

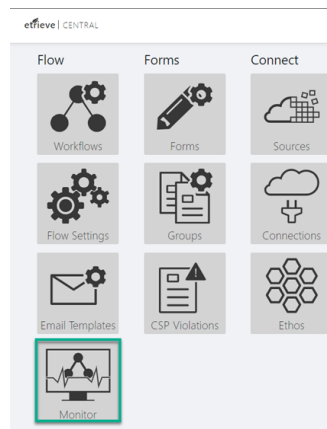
Workflow Monitor

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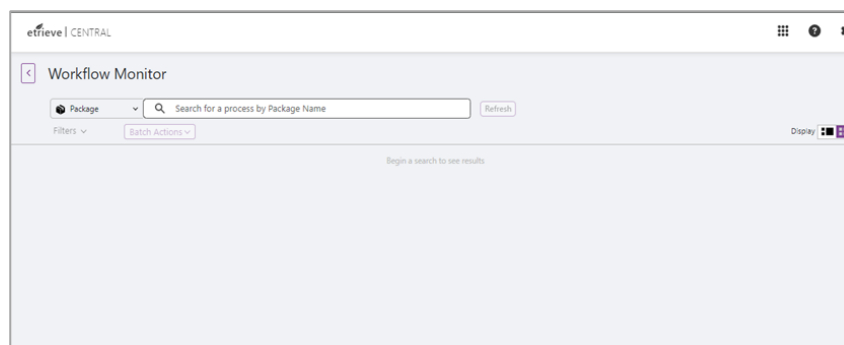
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Workflow Monitor

Once a workflow moves to production and becomes live, administrators can 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. You can select "Monitor," as illustrated below.



Monitor Option within Settings Menu of Etrieve Central



Workflow Monitor Page

Searching for a Package

When a user first enters the Monitor feature, no packages are listed. To find workflows, the user enters the workflow name into the search bar at the top of the page. The workflow must be 'active' to appear in the results.

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Workflow Monitor

Package Refresh

Filters

Name	Status	Workflow	Workflow ...	Current St...	Time at C...	Time in W...	Date Wor...	Date Pack...	Assigned ...	Error Mes...	Locked By	Actor Filter
AH workflow...	In Progress	AH workflow...		Alexander H...	3 weeks, 1 day	1 month, 2 ...	08-22-2024 ...	08-16-2024 ...	Jason Pfeiffer		Jason Pfeiffer	
AH workflow...	In Progress	AH workflow...		Alexander H...	1 month, 0 ...	1 month, 2 ...	08-22-2024 ...	08-06-2024 ...	Alexander H...		Alexander H...	
AH workflow...	In Progress	AH workflow...		Alexander H...	1 month, 3 ...	2 months, 3 ...	07-12-2024 ...	08-16-2024 ...	Alexander H...		Alexander H...	
AH workflow...	In Progress	AH workflow...		Alexander H...	2 months, 3 ...	2 months, 3 ...	07-12-2024 ...	07-12-2024 ...	Alexander H...		Alexander H...	
AH workflow...	In Progress	AH workflow...		Alexander H...	3 months, 0 ...	3 months, 1 ...	06-27-2024 ...	07-09-2024 ...	Wyatt Puckett		Unlocked	
AH workflow...	In Progress	AH workflow...		Alexander H...	3 months, 1 ...	3 months, 1 ...	06-27-2024 ...	06-27-2024 ...	Wyatt Puckett		Unlocked	
akk wft Pack...	In Progress	akk wft		Step 1 - akk ...	2 months, 0 ...	2 months, 0 ...	08-02-2024 ...	08-02-2024 ...	akk p1		Anind Kripa...	
BC ESign Wo...	In Progress	BC ESign Wo...		ESign	3 months, 1 ...	3 months, 1 ...	06-25-2024 ...	06-25-2024 ...	bcheasofto...		Unlocked	

Search Results in Workflow Monitor Page

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Workflow Monitor

Package Refresh

Package

Name	User/Group/Role	Workflow	Workflow ...	Current St...	Time at C...	Time in W...	Date Wor...
AH workf...	Workflow	AH workflow...		Alexander H...	3 weeks, 1 day	1 month, 2 ...	08-22-2024, ...
AH workf...	Submission Date	AH workflow...		Alexander H...	1 month, 0 ...	1 month, 2 ...	08-22-2024, ...
AH workf...	Package Item	AH workflow...		Alexander H...	1 month, 3 ...	2 months, 3 ...	07-12-2024, ...

Search Field Options in Workflow Monitor Page

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

Filtering Search Results

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

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Workflow Monitor

Package Refresh

Filters

Name	Status	Workflow	Workflow ...	Current St...
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Filters Button when Searching for Packages in Workflow Monitor Page

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Workflow Monitor

Package Refresh

Filters

Package Status

☐ In Progress ☐ In Error

Workflow

Select the workflow name to filter results

Workflow Step

Select the workflow step to filter results

Assigned To

Select an actor name to filter results

Active Between

From: mm/dd/yyyy x To: mm/dd/yyyy x

Time At Current Step

Greater than or equal to Number Hours

Reset

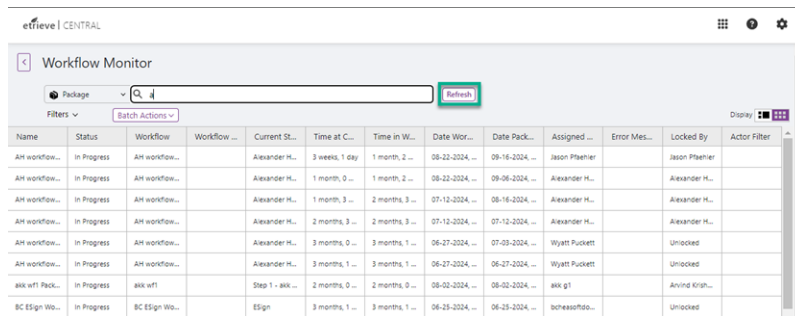
Filter Options when Searching for Packages in Workflow Monitor Page

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

Refreshing Search Results

Once a search has been conducted and results are displayed or no results have been found, the user can 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.



Name	Status	Workflow	Workflow ...	Current St...	Time at C...	Time in W...	Date Wor...	Date Pack...	Assigned ...	Error Mes...	Locked By	Actor Filter
Art workflow...	In Progress	Art workflow...		Alexander H...	3 weeks, 1 day	1 month, 2 ...	09-23-2024, ...	09-16-2024, ...	Jason Pfahner		Jason Pfahner	
Art workflow...	In Progress	Art workflow...		Alexander H...	1 month, 0 ...	1 month, 2 ...	09-23-2024, ...	09-06-2024, ...	Alexander H...		Alexander H...	
Art workflow...	In Progress	Art workflow...		Alexander H...	1 month, 3 ...	2 months, 3 ...	07-12-2024, ...	08-16-2024, ...	Alexander H...		Alexander H...	
Art workflow...	In Progress	Art workflow...		Alexander H...	2 months, 3 ...	2 months, 3 ...	07-12-2024, ...	07-12-2024, ...	Alexander H...		Alexander H...	
Art workflow...	In Progress	Art workflow...		Alexander H...	3 months, 0 ...	3 months, 1 ...	06-27-2024, ...	07-03-2024, ...	Wyatt Puckett		Unlocked	
Art workflow...	In Progress	Art workflow...		Alexander H...	3 months, 1 ...	3 months, 1 ...	06-27-2024, ...	06-27-2024, ...	Wyatt Puckett		Unlocked	
ask wft Pack...	In Progress	ask wft		Step 1 - ask	2 months, 0 ...	2 months, 0 ...	09-03-2024, ...	09-03-2024, ...	ask g1		Arvind Krish...	
BC ESign Wo...	In Progress	BC ESign Wo...		ESign	3 months, 1 ...	3 months, 1 ...	06-25-2024, ...	06-25-2024, ...	schessafdo...		Unlocked	

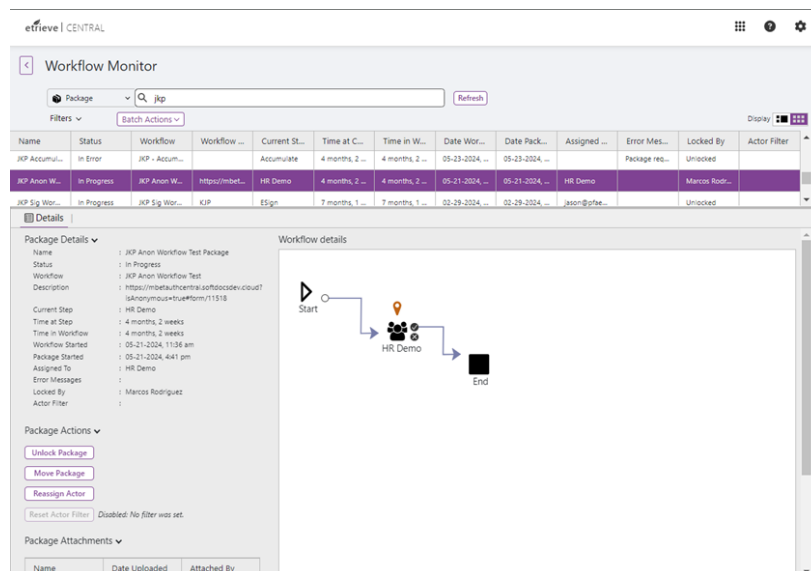
Refreshing Results in Workflow Monitor Page

Search Results View

Searching a keyword will return a list displayed in 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 of the workflow.
5. CURRENT STEP | The current step at which the workflow is waiting.
6. TIME AT CURRENT STEP | The amount of time the workflow has been at the current step in the flow.
7. TIME IN WORKFLOW | The amount of time the workflow has been active for the package.
8. DATE WORKFLOW STARTED | The date 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 any user has locked the workflow, 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 on 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 to the package.



Workflow Monitor

Package: Refresh

Filters:

Name	Status	Workflow	Workflow ...	Current St...	Time at C...	Time in W...	Date Wor...	Date Pack...	Assigned ...	Error Mes...	Locked By	Actor Filter
JXP Accumu...	In Error	JXP - Accum...		Accumulate	4 months, 2 ...	4 months, 2 ...	05-23-2024, ...	05-23-2024, ...	Package res...		Unlocked	
JXP Anon W...	In Progress	JXP Anon W...	https://mbel...	HR Demo	4 months, 2 ...	4 months, 2 ...	05-21-2024, ...	05-21-2024, ...	HR Demo		Marcos Rodi...	
JXP Esg Wo...	In Progress	JXP Esg Wo...	KIP	ESign	7 months, 1 ...	7 months, 1 ...	02-29-2024, ...	02-29-2024, ...	Jason@gfue...		Unlocked	

Details

Package Details

- Name: JXP Anon Workflow Test Package
- Status: In Progress
- Workflow: JXP Anon Workflow Test
- Description: https://mbel.../isAnonymous=true&form/11518
- Current Step: HR Demo
- Time at Step: 4 months, 2 weeks
- Time in Workflow: 4 months, 2 weeks
- Workflow Started: 05-21-2024, 11:36 am
- Package Started: 05-21-2024, 4:41 pm
- Assigned To: HR Demo
- Error Messages:
- Locked By: Marcos Rodriguez
- Actor Filter:

Package Actions

-
-
-
- Disabled: No filter was set.

Package Attachments

Name	Date Uploaded	Attached By
------	---------------	-------------

Workflow details

Start → HR Demo → End

The user can change how search results are displayed on this page so that the list appears on the left side 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.

The screenshot shows the 'Workflow Monitor' interface. At the top, there's a search bar with 'jkip' and a 'Refresh' button. Below it is a table with columns: Name, Status, Workflow, Workflow..., Current St..., Time at C..., Time in W..., Date Wor..., Date Pack..., Assigned..., Error Mes..., Locked By, and Actor Filter. The table lists three packages: 'JXP Accumu...', 'JXP Anon W...', and 'JXP Sig Wor...'. To the right of the table is a 'Details' panel for the selected package 'JXP Anon W...'. It shows package details like Name, Status, Workflow, Description, Current Step, Time at Step, Time in Workflow, Workflow Started, Package Started, Assigned To, Error Messages, Locked By, and Actor Filter. Below this are 'Package Actions' (Unlock Package, Move Package, Reassign Actor, Reset Actor Filter) and 'Package Attachments'.

Toggle Icon to Change how Search Results are Viewed

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 users' packages.
 - a. A message will let the user know the Unlock was successful. When a package is not locked by a user or on a non-actor step, the Unlock Package button will be disabled.

This screenshot is similar to the previous one, but the 'Unlock Package' button in the 'Package Actions' section of the details panel is highlighted with a red box. The button is enabled, indicating the package is locked by a user or on an actor step.

Unlock Package Button within Package Search Results

2. MOVE PACKAGE | This action allows the user to change which step 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 it. The information that must be filled out includes selecting 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.

Move Package within Package Actions

If the package selected has a flow with a step UDR (User Direct Routing) Drilldown enabled, the Workflow Monitor can 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.

Move Action Toggle Display

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

- An e-sign package cannot be moved to an E-Sign step if the field housing the email address does not have a valid email address. When this occurs, the package can be moved backward 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 before 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.
- Only the fields used signatures at that current E-Sign step will be cleared when an E-Sign package is moved to or after an E-Sign step.
- Any prior links sent to the Signer Recipient will be invalid after the package has been moved.

Message Popup when Package is in an E-Sign Step.

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.

Select a User/Group/Role to assign the package(s) to

Select an actor to reassign to

Select a reason for Reassigning the package(s)

☐ Package(s) Incorrectly Routed

☐ User Out of Office

☐ Package(s) Stuck

☐ Inadvertently Sent

☐ Other

REASSIGN

CANCEL

Reassign Actor Option

When reassigning a package that 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 invalid (does not follow a standard email structure).

Enter email address to assign the package to

Email address of the intended signer

Select a reason for Reassigning the package(s)

☐ Incorrect/Invalid Email

☐ Different Signer Needed

☐ Other

REASSIGN

CANCEL

Email Address Text Box within Reassigning a Package

4. RESET ACTOR FILTER | A user can take an individual action on a package with 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 reset and a reason for the reset. If no actor filter was set in the Workflow, the Reset Actor Filter button will be deactivated, and the user cannot select it as an action.

Select a filter to reset to

Select actor filter

Select a reason for resetting the filter

☐ Incorrect Custom Property Assigned/Selected

☐ Missing Custom Property for User

RESET

CANCEL

Reset Actor Filter

5. INACTIVE WORKFLOW ACTIONS | When a Workflow is inactive, individual actions such as reassigning and moving can still be performed.
6. VIEW INDIVIDUAL PACKAGE ITEMS | A user, with the appropriate permissions, can view individual package items

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Workflow Monitor

Package Refresh

Filters

Name	Status	Workflow	Workflo...	Current ...	Time at ...	Time in ...	Date Wo...	Date Pa...	Assigne...	Error Me...	Locked By	Actor Fil...
Add/Drop ...	In Progress	Central - A...		Registrar	3 weeks, 0...	3 weeks, 0...	03-19-20...	03-19-20...	Registrar		Unlocked	
Add/Drop ...	In Progress	Central - A...		Registrar	3 weeks, 0...	3 weeks, 0...	03-19-20...	03-19-20...	Registrar		Unlocked	

Display

Details | **Package Items**

Package Details

- Name : Add/Drop Request -
- Status : In Progress
- Workflow : Central - Add Drop Workflow
- Description :
- Current Step : Registrar
- Time at Step : 3 weeks, 0 days
- Time in Workflow : 3 weeks, 0 days
- Workflow Started : 03-19-2025, 10:47 am
- Package Started : 03-19-2025, 10:47 am
- Assigned To : Registrar
- Error Messages :
- Locked By : Unlocked
- Actor Filter :

Workflow details

```

graph LR
    Start([Start]) --> Registrar[Registrar]
    Registrar --> End([End])
  
```

Individual Package Items Viewer

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Workflow Monitor

Package Refresh

Filters

Name	Status	Workflow	Workflo...	Current ...	Time at ...	Time in ...	Date Wo...	Date Pa...	As:
Add/Drop ...	In Progress	Central - A...		Registrar	3 weeks, 0...	3 weeks, 0...	03-19-20...	03-19-20...	Reg
Add/Drop ...	In Progress	Central - A...		Registrar	3 weeks, 0...	3 weeks, 0...	03-19-20...	03-19-20...	Reg

Details | **Package Items**

Package Items

- JKP Add/Drop

Add/Drop Option within Package Items

Batch Actions

At the top of the page, above search results, there is a dropdown menu that allows users to perform actions for multiple workflows at once. When the user selects an option from the dropdown, checkboxes prompt them to select the appropriate packages.

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Workflow Monitor

Package Refresh

Filters

Batch Actions Button

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Workflow Monitor

Package

Q a

Refresh

Filters

Cancel

Move Selected

Select one or more of the packages below to Move: 0 selected

	Name	Status	Workfl...	Workfl...	Curre...	Time ...	Time L...	Date ...	Date P...	Assign...	Error ...	Lock
☒	DEMO ...	In Progr...	_DEMO ...		Start	4 seconds	3 month...	06-28-2...	10-08-2...	Erika Yu...		Unlo
☐	DEMO ...	In Error	_DEMO ...		Approve...	3 weeks...	3 month...	06-28-2...	09-11-2...		We have...	Unlo
☐	DEMO ...	In Error	_DEMO ...		Approve...	3 weeks...	3 month...	06-10-2...	09-11-2...		We have...	Unlo
☐	DEMO ...	In Progr...	_DEMO ...		Depart...	2 month...	2 month...	07-16-2...	08-06-2...	Erika Yu...		Erika
☐	DEMO ...	In Progr...	_DEMO ...		Depart...	2 month...	4 month...	05-29-2...	08-02-2...	Clinton ...		Clint
☐	DEMO ...	In Progr...	_DEMO ...		Depart...	2 month...	3 month...	07-08-2...	07-28-2...	Lena Ma...		Lena
☐	DEMO ...	In Progr...	_DEMO ...		Depart...	2 month...	2 month...	07-28-2...	07-28-2...	FLOW-D...		David

Details

Package Actions

Unlock Package

Disabled: Package is unlocked.

Move Package

Reassign Actor

Disabled: Currently at non-actor step.

Reset Actor Filter

Disabled: No filter was set.

Package Attachments

Department 8

Batch Actions Results

By utilizing the search results filtering feature, users can move one or more packages—through batch actions—from the list of results within a single workflow to a different step of the same workflow.

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

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 of 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 originators who have submitted documents separately cannot be moved. Finally, packages cannot be moved if their workflow is inactive.