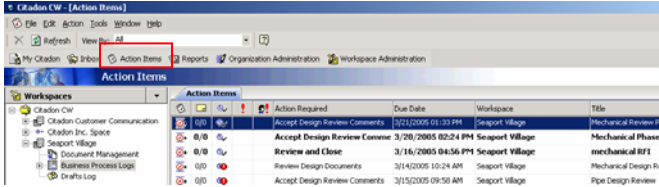





## Action Items

When a business process instance is created and sent out, it will appear on the recipient's Action Item list.

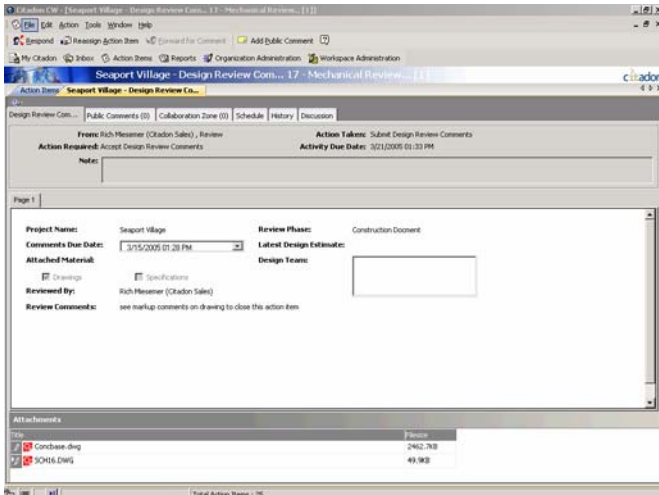


Action Items are notifications of Business Process Instances, where your action is required as a participant in the Business Process, either as the main participant (Ball-in-Court) , to comment , or to respond to an Item .

Each entry in the Action Item list contains information on an action item's priority, state, and status, as well as information about the sender, workspace, comments received, etc.


### Opening an Action Item

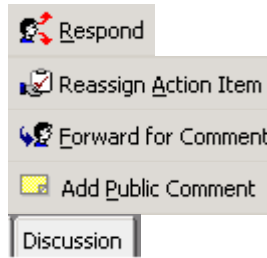
To open an Action Item, double-click on the item in the Action Item list. Right-click and Open, or File->Open will also open the Action item. The recipient of the action item will be able to view the form designed for that node in the business process.



The view form contains all the pertinent information about this instance, including current status and all attached forms. Because no action has been selected for this item, none of the fields in the view form are active. However, attachments can be viewed and downloaded via right-click.

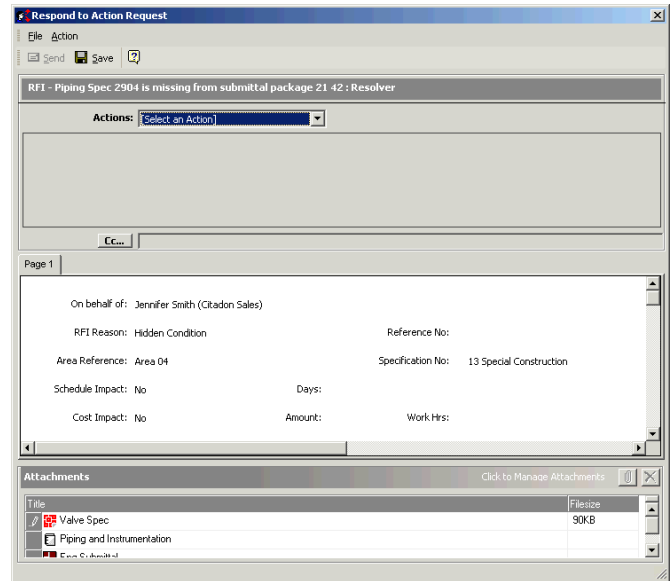
If the action item was sent to a group, then one person must accept the action item to process it. If this is the case then one button will appear on the secondary menu.

By clicking the  button, the recipient takes ownership of this action item and may proceed. Once a user has accepted the action item, or if the item was sent to an individual, then five actions are available from the secondary menu and Discussion tab:



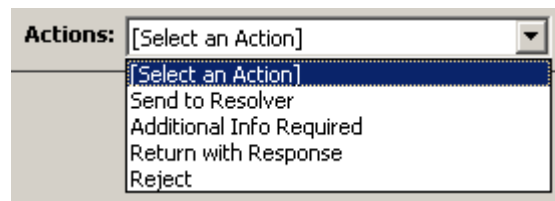
- Respond to the action item (normal process)
- Reassign the item (used if the recipient cannot act on the item)
- Forward for Comment – invite other users to collaborate
- Add Public Comment – allows the user to post a comment viewable by anyone that can view this instance
- Start a threaded discussion

### Responding to an Action Item





Clicking the button opens the edit form on the Action Item. The fields on the form are now editable


1. Select an Action from the pulldown. The actions presented are dependent on the setup chosen, and the particular step in the process represented by this action item. In this example, there are four actions:

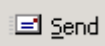


- Send to Resolver** – send item to the next person (normal process)
- Additional Info Required** – return to creator with request for more information
- Return with Response** – return to creator with response to issue
- Reject** – sends item to Closed status with reason for rejection

2. Click the  button and select the desired recipient. Click  to send a copy of the response form to another user. This user will not have any other access to the business process.

3. Enter the appropriate information in the edit form fields.

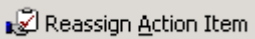
Additional attachments may be added by clicking the  button.

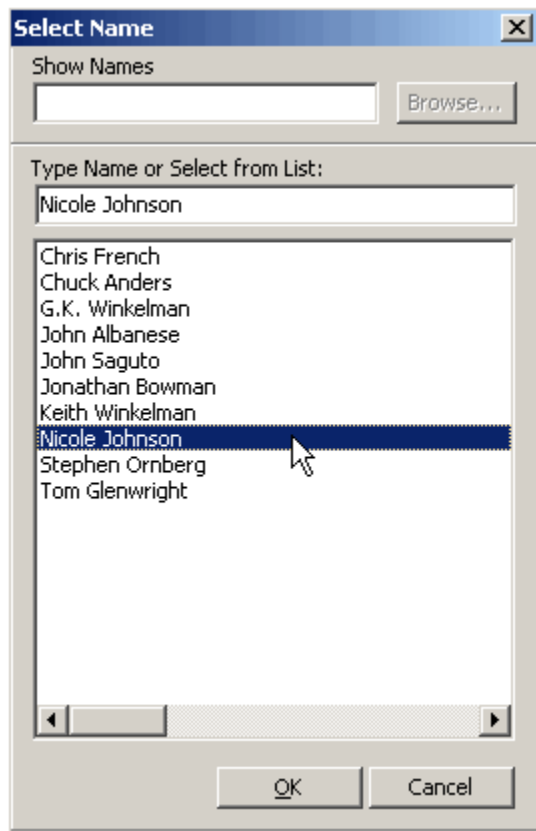
4. Click  to send the item on to the next recipient.

When an action item is sent to a recipient, it will disappear from the sender's Action Item list, and its history will be updated to reflect the date and time the action was taken.

## Reassigning an Action Item

If the action item cannot be processed by the recipient, or was sent in error, the action item can be reassigned to another user. For this to happen, the business process setup must have defined the set of users to whom this instance may be reassigned.

Click  on the secondary menu to reassign an action item.



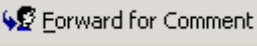
The 'Select Name' dialog box features a 'Show Names' field with a 'Browse...' button. Below it is a list of names: Chris French, Chuck Anders, G.K. Winkelman, John Albanese, John Saguto, Jonathan Bowman, Keith Winkelman, Nicole Johnson (highlighted), Stephen Ornberg, and Tom Glenwright. At the bottom are 'OK' and 'Cancel' buttons.

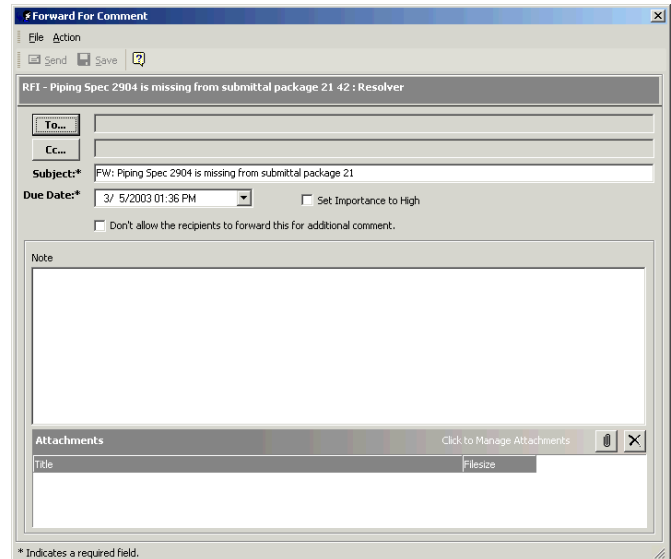
Select the individual to whom the item will be reassigned from the list of users presented and then click **OK**. The item will now appear in that user's Action Item list.

## Forward for Comment (Collaboration)

If a user needs additional input before the business process item can be completed, he or she may choose to forward the item to an additional group of people for comment. Forwarding for Comment


must be enabled in the business process setup for this feature to be enabled.

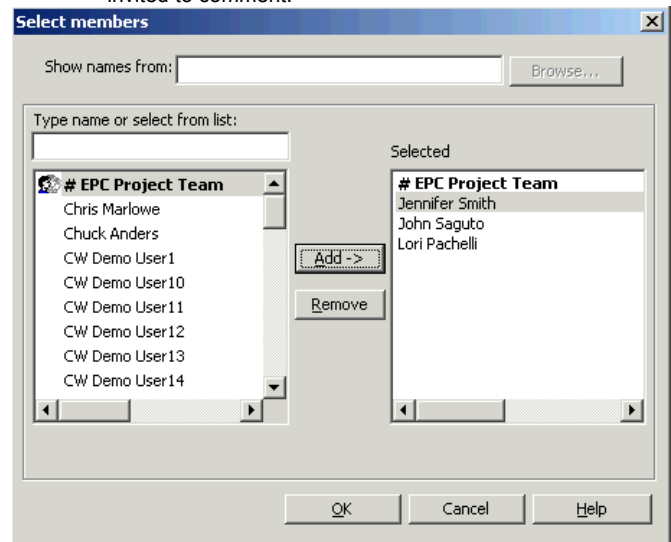
1. Click on the  button on the secondary menu to invite comments from other users.



The 'Forward For Comment' dialog box includes fields for 'To...', 'CC...', 'Subject:\*' (with value 'FW: Piping Spec 2904 is missing from submittal package 21'), and 'Due Date:\*' (with value '3/ 5/2003 01:36 PM'). There is a checkbox for 'Set Importance to High' and another for 'Don't allow the recipients to forward this for additional comment.'. A 'Note' text area is present, along with an 'Attachments' section with a 'Click to Manage Attachments' button and a 'Filesize' indicator. A footer note states '\* Indicates a required field.'

An edit form is presented that is similar to the edit form for the business process item.

2. Click the  button and then select the users to be invited to comment.




The 'Select members' dialog box has a 'Show names from:' field with a 'Browse...' button. It features two lists: 'Type name or select from list:' containing '# EPC Project Team' and various demo users, and 'Selected' containing 'Jennifer Smith', 'John Saguto', and 'Lori Pachelli'. 'Add ->' and 'Remove' buttons are between the lists. 'OK', 'Cancel', and 'Help' buttons are at the bottom.

Any user or group that is assigned to this project can be invited to comment, whether or not they have access to this particular business process.

3. Adjust the Subject field and the Due Date, if necessary. Set the Importance to high, if desired.
4. If this invitation to comment is to remain with the original list of invitees, then click the box preventing further forwarding as shown below.


- In the Note field, describe the issue and the requested comments. Attach any necessary documents.

- When the form is complete, click  to send the item to the invitees. This invitation to comment will show up as an Action item in their list.

### Responding to an Invitation to Comment


|     | Action Required       | Due Date            | Workspace                | Title                      |
|-----|-----------------------|---------------------|--------------------------|----------------------------|
| 0/0 | Release to the Closer | 11/12/2002 10:05 AM | DMJM+Harris Test Project | Contract Edit              |
| 1/1 | Close the Process     | 11/3/2002 10:14 AM  | DMJM+Harris Test Project | Obstruction at Manhole #4: |
| 0/0 | Comment               | 3/7/2003 01:35 PM   | EPC Project              | Piping Spec 2904 is mis    |
| 0/0 | Review and Approve    | 2/27/2003 12:52 PM  | CW Training Space        | Fourth Item                |

- Double-click on the action item to open it.

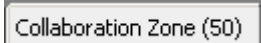
- Click on  to respond to the invitation to comment.

- Enter the desired response in the **Comment** field. Attach any desired documents to the response. If the user has no response, **No Comment** can be checked.

Note: Checking **No Comment** will delete any comments and attachments entered.

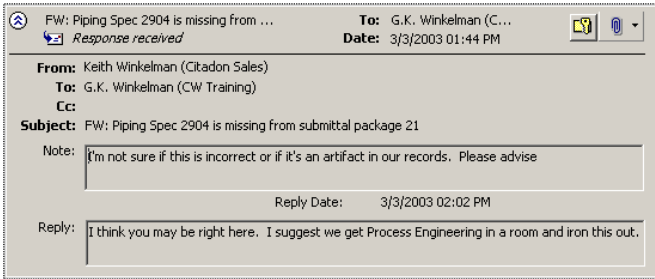
- When the form is complete, click  to send the response back to the inviter. These comments will be visible to anyone invited to comment until that user completes his or her comments.

### Processing Invited Comments

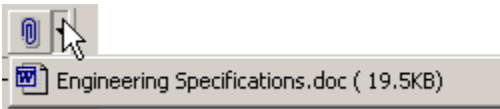
The user who invited the comments can check on the status of all the invited comments by clicking the  tab for the action item. The number (46) represents the number of invitations that were sent out for comment.

CW provides a list of all the invitations that have been sent, along with the status of the response, by invitee.

- Click the  in the response box to see the individual's response.

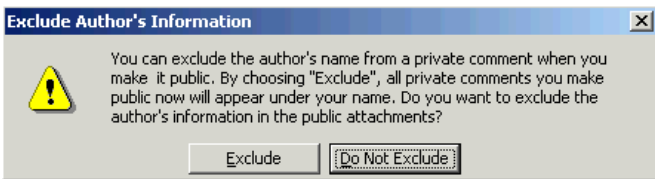


The person responsible for the original action item can choose how these comments are to be handled. The comments can be consolidated, used as input only, or published as public comments.



The Attachment button can be used to view any attachments sent with the original request.

- Click the button to publish these comments as public. The user will have the option of publishing the comments under the invitee's name, or under their own, if desired.

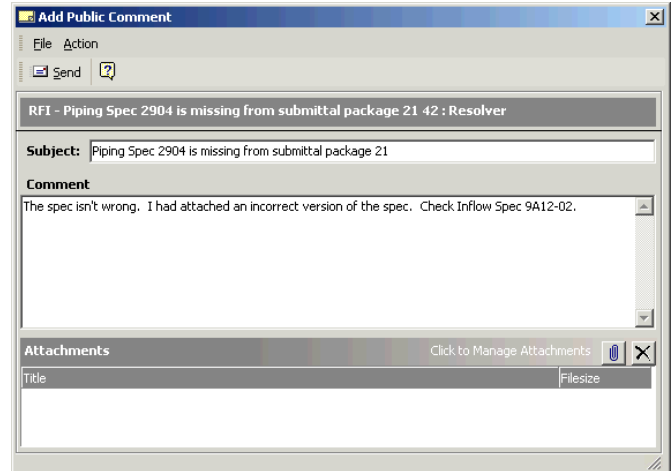


These comments will not be published or viewable until the user sends the action item on to the next recipient. Once the action item is sent, all invited comments will be visible only via the Business Process Log.

### Public Comments

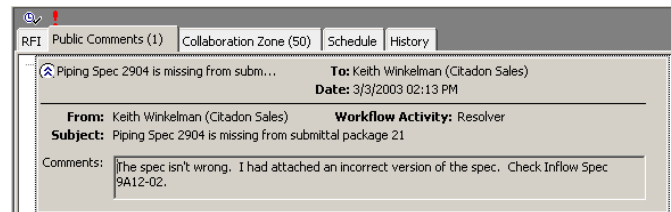
If a user chooses, a Public Comment can be added to any action item. This comment will be visible to anyone having access to the instance, the setup, or the Business Process Log.

- Click the button to add a Public Comment to an action item



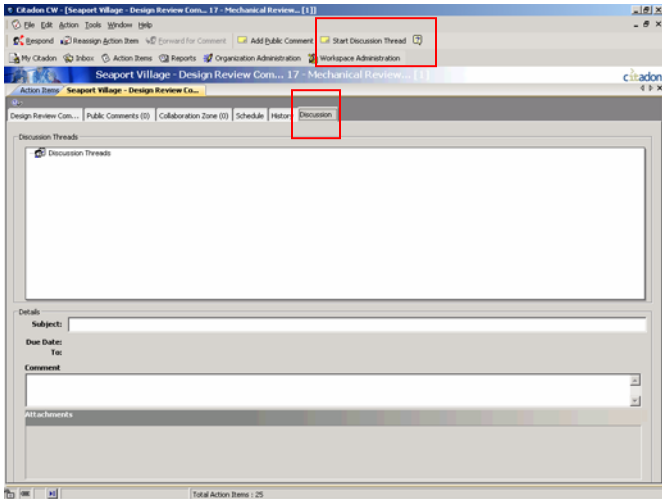
- Type in the comment and attach any desired document, binder, or business process instance. Then click to publish the comment. The comment will not be visible until the action item is sent to the next recipient.

Once the action item is sent, then Public Comments can be viewed by clicking the Public Comments tab in the action item.



### Discussions

Threaded discussions can be started with any member(s) of the project team. To start a threaded discussion, simply click the Discussion tab, then click the Start Discussion icon. Each time an entry is made by a participant of the discussion, notifications are sent to the other participants that a new thread has been added to the discussion. The other participants can then add their comments to the threaded discussion. The user with the Ball-in-Court action item determines when to close the threaded discussion by completing their action item



## Citadon Customer Support

### Citadon CW

Hours: 6am - 6pm PST  
<mailto:support@citadon.com>