# CB 5 Business Process Procedures

The Laserfiche Document Management System includes a Business Process component that enables Users to initiate a process to electronically route a document through a pre-defined path to various offices/approvers. One that has been implemented in the AgriLife repository will route CB-5s through their approval process. The Business Process takes an original document from the originating District office and routes electronic shortcuts to the document through the approval process until the final approval is received, at which time it moves the document for final filing This guide shows users how to initiate the process.

1. The originating district will place the document to be routed through the CB-5 Business Process in a Work In Progress/Unit folder titled *Incoming Scans, although this initial location is not a requirement. Each of the districts has an Incoming Scans and Pending Approval folder in their Work In Progress unit folder specifically for Workflow/Business Processes.
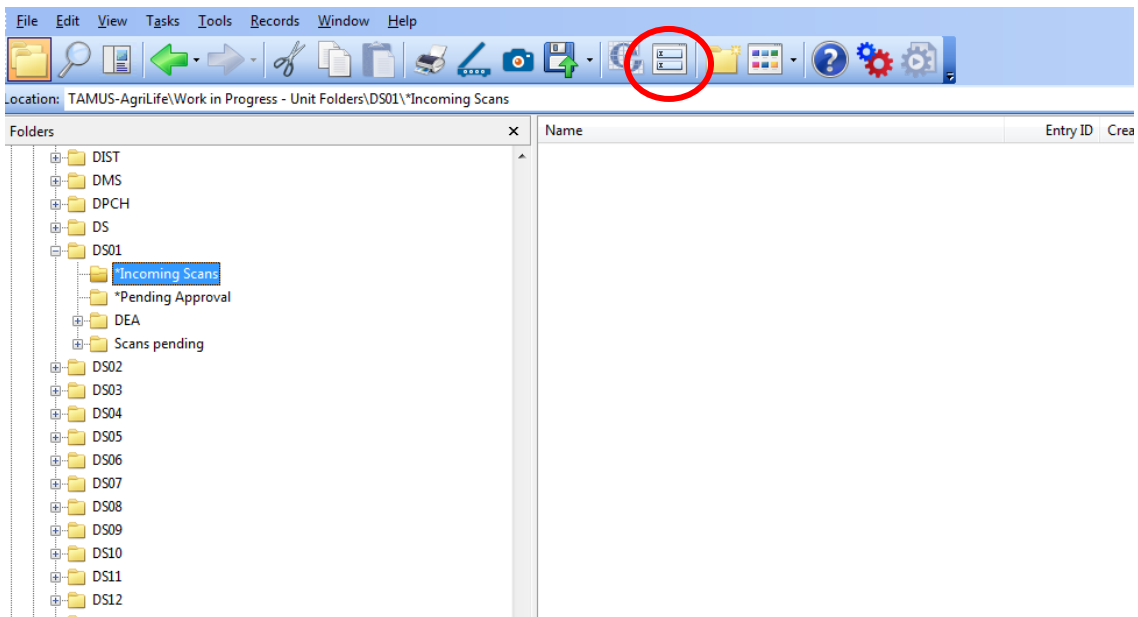
2. The document to be routed via the CB-5 Workflow should then have the CB-5 template attached to it. This can be accomplished by clicking on the Fields icon as shown on the right side of the toolbar above or selecting Action>View Fields and then choosing the CB-5 template from the list of available templates.

3. The required information for the template, County, District, and Fiscal Year as well as EPA information, if applicable, should be filled in the appropriate template fields.

4. At this point the document is ready to have the Business Process started. To start the Business Process, click on the document, then click Tasks>Start Business Process>More. You can also start the business process by right clicking on the document and select Start Business Process>More
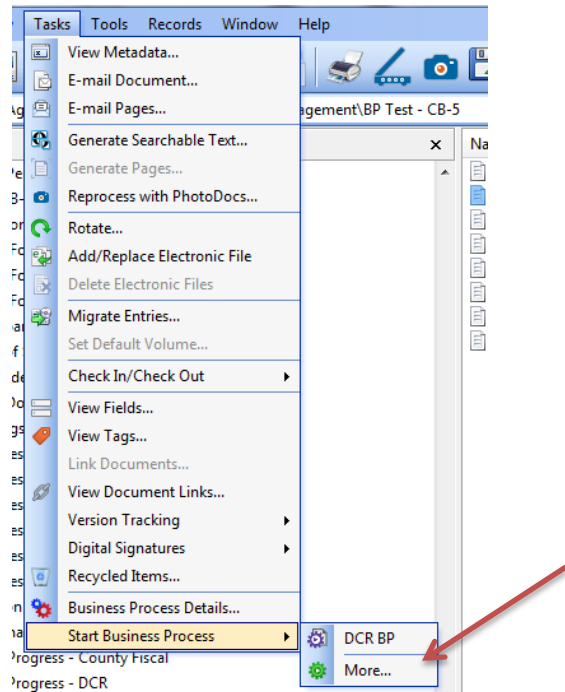

5. On the screen that pops up, select CB5-BP, and click the Start button with the Green arrow.   Note: If you have added the CB5-BP process icon to your toolbar (instructions are at http://aglfdocs.tamu.edu/documents/2014/09/adding-icons-to-toolbar.pdf) you can just click on the icon to start the process.
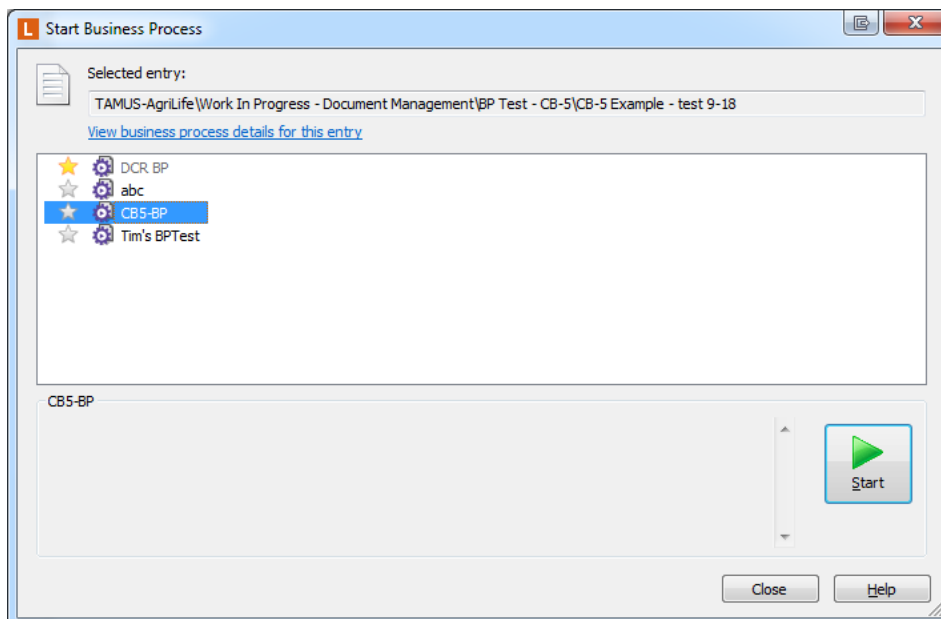
6. Upon clicking start you will get a pop-up as shown below. Select Yes.
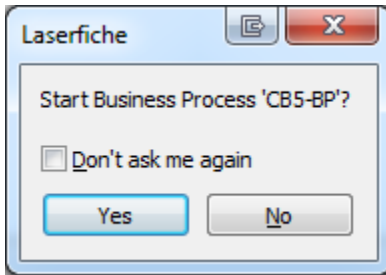

7. You will then get a pop-up screen that indicates you have started the business process.
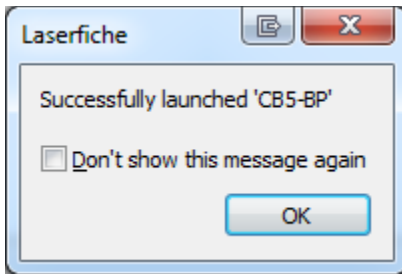

Click OK, then, if the Start Business Process screen does not close, click on "Close".

8. It is possible, to view and modify the template field values through the document viewer when viewing the image. This can be done if annotations such as highlights or sticky notes need to be applied to the document prior to submission into Workflow.
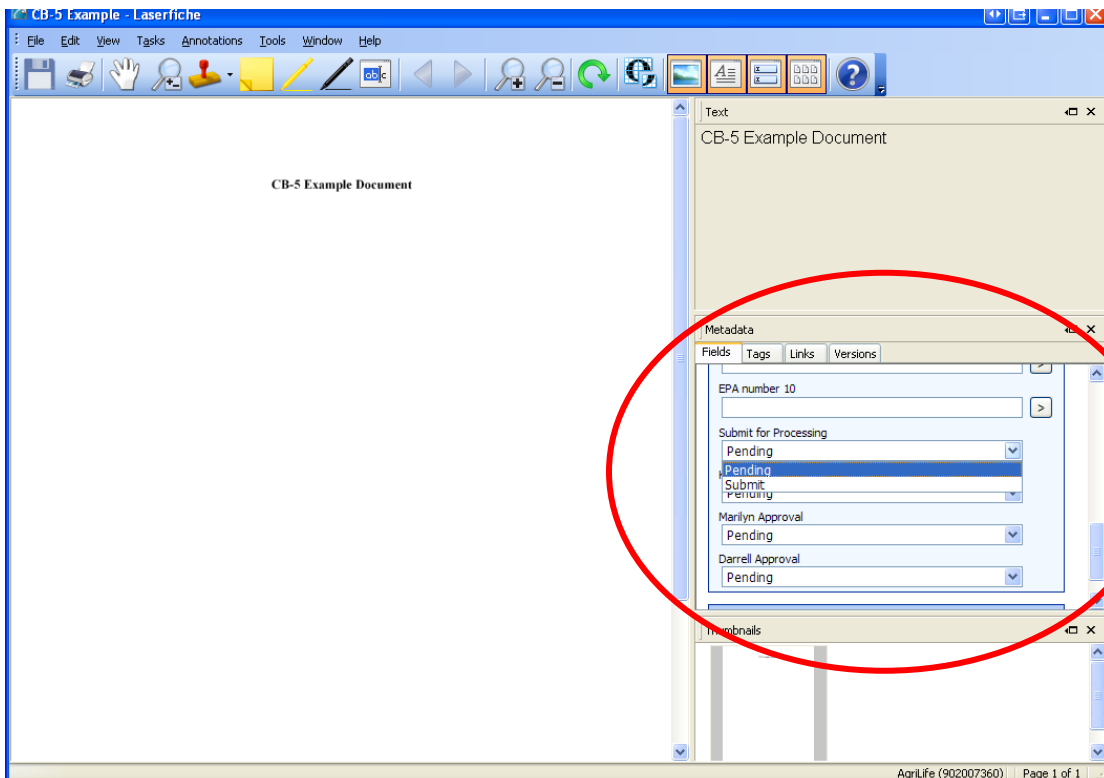
6. When the Business Process is started, after it moves the CB-5 into the *Pending Approval folder, a shortcut is placed in the Work In Progress – Budgets folder for a budget review. Additionally, an e-mail is generated and sent to the appropriate Budget Office representative.
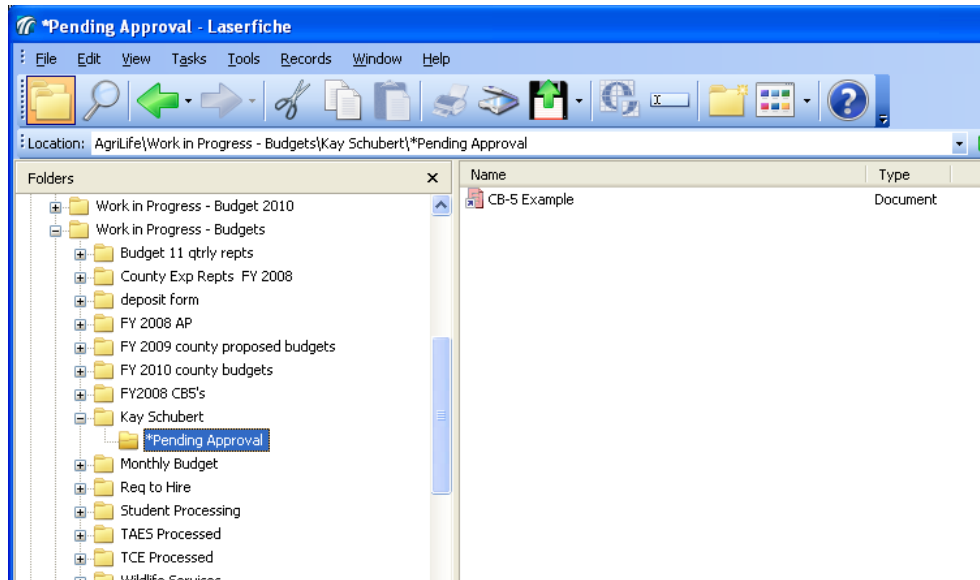

7. The Budget Office representative will then review the document moves the document on to the next person for review. This is done by changing the respective template field value from Pending to Approved and selecting Save. As described earlier this can be done through viewing the field values and selecting OK or through the document viewer interface by selecting "Save" This removes the shortcut from their folder creates a shortcut to the document in the appropriate folder for the Assistant to the Associate Director for County Programs as well as sends an e mail notification.
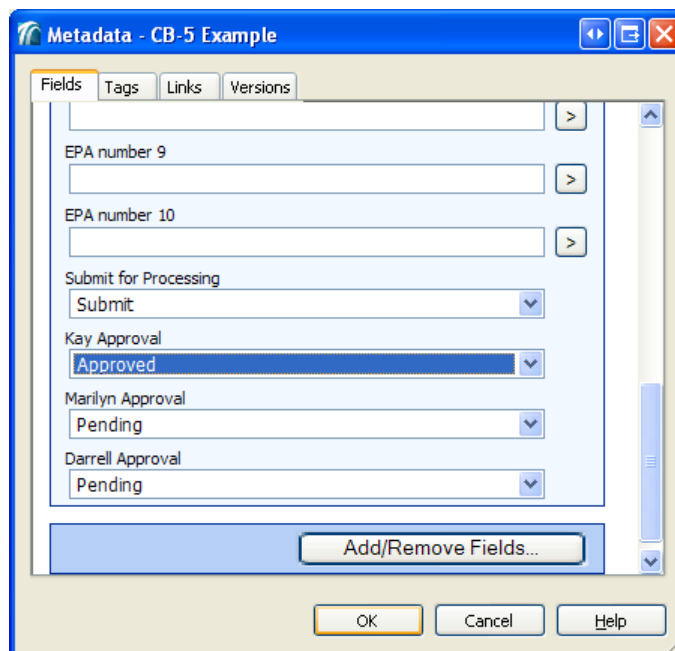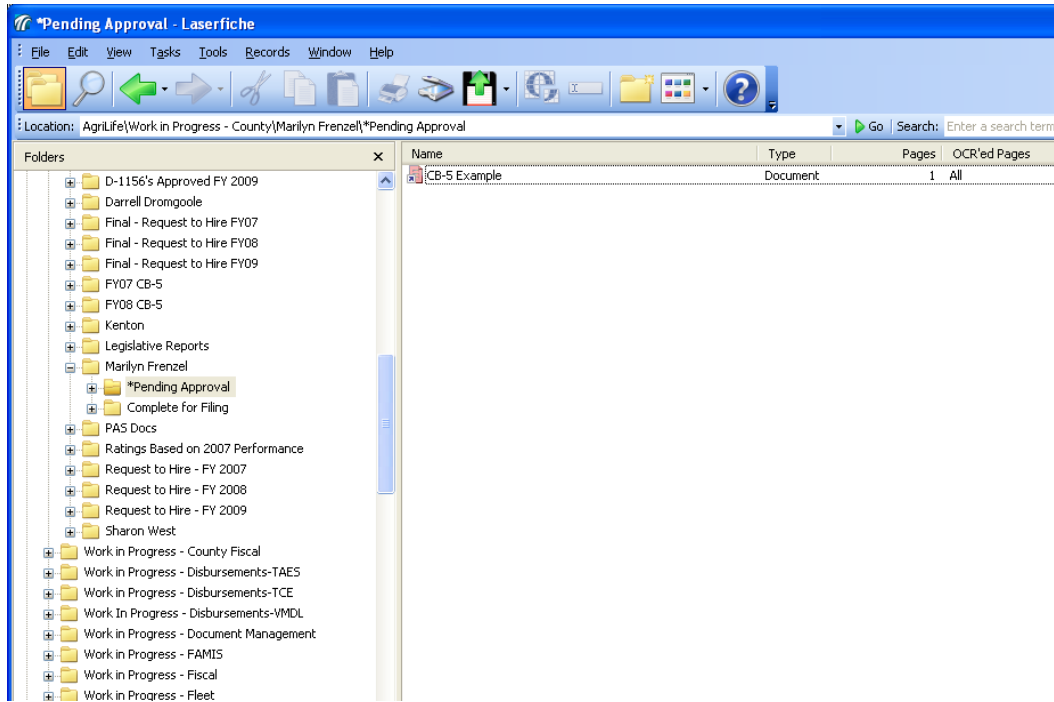
8. The Assistant then repeats the same process of reviewing and if applicable approving the document to move it to other approvers if required.
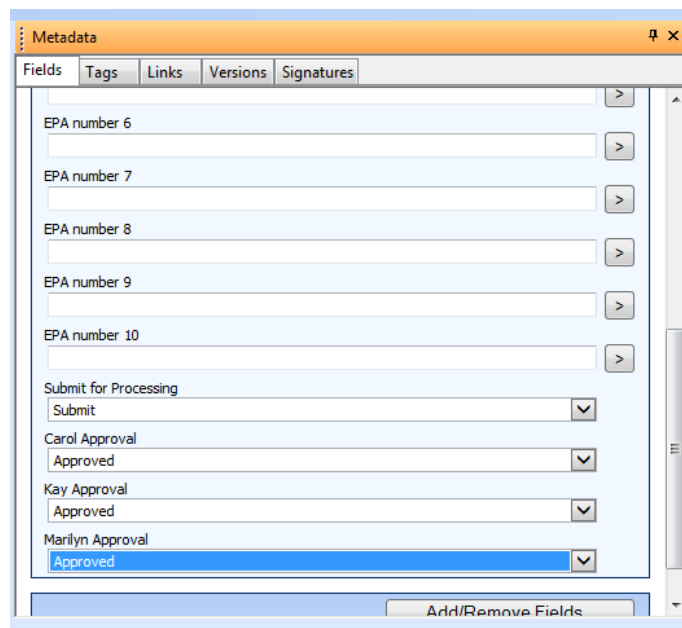
9. When the final Approval is completed, the business process moves the original document from the originating District's Pending Approval folder to a County folder in Laserfiche section 4.5.5.1.3 or if an error has been made in the county name, to a folder for manual filing.