



FineFlow

Business Process Management

FineFlow is an extremely capable BPM (Business Process Management) Solution from the FineDocs ECM Product Suite and Solutions. It enables Organizations to completely map and automate their Work-Processes and lets Organizations handle frequent changes in the process with advanced, robust and a very agile solution. It helps in Intelligent Coordination of People, Tasks and Information.

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FineFlow is a comprehensive Business Process Management (BPM) Solution that helps Organizations and its Resources come together, analyze, collaborate and solve complex business situations. FineFlow enables Organizations to completely map and automate their Work-Processes. It helps in Intelligent Coordination of People, Tasks and Information; makes Work-Process more Efficient, Effective and Adoptable to Change.

FineFlow is a .Net based Workflow solution that offers comprehensive business process modeling and workflow automation capabilities along with full-fledged document management and business activity monitoring (BAM) functions. It also offers sophisticated Human Workflow Services including integration to standard communication tools and support for queues. It enables business users to design and deploy BPM workflow applications using software tools with which they are already familiar. FineFlow BPM engine with all the advanced features and functionalities of a true BPM Solution which spans Process Designer, Form Builder, Reporting-BAM & Analytics, Process Manager and so on.

Seamless integration with FineDocs ECM adds to its agility. FineFlow lets organizations handle frequent changes in the process with advanced, robust and a very agile solution. It lets stakeholders accommodate changes to existing business process without pain, within code-free environment and with the capabilities of advanced process-manager which allows changes on the fly.

Stakeholder! What is there for you ?

When your role is to make decisions you require correct and authentic information without losing time. ECM (Enterprise Content management) and BPM (Business Process Management) has not only become an infrastructure requirement today, but is a true-value investment for modern organizations.

Highlights

- Highly intuitive and User friendly, drag-n-drop based Web-Interface

- Powerful and easy to use graphical canvas called Process Designer makes it easy to collaborate on design of business processes
- Task Allocation using the Automatic, Manual or Combination methods
- Seamless integration of Business Rules with business process and objects improving operations and control with Processes and People
- Compelling reporting and dashboard capability enabling real-time visibility of business metrics
- Human Task supports human interaction with process flows to view data, review documents, manage exceptions and make business decisions faster
- Fully compatible with FineDocs Document Management System (DMS). Business users can view, approve, process and forward documents using the FineFlow Web interface and use FineDocs as a backend storage with full security enforcement
- Significantly reduced cost of high-volume complex manual processes and increased productivity with robust and agile automated process.

Features

FineFlow incorporates several features that improve performance and enhance usability. The main features in FineFlow and their highlights are:

- Process Modeler/Designer
- BAM Capabilities
- Queue
- Calendar
- Form Builder
- Work Item control/Workdesk
- Document Viewer
- Document Type
- Document Management Features

Administration

I. Process Modeler/Designer

The Process Modeler/Designer is a completely web based tool which is used to design workflows. It offers full drag and drop functionality for designing workflows. Actions can now be clicked to link, while property and other settings can be accessed quickly from the context menu. The property setting panel presents properties in groups based on similar functionality. It is browser-based requiring no plug-in or IDE. It provides a comprehensive set of standard activities, which can be easily dragged and dropped on a design mosaic and linked to design your processes. The Process Modeler/Designer has two areas:

- Staging Area - Where you can design and save the workflow process design files.
 - Production Area - Where you can deploy different versions of the currently open workflow design.
- The process design can be saved and deployed as different versions. Each version is identified by a unique version name. You can select any version from the list of available versions to deploy. By default FineFlow Engine always executes the latest version.

FineFlow Process Designer/Modeler is a complete web based canvas which is used to convert concept into powerful solutions, design workflows graphically and configure the workflow properties without writing a single line of code. It makes it easy to collaborate on design of business processes with comprehensive set of standard activities which can be easily dragged and dropped on a design mosaic and linked to design your processes.

- User-friendly intuitive drag and drop interface
- Helpful wizards to configure business activities and properties
- Reusable process modelers for sharing
- Escalation mechanisms to ensure no delay in tasks
- Queue management to help assign tasks to groups of users with similar roles; with support of Automatic/Manual allocation of tasks, Push-Pull pattern and Queue level escalation
- Process simulator to help in running the test scenarios
- Calendar control adds a great deal of flexibility managing resource availability

Support for BPM Notations

FineFlow has built-in support for Business Process Management Notations.

Property Setting Wizards

This feature guides users through the setting of resource selection properties and escalation properties for all the Resource Activities.

II. BAM Capabilities

The BAM Control is extensive reporting capability and true BAM functionality. It provides users with several out of the box reporting and activity monitoring views. In addition, it permits users to configure Data Points and KPIs for comprehensive business activity monitoring. It is one of the crucial controls in FineFlow.

III. Queue Control

Queue Control is another important feature provided in FineFlow. Queues help assign tasks to groups of users, which are formed on the basis of parameters like skill levels, roles etc. This feature allows FineFlow process administrators and owners to assign tasks to groups of actors and to include queues comprising participants as part of their process. It enables a greater level of flexibility in the assignment of tasks to the participants.

The FineFlow Queue Control has the following features:

- Supports Push-Pull patterns
- Role/ User can be specified as Participants
- Access rights for Role/ User
- Queue level escalations
- Automated/ Manual Allocation of tasks to actors

The task allocation can be done on the following basis:

- Automatic - where the allocation is done automatically using some algorithm. The assignment is done using the Round Robin, Random or Least Used methods.

- Manual - where the task allocation is done manually
- Combination - where the task allocation is done using a combination of automatic and manual methods.

In addition users can be allowed to view and pick a task from the queue. This is the "pull" pattern as opposed to the "push" pattern where the queue assigns tasks to participants at random. Alternatively, users can be allowed to view just a button to get the next task in the queue. In this case the users cannot view the tasks in the queue but they can click this button to get the next available task in the queue.

IV. Calendar

In the Calendar Control, you can have any number of top-level calendars. In addition, you can define a number of lower-level calendars that inherit from one of the top-level calendars. As a result, an organization with a number of geographical locations can define an organization-wide master calendar, which will broadly define the work hours across the organization. It can then allow each location to define a separate calendar with its own work hours to accommodate the unique work hour requirements of that region. This calendar will inherit the settings of the master calendar and the custom settings can be added on top of them. Additional levels of customized calendars can be configured in this manner by inheriting from the corresponding higher-level calendar. The lowest levels of calendars that can be defined by extending this process are the Resource calendars.

V. Form Builder

The Form Builder feature is used for generating customized web forms by the FineFlow process administrator. The Form Builder eliminates the requirement of a pre-defined web form providing a great degree of flexibility as the administrator can design the form at run time according to the workflow requirement. It provides a wizard to set fields and the layout of the customized web form for the respective workflow.

The FineFlow Form Builder has the following features:

- Run time/ Dynamic creation of a customized web form for a Workflow
- Define fields for capturing data from users for a workflow.
- Administrator can Decide what data to capture

- Data can be captured from a third party application
- Document attachment supported
- Facility to preview the web form
- Power to redefine fields of a workflow application

User

I. FineFlow Web Workdesk

FineFlow workdesk provides a virtual desk to the end users to access their work item list (Inbox). It provides comprehensive view of data as well as documents associated with a work item. The user in the workflow can view WorkItem assigned to him/her in a user-interface that is similar to Outlook. The Workitems are delivered to the Inbox, where users can click on each item to open a detailed view. The user name of the workflow user whose work item list is opened is displayed at the top right corner of the window.

II. Initiate Workflow

Form is filled up and Workflow is initiated in this module. User can attach Documents with the form. The documents can be directly imported from FineDocs Document Management system or attached from local user desktop. User can also scan the documents directly from FineFlow interface.

III. Forward/Send Back Workflow

Form can be viewed, filled up and Workflow is forwarded or sent back in this module. User can again attach Documents with the form. The documents can be directly imported from FineDocs Document Management system or attached from local user desktop. User can also scan the documents directly from FineFlow interface.

IV. Scanning

The purpose of this module is to customize work steps of document Scanning, data extraction and Archiving documents and hence integrate the scanning solution with the FineFlow system.

- Web Scanning in WorkItem initiation and Inbox custom doc Viewer
- Scan QC – Image Processing
 - Deskew
 - Despeckle
 - Border-Remove
 - Dot-Remove
 - Line-Remove
 - Rotation
 - Rescan / Replace – Page
 - Rescan / Replace – document
 - Append Scanned page in existing document
 - Delete Page
 - Delete Document
- View Mode – Fit, Stretch, Normal

V. Document Viewer

The document viewer has two parts: application data and document viewer. Application data appears in the Inbox of a user according to the rights assigned by the administrator for that user. The administrator can assign either View or Modify rights to the user according to the need of the application.

The document Viewer feature enables the end user to associate and view document images related to the Workitem in the workdesk. The document viewer supports image as well as electronic formats like exl, doc, pdf etc. Supports more than 150 file formats. The document viewer provides all the annotation features provided in the document management system.

VI. Document Type

This feature enables the Administrator to define the type of documents to be attached with the application. The Document types are used at the time of document attachment with the workflow for classification of content.

VII. Document Management Feature

FineFlow is fully integrated with document management system, providing all functional features of the document management system with advanced workflow operation. This integration provides a "Software solutions that manages and integrates business processes and enterprise content."

VIII. Search

Administration Search

The purpose of this search / retrieval module is to monitor the system and take action by the FineFlow administrator.

SEARCH CRITERIA is of following types:

1. WorkItem Search – Workflow

- Display all workflow in a drop-down list (A text box and a pick list can be there to pick up the workflow name in the text box, then wildcard search will be allowed)
- Select any Workflow or enter workflow name and click on search
- Display all WorkItem lists in grid format. Display workflow name, WorkItem name, Activity, initiated by, requested on, Status (completed, awaiting,...), with a hyperlink on the Status.
- Display details of each WorkItem i.e, Priority, Activity name, Queue, Activity type, Assigned to, Assigned On, Completed on, etc.
- Click on WorkItem to view the status in a graphical view and the (read-only) data and attached document in the Document Viewer

2. WorkItem Search - Status

- Display the status list in a drop-down list
- Select any status (complete, awaiting)

- Display results accordingly as above.

3. WorkItem Search - Initiator

- Display the user lists who are the initiators in the FineFlow system in a drop-down list
- Select user name.
- Display results accordingly as above.

4. WorkItem Search – Initiation Date

- Select the initiation date range, 2 text boxes followed by 2 calendars. OR
- Select Previous Days, 1 text box accept only numbers upto 999, OR
- Select Previous Months, 1 text box accept only numbers upto 999
- Display results accordingly as above.

5. WorkItem Search –Assigned To

- Display the user lists who are the actors in the selected workflow in a drop-down list
- Select user name.
- Display results accordingly as above.

6. WorkItem Search – WorkItem name

- Display the work item activity list (e.g. Approval, information, task etc.) associated with the selected workflow in a drop-down list.
- Select any work item or select All.
- Display results accordingly as above.

Note:

- Search Criteria can be any one (1 – 6) or any combination of the above.

RETRIEVAL - ADMINISTRATION

- Display all WorkItem lists in grid format. Display workflow name, WorkItem name, Activity, initiated by, requested on, Status (completed, awaiting,...), with a hyperlink on the Status.
- Display details of each WorkItem i.e, Priority, Activity name, Queue, Activity type, Assigned to, Assigned On, Completed on , etc.
- Click on WorkItem to view the status in a graphical view and the (read-only) data and attached document in the Document Viewer
- Sorting will be there in each field header.
- Administrator will be able to delete any WorkItem.

User Search

The purpose of this search / retrieval module is to view the status of Inbox items as well as all the initiated item by the user. User Search is having 2 features:

- View Inbox Status
- View Initiated WorkItem Status

SEARCH CRITERIA - INBOX

1. WorkItem Search – Workflow

- Display all workflow in a drop-down list (A text box and a pick list can be there to pick up the workflow name in the text box, then wildcard search will be allowed)
- Select any Workflow or enter workflow name
- Display all WorkItem lists in grid format. Display workflow name, WorkItem name, Activity, initiated by, requested on, Status (completed, awaiting,...), with a hyperlink on the Status.
- Display details of each WorkItem i.e, Priority, Activity name, Queue, Activity type, Assigned to, Assigned On, Completed on, etc.
- Click on WorkItem to view the status in a graphical view and the (read-only) data and attached document in the Document Viewer

2. WorkItem Search - Initiator

- Display the user lists who are the initiators in the FineFlow system in a drop-down list
- Select or enter user name.
- Display results accordingly as above.

3. WorkItem Search – Initiation Date

- Select the date range, 2 text boxes followed by 2 calendars. OR
- Select Previous Days, 1 text box accept only numbers up to 999, OR
- Select Previous Months, 1 text box accept only numbers up to 999
- Display results accordingly as above.

4. WorkItem Search - Status

- Display the status list in a drop-down list
- Select any status (complete, awaiting)
- Display results accordingly as above.

5. WorkItem Search – WorkItem

- Display the work item activity list (e.g. Approval, information, task etc.) associated with the selected workflow in a drop-down list.
- Select any work item or select All.
- Display results accordingly as above.

Note:

- Search Criteria can be any one (1 – 5) or any combination of the above.
- User will be able to view only those WorkItem on which he has privilege and he is associated with.

- Display all Inbox WorkItem lists for this user in grid format. Display WorkItem name, initiated by, From (Actor), Receive date, Doc Type (Attachments), Priority, Queue Status, Read, Unread, etc. with a hyperlink on WorkItem name.
- Click on WorkItem to view the status in a graphical view and the (read-only) data and attached document in the Document Viewer

IX. Archive

- Save into DMS – Allow administrator to copy the WorkItem subfolder under workflow folder of FineFlow cabinet to any other cabinet/folder.
- Save on Desktop – Export/Save extract data, WorkItem field data in a xml file and attached document in any location on web server.

Archive into DMS

- 1) In the FineFlow administration, give option for Archival.
- 2) In the Archival module, give two options: Archive into DMS, Archive on desktop.
- 3) In the Save into DMS, follow the following steps :
- 4) Source
 - Display all workflow in the drop-down list. Select a workflow.
 - Display all work items in a grid view
 - Select any work item.
- 5) Destination
 - Display all Cabinet/Folders/subfolders in a tree view. Select a cabinet/folder.
 - Click on Archive
 - The work item folder along with all field (folder-level descriptor) data will be copied into the selected folder.

Note: Archival can be treat as separate module, or it can be merged in Search/Retrieval. In the search module, the retrieved work items can be archived at any point of time.

Archive on Desktop

- 1) In the FineFlow administration, give option for Archival.
- 2) In the Archival module, give two options: Archive into DMS, Archive on Desktop.
- 3) Follow the following steps :
- 4) Source
 - Display all workflow in the drop-down list. Select a workflow.
 - Display all work items in a grid view
 - Select any work item.
- 5) Destination
 - Enter any path on web server.
 - Click on Archive.
 - A new folder will be created in the selected path with the workflow name and a subfolder will be created with the work item name.
 - All attached document will be copied to this path.
 - All field data (folder-level descriptors) will be exported in an xml file in the format of field name and value.

Note: Archival can be treat as separate module, or it can be merged in Search/Retrieval. In the search module, the retrieved work items can be archived at any point of time.



Acyutah Technologies Pvt. Ltd.

Suite 07, H-15, Sector-63, Noida-201301 INDIA
Ph.:0120 – 4916205
www.acyutah.com | www.finedocs.com