DFIN

Trust DFIN Workflow to Automate and Customize Your Project Management

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An integrated tool that strengthens collaboration and speeds up review cycles

With DFIN Workflow, you can automate and customize your project management. It integrates with ArcPro® and ArcReporting® to provide top-down visibility while streamlining your production and review cycles. Workflow enables you to route editing steps and documents to internal and external participants via email. As a customizable integrated workflow tool, you can update content; automate publishing; make, review, and consolidate electronic comments; distribute documents; and track production progress. Each workflow is designed to follow a predetermined path based on business rules you select as well as individual users or user groups.

How it works

When the workflow is initiated:

1. Email notices with links to the tasks and documents are sent to your preset users and approvers.

2. Users and approvers add their comments.

3. You are notified when they complete their tasks. Managers can review which task assignments have fallen behind schedule so they can follow up to ensure the overall timeline is met.

Workflow is designed to help businesses streamline and improve their processes by defining a logical flow of tasks and actions to complete a specific function.

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Benefits of Workflow

REPEATABLE

The workflow tool ensures work is handled consistently across all disciplines.

SCALABLE

It can handle increased workloads, growing product lines and new regulations.

TRACEABLE

An audit trail of actions taken within the system is instantly created. This provides management with oversight and reporting capabilities.

AUTOMATED

By reducing the number of manual tasks, it speeds up time to market to improve efficiency at your organization.

ACCOUNTABLE

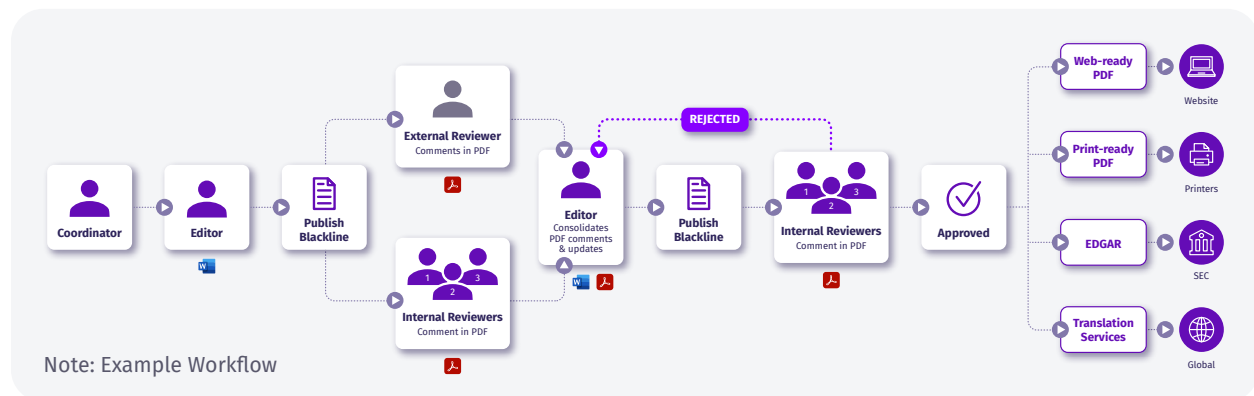You can assign process and content owners to ensure schedules are followed.

REDUCED RISK

Fewer review cycles lead to more accurate and consistent content.

Workflow module as part of Arc Suite®

The review process is efficient and collaborative. With Workflow, you can upload PDFs with comments, and consolidate all feedback into a single document. Because all comments are accessible within the system, the review process is simpler. You can also easily identify each user's comments so changes can be made faster and feedback tracked for future reference. All of this enhances the quality of the review process, empowers teams to collaborate, and leads to more accurate documents.

Workflow enables ArcPro and ArcReporting to streamline your proofing process across platforms and return proofs for further action. This helps enhance overall efficiency and further promotes collaboration.

Note: Example Workflow

Key features of Workflow integrated with Arc Suite

✔ **Forms** make it simple to initiate settings for a workflow, such as role assignments and important dates.

✔ **Team/People pickers** allow users to assign tasks to specific individuals or groups.

✔ **Automatic routing** ensures tasks are sent to the appropriate users for processing.

✔ **Notifications** alert users when tasks are assigned or workflows reach a certain point.

✔ **Tracking** lets users see the status of a workflow at any given spot.

✔ **Tasks** can be assigned during a workflow process, such as editing a content file or reviewing a publication.

✔ **Status page** shows information on current steps and the status.

✔ **Assignments** show active workflow tasks and provide alerts if they are late when assigned a due date. You can also reassign tasks to another user from this page.

✔ **Team** is a collection of users that can be selected on the Workflow form and sent a task. Think of this as a distribution list.

✔ **Binder** is a collection of documents that can be used by a binder workflow to run a collection of documents together.

✔ **Out of Office Proxy** is automatically assigned Workflow tasks when a user is unavailable to perform a task.

✔ **Conditional Logic** enables decisions that were previously determined by stakeholders to be made by the workflow, based on business rules that represent the human decisions.

Making a difference for clients

Workflow can make a significant improvement in on-time document approvals. For instance, before they started using Workflow, only 18% of documents were on time for one of our clients. After using Workflow for three months, on-time rates increased to 53%. After six months of using it, the client's **on-time document approval soared to 82%.**

**4X
INCREASE
in On-time
Document Approval**

Partner with DFIN to confidently automate and customize your project management

DFIN is the industry's most experienced provider of financial services technology and the largest filing agent in the U.S. Only DFIN has the expertise to develop a customized workflow that provides top-down visibility into your production cycles while relieving your organization of the work — saving you both time and money.

About Donnelley Financial Solutions (DFIN)

DFIN is a leading global risk and compliance company.

We're here to help you make smarter decisions with insightful technology, industry expertise and data insights at every stage of your business and investment lifecycles.

As markets fluctuate, regulations evolve and technology advances, we're there. And through it all, we deliver confidence with the right solutions in moments that matter.

Learn about DFIN's end-to-end risk and compliance solutions

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