



DATASHEET

Leading Military Workflow Solutions with Three Applications Ready to Sail

Reduce Processing Time by Up to 70 Percent

THE PROBLEM

Across the military, there are many processes that are vertical stove pipe systems or use paper-based methods for submitting, approving and distributing military forms. The stove pipe solutions lack flexibility to meet the mission and they burden IT—already an overloaded group—with yet another unrelated application to administer.

Paper-based processes are difficult to complete and route through the organization in a timely and efficient manner. Personnel fill out an awards form, print it and then route the hard copy along with a floppy disk through the chop chain for approval. With a large routing list, packages may wait for weeks until approving officials return from leave. This slow and manual process opens up the possibility that forms and their associated documents can be lost, that someone might change information on the form but no one else knew what or why, or that forms might simply be forgotten under a pile of paper on someone's desk. On top of these problems, how can anyone accurately track where the applications are within the process?

THE SOLUTION

Unlike stove pipe applications or paper-based processes, Captaris® Workflow provides a process design and execution environment that allows all processes to be tailored to the specific organizational requirements to complete the mission. Captaris Workflow is based on the latest Microsoft .NET service environment, so it easily communicates with and provides process workflow services to a scalable enterprise architecture. This includes out-of-the-box integration with Microsoft SharePoint, Exchange and Office 2003. With Captaris Workflow, any standard process can be automated in a matter of weeks.

In the next section, three process automation solutions powered by Captaris Workflow will be detailed. Each solution can be setup in days and can further be configured to meet the exact requirements of any unit. Please note that the following solutions are freely available at no charge to military customers who already own Captaris Workflow.

US NAVY MEDAL AND AWARDS PROCESS

The Medal and Awards Process is one of the most common processes in the Navy. Identifying those who have done their jobs and done them well contributes to promotions and impacts sailor morale and encourages them to stay in the Navy.

Using Captaris Workflow, the Medal and Awards process was deployed as an online, automated application that is flexible enough to be configured to the exact business rules and process of *any* military organization. Figure 1 shows the workflow model and key process steps. This includes setting up deadlines, overdue events, email notifications, etc.

Figure 1. The Medal and Awards process workflow model

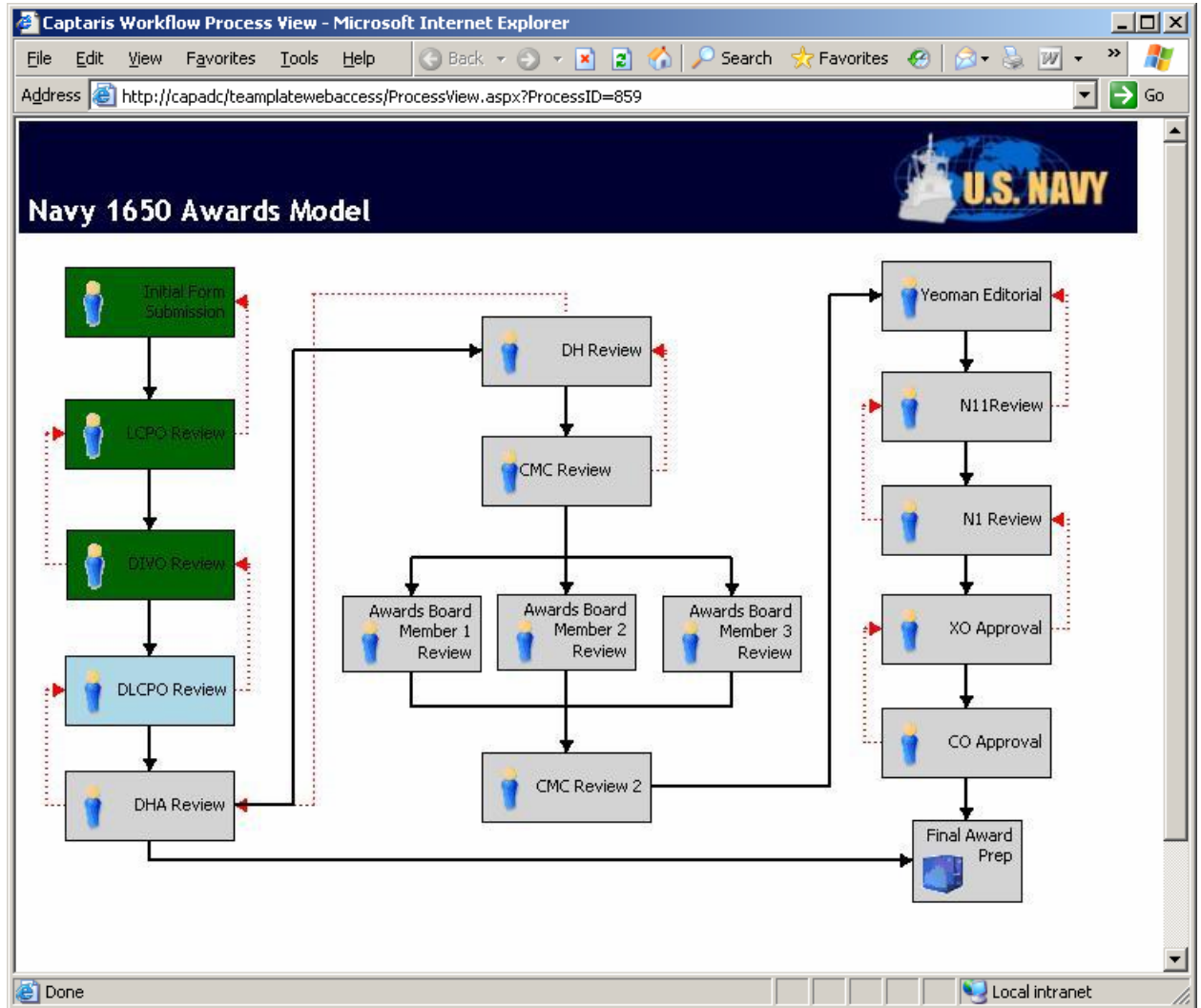


Figure 2. Users fill-out a Web-based version of the medal and awards process.

Navy Awards Form 1650 - Microsoft Internet Explorer

DIVO REVIEW PANEL		PERSONAL AWARD RECOMMENDATION FOR OFFICIAL USE ONLY			
COMMENTS:		1. SUBMITTER		1A. UIC/RUC	2. AWARDING AUTHORITY
		FROM: Dan Heflin		00950	TO: Sheldon Mackeranko
		ADDRESS: Herndon, VA			ADDRESS: Pearl Harbor, HI
		3. COMMAND POC		4. PHONE	5. EXP DATE OF ACTIVE DUTY: 5/2/2009
CHOOSE AN APPROPRIATE DLCPD TO RECEIVE THIS FORM NEXT: HEFLIN, Dan		NAME: Kevin Hanley (DSN)			SA. IF RETIREMENT/SEPARATION, NUMBER OF YEARS:
		EMAIL: administrator@capa.local (COM)			
Forward Rework Save Changes		6. SSN: 123-456-7890		7. DESIG/NEC/MOS	8. DETACHMENT OR CEREMONY DATE (EARLIER DATE):
PREVIEW 1650 FORM PREVIEW AWARD SHOW/HIDE TASK SUMMARY		9. LAST NAME: Johnson FIRST NAME: Mark		10. <input type="checkbox"/> RETIREMENT <input type="checkbox"/> TRANSFER <input type="checkbox"/> SEPARATION LEAVE <input checked="" type="checkbox"/> SPECIFIC ACHIEVEMENT	
ATTACHMENTS ADD <input checked="" type="checkbox"/> DETAILED OPERATION AC.DOC		MIDDLE NAME: SUFFIX: Sr.		12. NEW DUTY STATION ADDRESS (HOME ADDRESS FOR RETIREMENT/SEPARATION) Norfolk, VA	
HISTORY (0 Days 0 Hrs) ✓ LCPO Review: APPROVED By: Administrator Date: 12-14-2005 10:44:12 I approve. <input type="checkbox"/> changes r10 OLD: Transfer NEW: Specific Achievement ✓ Initial Submission: APPROVED By: Administrator Date: 12-14-2005 10:41:50 Mark is nominated for heroic action.		11. COMPONENT (USN, USNR, USMC, USMCR): USCG		13. PAYGRADE: RATING:	
		14. WARFARE QUALIFICATION		15. UNIT AT TIME OF ACTION	16. DUTY ASSIGNMENT
		17. UIC/RUC	18. CAMPAIGN: Cole Incident	18A. OPERATION	19. PREVIOUS PERSONAL DECORATIONS AND PERIOD RECOGNIZED
		20. RECOMMENDED AWARD: Silver Star			
		21. <input checked="" type="checkbox"/> HEROIC <input type="checkbox"/> MERITORIOUS <input type="checkbox"/> HEROIC <input type="checkbox"/> MERITORIOUS <input type="checkbox"/> MIA POSTHUMOUS POSTHUMOUS		22. PERSONAL AWARDS RECOMMENDED-NOT YET APPROVED	
		23. RECOMMENDED AWARD NUMBER: 1		24. OTHER PERSONNEL BEING RECOMMENDED FOR SAME ACTION	
		25. ACTION DATE/MERITORIOUS PERIOD BEGIN: END:		26. (FOR O-6 AND ABOVE) RANK AND NAME OF PREDECESSOR	
		27. GEOGRAPHIC AREA OF ACTION/SERVICE: DC National Capital Area		28. IF FOREIGN NATIONAL, INDICATE FOREIGN SERVICE AND COUNTRY	
		29. I CERTIFY THAT THE FACTS CONTAINED IN THE SUMMARY OF ACTION ARE <input type="checkbox"/> KNOWN TO ME <input type="checkbox"/> A MATTER OF RECORD			
		30A. ORIGINATOR NAME: RANK/GRADE:		30B. SIGNATURE 30C. DATE	

Local Intranet

A full audit trail of approvals and changes down to the field level are maintained for approvers.

Best of all, Captaris Workflow manages the process. Deadlines are enforced. Task assignments can be automatic or user driven. Captaris Workflow offers an impressive and flexible environment to enforce any organizational business rule.

Administration of this process is a snap. A Microsoft SharePoint Web part is available to show the status of potential award recipients and to make reassignments (Figure 3).

Figure 3. Awards are color coded accordingly for easier identification.

The screenshot displays a SharePoint web page titled "Navy Awards" with a "Captaris Workflow" section. Below this section is a "Workflow Model Summary" table with the following data:

Recipient	Award	Last Action	Last Date	Last User	Pending Action	Due Date	Assigned To
DOE, JANE	Bronze Star with Valor	DIVO Review Approved	12/06/05	Administrator	DLCPO Review	12/10/05	Administrator
JOHNSON, MARK	Silver Star	LCPO Review Approved	12/14/05	Administrator	DIVO Review	12/18/05	Administrator
DOE, JAMIE	N/A	DLCPO Review Approved	12/14/05	Administrator	DHA Review	12/18/05	Administrator

US NAVY TASK MANAGEMENT

With real-time information, military organizations must give commanders and subordinates the ability to effectively carry out ever-changing tasks. The US Navy has used Captaris Workflow to provide a Task Management solution that gives staff members the tools they need to collaborate and track task progress in real time, improving unit effectiveness and productivity.

Task creation begins with an automated template that allows authorized users to customize the subject, assign tasks, and attach documents and the body of a task form (Figure 4). Captaris Workflow automatically creates a routing list for a particular unit and groups, and the user decides which units receive the task, in what order and the assignment of relative roles.

Figure 4. Captaris Workflow automatically creates a routing list for a particular unit and groups.

The screenshot shows a web browser window with the following content:

Routing Table

Date	OK	Code - User
12/14	✓	-HEFLIN, Dan *
12/14	✓	-ALI, Mahmoud
		-CASS, Godfrey
		-CRANE, Ichabod
		-DOCS, Secure
		-FIELDING, Cecil
		-GABLER, Hedda
		-GILSON, Wayne
		-HANLEY, Kevin
		-HEFLIN, Dan <<
		-HYDE, Edward
		-JEKYLL, Henry
		-LATOUR, Jean
		-MARNER, Silas
		-MAULE, Matthew
		-POLLOCK, Guy
		-SMITH, Adam
		-SMITH, Winston

NCTAMSPAC ACTION PROCESSING FORM Routing Number: 051112

Subject: Eval Form

Due Date: 16-Dec-05 **Type:** Request **Priority:** High **Hard Copy:** No

Submitted: 14-Dec-05 **By:** Administrator **Phone:** 555-555-1234 **Email:** administrator@capa.local

Background: This evaluation will be completed via the task management system.

Discussion:

Buttons: Forward Form, Add New Routing, Add Attachment

Comments:

Buttons: Reject, Rework, Forward

Attachment	Attached By	Date	Last Modified	Date	Action
FITREP Eval Brag Sheet.doc	Administrator	14-Dec-05	Administrator	14-Dec-05	[check out]

Assigned User (Proxy)	Date	Status	Comments
ALI, Mahmoud (HEFLIN, Dan)	14-Dec-05 10:59	OK	
ALI, Mahmoud (HEFLIN, Dan)	14-Dec-05 10:59	OK	
HEFLIN, Dan *	14-Dec-05 10:59	OK	

A user can upload an unlimited number of attachments for each task. These attachments are stored in Microsoft SharePoint which is utilized for version control and document security.

Administration is straightforward and simple. A Microsoft SharePoint Web part (Figure 5) is available to show the status of potential award recipients, make reassignment and show progress based on the number of steps to complete the workflow. Awards are again color coded for easier identification.

Figure 5. A Microsoft SharePoint Web Part shows the status of potential award recipients.

The screenshot displays a SharePoint web part interface for 'Task Management'. The main section is a table titled 'Task Management Status' with the following data:

Route#	Type	Subject	Due Date	Author	Last User	Action	Date	Next User	Rec'd	Steps	Progress
051108	FitRep	Example	13-Dec-05	Administrator	HANLEY, Kevin	OK	12-Dec-05	HANLEY, Kevin		2/7	20%
051113	Request	Document Review	30-Dec-05	Administrator	HEFLIN, Dan *	OK	14-Dec-05	HANLEY, Kevin		2/3	66%
051114	Request	Policy Notification	29-Dec-05	Administrator	HEFLIN, Dan *	OK	14-Dec-05	HANLEY, Kevin		2/4	50%
051112	Request	Eval Form	16-Dec-05	Administrator	ALI, Mahmoud	OK	14-Dec-05	ALI, Mahmoud		2/18	11%

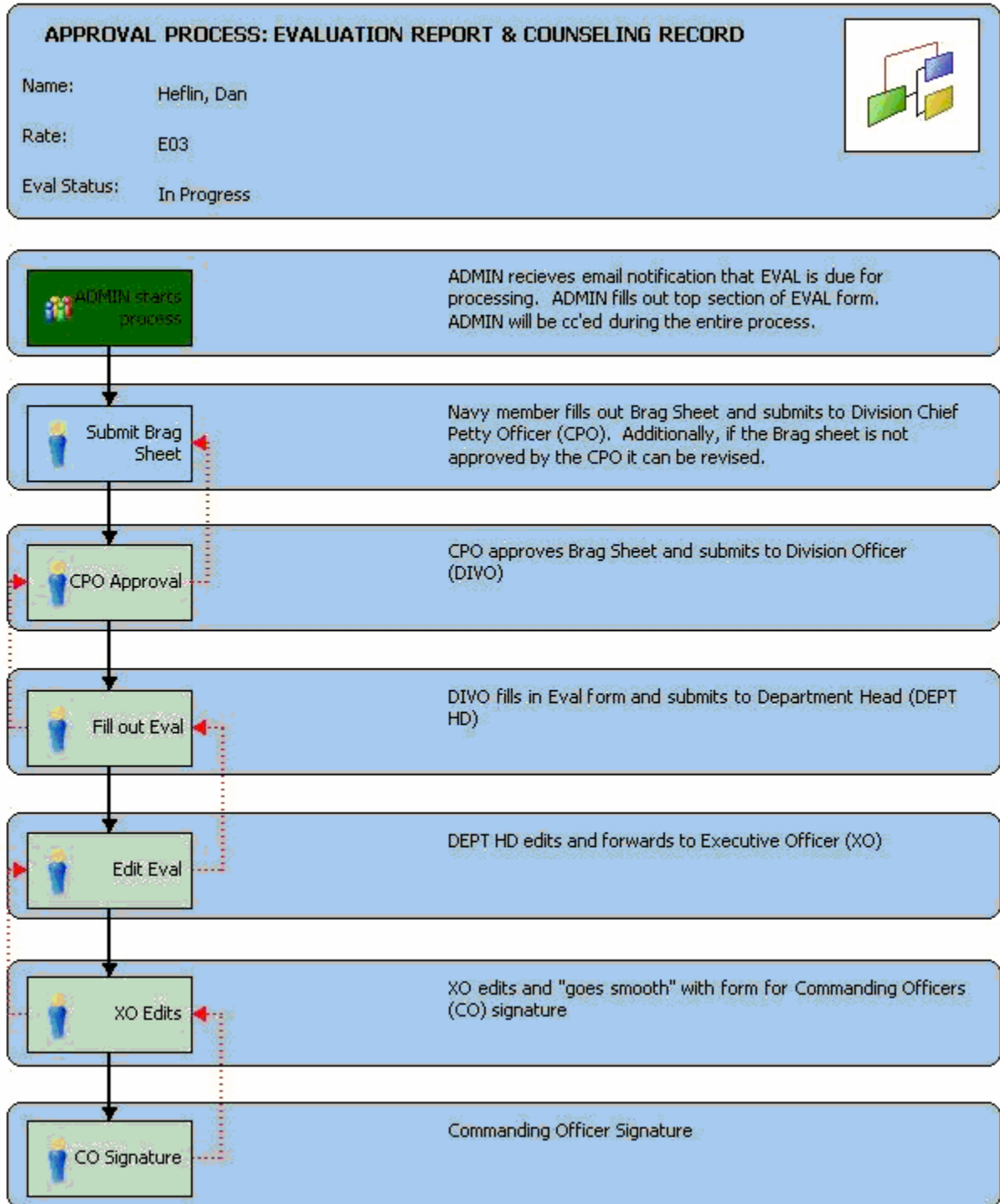
Below the table is a 'Captaris Workflow' section. It includes a search bar set to 'Military' and a list of tasks with their due dates:

Task	Process	Due Date
Fill out Eval	Evaluation - Hefflin, Dan(1110)	12/13/2006
COP Review	Travel Request for Dan Hefflin - 867	11/1/2006
DIVO Review	Awards1650v2(MarkJohnsonSr-USCG-1111)	12/17/2005
DHA Review	Awards1650v2(JamieDoe-USCGR-859)	12/17/2005
DLCPO Review	Awards1650v2(JaneCDoe-USCG-878)	12/11/2005

US NAVY FITREP/EVALUATION

Navy Officers receive regular performance evaluations in the form of Fitness Reports (FITREPs). The FITREP includes a description of the current duties and responsibilities of the officer, physical readiness rating, performance rating, comments describing the officer's performance, competitive ranking that measures the officer's performance in comparison to other officers being evaluated by the reporting senior, and a promotion recommendation.

Figure 6. The process can be configured to the exact requirements of the military unit.



An electronic FITREP or Evaluation form (Figure 7) is triggered from the Web page by simply clicking on the appropriate link.

Figure 7. An electronic FITREP or Evaluation form

EVALUATION REPORT & COUNSELING RECORD (E1 - E6) RCS BUPERS 1610-1

1. Name (Last, First MI Suffix) 2. Rate 3. Desig 4. SSN

5. ACT TAR INACT AT/ADSW/265 UIC 7. Ship/Station 8. Promotion Status 9. Date Reported

Occasion for Report Detachment Detachment of Reporting Senior 11. Individual 12. Reporting Senior 13. Special Period of Report 14. From: 12/6/2005 15. To: 12/21/2005

16. Not Observed Report Type of Report 17. Regular 18. Concurrent 19. Ops Cdr 20. Physical Readiness 21. Billet Subcategory (if any)

22. Reporting Senior (Last, FI MI) 23. Grade 24. Desig 25. Title 26. UIC 27. SSN

28. Command employment and command achievements.

29. Primary/Collateral/Waiver/standing duties. (Enter primary duty abbreviation in box.)

For Mid-Term Counseling Use. (When completing EVAL, enter 30 and 31 from counseling worksheet, sign 32. 30. Date Counseled 31. Counselor 32. Signature of Individual Counseled

PERFORMANCE TRAITS: 1.0 - Below standards/not progressing or UNSAT in any one standard; 2.0 - Does not yet meet all 3.0 standards; 3.0 - Meets all 3.0 standards; 4.0 - Exceeds most 3.0 standards; 5.0 - meets overall criteria and most of the specific standards for 5.0 standards are not all inclusive.

PERFORMANCE TRAITS	1.0* Below Standards	2.0 Pro- gressing	3.0 Meets Standards	4.0 Above Standards	5.0 Greatly Exceeds Standards
33. PROFESSIONAL KNOWLEDGE Technical knowledge and practical application	-Marginal knowledge of rating, specialty or job. -Unable to apply knowledge to solve routine problems. -Fails to meet advancement/PQS requirements.	-	-Strong working knowledge of rating, specialty and job. -Reliably applies knowledge to accomplish tasks. -Meets advancement/PQS requirements on time.	-	-Recognized expert, sought out by all for technical knowledge. -Uses knowledge to solve complex technical problems. -Meets advancement/PQS requirements early/with distinction.
34. QUALITY OF WORK Standard of work; value of end product.	-Needs excessive supervision. -Product frequently needs rework. -Wasteful of resources.	-	-Needs little supervision. -Produces quality work. Few errors and resulting rework. -Uses resources efficiently.	-	-Needs no supervision. -Always produces exceptional work. No rework required. -Maximizes resources.

Form template's location: http://capadc

The Captaris Workflow engine insures that the business rules for the evaluation process are constantly being enforced based on the unit's own requirements.

RESULTS

Solutions like the medal and awards process, task management and FITREP evaluation have been found to reduce process time by over 70 percent. Just as important, workers are able to easily track the progress and collaborate with others within the organization to improve the quality of the process. In addition, full audit trails are kept for every process allowing future analysis for additional process improvements and improved records retention.

Another key benefit with Captaris Workflow is the improvement in management supervision. Captaris Workflow maps Key Performance Indicators (KPI) within each process. Management can then decide on the metrics that they want to track to measure their process performance. This data is then available in real-time so managers can track on-going performance.

ABOUT CAPTARIS, INC.

Captaris, Inc. is a leading provider of software products that automate business processes, manage documents electronically and provide efficient information delivery. Our product suite of Captaris RightFax®, Captaris Workflow and Captaris Alchemy® is distributed through a global network of leading technology partners. We have customers in financial services, healthcare, government and many other industries, and our products are installed in all of the Fortune 100 and many Global 2000 companies. Headquartered in Bellevue, Washington, Captaris was founded in 1982 and is publicly traded on the Nasdaq National Market under the symbol CAPA. For more information, please visit www.Captaris.com.

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