Restarting a Workflow Document

Purpose
The purpose of this procedure is to restart a Workflow document that is not progressing through the Workflow.

Example reasons
A restart is required for such reasons as the following:
• The document is indexed as an incorrect invoice type.
• A coder's ID has expired.

Receipt of a restart request
A request is received through one of the following:
• The Workflow email address in Lotus Notes
• The Workflow Program Administrator’s inbox

Job title/role code required
To restart a Workflow invoice, you must have the SAP role of Workflow Program Administrator.

Procedure
Complete these tasks to complete this procedure:
• Obtaining the FileNet document number
• Verifying the Workflow status
• Restarting the document
• Verifying the restart

Obtaining the FileNet document number
Follow these steps to obtain the FileNet document number:

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Diagram</th>
</tr>
</thead>
</table>
| 1    | Did the request to restart the Workflow invoice come through SAP Workflow as a document forwarded to you?  
   | • If yes, go to the next step.  
   | • If no, go to the step 3.  
   | Reference: See Receipt of a restart request for more information. | ![Diagram](image)
| 2    | Click ![Click on Image](image)  
   | Location: The link is listed under the Objects and attachments section at the bottom of the Business Workplace screen.  
   | Result: A Workflow email appears that contains the FileNet document number. | ![Diagram](image)
| 3    | Note the FileNet document number in the Lotus Notes email. | ![Diagram](image)

Continued on next page
Verifying the Workflow status

Follow these steps to verify the Workflow status of the document:

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Diagram</th>
</tr>
</thead>
</table>
| 1    | Open SAP transaction **ZOP_ALM**.  
*Result:* The Optura AP Link Monitor screen appears. | ![Diagram](image) |
| 2    | Type the document number in the **FileNet Doc Id** field. | ![Diagram](image) |
| 3    | Click **Execute**.  
*Result:* The AP Link Monitor Report screen appears, showing the details of the document and having either STARTED or COMPLETED in the Workflow status column. | ![Diagram](image) |
| 4    | Verify the document number. | ![Diagram](image) |
| 5    | **Warning:**  
You cannot restart a completed workflow.  
Is the word **COMPLETED** in the **Workflow status** column?  
- If **yes**, return the image to Private Records Management.  
*Reason:* The document is re-scanned and indexed and provided a new FileNet Document number.  
*Result:* You have completed this procedure.  
- If **no**, go to the next step.  
*Reason:* The status is not completed with a word such as **STARTED** in the **Workflow status** column. | ![Diagram](image) |
| 6    | Click **Delete**.  
*Result:* The Cancel Image Workflow dialog box appears. | ![Diagram](image) |
| 7    | Click **Yes**.  
*Result:* The Workflow status changes to CANCELLED and the SAP message at the bottom of the screen states the document is successfully cancelled. | ![Diagram](image) |

*Continued on next page*
**Warnings**
These warnings apply to the next task:
- *Never* alter the invoice date, amount, or reference number from what appears on the image.
- *Never* use any other SAP transaction other than ZOP_INDX for a restart.

**Restarting the document**
Follow these steps to restart the Workflow document:

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Open SAP transaction <strong>ZOP_INDX</strong>.</td>
</tr>
</tbody>
</table>
| 2    | Complete any combination of these fields, as needed to identify the invoice:  
  - FileNet Doc Id  
  - Invoice Date  
  - Invoice Number  
  - Invoice Amount  
  - Vendor Name  
  - Postal Code  
  - Purchase Order number (only for PO inv type)  
  - Our contact (Applicable WF number)  
  **Source:** See the AP Link Monitor Report screen to obtain the information. |
| 3    | Click the **Invoice Type** button and select the type of invoice from the drop-down list in the **Invoice Type** field, if applicable. |
| 4    | Click **Execute**.  
  **Result:** The Workflow document is restarted. |

*Continued on next page*
Verifying the restart

Follow these steps to verify a successful Workflow document restart occurred:

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Diagram</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>On the AP Link Monitor Report screen, click <strong>Back</strong>.</td>
<td><img src="image1.png" alt="Diagram" /></td>
</tr>
<tr>
<td></td>
<td><strong>Result:</strong> The screen refreshes to the changed status.</td>
<td><img src="image2.png" alt="Diagram" /></td>
</tr>
<tr>
<td>2</td>
<td><strong>Is the status</strong> <strong>STARTED</strong>?</td>
<td><img src="image3.png" alt="Diagram" /></td>
</tr>
<tr>
<td></td>
<td>• If <strong>yes</strong>, you have completed this procedure.</td>
<td><img src="image4.png" alt="Diagram" /></td>
</tr>
<tr>
<td></td>
<td>• If <strong>no</strong>, go to the next step.</td>
<td><img src="image5.png" alt="Diagram" /></td>
</tr>
<tr>
<td>3</td>
<td><strong>Return to the ZOP_INDX screen and verify that the restart was successful.</strong></td>
<td><img src="image6.png" alt="Diagram" /></td>
</tr>
<tr>
<td></td>
<td><strong>Reference:</strong> See <a href="#">Restarting the document</a> for more information.</td>
<td><img src="image7.png" alt="Diagram" /></td>
</tr>
<tr>
<td>4</td>
<td><strong>Was the restart successful?</strong></td>
<td><img src="image8.png" alt="Diagram" /></td>
</tr>
<tr>
<td></td>
<td>• If <strong>yes</strong>, send a screen print to Tina Smith via e-mail to investigate why the restart did not successfully update in ZOP_ALM.</td>
<td><img src="image9.png" alt="Diagram" /></td>
</tr>
<tr>
<td></td>
<td>• If <strong>no</strong>, repeat this procedure.</td>
<td><img src="image10.png" alt="Diagram" /></td>
</tr>
</tbody>
</table>