EXEL

Data Sheet - Workflow

The EFACS E/8 Workflow module automates business procedures and improves operational efficiency. Workflow provides a framework for automating the flow of a company's business procedures via the software, allowing EFACS E/8 to be utilised more effectively with the users specific requirements regarding the automated flow of data through the system.

The capabilities of the Workflow module framework are broad, meaning Workflow can be used in numerous circumstances. Uses can include the simple creation of data as well as actions that react from specific processes, ranging from the activation of a sales order through to the facilitation of complete organisational procedures where multiple sign-offs are required, such as approvals in the purchasing process.

The integration of EFACS E/8 with mail and task features of standard office automation products results in a control mechanism that helps to ensure that the right work is done at the correct time, by the right people and in a proper sequence.

The EFACS Workflow module may be configured to send information to users triggered by events within EFACS. For example, the receipt of a purchase order might trigger an email to be sent to the accounts department containing the details of that order. A staff member within that department will then be able to accept or reject the order by selecting an option from a form in the message. Multiple messages may be sent to a number of recipients, showing the full information or selected details as appropriate.

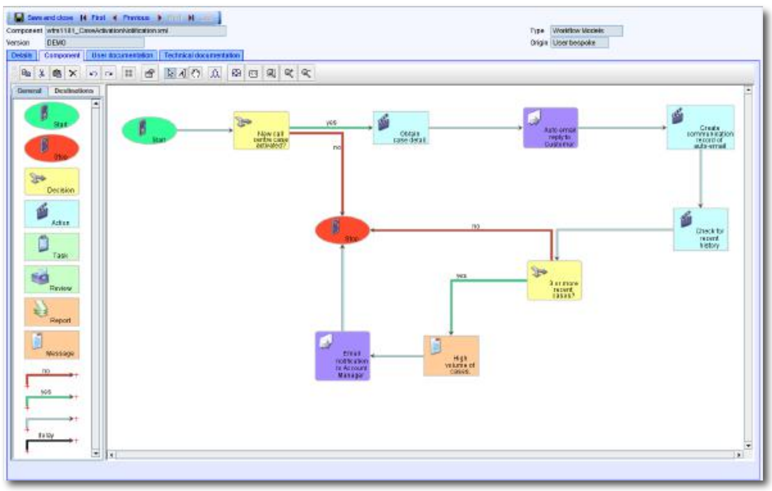
Workflow utilises a time monitoring system which is incorporated into each workflow task in order to identify how long a task has taken to complete and whether this is within preset boundaries. If actions are not carried out in a timely manner, escalation messages can be automatically generated and sent to relevant staff. These features will help to ensure that customers are not let down through key people being on holiday, being busy or through poor internal procedures.

Workflow Models

A Graphical User Interface (GUI) is provided for building a workflow model, much like drawing a flow diagram, in order to conveniently visualise the process path and the decisions required, dependent on the outcome of certain events.

Each workflow model consists of a number of action, decision, task and review steps. These can then generate reports and messages which can be distributed by email, SMS or printed copy.

Easy to use 'drag-and-drop' interaction allows workflow nodes to be placed in appropriate stages of a process flow between the 'Start' and 'Stop' nodes and then interconnected accordingly.



Each node is assigned a set of attributes that characterise the properties required. Behind each node the user can add further script code to carry out certain tests and operations. This allows information on the EFACS system to be checked and compared, and then updated if necessary.

Multiple revisions of the models can be stored and managed, this allows a full history to be retained, as well as allowing new models to be developed prior to making them live.

Scheduled Workflow

It is possible to run workflows at specific times. The Manage Workflow Schedules application allows you to specify a particular workflow model and the times at which you would like it to run.

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Summary

- Monitors the business system looking for events taking place. When an event occurs this can initiate a series of further actions within the organisation.
- Allows emails, tasks, SMS messages, etc. to be automatically sent as events occur within the system.
- Users can accept or reject tasks sent to them by selecting an option from a form within the message that they received.
- Escalation and alerting procedures can be put into place. If a particular user does not respond to a task in the prescribed timeframe then escalation processes can be automatically generated, and other appropriate staff informed.
- The combination of Workflow and Document Management provides a powerful document review system. Documents can be passed from one user to the next, with each user making auditable changes if necessary before passing on to the next user.
- Properly incorporated into the day-to-day business of the company, EFACS E/8 Workflow delivers substantial business benefits.

Filescan

Filescan is an automated tool used for improving accuracy and operational efficiency, this tool utilises Workflow as part of its process.

Filescan is used to monitor predefined network directories for either incoming or outgoing documents; not only does Filescan monitor these directories, it will scan the document for relevant information and enact a preset procedure dependent upon certain configurable criteria utilising the Workflow module.

All document types are able to be processed. Filescan can extract data from text-based files, XML files and Spreadsheets (including latest versions of Microsoft Excel files such as *.xlsx), a copy of the file itself is then held on the database allowing the contents to be logically processed with rules that can be defined within a workflow.

When sending documents, the creator of a document will either adhere to the recipient's database structure regarding column titles, or have previously provided details of the content and the relevance of each column reference used.

This allows Workflow to understand the data and from this the workflow process will be able to determine the nature of the document, for example a sales order, and without manual input it is able to create that sales order against the relevant client; this may then trigger other workflows, for example an automated email to the client regarding stock status or a delivery date estimate.

The use of XML/CSV/XLSX files enables the efficient and accurate transfer of data between companies for documents such as sales orders and purchase orders through to the creation of Parts, BOM's and Routings. Other documents such as PDF, which are unable to have data extracted from them, for example an invoice, can be filed and managed by a workflow after Filescan has scanned the document title, which will follow a predetermined policy so as to identify the client or supplier as well as any other pertinent information such as a sales reference.

Filescan can be configured to monitor the directories at set times with each directory having the ability to be configured independently, e.g. for urgent files such as sales or purchase orders you can set the scan for every five minutes, or every second if needed, whilst for non-urgent documents you might potentially want to set that to every 24hrs.

Filescan offers the benefits of: guaranteed data accuracy, highly efficient inputting of data, a fast turnaround and is fully automated.

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