

Manage Workflows

Workflows are designed to be distributed to your users when it is their turn to do a task for a document.

From the menu on the left-side of the screen, click Admin, then click Workflows under the first column: Fileroom Management.

Add Workflow

1. To begin, click the Add Workflow button.

Workflow

* Workflow Name ?

* Description ?





















☐ Manual Start ?

☐ Hide ?

Save

Clear

2. In the pop-up window, enter the Workflow Name and Description.
 - Manual Start: If this box is checked, users will be required to manually start their task in the workflow.
 - Hide: If this box is checked, the document assigned to the workflow will be hidden to users not assigned to the workflow until all tasks in the workflow has ended.
3. Click the Save button when finished.
4. After saving, click the Task Details button under the Actions column for the workflow.

Workflow Name		Search Workflows		Search	Clear	Add Workflow	Workflow Statuses	Business Rules
Workflow Name	Manual Start	Hide	Description	Actions				
CCI Tech Assignment	No	No	Job Reports					
CCI Workflow	No	No	Assign Technician to Scheduled Job					
John's Workflow	No	No	Review and send to customers					
New Hire Process	No	No	Collection of new hire documents, proper identification records, and creating folder in system for each new employee					

5. In the pop-up window...

Task Details

Assigned User

<-- Select -->

Sequence

Duration In Days

Task

Decision A

<-- Select -->

Task A

<-- Select -->

Decision B

<-- Select -->

Task B

<-- Select -->

☐ Check In

☐ Send SMS

☐ Business Days

☐ Stop

☐ Folder Mail

Check In Task

<-- Select -->

Save

Clear

Task	Assigned User	Sequence	Days	Business Days Only	Decision	SMS	Stop	Folder Mail	Delete
Create folder in PinPoint for new hire	John Smith	5	1	Yes	No	No	No	No	
Collect new hire paperwork, scan into PinPoint	Bridget Jones	10	3	Yes	No	No	No	No	
Send Employee Handbook Packet to New Hire	Bridget Jones	15	3	No	No	No	No	No	
Collect Signed Employee Contract & Scan into PinPoint	John Smith	20	2	No	No	No	No	No	

- Select the Assigned User.
- Enter the Sequence number (step order lowest to highest).
- Enter the Duration in Days for the task.
- Enter the Task description.
- Click the Save button when finished.

If you need to make the task a group task, click the Task, then use the Add Users button to include other users. Only one user will need to complete the task for the whole group.

Task Details

Assigned User

John Smith

Sequence

5

Duration In Days

1

Task

Create folder in PinPoint for new hire

Decision A

<-- Select -->

Task A

<-- Select -->

Decision B

<-- Select -->

Task B

<-- Select -->

☐ Check In

☐ Send SMS

☒ Business Days

☐ Stop

☐ Folder Mail

Check In Task

<-- Select -->

Add Users

Save

Clear

Task	Assigned User	Sequence	Days	Business Days Only	Decision	SMS	Stop	Folder Mail	Delete
Create folder in PinPoint for new hire	John Smith	5	1	Yes	No	No	No	No	
Collect new hire paperwork, scan into PinPoint	Bridget Jones	10	3	Yes	No	No	No	No	
Send Employee Handbook Packet to New Hire	Bridget Jones	15	3	No	No	No	No	No	
Collect Signed Employee Contract & Scan into PinPoint	John Smith	20	2	No	No	No	No	No	

After you have finished adding the task details for the workflow, you can assign supervisors to the workflow using the Assign Supervisors button under the Actions column.

Workflow Name	Manual Start	Hide	Description	Actions
CCI Tech Assignment	No	No	Job Reports	
CCI Workflow	No	No	Assign Technician to Scheduled Job	
John's Workflow	No	No	Review and send to customers	
New Hire Process	No	No	Collection of new hire documents, proper identification records, and creating folder in system for each new employee	

Assign Workflow

Workflows can be assigned to automatically begin when a specific Doc Type is added, they can be assigned as recurring workflows based on a set number of days, or a user can assign a custom workflow date for a document.

Assign Workflow to a Doc Type:

1. From the user menu on the left side of the page, start by clicking Admin, then click the Doc Types button under the menu, or on the Admin Dashboard.
2. Select the document type you want to assign an automatic workflow to by selecting it under the Doc Types column.
3. In the pop-up window, select the workflow you want to assign to the document type by using the Workflow field.
 - If you would like to set a recurring workflow for the document type, use the Recurring Workflow field instead, then set the Number of Days.
4. Click the Save button when ready.

Assign Workflow to an Individual Document:

1. Open the document to the File Review page.
2. On the left side of the page, select the workflow you want to assign using the Workflow field.
 - If you would like to assign a start date for the workflow, use the Delayed Workflow Date field.
3. Click the Save button at the top or bottom the page when ready.

Decision Task

Rather than assign users a normal workflow task, you can assign them a “decision task” which gives them two options for completing their Task. When setting up a decision task, you will assign a task to Option A and a different task to Option B.

Task Details

*Assigned User John Smith

*Sequence 5

*Duration In Days 1

*Task Create folder in PinPoint for new hire

Decision A New Hire Process

Task A 5: Create folder in PinPoint for new h

Decision B John's Workflow

Task B 1: Review & Sign

☐ Check In

☐ Send SMS

☒ Business Days

☐ Stop

Check In Task <--- Select --->

Add Users

Save

Clear

Task	Assigned User	Sequence	Days	Business Days Only	Decision	SMS	Stop	Delete
Create folder in PinPoint for new hire	John Smith	5	1	Yes	No	No	No	
Collect new hire paperwork, scan into PinPoint	Bridget Jones	10	3	Yes	No	No	No	
Send Employee Handbook Packet to New Hire	Bridget Jones	15	3	No	No	No	No	
Collect Signed Employee Contract & Scan into PinPoint	John Smith	20	2	No	No	No	No	

1. Start by selecting the Assigned User.
 - If you need to make the task a group task, use the Add Users button to include other users. Only one user will need to complete the task for the whole group.
2. Enter the Sequence number (step order is lowest to highest).
3. Enter the Duration in Days for the task.

4. Enter the Task description.
5. Select the workflow for Decision A, then select the task using the Task A field.
6. Select the workflow for Decision B, then select the task using the Task B field.
7. Click the Save button when finished.

When the user is assigned a task, the user will be required to select Option A or Option B.

Check-In Task

If a particular task requires a user to check the document out for updating, you can have the workflow restart a specific task when the document is checked back into PinPoint.

The screenshot shows the 'Task Details' form in PinPoint. The 'Check In' checkbox is selected, and the 'Check In Task' dropdown is open, showing a list of tasks to select from. The tasks listed are: '5. Create folder in PinPoint for new hire', '10. Collect new hire paperwork, scan into PinPoint', '15. Send Employee Handbook Packet to New Hire', and '20. Collect Signed Employee Contract & Scan into PinPoint'. The 'Save' button is visible at the bottom right of the form.

Task	Assigned User	Sequence	Days	Business Days Only	Decision	SMS	Stop	Delete
Create folder in PinPoint for new hire	John Smith	5	1	Yes	No	No	No	
Collect new hire paperwork, scan into PinPoint	Bridget Jones	10	3	Yes	No	No	No	
Send Employee Handbook Packet to New Hire	Bridget Jones	15	3	No	No	No	No	
Collect Signed Employee Contract & Scan into PinPoint	John Smith	20	2	No	No	No	No	

1. Start by selecting the Assigned User.
 - If you need to make the task a group task, use the Add Users button to include other users. Only one user will need to complete the task for the whole group.
2. Enter the Sequence number (step order lowest to highest).
3. Enter the Duration in Days for the task.
4. Enter the Task description.
5. Check the box for Check In, then select the task to trigger when the document is checked back in using the Check In Task field.
6. Click the Save button when finished.

If the user assigned to the task checks a document out and then back in when the task is assigned, the Check In Task will trigger automatically.

Workflow Statuses

1. Click the Workflow Statuses button located at the top of the page.

Workflow Statuss

Workflow Status ?

Save

Clear

Workflow Status ?

Search Workflow Statuses

Search

Clear

Workflow Status	Delete
Closed	
On Hold	
Reminder	
Submitted	

- Enter the Workflow Status name.
- Click the Save button.

Workflow Business Rules

Workflow Business Rules are used to auto trigger workflows based on specific document metadata.

Business Rules

Business Rule ?

Workflow ? <--- Select --->

Doc Type ? <-- Select Document Type -->

Priority Order Number ?

☐ Active ?

Add Conditions

Doc Fields ? <--Select -->

AND

Operator ? <-- Select Operator -->

Value 1 ?

Value 2 ?

Add

Doc Field	Option	Operator	Value 1	Value 2	Delete

Date Added:

Date Edited:

Last User:

Save

Cancel

Business Rule	Active	Workflow	Priority	Doc Type	Delete
Notify of new submission	Yes		5	Submission	

- Click the Business Rules button located at the top of the page.
- Enter the Business Rule name.
- Select the Workflow.
- Select the Doc Type.
- Enter the Priority Order Number.
- Check the Active box.
- Under Add Conditions, select the Doc Field you wan to use for the rule.
- Select the Operator, then enter the data in Value 1.
- Click the Add button when finished.

When a new file is added as the Doc Type you selected for the business rule and it contains the data you entered for Value 1 in the metadata field you assigned, the workflow you set in the business rule

will automatically be triggered.