



# infoRouter Workflows

How the 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 displays the 'infoRouter Demo Portal' interface. The top navigation bar includes links for Home, Document Library (selected), Categories, Search, John Smith, My Tasks, Control Panel, Help, Logout, and My Profile. A search bar is located on the right. The left sidebar shows a tree view of Document Libraries, with 'Invoice Processing' highlighted. The main content area displays the 'Invoice Processing' library, showing a list of folders and documents. The list includes 'Approved Invoices', 'Marked for Payment', and 'Pending Invoices' (all folders), and three PDF documents: '1001918\_80146000.pdf', '1003108\_FKMBT\_C252081125174628.pdf', and '1004544\_2008-12-08\_0018.pdf'. Each item has a description and a download icon. The bottom status bar shows '1 - 9' items, a 'Total Item Count :9', 'Folder count :3', and 'Document count :6'.

**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

**Document Libraries**

- Accounting
- Collateral (Public Access)
- Corporate
- Engineering
- Form Templates
- Government Contracts
- Government Proposals
- Human Resources
- Invoice Processing**
  - Approved Invoices
  - Marked for Payment
  - Pending Invoices
- ISO 9000 Procedures
- News and Announcements
- Public

**Invoice Processing**

	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 Document</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. The top navigation bar includes links for Home, Document Library, Categories, Search, John Smith, My Tasks, Control Panel, Help, Logout, and My Profile. A search bar is located on the right. The left sidebar shows a tree view of Document Libraries, with 'Invoice Processing' highlighted. The main content area features a 'Tools' menu with 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' states: 'Click here to access the workflow definitions defined on this folder'. Below the menu, a list of documents is shown, including '1001918\_80146000.pdf', '1003108\_FKMBT\_C252081125174628.pdf', and '1004544\_2008-12-08\_0018.pdf'. The bottom status bar indicates '1 - 9', 'Total Item Count : 9', 'Folder count : 3', and 'Document count : 6'.

infoRouter Demo Portal  
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Document Libraries

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- Government Proposals
- Human Resources
- Invoice Processing**
  - Approved Invoices
  - Marked for Payment
  - Pending Invoices
- ISO 9000 Procedures
- News and Announcements
- Public

New Edit Tools View Show filters

**Invoice Proc**

- Folder properties
- Folder security
- Workflow definitions**
- Send to
- Send to workflow
- Create task
- Import
- Export
- Client Add-ins / Programs

Click here to access the workflow definitions defined on this folder

Approved Invoice  
Description: T

Marked for Pay  
Description: M

Pending Invoice  
Description: T

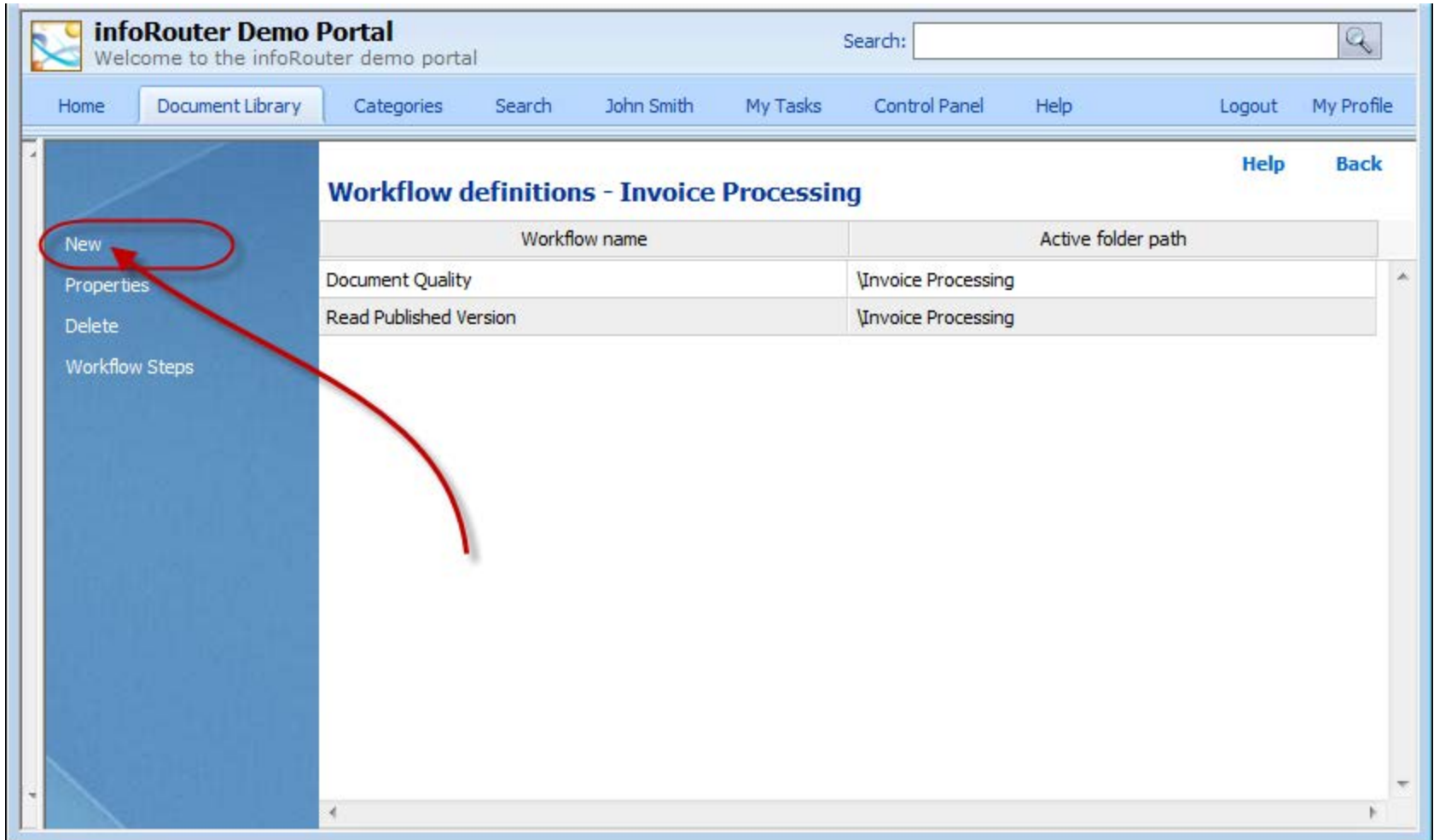
1001918\_80146000.pdf 56 KB Office Document  
Description: ACME invoice for delivery services

1003108\_FKMBT\_C252081125174628.pdf 49 KB Office Document  
Description: Acme invoice for storage services

1004544\_2008-12-08\_0018.pdf 50 KB Office Document

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 links for Home, Document Library, Categories, Search, John Smith, My Tasks, Control Panel, Help, Logout, and My Profile. A search bar 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 active folder path '\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 it towards the table.

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

**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

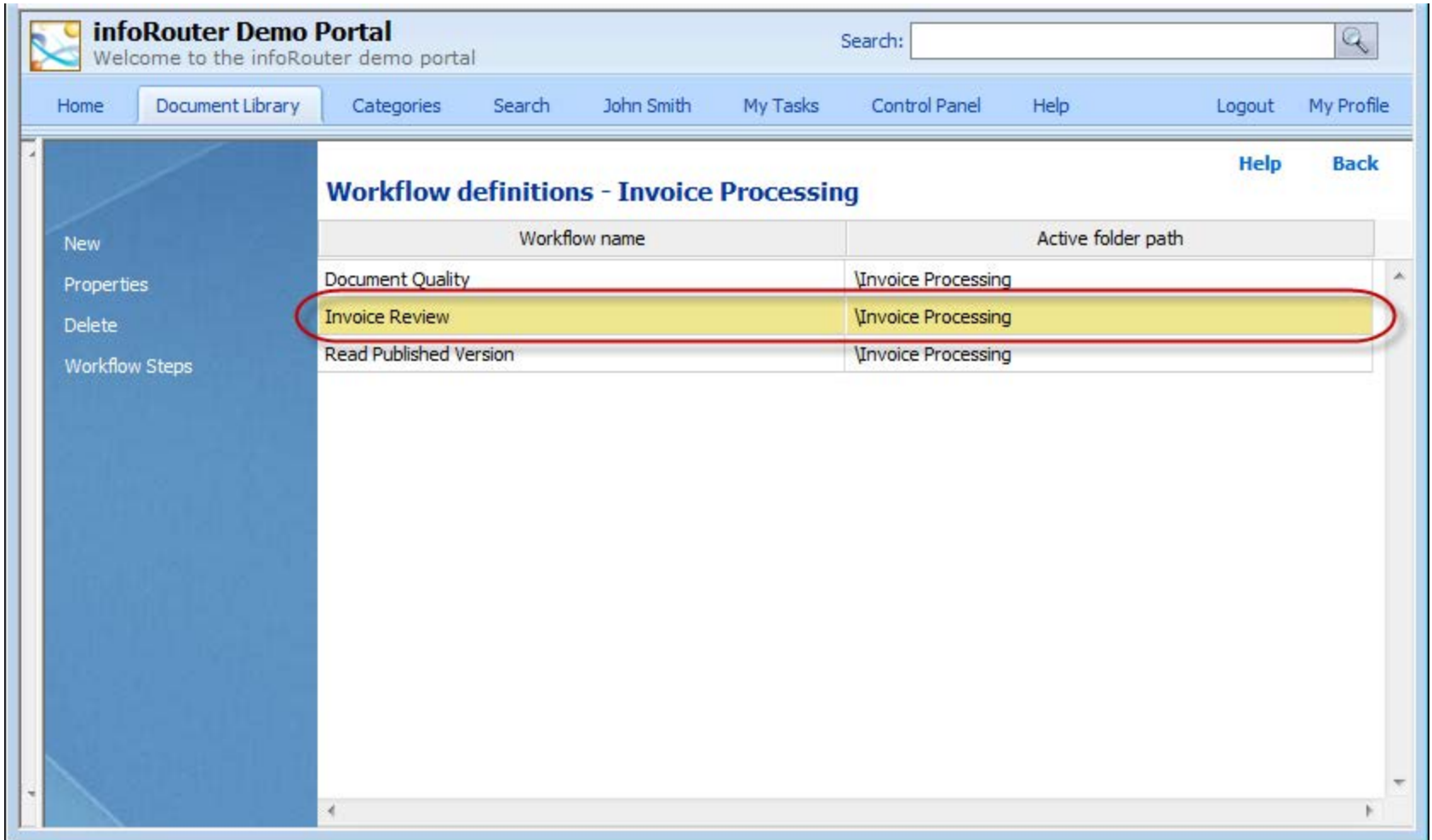
**Workflow definition - New workflow name** [Help](#) [Back](#)

Workflow name :

Active folder path :

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 displays the 'infoRouter Demo Portal' interface. The top navigation bar includes links for Home, Document Library, Categories, Search, John Smith, My Tasks, Control Panel, Help, Logout, and My Profile. A search bar is located on the right. The main content area is titled 'Workflow definitions - Invoice Processing' and features a table with two columns: 'Workflow name' and 'Active folder path'. The table lists three workflows: 'Document Quality', 'Invoice Review', and 'Read Published Version', all with the path '\\Invoice Processing'. The 'Invoice Review' row is highlighted in yellow and circled in red. A left sidebar contains links for New, Properties, Delete, and Workflow Steps. 'Help' and 'Back' links are also present in the top right of the main content area.

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)

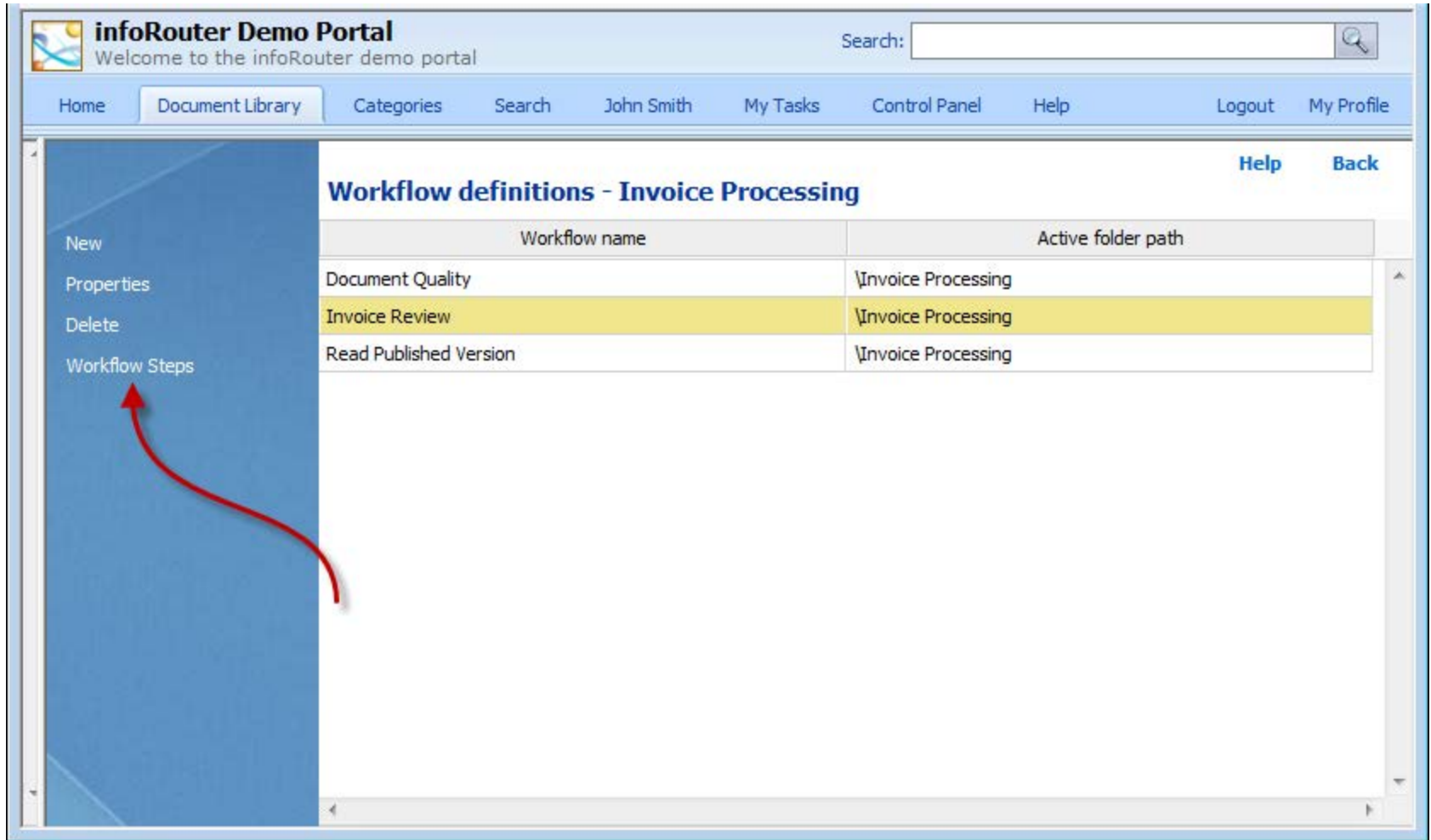
Tasks have permissions (things an individual is permitted to do during the task)

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 links for Home, Document Library, Categories, Search, John Smith, My Tasks, Control Panel, Help, Logout, and My Profile. A search bar 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 three workflows: 'Document Quality', 'Invoice Review', and 'Read Published Version', all with the active folder path '\Invoice Processing'. The 'Invoice Review' row is highlighted in yellow. On the left sidebar, there are links for 'New', 'Properties', 'Delete', and 'Workflow Steps'. A red arrow points to the 'Workflow Steps' link.

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

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

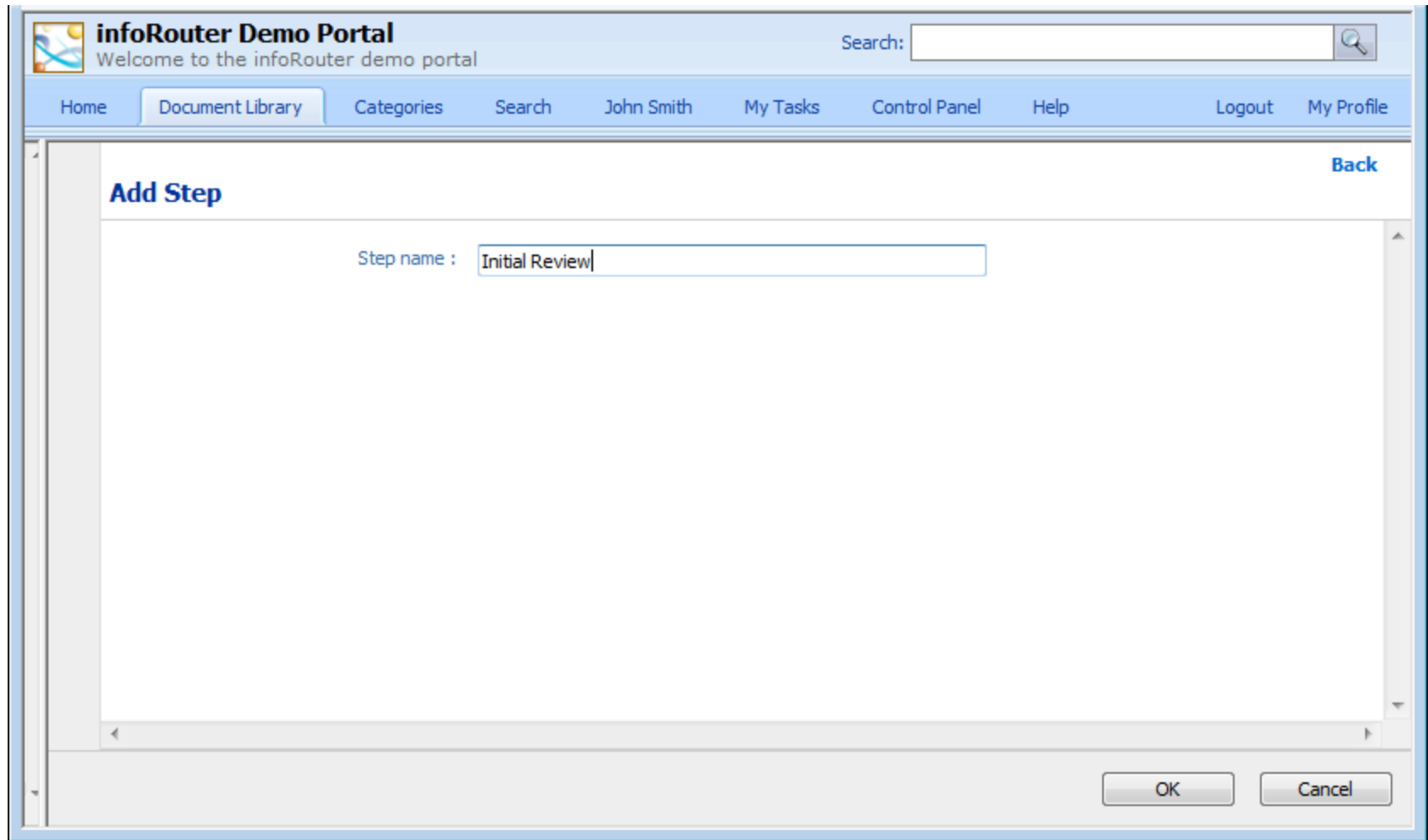
# Adding steps to an existing Workflow

The screenshot shows the 'infoRouter Demo Portal' interface. The top navigation bar includes links for Home, Document Library, Categories, Search, John Smith, My Tasks, Control Panel, Help, Logout, and My Profile. A search bar is located on the right. The main content area is titled 'Workflow Steps and Tasks - Invoice Review' and features a table with columns: Task name, Priority, Deadline, Assign to, and Task rule. A left sidebar contains a list of actions: 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.

Task name	Priority	Deadline	Assign to	Task rule
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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 links: 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 :'. The text 'Initial Review' is entered into this field. A 'Back' link is located in the top right corner of the main content area. At the bottom right, there are two buttons: 'OK' and 'Cancel'.

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

**Add Step** [Back](#)

Step name :

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. The top navigation bar includes links for Home, Document Library, Categories, Search, John Smith, My Tasks, Control Panel, Help, Logout, and My Profile. A search bar is located on the right. The main content area is titled 'Workflow Steps and Tasks - Invoice Review' and features a table with the following structure:

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

On the left side, there is a sidebar with the following links: Add Step, Edit Step, Delete Step, Add Task, Edit Task, Delete Task, and Graphical View. A red arrow points to the 'Add Task' link.

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

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 :

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)

The screenshot shows a window titled "Task Definition - Invoice Review - Step 1 -". At the top right are "Help" and "Back" links. The main content area has a text box at the top with the text: "ORDER HAS BEEN ISSUED FOR AN AMOUNT EQUAL to or higher than the invoice amount, pass the invoice along for further processing." Below this is a "Supervisor" field containing "John Smith" and a "Select..." button, both enclosed in a red oval. Underneath is a "Send notification to supervisor" section with a value of "0" and a "Days after due date" dropdown. The "Task permissions" section contains a grid of checkboxes: "Edit document", "Postpone task", "Change task priority", "Change finish date", "Edit next step", and "Edit all steps". The "Task requirements" section contains a grid of checkboxes: "Read" (checked and circled in red), "Read published version", "Comments", "Approve/Reject decision" (checked and circled in red), "ISO/Periodic review", "SOX Review", "Classification downgrade", "Declassification", "Edit", and "Archive". Red arrows point from the left margin to the "Task permissions" and "Task requirements" labels. At the bottom are "OK" and "Cancel" buttons.

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 : John Smith Select...

Send notification to supervisor : 0 Days after due date

Task permissions :

- ☐ Edit document
- ☐ Postpone task
- ☐ Change task priority
- ☐ Change finish date
- ☐ Edit next step
- ☐ Edit all steps

Task requirements :

- ☒ Read
- ☐ Read published version
- ☐ Comments
- ☒ Approve/Reject decision
- ☐ ISO/Periodic review
- ☐ SOX Review
- ☐ Classification downgrade
- ☐ Declassification
- ☐ Edit
- ☐ Archive

OK Cancel

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 displays the 'infoRouter Demo Portal' interface. The top navigation bar includes links for Home, Document Library, Categories, Search, John Smith, My Tasks, Control Panel, Help, Logout, and My Profile. A search bar 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 table is organized into four steps: 1 - Initial Review, 2 - Supervisor Review, 3 - Manager Review, and 4 - Payment processing A/P. The first step, 'Initial Review', contains a task named 'Initial invoice review' with a priority of 'Normal', a deadline of '1 Day(s)', assigned to '\* AP Clerks', and a task rule stating 'One user is enough to'. Below the task table, there is a section for 'Task Instructions' which reads: '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.'

**infoRouter Demo Portal**  
Welcome to the infoRouter demo portal

Search:

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


	Task name	Priority	Deadline	Assign to	Task rule
<b>1 - Initial Review</b>					
	Initial invoice review	Normal	1 Day(s)	* AP Clerks	One user is enough to
<b>Task Instructions:</b> 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.					
<b>2 - Supervisor Review</b>					
<b>3 - Manager Review</b>					
<b>4 - Payment processing A/P</b>					

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
<b>1 - Initial Review</b>						
	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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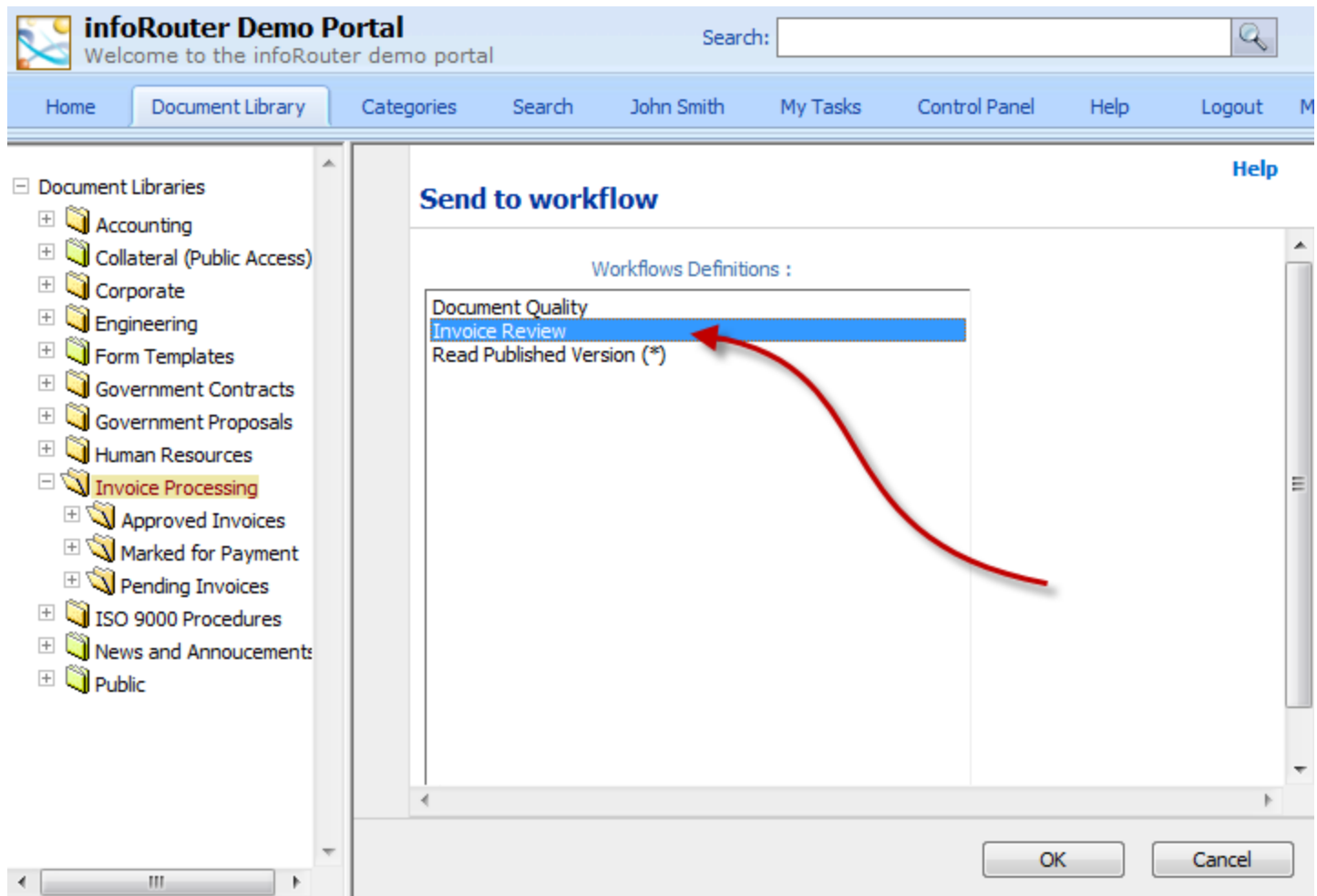
**Task Instructions:** Please process the attached invoice for check issuance.

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

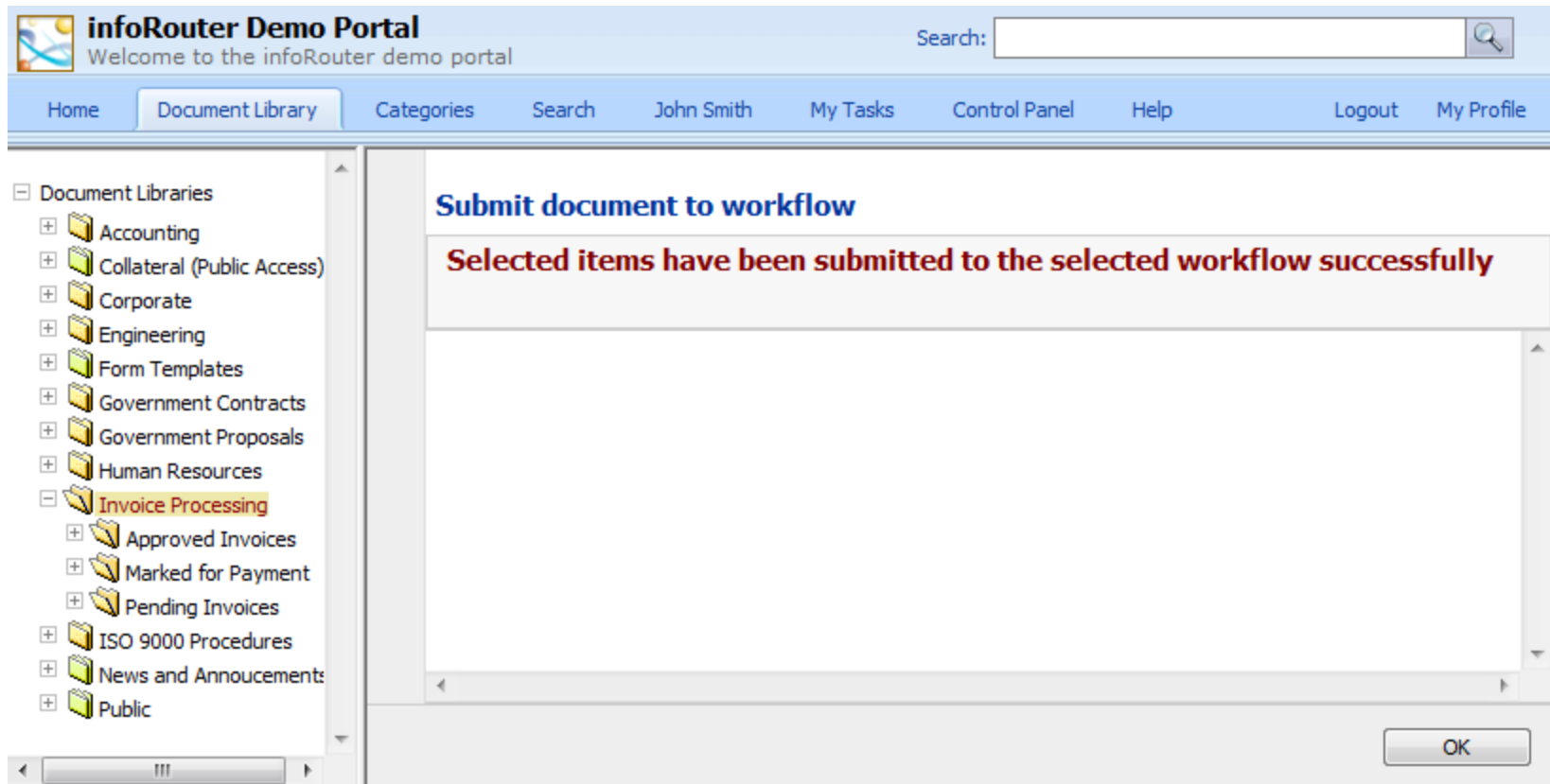
The screenshot displays a web-based document management system. The top navigation bar includes links for Home, Document Library (active), Categories, Search, John Smith, My Tasks, Control Panel, Help, Logout, and My Profile. The left sidebar shows a tree of document libraries, with 'Invoice Processing' selected and highlighted. 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 first PDF document, '1001918\_80146000.pdf', showing options like Properties, Security, Cut, Copy, Delete, Check out, Set retention period, Set completion status, Send to, Comments, Add comment, Send to workflow (highlighted), and Create task. The bottom status bar shows '1 - 9' and 'Total Item Count: 6'.

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

Select the workflow we just created and click ok.

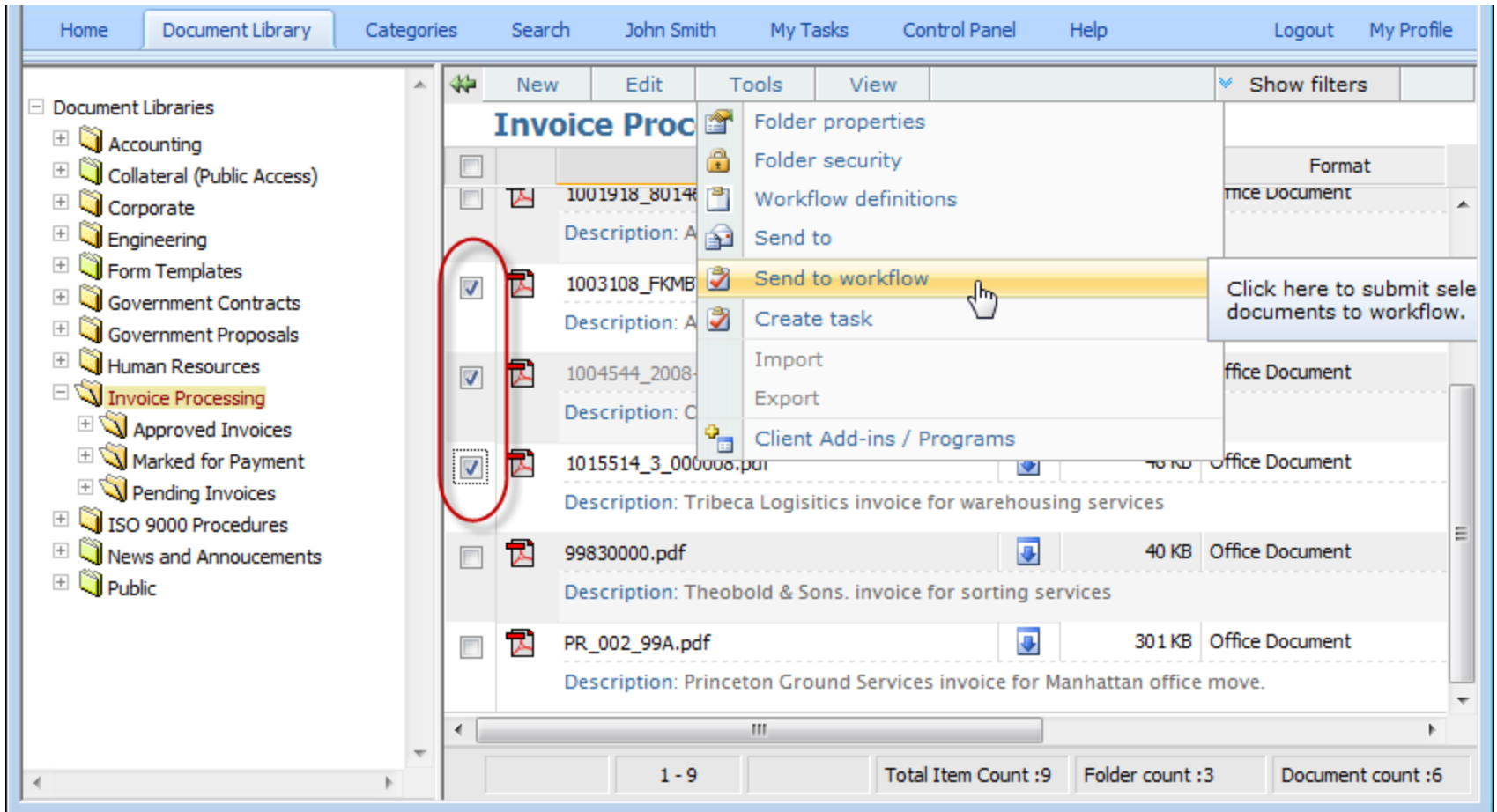


The document has now been submitted to the “Invoice Review” workflow.



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 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 displays a tree view of Document Libraries, with 'Invoice Processing' selected and highlighted. The main content area shows the 'Invoice Processing' folder, which contains three subfolders: 'Approved Invoices', 'Marked for Payment', and 'Pending Invoices'. A context menu is open over the 'Workflow status' option, which is highlighted in yellow. A tooltip message states: 'Click here to view the workflow status with workflow status included.' The main content area also displays a list of documents, including '1001918\_80146000.pdf', '1003108\_FKMBT\_C252081125174628.pdf', '1004544\_2008-12-08\_0018.pdf', and '1015514\_3\_000008.pdf'. The bottom status bar shows '1 - 9', 'Total Item Count :9', 'Folder count :3', and 'Document count :6'.

Document Libraries

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- Invoice Processing**
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  - Marked for Payment
  - Pending Invoices
- ISO 9000 Procedures
- News and Announcements
- Public

**Invoice Processing**

Name

- Approved Invoices  
Description: This folder contains approved invoices.
- Marked for Payment  
Description: Marked for payment.
- Pending Invoices  
Description: This folder contains pending invoices.

Workflow status

Click here to view the workflow status with workflow status included.

1001918\_80146000.pdf  
Description: ACME invoice

1003108\_FKMBT\_C252081125174628.pdf  
Description: Acme invoice for storage services

1004544\_2008-12-08\_0018.pdf  
Description: Centex invoice. HOLD. Do not process!!!!

1015514\_3\_000008.pdf  
Description: Tribeca Logistics invoice for warehousing services

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. A search bar is located on the right. Below the navigation bar, the 'My Tasks' section is displayed. It contains a table with the following columns: Action, Doc. Id, Document name, Priority, Task status, Due Date, Date assigned, and Assignee. A single task is listed with a status of 'Pending' and a due date of '26 September 2010 15:37:12'. The document name is '1001918\_80146000.pdf'. Red arrows point to the 'Open task' button (a plus sign and a document icon) in the Action column, the document name '1001918\_80146000.pdf', and the 'My Tasks' link in the navigation bar.

Action	Doc. Id	Document name	Priority	Task status	Due Date	Date assigned	Assignee
	2387	<u>1001918_80146000.pdf</u>	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

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

**Task** Help Back

Complete task  
Edit Comment  
Add Attachment  
Create associated task  
Reassign to  
Document Properties  
Show Workflow

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

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 a list of actions: 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 details for a task with 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, and Supervisor: John Smith. At the bottom, the 'Task Instructions' section contains 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.'

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

Task

Complete task  
Edit Comment  
**Add Attachment**  
Create associated task  
Reassign to  
Document Properties  
Show Workflow

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

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

# Creating Associated Tasks (Ad-hoc tasks)

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

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

Complete task  
Edit Comment  
Add Attachment  
**Create associated task**  
Reassign  
Document Properties  
Show Workflow

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

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 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. At the top is a navigation bar with links: Home, Document Library, Categories, Search, Beverly Thompson, My Tasks (selected), Control Panel, Help, Logout, and My Profile. Below this is a sidebar on the left with a blue background containing several links: 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 has a title 'Task' and a 'Help' and 'Back' link. It contains the following information: 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, 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.

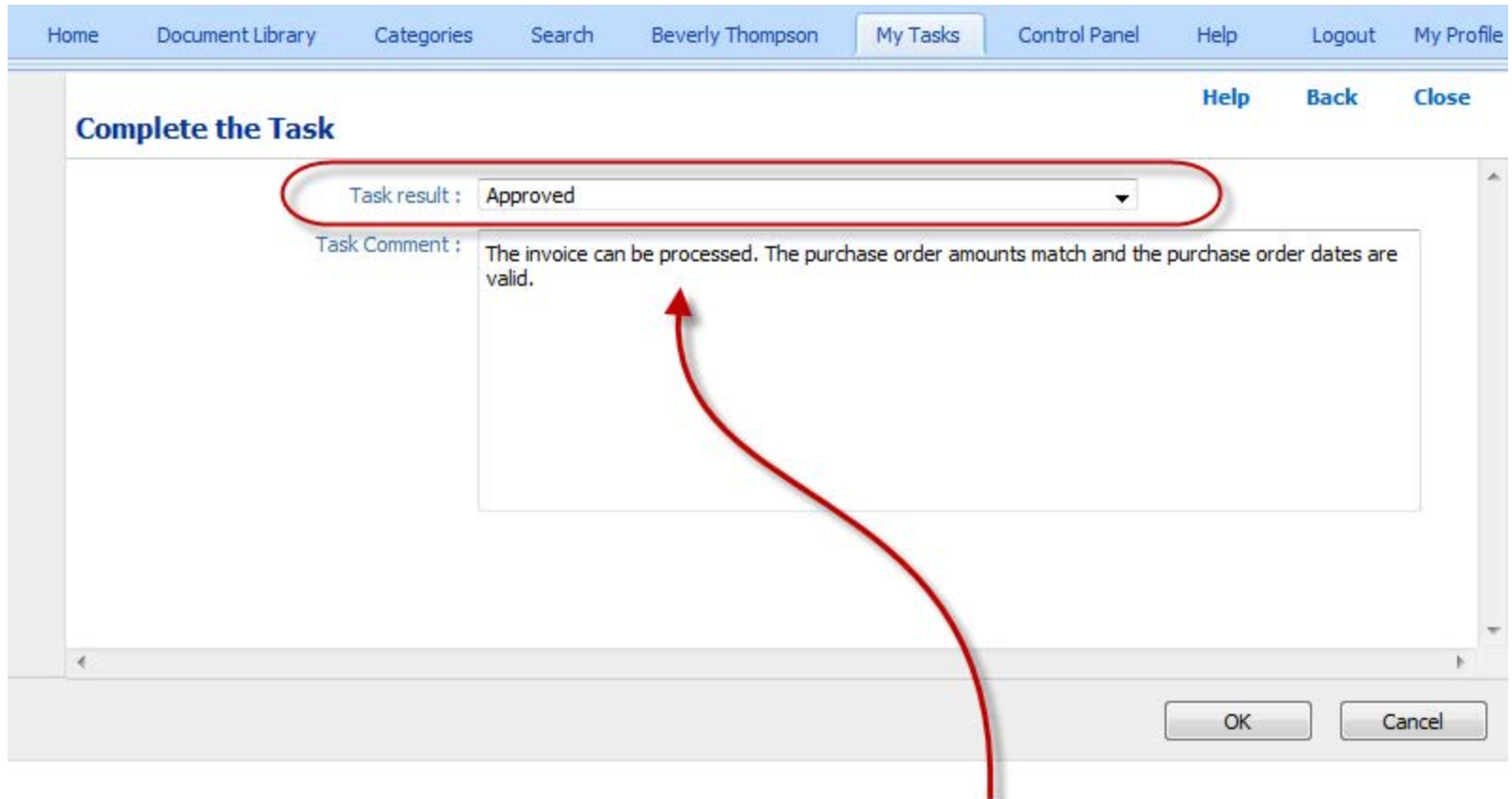
If you know you are going to be away on vacation, simply navigate to “My Profile” and assign your tasks to someone else and enter begin and end dates so all tasks you may be assigned during those dates are automatically routed to the designated user. Note: Your existing tasks stay with you.

*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



The screenshot shows a web application interface with a top navigation bar containing links: Home, Document Library, Categories, Search, Beverly Thompson, My Tasks, Control Panel, Help, Logout, and My Profile. Below this, a sub-header area contains 'Help', 'Back', and 'Close' links. The main content area is titled 'Complete the Task'. It features a 'Task result' dropdown menu with 'Approved' selected, which is circled in red. Below it is a 'Task Comment' text area containing the text: 'The invoice can be processed. The purchase order amounts match and the purchase order dates are valid.' A red arrow points from the bottom of the dialog box up to the comment text area. At the bottom right of the dialog box are 'OK' and 'Cancel' buttons.

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

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

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

The screenshot displays a web application interface for document management. 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. The main content area is titled 'Invoice Processing' and shows a list of items: 'Pending Invoices' (Folder) and '1001918\_80146000.pdf' (Office Document). Below this, the 'Invoice Review' workflow is detailed in a table.

Step	Task name	Task owner	Task status	Start Date
1 - Initial Review	Initial invoice review	Beverly Thompson	Task completed / <b>Approved</b>	25 September 2010
2 - Supervisor Review	<a href="#">Supervisor invoice check</a>	Dianna Finch	Pending	25 September 2010
2 - Supervisor Review	<a href="#">Supervisor invoice check</a>	Carolyn Kenny	Pending	25 September 2010
2 - Supervisor Review	<a href="#">Supervisor invoice check</a>	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

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

New Edit Tools View Show filters

## 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 A/P	Check processing	Bob Bishop Carolyn Kenny Dianna Finch	Not started	

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

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

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

Carolyn has approved the invoice for further processing.

# Workflow progression

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

New Edit Tools View Show filters

### 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

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

My Tasks

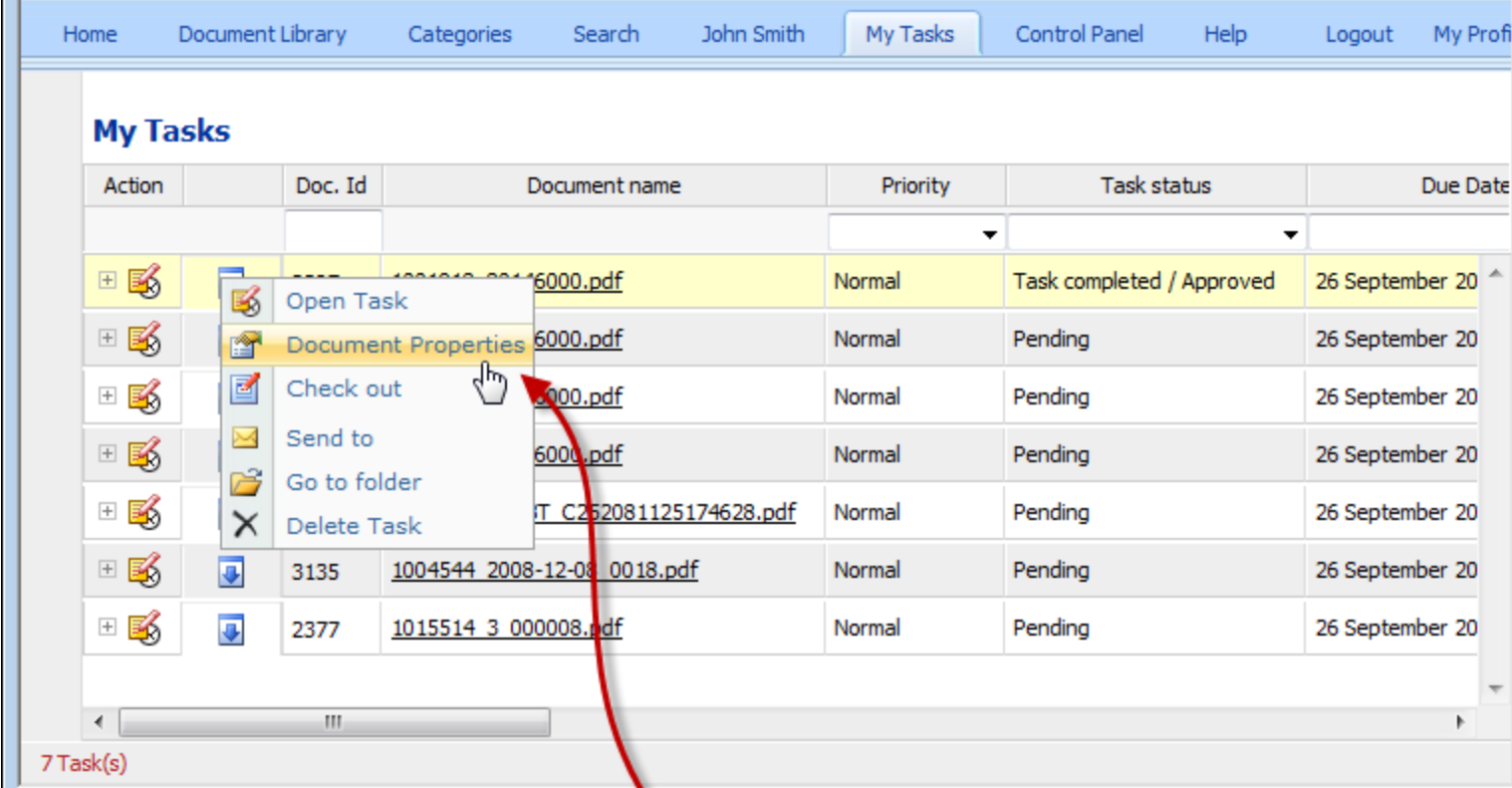
Action		Doc. Id	Document name	Priority	Task status	Due Date	Date assigned
		3406					
 		3406	<a href="#">1001918_80146000.pdf</a>	Normal	Task completed / <span>Approved</span>	28 September 2010 12:34:32	27 September 2010 12:34
 		3406	<a href="#">1001918_80146000.pdf</a>	Normal	Pending	28 September 2010 12:43:44	27 September 2010 12:43
 		3406	<a href="#">1001918_80146000.pdf</a>	Normal	Task completed / <span>Approved</span>	28 September 2010 12:43:44	27 September 2010 12:43
 		3406	<a href="#">1001918_80146000.pdf</a>	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' screen of a web application. The top navigation bar includes links for Home, Document Library, Categories, Search, John Smith, My Tasks (active), Control Panel, Help, Logout, and My Profile. The main content area is titled 'My Tasks' and displays a table with the following columns: Action, Doc. Id, Document name, Priority, Task status, and Due Date. A context menu is open over the first row, showing options: Open Task, Document Properties (highlighted), Check out, Send to, Go to folder, and Delete Task. A red arrow points from the 'Document Properties' option to the text 'The menu provides convenient links to task related screens.' below the screenshot.

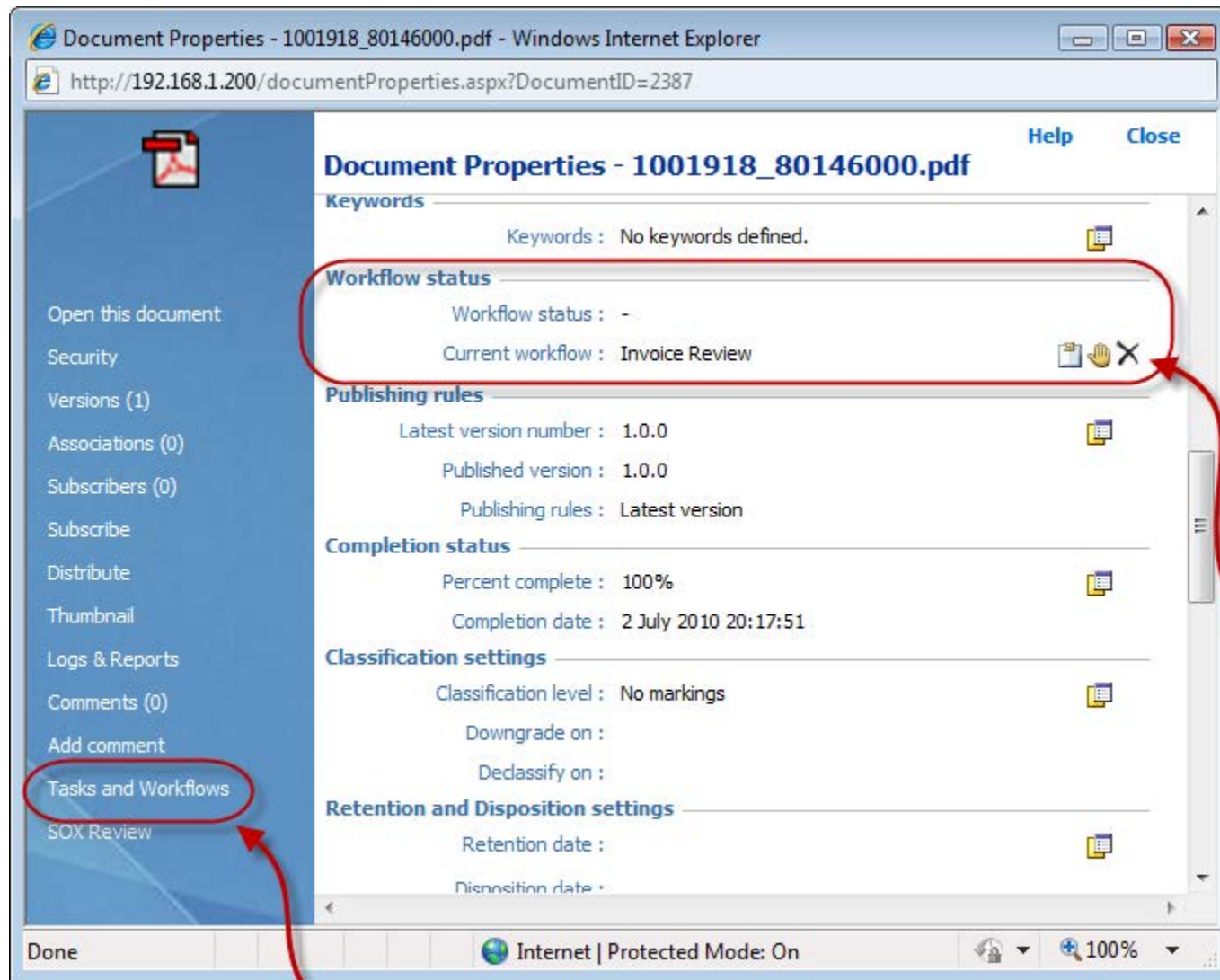
Action	Doc. Id	Document name	Priority	Task status	Due Date
[+][x]	3135	1004544 2008-12-03 0018.pdf	Normal	Task completed / Approved	26 September 20
[+][x]		6000.pdf	Normal	Pending	26 September 20
[+][x]		6000.pdf	Normal	Pending	26 September 20
[+][x]		6000.pdf	Normal	Pending	26 September 20
[+][x]		6000.pdf	Normal	Pending	26 September 20
[+][x]		IT_C252081125174628.pdf	Normal	Pending	26 September 20
[+][x]	3135	1004544 2008-12-03 0018.pdf	Normal	Pending	26 September 20
[+][x]	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



# infoRouter Workflows

Did you know about the infoRouter Forum site?  
24/7 Access to information about infoRouter

<http://forum.inforouter.com>

Active Innovations, Inc. A Document Management Company

[www.inforouter.com](http://www.inforouter.com)