Electronic Workflow System Manual

Essential Vocabularies

Electronic Workflow System was developed to maximize Walailuk University's records management in documents, circulars, orders and other documents sending and receiving, both internally and with other parties. The system can help managing tremendous amount of document transaction, reducing complex document activities, enable speed of retrieval, tracking of document status and prevent document lost. The system was developed upon the records management philosophy from "the Regulations of the Prime Minister's Office on Records Management, B.E. 2526."

Department/Basket refers to access point where documents/correspondences are sent to. Mostly, baskets are departmental document receiving point. The basket can be accessed by many users for processing document activities. As for Walailuk University, basket can be an individual inbox

User refers to one who has responsibility in document activities such as sending, receiving, make notes/orders or tracking concerned documents. One user can access many basket (as main department or other department responsible for) according to line of responsibility and authorization which is granted by the system administrator

Incoming Documents refers to incoming documents/correspondences registered. These documents mostly come from other organizations. They are most likely sent to the central registry where they are registered and passed to executives to assign action officer responsible for the document. Documents from other organizations and internal memos can be sent to INFOMA recipients online (both of which are the recipient's incoming documents) to act e.g. make notes about actions to be taken, etc.

Outgoing Documents refers to documents/correspondences/memos to be sent to other departments or organizations. They are mostly signed by executives, and in case correspondences to other organization, signed by CEO. Memo's running reference number is run separately in each department. As for correspondences going to other organizations, the reference numbers are run continuously as one unit throughout the university

Document type refers to documents other than incoming or outgoing documents that has need to run reference number separately such as orders, announcements. The system will run the reference number separately by document type which can be used in a single department or throughout the university.

Series refers to records series for incoming/outgoing documents classified for grouping documents into series. Series example e.g. meeting, cabinet resolution, complaint. This is for grouping document purpose only and will not be run registered number.

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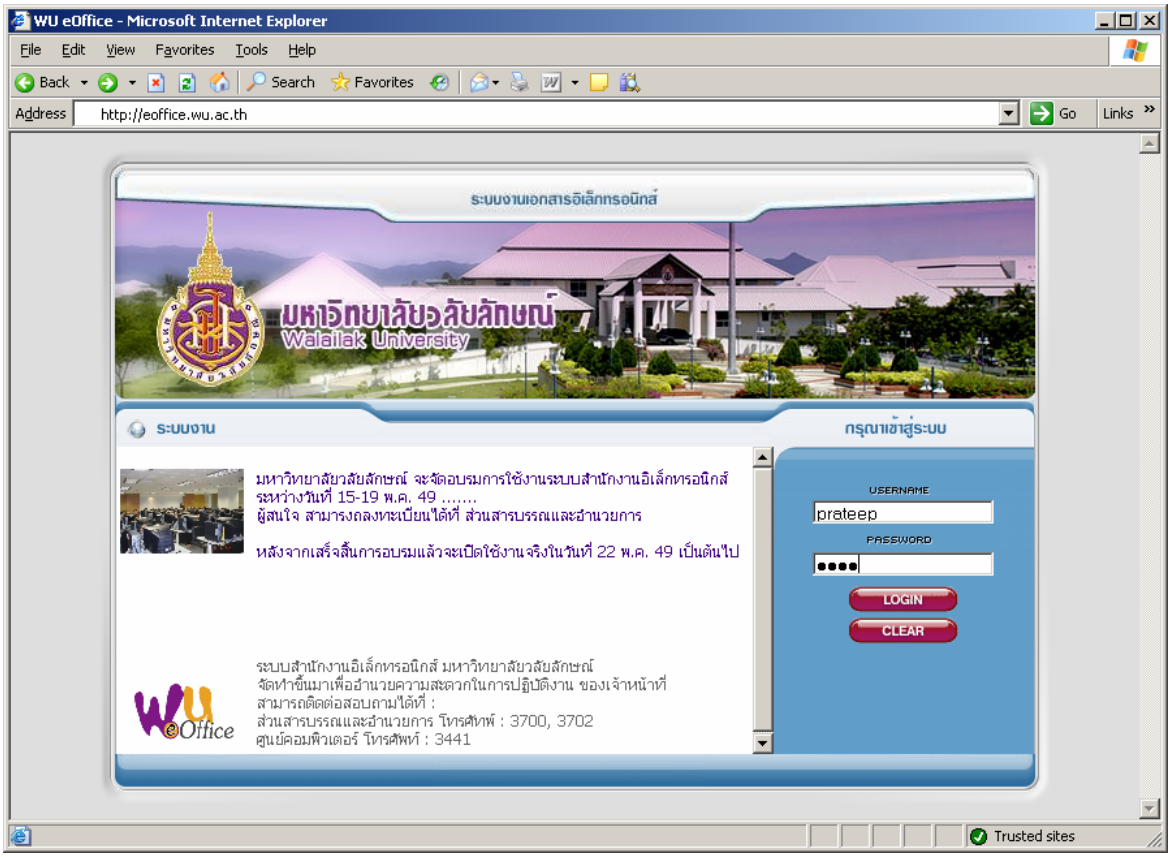
Log in to E-Office System

Using Microsoft Windows, selecting Internet Explorer which might appear as an icon on your desktop

After launching the browser, enter the URL below

URL: **http://eoffice.wu.ac.th**



Log in

You will see the system log in page. Type in your user name and password, then press Login. The system will verify your access right and display subsystem of the **"E-Office System"**

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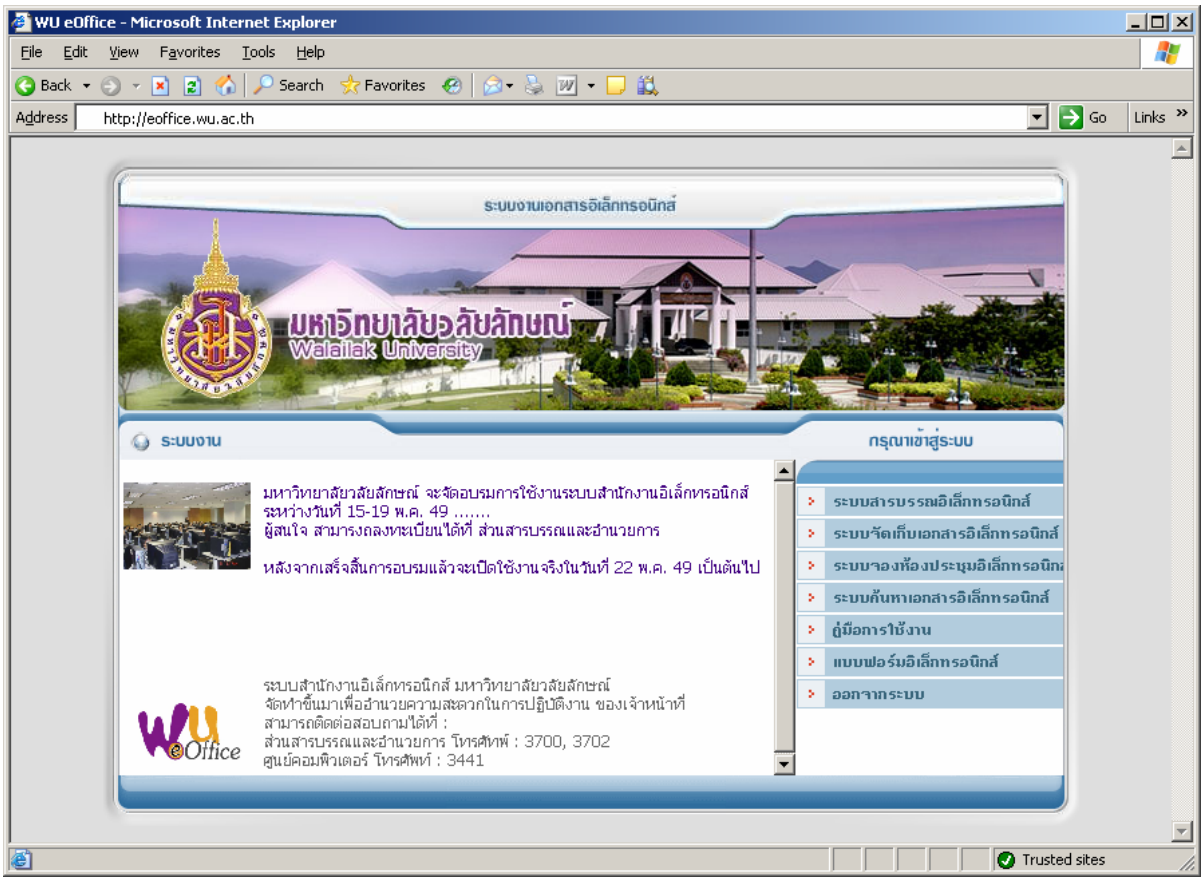
The sub systems include:-

1. Electronic Workflow System
2. Electronic Document System
3. Electronic Document Search Engine
4. Reservation System
5. Manuals
6. Electronic Forms
7. Logout



E-Office Main Page

Note After finishing any sub systems, please <u>press Logout</u> to log out from the E-Office system and come to the welcome page. Where you'll see the Login area. You may then close this window.

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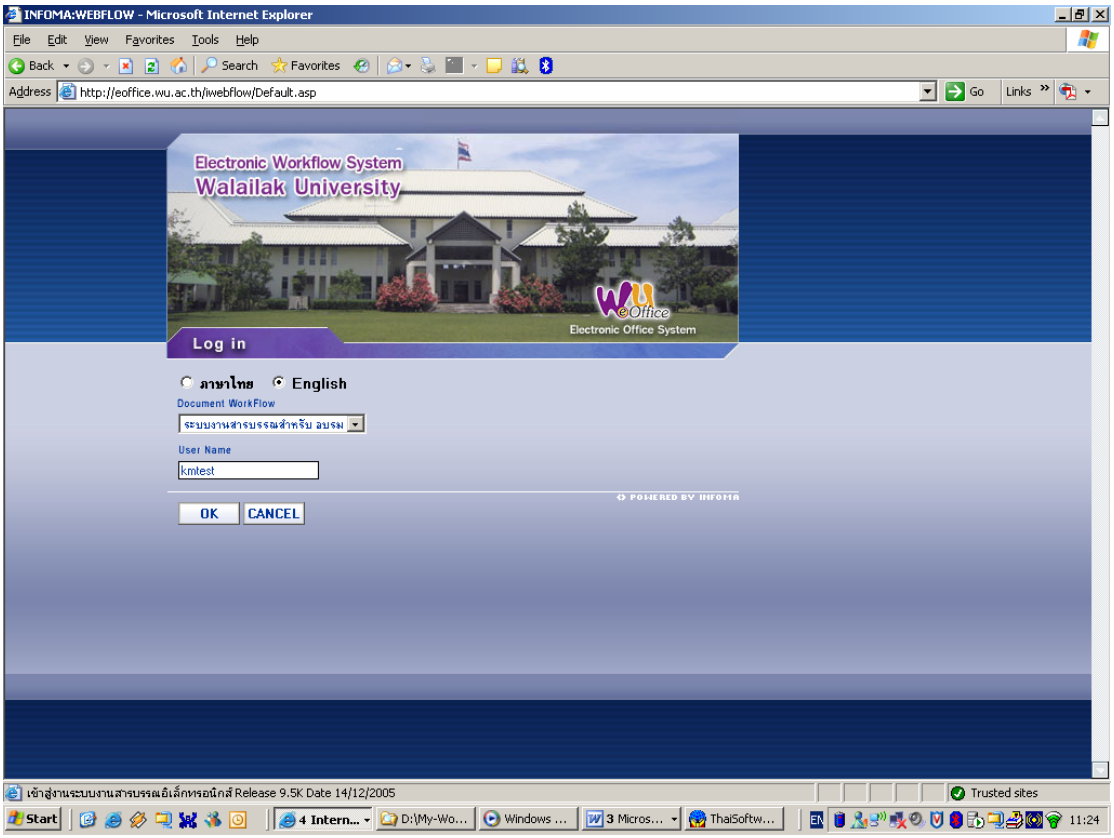
Log in to Electronic Workflow System

If you want to work in the Electronic Workflow system, after logged in, the system will verify your access right. You can then select Electronic Workflow System menu where you'll see this Electronic Workflow System Login page. Select the database you want to work with. You need not to provide user name and password again since you are already granted access from E-Office system. Please notify that the system has already put your name in the login area.



Log in to Electronic Workflow System

Select database then press OK to log in or Cancel and go back to E-Office page

Note in using Electronic Workflow System at Walailuk University, you can select language mode before log in to the system

- ⦿ ภาษาไทย For displaying menus in Thai
- ⦿ English For displaying menus in English

As for data, it will be as entered. For example, when registering in Thai, the data will be Thai, only if you want to use Thai data with English menu, you can do so.

You cannot change language after you enter the system. If you want to do so, you'll have to log out to come to this screen and select the language, the database and press log in again

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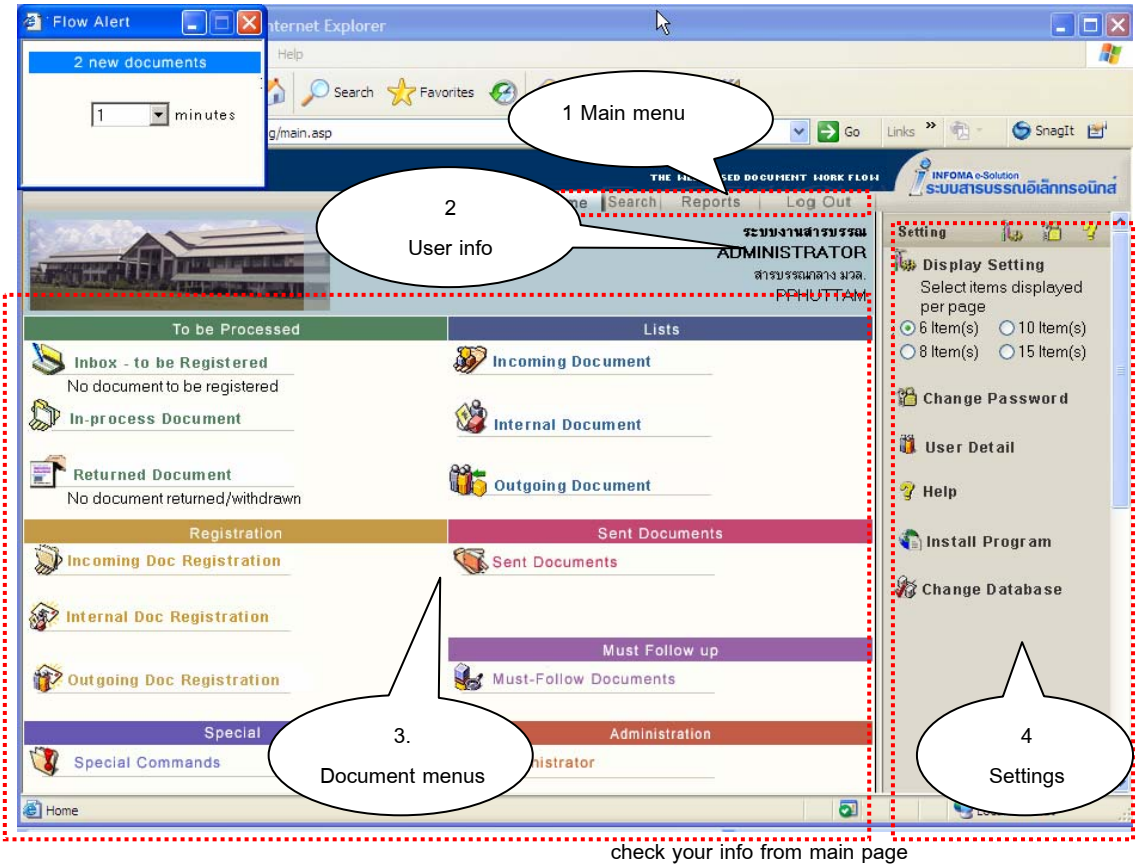
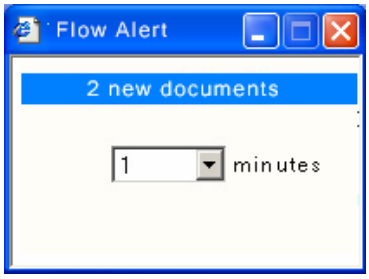
Introduction

After logged in, the system will check your access right (e.g., standard, read-only) and security level access, including searching rights to confidential document. The system then display main menu with your name and department to which you are in. You can check your information from section 2 in the illustration



check your info from main page

New Documents Alert



Once entered, the system will launch **new document alert system** called Flow Alert appeared on the top left corner. It displays new incoming documents that have never been registered (see number of document from blue tab). You can select timing for alerting.

Setting document alert timing

You can set document alert timing by selecting timing from the dropdown list as 1 minute, 3 minutes, 5 minutes or stop. If you want to close the window but want to continue the alert, you can minimize the window from the minimize button ▁ or you can close the alert with the close button ✕ This will not effect your document working routine

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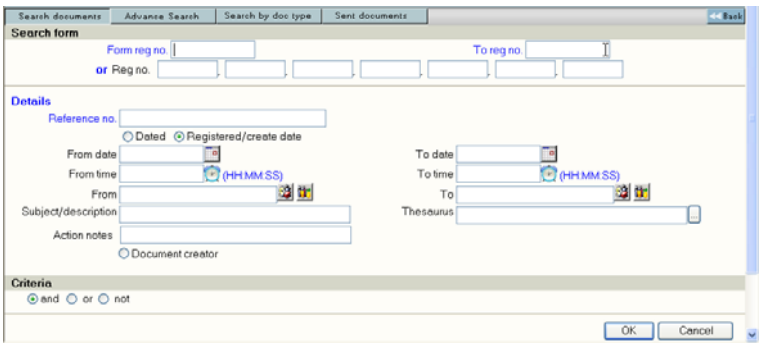
Note If you close the FlowAlert with the ☒ then want it back, just press Refresh (F5) or press "Home" menu

System Elements

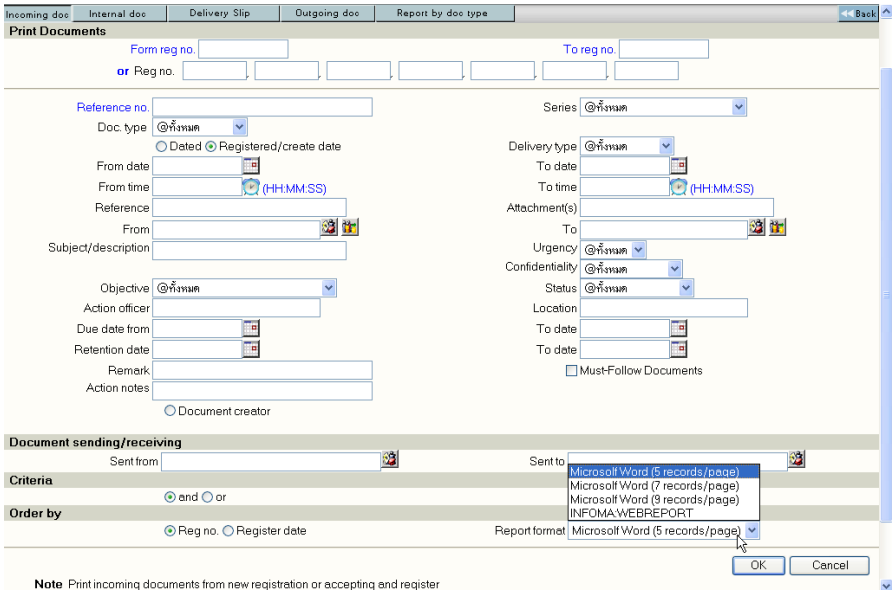
Home page is the first page appeared after entering the system. The homepage is divided into 4 main sections.

section 1. Main menu consists of main menus of the system. Remaining in the same position on every page, main menu consists of :-

- **Home** Select when you want to come back to the home page
- **Search** Select to search documents within your department
- **Report** Select to print reports
- **Logout** Select to log out and go to the log in screen



Search



Report

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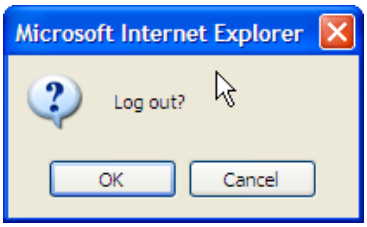
Log out



Section 2. User info inform user name, department to which he/she is in

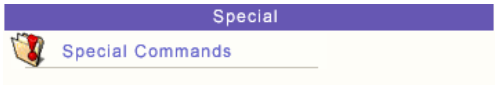
Section 3. Document menus consists of 7 menu groups

To be processed consists of

- Inbox – to be registered consists of new incoming documents or registered documents you sent and returned
- In-process consists of documents during process
- Returned document consists of rejected or withdrawn documents

Registration

- Incoming doc registration is for registering incoming documents
- Incoming doc registration is for issuing internal memo reference number for communicating within your organization (signed by supervisor)
- Outgoing doc registration is for issuing organization's outgoing correspondence reference no (signed by executive)

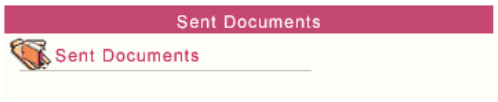


Special

- Special commands is for batch closing, sending documents or reporting statistics, KPI and thesaurus control

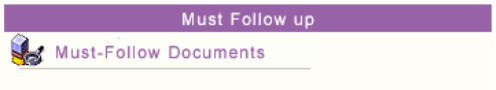
Lists

- Incoming documents are registered incoming documents that are registered from Registration menu or from Inbox
- Internal documents are issued memos for internal communication or outgoing documents signed by supervisor
- Outgoing documents are issued organization's correspondences



Sent documents

- Sent documents are documents sent to other departments. You can withdraw documents here.



Must Follow up

- Must-Follow documents are documents of all status (in process, closed, sent) that are selected as 'Follow up'

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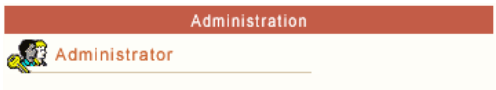
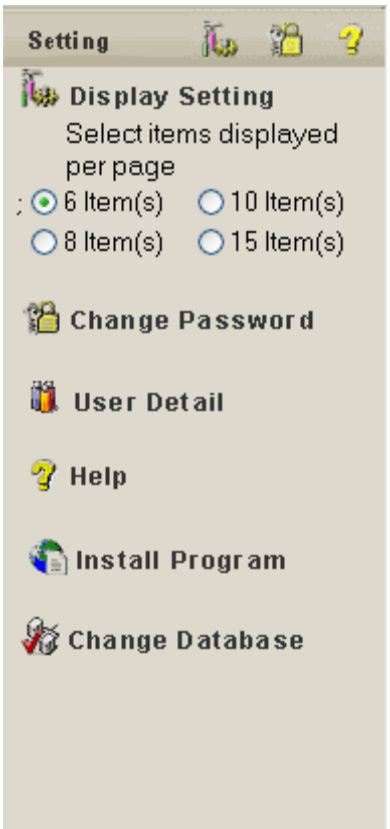


Administration

Administrator is a menu for controlling users, department or configuration for first use

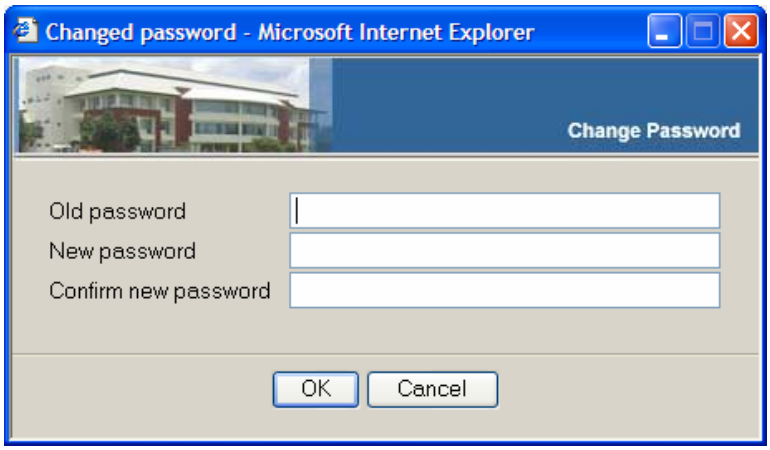
Section 4. Setting

You can adjust personal setting per use, explore tools or changing working department / database. This facilitates you as a Single Log in.

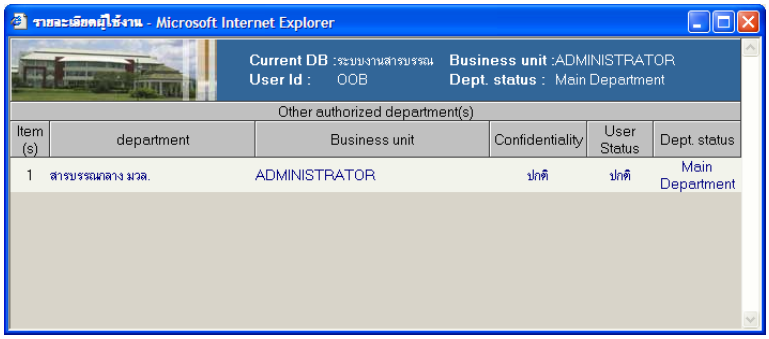


Display setting is for adjusting display items per page. Select preferred amount then continue to use the system as usual

Change Password is for changing your password



User details displays your information as a user: name-surname, department, access rights and level and other granted department(s) you are authorized to work for



Help displays manual

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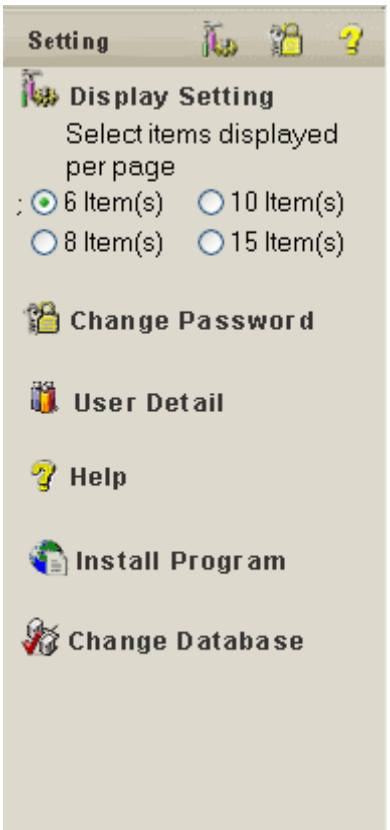
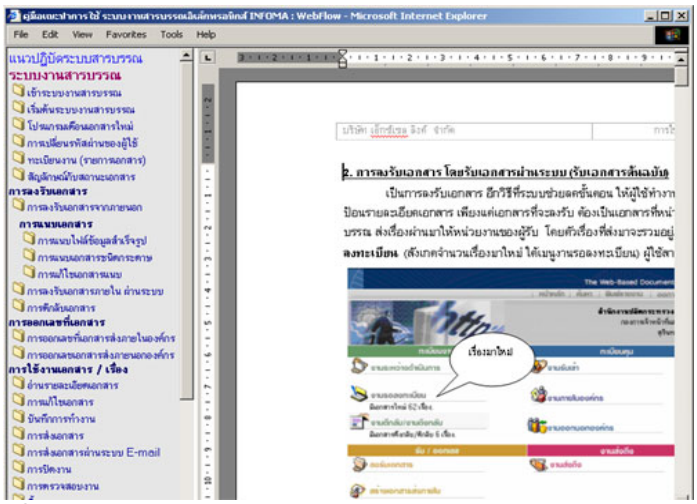
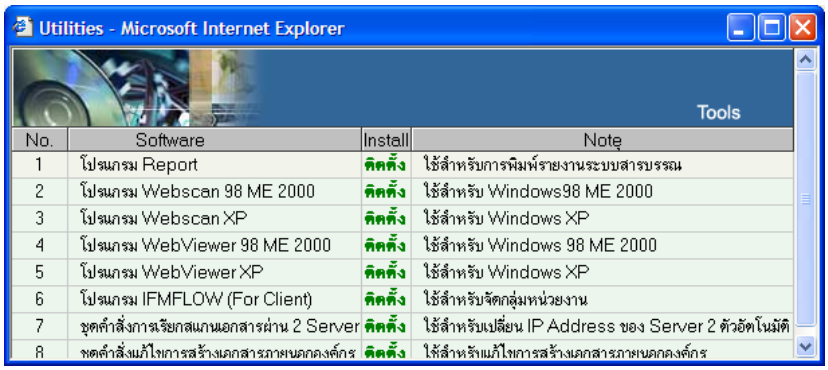
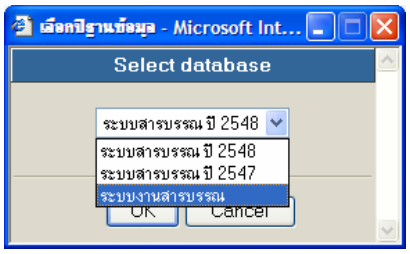




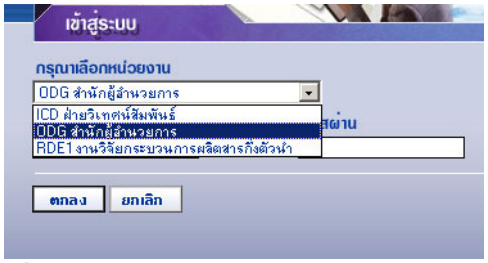
Install program is for downloading plug-in e.g. WebReport, WebScan, WebViewer



Change database is for changing document database without having to log out from the system



Change department is for changing working department you are authorized within the same document database



Main department is for coming back to work with your default department (first department you see after log in)

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Note

Change Department and Main Department will be displayed if you are working for more than 1 department

Menus

To be Processed

To be Processed consists of 3 sub-menus

Inbox-to be Registered displays documents sent from other department. For example, the central registry register incoming documents and send (forward) the documents to you. The system will display these unregistered documents. Since unregistered, the Reg. no. column will display **paper icon** for you to click and register or reject and send back to the sender. If the document you registered was sent and sent back to you, the same Reg. no. you registered will be displayed. Unviewed document will be displayed as **closed folder**

Inbox- to be Registered

Note paper icon refers to unregistered document

"blue" the sender will send paper document

"orange" the sender won't send paper document, so you can register and proceed

Icon means that the document has not been read (click to view details)

in red means the document has exceed due date and has not been read

Icon means the document has been read (click to view details)

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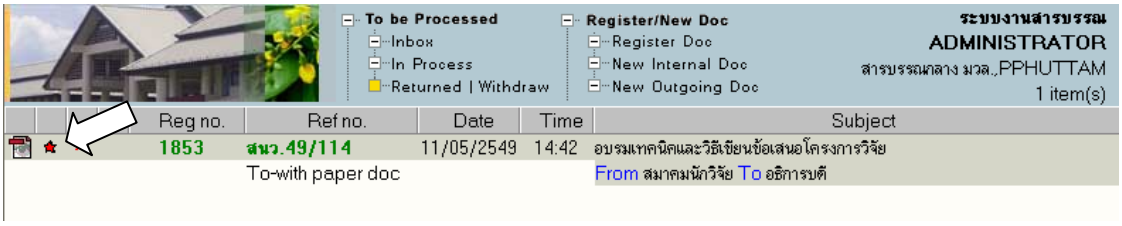
In-process Document displays registered incoming documents or issued internal memos that have not been sent or closed. The system displays the document status 'In-process' as **a clock**

In-process Document

Returned Document displays unusual documents that are rejected by the recipient or withdrawn by your department. The system display these rejected/withdrawn document status as **red star**



Returned Document

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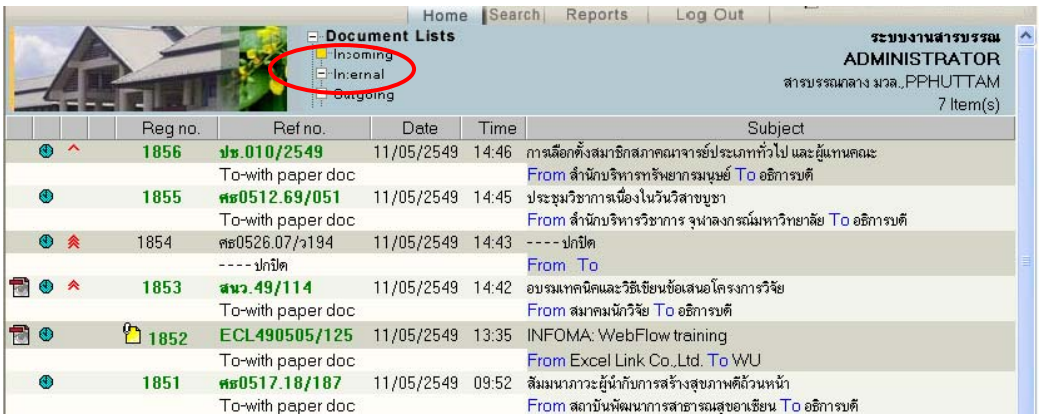
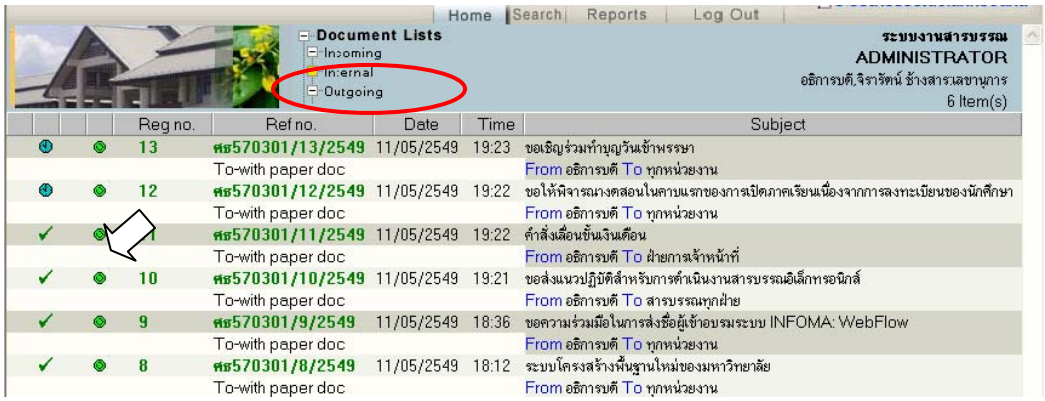
Lists

Consist of 3 sub-menus, each displays documents of its type : incoming document, internal documents, outgoing documents

The system displays documents of all status in each type. You can be notified in which menu you are in by the image map above as illustrated

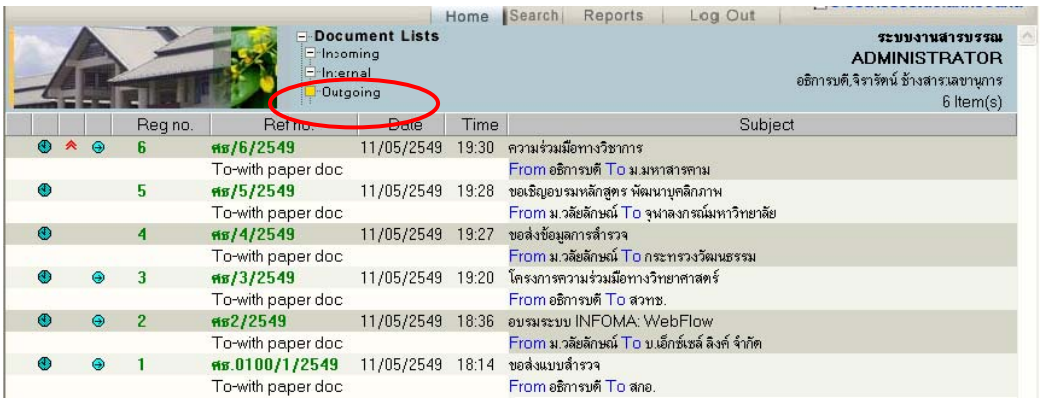


Incoming doc of all status (in process, sent, closed, inspected, etc.)



Internal doc of all status (in process, sent, closed, inspected, ect.)

Please notify the internal document type icon



Outgoing doc (no sent needed) Please notify the outgoing document type icon

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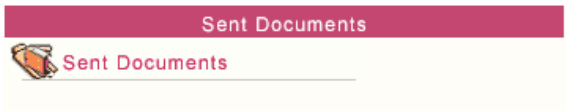
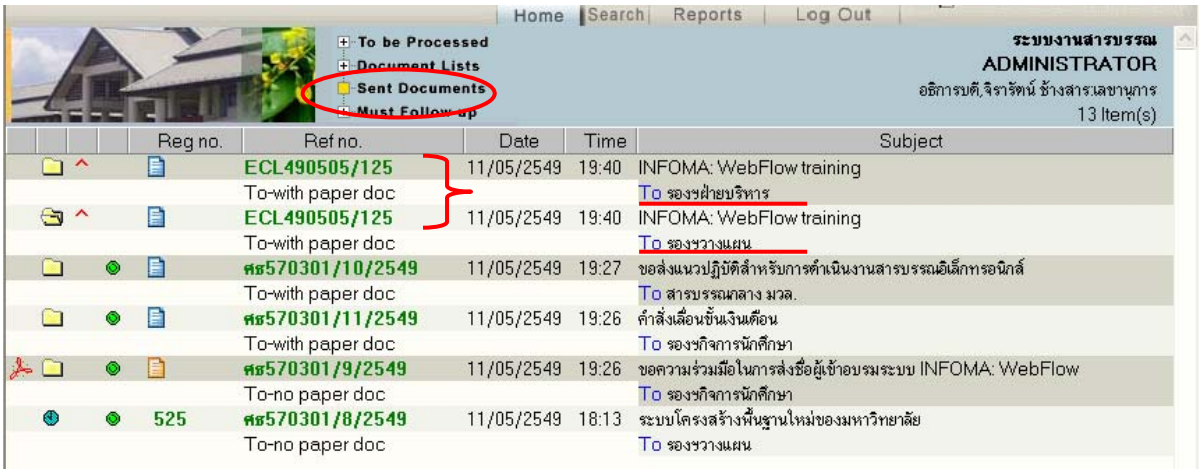
Sent document



Displays documents of all type (incoming internal outgoing) that you sent to other departments. You can withdraw documents sent to wrong recipient from here. Please note that the document status and registration no. in this menu belongs to the recipients. If one document is sent to many recipients, the system will display documents of all recipients.

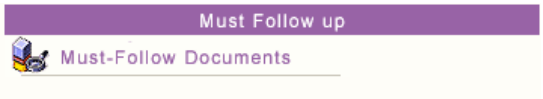


Sent documents displays sent documents of all recipients with their (the recipient) reg no. and status

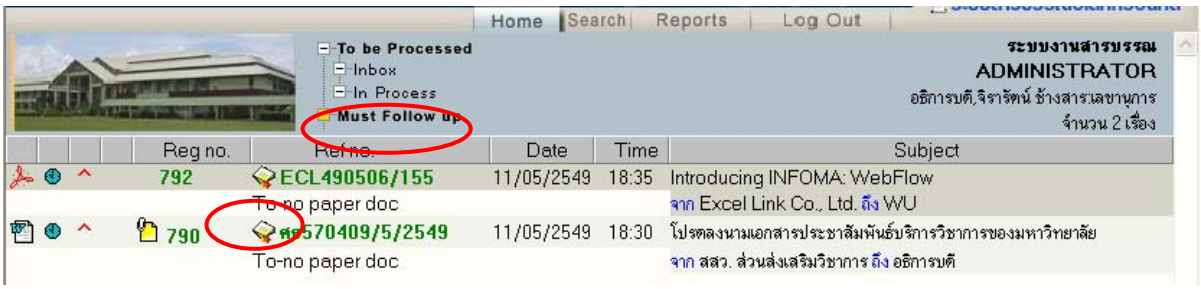
Sent items are of all document type. Please notify the internal and outgoing icon

incoming document has no icon

Must Follow up



Displays documents of all status that are selected "Follow up" from Edit, Make notes and Send menus. Must-follow documents has icon as illustrated



Must Follow up displays documents of all status that are selected as "Follow up"

Note Documents in all menus above are sorted by recent date by default. You can sort documents by other data by clicking the column to sort data by selected column. Please notify the **triangle** as sorted by

Upside triangle is sorting ascending ▲

Upside-down triangle is sorting descending ▼

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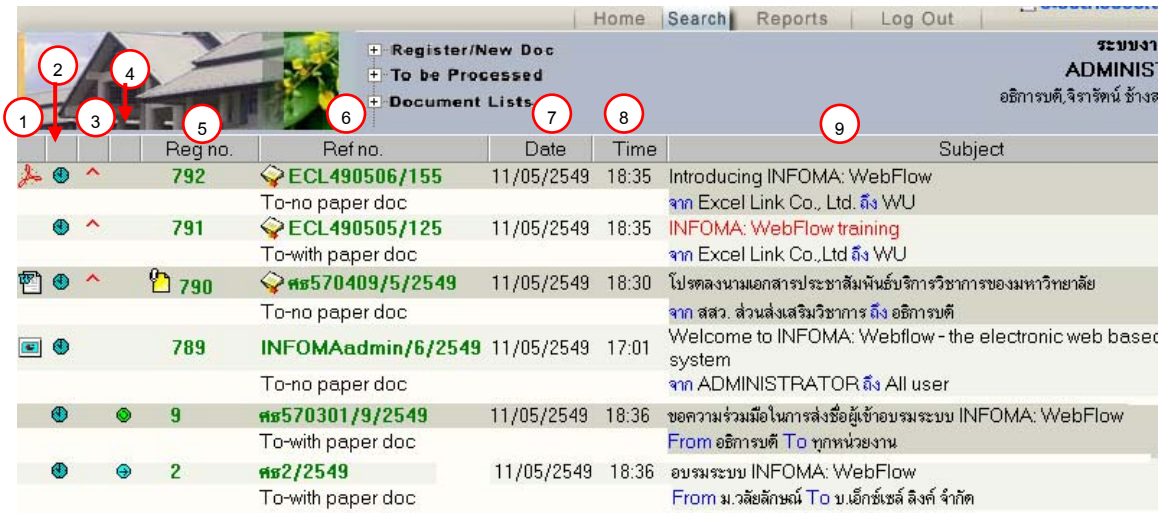
Search result display

All document menus above and search result display documents in the same format. Search result displays documents from search criteria. If no document type (incoming, internal, outgoing) is selected, the result will display documents of all type. Please notify that this screen is search mode from the search menu.

Document information in document menus

Document display format consists of 9 columns



1 **Attachment** display icon subjected to file type If more attachments are available, the additional attachment icon will appear at the reg. no. column. You must press reg. no. to view these attachments

2 **Document status**

(yellow) the document has not been read (click to view)

(red) the document has exceed overdue date and has not been read

the document has been read (click to view)

(blue) in-process registered incoming doc/issued internal doc that has not been closed or sent

(red) overdue in-process registered incoming doc/issued internal doc that has not been closed or sent

closed document

sent document

void/cancel document

during inspection document

rejected/withdrawn document

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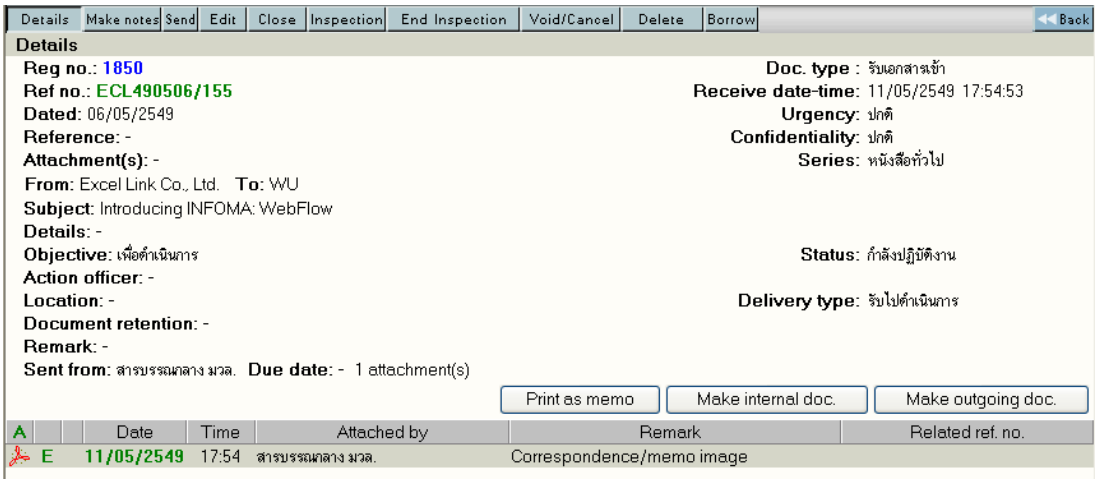
3 **Urgency status**

n/a	normal
^	urgent
^^	very urgent
^^^	most urgent

4 **Document type**

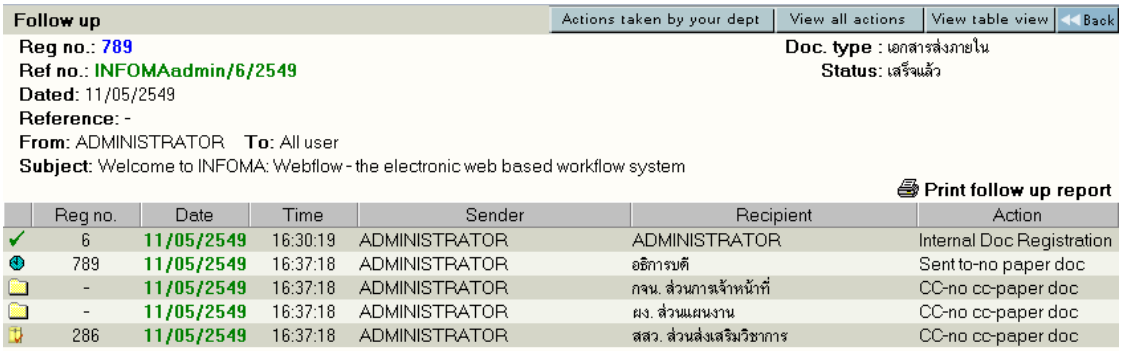
n/a	incoming document
	internal document
	outgoing document

5 **Reg no.** displays registration number. If the document has not been registered, the system will display registration number as or You can press here to do document work, e.g. view details, make notes, send, close, inspect, end inspection, delete, void/cancel, file, borrow document



When pressing reg. no./paper icon, the system displays document menus

6 **Ref no.** you can press here to track working process, including view notes made by recipients



7 **Date** displays register/issue date (in case of creator) or sent date (in case of recipient)

8 **Time** displays register/issue time (in case of creator) or sent date (in case of recipient)

9 **Subject** displays subject of documents and sender-addressee as printed on the correspondences

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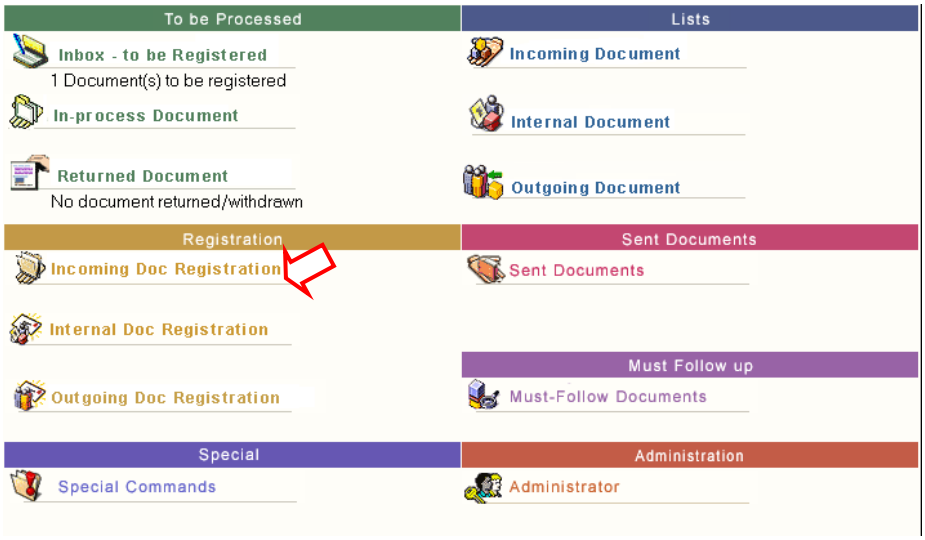
Document Registration

When internal organization or incoming documents from others are sent to you, registration can be done in 2 ways

1. Register documents by inputting data yourself (Incoming document registration menu)
2. Accepting documents sent to you from Inbox (To be Processed menu)

1. Register documents by inputting data yourself

If you are central registry or receive documents from other organizations directly b hand or FAX, or receiving document from internal departments that do not have Electronic Workflow system to send to your inbox, you must register documents yourself.



You can register documents from Home | Incoming document registration or selecting the menu from image map from other pages on the blue banner on the top (the area displayed your info on home page). The system will provide registration form to fill in for reference or searching.

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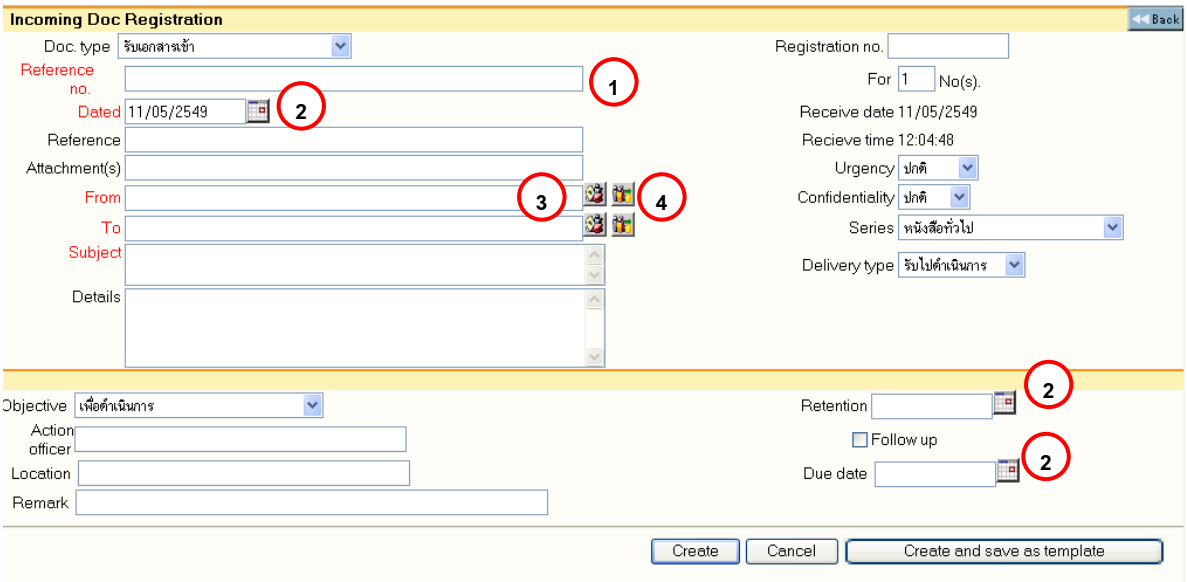

Incoming document registration

Provide document index

Doc type Select document type from the dropdown list in case you register incoming document by different list

Registration no. Leave black if you want the system to assign the registration no. automatically or provide registration no. prior to latest registration no. The system will not assign registration no. *Use this in case you need to reverse / insert registration number only*

> **Note** in case you need to insert registration no., the number must not duplicate with existing registration no. and the inserted number must be in between existing number in 2 digit-decimal format.

Reference no. Reference no. as appeared on the correspondence. You can type up t0 50 characters. If you'd created and save the document information as template, you'll see button from which you'll be able to choose document information inputted from list of subject

For Provide number of registration number desired

Date/Time Date and time registered

Dated (2) Provide date of document as dated on the correspondence. The system provide current date by default, you can change the date or select a date from the calendar from the button

Urgency If you want to control urgency, select urgency level from the list

Normal	urgent
Very urgent	most urgent

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Confidentiality : if the document is classified, select confidentiality level from the lsit

Normal	Classified	
confidential	very confidential	highly confidential

Series : select document series. If not selected, the system will classify as “general”

Reference : provide reference number on the reference line. It can be up to 100 characters

Attachment : provide attachment information. It can be up to 100 characters

From : provide sender’s name. It can be up to 100 characters. Alternatively, select name from your contact list from

- 3 right to From box if the sender is internal department from INFOMA: WebFlow system. You can search for department’s name or press search to display all departments in the system
- 4 right to the From box if the sender is from other organization and that you ‘d already create a contact list from administration menu. You can search or press search to display all contact list available

To : provide address’s name. It can be up to 100 characters. You can type in or select name from or like you did in From box

Subject : provide subject of correspondence. It can be up to 255 characters

Details : provide summary or brief information. It can be up to 2 million characters

Delivery type : select delivery type from the list

Objective : select objective from the list

Action officer : provide action officer responsible

Retention : assign retention by typing in the date or select a date from the calendar like you did in the dated box

Follow up : mark this if you wish to put it in the Must-Follow up menu on home page

Location : provide location which the document will be stored for tracking of original

Due date : provide due date where you need the work to be done by

Note : provide any other information

Provide document information as available. If no information of such box is not known, just leave blank except for the information in the box in red which must be provided. Example…

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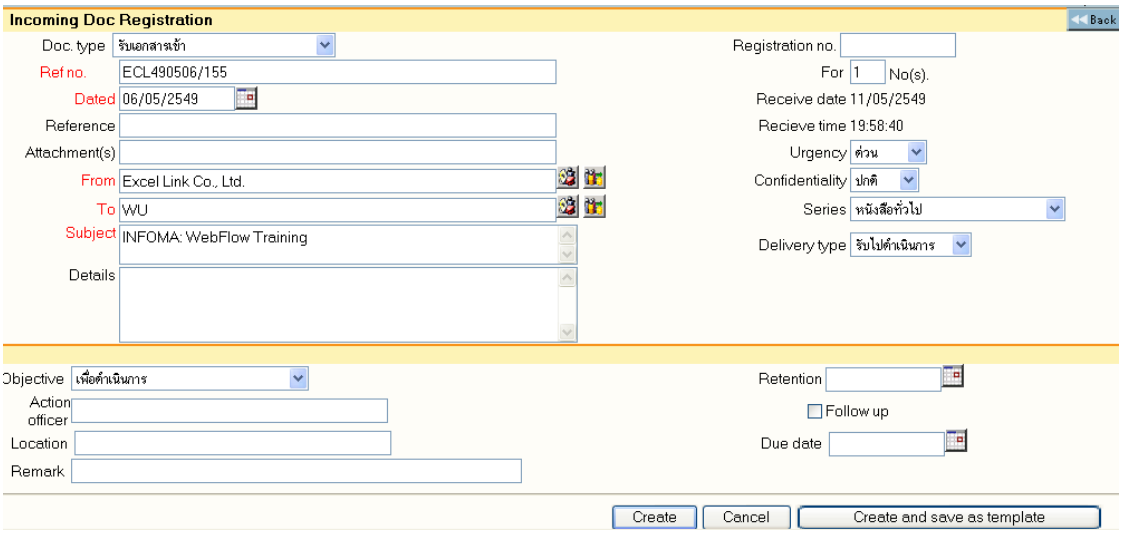


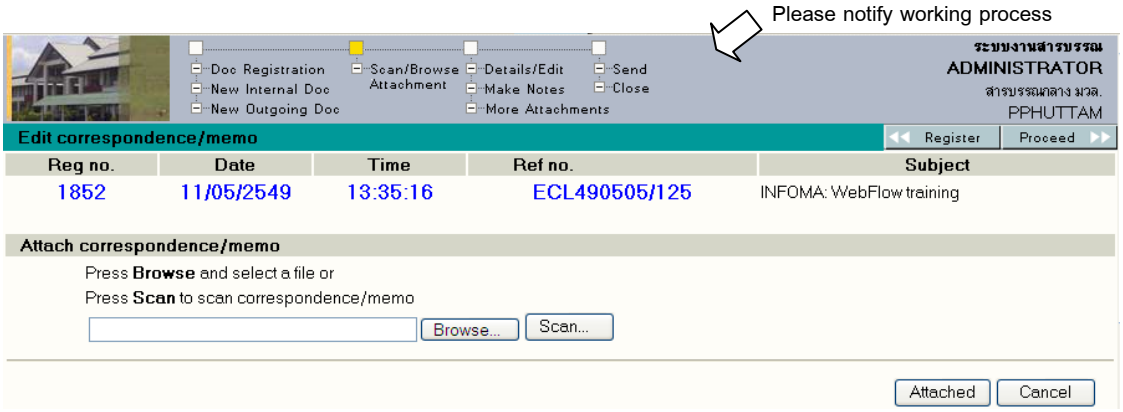
Document index

When done, press button below in different case

Meaning of buttons

- press Create to register
- press Cancel to clear the form
- press Create and save as template to register and save what you typed in to a template where you can call up to use later from document template

When created/create and save as template, the system will assign registration number as illustrated. You can select to attach correspondence image here or not.



When registered

Attach image there are 2 ways of attaching image

1. attaching existing file, press **Browse**
2. attaching by scanning press **Scan**

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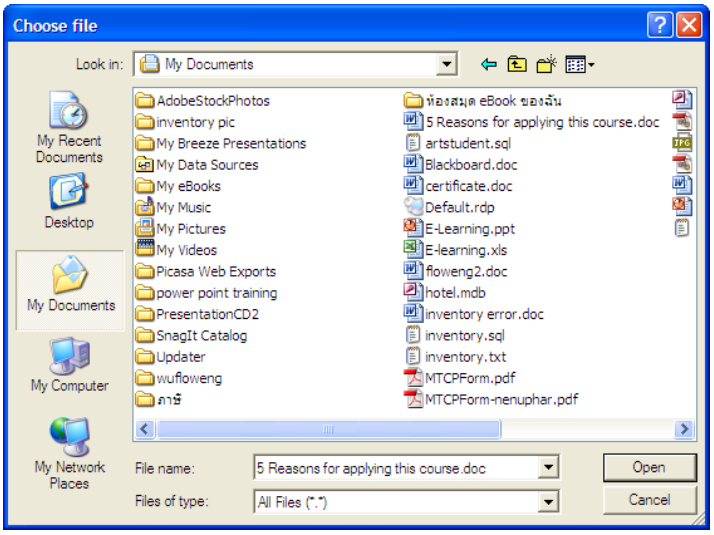
No attachment you then have 2 options here

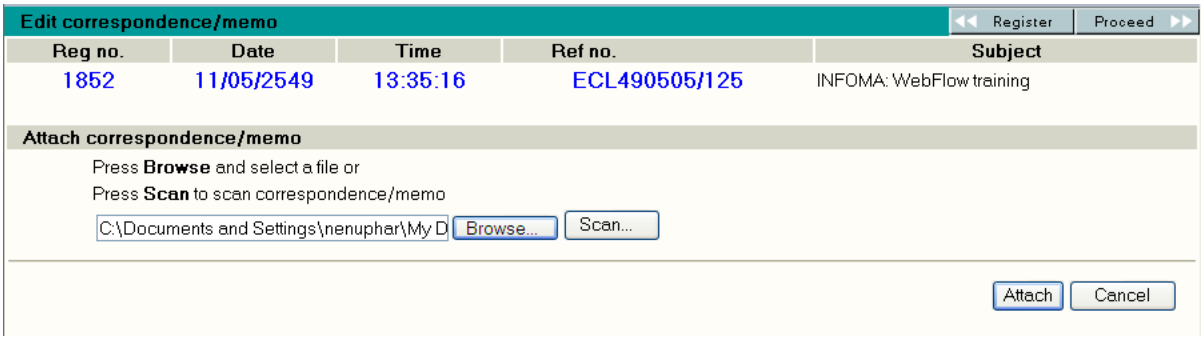
1. press **<< Register** to go to new blank registration screen to register next document
2. press **Proceed >>** to go to document menus for editing, make notes or send

Adding Attachment

1. **Attach existing file with Browse**



Press Browse. The system displays a window to choose a file. Choose file from its' location, then press Open



Press **Attach** to attach the file

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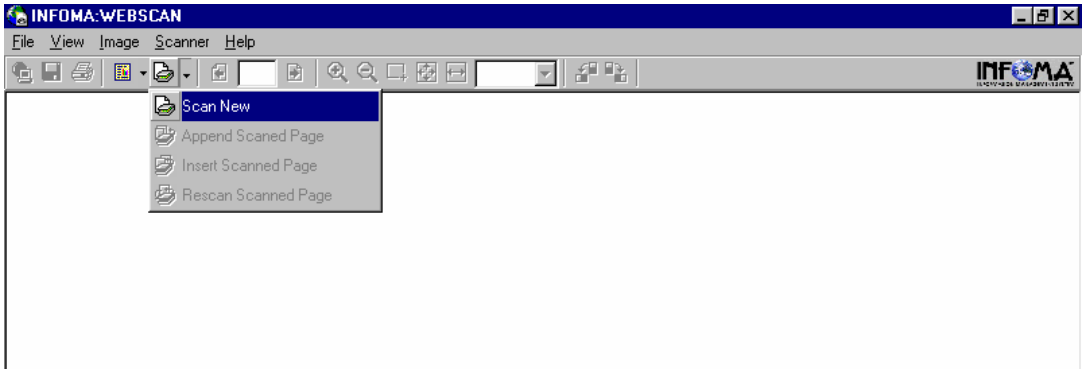
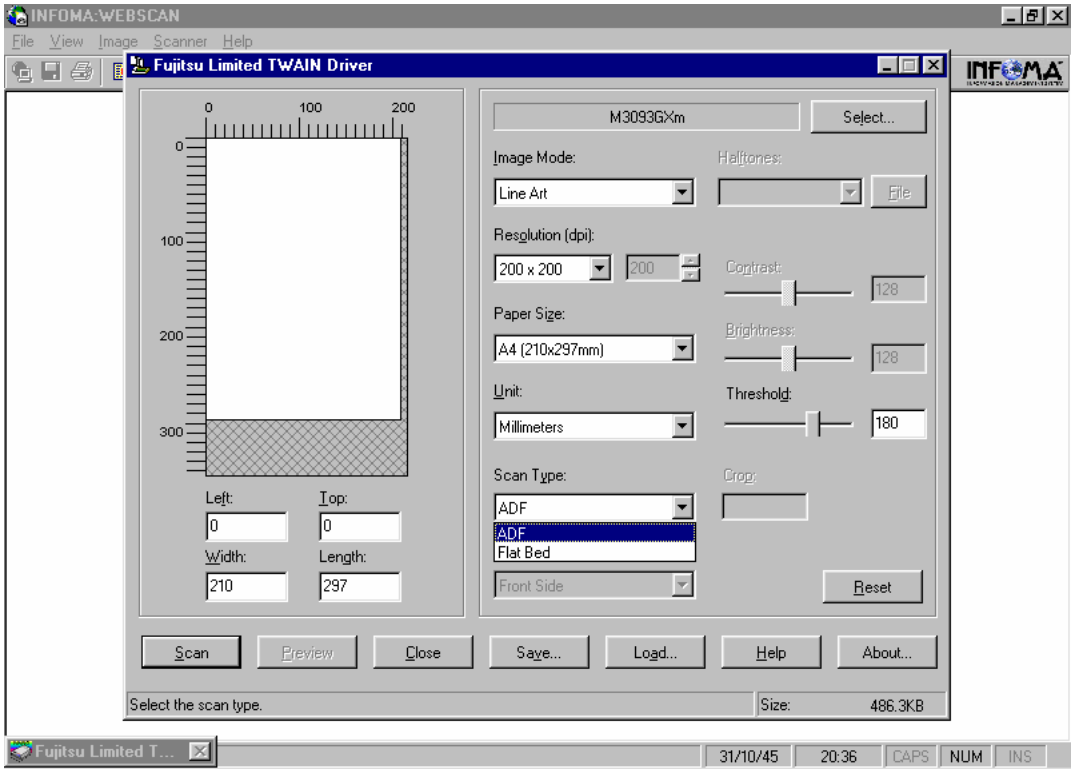
2. **Attach by scanning**

Press scan, the system will launch INFOMA:WebScan (you must install this program firs). Then press **Scan New**



The system launch a window for adjusting scanning option



Set resolution, paper size, and mode (grayscale, text, colour) then press **Scan**

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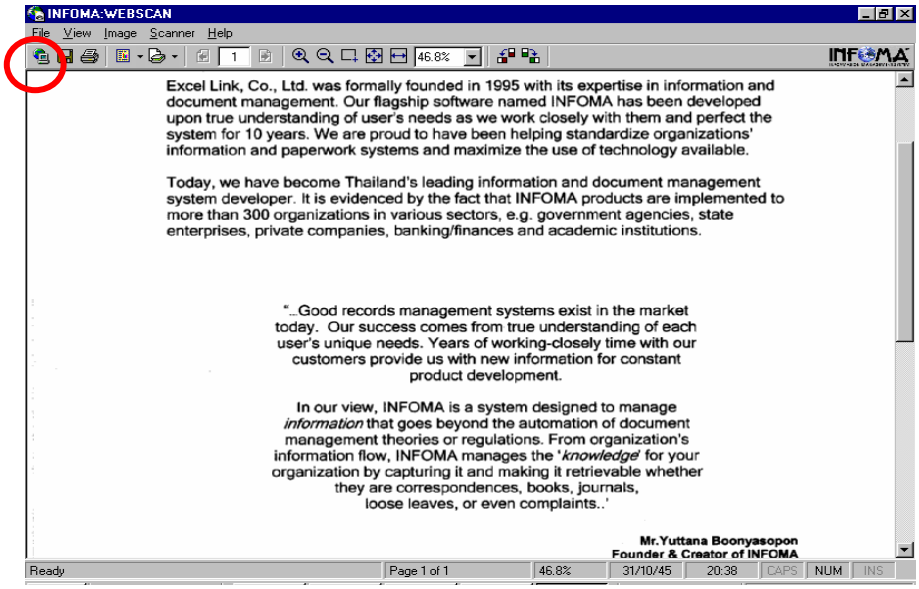

When done press **Transfer**

> **Note** in scanning process, the screen may appear differently subjected to the make of the scanner. In this manual, we use Fujitsu M3093GX scanner as an example. Other scanner may have different scanning option screen subjected to its driver.

Attention!

Most documents are in black & white so it is recommended that you choose mode B&W (Text) to save storage space. Other scanning option may be varied depending on model of the scanner.

Scanning Type may be of these options

- Flatbed scan is scanning by opening the scanner's cover and place the document face down manually
- ADF scan is auto feed scanning for multiple page documents
- ADF & Duplex scan is auto feed scanning for 2 sided documents

Resolution It is recommended to set at minimum at 200 x 200 dpi, however, it depends on the quality of the document. You may set the resolution higher

Frame Area is the area chosen to scan, normally it is set at size A4 document

Press Scan to scan. If there are more pages you can choose scanning option below

- Appended Scanned Page is to scan next document as last page
- Insert Scanned Page is to insert next document to be scanned to the current page
- Rescan Scanned Page is to scan the whole thing again, replacing what you did

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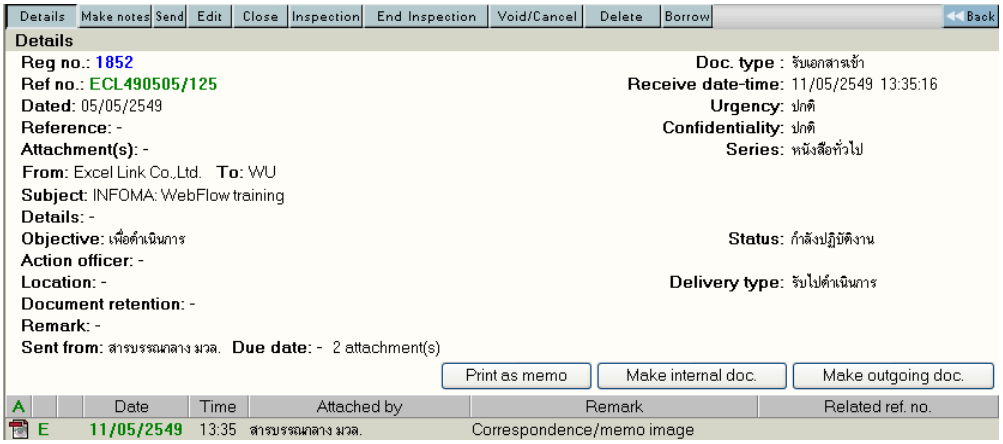
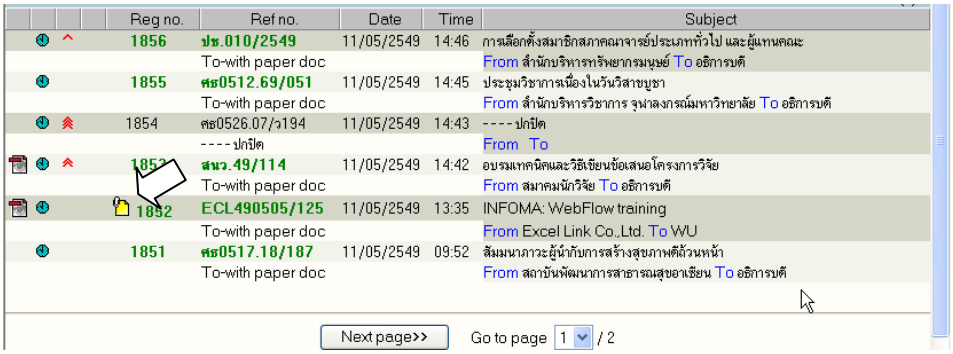
➢ Edit or Add more attachments

Each document can attach its' correspondence/memo image and add more attachments indefinitely. You can monitor the correspondence/memos image and its attachments when clicking the registration number to the document details page. Please notify the bottom of the page which displays all attachments

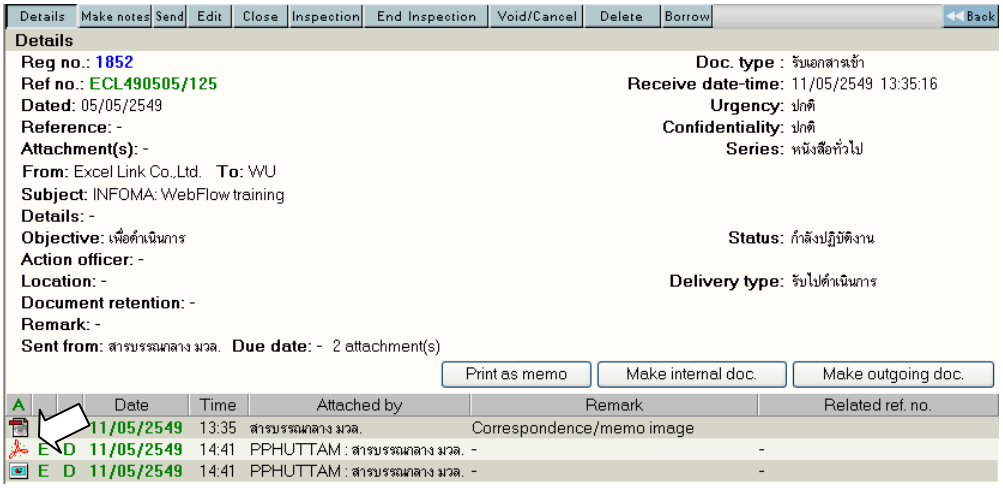


➢ Viewing correspondence/memo image and additional attachments

The document creator (sender) or the recipient in the system can view the correspondence/memo image from the icon in the first column. Additional attachments will be displayed its icon left to the reg. no. You can view these additional attachments (and the correspondence/memos image) when clicking the reg. no. and go to the document details page



View attachments



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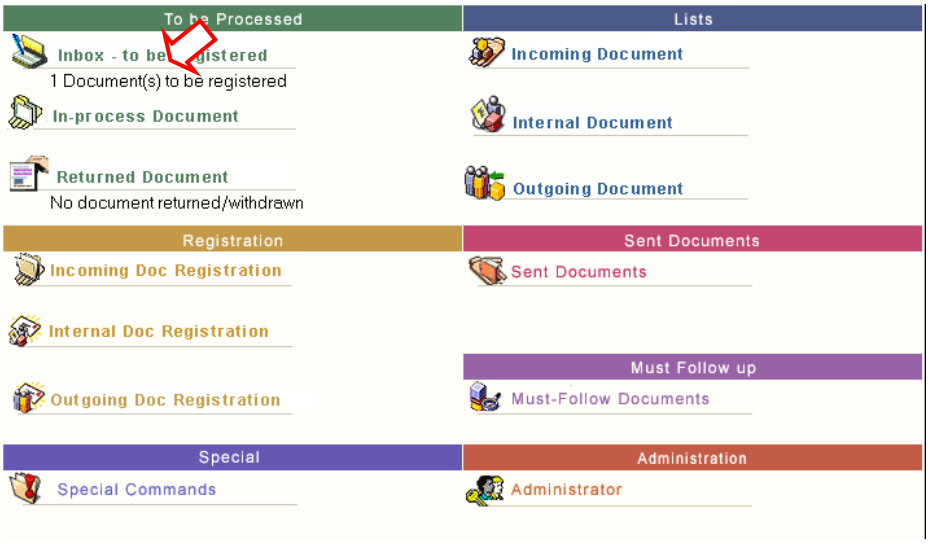
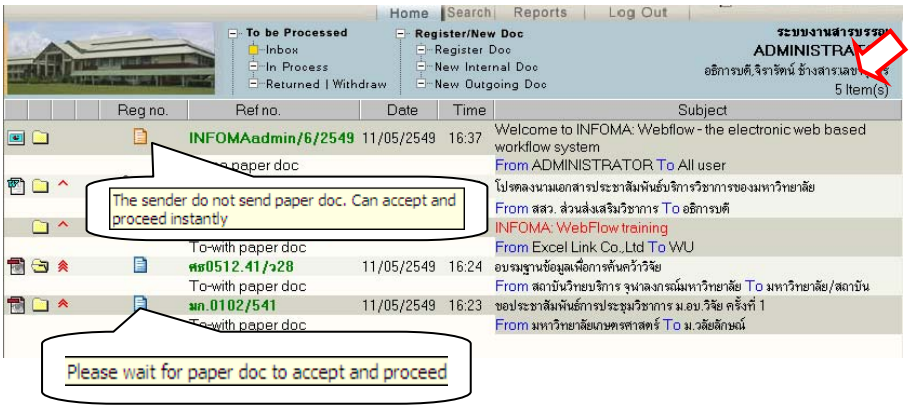
2. Registering document from Inbox

This is one way to reduce registration process for you, if you are not the first to receive the document in your organization. The first department who got it registers it from Registration menu and sends it to you to your Inbox. You can see number of documents sent to you from **Home > To-be Process menu**



Main Page

To enter the menu To-be Processed, you can go to Home page or alternatively select the menu from the image map on the blue banner above. You can find out the number of new incoming documents from the Home page. When entering the menu, the system displays incoming documents as illustrated



Total number of document in Inbox

Inbox displays incoming documents. Use tooltip to help using the system

When entering the menu, the system displays incoming documents waiting to be registered, the system then display unregistered icon which implies

"blue" to wait for the paper document. After receiving the paper, you can then register

"orange" the sender won't send the paper document, you can register at once. Details of document can be read from document details or attachments attached.

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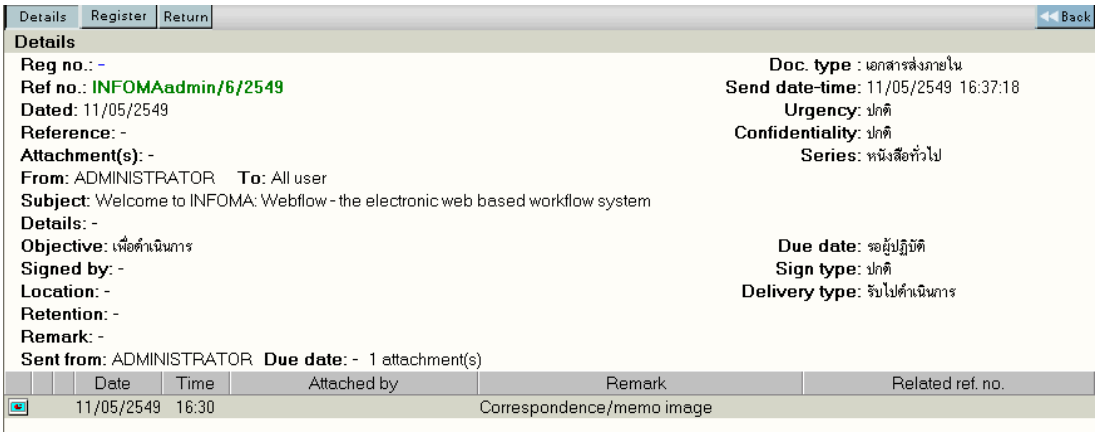
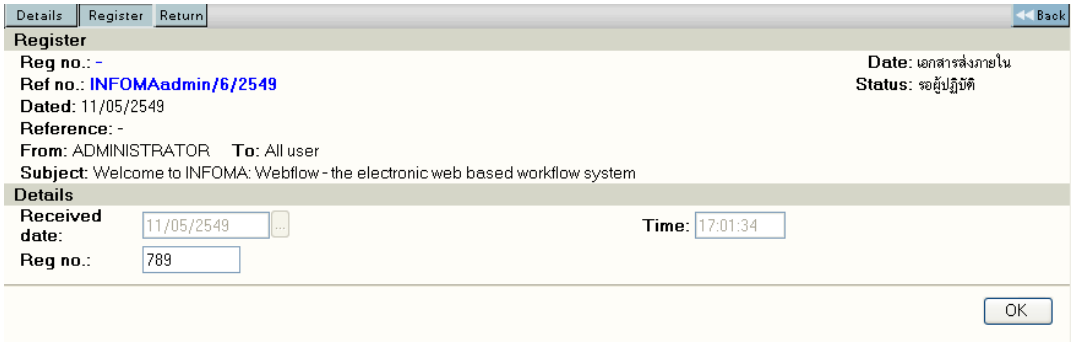
Here at the Inbox-to be Registered menu, you can view details or attachment or tracking the document work before registering. To register, press the paper icon.



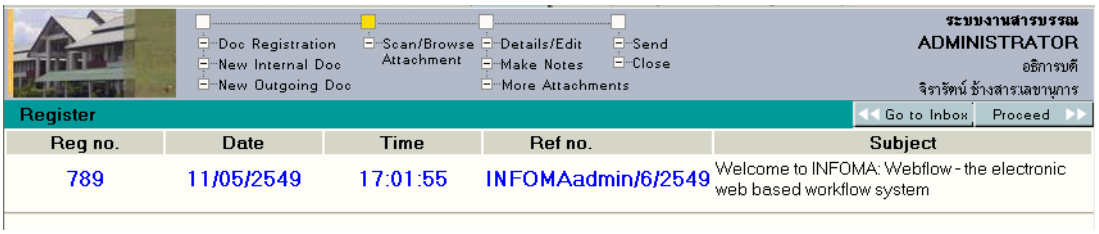
รายละเอียดเอกสาร

Press **Register** to accept the document or press **Back** to go back to Inbox if you don't want to register this document at the moment



Register incoming doc

When selecting Register, the system will preview registration date and time. You can alter registration number here if you need to reverse the registration number to the number prior to latest registration number. Provide number in 2 digit-decimal format. Otherwise the system will assign registration number automatically. Press OK, the system will show registration result as illustrated



Registration result

The system informs actual registration date and time. (You can then record this information on your department's receiving stamp) You can choose to continue to register incoming documents by clicking ◀◀ **Go to Inbox** to go back to inbox and select more documents to register or alternatively clicking

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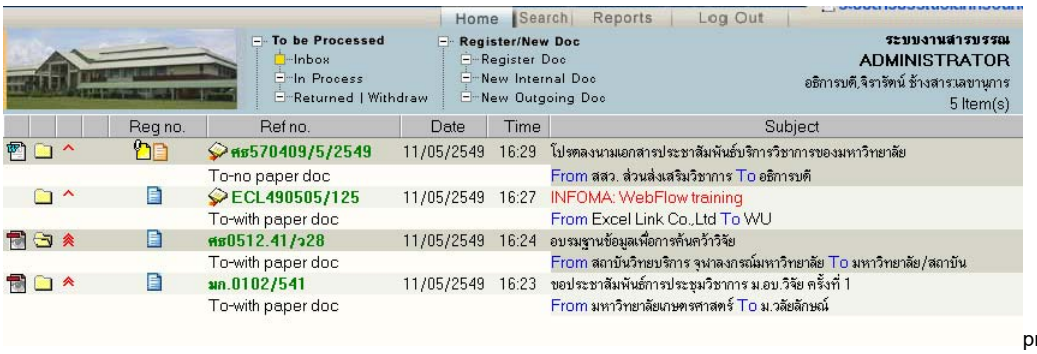
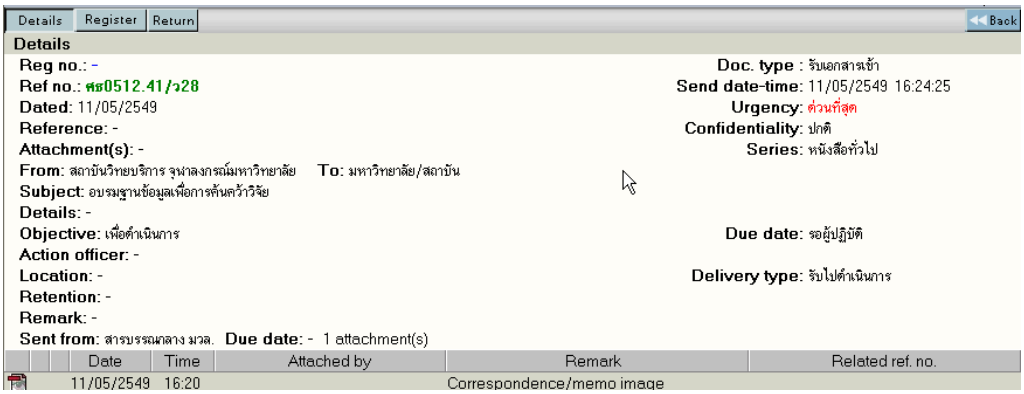
Proceed ▶▶ to go to document menus such as edit, sending, etc. You can alternatively choose to register other documents from the image map on the blue banner above

Return document

If you see documents that do not concern you in the **Inbox** that the sender might have mistaken sent you, you can return the document to the sender by pressing the **paper icon** and then press Return button

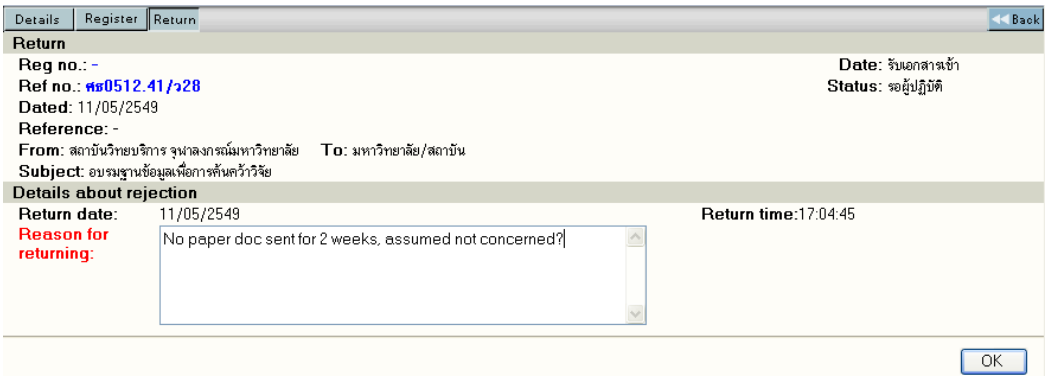


press the icon



Press Return

The system will display a box to input message implying reasons for returning the document to the sender. Then press **OK**



Returning document: State reason

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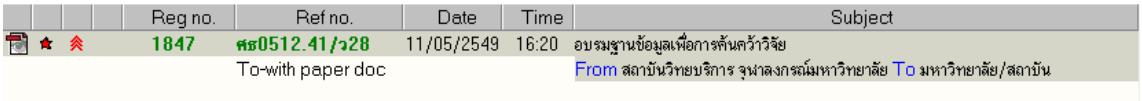
Tracking returned document at the sender's side

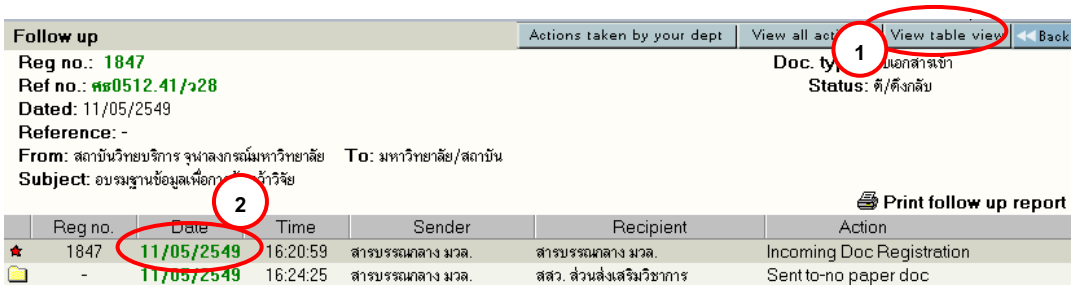
If you receive returned document, the Returned Document menu will notify you as illustrated

The system keeps track of the document root and reason which can be notified as follow

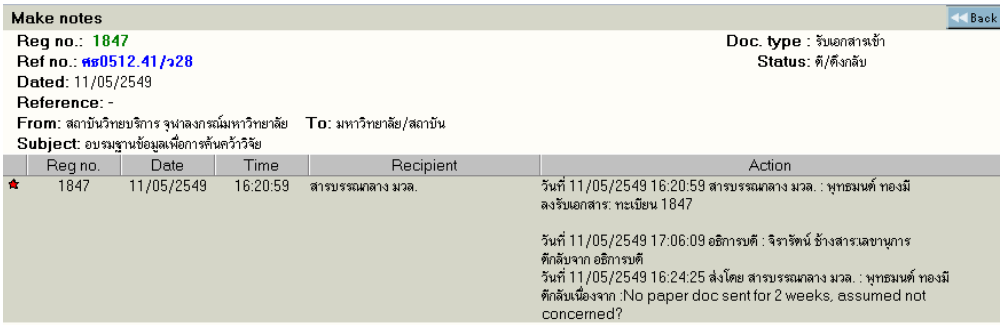


The sender's Returned Document screen

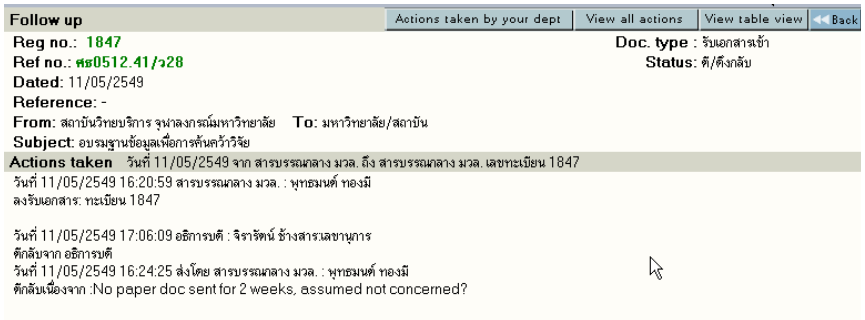
From the Returned Document menu, press at the reference number to track document. History can be viewed in 2 ways: View from table view and view from sending transaction from sending date



View table view



View sending transaction



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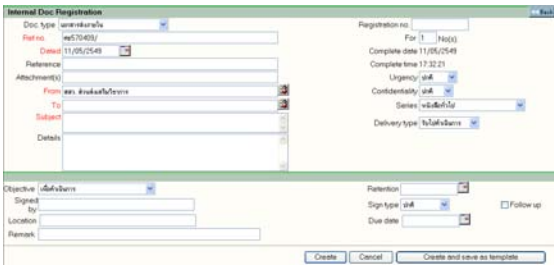
Internal Doc Registration

This is a process of issuing memos/correspondence reference number, signed by supervisor. To issue, following the instructions

1.Select Internal Doc Registration menu

2. Provide document index, press create



3. The system will issue the reference number automatically

4. Proceed to send to other departments or Register to issue more memos/correspondences

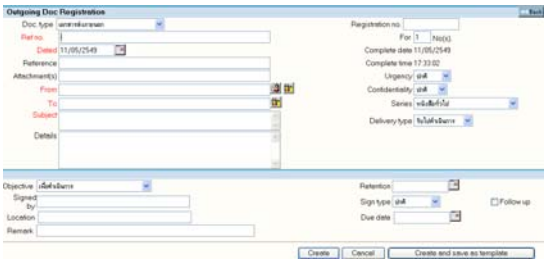
Note In case of issuing memos to send to non-INFOMA department(s), you can proceed, make notes (if any) and close right away

Outgoing Doc Registration

This is a process of issuing reference number for outgoing correspondences when contacting other organizations. Reference number will be issued for departments, continuously. You may face password protection. To do so, follow the instructions

1. Select Outgoing Doc Registration
2. Provide password

3. Provide document index



4. The system will assign reference number automatically

5. The system put the issued documents in the outgoing document list, no need to send.

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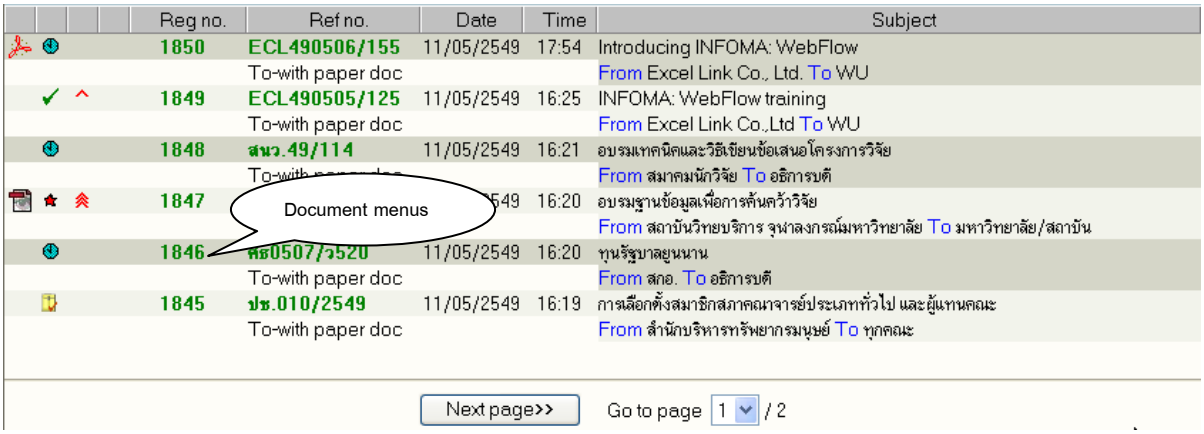
Document action menus

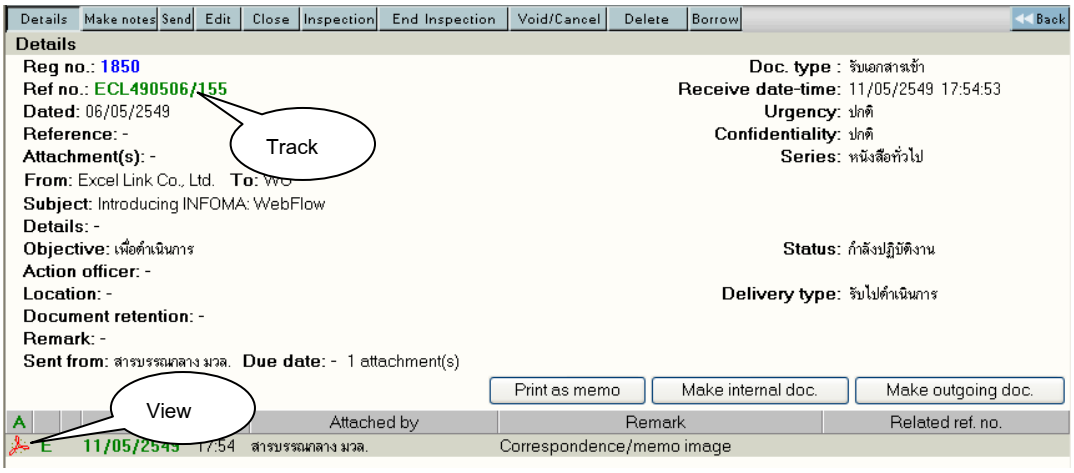
To process document work, you must go to documents display screens and reach registration number. There are many ways of reaching document display screens, which are normally reached in different occasion and use.

1. In- Process → press reg no. → Document Details → select document action
2. Incoming Doc Registration → attach correspondence/memo image, press proceed → Document Details → select document action
3. List (Incoming, Internal, Outgoing) → press reg no. → Document Details → select document action
4. Search (search result screen) → press reg no. → Document Details → select document action



Press **Reg no.** the system will display document details and all other document menus

Here at the document details screen, you can select document menu desired or press at the reference number to track document. You can alternatively view attachment(s) below



Document details

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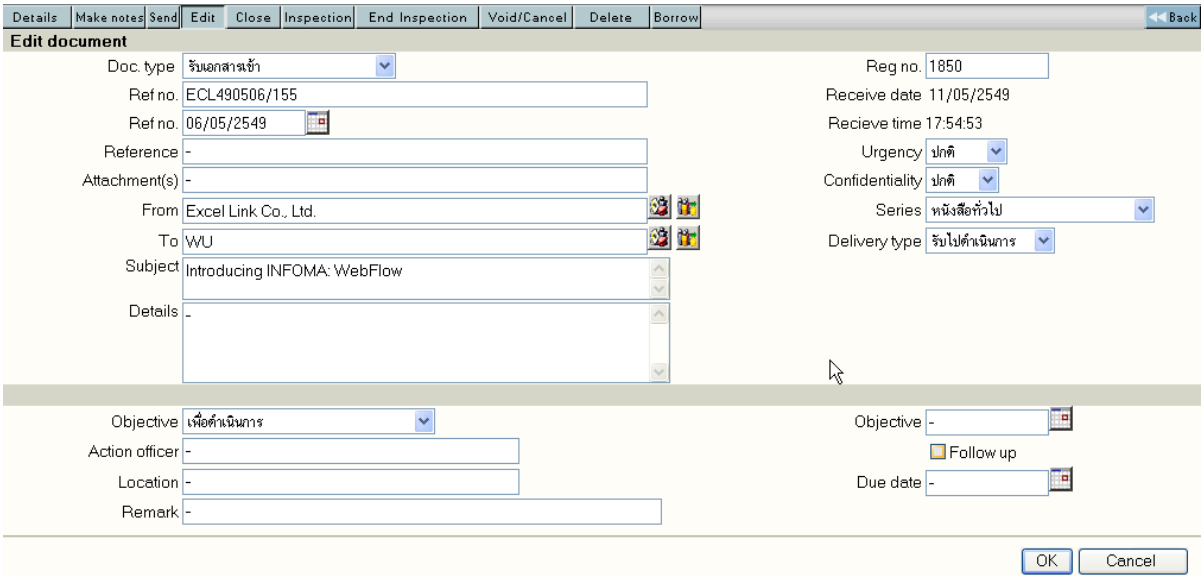
➢ Edit

If you need to add more details or edit mistype, press **Edit** button

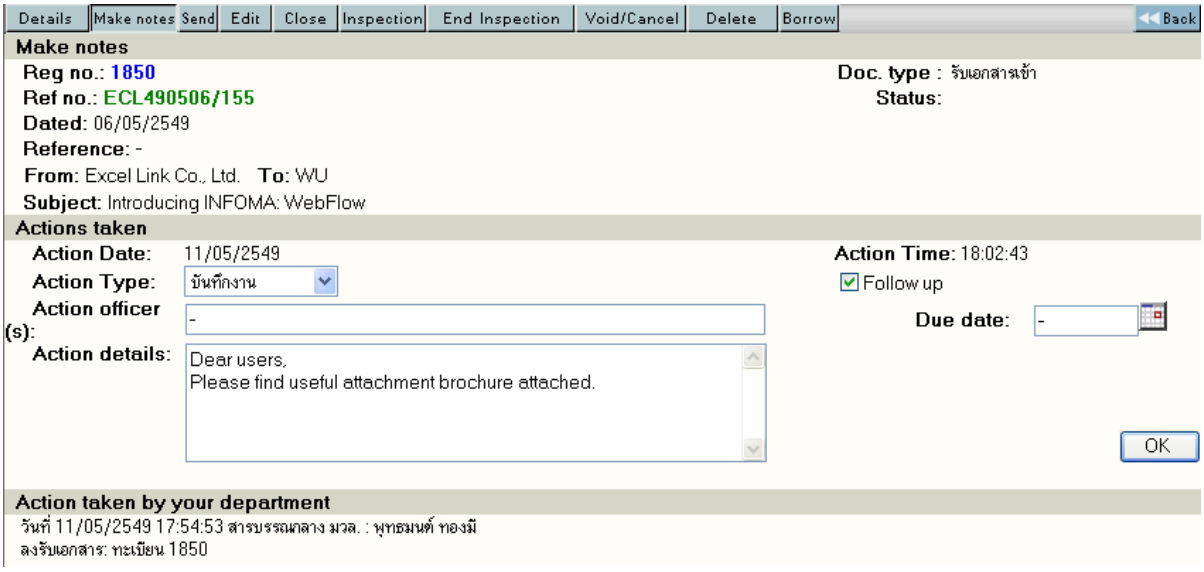


Edit details

You can edit information the creator typed in. After editing, press OK. What you altered will be recorded in document history to be able to trace what was before and after editing

➢ Make notes

Make action notes is one critical process in document working process. You can track what was ordered and what has been done from notes taken. You can make notes by pressing **Make notes** button. Provide action officer's name and/or details. Press **OK** when finished



Make action notes

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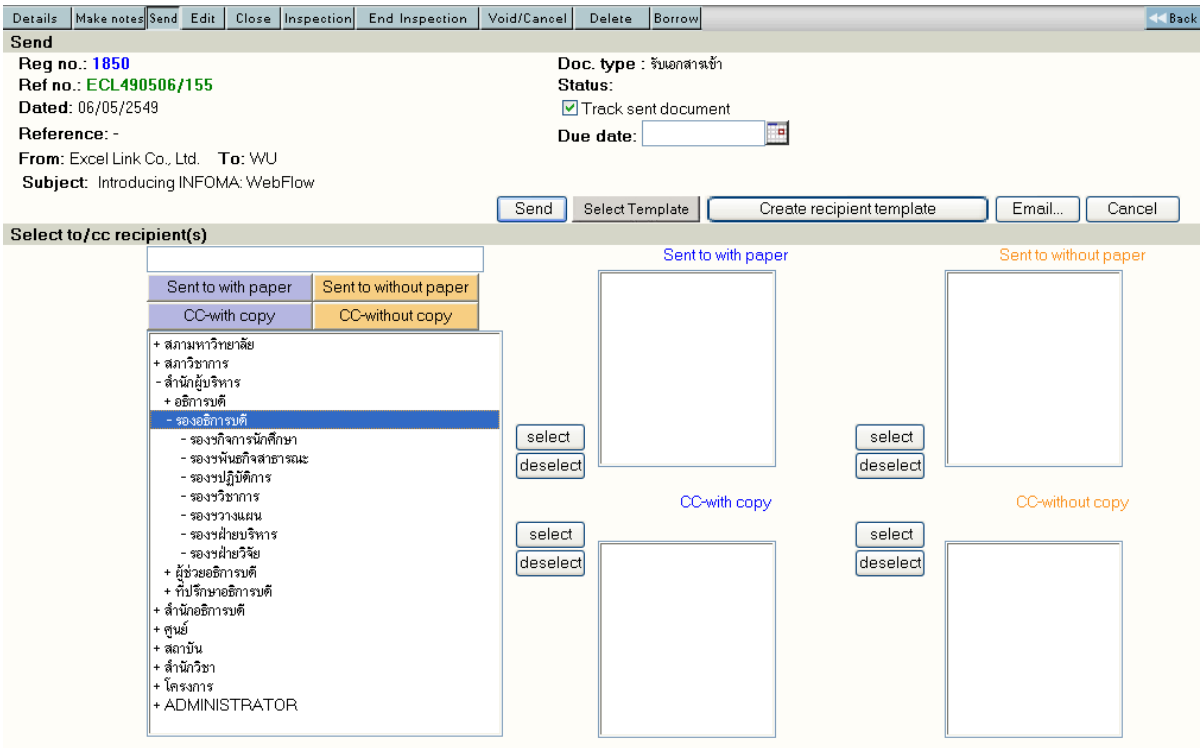
➢ Send

If you need to send this document, press **Send** button. The system will display recipient in INFOMA: WebFlow system in actual organization structure.



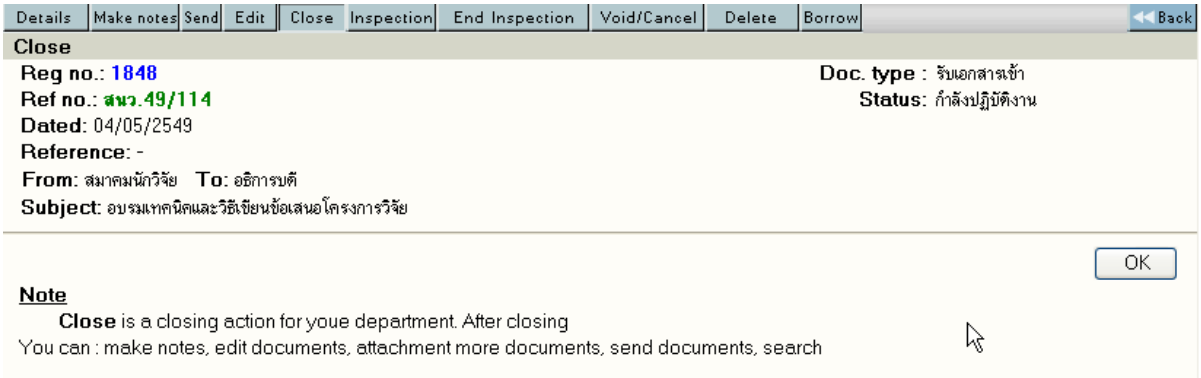
Send document

Select recipient by clicking the department and press **select** in the send type box. Select the selected recipient and press **deselect** to move the recipient out from the sending list.

If you want to sent the document via E-mail, press Email button. Then send document by providing e-mail addresses

➢ Close

Some documents need not to send or pass on, or if sending actual document to Non-INFOMA user, you can close the document to imply that the working process has been done. Press **Close** then OK



Close document

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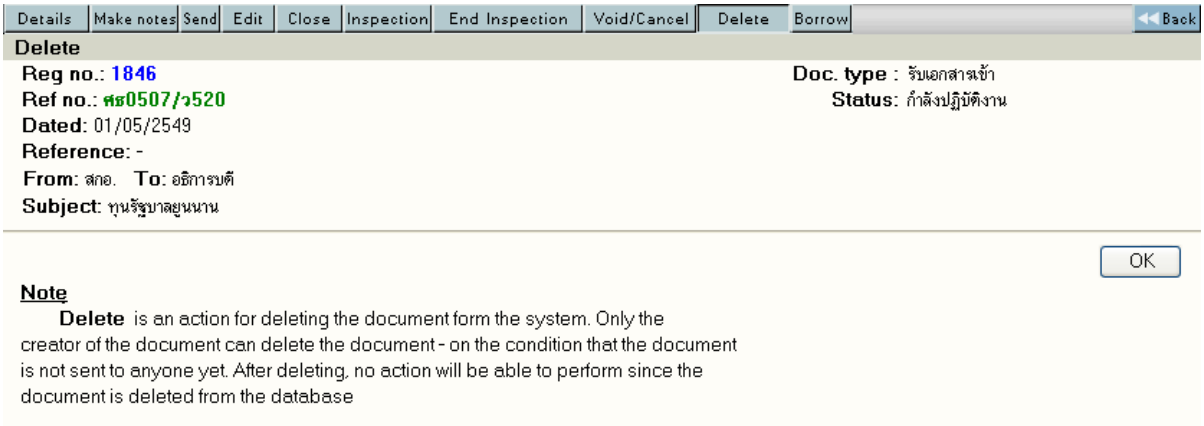
➢ Delete and Void/cancel

Delete

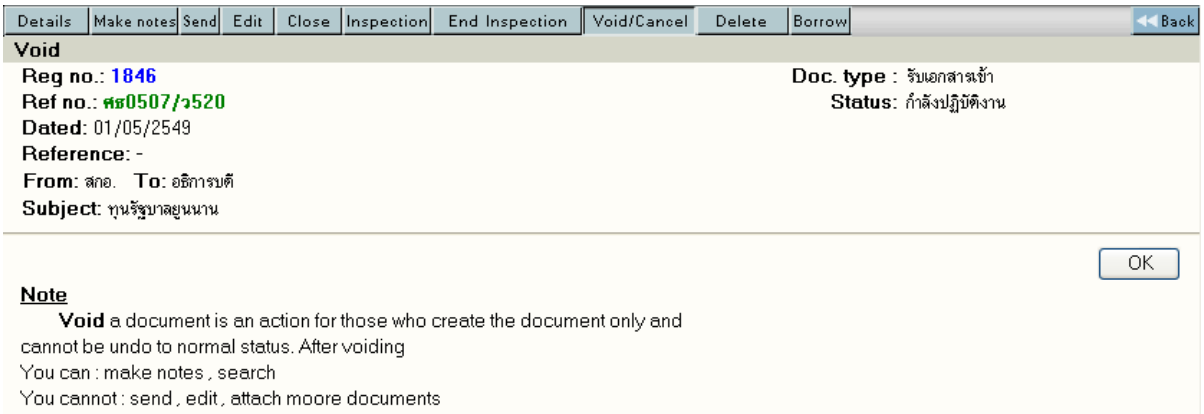
If the document you created and has not been sent to anyone, you can delete document by pressing **Delete** button. **<u>The document will be deleted from the database and can not be traced ever again</u>**. The registration number of such document will be missing from your list

If you want to use that reg. no., type in the deleted reg no. in the reg no. box when registering incoming document from Registration menu or from Inbox menu



Void/cancel

If the document you created has been sent out, you cannot delete the document but you can void/cancel it. Press **Void/Cancel** button, then OK. The voided document will have this status 🚫. The document can still be traced, but can no more proceed any document work.



The **void** status

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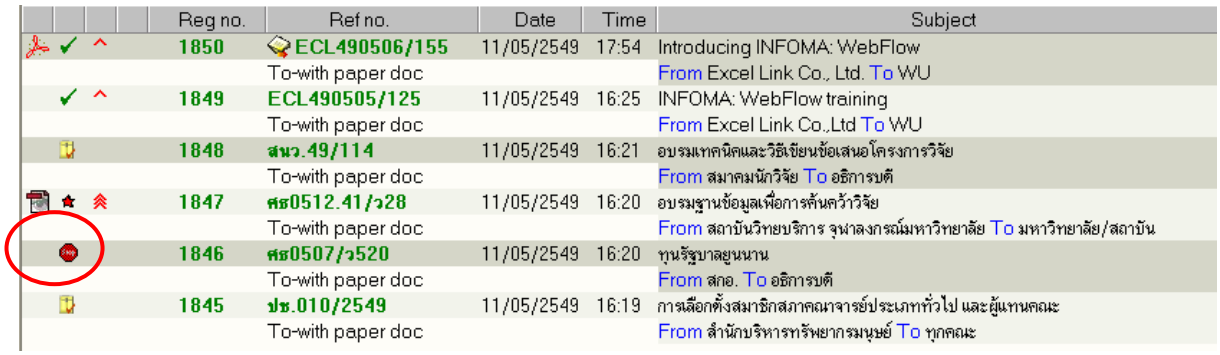
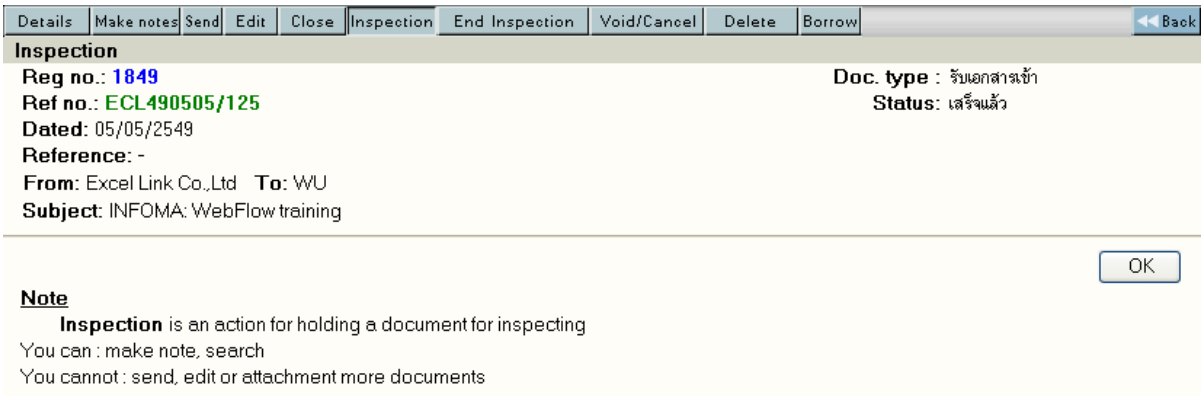


Reg no.	Ref no.	Date	Time	Subject
1850	ECL490506/155	11/05/2549	17:54	Introducing INFOMA: WebFlow
	To-with paper doc			From Excel Link Co., Ltd. To WU
1849	ECL490505/125	11/05/2549	16:25	INFOMA: WebFlow training
	To-with paper doc			From Excel Link Co.,Ltd To WU
1848	สนว.49/114	11/05/2549	16:21	อบรมเทคนิคและวิธีเขียนข้อเสนอโครงการวิจัย
	To-with paper doc			From สมาคมนักวิจัย To อธิการบดี
1847	ศธ0512.41/ว28	11/05/2549	16:20	อบรมฐานข้อมูลเพื่อการค้นคว้าวิจัย
	To-with paper doc			From สถาบันวิทยบริการ จุฬาลงกรณ์มหาวิทยาลัย To มหาวิทยาลัย/สถาบัน
1846	ศธ0507/ว520	11/05/2549	16:20	ทุนรัฐบาลยูนนาน
	To-with paper doc			From สกอ. To อธิการบดี
1845	ปช.010/2549	11/05/2549	16:19	การเลือกตั้งสมาชิกสภาคณาจารย์ประเภททั่วไป และผู้แทนคณะ
	To-with paper doc			From สำนักบริหารทรัพยากรมนุษย์ To ทุกคณะ

➢ Inspection and End Inspection

Inspection

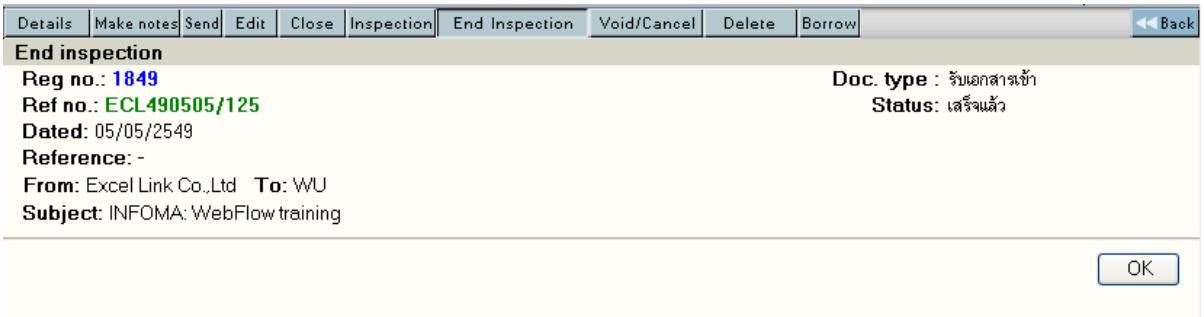
In this case, you will withhold document process.



Press **Inspection** button. The system will withhold the document for inspection so it cannot be passed on. The green star icon ✪ will appear as inspection status

End Inspection

When inspected, you can End Inspection so you can proceed document as usual. Press **End Inspection**



Press OK to confirm. The system will return the document status as it was before inspection. You can proceed any document work as usual.

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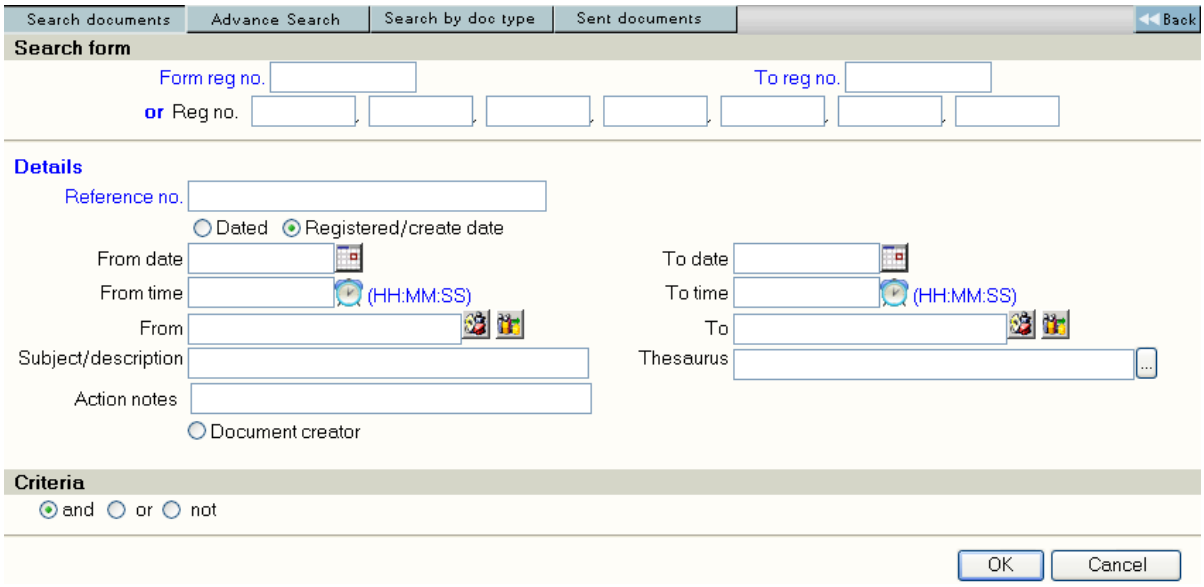
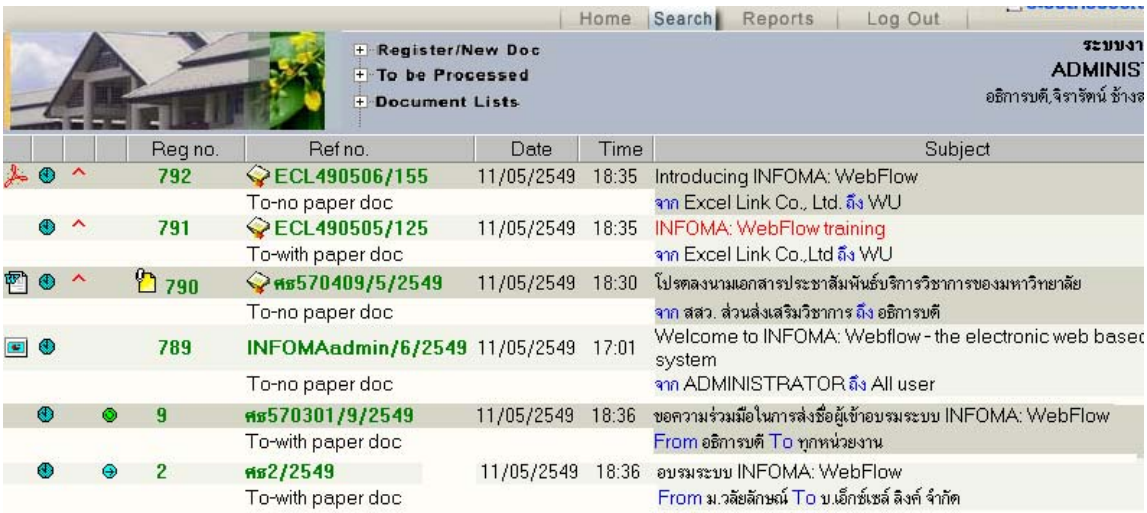
Searching

Documents sent to you or documents you registered (incoming, internal, outgoing) to send to other are in your document lists. You can search documents within your department from the "**Search**" menu. Provide some search criteria to search from many search functions



Searching

Press OK. The system will display search result according to search criteria. Notify the Search button indicating that the document list is on search function



Search result

You can press at the reg. no. to do document work or view document details

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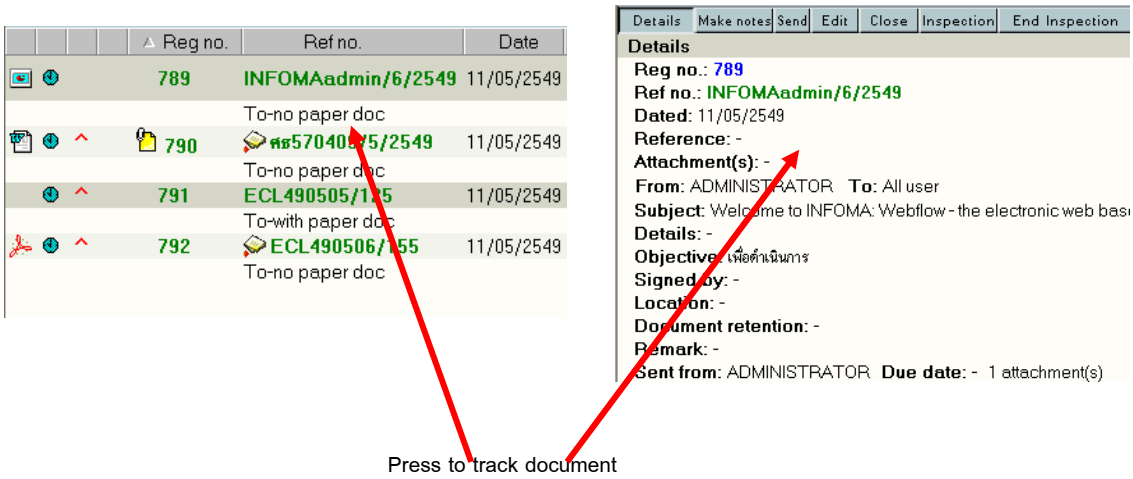
Tracking document

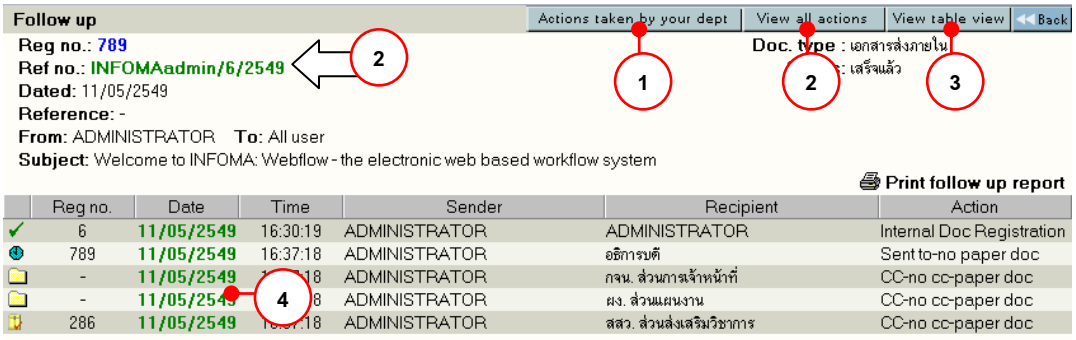
All recipients of a document can trace document path and actions taken in respect of order from its creation (registration) to the last action by pressing Ref no. from document list screens or from document details screen



The system will then display document path from its creation to current status

Details in document path

1. Status is document status of the recipient
2. Reg. no. is registration number of the recipient
3. Date/time is create/send date
4. Sender is sender's department name
5. Recipient is receiver of document whom which the document status and reg no. belongs to
6. Action is action taken in the process



Document path

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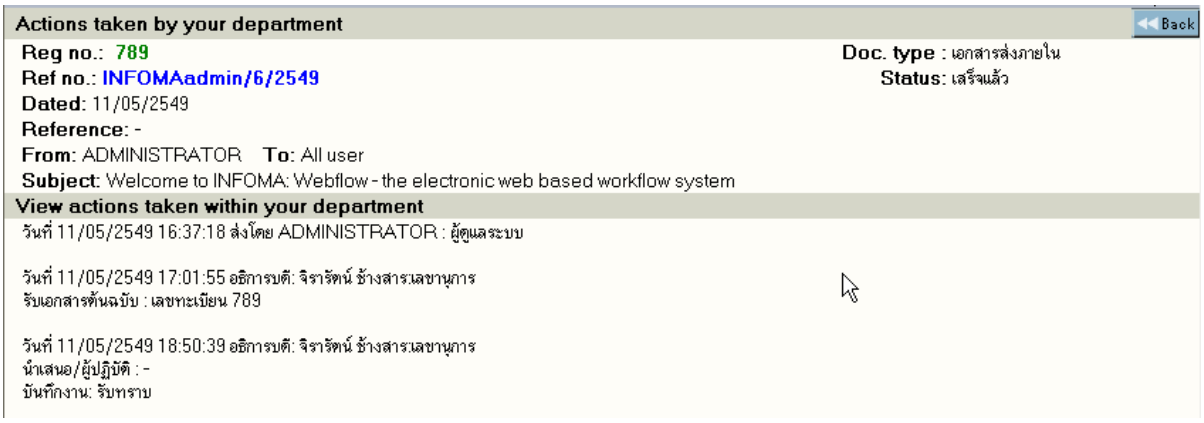
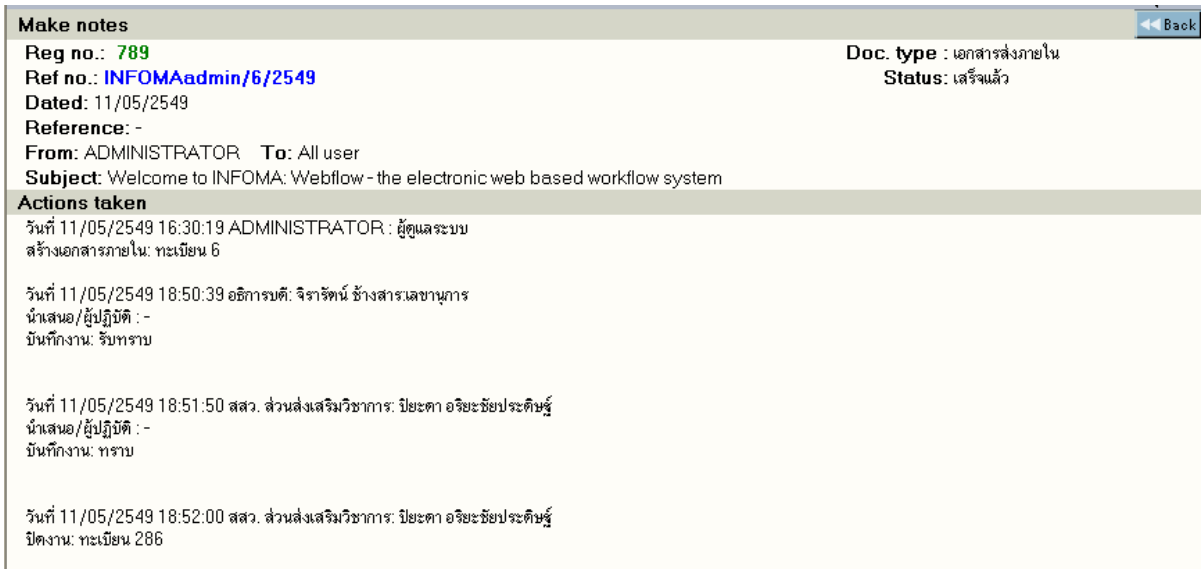
1 Actions taken in your department

Displays all document actions taken by staffs in your department such as registration, make action notes, close document.



2 View all actions

View all actions taken by all creator, receivers in chronological order which includes registration, editing history, make action notes. Actions recorded includes user name and department to which he/she is in as illustrated.



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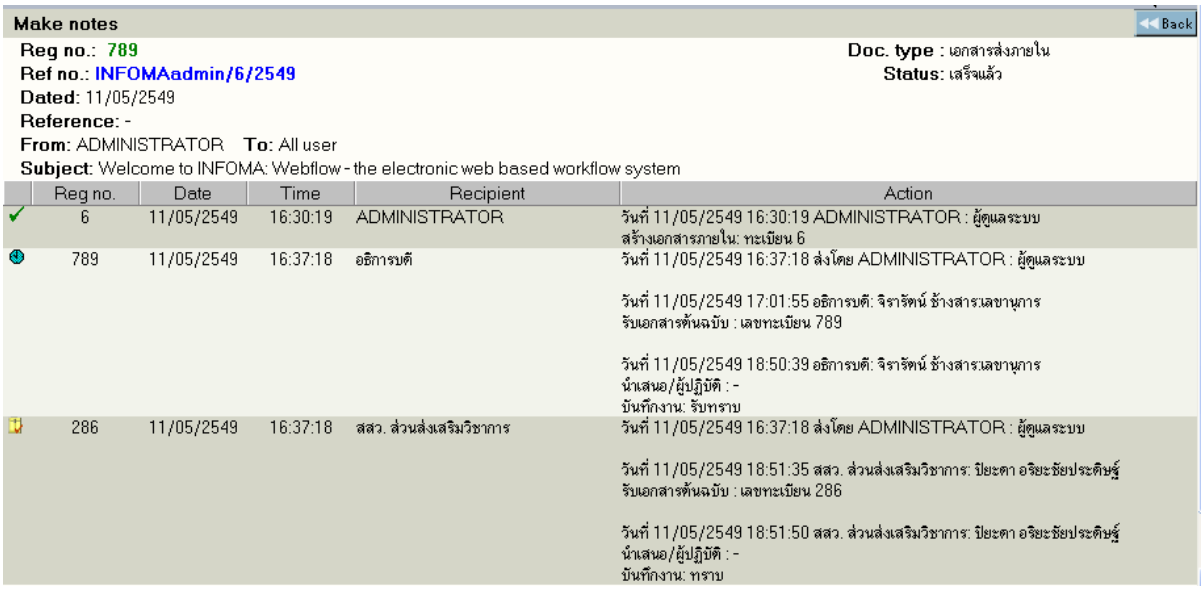
3 View table view

Displays actions taken of department that register the document about registration, action notes including return and withdraw history



Make notes Back

Reg no.: 789
Ref no.: INFOMAadmin/6/2549
Dated: 11/05/2549
Reference: -
From: ADMINISTRATOR **To:** All user
Subject: Welcome to INFOMA: Webflow - the electronic web based workflow system

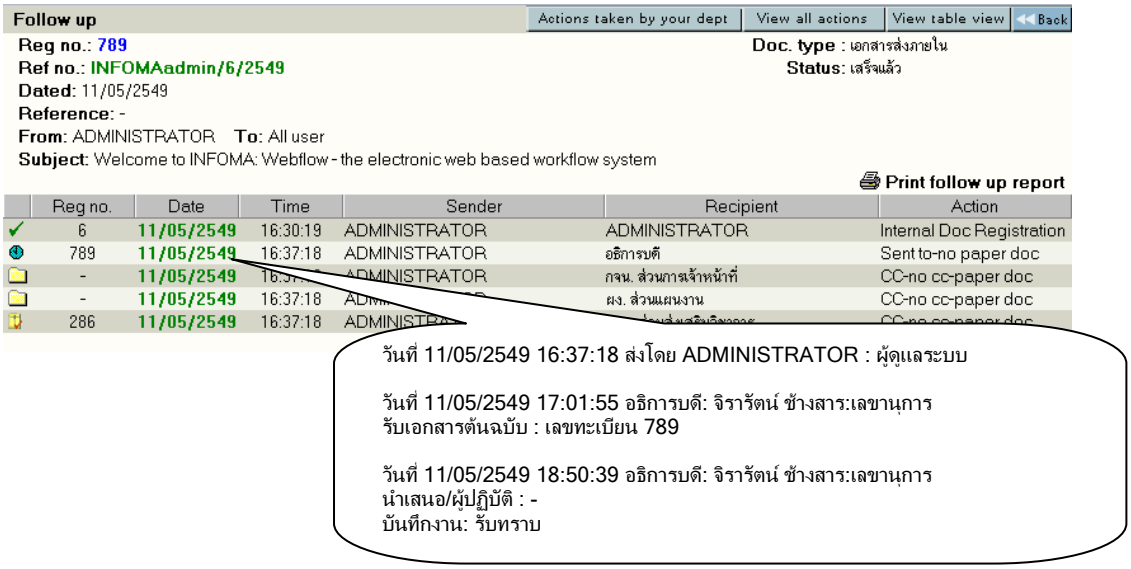
Doc. type : เอกสารส่งภายใน
Status: เสร็จแล้ว

	Reg no.	Date	Time	Recipient	Action
✓	6	11/05/2549	16:30:19	ADMINISTRATOR	วันที่ 11/05/2549 16:30:19 ADMINISTRATOR : ผู้ดูแลระบบ สร้างเอกสารภายใน: ทะเบียน 6
	789	11/05/2549	16:37:18	อธิการบดี	วันที่ 11/05/2549 16:37:18 ส่งโดย ADMINISTRATOR : ผู้ดูแลระบบ วันที่ 11/05/2549 17:01:55 อธิการบดี: จิรารัตน์ ช้างสาร:เลขานุการ รับเอกสารต้นฉบับ : เลขทะเบียน 789 วันที่ 11/05/2549 18:50:39 อธิการบดี: จิรารัตน์ ช้างสาร:เลขานุการ นำเสนอ/ผู้ปฏิบัติ : - บันทึกงาน: รับทราบ
	286	11/05/2549	16:37:18	สสว. ส่วนส่งเสริมวิชาการ	วันที่ 11/05/2549 16:37:18 ส่งโดย ADMINISTRATOR : ผู้ดูแลระบบ วันที่ 11/05/2549 18:51:35 สสว. ส่วนส่งเสริมวิชาการ: ปิยะตา อริยะชัยประดิษฐ์ รับเอกสารต้นฉบับ : เลขทะเบียน 286 วันที่ 11/05/2549 18:51:50 สสว. ส่วนส่งเสริมวิชาการ: ปิยะตา อริยะชัยประดิษฐ์ นำเสนอ/ผู้ปฏิบัติ : - บันทึกงาน: ทราบ

ดูบันทึกแบบตาราง

4 View actions in pair from registration/sending date

The system displays information in pairs as illustrated



Follow up Actions taken by your dept | View all actions | View table view | Back

Reg no.: 789
Ref no.: INFOMAadmin/6/2549
Dated: 11/05/2549
Reference: -
From: ADMINISTRATOR **To:** All user
Subject: Welcome to INFOMA: Webflow - the electronic web based workflow system

Doc. type : เอกสารส่งภายใน
Status: เสร็จแล้ว

Print follow up report

	Reg no.	Date	Time	Sender	Recipient	Action
✓	6	11/05/2549	16:30:19	ADMINISTRATOR	ADMINISTRATOR	Internal Doc Registration
	789	11/05/2549	16:37:18	ADMINISTRATOR	อธิการบดี	Sent to-no paper doc
	-	11/05/2549	[illegible]	ADMINISTRATOR	กจน. ส่วนการเจ้าหน้าที่	CC-no cc-paper doc
	-	11/05/2549	16:37:18	[illegible]	ผง. ส่วนแผนงาน	CC-no cc-paper doc
	286	11/05/2549	16:37:18	[illegible]	[illegible]	[illegible]

วันที่ 11/05/2549 16:37:18 ส่งโดย ADMINISTRATOR : ผู้ดูแลระบบ

วันที่ 11/05/2549 17:01:55 อธิการบดี: จิรารัตน์ ช้างสาร:เลขานุการ
รับเอกสารต้นฉบับ : เลขทะเบียน 789

วันที่ 11/05/2549 18:50:39 อธิการบดี: จิรารัตน์ ช้างสาร:เลขานุการ
นำเสนอ/ผู้ปฏิบัติ : -
บันทึกงาน: รับทราบ

Include sender and receiver's names

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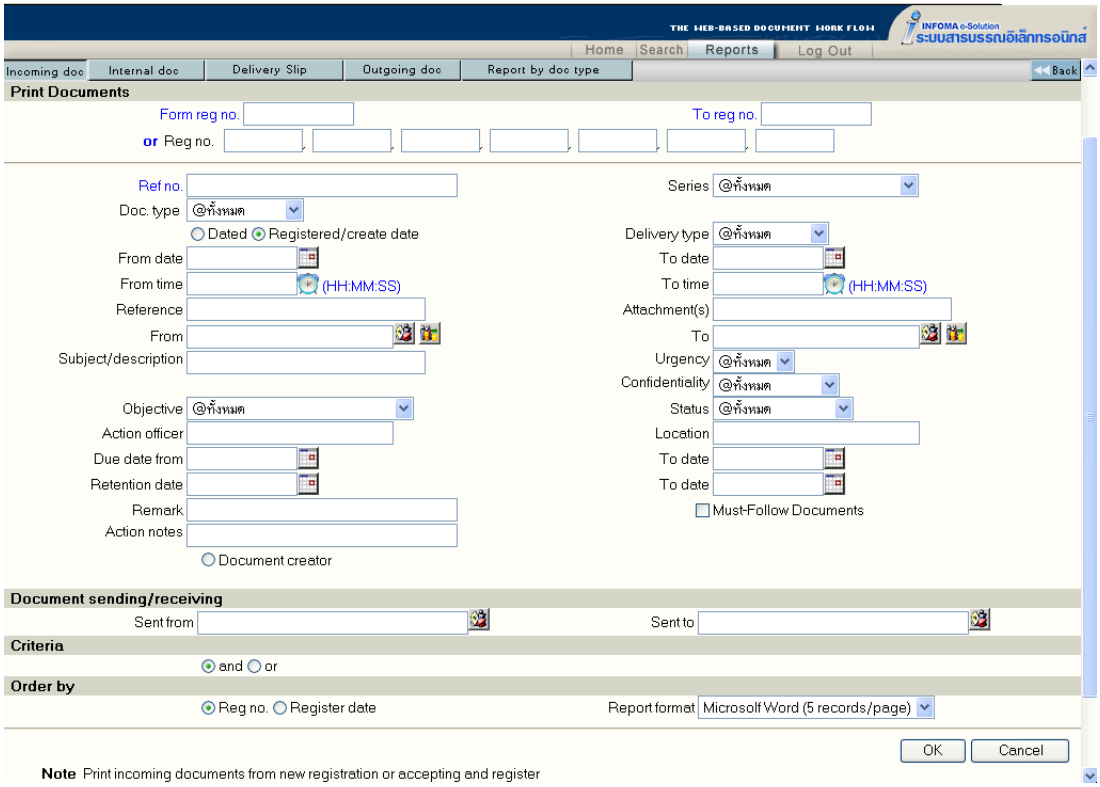
Reports

Reports are available, if you have Microsoft Office installed.

Choose **Reports** from the menu and select types of report. Provide report criteria e.g. incoming documents report – provide registration date or registration number

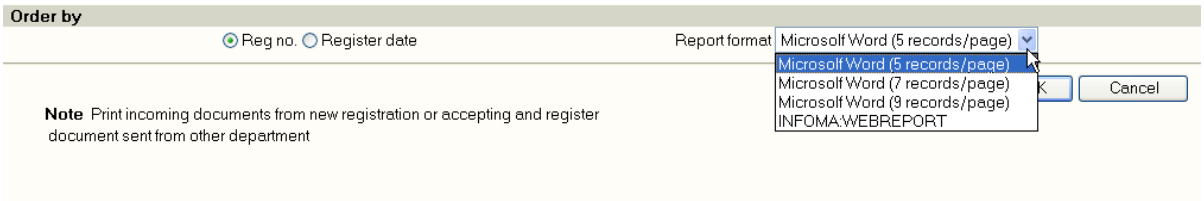


reports

Report types

Incoming doc	for reporting incoming document registered
Internal doc	for reporting internal memos issued by your department
Delivery slip	for printing delivery slip ready to signed by the recipients
Outgoing doc	for reporting outgoing correspondences
Report by doc type	for reporting other types of document (if any)

Provide report criteria. Reports can be generated in Microsoft Word format or INFOMA WebReport format



Press **OK** to view report

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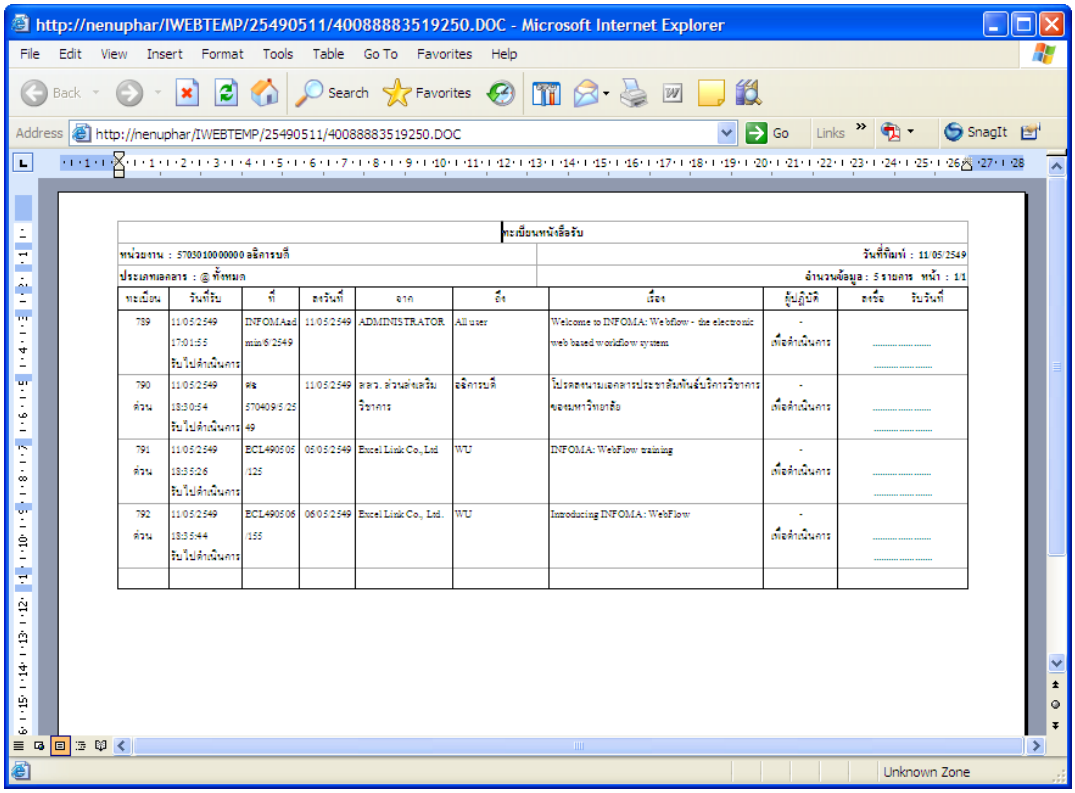
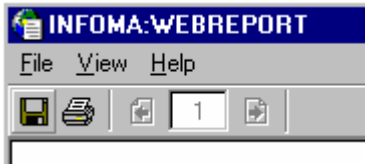
Note

You can choose and/or criteria. If you don't specify, the system will 'and' criteria by default. After providing report criteria, press OK, the system will display report according to criteria as illustrated



You can view report before printing using the Internet Explorer toolbar (File > Print). You can alter column width and other look before printing.

If you choose to print with INFOMA: WebReport, you must install the program first. You can order to print from the programs' shortcut



Shortcut details

DIKS for saving the report in HTML format

Printer for printing the report

Document left and right for viewing report if there are more than 1 page

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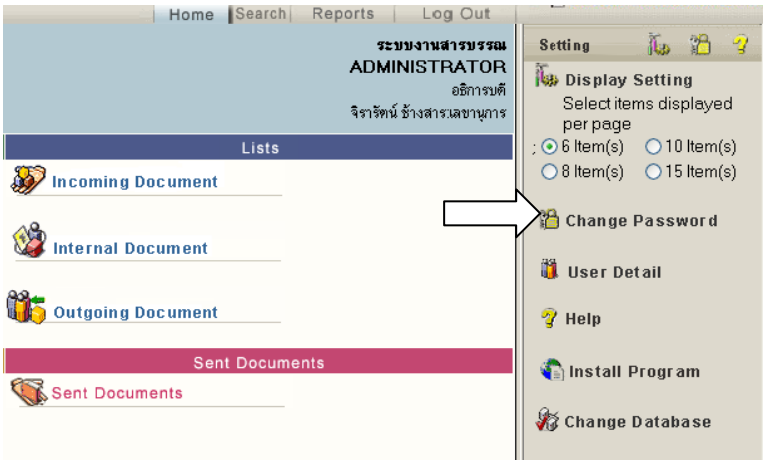
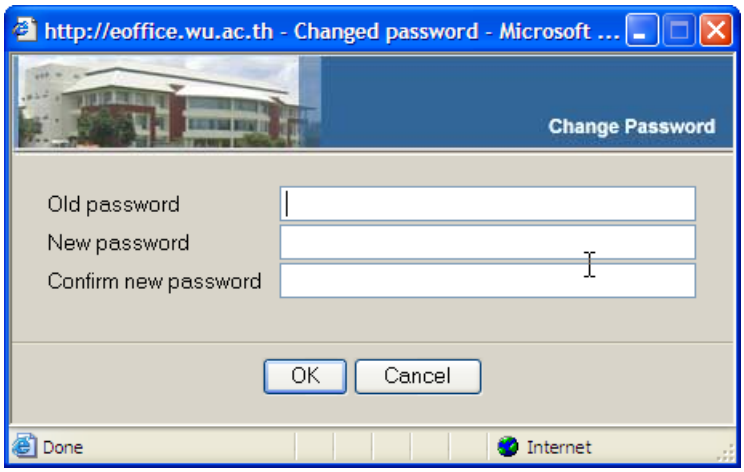
Change Password

You can change your password from **Change Password** menu in Home page



The system display a window to change password. You must provide original password first, then provide new password twice.



Change password

The system will record new password. When log out, you must provide log in with new password.

<u>Changing password</u>

1. You can change password at all time
2. password can be numeric and English character (case not sensitive)
3. password length must not exceed 14 characters

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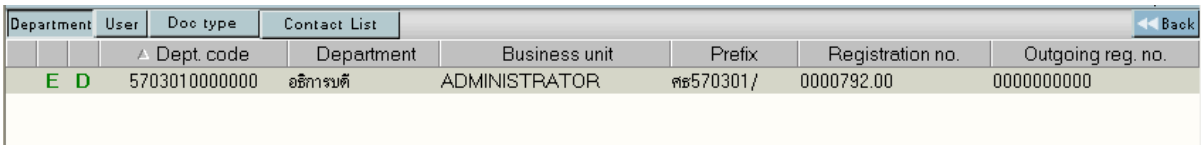
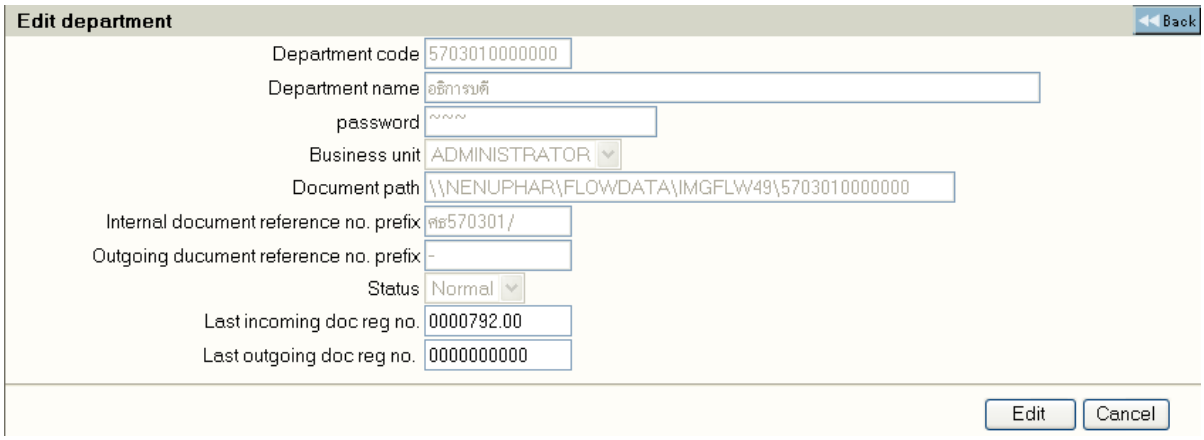
First time Setting

The registration number begins with 1 from new calendar year automatically. If you begin to use the system sometime during the year when you want to switch from manual system to electronic, you can continue your registration number by setting last registration number you use (in the manual system) from the Administration menu

Select **Administrator**. The system will then display administration menus. Select **Department**



Press **E** to edit the setting (Cannot press D for delete-allow only system administrator)



Editing registration number

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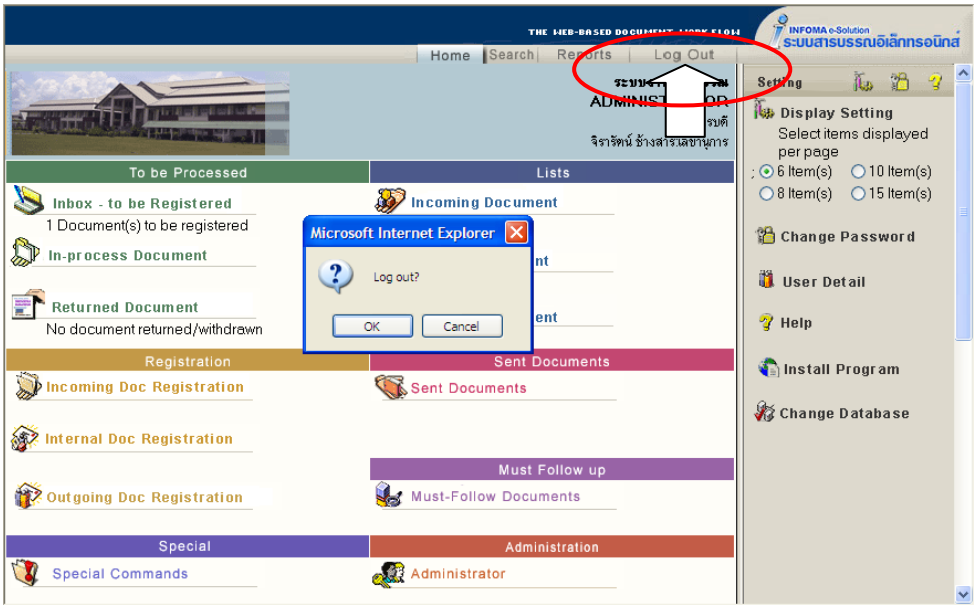
Provide last incoming and internal registration number used in the manual system, then press Edit. For example, if you want to begin using INFOMA: WebFlow with reg. no. 21, provide 20 in the box

If you have additional document list, your document type will appear at the Doc type menu, where which you can adjust last registration number as well

Additional document type reg no. setting

Log out

You can press Log out from the menu then OK to log out from the system and go back to the log in screen



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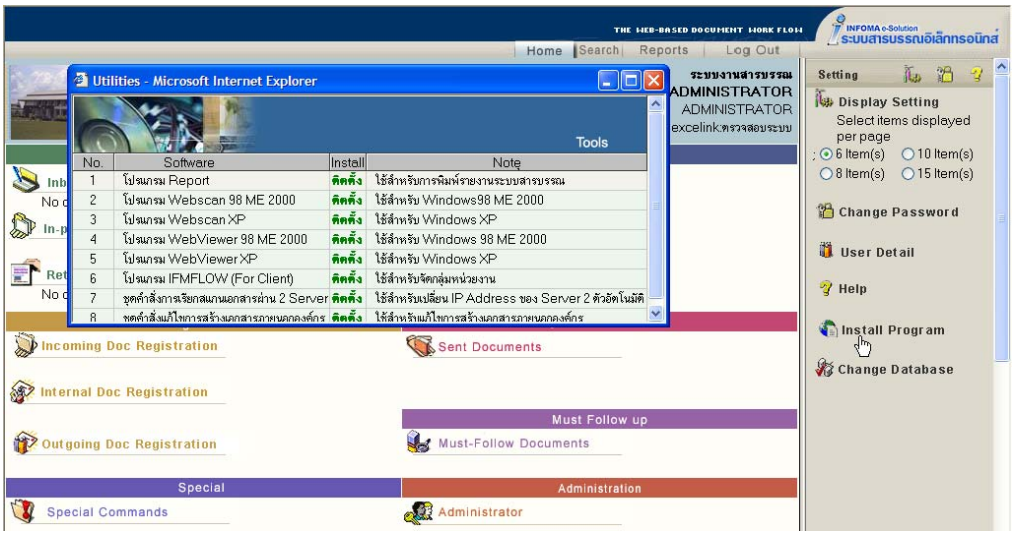
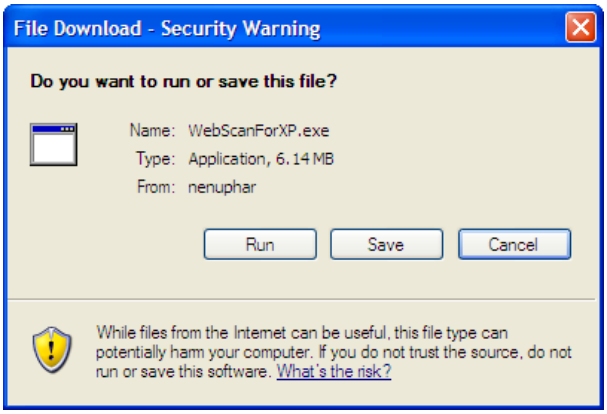
Installing INFOMA: WebScan

From Home page, select Install Program, then select WebScan according to your computer's operating system



save



Select location to save file

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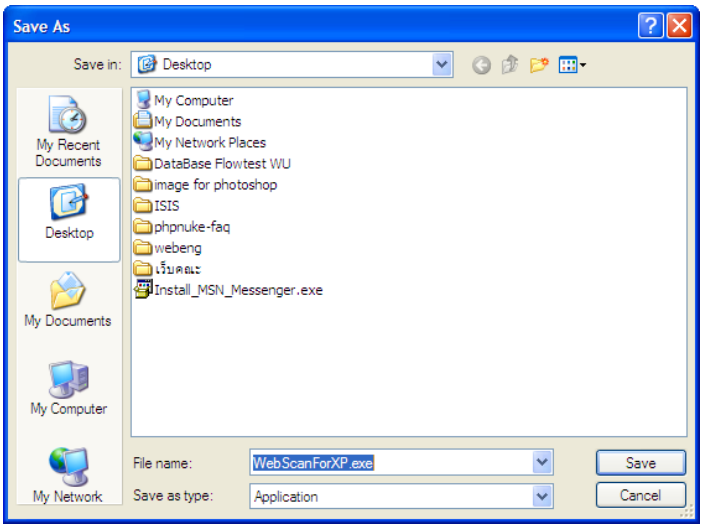
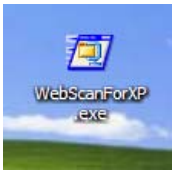
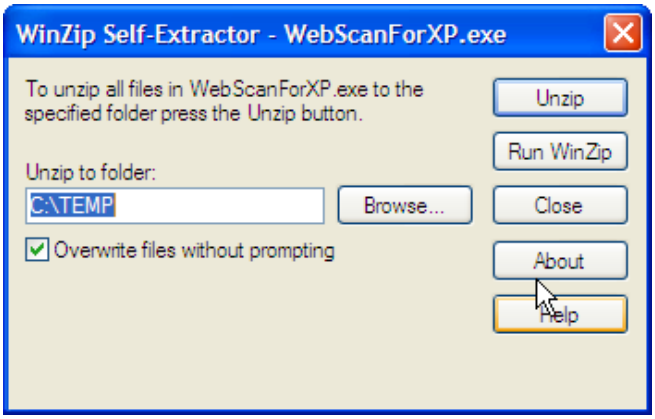


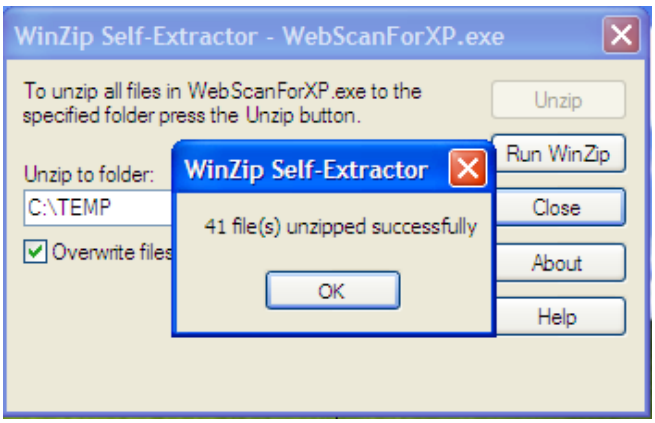
Go to location you saved the file, double click the file



Press Unzip



When unzipped, it will be like this



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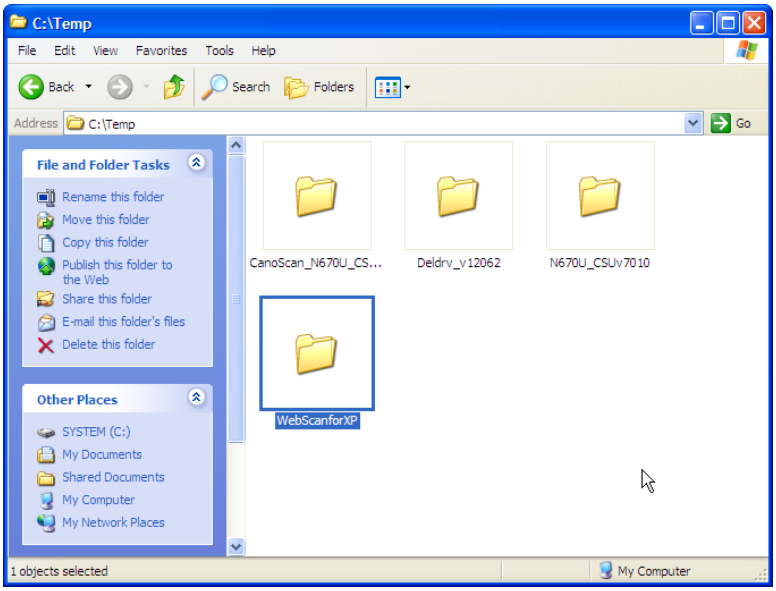
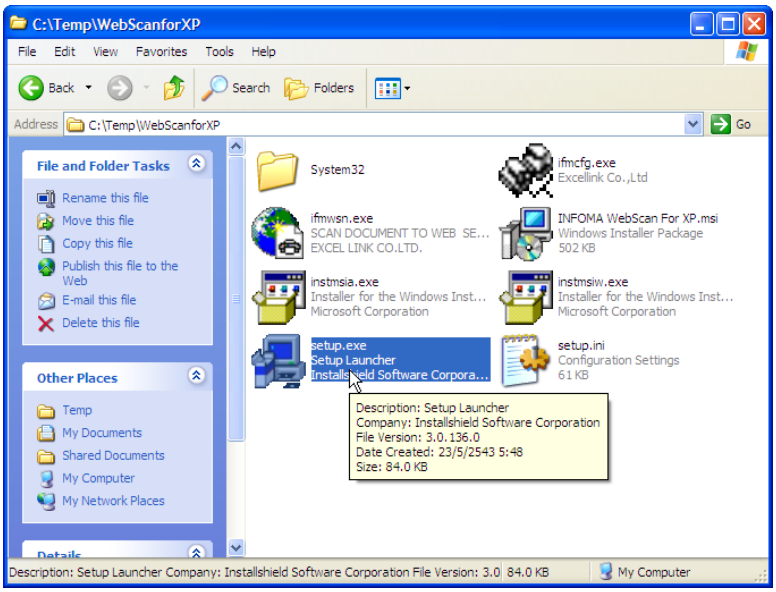
Go to the location you unzipped, double click



Double click the setup.exe



Next

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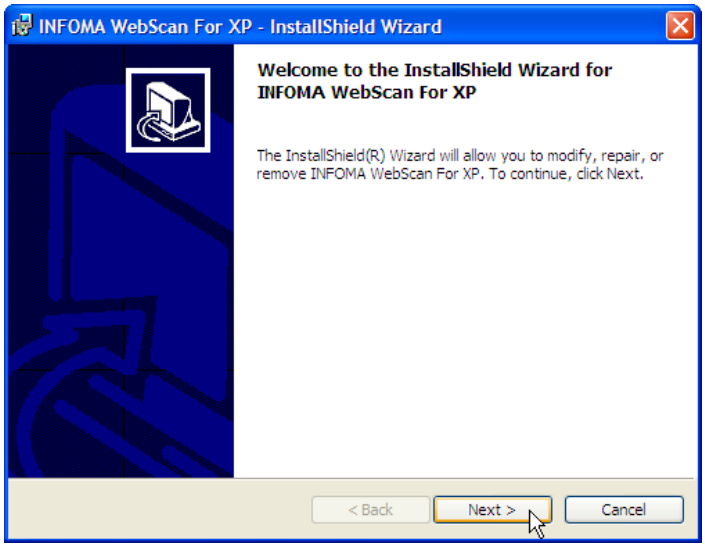
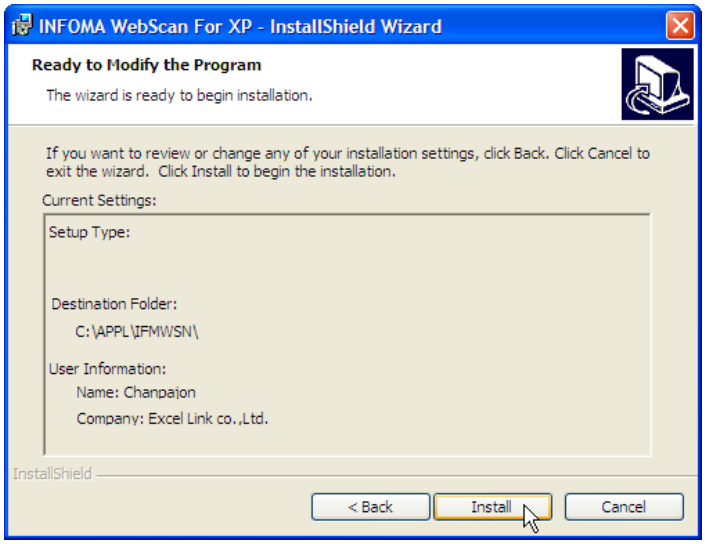
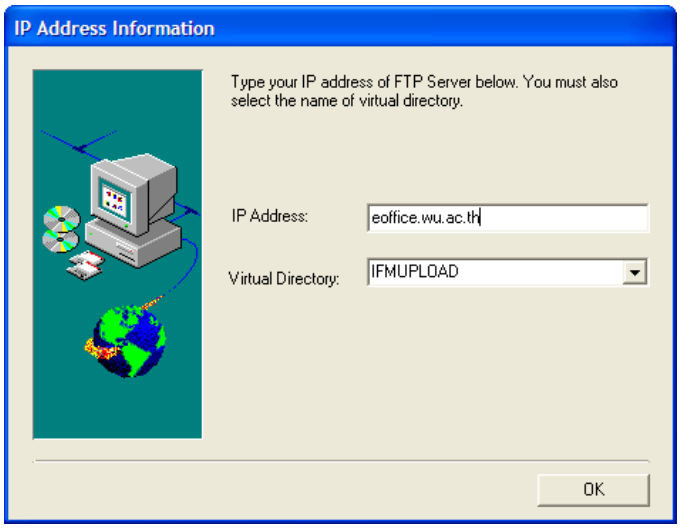


Install



Provide server IP/domain



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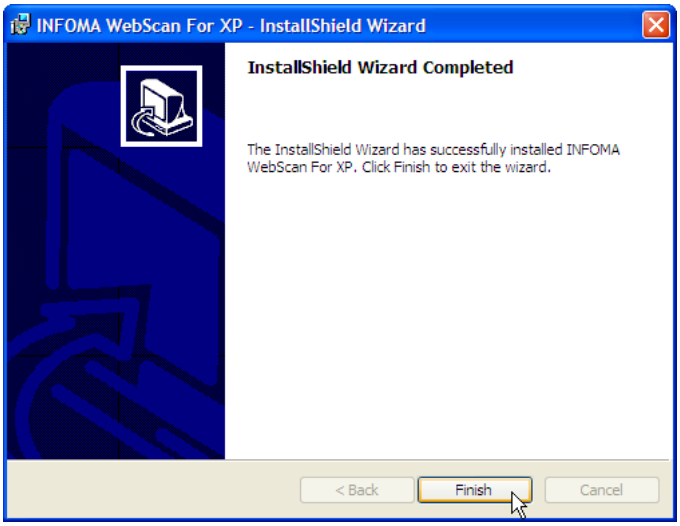
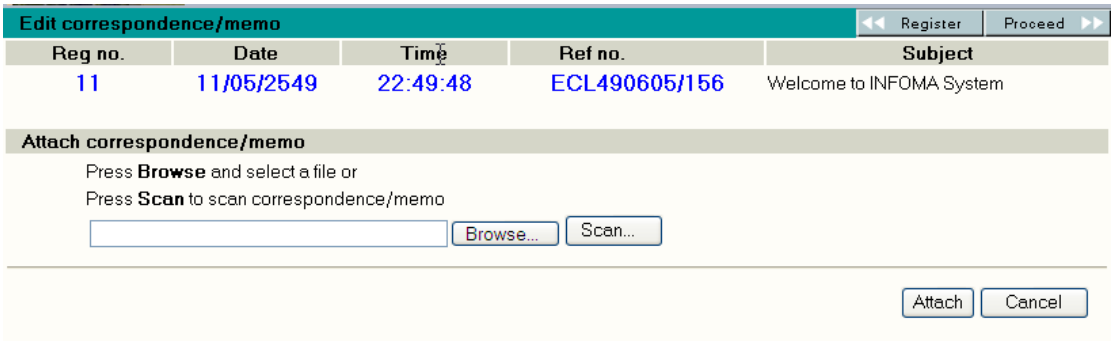
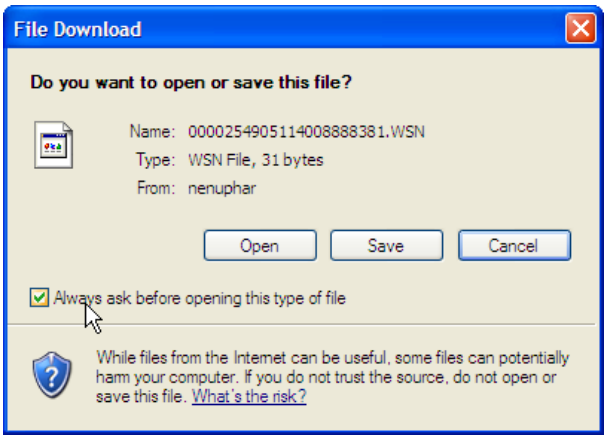
Finish



When scanning document, press scan



First time use, it will appear like this. Deselect Always ask… then Open. Next time it will open scan screen automatically



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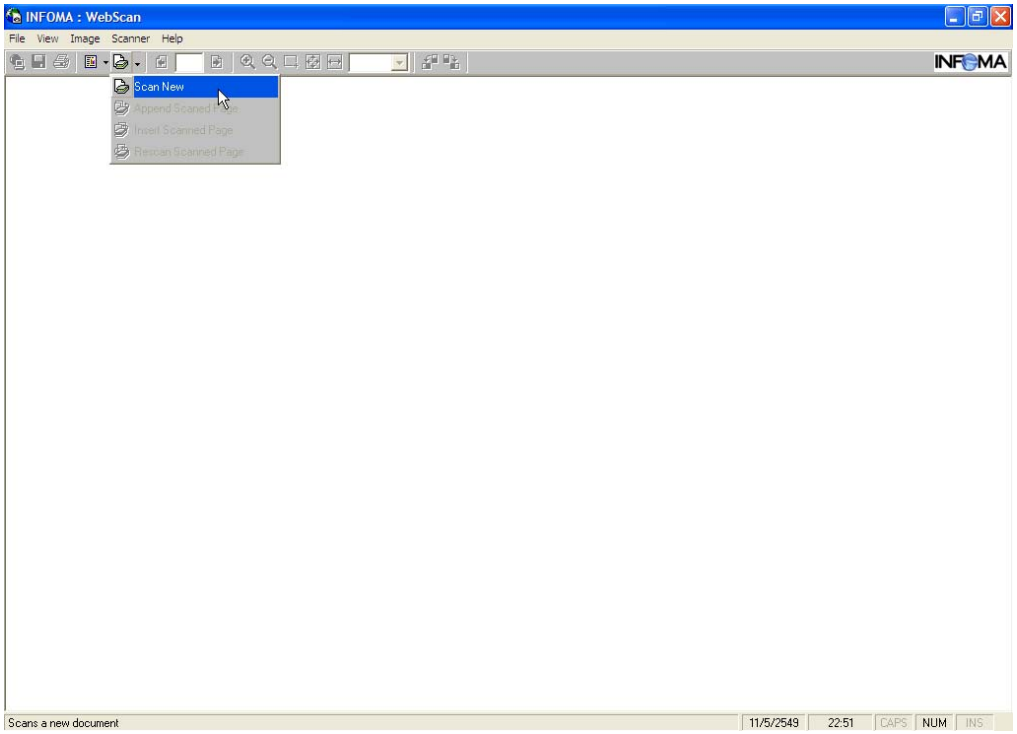
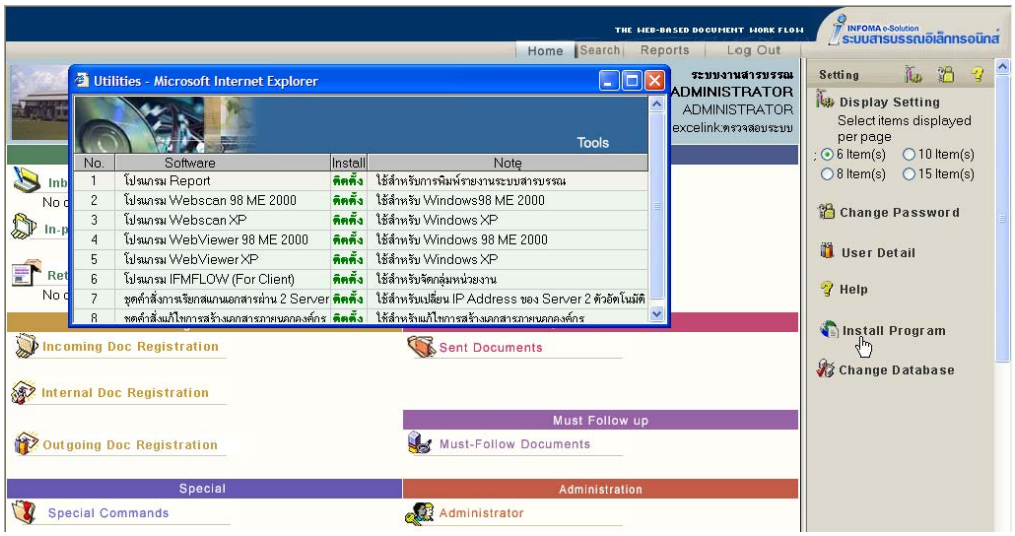
It will then open INFOMA: WebScan



Installing INFOMA: WebViewer

From Home page, select Install Program, then select WebViewer according to your computer's operating system



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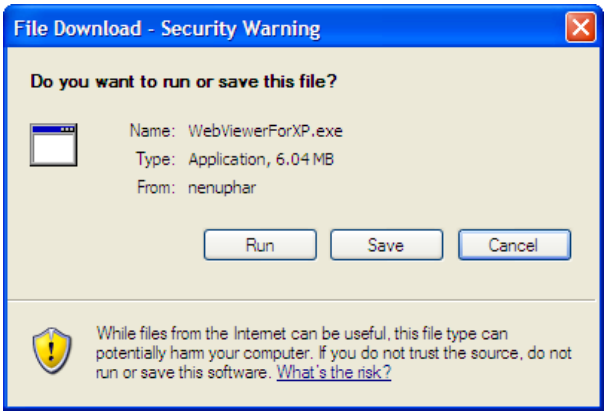
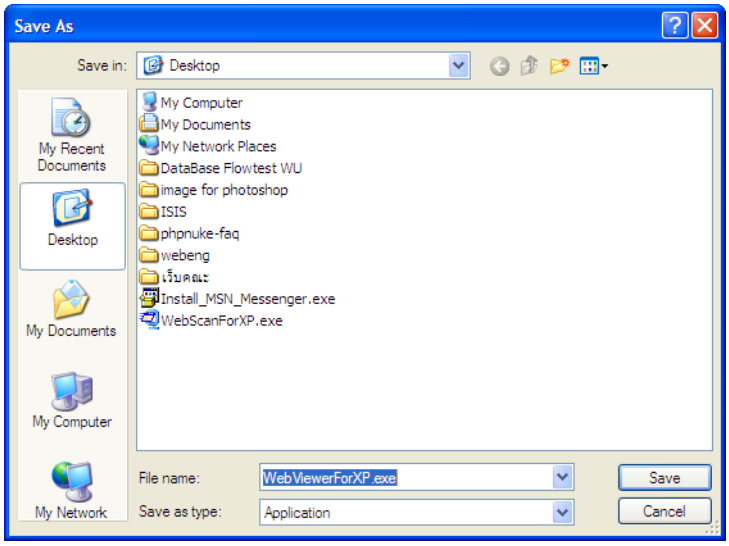
save

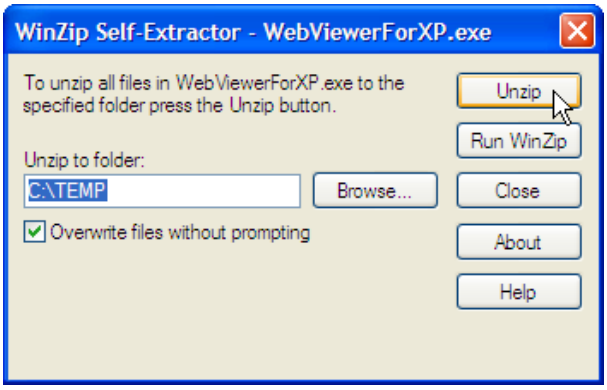


Select location to save file



Go to that location and double click the file

Unzip



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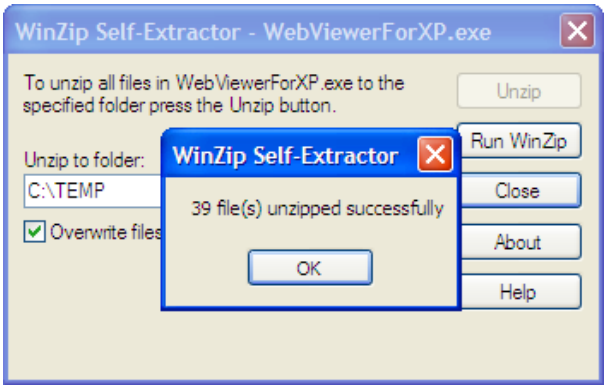
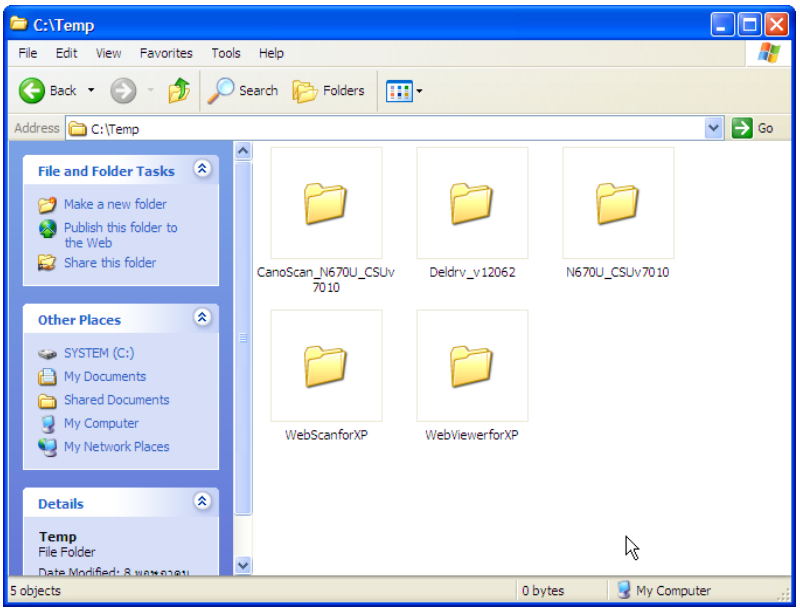
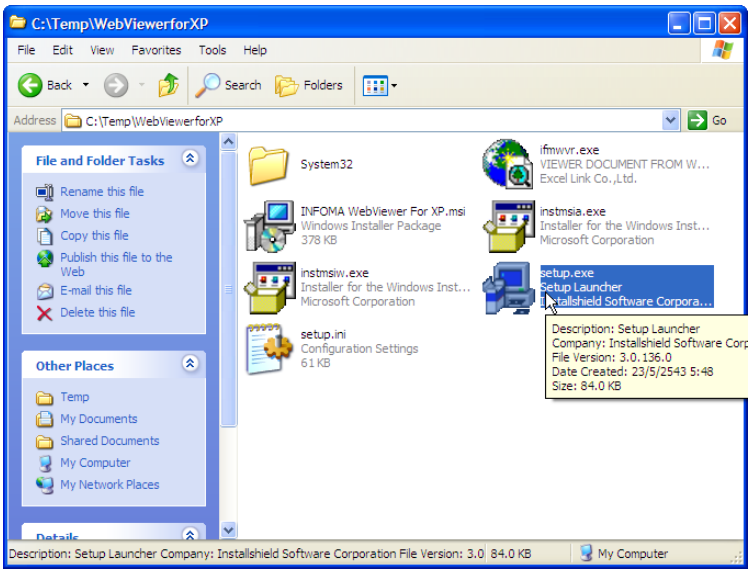
When unzipped, it'll look like this



Go to the location you unzipped, double click the WebViewer folder



Double click setup.exe



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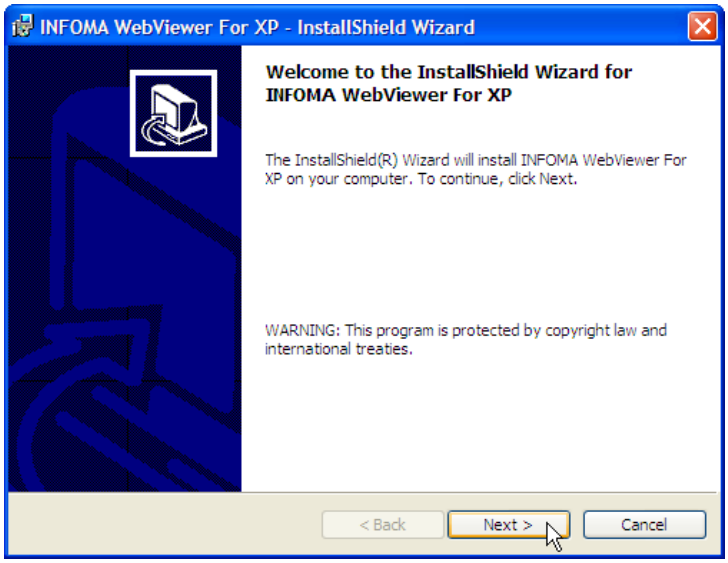
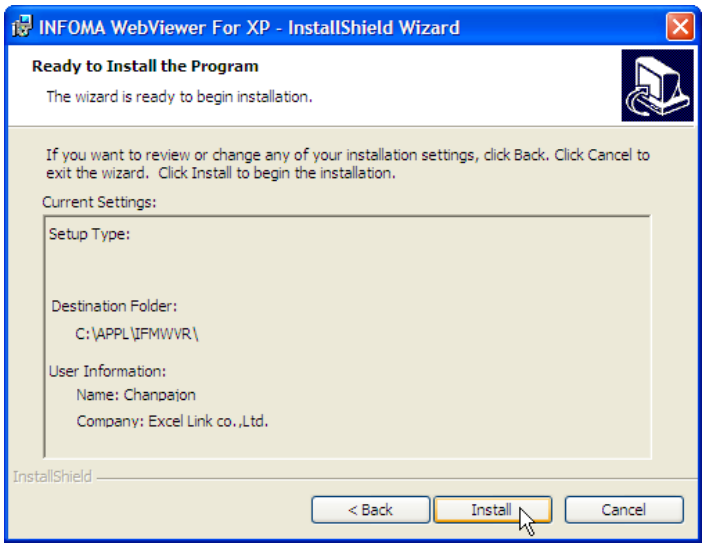
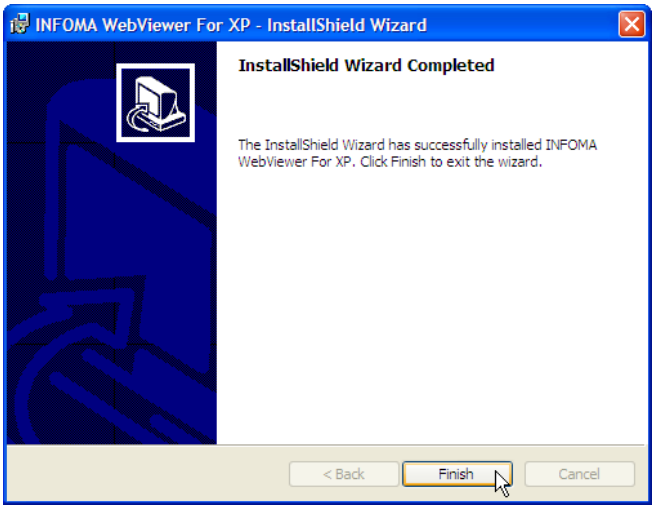
Next



Install



Finish



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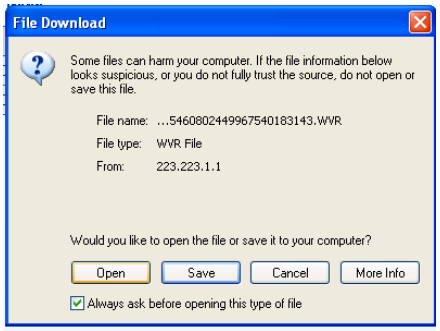
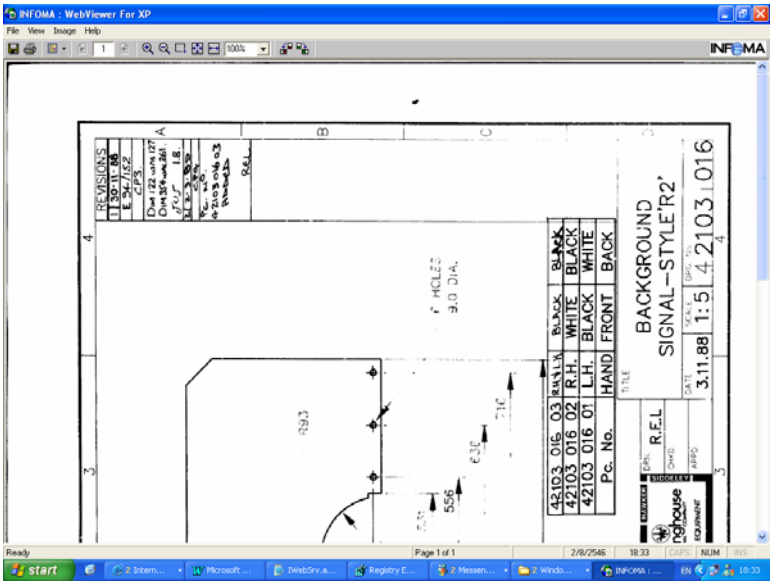
To view attachment, click the icon, the system will ask like this. Deselect Always ask… and press Open



The system will open the attachment with INFOMA: Viewer. Next time it won't ask you to open or save ever again



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