

Workflow Suite™

Intelligent Workflow for Knowledge Workers

- ▶ Flexible automation of the paper shuffle
- ▶ Intuitive configuration
- ▶ Maintain constant productivity
- ▶ Improve accountability

The Problems with Paper Traffic

Your staff searches for information, acts on it, moves it and archives it every day. The manual processes of searching, faxing, photocopying and distributing documents are costly and time-consuming. The inefficiencies divert your staff from the crucial business of making productive use of information.

Make Decisions, Not Copies

A successful workflow software solution eliminates the need to move documents physically from place to place. No more time spent figuring out who has the document. No more lost documents. No more making copy after copy of a document. Documents automatically route to appropriate persons who remain productive at their desks. Workflow reminds staff of required tasks and notifies supervisors of action and inaction. The Workflow Suite creates an environment where your staff perform as responsible professionals whose time is better spent making decisions than making copies.

The Laserfiche Workflow Suite

A knowledge worker's desk is a work hub from which the professional retrieves, uses and disseminates information. The Laserfiche Workflow Suite is designed with this concept firmly in mind.

The Laserfiche Workflow Suite increases productivity by automating document-centered work processes. An intuitive graphical interface provides easy work process modeling and streamlining. Routing and notification services guarantee smooth workflow despite user absence.

The Workflow Suite provides the efficiency and security of rules-based routing and monitoring while also supporting ad hoc participation in the workflow environment.

Laserfiche Workflow Suite Highlights

- ▶ Eliminate the paper shuffle with efficient routing services.
- ▶ Easily model work processes with an intuitive user interface.
- ▶ Improve productivity and accountability with automatic notifications.
- ▶ Achieve rules-based effectiveness that is flexible enough to allow professionals to use their judgment.
- ▶ Dynamic folder creation generates folder structures based on index field information.
- ▶ Workload balancing distributes documents evenly among team members.
- ▶ The Workflow Suite is part of a proven family of document management solutions.

Identify and Relieve Work Bottlenecks

The intuitive graphical user interface allows administrators to make a visual model of work processes throughout your office. This model makes it easy to identify redundancies and wasteful document routing procedures. Your system administrator can then design rules-based routing systems that streamline document-handling procedures without placing undue restrictions on the way your staff work.

Information Finds You

The Laserfiche Workflow Suite's routing services copy and move documents via your computer network. Based on administrator-defined rules, the Workflow Suite puts documents in the hands of decision makers when they need them, while also allowing ad hoc decision making. Your staff spend less time searching for information and more time acting on it.

Maintain Constant Productivity

Busy system administrators and records managers, whose staff are sometimes spread among several buildings, need an effective way to ensure that work proceeds on time and according to procedure. The Laserfiche Workflow Suite provides automatic e-mail notifications when specified events, such as placement of a document in a folder or a change in an index field, occur or do not occur in your Laserfiche database. This keeps supervisors in the know and keeps business moving, regardless of absent or geographically dispersed staff. Automatic notifications offer assistance for supervisors to monitor efficiency and speed projects toward completion.

Workflow at Work

Your system administrator uses the Work Distribution Manager to model your office's work procedures and establish routing rules to guide documents throughout your office. The Work Distribution Agent then follows those rules to move documents to another person's folder or copy documents that need to be reviewed in multiple locations. When the Work Distribution Agent detects an event specified by the Work Distribution Manager—when a supervisor changes an index field to Approved, for example—the Agent performs the required moving or copying.

This setup, while effectively moving documents to the right person, does not prohibit workflow-on-the-fly. For instance, if a properly authorized person needs to search for a document and drag it into someone else's folder, the Workflow Suite will accommodate that practical necessity.

The notification feature automatically e-mails appropriate staff when designated events take place. A supervisor can be notified, for instance, when a staff member opens a certain document. An acknowledgment timer also allows the supervisor to be notified if the document remains unopened for a specified period of time.