

WORKFLOW TAB

WORKFLOW TAB

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WORKFLOW TAB

The Workflow Tab lists the work tasks to be completed for a folder. For incoming correspondence, the workflow list shows the tasks needed to successfully complete work on the folder. The tasks in the workflow will be completed in order as they appear from top to bottom on the list. Tasks can be set up to be completed at the same time. These parallel tasks will have the same task number. When the first assignee in the list completes a task, the folder is routed to the next assignee on the list.

Figure 1 shows the workflow tab for the folder. The Set Up Folder task was created by the system when the incoming correspondence document was scanned into the system. The system automatically launched the workflow and routed the task to the Folder Set Up Group inbox.

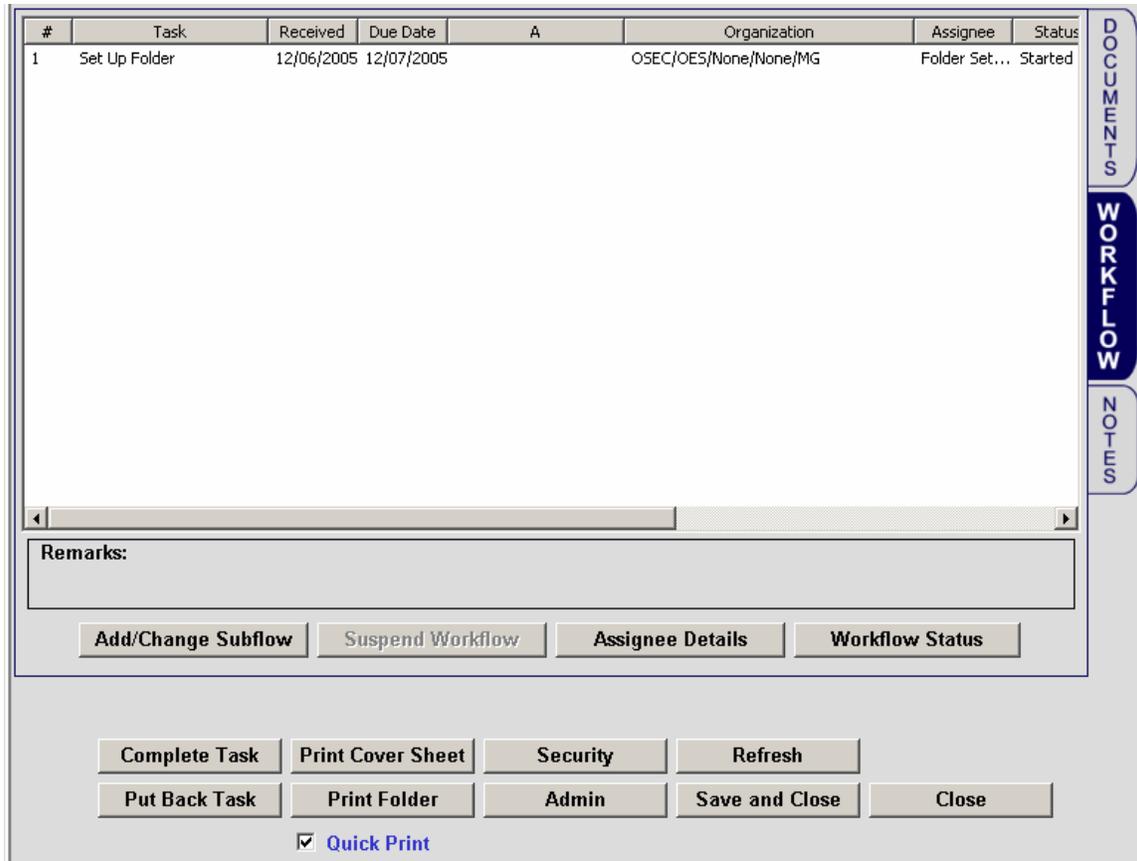


Figure 1: Folder Workflow Tab – New Folder

When the designated user in the Folder Set Up Group opens the folder, the correspondence will be opened automatically. The user reviews the correspondence and makes a determination as to the next step in the workflow.

PROCESSING CODE CONNECTED TO A DEFAULT WORKFLOW

The user may assign a processing code that is connected to a default workflow.

Figures 2 and **3** demonstrate the steps to assign a Processing Code that is connected to a default workflow.

- Click the Processing Code tab to bring up the Select Processing Code screen – **Figure 2**.
- Highlight the appropriate code and click <Select>.

Select Processing Code

Module:
Category:

Group:

Parent	Mission/Staff	Agency	Division
None	Office of the Execu...	None	None

Code	Description	Archival Subject Req
OE547	OES	No
OE550	Congressional	No
OE551	Congressional constituent service mail address...	No
OE552	Congressional constituent service mail address...	No
OE556	OES	No
OE577	OES	No
OE580	OES	No
OE599	This is a test code	No
RD456	Training	No

Grid Count: 30

Figure 2: Select Processing Code Screen

- The user is returned to the folder.
- Click the <Save> button. The default workflow is displayed as seen in **Figure 3**.

Control Number: 5001027 Status: Active Security Level: Public

Folder Owner: Processing Code: OES51

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: Main Group

Correspondent: 0 Date on Letter:

Addressee: 0 Received Date: 10/27/2005

Referrer: 0 Referrer Due Date:

Subject: Related Folders:

Save More

#	Task	Received	Due Date	A	Organization	Assignee	Status	Completed	Organizati
1	Set Up Folder	10/27/2005	10/31/2005		OSEC/OES/None...	Main Group	Started		OSEC/OES/N
2	Preparation		11/01/2005		OSEC/RD/RBS/N...	Correspondence Co...	Not Started		
3	Signature		11/08/2005		OSEC/RD/RBS/N...	Correspondence Co...	Not Started		
4	Signature Verification		11/09/2005		OSEC/OES/None...	Main Group	Not Started		

Workflow tasks 2, 3, and 4 are the default workflow connected to Processing Code OES51

DOCUMENTS
WORKFLOW
NOTES

Figure 3: Processing Code With Default Workflow

The Folder Owner can now view the default workflow associated with the processing code and move tasks up or down, add or delete tasks, make tasks parallel, and/or add subflows to tasks.

WORKFLOW TAB BUTTONS

The table in **Figure 4** describes the operations of the buttons on the Workflow Tab.

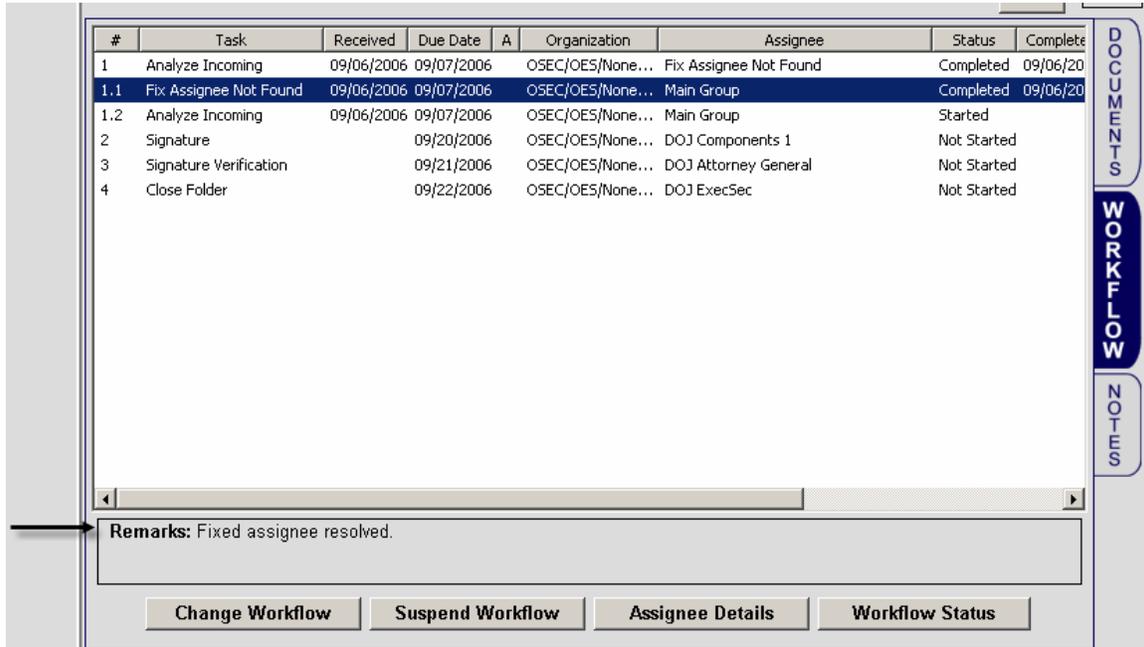
Button	Description
Change Workflow	Displays the Change Workflow Screen (buttons) that allow the Folder Owner to edit the workflow tasks that are displayed.
Add/Change Subflow	Opens the Workflow Editor with the current task displayed and allows subflow tasks to be added.
Launch Workflow Suspend Workflow	These buttons are only visible for the Folder Owner or an Application Administrator. When workflow tasks are first added to a folder's workflow tab, the <Launch Workflow> button is

Resume Workflow	enabled. The first workflow task is assigned when this button is clicked. The button changes to <Suspend Workflow>. When the user clicks the <Suspend Workflow> button it prevents the workflow from moving to the next step. This does not prevent tasks that are 'Assigned', 'Put Back' or 'Started' from being worked and completed. No new task will be 'Assigned' until the user clicks the <Resume Workflow> button. When the user clicks the <Resume Workflow> button, the workflow resumes. The button changes again to <Suspend Workflow>.
Assignee Details	Displays detailed information about the assignee for a specific task. The user highlights a workflow task and clicks the <Assignee Details> button to display the Assignee Details screen. The Assignee Details screen also allows a privileged group member to assign a task to an individual user within the group.
Workflow Status	Displays status information about the workflow including the status dates, and days in process for the current task and the entire workflow.
Complete Task	The user clicks the <Complete Task> button to finish their assigned task. The user is prompted to enter remarks and indicate approval (if required). When a task is completed, the status of the task is changed to 'Complete', the Actual User field is set to the user who completed the task, and the Date Completed is set to the current date. Only the Assignee, Proxy for the Assignee, Folder Owner or Administrator may complete a task.
Put Back Task	If a user selects a group task but then decides they can't complete it, the user can put it back so another group member can work on it. The Task Status changes to 'Put Back'. The Actual User field changes to the user who put it back. The task is put back in all group members' inboxes. The folder logs the user who clicked <Put Back> so it can be viewed using the View Put Back History screen via the Folder Maintenance menu.
Print Cover Sheet	Allows the user to print a Cover sheet which shows Folder Information including the workflow tasks and status, as well as any notes that have been added.
Print Folder	Allows the user to print information about the folder. Choices include the Cover Sheet, Security, and Documents. Preferences for the the 'Quick Print' Option are set in the user's personal preferences.
Security	Allows authorized users to Display and modify Folder Security.
Admin	Allows authorized users to view and move documents that have been removed from the folder and to view documents that have been moved to other folders.
Refresh	Allow the user to refresh the folder view.
Save and Close	Saves the folder information and closes the folder.
Close	Closes the folder without saving changes.

Figure 4: Workflow Tab Buttons

Remarks Window

The Remarks window, seen in **Figure 5**, is located below the Workflow window. When a task is highlighted, any remarks that were generated by the task or that were added when the task was completed are displayed.



The screenshot shows a software interface with a table of tasks and a remarks window below it. The table has columns for #, Task, Received, Due Date, A, Organization, Assignee, Status, and Complete. The task 'Fix Assignee Not Found' is highlighted. Below the table is a text area for remarks, which contains the text 'Remarks: Fixed assignee resolved.' To the right of the table are vertical tabs for 'DOCUMENTS', 'WORKFLOW', and 'NOTES'. At the bottom are buttons for 'Change Workflow', 'Suspend Workflow', 'Assignee Details', and 'Workflow Status'.

#	Task	Received	Due Date	A	Organization	Assignee	Status	Complete
1	Analyze Incoming	09/06/2006	09/07/2006		OSEC/OES/None...	Fix Assignee Not Found	Completed	09/06/20
1.1	Fix Assignee Not Found	09/06/2006	09/07/2006		OSEC/OES/None...	Main Group	Completed	09/06/20
1.2	Analyze Incoming	09/06/2006	09/07/2006		OSEC/OES/None...	Main Group	Started	
2	Signature		09/20/2006		OSEC/OES/None...	DOJ Components 1	Not Started	
3	Signature Verification		09/21/2006		OSEC/OES/None...	DOJ Attorney General	Not Started	
4	Close Folder		09/22/2006		OSEC/OES/None...	DOJ ExecSec	Not Started	

Remarks: Fixed assignee resolved.

Change Workflow Suspend Workflow Assignee Details Workflow Status

Figure 5: Remarks Window

WORKFLOW LIST EDITOR – CHANGE WORKFLOW

To make any changes to the workflow, the Folder Owner clicks the <Change Workflow> button. If a workflow has already been assigned to a folder and the user enters the <Change Workflow> key, the Pop-up window shown in **Figure 6** is displayed asking if the user wishes to 'Change Workflow' or 'Add/Change Subflow'. The user has two options: make changes to the existing workflow; or add or make changes to a subflow on the current task.

The user must finish editing the workflow and save it before selecting other tabs or performing other folder operations.

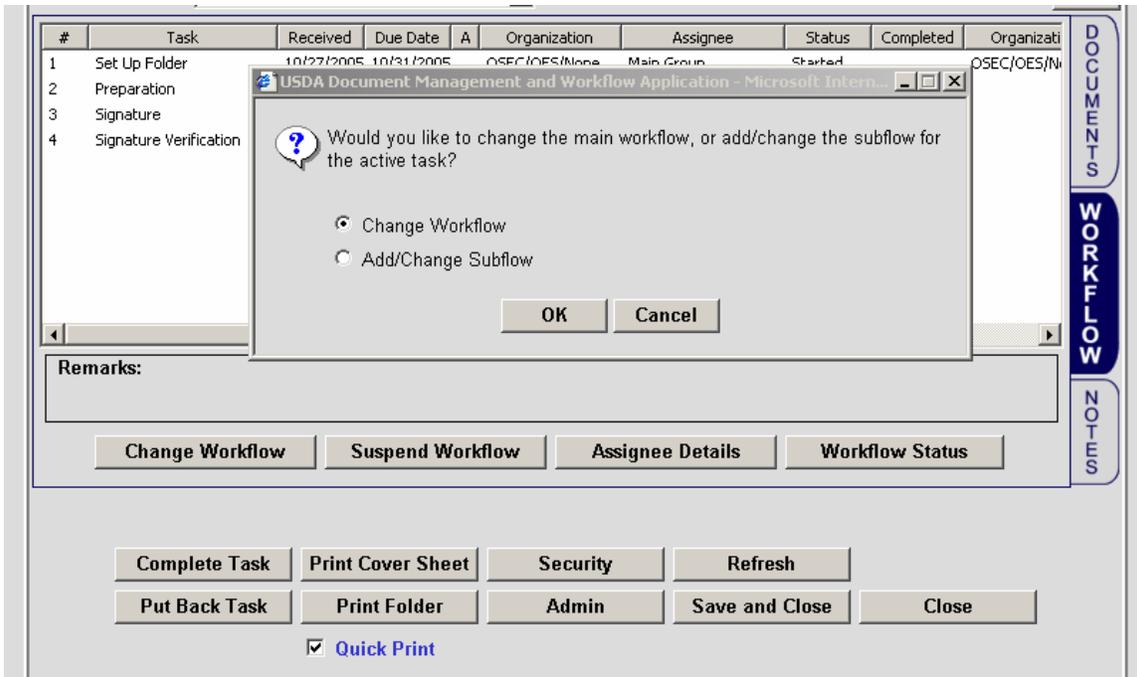


Figure 6: Workflow Application Pop-up

When the user chooses to change the workflow and clicks <OK>, she is taken to the Workflow Editor shown in **Figure 7**.

Due Date Type: <input checked="" type="radio"/> Floating <input type="radio"/> Fixed		Subflow Return to Assignee? <input type="radio"/> Allow Subflow Creator to Select <input type="radio"/> Return Required - Disable Selection			<input type="checkbox"/> Notify Owner When Workflow is Complete				
#	Task	Received	Due Date	A	Organization	Assignee	Status	Completed	Organiz
1	Set Up Folder	10/27/2005	10/31/2005		OSEC/OES/None...	Main Group	Started		OSEC/OES/
2	Preparation		11/01/2005		OSEC/RD/RB5/N...	Correspondence Cont...	Not Started		
3	Signature		11/08/2005		OSEC/RD/RB5/N...	Correspondence Cont...	Not Started		
4	Signature Verification		11/09/2005		OSEC/OES/None...	Main Group	Not Started		

Remarks:

Workflow List		Task			Update & Return
Insert from Library	Add	Move Up	Copy	Cancel	
Save to Library	Insert	Move Down	Edit Details		
	Remove	Remove All	Make Parallel		

Figure 7: Workflow Editor

Workflow Editor Menus

The functions within the Workflow Editor can be broken down into the various menus. At the top of the screen are three options as shown in **Figure 8**.

Due Date Type: 1 <input checked="" type="radio"/> Floating <input type="radio"/> Fixed	Subflow Return to Assignee? 2 <input type="radio"/> Allow Subflow Creator to Select <input type="radio"/> Return Required - Disable Selection	<input type="checkbox"/> Notify Owner When Workflow is Complete 3
---	--	---

Figure 8: Workflow Editor Options

1. Due DateType:

- **Floating:** A task is assigned a certain number of days to be completed. The countdown of days does not begin until the previous task has been completed and the next task has been received by the next user.
- **Fixed:** The task has a set due date no matter when the task has been received by the current user. A task may already be past due when it is received.

2. Subflow Return to Assignee:

- **Allow Subflow Creator to Select:** The creator of the subflow may choose whether or not the task is to be returned.
- **Return Required – Disable Selection:** The subflow must automatically be returned to the assignee. A separate task is generated to the subflow to accomplish this.

3. **Notify Owner When Workflow is Complete:** When checked the folder owner is notified when the workflow is completed.

WorkFlow List

The menu for the workflow list is shown in **Figure 9**.

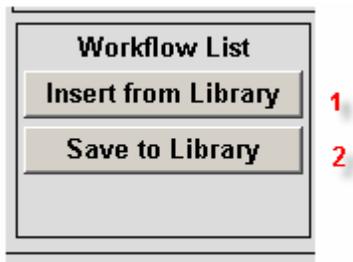


Figure 9: Workflow List Menu

1. Insert from Library - The user is taken to the Select Workflow List shown in **Figure 10**.

The user's default group is shown in the top window. The user may search the lists for another group by clicking the <Select Group> key. The list of workflows for that group is shown in the middle window. When a name on the list is highlighted, the workflow attached to that list is shown in the bottom window.

The user may scroll through the list or may search for a specific workflow by entering a name or a partial name in the 'Search For:' box and clicking <Search>.

Select Workflow List

Module: Category: List Type:

Group:

Parent Groups	Mission/Staff	Agency	Division
None	Office of the Executiv...	None	None

Workflow Lists for Selected Group:

DOJ Draft Subflow
DOJ Subflow 2
DOJ30 General Public
FNS Demo
Lisa1

Search for:

#	Task	# Days	A	Organization	Assignee	Appr	FYI	Notify
1	Draft Response	1		OSEC/OES/None...	DOJ Components 1	N	N	N
2	Clear Draft Resp...	1		OSEC/OES/None...	DOJ Components 2	Y	N	N

Grid Count: 2

Figure 10: Select Workflow List

The user clicks <Select List> and is returned to the Workflow Editor. If the workflow is complete and needs no changes, the user clicks <Update and Return>. The user returns to the folder with the workflow tab displayed. The new workflow will be shown in the window as seen in **Figure 11**. The <Launch Workflow> button is now visible.

#	Task	Received	Due Date	A	Organization	Assignee	Status	Complete
1	Preparation		09/07/2006		OSEC/OES/None...	Priority Group 3	Not Started	
2	Review Incoming		09/08/2006 *		OSECOSECOSEC...	Agency	Not Started	
3	Close Folder		09/11/2006 *		OSECOSECOSEC...	MFCAgency	Not Started	

Remarks:

Change Workflow Launch Workflow Assignee Details Workflow Status

Complete Task Print Cover Sheet Security Refresh

Put Back Task Print Folder Admin Save and Close Close

Quick Print

Figure 11: Workflow Tab – Launch Workflow

When the <Launch Workflow> button is clicked, the folder is redisplayed with the Workflow Tab open. The first task is assigned as shown in **Figure 12**.

#	Task	Received	Due Date	A	Organization	Assignee	Status	Complete
1	Preparation	09/06/2006	09/07/2006		OSEC/OES/None...	Priority Group 3	Assigned	
2	Review Incoming	09/08/2006 *			OSECOSECOSEC...	Agency	Not Started	
3	Close Folder	09/11/2006 *			OSECOSECOSEC...	MFCAgency	Not Started	

Remarks:

Change Workflow Suspend Workflow Assignee Details Workflow Status

Complete Task Print Cover Sheet Security Refresh

Put Back Task Print Folder Admin Save and Close Close

Quick Print

Figure 12: Workflow Tab – Workflow Launched

2. Save to Library: If a user has created a unique workflow that will be used again, it can be saved in the workflow library by clicking <Save to Library>.

The user can override an existing workflow by choosing <Select Existing List Name> as seen in **Figure 13**.

Save Workflow List

Enter New List Name Select Existing List Name

Include Setup Folder Task

OK Cancel

Figure 13: Save Workflow List – Select Existing List Name

The ‘Select Workflow List’ is displayed as seen in **Figure 14**. The user highlights the workflow to be overridden and clicks <Select List>. The new workflow is established under the existing name.

Select Workflow List

Module: Category: List Type:

Group:

Parent Groups	Mission/Staff	Agency	Division
None	Office of the Executiv...	None	None

Workflow Lists for Selected Group:

OES06 General Public No Evident Response Required
 OES07 Threats (or matters referred to OIG for handling)
 OES08 Comments on Proposed Regulations
 OES10S International Events (Outside US)
 OES11 Domestic Event (US or territories)

Search for:

#	Task	# Days	A	Organization	Assignee	Appr	FYI	Notify
1	Preparation	1		OSEC/OES/None...	Priority Group 2	N	N	N
2	Preparation	1	*	OSEC/OSEC/OSEC...	CMAgency	N	N	N
3	Information Copy	1		OSEC/OES/None...	OSEC	N	Y	N
4	Information Copy	1	*	OSEC/OSEC/OSEC...	Subcab	N	Y	N

Grid Count: 11

Figure 14: Save Workflow List – Select Existing List Name

The user creates a new workflow by choosing <Enter New List Name> as seen in **Figure 15**, entering the List Name, and clicking <OK>. If the user wants to have a Setup Folder Task added to the beginning of the new workflow, this will be done automatically by clicking the radio button next to 'Include Setup Folder Task'.

Save Workflow List

Enter New List Name Select Existing List Name

List Name: List Type:

Group:

Parent Groups	Mission/Staff	Agency	Division
None	Office of the Executive ...	None	None

Include Setup Folder Task

Figure 15: Save Workflow List – Enter New List Name

The new workflow can be viewed on the Select Workflow List as shown in **Figure 16**.

Select Workflow List

Module: Category: List Type:

Group:

Parent Groups	Mission/Staff	Agency	Division
None	Office of the Executiv...	None	None

Workflow Lists for Selected Group:

Search for:

#	Task	# Days	A	Organization	Assignee	Appr	FYI	Notify
1	Preparation	1		OSEC/OES/None...	Priority Group 3	N	N	N
2	Review Incoming	1	*	OSEC/OSEC/OSEC...	Agency	N	N	N
3	Create Draft	5		OSEC/OES/None...	Main Group	N	N	N
4	Close Folder	1	*	OSEC/OSEC/OSEC...	MFCAgency	N	N	N

Grid Count: 4

Figure 16: Select Workflow List – Enter New List Name

Task Menu

The Task Menu is shown in **Figure 17**.

Task		
<input type="button" value="Add 1"/>	<input type="button" value="Move Up 4"/>	<input type="button" value="Copy 7"/>
<input type="button" value="Insert 2"/>	<input type="button" value="Move Down 5"/>	<input type="button" value="Edit Details 8"/>
<input type="button" value="Remove 3"/>	<input type="button" value="Remove All 6"/>	<input type="button" value="Make Parallel 9"/>

Figure17: Task Menu

1. Add: The <Add> button allows the user to add a task to an existing workflow or to create a workflow. Upon clicking the <Add> button the ‘Add/Change Task’ screen is displayed as seen in **Figure 18**.

Add/Change Task

Task:

Assignee: **Type:**

User/Position:

Group:

Parent Groups	Mission/Staff	Agency	Division

Floating Days to Complete:

Due Date:

Approval

Not Required

Required

Notification

Notify When Task is Complete

Informational

Yes

No

Figure 18: Add/Change Task

The user may choose an existing task from the drop-down task box as shown in **Figure 19** or type in a task in the text box directly below the drop-down.

Add/Change Task

Task:

Award Grant

Approve Application

Assumptions/Transfers

04-04-2006

20

Add Final to Folder

Close Folder

Floating Days to Complete:

Due Date:

Approval

Not Required

Required

Notification

Notify When Task is Complete

Informational

Yes

No

Figure 19: Add/Change Task – Drop-down

Click on <Select Assignee>, and choose the assignee from the List View (Figure 20) or the Tree View (Figure 21).

Select Assignee List View Tree View

Mission/Staff: Rural Development
Agency: None
Division: None Show Groups/Positions Less

Parent Groups
None

Groups Positions
Main Group

Level Down Level Up

Find Group: Go

Select Group/Position Aliased

Users Display

Show Groups for User

Find User: Go

Select User

Cancel

Figure 20: Select Assignee – List View

Select Assignee Tree View List View

- [-] MS Office of the Secretary
 - [+] MS Office of the Chief Information Officer
 - [+] MS Office of the Chief Financial Officer
 - [+] MS National Appeals Division
 - [-] MS Rural Development
 - [+] A Correspondence Branch
 - [+] A kathys Agency
 - [-] A None
 - [-] D None
 - [-] G Main Group
 - P CMAgency
 - [+] P Confidential Assistant to the Under Secretary
 - [+] G Correspondence Branch RHS RBS
 - [+] G Correspondence Control Officer
 - [+] G Legislative and Public Affairs Staff
 - G MFCAgency
 - [+] G Operations and Management
 - [+] G Policy and Planning
 - [+] P Secretary
 - [+] P Under Secretary
 - Administrator, ECMM
 - Anderson, Kathy

Select Aliased Cancel

Figure 21: Select Assignee – Tree View

The example in **Figure 22** asks for ‘Floating Days to Complete’. If the user had indicated that a Fixed Due Date Type was required in the Workflow Editor screen, a date would be required here.

The user indicates whether or not Approval is required to complete the task, whether or not the folder owner wants to be notified when the task has been completed, and whether or not the task is Informational. A task that is ‘Informational’ does not need to be completed.

Add/Change Task

Task:

Assignee: Group Type: Standard

User/Position: Main Group

Parent Groups	Mission/Staff	Agency	Division
None	Rural Development	None	None

Floating Days to Complete:

Due Date:

Approval

Not Required
 Required

Notification

Notify When Task is Complete

Informational

Yes
 No

Figure 22: Add/Change Task

When the user has finished creating the task, she clicks <Save & Return> and is returned to the Workflow Editor as shown in **Figure 23** where additional functions may be performed to complete the workflow.

Due Date Type: <input checked="" type="radio"/> Floating <input type="radio"/> Fixed		Subflow Return to Assignee? <input type="radio"/> Allow Subflow Creator to Select <input type="radio"/> Return Required - Disable Selection			<input type="checkbox"/> Notify Owner When Workflow is Complete					
#	Task	Received	Due Date	A	Organization	Assignee	Status	Completed	Organiz	
1	Research		09/21/2006		OSEC/RD/None/...	Main Group	Not Started			
Remarks:										
Workflow List <input type="button" value="Insert from Library"/> <input type="button" value="Save to Library"/>		Task <input type="button" value="Add"/> <input type="button" value="Insert"/> <input type="button" value="Remove"/>			<input type="button" value="Move Up"/> <input type="button" value="Move Down"/> <input type="button" value="Remove All"/>			<input type="button" value="Copy"/> <input type="button" value="Edit Details"/> <input type="button" value="Make Parallel"/>		<input type="button" value="Update & Return"/> <input type="button" value="Cancel"/>

Figure 23: Workflow Editor – Task Added

2. Insert – This button allows the user to easily insert a task to the workflow. The user highlights the task that resides where the inserted task will be placed(**Figure 24**) and clicks <Insert>.

Due Date Type: <input checked="" type="radio"/> Floating <input type="radio"/> Fixed		Subflow Return to Assignee? <input type="radio"/> Allow Subflow Creator to Select <input type="radio"/> Return Required - Disable Selection			<input type="checkbox"/> Notify Owner When Workflow is Complete				
#	Task	Received	Due Date	A	Organization	Assignee	Status	Completed	Organiz
1	Research		09/21/2006		OSEC/RD/None/...	Main Group	Not Started		
2	Assumptions/Transfers		10/05/2006		OSEC/RD/None/...	Main Group	Not Started		
3	Approve Application		10/06/2006		OSEC/RD/None/...	Main Group	Not Started		
4	Award Grant		10/23/2006		OSEC/RD/None/...	Main Group	Not Started		
5	Notify Borrower		10/25/2006		OSEC/RD/None/...	Main Group	Not Started		

Remarks:

Workflow List <input type="button" value="Insert from Library"/> <input type="button" value="Save to Library"/>	Task			<input type="button" value="Update & Return"/> <input type="button" value="Cancel"/>
	<input type="button" value="Add"/>	<input type="button" value="Move Up"/>	<input type="button" value="Copy"/>	
	<input type="button" value="Insert"/>	<input type="button" value="Move Down"/>	<input type="button" value="Edit Details"/>	
	<input type="button" value="Remove"/>	<input type="button" value="Remove All"/>	<input type="button" value="Make Parallel"/>	

Figure 24: Insert Task

The 'Add/Change Task' screen will be displayed. The task to be inserted is created in the same manner as has been shown in the 'Add Task' function. The completed screen is shown in **Figure 25**.

Add/Change Task

Task: Add Final to Folder ▼

Assignee: Group **Type:** Standard

User/Position:

Group: Main Group **Select Assignee**

Parent Groups	Mission/Staff	Agency	Division
None	Rural Development	None	None

Floating Days to Complete:

Due Date:

Approval

Not Required

Required

Notification

Notify When Task is Complete

Informational

Yes

No

Figure 25: Add/Change Task – Create Task to be Inserted

After <Save & Return> is clicked the user is returned to the Workflow Editor showing the inserted task (**Figure 26**).

Due Date Type: <input checked="" type="radio"/> Floating <input type="radio"/> Fixed		Subflow Return to Assignee? <input type="radio"/> Allow Subflow Creator to Select <input type="radio"/> Return Required - Disable Selection			<input type="checkbox"/> Notify Owner When Workflow is Complete				
#	Task	Received	Due Date	A	Organization	Assignee	Status	Completed	Organiza
1	Research		09/21/2006		OSEC/RD/None/...	Main Group	Not Started		
2	Assumptions/Transfers		10/05/2006		OSEC/RD/None/...	Main Group	Not Started		
3	Add Final to Folder		10/06/2006		OSEC/RD/None/...	Main Group	Not Started		
4	Approve Application		10/09/2006		OSEC/RD/None/...	Main Group	Not Started		
5	Award Grant		10/24/2006		OSEC/RD/None/...	Main Group	Not Started		
6	Notify Borrower		10/26/2006		OSEC/RD/None/...	Main Group	Not Started		

Remarks:

Workflow List <input type="button" value="Insert from Library"/> <input type="button" value="Save to Library"/>		Task <input type="button" value="Add"/> <input type="button" value="Move Up"/> <input type="button" value="Copy"/> <input type="button" value="Insert"/> <input type="button" value="Move Down"/> <input type="button" value="Edit Details"/> <input type="button" value="Remove"/> <input type="button" value="Remove All"/> <input type="button" value="Make Parallel"/>			<input type="button" value="Update & Return"/> <input type="button" value="Cancel"/>	
--	--	--	--	--	---	--

Figure 26: Workflow Editor with Inserted Task Highlighted

3. Remove: Tasks where the status is 'Not Started' or 'Put Back' can be removed from the workflow. The user highlights the task to be removed as shown in **Figure 27** and clicks <Remove>.

Due Date Type: <input checked="" type="radio"/> Floating <input type="radio"/> Fixed		Subflow Return to Assignee? <input type="radio"/> Allow Subflow Creator to Select <input type="radio"/> Return Required - Disable Selection			<input type="checkbox"/> Notify Owner When Workflow is Complete				
#	Task	Received	Due Date	A	Organization	Assignee	Status	Completed	Organiz
1	Research		09/21/2006		OSEC/RD/None/...	Main Group	Not Started		
2	Assumptions/Transfers		10/05/2006		OSEC/RD/None/...	Main Group	Not Started		
3	Approve Application		10/06/2006		OSEC/RD/None/...	Main Group	Not Started		
4	Award Grant		10/23/2006		OSEC/RD/None/...	Main Group	Not Started		
5	Notify Borrower		10/25/2006		OSEC/RD/None/...	Main Group	Not Started		
6	Add Final to Folder		10/26/2006		OSEC/RD/None/...	Main Group	Not Started		
Remarks:									
Workflow List <input type="button" value="Insert from Library"/> <input type="button" value="Save to Library"/>		Task <input type="button" value="Add"/> <input type="button" value="Move Up"/> <input type="button" value="Copy"/> <input type="button" value="Insert"/> <input type="button" value="Move Down"/> <input type="button" value="Edit Details"/> <input type="button" value="Remove"/> <input type="button" value="Remove All"/> <input type="button" value="Make Parallel"/>						<input type="button" value="Update & Return"/> <input type="button" value="Cancel"/>	

Figure 27: Remove Task

The application will ask the user to verify that the task should be removed as shown in **Figure 28**.

Due Date Type:

Floating

Fixed

Subflow Return to Assignee?

Allow Subflow Creator to Select

Return Required - Disable Selection

Notify Owner When Workflow is Complete

#	Task	Received	Due Date	A	Organization	Assignee	Status	Completed	Organiz:
1	Research		09/21/2006		OSEC/RD/None/...	Main Group	Not Started		
2	Assumptions/Transfers		10/05/2006		OSEC/RD/None/...	Main Group	Not Started		
3	Approve Application		10/06/2006		OSEC/RD/None/...	Main Group	Not Started		
4	Award Grant		10/23/2006		OSEC/RD/None/...	Main Group	Not Started		
5	Notify Borrower	1					Not Started		
6	Add Final to Folder	1					Not Started		

Remarks:

Workflow List

Insert from Library

Save to Library

Task		
Add	Move Up	Copy
Insert	Move Down	Edit Details
Remove	Remove All	Make Parallel

Update & Return

Cancel

Figure 28: Verify Removal of Task

The Workflow Editor screen is refreshed to show the revised workflow as seen in **Figure 29**.

Due Date Type: <input checked="" type="radio"/> Floating <input type="radio"/> Fixed		Subflow Return to Assignee? <input type="radio"/> Allow Subflow Creator to Select <input type="radio"/> Return Required - Disable Selection		<input type="checkbox"/> Notify Owner When Workflow is Complete	
---	--	--	--	---	--

#	Task	Received	Due Date	A	Organization	Assignee	Status	Completed	Organiza
1	Research		09/21/2006		OSEC/RD/None/...	Main Group	Not Started		
2	Assumptions/Transfers		10/05/2006		OSEC/RD/None/...	Main Group	Not Started		
3	Approve Application		10/06/2006		OSEC/RD/None/...	Main Group	Not Started		
4	Notify Borrower		10/10/2006		OSEC/RD/None/...	Main Group	Not Started		
5	Add Final to Folder		10/11/2006		OSEC/RD/None/...	Main Group	Not Started		

Remarks:

Workflow List Insert from Library Save to Library	Task			Update & Return Cancel
	Add	Move Up	Copy	
	Insert	Move Down	Edit Details	
	Remove	Remove All	Make Parallel	

Figure 29: Remove - Revised Workflow

The removal can still be canceled by clicking the <Cancel> key. The removal is confirmed by clicking <Update & Return>.

4. **Move Up:** Tasks can be moved up within the workflow by highlighting the task and clicking the <Move Up> key. All tasks are then renumbered.

5. **Move Down:** Tasks can be moved down within the workflow by highlighting the task and clicking the <Move Down> key. All tasks are then renumbered.

6. **Remove All:** This key allows the user to remove all unstarted tasks. Only tasks with a status of 'Not Started' can be removed with the <Remove All> key.

The screen in **Figure 30** shows the Workflow Editor with the Pop-up asking the user to verify that all 'Not Started' tasks are to be removed.

Due Date Type:
 Floating
 Fixed

Subflow Return to Assignee?
 Allow Subflow Creator to Select
 Return Required - Disable Selection

Notify Owner When Workflow is Complete

#	Task	Received	Due Date	A	Organization	Assignee	Status	Completed	Organiza
1	Research		09/21/2006		OSEC/RD/None/...	Main Group	Not Started		
2	Assumptions/Transfers		10/05/2006		OSEC/RD/None/...	Main Group	Not Started		
3	Approve Application		10/06/2006		OSEC/RD/None/...	Main Group	Not Started		
4	Notify Borrower		10/10/2006		OSEC/RD/None/...	Main Group	Not Started		
5	Add Final to Folder						Started		

Microsoft Internet Explorer
 Are you sure you want to remove all 'Not Started' tasks?

Remarks:

Workflow List <input type="button" value="Insert from Library"/> <input type="button" value="Save to Library"/>	Task			<input type="button" value="Update & Return"/> <input type="button" value="Cancel"/>
	<input type="button" value="Add"/>	<input type="button" value="Move Up"/>	<input type="button" value="Copy"/>	
	<input type="button" value="Remove"/>	<input type="button" value="Remove All"/>	<input type="button" value="Make Parallel"/>	

Figure 30: Remove All – Verification Pop-up

After clicking <Ok>, the Workflow Editor is refreshed to show that the tasks have been removed as shown in **Figure 31**.

Due Date Type: <input checked="" type="radio"/> Floating <input type="radio"/> Fixed		Subflow Return to Assignee? <input type="radio"/> Allow Subflow Creator to Select <input type="radio"/> Return Required - Disable Selection			<input type="checkbox"/> Notify Owner When Workflow is Complete				
#	Task	Received	Due Date	A	Organization	Assignee	Status	Completed	Organiza
Remarks:									
Workflow List <input type="button" value="Insert from Library"/> <input type="button" value="Save to Library"/>		Task <input type="button" value="Add"/> <input type="button" value="Move Up"/> <input type="button" value="Copy"/>			<input type="button" value="Update & Return"/>				
		<input type="button" value="Insert"/> <input type="button" value="Move Down"/> <input type="button" value="Edit Details"/>			<input type="button" value="Cancel"/>				
		<input type="button" value="Remove"/> <input type="button" value="Remove All"/> <input type="button" value="Make Parallel"/>							

Figure 31: Remove All

The removal can still be canceled by clicking the <Cancel> key. The removal is confirmed by clicking <Update & Return>.

7. Copy: The user can copy a task and then insert it back into the Workflow.

Highlight the task to be copied and click <Copy>, then Click <Insert>. The Pop-up in **Figure 32** will be displayed.

#	Task	Received	Due Date	A	Organization	Assignee	Status	Completed	Organiz
1	Set Up Folder	10/27/2005	10/31/2005		OSEC/OES/None...	Main Group	Started		OSEC/OES/
2	Preparation		11/01/2005		OSEC/RD/RBS/N...	Correspondence Cont...	Not Started		
3	Signature		11/08/2005		OSEC/RD/RBS/N...	Correspondence Cont...	Not Started		
4	Signature Verification		11/09/2005		OSEC/OES/None...	Main Group	Not Started		

Microsoft Internet Explorer

Do you want to insert the copied task? Select Cancel to insert a new task.

OK Cancel

Remarks:

Workflow List	Task			Update & Return
Insert from Library	Add	Move Up	Copy	Cancel
Save to Library	Insert	Move Down	Edit Details	
	Remove	Remove All	Make Parallel	

Figure 32: Copied Task - Insert

To insert the copied task click <Ok> and the copied task is added to the workflow. The task can then be repositioned within the workflow by Moving it up or down as seen in **Figure 33**.

Due Date Type: <input checked="" type="radio"/> Floating <input type="radio"/> Fixed		Subflow Return to Assignee? <input type="radio"/> Allow Subflow Creator to Select <input type="radio"/> Return Required - Disable Selection			<input type="checkbox"/> Notify Owner When Workflow is Complete				
#	Task	Received	Due Date	A	Organization	Assignee	Status	Completed	Organiz
1	Set Up Folder	10/27/2005	10/31/2005		OSEC/OES/None...	Main Group	Started		OSEC/OES/
2	Preparation		11/01/2005		OSEC/RD/RBS/N...	Correspondence Cont...	Not Started		
3	Signature		11/08/2005		OSEC/RD/RBS/N...	Correspondence Cont...	Not Started		
4	Preparation		11/09/2005		OSEC/RD/RBS/N...	Correspondence Cont...	Not Started		
5	Signature Verification		11/10/2005		OSEC/OES/None...	Main Group	Not Started		

Remarks:

Workflow List		Task			Update & Return
Insert from Library	Add	Move Up	Copy	Cancel	
Save to Library	Insert	Move Down	Edit Details		
	Remove	Remove All	Make Parallel		

Figure 33: Copied Task

8. Edit Details: The Edit Details Option is used to change one task to another or to modify certain details about a task. Tasks that have been completed may not be edited.

The user must select a task to edit and click <Edit Details>. The screen shown in **Figure 34** will be displayed.

Add/Change Task

Task: ▼

Preparation

Assignee: Group	Type: Standard
User/Position:	
Group: Main Group	Select Assignee

Parent Groups	Mission/Staff	Agency	Division
Office of the Exe...		None	None

Floating Days to Complete: 1	Approval <input checked="" type="radio"/> Not Required <input type="radio"/> Required
Due Date: 	Informational <input type="radio"/> Yes <input checked="" type="radio"/> No
Notification <input type="checkbox"/> Notify When Task is Complete	

Save & Return
Cancel

Figure 34: Edit Details – Add/Change Task

The user may:

- Choose a different task from the drop-down box in the taskbar - the name of the selected task appears below the task bar.
- Select a different assignee by clicking <Select Assignee>
- Change the number of floating days to complete or the Due Date
- Select approval requirements
- Select whether or not the Folder Owner is to be notified upon completion of the task.

The changes are saved when the <Save & Return> key is entered or all actions may be canceled by selecting the <Cancel> key. The user will be returned to the Workflow Editor.

9. Make Parallel

This option permits the user to create a workflow in which two or more tasks can be worked at the same time. The next task is not assigned until all tasks parallel to one another have been completed.

In order for tasks to be made parallel, all of the tasks selected must be “Not Started”. If any of the selected tasks are already started, the error message in **Figure 35** is displayed.

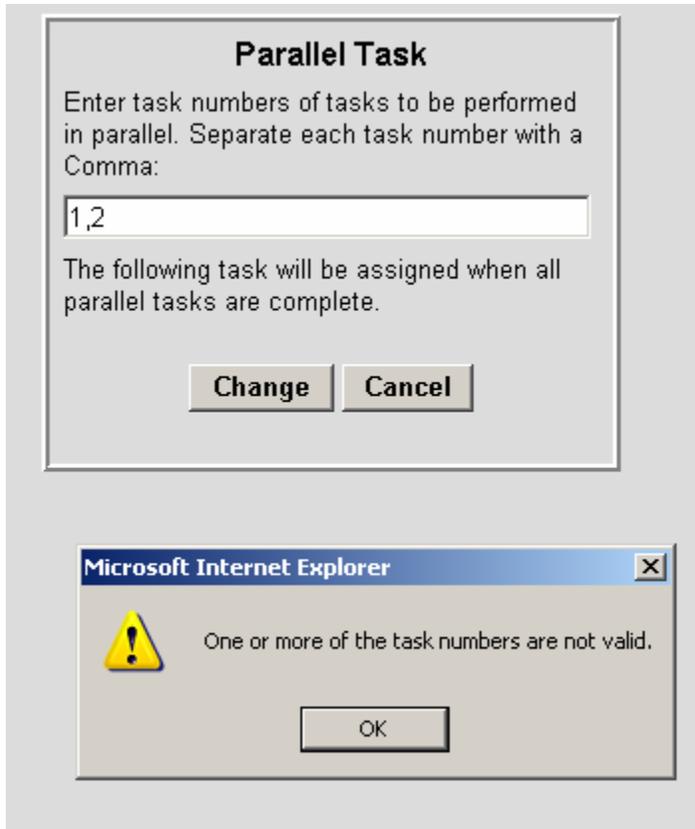


Figure 35: Parallel Task - Error message

When the <Make Parallel> key is pressed, the Parallel Task screen is displayed. The numbers of the task to be made parallel are then entered and the <Change> key is pressed.

All tasks to be made parallel can be highlighted at the same time by holding down the CTRL key and selecting the tasks as shown in **Figure 36**.

#	Task	Received	Due Date	A	Organization	Assignee	Status	Completed	Organiza
1	Set Up Folder	10/27/2005	10/31/2005		OSEC/OES/None...	Main Group	Started		OSEC/OES/
2	Preparation		11/01/2005		OSEC/RD/RBS/N...	Correspondence Cont...	Not Started		
3	Signature		11/08/2005		OSEC/RD/RBS/N...	Correspondence Cont...	Not Started		
4	Signature Verification		11/09/2005		OSEC/OES/None...	Main Group	Not Started		

Figure 36: Make Tasks Parallel by Holding Down the CTRL Key and Selecting Tasks

When the <Make Parallel> key is pressed the Parallel Task screen is prefilled with the selected tasks as seen in **Figure 37**.

Parallel Task

Enter task numbers of tasks to be performed in parallel. Separate each task number with a Comma:

2,3

The following task will be assigned when all parallel tasks are complete.

Change
Cancel

Figure 37: Parallel Task Screen

Figure 38 shows two tasks with a number '2'.

#	Task	Received	Due Date	A	Organization	Assignee	Status	Completed	Organiza
1	Set Up Folder	10/27/2005	10/31/2005		OSEC/OES/None...	Main Group	Started		OSEC/OES/
2	Preparation		11/01/2005		OSEC/RD/RBS/N...	Correspondence Cont...	Not Started		
2	Signature		11/07/2005		OSEC/RD/RBS/N...	Correspondence Cont...	Not Started		
3	Signature Verification		11/08/2005		OSEC/OES/None...	Main Group	Not Started		

Figure 38: Tasks 2 and 3 After Being Made Parallel

When tasks are made parallel, they are assigned the same number and all subsequent tasks are renumbered.

If the task directly above the parallel tasks is moved down, the task will move down below all the parallel tasks. The parallel tasks will be renumbered and they will remain parallel.

If the task directly below the parallel tasks is moved up, the task will move up above all the parallel tasks. The parallel tasks will be renumbered and they will remain parallel.

Update & Return and Cancel

After the modifications have been completed on the workflow the user saves the changes or cancels the changes. **Figure 39** shows the keys used for this.



Figure 39: Update & Return and Cancel

1. Update & Return: This button saves the changes to the workflow and returns the user to the main Workflow tab.
2. Cancel: This button is used to cancel changes to the workflow and returns the user to the main Workflow tab.

WORKFLOW LIST EDITOR – ADD/CHANGE SUBFLOW

To add a subflow to the current task, the assignee clicks the <Change Workflow> button and then clicks the <Add/Change Subflow> button. See **Figure 40**.

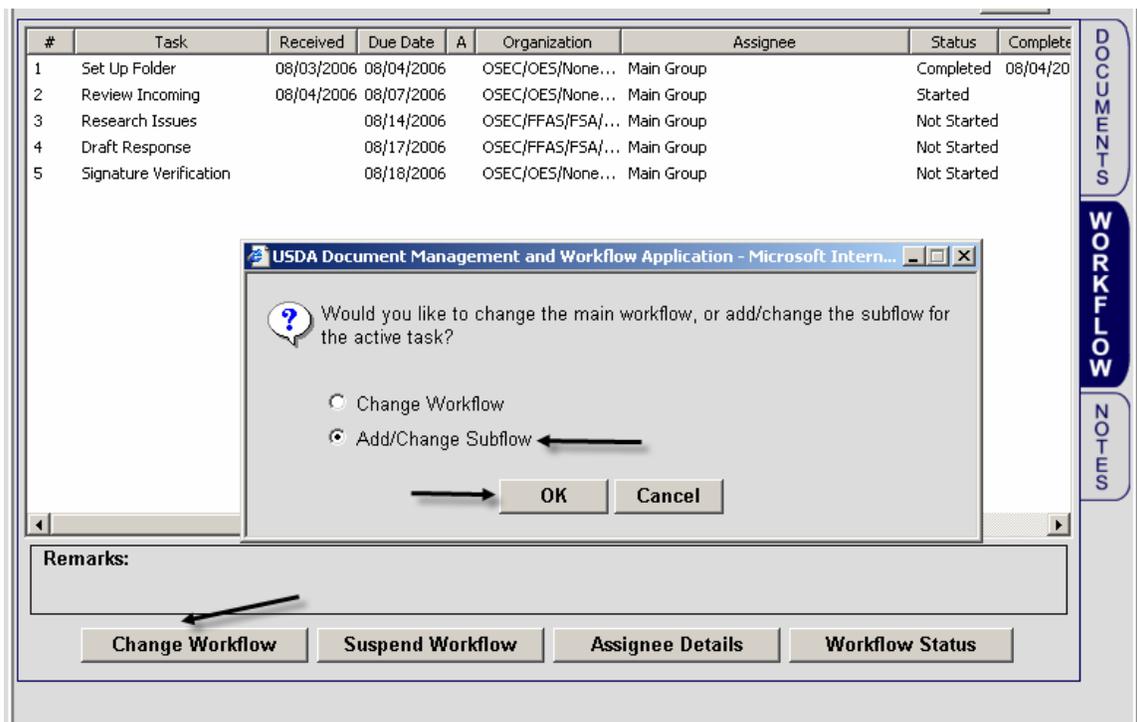


Figure 40: Add/Change Subflow

The workflow editor for a subflow is displayed as shown in **Figure 41**. The current task to which the subflow will be added is shown under the heading ‘Workflow Assignment’.

Workflow Assignment

#	Task	Received	Due Date	A	Organization	Assignee	Status	Completed	Organiz
2	Review Incoming	08/04/2006	08/07/2006		OSEC/OES/None...	Main Group	Started		OSEC/OES/

Subflow Assignments Subflow Return to Assignee Required? Yes No

#	Task	Received	Due Date	A	Organization	Assignee	Status	Completed	Organiz
---	------	----------	----------	---	--------------	----------	--------	-----------	---------

Remarks:

Workflow List

Insert from Library

Save to Library

Task

Add Move Up Copy

Insert Move Down Edit Details

Remove Remove All Make Parallel

Update & Return

Cancel

Figure 41: Subflow Editor

The buttons on the Subflow Editor work in the same manner as those for the Workflow Editor already detailed.

One deviation is that Subflow Tasks can not be edited. If a user attempts to <Edit Details> on a subflow task, the error message in **Figure 42** is displayed.

#	Task	Received	Due Date	A	Organization	Assignee	Status	Completed	Organiz
1	Analyze Incoming	09/06/2006	09/07/2006		OSEC/OES/None...	Fix Assignee Not Found	Completed	09/06/2006	
1.1	Fix Assignee Not Found	09/06/2006	09/07/2006		OSEC/OES/None...	Main Group	Completed	09/06/2006	OSEC/OES/
1.2	Analyze Incoming	09/06/2006	09/07/2006		OSEC/OES/None...	Main Group	Started		OSEC/OES/
2	Signature		09/20/2006		OSEC/OES/None...	DOJ Components 1	Not Started		
3	Signature Verification		09/21/2			General	Not Started		
4	Close Folder		09/22/2				Not Started		

Microsoft Internet Explorer

You can not edit subflow tasks.

OK

Figure 42: Edit Details - Subflow Tasks

When a workflow is inserted from the library or tasks are added individually, they are numbered with the original task number and then assigned a number within the subflow. In **Figure 43** workflow assignment '2' has one subflow assignment '2.1'

Workflow Assignment									
#	Task	Received	Due Date	A	Organization	Assignee	Status	Completed	Organiz
2	Review Incoming	08/04/2006	08/07/2006		OSEC/OES/None...	Main Group	Started		OSEC/OES/

Subflow Assignments										Subflow Return to Assignee Required? <input checked="" type="radio"/> Yes <input type="radio"/> No	
#	Task	Received	Due Date	A	Organization	Assignee	Status	Completed	Organiz		
2.1	Signature		08/08/2006		OSEC/FFAS/Non...	Main Group	Not Started				

Remarks:

Workflow List	Task			
Insert from Library	Add	Move Up	Copy	Update & Return
Save to Library	Insert	Move Down	Edit Details	Cancel
	Remove	Remove All	Make Parallel	

Figure 43: Subflow Task 2.1 to be Added to the Workflow

Figure 44 shows the revised workflow with subflow tasks 2.1 (Signature) and 2.2 (Subflow Return). Subflow task 2.2 is generated because the question 'Subflow Return to Assignee Required' is marked 'Yes' on the Subflow Editor.

#	Task	Received	Due Date	A	Organization	Assignee	Status	Complete
1	Set Up Folder	08/03/2006	08/04/2006		OSEC/OES/None...	Main Group	Completed	08/04/20
2	Review Incoming	08/04/2006	08/07/2006		OSEC/OES/None...	Main Group	Started	
2.1	Signature	08/08/2006			OSEC/FFAS/Non...	Main Group	Not Started	
2.2	Subflow Return		08/07/2006		OSEC/OES/None...	ecm usertwenty	Not Started	
3	Research Issues		08/14/2006		OSEC/FFAS/FSA/...	Main Group	Not Started	
4	Draft Response		08/17/2006		OSEC/FFAS/FSA/...	Main Group	Not Started	
5	Signature Verification		08/18/2006		OSEC/OES/None...	Main Group	Not Started	

Remarks:

Change Workflow Suspend Workflow Assignee Details Workflow Status

Figure 44: Subflow Tasks 2.1 and 2.2 Added to Workflow Task 2

LAUNCH /SUSPEND/ RESUME WORKFLOW

The <Launch Workflow> button is visible when a folder has just been created (Figure 45) or if a workflow has just been added and all the tasks are marked 'Not Started'. (Figure 46)

#	Task	Received	Due Date	A	Organization	Assignee	Status	Completed

Remarks:

Change Workflow **Launch Workflow** Assignee Details Workflow Status

Figure 45: Launch Workflow – New Folder

#	Task	Received	Due Date	A	Organization	Assignee	Status	Completed
1	Draft Response		09/12/2006		OSEC/MRP/APHIS/None/MG	Correspon...	Not Started	
2	Review Draft		09/13/2006		OSEC/MRP/APHIS/None/MG	APHIS De...	Not Started	
3	Final Response		09/14/2006		OSEC/MRP/APHIS/None/MG/CCO/AP...	Correspon...	Not Started	
4	Signature		09/18/2006		OSEC/MRP/APHIS/None/MG	APHIS Admin	Not Started	
5	Mail response and Close...		09/19/2006		OSEC/MRP/APHIS/None/MG	Correspon...	Not Started	

Remarks:

Change Workflow Launch Workflow Assignee Details Workflow Status

Figure 46: Launch Workflow – New Workflow

Launching the workflow assigns the first task as seen in **Figure 47**.

#	Task	Received	Due Date	A	Organization	Assignee	Status	Completed
1	Draft Response	09/07/2006	09/12/2006		OSEC/MRP/APHIS/None/MG	Correspon...	Assigned	
2	Review Draft		09/13/2006		OSEC/MRP/APHIS/None/MG	APHIS De...	Not Started	
3	Final Response		09/14/2006		OSEC/MRP/APHIS/None/MG/CCO/AP...	Correspon...	Not Started	
4	Signature		09/18/2006		OSEC/MRP/APHIS/None/MG	APHIS Admin	Not Started	
5	Mail response and Close...		09/19/2006		OSEC/MRP/APHIS/None/MG	Correspon...	Not Started	

Remarks:

Change Workflow Suspend Workflow Assignee Details Workflow Status

Figure 47: Workflow Has Been Launched

Suspend /Resume Workflow

After the workflow has been launched, the <Launch Workflow> key changes to <Suspend Workflow > if the folder status is 'Active' and <Resume Workflow> if the folder status is 'Suspended'.

To suspend the workflow, the user clicks <Suspend Workflow>as shown in **Figure 48**. The Folder status changes to 'Suspended' and the workflow window becomes gray.

The workflow can also become suspended if the user leaves the workflow editor without completing the changes or if the user allows the ECM application to time-out due to inactivity while in the workflow editor.

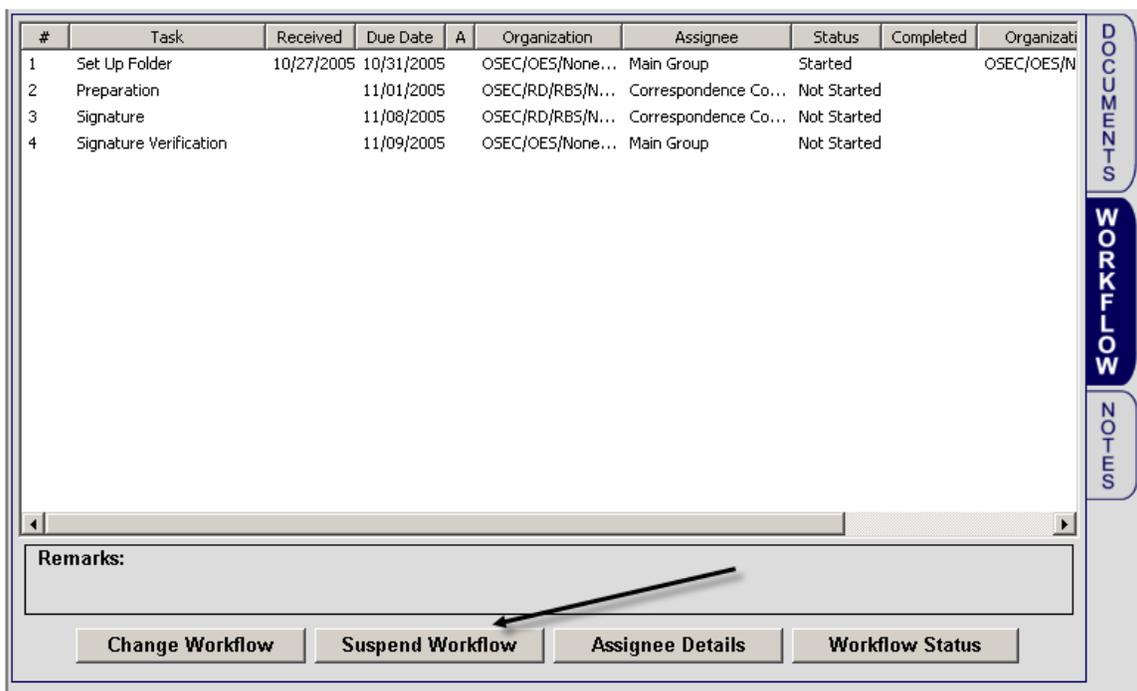


Figure 48: Suspend Workflow

To return the folder status to 'Active', the user clicks the <Resume Workflow> button as shown in **Figure 49**.

#	Task	Received	Due Date	A	Organization	Assignee	Status
1	Prepare Final	08/04/2006	08/08/2006		OSEC/RD/RBS/None/MG	Correspon...	Assigne
2	Review Final	08/09/2006			OSEC/RD/RBS/None/MG	Correspon...	Not Star
3	Sample for class		08/10/2006		OSEC/RD/RBS/None/MG	Correspon...	Not Star
4	Parallel Task Sample		08/11/2006		OSEC/RD/RBS/None/MG	Correspon...	Not Star
5	Add Final to Folder		08/16/2006		OSEC/RD/None/None	Main Group	Not Star

Remarks:

Change Workflow Resume Workflow Assignee Details Workflow Status

Figure 49: Resume Suspended Workflow

ASSIGNEE DETAILS

The user can view assignee details of a selected task by clicking <Assignee Details>. (Figure 50)

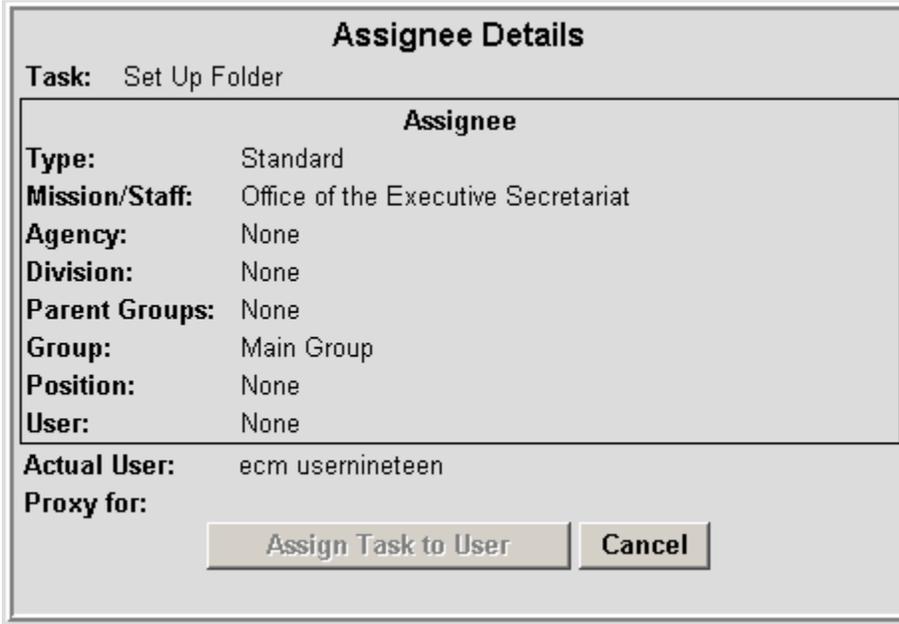
#	Task	Received	Due Date	A	Organization	Assignee	Status	Completed	Organizati
1	Set Up Folder	10/27/2005	10/31/2005		OSEC/OES/None...	Main Group	Started		OSEC/OES/N
2	Preparation		11/01/2005		OSEC/RD/RBS/N...	Correspondence Co...	Not Started		
3	Signature		11/08/2005		OSEC/RD/RBS/N...	Correspondence Co...	Not Started		
4	Signature Verification		11/09/2005		OSEC/OES/None...	Main Group	Not Started		

Remarks:

Change Workflow Suspend Workflow Assignee Details Workflow Status

Figure 50: Select a Task

The Assignee Details screen is displayed as shown in **Figure 51**.



Assignee Details

Task: Set Up Folder

Assignee

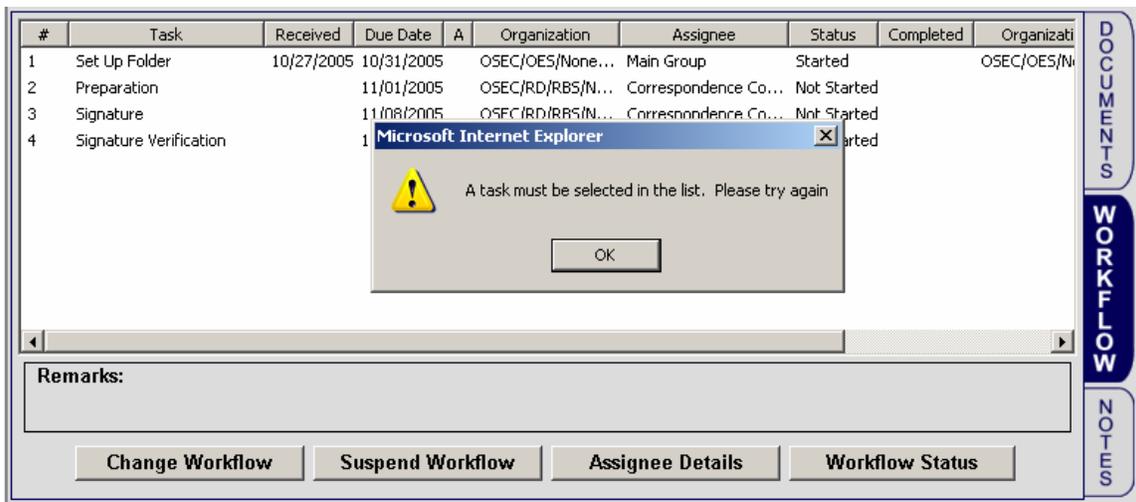
Type: Standard
Mission/Staff: Office of the Executive Secretariat
Agency: None
Division: None
Parent Groups: None
Group: Main Group
Position: None
User: None

Actual User: ecm usermineteen
Proxy for:

Assign Task to User Cancel

Figure 51: Assignee Details

If a task is not highlighted, the error message in **Figure 52** is displayed.



Workflow screen showing a table of tasks and an error message dialog box.

#	Task	Received	Due Date	A	Organization	Assignee	Status	Completed	Organizati
1	Set Up Folder	10/27/2005	10/31/2005		OSEC/OES/None...	Main Group	Started		OSEC/OES/Ni
2	Preparation		11/01/2005		OSEC/RD/RBS/N...	Correspondence Co...	Not Started		
3	Signature		11/08/2005		OSEC/RD/RBS/N...	Correspondence Co...	Not Started		
4	Signature Verification						Not Started		

Microsoft Internet Explorer

 A task must be selected in the list. Please try again

OK

Remarks:

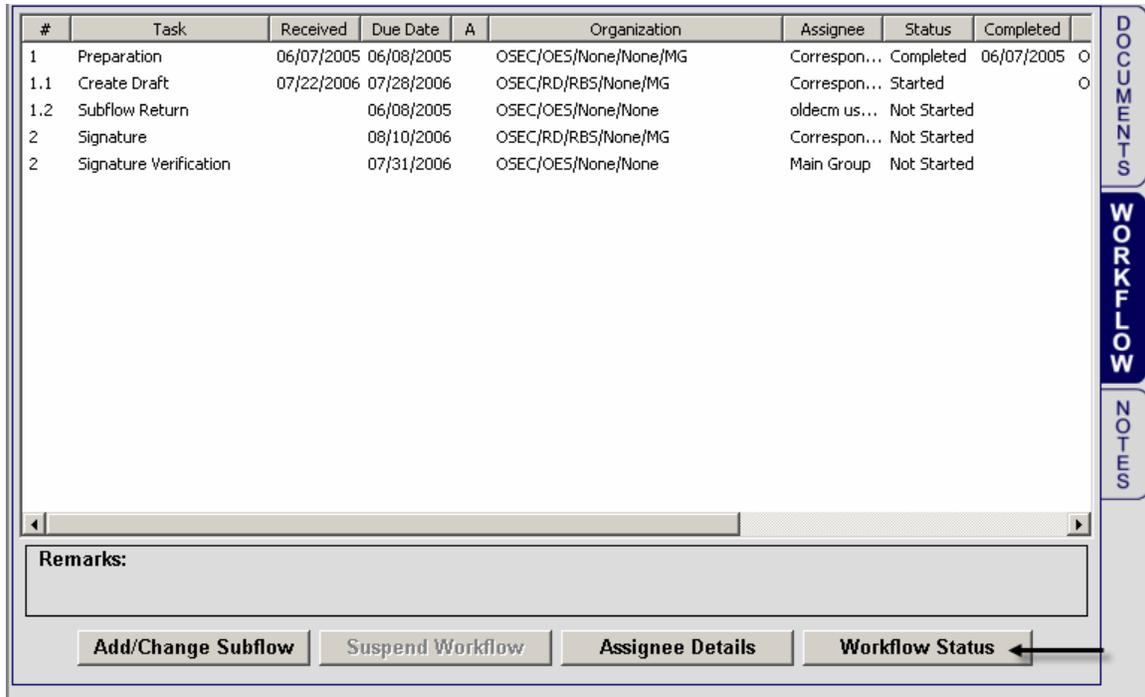
Change Workflow Suspend Workflow Assignee Details Workflow Status

DOCUMENTS
WORKFLOW
NOTES

Figure 52: Error Message for Assignee Details

WORKFLOW STATUS

A user can view the status of the entire workflow by clicking <Workflow Status> as seen in **Figure 53**.



The screenshot displays a software interface for viewing workflow status. It features a table with columns for task ID, task name, received date, due date, assignee, organization, status, and completion date. Below the table is a 'Remarks' field and a row of action buttons: 'Add/Change Subflow', 'Suspend Workflow', 'Assignee Details', and 'Workflow Status'. The 'Workflow Status' button is highlighted with a black arrow. On the right side, there is a vertical navigation menu with 'DOCUMENTS', 'WORKFLOW', and 'NOTES' options, where 'WORKFLOW' is selected.

#	Task	Received	Due Date	A	Organization	Assignee	Status	Completed
1	Preparation	06/07/2005	06/08/2005		OSEC/OES/None/None/MG	Correspon...	Completed	06/07/2005
1.1	Create Draft	07/22/2006	07/28/2006		OSEC/RD/RBS/None/MG	Correspon...	Started	
1.2	Subflow Return		06/08/2005		OSEC/OES/None/None	oldecn us...	Not Started	
2	Signature		08/10/2006		OSEC/RD/RBS/None/MG	Correspon...	Not Started	
2	Signature Verification		07/31/2006		OSEC/OES/None/None	Main Group	Not Started	

Workflow Status

Figure 53: Workflow Status

The report (**Figure 54**) shows information about the entire workflow for the folder and the task that is currently being worked as well as general information about the folder.

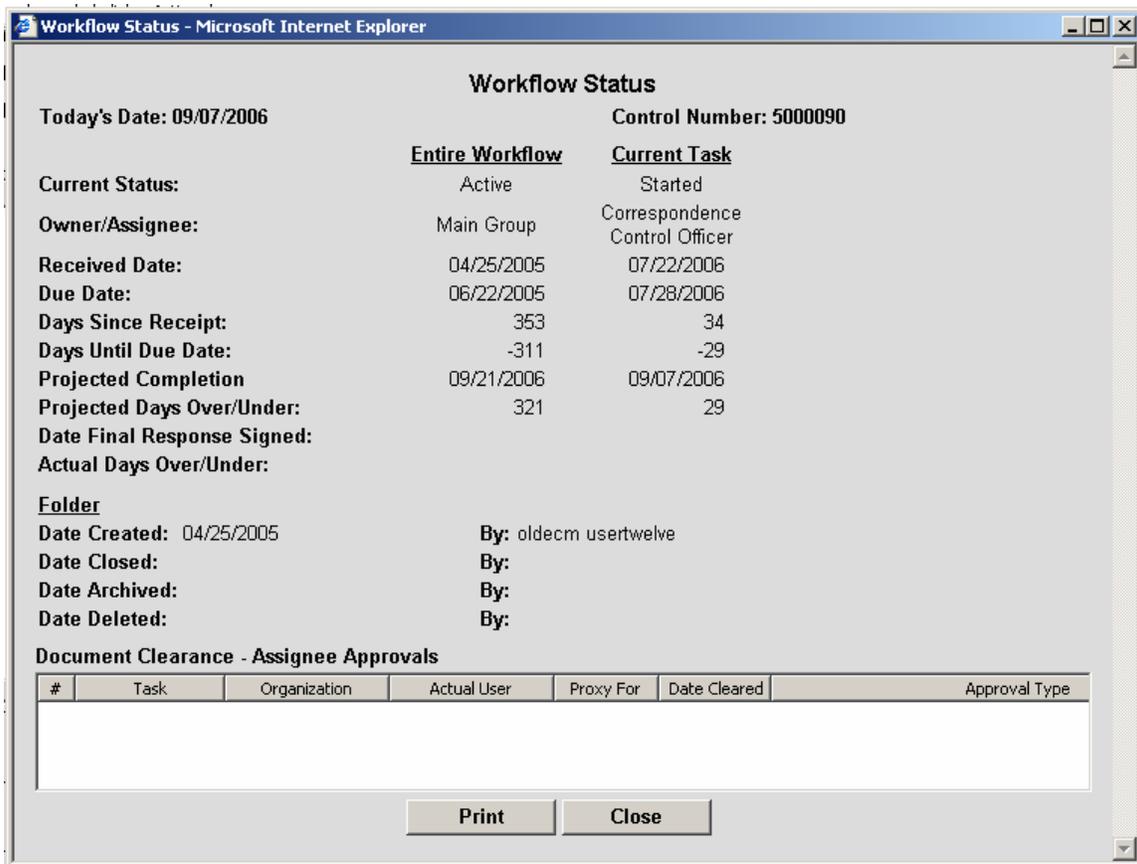


Figure 54: Workflow Status Report



COMPLETE TASK

When the user has completed all processing for an assigned task <Complete Task> is pressed. If no approvals or documentation is needed the box in **Figure 55** is displayed. Remarks are not required but are a useful tool to track progress.

Complete Task

Assignee: Main Group
Actual User: Ed Koenen
Proxy for: None

Remarks:

Task completed 09/06/06. Draft Document sent for approval.



* Completing this task will assign the next task in the workflow.

Figure 55: Complete Task

When <Complete Task> is clicked, the user is returned to the workflow if the next task is in the user's inbox. If the completed task is highlighted, the remarks are displayed in the 'Remarks' window as seen in **Figure 56**.

#	Task	Received	Due Date	A	Organization	Assignee	Status	Completed
1	Close Folder	09/06/2006	09/20/2006		OSEC/RD/None/None	Main Group	Completed	09/06/2006
2	Approve Application	09/06/2006	09/20/2006		OSEC/RD/None/None	Main Group	Completed	09/07/2006
3	Award Grant	09/07/2006	09/21/2006		OSEC/RD/None/None	Main Group	Assigned	
4	Assumptions/Transfers		10/05/2006		OSEC/OES/None/None	Main Group	Not Started	
5	Add Final to Folder		10/19/2006		OSEC/RD/None/None	Main Group	Not Started	
6	Close Folder		11/02/2006		OSEC/OES/None/None	Main Group	Not Started	

Remarks: Task completed 09/06/06. Draft Document sent for approval.

Quick Print

Figure 56: Remarks Window – Task Remarks

If approvals or documentation are required before the task is completed, the box shown in **Figure 57** is displayed and must be completed.

Complete Task

Assignee: Correspondence Control Officer
Actual User: Ed Koenen
Proxy for: None

Approval

Approved without Changes
 Approved with Recommended Changes Noted
 Approved Only with Changes Indicated in the Attached Document
 Approved Only with Changes Indicated in the Main Draft Document
 Not Approved

Supporting Documents Select

* Supporting Documents must be added to the Documents Tab before they can be selected.

	Doc Type	Title	Version	Author	Last Modified

Personal PIN:

Remarks:

Final Draft Completed 09/07/06.

Complete Task
Cancel

* Completing this task will assign the next task in the workflow.

Figure 57: Complete Task

PUT BACK TASK

A user has the option to return a task to the workflow after starting it by pressing the <Put Back Task> key. The task will be marked as 'Put Back' for reporting purposes. This returns the task to the group inbox unless it was assigned to a specific user.

Figure 58 shows that Task #1 has been started.

#	Task	Received	Due Date	A	Organization	Assignee	Status	Completed
1	Preparation	09/07/2006	09/08/2006		OSEC/RD/None/None	Main Group	Started	0
2	Approve Application		09/22/2006		OSEC/RD/None/None	Main Group	Not Started	
3	Add Final to Folder		09/25/2006		OSEC/RD/None/None	Main Group	Not Started	
4	Assumptions/Transfers		10/09/2006		OSEC/RD/None/None	Main Group	Not Started	
5	Award Grant		10/10/2006		OSEC/RD/None/None	Main Group	Not Started	
6	Add Final to Folder		10/11/2006		OSEC/RD/None/None	Main Group	Not Started	

Figure 58: Task # 1 Started

After pressing <Put Back Task>, task # 1 shows a status of 'Put Back' as seen in Figure 59.

#	Task	Received	Due Date	A	Organization	Assignee	Status	Completed
1	Preparation	09/07/2006	09/08/2006		OSEC/RD/None/None	Main Group	Put Back	0
2	Approve Application		09/22/2006		OSEC/RD/None/None	Main Group	Not Started	
3	Add Final to Folder		09/25/2006		OSEC/RD/None/None	Main Group	Not Started	
4	Assumptions/Transfers		10/09/2006		OSEC/RD/None/None	Main Group	Not Started	
5	Award Grant		10/10/2006		OSEC/RD/None/None	Main Group	Not Started	
6	Add Final to Folder		10/11/2006		OSEC/RD/None/None	Main Group	Not Started	

Figure 59: Task #1 Put Back

PRINT COVER SHEET

The <Print Cover Sheet> selection allows the user to print a cover sheet which shows folder information including the workflow tasks and status, as well as any notes that have been added.

PRINT FOLDER

If the Quick Print box is checked, clicking the Print Folder button will produce reports based on pre-selected criteria from the User's Personal Profile. See Figure 60.

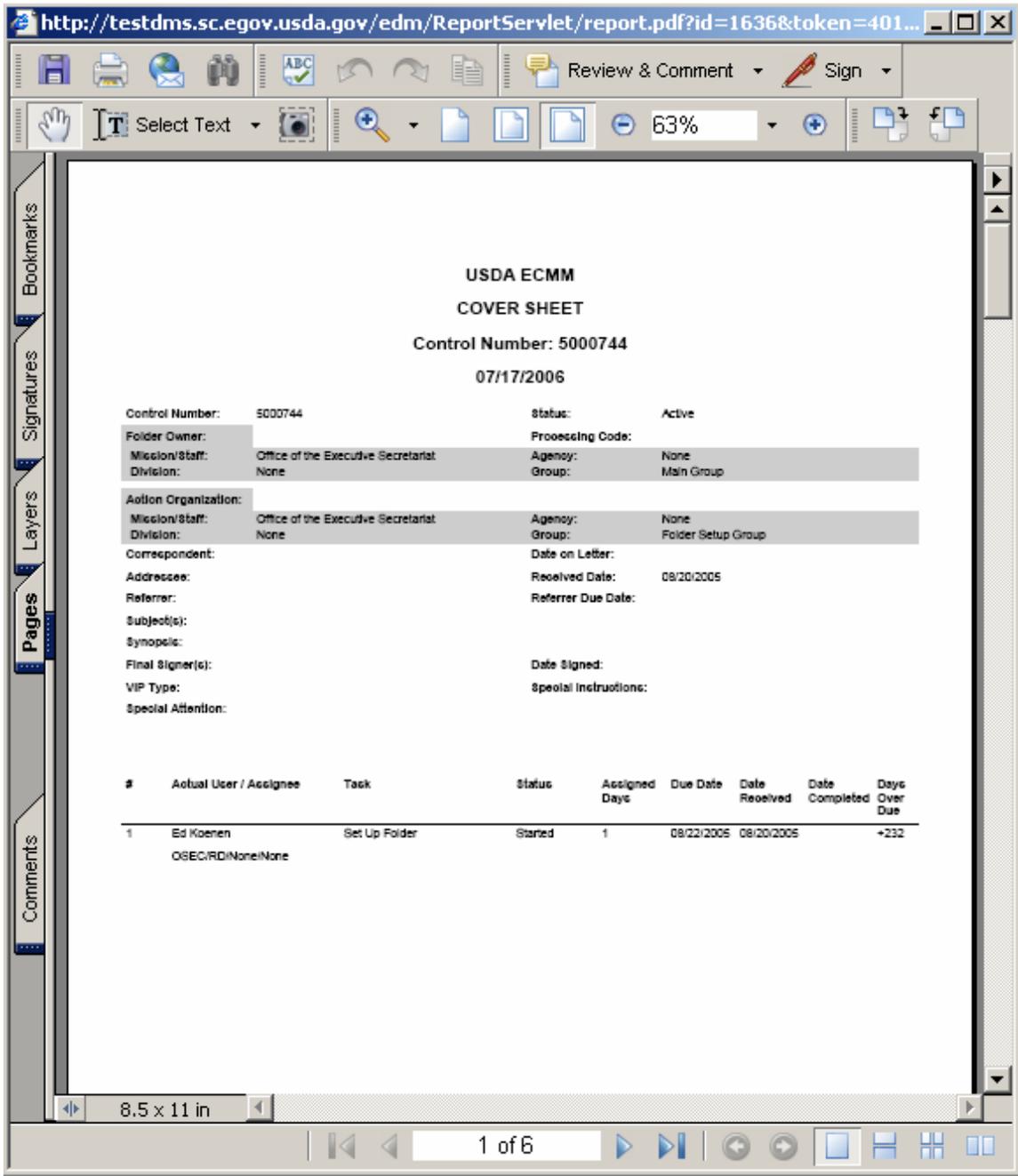


Figure 60: Print Folder output

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 is **Figure 61** The user then clicks the <Start Print> button.

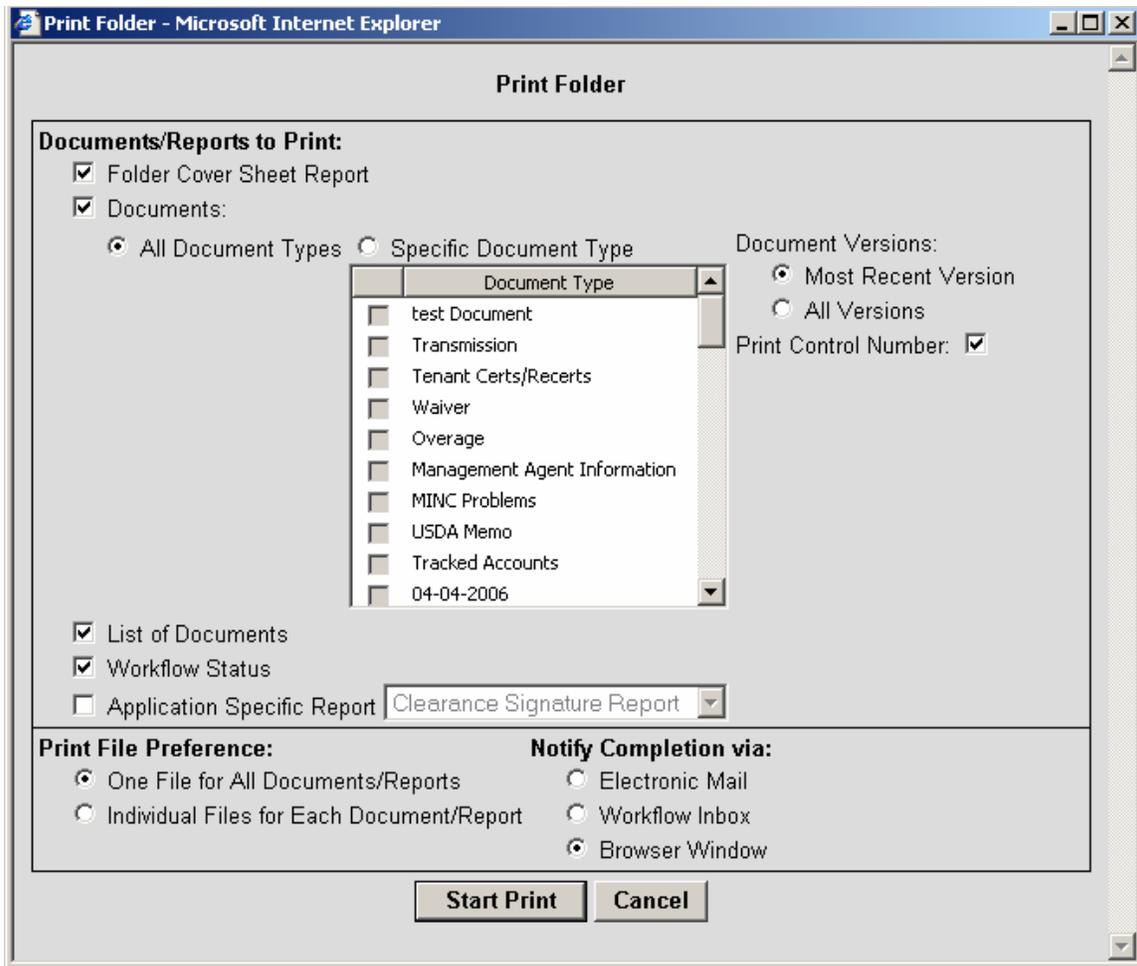


Figure 61: Print Folder Dialogue Print Selection Pop-up

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 61** or in the user's Personal Profile.

SECURITY

Clicking on <Security> reveals the security settings for the folder as seen in **Figure 62**. Authorized users can modify the security settings.

Folder Security			
Control Number:	5001953		
Folder Owner:	OSEC/RD/None/None/Main Group		
Action Organization:	OSEC/RD/None/None/Main Group		
Roles	No Access	View Only	View, Edit
Application Administrators	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Module Administrators	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Agency Group Administrators	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Group Administrators	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Folder Owner	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Task Assignees <small>When not the Assignee of the Current Task</small>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Other Agency Users			
Folder Owner Organization:			
Privileged Users	<input type="radio"/>	<input checked="" type="radio"/>	
All Group Users	<input type="radio"/>	<input checked="" type="radio"/>	
All Division Users	<input type="radio"/>	<input checked="" type="radio"/>	
Agency Users	<input type="radio"/>	<input checked="" type="radio"/>	
All Mission/Staff Users	<input checked="" type="radio"/>	<input type="radio"/>	
Action Organization:			
Privileged Users	<input checked="" type="radio"/>	<input type="radio"/>	
All Group Users	<input type="radio"/>	<input checked="" type="radio"/>	
All Division Users	<input type="radio"/>	<input checked="" type="radio"/>	
All Agency Users	<input type="radio"/>	<input checked="" type="radio"/>	
All Mission/Staff Users	<input checked="" type="radio"/>	<input type="radio"/>	
All Users	<input checked="" type="radio"/>	<input type="radio"/>	
<input type="button" value="Save"/> <input type="button" value="View Authorized Users"/> <input type="button" value="Additional Access List"/> <input type="button" value="Cancel"/>			

Figure 62: Folder Security

ADMIN

Clicking the <Admin> key displays the 'Folder Administration' Menu seen in **Figure 63**.

Folder Administration



Figure 63: Folder Administration

By clicking on the Menu options, an authorized user can:

- View removed documents and replace them on the Documents Tab
- View documents that have been moved to other folders
- View and print the history of any tasks that have been ‘Put Back’ by users
- Close a Folder
- Delete a Folder

REFRESH

Clicking <Refresh> will renew the screen and display any changes that may have occurred since the user opened the folder. Examples would be if another user completed a parallel task or added a document.

SAVE AND CLOSE

Clicking <Save and Close> will save all changes to the folder and close it. The user will be returned to the screen from which the user accessed the folder – usually the ‘Inbox’ or ‘Folder Results’.

CLOSE

Clicking <Close> closes the folder and returns the user to the screen from which the user accessed the folder – usually the ‘Inbox’ or ‘Folder Results’.

If the user attempts to close the folder and has made changes that are not saved, the pop-up in **Figure 64** is displayed. The pop-up gives the user the opportunity to click <Cancel> to stop the closing and return to the folder to save the changes. Clicking <Ok> allows the closing to proceed without saving the changes.



Figure 64: Unsaved Data Warning