infoRouter Workflows

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

Active Innovations, Inc. A Document Management Company

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.

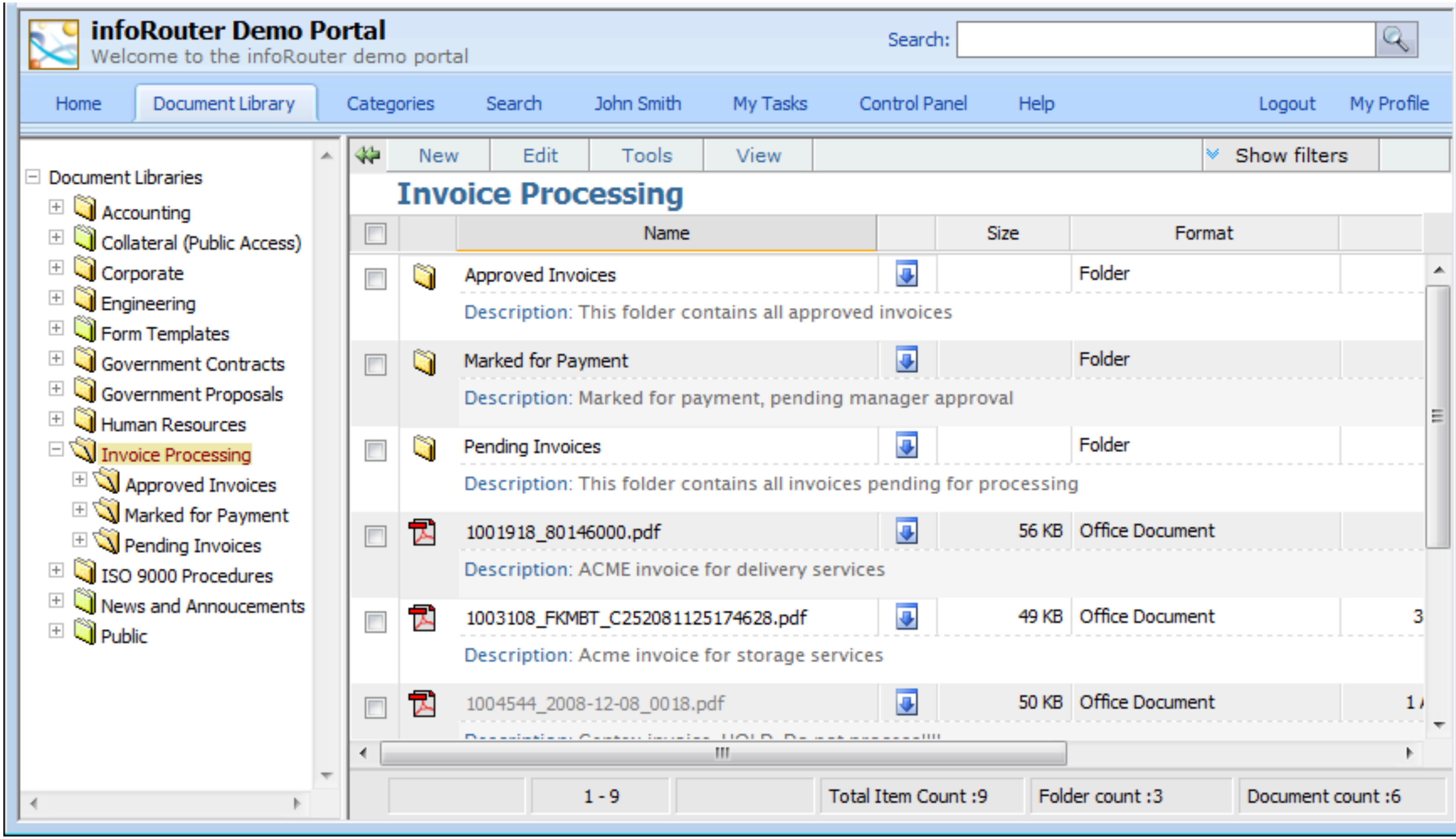
This powerful software will allow you to create complex workflow scenarios to streamline your business processes. You will be able to automate a business process, where a generated document will be passed from one user to the other via email notifications and task assignments. Each user(s) in the path 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.

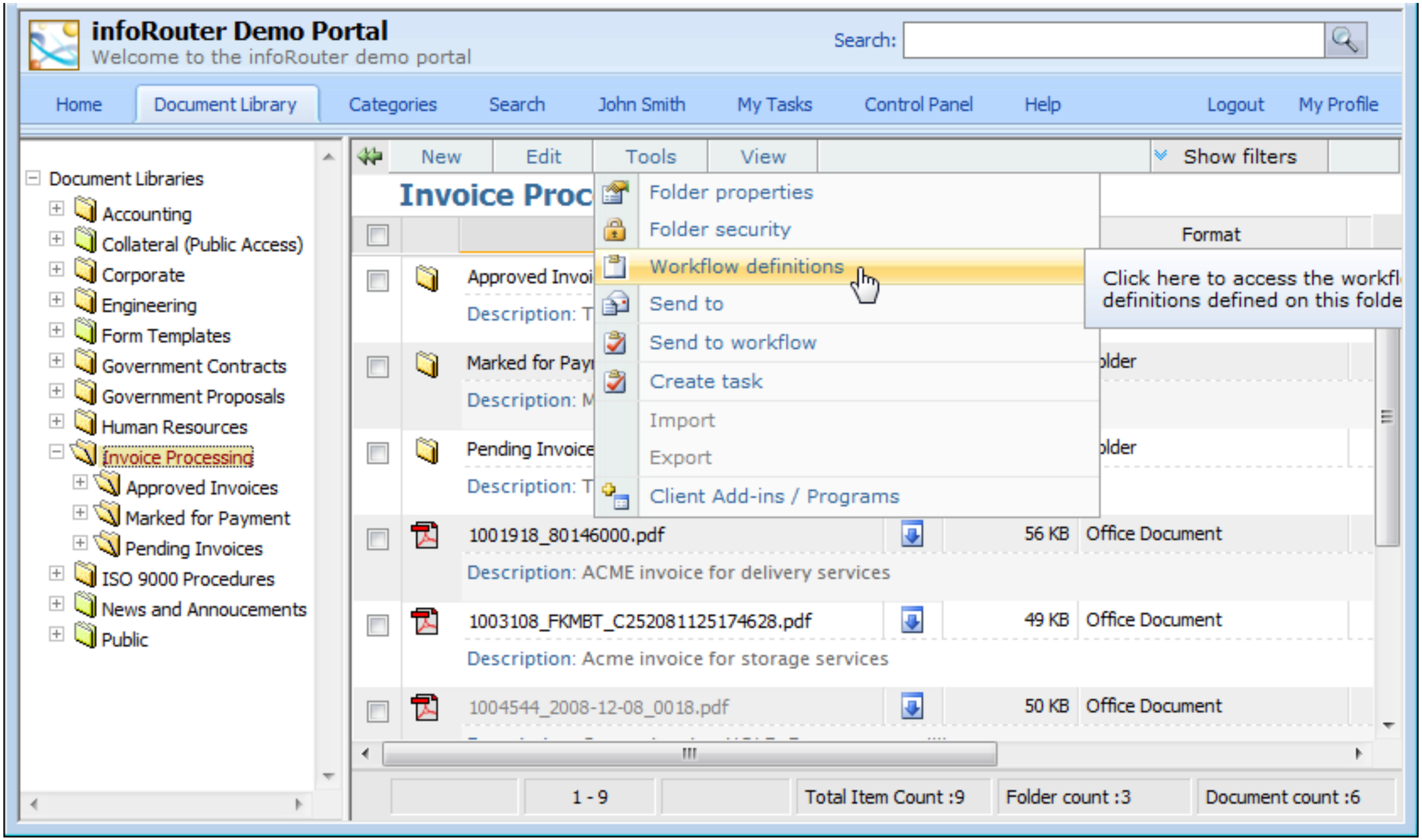
Requirements:

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.

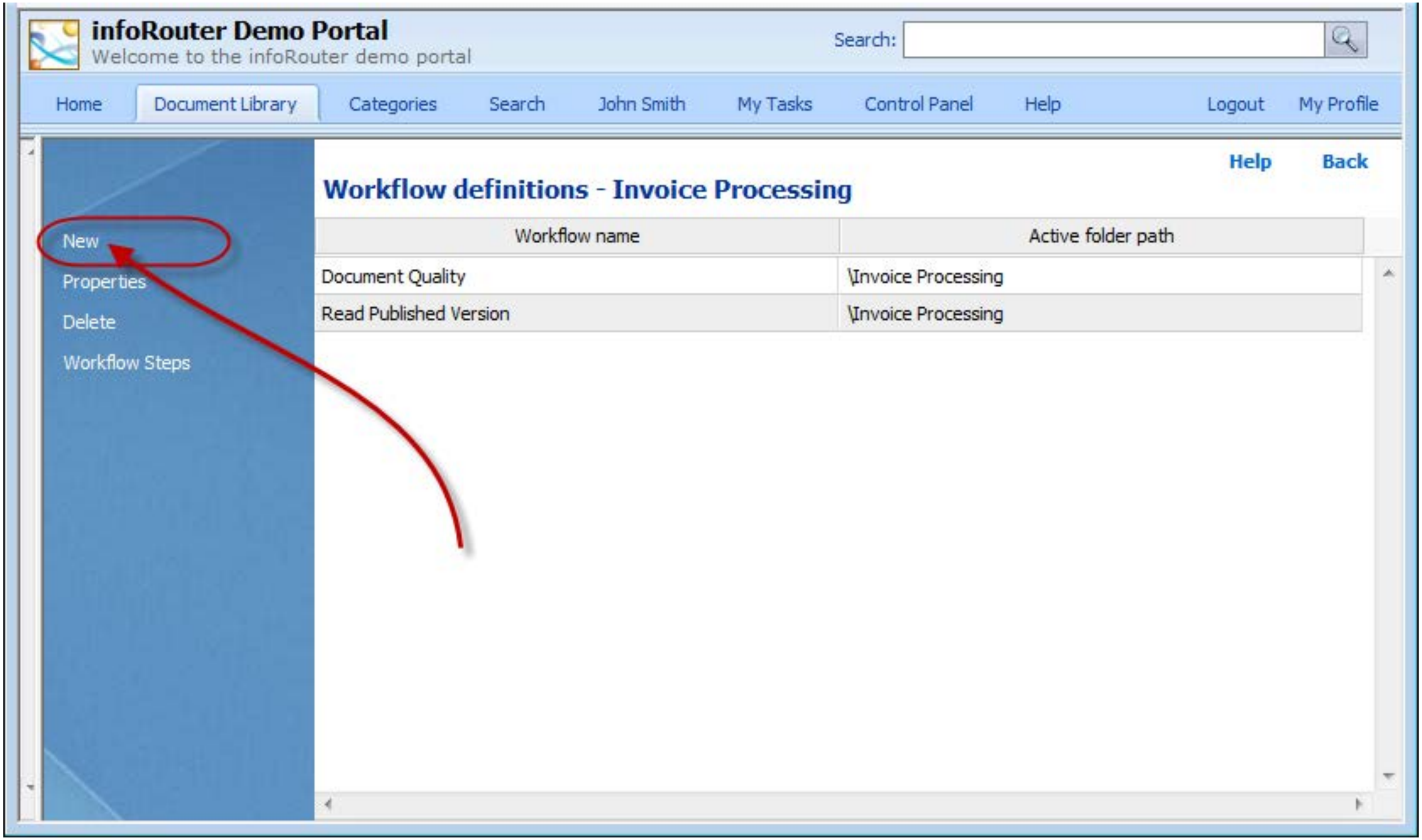
Select a library. Workflows are library specific



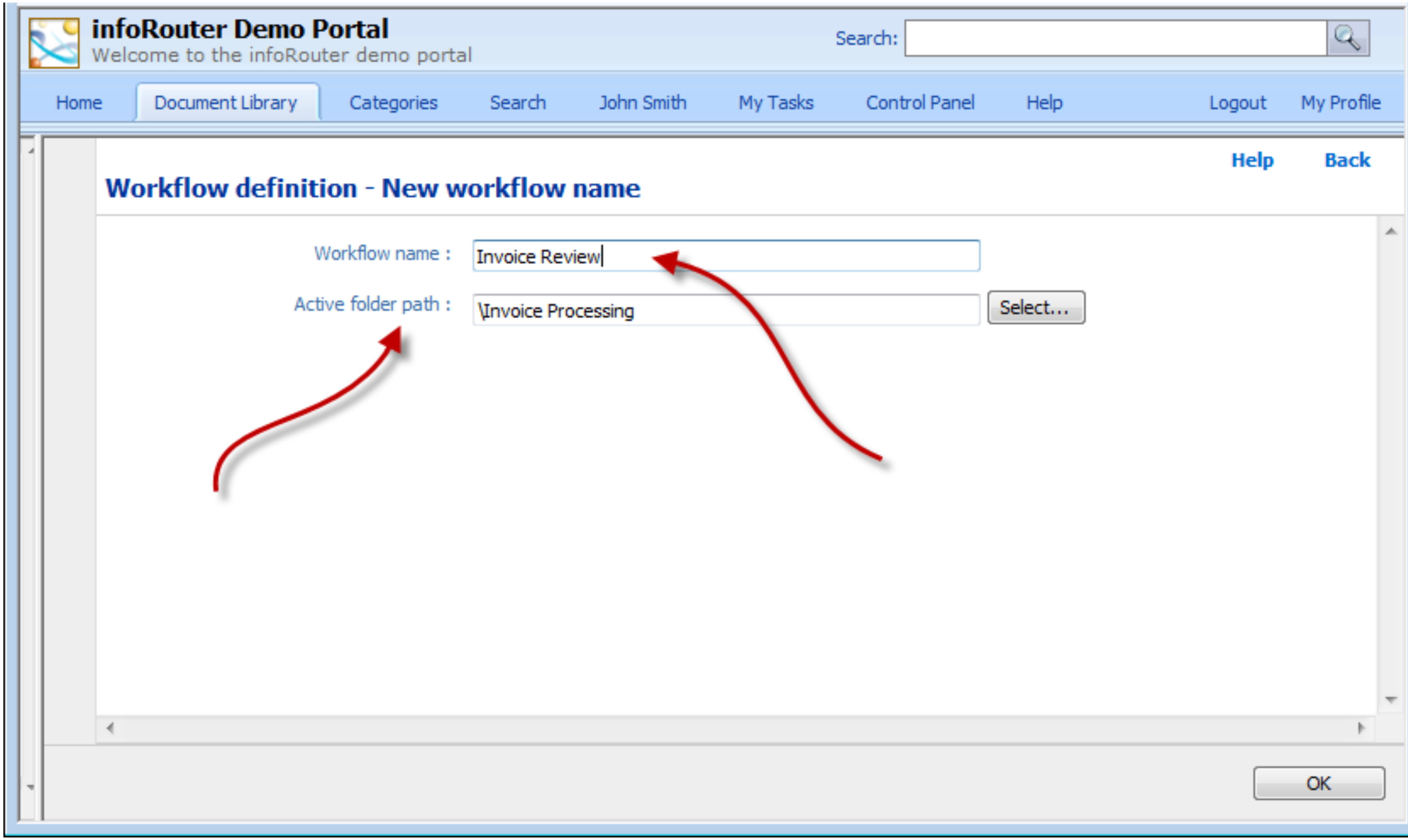
Choose “Workflow definitions” from the tools menu



Click “New” to create a new workflow definition

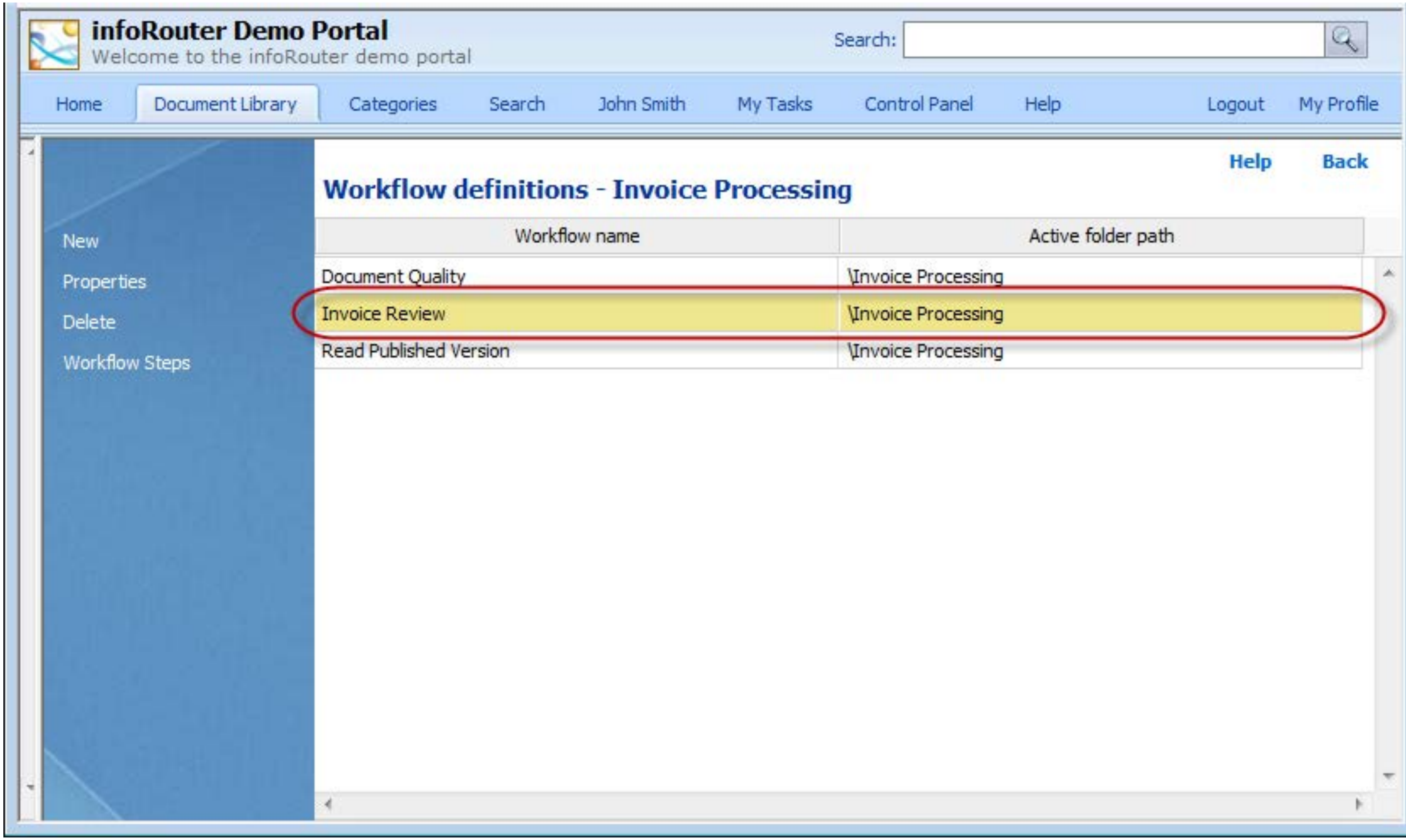


Enter basic workflow information



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



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.

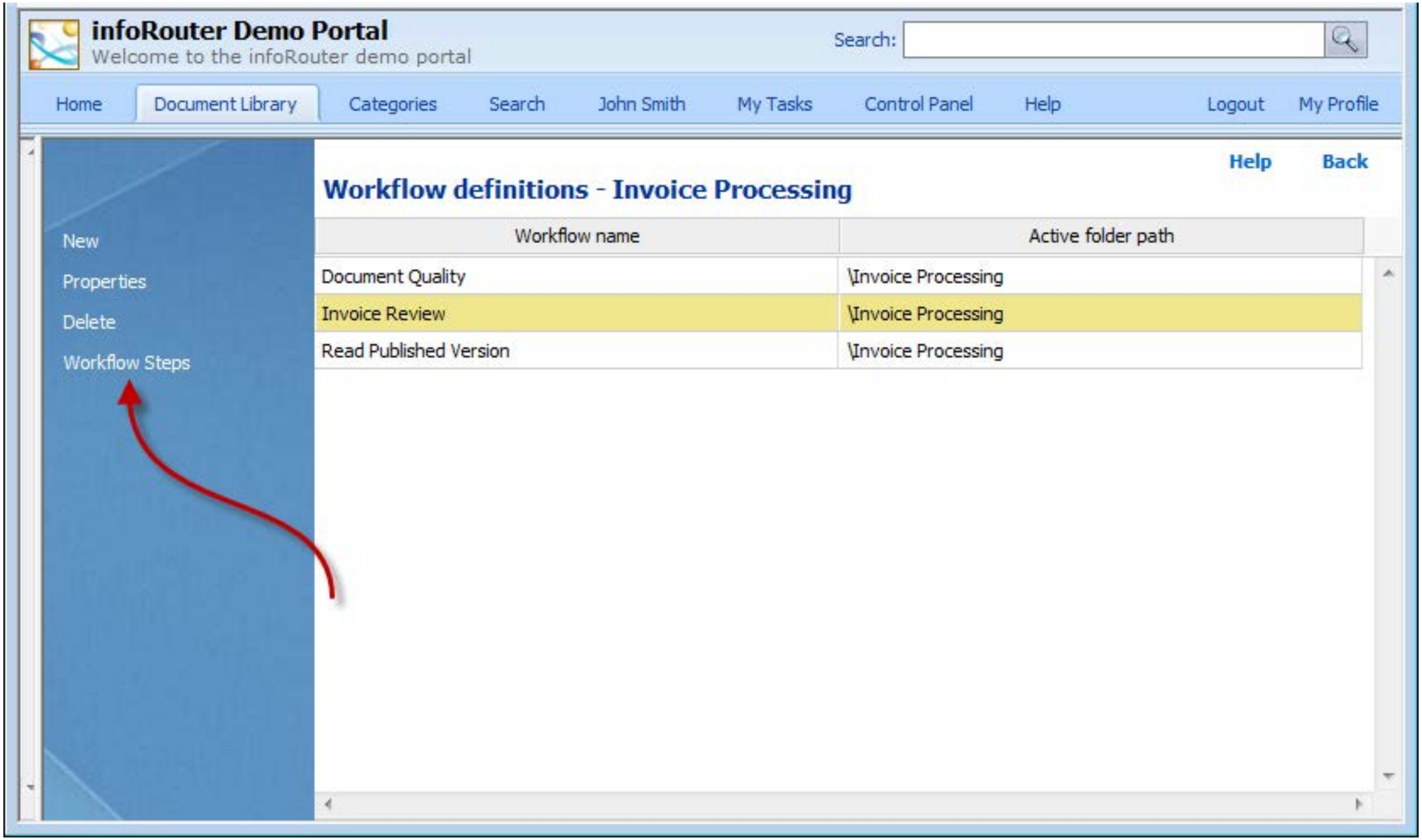
Tasks:
A task may be assigned to one or more users
If more than one assignee exists for a given task you may specify the following:

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.)

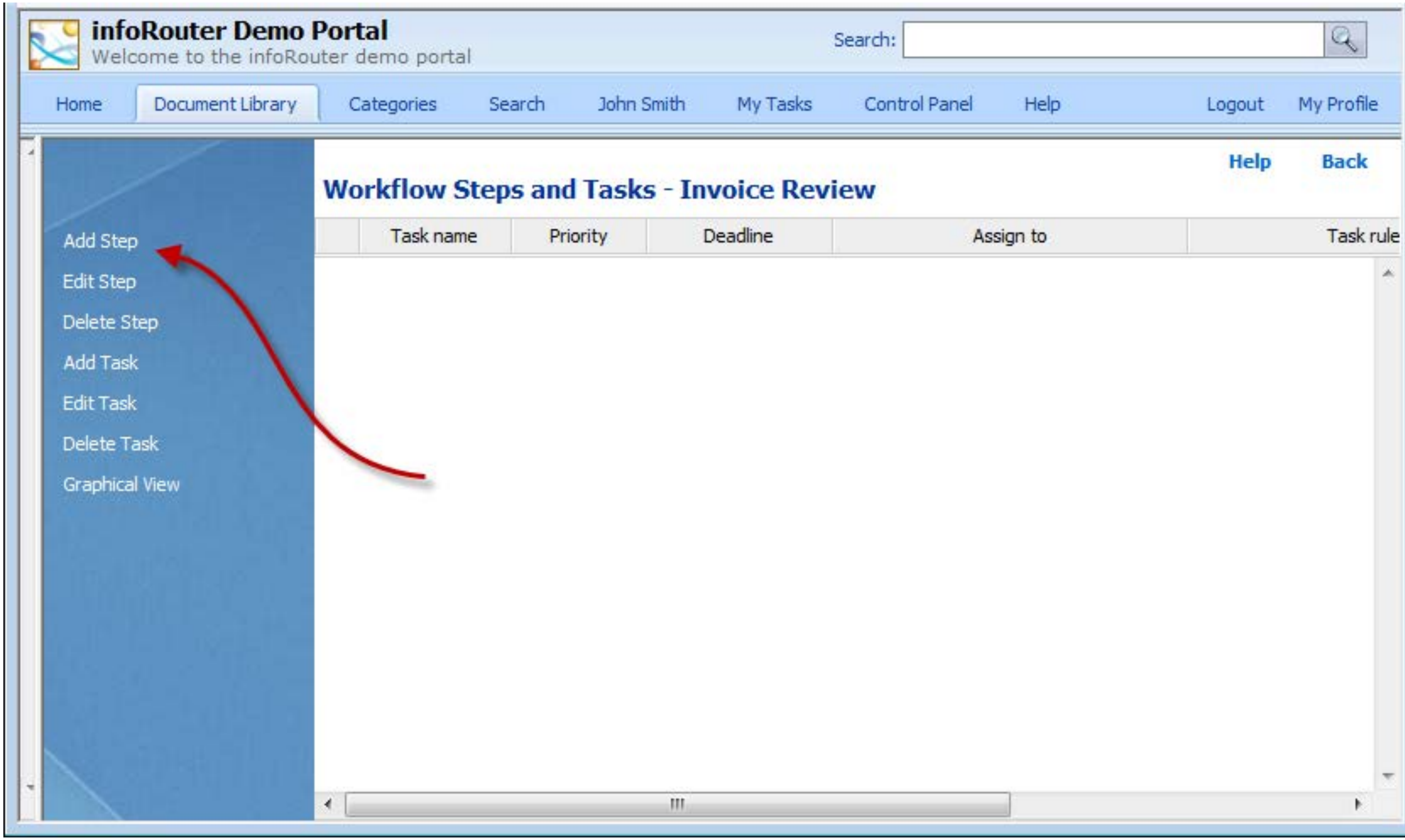
Now, let’s see them!

Let’s create a few steps



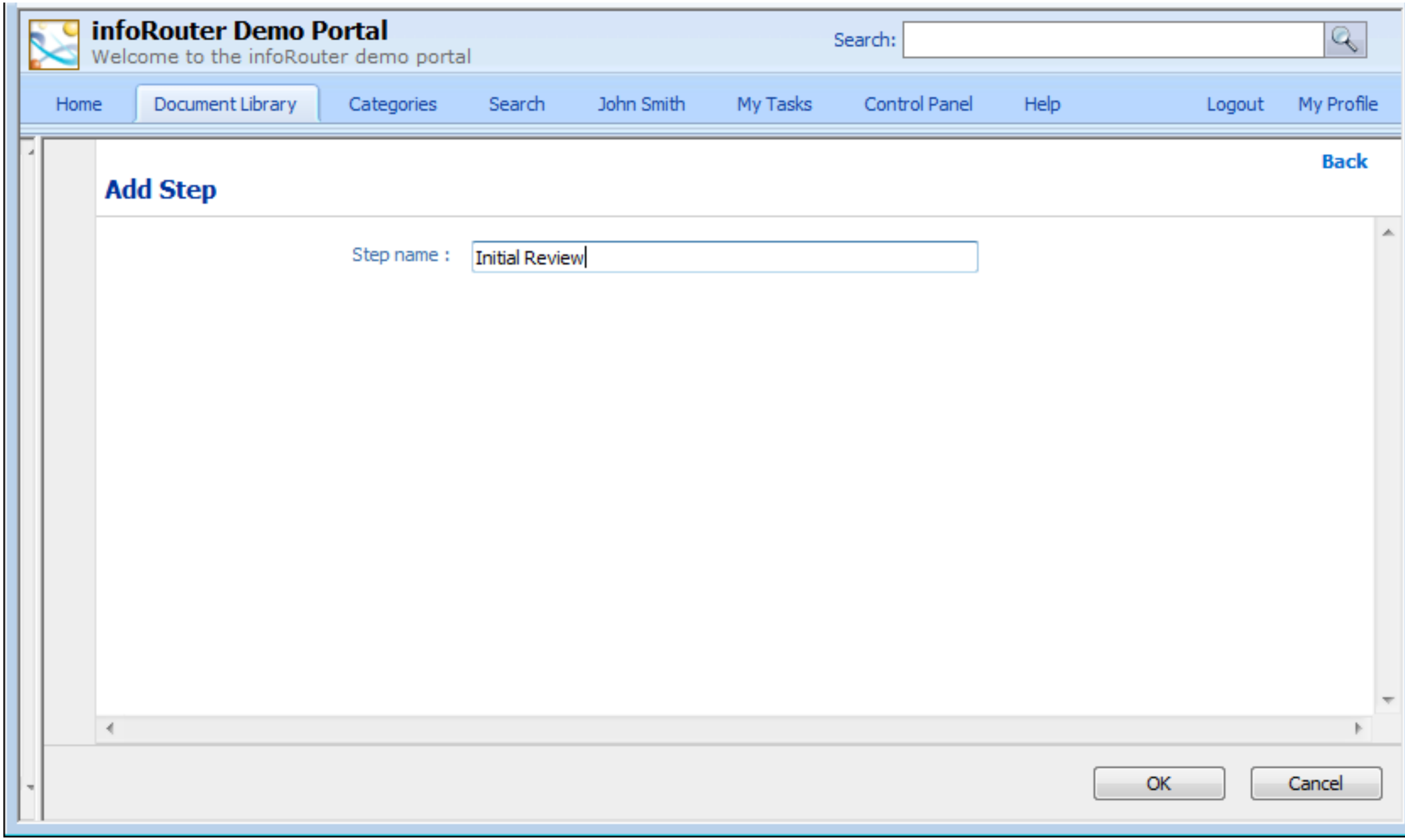
Click on the “Workflow steps” link to create a new step (or to view the ones that may exist)

Adding steps to an existing Workflow



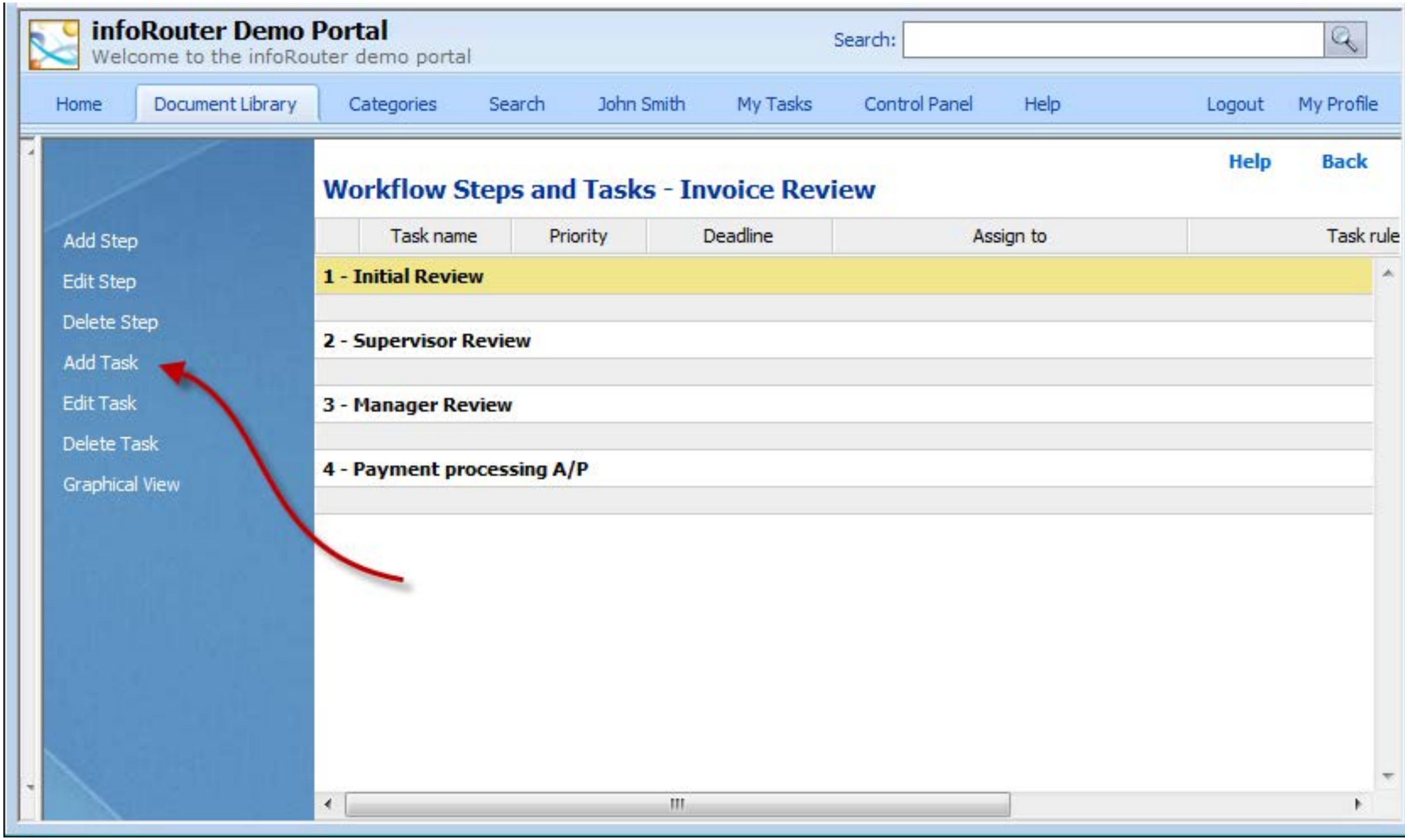
Click on the “Add Step” link to create a new step

Creating the step



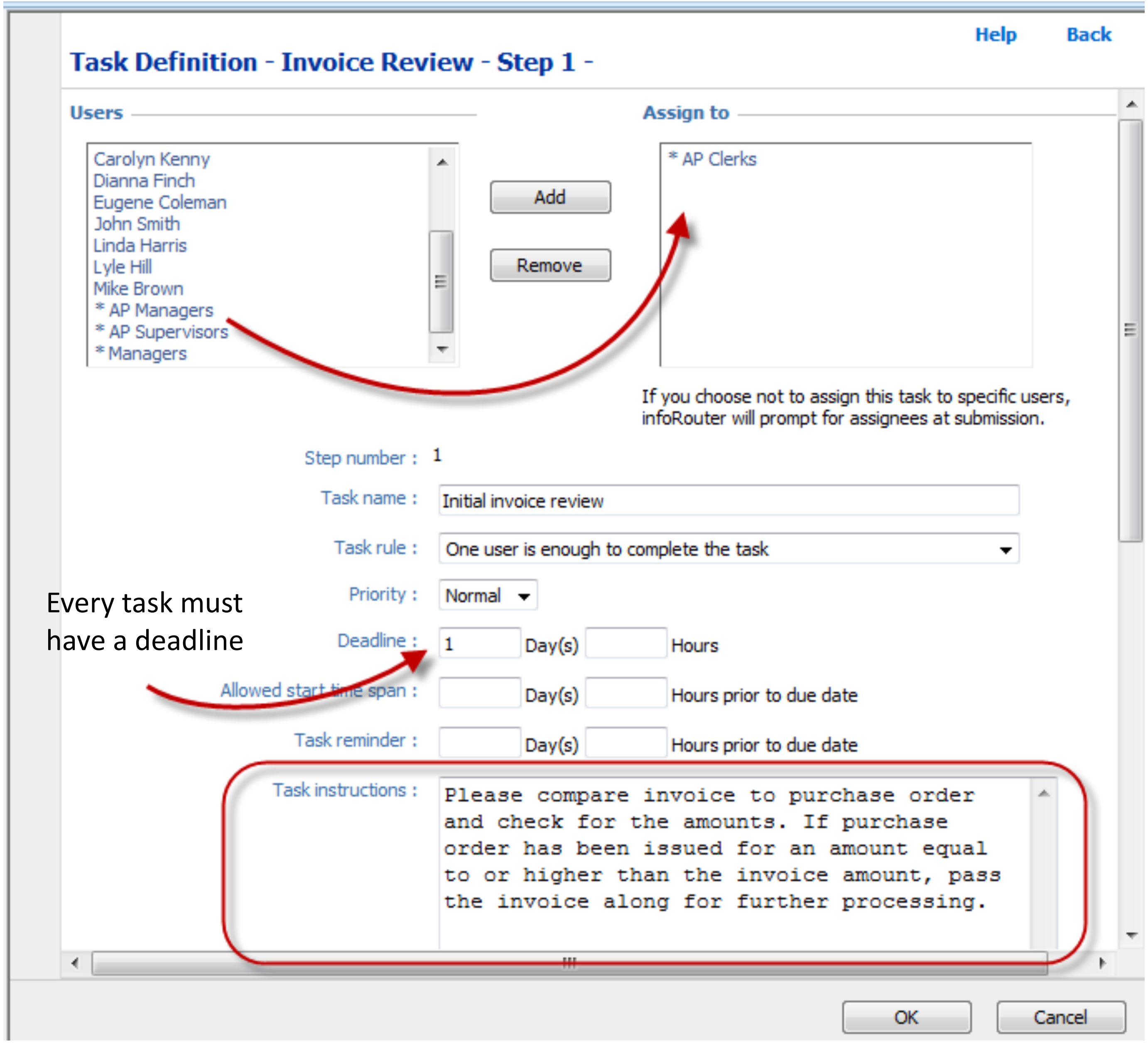
Enter a name for the step and click “OK”. Repeat this for as many steps as you need.

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



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

Task Definition window



Every task must have a deadline

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

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.

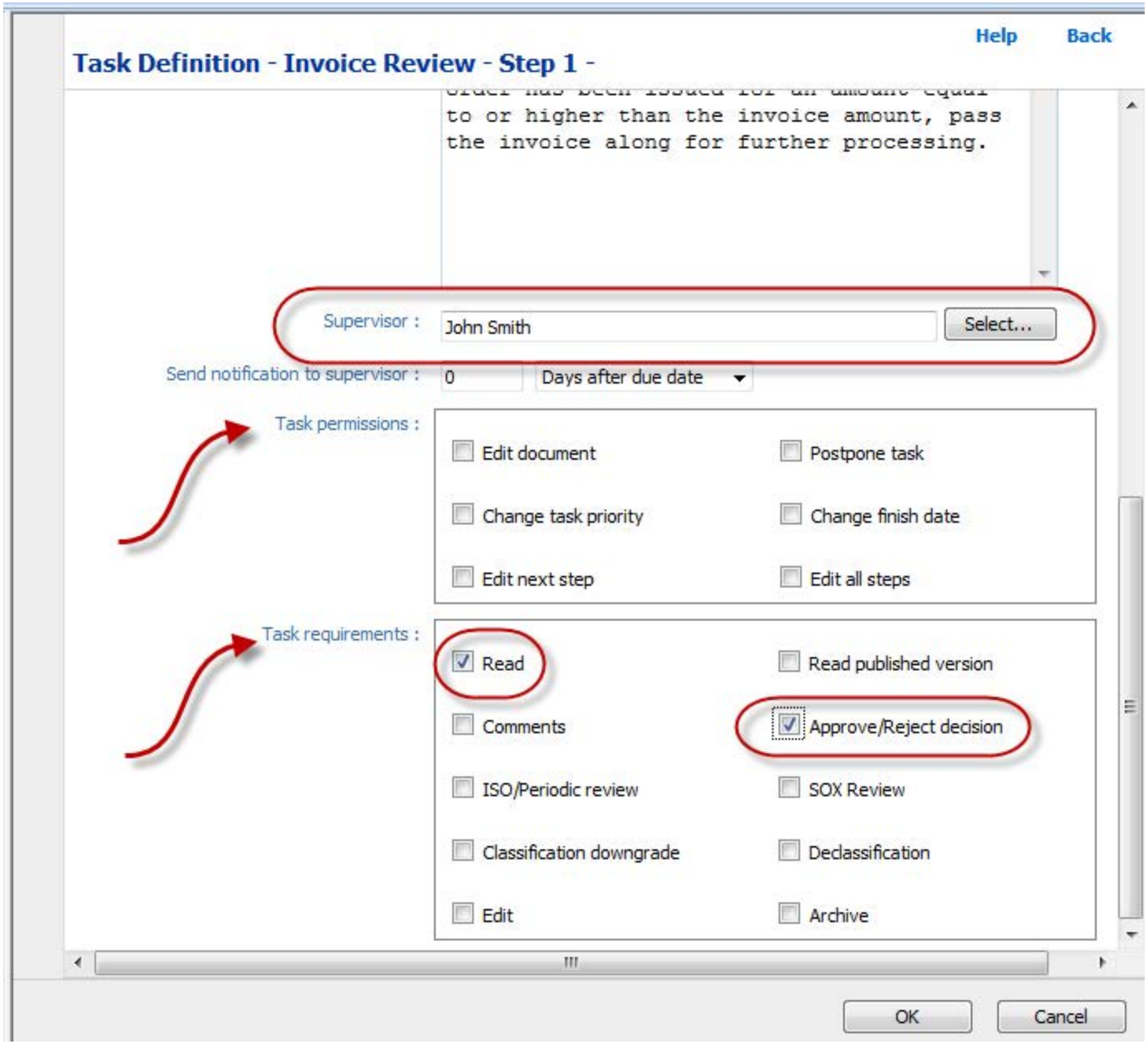
Exception to the rule:
If the “One user is enough to perform the task” rule has been set, then infoRouter will pick one of the users and assign the task ONLY to that user.

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)



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.

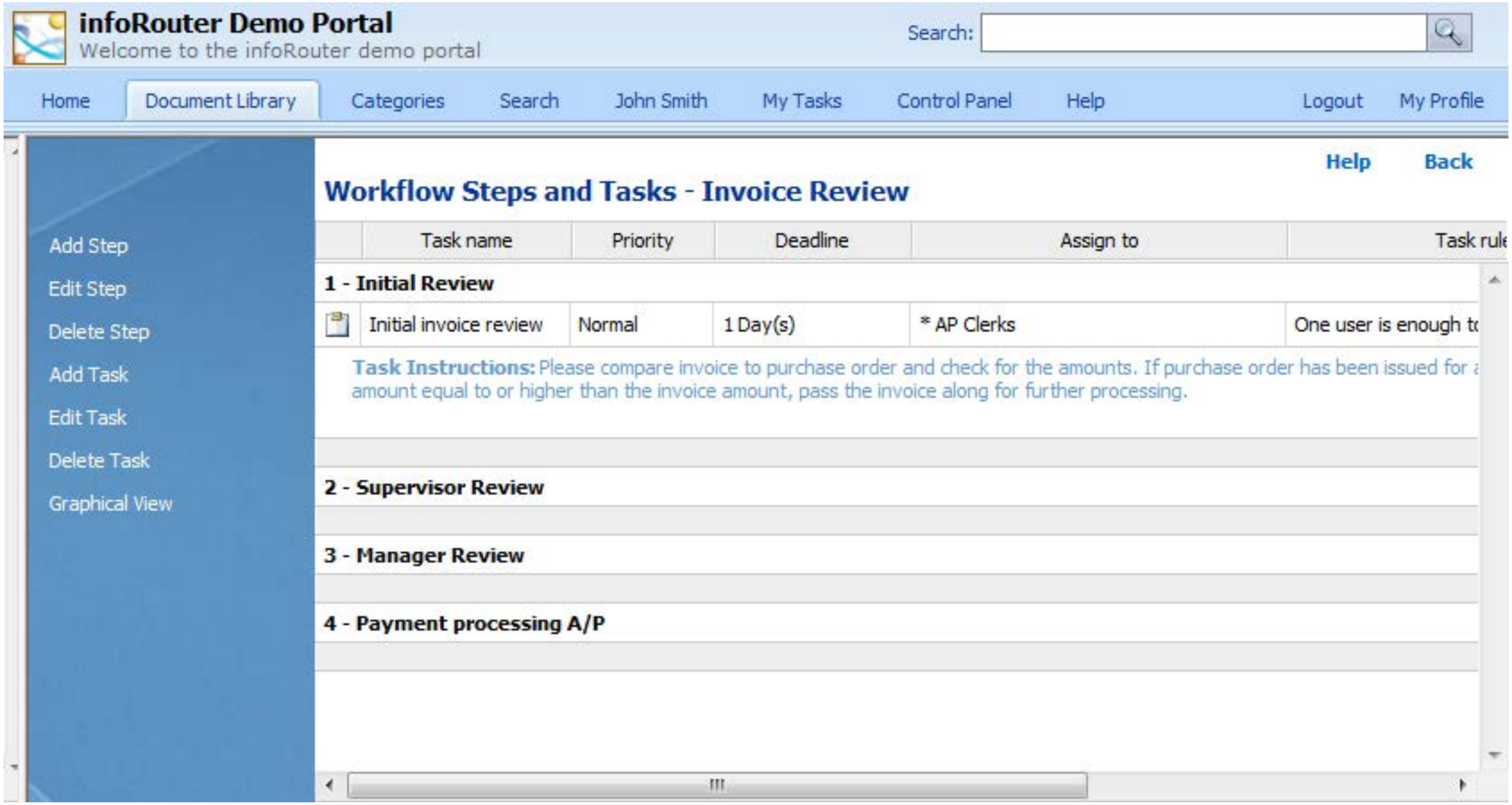
SOX Review:
This setting requires the assignee(s) to enter SOX comments prior to completing their tasks.

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



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.

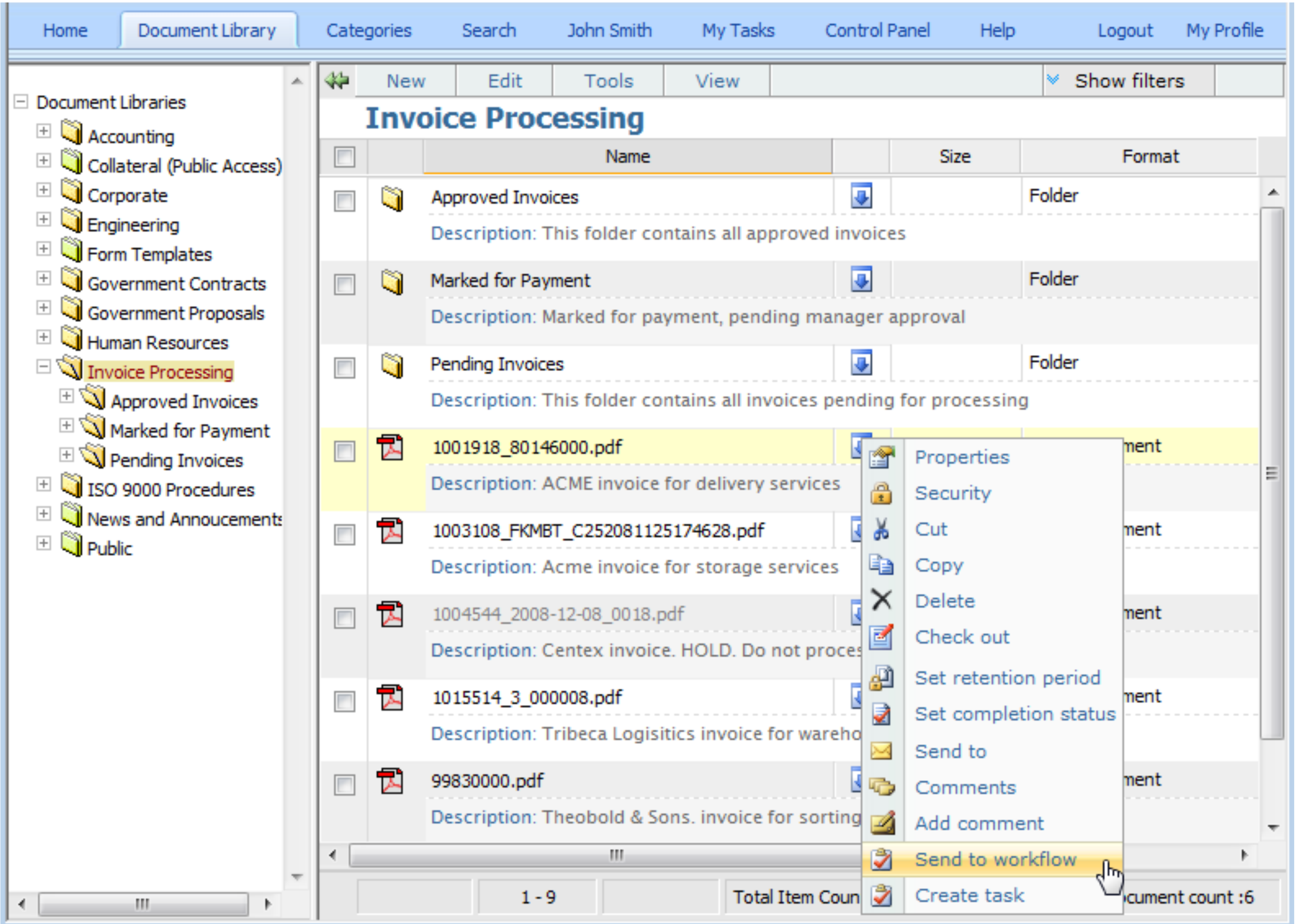
Here is how it looks after all the tasks have been defined and the workflow definition is complete. Now let's submit invoices to this workflow.

Help

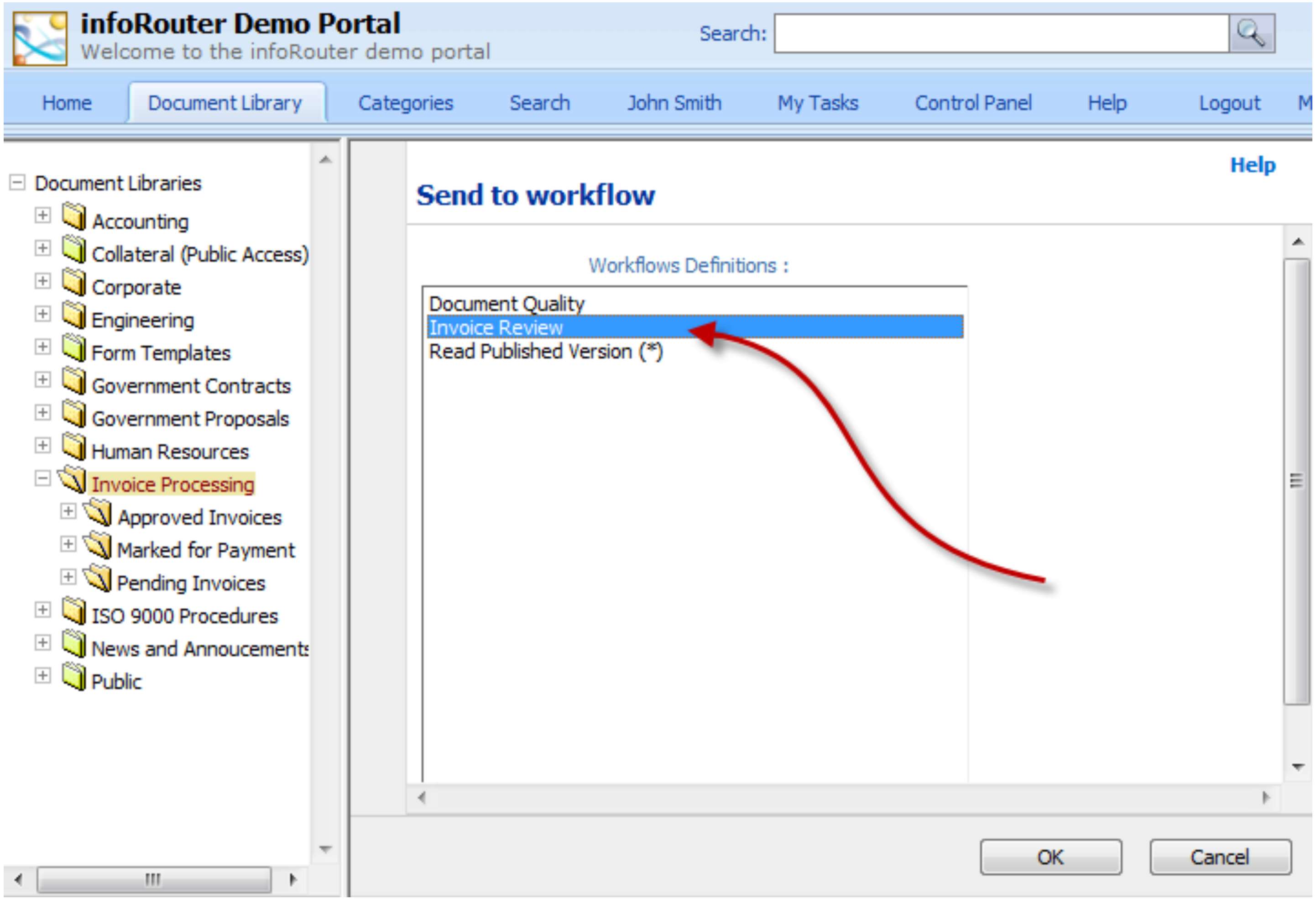
Workflow Steps and Tasks - Invoice Review

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

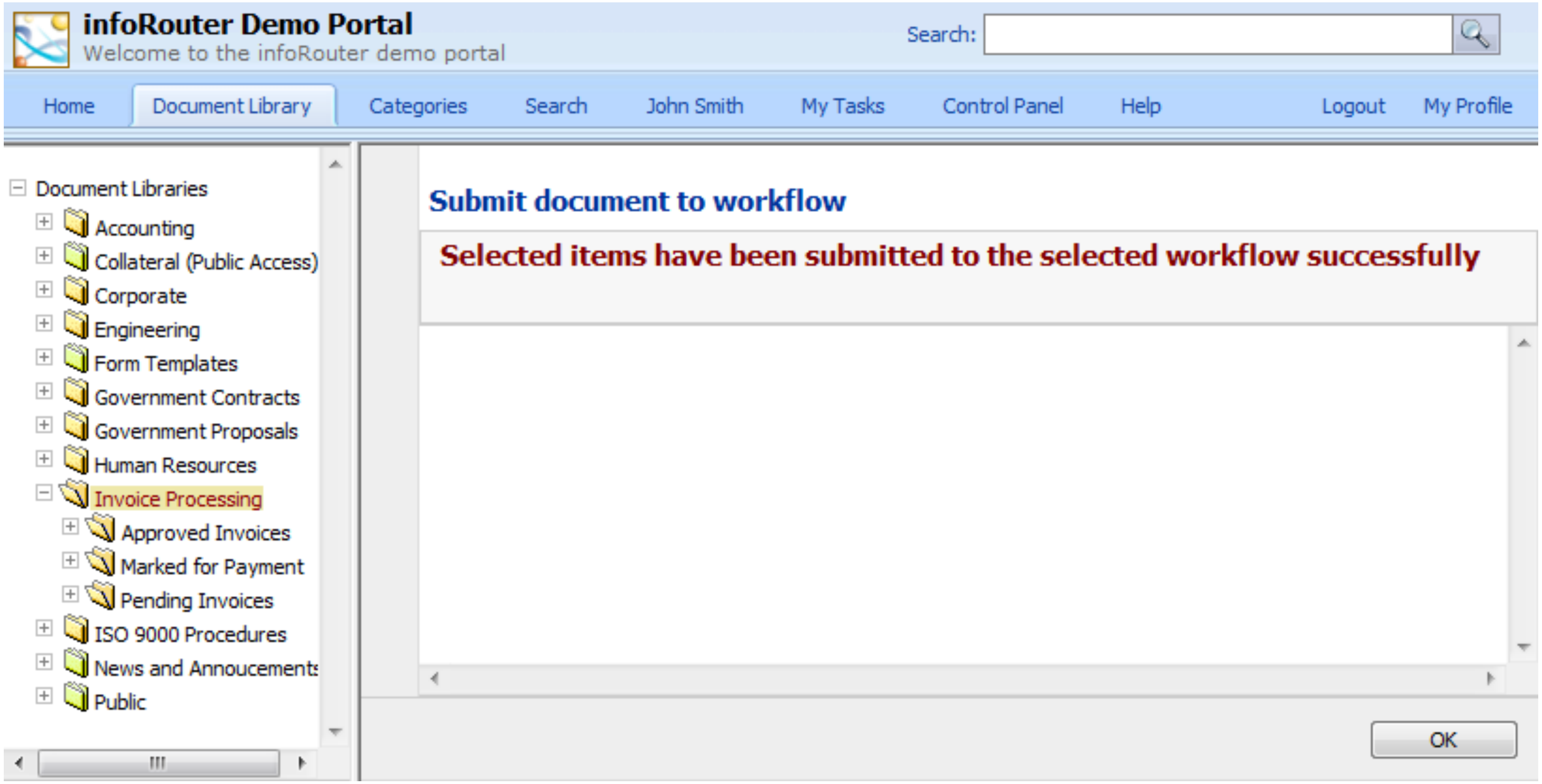
Navigate to the document library and pick an invoice document to "send to workflow" using the pop-up menu



Select the workflow we just created and click ok.

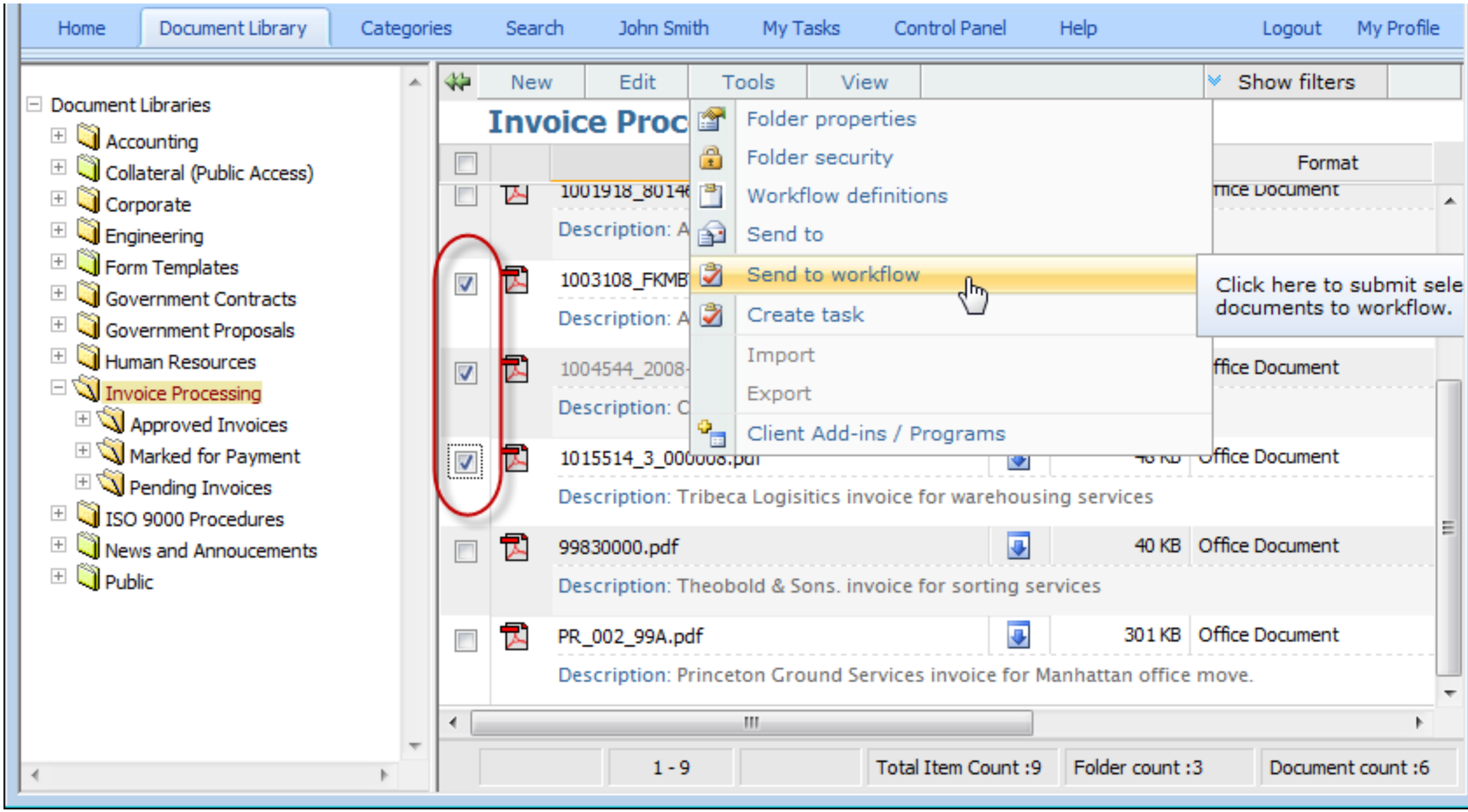


The document has now been submitted to the “Invoice Review” workflow.



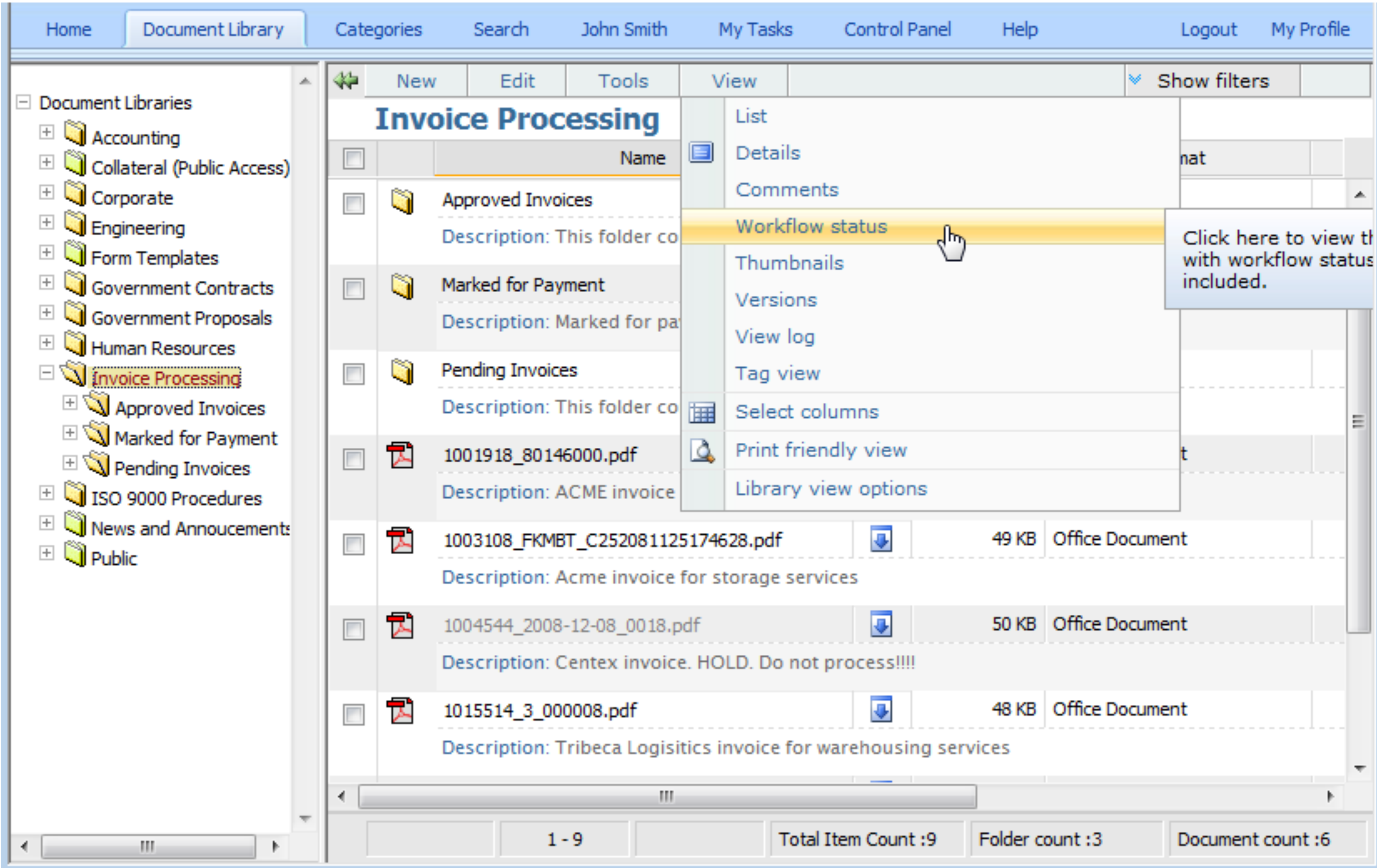
You could have just as easily selected more than one invoice. Submission to workflow can be done for multiple documents.

Sending multiple documents to workflow

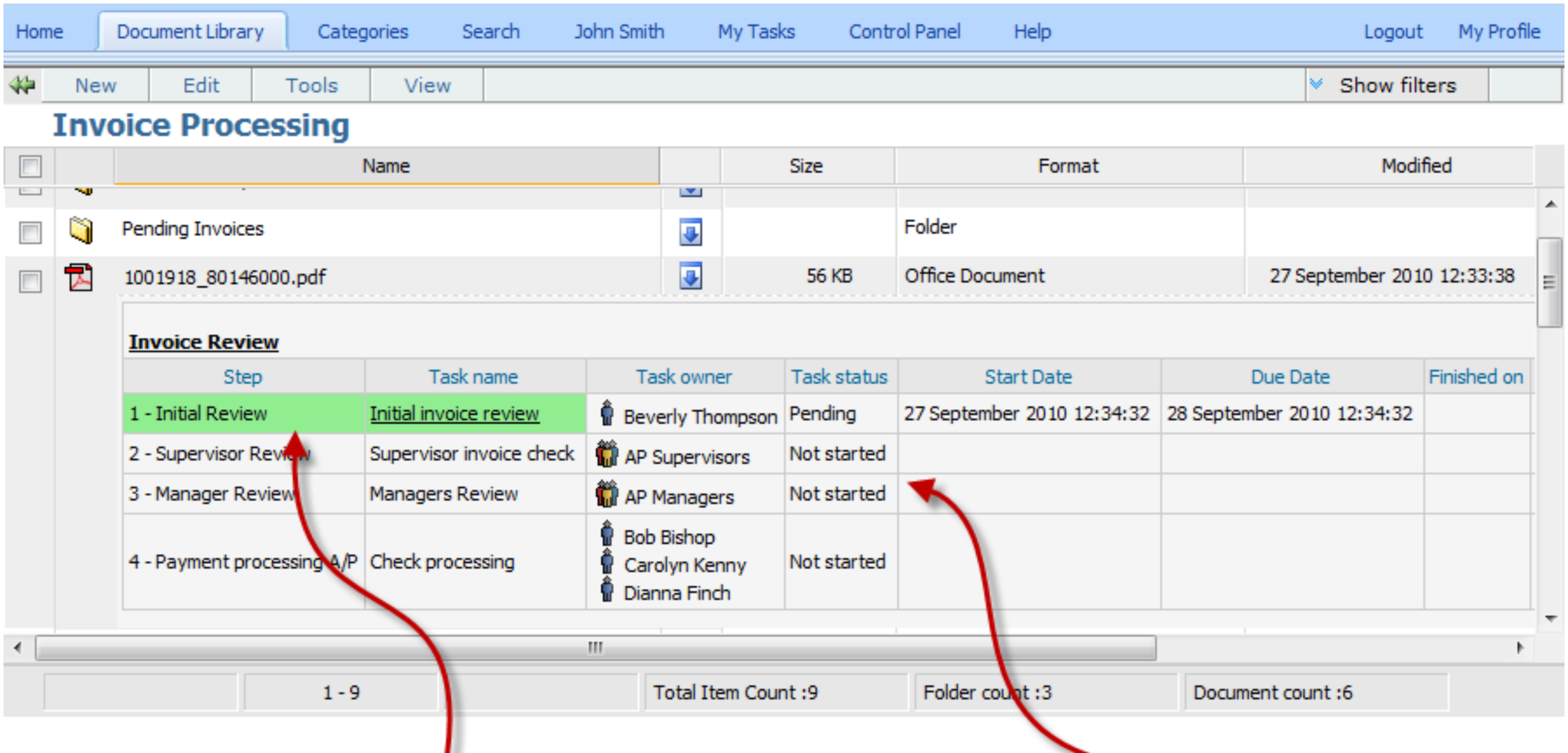


Select multiple documents and choose the “Send to workflow” menu from the tools menu.

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



“Workflow Status” view mode.

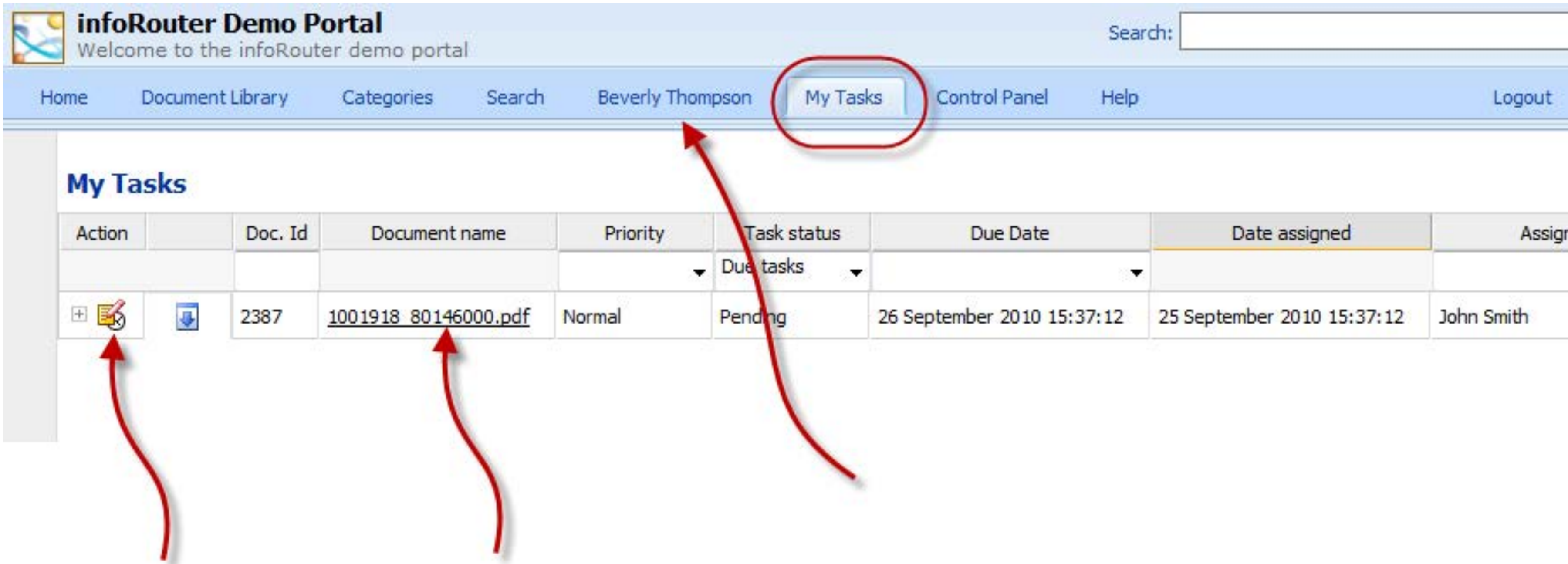


The active step/task appears in green.

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?

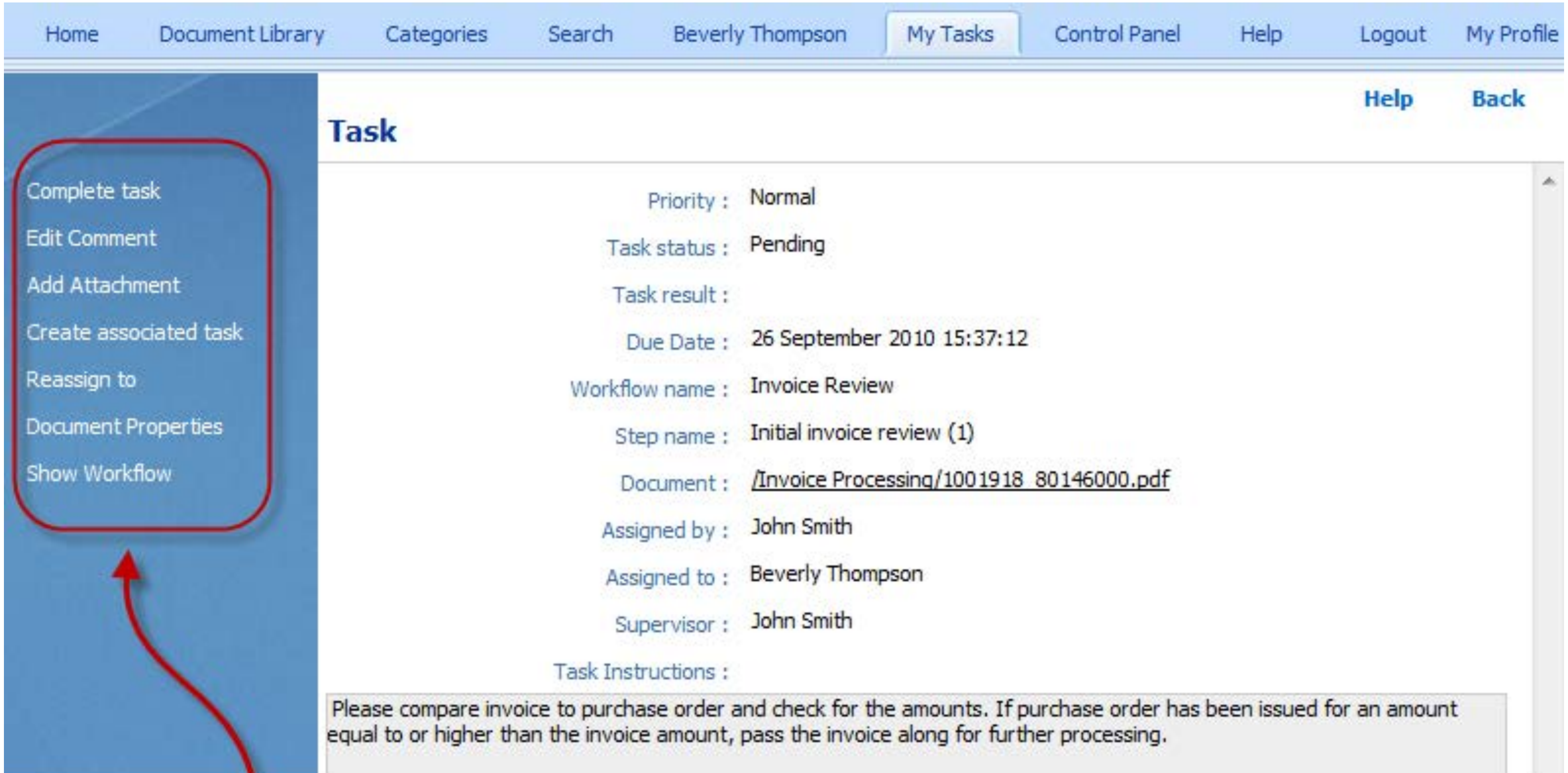
Beverly Thompson received an email from infoRouter indicating that she had been assigned a task
She then logged on to infoRouter and clicked on “My Tasks” to see the task



The 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

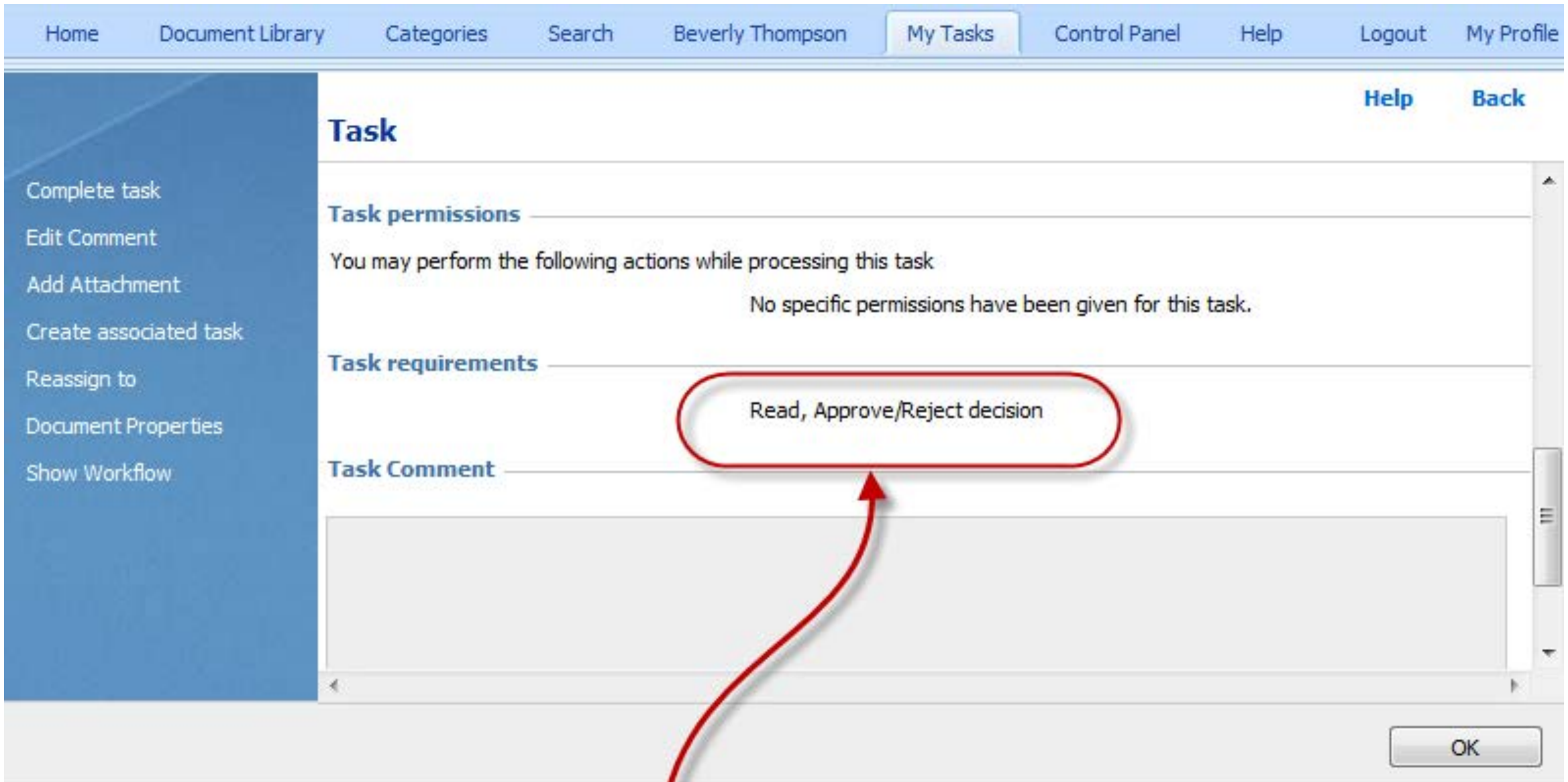


A list of things the assignee can do.

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

See the Permissions & Requirements section.

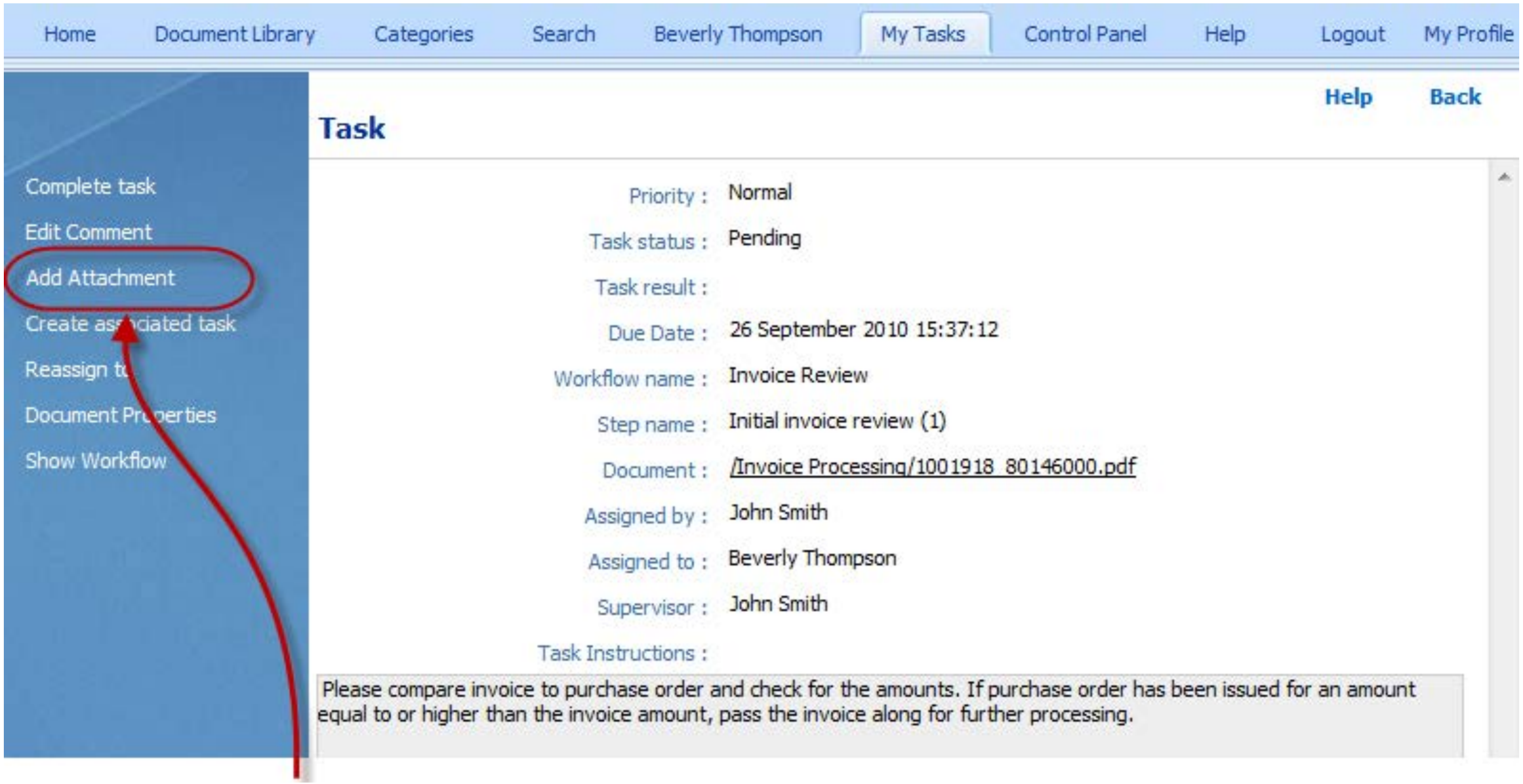
The “Task” window (continued)



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

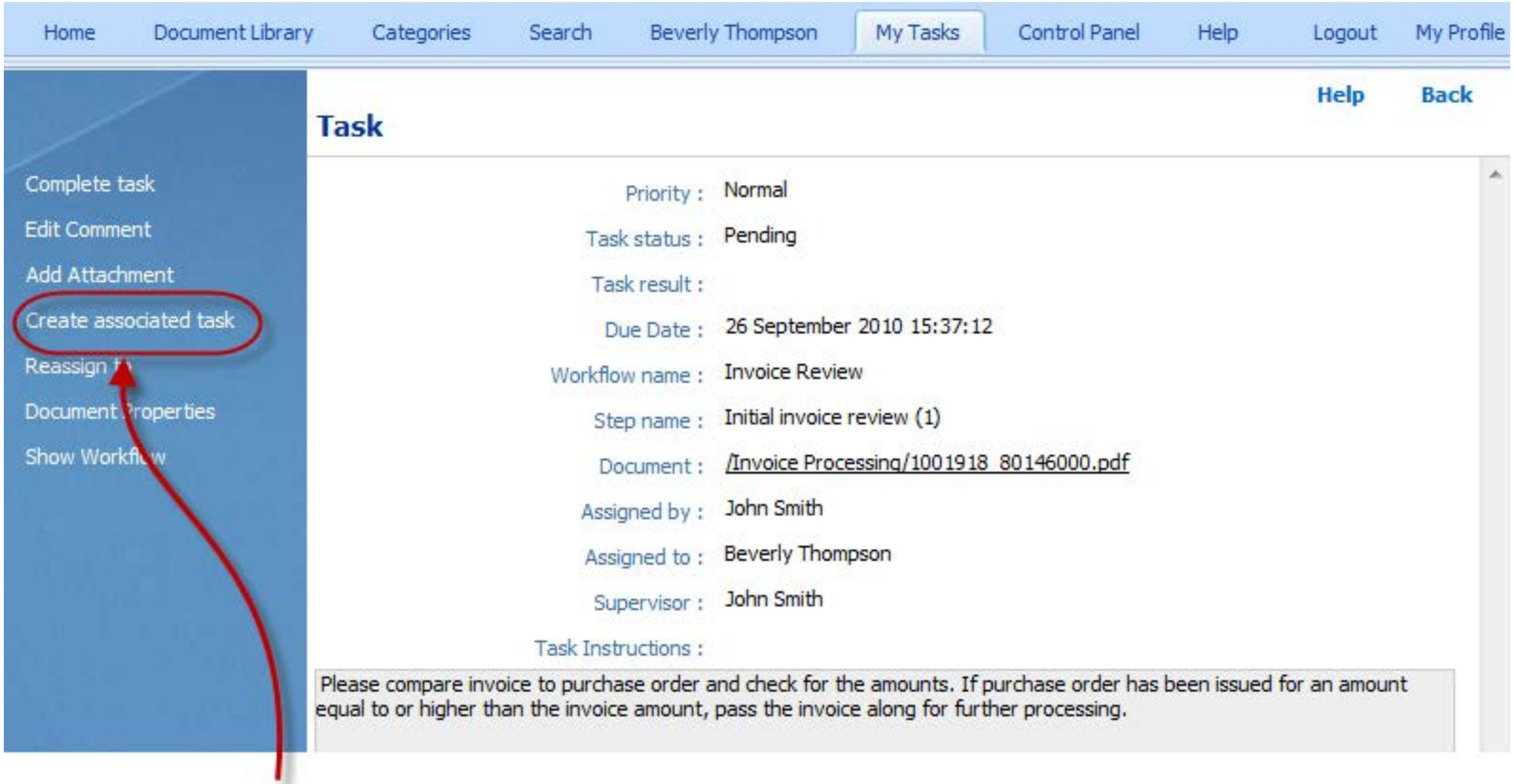
“Approve” advances to the next step, “Reject” always ends the workflow.

Adding attachments



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

Creating Associated Tasks (Ad-hoc tasks)



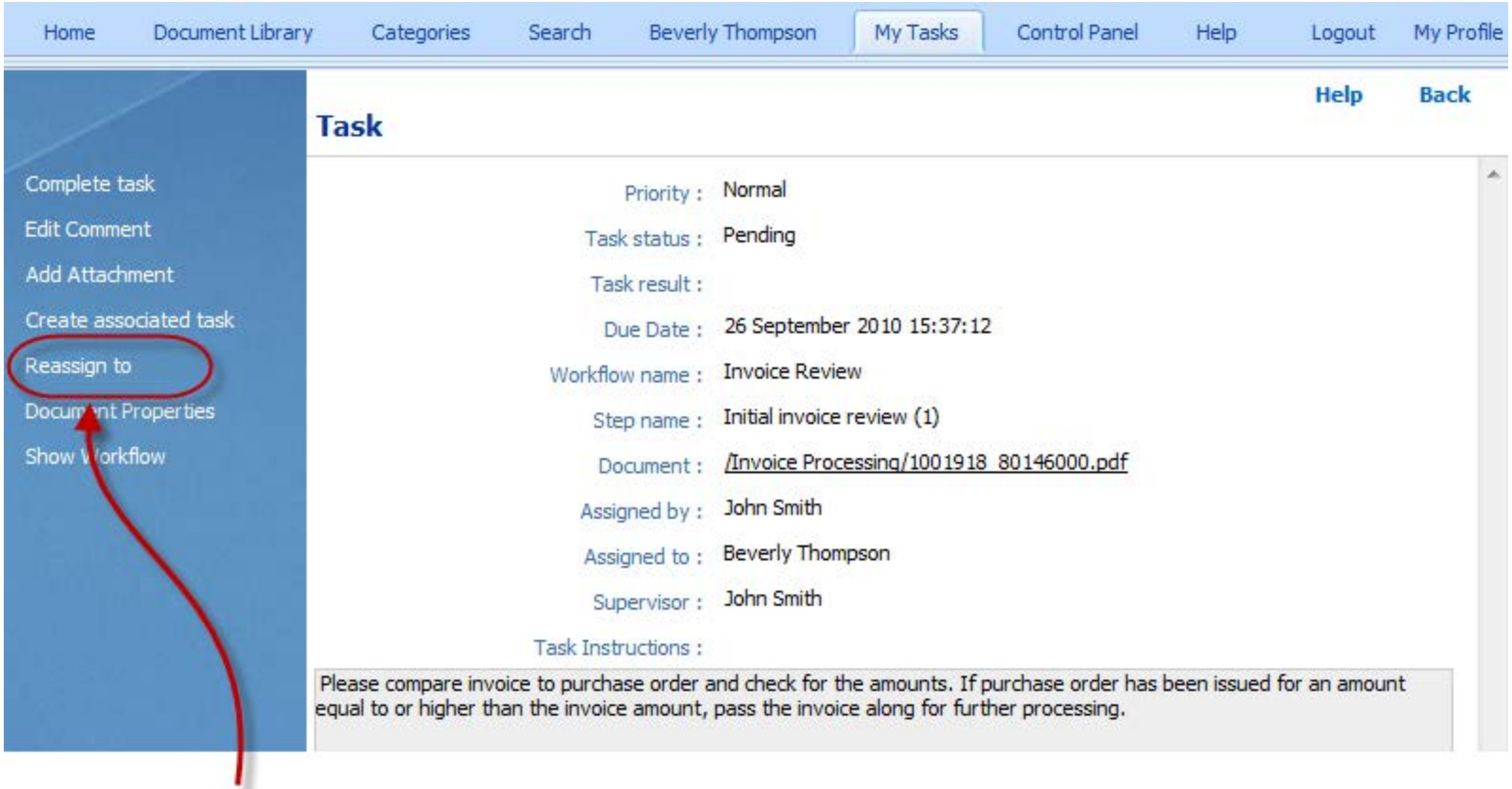
The assignee may also decide to create an associated task.

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



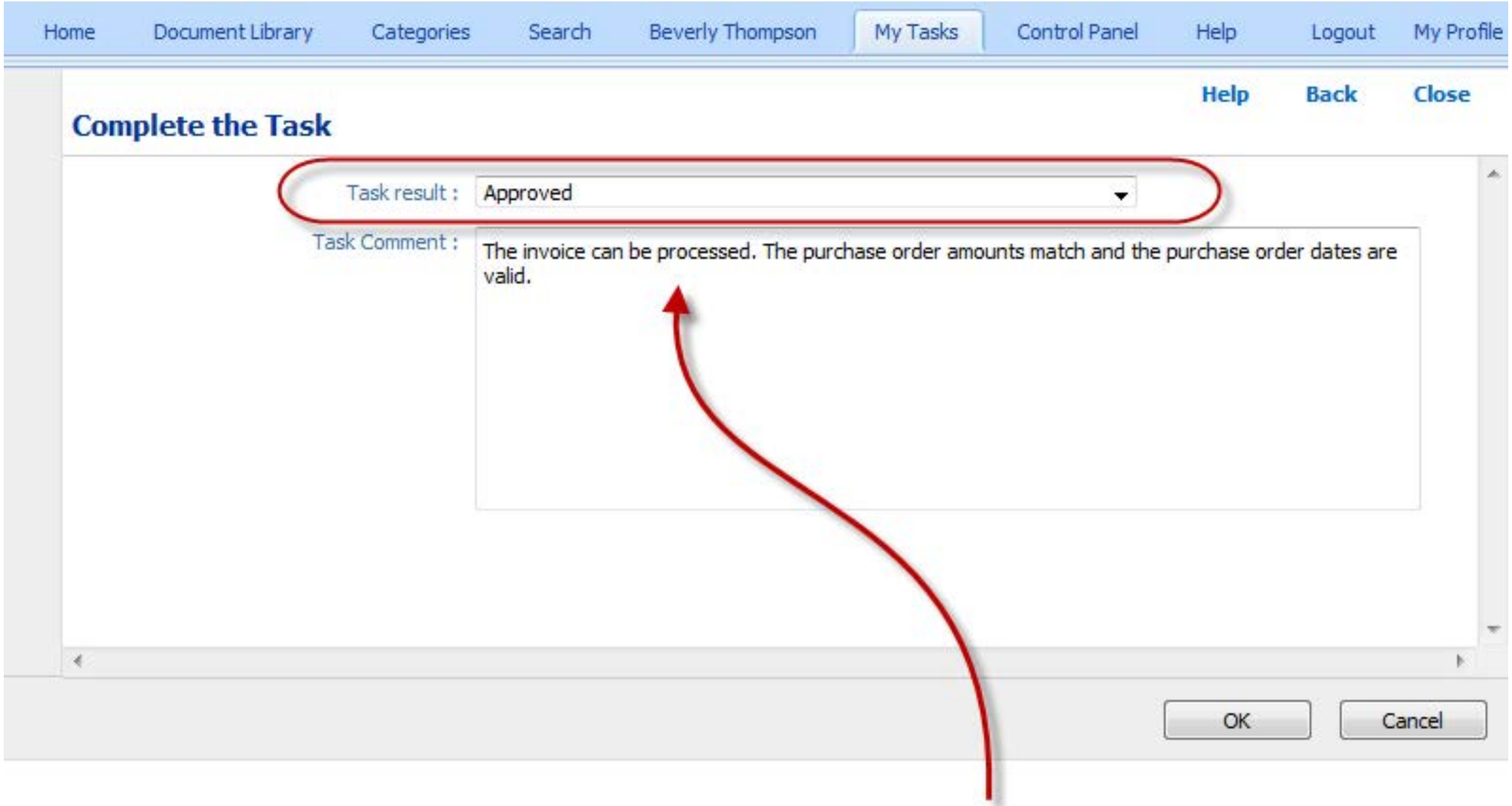
The assignee may decide that the assigned task would best be carried out by another user. The "reassign to" link does just that.

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.

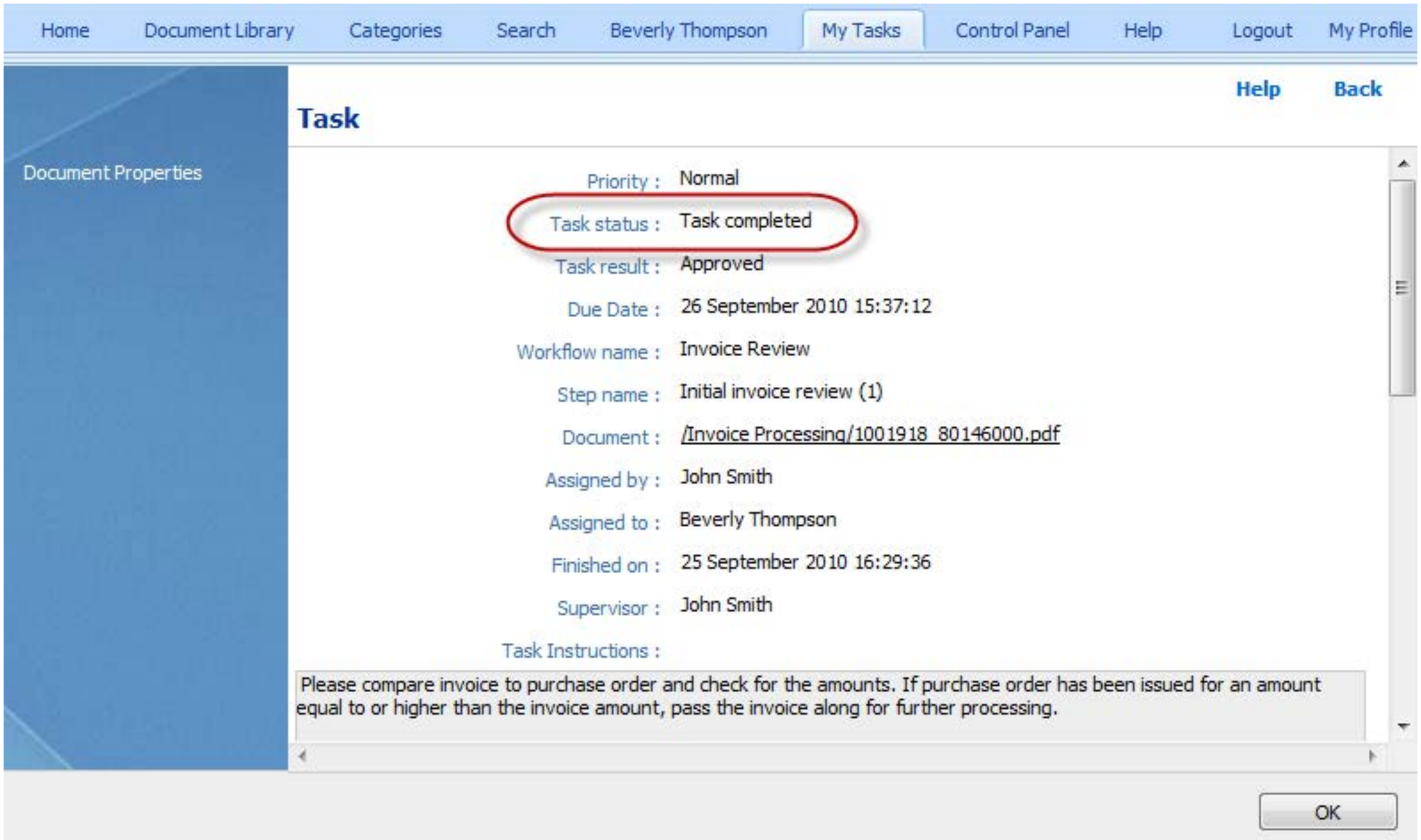
Completing the “Task”

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

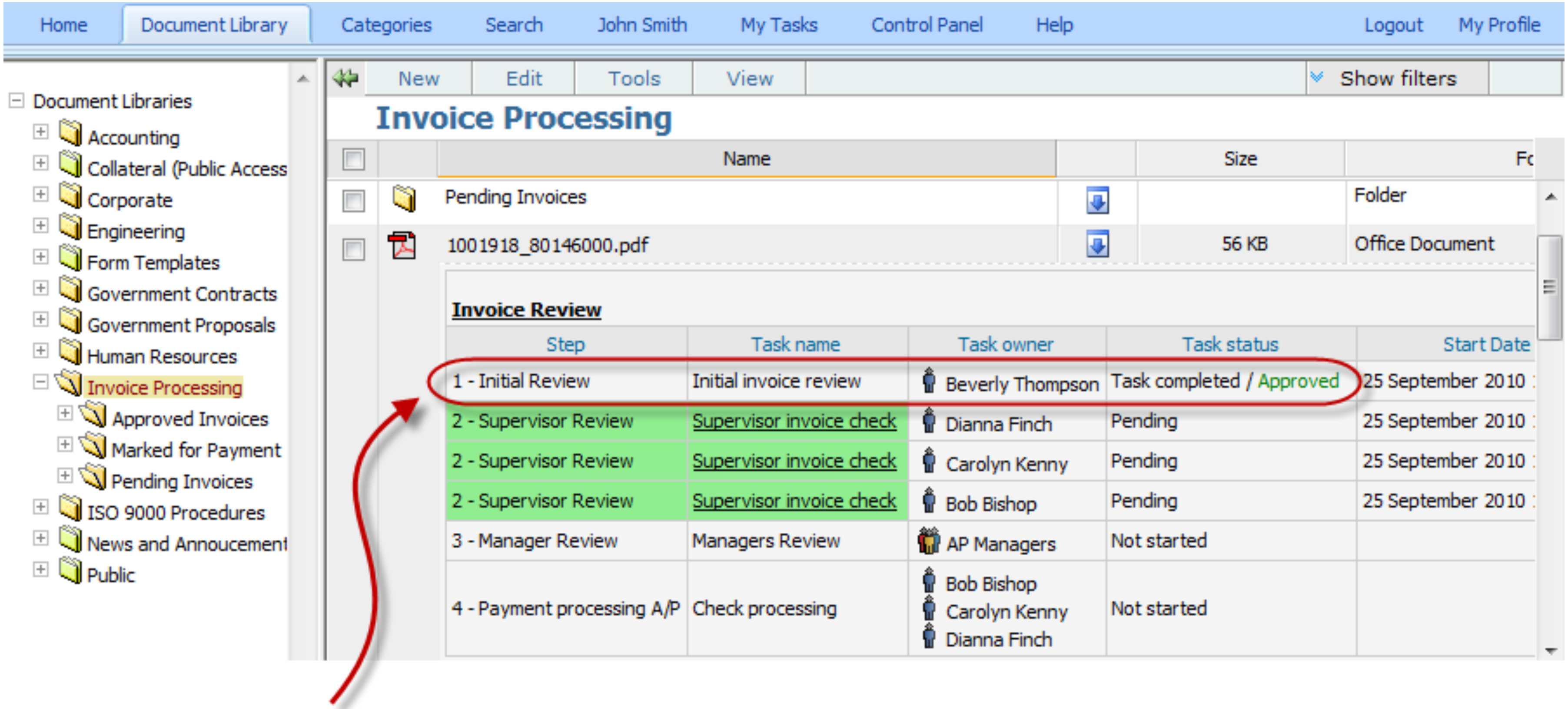


In this example, the assignee must choose between Approve and Reject and provide a reason before the task can be marked as “completed”

The task has been completed



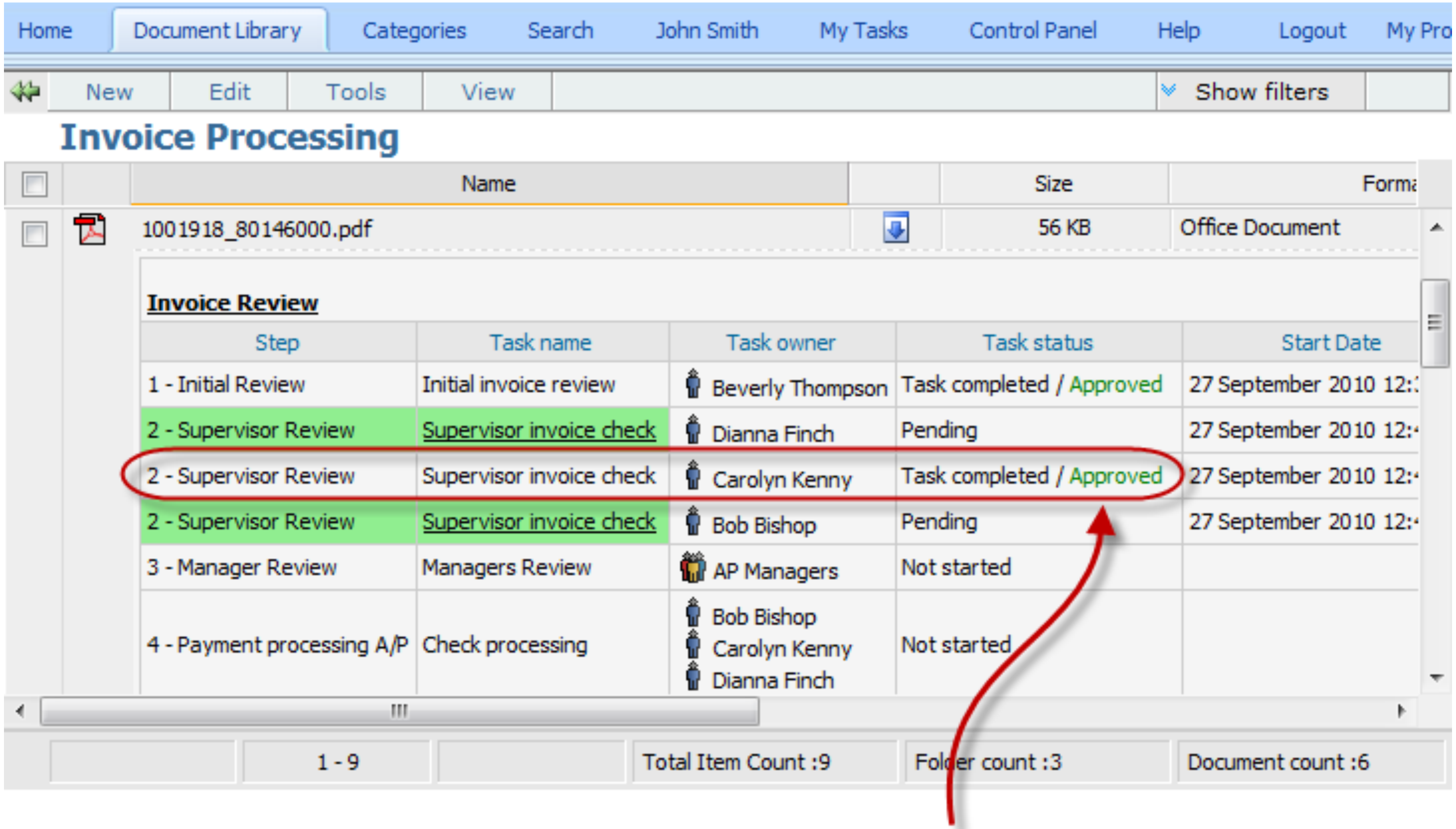
Workflow progression



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

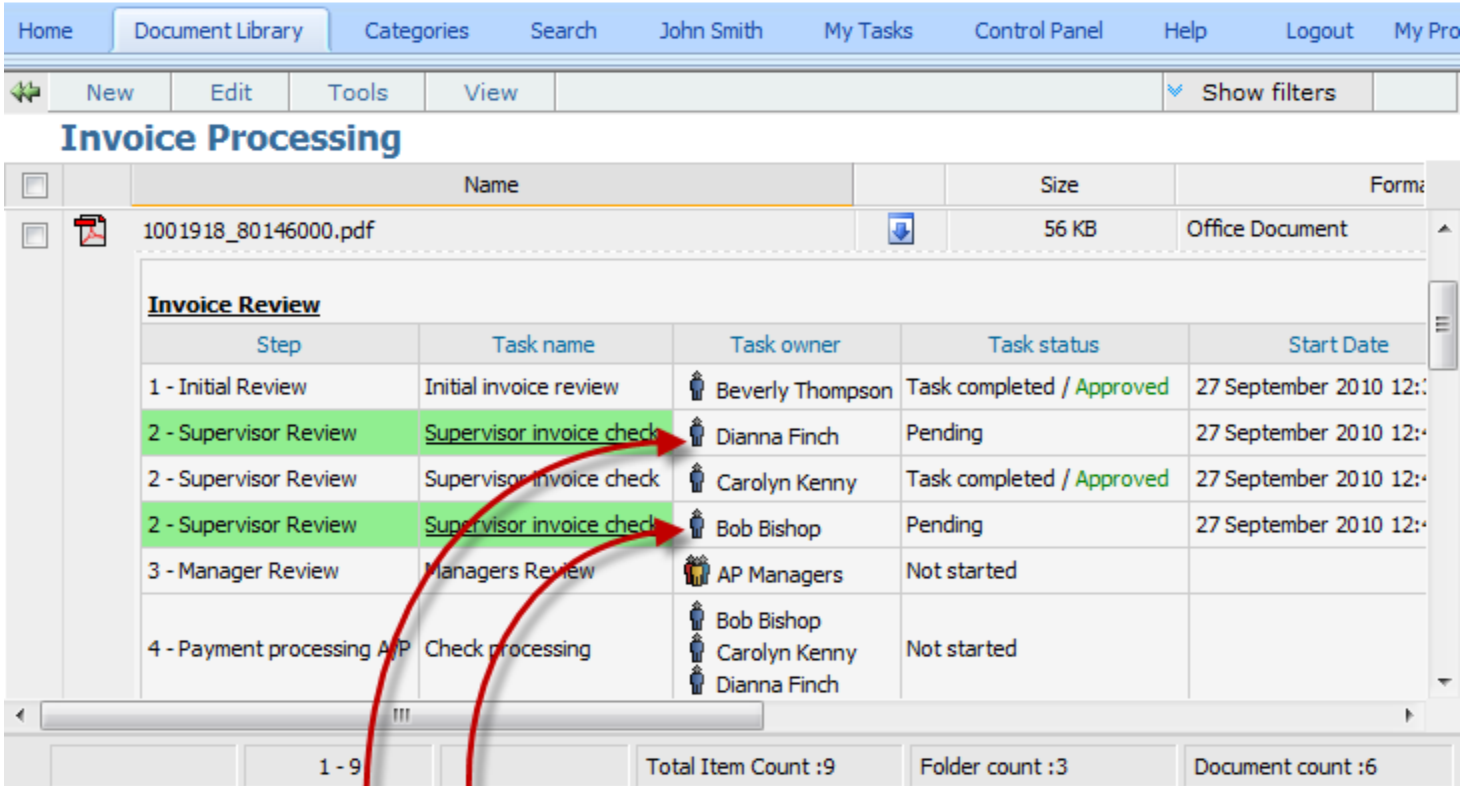


Notice that the 3rd step has not been activated. Dianna and Bob must complete their tasks before the workflow continues to step 3.

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

Carolyn has approved the invoice for further processing.

Workflow progression



Important Note:

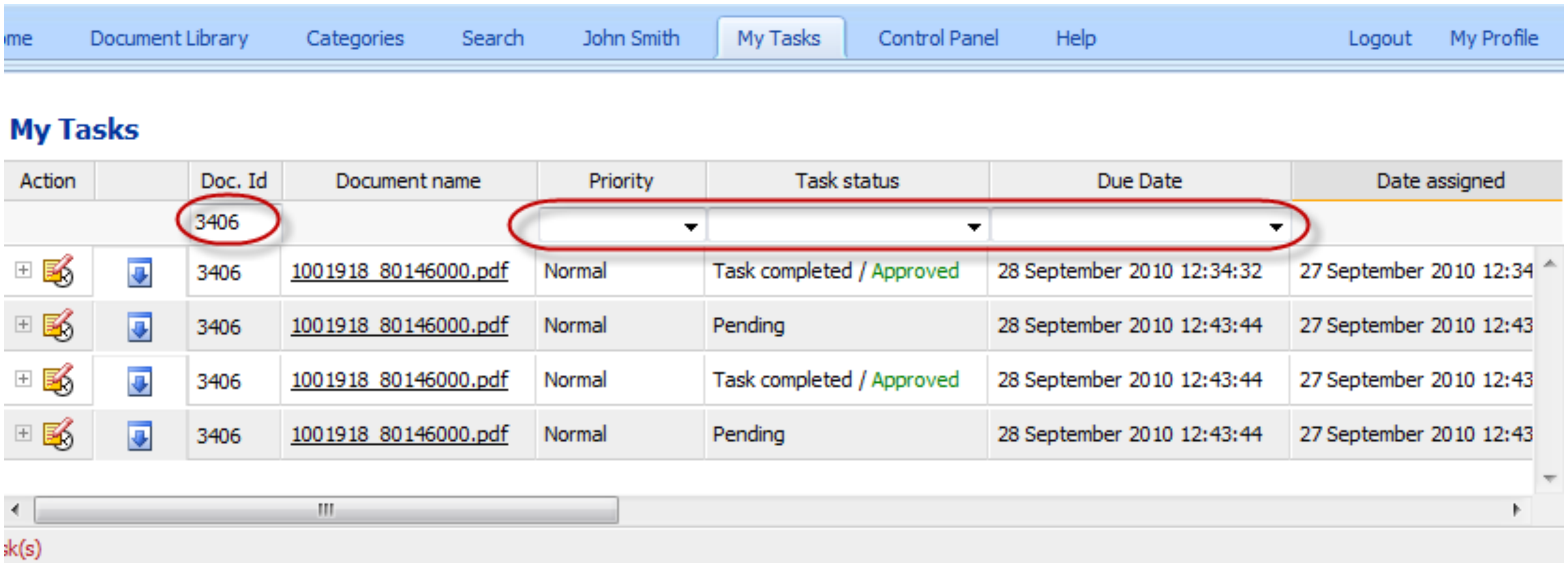
The task has been designed to require an Approve/Reject decision.

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.

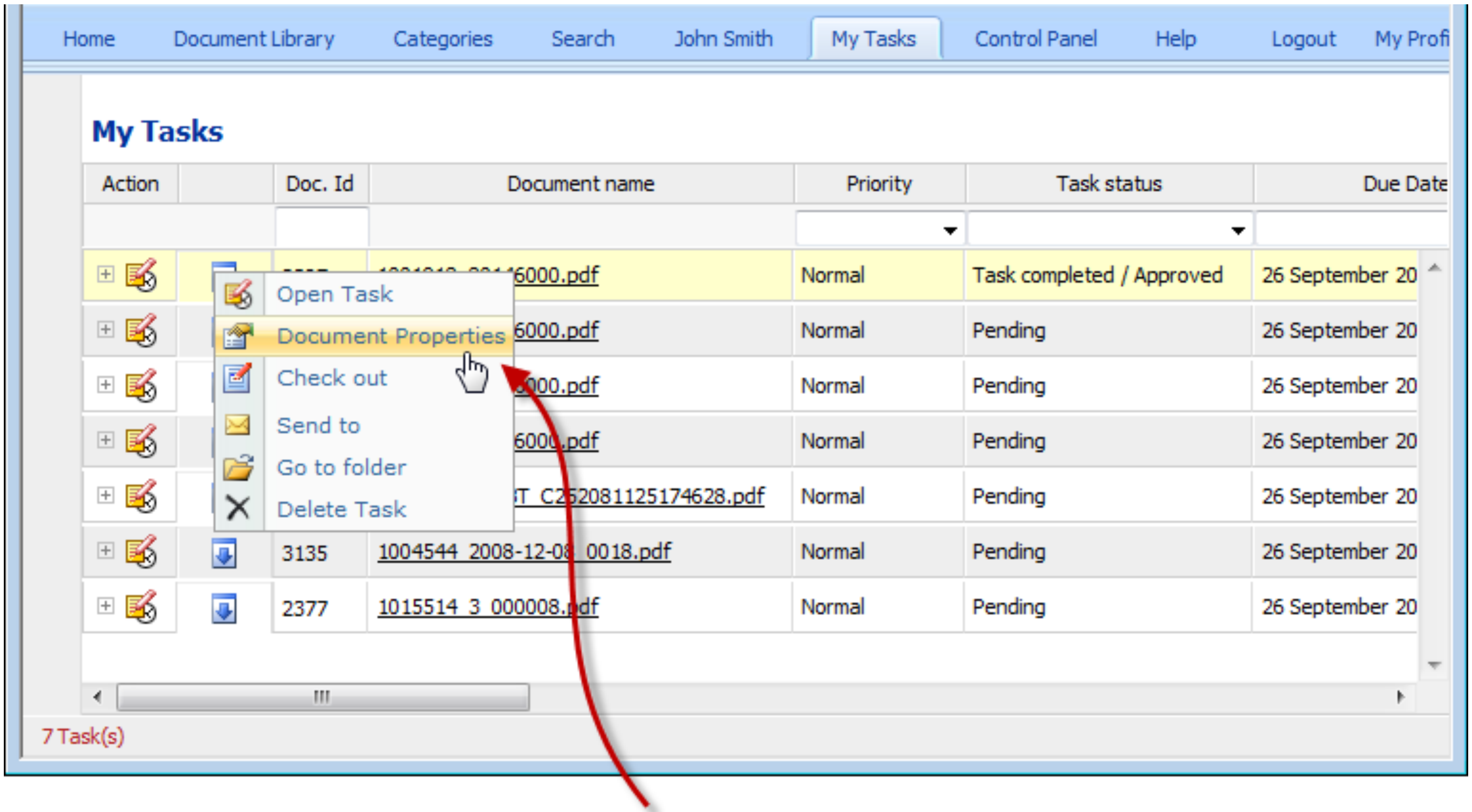
Checking the status of pending Tasks & Workflows



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

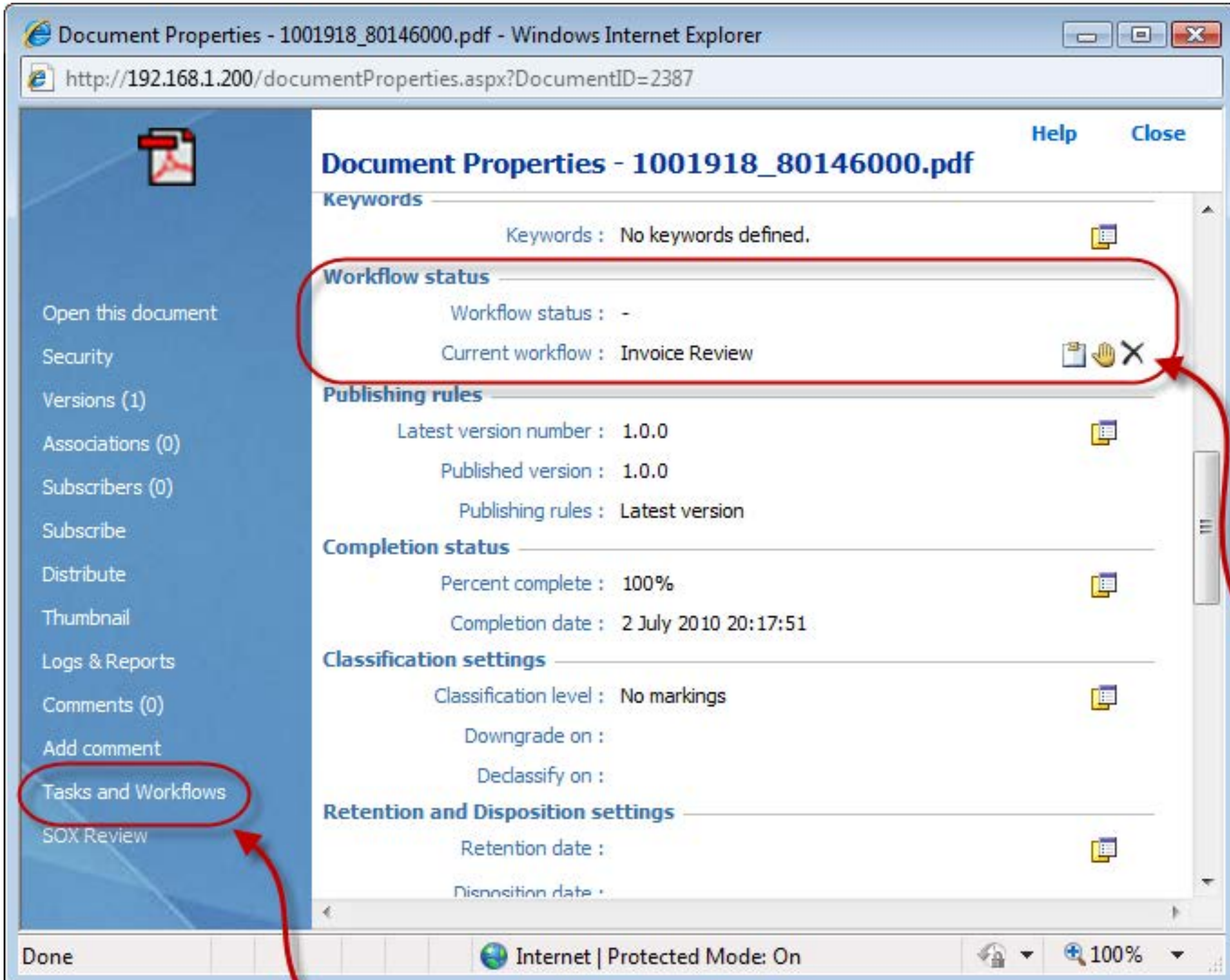
Example: You may just wish to list those tasks that are “Overdue”.

The “My Tasks” screen



The 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