DocuWare

Task Manager

ProductInfo

See All Tasks at a Glance

DocuWare Task Manager speeds up day-to-day office work. With lists and email notifications, no task gets left behind and project move forward on schedule.

There are always going to be projects coming your way, big and small. Whether it's an invoice approval, checking on a case file, or preparing the set of construction drawings for your manager, you need a way to smoothly handle it all so that work doesn't pile up or cause a project to stop. Slowdowns can be costly. DocuWare Task Manager helps you, your department and your comapny keep on track.

Benefits

- **Secure:** tasks such as approving invoices do not inadvertently remain unfinished
- **Saves time:** using a task list you no longer need to waste time searching or asking questions
- **Convenient:** you are automatically informed by email when new tasks are pending

Application

Twin-Pack: Task List and Email Notification

With DocuWare Task Manager you can use two DocuWare features, namely the lists and the email notification. DocuWare complies pending tasks into a list. All you need to do is open DocuWare Client, click on Lists and complete the task which then disappears from your list. In turn, the email notification automatically lets you know when a document has arrived for you. The email also includes a link to the document in question.

Lists Explained

Here is an example of how a list makes office work easier: an invoice is received by a company. The mail room scans the invoice into the DocuWare file cabinet. The document is then automatically entered into the task list of the employee responsible. When they open their DocuWare Client they will immediately see the invoice that needs to be approved. The list is updated automatically when a new task is added. This is based on an automatic search with predefined index criteria. For example, if the search dialog contains the term "Incoming invoices" in the "Document type" field and the "Status" field is set to "new", then the employee's list displays all new incoming invoices. If this person approves the invoice with a virtual stamp, the index word changes in the "Status" field. The invoice is automatically removed from this person's list and placed in the list of the person next in the workflow. Payment can be made promptly so the company can benefit if you are taking advantage of early payment discounts
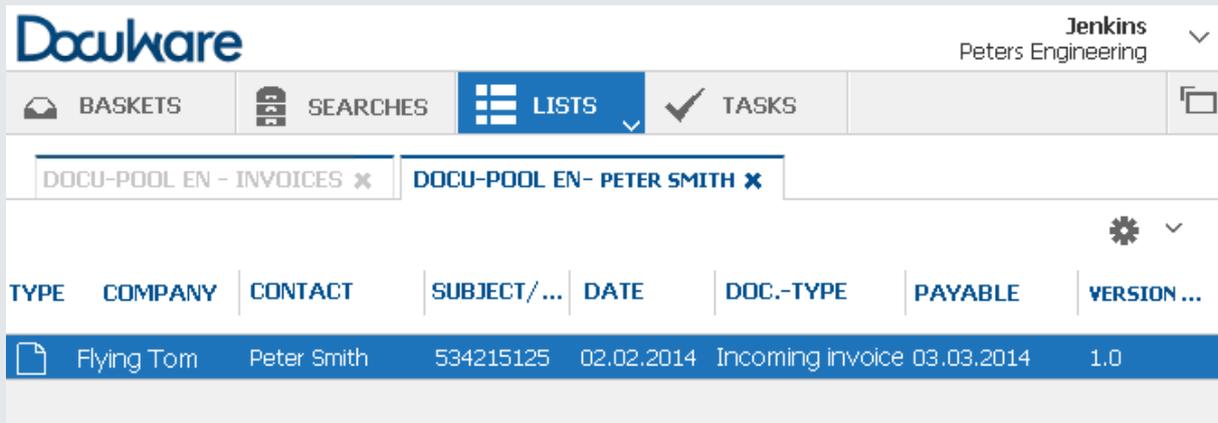
Know-how: DocuWare Task Manager

Task Manager is a license that enables two features in DocuWare, namely the DocuWare lists and the email notification. For you to be able to use the email notification feature on your system, the Notification Server must be installed and configured. You also need a configured SMTP connection to transfer data.

How to Use the Email Notification

The email notification feature is just as useful as the list: DocuWare automatically sends an email when an event is received for a document stored in the file cabinet or when the index changes. Here is an example to illustrate what this means: The Purchasing department orders office furniture for Administration. As soon as the delivery is received the Purchasing Director automatically receives an email with a link to the archived delivery note, i.e. he is informed that the delivery has been received. He can also open the delivery note in the DocuWare Viewer and compare it with the order before the furniture is distributed around the departments.
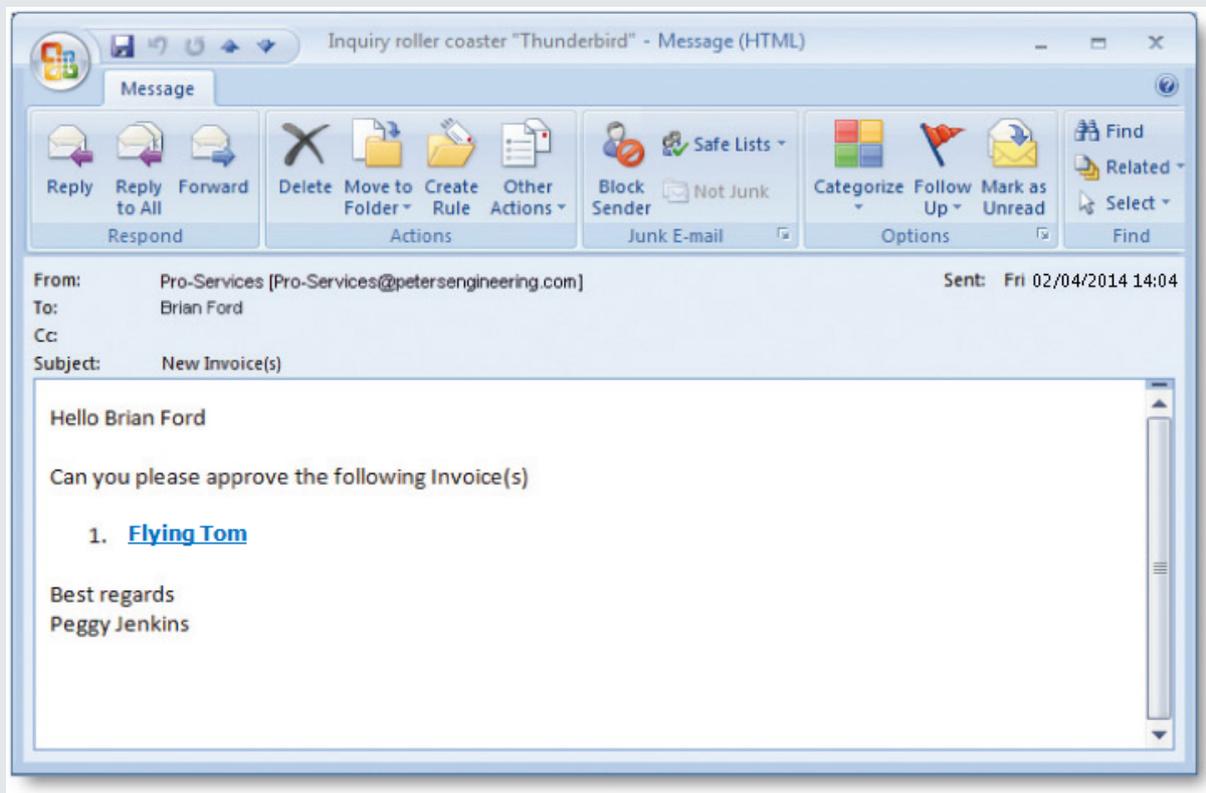
Work takes care of itself

Transparency: DocuWare Client lists pending tasks

Email Notification lets you know you have an invoice to approve.

NAVIGATION ∧

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TOOLS ∧

DISPLAY ∧
65%

STAMPS ∨

ANNOTATIONS ∧

OVERVIEW ∧

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2/4/2014, 9:20 AM
To be approved

Comments and/or special Instructions

Customer No.	Project No.	Order No.	Order Date	Delivery Date	Invoice No.	Date of Invoice
100347	DE2005011	393112	01/03/2014	02/01/2014	393112/I1	02/03/2014

ID	Article	Quantity	Unit Price (US$)	Discount	Amount(US$)
8	Double Corkscrew (Inverted)	1	1.260.000,00	0,00%	1.260.000,00
2	Cobra Roll (Inverted)	2	690.000,00	0,00%	1.380.000,00
24	Roll Over (Inverted)	2	450.000,00	0,00%	900.000,00
27	Zero-G Roll (Inverted)	1	610.000,00	0,00%	610.000,00
10	Double In-Line Twist (Inverted)	1	1.100.000,00	0,00%	1.100.000,00
43	Plain Track at Ground Level per m (Inverted)	100	17.000,00	0,00%	1.700.000,00
41	Higher Level Construction Unit per m hight & m track	2530	1.500,00	0,00%	3.795.000,00
46	Construction per day and technician	96	1.200,00	0,00%	115.200,00
47	Construciton per day and assistant	360	500,00	0,00%	180.000,00
48	TÜV	1	2.500,00	0,00%	2.500,00

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Instant access: one click on the link in the email notification and the document opens in the Viewer.

Useful Tips

Along with invoices and delivery notes, all sorts of documents can be shown in a list. The only condition is that the documents must be stored in the file cabinet. This also applies to the email notification, which only references documents in the file cabinet. How to use lists and email notifications in your daily work:

- Fast access: for those who like to keep things simple, the link to the list can be saved in the browser or to the desktop. You would just have to click the link to open it in DocuWare.

- Tasks by email: lists and email notifications can be combined: DocuWare then e-mails a link to the list as soon as a new task is pending.

- Scheduling: you can create as many email notifications as you want in DocuWare. If you don't want to be bombarded with new tasks every minute, set the email notifications to be submitted once a day or during a certain period. Links to all pending documents will then be included in just one email.

- Always up to speed: you can also be notified when a task has not been completed. This means, for example, that the cost center manager can find out immediately when an invoice has not been approved. He can intervene before the workflow slows down.

- Email notification as subscription: specify which employees should be automatically notified if, for example, the construction drawing for the new machine changes. Employees can also subscribe to receive released email notifications.

DocuWare

This document can also be found here:

http://pub.docuware.com/en/task-manager

For more information please visit our website at

www.docuware.com