FileDirector
ELECTRONIC CONTENT MANAGEMENT

WinClient – Configure Absence
Quick Guide

Spielberg
POWERED BY EFALIA

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Table of Contents

Business Process Management 7
Configure Absence 7

Business Process Management

FileDirector 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 a FileDirector administrator in EnterpriseManager.

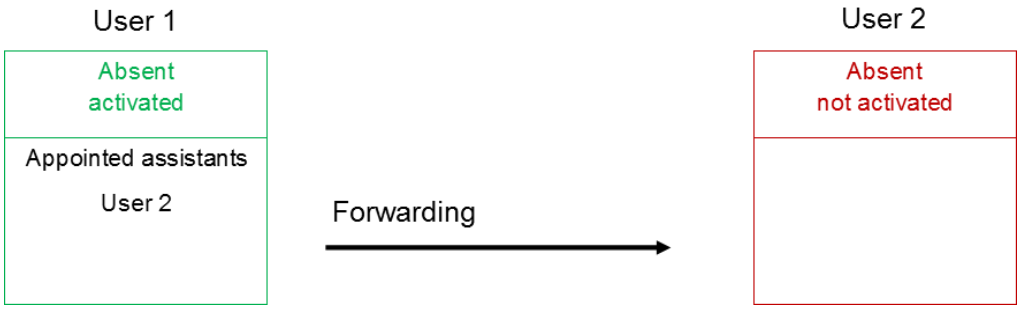
WinClient – Configure Absence

Example 1:

Only one appointed assistant is set.

User 1 sets as appointed assistant only user 2 and user 2 does not have an absence set.

The documents are forwarded to user 2.

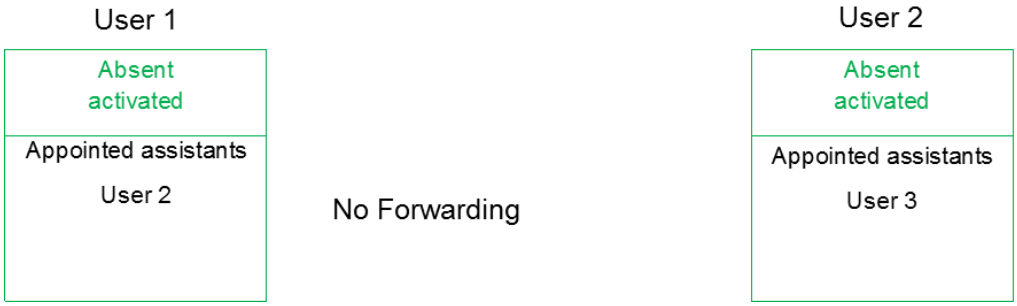


Example 2:

Only one appointed assistant is set.

User 1 sets as appointed assistant only user 2 and user 2 has an absence set.

The documents are not forwarded.

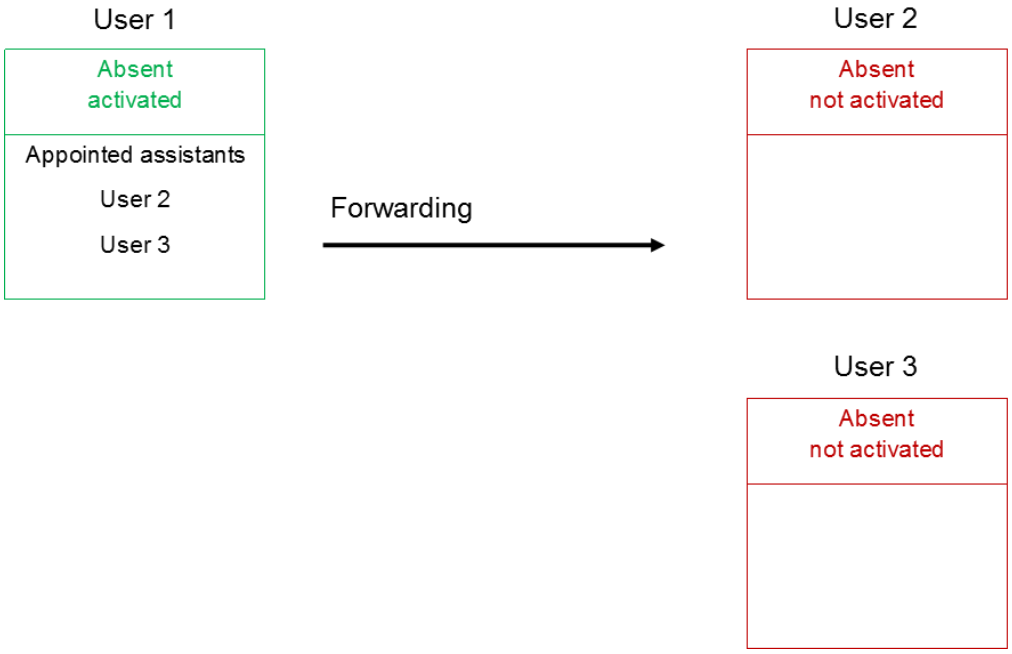


Example 3:

Several appointed assistants are set.

User 1 sets, as appointed assistants during his absence, user 2 and user 3. Neither user 2 nor user 3 have activated the absence setting.

The documents are forwarded only to the first user in the list.

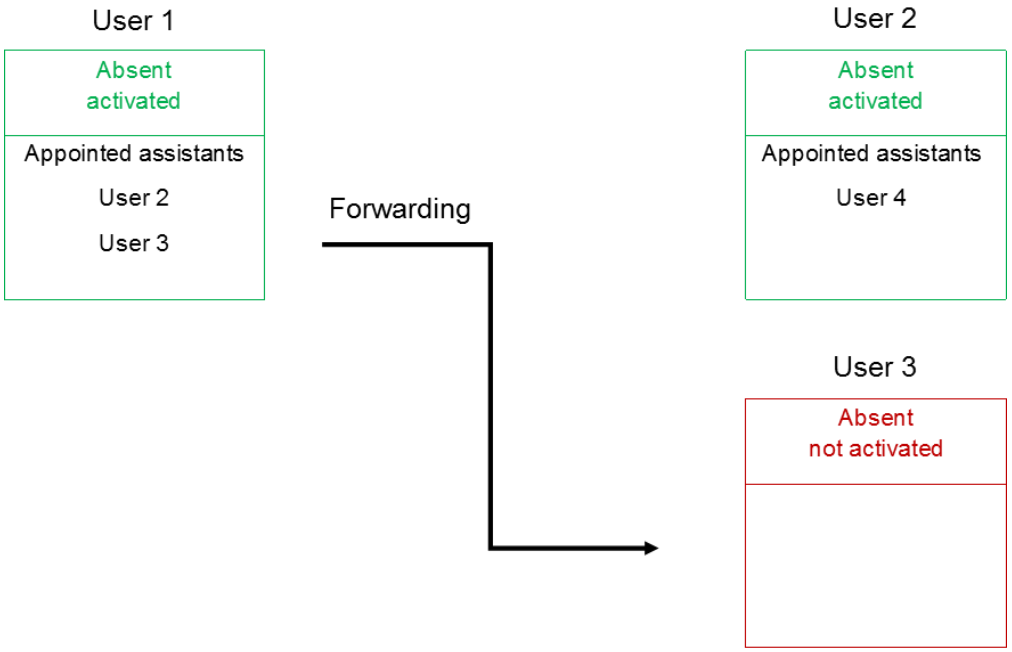


Example 4:

Several appointed assistants are set.

User 1 sets, as appointed assistants during his absence, user 2 and user 3. 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 activated absence setting.



Example 5:

Several appointed assistants are set.

User 1 sets, as appointed assistants during his absence, user 2 and user 3. User 2 and user 3 have also an activated absence.

The documents are not forwarded.

