



DE SMART



SIMIS Office Automation System

Tutorial on SIMIS OA System





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01

Get Started - Login



Login



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Login on PC:

Please visit <https://oa.simis.cn>

Chrome , Firefox, Edge are supported.

Then login with the following information:

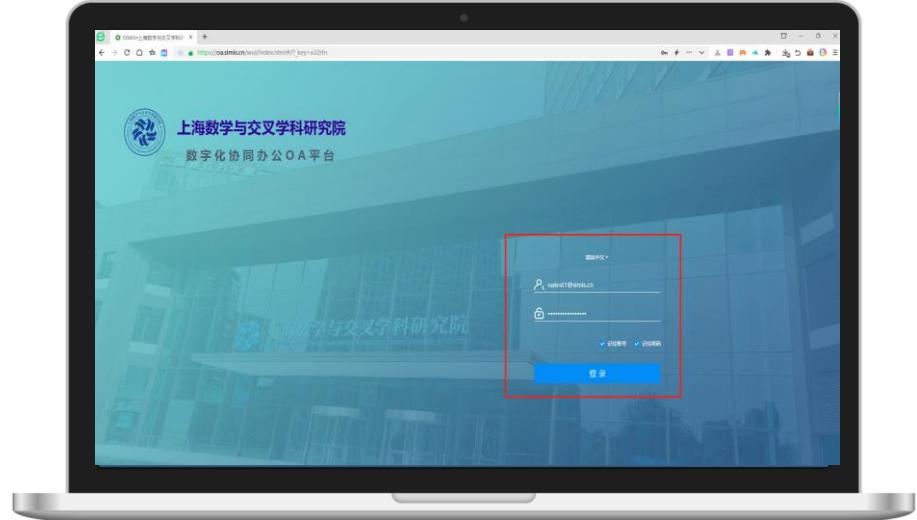
Username: **SIMIS email address** (with suffix)

Initial Password: **Simis+<the last 6 characters of your identity ID>**

For example, if my ID was 25839572, my initial password could be

Simis839572

It's recommended to change the password on the first login.



There are at most 9 trials per day if you had entered a wrong password.

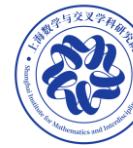


It's required to change password on the first login.

Password Format: a string no less than 8 characters with digits, upper and lower cases.

The screenshot shows a web browser window for the Shanghai Institute for Mathematics and Interdisciplinary Sciences (SIMIS) password change interface. The URL is https://oasimis.cn/wui/index.html#/?_key=cy4qdn. The page title is "密码设置" (Password Setting). On the left, there is a watermark of the SIMIS logo and text: "上海数学与交叉学科研究院" and "数字化协同办公 OA 平台". A red box highlights a tooltip message: "Changing Password is needed on the first login". Red arrows point from this text to the "Confirm" and "Cancel" buttons of a small modal dialog box that appears over the watermark. The modal contains the text "首次登录需修改密码!" (Password change required on first login) and buttons for "确认" (Confirm) and "取消" (Cancel). To the right of the modal, the main form fields are visible:

- Old password:** (redacted)
- New password:** (redacted)
Strength meter: 强
- Confirm new password:** (redacted)
- Verification code:** 7250 (redacted)
- Save** button (blue)



You will arrive the home page as follows

The screenshot shows the SIMIS Employee Portal homepage at https://oa.simis.cn/wui/index.html#/main/portal/portal-3-1?menuIds=0,3&menuPathIds=0,3&_key=ww1wne. The page features a top navigation bar with links for门户 (Portal), 人事 (Human Resources), 微搜 (Micro Search), 知识 (Knowledge), 流程 (Process), and a search bar. On the right, there are icons for AI, translation, and various system functions, along with a user account dropdown.

The main content area includes:

- 快捷入口 (Quick Access):** Icons for 用印 / Seal, 合同 / Contract, 采购 / Purchase, 差旅 / Travel, 付款申请 / Payment, and 工作餐 / Meal, each with a corresponding label below it.
- 统一待办 (Unified Pending Tasks):** A section showing tabs for 待办 (Pending), 待阅 (Pending Review), 关注 (Follow), 抄送 (Carbon Copy), and 已办 (Completed). It displays a message: 暂无数据 (No data available).
- 日程 (Schedule):** A calendar view for May 2025, showing dates from 04 to 10. The 6th is highlighted with a blue circle. Below the calendar, there is a message: 暂无日程 (No schedule available).
- 通讯录 (Address Book):** A search bar labeled "搜索姓名/首字母/手机号" (Search by name/initial letter/mobile number) and buttons for 最近 (Recent), 同部门 (Same department), and 我的下属 (My subordinates).

In the center of the page, there is a large button labeled "登录到PC端首页" (Log in to PC end homepage).



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02

Home Page



The appearance may change a little along the development.

App Menus

Quick Search

Quick Access

More Quick Access Menus

Calander

Board Menus

Workflows and Todos

Contacts

The screenshot displays the SIMIS Home Page interface. On the left, there is a vertical sidebar titled "SIMIS" with a search bar for "Employee...". The main content area includes:

- App Menus:** Located at the top left, with arrows pointing to the "Portal" and "Workflow" icons.
- Quick Search:** A search bar at the top right with the placeholder "Please enter a keyword to search".
- Quick Access:** A row of icons for "用印 / Seal", "合同 / Contract", "采购 / Procurement", "差旅 / Travel", "付款申请 / Payment", "工作餐 / Working Meal", "更多应用" (More Applications), and "自定义设置/Custom Settings".
- Workflow Center:** A section showing a workflow item: "2025-09-04 - 18F Auditorium-2025级新生开学典礼" assigned to "Tianshuo LI" on "2025-07-16".
- More Quick Access Menus:** A dropdown menu visible on the right side of the header.
- Calander:** A calendar view for July 2025, showing the 24th highlighted in blue.
- Contacts:** A contacts list with entries for "Nann..." (Administration Department YG0008) and "Xinjin..." (Information Technology D... YG0007).



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03

General Workflow



Definition: A workflow is a representation of a business logic in the OA system.

We convert ordinary paper works to OA workflows so that they can be treated in standard ways, and less error prone.

On the following slides, we will show

- * How to create a workflow.
- * How to trace your workflows.
- * How to edit your workflows.



Change Language



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SIMIS

Employee...

Portal Workflow Please enter a keyword to search

Quick Access

用印 / Seal 合同 / Contract 采购 / Procurement 差旅 / Travel 付款申请 / Payment 工作餐 / Working Meal

Workflow Center

Pending Awaiting Focus CC Handled

2025上半年o365追加订单付款 Junfei YANG 2025-08-15

采购需求申请-BOSS直聘升级VIP账户 Xinjing ZHAO 2025-07-25

暂借款-工作电脑代采购预支款 Junfei YANG 2025-07-25

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31

No Agenda

+

Contacts

1

CN EN JY Junfei YANG

JY Junfei YANG IT research and...
Shanghai Institute of Mathe...

Language English

Personalization

Password Settings

Theme Center

Change Layout

Logout

week biwe... month

< August 2025 >

Sun Mon Tues Wed Thur Fri Sat

10 11 12 13 14 15 16

No Agenda

+

Contacts



Create a Workflow – step 1



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The screenshot shows the SIMIS portal interface. A red box labeled '1' highlights the 'Portal' button in the top navigation bar. Another red box labeled '2' highlights the 'Process' button in the main menu grid.

Portal

Process

Academic Conference

Vacation

HR

Search

Knowledge

Supplier

Contract

Pending Awaiting Focus CC Handled

2025上半年o365追加订单付款*	Junfei YANG	2025-08-15
采购需求申请-BOSS直聘升级VIP账户	Xinjing ZHAO	2025-07-25
暂借款-工作电脑代采购预支款	Junfei YANG	2025-07-25

Payment 工作餐 / Working Meal

更多应用 自定义设置/Custom Settings

Calendar

week biwe... month

< August 2025 >

Sun Mon Tues Wed Thur Fri Sat

10 11 12 13 14 15 16

No Agenda

Contacts



Create a Workflow – step 2



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1

New Wor...

2

Financial workflow(5)

- Travel Expense Reimbursement Form
- Payment Application Form
- Work Meal Approval Form
- Reception and Hospitality Application Form
- External Personnel Payment Application Form

Budget Related Workflow(1)

- Department Budget Application

Contract Related Workflow(3)

- Contract Signing Approval
- Addition of Supplier Information
- Supplier Information Change

Holidays and attendance(4)

- Overtime Application Form

Procurement Related Workflow(3)

- Purchase Request
- Procurement Process Record
- Framework Contract Purchase Order

Sealing Related Workflow(1)

- Stamping Application Form

SIMIS

To Do List

Handled ...

My Reque...

Followed ...

Workflow...

Search

Process

Workflow

Please enter a keyword to search

JY Junfei YANG

JA EN CN



Fill in the Form



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SIMIS - Shanghai Institute | Create - Travel Expense Reimbursement Form | 新建标签页 | OA Usage Tutorial - Zoom | 新建标签页

<https://oa.simis.cn/spa/workflow/static4form/index.html?rdm=1755257138712#/main/workflow/req?iscreate=1&workflowid=147&isagent=0&beagenter=...>

Workflow :Create - Travel Expense Reimbursement Form - Create

Workflow Form (highlighted with red box) Workflow Chart Process Status

Submit Save

Travel Expense Reimbursement Form

1. Allowance for meals is reimbursed according to the domestic and international travel reimbursement standards, or at a flat rate of 100RMB per person per day based on the number of calendar days on the trip. Only one reimbursement method can be selected each time.
2. Allowance for local transportation is reimbursed based on receipts, or at a flat rate of 80RMB per person per day based on the number of calendar days on the trip. Only one reimbursement method can be selected each time.
3. If accommodation and meals are arranged or provided by the organizing unit, meal allowances and local transportation allowances will not be reimbursed during meetings and trainings.

Application Information

Title	Application Date
Travel Expense Reimbursement Form-Junfei YANG-2025	2025-08-15
Name of Traveler	Department Of Traveler
Junfei YANG	Information Technology Department
Rank	Academic Events
Funding Category	



SIMIS

Process Workflow Please enter a keyword to search

Junfei YANG

My Request

All	All	Not Archived	Archived	Unread	Feedback	My Followers
Financial workflow	Workflow Title	Affiliated Path	Created Date	Current Node	Users (W/O Action...)	
Travel Expense Reimbursement	2025上半年o365追加订单付款*	Payment Application Form	2025-08-15 14:03:36	Ticket Paste Sheet Printing	Junfei YANG	
Payment Application Form	Reception - Zhao (Created By :Junfei YANG, Created Date :2025-08-14, Handler :Junfei YANG)	Reception and Hospitality Application Form	2025-08-14 15:16:50	Department Leader Approval	Leonardo Santilli	
Reception and Hospitality Application Form	Travel Expense - to BIMSA	Travel Expense Reimbursement Form	2025-08-14 14:38:38	Department/Project Leader Approval	Leonardo Santilli	
Procurement Related Workflow	2025-07-28 - 1710-Classroom-The Thermodynamics of Chaos	Meeting Room Reservation	2025-07-28 07:05:14	结束		
Purchase Request	2025-08-20 - 1710-Classroom-The Thermodynamics of Chaos	Meeting Room Reservation	2025-07-28 06:57:01	结束		
Sealing Related Workflow	2025-08-19 - 1710-Classroom-The Thermodynamics of Chaos	Meeting Room Reservation	2025-07-28 06:42:56	结束		
Stamping Application Form	加班申请单-杨俊飞-2025-07-25	Overtime Application Form	2025-07-25 16:25:07	归档		
Meeting-related procedures	暂借款-工作电脑代采购预支款	Payment Application Form	2025-07-25 09:04:39	Ticket Paste Sheet Printing	Junfei YANG	
Meeting Room Reservation						
Holidays and attendance						
Overtime Application Form						

11 records in total

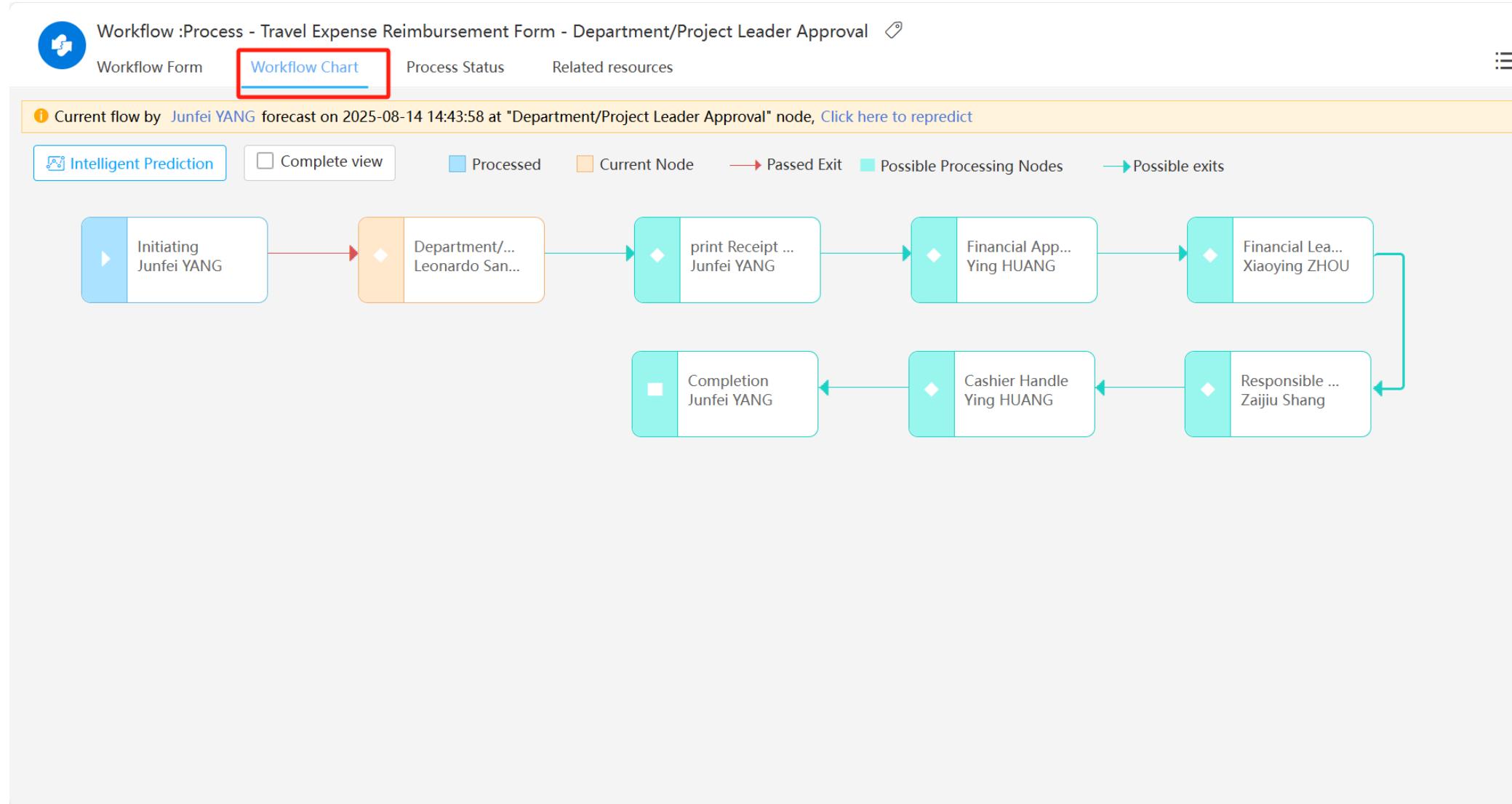
Batch follow Advanced Search



Trace Your Workflow 2



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Proceed further



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Workflow :Process - Payment Application Form - Ticket Paste Sheet Printing P202500089

Workflow Form **Workflow Chart** Process Status Related resources

Intelligent Prediction Complete view

Processed Current Node Passed Exit Possible Processing Nodes Possible exits

Initiating Junfei YANG → Department/... Xinjing ZHAO → **Ticket Paste S... Junfei YANG** → Financial appr... Ying HUANG → Financial Lea... Xiaoying ZHOU → Responsible ... Zaijiu Shang

Approve Reject Save Print

Workflow :Process - Payment Application Form - Ticket Paste Sheet Printing P202500089

Workflow Form **Workflow Chart** Process Status Related resources

Approve Reject Save Print

Payment Application Form

Operation Steps:
Step 1: Click **Print** button to print out Receipts Paste Sheet. Please hand over them to Finance Department on time after sorting and pasting all receipts on the sheet.
Step 2: Click **Submit** button to continue this workflow.

Application Information

Title 2025上半年o365追加订单付款	Application Date 2025-08-15
Applicant Junfei YANG	Application Department Information Technology Department
Payment Type Other Payment	
Associated Pre-Procurement Process	
Description	

When a workflow comes to your turn, you need to proceed on it push it on.

◆ **Approve**: When you agree with the previous steps. And the workflow will go on;

◆ **Reject**: When you do not agree. And the workflow will return to previous nodes;

◆ **Save**: You can input your opinions but temporarily save it and decide later;

◆ **Print**: Just print the form;

◆ **⋮**: More menus.

- * When a workflow is clicked, the form is opened in a new browser tab. You may manually close the tab or switch to the old tab.
- * Do not share your account with others.



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04

Typical Cases



SIMIS

Process Workflow Please enter a keyword to search

New Workflow Junfei YANG

To Do List Favorites

New Wor... Handled ... My Reque... Followed ... Workflow... Search

Travel Expense Reimbursement

Financial workflow(5)

- Travel Expense Reimbursement Form
- Payment Application Form
- Work Meal Approval Form
- Reception and Hospitality Application Form
- External Personnel Payment Application Form

Meeting-related procedures(2)

- Meeting Room Reservation
- Conference Budget / Final Accounts Form

Budget Related Workflow(1)

- Department Budget Application

Contract Related Workflow(3)

- Contract Signing Approval
- Addition of supplier information
- Supplier information change

Holidays and attendance(4)

- Overtime Application Form
- Leave Request Form

Procurement Related Workflow(3)

- Purchase Request
- Procurement Process Record
- Framework Contract Purchase Order

Sealing Related Workflow(1)

- Stamping Application Form



Travel Expense Reimbursement



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When a faculty/staff takes a business trip, and will refund the cost afterwards.



SIMIS

Process Workflow Please enter a keyword to search Junfei YANG

New Workflow Favorites

Payment Application

Financial workflow(5)

- Travel Expense Reimbursement Form
- Payment Application Form
- Work Meal Approval Form
- Reception and Hospitality Application Form
- External Personnel Payment Application Form

Meeting-related procedures(2)

- Meeting Room Reservation
- Conference Budget / Final Accounts Form

Budget Related Workflow(1)

- Department Budget Application

Contract Related Workflow(3)

- Contract Signing Approval
- Addition of supplier information
- Supplier information change

Holidays and attendance(4)

- Overtime Application Form
- Leave Request Form

Procurement Related Workflow(3)

- Purchase Request
- Procurement Process Record
- Framework Contract Purchase Order

Sealing Related Workflow(1)

- Stamping Application Form



When a faculty/staff buys some equipment, or to pay for some activities.

To pay some visiting scholars for remuneration.

It is for all payments other than refunding business trips.



Work Meal Approval



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SIMIS

Process Workflow Please enter a keyword to search

New Workflow Junfei YANG

To Do List Favorites

New Wor... Handled ... My Reque... Followed ... Workflow... Search

Work Meal Approval

Financial workflow(5)

- Travel Expense Reimbursement Form
- Payment Application Form
- Work Meal Approval Form
- Reception and Hospitality Application Form
- External Personnel Payment Application Form

Budget Related Workflow(1)

- Department Budget Application

Contract Related Workflow(3)

- Contract Signing Approval
- Addition of supplier information
- Supplier information change

Holidays and attendance(4)

- Overtime Application Form
- Leave Request Form

Procurement Related Workflow(3)

- Purchase Request
- Procurement Process Record
- Framework Contract Purchase Order

Sealing Related Workflow(1)

- Stamping Application Form



Work Meal Approval



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This is for work meals with only SIMIS faculties/stuffs. one shall apply for the approval in advance.

For guests, it is to use the Reception and Hospitality Application Form.



Accommodation Approval



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SIMIS

Process Workflow Please enter a keyword to search

New Workflow Junfei YANG

To Do List Favorites

New Wor... Handled ... My Reque... Followed ... Workflow... Search

Accommodation Approval

Financial workflow(5)

- Travel Expense Reimbursement Form
- Payment Application Form
- Work Meal Approval Form
- Reception and Hospitality Application Form
- External Personnel Payment Application Form

Budget Related Workflow(1)

- Department Budget Application

Contract Related Workflow(3)

- Contract Signing Approval
- Addition of supplier information
- Supplier information change

Holidays and attendance(4)

- Overtime Application Form
- Leave Request Form

Procurement Related Workflow(3)

- Purchase Request
- Procurement Process Record
- Framework Contract Purchase Order

Sealing Related Workflow(1)

- Stamping Application Form



Reception Approval



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When a faculty/staff wants to pay for a visitor's meal/hotel (with some fund), one shall apply for approval in advance.



External Personal Payment Application



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External Personal Payment Application

New Workflow

All Favorites

Financial workflow(5)

- Travel Expense Reimbursement Form
- Payment Application Form
- Work Meal Approval Form
- Reception and Hospitality Application Form
- External Personnel Payment Application Form

Budget Related Workflow(1)

- Department Budget Application

Contract Related Workflow(3)

- Contract Signing Approval
- Addition of supplier information
- Supplier information change

Holidays and attendance(4)

- Overtime Application Form
- Leave Request Form

Procurement Related Workflow(3)

- Purchase Request
- Procurement Process Record
- Framework Contract Purchase Order

Sealing Related Workflow(1)

- Stamping Application Form

External Personal Payment Application

New Workflow

All Favorites

Financial workflow(5)

- Travel Expense Reimbursement Form
- Payment Application Form
- Work Meal Approval Form
- Reception and Hospitality Application Form
- External Personnel Payment Application Form

Budget Related Workflow(1)

- Department Budget Application

Contract Related Workflow(3)

- Contract Signing Approval
- Addition of supplier information
- Supplier information change

Holidays and attendance(4)

- Overtime Application Form
- Leave Request Form

Procurement Related Workflow(3)

- Purchase Request
- Procurement Process Record
- Framework Contract Purchase Order

Sealing Related Workflow(1)

- Stamping Application Form



External Personal Payment Application



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When a faculty/staff wants to apply remuneration for some visitors



More



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SIMIS

Process Workflow Please enter a keyword to search Junfei YANG

New Workflow All Favorites JA LA

New Workflow

Financial workflow(5)

- Travel Expense Reimbursement Form
- Payment Application Form
- Work Meal Approval Form
- Reception and Hospitality Application Form
- External Personnel Payment Application Form

Meeting-related procedures(2)

- Meeting Room Reservation
- Conference Budget / Final Accounts Form

Budget Related Workflow(1)

- Department Budget Application

Contract Related Workflow(3)

- Contract Signing Approval
- Addition of supplier information
- Supplier information change

Holidays and attendance(4)

- Overtime Application Form
- Leave Request Form

Procurement Related Workflow(3)

- Purchase Request
- Procurement Process Record
- Framework Contract Purchase Order

Sealing Related Workflow(1)

- Stamping Application Form



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* Seminar/Conference Reservation

* ...

*More components will be released in the future.
While currently the financial components are generally enough.*



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05

Mobile App



Mobile App



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**For mobile App, it's to look for "EMobile7" in the App store. Install it, and connect to
the URL <https://oam.simis.cn>**

We will describe more on this in the next tutorial.



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Thank you

Questions \>



Questions

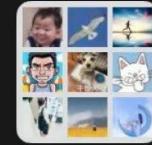


DE SMART

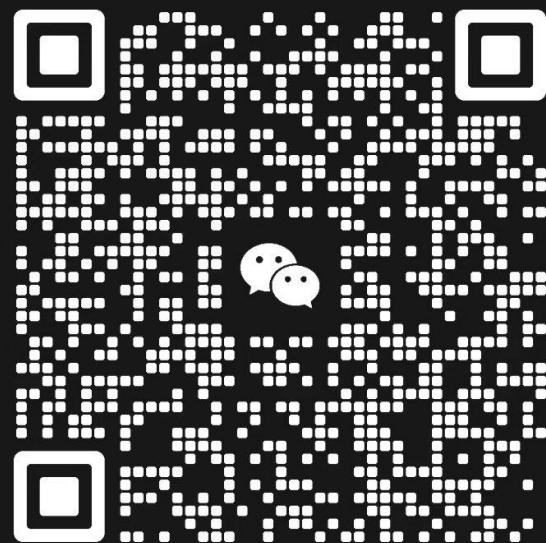
For more questions, please send email to

yangjunfei@simis.cn

or message in the SIMIS-IT-Helpdesk wechat group.



群聊：SIMIS-IT-helpdesk



该二维码7天内(8月21日前)有效，重新进入将更新