

Actionable Emails

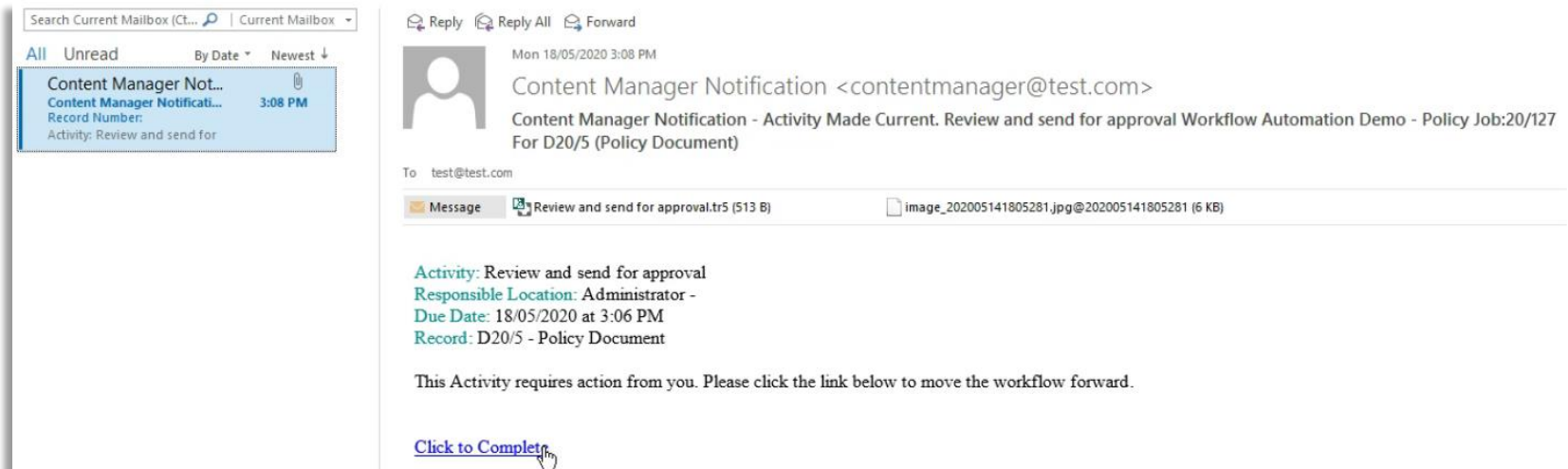
All things Information Management



Lisa Read White
Director, Proficiency Group Pty Ltd

Actionable emails?

- Content Manager sends emails as part of the Workflow process to alert relevant users that there is a task to complete.
- Actionable emails allows the task to be completed via the received email, simplifying the process to complete the task.
- We also call this **Click to Complete**



Search Current Mailbox (Ct... | Current Mailbox

All Unread By Date Newest ↓

Content Manager Not...
Content Manager Notificati... 3:08 PM
Record Number:
Activity: Review and send for

Reply Reply All Forward

Mon 18/05/2020 3:08 PM

Content Manager Notification <contentmanager@test.com>
Content Manager Notification - Activity Made Current. Review and send for approval Workflow Automation Demo - Policy Job:20/127 For D20/5 (Policy Document)

To test@test.com

Message Review and send for approval.tr5 (513 B) image_202005141805281.jpg@202005141805281 (6 KB)

Activity: Review and send for approval
Responsible Location: Administrator -
Due Date: 18/05/2020 at 3:06 PM
Record: D20/5 - Policy Document

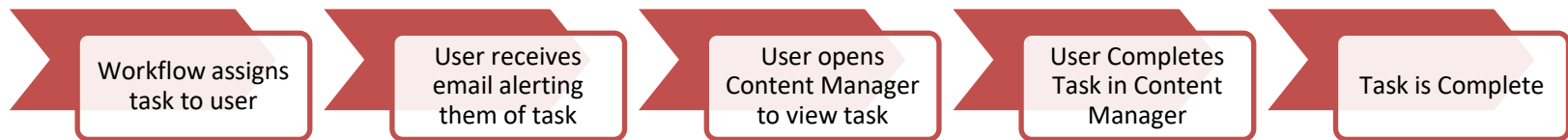
This Activity requires action from you. Please click the link below to move the workflow forward.

[Click to Complete](#)

Simplifying the Workflow Process

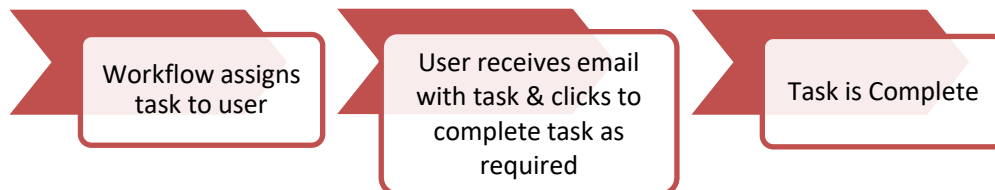
Current Process to Complete Workflow Task

Users are required to open Content Manager and view task to complete



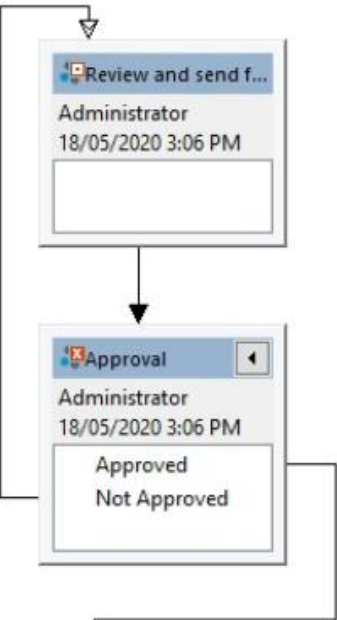
Process to Complete Workflow Task with Actionable Emails

User completes task within notification email



Configurable Activities

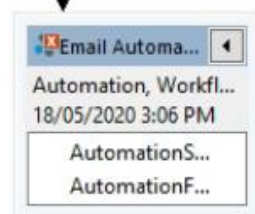
- Activities are dynamically generated from the workflow configuration
- If an activity has multiple results - choices are displayed



Review and send f...
Administrator
18/05/2020 3:06 PM

Approval
Administrator
18/05/2020 3:06 PM

Approved
Not Approved



Email Automa...
Automation, Workf...
18/05/2020 3:06 PM

AutomationS...
AutomationF...

Reply Reply All Forward



Mon 18/05/2020 3:08 PM

Content Manager Notification <contentmanager@test.com>

Content Manager Notification - Activity Made Current. Approval Workflow Automation Demo - Policy Job:20/127 For D20/5 (Policy Document)

To test@test.com

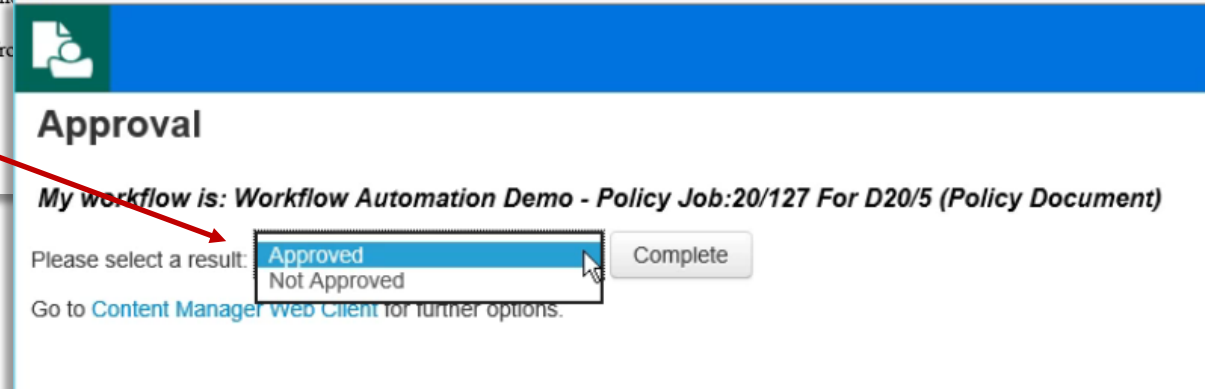
Message Approval.tr5 (453 B)

image_202005141805281.jpg@202005141805281 (6 KB)

Activity: Approval
Responsible Location: Administrator -
Due Date: 16/05/2020 at 1:00 PM
Record: D20/5 - Policy Document

This Activity requires action from

[Click to Complete](#)



Approval

My workflow is: Workflow Automation Demo - Policy Job:20/127 For D20/5 (Policy Document)

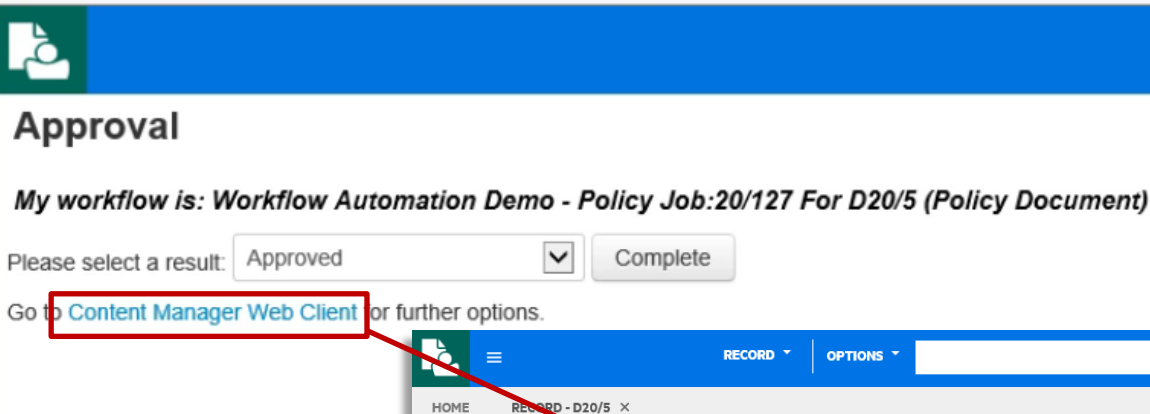
Please select a result: Complete

Go to [Content Manager web Client](#) for further options.

View Documents in Web Client

If a document is required to be viewed or edited prior to completion, a link is included in the Actionable Email:

- Click link to view relevant document
- Document opens in Web Client

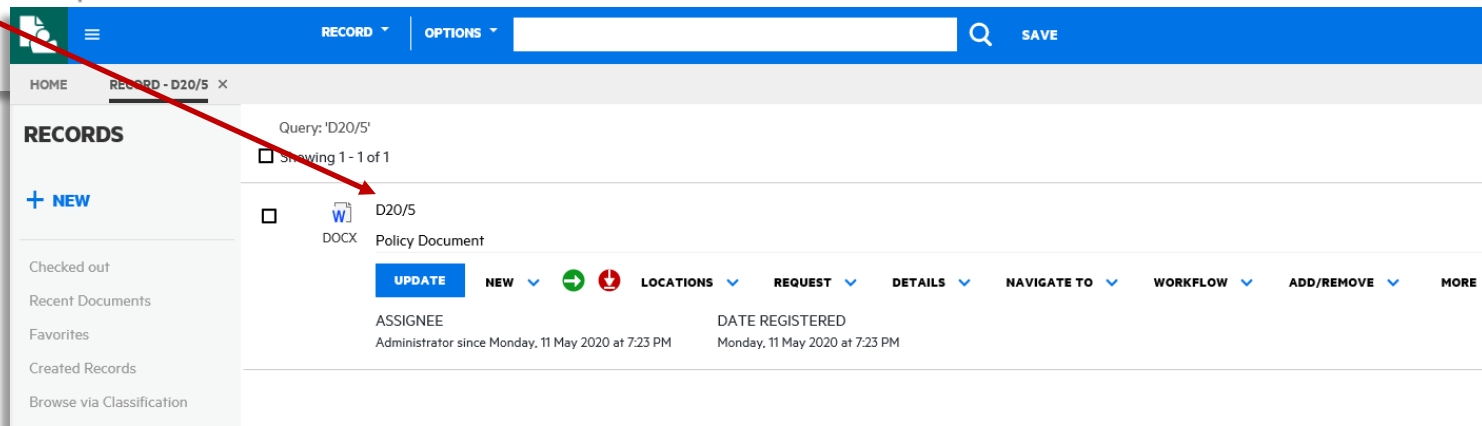


Approval

My workflow is: Workflow Automation Demo - Policy Job:20/127 For D20/5 (Policy Document)

Please select a result:

Go to [Content Manager Web Client](#) for further options.



RECORDS

Query: 'D20/5'

Showing 1 - 1 of 1

ASSIGNEE	DATE REGISTERED
Administrator since Monday, 11 May 2020 at 7:23 PM	Monday, 11 May 2020 at 7:23 PM

Task Completion Confirmation

Once a Workflow task is completed via the Actionable Email:

- A task completion confirmation is displayed
- This allows the user to confirm that necessary task is complete



Review and send for approval

My workflow is: Workflow Automation Demo - Policy Job:20/127 For D20/5 (Policy Document)

Complete

This workflow activity has been completed.



Approval

My workflow is: Workflow Automation Demo - Policy Job:20/127 For D20/5 (Policy Document)

Please select a result: Approved



Complete



Go to [Content Manager Web Client](#) for further options.

Any Questions?



INFORMATION | SIGMA
PROFICIENCY | DATA

Thank you!

Questions?

