Virtual Office WORK-FLOW

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Disclaimer: The screen shots below is for training purposes, it might be not exactly the same as yours.

Chapter 1: Introduction to Virtual Office Work-flow

Workflow is the automation of a business process, in whole or part, during which documents, information or tasks are passed from one participant to another for action, according to a set of procedural rules.

Nowadays, hundreds or, may be thousands of work processes' flowing within a company. With a **Standard** procedure, a company can:

1. Improved efficiency - automation of many business processes results in the elimination of many unnecessary steps
2. Better process control - improved management of business processes achieved through standardizing working methods and the availability of audit trails
3. Improved customer service   consistency in the processes leads to greater predictability in levels of response to customers
4. Flexibility   software control over processes enables their re-design in line with changing business needs
5. Business process improvement - focus on business processes leads to their streamlining and simplification

Virtual Office Work-flow enables you to:

1) Create your own tasks/jobs procedures templates
2) Assigning task to users
3) Monitor the task flow
4) Ensure the task is under control
5) Learn to adapt company's standard procedure

Workflow allow 2 main types of user to manage the flows. **Admin** is the user who have the access to manage/design the template and perform flow administration. User allow to perform the assigned job which come with the flow.

Table below shows the differences of accessibility between Admin and user:

Task	Admin	User
Create/ Edit/ Delete Template	**Yes**	**No**
Add/ Remove user to Group	**Yes**	**No**
Create/ Edit Type and Category	**Yes**	**No**
Transfer Flow	**Yes**	**No**
Create/ Edit Flow	**Yes**	**Optional**
Start a flow	**Yes**	**Yes**
End a Flow (By End Button)	**Yes**	**Optional**
View Template/ Flow listing	**Yes**	**Yes**

Table 1.1

Tips

Follow the sequence below and you will be able to manipulate VO

1 → 2 → 3 ....

Chapter 2: Administrative Settings

First, you must have the access rights to administrate the Work-flow.

Log onto your virtual office, go to BizApp > Work-flow.
If you see You don't have enough privileges to continue message, means you do not have the access rights to this module. Please contact your internal Virtual Office Administrator for more details.

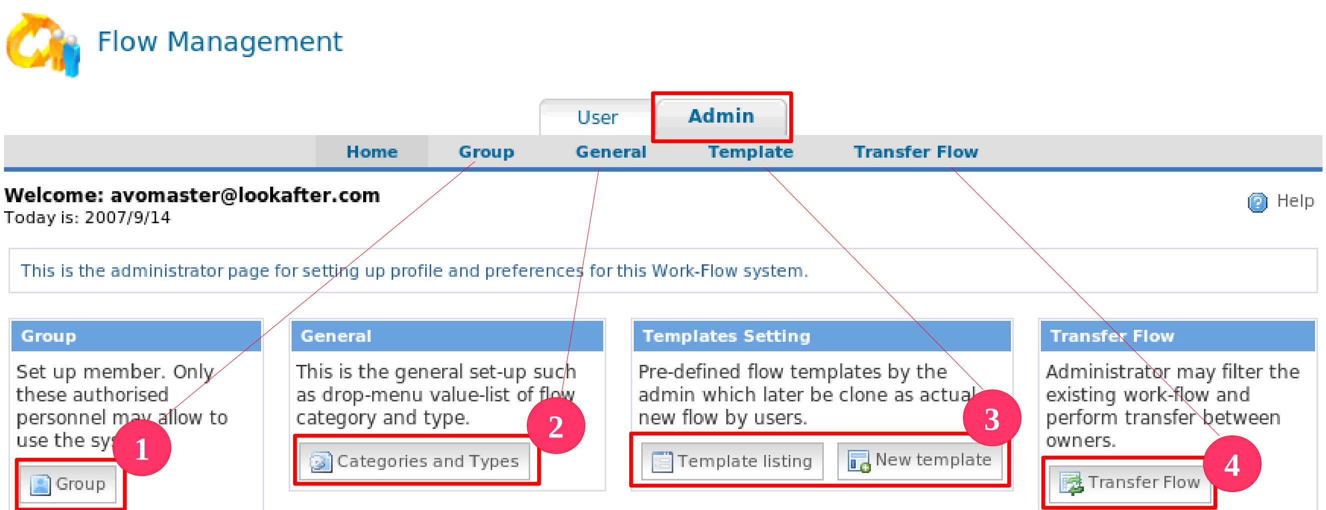
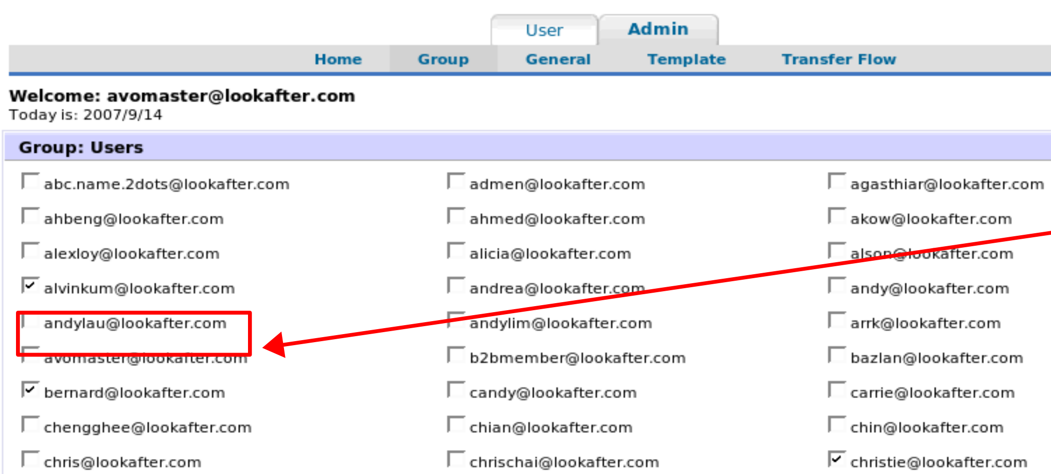


Figure 2.1

To start administrate your workflow, please go to the Admin mode and follow the following steps:

1 Select workflow user (figure 2.2)



To add user(s) to workflow group, go to **Admin Tab** > **Group**, Select the desired user and place a check on the checked box. Click update to save the list.

2 Add Category/ Type (General)

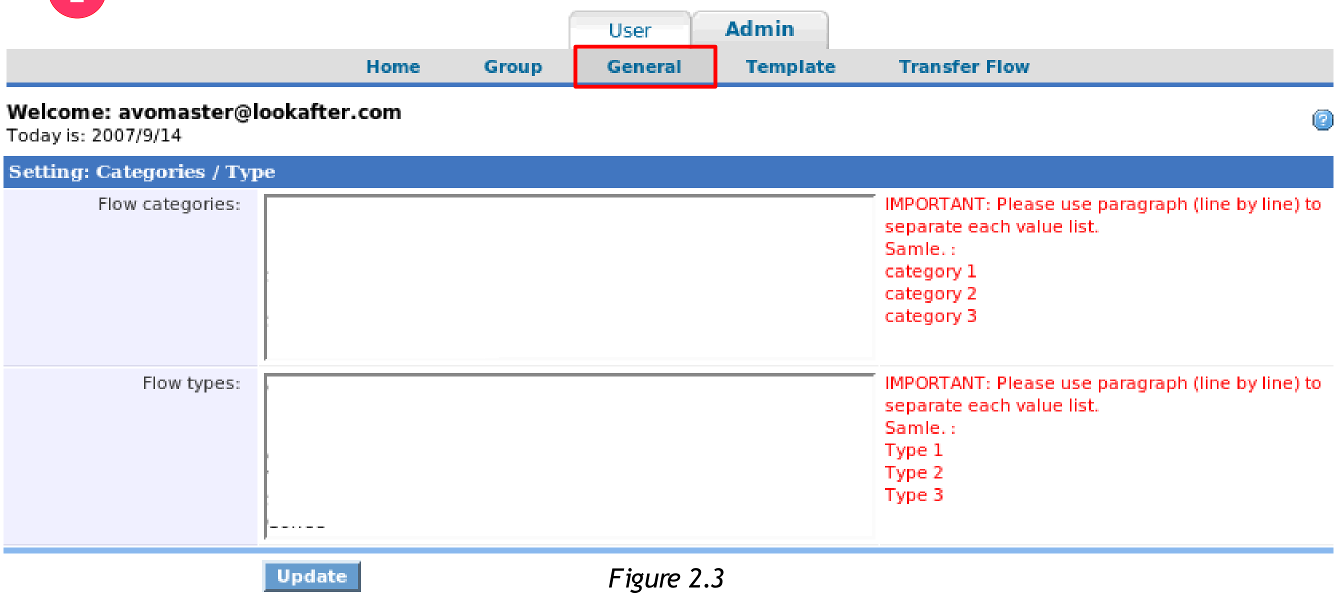


Figure 2.3

Define your **category** and **type** here (figure 2.3)
For Example, enter a new **category** call **Administration** and a new **type** call **Purchase Request**.

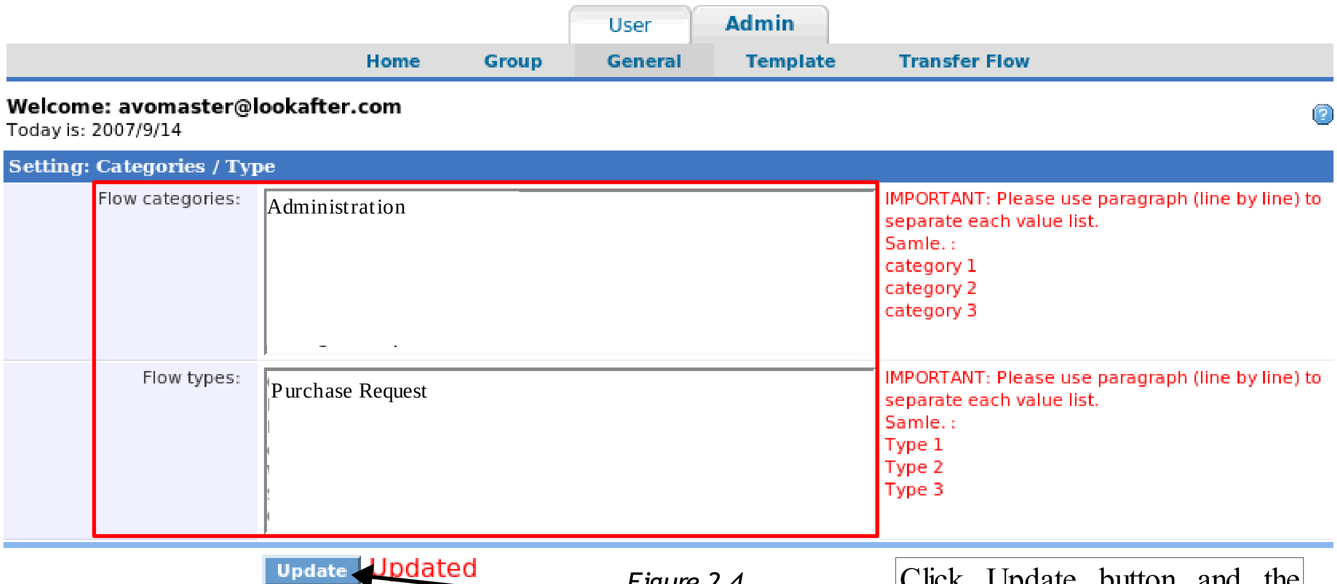


Figure 2.4

Click Update button and the new category and type will be added to the list (figure 2.4)

figure 2.4 showed the new added **Category** and **Type**

Tips

*For adding new **Category** or **Type**, key into the <u>new line</u> will do.*

3 Add/Edit/Manage the Templates (figure 2.5)

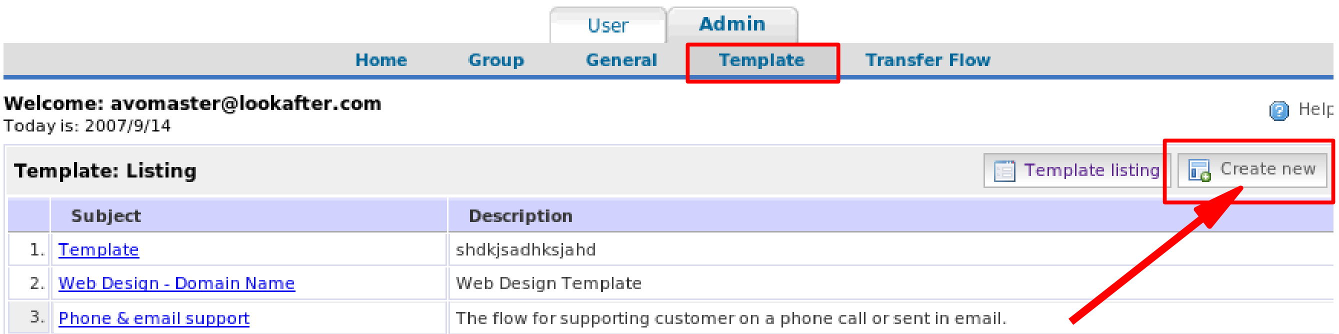


Figure 2.5

You can perform:

1) View template listing   View your existing template here
2) Edit existing template   Click on subject of template to edit any existing templates
3) Create new template   Click on **Create New** on your top right corner for create a new template

In this manual, we are going to use '**Purchase Request**' as the example. Here is the scenario:

1) Bernard from HR department send a purchase request to Administration Department for requesting purchase of stationery.
2) Ahbeng is the Manager of HR department.
3) Sarah is the Manager of Administration. She is the person who give approval for all purchase request.
4) Aaron is the staff of purchase department.

Click on **Create New** for create a new template. Figure 2.6 will show you the steps on creating a new template.

Steps for Create New Template (figure 2.6)

Step 1:

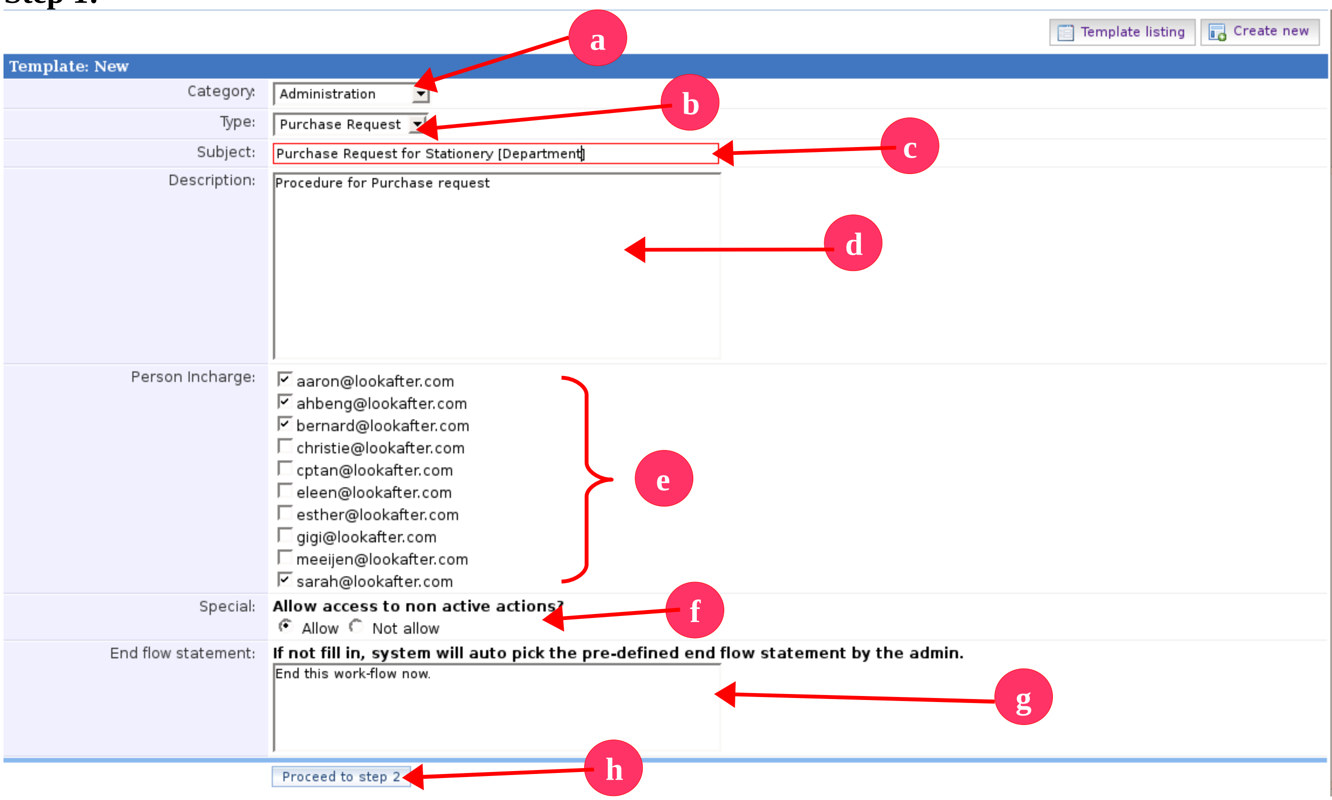


Figure 2.6

a) Drop down the dropdown menu to choose a suitable Category

b) Select a type for this template

c) Enter a subject for this template

d) Enter description for this template

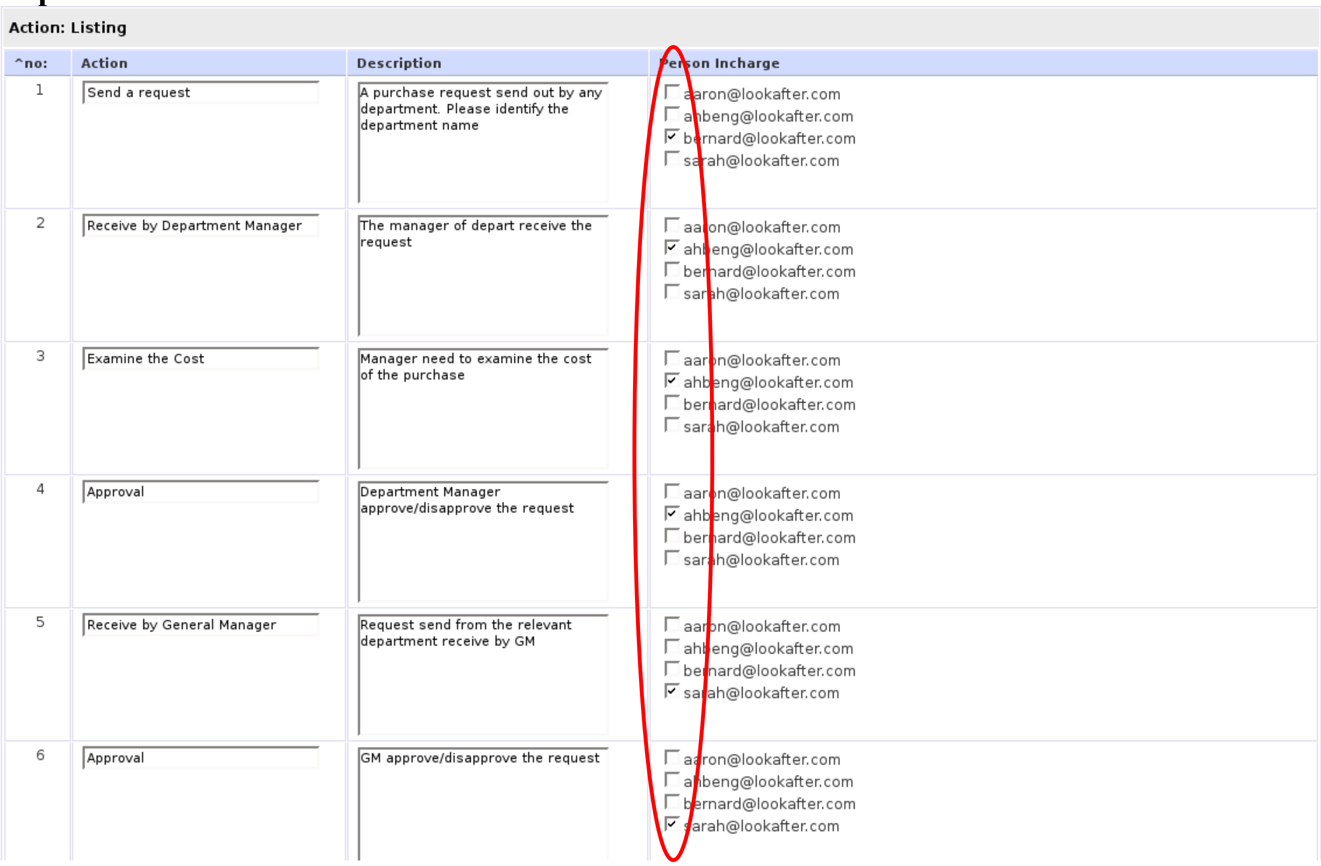
e) Select the person(s) in charge

f) Allow access to non active actions? - if this option set to **allow**, user will be able to view and edit those non active action during a flow is being executed (More details in Chapter 3)

g) While ending a flow, what message will be display

h) Click this to proceed to Step 2

Step 2:



Action: Listing

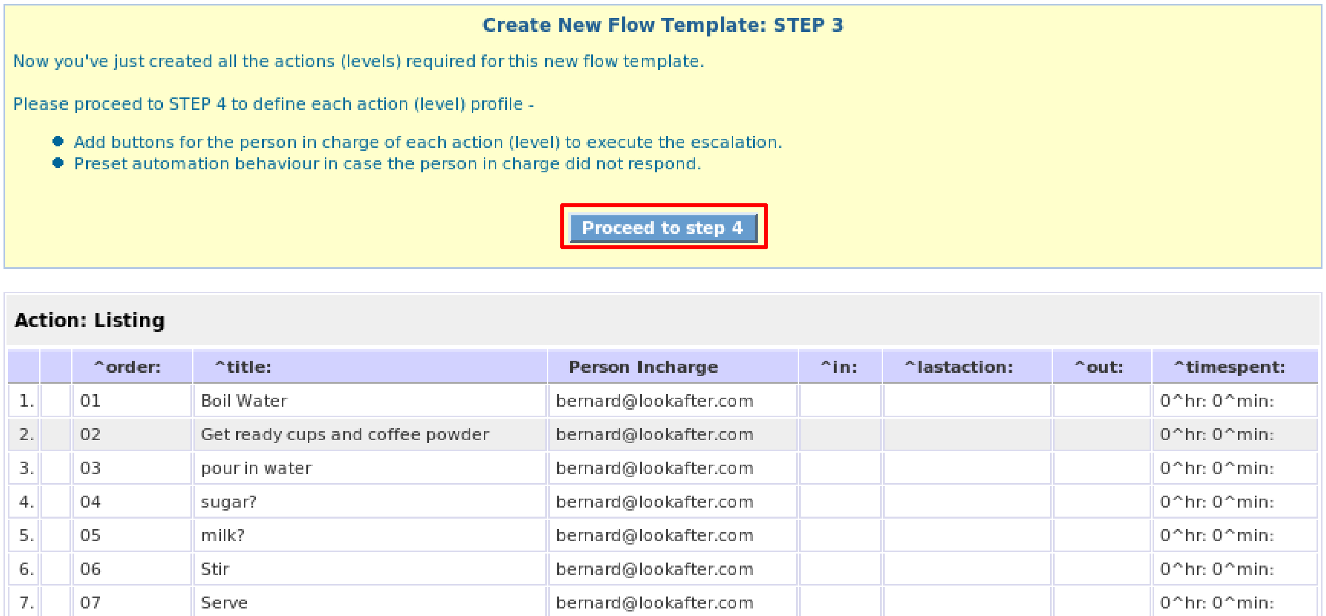
^no:	Action	Description	Person Incharge
1	Send a request	A purchase request send out by any department. Please identify the department name	☐ aaron@lookafter.com ☐ ahbeng@lookafter.com ☑ bernard@lookafter.com ☐ sarah@lookafter.com
2	Receive by Department Manager	The manager of depart receive the request	☐ aaron@lookafter.com ☑ ahbeng@lookafter.com ☐ bernard@lookafter.com ☐ sarah@lookafter.com
3	Examine the Cost	Manager need to examine the cost of the purchase	☐ aaron@lookafter.com ☑ ahbeng@lookafter.com ☐ bernard@lookafter.com ☐ sarah@lookafter.com
4	Approval	Department Manager approve/disapprove the request	☐ aaron@lookafter.com ☑ ahbeng@lookafter.com ☐ bernard@lookafter.com ☐ sarah@lookafter.com
5	Receive by General Manager	Request send from the relevant department receive by GM	☐ aaron@lookafter.com ☐ ahbeng@lookafter.com ☐ bernard@lookafter.com ☑ sarah@lookafter.com
6	Approval	GM approve/disapprove the request	☐ aaron@lookafter.com ☐ ahbeng@lookafter.com ☐ bernard@lookafter.com ☑ sarah@lookafter.com

Figure 2.7

Design the action(s) for this flow and make sure the person(s) in charge is/are selected. Once you have finished designing all required/needed actions, click on **Proceed to step 3** button proceed to the next step.

*Note: **Person In-charge** (PIC) – the person(s) in-charge under the **Person Incharge** column is the assignee(s) to carry out the task and/or to ensure it is completed accordingly. The PIC will be alerted with a notification email when it is his or her turn to carry out the task assigned. The notification email will be repeatedly sending to the assignee(s) if the task is not done within the pre-defined time frame or taken over by another PIC or skipped to another level. The frequency of the email notification depends on the setting.*

Step 3:


Create New Flow Template: STEP 3

Now you've just created all the actions (levels) required for this new flow template.

Please proceed to STEP 4 to define each action (level) profile -

- Add buttons for the person in charge of each action (level) to execute the escalation.
- Preset automation behaviour in case the person in charge did not respond.

Proceed to step 4

Action: Listing

		^order:	^title:	Person Incharge	^in:	^lastaction:	^out:	^timespent:
1.		01	Boil Water	bernard@lookafter.com				0^hr: 0^min:
2.		02	Get ready cups and coffee powder	bernard@lookafter.com				0^hr: 0^min:
3.		03	pour in water	bernard@lookafter.com				0^hr: 0^min:
4.		04	sugar?	bernard@lookafter.com				0^hr: 0^min:
5.		05	milk?	bernard@lookafter.com				0^hr: 0^min:
6.		06	Stir	bernard@lookafter.com				0^hr: 0^min:
7.		07	Serve	bernard@lookafter.com				0^hr: 0^min:

Figure 2.8

On step 3 (figure 2.8), review all of the entered actions and click on **Proceed to step 4** to go to the next step.

Step 4:

Action button

User can preset up to 10 action buttons for each level. The use of the action button is for denying or accepting certain steps in the flow. You can define any action button which meets your requirement or suit your step(s) as long as it is meaningful.

Action	**Example**
Denying	If the request of purchase deny by department manager, the request could not complete and it won't forward to purchasing department. The flow shall end from here. Therefore, while the workflow Admin design the template, he/she can assign an action button called Disapprove for instance to decline the request.
Accepting	When the department manager approve the request, he/she can hit the action button Approve to accept the request for instance. The workflow admin should design a template which can meet the requirement for a business process.

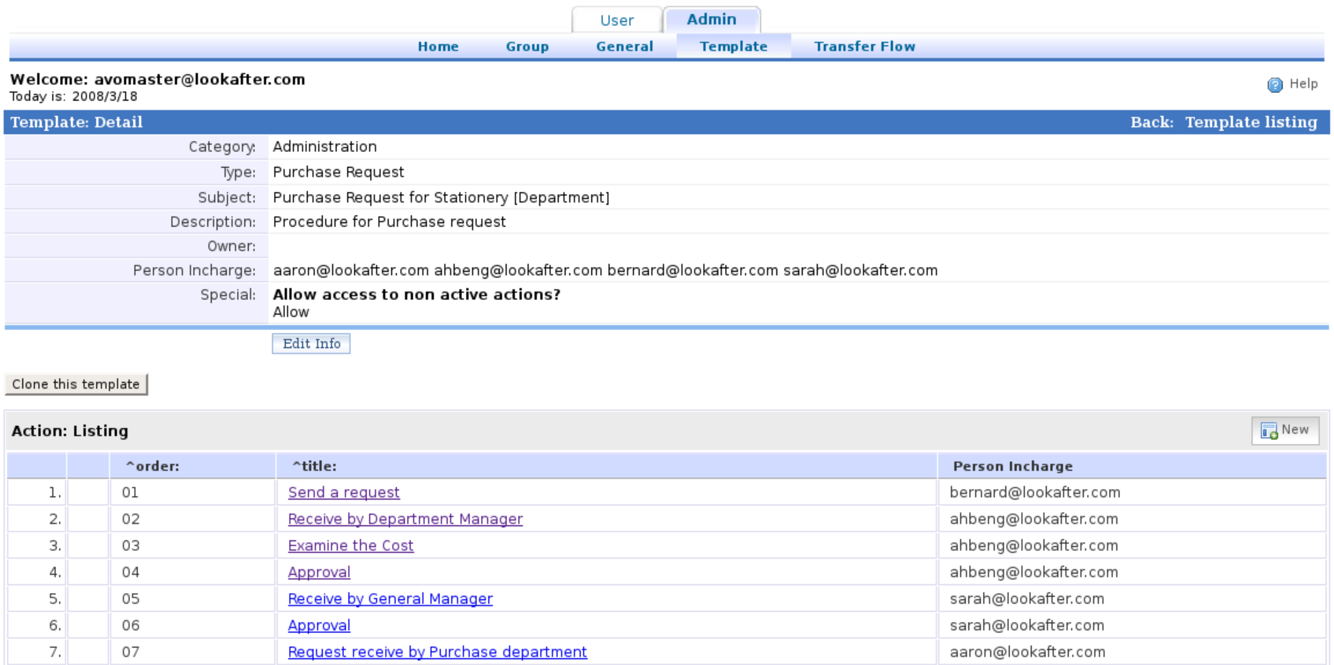


Figure 2.9

When you on Step 4, screen above (figure 2.9) will showed on your screen. On this stage, template has been created successfully.

Note: once the template created, user will be leaded to Edit Action Detail page (figure 2.9). You may continue design the action button for this template or exit from this stage.

Click on the title of each level to edit/design the pattern of the flow.

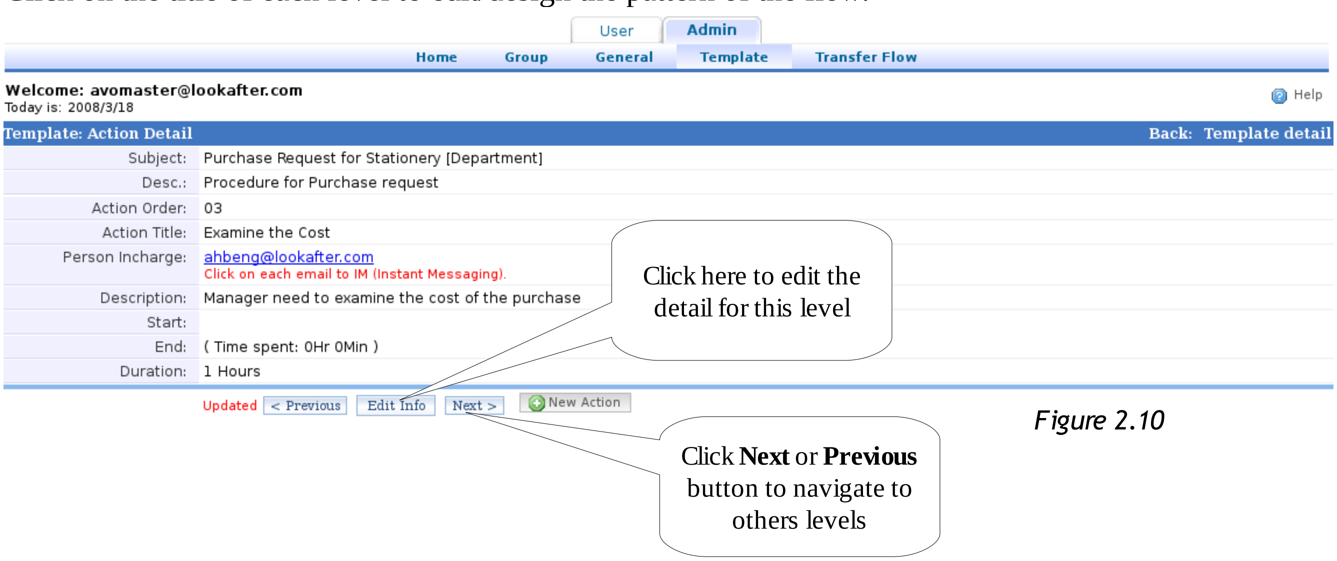


Figure 2.10

Figure 2.10 show u the page after click on the title name. Click **Edit Info** to edit the detail for this action level. Below is the page for **Edit Info** (figure 2.11).

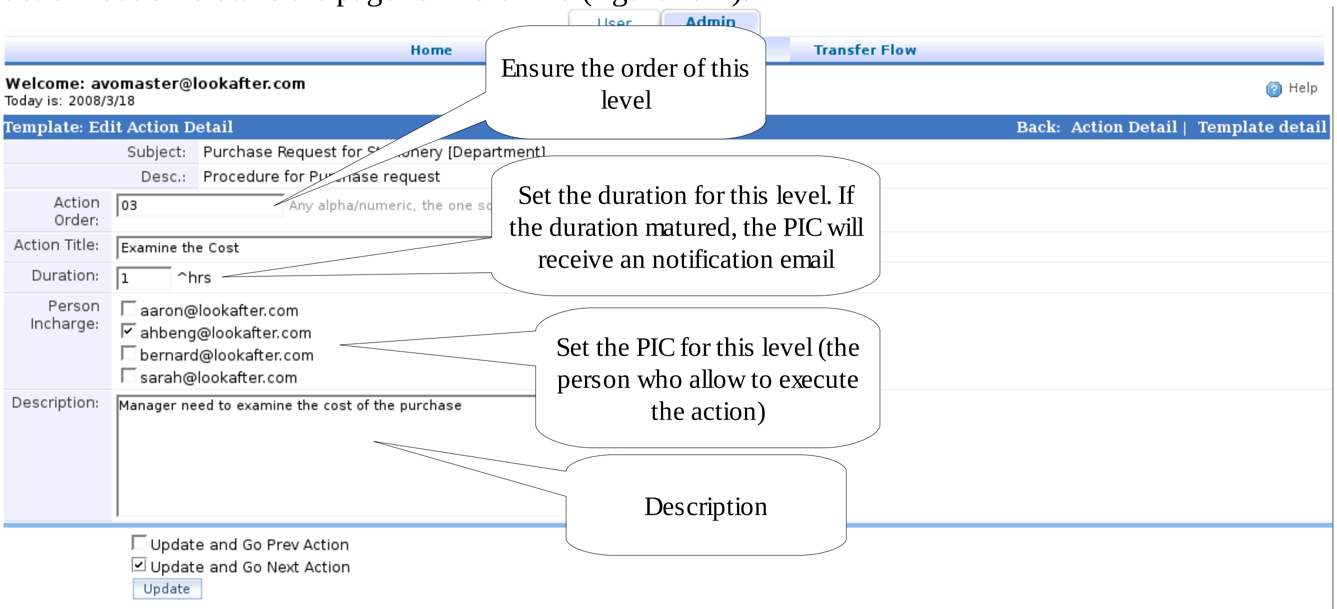
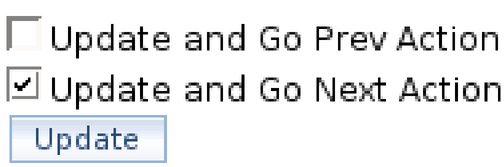


Figure 2.11

Update and Go Prev Action	When this option selected, once hit the **Update** button, the page will navigate to Previous level for this flow
Update and Go Next Action	When this option selected, once hit the **Update** button, the page will navigate to Next level for this flow



<u>Add action button to each level</u>

After the settings done on figure 2.11, scroll down further the page, and a page as below (figure 2.12) will display. This is the page allow workflow admin to assign action button(s).

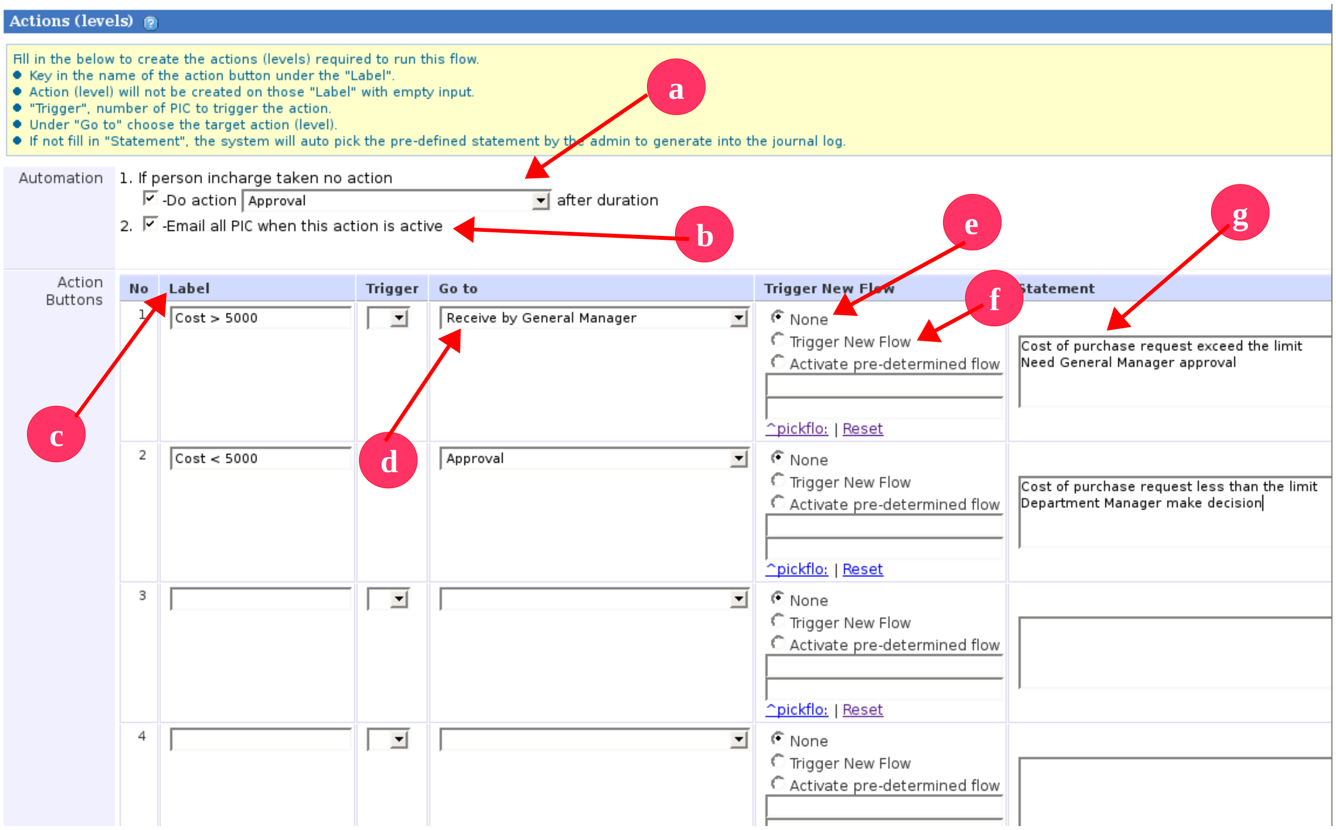


Figure 2.12

a) Do Action After Duration	Enable the automation for this level. Once the duration end, the flow will execute to the next level
b) Email all PIC When this action is active	All involved PIC will receive notification email while this level of action is active
c) Label	The label for action button
d) Go to	Set the destination level while action button execute
e) Trigger flow None	No flow will be trigger while action button execute
f) Trigger flow Trigger new flow	While action button execute, a new flow will be trigger

For example: A staff from HR department send out a purchase request to department manager. The company have the policy which the purchase request cost shall not exceed RM5000. If so, the request needed General Manager approval in order to proceed.

Workflow admin can assign 2 button for this level of action. The 2 buttons are:

- Cost > 5000 This means the cost for the purchase request is exceed 5000. If the cost exceed 500, which level shall the PIC move to?
- Cost < 5000 This means the cost is less than 5000. If the cost less than 500, where should the PIC proceed to?

Therefore, the workflow admin have to assign action button properly in order to allow the Person in charge can easily handle the purchase process. At this stage, workflow admin need to consider the below:

I) Can all PIC understand the label of the button?
II) Do the action button execute to the right level?
III) Is the flow logic?
IV) Which level should go while an action button execute?
V) When the flow shall end/stop?

Once workflow admin complete assigning action button for any level, hit **Update** to save the settings. If you have 10 levels of action for this particular flow, you have to repeat the steps above (figure 2.10 2.12) to assign action button for each level.

Add New Action

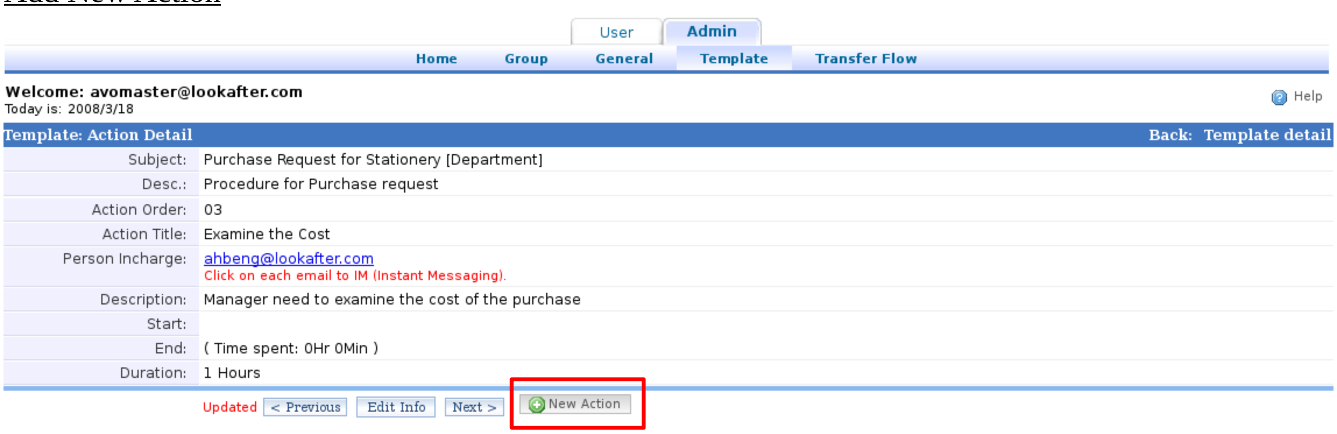


Figure 2.13

On figure 2.13, the highlighted icon allow you to insert new action to this flow template (This option can be found on template edit page). Once you click on it, a page as below will display (figure 2.14):

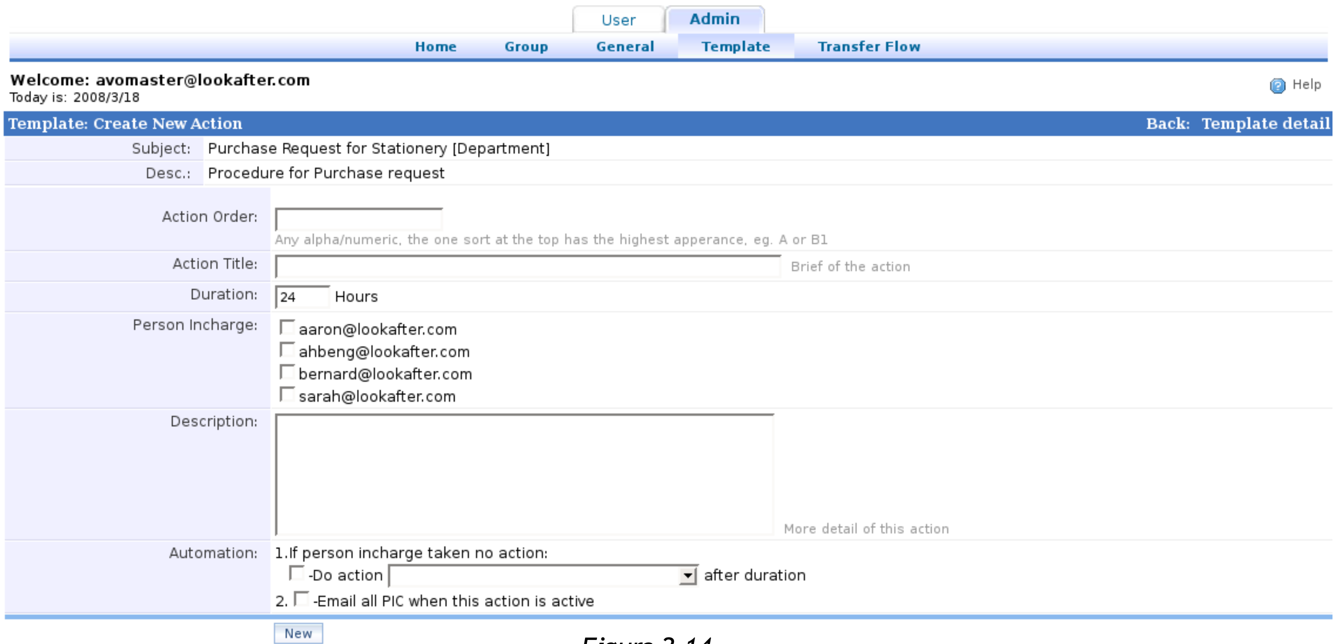


Figure 2.14

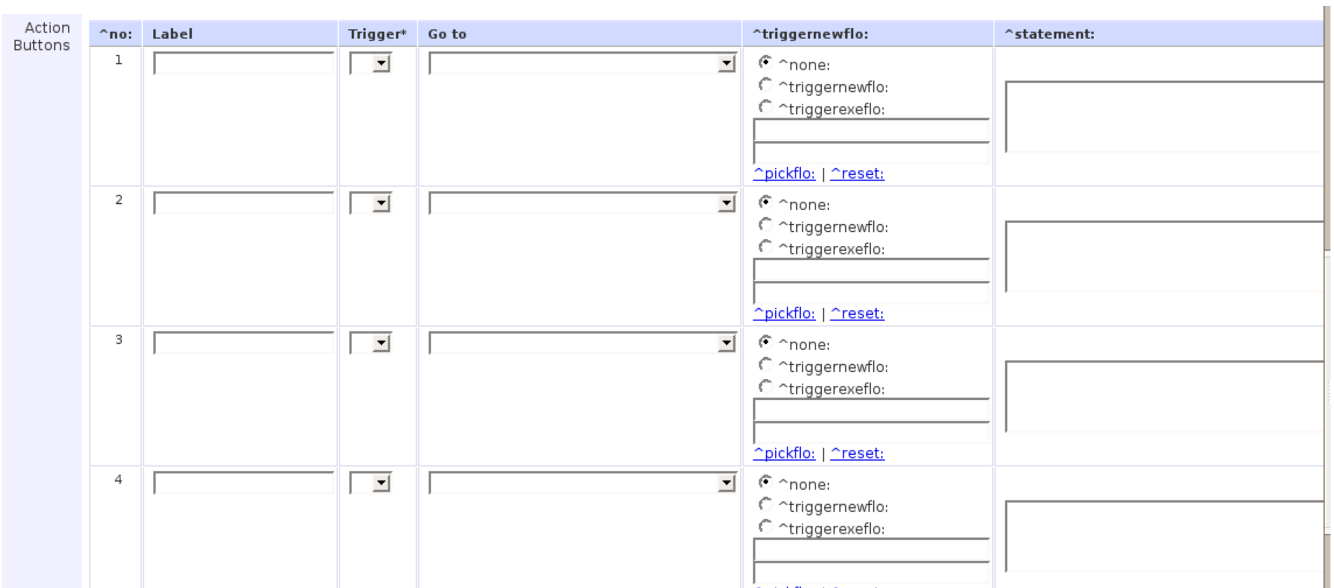


Figure 2.15

For figure 2.14 and 2.15, you may refer back to figure 2.11 and 2.12 as reference.

Note: On figure 2.14, please assign the order for this level of action carefully. If the order incorrect, the flow might not working properly.

Chapter 3: User Page

In this chapter, you will learn: (i) **Create and add a flow by using existing template**, (ii) **Start and End a flow** and (iii) **Check the list of pending flow**. All user of Workflow (and given access rights) allowed to **Add/Create** flow, **Execute** and **End** a flow.

3(i) To Create and Add a New Flow

Go to Virtual Office > BizApp > Work-flow > User > New Flow > 

	Subject	Description
1.	Amerian Company	Sales Process for American Company
2.	Sales proposal flow	Process for Sales proposal
3.	Web Design - Domain Name	Web Design Template
4.	Phone & email support	The flow for supporting customer on a phone call or sent in email.
5.	Technical Support	Support flow
6.	Order TV from supplier	Order process
7.	Purchase Request for Stationery [Department]	Procedure for Purchase request
8.	Purchase Order	Place an order to supplier/vendor

Figure 3.1

Select an existing template which fit your needs from the list (figure 3.1) or click on Create New Flow to start a new one (create a new flow by a new template). Or, you may create a flow through Webmail or Sales Management Module.

Webmail:

Figure 3.1a

Scroll down to the bottom of the email and you will find a similar link as above. Click **Create Flow** to create a flow.

Sales Management:

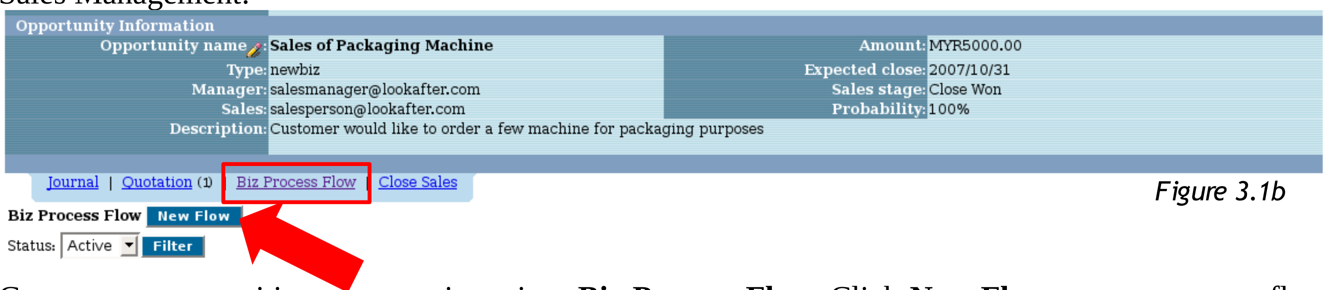


Figure 3.1b

Go to any opportunities page, navigate into **Biz Process Flow**, Click **New Flow** to create a new flow for any business process. Please refer back to Chapter 2 to learn how to create flow template.

Let's go back to the topic, Create New Flow . In this manual, you will learn how to create a new flow in under Workflow Module. Go to **User** Tab, and click on **New Flow**, a list of template will be listed as per figure 3.1. Click the **Create New Flow** icon to proceed, or you may select the existing template which suit your needs to proceed. Let's use **Purchase Request of Stationery** as the example for this manual.

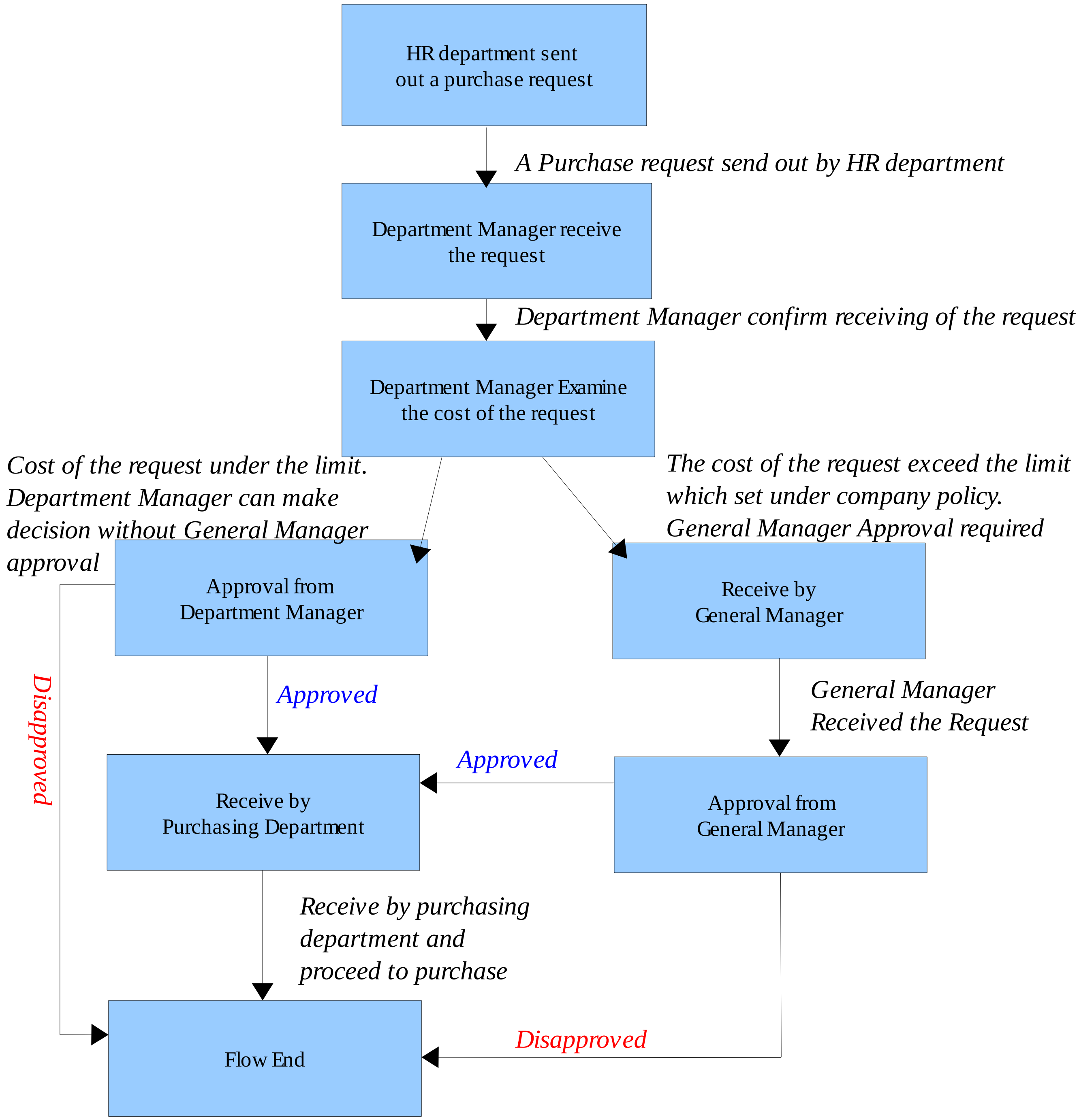
Here is the scenario:

1) Bernard from HR department send a purchase request to Administration Department for requesting purchase of stationery.
2) Ahbeng is the Manager of HR department.
3) Sarah is the Manager of Administration. She is the person who give approval for all purchase request.
4) Aaron is the staff of purchase department.

From HR Department, a staff send a request for purchasing stationery. The request will send to the department manager first. Department manager will first examine the cost of the request. If the cost does not exceed the limit, then the Department manager will approved the request and forward to purchasing department. A notification will be return to requester.

If the cost exceed the limit which set by the company management, then the department manager need to forward the request to General Manager for the approval. If the the request approve, then it will forward to purchasing department. A notification will return to requester.

The flow chart below will describe the flow better:



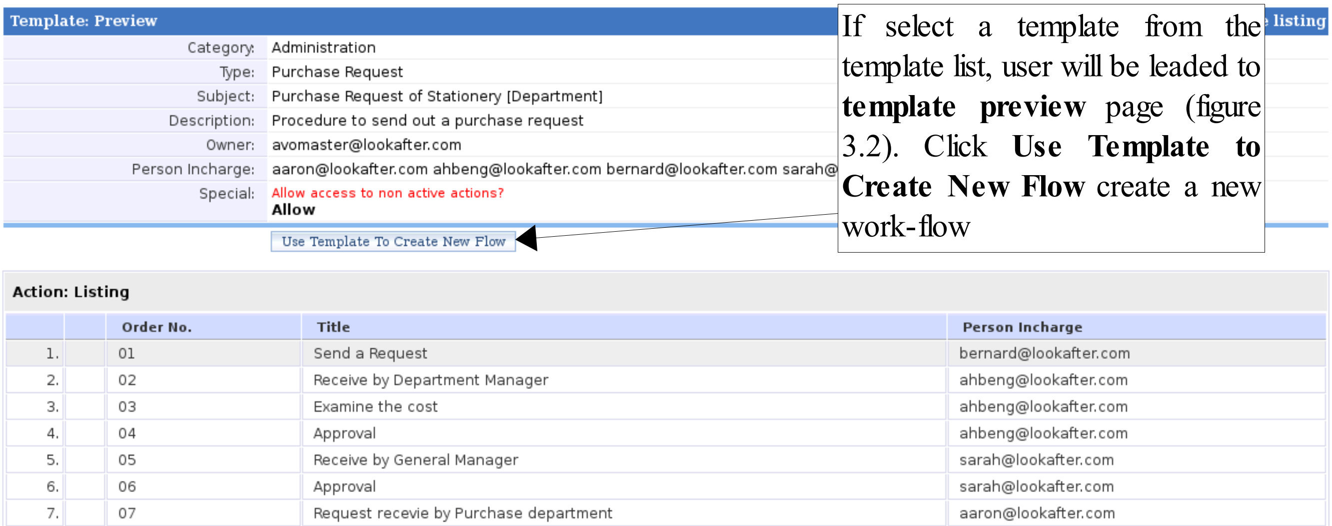


Figure 3.2

There are **three** major steps involved. Please follow the instructions below:

Step 1: Flow Details

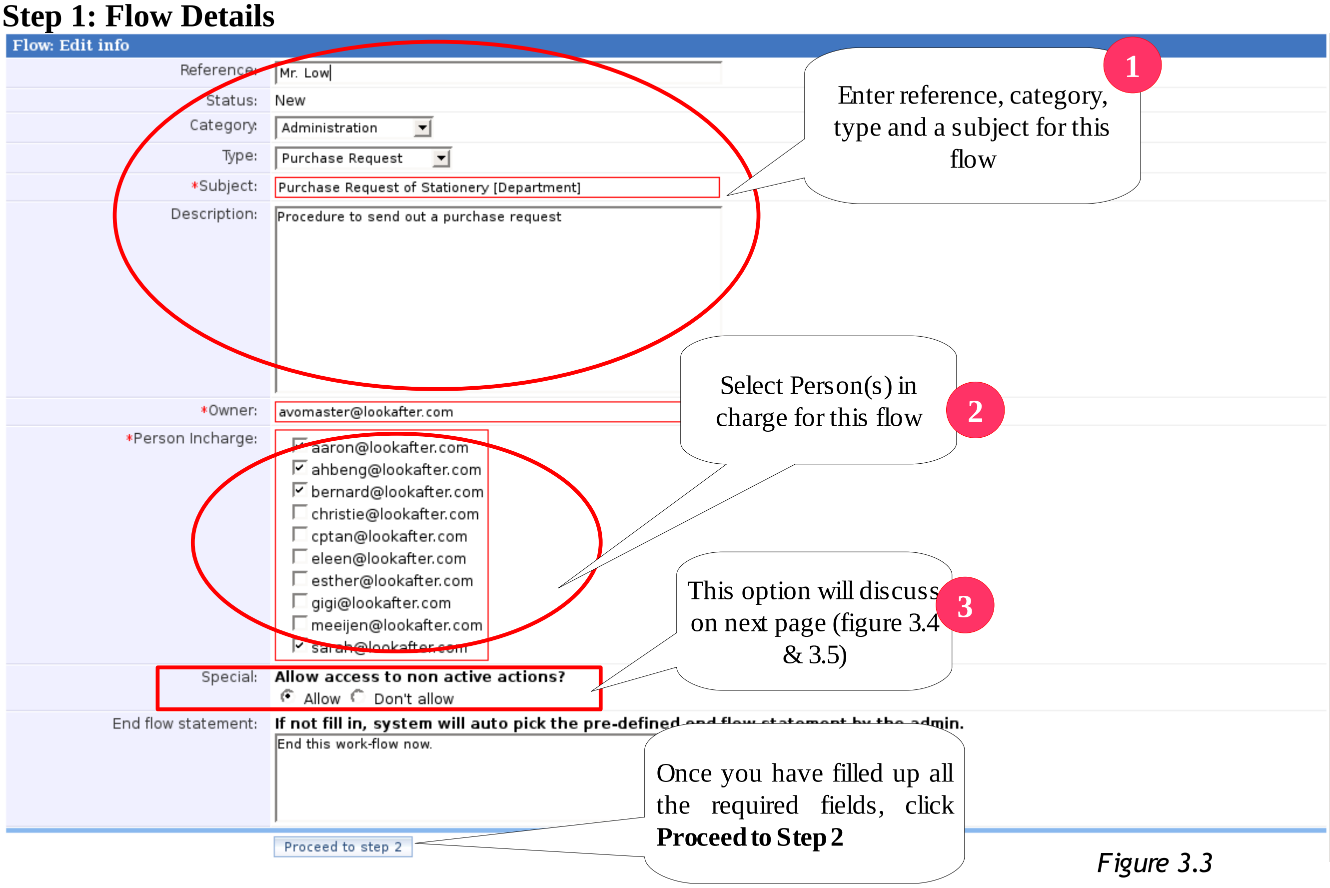


Figure 3.3

Tips

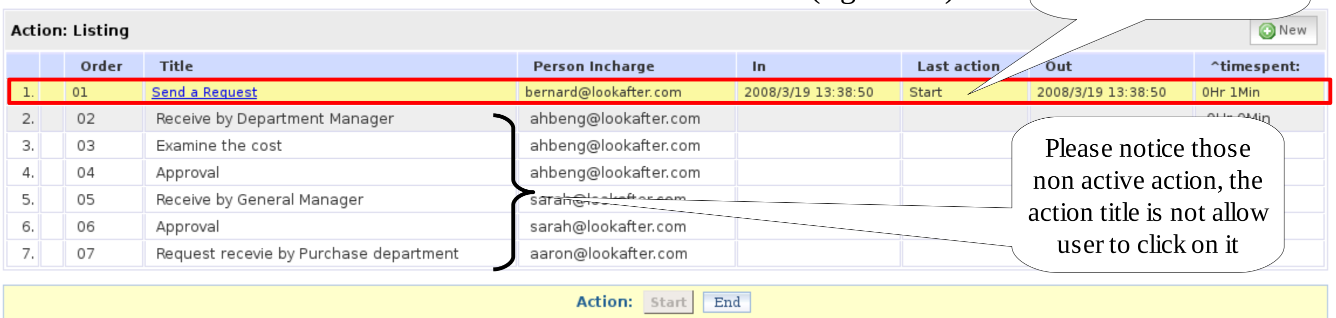
Allow access to non active actions?

This is an option which allow the in charge person to check back those non active action(s) during the flow is being executed.

Why allow?

The person in charge can double check the coming/past action(s) whether has been setup correctly or not. Correction can be made anytime (if needed).

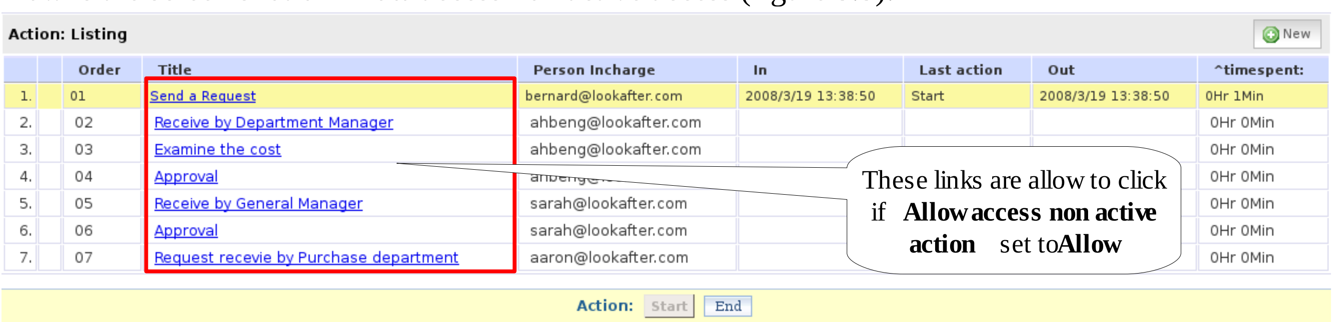
Below is the screen shot of **Not allow** access non active action (figure 3.4):



	Order	Title	Person Incharge	In	Last action	Out	^timespent:
1.	01	Send a Request	bernard@lookafter.com	2008/3/19 13:38:50	Start	2008/3/19 13:38:50	0Hr 1Min
2.	02	Receive by Department Manager	ahbeng@lookafter.com				0Hr 0Min
3.	03	Examine the cost	ahbeng@lookafter.com				
4.	04	Approval	ahbeng@lookafter.com				
5.	05	Receive by General Manager	sarah@lookafter.com				
6.	06	Approval	sarah@lookafter.com				
7.	07	Request recevie by Purchase department	aaron@lookafter.com				

Figure 3.4

Now is the screen shot of **Allow** access non active access (figure 3.5):

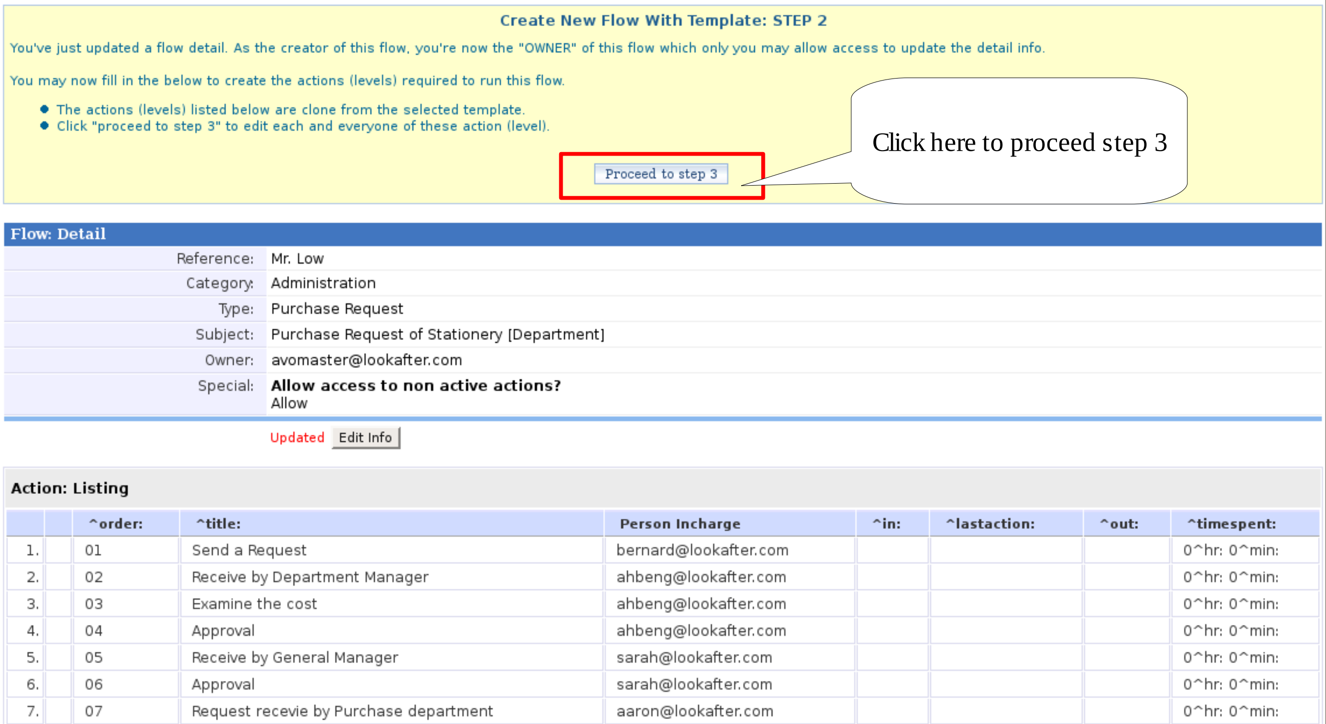


	Order	Title	Person Incharge	In	Last action	Out	^timespent:
1.	01	Send a Request	bernard@lookafter.com	2008/3/19 13:38:50	Start	2008/3/19 13:38:50	0Hr 1Min
2.	02	Receive by Department Manager	ahbeng@lookafter.com				0Hr 0Min
3.	03	Examine the cost	ahbeng@lookafter.com				0Hr 0Min
4.	04	Approval	ahbeng@lookafter.com				0Hr 0Min
5.	05	Receive by General Manager	sarah@lookafter.com				0Hr 0Min
6.	06	Approval	sarah@lookafter.com				0Hr 0Min
7.	07	Request recevie by Purchase department	aaron@lookafter.com				0Hr 0Min

Figure 3.5

If this option set to **Allow**, the title of the action has turn into blue color and it has become an active link. Therefore, user can edit the action details anytime (if needed).

Step 2:



Create New Flow With Template: STEP 2

You've just updated a flow detail. As the creator of this flow, you're now the "OWNER" of this flow which only you may allow access to update the detail info.

You may now fill in the below to create the actions (levels) required to run this flow.

- The actions (levels) listed below are clone from the selected template.
- Click "proceed to step 3" to edit each and everyone of these action (level).

Proceed to step 3

Flow: Detail

Reference:	Mr. Low
Category:	Administration
Type:	Purchase Request
Subject:	Purchase Request of Stationery [Department]
Owner:	avomaster@lookafter.com
Special:	**Allow access to non active actions?** Allow

Updated Edit Info

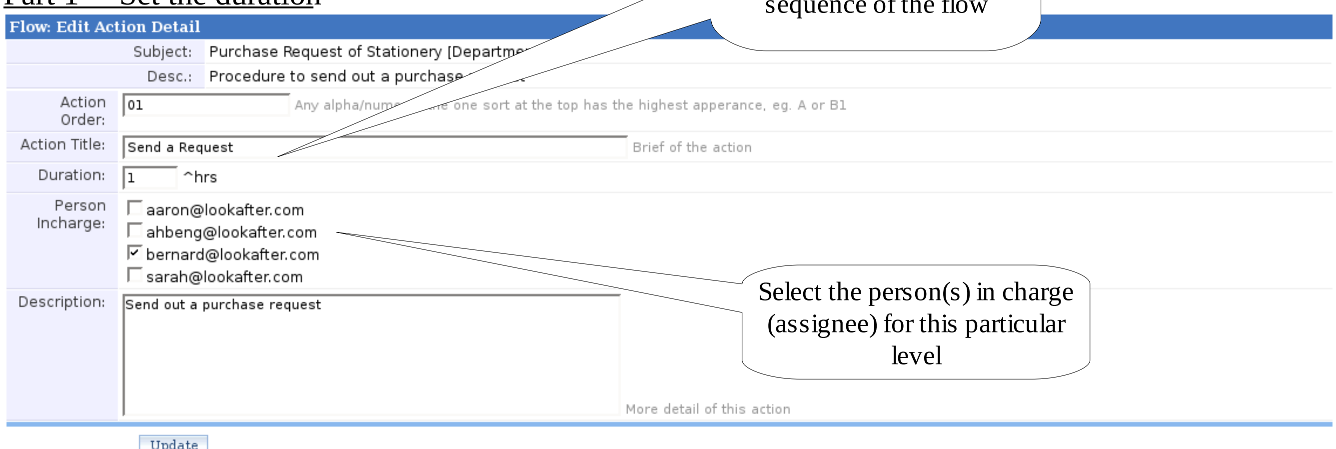
Action: Listing

	^order:	^title:	Person Incharge	^in:	^lastaction:	^out:	^timespent:
1.	01	Send a Request	bernard@lookafter.com				0^hr: 0^min:
2.	02	Receive by Department Manager	ahbeng@lookafter.com				0^hr: 0^min:
3.	03	Examine the cost	ahbeng@lookafter.com				0^hr: 0^min:
4.	04	Approval	ahbeng@lookafter.com				0^hr: 0^min:
5.	05	Receive by General Manager	sarah@lookafter.com				0^hr: 0^min:
6.	06	Approval	sarah@lookafter.com				0^hr: 0^min:
7.	07	Request recevie by Purchase department	aaron@lookafter.com				0^hr: 0^min:

Step 3: Action setup and action button assigning

You have **two part** to complete in step 3

Part 1 Set the duration



Flow: Edit Action Detail

Subject:	Purchase Request of Stationery [Departme…
Desc.:	Procedure to send out a purchase …
Action Order:	01 Any alpha/num… one sort at the top has the highest apperance, eg. A or B1
Action Title:	Send a Request Brief of the action
Duration:	1 ^hrs
Person Incharge:	aaron@lookafter.com ahbeng@lookafter.com ☑ bernard@lookafter.com sarah@lookafter.com
Description:	Send out a purchase request More detail of this action

Update

Figure 3.7

Part 2 Assign Action Button to this Action

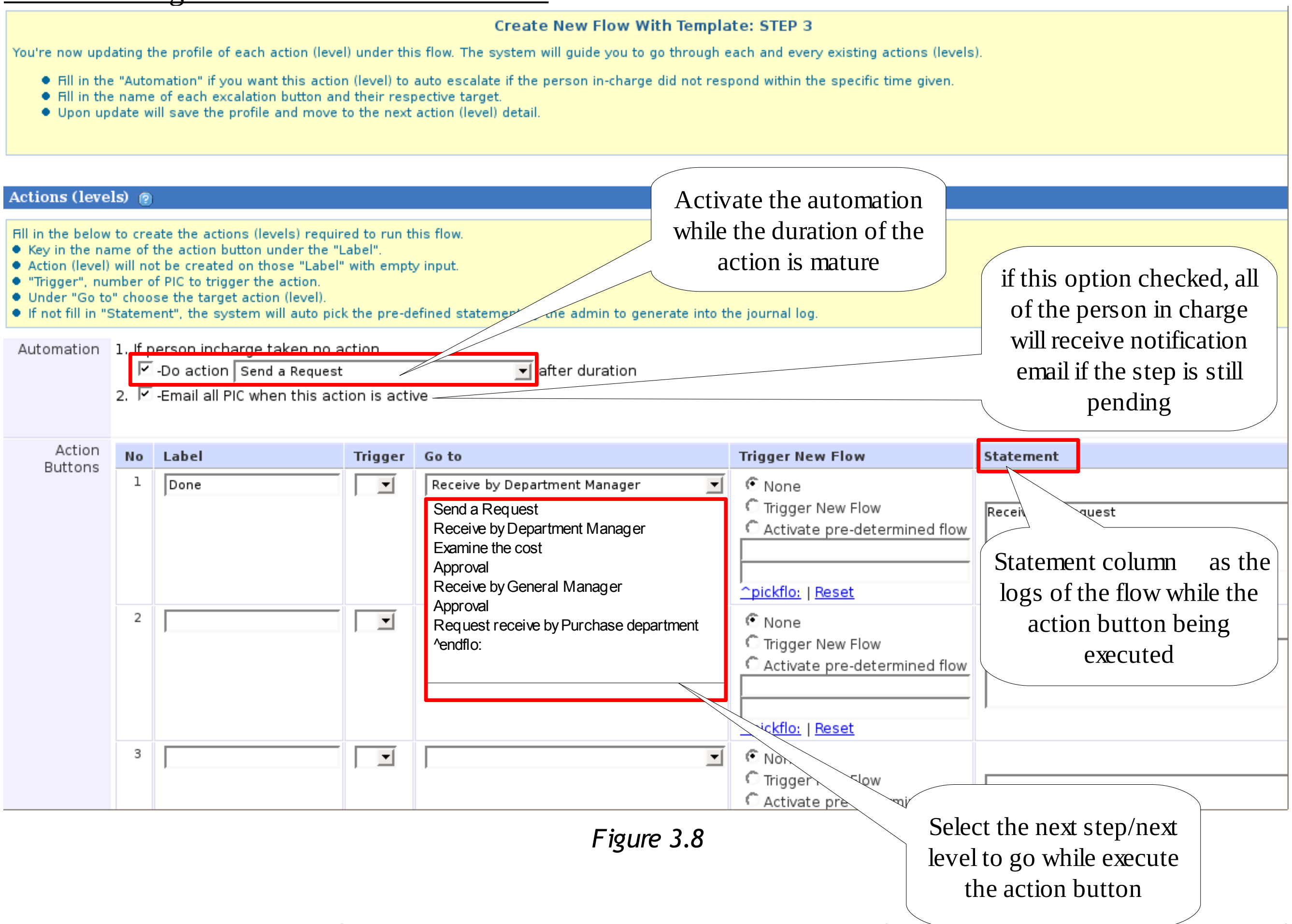


Figure 3.8

Once the part 1 and part 2 for Step 3 completed, click **Update** button (figure 3.7) to save the settings. If you have 10 level of actions under one flow, please repeat Step 3 for each level.

Tips

Workflow Additional Feature Walk through - ^endflow: and ^endflonewflo:

End Flow:

^endflo: is a feature for end or terminate the flow. For example, when a request rejected by department manager, the flow shall stop at this stage and no further step to proceed. Therefore, an **^endflo:** action button can be created in advance to avoid the progress flow being stuck. (Learn to create action button on figure 3.8) This allow user terminate the flow on any level.

Create Flow Back-to-Back - ^endflonewflo:

^endflonewflo: This is a feature to allow user to start a new flow immediately when a running flow ended. For example:

The template we use in this manual is for purchase request purpose only. Therefore, no purchasing steps was included. In this case, the owner of the flow can enable this option for the purchasing department to continue with a new flow once the current one ended.

This feature appear only after the flow has been created. You may open the Flow detail for checking this feature status.

Below are the steps to turn on **^endflonewflow:** feature (figure 3.9 3.14).

Step 1: 1

Go to Flow detail page for checking the status of this **^endflonewflow:** feature

Step 2:

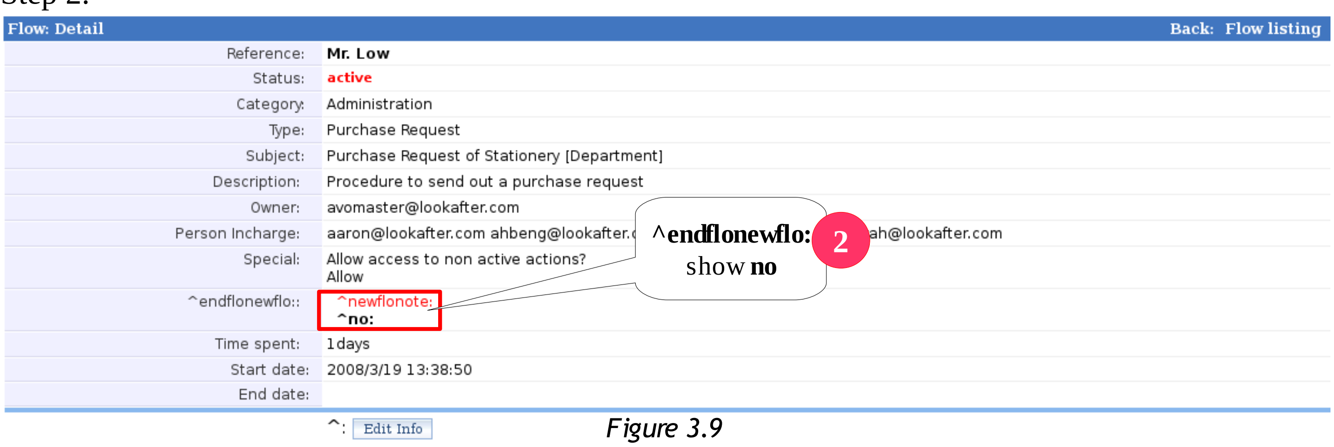


Figure 3.9

Make sure the status of **endflonewflo: ,** if the status shows **no** (figure 3.9), click on **Edit Info** button

Step 3:

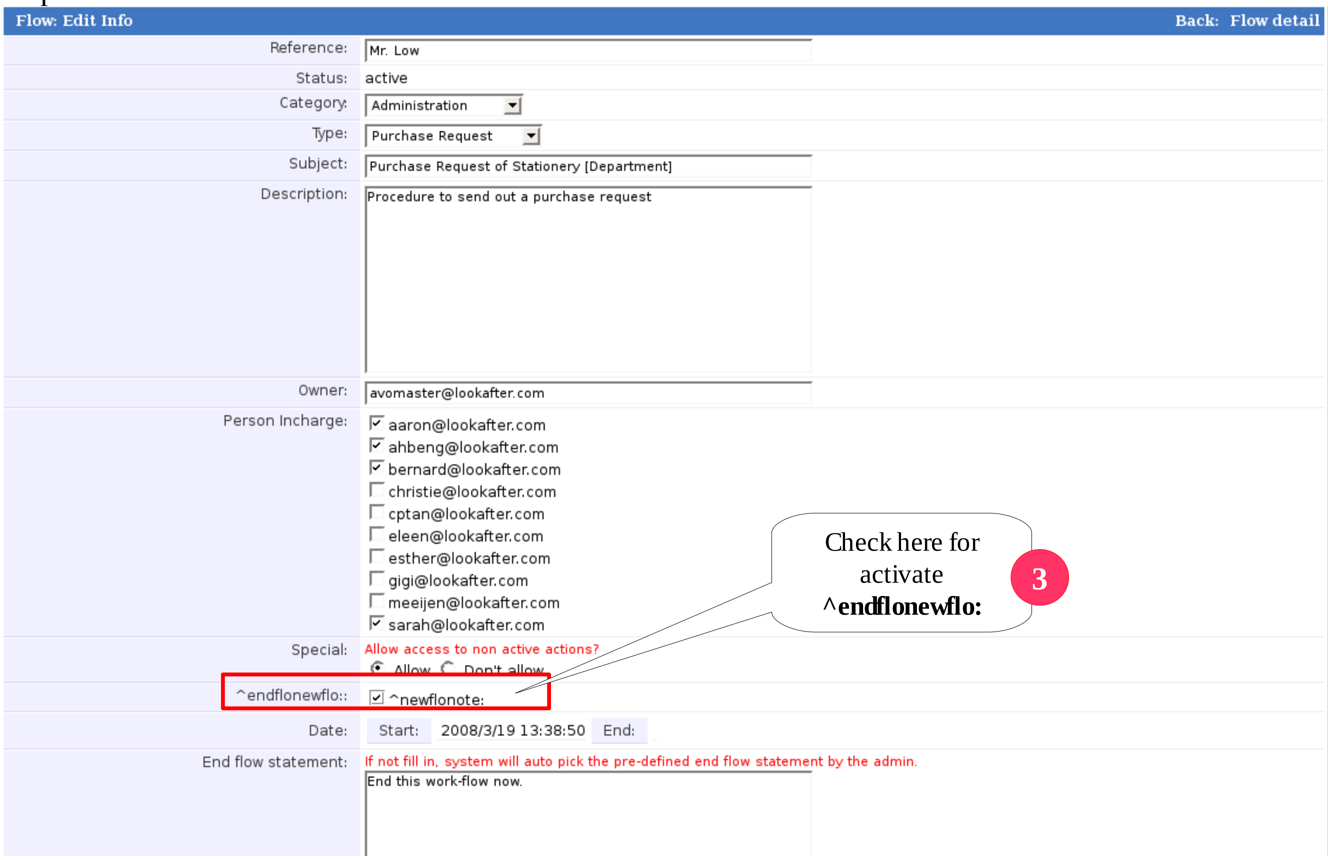


Figure 3.10

Now you are on the flow information edit page (figure 3.10). Place a tick on the check box for option **^endflonewflo:** Hit **Update** button to save the setting.

Step 4:

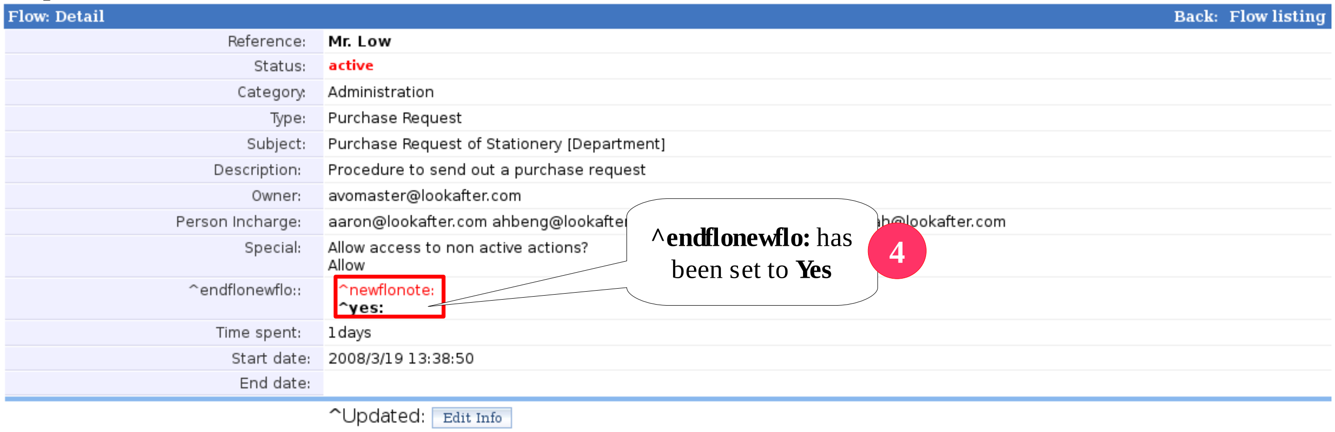


Figure 3.11

When **^endflonewflo:** is turned on (figure 3.11), you may execute your flow now.

Step 5:

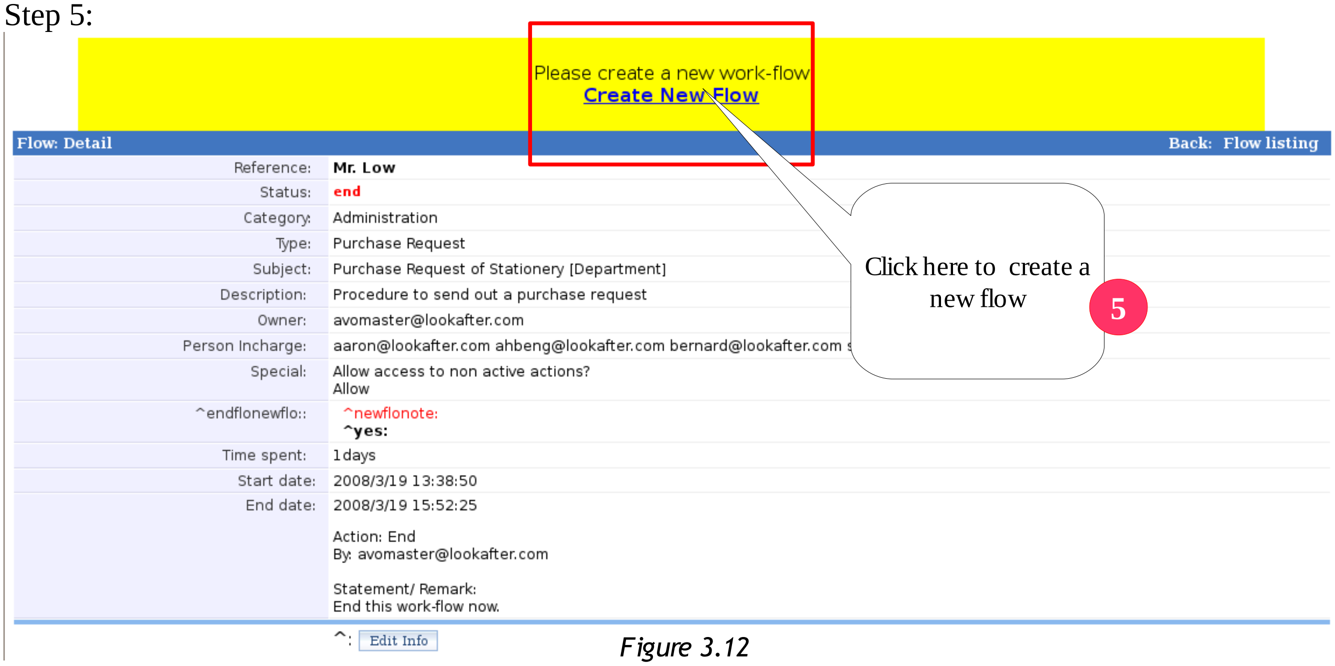


Figure 3.12

While flow ends, you will be able to see a banner on the top of the page (figure 3.12). Click on the link to create a new flow for continuing the process.

Step 6:

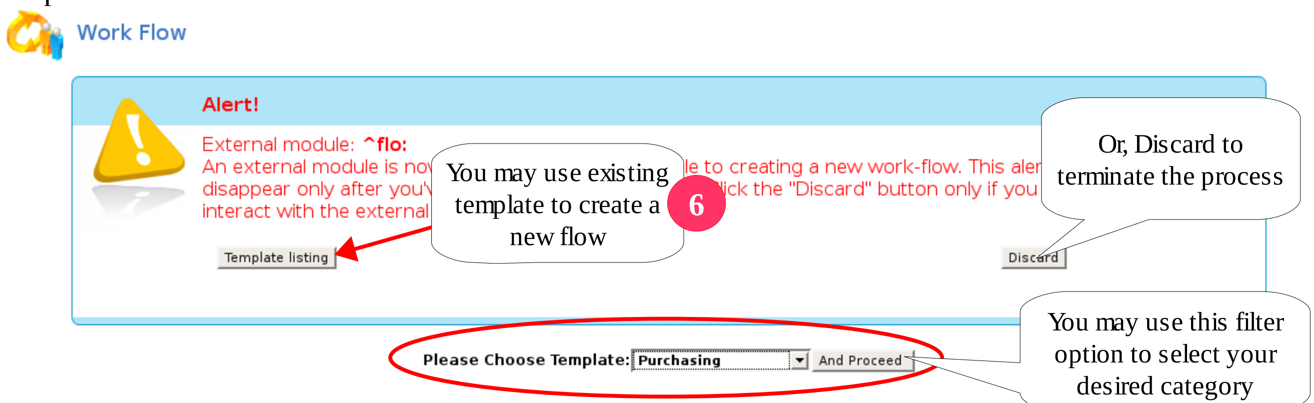


Figure 3.13

On this page (figure 3.13), please read the Alert banner carefully and follow the instructions. You may use the existing template to create a continuous flow or Discard to terminate the process.

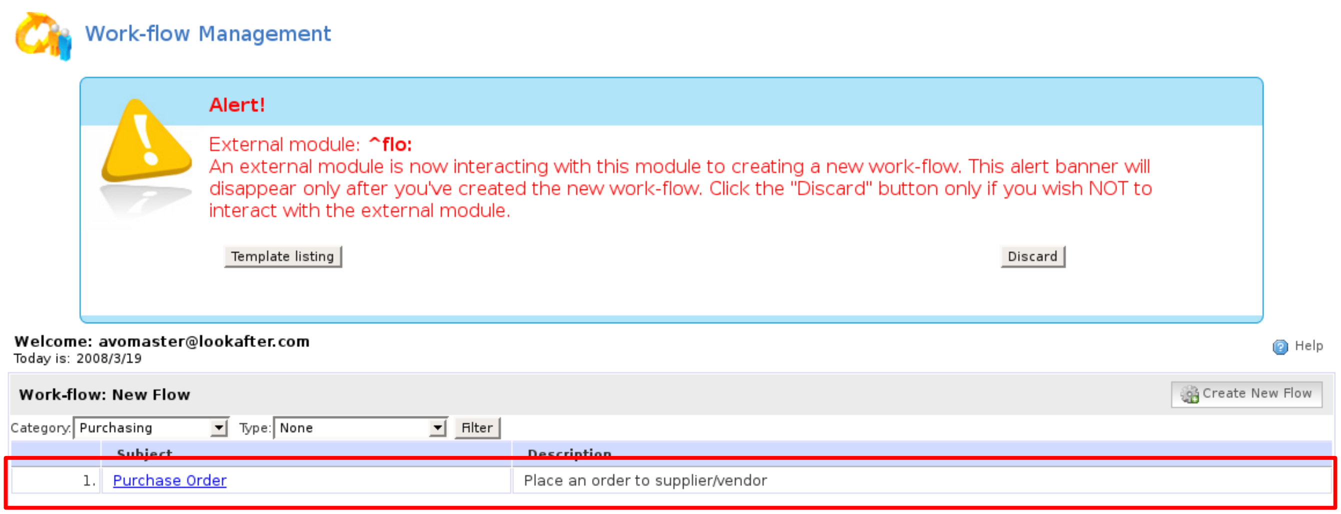


Figure 3.14

After selected a category, the system will listed out the relevant template for the user. User may create a new flow now.

3(ii): Start and End a Flow

Start a Flow

Go to: Virtual Office > BizApp > Work-flow > User > My flow

A list of flow will be displayed. Select the assigned flow, click on the flow title and you will see the screen as below (figure 3.15). If the flow is not created yet, please refer to **3(i)** (figure 3.1 3.8), learn to create a flow.

We are going to use the example to demonstrate the feature of Workflow.

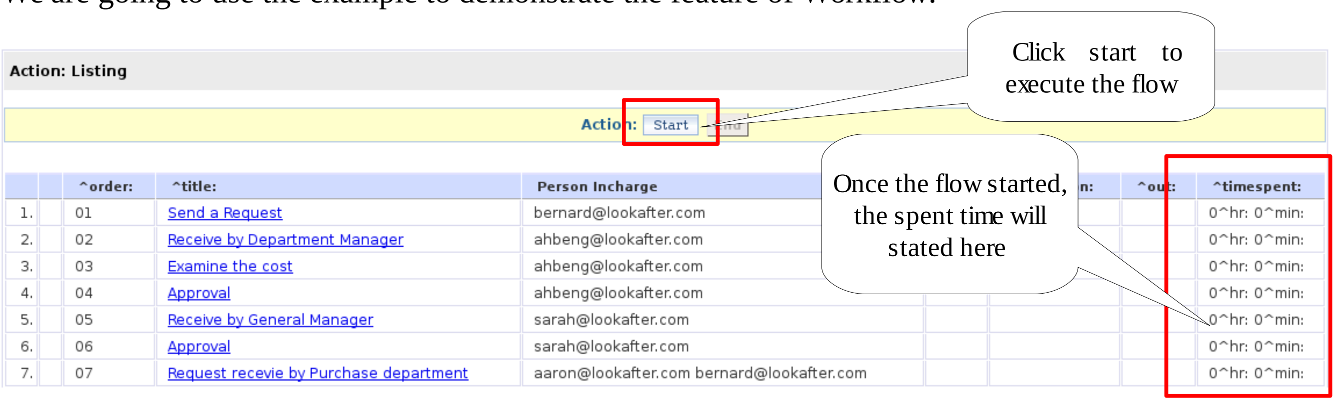


Figure 3.15

(I) Send a Request

When a staff from HR department send a purchase request to Department manager for purchasing stationery for office use. Therefore the Staff need to follow the standard operating procedure (SOP) for the request. He/She have to create a flow, and execute it.

While the flow started, HR department staff have to navigate into the level which he/she in charge, to execute the flow into the next level in order to allow the person in charge (PIC) of the next level will receive a notification and proceed to further process.

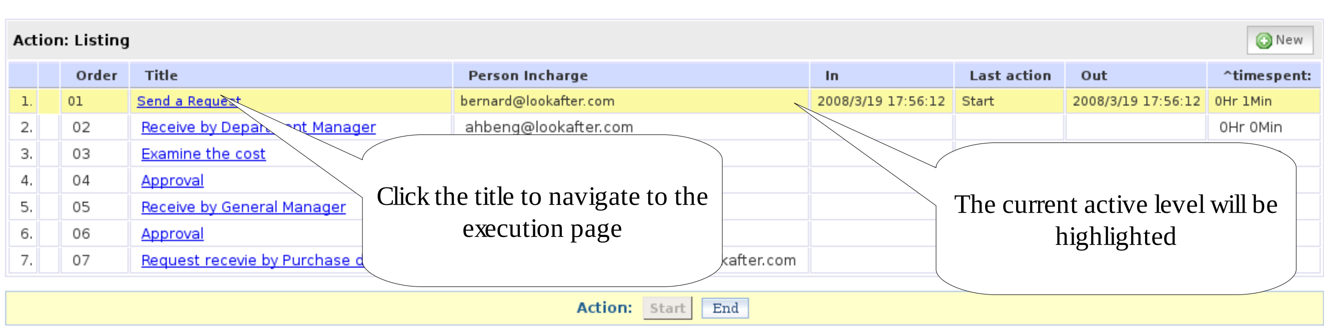


Figure 3.16

As per figure 3.16, the highlighted part (yellow color) is the active action. User may click on the action's subject, to navigate into the action detail page for executing the action button to enter new level. In level 'Send a Request', a similar screen as below(figure 3.17) will be show.

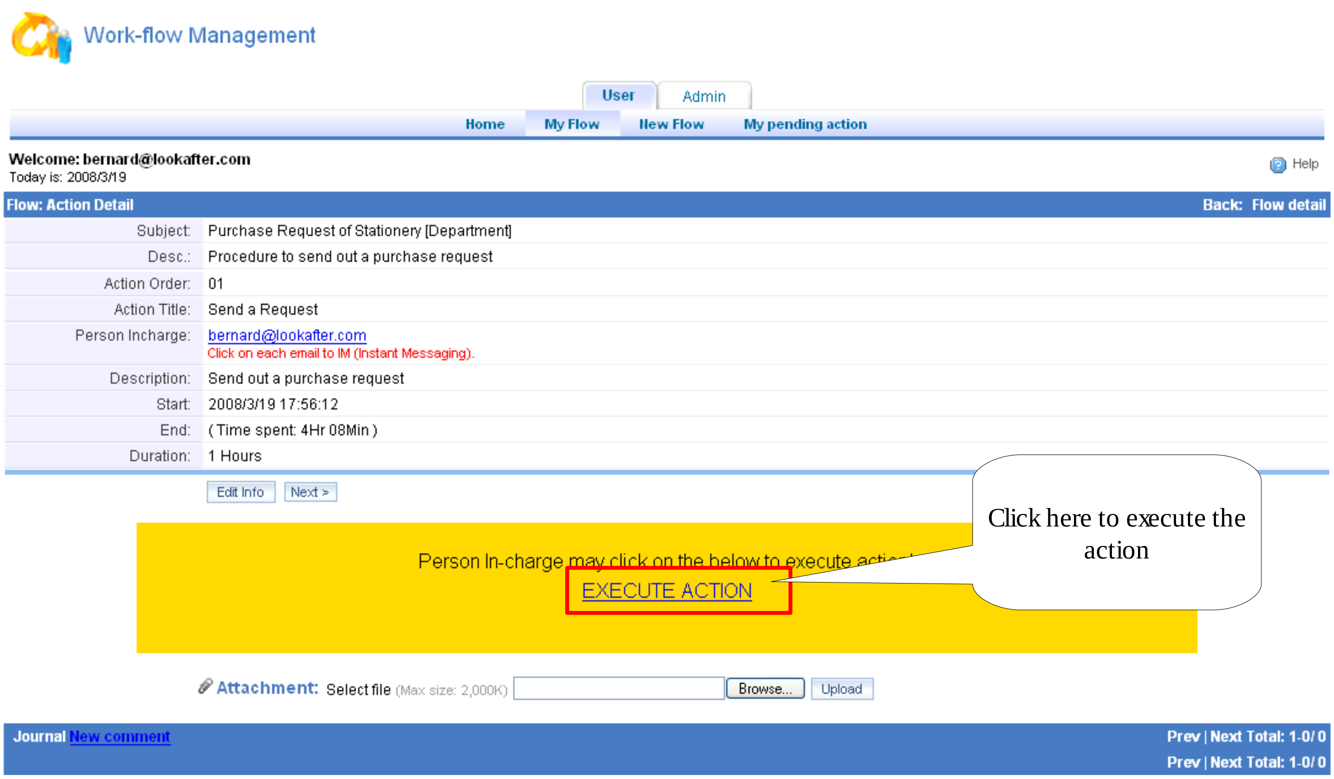


Figure 3.17

When user click on **EXECUTE ACTION**, a light box as below will pop up to prompt user enter action's comments (figure 3.18).

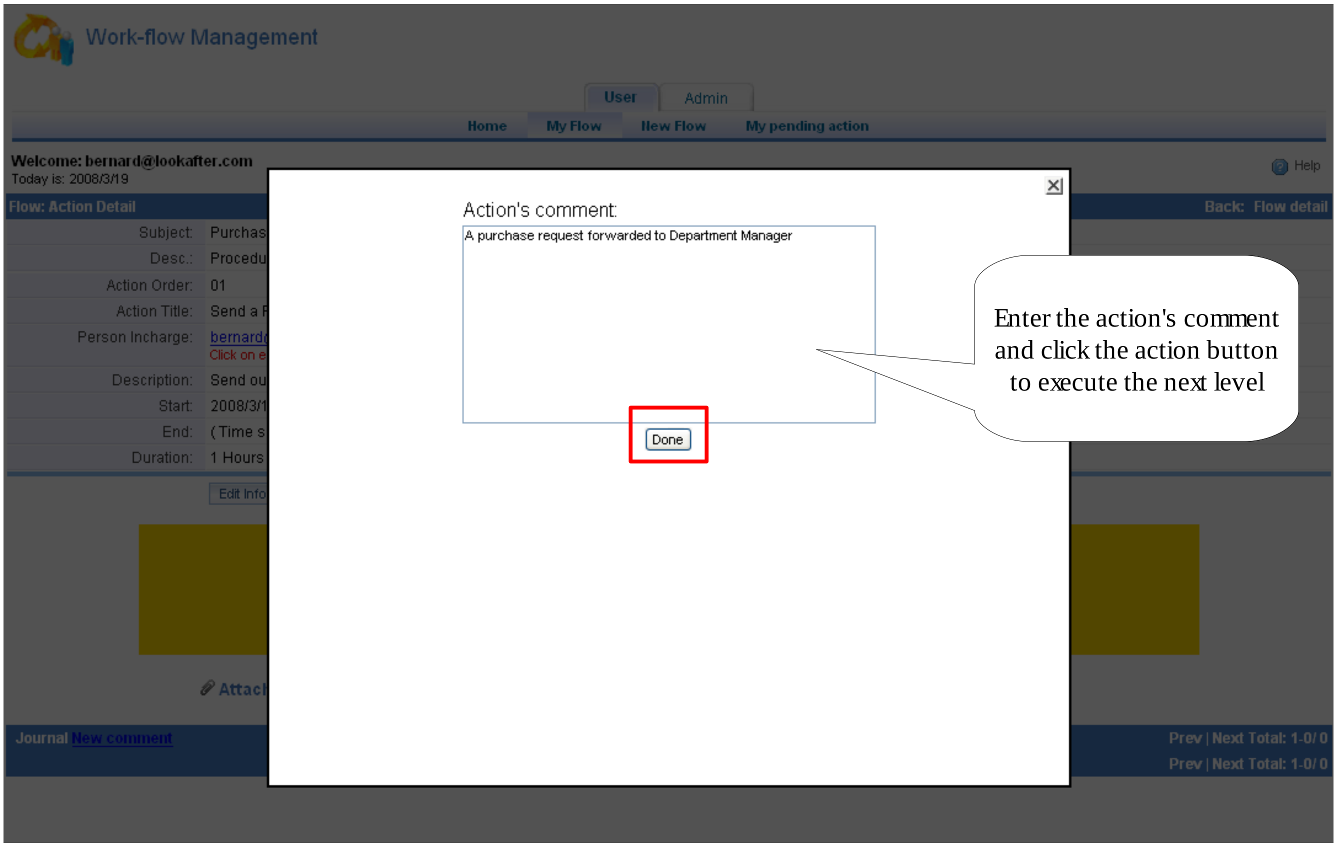


Figure 3.18

Without the action's comment, PIC will not allow to proceed to next level. An error message will display as below:

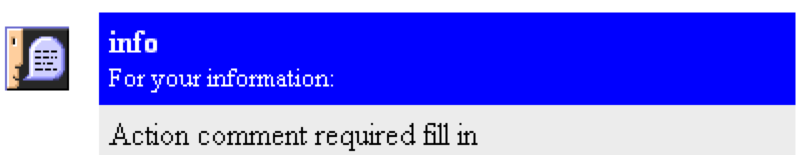


Figure 3.19

Click Back button on the browser to back to the action page.

When the level executed, the page will go back to Flow listing page. Right now, PIC should able to found the yellow bar has moved to the active level (as per figure 3.20)

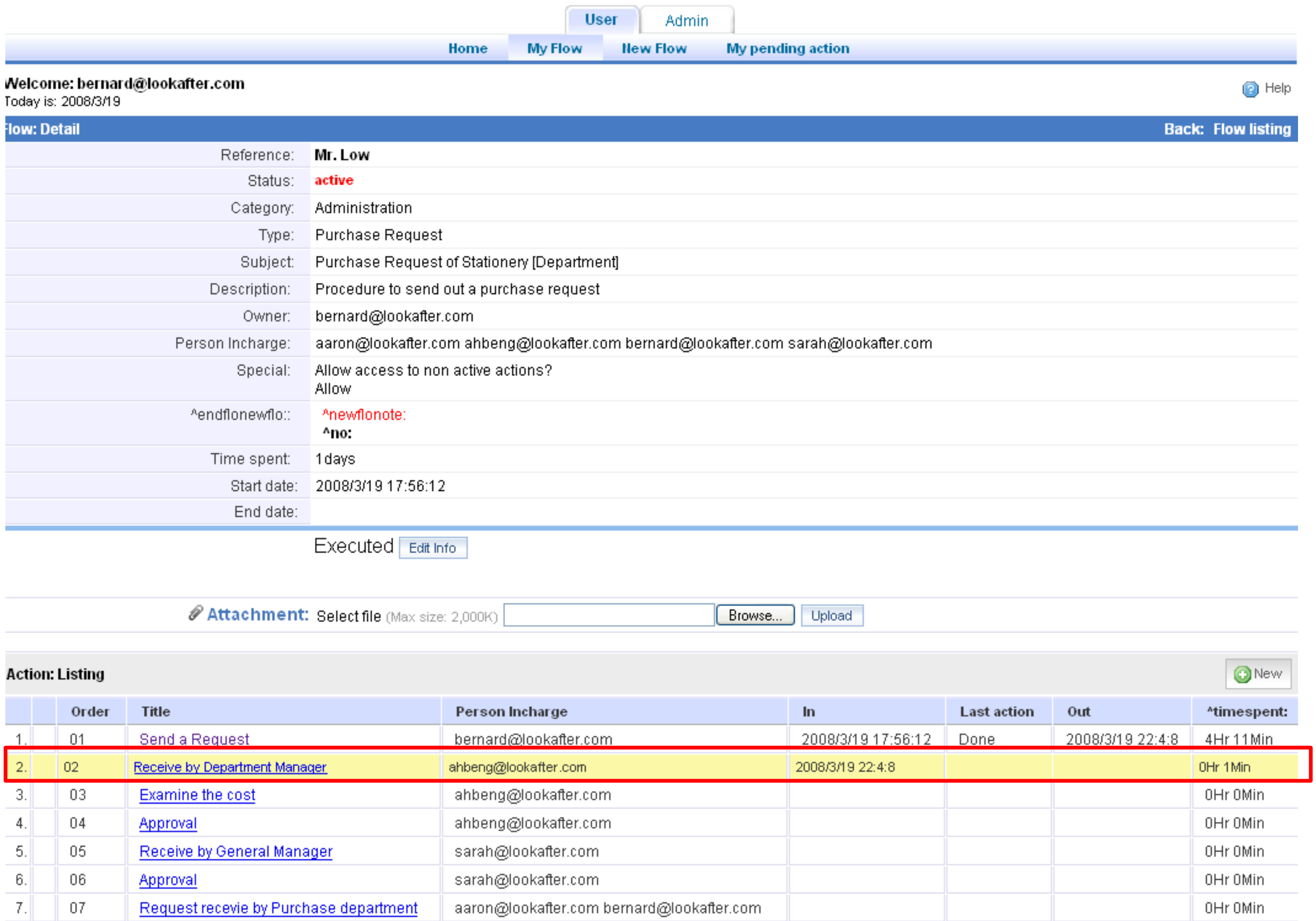


Figure 3.20

If the user was not the PIC of this level, they will not be able to see the execute link and the yellow banner while they navigate into the action detail page.

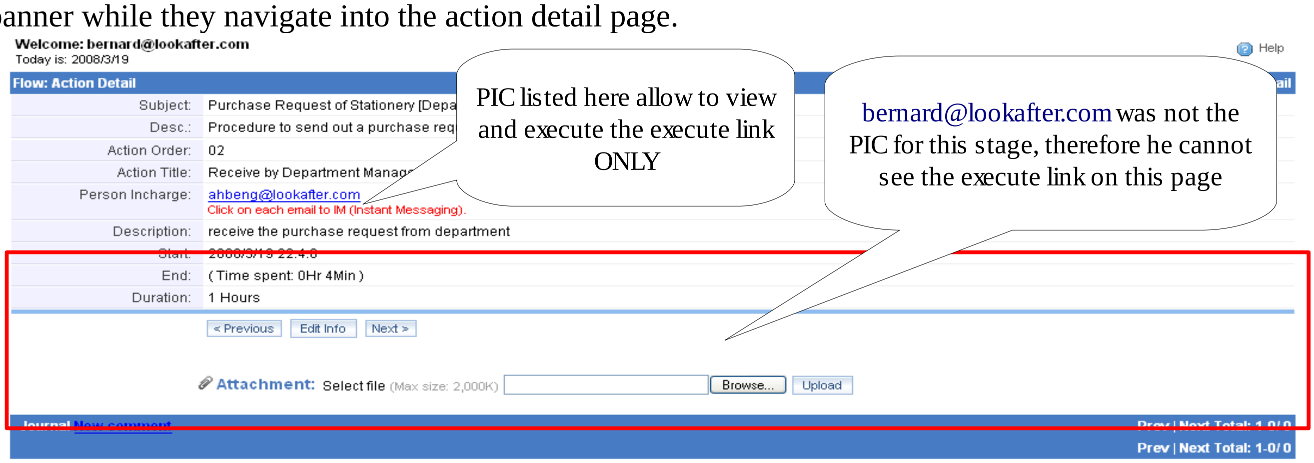


Figure 3.21

Once the Department receive the purchase request, he/she need to respond to the requester. He/she need to execute to the next level to examined the cost of the request.

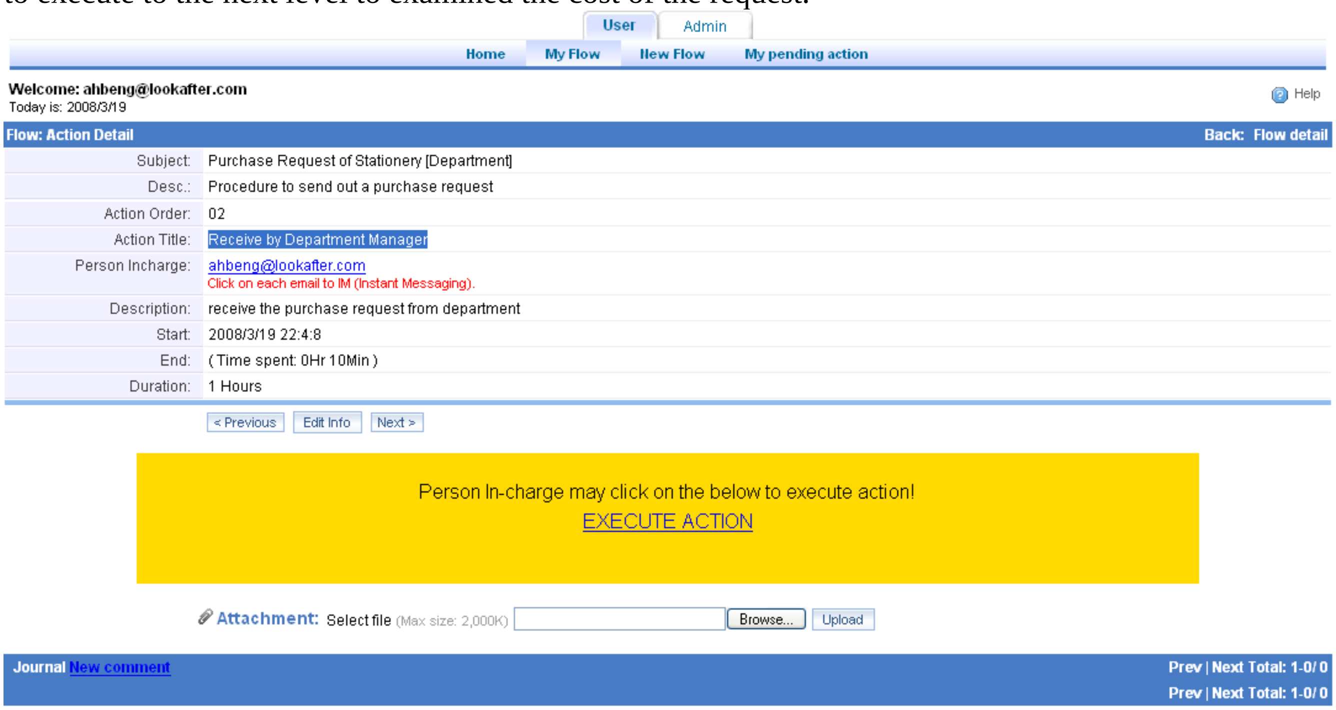


Figure 3.21

The department manager need to click the **Execute Action** link to execute the level to the next. A notification will send to the PIC by email to inform the Department manger have received the request.

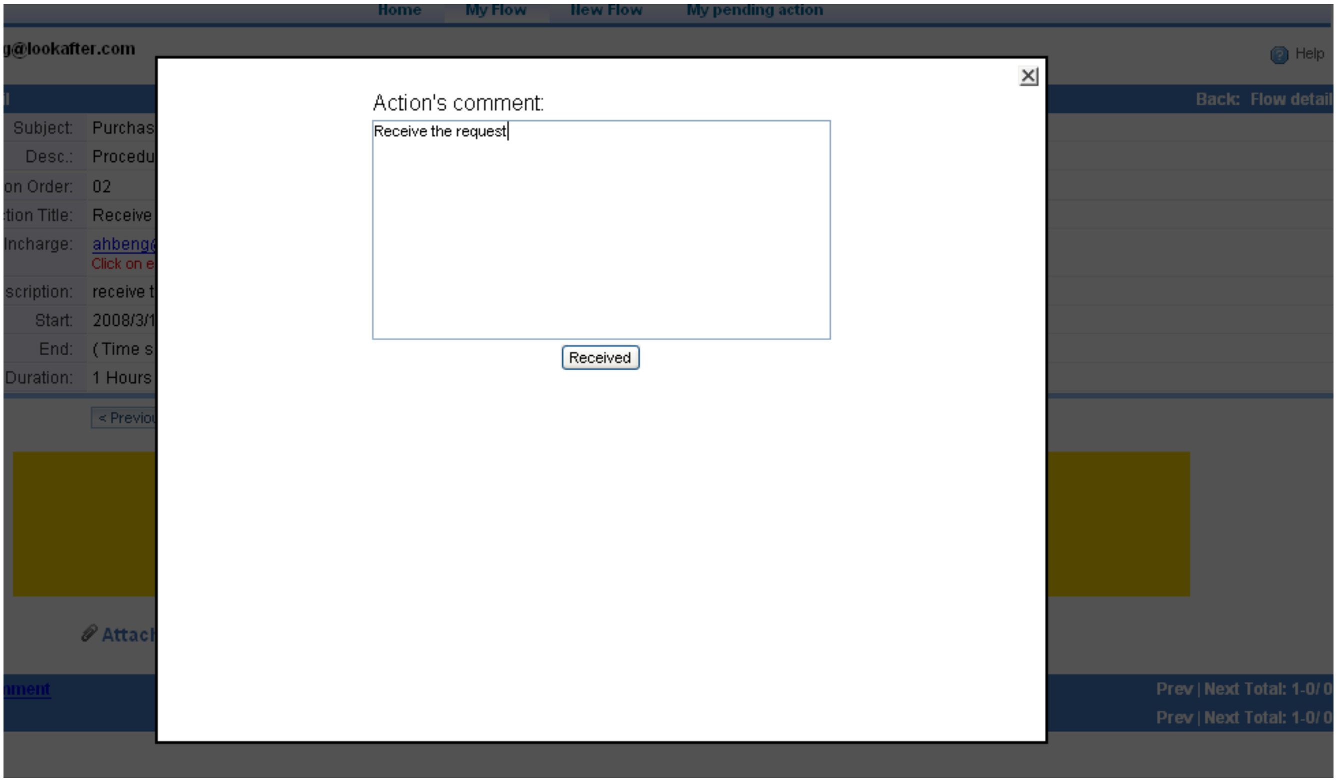


Figure 3.22

Same as previous steps, a light box will pop up to allow PIC enter the action's comment before the action executed. Hit the action button to execute to next level.

Action: Listing New

		Order	Title	Person Incharge	In	Last action	Out	^timespent:
1.		01	Send a Request	bernard@lookafter.com	2008/3/19 17:56:12	Done	2008/3/19 22:4:8	4Hr 11Min
2.		02	Receive by Department Manager	ahbeng@lookafter.com	2008/3/19 22:4:8	Received	2008/3/19 22:38:30	0Hr 34Min
3.		03	Examine the cost	ahbeng@lookafter.com	2008/3/19 22:38:31			0Hr 1Min
4.		04	Approval	ahbeng@lookafter.com				0Hr 0Min
5.		05	Receive by General Manager	sarah@lookafter.com				0Hr 0Min
6.		06	Approval	sarah@lookafter.com				0Hr 0Min
7.		07	Request recevie by Purchase department	aaron@lookafter.com bernard@lookafter.com				0Hr 0Min

Figure 3.23

The user may notice the level already execute to the next (Figure 3.23).

(III) Examine the Cost

At this level, the department manger was set as the PIC. ahbeng@lookafter.com is the PIC. He has to calculate the cost of the request whether exceed the limit or not. In this example, RM5000 is the limit for this company. Let's assume the request cost was less than RM5000. Therefore, this request do not need approval from General Manager of the company. Department managerr can act as the decision maker for this request.

The PIC have to navigate into this level, and the page as below will be display (Figure 3.24)

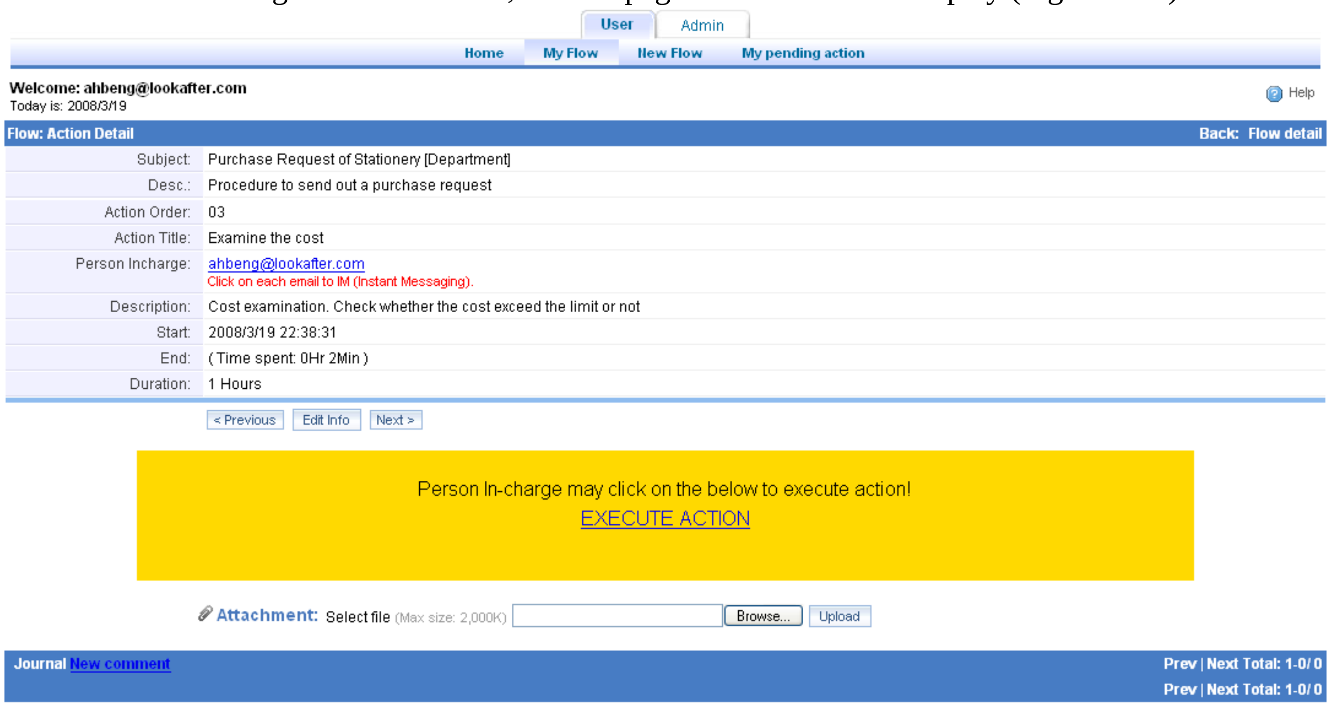


Figure 3.24

Repeat the same steps to execute the action Click on the **Execute Action** link. A light box will pop up again to allow PIC enter the action's comment.

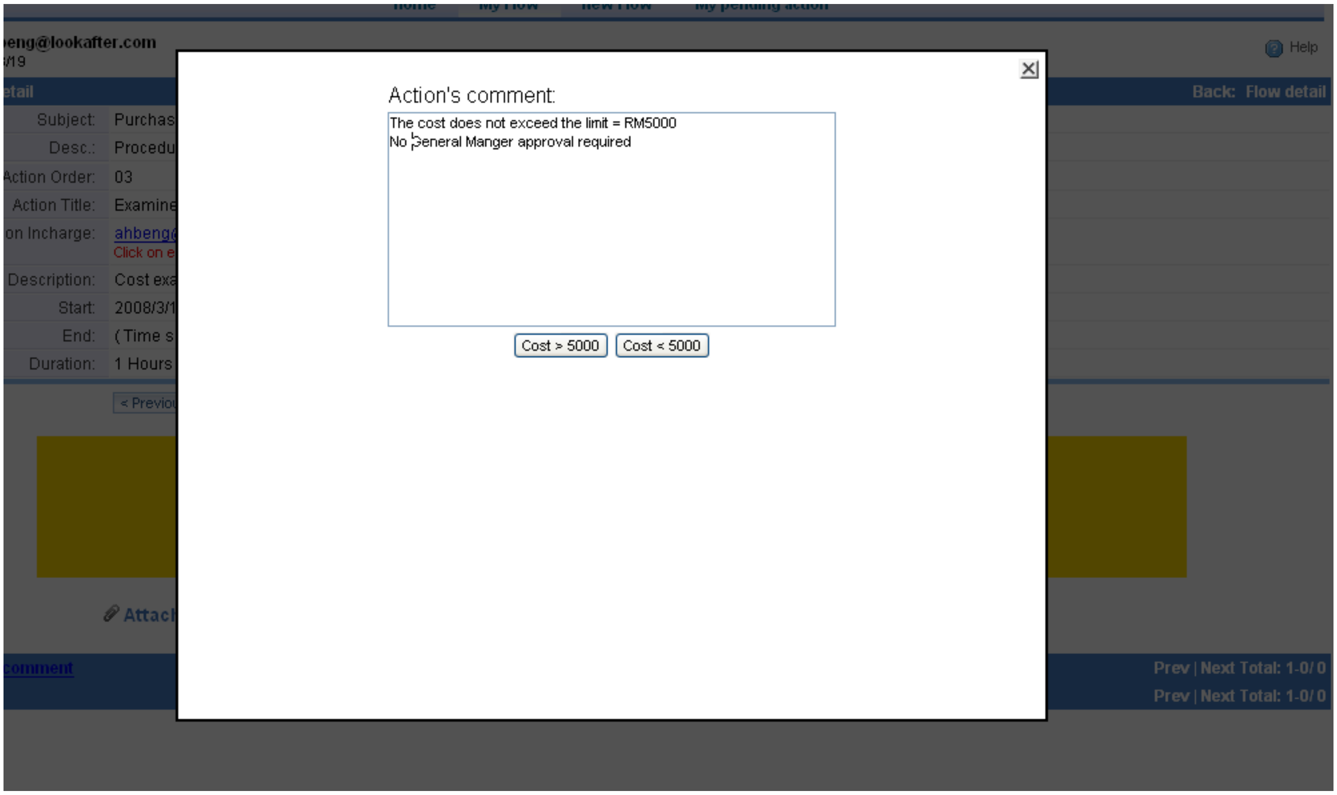


Figure 3.25

Since the cost of the request does not exceed the limit, PIC can execute the action button which determine the cost is less than the limit to proceed.

(IV) Approval

Action: Listing

		Order	Title	Person Incharge	In	Last action	Out	*timespent:
1.		01	Send a Request	bernard@lookafter.com	2008/3/19 17:56:12	Done	2008/3/19 22:4:8	4Hr 11Min
2.		02	Receive by Department Manager	ahbeng@lookafter.com	2008/3/19 22:4:8	Received	2008/3/19 22:38:30	0Hr 34Min
3.		03	Examine the cost	ahbeng@lookafter.com	2008/3/19 22:38:31	Cost < 5000	2008/3/19 22:42:49	0Hr 4Min
4.		04	Approval	ahbeng@lookafter.com	2008/3/19 22:42:49			0Hr 1Min
5.		05	Receive by General Manager	sarah@lookafter.com				0Hr 0Min
6.		06	Approval	sarah@lookafter.com				0Hr 0Min
7.		07	Request recevie by Purchase department	aaron@lookafter.com bernard@lookafter.com				0Hr 0Min

Figure 3.26

According to the company policy, if the cost of the request less than RM5000, department manager can make the decision without the approval from General Manager. Department Manager now have to navigate into the Approval level whether to approve or disapprove this request.

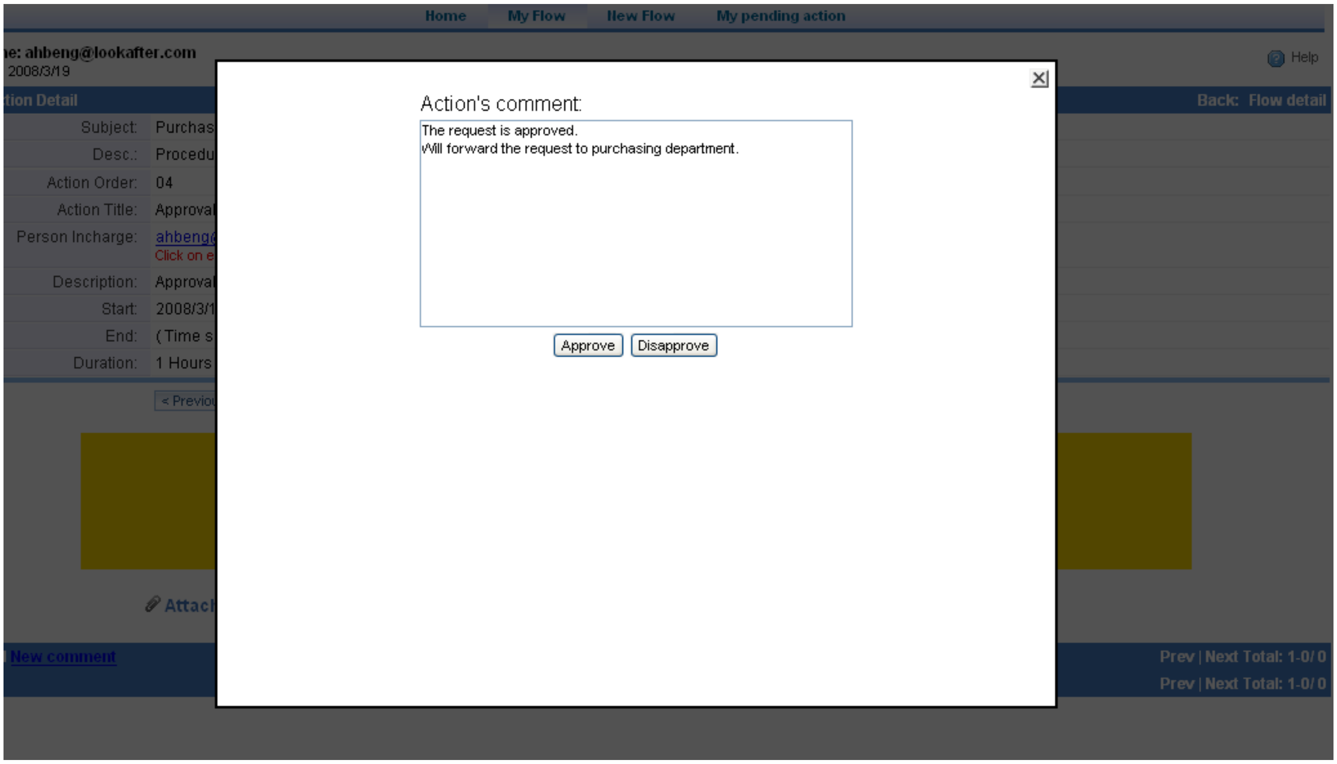


Figure 3.27

When there are more than 2 action button, we call it decision level. While execute different action button, the PIC will go to different level depends on how the workflow admin design the template. Let's assume department manager approve this request and he execute **Approve** button. Base on the design of this template, the level will escalate to the last level (You may refer back to the flow chart).

(V) Request Receive by Purchasing Department

Action: Listing — New

		Order	Title	Person Incharge	In	Last action	Out	*timespent:
1.		01	Send a Request	bernard@lookafter.com	2008/3/19 17:56:12	Done	2008/3/19 22:4:8	4Hr 11Min
2.		02	Receive by Department Manager	ahbeng@lookafter.com	2008/3/19 22:4:8	Received	2008/3/19 22:38:30	0Hr 34Min
3.		03	Examine the cost	ahbeng@lookafter.com	2008/3/19 22:38:31	Cost < 5000	2008/3/19 22:42:49	0Hr 4Min
4.		04	Approval	ahbeng@lookafter.com	2008/3/19 22:42:49	Approve	2008/3/19 22:44:42	0Hr 1Min
5.		05	Receive by General Manager	sarah@lookafter.com				0Hr 0Min
6.		06	Approval	sarah@lookafter.com				0Hr 0Min
7.		07	Request recevie by Purchase department	aaron@lookafter.com bernard@lookafter.com	2008/3/19 22:44:42			0Hr 1Min

Figure 3.28

Figure 3.28 show the flow has reached the last level Request receive by Purchasing department. The PIC of this level who is from the purchasing department have to confirm the receive of this request. He/she will receive a notification while this action active. He/She need to navigate into this level of action to execute it in order to confirm the above.

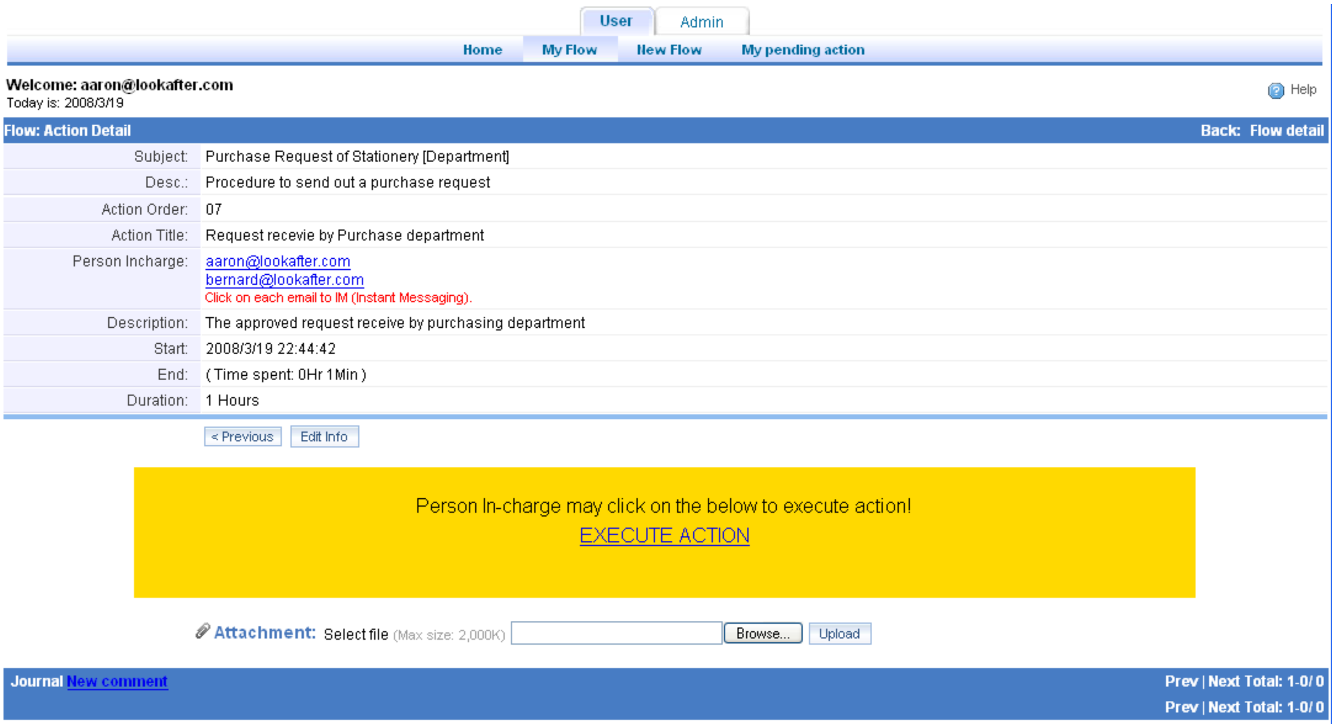


Figure 3.29

Execute action and enter the action's comment as what we have done in previous steps.

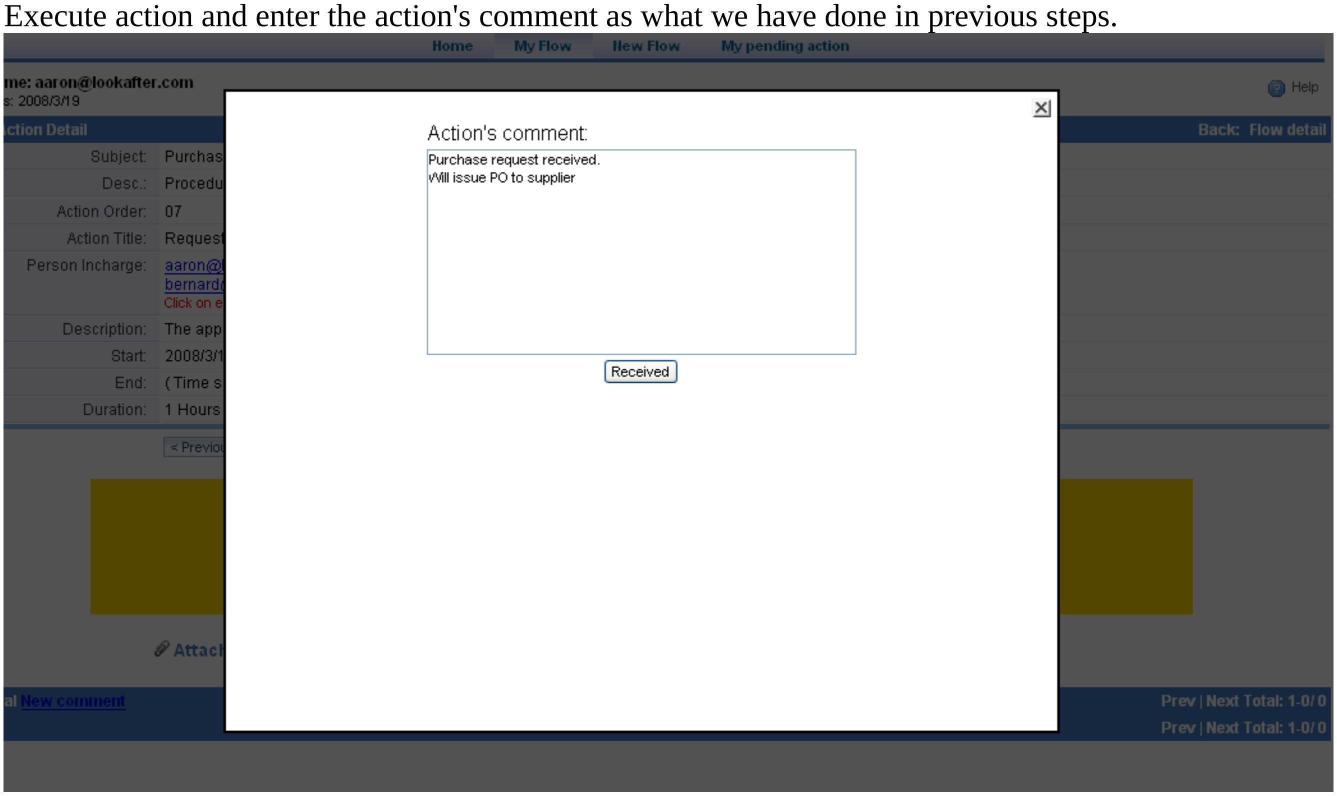


Figure 3.30

(VI) End a flow

On this stage, the flow has reached to the last step and it is going to end. This action button has assigned as a ^**endflo:** button, which means once the button executed, the flow will be terminated. A page as below will display to allow PIC to end the flow.

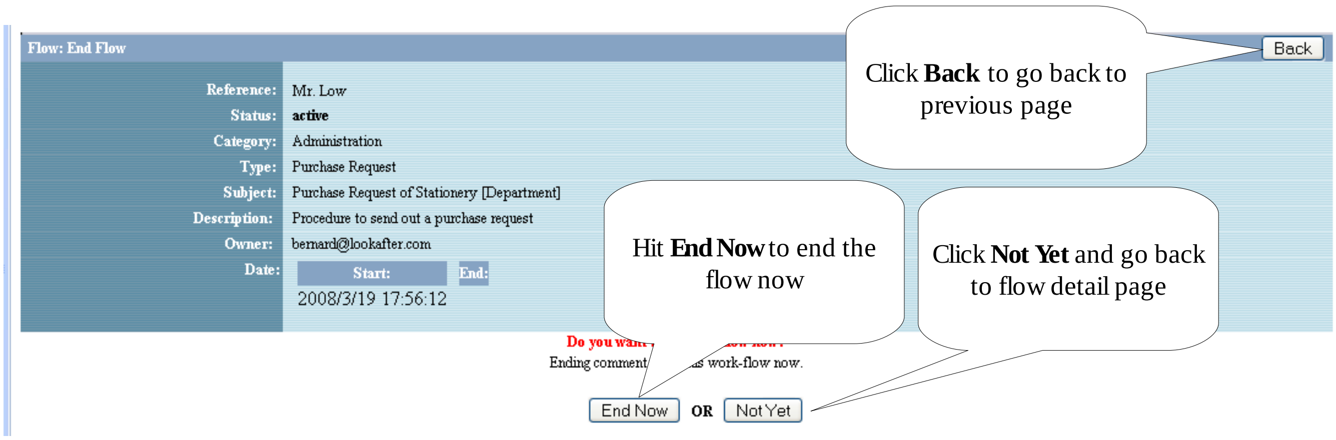


Figure 3.31

*Note: **ONLY** owner of the flow allow to end the flow. If the PIC was not the flow owner, an error message as below will be display (figure 3.32)*

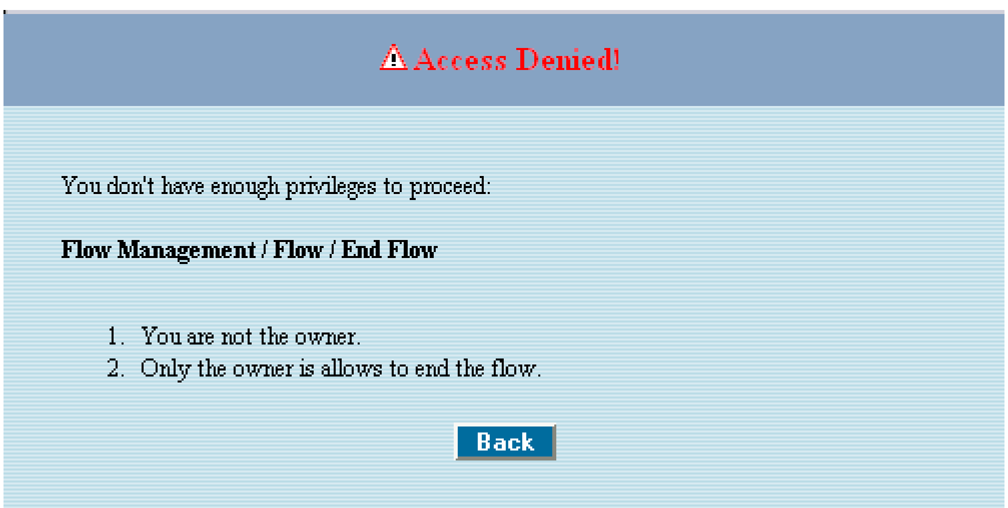
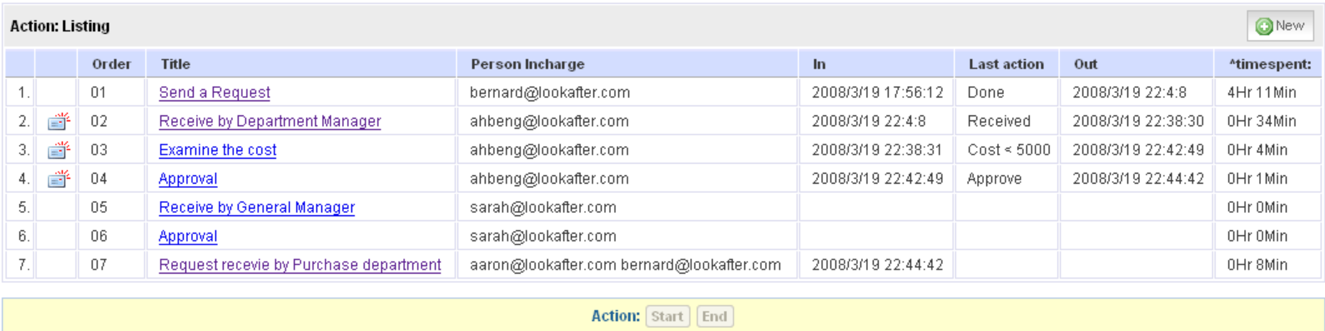


Figure 3.32

Hit **Back** button to go back to previous page. While you see this message, please contact your workflow admin or the flow owner.

Once the flow end, you will find the page as below (figure 3.33):



Action: Listing

New

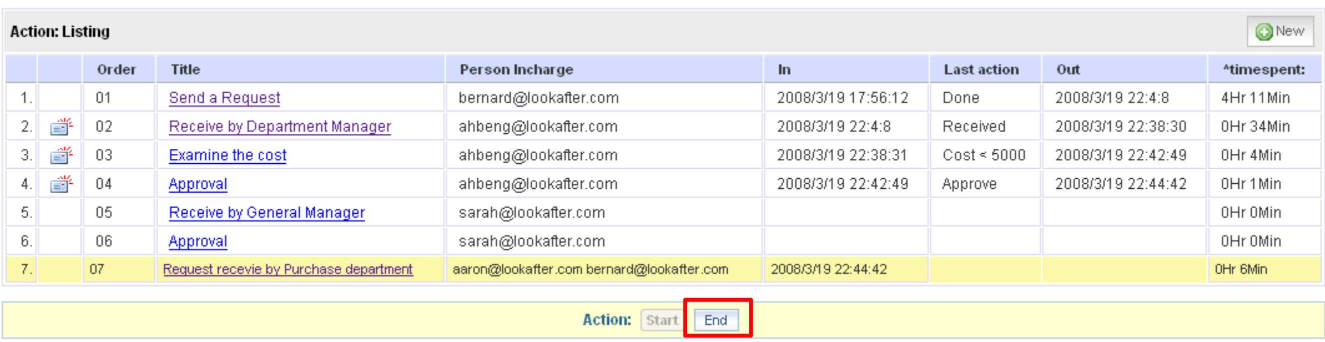
		Order	Title	Person Incharge	In	Last action	Out	^timespent:
1.		01	Send a Request	bernard@lookafter.com	2008/3/19 17:56:12	Done	2008/3/19 22:4:8	4Hr 11Min
2.		02	Receive by Department Manager	ahbeng@lookafter.com	2008/3/19 22:4:8	Received	2008/3/19 22:38:30	0Hr 34Min
3.		03	Examine the cost	ahbeng@lookafter.com	2008/3/19 22:38:31	Cost < 5000	2008/3/19 22:42:49	0Hr 4Min
4.		04	Approval	ahbeng@lookafter.com	2008/3/19 22:42:49	Approve	2008/3/19 22:44:42	0Hr 1Min
5.		05	Receive by General Manager	sarah@lookafter.com				0Hr 0Min
6.		06	Approval	sarah@lookafter.com				0Hr 0Min
7.		07	Request recevie by Purchase department	aaron@lookafter.com bernard@lookafter.com	2008/3/19 22:44:42			0Hr 8Min

Action: Start End

Figure 3.33

You will see the yellow bar gone and the **Start** and **End** button already gray out (freeze) and not allow to click.

Beside then assigned an **^enflo:** action button to the flow for end the flow, owner of the flow may end the flow in another way. He/She can click the **End** button on the flow detail page (Figure 3.34).



Action: Listing

New

		Order	Title	Person Incharge	In	Last action	Out	^timespent:
1.		01	Send a Request	bernard@lookafter.com	2008/3/19 17:56:12	Done	2008/3/19 22:4:8	4Hr 11Min
2.		02	Receive by Department Manager	ahbeng@lookafter.com	2008/3/19 22:4:8	Received	2008/3/19 22:38:30	0Hr 34Min
3.		03	Examine the cost	ahbeng@lookafter.com	2008/3/19 22:38:31	Cost < 5000	2008/3/19 22:42:49	0Hr 4Min
4.		04	Approval	ahbeng@lookafter.com	2008/3/19 22:42:49	Approve	2008/3/19 22:44:42	0Hr 1Min
5.		05	Receive by General Manager	sarah@lookafter.com				0Hr 0Min
6.		06	Approval	sarah@lookafter.com				0Hr 0Min
7.		07	Request recevie by Purchase department	aaron@lookafter.com bernard@lookafter.com	2008/3/19 22:44:42			0Hr 6Min

Action: Start End

Figure 3.34

This method will return the same result which mentioned above.

Tips

This icon show there is a new message/journal was post under the particular level

3(iii): Check the list of pending flow

Once the flow is executed, user can check their pending action at:
Virtual Office > BizApp > Work-flow > User > My pending Action

The screen below (figure 3.35) is the screen shot for pending action:

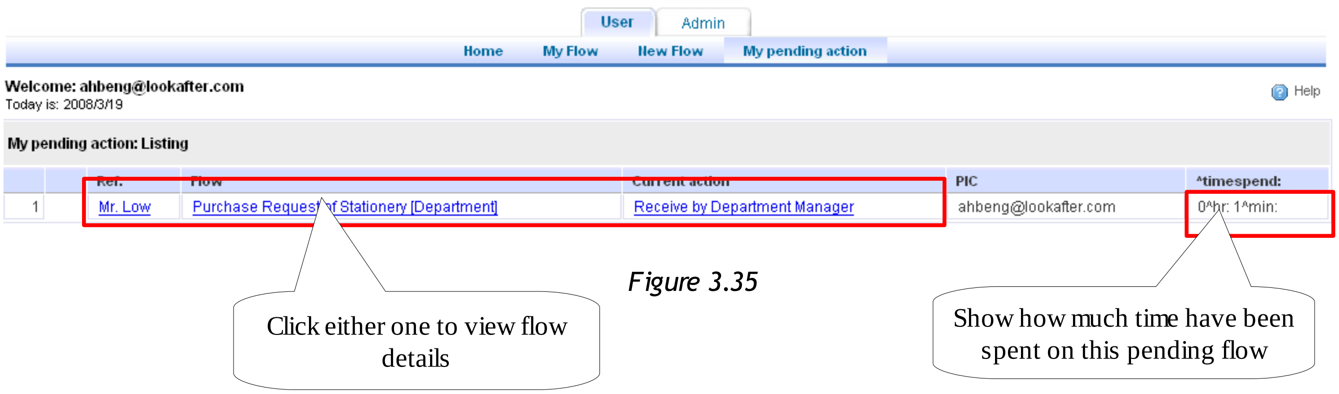


Figure 3.35

If there is no pending flow on your pending list, which means, all of your assigned job(s) has been completed.

3(iv) Others Features of Workflow

a) Journal Posting

Journal posting allow the PICs post their discussion on any level of flow. Navigate into any level of the flow to post your journal there (figure 3.36).

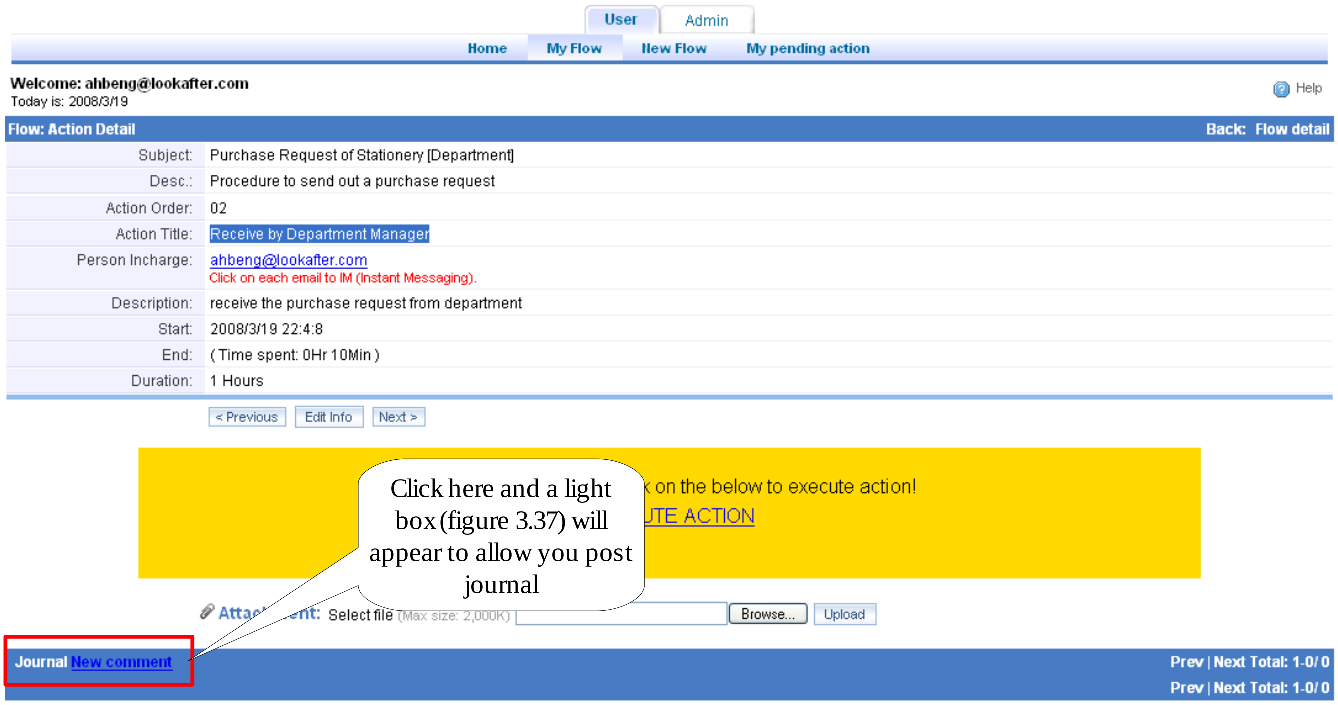


Figure 3.36

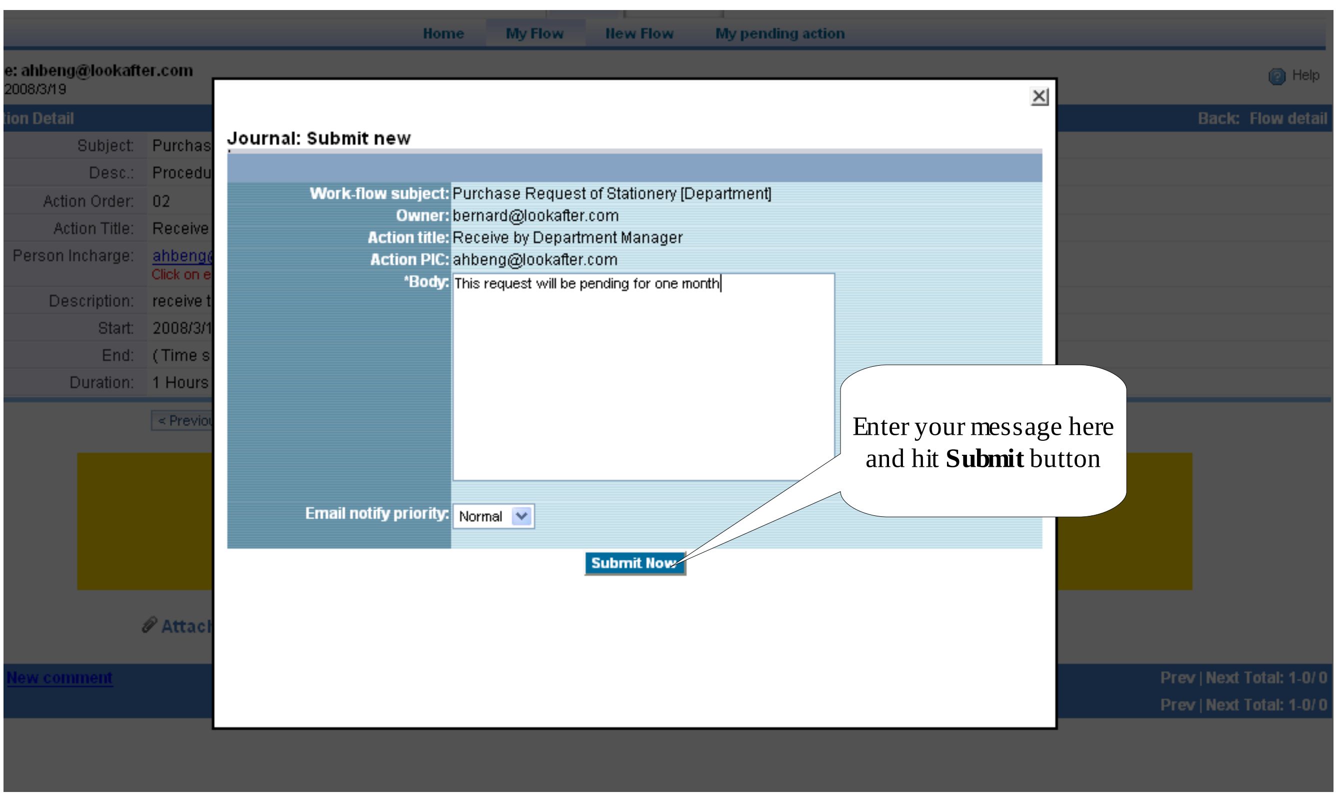


Figure 3.37

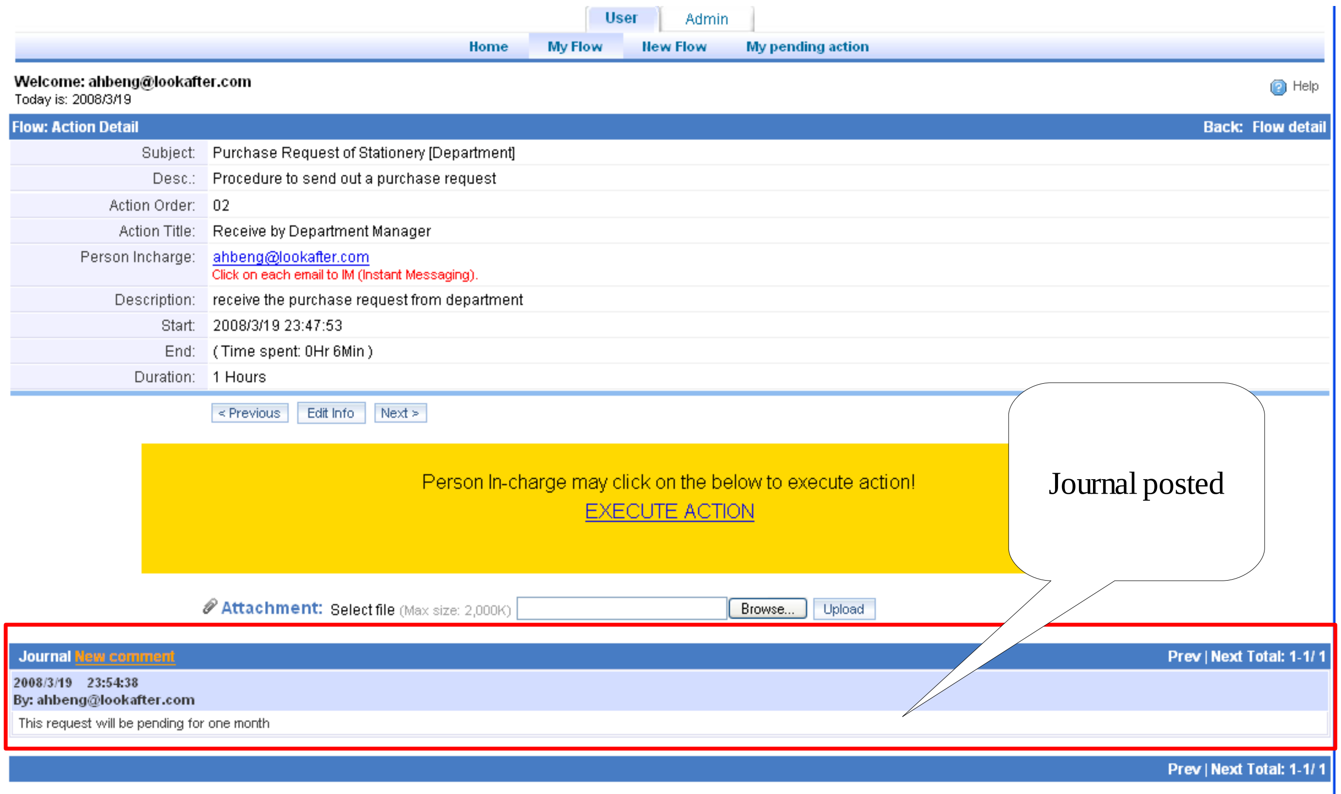


Figure 3.38

b) Upload attachment

PIC may upload relevant document to workflow for reference use. Therefore, all of the PIC may download the document directly from workflow.

PIC may upload the attachment to Flow detail page or the action detail page and the steps are the same. Figure 3.38 3.41 show how to upload an attachment to flow's detail page.

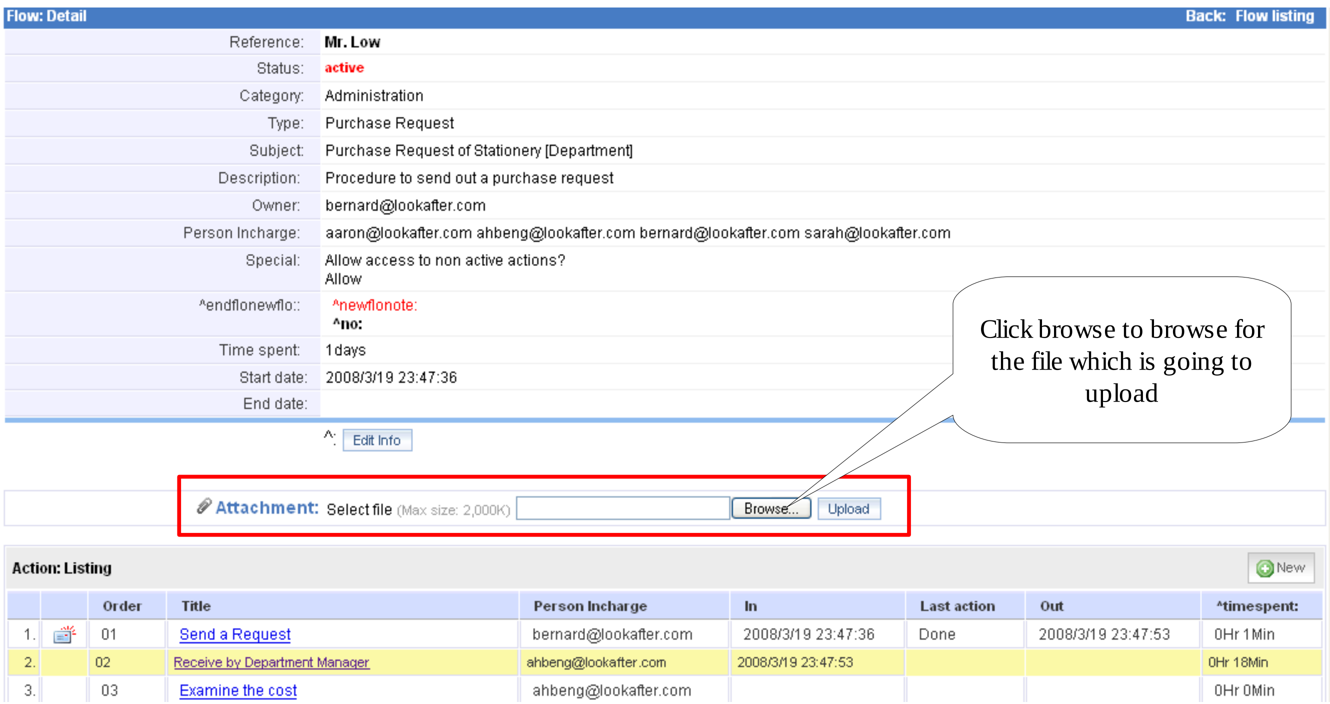


Figure 3.38

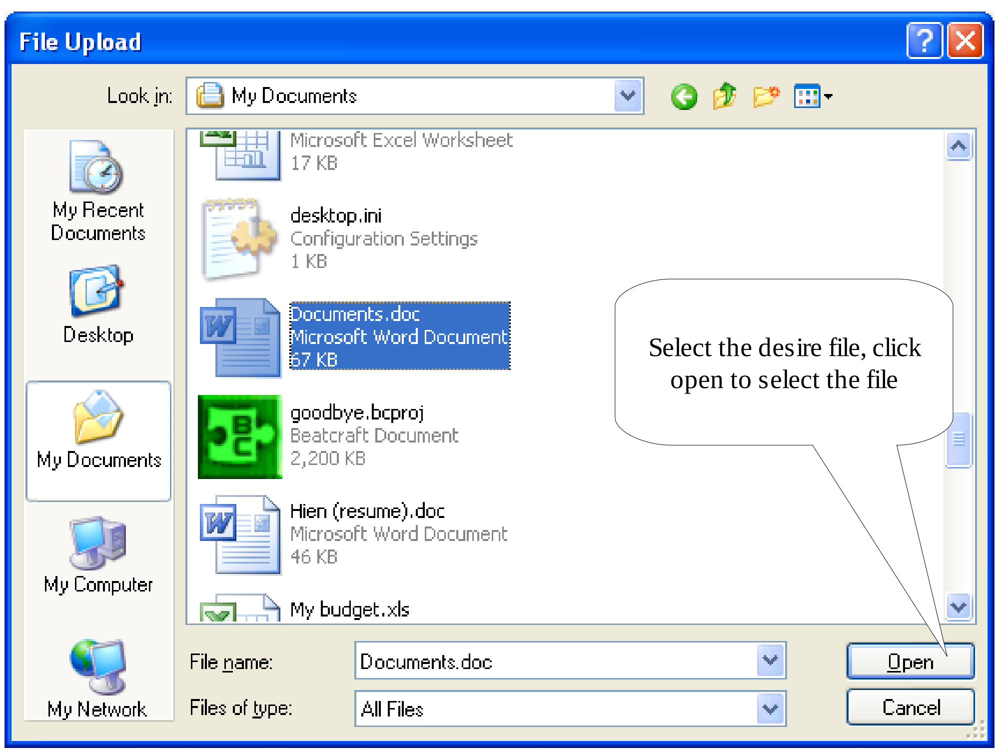


Figure 3.39

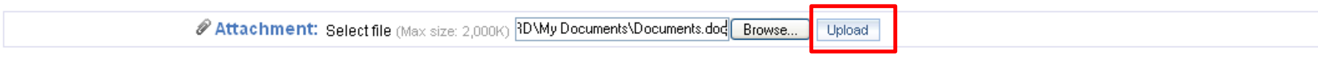


Figure 3.40

Figure 3.40 show the attachment field which already filled up with the file directory. Double check the directory. If the directory confirmed, click **Upload** button to upload the file.

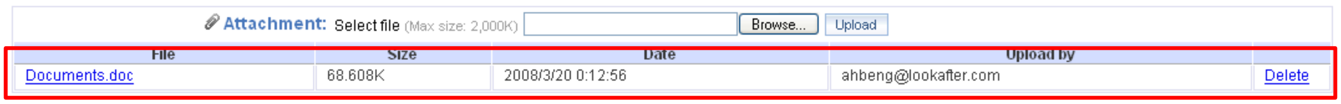


Figure 3.41

The file will take several minutes to upload. It is depends on the file size which you uploaded. The bigger file size, the longer time will take. Once the upload process completed, you will be able to see the attachment list on your page (as per highlighted on figure 3.41).

Chapter 4: Flow Transfer

Go to Virtual Office > BizApp > Work-flow > Admin > Transfer flow, for transfering an existing flow from one person in charge to the another

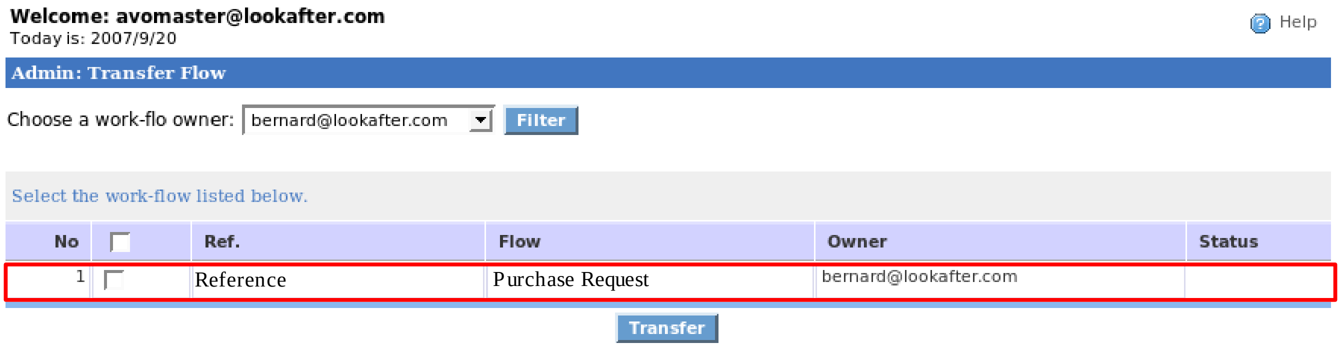


Figure 4.1

Step 1.
Checked (place a tick) on the desired flow (figure 4.1) which you wish to transfer, click on **Transfer**.

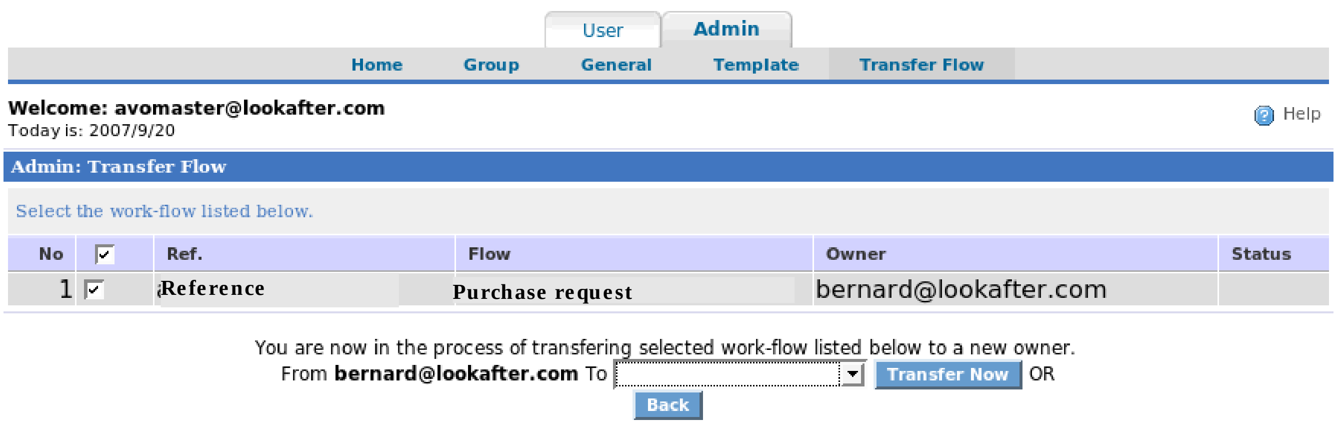


Figure 4.2

Step 2.
Drop down the menu (figure 4.2) to select the new assignee's email address and click **Transfer Now** to transfer the particular flow to the selected person