webEdition User Guide

Workflow Module

webEdition Software GmbH

The Workflow Module
User Guide

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About this document

Purpose of this document

This document treats the webEdition..... and how to use it.

You can use this manual to learn:

- what theWorkflow Module is
- how to install the module
- how to use this module to manage your Web development processes
- how to create a customized workflow
- how to automate and track the assignment of development tasks

Audience

This document is intended for personnel in the following groups:

- Web administrators
- Web editors

The webEdition customer documentation suite

The documentation team publishes new webEdition documents to support the release of all webEdition features, modules and enhancements.

You can consult our documentation suite for detailed information about the modules you have purchased or about webEdition products that you may wish to purchase in the future. All customer documentation is available in portable document format (PDF) on the webEdition documentation Web page.

On-line reference documentation

The webEdition customer documentation suite comprises the following books, all of which you can obtain at URL:
http://www.webedition.de/english/downloads/Documentation.html

Standard webEdition documentation

The following books support the webEdition Standard suite:

- *The webEdition User Guide*
- *The webEdition Installation Guide*
- *The webEdition Tag Reference*

Documentation for webEdition modules

The following books support the webEdition modules:

- *The Customer Management and Customer Management PRO Module User Guide*

- *The Database/Object Module User Guide*

- *The Editor Plug-in User Guide*

- *The Newsletter Module User Guide*

- *The Scheduler and Scheduler PRO Module User Guide*

- *The Shop Module User Guide*

- *The Task Messaging Module User Guide*

- *The User Management and User Management PRO Module User Guide*

- *The Workflow Module User Guide*

What precautionary messages mean

webEdition documents include attention and caution messages, which are designed to draw your attention to important instructions.

Attention boxes

An attention box identifies information that is necessary for the proper performance of a specified task. For example:

ATTENTION

You must have the appropriate permissions in your user profile to complete this procedure. Permissions are assigned to you by your webEdition system administrator. Contact your webEdition system administrator for further details.
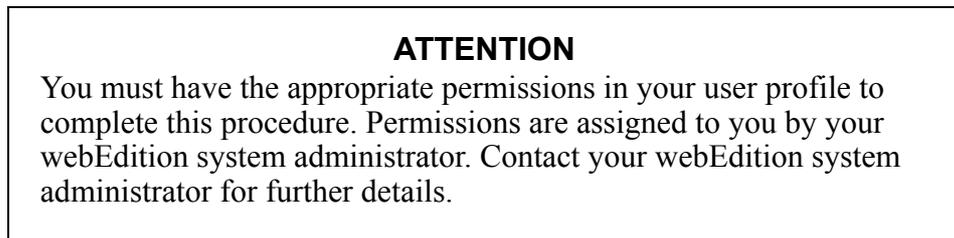
Caution boxes

Caution messages indicate that there are possible risks to your software or database if you perform a specified task without taking the suggested appropriate precautions. For example:

CAUTION
Database warning
If you complete this procedure, your database will be overwritten.
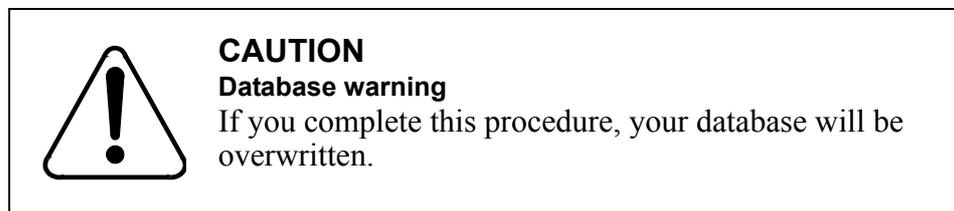
How commands, system responses and we:tags are represented

The commands, system responses and webEdition tags (called we:tags) used in this document conform to the following conventions.

Web interface commands

Commands performed through a Web browser are shown in *italic* typeface. For example:

Click on the *Save* button.

Menu-based commands performed in a Web browser are shown in *italic* typeface. Drop-down or nested menu commands are separated by an input prompt (>). For example:

Select *Customers > New* from the main menu of the Customer Management Module.

webEdition tags and template code

The webEdition templates use a specialized set of programming tags based on the PHP programming language. These webEdition tags or we:tags are displayed in `courier` typeface and in angled brackets:

Opening tags appear thus: `<we:tag/>`

Closing tags appear thus: `</we:tag>`

The programming code used in webEdition templates is also represented in this document by `courier` typeface:

```
<we:sessionStart/>
<we:ifRegisteredUser>
Hello: <we:sessionField Last name="user name" type="print"/><br>
Logged in
</we:ifRegisteredUser>
```

Attribute variables

Attributes and variables appear in `courier italic` typeface. For example:

```
<we:hidden name="attribute1">
```

How to check the document version and issue

The information on the title page of this document indicates the version and issue for this publication. The version and issue also appear in the footer on every even-numbered page.

The first two digits in the document numbering scheme indicate the version. The version number increases each time the document is updated to support a new software release. For example, the first release of a document is 01.01. In the next software release cycle, the first release of the same document is 02.01.

The second two digits in the document numbering scheme indicate the issue. The issue number increases each time the document is revised and re-released in the same software release cycle. For example, the second release of a document in the same software release cycle is 01.02.

Customer service

For further information about webEdition, please consult our Web page, or contact our customer service department:

- Web Page:http://www.webedition.biz/
- E-mail:
  — Technical support: technik@webEdition.de
  — Sales: sales@webEdition.de
  — Information/Help: info@webEdition.de

1 Workflow Module: Introduction

This introduction is intended to help you familiarize yourself with the webEdition Workflow Module. This chapter treats what the module does and how to install it. You can also find information here about the basic layout and command features for the Workflow Module. These topics are treated in the following sections:

- Section 1.1, "What is the webEdition Workflow Module?" on page 15
- Section 1.2, "Installation" on page 16
- Section 1.3, "General information and navigation" on page 16

ATTENTION

The Workflow Module requires the User Management Module (either the Standard or PRO version). You must install either the Standard or the PRO version of the User Management Module in order to use the Workflow Module.

1.1 What is the webEdition Workflow Module?

The webEdition Workflow Module allows you to create processes and to track all the steps required by you and your colleagues in the development of your web content.

Using the Workflow Module you can easily create sophisticated processes that streamline the administration of your content management operations.

You can automatically create authorization levels among the users within your organization, and assign to them their respective tasks. All tracking and notification functions are handled by the Workflow Module, removing the need for manual reporting using traditional methods such as E-mail, telephone or other tracking systems. The rights to create a workflow and to change documents in the workflow are controlled by the User Management Modules.

The Workflow Module complements the User Management PRO Module and the Task/Messaging Module.

1.2 Installation

The installation procedure for all modules is described in *The webEdition Installation, Update and Backup Procedures*. A .pdf version of this guide is available at the following URL: http://www.webedition.de/english/downloads/Documentation.html

> *Note:* You can also use the webEdition "Live update tool", which is available on the webEdition home page at www.webedition.de.

1.3 General information and navigation

Once you have installed the Workflow Module, *Workflow* will appear as an option in the *Modules* drop-down menu (see Figure 1).

Figure 1 Modules drop-down menu

1.3.1 Opening the Workflow Module

From the *Modules* drop-down menu, click on *Workflow*. The main Workflow Module page opens showing the *Quickstart* screen (see Figure 2):

Figure 2 Workflowt Module: *Quickstart* screen

Using the *Quickstart* screen, you have the option of going directly to a new workflow.

1.3.2 Workflow Module drop-down menu

The following items appear under the *Workflow* menu (see Figure 3, "The Workflow menu" on page 17):

- *New*. Use this command to create a new workflow process.

- *Save*. Select this command to save the workflow.

- *Delete.* Select this command to delete the workflow.

- *Empty logbook.* Use this command to modify what is saved in your workflow log files. Each document or object has a separate log. The quantity of data can become very large over time. With the *Empty logbook* function you can administer the contents of the log. For example, you can delete items that are older than a defined date. For further information about logbooks, see Section 3.8.2, "Using the logbook" on page 35.

- *Close.* Use this command to exit the Workflow Module.

Figure 3 The *Workflow* menu
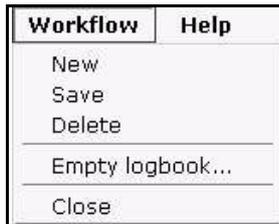
1.3.3 The Workflow Module explorer menu

The Workflow Module is a stand-alone and independent element within the webEdition environment. Using the Workflow Module you define processes through which other elements in webEdition, such as documents, must pass.

The content of these documents and objects is not affected by the process of the workflow. Therefore, different documents and objects can be assigned to different workflows. You can create unlimited workflows. (In theory you can have as many workflows as documented objects, but ideally you define workflows and assign them to specified directories which are assigned to each workflow.)

Individual workflows are stored in webEdition and they appear in the explorer menu. A small "w" (signifying a "workflow") appears in the upper right corner of the directory (see Figure 4).

Figure 4 The explorer menu showing workflow items

If you click the plus "+" sign, all active documents in the workflow appear. Active documents are those which are not complete, and which have not yet been published.

If there are no documents or objects in a specific workflow, the workflow directory will appear empty.

1.3.4 The document *Information* view

The *Information* view allows you to check the status of your document. You can access the information about a document by going to the explorer menu, and clicking on the name of the document that you wish to examine. The system opens the *Information* page (see Figure 5).

Figure 5 The *Information* view

The *Information* page records the following data:

- file type and size

- creation, modification and publication dates

- the *Local path* (file location on the local computer), and *HTTP path* (www location)

- workflow matrix (For more details about the workflow matrix, see Chapter 2, "Workflow design theory" on page 21.

1.3.5 The edit view of the Workflow Module

There are two views in the Workflow Module: *Properties* and *Overview*, each of which is accessed by its respective tab.

1.3.5.1 *Properties* view

Using the *Properties* view, you can name your workflow, and assign directories and document types as well as categories and objects to it (see Figure 6).

Figure 6 The *Properties* view

1.3.5.2 *Overview* view

Overview. In the *Overview* view, you can define the form of the workflow as a matrix and the properties of each step in the workflow (see Figure 7).

Figure 7 The *Overview* view

The Overview area has four columns:

- The *Step* column shows the number of the respective serial step in the workflow.

- *AND / OR* signifies the Boolean operator and is used to define the relationship to adjacent parallel steps. Once you have more than one user assigned to a step, that is once you have parallel step, you must choose if the step is to adhere to AND logic (all named users must authorize the release of a document) or the "OR" logic (only one of the users needs to authorize the release).

- *Worktime (H)* is the time (in hours) allotted for the completion of the task.
- *User* describes the user who has been assigned a task.

2 Workflow design theory

The following chapter describe briefly the theoretical principles behind the workflow process under the following sub sections:

2.1 What are serial and parallel steps?

Your business may require processes which are complex, and which include serial steps, or a combination of serial and parallel steps. Serial steps occur in succession; parallel steps occur concurrently. See, for example, Figure 8, "Hypothetical workflow" on page 21.

Parallels steps have to be connected using Boolean Logic. Either you connect the two parallel steps with AND logic, in which case both people have to authorize the document before it is transferred to the next step. Or you may use OR logic, in which case only one of the two member needs to approve the document.

Figure 8 Hypothetical workflow
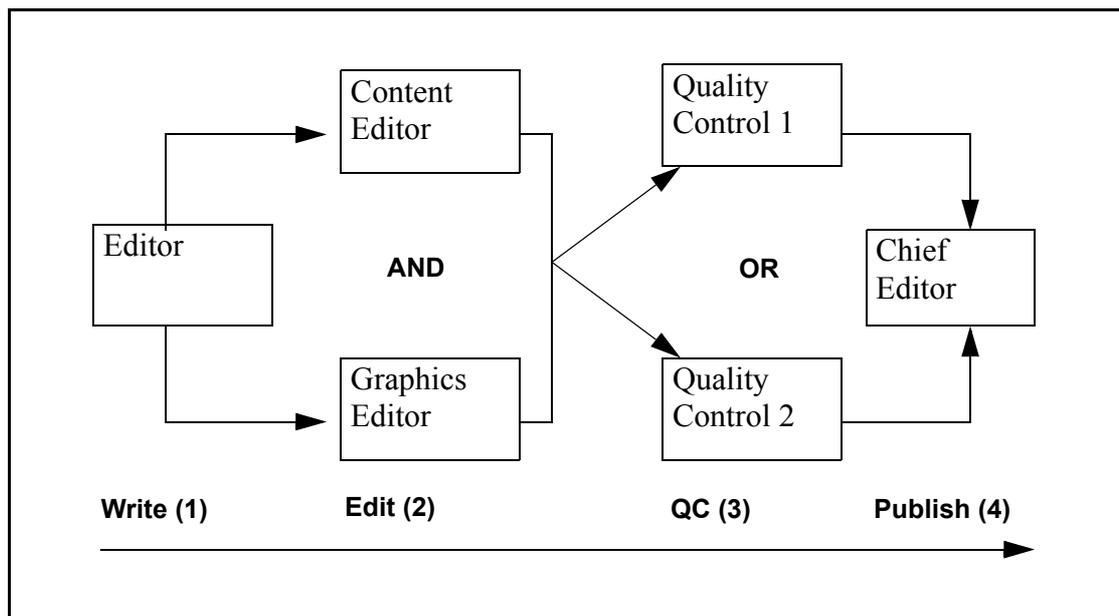
In the example in Figure 8, "Hypothetical workflow" on page 21:

1. The editor puts an article into the workflow.

2. The text goes to the content editor and the graphics editor. Because **AND** is used, both editors have to release the document before it can move to the next step.

3. In this step only one of the quality controllers needs to authorize the content (because **OR** logic has been selected).

4. The final decision is by the chief editor. The chief editor knows that the preceding steps have been accomplished according to the defined process. The chief editor has the right to publish the document.

2.1.1 User management

You can use the Workflow Module to define whether or not a person in the process has the permission to change a document. If the person to whom an item is sent does not have the permission to execute the request, the document is returned to the workflow for reassignment.

The Workflow module also allows you to generate an automatic E-mail to the person who has to review and release a work item.

2.2 Workflow design: a matrix

The workflow is designed like an n by m matrix.

In theory you can define n different steps in serial (along a horizontal axis, parallel to the time x) and m different steps in a parallel direction (along a vertical axis, perpendicular to the time x). You can extend the workflow in both directions: parallel and serial. For example, see Figure 9.

Figure 9 An example of a 3X2 matrix

Serial →

Step 1a	Step 2a	Step 3a
Step 1b	Step 2b	Step 3b

Parallel

Time
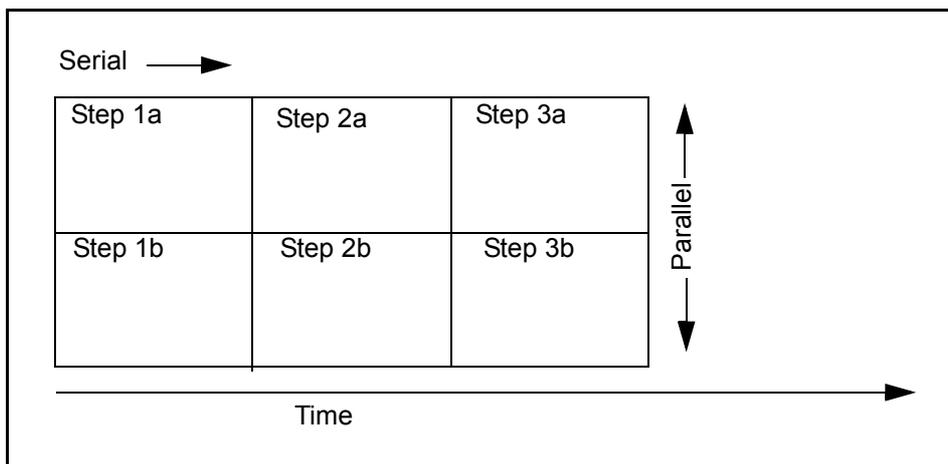
2.3 What kinds of documents can be assigned to a workflow?

Two types of webEdition documents can be assigned to a workflow:

- documents (webEdition pages, HTML pages)
- objects from the Database Object Module.

Documents can be assigned to one of two workflow types:

- Directory-oriented workflow. The workflow that a document needs to run through is defined by the directory where the document is saved.

- Document type or a category. In this case the workflow applies to all documents of a given document type or category.

Objects-based workflows are always tied to an object class.

2.4 Who can create a workflow?

As noted in the introduction, the Workflow Module requires the User Management or the User Management PRO Module. Depending on the version of the User Management Module that you have installed, there are different options available to you with respect to who can create a workflow.
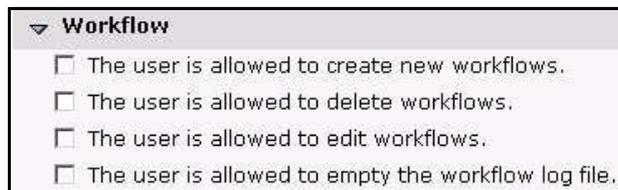
2.4.1 User Management Module (Standard version)

In the standard version only the administrator is allowed to create and change the workflow.

2.4.2 User Management PRO Module

User Management PRO Module allows you to assign to any user the right to create, change or delete a workflow (see Figure 10).

Figure 10 Permissions to define a workflow

For further information about the User Management Module and the User Management PRO Module, see the respective webEdition User Guides at the following URL: http://www.webedition.de/english/downloads/Documentation.html

2.4.3 Who has the right to publish?

The following users have the right to publish:

- users that have the right to publish according to the User Management Module

    Note: If a user has the right to publish according to the User Management Module, that person can publish at any time, thus finishing the workflow.

- users that are last in the workflow

    Note: The user at the last step of the workflow can publish even if this right has not been defined in the User Management Module.

Your ability to govern the publication rights of users varies depending on version of the User Management Module that you have purchased.

The (standard) User Management Module offers the controls shown in Figure 11. You must determine on an individual basis, whether or not you wish to give a user the right to publish. You do so by clicking on the *User is allowed to publish* check box.

Figure 11 Publication permissions in the User Management Module

The User Management PRO Module offers a suite of control features in addition to the *User is allowed to publish* check box (see Figure 12).

Figure 12 Publication permissions in the User Management PRO Module

In the chapter that follows, we shall see how to create and manage a workflow.

3 Creating a workflow

This chapter describes the procedures for creating a workflow and working on documents in a workflow.

The rights to create a workflow and to publish a document are controlled by the User Management Modules. Some of the procedures described in this chapter, particularly those associated with creating a workflow, can only be completed if the a user has been assigned the appropriate permissions. For information on permissions, see Section 2.4, "Who can create a workflow?" on page 23.

The following procedures appear in this chapter:

- Section 3.1, "Creating a new workflow" on page 25

- Section 3.2, "Defining the steps of the workflow" on page 27

- Section 3.3, "Setting the worktime variables" on page 28

- Section 3.4, "Selecting the users in a workflow" on page 28

- Section 3.5, "Using the in Workflow option" on page 30

- Section 3.6, "Using E-mail messages within the workflow" on page 31

- Section 3.7, "Using the Task/Messaging Module with the Workflow Module" on page 31

- Section 3.8, "Examining the status of a document and using the logbook" on page 34

- Section 3.9, "Using the "Worktime exceeded" feature" on page 36

3.1 Creating a new workflow

Use the following procedure to create a new workflow.

Procedure 1 Creating a new workflow

At the Workflow drop-down menu in the Workflow Module main screen

1 Click *Workflow > New*.

The system opens the Properties view as seen in Figure 13.

Figure 13 Creating a new workflow: the *Properties* view

2   In the *Name* field of the *Properties* view, type the name you wish to give to your new workflow.

3   In the area under the *Name* field, define which documents or objects need to pass through the workflow prior to publication. There are three options: *Directory-based*, *Document type/Category-based*, or *Object-based*.

  a   If you wish to create a directory-based workflow, do the following sub-steps:

   i   Click on the button beside the words *Directory-based*.

   ii   Click on the *add* button in the file manager, and choose the document(s) that must pass through the workflow.

        All documents in this directory need to pass through the workflow in order to be published.

        Note: You can also use this area to edit a workflow at a later date. To delete a directory, click on the "trash can" icon. To delete all items, click on the delete all button.

  b   If you wish to create a document-type/category-based workflow do the following sub-steps:

   i   Click on the button beside the words *Document type/Category-based*.

   ii   Choose a document type from the drop-down menu.

   iii   Click the *add* button under the *Categories* dialog box to access the category manager. The Category manager area opens and you can choose a category.

        Note: You can also use this area to edit a workflow at a later date. To delete a category, click on the trash bin. To delete all items, click on the *delete all* button.

  c   If you wish to create an object-based workflow, do the following substeps:

   i   Click on the button beside the words *Object-based*.

ii   Select which objects need to run through your workflow by clicking the *add* button.

The Object class manager window opens and you can choose the object class.

iii   Click the *add* button under the *Categories* dialog box to access the category manager. The Category manager window opens and you can choose the category.

> ***Note:*** You can also use this screen to edit a workflow at a later date. To delete an object class, click on the trash bin. To delete all items, click on the *delete all* button.

4   You have completed this procedure.

3.2 Defining the steps of the workflow

The following procedure describes how to define the steps for a new workflow.

Procedure 2 Defining the steps for a new workflow

In the Workflow Module Overview view

1   If you are not already in the *Overview* view, go to the *Overview* view, by clicking on the *Overview* tab (see Figure 14).

Figure 14 The Overview view

2   Use the *Overview* view to define your workflow as an *n* X *m* matrix, and to define all functions of the workflow. Add steps to your workflow by doing the following:

a   To extend the workflow by serial steps, click the plus "+" icon at the bottom left.

The workflow is now extended by one serial step (see Figure 15).

Figure 15 Adding a serial step to a workflow
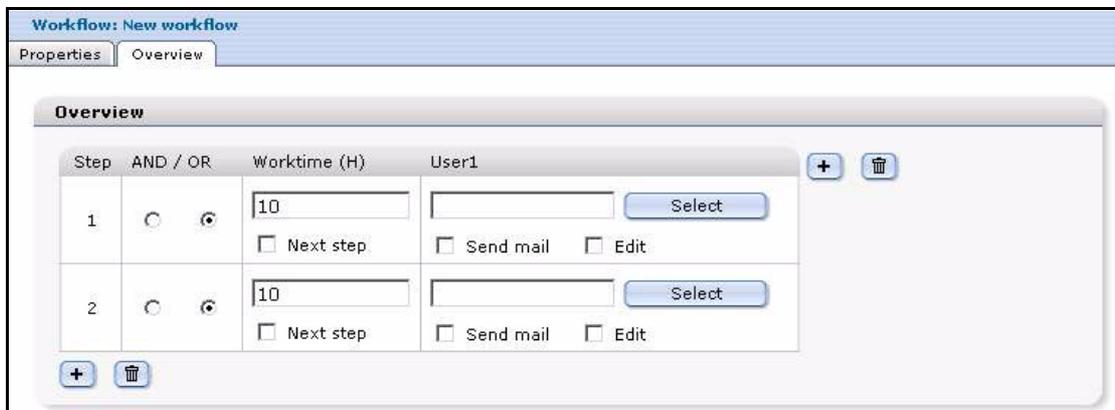
b   To extend the workflow in a parallel step, click on the plus "+" icon on the upper right corner (see Figure 16).

Figure 16 Adding a parallel step to a workflow

3   You have completed this procedure.

3.3 Setting the worktime variables

After defining the steps in the workflow, you must assign a value to each step to indicate the time of its expected completion.

Procedure 3 Setting the worktime for a step

In the Workflow Module Overview view

1   In the *Overview* view (see Figure 14, "The Overview view" on page 27), enter a value in hours in the *Worktime (H)* box. This value represents the maximum duration that the document can remain in this step.

For example, if you enter 24, the document remains for 24 hours in this position of the workflow.

2   If you wish the task to move to the next step (regardless of its completion), after the expiry of the allotted worktime, select the next step check box. If the option has not been activated the document will be returned to the sender.

3   You have completed this procedure.

3.4 Selecting the users in a workflow

Use the following procedure to select the users that are to be associated with each step in a workflow.

ATTENTION

Only users registered in the webEdition User Management Module can release documents.

ATTENTION: User Restrictions

If a user attempts to open a workflow document, and that user is not part of the workflow, he/she will be denied access to the document. A user that is not related to a workflow can view a document, but that user cannot change the document.

<table>
<tr><td>

⚠️
</td><td>

CAUTION
 Risk of lock out
The user who creates a document is not part of the workflow. After he/she has put the document into the workflow he/she cannot make any changes to the document. If, however, that user has the right to publish, he/she can publish the document immediately.
</td></tr>
</table>

Procedure 4 Selecting the users in a workflow

In the Workflow Module Overview view

1   In the *Overview* view (see Figure 14, "The Overview view" on page 27), click the *Select* button to choose a user.

The user manager area appears (see Figure 17).

Figure 17 User manager area

2   Choose a user by clicking on the appropriate name from the list of users.

Note: If you do not want to add a user in a parallel step, leave the respective field empty. You must always choose a serial user.

3   Click the *OK* button.

The designated user appears in the workflow.

4   Choose additional users (if required) by clicking on the plus symbol at the top right side of the frame, and associate the users with their designated step in the workflow (see Figure 18).

Figure 18 Users in a workflow

5   Select the *edit* check box to give a user the ability to make changes in the document or object associated with the workflow. If the *edit* check box is not activated, the user cannot change the document.

6   Select the *send mail* check box, if you want respective users to receive an E-mail as soon as a new document enters workflow or if the user has been sent a task.

The E-mail is always sent to the person who is next in the release process. The system takes the E-mail address from the User Management or User Management PRO Module.

ATTENTION

The right to publish is always controlled by the User Management or User Management PRO modules. The last user(s) in the process hierarchy automatically has the permission to publish even if that right has not been defined in the User Management Module. In addition, if a user of a previously defined level of the workflow has a right to publish, he/she can publish the document in advance if the document object lies in his/her user space.

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7   Save the workflow using the Save button on the lower left corner of the workflow screen (see Figure 19).

Figure 19 Saving and activating a workflow

8   Activate the workflow by selecting the Workflow is active check box (see Figure 19, "Saving and activating a workflow" on page 30).

If the workflow is not activated, the workflow is still saved, but it is not yet active for the related documents and objects. You can still publish these related documents and objects without the workflow. An inactive workflow appears in red.

Once the option workflow is active, all related documents can only be published after they run through the workflow. An active workflow appears in black in the workflow explorer menu. Only the user of the last workflow step can release a document for publishing.

9   You have completed this procedure.

3.5 Using the *in Workflow* option

After creating the steps in a workflow and assigning users to it, you need to assign a document to the workflow. You use the *in Workflow* button, which appears at the bottom of the webEdition main screen (see Procedure 5).

Procedure 5 Using the in Workflow option

In the Documents view of the webEdition main screen

1 Click on the *in Workflow* button to place the document or object into a workflow.

The Document in workflow screen appears as seen in Figure 20.

Figure 20 The *Document in workflow* screen
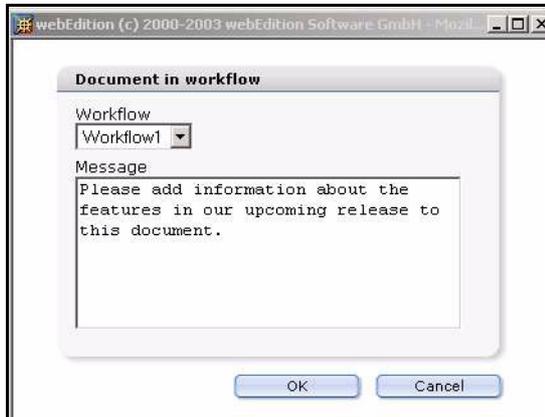
2 Select the workflow from the *Workflow* drop-down menu.

3 In the *Message* field, include a short message to the person who is next in the workflow.

The person to whom you have sent the message will see your message in his/her task list.

4 Confirm by clicking *OK*.

If you do not confirm with *OK*, the object does not go into the workflow. Once you have put the document into the workflow, the document appears in red in the explorer menu.

5 You have completed this procedure.

3.6 Using E-mail messages within the workflow

Communication is important when using a workflow. People must be informed of their role in the workflow. There are two ways to communicate with your colleagues. You can use the following methods:

• an external E-mail system

• webEdition messaging

As discussed in Section 3.4, "Selecting the users in a workflow" on page 28, all the people who have assignments in the workflow (including those who must check, forward, or release documents) have been designated to their tasks. You can define whether on not a user receives an E-mail describing their task (see Figure 18, "Users in a workflow" on page 30). Once you place a document into the workflow, the system generates a standard E-mail message form, which includes a text box in which you write your message. The system also enters the E-mail address (as it is recorded in the User Management Module) of the next person in the workflow to whom the message is to be sent.

3.7 Using the Task/Messaging Module with the Workflow Module

The webEdition Workflow Module requires the Task/Messaging Module to work. The Task/Messaging Module helps you to send messages to the user who has been assigned to work on a document or object in the next step of a workflow.

Once installed, the Task/Messaging Module produces two icons in the top right frame of the webEdition screen. The same icons are visible on the webEdition *Quickstart* screen (see Figure 21, "Task/Messaging icons" on page 32):

Figure 21 Task/Messaging icons

•the envelope icon signifying a message

•the check mark icon signifying a task

If you click one of the icons, the Task/Messaging Module opens.

The tasks and messages of the Task/Messaging Module are used like a private E-mail box. The tasks and messages are intended for, and accessible to, a specific user, who has been registered in the User Management Module.

For a detailed description of the Task/Messaging Module and how to use it, see the *The Task/Messaging Module User Guide* at the following URL: http://www.webedition.de/english/downloads/Documentation.html

Using the Task file of the Task/Messaging Module, you can define all the tasks associated with a specific user. When a document is entered by an editor into the workflow, it appears in the task list of the next person in the workflow.

Procedure 6 How to process a task in the workflow

In the webEdition main screen

1 Once you log into the system you will see the number of unfinished tasks next to the task icon on the top right of your screen, or in the *Quickstart* screen as seen in Figure 21, "Task/Messaging icons" on page 32.

Click on the task icon.

The system automatically opens the Task/Messaging Module, and task window appears with a list of your open tasks (see Figure 22).

Figure 22 Task notification

2 Click the workflow task that appears in your list.

A description of the task and a notice alert appears in the lower part of the window. A link to the document or object that needs to be worked on is automatically generated as seen in Figure 23.

Figure 23 Details about a task

3 In the bottom frame of the page, click the *Document* link.

The document (or object) opens for editing. At the bottom of the page are three option (see Figure 24).

Figure 24 Declining, forwarding or saving a task

4 As a recipient of a task, you have one of three choices. Do one of the following sub steps:

    a Work on the task. You can work on the task in the open edit window and save your changes by selecting the *Save* button. (Thereafter you can forward the task, see Step c).

    b Decline the task and send the task back to the originator.

        i Select *Decline*.

        The Decline document dialogue box opens (see Figure 25).

Figure 25 Decline document dialogue box

        ii Enter an explanation about why you are rejecting the task.

        iii Click *OK*, then go to Step 5.

When a task is declined, the system activates the task notification icon on the originator's screen. When the originator opens the task, he/she sees your message, as shown in Figure 26.

Figure 26 Notification of a declined task

c Forward the task.

After you have completed the work assigned to you, save your page, then select *Forward* to send the task to the next user in the workflow.

You receive an on-screen message from the system that the document has been passed on in the workflow. The next person in the workflow will receive a task notification.

5 You have completed this procedure.

Note: If you decline or forward the document or object, a value of 100% will appear in the *Status* column of the task notification screen and the task will be saved in the *Done* folder where all tasks are saved. Rejected tasks will be saved in the *Rejected* folder in the explorer menu.

3.8 Examining the status of a document and using the logbook

There are two ways to examine the status of a document within the Workflow Module. You can access data about the progress of a document in the workflow by

- checking the document *Information* view
- checking the log book

3.8.1 Using the *Information* view

The following procedure describes how to check the status of your document using the information view.

Procedure 7 How to check the status of a document

In the Workflow Module

1   Go to the explorer menu and click on the name of the document that you wish to examine.

2   Click the *Information* tab.

The system opens the Information view (see Figure 27).

Figure 27 The *Information* view

3   Examine the matrix at the bottom of the *Information* view for the status of the document.

The matrix tells you about the steps, the user names of those involved in the workflow and the alloted worktime.

4   You have completed this procedure. If you wish to see details and the comments entered by users about completed tasks, see Section 3.8.2, "Using the logbook" on page 35.

3.8.2 Using the logbook

The logbook is an archive of all workflow activities. It gives you information about all workflows so that you can always see who has done what and when. You can see the log report for each document by opening the *Information* view (as shown in Figure 27, "The Information view" on page 35) and selecting the *logbook* button at the bottom of the screen).

The logbook includes the following information in a tabular format (see Figure 28, "The logbook in the information view" on page 36):

•   *Action*. This column describes what has happened to the document in the workflow.

•   *Description*. This column provides a description of the task associated with the workflow step.

- *Time*. Time of the action in the workflow.

- *User*. The person who performed the activity.

Figure 28 The logbook in the information view

Action	Description	Time	User
Workflow is finished.		2004-02-11 - 17:35	- - (Quality)
User has forcibly approved document.		2004-02-11 - 17:35	- - (Quality)
User has approved document.	I have finished updating the webEdition logo for release 3. Please review and publish if it meets with your approval.	2004-02-11 - 17:32	- - (Illustrator)
Document has been inserted into wokflow.	Please update the graphics to include our release 3 logo.	2004-02-11 - 17:22	webEdition - (dan)

3.9 Using the "Worktime exceeded" feature

The worktime exceeded feature informs users that they have exceeded the time allotted to an assigned task.

In order for the "Worktime exceeded" message feature to function, you must set up a PHP script on your server that will monitor the process of the tasks at regular intervals.You will find the script in the following directory: webEdition/we/include/ we_modules/workflow/weWorkflowCron.php.

If you are using a UNIX server, you set up this script using a chron job (to do so see Procedure 8, "Creating a chron job on a UNIX server" on page 37). If you are using a windows server, use the Task Scheduler (to do so see Procedure 9, "Creating a planned task using Windows" on page 37).

Note: Not all Internet service providers offer these services. Contact your provider for availability.

ATTENTION

If you do not set up the chron job or scheduled task, the automatic message feature informing users of the exceeded worktime will not function.

3.9.1 Creating a chron job using UNIX

Prerequisites:

- The chron program must exists on the server

- you can run a PHP script via HTTP (that is, a text-based web browser or an HTTP downloader).

The chron program on a UNIX server can be lynx, wget, curl or a similar application. The chron job starts this program on a scheduled basis and gives it the URL of the PHP script. The program then starts the PHP script.

How to set up a chron job varies among Internet service providers. Many providers have a web interface. Contact your provider for further help, if necessary.

If your provider offers telnet or ssh or direct access via your terminal, you can set up the chron job by doing Procedure 8, "Creating a chron job on a UNIX server" on page 37.

Procedure 8 Creating a chron job on a UNIX server

In a UNIX terminal window

1   At the UNIX prompt, type

```
crontab –e
```

This command opens the default editor of the server (normally a vi editor).

2   Write the following string:

```
0,10,20,30,40,50 * * * * Program
http://www.YourDomain.de/webEdition/we/include/
we_modules/workflow/weWorkflowCron.php
```

In place of the variable, *Program* , type either lynx, curl or the name of the text-based browser or HTTP downloader you are using.

In the place of the variable, *www.YourDomain.de* variable enter your domain name.

>   **Note:** In this example, the 0…50 indicates that the chron job will run every 10 minutes.

3   Save.

4   You have completed this procedure.

3.9.2 Creating a planned task using the Windows Task Scheduler

With a windows server you need a program that runs a PHP script or HTTP. You can use Internet Explorer, or another external program, such as wget.

Note: We recommend wget for Windows. You can download it using the following link: http://www.interlog.com/~tcharron/wgetwin.html

Procedure 9 Creating a planned task using Windows

On your Windows desktop

1   Click on *Start > Settings > Control Panel*.

2   Click on *Scheduled Tasks*.

The task assistant opens.

3   Click *continue*.

4   A dialog appears where you choose the program you wish to use.

5   Select your program of choice (such as weget.exe).

6   Set up the time interval for the scheduled task.

7   Enter your user name and password, then click the *Continue* button.

8   Activate the check box for extended properties.

9   Click *finish*.

10 Open the weget application.

11 In the weget application, insert the webEdition URL into the wget parameter settings.

http://www.YourDomain.de/webEdition/we/include/
we_modules/workflow/weWorkflowCron.php

12 Click on the *Time plan* tab.

13 Click on the *Extended* button, and define the following options:

a Activate the *Repeat interval* check box.

b Adjust the interval (for example, 10 minutes).

c Set the duration to 24 hours.

d Click *OK*.

14 Click on the *Adjustment* tab, and select the time after which the task must end (for example, 1 minute).

15 Click *OK*.

The task is now defined and set up. It will appear in the *Scheduled Task* window.

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