Core Concepts

Action List

A special channel in the OneStart portal that displays all *eDocs* currently routed to the user for action. Users may set display preferences and filter the list by *eDoc* properties. The channel is displayed in a focus channel and initiated from the *Action List* icon at the left end of the gray search bar.

Another special channel, the *Delegate Action List*, displays all *eDocs* currently routed to the user under *Primary* or *Secondary Delegation*.

Action Request or Action Requested

The Workflow designations for the action that a user is requested to take on an *eDoc* in his/her *Action List* in the course of its routing:

Approve - approve or disapprove an *eDoc* and continue its routing
Complete - complete the contents of an *eDoc* and continue its routing
Acknowledge - acknowledge viewing an *eDoc* ; required for Final Approval
FYI - acknowledge viewing an *eDoc* ; not required for further routing

Action Taken

The Workflow designations for the action that the user has taken on an *eDoc* in his/her *Action List* in response to an *Action Request*:

Saved – user has saved document for later consideration
Cancelled – user has cancelled document; routing stopped
Disapproved – user has disapproved document; routing stopped; Acknowledge *eDocs* sent to prior approvers
Completed – user has completed document; implicit approval
Approved – user has approved document
Acknowledged – user has viewed document; action recorded
FYI – user has viewed document; no action recorded
Adhoc Routed – user has ad hoc routed document to another reviewer; implicit approval
Blanket Approved – user has exercised blanket approval up to specified point in route path

Delegate

A user that has been registered with Workflow to act on behalf of another user. The *Delegate* acts with the full authority of the delegator in a *Delegate Action List*. Delegation is assigned for a specified *Document Type* and as either *Primary* or *Secondary Delegation*. The registration of *Delegates* is managed by the *Workflow Client* for the *Document Type*.

Document Search

A special channel in the OneStart portal that displays all *eDocs* that match user-selected criteria. Users may search by a combination of *eDoc* properties such as *Document Type* or *Routing Id*, or more specialized properties in the Detailed Search. The format of the search results is the same as the *Action List*. The channel is displayed in a focus channel and initiated from the *Document Search* icon at the left end of the gray search bar.

Another special channel, the *SuperUser Document Search*, displays and gives access to all *eDocs* that match selection criteria.

Document Status or Routing Status

The Workflow designations that describe the current status of an *eDoc* in the course of its routing:

Initiated – document is being created by author prior to routing
Cancelled – document has been cancelled by author prior to routing or by reviewer during routing; routing stops

Saved – document has been saved by author prior to routing, or by reviewer prior to action; sent to Action List

Enroute – document is being routed

Processed – document has been approved by all reviewers

Final – document postprocessor has completed transaction after all approvals

Disapproved – document has been disapproved by reviewer; routing stops

Exception – document requires intervention by Exception Workgroup; sent to Action List of each member of Exception Workgroup registered for this document type

Document Type

A reference to the set of *eDocs* that perform a particular business function. Each *eDoc* is an instance of a *Document Type* and conducts the same type of business transaction as others of that *Document Type*.

A *Document Type* may be part of a hierarchy of *Document Types*, each of which inherits the properties of its *Parent Document Type*.

EDoc

An electronic document containing the information for a business transaction that is routed for approval in Workflow. It is typically initiated in a OneStart channel and its routing is conducted in respective *Action Lists*

Initiator

A user who initiates or authors a new *eDoc* for *Routing.* This action is typically taken in a dedicated channel or from a link in OneStart.

Route Header or Document Header

The set of routing data for an *eDoc* required by Workflow, analogous to a routing slip for paper documents. It includes information such as the *Routing Id*, the *Initiator* (author), the creation time/date, etc.

Route Level

An integer index for the series of *Route Types* specified for a *Document Type*. Together they indicate the order in which the *Route Types* are processed for *Routing.*

Two additional *Route Types* are required for each *Document Type* and are assigned special indexes:

-1 *Exception Routing*

0 *Ad Hoc Routing*

Route Type

The name of an organized path or scheme that controls a sequence of reviewers in required *Routing.* Several *Route Types,* each with a different *Route Level,* may be assigned to a *Document Type* to fulfill its *Routing.* *Route Types* are typically established around organization hierarchies, responsibilities, or managers. All of the *Route Types,* including the default *Exception Routing* and *Ad Hoc Routing,* together comprise the *Route Template* for the *Document Type.*

Routing

The process of gaining necessary approvals for business transactions expressed as electronic documents.

Also, the complete path of users on which action on an *eDoc* is requested, i.e., the history of the routing activity of an *eDoc* .

Workgroup

A designated set of users that share a common functional responsibility

Workflow Client

A Web-based application that uses OneStart Workflow to conduct a business transaction. It manages the creation, routing, and processing of dedicated *eDocs* necessary to complete the transaction.

FlexRM Terminology

Base Attribute

One of the following *Rule Attributes* that are required for every *Routing Rule*:

Rule Template - the name of the *Rule Template* used to create the *Routing Rule*
Document Type - the *Document Type* to which the *Routing Rule* applies
Active - true/false flag to indicate if *Routing Rule* is active, i.e., will be considered for a match
From Date - the inclusive start date for which the *Routing Rule* will be considered for a match
To Date - the inclusive end date for which the *Routing Rule* will be considered for a match
Ignore Previous - true/false flag to indicate if previous *Routing* for approval will be ignored

Extension Attribute

One of the *Rule Attributes* added in the definition of a *Rule Template* that extend beyond the *Base Attributes* to differentiate the Template. If its Required field is checked in the Template, then it is a *Required Extension Attribute*. Otherwise, it is an *Optional Extension Attribute*.

Flexible Document

A general document structure that can be used as is or subclassed to add *Routing* behavior to another document. It is part of the *Workflow Client* API provided with OneStart Workflow. It provides convenience document functions like routing interactions and a convenient way to add attributes that will control *Routing* through the workflow engine.

Flexible Route Module

The *Route Module* that performs the *Routing* for any type of *Routing Rule* defined through *FlexRM*. It generates *Action Requests* when a *Rule* matches the data values contained in the *eDoc* .

FlexRM

An abbreviation of "Flexible Route Management," a standard Workflow routing scheme based on rules rather than dedicated table-based routing.

Optional Extension Attribute

An *Extension Attribute* that is <u>not</u> marked Required in a *Rule Template*. It may or may not be present in a *Routing Rule* created from the Template. It can be used as a conditional element to aid in deciding if a *Rule* matches. These Attributes together are simply additional criteria for determining a match.

Required Extension Attribute

An *Extension Attribute* that is marked Required in a *Rule Template*. It will be present in every *Routing Rule* created from the Template.

Responsible Party Attribute

Rule Attribute that identifies the *Reviewer* of the *eDoc* when the *Routing Rule* criteria are matched. The *Reviewer* may be either a person(s) or a *Workgroup*. The attribute is set for every *Routing Rule*.

Routing Rule or Rule

A record that contains the data for the *Rule Attributes* specified in a *Rule Template*. It is an instance of a *Rule Template* populated to determine the appropriate *Routing*.
The *Rule* includes the *Base Attributes*, the *Required Extension Attributes*, and any *Optional Extension Attributes*, along with the *Responsible Party Attributes* that were declared in the *Rule Template*.

Rule Attribute

A core enterprise data element contained in an *eDoc* that controls its *Routing*. Examples are *Document Type*, *C*hart and Organization, and Account. It participates in routing as part of a *Rule*

Template.

Types of *Rules Attributes* include *Base Attributes, Extension Attributes,* and *Responsible Party Attributes.*

A *Rule Attribute* may be backed by a Java class to provide lookups and validations of appropriate values.

Rule Template

A blank *Routing Rule* that serves as a template or pattern for the *Routing Rule*. All of the *Rule Attributes* for the *Routing Rule*, both *Required* and *Optional*, are included in the *Rule Template*. It therefore defines the structure of the *Routing Rule* to *FlexRM*.

Related Terms

Ad Hoc Routing

A *Route Type* that may be made available as an option to the *Reviewer* to route an *eDoc* to another *Reviewer* not in the *Routing* for the given *Document Type*. If enabled by the *Doc Handler,* it allows the user to choose an additional user or *Workgroup* as part of the review. *Routing* returns to the prescribed path after the *Ad Hoc Routing*.

Annotation

Optional comments added by a *Reviewer,* intended to explain or clarify the approval decision or advise subsequent *Reviewers.*

Blanket Approval

Authority given to designated *Reviewer*s to approve an *eDoc* to a chosen *Route Level*. The action bypasses approvals that would otherwise be required in the *Routing*. If appropriate for the *Reviewer,* the *Doc Handler* displays the *Blanket Approval* button along with the other options. *Reviewers* who are skipped are sent Acknowledge *eDocs* instead.

Delegate Action List

A separate *Action List* channel in the OneStart portal for delegate actions. After the delegate selects the delegator for whom to act, an *Action List* of *eDocs* sent to the delegator appears. For both *Primary* and *Secondary Delegation,* the delegate may act on any of the entries with the full authority of the delegator.

Doc Handler

The process that a *Workflow Client* uses for the appropriate display of an *eDoc* . When a user selects an *eDoc* in the *Action List,* the *Doc Handler* manages access permissions, content format, and user options according to the requirements of the *Workflow Client.*

Exception Routing

A required *Route Type* in every *Document Type* that handles error conditions. When Workflow or the *Workflow Client* encounters a situation from which it cannot procede, the routing *eDoc* goes into *Exception Routing*. It is diverted to an Exception *Workgroup* designated for that *Document Type*. The intervention of this *Workgroup* is required to resolve the problem.

Final Approval

Document Status in which the *eDoc* has received all of the required approvals and the *Postprocessor* has completed its designated business functions.

Parent Document Type

A *Document Type* that is identified as a *Parent Document Type* in another *Document Type*. The child type therefore inherits the properties of the parent, any of which it may override. A *Parent Document Type* may also have a parent as part of a hierarchy of *Document Types.*

Preferences

User options in an *Action List* for displaying the results list of *eDocs* . Users can click the
Preferences button in the top margin of the *Action List* to display the Action List Preferences
screen. For example, users may change the columns displayed, the background colors by
Document Status, and the number of *eDocs* displayed per page.

Postprocessor

The process that a *Workflow Client* uses to complete the business functions of an *eDoc* . When
all required approvals are completed, Workflow notifies the *Postprocessor* accordingly. At this
point the *Postprocessor* is responsible for completing the business transaction in the manner
appropriate to its *Document Type.*

Primary Delegation

A form of delegation for *Routing* in which the designated user acts as an ongoing delegate for the
reviewer. The *eDoc* appears only in the *Delegate Action List* of the delegate, who acts with the
same authority as the delegator.
The delegation must be registered in Workflow to be in effect.

Reviewer

A user acting on an *eDoc* in his/her *Action List*, and who has therefore received an *Action
Request* for the *eDoc* .

Route Log

A special channel in the OneStart portal that displays the *Routing* of the selected *eDoc* . The
channel is displayed in a focus channel and initiated from *Action Lists* and *Documents Searches.*
A Route Log icon for each *eDoc* entry appears in its right most column. The Log displays a table
of general Document Information for the *eDoc* and a detailed list of current and pending *Actions
Taken.*

Route Module

The process that Workflow uses to determine the *Routing* for a given Route Type. FlexRM is a
general *Route Module* that is rule-based. Dedicated *Route Modules* conduct specialized *Routing*
based on routing tables.
Workflow provides some *Route Modules* for routing through established organizational
hierarchies. *Workflow Clients* may optionally provide their own *Route Modules.*

Route Template

The set of *Route Types* assigned to a *Document Type* to fulfill its required *Routing.*

Routing ID

The unique positive integer that Workflow assigns sequentially to each *eDoc* created for *Routing.*
It appears in the left most column in *Action Lists* and *Document Searches* and as the link to
display *eDocs* . *Workflow Clients* may use this value as their Document ID*,* or they may choose
to create their own Document ID to incorporate business logic.

Secondary Delegation

A form of delegation for *Routing* in which the designated user acts as a temporary delegate for the
delegator. It may be used during an absence. The *eDoc* appears in the *Action Lists* of both the
delegator and the delegate, who acts with the same authority as the delegator. When either acts
on the *eDoc* , it disappears from both *Action Lists.*
The delegation must be registered in Workflow to be in effect for a range of dates.

SuperUser

A *Reviewer* who has been given special permission in Workflow to perform *SuperUser Approval*
on *eDocs* of a certain *Document Type.*

SuperUser Document Search

A separate *Document Search* channel in the OneStart portal for *SuperUser* access. The search results are the same as those of the *Document Search*, but *SuperUsers* may view and give *SuperUser Approval* to any *eDoc* in the results list.

SuperUser Approval

Authority given to designated *Reviewers* to approve an *eDoc* to a chosen *Route Level*. The action bypasses approvals that would otherwise be required in the *Routing*. It is available in the *SuperUser Document Search*. *Reviewers* who are skipped are <u>not</u> sent Acknowledge *eDocs* .