



User Guide

Tawasol



Workflow



Version 2019



حقوق الطبع والنشر © 2019

شركة إيبل للاستشارات الكمبيوتر

دولة قطر



Document Control المتغيرات على الوثيقة

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Table of contents

الموضوع	الصفحة
1 Introduction	5
1.1 About this guide	5
2 CMS ADD-IN	6
3 Prepare document from Microsoft Word	6
3.1 Configuration	6
3.2 Send	8
4 Edit in desktop	11
5 Create a paper document through Microsoft Outlook	13
6 Add-In Setup	15



1 Introduction

- ◀ Welcome to the correspondence system and electronic archive Design and development of communications and electronic archive of all the functions of the correspondence (preparation, transport, archiving) between the departments of the Committee. It also helps in the preparation and archiving of communications between the departments Committee and other entities.
- ◀ System is characterized by multiple advantages make it easier for the performance of its work, and also facilitate cycle workflow. As well as to reduce the frequent use of paper and print transactions and sent by correspondents to the concerned authorities within the Commission. The system includes screens more flexible and the process for the introduction of documents and archiving.
- ◀ We have worked hard to design and develop a single system doing all the regulations referred to within the working environment comfortable, so that makes it easier for all staff to use easily and great flexibility.
- ◀ Let us proceed to a directory system to find out more about this wonderful system.

1.1 About this guide

- ◀ This guide has been specially designed to contain all the new functions of integrating a Microsoft Word & Microsoft Outlook TAWASOL and completion of all your tasks related to electronic correspondence.

2 CMS ADD-IN

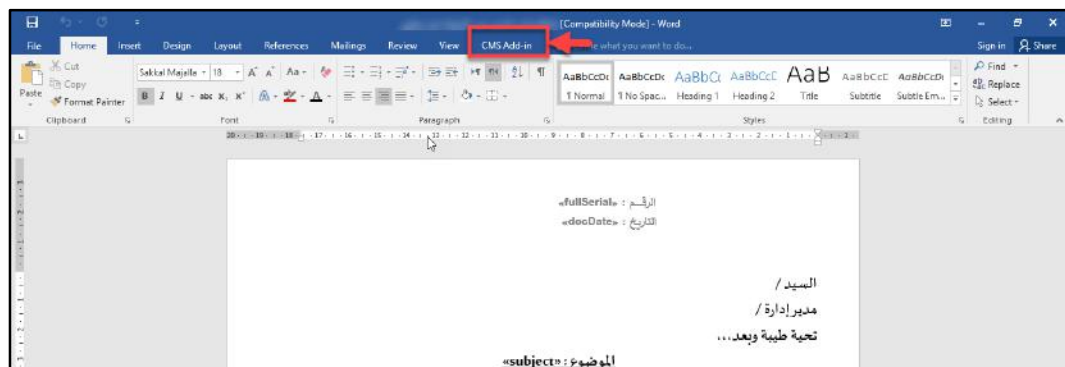
- ▶ TAWASOL system integrates with Microsoft Office [Word and Outlook] and the user can create a document directly from the desktop to the system interface.
- ▶ This Feature also allows to the user to download all available templates from the system to desktop for use in the preparation of documents and also the availability to send the document.

3 Prepare document from Microsoft Word

3.1 Configuration

- ▶ You must follow these steps:
 - ▶ First make sure to set up the tool on your personal computer.
 - ▶ Open Microsoft Word then click on CMS Add-in tab

CMS Add-in



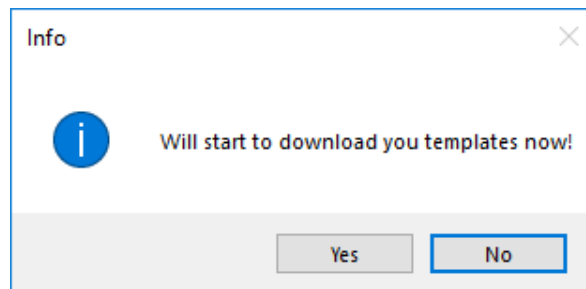
- ▶ When click on Configuration icon, the following mandatory fields are Filled:

- ▶ Server URL
- ▶ Username
- ▶ Password
- ▶ TAWASOL Id

 A screenshot of the 'Configuration' dialog box. It contains the following fields: 'Service URL' (http://tawasol.no-ip.org/8081/tal/tawasol/medic), 'User Name' (admin), 'Password' (password), and 'Tawasol Id' (admin). Below these is a 'Connect and Synchronize' section with dropdowns for 'Default Priority Level', 'Default Security Level', 'Default Organization', and 'Default Type'. There are also checkboxes for 'Default Entry Type' (Paper, Electronic) and 'Internal Type' (Personal, Departmental). A 'Save' button is at the bottom.

- ▶ Then click on Connect and synchronize button.

- then user enters document information and then click "Save" button to show you the Microsoft Word message that means the document templates will be uploaded to the desktop as shown below:

**NOTE:**

- If you click "Yes" button, Microsoft Word will create a new folder containing the templates and for reach the templates, follow these steps:

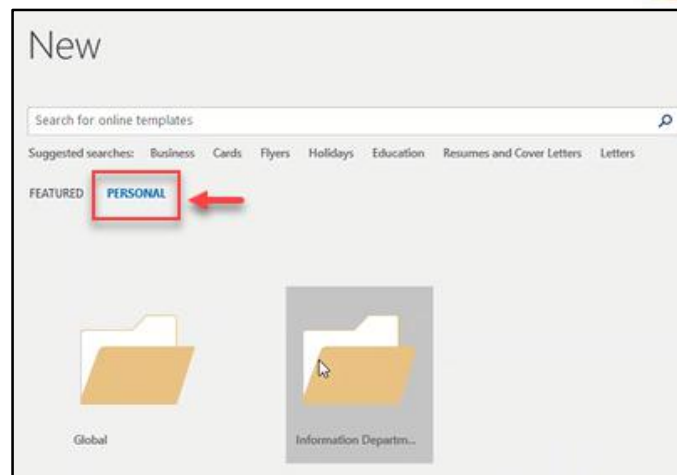
- Click on "file" menu.



- Click on "new" queue.




- And then click the "personal" button to browse the uploaded templates and select the appropriate fold as shown below:

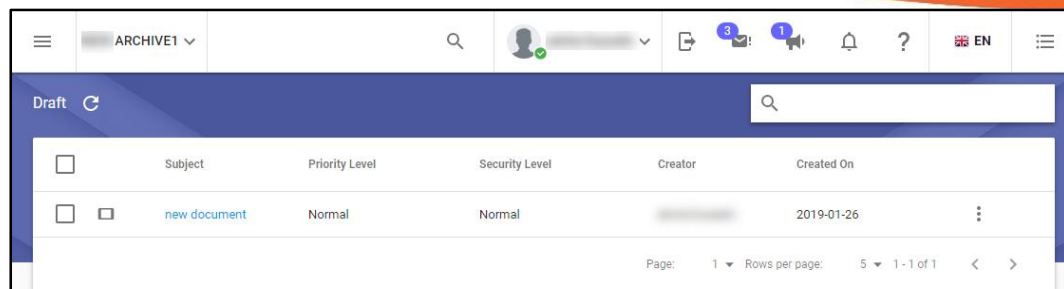
**NOTE:**

- ◀ If the user follows more than one department, a folder will be created for each department followed by it and the global folder will contain all the shared templates.

3.2 Send

- ◀ The user then prepares the content of the document and then click "Send" icon. 
- ◀ Enter the document information and click "Save" button as shown below:


- ◀ If you click "Save", the document will be saved on TAWASOL in the draft screen if it is outgoing or internal but if it is incoming, it will be saved with a review screen as shown in the following form:



- ▶ The document can be sent to other user by clicking "Launch Workflow" to submit it and specifying the user name and the administrative unit as shown in the following figure:

- ▶ Then you need to enter the organization unit and choose the user the recipient of the document and then click "send" as shown in the following figure:

**NOTE:**

- ▶ You can edit the document's content and save the changes by clicking on Save button unless the document is not approved yet.
- ▶ The electronic documents will not be saved if one the following mandatory fields not exist:
 - ▶ Full serial
 - ▶ Sign box
 - ▶ Document Subject
 - ▶ Approver date
- ▶ When save the document without the merged fields , the wrong icon will appears 
- ▶ system allows you to send for many users if is paper document only as shown below:



Full Name	Address	Contact
	Select Address	Select Address
	Select Address	Select Address

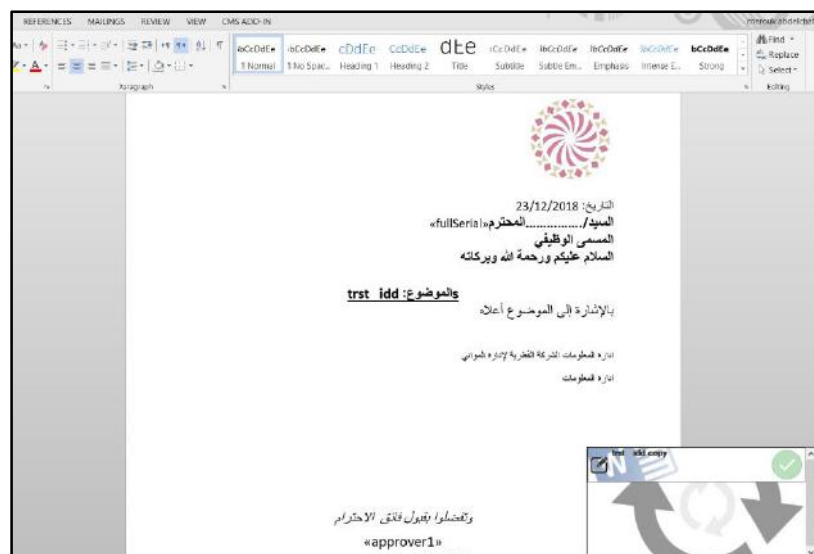
Buttons: Send, Previous, Cancel

4 Edit in desktop

- ◀ TAWASOL system allows to users to edit the content of the document through Microsoft Word on your personal computer and after the user modify and edit the content and save the changes from Microsoft word, the modifications are saved on desktop and on the system.
 - ◀ User should first perform this following steps when select Edit in desktop:
1. User will select edit from the step processor then select “Edit in desktop” from the list for any electronic document not approved yet.



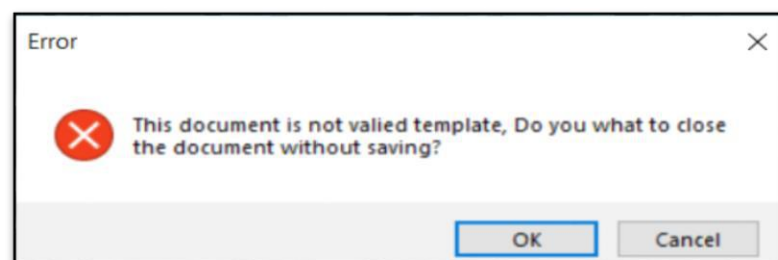
2. When select “Edit in Desktop” from the system , the document’s content will be opened on the user’s personal computer via microsoft word as shown :



3. User will edit the content of the document then click on save from Microsoft word to save the changes successfully after close the file .

Notes :

- ▶ In case user check the check box of validate template from the settings screen, the mandatory fields are checked and if the content is missing one of this mandatory fields in the template a warning message will appears to close the document without saving or returning for modification .




- ▶ You can edit only the electronic outgoing and internal document from the desktop for the document that have not been approved yet.
- ▶ The content of the document can be opened from the user's desktop without modifying it when select "View" action from the step processor then select "View In Desktop Editor" From the list to display the content only.





5 Create a paper document through Microsoft Outlook

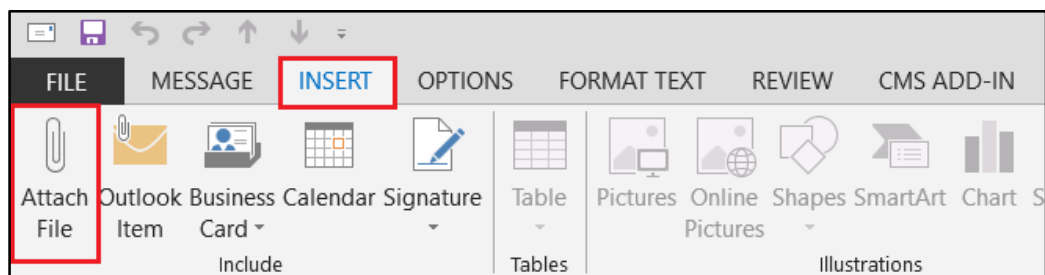
- ▶ The user can add a new document through Microsoft Outlook with the possibility of inserting attachments
- ▶ When user create document from Outlook, you should follow the following steps:
 - First, setup the tool on your personal computer
 - Open Microsoft Outlook then click on New Email
 - Click on CMS Add-in tab
 - Click on Configuration page icon 
 - ▶ When click on Configuration page icon, you should enter the following mandatory fields:
 - Server URL
 - Enter the username and password
 - Enter TAWASOL Id then click on Connect button
 - Determine the information of the document as shown in the following figure:

- ▶ The name of the document is specified in the subject field.

- ▶ The data of the document will be saved from Add New draft screen.

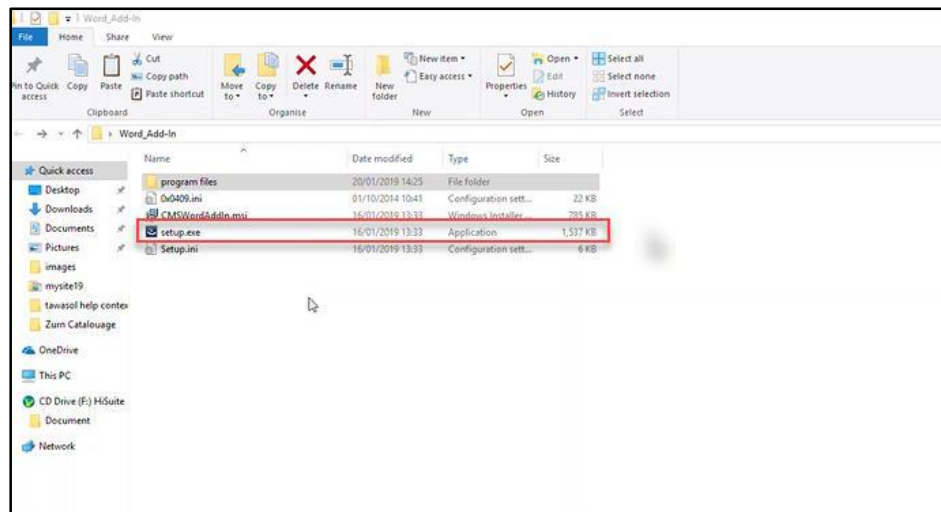
Notes:

- ◀ In case you add an outgoing or internal document, it will be saved in TAWASOL system in Draft screen.
- ◀ In case you add an incoming document, it will be saved in Review screen.
- ◀ You can insert any type of attachments with the document through the Attach file icon.

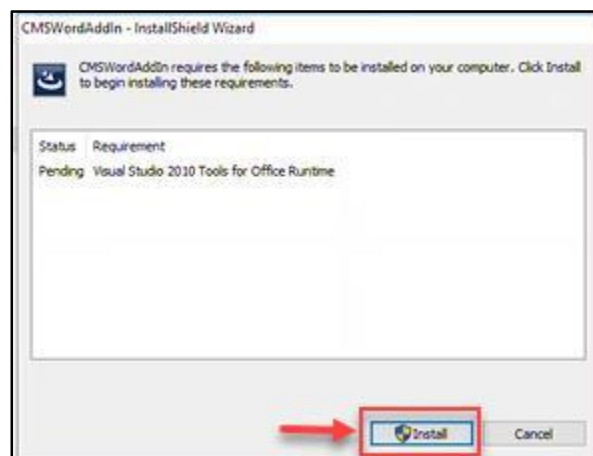


6 Add-In Setup

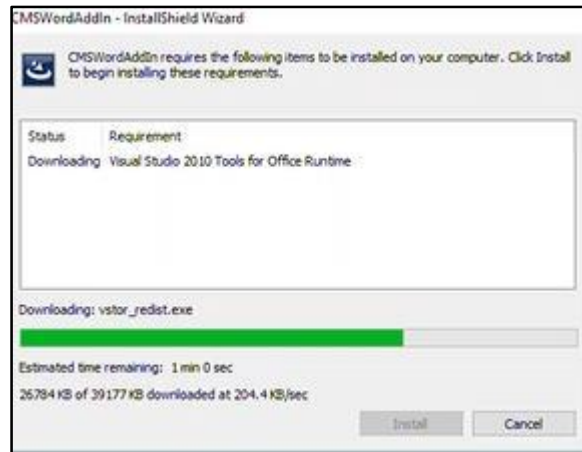
- ◀ You must first double-click the “setup exe” file as shown below:



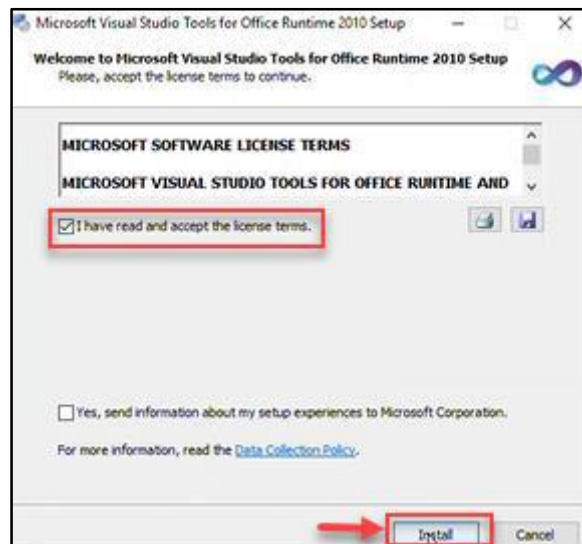
- ◀ After that, you will find installation tool screen and you should click the “Install” button as shown below:



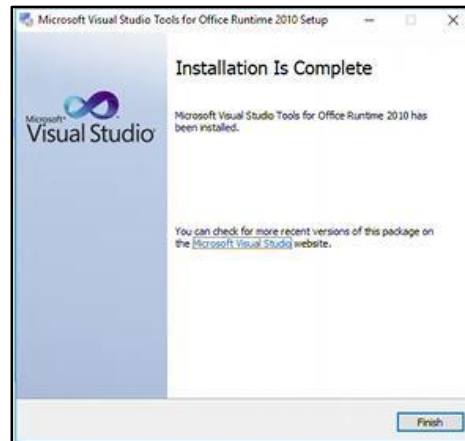
- ◀ After you click “Install” you must wait until the tool finishes installation as shown below:



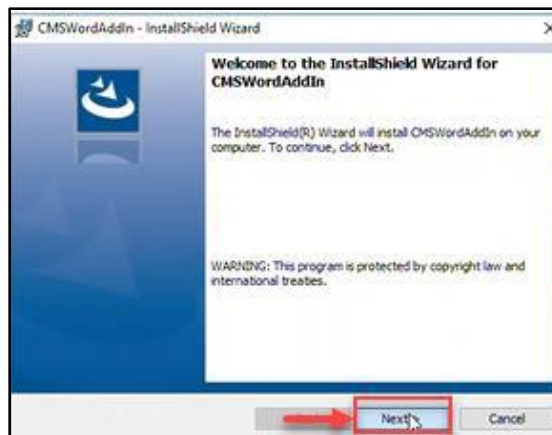
- Then you have to mark on “ I have read and accept the license terms” of and click the “Install” button as shown below:



- The tool has been successfully installed and you just have to click on "Finish" button to activate the tool and moving the tool integration process with the TAWASOL as shown below:



- ▶ You must start the integration steps by clicking “Next” button as shown below:



- ▶ Then click on “Finish” button to end the merge process and start using the feature as shown below:



