FEITH

Feith Workflow iQ Manager
Version 9.2
User Guide

Updated 8/4/2017

Feith Workflow iQ Manager
Version 9.2
User Guide

Feith Systems and Software, Inc.
425 Maryland Drive
Fort Washington, PA 19034
Tel (215) 646-8000
Fax (215) 540-5495
www.feith.com

Table of Contents

Introduction

Welcome

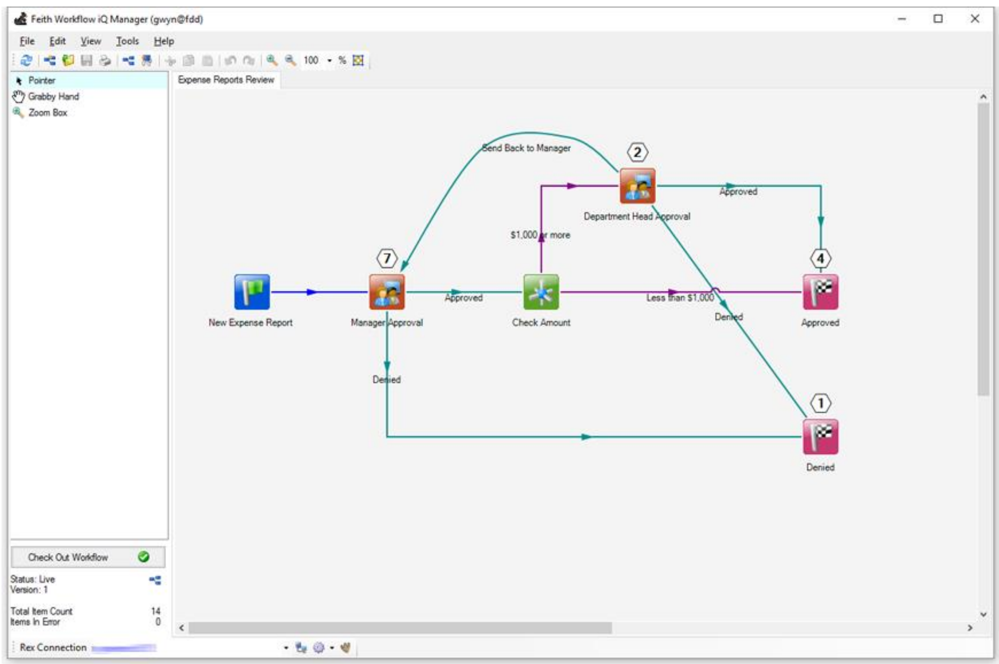
Feith Workflow iQ Manager is an administrative tool used to design, maintain, and monitor workflows.

What is a Workflow?

A **workflow** is a series of tasks and routes that moves a work item - an FDD document or folder - through a set of defined business rules until the work is completed.

- A **task** is a node where work is done, such as by a user, a program called by command line, or other work. See Add Tasks for more information.
- A **route** is a path that moves work from one task to another, defining how and why a work item arrives at a particular task. See Add Routes for more information.

The workflow map illustrates the design of the workflow. Tasks are represented by icons and routes are represented by lines. The workflow may also contain other graphical elements such as text, labels, pictures, or boxes, which may be used for supplemental labeling or as visual aids. See Design Workflows for more information.



What Do Workflow Users Do?

When a step in the business process requires user action, a workflow user logs into the Feith client application, FDD or WebFDD, and views their **Work To Do**. The user then processes the items in their work queue as needed.

The work performed by the user is specific to your FDD implementation. For example, the user may enter additional information for a document, verify the presence and accuracy of a document and its information before it moves forward, or review a document for approval.

Once the workflow user finishes processing the work item and indicates that it is done, the work item is routed to the next task in the workflow.

See the **FDD User Guide** and the **WebFDD User Guide** for more information on processing work items in a workflow task.

Monitor Workflows

Once a workflow is designed, published, and in production, you can monitor it through Workflow iQ Manager. You can view how much work is in each task, the status of each work item, the history of where the work item has been, ad hoc route a work item to another task, clear errors, remove holds, withdraw work items from the workflow, and so on. See Monitor Workflows for more information.

Maintain Workflows

You may update the workflow design as needed to adapt it to the changing requirements of your business process. If a workflow is no longer needed, you may take it out of production while keeping the map structure in case you need it later. See Save, Publish, and Maintain Workflows for more information.

What's New?

The following are features which have been added or improved in Workflow iQ Manager:

- **Interface Revamp:** Workflow iQ Manager has been largely rewritten and with that comes numerous interface changes, including a toolbar with tool sets you can collapse or expand, a route will visually "jump over" an intersecting route, workflow tabs are in the upper left and can be rearranged using click-and-drag, the Rex tools are on a new, separate Rex Toolbar that can be moved to the desired location, essentially all dialogs can be re-sized and remember the new size, and so on. It is recommended to familiarize yourself with the new interface and refer to this updated help file as needed.
- **Custom SQL Rule Tokens:** Write custom SQL in a rule token that you can put in a notification, work-o-gram, or hub task program. For example, rule tokens can be used to send a notification to a custom list of recipients or include information in the notification's body that is not in the file cabinet. See Rule Tokens for more information.
- **Max Concurrent Processes for a Hub Task**: Optionally specify the **Maximum Number of Concurrent External Processes** allowed in a hub task. For an important hub task you would have a higher number; for an unimportant hub task you would have a lower number. For example, if you have an unimportant hub task with a lot of documents, you could lower the hub task down to **2** concurrent processes. That way, the task is only working up to two documents at a time and doesn't take Rex's attention away from more important work. See Configure Program for more information.
- **Streamlined Import that Remembers Mappings:** The import process has been streamlined, grouping like objects on a single screen. For example, all the notifications in the workflow are presented on one screen where you can review them all at once and choose to map, replace, or create as desired. Additionally, the mappings you made when you imported previous workflows will be remembered and suggested the next time you import a workflow. See Export and Import for more information.
- **Double-Click Work Item Count to View Work Info:** Double-click the work item count above a task to view that task's **Work Info**. See View Work Info for more information.
- **View and Modify Some Things Without Checking Out Workflow:** Notifications, Finishing Touches, and Integration Links can be viewed and modified without checking out the workflow. Just go into the task and open them to take a look or make a change. Additionally, you can view (not modify) wait-for rules in a wait-for task. See Notify, Finishing Touches, Integration Links, and Wait-For Task for more information.
- **Move Route with Click-and-Drag:** Move a route by selecting it and dragging the start point or end point to change the route's origin or destination task. See Add Routes for more information.
- **Mail Data, Copy Link, View Item, and Work from Work Info:** From Work Info, email a document's metadata to somebody, copy the document's WebFDD link to the clipboard to use somewhere, or view/work a document in WebFDD. See View Work Info for more information.
- **Export and Import Calendars:** Export and import calendars from one system to another (e.g. from a test system to a production system). See Calendars for more information.
- **Wormholes:** If your routes are criss-crossing, getting too long, or otherwise cluttering up your map, try tidying it up with wormholes. See Wormhole for more information.

Frequently Asked Questions (FAQ)

I cannot find the workflow I need to open?

> Make sure you have permission to the workflow. To open a workflow you must be in the workflow's **Administration Group**, a **Super Administrator**, or be **Assigned** in the workflow's supplementary permissions list. See Workflow Permissions for more information.

File>Open no longer lets me open a workflow .fwf file from my local computer?

> As of version 8, Workflow iQ Manager stores workflows in the database instead of saving them to the local machine. In order to open workflow .fwf. files saved by previous versions of Workflow iQ Manager, select **Tools>Advanced Options>Restore Backup File**. See Save and Restore Backup Files for more information.

I do not see any of the task or route tools in the administrator bar that let me modify the workflow?

> As of version 8, workflow locking was added to Workflow iQ Manager. This prevents users from inadvertently overwriting each other's changes. What you see is the workflow in "read-only" mode, which is useful for monitoring. If you need to modify the workflow design, you need to **Check Out** the workflow. See Modify Workflow for more information.

I cannot check out a workflow because Workflow iQ Manager says someone else has it checked out?

> Only one designer can have a workflow checked out for modifying, in order to avoid inadvertently overwriting of each other's changes. It is recommended that you contact the person who already has the workflow checked out. If necessary, you can **Override the Check Out** and break their lock on the workflow. See Override Check Out for more information.

I cannot find the user I want to assign?

> A user must be a Workflow type user in order to do things in Workflow iQ, such as be assigned to a user task. The user type is set in Feith Control Panel.

Rex is not running more hub task programs even though the Maximum Concurrent Processes setting on the hub task allows more?

> Rex has a global limit of concurrent external processes, which applies to all hub tasks, set in its initialization file. See Rex Manual for more information.

How do I put my own icon on a task?

> Right-click on the task and select **Change Picture**. See Add Tasks for more information.

Task-Customized and Personal notifications seem to be gone so how do I make a notification that can only be assigned in one workflow?

> When creating a notification, check on the **Limit to Workflow** option. The notification will only be available to assign in the one specific workflow. See Create and Maintain Notifications for more information.

The notification's Limit to Workflow option is disabled?

> The **Limit to Workflow** option is only available when creating a new notification from inside a task (it is not available in **Tools>Notification Administrator**). If you turn **Limit to Workflow** off for an existing notification, it cannot be turned back on.

There's a Deadline Route or Deadline Task in the workflow but the work items are not moving even though the deadline has passed?

> There are a couple reasons this may happen:
>
> - Rex has not checked deadlines yet. You may force Rex to check deadlines by clicking the down arrow on the Rex action button  in the Rex toolbar and selecting **Check Deadlines**. See Monitor Rex for more information.
> - A Deadline Route's deadline is calculated when the work item arrives at the task, so if the work item was already in the task when the deadline was added then the deadline will not be calculated. To force the deadline to be calculated, you will have to **Ad Hoc Route** the work item away from the task then route it back.

A Deadline Task's deadline is calculated when the work item arrives in the workflow at the Start Task, so if the work item was already in the workflow when the deadline was added then the deadline will not be calculated. To force the deadline to be calculated, you will have to **Ad Hoc Route** the work item to the start task.

See Ad Hoc Route for more information.

A route is not visually "jumping over" or "going under" intersecting routes?

Visually "jumping over" or "going under" intersecting routes is not supported for a **Bezier Curve** style route. See Add Routes for more information.

I want to change the number of characters required in workflow comments?

Writing down what you did to the workflow in comments is very important so that others and even yourself can know what changed in the workflow and why. The workflow is controlling your business process and taking a few seconds to record what you did can save time in the future.

Sometimes a workflow designer's change may inadvertently conflict with another designer's change, or troubleshooting a bug may lead you back to the workflow's version history reading comments from the time that symptoms first appeared.

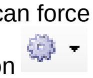
If you want to increase or decrease the number of characters required in the comments, contact Feith Support for instructions on how to do so.

Publish Workflow, Import Workflow, Delete Workflow, and Purge Workflow are disabled?

You must be a **Feith Admin** user (on Oracle) or a **Database Admin** user (on MS SQL Server) in order to perform these operations. See Workflow Permissions for more information.

Why is my Rex Connection in the Rex toolbar red?

The **Rex Connection** is **red** when Rex is not working the workflow. This may be because:

- The workflow was just published and Rex does not know about the workflow yet in order to process it. Rex will find the workflow and begin processing on its own, or you can force Rex to take over the workflow by clicking the down arrow on the Rex action button  in the Rex toolbar and selecting **Take Over Workflow Processing**.
- The selected Rex is intentionally not assigned to work the workflow. This may occur if you have more than one Rex running and different Rexes work different workflows for purposes of load balancing.

I cannot see the workflow in the client (FDD or WebFDD) to add a document or folder manually to the workflow?

In addition to having the **Add To Workflow** task permission, you must have permission on a workflow's **Start Task** in order to add documents or folders to the workflow manually from the client. See Assign Users to Start Task for more information.

Why can't I withdraw a work item from the entire workflow?

One of the copies of the work item is in a state which prohibits withdrawal (e.g. **Locked**). Work items can only be withdrawn if they have a status of **Available**, **Complete**, **Error**, or **Subflow**.

Note: Withdrawing multiple work items at once from the entire workflow is not supported.

If I withdraw a work item from a subflow task, is it withdrawing from all tasks in the subflow workflow?

Yes. Note that if an instance of the work item in the subflow cannot be withdrawn (e.g. is currently **Locked**), that the work item will be marked to be withdrawn but will not actually be withdrawn until it can be withdrawn (e.g. is no longer **Locked**).

Can I withdraw a work item from an entire workflow without withdrawing it from the subflow(s)?

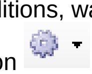
No. Since selecting **Withdraw>From Entire Workflow** will result in the work item being removed all tasks, including subflow tasks which point to subflows, you will have to withdraw the work item from each individual task in the "parent" workflow (excluding the subflow tasks where you want the work item to stay).

Tips and Tricks

Take advantage of various tips and tricks in Workflow iQ Manager to better design, maintain, and monitor workflows.

- When designing a workflow and adding tasks, routes, and graphical elements, hit **CTRL+1** to quickly switch back to the **Pointer** tool to move and configure objects.
- With the **Pointer** tool selected, temporarily switch to the **Grabby Hand** tool by holding down **SHIFT** to scroll around the map using click-and-drag.
- Use **CTRL+TAB** to go to the next open workflow tab, moving left to right. Use **SHIFT+CTRL+TAB** to go to the previous open workflow, moving right to left.
- Reorder the workflow tabs using click-and-drag.
- Close a workflow with a "middle-click" on its tab using the mouse wheel.
- If you are in a field that inserts a tab when you press the **TAB** key (e.g. notification **Body**), you can use **CTRL+TAB** to navigate to the next control in the dialog (or **SHIFT+CTRL+TAB** to go to the previous control).
- See Appendix C: Keyboard Shortcuts for more information on keyboard shortcuts available in Workflow iQ Manager.
- As soon as the **Task Administrator** opens, you can take advantage of one of the following keyboard shortcuts:
    - Hit the **TAB** key once to quickly move to the **Name** field. This may be helpful when first adding tasks, especially if you are adding many tasks.
    - Use the up and down arrow keys to navigate to the desired tab.
- In lists such as **Users** in a user task, tasks in **Edit>Find Task**, workflows in **File>Open**, or other lists, hit the key of the first letter of the name to jump to that part of the list. Hit the letter key multiple times to cycle through all items that start with that letter. Also, use the up and down arrow keys in the list to select the desired item.
- Notifications, Finishing Touches, and Integration Links can be viewed and modified without checking out the workflow. Just go into the task and open them to take a look or make a change. For example:
    - When the workflow is checked in, double-click the notification in the **Notify** tab to open the notification assignment.
    - When the workflow is checked in, double-click a wait-for rule to view (not modify) the condition.
    - You can also use the buttons to modify finishing touches and integration links while the workflow is checked in.
- Clone a task with its input and output routes using **Clone** under the right-click menu (instead of **Copy**, which does not copy the routes).
- Copy or move a route to a new origin or destination task. See Add Routes for more information.
- If your routes are criss-crossing, getting too long, or otherwise cluttering up your map, try tidying it up with wormholes.
- If a large number of work items could pile up in an end task, consider turning on **Withdraw Documents Upon Completion** so the work items don't pile up in the end task. If a large number of work items have already piled up in your end task, you can use the **Withdraw All** option to withdraw all work items from the end task. See End Task and Withdraw for more information.
- If you do not want to configure a complex conditional route right away, enter a **Description** for the conditional route as to what it will be and the route will remain dashed and incomplete until you come back later to finish its configuration. See Conditional Route for more information.

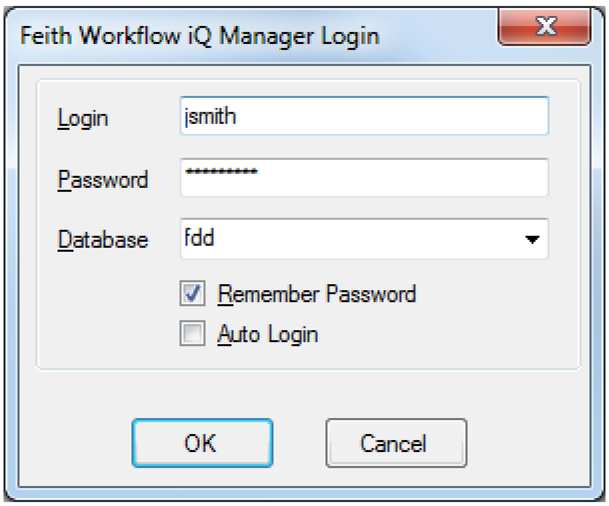
- Use an **Other** conditional route to catch work items that do not meet any of the other conditional routes.
- When creating or modifying a notification, work-o-gram, or hub task program, use **Rule Tokens** to write custom SQL (Structured Query Language) to retrieve values you want to use in the email or command line. For example, you may write SQL to retrieve a custom list of email addresses, stored in a location other than the file cabinet, to use as email recipients.
- When creating or modifying a notification in the **HTML** format, click **Show Source** to add advanced HTML features, such as pictures, links, etc.
- When creating or modifying a long notification, drag the gray split bar up to see more of the body.
- To see everywhere a notification is assigned, go to **Tools>Notification Administrator**, select a notification, and click **Current Assignments** .
- If you want a notification to only appear for a specific workflow, when creating the notification select the **Limit to Workflow** option.
- Bookmark your favorite workflows or bookmark a group of workflows that go together, then select the bookmark in **File>Workflow Bookmarks** to open all its workflows at once.
- If you want other designers to see the workflow version you are working on changing, **Check In a Non-Published Version** to the workflow's version history for others to see. See Check In Version for more information.
- If you do not want Workflow iQ Manager to warn you about open workflows on exit, turn this warning off under **Tools>Advanced Options>Warn On Exit**.
- Fit the workflow in the Workflow iQ Manager screen by clicking **Zoom to Fit** in the standard toolbar.
- Change a task icon to your own custom icon by right-clicking the task and selecting **Change Picture**. See Add Tasks for more information.
- If you want to show some task and route labels but hide others, in the right-click menu use **Hide Text** or **Show Text**. See Add Tasks and Add Routes for more information.
- If you just created a new workflow and the **Rex Connection** in the Rex toolbar is **red**, Rex does not yet know about the workflow in order to process it. Rex will find the workflow and begin processing on its own, or you can force Rex to take over the workflow by clicking the down arrow on the Rex action button in the Rex toolbar and selecting **Take Over Workflow Processing**.
- Use **Edit>Find Task** to find any task in the workflow by name. See Add Tasks for more information.
- If you want to grant a user access to open a workflow in Workflow iQ Manager but not put them in the workflow's administration group, add them to the **Workflow Permissions** list.
- Open **Work Info** by double-clicking the work item count above a task (instead of selecting **Work Info** under the right-click menu).
- In **Work Info**, if a value does not display in its entirety, click the **Best Fit Displayed Data** button in the upper left of the grid. Alternatively, you can just mouse over the value and it will display in a tooltip in its entirety.
- Use the **Status Locator** to find any work item in any workflow that is in **Error** or **On Hold**.
- Double-click a row to open the workflow and go to the task, from the Status Locator, Locations dialog, and notification's Current Assignments.
- If you are waiting for work items to leave a wait-for task, check the **Wait-For Status** to see whether the work items meet the specified rule(s).
- If you are monitoring multiple workflows at once, instead of manually switching between the workflows have them automatically switch using **View>Auto-Cycle**. See The Workflow Tabs for more information.

- Use the **Summarize** feature in **Information Tasks** to show the count of work items across multiple tasks (or even multiple workflows). For example, you could configure an information task to show a sum of all work items in all user tasks in a given workflow.
- Use a **Box** to visually group tasks in the workflow map.
- If you have FDD Client installed, open a work item from Workflow iQ Manager's **Work Info** in FDD Client using **View Item** or **Work** or leap on a work item using **Leap**. See View Work Info for more information.
- Find all locations where a work item exists in any workflow using **Locate** in **Work Info**.
- If you have a route that is long or positioned in such a way that you are unsure of its origin and destination tasks, right-click the route and select **Route Information**. See Add Routes for more information.
- If you are unsure why a work item has gone into error in your workflow process, view the Rex log to get more information on when and why Rex encountered the error. See Monitor Rex for more information.
- Mouse over the text **Rex Connection** in the Rex toolbar to see how much time there is until the next time Rex is scheduled to process workflows.
- If you do not want the Rex Monitor to launch every time you prompt Rex using the Rex action button  in the Rex toolbar, turn off **Show Monitor on Requests** under **Tools>Rules Engine**.
- You can prompt Rex to immediately process workflows, polled insert conditions, wait-for tasks, rendezvous tasks, and deadline routes or tasks using the Rex action button  in the Rex toolbar. Rex will perform these checks on its own at configured intervals and you may change the intervals for Rex's checks in order to tune Rex according to the needs of your system. See Monitor Rex and **Rex Manual** for more information.
- If you do not want the Rex Monitor to open every time you prompt Rex to do work, turn it off under **Tools>Rules Engine>Show Monitor on Requests**.
- When importing and mapping various objects, sometimes the **Compare Objects** option is available and can provide you with more information on what your mapping to and from (e.g. a file cabinet field's **Description** and **Type**).
- When importing and replacing mapped objects (e.g. notifications, finishing touches, rule tokens, etc), right-click on the **Replace** checkbox and choose **Check All** or **Uncheck All** to change the selection for multiple objects quickly.
- If you want to reuse a workflow design, select **File>Clone Workflow** (see Clone Workflow for more information). If you want to reuse a workflow design on a different base file cabinet, export and import the workflow design, creating a new workflow built on the desired base file cabinet (see Export and Import for more information).
- If you are disconnected from the FDD database while in Workflow iQ Manager, attempt to repair the connection using **File>Repair Connection** or save your work using **Tools>Advanced Options>Save Backup File**. See Disconnected for more information.

Login

To login to Workflow iQ Manager:

1. In your start menu programs list select **Workflow iQ Manager** under **Feith Systems**. The **Feith Workflow iQ Manager Login** dialog opens.
2. Enter your **Login** name.
3. Enter your **Password**.
4. Enter your **Database**.
5. Optionally select the following:
    - **Remember Password:** Turn this option on for Workflow iQ Manager to remember your password and fill it in for you.
    - **Auto Login:** Turn this option on to remember all your login information and automatically log into Workflow iQ Manager next time, skipping the login dialog.



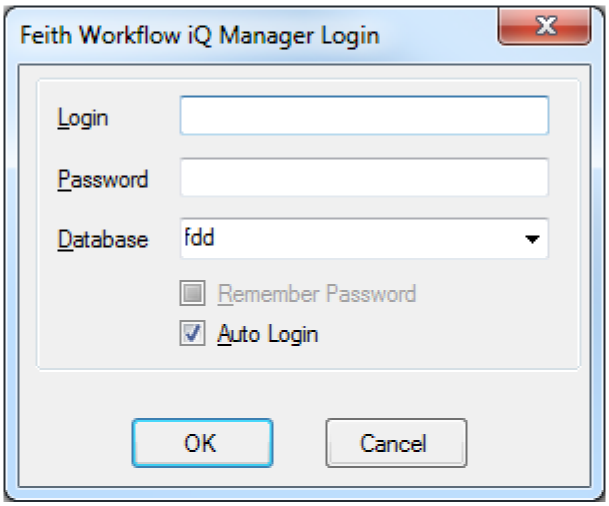
6. Click **OK**. You are logged into Workflow iQ Manager.

   If you have chosen to have Workflow iQ Manager **Remember Open Workflows** (under the **File** menu), workflows left open the last time you exited Workflow iQ Manager are opened.

Single Sign-On

To login to Workflow iQ Manager if your FDD system is configured for Single Sign-On:

1. In your start menu programs list select **Workflow iQ Manager** under **Feith Systems**. The **Feith Workflow iQ Manager Login** dialog opens.
2. Leave the **Login** and **Password** fields empty.
3. Enter your **Database**.
4. Optionally, if you want to skip the login dialog in future, turn on the **Auto Login** option and Workflow iQ Manager will login for you automatically, skipping the login dialog.



5. Click **OK**. You are Single Signed-On to Workflow iQ Manager.

   If you have chosen to have Workflow iQ Manager **Remember Open Workflows** (under the **File** menu), workflows left open the last time you exited Workflow iQ Manager are opened.

Disconnected

When Workflow iQ Manager loses connectivity to the FDD database, it goes into the "disconnected" state. Workflow iQ Manager provides options to attempt to repair the connection and save your work.

When Happens When I am Disconnected?

When Workflow iQ Manager loses connectivity to the FDD database, it goes into the "disconnected" state. In the disconnected state, the title bar says *****DISCONNECTED***** and all operations requiring database connectivity are disabled. It may be that there is a network issue or the FDD database is down.

What Should I Do When I am Disconnected?

Wait and see if the connection will be re-established without closing Workflow iQ Manager. Depending on the nature of the issue, it may take more or less time before the FDD database is available again for Workflow iQ Manager to connect.

- Attempt to repair Workflow iQ Manager's connection to the FDD database.
    - When the **Auto-Repair Connection** option is on, Workflow iQ Manager will automatically attempt to repair the connection to the database every five minutes. You may toggle this option in **Tools>Advanced Options>Auto-Repair Connection**.
    - Attempt to repair the connection manually by selecting **File>Repair Connection**. **Repair Connection** is a better alternative to **File>Reconnect** because **Repair Connection** does not close your workflows.

      Note: This option only appears when in the disconnected state.

Save your work if it seems that the disconnection issue will last for a while, you need or want to close Workflow iQ Manager, or just to be safe.

- Save your changes to any checked out workflows.

  Save a backup .fwf file of the workflow map with your changes using **Tools>Advanced Options>Save Backup File**. See Save and Restore Backup Files for more information.

What Should I Do When the Connection is Restored?

If you are still in Workflow iQ Manager when the FDD database connection is restored, you can move on normally. To be safe, you may want to immediately save any workflows you have checked out with changes. See Save Draft for more information.

If you have a backup .fwf file that you saved when disconnected, restore the workflow map from the file using **Tools>Advanced Options>Restore Backup File**. See Save and Restore Backup Files for more information.

Workflow Manager Interface

The Menus

Workflow iQ Manager has the following menus: **File**, **Edit**, **View**, **Tools**, and **Help**.

File Menu

MENU OPTION	ACTION
New (CTRL+N)	Create a new workflow.
Open (CTRL+O)	Open a workflow.
Close	Close the workflow. **Tip:** Close a workflow with a "middle-click" on its tab using the mouse wheel.
Close All	Close all open workflows.
Close Others	Close all open workflows except the current workflow.
Save Draft (CTRL+S)	Save a personal draft of the workflow with the changes you have made without putting the changes into production.
Publish Workflow	Publish the workflow and put it into production.
Clone Workflow	Clone the workflow, creating a new workflow with the same design as the original.
Delete Workflow	Delete the workflow. The workflow is no longer in production, but the workflow map and version history are saved. A deleted workflow can be re-published if desired.
Version History	View the workflow's version history.
Check Out	Check out the workflow to modify the design.
Check in Version	Check in a non-published version of the workflow into the workflow's version history.
Undo Check Out	Undo the check out of a workflow, which will lose all changes made since the workflow was last checked out.
Print (CTRL+P)	Print the workflow map.
Print Preview	View a preview of a printed workflow map before printing it.
Page Setup	Adjust the page settings for printing, such as the orientation, layout, margins, etc.
Properties	View or modify the workflow's properties, including its name, description, base file cabinet, and administration group.

Permissions	View or modify supplemental permissions to the workflow for users or groups that are not in the administration group or are not a super administrator user.
Export	Export the workflow design.
Import	Import an exported workflow design.
Report	View a report of the workflow design.
Remember Open Workflows	Turn this option on to have Workflow iQ Manager remember which workflows you had open when you last exited Workflow iQ Manager. The next time you open Workflow iQ Manager those workflows are opened automatically.
Recent Workflows	Lists the last six opened workflows.
Reconnect	Close the current database connection and connect again. This is useful for switching your user login or database, or for re-establishing a connection to the database after being disconnected.
Repair Connection	Attempt to repair the connection to the database. This option only appears when Workflow iQ Manager has become disconnected from the database.
Exit	Exit Workflow iQ Manager and close the database connection. If a workflow map is open, it is closed and you are prompted to save any changes.

Edit Menu

MENU OPTION	ACTION
Undo (CTRL+Z)	Undo the previous action. There are four levels of undo per workflow.
Redo (CTRL+Y)	Redo the previous undone action.
Cut (CTRL+X)	Cut a task, graphical element, or text and move it to the clipboard. If you want to move a route, see Add Routes for more information.
Copy (CTRL+C)	Copy a task, graphical element, or text to the clipboard. If you want to copy a task with its routes, use **Clone** instead. If you want to copy a route, see Add Routes for more information.
Paste (CTRL+V)	Paste the contents of the clipboard, such as a task, graphical element, or text.
Clone (CTRL+L)	Clone a task with its input and output routes, graphical element, or text. If you want to copy a route, see Add Routes for more information.
Delete (DELETE key)	Delete the selected object, such as a task, route, or graphical element.

Select All (CTRL+A)	Select all objects in the workflow map. This is useful for moving the entire workflow diagram around in the map or changing the task and route label display to show or hide labels for all tasks and routes in the workflow at once. See Add Tasks and Add Routes for more information on task and route labels.
Select All Tasks	Select all tasks in the workflow map. This is useful for changing the task label display to show or hide labels for all tasks in a workflow at once. See Add Tasks for more information on task labels.
Select All Routes	Select all routes in the workflow map. This is useful for changing the route label display to show or hide labels for all routes in a workflow at once. See Add Routes for more information on route labels.
Find Task	Find a task in the workflow by selecting it from the task list. You are scrolled to the task in the workflow map. **Tip:** In the task list hit the key of the first letter of the task name to jump to that part of the task list. Hit the letter key multiple times to cycle through all tasks that start with that letter. Also, use the up and down arrow keys in the task list to select the desired task.

View Menu

MENU OPTION	ACTION
Standard Toolbar	Toggle the display of the standard toolbar. See The Toolbars for more information.
Administrator Toolbar	Toggle the display of the administrator toolbar. See The Toolbars for more information.
Rex Toolbar	Toggle the display of the Rex toolbar. See The Toolbars for more information.
Dashboard iQ	Display a dashboard made in Feith Dashboard iQ below your workflow. A dashboard may be configured to display workflow processing and other relevant information. See The Dashboard iQ Pane for more information.
Theme	Display workflows in the desired theme.
Grid Density	Display the grid in a **Dense** or **Sparse** pattern. The grid displays when the workflow is checked out. See The Workflow Map for more information.
Background Color	Display workflows with the desired map background color. See The Workflow Map for more information.
Background Image	Display workflows with the desired map background image. See The Workflow Map for more information.
Default Route Style	Choose the default route style from the options **Polyline**, **Polyline with Destination Arrow**, and **Bezier Curve**. See Add Routes for more information.

Default Font	Choose the default font, size, style, and color for text in the workflow map, such as task labels, route labels, and text in graphical elements.
Animation	Toggle animation of routes that indicates the progress of work items through the workflow.
Auto-Cycle	Turn this option on to have Workflow iQ Manager automatically switch the display between open workflows at a specified interval. See The Workflow Tabs for more information.
Next Workflow (CTRL+TAB)	Go to the next open workflow, moving left to right.
Zoom Percentage	Select or enter the desired zoom percentage.
Zoom to Fit	Zoom to fit the entire workflow map in the Workflow iQ Manager screen.
Task Labels	Toggle the display of all task labels.
Route Labels	Toggle the display of all route labels.
Work Item Counts	Toggle the display of work item counts above tasks.
Work Item Count Font	Choose the font, size, style, and color of the work item counts above tasks.

Tools Menu

MENU OPTION	ACTION
Status Locator	Open the status locator to locate work items in error or on hold across all workflows to which you have access. See Status Locator for more information.
Notification Administrator	Create and maintain notifications. See Notify for more information.
Integration Link Administrator	Create and maintain integration links. See Assign Integration Link for more information.
Finishing Touch Administrator	Create and maintain finishing touches. See Finishing Touches for more information.
Rule Token Administrator	Create and maintain rule tokens. See Rule Tokens for more information.
Calendar Editor	Create and maintain calendars. See Calendars for more information.
Vacation Planner	Create and maintain substitute assignments for users on vacation. See Vacation Planner for more information.

Advanced Options	Choose from the following advanced options: • **Save Backup File:** Save the workflow in a .fwf file on your local computer. See Save and Restore Backup Files for more information. • **Restore Backup File:** Restore the workflow from a .fwf file on your local computer. This may need to be done to restore changes that were lost when Workflow iQ Manager was disconnected from the database. See Save and Restore Backup Files for more information. • **Auto-Repair Connection:** Turn this option on to have Workflow iQ Manager attempt to repair a lost database connection every five minutes. See Disconnected for more information. • **Warn On Exit:** Turn this option on to have Workflow iQ Manager prompt you with a warning when you try to exit with workflows still open. Turn this option off to not get any warning and Workflow iQ Manager will just close the workflows and exit.
Feith Control Panel	Launch the desired Feith Control Panel module. **Note:** This option is only available if Feith Control Panel is installed on your computer.
Forms iQ Designer	Launch Feith Forms iQ Designer. **Note:** This option is only available if Forms iQ Designer is installed on your computer.
Rules Engine	Choose from the following Rules Engine (Rex) options: • **Allow Connections:** Turn this option on to allow Rex connections to Workflow iQ Manager. • **Rex Connection:** Lists available Rex engines with the current Rex selected. Select a different Rex as desired. • **Refresh Connection:** Refresh the list of available Rex engines. Refreshing the connection also switches to the Rex working the workflow (e.g. if you have more than one Rex running and different Rexes work different workflows for purposes of load balancing). • **Rex Monitor:** View the Rex Monitor, which displays what Rex is doing and when. See Monitor Rex for more information. • **Show Monitor on Requests:** Turn this option on to automatically launch the Rex Monitor when you prompt Rex to process work items using the Rex action button in the Rex toolbar. See Monitor Rex for more information.

Help Menu

MENU OPTION	ACTION
Feith Workflow iQ Manager Help (F1)	View the Workflow iQ Manager help file.
About Feith Workflow iQ Manager	View Workflow iQ Manager version, build, and copyright information. You may also view **Session Info** including the user logged in, database server, and when you connected.

The Toolbars

There are a few toolbars used when working in Workflow iQ Manager. You may toggle the display of each toolbar in the **View** menu by checking them on or un-checking them off as desired.

- **Standard Toolbar:** Perform standard actions such as create a new workflow, open a workflow, view workflow properties, copy, paste, zoom, etc.
- **Administrator Toolbar:** Interact with the workflow map using navigation tools and add tasks, routes, and graphical elements.
- **Rex Toolbar:** Interact with and control the Feith Rules Engine (Rex), which moves work items through the workflow.

Standard Toolbar

Perform standard actions such as create a new workflow, open a workflow, view workflow properties, copy, paste, zoom, etc.

To toggle the display of the standard toolbar select **View>Standard Toolbar**.

TOOL	ACTION
Refresh Work Item Counts	Refresh the work item counts displayed above the tasks. Hover your mouse over this button to see how long before Workflow iQ Manager automatically refreshes the counts.
New Workflow	Create a new workflow.
Open Workflow	Open a workflow.
Save Draft	Save a personal draft of the workflow with the changes you have made without putting the changes into production.
Print	Print the workflow map.
Workflow Properties	View or modify the workflow's properties, including its name, description, base file cabinet, and administration group.
Workflow Permissions	View or modify supplemental permissions to the workflow for users or groups that are not in the administration group or are not a super administrator user.
Cut	Cut a task, graphical element, or text and move it to the clipboard. If you want to move a route, see Add Routes for more information.
Copy	Copy a task, graphical element, or text to the clipboard. If you want to copy a task with its routes, use **Clone** instead. If you want to copy a route, see Add Routes for more information.
Paste	Paste the contents of the clipboard, such as a task, graphical element, or text.
Undo	Undo the previous action. There are four levels of undo per workflow.

Redo	Redo the previous undone action.
Zoom In	Zoom in the workflow map.
Zoom Out	Zoom out the workflow map.
100 % **Zoom Percentage**	Select or enter the desired zoom percentage.
Zoom to Fit	Zoom to fit the entire workflow map in the Workflow iQ Manager screen.

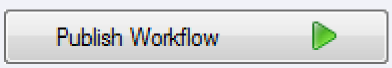
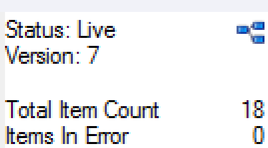
Administrator Toolbar

Interact with the workflow map using navigation tools and add tasks, routes, and graphical elements. The administrator toolbar is located on the left-hand side of the Workflow iQ Manager screen when viewing a workflow.

To toggle the display of the administrator toolbar select **View>Administrator Toolbar**.

TOOL	ACTION
Pointer	Select an object in the workflow map. You may select multiple objects by clicking on the map and drawing a box around the objects you want to select, or by holding down **CTRL** or **SHIFT** and selecting the desired objects. With one or more objects selected, click-and-drag to move the objects in the workflow map. To de-select one or more objects click in an empty space in the workflow map. **Tips:** • Switch to the **Pointer** tool using **CTRL+1**. This may be helpful when you want to quickly switch back to the pointer tool after placing tasks or drawing routes. • With the **Pointer** tool selected, hold down **SHIFT** to temporarily switch to the **Grabby Hand** tool and scroll the map with click-and-drag.
Grabby Hand	Click-and-drag to scroll the workflow map.
Zoom Box	Left-click to zoom in and **CTRL+left-click** to zoom out. You may also click on the map and drag to draw a box around the part of the map you want to zoom in on.

Tasks	Expand or collapse the list of task types. See Add Tasks for more information on task types and adding tasks to a workflow. To add a task to a workflow: 1. Select the desired task tool in the administrator toolbar. 2. Click on the workflow map to add a task. Click in multiple locations to add more tasks.
User	Add user task.
Hub	Add hub task.
Rendezvous	Add rendezvous task.
Wait-For	Add wait-for task.
Subflow	Add subflow task.
End	Add end task.
Deadline	Add deadline task.
Information	Add information task.
Routes	Expand or collapse the list of route types. See Add Routes for more information on route types and adding routes to a workflow. To add a route to a workflow: 1. Select the desired route tool in the administrator toolbar. 2. Click on the origin task and drag the cursor over the destination task and release the mouse button. The route is drawn between the two tasks and the route arrow indicates the route direction.
Automatic	Add automatic route.
Single-Select Manual	Add single-select manual route.
Multi-Select Manual	Add multi-select manual route.
Optional	Add optional route.
Conditional	Add conditional route.
Deadline	Add deadline route.
Error	Add error route.

Auto-Distribute	Add auto-distribute route.
Information	Add information route.
Graphical Elements	Expand or collapse the list of graphical elements. See Add Graphical Elements for more information.
Text	Click on the workflow map to add a text box and then type the desired text.
Label	Click on the workflow map to add a label. You may double-click the label to enter text if desired.
Picture	Click on the workflow map to add a picture and then double-click the picture to select the desired picture file. It is recommended to use small images.
Box	Click on the workflow map and drag to draw a box.
Wormhole	Click on the workflow map to add a wormhole then draw a route that goes through the wormhole.
 **Admin Button**	The admin button changes between common administrative actions depending on the state of the workflow, including **Publish Workflow**, **Check Out Workflow**, and **Undo Check Out**.
 **Current Workflow Information**	Information on the workflow, including: • Workflow **Status**. A workflow may be **In Development**, **Live**, or **Deleted**. See Workflow and Version Status for more information. • Workflow **Version** number. If the workflow is checked out it says the workflow map is a **Checked Out Draft** and displays the version number the draft is **Based On**. • The **Total** number of work items in the workflow. • The number of work items in **Error** in the workflow.

Rex Toolbar

Interact with and control the Feith Rules Engine (Rex), which moves work items through the workflow.

To toggle the display of the Rex toolbar select **View>Rex Toolbar**.

TOOL	ACTION
gwyn:1551 **Rex Connection**	Your Rex connection. If the Rex connection text is blue then Rex is working the workflow; if the Rex connection is **red** then Rex is not working the workflow. **Tip:** Mouse over the text **Rex Connection** to see how much time there is until the next time Rex is scheduled to process workflows.
/ **Rex Status**	The status of Rex, either connected to Workflow iQ Manager or disconnected from Workflow iQ Manager.
Process Workflows (and other actions)	Process work items in the workflows now or request Rex to do other types of processing, such as checking polled conditions, wait-for task rules, or deadlines.
Rex Monitor	View the Rex Monitor, which displays what Rex is doing and when.

The Workflow Tabs

Each open workflow has a tab and the workflow tabs display in the upper left of the Workflow iQ Manager screen next to the administrator toolbar.

Note: A workflow tab with a checkmark icon ✔ is checked out by you. See Modify Workflow for more information.

Select Workflow Tabs

Left-click a workflow tab to view that open workflow.

Tip: Use the keyboard shortcut **CTRL+TAB** to go to the next open workflow, moving left to right. Use **SHIFT+CTRL+TAB** to go to the previous open workflow, moving right to left.

Remember Open Workflows

Have Workflow iQ Manager remember which workflows you had open when you last exited Workflow iQ Manager. The next time you open Workflow iQ Manager those workflows are opened automatically.

Turn this option on by selecting **File>Remember Open Workflows**.

Reorder Workflow Tabs

Arrange the workflows in the desired order.

To reorder workflow tabs:

- Click-and-drag the workflow tab to the desired location.

Close Workflow Tabs

To close one or more workflow tabs:

- Right-click on a workflow tab and select the desired option:
  - **Close:** Close the right-clicked workflow.
  - **Close All:** Close all workflows.
  - **Close Others:** Close all open workflows except the right-clicked workflow.

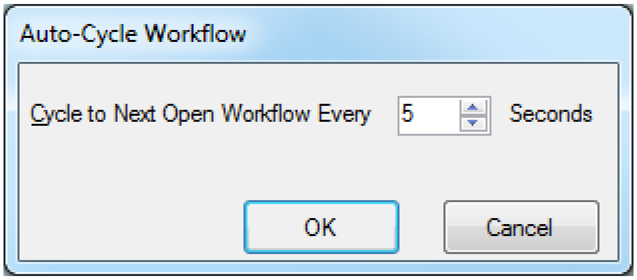
Tip: Close a workflow with a "middle-click" on its tab using the mouse wheel.

Auto-Cycle Workflow Tabs

Turn on **Auto-Cycle** to have Workflow iQ Manager automatically switch the display between open workflows at a specified interval. This is useful for monitoring multiple workflows at once if you do not want to manually switch between them.

To turn on auto-cycle:

1. Select **View>Auto-Cycle**. The **Auto-Cycle Workflow** dialog opens.
2. Enter how often you want to cycle to the next workflow



3. Click **OK**. Workflow iQ Manager auto-cycles from one workflow to the next at the specified interval.

The Workflow Map

The workflow map contains the tasks, routes, and graphical elements illustrating the workflow. There are a few basic tools for interacting with the workflow map as well as several display options. You may also print the workflow map.

- Basic Tools
- Map Display Options
- Print the Workflow Map

For information on adding tasks, routes, and graphical elements see Add Tasks, Add Routes, and Add Graphical Elements.

Basic Tools

There are a few basic tools for interacting with the workflow map:

- **Pointer:** Select and interact with objects in the workflow map using the **Pointer** tool from the administrator toolbar.

  Tips:

  - Switch to the **Pointer** tool using **CTRL+1**. This may be helpful when you want to quickly switch back to the pointer tool after placing tasks or drawing routes.
  - With the **Pointer** tool selected, hold down **SHIFT** to temporarily switch to the **Grabby Hand** tool and scroll the map with click-and-drag.

- **Grabby Hand:** Besides the traditional scroll bars, you may scroll the workflow map with click-and-drag using the **Grabby Hand** tool from the administrator toolbar. With the grabby hand tool selected you may also double-click a task or route to view its properties.

- **Zoom Box**: Left-click to zoom in and **CTRL+left-click** to zoom out using the **Zoom Box** tool from the administrator toolbar. You may also click on the map and drag to draw a box around the part of the map you want to zoom in on.

- **Standard Toolbar:** On the standard toolbar use the **Zoom In** and **Zoom Out** buttons or specify a **Zoom Percentage** 100 % by selecting or entering the desired zoom. You may also click **Zoom to Fit** to fit the entire workflow map in the Workflow iQ Manager screen.

Map Display Options

There are several display options for the workflow map.

To choose your preferred theme for the workflows:

1. Select **View>Theme**. The theme list displays.
2. Select the desired theme. The selected theme is applied to the workflows.

To choose you preferred background color for the workflows:

1. Select **File>Background Color**. The **Color** dialog opens.
2. Select the desired color.
3. Click **OK**. The selected background color is applied to the workflows.

To choose a background image for the workflows.

1. Select **View>Background Image>Choose Image**. The **Open** dialog displays.
2. Choose the desired image and click **Open**. The background image is applied to the workflows.

   You may optionally tile the background image by selecting **View>Background Image>Tile Image**.

To clear the background image:

- Select **View>Background Image>Clear Image**.

To choose the desired grid density when viewing a checked-out workflow.

- Select **View>Grid Density** and select either the **Dense** or **Sparse** pattern. The selected density is applied to the workflows.

To choose the default route style:

- Select **View>Default Route Style** and choose from the options **Polyline**, **Polyline with Destination Arrow**, and **Bezier Curve**. See Add Routes for more information.

To choose the default font, size, style, and color for task labels, route labels, and graphical elements:

1. Select **View>Default Font**. The **Font** dialog opens.
2. Choose the desired font options and click **OK**. Objects with text added from this point forward will use the new font options.

To turn animation on or off:

- Select **View>Animation** to toggle animation of routes that indicates the progress of work items through the workflow.

To turn all task labels on or off:

- Select **View>Task Labels.**

To turn all route labels on or off:

- Select **View>Route Labels.**

To turn work item counts above tasks on or off:

- Select **View>Work Item Counts**.

To choose the font, size, style, and color for work item counts above tasks:

1. Select **View>Work Item Count Font**. The **Font** dialog opens.
2. Choose the desired font options and click **OK**. The new font options are applied to the work item counts.

Print the Workflow Map

You may print the workflow map as well as preview the printout and set the desired print settings.

To print the workflow map:

1. Select **File>Print**. The **Print** dialog opens.
2. Select the desired options and click **OK**. The workflow is printed.

Notes:

- The printout always has a plain white background (regardless of your selected background color or whether you have a background image).
- The printing time will be considerably longer if a high number of tasks have custom pictures.

To preview the printout:

- Select **File>Print Preview**. The **Print preview** dialog opens.

To adjust the page settings for printing:

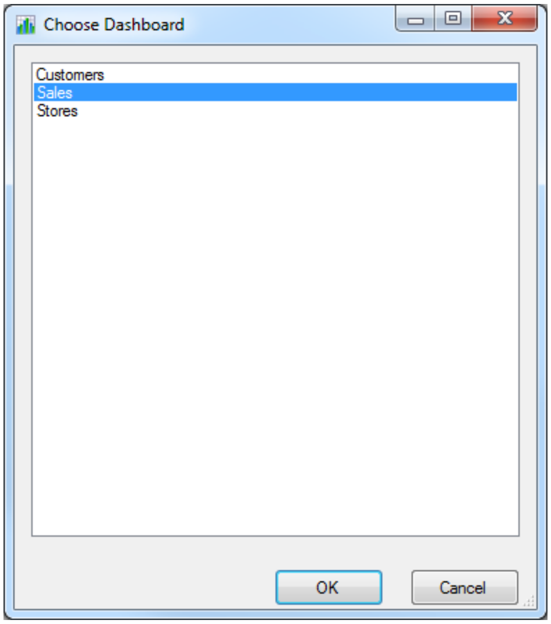
1. Select **File>Page Setup**. The **Page Setup** dialog opens.
2. Select the desired options and click **OK**. The page settings are saved.

The Dashboard iQ Pane

View a **Dashboard iQ** dashboard, which may be configured to show workflow processing or other relevant information, inside Workflow iQ Manager next to your workflows. Dashboards are created in Feith Dashboard iQ.

To turn on the Dashboard iQ Pane:

1. Select **View>Dashboard iQ**. The **Choose Dashboard** dialog opens.



2. Double-click a dashboard. The Dashboard iQ Pane opens at the bottom of the Workflow iQ Manager screen and displays the selected dashboard.

Dashboard iQ Pane Display Options

- Mouse over the top of the Dashboard iQ pane to get a re-sizing cursor and click-and-drag the pane to adjust it to the desired height.
- Click **Refresh** to refresh the dashboard and display the latest data. The dashboard will refresh on its own at a regular interval.
- Click **Choose Dashboard** to choose a different dashboard to view.
- Click **Pop Dashboard To Web Browser** to view the dashboard in the full web browser.

Undo and Redo

You may undo your previous action or redo the previous undone action. There are four levels of undo per workflow.

To undo an action:

1. Select **Edit>Undo**. Alternatively, click **Undo** on the standard toolbar or use **CTRL+Z**.

   The **Undo** menu option under **Edit** specifies the action that will be undone (e.g., **Undo Add Task**, **Undo Delete**, **Undo Edit Route**). If the action cannot be undone (e.g. publish a workflow), the **Undo** menu option is disabled and states **Can't Undo**.
2. The previous action in the current workflow is undone.

To redo an undone action:

1. Select **Edit>Redo**. Alternatively, click **Redo** on the standard toolbar or use **CTRL+Y**.

   The **Redo** menu option under **Edit** specifies the action that will be redone (e.g., **Redo Add Task, Redo Delete, Redo Edit Route**).
2. The previous undone action in the current workflow is redone.

Note: Once you have published or checked in a version of the workflow, you cannot undo or redo an action that you performed beforehand.

Design Workflows

Create a New Workflow

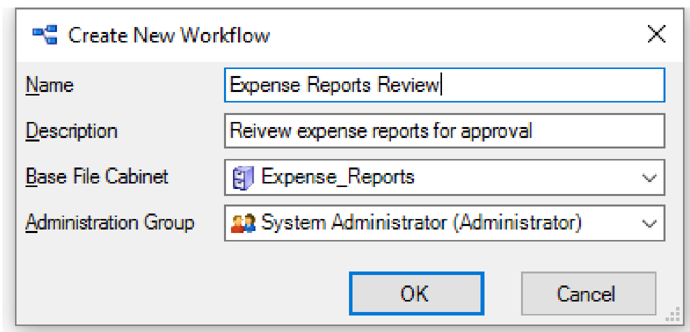
Create a new workflow to process your FDD documents through a set of defined business rules.

Note: In order to create a new workflow you must have the **Workflow Administration** task permission. See Workflow Permissions for more information.

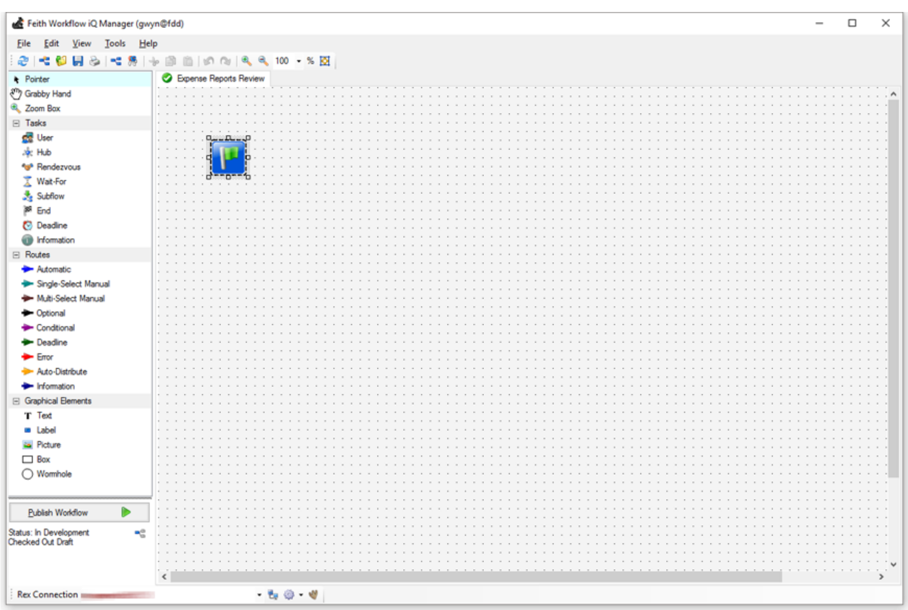
To create a new workflow:

1. Click **New Workflow** in the standard toolbar. The **Create New Workflow** dialog opens.
2. Enter the workflow **Name**. The name may be up to 32 characters long.
3. Optionally enter a **Description**. The description may be up to 128 characters long.
4. Select the workflow's **Base File Cabinet** which contains the FDD documents you want to process through the workflow. FDD documents that meet the workflow's start condition will be added to the workflow (see Set Start Condition for more information).
5. Select the workflows **Administration Group**, the members of which may access the workflow in Workflow iQ Manager and the workflow's admin file cabinet in the clients, as well as receive an email from Rex when an error occurs in the workflow (see Errors for more information).

   Note: Only workflow users and groups with members that are workflow users are included in the list. See **Feith Control Panel User Guide** for more information.

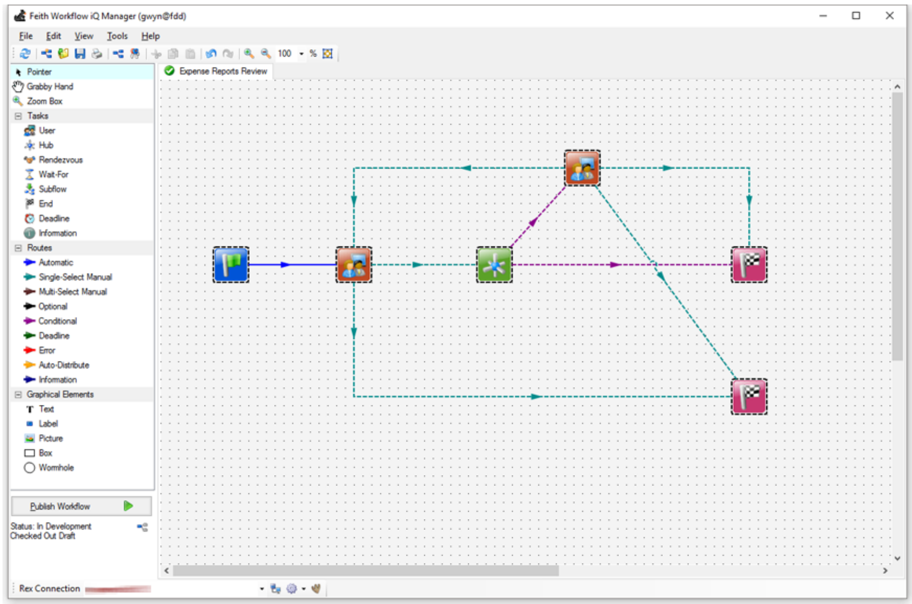
6. Click **OK**. The new workflow is displayed and begins with a start task (see Start Task for more information).

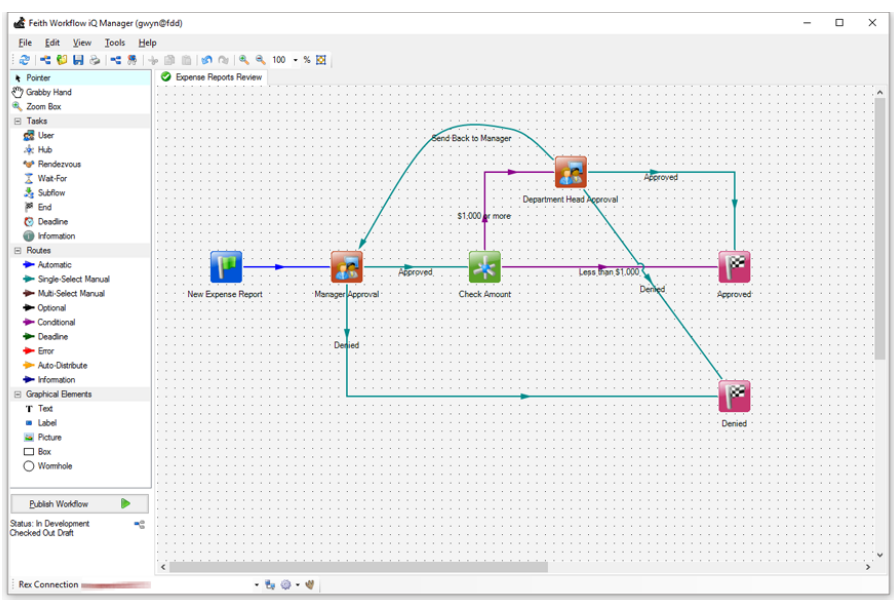
7. Add tasks, routes, and graphical elements to the workflow map as desired. See [Add Tasks](), [Add Routes](), and [Add Graphical Elements]() for more information.

   Some task and route types have required settings that must be configured in order to be considered "complete". An incomplete task has a dashed outline; an incomplete route is a dashed line.

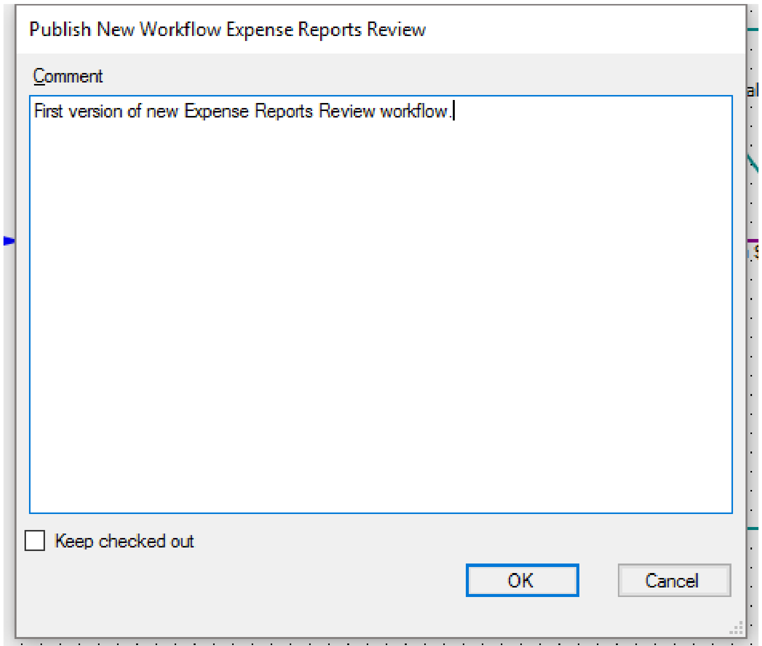
   Tip: While adding tasks, routes, and graphical elements, you can quickly switch back to the **Pointer** tool using **CTRL+1**.



   As you develop the workflow, click **Save Draft** to save a personal draft of your workflow. If you want another user to see or work on the workflow in development, you can select **File>Check In Version** to make a non-published version of the workflow available for them to access. See [Save Draft]() and [Check In Version]() for more information.

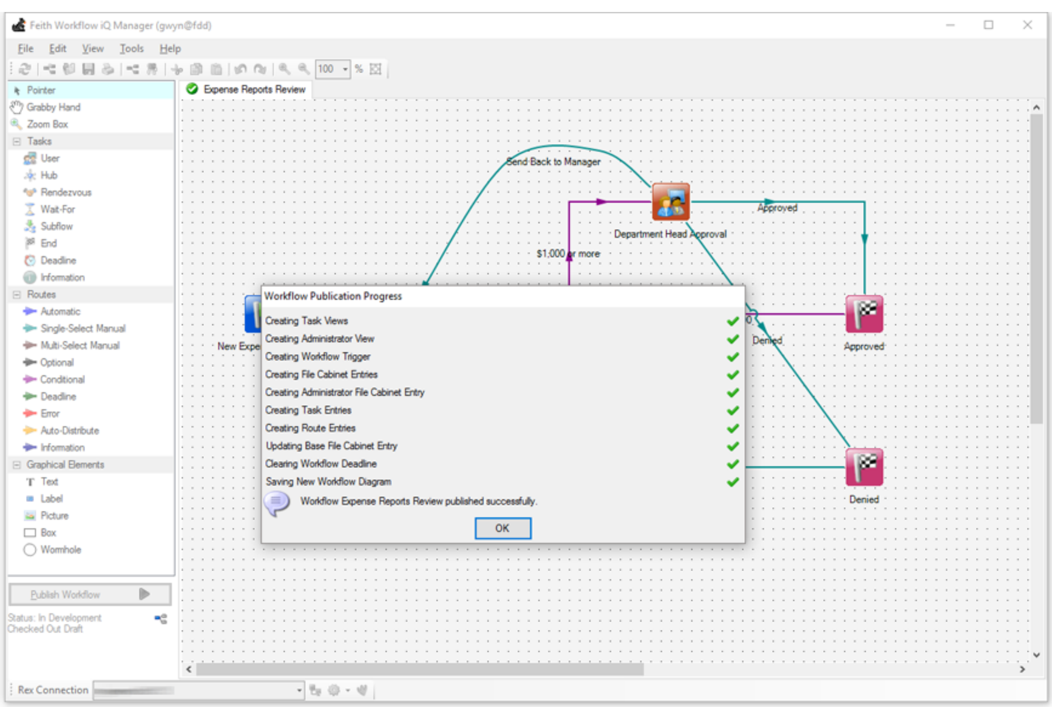


8. When the workflow design is complete, **Publish** the workflow to put it into production (see [Publish Workflow](#) for more information). The **Publish New Workflow** dialog opens, prompting for a comment on the new workflow version.
9. Enter a comment on the workflow version and, if desired, check **Keep checked out** to keep the workflow checked out after the publish.



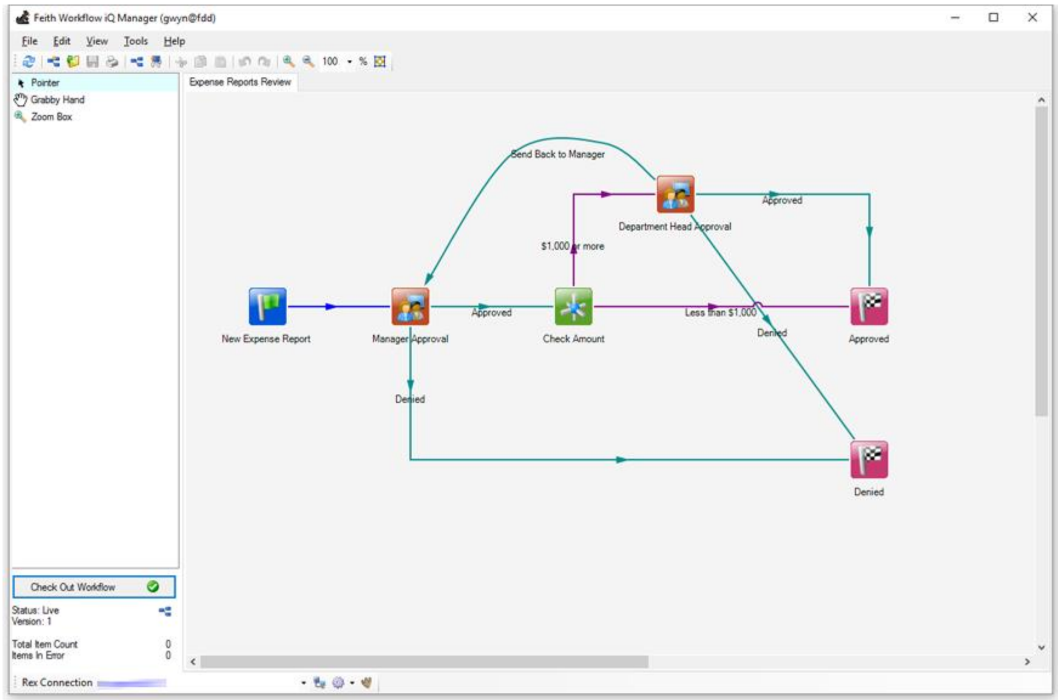
10. Click **OK**. The **Workflow Publication Progress** dialog opens and the workflow publishing process begins and shows a progress bar for each step taken until the workflow publish is completed.

    Note: If there are any incomplete tasks or routes, you will be prompted to complete their configuration when attempting to publish the workflow. Once all tasks and routes are complete, then publish the workflow.



11. When publication is complete, click **OK**. The workflow is published and live.

    Tip: If the **Rex Connection** in the Rex toolbar is **red**, Rex does not yet know about the workflow in order to process it. Rex will find the workflow and begin processing on its own, or you can force Rex to take over the workflow by clicking the down arrow on the Rex action button  in the Rex toolbar and selecting **Take Over Workflow Processing**.



Add Tasks

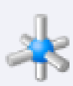
A **task** is a node where work is done, such as by a user, a program called by command line, or other work. A task is represented by an icon in the workflow map. There are several task types as well as various display options.

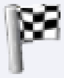
See the following sections for instructions:

- Task Types
- Add and Arrange Tasks
- Task Display Options
- Find Task

Task Types

There are several task types:

ICON	TYPE
	**Start Task** Where work items - FDD documents or folders - enter the workflow. Every workflow beings with a start task and there is only one start task in a workflow.
	**User Task** A step requiring user action where an FDD user retrieves and processes work items. For example, a user may enter additional information for a document, verify the presence and accuracy of a document and its information before it moves forward, or review a document for approval.
	**Hub Task** An intersection in the workflow. Hub tasks can also be used to run an automated program. For example, an intersection may be used to conditionally route work items to other tasks or a program may run to export the work item's pages.
	**Rendezvous Task** Collects and combines copies of a work item, such as when the work item was split across multiple paths earlier in the workflow.
	**Wait-For Task** Waits for one or more specified conditions to be true for a given work item. For example, a work item may wait until another needed document exists in order to move forward in the process.
	**Subflow Task** Routes a work item to another workflow, which will be processed there until it returns back "up" to the "parent" workflow.

	**End Task** An end point of the workflow where a work item arrives when it has finished going through the workflow process.
	**Deadline Task** Work items that have been in the workflow "too long" by reaching a specified deadline are sent to this task. Each workflow can only have one deadline task. For example, tasks following a deadline task may be designed to make sure these "late" work items get addressed.
	**Information Task** A purely illustrative task that represents a step in the process that occurs outside the workflow. Information tasks can also be used to show a summary of the work item counts across multiple tasks and even multiple workflows. For example, a scan step may occur before the start of the workflow and an email step may occur after the end of the workflow. Also, a work item count could be shown for a section of related tasks in the workflow.

Add and Arrange Tasks

There are various ways to add and arrange tasks.

To add a task to the workflow map:

1. Select the desired task tool in the administrator toolbar.
2. Click on the workflow map to add a task. Click in multiple locations to add more tasks.

   Tip: After adding tasks, you can quickly switch back to the **Pointer** tool using **CTRL+1**.

To move tasks or align them horizontally or vertically:

1. Use the **Pointer** tool to select one or more tasks. You can select multiple tasks by clicking-and-dragging a selection box around the desired tasks or using **CTRL+click**.
2. Move or align the tasks:
   - Move the task(s) to the desired location using click-and-drag or the arrow keys.
   - Right-click one of the selected tasks and select **Align Horizontally** or **Align Vertically**.

To copy a task:

1. Right-click the desired task and select **Copy**. The task is copied to the clipboard.

   To copy multiple tasks, use the **Pointer** tool to select multiple tasks by clicking-and-dragging a selection box around the desired tasks or using **CTRL+click**, and then right-click one of the selected tasks and select **Copy**.
2. Right-click in the desired location and select **Paste**. A copy of the original task(s) is pasted on the map.

To clone a task with its input and output routes:

- Right-click the desired task and select **Clone**. The task with its input and output routes is cloned and added to the map.

  To clone multiple tasks, use the **Pointer** tool to select multiple tasks by clicking-and-dragging a selection box around the desired tasks or using **CTRL+click**, and then right-click one of the selected tasks and select **Clone**.

Task Display Options

There are various display options for tasks.

To change a task icon to another picture:

1. Right-click the desired task and select **Change Picture**. The **Open** dialog displays.

2. Choose the desired image and click **Open**. The task's picture is changed.

To revert a custom task picture back to the original icon:

- Right-click the desired task and select **Revert Picture**. The task picture is reverted back to the original icon.

To show or hide a task label:

- Right-click the desired task and select **Hide Text** to hide the label or **Show Text** to show the label.

  To show or hide labels for multiple tasks, use the **Pointer** tool to select multiple tasks by clicking-and-dragging a selection box around the desired tasks or using **CTRL+click**, and then right-click one of the selected tasks and select **Hide Text** or **Show Text**.

  To show or hide all task labels in a workflow, first select **Edit>Select All Tasks** then right-click a selected task and select **Hide Text** or **Show Text**.

  Tip: The view setting **View>Task Labels** may be used to toggle the display of all task labels across all workflows.

To change a task label's font, size, style, and color:

1. Right-click the desired task and select **Font**. The **Font** dialog opens.

   To change the label font for multiple tasks, use the **Pointer** tool to select multiple tasks by clicking-and-dragging a selection box around the desired tasks or using **CTRL+click**, and then right-click one of the selected tasks and select **Font**.

2. Choose the desired font options and click **OK**. The label font on the task(s) is changed.

Tip: Change the default font for all text in all workflows using **View>Default Font**.

Find Task

Find a task in the workflow by selecting **Edit>Find Task** and selecting the task from the task list. You are scrolled to the task in the workflow map.

Tip: In the task list hit the key of the first letter of the task name to jump to that part of the task list. Hit the letter key multiple times to cycle through all tasks that start with that letter. Also, use the up and down arrow keys in the task list to select the desired task.

Start Task

The **Start Task**  is where work items - FDD documents or folders - enter the workflow. Every workflow beings with a start task and there is only one start task in a workflow.

To configure the start task:

1. Double-click the start task. The **Task Administrator** opens.

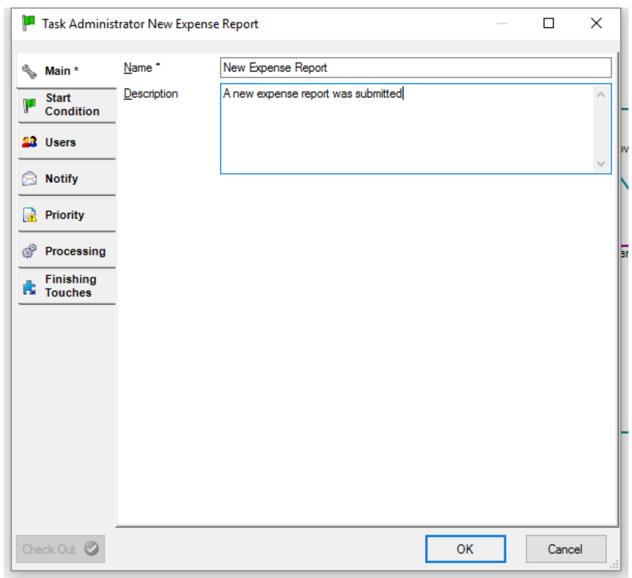
   Tip: As soon as the **Task Administrator** opens, you can take advantage of one of the following keyboard shortcuts:

   - Hit the **TAB** key once to quickly move to the **Name** field. This may be helpful when first adding tasks, especially if you are adding many tasks.
   - Use the up and down arrow keys to navigate to the desired tab.

2. On the **Main** tab:

   a. Enter the task **Name** The name may be up to 64 characters long.

   b. Optionally enter a **Description**. The description may be up to 80 characters long.



3. Set the **Start Condition**. The start condition restricts which FDD documents are added to the workflow from the workflow's base file cabinet. See Set Start Condition for more information.
4. Optionally assign **Users** who can manually add FDD documents to the workflow. See Assign Users to Start Task for more information.
5. Optionally **Notify** workers or other parties by email. See Notify for more information.
6. Optionally change a work item's **Priority**. See Priority for more information.
7. Optionally specify how many work items Rex should be **Processing** in the task in a given cycle. See Processing for more information.
8. Optionally assign **Finishing Touches** to run custom SQL when a work item leaves the task. See Finishing Touches for more information.
9. Click **OK**. The task is configured. The dashed outline is removed, indicating the task is complete.

Set Start Condition

The **Start Condition** restricts which FDD documents are added to the workflow from the workflow's base file cabinet. By default, all documents that are indexed into the workflow's base file cabinet are added to the workflow.

To configure the start condition:

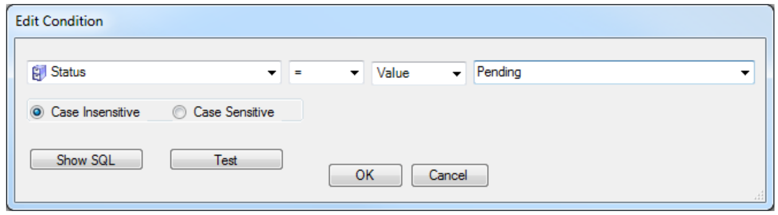
1. Double-click the start task. The **Task Administrator** opens.
2. On the **Start Condition** tab, choose the desired condition:
   - **Insert Condition:** FDD documents indexed into the base file cabinet that match the specified condition are automatically added to the workflow.
   - **Polled Condition:** FDD documents in the base file cabinet that match the specified condition are added to the workflow by Rex as it polls the base file cabinet.
   - **Manual Insertion or Subflow Only:** FDD documents in the base file cabinet can only be added to the workflow manually by a user or added from a "parent" workflow with a subflow task pointing to this workflow (see Subflow Task for more information).
   - **Note:** For a workflow built on a virtual file cabinet, it is generally recommended to not use an Insert Condition. When using an Insert Condition or Polled Condition for a workflow built on a virtual file cabinet, make sure that the start condition matches the virtual file cabinet condition (e.g. if the virtual file cabinet only contains documents of type "Application" then the start condition should also only look for documents of type "Application").
3. If you choose **Insert Condition** or **Polled Condition**, optionally enter a more specific condition for which FDD documents will be added. You may **Create** a "constructed" condition or write the **SQL** yourself:

   (**Note:** If you want to create a **FeithDrive** condition, see FeithDrive Start Condition.)

   - Create a "constructed" condition:
     1. Click **Create**. The **Edit Condition** dialog opens.
     2. Select the desired field or system value
     3. Select the desired operator. Operators include equal to **=**, not equal to **<>**, less than **<**, less than or equal to **<=**, greater than **>**, greater than or equal to **>=**, **IS** (NULL or NOT NULL), **IN** (SQL), **NOT IN** (SQL).
     4. Select whether you want to compare a **Value**, **Field**, **Function**, or **SQL**.
     5. If you selected to compare a **Value** or **SQL**, enter the value or SQL. If the field has a lookup table, you can select a value from the lookup values. If you selected to compare a **Field** or **Function**, select the field or function.
     6. Choose whether to check the value in a **Case Insensitive** or **Case Sensitive** manner.

        Tips:

        - Click **Test** to see if your condition works.
        - Click **Show SQL** to switch to the SQL view. Note that if you make changes in the SQL view, you cannot go back to the "constructed" condition unless you revert the SQL.



7. Click **OK**. The condition is added.

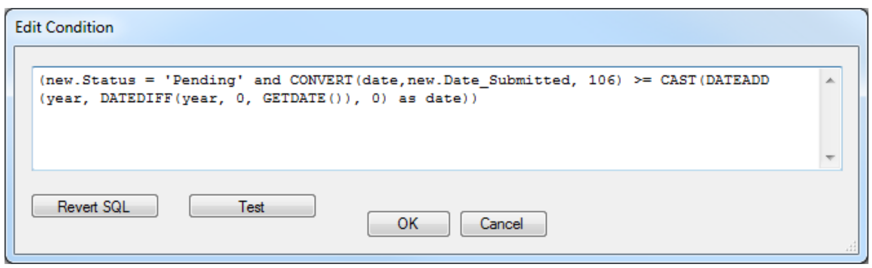
8. Optionally add more conditions by clicking **And** or **Or**. You can add more criteria to an **and** or **or** statement by selecting **and** or **or** and clicking **Add**.

   You can change an existing **and** to and **or**, or vice versa, by double-clicking the **and** or **or** and changing it to the desired operator in the **And or Or** dialog.

   Modify or **Delete** conditions as needed.

- Enter a SQL condition:

  1. Click **SQL**. The **Edit Condition** dialog opens.
  2. Enter a SQL condition.

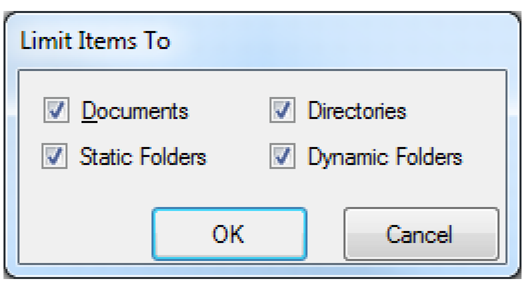


  3. Click **OK**. The condition is added.

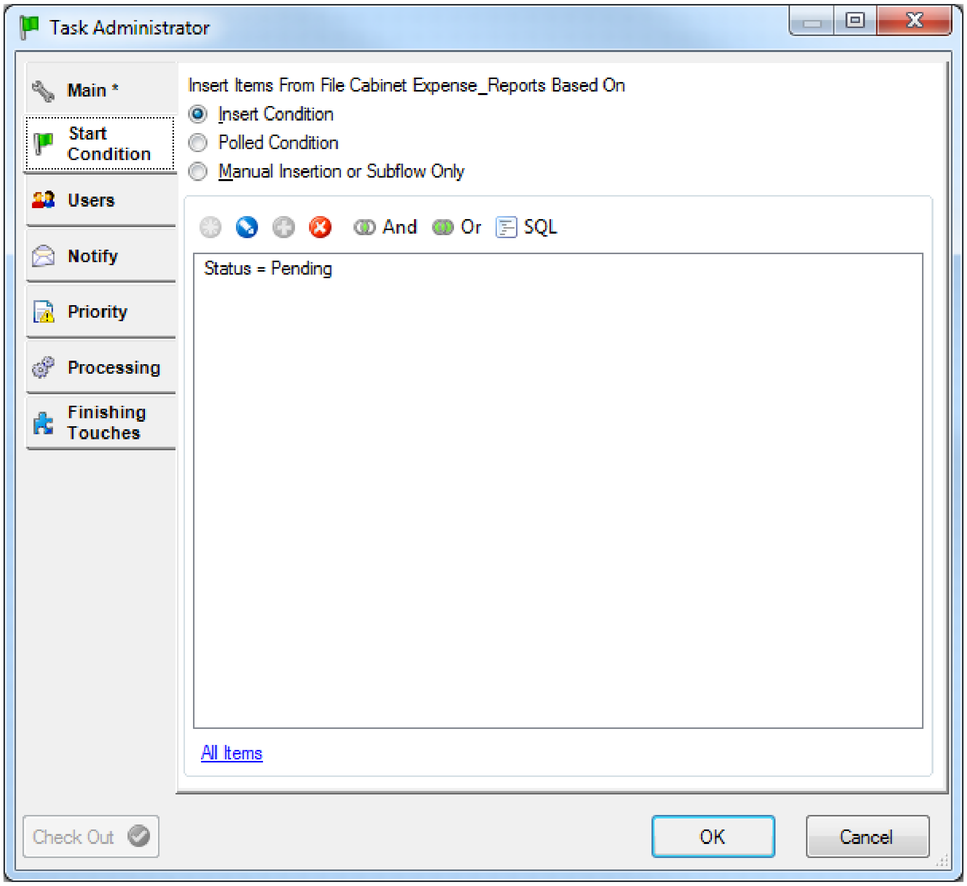
4. Optionally restrict the start condition further by specifying the "types" of FDD objects you want to go into the workflow (e.g. documents, static folders). To do so:

   a. Click the current select (e.g. **All Items**). The **Limit Items To** dialog opens.

   b. Check and uncheck the desired items.



c. Click **OK**. The items are limited.



5. Click **OK**. Your start condition is saved.

FeithDrive Start Condition

In the case of FeithDrive, if you want to specify in the start condition which FeithDrive documents will be added to the workflow, you will see a **FeithDrive** option if your workflow is built on:

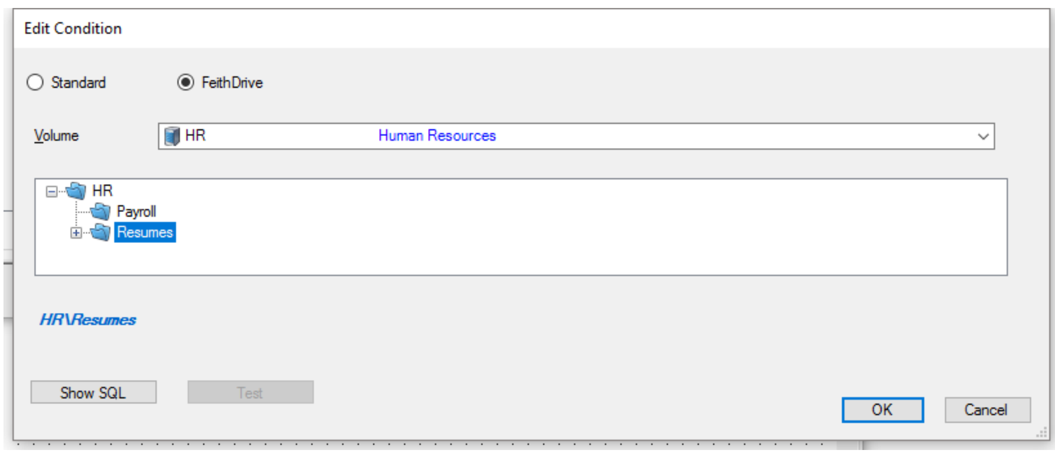
- The **FeithDrive Base** file cabinet.
- Any virtual file cabinet based on the **FeithDrive Base** file cabinet.

To set a FeithDrive start condition:

1. Click **Create** and the **Edit Condition** dialog opens.
2. Select **FeithDrive**. The FeithDrive condition options display.
3. Select the desired **Volume**. The directories in the volume display.
4. The volume's root directory is selected by default. Optionally find and select a specific directory in the volume. The volume/directory path displays in blue text at the bottom of the dialog.

   Documents in the specified volume/directory will be added to the workflow.

   Tip: Click **Show SQL** to switch to the SQL view. Note that if you make changes in the SQL view, you cannot go back to the "constructed" condition unless you revert the SQL.

5. Click **OK**. The condition is added.
6. Optionally add more conditions by clicking **And** or **Or** . You can add more criteria to an **and** or **or** statement by selecting **and** or **or** and clicking **Add** .

   You can change an existing **and** to and **or**, or vice versa, by double-clicking the **and** or **or** and changing it to the desired operator in the **And or Or** dialog.

   Modify or **Delete** conditions as needed.

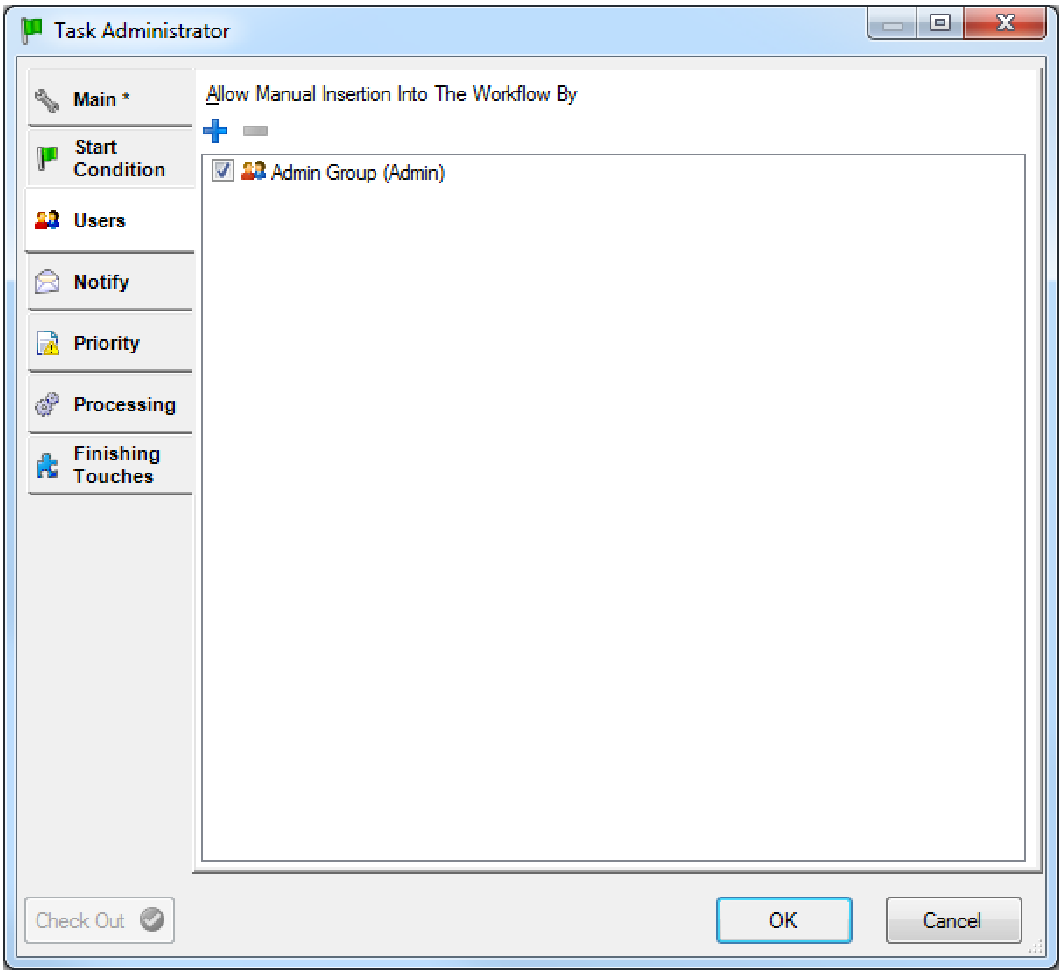
Assign Users to Start Task

Assign **Users** who can manually add FDD documents to the workflow.

To assign users to the start task:

1. Double-click the start task. The **Task Administrator** opens.
2. On the **Users** tab, click **Show All Selectable Groups and Users**. All workflow users and groups with members that are workflow users are displayed in the list.
3. Check the desired groups and users.

   Tip: In the group/user list hit the key of the first letter of the group/user name to jump to that part of the list. Hit the letter key multiple times to cycle through all groups/users that start with that letter. Also, use the up and down arrow keys to navigate in the group/user list.

4. Click **OK**. Your user assignment is saved.

User Task

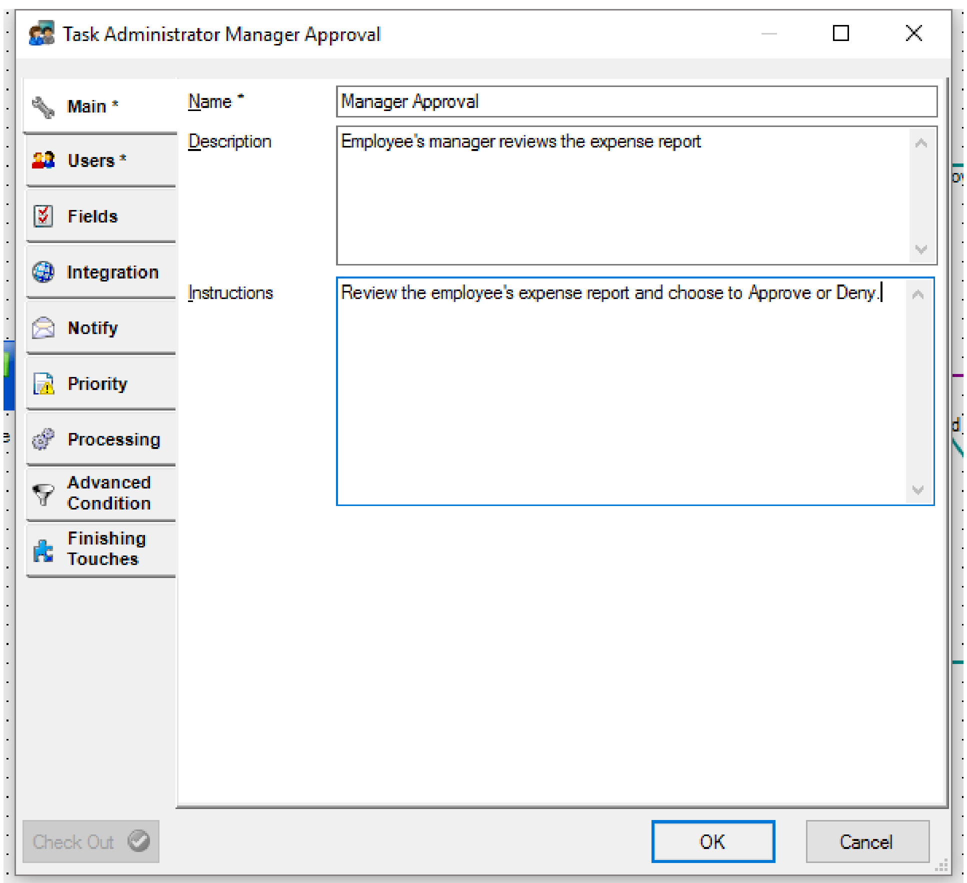
A **User Task**  is a step requiring user action where an FDD user retrieves and processes work items. For example, a user may enter additional information for a document, verify the presence and accuracy of a document and its information before it moves forward, or review a document for approval.

To add a user task:

1. Select the **User** task tool in the administrator toolbar.
2. Click on the workflow map. The task is added.
3. Double-click the user task. The **Task Administrator** opens.

   Tip: As soon as the **Task Administrator** opens, you can take advantage of one of the following keyboard shortcuts:

   - Hit the **TAB** key once to quickly move to the **Name** field. This may be helpful when first adding tasks, especially if you are adding many tasks.
   - Use the up and down arrow keys to navigate to the desired tab.
4. On the **Main** tab:
   a. Enter the task **Name**. The name may be up to 64 characters long.
   b. Optionally enter a **Description**. The description may be up to 80 characters long.
   c. Optionally enter **Instructions** that the end user can read in the client (FDD or WebFDD).



5. Assign **Users** and groups who will process work in the task and their permissions in the task. You may also optionally configure an **Overflow Condition** to add more workers to the task when the task's work item count reaches a certain number. See Assign Users to User Task for more information.
6. Configure the task **Fields** that will appear to users who process work in the task. See Configure Fields for more information.
7. Optionally configure **Integration** options to help workers process documents, including **Integration Links** and **Work-o-grams**. An integration link sends the worker to a related form, application, or URL when they are processing work in the task. A work-o-gram enables workers to process work in a task by email. See Assign Integration Link and Configure Work-o-gram for more information.
8. Optionally **Notify** workers or other parties by email. See Notify for more information.
9. Optionally change the work item's **Priority**. See Priority for more information.
10. Optionally specify how many work items Rex should be **Processing** in the task in a given cycle. See Processing for more information.
11. Optionally set an **Advanced Condition** to restrict which work items are available to which users. See Set Advanced Condition for more information.
12. Optionally assign **Finishing Touches** to run custom SQL when a work item leaves the task. See Finishing Touches for more information.
13. Click **OK**. The task is configured. The dashed outline is removed, indicating the task is complete.

Assign Users to User Task

Assign **Users** and groups who will process work in the task and their permissions in the task. The task appears in their **Work to Do** list in the clients (FDD and WebFDD). You may also optionally configure an **Overflow Condition** to add more workers to the task when the task's work item count reaches a certain number (see Set Overflow Condition for more information).

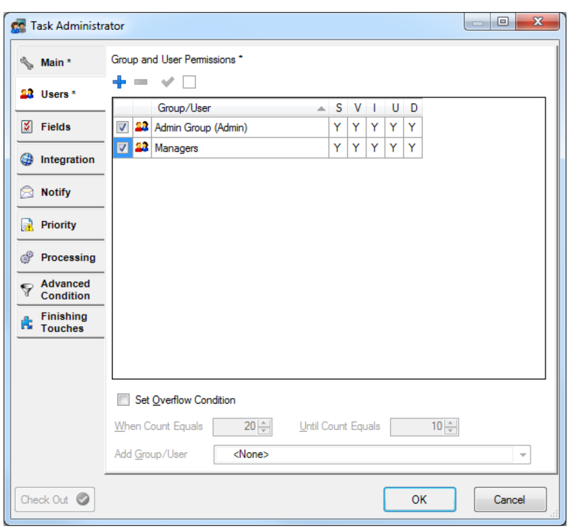
Permissions include:

- **Search:** Users can see the task and retrieve work in it.
- **View:** Users can view the work item's pages.
- **Insert:** Users can add pages to the work item.
- **Update:** Users can update the work item's index values.
- **Delete:** Users can delete pages from the work item.

To assign groups and users to a user task:

1. Double-click the user task. The **Task Administrator** opens.
2. On the **Users** tab, click **Show All Selectable Groups and Users** **.** All workflow users and groups with members that are workflow users are displayed in the list.
3. Select the groups and users to assign and their permissions:
    - To grant all permissions to a group or user, check the checkbox next to their name.

      Tip: In the group/user list hit the key of the first letter of the group/user name to jump to that part of the list. Hit the letter key multiple times to cycle through all groups/users that start with that letter. Also, use the up and down arrow keys to navigate in the group/user list.
    - To grant all permissions to multiple groups and users at once, select multiple groups and users using **CTRL+click** or **SHIFT+click** then right-click one of the selected groups/users and select **Grant Permission** .
    - To grant specific permissions to a group or user, click in the desired boxes to the right for the **Search**, **View**, **Insert**, **Update**, and **Delete** permissions to change them to **Y** for granted or blank for denied.
    - To remove a group or user from the task, uncheck the checkbox next to their name.



4. Click **OK**. Your user assignment is saved.

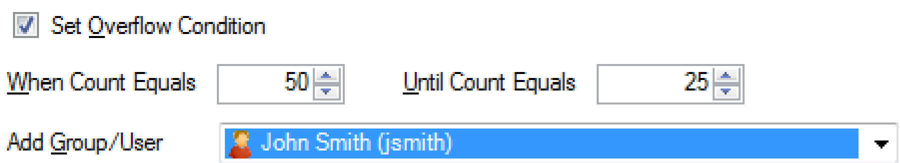
Set Overflow Condition

An **Overflow Condition** adds more workers to the task when the task's work item count reaches a certain number, for the purpose of helping the usual workers to address the large number of work items. The additional workers get all resource permissions on the task, including **Search**, **View**, **Insert**, **Update**, and **Delete**. When the task's work item count falls back below a certain number, the extra workers are removed.

To set an overflow condition:

1. Double-click the user task. The **Task Administrator** opens.
2. On the **Users** tab, check on **Set Overflow Condition**. The overflow condition options are enabled.
3. In the **When Count Equals** field, enter the high number of work items that will cause additional workers to be added to the task.
4. In the **Add Group/User** field, choose the group or user that will be added when the high count is reached.

   Note: Adding a group/user is optional; you may leave it set to **<None>**. In this case, no extra workers are assigned to the task but the usual workers are still notified when an overflow occurs.
5. In the **Until Count Equals** field, enter the low number of work items that will cause the additional workers to be removed from the task, when they are no longer needed.



6. Click **OK**. Your overflow condition is saved.

Configure Fields

Configure the task **Fields** that will appear to users who process work in the task. By default, all fields with their properties from the workflow's base file cabinet are included in the user task. You may remove fields from the task and change the task field's properties, such as making a field required or assigning a lookup table.

Note: Changing field properties in a user task does not affect the field properties in the workflow's base file cabinet. For example, if you assign a lookup table to a user task field, that lookup will not be assigned to the field in the workflow's base file cabinet.

To configure user task fields:

1. Double-click the user task. The **Task Administrator** opens.
2. On the **Fields** tab, check on fields you want to include in the user task and uncheck fields you do not want to include in the user task. Quickly check on all fields by clicking **Include All** or quickly check off all fields by clicking **Exclude All**.

   Note: You must include at least one field in a user task. If no fields are included, the user task is considered incomplete and has a dashed outline.
3. Optionally configure fields to be **Read Only**, preventing them from being modified.

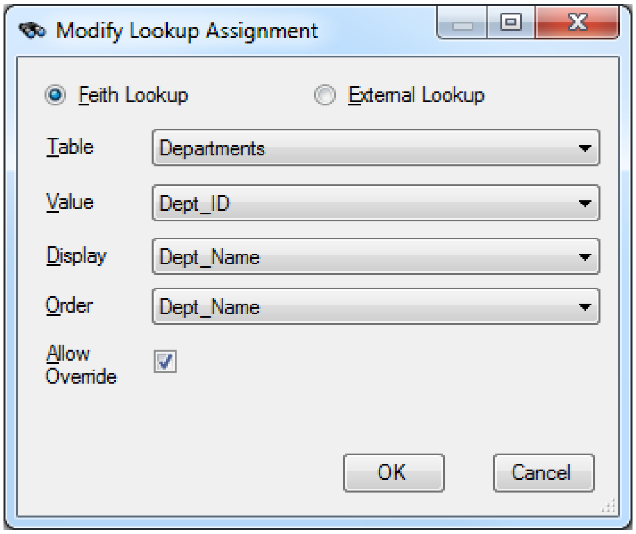
   Note: A Signature type field must be read only.
4. Optionally configure fields to be **Required**, requiring them to contain a value.

   Notes:

   - If the field in the base file cabinet is required, then the **Required** setting cannot be changed and will remain on for that field in the user task.
   - This option is disabled if the field is already marked as **Read Only**.
5. Optionally configure fields to have a **Lookup Assignment**, assigning a lookup table which provides the user with a list of values to choose from for that field.

   To assign a lookup to a field:

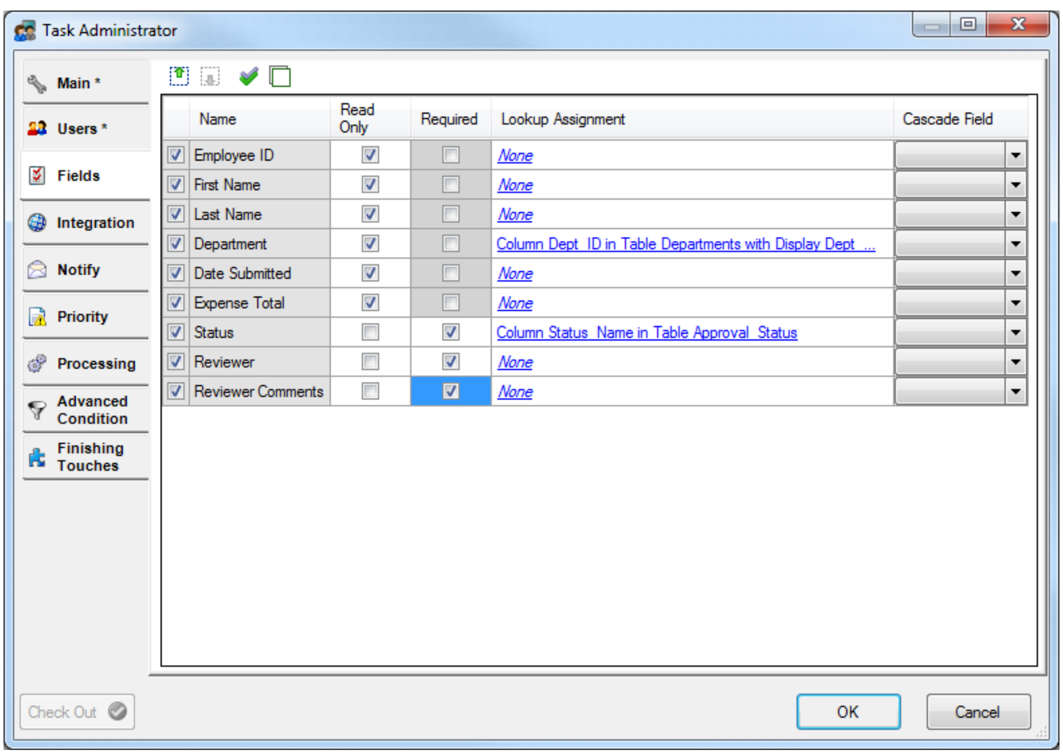
   a. In the **Lookup Assignment** column, click **None**. The **Modify Lookup Assignment** dialog opens.
   b. Choose whether to use a **Feith Lookup** or **External Lookup**:
      - A **Feith Lookup** is a standard Feith lookup table made in Feith Control Panel. See **Feith Control Panel User Guide** for more information.
      - An **External Lookup** is any table or view in the database, which you may want to use if the data you want is not in a standard Feith lookup table.
   c. Select or enter the lookup **Table** name.
   d. Select or enter the **Value** from the lookup that will be stored in the field.
   e. Optionally select or enter the friendly **Display** from the lookup table that can be used to clarify or help find the **Value** (e.g. a "Department Name" display for a "Department ID" value).
   f. Optionally select or enter the column by which to **Order** the lookup values. If an order column is not selected, order defaults to the **Value** column.
   g. Optionally select whether to **Allow Override**, allowing users to enter a value that is *not* in the lookup table. If you leave this option off, the users *must* select a value from the lookup table.



6. If you are using lookup tables, optionally select a **Cascade Field** to filter the field's lookup values based on another field. You can only select a **Cascade Field** that is based on the same lookup table. For example, if you have a "State" field with the "Locations" lookup assigned you may have a "City" field also with the "Locations" lookup assigned and choose to filter the lookup values for "City" based on the value selected for "State".

   Note: The following file cabinet field types are not available in the **Cascade Field** list: Signatures, List of Strings, List of Numbers, and List of Dates.

7. Optionally reorder fields by selecting a field **Name** and using the **Move Selected Field Up** and **Move Selected Field Down** buttons.



8. Click **OK**. Your field configuration is saved.

Assign Integration Link

Integration Links Overview

Optionally assign an **Integration Link** to help workers process work items by taking them to a related form, application, or URL when they are processing work in the task. When an integration link is configured on a user task, it is indicated by an icon representing the type of integration link.

There integration link types are as follows:

- **Forms iQ:** The specified Feith Forms iQ form opens and the user fills out the form as needed for that work item.
- **Application:** The specified application opens and the user performs the needed actions in the application for that work item.
- **URL:** The specified URL opens and the user performs the needed actions on the web page for that work item.

See Assign Integration Link for more information on assigning an integration link to a user task. See Create and Maintain Integration Links for more information on creating and maintaining integration links.

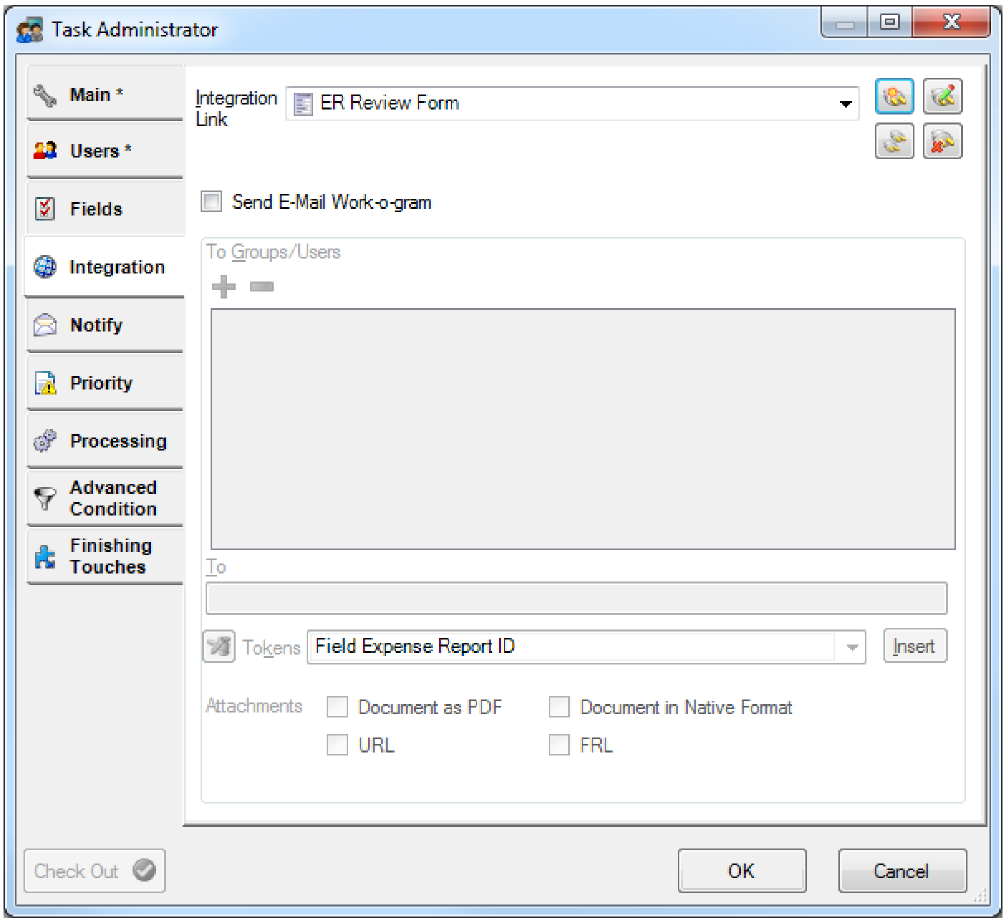
Assign Integration Link

Optionally assign an **Integration Link** to help workers process work items by taking them to a related form, application, or URL when they are processing work in the task.

See Integration Links Overview for more general information on integration links and their types. See Create and Maintain Integration Links for more information on creating and maintaining integration links.

To assign an integration link to a user task:

1. Double-click the user task. The **Task Administrator** opens.
2. On the **Integration** tab, select the desired **Integration Link**. If needed, you may **Create an Integration Link** (see Create and Maintain Integration Links for more information).



3. Click **OK**. Your integration link assignment is saved. The integration link is indicated as assigned to the task by an icon representing the integration link type, including Forms iQ, Application, or URL.

To remove an integration link from a user task:

a. Double-click the user task. The **Task Administrator** opens.
b. On the **Integration** tab, in the **Integration Link** field select **<None>**.
c. Click **OK**. Your changes are saved.

Create and Maintain Integration Links

Create and maintain integration links which may be optionally assigned to a user task in order to help workers process work items by taking them to a related form, application, or URL when they are processing work in the task.

See Assign Integration Link for more information on assigning an integration link to a user task.

See the following sections for instructions:

- Create Integration Link
- Modify Integration Link
- Clone Integration Link
- Delete Integration Link

Note: Integration links can also be created and maintained in the **Integration Link Administrator** under the **Tools** menu.

Create Integration Link

To create an integration link:

1. Select **Tools>Integration Link Administrator**. The **Integration Link Administrator** opens.

   You can also create an integration link from inside a task in the **Task Administrator** on the **Integration** tab.

2. Click **Create Integration Link** . The **Create Integration Link** dialog opens.

   Alternatively, you may **Clone** an existing integration link. See Clone Integration Link for more information.

3. Choose the desired link type and configure it as needed:

   - **Forms iQ:** The specified Feith Forms iQ form opens and the user fills out the form as needed for that work item.
   - **Application:** The specified application opens and the user performs the needed actions in the application for that work item.
   - **URL:** The specified URL opens and the user performs the needed actions on the web page for that work item.

4. Click **OK**. The integration link is created. See Assign Integration Link for more information on assigning an integration link to a user task.

Modify Integration Link

To modify an integration link:

1. Select **Tools>Integration Link Administrator**. The **Integration Link Administrator** opens.

   You can also modify an integration link from inside a task in the **Task Administrator** on the **Integration** tab.

2. Select the desired integration link and click **Modify Integration Link** . The **Modify Integration Link** dialog opens.
3. Modify the integration link as needed according to its type, including Forms iQ, Application, or URL.
4. Click **OK**. The integration link is modified.

Clone Integration Link

To clone an integration link:

1. Select **Tools>Integration Link Administrator**. The **Integration Link Administrator** opens.

   You can also clone an integration link from inside a task in the **Task Administrator** on the **Integration** tab.

2. Select the desired integration link and click **Clone Integration Link** . The **Clone Integration Link** dialog opens.
3. Modify the clone integration link as needed according to its type, including Forms iQ, Application, or URL.
4. Click **OK**. The integration link is created.

Delete Integration Link

To delete an integration link:

1. Select **Tools>Integration Link Administrator**. The **Integration Link Administrator** opens.

   You can also delete an integration link from inside a task in the **Task Administrator** on the **Integration** tab.

2. Select the desired integration link and click **Delete Integration Link** . A prompt opens to confirm the delete.
3. Click **Yes** to proceed with the delete. The integration link is deleted.

   Note: An integration link assigned to a task cannot be deleted.

Forms iQ Links

Use a **Forms iQ** integration link which may be optionally assigned to a user task in order to help workers process work items by taking them to a related form that they fill out as needed for that work item. When the user is done filling out the form, they submit the form and the work item is marked as done and moves on to the next step in the workflow.

See Assign Integration Link for more information on assigning an integration link to a user task. See Create and Maintain Integration Links for more information on creating and maintaining integration links.

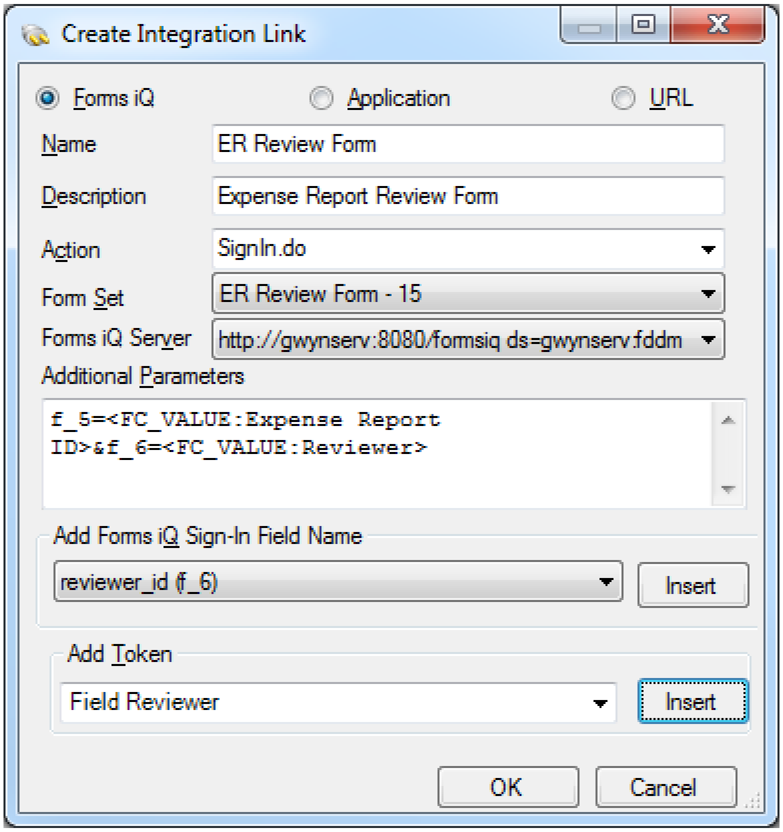
Notes:

- When working in a user task with a Forms iQ link, the index values of the workflow document cannot be modified. The file cabinet fields are disabled in the client interface (FDD or WebFDD).
- Manual routes are not supported as output routes for user tasks with Forms iQ links.

To configure a Forms iQ integration link:

1. Choose **Forms iQ** as the link type.
2. Enter the link **Name**.
3. Optionally enter a **Description**.
4. Select the form **Action**:
    - **form.do:** Opens a new, blank form.
    - **SignIn.do:** Signs into and opens a new, blank form using the provided sign-in parameters. For example, the sign-in values may be used to autofill values on the form. The specified **Form Set** must have a "Sign In Page".
    - **ShowLiveForm.do:** Opens the existing form in the task. Select **<Any Workflowed Form>** to have the integration link open any form in the task. If you do not want to open any form in the task, specify a **Form Set** to only open forms of that form set (forms from other form sets will not be opened by the integration link).
5. Select the **Form Set**, identifying the form you want to launch for the worker:
    - You *must* select a form set for an **Action** of **form.do** or **SignIn.do**.
    - Selecting a form set for an **Action** of **ShowLiveForm.do** is optional. Select **<Any Workflowed Form>** to have the integration link open any form in the task. If you do not want to open any form in the task, specify a **Form Set** to only open forms of that form set (forms from other form sets will not be opened by the integration link).
6. Select the **Forms iQ Server** to be used for submitting new forms for an **Action** of **form.do** or **SignIn.do**. The Forms iQ Server is not specified for an **Action** of **ShowLiveForm.do**.
7. If an **Action** of **SignIn.do** is selected, specify the sign-in parameters in the **Additional Parameters** field. You may use the **Add Forms iQ Sign-In Field Name** and **Add Token** lists to **Insert** form field names and tokens in order to help you build your parameters. See Appendix A: Tokens for more information.

For example, the additional parameter **f_5=<FC_VALUE:Expense Report ID>** would sign into the form by entering the work item's value for file cabinet field **Expense Report ID** into form field **f_5**, and values may be autofilled in the form based on that **Expense Report ID** (depending on the form's configuration).



Application Links

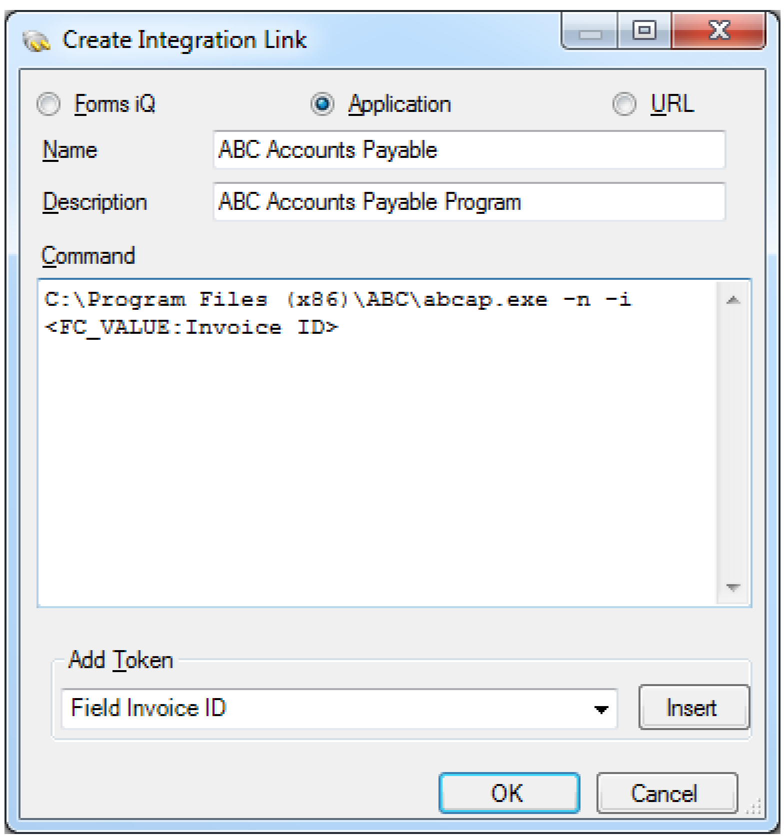
Use an **Application** link which may be optionally assigned to a user task in order to help workers process work items by taking them to a related application where they perform the needed actions in the application for that work item.

See Assign Integration Link for more information on assigning an integration link to a user task. See Create and Maintain Integration Links for more information on creating and maintaining integration links.

Note: When working in a user task with an application link, the user will need to exit the application before returning to FDD and processing the work item.

To configure an Application integration link:

1. Choose **Application** as the link type.
2. Enter the link **Name**.
3. Optionally enter a **Description**.
4. Enter the application **Command**. The path to the application should point to where it is installed on the user's local machine. You may use the **Add Token** list to **Insert** tokens into the command. See Appendix A: Tokens for more information.



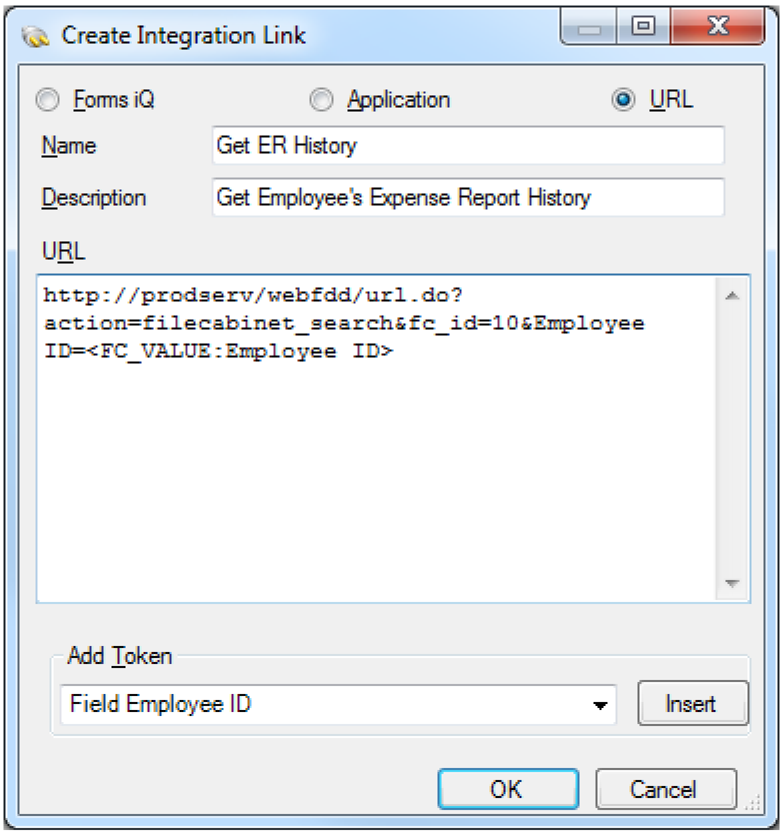
URL Links

Use a **URL** link which may be optionally assigned to a user task in order to help workers process work items by taking them to a related URL where they perform the needed actions on the web page for that work item.

See Assign Integration Link for more information on assigning an integration link to a user task. See Create and Maintain Integration Links for more information on creating and maintaining integration links.

To configure a URL integration link:

1. Choose **URL** as the link type.
2. Enter the link **Name**.
3. Optionally enter a **Description**.
4. Enter the **URL**. You may use the **Add Token** list to **Insert** tokens into the URL. See Appendix A: Tokens for more information.



Configure Work-o-gram

Optionally configure a **Work-o-gram** in order to enable workers to process work in a task by email. The work-o-gram email includes the work item's index values and provides the recipient with the ability to "done" the work item by responding to the email, selecting manual routes and adding document notes if desired or applicable. Note that the work-o-gram text is not configurable. When a work-o-gram is configured on a user task, it is indicated by a mail icon . (Note that a mail icon could also indicate that there is a notification on the task. See Notify for more information.)

Work-o-grams are processed by the **Feith Work-o-gram Portal**.

To configure a work-o-gram on a user task:

1. Double-click the user task. The **Task Administrator** opens.
2. On the **Integration** tab, check on **Send E-Mail Work-o-gram**. The work-o-gram options are enabled.
3. Click **Show All Selectable Groups and Users** . All workflow users and groups with members that are workflow users are displayed in the list.
4. Check the desired groups and users.

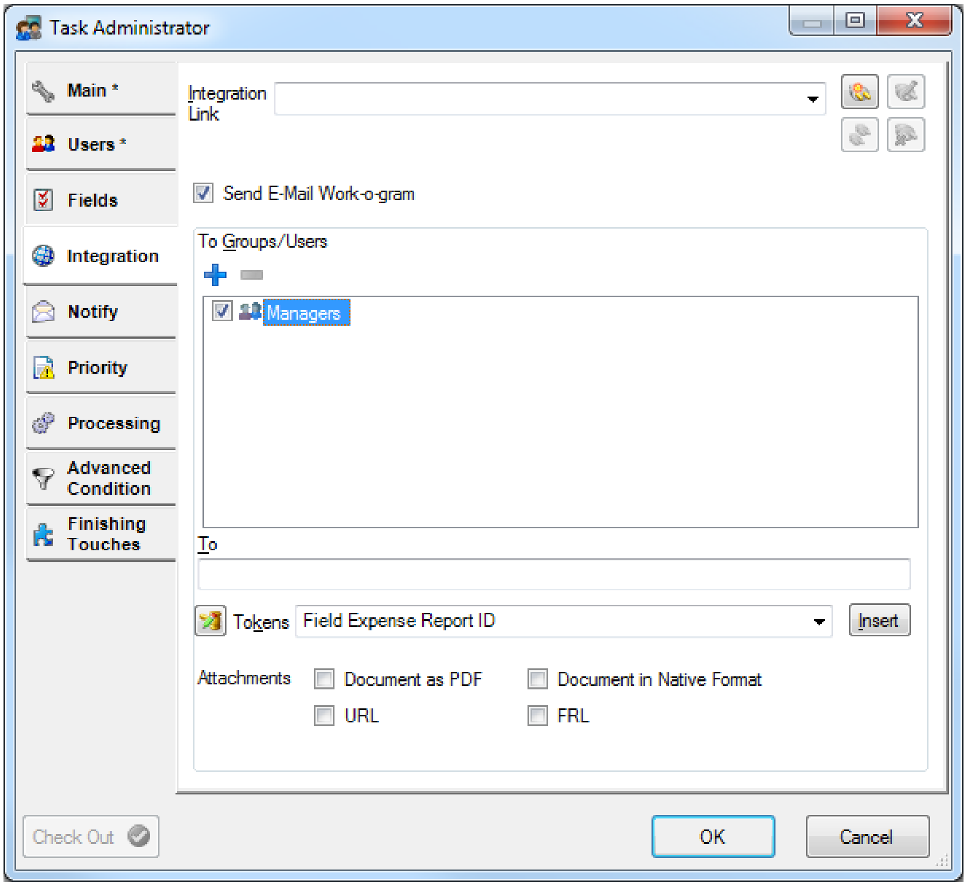
   Tip: In the group/user list hit the key of the first letter of the group/user name to jump to that part of the list. Hit the letter key multiple times to cycle through all groups/users that start with that letter. Also, use the up and down arrow keys to navigate in the group/user list.
5. Optionally enter additional recipients in the **To** field. When entering multiple email addresses, separate each value with a semicolon **;**. You may use the **Token** list to **Insert** tokens into the **To** field. See Appendix A: Tokens for more information.

   For example, **jsmith@abc.com;{FC_VALUE|mgr_email};jdoe@abcinc.com;{RULE|7}**

   Tip: If the desired email addresses are stored in a location in the database other than the file cabinet, you may create a **Rule Token** and write custom SQL (Structured Query Language) to retrieve those email addresses. See Rule Tokens for more information.
6. Optionally select one or more **Attachments** to include in the work-o-gram email.
   - **Document as PDF:** The work item in PDF format.

     Note: PDF files cannot be created for FDD GOS pages or Forms iQ pages.
   - **Document in Native Format:** The work item in its native format.
   - **URL:** A WebFDD link to the work item. The recipient may click the URL to launch WebFDD and login to view the work item.
   - **FRL:** A FDD URL to the work item. The recipient may click on the .frl to launch FDD Client and login to view the work item.

     Note: FDD must be installed on the recipient's computer.



7. Click **OK**. Your work-o-gram configuration is saved.

Set Advanced Condition

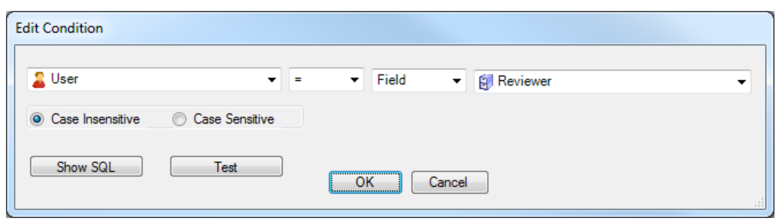
Optionally set an **Advanced Condition** to restrict which work items are available to which users. For example, an advanced condition may restrict a user to only access work items where their FDD user name is in the work item's index values.

To set an advanced condition on a user task:

1. Double-click the user task. The **Task Administrator** opens.
2. On the **Advanced Condition** tab, **Create** a "constructed" condition or write the **SQL** yourself:
   - Create a "constructed" condition:
     1. Click **Create**. The **Edit Condition** dialog opens.
     2. Select the desired field or system value
     3. Select the desired operator. Operators include equal to **=**, not equal to **<>**, less than **<**, less than or equal to **<=**, greater than **>**, greater than or equal to **>=**, **IS** (NULL or NOT NULL), **IN** (SQL), **NOT IN** (SQL).
     4. Select whether you want to compare a **Value**, **Field**, **Function**, or **SQL**.
     5. If you selected to compare a **Value** or **SQL**, enter the value or SQL. If the field has a lookup table, you can select a value from the lookup values. If you selected to compare a **Field** or **Function**, select the field or function.
     6. Choose whether to check the value in a **Case Insensitive** or **Case Sensitive** manner.

        Tips:

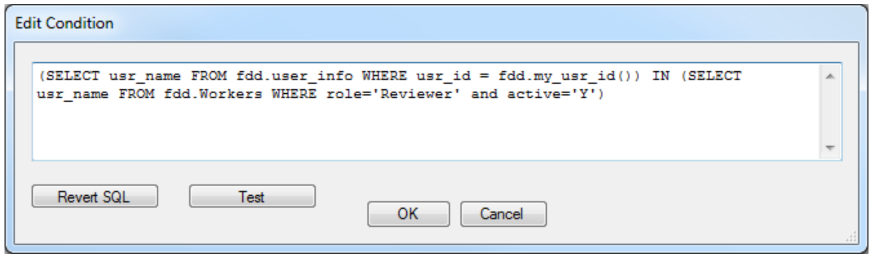
        - Click **Test** to see if your condition works.
        - Click **Show SQL** to switch to the SQL view. Note that if you make changes in the SQL view, you cannot go back to the "constructed" condition unless you revert the SQL.

     7. Click **OK**. The condition is added.
     8. Optionally add more conditions by clicking **And** or **Or**. You can add more criteria to an **and** or **or** statement by selecting **and** or **or** and clicking **Add**.

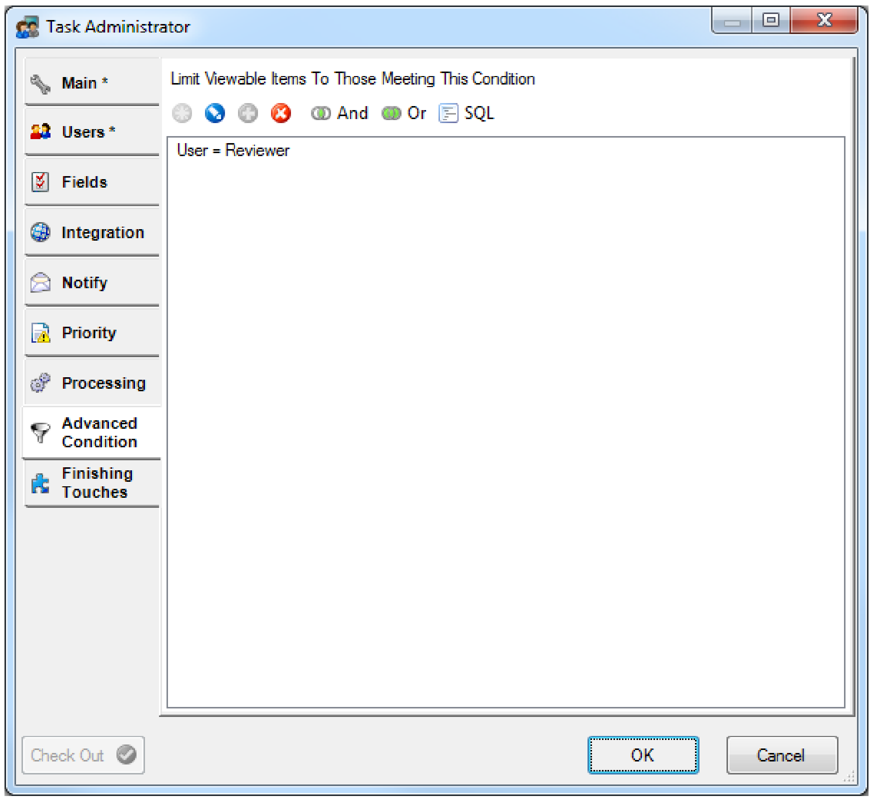
        You can change an existing **and** to and **or**, or vice versa, by double-clicking the **and** or **or** and changing it to the desired operator in the **And or Or** dialog.

        Modify or **Delete** conditions as needed.
   - Enter a SQL condition:
     1. Click **SQL**. The **Edit Condition** dialog opens.
     2. Enter a SQL condition.



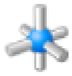
Note: The table referenced in the above SQL is not in the standard Feith FDD Schema but is used only for the purpose of this example.

3. Click **OK**. The condition is added.



3. Click **OK**. Your advanced condition is saved.

Hub Task

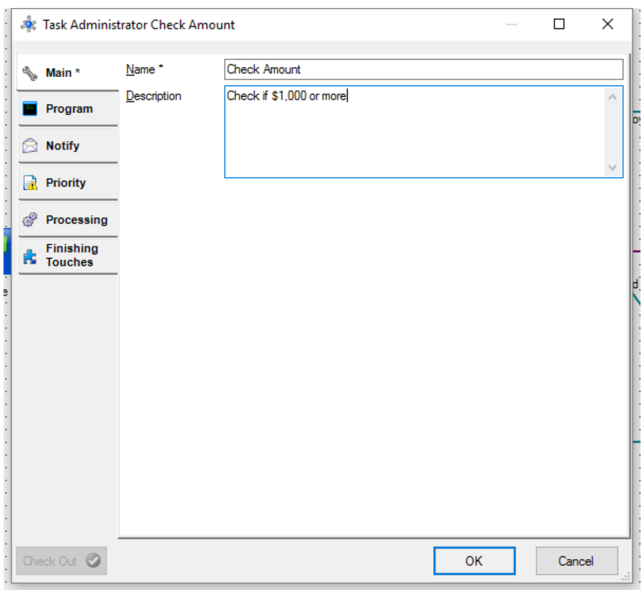
A **Hub Task**  is an intersection in the workflow. Hub tasks can also be used to run an automated program. For example, an intersection may be used to conditionally route work items to other tasks or a program may run to export the work item's pages.

To add a hub task:

1. Select the **Hub** task tool in the administrator toolbar.
2. Click on the workflow map. The task is added.
3. Double-click the hub task. The **Task Administrator** opens.

   Tip: As soon as the **Task Administrator** opens, you can take advantage of one of the following keyboard shortcuts:

   - Hit the **TAB** key once to quickly move to the **Name** field. This may be helpful when first adding tasks, especially if you are adding many tasks.
   - Use the up and down arrow keys to navigate to the desired tab.
4. On the **Main** tab:
   a. Enter the task **Name**. The name may be up to 64 characters long.
   b. Optionally enter a **Description**. The description may be up to 80 characters long.



5. Optionally configure a **Program** to run for a work item when it enters the task. See [Configure Program] for more information.
6. Optionally **Notify** workers or other parties by email. See [Notify] for more information.
7. Optionally change the work item's **Priority**. See [Priority] for more information.
8. Optionally specify how many work items Rex should be **Processing** in the task in a given cycle. See [Processing] for more information.
9. Optionally assign **Finishing Touches** to run custom SQL when a work item leaves the task. See [Finishing Touches] for more information.
10. Click **OK**. The task is configured. The dashed outline is removed, indicating the task is complete.

Configure Program

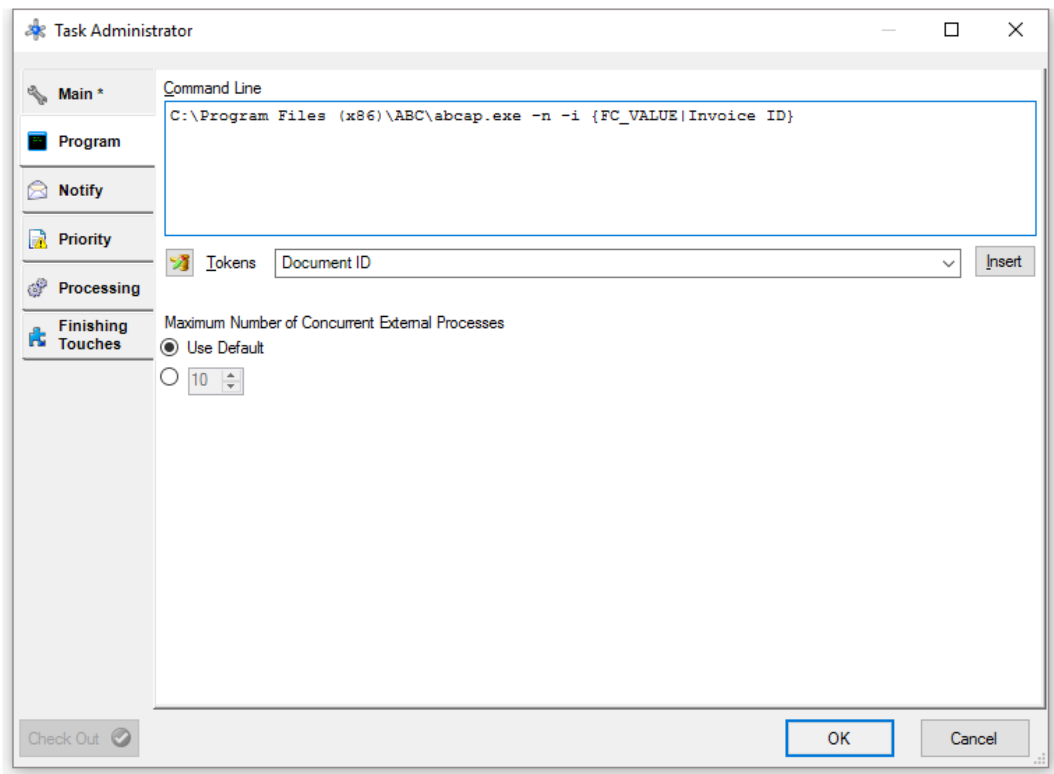
Optionally configure a **Program** to run for a work item when it enters the task. For example, a program may run to export the work item's pages. Rex starts and runs the program for every work item that enters the task and waits for the program to successfully exit before sending the work item on to the next step in the workflow. When a program is configured on a hub task, it is indicated by a command window icon .

To configure a program on a hub task:

1. Double-click the user task. The **Task Administrator** opens.
2. On the **Program** tab, enter the **Command Line** you want to run on the work items. You may use the **Token** list to **Insert** tokens into the **Command Line**. See Appendix A: Tokens for more information.

   Tip: If a desired value for the **Command Line** is stored in a location in the database other than the file cabinet, you may create a **Rule Token** and write custom SQL (Structured Query Language) to retrieve that value. See Rule Tokens for more information.
3. Optionally specify the **Maximum Number of Concurrent External Processes**. For an important hub task you would have a higher number; for an unimportant hub task you would have a lower number. For example, if you have an unimportant hub task with a lot of documents, you could lower the hub task down to **2** concurrent processes. That way, the task is only working up to two documents at a time and doesn't take Rex's attention away from more important work.

   Note: Rex has a global limit of concurrent external processes, which applies to all hub tasks, set in its initialization file. See Rex Manual for more information.



4. Click **OK**. Your program configuration is saved.

Rendezvous Task

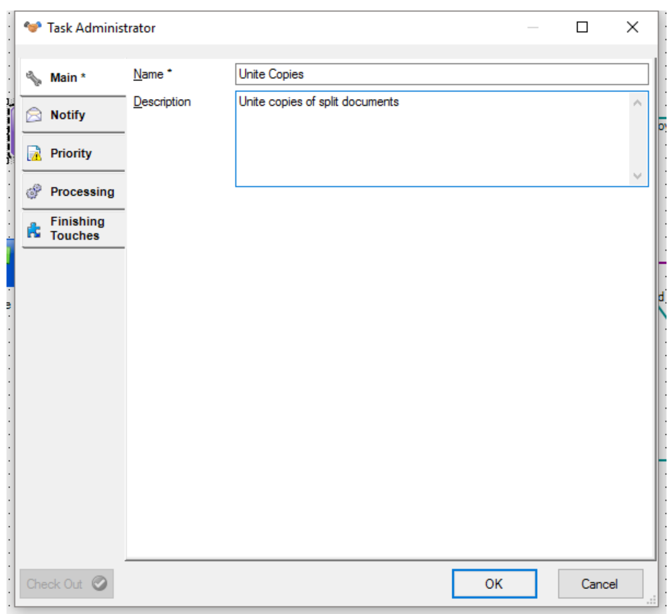
A **Rendezvous Task**  collects and combines copies of a work item, such as when the work item was split across multiple paths earlier in the workflow. When a work item arrives at a rendezvous task, it waits until all its other copies in previous tasks in the workflow arrive at the rendezvous task. When all copies arrive at the rendezvous task, the work item moves on to the next step in the workflow.

To add a rendezvous task:

1. Select the **Rendezvous** task tool in the administrator toolbar.
2. Click on the workflow map. The task is added.
3. Double-click the rendezvous task. The **Task Administrator** opens.

   Tip: As soon as the **Task Administrator** opens, you can take advantage of one of the following keyboard shortcuts:

   - Hit the **TAB** key once to quickly move to the **Name** field. This may be helpful when first adding tasks, especially if you are adding many tasks.
   - Use the up and down arrow keys to navigate to the desired tab.
4. On the **Main** tab:
   a. Enter the task **Name**. The name may be up to 64 characters long.
   b. Optionally enter a **Description**. The description may be up to 80 characters long.



5. Optionally **Notify** workers or other parties by email. See Notify for more information.
6. Optionally change the work item's **Priority**. See Priority for more information.
7. Optionally specify how many work items Rex should be **Processing** in the task in a given cycle. See Processing for more information.
8. Optionally assign **Finishing Touches** to run custom SQL when a work item leaves the task. See Finishing Touches for more information.
9. Click **OK**. The task is configured. The dashed outline is removed, indicating the task is complete.

Wait-For Task

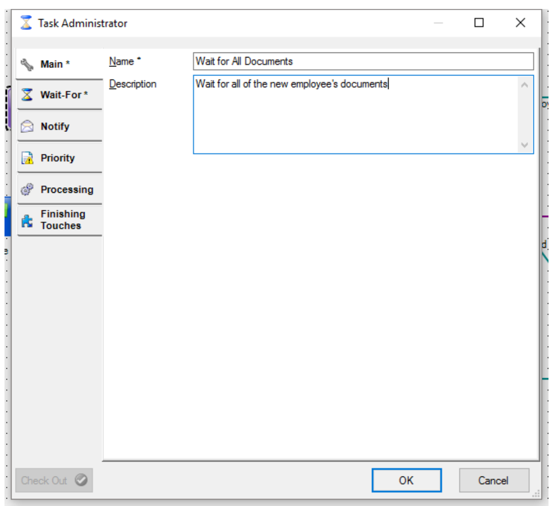
A **Wait-For Task**  waits for one or more specified conditions to be true for a given work item. For example, a work item may wait until another needed document exists in order to move forward in the process. A work item must meet all conditions in order to move on to the next step in the workflow. You may view the conditions a given work item meets or does not meet by right-clicking the wait-for task and selecting **Wait-For Status**. See Wait-For Status for more information.

To add a wait-for task:

1. Select the **Wait-For** task tool in the administrator toolbar.
2. Click on the workflow map. The task is added.
3. Double-click the wait-for task. The **Task Administrator** opens.

   Tip: As soon as the **Task Administrator** opens, you can take advantage of one of the following keyboard shortcuts:

   - Hit the **TAB** key once to quickly move to the **Name** field. This may be helpful when first adding tasks, especially if you are adding many tasks.
   - Use the up and down arrow keys to navigate to the desired tab.
4. On the **Main** tab:
   a. Enter the task **Name**. The name may be up to 64 characters long.
   b. Optionally enter a **Description**. The description may be up to 80 characters long.



5. Set one or more **Wait-For** rules that a work item must meet in order to move on to the next step in the workflow. You can set up **Expected Documents** rules or **Wait-For Condition** rules. See Set Expected Documents or Set Wait-For Condition for more information.
6. Optionally **Notify** workers or other parties by email. See Notify for more information.
7. Optionally change the work item's **Priority**. See Priority for more information.
8. Optionally specify how many work items Rex should be **Processing** in the task in a given cycle. See Processing for more information.
9. Optionally assign **Finishing Touches** to run custom SQL when a work item leaves the task. See Finishing Touches for more information.
10. Click **OK**. The task is configured. The dashed outline is removed, indicating the task is complete.

Set Expected Documents

Set one or more **Expected Documents** rules that a work item must meet in order to move on to the next step in the workflow. Expected Documents rules check for the existence of a document in any file cabinet.

Note: The following file cabinet field types are not available in the **This File Cabinet Key Field**, **Join File Cabinet Field**, or **Document Type Field** lists: Signatures, List of Strings, List of Numbers, and List of Dates.

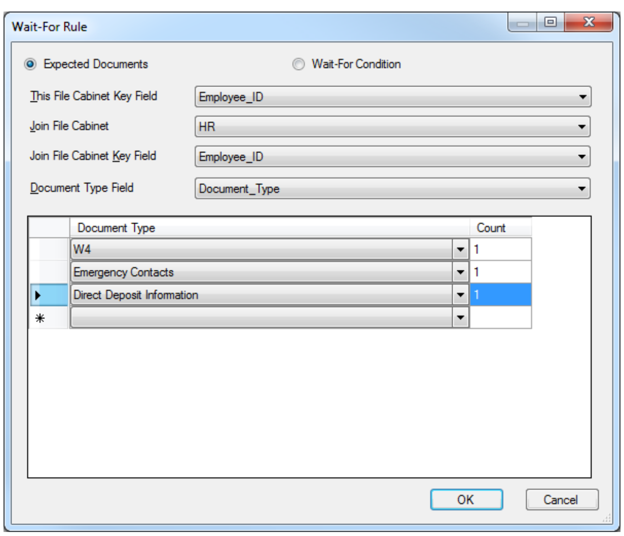
See the following sections for instructions:

- Create Expected Documents Rule
- Modify Expected Documents Rule
- Delete Expected Documents Rule

Create Expected Documents Rule

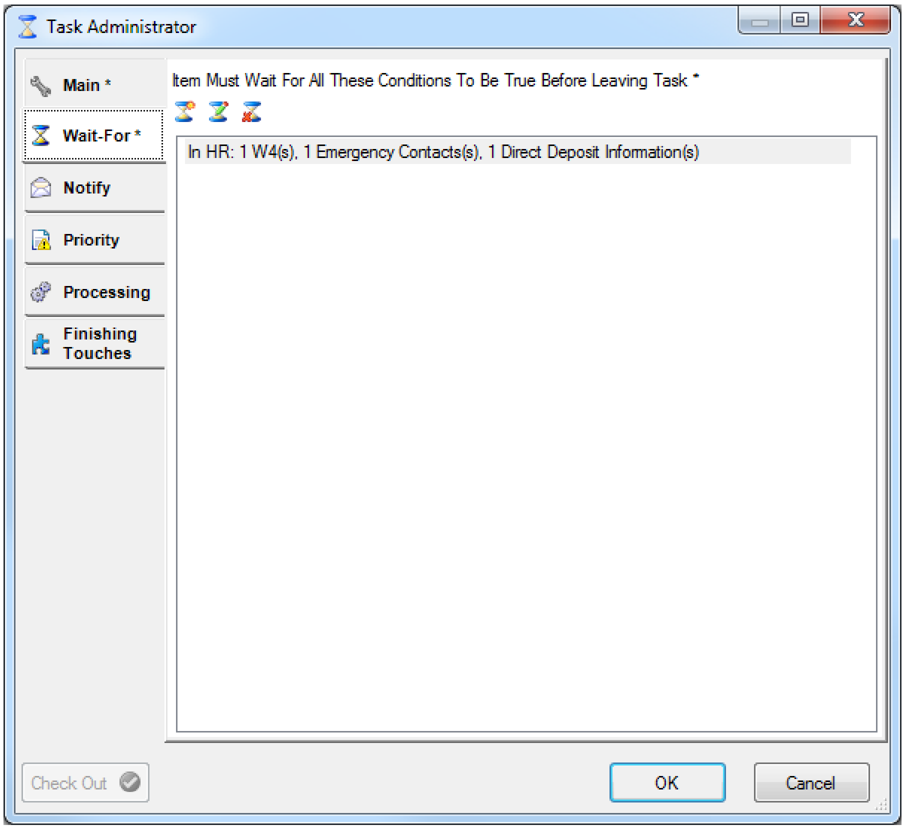
To create an expected documents rule:

1. Double-click the wait-for task. The **Task Administrator** opens.
2. On the **Wait-For** tab, click **Create Wait-For Rule**. The **Wait-For Rule** dialog opens and the **Expected Documents** screen displays.
3. Select **This File Cabinet Key Field** whose value will be used for comparison in the other file cabinet.
4. Select the **Join File Cabinet** where you are looking for the expected documents.
5. Select the **Join File Cabinet Key Field** whose value is compared to the value from the **This File Cabinet Key Field**.
6. Select the **Document Type Field** of the file cabinet that contains the document type of the expected documents.
7. In the **Document Type** list, enter one or more document types you are looking for and the **Count** of how many of each must exist to satisfy the rule:
    a. You can click in the **Document Type** field and start typing or, if the **Document Type Field** has a lookup table, you can select a document type value from the lookup values.
    b. Hit the **TAB** key or click in the **Count** column. The **Document Type** is added. If needed, change the **Count** from the default of **1** to the desired value.



To delete a **Document Type**, right-click a row and select **Delete Rows**. You can select multiple rows to delete using **CTRL+click** or **SHIFT+click**.

8. Click **OK**. Your expected documents rule is created. You may optionally add more wait-for rules, whether expected documents rules or wait-for condition rules (see [Set Wait-For Conditions] for more information). Note if you specify more than one wait-for rule, a work item must meet all the rules to move on.



Modify Expected Documents Rule

To modify an expected documents rule:

1. Double-click the wait-for task. The **Task Administrator** opens.
2. On the **Wait-For** tab, select the desired expected documents rule and click **Modify Wait-For Rule**. The **Wait-For Rule** dialog opens.
3. Modify the expected documents rule as desired.
4. Click **OK**. The expected documents rule is modified.

Delete Expected Documents Rule

To delete an expected documents rule:

1. Double-click the wait-for task. The **Task Administrator** opens.
2. On the **Wait-For** tab, select the desired expected documents rule and click **Delete Wait-For Rule**. The expected documents rule is deleted.

Set Wait-For Condition

Set one or more **Wait-For Condition** rules that a work item must meet in order to move on to the next step in the workflow. Wait-for Conditions check for a value in the file cabinet for **This Work Item** or elsewhere in the database in an **External Table**.

See the following sections for instructions:

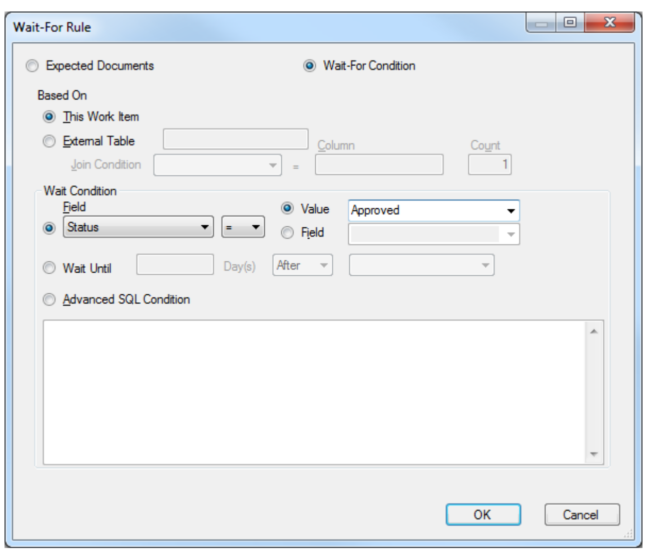
- Create Wait-For Condition Based on This Work Item
- Create Wait-For Condition Based on an External Table
- Modify Wait-For Condition
- Delete Wait-For Condition

Tip: Double-click a wait-for rule while the workflow is checked in to view (not modify) the condition.

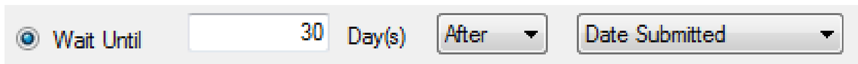
Create Wait-For Condition Based On This Work Item

To create a wait-for condition based on a value in the file cabinet for this work item:

1. Double-click the wait-for task. The **Task Administrator** opens.
2. On the **Wait-For** tab, click **Create Wait-For Rule** . The **Wait-For Rule** dialog opens.
3. Select **Wait-For Condition**. The **Wait-For Condition** screen displays.
4. Indicate that the condition is **Based On** a value in the file cabinet for **This Work Item**.
5. Specify and configure the desired **Wait Condition**:
    - To compare a file cabinet **Field** value to an expected value:
        a. Choose **Field** as the **Wait Condition**.
        b. Select the file cabinet **Field** for the comparison.
        c. Select the desired operator. Operators include equal to **=**, not equal to **<>**, less than **<**, less than or equal to **<=**, greater than **>**, greater than or equal to **>=**, **IS** (NULL or NOT NULL).
        d. Select whether you want to compare a **Value** or a **Field**.
        e. If you selected to compare a **Value**, enter the value. If the field has a lookup table, you can select a value from the lookup values. If you selected to compare a **Field**, select the file cabinet field or enter a system value (e.g. **SYSDATE** on Oracle or **getdate()** on MS SQL Server).

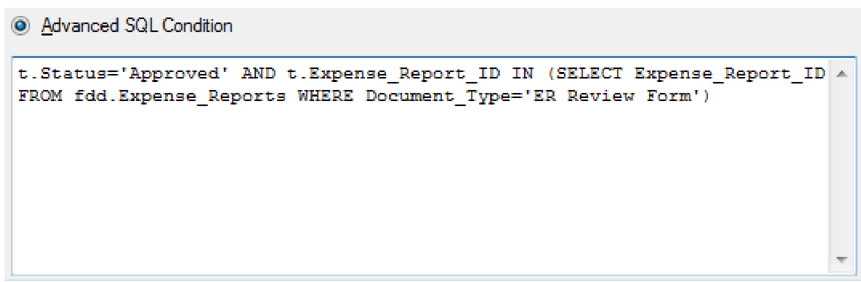


- To **Wait Until** a specified time referencing a file cabinet field:
    a. Choose **Wait Until** as the **Wait Condition**.
    b. Enter the number of **Day(s)** to wait.
    c. Select whether to wait **After** or **Before** the date to be specified.
    d. Select the file cabinet field containing the date value you want to reference.



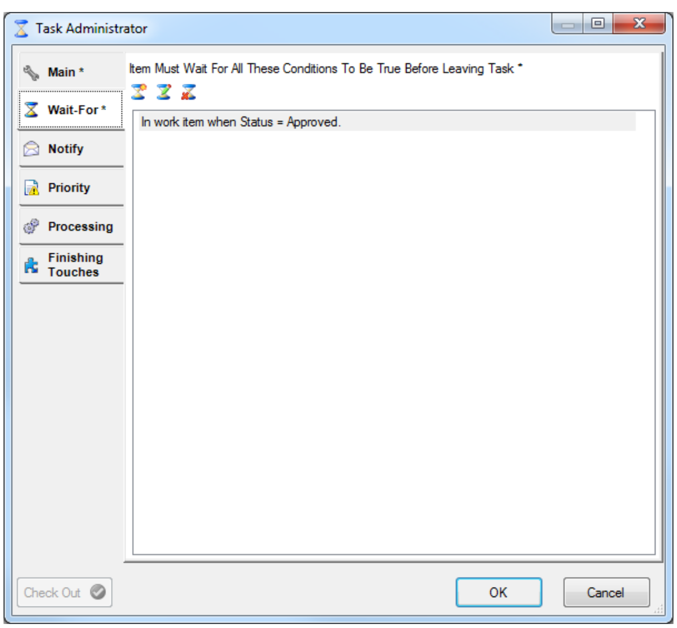
- To set an **Advanced SQL Condition** using the file cabinet fields:
    a. Choose **Advanced SQL Condition** as the **Wait Condition**.
    b. Enter the desired SQL using the file cabinet fields.

    Tip: To avoid a potential conflict with a file cabinet field column name, put the alias "t." in front of the file cabinet field column name. For example **t.work_status='pending'**.



Note: The table referenced in the above SQL is not in the standard Feith FDD Schema but is used only for the purpose of this example.

6. Click **OK**. Your wait-for condition is created. You may optionally add more wait-for rules, whether wait-for condition rules or expected documents rules (see Set Expected Documents for more information). Note if you specify more than one wait-for rule, a work item must meet all the rules to move on.

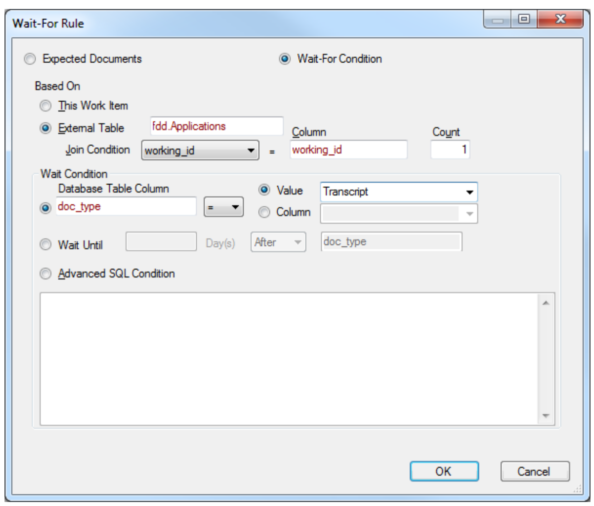


Create Wait-For Condition Based On an External Table

To create a wait-for condition based on a value in an external table:

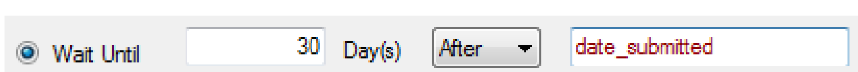
1. Double-click the wait-for task. The **Task Administrator** opens.
2. On the **Wait-For** tab, click **Create Wait-For Rule** . The **Wait-For Rule** dialog opens.
3. Select **Wait-For Condition**. The **Wait-For Condition** screen displays.
4. Indicate that the condition is **Based On** a value in an **External Table** and enter the table name.
5. Specify the **Join Condition**, selecting a field in the file cabinet or the system **{DOC_ID}** and entering the **Column** it matches in the external table.
6. Indicate the **Count** of rows you want the work item to wait for in the external table (that meet the **Join Condition** and **Wait Condition**).
7. Specify and configure the desired **Wait Condition**:

   - To compare a **Database Table Column** value to an expected value:
     a. Choose **Database Table Column** as the **Wait Condition**.
     b. Enter the table column for the comparison.
     c. Select the desired operator. Operators include equal to **=**, not equal to **<>**, less than **<**, less than or equal to **<=**, greater than **>**, greater than or equal to **>=**, **IS** (NULL or NOT NULL).
     d. Select whether you want to compare a **Value** or a **Column**.
     e. If you selected to compare a **Value**, enter the value. If you selected to compare a **Column**, enter the table column or a system value (e.g. **SYSDATE** on Oracle or **getdate()** on MS SQL Server).



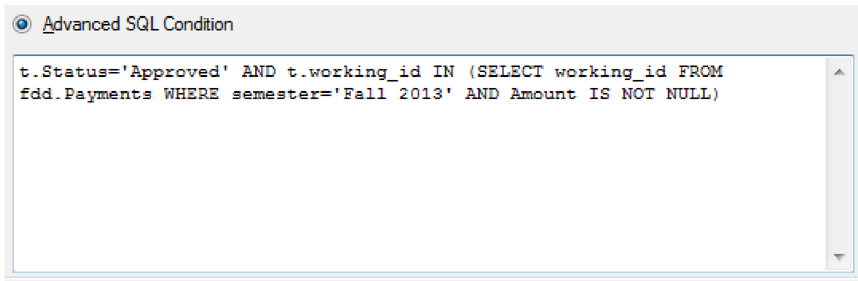
Note: The table referenced above is not in the standard Feith FDD Schema but is used only for the purpose of this example.

   - To **Wait Until** a specified time referencing a table column:
     a. Choose **Wait Until** as the **Wait Condition**.
     b. Enter the number of **Day(s)** to wait.
     c. Select whether to wait **After** or **Before** the date to be specified.
     d. Enter the table column containing the date value you want to reference.



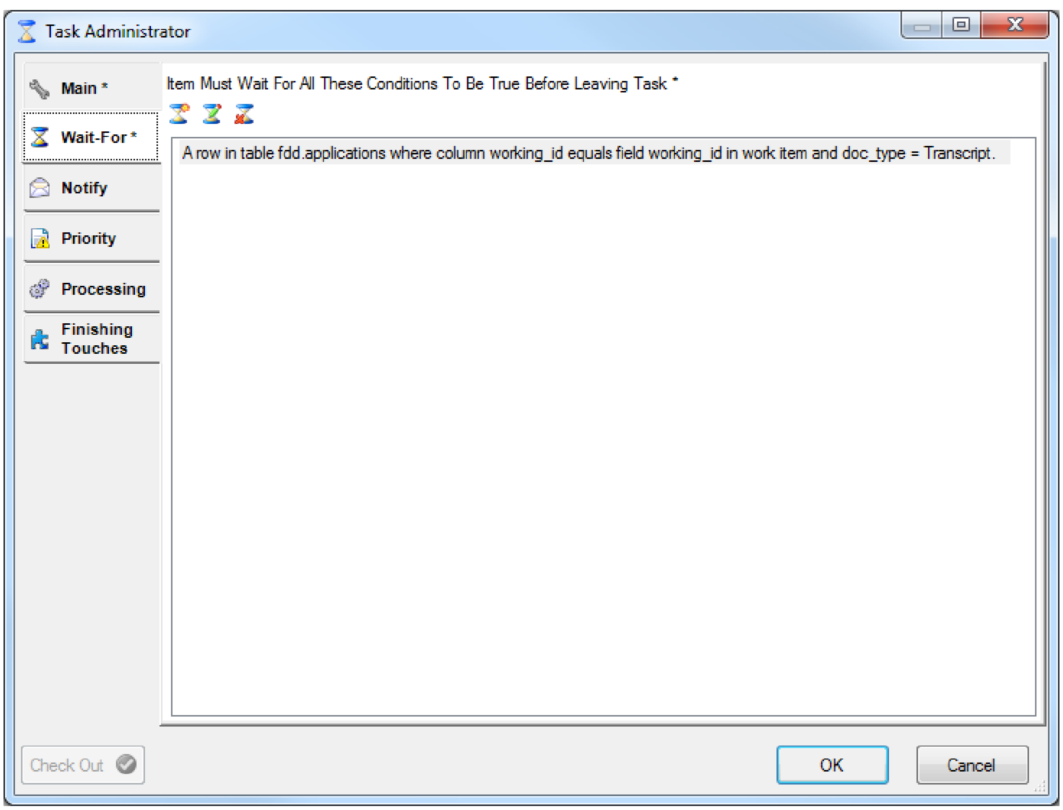
- To set an **Advanced SQL Condition** using the table columns:
    a. Choose **Advanced SQL Condition** as the **Wait Condition**.
    b. Enter the desired SQL using the table columns.

    Tip: To avoid a potential conflict with an external table column name, put the alias "t." in front of the external table column name. For example **t.work_status='pending'**.
    To avoid a potential conflict with a file cabinet field column name, which you can also use inside an **Advanced SQL Condition** based on an external table, put the alias "f." in front of the file cabinet field column name. For example **f.work_status='pending'**.



Note: The table referenced in the above SQL is not in the standard Feith FDD Schema but is used only for the purpose of this example.

8. Click **OK**. Your wait-for condition is created. You may optionally add more wait-for rules, whether wait-for condition rules or expected documents rules (see Set Expected Documents for more information). Note if you specify more than one wait-for rule, a work item must meet all the rules to move on.



Modify Wait-For Condition

To modify a wait-for condition:

1. Double-click the wait-for task. The **Task Administrator** opens.
2. On the **Wait-For** tab, select the desired wait-for condition rule and click **Modify Wait-For Rule** . The **Wait-For Rule** dialog opens.
3. Modify the wait-for condition as desired.
4. Click **OK**. The wait-for condition is modified.

Delete Wait-For Condition

To delete a wait-for condition:

1. Double-click the wait-for task. The **Task Administrator** opens.
2. On the **Wait-For** tab, select the desired wait-for condition rule and click **Delete Wait-For Rule** . The wait-for condition is deleted.

Subflow Task

A **Subflow Task**  routes a work item to another workflow, which will be processed there until it returns back "up" to the "parent" workflow. When a work item reaches an end task in the subflow, it is removed from the subflow and moves on in the parent workflow to the next step after the subflow task.

Notes:

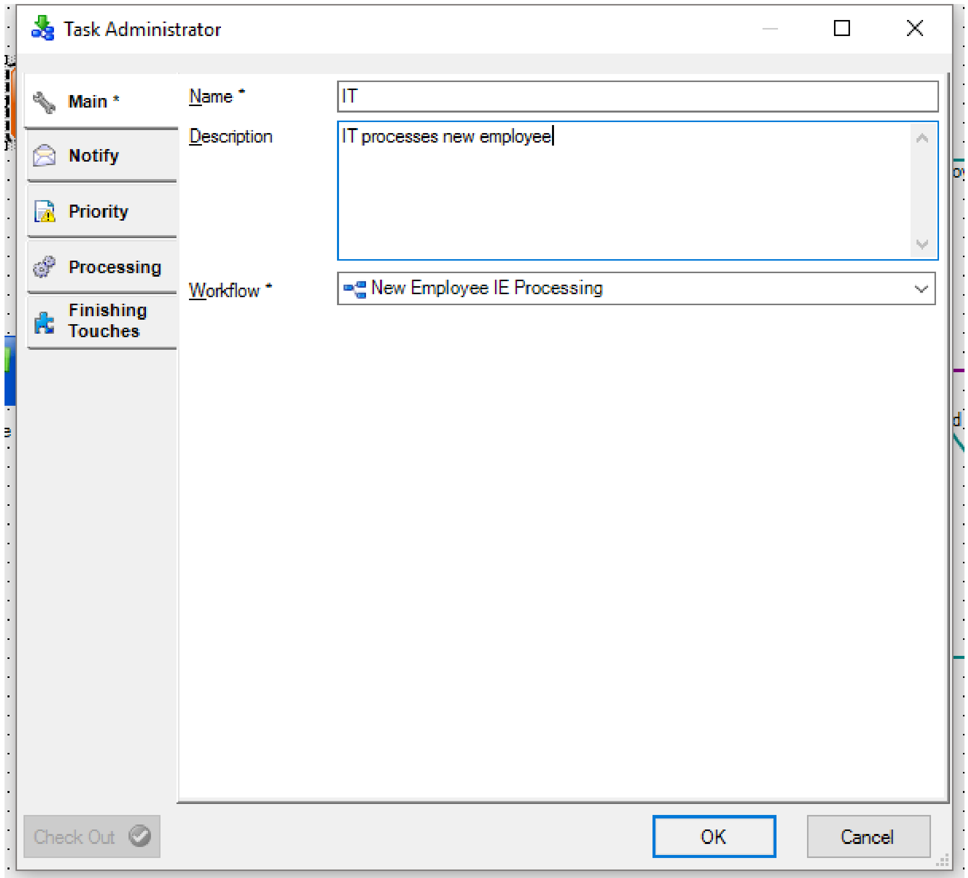
- When designing a workflow to be used as a subflow, the start task condition should be set to **Manual Insertion or Subflow Only**. This prevents work items from be added directly to the subflow from either an insert or polled start condition. See Set Start Condition for more information.
- When designing a workflow to be used as a subflow, start task permissions should generally not be granted to any users or groups. This will prevent users from having permission to manually add items to the subflow. See Assign Users to Start Task for more information.

To add a subflow task:

1. Select the **Subflow** task tool in the administrator toolbar.
2. Click on the workflow map. The task is added.
3. Double-click the subflow task. The **Task Administrator** opens.

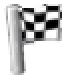
   Tip: As soon as the **Task Administrator** opens, you can take advantage of one of the following keyboard shortcuts:

   - Hit the **TAB** key once to quickly move to the **Name** field. This may be helpful when first adding tasks, especially if you are adding many tasks.
   - Use the up and down arrow keys to navigate to the desired tab.
4. On the **Main** tab:
   a. Enter the task **Name**. The name may be up to 64 characters long.
   b. Optionally enter a **Description**. The description may be up to 80 characters long.
   c. Select the **Workflow** to be used as a subflow. The list includes all workflows built on the same file cabinet as the current workflow.



5. Optionally **Notify** workers or other parties by email. See Notify for more information.
6. Optionally change the work item's **Priority**. See Priority for more information.
7. Optionally specify how many work items Rex should be **Processing** in the task in a given cycle. See Processing for more information.
8. Optionally assign **Finishing Touches** to run custom SQL when a work item leaves the task. See Finishing Touches for more information.
9. Click **OK**. The task is configured. The dashed outline is removed, indicating the task is complete.

End Task

An **End Task**  is an end point of the workflow where a work item arrives when it has finished going through the workflow process. When a work item reaches an end task, it is "complete". A workflow may have multiple end tasks.

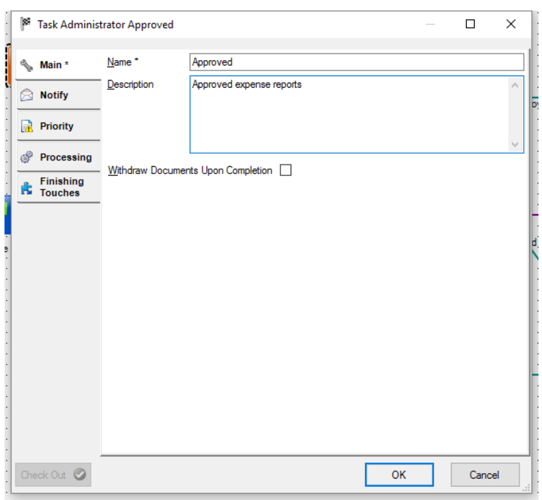
To add an end task:

1. Select the **End** task tool in the administrator toolbar.
2. Click on the workflow map. The task is added.
3. Double-click the end task. The **Task Administrator** opens.

   Tip: As soon as the **Task Administrator** opens, you can take advantage of one of the following keyboard shortcuts:

   - Hit the **TAB** key once to quickly move to the **Name** field. This may be helpful when first adding tasks, especially if you are adding many tasks.
   - Use the up and down arrow keys to navigate to the desired tab.
4. On the **Main** tab:
   a. Enter the task **Name**. The name may be up to 64 characters long.
   b. Optionally enter a **Description**. The description may be up to 80 characters long.
   c. Optionally choose to **Withdraw Documents Upon Completion**, withdrawing the work items from the workflow once they reach an end task and are marked as "complete".

   Tip: The Withdraw Documents Upon Completion option is helpful if many work items could pile up in the end task. Viewing work info in an end task can get slower as the number of work items increases.



5. Optionally **Notify** workers or other parties by email. See Notify for more information.
6. Optionally change the work item's **Priority**. See Priority for more information.
7. Optionally specify how many work items Rex should be **Processing** in the task in a given cycle. See Processing for more information.
8. Optionally assign **Finishing Touches** to run custom SQL when a work item leaves the task. See Finishing Touches for more information.
9. Click **OK**. The task is configured. The dashed outline is removed, indicating the task is complete.

Deadline Task

The **Deadline Task**  receives work items that have been in the workflow "too long" by reaching a specified deadline. When a work item reaches the specified deadline, it is moved from its current location in the workflow to the deadline task. For example, tasks following a deadline task may be designed to make sure these "late" work items get addressed. Each workflow can only have one deadline task.

The deadline assigned by a Deadline Task is also known as a "Workflow Deadline", since the deadline applies to the entire workflow.

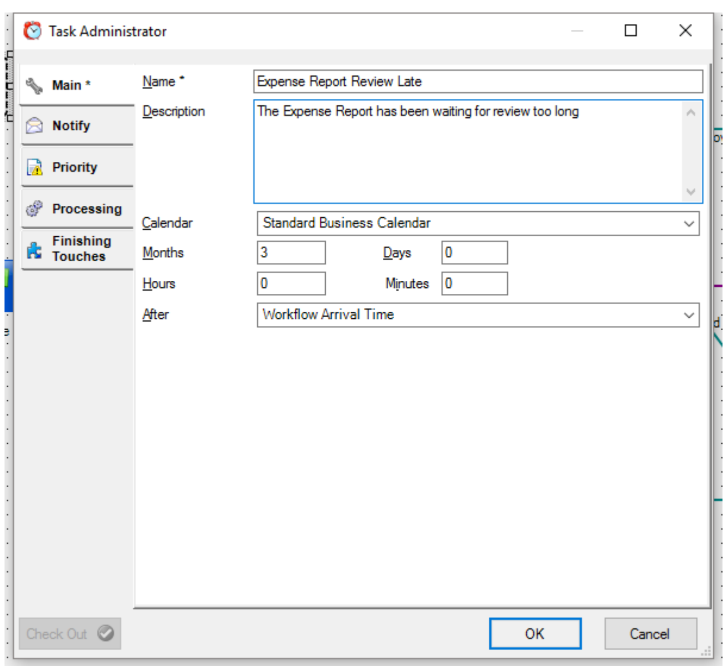
If you want to set a deadline for a task, see Deadline Route for more information.

To add a deadline task:

1. Select the **Deadline** task tool in the administrator toolbar.
2. Click on the workflow map. The task is added.
3. Double-click the deadline task. The **Task Administrator** opens.

   Tip: As soon as the **Task Administrator** opens, you can take advantage of one of the following keyboard shortcuts:

   - Hit the **TAB** key once to quickly move to the **Name** field. This may be helpful when first adding tasks, especially if you are adding many tasks.
   - Use the up and down arrow keys to navigate to the desired tab.
4. On the **Main** tab:
   a. Enter the task **Name**. The name may be up to 64 characters long.
   b. Optionally enter a **Description**. The description may be up to 80 characters long.
   c. Select the **Calendar** on which to base the deadline.
   d. Enter the deadline time in **Months**, **Days**, **Hours**, and/or **Minutes**.
   e. In the **After** field, select the system or file cabinet field date and/or time you want to reference to start counting down to the deadline.



5. Optionally **Notify** workers or other parties by email. See Notify for more information.
6. Optionally change the work item's **Priority**. See Priority for more information.
7. Optionally specify how many work items Rex should be **Processing** in the task in a given cycle. See Processing for more information.
8. Optionally assign **Finishing Touches** to run custom SQL when a work item leaves the task. See Finishing Touches for more information.
9. Click **OK**. The task is configured. The dashed outline is removed, indicating the task is complete.

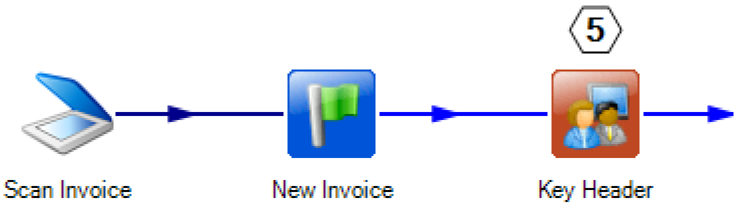
Note: Using the interval of **Months**, **Days**, **Hours**, and/or **Minutes** and the **After** reference date, Rex calculates the future deadline date and time in the following sequence:

1. Rex counts forward the given number of **Months**, taking into account changes in the year and the day of the month (based on the available days in the determined month). The time of day does *not* change and stays the same time as the **After** reference date.
2. Rex counts forward the given number of **Days**, taking into account the **Work Week** business days of the selected **Calendar**. The time of day does *not* change and stays the same time as the **After** reference date.
3. Rex counts forward the given number of **Hours**, taking into account the **Business Hours** of the **Work Week** in the selected **Calendar**.
4. Rex counts forward the given number of **Minutes**, taking into account the **Business Hours** of the **Work Week** in the selected **Calendar**.

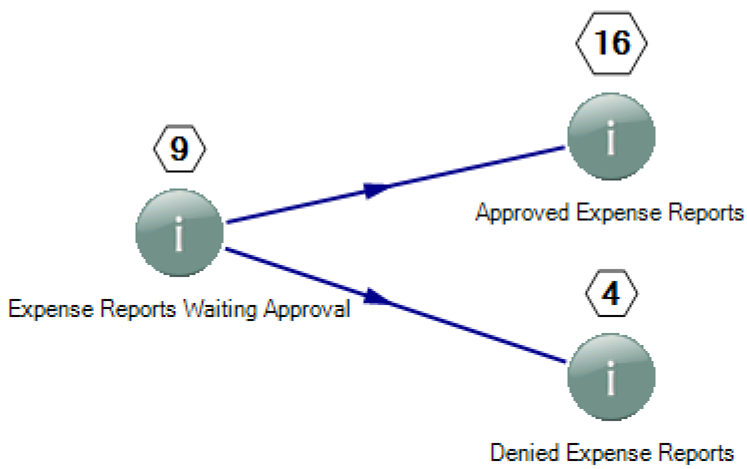
Information Task

An **Information Task**  is a purely illustrative task that represents a step in the process that occurs outside the workflow. Information tasks can also be used to show a summary of the work item counts across multiple tasks and even multiple workflows.

For example, a scan step may occur before the start of the workflow and an email step may occur after the end of the workflow.



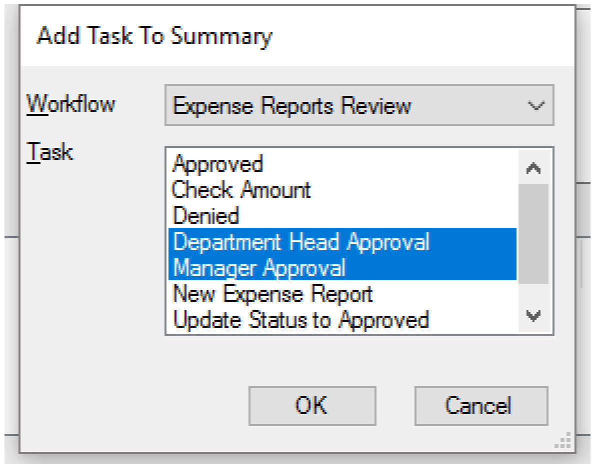
Also, a work item count could be shown for a section of related tasks in the workflow.



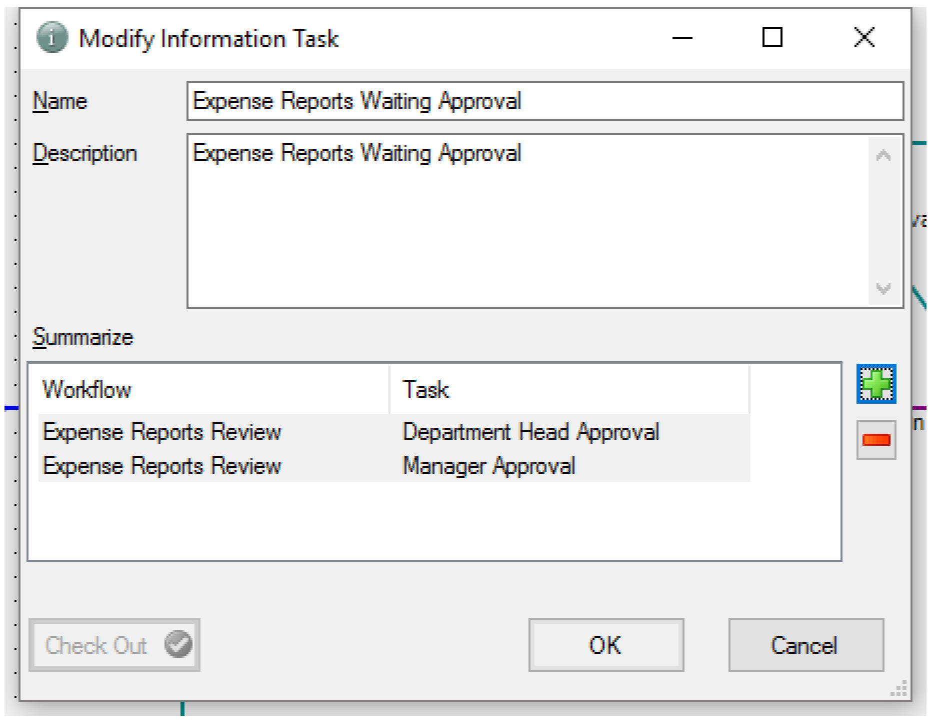
To add an information task:

1. Select the **Information** task tool in the administrator toolbar.
2. Click on the workflow map. The task is added. No additional configuration is required, but you may want to configure the information task further.
3. Double-click the information task. The **Modify Information Task** dialog opens.
4. Optionally enter the task **Name**.
5. Optionally enter a **Description**.
6. Optionally **Summarize** the work item counts of other tasks:
    a. Click **Add Task** . The **Add Task to Summary** dialog opens.
    b. Select the **Workflow** from which you want to add tasks.

       Note: The **Workflow** list only contains workflows built on the same base file cabinet as the workflow that has the information task.
    c. Select one or more **Tasks** you want to summarize from the selected workflow. Select multiple tasks using **CTRL+click** or **SHIFT+click**.



d. Click **OK**. The tasks are added to the **Summarize** list. You may continue to **Add Tasks** or **Remove Tasks** as desired.



7. Click **OK**. The task is configured.

8. Optionally change the task icon by right-clicking the information task and selected **Change Picture**. Workflow iQ Manager provides some standard icons for external processes in its install directory under the **Icons** folder, such as an inbox or scanner . See Add Tasks for more information on changing a task's icon.

Notify

Optionally **Notify** workers or other parties by email. For example, a notification may be sent to alert a worker of an important event in the workflow process. When a notification is assigned to a task, it is indicated by a mail icon . (Note that a mail icon could also indicate that there is a work-o-gram for a user task. See Configure Work-o-gram for more information.)

Once you create a notification it is available to assign to any task in any workflow. If desired, when creating a notification you may limit it to only be available in one specific workflow. See Create and Maintain Notifications for more information.

Notifications may be sent at different times as follows:

- **On Arrival:** The notification is sent each time a work item arrives at the task.
- **On Departure:** The notification is sent each time a work item leaves the task.
- **As Reminder:** The notification is sent for each work item that has spent a specified amount of time in the task.

  Note: You can only assign one notification as a reminder to a task.
- **As Repeating Reminder:** A notification is sent for each work item that has spent a specified interval in the task every time the specified interval passes.

  Note: You can only assign one notification as a repeating reminder to a task.

The time a notification can be sent is limited by task type as follows:

TASK TYPE	ON ARRIVAL	ON DEPARTURE	AS REMINDER	AS REPEATING REMINDER
Start Task	N/A	Available	N/A	N/A
User Task	Available	Available	Available	Available
Hub Task	Available	Available	N/A	N/A
Rendezvous Task	Available	Available	Available	Available
Wait-For Task	Available	Available	Available	Available
Subflow Task	Available	Available	Available	Available
End Task	Available	N/A	N/A	N/A
Deadline Task	Available	Available	N/A	N/A

Assign Notification

Optionally **Notify** workers or other parties by email. For example, a notification may be sent to alert a worker of an important event in the workflow process. When a notification is assigned to a task, it is indicated by a mail icon . (Note that a mail icon could also indicate that there is a work-o-gram for a user task. See Configure Work-o-gram for more information.)

See Notifications Overview for more general information on notifications and when they can be sent. See Create and Maintain Notifications for more information on creating and maintaining notifications.

See the following sections for instructions:

- Assign Notification
- Modify Notification Assignment
- Remove Notification

Tip: To see everywhere a notification is assigned, go to **Tools>Notification Administrator**, select a notification, and click **Current Assignments** . Double-click a row to open the workflow and go to the task.

Assign Notification

To assign a notification to a task:

1. Double-click the desired task. The **Task Administrator** opens.
2. On the **Notify** tab, click **Assign Notification** . The **Assign Notification** dialog opens.
3. Select the desired **Notification**. If needed, you may **Create a Notification** (see Create and Maintain Notifications for more information).
4. Select **When** the notification will be sent:
    - **On Arrival:** The notification is sent each time a work item arrives at the task.
    - **On Departure:** The notification is sent each time a work item leaves the task.
    - **As Reminder:** The notification is sent for each work item that has spent a specified amount of time in the task.

      Note: You can only assign one notification as a reminder to a task.
    - **As Repeating Reminder:** A notification is sent for each work item that has spent a specified interval in the task every time the specified interval passes.

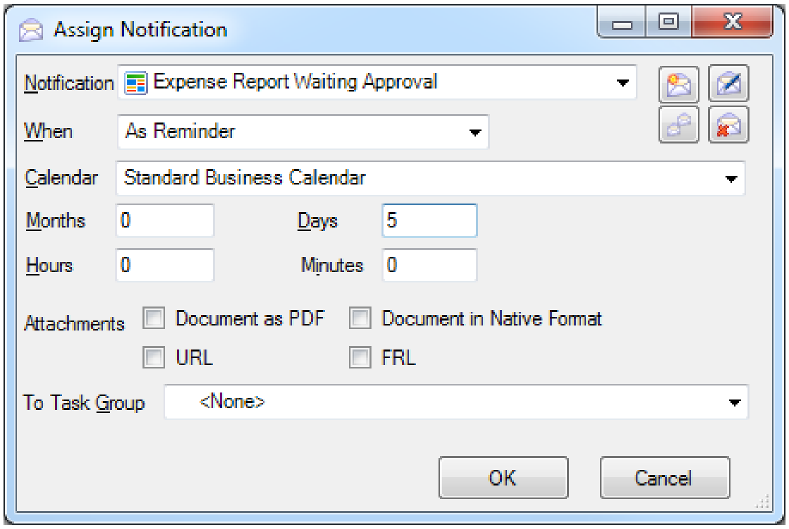
      Note: You can only assign one notification as a repeating reminder to a task.
    - **Note:** The time a notification can be sent is limited by task type. See Notifications Overview for more information.
5. If you are sending the notification **As a Reminder** or **As a Repeating Reminder**:
    a. Select the **Calendar** on which to base the reminder time.
    b. Enter the reminder time in **Months**, **Days**, **Hours**, and/or **Minutes**.
6. Optionally select one or more **Attachments** to include in the notification email:
    - **Document as PDF:** The work item in PDF format.

      Note: PDF files cannot be created for FDD GOS pages or Forms iQ pages.
    - **Document in Native Format:** The work item in its native format.

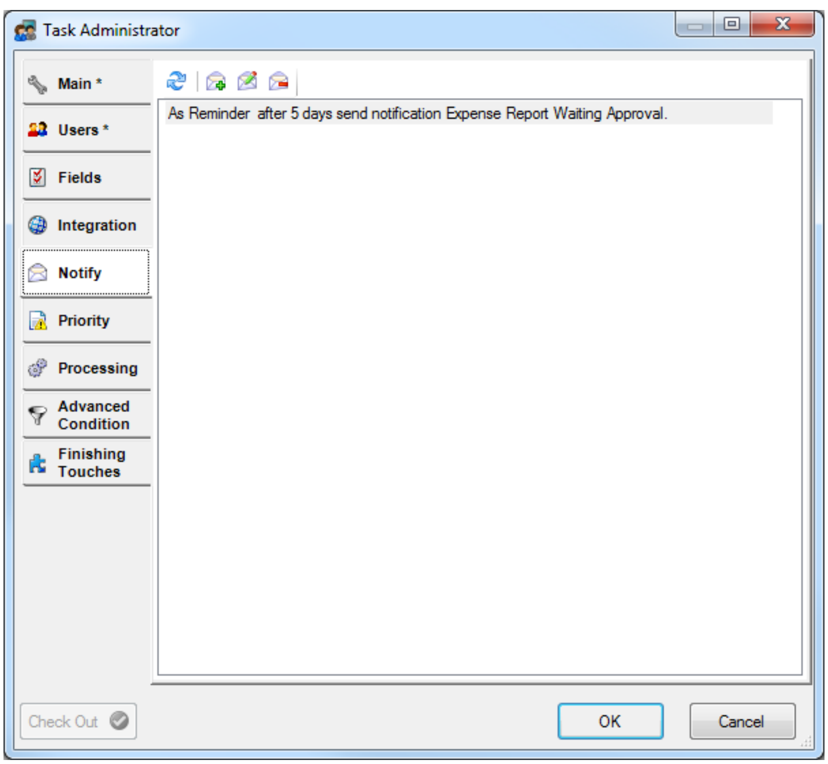
- **URL:** A WebFDD link to the work item. The recipient may click the URL to launch WebFDD and login to view the work item.
- **FRL:** A FDD URL to the work item. The recipient may click on the .frl to launch FDD Client and login to view the work item.

  Note: FDD must be installed on the recipient's computer.

7. In the **To Task Group** field select a group or user you want to send the notification to for this specific task, in addition to the recipients already configured in the notification itself.



8. Click **OK**. The notification is assigned to the task.



9. In the **Task Administrator**, click **OK**. Your notification assignment is saved.

Modify Notification Assignment

To modify a notification assignment:

1. Double-click the desired task. The **Task Administrator** opens.
2. On the **Notify** tab, select the desired notification and click **Modify Notification Assignment** . The **Assign Notification** dialog opens.
3. Modify the notification assignment options as desired.
4. Click **OK**. The notification assignment is modified.
5. In the **Task Administrator**, click **OK**. Your notification assignment is saved.

Remove Notification

To remove a notification from a task:

1. Double-click the desired task. The **Task Administrator** opens.
2. On the **Notify** tab, select the desired notification and click **Remove Notification** . The notification is removed from the task.
3. In the **Task Administrator**, click **OK**. Your changes are saved.

Create and Maintain Notifications

Create and maintain email notifications which may be sent to workers or other parties. For example, a notification may be sent to alert a worker of an important event in the workflow process.

Once you create a notification it is available to assign to any task in any workflow. If desired, when creating a notification you may limit it to only be available in one specific workflow.

See Notifications Overview for more general information on notifications and when they can be sent. See Assign Notification for more information on assigning a notification to a task.

See the following sections for instructions:

- Create Notification
- Modify Notification
- Clone Notification
- Delete Notification

Note: Notifications can also be created and maintained in the **Notification Administrator** under the **Tools** menu.

Tip: When creating or modifying a notification, you may want to include values that are stored in a location in the database other than the file cabinet. Use **Rule Tokens** to write custom SQL (Structured Query Language) to retrieve values you want to use in the notification's **To**, **Cc**, **Bcc**, **From**, **From Name**, **Reply To**, **Subject**, or **Body**. For example, you may write SQL to retrieve a custom list of email addresses to use as the email recipients. See Rule Tokens for more information.

Create Notification

To create a notification:

1. Select **Tools>Notification Administrator**. The **Notification Administrator** opens.

   You can also create a notification from inside a task in the **Task Administrator** on the **Notify** tab by clicking **Assign Notification** .

2. Click **Create Notification** . The **Create Notification** dialog opens.

   Alternatively, you may **Clone** an existing notification. See Clone Notification for more information.

3. Enter the notification **Name**.

4. Click **Show All Selectable Groups and Users** . All workflow users and groups with members that are workflow users are displayed in the list.

5. Locate the desired group and user recipients in the list and specify whether you want to send the email notification **To** them, **Cc** them, or **Bcc** them. You may select multiple groups and users using **CTRL+click** or **SHIFT+click** and right-click to choose **Send To Selected Groups** To, **Carbon Copy Selected Groups** Cc, or **Blind Carbon Copy Selected Groups** Bcc.

   Tip: In the group/user list hit the key of the first letter of the group/user name to jump to that part of the list. Hit the letter key multiple times to cycle through all groups/users that start with that letter. Also, use the up and down arrow keys to navigate in the group/user list.

6. Optionally enter additional recipients in the **To**, **Cc**, and **Bcc** fields. When entering multiple email addresses, separate each value with a semicolon **;**. You may use the **Token** list to **Insert** tokens into the **To**, **Cc**, or **Bcc** fields. See Appendix A: Tokens for more information.

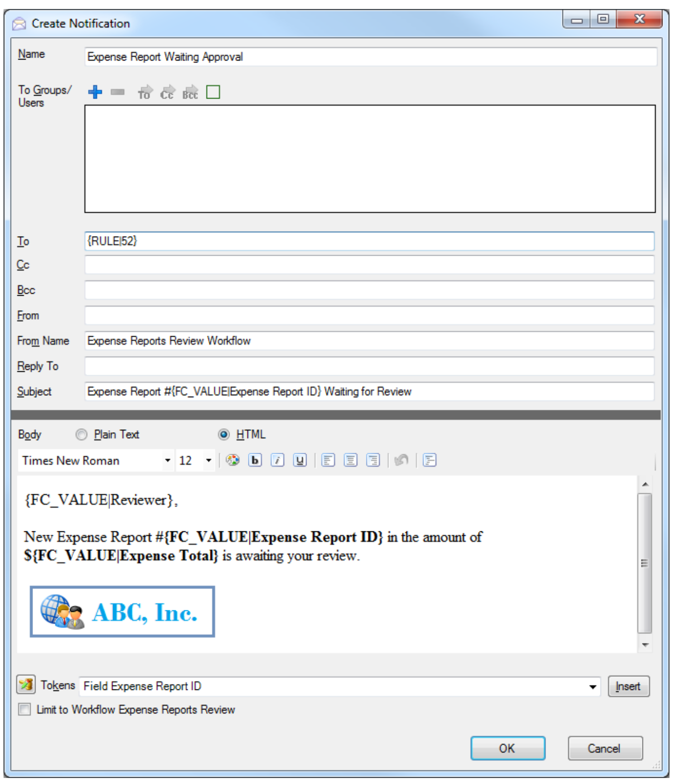
   For example, **jsmith@abc.com;{FC_VALUE|mgr_email};jdoe@abcinc.com;{RULE|7}**

7. Optionally enter the **From** email address that you want to send the email notification (other than the Rex global default). You may use the **Token** list to **Insert** tokens into the **From** field. See Appendix A: Tokens for more information.
8. Optionally enter the **From Name** that you want to display as the friendly name of the email notification's sender.   You may use the **Token** list to **Insert** tokens into the **From** field. See Appendix A: Tokens for more information.
9. Optionally enter one or more **Reply To** email addresses that the notification recipient would reply to. When entering multiple email addresses, separate each value with a semicolon **;**. You may use the **Token** list to **Insert** tokens into the **Reply To** field. See Appendix A: Tokens for more information.

   For example, **jsmith@abc.com;{FC_VALUE|mgr_email};jdoe@abcinc.com;{RULE|7}**
10. Enter the email notification's **Subject**. You may use the **Token** list to **Insert** tokens into the **Subject** field. See Appendix A: Tokens for more information.
11. Choose the **Body** format you want to use, either **Plain Text** or **HTML**.
12. Enter the **Body** of the notification email. You may use the **Token** list to **Insert** tokens into the **Body** field. See Appendix A: Tokens for more information.

    Tips:

    - If you are using the **HTML** format, click **Show Source** to add advanced HTML features, such as pictures, links, etc.
    - If the body is long, you may drag the gray split bar up to see more of the body.
13. Optionally turn off the **Limit to Workflow** option to allow this notification to be used in multiple workflows. Leave this option on to limit the notification to only be available in this specific workflow.



14. Click **OK**. The notification is created. See Assign Notification for more information on assigning a notification to a task.

Modify Notification

To modify a notification:

1. Select **Tools>Notification Administrator**. The **Notification Administrator** opens.

   You can also modify a notification from inside a task in the **Task Administrator** on the **Notify** tab by clicking **Assign Notification** .

   Tip: When the workflow is checked in, double-click the notification in the **Notify** tab to open the notification assignment.

2. Select the desired notification and click **Modify Notification** . The **Modify Notification** dialog opens.
3. Modify the notification as needed.

   Note: If you uncheck the **Limit to Workflow** option and save the notification, it cannot be turned back on for that notification.

4. Click **OK**. The notification is modified.

Clone Notification

To clone a notification:

1. Select **Tools>Notification Administrator**. The **Notification Administrator** opens.

   You can also clone a notification from inside a task in the **Task Administrator** on the **Notify** tab by clicking **Assign Notification** .

2. Select the desired notification and click **Clone Notification** . The **Clone Notification** dialog opens.
3. Modify the clone notification as needed.
4. Click **OK**. The notification is created.

Delete Notification

To delete a notification:

1. Select **Tools>Notification Administrator**. The **Notification Administrator** opens.

   You can also delete a notification from inside a task in the **Task Administrator** on the **Notify** tab by clicking **Assign Notification** .

2. Select the desired notification and click **Delete Notification** . A prompt opens to confirm the delete.
3. Click **Yes** to proceed with the delete. The notification is deleted.

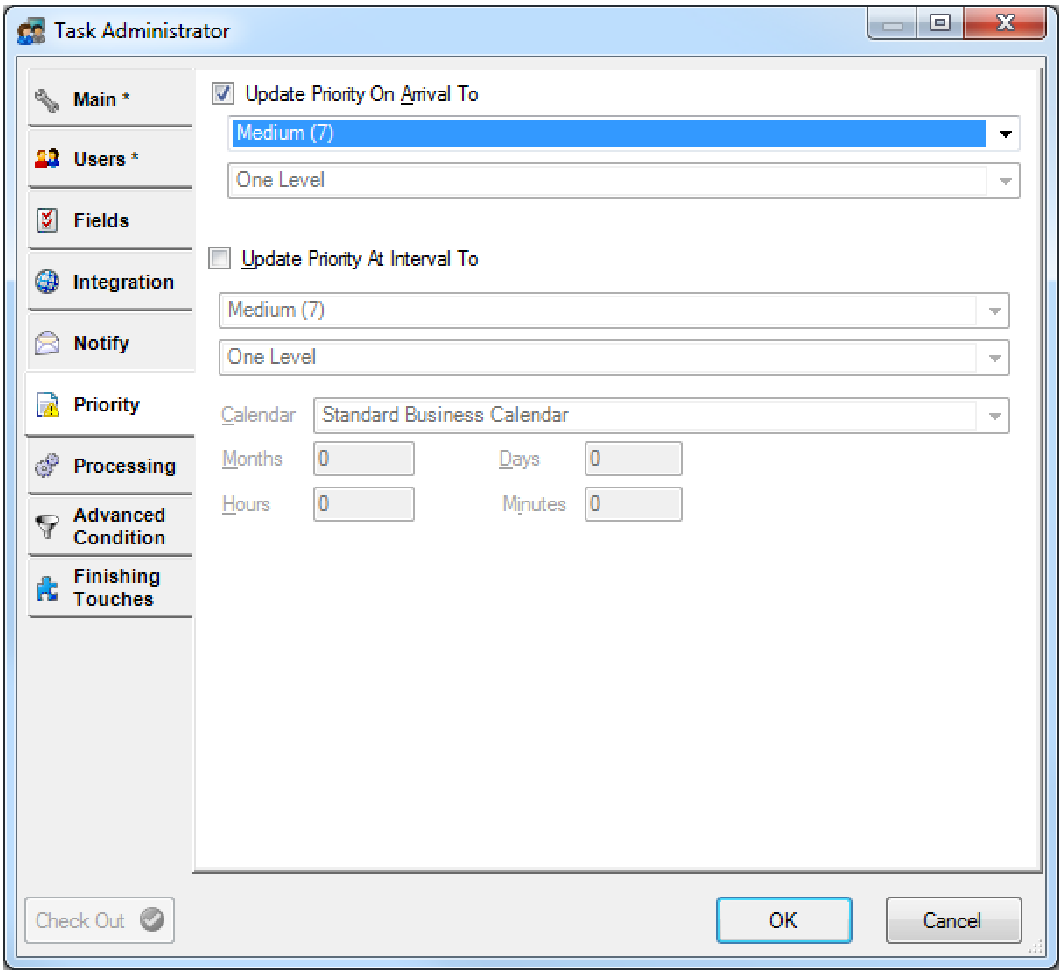
Priority

Optionally change the work item's **Priority** **On Arrival** to a task and/or **At an Interval** while it sits in a user, rendezvous, wait-for, or subflow task. Priority is on a scale of **1** to **9**, with **1** being the highest priority. The default priority is **9**.

Update Priority on Arrival

To update a work item's priority on arrival to a task:

1. Double-click the desired task. The **Task Administrator** opens.
2. On the **Priority** tab, check on **Update Priority on Arrival To**. The arrival priority options enable.
3. Select a specific priority to which you want to update a work item when it arrives or **Upgrade** or **Downgrade** the priority one or more **Levels** relative to a work item's current priority when it arrives.

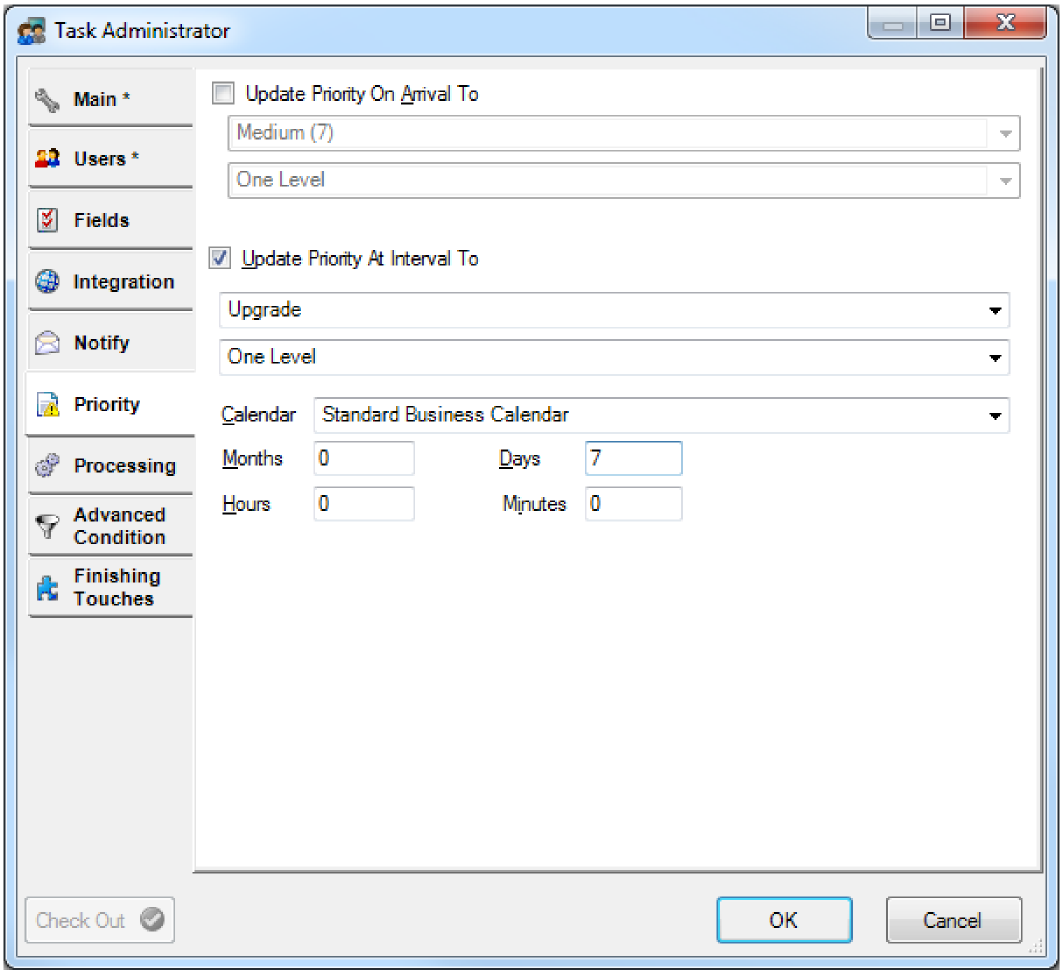


4. Click **OK**. Your priority configuration is saved.

Update Priority at Interval

To update a work item's priority at an interval in a user, rendezvous, wait-for, or subflow task:

1. Double-click the desired task. The **Task Administrator** opens.
2. On the **Priority** tab, check on **Update Priority At Interval To**. The interval priority options enable.
3. Select a specific priority to which you want to update a work item at an interval or **Upgrade** or **Downgrade** the priority one or more **Levels** relative to the work item's current priority at an interval.
4. Select the **Calendar** on which to base the interval.
5. Enter the interval time in **Months**, **Days**, **Hours**, and/or **Minutes**.



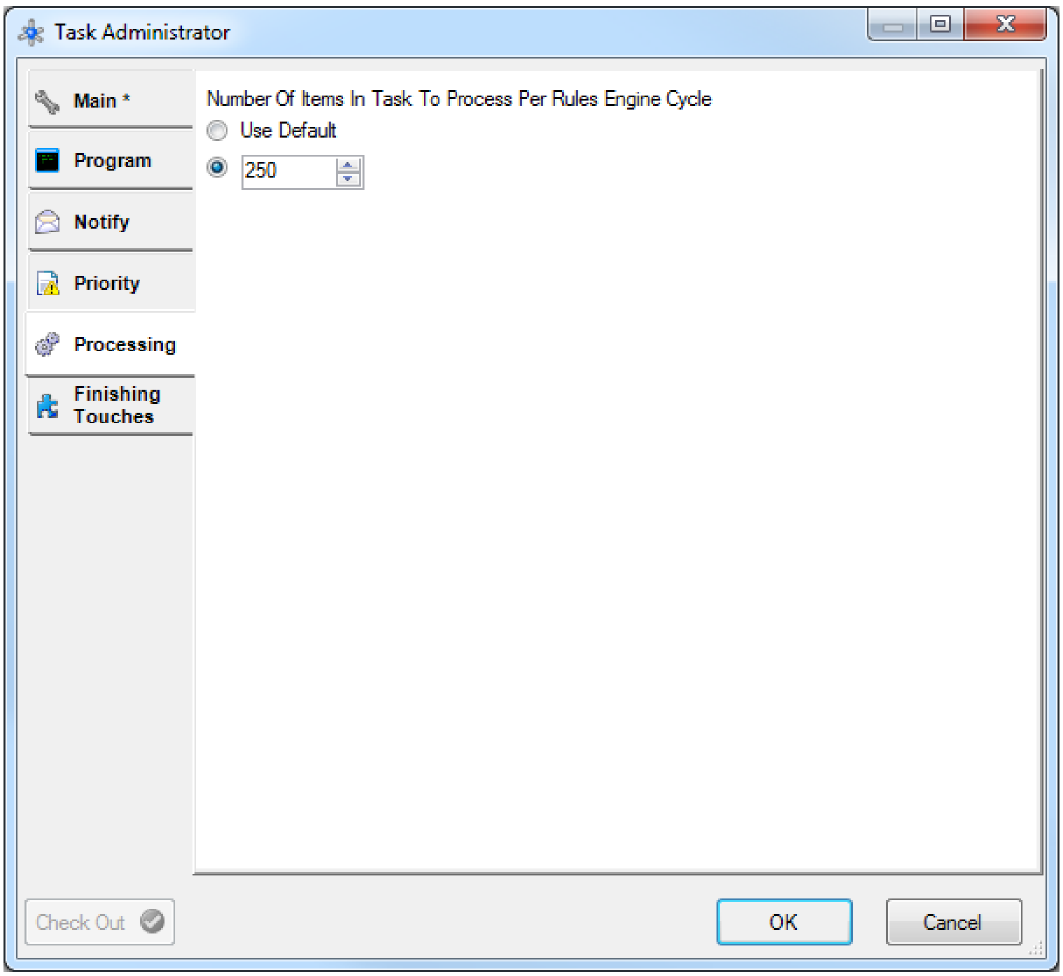
6. Click **OK**. Your priority configuration is saved.

Processing

Optionally specify how many work items Rex should be **Processing** in the task in a given cycle. By default, Rex processes up to 1,000 work items in each task. You may increase the number for more important tasks or decrease the number for less important tasks.

To configure specific processing rules for a task:

1. Double-click the desired task. The **Task Administrator** opens.
2. On the **Processing** tab, change the **Number Of Items In Task To Process Per Rules Engine Cycle** from **Use Default** to entering a specific number.
3. Enter the number of work items in the task that you want Rex to process per cycle. Increase the number above 1,000 for more important tasks or decrease the number below 1,000 for less important tasks.



4. Click **OK**. Your processing configuration is saved.

Finishing Touches

Assign Finishing Touch

Optionally assign **Finishing Touches** to run custom SQL (Structured Query Language) when a work item leaves the task. When a finishing touch is assigned to a task, it is indicated by a pen icon .

Note: A system finishing touch with a yellow icon is a specialized finishing touch created by Feith and it is not recommended to make changes to a system finishing touch.

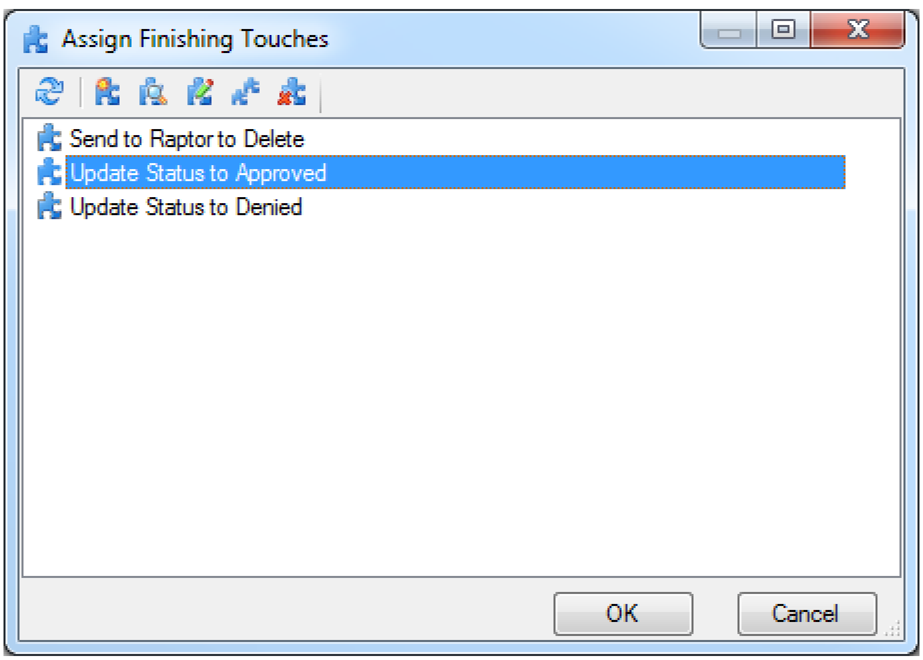
See Create and Maintain Finishing Touches for more information on creating and maintaining finishing touches.

To assign a finishing touch to a task:

1. Double-click the desired task. The **Task Administrator** opens.

2. On the **Finishing Touches** tab, click **Assign Finishing Touch** . The **Assign Finishing Touches** dialog opens.

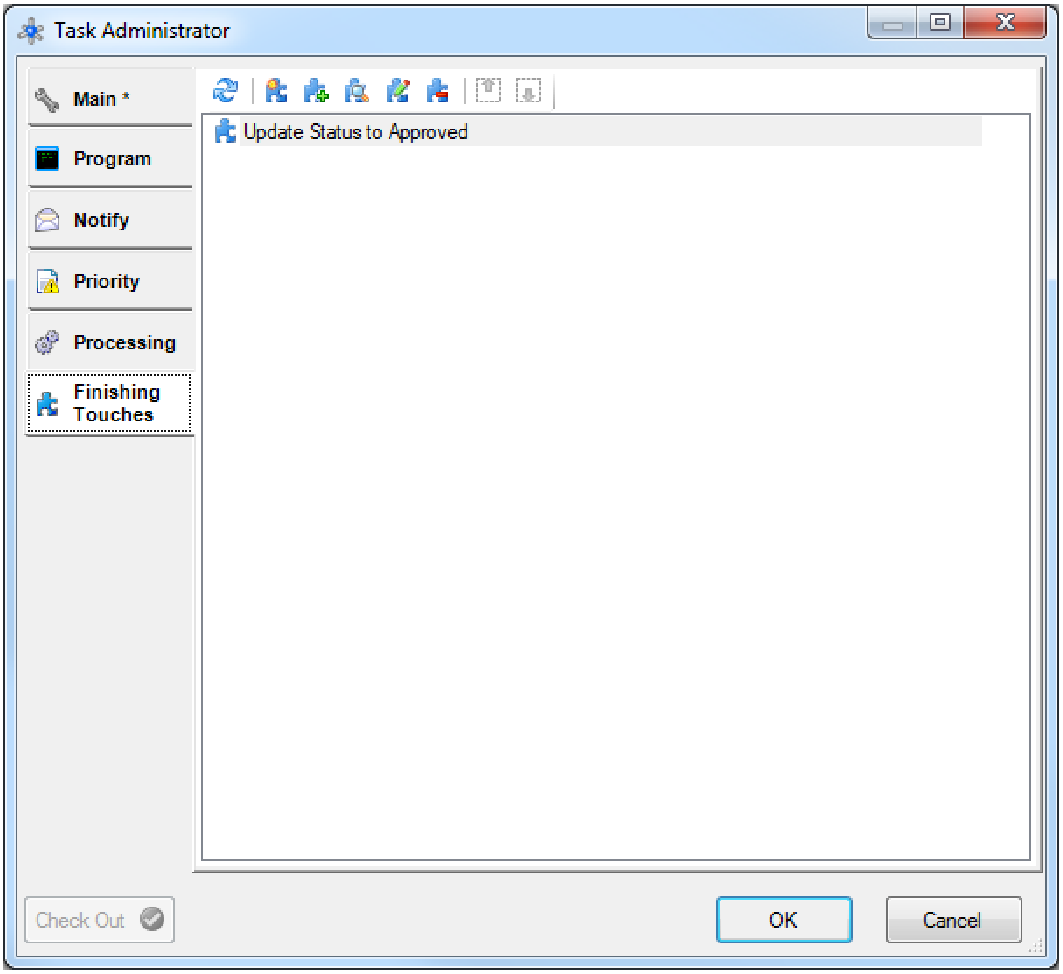
   Alternatively, you may **Create a Finishing Touch** . See Create Finishing Touch for more information.



3. Select one or more finishing touches. Select multiple finishing touches using **CTRL+click** or **SHIFT+click**.

   Tip: View a finishing touch's SQL by selecting it and clicking **Describe Finishing Touch** .

4. Click **OK**. The finishing touch(es) is added to the list.



5. Optionally reorder the finishing touches by selecting one or more and using the **Move Selected Finishing Touches Up** and **Move Selected Finishing Touches Down** buttons, specifying the order in which they should run. Select multiple finishing touches using **CTRL+click** or **SHIFT+click**.
6. Click **OK**. Your finishing touch assignment is saved.

To remove a finishing touch from a task:

1. Double-click the desired task. The **Task Administrator** opens.
2. On the **Finishing Touches** tab, select the desired finishing touch and click **Remove Finishing Touch** . The finishing touch is removed from the task.

Create and Maintain Finishing Touches

Optionally assign **Finishing Touches** to run custom SQL when a work item leaves the task.

See the following sections for instructions:

- Create Finishing Touch
- Modify Finishing Touch
- Clone Finishing Touch
- Retire/Un-Retire Finishing Touch
- Delete Finishing Touch

Note: Finishing touches can also be created and maintained in the **Finishing Touch Administrator** under the **Tools** menu.

Create Finishing Touch

To create a finishing touch:

1. Select **Tools>Finishing Touch Administrator**. The **Finishing Touch Administrator** opens.

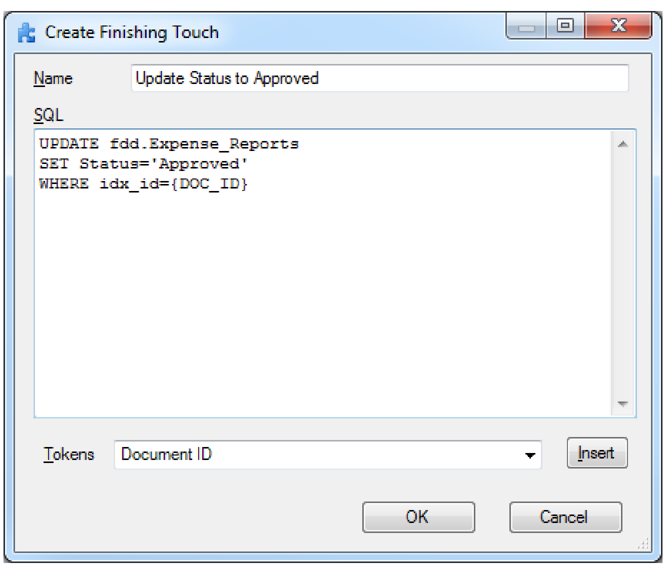
   You can also create a finishing touch from inside a task in the **Task Administrator** on the **Finishing Touches** tab.

2. Click **Create a Finishing Touch** . The **Create Finishing Touch** dialog opens.

   Alternatively, you may **Clone** an existing finishing touch. See Clone Finishing Touch for more information.

3. Enter the finishing touch **Name**.

4. Enter the **SQL** to run in the finishing touch. You may use the **Token** list to **Insert** tokens into the **SQL** field. See Appendix A: Tokens for more information.

   Note: The table referenced in the above SQL is not in the standard Feith FDD Schema but is used only for the purpose of this example.

5. Click **OK**. The finishing touch is created. See Assign Finishing Touch for more information on assigning a finishing touch to a task.

Modify Finishing Touch

To modify a finishing touch:

1. Select **Tools>Finishing Touch Administrator**. The **Finishing Touch Administrator** opens.

   You can also modify a finishing touch from inside a task in the **Task Administrator** on the **Finishing Touches** tab. If the finishing touch you want to modify is not assigned to the task, you can view all finishing touches by clicking **Assign Finishing Touch** .

   Note: A system finishing touch with a yellow icon is a specialized finishing touch created by Feith and it is not recommended to make changes to a system finishing touch.

2. Select the desired finishing touch and click **Modify Finishing Touch** . The **Modify Finishing Touch** dialog opens.
3. Modify the finishing touch as needed.
4. Click **OK**. The finishing touch is modified.

Clone Finishing Touch

To clone a finishing touch:

1. Select **Tools>Finishing Touch Administrator**. The **Finishing Touch Administrator** opens.

   You can also clone a finishing touch from inside a task in the **Task Administrator** on the **Finishing Touches** tab by clicking **Assign Finishing Touch** .

2. Select the desired finishing touch and click **Clone Finishing Touch** . The **Clone Finishing Touch** dialog opens.
3. Modify the clone finishing touch as needed.
4. Click **OK**. The finishing touch is created.

Retire/Un-Retire Finishing Touch

You can retire a finishing touch so it continues to be used where it is currently assigned but cannot be assigned anywhere new. This would be an "intermediate" step taken prior to deleting the finishing touch; maybe you have a newer, better finishing touch to replace it but you want to keep around the old finishing touch while preventing other workflow designers from using it in new places.

To retire a finishing touch:

1. Select **Tools>Finishing Touch Administrator**. The **Finishing Touch Administrator** opens.

2. Select the desired finishing touch and click **Retire Finishing Touch** . The finishing touch is retired. It will run where it is currently assigned but it cannot be assigned anywhere new.

To view retired finishing touches:

- In the **Finishing Touch Administrator**, click the radio button to view **All Finishing Touches**. A combined list of available and retired finishing touches displays.

To un-retire a finishing touch:

- In the **Finishing Touch Administrator**, right-click the desired finishing touch and select **Un-Retire Finishing Touch** .

Delete Finishing Touch

Tip: If you do not want to delete the finishing touch yet, consider retiring the finishing touch instead.

To delete a finishing touch:

1. Select **Tools>Finishing Touch Administrator**. The **Finishing Touch Administrator** opens.

   You can also delete a finishing touch from inside a task in the **Task Administrator** on the **Finishing Touches** tab by clicking **Assign Finishing Touch**.
2. Click **Assign Finishing Touch**. The **Assign Finishing Touches** dialog opens.
3. Select the desired finishing touch and click **Delete Finishing Touch**. A prompt opens to confirm the delete and removal of the finishing touch from all tasks where it is assigned.
4. Click **Yes** to continue with the delete. The finishing touch is deleted.

Rule Tokens

Insert Rule Token

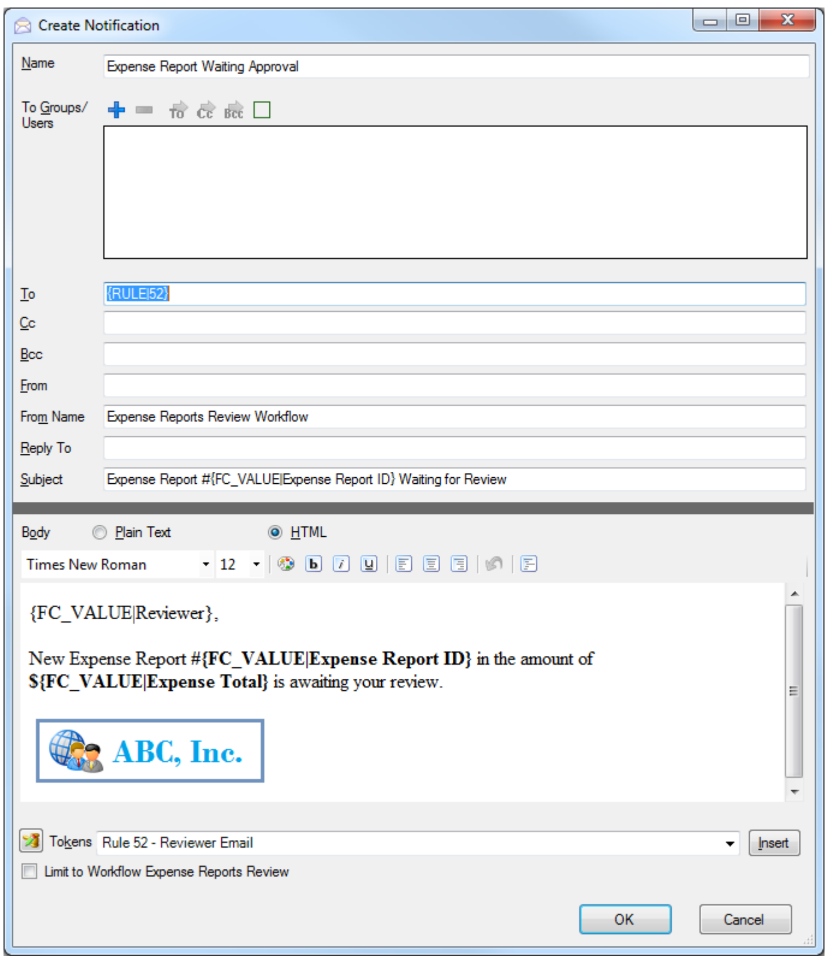
Optionally insert a **Rule Token** into a notification, work-o-gram, or hub task program to retrieve values from anywhere in the database using custom SQL (Structured Query Language). For example, you may write SQL to retrieve a custom list of email addresses, stored in a location other than the file cabinet, to use as email recipients.

See Create and Maintain Rule Tokens for more information on creating and maintaining rule tokens.

To insert a rule token:

1. Open the desired notification, work-o-gram, or hub task program. See Create and Maintain Notifications, Configure Work-o-gram, and Configure Program for more information.
2. Place your cursor in the field where you want to insert the rule token. For example, a notification's **To**.
3. In the **Tokens** list select the desired rule token.

   You may create or edit a rule token by clicking **Edit Rule Tokens**. See Create and Maintain Rule Tokens for more information on creating and maintaining rule tokens.
4. Click **Insert**. The rule token is inserted in the cursor location.



Create and Maintain Rule Tokens

Optionally insert a **Rule Token** into a notification, work-o-gram, or hub task program to retrieve values from anywhere in the database using custom SQL (Structured Query Language).

Note: A rule token returns a single value or a comma-separated list of values from *one* column.

See Insert Rule Token for more information on using rule tokens in a notification, work-o-gram, or hub task program.

See the following sections for instructions:

- Create Rule Token
- Modify Rule Token
- Clone Rule Token
- Delete Rule Token

Create Rule Token

To create a rule token:

1. Select **Tools>Rule Token Administrator**. The **Rule Token Administrator** opens.

   You can also access the **Rule Token Administrator** from inside a notification, work-o-gram, or hub task program by clicking **Edit Rule Tokens** .

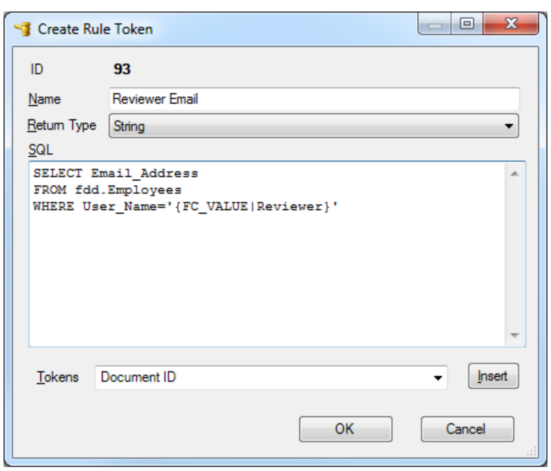
2. Click **Create Rule Token** . The **Create Rule Token** dialog opens.

   Alternatively, you may **Clone** an existing rule token. See Clone Rule Token for more information.

3. Enter the rule token **Name**.

4. Select the **Return Type** of the data coming back from the SQL query (e.g. **String** for email addresses).

5. Enter the **SQL** to retrieve the desired values from the database. You may use the **Token** list to **Insert** tokens into the **SQL** field. See Appendix A: Tokens for more information.



   Note: The table referenced in the above SQL is not in the standard Feith FDD Schema but is used only for the purpose of this example.

6. Click **OK**. The rule token is created. See Insert Rule Token for information on using rule tokens in a notification, work-o-gram, or hub task program.

Note: If your rule token is retrieving date or datetime values, select a **Return Type** of **String** and in your **SQL** format the date or datetime value using the appropriate database function.

To change a date or datetime into a string in the desired format:

- On Oracle use the "to_char" function. For example, format a datetime as a string in 24-hour time:

```
select to_char(Submitted, 'MM/DD/YYYY HH24:MM:SS') from fdd.Requests
```

- On MS SQL Server use the "convert" function. For example, format a datetime as a string with just the date:

```
select convert(varchar, Submitted, 101) from fdd.Requests
```

See Oracle and MS SQL Server documentation for more information on using these functions to format a date or datetime as desired.

Modify Rule Token

To modify a rule token:

1. Select **Tools>Rule Token Administrator**. The **Rule Token Administrator** opens.

   You can also access the **Rule Token Administrator** from inside a notification, work-o-gram, or hub task program by clicking **Edit Rule Tokens** .
2. Select the desired rule token and click **Modify Rule Token** . The **Modify Rule Token** dialog opens.
3. Modify the rule token as needed.
4. Click **OK**. The rule token is modified.

Clone Rule Token

To clone a rule token:

1. Select **Tools>Rule Token Administrator**. The **Rule Token Administrator** opens.

   You can also access the **Rule Token Administrator** from inside a notification, work-o-gram, or hub task program by clicking **Edit Rule Tokens** .
2. Select the desired rule token and click **Clone Rule Token** . The **Clone Rule Token** dialog opens.
3. Modify the clone rule token as needed.
4. Click **OK**. The rule token is created.

Delete Rule Token

1. Select **Tools>Rule Token Administrator**. The **Rule Token Administrator** opens.

   You can also access the **Rule Token Administrator** from inside a notification, work-o-gram, or hub task program by clicking **Edit Rule Tokens** .
2. Select the desired rule token and click **Delete Rule Token** . A prompt opens to confirm the delete and invalidation of the token wherever it exists in a notification, work-o-gram, or hub task program.
3. Click **Yes** to continue with the delete. The rule token is deleted.

Calendars

A **Calendar** defines business hours and holidays. Calendars are used with the following:

- Deadline Tasks
- Reminder and Repeating Reminder Notifications
- Priority
- Deadline Route

The FDD system includes two calendars by default:

- **24 Hours/Day, 7 Days/Week:** Business hours are 12 AM to 12PM, Sunday to Sunday with no holidays.
- **Standard Business Calendar:** Business hours are 9 AM to 5 PM, Monday to Friday with some holidays.

See the following sections for instructions:

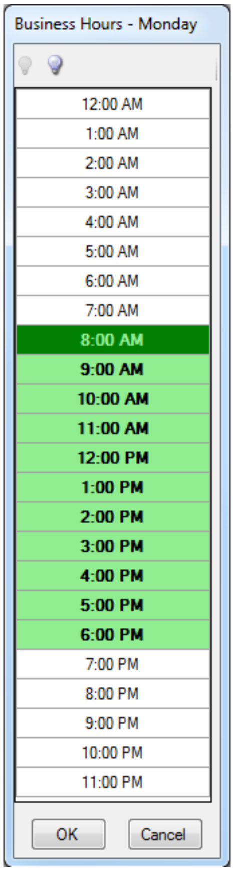
- Create Calendar
- Modify Calendar
- Clone Calendar
- Export Calendar
- Import Calendar
- Delete Calendar

Create Calendar

To create a calendar:

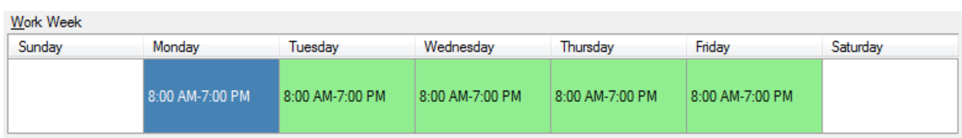
1. Select **Tools>Calendar Editor**. The **Calendar Editor** opens.
2. Click **Create Calendar** . The **Create Calendar** window opens.

   Alternatively, you may **Clone** an existing calendar. See Clone Calendar for more information.
3. Enter a calendar **Name**.
4. Define the business days in the **Work Week**:
   a. For a given day, double-click the box that says **All Day**. The **Business Hours** dialog opens, displaying the business hours highlighted green.
   b. Select one or more hours and right-click and choose to **Turn On Selected Hours** or **Turn Off Selected Hours** . To select multiple days use **CTRL+click** or **SHIFT+click**. Business hours are highlighted green.



c. Click **OK**. The business hours for that day are defined.

d. Repeat this process as needed for each work day. Days with business hours are highlighted green.



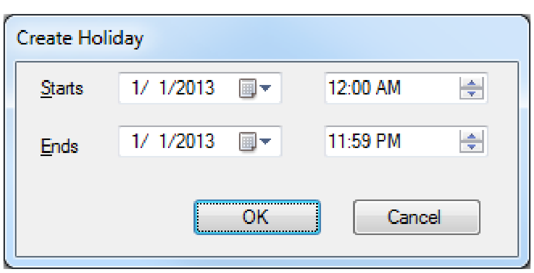
5. Optionally create **Holidays**:

a. Click **Create Holiday** . The **Create Holiday** dialog opens.

Alternatively, use the calendar control on the right side and double-click the date you want the holiday to start.

b. Select or enter the date and time the holiday **Starts**.

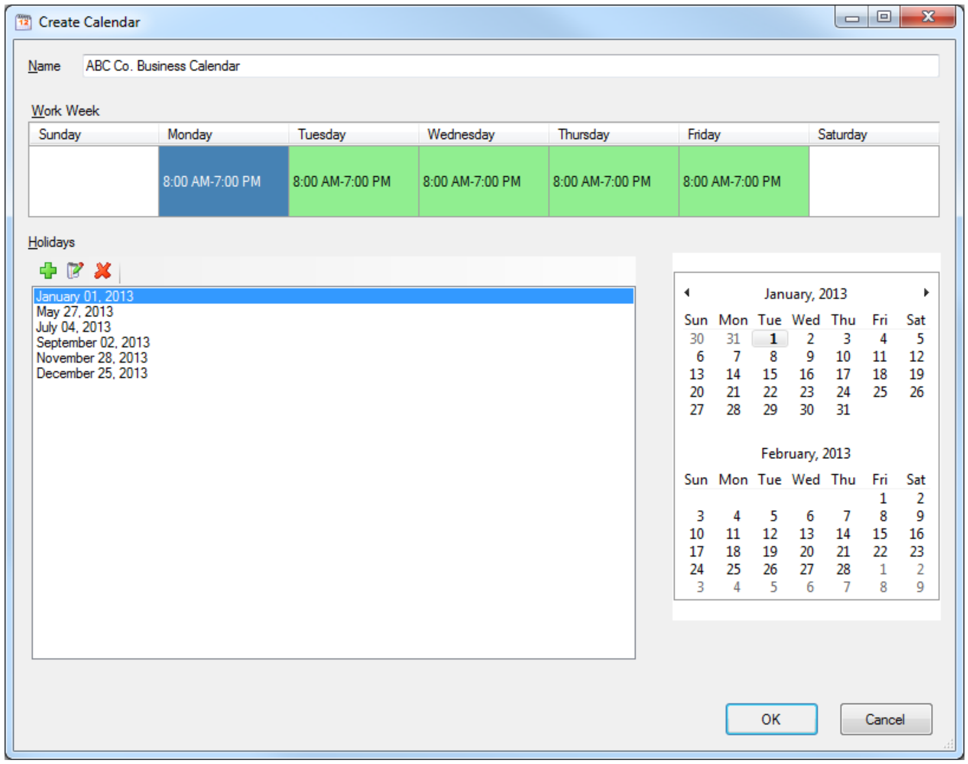
c. Select or enter the date and time the holiday **Ends**.



d. Click **OK**. The holiday is created.

Note: If you create a holiday that is right next to another holiday, the two will be combined into a single holiday.

e. Repeat this process as needed to create more holidays.



6. Click **OK**. The calendar is created.

Modify Calendar

To modify a calendar:

1. Select **Tools>Calendar Editor**. The **Calendar Editor** opens.
2. Select the desired calendar and click **Modify Calendar** . The **Modify Calendar** dialog opens.
3. Modify the calendar as needed.
4. Click **OK**. The calendar is modified.

Clone Calendar

To clone a calendar:

1. Select **Tools>Calendar Editor**. The **Calendar Editor** opens.
2. Select the desired calendar and click **Clone Calendar** . The **Clone Calendar** dialog opens.
3. Modify the clone calendar as needed.
4. Click **OK**. The calendar is created.

Export Calendar

To export a calendar:

1. Select **Tools>Calendar Editor**. The **Calendar Editor** opens.
2. Select the desired calendar and click **Export Calendar**. The **Export Calendar** dialog opens, prompting you to save the file.
3. Browse to the desired location and click **Save**. The .xml export file containing the calendar definition is saved to the specified location.

Import Calendar

To import a calendar:

1. Select **Tools>Calendar Editor**. The **Calendar Editor** opens.
2. Click **Import Calendar**. The **Open** dialog opens, prompting you to select the export file.
3. Browse to the export file and select it. You can select either a:
   - .xml calendar export file
   - .fwx workflow export file
4. Click **Open**.
5. If a calendar with the same name already exists, you are asked whether you want to replace the existing calendar.

   Click **Yes** to replace the existing calendar with the same name. Click **No** to create a new calendar with a different name.
6. The calendar is imported.

Delete Calendar

To delete a calendar:

1. Select **Tools>Calendar Editor**. The **Calendar Editor** opens.
2. Select the desired calendar and click **Delete Calendar**. A prompt opens to confirm the delete.
3. Click **Yes** to proceed with the delete. The calendar is deleted.

Add Routes

A **route** is a path that moves work from one task to another, defining how and why a work item arrives at a particular task. A route is represented by a line in the workflow map. There are several route types as well as various display options.

See the following sections for instructions:

- Route Types
- Draw and Adjust Routes
- Route Display Options

Route Types

There are several route types:

LINE	TYPE
	Automatic Route Automatically routes work items to the next task.
	Single-Select Manual Route An end user in a user task marks a work item as done and manually selects one, and only one, path for a work item to go. For example, a user may choose to "approve" or "reject" a work item.
	Multi-Select Manual Route An end user in a user task marks a work item as done and manually selects one or more paths for a work item to go. For example, a user may choose to route a new hire form to "IT" and "Training" because the new hire needs a computer and training, but not "Security" because they are not given access to unlock the building.
	Optional Route An end user in a user task marks a work item as done and manually selects one or more, or none, of the optional paths for a work item to go. For example, a user may optionally choose to route a work item to their manager for further review.
	Conditional Route Routes a work item that meets the specified condition. For example, if an expense report approved by a manager is $1,000.00 or more it is sent to the boss before final approval, while another expense report less than $1,000.00 is approved without further review.
	Deadline Route Work items that have been in the task "too long" by reaching a specified deadline are routed away from the task. For example, tasks following a deadline route may be designed to makes sure these "late" work items get addressed.

	**Error Route** Routes a work item that went into error. For example, if a work item goes into error because a finishing touch failed then the work item is sent along the error route to tasks designed to make sure the error gets addressed.
	**Auto-Distribute Route** Distributes work items evenly across multiple tasks. For example, work items may be evenly distributed to John Smith, Jane Doe, and Joe Schmoe.
	**Information Route** A purely illustrative route that represents a path in the process that occurs outside the workflow or the flow of work between summarizing information tasks. For example, a page may be scanned before the start of the workflow and an email may be sent after the end of the workflow. Also, the path between information tasks summarizing various sections of the workflow could be illustrated.

Draw and Adjust Routes

To draw a route on the workflow map:

1. Select the desired route tool in the administrator toolbar.
2. Click on the origin task and drag the cursor over the destination task and release the mouse button. The route is drawn between the two tasks and the route arrow indicates the route direction.

   Tip: After adding routes, you can quickly switch back to the **Pointer** tool using **CTRL+1**.

To adjust a route:

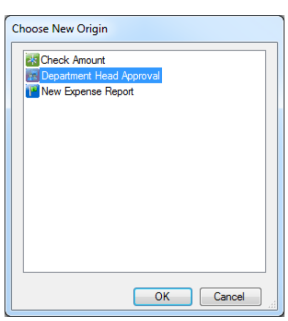
1. Use the **Pointer** tool to select the route. The route handles appear.
2. Click on an inner handle (not the start point or end point) and drag to the desired location.

To change the type of an existing route:

- Right click the route and under **Route Type** select the desired route type. The route is changed to the selected type.

To copy a route:

1. Right click the route and choose to **Copy to New Origin** task or **Copy to New Destination** task. The **Choose New** dialog opens.
2. Select the one or more tasks. To select multiple tasks use **CTRL+click** or **SHIFT+click**.



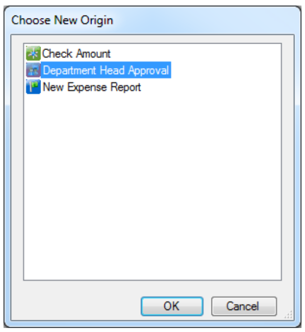
3. Click **OK**. The route is copied to the selected task(s).

To move a route:

1. Use the **Pointer** tool to select the route. The route handles appear.
2. Click the start point or end point, depending on whether you want to change the route's origin or destination, and drag the cursor over the desired task and release the mouse button. The route is moved.

Alternatively:

1. Right click the route and choose to **Move to New Origin** task or **Move to New Destination** task. The **Choose New** dialog opens.
2. Select the one or more tasks. To select multiple tasks use **CTRL+click** or **SHIFT+click**.



3. Click **OK**. The route is moved to the selected task(s).

Tip: If your routes are criss-crossing, getting too long, or otherwise cluttering up your map, try tidying it up with wormholes.

Route Display Options

To change the route style:

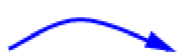
1. Right-click the route and under **Route Style** select one of the following:
   - **Polyline:** A straight or angular line with a directional arrow in the middle.

   - **Polyline with Destination Arrow:** A straight or angular line with a directional arrow in the middle and at the end.

   - **Bezier Curve:** A curving line with a directional arrow at the end.

     Note: A **Bezier Curve** style route does not visually "jump over" or "go under" intersecting routes.
2. If you selected a **Bezier Curve**, the line may need to be adjusted to have a curve. Adjust the route, clicking-and-dragging the handles, until there are three or more points and the line curves.

   Tip: Change the default route style for all routes using **View>Default Route Style**.

To show or hide a route label:

- Right-click the desired route and select **Hide Text** to hide the label or **Show Text** to show the label.

  To show or hide labels for multiple routes, use the **Pointer** tool to select multiple routes with **CTRL+click** and then right-click one of the selected routes and select **Hide Text** or **Show Text**.

  To show or hide all route labels in a workflow, first select **Edit>Select All Routes** then right-click a selected route and select **Hide Text** or **Show Text**.

  Tip: The view setting **View>Route Labels** may be used to toggle the display of all route labels across all workflows.

To change a route label's font, size, style, and color:

1. Right-click the desired route and select **Font**. The **Font** dialog opens.

   To change the label font for multiple routes, use the **Pointer** tool to select multiple routes with **CTRL+click** and then right-click one of the selected routes and select **Font**.

2. Choose the desired font options and click **OK**. The label font on the route(s) is changed.

   Tip: Change the default font for all text in all workflows using **View>Default Font**.

To view origin, destination, and other route information:

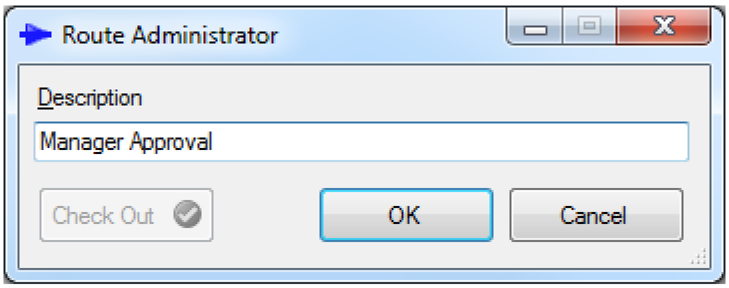
- Right-click the desired route and select **Route Information**. The **Route Information** dialog opens and displays the route's origin task, destination task, type, and description, which may be helpful to know if the route is quite long or arranged in such a way that this information is not immediately apparent visually in the workflow map.

Automatic Route

An **Automatic Route**  automatically routes work items to the next task.

To add an automatic route:

1. Select the **Automatic** route tool in the administrator toolbar.
2. Click on the origin task and drag the cursor over the destination task and release the mouse button. The route is drawn between the two tasks and the route arrow indicates the route direction.
3. Optionally set a route **Description**:
    a. Double-click the route. The **Route Administrator** opens.
    b. Enter a **Description**.



    c. Click **OK**. Your route description is saved.

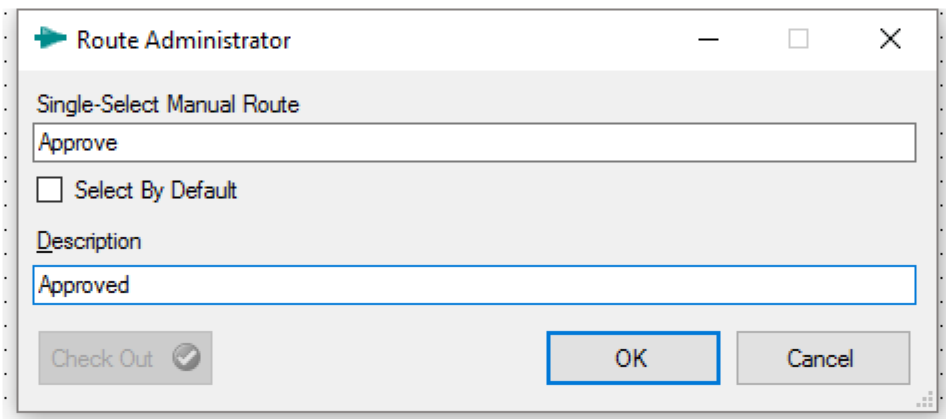
Single-Select Manual Route

A **Single-Select Manual Route** moves work items when an end user in a user task marks a work item as done and manually selects one, and only one, path for a work item to go. For example, a user may choose to "approve" or "reject" a work item.

Note: Single-select manual routes can only originate from user tasks.

To add a single-select manual route:

1. Select the **Single-Select Manual** route tool in the administrator toolbar.
2. Click on the origin task and drag the cursor over the destination task and release the mouse button. The route is drawn between the two tasks and the route arrow indicates the route direction.
3. Double-click the route. The **Route Administrator** opens.
4. Enter the **Single-Select Manual Route** option name, which the end user in the user task will see when choosing a route in the client (e.g. FDD, WebFDD).
5. Optionally turn on **Select By Default** which makes this the default or first choice when users are selecting routes in the client (e.g. FDD, WebFDD). Only one single-select route can be the default.
6. Optionally enter a **Description** (the end user does not see the description).



7. Click **OK**. The route is configured. The route line changes from dashed to solid, indicating the route is complete.

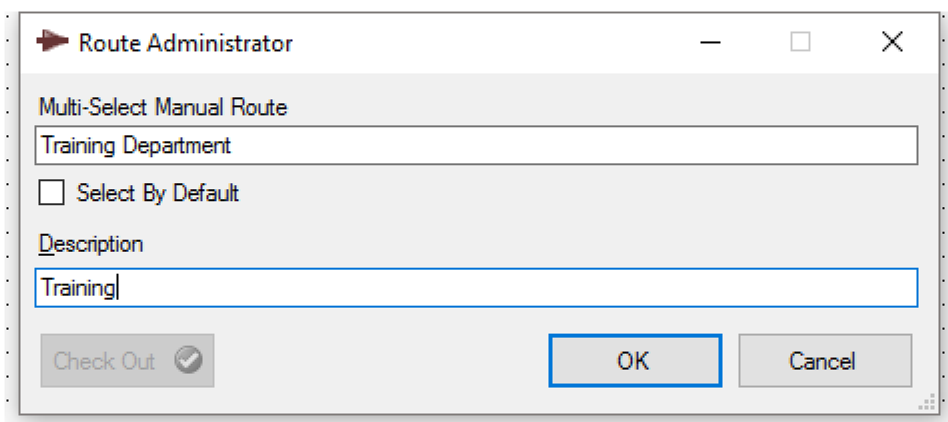
Multi-Select Manual Route

A **Multi-Select Manual Route**  moves work items when an end user in a user task marks a work item as done and manually selects one or more paths for a work item to go. For example, a user may choose to route a new hire form to "IT" and "Training" because the new hire needs a computer and training, but not "Security" because they are not given access to unlock the building.

Note: Multi-select manual routes can only originate from user tasks.

To add a multi-select manual route:

1. Select the **Multi-Select Manual** route tool in the administrator toolbar.
2. Click on the origin task and drag the cursor over the destination task and release the mouse button. The route is drawn between the two tasks and the route arrow indicates the route direction.
3. Double-click the route. The **Route Administrator** opens.
4. Enter the **Multi-Select Manual Route** option name, which the end user in the user task will see when choosing a route in the client (FDD or WebFDD).
5. Optionally turn on **Select By Default** which makes this the default or first choice when users are selecting routes in the client (e.g. FDD, WebFDD). One or more multi-select manual routes can be the default.
6. Optionally enter a **Description** (the end user does not see the description).



7. Click **OK**. The route is configured. The route line changes from dashed to solid, indicating the route is complete.

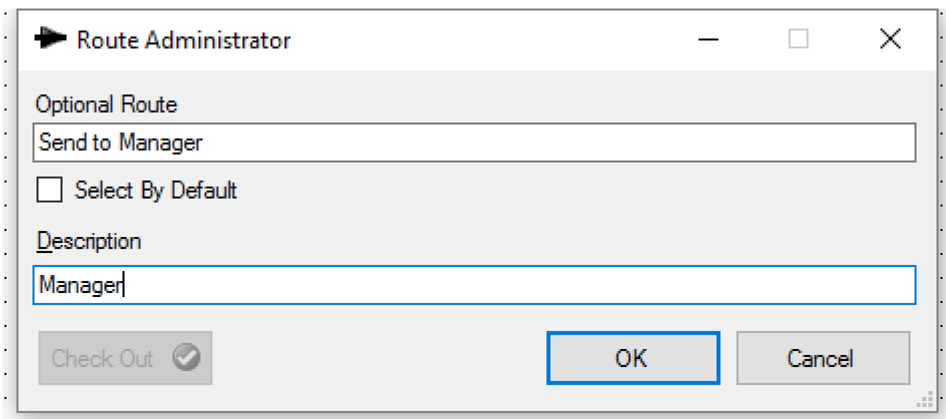
Optional Manual Route

An **Optional Route** moves work items when an end user in a user task marks a work item as done and manually selects one or more, or none, of the optional paths for a work item to go. For example, a user may optionally choose to route a work item to their manager for further review.

Note: Optional routes can only originate from user tasks.

To add an optional route:

1. Select the **Optional** route tool in the administrator toolbar.
2. Click on the origin task and drag the cursor over the destination task and release the mouse button. The route is drawn between the two tasks and the route arrow indicates the route direction.
3. Double-click the route. The **Route Administrator** opens.
4. Enter the **Optional Route** option name, which the end user in the user task will see when choosing a route in the client (FDD or WebFDD).
5. Optionally turn on **Select By Default** which makes this the default or first choice when users are selecting routes in the client (e.g. FDD, WebFDD). One or more optional routes can be the default.
6. Optionally enter a **Description** (the end user does not see the description).



7. Click **OK**. The route is configured. The route line changes from dashed to solid, indicating the route is complete.

Conditional Route

A **Conditional Route** routes a work item that meets the specified condition. For example, if an expense report approved by a manager is $1,000.00 or more it is sent to the boss before final approval, while another expense report less than $1,000.00 is approved without further review.

Note: Conditional routes based on list fields route work items as follows:

- If just one of the values in the list field meets the criteria, the work item meets the condition and will pass through the conditional route. For example, if a conditional route is configured to only route work items where **review_dates<4/14/2012**, a work item with the values **4/2/2012, 5/1/2012** will meet the condition and pass through the conditional route. The only exception to this rule is a "not equal to" condition (see next note).
- If a conditional route includes a "not equal to" condition (using the **<>** operator), and just one of the values in the List field does *not* meet the condition, the work item does *not* meet the condition and will *not* pass through that conditional route. For example, if a conditional route is configured to only route work items where **doc_states<>frozen**, a work item with the values **approved, frozen** does *not* meet the condition and will *not* pass through the conditional route.

To add a conditional route:

1. Select the **Conditional** route tool in the administrator toolbar.
2. Click on the origin task and drag the cursor over the destination task and release the mouse button. The route is drawn between the two tasks and the route arrow indicates the route direction.
3. Double-click the route. The **Route Administrator** opens.
4. Set the **Condition** or, alternatively, select **Other**. When a work item does not meet the condition of any other conditional route, it takes the **Other** conditional route.

   When setting the **Condition** you may **Create** a "constructed" condition or write the **SQL** yourself:

   - Create a "constructed" condition:

     a. Click **Create**. The **Edit Condition** dialog opens.

     b. Select the desired field or system value

     c. Select the desired operator. Operators include equal to **=**, not equal to **<>**, less than **<**, less than or equal to **<=**, greater than **>**, greater than or equal to **>=**, **IS** (NULL or NOT NULL), **IN** (SQL), **NOT IN** (SQL).

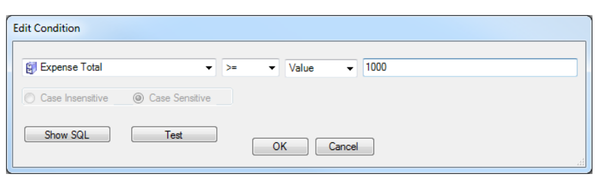
     d. Select whether you want to compare a **Value**, **Field**, **Function**, or **SQL**.

     e. If you selected to compare a **Value** or **SQL**, enter the value or SQL. If the field has a lookup table, you can select a value from the lookup values. If you selected to compare a **Field** or **Function**, select the field or function.

     f. Choose whether to check the value in a **Case Insensitive** or **Case Sensitive** manner.

     Tips:

     - Click **Test** to see if your condition works.
     - Click **Show SQL** to switch to the SQL view. Note that if you make changes in the SQL view, you cannot go back to the "constructed" condition unless you revert the SQL.



g. Click **OK**. The condition is added.

h. Optionally add more conditions by clicking **And** or **Or**. You can add more criteria to an **and** or **or** statement by selecting **and** or **or** and clicking **Add**.

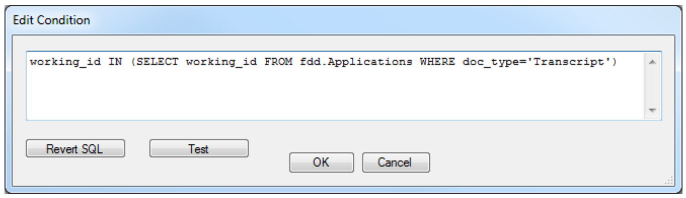
You can change an existing **and** to and **or**, or vice versa, by double-clicking the **and** or **or** and changing it to the desired operator in the **And or Or** dialog.

Modify or **Delete** conditions as needed.

- Enter a SQL condition:

a. Click **SQL**. The **Edit Condition** dialog opens.

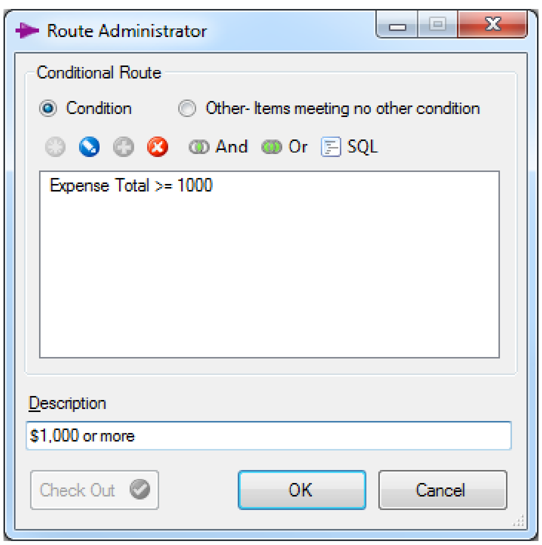
b. Enter a SQL condition.



Note: The table referenced in the above SQL is not in the standard Feith FDD Schema but is used only for the purpose of this example.

c. Click **OK**. The condition is added.

5. Optionally enter a **Description**.



6. Click **OK**. The route is configured. The route line changes from dashed to solid, indicating the route is complete.

Note: To use a table or view other than the base file cabinet in a conditional route's SQL, write your SQL as part of the "implied" conditional route query:

select count(*) from *[file cabinet workflow is based on]* where *[unique ID]* = *[ID of work item]* and *[your condition from Workflow iQ Manager]*

Deadline Route

A **Deadline Route** moves work items that have been in the task "too long" by reaching a specified deadline. For example, tasks following a deadline route may be designed to makes sure these "late" work items get addressed.

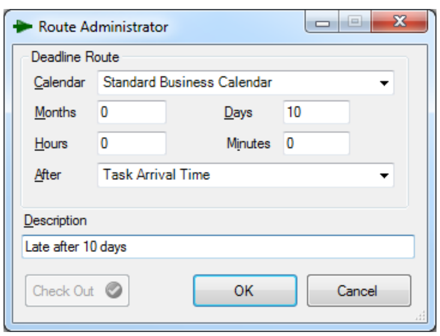
The deadline assigned by a Deadline Route is also known as a "Task Deadline", since the deadline applies to the task from which the route originates.

If you want to set a deadline for the entire workflow, see Deadline Task for more information.

Note: Deadline routes cannot originate from deadline tasks.

To add a deadline route:

1. Select the **Deadline** route tool in the administrator toolbar.
2. Click on the origin task and drag the cursor over the destination task and release the mouse button. The route is drawn between the two tasks and the route arrow indicates the route direction.
3. Double-click the route. The **Route Administrator** opens.
4. Select the **Calendar** on which to base the deadline.
5. Enter the deadline time in **Months**, **Days**, **Hours**, and/or **Minutes**.
6. In the **After** field, select the system or file cabinet field date and/or time you want to reference to start counting down to the deadline.
7. Optionally enter a **Description**.



8. Click **OK**. The route is configured. The route line changes from dashed to solid, indicating the route is complete.

Note: Using the interval of **Months**, **Days**, **Hours**, and/or **Minutes** and the **After** reference date, Rex calculates the future deadline date and time in the following sequence:

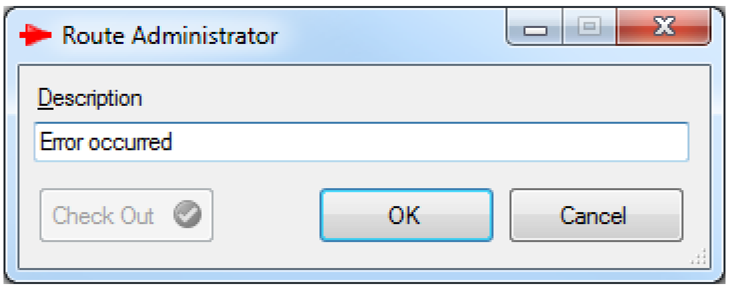
1. Rex counts forward the given number of **Months**, taking into account changes in the year and the day of the month (based on the available days in the determined month). The time of day does *not* change and stays the same time as the **After** reference date.
2. Rex counts forward the given number of **Days**, taking into account the **Work Week** business days of the selected **Calendar**. The time of day does *not* change and stays the same time as the **After** reference date.
3. Rex counts forward the given number of **Hours**, taking into account the **Business Hours** of the **Work Week** in the selected **Calendar**.
4. Rex counts forward the given number of **Minutes**, taking into account the **Business Hours** of the **Work Week** in the selected **Calendar**.

Error Route

An **Error Route** routes a work item that went into error. For example, if a work item goes into error because a finishing touch failed then the work item is sent along the error route to tasks designed to make sure the error gets addressed.

To add an error route:

1. Select the **Error** route tool in the administrator toolbar.
2. Click on the origin task and drag the cursor over the destination task and release the mouse button. The route is drawn between the two tasks and the route arrow indicates the route direction.
3. Optionally set a route **Description**:
    a. Double-click the route. The **Route Administrator** opens.
    b. Enter a **Description**.



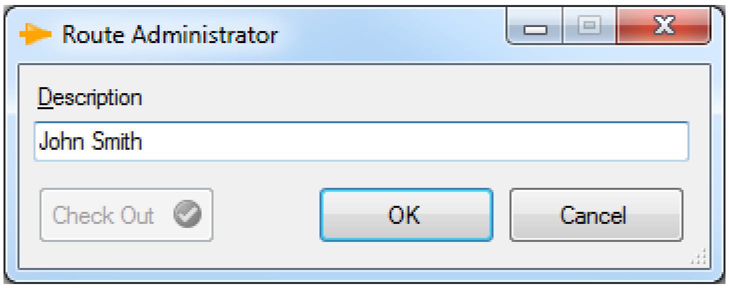
    c. Click **OK**. Your route description is saved.

Auto-Distribute Route

An **Auto-Distribute Route** distributes work items evenly across multiple tasks. For example, work items may be evenly distributed to John Smith, Jane Doe, and Joe Schmoe.

To add an auto-distribute route:

1. Select the **Auto-Distribute** route tool in the administrator toolbar.
2. Click on the origin task and drag the cursor over the destination task and release the mouse button. The route is drawn between the two tasks and the route arrow indicates the route direction.
3. Optionally set a route **Description**:
    a. Double-click the route. The **Route Administrator** opens.
    b. Enter a **Description**.



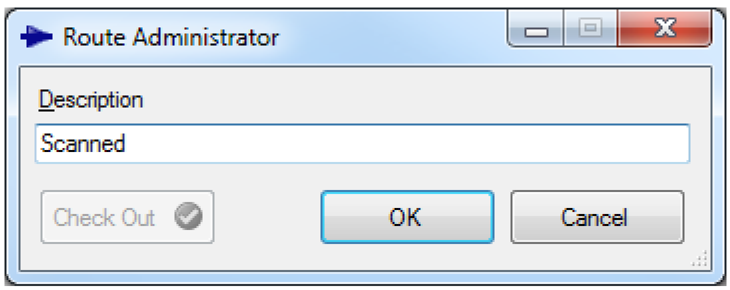
    c. Click **OK**. Your route description is saved.

Information Route

An **Information Route** is a purely illustrative route that represents a path in the process that occurs outside the workflow or the flow of work between summarizing information tasks. For example, a page may be scanned before the start of the workflow and an email may be sent after the end of the workflow. Also, the path between information tasks summarizing various sections of the workflow could be illustrated.

To add an information route:

1. Select the **Information** route tool in the administrator toolbar.
2. Click on the origin task and drag the cursor over the destination task and release the mouse button. The route is drawn between the two tasks and the route arrow indicates the route direction.
3. Optionally set a route **Description**:
    a. Double-click the route. The **Route Administrator** opens.
    b. Enter a **Description**.

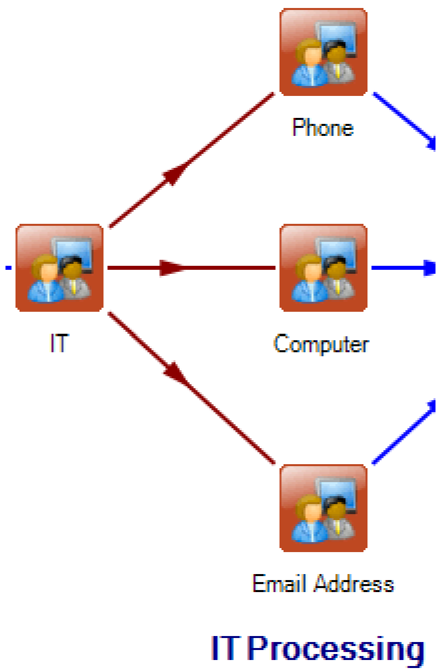


    c. Click **OK**. Your route description is saved.

Add Graphical Elements

Text

Use **Text** T for supplemental labeling or as a visual aid in the workflow map.



To add text:

1. Select the **Text** tool in the administrator toolbar.
2. Click on the workflow map. The text element is added.
3. Type the desired text. Enter multiple lines of text using **CTRL+ENTER**. While editing, right-click in the text element to **Select All** or **Paste** text from the clipboard.

   Use the **BACKSPACE** key to delete text. You may also highlight text and hit **BACKSPACE** or **DELETE**.

   Hit **ESC** or **TAB** to exit edit mode.
4. Optionally move the text using click-and-drag or the arrow keys.

To change the text font, size, style, and color:

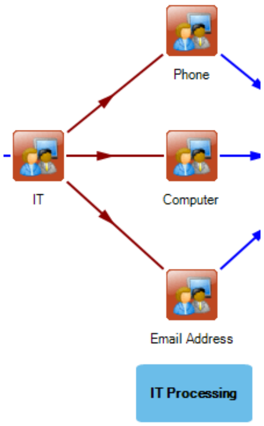
1. Right-click the text and select **Font**. The **Font** dialog opens.

   To change the font for multiple text elements, use the **Pointer** tool to select multiple text elements by clicking-and-dragging a selection box around the desired text elements or using **CTRL+click** and then right-clicking one of the selected text elements and selecting **Font**.
2. Choose the desired font options and click **OK**. The text font is changed.

Tip: Change the default font for all text in all workflows using **View>Default Font**.

Label

Use a **Label** for supplemental labeling or as a visual aid in the workflow map.



To add a label:

1. Select the **Label** tool in the administrator toolbar.
2. Click on the workflow map to add the label. The label is added.
3. Optionally double-click the label to add text. Enter multiple lines of text using **CTRL+ENTER**. While editing, right-click in the label to **Select All** or **Paste** text from the clipboard.

   Use the **BACKSPACE** key to delete text. You may also highlight text and hit **BACKSPACE** or **DELETE**.

   Hit **ESC** or **TAB** to exit edit mode.
4. Optionally resize the label by selecting it and clicking-and-dragging its handles.
5. Optionally move the label using click-and-drag or the arrow keys.

To change the label fill color:

1. Right-click the label and select **Fill Color**. The **Color** dialog opens.

   To change the color for multiple labels, use the **Pointer** tool to select multiple labels by clicking-and-dragging a selection box around the desired labels or using **CTRL+click** and then right-clicking one of the selected labels and selecting **Fill Color**.
2. Choose the desired color and click **OK**. The label fill color is changed.

To change the label text font, size, style, and color:

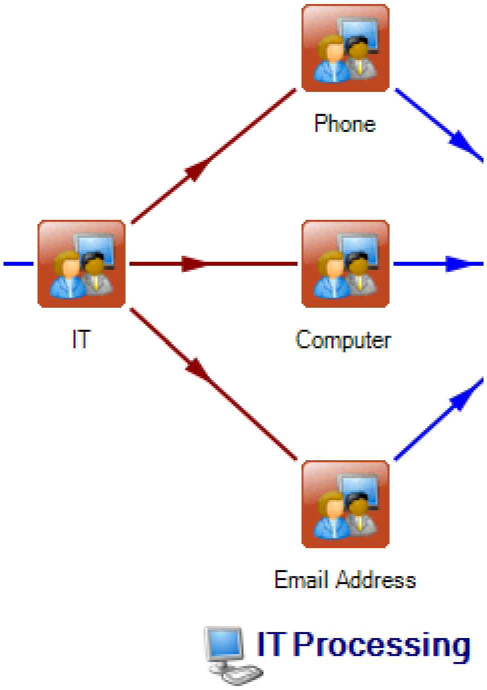
1. Right-click the label and select **Font**. The **Font** dialog opens.

   To change the font for multiple labels, use the **Pointer** tool to select multiple labels by clicking-and-dragging a selection box around the desired labels or using **CTRL+click** and then right-clicking one of the selected labels and selecting **Font**.
2. Choose the desired font options and click **OK**. The label font is changed.

Tip: Change the default font for all text in all workflows using **View>Default Font**.

Picture

Use a **Picture** for supplemental labeling or as a visual aid in the workflow map.



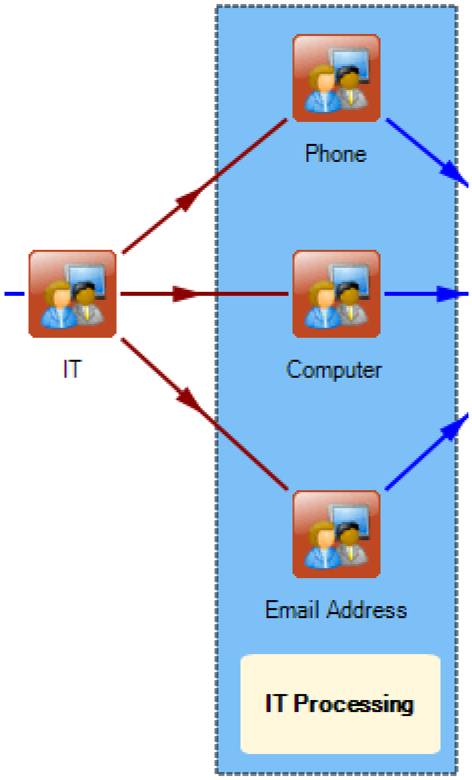
To add a picture:

1. Select the **Picture** tool in the administrator toolbar.
2. Click on the workflow map to add the picture. The picture is added with a placeholder image.
3. Double-click the picture. The **Open** dialog opens.
4. Select the desired image file and click **Open**. The image file is put into the picture.

   Note: It is recommended to use small images. Workflow iQ Manager will shrink any large images, though you may resize them afterward if desired.
5. Optionally resize the picture by selecting it and clicking-and-dragging its handles.
6. Optionally move the picture using click-and-drag or the arrow keys.

Box

Use a **Box** to visually group tasks in the workflow map.



To add a box:

1. Select the **Box** tool in the administrator toolbar.
2. Click on the workflow map and drag to draw a box. The box is added.
3. Optionally move the box using click-and-drag or the arrow keys.

To change the box fill color:

1. Right-click the box and select **Fill Color**. The **Color** dialog opens.
2. Choose the desired color and click **OK**. The box fill color is changed.

To change the box back to transparent, right-click the box and select **Transparent**.

To change the box outline's width:

- Right-click the box and under **Line Width** select the desired width. The box outline's width changes.

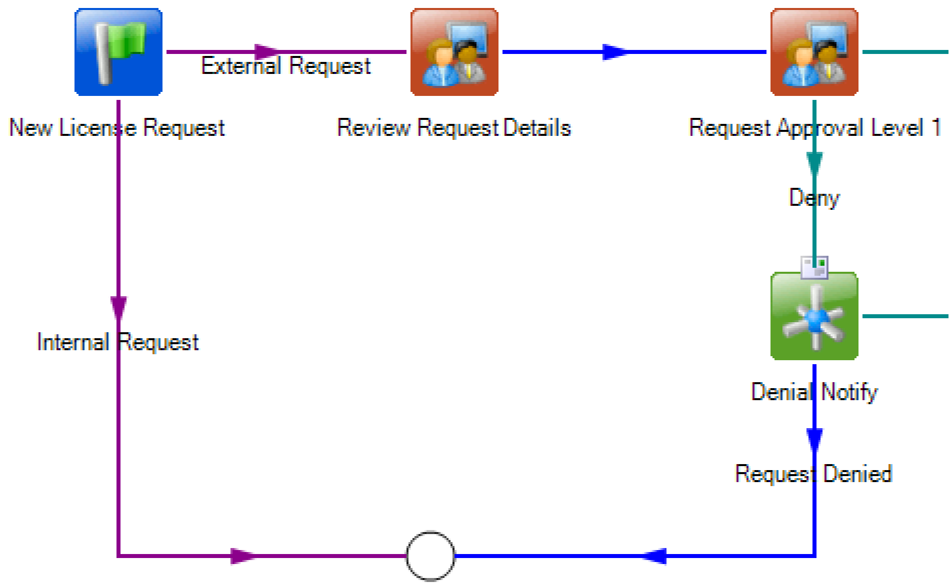
To change the box outline's style:

- Right-click the box and under **Line Style** select the desired style as **Solid**, **Dashed**, or **Dotted**. The box outline's style changes.

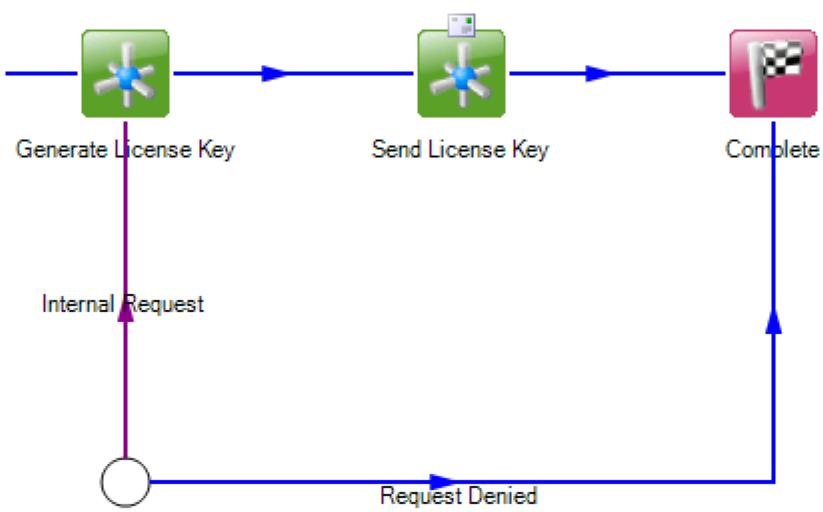
Wormhole

Use a wormhole to tidy up criss-crossing or long routes that are cluttering your map.

For example, here is the beginning of a workflow and the first half of some routes going into a wormhole. These routes need to bypass a bunch of steps in the workflow.



Here, near the end of the workflow, the routes re-emerge to finish processing documents that bypassed most of the workflow.



To add a wormhole:

1. Select the **Wormhole** tool in the administrator toolbar.
2. Click on the workflow map to add the wormhole. The wormhole is added.
3. Draw the first half of the route from a task to the wormhole. The route is dashed (no matter what type it is) and the wormhole is pink to indicate that the route is not yet complete.
4. Scroll over to another wormhole. You may choose *any* other wormhole, but you can only choose *one* other wormhole where you will complete the route.
5. Draw the second half of the route from the wormhole to a task. The route is completed and can be configured as usual.

To split an existing route through a wormhole:

- Right-click the route and select **Split**. The route it split into two halves with wormholes on both ends. Move the wormholes as desired.

To find the other end of a route that goes through a wormhole:

- Right-click the route and select **Find Other End**. You are scrolled over to the other half of the route, which is selected for you.

To remove a route from a wormhole:

- Right-click the route and select **Remove from Wormhole**. The route is removed from the wormhole and goes from task to task as usual.

Save, Publish, and Maintain Workflows

Workflow and Version Status

The workflow status and workflow version status indicate where the workflow and its versions are or have been in the development and maintenance processes.

Workflow Status

The status of a workflow is one of the following:

- **In Development:** The workflow is still being designed and has not yet been published and therefore is not yet in production.
- **Live:** The workflow has been published and is in production. See Publish Workflow for more information.
- **Deleted:** The workflow publication has been deleted and is no longer in production. See Delete Workflow for more information.

Version Status

The status of a workflow version is one of the following:

- **Current:** The current published version of the workflow that is in production.
- **Retired:** A previously published version of the workflow that used to be in production.
- **Non-Published:** A checked in version that is not in production. A non-published version may be created by a user checking in a version (see Check In Version for more information) or a user's check out being overridden (see Override Check Out for more information).
- **Information:** A version with no associated map that is sometimes created under certain circumstances (e.g. overriding the check out on a brand new workflow with no changes at all).

See Version History for more information on accessing workflow versions.

Workflow Permissions

In order to create, open, check out, modify, publish, import, delete, or purge workflows, you must have the necessary permissions.

Many of these permissions, such as task permissions and database user type, are set in Feith Control Panel. See **Feith Control Panel User Guide** for more information.

See the following for more information on what permissions are needed to:

- Open Workflow
- Create New Workflow and Check Out Workflow
- Publish Workflow and Import Workflow
- Delete Workflow
- Purge Workflow

Open Workflow

- To **Open** any workflow in Workflow iQ Manager at all, you must have the **View Workflow** task permission. Task permissions are set in Feith Control Panel.
- To **Open** a specific workflow, at least one of the following must apply to you:
    - You are a member of that workflow's **Administration Group**. See Workflow Properties for more information.
    - You are included in that **Workflow's Permissions** list.

      To assign groups and users in the workflow permissions list:

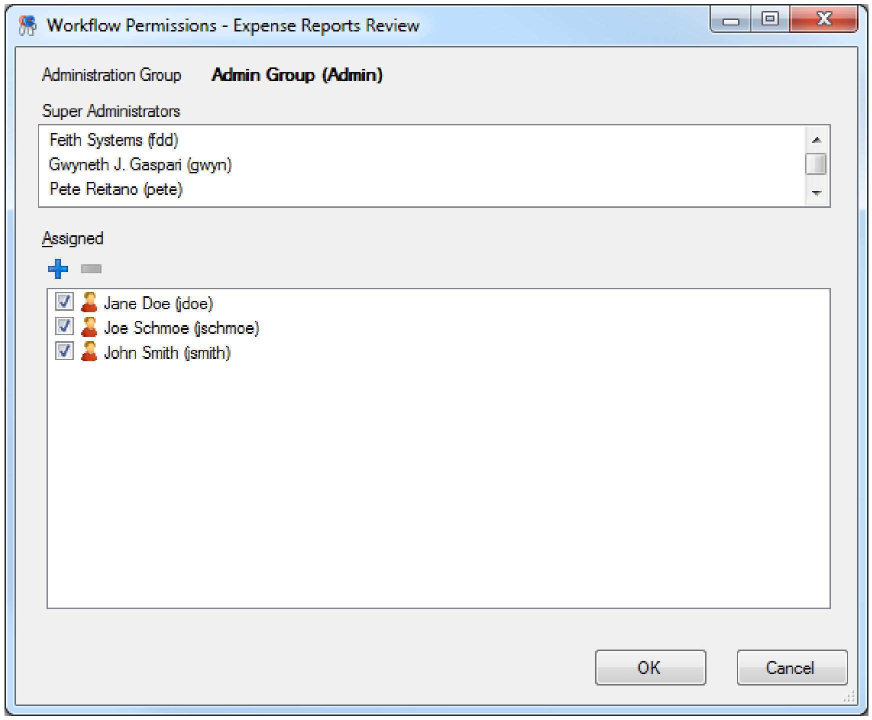
      a. **Open a Workflow** . See Open Workflow for more information.

      b. Click **Workflow Permissions** in the standard toolbar. The **Workflow Permissions** dialog opens, displaying the **Administration Group** (members of which can open the workflow), **Super Administrators** (who can open *all* workflows), and **Assigned** users (if any).

      c. Click **Show All Selectable Groups and Users** . All workflow users and groups with members that are workflow users are displayed in the list.

      d. Check the desired groups and users.

      Tip: In the group/user list hit the key of the first letter of the group/user name to jump to that part of the list. Hit the letter key multiple times to cycle through all groups/users that start with that letter. Also, use the up and down arrow keys to navigate in the group/user list.



e. Click **OK**. Your workflow permissions assignment is saved.

- You are a **Super Administrator** user. Super administrator users can open *all* workflows. Super administrators are set in Feith Control panel.

Create New Workflow and Check Out Workflow

In order to **Create a New Workflow** or **Check Out a Workflow** for modifying you must have the **Workflow Administration** task permission. Task permissions are set in Feith Control Panel.

Publish Workflow and Import Workflow

In order to publish or import a workflow, you must be a **Feith Admin** user (on Oracle) or a **Database Admin** user (on MS SQL Server). Database user type is set in Feith Control Panel.

If you are instead a **Feith Connect** user, although you cannot publish you may instead **Check In a Version**. See Check In Version for more information.

Delete Workflow

In order to **Delete a Workflow** publication, you must:

- Have the **Workflow Administration** task permission. Task permissions are set in Feith Control Panel.
- Be a **Feith Admin** user (on Oracle) or a **Database Admin** user (on MS SQL Server). Database user type is set in Feith Control Panel.

Purge Workflow

In order to **Purge a Workflow**, you must:

- Have the **Modify/Delete from Version History** and **Workflow Administration** task permissions. Task permissions are set in Feith Control Panel.
- Be a **Feith Admin** user (on Oracle) or a **Database Admin** user (on MS SQL Server). Database user type is set in Feith Control Panel.

  Note: If the workflow publication has already been deleted (see Delete Workflow for more information), then a **Feith Connect** user may purge the workflow.

Workflow Properties

The **Workflow Properties** are the basic settings of the workflow and configured when the workflow is first created. See Create a New Workflow for more information.

The workflow properties include:

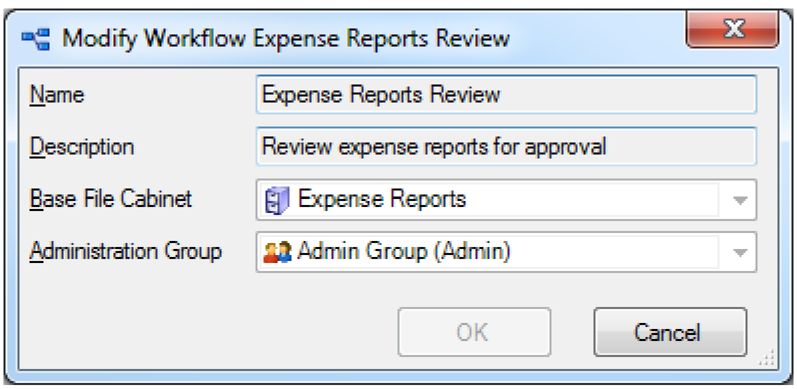
- Workflow **Name**. The name may be up to 32 characters long.
- Workflow **Description**. The description may be up to 128 characters long.
- Workflow's **Base File Cabinet** which contains the FDD documents you want to process through the workflow.
- Workflow's **Administration Group** whose members may open the workflow in Workflow iQ Manager and see the workflow's admin file cabinet in the clients, as well as receive an email from Rex when an error occurs in the workflow (see Errors for more information).

  Tip: You may grant users not in the administration group access to the workflow in Workflow iQ Manager using **Workflow Permissions**. See Workflow Permissions for more information.

File cabinets, groups, and users are created in Feith Control Panel. See **Feith Control Panel User Guide** for more information.

To view a workflow's properties:

1. **Open a Workflow**. See Open Workflow for more information.
2. Click **Workflow Properties** in the standard toolbar. The workflow properties open, displaying the workflow's **Name**, **Description**, **Base File Cabinet**, and **Administration Group**.



To modify a workflow's properties:

1. **Open a Workflow**. See Open Workflow for more information.
2. **Check Out the Workflow**. See Modify Workflow for more information.
3. Click **Workflow Properties** in the standard toolbar. The workflow properties open.
4. Modify the workflow's **Name**, **Description**, and **Administration Group** as needed.

   Note: The workflow's **Base File Cabinet** cannot be modified. You can export and import the workflow design if you want to re-use it on another base file cabinet. See Export and Import for more information.
5. Click **OK**. The workflow properties are saved.
6. **Publish the Workflow** for your changes to take effect. See Publish Workflow for more information.

Workflow Bookmarks

Bookmark your favorite workflows or bookmark a group of workflows that go together, then select the bookmark to open all its workflows at once. Bookmarks are helpful when you have several workflows to manage.

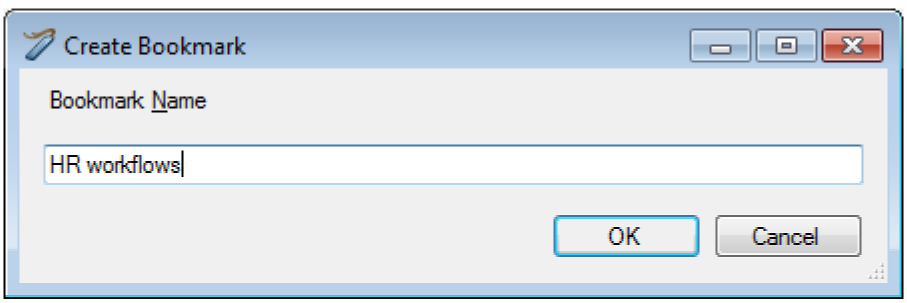
See the following sections for instructions:

- Create Bookmark
- Open Bookmark
- Reorder Bookmarks
- Rename Bookmark
- Delete Bookmark

Create Bookmark

To create a bookmark:

1. Open the workflows that you want to be in the bookmark. See Open Workflow for more information.
2. Select **File>Workflow Bookmarks>Create Bookmark**. The **Create Bookmark** dialog opens.
3. Enter the **Bookmark Name**.



4. Click **OK**. The bookmark is created and contains all the workflows you had open.

Open Bookmark

To open a bookmark:

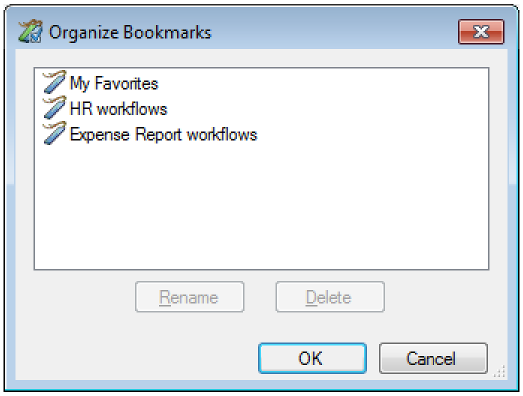
- Select **File>Workflow Bookmarks** then select your bookmark in the list. All workflows in the bookmark are opened.

Reorder Bookmarks

You can reorder bookmarks to change the order in which they display in the **Workflow Bookmarks** list.

To reorder bookmarks:

1. Select **File>Workflow Bookmarks>Organize Bookmarks**. The **Organize Bookmarks** dialog opens.

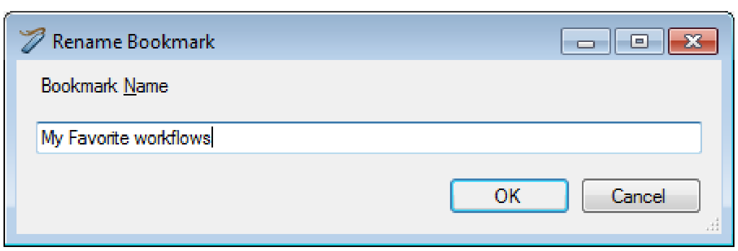


2. Select a bookmark then click-and-drag it up or down to your desired location.
3. Click **OK**. The bookmarks are reordered in the **Workflow Bookmarks** list under the **File** menu.

Rename Bookmark

To rename a bookmark:

1. Select **File>Workflow Bookmarks>Organize Bookmarks**. The **Organize Bookmarks** dialog opens.
2. Select a bookmark then click **Rename**. The **Rename Bookmark** dialog opens.
3. Enter the new **Bookmark Name**.



4. Click **OK**. The bookmark is renamed.
5. Click **OK** to close the **Organize Bookmarks** dialog and save your changes.

Delete Bookmark

To delete a bookmark:

1. Select **File>Workflow Bookmarks>Organize Bookmarks**. The **Organize Bookmarks** dialog opens.
2. Select a bookmark then click **Delete**. The bookmark is deleted.
3. Click **OK** to close the **Organize Bookmarks** dialog and save your changes.

Open Workflow

Open a Workflow to view it for monitoring or check it out for modifying. See Monitor Workflows and Modify Workflow for more information.

See Version History for information on how to open old retired or non-published workflow versions. See Save and Restore Backup Files for information on restoring a workflow from a backup .fwf file.

Note: In order to open a workflow you must have the necessary permissions. See Workflow Permissions for more information.

To open a workflow:

1. Click **Open Workflow** in the standard toolbar. The **Open Workflow** dialog opens.

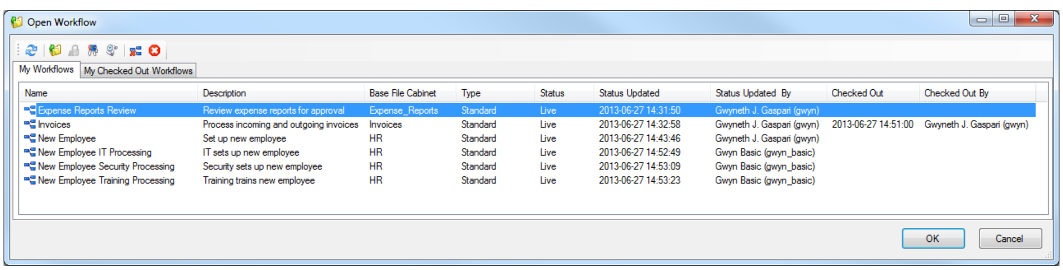
   View all workflows you can access in the **My Workflows** tab or view workflows you have checked out in the **My Checked Out Workflows** tab (see Modify Workflow for more information on **Checked Out** workflows).

   Note: A **System** workflow with a yellow icon is a specialized workflow created by Feith and it is not recommended to make changes to a system workflow.

   Tip: Alternatively, select a workflow bookmark you created under **File>Workflow Bookmarks**. All the workflows in that bookmark will be opened. See Workflow Bookmarks for more information.

2. Select one or more workflows to open. Select multiple workflows using **SHIFT+click** or **CTRL+click**.

   See Workflow and Version Status for more information on the **Status** of a workflow. See Modify Workflow for more information on **Checked Out** workflows.



3. The workflow(s) is opened and the workflow tab(s) displays on the top of the screen. See The Workflow Tabs for more information on using and arranging the workflow tabs.

   Workflows display as follows:

   - A workflow in "read-only" mode may be monitored. See Monitor Workflows for more information. A workflow is read-only when it has not been checked out. All operations for modifying the workflow are disabled and only the navigational tools are available in the administrator toolbar.

   - A workflow that you have checked out may be modified. A checked out workflow is indicated by a checkmark icon in the workflow tab, the map grid displaying, and the full tool set available in the administrator toolbar. See Modify Workflow for more information.

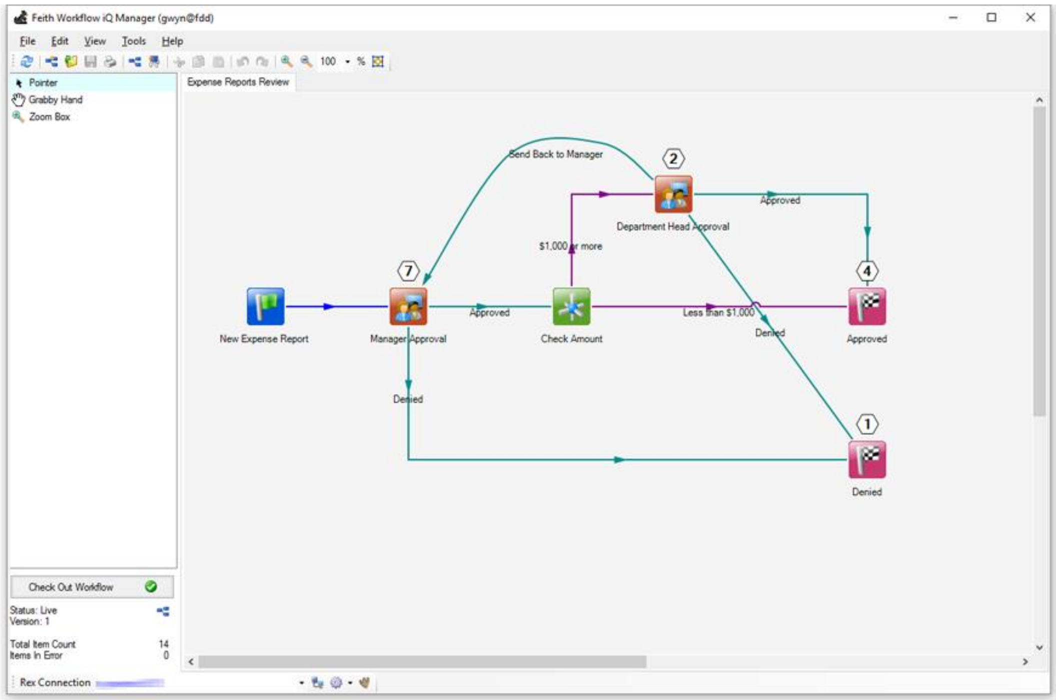
Modify Workflow

Check Out a Workflow to modify its design, adapting it to the changing requirements of your business process.

Note: In order to modify a workflow you must have the necessary permissions. See Workflow Permissions for more information.

1. **Open a Workflow**. See Open Workflow for more information.

   Note: Before the workflow is checked out for modifying, it is in "read-only" mode with all operations for modifying the workflow disabled and only the navigational tools available in the administrator toolbar.

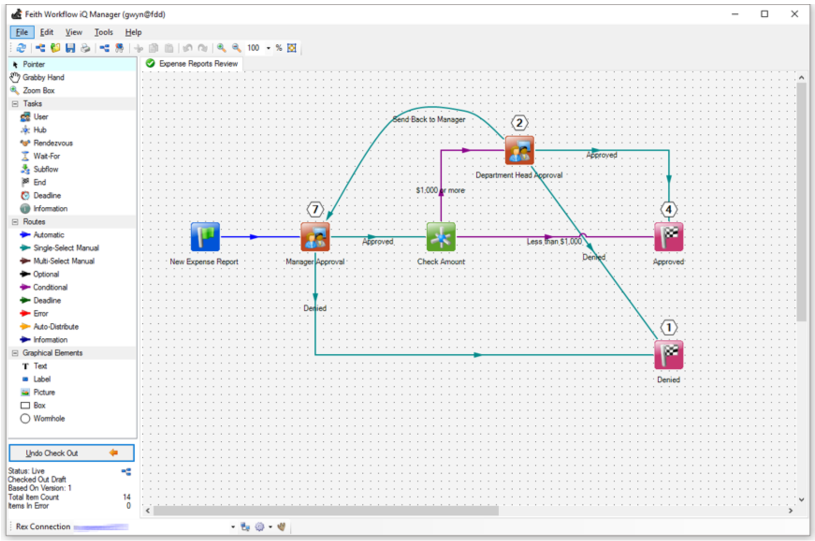


2. Click **Check Out Workflow** on the admin button in the administrator toolbar. The workflow is checked out for editing, indicated by a checkmark icon in the workflow tab, the map grid displaying, and the full tool set available in the administrator toolbar. The workflow is locked by you and cannot be checked out by other users.

   Notes:

   - If you are prompted that another user has the workflow checked out and locked already, you cannot modify the workflow. If necessary, you can override the other user's check out (see Override Check Out for more information).

   - If you are prompted that a newer version of the workflow is available, you may opt to make your modifications to the newer version.
   - If you are prompted that the workflow is a system workflow - a specialized workflow created by Feith - it is not recommended to make changes to such a workflow.

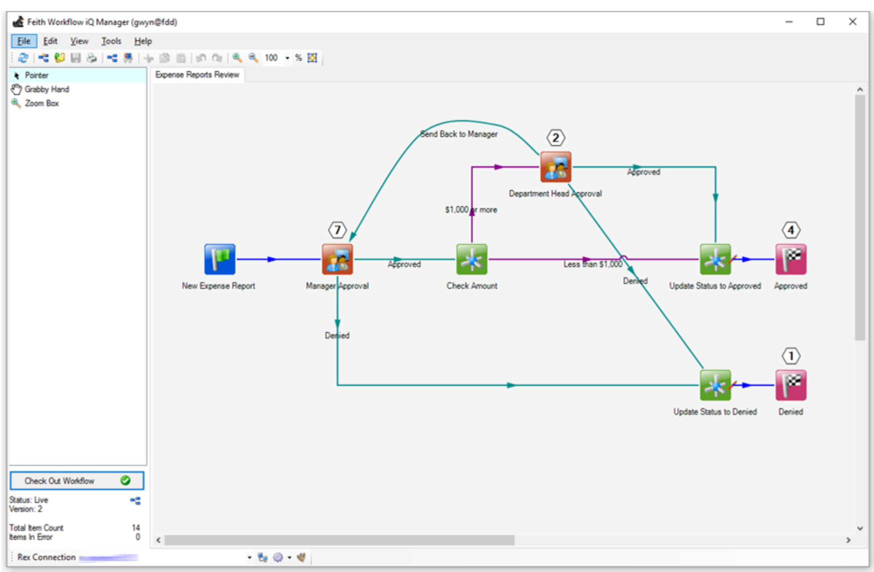


3. Modify the workflow design as needed. See Add Tasks, Add Routes, and Add Graphical Elements for more information.

   As you make changes, click **Save Draft** to save a personal draft of your workflow. If you want another user to see or work on the workflow in development, you can select **File>Check In Version** to make a non-published version of the workflow available for them to access. See Save Workflow and Check In Version for more information.

4. When you are finished modifying the workflow and ready to put the changes into production, **Publish the Workflow**. See Publish Workflow for more information.

   Note: If when modifying the workflow you deleted any tasks containing work items, during the publication process you will be prompted with the **Move Work** dialog to move the work items to another task. Optionally check **Use for All Deleted Tasks** to move work from all deleted tasks to the same task.



It is strongly recommended that you do *not* publish modifications to an in-production workflow while users are working in the FDD system.

Save Draft

Save a Personal Draft of the workflow with your changes, even with incomplete tasks and routes.

Note: A draft is a personal workflow map with your changes that only you can see, it is not added to the workflow's version history, and it is not in production in the FDD system.

If you want to save the workflow map with your changes as a non-published version in the workflow version history or let another user to see or work on the workflow version with your changes, **Check in a Version**. See Check In Version for more information.

If you want to put the workflow with your changes into production, **Publish** the workflow. See Publish Workflow for more information.

To save a personal draft of the workflow with your changes

- Click **Save Draft** on the standard toolbar. The workflow draft is saved and remains checked out and locked by you.

  Tip: Use the keyboard shortcut **CTRL+S** to save a draft.

Check In Version

Check in a Non-Published Version of the workflow with your changes, even with incomplete tasks and routes, to the workflow's version history. See Version History for more information.

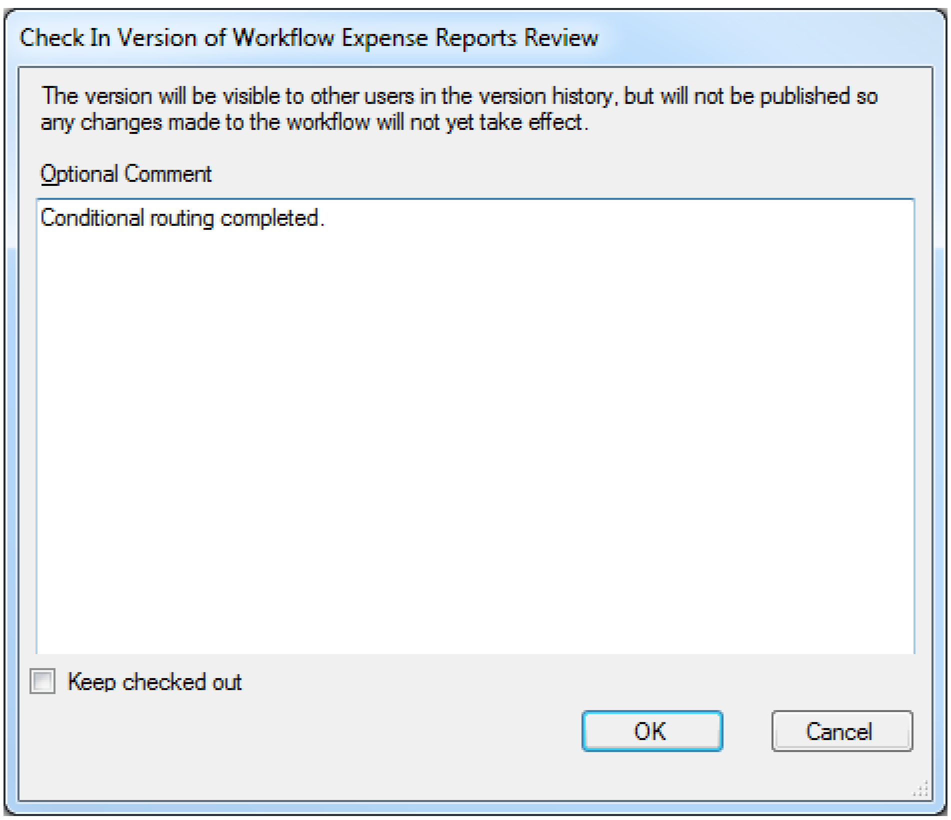
Note: A checked in version is added to the workflow's version history as a non-published version, is available to other users to see or work on the workflow version with your changes, and it is not in production in the FDD system.

If you want to save a personal draft with your changes that only you can see and is not in the workflow's version history, **Save a Draft**. See Save Draft for more information.

If you want to put the workflow with your changes into production, **Publish** the workflow. See Publish Workflow for more information.

To check in a non-published version of the workflow with your changes:

1. Select **File>Check in Version**. The **Check In Version** dialog opens.
2. Enter a comment on the workflow version and, if desired, check **Keep checked out** to keep the workflow checked out after the check in to the workflow's version history.



3. Click **OK**. A non-published version of the workflow with your changes is added to the workflow's version history. See Version History for more information.

   If you chose to keep the workflow checked out, it remains checked out and locked by you.

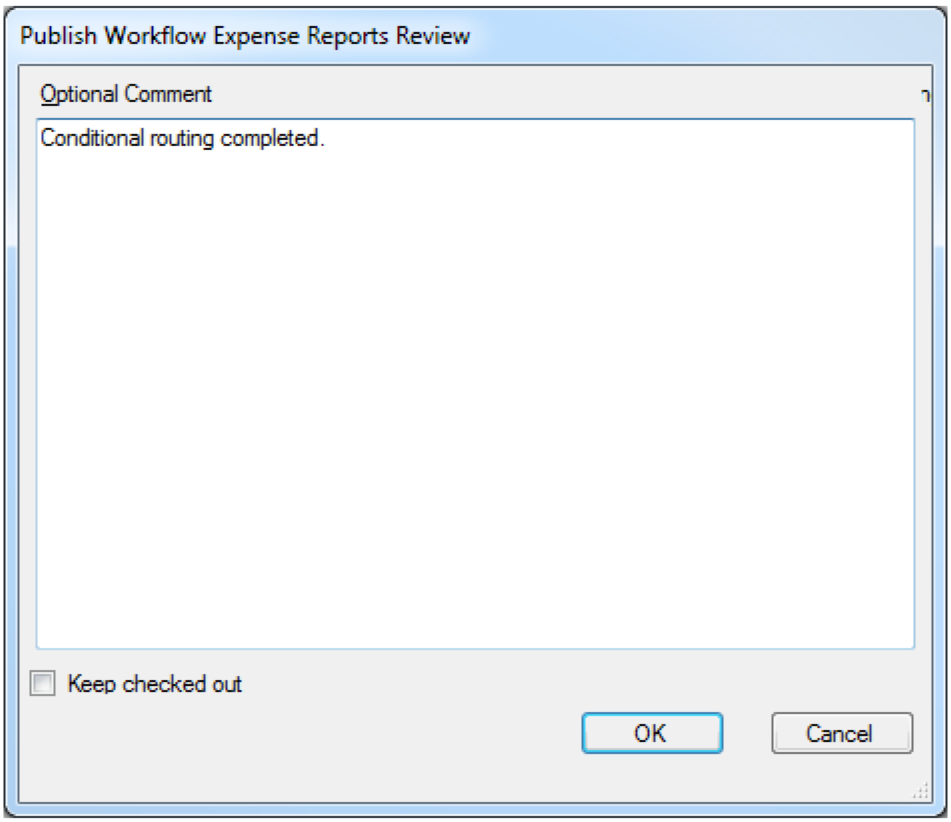
Publish Workflow

Publish a Workflow to put it into production in the FDD system. Once a workflow is published, work items go into it and processing begins.

See Modify Workflow for more information on modifying a workflow design. See Delete Workflow for more information on taking a workflow out of production.

To publish a workflow:

1. Once a workflow design is complete and ready to go into production, click **Publish Workflow** on the admin button in the administrator toolbar. The **Publish Workflow** dialog opens.
2. Enter a comment on the workflow version and, if desired, check **Keep checked out** to keep the workflow checked out after the publish.



3. Click **OK**. The workflow publishing process begins and shows a progress bar for each step taken until the publish is completed and the workflow is in production.

   If you chose to keep the workflow checked out, it remains checked out and locked by you.

   Note: If there are any incomplete tasks or routes, you will be prompted to complete their configuration when attempting to publish the workflow. Once all tasks and routes are complete, then publish the workflow.

Clone Workflow

Clone an existing workflow design to create a new workflow.

To clone a workflow:

1. **Open a Workflow**. See Open Workflow for more information.
2. Select **File>Clone Workflow**. The **Create New Workflow** dialog opens.
3. Modify the workflow clone's **Name**, **Description**, and **Administration Group** as needed.

   Note: The workflow's **Base File Cabinet** cannot be modified. You can export and import the workflow design if you want to re-use it on another base file cabinet. See Export and Import for more information.
4. Click **OK**. The clone workflow is created.
5. Modify the workflow design as needed. See Add Tasks, Add Routes, and Add Graphical Elements for more information.
6. When you are ready to put the new workflow into production, **Publish the Workflow**. See Publish Workflow for more information.

Version History

Version History contains all versions that have existed for a workflow.

See the following sections for instructions:

- View Version History
- Open Version
- Check Out Version for Republication
- Edit Version Comment
- Delete Version

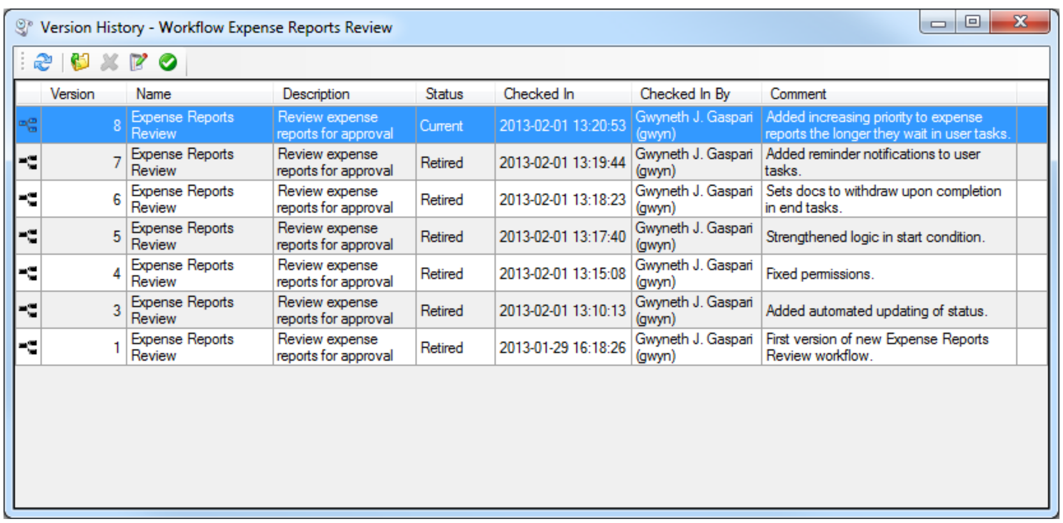
View Version History

To view a workflow's version history:

1. Click **Open Workflow** in the standard toolbar. The **Open Workflow** dialog opens.

   View all workflows you can access in the **My Workflows** tab or view workflows you have checked out in the **My Checked Out Workflows** tab (see Modify Workflow for more information on **Checked Out** workflows).

2. Select the desired workflow and click **Show Version History**. The **Version History** opens and displays all workflow versions. See Workflow and Version Status for more information on the **Status** of a version.



Version	Name	Description	Status	Checked In	Checked In By	Comment
8	Expense Reports Review	Review expense reports for approval	Current	2013-02-01 13:20:53	Gwyneth J. Gaspari (gwyn)	Added increasing priority to expense reports the longer they wait in user tasks.
7	Expense Reports Review	Review expense reports for approval	Retired	2013-02-01 13:19:44	Gwyneth J. Gaspari (gwyn)	Added reminder notifications to user tasks.
6	Expense Reports Review	Review expense reports for approval	Retired	2013-02-01 13:18:23	Gwyneth J. Gaspari (gwyn)	Sets docs to withdraw upon completion in end tasks.
5	Expense Reports Review	Review expense reports for approval	Retired	2013-02-01 13:17:40	Gwyneth J. Gaspari (gwyn)	Strengthened logic in start condition.
4	Expense Reports Review	Review expense reports for approval	Retired	2013-02-01 13:15:08	Gwyneth J. Gaspari (gwyn)	Fixed permissions.
3	Expense Reports Review	Review expense reports for approval	Retired	2013-02-01 13:10:13	Gwyneth J. Gaspari (gwyn)	Added automated updating of status.
1	Expense Reports Review	Review expense reports for approval	Retired	2013-01-29 16:18:26	Gwyneth J. Gaspari (gwyn)	First version of new Expense Reports Review workflow.

Open Version

To open a version:

- In **Version History**, select the desired version and click **Open Version**. The workflow version is opened.

Check Out Version for Republication

To open and check out a version:

- In **Version History**, select the desired version and click **Check Out for Republication**. The workflow version is opened and checked out.

Edit Version Comment

To edit a version comment:

1. In **Version History**, select the desired version and click **Edit Comment**. The **Comment** field for the selected version becomes editable.
2. Modify the version comment as needed. To enter multiple lines use **SHIFT+ENTER**.
3. Hit the **ENTER** key. The version comment is edited.

   Note: You must have the **Modify/Delete from Version History** task permission to modify a version comment. See **Feith Control Panel User Guide** for more information.

Delete Version

To delete a version:

1. In **Version History**, select the desired version and click **Delete Version**. A prompt opens confirming the delete.
2. Click **Yes** to proceed with the delete. The version is deleted from the FDD system.

   Notes:

   - You cannot delete the **Current** version of the workflow. See Workflow and Version Status for more information on version **Status**.
   - You must have the **Modify/Delete from Version History** task permission to delete from version history (with one exception, see next note). See **Feith Control Panel User Guide** for more information.
   - A user can always delete their own **Non-Published** and **Information** versions **Checked In By** them, even without the **Modify/Delete from Version History** task permission. See Workflow and Version Status for more information on version **Status**.

Override Check Out

Override another user's check out, breaking their lock on the workflow.

Note: Only a super administrator can override a check out. See **Feith Control Panel User Guide** for more information on super administrators.

It is strongly recommended that you contact the user who already checked out the workflow.

You can find out who checked out the workflow by clicking **Open Workflow** in the standard toolbar and viewing the **Checked Out By** column for that workflow.

To override a check out on a workflow:

1. Click **Open Workflow** in the standard toolbar. The **Open Workflow** dialog opens.
2. Select the workflow for which you want to override the check out. In the **Checked Out By** column you can see who currently has the workflow checked out.
3. Click **Override Check Out** . A prompt to confirm the override opens.
4. Click **Yes** to proceed with the override. The check out is overridden, the map the other user had checked out is saved to the **Version History** as a **Non-Published** version (see Version History for more information), and a message confirming the successful override opens.
5. Click **OK** to proceed. You may now check out the workflow. See Modify Workflow for more information.

Delete Workflow

Delete a Workflow publication to take the workflow out of production. Processing will cease and all work items will be removed from the workflow. The workflow design and version history are saved, and the deleted workflow can be re-published if desired.

Note: In order to delete a workflow you must have the **Workflow Administration** task permission. See Workflow Permissions for more information.

If you want to completely purge a workflow from the FDD system - design, version history, and all - then **Purge the Workflow**. See Purge Workflow for more information.

Delete a Workflow

To delete a workflow publication:

1. Click **Open Workflow** in the standard toolbar. The **Open Workflow** dialog opens.

   View all workflows you can access in the **My Workflows** tab or view workflows you have checked out in the **My Checked Out Workflows** tab (see Modify Workflow for more information on **Checked Out** workflows).

2. Select the desired workflow and click **Delete Workflow Publication** . A prompt to confirm the delete opens.
3. Click **Yes** to proceed with the delete. The workflow publication is deleted and no longer in production, and all work items are removed from the workflow. The workflow design and version history are saved, and the deleted workflow can be re-published if desired.

Re-Publish a Workflow

To re-publish a workflow:

1. **Open the Workflow**. See Open Workflow for more information.
2. **Check Out the Workflow**. The workflow is checked out.
3. Make any changes if needed. See Modify Workflow for more information.
4. **Publish the Workflow**. See Publish Workflow for more information. The workflow is re-published and in production, and work items go into it and processing begins.

Purge Workflow

Purge a Workflow to completely purge a workflow and its version history from the FDD system.

Note: In order to purge a workflow you must have the **Modify/Delete from Version History** and **Workflow Administration** task permissions. See Workflow Permissions for more information.

If you only want to take a workflow out of production and keep its design and version history you can **Delete the Workflow** publication instead. See Delete Workflow for more information.

To purge a workflow completely from the FDD system:

1. Click **Open Workflow** in the standard toolbar. The **Open Workflow** dialog opens.

   View all workflows you can access in the **My Workflows** tab or view workflows you have checked out in the **My Checked Out Workflows** tab (see Modify Workflow for more information on **Checked Out** workflows).

2. Select the desired workflow and click **Purge Workflow from Archive** . A prompt to confirm the purge opens.
3. Click **Yes** to continue with the purge. The workflow and its version history are completely purged from the FDD system.

Save and Restore Backup Files

Save a backup of a workflow map in a .fwf file on your local computer and restore the workflow in the database from that backup file. For example, you may want to save a backup of a workflow where you have made changes upon losing connectivity to the FDD database before exiting Workflow iQ Manager, and restore the workflow from the backup file once database connectivity is restored (see Disconnected for more information).

To save a backup file:

1. **Open a Workflow**. See Open Workflow for more information.
2. Select **Tools>Advanced Options>Save Backup File**. The **Save Workflow Backup** dialog opens.
3. Browse to the desired location and click **Save**. The .fwf file containing a backup of the workflow map is saved.

To restore a backup file:

1. Select **Tools>Advanced Options>Restore Backup File**. The **Restore Backup File** dialog opens.
2. Browse to and select the desired backup .fwf file and click **Open**. The workflow map in the backup .fwf file is opened.
3. **Check Out** and **Save**, **Check In**, or **Publish** the workflow as needed. See Modify Workflow, Save Draft, Check In Version, and Publish Workflow for more information.

   Note: If you are restoring from a backup file because you lost connectivity to the FDD database, when you check out the workflow map from the backup .fwf file you may be prompted that there is a newer draft of the workflow. If so, that draft from the database may be missing the changes you actually saved in the backup .fwf file and therefore you would *not* want to check out that draft from the database. You may want to check out the draft once to confirm what changes it may or may not have.

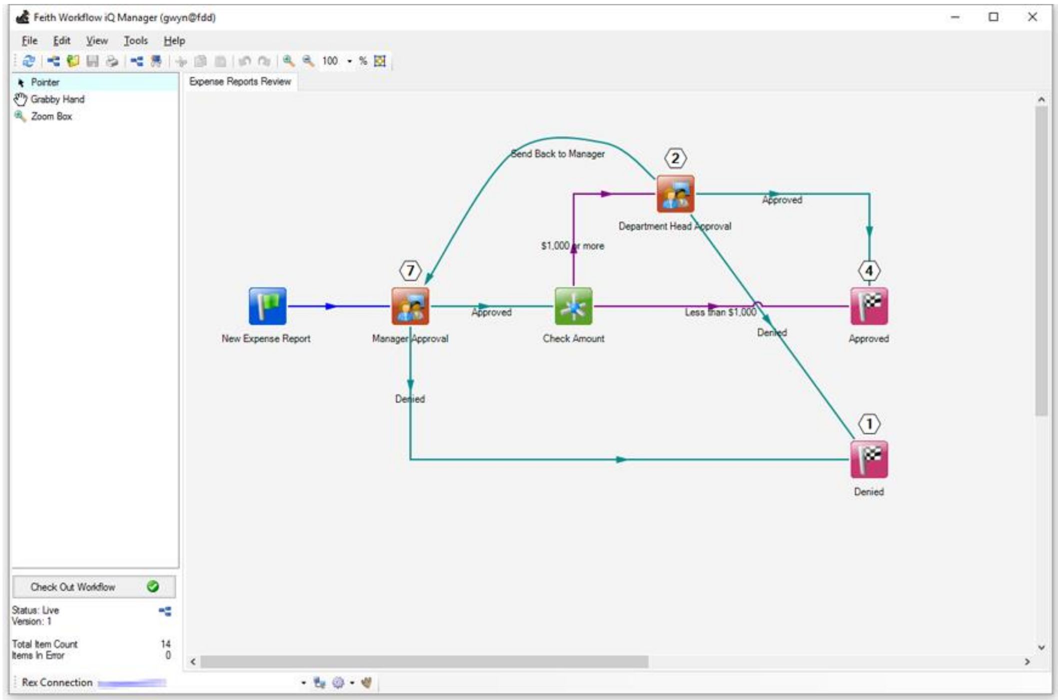
Monitor Workflows

Monitoring Overview

Once a workflow is in production and work items go into it and processing begins, you can monitor the workflow in Workflow iQ Manager.

To monitor one or more workflows:

- **Open** one or more workflows (see Open Workflow for more information). The workflow(s) opens.



Monitor workflows using the following options:

- View and act on work items in a task using **Work Info**, such as clearing errors, removing holds, ad hoc routing, and etc. See View Work Info for more information.
- Locate work items in error or on hold across all workflows to which you have access using the **Status Locator**. See Status Locator for more information.
- Find and **Clear Errors** on work items where Rex encountered an error in the workflow process. See Errors for more information.
- **Remove a User's Hold** on a work item to make it available to other workers again. See Remove Hold for more information.
- Monitor Rex's activity or prompt Rex to process work items immediately using the **Rex Toolbar** and **Rex Monitor**. See Monitor Rex for more information.
- Check the **Wait-For Status** of work items sitting in a wait-for task. See Wait-For Status for more information.
- **Ad Hoc Route** a work item from one task to another on an as-needed basis. See Ad Hoc Route for more information.
- **Withdraw** a work item **From a Task** or **From an Entire Workflow**. See Withdraw for more information.

- View a **Dashboard iQ** dashboard, which may be configured to show workflow processing or other relevant information, inside Workflow iQ Manager next to your workflows. See The Dashboard iQ Pane for more information.
- View the **Workflow History** to see the audit trail of every step a work item has taken in any workflow. See Workflow History for more information.
- **Locate** a work item in all the workflow tasks where it currently resides. See Locate for more information.
- **Find a Task** in the workflow using **Edit>Find Task**. See Add Tasks for more information.
- Adjust workflow map display options, such as zooming in and out, changing the theme or background color, showing or hiding task and route labels, turning animation on or off, etc. See The Workflow Map for more information.
- When monitoring multiple workflows, reorder the workflow tabs as desired or optionally **Auto-Cycle** the workflows. See The Workflow Tabs for more information.
- Double-click a task or route to view its configuration, or right-click a route and select **Route Information** to view a route's origin task and destination task, which may not be immediately apparent visually in the workflow map.
- Set up worker vacations and their substitutes using the **Vacation Planner**. See Vacation Planner for more information.
- If you are in the workflow's **Administration Group** (see Workflow Properties for more information), you have access to the workflow's admin file cabinet which you can use to search for and view documents, search by task, view status information, ad hoc route documents, and more. The admin file cabinet is accessed through a client application such as FDD Client or WebFDD. See **FDD User Guide** and **WebFDD User Guide** for more information.

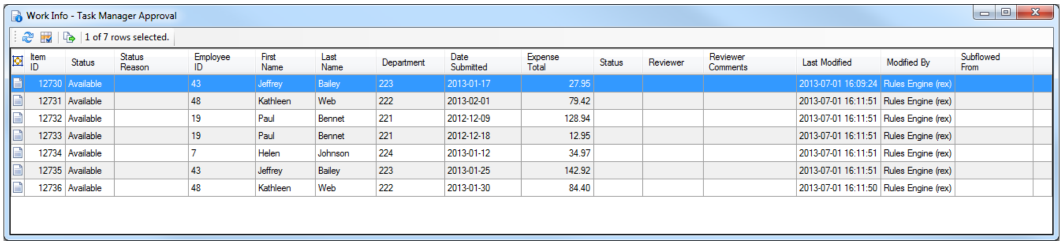
View Work Info

View and act on work items in a task using **Work Info**, such as clearing errors, removing holds, ad hoc routing, and etc.

To open Work Info:

- Double-click the work item count above the task. The **Work Info** dialog opens and displays several columns containing information on the work items, offers several actions to perform on the work items, and has a few display options.

  Alternatively, right-click the task and select **Work Info**.



Item ID	Status	Status Reason	Employee ID	First Name	Last Name	Department	Date Submitted	Expense Total	Status	Reviewer	Reviewer Comments	Last Modified	Modified By	Subflowed From
12730	Available		43	Jeffrey	Bailey	223	2013-01-17	27.95				2013-07-01 16:09:24	Rules Engine (rex)	
12731	Available		48	Kathleen	Web	222	2013-02-01	79.42				2013-07-01 16:11:51	Rules Engine (rex)	
12732	Available		19	Paul	Bennet	221	2012-12-09	128.94				2013-07-01 16:11:51	Rules Engine (rex)	
12733	Available		19	Paul	Bennet	221	2012-12-18	12.95				2013-07-01 16:11:51	Rules Engine (rex)	
12734	Available		7	Helen	Johnson	224	2013-01-12	34.97				2013-07-01 16:11:51	Rules Engine (rex)	
12735	Available		43	Jeffrey	Bailey	223	2013-01-25	142.92				2013-07-01 16:11:51	Rules Engine (rex)	
12736	Available		48	Kathleen	Web	222	2013-01-30	84.40				2013-07-01 16:11:50	Rules Engine (rex)	

Tip: If you only want to view items in error, view **Error Info** instead.

See the following sections for information and instructions:

- Work Info Columns
- Work Info Actions
- Work Info Display Options

Work Info Columns

There are several columns containing information the work items in Work Info:

- The work item's type, indicated by an icon, as a document , folder , or dynamic folder .
- **Item ID:** The internal ID of the work item.
- **Status:** The current workflow status of the work item. Possible statuses are:
  - **Available:** The work item is available to be worked.
  - **Locked:** The work item is locked by a user in the client (FDD or WebFDD).
  - **On Hold:** The item has been put on hold by a user in the client (FDD or WebFDD) and only they can access that work item. See Remove Hold for more information.
  - **Done:** The work item has been processed in the task and will move on to the next step in the workflow.
  - **Ad Hoc Route:** The work item will be ad hoc routed to another task. See Ad Hoc Route for more information.
  - **Complete:** The work item has arrived in an end task and has completed the workflow.
  - **Error:** Rex encountered an error while processing the work item. See Errors for more information.
  - **Withdrawn:** The work item will be withdrawn from the task or workflow. See Withdraw for more information.
- **Status Reason:** The reason the work item has its current **Status** (e.g. a work item is in Error because no applicable route was found).
- The work item's index values from the workflow's base file cabinet.

- **Last Modified:** The date and time the work item was last acted upon, when the current **Status** took effect.
- **Modified By:** The user who last acted on the work item, causing the current **Status**.
- **Subflowed From:** The "parent" workflow and task that the document was subflowed from. See Subflow Task for more information.

Tip: If a value does not display in its entirety, click the **Best Fit Displayed Data** button in the upper left of the grid. Alternatively, you can just mouse over the value and it will display in a tooltip in its entirety.

Work Info Actions

There are several actions available to perform on work items in Work Info:

- **Withdraw All**: Withdraw all work items from the task. See Withdraw for more information.

  Tip: The Withdraw All option is helpful if you need to clean out a large number of work items that have piled up in an end task. You may want to consider having completed work items in the end task withdrawn automatically (see End Task for more information).

- **Ad Hoc Route:** Route one or more work items from one task to another on an as-needed basis. See Ad Hoc Route for more information.
- **Clear Error:** Clear an error on one or more work items, once the cause is addressed, so they can move on in the workflow. See Errors for more information.
- **Remove Hold:** Remove a user's hold on one or more work items to make them available again. See Remove Hold for more information.
- **Withdraw:** Withdraw one or more work items **From a Task** or **From an Entire Workflow**. See Withdraw for more information.
- **Leap:** Perform a leap on the work item in FDD.

  Notes:

  - FDD must be installed on your computer.
  - Only SQL and URL leaps are supported.
  - See **FDD User Guide** for more information on leaps and their types.

- **Locate:** Locate one or more work items in all the workflow tasks where they currently reside. See Locate for more information.
- **View Item:** View the work item in FDD or WebFDD **In the Administrator File Cabinet** or **In the Base File Cabinet**.

  Notes:

  - FDD must be installed on your computer and/or there must be a WebFDD server entry in your FDD system. The options provided here depend on which clients are available to you.
  - You must have permission to the selected file cabinet.

- **Work:** Open the work item in FDD or WebFDD to work it in the selected task.

  Notes:

  - FDD must be installed on your computer and/or there must be a WebFDD server entry in your FDD system. The options provided here depend on which clients are available to you.
  - This action is only supported for user tasks.
  - You must have permission to the user task.

- **Workflow History:** View the Workflow History of where a work item has been across all workflows. See Workflow History for more information.
- **Copy Data:** Copy the Work Info data for one or more work items to the clipboard (e.g. to paste into Microsoft Excel).
- **Copy Link:** Copies the WebFDD link to the document to the clipboard, so you can paste it into an email or elsewhere. Select multiple documents to copy multiple links.
- **Mail Data:** Email a document's metadata to another person, including a WebFDD link to the document, the internal document ID, and the file cabinet index values.

Work Info Display Options

There are a few display options in Work Info:

- **Refresh** the work item list.
- Choose the **Maximum Number of Rows to Retrieve**.
- When Work Info is retrieving a large number of work item rows, you can **Cancel** and only the rows retrieved up until that point are displayed.
- Click a column header (e.g. **Status**) to sort the rows by that column in ascending order. Click the column header again to sort the rows by that column in descending order.

Status Locator

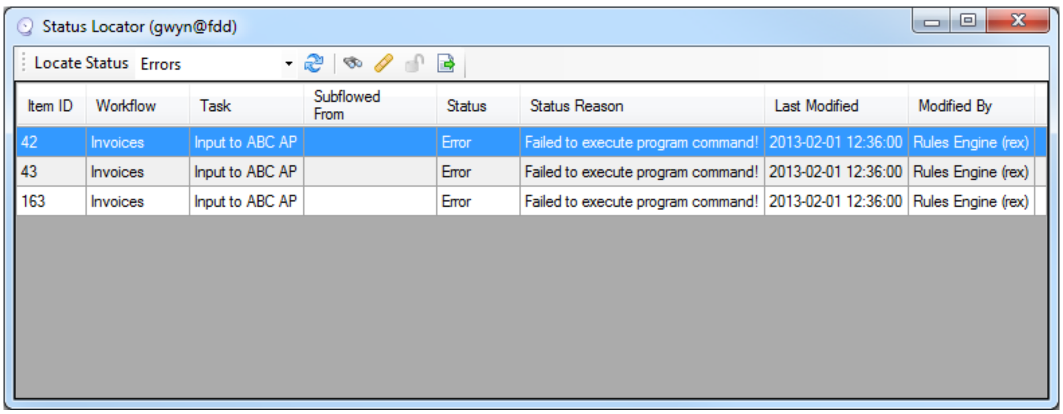
Use the **Status Locator** to locate work items in error or on hold across all workflows to which you have access. A work item in **Error** had a problem where Rex encountered an error while processing the work item. A work item **On Hold** has been put on hold by a user in the client (FDD or WebFDD) and only they can access that work item.

To open the Status Locator:

- Select **Tools>Status Locator**. The **Status Locator** opens and displays several columns containing information on the work items, offers a few actions to perform on the work items, and has a few display options.

  You may select to **Locate Status Errors** or **Holds**.

  Tip: Double-click a row to open the workflow and go to the task.



See the following sections for information and instructions:

- Status Locator Columns
- Status Locator Actions
- Status Locator Display Options

Status Locator Columns

There are several columns containing information the work items in the Status Locator:

- **Item ID:** The internal ID of the work item.
- **Workflow:** The workflow containing the work item.
- **Task:** The task containing the work item.
- **Subflowed From:** If the work item is in a subflow, the "parent" subflow task the work item came from in the "parent" workflow. See Subflow Task for more information.
- **Status:** The current workflow status of the work item. Depending on your **Locate Status** selection, you are viewing work items in **Error** or **On Hold**:
  - **Error:** Rex encountered an error while processing the work item.
  - **On Hold:** A work item has been put on hold by a user in the client (FDD or WebFDD) and only they can access that work item.
- **Status Reason:** The reason the work item has its current **Status** (e.g. a work item is in Error because no applicable route was found).
- **Last Modified:** The date and time the work item was last modified.

- **Modified By:** The user who last modified the work item.
- **Hold Reason:** The reason the end user gave to put the work item on hold.
- **Hold Until:** The date and time the end user selected to automatically remove the hold on the work item.

Status Locator Actions

There are a few actions available to perform on work items in the Status Locator:

- **Locate:** Locate one or more work items in all the workflow tasks where they currently reside. See Locate for more information.
- **Clear Error:** Clear an error on one or more work items, once the cause is addressed, so they can move on in the workflow. See Errors for more information.
- **Remove Hold:** Remove a user's hold on one or more work items to make them available again. See Remove Hold for more information.
- **Withdraw From Task :** Withdraw one or more work items from a task. See Withdraw for more information.

Status Locator Display Options

There are a few display options in the Status Locator:

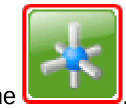
- Choose whether to **Locate Status Errors** or **Holds**.
- **Refresh** the work item list.
- Click a column header (e.g. **Workflow**) to sort the rows by that column in ascending order. Click the column header again to sort the rows by that column in descending order.

Errors

A work item goes into **Error** when Rex encountered a problem processing the item. For example, an error may occur when no applicable conditional routes are found for a work item that needs to be routed, or a finishing touch failed to execute, or a program on a hub task returned an error to Rex.

Tip: If you are unsure why an error has occurred, view the Rex log to get more information on when and why Rex encountered the error. See Monitor Rex for more information.

Errors are handled in the following ways:

- A task containing a work item with a **Status** of **Error** has a red outline . Address the cause of the error then **Clear the Error** so the work item can move on in the workflow. See Clear Error for more information.
- If the task has an outgoing **Error Route**, a work item that goes into **Error** takes the error route and arrives at the next task with a **Status** of **Available** and is ready to go through the workflow process designed to make sure the error gets addressed. See Error Route for more information.

Find Error

To find a work item in error:

- Use the **Status Locator** to find **Errors**.
- In the administrator toolbar on the left, view the **Items in Error** count in the current workflow information.
- Notice a task with a red outline, which contains a work item with a **Status** of **Error**.
- View a task that receives work items from an **Error Route**.
- If you are in the workflow's administration group, you are notified by email that the error occurred. Details from the Rex log are in the email, including when the error occurred, the reason for the error, and the work item that went into error.

Error Info

To only view documents in error:

- Right-click a task and select **Error Info**. The **Error Info** dialog opens. Error Info is like Work Info except it only lists items in error.

Clear Error

A task containing a work item with a **Status** of **Error** has a red outline. Address the cause of the error then **Clear the Error** so the work item can move on in the workflow.

To clear an error:

1. Locate the work item in **Work Info** in the specific task or in the **Status Locator**. See View Work Info and Status Locator for more information.
2. Right-click the work item and select **Clear Error**. The error is cleared and Rex attempts to process the work item again.

   Note: Rex is automatically prompted to re-process the work item, though note that if Rex's processing is turned off the automatic prompt will have no effect.

Remove Hold

Remove a User's Hold on a work item to make it available to other workers again.

To remove a hold:

1. Locate the work item in **Work Info** in the specific task or in the **Status Locator**. See View Work Info and Status Locator for more information.
2. Right-click the work item and select **Remove Hold**. The hold is removed and the work item is available to all workers in the task again.

Monitor Rex

Monitor Rex's activity or prompt Rex to process work items immediately using the **Rex Toolbar** and **Rex Monitor** . Feith Rules Engine (Rex) is the application that actually moves work items through workflows according to your business rules, routing work items, setting deadlines, queuing emails, etc.

See the following sections for instructions and information:

- Rex Connection and Status
- Rex Actions
- The Rex Monitor
- The Rex Log

See The Toolbars for general information on the Rex Toolbar.

Rex Connection and Status

Workflow iQ Manager connects to Rex to provide up-to-date information on the work items being processed, allow you to monitor Rex's activity, or prompt Rex to process work items immediately.

To connect to Rex:

- In the Rex toolbar select your **Rex Connection**.

Tip: Mouse over the text **Rex Connection** to see how much time there is until the next time Rex is scheduled to process workflows.

When Workflow iQ Manager is connected to Rex, it shows as connected in the Rex toolbar. If Workflow iQ Manger is not connected to Rex, it shows as disconnected in the Rex toolbar. You may manually disconnect or connect Rex by clicking the status indicator / **.**

If the **Rex Connection** text in the Rex toolbar is blue then Rex is working the workflow. If the **Rex Connection** is **red** then Rex is not working the workflow.

Rex may not be working the workflow because:

- The workflow was just published and Rex does not know about the workflow yet in order to process it. Rex will find the workflow and begin processing on its own, or you can force Rex to take over the workflow by clicking the down arrow on the Rex action button in the Rex toolbar and selecting **Take Over Workflow Processing**.
- The selected Rex is intentionally not assigned to work the workflow. This may occur if you have more than one Rex running and different Rexes work different workflows for purposes of load balancing.

If at any time you need to refresh your connection to Rex:

- Select **Tools>Rules Engine>Refresh Connection**.

Rex Actions

Rex processes work items as needed without requiring user interaction, but you may prompt Rex when needed such as for testing or troubleshooting. Use the Rex action button in the Rex toolbar to process work items immediately or perform other actions by clicking the button's down arrow and selecting the desired action.

Available actions include:

- **Process Workflows:** Prompt Rex to check for work items that need to be processed.

  Note: This action does not check polled conditions, wait-fors, rendezvous, or deadlines.

- **Check Polled Conditions:** Prompt Rex to check whether there are more work items that need to be added to workflows according to the polled conditions configured in start tasks. See Set Start Condition for more information.

- **Check Wait-Fors:** Prompt Rex to check whether work items in wait-for tasks meet the rule(s) specified in order to move on in the workflows. See Wait-For Task for more information.

  Note: If the document meets the conditions upon arrival at the wait-for task, the document will pass through immediately. If the document meets the conditions later on, after it arrived in the task, Rex will move the document the next time the wait-for tasks are checked.

- **Check For Rendezvous:** Prompt Rex to check whether work items in rendezvous tasks have been reunited with all copies of themselves in the workflows. See Rendezvous Task for more information.

- **Check Deadlines:** Prompt Rex to check whether there are work items that have passed deadlines in a deadline route or deadline task. See Deadline Route and Deadline Task for more information.

- **Take Over Workflow Processing:** Prompt Rex to take over all workflows it is allowed to work.

- **Retrieve Rex Log:** View the Rex log to see Rex's activity.

- **Retrieve Rex Status:** View the Rex status report to see Rex's connection information, current status, and events that have occurred since Rex started.

Tips:

- If you do not want the Rex Monitor to launch every time you prompt Rex, turn off **Show Monitor on Requests** under **Tools>Rules Engine**.

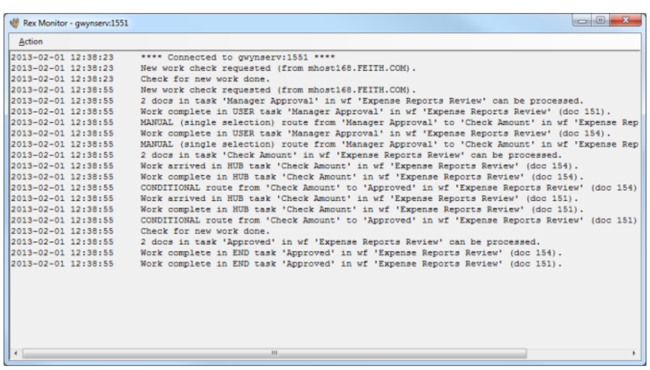
- Rex will perform the above checks on its own at configured intervals. You may change the intervals for Rex's checks in order to tune Rex according to the needs of your system. See **Rex Manual** for more information.

The Rex Monitor

The **Rex Monitor** reports Rex's activity. It provides all the same actions available in the Rex toolbar (see Rex Actions for more information) plus a few more actions.

To open the Rex Monitor:

- Click **Rex Monitor** in the Rex toolbar. The Rex Monitor opens.



Under the **Action** menu, in addition to the actions available in the Rex toolbar (see Rex Actions for more information), the Rex Monitor offers the following actions:

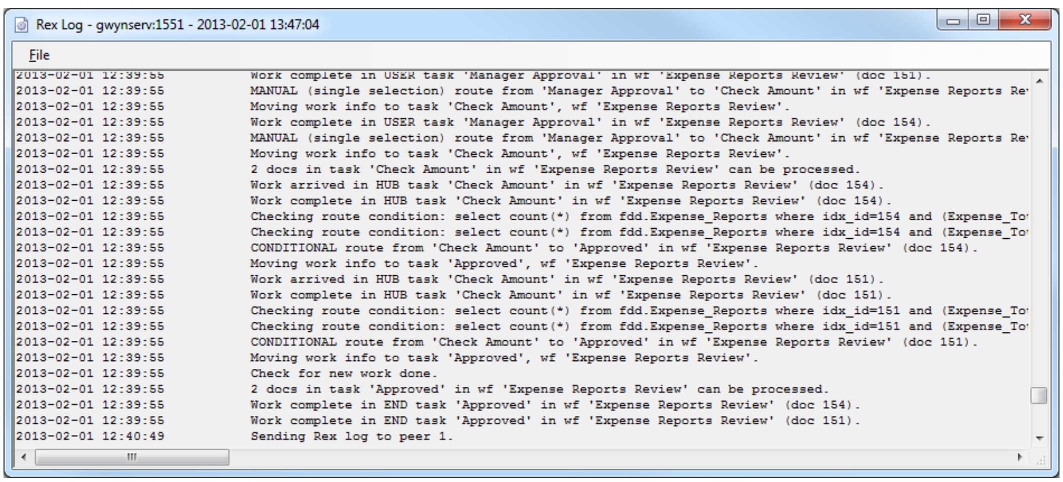
- **Update Resources:** Prompt Rex to check whether there are new or expired resource allocations (i.e. substitutes for vacationing users).
- **Turn Processing On:** Turn Rex on. Rex is active, checking for work items that need to be processed and processing those work items.
- **Turn Processing Off:** Turn Rex off. Rex is inactive and does not do anything unless manually prompted.
- **Purge Cache:** Clears Rex's cache of workflows, tasks, task options, and routes, in order to ensure from that point forward that Rex is retrieving the most up-to-date workflow and task information from the database.

The Rex Log

View the Rex log to see Rex's activity.

To open the Rex log:

- In the Rex toolbar click the down arrow on the Rex action button  and select **Retrieve Rex Log**. The **Rex Log** opens.



Options in the Rex log include:

- Refresh the log using **File>Refresh**.
- Look for a word or phrase in the log text using **File>Find** and **Find Next** (**F3**).
- Copy Rex log text to the clipboard by selecting the desired text then right-clicking and selecting **Copy**. To select all text right-click and choose **Select All**.
- Save the entire Rex log to a file on your machine using **File>Save As**.

Wait-For Status

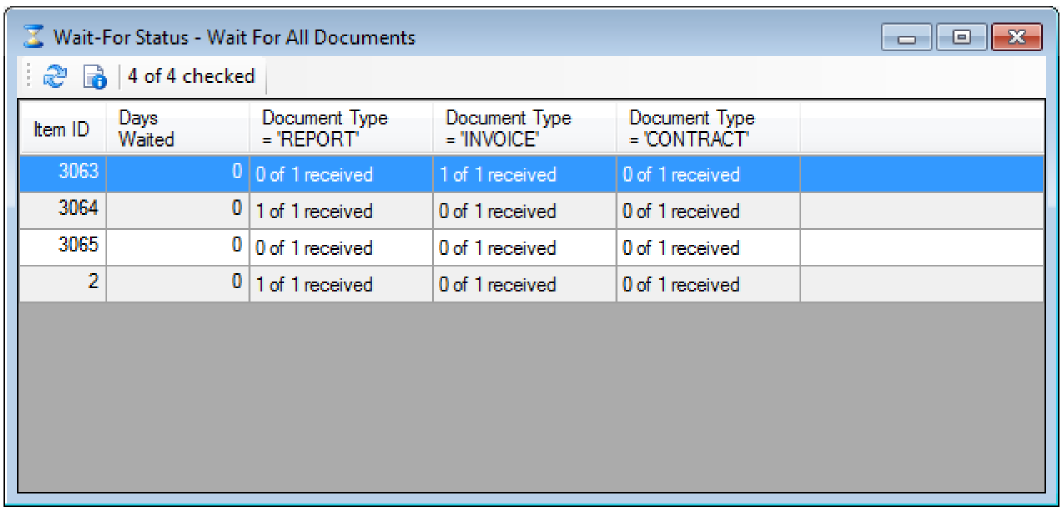
The status of each work item in a wait-for task in regard to meeting the specified rule(s). See Wait-For Task for more information on wait-for rules.

To view Wait-for Status:

- Right-click the desired wait-for task and select **Wait-For Status**. The **Wait-For Status** dialog opens and displays each work item by **ID**, the number of **Days Waited**, the specified wait-for rules, and whether each rule has been met for the waiting work items. A work item that has satisfied all the rules will move on to the next step in the workflow.

  When you open **Wait-For Status**, the check on each rule for each document will begin to run and fill in the status. At any time you may click **Cancel** to stop the check at that point.

  Mouse over the header of a rule to view the full rule. **Refresh** the list as needed.



To view the Work Info of a waiting work item from Wait-For Status:

1. In the **Wait-For Status** dialog, select one or more waiting work items. Select multiple work items using **CTRL+click** or **SHIFT+click**.
2. Right-click and select **Work Info**. The **Work Info** dialog opens and displays the selected waiting work items. You may check the work item information in Work Info, such as index values used in a wait-for rule.

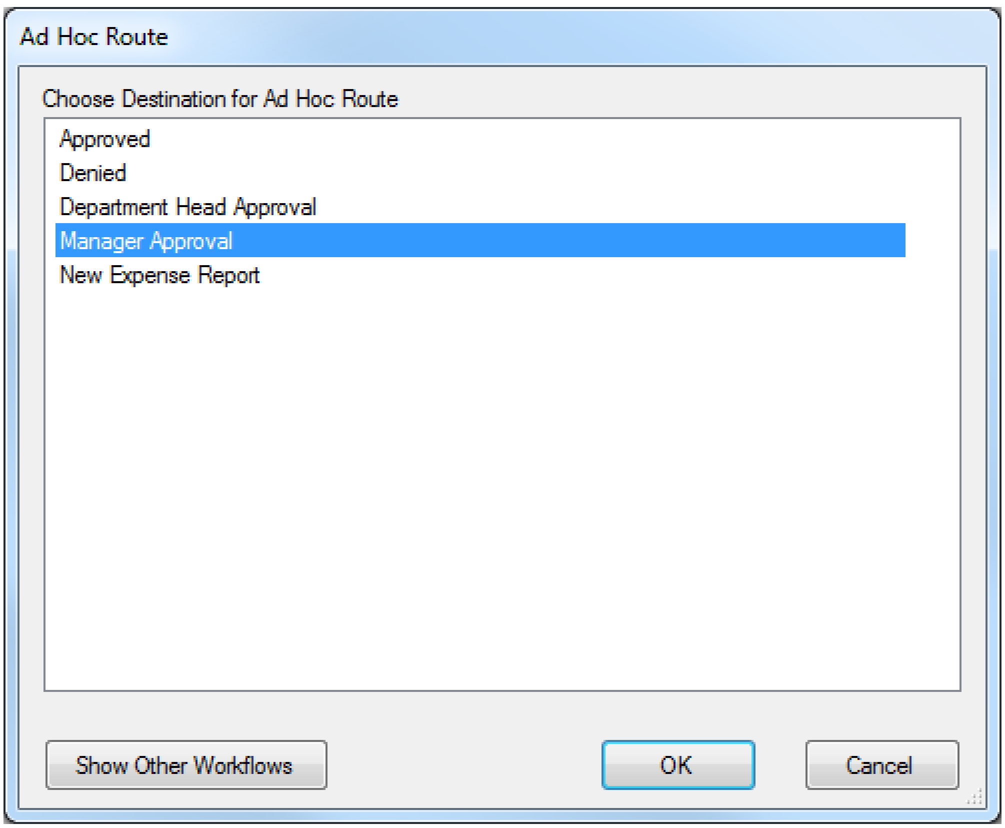
Ad Hoc Route

Ad Hoc Route a work item from one task to another on an as-needed basis.

To ad hoc route a work item:

1. Double-click the work item count above a task. The **Work Info** dialog opens.
2. Select one or more work items you want to ad hoc route. Select multiple work items using **CTRL+click** or **SHIFT+click**.
3. Right-click and select **Ad Hoc Route**. The **Ad Hoc Route** dialog opens and lists all tasks in the workflow.
4. Choose one or more tasks to which you want to ad hoc route the work item. Select multiple tasks using **CTRL+click** or **SHIFT+click**.

   Optionally **Show Other Workflows** to also select from all tasks in all workflows built on the same file cabinet.



5. Click **OK**. The work item(s) is routed to the select task(s) by Rex.

   Note: Rex is automatically prompted to ad hoc route the work item, though note that if Rex's processing is turned off the automatic prompt will have no effect.

Withdraw

Withdraw a work item from a task or from an entire workflow. Withdrawing a work item from a workflow does *not* delete the document or folder from the FDD system; the work item is merely removed from the workflow.

Notes:

- In order to withdraw a work item from a workflow you must have the **Withdraw from Workflow** task permission. See **Feith Control Panel User Guide** for more information on granting task permissions.
- Work items can only be withdrawn if they have a status of **Available**, **Complete**, **Error**, or **Subflow**.
- Withdrawing multiple work items at once from the entire workflow is not supported.

To withdraw a work item:

1. Double-click the work item count above a task. The **Work Info** dialog opens.
2. Select one or more work items you want to withdraw. Select multiple work items using **CTRL+click** or **SHIFT+click**.
3. Right-click and select **Withdraw**. You are presented with the following options:
    - **From Task:** Withdraw the work item from the current task.
    - **From Entire Workflow:** Withdraw the work item from all tasks in the current workflow.
4. Choose to withdraw **From Task** or **From Entire Workflow**. A prompt opens confirming the withdrawal.
5. Click **Yes** to proceed with the withdrawal. The work item is withdrawn by Rex.

    Note: Rex is automatically prompted to withdraw the work item, though note that if Rex's processing is turned off the automatic prompt will have no effect.

To withdraw all work items from a task:

1. Double-click the work item count above a task. The **Work Info** dialog opens.
2. Click the **Withdraw All** button in the toolbar. A confirmation prompt opens to verify you want to withdraw all work items from the task.
3. Click **Yes** to proceed. All work items are withdrawn from the task.

Tip: The Withdraw All option is helpful if you need to clean out a large number of work items that have piled up in an end task. You may want to consider having completed work items in the end task withdrawn automatically (see End Task for more information).

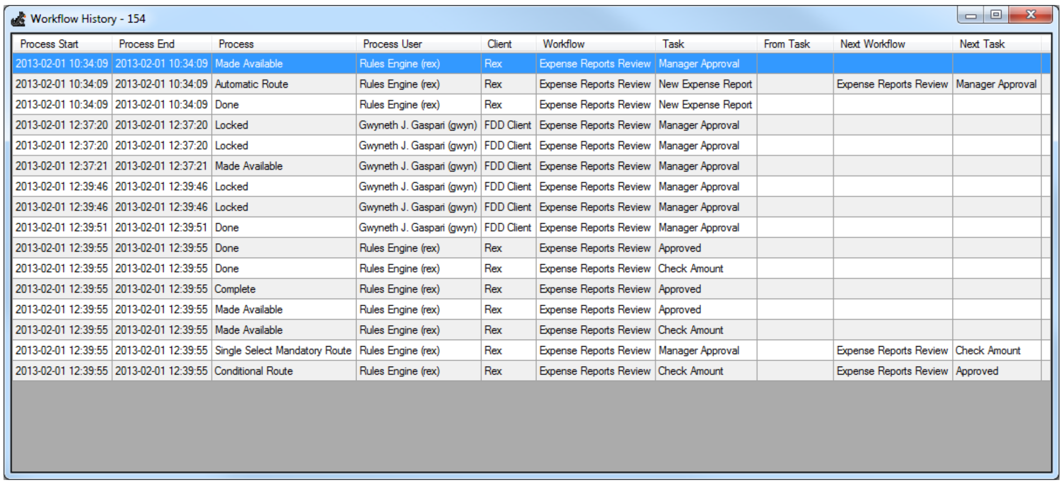
Workflow History

View the **Workflow History** to see the audit trail of every step a work item has taken in any workflow.

To view the Workflow History of a work item:

1. Double-click the work item count above a task. The **Work Info** dialog opens.
2. Right-click the work item and select **Workflow History**. The **Workflow History** dialog opens and displays the audit trail of every step the work item has taken in any workflow.

   Click a column header (e.g. **Process User**) to sort the rows by that column in ascending order. Click the column header again to sort the rows by that column in descending order.


Workflow History - 154

Process Start	Process End	Process	Process User	Client	Workflow	Task	From Task	Next Workflow	Next Task
2013-02-01 10:34:09	2013-02-01 10:34:09	Made Available	Rules Engine (rex)	Rex	Expense Reports Review	Manager Approval			
2013-02-01 10:34:09	2013-02-01 10:34:09	Automatic Route	Rules Engine (rex)	Rex	Expense Reports Review	New Expense Report		Expense Reports Review	Manager Approval
2013-02-01 10:34:09	2013-02-01 10:34:09	Done	Rules Engine (rex)	Rex	Expense Reports Review	New Expense Report			
2013-02-01 12:37:20	2013-02-01 12:37:20	Locked	Gwyneth J. Gaspari (gwyn)	FDD Client	Expense Reports Review	Manager Approval			
2013-02-01 12:37:20	2013-02-01 12:37:20	Locked	Gwyneth J. Gaspari (gwyn)	FDD Client	Expense Reports Review	Manager Approval			
2013-02-01 12:37:21	2013-02-01 12:37:21	Made Available	Gwyneth J. Gaspari (gwyn)	FDD Client	Expense Reports Review	Manager Approval			
2013-02-01 12:39:46	2013-02-01 12:39:46	Locked	Gwyneth J. Gaspari (gwyn)	FDD Client	Expense Reports Review	Manager Approval			
2013-02-01 12:39:46	2013-02-01 12:39:46	Locked	Gwyneth J. Gaspari (gwyn)	FDD Client	Expense Reports Review	Manager Approval			
2013-02-01 12:39:51	2013-02-01 12:39:51	Done	Gwyneth J. Gaspari (gwyn)	FDD Client	Expense Reports Review	Manager Approval			
2013-02-01 12:39:55	2013-02-01 12:39:55	Done	Rules Engine (rex)	Rex	Expense Reports Review	Approved			
2013-02-01 12:39:55	2013-02-01 12:39:55	Done	Rules Engine (rex)	Rex	Expense Reports Review	Check Amount			
2013-02-01 12:39:55	2013-02-01 12:39:55	Complete	Rules Engine (rex)	Rex	Expense Reports Review	Approved			
2013-02-01 12:39:55	2013-02-01 12:39:55	Made Available	Rules Engine (rex)	Rex	Expense Reports Review	Approved			
2013-02-01 12:39:55	2013-02-01 12:39:55	Made Available	Rules Engine (rex)	Rex	Expense Reports Review	Check Amount			
2013-02-01 12:39:55	2013-02-01 12:39:55	Single Select Mandatory Route	Rules Engine (rex)	Rex	Expense Reports Review	Manager Approval		Expense Reports Review	Check Amount
2013-02-01 12:39:55	2013-02-01 12:39:55	Conditional Route	Rules Engine (rex)	Rex	Expense Reports Review	Check Amount		Expense Reports Review	Approved

There are several columns containing information on the work item in its Workflow History:

- **Process Start:** The date and time the process began.
- **Process End:** The date and time the process ended (if applicable).
- **Process:** The type of process that occurred.
- **Process User:** The user who caused the process.
- **Client:** The application in which the process occurred.
- **Workflow:** The workflow in which the process occurred.
- **Task:** The task in which the process occurred (if applicable).
- **From Task:** The task from which the work item came (if applicable).
- **Next Workflow:** The workflow to which the work item was sent (if applicable).
- **Next Task:** The task to which the work item was sent (if applicable).

Locate

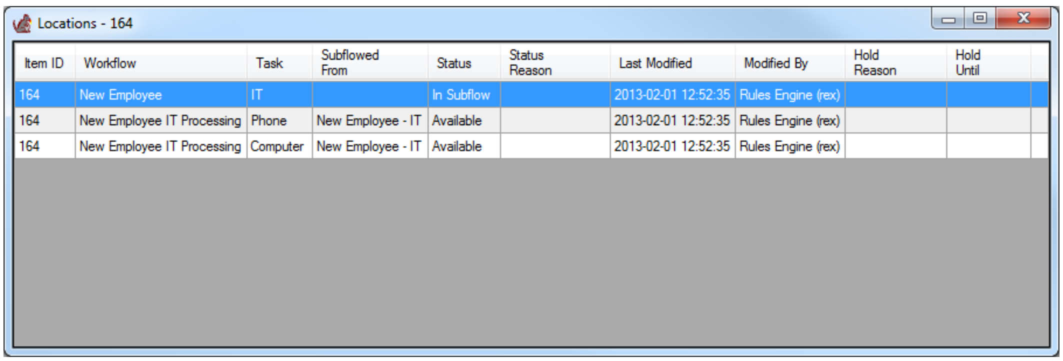
Locate a work item in all the workflow tasks where it currently resides.

To locate a work item:

1. Double-click the work item count above a task. The **Work Info** dialog opens.
2. Right-click the work item and select **Locate**. The **Locations** dialog opens and displays every workflow and task where the work item currently resides.

   Click a column header (e.g. **Workflow**) to sort the rows by that column in ascending order. Click the column header again to sort the rows by that column in descending order.

   Tip: Double-click a row to open the workflow and go to the task.



Item ID	Workflow	Task	Subflowed From	Status	Status Reason	Last Modified	Modified By	Hold Reason	Hold Until
164	New Employee	IT		In Subflow		2013-02-01 12:52:35	Rules Engine (rex)		
164	New Employee IT Processing	Phone	New Employee - IT	Available		2013-02-01 12:52:35	Rules Engine (rex)		
164	New Employee IT Processing	Computer	New Employee - IT	Available		2013-02-01 12:52:35	Rules Engine (rex)		

There are several columns containing information on the work item in its Locations:

- **Item ID:** The internal ID of the work item.
- **Workflow:** The workflow containing the work item.
- **Task:** The task containing the work item.
- **Subflowed From:** If the work item is in a subflow, the "parent" subflow task the work item came from in the "parent" workflow. See Subflow Task for more information.
- **Status:** The current workflow status of the work item.
- **Status Reason:** The reason the work item has its current **Status** (e.g. a work item is in Error because no applicable route was found).
- **Last Modified:** The date and time the work item was last modified.
- **Modified By:** The user who last modified the work item.
- **Hold Reason:** The reason the end user gave to put the work item on hold.
- **Hold Until:** The date and time the end user selected to automatically remove the hold on the work item.

Vacation Planner

Set up worker vacations and their substitutes using the **Vacation Planner** . During the regular worker's vacation, the substitute worker temporarily has permission to tasks where the vacationing user is assigned, including user tasks and start tasks (see Start Task and User Task for more information). The substitute worker gets all resource permissions on the tasks, including Search, View, Insert, Update, and Delete, as well as all the vacationing user's task permissions (see **Feith Control Panel User Guide** for more information on task permissions). When the vacation is over, the substitute worker is removed from the vacationing worker's tasks and no longer has the vacationing user's task permissions.

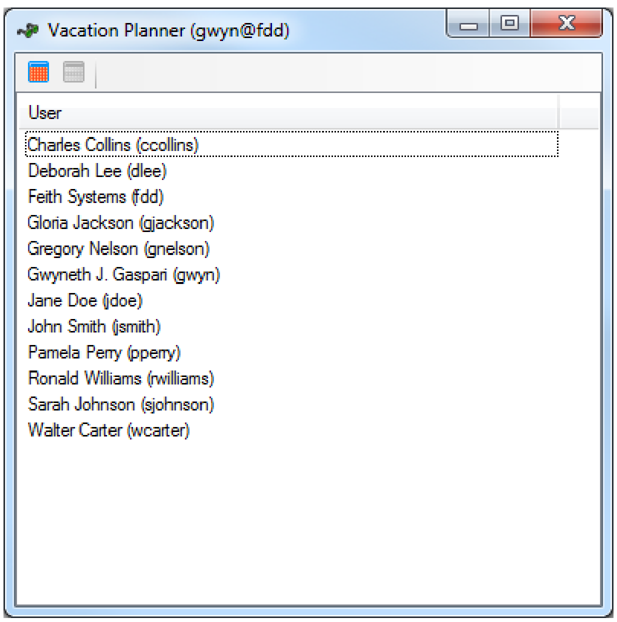
See the following sections for instructions;

- Create Vacation Assignment
- Modify Vacation Assignment
- Delete Vacation Assignment

Create Vacation Assignment

To create a vacation assignment:

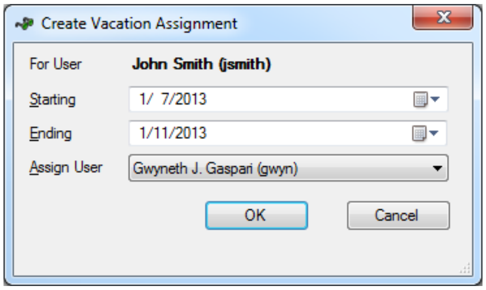
1. Select **Tools>Vacation Planner**. The **Vacation Planner** opens and displays all workflow users.



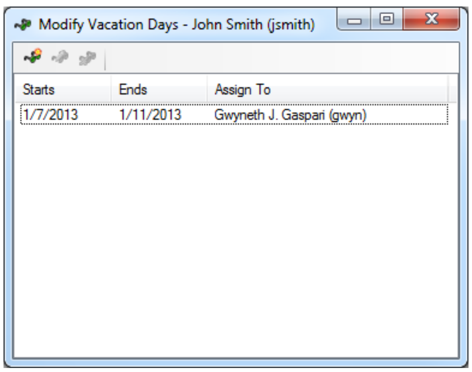
2. Select the user(s) for which you want to create a vacation assignment. Either select one or more specific users and click **Edit Selected** (select multiple users with **CTRL+click** or **SHIFT+click**) or click **Edit All** to select all users. The **Modify Vacation Days** dialog opens.
3. Click **Create Vacation Assignment** . The **Create Vacation Assignment** dialog opens.
4. In the **For User** field, select the user going on vacation.

   Note: If you only selected one user, their name is already selected and cannot be changed.
5. Enter the **Starting** and **Ending** dates of the vacation.

6. In the **Assign User** field, select the substitute user who will work in place of the vacationing user.



7. Click **OK**. The vacation assignment is created and Rex will assign the substitute user when the vacation begins.



Modify Vacation Assignment

To modify a vacation assignment:

1. Select **Tools>Vacation Planner**. The **Vacation Planner** opens and displays all workflow users.
2. Select the user(s) for which you want to modify a vacation assignment. Either select one or more specific users and click **Edit Selected** (select multiple users with **CTRL+click** or **SHIFT+click**) or click **Edit All** to select all users. The **Modify Vacation Days** dialog opens.
3. Select the vacation assignment you want to modify and click **Modify Vacation Assignment** . The **Modify Vacation Assignment** dialog opens.
4. Modify the vacation assignment as needed.
5. Click **OK**. The vacation assignment is modified.

Delete Vacation Assignment

To delete a vacation assignment:

1. Select **Tools>Vacation Planner**. The **Vacation Planner** opens and displays all workflow users.
2. Select the user(s) for which you want to delete a vacation assignment. Either select one or more specific users and click **Edit Selected** (select multiple users with **CTRL+click** or **SHIFT+click**) or click **Edit All** to select all users. The **Modify Vacation Days** dialog opens.
3. Select the vacation assignment you want to delete and click **Delete Vacation Assignment** . The vacation assignment is deleted.

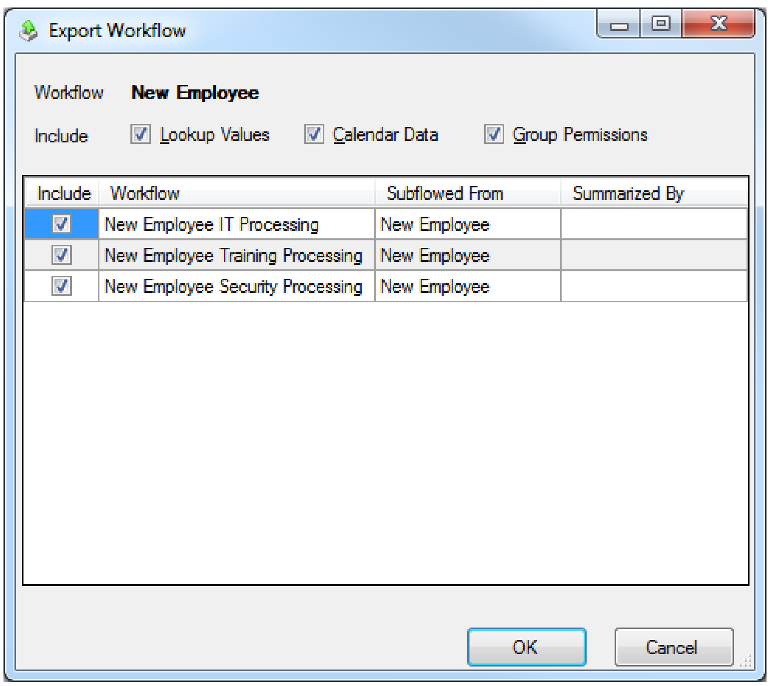
Export and Import Workflows

Export

Export a workflow design to a .fwx file, then use the file to import the workflow design to another FDD database (e.g. from a test system to a production system).

To export a workflow design:

1. **Open a Workflow**. See Open Workflow for more information.
2. Select **File>Export**. The **Export Workflow** dialog opens.
3. Choose from the following export options for features used in the workflow design:
    - **Lookup Values:** Optionally include the values from lookup tables in the export file. When included, a lookup table created during the import process will have the values of the original lookup table; when excluded, the lookup table will be empty.
    - **Calendar Data:** Optionally include the work week (business days) and holidays from calendars in the export file. When included, a calendar created during the import process will have the data of the original calendar; when excluded, the calendar will have no data, in other words a 24/7 calendar with no holidays.
    - **Group Permissions:** Optionally include task permissions (e.g. scan/import, index, search file cabinets, etc) from groups in the export file. When included, a group created during the import process will have the task permissions of the original group; when excluded, the group will have no task permissions.
    - **Subflows and Summarized workflows:** Optionally include subflows and summarized workflows in the export file. When included, you can choose to import the "parent" workflow as well as its subflows and summarized workflows at the same time.



4. Click **OK**. The **Export Workflow** dialog opens, prompting you to save the file.
5. Browse to the desired location and click **Save**. The .fwx export file containing the workflow design is saved to the specified location.

Import

Import a .fwx export file containing a workflow design to the desired FDD database (e.g. from a test system to a production system).

The import process prompts you with questions on various kinds of objects used in the workflow design. See the following for more information on what these objects are and how they are used in the workflow design:

- The base file cabinet
- Subflows
- Summarized workflows and summarized tasks
- Lookup tables and columns
- Tasks
- Calendars
- Groups and users on user tasks, start tasks, notifications, work-o-grams, and the workflow properties
- Finishing touches and rule tokens
- Notifications
- Referenced file cabinets and fields for expected documents rules
- Integration links

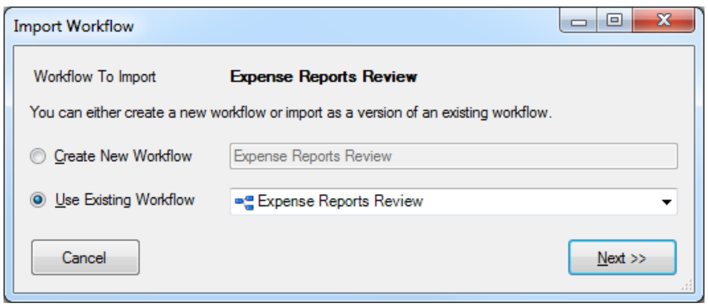
Tips:

- When mapping various objects, sometimes the **Compare Objects** option is available and can provide you with more information on what you are mapping to and from (e.g. a file cabinet field's **Description** and **Type**).
- For objects you can **Replace** (e.g. notifications, finishing touches, rule tokens, etc), right-click on the **Replace** checkbox and choose **Check All** or **Uncheck All** to change the selection for multiple objects quickly.

To import a workflow design:

1. Select **File>Import**. The **Import Workflow** dialog opens, prompting you to select the .fwx export file.
2. Browse to the .fwx export file and select it, then click **Open**.
3. In the **Import Workflow** screen, choose whether you want to:
   - **Create New Workflow:** Create a new workflow.
   - **Use Existing Workflow:** Overwrite an existing workflow, such as if you were updating the workflow to a newer version from a development system.

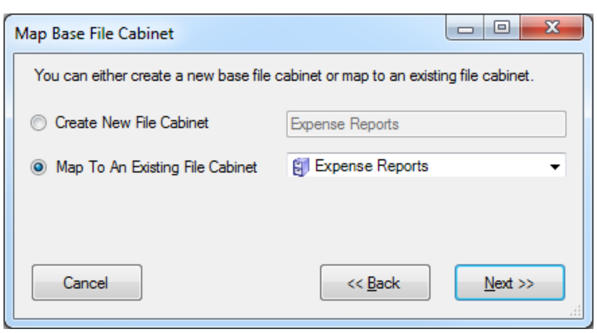
     If the export file contains more than one workflow (e.g. a subflow or summarized workflow; see Export for more information), choose which **Workflow To Import**. If you import the "parent" workflow, its subflows and summarized workflows can be imported as well as the same time. If you choose a "child" subflow or summarized workflow, just that individual workflow will be imported.

     Click **Next**.
4. If you chose to **Create New Workflow**, the **Map Base File Cabinet** screen displays.

   Choose whether you want to:
   - **Create New File Cabinet:** Create a new file cabinet for the new workflow using the same fields and properties as the original file cabinet.

     Notes:
     - A created file cabinet has no resource permissions by default. Assign permissions to the new file cabinet in Feith Control Panel (see **Feith Control Panel User Guide** for more information).
     - If the original workflow from which you made the export file was based on a virtual file cabinet, creating a new file cabinet here will make a "regular" file cabinet, not a virtual file cabinet.
   - **Map To An Existing File Cabinet:** Build the new workflow on an existing file cabinet.

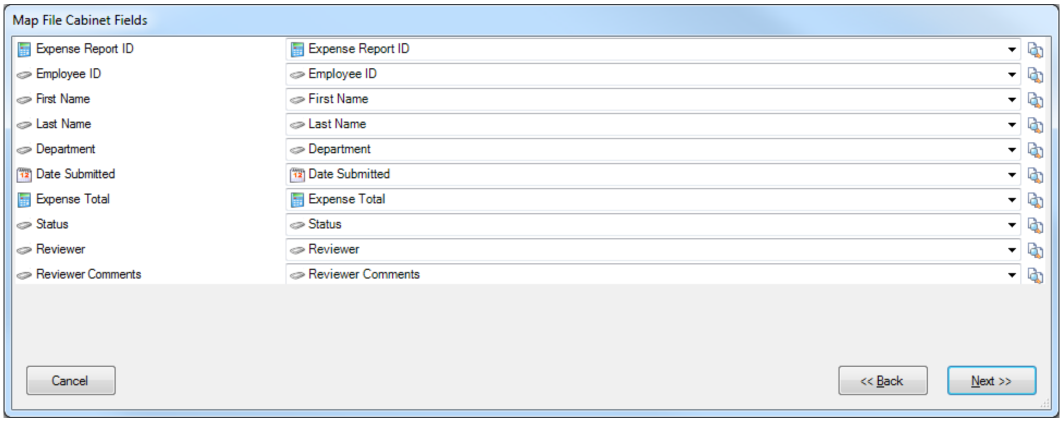
     

     Click **Next**.

5. If you are using an existing file cabinet (either because you chose to **Use Existing Workflow** or **Map To An Existing File Cabinet**), the **Map File Cabinet Fields** screen displays.

   Choose which fields map to which. Alternatively, you may **Create** a field in the file cabinet.

   Note: When mapping to a field with a different name, the name will be updated in all locations where it is used (e.g. User task Fields, Deadline routes or tasks, Expected Documents rules, file cabinet field Tokens, etc).

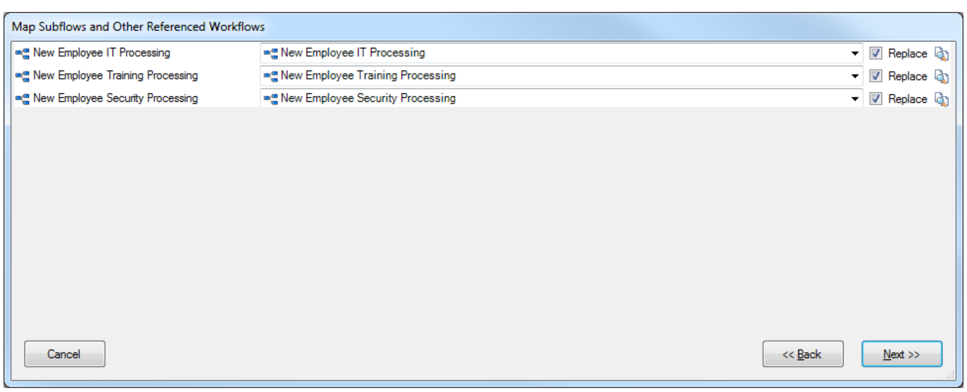
   Click **Next**.

6. Map the following if they are in the workflow design you are importing:

   a. Map Subflows and Other Referenced Workflows:

      Choose which subflows or other referenced, summarized workflows map to which and whether you want to **Replace** the existing subflows or summarized workflows. Alternatively, you may **Create** a workflow (if it was included in the export file; see [Export](#) for more information) or **Delete the Assignment** to a subflow or summarized workflow.

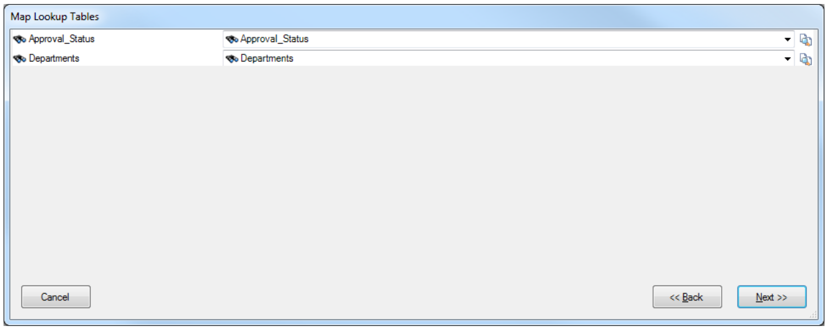
      Note: If you **Delete the Assignment** of a subflow, the subflow task in the "parent" workflow will have a dashed outline indicating it is incomplete. The subflow task must be re-configured or deleted before the workflow can be published. If you **Delete the Assignment** of a summarized workflow, the assignment is simply removed from the information task and no further configuration is required.

      Click **Next**.

b. Map Lookup Tables:

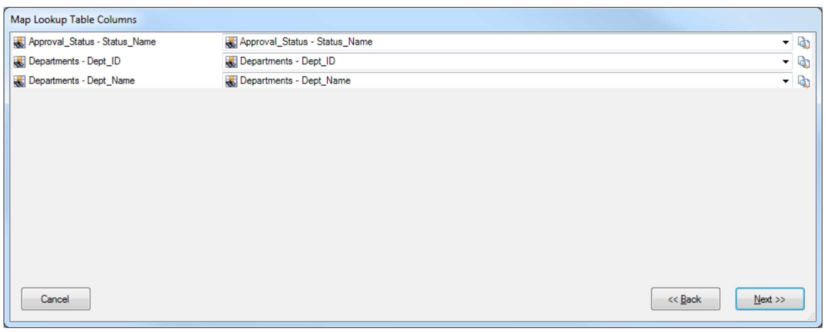
Choose which lookup tables map to which. Alternatively, you may **Create** a lookup table.



Click **Next**.

c. Map Lookup Table Columns:

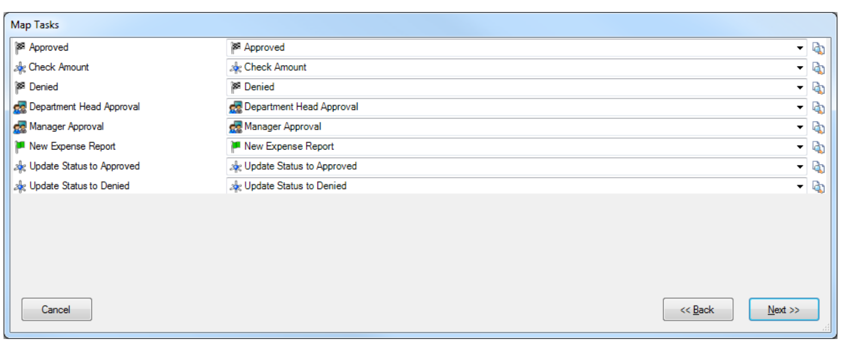
Choose which lookup table columns map to which. Alternatively, you may **Create** a lookup table column.



Click **Next**.

7. If you chose to overwrite an existing workflow (either because you chose to **Use Existing Workflow** or map to and **Replace** subflows or other referenced, summarized workflows), the **Map Tasks** screen displays.

Choose which tasks map to which. Alternatively, you may **Create** a task.



Click **Next**.

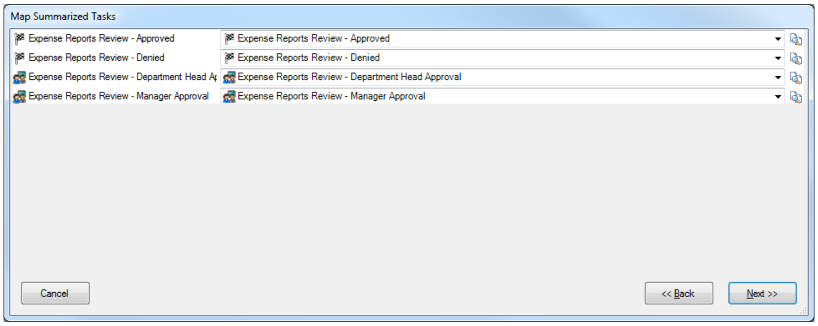
Note: At this point you cannot go **Back**, unless you chose to **Use Existing Workflow**, because the workflow, file cabinet, and lookup table entries have been established.

8. Map the following if they are in the workflow design you are importing:

   a. Map Summarized Tasks:

      If you chose to map to but *not* **Replace** subflows or other referenced, summarized workflows, the **Map Summarized Tasks** screen displays.

      Choose which tasks map to which. Alternatively, you may **Delete the Assignment** to the task in the summarized workflow.

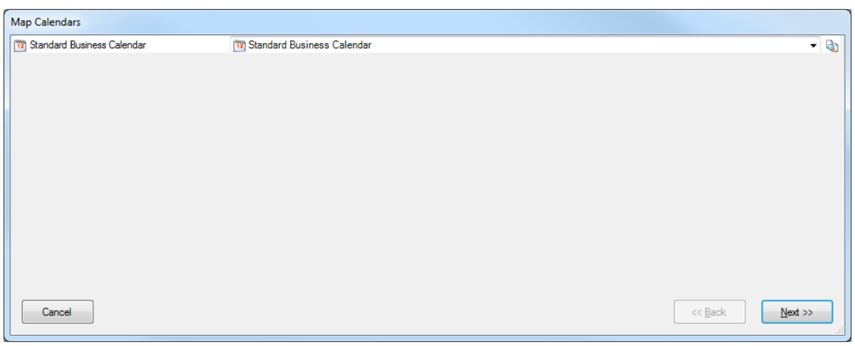


      Click **Next**.

   b. Map Calendars:

      Choose which calendars map to which. Alternatively, you may **Create** a calendar.

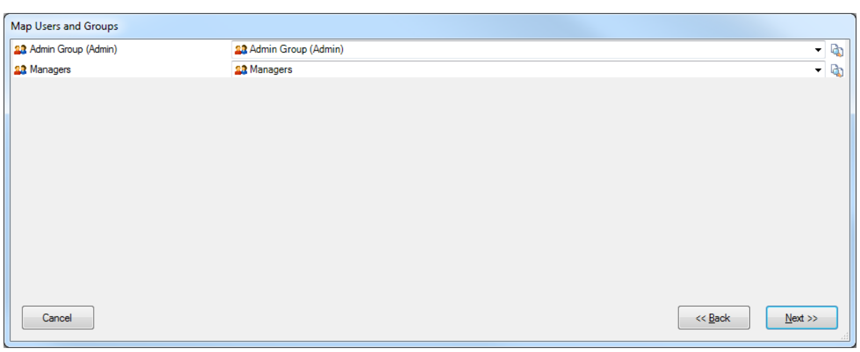
      Note: If you did not choose to include **Calendar Data** in your export (see Export for more information), the calendar you create will basically be a 24/7 calendar with no holidays.



      Click **Next**.

   c. Map Users and Groups:

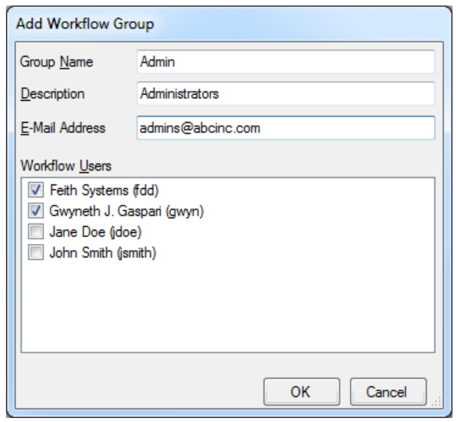
      Choose which groups and users map to which. Alternatively, you may **Create** a group or user.



Click **Next**.

To create a group:

- In the **Add Workflow Group** screen, set the following:
  - **Group Name:** Enter the group name.
  - **Description:** Optionally enter a description.
  - **E-Mail Address:** Optionally enter the group's email address.
  - **Workflow Users:** Assign one or more workflow users as members of the new group.



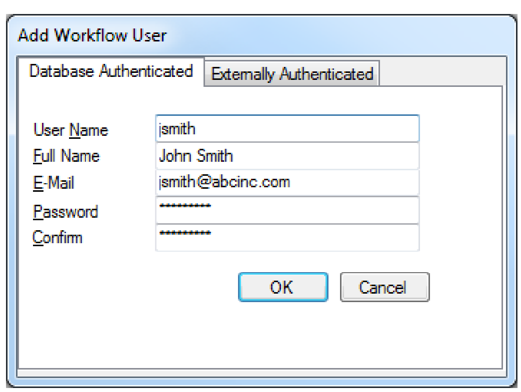
Note: If you did not choose to include **Group Permissions** in your export (see Export for more information), the group you create will have no task permissions (e.g. scan/import, index, search file cabinets). The task permissions can be set in Feith Control Panel (see **Feith Control Panel User Guide** for more information).

To create a user:

Add a **Database Authenticated** or **Externally Authenticated** (e.g. Single Sign-On) user:

- **Database Authenticated:** Unless your FDD system is configured for external authentication, users should be added as database authenticated.

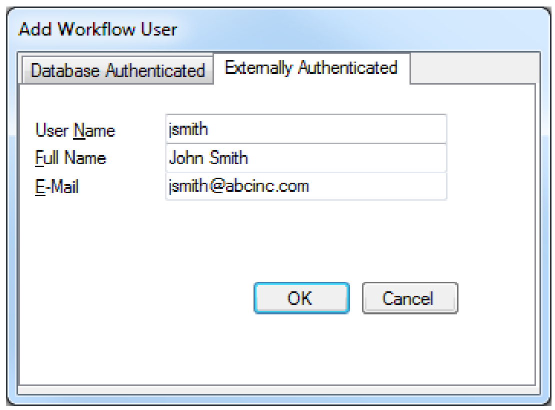
  In the **Add Workflow User** screen click the **Database Authenticated** tab and set the following:
  - **User Name:** The user login name.
  - **Full Name:** Optionally enter a full name.
  - **E-Mail:** Optionally enter the user's email address.
  - **Password:** The user's password.
  - **Confirm:** Re-enter the user's password for verification.



- **Externally Authenticated:** Users are typically added as externally authenticated when your FDD system is configured to authenticate using Kerberos, for example if you are integrating with Microsoft Active Directory. Integrating with Active Directory using Kerberos/LDAP authentication provides Single Sign-On (SSO) in addition to external authentication. Note that external authentication requires additional configuration.

  In the **Add Workflow User** screen, click the **Externally Authenticated** tab and set the following:

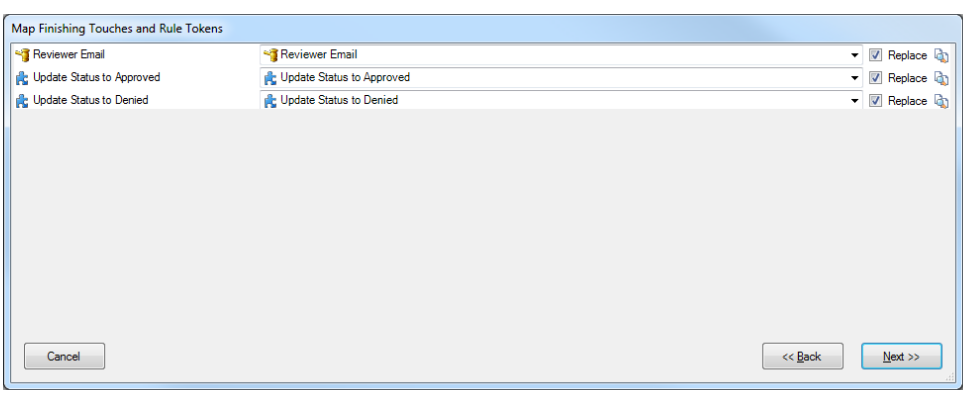
  - **Domain:** If you are running on MS SQL Server, enter the **Domain** name.
  - **User Name:** The user login name. The login name must be entered as it appears in your external authentication system (e.g. Microsoft Active Directory).
  - **Full Name:** Optionally enter a full name.
  - **E-Mail:** Optionally enter the user's email address.



Note: The created user will be a **Feith Connect** database user type, be a **Workflow User**, have no task permissions (e.g. scan/import, index, search file cabinets), and only be a member of the **public** group. You can set task permissions and group membership in Feith Control Panel (see **Feith Control Panel User Guide** for more information).

d. Map Finishing Touches and Rule Tokens:

Choose which finishing touches and rule tokens map to which and whether you want to **Replace** the existing finishing touches or rule tokens. Alternatively, you may **Create** a finishing touch or rule token.

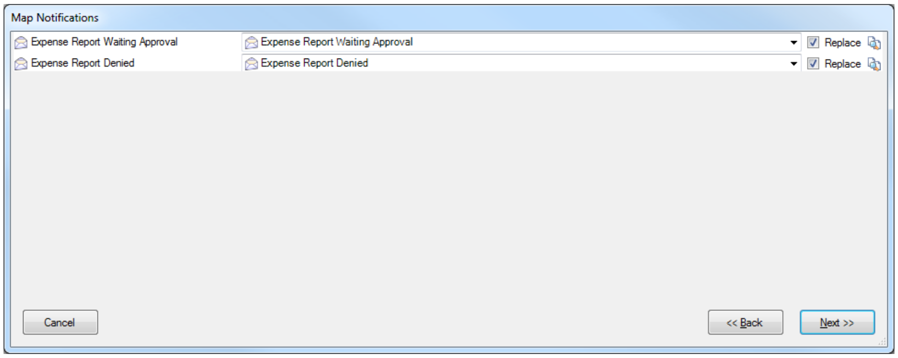


Click **Next**.

e. Map Notifications:

Choose which notifications map to which and whether you want to **Replace** the existing notifications. Alternatively, you may **Create** a notification.

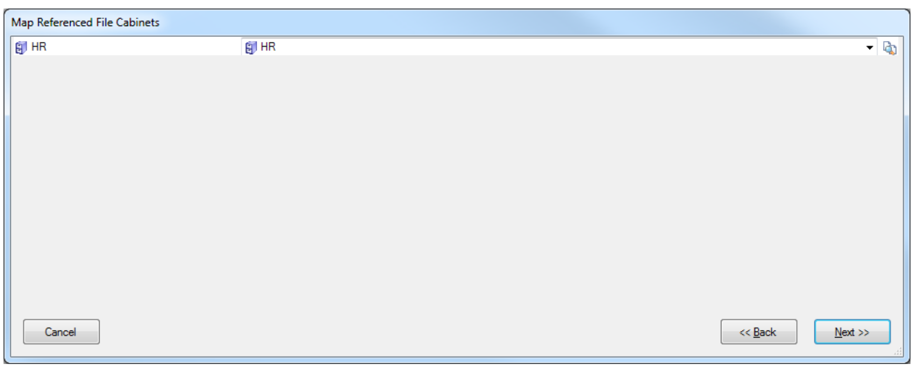
Note: Limited notifications default to **Create**, but you may map them to a non-limited notification if desired.



Click **Next**.

f. Map Referenced File Cabinets:

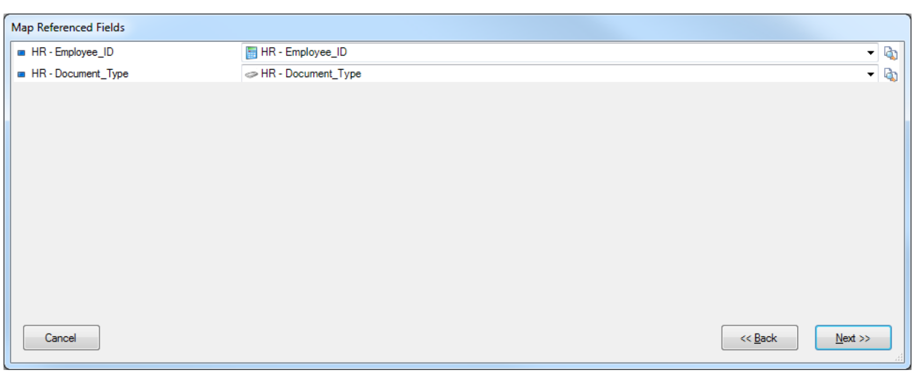
Choose which referenced file cabinets map to which for Expected Documents rules.



Click **Next**.

g. Map Referenced Fields:

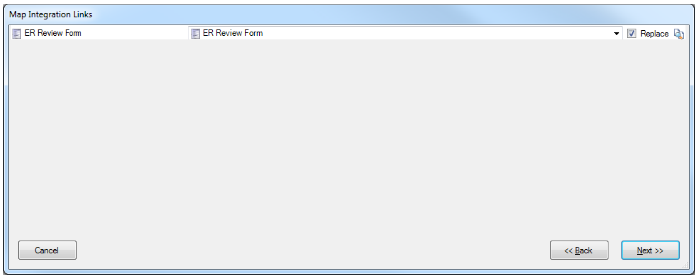
Choose which referenced file cabinet fields map to which for Expected Documents rules.



Click **Next**.

h. Map Integration Links:

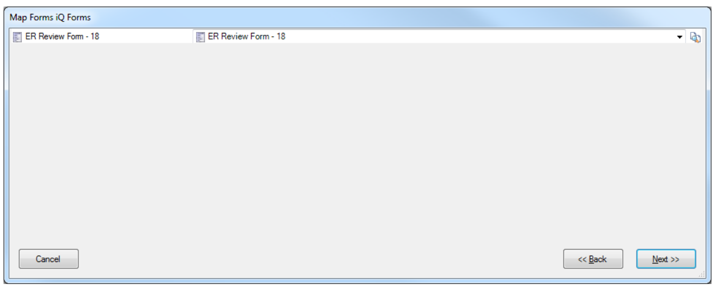
Choose which integration links map to which and whether you want to **Replace** the existing integration links. Alternatively, you may **Create** an integration link.



Click **Next**.

i. Map Forms iQ Forms:

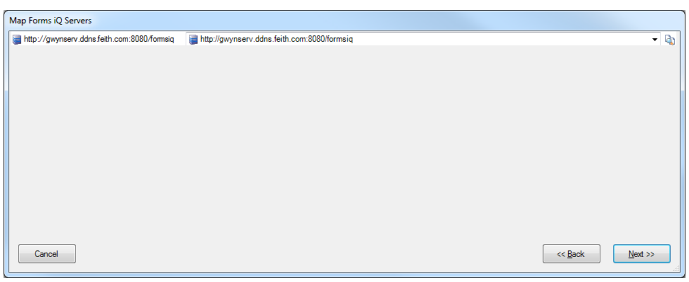
Choose which Forms iQ forms map to which for **Forms iQ** integration links.



Click **Next**.

j. Map Forms iQ Servers:

Choose which Forms iQ Servers map to which for **Forms iQ** integration links.



Click **Next**.

9. The workflow is imported. **Save**, **Check In**, or **Publish** the workflow as needed. See Save Draft, Check In Version, and Publish Workflow for more information.

   Note: If when importing a workflow you deleted any tasks containing work items, during the publication process you will be prompted with the **Move Work** dialog to move the work items to another task. Optionally check **Use for All Deleted Tasks** to move work from all deleted tasks to the same task.

If you are replacing an existing workflow as part of your import, it is strongly recommended that you do *not* publish modifications to an in-production workflow while users are working in the FDD system.

Appendix

Appendix A: Tokens

Tokens are placeholders for dynamic information that will be inserted in notifications, work-o-grams, program commands, finishing touches, rule tokens, and integration links. For example, the file cabinet field "Amount" token may be included in an email notification to review an Expense Report or the Document ID token may be used in a SQL join to look at data in an external table in a finishing touch. See Notify, Configure Work-o-gram, Configure Program, Finishing Touches, Rule Tokens, and Assign Integration Link for more information.

Notes:

- Rule tokens are only available in notifications, work-o-grams, and hub task programs. See Notify, Configure Work-o-gram, and Configure Program for more information.
- Integration links use different, but similar tokens compared to all other locations.
- The **View Document URL** token is not supported in integration links, finishing touches, or rule tokens.
- File cabinet field tokens are generally not available when creating objects from the **Tools** menu (e.g. **Tools>Notification Administrator**).
- For Work-o-grams, only the file cabinet field tokens (**Field *field name***) and rule tokens (**Rule # - *rule name***) are supported.

TOKEN NAME	TOKEN	DESCRIPTION
Document ID	{DOC_ID}	The internal ID of the work item.
Field *field name*	{FC_VALUE|*field name*}	The work item's value from the selected file cabinet field. All fields in the workflow's base file cabinet are in the token list.
Priority	{WF_DOC_PRTY}	The priority of the work item. See Priority for more information.
View Document URL	{URL_VIEW_DOC}	A WebFDD View Document URL to the work item. An end user may click the URL and login to WebFDD to view the work item.
CUser	{WF_DOC_CUSER}	The user who created the work item.
CTime	{WF_DOC_CTIME}	The date and time the work item was created.
MUser	{WF_DOC_MUSER)	The user who last modified the work item.
MTime	{WF_DOC_MTIME}	The date and time the work item was last modified.
Workflow Name	{WF_NAME}	The name of the workflow containing the work item.
Task Name	{WF_TASK_FC}	The name of the task containing the work item.
Task View	{WF_TASK_TBL}	The name of the task view containing the work item.
Base FC Name	{WF_BASE_FC}	The name of the workflow's base file cabinet.
Base FC Table	{WF_BASE_TBL}	The name of the workflow's base file cabinet table.
Task Deadline	{WF_TASK_DL}	The time of a task deadline defined by a deadline route. See Deadline Route for more information.

Workflow Deadline	{WF_DL}	The time of the workflow deadline defined by the deadline task. See Deadline Task for more information.
Timestamp	{DATETIME}	The current date and time.
Rule # - *rule name*	{RULE|#}	The value(s) returned by the custom SQL in the rule token. See Rule Tokens for more information.

More Tokens

In addition to the tokens above, Rex supports the below tokens in notifications, hub task programs, finishing touches, and rule tokens. These tokens must be entered by hand and some require additional information.

TOKEN	DESCRIPTION
{DOC_CUSER}	The user who created the FDD document.
{DOC_CTIME}	The date and time the FDD document was created.
{DOC_MUSER}	The user who last modified the FDD document.
{DOC_MTIME}	The date and time the FDD document was last modified.
{GRP_EMAIL|*group id*}	The specified group's email address based on the given group ID. You may specify multiple group IDs by separating them with commas. **Note:** If you are using Microsoft Outlook as your email client, Outlook may complain about sending an email to a list of comma-separated email addresses. You can change this, for example, in Outlook 2010 by turning on the option **Commas can be used to separate multiple message recipients** under **File>Options>Mail>Send messages**.

{BUSINESS_DAYS|*interval*}	The number of calendar days to arrive at the business day specified by the given interval. Days are calculated from the current date The interval is provided in the format: *calendar number years:months:days:hours:minutes:seconds optionally specify date* For example: • **BUSINESS_DAYS{1 0:0:7:0:0:0}** uses the **Standard Business Calendar** to go forward **7** business days from the current date. On Monday 7/1/2013, **7** business days forward would be 7/11/2013 because July 4th and the one weekend are skipped, and therefore the token returns a value of **10** calendar days. • **BUSINESS_DAYS{1 0:0:-7:0:0:0}** uses the **Standard Business Calendar** to go backward **7** business days from the current date. On Monday 7/1/2013, **7** business days backward would be 6/27/2013 because the two weekends are skipped, and therefore the token returns a value of **-11** calendar days.
{ENV|*environment variable*}	The specified environment variable from the machine where Rex is running.

Appendix B: Command Line Arguments

Workflow iQ Manager may be run from a command prompt to perform a few simple operations, including creating a workflow, exporting a workflow, and importing a workflow.

Note: When exporting from command line, subflows and other, referenced summarized workflows are not included in the export file. See Export for more information.

Arguments

ARGUMENT	EXAMPLE	DESCRIPTION
-u [user name]	-u jsmith	Login user name.
-p [password]	-p jsmith123	Login user's password.
-s [database connect string]	-s fdd	Database to which you want to connect.
-n [new workflow name]	-n AP	When creating a new workflow, the name of the new workflow.
-f [base file cabinet]	-f AP	When creating a new workflow, the name of the base file cabinet on which you want to build the new workflow.
-g [administration group]	-g AP_Admin	When creating a new workflow, the name of the workflow's administration group.
-w [workflow name]	-w AP	When exporting a workflow, the name of the workflow you want to export.
-x [export file name]	-x C:\Users\John\Desktop\AP_export.fwx	When exporting a workflow, the name of the workflow export file and, if desired, the path to the location where you want the file saved. The file must have the extension ".fwx". If no path is specified, the export file is saved in your operating system user's folder (e.g. C:\Users\John).

-c	-c	Close Workflow iQ Manager after the operation is complete (e.g. after export).
-q	-q	Run in "quiet" mode. Currently this only applies to export by removing the export's success message.
-a [action]	-a publish	Perform an action. The only available action at this time is "publish" (e.g. publish a workflow you just imported).

Notes:

- Values with spaces should be enclosed in double quotes (e.g. **-w "Accounts Payable"**).
- There is no specific argument for import because Workflow iQ Manager knows that you want to import when you give it an .fwx file.

Examples

For example, creating a workflow called "AP" built on the "AP" file cabinet with the administration group "AP_Admin":

```
"C:\Feith\Workflow iQ\WorkflowiQManager.exe" -u jsmith -p jsmith123 -s fdd
-n AP -f AP -g AP_Admin
```

For example, exporting a workflow called "AP" to a file called "AP_export.fwx" on your desktop in quiet mode and then closing Workflow iQ Manager after the export:

```
"C:\Feith\Workflow iQ\WorkflowiQManager.exe" -u jsmith -p jsmith123 -s fdd
-w AP -x C:\Users\John\Desktop\AP_export.fwx -q -c
```

For example, importing a workflow from a file on your desktop called "AP_export.fwx" and then publishing the workflow:

```
"C:\Feith\Workflow iQ\WorkflowiQManager.exe" -u jsmith -p jsmith123 -s fdd
C:\Users\John\Desktop\AP_export.fwx -a publish
```

Appendix C: Keyboard Shortcuts

Workflow iQ Manager supports the following keyboard shortcuts:

SHORTCUT	ACTION
CTRL+N	Create new workflow (**File>New**).
CTRL+O	Open workflow (**File>Open**).
CTRL+S	Save draft of workflow (**File>Save Draft**).
CTRL+P	Print workflow map (**File>Print**).
CTRL+Z	Undo last action (**Edit>Undo**).
CTRL+Y	Redo last action (**Edit>Redo**).
CTRL+X	Cut object (**Edit>Cut**).
CTRL+C	Copy object (**Edit>Copy**).
CTRL+V	Paste object from clipboard (**Edit>Paste**).
CTRL+L	Clone object (**Edit>Clone**).
DELETE	Delete object (**Edit>Delete**).
CTRL+A	Select all objects (**Edit>Select All**).
CTRL+TAB	Go to next workflow tab (**View>Next Workflow**).
SHIFT+CTRL+TAB	Go to the previous workflow tab.
F1	Open Workflow iQ Manager Help (**Help>Feith Workflow iQ Manager Help**).
CTRL+1	Change to **Pointer** tool.
Middle-click (mouse wheel) workflow tab	Close the workflow tab.
F5	Refresh work item counts.

Glossary

A

Ad Hoc route: Allows a user to send a work item from a task to any other task on an as-needed basis.

Auto-Distribute route: A route that distributes work items between several tasks.

Automatic route: A route that automatically moves a work item to the next task.

B

Base File Cabinet: A workflow is based on a File Cabinet. A file cabinet is a permanent storage area for indexed documents. Each file cabinet is defined by the index fields (e.g., name, date, amount) it uses to organize stored images. Each entry in the file cabinet consists of a group of index field values (e.g., John Smith, 04/06/2009, $140.43) and the images associated with those values.

C

Calendar: Defines the calendar by which the workflow should operate. A calendar defines business hours and company holidays, and is used to determine when deadlines, reminder notifications, and priority changes should occur.

Check In Version: A "Non-Published" version of the workflow is checked in to the workflow's version history. Other designers can see the non-published version and check it out for modifications.

Check Out: A workflow must be checked out in order to modify its design. The user who checks out the workflow has that workflow locked and no other user can modify the design while they are working on it.

Conditional route: A route that moves work items based on a specified condition.

D

Deadline route: A route that moves expired work items from a task.

Deadline task: A deadline that applies to the entire workflow. When the workflow deadline expires for a work item, the item is automatically sent to the deadline task.

Delete Publication: Removes a workflow from production in the FDD system. However, the workflow design and version history are saved. A deleted workflow can be re-published if desired.

Document: A permanent grouping of related pages. Documents reside in File Cabinets. The pages in a document were indexed a set of index values.

E

End task: A task that is the end point of the workflow.

Error Route: A route that moves errored work items from a task.

F

FDD: Feith Document Database (FDD) is Feith's imaging and document management system. The documents stored in FDD can be sent through a workflow in order to accomplish a desired process.

Feith Control Panel: The application which handles the administration of the FDD system.

File Cabinet: A workflow is based on a File Cabinet. A file cabinet is a permanent storage area for indexed documents. Each file cabinet is defined by the index fields (e.g., name, date, amount) it uses to organize stored images. Each entry in the file cabinet consists of a group of index field values (e.g., John Smith, 04/06/2009, $140.43) and the images associated with those values.

Finishing Touch: A SQL statement that executes each time a work item leaves the task to which the rule is assigned.

Folder: A container for multiple documents.

Forms iQ Designer: A Feith application for designing web forms that are used in the FDD system.

H

Hub task: A node in the workflow. This task type is typically used as an intersection in the workflow (e.g., a task from which to conditionally route documents). The hub task may also be used to run a program.

I

Index Values: The values associated with a document or folder; metadata (e.g., invoice id, vendor id, total, date).

Information route: A route used to connect information tasks for illustrative purposes only.

Information task: A task used for illustrative purposes only to represent steps that occur outside the workflow process or to summarize work item counts from a set of tasks.

Integration Link: A link that is optionally assigned to a user task when action is required outside of FDD in order to process the work item. If a task has an integration link assigned to it, the link will launch automatically when you retrieve a work item from that task. Three types of links are available: Forms iQ link, application link, and URL link.

L

Lookup Table: A list of suggested index values; can be used when indexing or searching. Configured in Feith Control Panel.

M

Manual route: The following route types are manual routes: Single-Select route, Multi-Select route, and Optional route. A manual route moves work items based on a workflow user's route selection in the client (FDD or WebFDD).

Multi-Select route: A manual route that moves work items based on the workflow user's route selection. This route type requires the user to make a selection, and they can select multiple routes if desired.

N

Notification: An email sent to workflow users to notify them of events in the workflow process.

O

Optional route: A manual route that moves items based on the workflow user's route selection. This route type does not require the user to select it; it is optional.

Overflow: When the number of work items in a user task gets too high, additional users are temporarily assigned to the task to handle the workload. Once the overflow of work has been addressed, the additional users are removed.

P

Priority: The priority of a work item, assigned on a scale of 1 to 9 (where 1 is the highest priority).

Publish: Publishing a workflow puts that workflow into production.

Purge: Purging a workflow completely removes the workflow and its version history from the FDD system.

R

Rendezvous task: A task that collects and combines copies of a work item. When a work item is routed to a rendezvous task, it remains in the task until all other copies (in the preceding tasks) arrive at the rendezvous task. When all copies have reached the rendezvous task, the work item is then routed to the next task.

Rex: The Feith Rules Engine (REX) processes work items according to the workflow design (e.g., routes work items, sets deadlines, sends e-mails, handles resource allocation, etc).

Route: Moves work items from task to task, defining how and why the work arrives at a particular task.

S

Save Draft: Saves a draft of the workflow and keeps it checked out by the user that is working on the design. Saving a draft does not publish the workflow, nor does it add to the workflow's version history.

Single-Select route: A manual route that moves work items based on the workflow user's route selection. This route type requires the user to make a selection, and they can only select one of the routes.

Start task: The task which is the entry point to the workflow. All work items added to the workflow are initially sent to the start task. A start task is automatically added to the workflow design when you create the workflow.

Subflow task: A task that routes a work item from a parent workflow into a subflow.

Super Administrator: A special user type that has more authority than the typical user. See the Feith Control Panel User's Guide for more information.

T

Task: A node in the workflow where work is performed.

Task Permission: Defines what tasks a user or group can perform in the FDD system (e.g., scan, index, delete page, etc).

U

User task: A node in the workflow where FDD users retrieve and process work items in a client (FDD or WebFDD).

V

Version History: All versions that have existed for a given workflow are recorded in its version history.

W

Wait-For task: A task that waits for a specified condition to be true.

Withdraw: Removes a work item from the workflow. Note that withdrawing a work item from a workflow does not delete the work item from FDD.

Work Info: The list of work items that are in a given task.

Work Item: The general term applied to items going through the workflow. A work item is either a document or a folder.

Work Item Count: The number of work items in a workflow. The total work item count is displayed on the lower left of the screen. The work item count is also displayed per task as a number in a hexagon displayed over each task.

Work-o-grams: An email sent to a specified user for each work item that enters a task. The user can process the work item by responding to the work-o-gram email.

Workflow: A network of tasks that moves an FDD document or folder through a set of defined rules.

Index