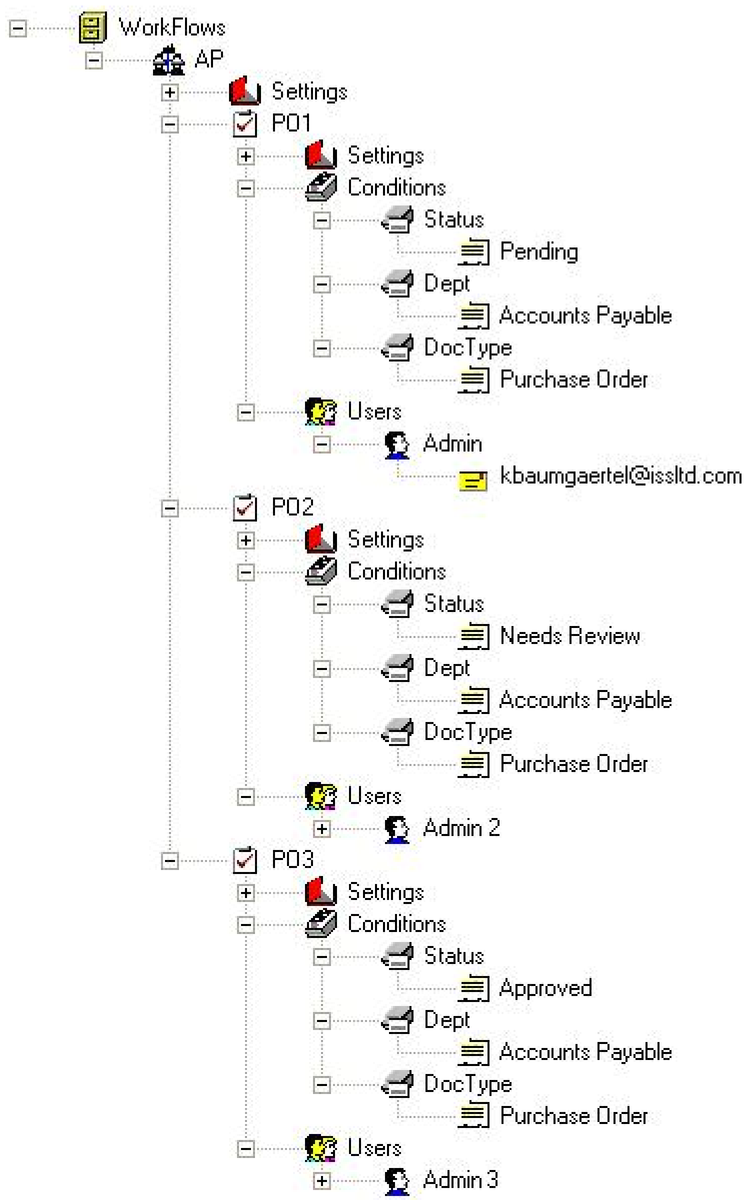
eCIP Workflow Overview

First create a WorkFlow (Accounts Payable). Then create tasks (PO1, PO2, PO3) under the WorkFlow. In each Task adjust settings, create Users, and create conditions.

- A WorkFlow consists of multiple tasks.
- Each task has its own set of settings, conditions and users.

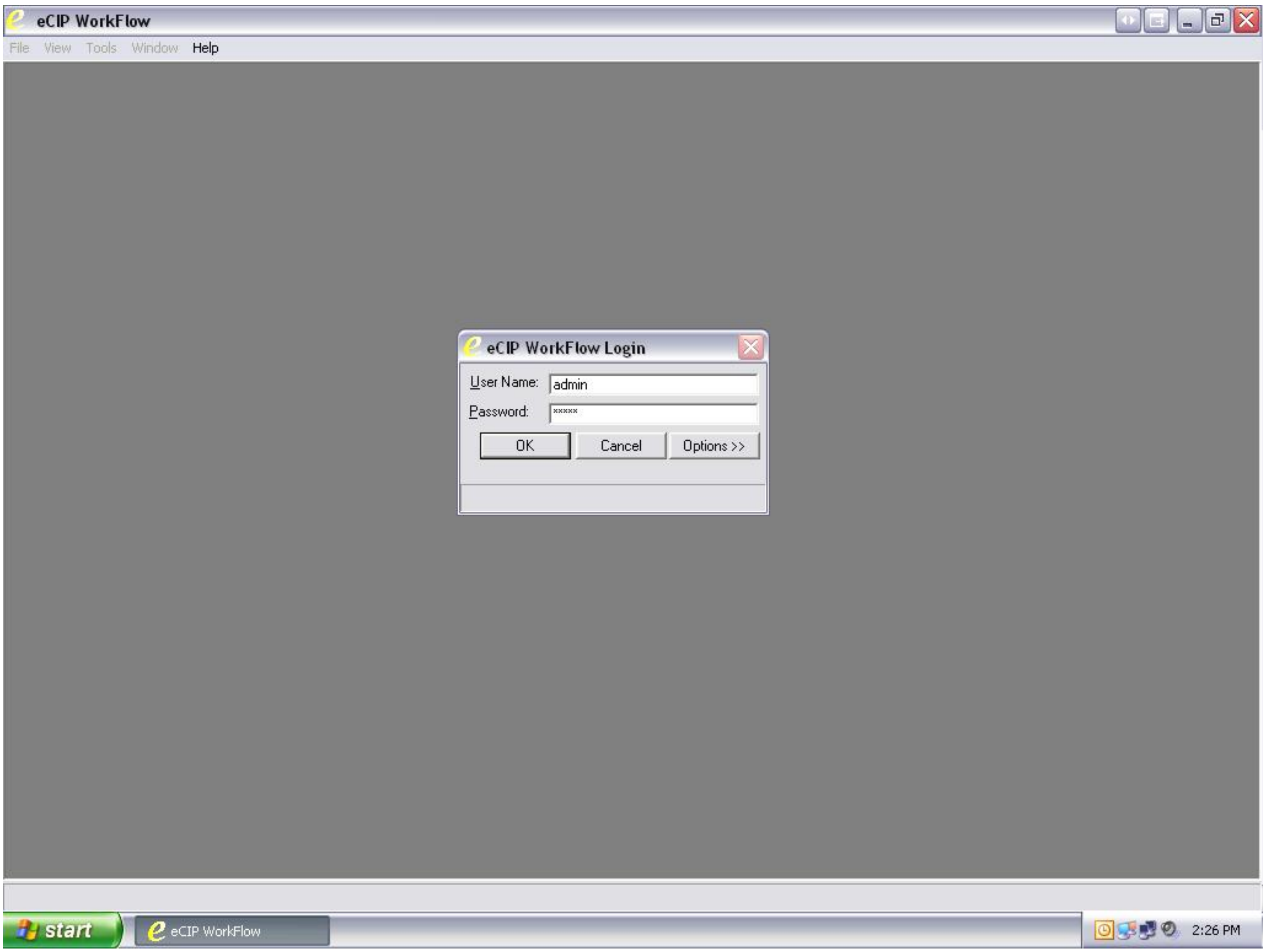
1) eCIP WorkFlow looks at a task's set folder. The folder contains files with conditions.
2) eCIP WorkFlow will look at a file's conditions (status - pending). It will then match the file to the task with same conditions as the file (PO1).
3) The users of this task will be emailed links to those files (Admin – kbaumgaertel@issltd.com).
4) When the file's conditions are changed (status – needs review), eCIP WorkFlow will detect the change and then look for a new task matching those new conditions (PO2).
5) An email will then be sent to the new tasks users. (Admin 2)



Guide

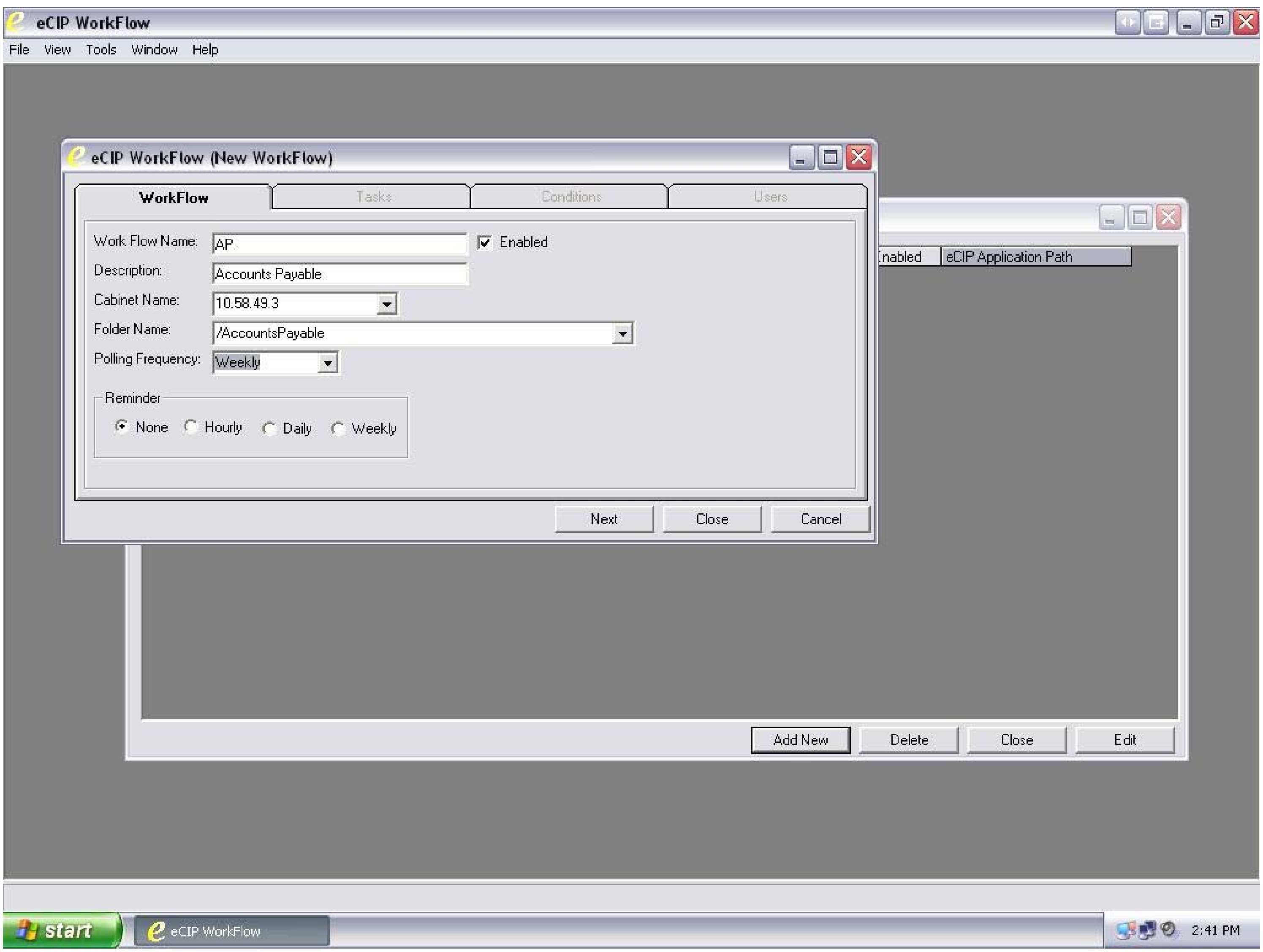
This guide will demonstrate how to set up a WorkFlow for Accounts Payable. It will also show receiving an email and viewing the file in eCIP.

When opening eCIP WorkFlow you will see a log in dialogue box. Enter in the appropriate information and press ok.



Expert View
Setting up a WorkFlow

Step 1: To create a new WorkFlow, click View/Expert.
Step 2: Click Add New at the bottom of the eCIP WorkFlow Setup window to add a new WorkFlow.
Step 3: Enter in the Work Flow Name. In this case we will call it AP, because we are setting up a WorkFlow for Accounts Payable. Select Enabled to enable WorkFlow AP.
Step 4: Enter in a description of the WorkFlow. We will call it Accounts Payable in this case.
Step 5: For Cabinet Name, we will enter in the IP address of the eCabinet holding the documents we will be using for this WorkFlow.
Step 6: Choose the name of the folder holding the documents. We are going to pick /AccountsPayable.
Step 7: Select the Polling Frequency of the files. This will change the frequency new files are checked for in the eCabinet.
Step 8: Select a Reminder setting. The selected reminder option will choose when you are sent a reminder email for new documents that have not been reviewed.
Step 9: Press the next button to save all entered information and enable the Task tab.



Adding Tasks to a WorkFlow

A task represents one step of a WorkFlow. Each task has its own set of settings, conditions and users.

In the Tasks tab we created three new tasks. PO1, PO2, and PO3. In this section we will review how to add a task.

Step 1: Click the Tasks tab toward the top of the eCIP WorkFlow window.

Step 2: To add a task to a WorkFlow, click the Add button, toward the bottom of the window.

Step 3: Enter in the Task name. For this example we entered in PO2. The description of PO2 will be Purchase Order 2.

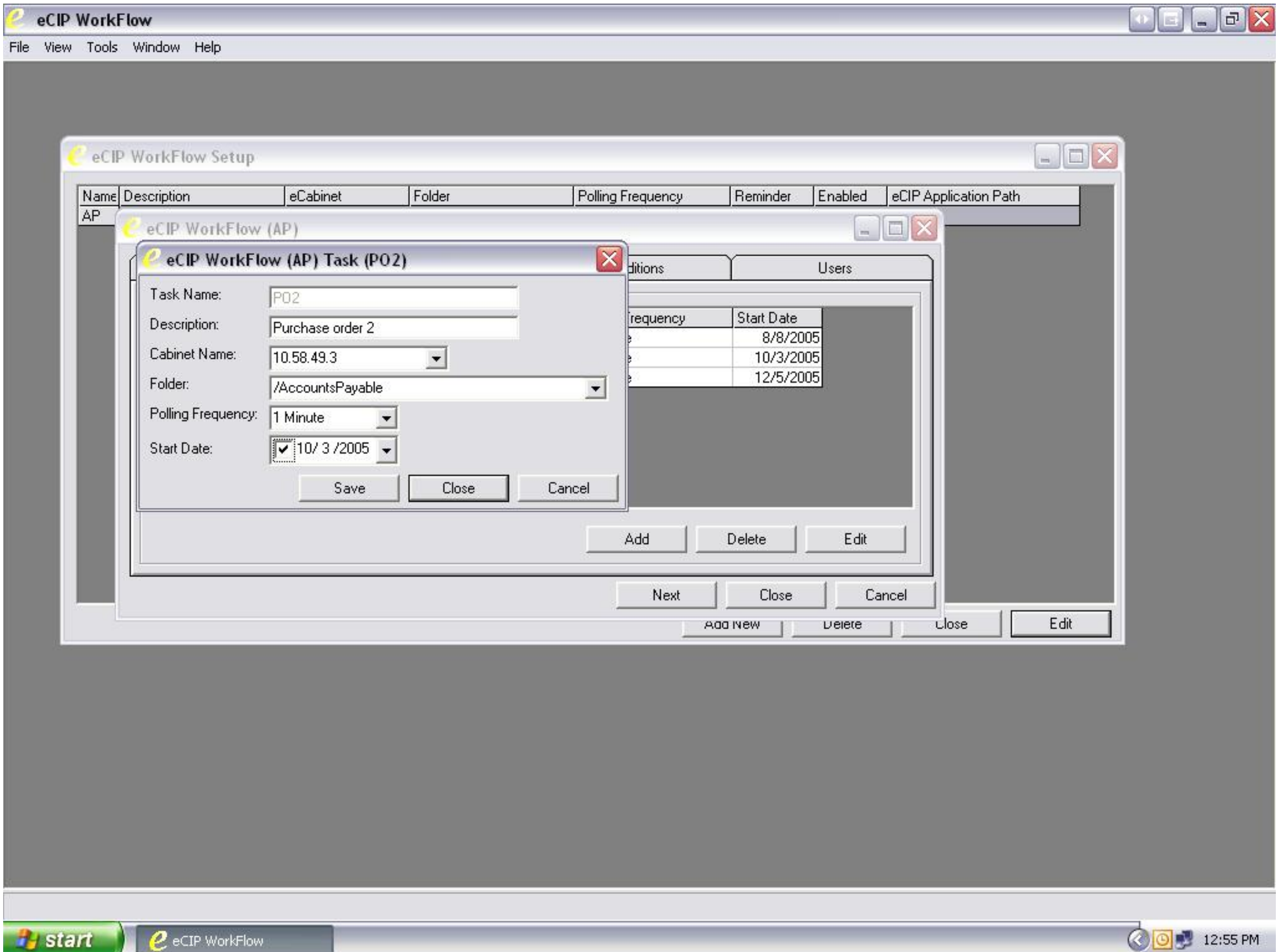
Step 4: For Cabinet Name, we will enter in the IP address of the eCabinet holding the documents we will be using for this task.

Step 5: Choose the name of the folder holding the documents. We are going to pick /AccountsPayable.

Step 6: Select the Polling Frequency of the files. This will change the frequency that new files are checked for in the eCabinet.

Step 7: Choose a start date of the Task. For this example we choose 10/3/2005.

Once all appropriate fields are entered, press Close. This will save your new task and bring you back to the eCIP WorkFlow window. You can now add additional tasks, delete tasks, and edit existing tasks.



Adding Conditions to Tasks

The purpose of a condition is to determine which task is associated with a file in the eCabinet.

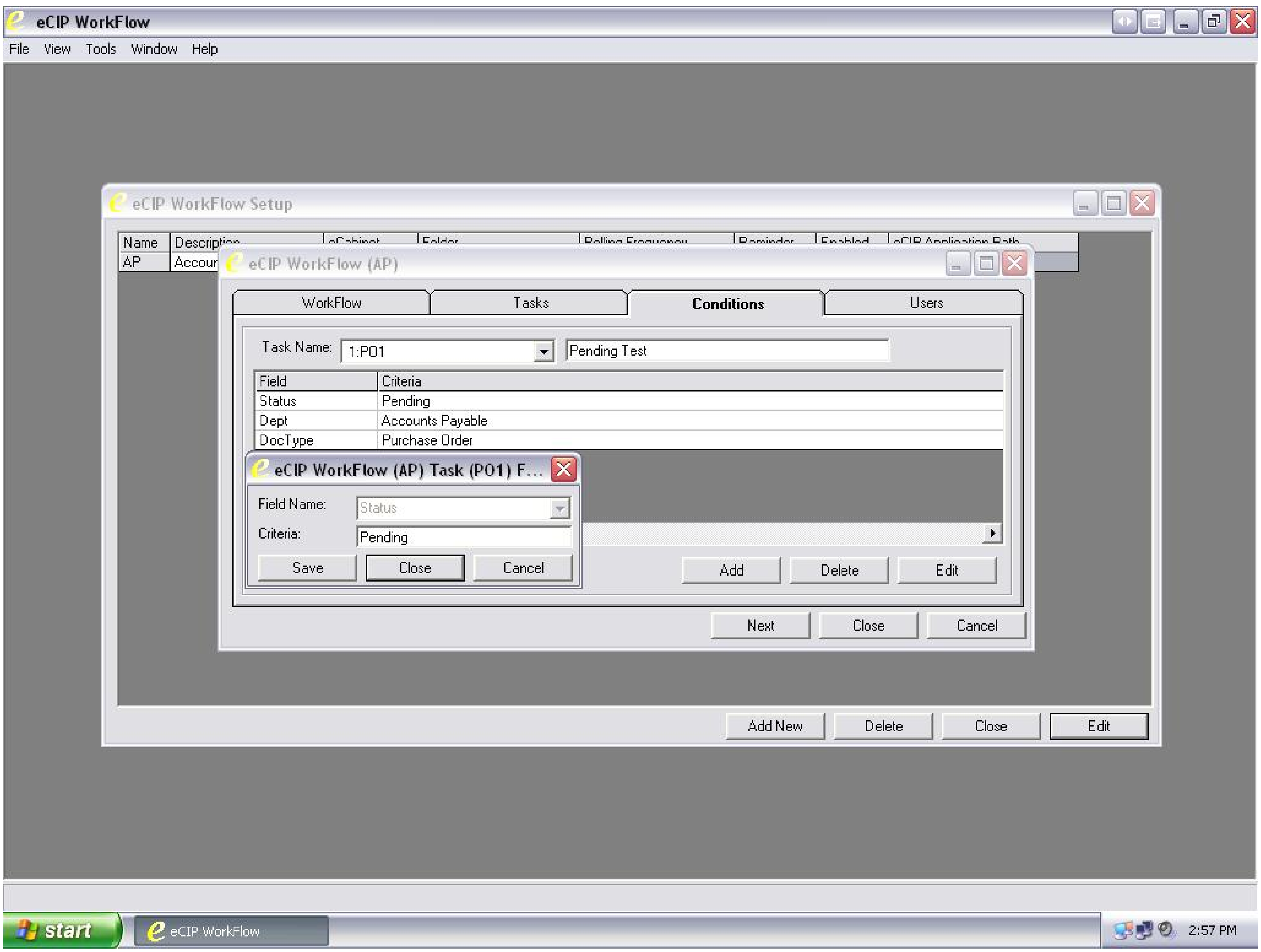
Step 1: Click the Conditions tab toward the top of the eCIP WorkFlow window.

Step 2: For this example we will be adding 1 condition to the task “PO1”. In the picture 3 conditions are shown.

Step 3: To add a condition to PO1, select PO1 from the Task Name drop down menu, then press add.

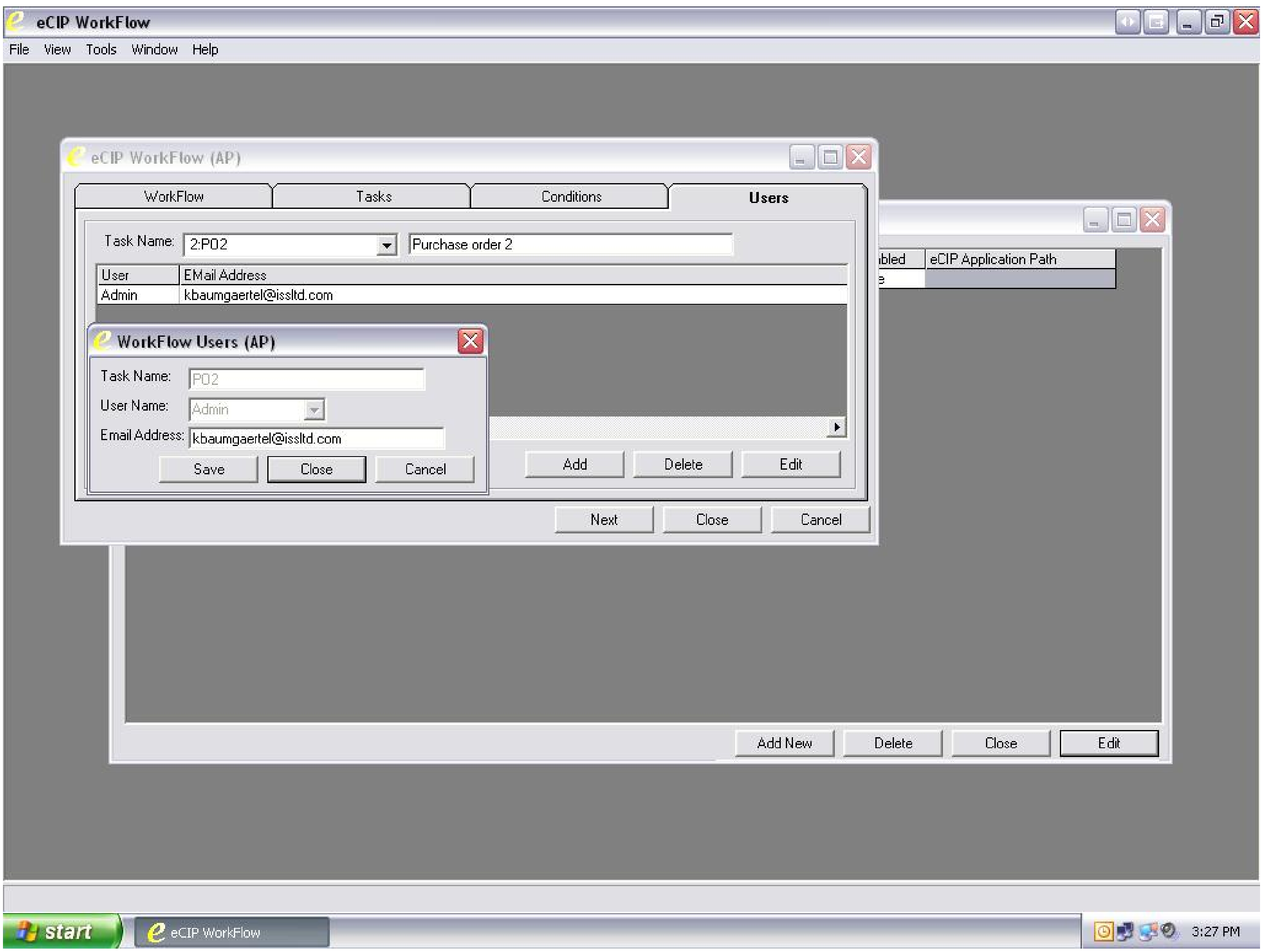
Step 4: We chose Status for the field name. Once the field name is selected, a list of criteria is available. We chose pending for status.

Step 5: Once both fields are filled, press close to save the condition and return to the eCIP WorkFlow window. Now additional tasks can be added, deleted or edited. To add conditions to other tasks, select a different task from the Task Name drop down box.



Adding Users to Tasks

Step 1: Click the Users tab toward the top of the eCIP WorkFlow window.
Step 2: In this example we will add a user called “Admin” to the Task name PO2.
Step 3: To add a User to this task we selected “PO2” by clicking the drop down box next to Task Name.
Step 4: Once selecting the task name, click add.
Step 5: In the WorkFlow Users window, we selected “Admin” from the drop down menu box.
Step 6: Now the Admins email address is entered. We used kbaumgaertel@issltd.com for this.
Step 7: Press Close to save the user and return to the eCIP WorkFlow window. Now additional Users can be added, deleted or edited. To add Users to other tasks, select a different task from the Task Name drop down box.

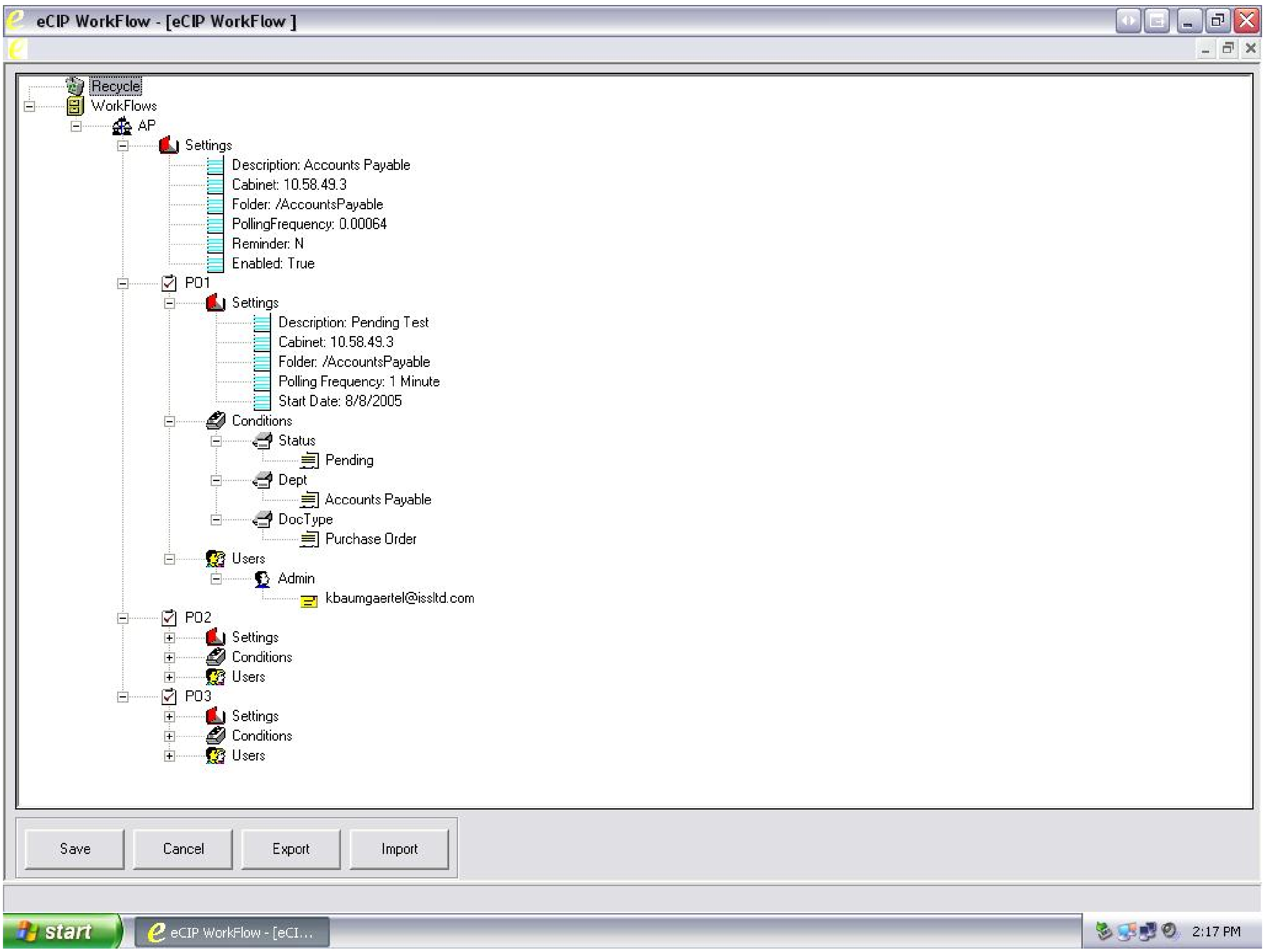


After completing all the required fields for the WorkFlow, Tasks, Conditions, and Users tabs, click close to save the WorkFlow and return to the eCIP WorkFlow setup.

Graphical View

The Graphical view displays WorkFlows in a logical and easy to understand graphical representation. You can create new Workflows and edit existing Workflows using the Graphical View.

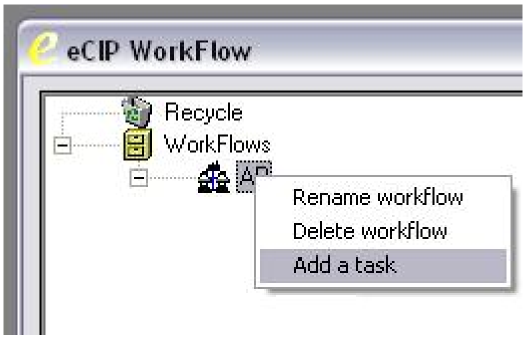
To enter Graphical View close all open windows and click View/Graphical. From here, you can press the + boxes to maximize any tree or the – boxes to minimize any tree.



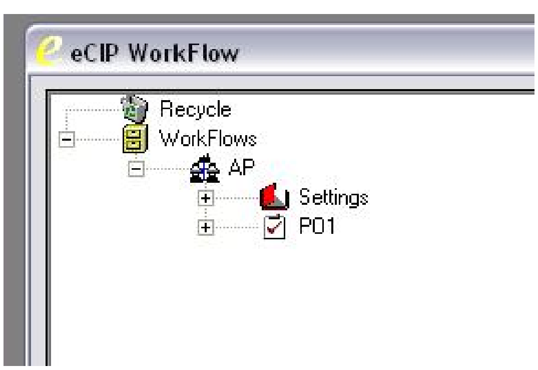
Setting up a WorkFlow

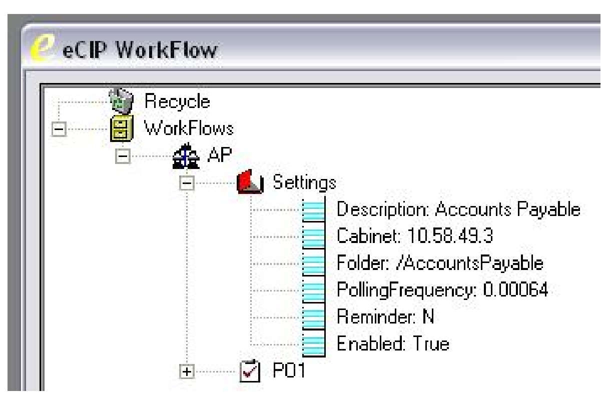
In this section we will be creating a WorkFlow called AP using Graphical View.

Step 1: To create a new WorkFlow right click on WorkFlows and click "Add a workflow". Enter in AP and press ok to apply the new WorkFlow.



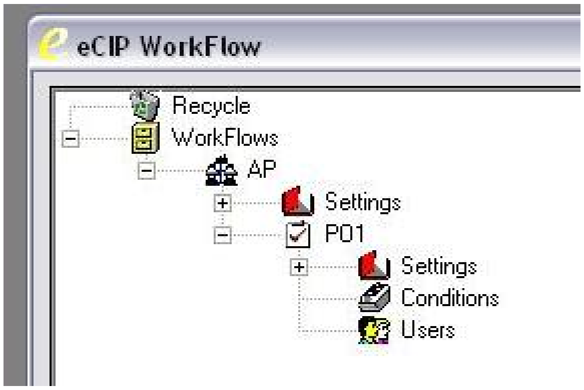
Step 2: To add the task PO1 to a WorkFlow AP, right click WorkFlow AP and click "Add a task". Enter in PO1 and press ok. Repeat to add addition tasks. (Such as PO2 and PO3)
Step 3: You will now see AP's settings and tasks. Expand AP's settings to reveal all the settings options.
Step 4: Right click Description and enter in Accounts Payable.
Step 5: Right click Cabinet. For Cabinet Name we will enter in the IP address of the eCabinet holding the documents we will be using for this WorkFlow.
Step 6: Right click Folder. Choose the name of the folder holding the documents. We are going to pick /AccountsPayable.
Step 7: Right click PollingFrequency. Select the Polling Frequency of the files. This will change the frequency new files are checked for in the eCabinet.
Step 8: Right click Reminder. Select a Reminder setting. The selected reminder option will choose when you are sent a reminder email for new files.
Step 9: Right click Enabled. Choose "True" to enable the WorkFlow AP.



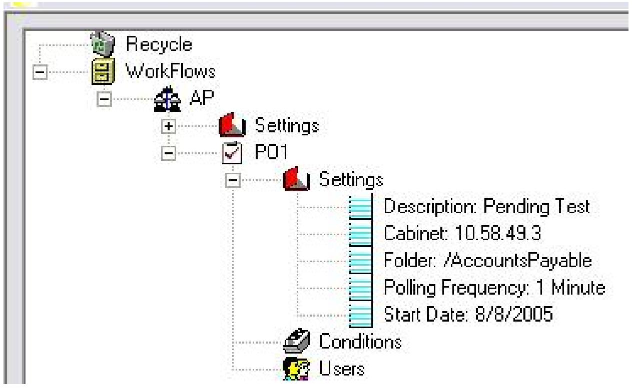


Task Settings

Expand the task PO1 by clicking the + next to the task name. Here you can edit task settings, add conditions, and add users.

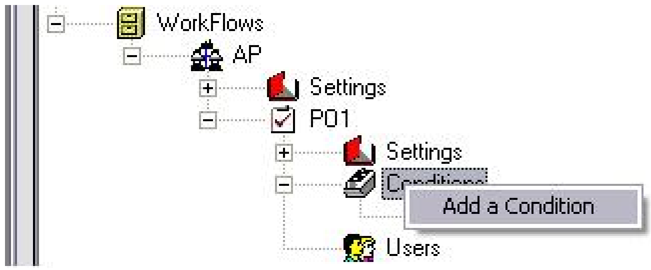


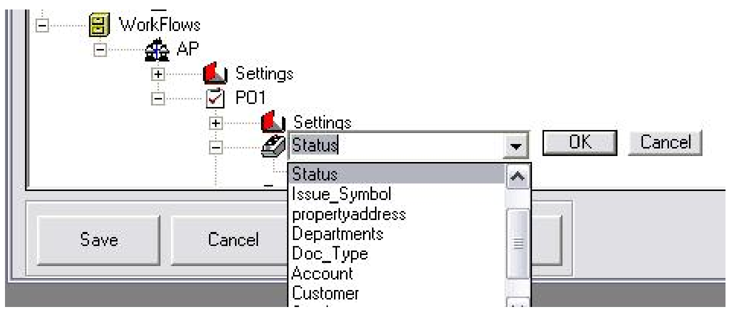
Step 1: Expand PO1s settings. You will now see PO1's settings.
Step 2: Right click Description and enter in Pending Test.
Step 3: Right click Cabinet. For Cabinet Name we will enter in the IP address of the eCabinet holding the documents we will be using for this task.
Step 4: Right click Folder. Choose the name of the folder holding the documents. We are going to pick /AccountsPayable.
Step 5: Right click PollingFrequency. Select the Polling Frequency of the files. This will change the frequency new files are checked for in the eCabinet.
Step 6: Right click Reminder. Select a Reminder setting. The selected reminder option will choose when you are sent a reminder email for new files.



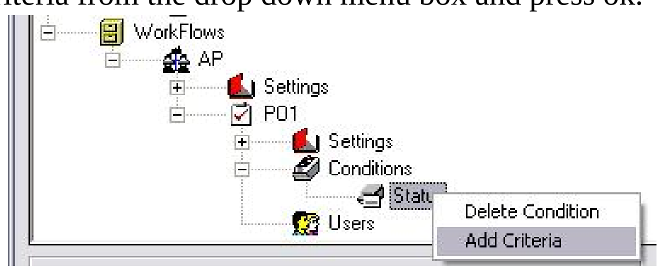
Adding Conditions to a Task

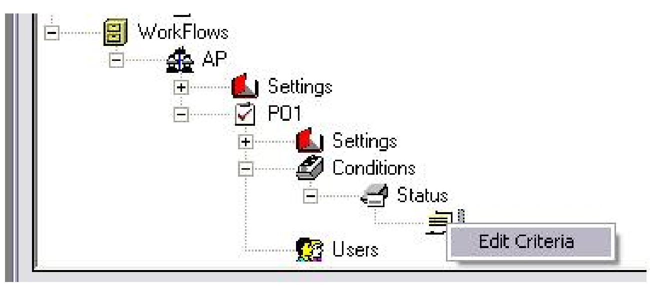
In this example we will be adding a condition to the WorkFlow AP.
Step 1: Right click Conditions and click “Add a Condition”.
Step 2: Name your Condition and press OK.

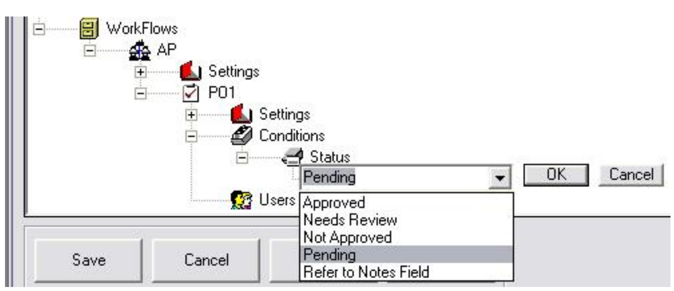




Step 3: To add criteria to a condition, right click a condition and click “Add Criteria”.
Step 4: Right click the paper icon and click “Edit Criteria”.
Step 5: Pick the criteria from the drop down menu box and press ok.

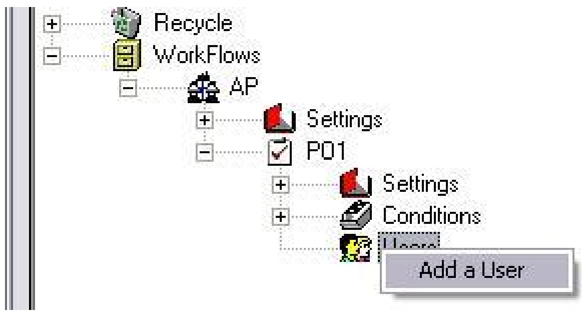


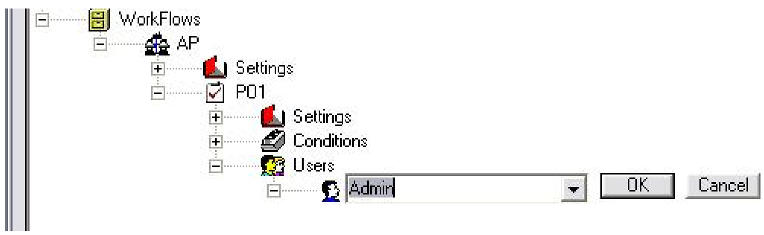




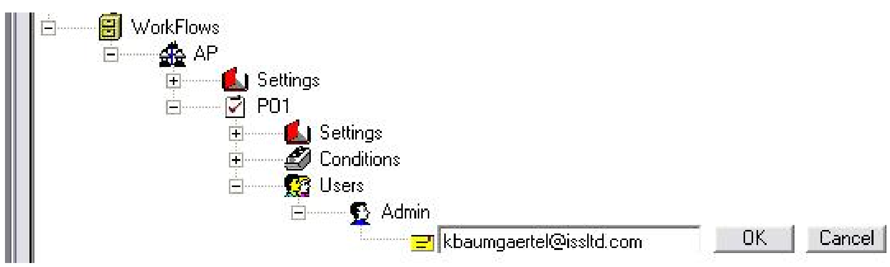
Adding Users to a Task

In this example we will add a user to the task PO1.
Step 1: To add a User to PO1 right click Users and click “Add a User”.
Step 2: A new user will be added called “New User”. Right click on “New User” and click rename. Choose the new name from the drop down box and press ok.





Step 3: Expand the user by click the + next to the user. Right click on “New Email” to edit the Users Email address. Enter in the Email address and press ok.



Creating additional WorkFlows, Tasks, Condition, and users

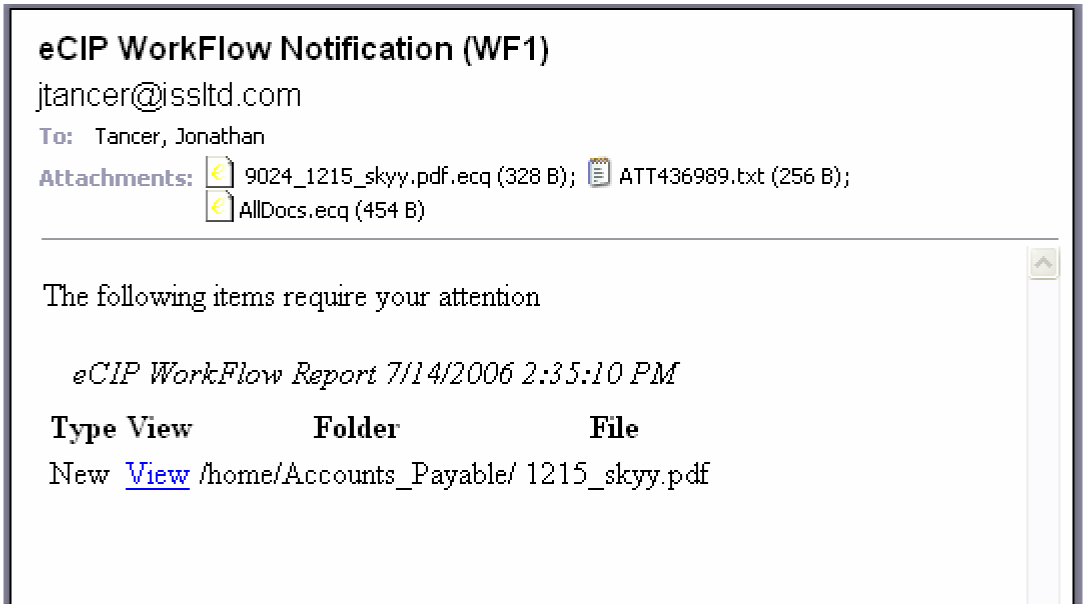
Follow all the same steps for adding additional WorkFlows, Tasks, Conditions and Users.

To save all changes press the save button at the bottom of the eCIP WorkFlow window.

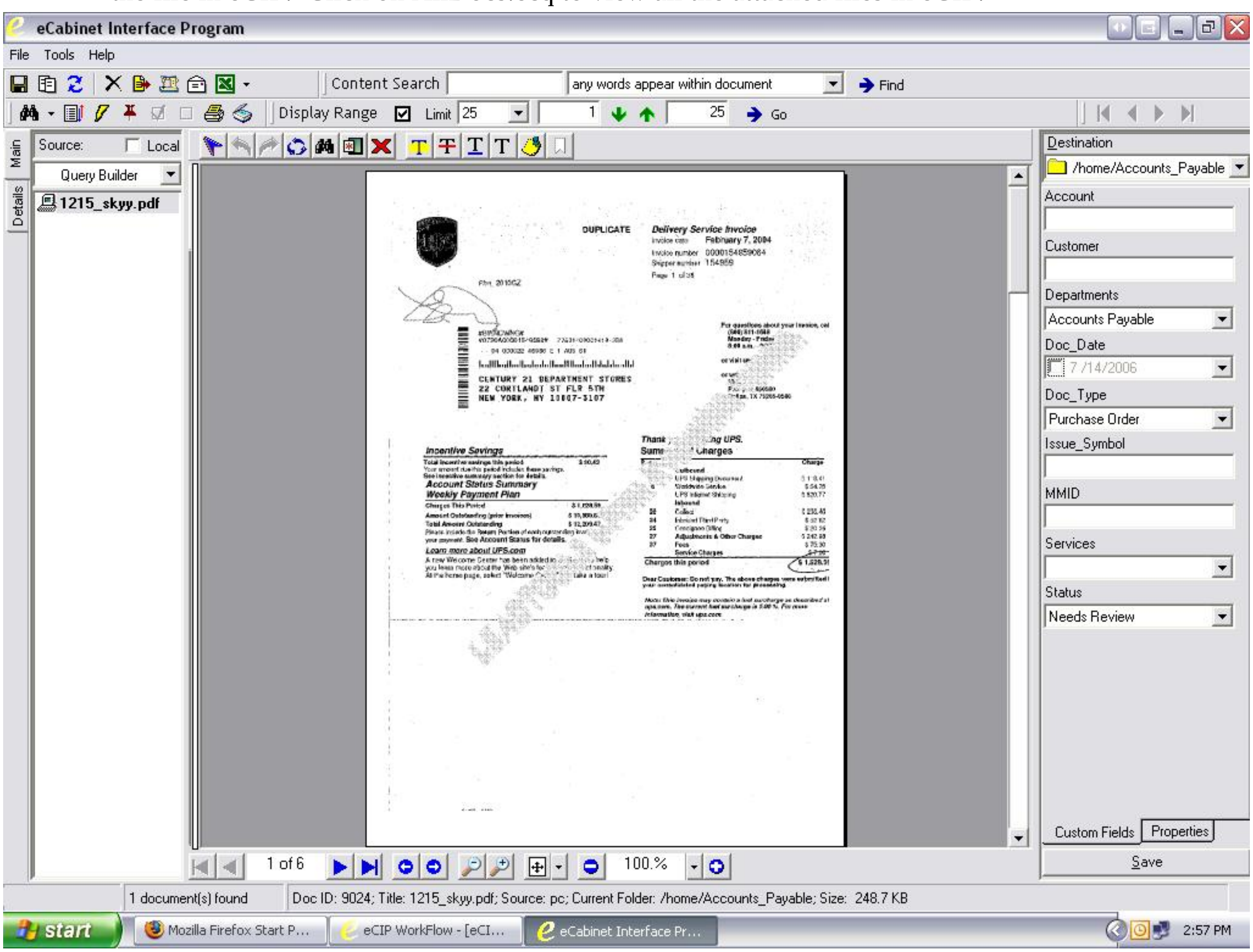
To export a tree, press the export button at the bottom of the eCIP WorkFlow window.
To import a tree, press the import button at the bottom of the eCIP WorkFlow window.

Viewing your WorkFlow email

After files are found or changed in the WorkFlow folder, you will receive an email containing links to the documents in the eCabinet.

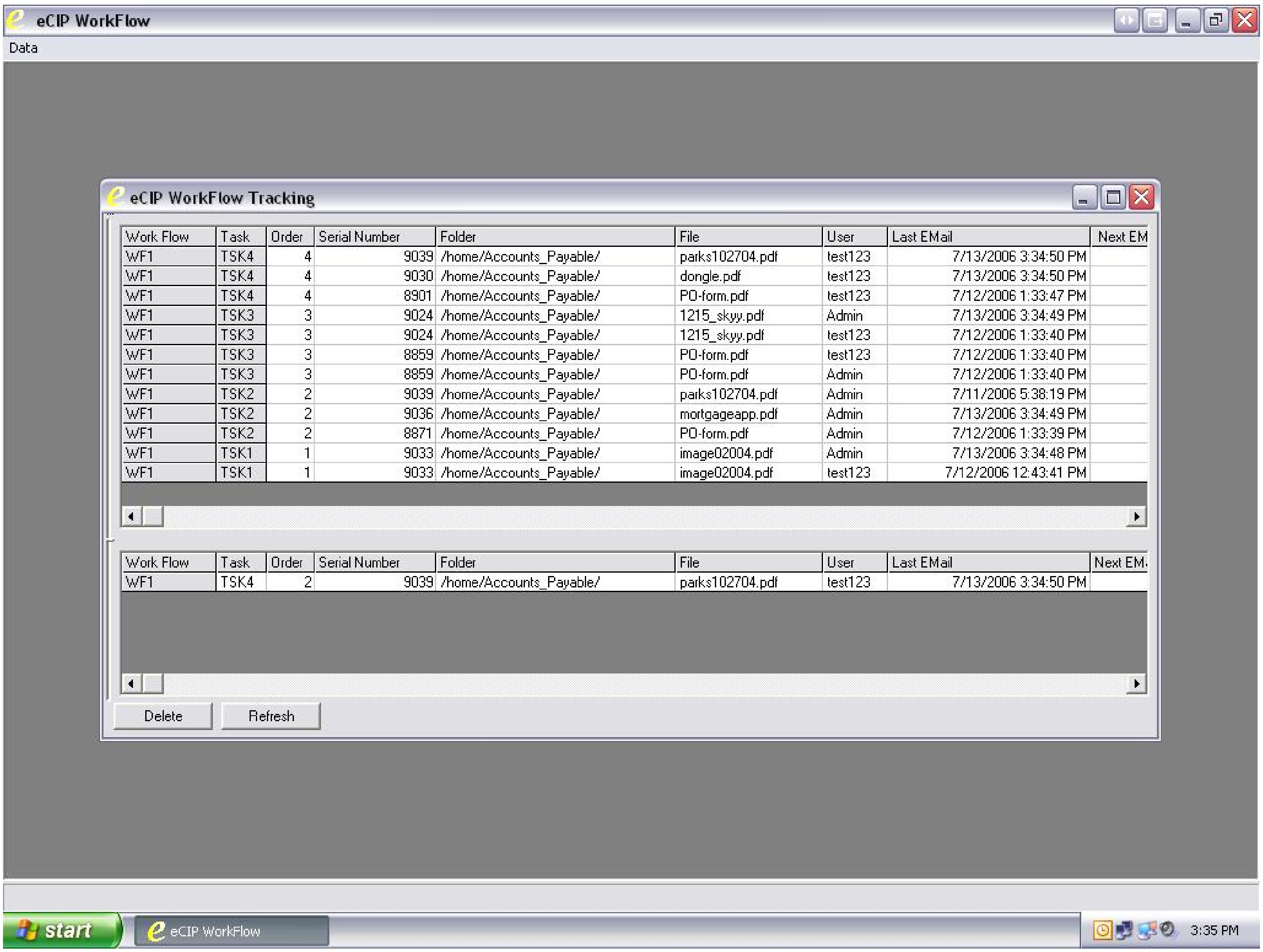


The email you receive will look like this. Double click any of the .ecq files to open up the file in eCIP. Click on AllDocs.ecq to view all the attached files in eCIP.



Tracking a WorkFlow

Once a WorkFlow is created, an administrator may optionally use eCIP WorkFlow’s tracking feature to debug or track current WorkFlows.



Work Flow	Task	Order	Serial Number	Folder	File	User	Last EMail	Next EM
WF1	TSK4	4	9039	/home/Accounts_Payable/	parks102704.pdf	test123	7/13/2006 3:34:50 PM	
WF1	TSK4	4	9030	/home/Accounts_Payable/	dongle.pdf	test123	7/13/2006 3:34:50 PM	
WF1	TSK4	4	8901	/home/Accounts_Payable/	PO-form.pdf	test123	7/12/2006 1:33:47 PM	
WF1	TSK3	3	9024	/home/Accounts_Payable/	1215_skyy.pdf	Admin	7/13/2006 3:34:49 PM	
WF1	TSK3	3	9024	/home/Accounts_Payable/	1215_skyy.pdf	test123	7/12/2006 1:33:40 PM	
WF1	TSK3	3	8859	/home/Accounts_Payable/	PO-form.pdf	test123	7/12/2006 1:33:40 PM	
WF1	TSK3	3	8859	/home/Accounts_Payable/	PO-form.pdf	Admin	7/12/2006 1:33:40 PM	
WF1	TSK2	2	9039	/home/Accounts_Payable/	parks102704.pdf	Admin	7/11/2006 5:38:19 PM	
WF1	TSK2	2	9036	/home/Accounts_Payable/	mortgageapp.pdf	Admin	7/13/2006 3:34:49 PM	
WF1	TSK2	2	8871	/home/Accounts_Payable/	PO-form.pdf	Admin	7/12/2006 1:33:39 PM	
WF1	TSK1	1	9033	/home/Accounts_Payable/	image02004.pdf	Admin	7/13/2006 3:34:48 PM	
WF1	TSK1	1	9033	/home/Accounts_Payable/	image02004.pdf	test123	7/12/2006 12:43:41 PM	

Work Flow	Task	Order	Serial Number	Folder	File	User	Last EMail	Next EM.
WF1	TSK4	2	9039	/home/Accounts_Payable/	parks102704.pdf	test123	7/13/2006 3:34:50 PM	