Section 9

Workflow Response

Step Details window will open.

Workflow Response:

In case to respond, you have to select proper Response option from the dropdown list.

Comments

You will be able to add response and provide any Comments for each Workflow Step assigned to you in the Workflow.

MarkUp

The upload file MarkUp icon will be enabled for the assignee, who can response to the workflow step. For other users, this icon is disabled. Note: Assignee can Delete attached file until the workflow step hasn't responded.

Click *Save Step* to commit your changes and proceed with the Workflow to the next step.
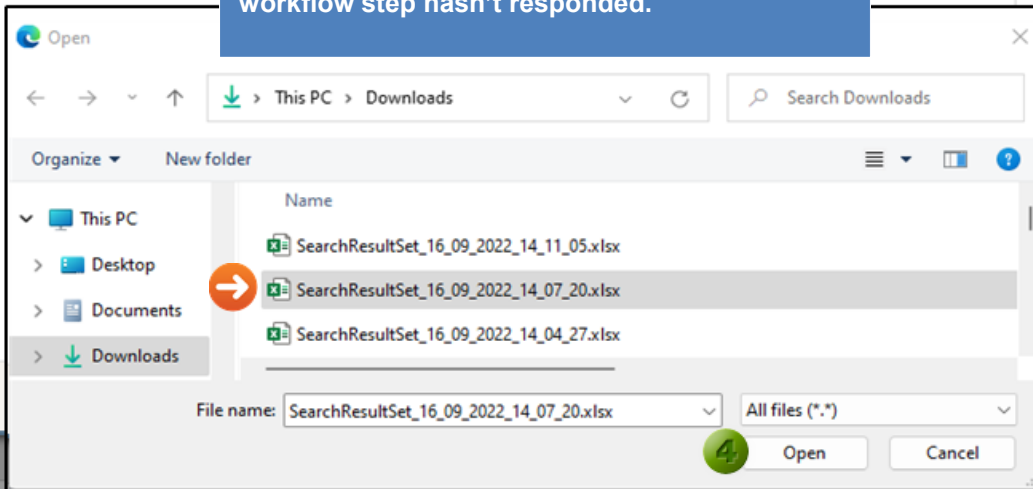
Confirmation message will display.

Workflow Details - Identifier: AREP-0000005   Version: 0.1.0.0   RID: 2924275

Your workflow step has been saved ✕

Go to all steps grid.

WF Manager: Jane S   Step: 1   Assigned To: Jane S   Action Required: Prepare   RID: 2924275   WF File Version: 0.1.0.0

Assigned To :   All Workflow User ▾   Jane Smith

Response :   Prepared ▾

Action Required :   Prepare ▾

Comments :   Enter Comments here.

Due Date :

Duration :   Days

MarkUp :   0.1.0.1

Workflow File linked as a Sub-File of version on which Workflow step is Responded.

Escalation Set :   No   •••

Notes :   Enter Step Notes here.

Instructions :   Provide Instructions here.

Response Date has been inserted by Saving the Step.

Response By :   Jane S

Close the workflow Step Details window. The Workflow window with all the steps in the workflow will automatically open.

Response Date :   2022/09/19

Save   Save and Close   Close

Go to page: 1   Show rows: 20   1-6 of 6

Go back to Section 9: Workflow Response or continue.

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

Files > Workflow MarkUp File

Favorites   Show files in subfolders ⓘ

Export ▾   New   Upload

Drag a column and

Type   Lock   Me

Files- Identifier: AREP-0000005   Version: 0.1.0.0   RID: 2924275   Change Info: Rev

Version Notes   More ▾

File Version **0.1.0.0**   Jane S 2022/09/15 Mountain Daylight Time◻ Size : 3.54 KB

1.   File Version **0.1.0.1**   Jane S 2022/09/19 Mountain Daylight Time◻ Size : 3.94 KB

Set as Viewable
Add Notes
Go to workflow step

Workflow File linked as a Sub-File of version on which Workflow step is Responded.

From the Files window, you can select *Go to workflow step* option for the attached Workflow file version.

You can Delete any file version by selecting X.

Delete Workflow MarkUp File

If you lock the record and have security permission, you can delete the Workflow MarkUp file version from the *Files* section after Save and without saving the workflow step response.

☐ Show deleted versions

Go to page: 1   Show rows: 20 ▾   1-6 of 6   ◀   ▶

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

Grid Layout: Favorites   Export ▾   New   Upload

Favorites   ☐ Show files in subfolders ⓘ

Drag a column and drop

| Type | Lock | Me | re Used |

Files- Identifier: AREP-0000005   Version: 0.1.0.0   RID: 2924275   Change Info: Rev

Version Notes   More ▾

File Version   **0.1.0.0**   Jane S   2022/09/15 Mountain Daylight Time▫ Size : 3.54 KB

1.   File Version   **0.1.0.1**   Jane S   2022/09/19 Mountain Daylight Time▫ Size : 3.94 KB

Delete   ✕

Are you sure, you want to delete the file version 0.1.0.1?

② [Ok] [Cancel]

Click Ok to proceed or Cancel to go back to the *Files* window.

☐ Show deleted versions   Close

Go to page: 1   Show rows: 20   1-6 of 6   ◀   ▶

Search here...

0   17   2   10   AWAREBASE-CORP ▾   Jane Smith ▾

Favorites

Workflow *MarkUp* file has been deleted.

Export ▾   ⚙   New   ⬆ Upload

Favorites   ☐ Show files in subfolders i

Drag a column and drop

Type	Lock	Me

Files- Identifier: AREP-0000005   Version: 0.1.0.0   RID: 2924275   Change Info: Rev   ⬚ ✕

↻   ⬆   🔗   📂   Version Notes   More ▾   🔒 ⭐ ▾

| 📗 | File Version **0.1.0.0** | **Jane S** 2022/09/15 Mountain Daylight Time▫ Size : 3.54 KB | 🌐 ▾ ✖ |

1. 🗑 File Version **0.1.0.1**   **Jane S** 2022/09/19 Mountain Daylight Time▫ Size : 3.94 KB

- For the Deleted files, red Trash icon is showing.

- The context menu is not available for deleted file versions.

☑ Show deleted versions

Close

To see deleted file versions, check the "Show deleted versions" box.

Go to page: 1   Show rows: 20 ▾   1-6 of 6   ◄   ►

0

Workflow Details - Identifier: AREP-0000005   **Version: 0.1.0.0**   **RID: 2924275**   **Change Info: Rev**

Go to all steps grid.

WF Manager: _Jane S_   Step: 1   Assigned To: _Jane S_   Action Required: Prepare   RID: _2924275_   WF File Version: _0.1.0.0_

Assigned To :   All Workflow User ▾   Jane Smith

Action Required :   Prepare ▾

Due Date :

Duration :   Days

Escalation Set :   No ···

Instructions :   Provide Instructions here.

Response :   Prepared ▾

Comments :   Enter Comments here.

MarkUp :   ⬆   _0.1.0.1_(Deleted)

On the _Workflow Step Details_, the _MarkUp_ file marked as deleted.

Notes :   Enter Step Notes here.

Response By :   _Jane S_

Response Date :   2022/09/19

Close the workflow _Step Details_ window. The _Workflow_ window with all the steps in the workflow will automatically open.

Save   Save and Close   Close

Go back to [Section 9: Workflow Response](#) or continue.

Notes and Comments can be edited by assignee, escalation user and WF manager at any time regardless of workflow status (no lock required).

Workflow - Identifier: AREP-0000005   Version:0.1.0.0   RID

On Track

	Step	Assigned Role	Assignee	Action Req'd	Menu	Assigned Date	Duration	Due Date	Version	Response	Response Date
	1	All Workflow Users	Jane Smith	Prepare	▶ ...	2022/09/19	Days		0.1.0.0	Prepared	2022/09/19
	2	Drafting	Select	Release	▶ ...	2022/09/19	Days		0.1.0.0	None	
	3	Workflow Users	Steven Gentles		...		Days		0.1.0.0	None	

Step Details
Instructions
Escalation
Comments
Notes

If a Workflow step is assigned to a Role, but no user is specified, all users in that role will see their Workflow and could be able to respond.

Click this icon or select *Step Details* from the *Menu* options.

Click the *Close* button – My Workflow > *Workflowed To Me* window will automatically open.

Planned Completion:

Close

Go back to Section 9: Workflow Response or continue.

Go to page: 1   Show rows: 20   1-6 of 6

Bulk Respond to Workflows
From My Workflow window you can respond to one or multiple items without having to open the Workflow window itself.

You can Bulk respond to workflows that have common *Action Required*

By selecting the workflow items, the *Respond* button will be activated.

By clicking the *Respond* button, the *Bulk Workflow – Response* window will open.

Select *Response*, enter your *Comments* and click *Create Job*.

By performing any bulk action (Edit, Lock or Workflow), job number will be created, and notification sent.

Click *Refresh* to update *My Workflow* window.

Help ▾

My Workflow

Favorites

Your changes are being processed via Job 66668. Check on progress in the Job Status section. ✕

Export ▾ ⚙

		Record ID	Version	Internal ID	Title	Action Required	Due by	Health Status	Menu	Health Notes	Revision
☐	Respond	2924275	0.1.0.0	AREP-0000005	WhereUsedResultSet	Release		On Track	▾	Workflow is progressing on schedule	Rev
☐	Respond	2924259	0.1.0.0	AREP-0000002	Aero Report	check	2022/09/16	Advisory	▾	Step 2: Overdue	Rev

Workflowed To Me (02) Workflows I Manage (03)

Show: All Current ▾

Job Status Report

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

Favorites

Job Status

Export ▾ ⚙

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

	Job Id	Action	Rids	Job Status	Job Submitted	Job Completed	Notes
☐	66668	Workflow Response	2	(2/2)-Completed	2022/09/20	2022/09/20	Type Your Notes Here