

## Workflow Suite™

### Intelligent Workflow for Knowledge Workers

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

#### The Problems with Paper Traffic

Your organization's knowledge workers search for information, act on it, move it and archive it every day. This process, with its manual searching, faxing, photocopying and hand distribution, is costly and time-consuming. The inefficiencies of the process divert your staff from the crucial business of making productive use of the information.

#### Make Decisions, Not Copies

A successful workflow solution automates this paper shuffle, effectively routing information to appropriate persons while being flexible enough to handle exceptions to the rules. It saves time and money by reducing photocopying, hand delivery and repetitive dragging and dropping. It automatically reminds staff of required tasks and notifies supervisors of action and inaction. It treats your staff not as stations along an assembly line, but as responsible knowledge workers 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 error or 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

- ▶ Easily model work processes with intuitive user interface.
- ▶ Automate the paper shuffle with efficient routing services.
- ▶ Maintain productivity with automatic notification.
- ▶ Improve accountability with the Advanced Audit Trail option.
- ▶ Obtain rules-based effectiveness that is flexible enough to allow knowledge workers to use their judgment.
- ▶ Dynamic folder creation automatically builds folder structures based on index field information.
- ▶ Workload balancing automatically distributes documents evenly among work group members.
- ▶ Provides the stability and ease-of-use shared by all Laserfiche systems.
- ▶ 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 guarantee efficient document movement 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 things moving, regardless of absent or geographically dispersed staff.

## **Improve Efficiency and Accountability**

The Advanced Audit Trail option monitors and provides custom reports on user activity. Supervisors can review the performance of scanner operators, for example, or make sure users are tending to a designated number of documents each day. Advanced Audit Trail, coupled with automatic notifications, offers powerful assistance for supervisors to monitor efficiency and guarantee project completion.

## **How the Workflow Suite Works**

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. 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 Work Distribution Agent then follows those rules to automatically 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—a supervisor's selecting Approved in an index field, for example—the Agent performs the required moving or copying.

The notification service 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.

The Advanced Audit Trail option provides additional monitoring services for security and workflow. Advanced Audit Trail monitors client activities such as printing, faxing and e-mailing documents and creates a log of actions performed. Administrators and supervisors can then generate efficiency reports from the Audit Trail logs.

### **The Next Step**

Please call (800) 782-5201 or e-mail [calger@calger.com](mailto:calger@calger.com) to request your free demo CD.