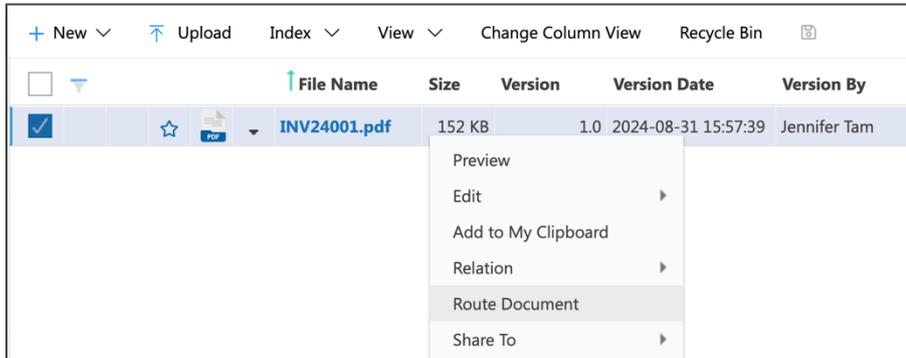


## P. Route Document

### I. Create New Routing

1. You can route a document for single-step approval or review without setting up a workflow diagram. Select “Route Document” from the context menu.



2. The Route Document window will appear. Select the priority with either Low, Normal, High or Top.

A screenshot of a 'Document Workflow' dialog box. The title bar says 'Document Workflow' and has a 'Next' button and a close button. The main area contains two dropdown menus: 'Workflow Template' set to 'Adhoc routing' and 'Priority' set to 'Normal'. Below these is a 'To :' label followed by an empty text input field.

3. Select the recipient(s) either by user account or user group.

A screenshot of the same 'Document Workflow' dialog box. The 'Workflow Template' is 'Adhoc routing' and 'Priority' is 'Normal'. The 'To :' field now contains the text 'Jennifer Tam;User1'.

4. Input both the Subject and Body. The subject will appear in both email and Workflow Inbox, while the Body will appear in email notification.

Document Workflow
Next ✕

Workflow Template: Adhoc routing Priority: Normal

To: Jennifer Tam;User1

Subject: Please review the Invoice

Body: I will send the invoice to ABC Company this Tuesday, please review and approve.

5. Select the Due Date and Cancel After Date. If your recipients do not respond to your request, the system will keep sending email reminder every midnight until it reaches the "Cancel After" date.

Due before: 2024-09-03

Cancel after: 2024-09-06

6. There are several types of action for routing.

Type	Description	Action Buttons
Collaborate	When the recipient receives this request, they can make changes on the documents or place annotation, send back to the originator to and fro. Until the originator confirmed completed.	Reply, Completed
Approve	Approve or reject the document.	Approve, Reject
Review	Ask for review only	Reviewed
Notification	Ask for read notification.	Read

7. The scope will take effect when there are more than one recipient.

Scope	Description
All	All recipients must reply or approve (in case the type is approval request).
Major	Over or equal to 50% of recipients reply or approve.
Any	Any one of the recipients reply or approve.

Type: Notification

Scope: Any

8. In case you want the recipient to receive the document as attachment in the email notification, please check on this option. Bear in mind if the document size is over a certain limit, the recipient email server may not be able to receive.

Include original : <input type="checkbox"/>
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