Functionality description per module in SYMFONI

Below is a further explanation of each standard module/client application on a functionality basis:

<u>Configuration</u>

Enables administrators and super users to set default criteria and functionality for licensed users across the other modules. These settings include:

- ✓ Maintaining user role designations and permissions for each of the available modules by creating, editing and removing users.
- ✓ Creating, activating and de-activating users within modules.
- ✓ Maintaining access groups.
- ✓ Miscellaneous system settings

<u>Contacts</u>

Connections and Companies make up the Contacts module. A Connection is a person who is connected to a company and can also be designated as internal or external. A Company is an entity which can have departments and connections, a designation which also includes employees.

Common functionality:

- ✓ Seldom used Connections and Contacts can be moved to history so that they are still available within the module, but are not visible on a daily basis. This helps to create ‘cleaner’ views for users who have many items.
- ✓ Trash is a ‘soft delete’ whereby the item is meant for permanent removal from the module but this must be done by designated administrator. If users accidently delete an item, they can go to the trash can and restore the item to its original location.
- ✓ Pre-defined specified searches are available in addition to doing a full-text search. For example, by responsible, by category, by segment, by trade, etc.
- ✓ It is possible to include multiple entries for contact details and address information in a configurable manner for Connections and Companies. For example, a mobile number, a home number, a home address, a visitor address, a primary address, etc.
- ✓ It is possible to include additional information regarding a Connection and a Company in a user configured manner. The level of flexibility is dependent upon how the system administrator has configured the system with keywords though there is the possibility to include free text as the value.
- ✓ For a connection or a company it is possible to get a list of all related documents and correspondences.

Connections functionality:

- ✓ Standard inputs include name, position, email address, relationship owner and the current status of the relationship.
- ✓ Personal categorization is possible and is used to classify if someone is in a particular group or what their personal interests include.
- ✓ For a more personalized effect, it is possible for a connection to include a picture of themselves and this picture is then available when previewing that Connection

- ✓ Any connection can be registered as a user. Connections belonging to an external company will be working as external users when registered. External users are only able to read items where they are included in the access list.
- ✓ Connections can be put into groups (= mail groups) available when selecting recipient of a correspondence.

Company functionality:

- ✓ Standard inputs include name, country, tax number, relationship owner and the current status of the relationship.
- ✓ Categorization is possible and is used to classify if the company is in a particular group or category and what the trade or business segment regards.
- ✓ It is possible to identify related companies and list these together as a reference for other users
- ✓ Access rights are strict security settings which either allow or restrict the actions of other users. A range of settings are available – from limited access (reader) to full access (complete rights) and are set by the system administrator.

Dashboard

Designed as a home page, users can get a quick overview of the most important items as their starting point.

- ✓ 'My' items include folders, documents, correspondences or activities that you have created yourself plus items where you have explicit access rights to the information.
- ✓ 'All' items include folders, documents, correspondences or activities that are either unrestricted or where you have explicit access rights to the information.
- ✓ Create new items directly from the dashboard.
- ✓ The user can customize the dashboard by selecting among all available views.
- ✓ Actions such as open, move, copy, delete, etc. can be executed directly from the dashboard.

Folders

Managing information begins with having intuitive tools. Folders is designed to promote collaboration amongst users and team members while still maintaining high levels of security for confidential information.

Common functionality:

- ✓ Access rights are strict security settings which either allow or restrict the actions of other users. A range of settings are available – from limited access (reader) to full access (complete rights) and these can be applied to folders. The access rights to a folder will automatically be applied to all sub-folders, documents, correspondences and activities in the folder.
- ✓ It is possible to include a short description of the folder which is very useful when looking through a list of multiple items to ensure that the correct one is selected.

- ✓ Item links are visible whereby the user can highlight the link and copy/paste it to have a direct path back to the item.
- ✓ Use of keywords is possible to categorize the item and then tag it to similar items.
- ✓ Seldom used items can be moved to history so that they are still available within the module, but are not visible on a daily basis. This helps to create ‘cleaner’ views for users who have many items.
- ✓ Trash is a ‘soft delete’ whereby the item is meant for permanent removal from the module but this must be done by designated administrator. If users accidently delete an item, they can go to the trash can and restore the item to its original location.
- ✓ Various dates, such as created date, modified date, deadline and finish date, can be chosen to align with project milestones.
- ✓ Items that has got a deadline set, will show up in the dedicated ‘My deadlines’ panel, and get removed as soon as they have the finish date set.
- ✓ Pre-defined specified searches are available in addition to doing a full-text search. For example, by date, by type, by status, etc.
- ✓ Users can specify one or more items as their favorite. Items marked as a favorite will show in a shortlist ‘My favorites’ for quick access and also indicated to the user as having a distinct icon with a star.

Folders functionality:

- ✓ For documentation purposes and to assist project team members, it is possible to specify ‘involved’ people or companies in a folder. This is a separate function from setting access rights since ‘involved’ people or companies are generally used as reference points and are not involved in the daily use of the information.
- ✓ It is possible to include additional information regarding the folder in a user configured manner. The level of flexibility is dependent upon how the system administrator has configured the system with keywords though there is the possibility to include free text as the value.
- ✓ Designated users can save their folder structures (folders and sub-folders) as process templates so that they are then added into the database of process templates for use by others.
- ✓ The content of a folder can be downloaded as a ZIP file. The ZIP file will contain the original file content of the current version of documents. HTML files will be generated for plain text documents. The levels of sub-folders will be replicated into the zip file to ensure the structure is kept.
- ✓ The folders hold three options for how their content is viewed: hierarchical, flat list (documents, correspondence and activities separate) and Deadline.

Documents functionality:

- ✓ Depending upon access rights, a document can be previewed within the module, downloaded as a PDF, downloaded in the original file format or edited.
- ✓ Moving documents can be done in multiple ways. Within a folder or sub-folder, a user can drag and drop the documents to a different location. Alternatively, a user can move or copy the document to another folder (depending upon access rights).

- ✓ Documents can be sent as a link to recipients who are included as a contact, have a valid email address and have access rights to the document[1]. Alternatively, a user can copy/paste the link to share with the recipient.
- ✓ Documents can also be linked to various folders. It is an advantage to use this methodology because then any updates to the document will automatically be saved in all locations and not just the original location.
- ✓ Versioning allows for documents to be checked in or out, allowing users to retrieve previous versions and to continue to work from a selected point. Versioning is useful for documents that change over time and require updating, but it may be necessary to go back to or reference a previous copy.
- ✓ Comments can be added to a document by anyone with proper access rights and is a centralized place for team members to create a common dialog. The current author of a document will be notified of new comments if they specify this in their settings.
- ✓ Designated users can save their documents as content templates so that they are then added into the database of content templates for use by others.
- ✓ Documents can be added into the module without necessarily being assigned to a specific folder (as long as this option is set for the site). These are shown separately into the grouping of 'All documents without a folder' and a user can search through this group to find the necessary items.
- ✓ Multiple document formats are supported. For example, Adobe PDF, Microsoft Word, Excel and PowerPoint and standard image formats (JPEG, PNG) along with a built in text editor.

Correspondence

Contain functionality for creating, sending and storing a correspondence[2]. A correspondence can be best thought of as a way to make information and content from the Docs & Folders module available to any connection registered in the Contacts module. The user can also add random content directly into a correspondence by the use of an embedded editor and uploading files.

- ✓ A correspondence can be created in the context of a folder or subfolder. Otherwise a correspondence is just stored sequentially in a flat manner (if this option is set for the site).
- ✓ Sending a document or a link is evidenced by a correspondence.
- ✓ A correspondence can be imported from an email in Shared inbox.
- ✓ Emails stored in a user's mail client[3] can be copied into SYMFONI as correspondences by using the File Connector and drag-and-drop. This provides a simple way to share a received email with a number of users easily.
- ✓ Sending a correspondence marks it as sent and stores the time of sending as the sent date.
- ✓ Incoming correspondences can be replied to by the use of the Reply action or by referencing the incoming correspondence from an outgoing one.
- ✓ Journalizing a correspondence will assign a journal number to it and a journal date for when this took place. Journalized correspondence cannot be deleted.

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[1] A SMTP server is used for sending links and for sending a correspondence.

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[3] Mail clients supported for standard modules include Notes 8 and Outlook2007 or newer.

Activities

An activity contains information about a planned activity, or the result of a completed activity. The owner of the folder (subfolder) is the organizer (responsible) for the activity, but the activity can be assigned to another user. The icon of an activity change color when the status is changed (Planned=yellow, Ongoing=Green, Completed=Black, Overdue=Read).

Keywords

An innovative way to manage keywords across multiple modules with centralized steering. Designated users have access to the administrative module to establish and manage defaults values while keywords themselves can be used across a variety of modules. Keywords give the user the ability to sort content in a user-friendly, but structured manner.

- ✓ Flexible administrator options for adding, editing, deleting or setting various keywords as the default for users.
- ✓ Users can label items such as type, status, category by selecting the pre-defined keywords.
- ✓ Alternatively, users can create their own individual tags for items or they can select from a list of tags created by other users. This allows for a more personalized experience while still conforming to the company guidelines.

Search

While quick search is available throughout most modules, the search module itself allows a user to perform a more filtered look-up with full text within documents and folders.

- ✓ Ability to expand the search criteria to include descriptions, history, exact phrases or within content for documents.
- ✓ Search results combine all items into one results list to avoid performing multiple look-ups.
- ✓ Basic actions can be performed directly from the search results so that a user has a consistent workflow and can stay ‘in context’.
- ✓ Advanced search include the option to make more detailed searches per item type. The user can create and apply filters to get lists results based on the given criteria. I.e. list all documents created last year, that has been modified this year and is of type *Contract*

Templates

Templates allow a user to quickly include frequently used ‘frameworks’ to save time and to follow company guidelines for standardized processes. Similar to the keywords module, designated users have access to the administrative module to establish, manage and approve default templates while the templates themselves are used primarily within the Folders module.

- ✓ Process templates support business process ‘best practices’ within a company. A structure can quickly be applied which combines a folder/sub-folder structure with the necessary pre-defined documents for a specific activity. For example, this can be used to manage the process of hiring a new employee to ensure that all steps are taken and documented.
- ✓ Content templates provide the user with a specific structure for what information should be included in a document and how it should be formatted. For example,

these are often used during budget processes, minutes of meetings, presentations, contracts and so forth.

File Connector

The File Connector is installed as a separate application on the user's machine. The installation process is available on a Windows[4] PC which configures it to be automatically launched together with the operating system. For Macs running OSX the installation needs to be done manually following the simple guidelines provided. The File Connector functions as a specialized client for handling content in the format of files to the Folders module.

- ✓ Enables the "file edit function" from the web interface.
- ✓ Files can easily be saved as content for documents in the Folders module.
- ✓ Drag-and-drop of files is supported and will be stored as new documents in the selected folder. It is also possible to drag-and-drop a whole folder.
- ✓ Drag-and-drop of emails (Outlook and Lotus Notes) is supported and will be stored as new correspondence in the selected folder. Sender/recipients will be created as new connections if the mail address is not found amongst the contacts.
- ✓ Allows searching items based on the title.
- ✓ Open folders, subfolders, documents or correspondence directly in the Web interface from this client.
- ✓ Initiate editing documents straight from this client.
- ✓ Simple option for showing my favorites, or searching only 'my item' vs. 'all items' (Show mine/show all).
- ✓ Keep a list of recently edited files and allows for easily re-opening of these files for editing.

User settings

The user has different options of personal settings, f ex Language, Picture, Notifications, etc.

Integration

SYMFONI includes the feature to access the stored information in SYMFONI through an API. The API provides a developer to access and update information in SYMFONI, like documents and folders, in a restful manner. The API is documented in java doc format.

[4] As of 04.08.14 Windows 7/8 is the supported operating system for use with the File Connector.