

## XenDocs Workflow

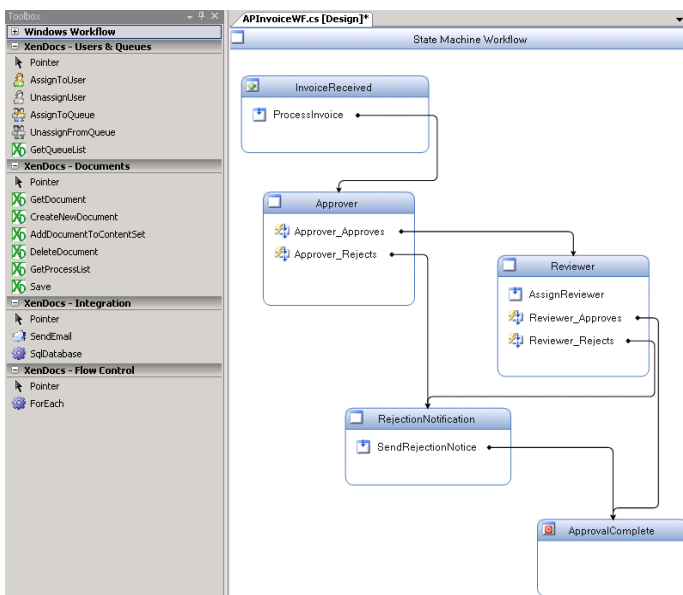
### The Power of XenDocs Workflow

XenDocs offers much more than traditional document management. XenDocs Workflow provides sophisticated and customizable business process management and automation (BPM/BPA) capabilities to precisely address your most challenging document-based business processes.

Using XenDocs Workflow, organizations can affordably deploy enterprise class BPA solutions, enabling documents to be automatically routed to the appropriate people at the right time, while also interacting with your existing applications and databases. Workflow processes are defined graphically and are fully customizable, according to your business rules, no matter how complex.

### Designing a Workflow

XenDocs Workflow provides a graphical user interface that allows designers to view and manipulate processes by dragging workflow tasks (activities) from a toolbox onto the process design surface. The workflow toolbox is organized into customizable sections, enabling you to work the way you want.



XenDocs Workflow is based on Windows Workflow Foundation, allowing workflow processes to be designed using Microsoft's Visual Studio development environment. While simple workflow processes can be easily designed in a purely graphical environment, Visual Studio makes it easy for developers to customize the most complex workflows imaginable with Visual Basic.NET or C# code.

### Activities

Activities are the building blocks of workflow. Each activity has various properties that are used to control how the activity will respond when the workflow is processed. The values for each property can be set to a static value or to dynamic information such as index values from XenDocs, a database query or a web service.

XenDocs Workflow includes many standard activities for both XenDocs and Windows Workflow that can be immediately used by simply dragging the activity from the toolbox to the design surface.

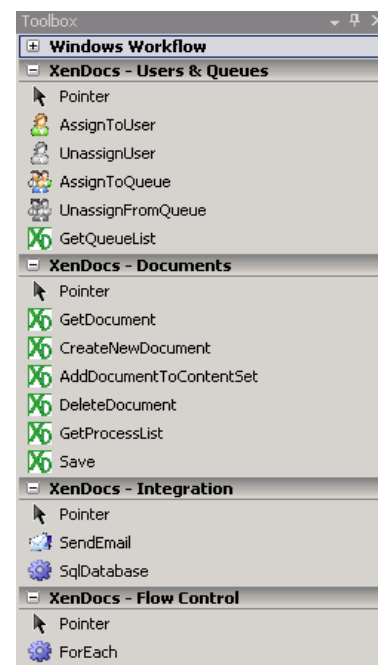
### Windows Workflow Activities

Windows Workflow provides an extensive library of activities for managing flow control, integration with web services, custom code, exception handling and transactions.

### XenDocs Activities

XenDocs provides the following types of activities:

- *Document Management* – XenDocs provides various automated document management activities such as routing documents to specific users or shared work queues, creating annotations and performing OCR.
- *Integration* – XenDocs includes activities that enable sophisticated database and email integration without custom programming.



- **Flow Control** – XenDocs Workflow allows each document within a group of documents to be processed automatically, using a custom “for each” activity. This enables more sophisticated forms of parallel document routing than is provided with many other workflow solutions.

### Custom Activity Creation

In addition to the core set of standard activities that are included with XenDocs, custom activities can be created in C# or VB.NET for specific business purposes. Custom activities can then be added to the workflow toolbox and re-used like the standard activities.

## Using a Workflow

### Web-based Document Routing

The workflow engine is integrated with XenDocs, allowing users to access workflow-driven documents from shared work queues or their personal inbox within the XenDocs website.

### Email Notification

XenDocs' Workflow can automatically send emails to notify users of incoming documents that need to be approved. It can also send reminder emails to let a user know how many items are still in their inbox for approval. These notifications, along with the frequency of them, can be set by the Administrator.

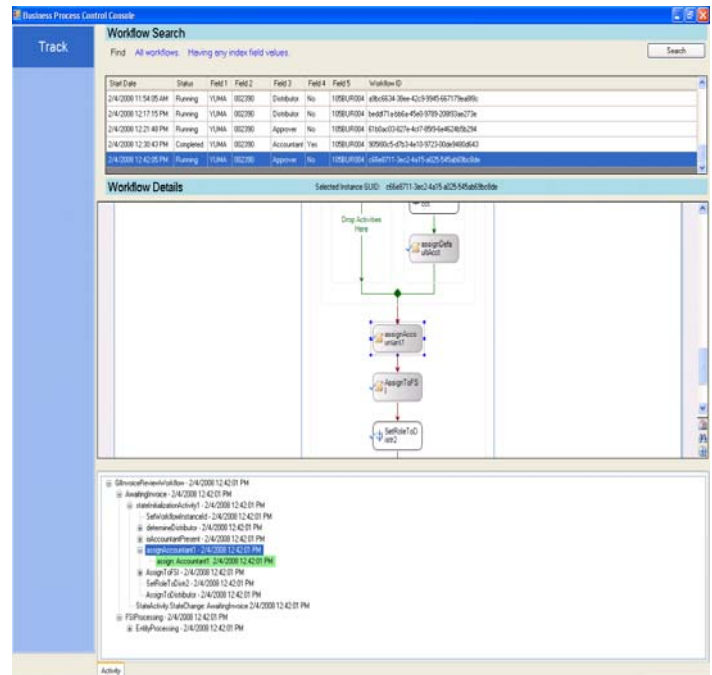
### Form Edit

XenDocs' Workflow can display sophisticated forms that enable users to edit data including related data records, such as an invoice and its line items.

## Monitoring a Workflow

### Business Process Control Console (BPCC)

The BPCC allows users an easy way to search and troubleshoot in-progress and completed workflows. The BPCC displays a graphical process map of the workflow and provides the ability to drill down into workflow details.



### Intuitive Search

Organizations may have hundreds or thousands of workflows in process at any given time, so the BPCC allows business administrators to easily search the system to find the status of specific workflows. The BPCC intelligently guides the user to progressively refine their query with selectable, plain English search phrases. The user can search the workflow by relevant status values and of any document's index field values.

### Process Debugging

Workflow design users can visually inspect an executing workflow within the process designer. These users can “pause” the workflow and view its internal state, to determine how/why it took a specific path through the workflow process.

### Custom Reporting

The data collected by the workflow system is stored in SQL Server and is readily available to reports from SQL Server Reporting Services or Crystal Reports. Possibilities include user performance metrics, index field-driven performance metrics, as well as a summary or dashboard style reports.