The system of the electronic workflow management "DocumentLite"

The instruction for the user

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Introduction

The system of the electronic workflow "DocumentLite" is intend for the process automation of the document passing to the organizations and gives the users following possibilities:

- registration of documents
- electronic document moving among the staff
- document coordination
- control of the document passing and other tasks and coordinations
- search of documents in the system

In the operation with documents in the system "DocumentLite" the user can execute one or some functions:

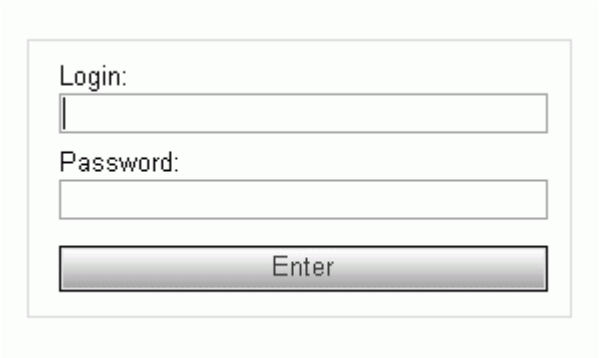
- *the document creator* - the person, who creates a document in the system. He appoints a *document controller* . The creator or another person can be a *document controller* .

- *the document controller* – the person, who controls the working process with the document. He can appoint the document user, change the period of executing, remove the document from the control, return the document for rework, create a sub-document, add files to the document and so on.

- *the document user* – the person, who takes part in the document execution and coordination. Only the controller can add *the document users*. *The document users* can create new documents on the basis of the original document. By the document coordination he decides to approve or to dispose the document.

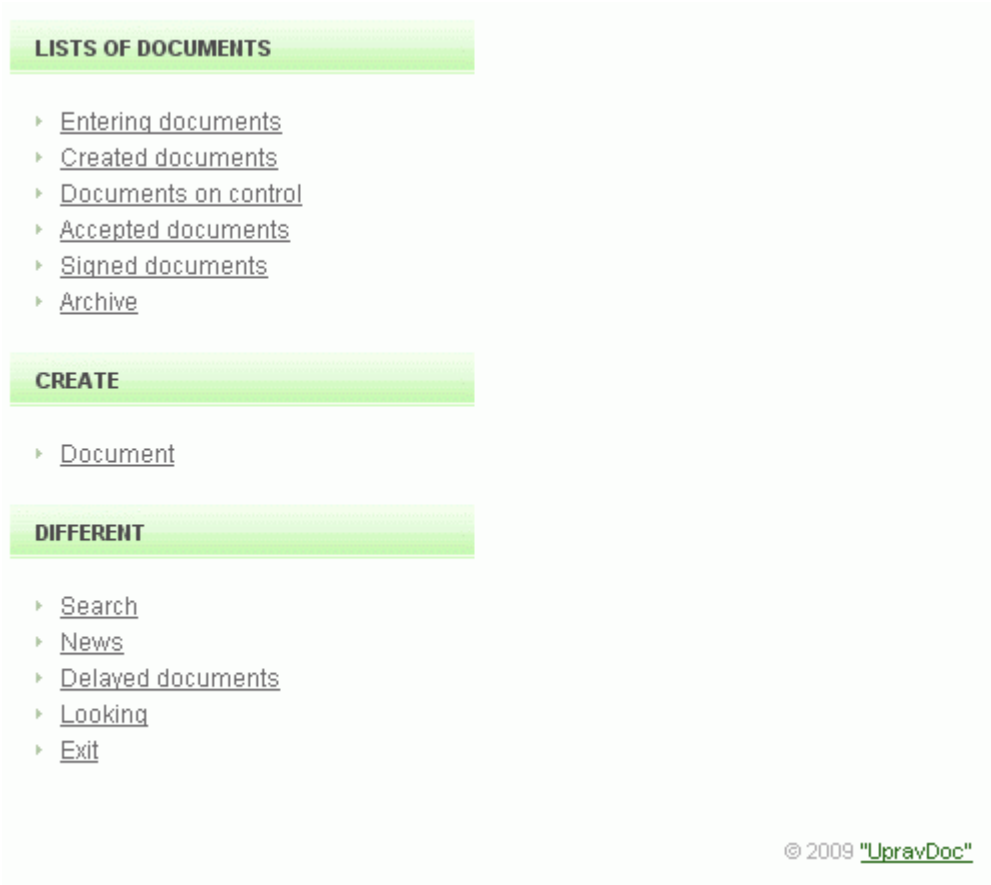
1. Enter the system

To enter the system "DocumentLite" it is necessary to enter a login, a password and to click "Enter".



2. Menu "Lists of documents"

If the login and password are right, there will the window:



In the menu "Lists of documents" there are references to the folders "Entering documents", "Created documents", "Documents on control", "Accepted documents", "Signed documents", "Archive".
Near the folders "Entering documents" and "Documents on control" the quantity of unread documents are specified parenthetically.
Let's consider the structure and functions of these folders.

2.1. Folder "Entering documents"

To enter this folder it is necessary to click its name in the menu "Lists of documents".

This folder is for keeping of entering documents of the user. On these documents the user can decide: to accept them, to sign (if the document was sent to the coordination), or to refuse.

The content of the folder is displayed in tabular form with the lists of all entering documents of the user. In the first column there is the name of document. In each column the sorting is carried out. It is made by clicking down or up in the name of document. The document can be opened and sawn, clicking the name of document. The new or unopened documents are bold.

2.2. Folder "Created documents"

In this folder the created documents are kept (except the documents that were sent to the "Archive"). After clicking the name of the folder, on the screen will be its content.

The content of the folder is displayed in tabular with the sortable columns. The document opening is carried out in the folder "Entering documents". The new or unopened documents are bold.

2.3. Folder "Documents on control"

To enter this folder it is necessary to click its name in the menu "Lists of documents".

The folder is for keeping of documents, where the system user is a controller. The content of the folder is displayed in tabular with the sortable columns. The document can be opened and sawn, clicking its name.

2.4. Folder "Accepted documents"

To enter this folder it is necessary to click its name in the menu "Lists of documents"

In this folder there are documents that the user works with. The content of the folder is displayed in tabular with the sortable columns. The document can be opened and sawn, clicking its name.

2.5. Folder "Signed documents"

To enter this folder it is necessary to click its name in the menu "Lists of documents".

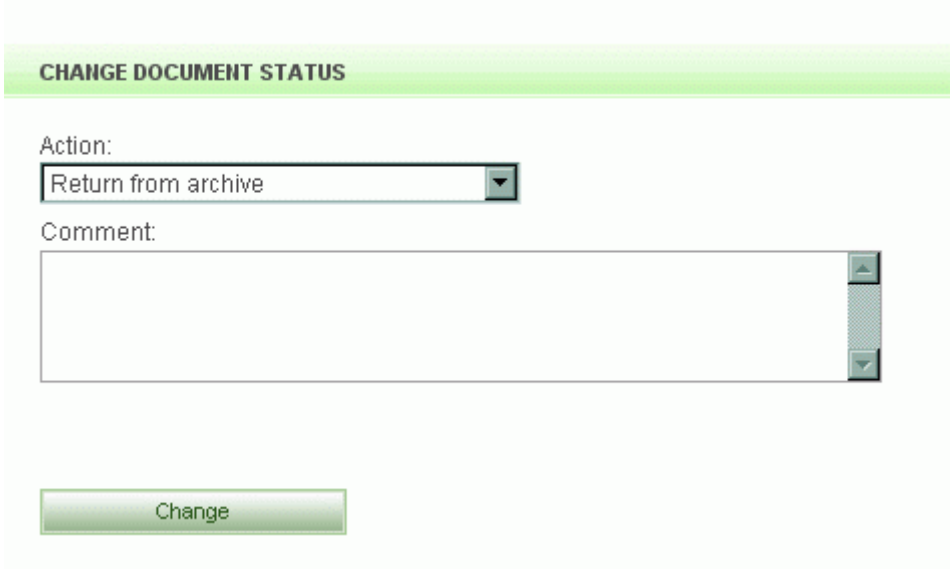
In the folder there are documents of the user, work with that is ended, or the signed documents, if the document was in the coordination.

2.6. Folder "Archive"

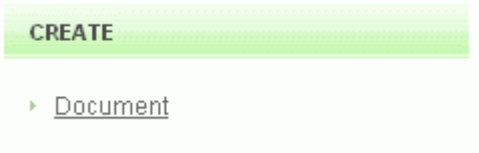
To enter this folder it is necessary to click its name in the menu "Lists of documents".

In this folder there are documents from the folder "Documents on control", that helped the user to decide, that the work with them was made. The content of the folder is displayed in tabular with the sortable columns. The document can be opened and sawn, clicking its name. If it is necessary, the user can return a document

from "Archive". For that it is necessary to open it, to choose in "Change document status" the action "Return from archive" and to click "Change".



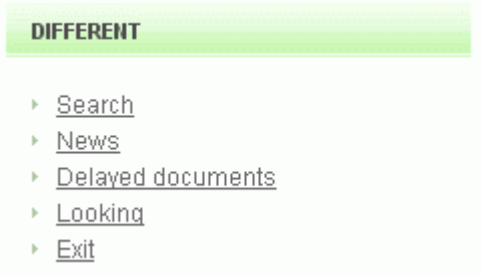
3. Menu "Create"



3.1. Document

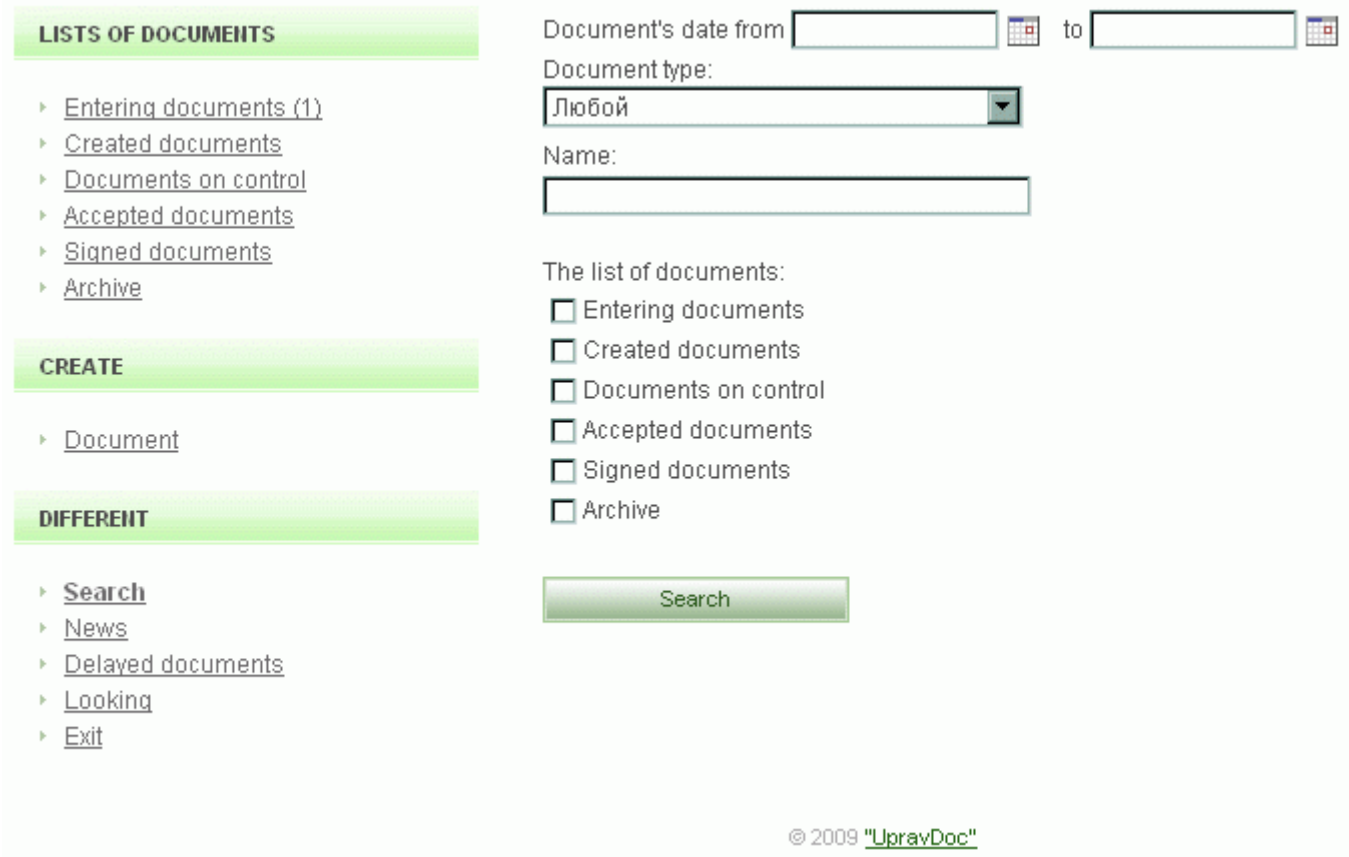
The folder "Document" is used for the creation of new documents: service notes, orders, instruction etc. About the rules of document creation - the paragraph 5.1. "Creation of document".

4. Menu "Different"



4.1. Search

The search is carried out by clicking "Search" und in content of the folder of the system user. After clicking the following window appears:



The search can be carried out in any box.
It is obligatory to point the folder, where the search will be carried out. The user can point some folders.
The name of document can be pointed incompletely. For example, to find the document "E-mail settings" it is necessary to type "Setting". After that there will be a list of documents that have this word.
In the search it is important, if the word is typed with capital or small letters. If the word "selling" is typed in the field "Name", the document with the word "Selling" will be not found.

4.2. News

In this paragraph the actions are displayed, that were made with documents last time.

In the column "Date" there is the date, when the action was made. For example, when the document was signed, or when the system user was added in "Discussion" etc. To enter the document it is necessary to click its name in the column "Additional information".
The news can be sent to e-mail, if the admin of the system "DocumentLite" makes some settings of the user.

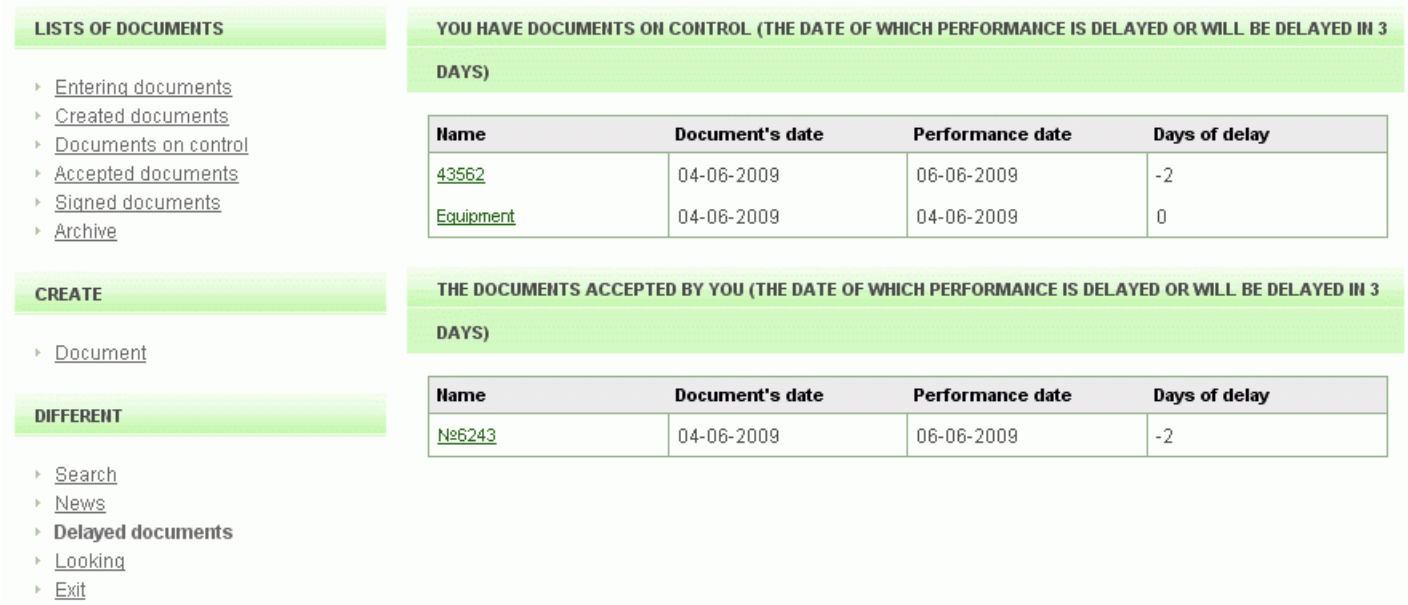
For example, the controller Kuznetsov Sergej Petrovich appointed the user of document Smirnov Andrej Ivanovich. Smirnov Andrej Ivanovich gets an e-mail letter "You were appointed a user of document".
The letter will be so:

Good morning, Smirnov Andrej Ivanovich
You were appointed a user of document.
Document: equipment
Comment: to coordination.

Clicking the name of document in the letter, it is necessary to enter the document in the system "DocumentLite".

4.3. Delayed documents

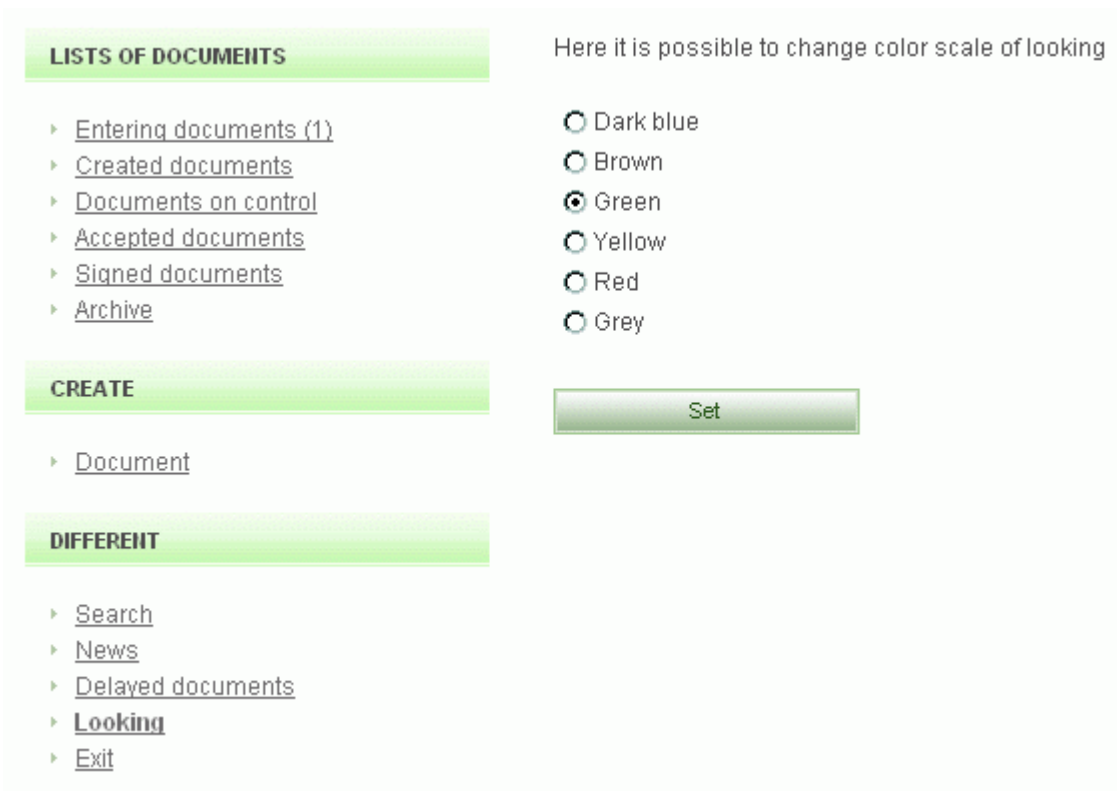
In this paragraph there is a list of documents, due date that will be delayed in 3 days.



The list consists from 2 tabulations. In the first one there are documents that are in the folder "Documents on control", in the second one - in the folder "Accepted documents".
In the column "Days of delay" is the quantity of overdue days (if it is a positive number) or the quantity of days until due date (if it is a negative number).

4.4. Looking

The user can change the color of looking of the system "DocumentLite" in PC:



It is enough to put a point near the needed color and to click "Set".

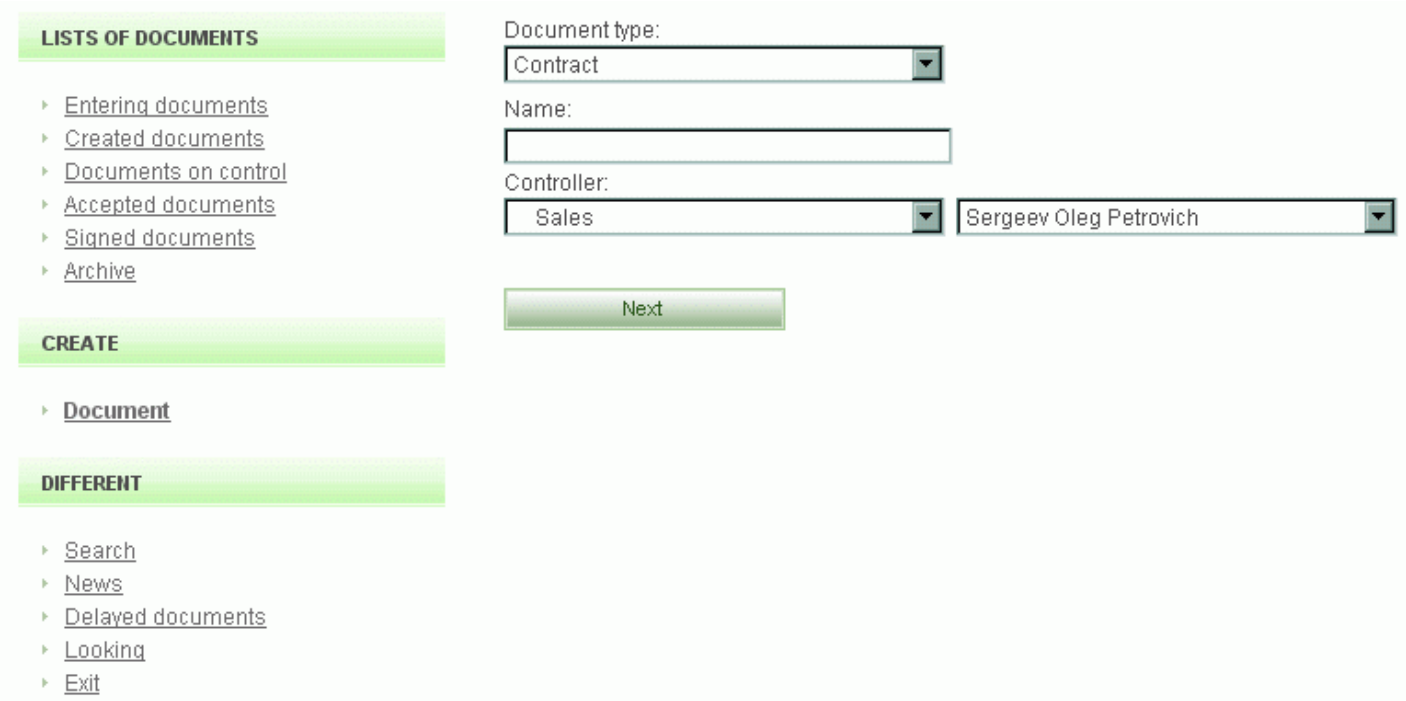
4.5 Exit

Clicking this paragraph the user exits from the system "DocumentLite".

5. Work with documents in the system "DocumentLite"

5.1. Creation of document

To create a document it is necessary to click "Document" in the menu "Create".



In the form that appeared it is necessary to fill fields:

- *"Document type"*

The type of document is chosen: service note, order etc.

- *"Name"*

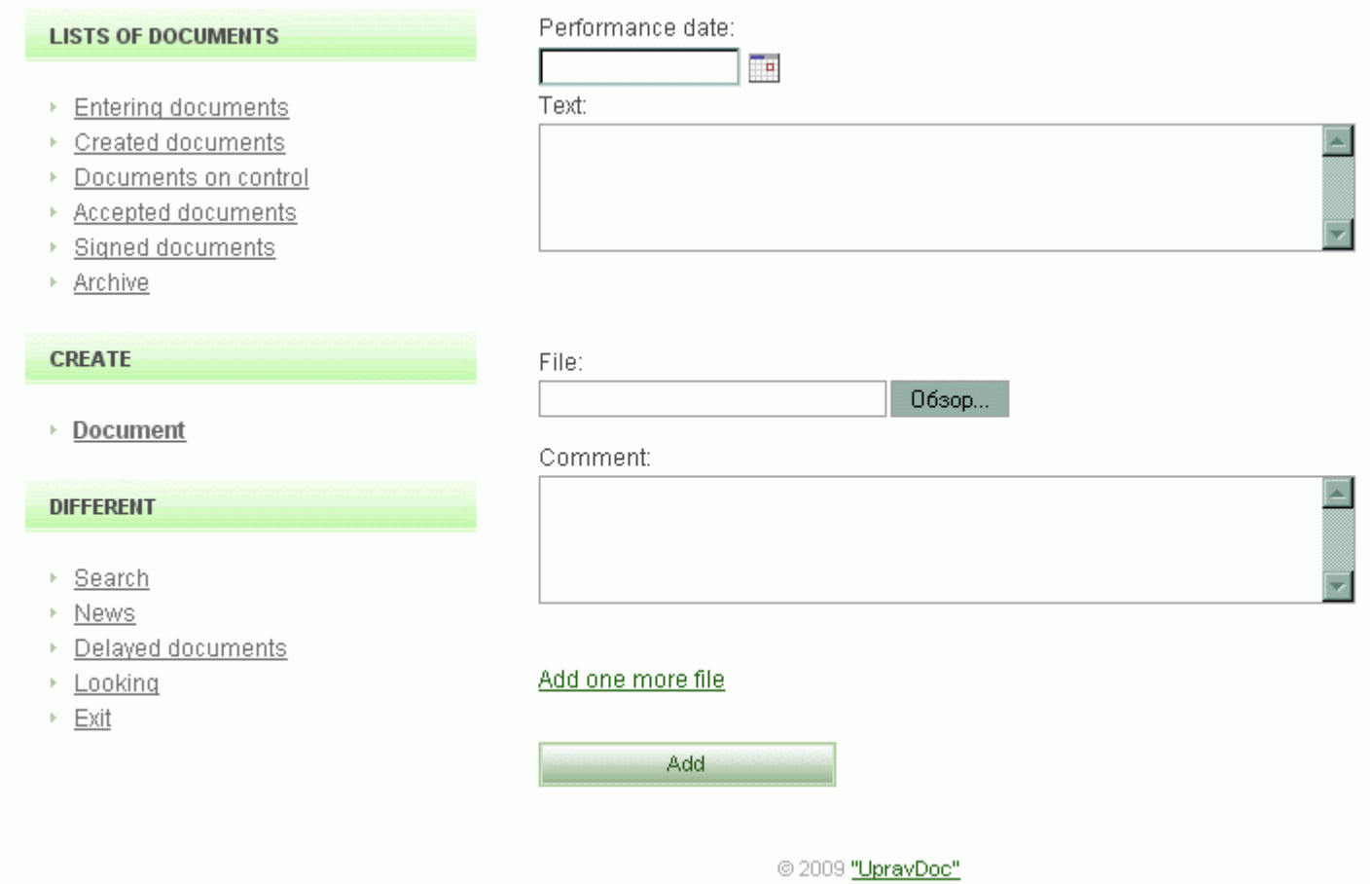
The name of document can display in 2 - 3 words the meaning of document. You shouldn't type there "Service note" or "Order", because they are in "Document type ". You have to type a meaningful name that allows to mark this document in the entering messages. For example, the name "About the equipment buying" is more informative than the name "Service note in the equipment buying".

- *"Controller"*

In this field it is necessary to choose a department or an employee that will control the process of document executing. The choice of the controller is carried out by appointment of document.

When all windows are filled, it is necessary to click "Next".

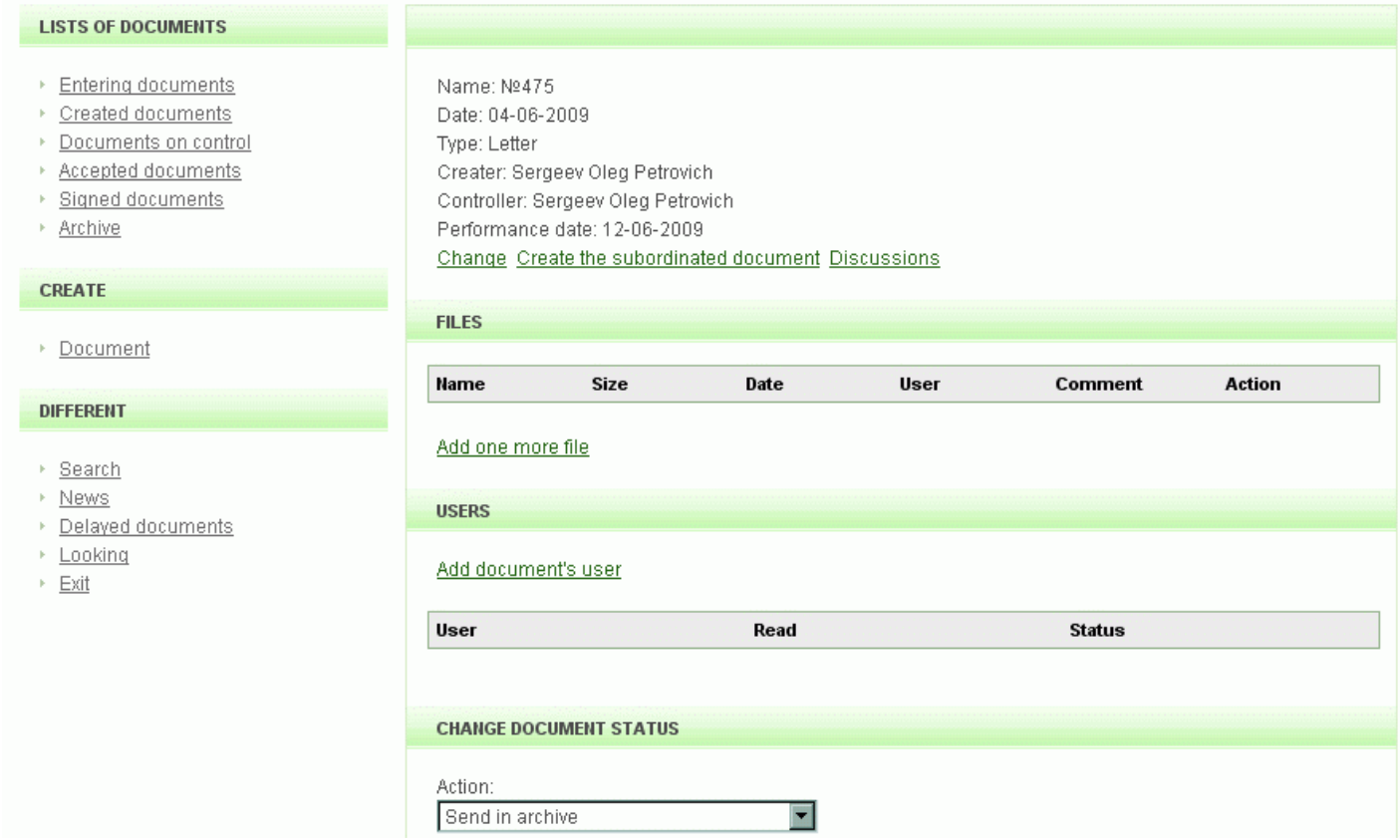
The following form will appear for filling of other fields of document.



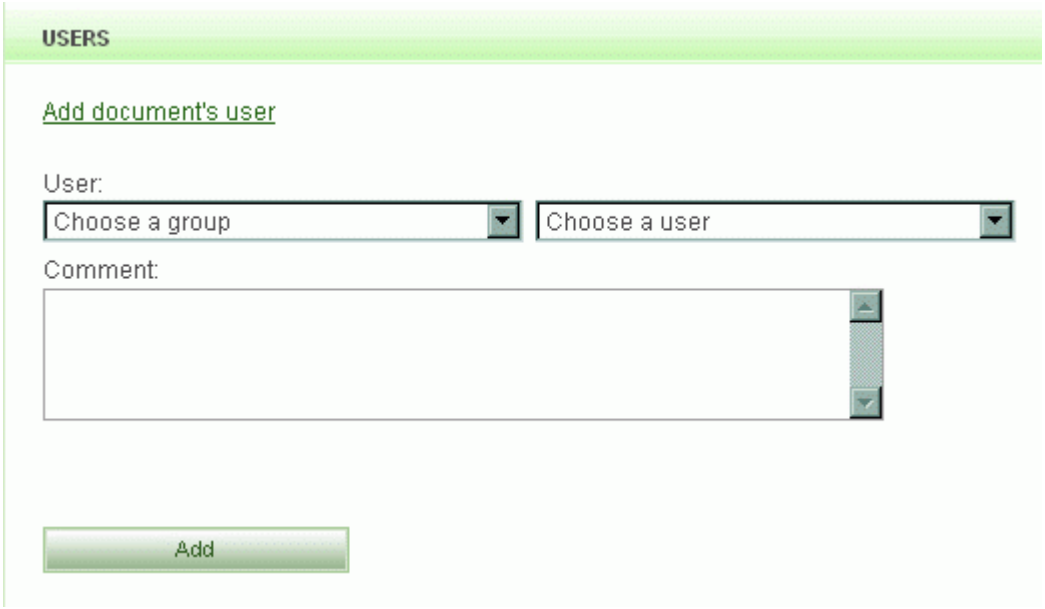
The fields can be different for different types of documents. It can be comments for the controller of document or for the user, due dates etc. The text of document is typed in the field of document description or can be added in the file form. For that there is the field "File". To add a file it is necessary to click "Browse" and to choose a file for addition. If there are a lot of files, you have to click "Add one more file". There will be a new field for document addition. When all fields are filled, it is necessary to click "Add". After that the document will appear in the folder "Created documents" by the creator and in the folder "Documents on control" by the controller. If the creator and the controller are the same, the user will get the document in both folders.

5.2. Work with documents in "Documents on control"

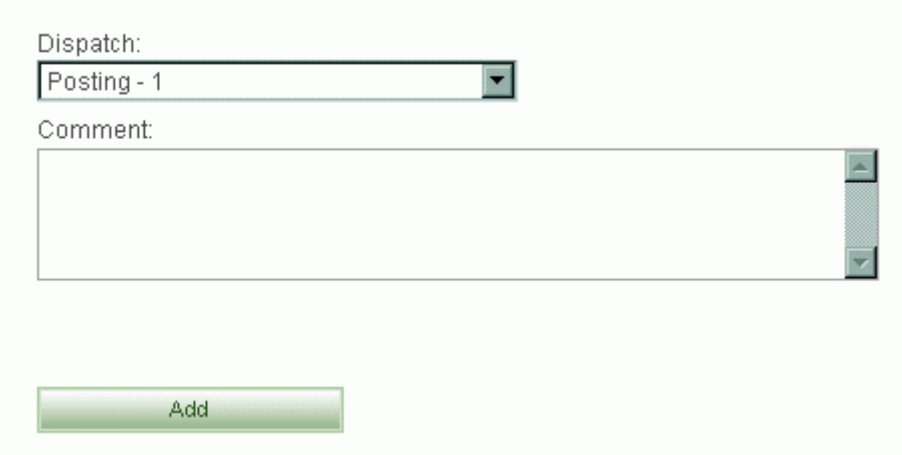
To appoint a document user it is necessary to open the document in the folder "Documents on control". The following window will appear:



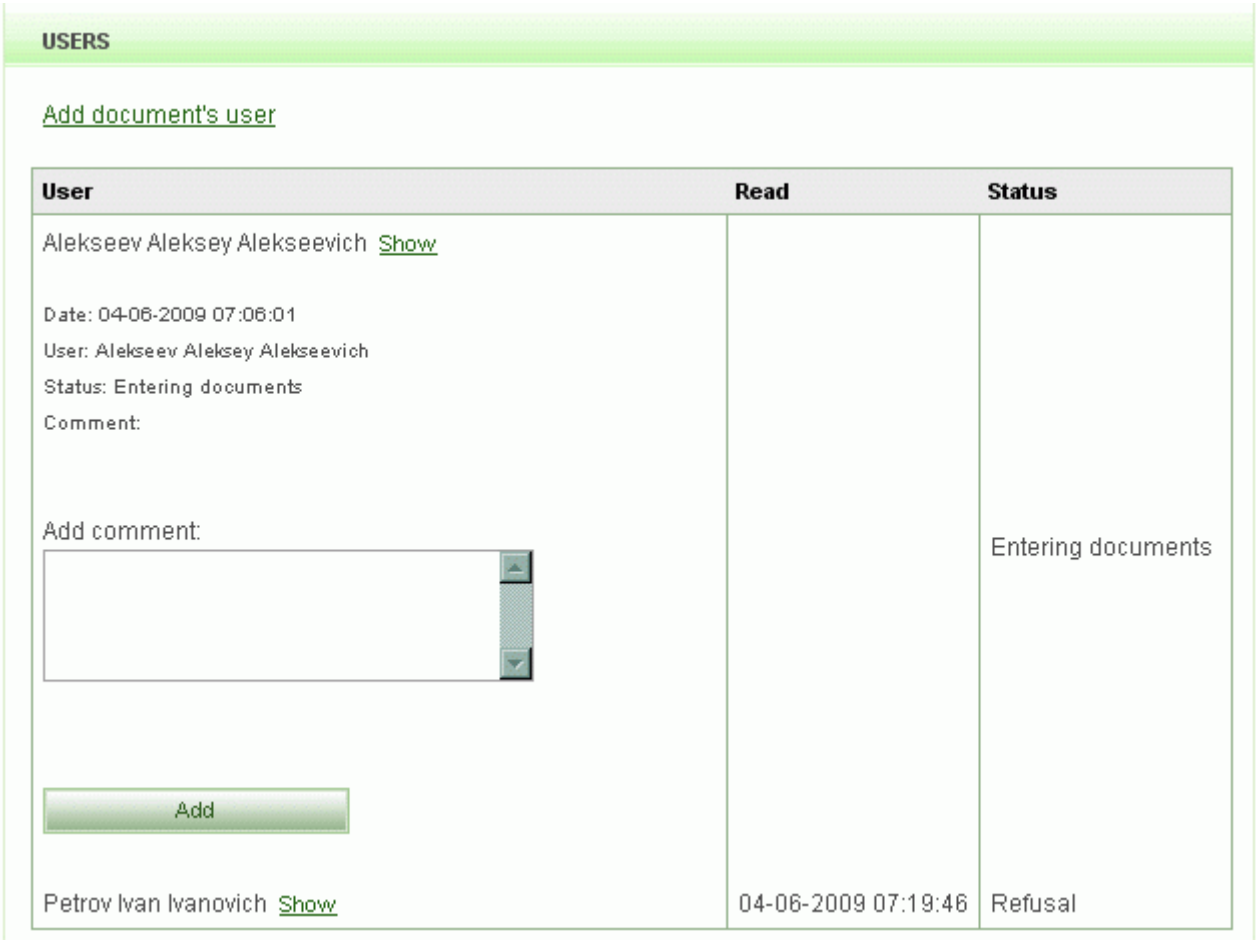
In the opened window you can add new files or remove the earlier added files.
The person, that the document will be sent to, is appointed in the paragraph "Users".
To appoint the user it is necessary to click "Add document's user". Then to choose the group, the user, if needed, to type a comment and to click "Add".



After that the document will be sent to the document user. He will get an e-mail message, that he was appointed the document user.



For that it is necessary in the "Message" to click the needed message and to type a comment and to click "Add".
In the folder "Documents on control" the controller can consider the needed documents, controlling the stage of due. In the list of user you can see the document status.

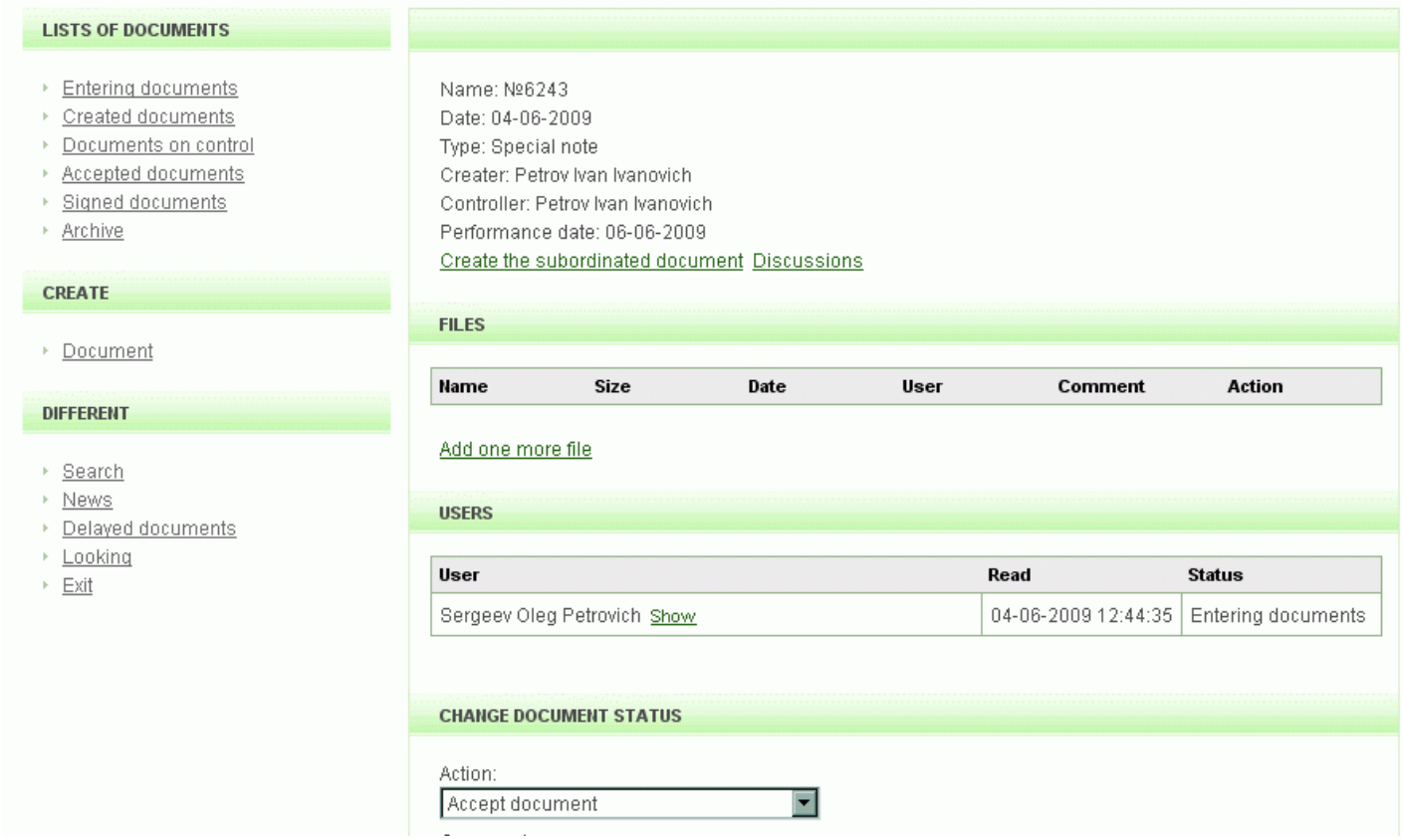


In this tabulation there are the names of users, dates, when the user opened the document first time, and status (entering, accepted, signed). Near the names there is "Show". After clicking it you can see the history of status changes and the comments. The controller can see all history of status changes and comments of any document user. The user can see only his own history of status.
The controller can add a document to the user in the list of documents "Entering" once again. For that he has to add the user once again.
The controller can send a developed or non-topical document to "Archive" (if needed he can add a comment).

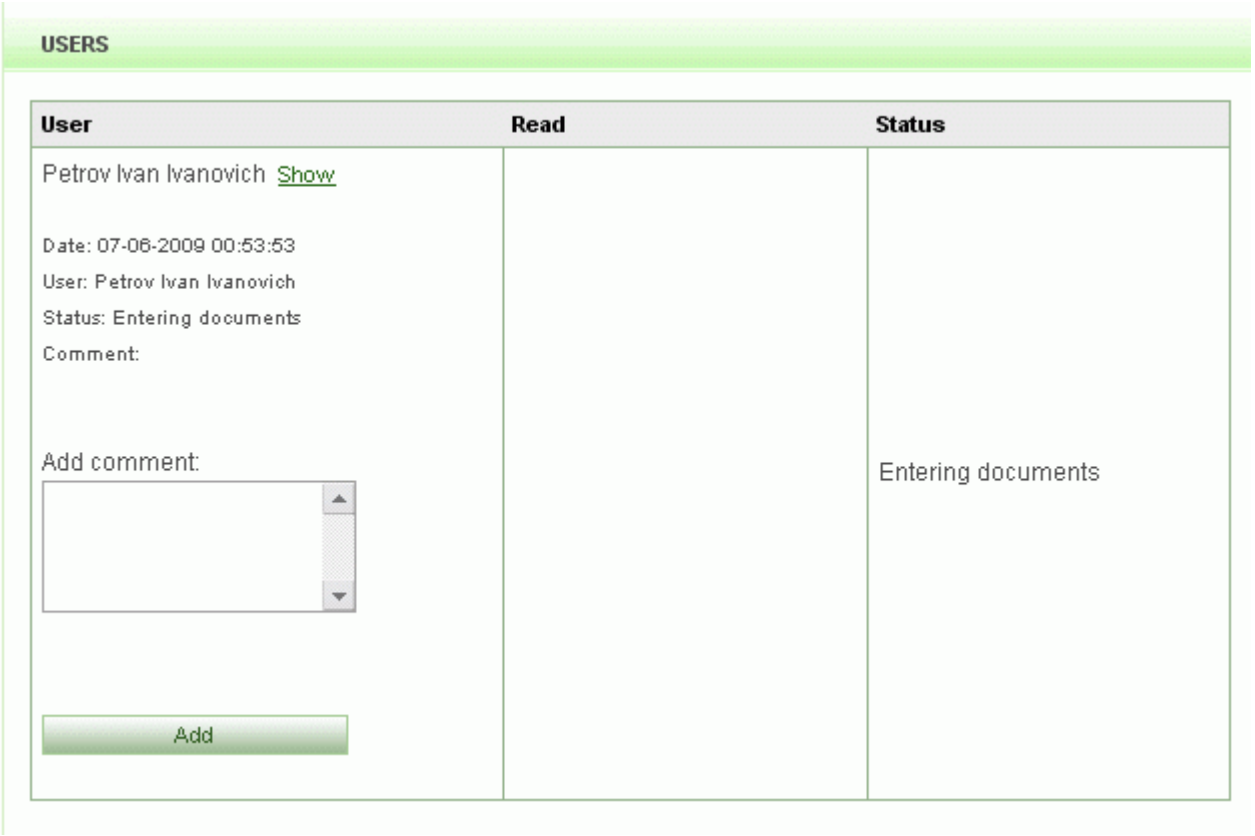
After sending to "Archive" the document disappears in the folder "Created documents" of the document creator, and in the folders "Entering documents" and "Accepted documents" of the document user.

5.3 Work with documents in the folder "Entering document"

After appointing a document user, the document appears in his folder "Entering documents". Besides the user gets an e-mail message about it. The user opens the document:

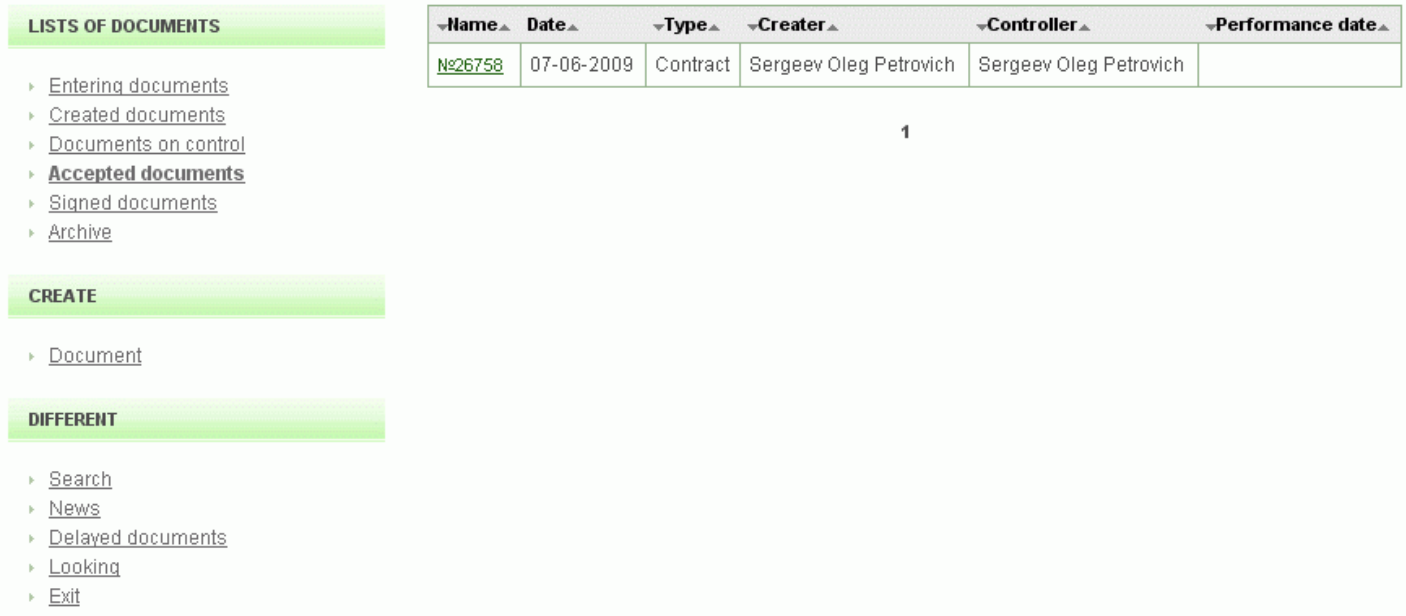


In the window the user can consider the content of document, open the subordinated files. Clicking "Show" near the name the user can see comments of controller for him.



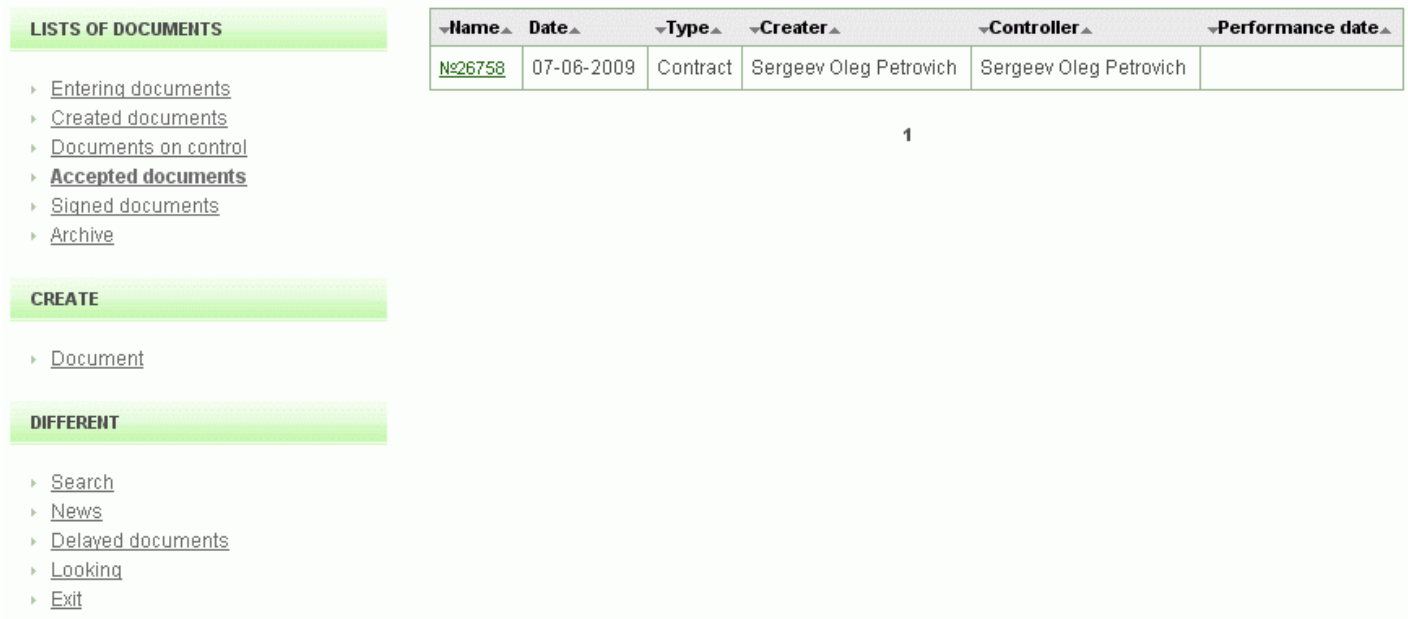
After considering the needed information the user decides: to accept the document to the work (choose the status "Accept document", if needed type the comment) or to refuse it (choose the status "Refuse", if needed type the comment with argumentation), und click the button "Change".

After accepting of document the user goes to the folder "Accepted documents".

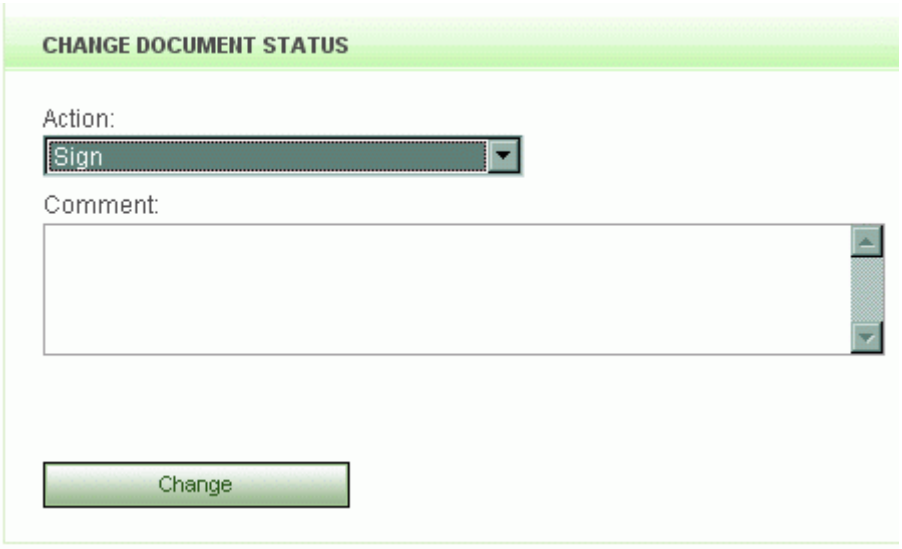


5.4. Work with documents in the folder "Accepted documents"

After opening of the document there will be a window:



Depending on the results of work with documents the user can inform of its performance (choosing the action "Sign", writing the comment for the controller and clicking the button "Change") or withdraw from the document (choosing the action "Withdraw from the document", writing the comment with the argumentation and clicking the button "Change").

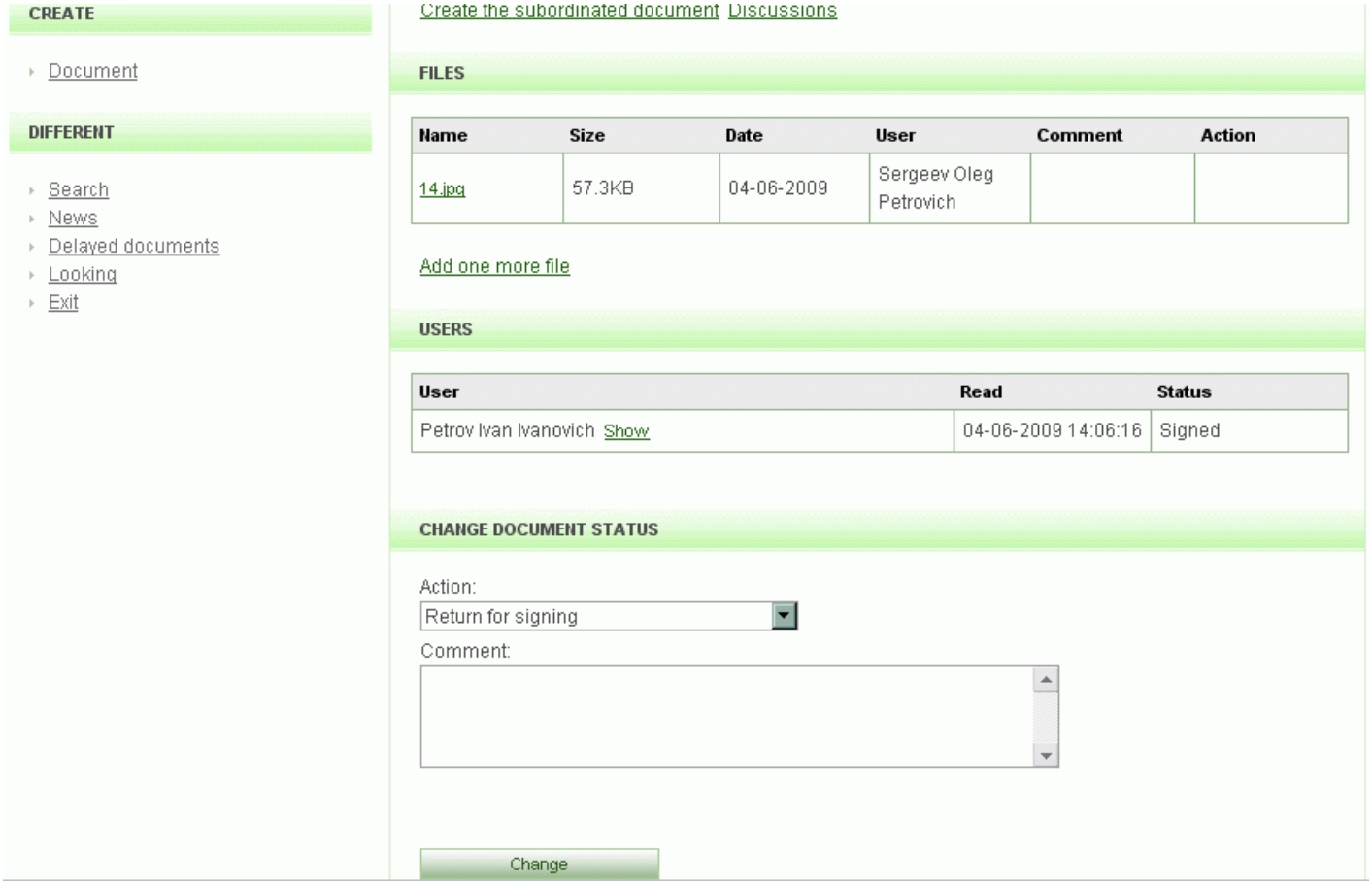


If the document is signed, it goes from the folder "Accepted documents" to the folder "Signed documents".

5.5. Work with documents in the folder "Signed documents"

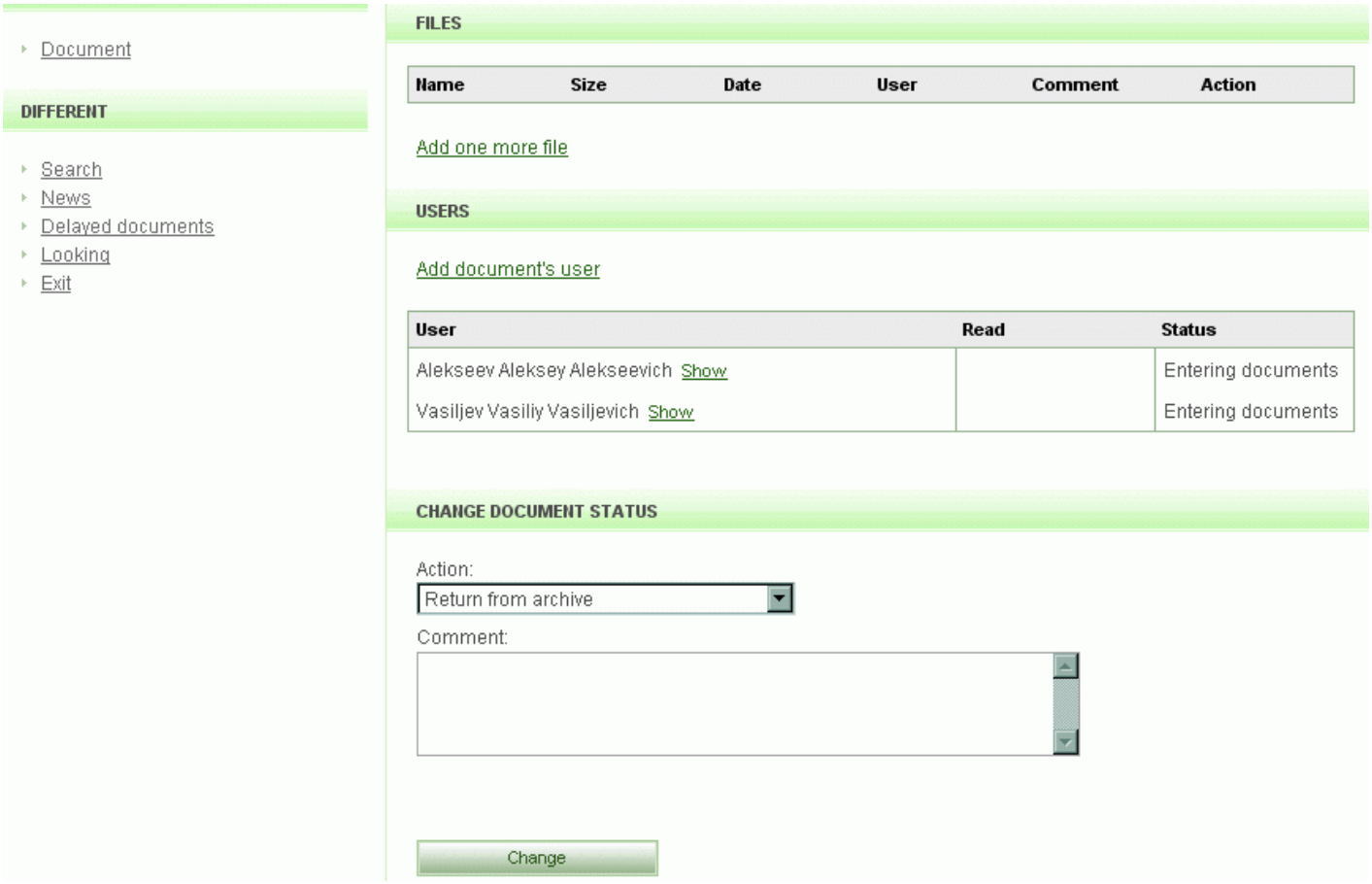
After opening of the document there will be a window:

The document from this folder can be returned to the work, opening it and choosing the action "Return for signing".



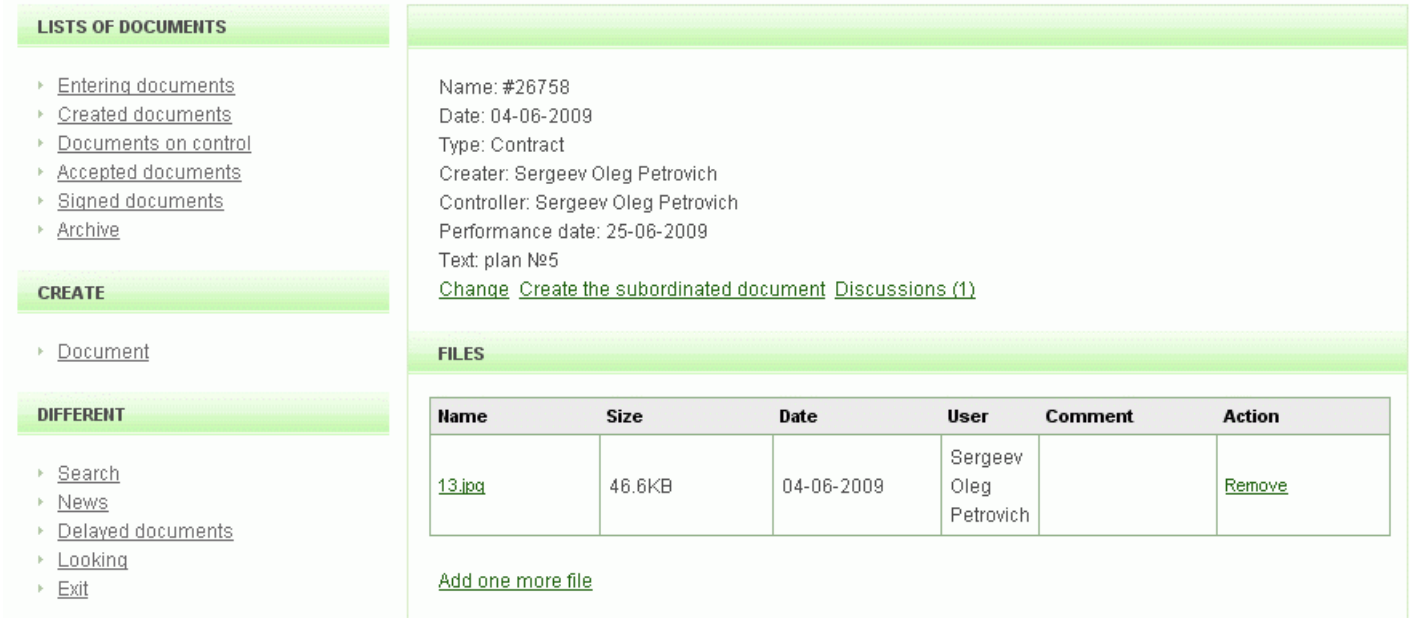
5.6. Work with documents in the folder "Archive"

The controller sends the developed documents to the archive.
If it is necessary, the document can be returned to the work, after choosing of the action "Return from archive".



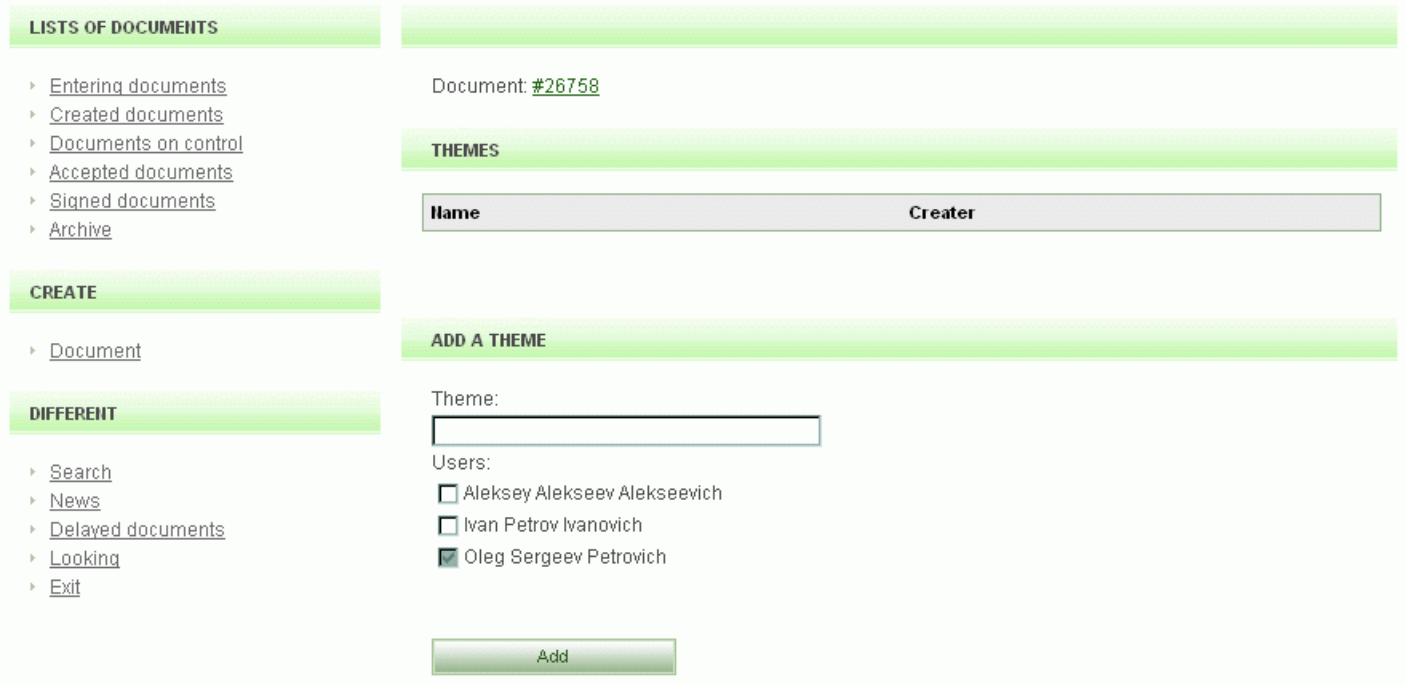
The document will appear in the folder "Created documents" of the document creator, in the folder "Documents on control" of the document controller, in the folders "Entering documents" and "Accepted documents" of the document user. The next work with the document is carried out in the usual way.

6. Operation order in the paragraph "Discussions"

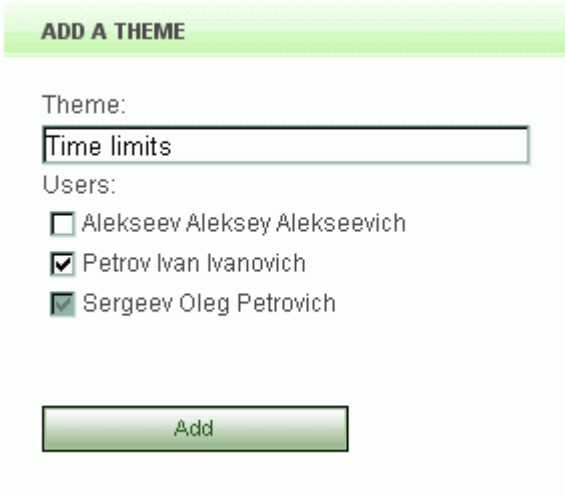


The paragraph "Discussions" is to conduct a dialogue between the system users that take part in this document. The dialogue can be conducted between any members of this document: between the user and

controller, between the users, or between the creator und the user etc.
You can organize a dialogue in the document that is in any folders ("Entering documents ", "Documents on control", "Created documents").
Clicking the button "Discussions" there will the following window:

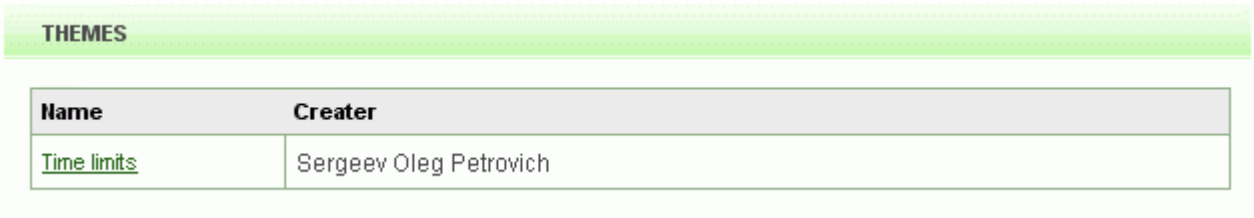


To organize a dialogue with a member of document or a group of members it is necessary to type in the field "Theme" the title of the theme, then to tick the system users that you want to talk to and to click the button "Add".

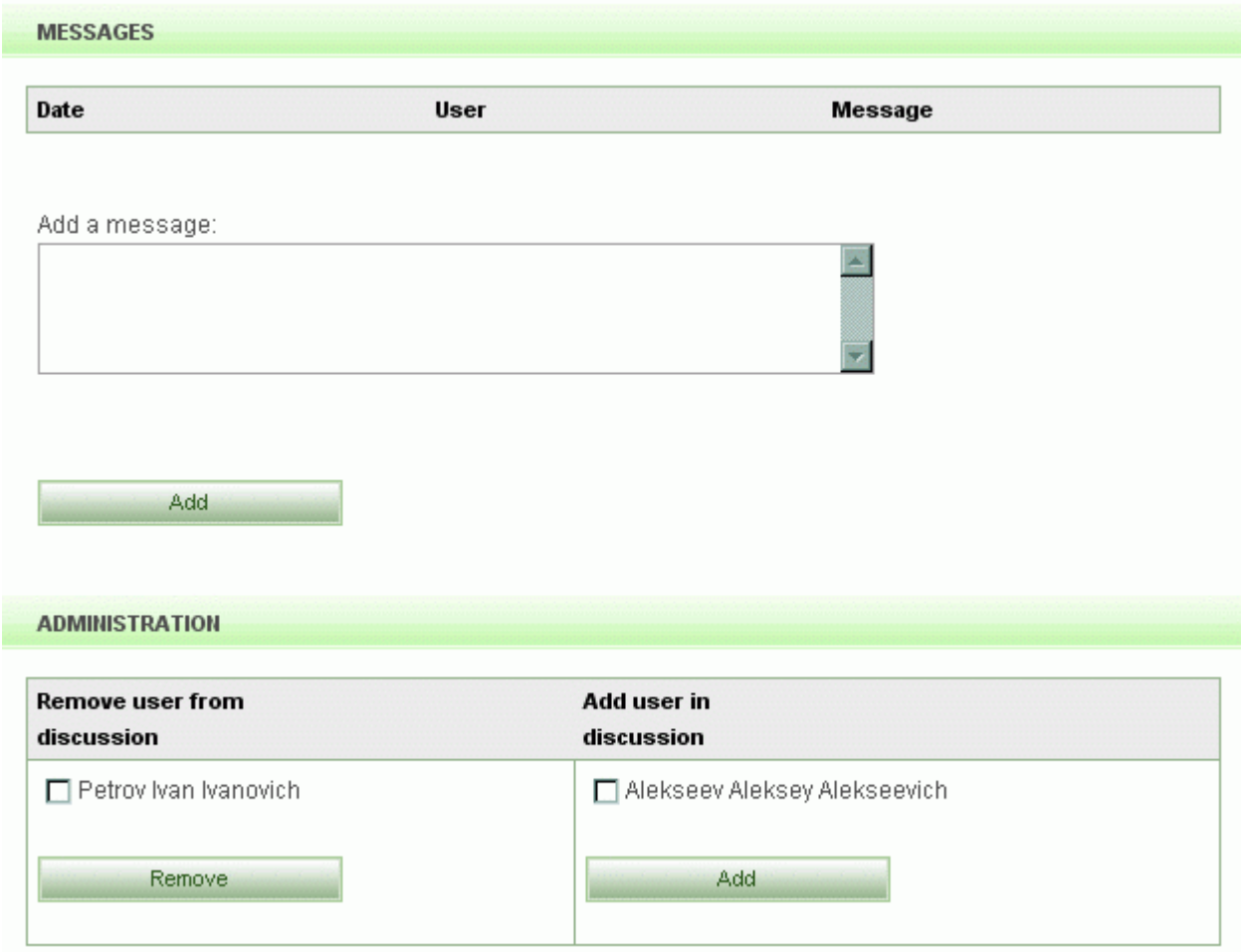


The theme can be created many times. It is recommended to use the short and understandable title of theme - "Change of plan", "Question to the paragraph 2 of the contract", it allows orientating in the discussion of document easily.

After the creation of topic all members of discussion gets an e-mail letter with the title "You were added to the discussion". In the letter there are the topic of discussion and the reference to the discussion.
To enter the discussion of theme it is necessary to click its title in "Themes".



In the field "Add a message" you have to type a question that you want to ask the system users - members of the discussion, or offers - points that you want to discuss. After typing the text it is necessary to click the button "Add".



In this site the members of the discussion can be added or removed.
After clicking of the button "Add" all members get an e-mail letter with the topic "New topic in the discussion". In the letter there are the topic of discussion and the reference to the discussion.
A member that got this letter enters the reference and types in the filed "Add a message" his comment. After clicking of the button "Add" all users will get the e-mail notices that a new message was added.
The created topic can't be removed, it is possible to exclude all users from the discussion - only creator can see this topic.

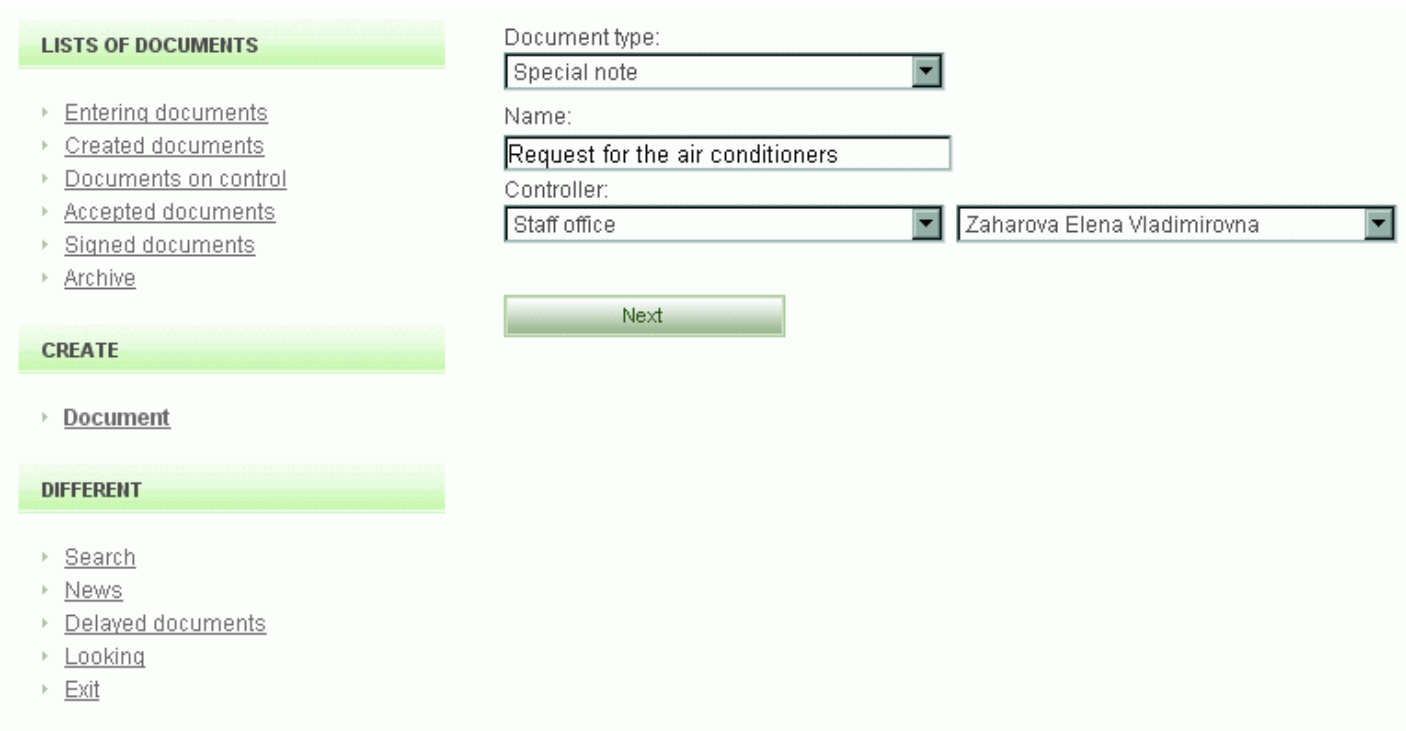
7. Ilustration of the work with documents in "DocumentLite"

Let's consider the example.

The staff office of Zaharova E.V. needs to make request to the supply department for buying of air conditioners. For that she writes a service note to Mr. Frolov N.N., a chief of the supply department. He sends this document to his deputy Skvortsov S.V. Then it will be shown, how this situation looks like in the system "DocumentLite".

The form process and the request executing are carried out in some stages.

1. the chief of the staff office Zaharova E.V. sends a service note to Mr. Frolov N.N., a chief of the supply department. To do it, she enters the system "DocumentLite" and clicks "Document".

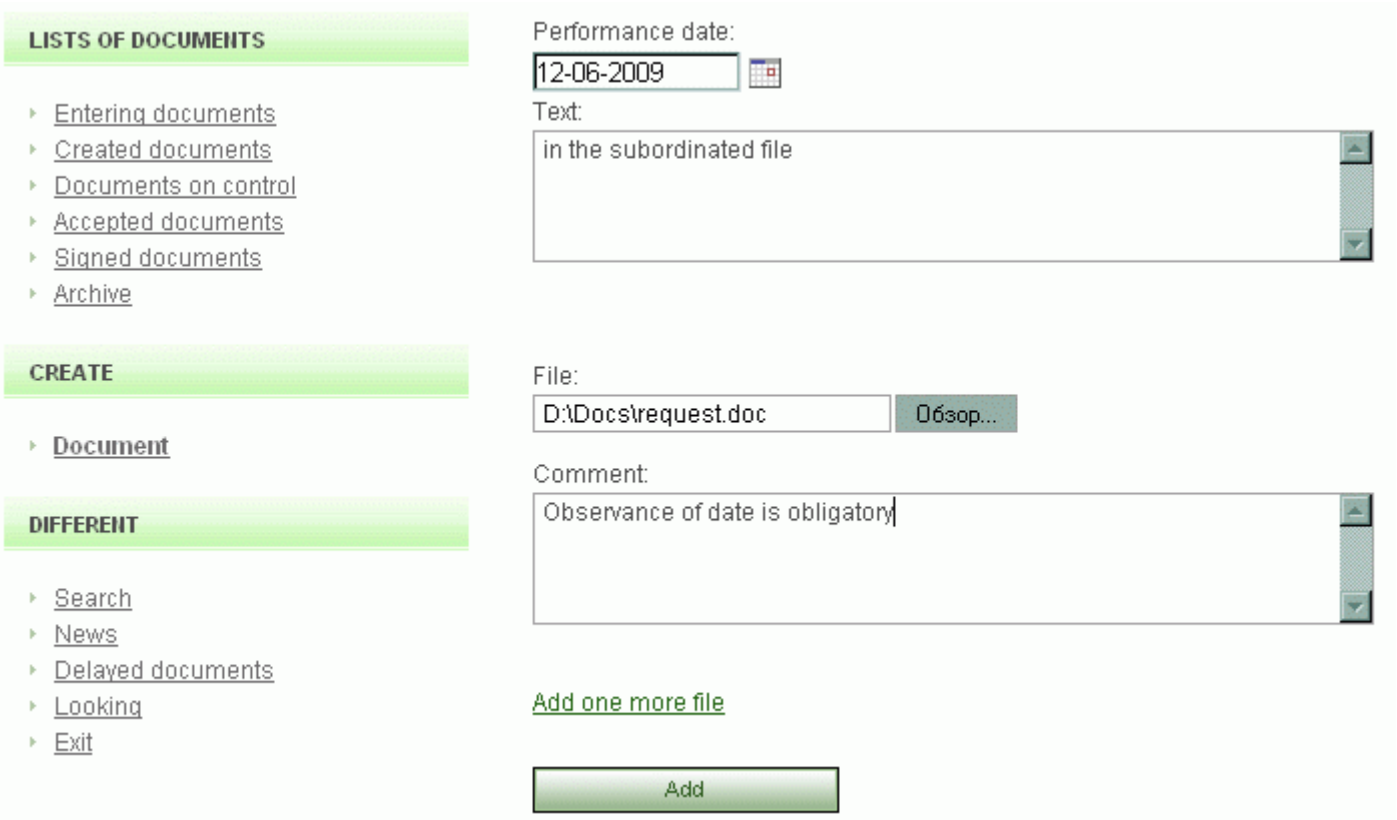


In the field "Document type" she chooses the "Special note".

In the field "Name" she types "Request for the air conditioners".

In the field "Controller" she chooses "the staff office" "Zaharova E.V.", it means she becomes a controller to control of the process of the request executing.

She clicks the button "Next" and gets a new window:



The list of fields can be different; it depends on the fields that the admin of the system "DocumentLite" have brought. The following fields are filled:

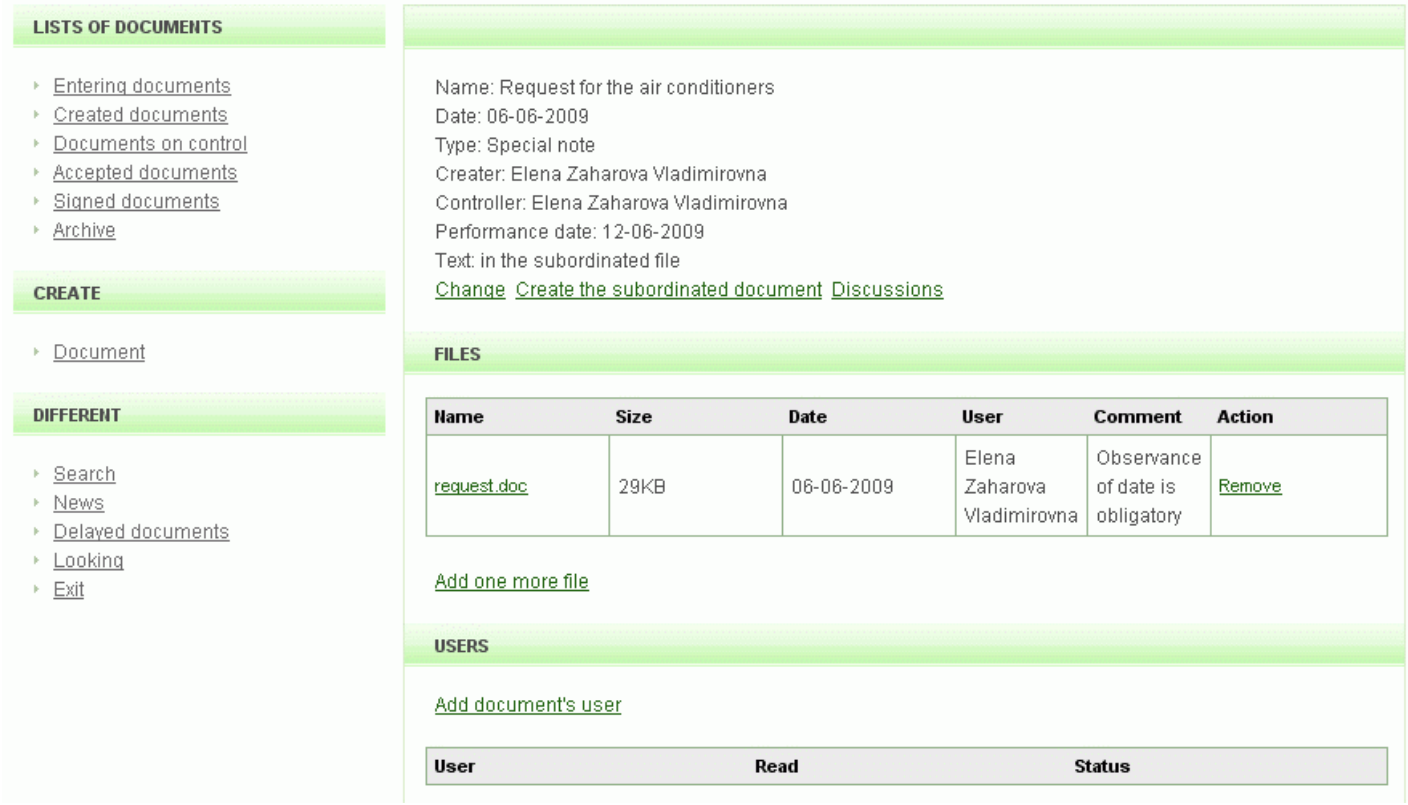
Performance date. It is a date during that the document is made by the user.

Comment . It can't be filled, because the creator and the controller is the same person.

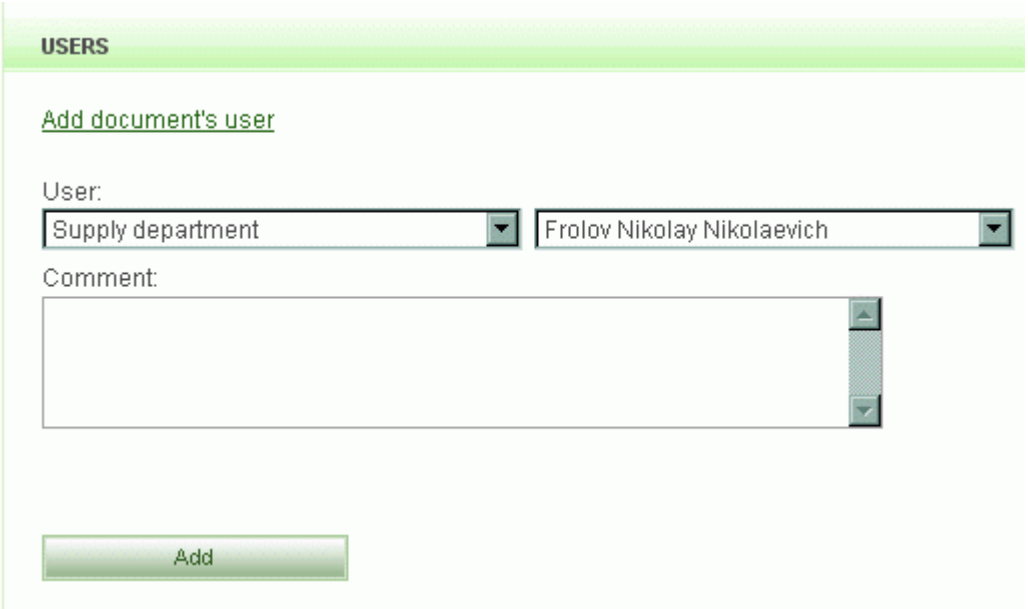
File. The request for the air conditioners was filled in the file form with the quantity of air conditioners, the brand etc. Zaharova E.V. adds this file to the created file, clicking the button "Browse" and choosing the needed file.

After filling of all fields she clicks "Add".

The document in "DocumentLite" was created.

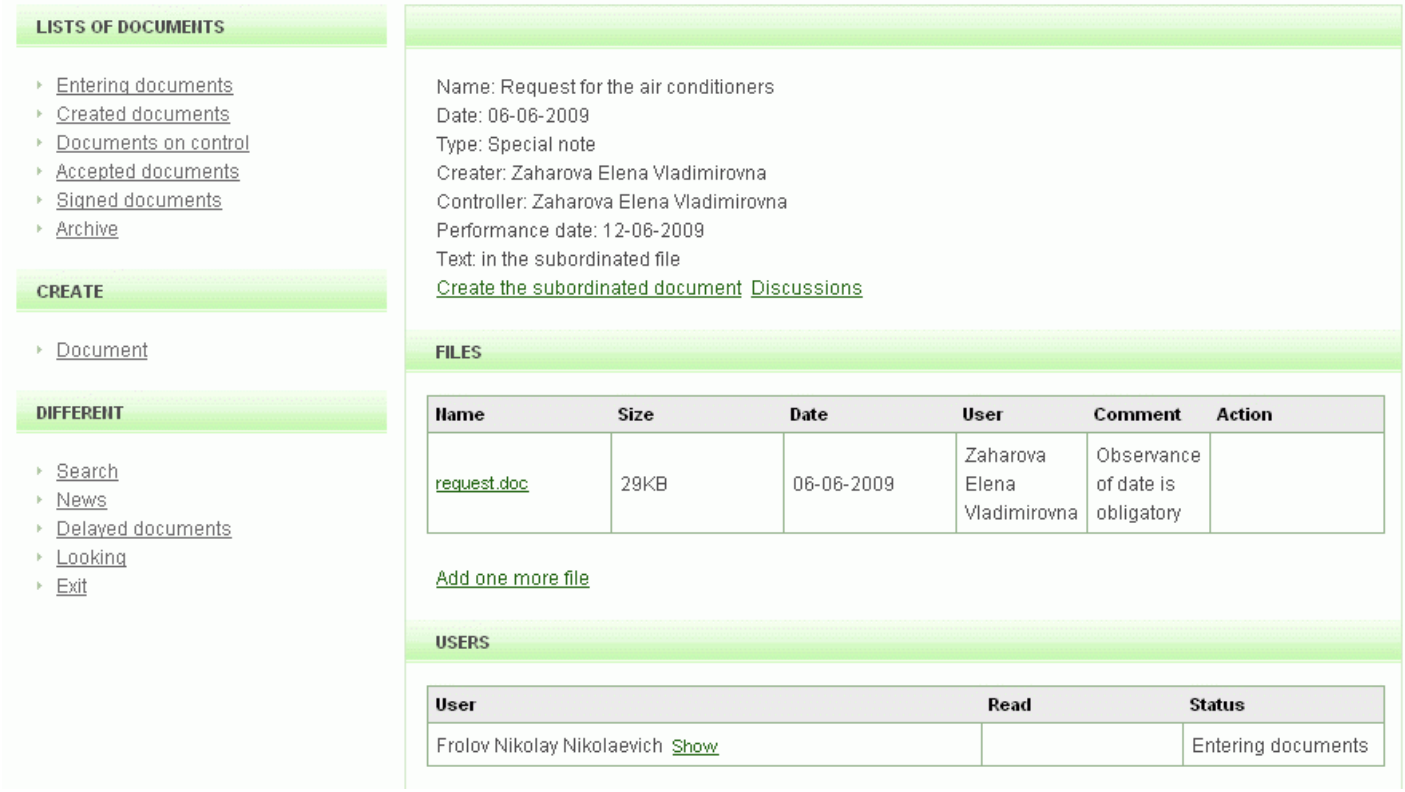


Zaharova E.V. keeps this document in the folders "Created documents" and "Documentson control". Now she needs to send this document to Mr. Frolov N.N., a chief of the supply department. To do it she opens the folder "Documents on control", finds in the list of documents the document "Request for the air conditioners" and enters it, clicking its name. There she finds the reference "Add document's user" and chooses the user: "the supply department" "Frolov N.N.", then clicks "Add".

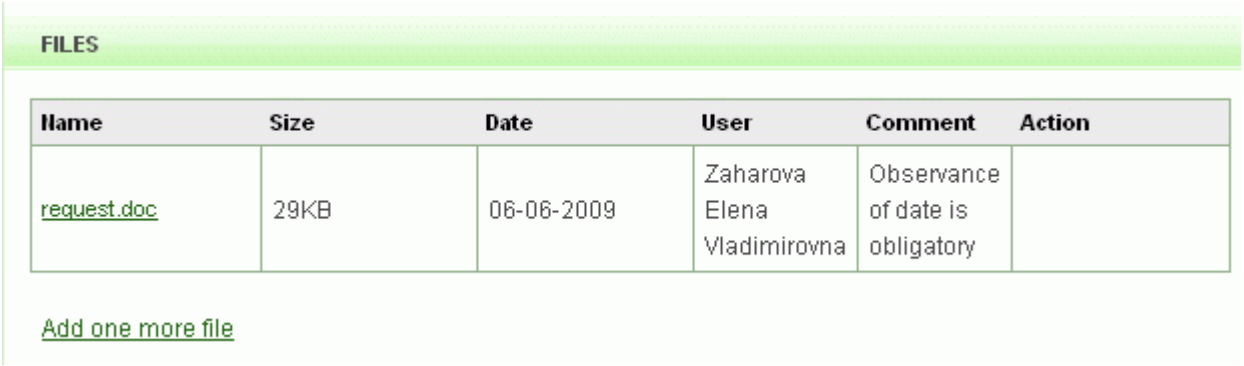


After that the document appears in the folder "Entering documents" of Frolov.

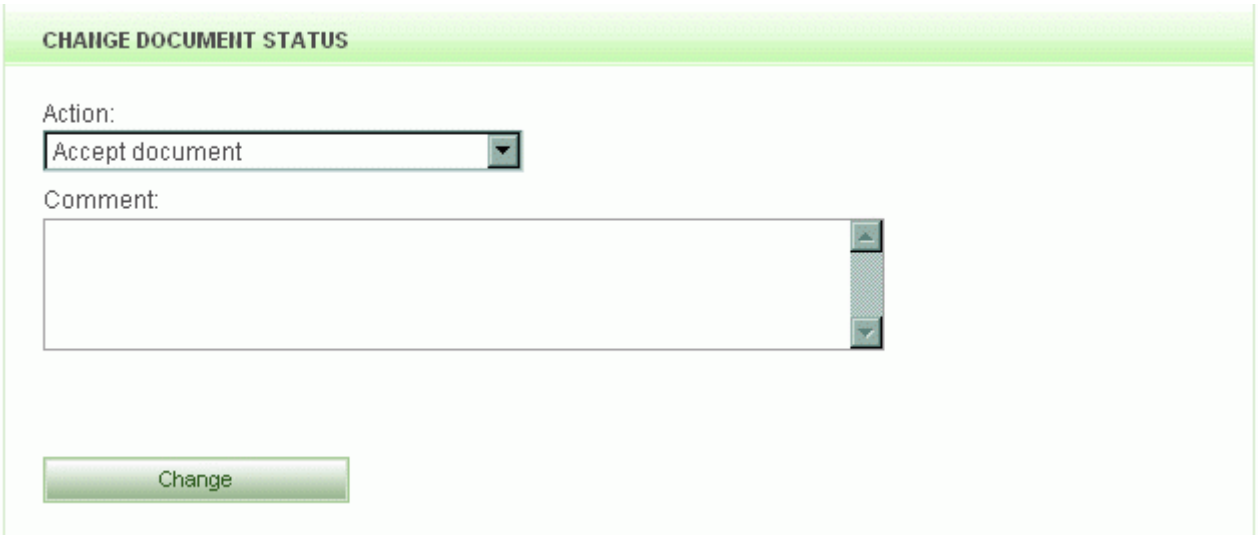
2. Frolov N.N. gets an e-mail message that he became a document user.



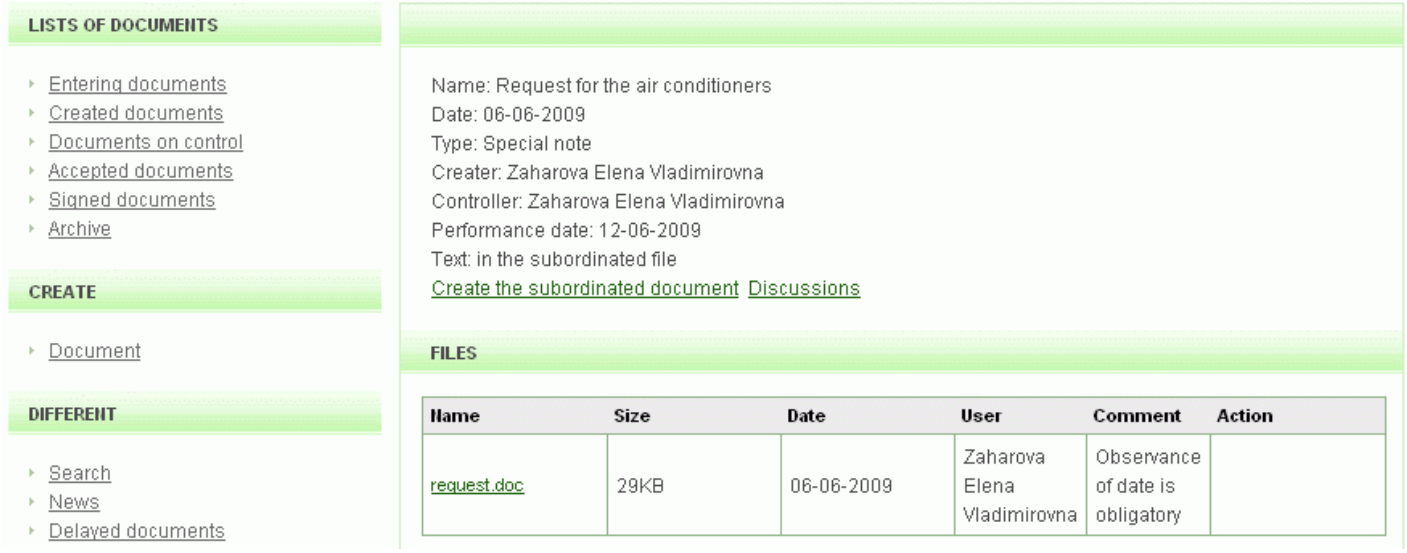
He opens the subordinated file, clicking its name.



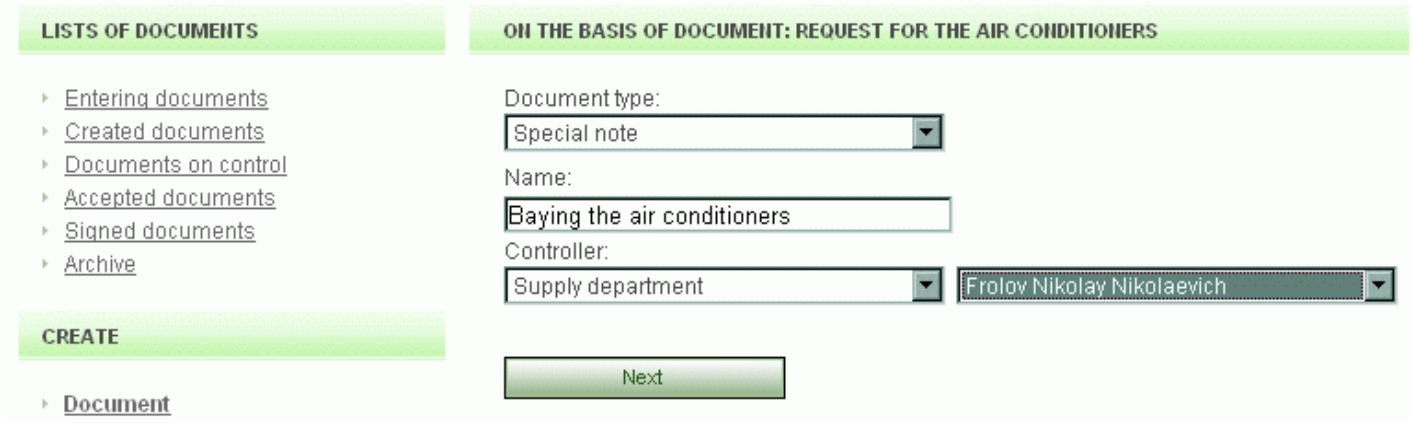
After reading of the document Frolov N.N. decides that he needs to turn over the service note to his deputy Skvortsov S.V. Skvortsov S.V. uses the system "DocumentLite" too.
In the document status Frolov N.N. chooses "Accept document" and clicks "Add". After that the document passes to the folder "Accepted documents". Zaharova E.V. gets an e-mail message that Frolov accepted the document.



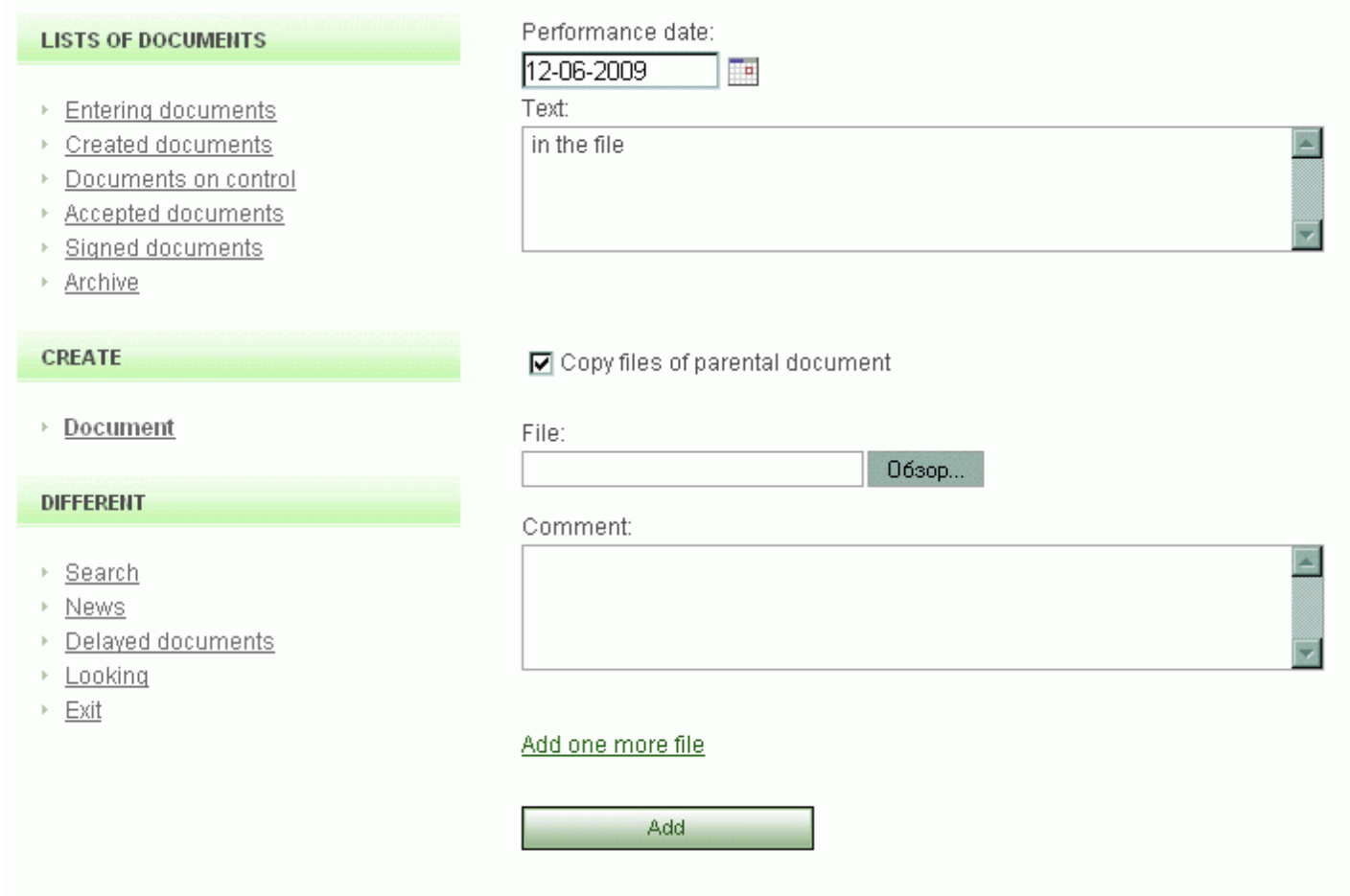
To send the document to Skvortsov S.V. Frolov N.N. opens the folder "Accepted documents ", enters the document and clicks the reference "Create the subordinated document".



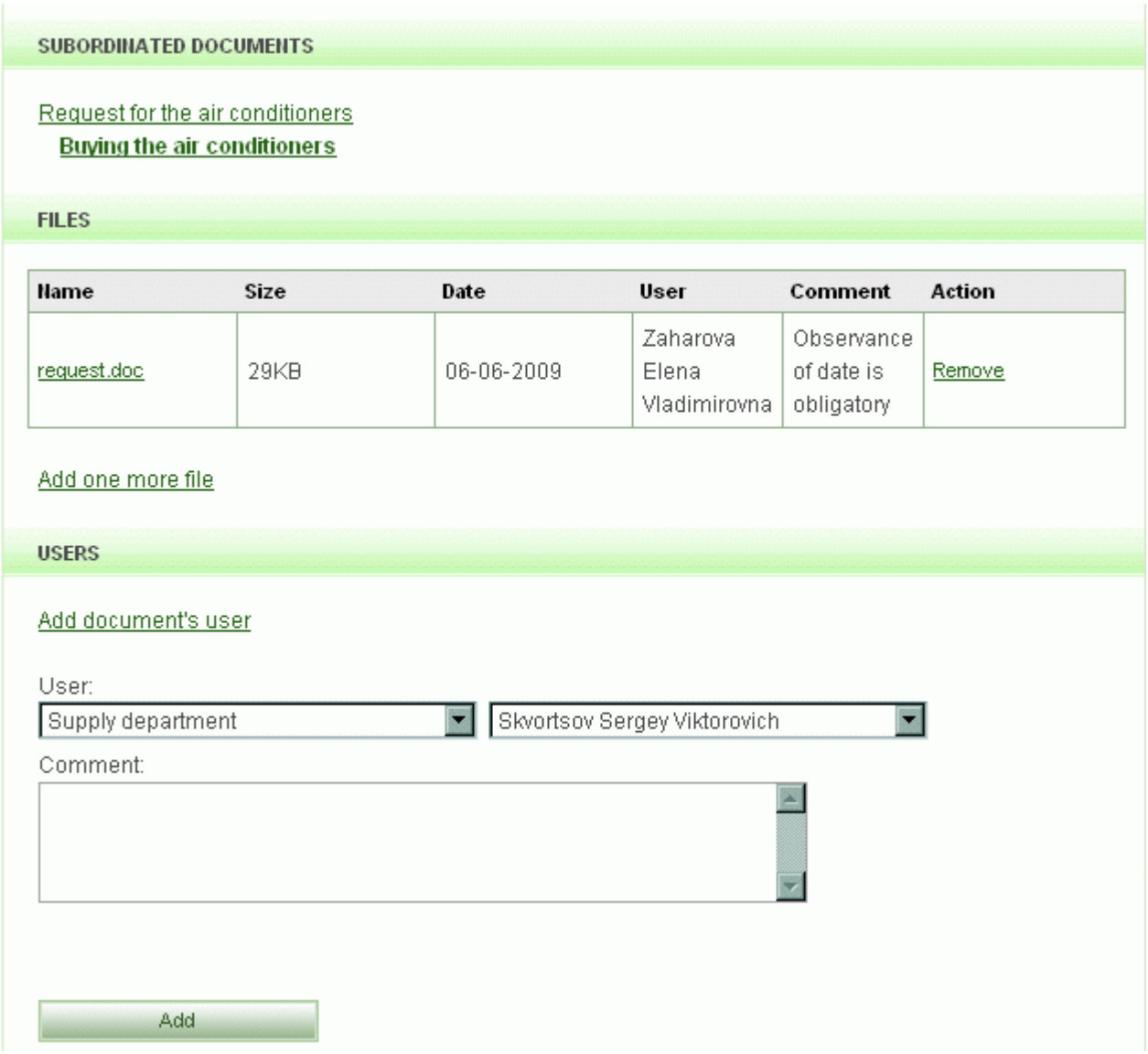
In the opening window he chooses the document type "Special note" and makes himself a controller.



He clicks the button "Next" and gets a new form of additional fields of document.

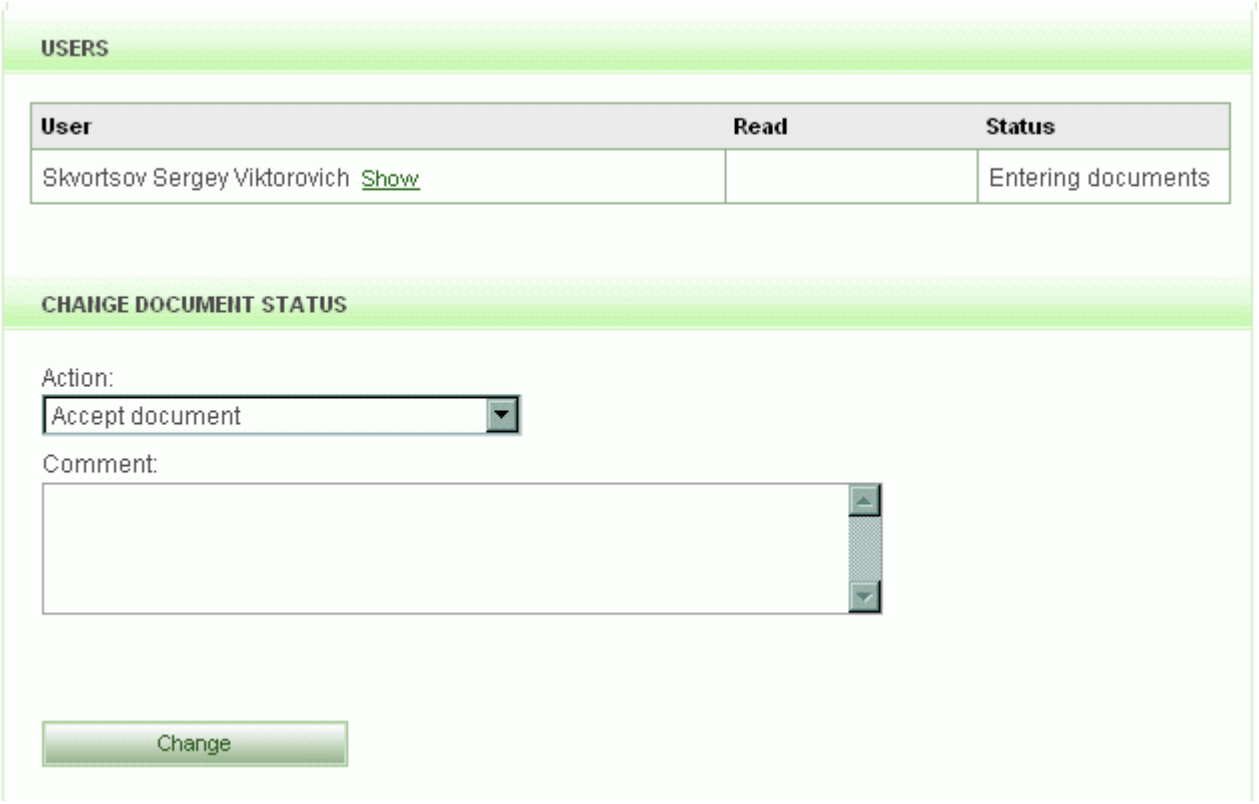


He fills the needed fields and tick off near the "Copy files of parentall document". Then clicks the button "Add", chooses the user in the document Skvortsov S.V.



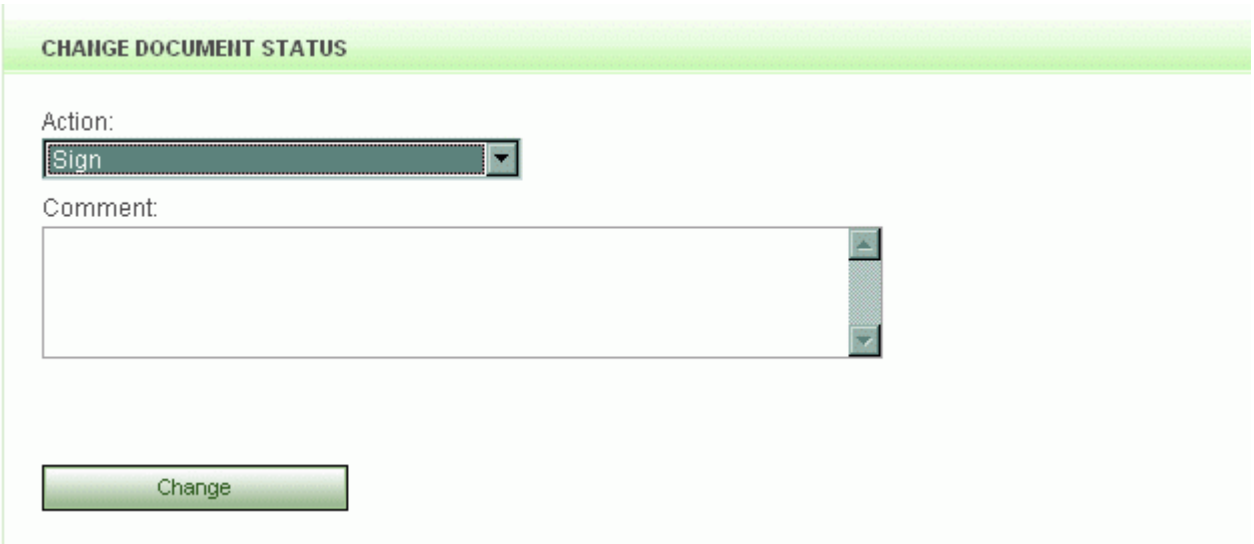
Then he clicks the button "Add".

3. 3. Skvortsov S.V. gets an e-mail message that he became a document user. He opens it, reads, chooses the action "Accept document" and clicks the button "Change".

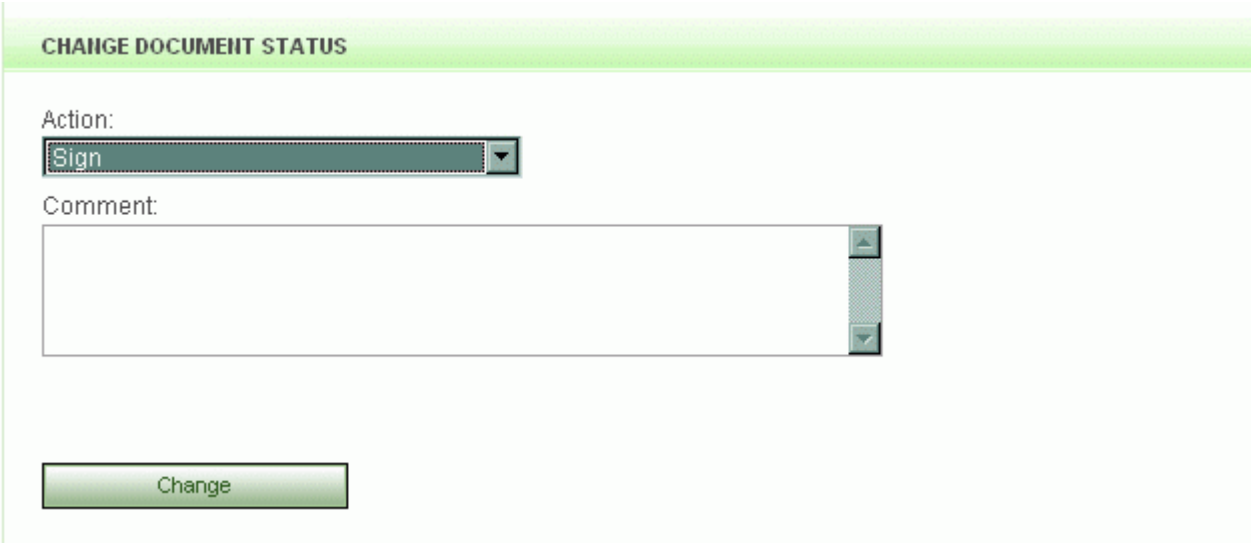


After that he works on buying of the ordered air conditioners.

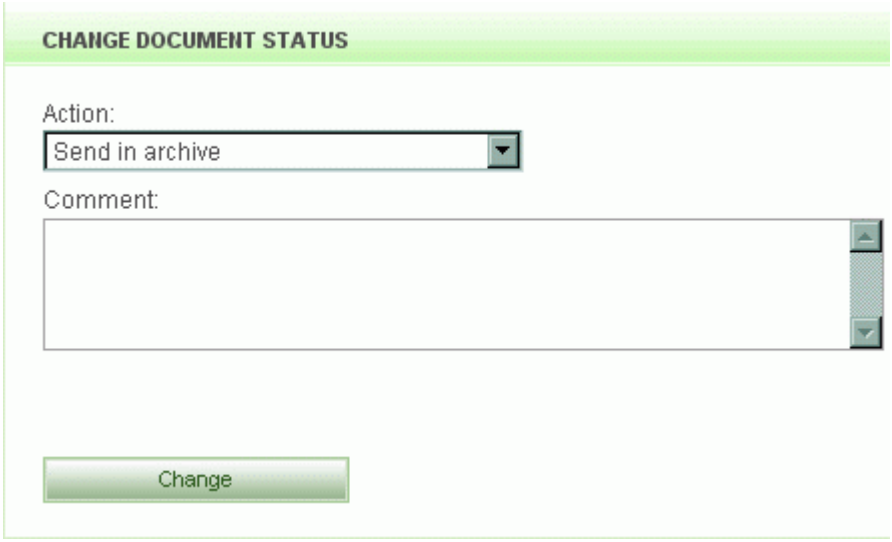
When all works were made, air conditioners were bought, Skvortsov S.V. opens the document in the folder "Accepted documents" and types the status "Sign". Then he clicks the button "Change", after that the document passes to the folder "Signed documents".



4. Frolov N.N. gets an e-mail message that the document user changed the status of document, enters the system "DocumentLite", opens in the folder "Accepted documents" the document, choosing the action "Sign", clicks the button "Change".



Then he opens the folder "Documents on control", finds the subordinated document and sends it to "Archive".



5. Zaharova E.V., a chief of the staff office, gets an e-mail message that the document user changed the status. She opens the document and sends it to "Archive'.