
SMART business



SmartPoint DMS

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1. Introduction

The document outlines the improvements and changes in the functionality of the SmartPoint DMS solution that are included in the next regular upgrade 2024.10. The upgrade includes changes in functionality for the period from July 1, 2024 to September 30, 2024.

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2. Composition of SmartPoint DMS upgrades

The upgrade includes the following improvements, new functional capabilities, and bug fixes:

Nº	Content	Module	Type of change
1	The Annulment feature has been implemented, which allows the requestor to withdraw a document from the approval process at any stage. How it works: The requestor can annul the document at any point in the approval process by clicking on the [Annulment] button in the document card. This stops further approval of the document. After the document has been annulled, participants to whom the document was assigned for approval receive an automatic notification that the document has been withdrawn. Benefits: The annulment feature provides flexibility when the document needs to be corrected or is no longer relevant for further approval. It prevents participants from wasting time processing irrelevant documents and increases the efficiency of approval processes.	SPDMS Agreements SPDMS Internal documentation SPDMS External documentation	New feature
2	The function of collapsing and expanding individual information blocks in the document card has been added. This allows users to manage the display of information more flexibly. How it works: Users can collapse or expand individual blocks in the document card depending on their relevance to the current task. This allows users to reduce the amount of visible information and focus on the most important sections. Benefits: The block collapsing feature helps users avoid unnecessary information, making the interface more user-friendly and easier to navigate. This improves the efficiency of work with documents, allowing users to find the necessary data faster.	SPDMS Agreements SPDMS Internal documentation SPDMS External documentation	New feature
3	A separate tab 'Overdue tasks' in the task menu has been added. This allows users to quickly access tasks whose due dates have been missed. How it works: All tasks that were not completed by the deadline are automatically displayed in the new tab. It is located in the main tasks menu and allows users to view and	SPDMS Agreements SPDMS Requests (Payment)	New feature

	manage overdue tasks. This provides more effective control over executive discipline. Benefits: This feature allows managers and executors to easily track tasks requiring immediate attention, improving executive discipline and reducing the risk of untimely task completion.		
4	The 'Additional tasks' feature has been implemented. This feature is now available across all modules, allowing users to create separate subtasks within a main task for more effective work distribution. How it works: While working on a main task, users can create additional tasks that act as separate subtasks with their own deadlines, assignees, and scopes of work. This allows users to structure the process of performing tasks in greater detail, improving control and distribution of responsibility. Benefits: This feature simplifies the management of complex tasks by breaking them down into smaller, manageable stages. It provides better oversight of each element's execution, allowing for more efficient resource allocation and deadline management. This increases the productivity and responsibility of the performers.	SPDMS Agreements SPDMS Requests (Payment)	Enhanced feature
5	A new feature for sharing access to the document card has been implemented. This feature allows users to flexibly manage access rights to documents stored in the system. How it works: Users can share only-view access to the contents of a document card with other members. Copying or transferring of the document itself is no longer necessary. This process is managed through an access rights configuration system that provides control over who can view the information. Additionally, there is an option to revoke granted rights by unsharing the document. All actions are recorded on a separate tab. Benefits: This feature enhances document management efficiency and allows users to securely share information within the organization while maintaining control over access to confidential data.	SPDMS Agreements SPDMS Requests (Payment)	New feature

6	The feature of manual registration of the agreement card has been added. This allows users to assign an agreement number at a certain stage of the approval process, rather than immediately when creating a card. How it works: Users can create new agreement cards without the need to assign a number at the initial stage. The agreement number can be assigned later, at a stage when it becomes relevant to the process. Benefits: This feature provides greater flexibility in agreements management, allowing users to control process stages more accurately. It helps avoid situations where an agreement number is assigned, but subsequent changes in the process require adjustments, which can lead to confusion.	SPDMS Agreements SPDMS Internal documentation SPDMS External documentation SPDMS Requests (Payment)	New feature
7	The automatic assignment feature of the task to the participant who previously rejected this document (when the task is sent for execution again) has been implemented. How it works: According to the new solution, a task that was previously sent to a group and rejected by one of the participants is automatically assigned to the same employee (not the group) after the task is resubmitted to the approval process. This means that instead of reassigning to the entire group, the system considers the previous approval history. Benefits: This feature increases work efficiency by reducing the time needed for task reassignment, allowing participants already familiar with the context to resume task execution more quickly.	SPDMS Agreements SPDMS Internal documentation SPDMS External documentation SPDMS Requests (Payment)	Enhanced feature
8	The ability to add multiple files to the 'Main Files' section has been implemented. Users can now add more than one file to the 'Main Files' section when creating a document card. How it works: If a user adds more than one file to the 'Main Files' section when creating a document card, any previously added files are automatically moved to the 'File History' folder. Benefits:	SPDMS Agreements SPDMS Internal documentation SPDMS External documentation SPDMS Requests (Payment)	Enhanced feature

	This feature makes file management easier when creating documents, especially when users need to upload multiple important files simultaneously. It also helps maintain a file's change history, which helps better version control of documents.		
9	A spinner (load indicator) has been added. A loading indicator is now displayed during long-running operations in the system. How it works: The spinner activates when the system processes a request or loads data. This can include uploading large documents, processing complex queries, or updating data. Users see the indicator, which shows that the process is in progress. Benefits: The loading indicator improves user experience by providing information about the status of request processing. This helps to avoid user uncertainty by letting them know that the system is actively working on their request. This, in turn, increases satisfaction with the use of the system.	SPDMS Agreements SPDMS Internal documentation SPDMS External documentation SPDMS Requests (Payment)	Enhanced feature
10	Automated notifications sending in Microsoft Teams and Outlook to the participants to whom the task was delegated has been added. The message contains all the necessary information about the task and allows users to quickly make decisions directly from the message. How it works: When a task is delegated to another participant, the system automatically sends a message to them in Microsoft Teams and Outlook. The message includes the task title, description, deadline, and the name of the person who delegated it. The message has interactive buttons that allow user to immediately approve or reject the task without navigating to the SmartPoint system. Benefits: This feature significantly reduces decision-making time, making the task management process more convenient and faster. The team will always be aware of the current tasks' status, enhancing overall productivity and ensuring effective delegation and task execution control.	SPDMS Agreements SPDMS Internal documentation SPDMS External documentation SPDMS Requests (Payment)	New feature

11	The ability to send filtering results to the User's e-mail in Excel format has been added. This feature is implemented for the 'Documentation' section. How it works: Users input filtering parameters, and a report is generated. An [Excel] button becomes available. When the user clicks on the [Excel] button, a modal window appears to confirm sending the report via email appears. The report opens in Excel format. Benefits: This feature allows users to conveniently receive and process data in Excel format, simplifying information analysis and improving management processes by providing quick access to reports without manual data export.	SPDMS Foundation (Vendors Module)	New feature
12	Creation of Outgoing Document Cards from Tasks or Incoming Document Cards has been implemented. Users can create an outgoing document card directly from tasks or the incoming document cards using the [Create Outgoing Document] button. How it works: Users can click on the [Create Outgoing Document] button in the task section of the incoming documentation or in the incoming document card. This automatically initiates the process of creating a new outgoing document card, with relevant fields filled with information from the incoming document. A link to the document card is automatically added to the Linked Documents block for quick access. Benefits: This feature simplifies the process of creating outgoing documents, allowing users to quickly and conveniently transition from incoming documentation to outgoing without extra steps. It increases work efficiency by reducing data entry time and improving information accuracy. Users can focus on more important tasks, leading to an overall increase in productivity.	SPDMS External documentation	New feature
13	New Payments Section in the SPDMS Requests Module has been developed. This section allows users to automate the payment approval process. The module includes the function of creating a payment request upon receiving an invoice, which can be routed for approval through a special process. How it works:	SPDMS Requests (Payments Section)	New feature

	Upon receiving an invoice, users can create a payment request and send it through a separate approval route. Documents that require approval are automatically sent to the appropriate officials or departments according to the company's internal policies. All routes can be configured through a process builder. The module also allows recording both scheduled and actual payment dates. Benefits: This module allows users to automate the approval and payment process for invoices, significantly enhancing the efficiency of financial departments. Establishing approval routes according to internal company rules ensures that all documents are approved in a timely and proper manner. Recording scheduled and actual payment dates helps monitor financial flows and avoid payment delays.		
14	A new feature for visual display of the priority level of tasks in the task list has been added. A new feature visually indicates the priority level of tasks in the task list, with the highest priority tasks having an indicator. How it works: In the task list, a visual indicator appears next to the highest priority task. This allows users to quickly identify which tasks require immediate attention and organize their work accordingly. Benefits: The visual priority display function improves workflow management, enabling users to focus on the most important tasks. This enhances the efficiency and productivity of teamwork.	SPDMS Internal documentation SPDMS Requests (Payments Section)	New feature
15	The ability to set the main bank requisites has been added. The 'Main' checkbox can be activated for only one record. How it works: When attempting to add new requisites as main, a popup appears requesting confirmation of the change. Users can choose to keep the previous requisites as main or change them to the new ones. Benefits: This feature provides flexibility in managing bank requisites and allows users to quickly adapt to changes without losing important information.	SPDMS Foundation (Vendors Module)	Enhanced feature