

## What's New in Release 7.2

Improving business processes, fostering improved collaboration and finding easier ways to ensure information is handled in compliance are challenges organizations of all sizes deal with on a daily basis. Unlike other file management solutions out there, Xythos' Enterprise Document Manager (EDM) Release 7.2 delivers these tools in an easy to use web 2.0 environment. With a robust set of out of the box capabilities to enforce compliance, improve collaboration, automate business processes, and simplify document capture and imaging, your organization will see increased productivity at both the individual and organizational level. Built to deliver results quickly, Xythos EDM is more powerful yet easier to use than ever before.

## Automate with Xythos Workflow™

### Xythos Enterprise Document Manager Release 7.2

enables knowledge workers to increase productivity and automate business processes with more out of the box workflow capabilities. Advanced workflow task search enables users to track and manage workflow processes more easily. Enhancements ensure that the workflow owner can provide clearer instruction and communication to participants throughout the process.

### Managing security during a workflow

**On-demand permissions** for workflow tasks avoid exposing content earlier in a workflow process than necessary. With this new feature users automatically are granted read access to files when their piece of the workflow is ready to occur.

Task	Assigned to	Associated with	Workflow Name	ID	Status	Initiator	Start Date
Mandatory Approval	Cathy Chu	GG Currents 090308.xls	SF Currents Publication 2	W146864	Late	Steve Young	2/22/10 2:21:51 PM PST
Mandatory Approval	Cathy Chu	Findings 2.doc	SF Currents Publication 2	W135648	Late	Steve Young	11/2/09 3:11:10 PM PST

**Relative Date Search.** Advanced workflow task search enables users to track and manage workflow processes more easily.



For example, users cannot view or access files that have not yet been approved during earlier steps in the workflow. This is critical to many business processes where content should not be exposed prior to approval because of compliance or internal governance reasons.

**Manage permissions activity** provides the workflow owner with fine grain management of permissions as a step in a workflow to ensure secure handling and management of documents. The **new lock - unlock feature** also allows a user to control access to a document at various points of the workflow further aiding document security and compliance.

## Classification workflow activities

Easily classify and add metadata on documents in the workflow with the new **Classification Workflow Activities**. This important new capability supports many use cases such as document capture workflow activities or document publication processes. Classification and metadata entry can be either built into a workflow template or done as a user task providing flexibility for the workflow owners.

## Better visibility and communication for workflow

Let users know when their participation is needed in a workflow or even how the workflow is progressing with customized **Send Email Activities** feature. Include the file name, URL and other options, directly from within the email message. Custom email messages can be created for tailored notification during a workflow process to keep users more engaged in and informed of critical processes. The expanded Participant Instruction field allows workflow owner to provide more clear instructions to workflow users, enhancing communication and reducing confusion.

Improved **Workflow Search** and the new **Task Search** feature help business process owners and workflow participants keep track of workflows and tasks they are managing to avoid unnecessary delays.

The screenshot shows a dialog box titled "Set a Classification Property". It contains the following information: "Relevant File: 2008-04-22 XYZ PO (1).pdf", "Due Date: 3/14/10", "Classified as: Purchase Order", "PO Number: 23653", "Customer: XYZ Inc", "Account Rep: John Smith", and "PO Status: Open". At the bottom, there are three buttons: "Cancel", "Reassign", and "OK".

*Classification Workflow Activities capability supports many use cases such as document capture workflow activities or document publication processes.*

The screenshot shows a "Send Email Notification" configuration dialog. It includes a "Collect parameters from initiator" checkbox, an "Instructions for Initiator" field, and sections for "Sender", "Recipients", "Subject", and "Body". The "Sender" section has radio buttons for "System Default (demo@xythos.com)", "Template Owner", "Workflow Initiator", and "User". The "Recipients" section has checkboxes for "Template Owner", "Workflow Initiator", and "All past participants", with a "Find User" button. The "Subject" field contains "SF Currents Research Project has New Published Research!". The "Body" field contains a sample email message: "I am proud to announce that new research has been published to the SF Currents Research Project! The new file [File/Folder Name] was added by [Workflow Initiator]. You can view the file at [File/Folder URL]."

*Include the file name, URL and other options, directly from within the email message with the **Send Email Activities** feature.*

## Collaborating and Finding Content More Efficiently

### Find and identify images more quickly

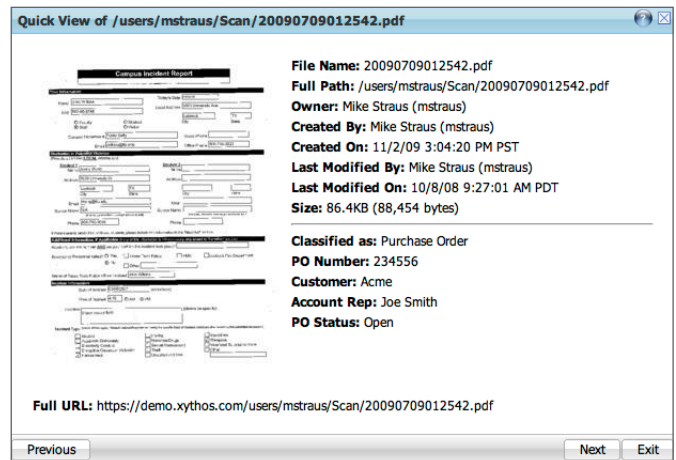
Now, you can quickly identify images with the **Thumbnail View** directly from the EDM Web view. This new feature presents thumbnails for image formats like .tiff, .jpeg, .gif and others. Thumbnails can be resized and the view option can be saved as a default view for the user or for the folder. **Quick View** goes even further, allowing the user to preview the first page of a document or image alongside its metadata eliminating the need to download and open a file to view its content.

### Search improvements

Make finding relevant content quicker and easier than ever before with the **Enhanced Quick Search**. This new feature reduces the need to use advanced search for Tags or customized to search specific properties for your needs. Create more powerful saved searches using relative dates. For example, users can search for files created in the last six days, weeks, months or years.

### Easier to access Lock and Checkout

With EDM 7.2, Lock and Checkout options are no longer buried in the Manage pages, providing quick and easy access to these important collaborative features. Simply use the right-click on the Web 2.0 interface or use the toolbar to lock and checkout documents. Built-in intelligence provides the appropriate option for each file.



**Enhanced Quick Search.** *Quick View allows the user to preview the first page of a document or image alongside its metadata eliminating the need to download and open a file to view its content.*

## Improved Document Capture and Imaging Support

With this release Xythos is taking its largest stride forward in the area of document capture and imaging support. The new workflow capabilities introduced in 7.2 were built to support document capture processes, such as the File Transformation Activity which supports conversion of images or OCR by plugging in third party tools. Both the Thumbnail and Quick View features make it faster and easier to view and identify scanned images without downloading the entire file. In addition, Xythos has added a new Web Services framework to simplify integration with other document capture technologies. Xythos Professional Services can be engaged for creation of custom web services and deploying document capture APIs.

For more information on benefits of Xythos EDM 7.2 to your organization and upgrade planning with Blackboard Xythos Professional Services, please contact your Xythos Sales Representative today.