



Goal: This document focuses entirely on enabling a user to use the Workflow Dashboard within EcoDox.

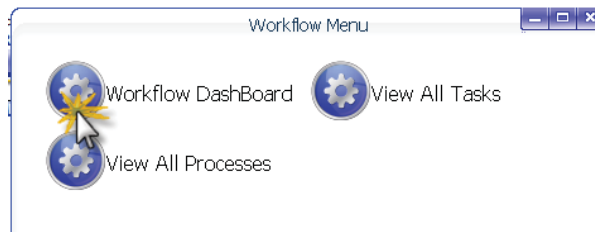
Complexity Level: Functional User

Prereq / Related Instructions: NONE



Step 1: Navigate to Workflow - Select the **Workflow** icon from the **Fisheye Navigation Board**.

Step 2: Domain Admin Menu- Upon selecting the WorkFlow icon, a pwindow will open within the browser. Select the **WorkFlow Dashboard** icon within the pwindow.



Step 3: Workflow Dashboard- The Workflow Dashboard is a multi-faceted tool for monitoring productivity and managing open tasks. The Dashboard is composed of four tools: **Calendar**, **Gauges**, the **Task List** (info view), and **Filters**.

View and Chart Filters

Checked Out Documents(1)

Overdue Threshold

Task Volume Threshold

Monthly Work Overview

Monthly Distribution

Dec, 2009

Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total
29 Tasks (0) Notify (0)	30 Tasks (0) Notify (0)	1 Tasks (0) Notify (0)	2 Tasks (0) Notify (0)	3 Tasks (0) Notify (0)	4 Tasks (0) Notify (0)	5 Tasks (0) Notify (0)	(0) items
6 Tasks (0) Notify (0)	7 Tasks (0) Notify (0)	8 Tasks (0) Notify (0)	9 Tasks (0) Notify (0)	10 Tasks (0) Notify (0)	11 Tasks (0) Notify (0)	12 Tasks (0) Notify (0)	(0) items
13 Tasks (0) Notify (0)	14 Tasks (1) Notify (0)	15 Tasks (0) Notify (0)	16 Tasks (0) Notify (0)	17 Tasks (0) Notify (0)	18 Tasks (0) Notify (0)	19 Tasks (0) Notify (0)	(1) items
20 Tasks (0) Notify (0)	21 Tasks (0) Notify (0)	22 Tasks (0) Notify (0)	23 Tasks (0) Notify (0)	24 Tasks (0) Notify (0)	25 Tasks (0) Notify (0)	26 Tasks (0) Notify (0)	(0) items
27 Tasks (0) Notify (0)	28 Tasks (0) Notify (0)	29 Tasks (0) Notify (0)	30 Tasks (0) Notify (0)	31 Tasks (0) Notify (0)	1 Tasks (0) Notify (0)	2 Tasks (0) Notify (0)	(0) items
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[Navigate to Newest Task](#) [List my exceptions \(0\)](#)
[Navigate to Oldest Task](#) [Clear Filters](#)

Important and Oldest Tasks

Name	Indexes	Task Times	Accept?
ROSS REP	HUMAN RESOURCES EMPLOYEE	Start Time 12/14/09 Timeout Time 12/16/09	Accept?2 Accept and View??
	LAST NAME: EMPLOYEE FIRST NAME: TEST EMPL ID: 123 SSN: MAIDEN NAME: DATE: 12/1/2009 DOC TYPE: TAGS:		

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How To: Using the Workflow Dashboard



Dashboard Calendar- The **Calendar** provides a quick look at productivity, allowing you to assess the status of your open tasks.

Dec, 2009

Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total
29 Tasks (0) Notify (0)	30 Tasks (0) Notify (0)	1 Tasks (0) Notify (0)	2 Tasks (0) Notify (0)	3 Tasks (0) Notify (0)	4 Tasks (0) Notify (0)	5 Tasks (0) Notify (0)	(0) items
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Click the single arrow to move by month and the double arrow to move by year.

Calendar: Weekly Task Charts – Select the Bar Graph Icon next to the desired week to view visual displays of productivity and task distribution for the week.

Dec, 2009

Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total
29 Tasks (0) Notify (0)	30 Tasks (0) Notify (0)	1 Tasks (0) Notify (0)	2 Tasks (0) Notify (0)	3 Tasks (0) Notify (0)	4 Tasks (0) Notify (0)	5 Tasks (0) Notify (0)	(0) items
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Click the Bar Graph Icon to display weekly task charts.



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Filters: Filter by Doc Class – Select the Filter by Doc Class Icon. Select the Doc Class from the resulting Pick List. The filter is applied to the Calendar and the Task Lists.

Routing>Dashboard
My Routing Tasks Dashboard

View and Chart Filters



Filters: Filter by Group – Select the Filter by Group Icon (the single person). Select the Group from the resulting Pick List. The filter is applied to Calendar and Task List.

Routing>Dashboard
My Routing Tasks Dashboard

View and Chart Filters



Filters: Filter by User – Select the Filter by User. Select the User from the resulting Pick List. The filter is applied to the Calendar and Task Lists.

Routing>Dashboard
My Routing Tasks Dashboard

View and Chart Filters



Filters: Clear Filters – Select the Clear Filters Icon to clear any filters applied to the Calendar and Task List.

Routing>Dashboard
My Routing Tasks Dashboard

View and Chart Filters



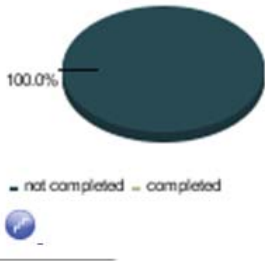


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Monthly Work Overview



Monthly Distribution



Gauges: Threshold Indicators

– The threshold indicator gauges provide visual cues for managing your assigned tasks. Green is low, red is high.

Overdue Threshold



Task Volume Threshold



Gauges: Monthly Charts

– The Monthly charts are useful tools for measuring monthly productivity. The charts provide visual support for percentage of completed tasks and task distribution. Select a pie chart to view the expanded version.

Task List – The task list displays open tasks based on the filters set. If filters are cleared, the task list displays tasks for your User Group. The task list is a handy way to accept and work on open tasks.

Important and Oldest Tasks

Name	Indexes	Task Times	Accept?
ROSS REP	<ul style="list-style-type: none"> HUMAN RESOURCES LAST NAME: EMPLOYEE FIRST NAME: TEST EMPL ID: 123 SSN: MAIDEN NAME: DATE: 12/1/2009 DOC TYPE: TAGS: 	Start Time 12/14/09 Timeout Time 12/16/09	Accept?? Accept and View??

Complete!!!

