



## DATASHEET

# Captaris® Workflow Technical Overview

Captaris Workflow Provides Organizations with an Easy, Flexible and Integrated Workflow Solution Applicable to Vertical and Horizontal Environments

## SOLUTION OVERVIEW

Captaris Workflow is the solution of choice for business process automation in Microsoft environments. Captaris Workflow provides ready-to-use features for rapidly automating simple or complex workflow processes, as well as capabilities to manage and monitor automated implementations. Developed using Microsoft Visual Studio .NET, Captaris Workflow integrates seamlessly into any Microsoft .NET-connected environment. Captaris Workflow enhances Microsoft business productivity environments by automating standard interactions between information workers and Microsoft Office System applications in the creation of workflow solutions. With its support of XML and Web services, Captaris Workflow can be an efficient, dependable guide for streamlining the interaction between business processes and business productivity software tools.

Captaris Workflow allows for a high degree of flexibility for information workers, who can quickly assess what step in a workflow needs to come next and keep the flow of business moving smoothly. Workflow and tasks can be launched, re-worked and escalated on demand, from a variety of clients. Captaris Workflow strongly connects remote and mobile information workers, giving them access to the workflow through wireless PDAs, the Tablet PC, instant messaging or even low-bandwidth Internet connections and their Web browser. Captaris Workflow provides a thin browser interface that users can access over the Web or the corporate intranet.

Captaris Workflow makes good business sense. Captaris Workflow gives decision makers a precise methodology to evaluate the value of their Captaris Workflow implementation and assess complex process automation projects.

## CAPTARIS WORKFLOW WIZARDS

Captaris Workflow includes a number of wizards to empower non-technical information workers to create workflows on their own and to increase the effectiveness of developers. There are two wizards of especially high value for Captaris Workflow users in a Microsoft environment:

### Captaris Workflow Wizard for Microsoft Content Management Server

Enhancing Web site publishing and management functionality of Microsoft Content Management Server, this tool provides powerful workflow extensions to corporate Web site publishing processes. Administrators or project leads can create Workflows with an easy-to-use wizard interface.

## Captaris Workflow Wizard for Microsoft SharePoint products and technologies

Captaris Workflow combines with Microsoft Office SharePoint Portal Server 2003 to extend document management solutions by automating simple or complex, document-related collaboration and approval workflows. Approval workflows can be multi-approval, multi-author or even inter-enterprise. This workflow wizard empowers information workers to build and deploy workflows embedded into SharePoint Portal Server without any scripting.

### TECHNICAL ADVANTAGES

Captaris Workflow allows you to automate complex workflow processes easily and results in increased productivity and efficiency for the entire organization. It includes ready-to-use features, as well as capabilities to manage and monitor automated implementations.

#### Key Benefits

- Increase the productivity of Microsoft business productivity software
- Reduce the cost of deployment and training and accelerate user acceptance by integrating business processes directly into Microsoft Outlook
- Reduce the IT overhead for support and training by maintaining a familiar, integrated operating environment
- Lessen workload by enabling users to easily create workflows on their own
- Customize Captaris Workflow and wizard-built workflows with the Captaris Workflow Integrated Design Environment (IDE)
- Incorporate mobile and remote users, wireless devices and Tablet PCs seamlessly into the enterprise technology environment
- Accelerate developers' work with the easy-to-use and powerful IDE
- Connect workflows to legacy or proprietary systems
- Automate common business processes without coding via wizards
- Review and revise business processes at any time with comprehensive business activity monitoring tools

### SOLUTION ARCHITECTURE

Captaris Workflow was developed using Microsoft Visual Studio .NET in Microsoft C#. Its powerful set of .NET business objects can be rapidly integrated to form deployable workflow solutions. Captaris Workflow has been designed using a three-tier architecture. Captaris Workflow suits the roles of the people who interact with business software: information workers, business managers, software designers and system administrators. This approach creates an extremely high degree of flexibility, ease-of-use and speed of development in the Presentation Tier.

In Captaris Workflow, a visual model represents the workflow of any business process. The model can serve as the canvas for the IDE and can also serve as the GUI for workflow applications. Each model comprises workflow objects, resource objects and data management objects. Each of these objects is designed to increase the speed and accuracy of developers building workflow applications.

Within the IDE, developers can open an existing model, start with a blank canvas or drag in a Microsoft Visio diagram to quickly generate results. As developers create the workflow by dragging and dropping objects, they automatically generate the workflow in Visual Basic .NET. For enhanced flexibility, Captaris Workflow also makes direct script editing available. Captaris Workflow also includes a new Visual Studio Toolkit which provides organizations with the ability to leverage both the Captaris Workflow IDE and Visual Studio for developing and debugging workflow. Core drag-and-drop development capabilities still occur within the Captaris Workflow IDE, and now coding and debugging can occur within the Visual Studio 2003 IDE. This VS Tool Kit enhancement provides the groundwork for deeper Visual Studio integration and provides developers with the ability to use Visual Studio to write code behind task events and perform debugging in either C# or Visual Basic.NET. Captaris Workflow also now has more direct access to .NET assemblies that were built and compiled within Visual Studio. Developers are now able to access Visual Studio's robust windows and Web form designer, Intellisense and debugging capabilities to further accelerate model development cycles.

In addition to increasing speed and accuracy of developers, the wizards can lower the cost of implementing workflow automation. Non-technical workers can use the Captaris Workflow design wizards to set up and deploy automated workflow solutions for simple processes without coding or deep technical expertise. Design wizards can quickly create common workflow components, such as forms, emails, XML extensions and Web service connections.

## OVERVIEW OF THE THREE CAPTARIS WORKFLOW TIERS

### Tier 1: Presentation Tier

The function of the Presentation Tier is to display information to the user and capture user input. At this level, any business logic or database access is prohibited, which guarantees the integrity of the system and allows it to scale to support additional users and capabilities while remaining stable and dependable. The Presentation Tier consists of user controls and ASP pages. Users can interact with the Captaris Workflow Client Workflow Services (CWS) through ASP pages, Windows SharePoint Services, SharePoint Portal Server and Office System applications, using a desktop PC, Tablet PC, Pocket PC or PDA. Users can also advance a workflow through their Web browser.

### Tier 2: Business Tier

The Business Tier functions as the logic layer that delivers information to the Presentation Tier. It executes on business rules using .NET objects and returns the results to the caller. The Business Tier usually runs on the application or Web server. In the Business Tier, system administrators can leverage the interfacing of Captaris Workflow with Microsoft Active Directory to establish and manage organizational roles by enterprise, role and process, relationship and role grids, and profiles. Business activity monitoring in the Business Tier can take place in out-of-the-box fashion or be directed toward the monitoring of objects, task, calendar and work management or charting.

### Tier 3: Data Tier

Using Captaris Workflow Server Workflow Services and XML, the Data Tier sends and requests information from databases and returns results to the caller utilizing XML, HTTP and TCP protocols. Databases can include Microsoft SQL Server, legacy and proprietary systems and other data stores. The Data Tier can safely cross enterprise firewalls to make data available to remote or mobile users.

## EXTENSIBILITY

Captaris Workflow is extensible via standard Web service interfaces. Captaris Workflow is a certified .NET connected premium product, which means it can be easily integrated with other .NET-connected products.



As a platform for business process workflow, Captaris Workflow offers substantial opportunities for third-party integration and customization, which in large part has driven the rapid growth of the partner network.

## TECHNICAL REQUIREMENTS

Captaris Workflow requires a Microsoft Windows 2000 server and a Microsoft SQL Server 2000 database. On the client side, Captaris, previously known as Teemplate can run under Microsoft Windows 98, Windows NT, Windows 2000 and Microsoft Internet Explorer 5.0.

## ABOUT CAPTARIS WORKFLOW

Captaris Workflow is a process automation solution that improves the access and control of unique business processes for compliancy and competitive advantage. Captaris Workflow makes it fast and easy to develop and support workflow applications within Microsoft environments, increasing collaboration, productivity and accountability. By integrating with Captaris information delivery solutions, Captaris Workflow enables best-in-class processes that ensure the right people get the right information at the right time.

## 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<sup>®</sup>, Captaris Workflow and Captaris Alchemy<sup>®</sup> 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](http://www.Captaris.com).

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