

Document Management and Workflow Systems

It's a fact of corporate existence. There always seems to be that one critical person that knows exactly how the paperwork flows through an office and what is done to complete each piece. That person is the Office Manager.

Want to know where an invoice goes after it leaves the mailroom? Ask Ms. Wozniak.

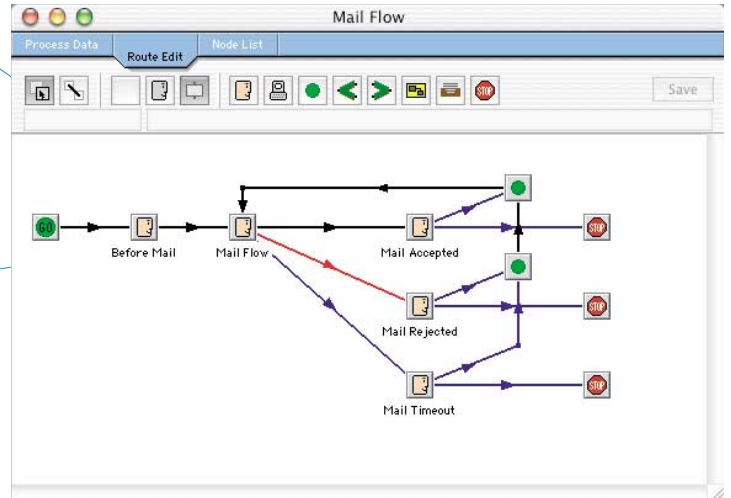
How to I complete form 1066, part BZ? Ms. Wozniak knows.

Who handles the Cloud 9 account when Bob is on vacation? Ms. Wozniak can tell you.

In fact, it sometimes seems as though the success of your organization hangs on the continued good health of Ms. Wozniak. Her encyclopedic knowledge of how paperwork is processed provides the grease that ensures the wheels of your business continue to turn smoothly and efficiently.

Optix Workflow is like having a roomful of Ms. Wozniaks. Our Graphical Route Editor allows you to visually and interactively define how information and documents flow through your organization. Create as many different routes as you wish, each customized for a particular document type. Start any document down its automated path by simply dropping it on a route. Optix saves it to the workflow server and provides it to whoever needs it next.

Documents can be routed from person to person, between groups, offices, and even to automated processes that you might already have in place on your system. And at each step are a set of rules defining what is to be done and what decisions need to be made - approval, rejection, application acceptance, bill payment - you can define whatever actions you need and the rules surrounding what happens when those decisions are made.



"Optix is a massive improvement over our previous paper process."

Steve Edwards, Director of Administrative and Enterprise Applications, University of Maryland

Optix can assign work to groups or office pools, where any member of the group can pick up the next thing to be done. Documents requiring approval from several offices can be simultaneously routed, with notifications provided to a supervisor when those approvals are complete. Users can quickly make overlay notes on routed documents using our suite of annotation tools. And with Optix Web, your remote browser-based users can be an integral part of your processing anywhere in the world.

Want to know where a document is in the office? Optix tracks your documents and can tell you exactly where its been and what is left to do.

And the next time Bob goes on vacation? Optix can automatically delegate his work to the next responsible person.

Join the many organizations that have realized tangible benefits by automating their business practices with Optix Workflow.

And you can finally give Ms. Wozniak that promotion and vacation she so richly deserves.

Node	Node Name	In Time	Participant	Due Date	Response
View Activity	Before Mail	Aug 15, 2001 2:46 ...	Administrator, Optix	Aug 15, 2001 2:47 ...	0
Select Activity	Mail Flow	Aug 15, 2001 2:47 ...	Mailflow, Optix	Feb 6, 2002 10:50 AM	1
Select Activity	Mail Accepted	Sep 7, 2001 3:58 PM	Administrator, Optix	Sep 14, 2001 10:52 ...	1
Select Activity	Mail Rejected	Sep 7, 2001 3:59 PM	Administrator, Optix	Sep 13, 2001 6:22 ...	1
Select Activity	Mail Timeout	Aug 28, 2001 5:42 ...	Administrator, Optix	---	0
					0
					0
					0

Optix Workflow - Technotes

Overview

- Production workflow engine designed and built for the Optix Document Management system.
- Design and develop workflow process maps using drag and drop in the Optix Graphical Route Editor.
- Use the Optix Screen Generator to develop workflow routing slips for each workflow process.

Details

User Features

- Unified in-basket for all work items. Users have a single location to review and perform all tasks.
- Comments can be added at each step, to be recorded and reviewed later. Image files can be annotated using the Optix Workstation.
- Enhanced delegation model allows multiple delegations at a workflow step. Allows users to quickly break work into subtasks and delegate as appropriate.
- Integration with Optix document management check-in/check-out prevents two users from working on the same document simultaneously, preventing lost work.
- Supervisors can review subordinate work lists, and perform actions in their absence.
- Route single or multiple files and hierarchies through Optix Foldering, supporting compound documents for creative applications such as graphics and publishing.

Process Features

- Process maps can call sub-processes to allow for multi-departmental workflows, multiple workflow designers and administrators, and process reuse.
- Single or multiple participants at each workflow step. Users can be grouped into pools to share work.
- Conditional rules-based routing allows work to be routed based on routing slip information. Allows you to vary process and approvals based on user-defined attributes (e.g. invoice amount, account name), as well as define exception processing.
- Supports serial and parallel routing through rendezvous.
- Dynamic routing allows routing slip values to determine participants, allows for integration with external business systems.
- Activity deadlines can flag past due work, send email or alerts, automatically advance the work to the next step, or even escalate the work item to a supervisor for completion.
- Optix Workflow captures who and when for each step, which can be reviewed. Results are also logged to a database table to allow you to create your own management reports.
- Electronic mail integration to support alerts of exception conditions, missed deadlines, or for arrival of new work for infrequent users of the system.
- Supports synchronous and asynchronous external program execution to integrate with other business systems.
- Workstation scripting allows for integration with other desktop applications.
- Vacation proxy allows work to be automatically routed to another participant when users are out-of-office.
- Integration with Optix Web allows participation while on-the-road or for casual users.

