

Xerox DocuShare User-Defined Workflows

Implement Document-Centric Business Processes without Custom Coding

Workflow means different things to different people depending on their organizational role. For the average knowledge worker, workflow is associated with specific business processes, such as a loan coordinator managing the numerous documents and multiple steps associated with a loan application, or a human resources employee handling the I-9 forms, nondisclosure statements, salary approvals, IT requests, and numerous other forms associated with hiring an employee.

Automating these types of business processes is a common organizational goal. However, the technical configuration, process design applications, and custom coding often required to achieve automation can be a daunting and costly undertaking for many companies. This is especially true when the same process differs between functional groups or across geographies or divisions. Xerox DocuShare User-Defined Workflows solve this dilemma by enabling business-oriented process owners to implement business workflows quickly using any

of three simple, user-accessible mechanisms: notifications, document routing, and content rules—without any custom programming or technical knowledge.

Receive Notifications When Changes Occur

Notifications are the simplest workflow tool and inform specified recipients via email whenever a change occurs to a DocuShare object. Registered users can quickly set up notifications for themselves and other people (including non-registered users external to DocuShare) for event triggers such as:

- Adding content to a collection or removing it
- Editing a document
- Changing document properties or permissions
- Locking, unlocking, or checking out a document
- Changing an object's ownership

This approach is best suited for simple workflows, facilitating what's typically a manual process, such as alerting a hiring

manager whenever new resumes are added to a collection for a specific job opening or notifying board members when minutes from the last meeting are available.

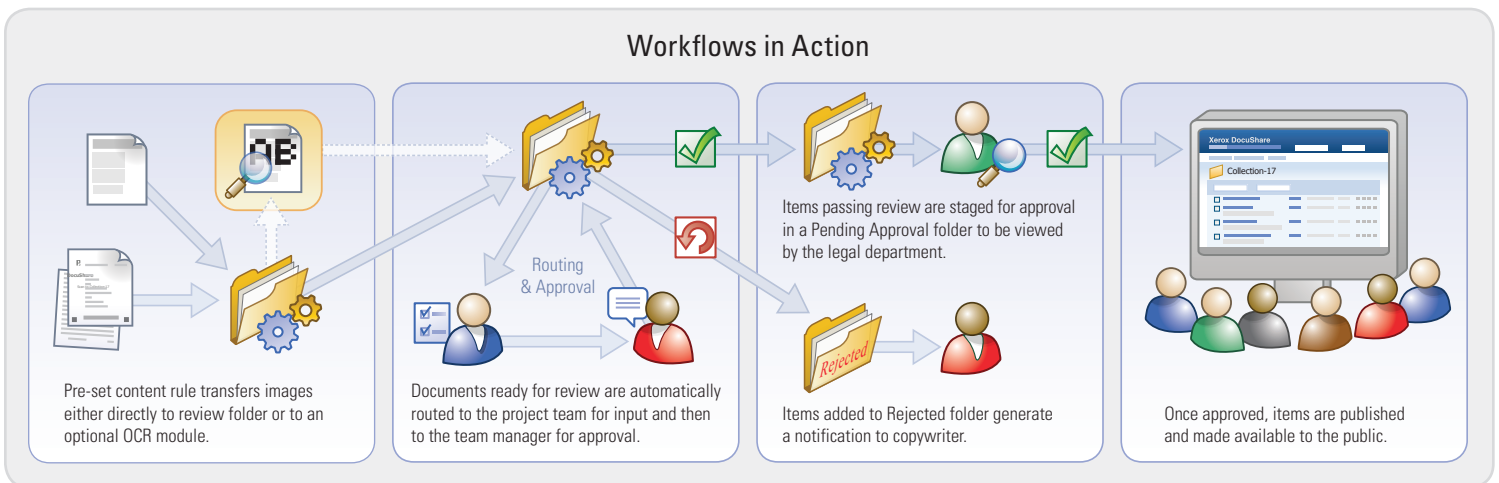
Route Documents for Review or Approval

Document routing goes beyond basic email notification to automate document processes and request that specific action be taken after a document is received. It even confirms that everyone asked to review or approve content has the appropriate access permissions to do so, which is an important part of ensuring that document security is maintained during collaborative workflow processes.

User-friendly routing slips also offer significant flexibility, and give registered users full control over the review and approval process, enabling them to:

- Specify the recipient action required (review, approve, or acknowledge)
- Indicate whether the document should go to the entire group simultaneously or one person at a time in a specific sequence

Workflows in Action



- Provide action instructions in the routing email for each recipient
- Stipulate who must respond to the request: one person, a majority of recipients, or all recipients
- Specify whether, when, and how to escalate the routing if the required number of participants do not respond by a specific date
- Define a single routing step that consists of one action, such as sending a document to users for approval, or several sequential steps that automate a more elaborate document process

The document routing workflow option is well suited for a multitude of business processes, from basic document review and approval by a single person, to multi-step processes involving a large team and numerous approval levels, editing cycles, and information gathering phases. A typical employee evaluation process is a good example of what can be implemented using only the routing capabilities of DocuShare:

- Each participant in the process receives a routing slip for the evaluation document along with a cover email outlining the handling requirements and due date (all based on parameters in the routing slip)

Any registered user can quickly create a routing slip, indicating the action that recipients should take: approve or disapprove the document, review and make changes to the document, or acknowledge receipt of the document. Specifying the routing order is equally simple, choosing from one of four options: in order, at the same time—single reply, at the same time—all reply, and at the same time—majority reply.

for the rule action to activate), and the action itself. Unlike review and approval, which requires a person to take action on a document in order to change its state in the workflow, content rules can automatically change document properties or a document state without any human intervention. For instance, content rules can mark certain folders as complete or ready for review, and then move the folder into a workspace or collection for the next stage in the workflow.

These capabilities make content rules ideal for loan applications and similar business processes where the content’s description, format, or location must be automatically modified. Users can create a rule that marks a folder as “loan application complete, loan pending underwriting review” as soon as the signed disclosure statements arrive in the collection. That same rule can also copy the folder into the underwriter’s workspace, upon which the underwriter receives an email indicating the application is ready for review. Document routing or notifications alone can’t do this. However, both notifications and document routing can be initiated under the control of a content rule (or triggered by a change made through content rules).

- During the first stage, peer commentary from a majority of coworkers is solicited
- After step one is complete, the manager is required to edit the document, after which it is routed to the human resources team for review
- After final approval, the evaluation document is routed back to the employee’s manager to present to the employee

Use Content Rules for Process Automation

Content rules go beyond basic document routing capabilities, enabling business users to easily define advanced, document-centric workflows. Each content rule includes three components: event triggers (similar to those used in notifications), content filters (conditions that must be true

System integrators can use the CPX Workflow Studio to further extend the capabilities of content rules available in DocuShare CPX, if necessary. Workflow Studio allows integrators to generate custom content rule triggers and actions that will be used in DocuShare CPX-managed workflows.

User-Defined Workflows are just one of the key features available in Xerox DocuShare products that enable enterprises to more efficiently capture, automate, and leverage content that drives critical business functions.

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