

# Work XChange

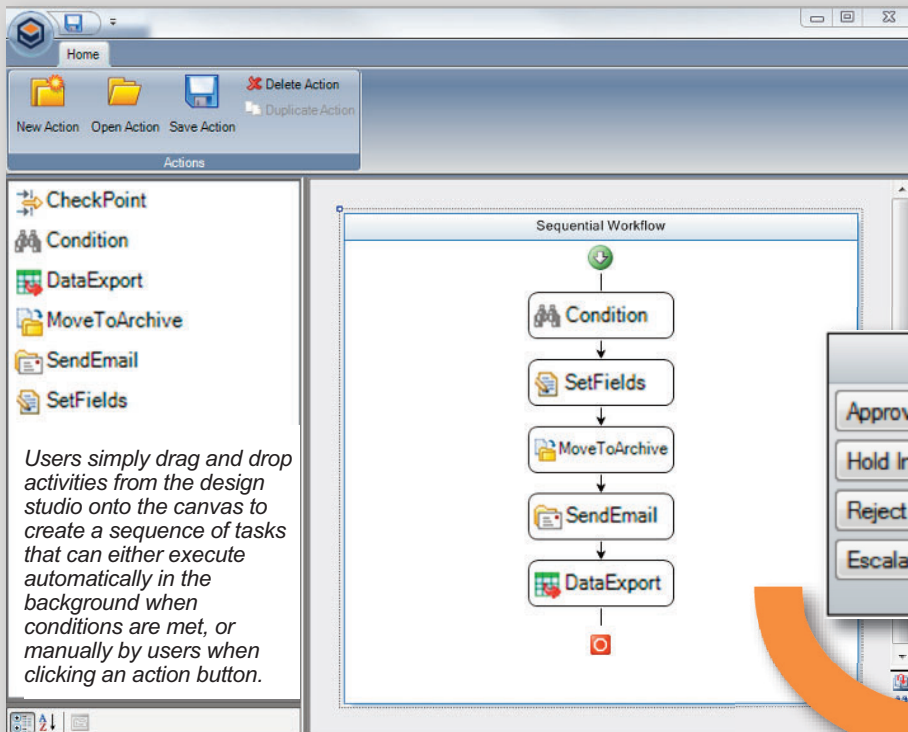
## Document Workflow Automation Studio

Work XChange is the powerful document workflow extension to the SmartSearch document and content management solution. Used to increase productivity, Work XChange can automate many common manual tasks such as assigning documents for approval and sending reminder notifications. Best of all, the workflow actions are completely customizable for each department or business process using it. Accounts payable may require two levels of approval for invoices while contracts require three. Using the drag and drop designer, these rules can easily be built into the system and SmartSearch security will control who has access to them.

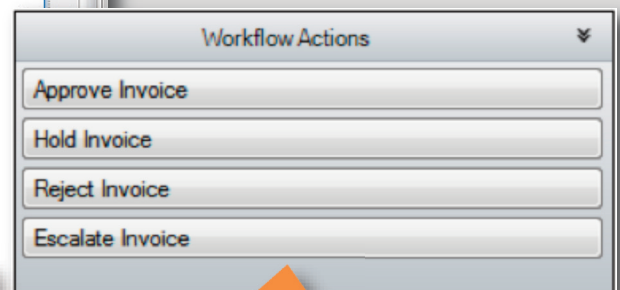
As document based processes are often the life blood of many businesses, the level of automation Work XChange can provide always equates to decreased costs, increased productivity and significant return on investment.

### Key Features

- Simplified document workflow administration
- Drag and drop designer
- Both user initiated and automated processes
- Direct email intergration with SMTP
- Date math routing
- Exception reporting
- Conditional routing and notifications
- Multi-level approval processes
- Automated data export
- Document queuing and matching



Manual task buttons are presented to users in the document viewer, or in the SmartSearch results grid. Button names and their actions can be fully tailored to the needs of each business process. Actions can also be executed via the GlobalSearch web client or the SmartSearch app on iPad and Android mobile devices.



FEATURE	BENEFIT
<b>Drag and Drop GUI</b>	Workflow actions are created by dragging activities including conditions, moving, field value setting, emails and data exports onto the design canvas and setting their appropriate values. Even the most novice of users can learn to design workflows very quickly.
<b>Manually Initiated Actions</b>	Actions that require user intervention can be set as such during workflow design, enforcing that users perform their review and approval duties as required. The built in audit trail will log all actions taken manually by users so there are no discrepancies.
<b>Automated Actions</b>	Workflow actions can be set to automatically trigger when a condition is met in SmartSearch. All new invoices over a certain dollar amount can be routed to different individuals for approval or documents meeting their disposition date can be staged for destruction automatically with no user intervention, freeing up time normally spent on oversight for other tasks. The built in audit log will track any automated actions taken on documents so there are no discrepancies.
<b>Date Math Routing</b>	Use formulas that calculate between the current system date and a document date to execute date based escalations or document dispositions for records management.
<b>Checkpoint Matching</b>	Use a special condition called a checkpoint to automatically check for the existence of matching documents. This is useful for three way match automation, for invoice approval or mortgage application processing.
<b>Multi-Level Processing with Escalations</b>	Use escalation logic or other advanced conditions to route documents through multiple levels of review or approval. If documents sit in any one level for an extended period of time, Work XChange can send a notification and/or push them along to the next step automatically.
<b>Data Export</b>	Once documents have completed their workflow, the data record can be exported to XML or CSV for entry into other business applications. Time normally spent manually keying payroll data or invoice information is eliminated and employee time can be repurposed for more value added tasks

### Common Applications

**Accounts Payable Invoice Approval** – Eliminate the “Nike Network” for manually distributing and escalating invoices for approval and take advantage of early payment discounts and eliminate late fees.

**Employee Onboarding** – Ensure that all new hires are completing all of the necessary documents in your onboarding packets. Work XChange can help drive regulatory compliance by matching the necessary paperwork such as applications, I9’s and W4’s and providing automatic management escalation whenever any are missing.

**Contract Management** – Before you sign on the bottom line, make sure documents have gone through the proper review channels. Coupled with revision control, you can track, review and approve changes.

**Document Retention Scheduling** – Set the retention requirements for documents based on your records policies and once disposition dates are met, Work XChange will stage them for destruction and notify the administrator that they can be purged.