Workflow

Contents

Workflow Overview

The ***Workflow Module*** allows clients to build customized workflows to match business processes. Workflows enable a structured review and approval process, in addition to enforcing accountability through audit trails and workflow routing history. Automated email notifications are sent to responsible users when they have a workflow item to complete.

Term Definitions

When working with the ***Workflow Module***, developing an understanding of several terms associated with components of the workflow structure is important.

Workflow Instances

Workflow instances are a collection of workflow queues and actions related to one process. Typically, workflow instances include all possible phases and actions within one approval, review, or other defined process. Instances can only be related to one object type. Prior to creating workflow queues and actions, an instance must first be created to associate those items together.

Workflow Queues

Workflow queues are phases or stopping points within a workflow. Queues contain actions that may take place within that queue.

Workflow Actions

Workflow actions are items performed within a workflow queue. Actions may be categorized from a variety of types, depending on what needs to take place. See Workflow Action Types for more detail.

User Permissions

User permissions give staff members access and/or responsibility for a workflow action. Users who are assigned permissions on an action receive email notifications for their action, and may manage their actions in ***Activity → Workflow***.

Workflow Icons

Icon	Description
🖶	Print
ℹ	Help
>	Expand
⌄	Collapse
🏁	Initial Queue
+	Create
✎	Edit

Icon	Description
	Configure
	Copy
	Delete
	Restore
↑	Move Up
↓	Move Down

Workflow Security

Managing Workflow Instances

Workflow instances are located in ***Administration → System Administration → Workflow***. Only Organization Administrators can create, edit, copy, or delete workflow instances and related items.

Accessing Workflow Actions

Each responsible user can access workflow actions through the ***Activity Module*** or via the record associated with the workflow. Once an object is enrolled in a user's workflow, the user has visibility into that object.

Managing Workflow Instances

Due to the security measures around workflow instances, only Organization Administrators may create, edit, copy, or delete workflow instances.

Viewing Workflow Instances

Viewing a workflow instance displays basic details added when the workflow instance was created, including: including Object Type, Name, Description, Action Alerts, Days Since Last Action, Users, Unique Identifier, and Status.

To view a workflow instance:

1. Open ***Administration → System Administration → Workflow***.
2. Click on a **workflow instance name.**

Creating Workflow Instances

Creating a workflow instance allows a user to capture basic workflow details, including Object Type, Name, Description, Action Alerts, Days Since Last Action, Users, Unique Identifier, and Status.

➡ To create a workflow instance:

1. Open ***Administration → System Administration → Workflow***.
2. Click the **+ (Create icon)** in the *Icon Bar*.
3. Select the **Object Type**. See Workflow Object Types for more information.
4. Add the workflow instance **Name**.
5. Add the **Description**.
6. Select to receive **Action Alerts** emails.
    a. Select number of **Days Since Last Action** to set the alert.
7. Select **Users** to be notified (optional). Add a **Unique Identifier** (optional).
8. Click **Create**.

Workflow Object Types

When creating a workflow, the user must specify the object type the workflow is for. The list contains a standard set of options shown based on the modules a client has in their AmpliFund account. After selecting an object type when creating the workflow instance, that object type **cannot** be changed. Functionality varies within queues from type to type. Each workflow instance may only be used related to that object. For example, a user could not add a grant budget to workflow instance created for a grant task.

Grants

Grant workflow instances may be used to move a grant through an evaluation process. Most common uses of grant workflows include pre-award organizational approval to submit or post-award organizational approval to request changes to grant.

Opportunity Applications

For clients with the Competitive Award Management Module

Opportunity application workflow instances may be used to move an application through an evaluation process. This type of workflow instance allows for evaluation, scoring, re-opening, rejecting, and approving submitted applications. AmpliFund clients with the ***Competitive Award Management Module*** have access to a sample workflow instance for Opportunity Applications called "Opportunity Application Review."

Editing Workflow Instances

Workflow instance details may be edited at any time. When editing an instance, the name, description, initial queue, unique identifier, and status may be updated. The object type cannot be changed after the workflow instance's initial creation.

➡ To edit a workflow instance:

1. Open ***Administration → System Administration → Workflow***.

2. Click the **(Edit icon)** next to a workflow instance name.
3. Update the information as necessary.
4. Click **Save**.

Copying Workflow Instances

Workflow instances may be copied to carry over all workflow queues, actions, and responsible users to a new workflow instance.

To copy a workflow instance:

1. Open ***Administration → System Administration → Workflow***.
2. Click the **(Copy icon)** next to a workflow instance name.
3. Update the information as necessary.
4. Click **Save**.

Deleting Workflow Instances

Workflow instances may be deleted if they are not in use or were not previously used. Deleting a workflow instance removes it from the list of workflow instances. Deleted workflow instances cannot be selected when enrolling an object in a workflow. After a workflow instance has been deleted, it may be restored to return it to the list of workflow instances.

To delete a workflow instance:

1. Open ***Administration → System Administration → Workflow***.
2. Click the **(Delete icon)** next to a workflow instance name.
3. In the confirmation pop-up window, click **Delete**.

Disabling Workflow Instances

Workflow instances may be disabled if they are not currently in use. Disabling a workflow instances hides them from the list of workflow instances; they can be enabled at any time.

To disable a workflow instance:

1. Open ***Administration → System Administration → Workflow***.
2. Click the **(Edit icon)** next to a workflow instance name.
3. In the *Record Information* section, select **Disabled** from the *Status* dropdown.
4. Click **Save**.

Restoring Workflow Instances

Deleted workflow instances may be restored to show the workflow instance on the list of workflow instances again, and to make it an option when enrolling an object in a workflow.

To restore a workflow instance:

1. Open ***Administration → System Administration → Workflow***.
2. Click the **arrow** in the *Status* column.
3. Hover over **Filter** to show filter menu.
4. In the filter menu, click **Clear** to show deleted and disabled workflow instances.
5. Click the **(Restore icon)** next to a deleted workflow instance name.
6. In the pop-up confirmation window, click **Restore**.

Managing Workflow Queues

Workflow queues are the stopping points or phases within a workflow instance. Queues may contain one or more workflow actions.

Creating Workflow Queues

When creating a workflow queue, users may assign a Name, Description, Change Submission Status, and Users.

To create a workflow queue:

1. Open ***Administration → System Administration → Workflow***.
2. Click the **(Configure icon)** next to a workflow instance name.
3. Click **Add Workflow Queue +**.
4. In the pop-up window, add the workflow queue **Name**.
5. Add the **Description** (optional).
6. For opportunity applications, select the object's status change in the **Change Submission Status To** dropdown (optional).
7. Click **Create**.

Initial Queue

The initial queue of each workflow instance indicates the queue an object is placed into immediately after the object is enrolled in a workflow. When a new workflow instance is created, a queue called *Initial Queue* is automatically created. The Initial Queue may be edited to reflect an organization's first step in the workflow instance.

The Initial Queue may also be deleted if a different queue is selected as initial queue. A queue must be created before it can be selected as the initial queue.

To edit a workflow instance's initial queue:

1. Open ***Administration → System Administration → Workflow***.
2. Click the **(Edit icon)** next to a workflow instance name.
3. Select the **Initial Queue**. This list pulls from the instance's workflow queues.
4. Click **Save**.

Destination Queue

A destination queue is the queue that a send-to-queue action points to. If the destination queue has a disabled status, you cannot send the object to that workflow queue.

Recommendation: *Create all workflow queues before creating workflow actions. Because send-to-queue actions must have a destination, the destination queue must already be part of your queues list.*

Changing Award Status

When creating workflow queues for a grant workflow instance, an additional field appears on the queue details page called **Change Award Status To**. This selector gives grant recipients a means to update the award's status by moving it into a designated workflow queue. When an award is moved into a queue that changes its status, the status will be automatically updated on the grant details page.

Changing Submission Status

For clients with the Competitive Award Management Module

When creating workflow queues for an opportunity application workflow instance, an additional field appears on the queue details page called **Change Submission Status To**. This selector gives funders a means to update an application's status by moving it into a designated workflow queue. When an application is moved into a queue that changes the application status, the applicant organization contact receives an automated email indicating their application's new status. For example, if the **Change Submissions Status To** selector is set to ***Reopened***, the applicant's application would become editable again for the applicant to make updates and re-submit.

Note: *Applications are marked with a **Submitted** status after the applicant has submitted the application. The submitted status remains on an application unless it enters a queue that changes its status. Changing the submission status to **Submitted** is only necessary if the application status is something other than **Submitted** when it enters that queue.*

Editing Workflow Queues

When creating a workflow queue, users may update the queue Name, Description, Change Submission Status, and Users.

➲ To edit a workflow queue:

1. Open ***Administration → System Administration → Workflow***.
2. Click the **(Configure icon)** next to a workflow instance name.
3. Click the **(Edit icon)** next to a workflow queue name.
4. Update the information as necessary.
5. Click **Save**.

Deleting Workflow Queues

Deleting workflow queues removes them from the list of queues within the workflow instance and all of the workflow actions associated with that queue.

A queue cannot be deleted if it is a destination queue from a send-to-queue workflow action. If a user attempts to delete a destination queue, they will receive a warning message indicating which workflow action lists that queue as the destination. The queue must be removed as a destination before it can be deleted.

Important Note: *Once deleted, workflow queues cannot be restored to the queues list.*

To delete a workflow queue:

1. Open ***Administration → System Administration → Workflow***.
2. Click the **(Configure icon)** next to a workflow instance name.
3. Click the **(Delete icon)** next to a workflow queue name.
4. In the confirmation pop-up window, click **Delete**.

Disabling Workflow Queues

A disabled workflow queue will remain on the workflow instance queue list, but it cannot be used when routing an object through a workflow. If a send-to-queue action has a disabled queue as its destination, that send-to-queue action will not appear in the list of available actions.

To disable a workflow queue:

1. Open ***Administration → System Administration → Workflow***.
2. Click the **(Configure icon)** next to a workflow instance name.
3. Click the **(Edit icon)** next to a workflow queue name.
4. In the *Record Information* section, select **Disabled** in the *Status* dropdown.
5. Click **Save**.

Managing Workflow Actions

Workflow actions are created in a workflow queue. Actions may be created, edited, and deleted within each workflow queue.

Workflow Action Types

Workflow action types determines what type of action should be taken by the responsible user. The available action types may vary depending on the workflow object type. When creating workflow actions, the fields may vary based on the action type selected and additional details necessary for that action type.

Action Type	Description	Available on Workflow Object Types

Action Type	Description	Available on Workflow Object Types
Send to Queue	Routes object to another workflow queue	Grants, Opportunity Applications
Complete Task	Assigns responsibility to complete action	Grants, Opportunity Applications
Remove from Workflow	Exits object from workflow	Grants, Opportunity Applications
Create Related Item	Creates Opportunity Application Review or Opportunity Application Completed Form item	Opportunity Applications
Add Attachment	Assigns responsibility to upload file and complete action	Grants, Opportunity Applications
Award Applicant	Creates award for applicant from opportunity	Opportunity Applications

Creating Workflow Actions

When creating a workflow action, the following fields are available: Name, Description, Action Type, and Users. The fields may vary based on the selected workflow action type.

To create a workflow action:

1. Open ***Administration → System Administration → Workflow***.
2. Click the **(Configure icon)** next to a workflow instance name.
3. Click the **+ (Create icon)** next to a workflow queue name.
4. Add the workflow action **Name**.
5. Add the **Description** (optional).
6. Select the **Workflow Action Type**.
7. Select **Users** attached to the action and click **Add** (optional).
8. Click **Save**.

Editing Workflow Actions

When editing a workflow action, the following fields are available: Name, Description, Action Type, and Users. Workflow action types **cannot** be edited after initial creation.

To edit a workflow action:

1. Open ***Administration → System Administration → Workflow***.
2. Click the **(Configure icon)** next to a workflow instance name.

3. Click the > **(Expand icon)** next to a workflow queue.
4. Click the **(Edit icon)** next to an action name.
5. Update the information as necessary.
6. Click **Save**.

Deleting Workflow Actions

Workflow actions may be deleted to remove them from the list of available actions within a workflow queue.

To delete a workflow action:

1. Open ***Administration → System Administration → Workflow***.
2. Click the **(Configure icon)** next to a workflow instance name.
3. Click the > **(Expand icon)** next to a workflow queue.
4. Click the **(Delete icon)** next to an action name.
5. In the confirmation pop-up window, click **Delete**.

Reordering Actions

Workflow actions can be organized in any order.

To reorder actions in the queue:

1. Open ***Administration → System Administration → Workflow***.
2. Click the **(Configure icon)** next to a workflow instance name.
3. Click the > **(Expand icon)** next to a workflow queue.
4. Click the ↑ **(Move Up icon)** or ↓ **(Move Down icon)** next to an action name to move the action up or down in the queue, respectively.

Send-to-Queue Action Type

The send-to-queue action type gives users a way to move an object from one workflow queue to another. When creating a send-to-queue action, a destination queue must be identified. Prior to creating a send-to-queue action, confirm that the destination queue exists on the instance's list of queues.

Recommendation: *Each workflow action should always have at least one send-to-queue action or a remove-from-workflow action. Without one of those action types, the object cannot be moved from that workflow queue. When creating a send-to-queue action type, the available fields are Name, Description, Display Order, Workflow Action Type, and Destination Queue Name.*

Complete Task Action Type

The complete task action type prompts users with a task to complete, the ability to mark the task as complete or incomplete, and include any comments. When creating a complete task action type, the available fields are Name, Description, Display Order, and Workflow Action Type.

Remove-from-Workflow Action Type

The remove-from-workflow action type exits the object from the workflow instance. When creating a workflow action type, the available fields are Name, Description, Display Order, and Workflow Action Type.

Create Related Item Action Type

For clients with the Competitive Award Management Module

The create related item action type creates an Opportunity Application Review or Opportunity Application Completed Form item. The Opportunity Application Review item allows responsible users to indicate if they have reviewed the application. The Opportunity Application Completed Form item allows users to score the application. When creating a create related item action type, the available fields are Name, Description, Display Order, Workflow Action Type, and Related Item Type.

Add Attachment Action Type

The add attachment action type prompts users to attach a file to the workflow action and mark it as complete. When creating an add attachment action type, the available fields are Name, Description, Display Order, and Workflow Action Type.

Award Applicant Action Type

For clients with the Competitive Award Management Module

The award applicant action type creates an award to a recipient, which is connected with the opportunity the application was submitted to. When creating an award applicant action type, the available fields are Name, Description, Display Order, and Workflow Action Type.

User Permissions

User permissions give users access to workflow queues and actions .

Assigning User Permissions

User permissions can be assigned on each workflow queue and action. If a user is assigned to a queue, they will automatically be assigned responsibility for every action in that queue. If a user has responsibility for an action, they receive an email notification to complete their action once the object enters their action’s queue.

To assign user permissions on a workflow queue:

1. Open ***Administration → System Administration → Workflow***.
2. Click the **(Configure icon)** next to a workflow instance name.
3. Click the **(Edit icon)** next to a queue name.
4. Select a **User.** This list pulls from *Administration → System Security → Users.*
5. Click **Add**.
6. Click **Save.**

To assign user permissions on a workflow action:

1. Open ***Administration → System Administration → Workflow***.
2. Click the **(Configure icon)** next to a workflow instance name.
3. Click the **> (Expand icon)** next to a workflow queue.
4. Click the **(Edit icon)** next to an action name.
5. Select a **User.** This list pulls from *Administration → System Security → Users.*
6. Click **Add**.
7. Click **Save.**

Assigning User Permissions on Opportunities

For clients with the Competitive Award Management Module

User permissions for all opportunities can be assigned in the ***Administration Module***. In addition, user permissions may also be assigned per opportunity. This allows users (i.e. reviewers or scorers) to be assigned responsibility to a workflow queue or action.

To assign user permissions on an opportunity workflow queue:

1. Open ***Administration → System Administration → Workflow***.
2. In the *View Options* section, select **Opportunity Application** in the *Workflow Type* dropdown.
3. Click the **(Configure icon)** next to a workflow instance name.
4. Click the **(Edit icon)** next to a queue name.
5. Select a **User.** This list pulls from *Administration → System Security → Users.*
6. Click **Add**.
7. Click **Save.**

To assign user permissions on an opportunity workflow action:

1. Open ***Administration → System Administration → Workflow***.
2. In the *View Options* section, select **Opportunity Application** in the *Workflow Type* dropdown.
3. Click the **(Configure icon)** next to a workflow instance name.
4. Click the **> (Expand icon)** next to a workflow queue.
5. Click the **(Edit icon)** next to an action name.

6. Select a **User.** This list pulls from *Administration → System Security → Users.*
7. Click **Add**.
8. Click **Save.**

Workflow Settings Security

Users permitted to update workflow settings through an opportunity's configuration include Organization Administrators and Opportunity Managers.

Removing User Permissions

User permissions may be removed from a workflow instance if that workflow instance is not currently in use.

To remove user permissions on a workflow action:

1. Open ***Administration → System Administration → Workflow***.
2. Click the **(Configure icon)** next to a workflow instance name.
3. Click the **> (Expand icon)** next to a workflow queue.
4. Click the **(Edit icon)** next to an action name.
6. In the pop-up window, click the **(Delete icon)** next to a user name.

Enrolling Objects in Workflow Instances

Enrolling an object in a workflow instance allows users to move the object through the workflow, and complete the workflow actions for which they are responsible. An object must be created before it can be enrolled.

Grants

To enroll a grant in a workflow instance:

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open ***Grant Workflow tab → Add to Workflow → select a workflow instance.***
4. In the confirmation pop-up window, click **Confirm**.

Grant Tasks

To enroll a grant task in a workflow instance:

1. Open ***Grant Management → Grants → All Grants***.
2. Click a **grant name**.
3. Open ***Tools tab → Tasks***.
4. Click a **task name**.
5. Open ***Grant Workflow tab → Add to Workflow → select a workflow instance.***

6. In the confirmation pop-up window, click **Confirm**.

Budgets

➲ **To enroll a grant budget in a workflow instance:**

1. Open ***Grant Management →Grants →All Grants***.
2. Click a **grant name**.
3. Open ***Pre-Award tab → Submission Budget*** or ***Post-Award tab → Budget***.
4. Open ***Grant Workflow tab →Add to Workflow →select a workflow instance.***
5. In the confirmation pop-up window, click **Confirm**.

Performance Plans

➲ **To enroll a grant performance plan in a workflow instance:**

1. Open ***Grant Management →Grants →All Grants***.
2. Click a **grant name**.
3. Open ***Pre-Award tab → Submission Performance Plan*** or ***Post-Award tab → Performance Plan***.
4. Open ***Performance Plan Workflow tab →Add to Workflow →select a workflow instance.***
5. In the confirmation pop-up window, click **Confirm**.

Opportunities

For clients with the Competitive Award Management module

➲ **To enroll an opportunity in a workflow instance:**

1. Open ***Award Management →Fund Opportunities***.
2. Click an **opportunity name**.
3. Open ***Workflow tab →Add to Workflow →select a workflow instance.***
4. In the confirmation pop-up window, click **Confirm**.

Opportunity Applications

For clients with the Competitive Award Management module

➲ **To enroll an opportunity application in a workflow instance:**

1. Open ***Award Management →Fund Opportunities***.
2. Click an **opportunity name**.
3. Open the ***Applications tab***.
4. Click an **application name**.
5. Open ***Workflow tab →Add to Workflow →select a workflow instance.***
6. In the confirmation pop-up window, click **Confirm**.

Workflow Settings

For clients with the Competitive Award Management module

Within **Workflow Settings**, one or more defined workflows may be assigned to an opportunity. Workflows facilitate the application evaluation, scoring, and awarding process in AmpliFund.

Assigning Workflow(s)

Any workflows created for an **Opportunity Application** can be used when assigning workflows to an opportunity. Any of the assigned workflows can then be used to evaluate applications.

To assign a workflow to an opportunity:

1. Open ***Award Management →Fund Opportunities***.
2. Click an **opportunity name**.
3. Open the ***Configuration tab →Workflow Settings***.
4. Select a **workflow** from the *Choose Workflow* dropdown. This list pulls from *Administration → System Administration → Workflow*.
5. Click **Add**.

Editing Assigned Workflows

After a workflow has been assigned to an opportunity, that workflow may be updated through the opportunity or through the Administration module by Organization Administrators. If the workflow is or was in use on any other opportunities, it cannot be edited.

To edit a workflow from an opportunity:

1. Open ***Award Management →Fund Opportunities***.
2. Click an **opportunity name**.
3. Open the ***Configuration tab →Workflow Settings***.
4. In the *Workflow Details* section, click the **(Edit icon)** next to a workflow.
5. Click the **(Edit icon)** in the *Icon Bar*.
6. Update the information as necessary.
7. Click **Update**.

Removing Assigned Workflows

Workflows may be removed from an opportunity's workflow settings if the workflow was not previously used, or is not currently in use on the opportunity.

To remove a workflow from an opportunity:

1. Open ***Award Management →Fund Opportunities***.
2. Click an **opportunity name**.
3. Open the ***Configuration tab →Workflow Settings***.

4. In the *Workflow Details* section, click the **(Delete icon**) next to a workflow.

Workflow Notifications

Email notifications are sent to users when an object enters a workflow queue that contains their action(s). Responsible users receive email notifications from **no-reply@gotomygrants.com**. Notification emails contain the workflow action name and a link to access that workflow action.

Applicant Workflow Notifications

For clients with the Competitive Award Management Module

Notification emails are sent to applicant organizations when their application is moved to a workflow queue that changes their application's submission status. To learn more, see Changing Submission Status.

Completing Workflow Actions

Users may complete their workflow action when the object enters the workflow queue that contains their action. After a user completes their workflow action, the completion details are included in the workflow item history.

To complete a workflow action:

1. Open ***Activity → Workflow***.
2. Click the **object name**.
3. Open ***Workflow tab → Available Actions → select an action***.
4. In the pop-up window, add **details** (if applicable).
5. Click **Confirm**.

Workflow Task Completion

The **Workflow Task Completion** displays all workflow tasks that have been completed within the workflow instance in which an object is enrolled.

To view an object's workflow task completion:

1. Open the object's ***Workflow tab***.
2. Select **Workflow Task Completion**.

Workflow Item History

Workflow Item History reflects all actions taken on an object enrolled in the workflow. The list displays actions in reverse chronological order, and includes workflow queue names, workflow actions, text associated with each workflow action, the user who completed that action, and the date and time it was completed.

To view an object's workflow item history:

1. Open the object's ***Workflow tab***.
2. Select **Item History**.

To export an object's workflow item history:

1. Open the object's ***Workflow tab***.
2. Select **Item History**.
3. Click the **(Export icon)** in the *Icon Bar*.