



infoRouter Workflows

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

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

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 in the top right corner. The left sidebar shows a tree view of 'Document Libraries' with 'Invoice Processing' selected and highlighted in red. The main content area displays the 'Invoice Processing' library contents in a table format. The table has columns for 'Name', 'Size', and 'Format'. The items listed are:

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

At the bottom of the interface, there is a summary bar showing '1 - 9', 'Total Item Count :9', 'Folder count :3', and 'Document count :6'.

Choose “Workflow definitions” from the tools menu

The screenshot displays 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 in the top right corner.

The main content area is divided into three sections:

- Left Panel (Document Libraries):** A tree view showing various folders. The 'Invoice Processing' folder is highlighted with a red border. Subfolders include 'Approved Invoices', 'Marked for Payment', 'Pending Invoices', 'ISO 9000 Procedures', 'News and Announcements', and 'Public'.
- Center Panel (File List):** A list of files and folders. The 'Approved Invoices' folder is selected. Below it, three PDF files are listed:

File Name	Size	Type
1001918_80146000.pdf	56 KB	Office Document
1003108_FKMBT_C252081125174628.pdf	49 KB	Office Document
1004544_2008-12-08_0018.pdf	50 KB	Office Document
- Right Panel (Tools Menu):** A context menu is open over the 'Approved Invoices' folder. The 'Workflow definitions' option is highlighted in yellow. A tooltip points to this option with the text: 'Click here to access the workflow definitions defined on this folder'. Other menu items include 'Folder properties', 'Folder security', 'Send to', 'Send to workflow', 'Create task', 'Import', 'Export', and 'Client Add-ins / Programs'.

At the bottom of the interface, a status bar shows '1 - 9', 'Total Item Count :9', 'Folder count :3', and '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 side of the top bar. 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 workflow definitions: 'Document Quality' and 'Read Published Version', both with an active folder path of '\\Invoice Processing'. On the left side of the main content area, there is a blue sidebar with a menu containing 'New', 'Properties', 'Delete', and 'Workflow Steps'. The 'New' button is circled in red, and a red arrow points from the circle to the 'New' button.

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 is titled 'Workflow definitions - Invoice Processing'. It 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

The 'Invoice Review' row is highlighted in yellow and circled with a red oval. The left sidebar contains navigation options: New, Properties, Delete, and Workflow Steps. 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 in the top right corner.

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

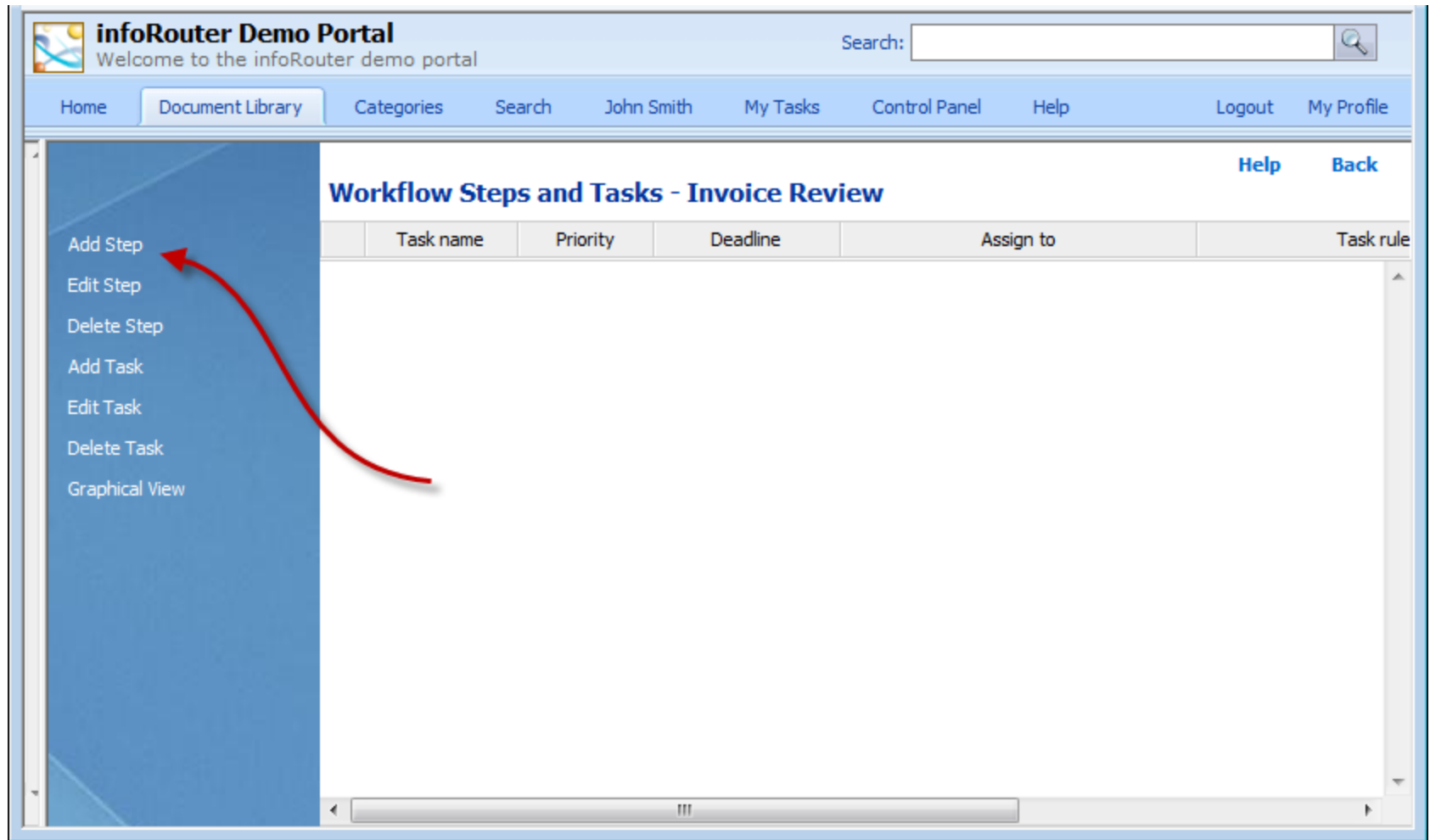
The screenshot shows the 'infoRouter Demo Portal' interface. The top navigation bar includes 'Home', 'Document Library', 'Categories', 'Search', 'John Smith', 'My Tasks', 'Control Panel', 'Help', 'Logout', and 'My Profile'. A search box is located on the right. The main content area is titled 'Workflow 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)

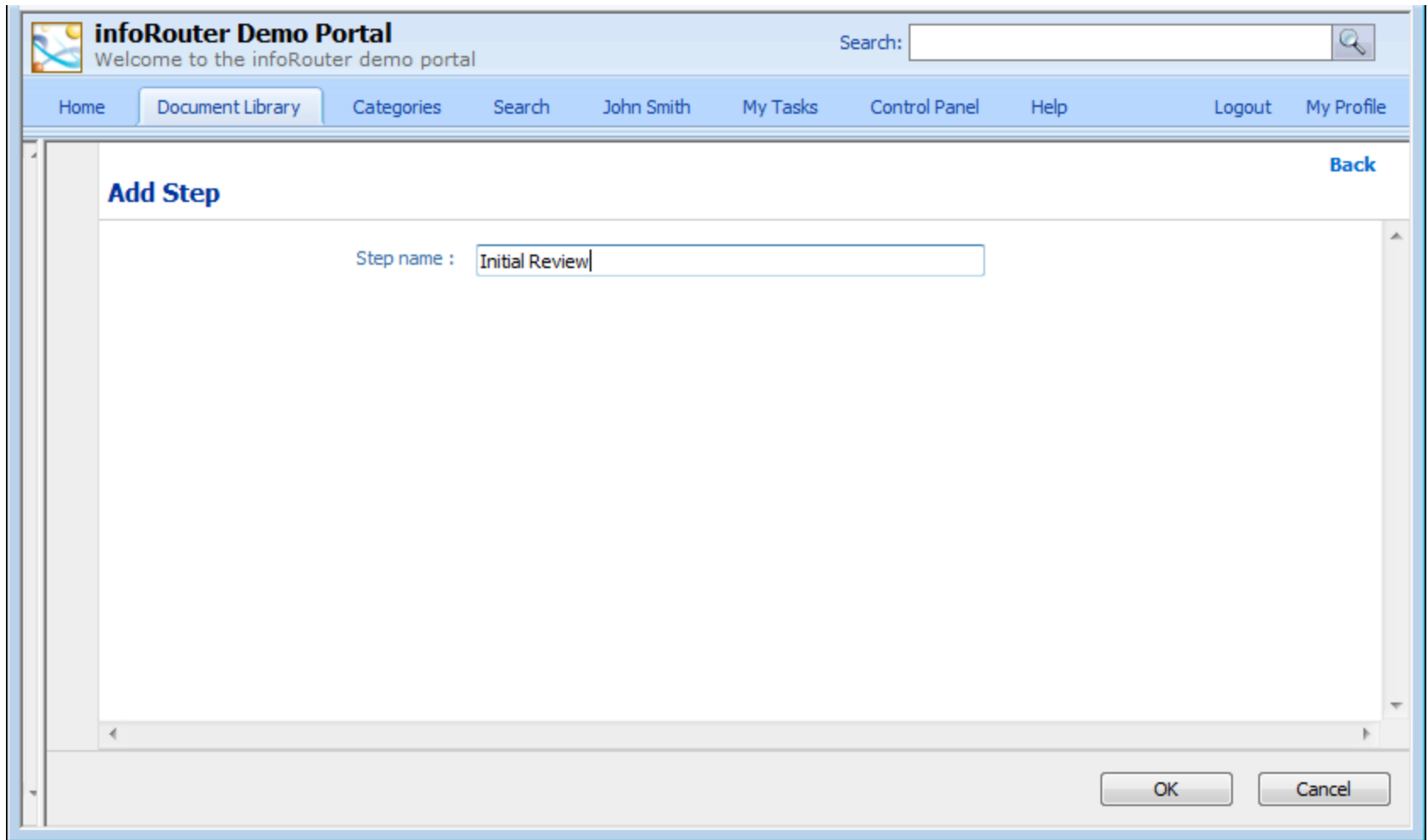
Adding steps to an existing Workflow



The screenshot shows the 'infoRouter Demo Portal' interface. At the top, there is a search bar and a navigation menu with 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. 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 in the sidebar 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 text input field labeled 'Step name :' with the text 'Initial Review' entered. A 'Back' link is located in the top right corner of the main area. At the bottom right, there are 'OK' and 'Cancel' buttons.

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 workflow steps:

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 :

Task rule :

Priority :

Deadline : 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 :

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

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 Steps and Tasks - Invoice Review [Help](#) [Back](#)

	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					


Left sidebar options: Add Step, Edit Step, Delete Step, Add Task, Edit Task, Delete Task, Graphical View

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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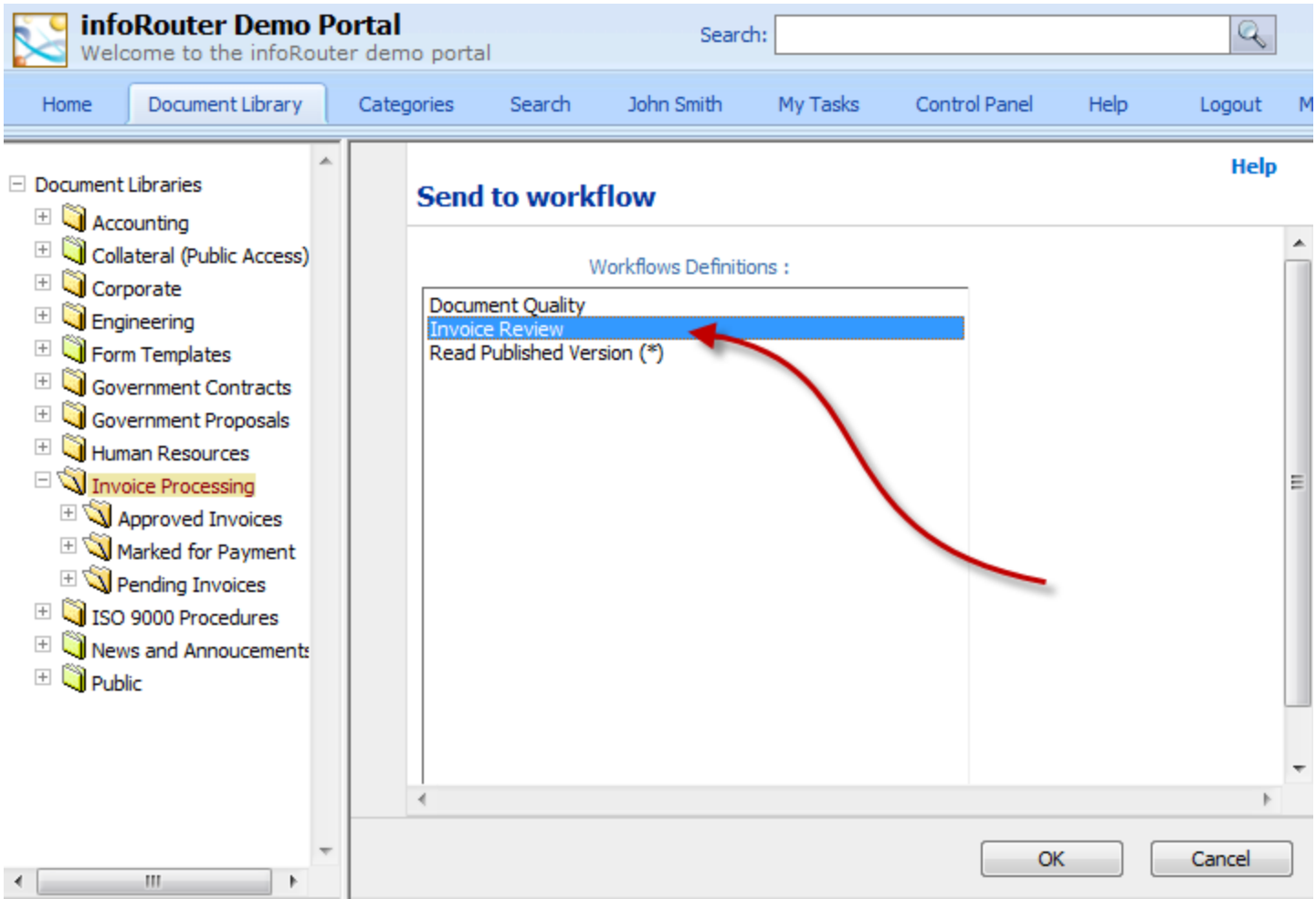
Task Instructions: Please process the attached invoice for check issuance.

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

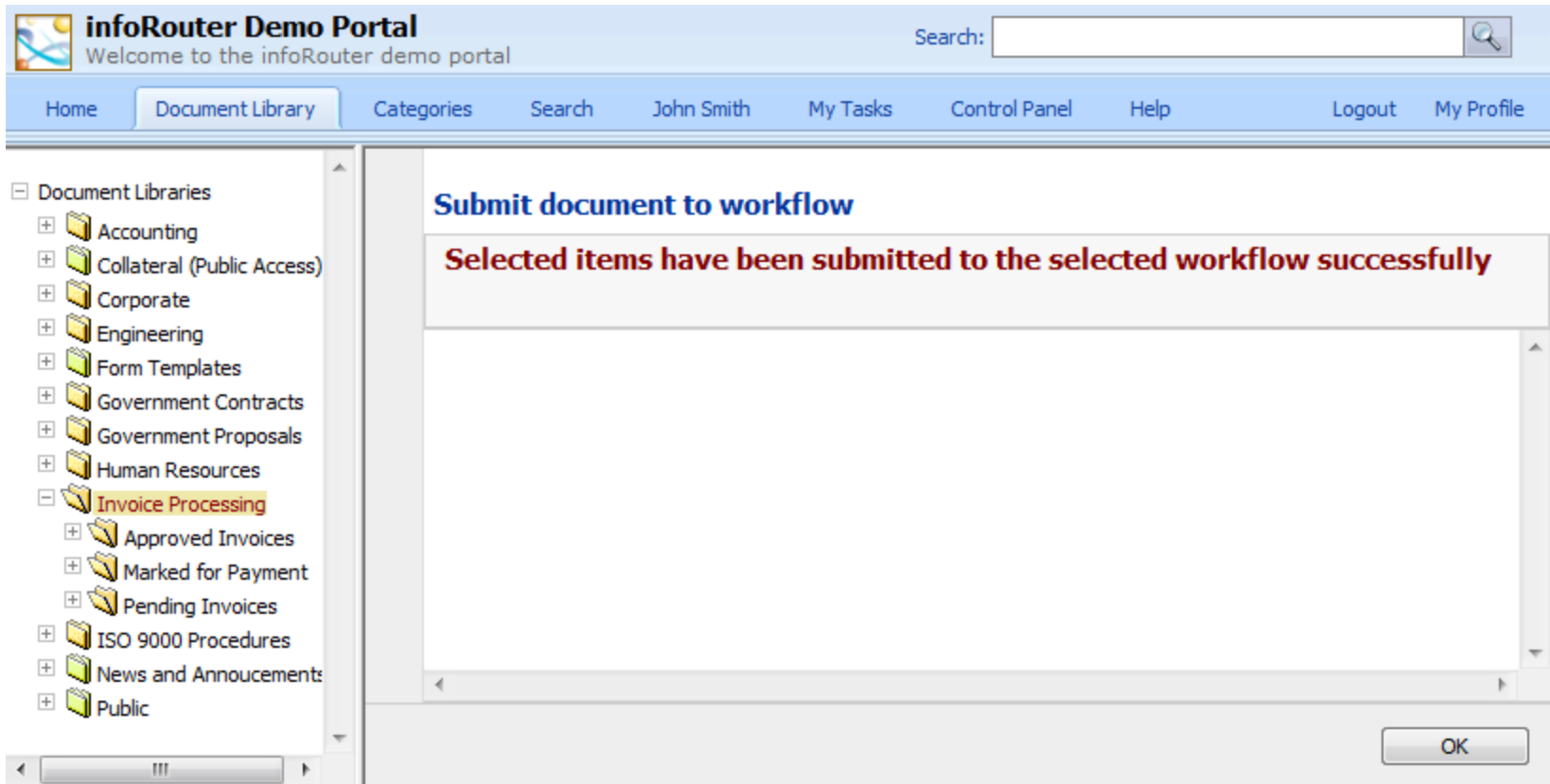
The screenshot displays a web-based document management system interface. The top navigation bar includes links for Home, Document Library, Categories, Search, John Smith, My Tasks, Control Panel, Help, Logout, and My Profile. The left sidebar shows a tree view of Document Libraries, with 'Invoice Processing' 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. The table has columns for Name, Size, and Format. A context menu is open over the document '1001918_80146000.pdf', listing actions such as Properties, Security, Cut, Copy, Delete, Check out, Set retention period, Set completion status, Send to, Comments, Add comment, Send to workflow, and Create task. The 'Send to workflow' option is highlighted, and a mouse cursor is pointing at it. The bottom status bar shows '1 - 9' and 'Total Item Count: 6'.

Name	Size	Format
Approved Invoices		Folder
Marked for Payment		Folder
Pending Invoices		Folder
1001918_80146000.pdf		Document
1003108_FKMBT_C252081125174628.pdf		Document
1004544_2008-12-08_0018.pdf		Document
1015514_3_000008.pdf		Document
99830000.pdf		Document

Select the workflow we just created and click ok.

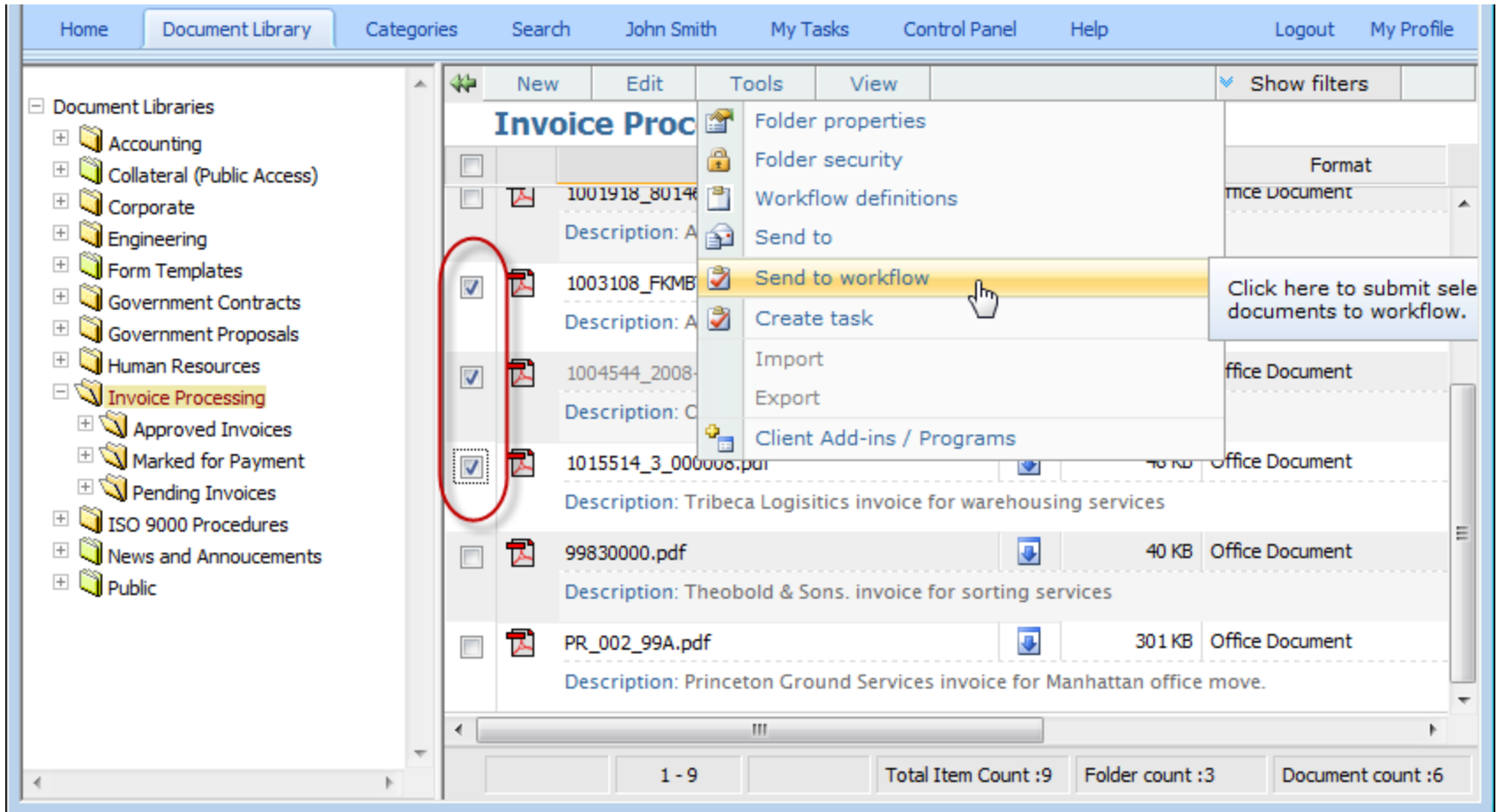


The document has now been submitted to the “Invoice Review” workflow.



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 shows a document management system interface. The left sidebar displays a tree view of document libraries, with 'Invoice Processing' selected. The main pane 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	File Name	Size	Document 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.

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

New Edit Tools View Show filters

Invoice Processing

Name	Size	Format	Modified
Pending Invoices		Folder	
1001918_80146000.pdf	56 KB	Office Document	27 September 2010 12:33:38

Invoice Review

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			

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


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, there is a blue sidebar with 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, 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.

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

Task Help Back

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 actions: Complete task, Edit Comment, Add Attachment, Create associated task (highlighted with a red circle), Reassign, Document Properties, and Show Workflow. A red arrow points from the 'Create associated task' option to the main content area. The main content area is titled 'Task' and displays 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. Below this information is a section for 'Task Instructions' with a text box containing the instruction: '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 with a blue background containing several menu items: 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 main content area. The main content area is titled 'Task' and displays the following details: 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. Below these details 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 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

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

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

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 'My Tasks' link is highlighted. Below the navigation bar, there is a 'Task' section with a 'Document Properties' sidebar on the left. The task details are as follows:

- 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.

An 'OK' button is located at the bottom right of the dialog.

Workflow progression

The screenshot displays a document management interface with a navigation menu on the left and a main content area. The 'Invoice Processing' folder is selected in the left sidebar. The main area shows a table of tasks for a specific invoice (1001918_80146000.pdf). The first task, '1 - Initial Review' by Beverly Thompson, is marked as 'Task completed / Approved'. The second task, '2 - Supervisor Review' by Dianna Finch, is highlighted in green, indicating it is the current active step. Subsequent tasks are also listed, including '2 - Supervisor Review' by Carolyn Kenny and Bob Bishop, '3 - Manager Review' by AP Managers, and '4 - Payment processing A/P' by Bob Bishop, Carolyn Kenny, and Dianna Finch.

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

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

New | Edit | Tools | View | Show filters

Invoice Processing

Name	Size	Format
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

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

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

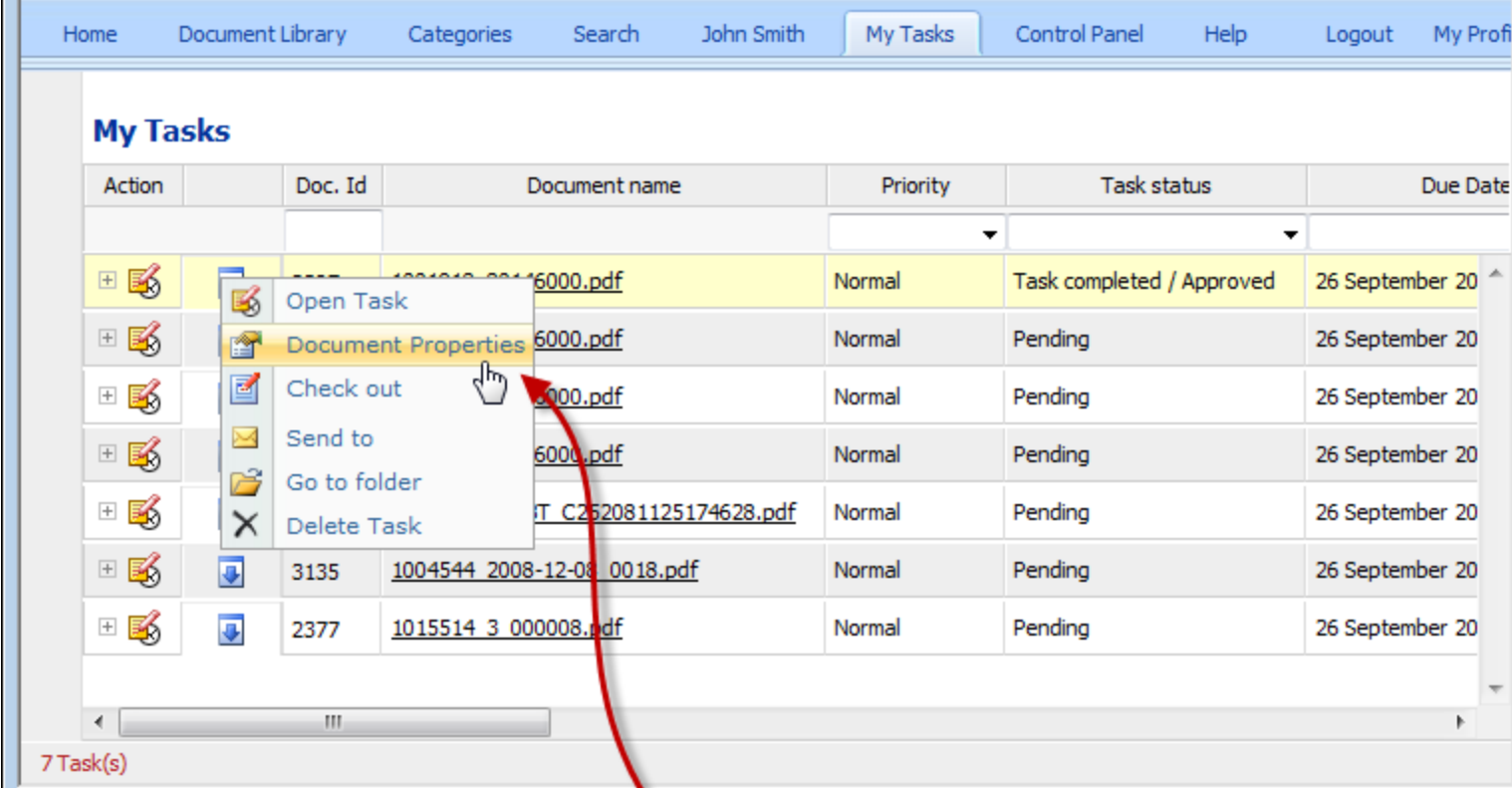
« ||| »

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 a web application interface with a navigation bar at the top containing links for Home, Document Library, Categories, Search, John Smith, My Tasks (selected), Control Panel, Help, Logout, and My Prof. Below the navigation bar is the 'My Tasks' section, which displays a table of tasks. A context menu is open over the first row of the table, showing options: Open Task, Document Properties, Check out, Send to, Go to folder, and Delete Task. A red arrow points from the 'Document Properties' option to the 'Check out' option. The table has columns for Action, Doc. Id, Document name, Priority, Task status, and Due Date. The first row is highlighted in yellow and shows a task with a status of 'Task completed / Approved' and a due date of '26 September 20'. The second row shows a task with a status of 'Pending' and a due date of '26 September 20'. The third row shows a task with a status of 'Pending' and a due date of '26 September 20'. The fourth row shows a task with a status of 'Pending' and a due date of '26 September 20'. The fifth row shows a task with a status of 'Pending' and a due date of '26 September 20'. The sixth row shows a task with a status of 'Pending' and a due date of '26 September 20'. The seventh row shows a task with a status of 'Pending' and a due date of '26 September 20'. At the bottom left of the screen, it says '7 Task(s)'. The table data is as follows:

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_2008-12-08_0018.pdf	Normal	Pending	26 September 20
[+]	2377	1015514_3_000008.pdf	Normal	Pending	26 September 20

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.

The screenshot shows a web browser window titled "Document Properties - 1001918_80146000.pdf - Windows Internet Explorer". The address bar shows the URL "http://192.168.1.200/documentProperties.aspx?DocumentID=2387". The main content area displays the following information:

- Keywords:** No keywords defined.
- Workflow status:** Workflow status: -, Current workflow: Invoice Review. This section is circled in red.
- Publishing rules:** Latest version number: 1.0.0, Published version: 1.0.0, Publishing rules: Latest version.
- Completion status:** Percent complete: 100%, Completion date: 2 July 2010 20:17:51.
- Classification settings:** Classification level: No markings, Downgrade on:, Declassify on:.
- Retention and Disposition settings:** Retention date:, Disposition date:.

A sidebar on the left contains the following menu items: "Open this document", "Security", "Versions (1)", "Associations (0)", "Subscribers (0)", "Subscribe", "Distribute", "Thumbnail", "Logs & Reports", "Comments (0)", "Add comment", "Tasks and Workflows" (circled in red), and "SOX Review". A red arrow points from the "Tasks and Workflows" menu item to the "Workflow status" section. Another red arrow points from the "Workflow status" section to the text on the right.

Authorized users may stop or delete the workflow assignment

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



infoRouter Workflows

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<http://forum.inforouter.com>