

Section 8

My Workflow Tabs

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Favorites



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	Release Date	Modified Date	Selection Status	Locked By
<input type="checkbox"/>				2915591	DOC_AGD-0010162	Bi-Weekly Mod Meeting Agenda - 13 Octob	0.1.0.0	In Work	Agenda	0 of 3		2022/09/26		Jane Smi
<input type="checkbox"/>				2915496	ECR-0001409	Enterprise Change Request Form (ECR)	0.1.0.0	In Work	Enterprise Change Request	1 of 2		2022/09/21		Jane Smi
<input type="checkbox"/>				2915497	ECR-0001409	Enterprise Change Request Form (ECR)	0.2.0.0	In Work	Enterprise Change Request	1 of 3		2022/09/21		
<input type="checkbox"/>				2915494	DOC_AGD-0010161	Report_Functional - COPY	0.1.0.0	In Work	Agenda	1 of 3		2022/09/21		Jane Smi
<input type="checkbox"/>				2915492	DOC_AGD-0010160	Report_Functional	0.1.0.0	In Work	Agenda	2 of 3		2022/09/21		

On the Navigation bar, the Workflow icon will show the number of workflows assigned to you. Click *My Workflow* to review workflows.



My Workflow window (Workflowed To Me tab) will open.

1. If you wish to modify the window layout, use the *Select Columns* button from the *Settings* menu.

Workflowed To Me (02)

Show: All Current

	Menu	Lock	Record Id...	Health Status	Health Notes	Action Required	Respo	Lifecycle State
<input type="checkbox"/>	Respond		2915497	Warning	Step 1: Negative response	Accept	None	In Work
<input type="checkbox"/>	Respond		2915496	On Track	Workflow is progressing on schedule	Monitor	None	In Work

The *Select Columns and Apply Layout* window will open.

2. **Select/Unselect columns.**
To customize My Workflow, you may:

Add columns (grab any *Available Column* and move it to the *Columns Selected*).

Remove columns (click X to remove).

3. **Click Apply.**

Workflows I Manage (05)

Show: Past From: 2022/08/27 To: 2022/09/26

Select Columns and Apply Layout

Available Columns

- Picklist 2
- Release Date
- Scheduled Release Date
- State
- Test CF
- Test Listbox
- Unique
- User CF
- Workflow Manager

Grab and move to Columns Selected

Grid Type Workflow To Me

Columns Selected

- Lock
- Record Identifier
- Health Status
- Health Notes
- Action Required
- Response
- Assignee
- Responded By
- Due by

Grab and move to reorder 'X' to remove

Apply Cancel

Lifecycle State	Version
In Work	0.1.0
In Work	0.1.0
In Work	0.1.0
	0.2.0

Go to page: 1 Show rows: 50 1-5 of 5

Save Grid Layout

To be this a permanent change, you must Save Layout on My Workflow page. You will be able to Update the Existing Layout or Create a new one.

My Workflow

Workflowed To Me (02) Workflows I Manage

Show: Past From: 2022/08/27

Menu	Lock	Record Id...	Health						Identifier	Lifecycle State	Version
View Details	🔒	2915492	On Track	Workflow is progressing on schedule	Accept	Accepted	Jane S	Jane S	DOC_AGD-0010160	In Work	0.1.0
View Details	🔒	2915492	On Track	Workflow is progressing on schedule	Accept	Accepted	Jane S	Jane S	DOC_AGD-0010160	In Work	0.1.0
View Details	🔒	2915494	Advisory	Workflow is progressing on schedule	Accept	Accepted	Jane S	Jane S	DOC_AGD-0010161	In Work	0.1.0
View Details	🔒	2915496	On Track	Workflow is progressing on schedule	Accept	Accepted	Jane S	Jane S	ECR-0001409	In Work	0.1.0
View Details	🔒	2915497	Warning	Step 1: Network Saved Layout (NSL)	Accept	Accepted	Jane S	Jane S	ECR-0001409	In Work	0.2.0
View Details	🔒	2915593	On Track	Workflow is progressing on schedule	Accept	Accepted	Jane S	Jane S	DOC_AGD-0010163	In Work	0.1.1

Save Grid Layout Saved Grid Layout successfully

Update Existing Layout Create New Layout

Layout Name: Workflowed To Me (NSL)

Layout Description: Workflowed To Me

Update or Add to: Network Saved Layout (NSL)

Grid Type: Workflow To Me

Default Layout For: Workflow To Me

Save Cancel

Click Save. The Confirmation message will display.

From *My Workflow* window (*Workflowed To Me* tab) you can respond to one or multiple items without having to open the *Workflow* window itself (*Bulk Respond to Workflows*).

Workflowed To Me (02) Workflows I Manage (05)

Show: All Current

	Menu	Lock	Record Id...	Health Status	Health Notes	Action Required	Response	Assignee	Responded By	Due by
<input type="checkbox"/>	<input type="checkbox"/> Respond	<input type="checkbox"/>	2915497	Warning	Step 1: Negative response	Accept	None	Jane S		
<input type="checkbox"/>	<input type="checkbox"/> Respond	<input checked="" type="checkbox"/>	2915496	On Track	Workflow is progressing on schedule	Monitor	None	Jane S		2022/09/23

Export

- Excel
- CSV

Click on the *Respond* button – *workflow Step Details* window will open for the current step.

To open a record, click the RID hyperlink.

The information about *Workflow Status* and *Step Progress* will display.

The *Assignee* is the originally assigned user. The *Responded By* column will be blank in the *All Current* tab.

Export
The *Workflow* list can be exported by clicking the *Export* button. Select the export format :

- Selecting *Excel* or *CSV* option, will export the current page.

Workflowed To Me

The *Workflowed To Me* tab will provide the ability to view the Past, Current and Future Workflows that have *Workflow Steps* assigned to you.

- *All Current* - The items listed on the current workflow list are awaiting responses from you. *All Current* mode will display by default.

Workflowed To Me

- *All Future* - The Future workflow screen will show the items that have the Workflow Steps assigned to you, but the Workflow Step has not been activated yet and you are not required to respond to it at the moment.

	Menu	Lock	Record Id...	Health Status	Health Notes	Action Required	Response	Assignee	Responded By	Due by	Primary Identifier	Lifecycle State	Version
View Details	▼	🔒	2915591	On Track	Workflow is progressing on schedule	Release	None	Jane S			DOC_AGD-0010162	In Work	0.1.0
View Details	▼	🔒	2915591	On Track	Workflow is progressing on schedule	Notify	None	Jane S			DOC_AGD-0010162	In Work	0.1.0

Click the *View Details* button - workflow Step Details window will open for the current step.

The information about Workflow Status and Step Progress will display.

The Assignee is the originally assigned user. The Responded By column will be blank in the *All Future* tab.

Workflowed To Me

- **Past** - The Past Workflow screen contains Workflows that have had responses from you. You can filter information by the Date on the *Past Workflow* screen. Select the *From/To* values and click *Fetch*.

Workflowed To Me (02)

Show: **Past** From: 2022/08/27 To: 2022/09/26 **Fetch**

	Menu	Lock	Record Id...	Health Status	Health Notes	Action Required	Response	Assignee	Responded By	Due by	Primary Identifier	Lifecycle State	Version
View Details	☰	🔒	2915492	On Track	Workflow is progressing on schedule	Accept	Accepted	Jane S	Jane S		DOC_AGD-0010160	In Work	0.1.0
View Details	☰	🔒	2915492	On Track	Workflow is progressing on schedule	Accept	Accepted	Connor P	Jane S		DOC_AGD-0010160	In Work	0.1.0
View Details	☰	🔒	2915494	Advisory	Workflow paused	Prepare	Prepared	Jane S	Jane S		DOC_AGD-0010161	In Work	0.1.0
View Details	☰	🔒	2915496	On Track	Workflow is progressing on schedule	Prepare	Prepared	Jane S	Jane S		ECR-0001409	In Work	0.1.0
View Details	☰	🔒	2915497	Warning	Step 1: Negative response	Prepare	Not Prepared	Ryan D	Jane S		ECR-0001409	In Work	0.2.0

To open the workflow window, click the *View Details* button.

The information about Workflow Status and Step Progress will display.

The *Assignee* is the originally assigned user. The *Responded By* column in the *Past* tab will show who responded to the step.

Go to page: 1 Show rows: 5 1-5 of 6

Workflows I Manage

The *Workflows I Manage* tab will provide the ability to view the *Current* and *Completed* Workflows that have been managed by you.

Workflowed To Me (02) Workflows I Manage (05)

Show: All Current

	All Current	Completed	Who With	Action Required	Step Progress	Health Status	Health Notes	Due by	Planned Completion	Workflow Manager	Record Identifier	Title
View WF	Started		Connor Peers	Prepare	0 of 3	On Track	Workflow is progressing on schedule			Jane Smith	2915591	Bi-Weekly Mod Mee
View WF	Started		Jane Smith	Accept	1 of 3	Warning	Step 1			Smith	2915497	Enterprise Change f
View WF	Started		Jane Smith	Monitor	1 of 2	On Track	Workf			Smith	2915496	Enterprise Change f
View WF	Paused			Approve		Advisory	Wo			Smith	2915494	Report_Functional -
View WF	Started		Aileen Kwok	Notify	2 of 3	On Track	Workf			Smith	2915492	Report_Functional

The information about **Workflow Status** and **Step Progress** will display.

To open the workflow window all steps grid, click the *View WF* button.

The *Who With* column shows who the Workflow is *Pending* with:

- If the workflow is assigned to a user, they are shown in the *Who With* column.
- If the workflow is assigned to a Role, the column is blank.

- *All Current* - The items listed on the *Current Workflows I Manage* are awaiting responses from the users. As a *Workflow Manager*, you can control them. *All Current* mode will display by default.

Workflows I Manage

- **Completed** - The Completed workflows mode will display Workflows that have been Completed. As a Workflow Manager, you can control them.

You can filter information by the Date on the Completed Workflow screen. Select the *From/To* values and click *Fetch*.

To open the workflow window all steps grid, click the *View WF* button.

The *Who With* column will be blank in the *Completed* tab.

The Workflow Status will display as Completed here. The Step Progress will be blank in the *Completed* tab.

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

The following colour coding for the Workflow Health Status is implemented

1. Advisory

WF Status	Step Progress	Health Status	Health Notes
Started	0 of 2	Advisory	Step 1: Escalated
Started	3 of 5	Advisory	Step 4: Overdue
Paused	2 of 3	Advisory	Workflow paused
Not Started	0 of 2	Advisory	Workflow created but not started



If workflow is saved but not started:

- Health Status: Advisory
- WF Status: Not Started
- Health Notes: Workflow created but not started

In case workflow is paused:

- Health Status: Advisory
- WF Status: Paused
- Health Notes: Workflow paused

If Due Date has expired in progress step:

- Health Status: Advisory
- WF Status: Started
- Health Notes: Step 2: Overdue

If Due Date has expired in progress step and step has escalation assignment:

- Health Status: Advisory
- WF Status: Started
- Health Notes: Step 2: Escalated

2. *Warning*
3. *On Track*
4. *Completed*

WF Status	Step Progress	Health Status	Health Notes
Started	0 of 2	On Track	Workflow is progressing on time
Started	4 of 5	Warning	Step 4: Negative Response

WF Status	Health Status	Health Notes
Completed	Warning	Step 4: Negative response
Completed	Completed	Workflow has completed

If No Overdue in progress step:

- Health Status: On Track
- WF Status: Started
- Health Notes: Workflow is progressing on time

If any of the workflow step respond with negative response:

- Health Status: Warning
- WF Status: Started
- Health Notes: Step 1: Negative Response

If the workflow step completed with positive response:

- Health Status: Completed
- WF Status: Completed
- Health Notes: Workflow has completed

If one of the step respond negative:

- Health Status : Warning
- WF Status: Completed
- Health Notes: Step 1: Negative Response