Xerox® DocuShare® Content Management Platform

Automate Business Processes to Boost Workflow Efficiency.

User-defined Workflows in Xerox® DocuShare®

BUSINESS WORKFLOW AUTOMATION

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

Xerox® DocuShare® provides three simple, business-friendly tools to quickly automate workflows: notifications, **document routing**, and **content rules**.

RECEIVE NOTIFICATIONS WHEN CHANGES OCCUR

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

- Add content to a collection or remove 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 essential part of ensuring that document security is maintained during collaborative workflow processes.

Xerox DocuShare - Workflows in Action
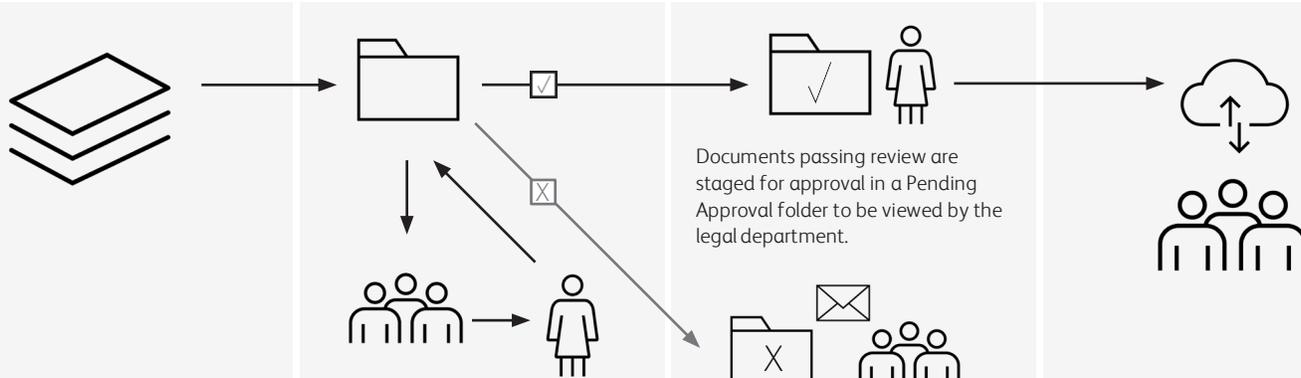
Users scan or upload documents to a Review folder with a pre-set content rule.

Documents are automatically routed to the project team for input and then to the team manager for approval.

Documents passing review are staged for approval in a Pending Approval folder to be viewed by the legal department.

Documents added to Rejected folder generate a notification to the project team.

Once approved, documents are published and made available to the public.

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User-friendly routing slips also offer significant flexibility and give registered users complete 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.

- 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 option is well suited for many 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 an excellent 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 settings in the routing slip).

- 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 users to quickly 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 for the rule action to activate), and the action itself. Unlike review and approval, which require a person to act on a document to change its state in the workflow, content rules can automatically vary document properties or a document state without human intervention. For instance, content rules can mark specific 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 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).

Xerox® DocuShare® helps knowledge workers simplify and streamline their personal and office work experience and helps enterprises optimize and automate key business processes.

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.

Learn more at: **xerox.com/ecm**