

## halFILE Workflow

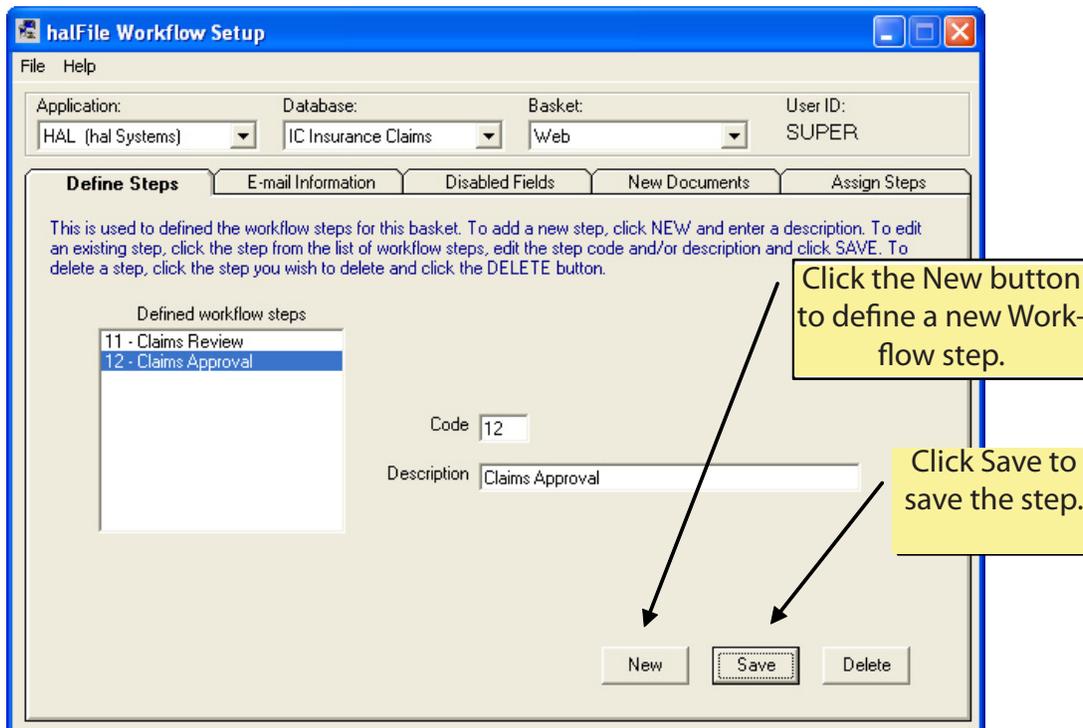
halFILE Workflow provides a way for documents to be routed from user to user through the use of a WorkFlow Basket. A predefined routing path for the document is set up for the Basket to prompt the users of documents in the basket with the next step of the workflow.

halFILE Workflow is totally encompassed within the halFILE product. While halFILE does have some links and hooks where external applications could be executed, halFILE WorkFlow deals with the flow of documents within halFILE. However, custom modules can be written to fit into the Workflow configuration and facilitate actions beyond halFILE.

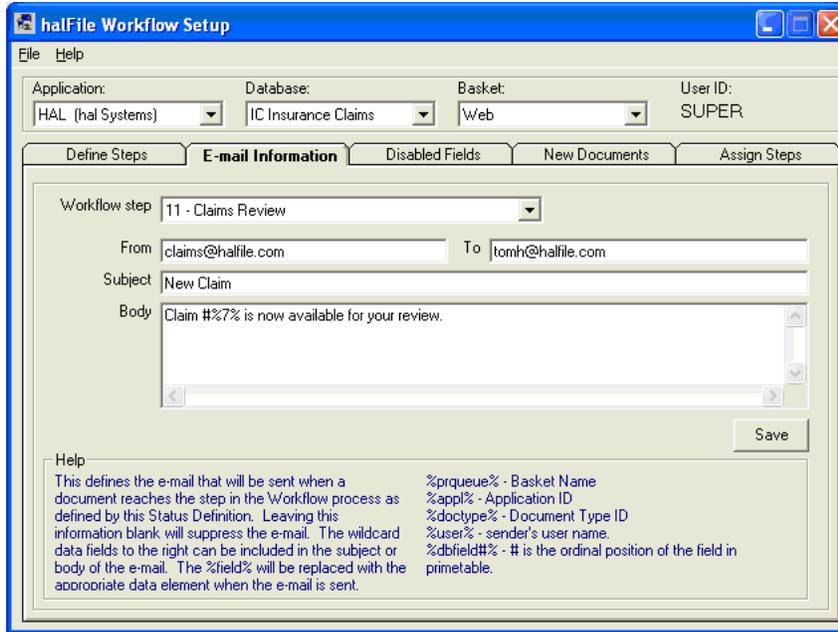
## Enabling Workflow

The Workflow features are enabled by creating a "workflow" basket. These types of baskets include user defined status indicators to define how the status of a document works and what users can see which documents. The process of setting up a Workflow basket is as follows:

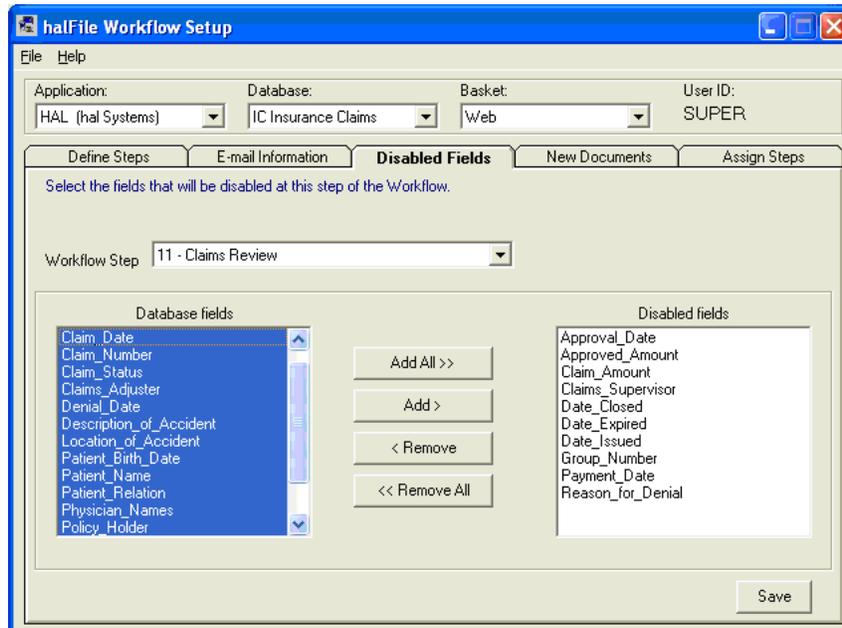
1. Go into the halFILE Administrator.
2. Define a basket for the database that you wish to perform the workflow using the File-Baskets menu.
3. Select the basket and click the Define Workflow button. This will open up the Workflow Setup module.
4. In the Workflow set up, first define the steps of the workflow by going to the Define Steps tab. Click the New button to define a new step and provide a description of the step.



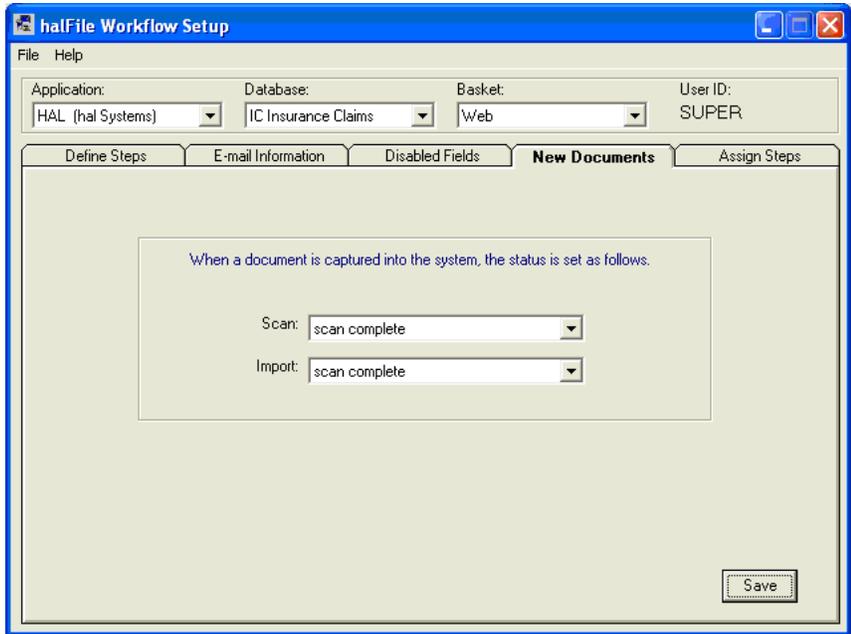
5. The second tab, E-mail Information, is used to set up e-mail alerts that can be sent to a user when the workflow status reaches a certain point.



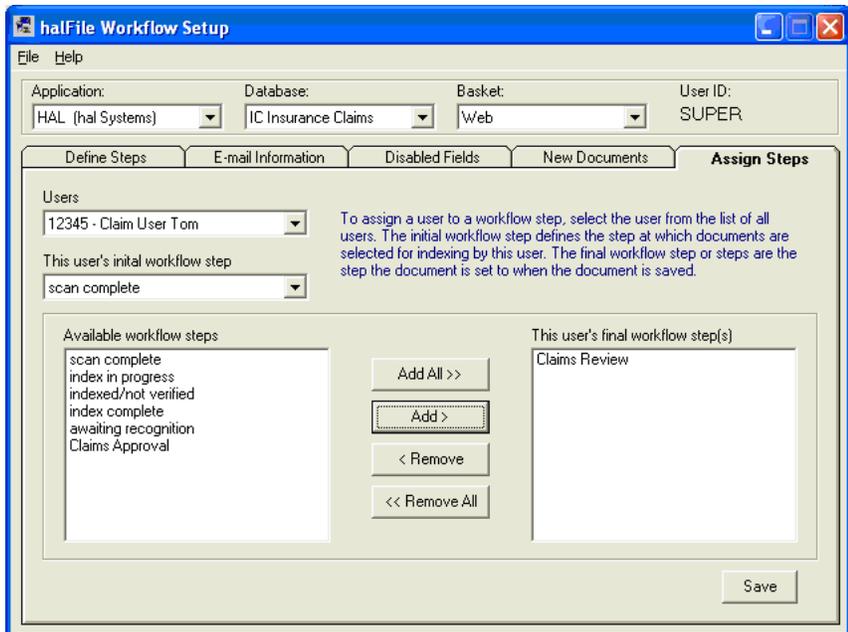
6. Fields can be disabled at any point of the Workflow process. For example, if you are setting up a Claims Review/Approval workflow, the reviewer may only be able to post basic claim information and should not be able to access the approval fields. This is set up using the Disabled Fields tab.



7. The New Documents tab is used to define the document status that will be used when a new document is introduced into the system via the scan or import module of halFILE.



8. The final step of the Workflow set up is to assign steps to users using the Assign Steps tab. Select a user from the drop-down list of users having access to this database. Select the initial workflow step that is used to identify the stage of the workflow that a document must be at in order to be selected for this user to index. Finally, select the final workflow step that will be set once the user saves the document in index. Multiple final steps can be selected if you wish the user to be able to make a decision on who should next receive the document.



Once Workflow routing has been defined for a basket, the workflow process will begin as documents are scanned or imported into a workflow basket. The following describes an example of a workflow process:

### Workflow Routing Example

James is the scan operator. When a new claim form comes in the mail, James scans it into the Workflow basket of the Claims database. By definition, the status is automatically set to scan-complete as defined on the New Documents tab of the Workflow Setup.

John is the user whose job it is to review new claims to ensure that all the information has been filled in properly. He selects the workflow basket in the Claims database and goes into Index. The system returns the first document having a status of scan-complete, since that is the initial workflow step for John, as defined on the Assign Steps tab. John is only able to key fields related to the Claim information. All the approval fields are greyed out because they were set up this way on the Disabled Fields tab. When John saves the document, he is given a choice of Assigned to Mary or Assigned to George. These are other workflow steps that were set up on the Define Steps tab and were selected as final steps for John on the Assign Steps tab.

Based on departmental procedures, John selects Assigned to Mary when saving the document, because Mary handles claims filed in Texas. An e-mail alert is automatically sent to Mary notifying her of the new claim.

Mary goes into the Workflow basket of the Claims database and is presented with the document because her initial step is defined as selecting those documents with a status of Assigned to Mary. Her index screen has the approval fields enabled. She reviews the claim and perhaps performs some research. She then fills in the appropriate fields and

saves the document. She is presented with the following choices: Awaiting Approval or Claim Denied. Mary selects "Awaiting approval". An e-mail alert is then sent to Dave, the Claims Department Manager.

Dave must give final approval to all claims. When he goes into the Workflow basket, he is presented with the Claim and can enter Final approval information. When he saves the document, the status is set to Awaiting Payment.

A custom module is written to scan the Workflow basket and for any approved claims, post a transaction to Quick Books and then set the status to Voucher Prepared.

Kathy in accounting reconciles checks that are prepared in Quick Books to the Approved Claims with a status of Voucher Prepared. After the check run, she goes into the Workflow basket and compares the actual check amount to the claim amount in halFILE. If correct, she sets the status to Paid and saves the record. The status is set to Index-Complete so the document will be archived and removed from the Workflow basket.

