

# 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

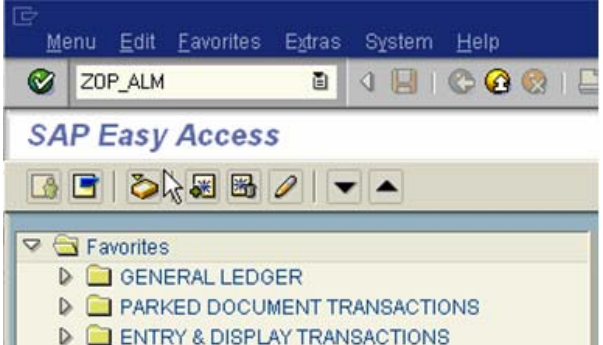
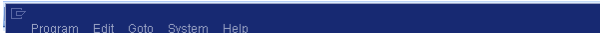

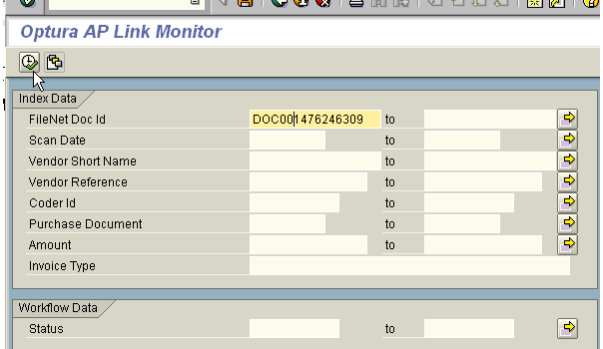

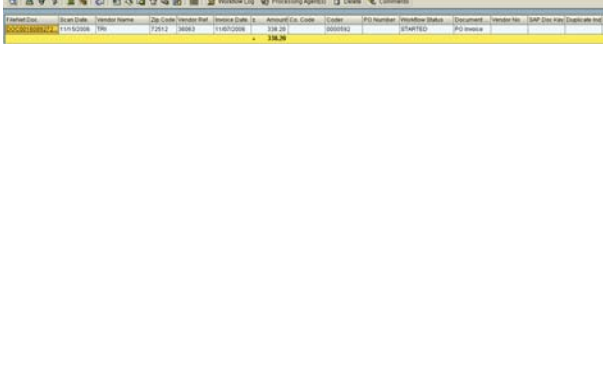



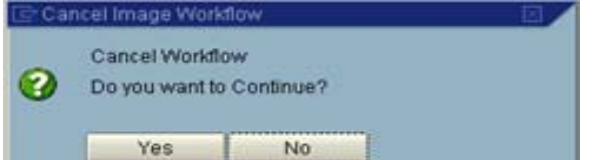
Follow these steps to obtain the FileNet document number:

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"> <li>• If <b>yes</b>, go to the next step.</li> <li>• If <b>no</b>, go to the step 3.</li> </ul> <p><b>Reference:</b> See <a href="#">Receipt of a restart request</a> for more information.</p>	
2	<p>Click <a href="#">APLink extension ArchiveLink Image: A6D0C001476246309</a>.</p> <p><b>Location:</b> The link is listed under the Objects and attachments section at the bottom of the Business Workplace screen.</p> <p><b>Result:</b> A Workflow email appears that contains the FileNet document number.</p>	
3	<p>Note the FileNet document number in the Lotus Notes email.</p>	

Continued on next page

## Verifying the Workflow status

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

Step	Action	Diagram
1	<p>Open SAP transaction <b>ZOP_ALM</b>.</p> <p><b>Result:</b> 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 &amp; DISPLAY TRANSACTIONS'.</p>
2	<p>Type the document number in the <b>FileNet Doc Id</b> field.</p>	 <p>This screenshot is identical to the previous one, showing the SAP Easy Access screen with 'ZOP_ALM' entered in the search field.</p>
3	<p>Click  <b>Execute</b>.</p> <p><b>Result:</b> The AP Link Monitor Report screen appears, showing the details of the document and having either <b>STARTED</b> or <b>COMPLETED</b> in the Workflow status column.</p>	 <p>The screenshot shows the 'Optura AP Link Monitor' report screen. It features a table with 'Index Data' and 'Workflow Data'. The 'Index Data' table has columns for 'FileNet Doc Id', 'Scan Date', 'Vendor Short Name', 'Vendor Reference', 'Coder Id', 'Purchase Document', 'Amount', and 'Invoice Type'. The 'FileNet Doc Id' field contains the value 'DOC001476246309'. 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 screen with 'ZOP_ALM' entered in the search field.</p>
5	<p><b>Warning:</b> You <i>cannot</i> restart a completed workflow.</p> <p>Is the word <b>COMPLETED</b> in the <b>Workflow status</b> column?</p> <ul style="list-style-type: none"> <li>If <b>yes</b>, return the image to Private Records Management.</li> </ul> <p><b>Reason:</b> The document is re-scanned and indexed and provided a new FileNet Document number.</p> <p><b>Result:</b> You have completed this procedure.</p> <ul style="list-style-type: none"> <li>If <b>no</b>, go to the next step.</li> </ul> <p><b>Reason:</b> The status is not completed with a word such as <b>STARTED</b> in the <b>Workflow status</b> 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/Status'. The 'Workflow Status' column contains the value 'COMPLETED'.</p>
6	<p>Click  <b>Delete</b>.</p> <p><b>Result:</b> The Cancel Image Workflow dialog box appears.</p>	 <p>The screenshot shows the 'Cancel Image Workflow' dialog box. It contains the text 'Cancel Workflow' and 'Do you want to Continue?' with 'Yes' and 'No' buttons.</p>
7	<p>Click  <b>Yes</b>.</p> <p><b>Result:</b> The Workflow status changes to <b>CANCELLED</b> 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>

Continued on next page

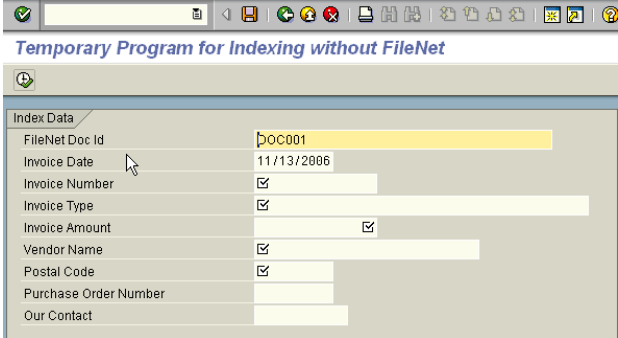
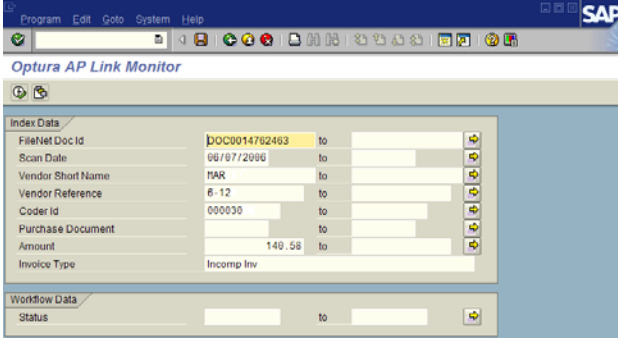

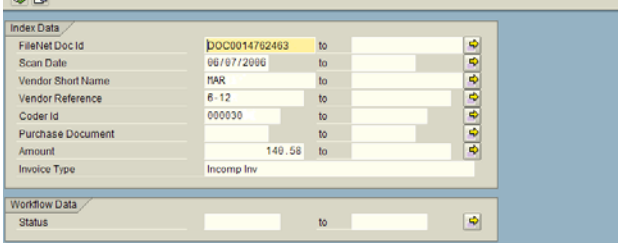

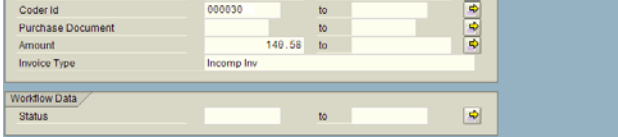
## Warnings

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\_INDXX for a restart.

## Restarting the document


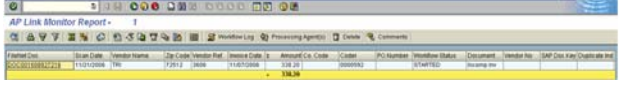
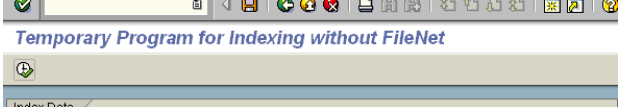
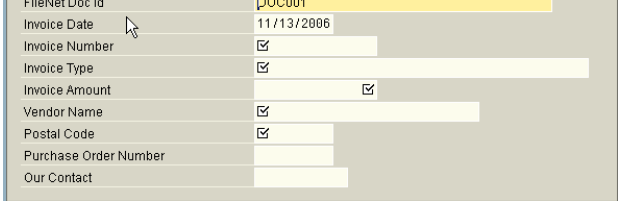
Follow these steps to restart the Workflow document:

Step	Action	Diagram
1	Open SAP transaction <b>ZOP_INDXX</b> .	
2	Complete any combination of these fields, as needed to identify the invoice: <ul style="list-style-type: none"> <li>• FileNet Doc Id</li> <li>• Invoice Date</li> <li>• Invoice Number</li> <li>• Invoice Amount</li> <li>• Vendor Name</li> <li>• Postal Code</li> <li>• Purchase Order number (only for PO inv type)</li> <li>• Our contact (Applicable WF number)</li> </ul> <b>Source:</b> See the AP Link Monitor Report screen to obtain the information.	
3	Click the <b>Invoice Type</b>  button and select the type of invoice from the drop-down list in the <b>Invoice Type</b> field, if applicable.	
4	Click  <b>Execute</b> . <b>Result:</b> The Workflow document is restarted.	

Continued on next page

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