


A SIMPLE AND EFFICIENT DOCUMENT MANAGEMENT SYSTEM SOFTWARE TO OPTIMISE YOUR PROCESS WORKFLOWS



KYOCERA Workflow Manager is a simple yet powerful software solution for document and enterprise content management. It is a ready-to-use solution for management of relevant disciplines within everyday business. The software product combines four inter-connected (or interlinked) modules for the following business areas:

- > Human resources – (HR)
- > Contract management (CM)
- > Sales & Distribution (SD)
- > Procurement management (PM)

These four modules can operate as stand-alone solution packages. However, when all the modules of the KYOCERA Workflow Manager are installed within an organisation it brings together all the business units to create a common information platform for efficient information, document and business process management. Kyocera Workflow Manager features ready-to-use processes and structures and an intuitive user interface. Finding cross-departmental information is fundamentally simplified, ensuring ease of usability.

The effort for installation and setup work is very low. The solution enables capture, storage and retrieval of documents and optimises processes involving document workflows and sharing. Predefined, department-specific modules make the workflows easy to automate and enable co-operative workflows among different departments. It also has full text search and integration with windows explorer and web browsers.

MODULES

KYOCERA Workflow Manager combines the options offered by the Sales & Distribution module, Contract management module, HR module, and Procurement management module. In terms of content, each module stands for a relevant work area of a company: sales & consulting, contract management, human resources, supplier management and can also be used as a DMS / ECM solution for each business function independently.

BENEFITS OF KYOCERA WORKFLOW MANAGER

- > Hierarchical, clear and predefined structures
- > Centralised view of all elements of a business process
- > Controllable access rights
- > Access regardless of location, as well as simultaneously by multiple users
- > Information viewed is always current
- > Faster and more reliable access to archived documents
- > Seamless process documentation (changes to file content can be logged)
- > Archiving in accordance with audit requirements
- > Process control through ad-hoc workflows (floating file)
- > Extensive search options
- > Entering of Office documents and notes directly in the e-file
- > Integration of e-mails as well as Internet or Intranet sites in the file
- > Option of using document templates
- > Quick installation and setup of a functioning overall system (in less than three hours)
- > Especially suitable for small to medium-sized installations

SD MODULE

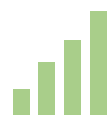
SD module provides digital management of customer-related data and documents. The module structures all business-relevant information and also provides a secure and centralised filing and administration location. The focus of the module is the technical and organisational requirements of sales work.

At its core, SD module consists of two components: digital customer and project files. The module is easy to handle and contains clear structures, whilst presenting data within a project in different views to meet the diverse needs of employees and departments. Masks that are tailored to the needs of sales and consulting are used for this purpose.

SD MODULE OFFERS VARIOUS VIEWS:

- > Representations that list all customers or projects of which complaints have been lodged
- > Various search masks
- > Consolidated views of appointments and contact information

In combination with the CM module, it is easy to achieve effective and structured management of customer contracts. When grouped with the PM module, the SD module can link customer projects with supplier orders. All orders for a customer project can be listed, and the question regarding the project for which an order has been triggered can be directly answered from the customer file. The orders are managed using PM module.



**SD SALES
& DISTRIBUTION**

PM MODULE

The PM module centralises and structures supplier and order management of a company and provides electronic support for all technical core processes. Information about suppliers and related orders can be consolidated into electronic supplier files using the Business Modules.

Upon creation of a new supplier file and when each new order is created, the PM module automatically generates a custom subfolder for managing all relevant information. Each supplier file has a file cover specially indexed for the respective supplier containing information such as the company name or the contact person.

The PM module offers various views or representations that list all the orders of a supplier and consolidated views that displays supplier open orders and orders of which complaints have been lodged.

In addition to the order number or order date, every order can be assigned to four criteria used to clearly describe the order status such as: Paid, Supplied, Done, Complaint. Ready-made lists indicate which deliveries are open or have deliveries of which complaints have been lodged. Orders can thus be processed and tracked accordingly. An order's current status can be resolved unambiguously at a glance.

In combination with the CM module, it is easy to achieve effective and structured management of supplier contracts. In combination with the SD module, the solution can be expanded into an accounts receivable and accounts payable management feature. Each order can optionally be indexed with a project number. This expansion makes it possible to link specific project numbers with a supplier order. This leads to direct relationships between the objects of both modules.



PM PROCUREMENT



CM CONTRACT MANAGEMENT

CM MODULE

The CM module is the module for central digital contract management. Each contract is provided with a specified, ready-made tab for systematic management of all relevant information. Documents, information and other attachments are organised into digital contract files and are easy to locate with each contract file having an indexed file or contract cover.

The CM module supports a variety of scenarios for transferring contracts. Paper documents are scanned at an individual workstation directly "into the contract file" or the central inbox. Information that is already digital can be linked directly to the desired file using the familiar drag-and-drop method. E-mail content and attached files are also archived. This results in a seamless contract history with complete correspondence.

This module allocates contracts to digital contract files ensuring documents within the contract file are automatically versioned, including the actual contract documents. Changes to documents always result in a new version and all modifications are seamlessly traceable. Archiving is in accordance with audit requirements.

Every contract allows definition of a termination date as well as an extension deadline. You can use these to configure individual reminders. As an example, contract extensions and the necessary steps can be initiated at an early point in time. Upon reaching the respective deadline or configured reminder date, the user automatically receives a notification through the interface. The CM module includes an overview of all managed contracts.

In combination with other modules, this module serves as a direct functional expansion. It seamlessly complements the specialised SD module, HR module, and PM module by means of a powerful contract management.

HR MODULE

The HR module organises all required personnel documents in one system. You can perform all the essential HR tasks using this module. The module provides all relevant technical structures for simple and effective employee management – whether retirement plans, travel expense reports, contracts or training certificates. All data and documents are made available to the HR staff at the press of a button.

The master data sheet of an employee contains all the relevant fields for personnel management, from address and contact data to career grouping within the company and critical invoice data (account information, etc.). Structured document and information processing HR module enables centralised bundling of all necessary personnel documents, manages all information in accordance with audit requirements and provides workflows as ready-to-use processes. A floating file can be started or documents can be set for resubmission intuitively per mouse-click. The systematic and clear structures within the HR module not only makes effective personnel management possible, but also reduces administrative effort and expense.

PREDEFINED RIGHTS AND ROLES

All the modules have a rights concept based on preconfigured roles including:

- Specialist administrator
- Supervisor
- User (employee)

All information in the context of the corresponding module is assigned to special object classes, with information access exclusively granted to authorised persons. Relevant attributes; such as customer, project, or employee numbers; are already created as attributes.

For all areas within KYOCERA Workflow Manager, there are ready-made lists of document types available. In this way, documents can be classified as available document types in the context of the SD module, such as: order delivery note and invoice; while document types such as certificate and certificate of attendance are available in the area of HR management. This enables both effective management of various documents and highly effective search operations.

Effective Appointment and Contact Management

The modules SD module, PM module, and CM module also offer consolidated appointment and contact representation on the global calendar; this is provided by the Mini Module Calendar.

LOCALISATION

KYOCERA Workflow Manager supports both language and specialised localisation.

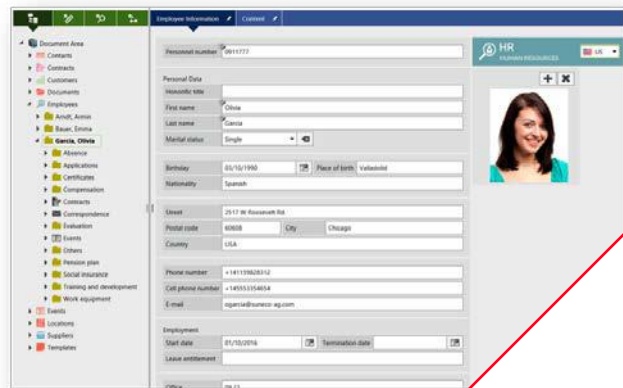
1. Language localisation

Language localisation enables the display of the same screen content in different languages. This allows users who speak different languages to work on the same tasks.

2. Specialised Localisation

Specialised localisation allows editing of the same content in a country-specific manner. KYOCERA Workflow Manager can thus take into account special technical and cultural features of individual countries. This allows users to edit the same topics according to the country. All users work with the same software on the same central database. Country-specific installations are not required and problems with data distributed according to the specific country are ruled out.

KYOCERA Workflow Manager implements specialised localisation through a list of available specialised localisations. In this list, the user can choose which specialised localisation is applied for the current object (e.g. the current employee in HR). Depending on the selected specialised localisation, KYOCERA Workflow Manager will display the associated country-specific mask. In addition to the country-specific masks, there is also a generic mask. This mask is always available, and is subject area-neutral.



WORKFLOWS

Simple, ad-hoc workflows can be created to enable the steps of a work process. As standard functionality, the KYOCERA Workflow Manager user has the floating file. It allows the user to create ad-hoc workflows themselves. The terms control slip and floating file describe a process that is user-defined and can thus be defined immediately. For this, the user defines a process through the user interface, which they can then start immediately. The intuitive user interface allows separate definition of the floating file e.g. via drag-and-drop, or flexible modules, which allow the user to define tasks for coworkers just like approvals and reviews.

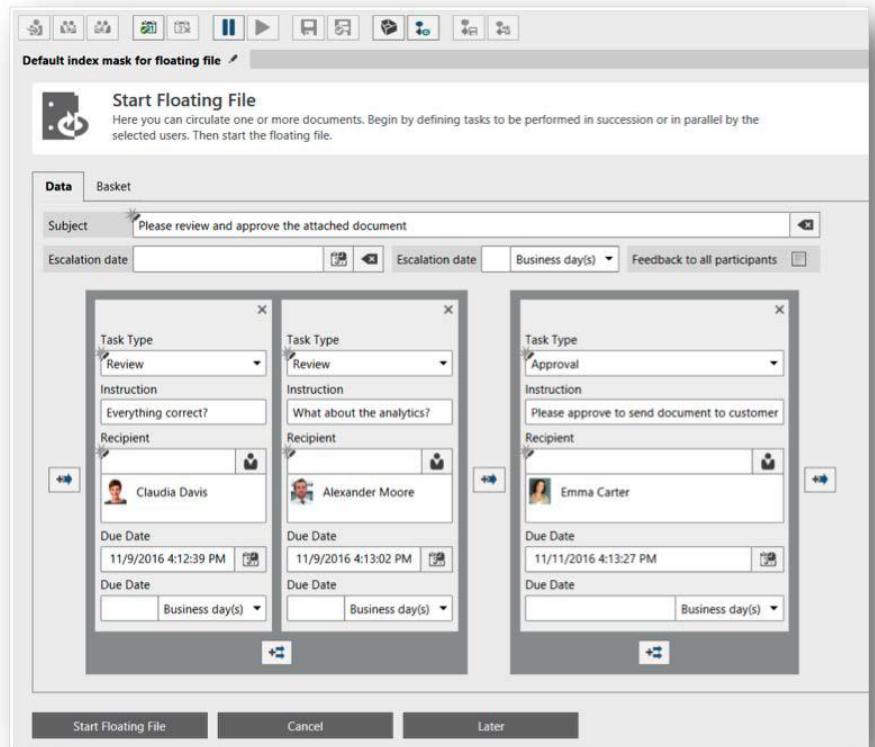
Sequences can thus be individually grouped and “packaged” in parallel or successively. As an additional module, custom workflows can be setup, which can also be combined with external systems. In addition, e-mail notification can be set up as a further additional module.

- **SAVE WORKFLOWS**

The user can save the workflows they have created in their personal favorites. This makes every day work easier. As soon as the process has been saved as a favorite, it can be opened in the predefined form again and again. This allows the process to be started, for example, with a new document by using drag- and-drop.

- **PUBLISH WORKFLOWS**

Workflows such as, for example, a floating file can be published to make it available to other users.



Requirements

The KYOCERA Workflow Manager server components are released for the following operating systems:

- Microsoft Windows Server 2008 R2 (64-bit)
- Microsoft Windows Server 2012 R2 (64-bit)

The KYOCERA Workflow Manager client components are released for the following operating systems:

- Microsoft Windows 7 (32/64-bit)
- Microsoft Windows 8.1 (64-bit)
- Microsoft Windows 10 (64-bit)

Installing the client components requires .NET Framework 4.5.2 or later. The released operating systems may run on the following virtualization platforms:

- VMware vSphere (Hypervisor) as of version 4.1
- Citrix XenServer as of version 5.6

System Prerequisites

The KYOCERA Workflow Manager client user interface as well as the KYOCERA Workflow Manager Server components are based on Microsoft Windows. The specific operating system releases can be found in the KYOCERA Workflow Manager Release Notes. Installation and setup of a functioning overall system requires less than three hours.

- 8 GB RAM main memory
- 5 GB space on the system partition for installation of the Kyocera Workflow Manager server components
- Operating system according to the Release Notes for Kyocera Workflow Manager



KYOCERA Document Solutions Europe B.V.

Bloemlaan 4, 2132 NP Hoofddorp, The Netherlands

Tel: +31(0)20-654-0000, Fax: +31(0)20-653-1256

Email: info@deu.kyocera.com