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# Workflow (New)

Workflow removes queues and focuses on action-based automation, starting with Status Change. Initially, the new workflow will only be used for payment requests, but will later expand to all object types. Workflow allows flexible routing to users, roles, or departments, with records always residing in an action. Records can also move between workflows.

Account Admins can add, edit, copy, or delete workflows using the Workflow grid page located under **Administration > System Administration > Workflows**.

There is also an Enrolled Records grid tab on the workflow record. The columns on this grid include **Record Type, Parent Record**, **Funder/Recipient**, **Record Name**, **Current Workflow Action**, and **Current Assignees**. Parent records, funder/recipients, records, and actions all link to their associated records.

# Workflow Set Up

Workflow allows users create and manage processes for specific record types. Workflows include configurable actions with automation, routing, and notifications. Users can view and edit workflows in **Administration>System Administration>Workflow**.

## How To View a Workflow

The Workflow details page shows the workflow name, description, enrollable objects, and status.

1. Open **Administration>System Administration>Workflow**.
2. Click a **workflow name**.

## How To Create a Workflow

Workflows contain actions related to one process. Workflows can only be used for payment requests, but will later expand to other enrollable objects.

1. Open **Administration>System Administration>Workflow**.
2. Click the **+ (Create icon)** in the *Icon Bar*.

### Workflow Details

3. Add the workflow **Name**.
4. Add the **Description** (optional).
5. Select the **Objects** that can be enrolled in this workflow
6. Select the **Status**.
    - **Active**: Workflow will be available on all records for the added object type.

- **Inactive**: Workflow is not available on records for the object.
- **Archived**: Workflow is not available on records for the object and also does not appear on the Workflow grid by default

7. Click **Create**.

## How To Edit a Workflow

1. Open **Administration>System Administration>Workflow**.
2. Click the **(Edit icon)** next to a workflow name.

| Name ↑ | Description |
|---|---|
| New Workflow | |

3. Update the information as necessary.
4. Click **Save**.

## How To Delete a Workflow

Prerequisite: Must not have any records enrolled.

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

| Name ↑ | Description |
|---|---|
| New Workflow | |

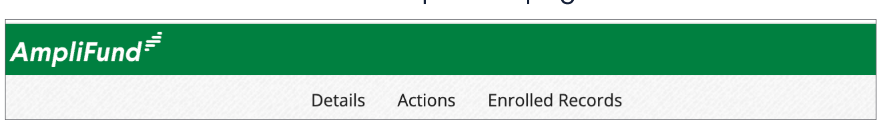
3. In the confirmation pop-up window, click **Delete**.

# Workflow Actions

## How To View a Workflow Action

Users can create, edit, copy, delete, and reorder workflow actions using the workflow actions grid. Grid columns include Name, Routes From, Routes To, Creates, Records Enrolled, and Default assignees.

1. Open **Administration>System Administration>Workflow**.
2. Click a **workflow name**.
3. Click on the **Actions** tab at the top of the page.



# How To Create a Workflow Action

1. Open **Administration>System Administration>Workflow**.
2. Click on a **Workflow Name**.
3. Click on the **Actions** tab at the top of the page.
4. Click the **+ (Create icon)** in the *Icon Bar*.

## Action Details

5. Enter the action **Name**.
6. Enter the action **Description** (optional).

## Automation

7. From the dropdown menu, select an **Automation**.
   - **Status Change**: This automation will automatically update the record's status.
     a. Select **record type**.
     b. Click **+** icon to add.
     c. Select **Updated Status**.

## Routing

8. Select **Routes From**. These are the actions that immediately precedes the current action in the workflow.
9. Select **Routes To**. These are the actions or workflows that follow the current action in the workflow (optional).
   a. Select **Actions** (optional).
   b. Select Workflows (optional).

## Default Assignees

10. Select **User(s)** (optional).
11. Select **Record Roles**. Any user is this role on the record will be assigned. For example, if the Record Role is Grant Manager, then the user who is grant manager will be assigned once the record is enrolled into this action (optional).
12. Select **Departments** (optional).

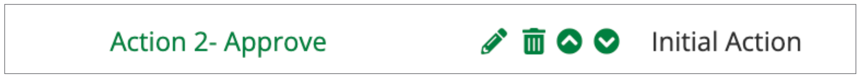
## Notifications

13. Enter the **number of days** after which assignees and notified users should receive an inactivity notification for this workflow. Notifications will repeat every set interval the record remains in this action (optional).
14. Select the **User(s)** that you want to be notified (optional).

**Note**
Assignees will automatically receive notifications.

# How To Edit a Workflow Action

1. Open **Administration>System Administration>Workflow**.
2. Click on a **Workflow Name**.
3. Click on the **Actions** tab at the top of the page.
4. Click the **(Edit icon)** next to a workflow action name.




5. Update the information as necessary.
6. Click **Save**.

# How To Delete a Workflow Action

Users can delete a Workflow Action even if there is a record enrolled in it. Records enrolled in a deleted action will be removed from the Workflow.

1. Open **Administration>System Administration>Workflow**.
2. Click on a **Workflow Name**.
3. Click on the **Actions** tab at the top of the page.
4. Click the **(Delete icon)** next to a workflow action name.


5. In the confirmation pop-up window, click **Delete**.

# How To Add a Status Change Automation

If Status Change is selected as an automation, the record's status will automatically update to the selected status.

1. Open **Administration>System Administration>Workflow**.
2. Click a **workflow name**.
3. Click the **Actions** tab at the top of the page.
4. Click the **(Edit icon)** in the *Icon Bar*.

## Automation

5. Select Status Change from the dropdown menu.
6. Click the **+ (Add icon) to add the automation.**
7. Click **Save**.

## Icons

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- Delete

# *Enrolling Records into Workflow*

In **System Administration > Workflow**, users can create workflows in the new Workflow engine. For initial release, only payment requests can be added as objects to be enrolled. Within the workflow, users can create actions for the record to route through. Records can also be routed between workflows.

# Payment Requests

## How To Enroll a Payment Request Into a Workflow

**Note**
Users can enroll multiple payment requests into one workflow even if the Payment Request is already enrolled in a workflow.

1. Go to **Grant Management > Grants > All Grants**.
2. Click on a **grant name**.
3. Go to **Post-Award > Cash Flow > Payment Requests**.
4. Select the checkboxes next to the **payment request(s)** that you would like to enroll in the workflow.
5. Click the **(Enroll in Workflow icon)** under Actions.
6. In the pop-up window, select a **workflow**.

### Notification(s)

7. Select who you would like to notify under the **Notify Users** dropdown menu. This list pulls from default notified users, but you can add additional users if desired.
8. Click **Enroll**.

**Note**
Users can move a payment request to any action or workflow that is listed under Routes To in Administration.

## How To Move a Payment Request through a Workflow

Prerequisite: Only assignees are permitted to move payment requests within a workflow.

1. Go to **Grant Management > Grants > All Grants**.
2. Click on a **grant name**
3. Go to **Post-Award > Cash Flow > Payment Requests**.
4. Click on a **payment request name**.
5. At the top of the page, select an **action** or **workflow** from the workflow dropdown
6. In the pop-up window, select which users you would like to notify. This

**Note**
The **Workflow Assignee(s)** is view only. You cannot change the assignee(s) using the workflow pop up.

list pulls from default notified users, but you can add additional users if desired.

7. Click **Next** (if applicable).
8. Click **Confirm**.

Note
This feature will still be available even after record is removed from a Workflow.

## How To View Workflow History

The Workflow History Grid allows users to view an enrolled records' history, including actions, workflows, users, or departments that have since been deleted.

1. Go to **Grant Management > Grants > All Grants**.
2. Click on a **grant name**.
3. Go to **Post-Award > Cash Flow > Payment Requests**.
4. Click on a **payment request name**.
5. Go to **Workflow Admin > Workflow History**.

# Workflow Record Management

Account admins have the ability to manage record placement within a workflow by moving records back to a previous step or returning them to the beginning. They can also remove records from workflows entirely. This provides greater flexibility and control over workflow management.

## How To Send a Payment Request Back to the Start

Prerequisite: Must be an Account Admin.

Users can move actions back to the previous action or back to the start.

1. Go to **Grant Management > Grants > All Grants**.
2. Click on a **grant name**.
3. Go to **Post-Award > Cash Flow > Payment Requests**.
4. Click a **payment request name**.
5. Select **Workflow Admin>Record Management**.
6. Select **Back To Start**.
7. Click **Move** in the pop up window.

## How To Move a Payment Request Back to the Previous Action

Prerequisite: Must be an Account Admin.

1. Go to **Grant Management > Grants > All Grants**.
2. Click on a **grant name** .
3. Go to **Post-Award > Cash Flow > Payment Requests**.
4. Click a **payment request name**.
5. Select **Workflow Admin>Record Management**.
6. Select **Back To Previous Action**.
7. Click **Next** (if applicable).
8. Click **Confirm** in the pop up window.

## How To Remove a Payment Request from a Workflow

Prerequisite: Must be an Account Admin.

1. Go to **Grant Management > Grants > All Grants**.
2. Click on a **grant name**.
3. Go to **Post-Award > Cash Flow > Payment Requests**.
4. Click a **payment request name**.
5. Select **Workflow Admin>Record Management**.
6. Select **Remove From Workflow**.
7. Click **Remove** in the pop up window.