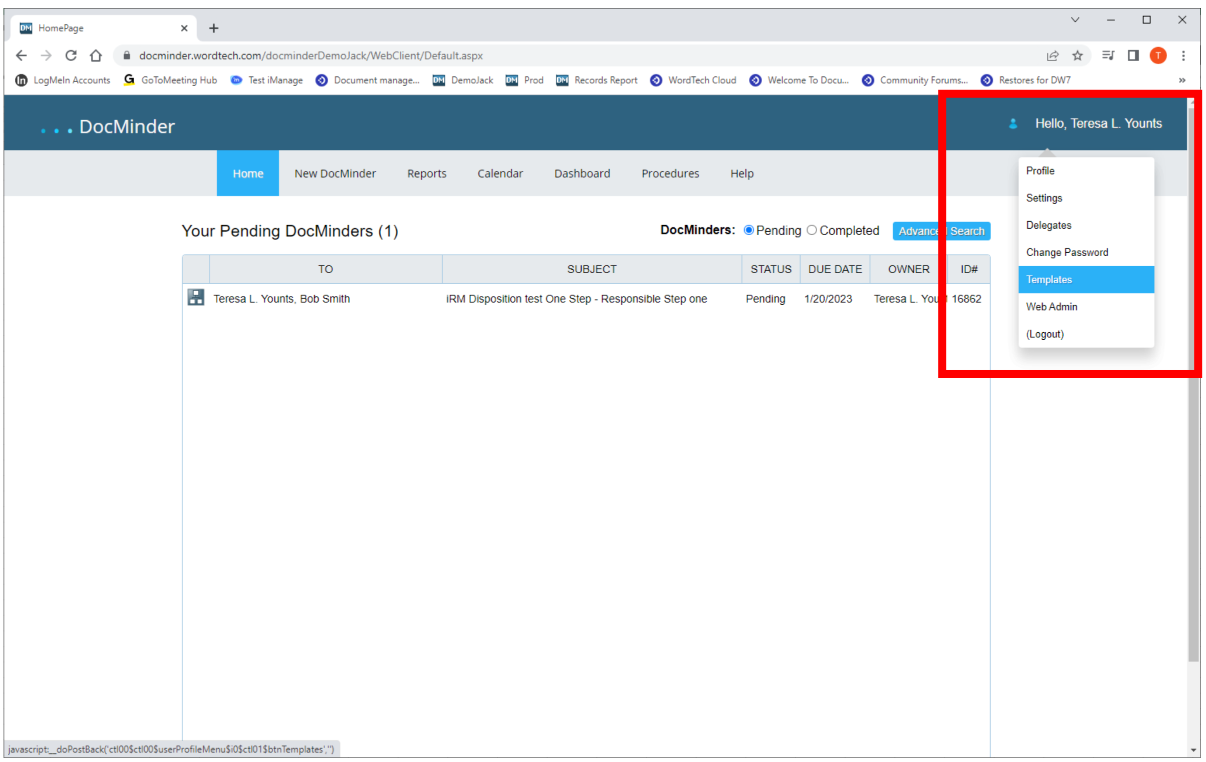
Disposition Manager Workflow Setup

Your DocMinder®/iRM Disposition Manager Process comes with two predefined workflow templates. The workflows created from the templates provide users access to the approval process for the disposition of records. These workflow templates need to be updated to fit into your environment.

At a minimum the templates must have user assignments made to send the workflows to the appropriate person(s). There are also Due Dates for each step in the workflow. The due dates should be adjusted to fit your environment's rules.

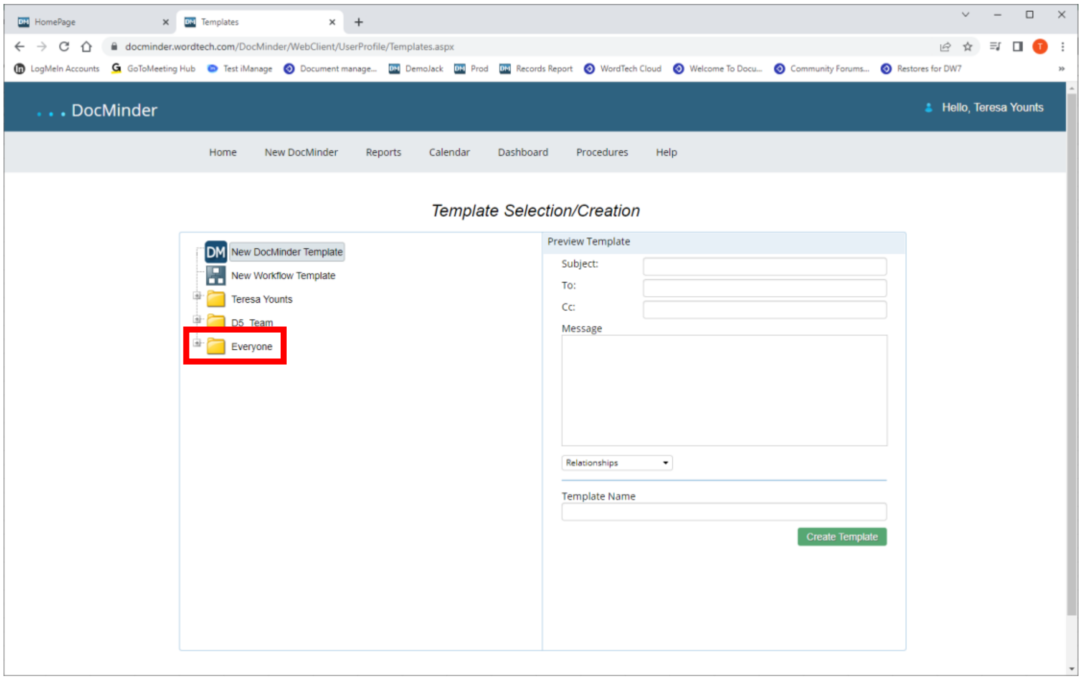
This guide is meant only to make minimum changes to the workflow templates. This will not walk through all available settings possible for a DocMinder® workflow template.

To access the workflow templates, bring up the DocMinder® program which is a web-based program. This is done using a URL provided to you. With the program open, click on the "Hello, username" in the upper right corner of the page. From the dropdown menu that appears, click on "Templates".

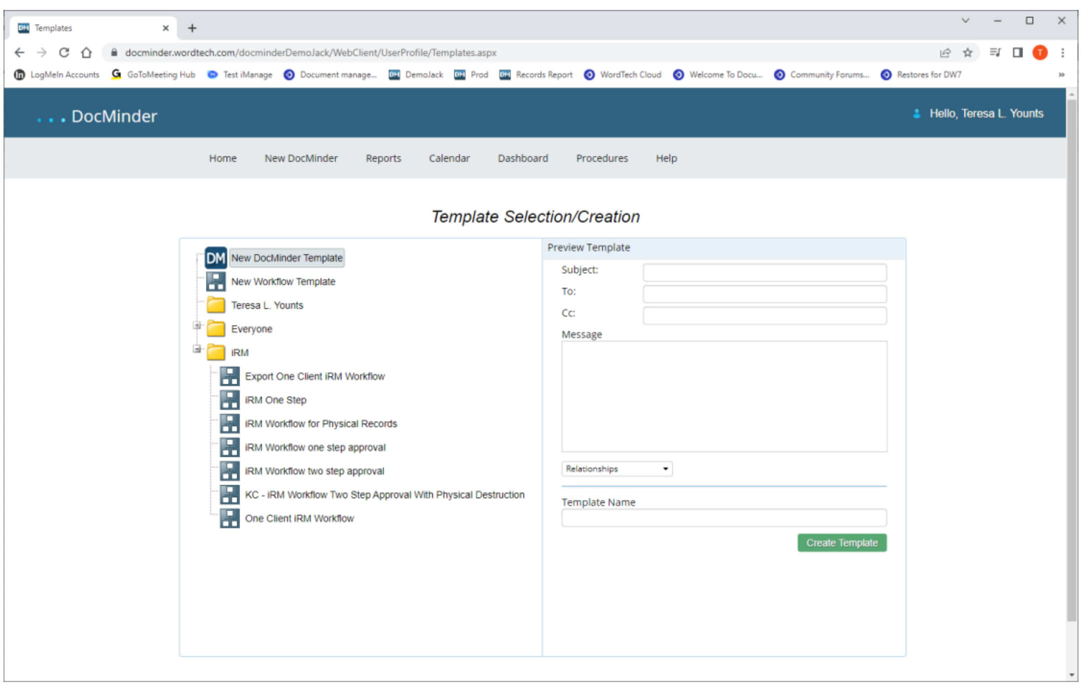


The “Template Selection/Creation” page opens.

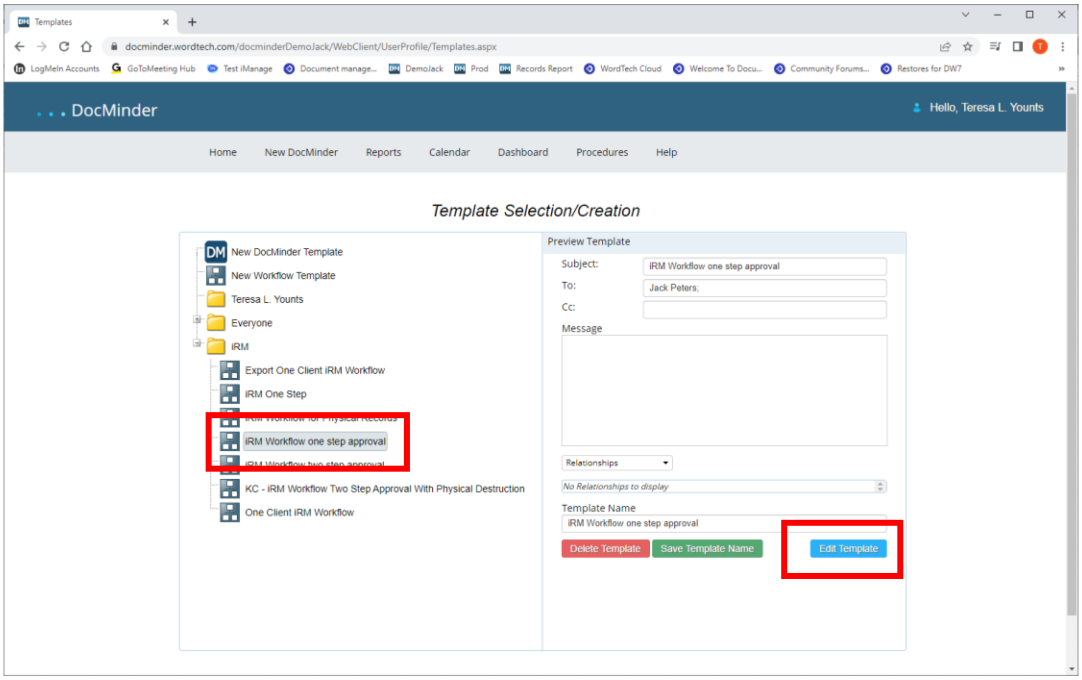
Hit the “+” sign in front of the group called “Everyone”.



A list of templates is displayed. In a newly installed system, you will see only two templates.

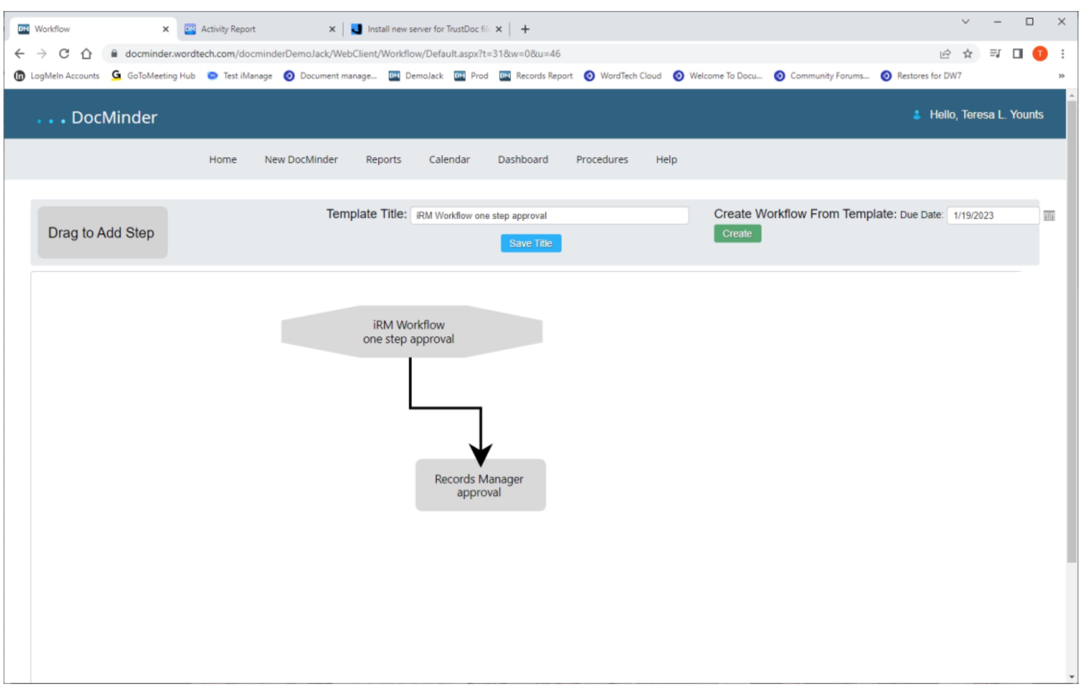


Click on the workflow template called “iRM Workflow one step approval”.



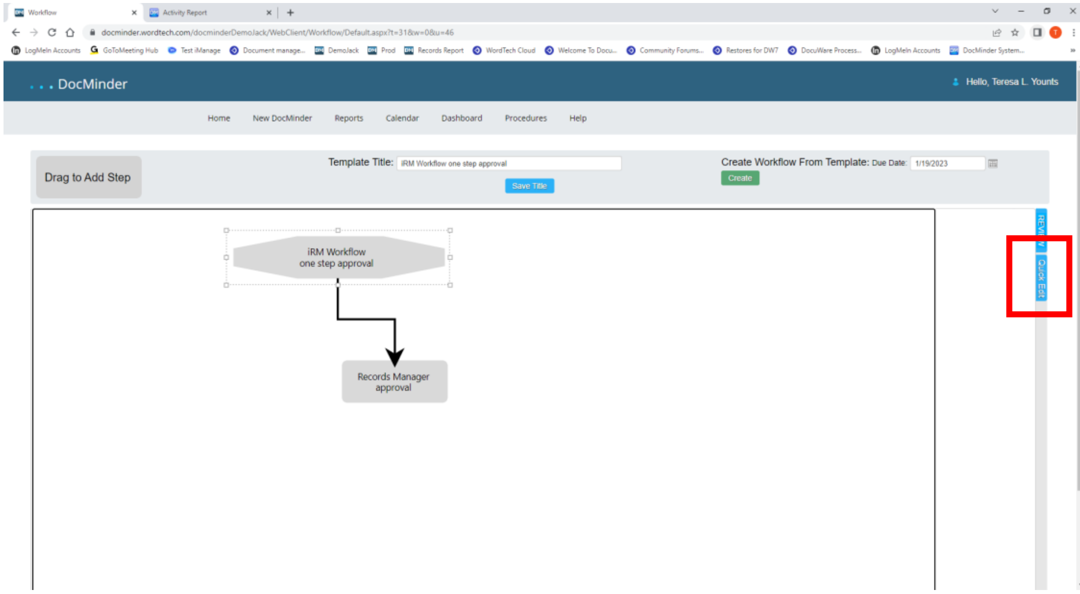
Once the template name is highlighted, click the blue “Edit template” button. The template page is opened.

There are two nodes that appear in the workflow designer. The diamond shaped node is what is called the Container for the workflow. It is not a step that defines work to be done but an administrative node for the person responsible for making sure workflows are completed in a timely manner.

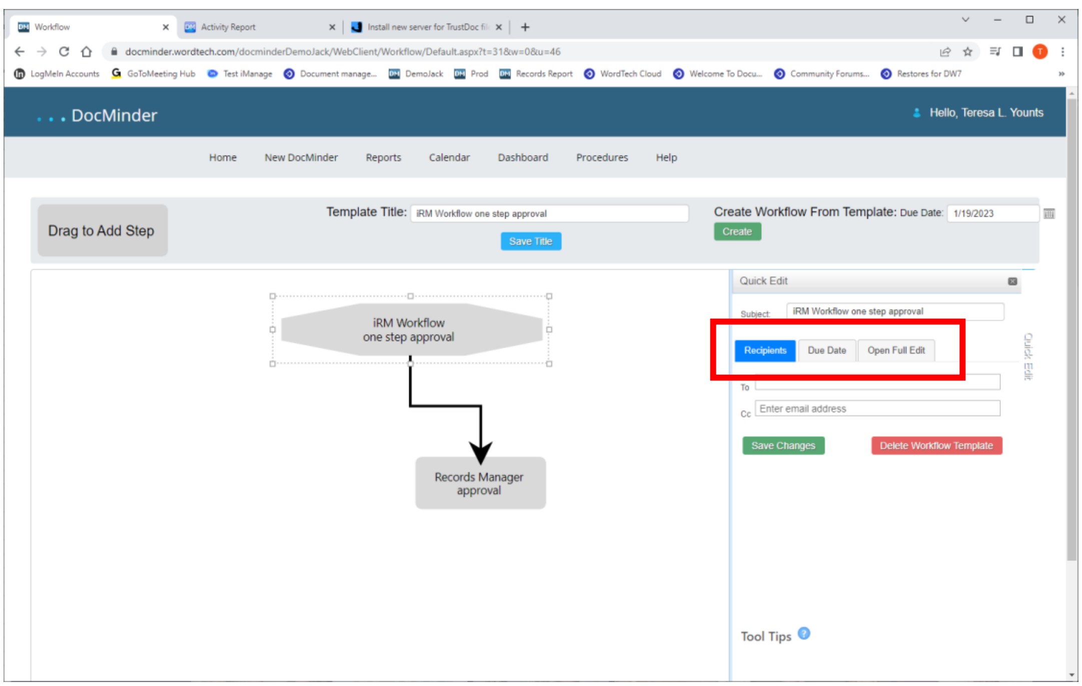


Click on the container node “iRM Workflow one step approval”.

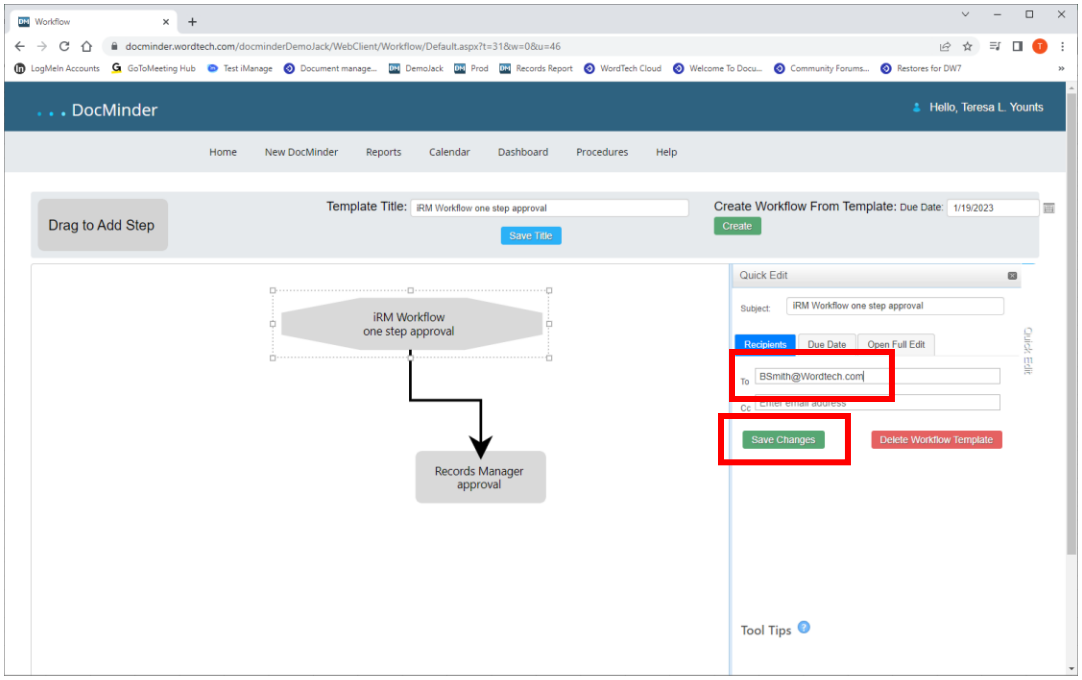
A “Quick Edit” button appears at the right of the page. Click that button.



A menu slides out on the right of the page. You will see three tabs. “Recipients”, “Due Date”, “Open Full Edit”. The “Recipients” tab should be highlighted by default.



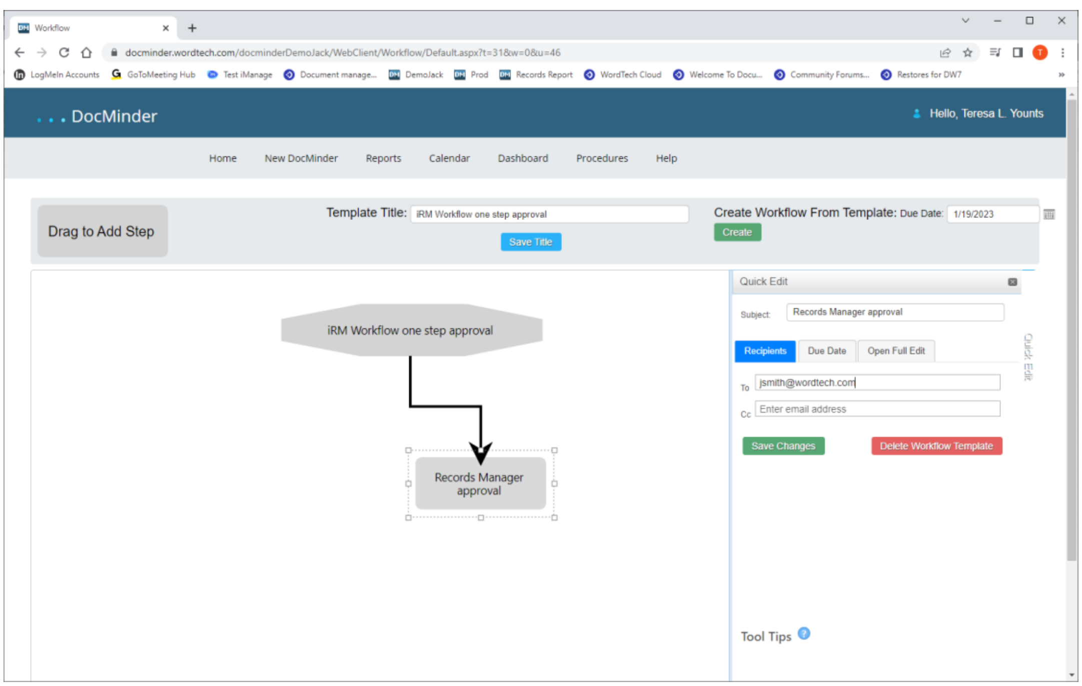
To assign a user to this node, type the email address of the person responsible for ensuring this workflow is completed in a timely manner in the “To” box. This must be a user that has been set up in the DocMinder® system.



Click “Save Changes”.

Now repeat this process for the “Records Manager approval” node. This node is a step in the workflow where someone must complete a task in order for the workflow to move on/complete.

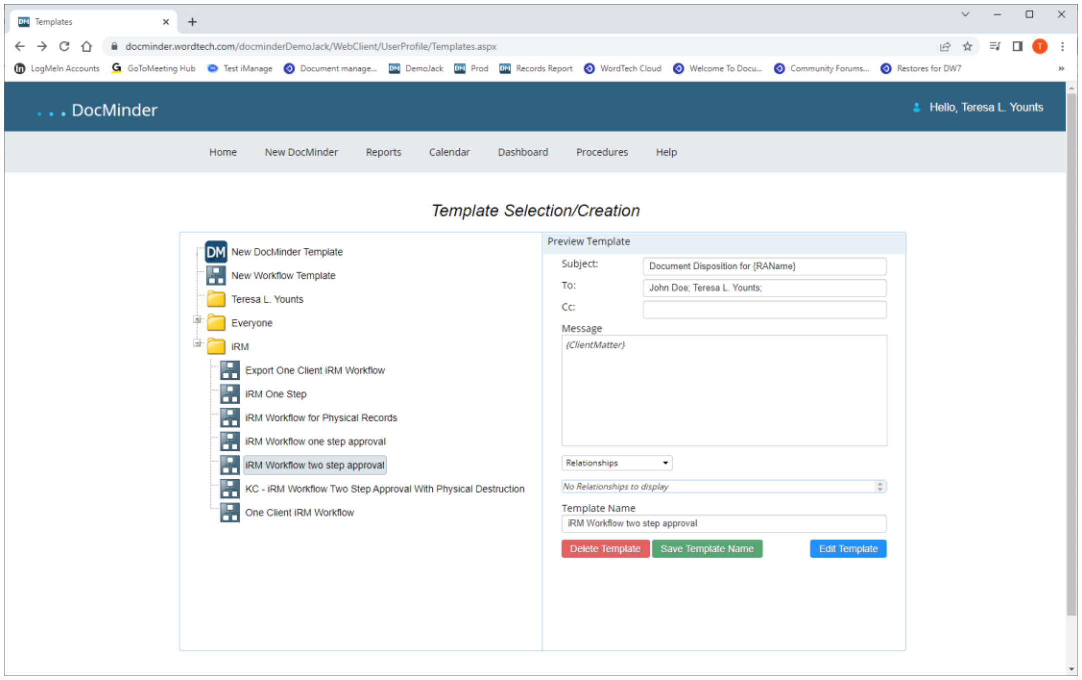
Highlight the node and enter a name in the “To” box. The user entered here will receive email notifications that will take them to the Approval process of the records. Click “Save changes”.



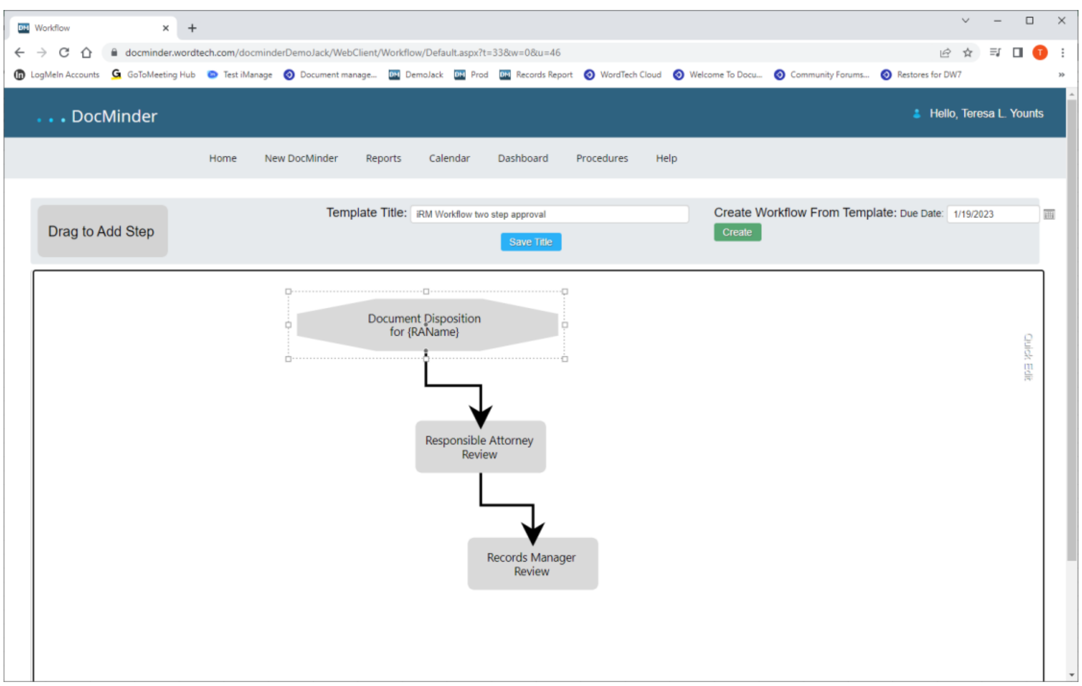
Now edit the “iRM Workflow two step approval” workflow template.

Access the Template page by using the dropdown menu under your username as described above~OR~ hit the back arrow on your browser to return to the “Template Selection/Creation” page.

Click the “iRM workflow two step approval” and click the blue “Edit” button.

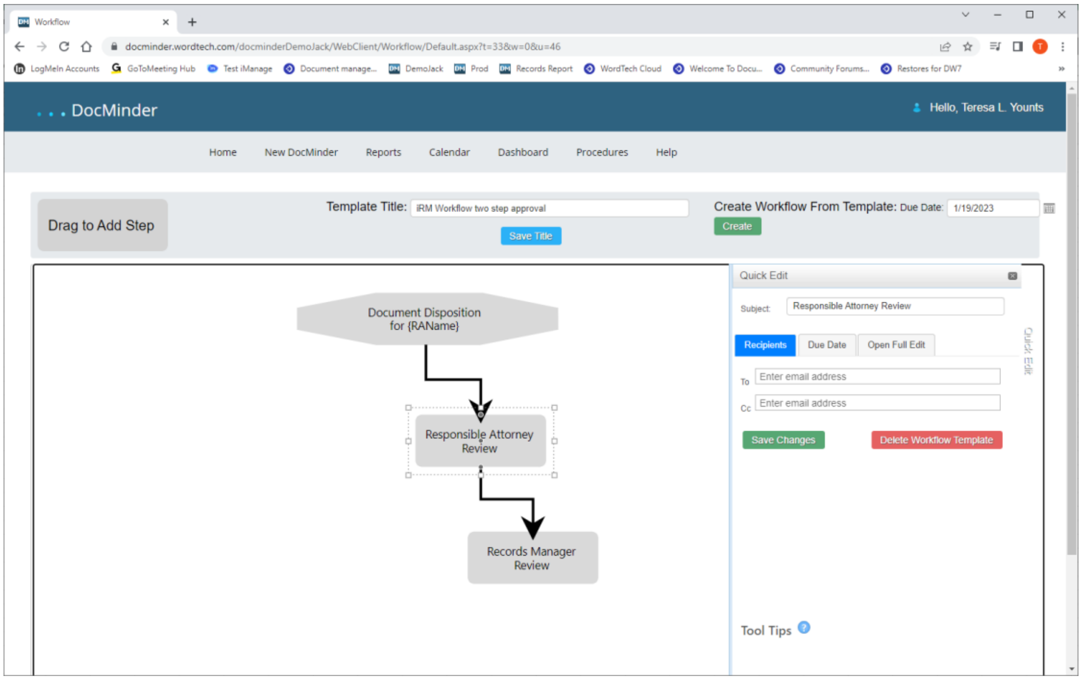


Click the container node called “Document Disposition for {RAName}”. Follow the same steps as described above for the container node.

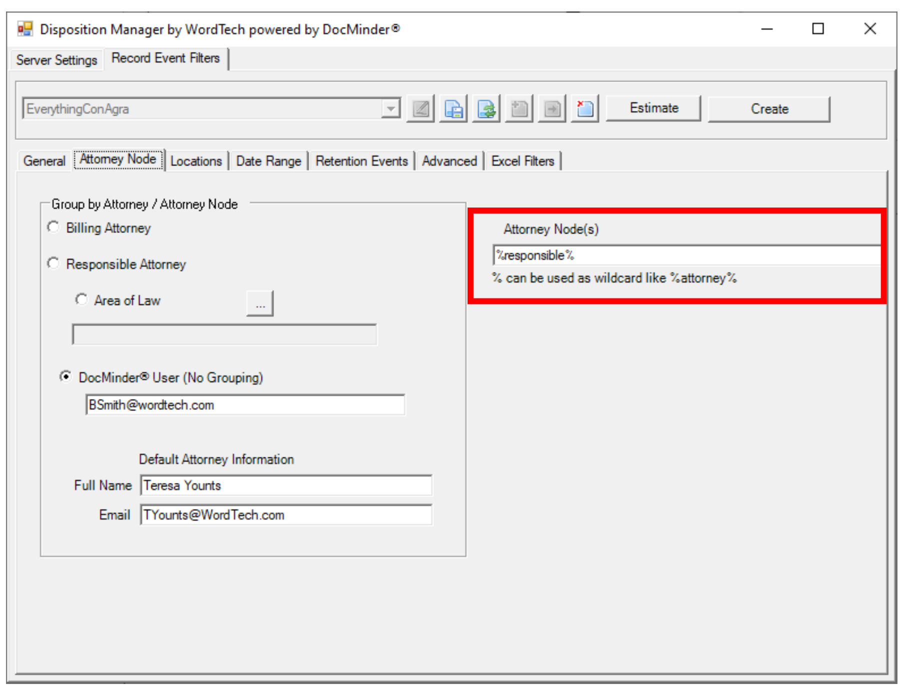


Click the “Responsible Attorney Review” node.

For this step, there is no need to assign a user if the Responsible Attorney node is used in the Disposition Manager console when the filters are defined. The user is assigned dynamically using Billing and Responsible Attorney information from iRM.



Disposition Manager Console

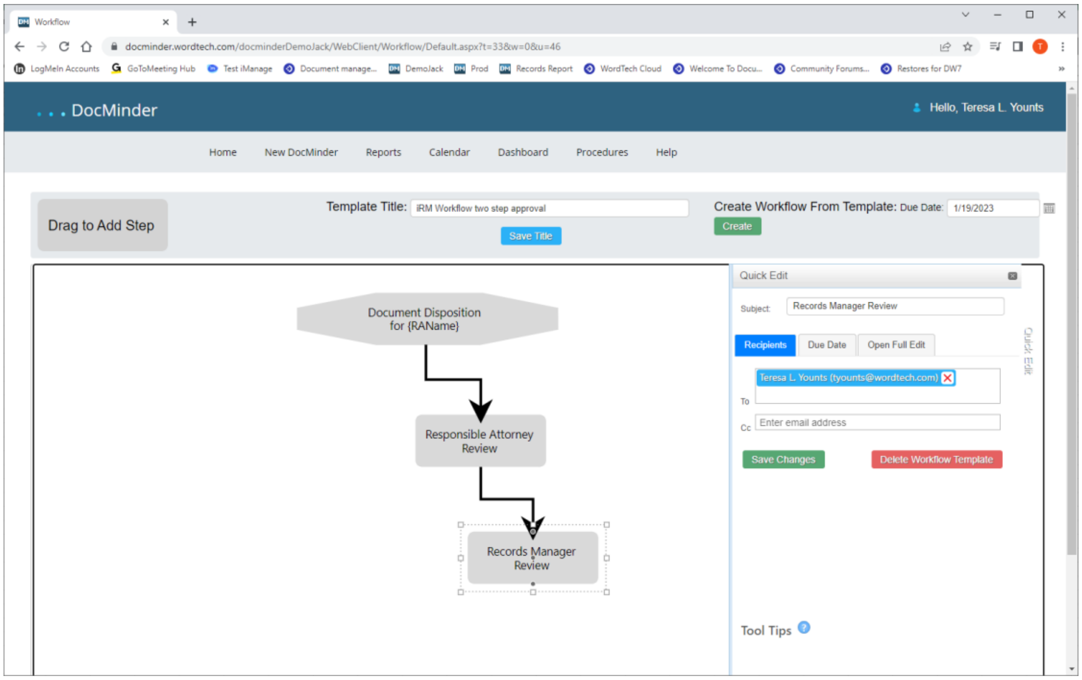


The term entered in the “Attorney Node(s) box here must match a word in the node name.

A user will be dynamically assigned to the “Responsible Attorney Review” node based on the choice made under the “Group by Attorney” section on the left.

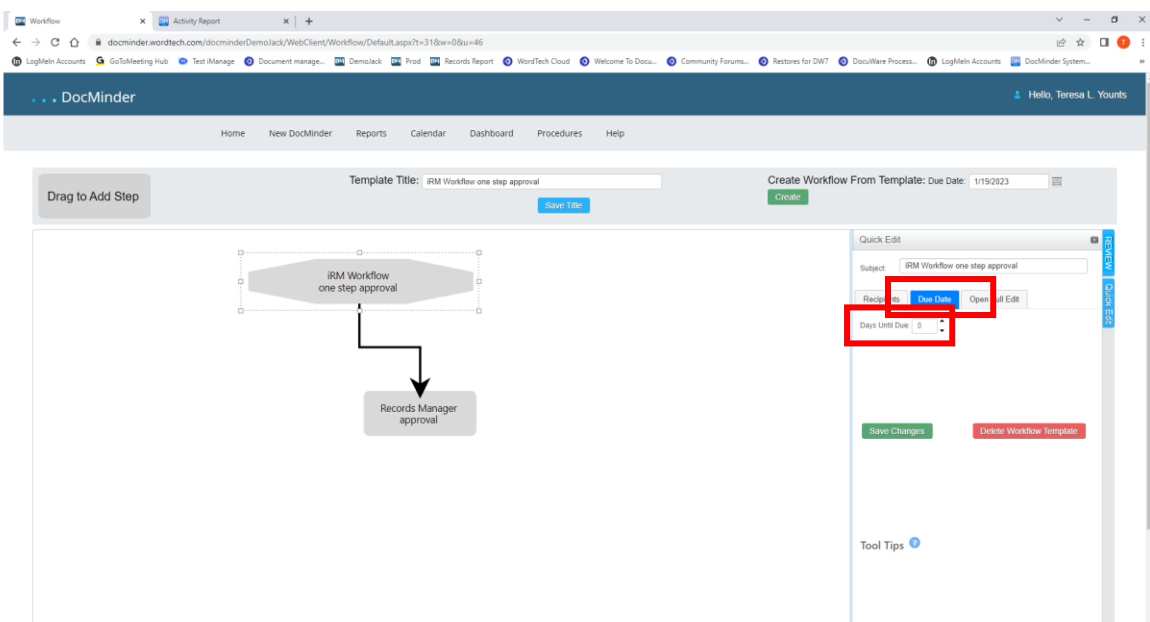
See the Disposition Manager Console documentation for more information.

Click the “Records Manager Review” node and assign a user on the “To” line. Click “Save Changes”.



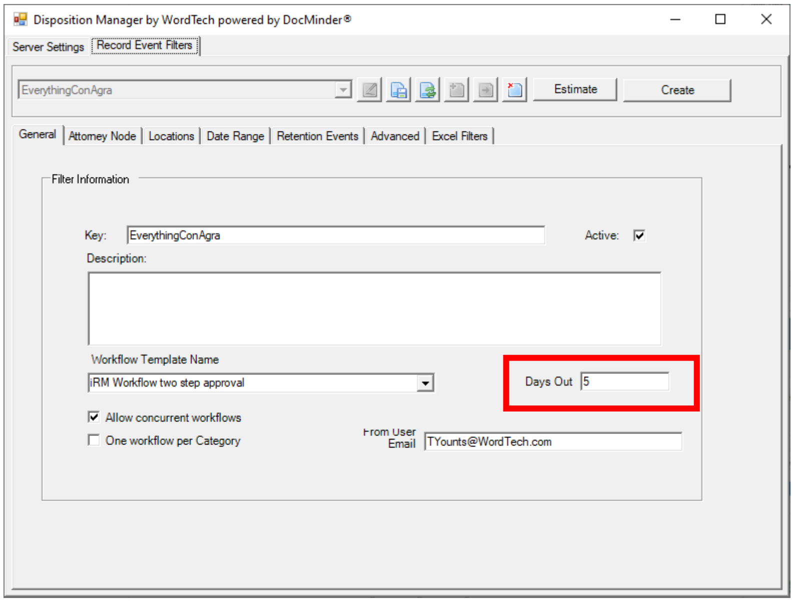
Configure Due Dates for iRM Workflow one step approval:

As described above, choose the “iRM Workflow one step approval” template to work with and click the “Quick Edit” button. Click the “Due Date” tab.



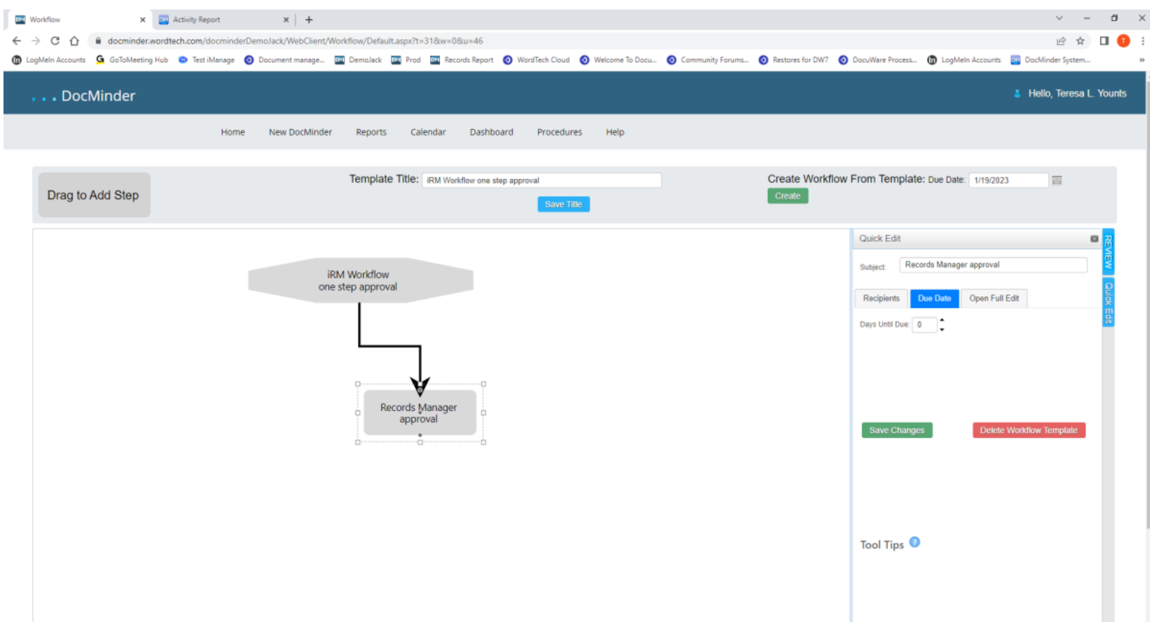
A “Days Until Due” box appears. For the predefined workflow templates, this node does not require a change here. The Due Date for this container node is defined in the Disposition Manager console when the filters are defined.

Disposition Manager Console:



The number of days entered in the "Days out" box in the console will dynamically assign the due date to the container node.

Click the "Records Manager approval" node.



The "Days Until Due" box is now active. Enter the number of days here the person assigned to this step/task has to complete their work. When this step is kicked off, the Due Date for this step will be calculated based on the Current Date plus the number of days entered here.

Click "Save Changes".

If a user does not complete their work by the Due Date, “This task is overdue” notifications will be generated. The notifications will be sent to the person assigned to this step as well as the person assigned to the workflow container node. These notifications can be adjusted.

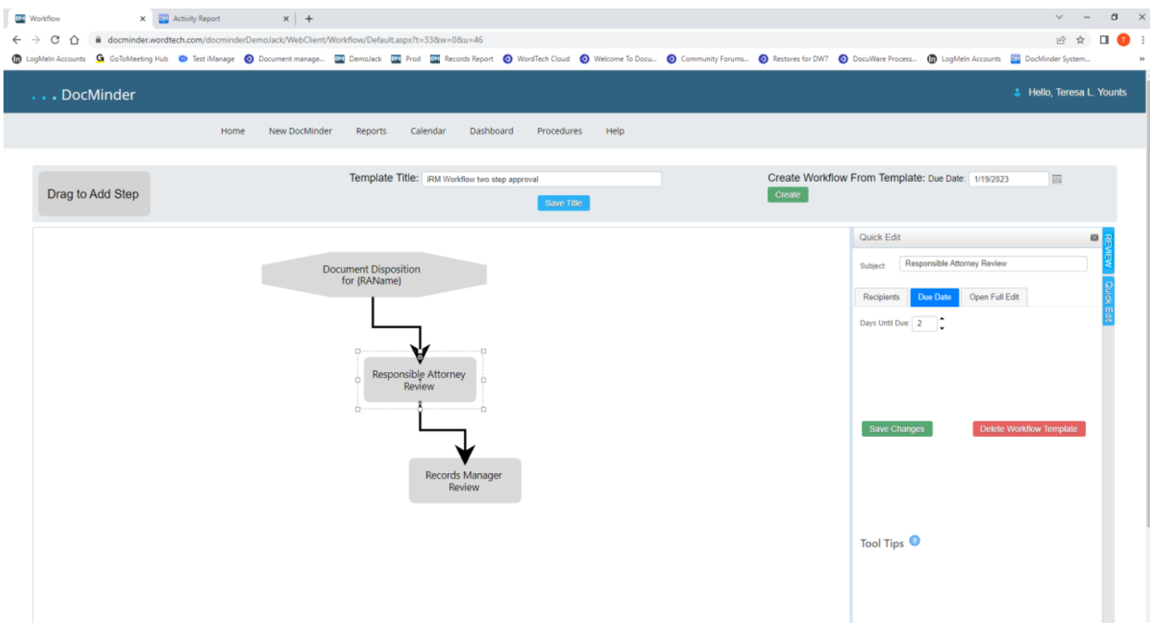
Configure Due Dates for iRM Workflow two step approval:

Choose the “iRM Workflow two step approval” template to work with and click the “Quick Edit” button.

Click the “Due Date” tab.

As with the one step approval workflow described above, the Container node of the workflow does not require any changes.

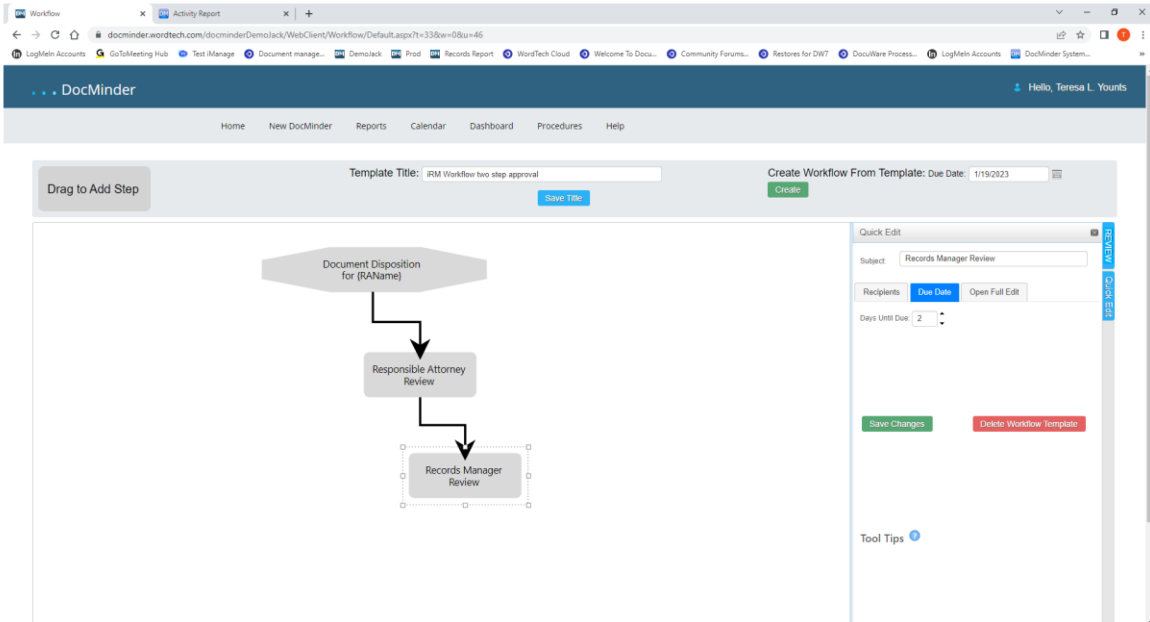
Click the “Responsible Attorney Review” node.



The “Days Until Due” box is now active. Enter the number of days here the person assigned to this step/task has to complete their work. When this step is kicked off, the Due Date for this step will be calculated based on the Current Date plus the number of days entered here.

If a user does not complete their work by the Due Date, “This task is overdue” notifications will be generated. The notifications will be sent to the person assigned to this step as well as the person assigned to the workflow container node. These notifications can be adjusted.

Click on the “Records Manager Review” node.



The “Days Until Due” box is now active. Enter the number of days here the person assigned to this step/task has to complete their work.

This step will be kicked off once the step before it, the “Responsible Attorney Review” step, is completed.

The Due Date for this step will be calculated based on the Date the previous step was completed plus the number of days entered here.

If a user does not complete their work by the Due Date, “This task is overdue” notifications will be generated. The notifications will be sent to the person assigned to this step as well as the person assigned to the workflow container node. These notifications can be adjusted.

Click “Save Changes”

There are many more settings that can be adjusted in the workflow templates. Things such as Notification settings, Escalations if workflow tasks become past due, Delegations for persons who are out of office, etc. This guide is meant to get you familiar with the Workflow Template editing.

Contact Word-Tech support for further questions.

Email: Support@WordTech.com