

## MOBIUS® WORKFLOW

Transform Work Processes

### MAXIMIZE PRODUCTIVITY

Embedded workflows help organizations streamline and automate repeatable and scalable business tasks by automating and connecting people to content and processes. They improve quality by minimizing human-errors, increasing productivity and enabling collaboration. Mobius Workflow acts on content stored in the Mobius content repository as well as information from business systems such as ERP, HR, Finance, CRM and Project Management. It connects to enterprise systems via web services (webhooks) to incorporate specific content into its content-centric workflow. This approach allows organizations to automate workflows across multiple systems, connect people to business processes and give them the content they need to complete their work.

### MOBIUS WORKFLOW

Users familiar with business processes can build workflows using Mobius' no-code/low-code visual workflow designer. Mobius workflows are executed by a workflow process engine and managed in the workflow monitor.

**Mobius Workflow Designer** provides a drag and drop interface and visual diagram that displays the business flow. The Mobius process modeler is compliant with industry-standard BPMN 2.0 specification. The process representation is understandable by everyone - designer, end user, management and IT - making it easy for users to quickly assemble embedded workflows to align with their business processes. Once designed, designers can publish, copy and edit workflows to rapidly update and enhance existing processes and deploy new ones.

**Mobius Workflow Inbox** enables workflow participants to see assigned workflow tasks, search and browse for documents and initiate workflows as needed. Users within the workflow can select items from the sortable inbox, access the content item, act as requested and then continue the workflow to the next step and ultimately to completion. They can see workflow items that have been initiated or assigned to them including the workflow description, date and time initiated, as well as the priority status (high, medium, or low) and due date. Users also view workflow status notifications for their tasks that are in process and can sort or filter workflow notifications as desired (Received Date, Sender Name, Status, Due Date, etc.).

**Workflow Monitor** is the administrative interface. It is used to make workflows available for business processes, show them in process and present their status. Workflow Monitor is also used to manage the configuration of users in a workflow and view what work is assigned to whom. Troubleshooting workflows, and reassigning work is also performed from this administrative screen.

### BENEFITS

- Use content-oriented workflows to quickly and easily manage common processes
- Avoid IT backlogs - business users can create, execute & manage processes
- Manage workflows to completion by tracking workflows with in-process monitoring & alerts
- Meet needs of rapidly changing business conditions with agile process changes
- Track and improve performance with overall workflow management execution

### MAIN FEATURES

- Workflow services embedded within the Mobius environment
- Graphical design tool suitable for business users
- BPM 2.0 workflows can be imported and exported
- Workflow Inbox sends notifications to engage participants in processes
- Workflow Monitor enables oversight of processes

**MOBIUS WORKFLOW DESIGNER**

The Workflow Designer interface shows a flowchart for the '0 Vendor Invoice Audit' process. It starts with a 'Start' node, followed by 'Verify Discount', a decision diamond 'Verify Decision', and then 'Add Debit Note' and 'Add Vendor Corrective Action Request' tasks. A 'User Task' panel on the right shows details for 'Add Debit Note'.

**MOBIUS WORKFLOW INBOX**

The Workflow Inbox displays a list of tasks with columns for 'Task', 'Status', 'Priority', and 'Due Date'. Tasks include 'Accounts Payable Manager', 'Internal Auditor', and 'Accounts Payable Manager'.

**MOBIUS WORK ITEM**

The Work Item interface shows details for a 'Vendor Invoice Audit' task. It includes a 'Details' tab with a 'Review Invoice for discount' section and a 'Vendor Invoice' section. A 'Sample Supplier Corrective Action Request' document is also displayed.

**MOBIUS WORKFLOW MONITOR**

The Workflow Monitor interface shows a list of tasks with columns for 'Task', 'Status', 'Priority', and 'Due Date'. It includes a 'Filter' section and a 'List of Activities' section.

**Example 1:** Routing Records for review and approval for retention, holds, and final disposition status changes

**Example 2:** Exception audit of Invoice and Payment related irregularities (Accounts payable and Accounts Receivable); workflow to investigate root cause regarding data exceptions and take corrective action

**Example 3:** Index data associated with Content is determined to be incorrect. Workflow is initiated to review and correct this bad data.

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