



enate
SIMPLIFIED SERVICE AUTOMATION

V2020.1 Release Overview

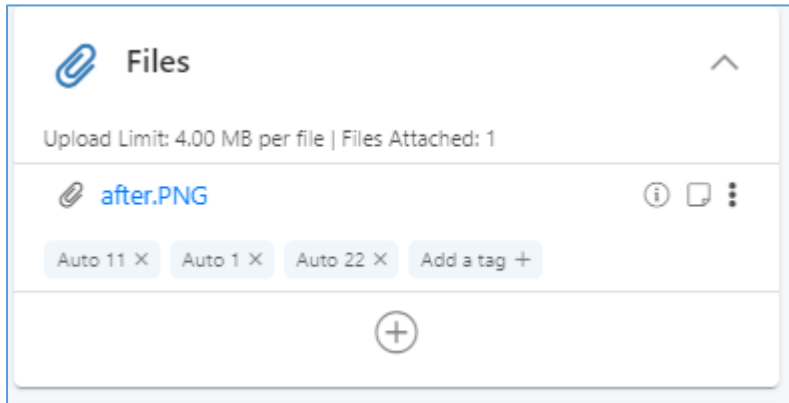
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1. Work Manager

1.1 Tagging Files

Tags can be added to files in the File card of work items. The tag titles available to you are set up in the Builder app by your system administrator. This will allow you to bring better structuring to your files when mailing out information.



Once added, tags will display in the files card, and will make them relevant for auto-adding to emails with matching tags.

1.2 Auto-attachment of files to inserted Email Content with matching Tags

When a new email is created in-process, or when a canned response text is inserted into a manual email, the system will identify any tags linked to the email's / canned text, and will then auto-attach all of the work item's files which share the same tag. Tags are linked to emails / canned response content as part of system configuration by administrator users in Builder.

1.3 Integration with ABBYY FlexiCapture OCR Technology

ABBY FlexiCapture Integrated Action

Enate is now able to provide integration with ABBYY FlexiCapture - this is achieved through use of a new action type: an ABBYY FlexiCapture integrated Action (see Builder section for guidance on how to create and configure this new action type).

When this action runs for any case, documents attached to the case can be submitted to ABBYY FlexiCapture for OCR Scanning and the processed output files will be returned and automatically attached to the case. Which documents are submitted will depend upon whether file tagging logic is in play:

- If a file tag has been specified in the action configuration then only files with this tag will be included in the scanning OCR activity,
- If no file tag has been specified, all files attached to the case will be scanned and processed.

Watch this video for more detail – <https://youtu.be/DMH1B-E50YM>

1.4 External Contacts creation prompt for new email addresses

When you send out an email which contains new email addresses (i.e. not linked to existing contacts), the system will display a popup to allow you allow user to create them as new contact records.

1.5 Rework Enhancements

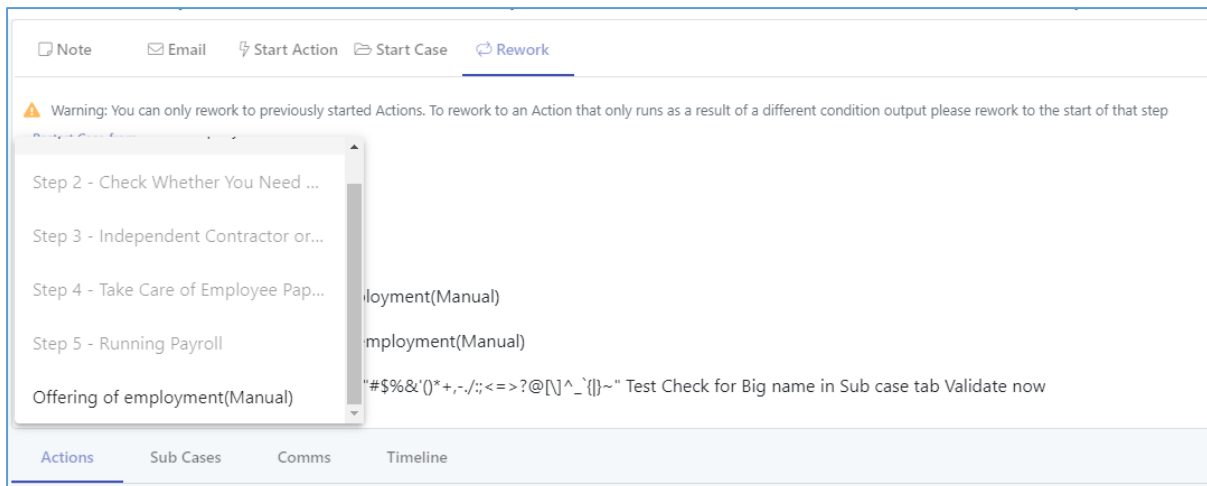
A. Auto-Assignment of Actions started while Case is in Rework

When an Action is started in a Case which is currently in rework, the Action will auto-assign to the same user who previously performed the same action (either the user who completed the action or, if it was not completed previously then the last user it was assigned to).

Note: If “Keep Actions with Me” is selected on the Case, the ‘keep with’ logic will take precedence.

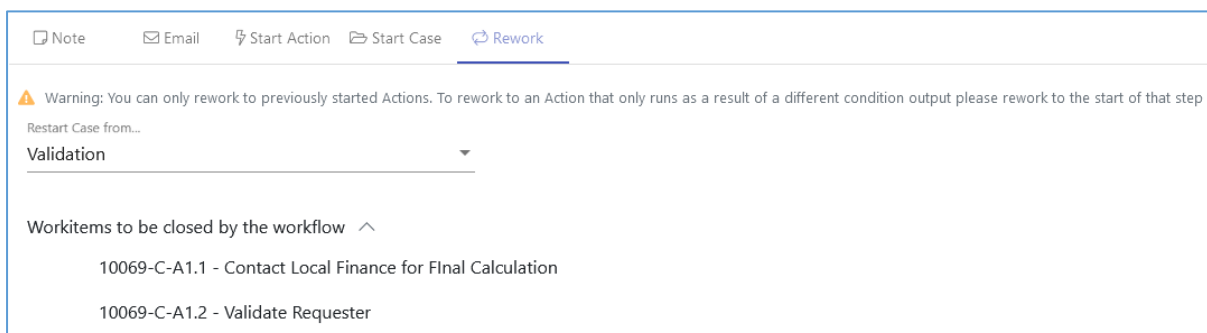
B. Select Step / Action to restart Case from

Users can now optionally choose a specific Action within a Step to rework from instead of restarting from the beginning of the Step.



C. Selecting Sub-Cases & Ad-Hoc Actions to be closed as part of Rework





When rework is started on a Case, the user is shown a list of running Actions and Sub Cases. The User can select which manually started Actions (Ad-hoc Actions) and Sub-Cases should be terminated when Rework begins.



1.6 New Action Type – Wait for Sub-Cases to Complete

A new Action type 'Wait for Sub Case to Complete Action' has been added to Enate. As the name suggests, once running this action will wait for all currently running Sub-cases for this case to reach completion before allowing the case to close.

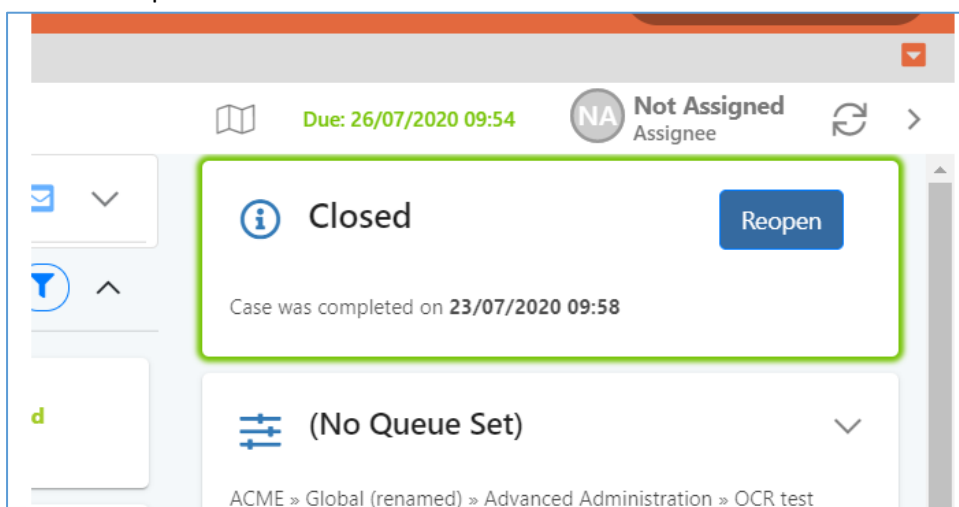
This will show to users on the Actions tab of the Case screen:

Actions	Sub Cases	Comms	Timeline
	100045-C-A1.4	startcase No Instruction	Completed:
	100045-C-A1.3	StartCase-Manual No Instruction	Completed:
	100045-C-A1.2	WaitForSubcase No Instruction	Due: 14/08/20 Assignee: User Queues: Sub
	100045-C-A1.1	Manual No Instruction	Completed: By: User1

1.7 Option to Reopen Cases during Feedback Window

Cases can be set with a feedback window (e.g. 2 weeks) allowing the requester some time within which to come back before the case is fully, irrevocably, closed. During this period it is possible to reopen the case.

- A Case will automatically re-open if (during the feedback window) an email is received or a Ticket is merged into it.
- A Case can manually be re-opened by a user using the “Reopen” button which presents on a completed Case which is within its feedback window.

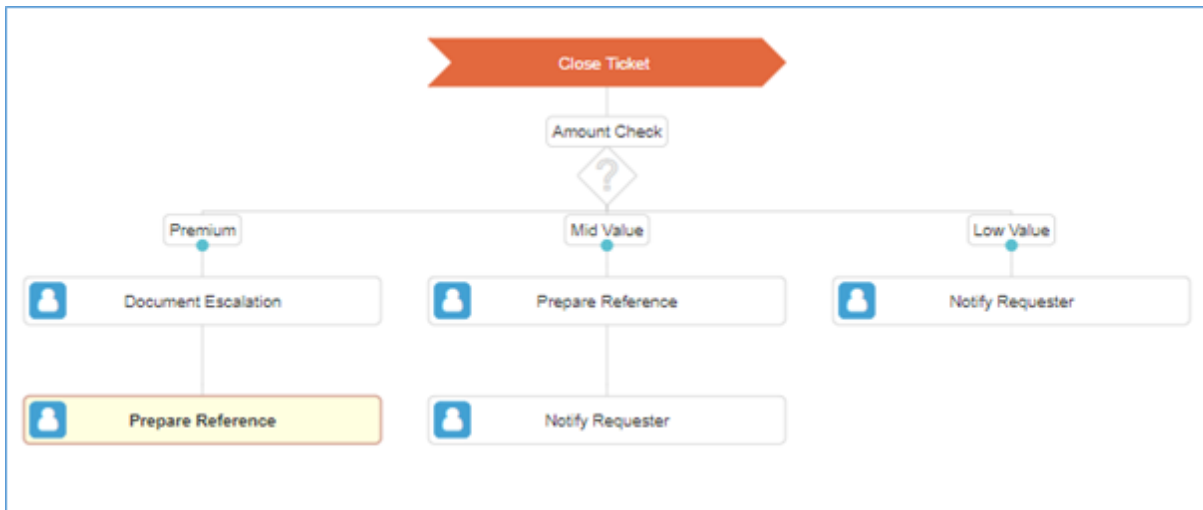


The Feedback window for a case is set in Builder as part of Case process configuration.

2. Builder

2.1 Case Conditionality

Users can configure a condition at the start of a Step to specify multiple optional flows of Actions which the Case could choose to execute, depending upon which condition is met. The link to set multiple conditional flows is available in the 'add' popup of a Step in the Case's flow configuration screen.



2.2 Email Templates

Email Templates are defined in Builder and are set at a global level – i.e. any email template defined is available for use within any process. They are accessible from the email icon link in the toolbar, under the 'Templates' section of the email screen.

Builder		
Connectors Routing <u>Templates</u> Canned Response ⓘ + Add Email Template		
Purpose ↑	Name	Last Modified By
Action Overdue	Action Overdue	Stu Price

2.3 Canned Response Configuration in Builder

Connectors	Routing	Templates	Canned Response ⓘ			
Email Template	Comp & Benefits	Customer Wide	HR Administration	Sample Case	Sample No-Step Ca...	Sample Weekly/Ye...
Case Default Adhoc	✔	✔	✔	✔	✔	
Default Template	✔	✔	✔	✔		
File Tag Test						
Stu Test 2	✔	✔	✔			
Stu Test 3	✔	✔				

In the 'Canned Response' tab of the email section in Builder you can create reusable standard texts available for service agents in Work Manager to add into emails they write. Their availability is defined at the SERVICE LINE level - create the content for a Canned Response within the Templates tab and then set within the table on the 'Canned Response' tab whether they are available for a Service Line or not.

2.4 Email Triage within Email Routing

Email Categorisation Rules can be defined within an Email Routing to provide more fine-tuned triaging and routing of an incoming email – when we are make decisions about where to send an incoming email (what kind of work item to create), we cannot use information about the incoming email itself to make that decision. Triage / categorization can incorporate:

1. Important flag on the email
2. Attachment type for example pdf or docx.. etc
3. Key Words in email subject line
4. Sender – check for multiple potential sender email addresses
5. Recipient – check for multiple potential recipients, both individuals and specified domains

Edit Email Routing

Email Route Name*

Description

Order*

Email Connector Name*

Process*

Customer Contract Service Process

Categorisation Rules ⓘ

Email Address*

+

- ! Is marked important
- 📎 Has attachments
- 👤 Recipient List Includes
- 👤 Sender List Includes
- A key words include

2.5 New Action – Trigger External API

An additional type of action has been added to Case flows: 'Trigger External API'. This type of action allows Enate to call out to an external system, passing a static structure containing the work item

information and including an optional callbackURL (which allows the external system to update custom data and pass it back into Enate).

Configuring an external api trigger requires you setup a new action in the case flow screen:

Create Action

Action Name

Action Type

Adding a 'Trigger External API' exposes an additional tab into the actions grid: 'External API' – here you can you can configure the details to call the external API, specifically the API Integration URL

Step	Action ↓	API Integration URL	Response Expected
1	Trigger Flow	http://myexternalapilink/enate	<input checked="" type="checkbox"/>

2.6 New Due Date Method – Custom Data Field (DateTime)

Due Date: Test Dynamic SLA Clone of HC DYNAMIC

Due Date Method:

Adjust by: **Advanced**

Use Calendar: Move to Next Morning if End of Day Move to End of Day

Allow Override: Add Wait Time to Due Date

A new due date method 'From a Custom Date Time Field' allows configuration of rules which allows end users to supply the base date/time value for the Due Date for the rule via a custom data field at runtime, when submitting a case or action. The custom field must be of type 'DateTime'.