

## Workflow Manager

### Product Info



## Optimize Your Document-Based Company Processes

Establish clear rules for processing documents to optimize your business processes with DocuWare Workflow Manager. It works with a high-performance graphical user interface named Workflow Designer enabling you to easily create and edit workflows. No need to pay for programming, you can develop simple to highly complex processes by using easy to recognize symbols.

You assign: employees, tasks, and define substitution rules in case the employee responsible for that step is out of the office. You also determine which event should set a workflow in motion, for example, storing an incoming invoice. And naturally, you can track all processes.

### Benefits

- Task lists provide an immediate overview of all workflow tasks.
- The Workflow allows you to work intuitively with documents.
- Substitution rules and escalation management keep business moving forward: tasks are not left unfinished for long periods. If the person responsible is out of the office, they are automatically assigned to a substitute. If a task is overdue, the employee is sent a reminder.
- Create your own workflows without the expense of programming.

# Greater Efficiency, Nothing is Overlooked

The Workflow Manager lets you combine parallel running tasks in one workflow. Let's take for example an insurance firm whose employees need to process numerous benefit applications every day. Since they work at different locations, they cannot easily forward the applications to other available staff members. With Workflow Manager, every employee has their own task list in which all the applications are listed. As soon as someone selects an application for processing, it is marked 'allocated' in everyone's task list. This ensures that tasks (applications) are only selected by one person and that all applications are processed.

## Clear Company Processes

Tasks can also be assigned to "substitution rules" in addition to users or roles. This means you can use a substitution rule to assign responsibilities to abstract positions, such as cost centers, which encompass a group of people. The task is automatically assigned to the first employee on the list who is indicated as "present in the office." Using substitution rules allows your company to complete all workflows regardless if certain staff is absent. Managers also have the opportunity to track the processes at any given time.

## Complete Tasks Quickly and Easily

Tasks can be completed promptly and efficiently in DocuWare. For example, you can process invoices with digital stamps, and thus release the whole or part of the amount in a few clicks. You can also use a form to do so. Or you can use both options at the same time: You fill out the form and a corresponding stamp is set automatically. So that every employee has all the relevant information for their decision, the invoice amount can be automatically read out by Web Service and entered in your workflow form for incoming invoices.

## Define Escalation Stages

You establish deadlines for tasks in escalation stages, and determine what should happen if deadlines are missed. Depending on your settings, Workflow Manager can, for instance, send reminders or automatically reallocate the task. This means you can ensure that no task remains unfinished, and that the people responsible can react before deadlines expire. Simply adjust Workflow Manager precisely to the individual working times of your organization.

# Efficient Workflow Designer

The Workflow Designer is the graphic user interface where you can set up tasks in a workflow. Here is where you define the conditions for forwarding documents from one work stage to the next. Thanks to the clear layout of the Workflow Designer and its intuitive interface, you can work with more efficiency. You can always see the individual workflow steps in the clear top-down structure.

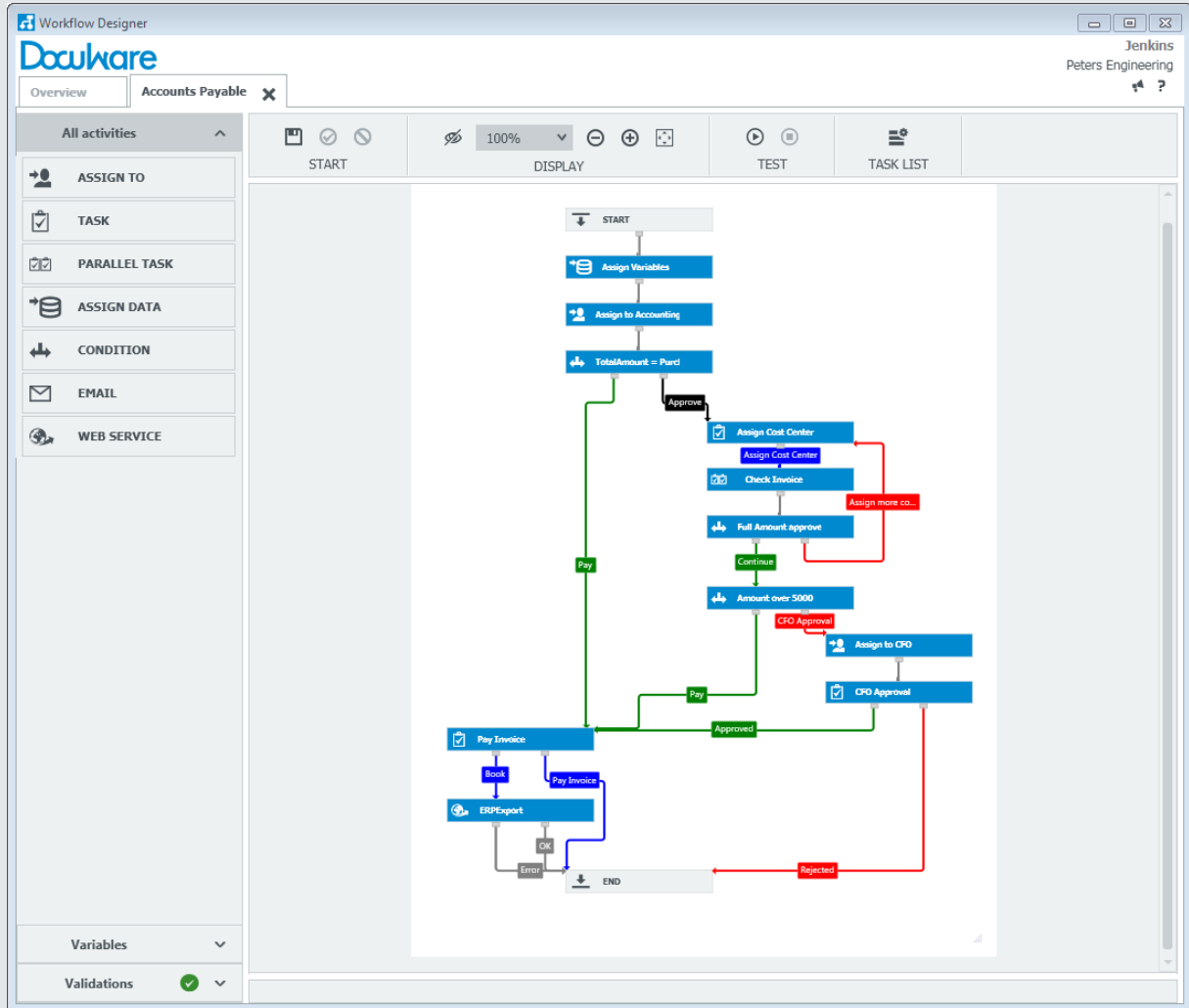
No programming knowledge is necessary to use the Workflow Designer. You only need to know the workflow goal in order to set it up quickly with the practical Designer symbols. Integrate individual tasks and automatic processes in the workflow using drag and drop, and establish how the individual steps should be executed.

Even if there are not yet any documents for a business transaction, you can already create a workflow for it: For example, if your company is expecting a delivery, you can create the order for it as a data record in DocuWare. As soon as the data record is created, a workflow starts that issues a task to Incoming Goods giving an overview of the incoming orders. The delivery note is immediately appended upon delivery and the task continues to the inbox, where the invoice is appended.

## Functions

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- Track all processes in the workflow sequence.
- Depending on which kind of document is stored, this may trigger another workflow, for example the invoice workflow in the case of an incoming invoice.
- Clear guidelines tell the employee what to do in a specific task.
- Determine the conditions for forwarding documents or for actions that must be executed before or after a deadline passes



Create workflows easily in Designer using drag and drop. Drag the activities indicated on the left into the flow diagram. A new window is displayed where you can define the properties for each activity.



This document can also be found here:

<http://pub.docuware.com/en/workflow-manager>

For more information please visit our website at

[www.docuware.com](http://www.docuware.com)