

# 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](#)

Favorites

Favorites

**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.

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

Type	Lock	Menu	Record Id...	Primary Identifier	Release Date	Modified Date	Selection Status	Locked By
			g	<a href="#">0.1.0.0</a>	In Work	Enterprise Change Request	2022/09/21	Jane Smith
			g	<a href="#">0.2.0.0</a>	In Work	Enterprise Change Request	2022/09/21	Jane Smith
			ne	<a href="#">0.1.0.0</a>	In Work	Agenda	2022/09/21	Jane Smith
			ne	<a href="#">0.1.0.0</a>	In Work	Agenda	2022/09/21	Jane Smith

- Discussion
- Files
- Rename
- Security
- Related
- Tree
- Upload
- Vers Hist
- Vers Up
- Where
- Workflow

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

## Workflow Manager

## Workflow Status

The process will automatically flow from step to the other once started. Workflow Status will change accordingly.

## Reset Workflow

## Menu

## Add Workflow Steps

Application will provide a convenient method for adding and re-ordering Workflow steps in the Workflow.

- Only the workflow owner can control the workflow steps.
- Only the workflow owner can add, edit or delete a workflow step.

## Workflow Template

You will have the ability to select the following options:

- [Save as Template](#) – you can define all the Workflow steps under the Workflow window and save this Workflow as a Template.
- [Select from Template](#) - select to use an existing template. After selecting the template, the system will insert the Workflow Tasks/Steps for the selected template under the Workflow window for the selected object.

## Start and Pause a Workflow

Workflow Owner can:

- Start, and
- Pause a Workflow (stops a Workflow at the current step).

Navigation panel will be activated on it in order to start or pause it.

## Workflow window

Planned Completion:

Save Save and Close Close

Go to page: 1 Show rows: 50 1-4 of 4

Go back to [Section 10: Workflow](#) or continue.

All users with the *Change WFL Manager* permission will see an additional button (*Change workflow manager*) on the Workflow window.

You can set yourself as Workflow Manager by clicking the *Make Me* button or give the Workflow Manager to anyone else by searching/selecting the user). Notification will be sent to the users.


Note: You don't have to be an object owner.

You will see the Workflow Manager at the top of the Workflow. Tool-tip will display WF Manager name.

Change Workflow Manager

Make Me

ste

 Steven Gentles

Note: Only the workflow manager can control (add, edit or delete) the workflow steps.

Planned Completion:

Save Save and Close Close

## Save Workflow as 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.

Save as Template

Select from Template

Reset

Template

Response

Response Date

Workflow - Identifier: ECR-0001409 Version:0.1.0.0 RID:2915496 Ch

Not Started



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

Not Started    Reset    Template ▾    [Lock]    [Star]    [Settings]    [Dropdown]

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	▾	
2	All Workflow Users ▾	Jane Smith ▾	Release ▾	⌵ ...		Days		0.1.0.0	▾	

**Template Information**

Title \*

Description

Enter Template information and Save. Your workflow will be saved as a template. Confirmation message will be sent.

Template has been Saved. Please Contact Your Network Administrator to Approve. ✕

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.

Advisory

Reset Template Save as Template Select from Template

Workflow created but not started

Workflow can be created from an existing template.

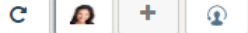
Step	Assigned Role	Assignee	Response	Response Date
1	All Workflow Users	Jane Smith	None	0.1.0.0
2	All Workflow Users	Jane Smith	None	0.1.0.0

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

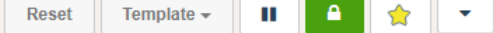
- You can modify the existing template as per your requirements.
- You can save modified template.

Planned Completion:

Save Save and Close Close



Advisory



Title	Description	Category	Created By	Created Time
Modification Plan	Modification Plan Template	Enterprise Change Request	<a href="#">Jane Smith</a>	2022/09/20
GL 50839 2		Agenda and Minutes - Services	<a href="#">Karen White</a>	2022/08/29
10 aug		Document	<a href="#">Anjali Chauhan</a>	2022/08/12
Admin test				2022/08/10
Admin test				2022/08/10
Jaideep Test	Jaideep Test			2016/12/08
QAF Workflow Template		Quality Assurance Form	<a href="#">Arti Palta</a>	2016/09/21
Dec 7 2015		Document	<a href="#">Rajesh Sharma</a>	2015/12/07
UXD approval process - Updated	India Office		<a href="#">Rajesh Sharma</a>	2015/10/29
UXD approval process - Updated	IND		<a href="#">Rajesh Sharma</a>	2015/08/14

All available Templates will be listed in the Workflow window.

After selecting the template, the system will insert the Workflow Tasks/Steps for the selected template under the Workflow window for the selected object.

Planned Completion:





With '+' button you can add multiple steps. Only those roles and users will appear under '+' icon, who have category and object level security permissions.

## Creating Workflow Steps

WF Manager will be able to create and assign Workflow Steps to the users or to group of users.

1. Click this button to add workflow steps.

2. From the corresponding pick lists select User, Role and Required Action

By selecting a Role, WF Manager can specify a user who belongs to this specific role.

*Re-ordering Steps*  
You can edit the step numbers to re-order. Re-order will happen automatically.

### Sequential Steps

If Workflow Steps are set to Sequential and the users are assigned to Workflow Steps, only the first Workflow Step assignee will get the Notification, and then it will be propagated to next Workflow Steps assignees.

3. Click Save to save WF steps.

**Add Instruction**

**Reset Workflow steps Icon will reset WF steps to default.**

**You can *Lock/Unlock* object, Add to Favorites from the Workflow window or have access to the *Menu*.**

**To add WF instruction, select *Instructions* from the *More* dropdown menu.**

**Escalation option will be enabled only if you select a *Due Date* value.**

Workflow - Identifier: ECR-0001409



<input type="checkbox"/>	Step	Assigned Role	Assignee	Action Req'd	Menu	Assigned Date	Duration	Due Date
<input type="checkbox"/>	1	All Workflow Users	Jane Smith	Prepare	1		Days	
<input type="checkbox"/>	2	Canada - Project Me	Select	Re	2		ys	
<input type="checkbox"/>	3	All Workflow Users		Escalation			ys	0.1.0.0



Planned Completion:



Workflow - Identifier: ECR-0001409 Version:0.1.0.0 RID:2915496 Change Info: Rev 0

Workflow navigation toolbar with buttons: Refresh, User, Add, Remove, Advisory, Reset, Template, Play, Lock, Star, Settings, and a dropdown arrow.

Workflow Instructions - Identifier: ECR-0001409 Version: 0.1.0.0 RID: 2915496 Change Info: Rev 0

Workflow Instructions header with fields: Assigned To: Jane S, Action Required: Prepare, RID: 2915496, WF File Version: 0.1.0.0

Go to all steps grid the notes for the users in the Workflow.

Click to go back to the Workflow grid.

- 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.

Open Workflow Step Details.



### 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.

Buttons: Clear, Save, Save and Close, Close



Enter Instruction and click Save and Close.

Response Date table with columns: Response Date, and a Close button at the bottom.

Confirmation message will display

5 Instructions have been added

<input type="checkbox"/>	Step	Assigned Role	Assignee	Action Req'd	Menu	Assigned Date	Duration	Due Date	Version	Response	Response Date
<input type="checkbox"/>	1	All Workflow Users	Jane Smith	Instructions-Yes Escalation-No Comments-No Notes-No			<input type="text"/> Days	<input type="text"/>	<a href="#">0.1.0.0</a>	None	
<input type="checkbox"/>	2	Canada - Project Ma	Select				<input type="text"/> Days	<input type="text"/>	<a href="#">0.1.0.0</a>	None	
<input type="checkbox"/>	3	All Workflow Users	Select	Accept			<input type="text"/> Days	<input type="text"/>	<a href="#">0.1.0.0</a>	None	

If any instruction, escalation or comment is set, the *More* button colour will be changed indicating that something is there.

Planned Completion:

Save Save and Close Close

Go to page: 1 Show rows: 50 1-4 of 4

Go back to [Section 10: Workflow](#) or continue.

Workflow - Identifier: ECR-0001409 Version:0.1.0.0 RID:2915496 Change Info: Rev 0

Workflow control bar with buttons: Refresh, User, Add, Profile, Advisory, Reset, Template, Play, Lock, Star, Settings, and a dropdown arrow.

<input type="checkbox"/>	Step	Assigned Role	Assignee	Action Req'd	Menu	Assigned Date	Duration	Due Date	Version	Response	Response Date
<input type="checkbox"/>	1	All Workflow Users	Jane Smith	Prepare	⌵ ...		Days		0.1.0.0	None	
<input type="checkbox"/>	2	Canada - Project M	Select	Release	⌵ ...		Days		0.1.0.0	None	
<input type="checkbox"/>	3	All Workflow Users	Jane Smith	Notify	⌵ ...		Days		0.1.0.0	None	
<input type="checkbox"/>	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:

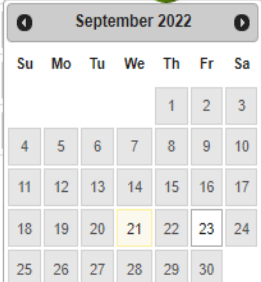
Save Save and Close Close

Advisory

<input type="checkbox"/>	Step	Assigned Role	Assignee	Action Req'd	Menu	Assigned Date	Duration	Due Date	Version	Response	Response
<input type="checkbox"/>	1	All Workflow Users	Jane Smith	Prepare	→		Days →	2022/09/23	1.0	None	
<input type="checkbox"/>	2	Canada - Project Manager	Select	Release	⌵					None	
<input type="checkbox"/>	3	All Workflow Users		Escalation	⌵					None	
<input type="checkbox"/>	3	All Workflow Users		Comments	⌵					None	
<input type="checkbox"/>	3	All Workflow Users		Notes	⌵					None	

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:

Workflow - Identifier: ECR-0001409 Version:0.1.0.0 RID:2915496 Change Info: Rev 0

Navigation icons: Refresh, Profile, Add, Help

Advisory

Buttons: Reset, Template, Lock, Star, Settings, Dropdown

Table headers: Step, Assigned Role, Assignee, Action Req'd, Menu, Assigned Date, Duration, Due Date, Version, Response, Respons

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:  Remove

User:

Select Role/User when past due, escalate to.

Click Save and Close to save escalation assignment and go back to the all-steps grid.

Buttons: Save, Save and Close, Close

Planned Completion:

Buttons: Save, Save and Close, Close

Escalation is assigned successfully. x

Confirmation message will display.

Step	Assigned Role	Assignee	Action	Menu	Assigned Date	Duration	Due Date	Version	Response
1	All Workflow Users	Jane Smith	Pr	Escalation-Yes Comments-No Notes-No		Days	2022/09/23	0.1.0.0	None
2	Canada - Project Manager	Select	Release					0.1.0.0	None
3	All Workflow Users	Jane Smith	Notify					0.1.0.0	None
3	All Workflow Users	Aileen Kwok	Notify					0.1.0.0	None

Escalation for this step has been updated from NO to YES.

Planned Completion:

Save Save and Close Close



### Duration

Advisory

Reset

Template



<input type="checkbox"/>	Step	Assigned Role	Assignee	Action Req'd	Menu	Assigned Date	Duration	Due Date	Version	Response	Response
<input type="checkbox"/>	1	All Workflow Users	Jane Smith	Prepare	...	[ ] Days	2	[ ]	[ ]	None	
<input type="checkbox"/>	2	Canada - Project Manager	Select	Release	...						
<input type="checkbox"/>	3	All Workflow Users	Jane Smith	Notify	...						
<input type="checkbox"/>	3	All Workflow Users	Aileen Kwok	Notify	...						

If you specify the *Duration* value, then the *Due Date* becomes a read-only field.  
If you clear the *Duration* value, then the *Due Date* becomes editable.  
The *Due Date* will be calculated based on the Duration when Workflow Step becomes current.

Planned Completion:

Save

Save and Close

Close

Workflow - Identifier: ECR-0001409 Version:0.1.0.0 RID:2915496 Change Info: Rev 0

Buttons: Refresh, Profile, Add, Lock, Advisory, Reset, Template, Start workflow, Lock, Star, Settings, Dropdown

<input type="checkbox"/>	Step	Assigned Role	Assignee	Action Req'd	Menu	Assigned Date	Duration	Due Date	Version	Response	Response
<input type="checkbox"/>	1	All Workflow Users	Jane Smith	Prepare	...		2 Days		0.1.0.0	None	
<input type="checkbox"/>	2	Canada - Project Manager	Select	Release	...						
<input type="checkbox"/>	3	All Workflow Users	Jane Smith	Notify	...						
<input type="checkbox"/>	3	All Workflow Users	Aileen Kwok	Notify	...						

1

Start workflow

**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:

Buttons: Save, Save and Close, Close

**2** Your workflow has been started ✕

Reset Template ⌵ ⏸ 🔒 ☆ ⚙️ ⌵

<input type="checkbox"/>	Step	Assigned Role	Assignee	Action Req'd	Menu	Assigned Date	Duration	Due Date	Version	Response	Respons
<input type="checkbox"/>	1	All Workflow Users	Jane Smith	Prepare	⌵ ⋮	2022/09/22	2 Days	2022/09/24	⌵ ⌵ ← .0	None	
<input type="checkbox"/>	2	Canada - Project Manager	Select	Release	⌵ ⋮		Days				
<input type="checkbox"/>	3	All Workflow Users	Jane Smith	Notify	⌵ ⋮		Days				
<input type="checkbox"/>	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.

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

Type	Lock	Menu	Record Id...	Primary Identifier	Title	Version	Lifecycle State	Category	Created By	Modified By	Sync
			g		0.1.0.0	In Work	Enterprise Change Request	2022/09/21	Jane Smith	Jane Smith	
			g		0.2.0.0	In Work	Enterprise Change Request	2022/09/21	Jane Smith	Jane Smith	
			e		0.1.0.0	In Work	Agenda	2022/09/21	Jane Smith	Jane Smith	
			e		0.1.0.0	In Work	Agenda	2022/09/21	Jane Smith	Jane Smith	

- Discussion
- Files
- Rename
- Security
- Related
- Tree
- Upload
- Vers Hist
- Vers Up
- Where
- Workflow**

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	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

Workflow Status changed to Advisory. Confirmation sent.

Your workflow has been paused

Start workflow

- The *Pause Workflow* button will change to *Start Workflow* and other workflow buttons will be activated.
- Whenever needed, a paused Workflow can be restarted.

2

When a workflow is paused and then started again, an email notification will be sent to all assigned users.

Planned Completion:

Save Save and Close Close

## Bulk Edit workflow steps

Workflow - Identifier: ECR-0001409 Version:0.1.0.0 RID:2915496 Change Info: Rev 0

Workflow paused

2 Items selected.

Advisory

Reset Template

More

- Bulk Edit
- Copy
- Delete

Step	Assigned Role	Action Req'd	Menu	Assigned Date	Duration	Due Date	Version	Response	Response
<input checked="" type="checkbox"/>	1	All Workflow Users	Prepare		2 Days		<a href="#">0.1.0.0</a>	None	
<input checked="" type="checkbox"/>	2	Canada - Project Manager	Release		Days		<a href="#">0.1.0.0</a>	None	
<input checked="" type="checkbox"/>	3	All Workflow Users	Notify		Days		<a href="#">0.1.0.0</a>	None	
<input type="checkbox"/>			Notify		Days		<a href="#">0.1.0.0</a>	None	

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.

Planned Completion:

Save Save and Close Close



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 :**

**User :**

**Action :**

**Duration :**  Days

**Due Date :**

**Escalation :**

**File Version :** [0.1.0.0](#)

**Instruction :**

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. Select *Save and Close* to apply the changes across all steps and go back to all steps grid.



Save Save and Close Close





Refresh, Profile, Add, Search icons

Changes applied successfully

Reset, Template, Play, Lock, Star, Settings, Dropdown icons

<input type="checkbox"/>	Step	Assigned Role	Assignee	Action Req'd	Menu	Assigned Date	Duration	Due Date	Version	Response	Response
<input type="checkbox"/>	1	All Workflow Users	Jane Smith	Review	⌵ ...		3 Days		0.1.0.0	None	
<input type="checkbox"/>	2	Canada - Project Manager	Select	Review	⌵ ...		3 Days		0.1.0.0	None	
<input type="checkbox"/>	3	All Workflow Users	Jane Smith	Notif	⌵ ...		Days		0.1.0.0	None	
<input type="checkbox"/>	3	All Workflow Users	Aileen Kwok	Notify	⌵ ...		Days		0.1.0.0	None	

Changes applied successfully to the selected steps.

Planned Completion:

Save Save and Close Close buttons

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

WF Manager : Jane Smith

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 Days		
3	All Workflow Users	Jane Smith						
3	All Workflow Users	Aileen Ky						

### 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.

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

### Notification Settings

When I am the Workflow Manager:

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

Save

Close

Planned Completion:

Save

Save and Close

Close



My Settings

My Profile

Install Sync

Logout

Manage Devices

Notification Settings



Default Settings

My Workflow Templates

Connect Email to Tina

My Grid Layouts



When I am the Workflow Manager:

 Receive notifications when I respond to workflows steps. Receive notifications when workflow steps are completed with positive responses. Receive notifications when the workflow is started or I am the assignee in the current workflow step.

**Notification Settings for the Workflow Manager.**  
You will also see them under **My Settings > Notification Settings.**

Get Notification For				gh Mobile	Through Sync
Network & Security				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
WorkFlow				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Document Management	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
VersionUp	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Job	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
AutoCAD	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Go to page: Show rows: 

1-6 of 6



Save

Cancel

## 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

<input type="checkbox"/>	Step	Assigned Role	Assignee	Action Req'd	Menu	Assigned Date	Duration	Due Date	Version
<input type="checkbox"/>	1	All Workflow Users ▾	Jane Smith	Review ▾	⌵ ...	2022/09/22	3 Days	2022/09/25	0.1.0.0
<input type="checkbox"/>	2	Canada - Project Manager ▾	Select	Review ▾	⌵ ...				
<input type="checkbox"/>	3	All Workflow Users ▾	Jane Smith	Notify ▾	⌵ ...				
<input type="checkbox"/>	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 to page:

1

Show rows:

50

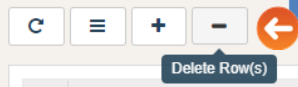
1-4 of 4

The Add Row (+) button will add a new Row and it will be editable.



Default Network Workflow Notification Settings: Default Network Workflow Notification Settings will be disabled in the Workflow Notifications window except for Is Active column. The workflow manager can inactivate default network workflow notifications but not edit or delete them.

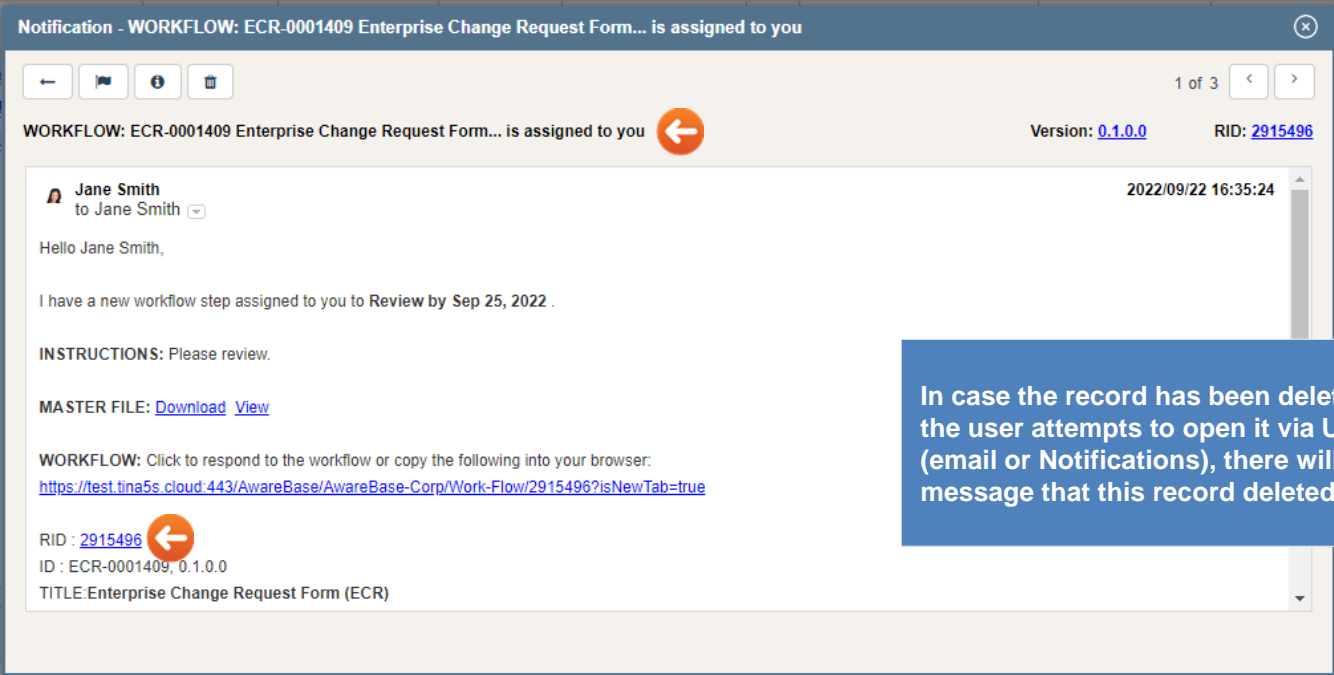
By selecting the newly created row, the Delete Row (-) button will appear.



Select Save and Close to apply the changes across all steps and go back to all steps grid. Confirmation will be sent.

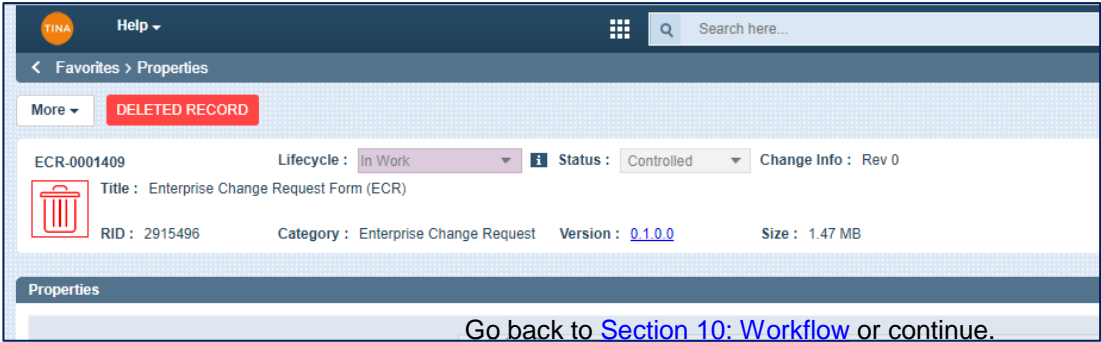


When	Notify To	Notify CC	Template	Source	Is Active
On Overdue	Current Workflow Manager	Current Workflow Manager	WFL inactive user email	Record	<input checked="" type="checkbox"/>
Upon Workflow step becomin...	Current Workflow Step Assignee,		MVRD Workflow Start Email	Network	<input checked="" type="checkbox"/>
On Overdue	Current Workflow Step Assignee,	Current Workflow Manager,	MVRD Workflow Overdue Email	Network	<input checked="" type="checkbox"/>
Reassign Workflow	Current Workflow		MVRD Workflow Step Assignee Email	Network	<input checked="" type="checkbox"/>
On Escalation	Escalated Assignee		MVRD Workflow Escalation Email	Network	<input checked="" type="checkbox"/>
Manual Pause	Current Workflow		MVRD Workflow Manual Pause Email	Network	<input checked="" type="checkbox"/>
On Inactive User/Role Pause	Current Workflow		MVRD Workflow Inactive User/Role Pause Email	Network	<input checked="" type="checkbox"/>
On Change of Workflow Man...	New Workflow Manager		MVRD Workflow Change of Workflow Manager Email	Network	<input checked="" type="checkbox"/>
On Workflow Step Response ...	Current Workflow		MVRD Workflow Step Response Email	Network	<input checked="" type="checkbox"/>
On Workflow Step Response ...	Current Workflow		MVRD Workflow Step Response Email	Network	<input checked="" type="checkbox"/>
On Workflow Step Response ...	Current Workflow Manager,		MVRD Workflow Step Response Email	Network	<input checked="" type="checkbox"/>
On Workflow Complete	Current Workflow Manager,		MVRD Workflow Completed Email	Network	<input checked="" type="checkbox"/>
On Negative Response	Current Workflow Manager,		Workflow pause email after negative r...	Network	<input checked="" type="checkbox"/>
On Workflow Step Response ...	Current Workflow Manager,		Notify Assignee of Completed Step by...	Network	<input checked="" type="checkbox"/>
On Workflow Step Response ...	Current Workflow Manager,		MVRD Workflow Completed Email	Network	<input checked="" type="checkbox"/>
On Workflow Step Response ...	Current Workflow Manager,		MVRD Workflow Completed Email	Record	<input checked="" type="checkbox"/>



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.



Manage Devices

Notification Settings

My Default Settings

My Workflow Templates

## My Workflow Templates

Grid Layout: Select Layout

My Settings

My Profile

Install Sync

Logout

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	<input type="checkbox"/>	



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.

Go to page:

1

Show rows:

10

1-1 of 1





Workflow

## Edit Workflow Template

Refresh, User, Add, Help icons

Advisory

Reset

Template ▾



<input type="checkbox"/>	Step	Assigned Role	Assignee	Action Req'd	Menu	Assigned Date	Duration	Due Date	Version	Response	Response
<input type="checkbox"/>	1	All Workflow Users ▾	Jane Smith ▾	Prepare ▾	▾ ...		2 Days ×		0.1.0.0	None ▾	
<input type="checkbox"/>	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



### Delete Workflow Template

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

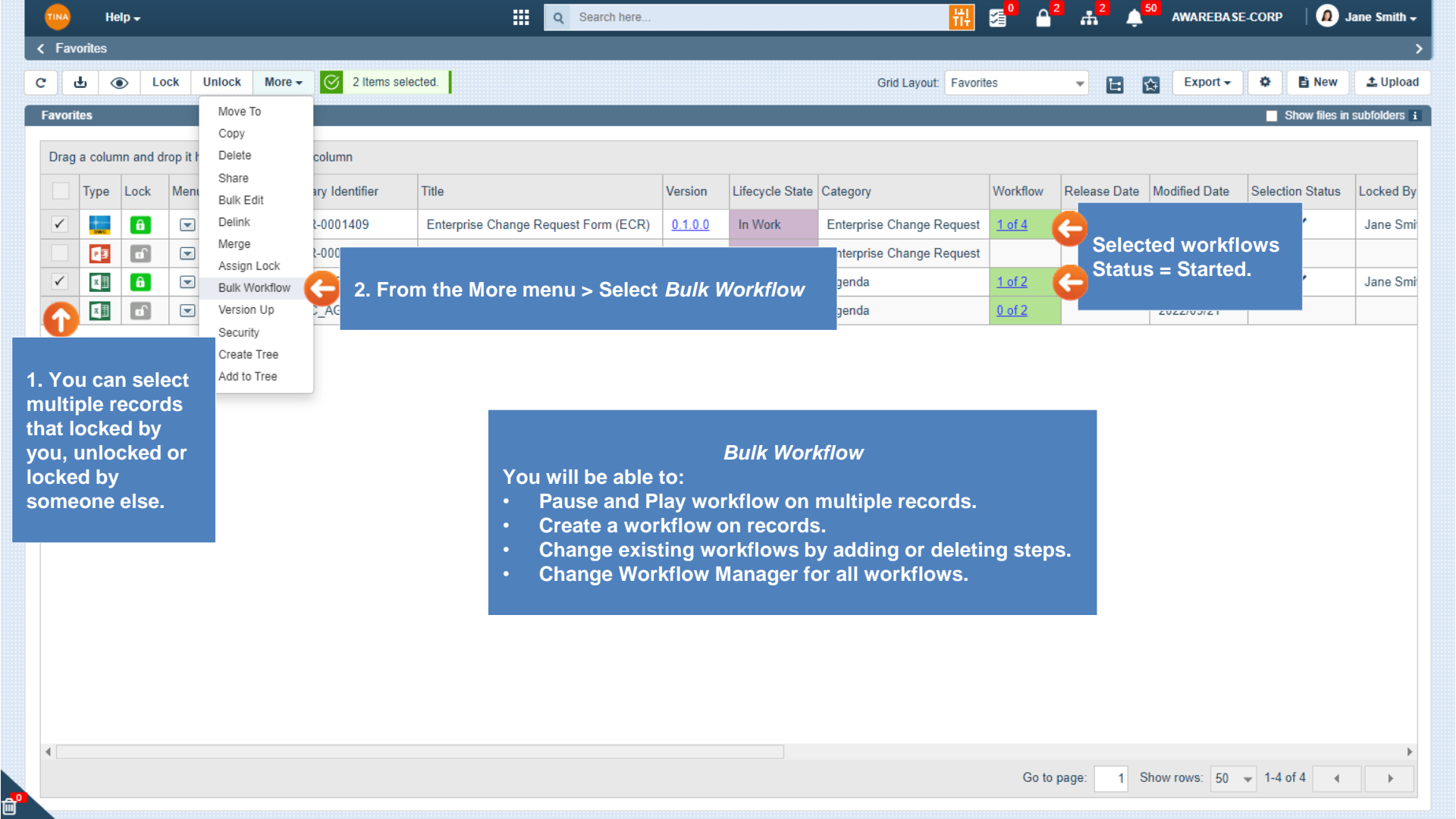
Title	Description	Created Date	Edit	Remove	Category	Is Shared
Modification Plan	Modification Plan Template	2022/09/20			Enterprise Change Request	<input type="checkbox"/>

*My Settings page > My Workflow Templates tab by clicking the X icon, the Delete window with the Delete and Cancel options will appear. Click any to proceed. Confirmation message will display.*

**Delete**

Are you sure?

**Delete** **Cancel**



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.

**Bulk Workflow > Change Workflow Manager on existing workflows**

**1. Click *Change workflow manager*.**

**Change Workflow Manager**

**Make Me** ←

→ Enter User

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

Delete Steps Not Completed
 Your changes are being processed via Job 66853. Check on progress in the Job Status section. X
Template ▾
Upon Job Completion
Take No Action ▾

The *Workflow Manager* will be changed for all the records once the job is processed.

User	Action Req'd	Due Date	Perform <span style="font-size: small;">i</span>
			Take No Action Start Workflows Pause Workflows

**Upon Job Completion (select an Action):**

1. If you want the current state (Start, Pause) of the selected workflows to be left as-is, then leave the selection as *Take No Action*.
2. If you want all the selected workflows to start once the bulk workflow changes are implemented, then choose *Start Workflows*.
3. If you want all the selected workflows to pause once the bulk workflow changes are implemented, then select *Pause Workflows*.

The *Create Job* button is activated. Select the Action that you would like to proceed upon job creation. Confirmation message will display.

## Bulk Workflow > Pause Workflow on existing workflows

Your workflow will pause once job is processed



Reset

Template

Upon Job Completion

Pause Workflows



Take No Action

Start Workflows

Pause Workflows

1. Select the *Pause Workflows* Action. Confirmation message will display that workflow will pause once job is processed.



Type	Lock	Menu	Record Id...	Primary Identifier	Title	Version	Lifecycle State	Category	Workflow
<input checked="" type="checkbox"/>			<a href="#">2915496</a>	ECR-0001409	Enterprise Change Request Form (ECR)	<a href="#">0.1.0.0</a>	In Work	Enterprise Change Request	<a href="#">1 of 4</a>
<input type="checkbox"/>			<a href="#">2915497</a>	ECR-0001409	Enterprise Change Request Form (ECR)	<a href="#">0.2.0.0</a>	In Work	Enterprise Change Request	
<input checked="" type="checkbox"/>			<a href="#">2915494</a>	DOC_AGD-0010161	Report_Functional - COPY	<a href="#">0.1.0.0</a>	In Work	Agenda	<a href="#">1 of 2</a>
<input type="checkbox"/>			<a href="#">2915492</a>	DOC_AGD-0010160	Report_Functional	<a href="#">0.1.0.0</a>	In Work	Agenda	<a href="#">0 of 2</a>



3. Selected workflows Paused now.



2. Click *Create Job*. Confirmation message will display. The workflows will be Paused for all the records once the job is processed.



The *Create Job* button is activated.

Create Job Close

## Bulk Workflow > Delete Steps Not Completed on existing workflows

### Bulk Workflow

Delete Steps Not Completed

Your changes are being processed via Job 66877. Check on progress in the Job Status section.

Delete all unactioned steps

1. Checkmark the *Delete Steps Not Completed* box - all Pending steps will be deleted for all the records once the job is processed.

2. Upon Job Completion - select an Action.

Search here...

2 Items selected.

Grid Layout: Favorites

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

<input type="checkbox"/>	Type	Lock	Menu	Record Id...	Primary Identifier	Title	Version	Lifecycle State	Category	Workflow
<input checked="" type="checkbox"/>				<a href="#">2915496</a>	ECR-0001409	Enterprise Change Request Form (ECR)	<a href="#">0.1.0.0</a>	In Work	Enterprise Change Request	<a href="#">1 of 1</a>
<input type="checkbox"/>				<a href="#">2915497</a>	ECR-0001409	Enterprise Change Request Form (ECR)	<a href="#">0.2.0.0</a>	In Work	Enterprise Change Request	
<input checked="" type="checkbox"/>				<a href="#">2915494</a>	DOC_AGD-0010161	Report_Functional - COPY	<a href="#">0.1.0.0</a>	In Work	Agenda	<a href="#">1 of 1</a>
<input type="checkbox"/>				<a href="#">2915492</a>	DOC_AGD-0010160	Report_Functional	<a href="#">0.1.0.0</a>	In Work	Agenda	<a href="#">0 of 2</a>

4. All Pending steps deleted. Workflow Status changed to Completed.

3. Click *Create Job*. Confirmation message will display. The workflows will be updated for all the records once the job is processed.

The *Create Job* button is activated.

Create Job Close

*Bulk Workflow > Add the workflow steps*

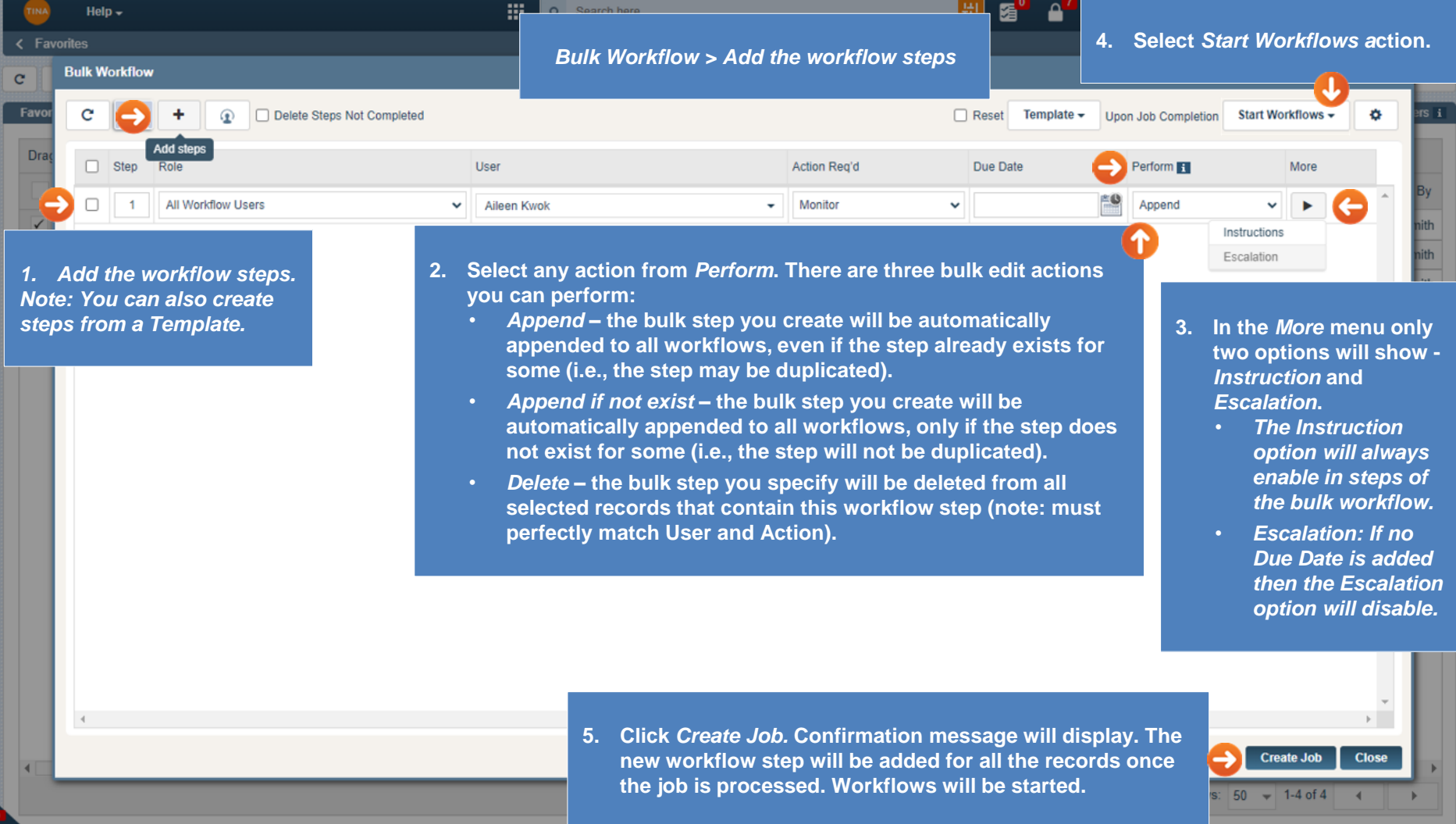
4. Select *Start Workflows* action.

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.



Favorites Show files in subfolders

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

<input type="checkbox"/>	Type	Lock	Menu	Record Id...	Primary Identifier	Title	Version	Lifecycle State	Category	Workflow	Release
<input checked="" type="checkbox"/>				<a href="#">2915496</a>	ECR-0001409	Enterprise Change Request Form (ECR)	<a href="#">0.1.0.0</a>	In Work	Enterprise Change Request	<a href="#">1 of 2</a>	
<input type="checkbox"/>				<a href="#">2915497</a>	ECR-0001409	Enterprise Change Request Form (ECR)	<a href="#">0.2.0.0</a>	In Work	Enterprise Change Request		
<input checked="" type="checkbox"/>				<a href="#">2915494</a>	DOC_AGD-0010161	Report_Functional - COPY	<a href="#">0.1.0.0</a>	In Work	Agenda	<a href="#">1 of 2</a>	
<input type="checkbox"/>				<a href="#">2915492</a>	DOC_AGD-0010160	Report_Functional	<a href="#">0.1.0.0</a>	In Work	Agenda	<a href="#">0 of 2</a>	

← The new workflow step is added for all the records Selected.  
 ← Workflows Started now.

**Workflow - Identifier: ECR-0001409    Version: 0.1.0.0    RID: 2915496    Change Info: Rev 0**

➔ On Track
Reset
Template ▾
⏸



▾

<input type="checkbox"/>	Step	Assigned Role	Assignee	Action Req'd	Menu	Assigned Date	Duration	Due Date	Version	Response	Response Date
<input type="checkbox"/>	1	All Workflow Users ▾	Jane Smith	Prepare ▾	...	2022/09/23	<input type="text"/> Days	<input type="text"/>	<a href="#">0.1.0.0</a>	Prepared ▾	2022/09/23
<input type="checkbox"/>	2	All Workflow Users ▾	Aileen Kwok	Monitor ▾	...	2022/09/23	<input type="text"/> Days	<input type="text"/>	<a href="#">0.1.0.0</a>	None ▾	

➔



Your changes are being processed via Job 66883. Check on progress in the Job Status section.

Refresh Add User Delete Steps Not Completed

Reset

<input type="checkbox"/>	Step	Role	User	Action Req'd	Due Date
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					

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

TINA Help Search here... AWAREBASE-CORP Jane Smith

Workflow - Identifier: ECR-0001409 Version:0.1.0.0 RID:2915496 Change Info: Rev 0

Workflow paused

Step	Assigned Role	Assignee	Action Req'd	Menu	Assigned Date	Duration	Due Date	Version	Response	Response Date
1	All Workflow Users	Jane Smith	Prepare		2022/09/23	Days		0.1.0.0	Prepared	2022/09/23
2	All Workflow Users	Aileen Kwok	Monitor			Days	2022/09/24	0.1.0.0	None	

Before Reset

Go back to [Section 10: Workflow](#) or continue.

TINA Help Search here... AWAREBASE-CORP Jane Smith

Workflow - Identifier: ECR-0001409 Version:0.1.0.0 RID:2915496 Change Info: Rev 0

Step	Assigned Role	Assignee	Action Req'd	Menu	Assigned Date	Duration	Due Date	Version	Response	Response Date
1	All Workflow Users	Jane Smith	Prepare		2022/09/23	Days		0.1.0.0	Prepared	2022/09/23
2	All Workflow Users	Select	Accept			Days		0.1.0.0	None	

After Reset

Go back to [Section 10: Workflow](#) or continue.

# 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

<input type="checkbox"/>	Job Id	Action	Rids	Job Status	Job Submitted	Job Completed	Notes
<input type="checkbox"/>	66883	Workflow	2	<a href="#">(2/2)-Completed</a>	2022/09/23	2022/09/23	Rese
<input type="checkbox"/>	66882	Workflow	2	<a href="#">(2/2)-Completed</a>	2022/09/23	2022/09/23	Add workflow steps
<input type="checkbox"/>	66881	Workflow	2	<a href="#">(2/2)-Completed</a>	2022/09/23	2022/09/23	Type Your Notes Here
<input type="checkbox"/>	66879	Workflow	2	<a href="#">(2/2)-Completed</a>	2022/09/23	2022/09/23	Type Your Notes Here
<input type="checkbox"/>	66878	Workflow	2	<a href="#">(2/2)-Completed</a>	2022/09/23	2022/09/23	Type Your Notes Here
<input type="checkbox"/>	66877	Workflow	2	<a href="#">(2/2)-Completed</a>	2022/09/23	2022/09/23	Delete Steps Not Completed on existing workflows
<input type="checkbox"/>	66876	Workflow	2	<a href="#">(2/2)-Completed</a>	2022/09/23	2022/09/23	Type Your Notes Here
<input type="checkbox"/>	66875	Workflow	2	<a href="#">(2/2)-Completed</a>	2022/09/23	2022/09/23	Pause WFL
<input type="checkbox"/>	66874	Workflow	2	<a href="#">(2/2)-Completed</a>	2022/09/23	2022/09/23	Change WFL Manager
<input type="checkbox"/>	66873	Workflow	2	<a href="#">(2/2)-Completed</a>	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 back to [Section 10: Workflow.](#)