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WORKFLOW INBOX

Each user has a Workflow Inbox. When a task is assigned to a user, it is written to that user's Inbox. When a task is assigned to a group or position, the task is written to all users who are a member of that group or position. The Inbox displays all tasks that need to be worked. These are tasks with a task status of Assigned, Started or Put Back. Tasks.

To access the Workflow Inbox, the user selects Inbox from the Main Menu as shown in **Figure 1**.

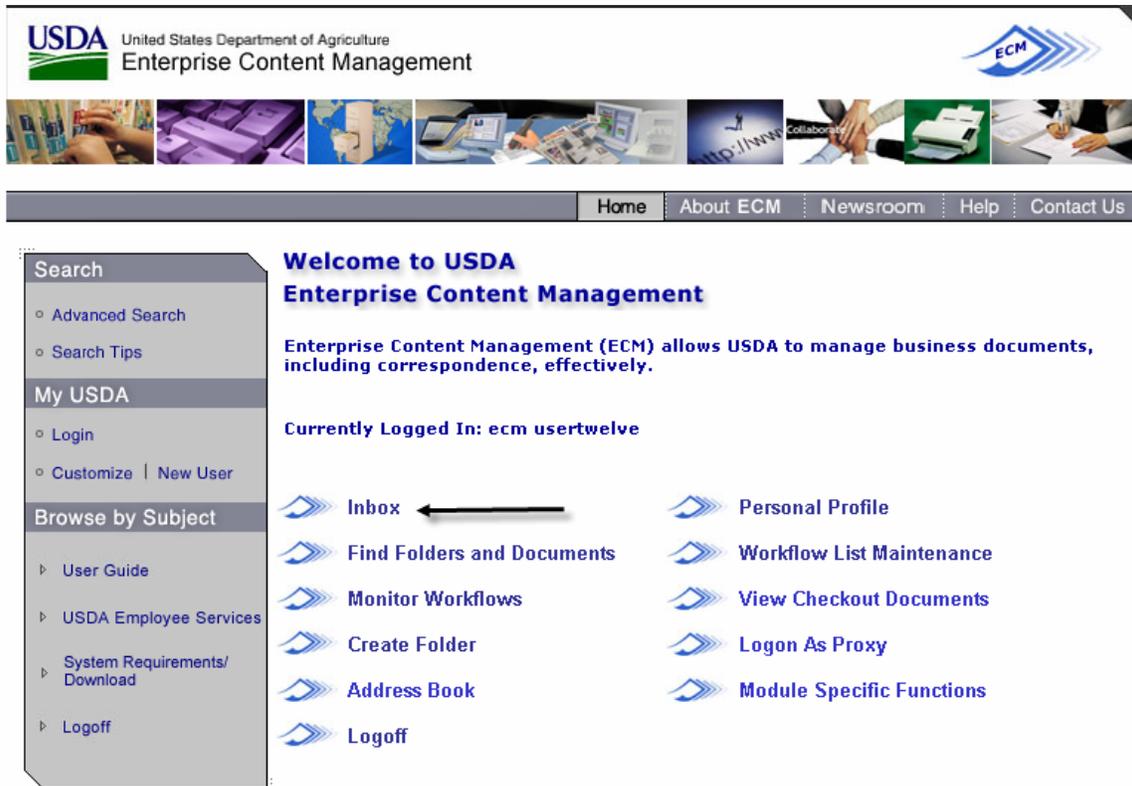


Figure 1: Workflow Inbox on the Main Menu

The Workflow Inbox screen shown in **Figure 2** shows all Personal and Group tasks for Correspondence Management assignments for the user. When a task is assigned to a group, all members of the group receive the task in their inbox. When one of the group members selects the task, the task is assigned to them to complete. The actual user field is formatted with the user's name who selected the task. The task is removed from the other members' inboxes and the status of the task is changed from 'Assigned' to 'Started'.

The example in **Figure 2** shows several tasks for the user. The status of some of the tasks is 'Assigned'. This means that the task has been added to the assignees' Inbox but it has not yet been selected to be worked. If the user starts a task and then chooses to put it back into the system, the status changes to 'Put Back' and will be tracked for reporting purposes.

Overdue tasks are shown in red. The Over/Under field shows the number of business days the task is over or under the due date.

Currently Logged In: ecm userfifteen Return To: Main Menu | Inbox August 24, 2006

Workflow Inbox

Module: All Modules **Tasks:** Any
Assignee: Personal and Group Tasks **Status:** Any
Task Description: All Tasks **Special:** Any
Sort By: Due Date Ascending
Display Count: 20

ID	Task	Received	Due Date	O/U	Organization	Assignee	Organization	Actual User	Status	FYI
1	eturn	04/11/2005	05/09/2005	+...	OSEC/OES/None...	ecm userfifteen	OSEC/OES/None...	ecm userfifteen	Started	N
2	der	05/17/2006	05/18/2006	+70	OSEC/OES/None...	Main Group			Assigned	N
3	der	05/17/2006	05/18/2006	+70	OSEC/OES/None...	Main Group			Assigned	N
4	der	05/17/2006	05/18/2006	+70	OSEC/OES/None...	Main Group			Assigned	N
5	der	05/17/2006	05/18/2006	+70	OSEC/OES/None...	Main Group			Assigned	N
6	n	05/23/2006	05/24/2006	+66	OSEC/OES/None...	Main Group	OSEC/OES/None...	ecm userfifteen	Started	Y
7		05/23/2006	05/24/2006	+66	OSEC/OES/None...	Main Group			Assigned	N
8	6	05/23/2006	06/01/2006	+60	OSEC/OES/None...	Main Group			Assigned	N
9	der	08/03/2006	08/04/2006	+14	OSEC/OES/None...	Main Group	OSEC/OES/None...	ecm userthirteen	Put Back	N

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Folder Owner: **Mission/Staff:**
Folder Owner Phone: **Agency:**
Folder Owner E-Mail: **Division:**
Subject: **Group:**

Quick Print

Figure 2: Workflow Inbox

SORTING

The tasks in **Figure 2** are sorted by Due Date in ascending order. A drop-down menu contains different options for sorting in either ascending or descending order. The results list may be further sorted by clicking on any of the column headings (ID, Proc code, ! etc.). Clicking the same heading a second time changes the sort order (e.g. from Ascending to Descending).

The Display Count field shows the number of tasks that will be displayed per page. It may be changed by the user to display from 1 to 100. Increasing the number displayed will take longer for the Inbox to be displayed.

The width of a column can be changed to make it wider or more narrow. Place the cursor on the line between the column headings. The cursor becomes a two headed arrow. By holding down the left mouse key and dragging the cursor to the left or right, the column is resized. This helps when reading the contents of a column or when using the print function to create reports.

FOLDER DETAILS

To see more details for a task, the user can highlight the task. The Folder fields in the panel below are then populated as shown in **Figure 3**.

Workflow Inbox

Module: **Tasks:**
Assignee: **Status:**
Task Description: **Special:**
Sort By: **Ascending**
Display Count:

ID	Proc ...	Application	Category	Task	Received	Due Date	O/U	Organization	Assignee	Organization	Actual User	Status	FYI
1	4402	RDTest	Correspo...	Set U...	08/03/2...	08/04/2...	+16	OSEC/RD/...	Main Gr...	OSEC/RD/...	ecm userone	Started	N
2	4403	RDTest	Correspo...	Set U...	08/03/2...	08/04/2...	+16	OSEC/RD/...	Main Gr...	OSEC/RD/...	ecm userone	Started	N
3	4404	RDTest	Correspo...	Set U...	08/03/2...	08/04/2...	+16	OSEC/RD/...	Main Gr...	OSEC/RD/...	ecm userone	Started	N
4	4405	RDTest	Correspo...	Set U...	08/03/2...	08/04/2...	+16	OSEC/RD/...	Main Gr...	OSEC/RD/...	ecm userone	Started	N
5	4410		Correspo...	Set U...	08/03/2...	08/04/2...	+16	OSEC/RD/...	Main Gr...	OSEC/RD/...	ecm userone	Started	N
6	4411		Correspo...	Set U...	08/03/2...	08/04/2...	+16	OSEC/RD/...	Main Gr...	OSEC/RD/...	ecm userone	Started	N

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Folder Owner: Main Group **Mission/Staff:** RD
Folder Owner Phone: 301-751-2509 **Agency:** None
Folder Owner E-Mail: Michael.Muth@usda.gov **Division:** None
Subject: **Group:** Main Group

Quick Print

Figure 4: Workflow Inbox – Executive Review

The Executive Review is shown in **Figure 5:**

Actions <input type="button" value="Record Decision"/> <input type="button" value="Open Folder"/> <input type="button" value="Put Back"/> <input type="button" value="Close"/>	Folder Owner: <input type="text" value="Main Group"/>	Status: <input type="text" value="Active"/>
	Control Number: <input type="text" value="4405"/>	Proc Code: <input type="text" value="RDTest"/>
	Mission/Staff: <input type="text" value="Rural Development"/>	Agency: <input type="text" value="None"/>
	Division: <input type="text" value="None"/>	Group: <input type="text" value="Main Group"/>
	Correspondent: <input type="text" value="0"/>	Date on Letter: <input type="text"/>
Addressee: <input type="text" value="0"/>	Received Date: <input type="text" value="08/03/2006"/>	
Referrer: <input type="text" value="0"/>	Referrer Due Date: <input type="text"/>	
Subject: <input type="text"/>	Synopsis: <input type="text" value="USDA ECM Enhanced Security Model Functional Specification"/>	
Final Signer: <input type="text" value="0"/>	Date Signed: <input type="text"/>	
VIP Type: <input type="text"/>	Special Attention: <input type="text"/>	
Documents <input type="text" value="Incoming"/> <input type="button" value="View Document"/>	Special Instructions: <input type="text"/>	
Reports <input type="button" value="Cover Sheet Report"/>		

Figure 5: Executive Review

The user may view but not change the Folder Details. The Folder Details include information such as Folder Owner, Status, Control Number, and Processing Code.

The actions that can be completed are:

- Record Decision – allows the user to perform such duties as complete the task
- Open Folder – takes the user to the folder
- Put Back – puts the task back into the
- Close – closes the Executive Review and returns the user to the Workflow Inbox

The views that can be seen are:

- Folder Fields - such as synopsis and VIP
- Clearance Signatures – includes approvals and supporting documents
- Folder Notes - notes that have been added to the folder through the Notes Tab
- Workflow Status – the status of the entire workflow as well as the current task

The documents associated to the folder can be viewed by selecting the document from the drop-down box and clicking <View Document>.

The reports available for the folder can be viewed by clicking on the selected report under the 'Reports' heading.

PRINT TASKS

When the Workflow Inbox is first displayed and no tasks have been highlighted, the only active buttons are the 'Print Tasks' button and 'Close' button as shown in **Figure 6**.

Currently Logged In: ecm userfifteen Return To: Main Menu | Inbox August 28, 2006

Workflow Inbox

Module: All Modules **Tasks:** Any
Assignee: Personal and Group Tasks **Status:** Any
Task Description: All Tasks **Special:** Any
Sort By: Due Date Ascending
Display Count: 20

ID	Proc Code	Application	Category	Task	Received	Due Date	O/U	Organization
1	2138	OES53	Correspondence Man...	Subflow Return	04/11/2005	05/09/2005	+...	OSEC/OES/Non
2	4332		Correspondence Man...	Set Up Folder	05/17/2006	05/18/2006	+72	OSEC/OES/Non
3	4336		Correspondence Man...	Set Up Folder	05/17/2006	05/18/2006	+72	OSEC/OES/Non
4	4337		Correspondence Man...	Set Up Folder	05/17/2006	05/18/2006	+72	OSEC/OES/Non
5	4345		Correspondence Man...	Preparation	05/23/2006	05/24/2006	+68	OSEC/OES/Non
6	4345		Correspondence Man...	Task 1	05/23/2006	05/24/2006	+68	OSEC/OES/Non
7	4366	OES99	Correspondence Man...	Set Up Folder	08/03/2006	08/04/2006	+16	OSEC/OES/Non
8	4367	OES44	Correspondence Man...	Set Up Folder	08/03/2006	08/04/2006	+16	OSEC/OES/Non
9	4391		Correspondence Man...	Set Up Folder	08/03/2006	08/04/2006	+16	OSEC/OES/Non

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Folder Owner: **Mission/Staff:**
Folder Owner Phone: **Agency:**
Folder Owner E-Mail: **Division:**
Subject: **Group:**

Quick Print

Figure 6: Workflow Inbox – Print Tasks

All tasks in the Inbox will be displayed as a PDF document that can be printed as is shown in **Figure 7**. The width of a column can be changed to make it wider or more narrow. Place the cursor on the line between the column headings. The cursor becomes a two headed arrow. By holding down the left mouse key and dragging the cursor to the left or right, the column is resized. This helps when reading the contents of a column or when using the print function to create reports.

Workflow Inbox Tasks
08/28/2006

Search Criteria

Application : All **Tasks :** All
Assignee : Personal and Group Tasks **Status :** All
Task Description : **Special :** All

ID	Proc Code	Application	Task	Received	Due Date	O/U	Organization	Assignee	Organization	Actual User	Status	FYI
4403	Test	Correspondence Management	Set Up Folder	08/03/2006	08/04/2006	+16	OSEC/RD/None/None	Main Group	OSEC/RD/None/None	ecm userone	Started	N
4403	Test	Correspondence Management	Set Up Folder	08/03/2006	08/04/2006	+16	OSEC/RD/None/None	Main Group	OSEC/RD/None/None	ecm userone	Started	N
4403	Test	Correspondence Management	Set Up Folder	08/03/2006	08/04/2006	+16	OSEC/RD/None/None	Main Group	OSEC/RD/None/None	ecm userone	Started	N
4403	Test	Correspondence Management	Set Up Folder	08/03/2006	08/04/2006	+16	OSEC/RD/None/None	Main Group	OSEC/RD/None/None	ecm userone	Started	N
4410		Correspondence Management	Set Up Folder	08/03/2006	08/04/2006	+16	OSEC/RD/None/None	Main Group	OSEC/RD/None/None	ecm userone	Started	N
4411		Correspondence Management	Set Up Folder	08/03/2006	08/04/2006	+16	OSEC/RD/None/None	Main Group	OSEC/RD/None/None	ecm userone	Started	N
4508		Correspondence Management	Set Up Folder	08/08/2006	08/09/2006	+13	OSEC/RD/None/None	Main Group			Assigned	N

Figure 7: Workflow Inbox – Print Tasks

PRINT FOLDER

If the Quick Print box is checked, clicking the Print Folder buttons will produce reports based on pre-selected criteria from the User's Personal Profile. See **Figure 8**.

USDA ECMM
COVER SHEET
Control Number: 5000744
07/17/2006

Control Number:	5000744	Status:	Active
Folder Owner:		Processing Code:	
Mission/Staff:	Office of the Executive Secretariat	Agency:	None
Division:	None	Group:	Main Group
Action Organization:			
Mission/Staff:	Office of the Executive Secretariat	Agency:	None
Division:	None	Group:	Folder Setup Group
Correspondent:		Date on Letter:	
Addressee:		Received Date:	08/20/2005
Referrer:		Referrer Due Date:	
Subject(s):			
Synopsis:			
Final Signer(s):		Date Signed:	
VIP Type:		Special Instructions:	
Special Attention:			

#	Actual User / Assignee	Task	Status	Assigned Days	Due Date	Date Received	Date Completed	Days Over Due
1	Ed Koenen OGEC/RD/None/None	Set Up Folder	Started	1	08/22/2005	08/20/2005		+232

Figure 8: Print Folder output

If the Quick Print box is not checked, the user will get a dialog box that shows the printing defaults and allows the user to make modifications as seen in **Figure 9**. The user then clicks the <Start Print> button.

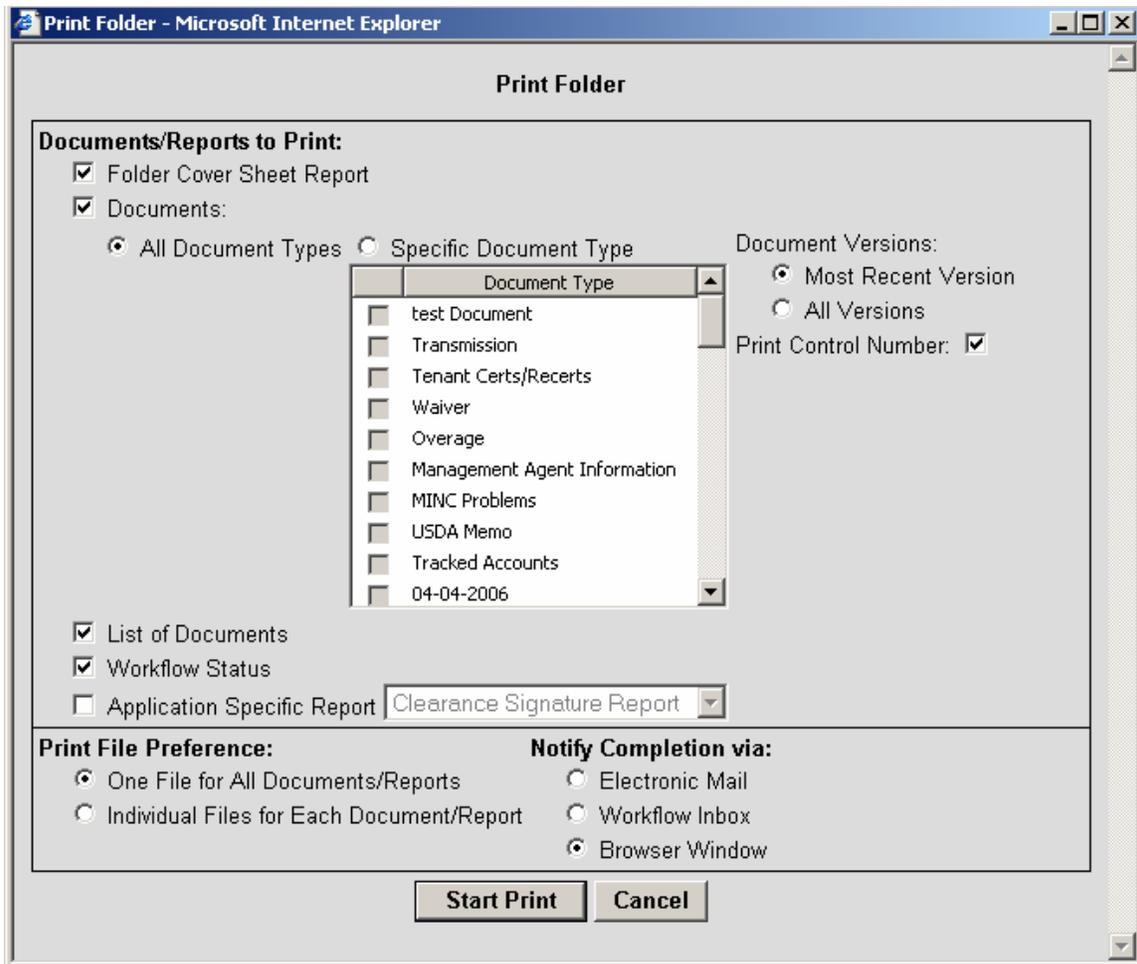


Figure 9: Print Folder Dialogue Print Selection Pop-up

The user can choose to be notified that the report has been created via E-mail, the Workflow Inbox or through a pop-up browser window. The selection can be made on the report window as shown in **Figure 9** or in the user's Personal Profile.

WORKFLOW STATUS

By highlighting a task and clicking <Workflow Status> a pop-up window such as the one in **Figure 10** is generated. The status provides timely information on the entire workflow as well as the current task.

Workflow Status - Microsoft Internet Explorer

Workflow Status

Today's Date: 08/28/2006 Control Number: 4410

	<u>Entire Workflow</u>	<u>Current Task</u>
Current Status:	Active	Started
Owner/Assignee:	Main Group	Main Group
Received Date:	08/03/2006	08/03/2006
Due Date:		08/04/2006
Days Since Receipt:	17	17
Days Until Due Date:	0	-16
Projected Completion	08/28/2006	08/28/2006
Projected Days Over/Under:	0	16
Date Final Response Signed:		
Actual Days Over/Under:		

Folder

Date Created: 08/03/2006 **By:** Ed Koenen

Date Closed: **By:**

Date Archived: **By:**

Date Deleted: **By:**

Document Clearance - Assignee Approvals

#	Task	Organization	Actual User	Proxy For	Date Cleared	Approval Type

Figure 10: Workflow Inbox – Workflow Status

ASSIGNEE DETAILS

By highlighting a task and clicking <Assignee Details> a pop-up window such as the one in **Figure 11** is generated. This window provides the assignee information available on the current folder task

Assignee Details

Task: Set Up Folder

Assignee	
Type:	Standard
Mission/Staff:	Rural Development
Agency:	None
Division:	None
Parent Groups:	None
Group:	Main Group
Position:	None
User:	None

Actual User: ecm userone

Proxy for:

Figure 11: Workflow Inbox – Assignee Details

SELECTING A TASK

When a task is assigned to a group, all members of the group receive the task in their inbox. When one of the group members selects the task, the task is assigned to them to complete. The actual user field is formatted with the user's name who selected the task. The task is removed from the other members' inboxes and the status of the task is changed from 'Assigned' to 'Started'.

To select a task, the user highlights the task and clicks <Select Task> as shown in **Figure 12**, or the user may doubleclick the task.

Workflow Inbox

Module: All Modules
Assignee: Personal and Group Tasks
Task Description: All Tasks

Tasks: Any
Status: Any
Special: Any

Sort By: Due Date Ascending
Display Count: 6

ID	Proc ...	!	Application	Task	Received	Due Date	O/U	Organization
1	4402	RDTest	Correspondence Mana...	Set Up Folder	08/03/2006	08/04/2006	+16	OSEC/RD/None/None
2	4403	RDTest	Correspondence Mana...	Set Up Folder	08/03/2006	08/04/2006	+16	OSEC/RD/None/None
3	4404	RDTest	Correspondence Mana...	Set Up Folder	08/03/2006	08/04/2006	+16	OSEC/RD/None/None
4	4405	RDTest	Correspondence Mana...	Set Up Folder	08/03/2006	08/04/2006	+16	OSEC/RD/None/None
5	4410		Correspondence Mana...	Set Up Folder	08/03/2006	08/04/2006	+16	OSEC/RD/None/None
6	4411		Correspondence Mana...	Set Up Folder	08/03/2006	08/04/2006	+16	OSEC/RD/None/None

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Folder Owner: Main Group
Folder Owner Phone: 301-751-2509
Folder Owner E-Mail: Michael.Muth@usda.gov
Subject:

Mission/Staff: RD
Agency: None
Division: None
Group: Main Group

Quick Print

Figure 12: Workflow Inbox – Select Task

When a new incoming correspondence document is received and the user selects the ‘Set Up Folder’ task, the Folder is opened with the incoming document displayed, documents tab opened and folder fields visible.

The actual user field is formatted with the user’s name who selected the task. The task is removed from the other members’ inboxes and the status of the task is changed from ‘Assigned’ to ‘Started’.