Xythos

software, inc.

Xythos Workflow
Workflow designed for business workers

DATASHEET

Xythos Workflow for Enterprise Document Manager enables knowledge workers to easily automate complex document centric business processes. With Xythos Workflow, organizations can ensure consistent business processes and improve productivity by helping team members concentrate on performing tasks rather than managing the workflow. The easy-to-use business logic in Xythos Workflow specifies and controls the actions that happen to documents or content, keeping projects on schedule and content safe.

Benefits

Easy-to-use
Gone are the days when business users require development assistance to create and manage document-centric workflow processes. With your business processes in mind and a few simple selections, Xythos Workflow provides all of the critical components of workflow in one easy-to-use Web application.

Enhance productivity
Standardized processes mean that team members are freed from the administrative tasks associated with document management. Workflow processes can be added to any document or folder automating standardized and repetitive tasks such as tagging, approving, routing and indexing. Complex workflow scenarios can be easily created to enhance even the most multifaceted business processes and shared to enable organization-wide efficiencies.

Improve accuracy
Eliminate error-prone tasks, oversights, and training with Xythos Workflow. When organizations eliminate redundant and time-consuming tasks they can assure consistent practices between employees and departments – even with participants outside of the organization.

Reduce IT Costs
Xythos Workflow lowers the cost associated with assigning resources to create and develop complex workflow processes. Departments can now create, edit and manage workflow processes for individual documents, folders or entire file structures without ever requiring IT department assistance.

"We now have a distributed and secure management system where we can appoint people, create an area in Xythos for their users, show them how to enable and disable audit trails, version control etc. – and from then they are in charge of their own systems. This is a marked departure from the classic file server model we used previously."

Wayne Wilson
Director of Technical Services
for Medical School Information
Systems
University of Michigan

Features

Workflow templates

Workflow templates allow users to create, store and modify workflows for common business processes which occur in the Enterprise Document Manager. Activities can include automated actions (copy document, move document, tag document, etc) or tasks that must be completed by an individual (approval, review, etc). Workflow participants can receive email alerts with instructions and a link to the appropriate document. Workflows may also be exchanged between various Xythos systems or copied within a Xythos instance to create similar processes.

Workflow security

Because document-centric processes can sometimes involve sensitive or confidential data, associated workflows must be able to control who can view and administer these processes. Xythos Workflow enables administrators to flexibly control access to workflow functionality and content through workflow abilities, permissions on templates and permissions on documents and folders.

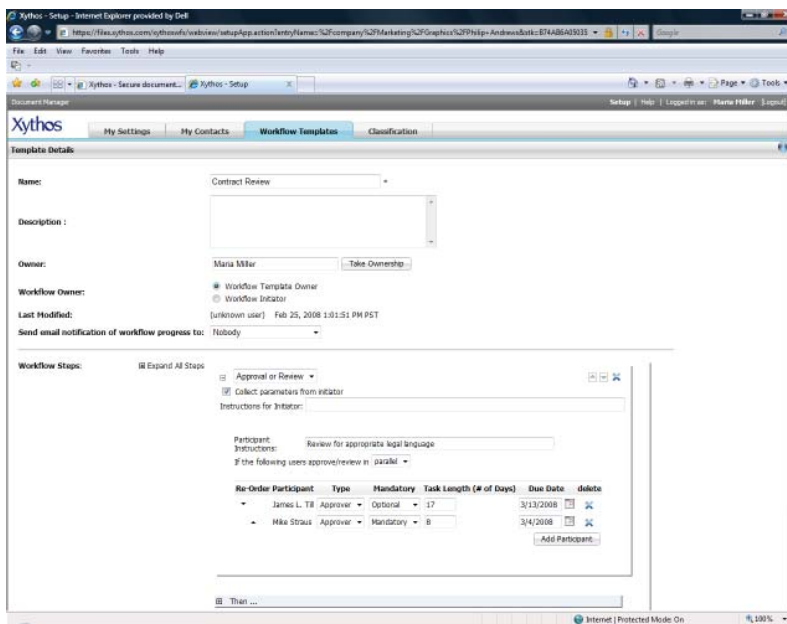## Extensibility and custom workflows

Organizations may choose to develop and deploy completely custom workflows that are unique to their business processes and Xythos Workflow helps to make that possible. Developers can build custom actions and application logic into workflows that can perform more advanced workflow tasks – even interact with other applications such as CRM or ERP systems, as well as seamlessly integrate with OOTB workflow UIs.

Using Xythos Workflow

Xythos Workflow puts you in the drivers seat with the easy to use workflow builder

The steps required to create and use Xythos Workflow include a few simple selections. Each step may be completed by individuals in different roles, either simultaneously or sequentially. For example, a site administrator might make a workflow available for use on a specific document library, a content owner or document author might begin a workflow on a document, and a third person (for example, a document a reviewer or an approver) might complete a workflow task. Workflows can also be designed to activate when a new document or subfolder is created within a document library. This is particularly useful when a "drop box" for sales contracts, expense reports or design approvals has been created in the Xythos Enterprise Document Manager. Users don't even need to know that they are participating in a workflow process; only that business processes require certain actions.

When a workflow begins, it can create approval tasks or assign tasks to workflow participants. It can then send e-mail alerts to team members with assignment instructions and links to the document(s) that need to be approved.

While the workflow is in progress, workflow participants can check the Status page to see who has completed their tasks. When participants complete their associated tasks, the workflow ends. The workflow automatically takes the appropriate actions on the document, and it alerts the workflow owner regarding the outcome of the workflow.

Workflow template editor

Allows users to create, share, import and export the step-by-step business processes for libraries, documents and content. Steps, or tasks, may be assigned to various participants within or outside the organization. Save time by repurposing workflow templates for various tasks – simply rename the template to create a "customized" look.

Target Permissions

In order for users to be able to participate in a workflow (e.g. as an approver or reviewer), they must have "read" permissions on the specific library or document. Non-Enterprise Document Manager users can also be added to a workflow, with the "Share" functionality. The Xythos Workflow module recognizes if the user has permissions to "share" the library or document and will prompt the user to decide if they want to add or correct permissions when the workflow is generated.

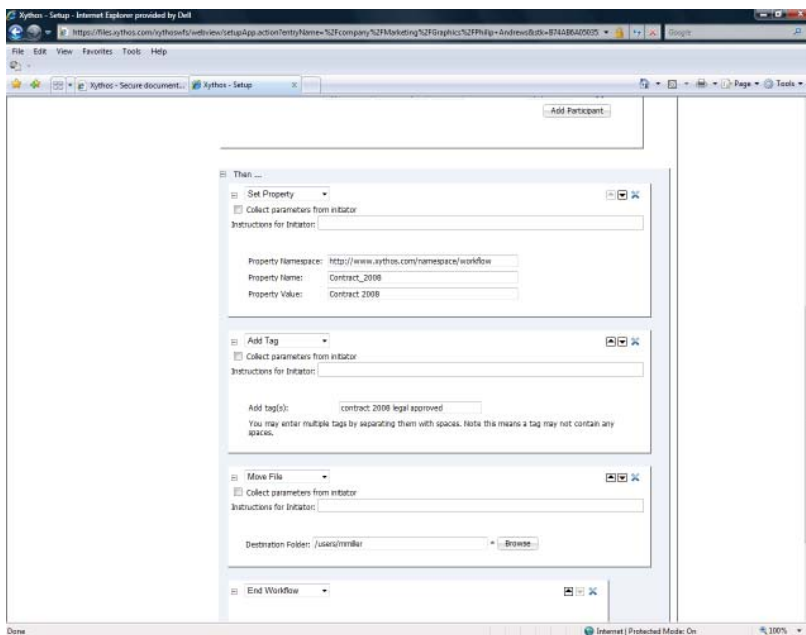*Xythos Workflow enables users to easily customize workflows.*

Tasks

Tasks are the individual actions requiring human interaction that are generated by a running workflow. All of the workflow tasks assigned to users, regardless of the document, are displayed under the Tasks menu. Depending on how the workflow has been defined, users may or may not be required to take action on specific tasks. Regardless, workflow tasks remain in the Tasks list until they expire or the user takes action.

Creating workflows

Creating a workflow in Enterprise Document Manager is easy. First, ensure that you have read/write permissions to the library, content or document. Then select the library or document, and choose the "Start Workflow" option from the right-click menu. From here, select an existing "workflow template" from the drop-down menu, or create a new one. Xythos Workflow enables users to customize how workflows are initiated, who owns the workflow and even who should be notified regarding workflow progress. Next, simply add workflow steps, provide task instructions and select workflow participants. Choose "save" and the new workflow is ready to begin.

Getting started - approval process workflow

Getting started with Xythos Workflow has never been easier. Enterprise Document Manager ships one pre-defined workflow template, "Approval Process", which is shared to all workflow users. Once the default workflow has been started, the participants of that workflow will receive two forms of notification. First, they will receive an email with a link which leads them to the Xythos Web UI where they can participate. They will also receive an assignment under Tasks. When a participant selects the email link or the link under Tasks, they will be presented with a listing of all current tasks. Clicking the name of the document will open the document; clicking the name of the task will provide an opportunity to make comments and select their task option, depending on the type of participant.

Xythos is the document management partner of choice

If organizations need to:

• Streamline common business processes and functions
• Provide consistent and standard document lifecycle management
• Enhance productivity by automating administrative tasks

Consider Xythos.

Xythos Workflow is part of the Xythos Enterprise Document Management Suite. Find out more about how Xythos' secure document management and collaboration solutions empower organizations to reduce costs, improve accountability and protect enterprise–wide content collaboration. For more information, visit www.xythos.com.

For more information please call 1.888.4XYTHOS
or visit www.xythos.com

Xythos Software 655 Montgomery Street, 16th Floor San Francisco, CA 94111