

MONITOR WORKFLOWS

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OPEN FOLDER

PRINT TASKS

WORKFLOW STATUS

ASSIGNEE DETAILS

CANCEL

MONITOR WORKFLOWS

The 'Monitor Workflows' selection allows users to monitor the current status of workflows with which the user has involvement. To access the <Monitor Workflows> screen, the user clicks on <Monitor Workflows> from the main menu as seen in **Figure 1**.

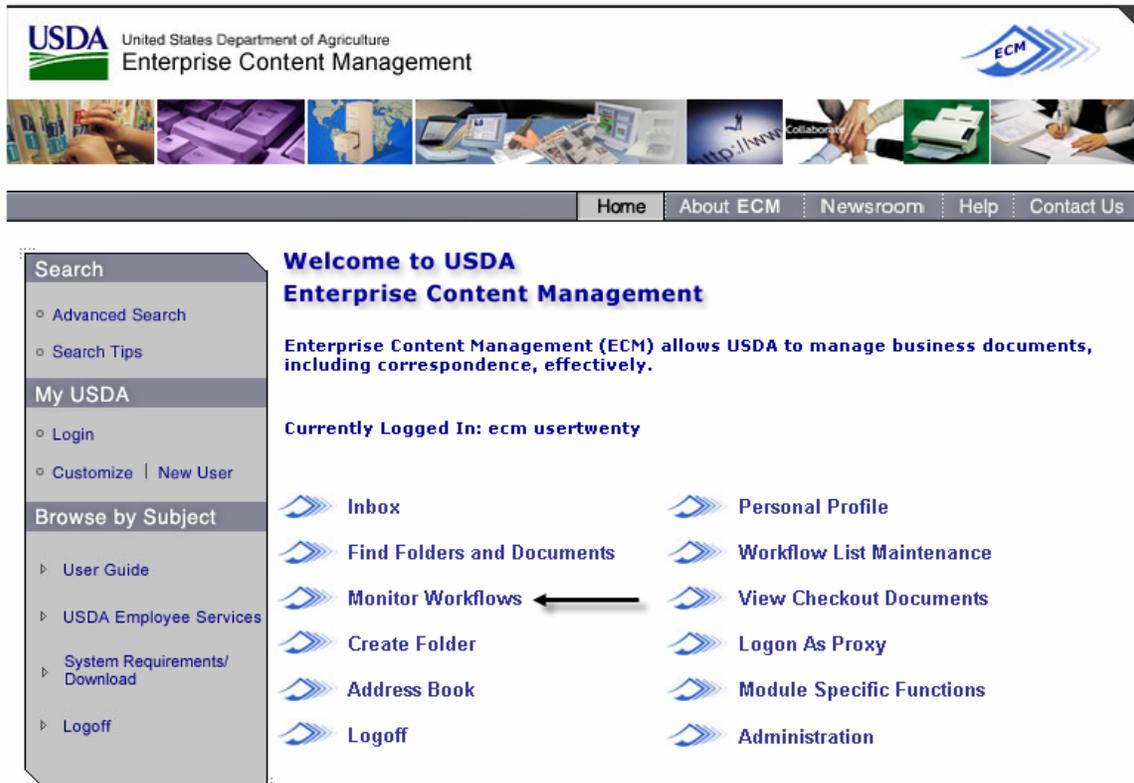


Figure 1: Main Menu – Monitor Workflows

The Monitor Workflows screen is displayed as shown in **Figure 2**. This screen has many different filtering options similar to the Inbox by making choices from the drop-down boxes, by selecting users or groups, by various tasks, and by due date.

With this screen, the user can also view tasks that others are working in addition to their own tasks. Unlike the Inbox, this screen allows the user to view tasks that are ‘Completed’ or Not Started’. The user enters filtering criteria in the top panel and then clicks the <Search> button. The results display can re-sorted by clicking a column heading (same as the Inbox). Users may only monitor workflows for folders that they have View access.

The ‘My Role’ field allows the user to select the role that they have with the folders and their workflows. To view the complete workflow or other folder information, the user clicks the <Open Folder> button and the folder for the workflow task is displayed.

Monitor Workflows

Module: Correspondence Management My Role: Folder Owner

Folder Owner: Select Action Organization: Select

Parent	Mission/Staff	Agency	Parent	Mission/Staff	Agency
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Tasks: All Tasks Contact: Contact Role: Any Role Task Status: Assigned/Started/Put Back

Task Description: All Tasks

Due Date From: To: Assignee: Select

Control Number: Actual User: Select

Special: Any Sort By: Due Date Ascending

Search Clear

ID	Proc Code	!	Task	Date Received	Due Date	O/U	Organization	Assignee	Organization
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Showing 0 - 0 of 0

Open Folder Print Tasks Workflow Status Assignee Details Cancel

Figure 2: Monitor Workflows

OPEN FOLDER

A folder can be opened by highlighting it and clicking the <Open Folder> button. When the folder is opened its contents look the same as when the folder is opened in a workflow process.

PRINT TASKS

A user can generate a report of the tasks in the 'Monitor Workflows' window by clicking <Print Tasks>. The report is generated as shown in **Figure 3**.

Monitor Workflows Tasks
09/11/2006

ID	Proj Code	Task	Date Received	Due Date	O/U	Organization	Assignee	Organization	Actual User	Status	FYI	Complete Date
4524		Add Final to Folder	09/06/2006	09/07/2006	+2	OSEC/RD/None/None	Main Group	OSEC/RD/None/None	ecm userone	Started	N	
4525		Add Final to Folder	09/06/2006	09/07/2006	+2	OSEC/RD/None/None	Main Group	OSEC/RD/None/None	ecm userone	Started	N	
4523		Add Final to Folder	09/06/2006	09/07/2006	+2	OSEC/FFAS/FSA/None	Main Group			Assigned	N	

Figure 3: Print Tasks – Monitor Workflows Tasks

WORKFLOW STATUS

The user can generate a Workflow Status for a folder by highlighting the folder as shown in **Figure 4** and clicking <Workflow Status>.

Monitor Workflows

Module: **My Role:**

Folder Owner: **Action Organization:**

Parent	Mission/Staff	Agency	Parent	Mission/Staff	Agency

Tasks: **Contact:**

Task Description: **Contact Role:**

Due Date From: **To:** **Task Status:**

Control Number: **Assignee:**

Special: **Actual User:**

Sort By: **Ascending**

ID	Pr...	!	Task	Date Received	Due Date	O/U	Organization	As
4524			Add Final to F...	09/06/2006	09/07/2006	+2	OSEC/RD/None/None	Main Gr
4525			Add Final to F...	09/06/2006	09/07/2006	+2	OSEC/RD/None/None	Main Gr
4523			Add Final to F...	09/06/2006	09/07/2006	+2	OSEC/FFAS/FSA/None	Main Gr

Showing 1 - 3 of 3

Figure 4: Monitor Workflows – Workflow Status

The status is displayed as shown in **Figure 5**.

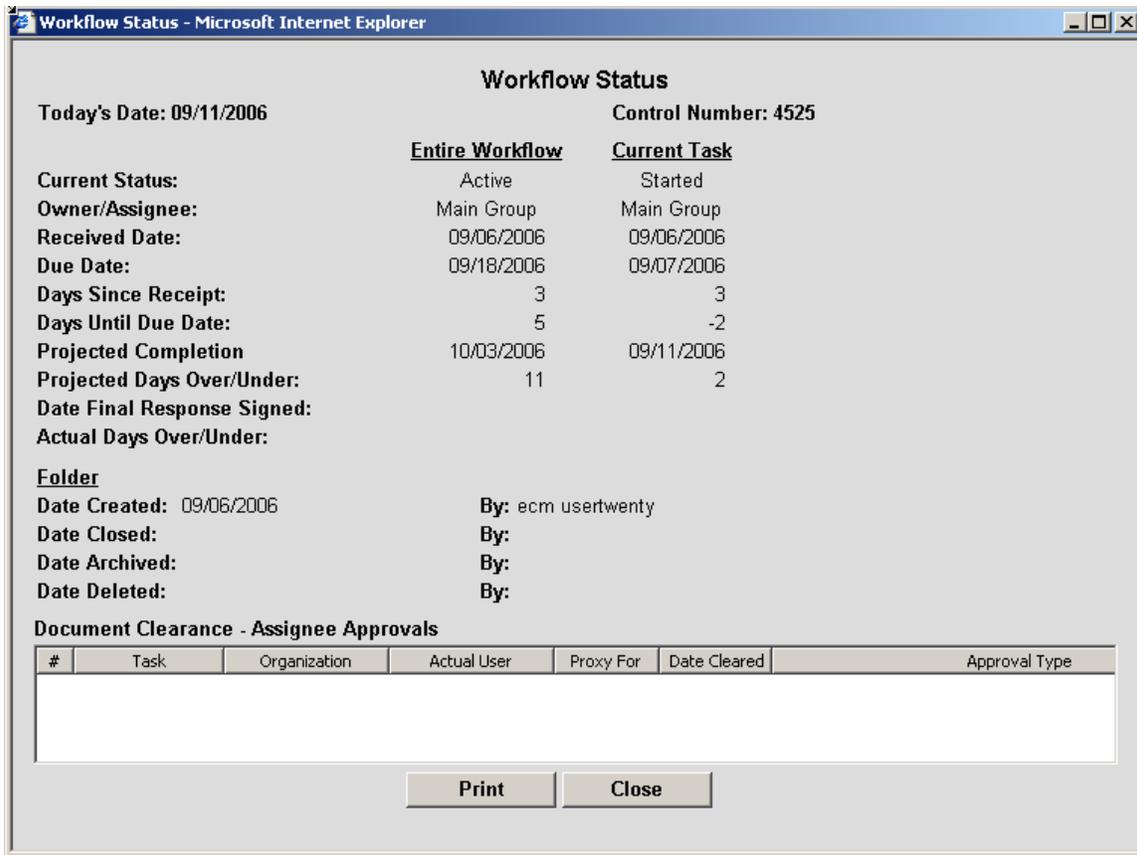


Figure 5: Workflow Status

ASSIGNEE DETAILS

By highlighting a task and clicking <Assignee Details> a pop-up window such as the one in **Figure 6** 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 6: Workflow Inbox – Assignee Details

CANCEL

The 'Cancel' option shown in **Figure 7** allows the user to cancel any actions or modifications and return to the previous screen.

Monitor Workflows

Module: Correspondence Management **My Role:** Folder Owner

Folder Owner: **Action Organization:**

Parent	Mission/Staff	Agency

Parent	Mission/Staff	Agency

Tasks: All Tasks **Contact:**

Task Description: All Tasks **Contact Role:** Any Role

Task Status: Assigned/Started/Put Back

Due Date From: **To:** **Assignee:**

Control Number: **Actual User:**

Special: Any **Sort By:** Due Date Ascending

ID	Proc Code	Task	Date Received	Due Date	O/U	Organization	Assignee	Organization

Showing 0 - 0 of 0

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Figure 7: Monitor Workflows - Cancel