

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 workflow items:

	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 includes dropdown menus for 'Workflow Templates' (set to 'Briefing Response Request') and 'Workflow Activity' (set to 'Author Prepare Response'). Below these are tabs for 'Form Settings-1', 'Form Settings-2', 'Notifications and Email', 'Date and Time', 'To Do Items', and 'Forward Nominations'. A section titled 'Panels' contains several checkboxes for configuring the user interface.

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

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

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	OverdueMedium	03/10/16 02:21 PM	06/10/16 02:21 PM	Activity 4	Andrew Jenkins
+	16/161	(149) Checklist [Job:16/161]	- 149	OverdueMedium	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	- 16/2 - 157 - 158 - 159	OverdueMedium	04/10/16 03:51 PM	07/10/16 03:51 PM	Case Step 1	Andrew Jenkins
+	16/163	High trail expansion	- 16/3 - 162 - 163 - 164	OverdueMedium	04/10/16 04:14 PM	07/10/16 04:14 PM	Case Step 1	Andrew Jenkins

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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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