

WebNow – Workflow

Overview

Workflow provides end-users with the ability to route a document through a business process from start to finish with a customizable set of options. As a user of workflow, you can place documents into workflow and move them through your business processes. As a workflow user, you can add a document to workflow, route it, respond to alarms and messages about the status of your items, and process it by, for example, viewing or annotating it. With almost any task in workflow, you have more than one way to complete it. Choose the path that best works for you.

Add an item to workflow

1. On the **WebNow** toolbar, click **Documents**.
2. In the **WebNow Explorer**, on the **Simple** search tab, set the **Search** lists and field to the criteria you need to retrieve your document, and then click **Go**.
3. From the search results, double-click a document to open it.
4. In the **WebNow Viewer**, verify that this document is the one you want to add to workflow.
5. Verify that the **Document Tasks** pane is open.

How?

- To display the **Document Tasks** pane, in the **WebNow Viewer**, on the **View** menu, click **Tasks**.

6. In the **Document Tasks** pane, click **Add this document to workflow**.
7. In the **Add to Workflow** window, select a process, select a queue, select a priority, and then click **Add**.

Tip – In the Documents grid, you can add any document by selecting the document, right-clicking on the document, and then clicking **Add to Workflow** in the menu.

Remove an item from workflow

1. On the **WebNow** toolbar, click **Workflow**.
2. In the **WebNow Explorer**, in the left pane under **Workflow**, select the workflow queue you want.
3. In the Workflow grid, double-click a document to open it.
4. In the **WebNow Viewer**, verify that this document is the one you want to remove from workflow.
5. Verify that the **Workflow Tasks** pane is open.

How?

- To display the **Workflow Tasks** pane, in the **WebNow Viewer**, on the **View** menu, click **Tasks**.

6. In the **Workflow Tasks** pane, click **Remove this item from workflow**.
7. In the **Remove from Workflow** confirmation box, click **Yes** to remove the item.

Tip - In the Documents grid, you can remove any document in a queue by selecting the document, right-clicking on the document, pointing to **Workflow**, and then clicking **Remove from Workflow** in the menu.

Archive an item in workflow

1. In the **WebNow Explorer**, in the left pane under **Workflow**, select the workflow queue you want.
2. In the Workflow grid, double-click a document to open it.
3. In the **Webnow Viewer**, verify that this document is the one you want.
4. Verify that the **Workflow Tasks** pane is open.

How?

- To display the **Workflow Tasks** pane, in the **WebNow Viewer**, on the **View** menu, click **Tasks**.
5. In the **Workflow Tasks** pane, click **Archive this item** and then, in the confirmation box, click **Yes**.

Change document keys in workflow

You can change the DockKeys in a document that resides in a workflow queue if the applet properties for the queue are set to allow linking from the queue. If this option is not available, contact your ImageNow administrator to set up this linking.

1. In the **WebNow Explorer**, in the left pane under **Workflow**, select the workflow queue you want.
2. In the Workflow grid, double-click a document to open it.
3. In the **WebNow Viewer**, verify that this document is the one you want.
4. In the **Document Keys** pane, change the DockKeys as needed.
5. Close the document, and then in the confirmation box, click **Yes**.

Route a document in workflow

1. In the **WebNow Explorer**, in the left pane under **Workflow**, select the workflow queue you want.
2. In the Workflow grid, double-click a document to open it.
3. In the **WebNow Viewer**, verify that this document is the one you want to route to a different queue.
4. Verify that the **Workflow Tasks** pane is open.

How?

- To display the **Workflow Tasks** pane, in the **WebNow Viewer**, on the **View** menu, click **Tasks**.
5. On the **Workflow Tasks** pane, perform one of the following:
 - To send the document to the next queue in the workflow process flow, click **Route forward**.
 - To send the document back to any queue from which it came previously, click **Route up**.
 - To send the document back to the previous queue, click **Route back**.
 - To select a queue in the workflow process to which to send the document, click **Route anywhere**.

Tip – In the Workflow grid, you can route any document in a queue by selecting the document, and right-clicking on the document, and then clicking the routing option you want in the menu.

Set the status of a document in workflow

1. In the **WebNow Explorer**, in the left pane under **Workflow**, select the workflow queue you want.
2. In the Workflow grid, right-click the document, point to Workflow and select one of the following options:
 - **Mark item as idle**
 - **Mark item as on hold**
 - **Mark item as pending**
3. In the confirmation box, click **Yes**.

View an item in workflow

1. In the **WebNow Explorer**, in the left pane under **Workflow**, select the workflow queue you want.
2. In the Workflow grid, double-click a document to open it.

Recall an item in workflow

1. In the **WebNow Explorer**, in the left pane under **Workflow**, select the workflow queue you want.
2. In the Workflow grid, right-click a document, click **Workflow**, and then click **Recall workflow item**.

Place a workflow item on hold

If you are in the middle of processing a document but need to stop, you can place a workflow item on hold.

- In the **WebNow Viewer - Workflow** mode, click to close the viewer and when you get a prompt, click **Put on Hold**, and then in the **Hold Item** dialog box, enter the date, reason, and any comments.

View recently routed items

1. In the **WebNow Explorer**, in the left pane under **Workflow**, select the workflow queue you want.
2. In the Workflow grid, double-click a document to open it.
3. In the **WebNow Viewer**, verify that this document is the one you want.
4. Verify that the **Workflow Tasks** pane is open.

How?

- To display the **Workflow Tasks** pane, in the **WebNow Viewer**, on the **View** menu, click **Tasks**.
5. In the **Workflow Tasks** pane, click **View recently routed items**.

View workflow history

1. In the **WebNow Explorer**, in the left pane under **Workflow**, select the workflow queue you want.
2. In the Workflow grid, double-click a document to open it.
3. In the **WebNow Viewer**, verify that this document is the one you want.
4. Verify that the **Workflow Tasks** pane is open.

How?

- To display the **Workflow Tasks** pane, in the **WebNow Viewer**, on the **View** menu, click **Tasks**.
5. In the **Workflow Tasks** pane, click **View workflow history**.
 6. In the **Properties** dialog box, view the workflow item history, and then close the dialog box.

Process an item in workflow

To process an item in workflow, the Process privilege is required for the queues you want to work with.

1. Verify that the document is added to workflow.
2. In **WebNow Explorer**, in **Documents** view, right-click the document you want to process, and then click **Open in Workflow**.
3. In the **WebNow WebNow - Workflow** mode, do one or more of the following:
 - View the document

- Add any annotations
 - Rotate and/or resize the document
 - Apply any other options you want available in the Viewer
4. On the **File** menu, click **Close Viewer**, and then return to the Explorer or main toolbar.

Mark an item as pending

1. In the **WebNow Explorer**, in the left pane under **Workflow**, select the workflow queue you want.
2. In the Workflow grid, right-click the document, select **Workflow**, and then click **Mark Item as Pending**.
3. In the confirmation box, click **Yes**.