



EPworX 12.0

User Manual

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Overview

This manual describes the workflow management system *EPworX*. It aims at users who want to use this system in their everyday work. It is written to assist first time users of *EPworX* as well as to act as a reference book for everyday work with the system.

The manual consists of the following chapters:

- The first chapter presents the fundamental terms of workflow management. It also outlines the purpose of the system *EPworX*.
- The second chapter contains a general system description. It puts emphasize on working with a WWW (World Wide Web)-browser. This chapter is a simple instruction manual for your first steps with the system and shows fundamental concepts in *EPworX*.
- The third chapter describes the Dashboard.
- The fourth chapter is a detailed description of the worklist - the central component for the everyday use of *EPworX*.
- The fifth chapter addresses the handling of documents and notes.
- The sixth chapter holds the appendix, in which the task functions are described.

To give you a better orientation in the manual, the icons that are used by *EPworX* are shown in the margin. The following list shows the icons most frequently used within *EPworX* :



- **Calendar:** Clicking this icon displays the *EPworX* calendar. The calendar assists you in entering the date (see section [Calendar and time selection](#) for details).



- **Functions:** This icon represents functions to a task in *EPworX* . It appears in the appropriate column of the worklists. Clicking this icon lists the available functions.



- **Document:** This icon signalsizes that there are additional documents attached to the task.



- **Form:** This icon represents a form. The form can be displayed by clicking the icon.

- **Note:** *EPworX* distinguishes between three types of notes: *global notes*, *private notes* and *system notes* (only for processes). System notes are written by the system (e.g. during aborting a process) and are not editable. The icon for global notes acts as a link to the note view in *EPworX* .



- **Versions of documents:** This icon is also used in the *document management*. It shows that there are different versions of a document available.



Throughout the manual an additional **hint** icon is used. If this icon appears in the margin, useful tips will be given. This icon is only used in the manual, but not in *EPworX* .

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1. Definitions

Some of the definitions may not make much sense to you at the moment, especially if you are new to workflow management systems. In this case just have a glance on the terms and go to the example at the beginning of the next chapter. You can then refer back to this definitions on the ground of an intuitive understanding.

1.1 Workflow Management System

Within a very short time workflow management systems (WFMS) have gained great importance for the design of information and communication systems in organizations.

WFMSs are software systems, which are designed to facilitate, control and monitor business processes – particularly office processes - that are based on division and flow of labor. Hence, WFMSs are systems, which support the handling of processes. The key idea is to forward processes automatically to the appropriate person in charge – (workflow) user or agent – according to predefined procedures – the workflow specification or process description.

Beside the control function, WFMSs offer a series of management functions, which facilitate in particular the monitoring of processes. Typical monitoring functions are:

- Status of a certain process
- Person handling the process at the moment
- People involved in the process so far etc.

1.2 Workflow Specification

A workflow specification is the (formal) description of a business process. In *EPworX* it can be done graphically or as program code.

A business process consists of a series of partial stages, the tasks, which are connected by diverse control constructs, e.g. sequence, conditions, parallelism etc. Furthermore it describes who (which user) is permitted and able to handle the individual tasks and which data (forms, documents) are exchanged between the tasks.

The specification and the definition of business processes take place at the time of modeling.

At runtime the predefined process models serve as templates for concrete workflows. If there is no modeling in advance possible, for instance because the processes are unknown, this operation has to be done at runtime. In this case we call it *ad-hoc* workflow modeling.

1.3 Workflow

A workflow is a concrete operation (also called process or workflow instance or business case), which is based on a particular workflow specification (process description). Workflows are created at runtime when a workflow user selects a particular process (type) and instantiates (starts) it.

1.3.1 Ad-hoc Workflows

Ad-hoc workflows are processes, which are not predefined. They can be initiated and handled by the user at runtime depending on the situation. This is particularly the case if unforeseen situations take place, which the predefined workflow cannot deal with adequately. Ad-hoc elements can also be used to handle special circumstances in a predefined workflow in a flexible manner.

1.4 Task

A task is a step of a process, which is carried out by a certain workflow user (an agent). Each task has a name as well as other additional properties.

Three kinds of tasks can be distinguished:

- **Manual task:** A manual task is an unstructured step of a process whose handling is entirely controlled by the workflow-user, such as the handling of a telephone call or the writing of a letter.
Standard tools (e.g. word processing programs, spread sheet programs etc.) can be used to carry out the task.
- **Interactive task:** An interactive, automatic task is realized by a specific program (a user application), which is handled by the agent after the start of the task. This program can, for instance, present a form that the user has to fill in.
- **Non-interactive task:** A non-interactive, automatic task (batch task) is a task that is executed automatically and without user interaction by the workflow management system itself.

1.5 Agent

Agents are responsible for the execution of a task. The assignment of the agents to the tasks – mostly indirect through *roles* – is a constituent feature of workflow based process handling. This assignment usually is done along with the definition of new workflow specifications (but ad-hoc workflows can undertake the allocation at runtime).

The modeling and definition of agents are usually carried out in a separate user-modeling component. In *EPworX* it is done in the system administration component.

In general there are two different types of agents:

- The agent is a person, thus a specific workflow user.
- The agent is a machine, e.g. a computer system, a database management system (DBMS) or a specific program.

1.6 Role

A role is the logical name for a function or position within an organization (e.g. the role *clerk*, the role *sales manager* etc.).

- Roles are necessary in order to determine who are permitted to handle a certain task within a process.

For example: The logical user for the task *to render account* can be assigned to the role *bookkeeper*.

- A role can be given to many agents and an agent may have various roles.

For example: Mr. Huber and Ms Mitterer are assigned to the role *bookkeeper*. These two persons then are the possible agents for the task *to render account*.

- Roles are typically assigned in the context of organizational units in order to be able to use a certain role name, e.g. the role *clerk*, in multiple departments without interference.

Beside clerks in the division *purchase* there are of course also clerks in the division *marketing* or *distribution*.

Organizational units in *EPworX* have a hierarchical structure (i.e. an organizational unit can have several subordinated organizational units and at most one direct superordinated organizational unit).

EPworX offers a flexible concept of roles whereby it distinguishes between the following types of roles:

- **Global roles:** A global role is not assigned to an organizational unit and is particularly used to describe certain skills, e.g. speaks French.
- **Local roles:** A local role is a role that is assigned to one organizational unit and undertakes only jobs within this organizational unit, e.g. the role *secretary*.
- **Hierarchical roles:** A hierarchical role is assigned to a certain organizational unit like a local role but its scope of application is stretched across all subordinated organizational units.

This is necessary e.g. for managers who should not only be able to handle processes within their organizational unit but also in its subordinated organizational units.

When a user is given a local or hierarchical role, the organizational unit where the role is applicable must be stated, too.

1.7 Form

The exchange of information between tasks or processes takes place through structured HTML-forms as well as through any other documents.

Forms are based on HTML-format (Hyper Text Markup Language) that allows to display them with any WWW-browser.

Forms are structured, i.e. they can contain basic fields for text or numbers as well as complex fields such as tables, links to other forms or program calls.

The particular workflow user can enter values into the fields. All fields within a form can be given an access right. Values of the form fields can also be used in the definition of processes (e.g. to make automated decisions about the next task).

The process definition language supports the simple integration of form fields into the process description.

Besides the HTML-based forms there can be need for any other documents (e.g. a word processing document or a spreadsheet) to handle a workflow. *EPworX* offers simple integration mechanisms to handle such documents.

1.8 Worklist

Each workflow user who is defined in *EPworX* gets a worklist (much like an email inbox), which contains various functions in order to handle single tasks. The worklist shows all tasks that are being handled at the moment or have to be handled by the user. Through the worklist the user can access and change attached forms and documents and finish the tasks (send them along their way).

1.9 *EPworX*

EPworX belongs to the most recent generation of workflow management systems and is fully integrated into the internet.

The use of the system is intuitive and clear, which makes the everyday work with the system much easier. The major advantages of using the WFMS *EPworX* to control business processes are:

- **Specification:** The use of *EPworX* leads to a better specification of business processes like standard processes as well as less structured or predefined processes.
- **Documentation:** The use of *EPworX* leads to an accurate documentation of business processes and therefore contributes to the quality management and the process controlling. The analysis of process documentation generated by the workflow system is a substantial base for the improvement of business processes.
- **Turn-around:** *EPworX* helps to reduce the cycle time within administration to a great extent. Especially transport time and wait time can be reduced substantially.
- **Flexibility:** In contrast to traditional software, *EPworX* allows changing business processes dynamically and supports exceptional situations in particular.
- **Integration:** *EPworX* can also serve as a base for the integration of applications into a new overall process structure.

Specifically this system allows to integrate legacy systems into a new organization of business processes.

2. First Steps

2.1 Simple Example of Use

The following example is taken from the banking industry and illustrates a basic (and simplified) workflow for handling a credit application.

The example shows how the specification of this process can look like in *EPworX*, how the terms *role* and *organizational units* are applied in *EPworX*, and which functions are used in interacting with a workflow in *EPworX*.

2.1.1 Workflow Specification

Process: Credit application

The workflow *credit application* passes through the following steps:

1. If an application is being filed, the bank clerk (role *advisor*) starts the workflow *credit application*.
This process starts with the task *handle* and is put into the bank clerk's worklist. Attached to the task is the form *application* (a form of the type *credit application*). The data of the customer can be collected and handled electronically with this form.
2. After finishing the task, the process is passed over to the manager of the department (role *manager*). He decides in the task *approve* if a credit is granted or not.
3. An actor of the role *secretary* does the last step. He creates a rejection letter (task *refuse*) or a credit approval letter (task *grant*).

Representation in *EPworX*

In *EPworX* workflows are defined in the system administration. You will find a precise description of the used elements in the [system administration manual](#). The following brief description illustrates the elements of a workflow since we refer to them in some sections (see chapter [Process history](#)).

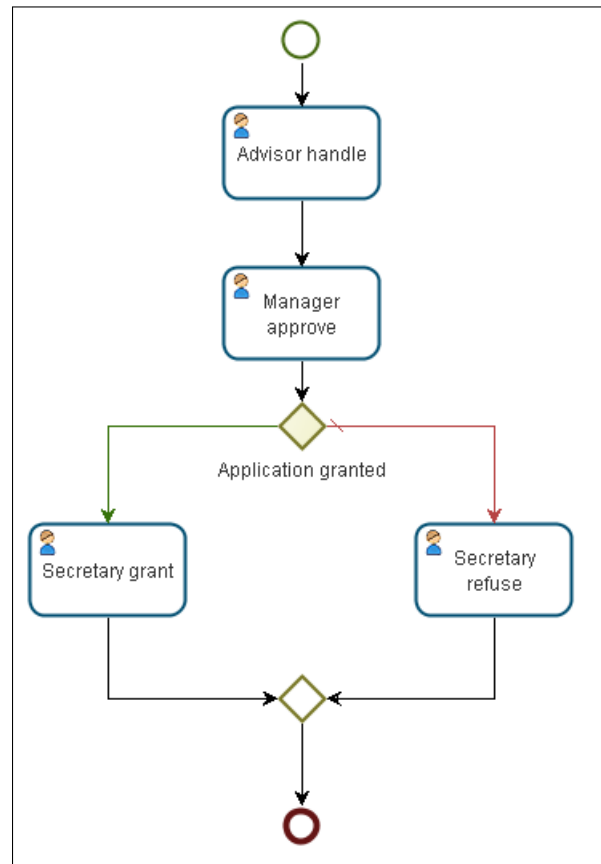


Figure 2.1: **Graphical Representation of the Workflow *Credit Application***

The following elements are used in figure 2.1:

- In *EPworX* a workflow specification always starts with the element *begin* and finishes with the element *end*. Between these two elements an arbitrary number of tasks or system steps etc. is possible.
- The elements with the user icons represent the tasks. They contain, among others, the name of the step (e.g. *handle*) and its actor (e.g. *advisor*).
- The diamond icon element *application.granted()* represents a condition. The WFMS checks if the application is granted or not. If the application is granted the workflow will go ahead along the green (left) line, if not it will follow the red (right) line.

2.1.2 Organization Chart

The process *credit application* involves multiple organizational units. Figure 2.2 visualizes the relationship between the organization (bank) and the workflow.

2. First Steps

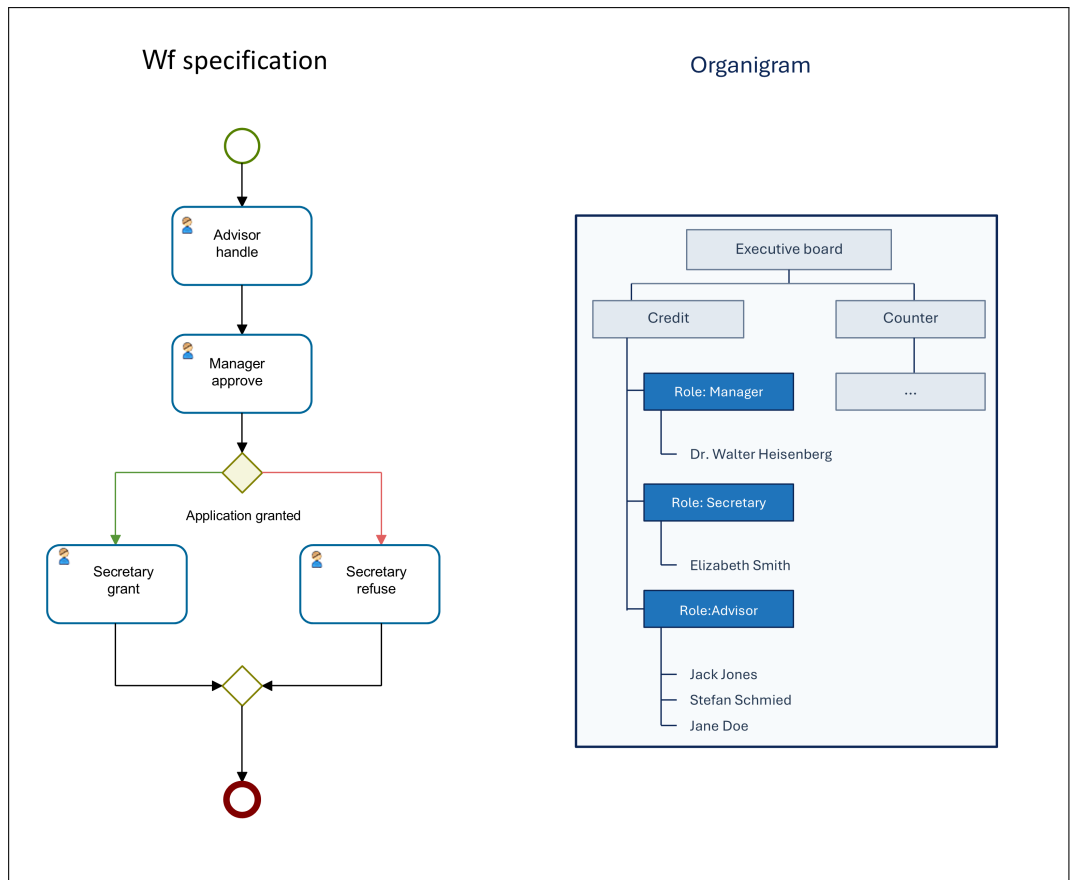


Figure 2.2: **Organizational Chart**

The left side of the figure presents the workflow specification. The right side shows the organigram of the bank. The workflow *credit application* can only be started by members of the role *advisor* of the organizational unit *credit*.

2.1.3 Workflow Execution

The example in figure 2.3 uses the process *credit application* to show the main functions of the execution of a workflow in *EPworX*.

The workflow *credit application* takes place in the organizational unit *credit*. It involves the roles *advisor*, *manager* and *secretary*.

1. Jack Jones (role *advisor*) initiates the workflow *credit application*. As a result the first task *handle* of this workflow appears in his worklist (WL).
Jack Jones edits the credit application of his client, fills in the attached forms and might attach additional electronic documents to the process.
2. Once he is done Jack Jones finishes this step using the function *Complete*. This passes the process on to the next user.

2. First Steps

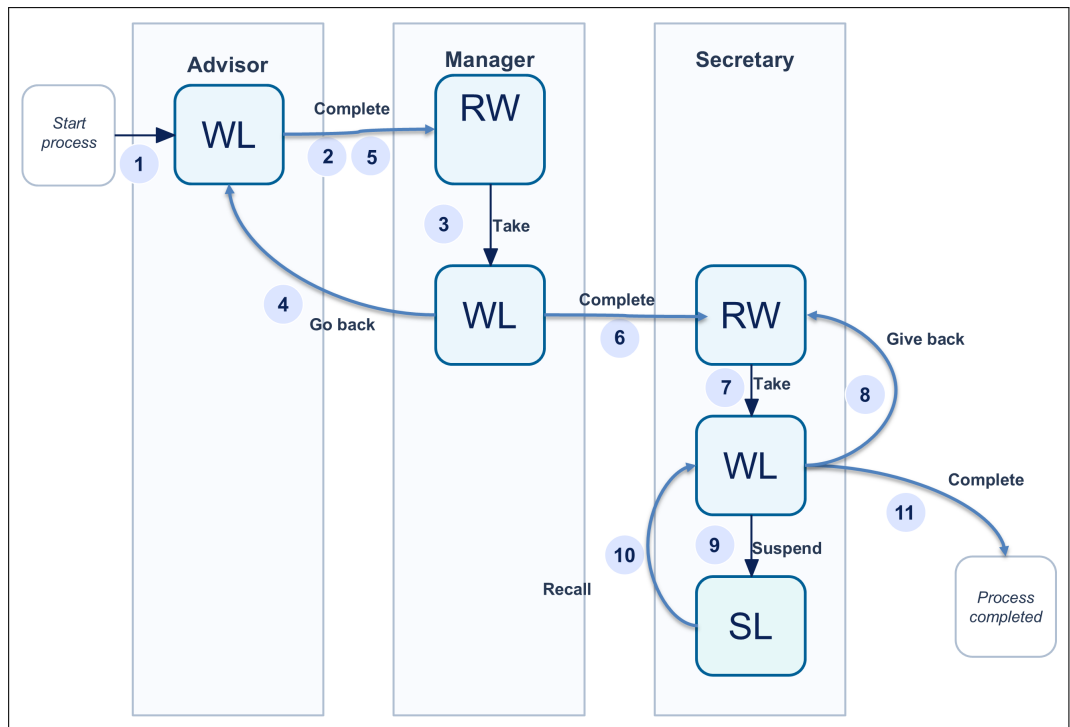


Figure 2.3: **Workflow Execution**

The next user has been defined in the workflow specification. In this example the process is being forwarded to the role–worklist (RW) of the role *manager* in the organizational unit *credit*.

3. Dr. Walter Heisenberg is a member of the role *manager* (see organizational chart) and wants to handle the next workflow step *approve*. Therefore he takes the process from the role–worklist by using the function *Take*. Thus the task appears in his personal worklist.

Dr. Walter Heisenberg can now grant or refuse the credit application. He has access to all documents, which were filled in or attached by Jack Jones.

4. Dr. Walter Heisenberg finds out that Jack Jones forgot to enter important information about the client. He uses the function *Go Back* to return to the previous step in the workflow (step one: *handle*).
5. Jack Jones once more finds the task *handle* in his worklist but now with the changes and remarks made by Dr. Walter Heisenberg. He fills in the missing form fields and again finishes this task with the function *Complete*.
6. Dr. Walter Heisenberg finds the task *approve* in his role–worklist and takes it. Since all necessary information has been provided, he can decide to grant or refuse the application. In this example he grants the credit application of the customer. Then he passes on the process to the next user by selecting the function *Complete*.

7. The process appears in the role–worklist of the role *secretary*. Elizabeth Smith sees the application and takes the task by activating the function *Take*.
8. Elizabeth Smith is being interrupted and recognizes that she doesn't have enough time to handle this task at the moment. She selects the function *Give Back* to put the task back to the role–worklist of the role *secretary*.
Later, Elizabeth Smith takes the task again by using the function *Take* and starts to handle it.
9. Elizabeth Smith needs additional information from Jack Jones to finish this task. She leaves a message for Jack Jones at his answering machine and puts the task to the suspension–list (SL) using the function *Suspend*.
10. After Jack Jones called back Elizabeth Smith takes the task back from the suspension–list by using the function *Recall* and finishes the task.
11. She passes on the process to the next user using the function *Complete*. Since it is the last step in the process *credit application* the workflow is finished (the case is closed).

2.2 User Interaction in *EPworX*

2.2.1 Web–Browser

The standard user interface of the WFMS *EPworX* is any World Wide Web (Web) –browser (Microsoft Edge, Mozilla Firefox, Google Chrome, etc.). The Web–browser displays complex information, which is provided by Web–servers.

The handling of your Web–browser is described in the user manual of the particular system. Some general features will be described here too.

2.2.2 Navigation Concept

The concept of hypertext is – from the user's point of view – the primary characteristic of the Web.

The Web–hypertext document can be any complex multimedia document (i.e. it can contain text, images, sound etc.). Additionally it can contain links (hyperlinks). Links are references to other documents or to other locations within the same document. If the user clicks on a link, the linked document will be loaded and displayed in the browser.

EPworX uses links not only to display specific information but uses them also to initiate operations (function calls).

When you click the workflow specific link, a certain function (i.e. a certain program) will be executed. Usually the function call updates the display as well.

2.2.3 Browsing

The usage of hyperlinks can lead to a situation where you are getting *lost*. To go back to a previously viewed page you can use the browser function *Back* once or multiple times. The complementary browser function *Forward* brings you to pages you just left by using the *Back* function.

This function can be invoked in two ways:

- Using the *Back* function in the toolbar of your browser.
- Using the right mouse button opens a context menu window, which contains the *Back* function.

2.2.4 Date Entry

The standard date format is: DD-MM-YYYY (day-month-year), for example: 10-12-2001.



Hint: The date format can be configured at the [system installation](#) and in the [system administration](#).

Calendar and time selection



EPworX provides a date entry assistant. You will find the calendar icon beside every date field.



If an additional field for time input is displayed, an assistant is provided in form of a clock icon beside the field.

By activating the icon a new window containing a calendar will appear (see figure 2.4). Here you can select any date and it will be copied into the date field in the correct format.

The calendar window contains following areas: At the top the month and year can be set. At the second area it is possible to select a day (e.g. 23).

Detailed description of the calendar features:

Saturdays, Sundays and holidays are printed in *red*, the current day is printed in *blue* and all other days are displayed in *black*.

Clicking on the day of the calendar closes the assistant and copies the selected date into the date field.

The calendar is being closed and the date field stays unchanged, if a single-click is made outside the calendar window.

Analog to date fields an assistant for entering time data is provided. By activating the icon a list of time entries is displayed (see figure 2.5). The list contains time entries in 15 minutes steps and by selecting an entry this time will be copied into the time field. Optionally the time can be entered directly without using the assistant.

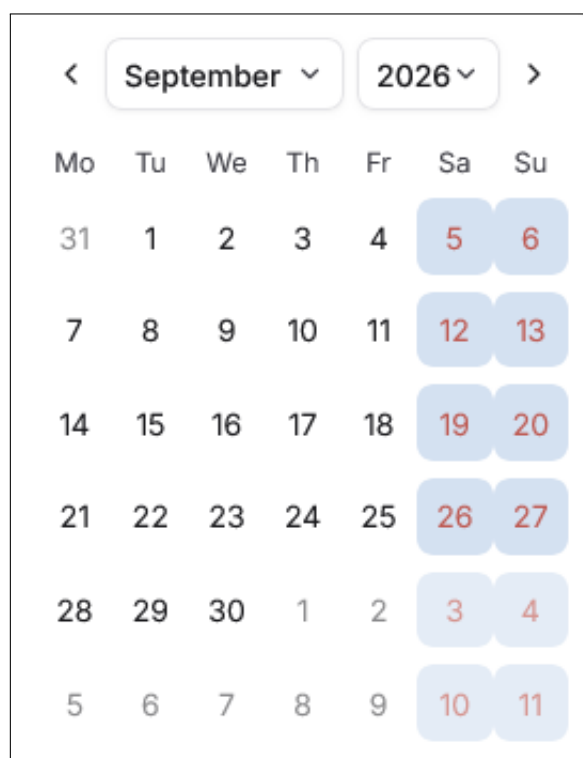


Figure 2.4: **Calendar**

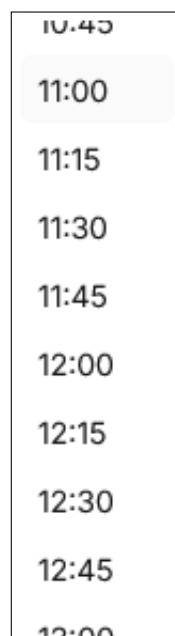


Figure 2.5: **Time selection**

2.2.5 Status Messages

The browser shows status messages in the status bar at the bottom of the window. It displays information like the address of a specific link or if the actual page is still loading.

2.2.6 Error Messages

If errors occur (e.g. invalid entries or execution errors) an error message including a *Back*-button will be displayed.

2.2.7 Common Functions

Button *Delete*

If you click *Delete* the currently edited object will be deleted. This button is available only if you are in the detail view of an object.

Ok* or *Save and Close

If you click this button all of your entries will be stored and the current dialog will be closed. In most cases this button is colored blue and indicates that this is the default action.

Apply* or *Save

If you click this button all of your entries will be stored and the current dialog will remain opened.

Cancel / Back

If you click this button all of your entries will be ignored and the current dialog will be closed.

2.3 Logging on to *EPworX*

In order to work with *EPworX* at first you need to start a WWW-browser.

After starting the browser there are three ways to get to the *EPworX* login window.

- Your browser is configured to start up with the *EPworX* login window.
- You load the *EPworX* login window yourself by selecting menu item *EPworX* from your bookmarks menu (*Favorites*).
- You load the *EPworX* login window yourself by entering the URL, which you have got from your system administrator.

2.3.1 Login Window

The login window (see figure 2.6) is used to enter your identification data which consist of two values:

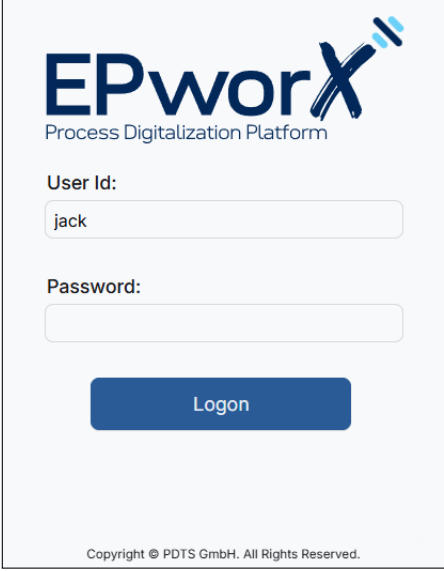
The image shows a login window for the EPworX Process Digitalization Platform. At the top is the EPworX logo with the tagline 'Process Digitalization Platform'. Below the logo are two input fields: 'User Id:' with the text 'jack' entered, and 'Password:'. Below these fields is a blue button labeled 'Logon'. At the bottom of the window, there is a small copyright notice: 'Copyright © PDTS GmbH. All Rights Reserved.'

Figure 2.6: **Login Window**

- **User-Id:** Here you enter your user identification (e.g. name, number etc.).
- **Password:** After entering your user identification you have to enter your personal password. This character combination is only known by you and the system. It ensures that only authorized users can access the system.

You confirm your input by activating the button *Logon*. The WFMS checks the entered data. If the data is correct the *EPworX* main window will be opened. Otherwise you get an error message (see figure 2.7) and you have to reenter your data.

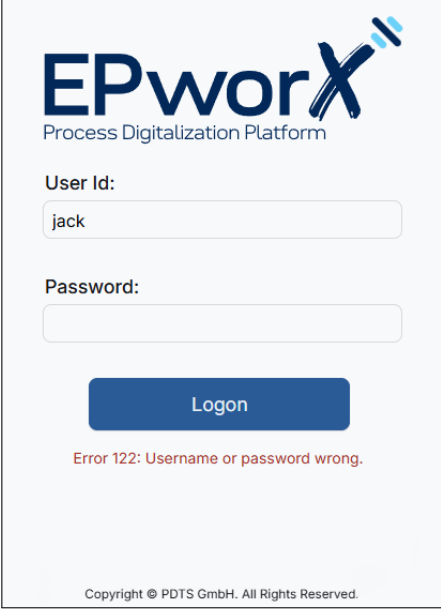
2.3.2 Main Window

After the successful login, the *EPworX* main window will be loaded. This window contains among others your personal worklist with functions you need to handle the workflows (of the various processes). The different components of the main window will be described in detail in chapter [EPworX User Interface](#).

2.4 EPworX User Interface

This chapter is a general introduction to the user interface of *EPworX* and its main components.

2. First Steps



The login form for EPworX, a Process Digitalization Platform. It features the EPworX logo at the top, followed by fields for 'User Id' (containing 'jack') and 'Password'. A blue 'Logon' button is positioned below the password field. A red error message, 'Error 122: Username or password wrong.', is displayed below the button. The footer contains the copyright notice: 'Copyright © PDTS GmbH. All Rights Reserved.'

Figure 2.7: Incorrect Login

The user interface consists of these areas: information area, toolbar, navigation area, and work area (see figure 2.8).

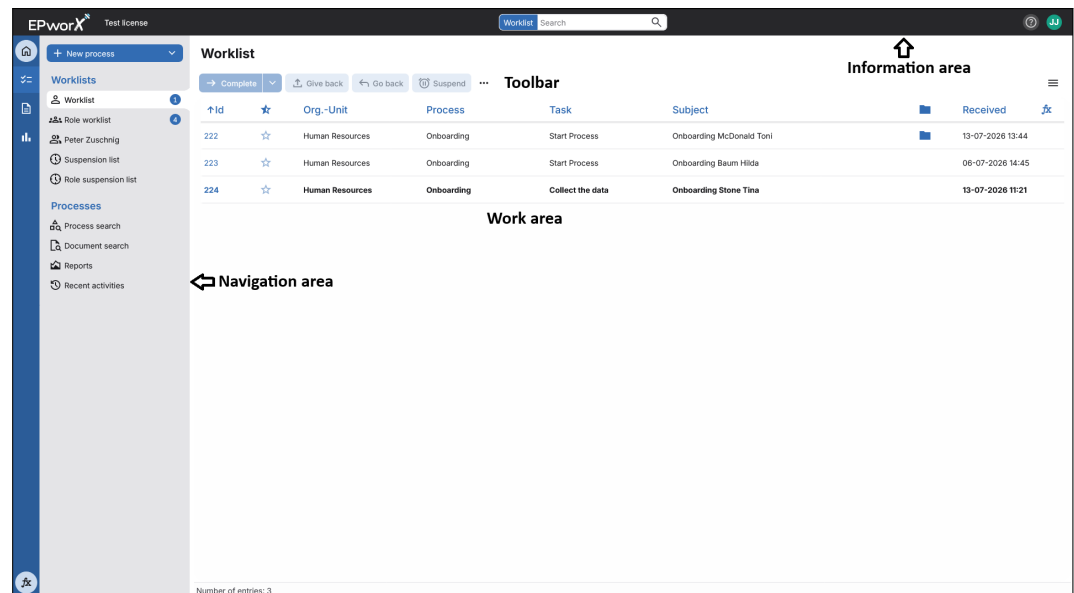


Figure 2.8: Design of the User Interface

- **Information area:** This area contains information about the current logged-in user incl. user profile and the search field. Each table/folder allows you to search



for table entries. Enter a text in the field and the table (or a folder) is filtered on the appropriate found entries.

To search for a phrase, put it in double quotes.

The information area also contains the *EPworX* help function, which opens a help page in a new window depending on the selected context (area). By selecting the same area and hitting the key *F1* the same help page is opened.

- **Toolbar:** The toolbar contains functions that can be applied to entries in the work area. It is also possible that there are no functions available in the toolbar.
- **Navigation area:** In the left part of the window, the navigation area is displayed. It contains the groups *Dashboard*, *Tasks* and *Documents*. Each group comprises components which belong together logically. The Navigation area is per default collapsed and can be expanded by clicking the individual groups.
- **Work area:** The work area is the main area in the *EPworX* user interface. Here the content of the actually selected entry of the navigation area is displayed. The layout of the work area can vary quite substantially with the specific content, and therefore relevant information can be found in the appropriate chapters.

2.4.1 Information area

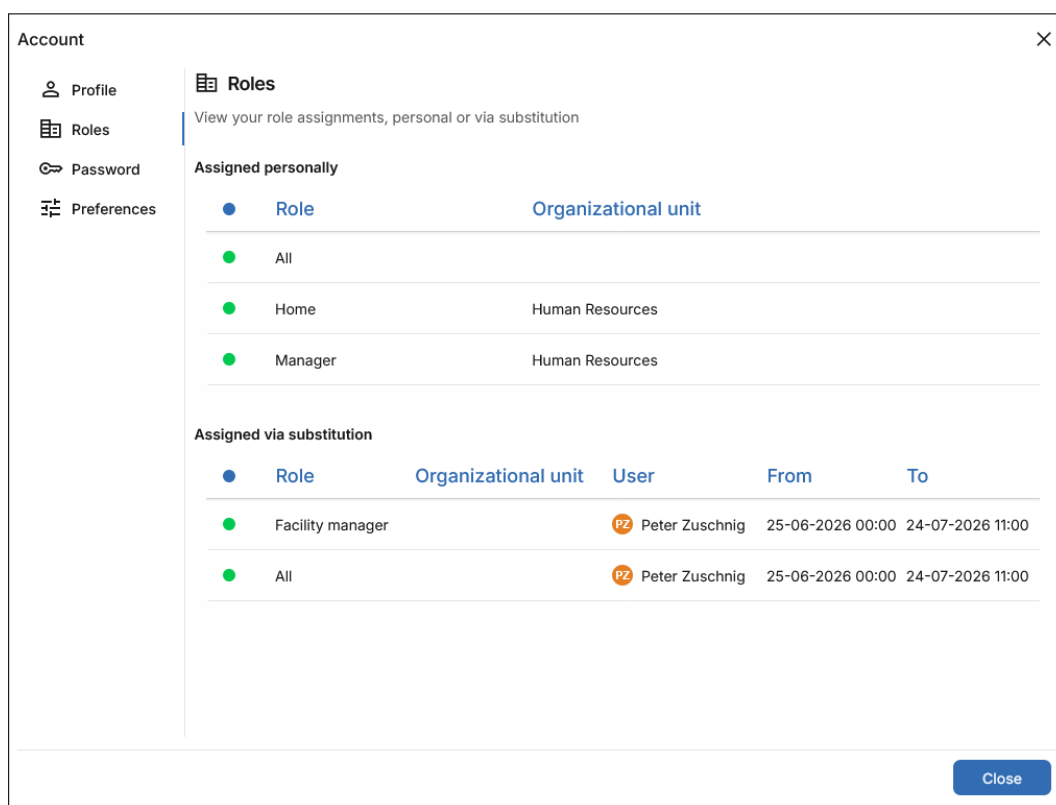
In this area information about the current server and the logged-in user can be found. Clicking on the user opens a dialog which contains a user profile. This profile consists of following data:

- **Surname:** The surname of current user which has been entered in administration.
- **First name:** The first name of current user which has been entered in administration.
- **Id:** The id of current user which has been entered in administration.
- **Organizational unit:** The Organizational unit which is assigned via Home-role to user object.
- **Email:** The email of current user which has been entered in administration. By activating the link the installed mail tool will be opened and the recipient is already filled.
- **Tel.-Nr.:** The telephone number of current user which has been entered in administration.
- **Select GUI configuration:** This menu item is displayed if more than one GUI configuration is assigned to the user. The assigned GUI configurations can be selected in a drop-down menu.
- **Function Account:** Here you can view information about your account, such as your profile or your assigned roles. You can also change your password and configure additional user settings.
- **Function Logout:** Log out of the system.

2. First Steps

Roles

The function *Roles* provides information about your assignment to roles and about role substitutions which concern you.



The screenshot shows a web interface for 'Account' with a sidebar containing 'Profile', 'Roles', 'Password', and 'Preferences'. The 'Roles' section is active, displaying a table of role assignments. The table is divided into two sections: 'Assigned personally' and 'Assigned via substitution'.

Assigned personally

Role	Organizational unit
All	
Home	Human Resources
Manager	Human Resources

Assigned via substitution

Role	Organizational unit	User	From	To
Facility manager		P2 Peter Zuschnig	25-06-2026 00:00	24-07-2026 11:00
All		P2 Peter Zuschnig	25-06-2026 00:00	24-07-2026 11:00

A 'Close' button is located at the bottom right of the window.

Figure 2.9: **Role assignments**

This page is divided into two sections:

1. The first section, called *Assigned personally*, lists all roles you are directly assigned to. Your role worklists contain all tasks that are assigned to those roles. This table also contains the organizational unit in which you have this role.
2. The second section, called *Assigned via substitution*, lists all roles you got due to a substitution. Tasks that are assigned to these roles will appear in the appropriate substitution worklist which is displayed in your navigation tree.

The table *Assigned personally* contains the following information:

- **Role:** A role assigned to you.
- **Organizational unit:** The role is valid in this organizational unit.

The table *Assigned via substitution* contains the following information:

- **Active:** Indicates, if a role is active (= green point) or inactive (= red point).
- **Role:** Name of the role you have got due to a substitution.
- **Organizational unit:** Name of the organizational unit in which you have got the corresponding role.
- **User:** Here you find the user whose role substitution you have got.
- **From:** This column shows the point in time when you start having the role substitution for this user.
- **To:** This column shows the point in time until when you have the role substitution for this user.

Settings

This dialog allows users to set specific settings for the current user. To save the settings, activate the button *Save* (the dialog will not close). The button *Close* allows closing the window and discarding any unsaved changes. For certain attributes, a refresh of the main page is required before the changes can be applied. After saving the dialog, a confirmation dialog appears that allows the user to refresh the main page.

The following attributes can be changed:

- Notification:
 - Choose how you want to be informed about new entries:
 - * Email notification: Receive notifications via email.
 - * Push notifications: Receive notifications through your desktop's notification system (e.g., Windows notifications). Note that permission is required for this option. When activated, your browser will display a confirmation prompt. This permission can be revoked at any time through the Privacy and Security section of your browser settings. If this method is unavailable (e.g., due to a lack of permission), a warning symbol will appear next to this option. Hover over the symbol for further details.
 - Choose when you want to be notified about new or removed entries:
 - * *Worklist*: Receive a notification as soon as a new entry arrives in your personal worklist or if the entry is aborted or removed by another user (e.g., using the "change agent" function).
 - * *Role worklist*: Be notified when a new entry arrives in your role worklist.
 - * *Only for selected roles*: Restrict notifications to specific roles. This type of notification can lead to a large number of emails and should only be selected in exceptional cases.
 - * *Substitution worklist*: Be notified when an entry arrives in or is removed from one of your substitution worklists.

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Preferences
Customize your experience

Notification

- Email notification
Receive notifications via email ☐
- Push notifications
Show browser alerts for notifications ☐
- Worklist
Notify me about new or removed entries in my worklist ☐
- Role worklist
New entry in role worklist ☐
- Substitution worklist
Notify me about new entries in worklists of substituted users ☐

Localization

Select a language
Set the display language used for labels, messages, and dialogs English/United Kingdom

Select a timezone
Use this timezone for dates, deadlines, and scheduling information

Other properties

Display hidden documents
Show documents marked as hidden in listings According to configuration

Save

Figure 2.10: **Settings**

- * *Only for selected users:* Restrict notifications to specific substitution worklists.
- Localization:
 - Select a language: Sets the language for the HTML interface of *EPworX*. After changing the language, a refresh is required.
 - Select a time zone: Defines the time zone used for date inputs and outputs. If no time zone is selected, the client's time zone (i.e., the operating system's time zone) is used. A refresh is required after changing the time zone.
- Additional properties:
 - Display hidden documents: This function allows users to toggle the display of files in the DMS that have a dot at the beginning of the name. Options include:
 - * According to configuration: Uses the setting from the option *Do not display hidden documents* (located in *Administration* → *Configuration* → *DMS*).

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- * Yes: Hidden documents are shown in the DMS.
- * No: Hidden documents are not shown in the DMS.

Content of the page *Password*

- **Last password change:** The date and time of the last password change is displayed.
- **Password policy:** Information about the defined password policy is displayed.
- **Current password:** Enter the current password here.
- **New password:** Enter the new password here.
- **Confirm new password:** Confirm your new password here.
- **Change password:** Clicking this button sets your password to the value of the field *New password*.

Account

Profile Roles Password Preferences

Password
Manage your password and view security policies

Last password change: 06-07-2026 14:41
Password policy: Your password will expire in 180 days. Deadline on 02-01-2027.

Your password must contain

- ✗ 8 to 30 characters
- ✗ At least 2 uppercase letter(s)
- ✗ At least 1 special character(s), e.g. !, @, #, \$

Current password

New password

Confirm new password

Change password

Close

Figure 2.11: **Password**

2.4.2 The Toolbar

The toolbar consists of following elements:

- Functions that can be applied to entries in the work area: To apply a function, first select one or several entries in the work area and then click on the corresponding icon at the toolbar. The function will be executed immediately except if the function needs additional information. In this case an HTML-form will be displayed in the work area where you can enter the necessary data.

The list of functions displayed in the toolbar depends on the selected entry in the navigation area, at some screens the toolbar can even be empty. You will find the relevant information in the appropriate chapters (see chapter [The Group Tasks](#)).

- Context menu: Following functions are provided:

- Refresh: By activating the *Refresh* icon the table can be reloaded.
- Reset: This icon resets the column widths and visibilities to default.
- Sorting: If provided, it is possible to change the sorting column and sorting direction.
- Columns: With this function it is possible to change the visibility of the columns.



2.4.3 Navigation area

The navigation area consists of different groups that determine the content of your work area. These groups are topics for the links inside. Activating an entry in the navigation area will change the content of the work area.

You will find a brief description of the entries and the links below. A more detailed description can be found in the corresponding chapters.

- **Dashboard:** Here you can see all of your tasks at a glance.
- **Tasks:** In this group you can find the following links:
 - *New process:* This link offers you the opportunity to start a new process.
 - *Worklist:* This link opens your personal worklist. It is the central component in your daily work with *EPworX*.

The worklist symbolizes the desk or the in-tray of the user respectively. All tasks that have to be done by a certain user are displayed in his worklist.

- *Role worklist:* This link opens your role worklist. It shows all tasks, which have been assigned to one of your roles.
- *Suspension list:* The suspension list shows all suspended tasks.
- *Role suspension list:* The role suspension list shows all tasks suspended for your roles.

- *Process search*: This function allows you to find process instances by using simple constraints.
- *Document search*: This function allows you to find documents of the document management by using simple constraints.
- *Reports*: This function contains predefined reports to locate processes.
- *Recent activities*: All process activities of the last month are listed.
- **Documents**: This group comprises links belonging to the document management system of *EPworX* (see chapter [The Group Documents](#)). The document management of *EPworX* supports the handling of documents that have been attached to a task and a process respectively. Of course it is also possible to handle documents that are neither attached to a task nor to a process.

This group contains the following links:

- *Personal folder*: This link opens a folder containing the personal documents of the current user. In the navigation area you won't find the entry *Personal folder* but its labeled with the name of the current user e.g. *John Smith*.
- *Substitution folder*: This link opens a folder containing the personal documents of a user for whom the current user is a substitute. In the navigation area you won't find the entry *Substitution folder* but its labeled with the name of the substituted user e.g. *Peter Doe*.
- *Common*: This link opens a folder containing those documents that are shared by all users.
- *Recently used documents*: This link opens a folder containing those documents that have been used recently by the current user.
- **Functions**: This link opens a list of function names. These functions can be called by you directly.

2.4.4 The Work Area

The work area is the main area in the *EPworX* user interface. Here the content of the actually selected entry of the navigation area is displayed. The layout of the work area can vary quite substantially with the specific content, and therefore relevant information can be found in the appropriate chapters.

2.4.5 Column picker, Sorting and Filter

You can change the number of displayed columns by using the column picker. The column picker is placed, in the context menu, rightmost above the table. Activate the function and a popup-window containing the names of all actually visible and possible columns opens.

Already visible columns are displayed with a small check-mark. To add a new column to the table, activate a column name (without the check-mark). The table refreshes and the selected column is displayed. To remove a column from the table, activate a



2. First Steps

column name (with the check-mark). The table refreshes without the removed column. With menu item *Reset* changed column widths and visibilities are set back to default (according to XML definition).

A column contains following functions in column header:

- Sorting: You can change the sorting column and sorting direction by activating a column header. Which column and direction is actually used for sorting is marked by a small arrow left of the column name.
- Filter: By clicking on the filter icon a context sensitive filter menu with the following entries is shown:
 - Remove filter: If a filter for this column is set, this function removes the filter. If no filter is set, this function is not available.
 - Quick-Filter: All column values are listed here. Multiple values can be selected. The table is filtered according to the selected items. The number of filter matches is shown in brackets.



3. The Dashboard

After logging in, the dashboard is displayed. You can return to the dashboard at any time by clicking the  icon in the navigation area. The dashboard contains the most important information for keeping an overview on your tasks.

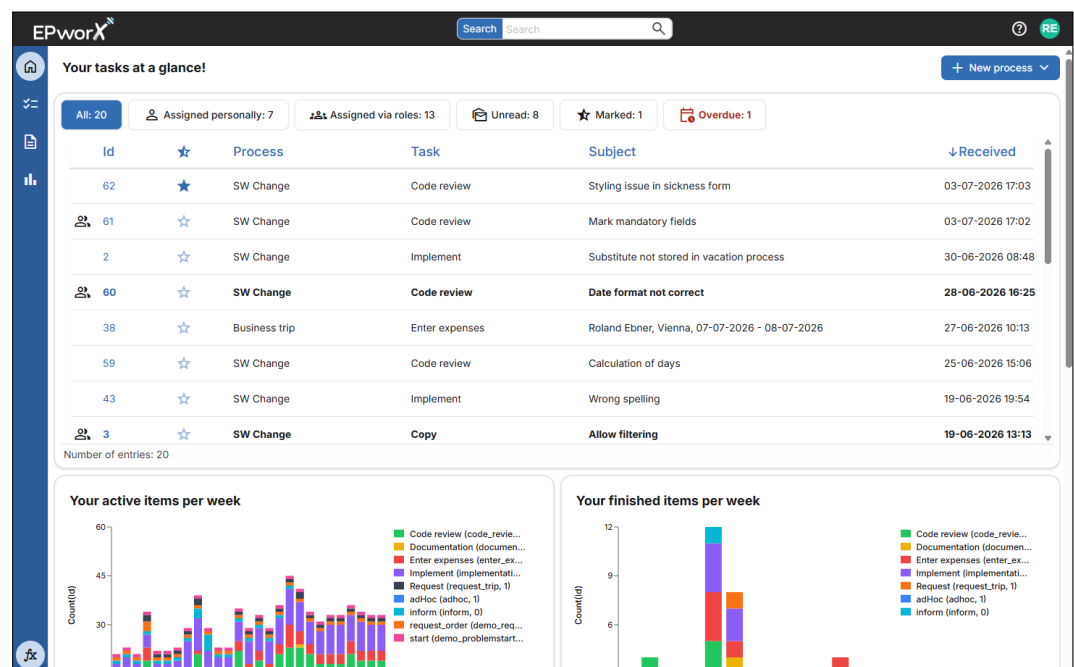


Figure 3.1: Dashboard Overview

The list can be filtered according to the following criteria:

- **Personally assigned:** Entries that are assigned to you personally.
- **Assigned via roles:** Entries that are assigned to you as a member of a group/role or as a representative of other users.
- **Unread:** Unread entries or entries marked as unread.
- **Marked:** Entries that have been marked with ★.

3. Dashboard

- **Overdue:** Entries whose due date has already passed. The entries are sorted by due date in descending order.
- **Due soon:** Entries whose due date is within the next three days. The entries are sorted by due date in descending order.
- **High priority:** Entries that have been assigned a priority. The entries are sorted by priority in descending order.
- **Received today:** Entries that were received today. The entries are sorted by receipt date in descending order.

To apply a filter, click the corresponding filter. The list is updated automatically. Categories that do not contain any entries are not displayed.

New Process

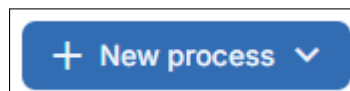


Figure 3.2: **New Process**

If no tasks have been assigned to you yet, you can start a new process here. Only processes that you are permitted to start are displayed.

Charts

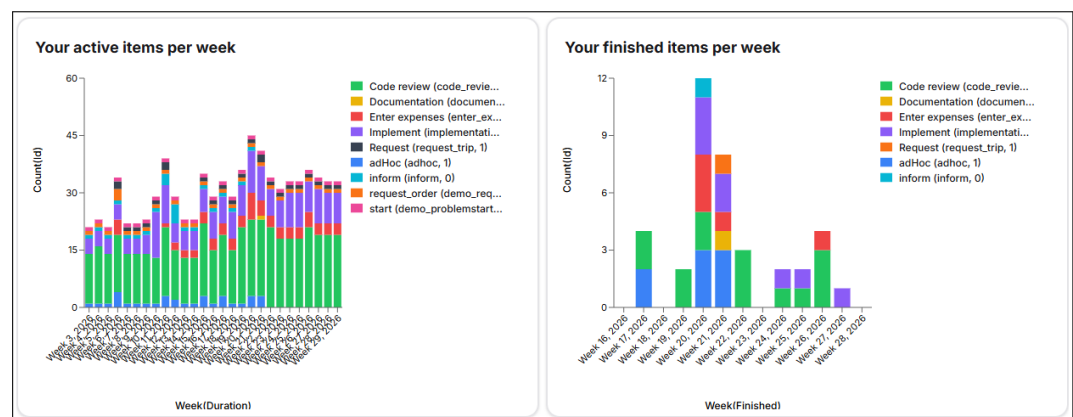


Figure 3.3: **Charts**

To provide a graphical overview of your workload, the dashboard contains two charts.

- **Your active entries per week:** This displays the number of active entries per week and per process type. Only directly assigned entries are taken into account.

3. Dashboard

An upward trend indicates that you have received more tasks than you completed in recent weeks. A downward trend indicates that you have completed more tasks than you received in recent weeks.

Clicking one of the bars takes you to a detailed list of the entries.

- **Your completed entries per week:** This displays the number of completed entries per week and per process type. Clicking one of the bars takes you to a detailed list of the entries.

Recent Activities

Recent activities			
	Id	Process	Subject
	38	Business trip	Roland Ebner, Vienna, 07-07-2026 - 08-07-2026
	5	Problem Mgmt.	abc
	59	SW Change	Calculation of days
	62	SW Change	Styling issue in sickness form
	31	SW Change	
	43	SW Change	Wrong spelling
	61	SW Change	Mark mandatory fields
	10	SW Change	Provide report subscriptions
	3	SW Change	Allow filtering
	2	SW Change	Substitute not stored in vacation process

Recently used documents		
	Name	↓ Recently ... Origin
	Migration Guide2	16-07-2026 14:08 Roland Ebner
	Expenses	16-07-2026 14:06 Process 5
	ep12UX-I	30-06-2026 16:21 Roland Ebner
	Analysis	30-06-2026 12:32 Process 10
	Images	30-06-2026 12:29 Roland Ebner
	Phone calls	30-06-2026 12:28 Roland Ebner/Customers
	test	30-06-2026 12:28 Process 5
	Acme	30-06-2026 12:26 Roland Ebner/Customers
	Notes	27-06-2026 11:17 Roland Ebner
	abc	26-06-2026 17:23 Roland Ebner/Customers

Figure 3.4: Recent Activities

The ten most recent activities that you have viewed or edited are displayed here. Clicking the 'Id' column takes you to a detailed view of the activity.

Recently Used Documents

The ten most recent documents that you have viewed or edited are displayed here.

4. The Group Tasks

The group *Tasks* comprises your personal worklist, your role worklist, your suspension list, the role suspension list and a possibility to start new processes.

In order to handle the content of the different entries of this group you can use functions and links displayed within your work area or in the toolbar.

4.1 Links of the Group "Tasks"

4.1.1 Worklist, Role worklist, Substitution worklists, Suspension list and Role suspension list

The worklist is the central component for the *EPworX* user. The worklist symbolizes the desk or the in-tray of the user respectively. All *tasks* that have to be carried out by you are displayed in your worklist.

EPworX distinguishes following types of worklists: your personal worklist, your role worklist, the substitution worklists, your suspension list and your role suspension list.



Hint: You can select the various worklists through the entries in the navigation area.

Structure of the worklist

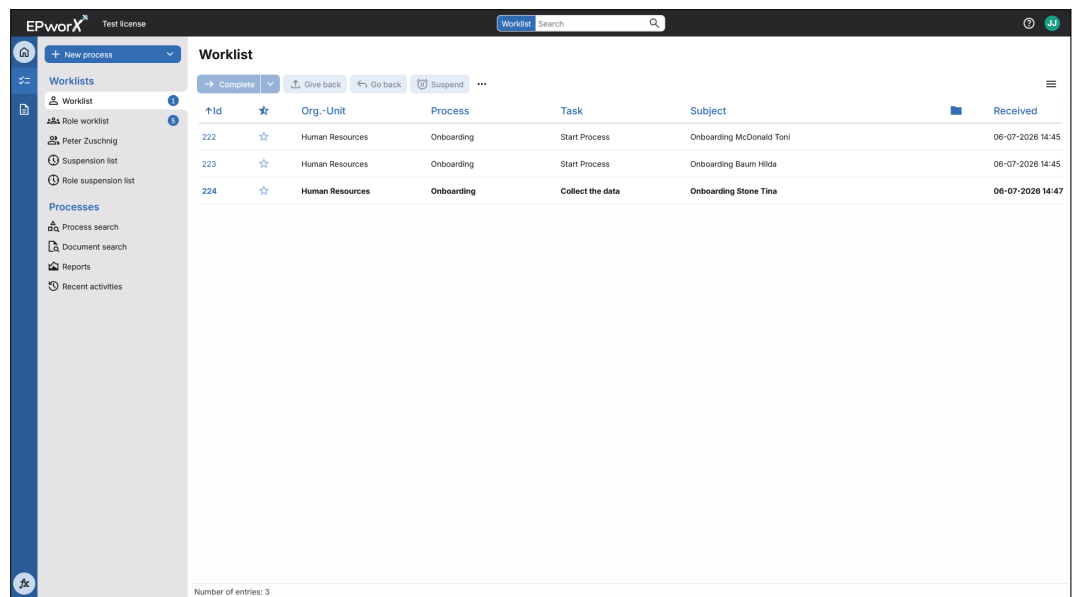
The personal worklist, the role worklist, the suspension list and the role suspension list are structured in the same way. If substitutions are defined, the personal worklists for substituted users are displayed as separate navigation tree entries. More information concerning substitutions are available in section [Roles](#) and the following pages.

The worklists are shown as a table (see figure [4.1](#)). The header of the table shows the type of the worklist (i.e. *Worklist*, *Role worklist* or *Suspension list*).

Each row in your worklist represents one entry. These entries correspond to the tasks you have to accomplish. Tasks printed in **bold** face are new entries that have not been handled so far.

Columns of the worklist:

4. The Group Tasks



The screenshot shows the EPworX Worklist interface. On the left is a sidebar with navigation options: Worklists, Processes, and Recent activities. The main area displays a table of tasks. The table has columns: Id, Org.-Unit, Process, Task, Subject, and Received. There are three tasks listed, all related to 'Human Resources' and 'Onboarding'.

Id	Org.-Unit	Process	Task	Subject	Received
222	Human Resources	Onboarding	Start Process	Onboarding McDonald Toni	06-07-2026 14:45
223	Human Resources	Onboarding	Start Process	Onboarding Baum Hilda	06-07-2026 14:45
224	Human Resources	Onboarding	Collect the data	Onboarding Stone Tina	06-07-2026 14:47

Figure 4.1: **Structure of the Worklist**

The columns of the worklist contain various functions and information of the listed tasks. Below you will find a detailed description of these functions and information.

- **Role:** This column only exists in the role worklist and role suspension list and contains the name of the role this task has been assigned to.
- **Id:** The Id is the unique identifier of the process instance to which the task belongs. This identifier can be a number or a text.
- **Mark:** The worklist entries can be designated as favorites by marking them with a star icon.
- **Org.-Unit:** Shows the actual organizational unit of the task.
- **Process:** Displays the name of the process to which the task belongs.
- **Task:** This column contains the name of the actual task.
- **Subject:** If a subject has been specified at the process definition it will appear here.
- **Priority:** This column contains the priority of a process relating to the current task.
- **Functions:** This column has no header and contains a link to additional functions that may have been associated with this task (see chapter [Task functions](#)). The function symbol is a link to these functions.
- **Documents:** Every task can have several *forms*, *documents* etc. attached to it. The document symbol is displayed when documents are available for a task.

4. The Group Tasks

- **Received:** The date shown in this column represents the date on which the task arrived at the worklist. Please note that the time zone of the user is used!
- **Due at:** Here you will find the due–date of this task (or process). This column can be empty. Please note that the time zone of the user is used!

The date is colour coded to indicate the urgency of the process.

- *Red:* The task (or the process respectively) should have been done by now (the due–date is in the past).
 - *Orange:* The task (or the process respectively) has to be accomplished today.
 - *Black:* This task is not urgent at the moment.
- **Suspended until:** This column only exists in the suspension list and shows until which point in time a task is being suspended. Please note that the time zone of the user is used!

4.1.2 New process

By activating this link it is possible to start processes with the *Quick start list*. All processes you are able to start are displayed. You can start all those processes in which you are entitled to handle the first task (e.g. because you are a member of the role associated with the first task).

The *Quick start list* is available by activating the triangle symbol beside the link *New process* in the group *Tasks* of the navigation area.

Quick start list

In this list all startable processes are displayed where you are allowed to start them. By selecting an entry the process will be started directly, Your personal worklist will be displayed (see chapter [Worklist](#), [Role worklist](#), [Substitution worklists](#), [Suspension list](#) and [Role suspension list](#)) and the first task of the started process will be in your worklist.

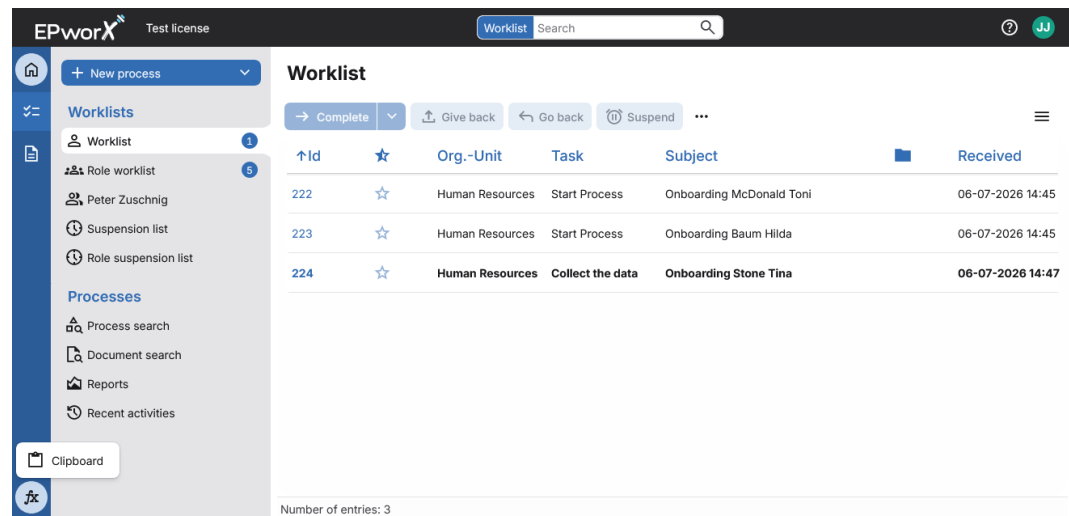
If e.g. no unique task can be determined for starting processes directly, the last step of the *Wizard for starting processes* will be displayed. In this case the *process start form* must be filled and the button *Start process* must be activated.

4.1.3 Functions

The function list shows all functions, which you can invoke.

You reach the function list by activating the homonymous link in the navigation area.

4. The Group Tasks



The screenshot shows the EPworX Worklist interface. On the left is a sidebar with navigation options: Home, New process, Worklists, Worklist (selected), Role worklist, Peter Zuschmig, Suspension list, Role suspension list, Processes, Process search, Document search, Reports, Recent activities, Clipboard, and a search icon. The main area is titled 'Worklist' and contains a table with columns: Id, Org.-Unit, Task, Subject, and Received. There are three entries in the table. Above the table are buttons for Complete, Give back, Go back, and Suspend. Below the table, it says 'Number of entries: 3'.

Id	Org.-Unit	Task	Subject	Received
222	Human Resources	Start Process	Onboarding McDonald Toni	06-07-2026 14:45
223	Human Resources	Start Process	Onboarding Baum Hilda	06-07-2026 14:45
224	Human Resources	Collect the data	Onboarding Stone Tina	06-07-2026 14:47

Figure 4.2: Function list

Structure of the *Function list*

The function list contains the name and the description (as tooltip) of every function. Furthermore it is possible to classify functions in so-called *Function groups* (see System Administration).

EPworX Functions

By default *EPworX* offers the following functions:

- **Clipboard:** A global version of DMS clipboard function. For more details see section [Clipboard](#).

4.1.4 Process Search

The process search allows you to find process instances you have been involved in as a user.

Select the function *Process search*. The HTML-page *Process search* (see figure 4.3) that can be used to narrow the search will be displayed in your work area.

The result of the search will be shown in your work area as a table (see chapter [Search result](#)). The entries of this table contain links to the process history of the corresponding process instances (see chapter [Process history](#)).

Hint: For process search a stored query with id *standard_search_template* exists (= template for process search) which can be adapted by an administrator (or a user with right *Statistic*). In this template e.g. the sort order of columns can be defined, predefined conditions can be set, other display attributes can be added, etc.



4. The Group Tasks

The screenshot shows a web form titled "Process search". It contains several input fields and dropdown menus for searching process instances. The fields are: "Id" (with a "Contains" dropdown and an input field), "Subject" (with a "Contains" dropdown and an input field), "Started" (with "From:" and "To:" date pickers), "Finished" (with "From:" and "To:" date pickers), "Due date" (with "From:" and "To:" date pickers and a "Process" dropdown), "Organizational unit" (dropdown), "State" (dropdown), "Marked" (dropdown), "User" (dropdown), "Application" (dropdown), "Task" (dropdown), and "Process type" (dropdown). There are also checkboxes for "Show time in date conditions" and "Ignore case". At the bottom, there are "Start search" and "Reset" buttons. To the right of the "User" and "Task" dropdowns, there are checkboxes for "Current user only" and "Current task only".

Figure 4.3: **Process Search – Search Criteria**

Content of the HTML–page *Process search*

- **Id:** Here you can specify the Id of the process instances you are looking for. The Id is the unique identifier of a process instance. You can select between following search options:
 - *Contains:* The entered string is available somewhere in the id to get a result.
 - *Starts with:* The entered string has to be available at the beginning of the id to get a result.
 - *Exactly:* The entered string must be equal to the id.
- **Subject:** Here you can enter the subject of the process you are searching for. You can select between following search options:
 - *Contains:* The entered string is available somewhere in the subject to get a result.
 - *Starts with:* The entered string has to be available at the beginning of the subject to get a result.
 - *Exactly:* The entered string must be equal to the subject.
- **Started:** Lists all process instances, which have been active within a certain time–interval. The time–interval can be set using the fields *From* and *To*.

4. The Group Tasks

- **Finished:** Lists all process instances, which have been finished within a certain time–interval. The time–interval can be set using the fields *From* and *To*.
- **Due date:** Due dates of processes or due dates of tasks of processes can be defined here as time–interval. The time–interval can be set using the fields *From* and *To*.
- **Organizational unit:** Here you can narrow the search to list only processes you handled within a certain organizational unit. As a default processes of all organizational units will be listed (empty field).
- **State:** There are two ways to restrict the search on the process state:
 - *Running:* Only running process instances will be displayed.
 - *Finished:* Only terminated process instances will be displayed.
- **Marked:** Refers to the categorization of processes based on user preferences.
 - *Yes:* The processes that have been designated as favorites will be displayed.
 - *No:* The processes that have not been marked as favorites will be displayed..
- **User:** Two cases can occur:
 - If the actual user has neither the right *View Processes* nor the right *Edit processes*, then no user can be selected for this field. Therefore the user can only search for *his own* process instances.
 - If the actual user has one or both of those rights for one or multiple departments, he can specify a user here. The search will be restricted to process instances of this specified user. If the user field is not being used to limit the search to a particular user, the result will contain the processes of all users he has the *View Right* for.
- **Current user only:** If this checkbox is activated and a user is selected, only process instances are displayed where this user is the current agent at this moment (not where user was agent).
- **Application:** Set the application to limit the search results to process instances of this application.
- **Task:** Here you can narrow the search to list only processes with a special task being active right now (in someone's worklist). As a default all tasks are considered (empty field).
- **Current task only:** If this checkbox is activated and a task is selected, only process instances are displayed where this task is active at this moment.
- **Process type:** Here you can narrow the search to list only a particular process type. As a default all process types will be displayed (empty field).

4. The Group Tasks

- **Show time in date conditions:** If this checkbox is activated, the datefields *Started* and *Finished* allow to enter date and time. This checkbox is activated by default, if the global parameter *Show time in date conditions* under *Administration* → *Configuration* → *Search* is set.
- **Ignore case:** Click this checkbox to do a case insensitive search.
- **Start search:** After defining the search criteria, the search can be started by clicking the button *Start Search*.
- **Reset:** Use this button to reset all search criteria to their default values.

Search result

After defining the search criteria and activating the button *Start Search*, the search result will appear in your work area.

Process search						
Refresh Result details Details of query Download						
↑ Id	Process	Subject	Active tasks information	Started	Due date	Finished
210	Onboarding (1)	Onboarding Musterfrau Sabine	Non technical hardware, Facility manager Provide accounts, IT infrastructure Provide work environment, Facility manager	01-07-2026 08:26		
211	Onboarding (1)	Onboarding Mustermann Max	Start Process, Linda Musterfrau	01-07-2026 08:27		
213	Onboarding (1)	Onboarding Grüber Thomas	Start Process, Linda Musterfrau	01-07-2026 12:58		
222	Onboarding (1)	Onboarding McDonald Toni	Start Process, Jones Jack	06-07-2026 14:45		
223	Onboarding (1)	Onboarding Baum Hilda	Start Process, Jones Jack	06-07-2026 14:45		
224	Onboarding (1)	Onboarding Stone Tina	Collect the data, Jones Jack	06-07-2026 14:46		
Number of entries: 6						

Figure 4.4: Search result

This HTML–page (see figure 4.4) shows a list of results displayed as a table. Each row of this table contains one process instance. The columns hold the following information:

- **Id:** The Id is the unique identifier of a process instance. The Id is linked to the process history of this process instance.
- **Process:** This column shows the process type (without version).
- **Subject:** This column holds the subject of this process instance.
- **Active tasks information:** If the process is in the state *Running*, this column contains the current tasks and the actors (first and last name).
- **Started:** This column displays the point in time (date and time) when the process was started.
- **Due date:** This column displays the point in time when the process should be finished (= process due date).

4. The Group Tasks

- **Finished:** If the process is not running any more, this column contains the point in time (date and time) when the process was finished.

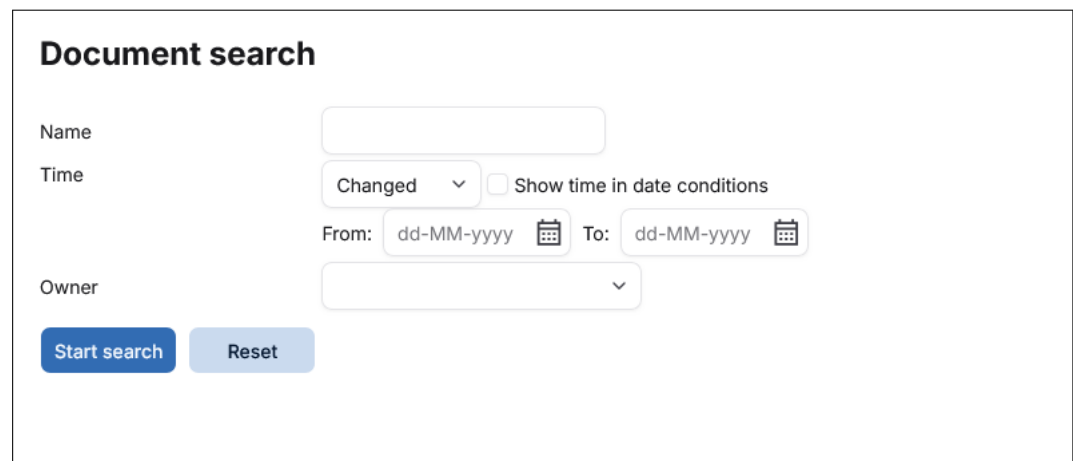
In the toolbar there are following functions:

- **Refresh:** If you activate this function, the search will be executed again with the already defined search criteria.
- **Result details:** This dialog shows the search criteria, which have been used and the number of matching process instances.
- **Details of query:** This functions allows a detail view of the query in XML- and SQL-format.
- **Download:** With this function you can download the search result as XLSX file.

4.1.5 Document search

This function can be activated by clicking on the link *Document search* in the navigation area.

With the function *Document search* it is possible to search for DMS–Objects within *EPworX* . With the help of the fields of the HTML–page *Document search* (see figure 4.5) it is possible to define some search criteria for the document search.



Document search

Name

Time ☐ Show time in date conditions

From:

Owner

Figure 4.5: **Document search**



Hint: For document search a stored query with id *doc_search_template* exists (= template for document search) which can be adapted by an administrator (or a user with right *Statistic*). In this template e.g. the sort order of columns can be defined, predefined conditions can be set, other display attributes can be added, etc.

Content of the HTML–page *Document search*:

- **Name:** The name of the document.
- **Time:** Define whether the time interval, specified with the help of the fields *From* and *To*, should correspond to the point in time when the entry has been created or to the point in time when it has been changed.
- **Show time in date conditions:** If this checkbox is activated, the datefields *From* and *To* allow to enter date and time. This checkbox is activated by default, if the global parameter *Show time in date conditions* under *Administration* → *Configuration* → *Search* is set.
- **From:** Begin of the time interval selected at *Time*.
- **To:** End of the time interval selected at *Time*.
- **Owner:** The owner of the entries.
- **Start search:** Clicking this button starts the document search. The result is displayed in your work area. The table of the search result is explained beneath.
- **Reset:** Clicking this button resets the entries of the fields within this HTML–page to their default values or removes the entries of the fields.

Result of the document search

The result table of the document search is displayed in figure 4.6.

Content of the HTML–page *Query Result*:

- **Toolbar:** The toolbar is analog to process search.
- **Name:** Corresponds to the entry *Name* of the DMS–Object–Table. If you click at an entry in this column the content of the document will be displayed.
- **Creator:** The creator of the DMS–Object.
- **Changed:** Point in time when the document has been changed the last time.
- **Folder:** The DMS–Object can be found in this folder. If you click at an entry in this column you change to the corresponding folder.

4.1.6 Example

Precondition: The document search is displayed, and you have already stored some DMS–Objects.

1. Activate the link *Document search* in the navigation area.
2. Enter the name of the DMS–Object you are looking for into the field *Name*.
3. Activate the button *Start search*. The search result is displayed in your work area.

4. The Group Tasks

Document search			
Refresh	Result details	Details of query	Download
↑ Name	Creator	Changed	Folder
Cafeteria email.eml	Jack Jones jack	13-07-2026 10:35	Jones Jack
manuals	Jack Jones jack	13-07-2026 10:32	Jones Jack
My first note	Jack Jones jack	13-07-2026 10:31	Jones Jack
profile picture.png	Jack Jones jack	13-07-2026 10:31	Jones Jack
user manual.pdf	Jack Jones jack	13-07-2026 10:32	manuals
Work notes.txt	Jack Jones jack	13-07-2026 10:36	Jones Jack
Number of entries: 6			

Figure 4.6: Query result

4.1.7 Reports

Here you can find reports which have been predefined by an administrator. By selecting an item and activating the toolbar function *Execute* (see figure 4.7) the corresponding query is executed. The result is displayed in the work area. Detailed information concerning this matter are available in the [Reporting](#) guide.

4.1.8 Recent activities

By activating this link a page will be displayed where all process activities of the last month are listed (see figure 4.8).

Furthermore it is possible to select the pre-defined filter "All processes" in the filter menu. "All processes" means that edited processes (e.g. user reassign, finished process step, etc.) and only viewed processes (= without changes by current user) are displayed where current user was involved.

In column *Activities* the text *Viewed* is displayed only, if no other activities for the process could be found for the last month or the process was viewed earliest on the day after the last editing.

4.2 Functions of the Worklist Component

The worklist component offers a variety of special functions, which allows you to edit a task (or process respectively) or to get additional information about it.

4. The Group Tasks

- Go back
 - Suspend
 - Reassign
- **Role worklist:**
 - Take
 - Suspend
- **Suspension list:**
 - Recall
- **Role suspension list:**
 - Recall
 - Recall and take

These functions will be applied to the entries of the worklist, i.e. tasks. To apply one of these functions to one or more entries, you have to select them first.

Further functions are available in the individual worklist tables via the **Functions** column.

4.2.1 Complete



This function can be activated by clicking on the icon *Complete* in the toolbar. At least one task has to be selected prior to activating this function.

Once you have finished a task, you can activate the function *Complete* to send it further along its way.

The WFMS checks if the task has been handled correctly by evaluating the optionally defined post condition for this task. If the post condition is met, the task will be removed from your worklist and the following task(s) will be triggered. If the evaluation of the post condition fails, a message appears and the task remains editable in your worklist.

If the actor of the following activity is a role, the task will appear in the role worklist of the members of this role.

Hints:

- When a task is completed, a version (back up) of every form will be generated automatically.
- You cannot cancel the operation once you activated the function *Complete*.



4.2.2 Complete and assign



This function can be activated by clicking on the icon *Complete and assign* in the toolbar. At least one task has to be selected prior to activating this function.

The function can be used to forward one or more finished tasks to an actor you can specify. After the execution of this function, the task will be removed from your worklist and appears in the worklist of the selected user.

If the actor of the following step has not been defined yet or the next step is assigned to a role, a new HTML-page will appear in your *work area* after activating this function. This HTML-page can contain one of the following information:

1. *Select agent*: This is the case if the following step has not been assigned to an actor yet. You can enter any user or role of the WFMS (see figure 4.9).
2. *User selection*: This is the case if the following step is assigned to a role. The possible actors for the following step are defined by the role (see figure 4.10).

Complete and assign

225 |

The task Start has been finished. Follower-Tasks:
Solve

Users Roles

Filter

	↑ Name	Id	Org.-Unit
●	RH Rollnig Hannah	hannah	PDTS
●	JJ Jones Jack	jack	Human Resources
●	RK Raphael Kollmann	raphael	PDTS
●	TM Thomas Müller	thomas	
●	LM Linda Musterfrau	linda	Human Resources
●	WM Walter Mustermann	walter	
●	PZ Peter Zuschnig	peter	

Number of entries: 16

Comment

Ok Cancel

Figure 4.9: Select agent

Content of dialog *Select agent*:

- **Users:** Select a user from the table to whom the process should be forwarded.
- **Roles:** Select a role from the table to which the process should be forwarded.
- **Filter:** Filters the table by the entered text.
- **Comment:** Free text for next agent.
- **Ok:** Click this button to confirm your entries and forward the process to the selected agent.
- **Cancel:** Activating this button leads in closing the dialog. The task is displayed in table *Complete not finished* (see section [Incorrect forwarding](#))

Complete and assign [X]

222 | Onboarding McDonald Toni

The task Start Process has been finished. Follower-Tasks:
Collect the data

Users

Filter

	↑Name	Id	Org.-Unit
●	JJ Jones Jack	jack	Human Resources
●	WM Walter Mustermann	walter	
●	PZ Peter Zuschnig	peter	

Number of entries: 3

Comment

Ok Cancel

Figure 4.10: **User selection**

Content of dialog *User selection*:

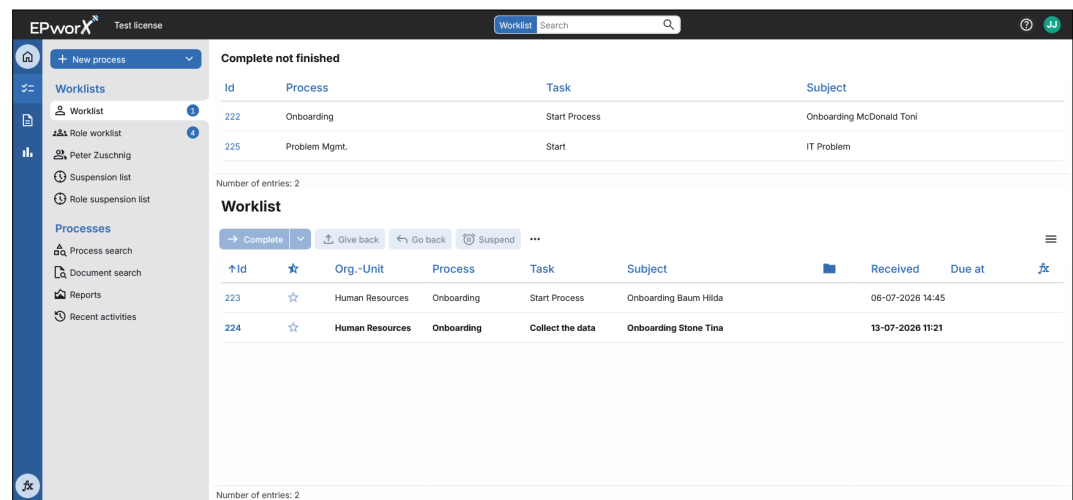
- **Users:** Select a user from the table to whom the process should be forwarded.
- **Filter:** Filters the table by the entered text.
- **Comment:** Free text for next agent.

4. The Group Tasks

- **OK:** Click this button to confirm your entries and forward the process to the selected user.
- **Cancel:** Activating this button leads in closing the dialog. The task is displayed in table *Complete not finished* (see section [Incorrect forwarding](#)).

Incorrect forwarding

If a task cannot be forwarded correctly to the next user, you will still be transferred to your worklist but a message will be displayed on top of your work area (see figure [4.11](#)).



The screenshot shows the EPworX Test license interface. On the left is a sidebar with navigation options: Worklists, Role worklist, Peter Zuschmig, Suspension list, Role suspension list, Processes, Process search, Document search, Reports, and Recent activities. The main area is divided into two sections. The top section, titled 'Complete not finished', contains a table with two entries:

Id	Process	Task	Subject
222	Onboarding	Start Process	Onboarding McDonald Toni
225	Problem Mgmt.	Start	IT Problem

Below this table, it says 'Number of entries: 2'. The bottom section, titled 'Worklist', contains a toolbar with buttons: Complete, Give back, Go back, Suspend, and a menu icon. Below the toolbar is a table with two entries:

Id	Org.-Unit	Process	Task	Subject	Received	Due at
223	Human Resources	Onboarding	Start Process	Onboarding Baum Hilda	06-07-2026 14:45	
224	Human Resources	Onboarding	Collect the data	Onboarding Stone Tina	13-07-2026 11:21	

At the bottom of the 'Worklist' section, it says 'Number of entries: 2'.

Figure 4.11: **Incorrect forwarding**

A table contains all tasks, which cannot be forwarded correctly. Click on an entry to be transferred to the previous HTML–page to specify the actor of the following step.

Hint: After activating the function *Complete and assign* there is no possibility to abort the function (process is shown in *Complete not finished* table. Not even the function *Back* of your browser will undo the effect of the function.

4.2.3 Give back

This function can be activated by clicking on the icon *Give back* in the toolbar. At least one task has to be selected prior to activating this function.

It can be applied to every task in your worklist. It can be used to transfer a task, which has been taken from your role worklist, back to the role worklist. This can be useful when a task has been taken accidentally or when you want to give the task back to the role worklist for any other reasons.

If you are the direct actor of the task or if you handle the start task, the execution of this function will not be possible.

4. The Group Tasks

Hints:

- The data in the forms and documents attached to this task will not be changed by this function.
- **Cancel:** You cannot cancel the operation once you activated the function *Give back* (but you can try to take it again).

4.2.4 Go back

This function can be activated by clicking on the icon *Go back* in the toolbar. Exactly one task has to be selected prior to activating this function.

The function allows you to return to a previous task within the running process. This can be necessary when you cannot complete the task because incorrect data has been entered in a previous task.

When you activate this function, the HTML-page *Go back* (see figure 4.12) will be displayed in your *work area*. Select the task you want to return to from the list of previous tasks.

Agent	Task	Started	↓Finished
JJ Jones Jack	Collect the data	06-07-2026 14:47	13-07-2026 11:20
WM Walter Mustermann	Collect the data	06-07-2026 14:46	06-07-2026 14:47
JJ Jones Jack	Start Process	06-07-2026 14:46	06-07-2026 14:46

Number of entries: 3

Comment

Ok Cancel

Figure 4.12: **Go back**

EPworX removes the task from your worklist and puts the previously selected task in the personal worklist of the corresponding user. This user can now continue to handle the task.



Hint: A version of each form will be created when the function *Go Back* is executed. All documents will be kept. If compensation methods have been defined to the according tasks, they will be called.

Content of the HTML–page *Go back*:

- **Table of agents:** In this table all preceding actors of the process are listed in descending order (the first task is listed at the end). Select the entry to which you want to go back. The table contains the following information:
 - *Agent*: Is the name of the actor who has handled this task of the process.
 - *Task*: Contains the name of the task.
 - *Started*: Displays the point of time, the actor received the task.
 - *Finished*: Shows the point of time, the actor completed the task.
- **Comment:** Here you can put some information explaining why you had to go back to a previous task.
- **Ok:** If this button is activated, the task disappears from your worklist and appears in the worklist of the selected entry.

Hints



- **Cancel:** You can always cancel the operation by using the button *Cancel*. Your personal worklist will be loaded.
- **Error message:** If you forgot to mark the task you want to go back to, a message will be displayed after activating the *OK* button.

4.2.5 Suspend



This function can be activated by clicking on the icon *Suspend* in the toolbar. At least one task has to be selected prior to activating this function.

The function can be used to suspend tasks that are in your worklist right now. This can be useful when you have to wait for additional information to complete a task or when you want to defer the processing of the task until a later point in time.

After selecting the function *Suspend*, the HTML–page *Suspend* will appear in your work area (see figure 4.13). Enter the date until when the actual task should be suspended. The task will not appear in your worklist until the given date but can be found in the suspension list instead.

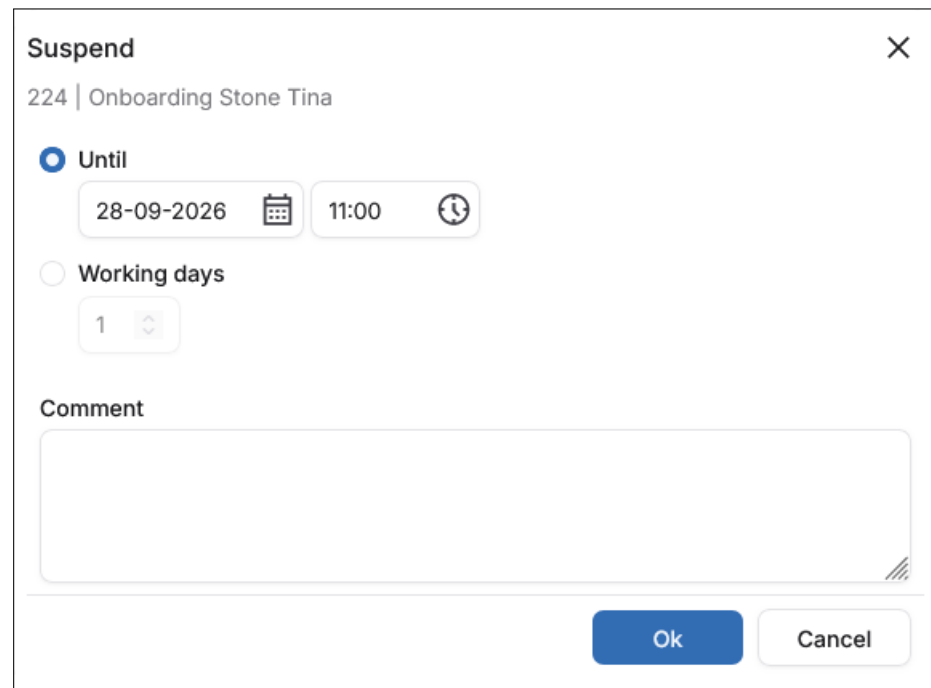


Figure 4.13: **Suspend**

Content of the HTML–page *Suspend*:



- **Until:** Enter the date until when the task should be suspended. The calendar assists you in entering the correct date. The radio button at the beginning of the line has to be ticked to use this field.
- **Working days:** Alternatively you can enter the number of working days the task should be suspended for. The radio button at the beginning of the line has to be ticked to use this field.
- **Comment:** Free Text.
- **Ok:** Clicking this button confirms the entry and the task will be suspended until the given date.
- **Cancel:** Clicking this button closes the dialog without any action.

The task appears automatically in your worklist when the entered date is reached. If you need to continue working on a suspended task before the entered date, you can use the function *Recall* in the suspension list (see chapter [Recall](#)).



Hint: You can always cancel the operation by using the button *Cancel*. Your personal worklist will be loaded.



4.2.6 Reassign

This function can be activated by clicking on the icon *Reassign* in the toolbar. At least one task has to be selected prior to activating this function.

The function enables you to temporarily leave the predefined path of the workflow and to insert additional steps. It allows you to define the next actor (user) of this task at runtime.

Activating this function loads the HTML–page *Reassign* (see figure 4.14), which allows you to react flexible to new situations that are not covered by the predefined process structure.

●	↑Name	Id	Org.-Unit
●	TM Thomas Müller	thomas	
●	LM Linda Musterfrau	linda	Human Resources
●	WM Walter Mustermann	walter	
●	PZ Peter Zuschnig	peter	

Figure 4.14: **Reassign**

Content of the HTML–page *Reassign*:

- **Users:** List of available users. If too much users are displayed enter the surname or id or the first letters of any of these attributes into the field *Filter*. After this only users who match with your entries are displayed in the user list. For users the state is displayed, if a user is online (= logged in and active), away (= still logged in, but not active) or offline (= logged out).
- **Roles:** List of existing roles. Here you can select the organizational unit in which a user holds the selected role.
- **Comment:** Add a comment for the selected agent.

- **Ok:** If activated, the task disappears from your worklist and appears in the (role-) worklist of the selected user/role.
- **Cancel:** The dialog will be closed without any actions.

4.2.7 Take



This function can be activated by clicking on the icon *Take* in the toolbar. At least one task has to be selected prior to activating this function.

After the execution of the function *Take* the task disappears from all role worklists (of this role) and appears in your personal worklist.



Hint: No additional data is needed to take a task. Therefore it is not possible to abort this function.

4.2.8 Recall



This function can be activated by clicking on the icon *Recall* in the toolbar. At least one task has to be selected prior to activating this function.

In the suspension list you will find all tasks, which have been suspended until a given date. If you need to recall one or more of these tasks before reaching this date use the function *Recall*.

The selected tasks will disappear from your suspension list and show up in your personal worklist instead.

Hints



- **Cancel:** You cannot cancel the operation once you activated the function *Recall* (but you can suspend the task again).
- **Notice:** When the date in the column *Suspended until* is reached, the corresponding task will be recalled automatically.

4.2.9 Recall and take



This function can be activated by clicking on the icon *Recall and take* in the toolbar. At least one task has to be selected prior to activating this function.

In the role suspension list you will find all tasks, which have been suspended for a certain role until a given date. If you need to recall and immediately put one or more of these tasks into your worklist before reaching this date use the function *Recall and take*.

The selected tasks will disappear from your role suspension list and show up in your personal worklist instead.

Example

Precondition: Your role suspension list is displayed and there is at least one task.

1. Mark the task by using the selection column in your role suspension list.
2. Select the function *Recall and take* in the toolbar. The selected task will reappear in your personal worklist.

Hints



- **Cancel:** You cannot cancel the operation once you activated the function *Recall and take* (but you can suspend the task again).
- **Notice:** When the date in the column *Suspended until* is reached, the corresponding task will be recalled automatically and therefore appear in the role worklist.

4.2.10 Edit form

When you open the details of a task (by double-clicking on a task in the worklist), the form (created in the system administration) will be displayed, if available. The process-form is shown in the first tab. The tabs *Documents*, *Notes*, *History* and *Process* will be explained in the following sections. Following buttons are available in the *form* tab:

- **Save:** Use this button to save your changes. You will stay in the form view.

If something has been changed in the form but not saved, an asterisk appears in the form tab beside the name. By activating the button *Save* the symbol disappears.



Hint: A form can only be edited by using the personal worklist. Opening the form view through the role worklist (or the suspension list respectively) only allows you to view the form. No changes can be made here.

4.2.11 To Document Management



To change to the document management of *EPworX* navigate to the *Documents* area in the detail view of a task or select the *Documents* button in the *navigation area*. The document management is explained in detail in chapter [The Group Documents](#).

4.2.12 To Note View



To change to the note view of *EPworX* navigate to the *Notes* area in the detail view of a task. Here you have the possibility to attach a note to the task, edit or delete it. Editing or deleting is only allowed for notes which got attached in the same process step (excepting private notes).

A special case of notes are the system notes which are generated automatically by *EPworX* (e.g. at abortion or reactivation of a process). This kind of notes are indicated by an appropriate icon and cannot be modified by the user.

4. The Group Tasks

4.2.13 Process history

The process history provides the detail view of one process instance. It shows all process steps a process has passed through. Additionally you can get information about who handled each task and how long it took to complete it. You will also find descriptions of the process versions.

The process history can be accessed as follows:

- By clicking the *Id* or double-clicking an entry in the search result, the detail view of the process will be loaded. Navigate to the *History* area in this detail view to display the process history.

Design of the process history view

The process history will be displayed in a separate dialog.

↑#	Step	Agent	Org.-Unit	Forms	Started	Taken	Finished
2	Start Process	JJ Jones Jack	Human Resources	Staff data	06-07-2026 14:45	06-07-2026 14:45	13-07-2026 11:17
3	Collect the data	WM Walter Must... JJ Jones Jack Would you be so kind to collect the data?	Human Resources		13-07-2026 11:17	13-07-2026 11:19	13-07-2026 11:21
4	Start Process	JJ Jones Jack WM Walter Mustermann Gone back You overlooked something	Human Resources		13-07-2026 11:21	13-07-2026 11:21	13-07-2026 11:23
5	Collect the data	WM Walter Must...	Human Resources		13-07-2026 11:23	13-07-2026 13:44	13-07-2026 13:44
6	Start Process	JJ Jones Jack WM Walter Mustermann Gone back	Human Resources		13-07-2026 13:44	13-07-2026 13:44	

Number of entries: 5

Close

Figure 4.15: Process History

Content of the HTML–page *History*:

- **Toolbar:** Depending upon the current process state several functions are offered here. These functions are described below in detail under *Functions of the process history*.

- **Course:** This is the real process history. It is explained in detail beneath.

Functions of the process history

In the process history the following functions are available:



- **Position in process:** By selecting a row in the table and activating this function a new dialog is opened showing the position of the selected step in the process image. The dialog is similar to the dialog in tab *Process* (see section [Process definition](#)).
- **PDF:** This function allows users to generate a PDF document containing a tabular representation of the process history. The content of the history, including details and changes, is customized based on the user's settings.
- Context menu **Settings:** By activating this function a dialog is opened where you can customize the display of the process history.
 - Standard context menu functions see section [The Toolbar](#).
 - **View:** By activating this function a dropdown dialog with the following options appears:
 - * System steps: If this checkbox is activated, all system steps, i.e. steps that were automatically handled by the WFMS, are displayed as well. These rows are displayed in a different font style.
 - * Form changes: If this checkbox is activated, all actor-made changes to the process forms are displayed for each step. The changes of the current step are always compared with the direct previous step. The comparison highlights differences between the two forms in color. To compare changes with other steps, you need to activate the corresponding form link and select the appropriate version for comparison in the *Changes* tab of the newly opened window. Changes on subforms are highlighted in different colors:
 - green row: subform entry has been added.
 - uncolored row: subform entry has been changed; the changes are visible directly in the columns.
 - red row: subform entry has been deleted.
 - * Document changes: If this checkbox is activated, all added/changed/removed DMS-objects per step will be shown. The DMS-objects are listed in alphanumeric order and are displayed as link which contains following elements:
 - Icon of the object, decorated with a small plus (= object added) or a small minus (= object removed). If a small pencil is displayed, then the object has been changed.
 - Name of the object.

4. The Group Tasks

By clicking on the name of the DMS object, its content at that time is displayed. The content at that time is the content that the user could last see before finishing their step, i.e., if the user changed the object multiple times in the same step, only the last change is displayed. If the user only added the object but did not change it, the content at the time of adding is displayed.

If the object is a form, not only the content at that time appears, but the *Changes* tab is also offered in this window. This allows comparing different versions (analogous to *Form changes*), whereby for each step only the last change made in it is listed for comparison.



Hint: For DMS objects with versioning strategy *Not automatically*, there are only entries for adding and removing, not for changes made. If in this case a DMS object link is clicked in the history, an appropriate hint appears in the newly opened window that the desired version entry is not available.

The following actions are considered relevant changes for the history:

- DMS object has been added, either by creating a new one or by moving/copying an existing object.
- DMS object has been removed, either by delete operation (recycle bin or finally) or by moving it to another process or folder of the DMS tree.
- DMS object has been changed.

Remark: Moving an object within the folder structure of the same process is not a relevant change for the process history.



Hint: The settings from the dropdown menu *View* are saved globally for each user, i.e., across all processes.

Course

The course lists all steps the process passed through so far. The current entry (from which the history has been opened) is shown in bold.

Each line represents one single step. The columns contain the following information:

- **Index (#):** Process history shows an unique row number for each step. The number does not change and can be used to reference certain entries.
- **Step:** This column shows the name of the process step.
- **Agent:** This column shows the name of the agent who handled this step.
- **Org.-Unit:** This column shows the organizational unit in which the step has been handled.

4. The Group Tasks

Process history							
Position in process		PDF					
↑#	Step	Agent	Org.-Unit	Forms	Started	Taken	Finished
3	Collect the data  Jones Jack Would you be so kind to collect the data?	 Walter Must...	Human Resources		13-07-2026 11:17	13-07-2026 11:19	13-07-2026 11:21
4	Start Process  Jones Jack Human Resources  Walter Mustermann Gone back You overlooked something				13-07-2026 11:21	13-07-2026 11:21	13-07-2026 11:23
5	Collect the data  Walter Must...	Human Resources			13-07-2026 11:23	13-07-2026 13:44	13-07-2026 13:44
6	Start Process  Jones Jack Human Resources  Walter Mustermann Gone back Documents: + notes.txt				13-07-2026 13:44	13-07-2026 13:44	
Number of entries: 5							
Close							

Figure 4.16: Course



- **Forms:** Here you find all forms (if available) that have been modified in the corresponding step. The form icon is a link to the version of the form. It can only be viewed but not edited.
- **Started:** This column shows the point in time (date and time) when this step was started.
- **Taken:** This column shows the point in time (date and time) when this step was taken.
- **Finished:** Here the point in time (date and time) of the completion of the step is displayed. If this field is empty, the step has not been completed yet.
- **Additional info:** This column contains additional information about a step (e.g. aborted, suspended, comment).

4.2.14 Process definition

The tab *Process* can be found via the detail view of a task. The detail view opens by double-clicking on an entry or by clicking on its Id.

This dialog displays additional information about the process and position in the process (see figure 4.17):

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Content of the HTML–page *Process*:

- **Name:** The name of the process definition.
- **Id:** The id of the process definition.
- **Version:** Each process instance has a version number, which can be found here.
- **Description:** The description for the process.
- **Process image:** A graphical representation of the process with the actual task being highlighted is displayed here. All relevant and active steps (= steps where user is not the current agent) will be marked by a dashed frame - the 'current' step is marked with a solid line (green=active step, grey=inactive step). By now relevant steps are: Task, Subprocess, Batch, WebService-Invoke, Webservice-Receive, Sync- and Wait-event.

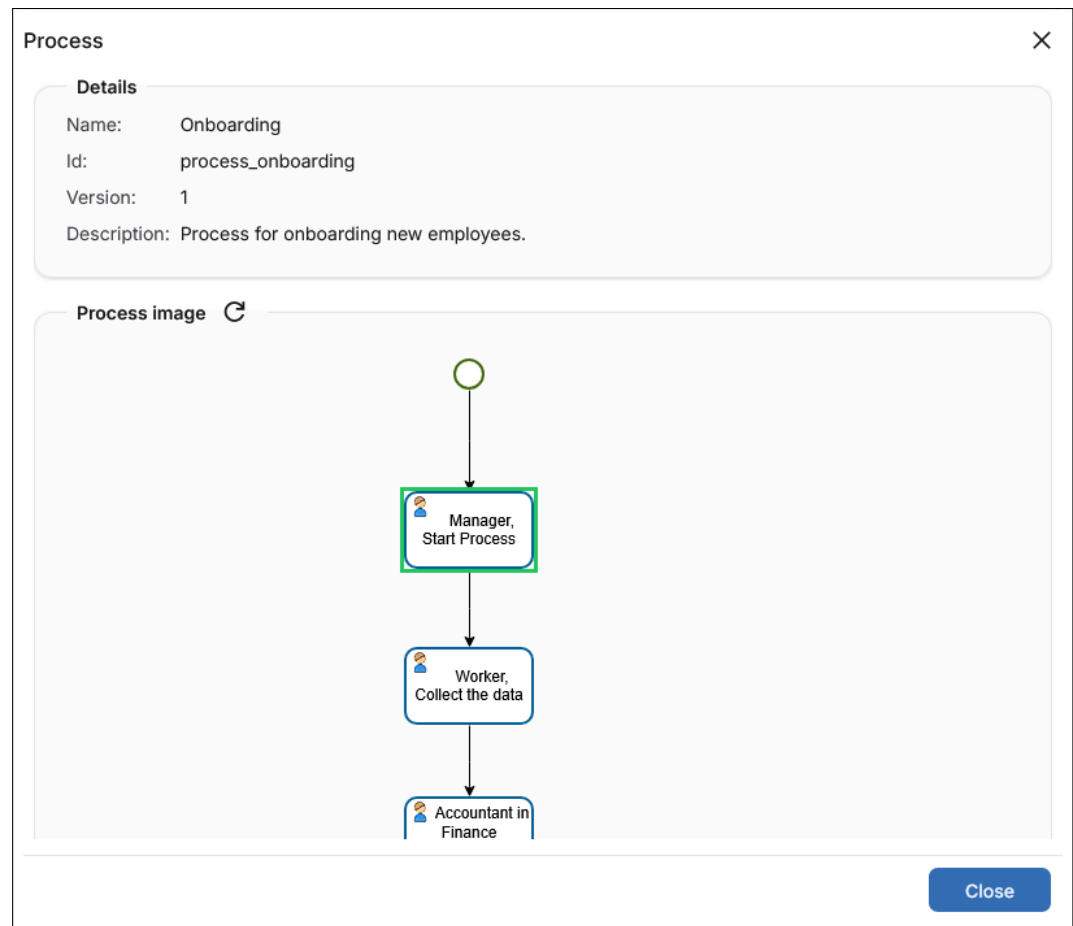


Figure 4.17: **Process definition**

4.2.15 Information area of a process

The information area is displayed at the right side beside the detail tabs. This area contains information about the current task and the process in general. The process information also includes three buttons that allow you to display the process definition, the history and the notes of the process. In addition, the document area is displayed in a minimized view, so that you can view the documents of the process directly. This area can also be displayed enlarged in a dialog.

4.2.16 Task functions

Each single task in your worklist has defined certain functions, called *task functions*. Task functions are e.g. setting a due date for a task or creating a copy of a task.

...

You can view the defined task functions by clicking the *function icon* in the column *Functions*. A context menu will appear which lists all available task functions.



Hint: Task functions are defined in the system administration and can therefore vary in kind and number. *EPworX* offers some task functions by default. These task functions will be shown in the appendix (see chapter [Task Functions in EPworX](#)).

5. The Group Documents

The group *Documents* supplies you with all functions of the document management system (**DMS**) of *EPworX* .

The document management can be recognized by the title of the table in the *work area*. Since documents can be added to tasks, the title of the table in the document management refers to the process (*Process folder XX*).

5.1 Concepts in Connection with the DMS

Document Management System (DMS) That component of *EPworX* which is responsible for the administration of *DMS-Objects* – also independent of processes.

DMS-Object an umbrella term for all kind of objects which can be handled with the DMS of *EPworX* (e.g. documents, forms, notes, etc.).

Form stands for a HTML-Form.

Document stands for any document (doc, xls, txt, pdf, ...) which can be described by metadata with the help of a HTML-Form.

Note stands for a special kind of form (contains only the fields *Subject*, *Content*) which can be used by the user to create notes.

Folder can be used to group DMS-Objects (analogous to folders of the file system).

Web link can be used to define a link onto a URL.

Process form stands for a form attached to a process.

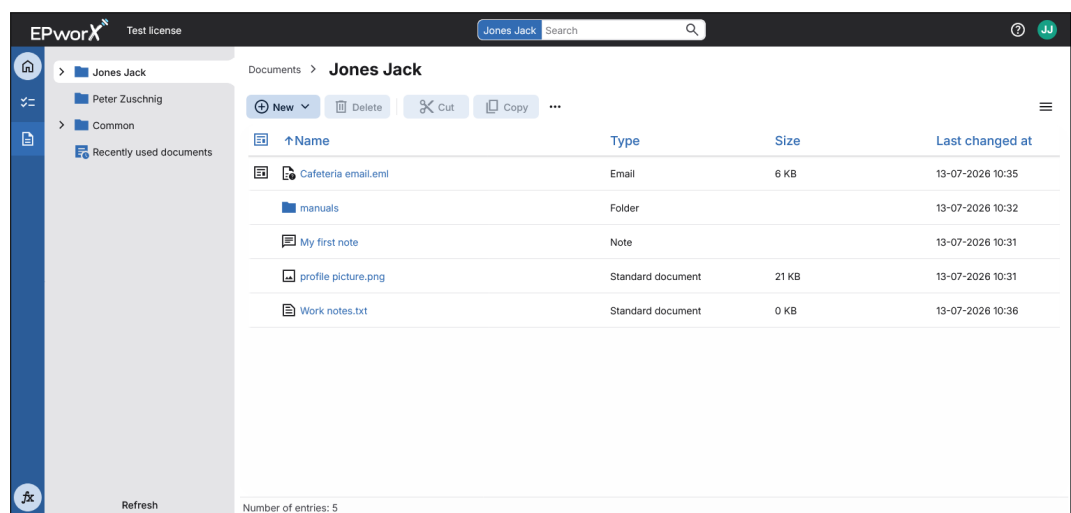
DMS-Object-Table stands for the content of the work area in the DMS of *EPworX* , after a Folder has been selected in the navigation area. This table contains all DMS-Objects stored within the DMS of *EPworX* .

5.2 Components of the Document Management

The document management in *EPworX* contains multiple elements. The main table is the *DMS–Object–Table*. It lists all documents that are within the selected folder. The *Properties* show additional information about a document. Multiple versions can be created for each document. The *Versions* Table lists the various versions of a document.

5.2.1 DMS–Object–Table

The document management of *EPworX* appears in your work area as the DMS–Object–Table (see figure 5.1). The rows of this table represent the documents that have been attached to a process.



Form	Name	Type	Size	Last changed at
	Cafeteria email.eml	Email	6 KB	13-07-2026 10:35
	manuals	Folder		13-07-2026 10:32
	My first note	Note		13-07-2026 10:31
	profile picture.png	Standard document	21 KB	13-07-2026 10:31
	Work notes.txt	Standard document	0 KB	13-07-2026 10:36

Figure 5.1: The Group Documents

Columns of the DMS–Object–Table:



- **Form:** This icon is a link to a form which holds additional data describing the corresponding document. It will be opened in a new browser window. Not all documents will have such a corresponding form.
- **Name:** This column contains the name of the document in *EPworX*. Click on this name to view the document in your work area or to save it (see chapter [Display DMS–Object](#)).
- **Type:** This column lists the name of the document type.
- **Size:** This column shows the size of the document in KB (kilo bytes).
- **Last changed at:** This column contains the point in time of the last modification of this document.



- **Created by:** This column shows the agent who created this DMS-object.
- **Last changed by:** This column displays the agent who changed this DMS-object as last.
- **Locked by:** This column shows the *lock icon* if the document is locked. The name of the user who locked the document is displayed as well.
- **Versions:** If versions of a versionable DMS-object already exist, a versions icon is displayed in this column.
- **Notes:** If notes have already been attached to a DMS-object, a notes icon is displayed in this column.

In addition to the known table functions (see section [Column picker, Sorting and Filter](#)) the DMS-Object-Table contains following special functions:

- **Breadcrumb trail:** This area displays the path to the current shown DMS folder. By activating an entry in the trail a superordinate folder will be displayed or by opening the dropdown menu another folder of the same folder-level can be selected.

5.2.2 Recently used documents



The *Recently used documents* folder is a storage location for 20 associated DMS-objects, which is displayed per user and is activated by default (see figure 5.2). If the folder already contains 20 entries, the oldest entry is deleted when a new one is inserted. Although the links of the documents are shown, the informations those links contain are from the original document.

Information of recently used documents:

- **Name:** This column contains the name of the document.
- **Recently used at:** This column contains the point in time when this document was used the last time (modified, seen etc).
- **Origin:** This column contains the information of the origin storage location of the DMS-object (DMS-folder, process instance).
- **Last changed at:** This column contains the point in time of the last modification of this document.
- **Type:** This column lists the name of the document type.
- **Size:** This column shows the size of the document in KB (kilo bytes).
- **Created by:** This column shows the agent who created this DMS-object.
- **Last changed by:** This column displays the agent who changed this DMS-object as last.

5. The Group Documents

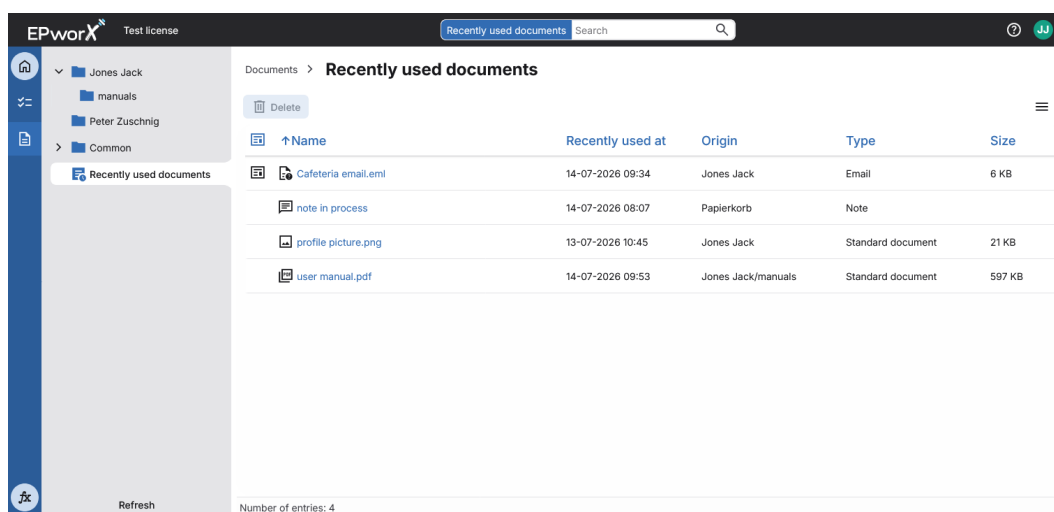


Figure 5.2: Recently used documents

The folder offers following toolbar functions:



- **Delete:** This function allows to delete entries from the list of recently used documents. This will NOT delete the referenced DMS-objects themselves, only the references to those DMS-objects will be removed from this list.

5.3 Functions of the Document Management

The document management offers a variety of functions to handle the documents. The functions can be found in the toolbar (see chapter [The Toolbar](#)) and in the DMS-Object-Table (see chapter [DMS-Object-Table](#)).

To execute such a function, one or more documents have to be selected. Each document in the DMS-Object-Table must have different names and extensions.

5.3.1 New



This function allows to create one of following DMS-objects:

- Folder
- Documents
- Forms
- Notes
- Web links

5. The Group Documents

EPworX offers standard types of folders, documents and forms. The administrator is able to create own types of folders, documents and forms which are displayed in the list. In following sections the creation of standard types is described in detail.

New folder

The function allows you to create new folders within the DMS.

After activating this function and selecting the DMS-element *Folder*, the dialog *Folder* will be displayed in your work area (see figure 5.3).

Figure 5.3: **Folder**

Content of the dialog *Folder*:

- **Name:** Enter the name for the new folder into this field. The name must not contain one of the following special characters:
/ \ : * ? < > "
- **Insert:** Clicking this button confirms your entries and the new folder will be inserted as subfolder of the currently selected folder. The DMS–Object–Table will be displayed in your work area.
- **Cancel:** Clicking this button leads in closing the dialog without creating a folder. The DMS–Object–Table will be displayed in your work area.

Example: Your personal dms folder is displayed.

1. Click the *New* icon in the toolbar and select entry *Folder*. The dialog shown in figure 5.3 will appear in your work area.
2. Enter the name for the new folder into the field *Name*.
3. Click the *Insert* button. The specified folder will be created and appear in the DMS as a subfolder of your personal folder.

New document

The function allows you to add new documents to the currently selected folder of your DMS.

After activating this function and selecting the DMS-element *Standard document*, the dialog *Standard document* will be displayed in your work area (see figure 5.4).

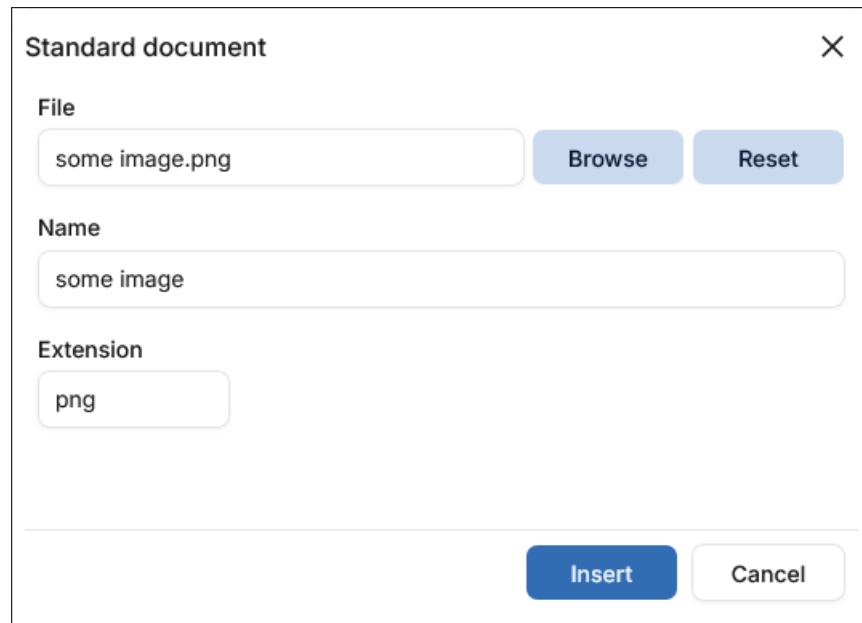
The image shows a dialog box titled "Standard document" with a close button (X) in the top right corner. Inside the dialog, there are three input fields: "File" containing "some image.png", "Name" containing "some image", and "Extension" containing "png". To the right of the "File" field are two buttons: "Browse" and "Reset". At the bottom right of the dialog are two buttons: "Insert" and "Cancel".

Figure 5.4: **Standard document**



Hint: If a document with same name already exists, it is possible to replace the document.

Content of the dialog *Standard document*:

- **File:** By clicking on the field you can choose a document you want to attach. Alternatively you can also use the button *Browse*.
- **Browse:** Use this button to display the dialog window *File Upload*, which helps you selecting the document you want to attach.
- **Reset:** Use this button to reset the field *File*.
- **Name:** Enter the name of the document, which the document should have within *EPworX*.
- **Extension:** Enter the file extension of the attached document (e.g. *html* or *doc*).

5. The Group Documents

- **Show form:** If this checkbox is activated, a meta data form of the document will be displayed after activating the button *Insert*. This checkbox is not available for standard documents.
- **Insert:** Clicking this button confirms your entries and the new document will be inserted in the currently selected folder. If checkbox *Show form* is not activated (or not available), the DMS–Object–Table will be displayed in your work area.
- **Cancel:** Clicking this button leads in closing the dialog without creating a document. The DMS–Object–Table will be displayed in your work area.

Example: Your personal dms folder is displayed.

1. Click the *New* icon in the toolbar and select *Standard document*. The dialog shown in figure 5.4 will appear in your *work area*.
2. Choose a file to be loaded via the field *File*.
3. Fill in the fields *Name* and *Extension*. The example uses the original file name. The field *Name* contains *example* and the field *extension* contains *txt*.
4. Click the *Insert* button. The specified file will be loaded into the WFMS and appear in the DMS.

Hints:



- **Error message:** If any field of the HTML–form has not been filled in, a reminder will be displayed after clicking the *Insert* button.

Email: A special type of uploading documents is the form type *Email*. The attributes *Recipient*, *Sender* and *Subject* are extracted of the email (eml- or msg-file) and stored in email form. After successful upload the details of the email (as known of an email client) could be opened by clicking the appropriate DMS entry.

EPworX supports mails created by *Microsoft Outlook* (msg-file). During the upload the file is converted for the *EPworX* email component. Outlook files contains possibly a RTF-body (Rich Text Format) which are converted by a OpenOffice converter. The path to an OpenOffice installation must be set by the administrator under *Configuration/DMS/OpenOffice home*. If no path is entered, the PLAIN-body is extracted only which is purely textual.

New form

The function allows you to create new forms within the DMS.

After activating this function and selecting the DMS-element *Form*, a dialog with the selected form type will be opened. By activating the checkbox *Show form* and the button *Insert* the form will be displayed before, otherwise the form will be created immediately.

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Depending on the elements of the form, fill in the fields and activate the button *Save and close* which inserts the form and shows the DMS–Object–Table again. The button *Cancel* closes the dialog and no form is created.

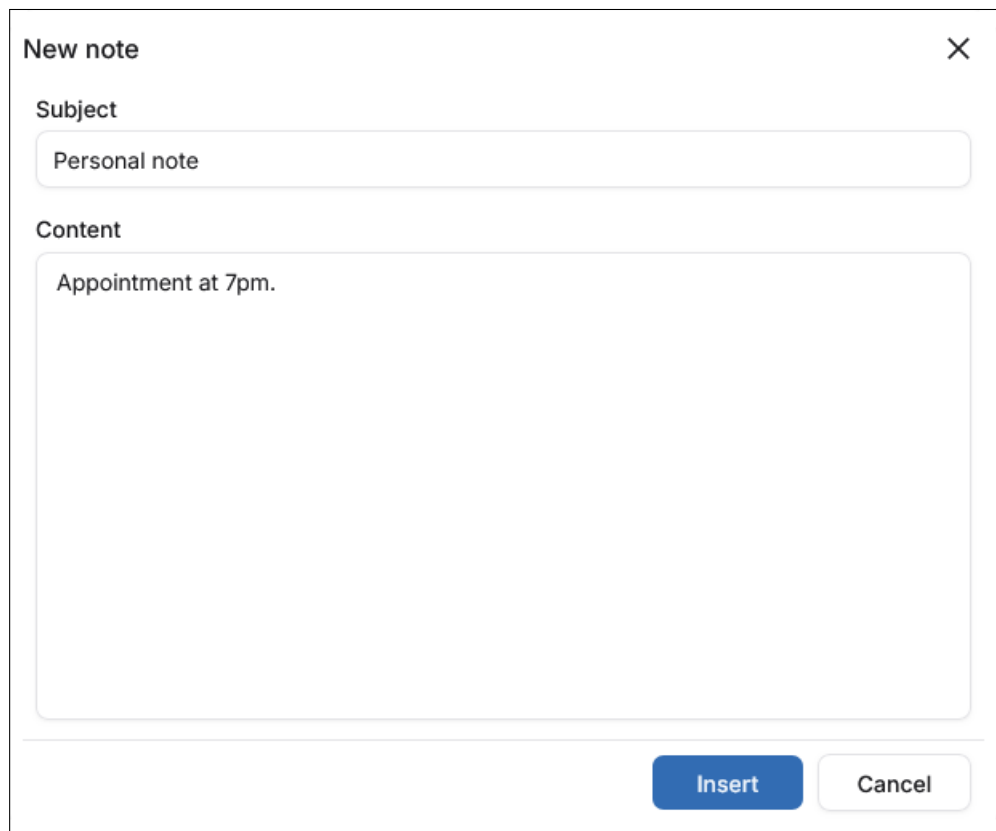
Example: Your personal DMS folder is displayed.

1. Click the icon *New* in the toolbar and select any form. A dialog with the selected form type will be displayed.
2. You can fill in the form fields and confirm your entries by clicking the button *Save and close*. Now the form will appear in your personal DMS folder.

New note

The function allows you to create new notes within the DMS.

After activating this function and selecting the DMS-element *Note*, the dialog *Note* will be displayed in your work area (see figure 5.5).



The image shows a 'New note' dialog box. It has a title bar with the text 'New note' and a close button (X). Below the title bar, there are two input fields. The first is labeled 'Subject' and contains the text 'Personal note'. The second is labeled 'Content' and contains the text 'Appointment at 7pm.'. At the bottom right of the dialog, there are two buttons: 'Insert' (blue) and 'Cancel' (white with a grey border).

Figure 5.5: **Note**

Content of the dialog *Note*:

- **Subject:** Enter the subject which should be assigned to the note. This subject is displayed in the column *Name* of the DMS–Object–Table.
- **Content:** Enter the content of the note.
- **Insert:** Clicking this button confirms your entries and the new note is added to the DMS–Object–Table which is displayed in your work area after the function has been executed.
- **Cancel:** Clicking this button leads in closing the dialog without creating a note. The DMS–Object–Table will be displayed in your work area.

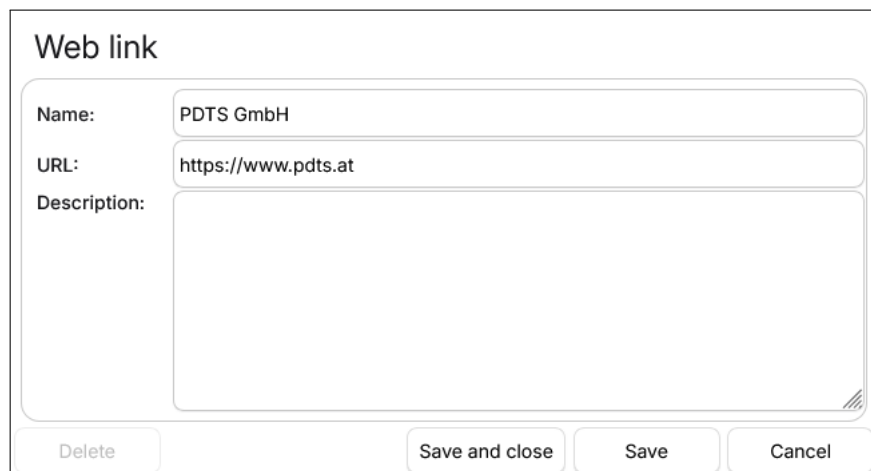
Example: Your personal DMS folder is displayed.

1. Click the icon *New* in the toolbar and select the entry *Note*. The dialog shown in figure 5.5 will appear in your work area.
2. Enter a content for the new note.
3. Click the *Insert* button. The new note is added to the DMS–Object–Table which is displayed in your work area

New web link

The function allows you to create new web links within the DMS.

After activating this function and selecting the DMS-element *Web link*, the dialog *Web link* will be displayed in your work area (see figure 5.6).



The screenshot shows a dialog box titled "Web link". It contains three input fields: "Name:" with the value "PDTS GmbH", "URL:" with the value "https://www.pdts.at", and "Description:" with a large empty text area. At the bottom, there are four buttons: "Delete", "Save and close", "Save", and "Cancel".

Figure 5.6: **Web link**

Content of the dialog *Web link*:

- **Name:** Enter here the name for the web link. It will be displayed in the column *Name* of the DMS–Object–Table.
- **URL:** The URL pointing to the web link.
- **Description:** Free text.
- **Delete:** This button is active for existing web link objects only and allows to delete the current object.
- **Save and close:** Clicking this button confirms your entries and the new web link is added to the DMS–Object–Table which is displayed in your work area after the function has been executed.
- **Save:** Clicking this button confirms your entries and the new web link is added to the DMS–Object–Table, but the form remains open.
- **Cancel:** Clicking this button leads in closing the dialog without creating a web link. The DMS–Object–Table will be displayed in your work area.

Example Your personal DMS folder is displayed.

1. Click the icon *New* in the toolbar and select entry *Web link*. The dialog shown in figure 5.6 will appear in your work area.
2. Enter a name for the new web link (e.g. PDTS GmbH).
3. Enter a URL for the new note (e.g. <https://www.pdts.at>).
4. Click the *Save and close* button. The new web link is added to the DMS–Object–Table which is displayed in your work area.

5.3.2 Delete



This function can be activated by clicking on the icon *Delete* in the toolbar. At least one item of the DMS–Object–Table has to be selected prior to activating this function.

The function *Delete* can be used to delete selected items of the DMS–Object–Table. Activating the function *Delete* shows a dialog window that asks the user to confirm the request.

Confirming this dialog window by using the *Delete* button moves the selected item to the recycle bin by default. The function can be aborted using the *Cancel* button in this dialog window.

After the execution of the function, the DMS–Object–Table will be displayed. If documents have been deleted, they do not appear in the DMS–Object–Table anymore.

Hints:



- One or more items can be deleted at once.
- If an item is not moved to recycle bin, i.e. deleted irrevocably (e.g. by pressing the SHIFT-key during deleting), the deletion of an item cannot be undone.
- Deleting an item also removes all versions of that item.

Example

Precondition: The DMS–Object–Table is displayed.

1. Mark the document you want to delete.
2. Select the function *Delete* in the toolbar. A dialog window will ask you to confirm the deletion.
3. Activate the button *Delete*. The selected document will be deleted.

5.3.3 Cut



This function can be activated by clicking on the icon *Cut* in the toolbar. At least one item of the DMS has to be selected prior to activating this function.



The function *Cut* can be used to move entries of a DMS folder into the clipboard of *EPworX*. Then you can use the function *Insert* to insert the entry of the clipboard into another DMS folder.

Hints:



- The entries inserted into the clipboard via the function *Cut* remain there until other entries are put into the clipboard via the functions *Cut*, *Copy* or *Link*, or until you flush the content of the clipboard with the activation of the function *Empty clipboard* which can be found in the clipboard.
- If the function *Cut* is not directly followed by the function *Insert* the entry which has been copied to the clipboard remains in the folder where the function *Cut* has been applied on it.

Example

Precondition: The DMS–Object–Table is displayed. It contains at least one document in your personal folder.

1. Mark the document you want to cut of your personal folder.
2. Activate the icon *Cut* from the toolbar. The document will be copied to the clipboard of *EPworX*.
3. Open the folder *Common* of your DMS.

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4. Activate the icon *Insert* in the toolbar. The document is removed from your personal folder and inserted into the folder *Common* of the DMS. The clipboard is empty.

5.3.4 Copy



This function can be activated by clicking on the icon *Copy* in the toolbar. At least one item of the DMS has to be selected prior to activating this function.



The function *Copy* can be used to copy entries of a DMS folder into the clipboard of *EPworX*. Then you can use the function *Insert* to copy the entry of the clipboard into another DMS folder.

For the destination directory of the function *Copy* you have two alternatives:

- The destination directory (the directory to which you want to copy the entry) is different from the source directory (the directory where you activated the function *Copy*). In this case the name of the file in the source directory and in the destination directory are the same.
- The destination directory and the source directory are the same. In this case the name of the copied file in the destination directory is *:Copy of 'File name'* (see figure 5.7).

↑Name	Type	Size	Last changed at
 Copy of user manual.pdf	Standard document	597 KB	14-07-2026 12:39
 user manual.pdf	Standard document	597 KB	13-07-2026 10:32

Figure 5.7: **Copy of ...**



Hint: The entries inserted into the clipboard via the function *Copy* remain there until other entries are put into the clipboard via the functions *Cut*, *Copy* or *Link*, or until you flush the content of the clipboard with the activation of the function *Empty clipboard* which can be found in the clipboard.

Example

Precondition: The DMS–Object–Table is displayed. It contains at least one document in your personal folder.

1. Mark the document you want to copy.
2. Activate the icon *Copy* from the toolbar. The document will be copied to the clipboard of *EPworX*.
3. Open the folder *Common* of your DMS.

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4. Activate the icon *Insert* in the toolbar. The document is inserted into the folder *Common* of the DMS. The copied document also still remains in your personal folder.

5.3.5 Insert



This function can be activated by clicking on the icon *Insert* in the toolbar.

The function *Insert* can be used to insert entries of the clipboard into an DMS folder of *EPworX*. As the case may be how the entries have been inserted into the clipboard (copy, cut, link) the function *insert* therefore finishes the respective function.

Thus the functions *copy*, *cut* and *link* are always connected with the function *insert*.

5.3.6 Replace



This function can be activated by clicking on the icon *Replace* in the toolbar. One item of the DMS–Object–Table has to be selected prior to activating this function.

The function *Replace* can be used to replace existing documents with new ones. This function does not change the name and/or extension but the content of the document. Activating this function displays the dialog *Replace document content* (see figure 5.8).

Replace document content

Work notes.txt

File *

different notes.txt

Browse Reset

☒ Create version

Comment

New content

Ok Cancel

Figure 5.8: Replace document content

Content of the dialog *Replace document content*:

- **File:** By clicking on the field you can choose a document you want to use for replacing the content of the selected document. Alternatively you can also use the button *Browse*.
- **Browse:** Use this button to display the dialog window *File Upload* which helps you selecting the document which should replace the current content of the document.
- **Reset:** Use this button to reset the field *File*.
- **Create Version:** If this checkbox is ticked, a new version of the document will be created, i.e. the selected file is uploaded first and then a version of the replaced document is created.
- **Comment:** Free text.
- **Ok:** Activating this button leads in closing the dialog and saving the selected document content is replaced by the selected file. The DMS–Object–Table is displayed again.
- **Cancel:** This button leads in closing the dialog without changes. The DMS–Object–Table is displayed again.

Example

Precondition: The DMS–Object–Table is displayed in your work area and it contains at least one document.

1. Mark the document you want to replace.
2. Select the function *Replace* in the toolbar. The HTML–form of figure 5.8 appears in your work area.
3. Choose the file whose content should replace the document.
4. Activate the button *OK*. The content of the document will be replaced by the content of the specified file. Then the DMS–Object–Table will be displayed.



Hint: If any field of the HTML–form has not been filled in, a reminder will be displayed after activating the *OK* button. In this HTML–form all fields have to be filled in.

5.3.7 Properties



With this function the properties of the selected document are opened. More information about the dialog can be found in section [Document properties](#).

5.3.8 Folder properties



This function can be found in the context menu. With this function the folder settings of the current folder can be opened. More information can be found in section [Document properties](#).

5.3.9 Clipboard



This function can be activated by clicking on the *Clipboard* function in the function list.

The function *Clipboard* can be used to display the content of the clipboard of *EPworX* (see figure 5.9). The clipboard is used during the execution of the functions *copy*, *cut*, *insert* and *link*. The combination of the functions *cut* and *insert* is called *move*. Thereby the selected items are put into the clipboard. Through the execution of the function *insert* the content of the clipboard is pasted inserted the corresponding folder.

The content of the clipboard changes with every execution of the functions *copy*, *cut*, *insert* and *link*. Thereby the content of the clipboard is replaced by the selected items to which the mentioned functions were applied to. Therefore it is not possible to add entries to the clipboard in multiple steps!



Hint: The system remembers by which function the item has been added to the clipboard. Through the function *insert* this function is completed. Therefore it is only possible to use items of the clipboard to create a link, if they have been added to the clipboard via the function *Link* (the same is true for the functions *copy* and *move*).

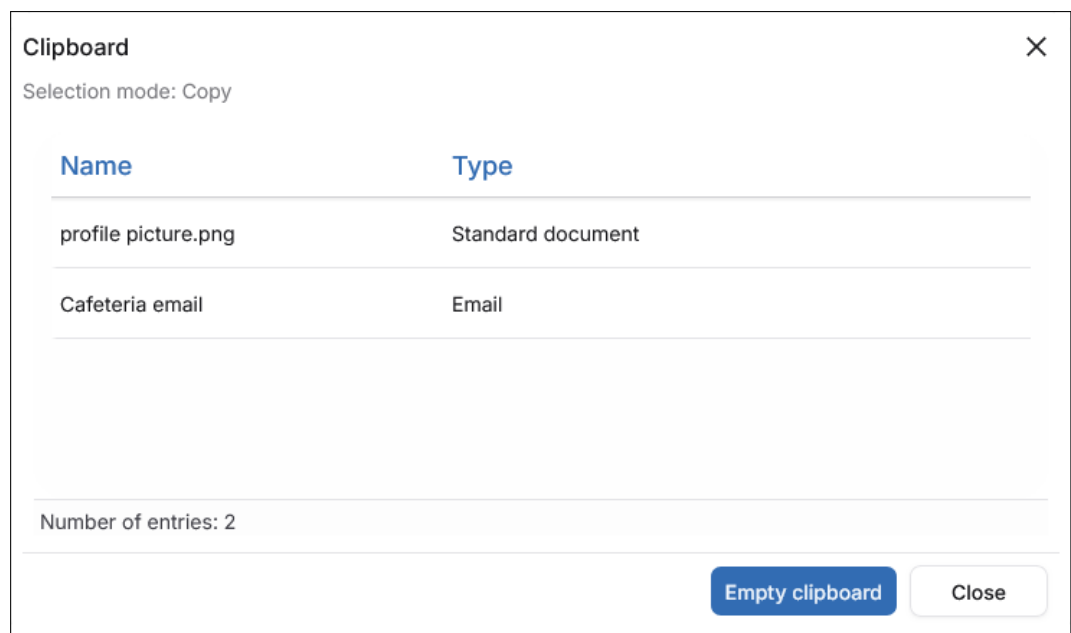


Figure 5.9: **Clipboard**

Content of the dialog *Clipboard*:

- **Table:** This table lists all items, which have been selected during the last execution of one of the functions *cut*, *copy* or *link*, and therefore been added to the

5. The Group Documents

clipboard. The clipboard may contain none, one or many entries. Columns of the table are:

- **Name:** The name of the document.
- **Type:** the type of the document.
- **Empty clipboard:** Clicking this button flushes the clipboard. The function cannot be undone.
- **Close:** Activating this button leads in closing the dialog without changes.

Example

Precondition: The DMS–Object–Table is displayed, and it contains at least one document.

1. Mark those documents which you would like to copy into another folder of your DMS.
2. Select the function *Copy* in the toolbar.
3. Select the function *Clipboard* in the toolbar. The clipboard is displayed and the former selected documents build the content of the clipboard.
4. Click the button *Empty Clipboard*. The clipboard is now empty.

5.3.10 Navigation

In this area it is possible to navigate in folder hierarchy of DMS and search for table entries.

The navigation function can be used to navigate from the current folder upward, along the folder hierarchy, to the folder above the current folder.

5.3.11 Refresh



This function can be activated by clicking on *Refresh* in the group *Documents* of the *navigation area*.

The function *Refresh* can be used to refresh the content of your work area or the content of the group *Documents* of the *navigation area*, depending upon where you activated the function.

If you want to refresh the content of the *navigation area* click on *Refresh* within the group *Documents* of the *navigation area*, otherwise click on the icon in the context menu.

Example

Precondition: The DMS–Object–Table is displayed.

1. Click on the icon *Refresh* in the context menu. The content of the DMS–Object–Table will be refreshed immediately.

5.3.12 Display DMS–Object

The function *Display DMS–Object* can be activated by clicking the column *Name* of an entry in the DMS–Object–Table.

If you click on an entry in this column, the content of the according document will be displayed in your work area or a dialog window asks you to save the document. You then can select where to save the document. The images are displayed in an image viewer.

Example

Precondition: The DMS–Object–Table is displayed, and there is at least one object in it.

1. Click at an entry in the column *Name* of the DMS–Object–Table. Relying on the type of the entry either the content of the object is displayed or you are asked to save the object on your local file system.
2. If the content of the object is displayed, activate the button *Back* of your browser. The DMS–Object–Table is displayed.
3. If you are asked to save the object, select the path and file name and activate the button *Ok*. Of course you are allowed to cancel the operation by activating the button *Cancel*. In any case the DMS–Object–Table will be displayed.

5.3.13 Document properties

You can access this area by selecting the desired entry in the table and executing the *Properties* function in the toolbar (see Figure 5.10).

The *Document properties* of a DMS–object shows its properties. It contains properties already shown in the DMS–Object–Table in more detail as well as additional information.

Content of the tab *General*: The representation depends on the DMS type of object.

- **Name:** The name corresponds to the one in the column *Name* of the *DMS–Object–Table*.
- **Extension:** This line contains the extension of the document (e.g. *doc* or *html*) and is visible only, if a document has been selected.

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The screenshot shows a 'Properties' dialog box with a close button (X) in the top right corner. Below the title bar, there is a tabbed interface with 'General' selected and 'Versions' as an alternative tab. The 'General' tab contains the following fields:

- Name:** A text input field containing 'Work notes'.
- Extension:** A text input field containing 'txt'.
- Type:** A label 'Type:' followed by the text 'Standard document'.
- Size:** A label 'Size:' followed by the text '0 Byte'.
- Created at:** A label 'Created at:' followed by the text '13-07-2026 10:36'.
- Last changed at:** A label 'Last changed at:' followed by the text '14-07-2026 13:02'.
- Created by:** A label 'Created by:' followed by a green circular icon with 'JJ' and the text 'Jones Jack'.
- Last changed by:** A label 'Last changed by:' followed by a green circular icon with 'JJ' and the text 'Jones Jack'.

At the bottom right of the dialog, there are three buttons: 'Save and close' (highlighted in blue), 'Save', and 'Cancel'.

Figure 5.10: Document Properties

- **Type:** The type of the document is displayed here. This information corresponds to the column *Type* in the *DMS–Object–Table*.
- **Organizational unit:** This field is available for folders only and allows the selection of an organizational unit which is used for permissions: Via role *home* OU-dependent permissions can be defined for this folder. If a user has role *home* in the organizational unit of folder's org-unit, he has the permission *Edit objects* for this folder and the documents inside this folder, but not for the sub-folders!
- **Size:** This information shows the size of the document in KB (Kilo Bytes) and in bytes. The values can be different since this size in bytes is rounded to KB. This element is available for documents only.
- **Status:** This information is only available for locked documents and shows by whom the document is locked.
- **Created at:** This line shows the point in time when the document has been created.
- **Created by:** The name of the user who created the document is displayed here.
- **Last changed at:** This information corresponds to the according entry in the column *Last changed at*. It is the point in time when the document has been changed the last time.

- **Last changed by:** This is the name of the last user who edited the document at the time described above.
- **Propagate permission list:** If this checkbox is checked, the folder passes its permission list to all its subfolders and all DMS objects contained in this folder. This element is available for folders only.
- **Buttons:** The following buttons are available:
 - Save and close: Activating this button will result in saving the changes and closing the dialog. This button is applied for changes in tabs *General*.
 - Save: Activating this button will result in saving the changes, but the dialog will be kept open. This button is applied for changes in tabs *General*.
 - Cancel: Activating this button will result in closing the dialog without saving the changes.

5.3.14 Versions



This dialog can be opened by navigating to the tab *Versions* in the properties dialog of a DMS object.

This dialog can be used to display the versions of a DMS object. The table entry, which is in italic letters, is the current state that allows a comparison with older versions.

Content of table *Versions*:

- **Changed at:** This column shows the change time of the corresponding version.
- **Changed by:** This column lists the name of the user who changed this version.
- **Document:** If a version has been created for a document, a link to the document at the creation time of the version is displayed.
- **Form:** Some documents have additional metadata. Clicking the *form icon* results in displaying metadata of the document. Furthermore it is possible to compare different versions analog to *Form changes* in tab *History* of a process (see section [Functions of the process history](#) for details).
- **Size:** This column is available for documents only and shows the file size of document's version.
- **Comment:** This column shows the comment of the corresponding document version, if the user who created the version entered one.
- **Delete:** At least one item of the version table has to be selected prior to activating this function. The function *Delete* can be used to delete selected versions from the version table. The request has to be confirmed in a pop-up dialog window. If the dialog is confirmed by clicking *Delete*, the version will be deleted and disappears from the version table. The button *Cancel* can be used to abort the function without deleting a version.



5. The Group Documents

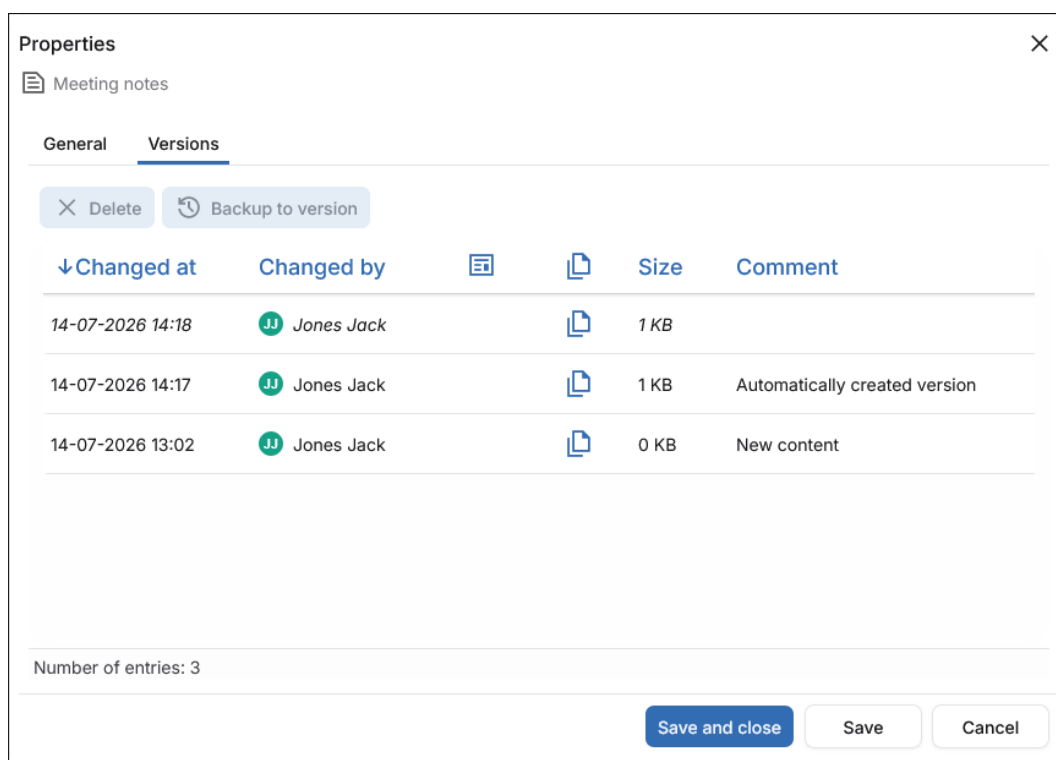


Figure 5.11: **Versions**



- **Backup to version:** One item of the version table has to be selected prior to activating this function. The function *Backup to version* can be used to backup the content of the document to the content of the selected version. As a description for a version created in this way the text *Automatically created version* appears.

Example: The DMS–Object–Table is displayed, and contains at least one document with a corresponding version.



1. Click at an entry of the DMS–Object–Table and activate the function *Properties*. Click on the tab *Versions*. The version table is displayed .
2. Select an entry in versions table and activate function *Backup to version*.
3. The content of the current document is replaced by this version.

6. Appendix

6.1 Task Functions in *EPworX*

...

Clicking on the function symbol in your worklist loads a window shown in figure 6.1. It contains all task functions that can be applied to the according task.

The following task functions are offered by *EPworX* as a default:

- Copy to ...
- Set due date
- Set read/unread

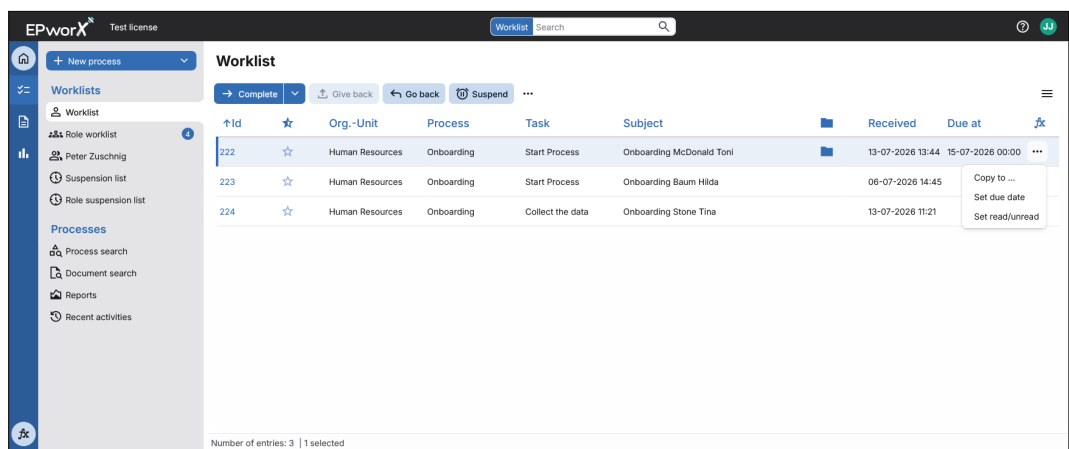


Figure 6.1: Task functions

6.1.1 Copy to ...

This function can be used to send a copy of the current task to any user. The copy contains read-only versions of all forms, documents and processes of this task. They cannot be modified.

Clicking the link *Copy to ...* loads a dialog (see figure 6.2) in your work area.

Copy to ...

222 | Onboarding McDonald Toni

Users

Filter

	↑ Name	Id	Org.-Unit
☐	RH Rollnig Hannah	hannah	PDTS
☐	JJ Jones Jack	jack	Human Resources
☐	RK Raphael Kollmann	raphael	PDTS
☐	TM Thomas Müller	thomas	
☐	LM Linda Musterfrau	linda	Human Resources
☐	WM Walter Mustermann	walter	
☐	PZ Peter Zuschnig	peter	

Number of entries: 16

Comment

Ok **Cancel**

Figure 6.2: **Copy to ...**

Content of the dialog *Copy to ...*:

- **Users:** Select the user who should get a copy of the current task.
- **Comment:** Enter a comment for the recipient.
- **OK:** Click this button to confirm your entries and send a copy to the selected user.
- **Cancel:** This button can be used to abort the execution of the function.

After the successful execution of this function a copy of the task appears in the worklist of the selected user. The task is named *copy*.



Hint: If you complete a copy (function *Complete*) it will be removed from your worklist.

Example

Precondition: Your personal worklist is displayed and there is an already started process (with forms, documents etc.).

...

1. Click the function icon in the column *Functions*. A new window appears containing the functions that can be applied to the actual tasks (see figure 6.1).
2. Activating the link *Copy to ...* displays the dialog shown in figure 6.2.
3. Select your name in the *Users* list.
4. Confirm your entries by using the button *Ok*. A copy of the current task will be put in your worklist.

Hints



- **Error message:** If any errors occur during the execution of the function, the error messages will be displayed in the work area.
- **Copy:** A copy of a task can be recognized by its name. It is called *copy*.

6.1.2 Set due date

This function can be used to set the due date for a process, a task or both.

Clicking on the function *Set due date* loads the dialog *Set due date* (see figure 6.3) in your worklist.

Figure 6.3: **Set due date**

Content of the dialog *Set Due-date*:

- **Task due date:** Enter the point of time when the actual task should be finished.
- **Process due date:** Enter the point of time when the actual process should be finished.
- **Ok:** Click this button to confirm your entries and the due date will be set.
- **Cancel:** This button can be used to abort the execution of the function and you will be transferred to your worklist.



Hint: The column *Due at* in your worklist (see chapter [Structure of the worklist](#)) shows the due date of the corresponding task or process respectively. This function can be executed only, if right *Edit process instances* is assigned.

6.1.3 Set read/unread

Through the activation of this function the corresponding entry of your worklist is set to *Unread* (displayed in bold letters) or *Read* (displayed in normal letters).