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Etrieve Flow Administrator Guide

VERSION 2023.1

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Etrieve Flow Overview

1.1 What is Etrieve Flow?

Etrieve Flow was built from the ground up to be a fully interactive, user-friendly product that allows institutions to automate both basic and complex business processes. The intuitive design allows you to create pathways as simple or multifaceted as your specific processes dictate: reducing current Workflow bottlenecks, increasing visibility and standardizing disparate business operations.

Building Workflows of any type using Etrieve Flow is simple and intuitive with drag and drop functionality within the Workflow designer. There are no complex computer languages to learn. The interface is welcoming, not intimidating. The result is a graphical representation of your business processes that is easy for everyone to understand.

This guide provides an overview and instruction on how to use the Workflow designer. It will also give you an administrative understanding of Etrieve Flow.

1.2 Logging into Etrieve Flow and Page Layout

Before logging into Etrieve Flow, a user must first open a web browser and navigate to the Etrieve Central website address.

Etrieve Central's page layout is divided into four sections:

- Header (top bar)
- Primary Navigation Panel (always displayed, left side of page)
- Alternate Navigation Panel (display toggled on/off, right side of page)
- Flow/Forms/Group Settings

What appears in these four sections will vary depending on the user’s security settings. For instance, the Settings selection in the Alternate Navigation Panel on the right will only display if the user is granted the privilege to manage Workflows or Forms.

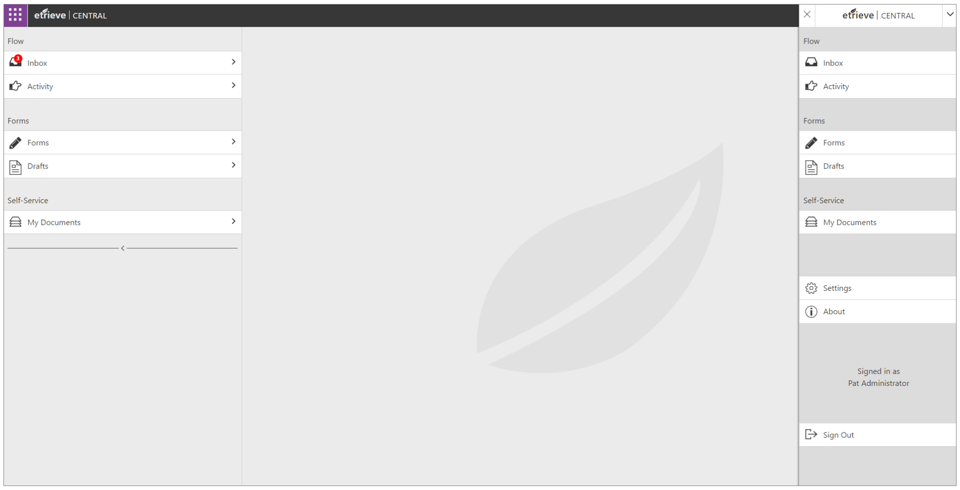


FIGURE 1.1 Etrieve Central Page Layout

1.3 Central Page Layout

To perform any function within Etrieve, users must navigate to the appropriate section of the Navigation Panel. The primary Navigation Panel is located on the left portion of the home page and consists of two sections, Flow and Forms, with sub panels that contain available Flow and Forms options.

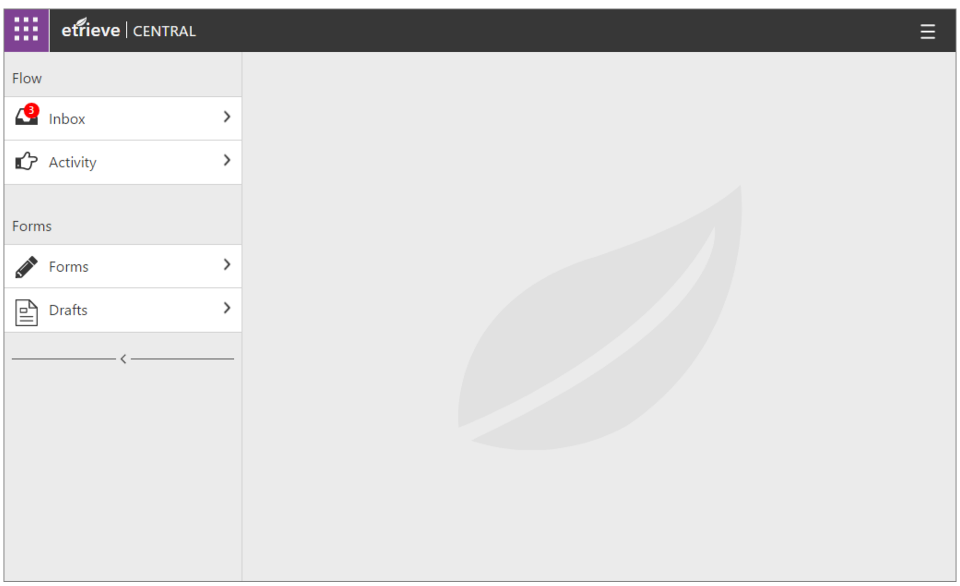


FIGURE 1.2 Etrieve Central Home Page

The Document Viewer displays when the user is working with items in one of the sub panels and will show for Inbox, Activity, Forms and Drafts.

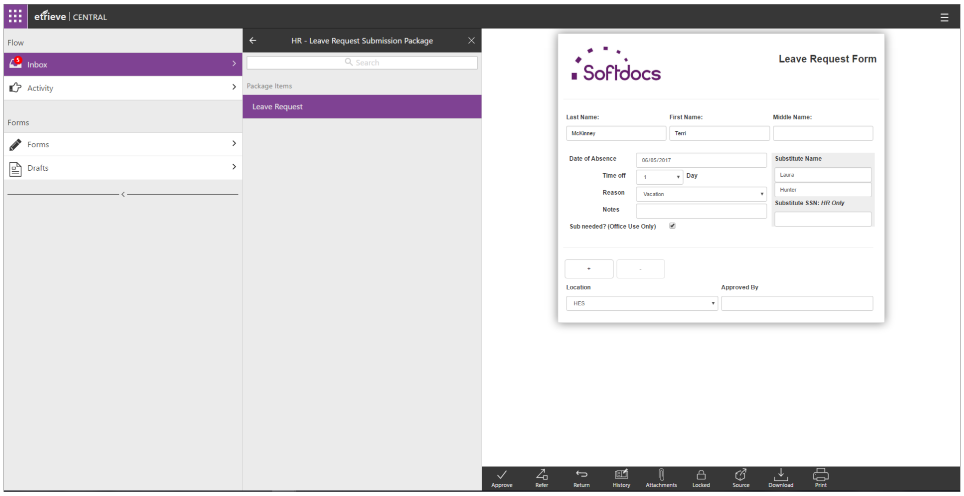


FIGURE 1.3 Etrieve Central Document Viewer

The Header is displayed across the top of the Etrieve Central home page. It is described in greater detail in Section 1.4. Figure 1.4 shows the appearance of the Etrieve Central home page when the Alternate Navigation Panel has been toggled on.

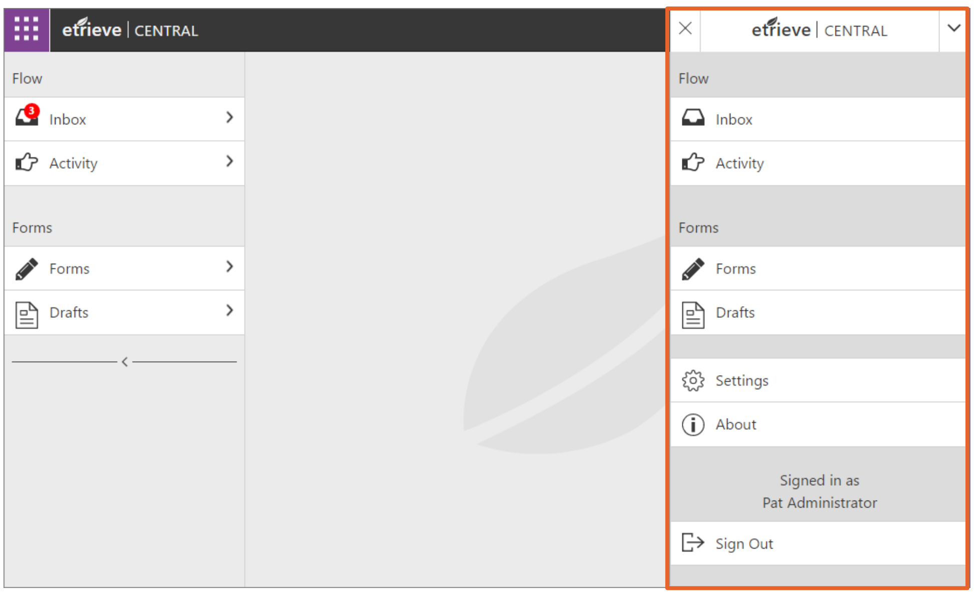


FIGURE 1.4 Etrieve Central Expanded Menu Options

The Primary Navigation Panel may be collapsed to increase the screen space available for the Document Viewer by clicking the arrowhead (<) at the center of the line at the bottom of this Panel. Clicking it again will restore the original Panel size.

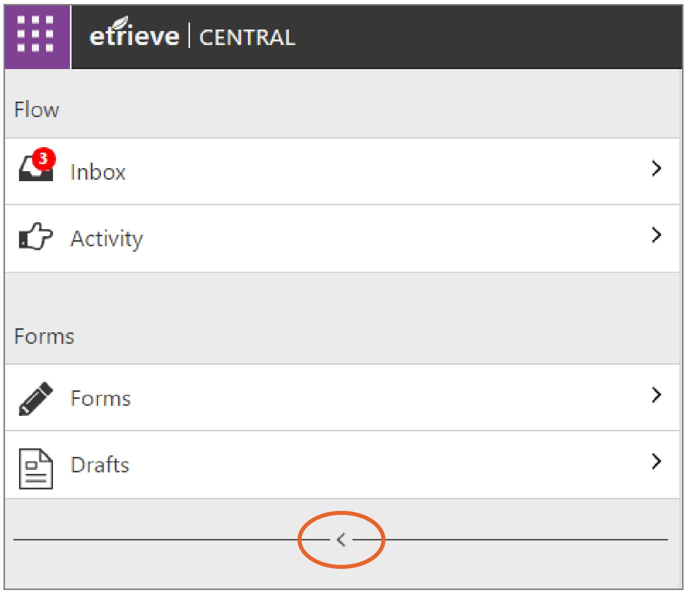


FIGURE 1.5 Collapse Main Navigation Panel

1.4 The Header and Navigation

The Header is the top most bar on the Central Page. It contains three sections:

- App Switcher
- Etrieve | Central (View Reset)
- Alternate Panel Toggle (Three stacked bars)

FIGURE 1.6 The Header

APP SWITCHER | Clicking this icon (nine white squares) opens a three button menu, allowing the user to navigate between Central, Content, and Security, which are the three main Etrieve applications.

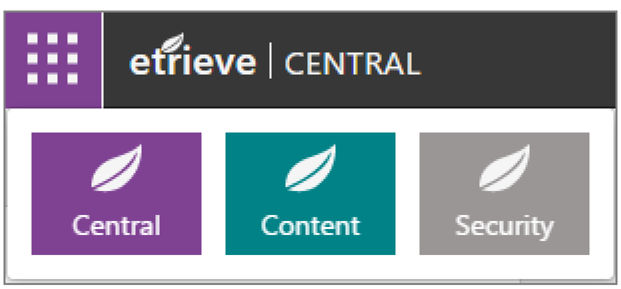


FIGURE 1.7 App Switcher

ETRIEVE | CENTRAL | Clicking here resets the user's view, closing any Inbox packages currently being viewed. It will return the user to the initial Etrieve Central home page.

FIGURE 1.8 Etrieve | Central

MENU ACCESS | Clicking the three stacked bars menu icon on the right toggles on the Alternate Navigation Panel, the elements of which are described below.

The settings menu provides Central Flow and Forms settings that are configured to meet your institution's business processes, forms and Workflows.

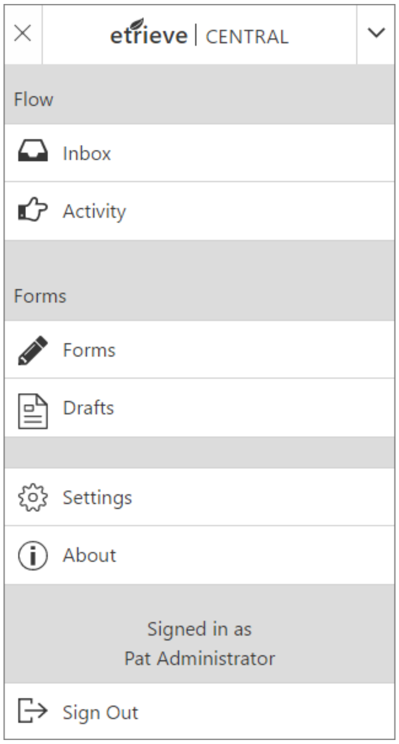


FIGURE 1.9 Etrieve | Central Alternate Navigation Panel

The Alternate Navigation Panel may be toggled off by clicking the X in the upper left of the Panel. Also on this Panel, the user may switch to other Etrieve Applications by clicking the down arrowhead (**v**) in the upper right of the Panel and selecting the desired application.

FLOW AND FORMS ACCESS | After the Alternate Navigation Panel is toggled on, if the user clicks on Inbox, Activity, Forms or Drafts, this Panel will be immediately toggled off, and the equivalent selection on the Primary Navigation Panel will be activated.

SETTINGS COG | The Settings Cog will be visible to users who have access to manage Etrieve Workflows and Forms. Clicking the Cog will open the Central Settings main menu.

ABOUT | About provides details on the version of Etrieve Central that the user is accessing, as well as copyright and licensing information.

USERNAME | The username of the currently logged-in user is displayed here.

SIGN OUT | Signs out the currently logged in user.

The Document Viewer fills the available space on the right side of the Etrieve Central homepage. Users may take a variety of actions on the contents of Packages that have been routed to the Inbox by Workflows. Also, Forms to which the user has been given access may be filled and submitted in this space.

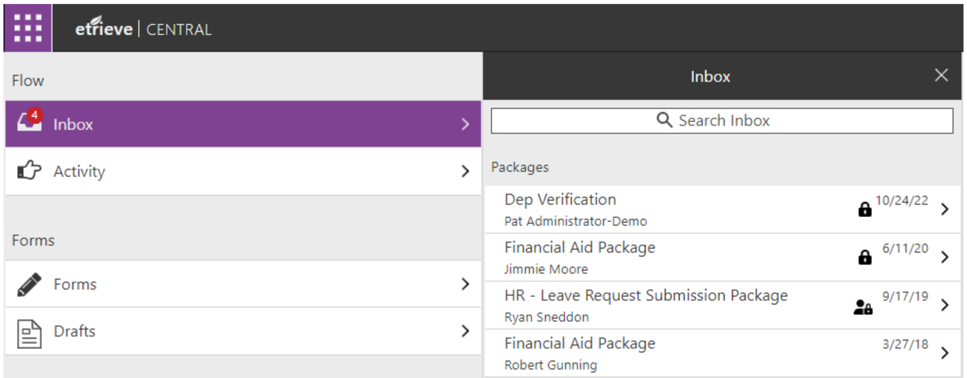


FIGURE 1.10 Etrieve Central Inbox Workflow Packages

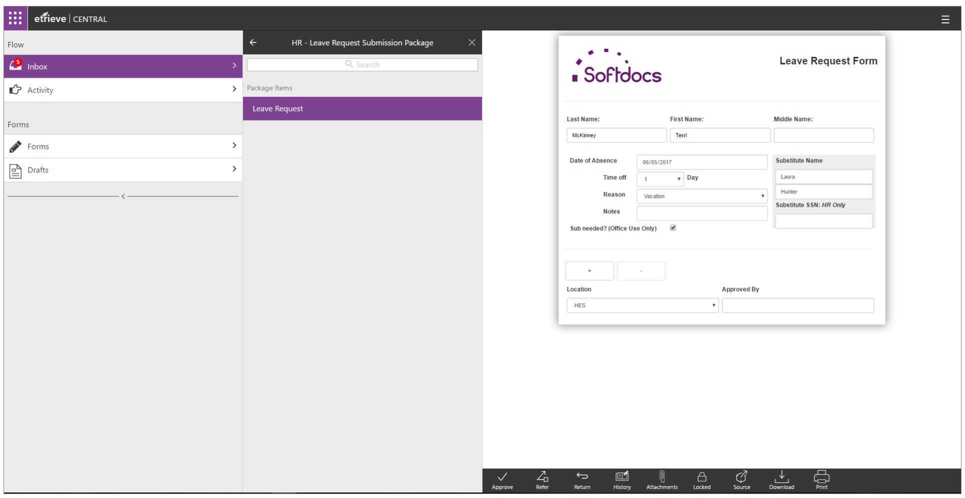


FIGURE 1.11 Etrieve Central Inbox - View Package and Associated Completed Form

2

Etrieve Flow Configuration

2.1 Configuration Menu

The Settings Cog/Menu provides Etrieve Central Administrators access to the Flow, Forms, and Form Groups Settings.

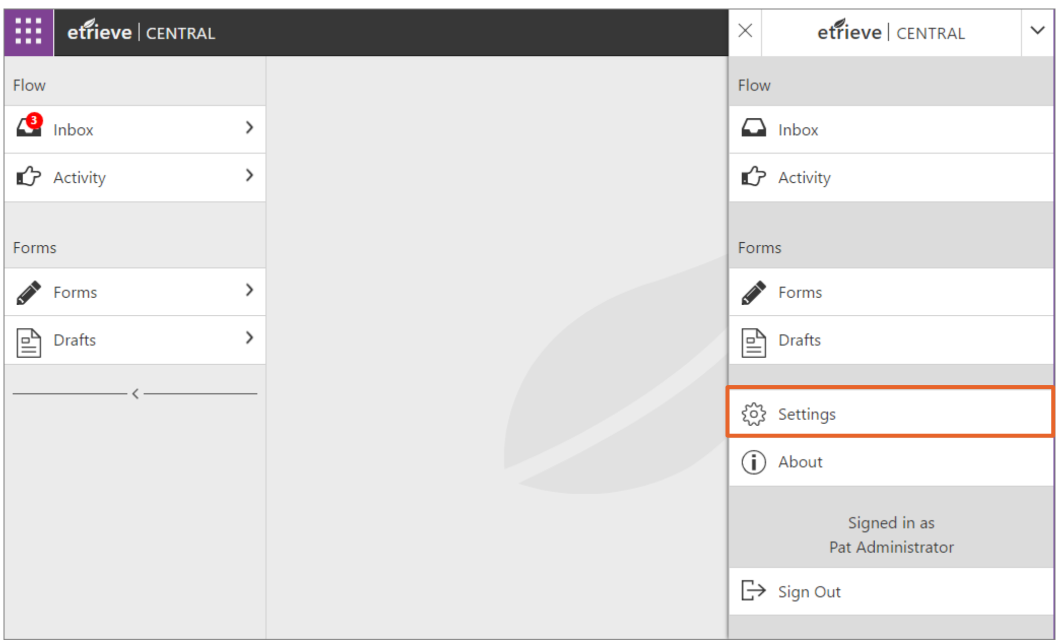


FIGURE 2.1 Etrieve Central Alternate Navigation Panel | Settings

Access to the Settings Cog is a user-based privilege established within Etrieve Security. Click on the Settings Cog to access Flow Configuration and the Settings icons.

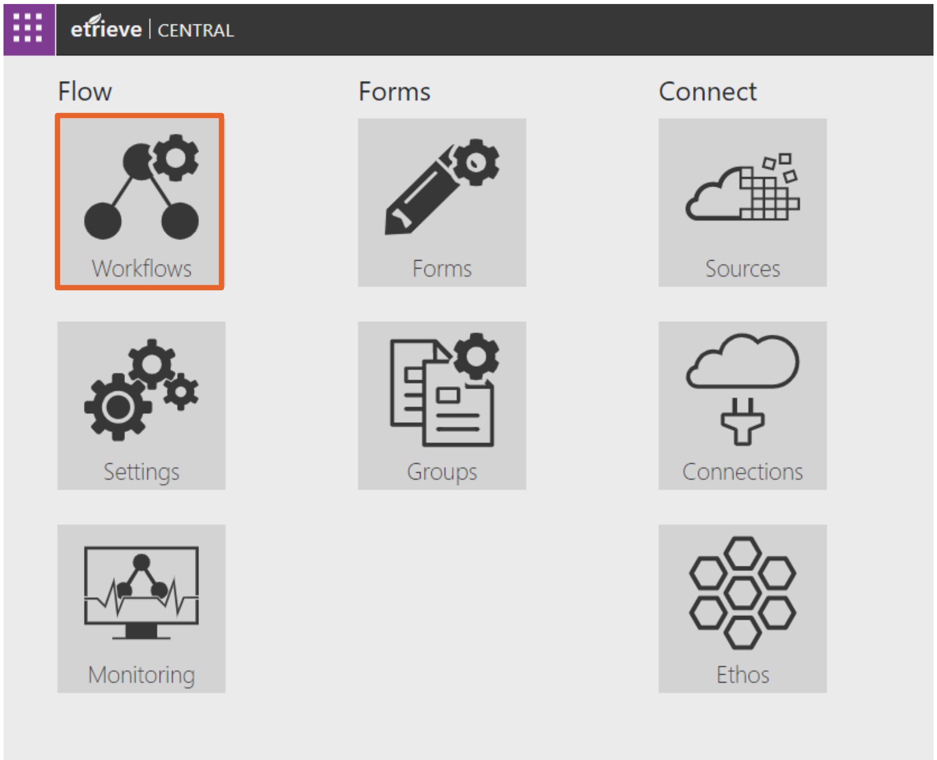


FIGURE 2.2 Etrieve Flow | Workflows

From the Flow Settings page, users can access a separate User Interface that can trigger the reprocessing of all failed items into Flow. Only Content documents that failed to process will be counted under the Submission Errors field.

FIGURE 2.3 Etrieve Flow | Settings

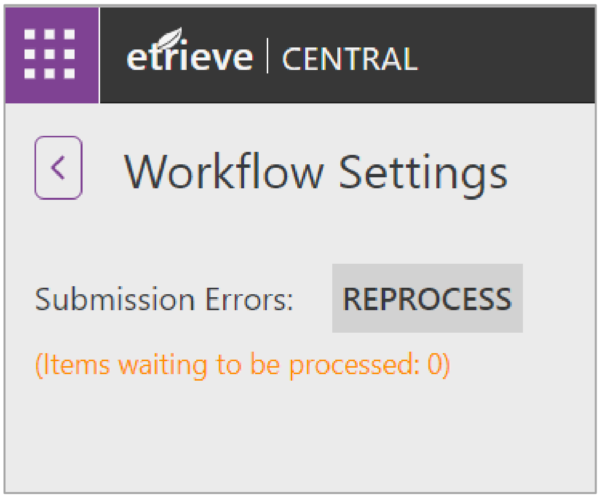


FIGURE 2.4 Etrieve Flow | Settings | User Interface for Re-Processing Errors

2.2 Workflows Main Menu Options

The menu options for Etrieve Workflows consists of four options:

1 Add a new Workflow
2 Edit an existing Workflow
3 Delete an existing Workflow
4 Search for an existing Workflow

FIGURE 2.5 Workflow List

To add a new Workflow, select the Add New Workflow option and the Workflow Settings page will display, which will be explained in further detail in the next chapter.

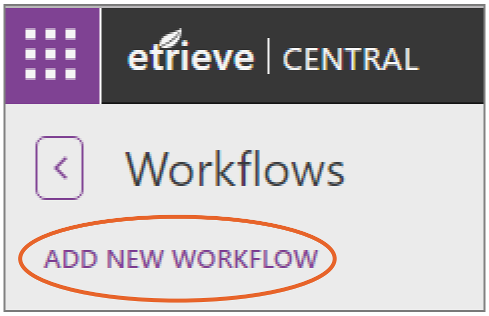


FIGURE 2.6 Add New Workflow

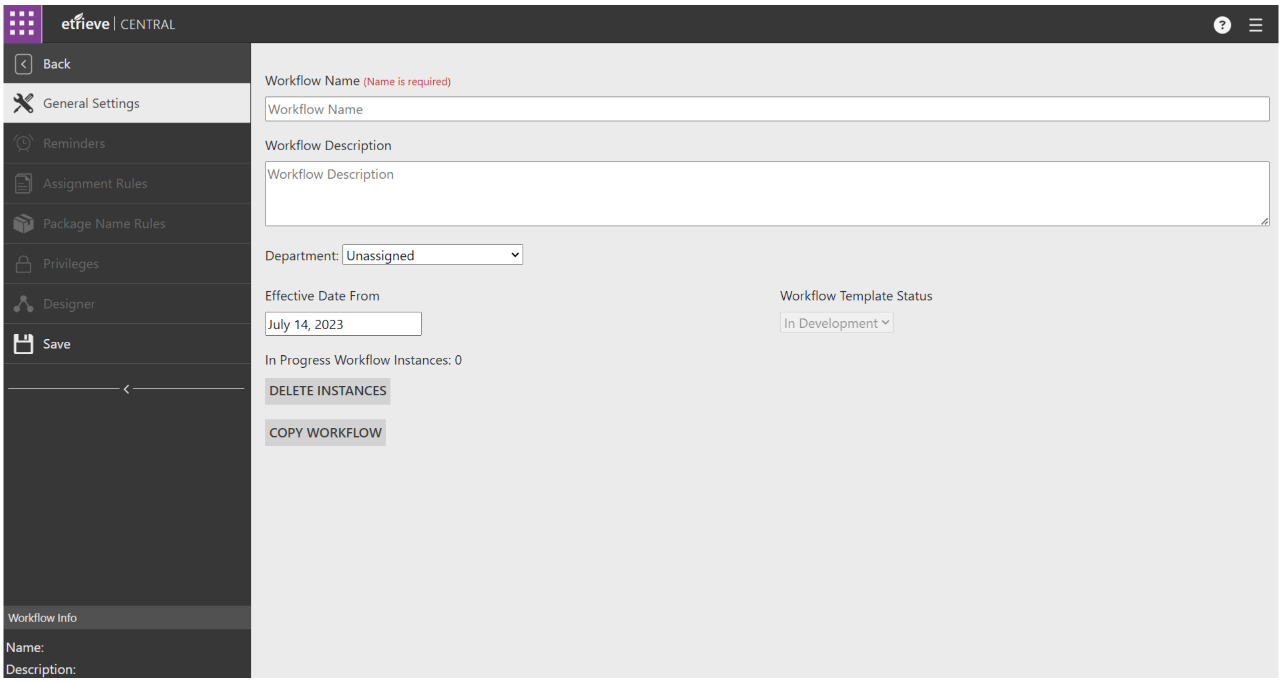


FIGURE 2.7 Workflow Configuration | General Settings Tab

To edit an existing Workflow, either click on 'EDIT', then click the name of the Workflow or click on the Workflow name. Either action will cause the Workflow Configuration Page to display.

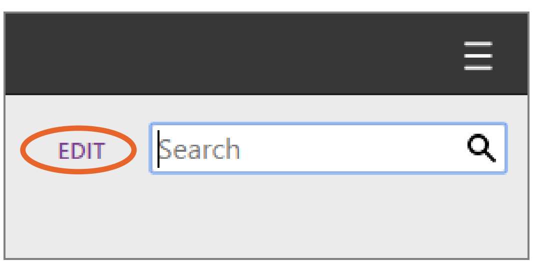


FIGURE 2.8 EDIT Option

To delete an existing Workflow, click on the ‘EDIT’ option and the user will see the ‘DELETE’ and ‘CANCEL’ options. Checkboxes will display next to the name of each Workflow on the list. Click the checkbox(es) beside the desired Workflow(s), then click the word 'DELETE'. A Confirmation Panel will be displayed and the Administrator may click either CONFIRM or CANCEL. Cancel will take the user back to the Workflow List.

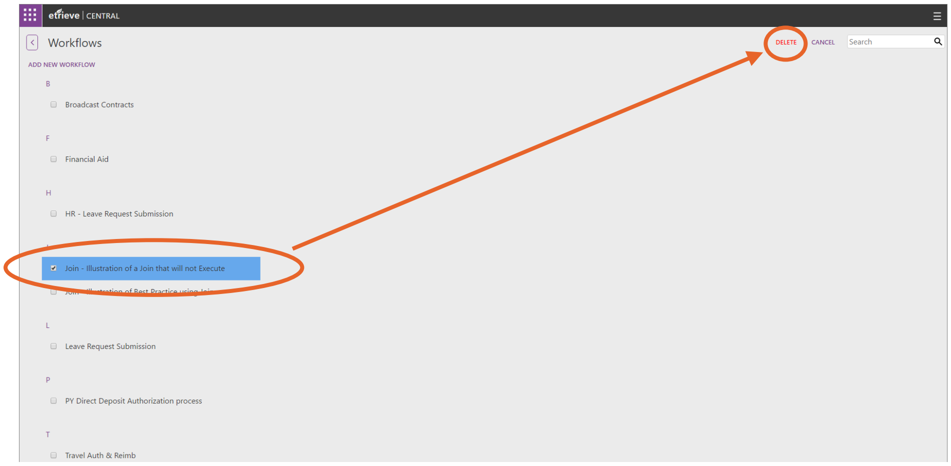


FIGURE 2.9 DELETE Option

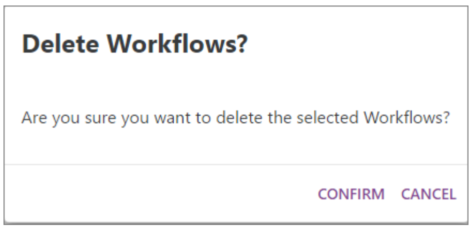


FIGURE 2.10 Delete Workflows Message

If a Workflow is selected for deletion and the Workflow has packages that are In-Progress, the user will be unable to delete the Workflow. A message is returned notifying the user of the failure to delete. The message states; "Workflow has in-progress instances and cannot be deleted."

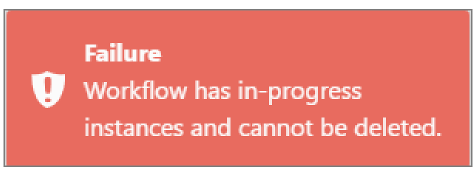


FIGURE 2.11 Failure Workflow Message

Use Search to locate a specific Workflow (s) or to filter the list. Start typing in the Search field and Etrieve Central will start narrowing the options based on what is entered.

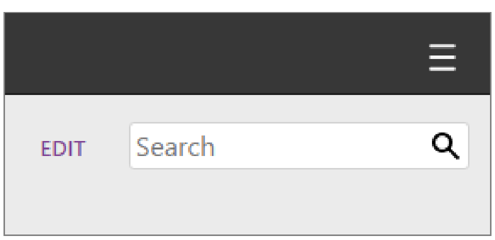


FIGURE 2.11 a Search Option for Existing Workflow

FIGURE 2.11 b Search Option with Results Filtered

3

Etrieve Flow Designer

3.1 Basics of Workflow Configuration

The process of creating a Workflow may be thought of as three primary tasks: Creating the Workflow, Assigning the Document Type (s) or Forms to be processed and Designing the Workflow path. Workflows can be categorized into two different types:

1. SIMPLE WORKFLOW | A Workflow that has a direct actor-to-actor route without taking into account any data on the form or document. An example of a simple Workflow is Financial Aid or Registrar forms. The actor (person) initiates a form and it is automatically routed to the appropriate department (FA or Registrar). The request will show up in the groups Inbox for approval or declination.

2. ADVANCED WORKFLOW | The data present on the document/form, or even the type of document/form may require the creation of an advanced Workflow. An example of a more complex Workflow could be one created to handle various types of admissions applications. The Workflow begins with two sets of navigation rules which evaluate the various types of applications which are received in Admissions. If an application is First Year, Graduate, Concurrent or Unclassified, the Key Field of Application Status is updated to Admissions Counselor Review, and then it routes to a Conditional Actor, which identifies the Admissions Counselor who handles each of those types of applications and delivers to that Counselor's Central Inbox. Then, all of these types of applications are routed to a standard approval process for the large majority of applications. Since these types of applications do not require a transcript evaluation, their approval process is simpler.

   If the application is Accelerated Track/Nursing Transfer, RN-BSN, Returning, Transfer or Visiting, the Key Field for Application Status is updated to Transcript Evaluation and all of these applications are delivered to the Transcript Evaluator Group. After Transcript Evaluation is completed, the Returning, Transfer and Visiting applications get their Application Status Key Field updated to Admissions Counselor Review, and they now join the Workflow for the First Year, Graduate, etc., types of applications.

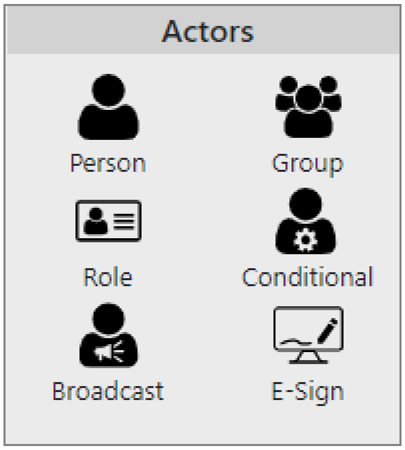
   However, the Nursing application types get their Application Status Key Field updated to Nursing Application Preparation and are routed through a standard approval process in the College of Nursing.

3.2 Workflow Configuration Using Actors, Activities and Navigation Rules

There are three key elements used in Workflow Design: Actors, Activities, and Navigation Rules.

The Actors displayed within the Actors Section provides a method of configuring the needed step to a person or group of people in the Workflow. These Actors are simply dragged and dropped onto the Designer workspace.

3.3 Actors Defined



NOTE: Conditional Actors require the use of the Etrieve Integrations module. If that module was not purchased, although a Conditional Actor may be dropped on the Designer Workspace, it will not be configurable, and the Workflow will display a red exclamation mark on the menu to alert the Administrator of the error condition.

Forms used in an E-Sign workflow can have sources associated to them. If the source is an anonymous source, then it will execute while on the E-Sign step. If the source is not anonymous, then the source will not execute while on the E-Sign step.

FIGURE 3.1 Flow Actors

PERSON | A single user will be chosen in the configuration, and only that user will receive the package.

GROUP | All users who are members of the chosen group will receive the package.

ROLE | All users who have been assigned to the selected role will receive the package (this Actor is not commonly used).

CONDITIONAL | A single user or user group will receive the package. The user or user group to receive the package is “conditional” based on form values and integration (recipient can differ from package to package).

BROADCAST ACTOR | A broadcast actor typically allows the representation of steps so that broadcast routing can occur at the first step of a Workflow. Broadcast routing can be incorporated into a business flow, which enables the Broadcast & Preview actions for the originator & the Approve & Denials for the recipients of the broadcasted form. Senders of broadcast forms commonly use this feature to manage Contracts and Policy Changes. Leveraging the Broadcast Actor with forms are commonly used to manage Contracts. This will result in fewer users to filter from, fewer irrelevant filters to manage, and the pre-population of data that is automatically available.

This actor provides the ability to configure the following:

- Send a form to multiple users.
- Determine recipients for Broadcast Routing.
- Apply filters to narrow a list of recipients.
- Pre-population of the broadcasted forms with recipient-specific data from an integration source configured on the Broadcast Actor step.
- Preview form instances with pre-populated data before sending.
- Search for a form instance sent to a specific user in the Activity to view its Workflow status.

E-SIGN | An E-Sign actor step allows the form to be routed to a Signer Recipient outside of the institution who need to sign documents. For example, an institution user (Financial Aid Administrator or Student) has a form (Dependent Verification Worksheet/Form) which needs to be sent to the non-institutional user (a Parent) using the Parent’s email address. This allows the Parent to receive the form and provide an approval of intent and consent to sign and do business electronically without having an internal account. If configured, the Parent will receive the link to the signed document via email after completion.

The E-Sign step has two navigation hubs: Submit (Approve) and Deny. It will route using these hubs just like other Actors do today.

When configuring an E-Sign actor on a workflow, the Administrator must provide fields from the form which contain the Signer Recipient's email address, the fields which need to be completed/signed and which email template that will be used to send to the Signer Recipient the form which needs his/she signature.

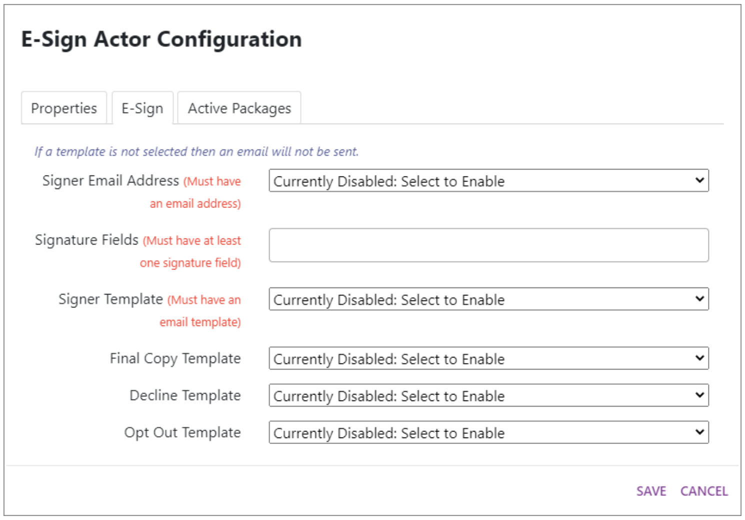


FIGURE 3.2 E-Sign Actor Configure Menu

NOTE: Only designated fields provided in the "Signature Field" will be editable on the form for the Signer Recipient. Only Forms can be used with E-Sign.

When more than one form is used for the workflow, the E-Sign step will indicate which designated fields are common fields across the associated forms and which ones are in use as part of the "Signer Email Address" and "Signature Fields" dropdowns. It will also warn when an uncommon field is selected on the E-Sign Step. If the associated form is removed, all signature and email fields will be cleared. Selection of fields in the "Signer Email Address" and "Signature Fields" are dynamic in that it will not allow an already used field to be chosen.

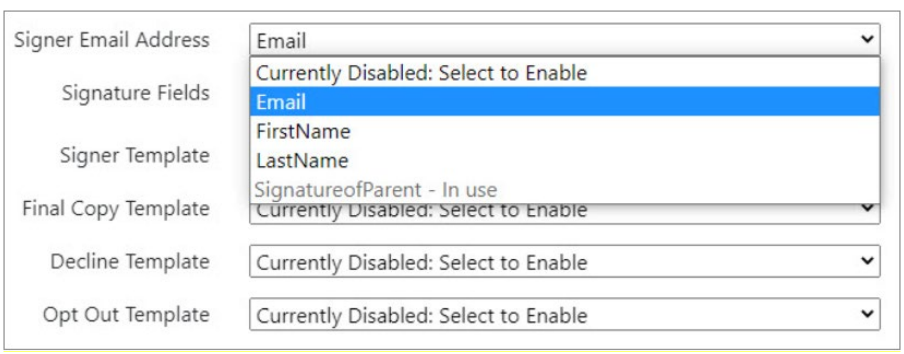


FIGURE 3.3 E-Sign Step indicating 'In Use' field

FIGURE 3.4 E-Sign Step indicating 'Common' field

The E-Sign actor allows optional email templates to be selected which will be sent to the Signer Recipient base on actions they select on the form.

- Final Copy Template - Provides an email with a link to the signed form and provides final instructions to the Signer Recipient after they signed the form.
- Decline Template – Provides an email to the Signer Recipient after he/she declines signing which lets the Signer Recipient know the package was declined and provide information about what decline entails.
- Opt Out Template – Provides an email to the Signer Recipient after he/she opted out of signing which lets the Signer Recipient know the package was opted out and provide information about what opting out entails.

More information about email templates can be found in section 5 of this document.

ENFORCE PACKAGE REVIEW | Administrator users have the option to enforce package review by required fields on any decision actor. This option can be configured on any actor step in the workflow designer, including a person, group, role, broadcast, or conditional actor. This option will ensure that required fields are completed by the appropriate person at the appropriate step in the workflow. This setting will default to true for any new Actor step that is added.

ENABLE REFER | Administrator users have the option to allow or deny users the ability to refer a package at a specific actor step in a workflow. This option can be configured on any actor step in the workflow designer, including a person, group, role, broadcast, or conditional actor. This setting will default to Enabled for any new Actor step that is added.

ENABLE RETURN TO PREVIOUS | Administrator users have the option to allow or deny users the ability to return a package to a previous step in a workflow. This option can be configured on any actor step in the workflow designer, including a person, group, role, broadcast, or conditional actor. This setting will default to Enabled for any new Actor step that is added.

ACTOR NOT FOUND | When a user, group, or role is deleted from Security, but was assigned to a step in the workflow, an exclamation indicator appears on the Designer tab and on the Actor step. Additionally, the Actor Step will display 'Actor not found' on the tooltip and within the Step configuration.

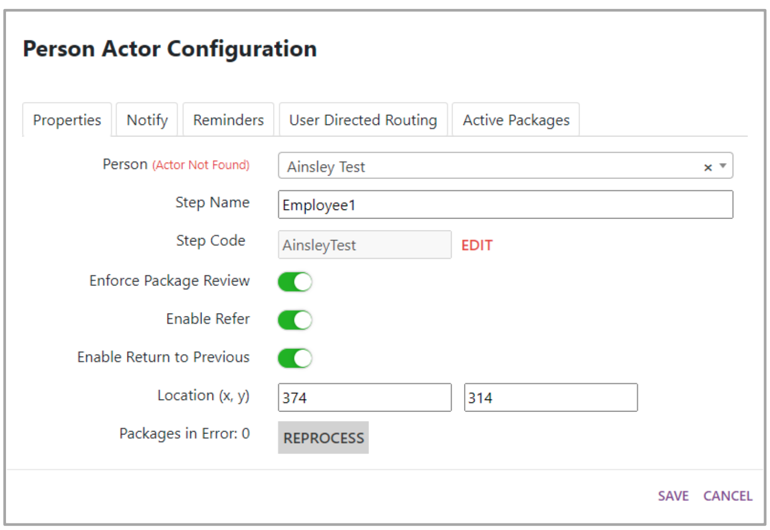


FIGURE 3.5 'Actor Not Found' Warning

3.4 Activities Defined

Activities are the actions which may be taken on the Document/Form Packages which are processed in the Workflow. As with Actors, they are dragged and dropped onto the Designer Workspace.

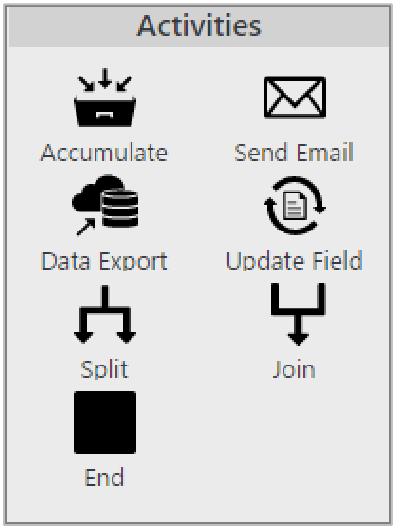


FIGURE 3.6 Flow Activities

ACCUMULATE | This activity is used to "accumulate" multiple items to be combined and routed as a single package once the parameters of the accumulation are satisfied. This activity is often used for the onboarding process. Example: An Accumulation Activity will be configured to accumulate the originators W-4, Personnel Action Form, Direct Deposit Form, etc., based on the Employee ID, effectively making these forms route as one package to avoid receiving multiple forms in separate packages (all forms are then routed together). Once all forms are accumulated, the new form package will route to the next Actor/Activity containing all of the completed onboarding forms.

SEND EMAIL | This activity will send an email to a single email address. The email template, as well as the email address of the recipient, will need to be configured. For multiple recipients add multiple "Send Email" activities.

DATA EXPORT | This activity can be used to export data from a form to an integrated table. This process is often used for reporting. The table integration will need to be configured, and the desired form inputs will have to be marked as "key fields" in the Forms Settings for the data-export activity to write the form input values to the designated table. Each new form that passes through this activity in a Workflow will write a new row to this table – all key field values will be exported to the table as columns in that form's row. The ID's of the key fields will need to match the column names of the table.

NOTE | If an export is configured to an End Step, the system will automatically create a folder if one does not already exist. This will avoid the need for administrators to manually create a folder.

NOTE | Web Sources with an Action Type of "Edit" can be used for Data Exports and are available to be selected from the Integration Mapping drop-down.

UPDATE FIELD | Used in routing a Content document, updates a specified field value. Unused in the routing of forms.

SPLIT | This activity is used to duplicate the package to allow the package to be routed to multiple actors/activities simultaneously.

NOTE | This activity is not intended for collaborative editing.

JOIN | This activity combines packages that were previously split into one single package. The number of split packages must equal the number of packages that are being routed into the join for routing to execute successfully.

END | Ends the Workflow activity and is configurable to export the package and a key field document. The Document Type name field is required when configuring an end step; without a name the workflow cannot be saved.

NOTE | An error message will display whenever a form or document type that is assigned to the current workflow is removed or is missing. This can occur for any of the above activities.

3.5 Connectors Defined

Connectors are the lines between Actors and Activities that determine the order and direction of the Workflow. Connectors are created by dragging and dropping from one Actor/Activity to another. Multiple Connectors can originate from the same Actor/Activity. When multiple Connectors are used, Navigation Rules determine the Connector the package uses.

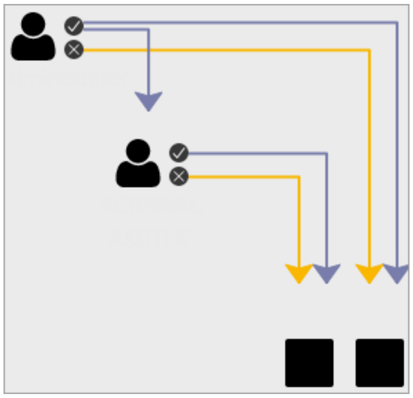


FIGURE 3.7 Connectors

APPROVE/SUBMIT CONNECTOR | To create a Connector between two Actors/Activities when a package is Submitted or Approved, click and drag from the ✓ icon to the desired Actor/Activity.

NOTE | Referral recipients only have the option to Approve a package.

DECLINE CONNECTOR | To create a Connector between two Actors/Activities when a package is Declined, click and drag from the ⊗ icon to the desired Actor/Activity.

NAVIGATION RULE | Navigation Rules are used to select a Connector based on the configured criteria. Navigation Rules can be set up based on Key Fields or Actor Attributes. Navigation Rules are accessed by clicking the settings cog of a Connector. Any Connector with a Navigation Rule on it will be indicated by a small lever icon.

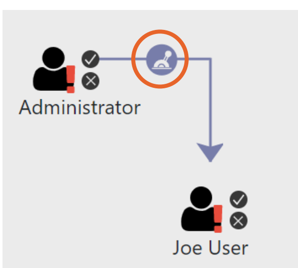


FIGURE 3.8 Navigation Rule Indicator

ACTIVE PACKAGES SEARCH | Adminstrators can search for packages at a step within workflow design.

3.6 Create, Assign and Configure

3.6.1 General Settings of Workflow

NAME | The Workflow is given a unique, descriptive name that can easily be distinguished.

DESCRIPTION | The description is a high-level description of the Workflow and its purpose.

DEPARTMENT | Use this field to assign the Department with administrative privileges for this Workflow. If department access has not been granted, leave Unassigned.

EFFECTIVE DATE | The date that the Workflow will be put in production.

TEMPLATE STATUS | The current state of the Workflow.

- In Development – Current Workflow Administrator is developing. (This is the default setting of a template status)
- Active – Active Workflow, all new documents will be processed and the Workflow is not editable.
- Suspended – For use when the Workflow needs to be edited or is no longer in use. Any active packages that are in the workflow will continue to be routed.

SEND NOTIFICATION FOR LATE PACKAGES | The monitoring of package notifications can be turned on or off by this toggle. When toggled on, the indicated user will receive an email if a package has not completely processed during the specified time frame.

NOTIFICATION EMAIL ADDRESS | The Email address that will receive the notification Email when a package is active in the workflow longer than the specified time frame.

NOTIFY AFTER HOW MANY HOURS | Indicate the number of hours that is expected to have passed before the system will send the notification email.

DELETE INSTANCES | When a Workflow is active and has items routing, the total number will display as "In Progress Workflow Instances." An administrator can "DELETE INSTANCES," which will delete ALL instances inside the Workflow.

IMPORTANT TO NOTE | This should only be used during testing.

COPY WORKFLOW | Within a single environment, workflows can be copied to a new workflow. When selected, a pop-up will appear that prompts the user to input a name, which must be a unique name from all other workflows. The workflow details can then be modified to accommodate the new workflow business processes.

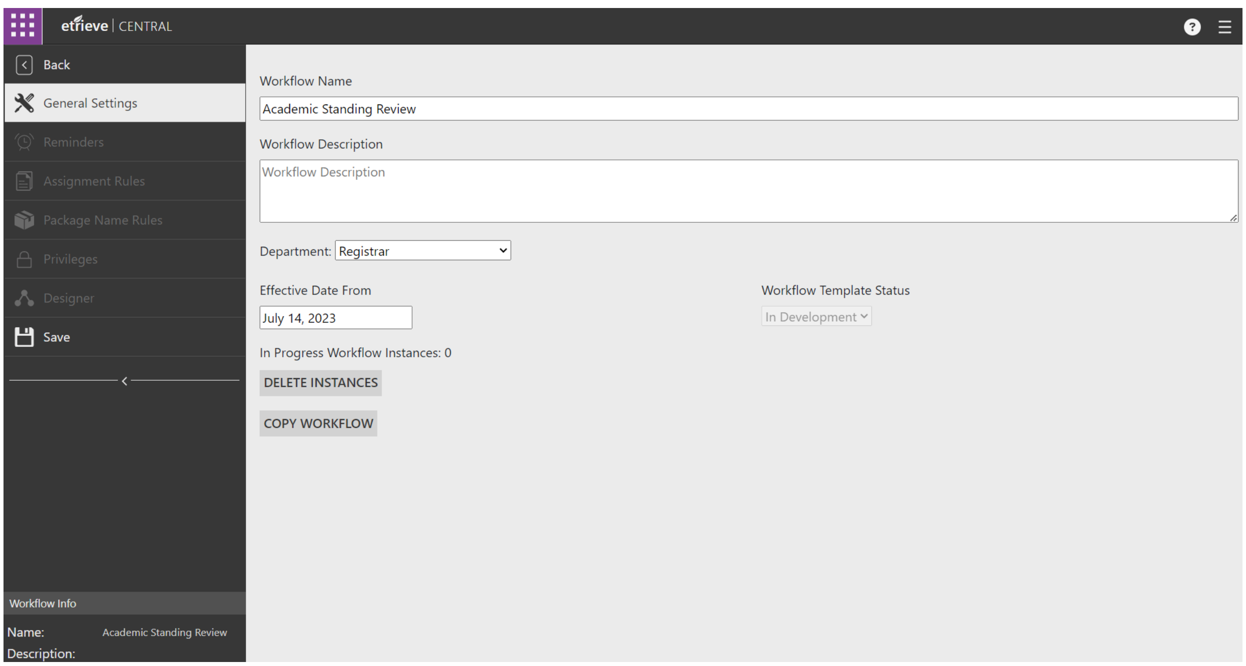


FIGURE 3.9 General Settings

3.6.2 Reminders

Allows a Workflow Administrator to indicate the Workflow and Step level Reminders that will be associated with this Workflow.

Workflow level Reminders will send one email to a specified user or users when a package has been in process for a certain amount of time. Step level Reminders are used to send emails as a reminder to a user or multiple users who belong to a Group/Role after a package has been in the user(s) inbox for a certain amount of time. That period of time is configured in the Workflow Designer Admin.

NOTE | Workflow and Step level Reminders, enabled or disabled, are separate processes from the emails sent out to users if the Notify tab is configured to send an email. Emails that get sent when a package moves through a workflow are not dependent upon Reminders being set up. Reminders are generally used to send messages if items have been sitting in inboxes too long.

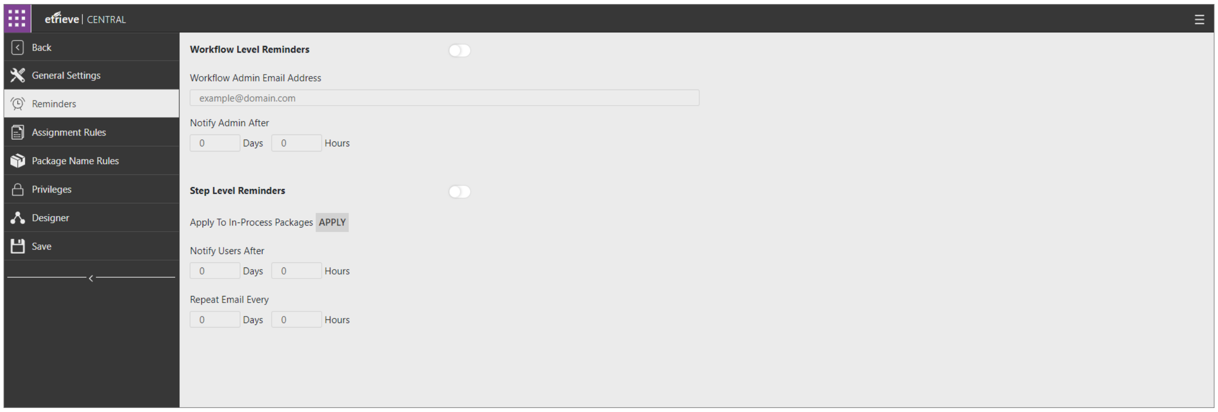


FIGURE 3.10 Reminders

WORKFLOW LEVEL | Workflow level Reminders are enabled and disabled using the corresponding On/Off toggle switch. If enabled, pending notifications for the packages in the workflow will be checked at the top of each hour. Once any notification date passes the current date and time, then a notification email will be generated and sent out. If disabled, any pending notifications will not be sent out. Also, notifications will not be created for packages generated with Reminders disabled, even if Reminders are then enabled at a later time.

- Workflow Admin Email Address – This is the email address for the administrator who will receive the reminder email. Multiple emails can be entered here, separated by semicolons.
- Days and Hours | Numerical Inputs – Together, these inputs determine how long until a Workflow level Reminder is sent to the Admin.

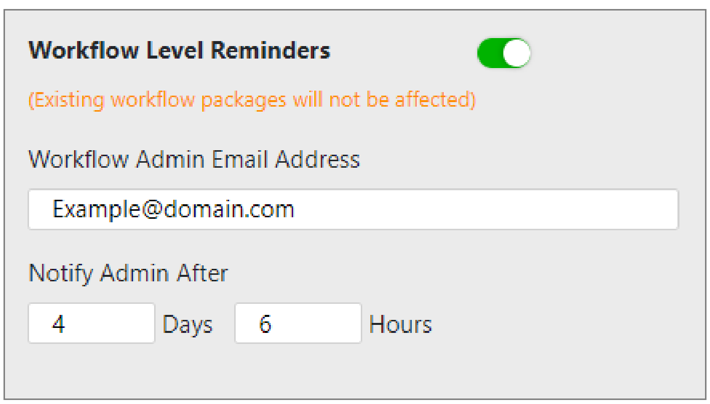


FIGURE 3.11 Workflow Level Reminders

As an example, the Days input has been set to 4 and the Hours input to 6. The admin email is set to Example@domain.com. A form is submitted to kick off the workflow on February 15th at 9:30 A.M. If the package has not been submitted to the End Step by February 19th at 3:30 P.M., then Example@domain.com will receive a reminder email around 4:00 P.M. that day.

STEP LEVEL | Step level Reminders are enabled and disabled using the corresponding On/Off toggle switch. If enabled, pending notifications for the step will be checked at the top of each hour. Once any notification date passes the current date and time, and is in a step with "Enable Reminder Notification" turned on, then notification emails will be generated and sent out. If disabled, any pending notifications will not be sent out. Also, notifications will not be created for packages generated with Reminders disabled, even if Reminders are then enabled at a later time. Finally, turning this switch off will disable the On/Off switch in the Reminder Configurations for each actor step.

- Apply to In-Process Packages – If Step level Reminders are turned on, this button allows the user to apply notifications to existing Task Queues. This button is only enabled after all changes have been saved to the workflow.

- Notify Users After | Numerical Inputs – Together, these inputs determine how long until the first reminder email will be sent after a package has landed in a user's inbox.
- Repeat Email Every | Numerical Inputs – Together, these inputs determine how often reminder emails will be sent to a user for a package sitting in their inbox.

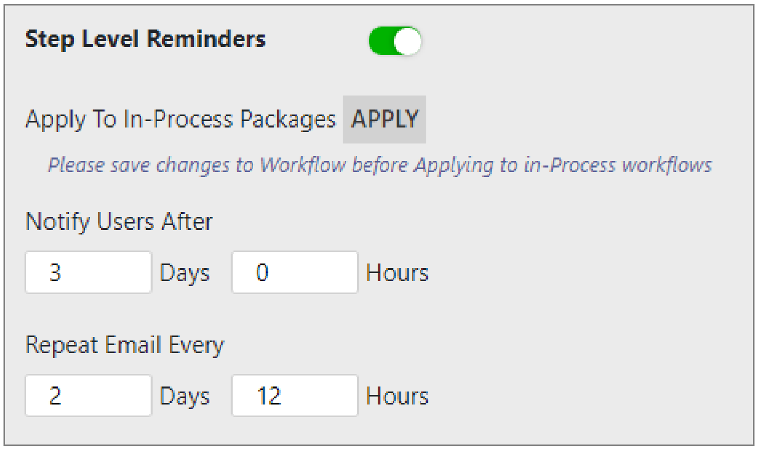


FIGURE 3.12 Step Level Reminders

3.6.2 Assignment Rules

Indicate the forms and/or document types that will be associated with this Workflow. To select a new item, click on the 'Available' radio button.

SEARCH | Use search to locate a particular form or Document Type by typing in the Search Bar.

FILTER BY | A filter can be applied by selecting one of the options:

- All
- Document Types
- Forms

DELETE | The delete function will remove the step properties associated to a given workflow assignment from the step. When removing an Assignment Rule, the system will display a confirmation box if the Assignment Rule is a part of any step's properties.

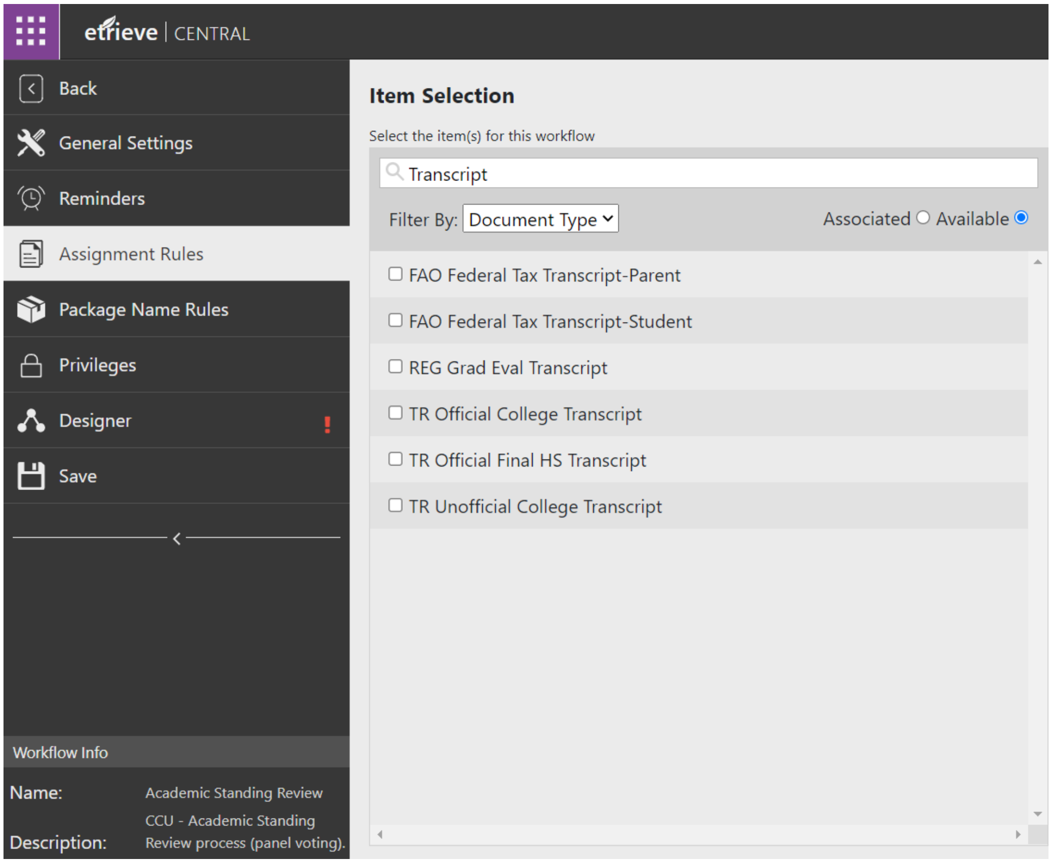


FIGURE 3.13 Assignment Rules

3.6.3 Package Name Rules

A package name is a naming convention that will be associated with a given Workflow. There are three options for naming conventions of the Workflow:

DEFAULT | The system will automatically label the Package Name using the Name of the Workflow established in General Settings.

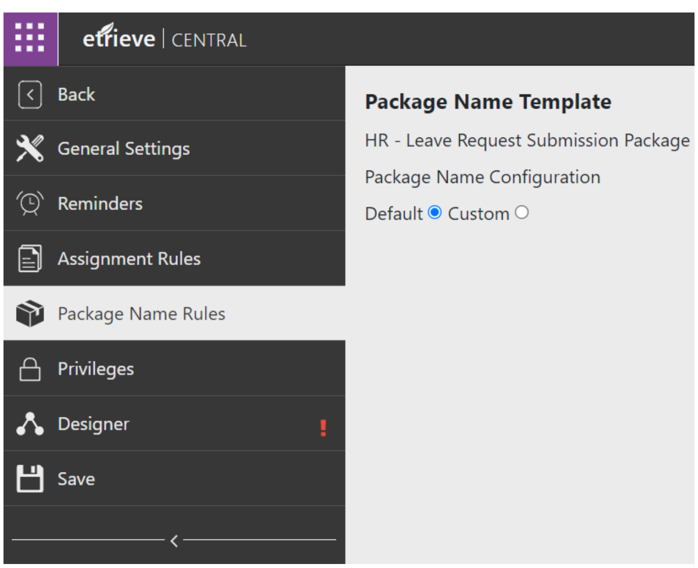


FIGURE 3.14 Package Name Template | Default

CUSTOM | Selecting "Custom" will allow you to type your own Package Name aside from the Default. Clicking inside the box will list the available key fields or inputs you can use in conjunction with words you type. This can be used to provide originator information as searchable items in the inbox.

If a Content document type was selected in the assignment rules, then the key fields will be available to use. If a Central form was selected in the assignment rules, then the selected input fields are available to use. If multiple documents or forms are associated with the Workflow, the key field codes/input field IDs which all share the same name will appear in the drop-down with the label "common."

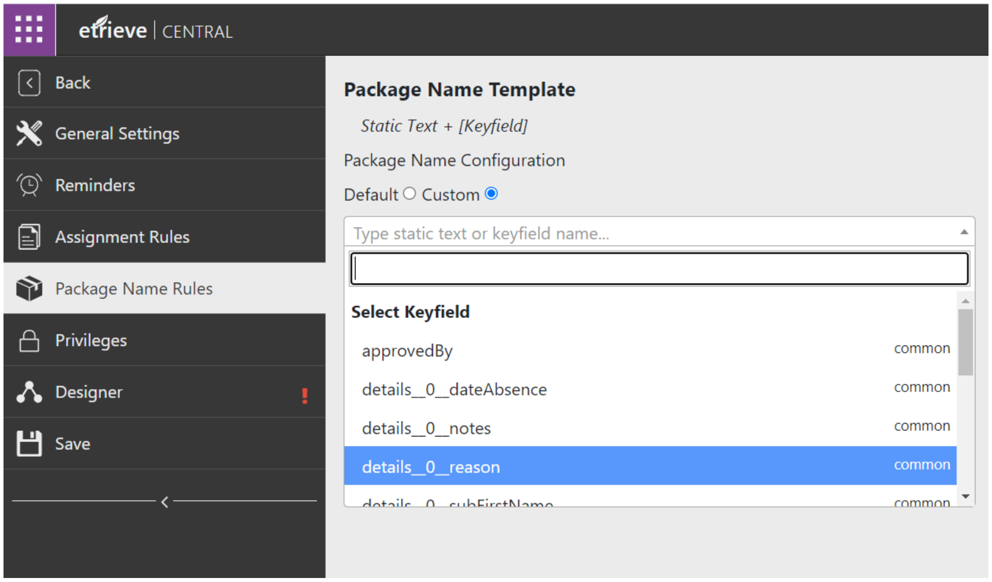


FIGURE 3.15 Package Name Template | Custom

ITEM TYPE NAME | Selecting "Item Type Name" will allow you to select a form name for a submitted form or document type name for a submitted Content document to use as Package Name.

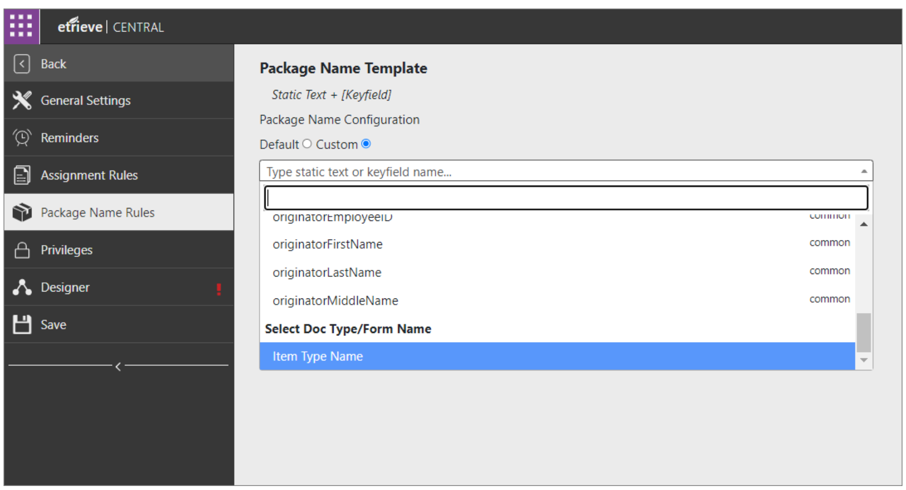


FIGURE 3.16 Package Name Template | Item Type Name

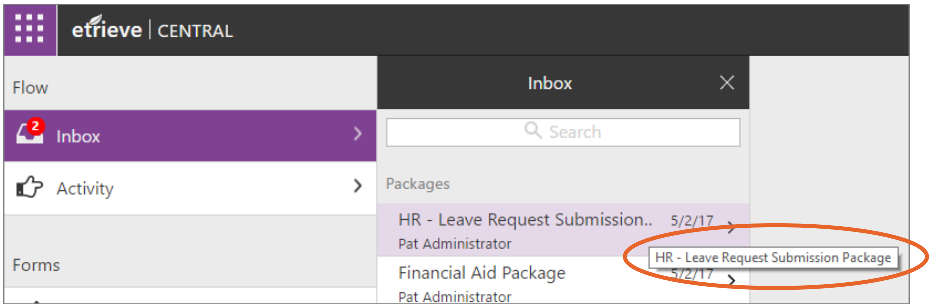


FIGURE 3.17 Central Inbox | Display of Packages

If Item Type Name is part of the naming options for the Package Name Rules, Accumulate will use the Workflow Name if Default is selected on Accumulate and a custom name is selected for the Package Name Rules. When Package Name Rules do not contain Item Type Name as part of the naming options when a customized name is set, Accumulate will use what is defined on Package Name Rules when the default option is selected for that step.

3.6.4 Privileges

Department users can manage the packages directly related to their department's workflows without being given Workflow Admin Privileges in Etrieve Security. In order to allow this access, the user must have the "Access Etrieve Flow" privilege and at least one Workflow must be selected to be managed—found in the Workflow Privileges section in Security. Additionally, a User or Role can also be granted access to manage a Workflow by going to the Privileges tab on the Workflow itself, but the "Access Etrieve Flow" privilege must still be granted to that User or Role. The permissions page of a Workflow with an assignment is shown in Figure 4.2 below.

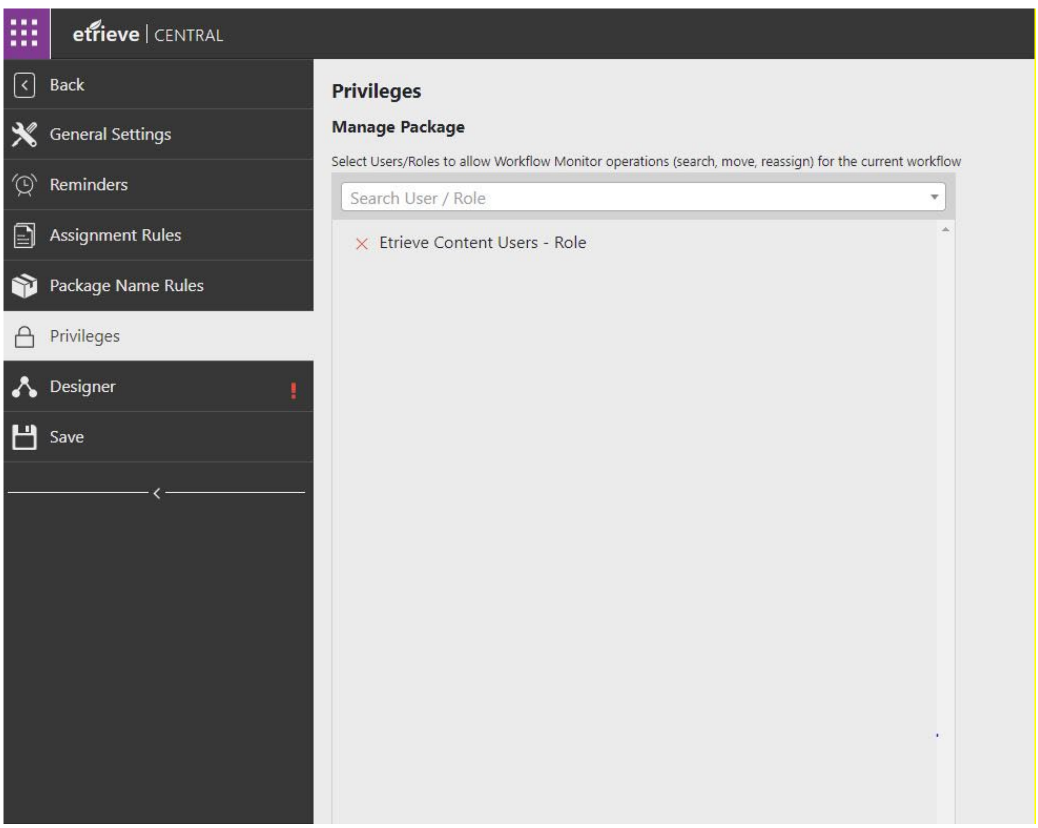


FIGURE 3.18 Workflow Privileges

4

Etrieve Workflow Monitor

4.1 Workflow Monitor

Once a workflow moves to production and becomes live, administrators have the ability to monitor the status of a workflow and adjust the current workflow's actor or move a workflow package to a different step in the process. This is useful in troubleshooting a stuck package, assisting when a team member is out of the office, or assisting with internal organization changes. Monitoring workflows is a feature available from the settings menu in Etrieve Central by selecting "Monitor" as illustrated below.

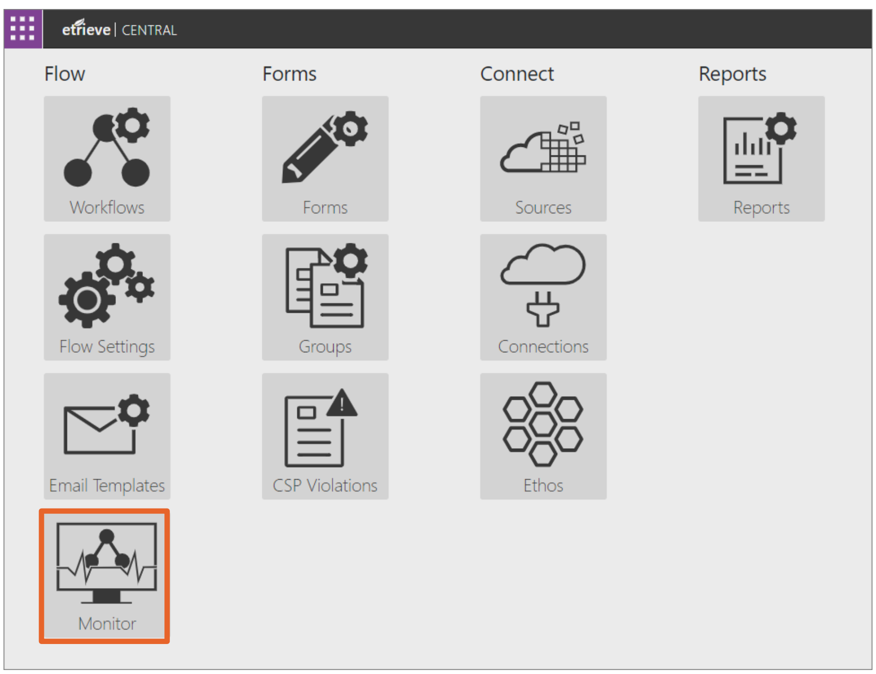


FIGURE 4.1 Etrieve Flow | Monitor

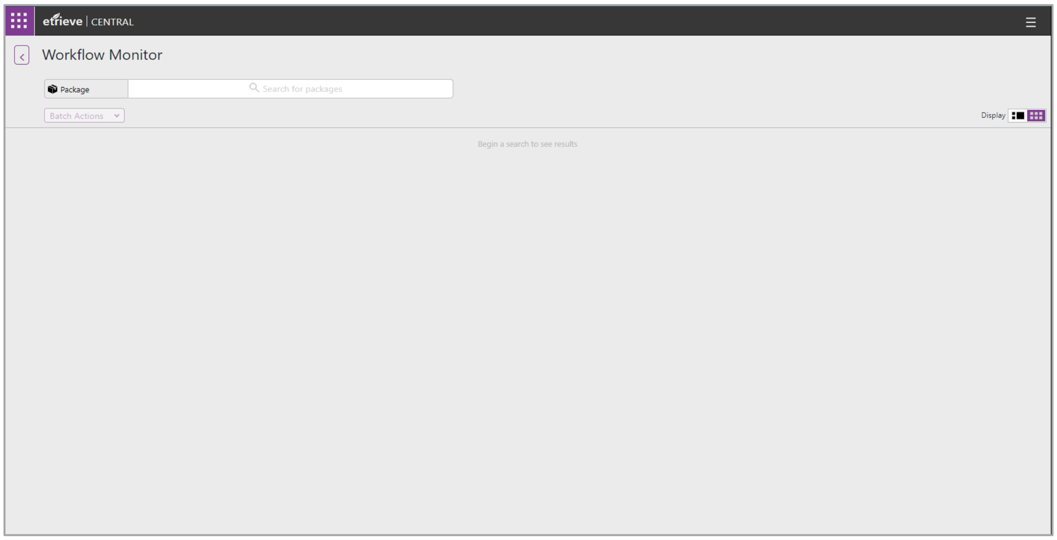


FIGURE 4.2 Workflow Monitor Page

4.2 Searching for a Package

When a user first enters the Monitor feature, no packages are listed, as seen in Figure 4.3. In order to find workflows, the user enters the name of the workflow into the search bar at the top of the page. The workflow must be ‘active’ to appear in the results. The results will appear as illustrated below in Figure 4.4.

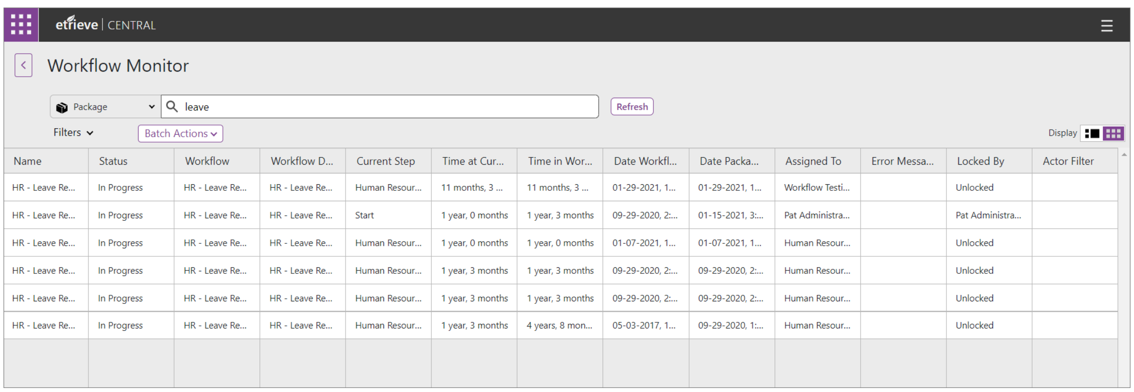


FIGURE 4.3 Monitoring Package Search Results

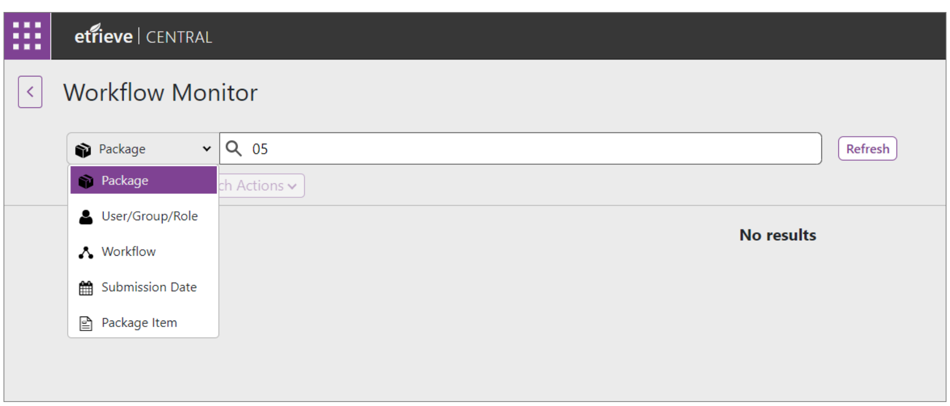


FIGURE 4.4 Search Field Options

As illustrated above, users can search by a variety of different fields, including:

- Package – searches for package name

- User/Group/Role – searches for user, group, or role name
- Workflow – searches for workflow name
- Submission Date – searches for the date the package was submitted
- Package Item – searches for package item name

4.3 Filtering Search Results

When searching for packages in the Monitor feature, there are a few filters that the user can utilize to further narrow the search results. The search drop-down can be found as seen in the following figure:

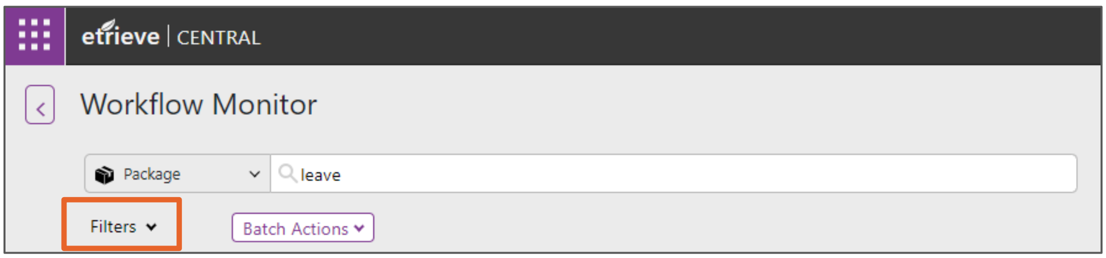


FIGURE 4.5 Filters Drop-down

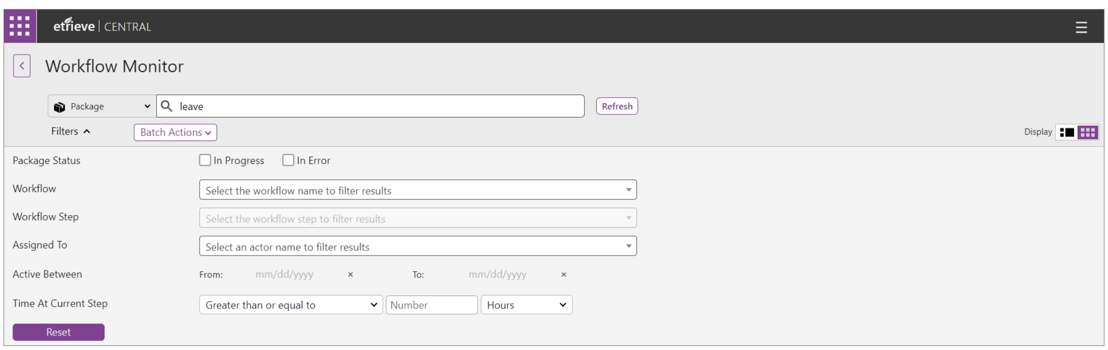


FIGURE 4.6 Filter Options

As shown above, users can filter by:

- Package Status - In Error and/or In Process packages
- Workflow Name - if the Search By option is not Workflow Name
- Workflow Step - available after Workflow Name is selected in the Filter options
- Assigned To - if the Search By option is not Assigned To
- Active Between – packages with activity between the two user-provided dates
- Time At Current Step – packages with a user-determined amount of time at their current step

4.4 Refreshing Search Results

Once a search has been conducted and results are displayed or no results have been found, the user has the ability to refresh the current search to return any updated information in the results list by clicking the Refresh button. Any filters previously utilized by the user remain in effect.

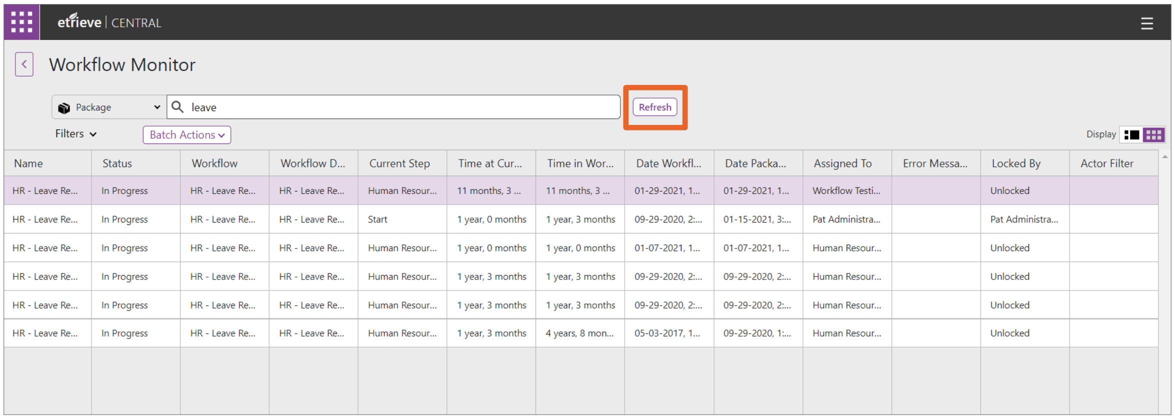


FIGURE 4.7 Workflow Monitor Refresh Button

Before a search has been conducted, and while a search request is in progress, the Refresh button is disabled.

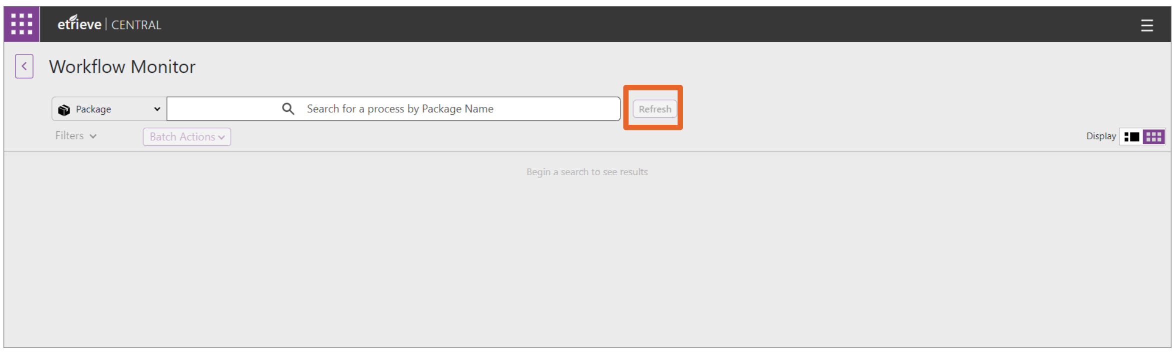


FIGURE 4.8 Workflow Monitor Refresh Button | Disabled

4.4 Search Results View

Searching a keyword will return a list displayed to the search area. The information on each workflow includes:

1. NAME | The name of the package.
2. STATUS | The current status of the workflow – In Progress / In Error.
3. WORKFLOW | The name of the workflow.
4. WORKFLOW DESCRIPTION | The description for the workflow.
5. CURRENT STEP | The current step at which the workflow is waiting.
6. TIME AT CURRENT STEP | The amount of time that the workflow has been at the current step in the flow.
7. TIME IN WORKFLOW | The amount of time that the workflow has been active for the package.
8. DATE WORKFLOW STARTED | The date at which the package's initial submission occurred and it entered the workflow.
9. DATE PACKAGE STARTED | The date at which the package was started.
10. ASSIGNED TO | The user that must take action before the workflow can proceed.
11. ERROR MESSAGES | Any error messages if the workflow is in "In Error" status.
12. LOCKED BY | If the workflow is locked by any user, the user's name appears here. If the workflow is not locked, the section will instead read "Unlocked".

As illustrated below, the user clicks on an individual row in the page, and a preview with further details and actions appears at the bottom of the page. The additional information also shows a preview of the workflow and an overview of any items attached in the package.

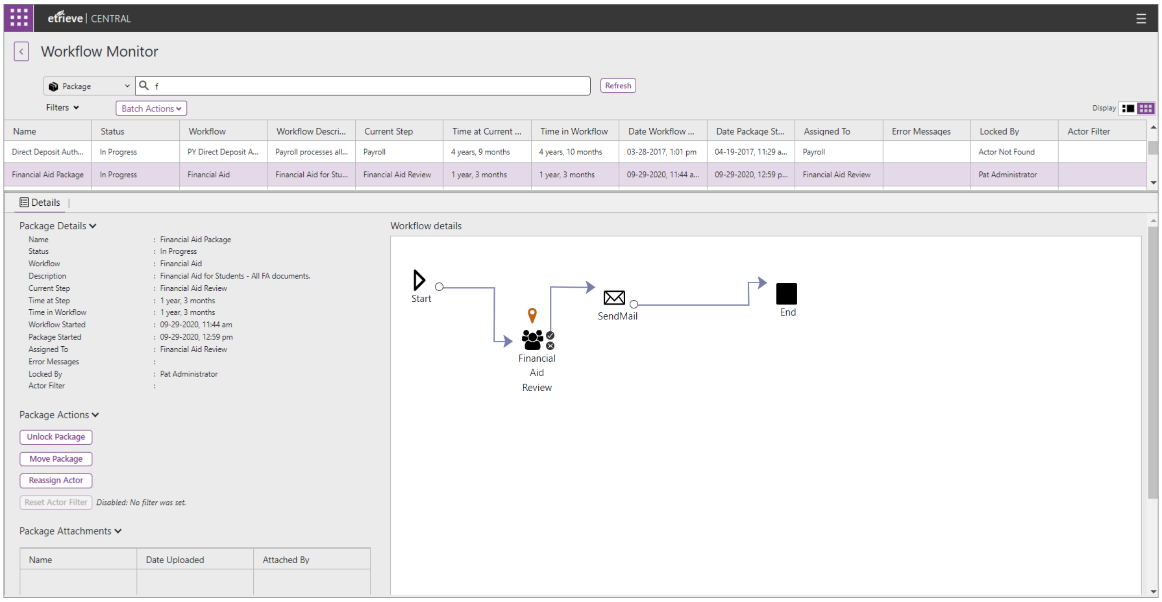


FIGURE 4.9 Monitor Package Detail View

The user can change the way that search results are displayed on this page so that the list appears on the left side of the page and the preview appears on the right. To access the alternate view, select the toggle display icon. This alternate view can be seen in the following figure.

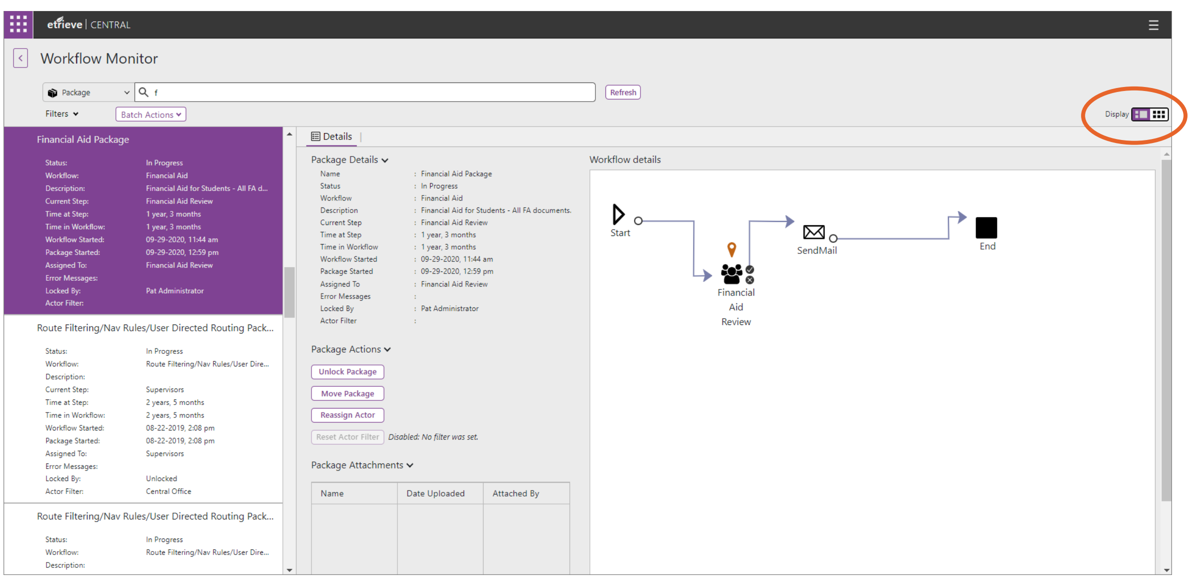


FIGURE 4.10 Monitor Package Detail Alternate View

4.5 Individual Actions in Package Details

In the section of the page containing the details for the selected package, users can select the following actions:

1 UNLOCK PACKAGE | This action allows the Workflow Administrator to unlock packages that have been locked by users.

When selected, a message will appear to let the user know the Unlock was successful. When a package is not locked by a user or it is on a non-actor step, the Unlock Package button will be disabled.

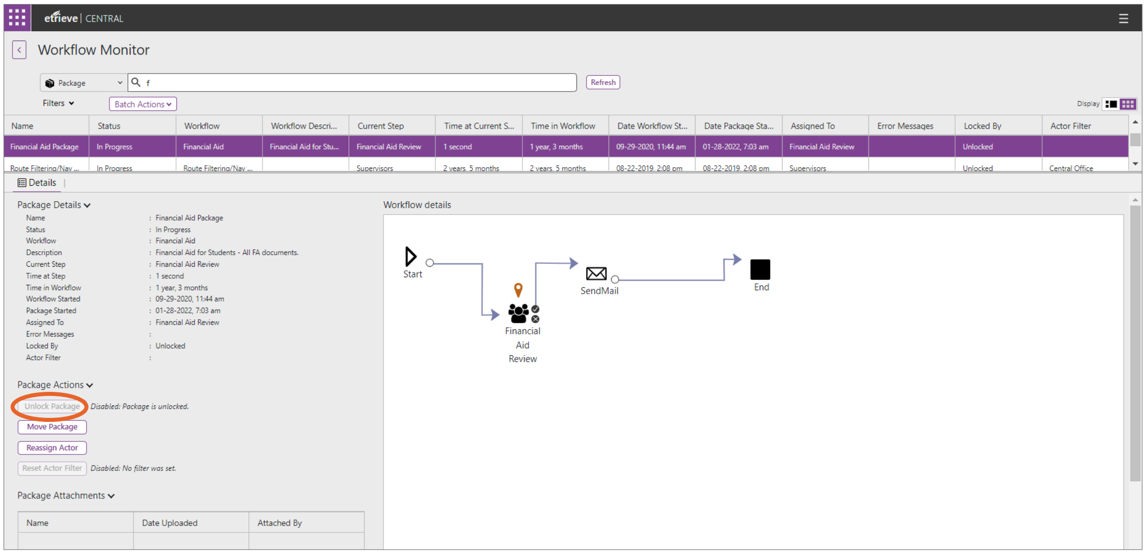


FIGURE 4.11 Unlock Package | Disabled

2 MOVE PACKAGE | This action allows the user to change which step that the workflow for the selected package is currently in. Only unlocked packages may be moved.

When selected, the user is prompted to input the step to move the package and indicate a reason for moving the package. The information that must be filled out includes a selection of which step in the appropriate workflow to move the package to and a reason for the move. Then, the user selects “Move” and the package is moved to the selected step.

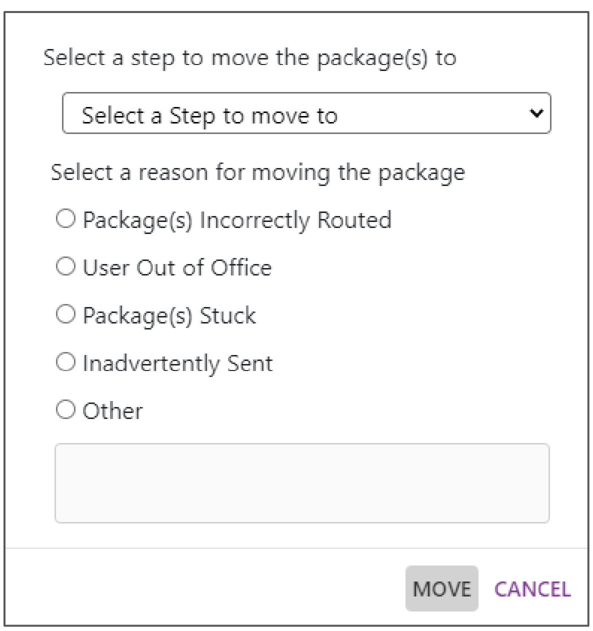


FIGURE 4.12 Move Package Action Overlay

If the package selected has a flow with a step UDR (User Direct Routing) Drilldown enabled, the Workflow Monitor will be able to detect if the user is moving the package to that step. When this occurs, the "Move" action will display a toggle to allow the Administrator the ability to assign the package directly to the Group/Role step based on the step or select from the list of Users within the UDR list based on the Group/Role step when the Drilldown is enabled.

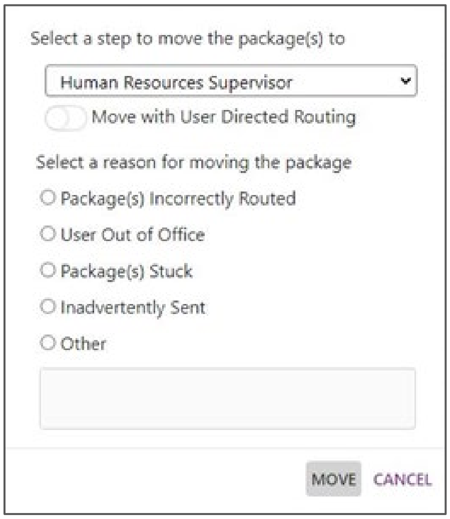


FIGURE 4.13 Move Package action with User Directed Routing (unselected)

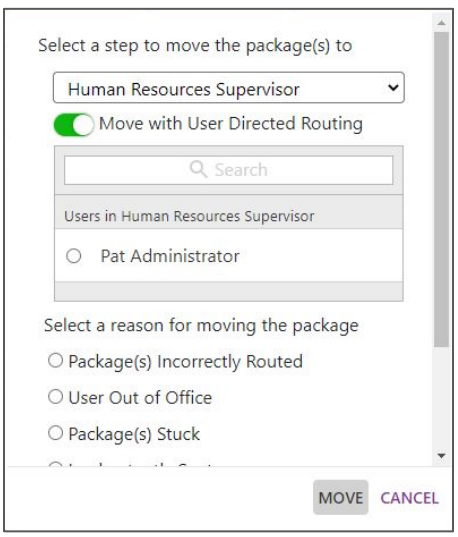


FIGURE 4.14 Move Package action with User Directed Routing (selected)

If the package selected is within a workflow that has an E-Sign step, then validations will occur to ensure the form has all information needed to move the package as well as update particular form fields based where the package is moved. The following are some validations and behaviors which will occur when a E-Sign package is moved:

- E-sign package cannot be moved to an E-Sign step if the field which houses the email address does not have a valid email address. When this occurs, the package can be moved backwards in the workflow to a non-E-Sign actor step, Start Step or use Reassign to allow the email address field to be updated on the form.
- When an E-Sign package is moved to or prior to an E-Sign step in the workflow, all fields used to capture signatures for subsequent steps E-Sign steps will be cleared to allow new signatures to be obtained.
- When an E-Sign package is moved to or after an E-Sign step, then only the fields used signatures at that current E-Sign step will be cleared.
- Any prior links that were sent to the Signer Recipient will be invalid after the package has been moved.

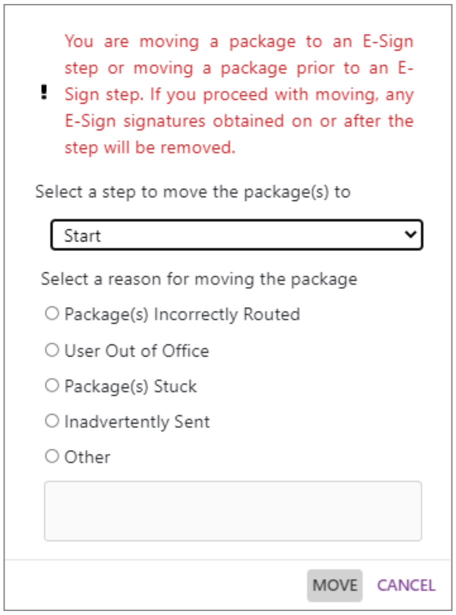


FIGURE 4.15 Warning message displayed when moving an E-Sign package

3 REASSIGN ACTOR | This action allows the user to reassign the package to another user to complete the action needed for the current workflow step.

When selected, the user will be prompted to select a User/Group/Role to assign the package and indicate a reason for the package move. This information must be completed before reassignment can occur. Then, the user selects the "Reassign" button and the package is reassigned.

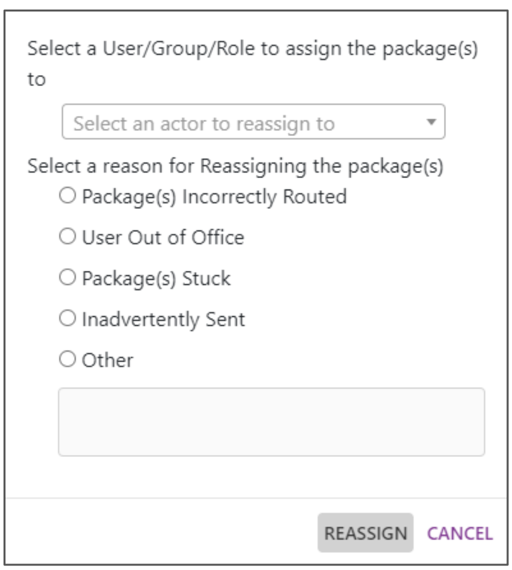


FIGURE 4.16 Reassign Actor Action Overlay

When reassigning a package which resides on an E-Sign step, Workflow Monitor will allow the administrator to type in an email address for the package. This will be used to send the form to the Signer Recipient designated by that email address and update the package history. Any links to the form in the email sent to the prior Signer Recipient for this E-

Sign step will be invalid after reassigning. A warning will display if the email address entered is not valid (does not follow a standard email structure).

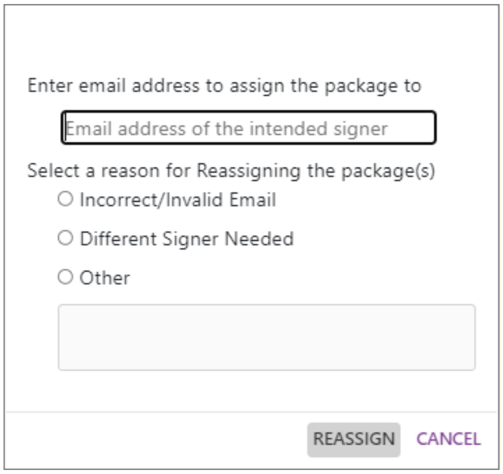


FIGURE 4.17 Reassigning to E-Sign Signer Recipient

4 RESET ACTOR FILTER | There is an individual action that a user can take on a package that has an Actor Filter. When selecting the "Reset Actor Filter," a user is allowed to change an incorrect actor filter. The user will be prompted to provide which filter to which to reset the filter, and a reason for the reset. If no actor filter was set in the Workflow, then the Reset Actor Filter button will be deactivated, and the user will not be able to select it as an action.

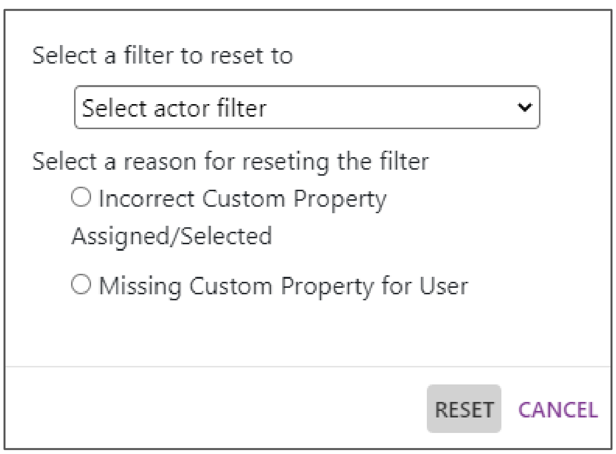


FIGURE 4.18 Reset Actor Filter Overlay

5 INACTIVE WORKFLOW ACTIONS | When a Workflow is in an inactive status, individual actions such as reassigning and moving can still be performed.

4.6 Batch Actions

At the top of the page, above search results, there is a dropdown menu that allows users to reassign multiple workflows at once. When the user selects the dropdown, they will be prompted by checkboxes to select which packages to reassign.

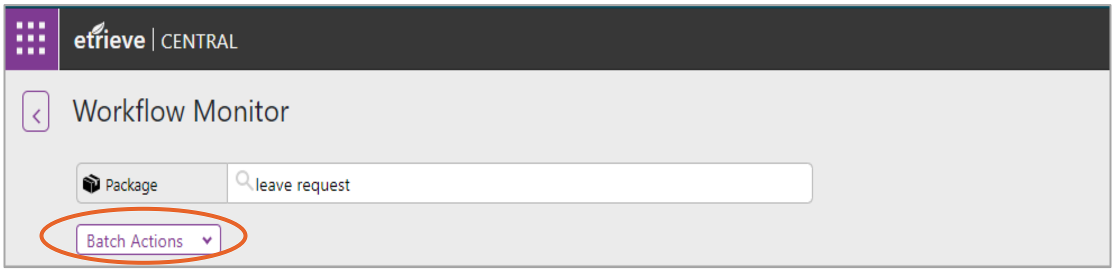


FIGURE 4.19 Batch Actions Dropdown

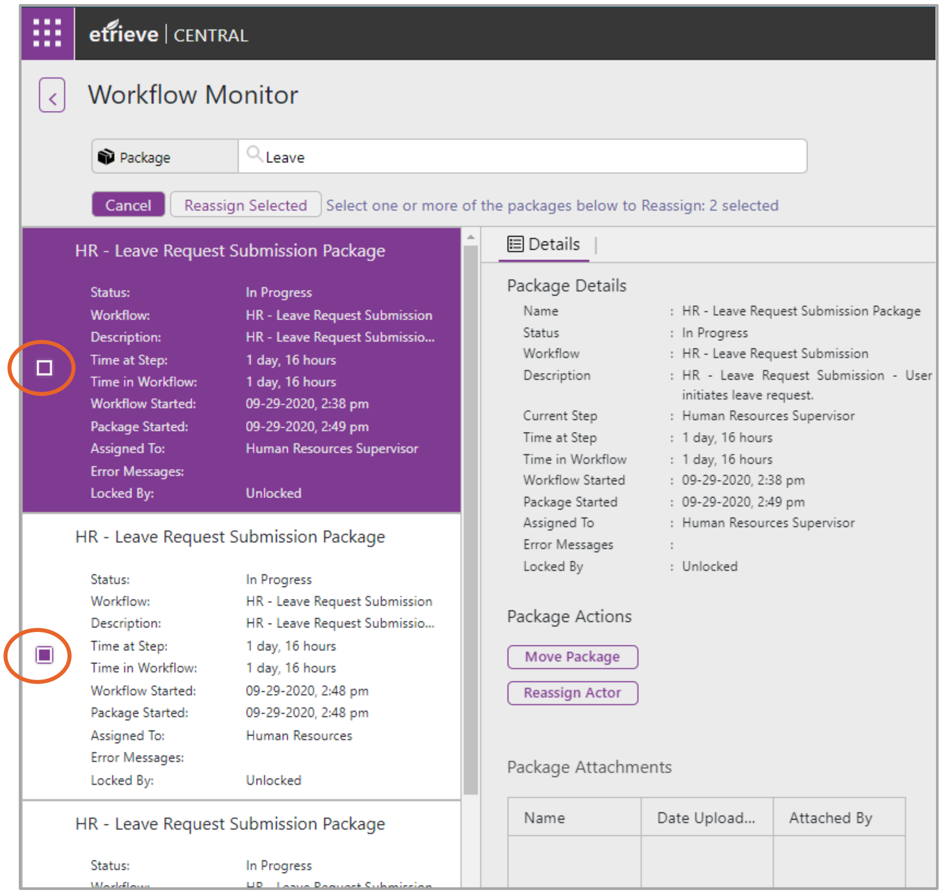


FIGURE 4.20 Batch Actions Multiple Package Selection

Then, the user selects “Reassign Selected” and they will be prompted to choose which user to reassign the packages to and the reason for the reassignment. The available reasons include:

- Package(s) Incorrectly Routed
- User Out of Office
- Package(s) Stuck
- Inadvertently Sent
- Other – a textbox to explain the reason for reassignment

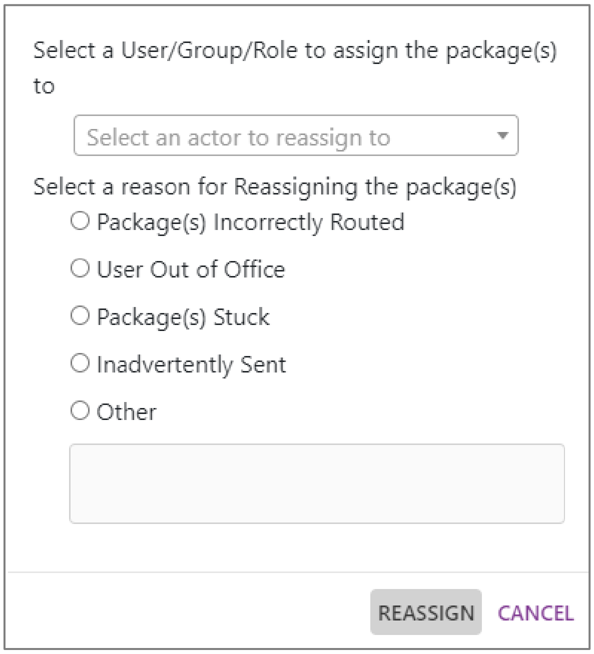


FIGURE 4.21 Batch Action Reassignment Overlay

When the user then selects “Reassign,” the selected packages will be reassigned to the selected actor. During reassignment, there will be an indication of the Users or Groups that are not included in the User or Group permissions assigned to the current Step. This indicator provides a way to identify the newly assigned users or groups that fall outside of the user/group permissions based on permissions configured for the workflow step.

By utilizing the filtering feature of the search results, users will find that it is possible to move one or more packages—through the use of batch actions—from the list of results within a single workflow to a different step of the same workflow.

When moving a package to a Group step which has UDR with drill-down enabled, moving the package will reassign the package to the Group; this is the only circumstance in which moving a package will reassign the package outside of the step’s execution rules. In all other cases, the step’s execution rules will occur when moving the package.

Moving a split package will locate split packages, delete them, and create a new one for the step to which the package has been moved.

There are limitations to the ability for users to move a single package or multiple packages. The “move” action cannot occur if the current step of the package does not have an Actor. Additionally, users cannot move a Content document to a Start Step. Packages with multiple, different originators who have submitted documents separately cannot be moved. Finally, packages cannot be moved if their workflow is inactive.

5

Etrieve Email Templates

5.1 Email Templates

Email Templates allow Central Administrators to create, modify, and delete custom email templates that integrate into Workflow notifications.

Email Templates is a feature available from the settings menu in Etrieve Central by selecting "Email Templates" as illustrated below.

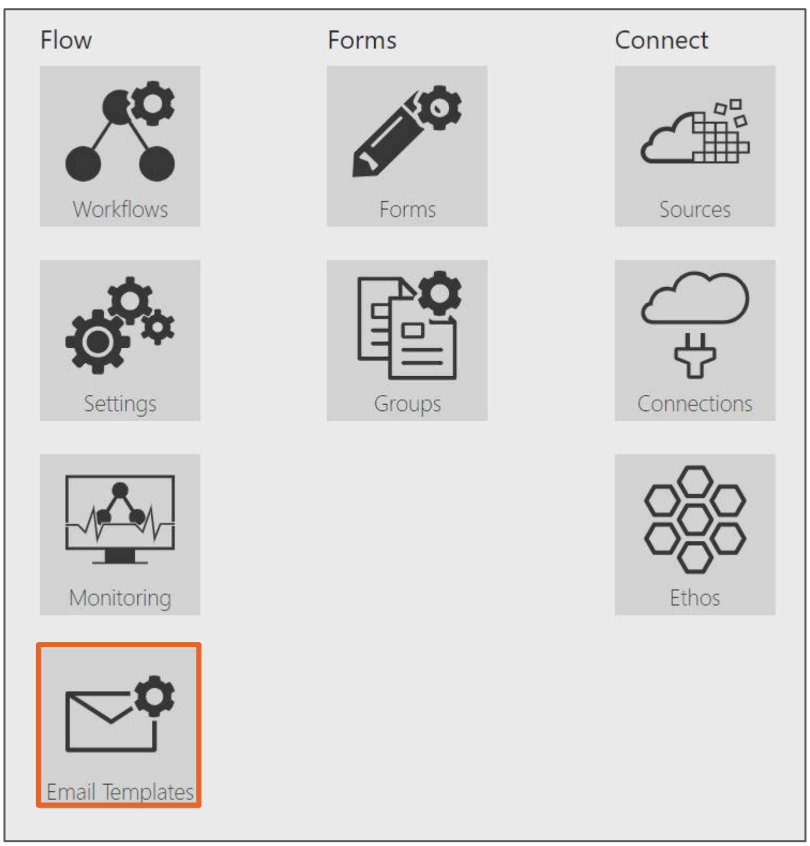


FIGURE 5.1 Email Template menu item

The page for Email Templates appears as shown below, with a list of all the currently created email templates organized by name.

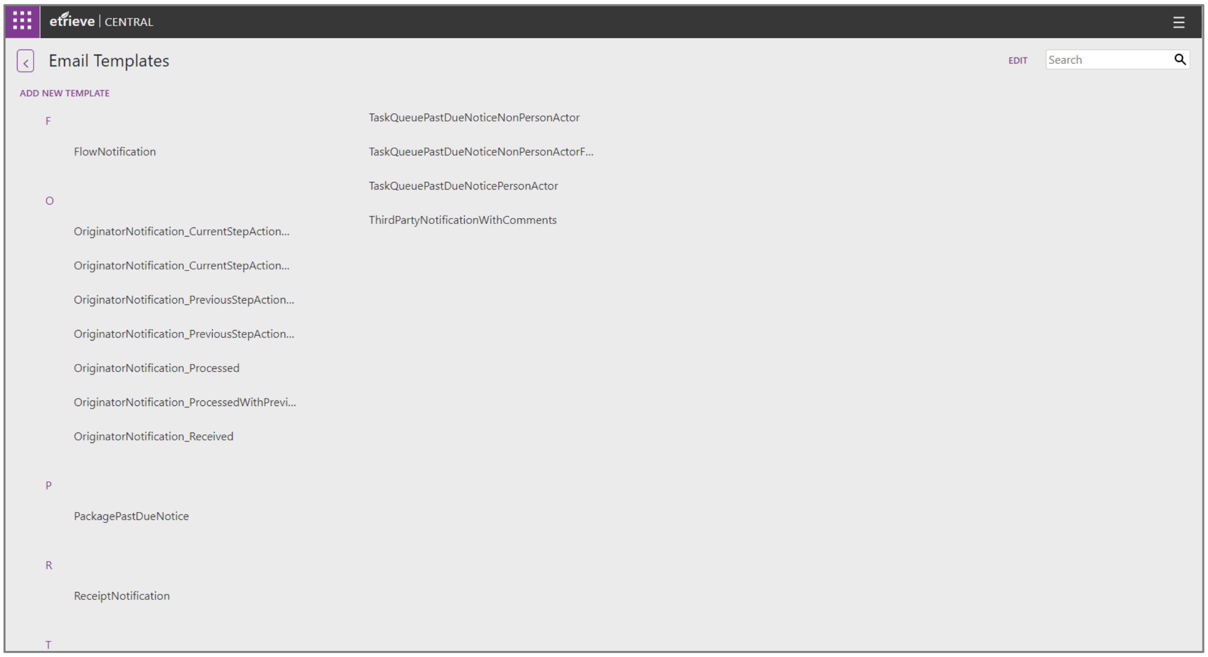


FIGURE 5.2 Email Template Main Menu

5.2 Adding and Editing an Email Template

A new Email Template can be added by selecting "Add New Template" from the Email Template page.

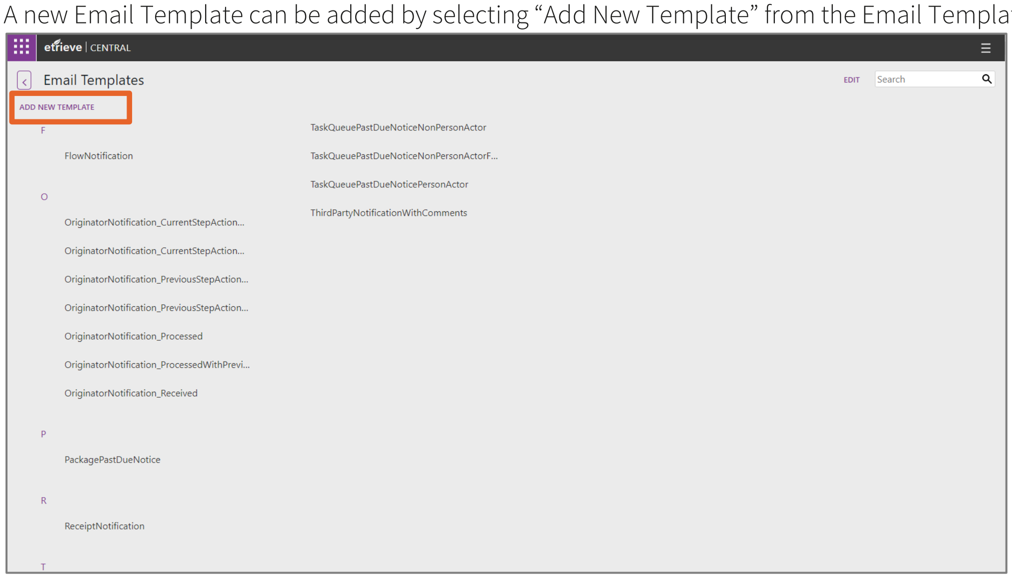


FIGURE 5.3 Email Template Add New Template button

Once selected, the administrator will navigate to a new page with the General Settings for the new template.

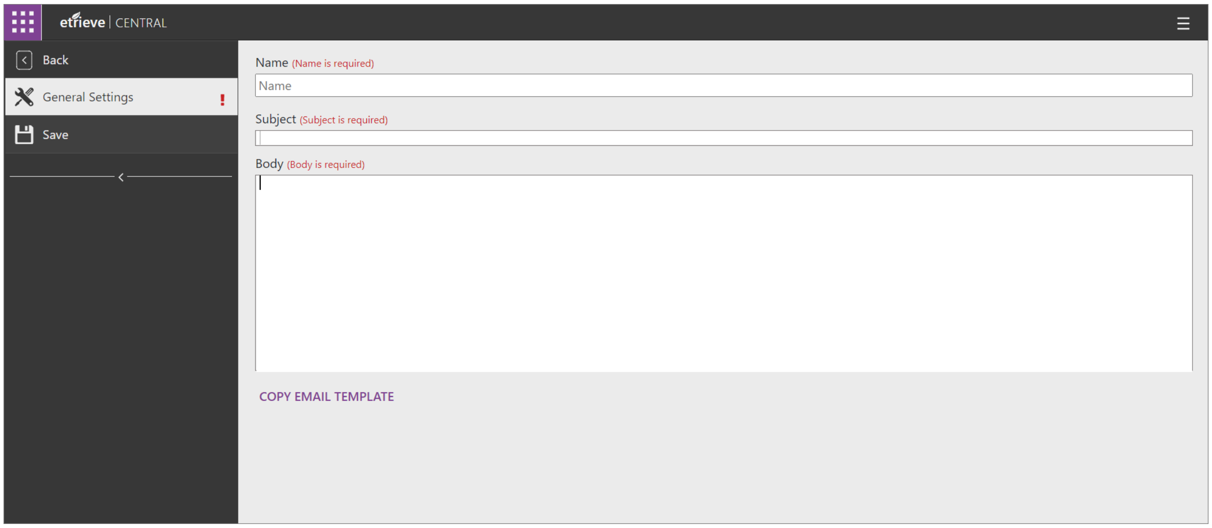


FIGURE 5.4 Email Template "Add New Template" General Settings page

Under "General Settings," the administrator will be required to fill out three sections: Name, Subject, and Body. When finished, the administrator can select "Save" from the left-side panel and the template will be saved to available templates.

Otherwise, once the administrator fills out the required fields, he or she can also select "Copy" from the General Settings page to create a duplicate of the email template, which will simply make a duplicate and automatically save it without the option to edit it first, leaving the original template open. All templates must have unique names. To edit the copy created, the user must close the original template and open the newly created template.

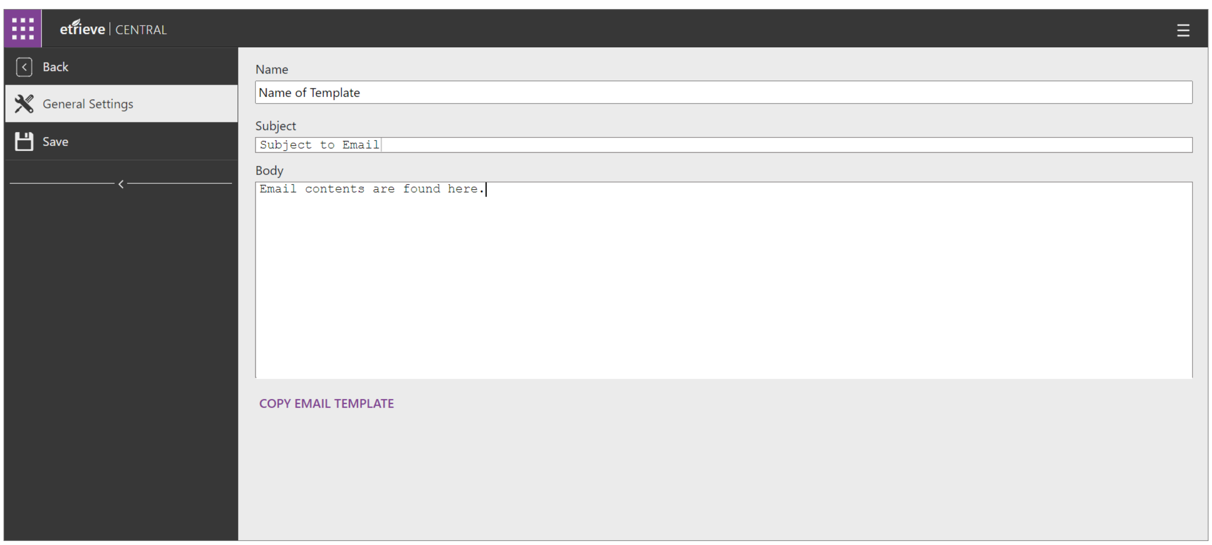


FIGURE 5.5 Email Template Copy selection

If the administrator does not save the template before selecting "Copy" a warning notification will appear to ask whether or not to discard the changes made to the current template.

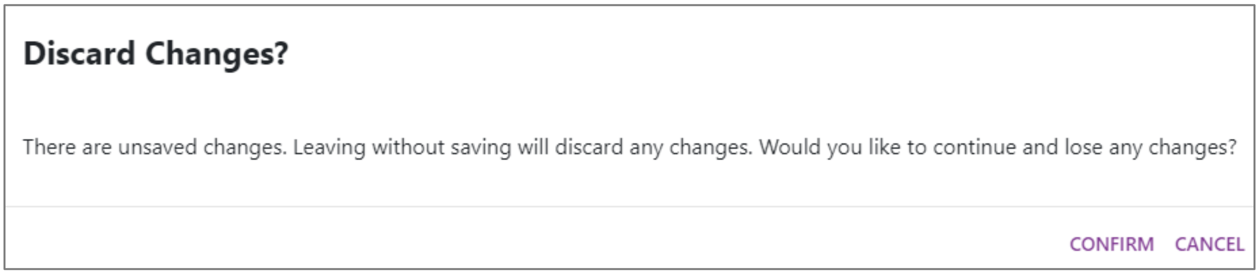


FIGURE 5.6 Email Template Copy unsaved changes warning

In order to edit a template, a user must simply select the name of the template from the Email Template landing page. The page to edit a template is identical to the page for adding a template—simply fill out the information and select "Save."

5.3 Email Template Keys

When creating or editing an email template, the administrator may want to utilize Email Template Keys to display variable data that will be taken from the workflow where the email template is used. Users can select 'SHOW KEYS' in the bottom right corner of the edit/add email template page to see a list of available keys. Selecting on an Email Template Key copies it to the clipboard for convenient pasting into the email body.

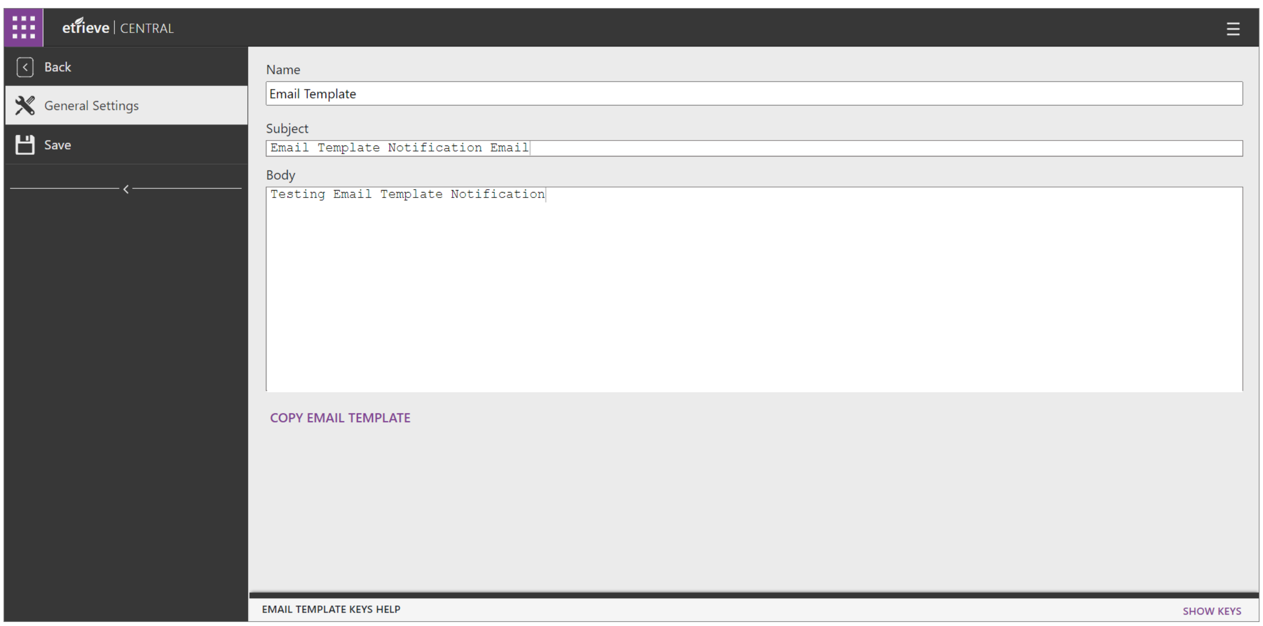


FIGURE 5.7 Email Template Keys

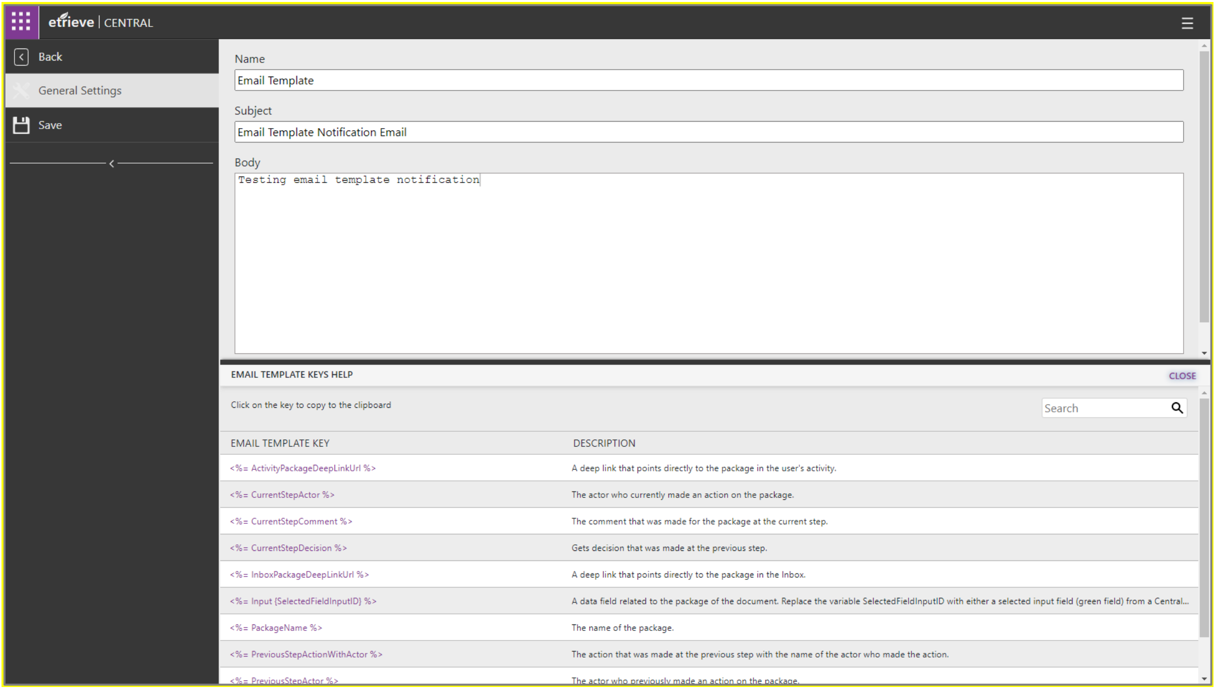


FIGURE 5.8 Email Template Key Selection

Email template keys can be filtered/searched by utilizing the search bar in the upper right-hand corner of the Email Template Keys Help section.

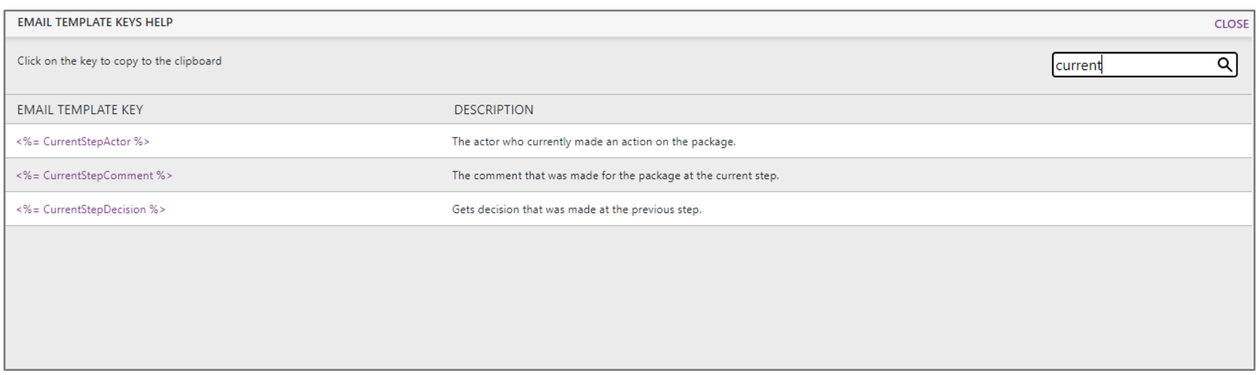


FIGURE 5.9 Email Template and searching for Template Keys

Additionally, input data coming from Forms or Documents that have been integrated in a workflow can also be added as part of the email body. Use the following key to insert an input:

<%= Input {SelectedFieldInputID} %>

The user must replace "SelectFieldInputID" with the input ID that should be displayed in the email body.
Note: Be aware that the input fields on the email body must match the input fields integrated in the workflow where the template is used to send a step notification.

Email template keys which produce a link are used to provide a URL to the form within the email body. For example, the "<%= Esign %>" email template key will produce a URL for a Signer Recipient who does not have an internal account in order for that person to sign a form.

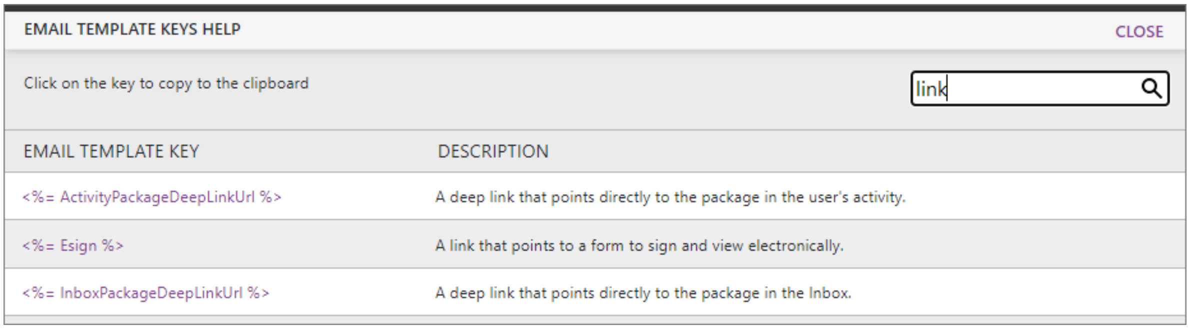


FIGURE 5.10 Email Template Keys Help

The data keys are displayed with a different color in the email body to highlight and differentiate them from the regular text. If a data key is not display with a different color, the key syntax might be wrong. Data keys start with '<%=' and end with '%>'.

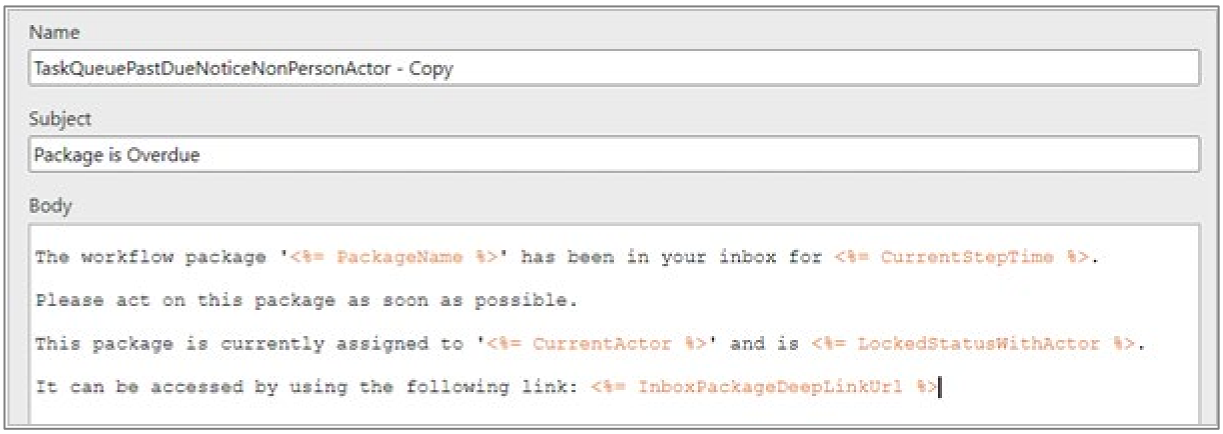


FIGURE 5.11 Email Template Example with Data Keys

5.4 Delete an Email Template

In order to delete an email template, the administrator must first navigate to the list of email templates. Then, selecting "Edit" in the upper right-hand corner of the page (next to the Search) will produce checkboxes next to each template. The administrator can then select the templates that need to be deleted and select "Delete" in the upper right-hand corner of the page. A confirmation message will appear asking the user to confirm the deletion(s).

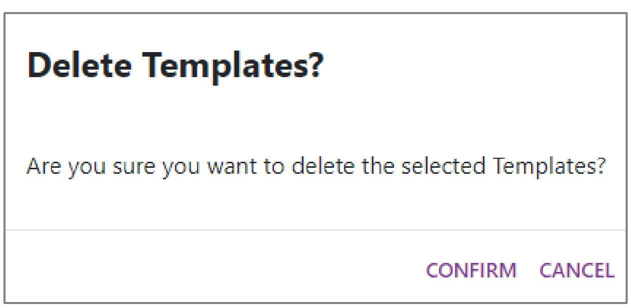


FIGURE 5.12 Delete Email Template warning

In order to exit "Edit" mode, simply select "Cancel" on the top right-hand corner of the page.

NOTE | Email templates that are used in a workflow notification and default templates for E-Sign cannot be deleted. An error message will be displayed when a template delete action cannot be completed successfully due to the reference restriction.

5.5 Using Email Template in Notify Setting

Inside a workflow, in the Workflow Designer, the administrator can select which Email Template to use for which type of notification recipient. Each of these notifications can be disabled as needed. All the template dropdowns contain both the corresponding base email template and custom email templates created by you.

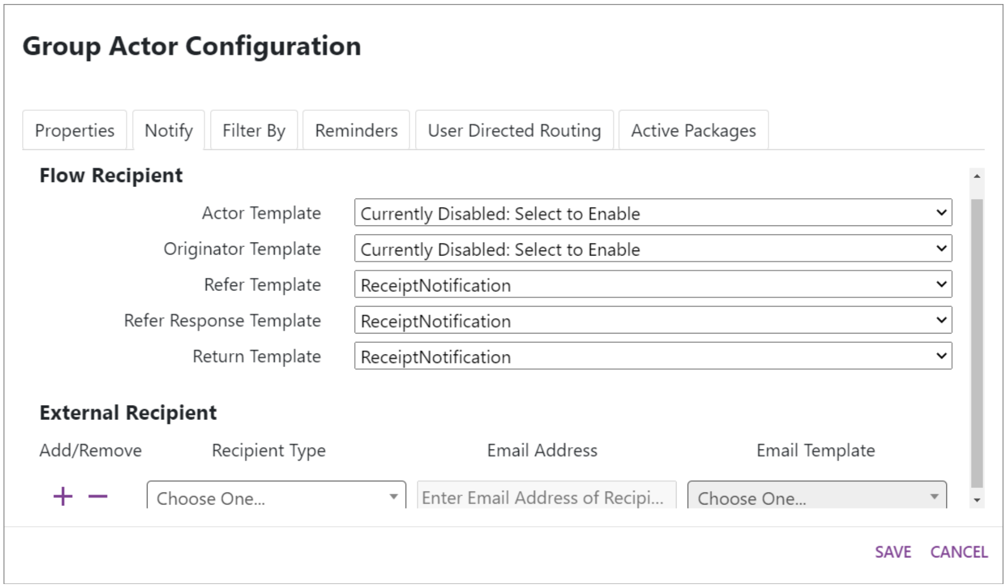


FIGURE 5.13 Group Actor Configuration with option to select Email Templates

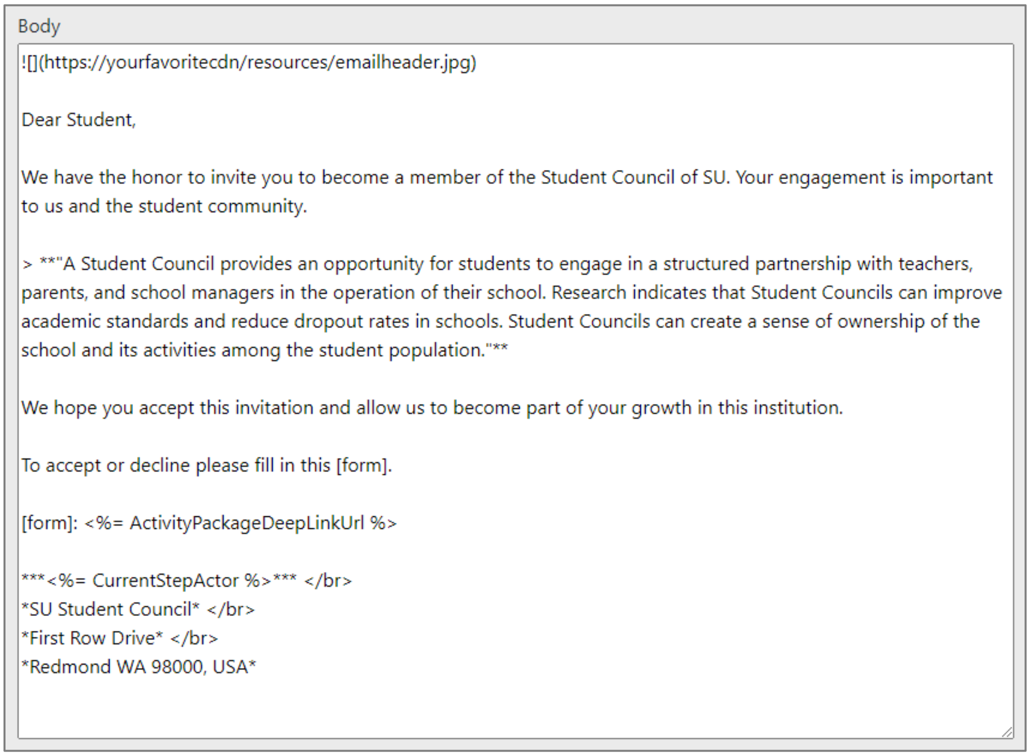
5.6 Markdown Language in Email Body

The email template's body supports basic markdown syntax to enhance the notifications sent by the flow steps. Some of the supported markdown features are listed below:

Markdown		Example
1	Set html headings by using # before a text # heading level 1 ## heading level 2 ### heading level 3 #### heading level 4	#Important Email Important Email
2	Make the text bold by adding two asterisks before and after the text you want to bold **Text**	In this line this is my **bold text** In this line this is my **bold text**
3	Make the text italic by adding an asterisk before and after the text you want to make it italic *Text*	In this line this is my *italic text* In this line this is my *italic text* In this line this is my ***bold italic text*** In this line this is my ***bold italic text***
4	To create a blockquote, add a > in front of the paragraph. > Paragraph	This is a blockquote line This is a blockquote line
5	Display an image using the following syntax !\[image description, it is optional](image URL) We recommend you have the images available for public access from a Content management system or web site.	!\[](https://yourfavoritecdn/resources/emailheader.jpg) The image will be rendered in the email, see example in the Figure 10 Email created using markdown

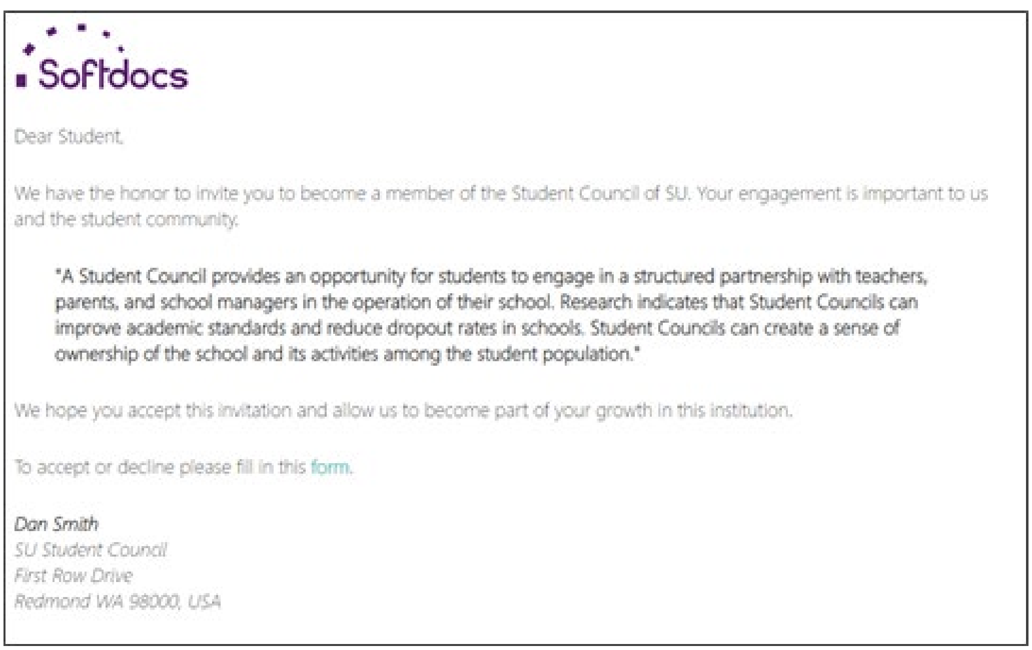
5. 7 Email Template Example with Markdown and Keys

The following images show how email template keys and markdown syntax can be utilized to customize email customizations for the notifications.



```
Body
![](https://yourfavoritecdn/resources/emailheader.jpg)

Dear Student,

We have the honor to invite you to become a member of the Student Council of SU. Your engagement is important
to us and the student community.

> **"A Student Council provides an opportunity for students to engage in a structured partnership with teachers,
parents, and school managers in the operation of their school. Research indicates that Student Councils can improve
academic standards and reduce dropout rates in schools. Student Councils can create a sense of ownership of the
school and its activities among the student population."**

We hope you accept this invitation and allow us to become part of your growth in this institution.

To accept or decline please fill in this [form].

[form]: <%= ActivityPackageDeepLinkUrl %>

***<%= CurrentStepActor %>*** </br>
*SU Student Council* </br>
*First Row Drive* </br>
*Redmond WA 98000, USA*
```

FIGURE 5.14 Email Template Example with Markdown and Template Keys



Dear Student,

We have the honor to invite you to become a member of the Student Council of SU. Your engagement is important to us and the student community.

> **"A Student Council provides an opportunity for students to engage in a structured partnership with teachers, parents, and school managers in the operation of their school. Research indicates that Student Councils can improve academic standards and reduce dropout rates in schools. Student Councils can create a sense of ownership of the school and its activities among the student population."**

We hope you accept this invitation and allow us to become part of your growth in this institution.

To accept or decline please fill in this form.

Dan Smith
SU Student Council
First Row Drive
Redmond WA 98000, USA

FIGURE 5.15 Result of Email Template with Markdown and Template Keys

5. 8 Unique Notification Subject Lines Using Email Template Keys

IMPORTANT TO NOTE: There are instances where emails may be grouped together when the conversation view setting is turned on within your email service provider.

Emails are grouped if each message meets the following criteria:

- The same recipients, senders, or subject as a previous message
- A reference header with the same IDs as a previous message
- Sent within one week of a previous message

To prevent grouped emails:

- Create a new subject for each message that you don’t want to group.
- Send each message with a unique reference header value that doesn’t match a previous message.

6

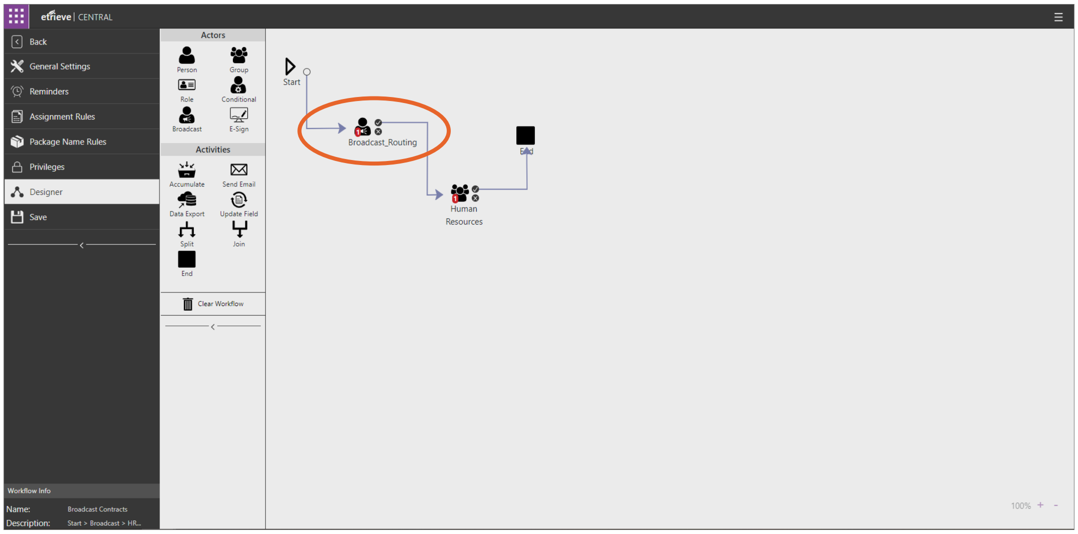
Etrieve Flow Sample Workflows

6.1 Sample Workflows

The following chapter of this manual will provide Sample Workflows that will provide users with a point of reference as well as illustrations of Workflows to help guide users designing your institution's Workflows.

6.1.1 Broadcast Actor

The Broadcast Actor was configured in this Workflow scenario to route Contracts to a group of people. Once the contract has been completed, the contract will then be routed to Human Resources. The Human Resources step in the illustration below has been configured using a Group Actor. When setting up a Broadcast Actor in a Workflow, this actor configuration must be the first step configured following the start of the Workflow.



TIP: The Badge number displayed over the Workflow step indicates the number of active packages that are in the Workflow step. (User's Central Inbox for action)

FIGURE 6.1 Workflow Designer | Broadcast Contracts

1 Broadcast Actor Configuration

BROADCAST ACTOR | A broadcast actor typically allows the representation of steps so that broadcast routing can occur at the first step of a Workflow. Broadcast routing can be incorporated into a business flow which enables the Broadcast & Preview actions for the originator & the Approve & Denies for the recipients of the broadcasted form. Senders of broadcast forms commonly use this actor in Workflows that manage Contracts and Policy Changes. This will result in fewer users to filter from, fewer irrelevant filters to manage, and the pre-population of data that is automatically available.

PROPERTIES TAB | The Properties tab for the Broadcast Actor Configuration allows the user to modify the properties for the broadcast actor step. The Enable Refer button can be toggled to enable or disable the option to refer the document to other users at this step in the workflow. The Enable Return to Previous button can also be toggled to enable or disable the option to return the document to the previous actor in the workflow. The Location (x, y) fields provide the exact coordinate points on the Workflow Designer Configuration Area where the step is located.

The Packages in Error field indicates any routing errors that need to be resolved.

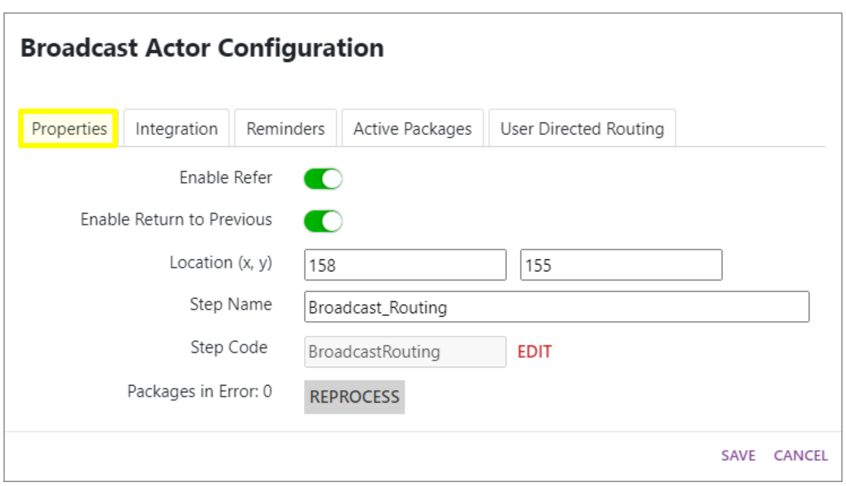


FIGURE 6.2 Workflow Designer | Broadcast Actor Configuration | Properties Tab

INTEGRATION TAB | The Integration tab is where the integration source will be configured. The source must be created before the integration mapping can be configured. The Person ID must be 'Email' on all broadcast routing configurations.

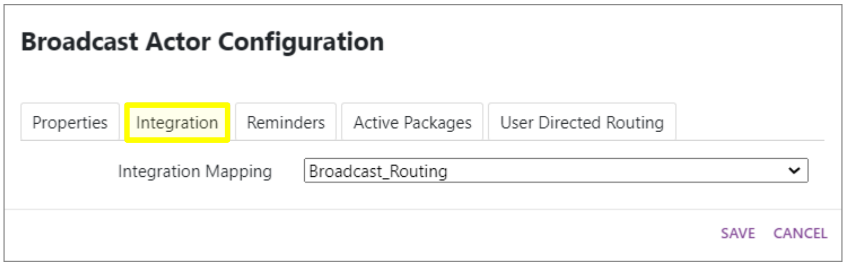


FIGURE 6.3 Workflow Designer | Broadcast Actor Configuration | Integration Tab

REMINDERS TAB | The Reminders tab contains a setting called "Enable Reminder Notifications" that is a toggle switch to turn on/off reminders at this step. If reminders are set to Off, any pending Reminder Notifications that are supposed to be sent out for the step will not go out. However, when Enabled, pending Reminder Notifications for the step will be checked again at the top of the hour, like usual, and if any of the notification dates have passed the current date and time then notification emails will be generated and sent out.

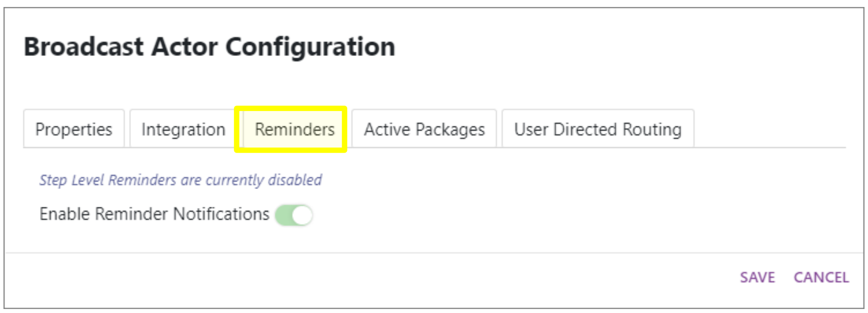


FIGURE 6.4 Workflow Designer | Broadcast Actor Configuration | Reminders Tab

ACTIVE PACKAGES TAB | The Active Packages tab displays all of the Active Packages for the Workflow step. A user can search for a specific package by typing in the Search bar or by selecting the Filter By drop-down selection. The filter can be applied to search for All, Locked and Unlocked packages.

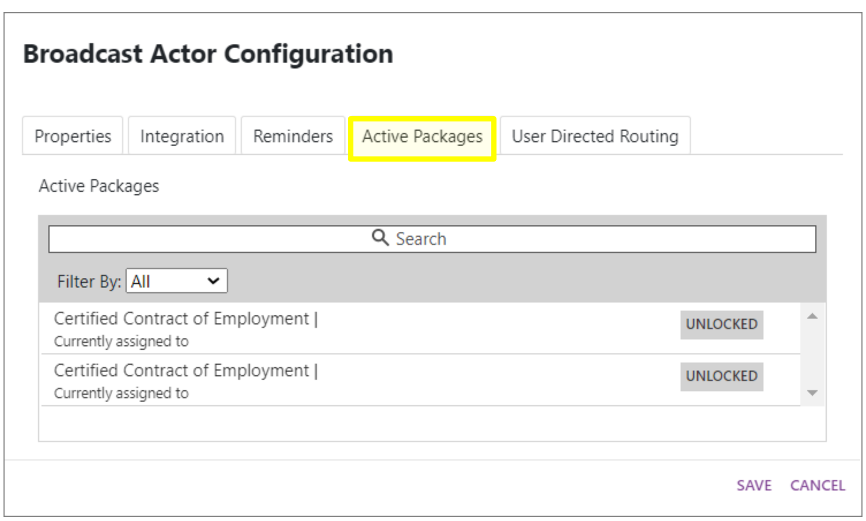


FIGURE 6.5 Workflow Designer | Broadcast Actor Configuration | Active Packages Tab

USER DIRECTED ROUTING TAB | The User Directed Routing tab is located in the Broadcast Actor settings. This enables Users to specify which users within a group should receive a package rather than routing to an entire group. It is configured on the actor that will be choosing the recipient. Any group that the actor is connected to can be selected for User Directed Routing. This workflow example does not utilize this feature.

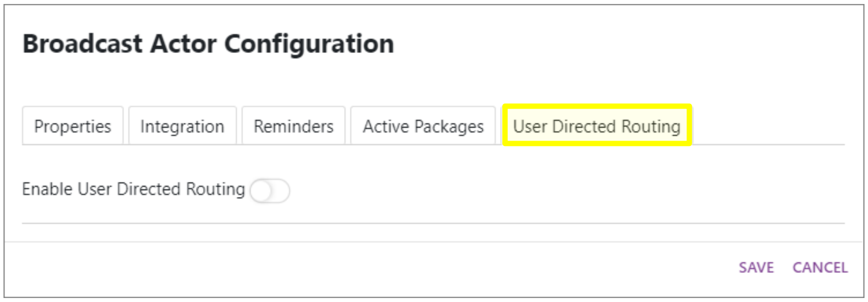


FIGURE 6.6 Workflow Designer | Broadcast Actor Configuration | User Directed Routing

2 Group Actor Configuration

GROUP | All users who are members of the chosen group will receive the package in their Etrieve Central Inbox.

PROPERTIES TAB | The Properties tab for the Group Actor Configuration allows the user to modify the properties for the group actor step. The Enforce Package Review button can be toggled in order to require any actors at this step to perform a package review before the workflow can proceed. The Enable Refer button can be toggled to enable or disable the option to refer the document to other users at this step in the workflow. The Enable Return to Previous button can also be toggled to enable or disable the option to return the document to the previous actor in the workflow. The Location (x, y) fields provide the exact coordinate points on the Workflow Designer Configuration Area where the step is located.

The Packages in Error field indicates any routing errors that need to be resolved.

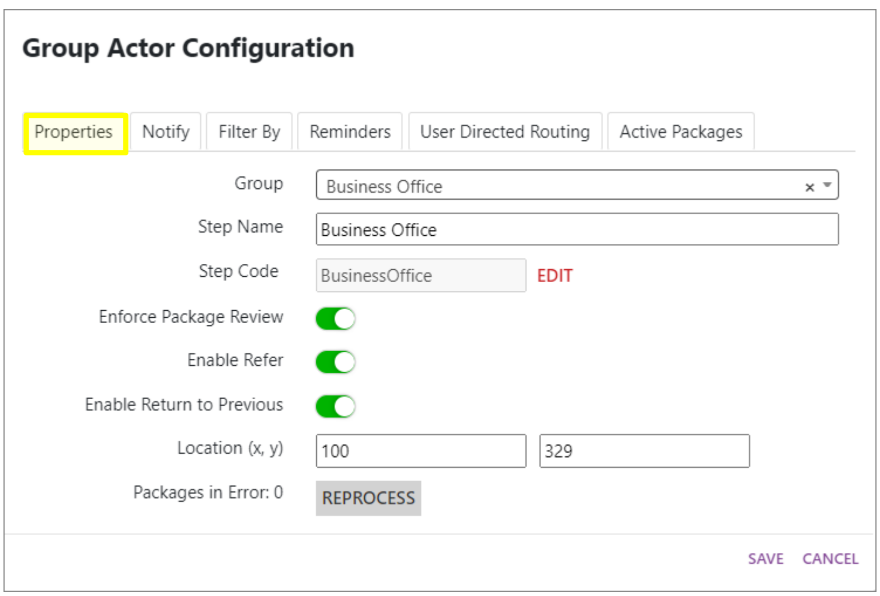


FIGURE 6.7 Workflow Designer | Group Actor Configuration | Properties Tab

NOTIFY TAB | The Notify tab provides the ability for to configure the templates for each type of notify recipient. This feature can be enabled or disabled by choosing the email template from the dropdown. If no email template is chosen, that notification will be disabled. You can specify a template for the actor, originator, refer, refer & return response for each individual actor.

The Originator Email Template provides a notification email to be sent to the originator if necessary. When a user originates a form, the email notifications the user receives will include a link to the workflow package.

An external/dynamic email recipient can be configured. When configuring a external/dynamic recipient, the user can pick a field on a form or a Content document containing the value of the desired recipient's email address.

The recipient type for external/dynamic recipients can be changed so you can specify a static email address instead of using a field from the form/document.

Refer to the Appendix for a list of the base Email templates and sample body text for additional information.

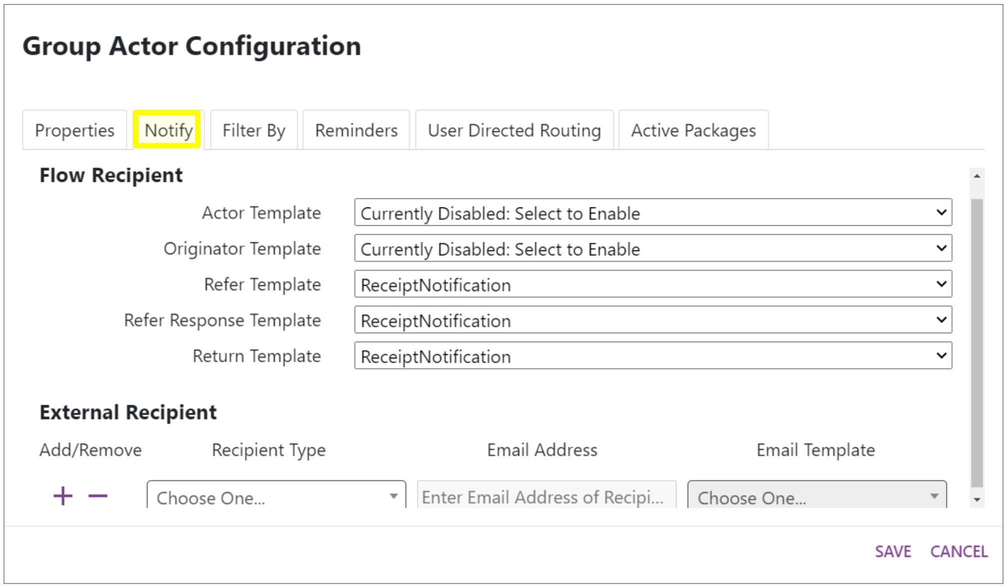


FIGURE 6.8 Workflow Designer | Group Actor Configuration | Notify Tab

FILTER BY TAB | The Filter By tab is located in the Group Actor settings. It is used to reference a user's Custom Properties within Etrieve Security and when configured, delivers a package only to Group members who share the same Custom Property value. This workflow example does not utilize this feature.

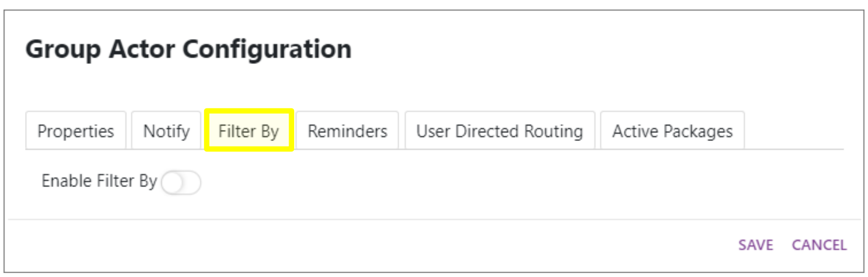


FIGURE 6.9 Workflow Designer | Group Actor Configuration | Filter By

REMINDERS TAB | The Reminders tab contains a setting called "Enable Reminder Notifications" that is a toggle switch to turn on/off reminders at this step. If reminders are set to Off, any pending Reminder Notifications that are supposed to be sent out for the step will not go out. However, when Enabled, pending Reminder Notifications for the step will be checked again at the top of the hour, like usual, and if any of the notification dates have passed the current date and time then notification emails will be generated and sent out.

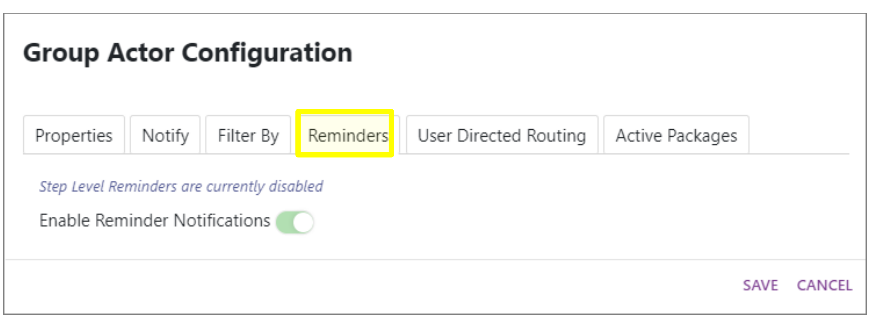


FIGURE 6.10 Workflow Designer | Group Actor Configuration | Reminders

USER DIRECTED ROUTING TAB | The User Directed Routing tab is located in the Group Actor settings. This enables Users to specify which users within a group should receive a package rather than routing to an entire group. It is configured on the actor that will be choosing the recipient. Any group that the actor is connected to can be selected for User Directed Routing. This workflow example does not utilize this feature.

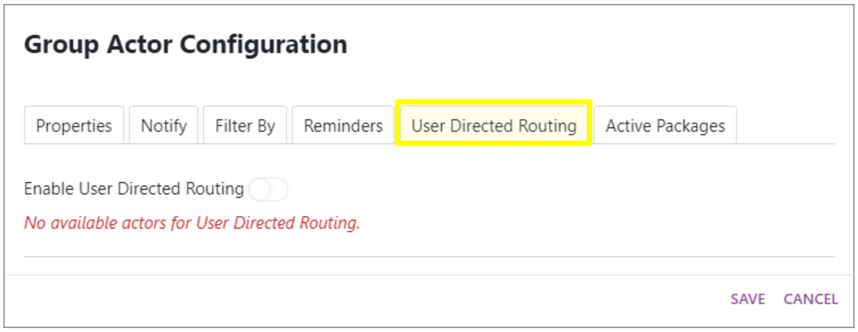


FIGURE 6.11 Workflow Designer | Group Actor Configuration | User Directed Routing

ACTIVE PACKAGES TAB | The Active Packages tab displays all of the Active Packages for the Workflow step. A user can search for a specific package by typing in the Search bar or by selecting the Filter By drop-down selection. The filter can be applied for All, Locked and Unlocked packages. It also gives the ability for an administrator to unlock a package that was locked by another user.

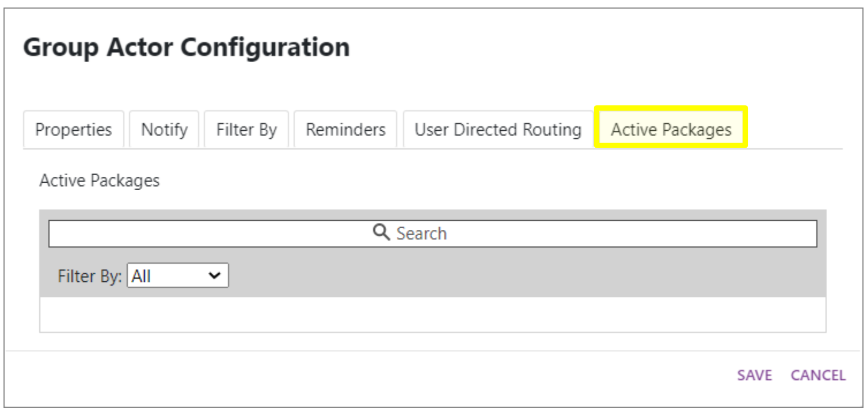


FIGURE 6.12 Workflow Designer | Group Actor Configuration | Active Packages Tab

6.1.2 Conditional Actor, Role Actor, Data Export Activity, Accumulate Activity

In this typical Travel Authorization and Reimbursement Workflow Scenario, a Conditional Actor has been configured to send the form to the originators' supervisor based off of a green flagged field on the form. After the supervisor processes it, the form continues to the travel approvers. If the request is denied, then the Workflow will end. If the request is approved, the green flagged fields on the form are exported to a table and the form is accumulated with a Travel Reimbursement Form, which is then sent to the Business Office for processing.

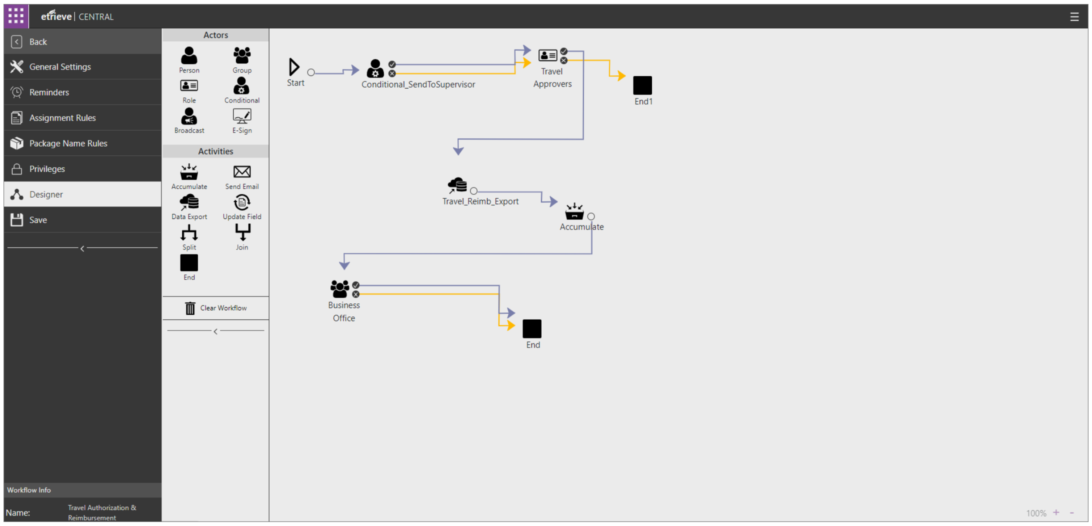


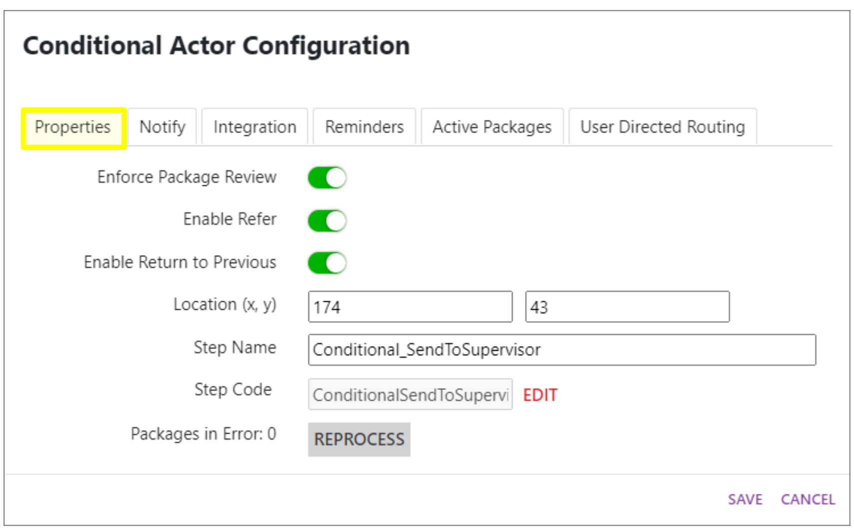
FIGURE 6.13 Workflow Designer | Travel Authorization and Reimbursements

1 Conditional Actor Configuration – Send to Supervisor

CONDITIONAL ACTOR | A single user will receive the package, although the user to receive the package is "conditional" based on form values and integration (recipient can differ from package to package).

PROPERTIES TAB | The Properties tab for the Conditional Actor Configuration allows the user to modify the properties for the conditional actor step. The Enforce Package Review button can be toggled in order to require any actors at this step to review all documents in the package before they are able to act on a package. The Enable Refer button can be toggled to enable or disable the option to refer the document to other users at this step in the workflow. The Enable Return to Previous button can also be toggled to enable or disable the option to return the document to the previous actor in the workflow. The Location (x, y) fields provide the exact coordinate points on the Workflow Designer Configuration Area where the step is located.

The Packages in Error field indicates any routing errors that need to be resolved.



TIP: If Enforce Package Review is turned on at a specific step in a workflow but the user has not filled out the required fields on a form, an error message will prompt the user that they need to complete the required form entry.

FIGURE 6.14 Workflow Designer | Conditional Actor Configuration | Properties Tab

NOTIFY TAB | The Notify tab provides the ability for to configure the templates for each type of notify recipient. This feature can be enabled or disabled by choosing the email template from the dropdown. If no email template is chosen, that notification will be disabled. You can specify a template for the actor, originator, refer, refer response and return for each individual actor.

The Originator Email Template provides a notification email to be sent to the originator if necessary. When a user originates a form, the email notifications the user receives will include a link to the workflow package.

An external/dynamic email recipient can be configured. When configuring a external/dynamic recipient, the user can pick a field on a form or a Content document containing the value of the desired recipient's email address.

The recipient type for external/dynamic recipients can be changed so you can specify a static email address instead of using a field from the form/document.

Refer to the Appendix for a list of the base Email templates and sample body text for additional information.

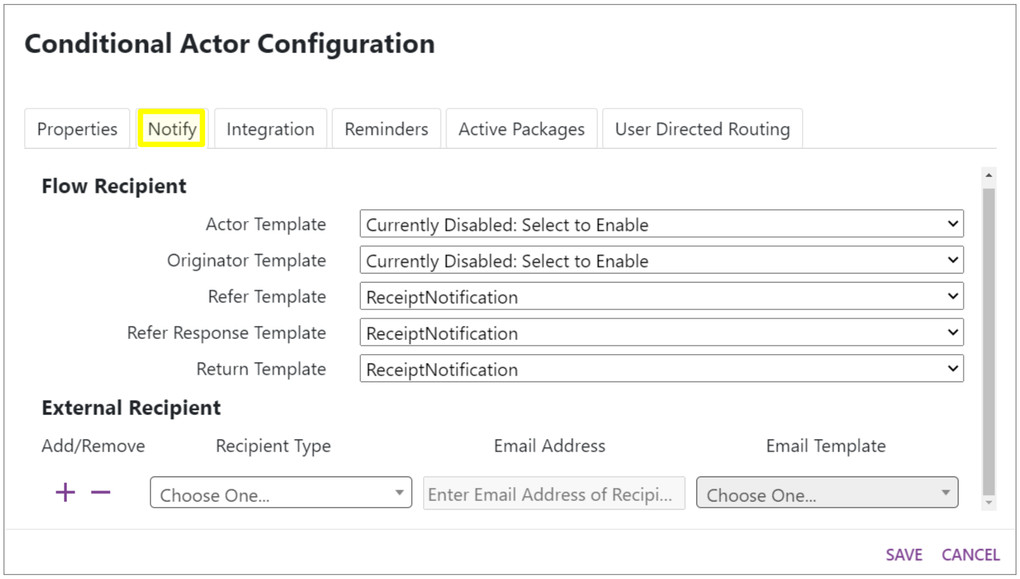


FIGURE 6.15 Workflow Designer | Conditional Actor Configuration | Notify Tab

INTEGRATION TAB | The Integration tab is where the integration source will be configured. The source must be created before the integration mapping can be configured. The Fields key is a drop-down list of fields that are specified as input from Etrieve Forms earlier in configuration. The Actor Type allows you to choose whether the Conditional Actor is looking for a Person, Group, or Role. The Default Actor is the actor that will receive the form should the query return null.

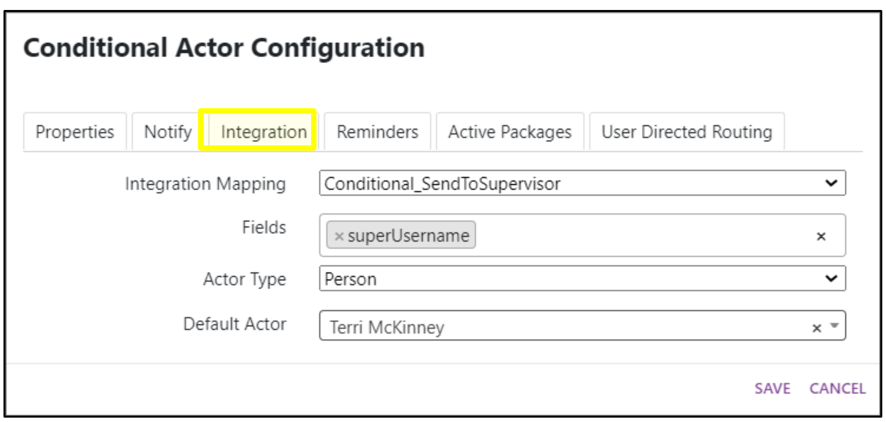


FIGURE 6.16 Workflow Designer | Conditional Actor Configuration | Integration Tab

REMINDERS TAB | The Reminders tab contains a setting called "Enable Reminder Notifications" that is a toggle switch to turn on/off reminders at this step. If reminders are set to Off, any pending Reminder Notifications that are supposed to be sent out for the step will not go out. However, when Enabled, pending Reminder Notifications for the step will be checked again at the top of the hour, like usual, and if any of the notification dates have passed the current date and time then notification emails will be generated and sent out.

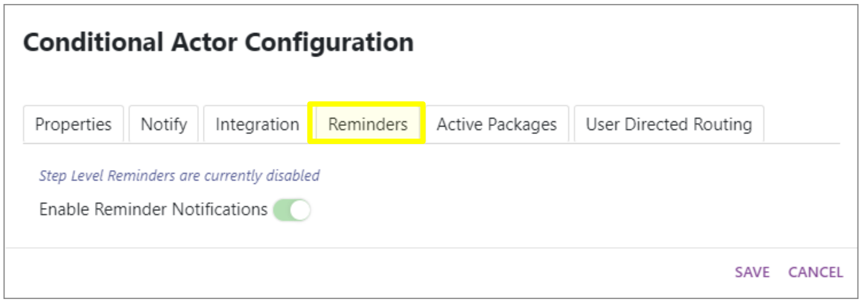


FIGURE 6.17 Workflow Designer | Conditional Actor Configuration | Reminders Tab

ACTIVE PACKAGES TAB | The Active Packages tab displays all of the Active Packages for the Workflow step. A user can search for a specific package by typing in the Search bar or by selecting the Filter By drop-down selection. The filter can be applied for All, Locked and Unlocked packages.

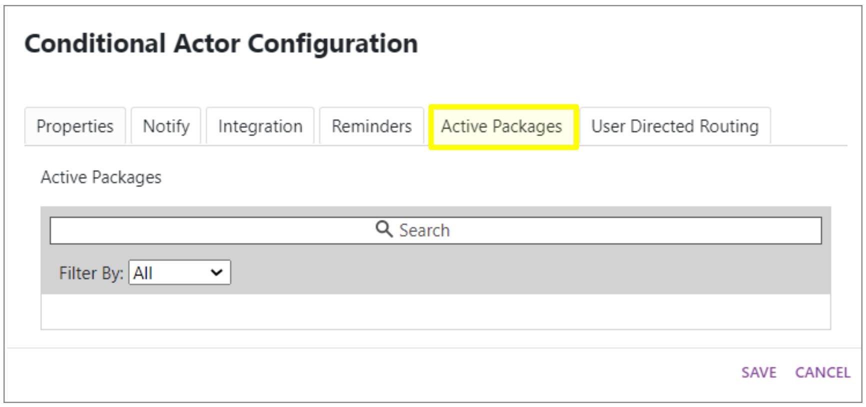


FIGURE 6.18 Workflow Designer | Conditional Actor Configuration | Active Packages Tab

USER DIRECTED ROUTING TAB | The User Directed Routing tab is located in the Conditional Actor settings. This enables Users to specify which users within a group should receive a package rather than routing to an entire group. It is configured on the actor that will be choosing the recipient. Any group that the actor is connected to can be selected for User Directed Routing. This workflow example does not utilize this feature.

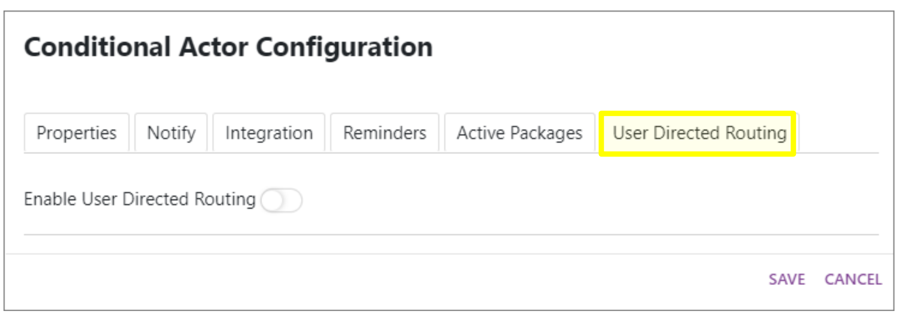


FIGURE 6.19 Workflow Designer | Conditional Actor Configuration | User Directed Routing Tab

2 Role Actor Configuration

ROLE | All users who have been assigned to the selected role will receive the package.

PROPERTIES TAB | The Properties tab for the Role Actor Configuration allows the user to modify the properties for the role actor step. The Role drop-down list allows users to select the Role for this step of the workflow. The Enforce Package Review button can be toggled in order to require any actors at this step to review all documents in the package before they are able to act on a package. The Enable Refer button can be toggled to enable or disable the option to refer the document to other users at this step in the workflow. The Enable Return to Previous button can also be toggled to enable or disable the option to return the document to the previous actor in the workflow. The Location (x, y) fields provide the exact coordinate points on the Workflow Designer Configuration Area where the step is located.

The Packages in Error field indicates any routing errors that need to be resolved.

TIP: If Enforce Package Review is turned on at a specific step in a workflow but the user has not filled out the required fields on a form, an error message will prompt the user that they need to complete the required form entry.

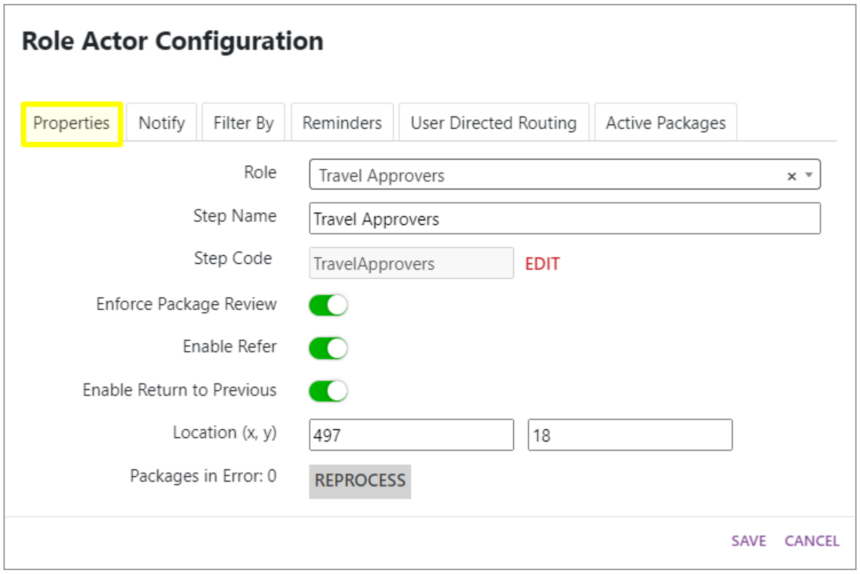


FIGURE 6.20 Workflow Designer | Role Actor Configuration | Properties Tab

NOTIFY TAB | The Notify tab provides the ability for to configure the templates for each type of notify recipient. This feature can be enabled or disabled by choosing the email template from the dropdown. If no email template is chosen, that notification will be disabled. You can specify a template for the actor, originator, refer, and refer response for each individual actor.

The Originator Email Template provides a notification email to be sent to the originator if necessary. When a user originates a form, the email notifications the user receives will include a link to the workflow package.

An external/dynamic email recipient can be configured. When configuring a external/dynamic recipient, the user can pick a field on a form or a Content document containing the value of the desired recipient's email address.

The recipient type for external/dynamic recipients can be changed so you can specify a static email address instead of using a field from the form/document.

Refer to the Appendix for a list of the base Email templates and sample body text for additional information.

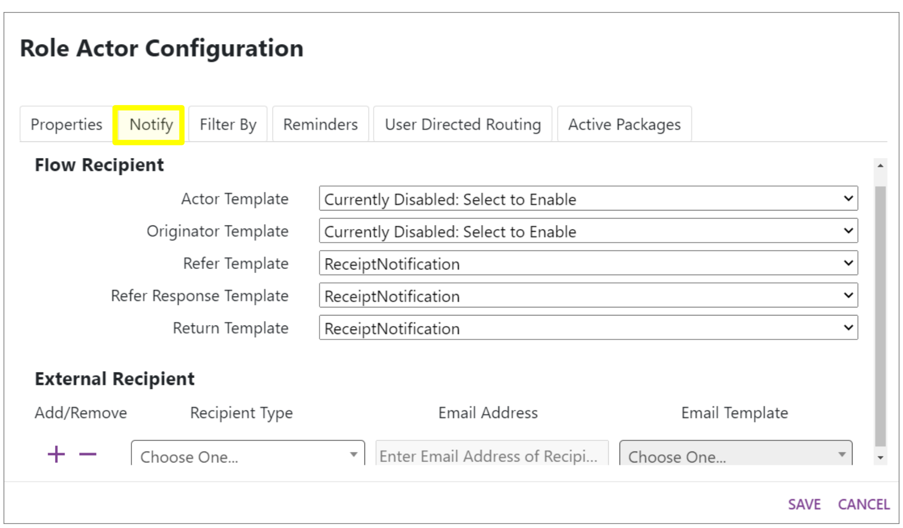


FIGURE 6.21 Workflow Designer | Role Actor Configuration | Notify Tab

FILTER BY TAB | The Filter By tab is located in the Role Actor settings. It is used to reference a user's Custom Properties within Etrieve Security and will deliver a package only to Group members who share the same Custom Property value. This workflow example does not utilize this feature.

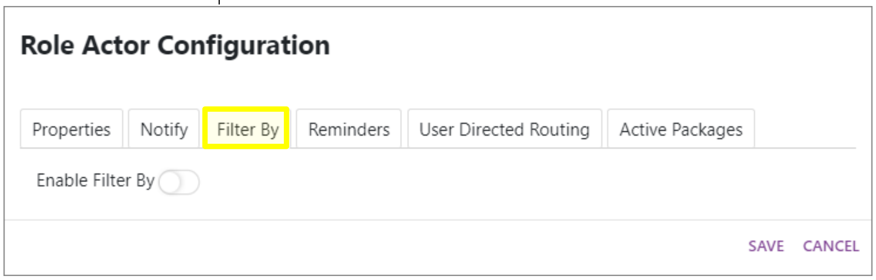


FIGURE 6.22 Workflow Designer | Role Actor Configuration | Filter By

REMINDERS TAB | The Reminders tab contains a setting called "Enable Reminder Notifications" that is a toggle switch to turn on/off reminders at this step. If reminders are set to Off, any pending Reminder Notifications that are supposed to be sent out for the step will not go out. However, when Enabled, pending Reminder Notifications for the step will be checked again at the top of the hour, like usual, and if any of the notification dates have passed the current date and time then notification emails will be generated and sent out.

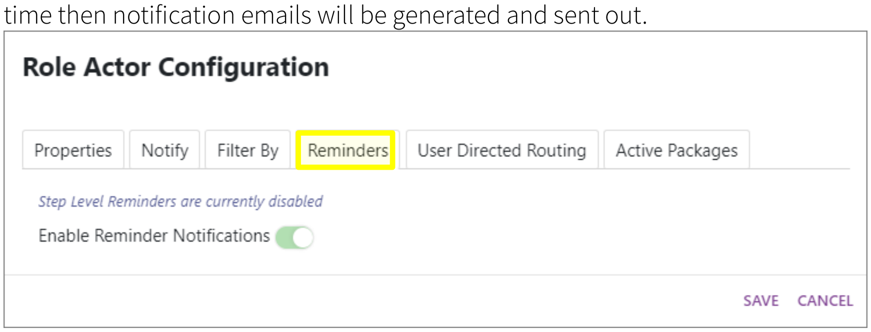


FIGURE 6.23 Workflow Designer | Role Actor Configuration | Reminders

USER DIRECTED ROUTING TAB | The User Directed Routing tab is located in the Group Actor settings. This enables Users to specify which users within a group should receive a package rather than routing to an entire group. It is configured on the actor that will be choosing the recipient. Any group that the actor is connected to can be selected for User Directed Routing. This workflow example does not utilize this feature.

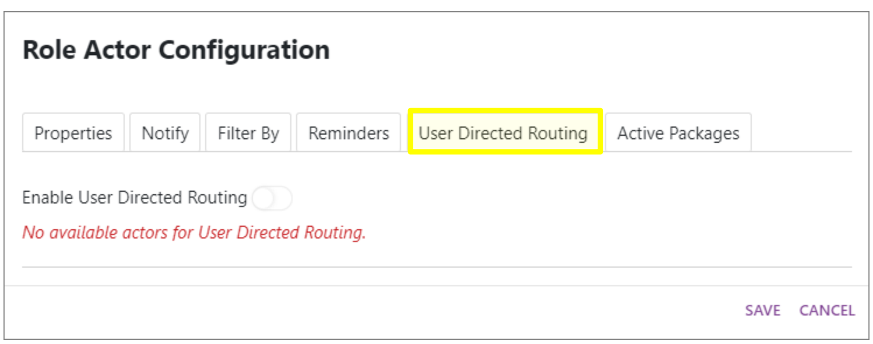


FIGURE 6.24 Workflow Designer | Role Actor Configuration | User Directed Routing

ACTIVE PACKAGES TAB | The Active Packages tab displays all of the Active Packages for the Workflow step. A user can search for a specific package by typing in the Search bar or by selecting the Filter By drop-down selection. The filter can be applied for All, Locked and Unlocked packages.

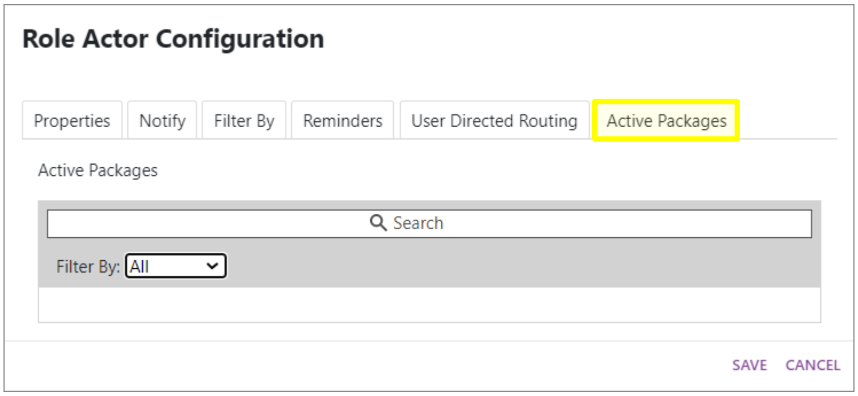


FIGURE 6.25 Workflow Designer | Role Actor Configuration | Active Packages Tab

3 Data Export Activity Configuration

DATA-EXPORT | This activity can be used to export data from a form to an integrated table. This process is often used for reporting. The type of table integration will need to be configured, and the desired form inputs will have to be marked as "key fields" for the data-export activity to write form input values to the designated table. Each new form that passes through this activity in a Workflow will write a new row to this table – all green flagged key field values will be exported to the table as columns in specific forms row. The ID's of the fields must match the column names.

PROPERTIES TAB | The Properties tab for the Data Export Activity Configuration provides a drop-down list to choose which item will be exported if there is an accumulation activity in your Workflow. The Integration Mapping allows you to select the pre-configured integration source. The tab also provides the Location (x, y), the exact coordinate points on the Workflow Designer Configuration Area where the step is located. The Packages in Error indicate any routing errors that need to be resolved.

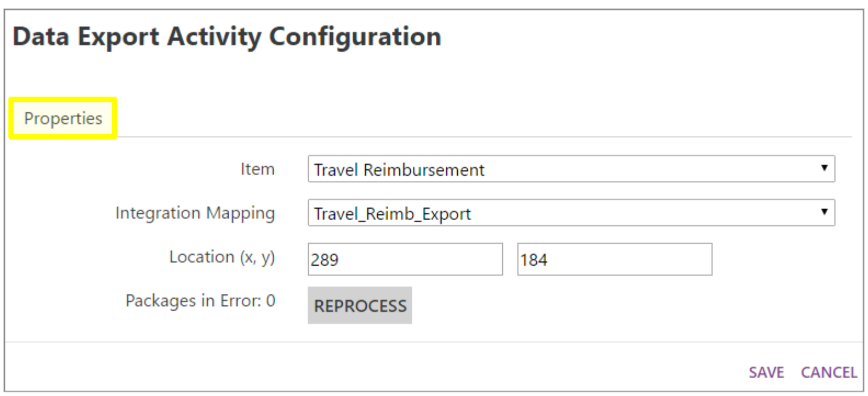


FIGURE 6.26 Workflow Designer | Data Export Configuration | Properties Tab

4 Accumulate Activity Configuration

ACCUMULATE | This activity is used to "accumulate" multiple packages to be combined and routed as a single package once the parameters of the accumulation are satisfied. Once all forms are accumulated the new form package will route to the next Actor/Activity containing all of the completed forms.

PROPERTIES TAB | The Properties tab for the Accumulate Activity Configuration provides the Location (x, y), the exact coordinate points on the Workflow Designer Configuration Area where the step is located. The Packages in Error indicate any routing errors that need to be resolved.

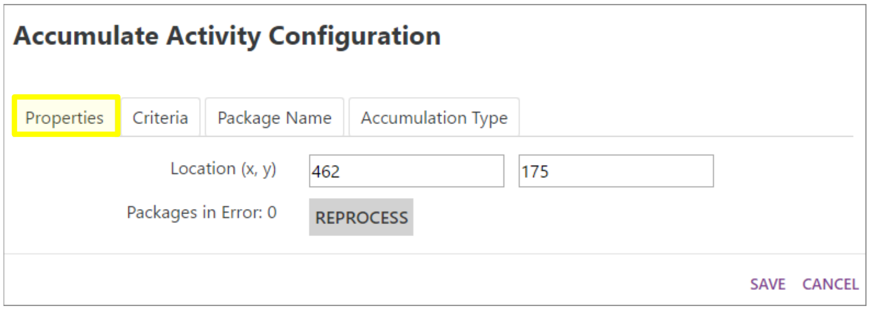


FIGURE 6.27 Workflow Designer | Accumulate Activity Configuration | Properties Tab

CRITERIA TAB | You must select a shared key field between all documents. You can then specify how much of each document should be accumulated for it to be considered complete. The documents must be associated in the Assignment Rules configuration setting.

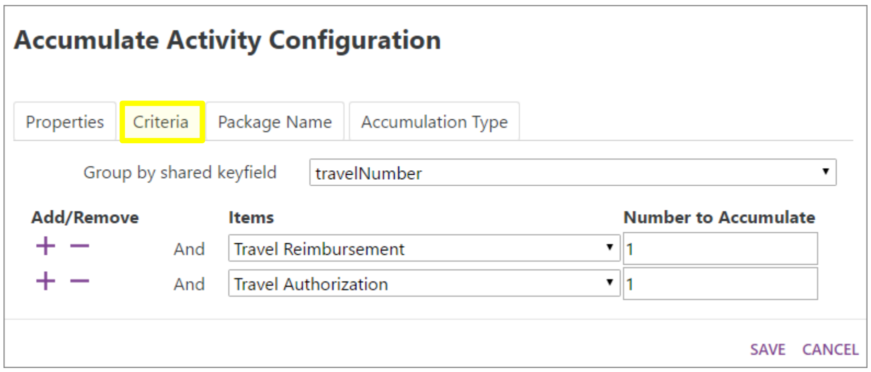


FIGURE 6.28 Workflow Designer | Accumulate Activity Configuration | Criteria Tab

PACKAGE NAME TAB | The Package Name tab provides the template for the name of the Package as well as the choice to default to the name chosen or create a custom, unique name for this accumulated package.

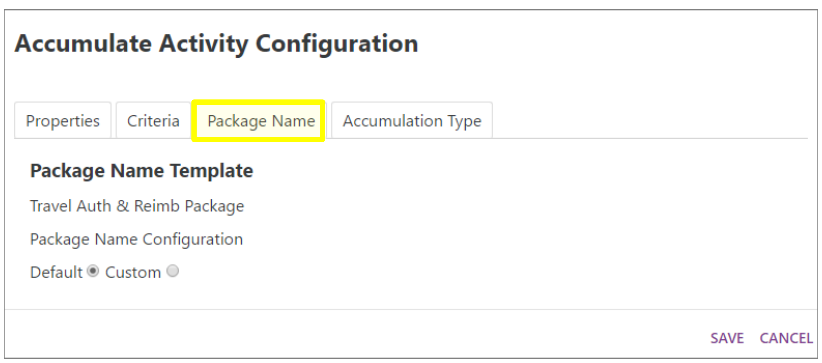


FIGURE 6.29 Workflow Designer | Accumulate Activity Configuration | Package Name Tab

ACCUMULATION TYPE TAB | The Accumulation Behavior type tab provides a drop-down list of options to allow the user to select the behavior that best describes the action that will be taken in regards to the Package being created. When designing a Workflow with only one form/document, the system provides for the accumulate activity configuration to group by the key fields available in a single form by using the key fields associated with the form. Accumulation behavior can be configured on New Packages, Add to Existing Packages or Drop if not needed.

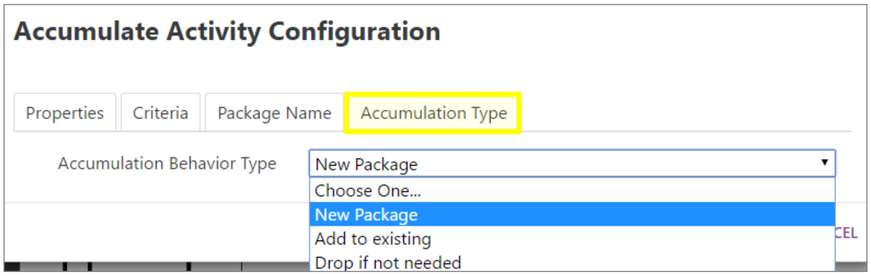


FIGURE 6.30 Workflow Designer | Accumulate Activity Configuration | Accumulation Behavior Type Tab

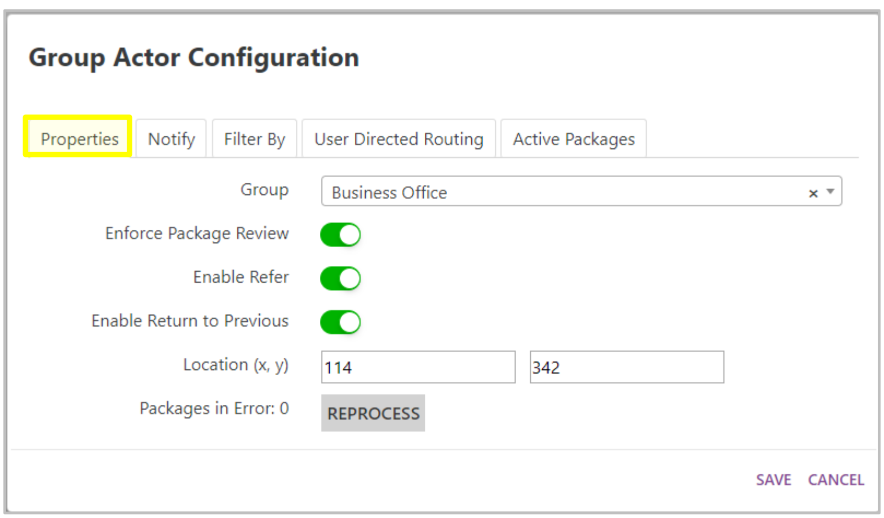
NOTE | If Item Type Name is part of the naming options for the Package Name Rules, Accumulate will use the Workflow Name if Default is selected on Accumulate and a custom name is selected for the Package Name Rules. When Package Name Rules do not contain Item Type Name as part of the naming options when a customized name is set, Accumulate will use what is defined on Package Name Rules when the default option is selected for that step.

5 Group Actor Configuration

GROUP | All users who are members of the chosen group will receive the package.

PROPERTIES TAB | The Properties tab for the Group Actor Configuration allows the user to modify the properties for the group actor step. The Group drop-down list allows users to select the group for this step of the workflow. The Enforce Package Review button can be toggled in order to require any actors at this step to review all documents in the package before they are able to act on a package. The Enable Refer button can be toggled to enable or disable the option to refer the document to other users at this step in the workflow. The Enable Return to Previous button can also be toggled to enable or disable the option to return the document to the previous actor in the workflow. The Location (x, y) fields provide the exact coordinate points on the Workflow Designer Configuration Area where the step is located.

The Packages in Error field indicates any routing errors that need to be resolved.



TIP: If Enforce Package Review is turned on at a specific step in a workflow but the user has not filled out the required fields on a form, an error message will prompt the user that they need to complete the required form entry.

FIGURE 6.31 Workflow Designer | Group Actor Configuration | Properties Tab

NOTIFY TAB | The Notify tab provides the ability for to configure the templates for each type of notify recipient. This feature can be enabled or disabled by choosing the email template from the dropdown. If no email template is chosen, that notification will be disabled. You can specify a template for the actor, originator, refer, and refer response for each individual actor.

The Originator Email Template provides a notification email to be sent to the originator if necessary. When a user originates a form, the email notifications the user receives will include a link to the workflow package.

An external/dynamic email recipient can be configured. When configuring a external/dynamic recipient, the user can pick a field on a form or a Content document containing the value of the desired recipient's email address.

The recipient type for external/dynamic recipients can be changed so you can specify a static email address instead of using a field from the form/document.

Refer to the Appendix for a list of the base Email templates and sample body text for additional information.

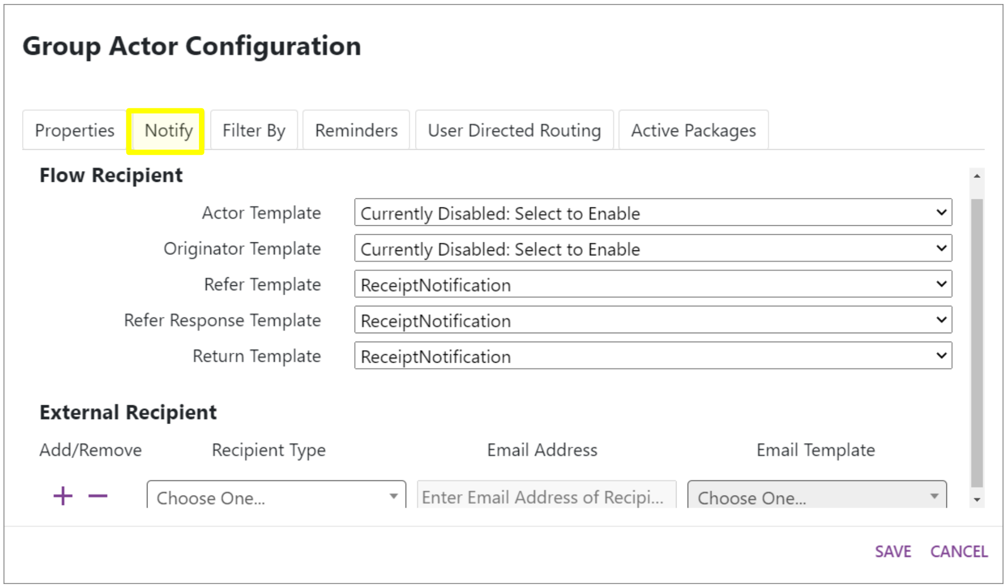


FIGURE 6.32 Workflow Designer | Group Actor Configuration | Notify Tab

FILTER BY TAB | The Filter By tab is located in the Role Actor settings. It is used to reference a user's Custom Properties within Etrieve Security and will deliver a package only to Group members who share the same Custom Property value. This workflow example does not utilize this feature.

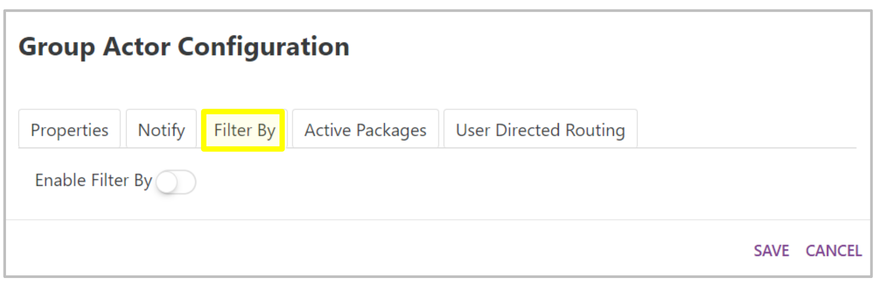


FIGURE 6.33 Workflow Designer | Group Actor Configuration | Active Packages Tab

ACTIVE PACKAGES TAB | The Active Packages tab displays all of the Active Packages for the Workflow step. A user can search for a specific package by typing in the Search bar or by selecting the Filter By drop-down selection. The filter can be applied for All, Locked and Unlocked packages.

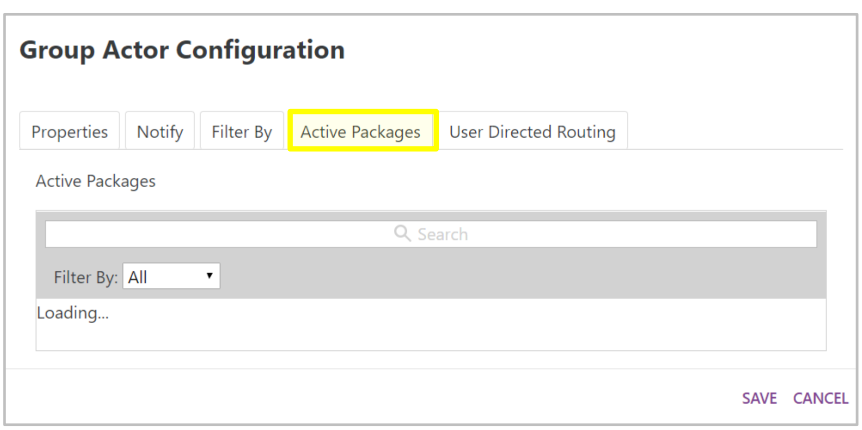


FIGURE 6.34 Workflow Designer | Group Actor Configuration | Active Packages Tab

USER DIRECTED ROUTING TAB | The User Directed Routing tab is located in the Group Actor settings. This enables Users to specify which users within a group should receive a package rather than routing to an entire group. It is configured on the actor that will be choosing the recipient. Any group that the actor is connected to can be selected for User Directed Routing. This workflow example does not utilize this feature.

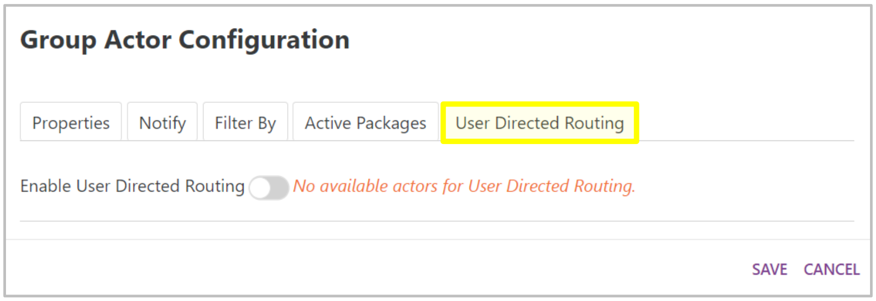


FIGURE 6.35 Workflow Designer | Group Actor Configuration | User Direction Routing

6.1.3 Update Field Activity

In this Workflow scenario, a Direct Deposit Authorization document is scanned into Etrieve Content and routed to the Payroll group for approval. The Update Field activity is used to update the applicable document type's key fields as the route is being processed. If the Payroll group approves the Direct Deposit Authorization, then the key field of Status is set to "Reviewed" and the Workflow ends. If the Direct Deposit Authorization is denied, the key field of Status is set to "Incomplete" and routed back to the Payroll Group for further processing.

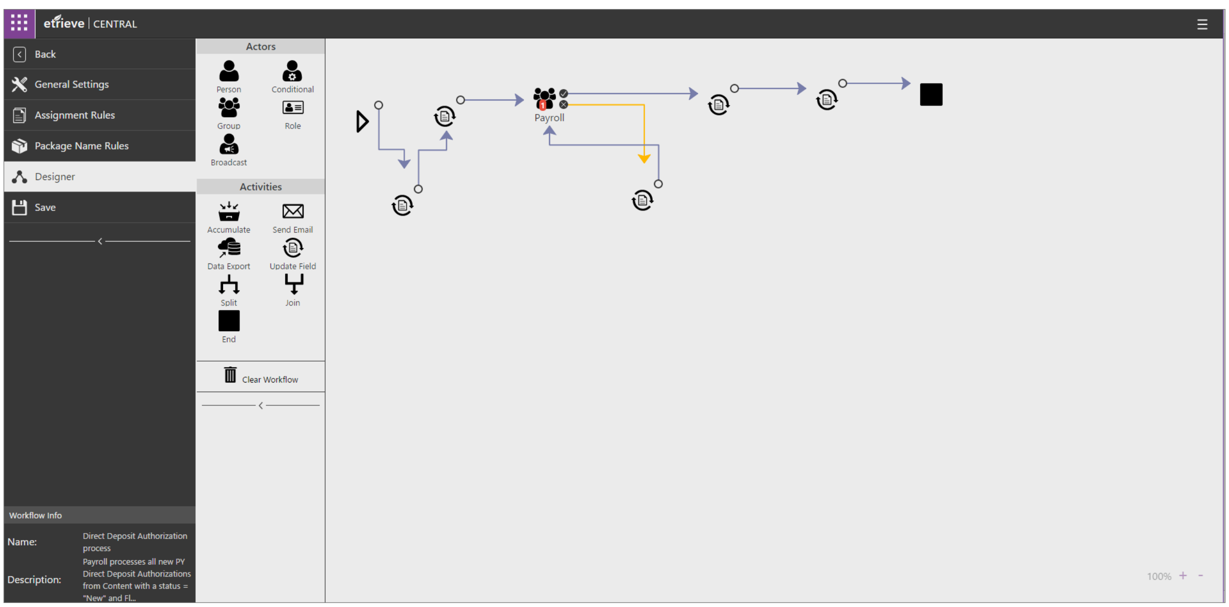


FIGURE 6.36 Workflow Designer | Direct Deposit Authorization Process

1 Update Content Field Activity Configuration

UPDATE FIELD | Used in routing a Content document, updates a specified field value. Unused in the routing of forms.

PROPERTIES TAB | The Properties tab for the Update Content Field Activity Configuration provides a drop-down list to select which item from the list of assigned document types to be updated. Next to that, the key field within the specified item should be chosen to make appropriate updates. The Key field is updated with the data provided in the New Value field. This tab also provides the Location (x, y), the exact coordinate points on the Workflow Designer Configuration Area where the step is located. The Packages in Error indicate any routing errors that need to be resolved.

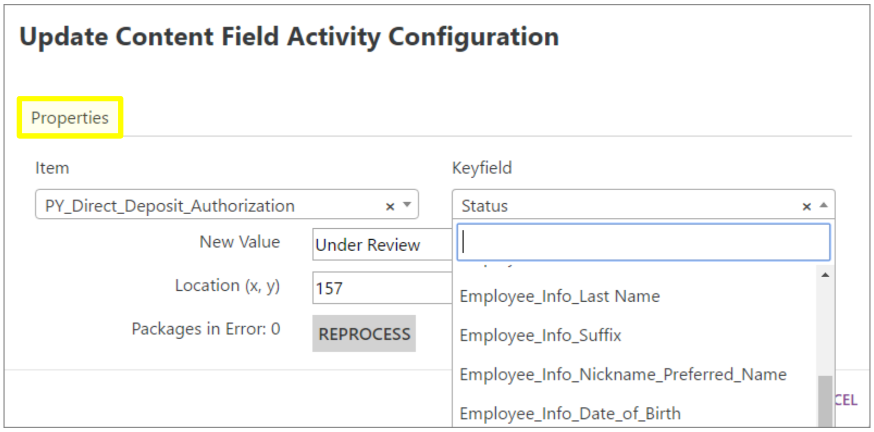


FIGURE 6.37 Workflow Designer | Update Content Field Activity | Properties Tab

6.1.4 Join and Split– Illustration of Best Practice

In this Workflow configuration scenario, the Split Activity is configured to allow for the package to be split and routed to two different groups; the Business Office and Human Resources. Once each group has approved the packages, the Join Activity is configured to combine the packages that were previously split and send them to the group Human Resources Supervisor and once approved, the process ends.

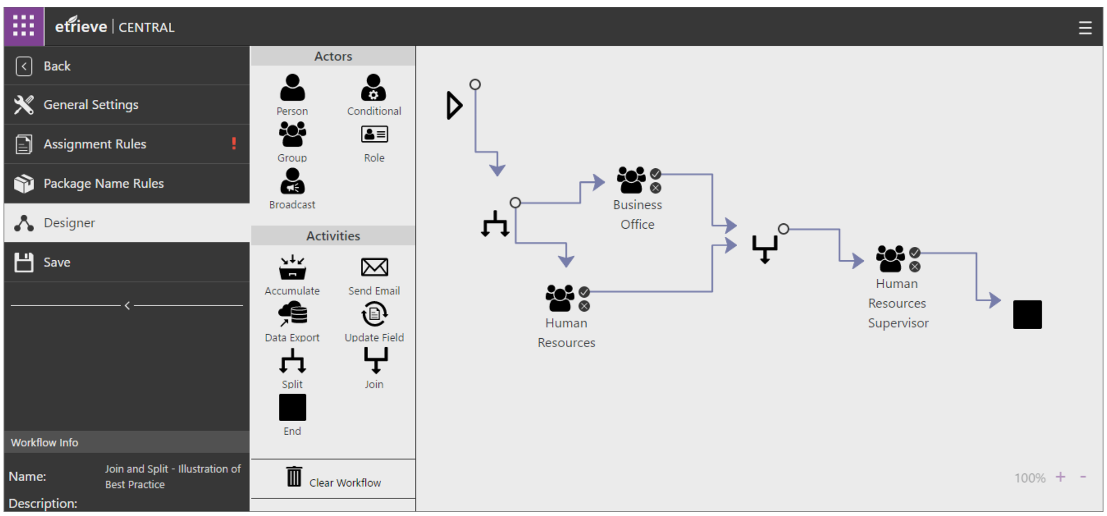


FIGURE 6.38 Workflow Designer | Join and Split – Illustration of Best Practice

1 Split Activity Configuration

SPLIT | This activity is used to duplicate the package to allow the package to be routed to multiple actors/activities simultaneously.

PROPERTIES TAB | The Properties tab for the Split Activity Configuration provides the Location (x, y), the exact coordinate points on the Workflow Designer Configuration Area where the step is located. The Packages in Error indicate any routing errors that need to be resolved.

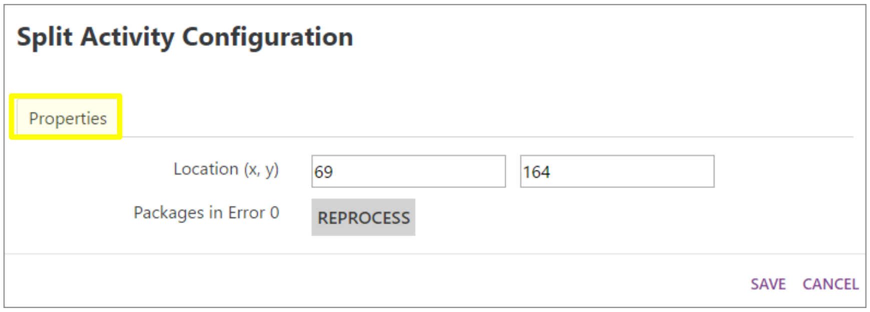


FIGURE 6.39 Workflow Designer | Split Activity Configuration | Properties Tab

2 Join Activity Configuration

JOIN | This activity combines packages that were previously split into one single package. The number of packages must equal the number of packages that are being routed into the Join for routing to execute successfully.

PROPERTIES TAB | The Properties tab for the Join Activity Configuration provides the Location (x, y), the exact coordinate points on the Workflow Designer Configuration Area where the step is located. The Packages in Error indicate any routing errors that need to be resolved.

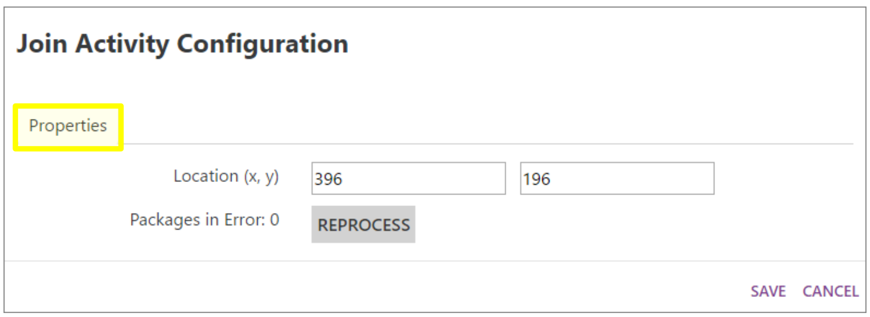


FIGURE 6.40 Workflow Designer | Join Activity Configuration | Properties Tab

6.1.5 Join and Split – Illustration of a Join and Split that will not Execute

In this Workflow configuration scenario, the Group step for Human Resources has an alternate end path, and the Join Activity step does not equal the number of packages that were split into separate packages. If Human Resources denied the package, the package approved by the Business Office will get held in the Join Activity resulting in a Workflow that will not execute.

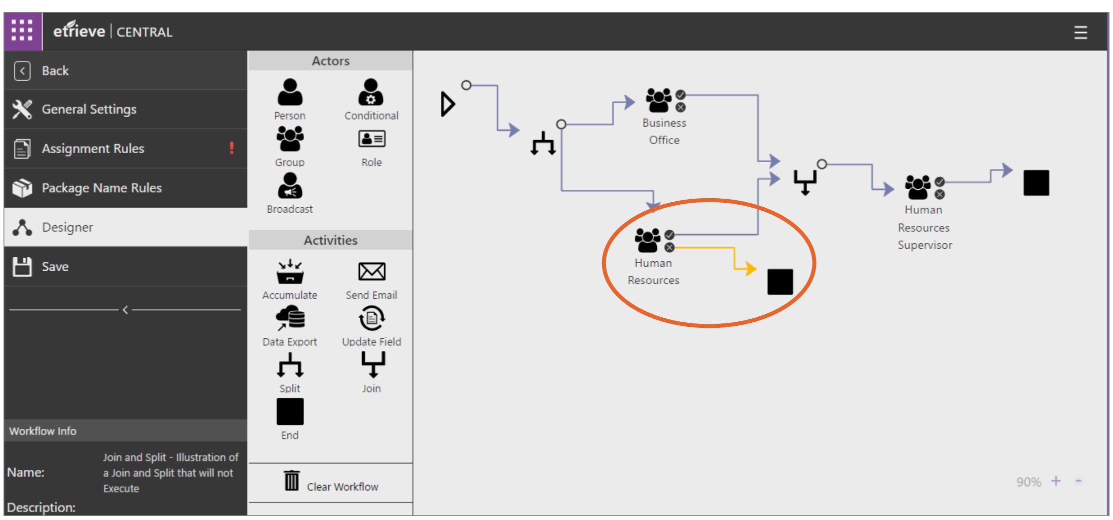


FIGURE 6.41 Workflow Designer | Join and Split – Illustration of a Join and Split that will not Execute

6.1.6 Actor Filtering, UDR, Navigation Rules Determined by Groups or Roles

In this Workflow scenario, a Leave Request Form is originated by an employee and sent to their specific supervisor by utilizing the 'Filter By' setting on the Supervisors Group Actor. The supervisor reviews the package and either denies the request or approves it to the Human Resources group. Human Resources chooses a member of the Directors Group to send the package to by utilizing User Directed Routing.

If the originator of the Leave Request belongs to the Supervisors group, then the package will bypass that Group and route directly to the Human Resources Group for approval. This is achieved by using Navigation Rules and filtering determined by Etrieve Security Group membership.

If a package is routed to a specific member of a group using User Directed Routing and is acted on by them, it will be listed only in that member's activity. The activity of the other group members will not indicate that the package was acted upon.

NOTE | User Directed Routing and Actor Filtering cannot be used on the same step to determine the next step in a given workflow.

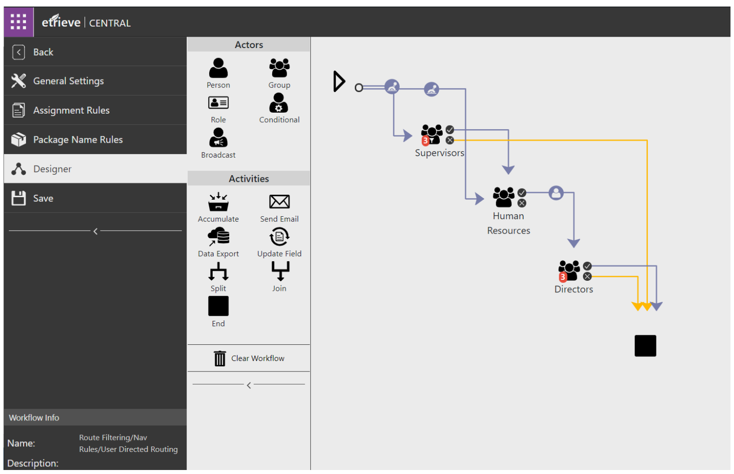


FIGURE 6.42 Workflow Designer | Leave Request

1 Filter By Configuration – Filter Supervisors Group Actor

FILTER BY | The Filter By tab is located in the Role Actor settings. It is used to reference a user's Custom Properties within Etrieve Security and will deliver a package only to Group members who share the same Custom Property value.

CONFIGURATION | In this workflow example, we leverage this feature to deliver the originator's leave request to the proper member of the Supervisors Etrieve Security Group automatically based on a "Location" Custom Property that has been previously configured in Etrieve Security.

This functionality is enabled on the Filter By Tab of the Group Actor's configuration by moving the Enable Filter By slider to the right. To set up a Filter, select a previous step and a user attribute to filter by. In this workflow, the previous step is the Start Activity, and the attribute is the "Location" Custom Property. Once this is configured, only members of the Supervisors Group who share the same "Location" Custom Property value as the originator will receive the Leave Request.

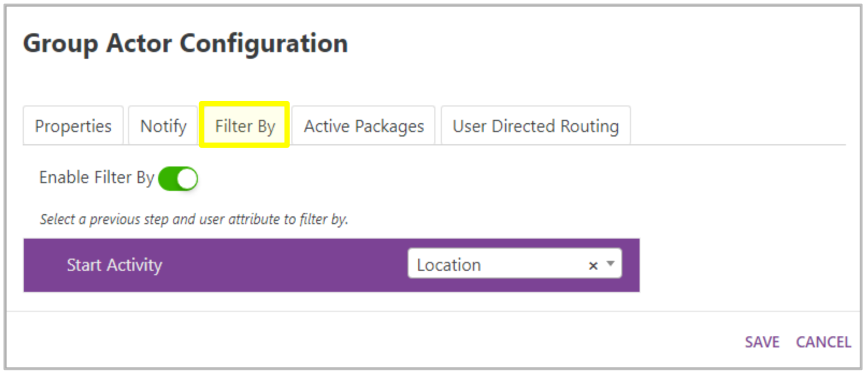


FIGURE 6.43 Workflow Designer | Group Actor Configuration | Filter By

The Actor icon will change if Filter By is enabled on the actor.

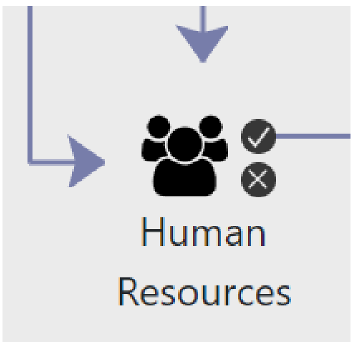


FIGURE 6.44 a Filter By disabled

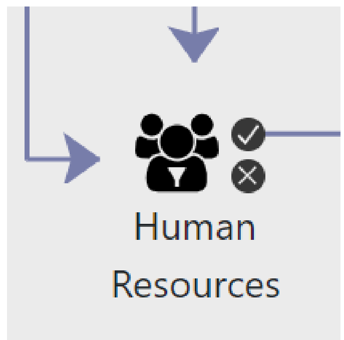


FIGURE 6.44 b Filter By enabled

If the Originator has multiple values for Location Custom Property, they will be prompted to Select Submission Data on Submit. Designate the correct option from the drop-down menu and this will assist in creating simpler workflows.

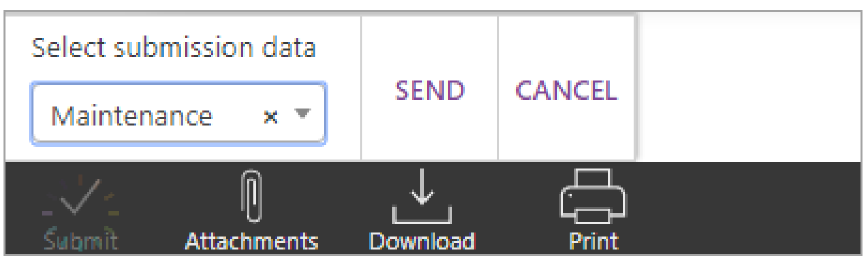


FIGURE 6.45 Etrieve Central Viewer | Select Submission Data

2 User Directed Routing Configuration – Send to specific member of the Directors Group

CONFIGURATION | In this workflow example, User Directed Routing will be configured to allow a member of the Human Resources Group to choose which member of the Directors Group to route the package to.

USER DIRECTED ROUTING | The User Directed Routing tab is located in the Group Actor settings. This enables Users to specify which users within a group should receive a package rather than routing to an entire group. It is configured on the actor that will be choosing the recipient. Any group that the actor is connected to can be selected for User Directed Routing.

To enable this functionality, select the Human Resources Group actor and click the Settings Cog. Select the User Directed Routing tab and move the slider to the right to enable. Select the Directors Group and Save.

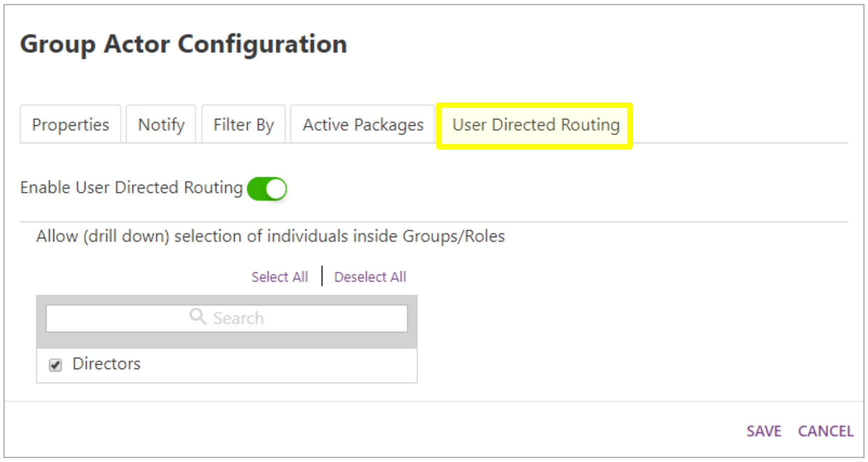


FIGURE 6.46 Workflow Designer | Group Actor Configuration | User Directed Routing

When user directed routing is enabled, the Connector will indicate with a small user icon.

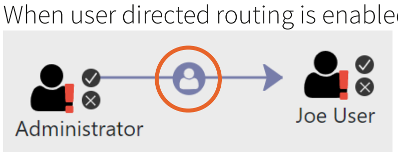


FIGURE 6.47 User Directed Routing Indicator

Now, the user that receives this package in their Inbox from a member of the Human Resources Group will have the ability to choose which member of the Directors Group the Package will be sent to for approval (Approve To Icon).

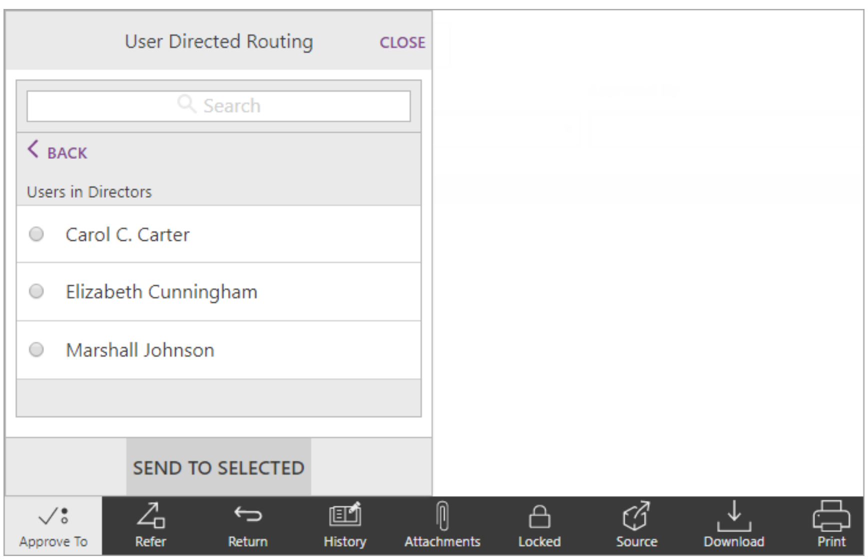


FIGURE 6.48 Etrieve Central Viewer | User Directed Routing

3 Navigation Rule Configuration – Send to Supervisor or Human Resources

NAVIGATION RULE | Navigation Rules are used to route a package based on certain configured criteria. Rules can be set by Connectors based on Key Fields or Actor Attributes.

CONFIGURATION | To enable this functionality, select the Connector pointing towards the Human Resources actor and click the Settings Cog. To reference the Originator's Etrieve Security Group Membership, select Actor Attributes from the Type drop down and Groups from the Key field/Attribute drop down. Select Contain from the Operator drop down, and choose the Supervisors from the list of Etrieve Security Groups from the Value drop down.

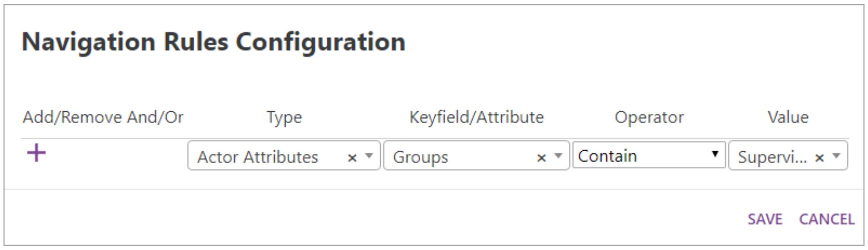


FIGURE 6.49 Workflow Designer | Navigation Rule Configuration

A Navigation Rule with the operator ‘Does Not Contain’ must also be setup on the Connector pointing to the Supervisors Group.

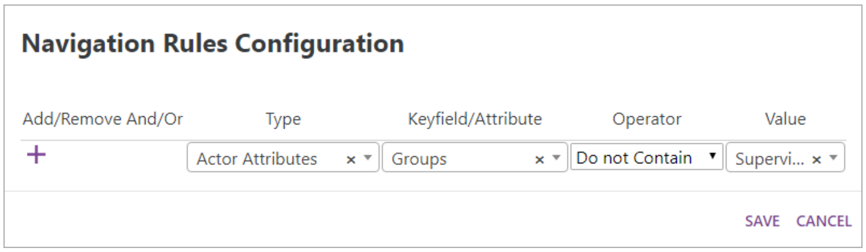


FIGURE 6.50 Workflow Designer | Navigation Rule Configuration

Select Save once the configuration is finished and the workflow will be complete.

6.1.7 Block UDR by the Originator for Anonymous Forms

In Central for Flow where workflows with anonymous Forms will block the Anonymous User from seeing the user listing when User Directed Routing is enabled for the Start step of a Workflow. This ensures an anonymous user only can submit and does not have the ability to indicate who the form will be routed to. It is recommended not to have UDR enabled when the Workflow is associated to an Anonymous Form unless the intent is to route the package to all immediate steps that route from the Star Step.

6.1.8 E-Sign Actor within a Workflow

E-Sign workflows are used when there is a need for an external user to electronically sign an Etrieve Form. The form will need to include:

- designated fields for the Signer Recipient email address and at least one signature field.
- a validation for the email field to ensure a valid email address gets entered.

Before a Form enters the first E-Sign step to be signed (i.e. prior to any signatures being obtained), the E-Sign functionality will allow all fields to be editable (including designated email and signature fields). Once the form reaches the E-Sign step(s), only the signature fields dedicated by that E-Sign step will be editable. After a signature has been obtained then the second E-Sign step will only allow the signature fields for that step to be modified and non-E-Sign steps that the forms is routed to after the first signature is obtained will not allow any field to be modified. Any actor steps that follow an E-Sign step (after signatures have been obtained) will not be allowed to modify the signed form.

E-Sign can be configured for use in parallel (if signatures need to be obtained from multiple Signer Recipients at the same time) or in series (where signatures can be obtained in a certain order). When using multiple E-Sign steps in parallel, the Form is split and sent to all E-Sign steps that is a part of the parallel routes. A Join activity will be needed if E-Sign is used in parallel.

NOTE | If there are overlaps of the same fields amongst the E-Sign steps then only the data entered by first person who updates and signs the Form will be stored. It is recommended not to use the same fields across E-Sign steps.

Some common uses for an E-Sign workflow are the need to obtain signatures from a new hire before they are provided with an internal account. In this case, the form would be started by an HR representative and then routed to the new hire's public email address.

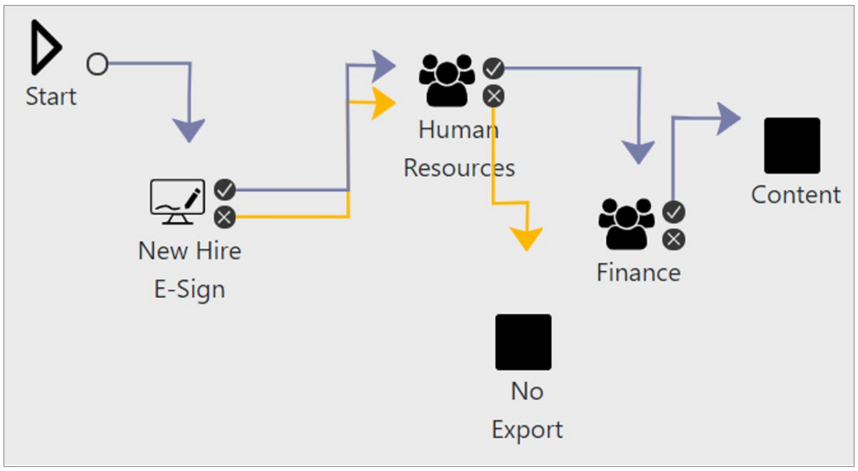


FIGURE 6.51 Workflow Designer | E-Sign HR Workflow for a New Hire Student Start

A dual enrollment workflow can utilize E-Sign to obtain signatures from the High School and/or Parent. The form would be started by the Student then routed to High School Principal and Parent then sent back to be reviewed by Dual Enrollment.

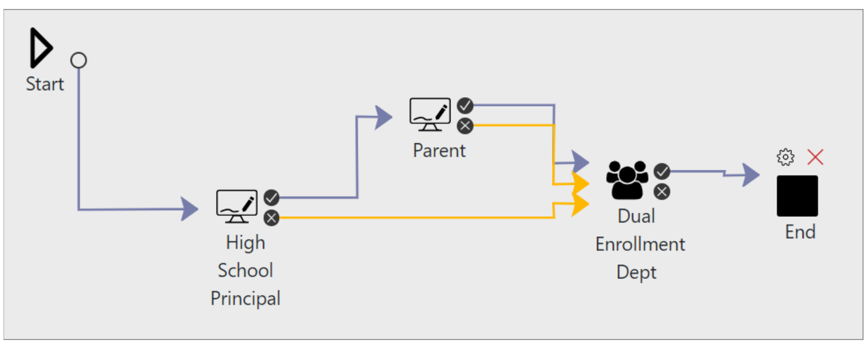


FIGURE 6.52 Workflow Designer | E-Sign Dual Enrollment

Also, an E-Sign workflow can be configured when there are signatures that need to be obtained from a Parent/Guardian of a Student. For this example, the form is started by the Student and routed to the Parent(s) to obtain signatures.

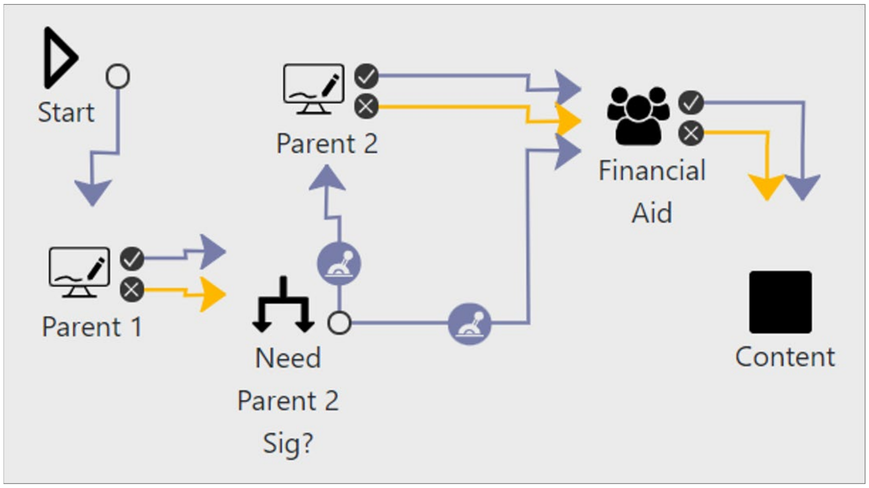


FIGURE 6.53 Workflow Designer | E-Sign Financial Aid Form by Started Student