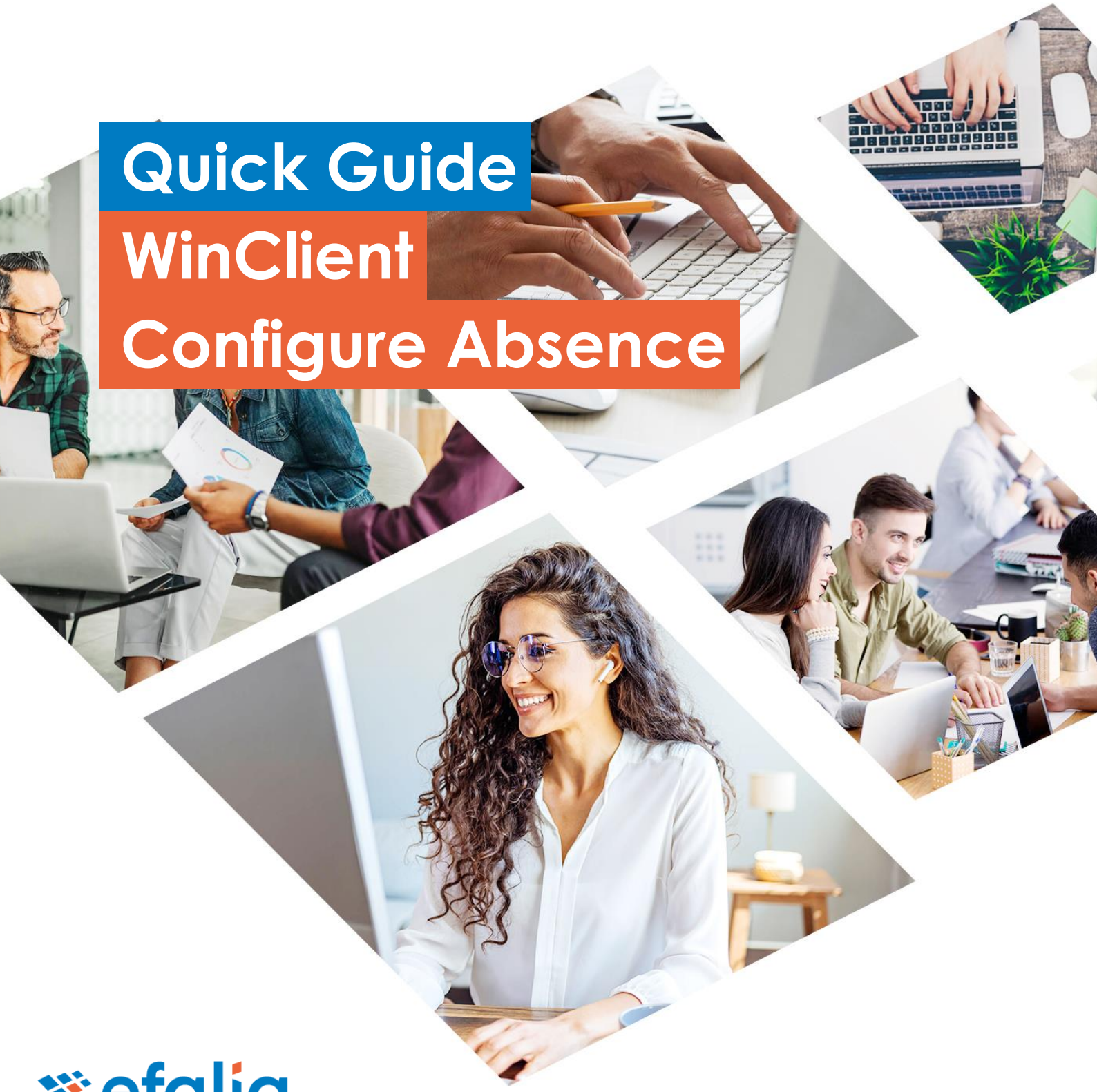
efalia ecm

Version 4.5

Quick Guide
WinClient
Configure Absence



efalia
smart content suite on a human scale

Obere Kaiserswerther Straße 17, 47249 Duisburg, Germany
T: +49 203 60 888 0 / info.de@efalia.com

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Efalia GmbH
Obere Kaiserswerther Str. 17
D-47249 Duisburg
Germany

Email: info.de@efalia.com
Web: www.efalia.com

UK and Eire

Efalia Ltd
Becket House
1 Lambeth Palace Road
London, SE1 7EU
United Kingdom

Email: info.uk@efalia.com
Web: www.efalia.com

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Business Process Management

Efalia ECM documents can be integrated into workflow processes using the process management option. With this module the path of a document through the steps of a defined process can be configured and then performed.

A process consists of several steps that are performed consecutively. Each process step can be individually configured to be worked on or whether an action is to be performed by one or more users. Defined tasks are specified for each user, for example approve, reject, comment or simply view (confirm notice).

If the task specified is carried out, the document is routed to the next step of the process depending on the structure of the process. BusinessProcessManagement controls the path of a document through the process steps and keeps track of the status and location of a document.

Configure Absence



When using the process management, the documents are sent to users for processing. The user will see the document in their Inbox. When a user is away they can specify a period for an appointed assistant. The appointed assistant needs sufficient rights to edit the document and to deputize for the user adequately.

The settings can be applied by selecting ***Extras*** ⇨ ***Absence Settings***. This can also be done by an Efalia ECM administrator in Enterprise Manager.

Example

Only one representative is set.

User 1 sets only ***User 2*** as representative.

User 2 does not have an active absence setting.

The documents are forwarded to ***User 2***.



Example

Only one representative is set.

User 1 sets as representative only ***User 2*** and ***User 2*** has an absence set.

The documents are not forwarded.



Example

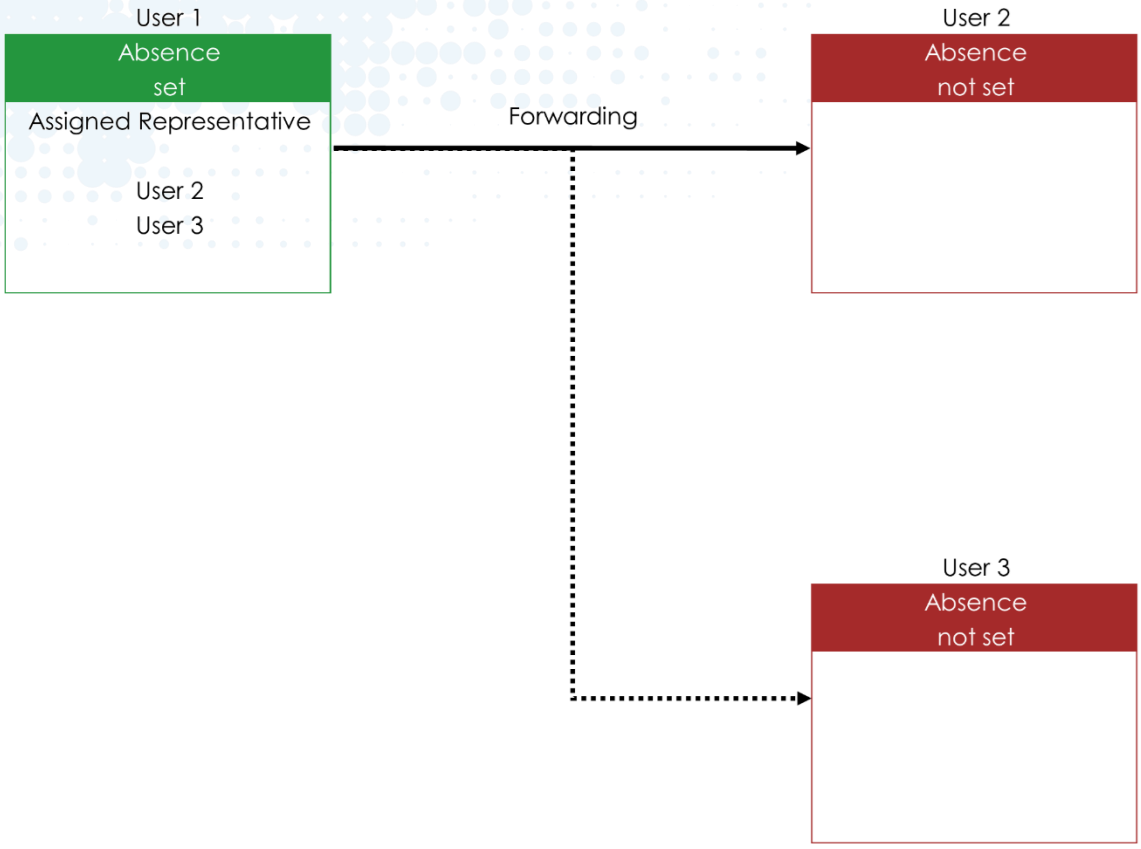
Several representatives are set.

User 1 sets ***User 2*** and ***User 3*** as representative during his absence.

Neither ***User 2*** nor ***User 3*** have activated the absence setting.

The documents are forwarded only to the first user in the list without active absence settings.

In this example, the document will only be forwarded to ***User 2***.



Example

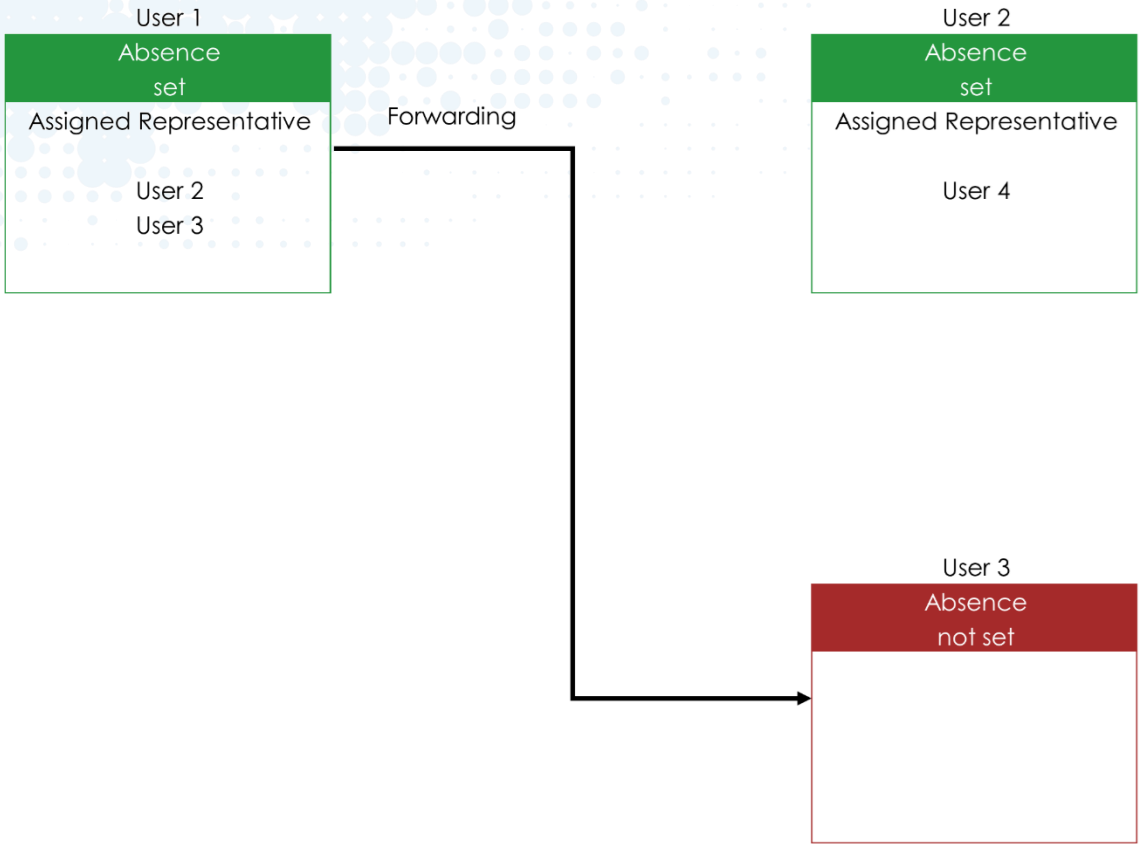
Several representatives are set.

User 1 sets ***User 2*** and ***User 3*** as representatives during his absence.

User 2 has also an activated absence but ***User 3*** has not activated the absence setting.

The documents are forwarded only to the first user in the list without an active absence setting.

In this example, the document will only be forwarded to ***User 3***.



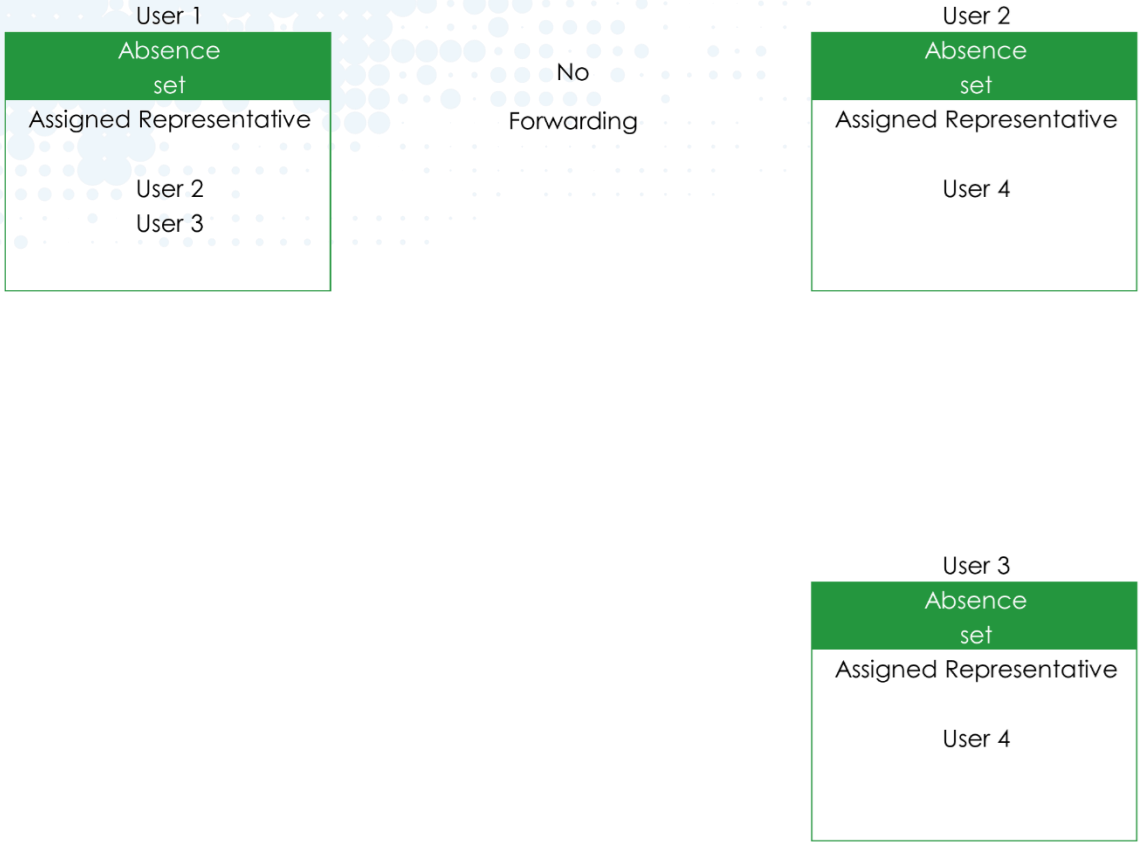
Example

Several representatives are set.

User 1 sets ***User 2*** and ***User 3*** as appointed assistants during his absence.

User 2 and ***User 3*** have also an activated absence.

The documents are not forwarded.


User 1
Absence set
Assigned Representative
User 2
User 3
No Forwarding
User 2
Absence set
Assigned Representative
User 4
User 3
Absence set
Assigned Representative
User 4