

Smarter workflow with Workflow Portal for HPE Content Manager

Yes

Extend the power and reach of HPE Content Manager from desktops to mobile devices

Highlights

- Improve organisation collaboration with an easy to use common workflow interface
- Streamline commonly performed tasks within your organisation, helping to improve your users' productivity
- Reduce user errors with interfaces that are purpose built with logical form and function
- Simplify the tasks of day to day management with easy to navigate portal reporting and monitoring pages

Optus Navigator Suite Workflow Portal for HPE Content Manager (formerly HP TRIM software) is designed to help organisations more easily deploy complex workflow processes quickly and efficiently.

The Workflow Portal allows users to leverage the HPE Content Manager workflow engine in two important ways. Deliver the whole workflow experience through an intuitive Web Portal and extend the capabilities of HPE Content Manager Workflow with additional enterprise features.

The Workflow Portal delivers every day user and administrative tools such as In Trays, Shared Queues, Activity Forms, Management Screens and personalised Portal Pages through an intuitive web portal. The one interface supports end users' who focus on task completion and managers who need to keep an eye on workloads, task progress and reallocation of work.

Features

- **Automate tasks** using the extended server side command broker. This engine provides automated backend processing such as updating payroll systems, generating custom email messages or adjusting document security as the workflow process unfolds.

- **Simple electronic forms** help to improve user adoption to automated workflow processes within the portal, allowing you to define your own starter and task pages to streamline your processes.
- **Workflow portal** allows users to view the status of their workflow processes more quickly and easily and the associated activities within each workflow case.
- **Template management** allows you to incorporate your template documents currently used in HPE Content Manager into steps within the new workflow processes and ensure the right templates are always used.
- **Tailored back-end processing.** With broker agents incorporated into the Workflow Portal, you can define your own back-end tasks and connect these directly to the Workflow Services engine. Execute your own code developed using the HPE Content Manager Software Development Kit without altering the core application.
- **Mobility Extensions.** Extend the reach of workflow to smartphone users within and outside your company. Capture documents, complete workflow steps and more with the mobility extensions.

Simplified work trays and menu system

The screenshot shows the 'In Trays' section of the Workflow Portal. On the left, there is a sidebar with search and filter options. The main area displays a table of tasks categorized by 'My Items (3)', 'Team Items (3)', 'Suspended Items (0)', and 'Delegated Items (0)'. The table has columns for Status, Priority, Activity Due, Activity Name, Workflow Name, Action, and Acquire. Below the table is a 'Reassign Selected Items' button and a text input field.

| | Status | Priority | Activity Due | Activity Name | Workflow Name | Action | Acquire |
|--------------------------|-------------|-----------|----------------------|--|--|--------------|---------|
| <input type="checkbox"/> | In Progress | High | 26/09/16 04:59 PM | Pending - PTO Task allocation and drafting | (CC16/37) South bank corridor enhancement project [Job:16/134] | Acquire/Open | Acquire |
| <input type="checkbox"/> | In Progress | Very High | 07/10/16 04:59 PM | Pending - PTO Finalise the approved response | (CC16/41) white line update plan [Job:16/139] | Acquire/Open | Acquire |
| <input type="checkbox"/> | In Progress | Medium | 10/10/16 11:00 AM | Pending - PTO Task allocation and drafting | (CC16/46) Example for DTF [Job:16/159] | Acquire/Open | Acquire |

Intrays are split between personal, group and suspended tasks. Filter, sort and tag operations all improve a user's task management.

The workflow enquiry screen lets you see, at a glance, all work related to selected processes and see within each process the status of each step.

View your processes as a whole and generate reports directly from the Workflow Portal.

Configure workflows directly from the portal

The screenshot shows the 'Setup Workflow Activity Items' configuration screen. It features dropdown menus for 'Workflow Templates' (set to 'Briefing Response Request') and 'Workflow Activity' (set to 'Author Prepare Response'). Below these are tabs for 'Naming and Instructions', 'Activity Form', 'Form Settings-1', 'Form Settings-2', 'Notifications and Email', 'Date and Time', 'To Do Items', and 'Forward Nominations'. A text box explains that these settings control features in the 'DisplayActivity01' activity form. At the bottom, there is a 'Panels' section with several checkboxes for configuring the user interface.

Panels

- Show Create from Template Panel (Show as Default)
- Show Upload Document Panel (Show as Default)
- Show Add Reference Record Panel (Show as Default)
- Show Upload Document Panel on Front Page
- Where the user is registered against CommandVault, show the Vault control panel
- Show the Reminders control panel for this activity
- Show the 'Where Am I' panel. (This lets a user see where their step is within all steps in the workflow)
- Include the service steps in the Where Am I panel display
- Show the 'show workflow in Desktop TRIM' icon in the Workflow Details Panel.

Once you sketch the workflow process in HPE Content Manager the task of setting up tasks is simplified within the Workflow Portal.

Configure Instructions, Time Alerts, Email Alerts, To Do Items, Server tasks and many more features directly from the Workflow Portal.

Personalised task screens

The screenshot shows a task screen for 'Gold Coast Dredging' with the following elements:

- Navigation:** In-Tray, New Case, Documents, Enquiry, Reports, Reassign, Delegation, Admin, Dashboards.
- Workflow/ In-Tray:** (CC16/35) Gold Coast Dredging [Job:16/132]
- Actions:** Refresh, Save, Reassign & Exit, Suspend, Send FYI Email, Send Email Action, Change Due Date, Reminders, Close.
- Documents within this Workflow:** Initiating Document: CC16/35 Gold Coast Dredging.
- Completion:** Outcomes: Exit with no further action, Send for Approval. Notes: Send for approval.
- Additional comments related to this workflow:** A text input field for comments.

Select from the many task screens shipped with the Workflow Portal or build your own task screens.

Users are presented with logical screens that are designed to have only useful and appropriate options.

Enquire screens to manage multiple cases

The enquiry screen includes the following components:

- Search:** Search, Advanced Field Search.
- Filters:** Process Template, Workflow Title Filter, Workflow Name Filter, Workflow Job Number, Job Number Filter, Date filters (Date From, Date To), Workflow Created By, Text Filters.
- Table:**

| View | Job# | Workflow Name | Records | Status | Priority | Started | Due | Activities | Activities Owner(s) |
|------|--------|--|-------------------------|---------|----------|-------------------|-------------------|-------------|---------------------|
| + | 16/158 | (147) Sample document for one click edits [Job:16/158] | - 147 | Overdue | Medium | 03/10/16 02:21 PM | 06/10/16 02:21 PM | Activity 4 | Andrew Jenkins |
| + | 16/161 | (149) Checklist [Job:16/161] | - 149 | Overdue | Medium | 04/10/16 01:47 PM | 07/10/16 01:47 PM | Case Step 1 | Andrew Jenkins |
| + | 16/162 | This is a request for re-grading | - 157 - 158 - 159 | Overdue | Medium | 04/10/16 03:51 PM | 07/10/16 03:51 PM | Case Step 1 | Andrew Jenkins |
| + | 16/163 | High trail expansion | - 162 - 163 - 164 | Overdue | Medium | 04/10/16 04:14 PM | 07/10/16 04:14 PM | Case Step 1 | Andrew Jenkins |

The workflow enquiry screen let's you see, at a glance, all work related to selected processes and see within each process the status of each step. View your processes as a whole and generate reports directly from the Workflow Portal.

This application has been developed to operate on a range of Browser platforms where a touch interface is provided.



To discuss how Optus can help you through enterprise records management solutions contact your **Optus Account Manager** or call

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