



# OBJECTIVE PERFORM FOR CONTENT MANAGER

## Activate your content to automate and streamline business processes

**Deliver improved efficiency, transparency, quality and collaboration by activating the content within your information platform.**

**Micro Focus Content Manager delivers information governance to countless organisations worldwide. Objective Perform extends this governance to content-driven business processes driving innovation and efficiency.**

### HIGHLIGHTS

#### **Designed for Micro Focus**

**Content Manager** - Objective Perform adds value to and works seamlessly with Content Manager, powering content-driven processes.

**Deliver better outcomes** - for management, staff, constituents and customers by digitising processes that improve customer service delivery and drive digital transformation initiatives.

**Increase efficiency and remove bottlenecks** - by enabling staff to manage business processes on their mobile platform of choice while ensuring the business retains transparency and auditability.

**Ensure governance** - run automated business processes that are auditable and respect the information governance policies as implemented throughout your Content Manager platform.

### DESIGN INNOVATIVE PROCESSES, COMPLY WITH REGULATIONS AND MEET KPIS

With capability to define and automate business processes, Objective Perform provides a framework to consistently execute business processes that boost efficiency and reduce dependency on key individuals. It enforces standard operating procedures, minimises errors, helps meet deadlines and other key performance indicators (KPIs). Transparency and accountability are delivered through complete audit trails of process activities, helping organisations comply with external regulations.

Objective Perform meets the needs of all types of users that engage with business processes.

- **Business users** have both the tools and trusted information at their fingertips to confidently make decisions and progress tasks.
- **Managers** have complete visibility across the breadth of business processes empowering them to balance workloads to time frames and escalations.
- **Workflow designers** are equipped with easy to use tools to design and streamline processes that reduce costs, improve productivity or shorten process cycle times.
- **Developers** can access detailed controls enabling them to fine-tune and tailor workflows to suit the organisation's needs.

### WHY IS OBJECTIVE PERFORM A NATURAL EXTENSION OF CONTENT MANAGER?

Seamlessly integrated with Content Manager, Objective Perform is delivered via an intuitive web based interface that can be accessed by the user's device of choice. Objective Perform ensures that information governance, security and auditability are always respected and visible through your Content Manager platform.

Objective Perform is a robust workflow platform that supports industry or process specific business applications that have delivered demonstrable benefits to government and regulated industries for more than 30 years.

## Objective PERFORM



# 58%

**58% of public sector organisations indicated that things are getting stuck in their processes, as the top process challenge.**

Source: AIIM

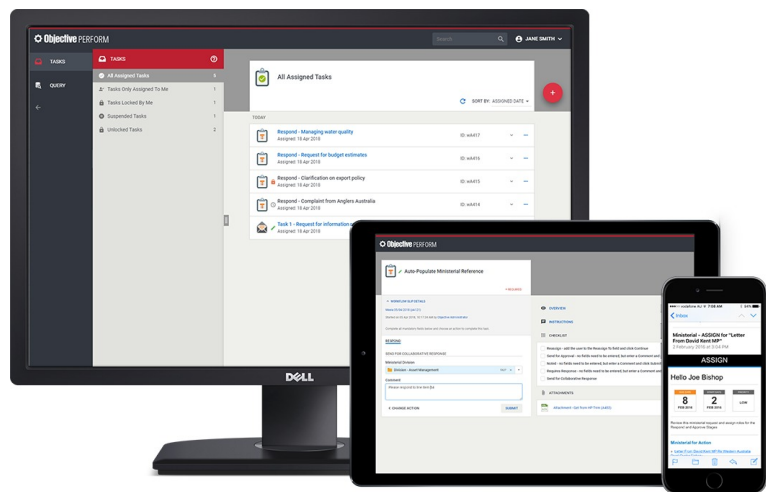
## KEY ATTRIBUTES FOR BUSINESS USERS

As business users engage in processes powered by Objective Perform, they have everything they need to complete a task, at their fingertips. Processes are kept on track through the use of notifications, reminders and alarms, while managers have full process transparency and tools they need to balance time-frames, workloads and escalations.

### Easy to use browser interface for maximum user adoption

Objective Perform provides a frictionless workflow management experience to the user when interacting with Content Manager content. Powerful functionality is delivered to users via intuitive controls in a modern, responsive browser interface.

Users are not required to learn two systems; they simply manage their tasks through Objective Perform, while information is accessed, in real time, from Content Manager in the background, respecting its information governance rules.



Users can contribute to business processes from any device, wherever they choose to work.



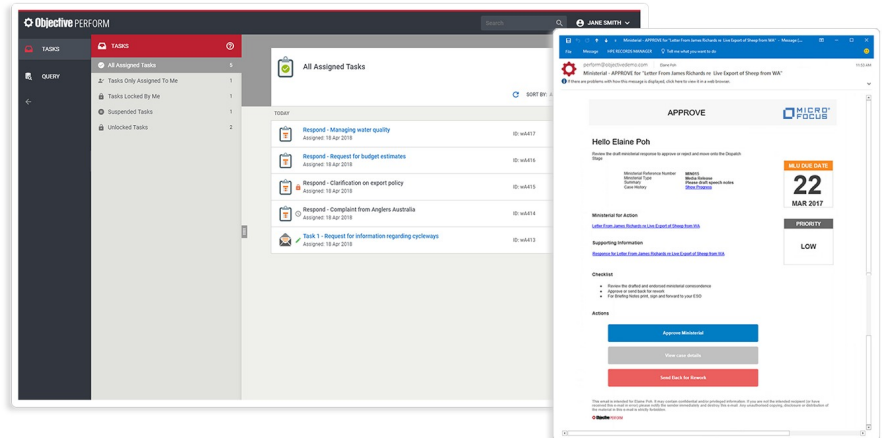
**HOURS PER DAY  
OF MANUAL PROCESSES  
ELIMINATED**

Source: State Trustees, Victoria

### Action tasks from anywhere

Objective Perform offers flexibility for business users to engage with processes in a manner that suits their working style, location and on the device of their choice. This ensures processes aren't stalled, particularly when reliant on mobile workers.

- **Task List** - business users can select from a queue or task list. This method suits users who regularly contribute to processes, and want direct access to their tasks and pick up their next task from a queue.
- **Actionable Email** - business users receive an email that contains all the relevant information they require to action a task. This method suits those users who contribute to processes on a more ad hoc basis, or are often away from the office. Known as Actionable Emails, users can approve work or allocate tasks directly from the email. Every action is audited and therefore traceable.



Tasks are delivered to business users in either a task list, or an Actionable Email.

### Automate processes using content from Micro Focus Content Manager

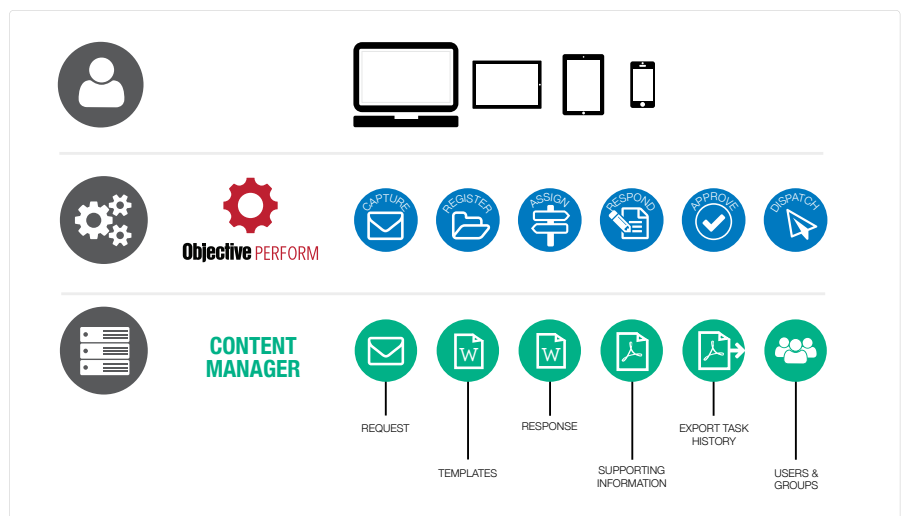
Objective Perform is seamlessly integrated with Micro Focus Content Manager so that business processes leverage content directly from Content Manager, not a separate interface. This ensures the information governance rules, including security and user access profiles enforced through Content Manager are always maintained.

As automated processes progress through their stages, business users work from task screens while content is automatically authored, edited and reviewed, without the users needing to know the documents' location or version in Content Manager.



RESPONSE TIME  
FROM 14 DAYS  
TO 2 DAYS

Source: Department of Primary Industries and Regions, South Australia



All content resides in Content Manager while Objective Perform manages the processes. Users contribute to processes from anywhere they work.

Documents such as initial requests, document templates, responses and supporting information are never duplicated, they are always sourced from Content Manager, maintaining a single source of the truth.

As business users focus on their work, CIOs and information managers are assured that governance of both their information and processes is always respected. Objective Perform utilises Content Manager's underlying information governance capabilities including version control, audit trail, notes and metadata synchronisation, ensuring governance standards are maintained.

## Objective PERFORM



### TRANSPARENCY ACROSS PROCESSES

Quickly identifies  
**bottlenecks**

Identifies opportunities  
for **quality  
improvement**

Provides a complete  
**history of all  
actions and approvals**

Provides a foundation  
for **information and  
governance**

Source: Department of Premier and  
Cabinet, NSW

### Monitor processes to maximise performance

A range of reporting methods within Objective Perform help business users make informed decisions, enhance process governance and report on key activities.

**Monitor to Manage** - Access business process performance data to analyse process activity. This can then be used to implement ongoing improvements to increase productivity or shorten process cycle times. Objective Insights<sup>1</sup> provides a set of standard dashboard reports which can be configured to suit your process and business requirements.



Dashboards using Objective Insights, provide visibility of content-driven processes, where progress to KPIs can be monitored, bottlenecks identified and staff effectively engaged.

**Monitor to Refine** - Bottlenecks, personnel expertise and volume all make a difference to delivering against targets. By tracking the progress, managers can identify pain points and make changes to business processes.

**Monitor to Comply** - The ability to understand who made what decision when, based on what information is as crucial now as it is in 18 month's time. With Objective Perform, every action taken, every decision made and every change to content is recorded and auditable.

**Monitor to Achieve** - Using reports within Objective Insights, monitor process performance against your organisational KPIs.

1. Objective Insights requires a separate license to Objective Perform.



## POWERFUL CONTROLS FOR WORKFLOW DESIGNERS

Objective Perform provides process analysts and workflow designers with easy-to-use tools, to design and streamline business processes that help organisations meet deadlines and deliver better quality outcomes.

Workflows can be designed to provide business users with a work package that contains all necessary resources required to complete a given task within the process, eliminating wasted time searching for information or previous decisions.

As business priorities or requirements change, the process workflows can be easily modified to reflect the changes.

### Workflow design concepts

Objective Perform supports a range of workflow design concepts delivering workflow designers flexibility to define automations to suit almost any business process.

**Process-centric workflows** - where the process is at the core; gathering content along its path to achieve the process outcome. For example, an HR on-boarding process, where multiple departments and pieces of information, both incoming and outgoing are required where it's critical that each step is followed.

**Information-centric workflows** - where content is at the core; being processed, updated, added to and refined as it progresses through its lifecycle. For example a policy document being reviewed, updated and approved prior to publishing.

**Serial routing** - provides the control required to ensure that tasks are undertaken only once all relevant information has been collected and task steps completed.

**Parallel routing** - takes advantage of the electronic format of content by enabling multiple users to contribute to the same process at the same time.

**Structured processes** - where processes are very structured and sequential in nature and require automated decision making, for example, invoice processing.

**Ad hoc processes** - are used where the process changes depending on the content, the outcome of reviews and the decisions made, for example, document reviews.

**Hybrid processes** - combine the concepts of structured and ad hoc processes to accommodate flow changes mid-stream. If the user decides additional people should be included in the process, for example, a subject matter expert is included in a Freedom of Information request.

**Associated processes** - can be initiated at any stage of the main workflow allowing information workers to include additional processes; for example, a legal review or collaborative response.

### Objective Perform structure

When a workflow is run by a user or is generated by another system or event, it generates a workflow slip. These workflow slips represent the running instance of the business process and include metadata. Each time the same workflow is initiated a new slip is created to represent the new running instance.

A business process can be run from the one workflow many times; re-using the defined business process. The workflow can be modified to accommodate changes in the process and any subsequent slips that are run will utilise the new workflow process.

Each slip generated is stored as a record and is therefore auditable should the future need arise.

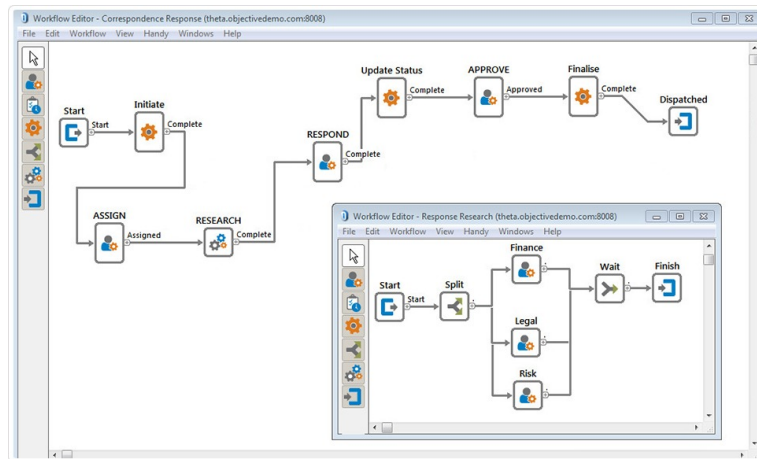


### Graphical process designer

Objective Perform includes a graphical workflow design tool that provides a canvas on which designers drag and drop different tasks from a palette to represent the various steps in a business process. Tasks are linked based on user actions, decision tasks and split/join tasks to create the path the workflow follows based on defined conditions.

Virtually any business process can be defined entirely using the workflow designer; ranging from a simple one-step approval process through to a complex employee on-boarding process or decision-based workflow such as an invoice approval.

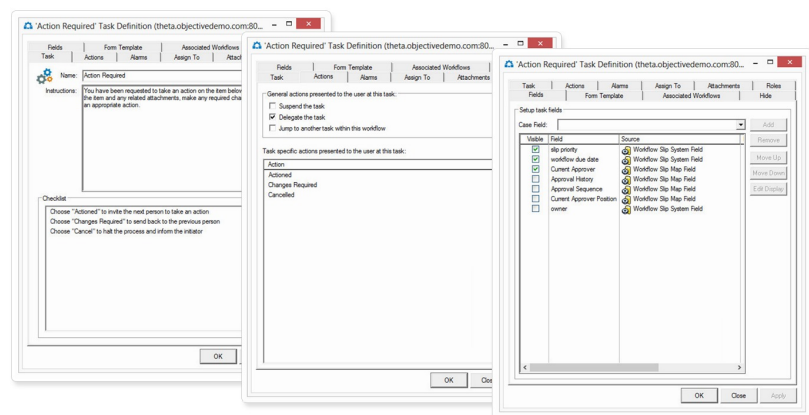
The graphical process designer enables business analysts and workflow designers to create and build workflows without the need for specialist IT assistance.



Graphical process designer enables business and process analysts to design and build workflows. This example shows a nested workflow within the larger workflow map.

### Workflow properties

Designers can define properties for the workflow and for each task in the workflow.



Dialogues screens allow designers to define properties for the workflow and ease task.

**Metadata** - Information relative to the process can be captured in the form of metadata. This metadata can then be configured to display, or not, on each specific task, which allows only the relevant information to be presented to the user for that specific task.

**Priorities** - Priorities are assigned to a work slip at the time the workflow is started and a default work slip due date can be calculated using a time duration associated with the priority. The priority can subsequently be displayed and, if required, changed by a user manually or based



on business logic the priority can be changed by a background task during the execution of the work slip. Alarms, escalation, processing and downstream background task logic can also be changed based on the work slip's priority.

**Alarms** - Objective Perform allows multiple alarms and escalations, to be defined for each task in a workflow. These alarms are time based and can take different actions based on a duration since the work slip was started or a task is assigned or started. Alarms can be configured to send emails, complete tasks or run automation scripts.

#### **Workflow tasks**

Workflows are defined using a variety of tasks linked together to reflect the steps and different paths in a business process. A workflow can comprise any combination of different task types:

**Manual Tasks** - Manual tasks allow the user to take different actions that can control the path taken through the workflow. They can include customised instructions and checklists to be displayed to the user, as well as links to template documents or policy and procedure documents to ensure staff have access to all the information required to execute a task in a consistent and efficient manner.

Objective Perform supports ad hoc processing from a manual task, which can allow the task owner to change the assignment of tasks or identify the task to which a workflow can progress instead of following the 'designated' path. This includes re-routing to previous process steps if re-work or reallocation is required.

Manual tasks can be allocated to individual users, groups of users or position-based roles. Both groups and roles can contain multiple users and a user can belong to multiple roles and groups. When a task is assigned to a group, all users in the group receive notification of the task and members of the group are responsible for determining if they action the task. Once the task is actioned it is removed from all users in the groups task list. Similarly, when a task is assigned to a role the user(s) currently in that role will receive the notification of the task. Using position-based roles allows tasks to be assigned to the user currently performing a business role or function, regardless of how that user changes over time.

**Decision Tasks** - A decision task allows different paths to be taken based on the result of the decision. For instance the amount of an invoice can dictate additional approvals steps. Decisions are performed by the system (not the user) based on data associated with the work slip or a stored procedure.

The Decision task type may be used to automate evaluation of workflow slip metadata to determine a process path.

**Background Tasks** - Background tasks are used to automate common, routine and repetitive tasks or perform more complex decision-making as part of a workflow.

Often the outcomes and decisions made in carrying out one business process will require initiation of one or more additional processes. Incorporating one or more associated workflows within a parent workflow design enables one process to optionally initiate multiple independent processes.

**Nested Workflows** - Objective Perform can nest other workflows within a workflow at specific points in the process. This allows the creation of a library of re-usable modular workflows that perform common tasks, such as serial approvals, creating a folder, or any other common task.





### Design task forms that contain everything business users need

Objective Perform automatically generates HTML based task forms that allow users to both initiate and participate in workflows that contain instructions, checklists, fields and actions.

Task forms provide a straightforward display of existing workflow metadata items such as fields, roles, actions, checklists, etc., with the ability to open case objects and attachments. The assignee modifies fields using the available user interface elements (buttons, drop downs, etc.) and completes the task, which will progress the slip to the next configured step.

Objective Perform task form showing action required, checklist and relevant content attached.

Conforming to responsive design principles they can be accessed across a range of devices including desktops, laptops and mobiles. The forms automatically adjust to the available real estate and optimise to native features of the platform, i.e. touch is available on touch enabled devices, providing users access to the same information and functionality.

These web based task forms are generated based on information defined by the workflow designer and templates. Customers are provided with a copy of the default templates which they can modify to change the logos, images or incorporate other corporate branding elements.

A comprehensive client side JavaScript library is also provided giving extended capability to access the features of the workflow from within the running form. This means that workflow builders can choose where and how to display metadata, as well as change what information is presented to the business user in the context of the action.

Task forms can be further extended using normal web development techniques:

- call web services to provide additional context to users
- initiate processes in other systems as part of completing or submitting a task forms
- include graphics or other supporting information
- include content from other applications





## TECHNICAL CONSIDERATIONS - FOR DEVELOPERS

Objective Perform provides a flexible approach to tailoring content to the users.

All workflows, automation scripts, metadata fields, form templates, email templates and any other object used by a workflow are stored in Perform's object repository and subject to version control, publishing, security and audit.

### Starting Workflows

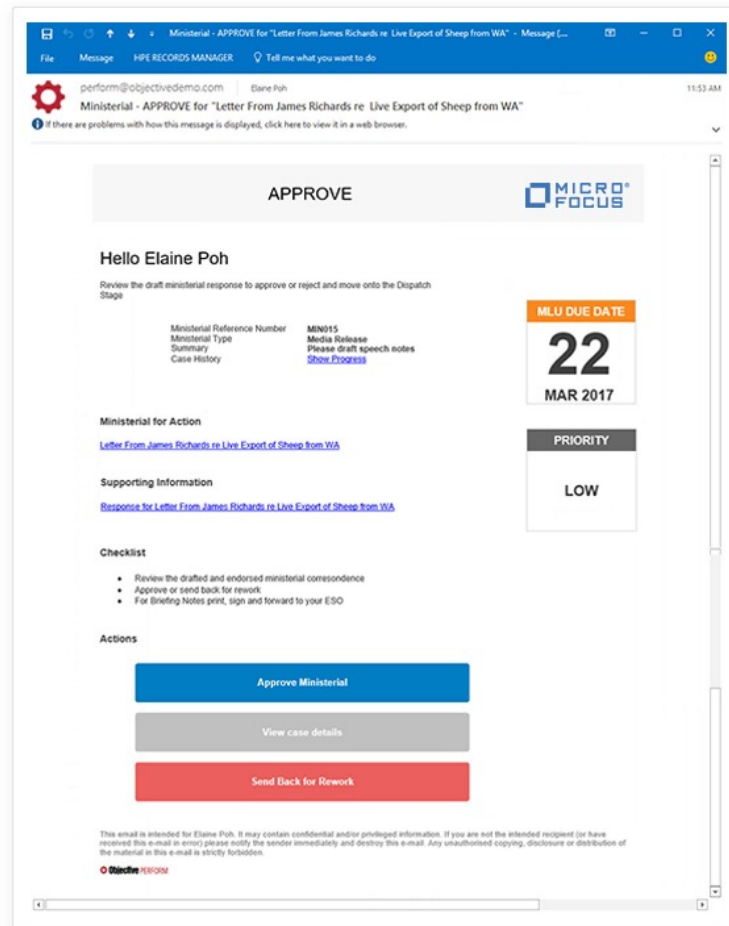
Workflows can be started using Perform in a number of different ways:

- [HTML Forms](#) - users can initiate workflows manually using HTML based forms hyperlinked from applications, intranets or other web portals.
- [Within Content Manager](#) - users can initiate workflows from within Content Manager attaching a reference to objects within the content management system to the work slip
- [Automatically](#) - workflows can be started automatically based on a schedule, for example 10am every work day
- [RESTful web services](#) - workflows can be started using the RESTful web services provided by Objective WebTalk+. WebTalk+ provides a full range of web services to allow external applications to integrate with Objective Perform.

When a workflow is run by a user or is generated by another system or event, it generates a work slip. These workflow slips represent the running instance of the business process and includes metadata, such as a case object, attachments, slip owner, roles, and catalogue fields. Each time the same workflow is initiated a new slip is created to represent the new running instance. This means a business processes can be run from the one workflow many times and the business is able to gain benefit from reusing defined business processes.

### Actionable Email

Tasks can be configured to deliver a content rich, HTML formatted email providing the user with all necessary information, metadata, links to documents, etc., required to complete the task, as well as "action buttons" allowing the user to complete the task from the email without having to leave their email client.



Create graphically rich emails to provide business users with all of the information they need to make informed decisions and action a task.

By providing users not only the task action, but also contextual information around the task, they are able to make informed decisions, without needing to search through other systems.

Delivery by email, allows users to action tasks from their device of choice, whether that be their smart phone, tablet, laptop or desktop, process bottlenecks are minimised, interruptions are reduced and your business users can stay focused on doing their jobs.

Perform uses standard SMTP and IMAP protocols to send and receive email at a server level and when users action tasks from actionable emails the return email is encoded with a security token so that only the person assigned to the task can action that task.

### Scripting Language

#### Automated Extension Engine (AxE)

The Perform Automated Extensions Engine (AxE) is used by background tasks and provides the ability to automate repetitive tasks or perform more complex decision making as part of a Workflow. AxE includes an XML like scripting language and Objective Case Management Extensions (OBJCMX).

#### OBJCMX

OBJCMX is an XML based scripting language, that allows background tasks to be configured, not coded, to perform a number of common workflow and document management functions. It can be used to reduce human effort, speed up processes, reduce costs and help enforce consistency (for example, classification, and naming). Its capabilities include:



- Creating a case file container.
- Rendering workflow slip to a PDF document.
- Copying a template document.
- Setting the container of a record.
- Changing the title of a record.
- Setting the access, security, to a record.
- Attaching a record to a worksip.
- Finalising and removing revisions from a record.
- Creating a record, with or without a container and/or category.
- Creating a PDF of the workflow slip status.
- Starting a workflow against a case.
- Updating fields on a case.
- Suspending a task, slip or case.
- Selecting assignees for manual workflow tasks.
- Sending emails.
- Accessing databases.

#### API Integration

In addition to the built-in functions, Perform can also be extended using a documented API and java reflection to easily reference customer developed functions from OBJCMX allowing Perform to execute almost any operation required against an external system. This integration then provides a compliant, secure records management store across your organisation.

#### Monitoring

Perform automatically maintains an audit of all activities that occur during the life of a work slip and it contains entries of actions, dates and times of actions, changes to form fields, as well as any comments entered by users against a task. This data can be used in many different ways to help manage processes or provide evidence of an action occurring. For example:

**Electronic Approvals** - the outcome of a manual task, details of the authenticated user performing the action and the recorded timestamp in the audit trail is used by many organisations as evidence of an electronic approval.

**Record of a Workflow** - The status and history of an individual worksip can be viewed in the history card of a task slip. Through a query on the workshop's case object and the worksip's audit information - a PDF document can be created and stored in Content Manager as a record of the workflow.

**Queries for Status and Progress Reports** - The Perform audit trail can also be queried through the query interface to create ad hoc or reusable queries to show the status and progress of work slips based on a wide range of criteria.

**Queries for Activity Reports** - queries can also be used to develop standard style on-screen reports of activity by workflow type, group, department or other criteria as required.



**Dashboard Reports** - To complement Objective Perform, dashboard reporting is available using Objective Insights to show: Process Activity, Open Assignments and Monthly Performance. Objective Insights dashboards are standard reporting templates using Microsoft Power BI<sup>2</sup>.

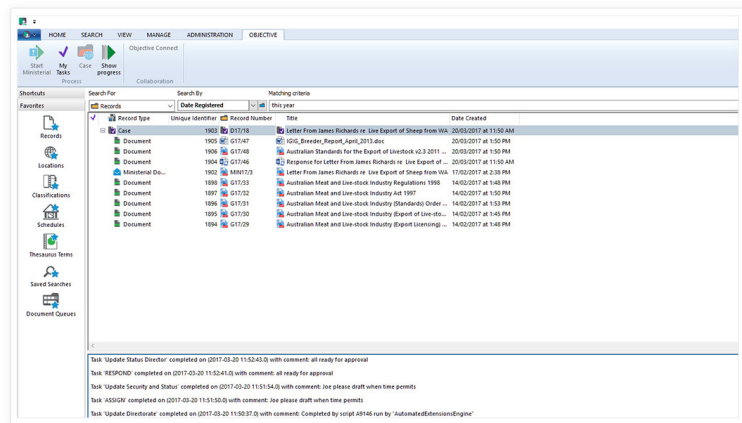
Customers can extend these reports or leverage the templates to develop their own dashboards to support their unique business requirements. Taking advantage of Power BI customers can also create cross-system dashboards to provide a 360° view of processes using statistics from Objective Perform combined with data from other business systems.

These reports are based on the audit information collected automatically by Objective Perform and can be extended to show time-based reports, performance against KPIs or other statistics as required.

There are 2 models of deployment available for Objective Insights, workstation deployment and cloud-based (Office365) deployment.

### Content Manager Integration

Objective Perform provides out of the box integrations allowing sophisticated business processes to be mapped while integrating with Content Manager where it needs to, while providing an outstanding experience to the users. Some of these capabilities are listed below.



All underlying content of a case is captured in a single folder, along with notes specific to the process.

**Document generation** - Automatically create a document, when required based on a template stored in Content Manager.

**Container creation** - Automatically create a case folder for each business process, so that any supporting information can be referenced.

**Document re-visioning** - Using Content Manager's native re-visioning capabilities information governance is seamlessly included to be handled as part of the business process.

**Content finalisation** - The ability to use Content Manager's finalisation capability for all content at the end of the business process.

**Security modification** - Automatically, as part of the business process, open up or secure the case folder, for sensitive information, where required.

**Microsoft Word template population** - Automatically populate templates with Content Manager metadata, such as record number, removing the need for users to re-type information; saving time and reducing the chance of errors.

2. A Microsoft Power BI Advanced licence (Office365 licence item) is required for each user accessing the reports. (A free trial of Power BI Advanced is available for 12 months)



**Document capture** - Content sourced or generated outside of Content Manager can be easily uploaded to the task form, and seamlessly captured into Content Manager.

**Attaching supporting information** - Information that is already stored in Content Manager is easily linked to the business process allowing users to re-use and leverage content they already have.

**Perform incorporated into Content Manager Desktop** - Perform is integrated with the Content Manager Desktop interface using the standard external links functionality and provides users the ability to start a workflow on a Content Manager record either using the right click mouse menu or the ribbon.

**Metadata synchronisation** - Each time a task is completed metadata is synchronised between Perform and Content Manager allowing users to view the progress of the business process from either Perform or Content Manager.

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## ABOUT OBJECTIVE CORPORATION

Objective creates information and process governance solutions that are effortless to use and enable organisations to confidently advance their own digital transformation.

Designed for regulated industries, these solutions turn the imperative of compliance, accountability and governance into an opportunity to streamline business processes and deliver the innovative services that customers expect.

With a heritage in Enterprise Content Management (ECM), Objective's expanded solutions extend governance across the spectrum of the modern workplace; underpinning information, processes and collaborative work-spaces.

Through a brilliant user experience, people access the information they need to progress processes from wherever they choose to work.

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