iChannel Workflows

iChannel **Workflows** is the execution and automation (iChannel Customization) of business processes; where task, information and documents are passed from one person to another for action according to a set of procedural rules. Workflows involves work by one or more users, and transforms materials, information, or services.

By defining workflows, you are creating a sequence of tasks that processes a set of data. Workflows occur across every kind of business and industry. Anytime data is passed between users and/or systems, a workflow is created. Workflows will help an organization to streamline and automate repeatable business tasks, minimizing room for errors and increasing overall efficiency.

Workflows are highly configurable to meet many different business processes. To learn more about Customized Workflows, please contact your iChannel Implementation Representative

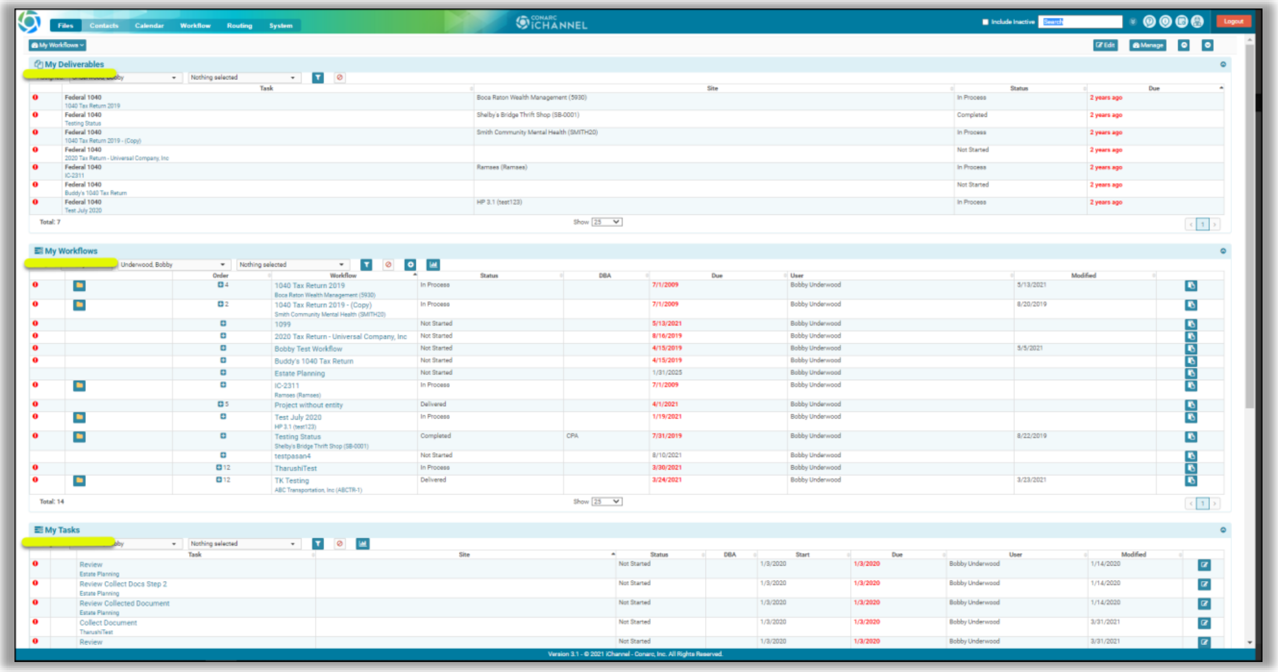
iChannel Dashboard – Workflow Widgets

It is recommended when working with iChannel Workflows, to configure iChannel Dashboard with widgets to have manage your Task, Workflows and Deliverables. The below table outlines the widgets related to working with workflows.

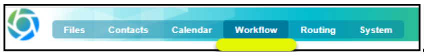
Workflows	**My Deliverables**	This widget is for users of the Workflow Module that are using the Custom Deliverable grid. Displays the Deliverables and due dates for the Workflows you are assigned to. Each Deliverable will be associated to a status to show their progress. **RED** – overdue. **YELLOW** – on-hold. **GREEN** – in-progress.
	My Workflows	My Workflows (Workflows) display all the workflows where the user is listed as the "primary" contact person. Tasks are listed by the order number. Viewable information includes the Workflow name, due date and any assigned Workflows. Sites listed for the workflow are also displayed in the widget. Each Workflow will be associated to a status to show their progress. **RED** – overdue. **YELLOW** – on-hold. **GREEN** – in-progress.
	My Tasks	Display a user's designated tasks that have not been completed. Clicking on the checkmark icon (far right) will mark the task as "Complete". Use the Assigned drop-down list to see other users assigned Tasks, Sites listed within the widget.

To learn more about how to Customize your dashboard with workflow widgets, please reference:

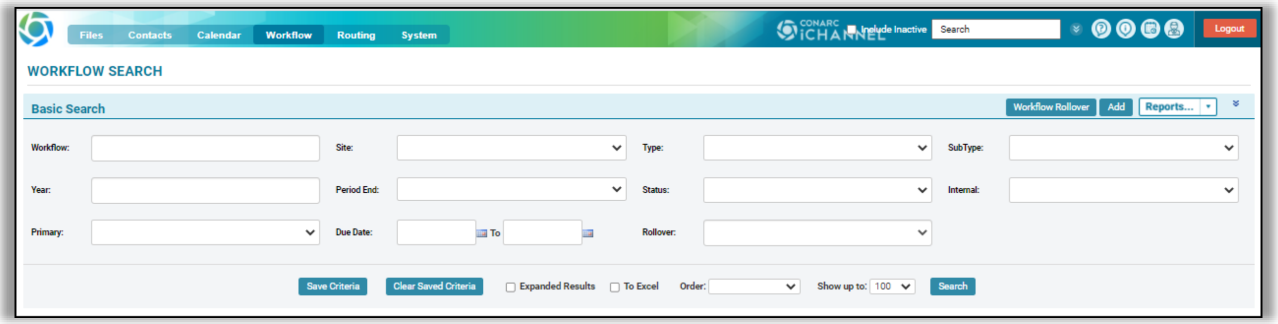
- IC-100 Getting to Know iChannel and iChannel Dashboard module.

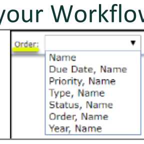
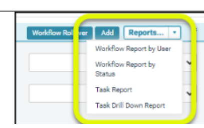


iChannel Workflow Search Screen

From the **Main Banner**, *click* 

. The **Workflow Search** screen *will display*. From the Workflow Search screen users can search for Workflows and task by identifying advanced search options in any of the fields.



Workflow Search Fields	**Workflow**	This field allows a user to *search* for a **Workflow by name**. Use the checkbox to add the additional search for **Begins with..** to the search for names that begin with your search criteria.
	Status	*Click* the **Status drop-down arrow** to select a status search criteria. This field is highly customizable; please contact your System IT Administrator to learn more.
	Site	*Click* the **Site drop-down arrow** to select an Site. *Hold down* the **Shift** or **ctrl** keys to select multiple entities. To *search for all entities*, leave the field **blank**.
	Internal	Click the **Internal drop-down arrow** to search for a list of contacts for the Workflows. *Hold down* the **Shift** or **ctrl** keys to select multiple contacts. To *search for all internal contacts,* leave the field **blank**.
	Type	*Click* the **Type drop-down arrow** to select a type search criteria. This field is highly customizable; please contact your System IT Administrator to learn more.
	Primary	*Click* the **Primary drop-down arrow** to select a contact identified as a primary contact for a Workflow.
	Sub Type	*Click* the **SubType drop-down arrow** to select a subtype search criteria. This field is highly customizable; please contact your System IT Administrator to learn more.
	Due Date **End Date**	To search for workflows between a **Due Date** range, *click* the **date-pickers** to set dates.
	Year	To search for workflows for a particular **Year**, *enter* a **four-digit (XXXX) year**.
	Period End	To search for a workflow for a particular **Period End**, *click* the **drop-down list** and *select* a period.
	Rollover	To search for a workflow by **Rollover**, *click* the **drop-down list** and *select* either **Yes** or **No**.
	Save Criteria **Clear Saved Criteria**	*Click* the **Save Criteria** button to save the Workflow search fields entries for future searches. This is useful when repeatedly searching for the same type of Workflow or doing repetitive searches *Click* the **Clear Saved Criteria** to clear any saved search criteria.
	Expanded Results	*Check* **Expanded Results** to *show* **Notes** in your Workflow Search.
	To Excel	*Check* **To Excel** to create a spreadsheet from your Workflow Search.
	Order	*Click* the **Order drop-down** list to *select* 
	Show up to	*Click* the **Show up to drop-down** list to select the number of results to show in the Workflow Search results.
	Reports	*Click* the **Reports drop-down** list to select a Workflow Report to generate. 

Workflow: How to Add a New Workflow

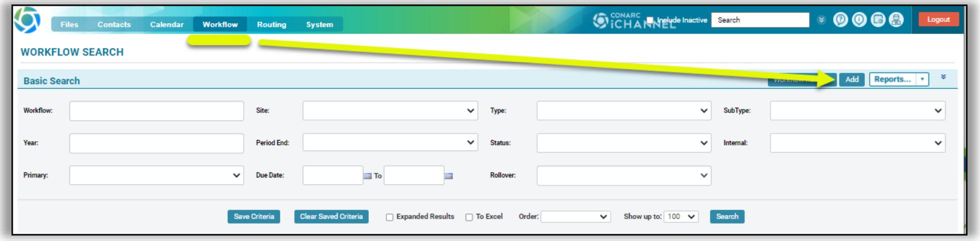
There are *four basic steps* when creating a new **Workflow**:

1. **Create a Workflow** (1-time workflow vs. pre-defined workflow templates)
2. **Assign to a Site**
3. **Assign Contacts**
4. **Identify and Assign Task(s) to Contacts**

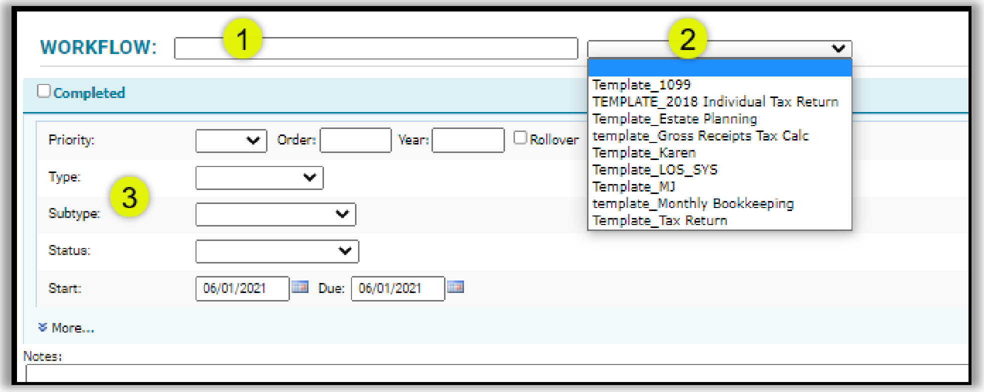
Please contact your System IT Administrator or iChannel Implementation Representative to learn more about "**working with Workflow TEMPLATES_**"

Workflows – How to Create a Workflow

Step	Action
Workflow	*Select* **Workflows** from the **Main banner**. The *Workflow Search window displays*. *Click* **Add**.



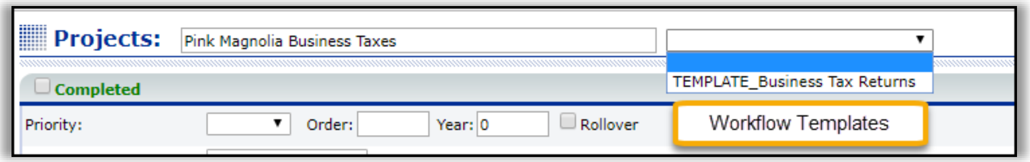
The **Workflows** screen will display.



1

Create a Workflow (1-time workflow vs. pre-defined workflow templates).

1. **Workflow** – in the Workflow name field, *enter* a descriptive **Workflow Name** to identify the workflow (Workflow).
2. If creating a new Workflow (Workflow) using a **Pre-defined Workflow (Workflow) TEMPLATE_**, *select* the **drop-down arrow** and *select* a "**TEMPLATE_**" from the list.
   - **NOTE:** to use a pre-defined workflow "TEMPLATE_", the template must have been created in advance.
   - **NOTE:** All predefined templates must start with: "**Template_**XXXXXX".



3. **Workflow Details**

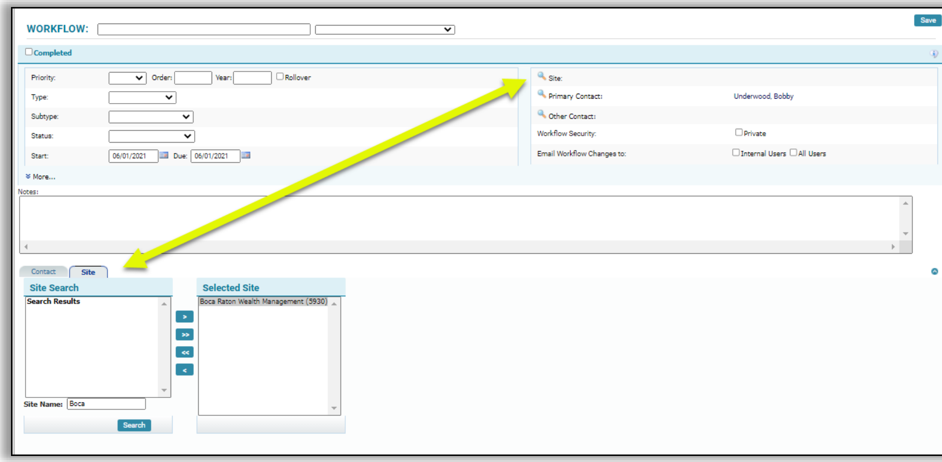
- **Priority** – Assign the priority level by clicking the drop-down arrow.
- **Order** – field allows you to define a display order for the workflow (Workflow) on your dashboard.
- **Year** – field allows the user to define the year for the workflow (Workflow). (i.e. 2018, 2019)
- **Type** – assign the type identifier for the workflow (Workflow).

- **Subtype** – assign the subtype identifier for the workflow (Workflow).
- **Status** – assign the current status the workflow (Workflow). (i.e., Not Started, In Progress, Completed).
- **Start | Due** – assign the start date and due date for the workflow (Workflow).
- **Notes (optional)** – enter notes related to the workflow (Workflow)

2

Click the **Site tab** or *click* Site to begin a search for a Site to assign to the workflow.
To *view* all available entities in the **Site Search** results, *click* the **Search button**.

Double-click the **Site** or use the **quick action buttons** > >> << < to *add* or *remove* Sites to the **Selected Site** area.



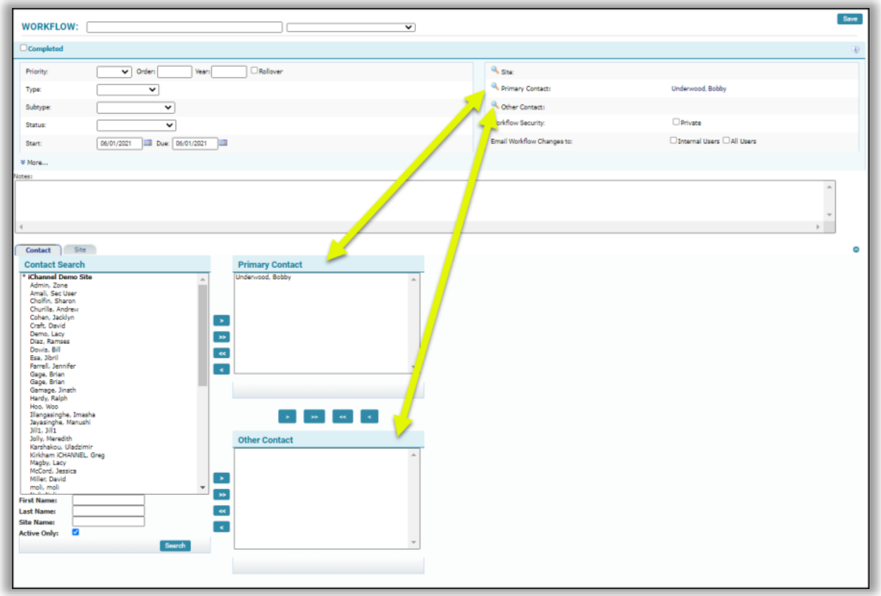
3

Click the **Contact tab** or *click* Primary Contact: to begin a search for a contact(s) to assign contact(s) to the new workflow.

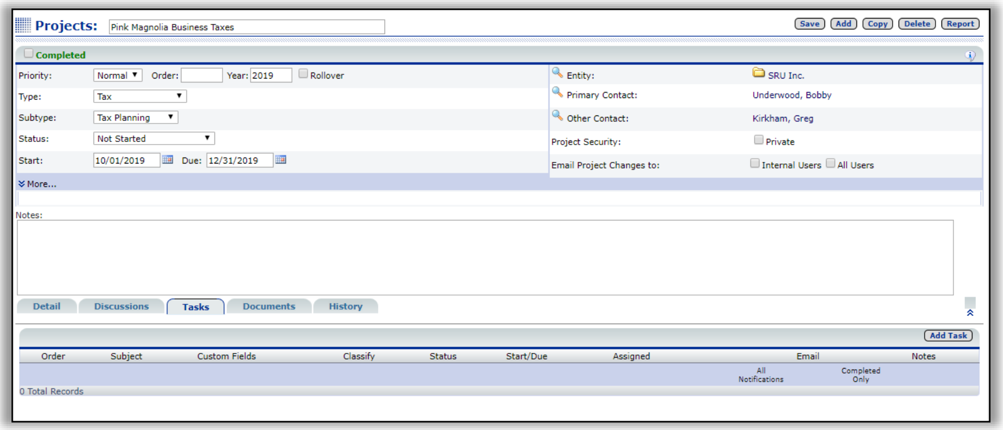
Available Contacts will display in the **Contact Search** area. To perform a detailed search for a contact, *enter* **specific values** in the: **First Name, Last Name, Site Name or Active Only**.

Users can add additional contacts to the workflow (Workflow) by selecting contact(s) and adding to the **Other Contact** area.

Double-click the **Contact(s)** or use the **quick action buttons** > >> << < to *add* or *remove* Contact(s) to the **Primary Contact or Other Contact** area.



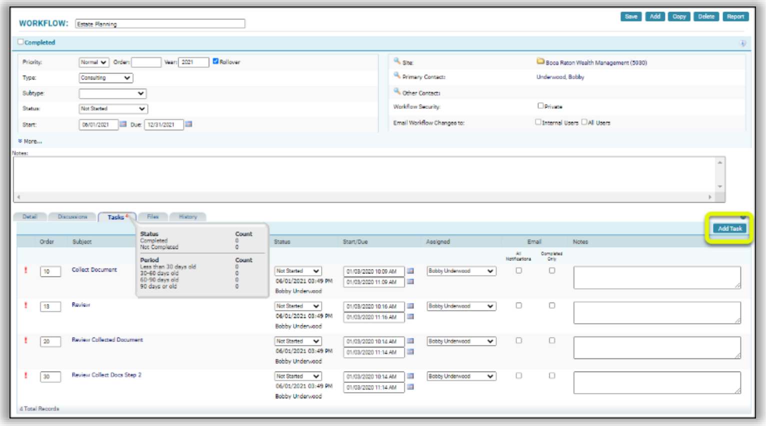
Before **Identifying and Assigning Task(s)** to the Workflow, **Save the Workflow**.



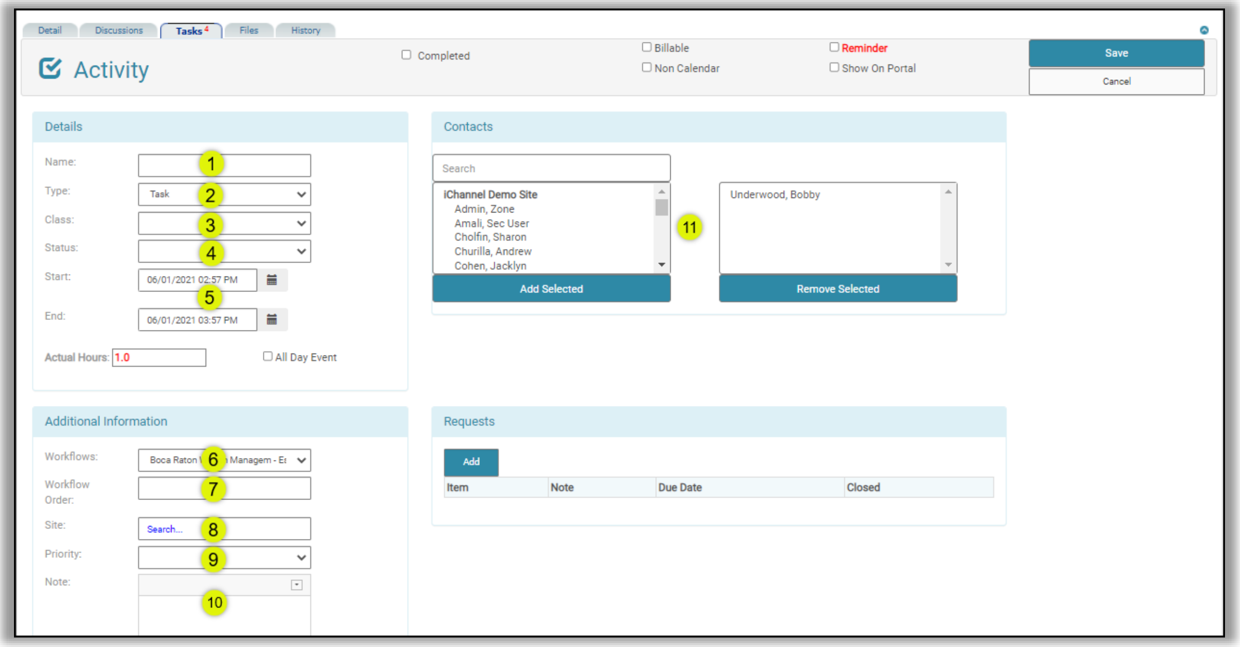
The final step in creating a new Workflow (Workflows) is to **Identify** and **Assign Task(s)** to the Workflow (Workflows) | Contact(s).

4

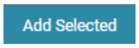
Click the **Tasks** tab, *click* **Add Task**.

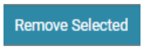


The **Activity** window will display.



1. **Name** – *enter* the **Name** of the Workflow (Workflow) Activity.
2. **Type** – *by default*, **Task** will populate in the **Type** field.
3. **(Optional) Class** – *select*, if applicable, a **Class** type from the drop-down list.
4. **Status** – click the drop-down arrow to define the status.
5. **Start | End Date** – *select* the **Date Icon** to enter the start date and end date for the requested Activity. If the activity is all-day event, *select* the **All Day Event checkbox**.
6. **Workflow** – *by default*, the name of the Workflow (Workflow) will display. If the Workflow needs to be assigned to a different Site (Site), click the drop-down arrow and select.
7. **Workflows Order** – this field determines the order for the Task(s) in your workflow (Workflow).
    - **NOTE:** it is recommended to order your Task(s): 10, 20, 30, etc. This allows the user to add "new task" when needed.
    - **NOTE:** if the Workflows Order is not defined, the Task will default to "999"

8. **Site** – *click* in the **Search** field and locate the Site (Site) to assign the Task.
9. **(Optional) Priority** – this optional field can be: **Blank**, **High**, **Medium**, or **Low**.
10. **(Optional) Note** – enter any notes that are related to the Task.
11. **Contacts** –
    - *Highlight* a contact from the pre-populated contact list, *click* 

    - *Highlight* a contact from the removed selected section, *click* 

Tool Tip:

Double-click a Contact to **Add** a contact *Double-click* to **Remove** a contact from the Remove Selected section

To *select multiple* **Contacts**, hold down the **Ctrl key** and *select* **Contacts**

Click Save. *Repeat* **Step 4** until all the Task(s) associated with the Workflow (Workflow) have been defined.

Tool Tip:

All Notifications – if you are listed as a *Primary Contact* or *Secondary Contact* on a Workflow and **All Notifications** is checked. The contact(s) will receive notification when there is "*any*" change made to the Task. (I.e., Status, Assigned, etc.)

Completed Only – if you are listed as a *Primary Contact* or *Secondary Contact* on a Workflow and **Completed Only** is checked. The contact(s) will "*only*" receive notification when the Status for the Task is set to "Completed".

- To Copy an existing workflow, *click* the **Copy** button.
- To Delete an existing workflow, *click* the **Delete** button.
- To review reports related to a Workflow, *click* the **Report** button.