

PaperVision® Enterprise WorkFlow

Presented by Digitech Systems



Any Document.

Anywhere.

Anytime.

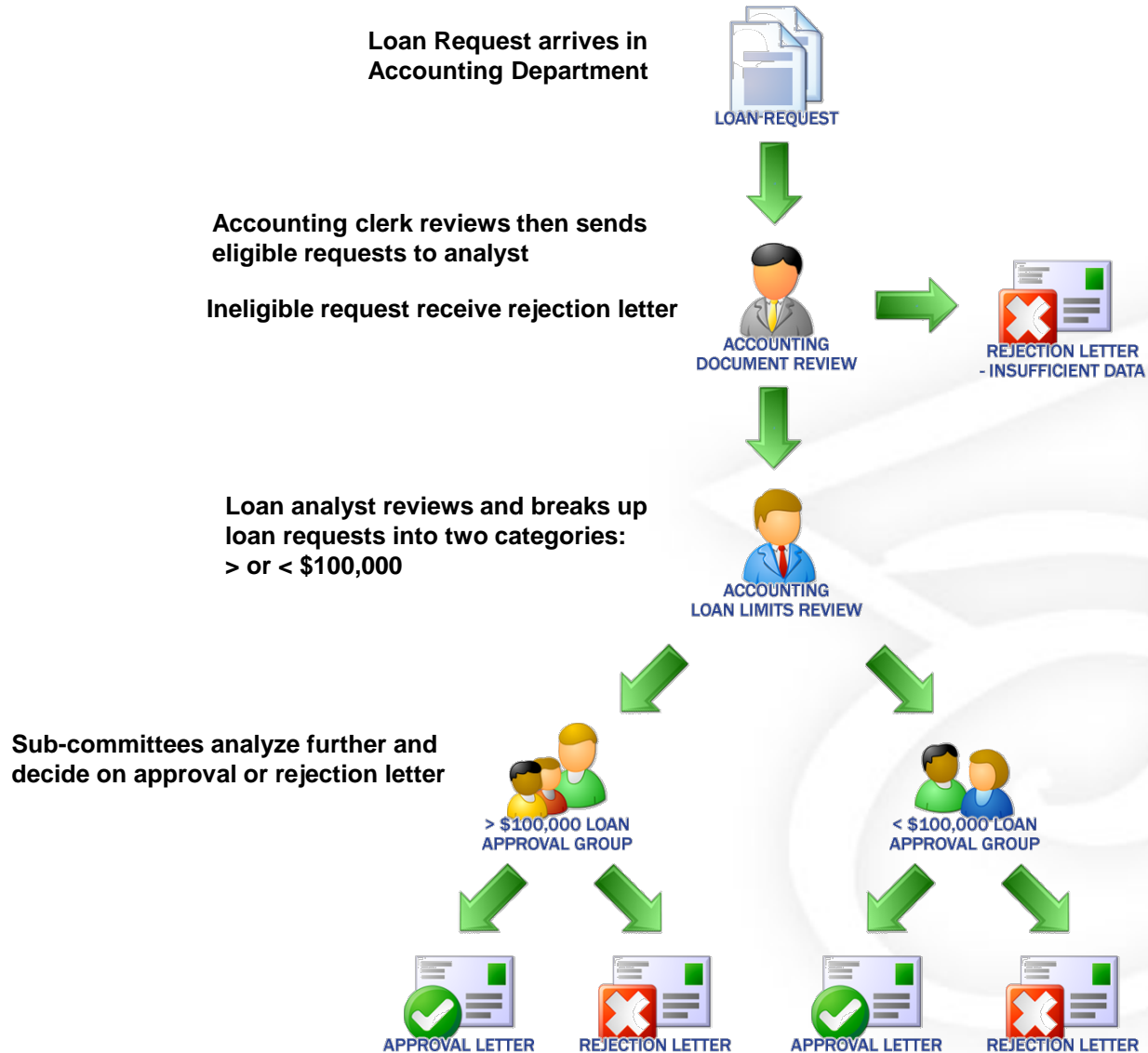


What is WorkFlow?

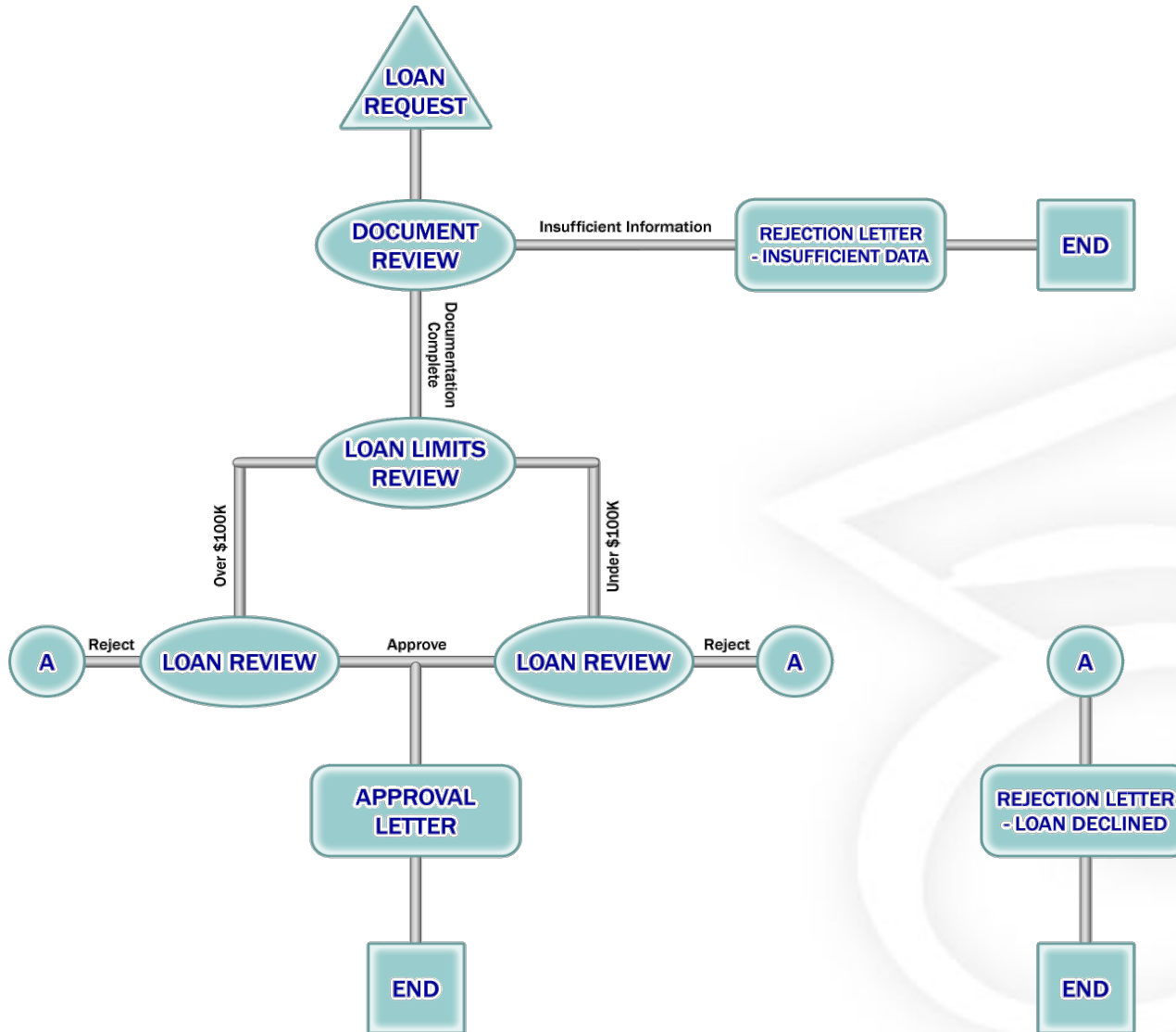


- Makes standard business operations easy to execute and easy to manage
 - Electronically routes documents
 - Alerts users of pending work assignments
 - Tracks progress step by step
 - Custom Code integration available (R78 and above)
 - Works with PaperVision[®] Enterprise or ImageSilo[®]

WorkFlow Process



WorkFlow Process



WorkFlow Process



Loan Request arrives in Accounting Department



Accounting reviews and performs research then sends candidate to committee. Non-candidates receive rejection letter



Loan committee reviews and breaks up loan requests into two categories: > or < \$100,000



Sub-committees analyze further and decide on approval or rejection letter



APPROVAL LETTER



REJECTION LETTER



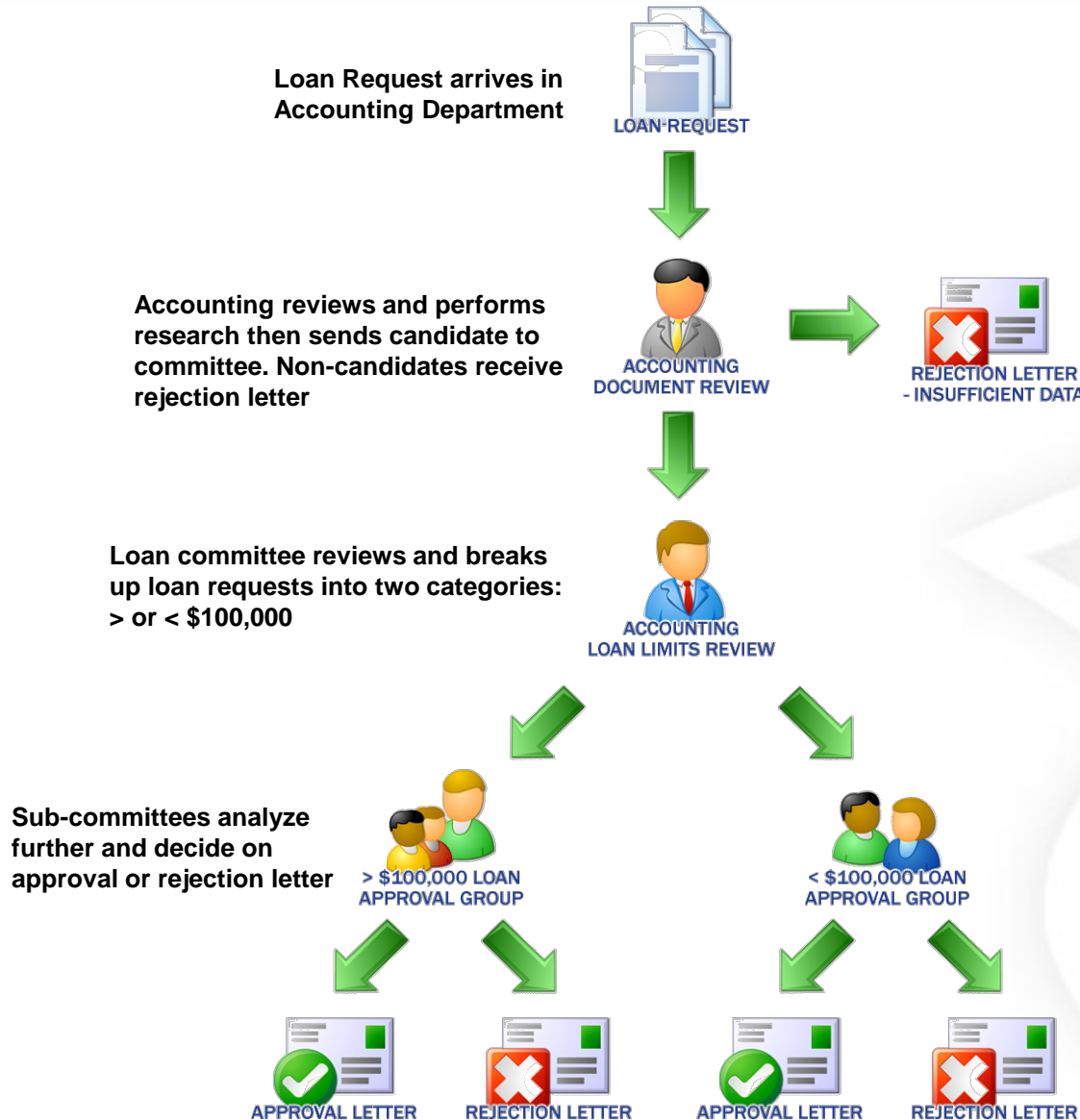
APPROVAL LETTER



REJECTION LETTER

Business Process translates into **WorkFlow Definition**

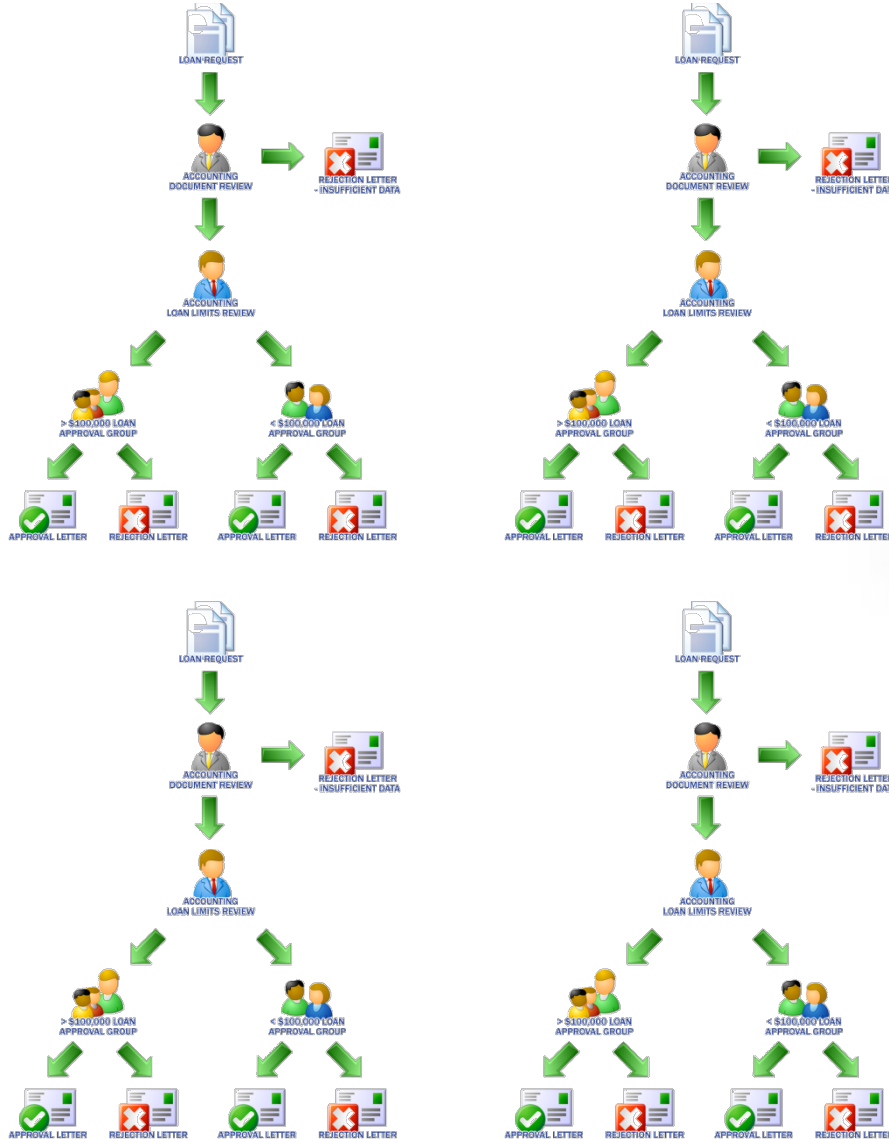
WorkFlow Process



The **WorkFlow Definition** is used as a template for actual workflow processes to begin following the defined path.

When the definition takes affect and the process actually begins, it becomes a **WorkFlow Instance**.

WorkFlow Process

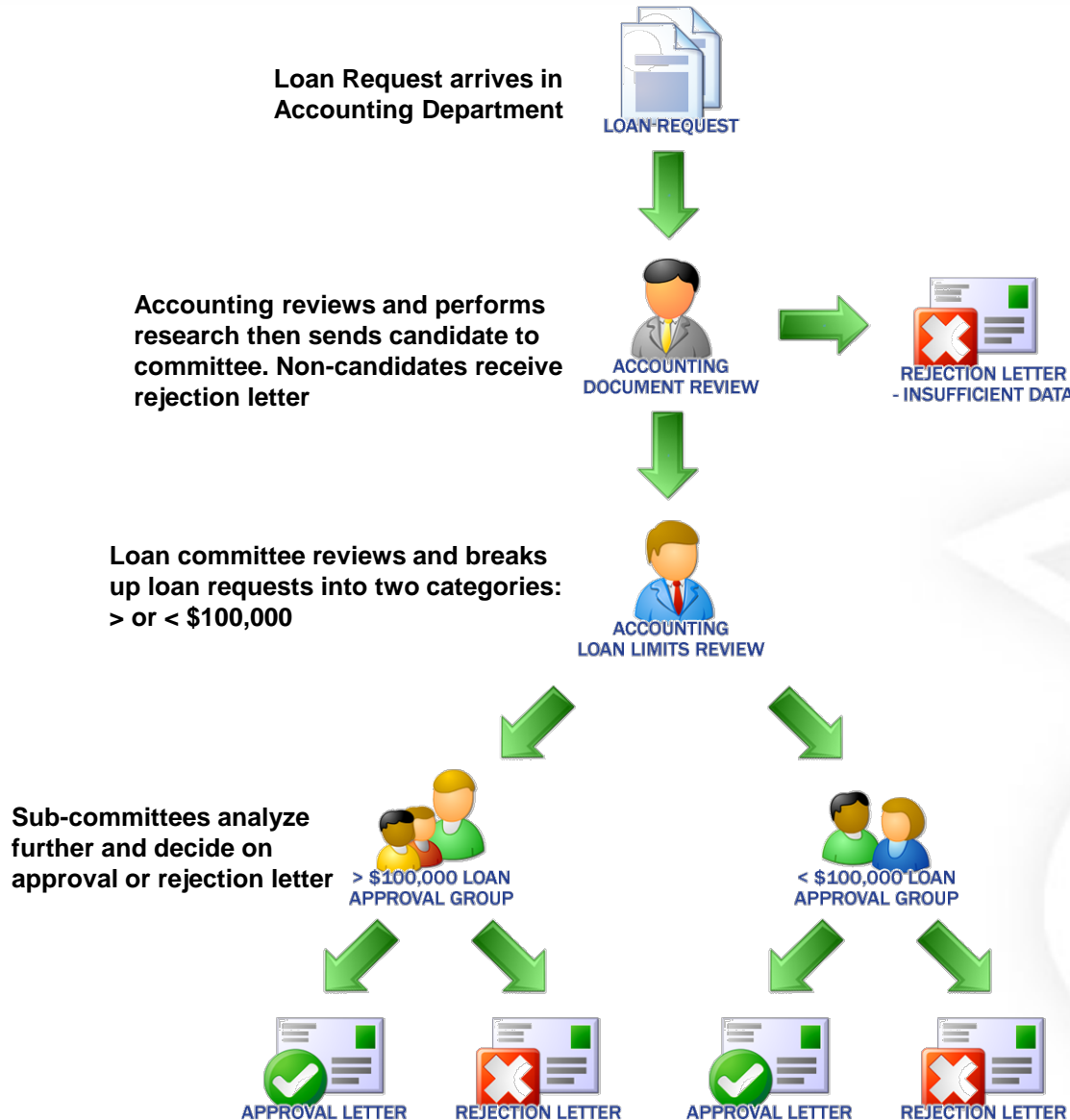


Since many instances of the same business process can occur...

...multiple, identical **WorkFlow Instances** (same definition, different *instance*) can be running at the same time.

Each **WorkFlow Instance** is tracked individually for audit reports.

WorkFlow Process



WorkFlow Definitions are comprised of:

- Pre-Conditions
- Worksteps
 - Tasks
 - Workstep Participants
- Post-Conditions

WorkFlow Process



**Loan Request arrives in
Accounting Department**



Pre-Condition is met when a document is imported into the system with an index value of "Loan Request."

Existence of **Pre-Condition** causes **WorkFlow Instance** to initiate.

WorkFlow Process

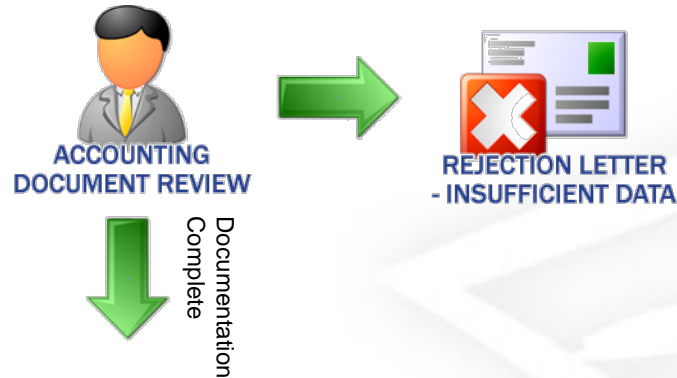


This **Workstep** has associated **tasks** and **post-conditions**.

When met, the workstep can transition to the next workstep.

Accounting clerk reviews then sends eligible requests to analyst

Ineligible request receive rejection letter



Initiation of **WorkFlow Instance** leads to first **Workstep**.

The **tasks** in the **Workstep** can include any user-defined parameters:

- Ensure all documentation is present
- Ensure all fields are completed properly and legibly
- Reject

WorkFlow Process

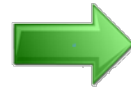


As **tasks** are completed, **post-conditions** are evaluated.

Only one **post-condition** must be met for transition to occur.

Accounting clerk reviews
then sends eligible
requests to analyst

Ineligible request receive
rejection letter



Workstep
Instance

- Ensure all documentation is present
- Ensure all fields are completed properly and legibly

Post-condition 1

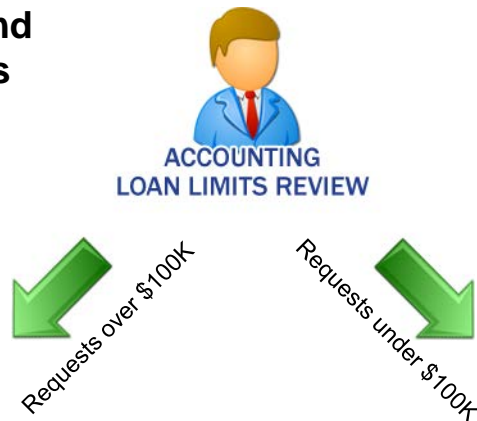
-
- Reject

Post-condition 2

WorkFlow Process



Loan analyst reviews and breaks up loan requests into two categories:
> or < \$100,000



Post-condition has been met, so...

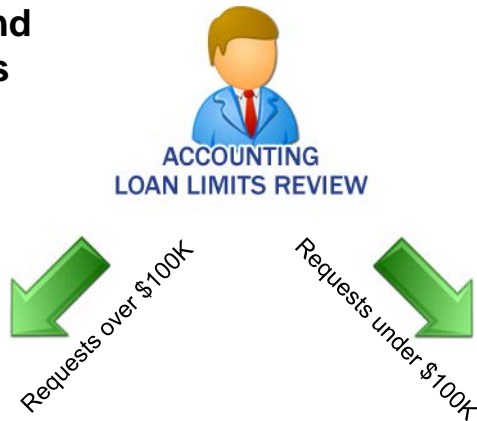
...transition to next **Workstep** occurs.

And the next series of **tasks** and **post-conditions** are in effect.

WorkFlow Process



Loan analyst reviews and breaks up loan requests into two categories:
> or < \$100,000



Tasks

1. Verify amount
2. Verify contact info
3. Request over \$100K
4. Request under \$100K

Post-conditions

- 1,2,3
- 1,2,4

WorkFlow Process



Sub-committees analyze further and decide on approval or rejection letter



Tasks

1. Approval
2. Approval Letter sent out
3. Rejected
4. Rejected Letter sent out

Post-conditions

- 1,2
- 3,4

Worksteps vs. Tasks



One point of confusion in defining workflow processes is determining whether an operation should be a task in a workstep or the operation should be represented as a whole new workstep. Here are some guidelines to help assist in making that determination:

- If operations must be completed in a specific order, the operations should be separated into different worksteps, since multiple tasks in a workstep can be performed in any order.
- If the operations must be completed by separate groups of users, those operations need to be split into multiple worksteps.
- If there is a benefit (processing time, cost, etc) for splitting multiple operations across multiple users, you may want to consider separating them into different worksteps, since only a single user can perform all of the tasks in a specific workstep instance.

Spawning WorkFlow Instances



- Loading a data group
- Manually adding a new document
 - Must have user rights
 - If document meets the pre-conditions it will spawn a workflow instance
- Checking in a new document version
- Manually spawning a workflow instance
- Generated from an existing workflow

Steps for a Successful Workflow



1. Learn the customer's needs
2. Create an outline of the business process
3. Define the workflow via the PaperVision Enterprise Administration Console
4. Test the process thoroughly
5. Roll out live
6. Verify process integrity