

Automated Workflow

Repetitive and mundane tasks hamper the efficiency of a business. Manual paper trails are often riddled with errors and delays. Allowing your document management software to handle your document centric business processes can make them more streamlined, more accurate and less time consuming. You can now forget about delays and errors typically associated with circulating paper manually. Electronic workflows ensure that your work is completed at the right time, by the right person and gives you full insight and traceability into your business processes.

Say good bye to messy paper trail and welcome the new way to speed up and track your business activities.

Highlights

- ✓ Create simple or complex workflow cycles without any coding using a simple point and click graphical interface
- ✓ Automate and speed up repeatable processes for account payables, leave applications, document revisions, purchase authorizations, etc.
- ✓ Save time and money by electronically moving documents around the workplace for review & approvals
- ✓ Track workflow items as they move through the system
- ✓ Identify bottlenecks in your processes to improve speed of execution for all your business tasks
- ✓ Automate notifications for prompt action and supervision
- ✓ Add secure digital signatures to documents for approvals and sign offs.

What it means for you?

We can all agree on how manual paper trail suffers from process errors causing unacceptable delays that ultimately eat into our overall productivity. Automated Workflow reduces the time spent on day to day business activities and improves its accuracy and traceability. The time savings can be easily translated to cost savings in terms of process cycle costs, labor cost and time-to-market costs. With electronic workflows you never have to worry about important documents getting lost or buried under paper stacks while they are under some process.

Solutions

Quick Scan

Scan files from anywhere, anytime

Paperless Office

Convert all your files to digital documents and make way for a paperless office

Other Paperless Tools

PDF Editor

Slice, dice and assemble PDFs, annotate them with highlights, notes and custom stamps and edit text and images in PDFs

Automated Workflow

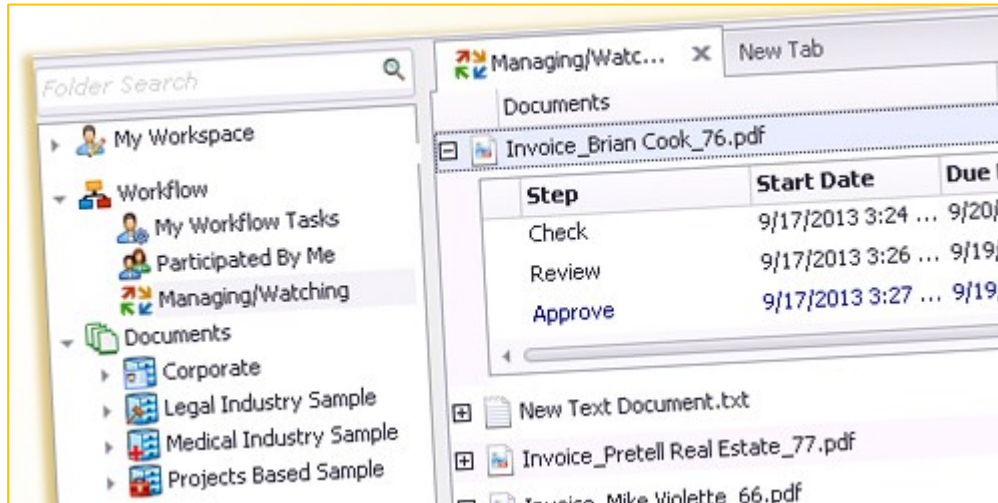
Create multi-step work process with scanned documents to supercharge a paperless working environment

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Workflow in Docsvault presents a clear picture of tasks at hand for responsible participants. Transitions are performed without manual routing of documents and many background tasks are executed automatically. Actions performed on all steps of the workflow are logged for future reference and can be queried to examine any steps causing delays in the process.



Workflow Process

Features:

- Design simple linear workflows or advanced non-linear multi directional workflows
- Build a complex workflow in a short time using the user friendly graphical interface
- Predefine workflow routes for different types of documents depending on their document profile
- Initiate workflow on multiple documents including folders
- Manual or automatic initiation of workflows using location or document profile triggers
- Hide workflow documents while under revision or approval process
- Designate proper access to workflows by specifying initiators, participants, watches or managers role to users
- Option to assign participants on the fly for the next step of the workflow instead of the predefined participants list
- Prompt and mandate workflow participant to fill out comments and necessary information before moving the workflow further
- Option to return the workflow to any previous step and assign it dynamically to previous participant only or the initiator of the workflow
- Set workflow priority to promote specific workflow instances
- Attach reference documents to different steps of the workflow to aid in decision making for workflow participants.
- Export workflow documents and their profile metadata automatically to a predefined location
- Define automatic actions to be performed on workflow documents when a workflow is initiated, completed or transitioned from one step to another
- Generate automatic email notifications for various users as the workflow progresses
- Be notified, if more than one participants are viewing the same workflow step

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- Set due dates and overdue actions and notifications for workflow steps
- Send reminders for pending tasks on demand with a single click
- Set frequency and intervals for overdue auto reminders for workflow steps
- Set current user's name as index value to dynamically set author, approver, etc.
- Add dynamic Participants to any workflow step using "Users/Groups" dynamic index field
- Assign dynamic dates for indexes during the workflow process
- Move/Copy main documents along with their attachments during workflows to a predefined or dynamically generated folder
- Auto increment/decrement for numeric or alphabet values of indexes to track a revision process
- Option to auto-create PDF versions during the workflow process
- Define your own user choices and their corresponding effects on workflow instead of the standard Yes/No or Approve/Reject options
- Allow multiple digital signatures on a document for approvals
- Take Ownership of a workflow step thereby claiming the workflow task and relieving other participants
- Allow users to automatically delegate workflow tasks to other users while on vacation or on an ad hoc bases as needed
- Attach supporting documents from the computer and from Docsvault repository and add user comments as the workflow progresses
- Option to append user comments during workflow to document notes of the main workflow document
- Get list of all reference docs attached during the workflow process in a single click
- Configure workflows for multiple approvals for high value and important documents
- Require system password for approvals (or any other important activity) to verify user identity
- Complete workflow history logging for all workflow actions performed
- Generate reports on workflows to identify problem areas that slow down business processes
- Automatically trigger back to back workflows on documents

Fast facts

1. Shipping costs, retrieval time, and duplication issues are eliminated
2. Allows you to set complex multi-step workflow process or a simple Approve/Reject process
3. Clone entire workflows making it simple to create multiple similar workflows
4. Helps meet compliance and quality regulations
5. No coding required even for most complex workflow scenarios

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