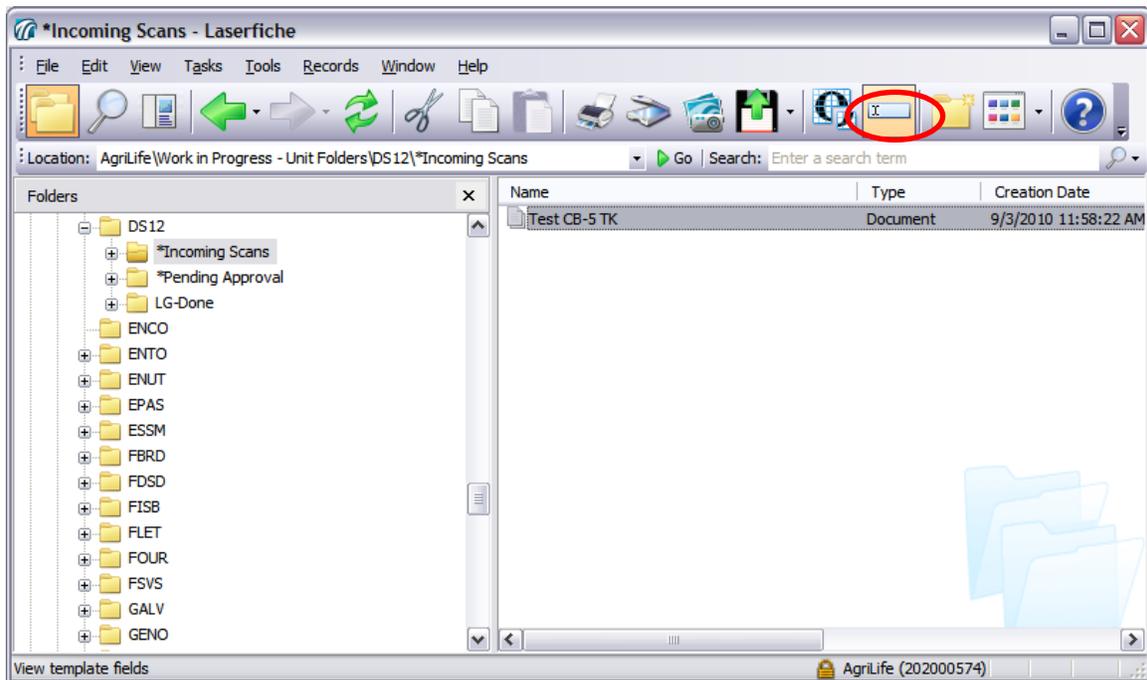


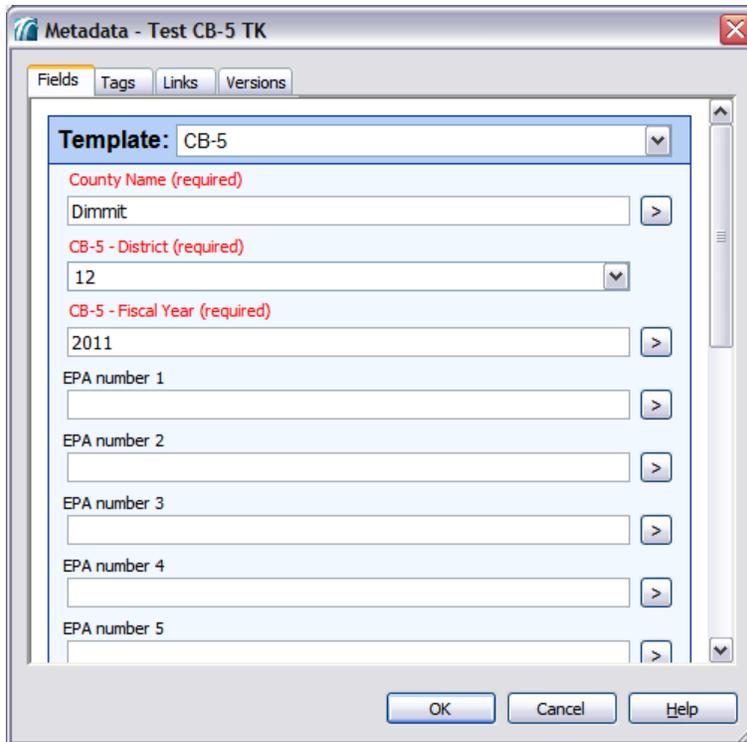
CB-5 Workflow Procedures

The Laserfiche Document Management System includes a Workflow component that enables documents meeting certain criteria to be electronically routed through a pre-defined Workflow "Route." One workflow that has been implemented in the AgriLife repository will route CB-5s through their approval process. The workflow takes an original document from the originating District office and, when certain criteria are met, it routes electronic shortcuts to the document through the approval process and then moves the document for final filing in the proper location in the repository. This guide demonstrates the process as an example document is routed through the workflow.

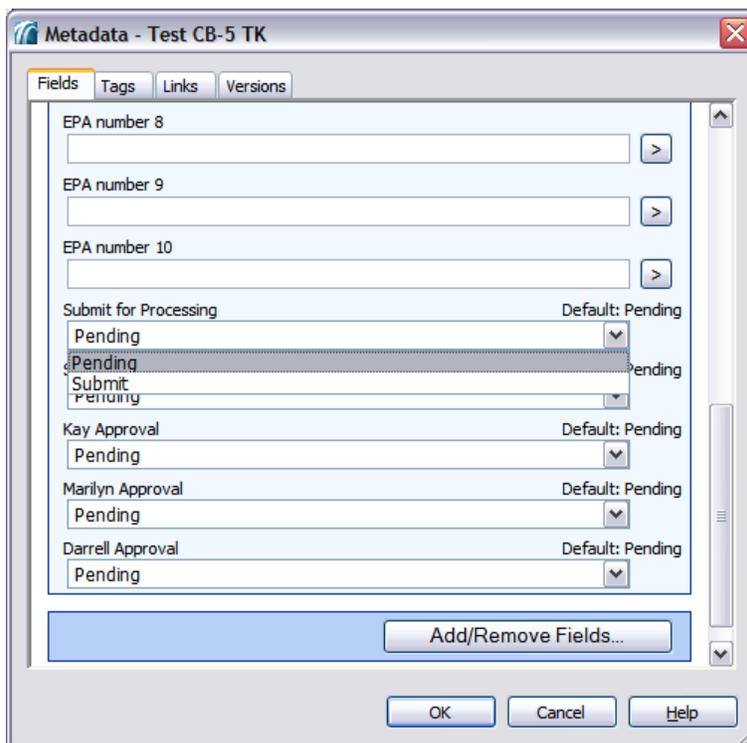
1. The originating district will place the document to be routed through the CB-5 Workflow in a Work In Progress\Unit Folders\DSXX (the district number) folder titled *Incoming Scans. Each of the districts has an *Incoming Scans and *Pending Approval folder in their Work In Progress unit folder, specifically for Workflow. (Note: The district can scan the CB-5 directly into this folder with the CB-5 template added and completed EXCEPT for selecting "Submit.")



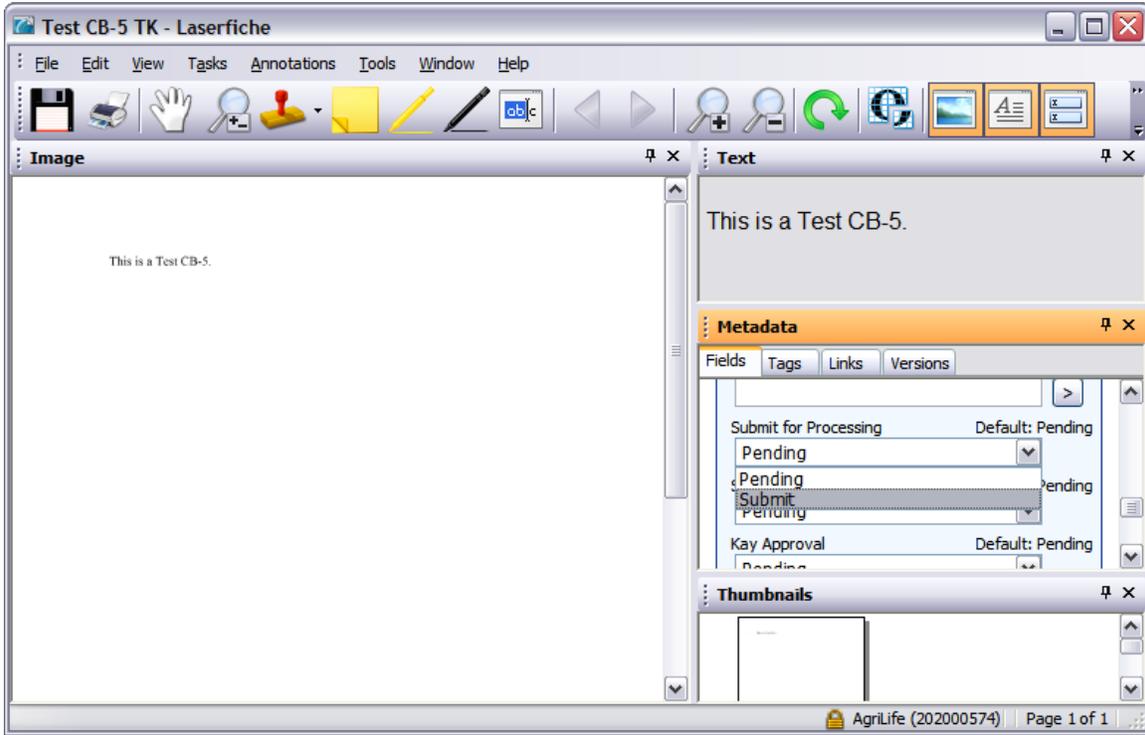
2. The document to be routed via the CB-5 Workflow should then have the CB-5 template attached to it (if not already accomplished). This can be accomplished by clicking on the Fields icon as shown on the right side of the toolbar above or selecting Action>View Fields and then choosing the CB-5 template from the list of available templates.
3. The required information for the template, County Name, District, and Fiscal Year, as well as EPA information, if applicable, should be filled in the appropriate template fields. Please be sure this information is correct, as the CB-5 Workflow process depends upon its accuracy.



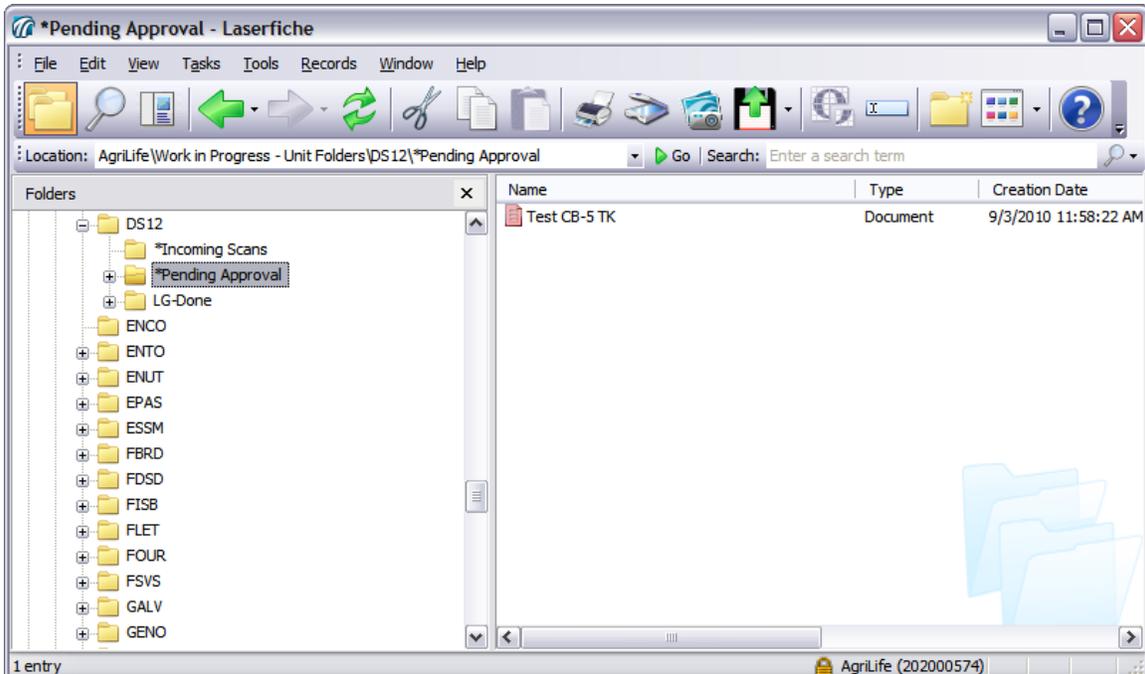
4. At this point the document is ready to be placed into the Workflow "route". This is started by placing the document into the *Incoming Scans folder, if it is not already in that folder, and submitting the document by changing the value in the "Submit for Processing" template field from "Pending" to "Submit" and clicking OK.



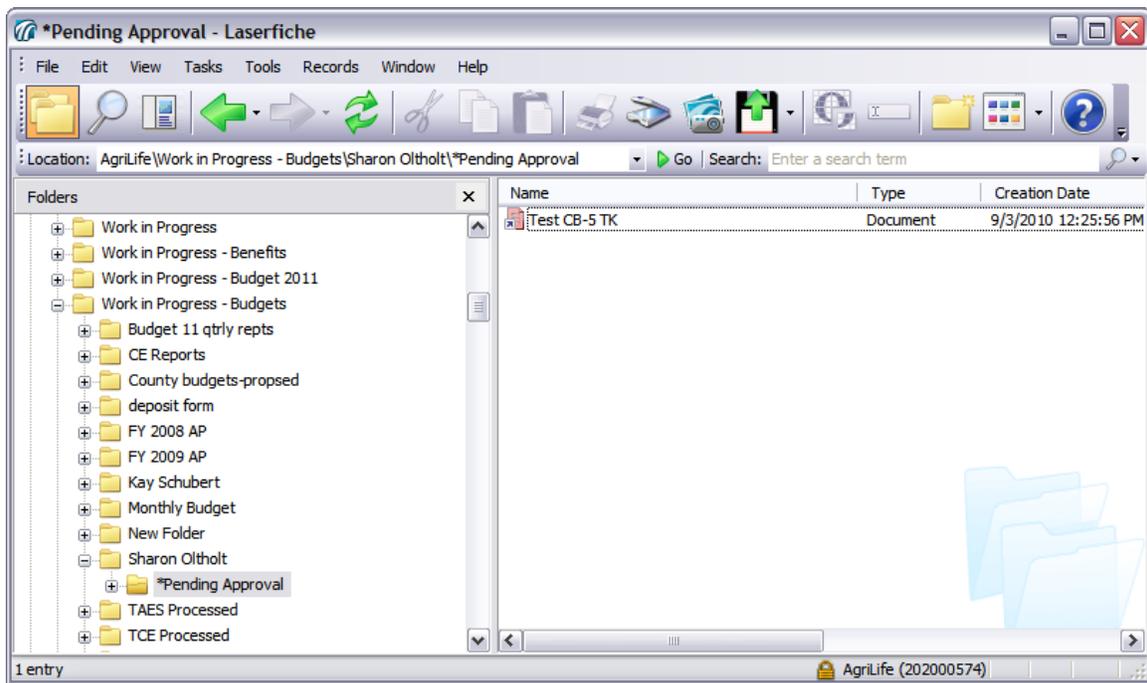
- It is also possible to view and modify the template field values through the document viewer when viewing the image. This can be done if annotations such as highlights or sticky notes need to be applied to the document prior to submission into Workflow.



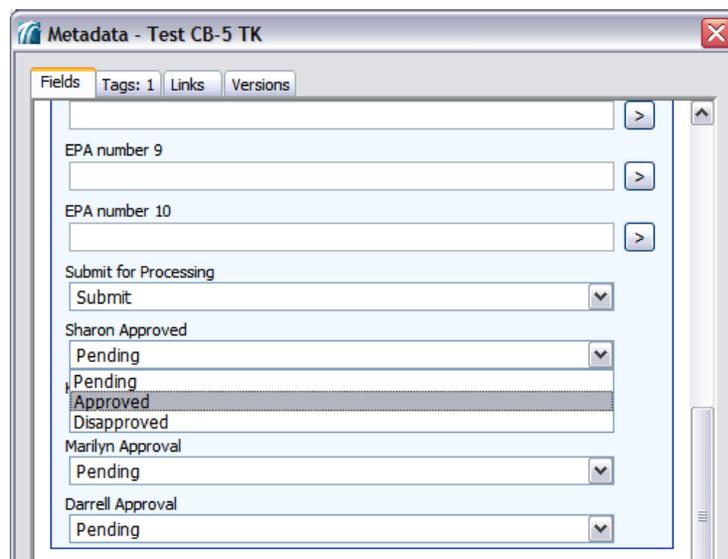
- The first event in the workflow is that the document is moved from the District's *Incoming Scans folder to the *Pending Approval folder. This change may not show up on your screen immediately. Press the F5 key on your keyboard to refresh the view of the *Incoming Scans folder. The document will no longer be there but will be in the *Pending Approval folder.



- Next, 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.

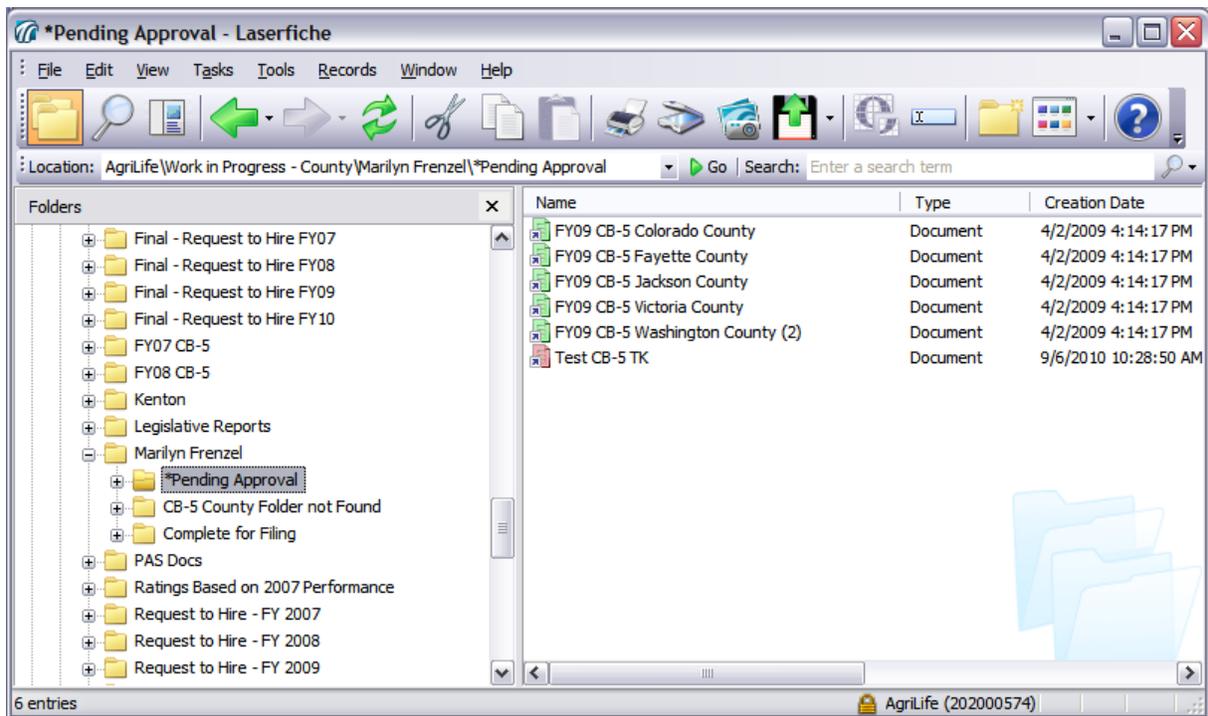


- The Budget Office representative will then review the document and, if applicable, move it forward in the workflow process. This is done by changing the respective template field value from Pending to Approved and selecting OK. As described earlier this can be done through viewing the field values or through the document viewer interface.

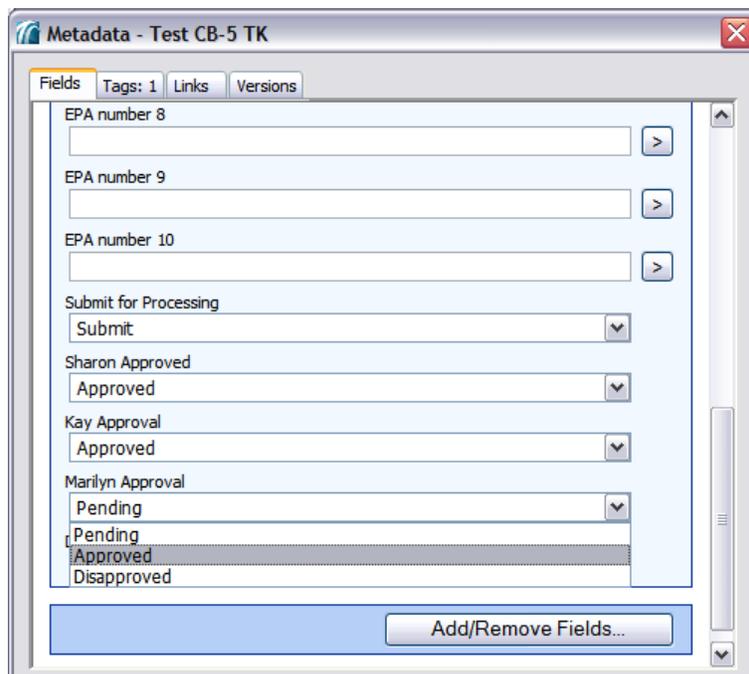


- This removes the shortcut from that folder, creates a shortcut to the document in the appropriate folder for another Budget Office representative and generates an e-mail notification to that representative. That representative again reviews and, if applicable, approves the document as described above.

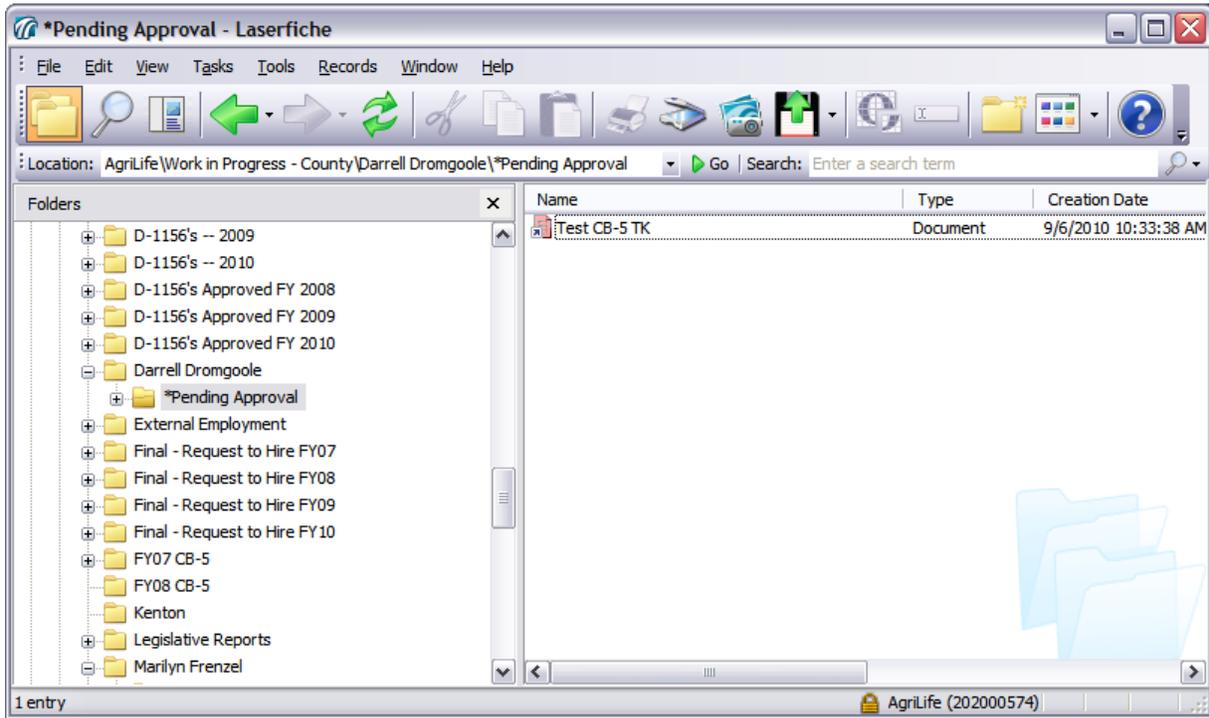
10. At that point the shortcut is removed from that representative's folder and creates a new shortcut in the appropriate folder for the Assistant to the Associate Director for County Programs and sends an e-mail notification to the Assistant.



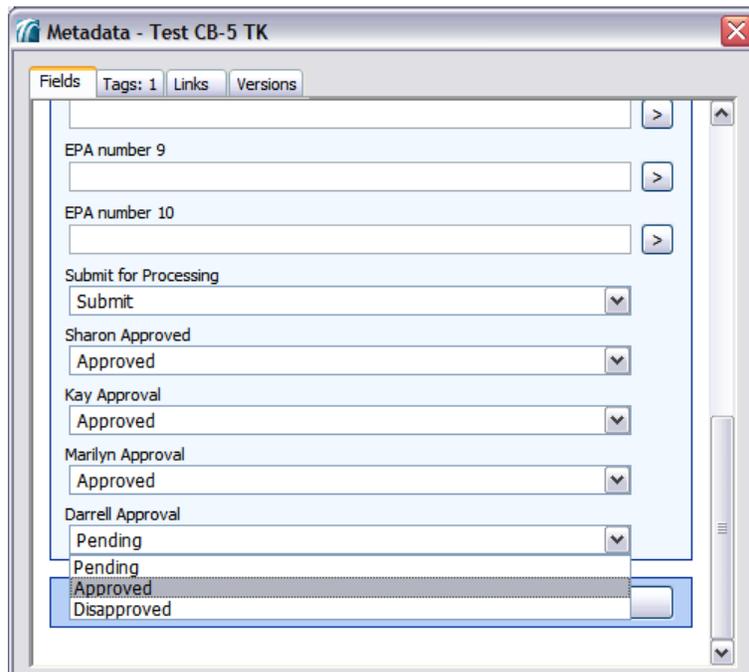
11. The Assistant then repeats the process of reviewing and, if applicable, approving the document to move it to the Associate Director for County Programs for final approval This is done by changing the appropriate template field value from Pending to Approved



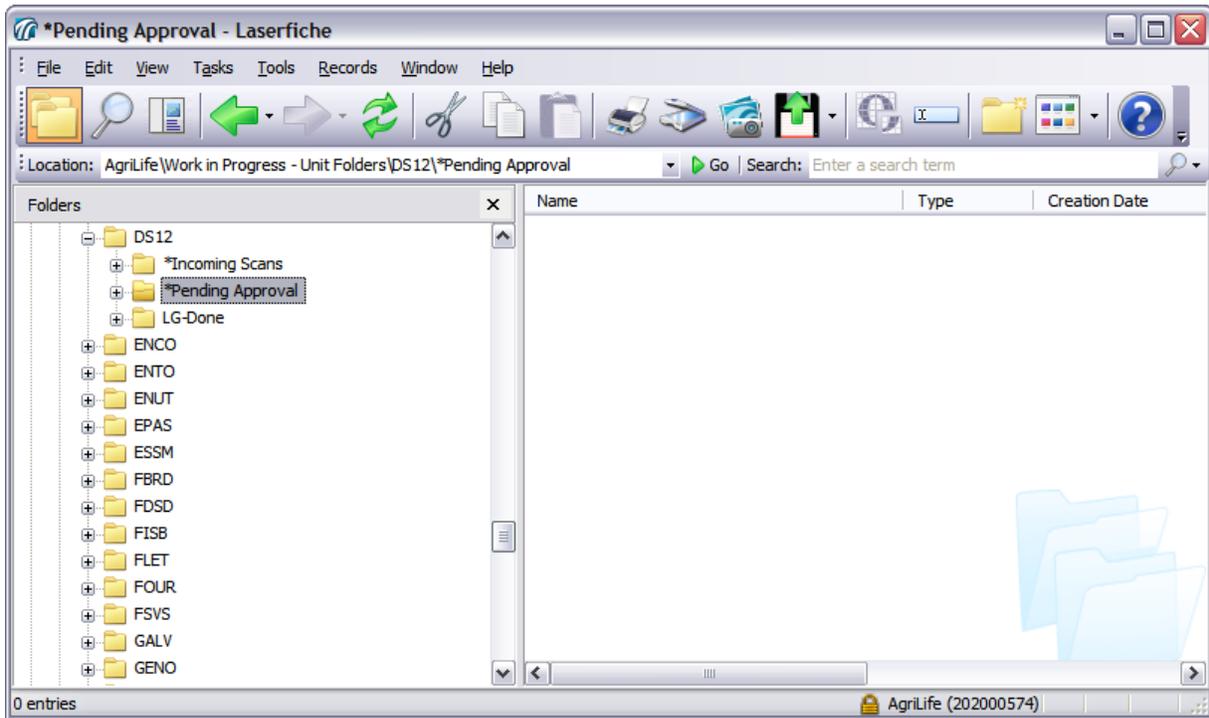
- The workflow removes the shortcut from the Assistant's folder and creates a shortcut in the folder for the Associate Director and sends an e-mail notification to the Associate Director.



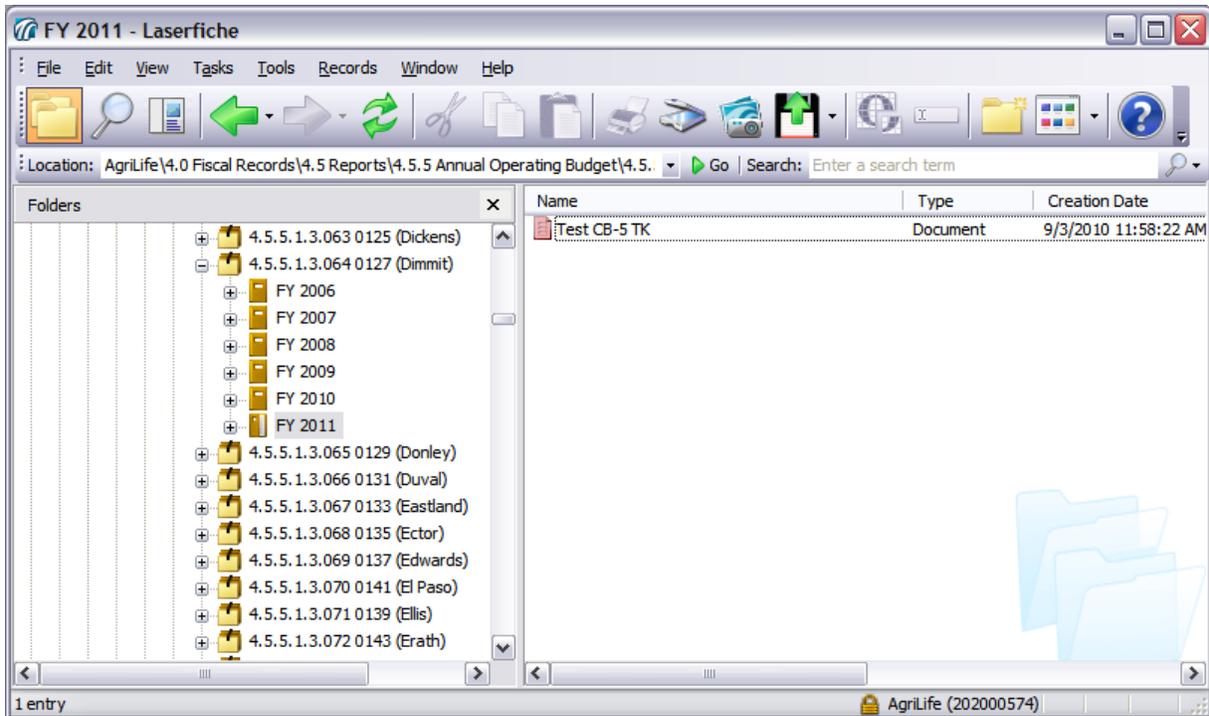
- When the Associate Director completes the approval process by changing the value of the appropriate template field from Pending to Approved, the workflow removes the shortcut from the Associate Director's folder.



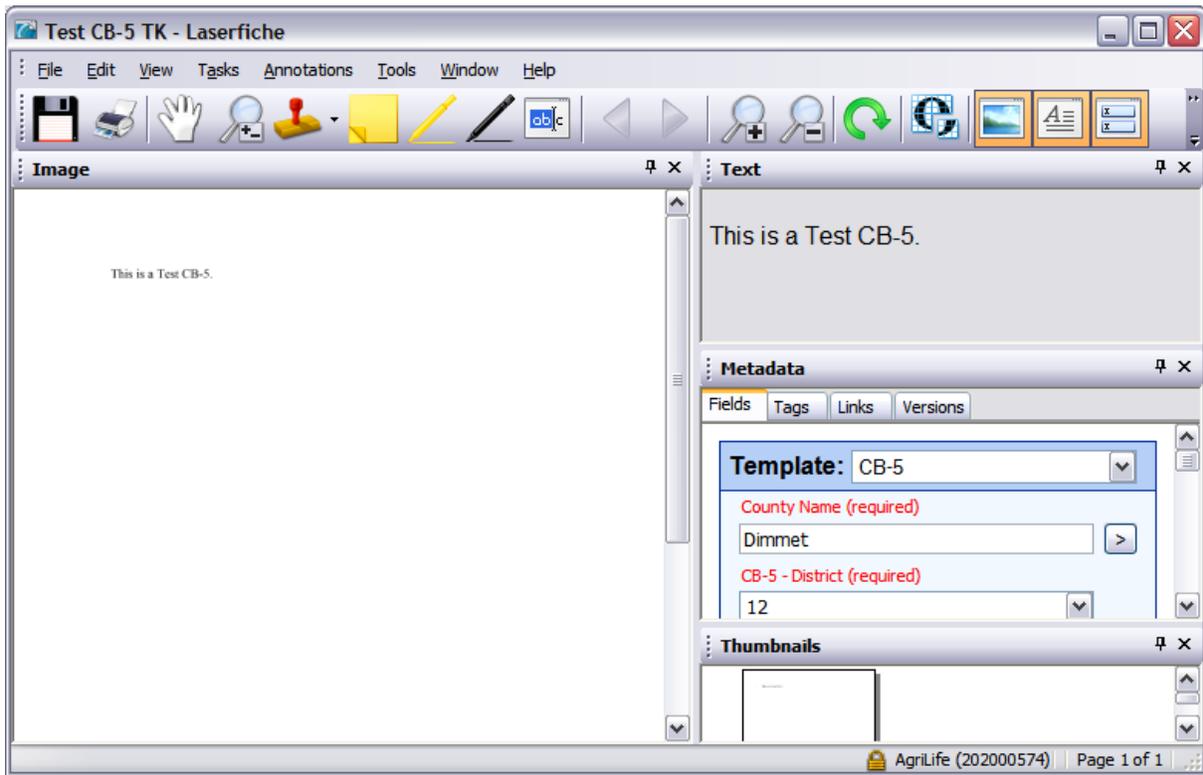
14. The original document is removed from originating District's Pending Approval Folder.



15. The original document is moved to the appropriate County's record series and Fiscal Year folder.



16. Please note that if the County name is misspelled, the workflow will not be able to file the document properly.



17. In such a case the document will be moved to the Assistant's CB-5 County Folder not Found folder and an e-mail notification will be sent to the Assistant so that the document can be moved to the appropriate folder manually.

