



# fileSMART for Property Management Workflow Assist Setup and Use Guide

## Overview

### Introduction

fileSMART Workflow Assist is your automatic Assistant able to independently open your suppliers emails read the attachment for you and then process that attachment without you having to deal with the emails yourself. It eliminates the need for scanning documents it eliminates manually printing documents, it eliminates the need for a pending queue. Instead of asking creditors to send invoices to your personal email address have creditors send invoices to a generic email address such as [invoices@yourrealestate.com.au](mailto:invoices@yourrealestate.com.au)

where fileSMART Workflow Assist can read and process your invoices for you. Think of an easy 'hands free' invoice Workflow process think fileSMART Workflow Assist.

In order to use fileSMART Workflow Assist you will need to be familiar with fileSMART document workflow and in particular Barcoded workflow and QR Code workflow. It is recommended that you read the 'fileSMART for Property Management - Workflow Setup and Use' and the 'fileSMART for Property Management - Workflow QR Code Setup and Use guide' which will explain the concept and setup of fileSMART workflow and the use of the various workflow options that work in conjunction with fileSMART Workflow Assist.

### [fileSMART Workflow Assist Tutorial](#)

## Pre-requisites

1. Training is required to activate fileSMART Creditor Disbursements needed for processing the approval workflow invoices in REST Professional, email [training@rockend.com.au](mailto:training@rockend.com.au) for further details or contact Rockend to book today.
2. REST Professional v12.5.07 and fileSMART v6.5 must be installed to use all of the integration features. Refer to your fileSMART Help Documentation for installation instructions and instructions on the new invoice workflows in fileSMART.

3. REST Professional & fileSMART integration must be setup to use this feature. This integration is available from REST Professional version v12.5.07.

## Activating Workflow

If you have not used workflow in the previous versions of fileSMART you can only use the Ad-hoc workflow. Using the more advanced Invoice Workflows requires a consulting session with a Rockend consultant.

Please contact the Learning & Education Team on 1300 657 700 or email [training@rockend.com.au](mailto:training@rockend.com.au) for further details.

## What is Needed to Setup Workflow Assist

1. Workflow Assist reads new emails and changes the status of a new email from unread to read and replied. In order for this to work correctly you need to have dedicated email mailboxes for the Workflow Assist Program. For example for Council rates you would have [councilrate@myrealty.com.au](mailto:councilrate@myrealty.com.au) for water rates you could have [waterrates@myrealty.com.au](mailto:waterrates@myrealty.com.au) for strata levies you could have [stratalevies@Myrealty.com.au](mailto:stratalevies@Myrealty.com.au) you can have as many email mailboxes as you like and Workflow Assist can read from any one of them.
2. You will need to connect to Workflow Assist by IMAP that is the only way Workflow Assist can connect to an email address. Speak to your IT Consultant and if unsure get them to set it up.
3. Ensure you have virus protection on your email server this is important for any mailbox receiving emails in your organisation not just for Workflow Assist. It is your responsibility and risk so you must ensure that all emails received are scanned for possible virus threats.
4. For council rates, Water rates, Strata Levies and invoices setup up an email rule on your email server to only receive emails from the creditors you have provided an email address to for Workflow Assist in most cases it will only be a small number of email addresses.

## fileSMART Workflow Assist Overview

fileSMART Workflow Assist provides a way to replace a paper based document and invoice handling and approval process with an email system. Automatically read invoices such as council rates, water rates, power bills, and strata levies received by email with the attached document automatically read and the archive and invoice data auto completed. All the existing types of workflow remain intact just the way in which an invoice or document is received and then pushed to a user will be dramatically improved with increased efficiency gained by the use of email as a method of receiving invoices from suppliers.

The need to scan a document to get it into the workflow is gone.

The need for a pending queue is gone.

The need for any hands on involvement to workflow an invoice to the right user is gone.

In order to auto read and complete the archiving and invoicing data:

- The invoices must have an acceptable Barcode or QR Code type. BPAY QR Codes are an example of acceptable QR code types.
- The creditor details, Biller code and QR Code setup must be configured in REST Professional and the Customer Reference Number (CRN) of the bill also configured in REST Professional.

## Release Features in Detail

### fileSMART – Workflow Assist

fileSMART Workflow Assist is designed to take advantage of the improved efficiency and productivity gains that email distribution of documents and invoices can provide. The new fileSMART Workflow Assist program is designed to provide a simple and intuitive step by step solution for email and Workflow setup and handling.

Workflow Assist provides a configuration screen for all workflow configuration options and allows the client to configure automatic workflows for REST Professional trusts. Workflow Assist contains a Workflow configuration page and a Workflow Inbox for workflow processing from multiple email mailboxes.

### Email Workflows Available Through Workflow Assist

In most cases the email will be sent by a supplier to a Property Management agency. For the purpose of illustration the first step of performing a Workflow Assist email workflow is to send an email to a Workflow Assist mailbox which will be read by the program and the attached invoice will be extracted from the email. If a PDF file or a TIFF file is extracted Workflow Assist checks for QR Codes or Barcodes so that it can attempt to pre-fill all fields automatically. The

Workflow Assist program will be able to handle two type of documents. Ad-hoc documents that have no QR Code or Barcode but an agency wants to place into a user's workflow queue for processing. Or a QR Code or Barcode invoice where all the meta-data fields for fileSMART QR Code or Barcode workflow can be pre-filled.

## Workflow Assist - Ad-hoc

The process of receiving and creating a Workflow Assist, new Ad-hoc workflow is predominantly a hands-off set of steps as the document when received as an email does not need to be scanned and no pending queue handling needs to take place, but no information on the invoice tabs can be pre-filled.

1. An email arrives in the Workflow Assist Inbox and the automatic tasks in background open the email.
2. The task then looks for an attachment or multiple attachments the attachments must be of type Tiff or PDF no other attachment types are supported. If a Tiff or PDF attachment is found and as an Ad-hoc document has no QR Code or Barcode the document is still be placed in a managers workflow queue for processing the folder will be selected but the meta-data for document and invoice details for the workflow will need be pre-filled by a manager or selected workflow user.

## Workflow Assist - Invoice

The process of receiving and creating a Workflow Assist, new Invoice workflow is predominantly a hands-off set of steps as the document when received as an email does not need to be scanned and no pending queue handling needs to take place, but no information on the invoice tabs can be pre-filled.

1. An email arrives in the Workflow Assist Inbox and the automatic tasks in background open the email.
2. The task then looks for an attachment or multiple attachments the attachments must be of type Tiff or PDF no other attachment types are supported. If a Tiff or PDF attachment is found and as a invoice document today has no QR Code or Barcode the document is still placed in a managers workflow queue for processing the folder will be selected but the meta-data for document and invoice details for the workflow will need be pre-filled by a manager or selected workflow user.

## Workflow Assist - QR Code or Barcode Invoice

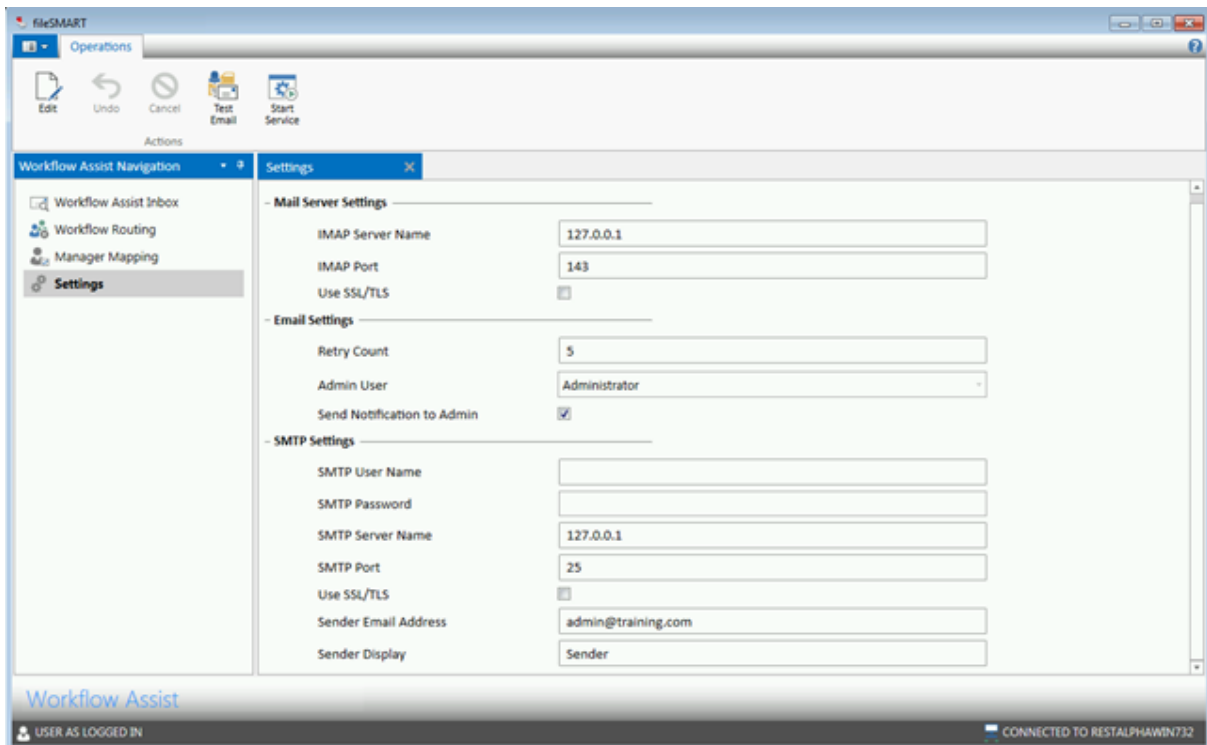
The process of receiving and creating a Workflow Assist, new QR Code or Barcode workflow is a completely hands-off set of steps as the document when received as an email does not need to be scanned and no pending queue handling needs to take place and a QR Code or Barcode can be automatically read and all document and invoice tabs can be pre-filled.

1. An email arrives in the Workflow Assist Inbox and the automatic tasks in background open the email.
2. The task then looks for an attachment or multiple attachments the attachments must be of type Tiff or PDF no other attachment types are supported.
3. A Tiff or PDF attachment is found the attachments are extracted and sent to the next step for further processing.
4. Scans the Tiff or PDF attachment file for a QR Code or a Barcode.
5. If the QR Code or Barcode can be read the information from that QR Code is matched to the Creditor and Property in REST Professional.
6. The invoice is then placed in the matching Managers workflow queue along with all the pre-filled document tab details and the Invoice tab details for the manager's approval.

From the moment the QR Code or Barcode invoice is received as an email attachment no hand-on effort is required. The more REST Professional clients ask their suppliers to add QR Codes to invoices the more invoices will arrive in a user workflow queue with all information already filled in.

## Settings

Workflow Assist doesn't use an email client such as Microsoft Outlook to receive its emails. It has its own email engine that receives emails from your email servers. The Workflow Assist program will directly connect to any number of mailboxes on the one email server via IMAP. The IMAP server can be your internal email exchange server or an external one belonging to your Information Service Provider (ISP).



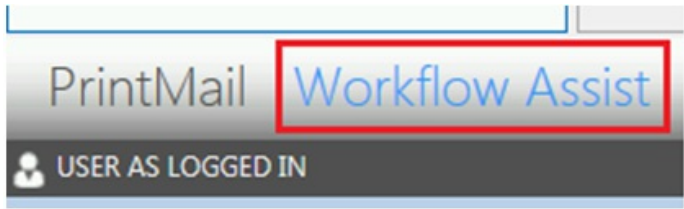
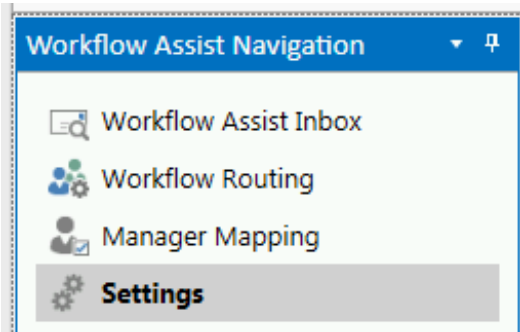
The fields on the screen above have the following meaning:

Column Name	Purpose
<b>IMAP Server Name</b>	Name of the IMAP Server for connection of all Workflow Assist mailboxes.
<b>IMAP Port</b>	IMAP port to connect to for mailbox connection.
<b>Use SSL/TLS</b>	If required to use a secure connection for IMAP use SSL or TLS
<b>Retry Count</b>	Number of times Workflow Assist should try to connect to the IMAP Server and process emails.
<b>Admin User</b>	Administrator who will receive all alert messages from Workflow Assist for emails in error or warning when attempting to workflow an email attachment.
<b>Send Notification to Admin</b>	Tick the option if the Administrator wants to receive alerts of emails in error or warning.
<b>SMTP User Name</b>	The user name that will be used to connect to the SMTP Server to send Error and Warning email alerts. If already using PrintMail, Workflow Assist uses the same SMTP configuration as PrintMail.

<b>SMTP Password</b>	The SMTP user Password that will be used. If already using PrintMail, Workflow Assist uses the same SMTP configuration as PrintMail.
<b>SMTP Server Name</b>	SMTP server name to send alert emails. Note that the same SMTP server as the PrintMail server will be used by default.
<b>SMTP Port</b>	SMTP server port number
<b>Use SSL/TLS</b>	If required to use a secure connection for SMTP use SSL or TLS
<b>Sender Email Address</b>	The email address that the alerts will be sent from.
<b>Sender Display</b>	The name associated to the sender email address for the Administrator alerts.

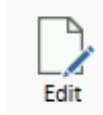
## Follow These Steps to Setup the Workflow Assist Settings Page

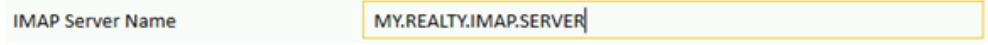



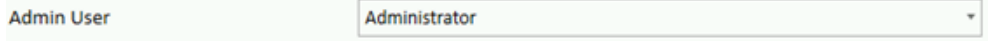
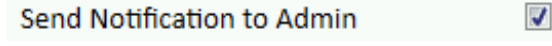

In order to setup your Workflow Assist configuration screen you will need to have certain information which will be provided by your IT Consultant. You will need an IMAP server name or an IMAP server IP address along with the IMAP port number and whether the connection uses a secure connection SSL/TLS. You will need to provide an administrator mailbox so that you can receive notifications if a Workflow fails.

Step	Description
1.	<p>Select the Settings menu in the Workflow Navigation list. To select the Workflow navigation menu click on the Workflow Assist name at the bottom left hand corner of the fileSMART screen.</p>  <p>The Workflow Assist Navigation menu will appear in the navigation pane.</p>  <p>Select the Settings menu.</p>



## Settings

In the Settings screen select the 'Edit' actions button in top left hand corner. The Edit button is only available when the Workflow Assist 'Service' is stopped.



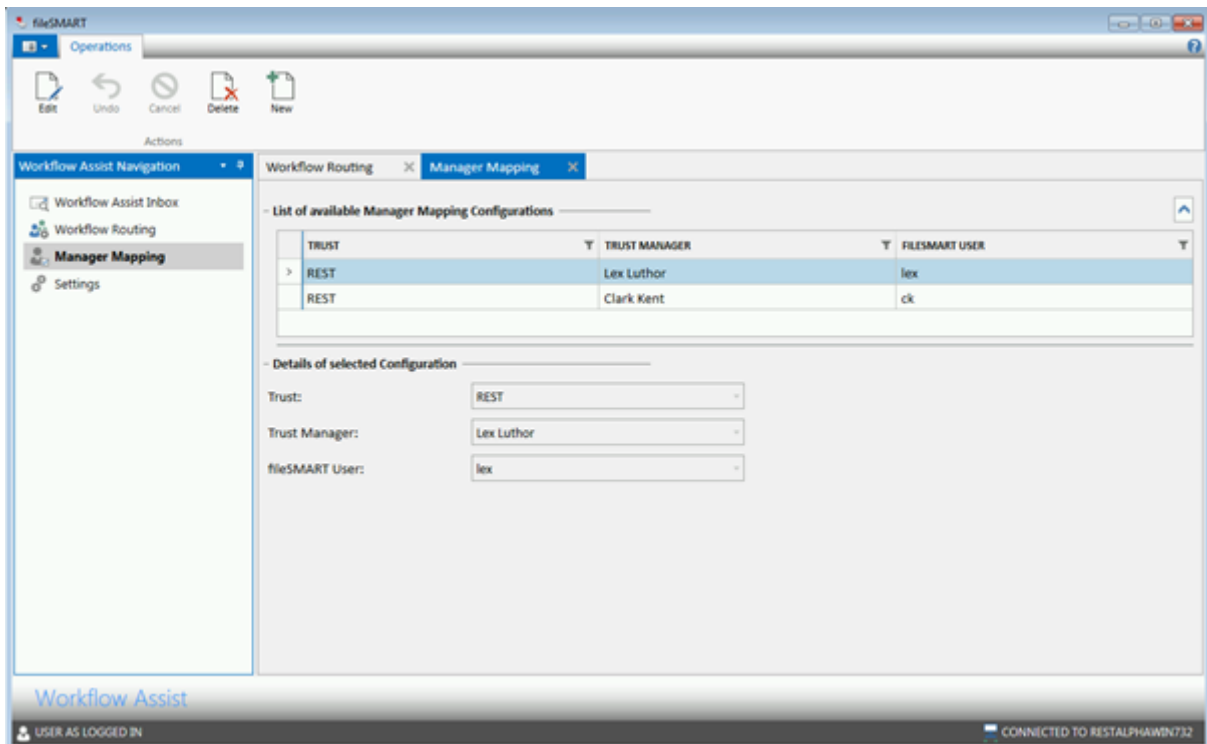
2.	Add an 'IMAP server name' The IMAP Server will be setup by your IT consultant please ask them for the name to type into the field.  A screenshot of a form field labeled "IMAP Server Name" with the text "MY.REALTY.IMAP.SERVER" entered.
3.	Add the 'IMAP Port'. For connection to an IMAP Server you need to provide the correct port number talk to your IT Consultant for the right port number to use.  A screenshot of a form field labeled "IMAP Port" with the number "143" entered.
4.	Tick the SSL/TLS box if using a secure connection to the IMAP server please speak to your IT Consultant if you are not sure.  A screenshot of a checkbox labeled "Use SSL/TLS" which is checked.
5.	Add the 'Retry Count' the retry count is the number of times the Workflow Assist program will attempt to connect to the IMAP Server name you have entered and process emails.  A screenshot of a form field labeled "Retry Count" with the number "5" entered.
6.	Add the 'Admin User' The Admin user name is used when sending alerts to the admin user for any workflow items that have failed.  A screenshot of a dropdown menu labeled "Admin User" with "Administrator" selected.
7.	Tick the 'Send Notification to Admin' The send notification to Admin is ticked when wanting to receive notification of Workflow routing failures.  A screenshot of a checkbox labeled "Send Notification to Admin" which is checked.
8.	Add the 'Admin Email Address'. The admin email address is the admin users mailbox where notification emails will be sent when a Workflow routing failure occurs.  A screenshot of a form field labeled "Admin Email Address" with the text "acc5@training.com" entered.
9.	The SMTP Settings are used to send the email notification for Workflow Routing errors.



	<p>Add the 'SMTP User Name' if you require an SMTP user name to connect to the SMTP server enter the details here.</p> <p>If no user name is required leave it blank.</p> <p>SMTP User Name <input type="text"/></p>
10.	<p>Add the 'SMTP Password' if you require an SMTP password to connect to the SMTP server enter the details here.</p> <p>If no password is required leave it blank.</p> <p>SMTP Password <input type="password"/></p>
11.	<p>Add an 'SMTP server name' The SMTP Server will be setup by your IT consultant please ask them for the name to type into the field.</p> <p>SMTP Server Name <input type="text" value="127.0.0.1"/></p>
12.	<p>Add an 'SMTP Port' If you are unsure of the Port number to use speak to your IT consultant for the correct port number to use.</p> <p>SMTP Port <input type="text" value="25"/></p>
13.	<p>Tick the SSL/TLS box if using a secure connection to the SMTP server please speak to your IT Consultant if you are not sure.</p> <p>Use SSL/TLS <input checked="" type="checkbox"/></p>
14.	<p>Add the 'Sender Email Address' The Sender Email Address is the email address used when sending emails.</p> <p>Sender Email Address <input type="text" value="admin@training.com"/></p>
15.	<p>Add the 'Sender Display' The Sender Display is the email display name when sending emails.</p> <p>Sender Display <input type="text" value="Sender"/></p>
16.	<p>In order to save the changes made press the Save button in the Actions pane.</p> <p> Save</p>
17.	<p>Start the Workflow Assist service so that the Settings changes can take effect.</p> <p> Start Service</p>

# Manager Mapping

The manager mapping screen allows an Administrator to map the corresponding REST Professional manager to the workflow user in fileSMART. Simply match the REST Professional user to the corresponding fileSMART user. That fileSMART user is then used for the workflow configuration in the Workflow routing configuration screen. Manager mapping is used in conjunction with the Auto Select option on the Workflow routing configuration page this allows the correct Property manager to be matched to the correct property record.

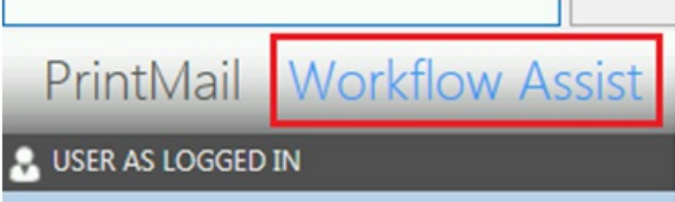
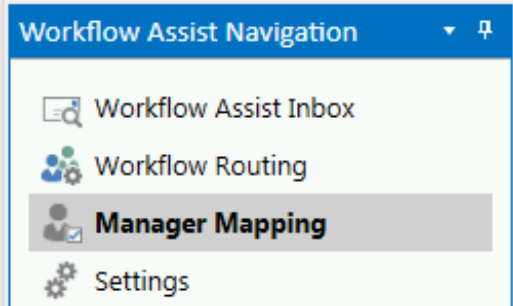

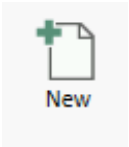
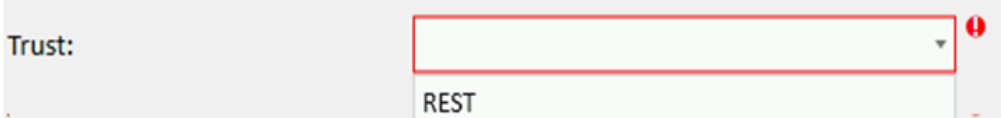



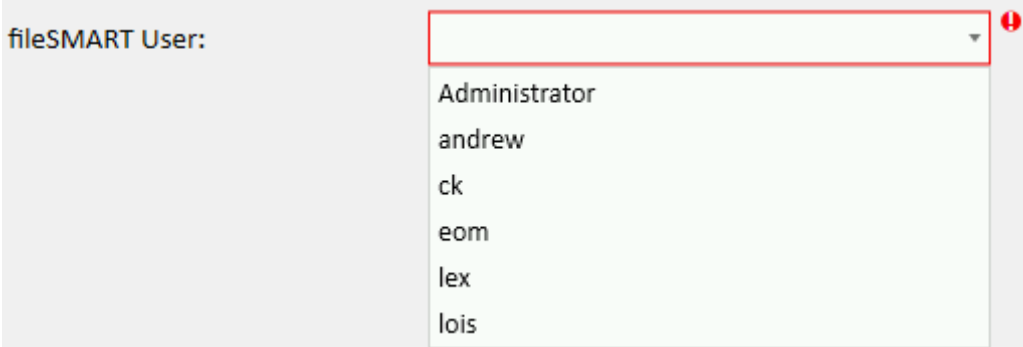
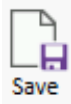
The meaning of the columns is as follows:

Column Name	Purpose
<b>Trust</b>	The REST Professional trusts where the documents will workflow to.
<b>Trust Manager</b>	The trust manager in REST Professional.
<b>FileSMART User</b>	The corresponding REST Professional user defined in fileSMART User Management.

## Follow These Steps to Setup the Manager Mapping Users in Workflow Assist

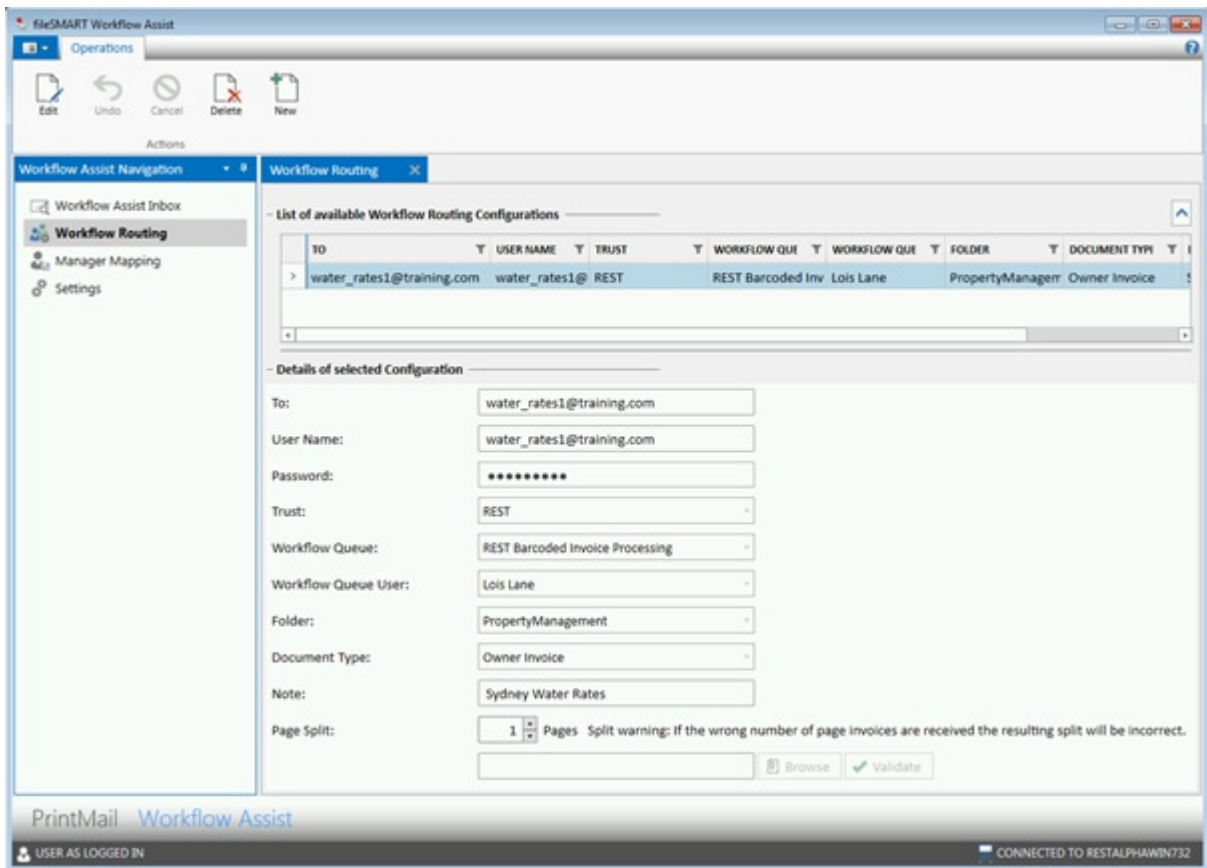
In this example we will setup a Manager mapping for one of the users in REST Professional and fileSMART. The Manager mapping is required in order to match the corresponding user in REST Professional to the users in fileSMART.

Step	Description
<p>1.</p>	<p>Select the Manager Mapping menu in the Workflow Navigation list. To select the Workflow navigation menu click on the Workflow Assist name at the bottom left hand corner of the fileSMART screen.</p>  <p>The Workflow Assist Navigation menu will appear in the navigation pane.</p>  <p>Select the Manager Mapping menu.</p>  <p>In the Manager Mapping screen select the 'New' actions button in top left hand corner.</p> 
<p>2.</p>	<p>Use the drop down menu to select the available trust, if you have multiple trusts available it will display all the trusts you have integrated with fileSMART.</p>  <p>In the example shown the 'REST' trust will be selected.</p>
<p>3.</p>	<p>Use the second drop down menu to select the users configured in REST.</p>

	 <p>In the example above Clark Kent is selected.</p>
<p>4.</p>	<p>Use the third drop down menu to select the fileSMART users configured in fileSMART.</p>  <p>In the example above the user ck is selected.</p>
<p>5.</p>	<p>In order to save that new manager mapping press the save button in the Actions pane.</p> 

## Workflow Routing Configuration Screen

A workflow routing configuration screen is available to provide complete visibility of all workflow rules defined to allow any number of users to be setup to receive documents to their workflow queue from the Workflow Assist component.



The fields on the screen above have the following meaning:

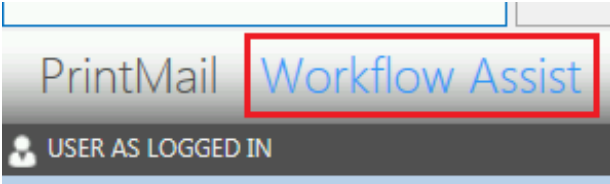
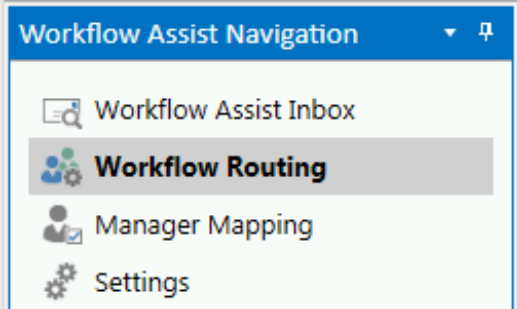

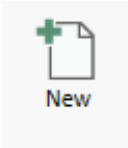
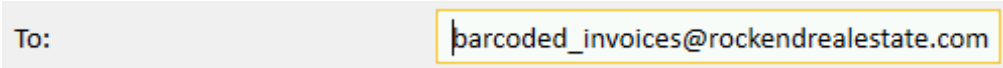
Column Name	Purpose
To	Email mailbox that is used for receiving messages. Any number of inbox's can be defined. For example an <a href="mailto:Adhoc@rockrealestate.com.au">Adhoc@rockrealestate.com.au</a> , <a href="mailto:invoices@rockendrealestate.com.au">invoices@rockendrealestate.com.au</a> , <a href="mailto:rates@rockendrealestate.com.au">rates@rockendrealestate.com.au</a> can be defined to direct different invoices or documents to different users and work queues in the business.
User Name:	For IMAP connections to a Microsoft Exchange server a 'User Name:' needs to be entered. For other IMAP Email server types the 'To:' address value needs to be entered.
Password	The password for automatic logon to the associated mailbox.
Trust	The REST Professional trusts where the documents should workflow to.
	Depending on the trust selected the Workflow queue will display

<b>Workflow queue</b>	the appropriate queue for that trust type, for example REST.
<b>Workflow Queue User</b>	Select a user to send the workflow email to or if QR Code or Barcode workflow is select you can opt to Auto Select the user based on the Property code selected when the barcode is read.
<b>Folder</b>	Select the folder where the email attachment will be archived to once the Workflow is approved. Based on the Workflow queue selected the Folders available will then display for only the folder types applicable for the Workflow queue
<b>Document Type</b>	Select the document type you want to allocate the email attachment to when placed in the workflow.
<b>Note</b>	A message can be entered into the note field of up to 60 characters in length this will pre-fill the message into the notes field in the Workflow Document data tab for each document that is processed by Workflow Assist.
<b>Page Split</b>	If a batch of invoices in an email attachment is received from an Multi-function device you can nominate to split the document attachment received every number of pages automatically.
<b>Browse</b>	In order to use a Workflow Assist routing rule you will need to first test and validate the Workflow routing rule you create. In order to test a new rule select a sample tiff file attachment to send as a validation test.
<b>Validate</b>	In order to start using the Workflow Routing rule you have created you will need to Validate the rule. Once validated make sure to save the changes otherwise that Workflow Routing rule will not be active.

## Follow These Steps to Setup a Workflow Routing Rule

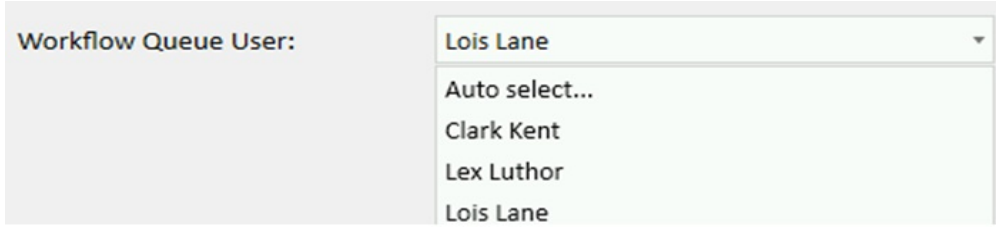
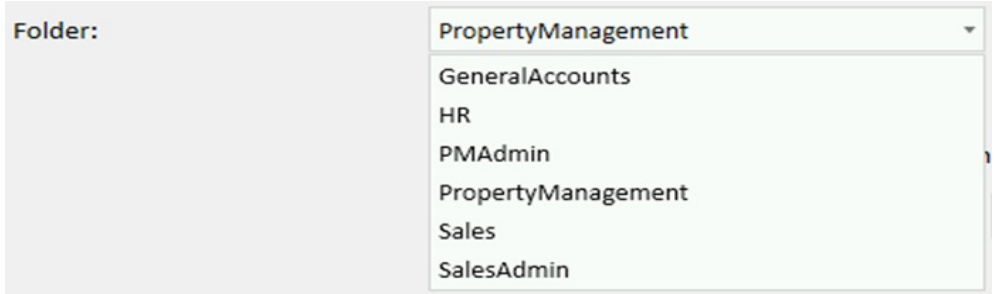
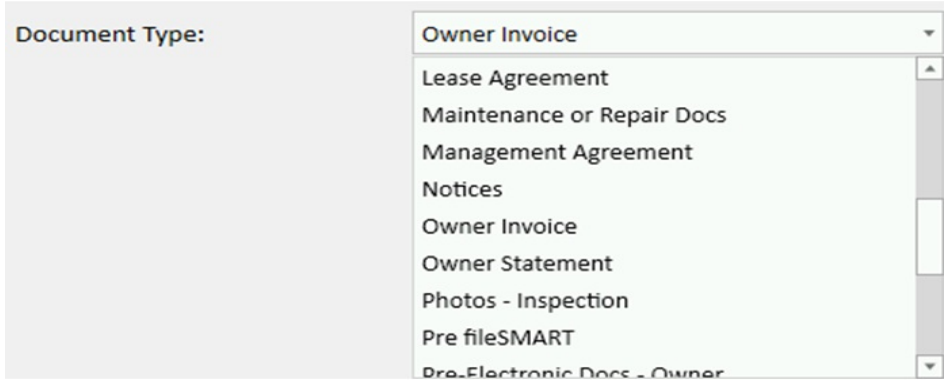
In this example we will setup a Workflow for [barcode\\_invoices@rockendrealstate.com.au](mailto:barcode_invoices@rockendrealstate.com.au) which will receive rates notices and Strata Levies that have a QR Code and Water Rates that have a barcode which will pre-fill the workflow tab information so that no hands on processing of the document needs to take place. The important thing to remember when setting up your Workflow routing rules is that the “Workflow queue” controls how the emails received in that

inbox are processed. If you have a number of barcoded or QR Coded invoices that you can receive via email then they could all be sent to the one email mailbox for example ([barcode\\_invoices@rockendrealstate.com.au](mailto:barcode_invoices@rockendrealstate.com.au)) and if the Workflow queue selected was 'REST Barcoded invoice processing' then all email attachments will be checked and scanned for a barcode or QR Code.

Step	Description
1.	<p>Select the Workflow Routing menu in the Workflow Navigation list. To select the Workflow navigation menu click on the Workflow Assist name at the bottom left hand corner of the fileSMART screen.</p>  <p>The Workflow Assist Navigation menu will appear in the navigation pane.</p>  <p>Select the Workflow Routing menu.</p>  <p>In the Workflow Routing screen select the 'New' actions button in top left hand corner.</p> 
2.	<p>Add an email address to be used as your 'To:' address this is the address you will give to the creditors that will send you an email with a barcode or QR Code invoice attached.</p>  <p>Remember that the 'To:' address and in particular the 'Workflow queue': control what type of process that Workflow Assist will perform if it is a REST Barcoded Invoice workflow it will attempt to find a barcode on the attached document or a</p>

	<p>QR Code.</p>
<p>3.</p>	<p>Add the 'User Name:'. For connection to a Microsoft Exchange server or Microsoft 365 IMAP mailbox in addition to the 'To:' email address a user name needs to be provided. Microsoft Exchange server requires a user name in addition to the email address for authentication. For all other IMAP mail servers use the email 'To:' address as your User Name.</p> <div data-bbox="389 461 1394 528" style="border: 1px solid #ccc; padding: 5px;"> <p><b>User Name:</b> <input style="width: 300px;" type="text" value="water_rates1"/></p> </div>
<p>4.</p>	<p>Add the 'Password:' for the email mailbox you are connecting to for the new workflow routing rule.</p> <div data-bbox="389 667 1394 725" style="border: 1px solid #ccc; padding: 5px;"> <p><b>Password:</b> <input style="width: 300px;" type="password" value="••••••••"/></p> </div> <p>Passwords are encrypted on the fileSMART screen please ensure you store the password in a safe place when needed in future.</p>
<p>5.</p>	<p>Add the 'Trust:' if you have only one trust account then that is the only trust that is displayed. If you have more than one REST Trust database the drop down menu will show all the trust that you have to choose from. The trust you select will be the trust library where your invoice will be archived to.</p> <div data-bbox="389 1048 1378 1137" style="border: 1px solid #ccc; padding: 5px;"> <p><b>Trust:</b> <input style="width: 150px;" type="text" value="REST"/></p> </div> <p>In the example above the trust database is called 'REST'</p>
<p>6.</p>	<p>Add the 'Workflow Queue:' the three options available are Ad-hoc, REST Invoice Processing and REST Barcoded Invoice Processing.</p> <div data-bbox="389 1335 1390 1518" style="border: 1px solid #ccc; padding: 5px;"> <p><b>Workflow Queue:</b> <input style="width: 150px;" type="text" value="REST Barcoded Invoice Processing"/></p> <ul style="list-style-type: none"> <li>Ad-hoc</li> <li>REST Barcoded Invoice Processing</li> <li>REST Invoice Processing</li> </ul> </div> <p>Ad-hoc or REST Invoice processing is designed for invoices or documents with no barcode or QR Code. When selecting Ad-hoc and REST Invoice Processing make sure to select a specific 'Workflow Queue User and the workflow tabs cannot be pre-filled by Workflow Assist.</p> <p>For Barcoded and QR Coded invoices you can use either 'Auto Select' or a specific 'Workflow Queue User' if a barcode or QR Code is successfully read from the invoice all the invoice workflow fields will be pre-filled by Workflow Assist.</p> <p>Remember that the 'To:' address and in particular the 'Workflow queue': control what type of process that Workflow Assist will perform if it is a REST Barcoded Invoice workflow it will attempt to find a barcode on the attached document or a QR Code.</p>



<p>7.</p>	<p>Add a 'Workflow Queue User'. Workflow Queue Users are setup in the Manager Mapping screen you will need to link your fileSMART Workflow users to your REST users or trust accountant to be able to select specific users from the drop down menu. If you have selected a 'Workflow Queue:' in step 6 of Ad-hoc or REST Invoice processing it is recommended that you select an actual 'Workflow Queue User' not the 'Auto Select' option. For REST Barcoded invoice processing you can use 'Auto Select' if you would like the REST user to be selected based on the Property selected from reading the Barcode or the QR Code or select one of the Workflow Queue Users for example if you would like all invoices to go to the Trust Accountant. For example.</p> 
<p>8.</p>	<p>Add a 'Folder:'. A dropdown menu is provided to select the folders you have available in your REST Trust Library. Depending on the Workflow Queue in Step 6 it will only allow you to select the types of folders that are applicable in fileSMART based on the Workflow Queue. For example.</p> 
<p>9.</p>	<p>Add a 'Document Type:'. A dropdown menu is provided to select the Document Types you have available depending on your folder selection in Step 8. For example.</p> 
<p>10.</p>	<p>Change the 'Note:'. Text can be entered in the Note field of up to 80 characters. The same text will then appear in the Notes panel in the Document data tab in workflow for invoices processed by workflow Assist. For example</p>

Note:

Sydney Water Rates

11. Change the 'Page Split:'. Page Split should be used when you send a batch of invoices to Workflow Assist which you then need to separate in to individual workflow invoices. For example if you have 50, 1 page invoices in a PDF file which you would send by email to Workflow Assist then set the Page Split value to 1. Split page will be extremely handy when you batch scan Council rates to Workflow Assist using your Multi-function device. Otherwise please leave it at zero.

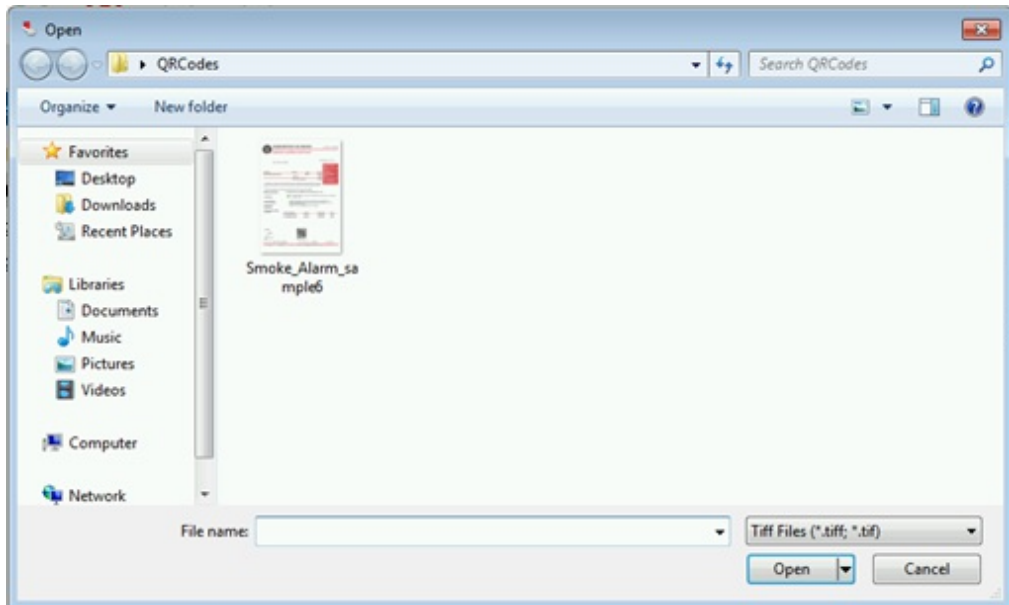
Page Split:  Pages Split warning: If the wrong number of page invoices are received the resulting split will be incorrect.

12. Once you have completed the configuration steps you will need to Validate the Workflow routing rules you have just added in order to be able to use that new Workflow route. Workflow validation is a safe guard to ensure the rules selected will work.

Select the browse button



Pressing the browse button opens a window to select a tiff file for the validation test. To validate a routing rule you will need to use a tiff file simply save a tiff file from fileSMART Archive to the desktop and use that tiff file for your validation rule.



Select the tiff file and press the open button the file is then displayed in the selected file window.



Press the validate button to ensure that the Workflow Routing can process the routing rules which you have configured.



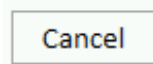
Validation will then show all steps taken to attempt to process the tiff file whether successful or not. If some steps are unsuccessful please review each step and make changes to fix the issue.



If all steps are successful you are then able to approve the Workflow Routing rule you have created.

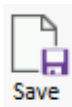


If the any of the steps fail then Cancel the validation and correct the problem listed.

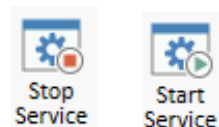


If any of the steps fail then you will not be able to approve the Workflow Routing rule and you will not be able to process invoices from that email mailbox until all steps are correct.

13. In order to save that new Workflow Routing rule press the save button in the Actions pane.



14. In order for the new Workflow Routing rule to take affect you will need to stop and then restart the Workflow Routing Service found in the Workflow Settings screen.



All fields above provide automatic workflow instructions to the Workflow Assist component to put invoices and documents in the right Workflow queue. If QR Codes and Barcodes are read

then all the current workflow fields in fileSMART archive are also pre-filled and the user only needs to approve the invoice for payment and Archive. The Workflow Assist routing configuration works in conjunction with a standard invoice approval process across your entire team and ensures that it gets followed.

The Workflow Assist program automatically creates workflows for all barcoded invoices and QR Code invoices. The approving manager will then be able to approve and even add to the invoice data with additional details such as the account code and description. fileSMART Workflow Assist eliminates the need for a pending queue, eliminates the need to scan a paper document when received as an email attachment and eliminates hands on involvement to workflow a document to a Property Manager. This will provide a significant reduction in time taken to get a document into the workflow.

Once an invoice is processed by the Workflow Assist component the same Workflow steps that are available today are available to the Property Manager for invoice approval.

If a QR Code or Barcode is read the archive fields are pre-filled automatically as it does today but it is filled by the Workflow Assist component. The meta-data is saved as it moves around from person to person.

## Workflow Assist Inbox

The fileSMART Workflow Assist Inbox provides a view for all the emails that are received by the Workflow Assist component. It provides a completely transparent view, you always know where your documents and invoices are up to with a status for the email and who has responsibility for them. An administrator can access all emails and find out what is occurring to that document.

The screenshot shows the 'Workflow Assist Inbox' window in the fileSMART application. The window title is 'fileSMART' and it has a menu bar with 'Operations' and a toolbar with 'Open', 'Save', 'Delete', and 'Refresh' buttons. Below the toolbar is a navigation pane with 'Workflow Assist Inbox' selected, and other options like 'Workflow Routing', 'Manager Mapping', and 'Settings'. The main area displays a table of email records. The table has columns for DATE, FROM, TO, SUBJECT, WORKFLOW, and STATUS. The status for all records is 'In Workflow'. At the bottom of the table, it says 'TOTAL NUMBER OF ITEMS: 24'. The status bar at the bottom of the window shows 'PrintMail Workflow Assist' and 'USER AS LOGGED IN' on the left, and 'CONNECTED TO RESTALPHU@N732' on the right.

DATE	FROM	TO	SUBJECT	WORKFLOW	STATUS
06/30/2015 11:48:15 AM	acc4@training.com	council_rates@training.co	council rates test	REST Barcode	✓ In Workflow
06/30/2015 10:36:59 AM	acc4@training.com	council_rates@training.co	Waverley council rates	REST Barcode	✓ In Workflow
06/30/2015 10:28:50 AM	acc4@training.com	water_rates1@training.co	test water rates	REST Barcode	✓ In Workflow
01/30/2015 05:32:01 PM	acc4@training.com	council_rates@training.co	council rates	REST Barcode	✓ In Workflow
01/30/2015 04:39:28 PM	admin@training.com	council_rates@training.co	rates	REST Barcode	✓ In Workflow
01/30/2015 04:23:34 PM	acc4@training.com	acc1@training.com	Smoke Alarms Australia	REST Barcode	✓ In Workflow
01/30/2015 03:52:13 PM	acc4@training.com	acc1@training.com	test	REST Barcode	✓ In Workflow
01/30/2015 02:29:24 PM	acc4@training.com	acc1@training.com	plumbing invoice	REST Barcode	✓ In Workflow
01/30/2015 02:15:07 PM	acc4@training.com	acc1@training.com	council rates	REST Barcode	✓ In Workflow
01/30/2015 02:07:41 PM	acc4@training.com	acc1@training.com	plumbing invoice	REST Barcode	✓ In Workflow
01/30/2015 12:50:20 PM	acc4@training.com	acc1@training.com	plumbing invoice	REST Barcode	✓ In Workflow
01/30/2015 11:57:52 AM	acc4@training.com	acc1@training.com	plumbing invoice	REST Barcode	✓ In Workflow
01/30/2015 10:35:18 AM	acc4@training.com	acc1@training.com	rates	REST Barcode	✓ In Workflow
30/09/2015 02:58:26 PM	acc4@training.com	acc1@training.com	Smoke Alarms Australia invo	REST Barcode	✓ In Workflow
29/09/2015 11:36:11 AM	acc4@training.com	acc1@training.com	smoke alarm invoice	REST Barcode	✓ In Workflow

Column Name	Purpose
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<b>Date</b>	Date the email and associated attachment was received
<b>From</b>	Senders email address
<b>To</b>	Email mailbox that is used for receiving messages. Any number of inbox's can be defined. For example <b>adhoc@rockrealestate.com.au</b> , <b>invoices@rockendrealestate.com.au</b> , <b>rates@rockendestate.com.au</b> can be defined to direct different invoices or documents to different managers and folders.
<b>Subject</b>	The subject line of the email received.
<b>Workflow Queue</b>	The workflow queue where the email was sent to.
<b>Status</b>	The status of that workflow email and more importantly the status of the email attachment.

An administrator of the Workflow Assist program will be able to open and view processed emails investigate the cause of a workflow process error or warning. An alert will be sent when a batch of emails fails to workflow.

## Email mailbox(s) Administration

fileSMART Workflow Assist will use IMAP4 to connect to an Email Server. As emails are processed the emails status in the mailbox will be changed to 'read' and 'replied' that way Workflow Assist will know which emails are still outstanding and which have been processed.

Mailbox maintenance must be put into practise for the Workflow Assist mailboxes. Workflow Assist does not delete emails so the deletion or archive of processed emails must be set up by your email server administrator as an email mailbox procedure.

Your email server administrator must put into action a plan to delete emails older than two months to ensure that the mailbox(s) used by Workflow Assist do not become full and no longer accessible to the suppliers that send you invoices as emails and the Workflow Assist program that reads those emails. Please speak with your Email IT technical support staff to put in place mailbox rules and an administration plan for deleting old Workflow Assist emails.

## Virus scanning software

It is of utmost importance that you make sure that your Email server can virus scan all emails that will be sent to fileSMART Workflow Assist to ensure that no possible viruses may exist in the files that fileSMART will receive and the attachments that it may open. All emails suspected

of a virus attachment must be quarantined and not placed in any of the fileSMART Workflow Assist mailboxes. Virus scanning software must always be kept up to date. It is the risk and responsibility of the fileSMART Administrator or IT Consultant to ensure that their Email server and Workflow Assist mailboxes are checked for possible computer virus threats.

## fileSMART Workflow Assist Troubleshooting

If your emails are not being read from the email mailbox, check the following:

- Did you validate the Workflow routing rule that you created? You must validate the Workflow Routing rule before any emails are read from that particular email mailbox.
- If Workflow Assist is reading Barcodes or QR Codes but no workflow tab data is pre-filled does the creditor exist in REST Professional?
- If Workflow Assist is reading Barcodes or QR Codes but no workflow tab data is pre-filled does the creditor have a BPAY or EFT payment type?
- If Workflow Assist is reading Barcodes or QR Codes but no workflow tab data is pre-filled does the creditor have a Biller code in REST?
- Only the one Creditor and Biller Code (except for DEFT creditors) can exist in REST for QR Codes to work.
- For BPAY QR Codes does the creditor have a default account code and item description setup in REST?
- For BPAY QR Codes does the CRN of the invoice exist in REST against a property?
- Is the original QR Code or barcode clear enough? Standard fileSMART Workflow Assist scanning has been optimised to achieve maximum reliability, however if the original image is not clear then the scanned image may need to be processed as a standard (non-barcoded) invoice.

08/09/2017 2:19 pm AEST