Approval Workflows

beeline self-service	Approval workflows are the visual representation of the workflow by approval type. Although the standard terminology is Approval Workflow, this process also covers the actions for reject, complete task, and the ability to trigger the release of notifications. These actions/notifications are arranged in a series called Step Groups. Each workflow in the Beeline Platform is displayed as a visual flow chart that identifies the Step Details, Conditions, and Rules used throughout the Step Groups. This gives the admin-level user the ability to review the logic quickly and easily behind each step.

Please note that depending on your Beeline Platform settings, this feature may, or may not, be turned on. Reach out to your Beeline Representative to adjust settings.

How to Navigate to Approval Workflows via Self-Service:

1. Log in to the Beeline Platform using your *username* and *password*. Your Home page appears.
2. Click the **My Preferences** icon in the top right section of the Header Menu.
3. Hover over **VMS Settings** and click **Workflows** in the expanded menu list. The Beeline Admin: Workflows screen displays.
4. Click the **Approval Workflows** drop-down arrow and then scroll down to locate the applicable workflow **Step Group**.
5. Click the relevant workflow **Step Group** hyperlink. The screen refreshes to display the workflow visual flow chart.

   TIP: Use the **Return** button in the Action bar and not the browser <back> arrow to navigate back to a previous screen!

How to Review the Logic of Approval Steps:

Complete steps 1-5 above.

Notice that each section of the Workflow includes one or more of the following hyperlinked actions:

- **View Rules** - Click to review which rules apply to which workflow step.
- **# condition** - Click to review conditions under a specific step.
- **# rule** - Click to view the specific rule that applies to a specific step.
- **Notification** - Click the drop-down arrow to either preview the notification, or in some instances, create a template.

To learn more about creating or editing notifications, please review **Advanced Notification Templates**. **Advanced Notification Templates** can be found under the **VMS Settings** menu. Click the gear icon () in the Header Menu bar and navigate to **VMS Settings** > **Workflows** > **Advanced Notification Templates**.

6. Use the available hyperlinks throughout the workflow you selected to review the overall logic and functionality.

   TIP: Review the **entire** workflow before making any adjustments to a specific workflow step. "Approve" actions are diagramed on the screen's left-hand side flow chart; "Reject" actions are displayed on the right.

How to Add a Workflow Step:

- ✓ When adding a new workflow step, it is important to be mindful of both the number of conditions on a single step as well as the overall number of steps in the entire workflow. Too many steps and conditions can cause performance issues that make it more challenging to maintain and troubleshoot workflows.
- ✓ When using the Self-Service option to add or adjust workflow steps, it is strongly recommended that **thorough** testing be conducted in a test site before making ANY changes in production!
- ✓ Remember to review the **entire** workflow, not just the step that was added or edited.
- ✓ Consult with your Beeline Representative if integrations will be impacted **before you activate the workflow changes in production.**

Complete steps 1-5 from the "How to Navigate to Approval Workflows via Self-Service" section.

6. Click **+ Add Approval Step** in the Action bar above the workflow. The screen darkens to highlight every step where the "Add Approval Step" is a valid option.
7. Select the location for your workflow step and click the relevant **Add Here** button. The screen refreshes to display an Add Approval Step window to match your selection.
8. Complete the required fields, as indicated by the asterisk (*). Complete the other fields as needed. Review the **Behavior fields** carefully since these settings determine how the approval step behaves and the actions a user can take:
   - **Action***: Specifies what kind of step this is.
     - **Approve/Reject -** Use this option if the approval or rejection does not need to be unanimous.
     - **Notification**: Gives the ability to trigger notifications as part of the workflow activity.
     - **Unanimous Approve/Reject**: Use this option only if all designated approvers need to Approve/Reject a step's action.
     - **Task**: Gives the ability to incorporate tasks that need to be completed before the workflow can proceed.
     - **Unanimous Task**: Like a standard Task Approval Action Type, this halts the workflow until **every participant** on the approval step has completed the task.
   - **Default Result***: Determines which action is taken (i.e., approved or rejected). The **Action** field only identifies the workflow **type**.

- **Send Reminder***: Determines whether a reminder ("Approval Reminder") should be sent to approvers if the step has been waiting for more than two days. NOTE: Certain days may be excluded from this calculation (e.g., weekend days). The default behavior is "Yes".
- **Escalate***: Determines whether a separate escalation workflow ("Approval Escalation") should be generated if the step has been waiting for more than ten days. NOTE: Certain days may be excluded from this calculation (e.g., weekend days). The default behavior is "No".
- **Approved Action Label**: Enter the custom label to display for the "Approve" action button. If left blank, the default ("Approve") will be used.
- **Reject Action Label**: Enter the custom label to display for the "Reject" action button. If left blank, the default ("Reject") will be used.
- **Enable Email Approval**: Click the checkbox to allow users to perform an action (Approve, Reject, or Complete) by replying to the email notification.

9. Complete the **Approver Settings** section, which are settings for selecting and viewing approvers when submitting an item:
   - **Allow User Selection**: Click the checkbox to allow the user to choose this step's approvers when submitting an item. If selected, additional options include:
     - **User Selection Optional:** Click the checkbox to allow the user to leave the list of approvers empty for this step. If there are no approvers, the step automatically completes to match the Default Result field's setting.
     - **Allow Self-Selection:** Click the checkbox to allow the user to select themself as an approver.
   - **Hide Approvers**: Click the checkbox to block the user from seeing the list of approvers when submitting an item.
10. Complete the **Notifications** section, which are settings that affect notifications and workflow details:
    - **Notification Template***: Select the notification template that you want to be used. The template determines how workflow details will appear.
    - **Recipient type*** (drop-down): Assigns visibility to displayed workflow details content based on user role.
    - **Display Approval History in Notifications**: Click the checkbox if email notifications should include information detailing the steps and approvers.
11. Click **OK** to save changes and return to the workflow flow chart.

Main Benefits of Workflow Oversight:

- Ability to display workflow process steps quickly and easily so program administrators can "see" the start to finish workflow.
- Ability to export workflows in PDF format.
- Eliminates the need to submit JIRA tickets to Configuration to add/edit workflow steps.