

ImageRight Desktop Workflow

Workflow Concepts

- **Workflow** – the path work takes through your office to help it get processed
- **Step** – where tasks stop within the workflow to be processed
- **Task** – notification of work to be done
- **Unassigned task** – not designated for a specific person, visible by all
- **Assigned task** – designated for a specific person, not visible by all
- **Priority** – level of importance (0-9) assigned to a task
- **Set task attributes** – task leaves the current step and moves to the next

Create New Workflow Task

You can create a task on a page when printing into the ImageRight system.



1. Print the document using the ImageRight Printer as you normally would and select the appropriate filing options.
2. On the Task tab check the Create Task box.
3. Select the appropriate workflow, step, user, and priority. You can schedule the task.
4. Type a task description.
5. Click Import/Task.

Indexing


Indexing is typically the first step in the workflow when mail gets associated to a file.

To Do List

You can find your work in the To Do List, a list of tasks ready to be processed.


1. Click the To Do List tab or click  To Do List on the Workflow menu.
2. Choose the workflow, step, and user.
3. Click the  Fetch button.

Each row displayed in the list is a task. The list is sorted by priority then date initiated.

Click  (the Browse Image button) to view the first page of the task.

Lock a Task



Locking a task is like taking it out of your inbox so that you can work on it. No one else can work a task that you have locked.

1. Select a task in the To Do List.
2. Right-click and click  Lock and Open or simply double-click the task.



Properties of a Locked Task

The header color is green.

You can lock a task anytime a file is open, if you have the proper security rights.



1. Open a file that has a task.
2. In the Navigation pane, right-click the task, identified by , to be locked, and then click  Lock Tasks.

The description:

- Is in the Navigation pane below the file tree. Click  or  to expand and collapse the description.
- Can be updated to include processing instructions for the next step by using a slow double-click.
- Will remain throughout the workflow until changed again.


Work a Locked Task

You can close the file to unlock the task and return it to the To Do List.

1. Display the To Do List and lock and open a task.
2. Review the task description for additional processing information and do your work to process the task.
3. On the Task menu, click  Set Task Attributes. Select options to move the task to the next step in the workflow and close the file.
4. What is next?
 - Send a task to the next step and assign it to someone.
 - Route a task manually.
 - Send to the End step (finish).
5. If the task can go to the next step unassigned or without further information, click  Release on the Task menu, to move the task to next step in the workflow and close the file.


Set Task Attributes

If task attributes are required, the attributes you enter will determine the path the task follows when it is released.

1. Lock and open a task that has related attributes.
2. On the Task menu, click  Set Task Attributes.
3. Enter the attributes.
4. Select Release on Apply if the task should be moved to the next step.


Manual Routing

Manual routing is used to move a task to another person or another step in the workflow that is not the typical route.

1. Lock and open a task.
2. On the Task menu, click  Manual Routing.
3. Choose the workflow, step, assignment (Assign to *user*), and priority.
4. Enter a description.


Change Priority

You can change the priority of a task to indicate increased or decreased importance and help you organize your work.


1. Lock and open a task.
2. On the Task menu, click  Change Priority.
3. Select the new priority.

Reschedule

If you reschedule a task, it will return to you on the specified (future) date, but it will not continue to the next step in the workflow.


1. Lock and open the task to be rescheduled.
2. On the Task menu, click  Reschedule.
3. Select the reschedule date and other properties to be applied to the task (time, workflow, step, priority, etc.)
4. Enter an easily understandable description to explain why the task was rescheduled. Include words like: Rescheduled because/for.

You can locate rescheduled tasks before the future date is reached.

1. View the To Do List, point at Include, and then click  Future Items on the Workflow menu.
2. Click Fetch to refresh the list.


Task Notes

Task notes provide an activity record related to the task, similar to file notes for the file. Your organization may choose to use task notes to facilitate communication and write feedback while processing tasks

1. Select the task in the Navigation pane.
2. On the Task menu, click  Task Note.
3. Type your note and click Apply.


Kill

To remove a task from the workflow, you can use the Kill command. The file is not affected.



1. Lock and open the task to be killed.
2. On the Task menu, click  Kill.
3. Enter a description and note as needed.

Diary

By creating a diary, you set a reminder for a task or file, but the original task continues in the workflow. You can create a diary on any level at any time.




1. Select the level where you would like to create the diary.
2. On the Workflow menu, click  New Diary Item.
3. Enter the properties: description, notes, number of days, time, etc., in the Diary dialog box.
4. View the diary item in the Navigation pane.
5. Release the diary.

You can also view diary items in the To Do List.

1. View the To Do List.
2. On the workflow menu, point at Include and click either  Diary Items or  Diary Items Only.
3. Click Fetch to refresh the list.

Auto Process

When you start Auto Process, tasks will be continuously locked and opened as each one is completed. If the task is in an Indexing step, the related indexing information dialog box will be opened.

1. Click the To Do List tab.
2. Select the workflow, step, and user.
3. Click  Auto Process.
4. Process and release the task presented.
5. To skip a task, click  Next Task on the Workflow menu.
6. To retrieve a previously skipped task, click  Previous Task on the Workflow menu.
7. To end automatic processing, close the file.