PaperVision® Enterprise WorkFlow

## Automate Document Routing to Streamline Business Processes

Make standard business operations easy to execute and easy to manage by electronically routing documents, alerting users of pending work assignments and tracking progress step by step using PaperVision® Enterprise or ImageSilo®.

Create Process Efficiency

- Make tasks easy by providing workstep instructions and putting all the necessary data at your fingertips.

- Identify process inefficiencies and bottlenecks with continually updated reports showing document status.

- Gain competitive advantage by electronically controlling business processes from the office or via the internet.

- Integrate email quickly into business practices using email and attachments to initiate a workflow process.

Improve Customer Service

- Increase customer satisfaction by decreasing document processing time.

- Respond to customer requests quickly with prioritized work queues and time-sensitive alerts.

- Give customers instant answers by electronically viewing the status of their request from your desktop.
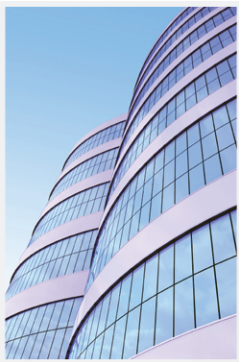
"WorkFlow helps us keep tight control over the incoming mail and the paper documents we receive. Instead of paper piling up on desks, we have electronic reports showing us who has the document and where it is in the business process."

- Keith Oufnac, Director of Information Systems, Eustis Insurance

Enhance Security and Compliance

- Provide documented evidence of compliant procedures with detailed audit reports.

- Monitor compliance by tracking live document progress with continually updated activity reports.

- Ensure proper procedures are completed within set timeframes by receiving alerts showing stalled or inactive documents.

For a complete product listing and technical information, please visit www.digitechsystems.com or call toll free 866.374.3569.

PaperVision® Enterprise WorkFlow

## Automate Document Routing to Streamline Business Processes

PaperVision Enterprise WorkFlow is the ultimate in business process management. WorkFlow enables businesses to fully automate standardized business processes, routing any document, anywhere, anytime, all while tracking the process and alerting users of new work assignments. Best of all, this product is available with our on-premise (PaperVision® Enterprise) and on-demand (ImageSilo®) Enterprise Content Management (ECM) systems.

Graphical Setup

To set up WorkFlow procedures, administrators use an icon-based, graphical diagram for simple point-and-click creation. For example, a mortgage administrator can effortlessly navigate thousands of mortgage applications through an otherwise complex loan approval process. Even if a loan application arrives via email with attachments, the system can initiate the process and forward the attached documents. When a procedure is complete, approved loan documents can be emailed to the appropriate manager.

Automated Processing

Users can be instantly notified when new assignments are available, and they are instructed on the tasks to be completed before the workstep can move forward. Workers can then make decisions with all the relevant data available at their fingertips. These decisions translate into proper routing and timely assessments, which drive profitability, increase customer satisfaction and enable compliance.
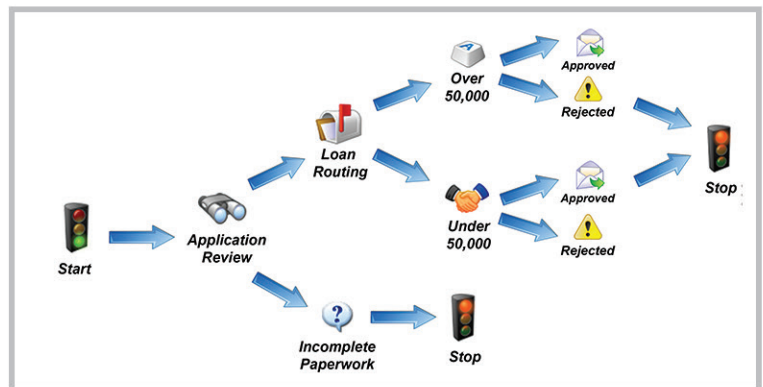

Effortless Administration

Single or multiple WorkFlow administrators can simultaneously manage an unlimited number of teams, projects and workflow instances from the comfort of their desktop or the convenience of the web. The administration console allows users to finish projects faster and manage the workflows with a more detailed eye. Inside the console, you can update multiple workflows at once, drag and drop items into a pattern quickly, and replicate workflows or copy and paste specific steps into new projects. Plus, make sure that all requirements along the way are substantiated, completed within set timeframes and meticulously tracked. Since business practices change over time, modifications can be applied instantly, even to active processes already underway.

Detailed Reports

WorkFlow processes are individually audited and immediately reported. View and print workflow tasks in their entirety or at any point during the transaction. Information about active processes is compiled in live, continually updated status reports. Custom notifications alert supervisors of overdue or stalled documents, allowing them to reassign duties. Detailed reports help managers to identify bottlenecks and improve process efficiency.
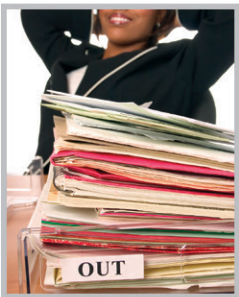
Powerful Process Management

WorkFlow is an optional, affordable addition to PaperVision Enterprise or ImageSilo. Increase competitive advantage by electronically organizing, controlling and intelligently routing the documents that drive your organization. Designed as a fully integrated module, WorkFlow is highly customizable, and connects and distributes powerful functionality to all licensed users, eliminating the need for additional integration and installation. WorkFlow also leverages all the security, scalability, reliability and integration options of the ECM system to guarantee the integrity and availability of the data.

PaperVision® Enterprise WorkFlow

Technical Specifications

PaperVision Enterprise WorkFlow is an optional module of PaperVision® Enterprise or ImageSilo® that extends enterprise content management functionality to include automated document routing. Flexible licensing allows you to implement an unlimited number of workflows, to implement on a per workstep basis or to implement on a per user basis. WorkFlow is part of a suite of Enterprise Content Management products that also includes solutions for email management and COLD/ERM print stream processing.

System Overview

- Centralized administration console for all administrative, database and workflow functions is included
- Graphical design of workflow processes eliminates the need for any programming or scripting
- Workflows can be launched automatically based on administrator-defined conditions such as criteria and schedules or a specific "action date"
- Evaluation rules specify which tasks must be completed for a workstep to transition
- Workflows can be edited, and changes are effective immediately—even on current workflow processes
- Administrators can quickly activate and deactivate workflow processes
- Multiple workflows for a particular entity can be updated at the same time
- Workstep time restrictions ensure steps are completed in a specified time frame
- Worksteps waiting in queue allow users to see details such as document ID numbers and index values, giving them specific information about pending documents
- Workflow participants can take ownership of any workstep to complete the tasks in their work queues
- Workstep ownership can be changed manually by administrators or automatically (based on pre-defined conditions) to eliminate bottlenecks
- Automatic email notifications simplify process efficiency and maintenance
- Workflow tasks can include sending email messages with attachments or even links to other documents
- Worksteps or entire workflows can be replicated by copying and pasting, streamlining workflow setup
- Documents in a workstep can remain active until all related documents are found, ensuring an entire package exists before processing
- Send workflow instances to multiple worksteps simultaneously to allow multiple users to complete tasks at the same time
- Custom notifications can be sent to workflow participants or administrators based on specified conditions
- Status reports provide detailed information about current, active workflow processes to improve process efficiency and eliminate bottlenecks
- Users can view workflow status without administrative rights, enhancing productivity while maintaining security
- Detailed history reports contain completed workflow processes, worksteps and tasks for simplified auditing
- Reports can be archived, filtered and printed for review at a later time
- System adheres to provisions from the Workflow Management Coalition, ensuring continuity with emerging standards
- System works with Scan2PVE and Scan2ImageSilo to capture documents and upload them into a new or existing workflow process
- System works with PaperVision® Message Manager to leverage email and attachments to automatically launch workflow processes
- All upgrades are included with annual maintenance, ensuring access to the latest product features and benefits
- Complete, detailed online help includes step-by-step instructions to get you started quickly
- Toll free, legendary technical support is eager to assist with any questions you may have

Security

- This add-on product is fully protected and supported by the same security features and capabilities of PaperVision Enterprise or ImageSilo (see ImageSilo and PaperVision Enterprise product sheets for details)
- Simplified administration can be performed by specific users or general system administrators

Scalability and Reliability

- Flexible licensing allows you to deploy workflow functionality within a single department or across an entire enterprise
- Unlimited workflow participants can be defined based on existing PaperVision Enterprise or ImageSilo users and groups
- Simple user interface allows administrators to graphically define and edit multiple workflows with unlimited worksteps in seconds
- Unlimited tasks can be included in a single workstep to increase flexibility in workflow design
- Multiple servers and workstations can be load-balanced to ensure task efficiency even during busy times

PaperVision Enterprise WorkFlow Technical Specifications

Integration

- Extensive use of web services to support integration and cross-platform compatibility
- COM-based APIs support both local and remote communications without requiring modification to code
- ActiveX® (OCX) controls can be embedded into third-party applications
- Customizable source code is included for both browser-based and desktop client applications
- System supports the ability to launch line-of-business applications automatically at any point in the workflow process
- Integration with Microsoft® Office SharePoint® Server 2007 enables companies to leverage the PaperVision® Enterprise WorkFlow functionality directly within their SharePoint portal
- Custom code enables virtually any action or integration to occur as part of a business process

WorkFlow Toolkit

The WorkFlow Toolkit is an optional, separately licensed component of PaperVision Enterprise WorkFlow that enhances integration and enables users to easily access WorkFlow controls from their line-of-business application. Benefits include:

- WorkFlow ActiveX controls offer developers an industry-standard programming interface and can be easily deployed with any application
- WorkFlow controls integrate directly with your line-of-business interface for easy and instant interaction
- Integrated access to the worksteps waiting in queue allows users to act on documents the moment they are ready
- Integrated access to the task list enables users to conveniently view and check-off tasks for each document
- Integrated access to current workstep ownership simplifies task prioritization and enhances productivity
- Included samples provide a simple, easy-to-follow examples for implementing WorkFlow controls within your line-of-business application