

# WORKFLOW LIST MAINTENANCE

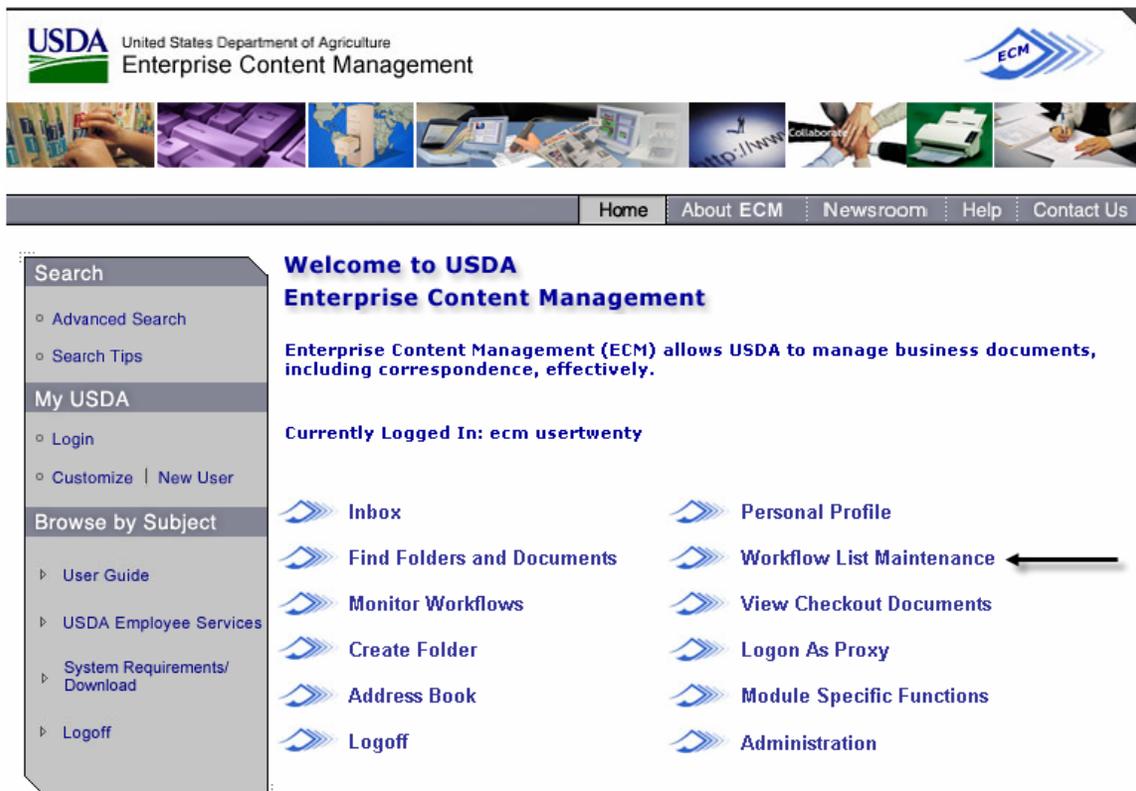
WORKFLOW LIST MAINTENANCE

ADD WORKFLOW LIST

CANCEL

# WORKFLOW LIST MAINTENANCE

To add or change Workflow Lists, the user selects Workflow List Maintenance from the Main Menu as seen in **Figure 1**. Workflow Lists are standard workflows that may be used often by users.



**Figure 1: Main Menu – Workflow List Maintenance**

When setting up the folder, a user can add a standard workflow list to the Workflow tab rather than creating one each time. Workflow lists are also created to be associated with a processing code as the default workflow for that processing code.

The system allows Personal or Group workflow lists to be created. Personal workflow lists are created by a user to use for their own folders. They are not available for other users to access.

Group workflow lists are stored in the system by group. They are available for all users to access and use. A group workflow list can only be added or changed by an Administrator for the group or a group member with ‘Create Workflows’ privileges.

The Workflow List Maintenance screen is shown in **Figure 2**.

**Figure 2: Workflow List Maintenance**

## ADD WORKFLOW LIST

To add a new workflow list, the user:

- Clicks the ‘Add New’ radio button

- Enters the 'List Name' for the new workflow - The List Type can be 'Group' or 'Personal'. If Group, the user must pick a group for the list. The Group defaults to the user's Default Group. The user clicks the <Select Group> to change it. To create a workflow for a group, the user must have Create Workflow privilege for the Group (or be an Administrator for it or one of its Parent Groups).
- The module will be the user's default module

Figure 3 shows the Workflow List Maintenance screen at this point.

Figure 3: Workflow List Maintenance Screen

### Workflow Editor Menus

The functions within the Workflow Editor can be broken down into the various menus. In the middle of the screen are three options as shown in Figure 4.

## Figure 4: Workflow Editor Options

### 1. Due DateType:

- **Floating:** A task is assigned a certain number of days to be completed. The countdown of days does not begin until the previous task has been completed and the next task has been received by the next user.
- **Fixed:** The task has a set due date no matter when the task has been received by the current user. A task may already be past due when it is received.

### 2. Subflow Return to Assignee:

- **Allow Subflow Creator to Select:** The creator of the subflow may choose whether or not the task is to be returned.
- **Return Required – Disable Selection:** The subflow must automatically be returned to the assignee. A separate task is generated to the subflow to accomplish this.

3. Notify Owner When Workflow is Complete: When checked the folder owner is notified when the workflow is completed.

## Task Menu

The Task Menu is shown in **Figure 5**.



**Figure 5: Task Menu**

1. Add: The <Add> button allows the user to add a task to an existing workflow or to create a workflow. Upon clicking the <Add> button the 'Add/Change Task' screen is displayed as seen in **Figure 6**.

**Add/Change Task**

Task:

**Assignee:** **Type:**

**User/Position:**

**Group:**

Parent Groups	Mission/Staff	Agency	Division

**Floating Days to Complete:**

**Due Date:**

**Approval**

Not Required

Required

**Notification**

Notify When Task is Complete

**Informational**

Yes

No

**Figure 6: Add/Change Task**

The user may choose an existing task from the drop-down task box as shown in **Figure 7** or type in a task in the text box directly below the drop-down.

**Add/Change Task**

Task:

**Assignee:**

**User/Position:**

**Group:**

**Floating Days to Complete:**

**Due Date:**

**Approval**

Not Required

Required

**Notification**

Notify When Task is Complete

**Informational**

Yes

No

**Figure 7: Add/Change Task – Drop-down**

Click on <Select Assignee>, and choose the assignee from the List View (**Figure 8**) or the Tree View (**Figure 9**).

**Select Assignee List View** Tree View

Mission/Staff: Rural Development  
Agency: None  
Division: None Show Groups/Positions ⬆️ Less

Parent Groups  
None

**Groups** Positions  
Main Group

Level Down Level Up

Find Group:  Go

**Select Group/Position** Aliased

**Users** Display

Show Groups for User  Go

Find User:  Go

**Select User**

Cancel

**Figure 8: Select Assignee – List View**

**Select Assignee Tree View** List View

- [-] MS Office of the Secretary
  - + MS Office of the Chief Information Officer
  - + MS Office of the Chief Financial Officer
  - + MS National Appeals Division
  - [-] MS Rural Development
    - + A Correspondence Branch
    - + A kathys Agency
    - [-] A None
      - [-] D None
        - [-] G Main Group
          - P CMAgency
          - + P Confidential Assistant to the Under Secretary
          - + G Correspondence Branch RHS RBS
          - + G Correspondence Control Officer
          - + G Legislative and Public Affairs Staff
          - G MFCAgency
          - + G Operations and Management
          - + G Policy and Planning
          - + P Secretary
          - + P Under Secretary
            - Administrator, ECMM
            - Anderson, Kathy

**Select** Aliased Cancel

**Figure 9: Select Assignee – Tree View**

The example in **Figure 10** asks for ‘Floating Days to Complete’. If the user had indicated that a Fixed Due Date Type was required in the Workflow Editor screen, a date would be required here.

The user indicates whether or not Approval is required to complete the task, whether or not the folder owner wants to be notified when the task has been completed, and whether or not the task is Informational. A task that is ‘Informational’ does not need to be completed.

**Add/Change Task**

Task:

Assignee: Group      Type: Standard

User/Position:

Group: Main Group      **Select Assignee**

Parent Groups	Mission/Staff	Agency	Division
None	Rural Development	None	None

Floating Days to Complete:

Due Date:

**Approval**

Not Required  
 Required

**Notification**

Notify When Task is Complete

**Informational**

Yes  
 No

**Save & Return**      **Cancel**

**Figure 10: Add/Change Task**

When the user has finished creating the task, she clicks <Save & Return> and is returned to the Workflow Editor as shown in **Figure 11** where additional functions may be performed to complete the workflow.

<b>Due Date Type:</b> <input checked="" type="radio"/> Floating <input type="radio"/> Fixed		<b>Subflow Return to Assignee?</b> <input type="radio"/> Allow Subflow Creator to Select <input type="radio"/> Return Required - Disable Selection			<input type="checkbox"/> Notify Owner When Workflow is Complete				
#	Task	Received	Due Date	A	Organization	Assignee	Status	Completed	Organiz
1	Research		09/21/2006		OSEC/RD/None/...	Main Group	Not Started		
Remarks:									
<b>Workflow List</b> <input type="button" value="Insert from Library"/> <input type="button" value="Save to Library"/>		<b>Task</b> <input type="button" value="Add"/> <input type="button" value="Move Up"/> <input type="button" value="Copy"/> <input type="button" value="Insert"/> <input type="button" value="Move Down"/> <input type="button" value="Edit Details"/> <input type="button" value="Remove"/> <input type="button" value="Remove All"/> <input type="button" value="Make Parallel"/>			<input type="button" value="Update &amp; Return"/> <input type="button" value="Cancel"/>				

**Figure 11: Workflow Editor – Task Added**

2. Insert – This button allows the user to easily insert a task to the workflow. The user highlights the task that resides where the inserted task will be placed(**Figure 12**) and clicks <Insert>.

<b>Due Date Type:</b> <input checked="" type="radio"/> Floating <input type="radio"/> Fixed		<b>Subflow Return to Assignee?</b> <input type="radio"/> Allow Subflow Creator to Select <input type="radio"/> Return Required - Disable Selection			<input type="checkbox"/> Notify Owner When Workflow is Complete				
#	Task	Received	Due Date	A	Organization	Assignee	Status	Completed	Organiz
1	Research		09/21/2006		OSEC/RD/None/...	Main Group	Not Started		
2	Assumptions/Transfers		10/05/2006		OSEC/RD/None/...	Main Group	Not Started		
3	Approve Application		10/06/2006		OSEC/RD/None/...	Main Group	Not Started		
4	Award Grant		10/23/2006		OSEC/RD/None/...	Main Group	Not Started		
5	Notify Borrower		10/25/2006		OSEC/RD/None/...	Main Group	Not Started		

Remarks:

<b>Workflow List</b> <input type="button" value="Insert from Library"/> <input type="button" value="Save to Library"/>	<b>Task</b>			<input type="button" value="Update &amp; Return"/> <input type="button" value="Cancel"/>
	<input type="button" value="Add"/>	<input type="button" value="Move Up"/>	<input type="button" value="Copy"/>	
	<input type="button" value="Insert"/>	<input type="button" value="Move Down"/>	<input type="button" value="Edit Details"/>	
	<input type="button" value="Remove"/>	<input type="button" value="Remove All"/>	<input type="button" value="Make Parallel"/>	

**Figure 12: Insert Task**

The 'Add/Change Task' screen will be displayed. The task to be inserted is created in the same manner as has been shown in the 'Add Task' function. The completed screen is shown in **Figure 13**.

### Add/Change Task

**Task:** Add Final to Folder ▼

---

**Assignee:** Group **Type:** Standard

**User/Position:**

**Group:** Main Group **Select Assignee**

Parent Groups	Mission/Staff	Agency	Division
None	Rural Development	None	None

---

**Floating Days to Complete:**

**Due Date:**

**Notification**

Notify When Task is Complete

**Approval**

Not Required

Required

**Informational**

Yes

No

**Save & Return**
**Cancel**

**Figure 13: Add/Change Task – Create Task to be Inserted**

After <Save & Return> is clicked the user is returned to the Workflow Editor showing the inserted task (**Figure 14**).

<b>Due Date Type:</b> <input checked="" type="radio"/> Floating <input type="radio"/> Fixed		<b>Subflow Return to Assignee?</b> <input type="radio"/> Allow Subflow Creator to Select <input type="radio"/> Return Required - Disable Selection			<input type="checkbox"/> Notify Owner When Workflow is Complete				
#	Task	Received	Due Date	A	Organization	Assignee	Status	Completed	Organiza
1	Research		09/21/2006		OSEC/RD/None/...	Main Group	Not Started		
2	Assumptions/Transfers		10/05/2006		OSEC/RD/None/...	Main Group	Not Started		
3	Add Final to Folder		10/06/2006		OSEC/RD/None/...	Main Group	Not Started		
4	Approve Application		10/09/2006		OSEC/RD/None/...	Main Group	Not Started		
5	Award Grant		10/24/2006		OSEC/RD/None/...	Main Group	Not Started		
6	Notify Borrower		10/26/2006		OSEC/RD/None/...	Main Group	Not Started		

Remarks:

<b>Workflow List</b> <input type="button" value="Insert from Library"/> <input type="button" value="Save to Library"/>		<b>Task</b> <input type="button" value="Add"/> <input type="button" value="Move Up"/> <input type="button" value="Copy"/> <input type="button" value="Insert"/> <input type="button" value="Move Down"/> <input type="button" value="Edit Details"/> <input type="button" value="Remove"/> <input type="button" value="Remove All"/> <input type="button" value="Make Parallel"/>			<input type="button" value="Update &amp; Return"/> <input type="button" value="Cancel"/>	
--	--	--	--	--	---	--

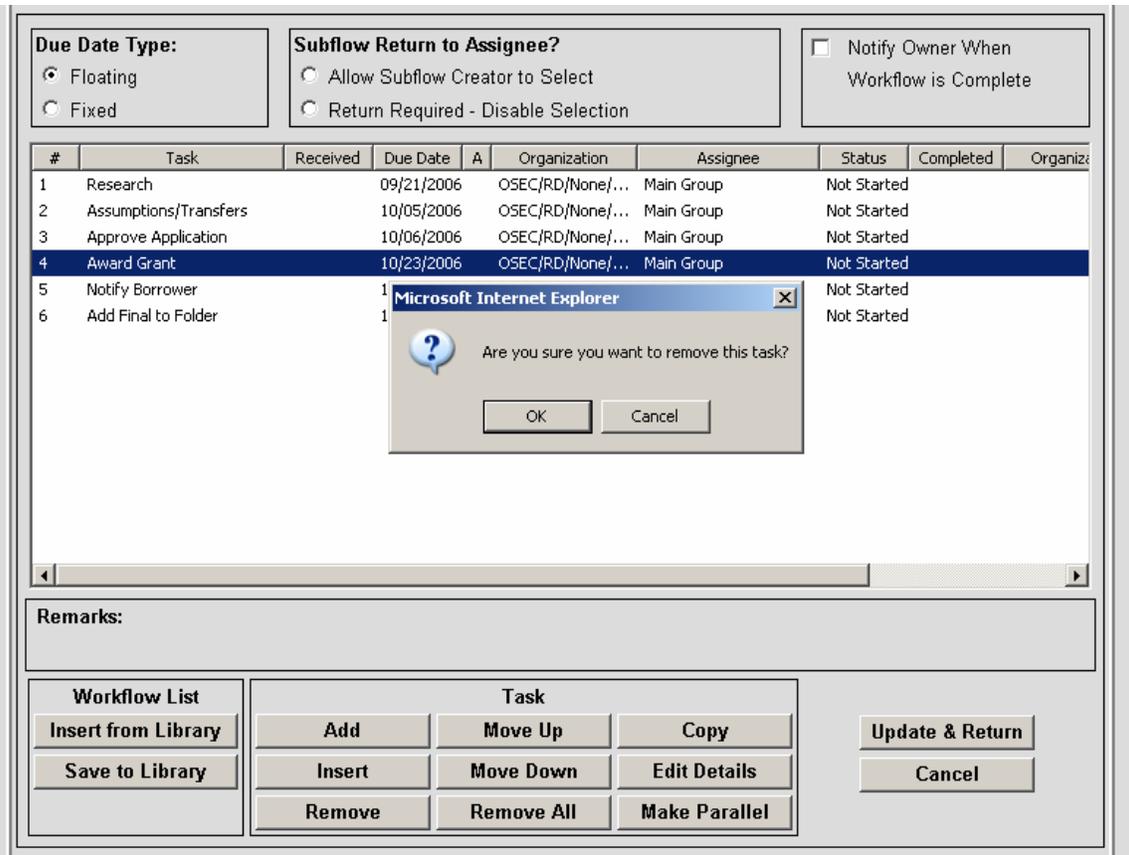
**Figure 14: Workflow Editor with Inserted Task Highlighted**

3. Remove: Tasks where the status is 'Not Started' or 'Put Back' can be removed from the workflow. The user highlights the task to be removed as shown in **Figure 15** and clicks <Remove>.

<b>Due Date Type:</b> <input checked="" type="radio"/> Floating <input type="radio"/> Fixed		<b>Subflow Return to Assignee?</b> <input type="radio"/> Allow Subflow Creator to Select <input type="radio"/> Return Required - Disable Selection			<input type="checkbox"/> Notify Owner When Workflow is Complete				
#	Task	Received	Due Date	A	Organization	Assignee	Status	Completed	Organiz
1	Research		09/21/2006		OSEC/RD/None/...	Main Group	Not Started		
2	Assumptions/Transfers		10/05/2006		OSEC/RD/None/...	Main Group	Not Started		
3	Approve Application		10/06/2006		OSEC/RD/None/...	Main Group	Not Started		
4	Award Grant		10/23/2006		OSEC/RD/None/...	Main Group	Not Started		
5	Notify Borrower		10/25/2006		OSEC/RD/None/...	Main Group	Not Started		
6	Add Final to Folder		10/26/2006		OSEC/RD/None/...	Main Group	Not Started		
<b>Remarks:</b> 									
<b>Workflow List</b> <input type="button" value="Insert from Library"/> <input type="button" value="Save to Library"/>		<b>Task</b> <input type="button" value="Add"/> <input type="button" value="Move Up"/> <input type="button" value="Copy"/> <input type="button" value="Insert"/> <input type="button" value="Move Down"/> <input type="button" value="Edit Details"/> <input type="button" value="Remove"/> <input type="button" value="Remove All"/> <input type="button" value="Make Parallel"/>						<input type="button" value="Update &amp; Return"/> <input type="button" value="Cancel"/>	

**Figure 15: Remove Task**

The application will ask the user to verify that the task should be removed as shown in **Figure 16**.



**Figure 16: Verify Removal of Task**

The Workflow Editor screen is refreshed to show the revised workflow as seen in **Figure 17**.

<b>Due Date Type:</b> <input checked="" type="radio"/> Floating <input type="radio"/> Fixed		<b>Subflow Return to Assignee?</b> <input type="radio"/> Allow Subflow Creator to Select <input type="radio"/> Return Required - Disable Selection			<input type="checkbox"/> Notify Owner When Workflow is Complete				
#	Task	Received	Due Date	A	Organization	Assignee	Status	Completed	Organiza
1	Research		09/21/2006		OSEC/RD/None/...	Main Group	Not Started		
2	Assumptions/Transfers		10/05/2006		OSEC/RD/None/...	Main Group	Not Started		
3	Approve Application		10/06/2006		OSEC/RD/None/...	Main Group	Not Started		
4	Notify Borrower		10/10/2006		OSEC/RD/None/...	Main Group	Not Started		
5	Add Final to Folder		10/11/2006		OSEC/RD/None/...	Main Group	Not Started		

Remarks:

<b>Workflow List</b> Insert from Library Save to Library	<b>Task</b>			Update & Return Cancel
	Add	Move Up	Copy	
	Insert	Move Down	Edit Details	
	Remove	Remove All	Make Parallel	

**Figure 17: Remove - Revised Workflow**

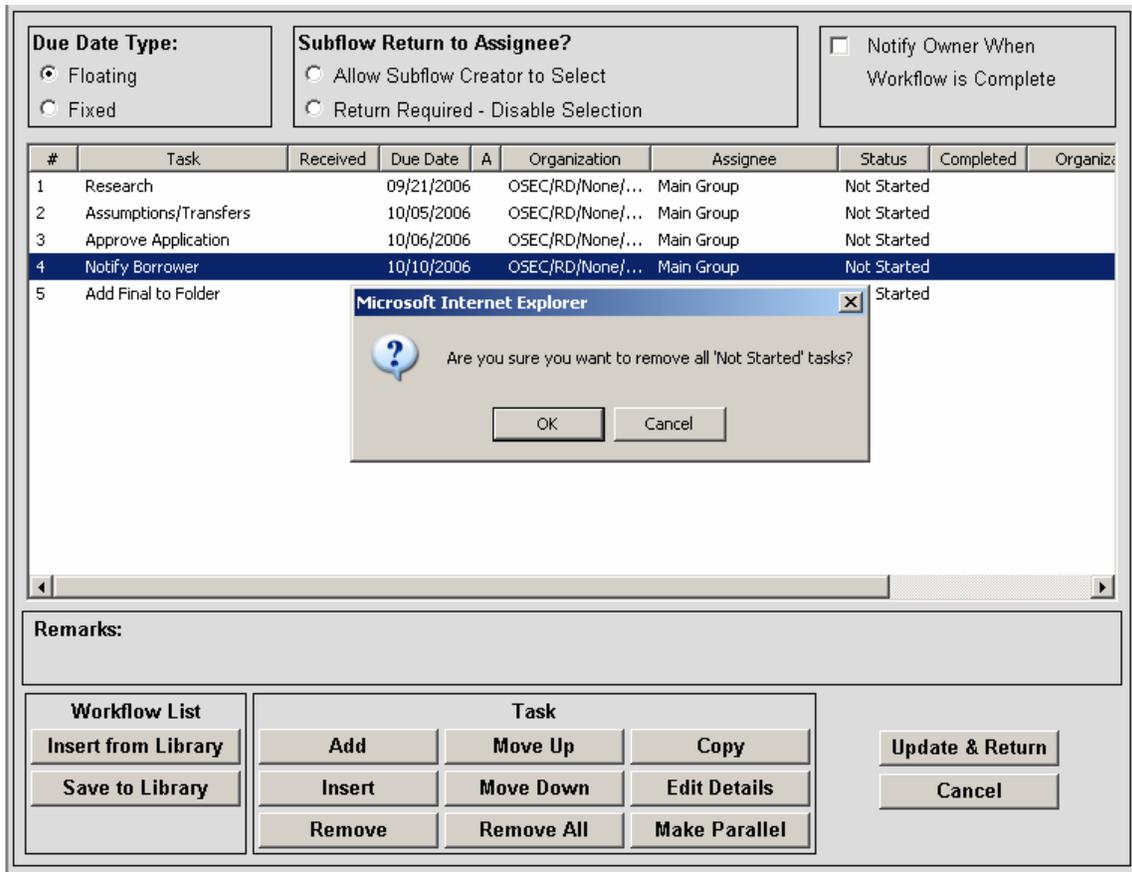
**The removal can still be canceled by clicking the <Cancel> key. The removal is confirmed by clicking <Update & Return>.**

4. **Move Up:** Tasks can be moved up within the workflow by highlighting the task and clicking the <Move Up> key. All tasks are then renumbered.

5. **Move Down:** Tasks can be moved down within the workflow by highlighting the task and clicking the <Move Down> key. All tasks are then renumbered.

6. **Remove All:** This key allows the user to remove all unstarted tasks. Only tasks with a status of 'Not Started' can be removed with the <Remove All> key.

The screen in **Figure 18** shows the Workflow Editor with the Pop-up asking the user to verify that all 'Not Started' tasks are to be removed.



**Figure 18: Remove All – Verification Pop-up**

After clicking <Ok>, the Workflow Editor is refreshed to show that the tasks have been removed as shown in **Figure 19**.

<b>Due Date Type:</b> <input checked="" type="radio"/> Floating <input type="radio"/> Fixed		<b>Subflow Return to Assignee?</b> <input type="radio"/> Allow Subflow Creator to Select <input type="radio"/> Return Required - Disable Selection			<input type="checkbox"/> Notify Owner When Workflow is Complete					
#	Task	Received	Due Date	A	Organization	Assignee	Status	Completed	Organiza	
Remarks:										
<b>Workflow List</b> <input type="button" value="Insert from Library"/> <input type="button" value="Save to Library"/>		<b>Task</b> <input type="button" value="Add"/>			<input type="button" value="Move Up"/> <input type="button" value="Move Down"/> <input type="button" value="Remove All"/>			<input type="button" value="Copy"/> <input type="button" value="Edit Details"/> <input type="button" value="Make Parallel"/>		<input type="button" value="Update &amp; Return"/> <input type="button" value="Cancel"/>

**Figure 19: Remove All**

**The removal can still be canceled by clicking the <Cancel> key. The removal is confirmed by clicking <Update & Return>.**

7. Copy: The user can copy a task and then insert it back into the Workflow.

Highlight the task to be copied and click <Copy>, then Click <Insert>. The Pop-up in **Figure 20** will be displayed.

#	Task	Received	Due Date	A	Organization	Assignee	Status	Completed	Organiz
1	Set Up Folder	10/27/2005	10/31/2005		OSEC/OES/None...	Main Group	Started		OSEC/OES/
2	Preparation		11/01/2005		OSEC/RD/RBS/N...	Correspondence Cont...	Not Started		
3	Signature		11/08/2005		OSEC/RD/RBS/N...	Correspondence Cont...	Not Started		
4	Signature Verification		11/09/2005		OSEC/OES/None...	Main Group	Not Started		

Microsoft Internet Explorer

 Do you want to insert the copied task? Select Cancel to insert a new task.

Remarks:

<b>Workflow List</b>	<b>Task</b>			
<input type="button" value="Insert from Library"/>	<input type="button" value="Add"/>	<input type="button" value="Move Up"/>	<input type="button" value="Copy"/>	<input type="button" value="Update &amp; Return"/>
<input type="button" value="Save to Library"/>	<input type="button" value="Insert"/>	<input type="button" value="Move Down"/>	<input type="button" value="Edit Details"/>	<input type="button" value="Cancel"/>
	<input type="button" value="Remove"/>	<input type="button" value="Remove All"/>	<input type="button" value="Make Parallel"/>	

**Figure 20: Copied Task - Insert**

To insert the copied task click <Ok> and the copied task is added to the workflow. The task can then be repositioned within the workflow by Moving it up or down as seen in **Figure 21**.

<b>Due Date Type:</b> <input checked="" type="radio"/> Floating <input type="radio"/> Fixed		<b>Subflow Return to Assignee?</b> <input type="radio"/> Allow Subflow Creator to Select <input type="radio"/> Return Required - Disable Selection			<input type="checkbox"/> Notify Owner When Workflow is Complete				
#	Task	Received	Due Date	A	Organization	Assignee	Status	Completed	Organiz
1	Set Up Folder	10/27/2005	10/31/2005		OSEC/OES/None...	Main Group	Started		OSEC/OES/
2	Preparation		11/01/2005		OSEC/RD/RBS/N...	Correspondence Cont...	Not Started		
3	Signature		11/08/2005		OSEC/RD/RBS/N...	Correspondence Cont...	Not Started		
4	Preparation		11/09/2005		OSEC/RD/RBS/N...	Correspondence Cont...	Not Started		
5	Signature Verification		11/10/2005		OSEC/OES/None...	Main Group	Not Started		

Remarks:

<b>Workflow List</b>		<b>Task</b>			<b>Update &amp; Return</b>
<b>Insert from Library</b>	<b>Add</b>	<b>Move Up</b>	<b>Copy</b>	<b>Cancel</b>	
<b>Save to Library</b>	<b>Insert</b>	<b>Move Down</b>	<b>Edit Details</b>		
	<b>Remove</b>	<b>Remove All</b>	<b>Make Parallel</b>		

**Figure 21: Copied Task**

8. Edit Details: The Edit Details Option is used to change one task to another or to modify certain details about a task. Tasks that have been completed may not be edited.

The user must select a task to edit and click <Edit Details>. The screen shown in **Figure 22** will be displayed.

### Add/Change Task

**Task:** ▼

Preparation

**Assignee:** Group **Type:** Standard

**User/Position:**

**Group:** Main Group **Select Assignee**

Parent Groups	Mission/Staff	Agency	Division
Office of the Exe...		None	None

**Floating Days to Complete:** 1

**Due Date:**

**Approval**

Not Required

Required

**Notification**

Notify When Task is Complete

**Informational**

Yes

No

**Save & Return**
**Cancel**

**Figure 22: Edit Details – Add/Change Task**

The user may:

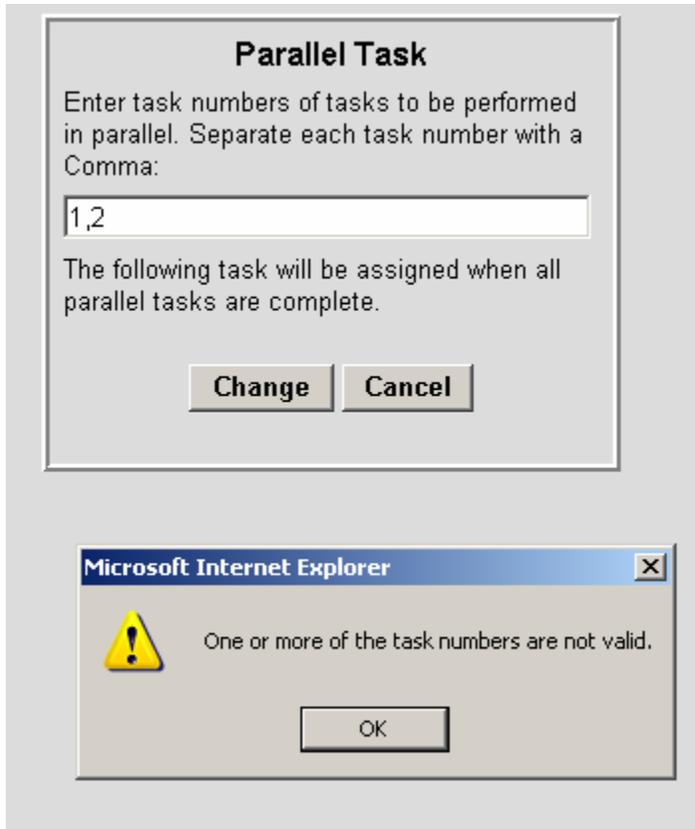
- Choose a different task from the drop-down box in the taskbar - the name of the selected task appears below the task bar.
- Select a different assignee by clicking <Select Assignee>
- Change the number of floating days to complete or the Due Date
- Select approval requirements
- Select whether or not the Folder Owner is to be notified upon completion of the task.

The changes are saved when the <Save & Return> key is entered or all actions may be canceled by selecting the <Cancel> key. The user will be returned to the Workflow Editor.

## 9. Make Parallel

This option permits the user to create a workflow in which two or more tasks can be worked at the same time. The next task is not assigned until all tasks parallel to one another have been completed.

In order for tasks to be made parallel, all of the tasks selected must be “Not Started”. If any of the selected tasks are already started, the error message in **Figure 23** is displayed.



**Figure 23: Parallel Task - Error message**

When the <Make Parallel> key is pressed, the Parallel Task screen is displayed. The numbers of the task to be made parallel are then entered and the <Change> key is pressed.

All tasks to be made parallel can be highlighted at the same time by holding down the CTRL key and selecting the tasks as shown in **Figure 24**.

#	Task	Received	Due Date	A	Organization	Assignee	Status	Completed	Organiza
1	Set Up Folder	10/27/2005	10/31/2005		OSEC/OES/None...	Main Group	Started		OSEC/OES/
2	Preparation		11/01/2005		OSEC/RD/RBS/N...	Correspondence Cont...	Not Started		
3	Signature		11/08/2005		OSEC/RD/RBS/N...	Correspondence Cont...	Not Started		
4	Signature Verification		11/09/2005		OSEC/OES/None...	Main Group	Not Started		

**Figure 24: Make Tasks Parallel by Holding Down the CTRL Key and Selecting Tasks**

When the <Make Parallel> key is pressed the Parallel Task screen is prefilled with the selected tasks as seen in **Figure 25**.

**Parallel Task**

Enter task numbers of tasks to be performed in parallel. Separate each task number with a Comma:

2,3

The following task will be assigned when all parallel tasks are complete.

Change
Cancel

**Figure 25: Parallel Task Screen**

**Figure 26** shows two tasks with a number '2'.

#	Task	Received	Due Date	A	Organization	Assignee	Status	Completed	Organiza
1	Set Up Folder	10/27/2005	10/31/2005		OSEC/OES/None...	Main Group	Started		OSEC/OES/
2	Preparation		11/01/2005		OSEC/RD/RBS/N...	Correspondence Cont...	Not Started		
2	Signature		11/07/2005		OSEC/RD/RBS/N...	Correspondence Cont...	Not Started		
3	Signature Verification		11/08/2005		OSEC/OES/None...	Main Group	Not Started		

**Figure 26: Tasks 2 and 3 After Being Made Parallel**

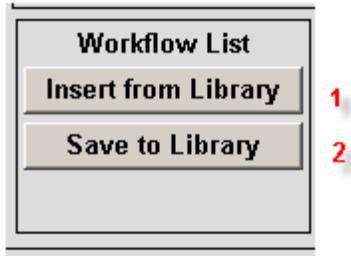
When tasks are made parallel, they are assigned the same number and all subsequent tasks are renumbered.

If the task directly above the parallel tasks is moved down, the task will move down below all the parallel tasks. The parallel tasks will be renumbered and they will remain parallel.

If the task directly below the parallel tasks is moved up, the task will move up above all the parallel tasks. The parallel tasks will be renumbered and they will remain parallel.

## WorkFlow List

The menu for the workflow list is shown in **Figure 27**.

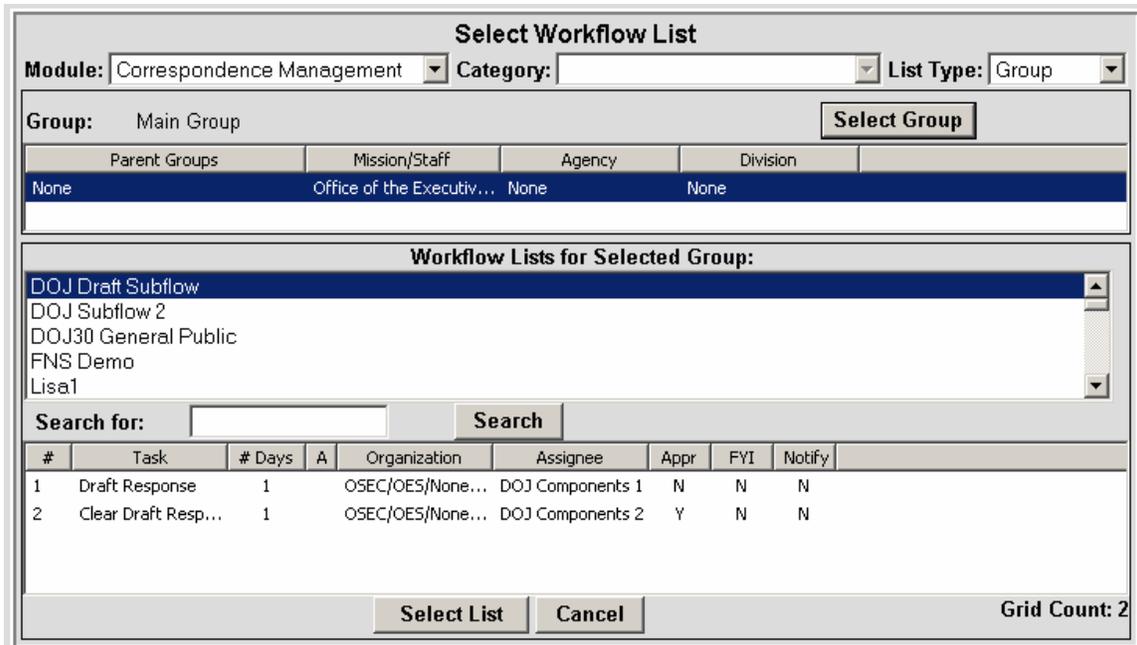


**Figure 27: Workflow List Menu**

1. Insert from Library - The user is taken to the Select Workflow List shown in **Figure 28**.

The user's default group is shown in the top window. The user may search the lists for another group by clicking the <Select Group> key. The list of workflows for that group is shown in the middle window. When a name on the list is highlighted, the workflow attached to that list is shown in the bottom window.

The user may scroll through the list or may search for a specific workflow by entering a name or a partial name in the 'Search For:' box and clicking <Search>.



**Select Workflow List**

Module: Correspondence Management Category: List Type: Group

Group: Main Group

Parent Groups	Mission/Staff	Agency	Division
None	Office of the Executiv...	None	None

**Workflow Lists for Selected Group:**

- DOJ Draft Subflow
- DOJ Subflow 2
- DOJ30 General Public
- FNS Demo
- Lisa1

Search for:

#	Task	# Days	A	Organization	Assignee	Appr	FYI	Notify
1	Draft Response	1		OSEC/OES/None...	DOJ Components 1	N	N	N
2	Clear Draft Resp...	1		OSEC/OES/None...	DOJ Components 2	Y	N	N

Grid Count: 2

**Figure 28: Select Workflow List**

The user clicks <Select List> and is returned to the Workflow Editor. If the workflow is complete and needs no changes, the user clicks <Update and Return>. The user returns to the folder with the workflow tab displayed. The new workflow will be shown in the window as seen in **Figure 29**. The <Launch Workflow> button is now visible.

2. Save to Library: Once the user has created a workflow that will be used again, it can be saved in the workflow library by clicking <Save to Library>.

If a workflow already exists with that name, a pop-up with an error message will be displayed as seen in Figure .

**Workflow List Maintenance**

Add New  Change Existing

List Name: Privacy Act Workflow

Module: Correspondence Management Category: List Type: Group

Group: Main Group

Parent Groups	Mission/Staff	Agency	Division
None	Office of the Executive Secretariat	None	None

Due Date Type:  Floating  Fixed

Subflow Return to Assignee?  Allow  Return

Notify Owner When Workflow is Complete

#	Task	#	Appr	FYI	Notify
1	Review Incoming	1	N	N	N
2	Draft Response	3	N	N	N
3	Research Issues	5	N	N	N
4	Prepare Final	2	N	N	N
5	Final Approval	1	N	N	N

Workflow List:

Task:

**Figure 29: Save Workflow List – Select Existing List Name**

Upon clicking <OK>, the user will be returned to the Workflow Maintenance List where the name can be altered as seen in **Figure 30**.

### Workflow List Maintenance

Add New    Change Existing

**List Name:**

**Module:**    **Category:**    **List Type:**

---

**User:** ecm usertwenty  

Parent Groups	Mission/Staff	Agency	Division
None	Office of the Executive Secretariat	None	None

---

**Due Date Type:**

 Floating  
 Fixed

**Subflow Return to Assignee?**

 Allow Subflow Creator to Select  
 Return Required - Disable Selection

Notify Owner When Workflow is Complete

---

#	Task	# Days	A	Organization	Assignee	Appr	FYI	Notify
1	Review Incoming	1		OSEC/OES/None/None	Main Group	N	N	N
2	Draft Response	3		OSEC/OES/None/None	Main Group	N	N	N
3	Research Issues	5		OSEC/OES/None/None	Main Group	N	N	N
4	Prepare Final	2		OSEC/OES/None/None	Main Group	N	N	N
5	Final Approval	1		OSEC/OES/None/None	Main Group	N	N	N

---

**Workflow List**

**Task**

<input type="button" value="Add"/>	<input type="button" value="Move Up"/>	<input type="button" value="Copy"/>
<input type="button" value="Insert"/>	<input type="button" value="Move Down"/>	<input type="button" value="Edit Details"/>
<input type="button" value="Remove"/>	<input type="button" value="Remove All"/>	<input type="button" value="Make Parallel"/>

**Figure 30: Workflow Maintenance List – List Name Modified**

The user can verify that the List has been saved by clicking on <Insert From Library> and searching for the workflow name as seen in **Figure 31**.

**Select Workflow List**

Module:  Category:  List Type:

User:

Parent Groups	Mission/Staff	Agency	Division
None	Office of the Executiv...	None	None

**Workflow Lists for Selected Group:**

Search for:

#	Task	# Days	A	Organization	Assignee	Appr	FYI	Notify
1	Review Incoming	1		OSEC/OES/None...	Main Group	N	N	N
2	Draft Response	3		OSEC/OES/None...	Main Group	N	N	N
3	Research Issues	5		OSEC/OES/None...	Main Group	N	N	N
4	Prepare Final	2		OSEC/OES/None...	Main Group	N	N	N

Grid Count: 5

**Figure 31: Workflow Maintenance List – List Name**

After saving the workflow, the user remains on the Workflow Maintenance List with the workflow intact but without a list name. The user may continue to create or modify personal workflows.

**CANCEL**

Clicking <Cancel> will return the user to the Main Menu.