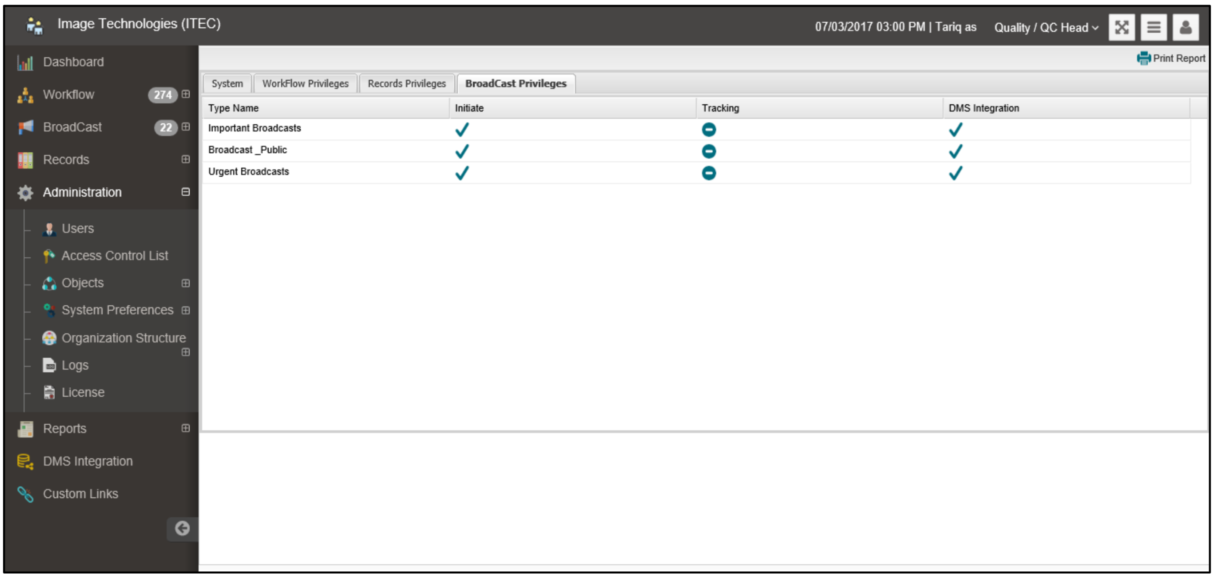


FIGURE 126: YOUR ASSIGNED BROADCAST PRIVILEGES

You can print out a report of your granted privileges by clicking 

button, the system will display the following popup:

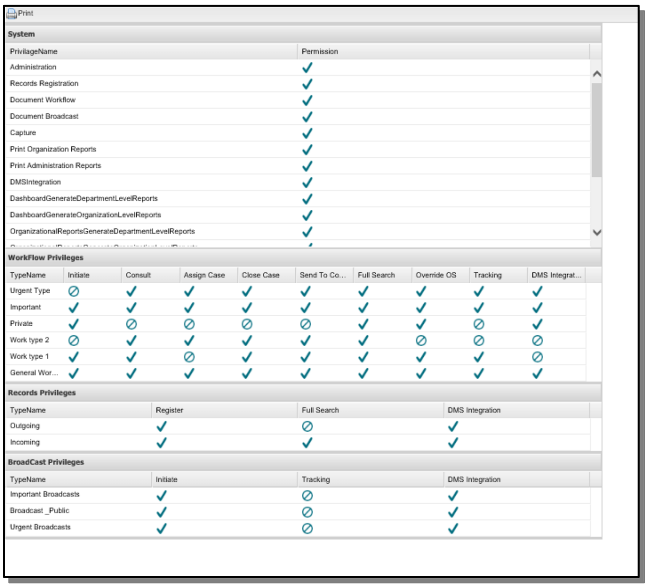


FIGURE 127: PRINTING YOUR ASSIGNED PRIVILEGES

Download Popup Application

Objectives

Popup application allows you to receive DocuTRAK alerts via popups. For more details about the triggers that prompt the system to send alerts to you, please refer to “Manage Alerts” section above.

1. Popup application will be installed at your local machine.
2. You will follow steps written in the figure below in order to install the popup application.

How to use the screens

To download DocuTRAK popup client application, please follow below steps:

1. Go to “User Preferences” menu from the main header to login to “user preferences” sub system.
2. Click “Popup Application” sub item, the following page with a link to download the popup application will appear:

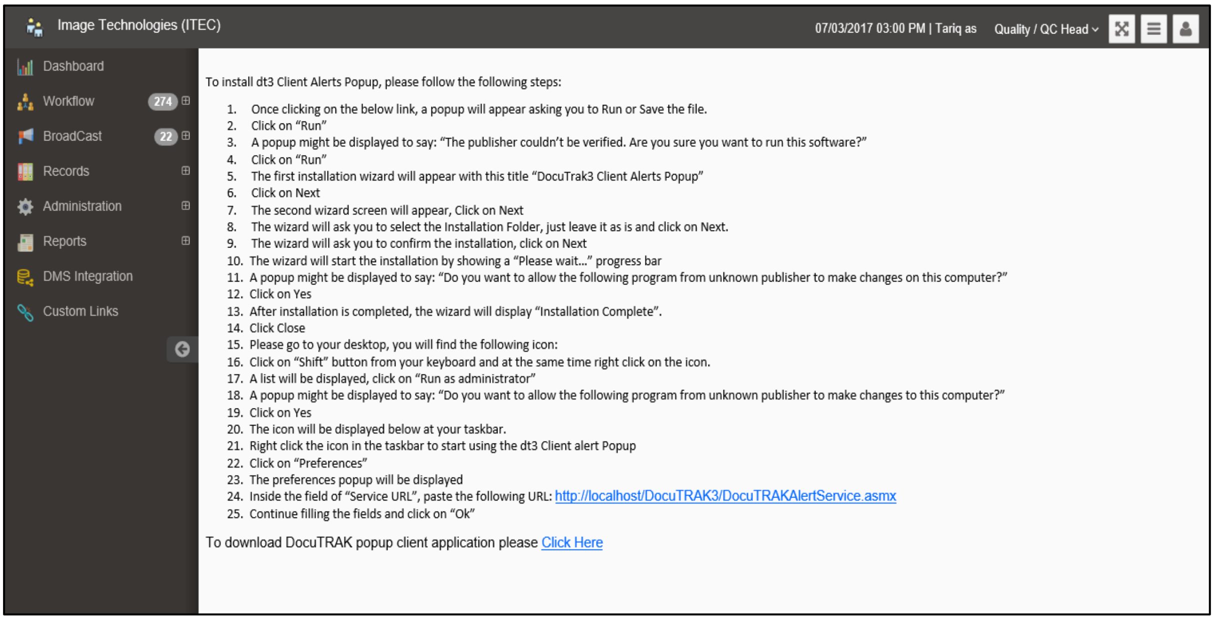


FIGURE 128: INSTALL POPUP APPLICATION

3. Click a link called "Click Here" at the bottom of above page and follow the written instructions to download the application.

Favorite List

Objectives

You can set the favorite list which most likely represent your daily contacts, this facilitates your work rather than searching for nodes each time you need to send workflow cases to them. The favorite list is applied only on Workflow module.

How to use the screens

To define your favorite list, please follow below steps:

1. Go to “User Preferences” menu from the main header to login to “user preferences” sub system.
2. Click “Favorite List” sub item, the following page will appear:

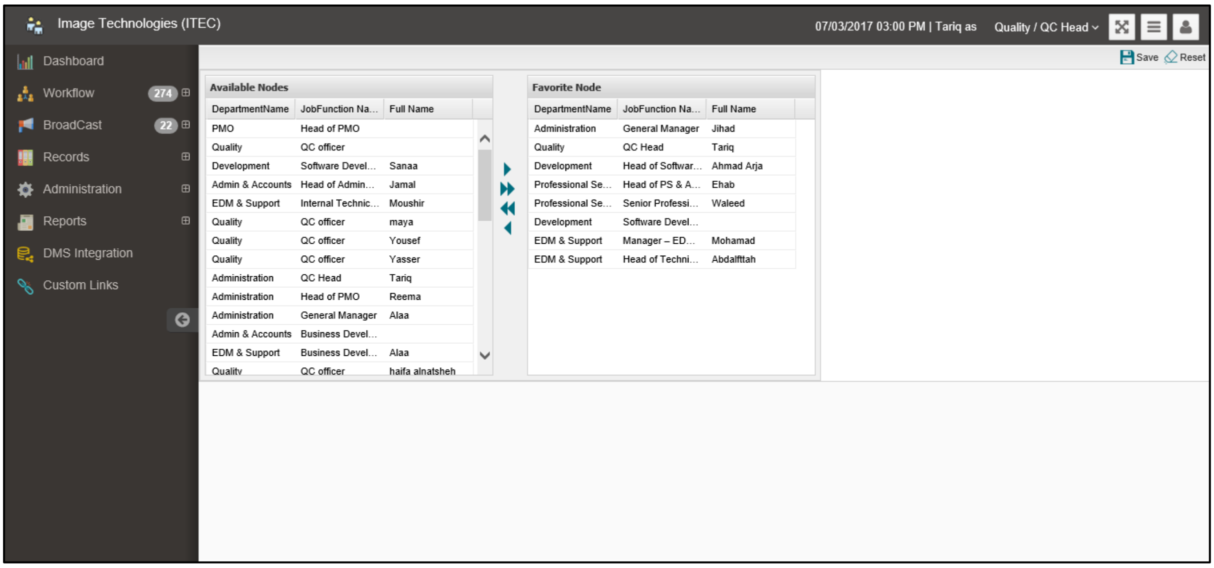


Figure 129: Your Favorite List

3. Insert the desired nodes from the available nodes at the left side into the "Favorite Nodes" list at the right side.

4. You will use your Favorite List through your address book while sending a workflow job. Select the option of "Favorite List" from the view mode of your address book, as shown below:

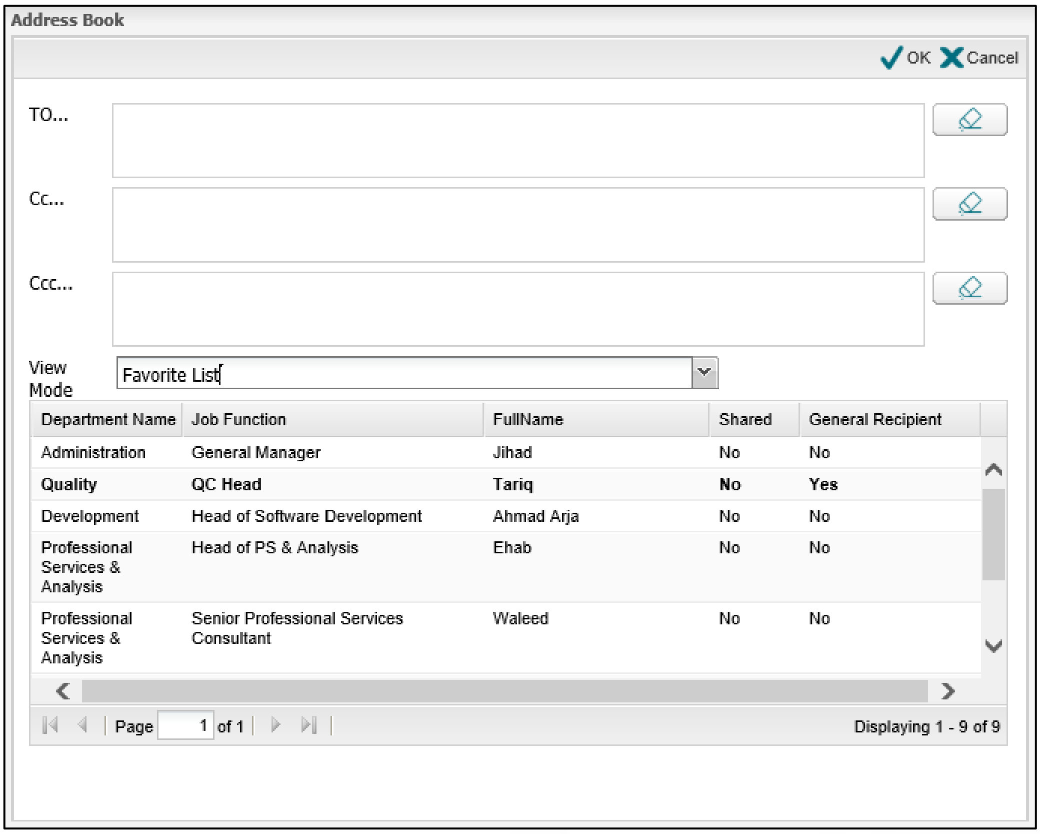


Figure 130: Favorite List as displayed in your Address Book

5. Your address book will display the nodes of your Favorite List as shown above.

Add Your Predefined Comments

Objectives

In addition to the predefined comments in Administration -> Objects -> Others -> Predefined Comments (refer to DT3 Admin Manual), local predefined comments for each user can also be configured in the user preferences section, so each user can add, edit, and remove his /her own predefined comments, but he/she will NOT be able to edit/remove the inherited ones (the predefined comments defined already by system administrators). Any changes will be saved on the level of each user. By using predefined comments, you will save a lot of time as you don't need to type the comment again and again each time you need it.

How to use the screens

1. **Create your New Predefined Comment**

To define your predefined comments, please follow below steps:

1. Go to "User Preferences" menu from the main header to login to "user preferences" sub system.
2. Click "Predefined Comments" sub item, the following page will appear to show the inherited predefined comments (the comments defined already by administrators):

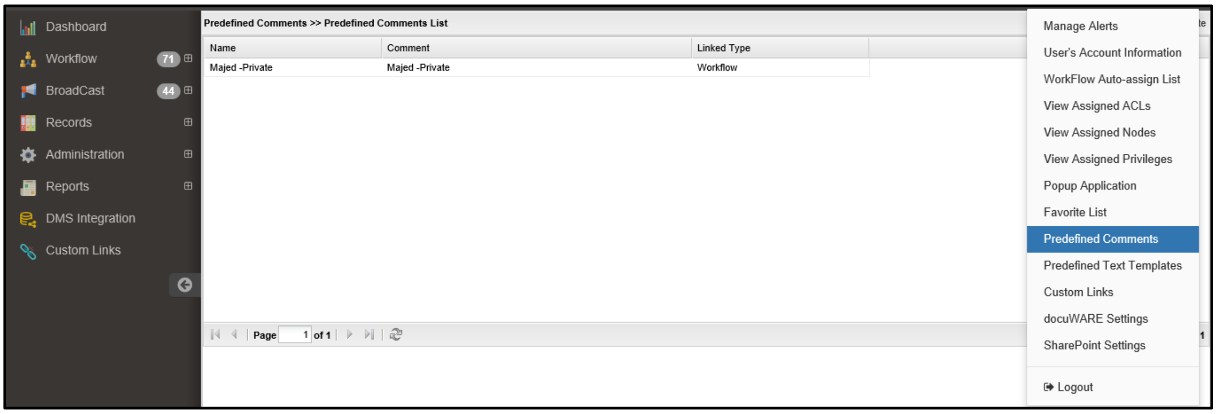


FIGURE 131: LIST OF PREDEFINED COMMENTS

Click “Create New” button, the following screen will appear:

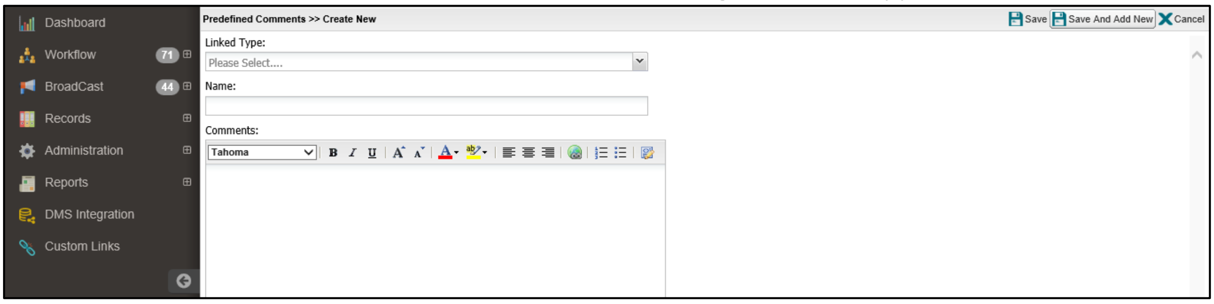


FIGURE 132: CREATE A NEW PREDEFINED COMMENT

3. To link the predefined comment with a Workflow/Broadcast, select one of them from “Linked Type” list.
4. Insert the name of comment into “Name” field.
5. Insert the text body into the “Comments” textbox.
6. Change the look and feel of the comment text.
7. Click “Save” button.
8. Click “Save and Add New” button to save the changes and start a new creation.

   Note: The user can only add a predefined comment of type private, Only the administrator can add a predefined comments of type public.

2. **Edit your Predefined Comment**

To edit a predefined comment, please follow below steps:

- Select the comment to be edited.
- Click “Edit” button, the below screen will appear.
- Make the required changes and click “Save” button.

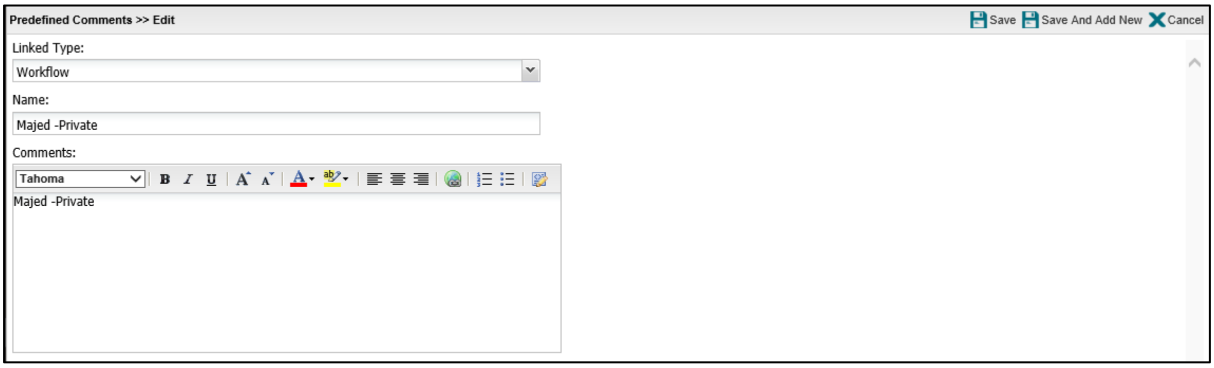


FIGURE 133: EDIT PREDEFINED COMMENT

3. **Delete your Predefined Comment**

To remove a predefined comment, please follow below steps:

1. Select the comment to be deleted.
2. Click “Delete” button.
3. A confirmation message will be shown, as displayed below.
4. Click “OK” to confirm the deletion, or “Cancel” to cancel the operation.

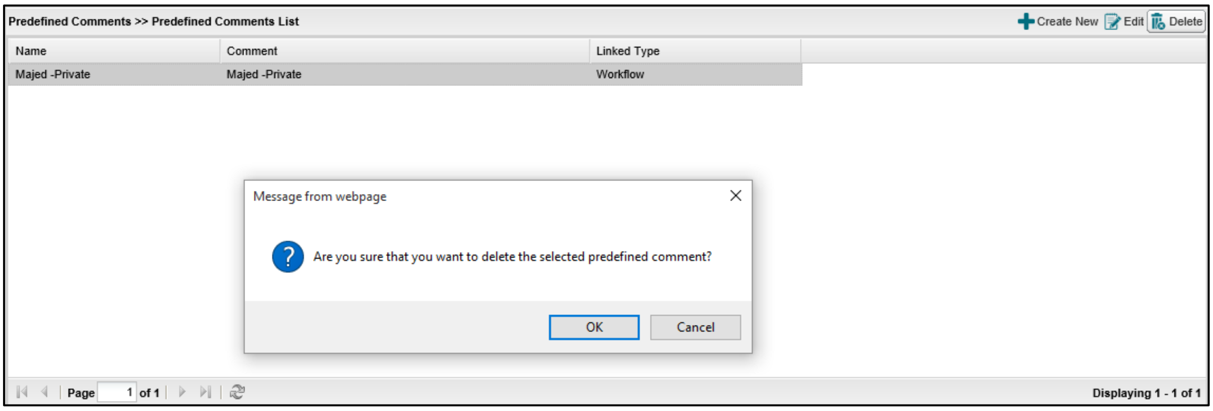


FIGURE 134: DELETE PREDEFINED COMMENT

Predefined Text Templates

Objectives

In addition to the Predefined Text Templates in Administration -> Objects -> Others -> Predefined Text Templates (refer to DT3 Admin Manual), local Predefined Text Templates for each user can also be configured in the user preferences section, so each user can add, edit, and remove his /her own Predefined Text Templates, but he/she will NOT be able to edit/remove the inherited ones (the predefined comments defined already by system administrators). Any changes will be saved on the level of each user. By using Predefined Text Templates, you will save a lot of time as you don't need to type the comment again and again each time you need it.

How to use the screens

1. **Create New Predefined Text Template**

To define your predefined Text Template, please follow below steps:

1. Go to "User Preferences" menu from the main header to login to "user preferences" sub system.
2. Click "Predefined Text Template" sub item, the following page will appear to show the inherited predefined Text Templates (the comments defined already by administrators):

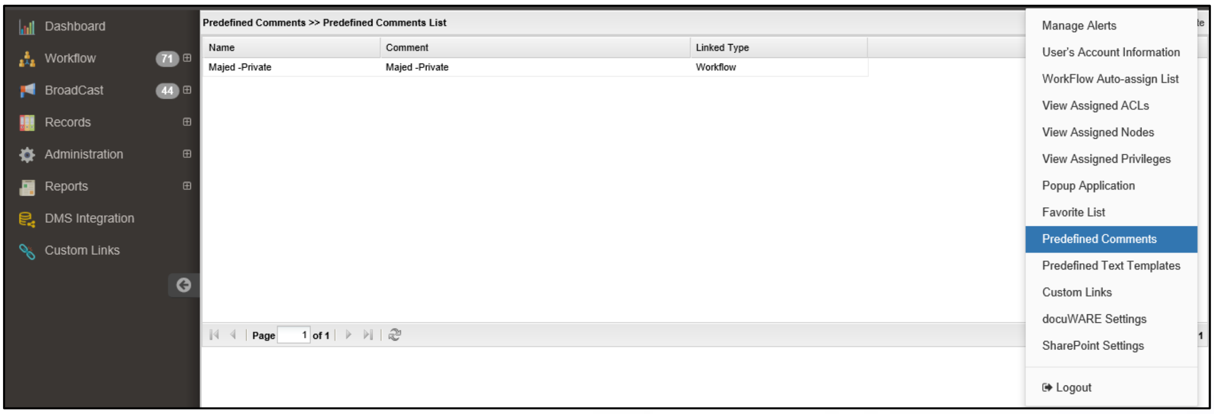


FIGURE 135: LIST OF PREDEFINED COMMENTS

Click “Create New” button, the following screen will appear:

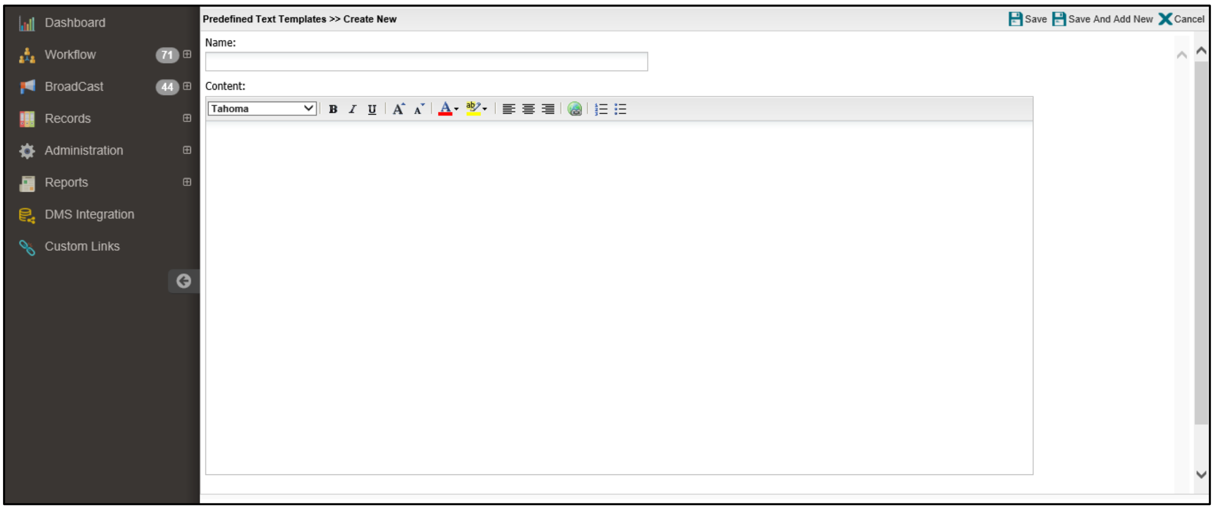


FIGURE 136: CREATE A NEW PREDEFINED TEMPLATE TEXT

3. Insert the name of Predefined Text Template into “Name” field.
4. Insert the text body into the “Comments” textbox.
5. Change the look and feel of the text.
6. Click “Save” button.
7. Click “Save and Add New” button to save the changes and start a new creation.

   Note: The user can only add a predefined comment of type private, Only the administrator can add a predefined comments of type public.

2. **Edit your Predefined Template Text**

To edit Predefined Text Template, please follow below steps:

- Select the comment to be edited.
- Click “Edit” button, the below screen will appear.
- Make the required changes and click “Save” button.

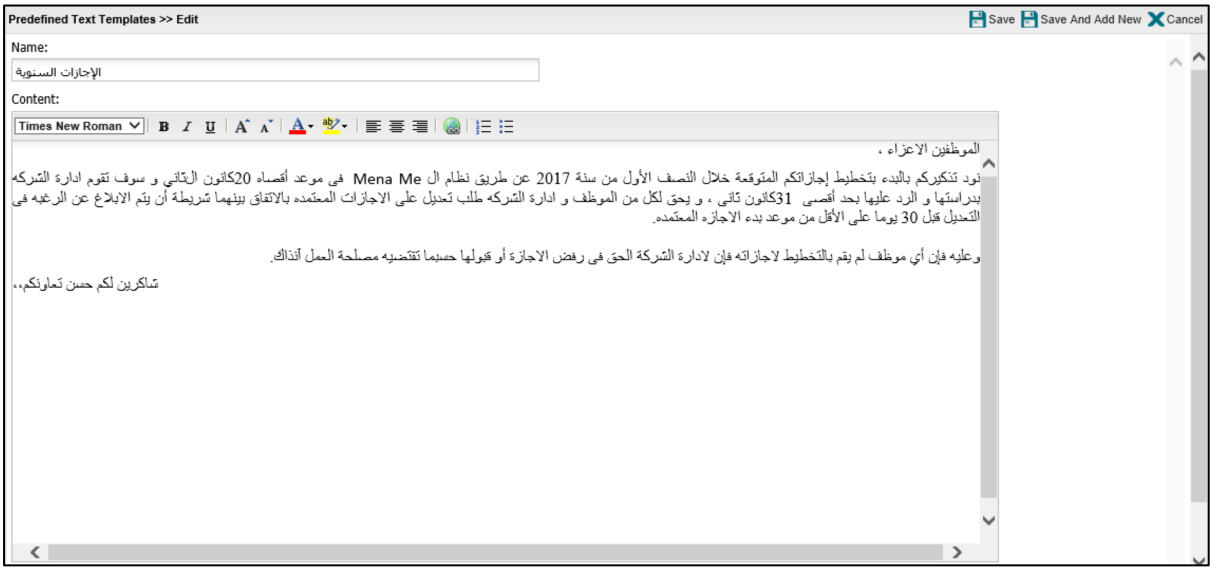


FIGURE 137: EDIT PREDEFINED TEMPLATE TEXT

3. **Delete your Predefined Template Text**

To remove Predefined Text Template, please follow below steps:

5. Select the Predefined Text Template to be deleted.
6. Click "Delete" button.
7. A confirmation message will be shown, as displayed below.
8. Click "OK" to confirm the deletion, or "Cancel" to cancel the operation.

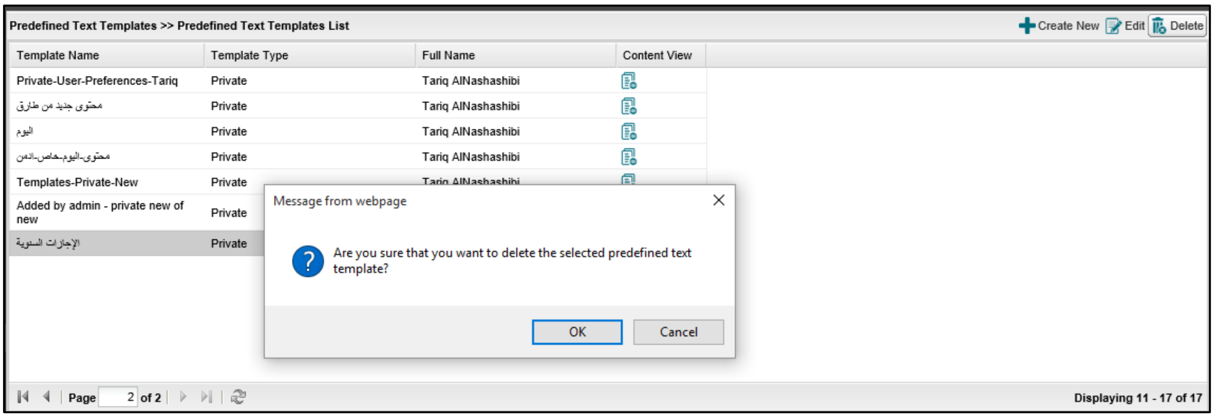


FIGURE 138: DELETE PREDEFINED TEXT TEMPLATE

Custom Links

Objectives

In addition to the custom links in Administration -> System Preferences -> Custom Links (refer to DT3 Admin Manual), local custom links for each user can also be configured in the user preferences section, so each user can add, edit, and remove his/her own custom links. Any changes will be saved on the level of each user.

How to use the screens

1. **Create your New Custom Link**

To define your custom links, please follow below steps:

1. Go to "User Preferences" menu from the main header to login to "user preferences" sub system.
2. Click "Custom Links" sub item, the following page will appear:

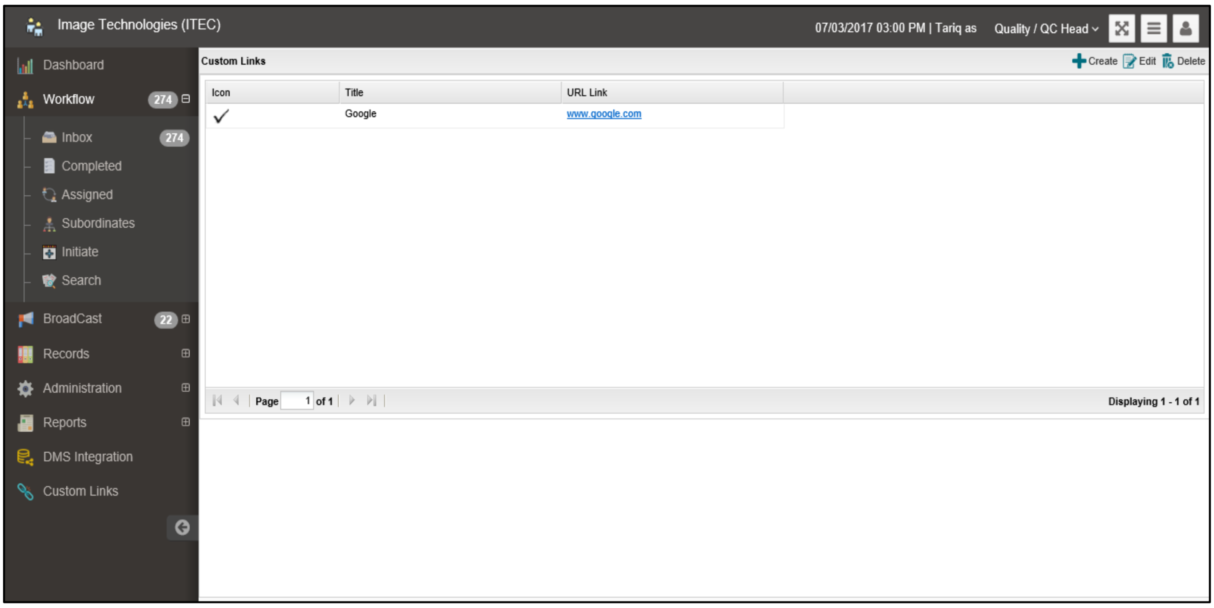


FIGURE 139: YOUR CUSTOM LINKS

3. Click "Create" button, the following page will appear:

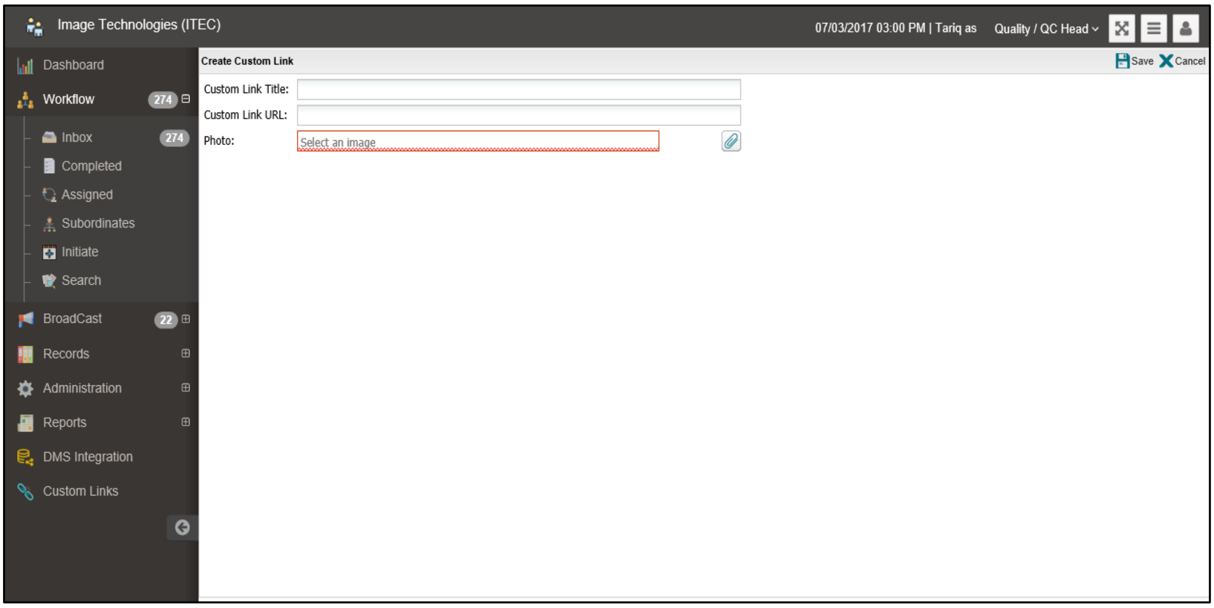


Figure 140: Create a new Custom Link

4. Each custom link will have a title, URL, and an icon, as displayed above.
5. Fill the required data, and click "Save"

2. **Edit your Custom Link**

To edit your custom link, please follow below steps:

1. Select the desired custom link from the list.
2. Click "Edit" button, the following page will appear to show the data of your selected Custom Link:

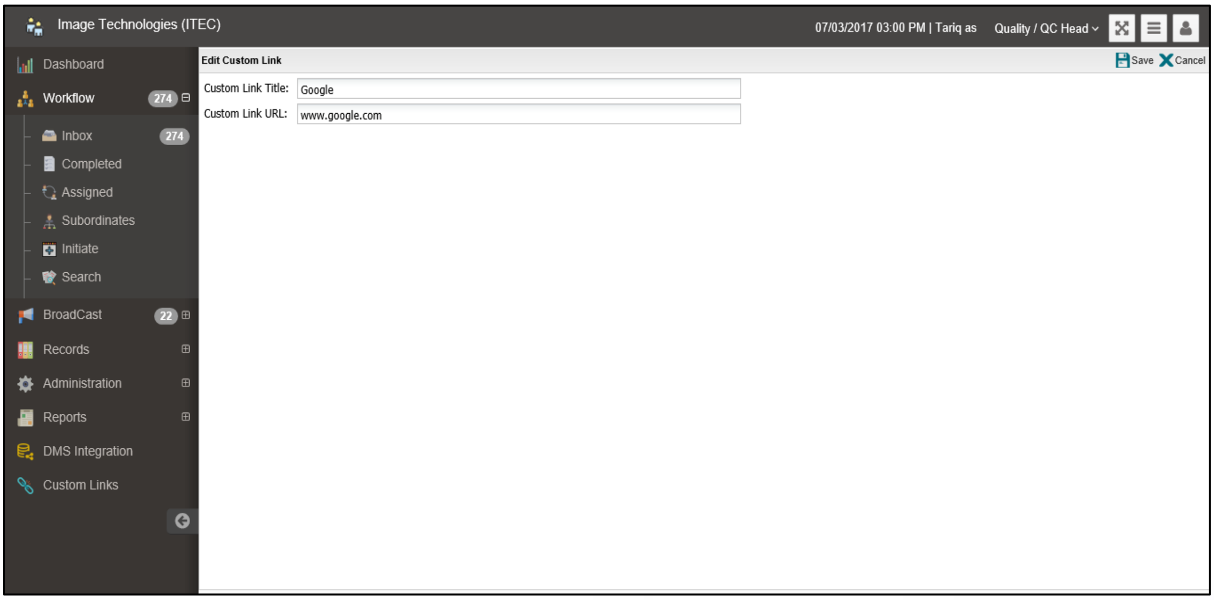


Figure 141: Edit your Custom Link

– Update the information as needed.
– Click "Save" button to save your changes, or "Cancel" to cancel the operation.

3. **Delete your Custom Link**

To delete your custom link, please follow below steps:

1. Select the desired Custom Link from the list.
2. Click "Delete" button.
3. A Confirmation message will be shown asking you to confirm the deletion.
4. Click "Ok" to delete your selected custom link, or "Cancel" to cancel the operation.

DocuWare Settings

Objectives

Each user can define his/her own DocuWare Settings. Any changes will be saved on the level of each user.

How to use the screens

To define your DocuWare settings, please follow below steps:

1. Go to "User Preferences" menu from the main header to login to "user preferences" sub system
2. Click "DocuWare Settings" sub item, the following page will appear.
3. Fill the following 2 fields through which you will be authenticated to edit documents in DocuWare:
   a. DocuWare Username
   b. DocuWare Password

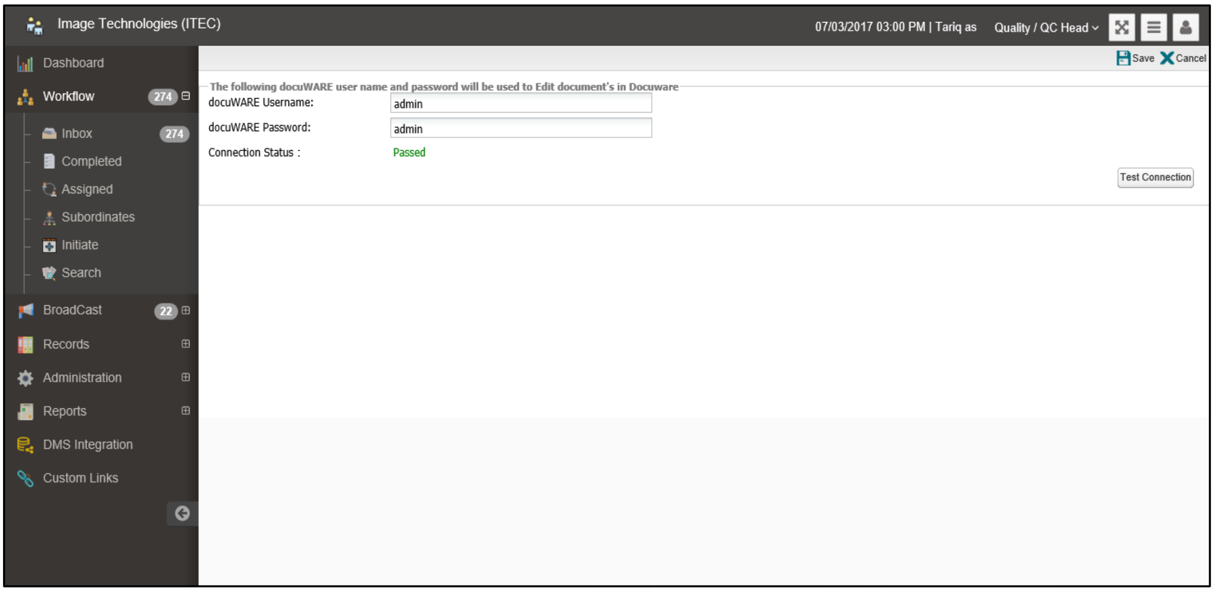


FIGURE 142: DOCUWARE SETTINGS

4. Click "Test Connection "
5. If connection succeeded, the connection status will be "Passed". Otherwise the connection status will be "Not Passed" as shown above.
6. Click "Save" button to save the changes, or "Cancel" to cancel the operation.

SharePoint Settings

Objectives

Each user can define his/her own SharePoint Settings. Any changes will be saved on the level of each user.

How to use the screens

To define your SharePoint settings, please follow below steps:

1. Go to "User Preferences" menu from the main header to login to "user preferences" sub system
2. Click "SharePoint Settings" sub item, the following page will appear.
3. Fill the following 2 fields through which you will be authenticated to view and edit documents in SharePoint:
    a. SharePoint Username
    b. SharePoint Password

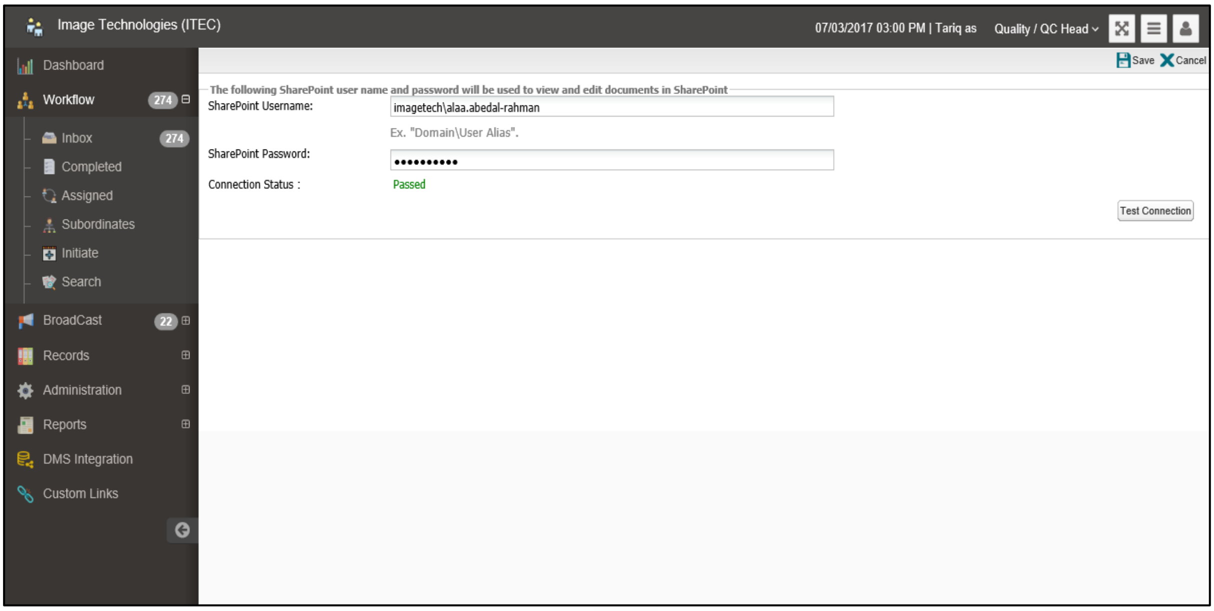


FIGURE 143: SHAREPOINT SETTINGS

4. Click “Test Connection”.
5. If connection succeeded, the connection status will be “Passed”. Otherwise the connection status will be “Not Passed” as shown above.

Click “Save” button to save the changes, or “Cancel” to cancel the operation.

Reports Module

Introduction

DocuTRAK3 reporting features give the user more efficient solutions to generate reports in more customized way with a better user experience.

- All reports are presented now in “Report Viewer” which will enable the user to export the report to PDF, Excel and Word formats.
- Under the report filtration page, the user can save the report search criteria so any user within the user node can load that criteria again.
- The new Report Viewer has page navigation, direct access by the page number; zoom in/out to the current pages in addition to printing out the report.
- Each report has a brief description to illustrate to the user what information are going to be generated throughout this report.
- The user can now specify to generate a report with/without detail by ticking the “Include Details” check box that exist under each report filtration page expect the “Status Report – All Modules”.
- The reports are getting generated based on the user logged in language.

How to use screens

1. Under each report filtration page, there will be a text field called “Report Title” or “Override Report Title” to enable the user to rename the report.
2. The user can change report duration date into dynamic intervals though the calendar under the filtration page.
3. Under the filtration page, the user can save the search criteria through the “Save” button.
4. Users who are under the same node can load the same search criteria through the “Load” button.
5. The user can reset the filtration search criteria through the “Reset” button.
6. The user can generate the report through the “Generate button”
7. Under the report template, the user can save the report to “PDF”, “Word” or “Excel” using the “Export” dropdown list.
8. Under the report template the user can handle the page side through the page width dropdown list.

Set a Report Title

- Go to Reports → any "Report Filtration" page, under "Report Properties" section, insert the desired title in the "Report Title" or "Override Report Title" field:

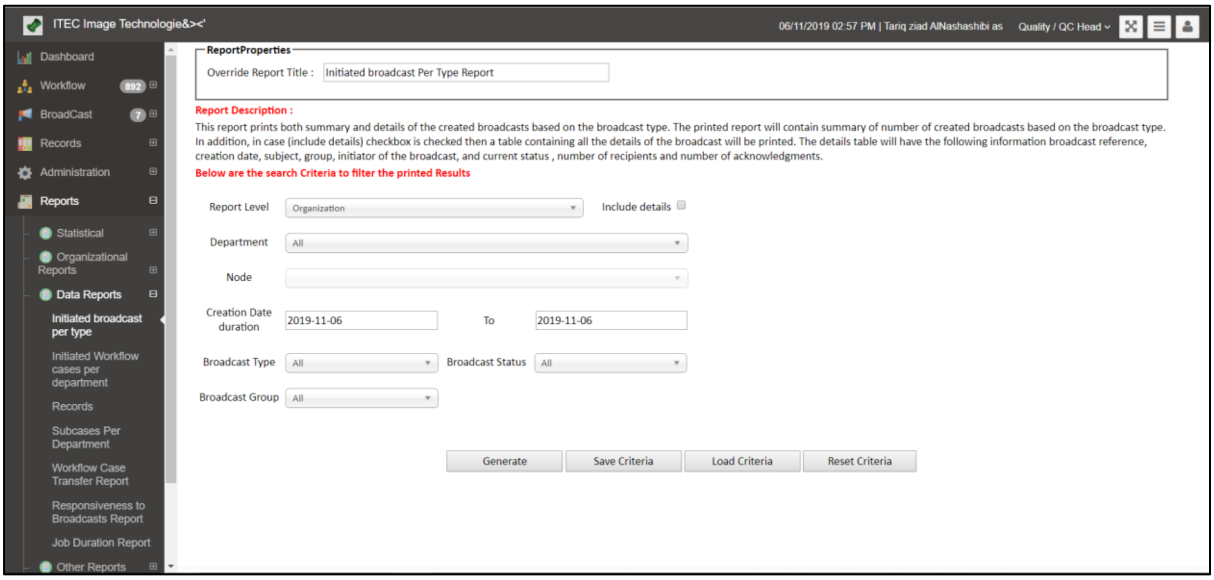


FIGURE 144: REPORT – FILTRATION PAGE

- Once the user inserts the report title and click "Generate" button the report title will display at the header of the report:

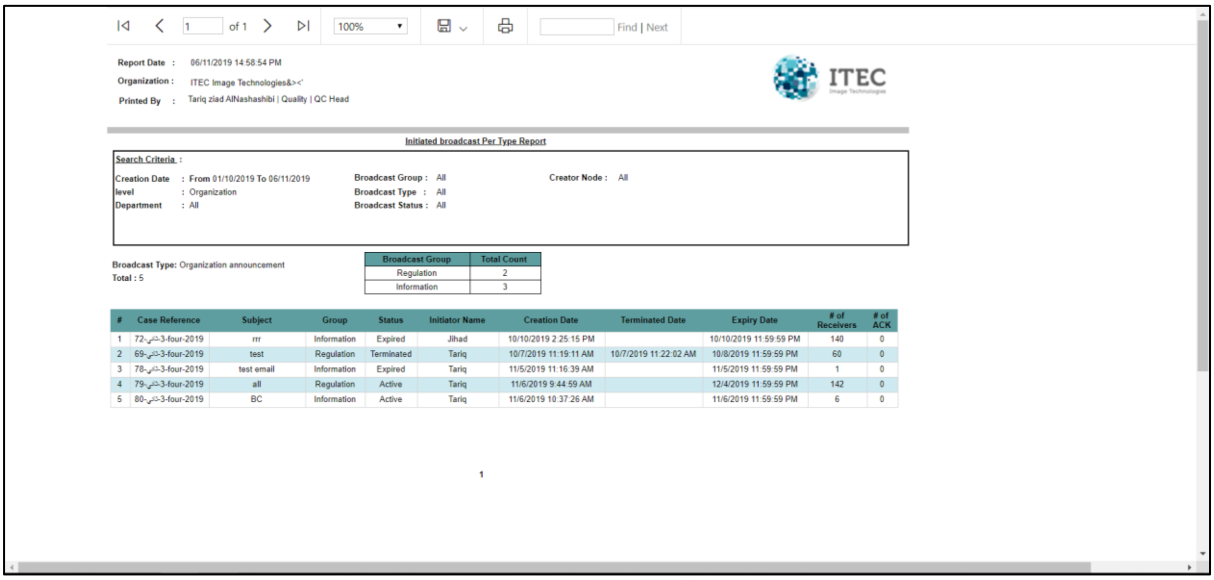


FIGURE 145: REPORT – REPORT TEMPLATE

Change the report duration:

- Go to Reports → Any Report Filtration page, change the reporting duration “From” and “To” from the calendar.

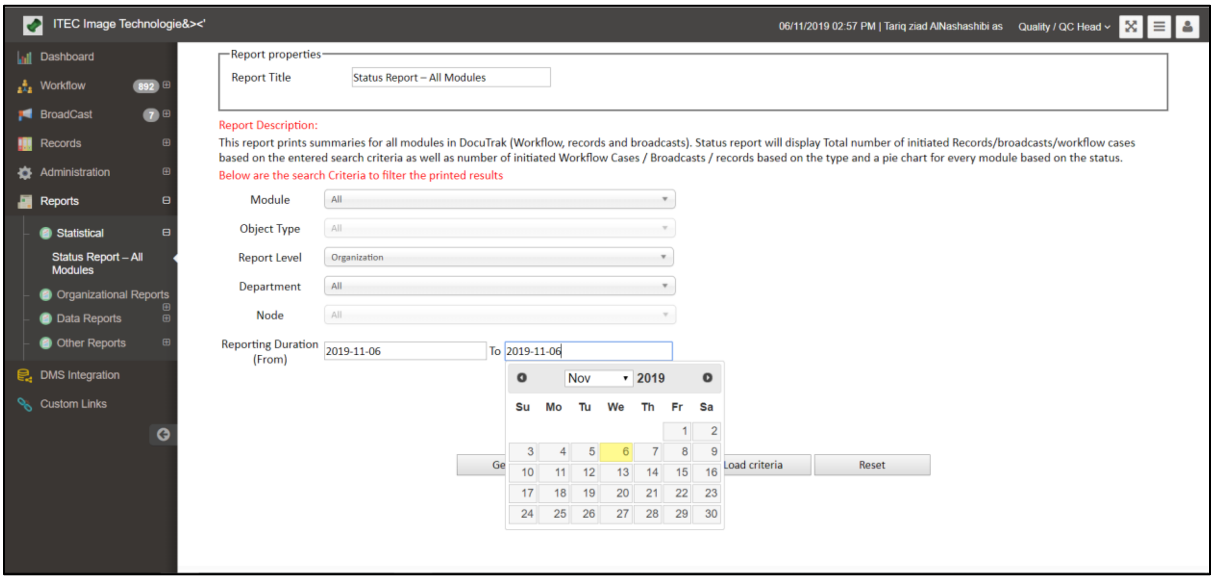


FIGURE 146: REPORT – REPORT FILTRATION

- Click “Generate” button and observe that the reporting duration will display in the report template under the search criteria section:

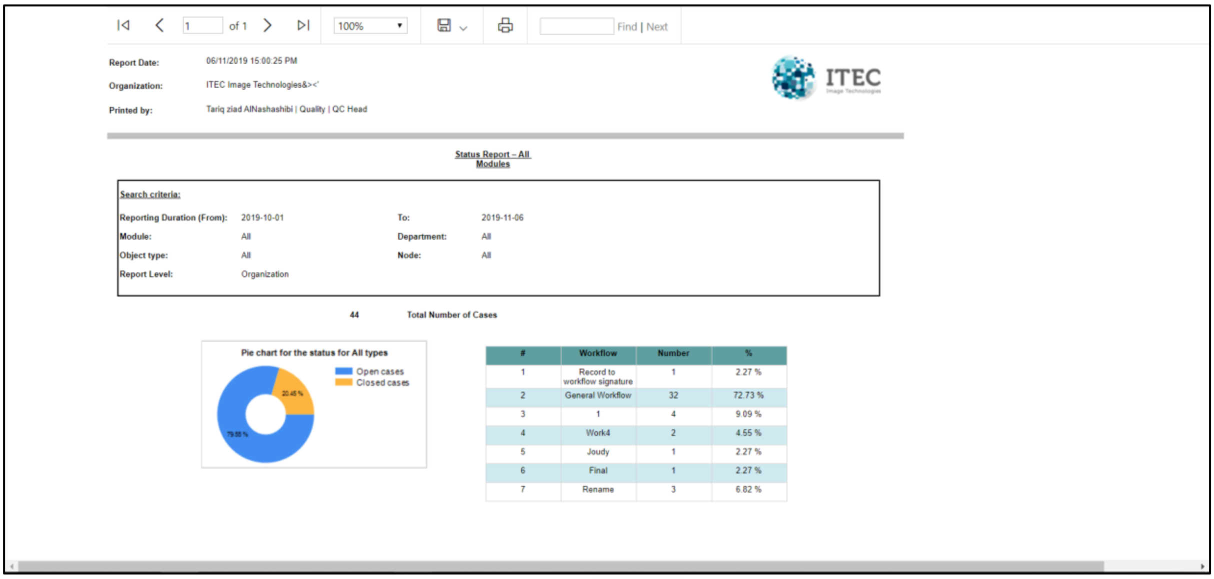


FIGURE 147: REPORT – REPORT DURATION

Export the report into Excel, PDF or Word format:

- Under report filtration page, generate a new report using your own search criteria to view the report template page:

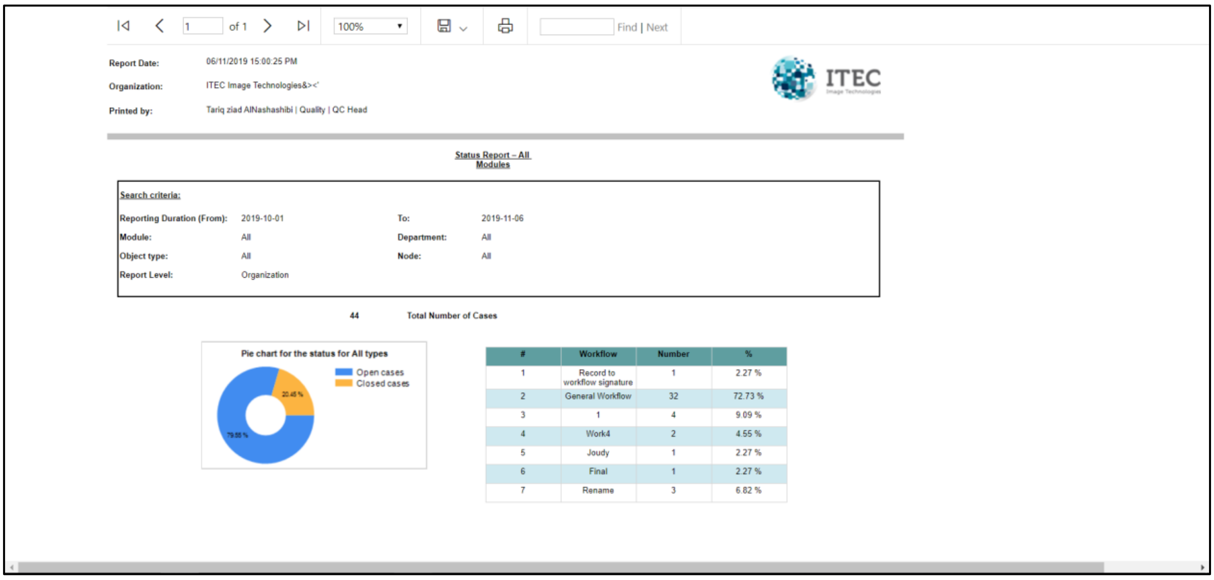


FIGURE 148: REPORT – REPORT RESULT CRITERIA

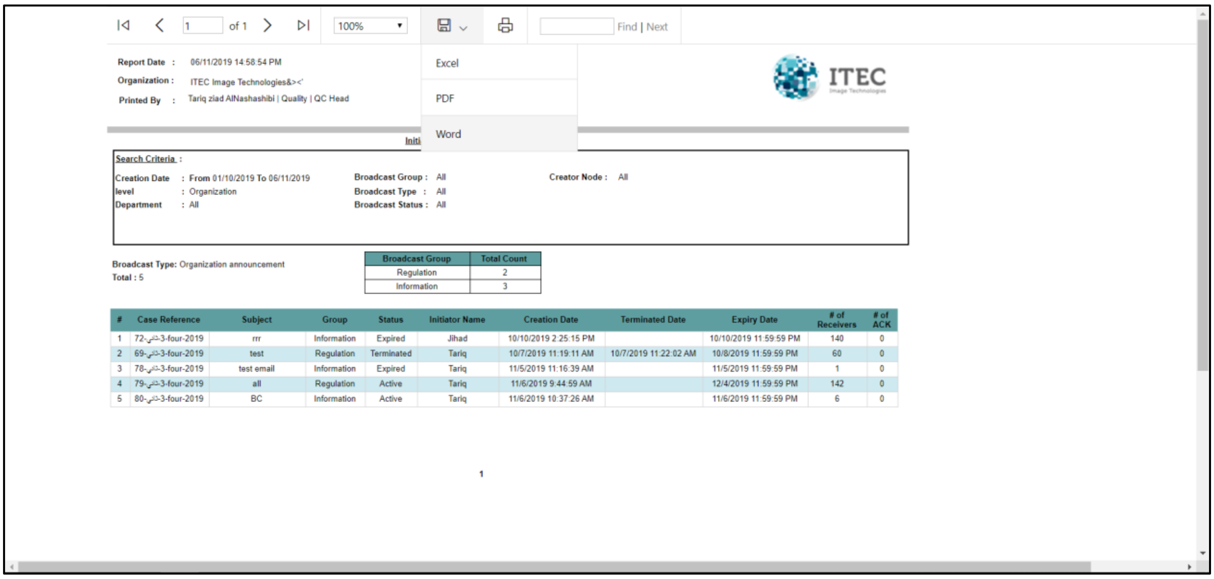


FIGURE 149: REPORT – REPORT EXPORTING

Under the report template, click the "Save As" icon to view the format list that the user can export the report into it, then choose any of the available formats:

Status Report – All modules

The status report will help end-users to generate and print summaries for all modules in the system (workflow, records, and broadcasts) or for one specific module.

The report will contain the following information:

• Pie chart displays the status of the [workflow cases/records/broadcasts] based on the type:

- Cases [Open/Closed/Recalled].
- Records [In progress/Registered/Archived/Deleted].
- Broadcast [Active/Expired/Terminated].

• Summary table for the number of created (workflow cases/records/broadcasts) based on the type.

• Total number of created (workflow cases/records/broadcasts).

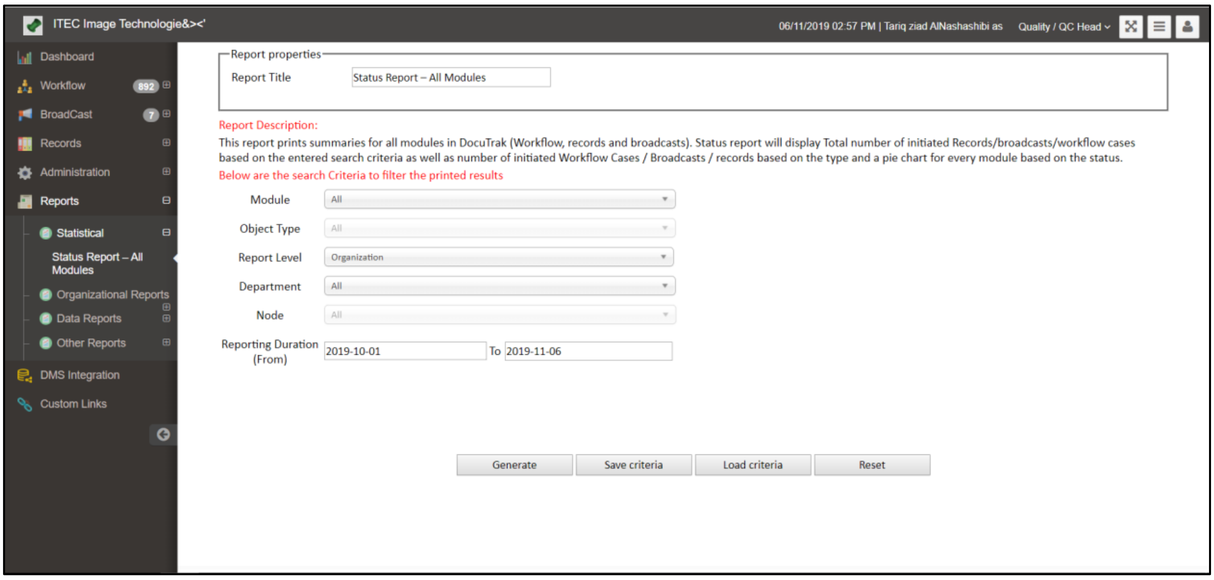


FIGURE 150: REPORT – STATUS REPORT – ALL MODULES – SEARCH CRITERIA

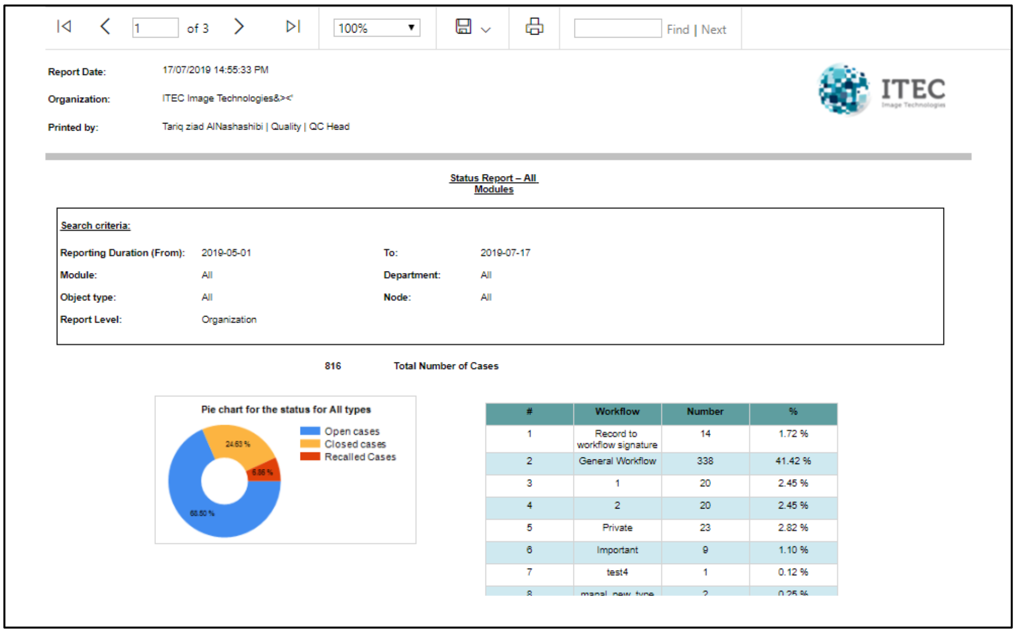


FIGURE 151: REPORT – STATUS REPORT – ALL MODULES – RESULTS CRITERIA

Initiated workflow cases per department report

Through this report, user will be able to print a summary for the number of created, Recalled, and closed workflow cases per department. The report will be grouped by the department where every department will have a summary table for the number of initiated cases based on the type, as well as a detailed table (if "Include details" option is checked) for the initiated cases. Cases that open, closed, and recalled will displayed in this report.

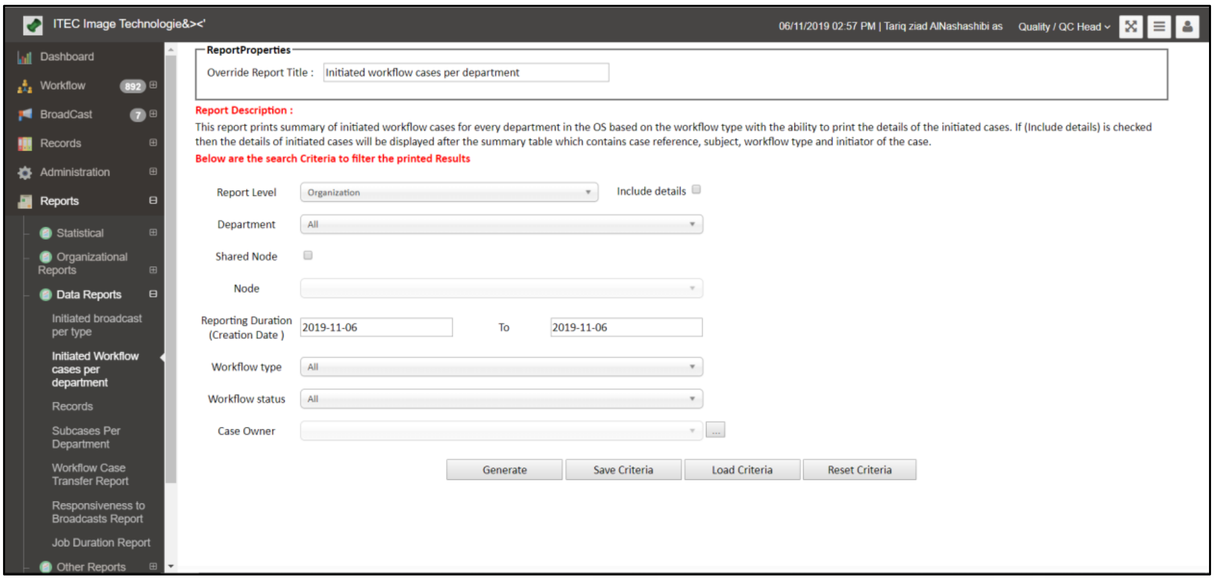


FIGURE 152: REPORT – INITIATED WORKFLOW CASES PER DEPARTMENT – SEARCH

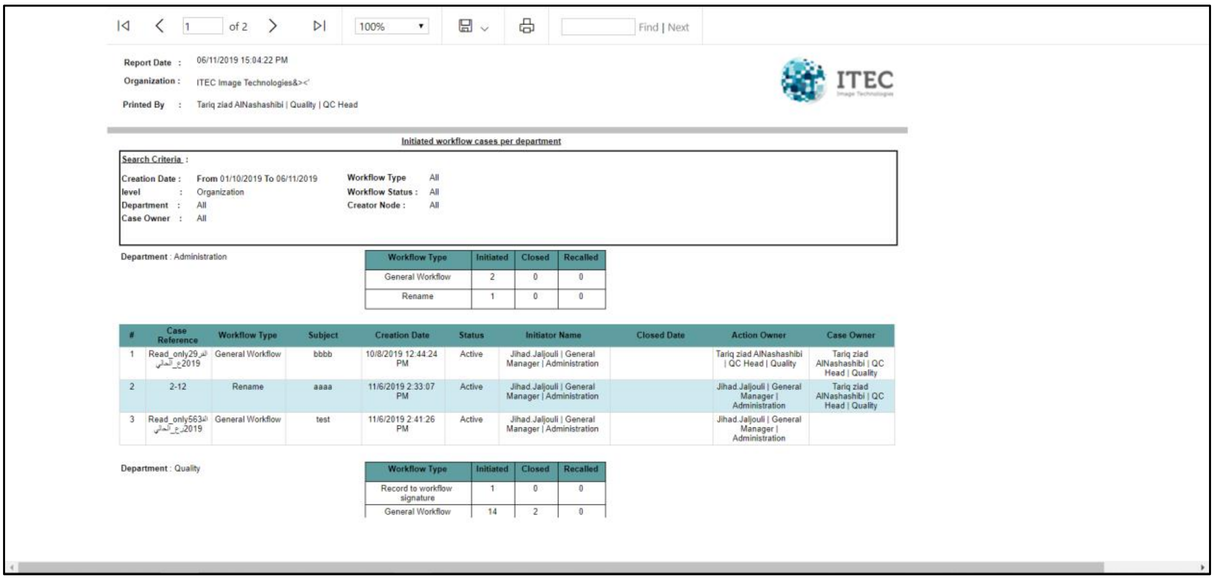


FIGURE 153: REPORT – INITIATED WORKFLOW CASES PER DEPARTMENT – RESULTS

Jobs duration Report

Through this report, the user will be able to print the jobs performed by the node with the duration of the job (duration = action date - received date). The report will be grouped by the department where every department will have summary table for the total number of performed jobs, and average duration taken on the jobs per workflow type. In addition, a detailed table will be printed (if "Include details" option is checked) for the performed jobs on the workflow cases with the duration of the job compared with (organization average, department average or peers average "users with the same job title and department") based on the defined search criteria.

Notes: 1. The Duration in the generated report will exclude the Weekend in the job duration report.

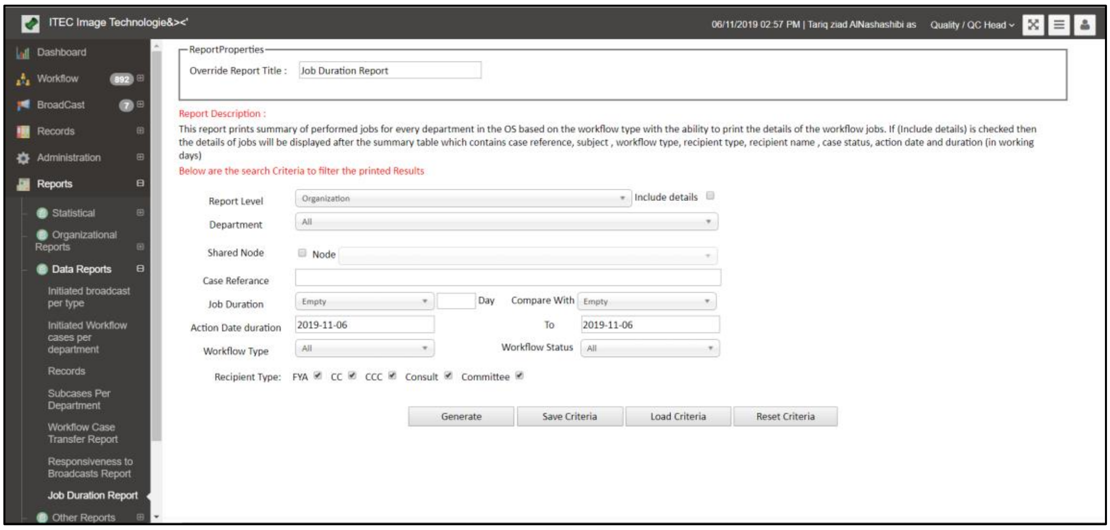


FIGURE 154: REPORT – JOB DURATION – SEARCH CRITERIA

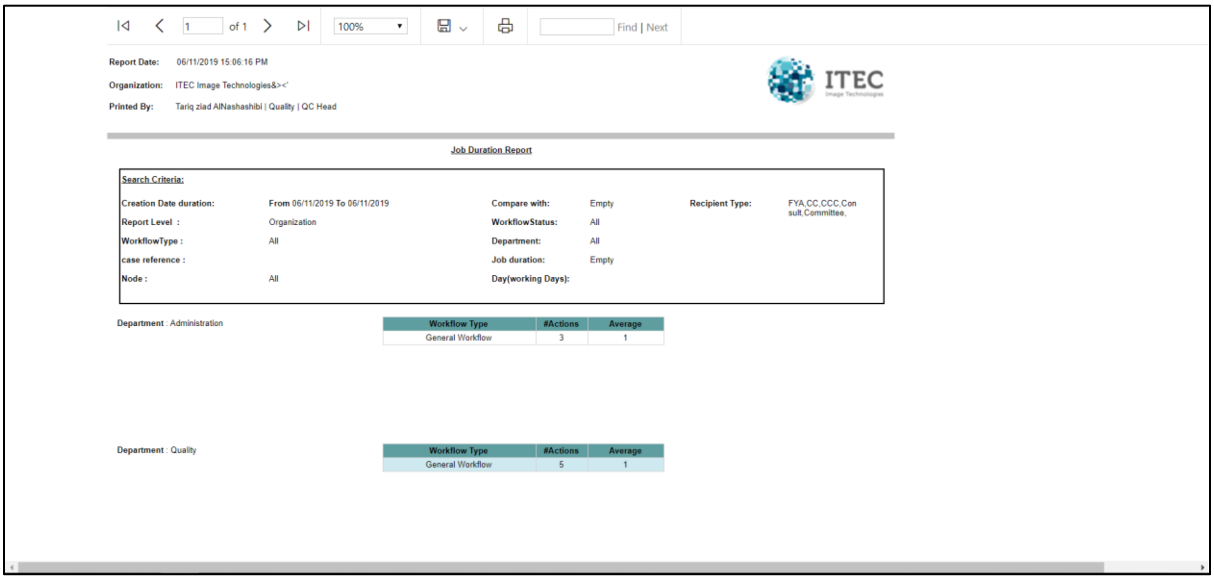


FIGURE 155: REPORT – JOB DURATION – RESULTS CRITERIA

Records Report

Through this report, the user will be able to print the details of created records grouped by the record type, where every type will have a summary for the total number of created records as well as a detailed table for the created records (If “Include details” option is checked).

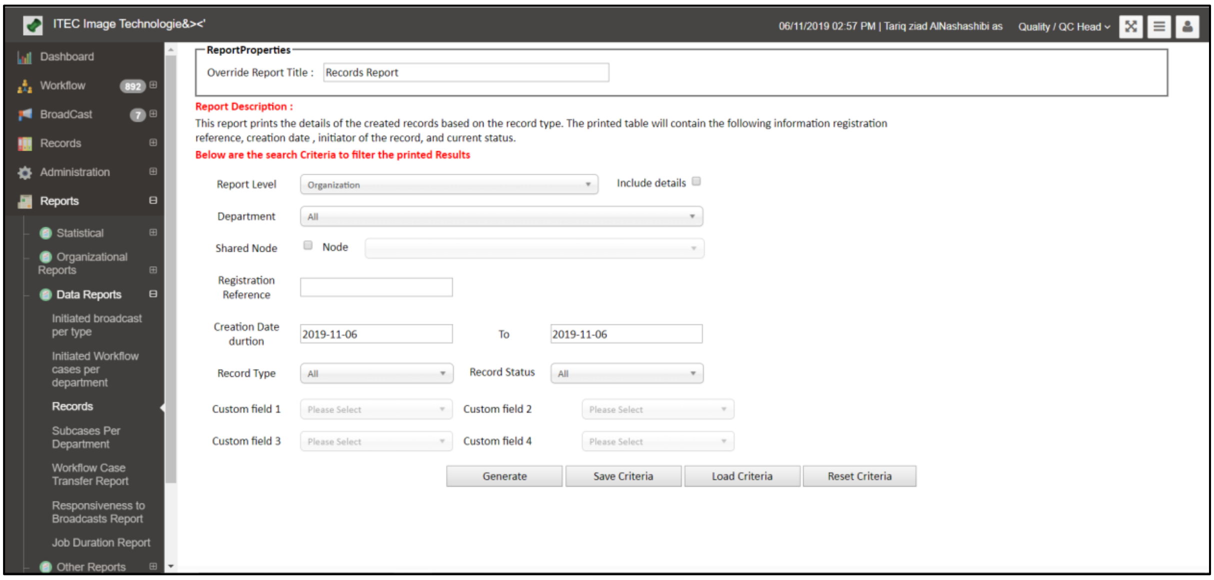


FIGURE 156: REPORT – RECORDS – SEARCH CRITERIA

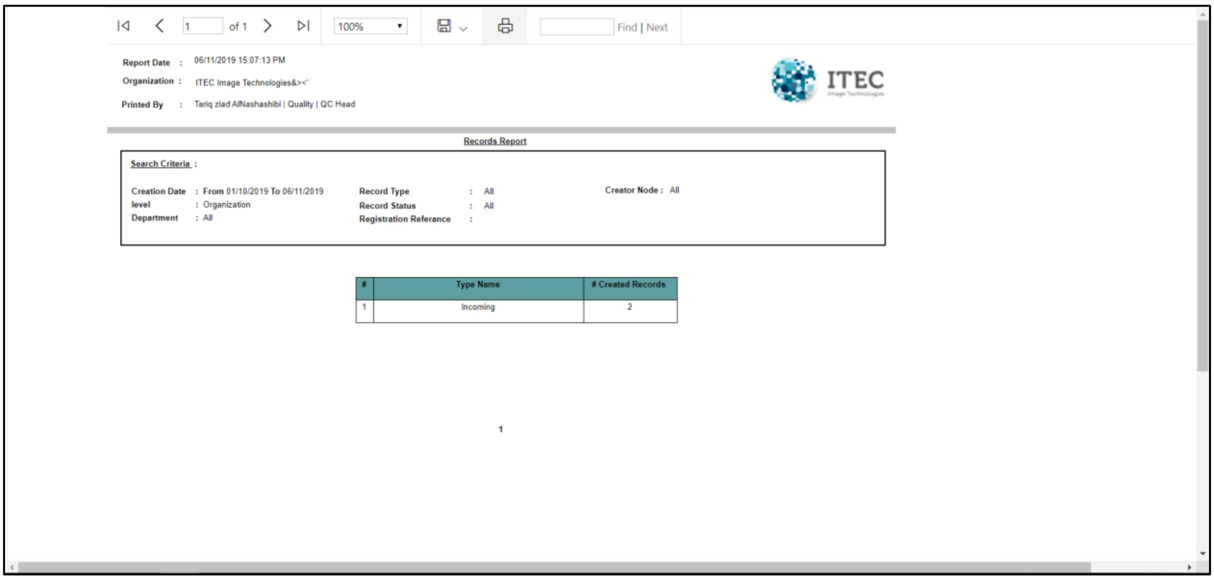


FIGURE 157: REPORT – RECORDS – RESULT CRITERIA

Subcases per department report

Through this report, the user will be able to print a summary of the Subcases per department with the ability to print the subcases generated from the original case. Moreover, if “Include details” checkbox is checked then all the details of subcases will be printed like the subcase reference, the status of the subcase and the current owner of the case.

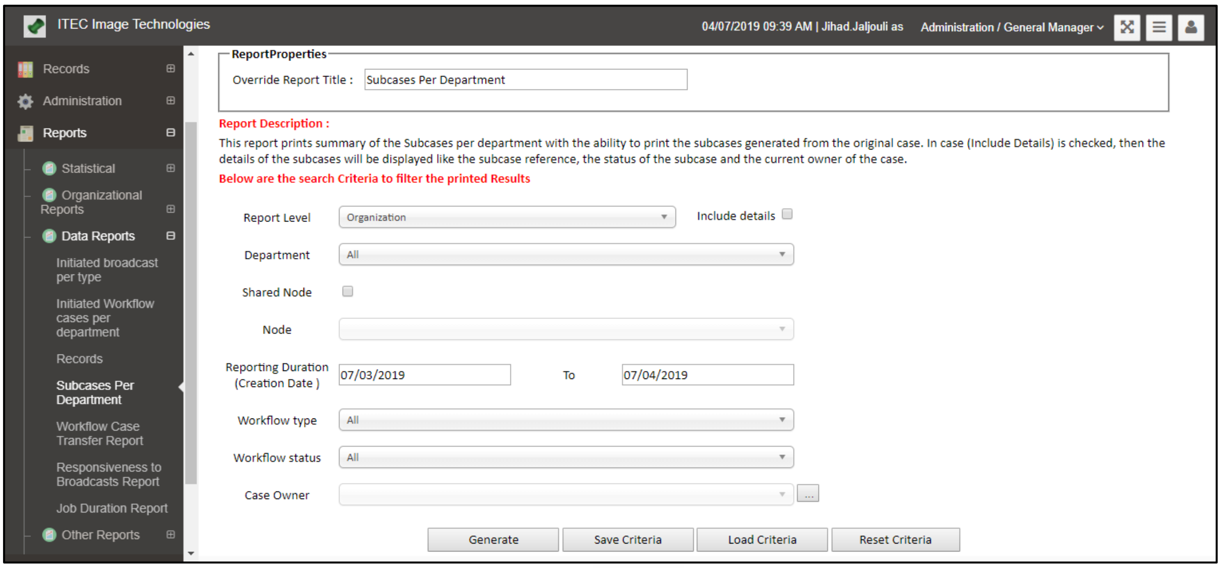
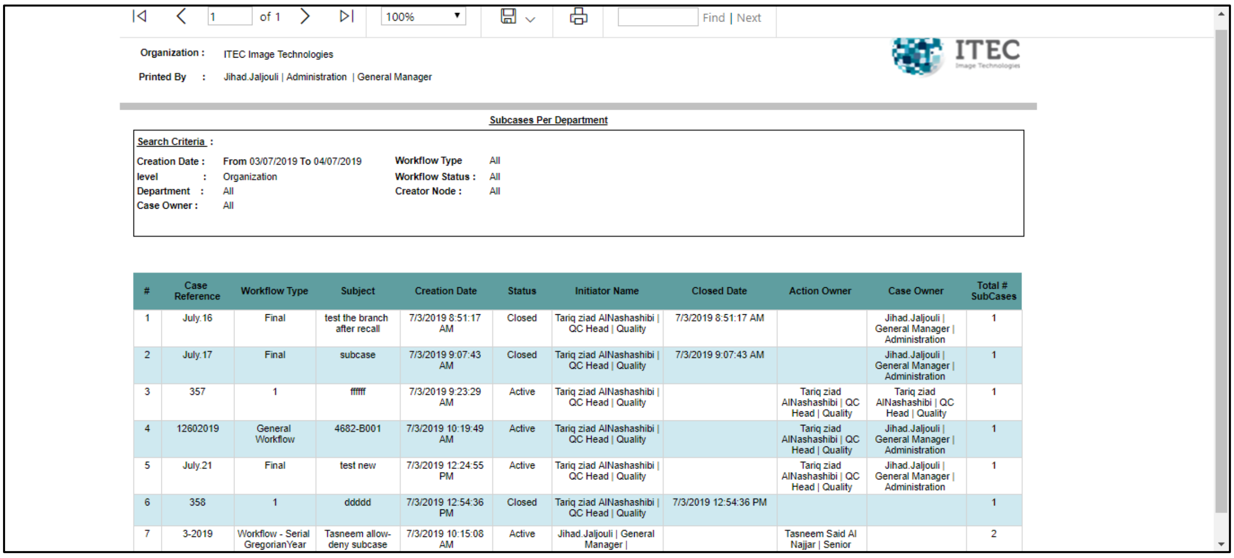


FIGURE 158: REPORT – SUBCASES PER DEPARTMENT – SEARCH CRITERIA



Organization : ITEC Image Technologies

Printed By : Jihad.Jaljouli | Administration | General Manager

Subcases Per Department

Search Criteria :

Creation Date : From 03/07/2019 To 04/07/2019 — Workflow Type All

level : Organization — Workflow Status : All

Department : All — Creator Node : All

Case Owner : All

#	Case Reference	Workflow Type	Subject	Creation Date	Status	Initiator Name	Closed Date	Action Owner	Case Owner	Total # SubCases
1	July.16	Final	test the branch after recall	7/3/2019 8:51:17 AM	Closed	Tariq ziad AlNashashibi | QC Head | Quality	7/3/2019 8:51:17 AM		Jihad.Jaljouli | General Manager | Administration	1
2	July.17	Final	subcase	7/3/2019 9:07:43 AM	Closed	Tariq ziad AlNashashibi | QC Head | Quality	7/3/2019 9:07:43 AM		Jihad.Jaljouli | General Manager | Administration	1
3	357	1	ffffff	7/3/2019 9:23:29 AM	Active	Tariq ziad AlNashashibi | QC Head | Quality		Tariq ziad AlNashashibi | QC Head | Quality	Tariq ziad AlNashashibi | QC Head | Quality	1
4	12602019	General Workflow	4682-B001	7/3/2019 10:19:49 AM	Active	Tariq ziad AlNashashibi | QC Head | Quality		Tariq ziad AlNashashibi | QC Head | Quality	Jihad.Jaljouli | General Manager | Administration	1
5	July.21	Final	test new	7/3/2019 12:24:55 PM	Active	Tariq ziad AlNashashibi | QC Head | Quality		Tariq ziad AlNashashibi | QC Head | Quality	Jihad.Jaljouli | General Manager | Administration	1
6	358	1	ddddd	7/3/2019 12:54:36 PM	Closed	Tariq ziad AlNashashibi | QC Head | Quality	7/3/2019 12:54:36 PM			1
7	3-2019	Workflow - Serial GregorianYear	Tasneem allow-deny subcase	7/3/2019 10:15:08 AM	Active	Jihad.Jaljouli | General Manager |		Tasneem Said Al Najjar | Senior		2

FIGURE 159: REPORT – SUBCASES PER DEPARTMENT – RESULT CRITERIA

Workflow case transfer report

Through this report, the user will be able to generate the workflow cases which have been initiated by a certain department and sent to other departments for certain actions. This report displays: No. of actions taken on each case, its current status, and other important information. The "No. of Steps" counts the number of times a case has been initiated/sent, reopened, forwarded, and/or replied to. However, the (Initiate/Send, Forward, Reply, and Reply to All) will be discarded when recalling a case or a subcase.

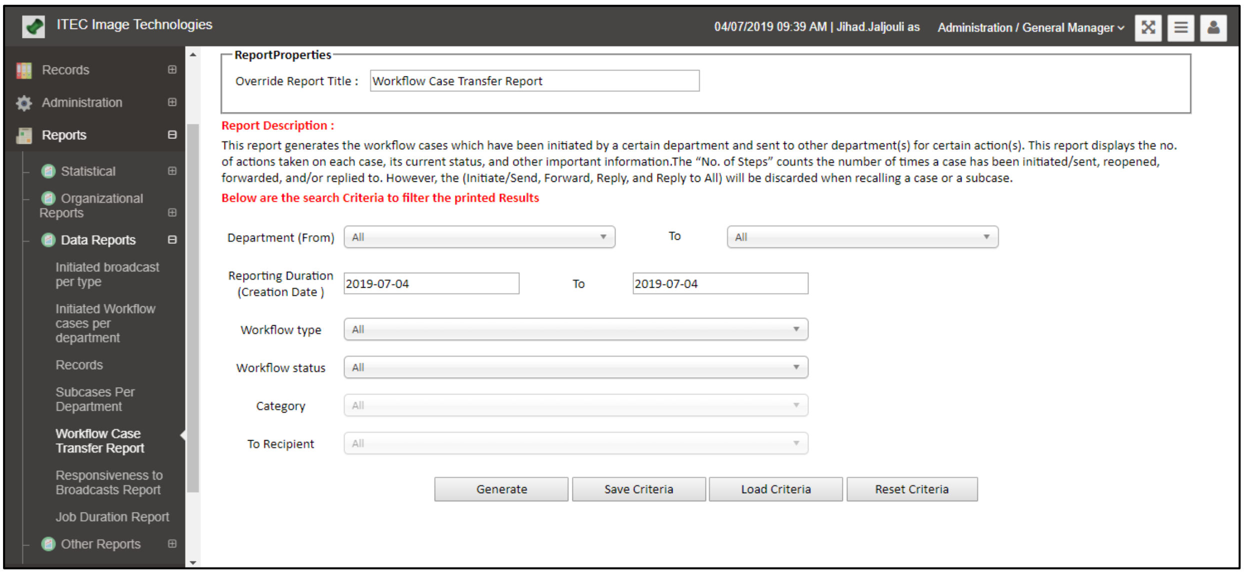


FIGURE 160: REPORT – WORKFLOW CASE TRANSFER REPORT – SEARCH CRITERIA

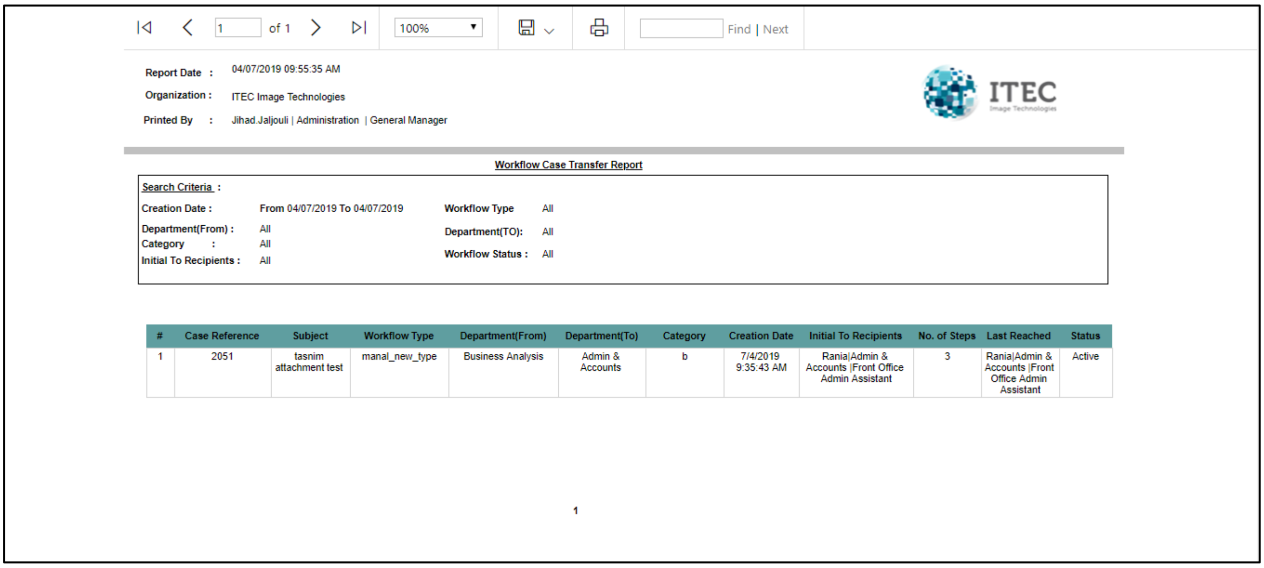


Figure 161: Report – Workflow case transfer report – Result criteria

Initiated broadcast per type report

Through this report, the user will be able to print the initiated broadcasts grouped by the type of the broadcast. A summary table will be printed to display the number of initiated broadcasts for every type based on the broadcast group (information, regulation). Moreover, if "Include details" checkbox is checked then all the details of the broadcast will be printed.

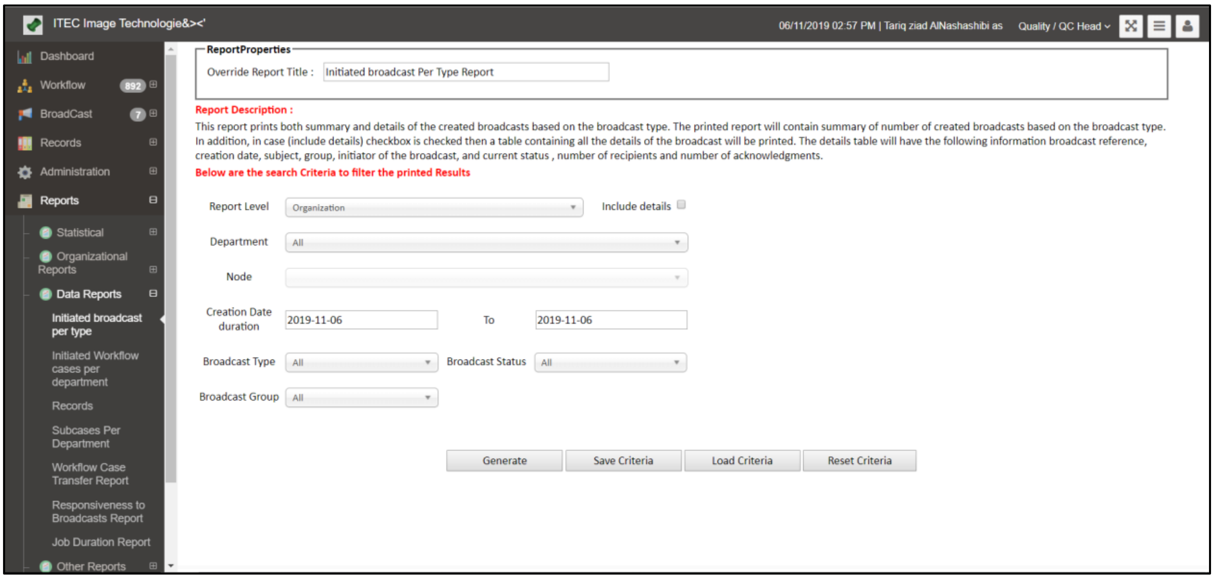


Figure 162: Report – Initiate broadcast per type – Search criteria

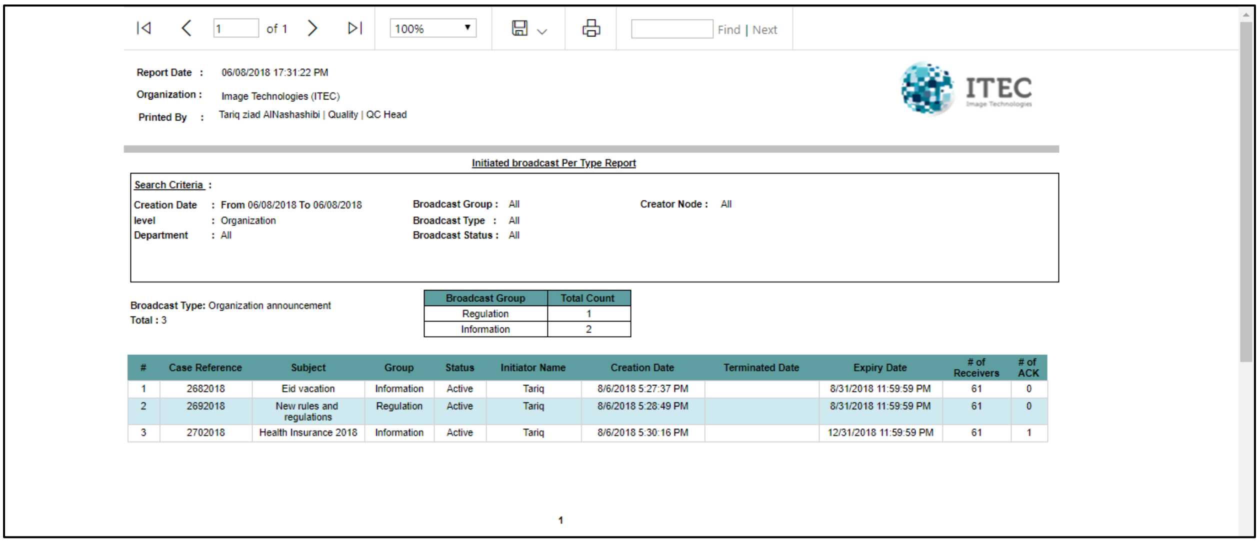


Figure 163: Report – Initiate broadcast per type – Result criteria

Responsiveness to broadcasts report

Through this report, the user will be able to print the initiated broadcasts along with the responsiveness percentage to the broadcast. The printed information will have the basic information of the broadcast and the number of recipients: number of recipients who responded on time and number of recipients responded after the due date. Moreover, if “Include details” checkbox is checked, then all the details of the recipients will be printed grouped by the broadcast.

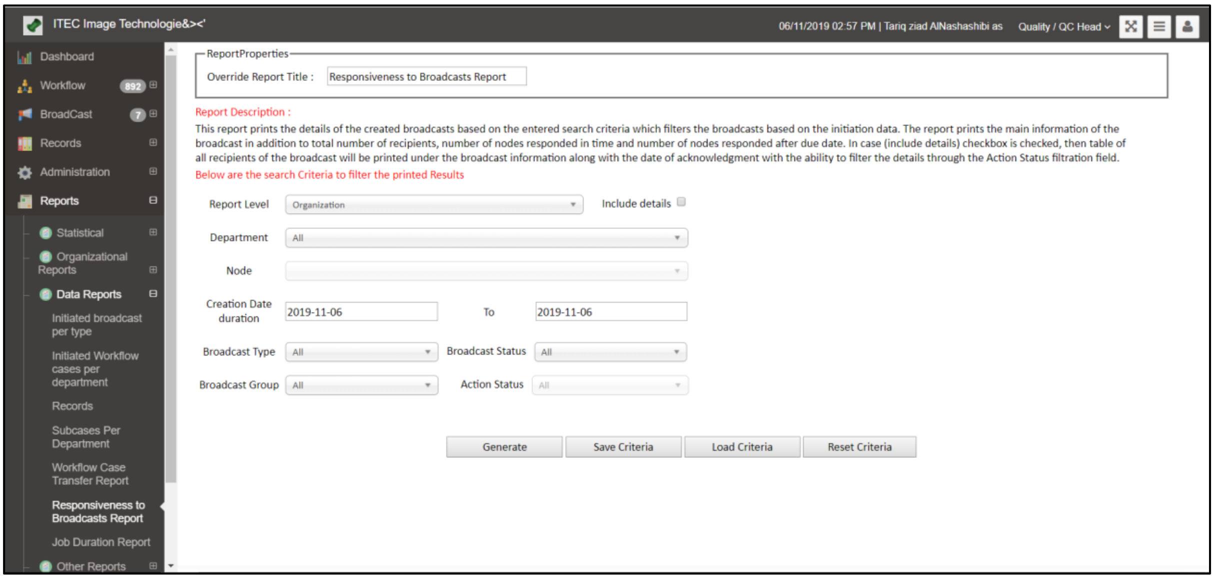
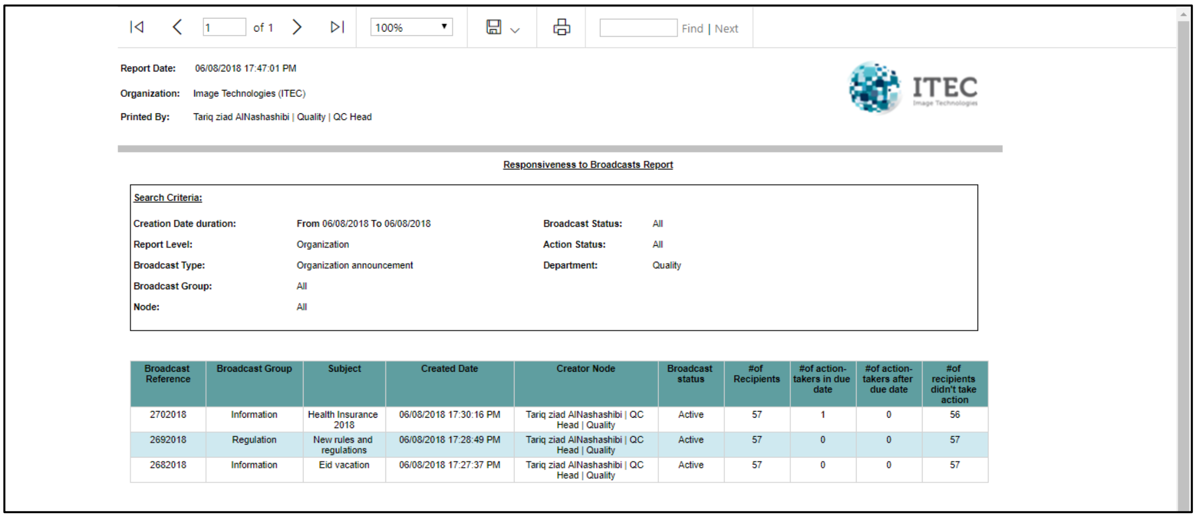


Figure 164: Report – Responsiveness to BC – Search criteria



of 1 | 100% | Find | Next

Report Date: 06/08/2018 17:47:01 PM

Organization: Image Technologies (ITEC)

Printed By: Tariq ziad AlNashashibi | Quality | QC Head

Responsiveness to Broadcasts Report

Search Criteria:

Creation Date duration:	From 06/08/2018 To 06/08/2018	Broadcast Status:	All
Report Level:	Organization	Action Status:	All
Broadcast Type:	Organization announcement	Department:	Quality
Broadcast Group:	All		
Node:	All		

Broadcast Reference	Broadcast Group	Subject	Created Date	Creator Node	Broadcast status	#of Recipients	#of action-takers in due date	#of action-takers after due date	#of recipients didn't take action
2702018	Information	Health Insurance 2018	06/08/2018 17:30:16 PM	Tariq ziad AlNashashibi | QC Head | Quality	Active	57	1	0	56
2692018	Regulation	New rules and regulations	06/08/2018 17:28:49 PM	Tariq ziad AlNashashibi | QC Head | Quality	Active	57	0	0	57
2682018	Information	Eid vacation	06/08/2018 17:27:37 PM	Tariq ziad AlNashashibi | QC Head | Quality	Active	57	0	0	57

Figure 165: Report – Responsiveness to BC – Result criteria

Organization's Data Reports

Through this report, the user will be able to print the defined data in the number of settings pages in the administration module. This page contains a list of the following reports:

1. List of storage libraries.
2. List of follow up cards.
3. List of broadcast types.
4. List of workflow types.
5. List of record types.
6. List of code schemas.
7. List of stamps.
8. List of job functions.
9. List of groups.
10. List of departments.
11. List of users.
12. List of committees.
13. Organization's Structure.

→ The user can select the report name from the report name drop down list and accordingly the related parameters will be displayed. Clicking on the Generate button will generate the related report.

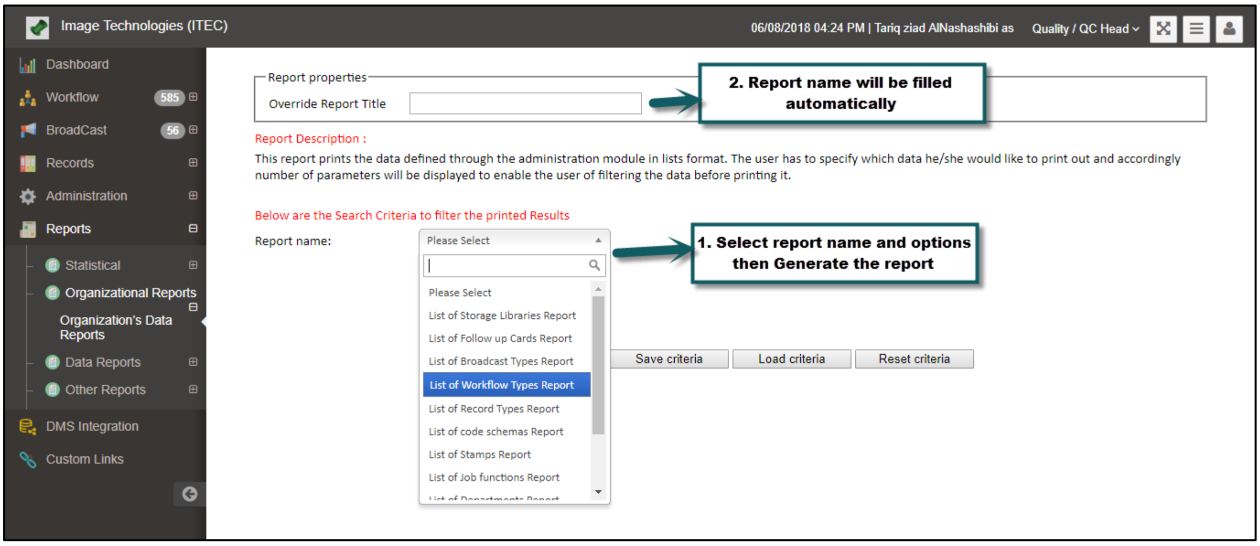


FIGURE 166: REPORT – ORGANIZATION DATA REPORTS – SEARCH CRITERIA