



infoRouter Workflows

How to create a workflow definition
in infoRouter - Version 8.0.x

Active Innovations, Inc. A Document Management Company

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<http://www.inforouter.com>

Creating Workflows in infoRouter

The integrated **Workflow Management Software** built into infoRouter will help you manage your documents and business processes more effectively than ever.

This powerful software will allow you to create complex workflow scenarios to streamline your business processes. You will be able to automate a business process, where a generated document will be passed from one user to the other via email notifications and task assignments. Each user(s) in the path of the defined workflow will be able to perform a variety of tasks such as review a document, edit attached documents, add attachments and much more before passing the buck to the next person or persons in the path.

You may create recurring workflows for ISO Document Control or SOX reviews for regulatory compliance purposes where documents are passed around automatically and are reviewed by the defined users until the document is either rejected or approved. Users with appropriate access can track these documents and their current workflow statuses.

Requirements:

The workflow functionality is built-in so nothing has to be done to activate this feature. The System Administrator (sysadmin) or the Library Manager can create workflows.

Select a library. Workflows are library specific

infoRouter Demo Portal
Welcome to the infoRouter demo portal

Search:

Home | Document Library | Categories | Search | John Smith | My Tasks | Control Panel | Help | Logout | My Profile

New | Edit | Tools | View | Show filters

Invoice Processing

<input type="checkbox"/>	Name	Size	Format
<input type="checkbox"/>	Approved Invoices <i>Description: This folder contains all approved invoices</i>		Folder
<input type="checkbox"/>	Marked for Payment <i>Description: Marked for payment, pending manager approval</i>		Folder
<input type="checkbox"/>	Pending Invoices <i>Description: This folder contains all invoices pending for processing</i>		Folder
<input type="checkbox"/>	1001918_80146000.pdf <i>Description: ACME invoice for delivery services</i>	56 KB	Office Document
<input type="checkbox"/>	1003108_FKMBT_C252081125174628.pdf <i>Description: Acme invoice for storage services</i>	49 KB	Office Document
<input type="checkbox"/>	1004544_2008-12-08_0018.pdf <i>Description: Century Invoice HOLD. Do not process!!!</i>	50 KB	Office Document

1 - 9 | Total Item Count :9 | Folder count :3 | Document count :6

Choose “Workflow definitions” from the tools menu

The screenshot displays the 'infoRouter Demo Portal' interface. At the top, there is a search bar and navigation links: Home, Document Library, Categories, Search, John Smith, My Tasks, Control Panel, Help, Logout, and My Profile. The left sidebar shows a tree view of 'Document Libraries' with folders like Accounting, Collateral (Public Access), Corporate, Engineering, Form Templates, Government Contracts, Government Proposals, Human Resources, Invoice Processing (highlighted), Approved Invoices, Marked for Payment, Pending Invoices, ISO 9000 Procedures, News and Announcements, and Public.

The main content area shows a folder named 'Invoice Processing' with a 'Tools' menu open. The 'Tools' menu includes options: Folder properties, Folder security, Workflow definitions (highlighted with a mouse cursor), Send to, Send to workflow, Create task, Import, Export, and Client Add-ins / Programs. A tooltip for 'Workflow definitions' reads: 'Click here to access the workflow definitions defined on this folder'.

Below the menu, a list of documents is shown:

Document Name	Size	Type
1001918_80146000.pdf Description: ACME invoice for delivery services	56 KB	Office Document
1003108_FKMBT_C252081125174628.pdf Description: Acme invoice for storage services	49 KB	Office Document
1004544_2008-12-08_0018.pdf	50 KB	Office Document

At the bottom, a status bar shows: 1 - 9, Total Item Count : 9, Folder count : 3, Document count : 6.

Click “New” to create a new workflow definition

The screenshot shows the 'infoRouter Demo Portal' interface. The top navigation bar includes 'Home', 'Document Library', 'Categories', 'Search', 'John Smith', 'My Tasks', 'Control Panel', 'Help', 'Logout', and 'My Profile'. A search box is located on the right. The main content area is titled 'Workflow definitions - Invoice Processing' and contains a table with two columns: 'Workflow name' and 'Active folder path'. The table lists two workflows: 'Document Quality' and 'Read Published Version', both with the folder path '\Invoice Processing'. On the left side, a blue sidebar contains a menu with 'New', 'Properties', 'Delete', and 'Workflow Steps'. The 'New' option is circled in red, and a red arrow points from the circle to the 'New' text.

infoRouter Demo Portal
Welcome to the infoRouter demo portal

Search:

Home Document Library Categories Search John Smith My Tasks Control Panel Help Logout My Profile

Workflow definitions - Invoice Processing [Help](#) [Back](#)

Workflow name	Active folder path
Document Quality	\Invoice Processing
Read Published Version	\Invoice Processing

New
Properties
Delete
Workflow Steps

Enter basic workflow information

The screenshot shows the 'infoRouter Demo Portal' interface. At the top, there is a search bar and a navigation menu with links for Home, Document Library, Categories, Search, John Smith, My Tasks, Control Panel, Help, Logout, and My Profile. The main content area is titled 'Workflow definition - New workflow name' and contains two input fields. The first field, labeled 'Workflow name', contains the text 'Invoice Review'. The second field, labeled 'Active folder path', contains the text 'Invoice Processing' and has a 'Select...' button to its right. Two red arrows are drawn on the page: one points to the 'Active folder path' label, and the other points to the 'Invoice Review' text in the first input field. An 'OK' button is located at the bottom right of the form area.

Enter a name for the new workflow. Notice that you can select an active path. The default is the entire library but you can select a specific folder.

The workflow has been created

The screenshot shows the 'infoRouter Demo Portal' interface. The main content area displays 'Workflow definitions - Invoice Processing' with a table of workflow entries. The 'Invoice Review' entry is highlighted with a red oval.

Workflow name	Active folder path
Document Quality	\Invoice Processing
Invoice Review	\Invoice Processing
Read Published Version	\Invoice Processing

Now you must create the steps.

Time for some definitions & rules

infoRouter workflows are organized in steps and tasks. Steps are used to organize tasks in logical groups.

Steps:

You may define multiple steps.

Each step may include one or more tasks.

If there are more than one tasks in a step, all tasks are started at the same time (parallel tasks).

A step does not end until all tasks in the step have been completed.

A new step does not get activated until the previous step ends.

Tasks:

A task may be assigned to one or more users

If more than one assignee exists for a given task you may specify the following:

All users must perform the task

or

One user is enough to complete the task

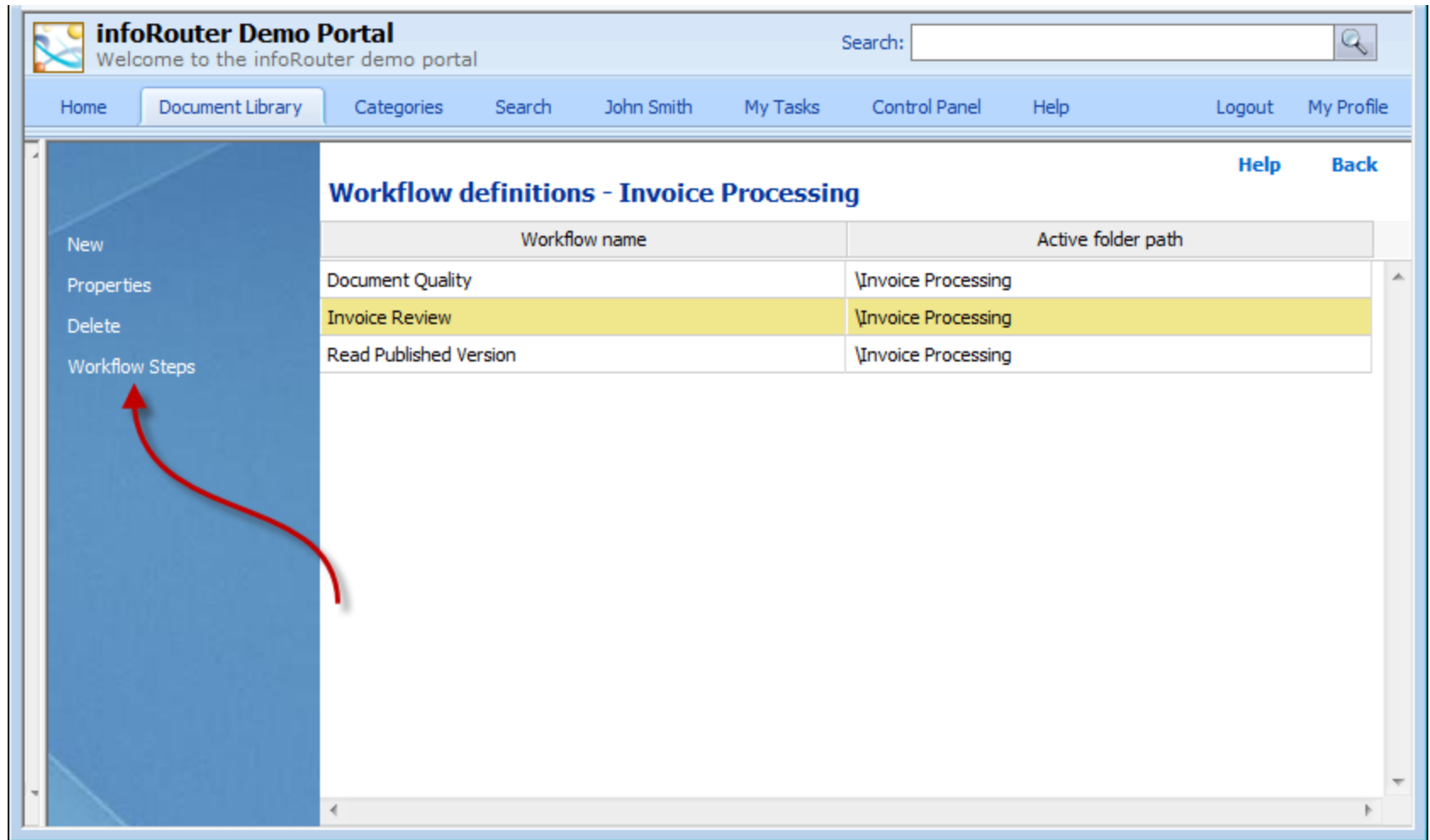
Tasks have requirements (things that must be done before a task can be completed)

Tasks have permissions (things an individual is permitted to do during the task)

Tasks have a deadline (hours, days etc.)

Now, let's see them!

Let's create a few steps



The screenshot shows the 'infoRouter Demo Portal' interface. The top navigation bar includes 'Home', 'Document Library', 'Categories', 'Search', 'John Smith', 'My Tasks', 'Control Panel', 'Help', 'Logout', and 'My Profile'. A search box is located on the right. The main content area is titled 'Workflow definitions - Invoice Processing' and contains a table with the following data:

Workflow name	Active folder path
Document Quality	\\Invoice Processing
Invoice Review	\\Invoice Processing
Read Published Version	\\Invoice Processing

In the left sidebar, there are links for 'New', 'Properties', 'Delete', and 'Workflow Steps'. A red arrow points to the 'Workflow Steps' link.

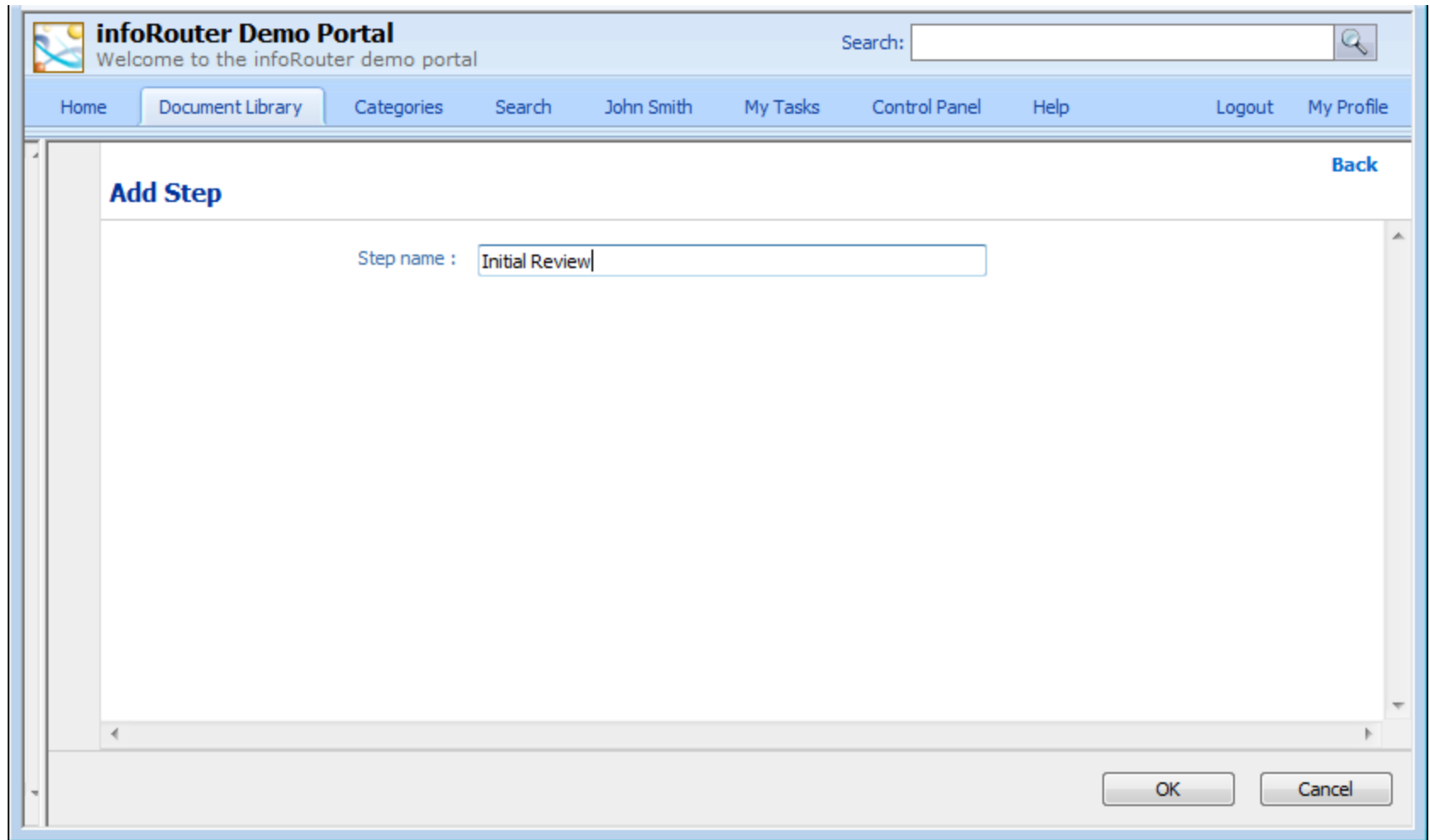
Click on the “Workflow steps” link to create a new step (or to view the ones that may exist)

Adding steps to an existing Workflow

The screenshot shows the 'infoRouter Demo Portal' interface. At the top, there is a search bar and a navigation menu with items like 'Home', 'Document Library', 'Categories', 'Search', 'John Smith', 'My Tasks', 'Control Panel', 'Help', 'Logout', and 'My Profile'. The main content area is titled 'Workflow Steps and Tasks - Invoice Review' and includes 'Help' and 'Back' links. Below the title is a table with columns for 'Task name', 'Priority', 'Deadline', 'Assign to', and 'Task rule'. On the left side, there is a blue sidebar menu with the following options: 'Add Step', 'Edit Step', 'Delete Step', 'Add Task', 'Edit Task', 'Delete Task', and 'Graphical View'. A red arrow points from the 'Add Step' link to the table area.

Click on the “Add Step” link to create a new step

Creating the step



The screenshot shows the 'infoRouter Demo Portal' interface. At the top, there is a search bar and a navigation menu with items: Home, Document Library, Categories, Search, John Smith, My Tasks, Control Panel, Help, Logout, and My Profile. The main content area is titled 'Add Step' and contains a form with a single input field labeled 'Step name :'. The text 'Initial Review' is entered into this field. A 'Back' link is located in the top right corner of the form area. At the bottom right of the form, there are two buttons: 'OK' and 'Cancel'.

Enter a name for the step and click “OK”. Repeat this for as many steps as you need.

Create as many steps as you need. What you are seeing is the fast-forwarded version with 4 steps. Time to create tasks.

The screenshot shows the 'infoRouter Demo Portal' interface. At the top, there is a search bar and a navigation menu with links for Home, Document Library, Categories, Search, John Smith, My Tasks, Control Panel, Help, Logout, and My Profile. The main content area is titled 'Workflow Steps and Tasks - Invoice Review' and includes 'Help' and 'Back' links. A table lists four steps in a workflow:

Task name	Priority	Deadline	Assign to	Task rule
1 - Initial Review				
2 - Supervisor Review				
3 - Manager Review				
4 - Payment processing A/P				

On the left side, a blue sidebar contains a menu with the following options: Add Step, Edit Step, Delete Step, Add Task, Edit Task, Delete Task, and Graphical View. A red arrow points from the 'Add Task' option to the table.

Now select a step and start adding tasks by clicking on the “Add Task” link

Task Definition window

Task Definition - Invoice Review - Step 1 - Help Back

Users

- Carolyn Kenny
- Dianna Finch
- Eugene Coleman
- John Smith
- Linda Harris
- Lyle Hill
- Mike Brown
- * AP Managers
- * AP Supervisors
- * Managers

Assign to

- * AP Clerks

Add Remove

If you choose not to assign this task to specific users, infoRouter will prompt for assignees at submission.

Step number : 1

Task name : Initial invoice review

Task rule : One user is enough to complete the task

Priority : Normal

Deadline : 1 Day(s) Hours

Allowed start time span : Day(s) Hours prior to due date

Task reminder : Day(s) Hours prior to due date

Task instructions : Please compare invoice to purchase order and check for the amounts. If purchase order has been issued for an amount equal to or higher than the invoice amount, pass the invoice along for further processing.

OK Cancel

Select from a list of library users or user groups to assign the task

Make sure that the user(s) or the user group(s) are given the appropriate security to perform their tasks (read, change etc.)

Write descriptive instructions on how the task must be carried out

Every task must have a deadline

Time-out!

More definitions & rules

Task Assignments:

A task may be assigned to users or user groups.

The user(s) in the user group at the time of task activation are assigned the task.

If there are more than one user in the group, the task is assigned to all users in the group.

Exception to the rule:

If the “One user is enough to perform the task” rule has been set, then infoRouter will pick one of the users and assign the task ONLY to that user.

Deadline:

Every task must have a deadline. This can be specified in days or hours.

The allowed start time span and reminder features can be used to control when the task can be performed. The reminder feature is performed via an email to the assignee.

Instructions:

All instructions must be clear for the task assignee.

Task Definition window (continued)

Task Definition - Invoice Review - Step 1 - Help Back

ORDER HAS BEEN ISSUED FOR AN AMOUNT EQUAL TO OR HIGHER THAN THE INVOICE AMOUNT, PASS THE INVOICE ALONG FOR FURTHER PROCESSING.

Supervisor :

Send notification to supervisor : Days after due date ▾

Task permissions :

<input type="checkbox"/> Edit document	<input type="checkbox"/> Postpone task
<input type="checkbox"/> Change task priority	<input type="checkbox"/> Change finish date
<input type="checkbox"/> Edit next step	<input type="checkbox"/> Edit all steps

Task requirements :

<input checked="" type="checkbox"/> Read	<input type="checkbox"/> Read published version
<input type="checkbox"/> Comments	<input checked="" type="checkbox"/> Approve/Reject decision
<input type="checkbox"/> ISO/Periodic review	<input type="checkbox"/> SOX Review
<input type="checkbox"/> Classification downgrade	<input type="checkbox"/> Declassification
<input type="checkbox"/> Edit	<input type="checkbox"/> Archive

Every task can have a supervisor. This is who we send complaints to when the task does not get done.

This is where you define what the assignees can do while they perform the task

This is where you define what the assignees are required to do while they perform the task.

If they do not do any one of these, they will not be able to complete the task

Permissions & Requirements

Permissions define what the assignee(s) CAN do.

whereas

Requirements define what the assignee(s) MUST/SHOULD do.

Permissions:

Edit:

As a general rule, documents that are in an active workflow cannot be checked out, even by authorized users. This setting allows task assignees to check out documents and make edits to those documents within their tasks. Note that assignees will need at least “Change” rights to check out a document.

Change task priority:

This allows the assignee to change the task priority

Edit next step:

This setting allows the assignee to alter the next step in the workflow.

Postpone task:

This setting allows the assignee to postpone the task.

Change finish date:

This setting allows the assignee to complete the task but enter a different finish date.

Edit all steps:

This setting allows the assignee to alter all steps in the workflow.

Permissions & Requirements

Requirements

Read:

This setting requires the assignee(s) to “Read” the document prior to completing their tasks.

Comments:

This requires the assignee(s) to enter comments prior to completing their tasks.

ISO/periodic review:

This requires the assignee(s) to enter ISO/periodic review comments prior to completing their tasks.

Classification downgrade:

This requires the assignee(s) to downgrade the document classification level prior to completing their tasks.

Edit :

This setting requires the assignee(s) to edit the document prior to completing their tasks.

Read Published Version:

This setting forces the assignee(s) to read the “published version” of the document prior to completing their tasks.

Approve/Reject decision:

This setting requires the user to make an Approve/Reject decision.

SOX Review:

This setting requires the assignee(s) to enter SOX comments prior to completing their tasks.

Declassification:

This requires the assignee(s) to declassify the document prior to completing their tasks.

Archive :

This requires the assignee(s) to archive the document prior to completing their tasks.

Note: All requirements are verified.

Example: If the user is required to “read” the document before the task can be completed, infoRouter makes sure that the user has read the document prior to allowing the completion of the task.

Here is how it looks after the first task has been defined

The screenshot shows the 'infoRouter Demo Portal' interface. The top navigation bar includes 'Home', 'Document Library', 'Categories', 'Search', 'John Smith', 'My Tasks', 'Control Panel', 'Help', 'Logout', and 'My Profile'. A search box is located on the right. The main content area is titled 'Workflow Steps and Tasks - Invoice Review' and features a table with columns for 'Task name', 'Priority', 'Deadline', 'Assign to', and 'Task rule'. The first step, '1 - Initial Review', contains a task named 'Initial invoice review' with a 'Normal' priority, a '1 Day(s)' deadline, and is assigned to '* AP Clerks'. The task rule is 'One user is enough to'. Below the table, 'Task Instructions' are provided: 'Please compare invoice to purchase order and check for the amounts. If purchase order has been issued for a amount equal to or higher than the invoice amount, pass the invoice along for further processing.' The workflow continues with steps '2 - Supervisor Review', '3 - Manager Review', and '4 - Payment processing A/P'. A left-hand sidebar offers actions like 'Add Step', 'Edit Step', 'Delete Step', 'Add Task', 'Edit Task', 'Delete Task', and 'Graphical View'.


	Task name	Priority	Deadline	Assign to	Task rule
1 - Initial Review					
	Initial invoice review	Normal	1 Day(s)	* AP Clerks	One user is enough to
Task Instructions: Please compare invoice to purchase order and check for the amounts. If purchase order has been issued for a amount equal to or higher than the invoice amount, pass the invoice along for further processing.					
2 - Supervisor Review					
3 - Manager Review					
4 - Payment processing A/P					

Every task in the step must be completed before the next step is activated. Now continue to add tasks (one or more) to each step to complete the workflow definition.

Here is how it looks after all the tasks have been defined and the workflow definition is complete. Now let's submit invoices to this workflow.

[Help](#)

Workflow Steps and Tasks - Invoice Review

	Task name	Priority	Deadline	Assign to	Task rule	Sup
1 - Initial Review						
	Initial invoice review	Normal	1 Day(s)	* AP Clerks	One user is enough to complete the task	John Smith

Task Instructions: Please compare invoice to purchase order and check for the amounts. If purchase order has been issued for an amount equal to or higher than the invoice amount, pass the invoice along for further processing.

2 - Supervisor Review

	Supervisor invoice check	Normal	1 Day(s)	* AP Supervisors	All users must complete the task	John Smith
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Task Instructions: Please check to make sure that the clerk has correctly approved the invoice for payment

3 - Manager Review

	Managers Review	Normal	3 Day(s)	* AP Managers	All users must complete the task	John Smith
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Task Instructions: Please check to make sure that the invoice can be paid for the next check run. Postpone the task if the invoice needs to wait for another check run period.

4 - Payment processing A/P

	Check processing	Normal	10 Day(s)	Bob Bishop, Carolyn Kenny, Dianna Finch	All users must complete the task	John Smith
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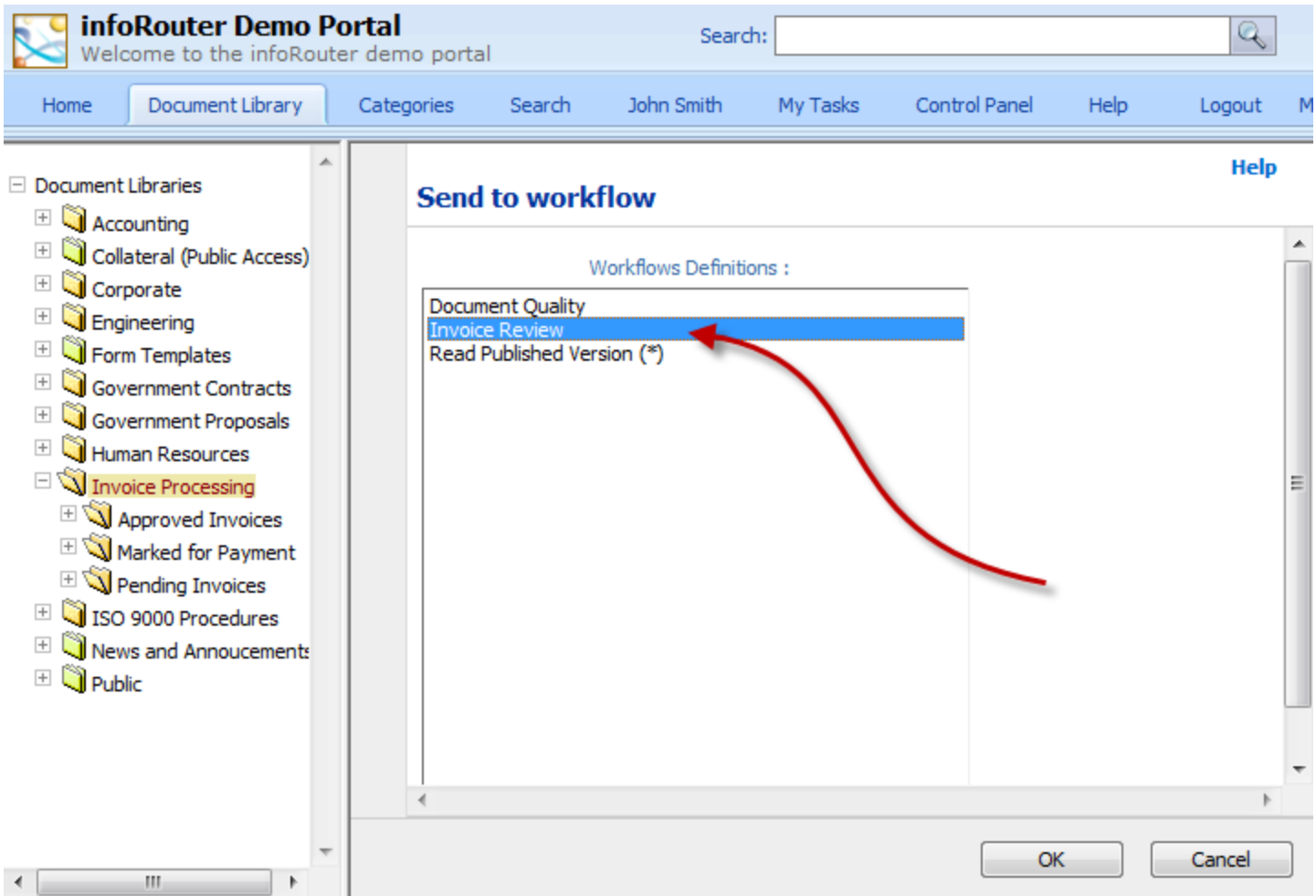
Task Instructions: Please process the attached invoice for check issuance.

Navigate to the document library and pick an invoice document to “send to workflow” using the pop-up menu

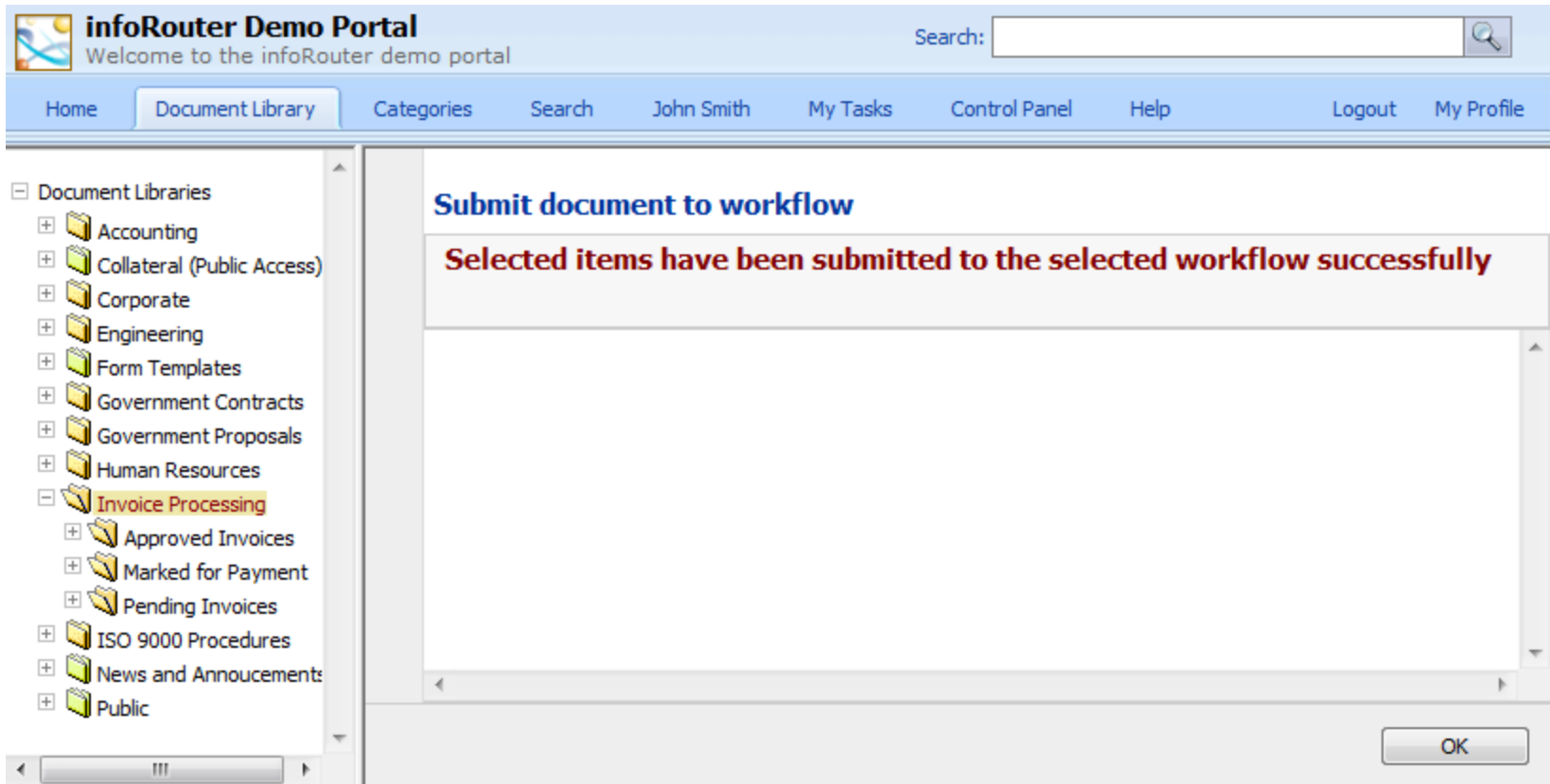
The screenshot displays a web-based document management system interface. The top navigation bar includes links for Home, Document Library, Categories, Search, John Smith, My Tasks, Control Panel, Help, Logout, and My Profile. The left sidebar shows a tree view of Document Libraries, with 'Invoice Processing' selected and expanded to show sub-folders like 'Approved Invoices', 'Marked for Payment', and 'Pending Invoices'. The main content area is titled 'Invoice Processing' and contains a table of documents. A context menu is open over the document '1001918_80146000.pdf', with the 'Send to workflow' option highlighted by a mouse cursor. The table columns are Name, Size, and Format. The document list includes folders and PDF files with descriptions.

	Name	Size	Format
<input type="checkbox"/>	Approved Invoices Description: This folder contains all approved invoices		Folder
<input type="checkbox"/>	Marked for Payment Description: Marked for payment, pending manager approval		Folder
<input type="checkbox"/>	Pending Invoices Description: This folder contains all invoices pending for processing		Folder
<input type="checkbox"/>	1001918_80146000.pdf Description: ACME invoice for delivery services		Document
<input type="checkbox"/>	1003108_FKMBT_C252081125174628.pdf Description: Acme invoice for storage services		Document
<input type="checkbox"/>	1004544_2008-12-08_0018.pdf Description: Centex invoice. HOLD. Do not process		Document
<input type="checkbox"/>	1015514_3_000008.pdf Description: Tribeca Logistics invoice for warehouse		Document
<input type="checkbox"/>	99830000.pdf Description: Theobold & Sons. invoice for sorting		Document

Select the workflow we just created and click ok.

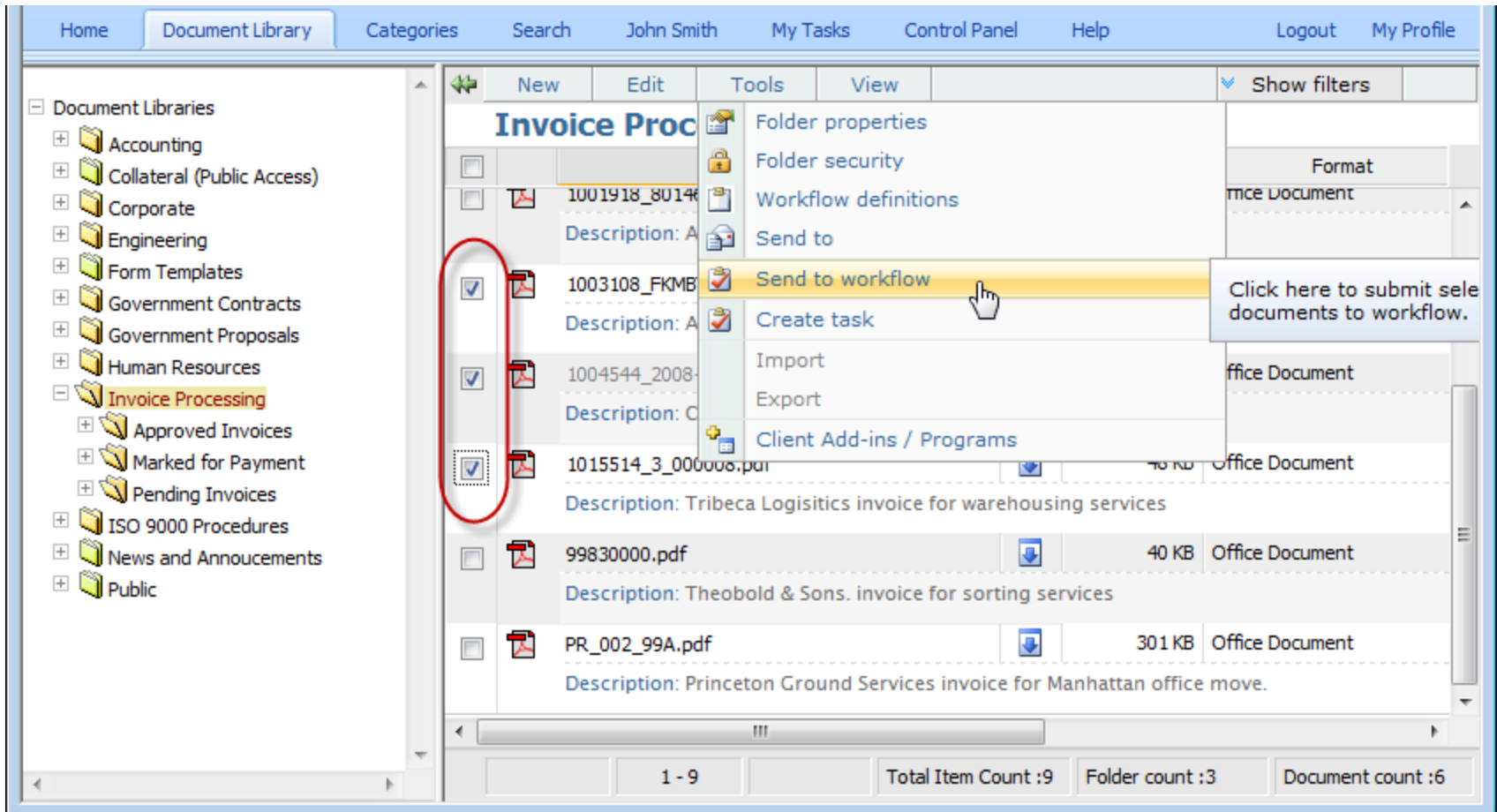


The document has now been submitted to the “Invoice Review” workflow.



You could have just as easily selected more than one invoice. Submission to workflow can be done for multiple documents.

Sending multiple documents to workflow



Select multiple documents and choose the “Send to workflow” menu from the tools menu.

Let's switch to the "Workflow Status" view mode to see some more detail.

The screenshot displays a document management system interface. The left sidebar shows a tree view of document libraries, with 'Invoice Processing' selected. The main content area shows a list of folders and documents under the 'Invoice Processing' view. A context menu is open over the 'Workflow status' option, which is highlighted in yellow. A tooltip points to this option with the text: 'Click here to view th with workflow status included.'

Name	Description	Size	File Type
Approved Invoices	Description: This folder co		
Marked for Payment	Description: Marked for pa		
Pending Invoices	Description: This folder co		
1001918_80146000.pdf	Description: ACME invoice		
1003108_FKMBT_C252081125174628.pdf	Description: Acme invoice for storage services	49 KB	Office Document
1004544_2008-12-08_0018.pdf	Description: Centex invoice. HOLD. Do not process!!!!	50 KB	Office Document
1015514_3_000008.pdf	Description: Tribeca Logisitics invoice for warehousing services	48 KB	Office Document

1 - 9 Total Item Count :9 Folder count :3 Document count :6

“Workflow Status” view mode.

Step	Task name	Task owner	Task status	Start Date	Due Date	Finished on
1 - Initial Review	Initial invoice review	Beverly Thompson	Pending	27 September 2010 12:34:32	28 September 2010 12:34:32	
2 - Supervisor Review	Supervisor invoice check	AP Supervisors	Not started			
3 - Manager Review	Managers Review	AP Managers	Not started			
4 - Payment processing A/P	Check processing	Bob Bishop Carolyn Kenny Dianna Finch	Not started			


The active step/task appears in green.

Notice that steps 2,3 and 4 have not been activated. Step 2 will wait for step 1 to finish, step 3 will wait for step 2 etc.

What happened in the background?

Beverly Thompson received an email from infoRouter indicating that she had been assigned a task. She then logged on to infoRouter and clicked on “My Tasks” to see the task.

The screenshot shows the 'infoRouter Demo Portal' interface. The navigation bar includes links for Home, Document Library, Categories, Search, Beverly Thompson, My Tasks (circled in red), Control Panel, Help, and Logout. Below the navigation bar, the 'My Tasks' section is displayed. It contains a table with the following data:

Action	Doc. Id	Document name	Priority	Task status	Due Date	Date assigned	Assignee
	2387	1001918_80146000.pdf	Normal	Pending	26 September 2010 15:37:12	25 September 2010 15:37:12	John Smith

The task details can be viewed by clicking here on the “Open task” button

The document (invoice) can be viewed by clicking here

The “Task” window

The screenshot shows a web application interface with a navigation bar at the top containing links for Home, Document Library, Categories, Search, Beverly Thompson, My Tasks, Control Panel, Help, Logout, and My Profile. The main content area is titled 'Task' and includes a 'Help' and 'Back' link. On the left side, a blue sidebar contains a list of actions: Complete task, Edit Comment, Add Attachment, Create associated task, Reassign to, Document Properties, and Show Workflow. A red rounded rectangle highlights this list, and a red arrow points from the text below to it. The main task details on the right include: Priority: Normal, Task status: Pending, Task result: (empty), Due Date: 26 September 2010 15:37:12, Workflow name: Invoice Review, Step name: Initial invoice review (1), Document: /Invoice Processing/1001918_80146000.pdf, Assigned by: John Smith, Assigned to: Beverly Thompson, and Supervisor: John Smith. Below these details is a 'Task Instructions' section with the text: 'Please compare invoice to purchase order and check for the amounts. If purchase order has been issued for an amount equal to or higher than the invoice amount, pass the invoice along for further processing.'

A list of things the assignee can do.

To complete the task, the assignee must perform all requirements.

See the [Permissions & Requirements section](#).

The “Task” window (continued)

Home Document Library Categories Search Beverly Thompson My Tasks Control Panel Help Logout My Profile

Help Back

Task

Task permissions

You may perform the following actions while processing this task

No specific permissions have been given for this task.

Task requirements

Read, Approve/Reject decision

Task Comment

OK

The assignee must first “read” the document then provide a decision.

“Approve” advances to the next step, “Reject” always ends the workflow.

Adding attachments



The screenshot displays a web application interface for task management. At the top, a navigation bar includes links for Home, Document Library, Categories, Search, Beverly Thompson, My Tasks (active), Control Panel, Help, Logout, and My Profile. Below this, a sidebar on the left contains several action links: Complete task, Edit Comment, Add Attachment (circled in red), Create associated task, Reassign to, Document Properties, and Show Workflow. A red arrow points from the 'Add Attachment' link to the task details area. The main content area, titled 'Task', shows the following information: Priority: Normal, Task status: Pending, Task result: (empty), Due Date: 26 September 2010 15:37:12, Workflow name: Invoice Review, Step name: Initial invoice review (1), Document: [/Invoice Processing/1001918_80146000.pdf](#), Assigned by: John Smith, Assigned to: Beverly Thompson, and Supervisor: John Smith. Below the task details, there is a section for 'Task Instructions' with the text: 'Please compare invoice to purchase order and check for the amounts. If purchase order has been issued for an amount equal to or higher than the invoice amount, pass the invoice along for further processing.'

The assignee may decide to attach a document to support the decision. The “Add attachment” link allows the assignee to attach documents.

Creating Associated Tasks (Ad-hoc tasks)

The screenshot shows a web application interface with a navigation bar at the top containing links for Home, Document Library, Categories, Search, Beverly Thompson, My Tasks, Control Panel, Help, Logout, and My Profile. Below the navigation bar is a sidebar on the left with a blue background, listing several actions: Complete task, Edit Comment, Add Attachment, Create associated task (highlighted with a red circle and an arrow), Reassign, Document Properties, and Show Workflow. The main content area is titled 'Task' and displays the following details:

- Priority : Normal
- Task status : Pending
- Task result :
- Due Date : 26 September 2010 15:37:12
- Workflow name : Invoice Review
- Step name : Initial invoice review (1)
- Document : [/Invoice Processing/1001918_80146000.pdf](#)
- Assigned by : John Smith
- Assigned to : Beverly Thompson
- Supervisor : John Smith

Below the task details is a section for 'Task Instructions' with the following text: 'Please compare invoice to purchase order and check for the amounts. If purchase order has been issued for an amount equal to or higher than the invoice amount, pass the invoice along for further processing.'

The assignee may also decide to create an associated task.

Example: Beverly may decide that additional information is needed to go forward. She could create a task for another user which requests this information.

The additional (ad-hoc) task becomes a part of the workflow definition for only this instance.

It does NOT alter the master definition.

Reassignments

The screenshot shows a web application interface with a navigation bar at the top containing links for Home, Document Library, Categories, Search, Beverly Thompson, My Tasks, Control Panel, Help, Logout, and My Profile. Below the navigation bar is a sidebar menu with options: Complete task, Edit Comment, Add Attachment, Create associated task, Reassign to (circled in red), Document Properties, and Show Workflow. A red arrow points from the 'Reassign to' link to the task details area. The task details area is titled 'Task' and includes the following information: Priority: Normal, Task status: Pending, Task result: (empty), Due Date: 26 September 2010 15:37:12, Workflow name: Invoice Review, Step name: Initial invoice review (1), Document: /Invoice Processing/1001918_80146000.pdf, Assigned by: John Smith, Assigned to: Beverly Thompson, Supervisor: John Smith, and Task Instructions: Please compare invoice to purchase order and check for the amounts. If purchase order has been issued for an amount equal to or higher than the invoice amount, pass the invoice along for further processing.

The assignee may decide that the assigned task would best be carried out by another user. The “reassign to” link does just that.

If you know you are going to be away on vacation, simply navigate to “My Profile” and assign your tasks to someone else and enter begin and end dates so all tasks you may be assigned during those dates are automatically routed to the designated user. Note: Your existing tasks stay with you.

Note: The “My profile” screen is located under the tab with your name on it.

Completing the “Task”

Here, Beverly decides to complete the task so she clicks the “Complete Task” link

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Help Back Close

Complete the Task

Task result : Approved

Task Comment : The invoice can be processed. The purchase order amounts match and the purchase order dates are valid.

OK Cancel

In this example, the assignee must choose between Approve and Reject and provide a reason before the task can be marked as “completed”

The task has been completed

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Task [Help](#) [Back](#)

Document Properties

Priority : Normal

Task status : Task completed

Task result : Approved

Due Date : 26 September 2010 15:37:12

Workflow name : Invoice Review

Step name : Initial invoice review (1)

Document : [/Invoice Processing/1001918_80146000.pdf](#)

Assigned by : John Smith

Assigned to : Beverly Thompson

Finished on : 25 September 2010 16:29:36

Supervisor : John Smith

Task Instructions :

Please compare invoice to purchase order and check for the amounts. If purchase order has been issued for an amount equal to or higher than the invoice amount, pass the invoice along for further processing.

OK

Workflow progression

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Invoice Processing

Name	Size	File type
Pending Invoices		Folder
1001918_80146000.pdf	56 KB	Office Document

Invoice Review

Step	Task name	Task owner	Task status	Start Date
1 - Initial Review	Initial invoice review	Beverly Thompson	Task completed / Approved	25 September 2010
2 - Supervisor Review	Supervisor invoice check	Dianna Finch	Pending	25 September 2010
2 - Supervisor Review	Supervisor invoice check	Carolyn Kenny	Pending	25 September 2010
2 - Supervisor Review	Supervisor invoice check	Bob Bishop	Pending	25 September 2010
3 - Manager Review	Managers Review	AP Managers	Not started	
4 - Payment processing A/P	Check processing	Bob Bishop Carolyn Kenny Dianna Finch	Not started	

Beverly has approved the invoice for further processing.

The second step in the workflow has been activated and the tasks have been assigned to the user group members.

Workflow progression

Step	Task name	Task owner	Task status	Start Date
1 - Initial Review	Initial invoice review	Beverly Thompson	Task completed / Approved	27 September 2010 12:00
2 - Supervisor Review	Supervisor invoice check	Dianna Finch	Pending	27 September 2010 12:00
2 - Supervisor Review	Supervisor invoice check	Carolyn Kenny	Task completed / Approved	27 September 2010 12:00
2 - Supervisor Review	Supervisor invoice check	Bob Bishop	Pending	27 September 2010 12:00
3 - Manager Review	Managers Review	AP Managers	Not started	
4 - Payment processing A/P	Check processing	Bob Bishop Carolyn Kenny Dianna Finch	Not started	

Notice that the 3rd step has not been activated. Dianna and Bob must complete their tasks before the workflow continues to step 3.

Carolyn has approved the invoice for further processing.

Remember, the task was configured to require “All users must perform the task”.

Workflow progression

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Invoice Processing

Name	Size	Forma		
1001918_80146000.pdf	56 KB	Office Document		
Invoice Review				
Step	Task name	Task owner	Task status	Start Date
1 - Initial Review	Initial invoice review	Beverly Thompson	Task completed / Approved	27 September 2010 12:00
2 - Supervisor Review	Supervisor invoice check	Dianna Finch	Pending	27 September 2010 12:00
2 - Supervisor Review	Supervisor invoice check	Carolyn Kenny	Task completed / Approved	27 September 2010 12:00
2 - Supervisor Review	Supervisor invoice check	Bob Bishop	Pending	27 September 2010 12:00
3 - Manager Review	Managers Review	AP Managers	Not started	
4 - Payment processing AP	Check processing	Bob Bishop Carolyn Kenny Dianna Finch	Not started	

1 - 9 Total Item Count :9 Folder count :3 Document count :6

Important Note:

The task has been designed to require an Approve/Reject decision.

If either Dianna or Bob chooses to “Reject” the invoice, the entire workflow will end, and an e-mail notice will be sent to the submitter.













If you do not wish to have a workflow end due to a reject decision, do not configure the task with the Approve/reject decision requirement.

An idea may be to collect comments until the very last step and have the last step decide on whether the invoice should be rejected.

Checking the status of pending Tasks & Workflows

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My Tasks

Action	Doc. Id	Document name	Priority	Task status	Due Date	Date assigned
	3406					
  	3406	1001918_80146000.pdf	Normal	Task completed / Approved	28 September 2010 12:34:32	27 September 2010 12:34
  	3406	1001918_80146000.pdf	Normal	Pending	28 September 2010 12:43:44	27 September 2010 12:43
  	3406	1001918_80146000.pdf	Normal	Task completed / Approved	28 September 2010 12:43:44	27 September 2010 12:43
  	3406	1001918_80146000.pdf	Normal	Pending	28 September 2010 12:43:44	27 September 2010 12:43

« ||| »

sk(s)

The image shows all tasks that were assigned by “John Smith”. By using the filters, you may filter out certain tasks.

Example: You may just wish to list those tasks that are “Overdue”.

The “My Tasks” screen

The screenshot shows the 'My Tasks' interface with a table of tasks. A context menu is open over the first row, which is highlighted in yellow. The menu options are: 'Open Task', 'Document Properties', 'Check out', 'Send to', 'Go to folder', and 'Delete Task'. A red arrow points to the 'Document Properties' option.

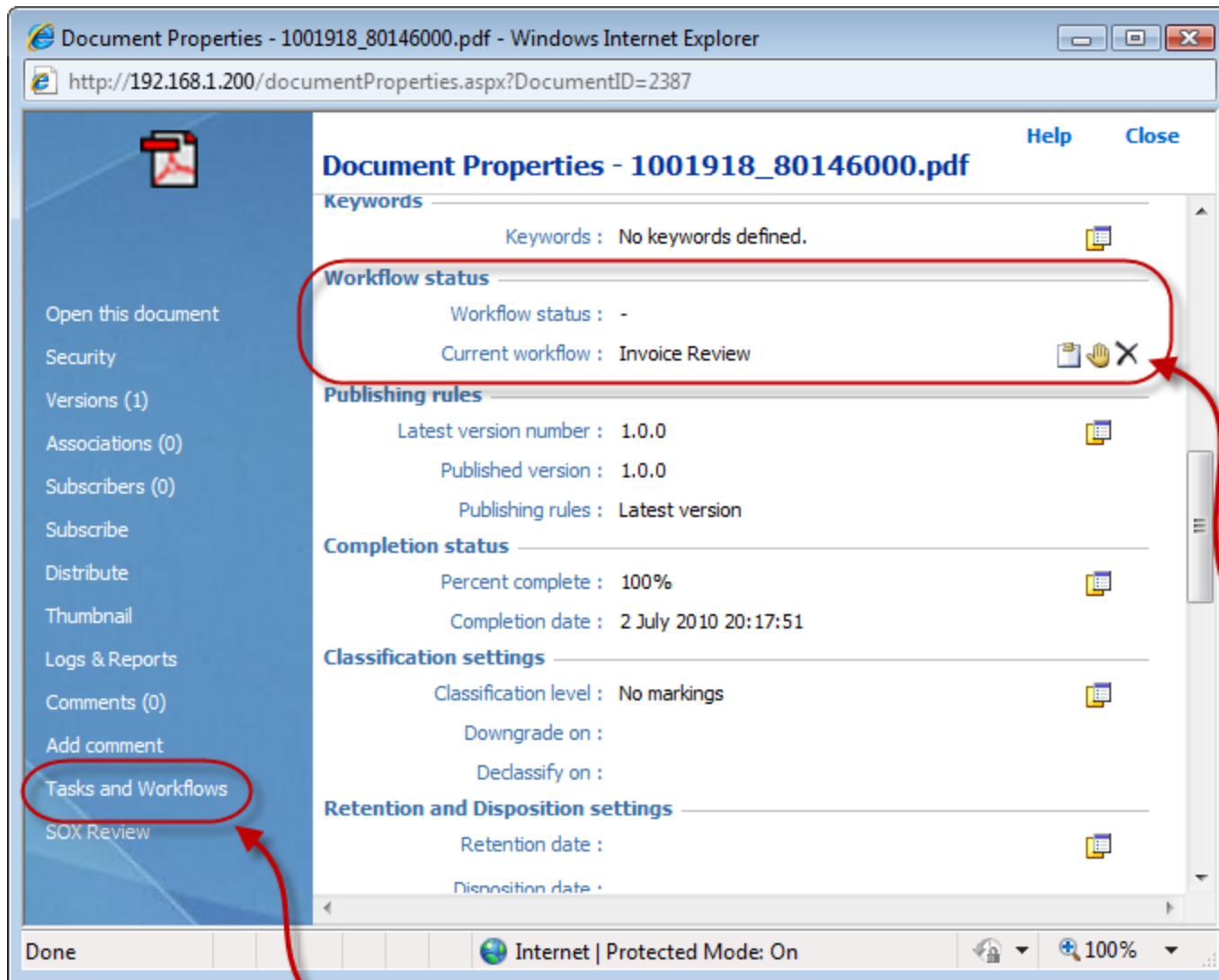
Action	Doc. Id	Document name	Priority	Task status	Due Date
		6000.pdf	Normal	Task completed / Approved	26 September 20
		6000.pdf	Normal	Pending	26 September 20
		6000.pdf	Normal	Pending	26 September 20
		6000.pdf	Normal	Pending	26 September 20
		T_C252081125174628.pdf	Normal	Pending	26 September 20
	3135	1004544_2008-12-03_0018.pdf	Normal	Pending	26 September 20
	2377	1015514_3_000008.pdf	Normal	Pending	26 September 20

7 Task(s)

The menu provides convenient links to task related screens.

Example: You may view the document properties or check out the document if the “task permissions” allow you to do so.

Accessing workflow information from the “document properties” window.



Authorized users may stop or delete the workflow assignment

All past/present tasks and workflows can be viewed by clicking here



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<http://forum.inforouter.com>