



### Control your business processes with automated workflows.

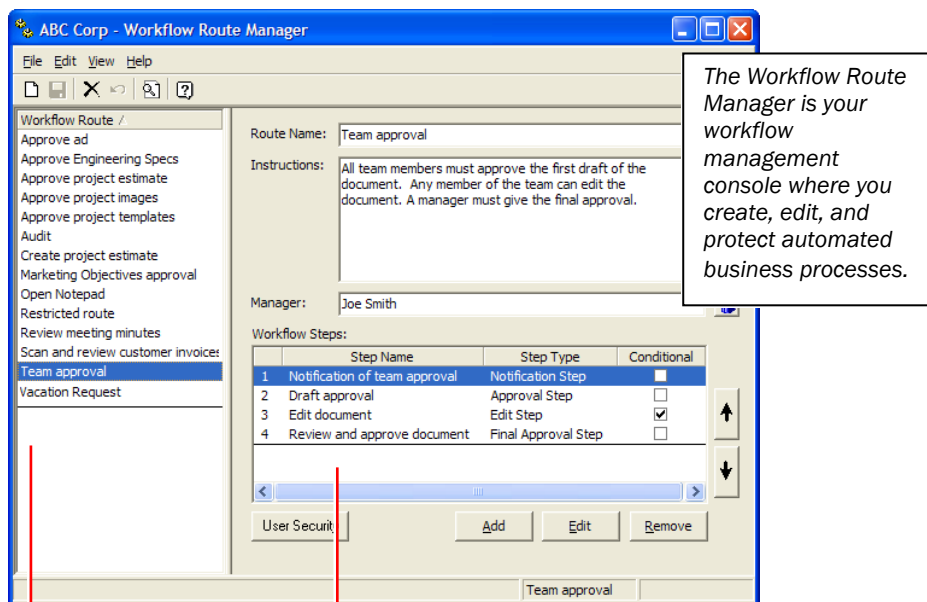
Every day, information workers in your organization collaborate to get work done, usually by creating, receiving, routing, reviewing, or approving documents. In some cases, the process is defined and routine, in other cases ad hoc. In any case, automating the flow of work through these processes can significantly cut costs and improve your organization's efficiency. Furthermore, defining and automating business processes can lead to process improvements—changes that are hard to make without the consistency and structure that automation provides.

The optional Automated Workflow Module combines a variety of step types and step actions with comprehensive management features to give you extensive control over your business workflows.

- Capture and automate virtually any type of business process.
- Take advantage of the modular build style to reuse steps, branch workflow routes, and connect one workflow route to another.
- Use workflow management tools to help keep workflows moving, track progress, and provide a searchable history of all workflows.

### Benefits

- **Automated business processes** – Optimizes business processes, making them repeatable, measurable, and secure.
- **Standardized processes** – Defines business processes and enforces adherence to company procedures.
- **Improved collaboration** – Automates task routing, ensuring all the right people participate.
- **Greater accountability** – Maintains a secure audit trail, giving management access to all workflow history.



*The Workflow Route Manager is your workflow management console where you create, edit, and protect automated business processes.*

Step Name	Step Type	Conditional
1 Notification of team approval	Notification Step	<input type="checkbox"/>
2 Draft approval	Approval Step	<input type="checkbox"/>
3 Edit document	Edit Step	<input checked="" type="checkbox"/>
4 Review and approve document	Final Approval Step	<input type="checkbox"/>

Workflows you create are listed here.

Created steps display here. You can add, edit, remove, and reorder steps as needed.

### Solutions

- **Compliance** – Control important business processes to ensure company-wide consistency and adherence to regulations.
- **Workgroup collaboration** – Use team steps to allow any member of a team to complete assigned workflow tasks.
- **Business accounting** – Automate and standardize purchase approval processes.
- **Production information management** – Improve efficiency and lower production costs by automating and managing information that drives production processes.

## Automate virtually any type of business process.

Document approvals that include edit steps are just the beginning. The wide variety of available steps, including manual process steps, conditional steps, yes/no decision steps, custom action steps and more, enable you to automate everything from simple vacation requests to complicated vendor submittal processes involving numerous people and hundreds of documents. You can even include “pause” steps that let you build in needed additional time, for example, to accommodate manual tasks outside the workflow.

## Build flexibility, reuse, into your workflows.

Once you’ve created a workflow route, you can reuse it and change it as needed.

- Link automated workflow routes together or to external business applications for additional automation.
- Assign workflow steps to teams. Team steps allow any member of the assigned team to accept and complete the step task.
- Attach templates and other related documents to workflow routes so users don’t have to search for them to complete a task, and to ensure the right documents are used in a project.

## Manage workflows.

Administrators and workflow route managers can build in fail-safe features and backup strategies to keep processes moving.

- Keep workflows running on schedule by setting task time limits so that the workflow route does not linger too long at any point in the process.
- Use reminder messages for workflow steps to ensure that users stay aware of critical time limits for completing tasks.
- Assign alternate workers to workflow steps to ensure that tasks don’t “fall through the cracks” if someone gets ill or can’t meet a deadline.
- Override a workflow. Administrators and workflow managers can cancel or take control of a workflow that cannot be completed or that hits an unexpected snag.

Monitor workflow progress and access workflow history.

- Keep track of workflows that you’ve submitted by viewing them in your Submitted Tasks folder.
- Always know which task is the active one along a workflow’s route. The Task Console and Workflow Details window enable you to see immediately which tasks have been completed and which are still pending.
- Always have access to workflow history for all workflows, whether in progress, completed, or even canceled or terminated. The Workflow History window lets you search on almost any aspect of a workflow: dates, subject, participants, status, related documents, notes, and more.

## Related Features

- **Custom Action Manager** – Enable Document Locator to interact with third-party applications and custom applications.
- **Document Approval** – Use Document Locator’s standard notification and approval feature to create and reuse basic document approval workflows.
- **Email Management** – Create rules to import and manage your email messages and attachments in Document Locator. Create rules that automatically start a workflow when email is imported.\*
- **Importing Documents** – Request a workflow for documents as they are imported to the repository.
- **Microsoft Integration** – Keep workers in a familiar environment. Seamless integration with Windows and Microsoft Office makes using automated workflows even easier.
- **Web Access** – Enable off-site users connecting through a Web browser to participate in workflows.\*
- **Workflow History** – Search on all workflows in any of your repositories.

For more information about products or purchasing, please visit:

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

**ColumbiaSoft Corporation**  
10300 SW Greenburg Rd.  
Suite 180  
Portland, OR 97223  
(503) 274-0504  
(800) 298-1172

\*Optional module required.



Seamless  
Windows  
Integration

**ColumbiaSoft™**  
Capture, Manage, and Share Information

800.298.1172 | [www.DocumentLocator.com](http://www.DocumentLocator.com)