

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

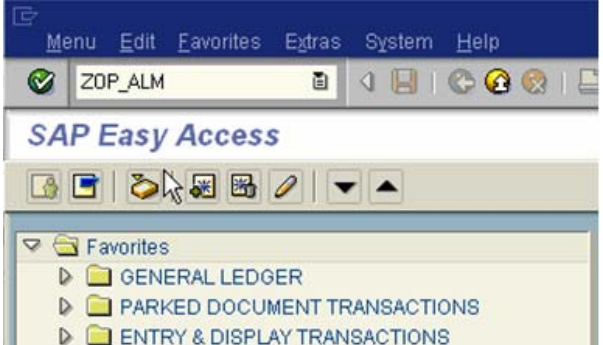
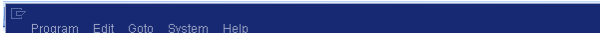

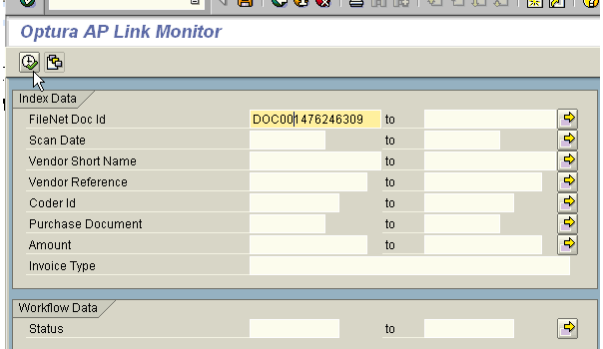

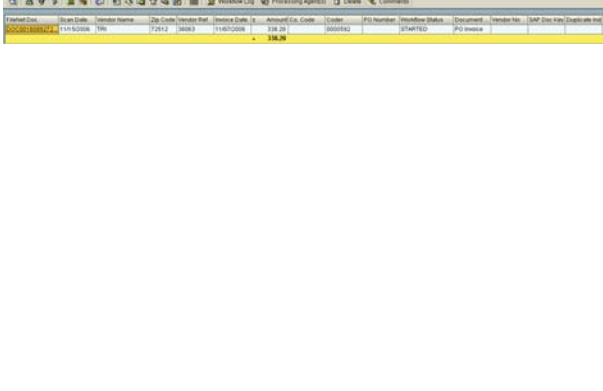



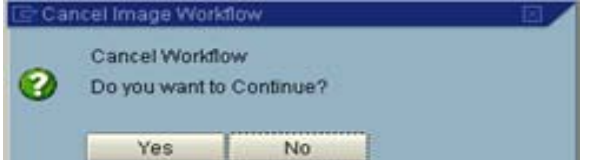
Follow these steps to obtain the FileNet document number:

Step	Action	Diagram
1	<p>Did the request to restart the Workflow invoice come through SAP Workflow as a document forwarded to you?</p> <ul style="list-style-type: none"> • If yes, go to the next step. • If no, go to the step 3. <p>Reference: See Receipt of a restart request for more information.</p>	
2	<p>Click APLink extension ArchiveLink Image: A6DQC001476246309.</p> <p>Location: The link is listed under the Objects and attachments section at the bottom of the Business Workplace screen.</p> <p>Result: A Workflow email appears that contains the FileNet document number.</p>	
3	<p>Note the FileNet document number in the Lotus Notes email.</p>	

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Verifying the Workflow status

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

Step	Action	Diagram
1	<p>Open SAP transaction ZOP_ALM.</p> <p>Result: The Optura AP Link Monitor screen appears.</p>	 <p>The screenshot shows the SAP Easy Access interface. At the top, there is a menu bar with 'Menu', 'Edit', 'Favorites', 'Extras', 'System', and 'Help'. Below the menu bar, the transaction code 'ZOP_ALM' is entered in the search field. The 'SAP Easy Access' title is displayed. A 'Favorites' list is visible, containing 'GENERAL LEDGER', 'PARKED DOCUMENT TRANSACTIONS', and 'ENTRY & DISPLAY TRANSACTIONS'.</p>
2	<p>Type the document number in the FileNet Doc Id field.</p>	 <p>This screenshot is identical to the previous one, showing the SAP Easy Access interface with 'ZOP_ALM' entered in the search field.</p>
3	<p>Click  Execute.</p> <p>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.</p>	 <p>The screenshot shows the 'Optura AP Link Monitor' report screen. It features a table with columns for 'Index Data' and 'Workflow Data'. The 'Index Data' section includes fields for 'FileNet Doc Id' (with value 'DOC001476246309'), 'Scan Date', 'Vendor Short Name', 'Vendor Reference', 'Coder Id', 'Purchase Document', 'Amount', and 'Invoice Type'. The 'Workflow Data' section shows a 'Status' field.</p>
4	<p>Verify the document number.</p>	 <p>This screenshot is identical to the previous ones, showing the SAP Easy Access interface with 'ZOP_ALM' entered in the search field.</p>
5	<p>Warning: You <i>cannot</i> restart a completed workflow.</p> <p>Is the word COMPLETED in the Workflow status column?</p> <ul style="list-style-type: none"> If yes, return the image to Private Records Management. <p>Reason: The document is re-scanned and indexed and provided a new FileNet Document number.</p> <p>Result: You have completed this procedure.</p> <ul style="list-style-type: none"> If no, go to the next step. <p>Reason: The status is not completed with a word such as STARTED in the Workflow status column.</p>	 <p>The screenshot shows the 'AP Link Monitor Report' screen. It displays a table with columns for 'Created Date', 'Scan Date', 'Vendor Name', 'Doc Code/Vendor Ref', 'Invoice Date', 'Amount', 'Code', 'Code', 'PO Number', 'Workflow Status', 'Document', 'Invoice No.', and 'SAP Doc Key/Document Ref'. The 'Workflow Status' column contains the word 'COMPLETED'.</p>
6	<p>Click  Delete.</p> <p>Result: The Cancel Image Workflow dialog box appears.</p>	 <p>The screenshot shows a dialog box titled 'Cancel Image Workflow'. It contains the text 'Cancel Workflow' and 'Do you want to Continue?'. There are two buttons: 'Yes' and 'No'.</p>
7	<p>Click .</p> <p>Result: The Workflow status changes to CANCELLED and the SAP message at the bottom of the screen states the document is successfully cancelled.</p>	 <p>This screenshot is identical to the previous one, showing the 'Cancel Image Workflow' dialog box with 'Yes' and 'No' buttons.</p>

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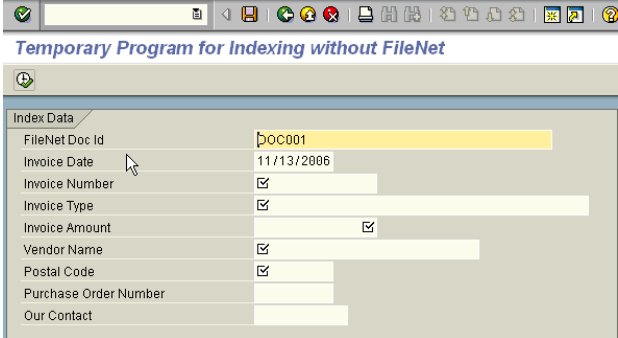
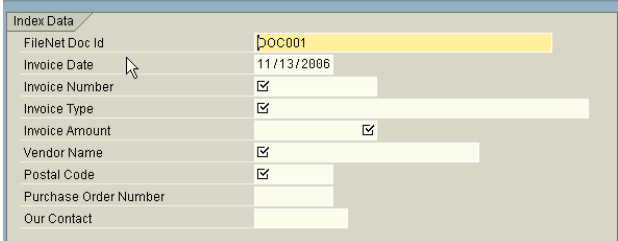

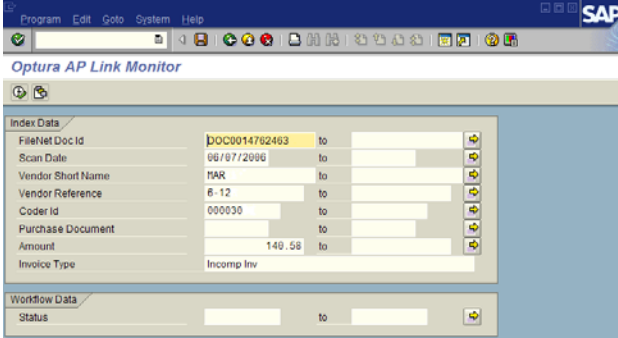

Warnings

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


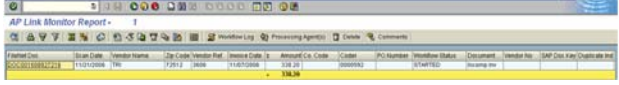
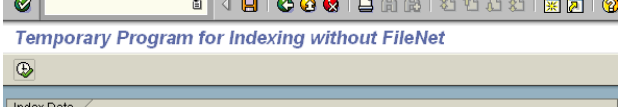
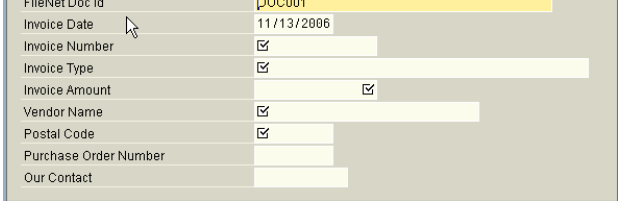
Follow these steps to restart the Workflow document:

Step	Action	Diagram
1	Open SAP transaction ZOP_INDX .	
2	Complete any combination of these fields, as needed to identify the invoice: <ul style="list-style-type: none"> • 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.	

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Verifying the restart

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

Step	Action	Diagram
1	On the AP Link Monitor Report screen, click  Back . Result: The screen refreshes to the changed status.	
2	Is the status STARTED ? <ul style="list-style-type: none"> • If yes, you have completed this procedure. • If no, go to the next step. 	
3	Return to the ZOP_INDx screen and verify that the restart was successful. Reference: See Restarting the document for more information.	
4	Was the restart successful? <ul style="list-style-type: none"> • If yes, send a screen print to Tina Smith via e-mail to investigate why the restart did not successfully update in ZOP_ALM. • If no, repeat this procedure. 	