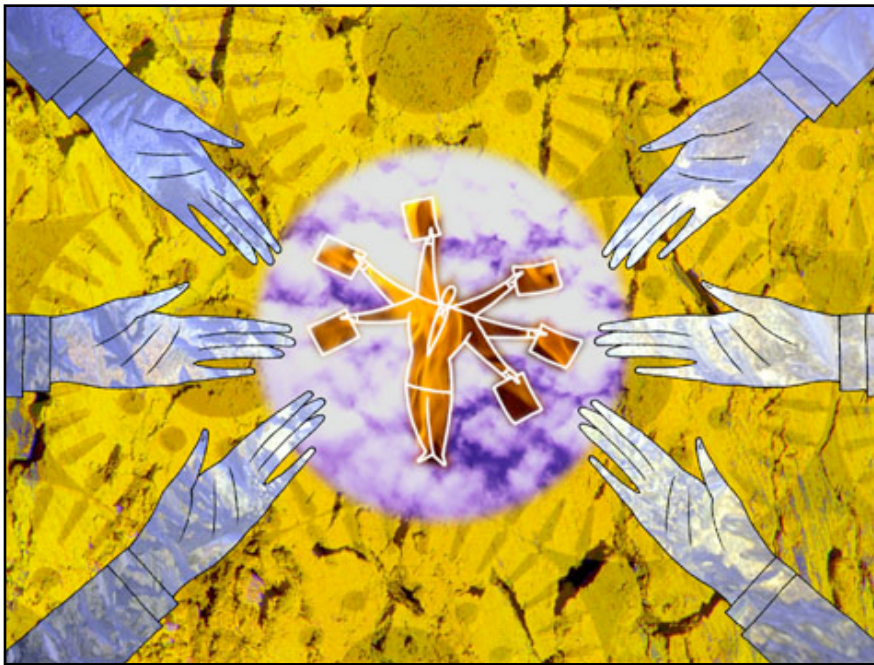


Rheinner Research Note

iDatix Progression™

Workflow software for the rest of us



For many years, the electronic document management industry has referred to workflow software as a separate and optional component to document and content management software. There is something about the term itself that conjures up visions of complexity, never ending rule definitions, and long naval-pondering meetings with no resolution on rules, routes and roles.

Subject to a variety of interpretations, “workflow” can mean anything from the steps in a work process to Business Process Automation (BPA). iDatix simply defines Progression as the management layer for the iSynergy document management software suite, thus directly coupling documents with the business process to which the documents are related.

Progression™ at a Glance

Progression is designed for total business automation that allows for the development of workflow routines without the necessary involvement of, or requiring the intervention by, an IT resource.

Business managers can use Progression to design business automation processes in a very easy and intuitive way.

While Progression can be used as a business automation tool in general, its primary purpose is to automate the business processes related to the iSynergy EDM suite.

Progression is in fact a management system for the documents and content warehoused inside the iSynergy suite.

Progression allows users to define roles and processes and relate them to specific documents and sets of documents being kept in the various iSynergy “filing cabinets.”

ABOUT RHEINNER RESEARCH NOTES:



Rheinner Research Notes are easy to understand and short overviews of key document and content management software and hardware products. For over 22 years the Rheinner Group has studied the document and content management marketplace and its associated products and services, providing education, research and guidance on the adoption and use of document and content management technologies. This research note, and additional guidance, research and education can be found at www.techinfocenter.com.

A variety of controls and settings allow various tiers of users to develop, control and manage the rules that are applied to various documents and business processes in what is arguably the best and most logical user interface we have ever seen.

While Progression is sold as a software module, its function is to allow businesses to use it in order to automate the document process *without* requiring the involvement of IT staff or the use of programmers. Given the ease of use, Finance managers, Human Resource managers, and just about any line of business management, can all easily learn to use progression to shape the document management capabilities according to the business process they typically manage.

Business automation is what iDatix does, and the Progression software product is a product that lets you do that like nothing we've seen before.

HOW IT WORKS:

Progression is simple enough for almost any computer user to design, manage and develop an automation system. The graphical user interface is simple, elegant, logical, and easy to understand.

Progression Studio, the software that allows you to design the business process, provides the user (manager) with the ability to relate documents to processes using a menu selection called "Documents & Binders." By selecting the documents the user can organize multiple documents into a binder that can then be placed under the control of a process. So, for example, the documents related to a new hire can be put into a "binder" and then that binder can be placed under the control of the "New hire process," designed in Progression Studio. All subsequent documents will follow a similar convention and will automatically be grouped and processed according to the work process that was designed. It sounds complicated in words, but is

breathhtakingly simple to do using the progression studio.

The "process designer" is a graphical tool complete with graphical menu bar that allows you to design a process, lets say "new hire" from start to finish. The first step in the process design is called the entry point.

While the entry point could be connected to a set of documents, it could just as easily be connected to an email, web kiosk or any other data point used to initiate a business process.

The task editor allows the user to quickly and simply create actions and instructions to create the tasks necessary to complete the process. Defined "Actions" such as "complete" or "missing" can be created, which then become buttons on the user interface screen and can be used to determine the next step for a particular document or set of documents. The task editor also allows you to assign tasks to people, provide notifications, and present the status of items to certain users. One of the nicest and most powerful features is the ability to provide the user with instructions on what needs to be done at each task, or what the action wants them to do. This kind of built-in support eliminates a great deal of training, commonly associated with these kinds of systems. The fact that all of these things can be changed on the fly, means that the user interface can be constantly improved and operations can be simplified for them without taking the whole management system down to redo a set of tasks, or make changes.

A separate reporting function accessible from the managers tab in Progression, instantly shows bottlenecks, unfinished tasks, and monitors and tracks the length of time each task is taking. This allows the manager, at a glance, to see where the slowdown is and what particular process is causing it. The ability to amend and change tasks, assignments and actions allows the manager to have an immediate impact on improving the work process. This level of flexibility is not commonly found in document management

solutions.

CONCLUSION

iDatix Progression, and indeed the entire iSynergy Suite, is a third generation document management and business process automation solution. First generation solutions were, for lack of a better word, expensive document imaging systems, featuring very high storage capacity, limited client features, and ran on big iron. Second generation solutions were systems that could basically do the same thing on a PC LAN, at a lower cost and with significantly greater user features, but were burdened by a complex pricing structure and an overly complex modular architecture. That architecture often involves a great deal of customization and the installation of additional software modules that are not really necessary, but are required because of the way that features and functionality is packaged. Features and capabilities of second generation solutions are in large part engineering driven, and in other parts customer driven. This makes the feature set of the second generation product fairly extensive, but also random, inconsistent, difficult to operate, and it comes with a steep learning curve.

Third generation solutions are entirely standards based, and heavily coupled to Microsoft and its state of the art development facilities.

The features and capabilities of third generation solutions are highly customer driven, consistent in operability, simple to implement, and generally require minimal training. There is no question that the iSynergy Suite is, for all intents a purposes, a poster child for this revolution in electronic document management.

-Raimund Wasner