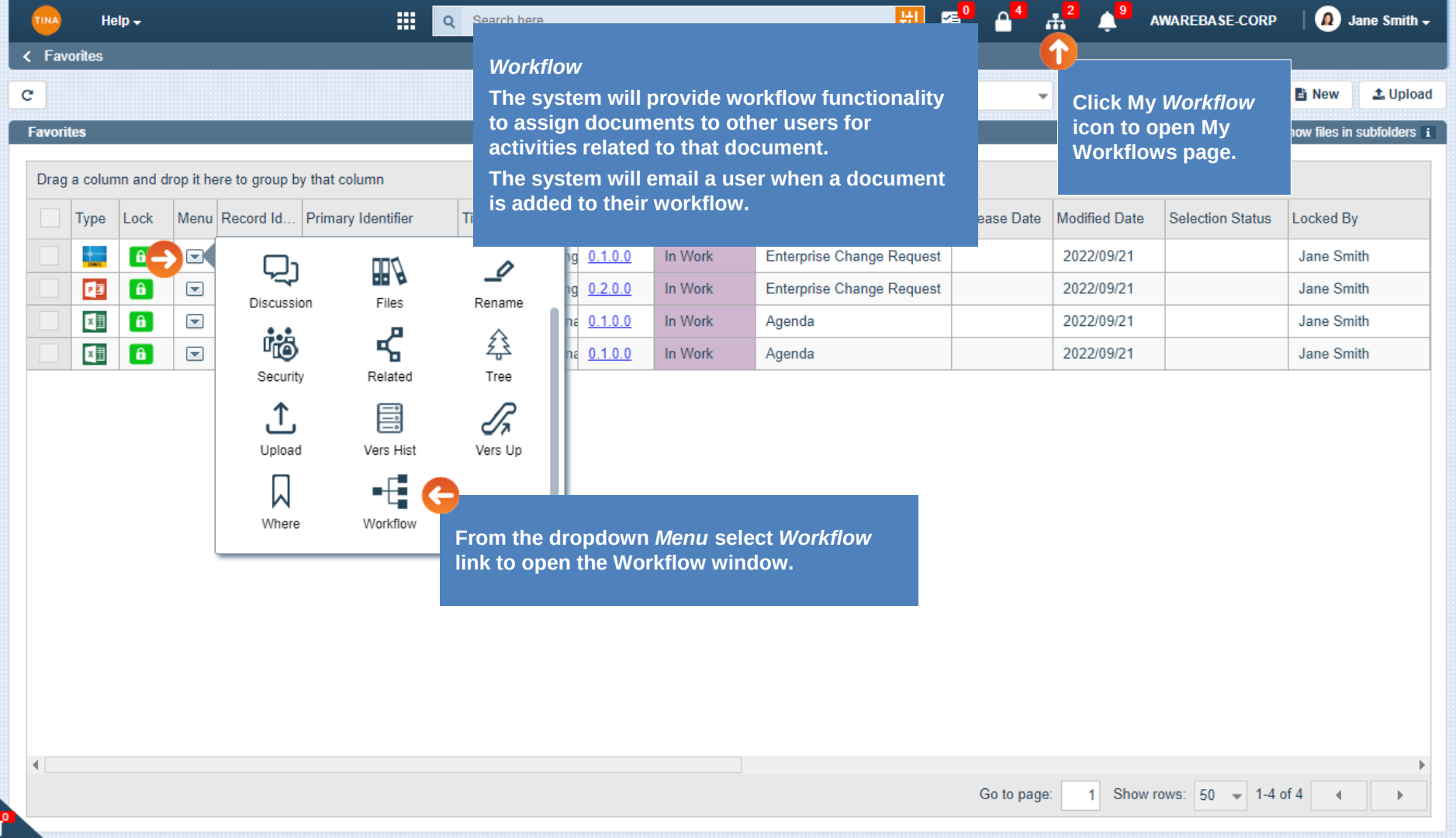
Section 10

Workflow

Navigation to the Workflow
Workflow window
Save Workflow as Template
Create Workflow from Template
Creating Workflow Steps
Add Instruction
Due Date
Escalation
Duration
Initiate Workflow Process
Pause Workflow
Bulk Edit Workflow Steps
Notification Settings for the Workflow Manager
Default Network Workflow Notification Settings
Workflow for the Deleted Record
My Workflow Templates
- Edit Workflow Template
- Delete Workflow Template

Bulk Workflow
- Change Workflow Manager on existing workflows
- Pause Workflow on existing workflows
- Delete Steps Not Completed on existing workflows
- Add the workflow steps
- Reset the workflow steps
- Job Status Report



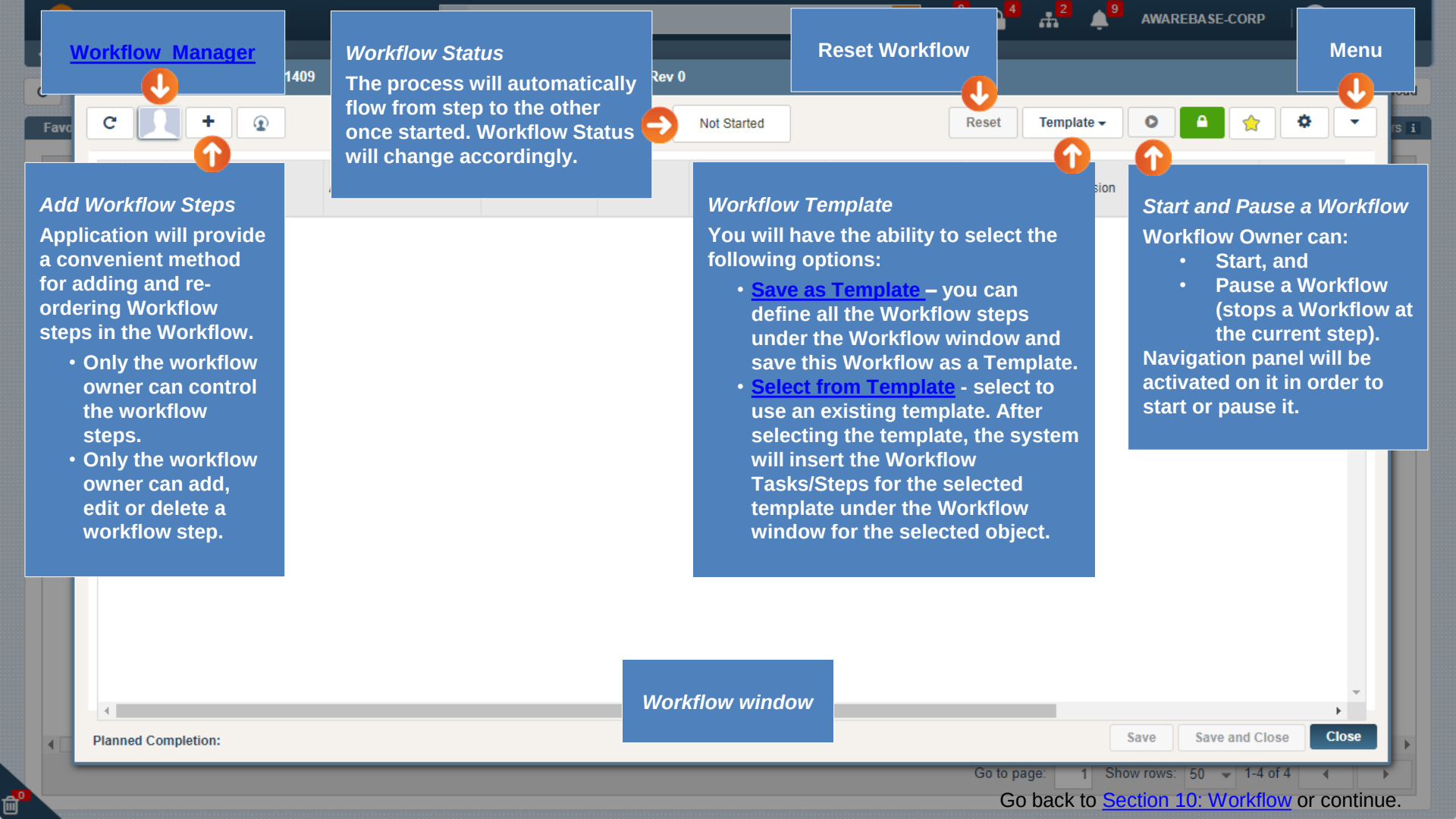
Workflow

The system will provide workflow functionality to assign documents to other users for activities related to that document.

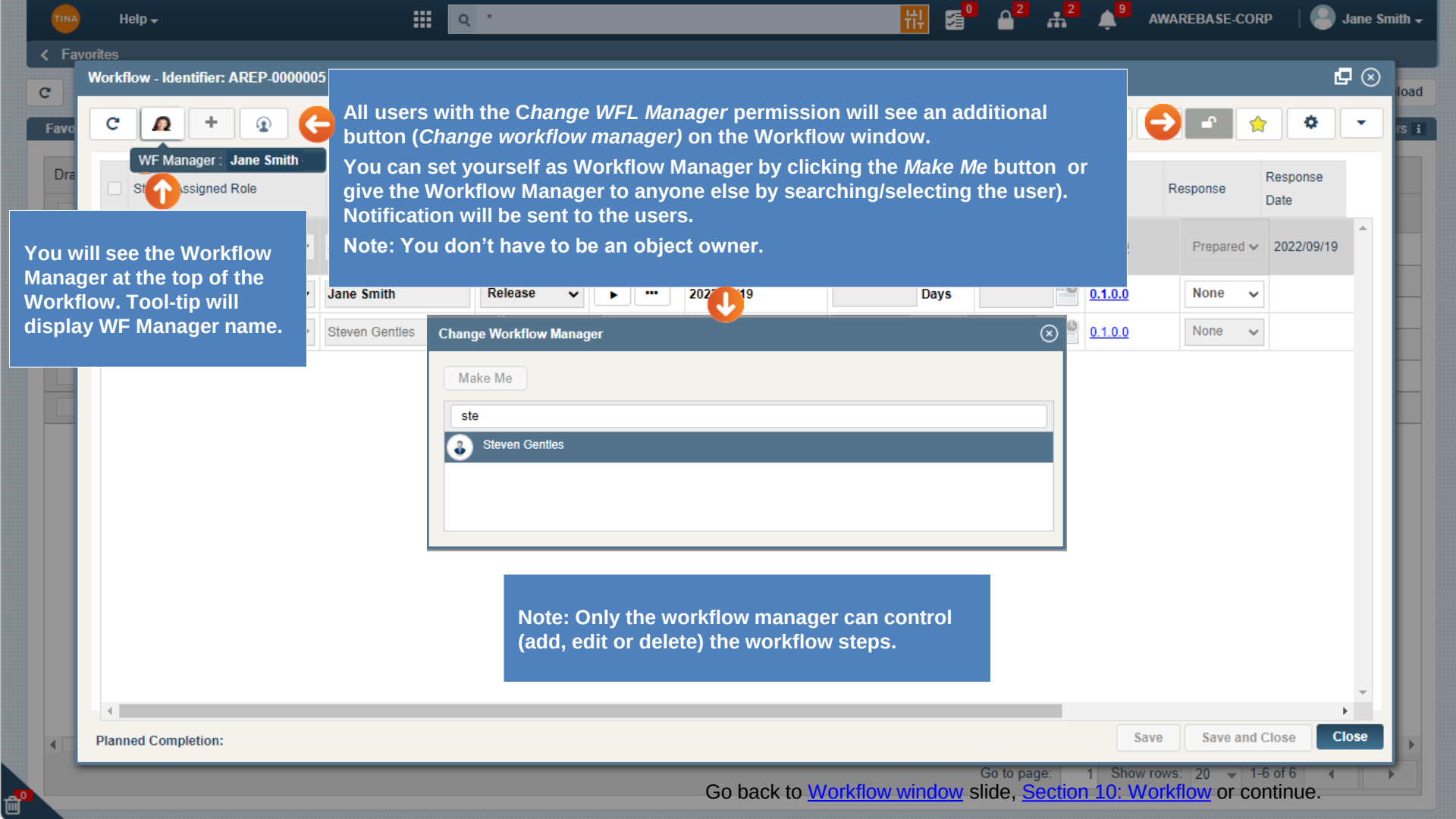
The system will email a user when a document is added to their workflow.

Click My *Workflow* icon to open My Workflows page.

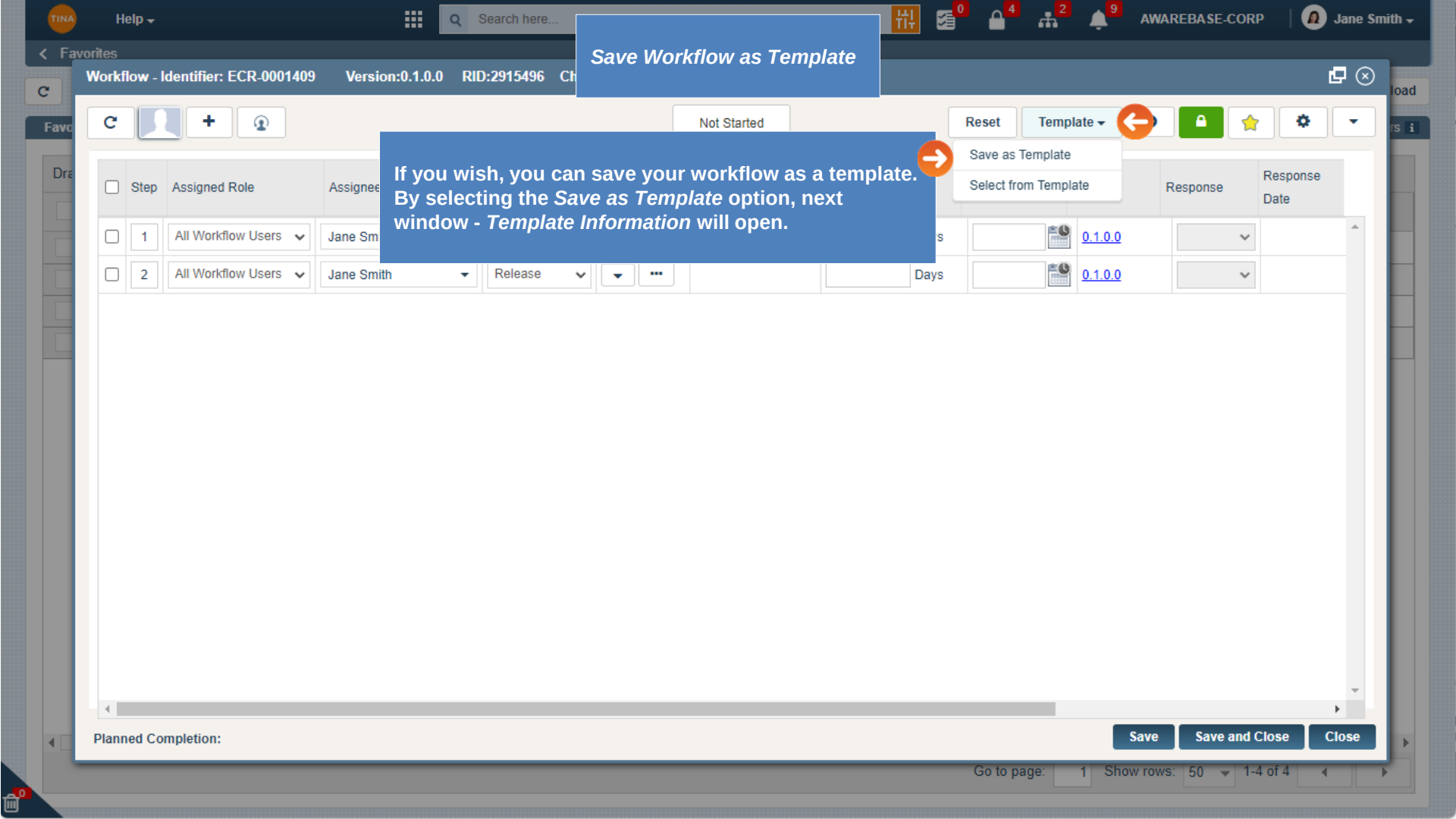
From the dropdown *Menu* select *Workflow* link to open the Workflow window.

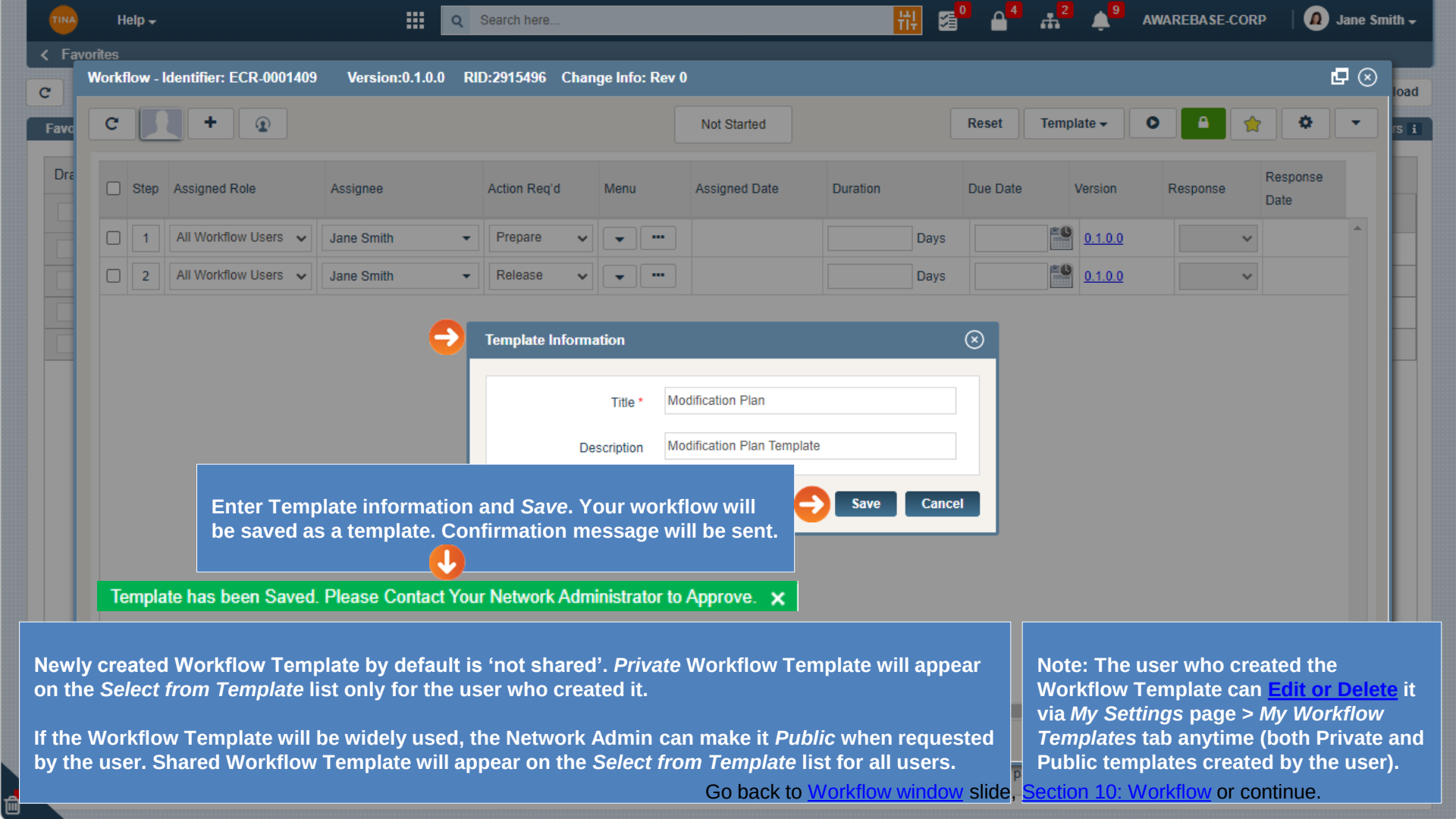


Go back to Section 10: Workflow or continue.



Go back to Workflow window slide, Section 10: Workflow or continue.


Save Workflow as Template
Workflow - Identifier: ECR-0001409 Version:0.1.0.0 RID:2915496
Not Started
Reset
Template
Save as Template
Select from Template
If you wish, you can save your workflow as a template. By selecting the Save as Template option, next window - Template Information will open.
Step
Assigned Role
Response
Response Date
All Workflow Users
Jane Smith
Release
Days
0.1.0.0
Planned Completion:
Save
Save and Close
Close



Newly created Workflow Template by default is 'not shared'. *Private* Workflow Template will appear on the *Select from Template* list only for the user who created it.

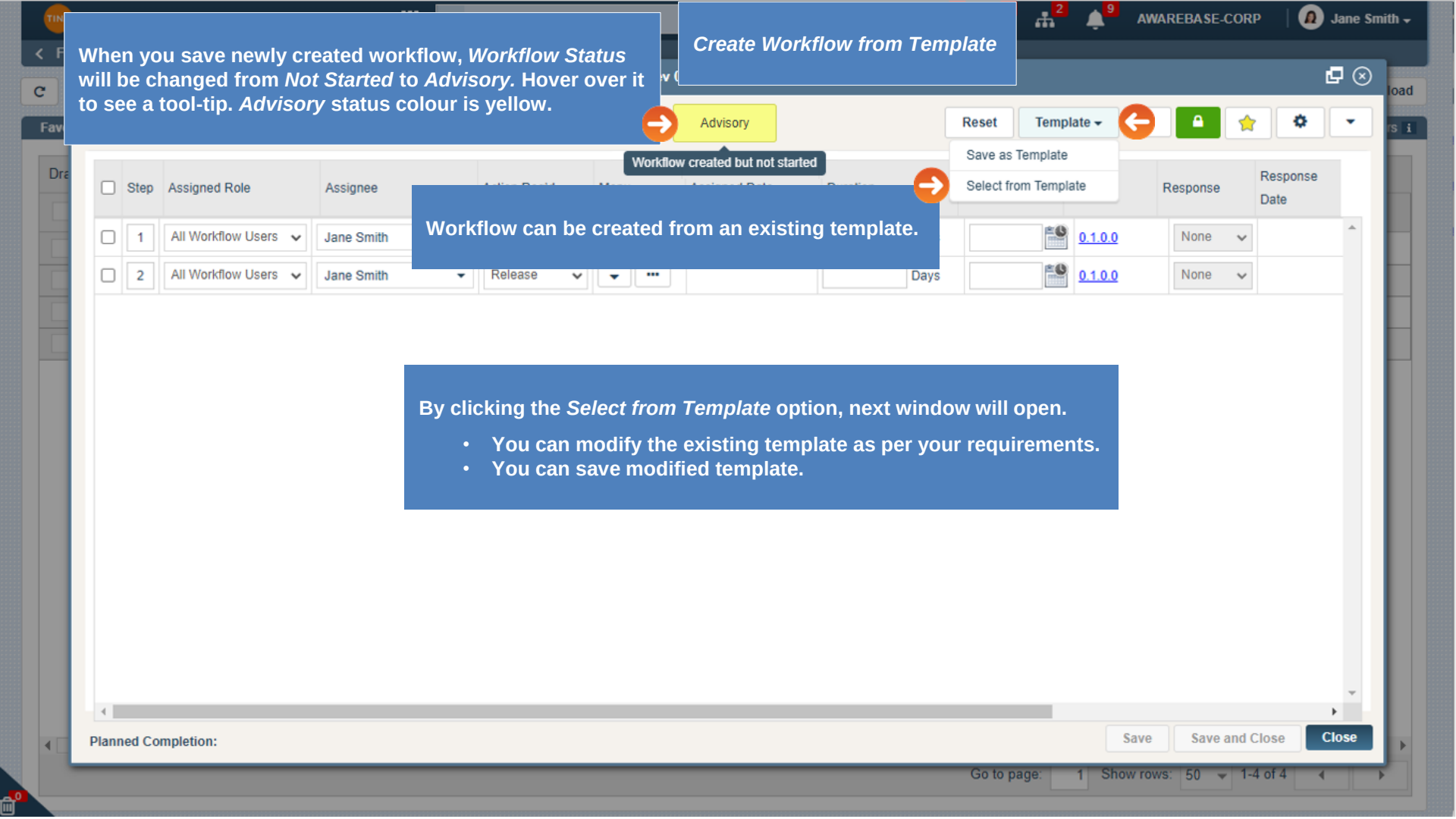
If the Workflow Template will be widely used, the Network Admin can make it *Public* when requested by the user. Shared Workflow Template will appear on the *Select from Template* list for all users.

Note: The user who created the Workflow Template can Edit or Delete it via *My Settings* page > *My Workflow Templates* tab anytime (both Private and Public templates created by the user).

Go back to Workflow window slide, Section 10: Workflow or continue.

Create Workflow from Template

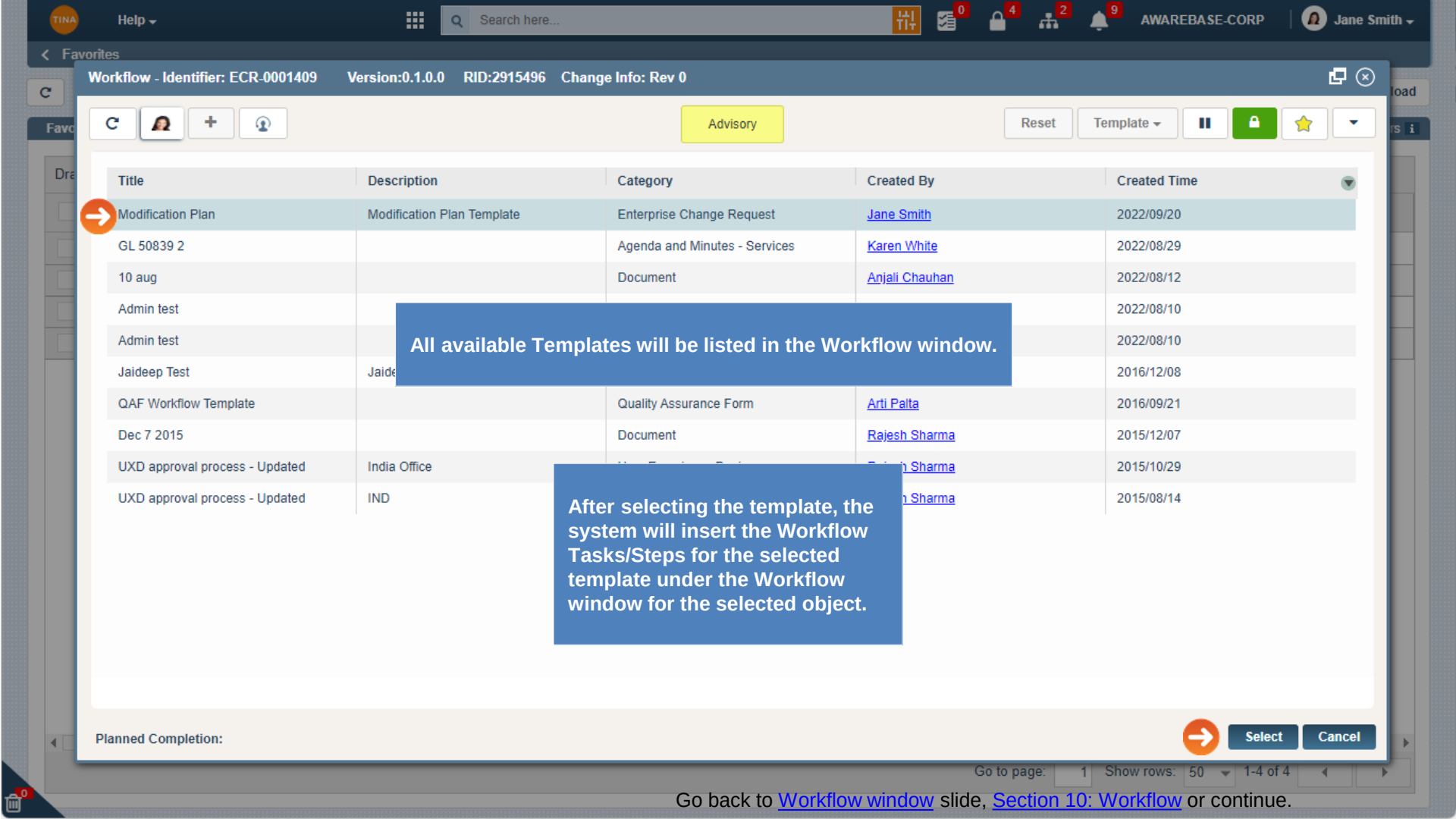
When you save newly created workflow, *Workflow Status* will be changed from *Not Started* to *Advisory*. Hover over it to see a tool-tip. *Advisory* status colour is yellow.



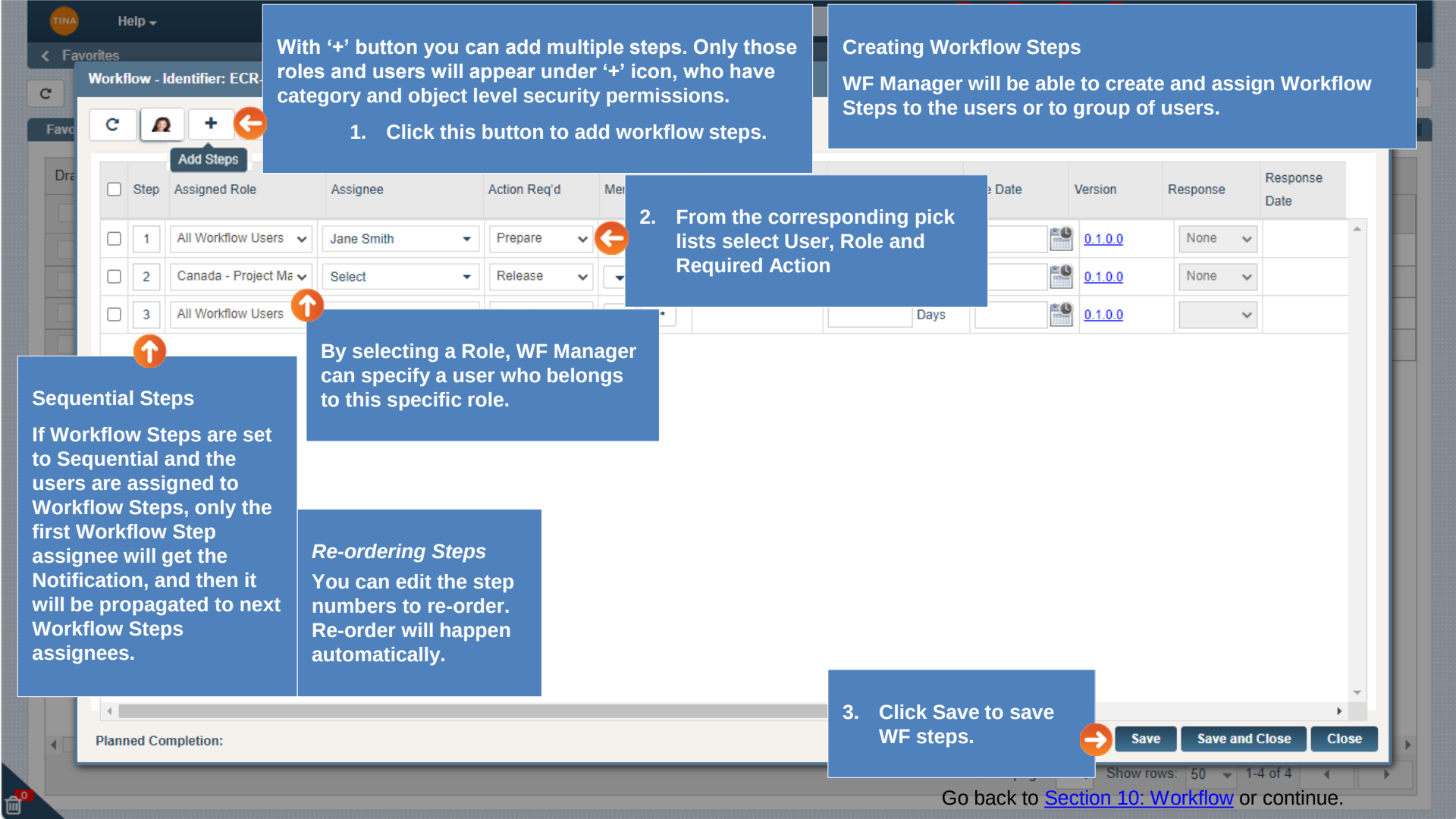
Workflow can be created from an existing template.

By clicking the *Select from Template* option, next window will open.

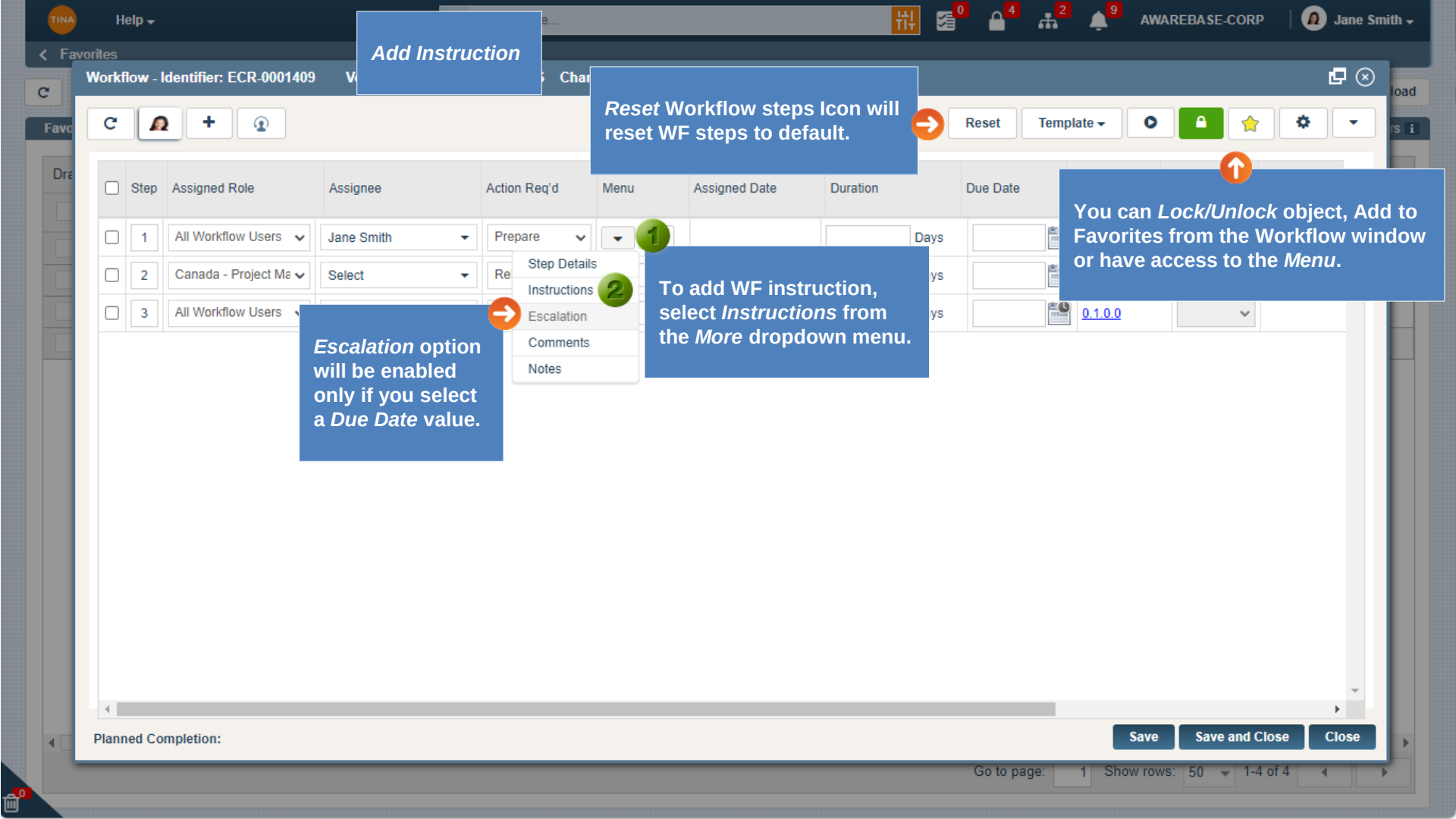
- You can modify the existing template as per your requirements.
- You can save modified template.

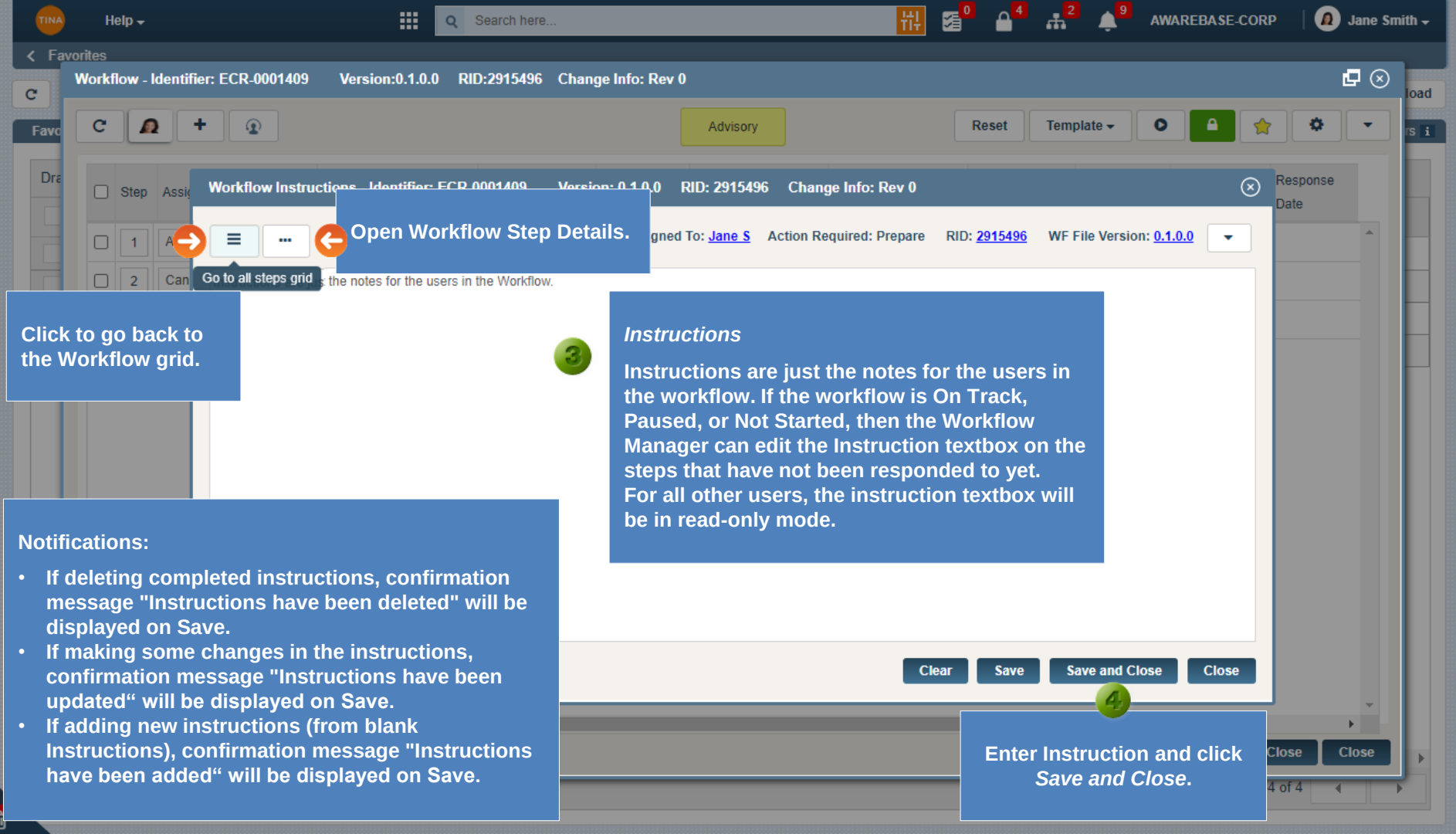


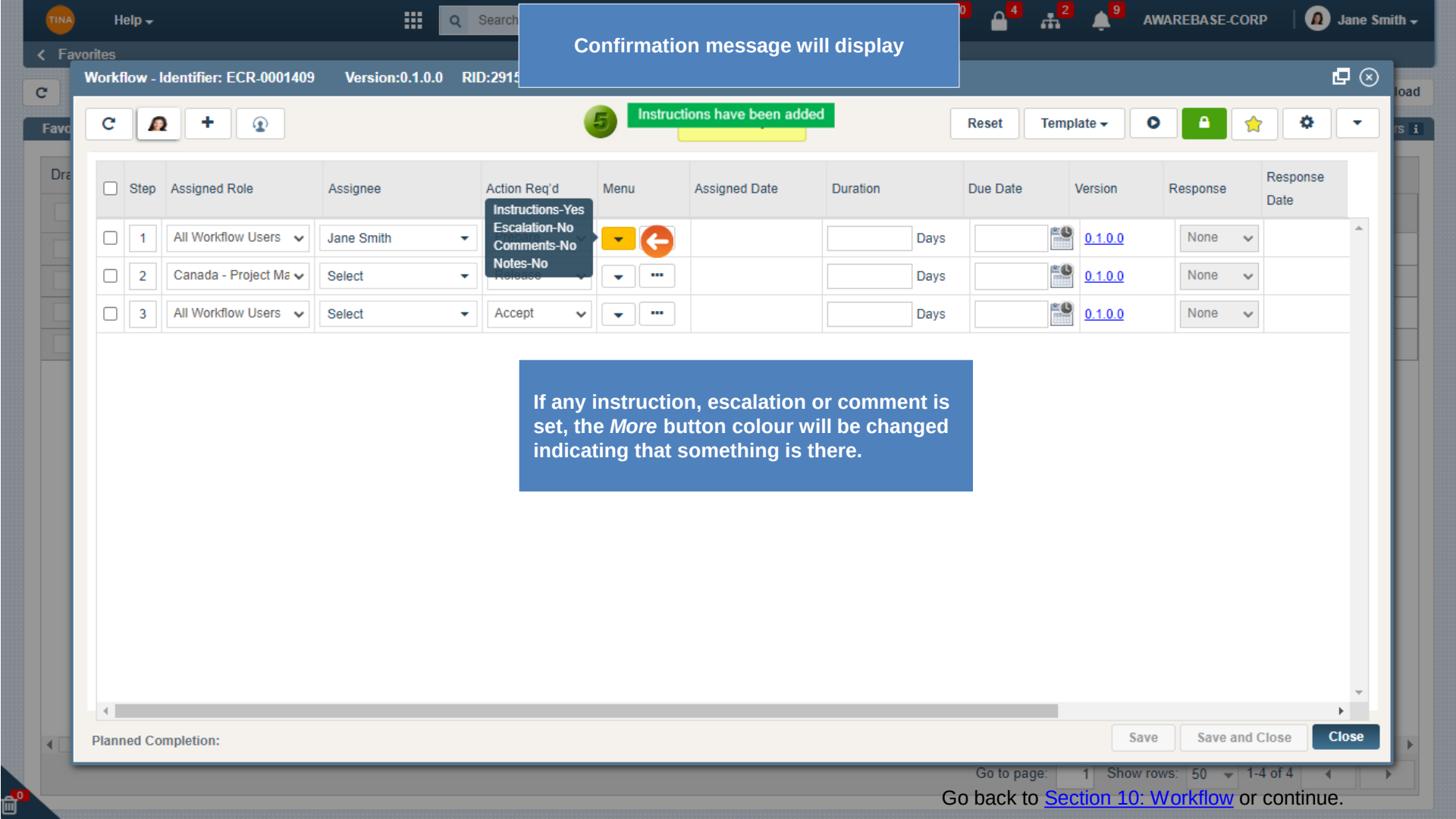
Go back to Workflow window slide, Section 10: Workflow or continue.



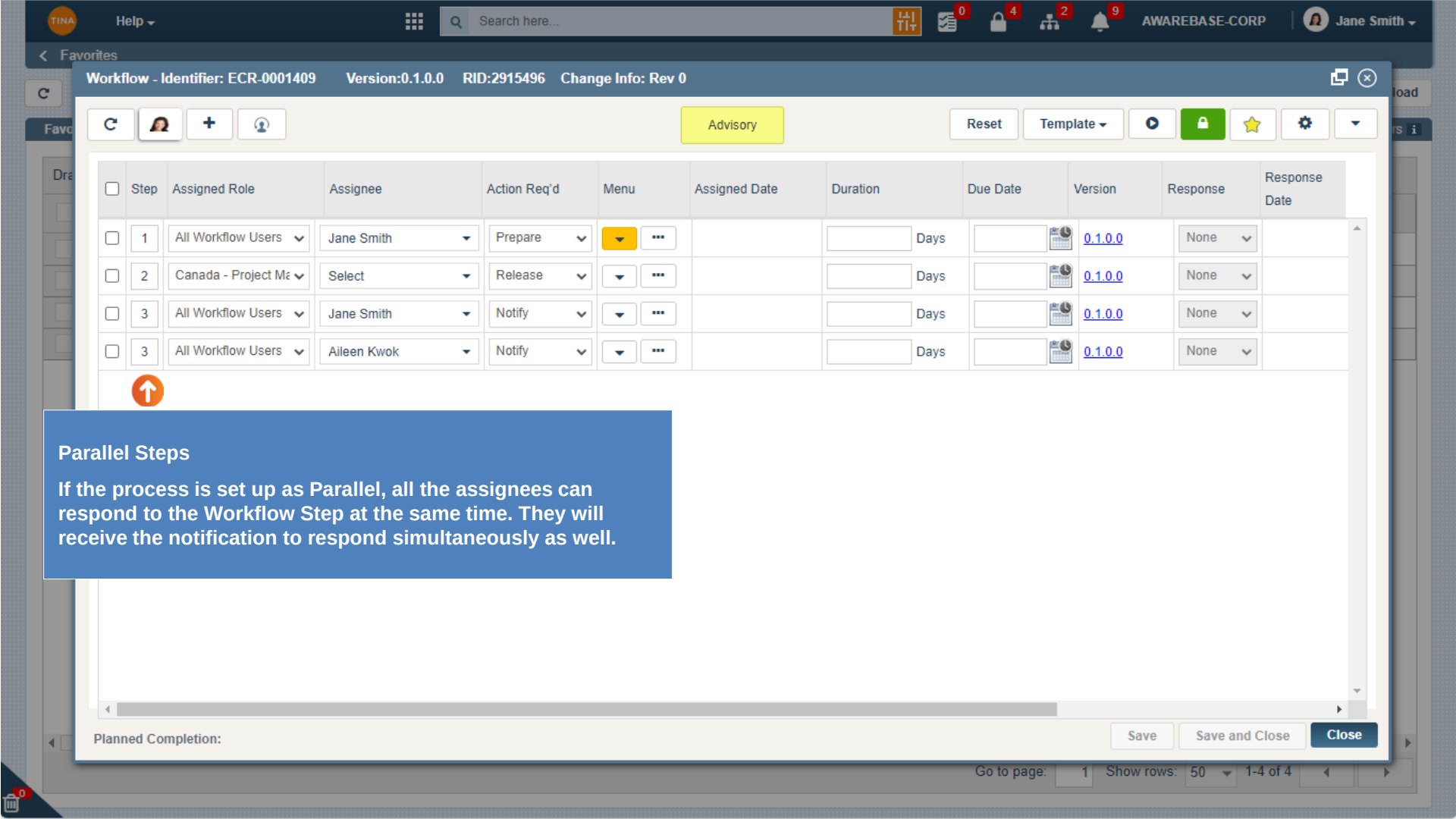
Go back to Section 10: Workflow or continue.

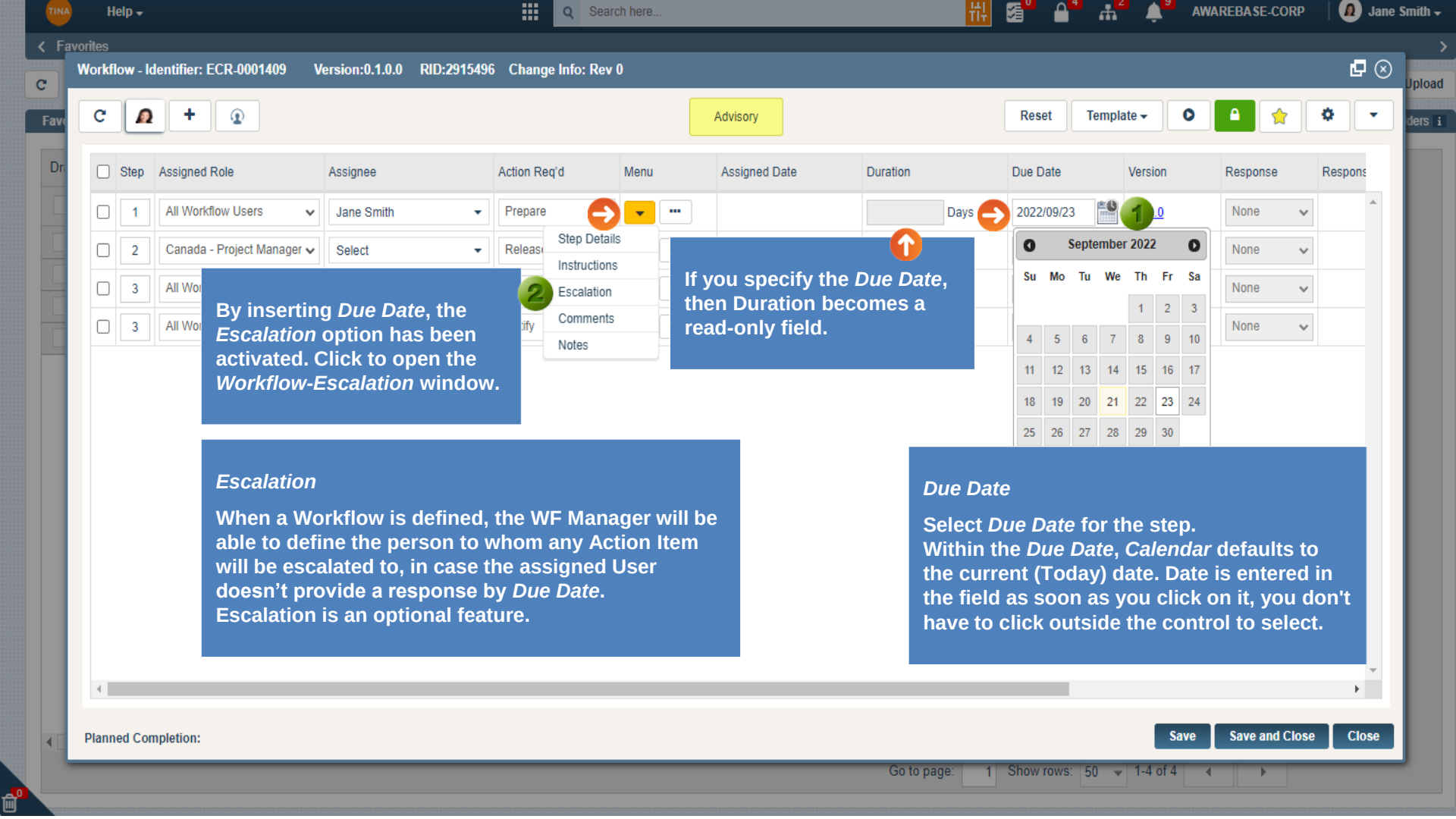

Add Instruction
Workflow - Identifier: ECR-0001409
Reset Workflow steps Icon will reset WF steps to default.
Reset
Template
You can Lock/Unlock object, Add to Favorites from the Workflow window or have access to the Menu.
Step
Assigned Role
Assignee
Action Req'd
Menu
Assigned Date
Duration
Due Date
All Workflow Users
Jane Smith
Prepare
Days
Step Details
Instructions
Escalation
Comments
Notes
To add WF instruction, select Instructions from the More dropdown menu.
Escalation option will be enabled only if you select a Due Date value.
Planned Completion:
Save
Save and Close
Close

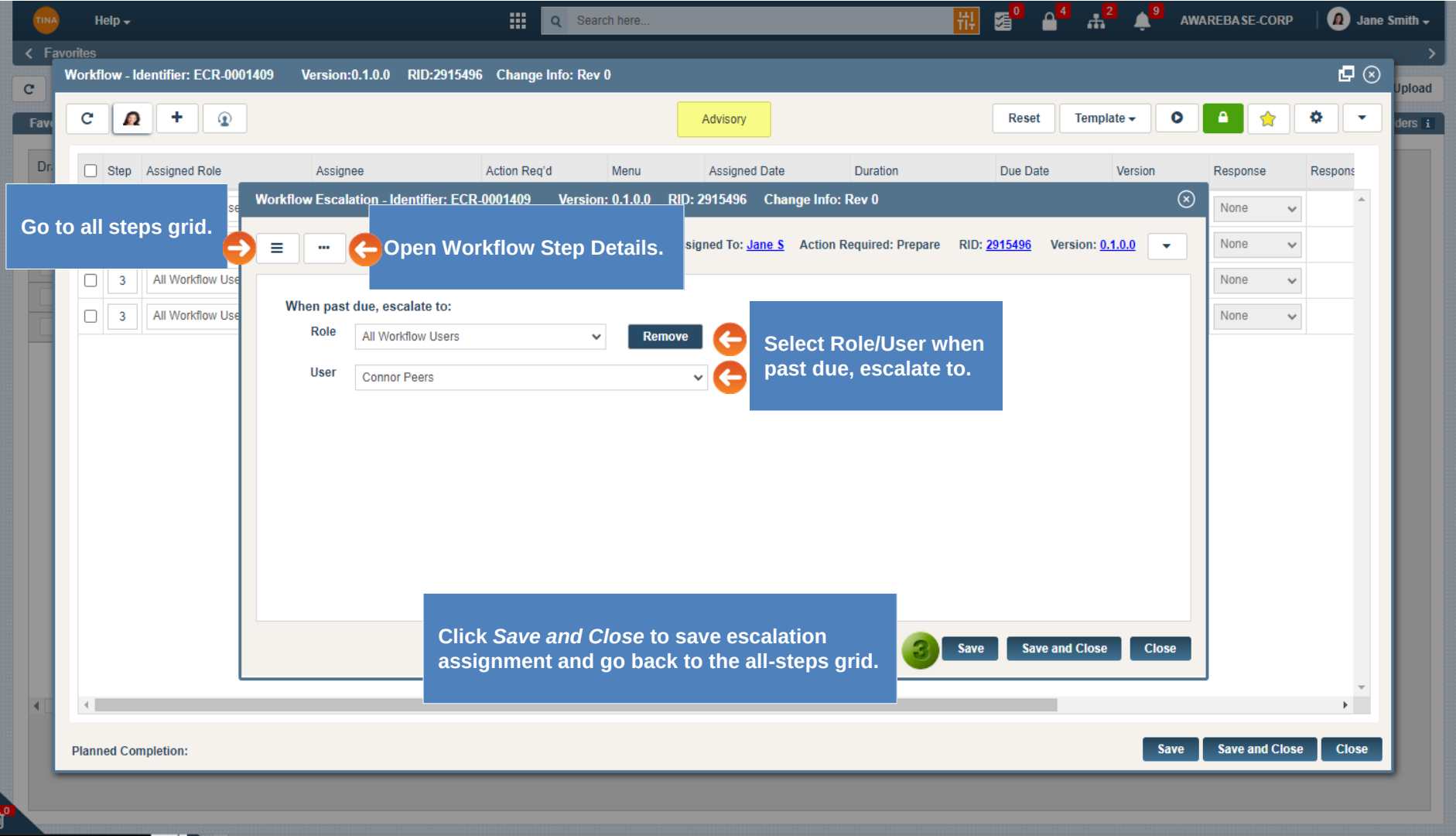

Help
Search here...
AWAREBASE-CORP
Jane Smith
Favorites
Workflow - Identifier: ECR-0001409 Version:0.1.0.0 RID:2915496 Change Info: Rev 0
Advisory
Reset
Template
Step
Response Date
Workflow Instructions Identifier: ECR-0001409 Version: 0.1.0.0 RID: 2915496 Change Info: Rev 0
Open Workflow Step Details.
Go to all steps grid
Click to go back to the Workflow grid.
gned To: Jane S
Action Required: Prepare
RID: 2915496
WF File Version: 0.1.0.0
the notes for the users in the Workflow.
3
Instructions
Instructions are just the notes for the users in the workflow. If the workflow is On Track, Paused, or Not Started, then the Workflow Manager can edit the Instruction textbox on the steps that have not been responded to yet. For all other users, the instruction textbox will be in read-only mode.
Clear
Save
Save and Close
Close
4
Enter Instruction and click Save and Close.
Notifications:
If deleting completed instructions, confirmation message "Instructions have been deleted" will be displayed on Save.
If making some changes in the instructions, confirmation message "Instructions have been updated“ will be displayed on Save.
If adding new instructions (from blank Instructions), confirmation message "Instructions have been added“ will be displayed on Save.
4 of 4

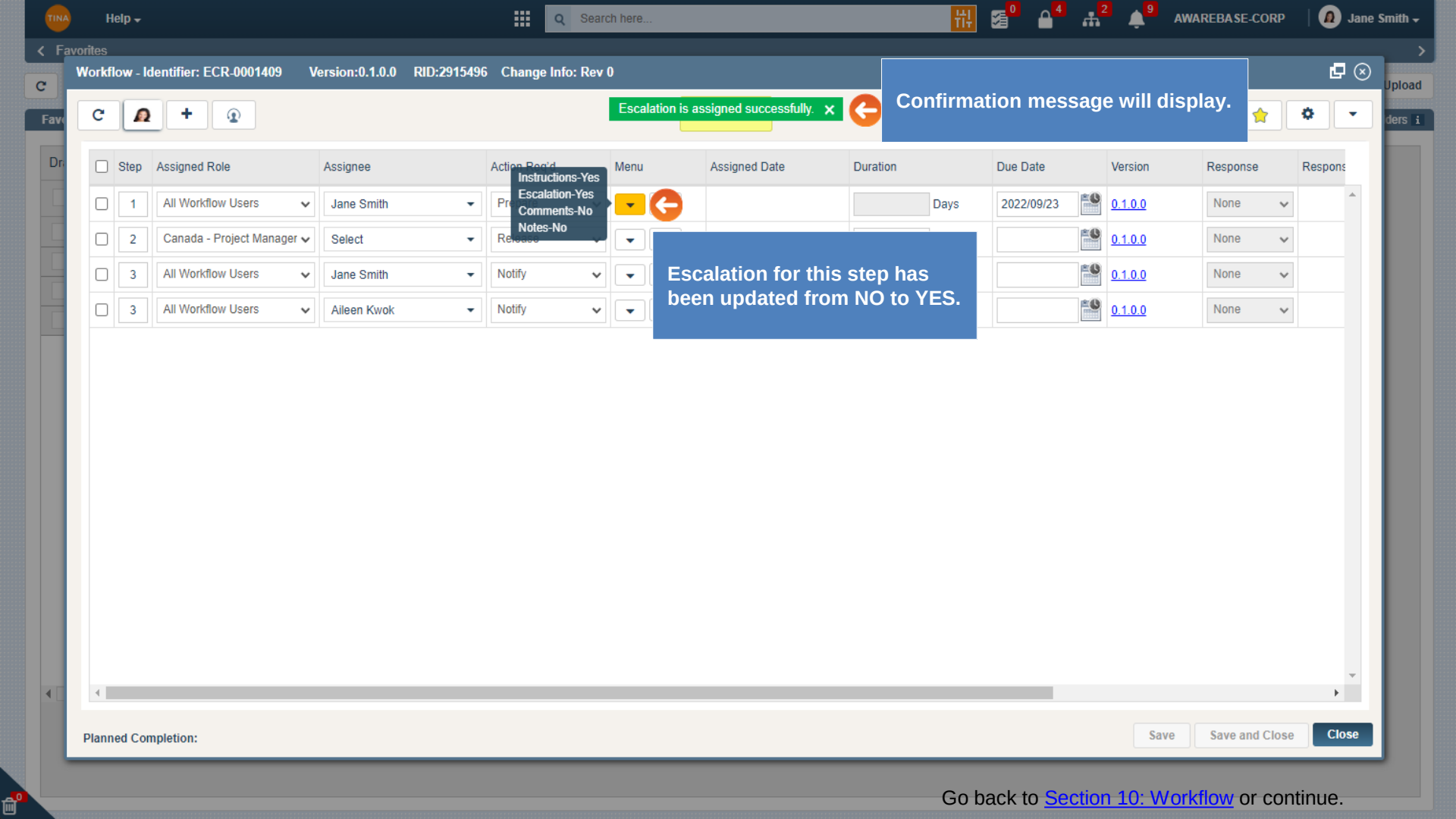


Go back to Section 10: Workflow or continue.

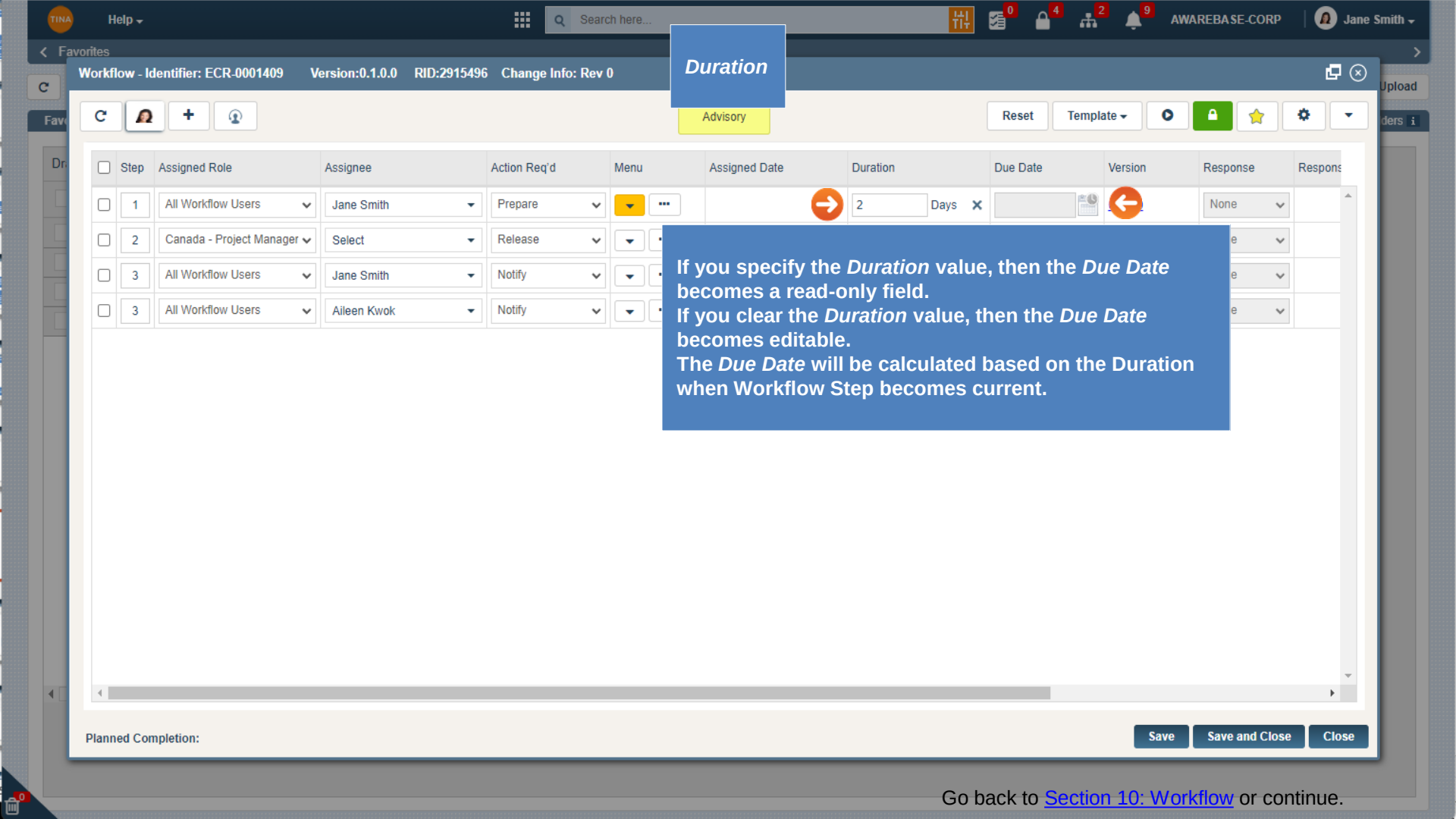

Help
Search here...
AWAREBASE-CORP
Jane Smith
Favorites
Workflow - Identifier: ECR-0001409 Version:0.1.0.0 RID:2915496 Change Info: Rev 0
Advisory
Reset
Template
Step
Assigned Role
Assignee
Action Req'd
Menu
Assigned Date
Duration
Due Date
Version
Response
Response Date
1 All Workflow Users Jane Smith Prepare Days 0.1.0.0 None
2 Canada - Project Ma Select Release Days 0.1.0.0 None
3 All Workflow Users Jane Smith Notify Days 0.1.0.0 None
3 All Workflow Users Aileen Kwok Notify Days 0.1.0.0 None
Parallel Steps
If the process is set up as Parallel, all the assignees can respond to the Workflow Step at the same time. They will receive the notification to respond simultaneously as well.
Planned Completion:
Save
Save and Close
Close
Go to page: 1 Show rows: 50 1-4 of 4


Workflow - Identifier: ECR-0001409 Version:0.1.0.0 RID:2915496 Change Info: Rev 0
Advisory
Reset
Template
Step
Assigned Role
Assignee
Action Req'd
Menu
Assigned Date
Duration
Due Date
Version
Response
1
All Workflow Users
Jane Smith
Prepare
Days
2022/09/23
None
2
Canada - Project Manager
Select
None
3
None
3
None
Step Details
Instructions
Escalation
Comments
Notes
September 2022
Su Mo Tu We Th Fr Sa
By inserting Due Date, the Escalation option has been activated. Click to open the Workflow-Escalation window.
If you specify the Due Date, then Duration becomes a read-only field.
Escalation
When a Workflow is defined, the WF Manager will be able to define the person to whom any Action Item will be escalated to, in case the assigned User doesn't provide a response by Due Date.
Escalation is an optional feature.
Due Date
Select Due Date for the step.
Within the Due Date, Calendar defaults to the current (Today) date. Date is entered in the field as soon as you click on it, you don't have to click outside the control to select.
Planned Completion:
Save
Save and Close
Close

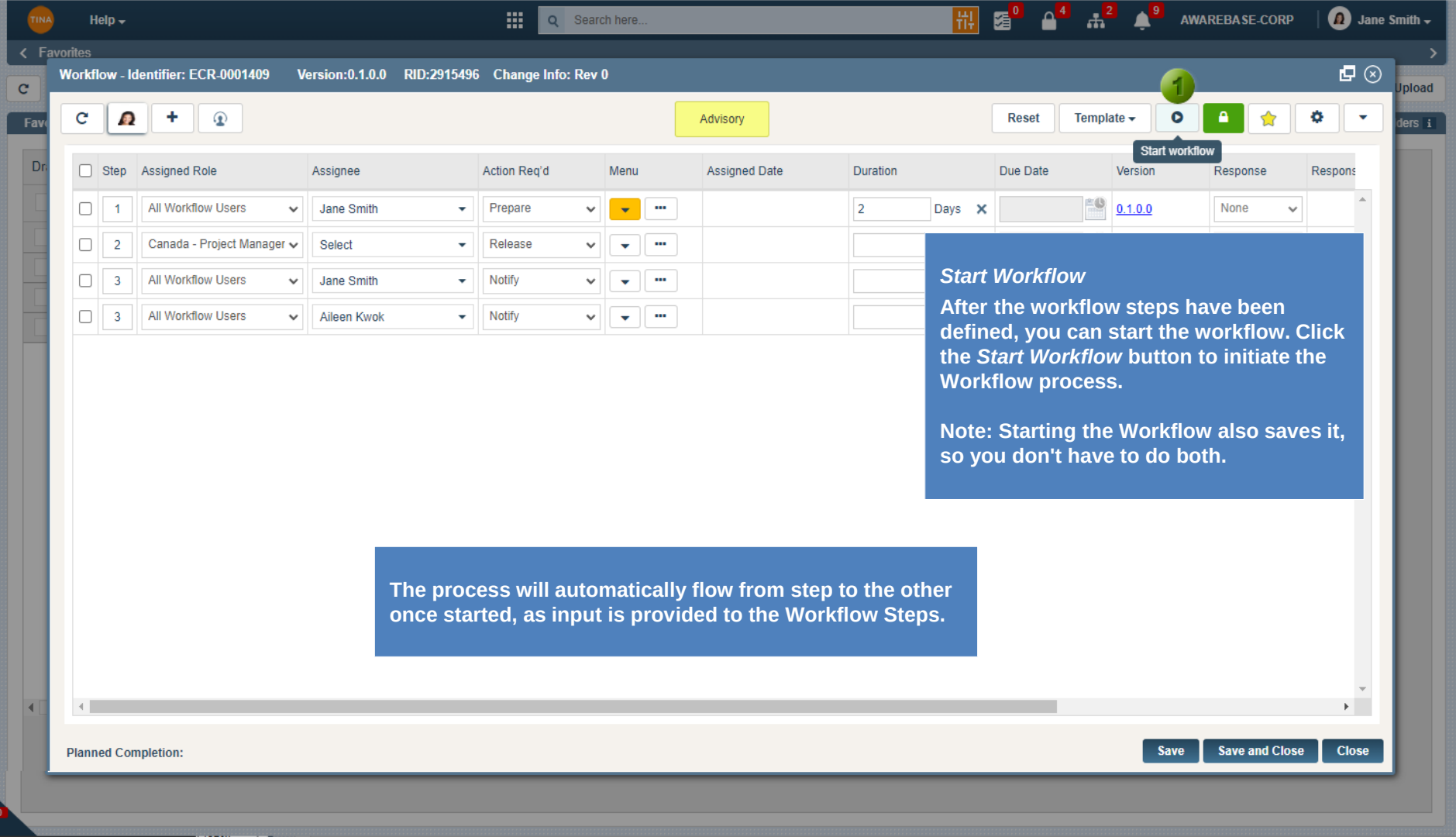

Help
Search here...
AWAREBASE-CORP
Jane Smith
Favorites
Workflow - Identifier: ECR-0001409 Version:0.1.0.0 RID:2915496 Change Info: Rev 0
Advisory
Reset
Template
Step
Assigned Role
Assignee
Action Req'd
Menu
Assigned Date
Duration
Due Date
Version
Response
Go to all steps grid.
Open Workflow Step Details.
Workflow Escalation - Identifier: ECR-0001409 Version: 0.1.0.0 RID: 2915496 Change Info: Rev 0
Assigned To: Jane S
Action Required: Prepare
RID: 2915496
Version: 0.1.0.0
When past due, escalate to:
Role
All Workflow Users
Remove
User
Connor Peers
Select Role/User when past due, escalate to.
Click Save and Close to save escalation assignment and go back to the all-steps grid.
3
Save
Save and Close
Close
Planned Completion:
Save
Save and Close
Close

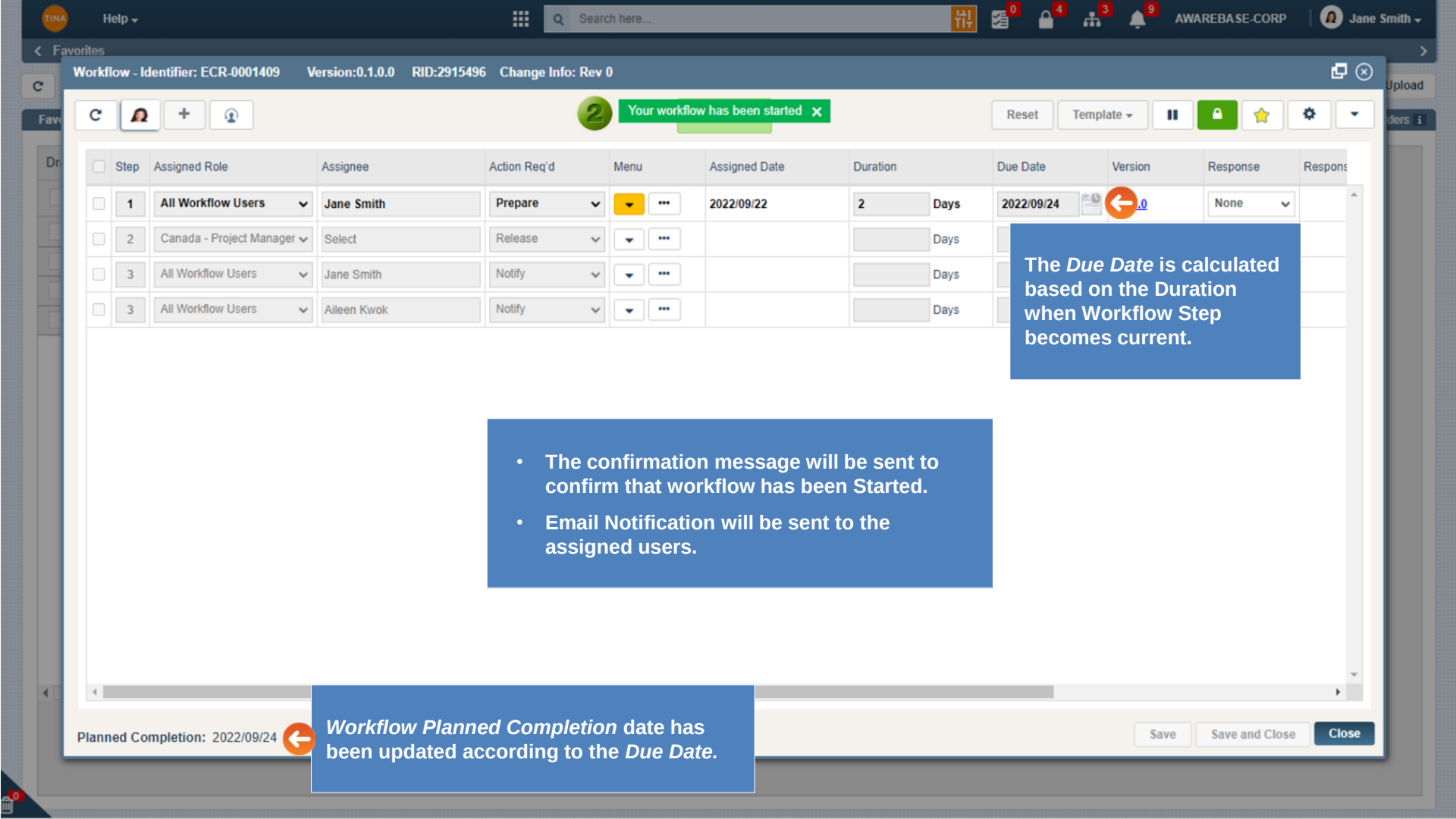


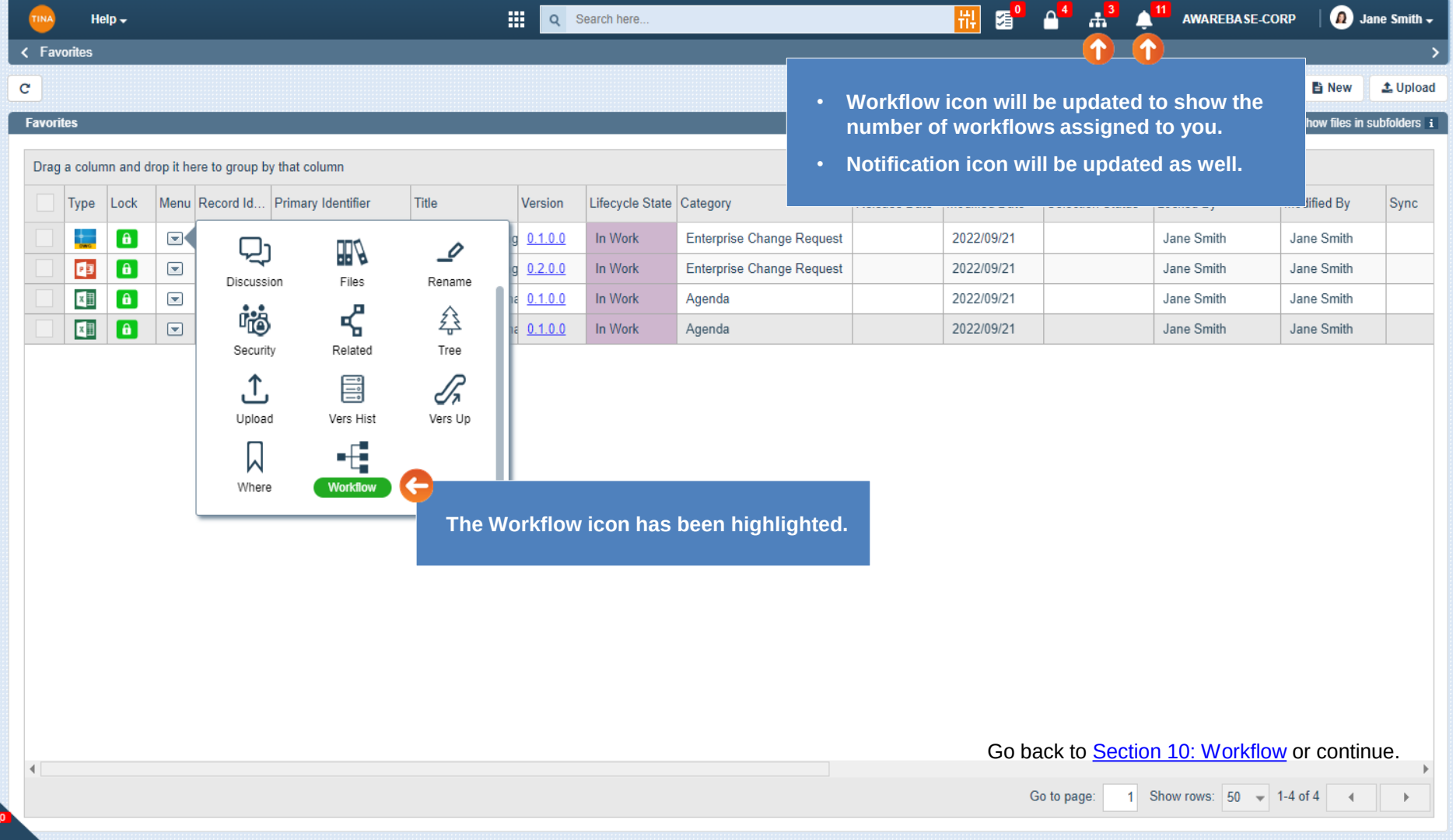
Go back to Section 10: Workflow or continue.



Go back to Section 10: Workflow or continue.


Help
Search here...
AWAREBASE-CORP
Jane Smith
Favorites
Workflow - Identifier: ECR-0001409 Version:0.1.0.0 RID:2915496 Change Info: Rev 0
Advisory
Reset
Template
Start workflow
Step
Assigned Role
Assignee
Action Req'd
Menu
Assigned Date
Duration
Due Date
Version
Response
1 All Workflow Users Jane Smith Prepare 2 Days 0.1.0.0 None
2 Canada - Project Manager Select Release
3 All Workflow Users Jane Smith Notify
3 All Workflow Users Aileen Kwok Notify
Start Workflow
After the workflow steps have been defined, you can start the workflow. Click the Start Workflow button to initiate the Workflow process.
Note: Starting the Workflow also saves it, so you don't have to do both.
The process will automatically flow from step to the other once started, as input is provided to the Workflow Steps.
Planned Completion:
Save
Save and Close
Close

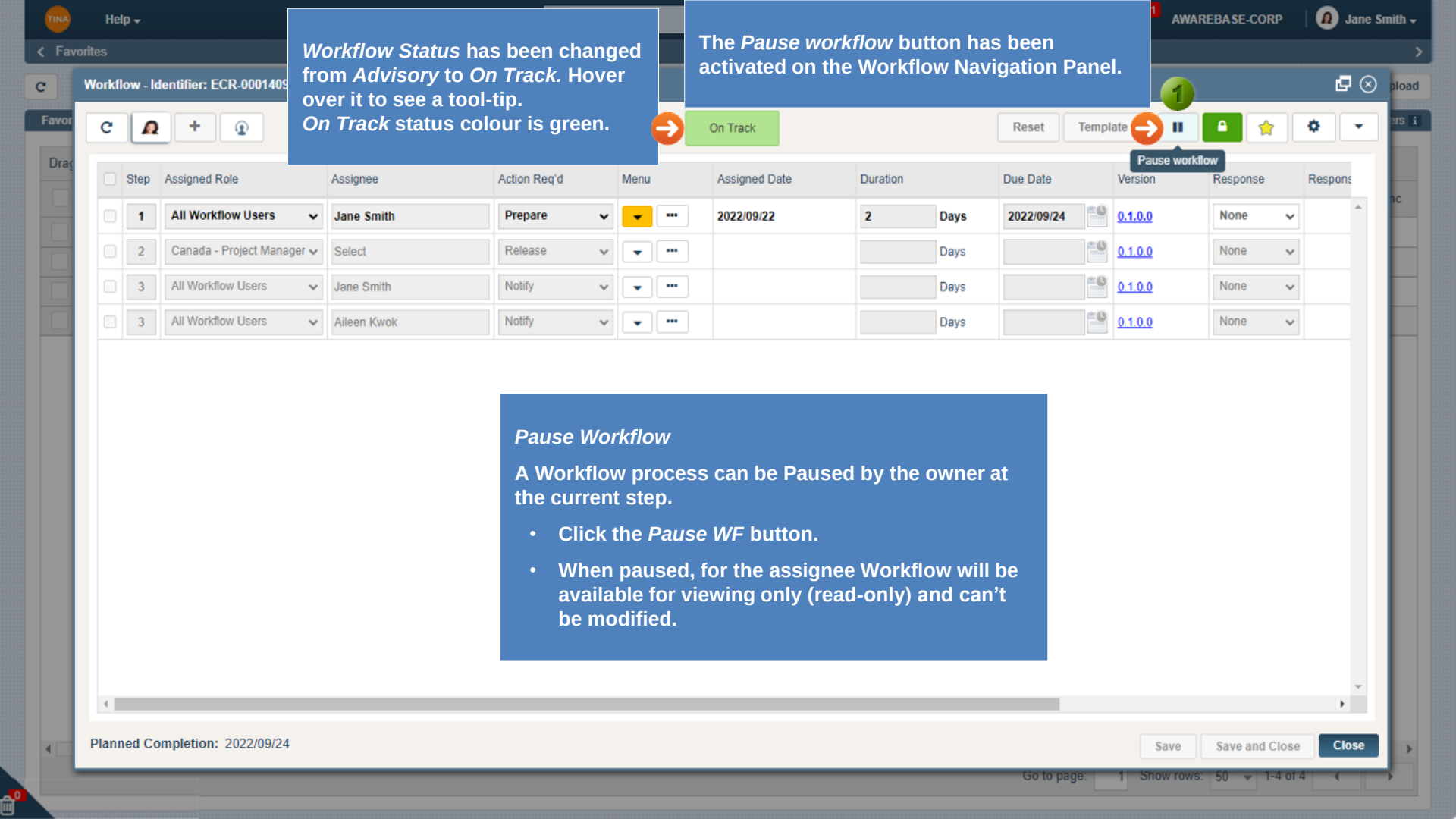

Help
Search here...
AWAREBASE-CORP
Jane Smith
Favorites
Workflow - Identifier: ECR-0001409 Version:0.1.0.0 RID:2915496 Change Info: Rev 0
Your workflow has been started
Reset
Template
Step
Assigned Role
Assignee
Action Req'd
Menu
Assigned Date
Duration
Due Date
Version
Response
1 All Workflow Users Jane Smith Prepare 2022/09/22 2 Days 2022/09/24 .0 None
2 Canada - Project Manager Select Release Days
3 All Workflow Users Jane Smith Notify Days
3 All Workflow Users Aileen Kwok Notify Days
The Due Date is calculated based on the Duration when Workflow Step becomes current.
• The confirmation message will be sent to confirm that workflow has been Started.
• Email Notification will be sent to the assigned users.
Planned Completion: 2022/09/24
Workflow Planned Completion date has been updated according to the Due Date.
Save
Save and Close
Close

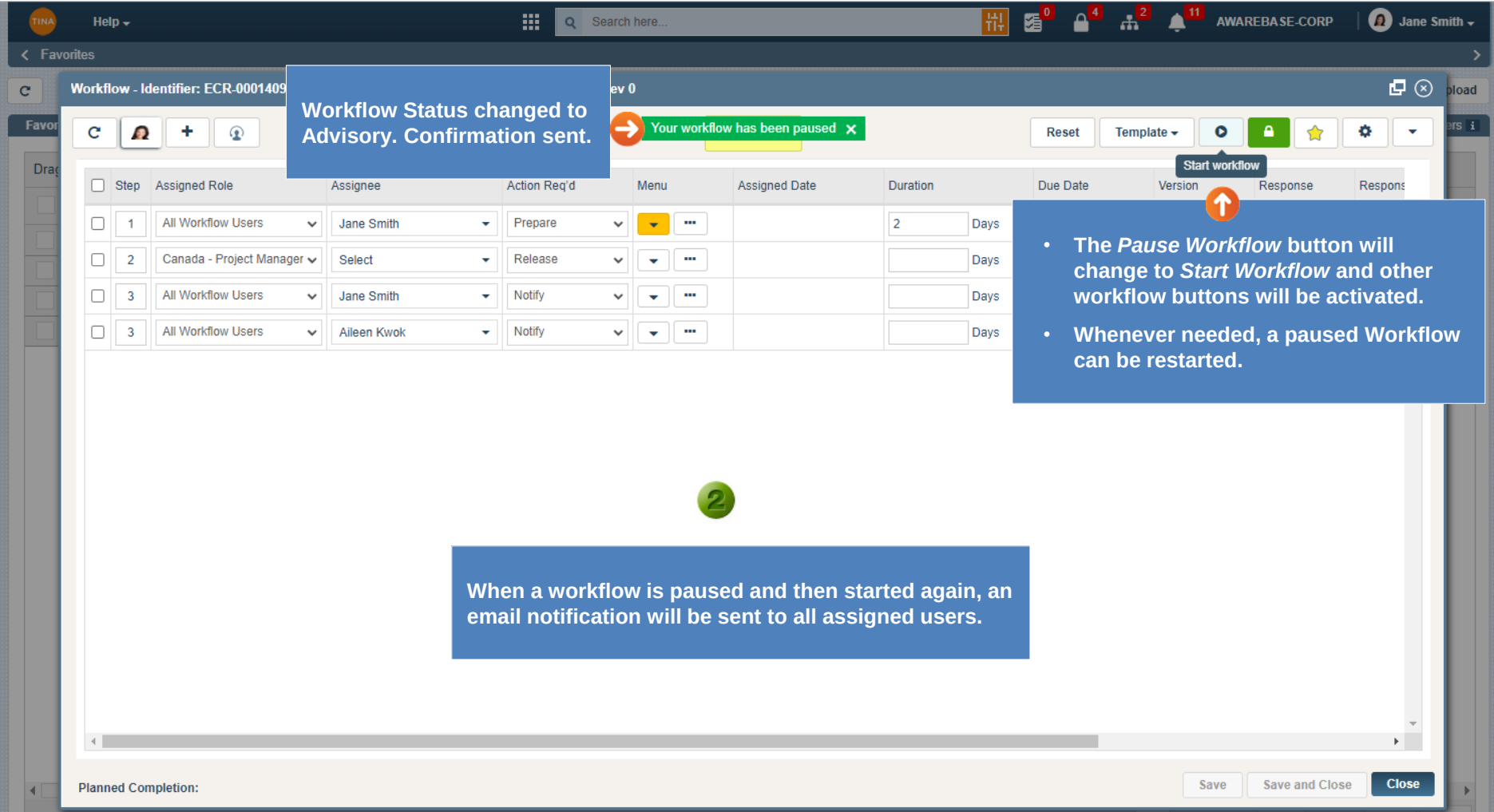


- Workflow icon will be updated to show the number of workflows assigned to you.
- Notification icon will be updated as well.

The Workflow icon has been highlighted.

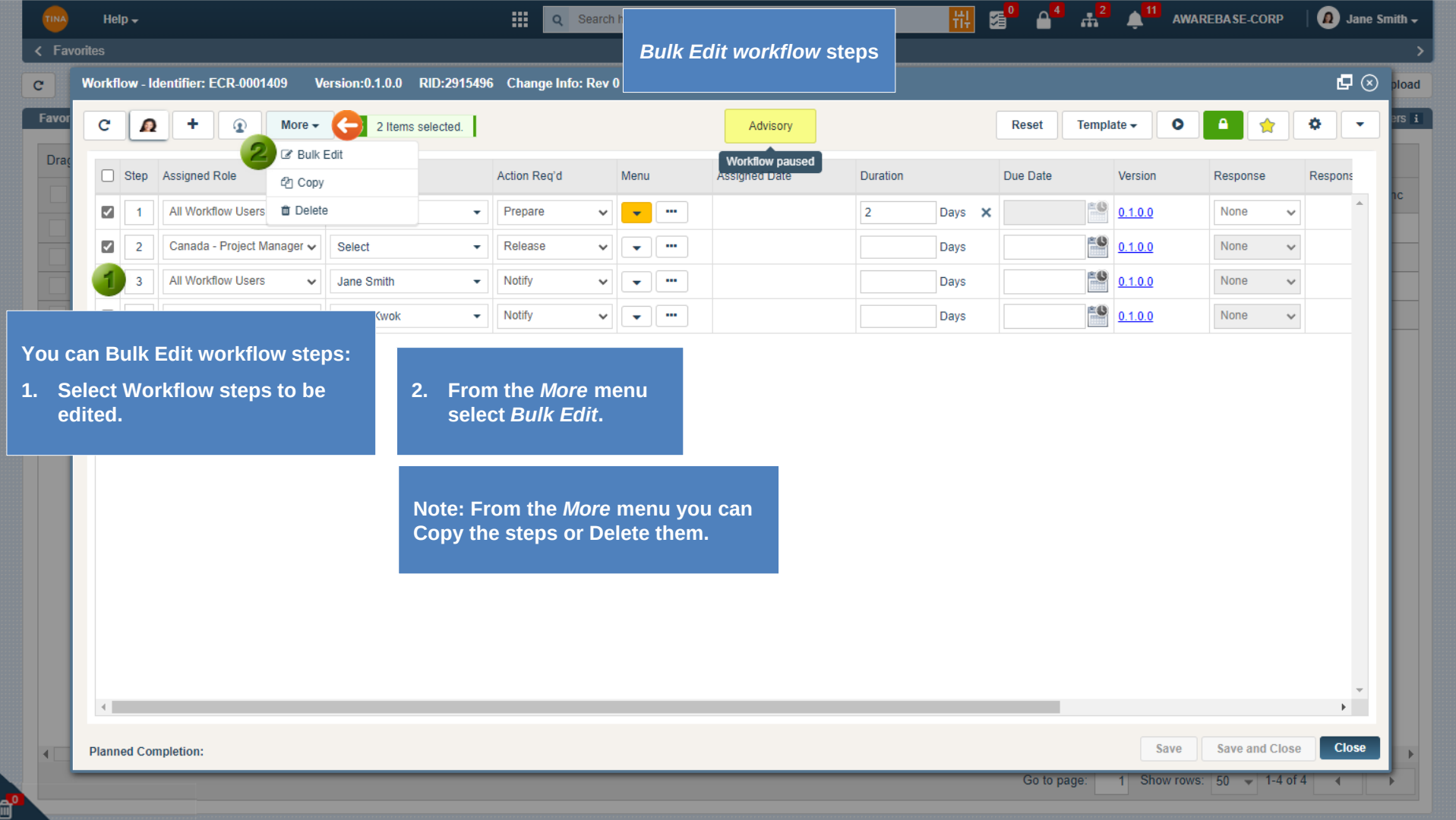
Go back to Section 10: Workflow or continue.


Workflow Status has been changed from *Advisory* to *On Track*. Hover over it to see a tool-tip.
On Track status colour is green.
The *Pause workflow* button has been activated on the Workflow Navigation Panel.
Workflow - Identifier: ECR-0001409
On Track
Reset
Template
Pause workflow
Step
Assigned Role
Assignee
Action Req'd
Menu
Assigned Date
Duration
Due Date
Version
Response
1 All Workflow Users Jane Smith Prepare 2022/09/22 2 Days 2022/09/24 0.1.0.0 None
2 Canada - Project Manager Select Release Days 0.1.0.0 None
3 All Workflow Users Jane Smith Notify Days 0.1.0.0 None
3 All Workflow Users Aileen Kwok Notify Days 0.1.0.0 None
Pause Workflow
A Workflow process can be Paused by the owner at the current step.
• Click the *Pause WF* button.
• When paused, for the assignee Workflow will be available for viewing only (read-only) and can't be modified.
Planned Completion: 2022/09/24
Save
Save and Close
Close



Go back to Section 10: Workflow or continue.

Bulk Edit workflow steps

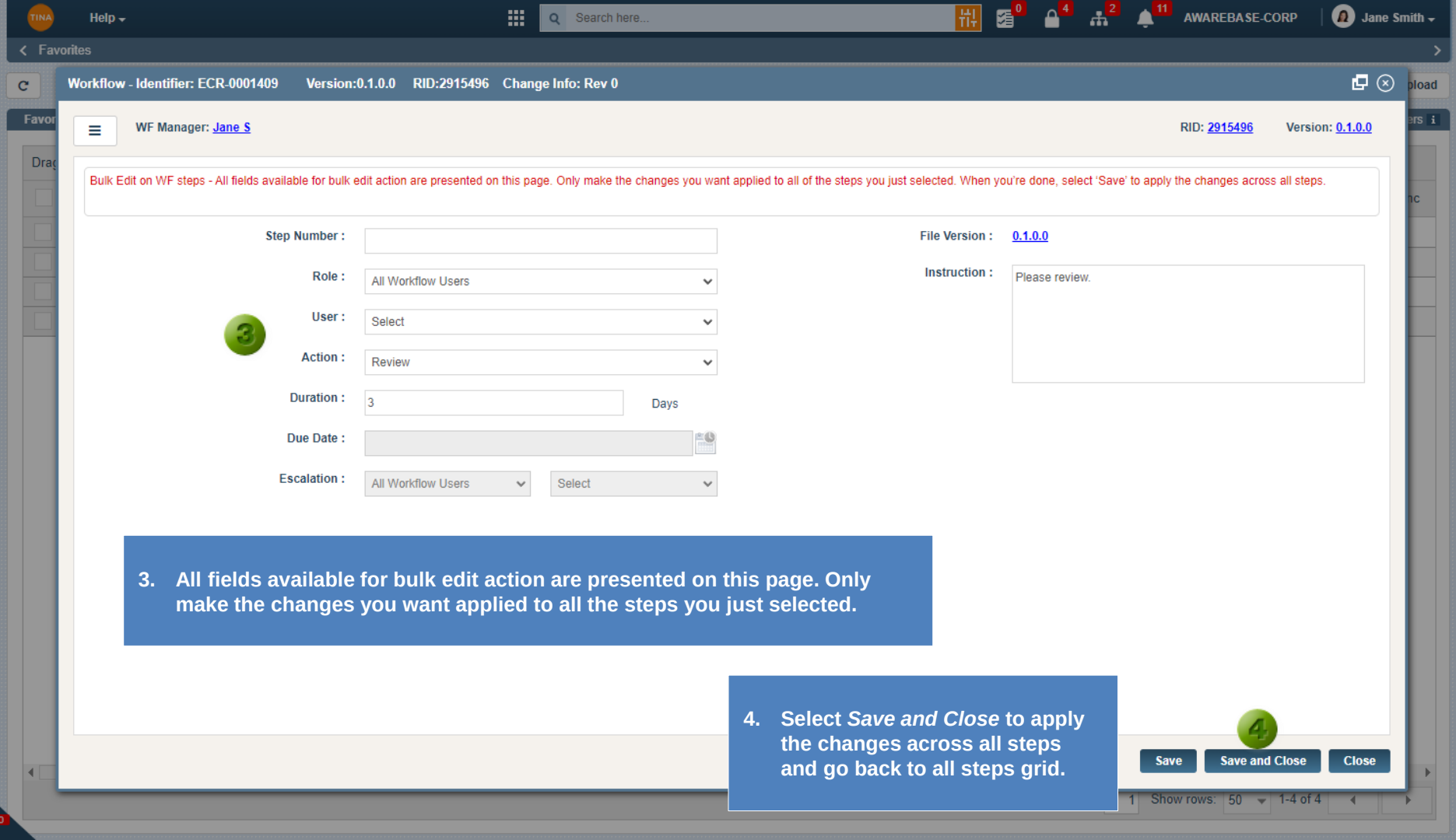


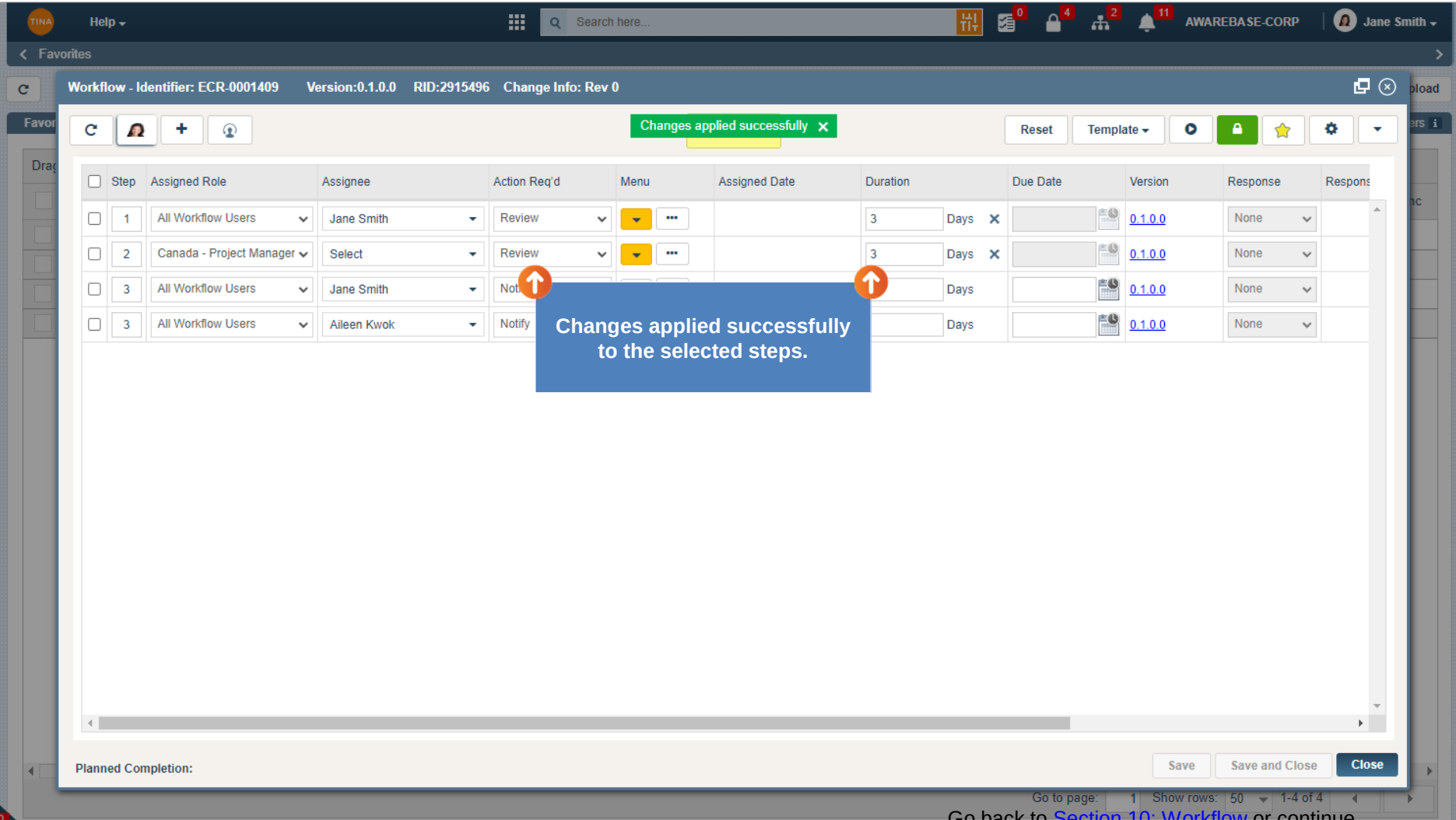
You can Bulk Edit workflow steps:

1. **Select Workflow steps to be edited.**

2. **From the *More* menu select *Bulk Edit*.**

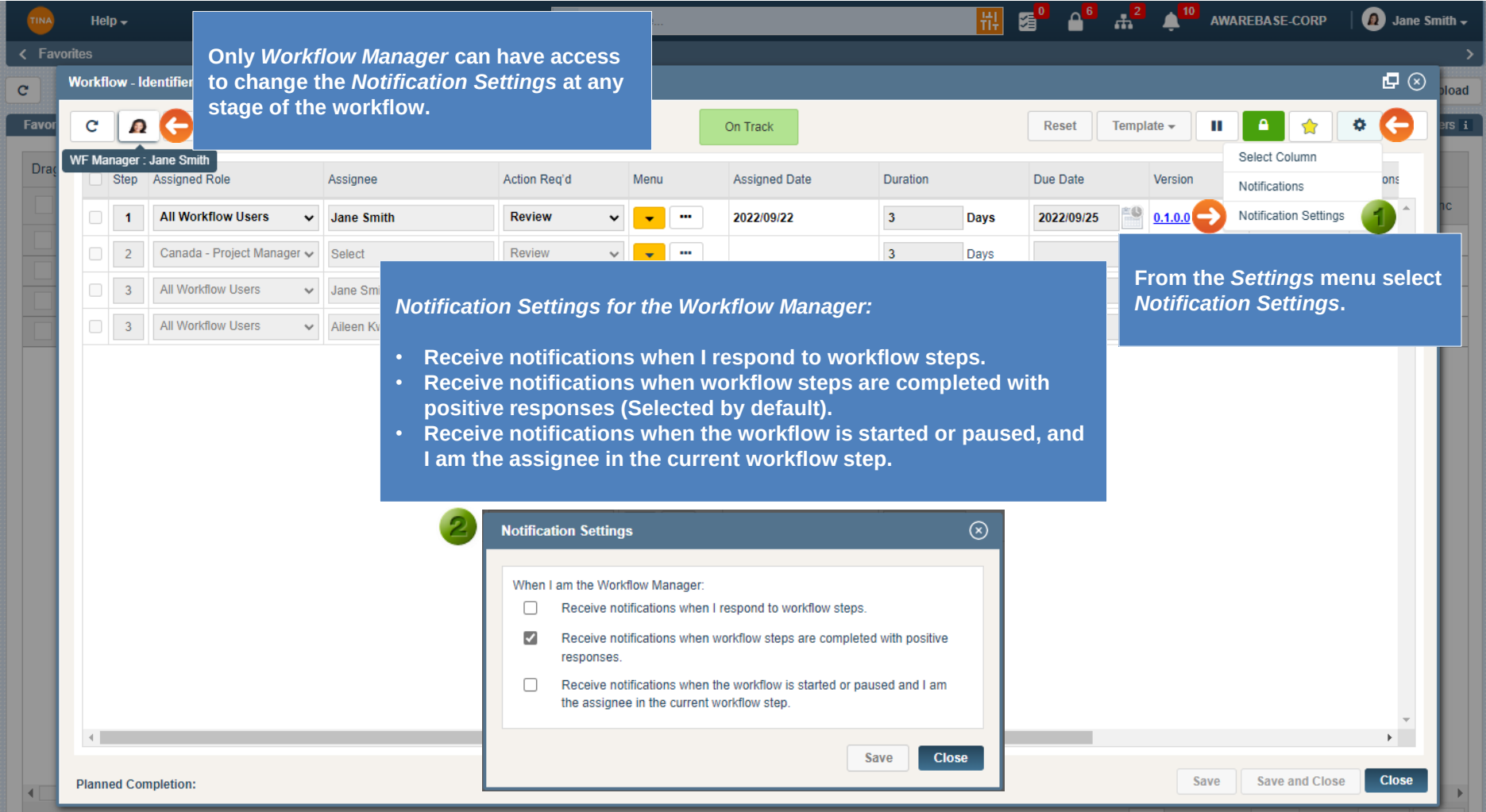
Note: From the *More* menu you can Copy the steps or Delete them.


Help
Search here...
AWAREBASE-CORP
Jane Smith
Favorites
Workflow - Identifier: ECR-0001409 Version:0.1.0.0 RID:2915496 Change Info: Rev 0
WF Manager: Jane S
RID: 2915496 Version: 0.1.0.0
Bulk Edit on WF steps - All fields available for bulk edit action are presented on this page. Only make the changes you want applied to all of the steps you just selected. When you're done, select 'Save' to apply the changes across all steps.
Step Number :
Role : All Workflow Users
User : Select
Action : Review
Duration : 3 Days
Due Date :
Escalation : All Workflow Users Select
File Version : 0.1.0.0
Instruction : Please review.
3
3. All fields available for bulk edit action are presented on this page. Only make the changes you want applied to all the steps you just selected.
4
4. Select Save and Close to apply the changes across all steps and go back to all steps grid.
Save
Save and Close
Close



Go back to Section 10: Workflow or continue.

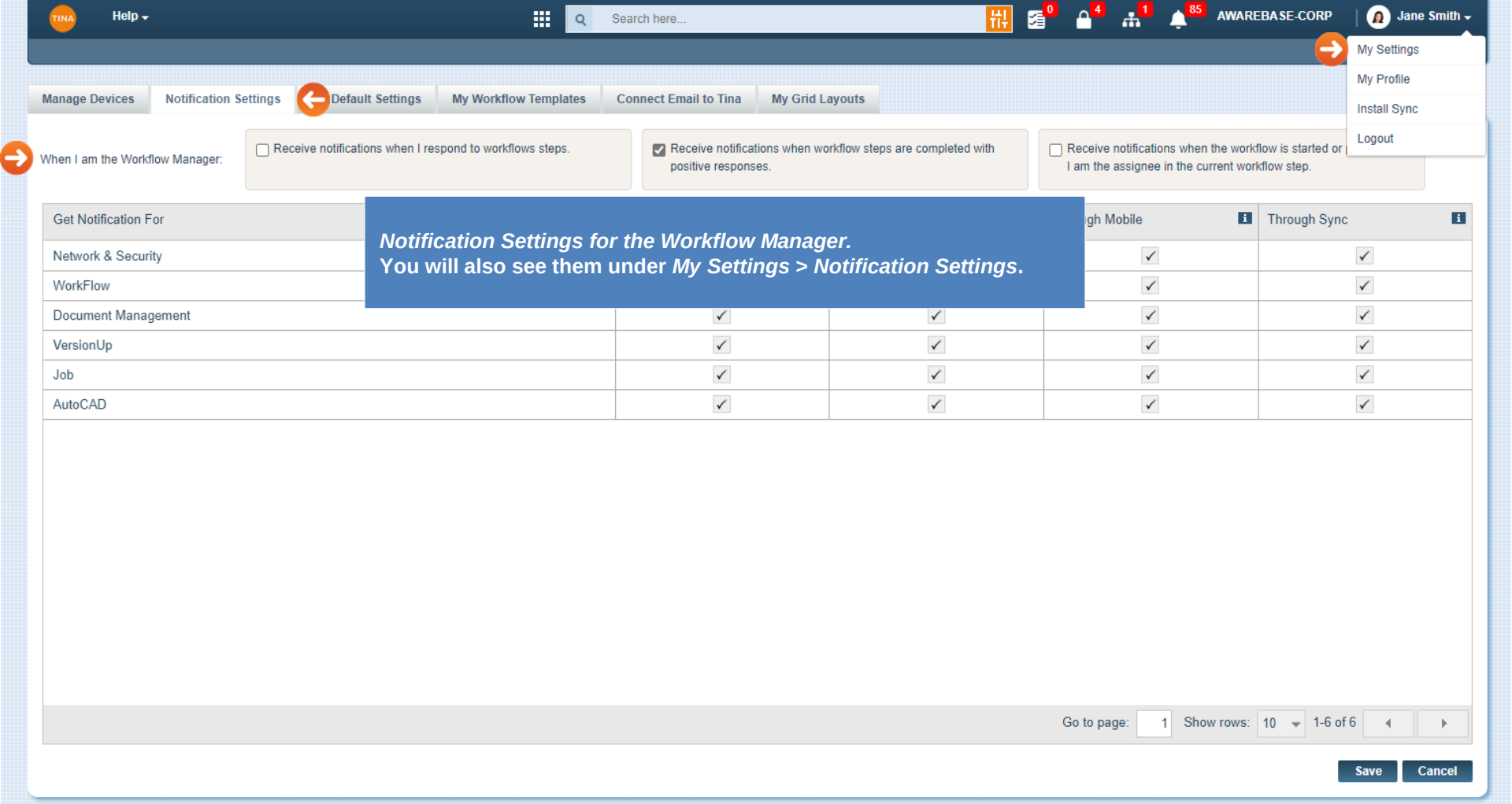
Only *Workflow Manager* can have access to change the *Notification Settings* at any stage of the workflow.



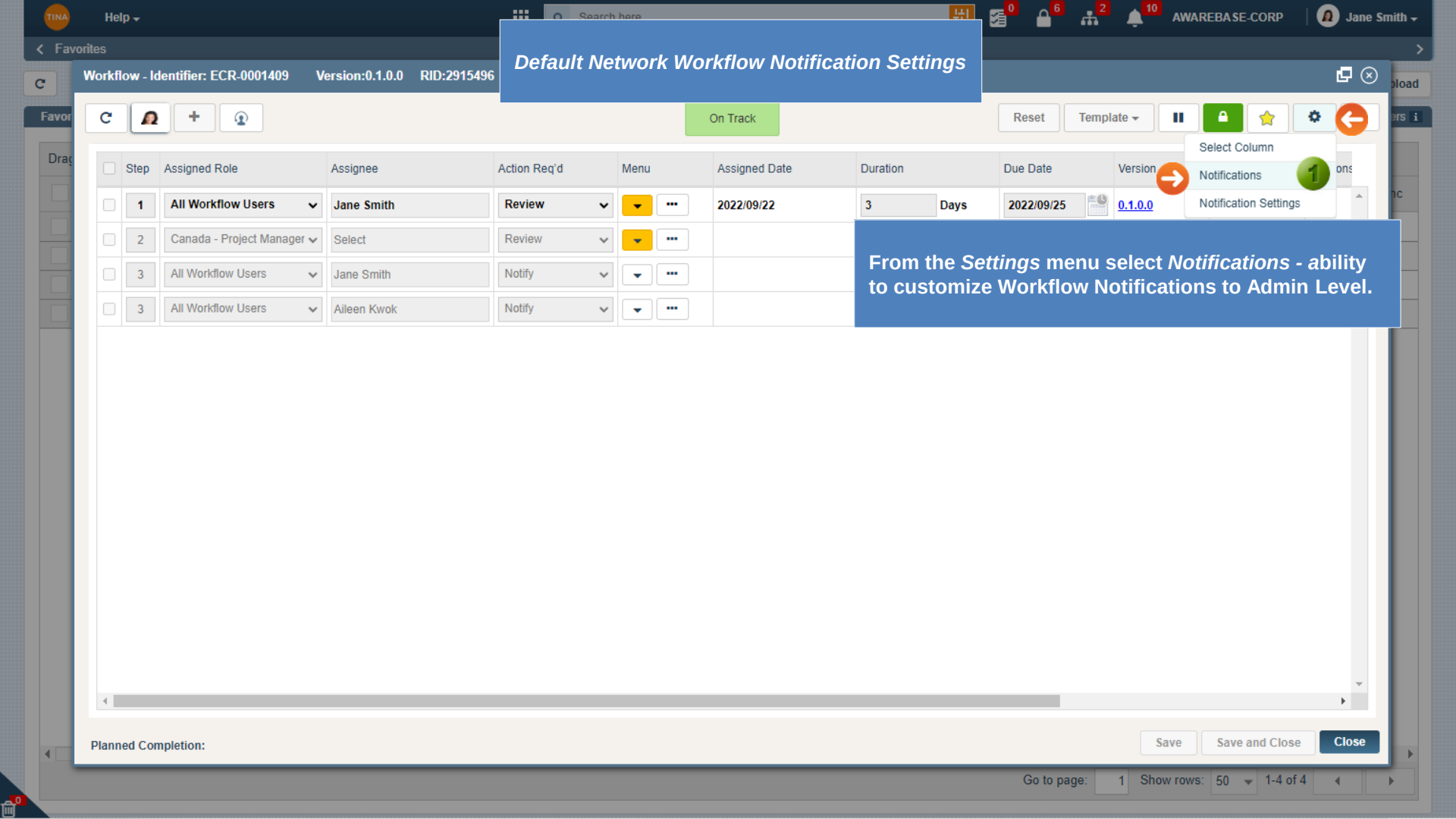
From the *Settings* menu select *Notification Settings*.

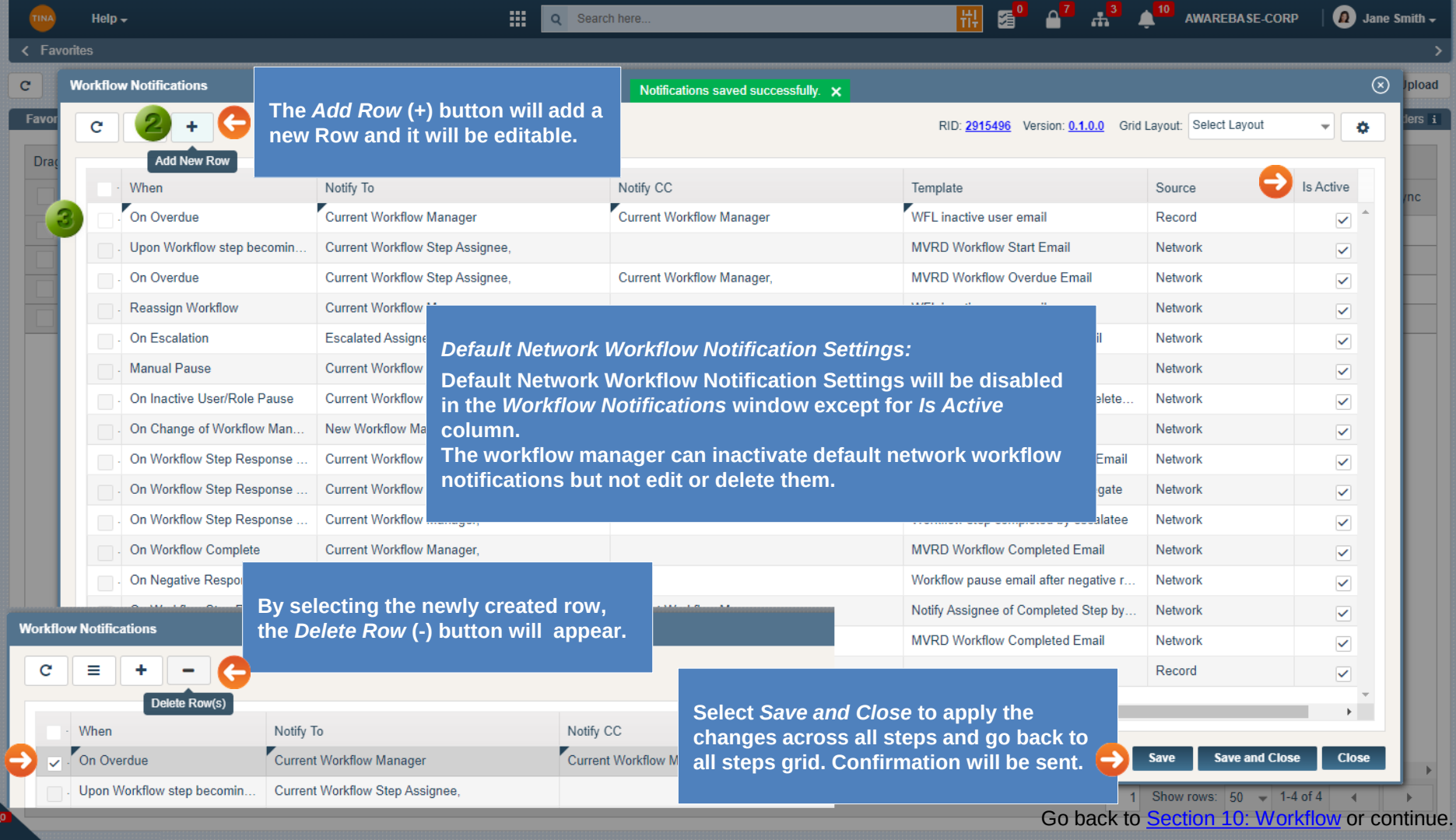
Notification Settings for the Workflow Manager:

- Receive notifications when I respond to workflow steps.
- Receive notifications when workflow steps are completed with positive responses (Selected by default).
- Receive notifications when the workflow is started or paused, and I am the assignee in the current workflow step.

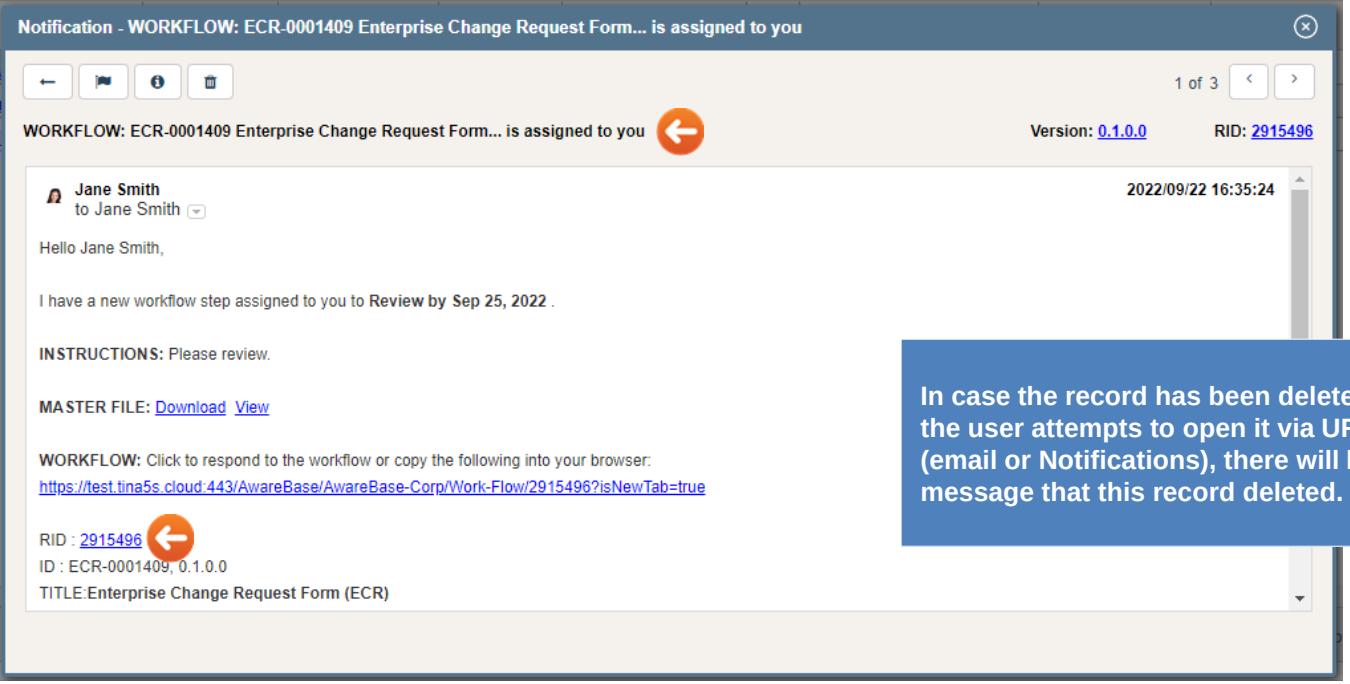


Go back to Section 10: Workflow or continue.


Default Network Workflow Notification Settings
Workflow - Identifier: ECR-0001409
Version:0.1.0.0
RID:2915496
On Track
Reset
Template
Select Column
Notifications
Notification Settings
Step
Assigned Role
Assignee
Action Req'd
Menu
Assigned Date
Duration
Due Date
Version
1
All Workflow Users
Jane Smith
Review
2022/09/22
3
Days
2022/09/25
0.1.0.0
2
Canada - Project Manager
Select
Review
3
All Workflow Users
Jane Smith
Notify
3
All Workflow Users
Aileen Kwok
Notify
From the Settings menu select Notifications - ability to customize Workflow Notifications to Admin Level.
Planned Completion:
Save
Save and Close
Close

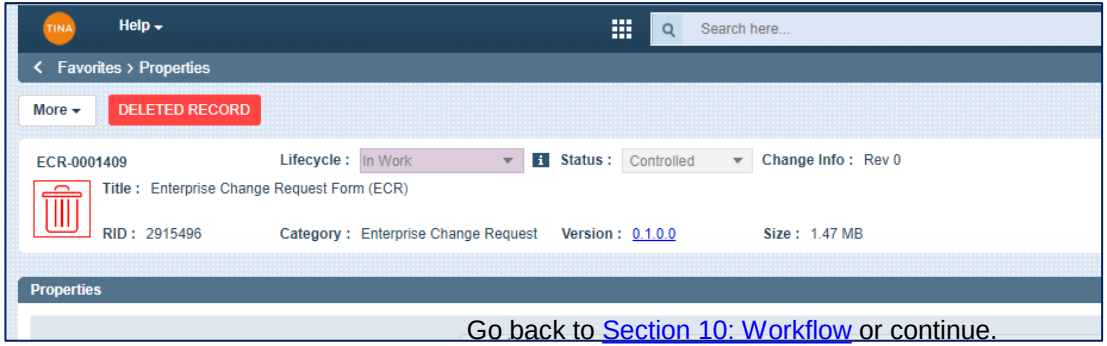


Go back to Section 10: Workflow or continue.

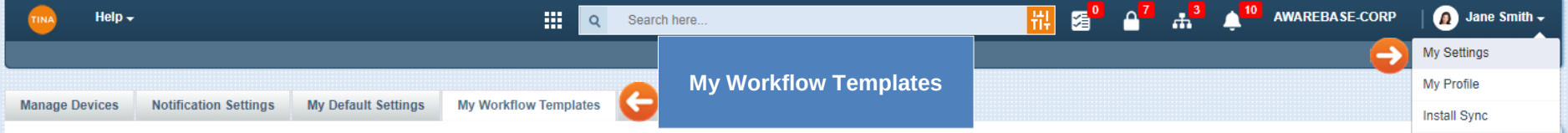


In case the record has been deleted, but the user attempts to open it via URL (email or Notifications), there will be a message that this record deleted.

The file icon will be replaced with red trash can icon.



Go back to Section 10: Workflow or continue.



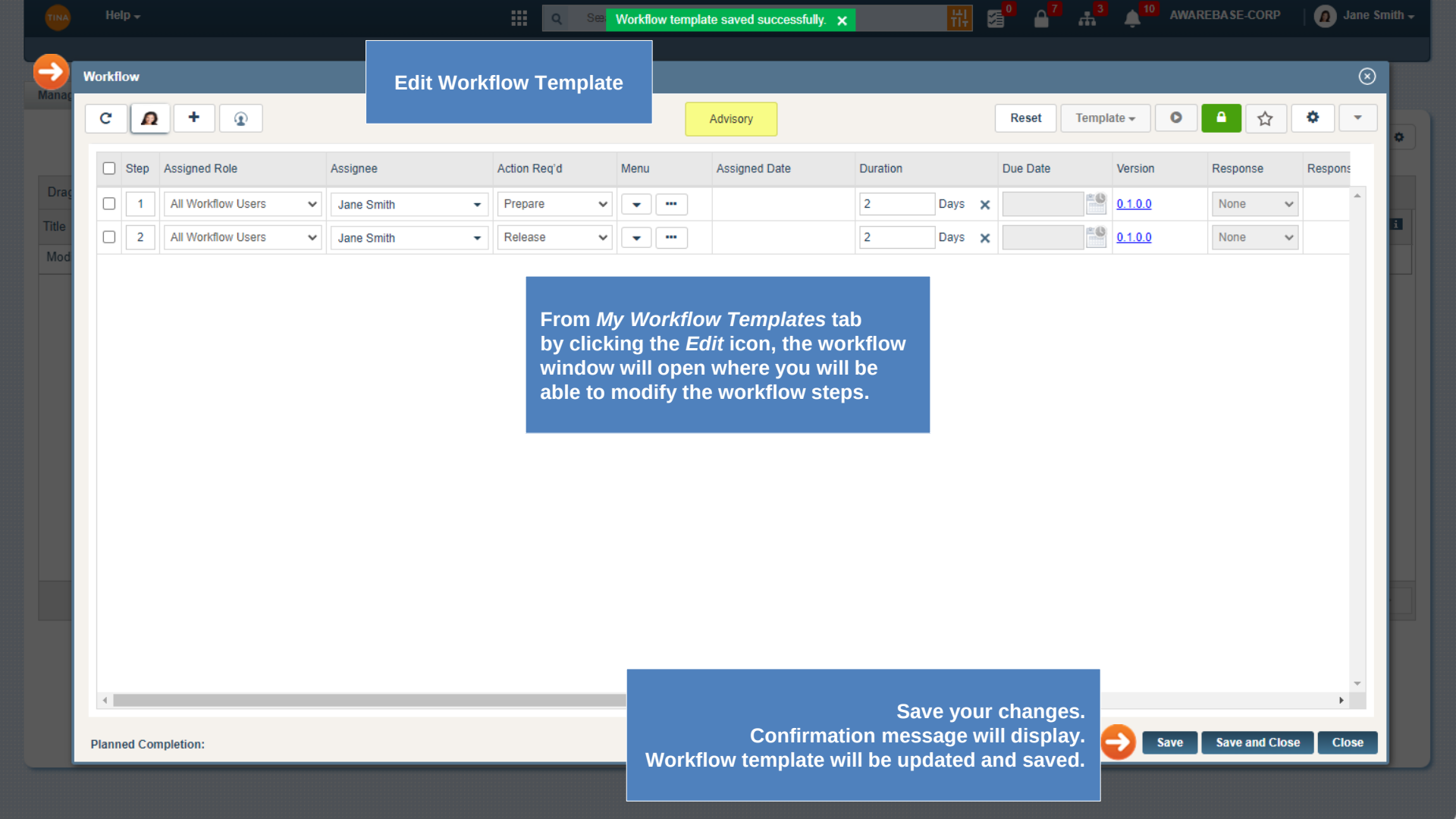
Drag a column and drop it here to group by that column

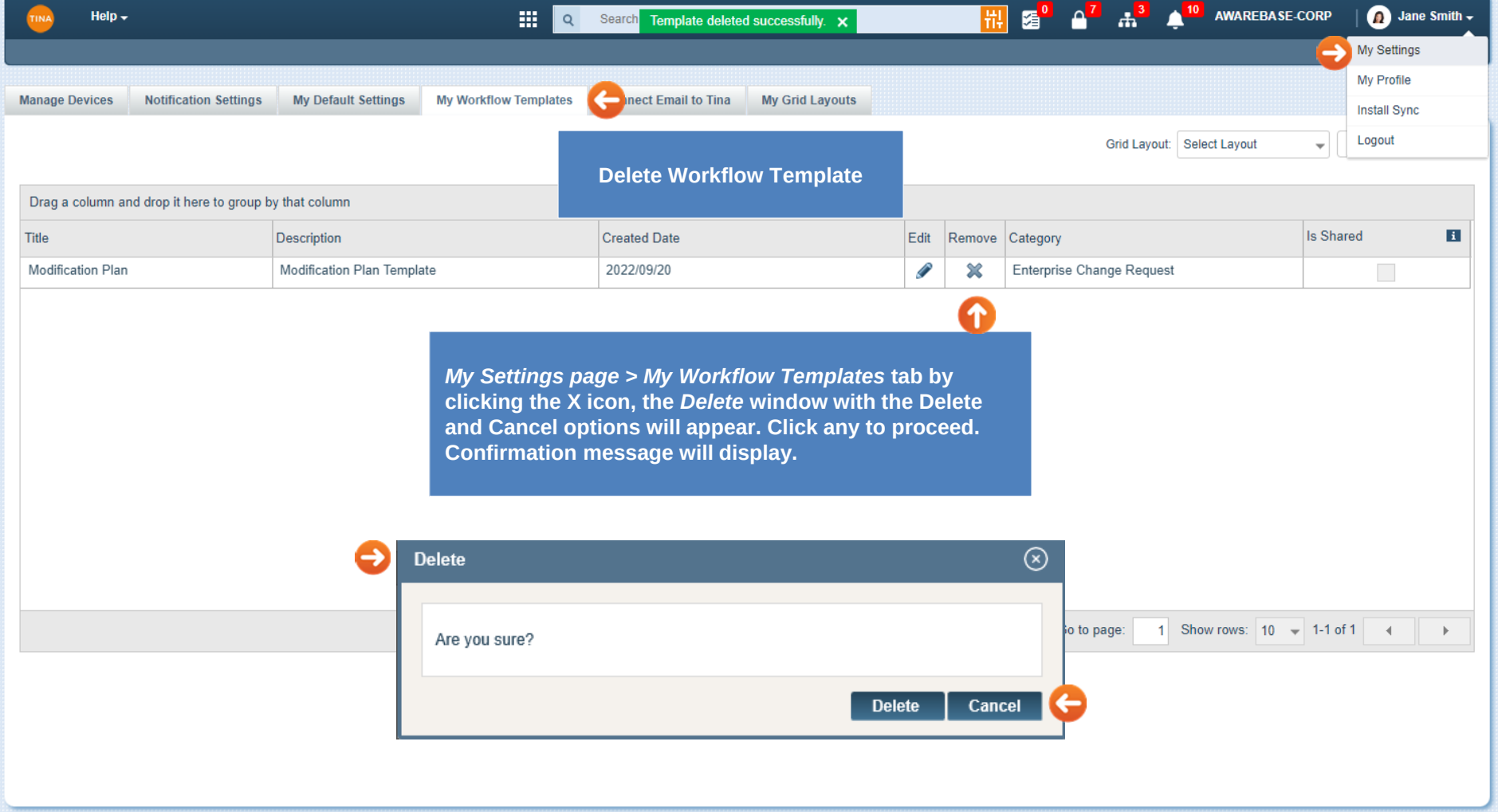
Title	Description	Created Date	Edit	Remove	Category	Is Shared
Modification Plan	Modification Plan Template	2022/09/20			Enterprise Change Request	

Go to page: 1 Show rows: 10 1-1 of 1

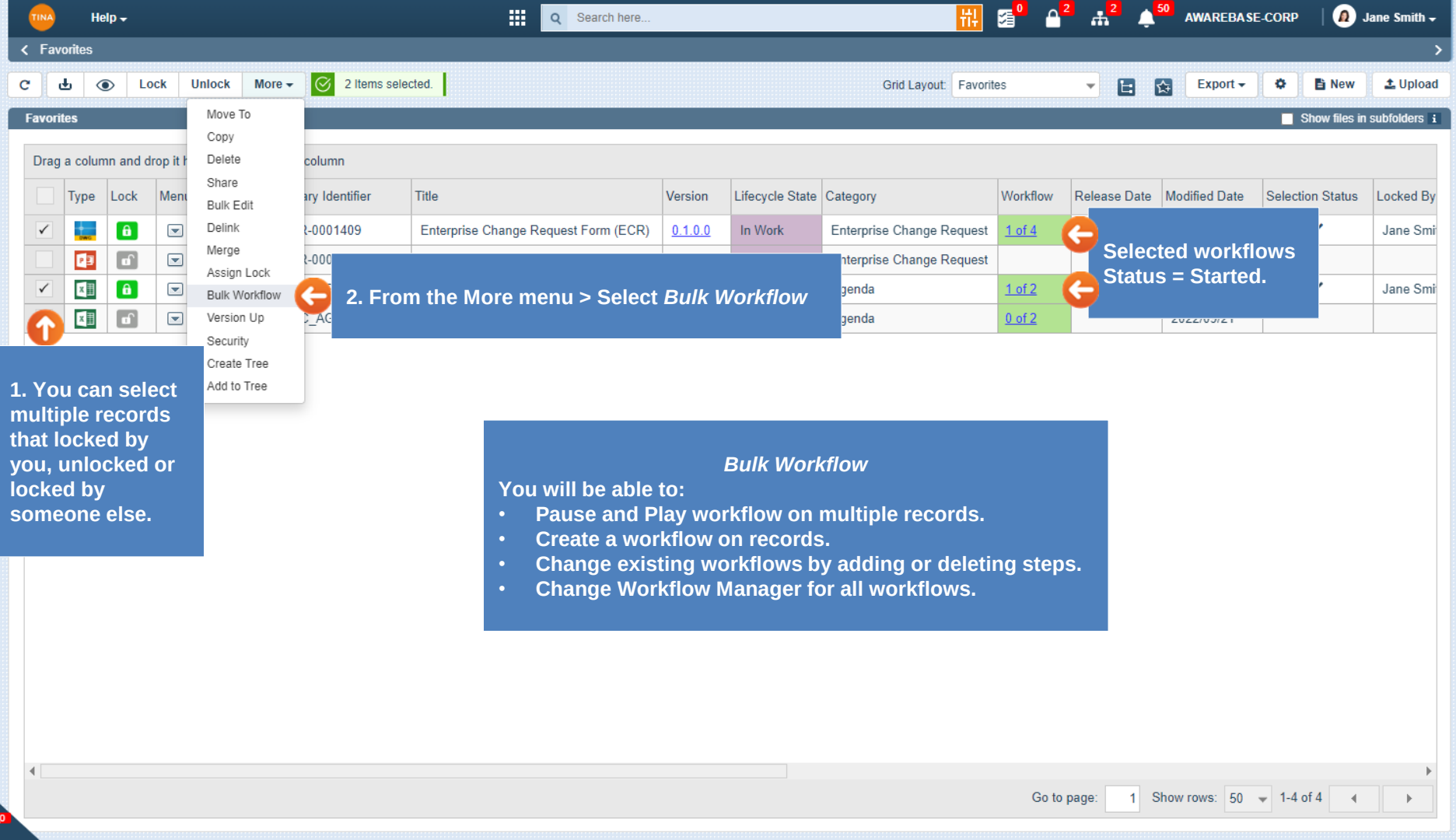
From *My Settings page > My Workflow Templates* tab you can **Edit** or **Delete** workflow template which is created by you.
Note: No matter that workflow template is used or not used by any user.

Note:
Workflow Templates **tab will be available for the Network Admin in the Admin section. Network Admin can delete the template anytime.**

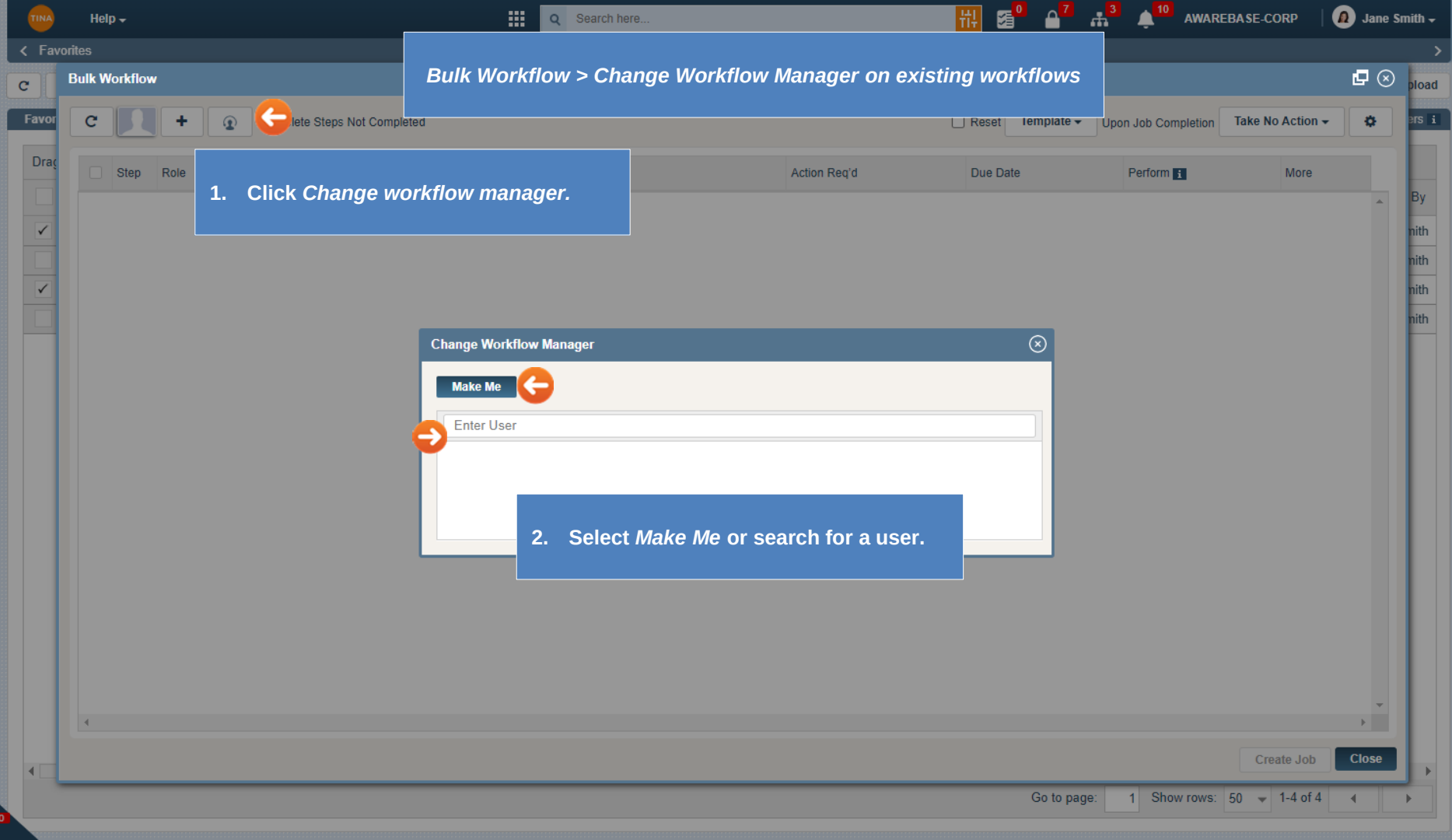

Help
Workflow template saved successfully.
AWAREBASE-CORP
Jane Smith
Workflow
Edit Workflow Template
Advisory
Reset
Template
Step
Assigned Role
Assignee
Action Req'd
Menu
Assigned Date
Duration
Due Date
Version
Response
1
All Workflow Users
Jane Smith
Prepare
2
Days
0.1.0.0
None
2
All Workflow Users
Jane Smith
Release
2
Days
0.1.0.0
None
From My Workflow Templates tab by clicking the Edit icon, the workflow window will open where you will be able to modify the workflow steps.
Planned Completion:
Save your changes.
Confirmation message will display.
Workflow template will be updated and saved.
Save
Save and Close
Close



Go back to Section 10: Workflow or continue.

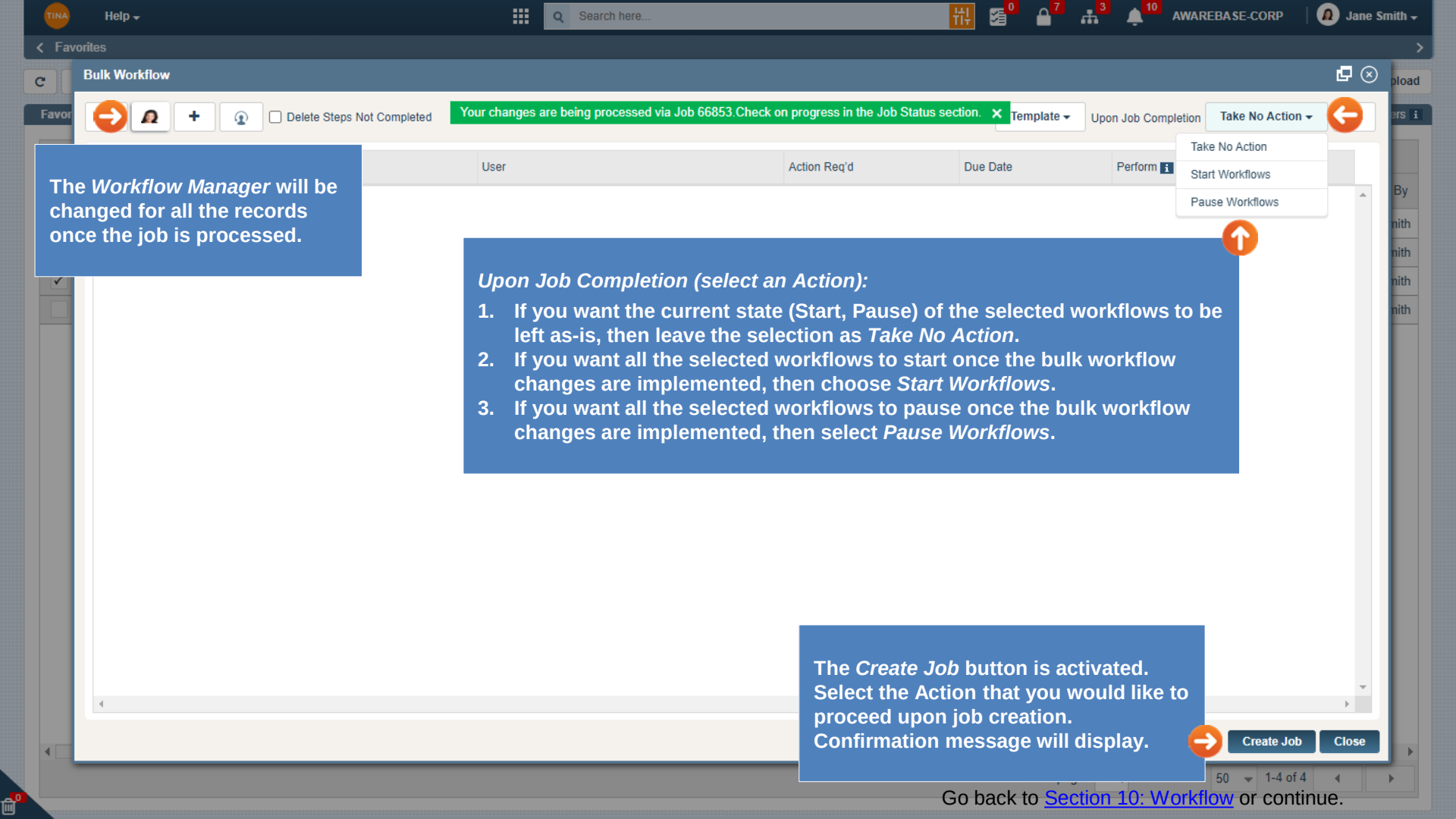

Help
Search here...
AWAREBASE-CORP
Jane Smith
Favorites
Lock
Unlock
More
2 Items selected.
Grid Layout:
Favorites
Export
New
Upload
Favorites
Show files in subfolders
Move To
Copy
Delete
Share
Bulk Edit
Delink
Merge
Assign Lock
Bulk Workflow
Version Up
Security
Create Tree
Add to Tree
Drag a column and drop it h
column
Type
Lock
Menu
ary Identifier
Title
Version
Lifecycle State
Category
Workflow
Release Date
Modified Date
Selection Status
Locked By
-0001409
Enterprise Change Request Form (ECR)
0.1.0.0
In Work
Enterprise Change Request
1 of 4
Jane Smi
nterprise Change Request
genda
1 of 2
Jane Smi
genda
0 of 2
1. You can select multiple records that locked by you, unlocked or locked by someone else.
2. From the More menu > Select Bulk Workflow
Selected workflows Status = Started.
Bulk Workflow
You will be able to:
• Pause and Play workflow on multiple records.
• Create a workflow on records.
• Change existing workflows by adding or deleting steps.
• Change Workflow Manager for all workflows.
Go to page:
1
Show rows:
50
1-4 of 4

Bulk Workflow > Change Workflow Manager on existing workflows



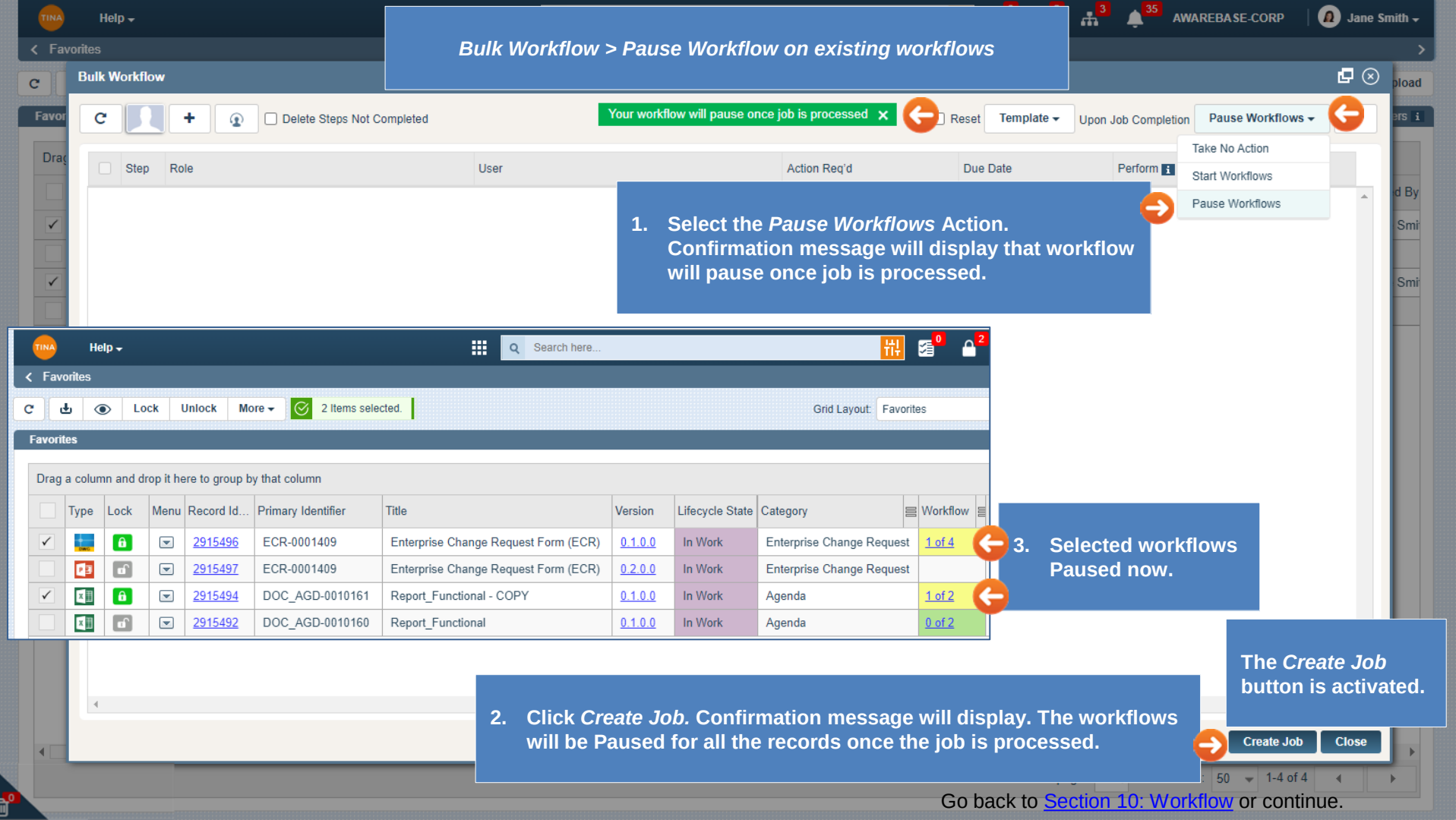
1. Click *Change workflow manager.*

2. Select *Make Me* or search for a user.



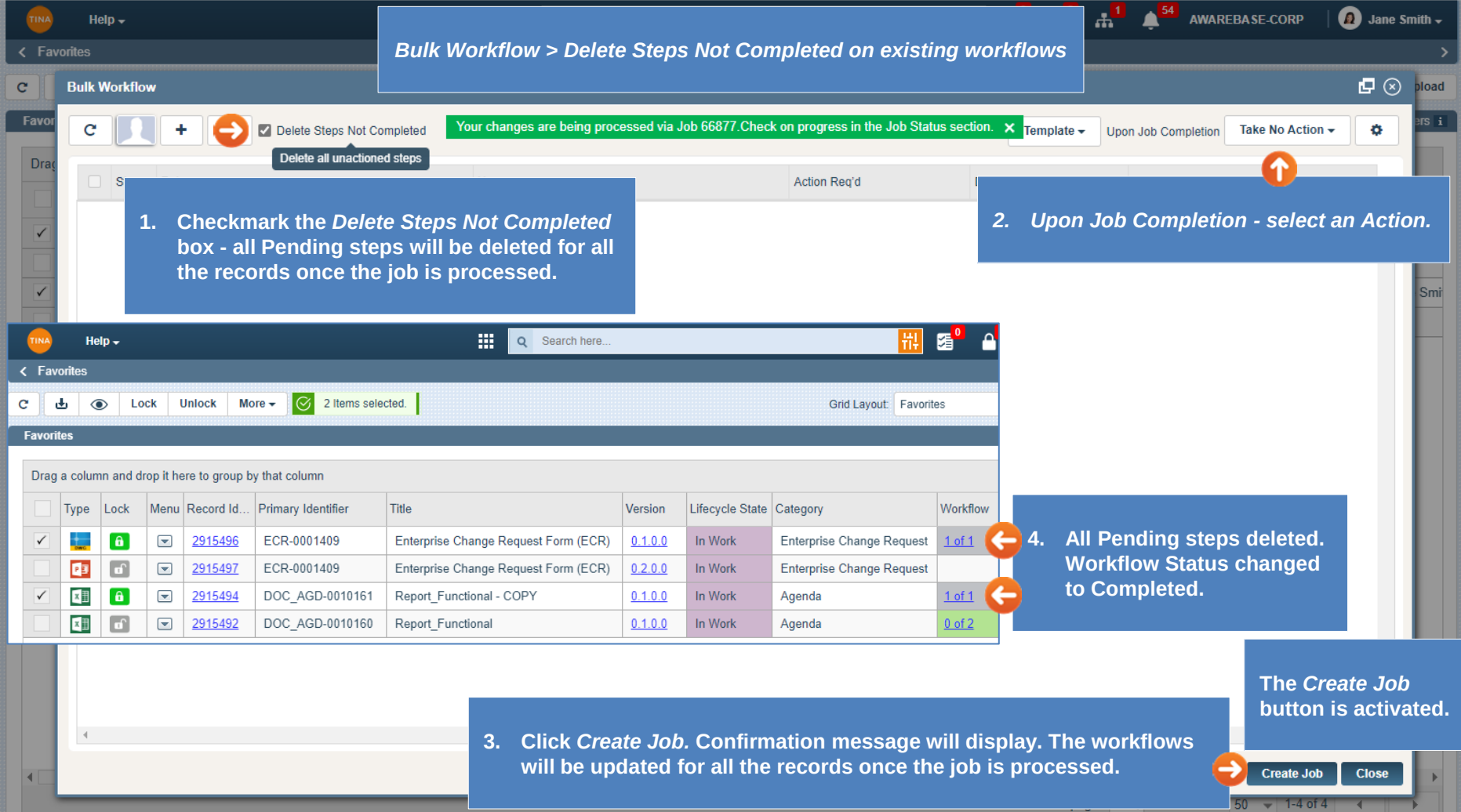
Go back to Section 10: Workflow or continue.

Bulk Workflow > Pause Workflow on existing workflows

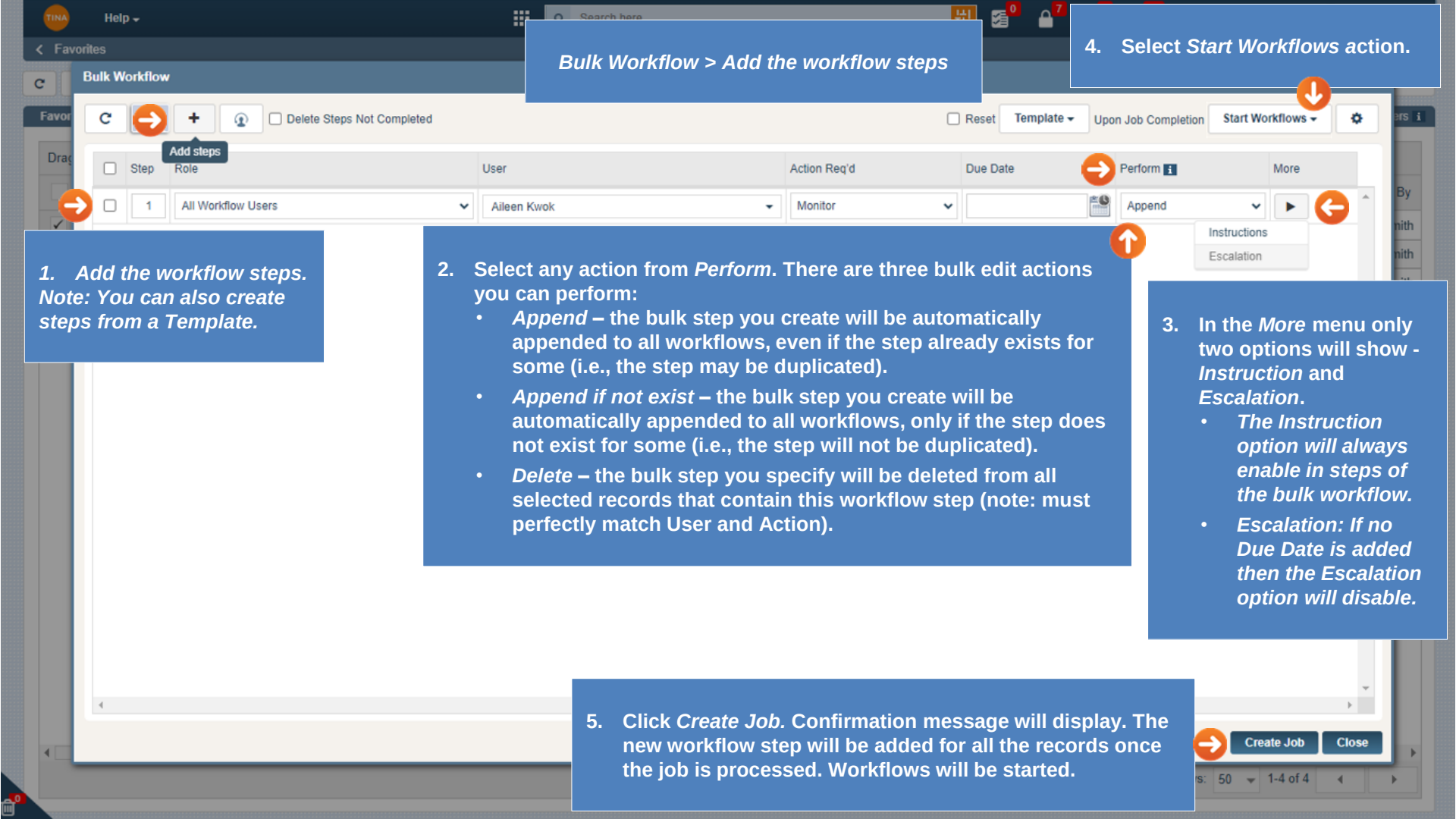


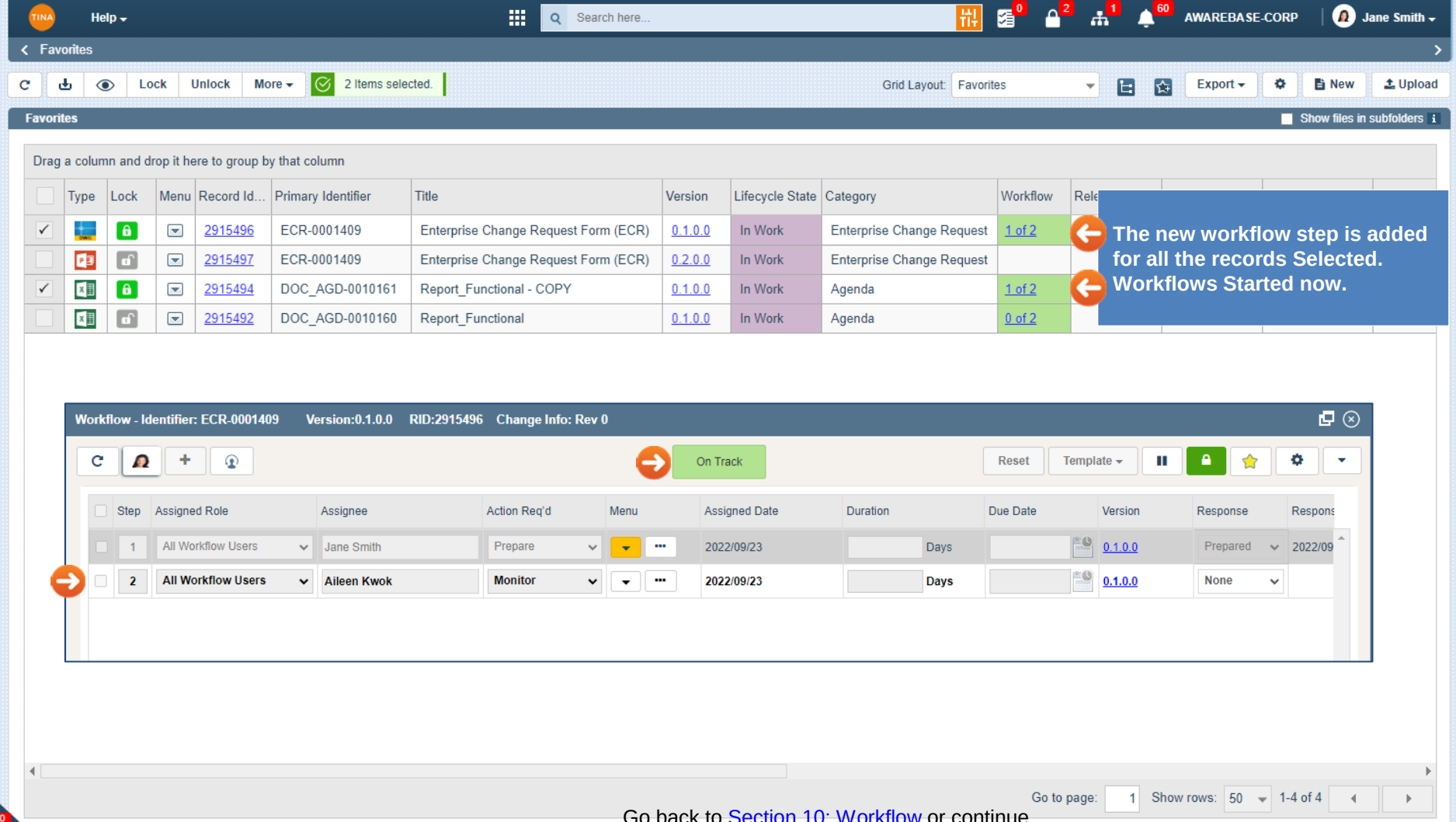
Go back to Section 10: Workflow or continue.

Bulk Workflow > Delete Steps Not Completed on existing workflows

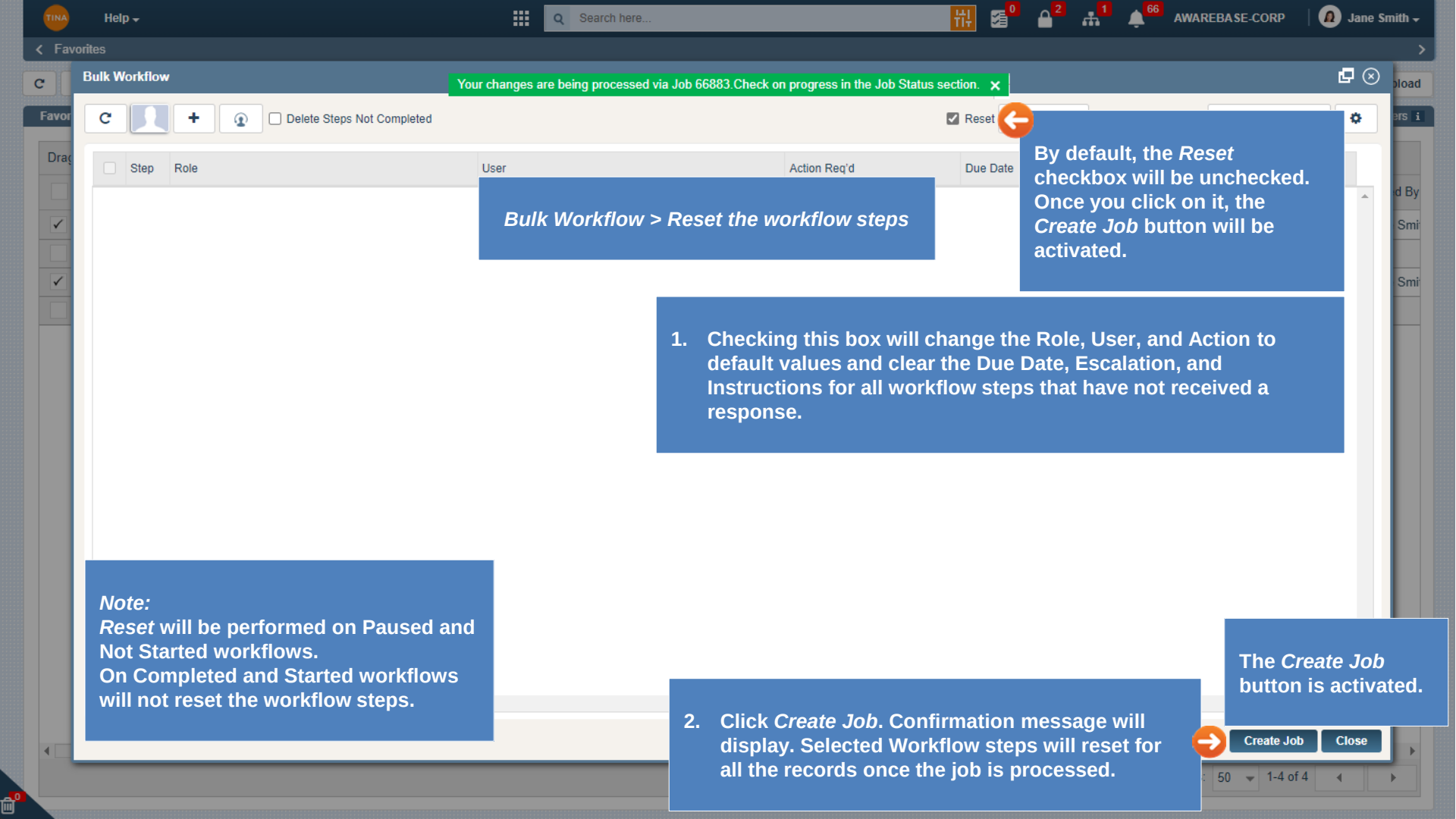


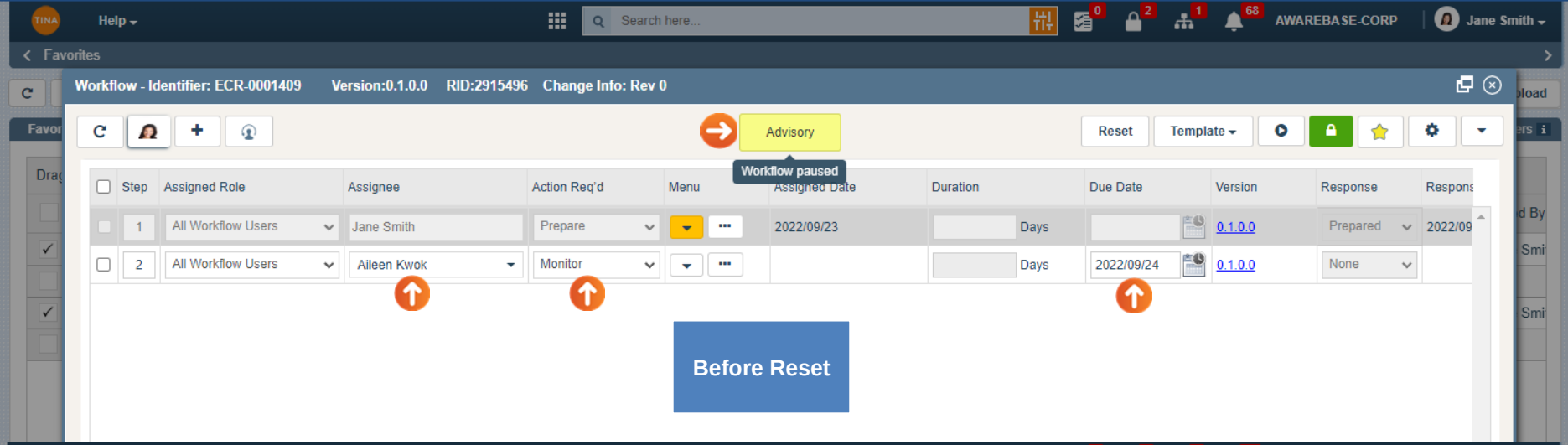
Go back to Section 10: Workflow or continue.

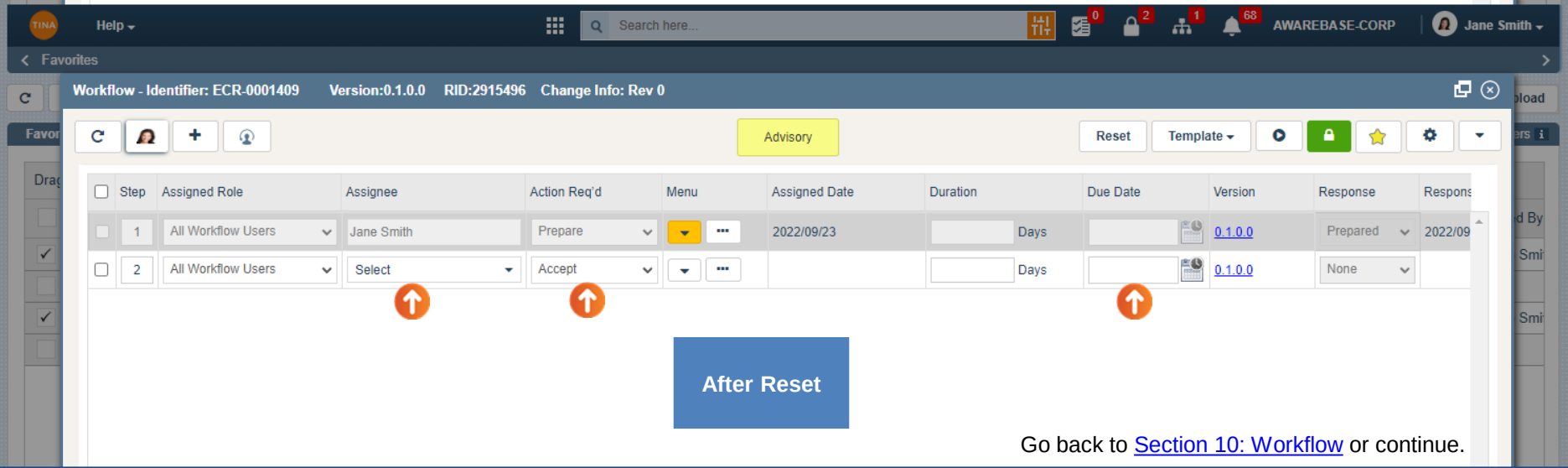

Bulk Workflow > Add the workflow steps
4. Select Start Workflows action.
Bulk Workflow
Add steps
Delete Steps Not Completed
Reset
Template
Upon Job Completion
Start Workflows
Step
Role
User
Action Req'd
Due Date
Perform
More
1
All Workflow Users
Aileen Kwok
Monitor
Append
Instructions
Escalation
1. Add the workflow steps. Note: You can also create steps from a Template.
2. Select any action from Perform. There are three bulk edit actions you can perform:
• Append – the bulk step you create will be automatically appended to all workflows, even if the step already exists for some (i.e., the step may be duplicated).
• Append if not exist – the bulk step you create will be automatically appended to all workflows, only if the step does not exist for some (i.e., the step will not be duplicated).
• Delete – the bulk step you specify will be deleted from all selected records that contain this workflow step (note: must perfectly match User and Action).
3. In the More menu only two options will show - Instruction and Escalation.
• The Instruction option will always enable in steps of the bulk workflow.
• Escalation: If no Due Date is added then the Escalation option will disable.
5. Click Create Job. Confirmation message will display. The new workflow step will be added for all the records once the job is processed. Workflows will be started.
Create Job
Close
1-4 of 4



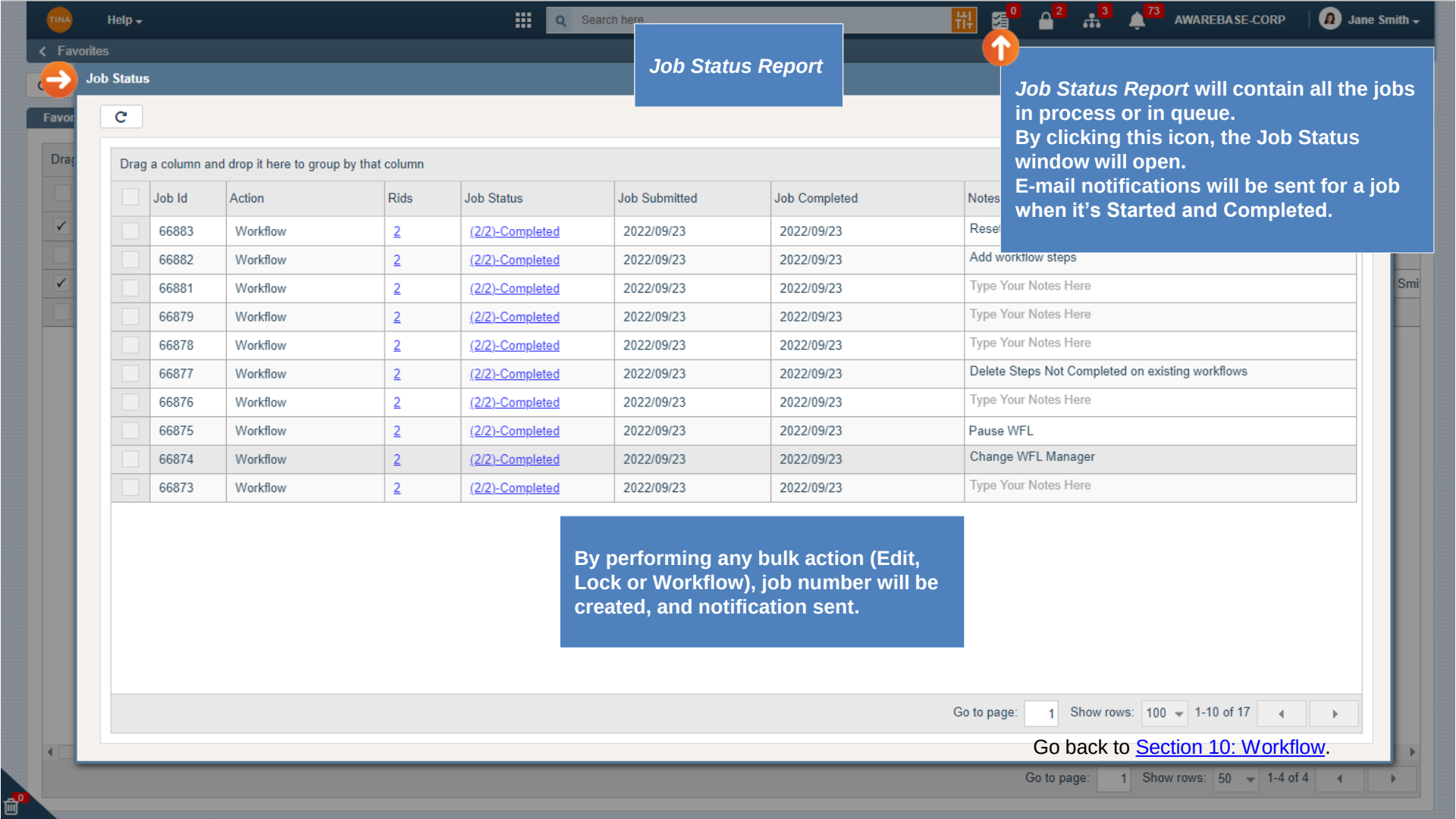
Go back to Section 10: Workflow or continue.


Help
Search here...
AWAREBASE-CORP
Jane Smith
Favorites
Bulk Workflow
Your changes are being processed via Job 66883.Check on progress in the Job Status section.
Delete Steps Not Completed
Reset
Step
Role
User
Action Req'd
Due Date
Bulk Workflow > Reset the workflow steps
By default, the Reset checkbox will be unchecked. Once you click on it, the Create Job button will be activated.
1. Checking this box will change the Role, User, and Action to default values and clear the Due Date, Escalation, and Instructions for all workflow steps that have not received a response.
Note:
Reset will be performed on Paused and Not Started workflows.
On Completed and Started workflows will not reset the workflow steps.
2. Click Create Job. Confirmation message will display. Selected Workflow steps will reset for all the records once the job is processed.
The Create Job button is activated.
Create Job
Close
50
1-4 of 4





Go back to Section 10: Workflow or continue.


Help
Search here
AWAREBASE-CORP
Jane Smith
Favorites
Job Status
Job Status Report
Job Status Report will contain all the jobs in process or in queue.
By clicking this icon, the Job Status window will open.
E-mail notifications will be sent for a job when it's Started and Completed.
Drag a column and drop it here to group by that column
Job Id
Action
Rids
Job Status
Job Submitted
Job Completed
Notes
66883 Workflow 2 (2/2)-Completed 2022/09/23 2022/09/23
66882 Workflow 2 (2/2)-Completed 2022/09/23 2022/09/23 Add workflow steps
66881 Workflow 2 (2/2)-Completed 2022/09/23 2022/09/23 Type Your Notes Here
66879 Workflow 2 (2/2)-Completed 2022/09/23 2022/09/23 Type Your Notes Here
66878 Workflow 2 (2/2)-Completed 2022/09/23 2022/09/23 Type Your Notes Here
66877 Workflow 2 (2/2)-Completed 2022/09/23 2022/09/23 Delete Steps Not Completed on existing workflows
66876 Workflow 2 (2/2)-Completed 2022/09/23 2022/09/23 Type Your Notes Here
66875 Workflow 2 (2/2)-Completed 2022/09/23 2022/09/23 Pause WFL
66874 Workflow 2 (2/2)-Completed 2022/09/23 2022/09/23 Change WFL Manager
66873 Workflow 2 (2/2)-Completed 2022/09/23 2022/09/23 Type Your Notes Here
By performing any bulk action (Edit, Lock or Workflow), job number will be created, and notification sent.
Go to page: 1 Show rows: 100 1-10 of 17
Go back to Section 10: Workflow.
Go to page: 1 Show rows: 50 1-4 of 4