

■ Product Overview

Open Text Extended Workflow

Automate, integrate, and analyze processes and systems

As business operations expand across geographies and lines of business, projects and corporate initiatives become more complex and critical, and it becomes increasingly difficult to integrate people, processes, and content. Analyzing and implementing streamlined processes is crucial for improving productivity, increasing operational efficiencies and cost savings, and reducing legal and compliance risks.

Task Name	Due Date	Priority	Status	From	Location
Conduct Mkt Research	None	Medium	Pending	Admin	Expense Task List
Document Review	None	Medium	OK	Admin	New Workflow Map
Expense Audit	None	Medium	Pending	Admin	Expense Task List
Expense Plan	None	Medium	Pending	Admin	Expense Task List
Invoice	None	Medium	OK	Admin	New Workflow Map
Risk Assessment	None	Medium	Pending	Admin	Expense Task List
Risk Report Review	None	Medium	OK	Admin	Monthly Report
Risk Documentation	None	Medium	OK	Admin	Monthly Report
Sales Documentation	None	Medium	OK	Admin	New Workflow Map
Sales Expenses	None	Medium	OK	Admin	Monthly Report
Task Local Work Breakdown	None	Medium	Pending	Admin	Expense Task List
Train Sales Team	None	Medium	Pending	Admin	Expense Task List
Verify Lab Results	None	Medium	Pending	Admin	Expense Task List

An integrated, sortable view of workflow assignments increases task visibility and helps knowledge workers prioritize

Core business processes involve passing tasks and related content from person to person, and are often governed by corporate policies and standards. These processes are the lifeblood of many organizations, and can include exchange of paper documents. As organizations grow, however, paper-based procedures that once worked smoothly become increasingly inefficient, and hamper productivity. Information previously stored in a single, universally accessible system spans multiple servers, platforms, and file formats. Finding the right content and understanding the processes for completing a task become frequent challenges.

Poor visibility of processes and content leads to difficulties tracking progress and curbing administrative overhead. Approvals are frequently delayed, extending project timelines and schedules unnecessarily. Inconsistent processes can also lead to significant legal and regulatory compliance risks.

Open Text Extended Workflow helps automate, analyze, and streamline traditional business processes, integrating them with mission-critical IT systems to significantly improve productivity, promote operational efficiency, and produce cost savings.

Increase efficiency and enhance accountability

In today's global enterprise, numerous business processes occur each day, from filling out a purchase order to assigning documents for review and approval. Open Text Extended Workflow helps you to define, apply, and reuse business logic to improve process efficiency. Business process owners can build and manage workflows with little or no dependence on IT resources. Comprehensive, easy-to-use tools encompass process-oriented collaboration, analysis and control, and system integration tools, all of which ensure that the appropriate levels of control, tracking, and approval are in place. With Extended Workflow, you can incorporate relevant resources—users and documents—into graphical workflows that mirror your operational processes.

Once initiated, a workflow automatically executes each step, assigning tasks to appointed or dynamically-determined participants. Extended Workflow analysis reports enable managers to quickly identify bottlenecks and monitor performance. All procedures can be standardized, leading to compliance with corporate policies, improved efficiencies, and higher levels of productivity. Extended Workflow also facilitates compliance with government records retention and electronic signature policies.

Electronic signatures can be applied to workflow steps and forms, providing managers and other content approvers with the capability to electronically sign off on business processes. With electronic signatures, a permanent signature page can be added to PDF documents and forms. This accelerates approval and facilitates document tracking, while reducing the paperwork and manual practices typically required. Extended Workflow's electronic signature functionality helps reduce exposure to the risk of audit, regulatory, and litigation issues, while ensuring and enhancing corporate accountability.

Affordable for widespread adoption

Open Text Extended Workflow combines a secure document repository, process automation tools, query and reporting tools, and information retrieval into one system, minimizing integration, administration, and licensing costs. Departmental owners and stakeholders are empowered to match processes to business needs in real-time, without day-to-day dependencies on IT resources. Experience increased user adoption with intuitive tools for both advanced and "consumer-level" users, seamless integration with workplace productivity tools, and accessibility via any standard Web browser.

Integrated exception handling and data validation automatically verify a user's submitted data, ensuring that valuable time is not spent confirming the accuracy of data. Once forms are automated, the work required to make updates is reduced. Efforts associated with manual processes are minimized.

Optimize corporate performance

With Open Text Extended Workflow, you can reduce the costs and complexity of developing and streamlining your business processes. With its integrated process automation system, Open Text Extended Workflow allows you to adapt and comply with new standards and rulings well within required timelines and budget costs.

Open Text Extended Workflow includes Open Text Business Intelligence, a software solution for transforming data into useful information for making business decisions. Open Text Business Intelligence enables rapid, flexible analysis of process efficiency, as well as other enterprise information. A scalable, end-user friendly (no coding required), advanced reporting solution, Business Intelligence allows advanced desktop and casual Web-based users to access and analyze enterprise workflow information stored in transactional databases, data warehouses, and data marts. With the models and reports included, end users can easily access complex layers of workflow metadata to format and share relevant information in reports. Power users can access query and reporting applications, while report consumers leverage query and reporting functionalities on the Web.

Extended Workflow's unparalleled automation, visibility, and control of all of your business processes enable you to realize significant benefits—reduced project cycles, streamlined efficiencies, enhanced accountability, and optimized corporate performance.

Minimize risk, enhance accountability

Open Text Extended Workflow minimizes exposure to the risks associated with audit, regulatory, and litigation issues by enabling everyone in your organization to file corporate holdings based on organizational policies.

Comply with government regulatory requirements for records retention, electronic signatures, paper elimination, and more. Extended Workflow gives your organization a reliable foundation for defining and adhering to corporate procedures, gathering the information necessary to evaluate risk, and monitoring the effectiveness of the internal control system.

Feature Summary

Increase information worker productivity	Automatically alert users when workflow tasks are assigned, or when processes become late. Drag and drop steps and assignees, attach documents and other objects, create sub-workflows, define conditional loop backs, set milestones, and specify details such as deliverables and due dates.
Audit user activity	Use comprehensive audit trail functionality to provide detailed document activities. Add signing events to workflows and forms, providing the authentication characteristics of paper-based processes to forms and practices.
Analyze and optimize process performance	Open Text Business Intelligence allows the enterprise to identify trends, discover opportunities, and streamline regulatory compliance reporting.
Enforce security policies	Monitor login statistics and enforce policies on session timeouts. Define the maximum number of unsuccessful log-ins that can be attempted in a specified timeframe.
Integrate with other IT systems	Remotely initiate workflow processes, and enable two-way communication and import/export with other applications and systems. Make routing decisions and synchronize data across multiple applications. Trigger and schedule automatic processes within workflows using XML data representation.



Benefits:

- Reduce paper-based processes to minimize costs
- Streamline processes and increase employee efficiency
- Optimize corporate performance with end-user friendly reporting
- Reduce risk by enforcing standard policies and procedures

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