



infoRouter ISO/Periodic Reviews & Sunsetting

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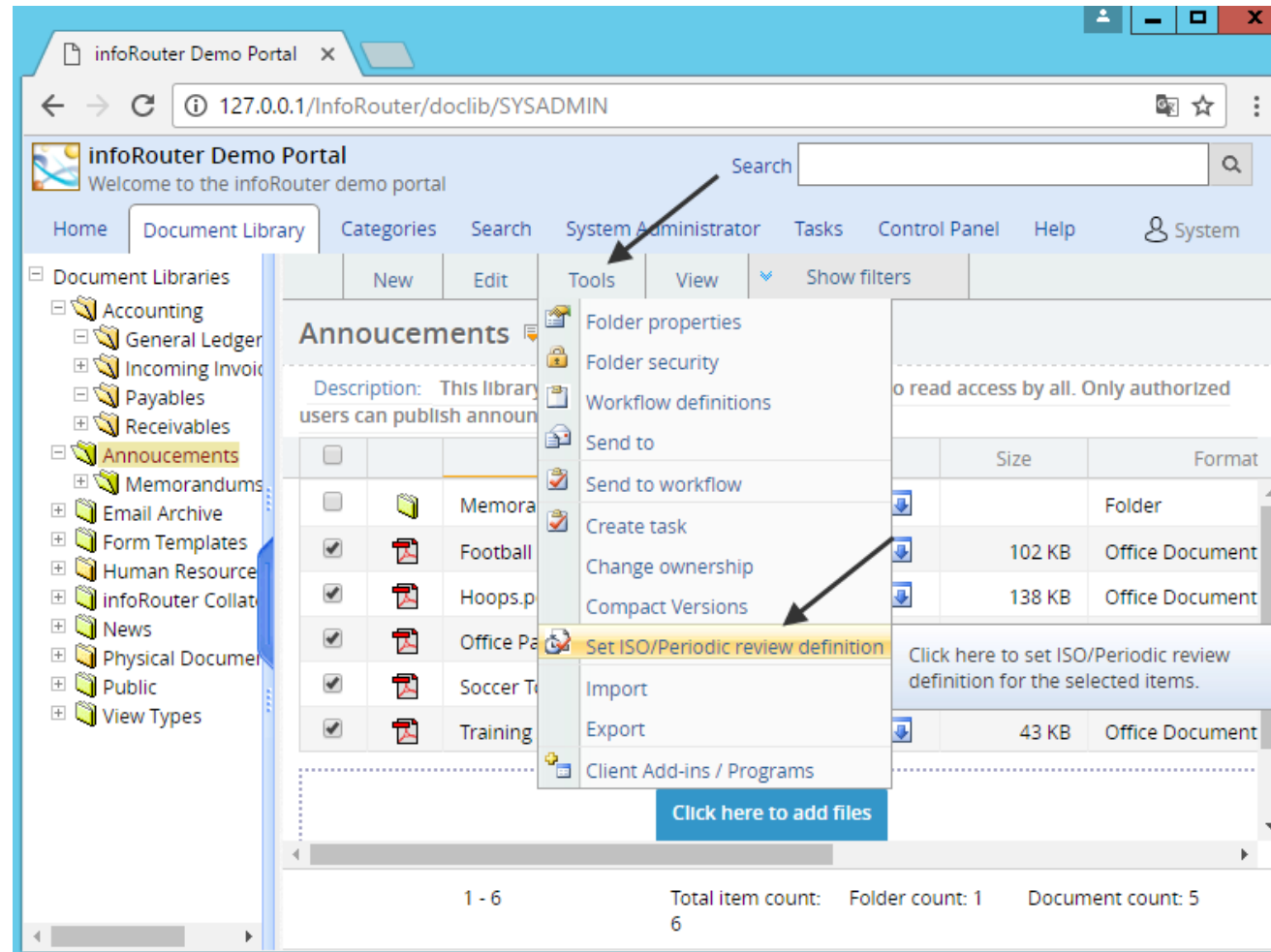
Recurring Reviews/Tasks

Creating recurring tasks & workflows using the ISO Periodic Review feature:

In cases where a document must be reviewed on a recurring basis such as ISO procedures or just to check if a document is still valid, this new feature comes very handy.

You can create a single task and assign it to either document owners or a single selected user.

In cases where the document must go through a thorough examination by multiple users, you can choose to submit the document to a workflow on a recurring basis.



Select documents and choose “Set ISO/Periodic Review Definition” from the “Edit” menu

ISO/Periodic review - Google Chrome

127.0.0.1/InfoRouter/EditISOOptions.aspx

Help

ISO/Periodic review

Selected document count : 5

Schedule :

Frequency: Monthly

Start date: 1 December 2017 0 : 0 : 0 Today

Day 1 of every 1 month(s)

The First Sunday of every 1 month(s)

Review Method : Create task Start a ISO/Periodic review workflow

Assign to : Document owner

Task Instructions :

Deadline : Day(s) Hours

Priority : High

Task permissions

OK Cancel Close

Set the frequency and schedule for the periodic review. Notice that the task is going to be assigned to the “Document Owner”. So, if you select multiple documents, each belonging to a different author, the documents will be assigned to their respective owners.

ISO/Periodic review - Google Chrome

127.0.0.1/InfoRouter/EditISOOptions.aspx

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Assign to : Document owner

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Deadline : Day(s) Hours

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Task permissions

OK Cancel Close

Choose “Start an ISO/Periodic review workflow” if you wish to kick off a pre-defined workflow on a recurring basis. The selected workflow can be an ordinary workflow with one or more steps. When this option is selected, a drop-down list will show all available workflows.

Document Properties - Football Party.pdf - Google Chrome

127.0.0.1/InfoRouter/DocumentProperties.aspx?DocumentID=11279

Document Properties - Football Party.pdf

Retain until :
Disposition date :
R&D status :
Set R&D schedule

Expiration
Expiration date :
Set expiration date

ISO/Periodic review

Workflow name :	Test
Schedule :	Day 1 of every Month, Starting on: 1 December 2017
Last ISO/Periodic review date :	
Next ISO/Periodic review date :	1 December 2017

Set ISO/Periodic review definition Remove ISO/Periodic Review definition

The document properties window of documents that have been submitted to ISO/Periodic reviews will contain the section outlined in the above image. The “Last” and “Next” review dates will also be indicated

Document Properties - Football Party.pdf - Google Chrome

127.0.0.1/InfoRouter/DocumentProperties.aspx?DocumentID=11279

Document Properties - Football Party.pdf

Retain until :
Disposition date :
R&D status :

Set R&D schedule

Expiration

Expiration date :

Set expiration date

ISO/Periodic review

Workflow name : Test
Schedule : Day 1 of every Month, Starting on: 1 December 2017
Last ISO/Periodic review date :
Next ISO/Periodic review date : 1 December 2017

Set ISO/Periodic review definition Remove ISO/Periodic Review definition

Open this document
Security
Versions 1
Associations 0
Subscribers 0
Subscribe
Distribute
Thumbnail
Logs & reports
Tasks and workflows
Comments 0
Sox Review Log
ISO/Periodic Review Log

The “ISO/Periodic Review Log” section of the document properties window contains a list of audit reports. One such report will be the ISO/Periodic review logs.

This report will show every instance of when this document has been reviewed including task owner’s comments.