Background

KFS 6 provides a new feature called Ad Hoc Route for Completion which will route a document to a person or group for completion. The Ad Hoc Route for Complete action can be added to INITIATED or SAVED documents by the Initiator. The Complete action may be used to route documents to someone else to complete and/or check an initiator’s document. Similar to other types of Ad Hoc routing, the COMPLETE action will interrupt the normal workflow.

Getting Started

When the Initiator is done entering the data into the document, the document should be SAVED.

To add the Ad Hoc Route for Completion, scroll to the Ad Hoc Recipient tab and select “COMPLETE” under the Action Requested drop down menu.

Enter the person’s name in the Person field and click “add”. The COMPLETE action will be listed in the Ad Hoc Recipients.
SUBMIT the document. The Document Status will be updated to ENROUTE and the document will be routed to the person for Completion.

The person completing the document should enter any missing information and/or correct any information and then click “complete”. KFS will check the document to ensure the data passes the validations.

The document will proceed through the normal workflow routing.