WF Steps

Add Dynamic Functionality to Livelink® Workflows.

The standard Livelink Workflow User Steps do not always provide all the functionality necessary for automating a workflow process. Often steps must be completed manually because Livelink® does not provide the proper workflow dynamics. Syntergy provides new step types such as Forms Plus and Route for Review that fill the gaps in functionality. The ability to alter routes dynamically based on the user input from these steps is a key feature of Route for Review. Our most popular step is Forms Plus. Because it makes forms based input more intuitive it dramatically increases the usability and acceptance of Livelink® Workflow across an organization.

Send Information Between Workflows and Enterprise Workspaces.

A key requirement of workflow is the ability to build folder hierarchies in the Enterprise workspace and then populate them with information generated during the workflow process. Syntergy provides several steps including Follow Up, Archive Workflows and Create Folders to provide this functionality dynamically based on attributes captured during a workflow.

Key Features

- **Follow Up:** Workflow attachments are copied to an identified folder at this step in a workflow. This is popular because it allows you to automatically move attachments out of workflows instead of manually moving them. You can set date and times for the copy to occur.

- **Route for Review:** This workflow step forces the step performer to select who the step should be sent to for review. It allows you to select multiple people dynamically before sending the step on for review.

- **Discussion Step:** Create a Livelink® discussion at a certain point in the workflow process. Workflow managers can identify who participates in the discussion and who can shutdown a discussion. Once the discussion is shutdown it moves on to the next step.

- **Archive Workflow:** This saves all of your workflow information to a defined location at a specific point in the workflow. The workflow designer can choose the items to be saved including attachments, forms, attributes, and comments. Saving the information to the Enterprise allows non-workflow participants to see important content and it also allows workflows to be deleted without losing the associated data.

Benefits

Transfer Workflow Information to Enterprise Workspace

Often the information captured during the workflow needs to be moved to the Enterprise workspace. The ability to dynamically build folder structures based on attribute values and place information including form data, comments, attribute values role performers and attachments are key requirements. These features are key to providing audit data after workflows have been archived.
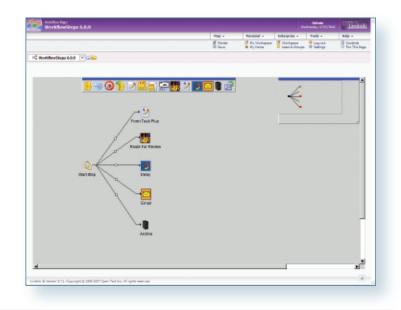
Easy to Use and Capture Extended Workflow Input

The Workflows Steps module makes Livelink® Workflow more useable and more dynamic. It reduces the number of steps that may require manual processing; like someone manually filling out a form, printing out or e-mailing a document and waiting for a response, thus saving time and money for the organization.

Specifications

Servers	Livelink® Version 9.x on UNIX® and Windows®
Databases	Oracle® SQL*Server®

Key Features Continued ...

■ **Create Folders:** Create folder hierarchical structures in the Enterprise Workspace based on attribute values entered during the workflow process.

■ **Router Step:** Allow users to dynamically assign performers for subsequent steps by filling in identified users fields in form steps. Assignments are reset on loop backs

■ **E-mail:** provides the ability to send an e-mail to one or more users determined dynamically when the step becomes ready. Customize the e-mail subject and message with system attributes, workflow attributes and form values.

■ **Forms Plus:** Enhance form views by allowing users to work with attachments, workflow attributes, comments and dispositions. Users can save form input without being forced to complete the step. Form designers can add the ability to submit dispositions. Forms can be dynamically assigned to multiple users and groups.

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