

ATOmata Collaborate Upload Process Automation

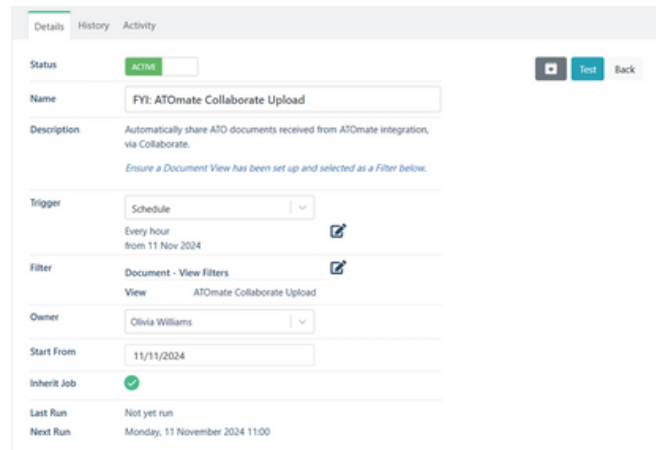


About this automation:

Use this process to automatically share documents from ATOmata to clients via their Collaborate site.

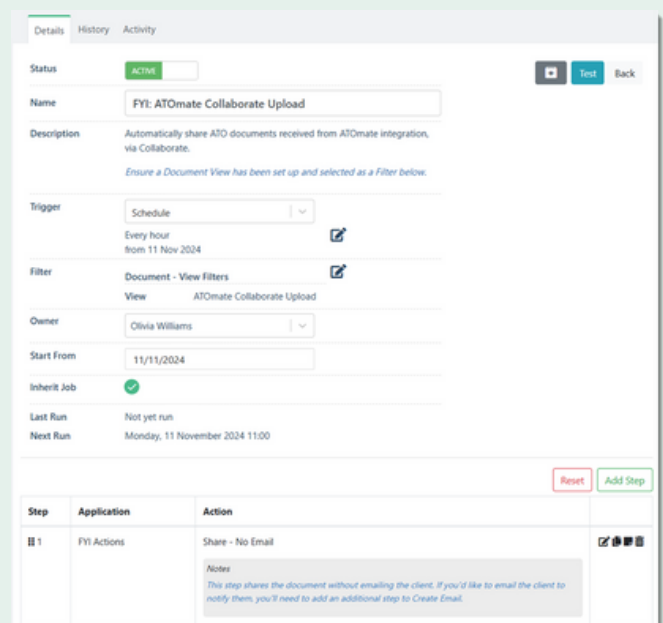
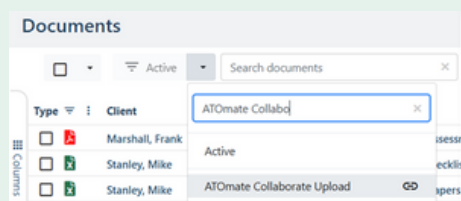
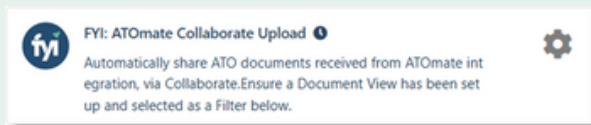


Simply import the sample automation, customise to suit your practice, test and activate!



What's included:

- ✓ Automation Process Steps

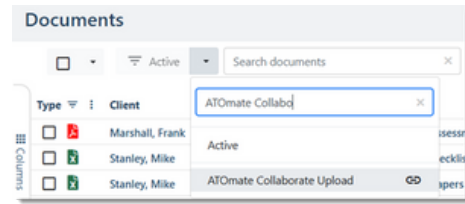


How to import:

Before you begin, ensure you have contacted ATOMate to automatically set up the cabinet for you. Then, save the view in the Documents list with the following filters:

"ATOMate Collaborate Upload " View:

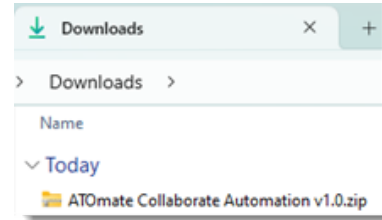
- Source = ATOMate
- Cabinet = ATOMate Collaborate



Step 1 - Save the import file locally

The first step is to download the zip file provided in FYI's help centre.

Simply save the file locally, for example, in your Windows Explorer Downloads folder. You do not need to extract the files.

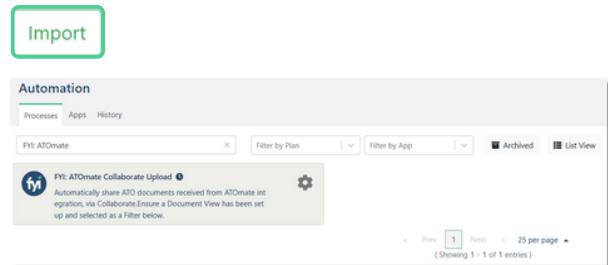


Step 2 - Import the files into FYI

Navigate to the Automations screen and click the Import button on the right-hand side of the screen.

Locate and select your saved "ATOMate Collaborate Automation" file and click Open to import the automation.

You can also drag and drop the zip file to the Automation list view. The Process will be imported into FYI as draft.



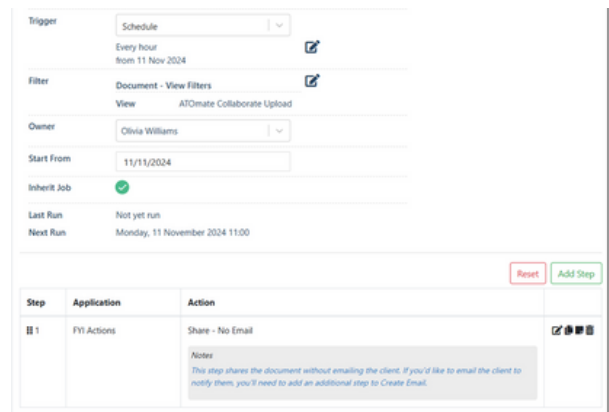
Step 3 - Review the process

Processes are imported with the Status set to Draft.

You can locate the process by searching for "FYI" in the "Search processes" field.

This process uses the ATOMate Collaborate Upload view, saved in Documents Lists.

- Review the schedule
- Review the process owner
- Review and update the process step.



Step 4 - Test and activate

Click the Test button to display a list of ATOMate uploaded documents. Tip: Where required, toggle Ignore Process Filter on to use other documents to test this automation. We recommend using a Test Client to test this process.

Search and select a specific document to run the test for and select Run Test.

Go to the Collaborate Site of the Test Client and review the Share folder, to locate the ATOMate document uploaded.

When ready, set the Status to Active.

- This automation is set to run automatically every hour from the commencement date.
- Add a Summary Notification step to the process if you wish to also notify a User of the upload.

