

# **PayDox**

## **Adaptive Case Management**

<http://www.paydox.com>

### PayDox applications

**ADAPTIVE  
CASE  
MANAGEMENT**

**BUSINESS  
PROCESS  
MANAGEMENT**

**All features can be used independently**

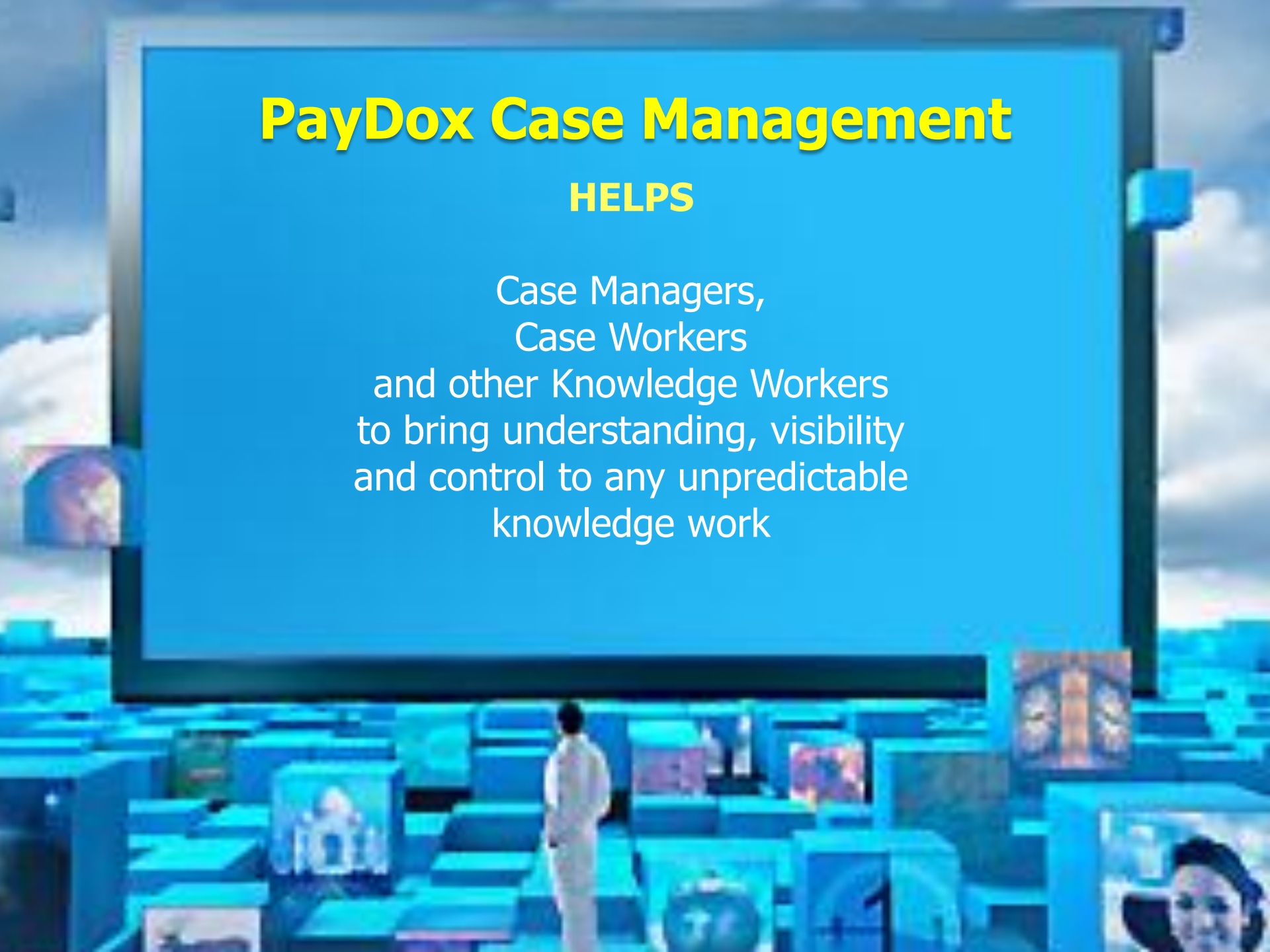
**FILE  
CATALOGUE  
MANAGEMENT**

**RECORDS  
MANAGEMENT**

# **PayDox Case Management**

## **HELPS**

Case Managers,  
Case Workers  
and other Knowledge Workers  
to bring understanding, visibility  
and control to any unpredictable  
knowledge work



# Use **PayDox Case Management**

for any corporate project management  
& social or agile business process management  
that requires collaboration, negotiation  
and document reconciliation





# PayDox Case Management

- ✓ Can be downloaded and installed in minutes
- ✓ Lets you automate enterprise business processes without any laborious initial settings and without any programming

# PayDox Case Management

## LETS YOU:

- ✓ Create cases – sequences of tasks and messages containing:
  - to-do lists, tasks, assignments
  - user discussions
  - addressees and viewers
  - execution periods
  - documents, photos, videos
  - data tags and forms
  - business rules

Firefox

PayDox Case Management

127.0.0.1/ShowMessagesScreen.asp?pars=\*open&expandall=y&wrap=y&l=

# PayDox

Cases

Rachel Foss  
IT

Cases / Messages

- Not seen
- For me
- Response required
- Responded
- Created by me
- Reconciliations
- Open
- Milestones
- Events
- Deals
- Expired
- Expiring
- Short-list
- Informational
- Informational / All
- Last entered
- Your control
- All


Accounts Receivable


Business processes

Human Resources


Common


New employees

 + ! Rachel Foss MFC4 >>>

▶ Mike, did you see new applicant CV received by e-mail? 


Human Resources


 + ! Rachel Foss 2443 >>>


▶ Tom Smith job application. Position: Sales Representative 

Human Resources


New employees

 ! Rachel Foss

▶ Job application approval 

 + ! Rachel Foss

▶ Employment contract signing.

Colleagues, please read and reconcile the contract 





You can use your iPad  
to access PayDox



# **PayDox Case Management**

## **core functionality**

### How to log in to the system

Firefox

PayDox Case Management

127.0.0.1/ShowMessagesScreen.asp?l=&ApplicationType=-

**PayDox**  
Case Management

Cases/Messages

Directories

Configuration

Links

Actions

Login

Accounts Receivable

Business processes

HelpDesk

Human Resources

Loans

Meetings

Procurement

After the installation process the system starts in a web-browser at the url-address provided during the installation process, for example, **http://127.0.0.1**

The system starts also by clicking the desktop icon or entering the IP-address in the browser.

Unauthorized users can log in to the system under the **PUBLIC** login.

Public users can register themselves in the system

To enter the system as an Administrator please provide login **Admin** and password **Admin**.

The password can be changed in the system **Users** directory.

# How to start using PayDox Case Management

**PayDox**  
Case Management

**Cases / Messages**

- Open
- Directories
- Configuration
- Cases**
  - Cases
  - Business processes
  - Catalogue
  - HelpDesk
  - Document Management

Accounts Receivable  
Business processes  
Human Resources  
Common  
New employees

Users can see all their projects, tasks, messages, files, questions and answers on the single screen

Select the configuration «**Cases**» to activate Case Management features only and to switch off all the rest PayDox features

Human Resources

Tom Smith job application. Position: Sales Representative

Job application approval

Employment contract signing.  
Colleagues, please read and reconcile the contract

Providing the contract copy to employee

All tasks, notifications, project descriptions and discussions can be presented as the sequences of messages typed in the required order. Case messages can contain task descriptions, files, expiration dates, addressees and responsible person names

### PayDox ACM one screen features

The screenshot displays the PayDox ACM one screen interface. The top header shows the PayDox logo and the text "ADAPTIVE CASE & TASK MANAGEMENT (ACM)". The main title "PayDox ACM one screen features" is prominently displayed in a yellow banner.

The interface is divided into several sections:

- Left Sidebar (Cases / Messages):** Contains a list of filters and categories. Callouts include "Various filters" pointing to the filter icons, "Hierarchical case categories" pointing to the category list, and "Hierarchical case structure" pointing to the folder structure.
- Top Bar:** Shows the user's name "Demo User" and department "Demo Department". Callouts include "Hot buttons" pointing to the top navigation icons and "Various case viewers" pointing to the case viewer icons.
- Main Content Area:** Displays a list of cases. Callouts include:
  - "Case multimedia file folder" pointing to the folder icon in the case header.
  - "HTML-forms" pointing to the "FORM" button in the case header.
  - "Case data tags" pointing to the "HR Department" tag.
  - "To see the whole case in the separate window" pointing to the "2443" link.
  - "Attached files" pointing to the file icons in the case details.
  - "Action buttons" pointing to the "Agree" and "Refuse" buttons.
  - "Case status & quick menu" pointing to the status icons and menu in the case header.
  - "Case project team" pointing to the team photo in the case details.
  - "Case ID" pointing to the "3874" link.
  - "Quick response on the same screen" pointing to the "Agree" and "Refuse" buttons.

The interface also includes a search bar at the bottom left and a "Other users" section at the bottom.



### Tree (hierarchical) view

**PayDox**  
Cases

Cases/Messages  
Directories  
Configuration  
Cases  
Links  
Actions

**Loans**

**Mike Volley**  
Car loan application process

**Mike Volley**  
Confirmation of receipt of Application form

**Rachel Foss**  
Setting up an appointment with the applicant

**Mike Volley**  
Help in choosing the loan type and terms

**Rachel Foss**  
Supporting required documents collection & check

**Uri Schwartz**  
Approval of documents

**Mike Volley**  
Application form approval

**George RAM & HDD**  
**Sales**  
**Warehouse 2 (computers)**

**3874**

**Demo User**  
Demo Department

Users can create **cases** – hierarchical sequences of messages describing human tasks to execute and case milestones

Completed tasks marked by checks

Open (actual) tasks marked by explanation signs. Click this icon to change the task status

Inactive tasks marked by grey color

### Table view

Cases

Cases/Messages

Directories

Configuration

Cases

Links

Actions

Current events

▼ Status	Number	▼ To	Files	▼ Completion date ▼ Closing date	▼ From	Assignment / Message
	211T	Mike Volley  <Demo> Mike Toledano  <Mike> Matilda Cropp  <Matilda> Jeff Robinson  <Jeff> Rachel Foss  <Admin>			Mike Volley	▶ New Internet-banner for approval & some other files <div>Agree Refuse</div>

Human Resources

New employees

▼ Status	Number	▼ To	Files	▼ Completion date ▼ Closing date	▼ From	Assignment / Message
	MFC4	Mike Volley <Demo>			Rachel Foss	▶ Mike, did you see new applicant CV received by e-mail?
	2443	Jeff Robinson <Jeff> Lynda Smith <Lynda> Rachel Foss <Admin> Mike Volley <Demo>			Rachel Foss	▶ Tom Smith job application. Position: Sales Representative
		'All'			Rachel Foss	▶ Job application approval
		Mike Volley  <Demo> Rachel Foss <Admin> Jeff Robinson <Jeff>			Rachel Foss	▶ Employment contract signing. Colleagues, please read and reconcile the contract
		Kate Vicunia <Kate>			Rachel Foss	▶ Providing the contract copy to employee

# How to create the task / assignment or message

The screenshot displays the PayDox user interface. On the left is a vertical navigation menu with sections: **Cases** (containing Cases/Messages, Directories, Configuration, and a dropdown menu currently set to 'Cases'), **Links**, **Actions** (containing 'Create assignment', 'Create by pattern', 'Upload XML-description', 'Login', and 'Logout'), and **Logout**. On the right is a main workspace area. At the top of this area is a toolbar with several icons. Three icons in the toolbar (representing a message, an assignment, and a task) are highlighted with a red box. A yellow callout bubble points to these icons with the text: "Click the icon **Create task /assignment** or **Create message**". Below the toolbar is a list of folders: Accounts Receivable, Business processes, Current events, HelpDesk, Loans, Meetings, and Procurement. Another yellow callout bubble points to the 'Create by pattern' option in the 'Actions' menu with the text: "Or click the icon **Create case by pattern** to create case copying a group of messages from the pattern library". A third yellow callout bubble points to the 'Create assignment' and 'Create by pattern' options in the 'Actions' menu with the text: "Or click the menu item **Actions / Create assignment** or **Create by pattern**".

**PayDox**  
Cases

Cases/Messages

Directories

Configuration

Cases

Links

Actions

Create assignment

Create by pattern

Upload XML-description

Login

Logout

Accounts Receivable

Business processes

Current events

HelpDesk

Loans

Meetings

Procurement

Click the icon **Create task /assignment** or **Create message**

Or click the icon **Create case by pattern** to create case copying a group of messages from the pattern library

Or click the menu item **Actions / Create assignment** or **Create by pattern**

# How to create the task / assignment

The screenshot shows the 'Create task / assignment' form in the PayDox application. The interface includes a left sidebar with navigation links, a main form area with various input fields and buttons, and a bottom section for user selection and completion date.

**Callouts and their corresponding interface elements:**

- Enter the subject:** Points to the 'Subject / Activity type' field, which currently contains 'Sales'.
- Enter the text message:** Points to the large text area containing 'Order management'.
- Here you can add data-tags for easy search:** Points to the 'Data-tags' field, which currently contains 'Polar Star'.
- Select the message status:** Points to the 'Task / Assignment' status section, which includes radio buttons for 'Open', 'Suspended', and 'Inactive'.
- Select users to whom this message addressed from the Users directory. These users will receive e-mail notifications:** Points to the 'More' button and the list of users below it, including Mike Volley, Stacey Moss, Alex Sicorski, Sasha Destare, Stephen Brad, Toby Franks, Pamela Wolf, Uri Schwartz, and Xu Lee.
- To provide additional options (uploading files, controllers, http-link) push the button More:** Points to the 'More' button at the bottom left of the form.

**Other visible interface elements:**

- Left Sidebar:** Contains links for 'Cases/Messages', 'Reports', 'Directories', 'Configuration', 'Links', and 'Actions'.
- Form Fields:** 'Type' (set to 'Cases'), 'Status' (set to 'Open'), 'Completion date' (empty), and 'Save information' button.
- Bottom Section:** Includes a 'More' button and a list of users to be notified.



### How to create response message or dependent task

**PayDox**  
Cases

Demo User  
Demo Department

Cases/Messages  
Directories  
Configuration  
Cases

Links  
Actions

Sales

Mike Volley

Order management

Polar Star

1262


Mark  
Short-list  
Case milestone  
Catalogue  
Rules (0)  
Go  
Resp. message  
Message

Click the quick menu item  
**Resp. message**  
to create response message  
or dependent task /  
assignment on the next  
hierarchical level





Click the quick menu item  
**Message**  
to create the next message  
or task / assignment  
on the same hierarchical level.  
Use these buttons to create  
messages in the required order



# How to copy case to the pattern library

Users can store closed cases in the case pattern library


**PayDox**  
Cases

Cases/Messages  
Directories  
Configuration  
Cases  
Links  
Actions





Case / Assignment / Task

Subject/ Activity type	Sales
Message	Order management
Data-tags	 Polar Star
From	Mike Volley
To	*All*
Status	 Closed
Creation date / Activation date	05/14/2013 11:19
Closing date	05/31/2013 14:08
Additional information Response messages or dependent assignments	

Back  
Show all  
Resp. message  
Open  
Suspended  
Cancel  
Inactive  
Informational  
Response required  
Short-list  
Long-list  
Modify  
Re-set responsible  
Delete  
Delete all  
E-mail  
Mark  
**Pattern**  
Download XML-description  
Rules (0)  
Catalogue  
System log

Push the button **Pattern** in the case root message page to copy whole the case (all tasks of this case) to the Pattern library

# How to create a case from the pattern library

The screenshot displays the PayDox web application interface. On the left is a sidebar menu with categories: Cases, Directories, Patterns, Subjects, Users, Departments, Counterparties, and Access groups. Under 'Patterns', there are sub-items: Configuration, Links, Actions, Create assignment, Create by pattern (highlighted with a red box), Upload XML-description, Login, and Logout. The main content area shows three folders: 'New employees', 'Loans', and 'Sales'. Each folder contains a list of cases. Callouts provide instructions on how to create a case from the pattern library.

**PayDox Cases**

Cases/Messages  
Directories  
**Patterns**  
Subjects  
Users  
Departments  
Counterparties  
Access groups

Configuration  
Links  
Actions  
Create assignment  
**Create by pattern**  
Upload XML-description  
Login  
Logout

**Directories / Patterns or Actions / Create by pattern**

**Create this icon to create a case by the pattern from the pattern library**

**Create this icon to copy the branch of messages (the part of the case pattern) from the pattern library to the previously marked message**

**New employees**

Rachel Foss  
#Tom Smith# job application... position: #Sales Representative#

**Loans**

Mary Volley  
Car loan application process

**Sales**

Uri Schwartz  
Order management

### Case filtering & case access control

**PayDox**  
Cases

Cases / Messages

! e - ✓ x i

Not seen

For me

Response required

Responded

Created by me

Reconciliations

Open

Milestones

Events

Deals

Expired

Expiring

Short-list

Informational

Informational / All

Last entered

Your control

All

Search

Other users

For other user

From other user

Accounts Receivable

Mike Volley

Jeff, we are still waiting payment from Yonge @ Sheppard Computers

Jeff Robinson

Ok, I'll call them

Business processes

Current events

Human Resources

New employees

Rachel Foss

Mike, did you see new applicant CV received by e-mail?

Mike Volley

Yes, some of them are interesting...

Rachel Foss

Tom Smith job application. Position: Sales Representative

Users can see only the tasks and messages permitted to see for these users

«**For me**» – tasks and messages addressed to the current user

«**Created by me**» – tasks and messages created by the current user

«**Open**» – actual tasks to execute. Complete and close these tasks

«**Response required**» – questions or problems requiring addressee's answer

«**Expired**» – open tasks having expired completion date

«**Informational**» – informational messages

«**Last entered**» – real-time view for new tasks and messages



### Multimedia catalogues

Multimedia catalogue allows to upload any number of documents and multimedia files into the case, to download and view documents, to play video and sound files, to view photos in a slide show mode, to create subdirectories, to create a description for files and directories

The screenshot displays the PayDox Multimedia Catalogue interface. On the left is a sidebar with navigation options: Cases/Messages, Directories, Configuration, Cases (selected), Links, and Actions. The top toolbar contains icons for communication, document management, and user actions. The main content area shows a case titled 'Rachel Foss' with a notification about a new internet banner. Below this, the 'Multimedia Catalogue' section is visible, featuring three sub-sections: Music, Photos, and Videos. The Music section contains two MP3 files: 'Concerto-grosso Allegro.mp3' and 'French accordeon.mp3'. The Photos section contains two images: 'good\_3383.jpg' and 'PayDoxAJAXBPM800x400.png'. The Videos section contains one video file: 'Shufutinski - White roses (Superstar 2008).flv'.

### Programmable rules

Programmable rules provide the possibility to set the execution order of the whole case. You can assign rules to automatically change assignment and task execution status depending on the status of other tasks, thus you can specify the sequence of execution of task for the whole case

The screenshot displays the PayDox user interface. On the left is a sidebar with navigation links: Cases/Messages, Directories, Configuration, Links, and Actions. The main area shows a 'Meetings' folder containing a list of tasks assigned to 'Rachel Foss'. The tasks are: 'The meeting of the m...', 'Preparation of the meeting agenda', 'Approval of the meeting agenda', 'Preparation of premises and equipm...', 'Meeting', 'Approval of the minutes of meeting', and 'Distribution of assignments of employees on the results of the meeting'. Each task has a status icon (plus, checkmark, warning, or error) and a 'Rules' icon. A yellow callout bubble points to the 'Rules' icon for the 'Preparation of the meeting agenda' task. A 'Firefox' window titled 'Rules' is open, showing a table of rules:

Code	Name
	Open all dependent messages if current message open
OAD	Open all dependent inactive messages if current message open
	Open next message if current message closed
CON	Open next inactive message if current message closed

At the bottom of the 'Rules' window is a 'Close window' button.

### How to create a case containing other cases

Human Resources

Common

Click the link icon to view remote case directly under the message containing the link to this remote case

Jeff Robinson

▶ Linda, what do you think about a new position for the Warehouse 1 (parts)?

Lynda Smith

▶ I think this is a nice idea!  
And look at the new banner...

<http://www.paydox.com/>

Rachel Foss

New Internet-banner for approval & some other...

BQR1

The PayDox Case Management lets you create cases containing other cases located on any other web-site powered by the PayDox Case Management.

This possibility to join various cases is useful

**to provide the interoperability between any communicating parties – contractors, business partners etc.**

## How to create a case containing other cases

Click the Case ID to open the whole case and provide this link in the HTTP-link field on the other PayDox Case Management web-site



# How to build PayDox ACM into your web-site

Case ID: KAQR462443

Search

  Rachel Foss

▶ Tom Smith job application. Position: Sales Representative

  Rachel Foss

▶ Job application approval

Amir Friedman

▶ Will be ready soon :)

 Patricia Stone

▶ Job record completion

    Rachel Foss

▶ Employment contract signing.


Colleagues, please read and reconcile the contract

 Rachel Foss

▶ Providing the contract copy to employee

Kate Vicunia

▶ In process ...

 Rachel Foss

▶ New employee: to view & sign contract

 Rachel Foss

▶ New employee: to view & sign corporate internal rules

Jeff Robinson

▶ OK, no objections, agreed

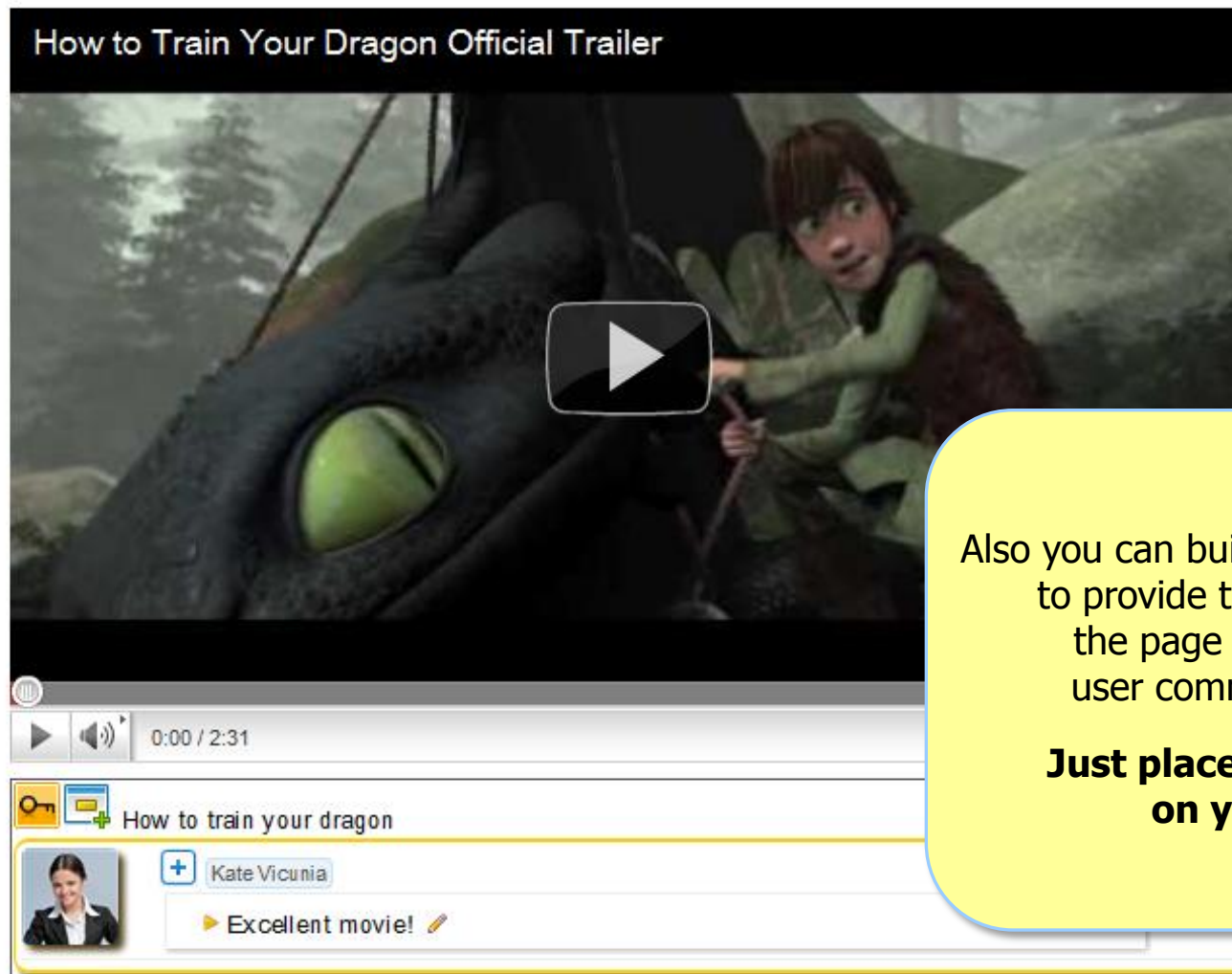
To get the order status information your customers have to input their case ID – please provide this case ID to your customers

You can build PayDox Case Management into your web-site to inform your customers, partners and applicants about their order, job application or other case status

**Just place a simple html-code on your web-page**

and your customers will track their order status on this web-page directly from your PayDox ACM installation


# How to build a case into your web-site



Also you can build a case into your web-site to provide the possibility to discuss the page materials or to public user comments and messages.

**Just place a simple html-code on your web-page!**

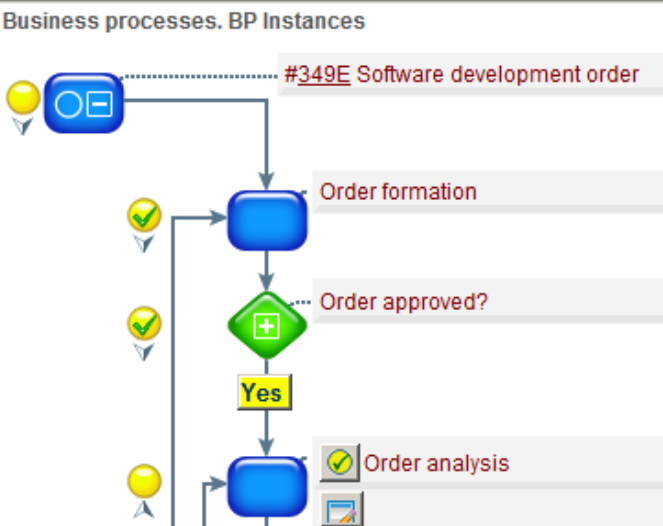
# Integration between ACM and BPM



Business processes

- Active
- Reports
- Directories
- Configuration
- Links
- Actions

Business processes. BP Instances



```


graph TD
    Start(( )) --> OF[Order formation]
    OF --> OA{Order approved?}
    OA -- Yes --> OR[Order analysis]
    
```

PayDox AJAX-BPM and PayDox ACM are tightly integrated. You can create cases inside any business process activity and you can easily link business processes from any case. Such tight integration provides agility and flexibility to the business process management functionality.


**Business Process Management + Adaptive Case & Task Management = Collaborative Business Process Management**

Activation date 05/18/2013 12:35


Cases / Messages



On specs section 1.3  
Standard subjects provided too long, please cut them to 255 symbols



On specs section 2.4  
Are these requirements for employees only or for management too?



For employees only - as specified in 2.4.7

# How to start using PayDox Case Management

The screenshot shows a Firefox browser window with the address bar displaying `127.0.0.1/ShowMessagesScreen.asp?pars=*open&expandall=y&wrap=y&l=`. The page title is "PayDox Case Management". The interface features a left sidebar with a "PayDox Cases" logo and a navigation menu including "Cases/Messages", "Directories", "Configuration", "Links", "Actions", and a "Login" button. The main content area displays a row of icons (calendar, briefcase, table, refresh, user, document) followed by a list of folders: "Accounts Receivable", "Business processes", "HelpDesk", "Human Resources", "Loans", "Meetings", "Procurement", and "Sales".

Use PayDox Case Management without any laborious initial settings and without any programming

Download PayDox Case Management, install it in minutes and use it on your computer for free



### Additional information

**FREE** fully functional version

**Download. Run.  
Works!**

**[www.PayDox.com](http://www.PayDox.com)**

