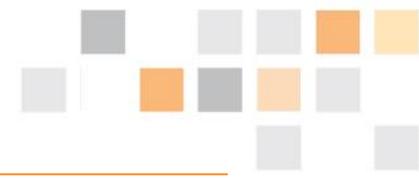




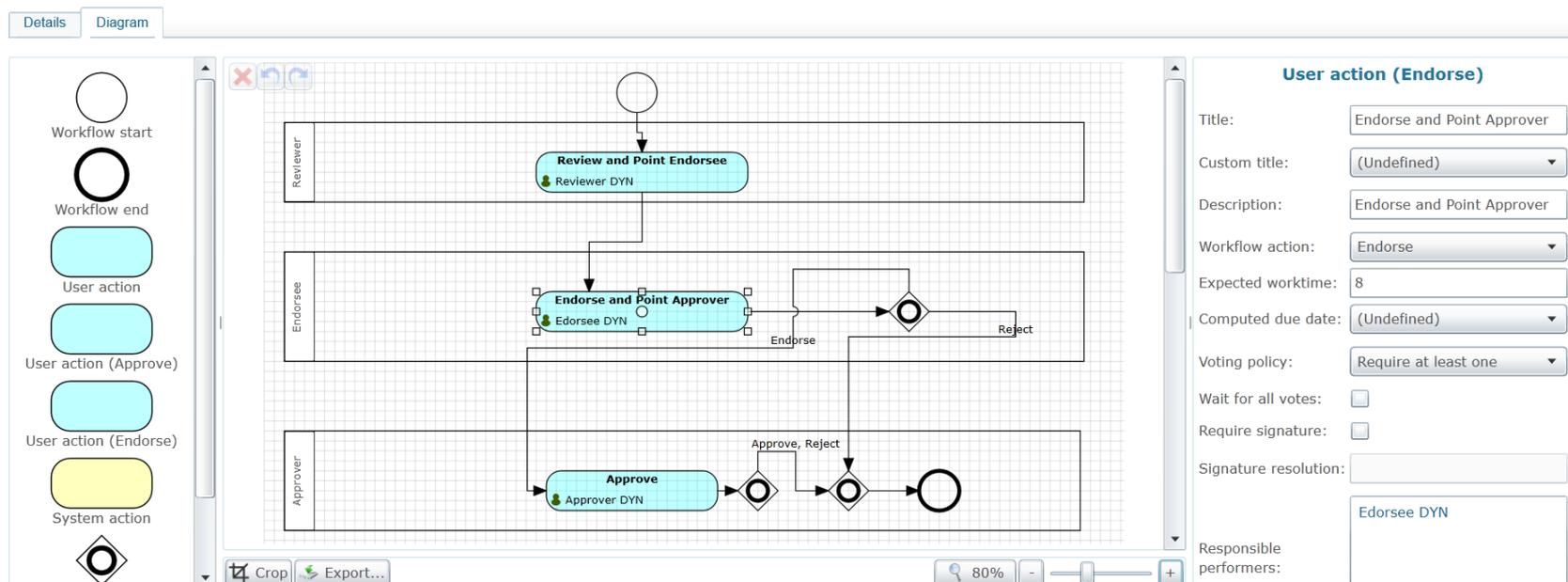
DocLogix workflow – functional overview

www.doclogix.com

1. VISUAL MODELER.

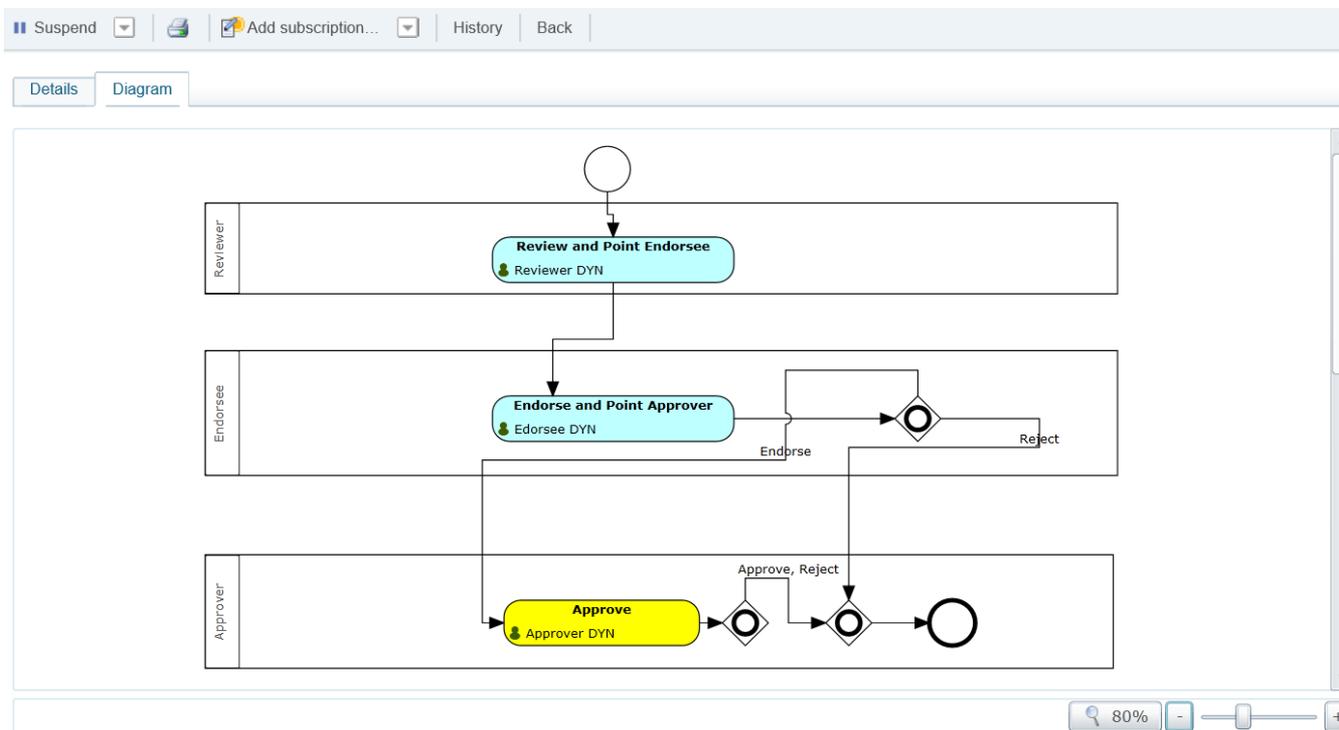


- Workflow management module is designed to be used by non IT specialist
- No additional applications required. Module works directly from WEB interface
- Drag & Drop method



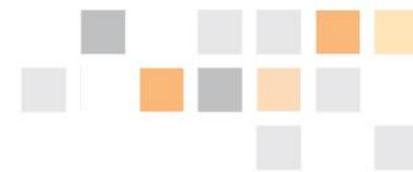


Graphical and table type indication of flow stage



Steps:

	No.	Step title	Workflow action	Started	Responsible performers
✓ ↕	6	Review and Point Endorsee	Review	2015.04.14 15:44:39	Reviewer DYN
✓ ↕	7	Endorse and Point Approver	Endorse	2015.04.28 12:35:27	Endorsee DYN
! ↕	8	Approve	Approve	2015.04.28 12:36:05	Approver DYN



• In column visualization of active workflow step

Home PURCHASE Documents Tasks Contacts Search and reports Administration About

Documents and records User: James

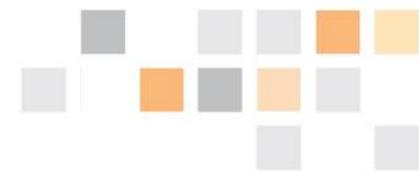
New workspace Open

New document [icon] [icon] [icon] [icon] Filter [icon]

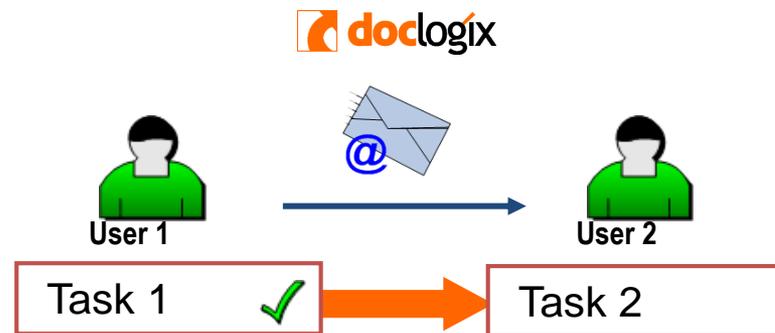
	Status	Nr	Title	Type	Priori
[icon]	DEP » FIN » PUR	20	test ap	Production items	Norm
[icon]	DEP » FIN » PUR	19	john's request	Subcontractor services	Norm
[icon]	DEP » FIN » PUR	18	new design controler	Production items	High
[icon]	DEP » FIN » PUR	17	electronic components to extend steering range	Production items	Norm
[icon]	DEP » FIN » PUR	16	copy multi machine		Norm
[icon]	DEP » FIN » PUR	15	training of accountance level 7		Norm
[icon]	DEP » FIN » PUR	14	new pruchase of tv		High
[icon]	DEP » FIN » PUR	13	new sofa		Norm
[icon]	DEP » FIN » PUR	11	test MK		Norm
	REJECTED	10	another NEW REQ		Norm
	APPROVED	8	another request		Norm

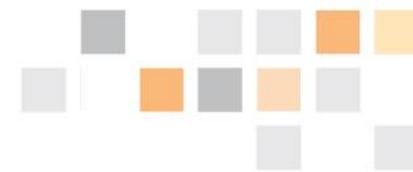
Company Documents

- I. PURCHASE.
 - 1. REQUESTS
 - 2. Proposals.
 - 3. ORDERS.
 - 4. Receptions.
 - 5. INVOICES.
- II. SETUP.
- Company Registrations
- Company Templates

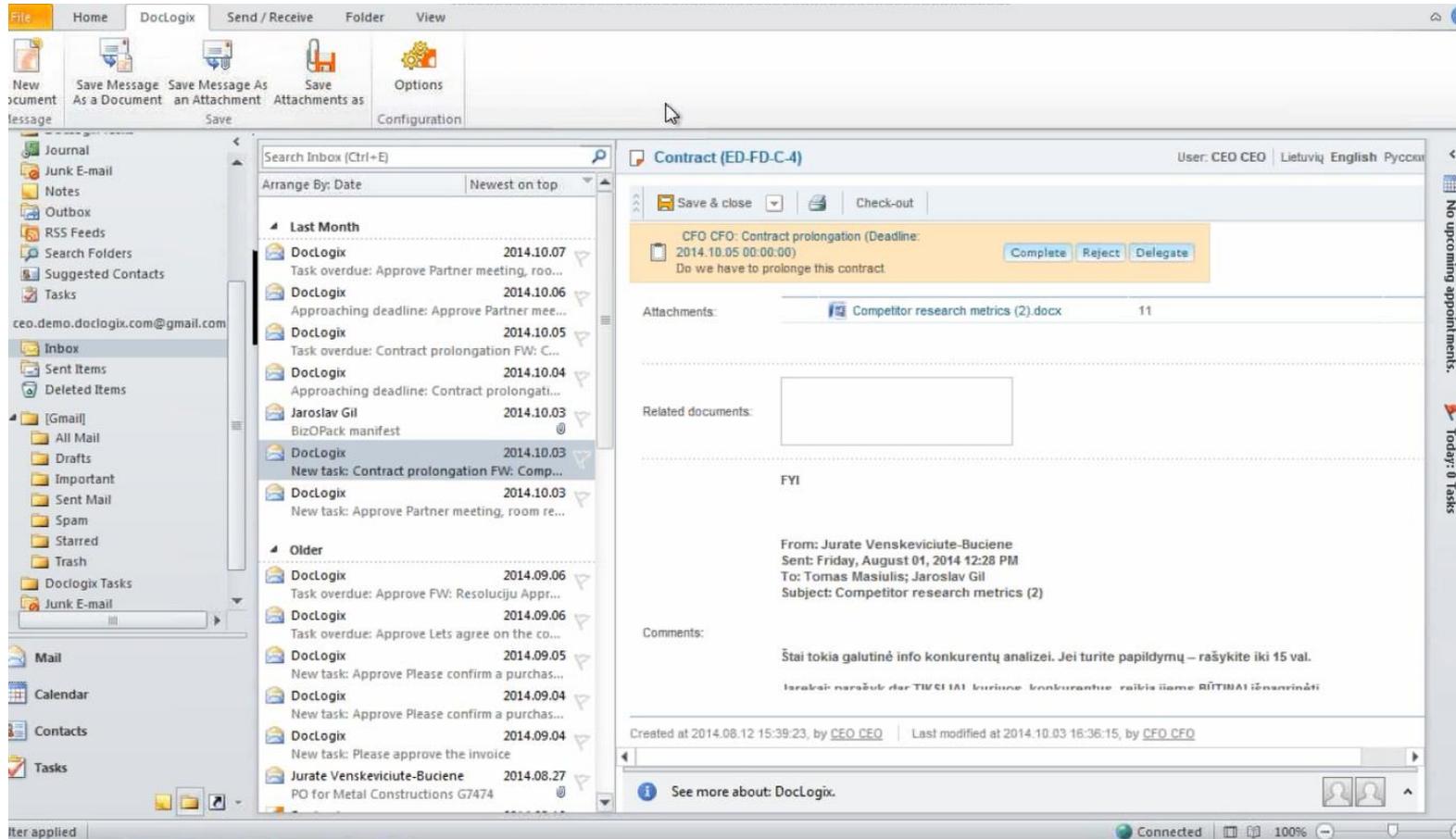


- Workflow actions:
 - Assign the task,
 - Overdue (pending, becomes),
- Defined time norms for workflow steps

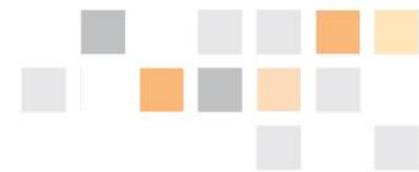




•• Email content or link



The screenshot displays the DocLogix web interface. The top navigation bar includes 'File', 'Home', 'DocLogix', 'Send / Receive', 'Folder', and 'View'. Below this is a ribbon with options like 'New document', 'Save Message As a Document', 'Save Message As an Attachment', 'Save Attachments as', and 'Options Configuration'. The left sidebar shows a folder structure including 'Journal', 'Junk E-mail', 'Notes', 'Outbox', 'RSS Feeds', 'Search Folders', 'Suggested Contacts', 'Tasks', 'Inbox', 'Sent Items', 'Deleted Items', and various folders under '[Gmail]'. The main area is split into two panes. The left pane shows a list of emails under 'Search Inbox (Ctrl+E)', arranged by date. The right pane shows the details of the selected email, 'Contract (ED-FD-C-4)'. The email content includes a task reminder: 'CFD CFD: Contract prolongation (Deadline: 2014.10.05 00:00:00) Do we have to prolong this contract'. It also lists an attachment 'Competitor research metrics (2).docx' and a message from 'Jurate Venskeviute-Buciene' dated Friday, August 01, 2014 12:28 PM. The subject is 'Competitor research metrics (2)'. The message body contains Lithuanian text: 'Štai tokia galutinė info konkurentų analizei. Jei turite papildymų – rašykite iki 15 val. Išrašai parašyti dar TIKŠIAI kuriame konkuruojame rašiusiame RŪTINAI išsiaiškinti!'. The interface also shows a 'No upcoming appointments.' notification and a 'Today: 0 Tasks' indicator on the right side.



- : Dedicated ribbon to the document with active task assigned for logged in user

Home Documents Contracts Tasks Contacts Search and reports Administration About

 example report

Save & close Back

 Administrator 1: Approve (Deadline: 2015.04.29 11:36:05) Complete Reject

General

Nr: 16

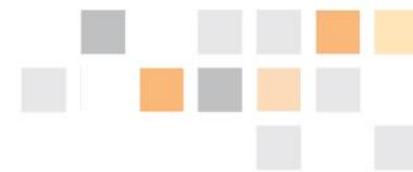
Title: * example report

Material: MATERIAL D

Notes:

Reviewer: * Administrator 1

	Title	File size (KB)
File:	 TEST DOCUMENT	11



Workflow and single tasks (assignments and tasks)

Task User: Administrator 1 | All documents | Lietuvių English Пыцьк

New assignment Filter

Title	Document	Action	% Complete	Start	Due	Responsible performers
Prepare answer	Proposal from Southeast Community College	Handle resolution	0 %	2014.08.10		CFO CFO
Resolve	Proposal from Southeast Community College	Handle resolution	0 %	2015.01.08		Specialist 2
for me			0 %	2015.05.08		Administrator 1
sth			0 %	2015.05.08		Maciek Kasp
! Prepare answer	Proposal from Southeast Community College	Handle resolution	0 %	2014.08.10	2014.08.11	CFO CFO
! Review	FW: Resoluciju Approveris version 1	Endorse	0 %	2014.08.27	2014.08.28	Specialist 1
! Approve	dok	Approve	0 %	2014.09.03	2014.09.03	Department Manager (dynamic)
! Review	ggg	Review	100 %	2014.09.04	2014.09.05	Administrator 1
! Approve	Please confirm a purchase order	Approve	0 %	2014.09.05	2014.09.05	Department Manager (dynamic)
! Approve	Purchase order for approval Stationary	Approve	0 %	2014.09.05	2014.09.08	Department Manager (dynamic)
! What to do?	Marketing report for approval	Handle resolution	0 %	2014.10.23	2014.10.24	CFO CFO
! Check the amount	Disclosure forms for approval	Handle resolution	0 %	2014.11.10	2014.11.11	CEO CEO
! Save the problem	Disclosure forms for approval	Handle resolution	0 %	2014.11.10	2014.11.11	Specialist 1
! Approve	new doc	Approve	0 %	2015.04.14	2015.04.15	Approver DYN
! Approve	another material testing rep	Approve	0 %	2015.04.14	2015.04.15	Approver DYN
! Review and Point Endorsee	creation of document	Review	0 %	2015.04.14	2015.04.15	Reviewer DYN
! Approve	example report	Approve	0 %	2015.04.28	2015.04.29	Approver DYN
! Review and Point Endorsee	new doc	Review	0 %	2015.05.01	2015.05.04	Reviewer DYN
! Review and Point Endorsee	test flow	Review	0 %	2015.05.07	2015.05.08	Reviewer DYN, Maciek Kasp
! Review and Point Endorsee	new flow	Review	0 %	2015.05.08	2015.05.11	Reviewer DYN

Tasks

Total active: 9

New: 0

Resolutions for approval: 0

Active: 9

Attention: 0

Completed: 5

Overdue: 7

Closed: 40

Assignments

Total active: 20

Completed: 8

Overdue: 15

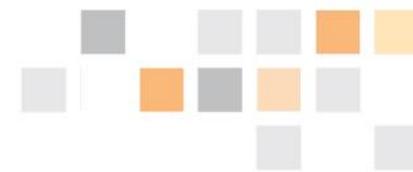
Closed: 42

Delegated: 1

Waiting for

Workflows

Other



DocLogix homepage user dedicated task dashboard

Home Documents Contracts Tasks Contacts Search and reports Administration About
doclogix

Home page
DocLogix User: Administrator 1
All documents
Lietuvių English Русский



Change...

Picture of the day
Click here to change the picture of the day

Companies

Persons

Announcements

Title	Announcement	Announced
2015-05-30, 16:00 - preparation meeting for ISO 9001 Audit	Hello. On 2015-06-21 we have scheduled ISO 9001 Audit renewal. We have to prepare to it on this meeting.	2015.04.14 10:49:20

Pending checkins

Doc. no.	Title	Profile	Version	Attachments
MTR-14	creation of document	Material Testing Report	3.0	
OFF-INC-2	Disclosure forms for approval	Incoming document	2.0	
OFF-INC-8	Electronic document	Incoming document	2.0	
ED-PR-PO-10	ggg	Purchase Order	1.2	
MTR-18	new doc	Material Testing Report	3.0	
ED-FD-C-1	Photo authorization agreement	Contract	2.0	
class code-myfile-4	test	MK PROF TEST	1.0	

Tasks

Tasks	Count
New	0
Active	10
Overdue	8

Assignments

Assignments	Count
Completed	8
Overdue	16

Waiting for

Waiting for	Count
Approve	5
Review	3

Notifications

Date	Object	Action
2015.05.11 01:00:38	Approve	Remind
2015.05.11 01:00:35	Review and Point Endorsee	Remind

Reports

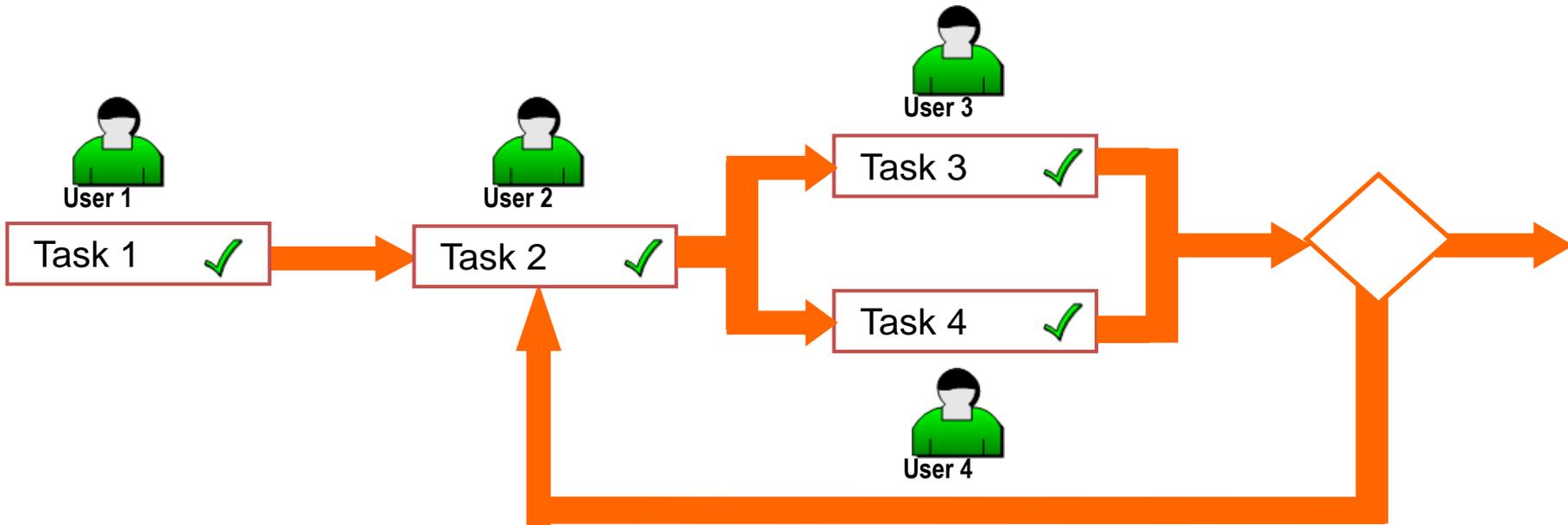
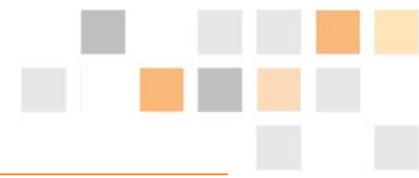
Tasks report

This week

Status	Count	Percentage
On	13	59.1%
Delayed	5	22.7%
Reject...	2	18.2%

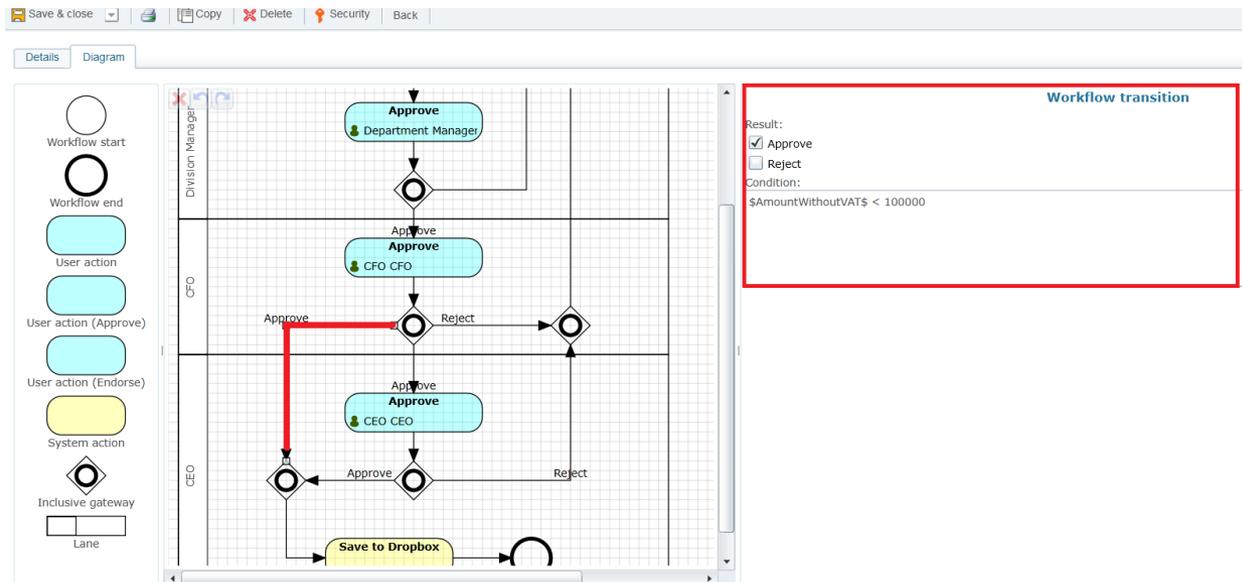
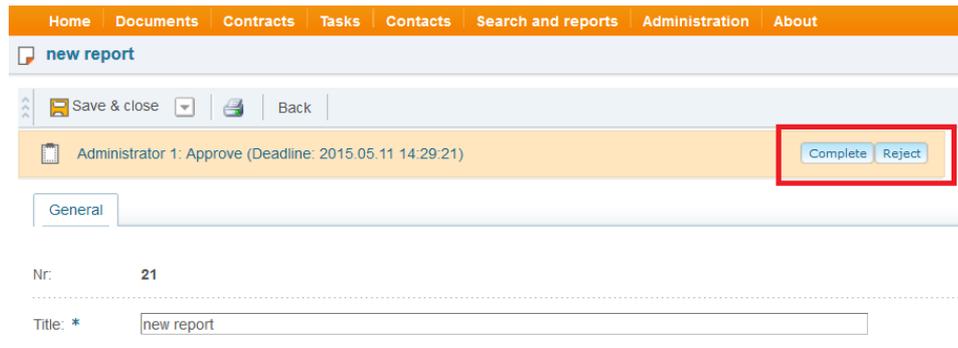
Active tasks

Task	Document	Start	Due	Supervisor
Approve	dok	2014.09.03	2014.09.03	Administrator 1
Approve	Purchase order for approval Stationary	2014.09.05	2014.09.08	Administrator 1
ngngngn		2014.09.12	2014.09.19	WeKey Admin
Approve	another material testing rep	2015.04.14	2015.04.15	Administrator 1
Review and Point Endorsee	creation of document	2015.04.14	2015.04.15	Administrator 1
Approve	example report	2015.04.28	2015.04.29	Administrator 1
Review and Point Endorsee	new doc	2015.05.01	2015.05.04	Administrator 1
for me		2015.05.08		Administrator 1
Review and Point Endorsee	new flow	2015.05.08	2015.05.11	Administrator 1
Approve	new report	2015.05.08	2015.05.11	Administrator 1



8. Transitions.

- User decision (Accept / Reject)
- Parameter as condition for flow through the branch





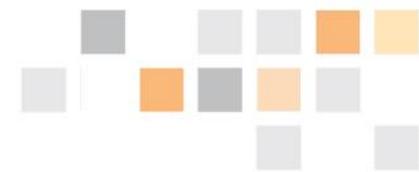
Methods of completing

		All	Majority	1+
 User 4	Task 4	✓	✓	
 User 3	Task 3	✓	✓	✓
 User 2	Task 2	✓	✓	
 User 1	Task 1	✓		

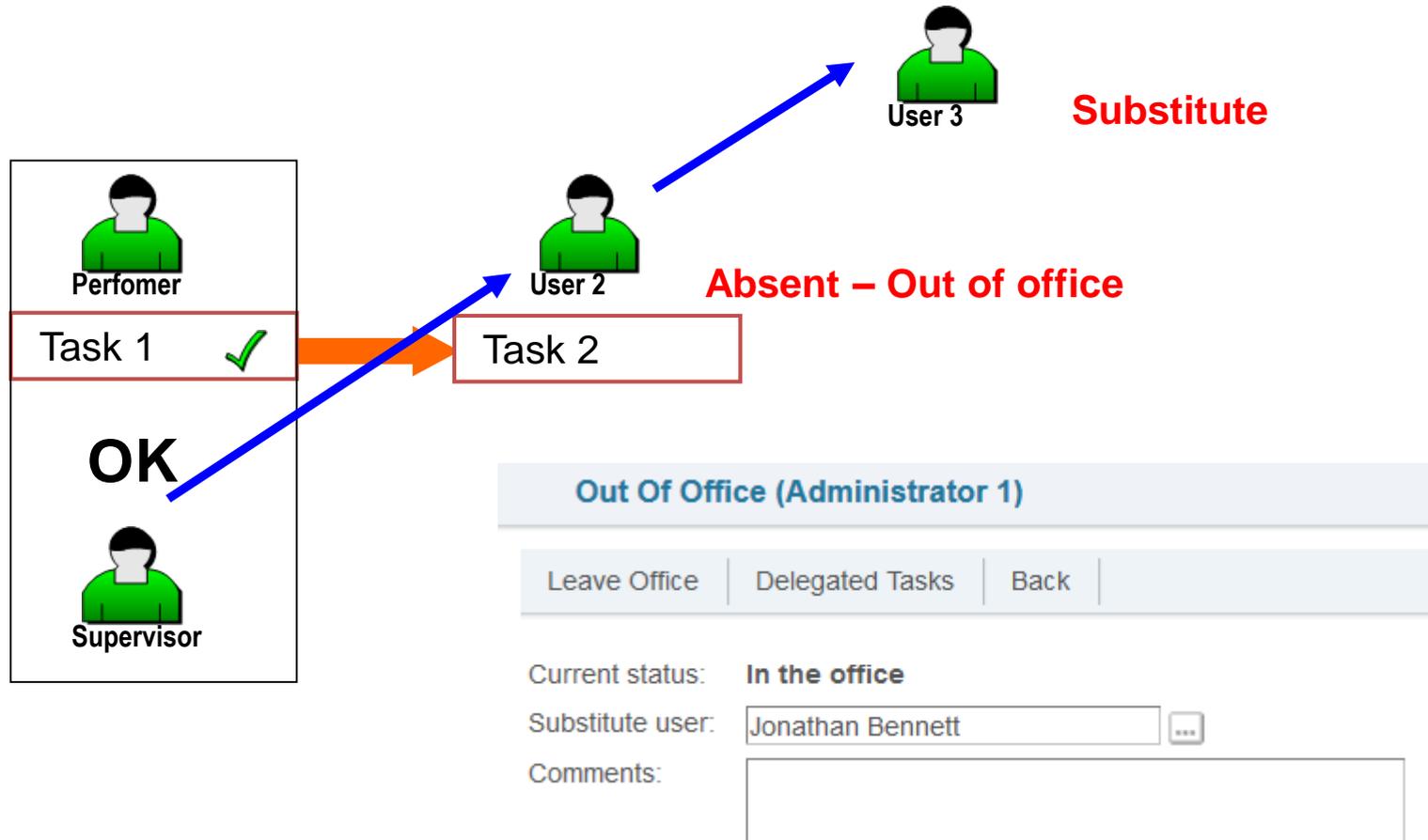
Step 1 ✓



Step 2



- Out of office functionality – point substitute (by user himself or his supervisor),
- Automatic delegation to substitutes



11. Delegation tracking and task log.



 Incoming document (OFF-INC-1, ER-RJ-INC-3) User: Administrator 1

>>>
Save & close
Back

Document
Execution
Classification
Administration

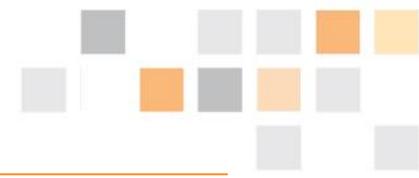
Mark:

Resolution history:

-  2014.08.10 CEO CEO Deadline 2014.08.12
 -  1 Prepare answer  CFO CFO (2014.08.10 Finished)
 -  1 Prepare answer  Accountant 1 (2014.08.10 Finished)
-  2015.01.08 Administrator 1
 -  1 Resolve  Specialist 2 (Not read)

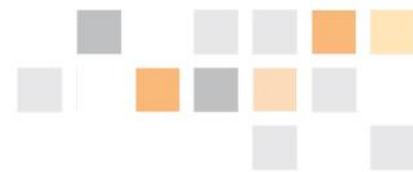
Task log:

Start	Initiator	Title	Responsible performers	% Complete	Completed	Performer comment	Due
2014.08.10 00:00:00	CEO CEO	Prepare answer	CFO CFO	100	2014.08.10 14:19:34		2014.08.12 00:00:00
2014.08.10 00:00:00	CFO CFO	Prepare answer	Accountant 1	100	2014.08.10 14:19:34		2014.08.12 00:00:00
2015.01.08 00:00:00	Administrator 1	Resolve	Specialist 2	0			



- Temporary permissions assignment for the responsible performer of the task to the linked document - on the basis of permission of workflow initiator to the document,

13. Dynamic assignment of responsible performer of next step / -s.



Save Back Delete Security Back

General

Title: * test report

Material: * MATERIAL C

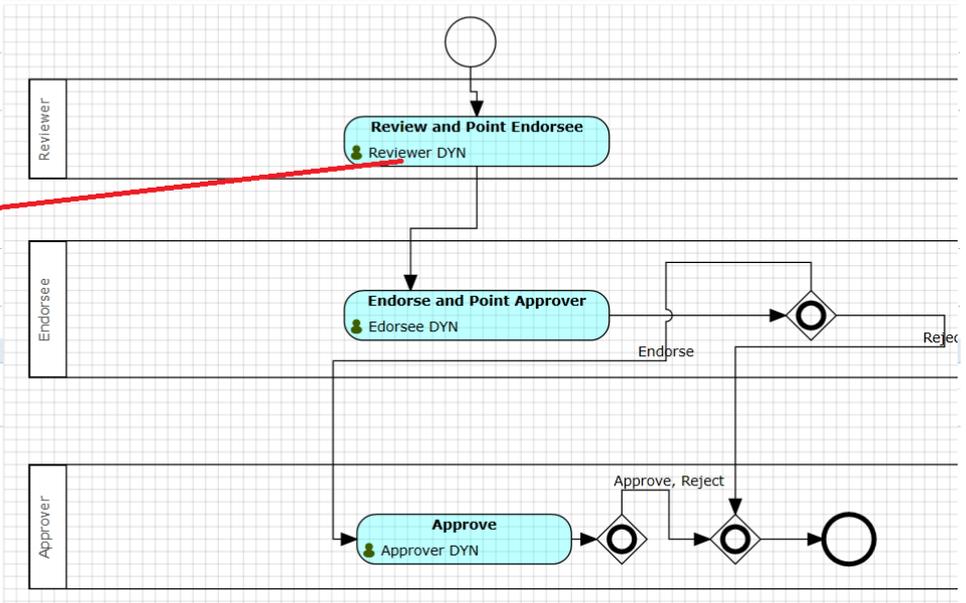
Notes: some notes

Reviewer: * Administrator 1

Attachments have been successfully attached

Title	File size (KB)
TEST DOCUMENT	11

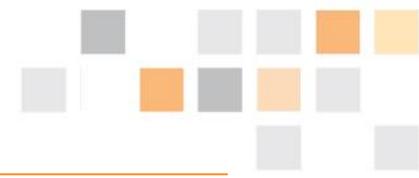
File: Add attachments | From template | From scanner...



```

    graph TD
      Start(( )) --> Reviewer[Review and Point Endorsee  
Reviewer DYN]
      Reviewer --> Endorsee[Endorse and Point Approver  
Endorsee DYN]
      Endorsee -- Endorse --> Approver[Approve  
Approver DYN]
      Endorsee -- Reject --> Dec1{ }
      Dec1 --> Endorsee
      Approver -- Approve --> End(( ))
      Approver -- Reject --> Dec2{ }
      Dec2 --> Endorsee
  
```

13. Dynamic assignment of responsible performer of next step / -s.



- You do not have to statically assign responsible performer of every workflow step before the workflow's initiated
- No administrator action is needed to point responsible performer for any of the next steps of initiated workflow.

The solution:

- Dynamic group of users is assigned for workflow step,
- It's content is resolved by the chosen attribute from document form (to which workflow instance is applied). It can be done automatically (the supervisor of the user who is entering the document) or manually,
- Certain document form tab can be shown only for certain document workflow step. This way the user can obtain in easy way the attributes he has to fill out on certain workflow step.

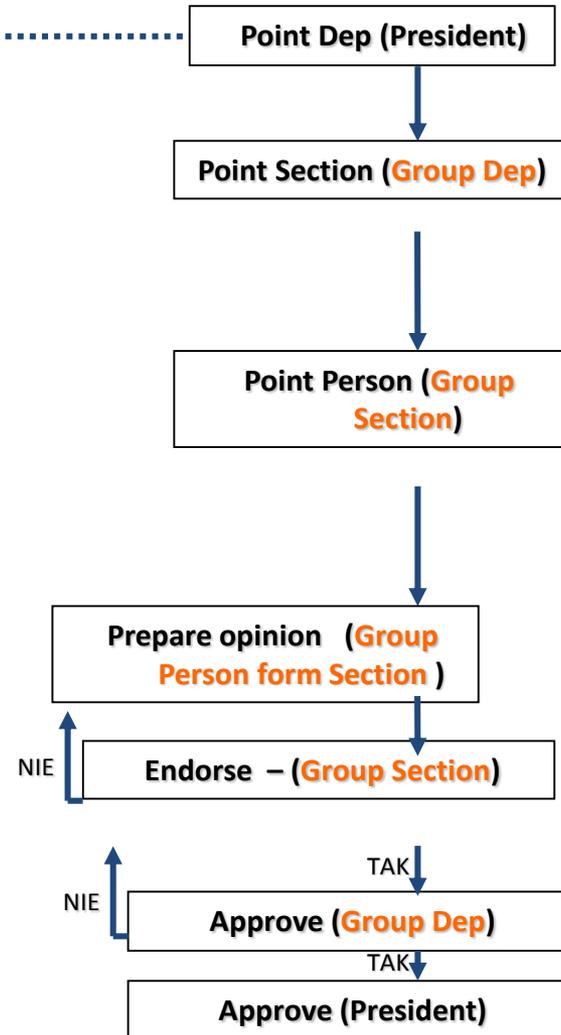
Claims example

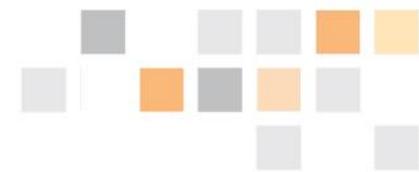


CLAIM FORM

Department Person

Section





- : Commitment of assignments,
- : Require comments,

General Advanced

Task sender: * Administrator 1

Task supervisor: * Administrator 1

Co-responsible performers:
Search...

Document:

Linked documents:
[Add/Remove...](#)

Start date: 2015.05.11

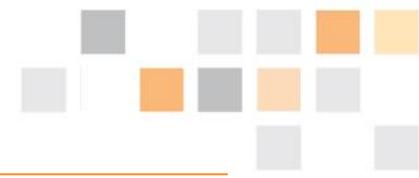
Workflow action: (Undefined)

Auto-commit:

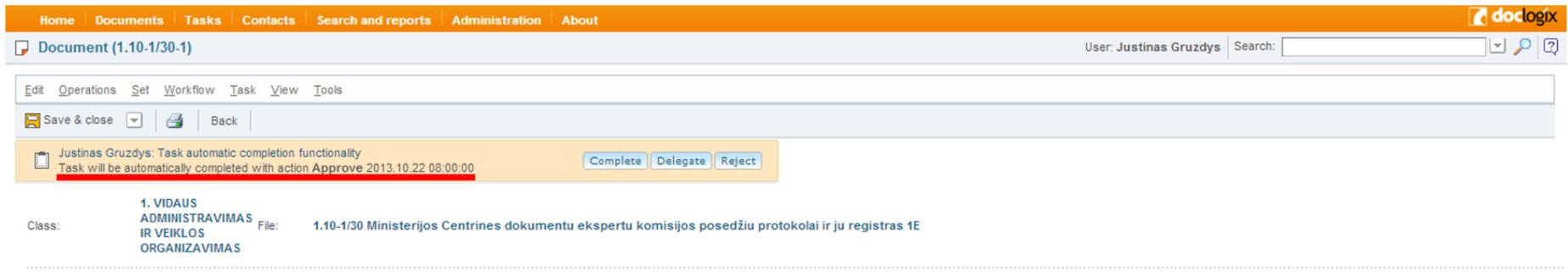
Delegation:

Parallel:

Comment required:

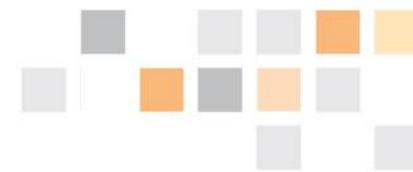


- : Automatically closing (Approve / Reject / Retain) highly overdue steps,
- : Set up time email reminders for the user himself (especially long term dates)



The screenshot displays the doclogix web application interface. At the top, there is a navigation bar with links for Home, Documents, Tasks, Contacts, Search and reports, Administration, and About. The user is identified as Justinas Grudzys. Below the navigation bar, there is a document header for "Document (1.10-1/30-1)" and a search bar. A menu bar includes options like Edit, Operations, Set, Workflow, Task, View, and Tools. A "Save & close" button is visible. A notification banner for Justinas Grudzys states: "Task automatic completion functionality. Task will be automatically completed with action Approve 2013.10.22 08:00:00". Below this, there are buttons for Complete, Delegate, and Reject. The document details section shows the Class as "1. VIDAUS ADMINISTRAVIMAS IR VEIKLOS ORGANIZAVIMAS" and the File as "1.10-1/30 Ministerijos Centrinės dokumentu ekspertų komisijos posėdžių protokolai ir jų registras 1E".

16. System action type task In workflow functionality.



Example: email delivery,

Workflow template User: Administrator 1 | All documents

Save & close | Copy | Delete | Security | Back

Details | Diagram

Workflow start

Workflow end

User action

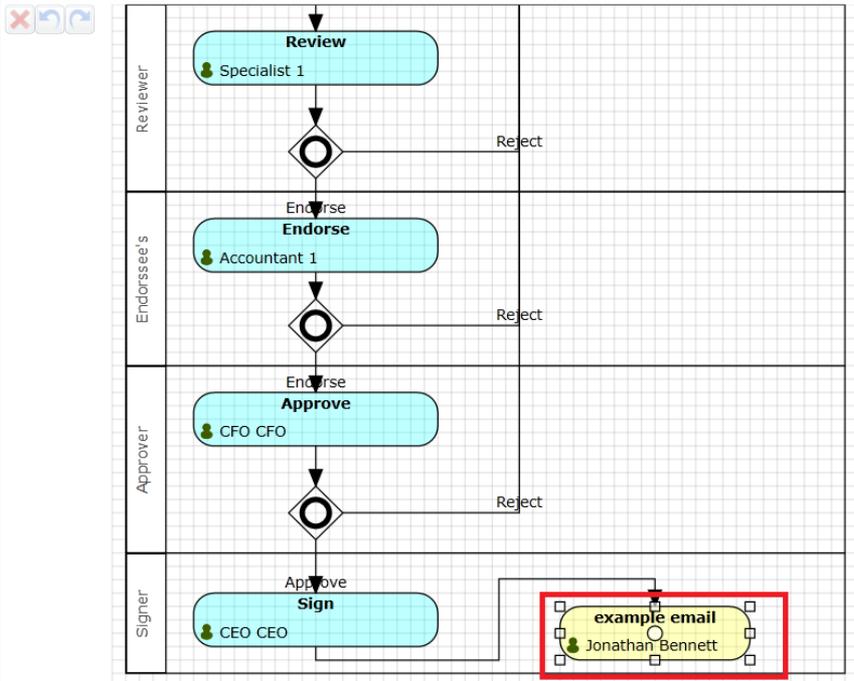
User action (Approve)

User action (Endorse)

System action

Inclusive gateway

Lane



```

graph TD
    subgraph Reviewer
        R1[Review Specialist 1] --> D1{ }
        D1 -- Reject --> SA1[System action]
    end
    subgraph Endorsee's
        E1[Endorse Accountant 1] --> D2{ }
        D2 -- Reject --> SA2[System action]
    end
    subgraph Approver
        A1[Endorse Approve CFO CFO] --> D3{ }
        D3 -- Reject --> SA3[System action]
    end
    subgraph Signer
        S1[Approve Sign CEO CEO] --> SA4[System action]
    end
    SA1 --> SA4
    SA2 --> SA4
    SA3 --> SA4
    SA4 --> SA4
    
```

System action

System action: Automatic e-mail delivery

Title: example email

Description: description

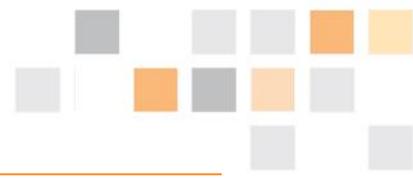
Recipients: Jonathan Bennett

From: Administrator 1

Subject: example email titel

Body: Hello,
Please note that ...
examplent content

Include attachments:



DocLogix mobile – is about reaching your tasks on the go and execute business decisions away from the office

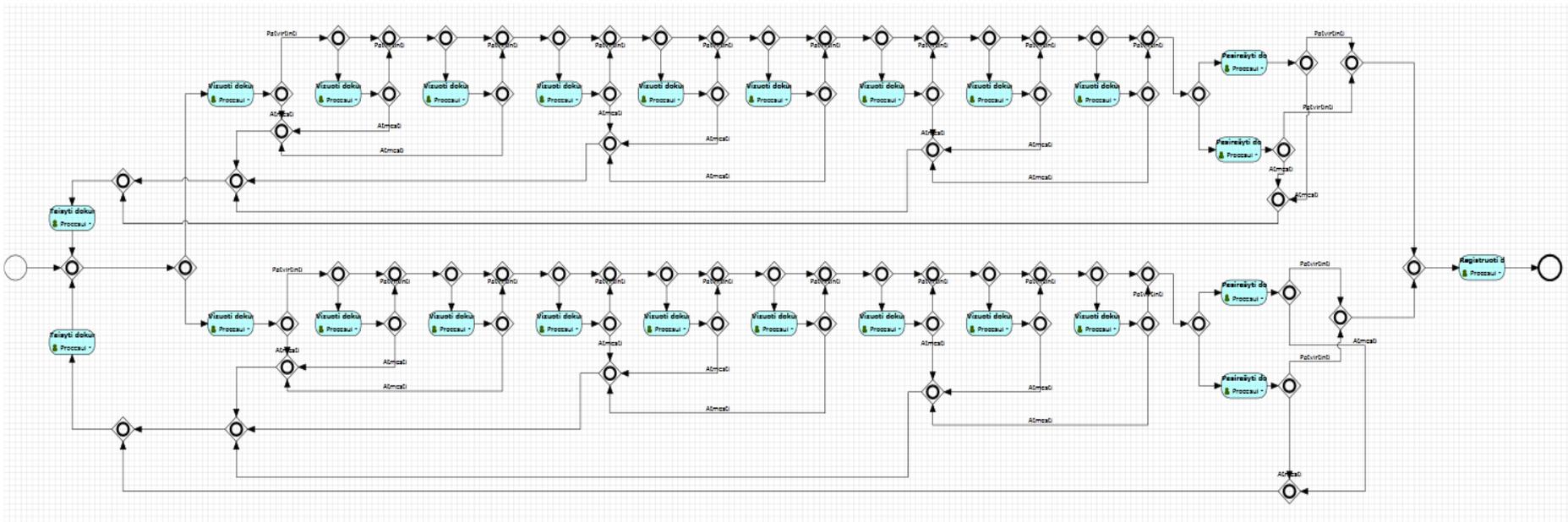
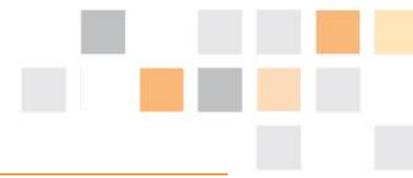
- **Tablets**

- *WEB access interface adopted to touch screen*

- **Smartphones native applications**

- *Android*
- *iOS (demo available)*







Thank you! www.doclogix.com

