Initiate an Automated or Manual Workflow

Workflows can be initiated manually on documents or they can be automatically initiated based on configuration by the Chase Administrator.

Below are steps to show you how to:

- automatically trigger a configured workflow
- manually initiate a workflow

Step-by-step guide

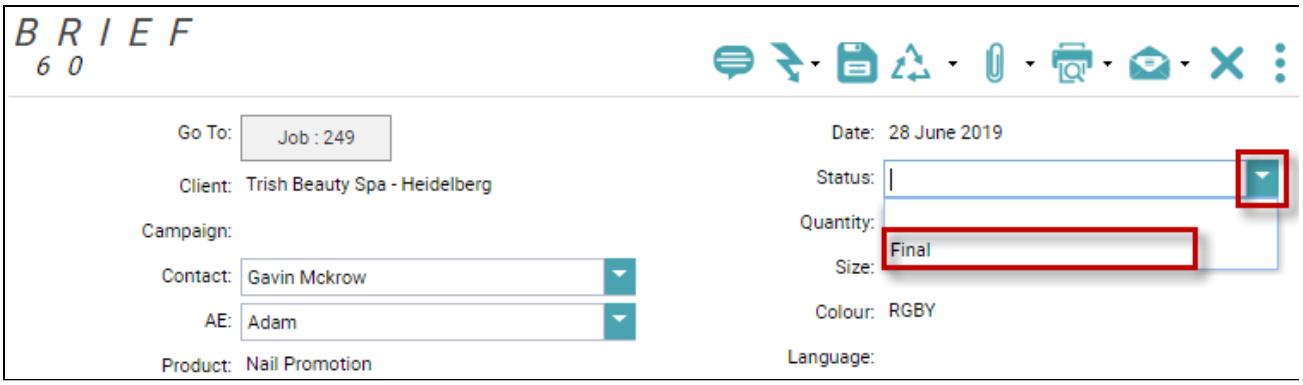
Automatically trigger a configured workflow

1. Navigate to the document which you want to trigger a workflow from.

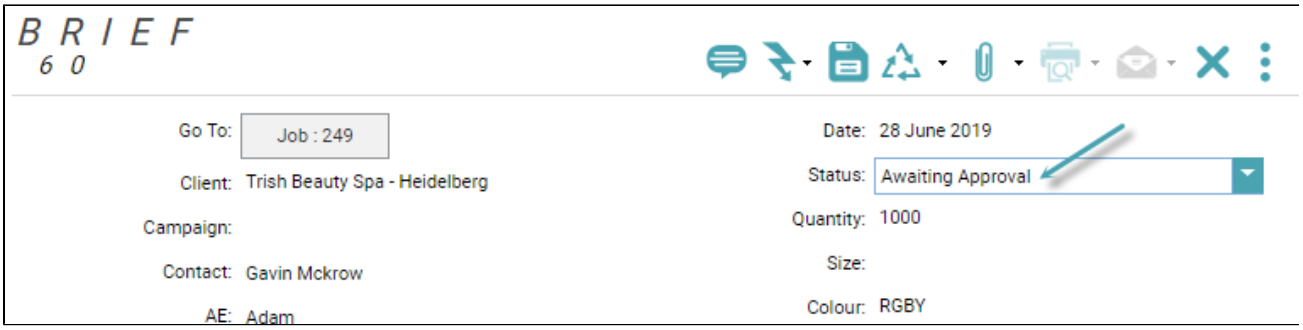
   In this example, **Brief 60** was opened.

2. Click the **Status** drop down and select the status that will trigger a workflow.

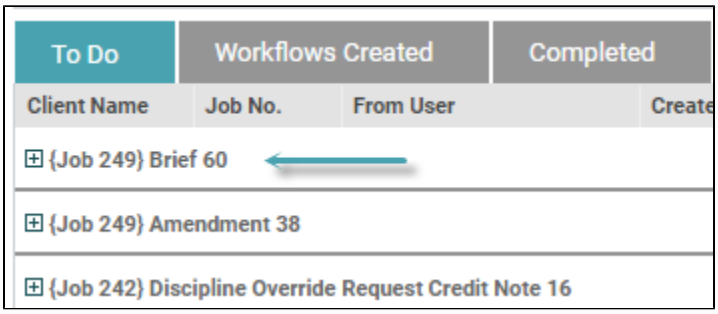
   For this example, **Final** was selected.



   The document status will change from Draft to Awaiting Approval. Once the workflow is Approved the status will be updated to the target status, which in this case is **Final**.



The workflow recipient will receive an email notification and a to-do item under the To Do tab of the Home page. For steps on how to approve/decline items in a workflow, please follow this topic: Approve/Decline a document workflow request



If you want to cancel this workflow please follow this help topic: Cancelling a workflow

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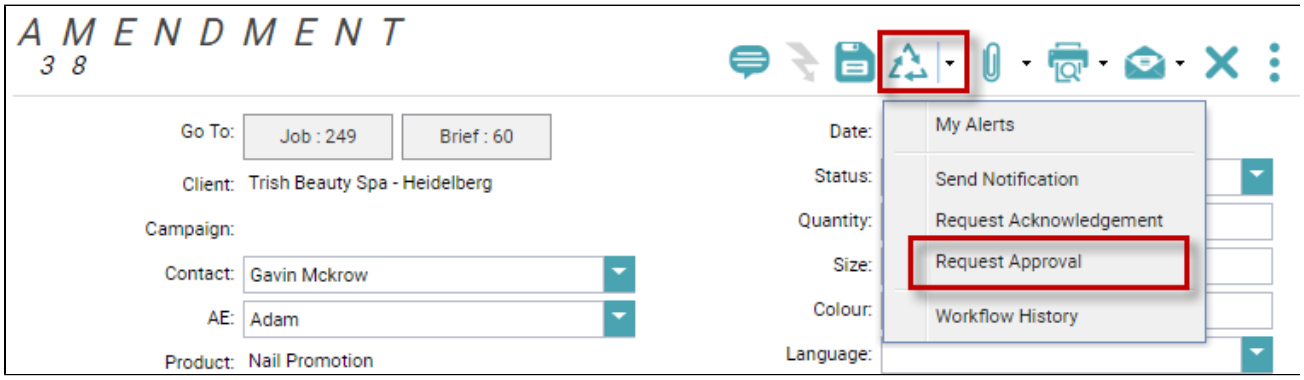
Manually initiate a workflow

1. Navigate to the document which you want to initiate a workflow from.

   In this example, **Amendment 38** was opened.

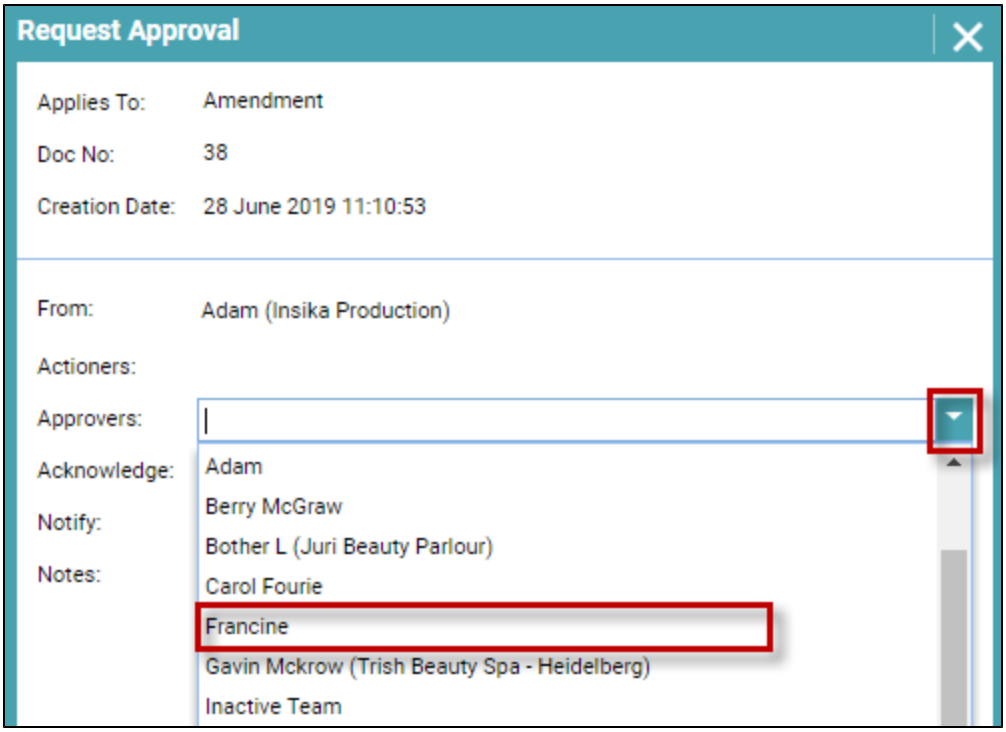
2. Click the **Workflow Action** drop down and select **Request Approval**.



   The *Request Approval* dialog appears.

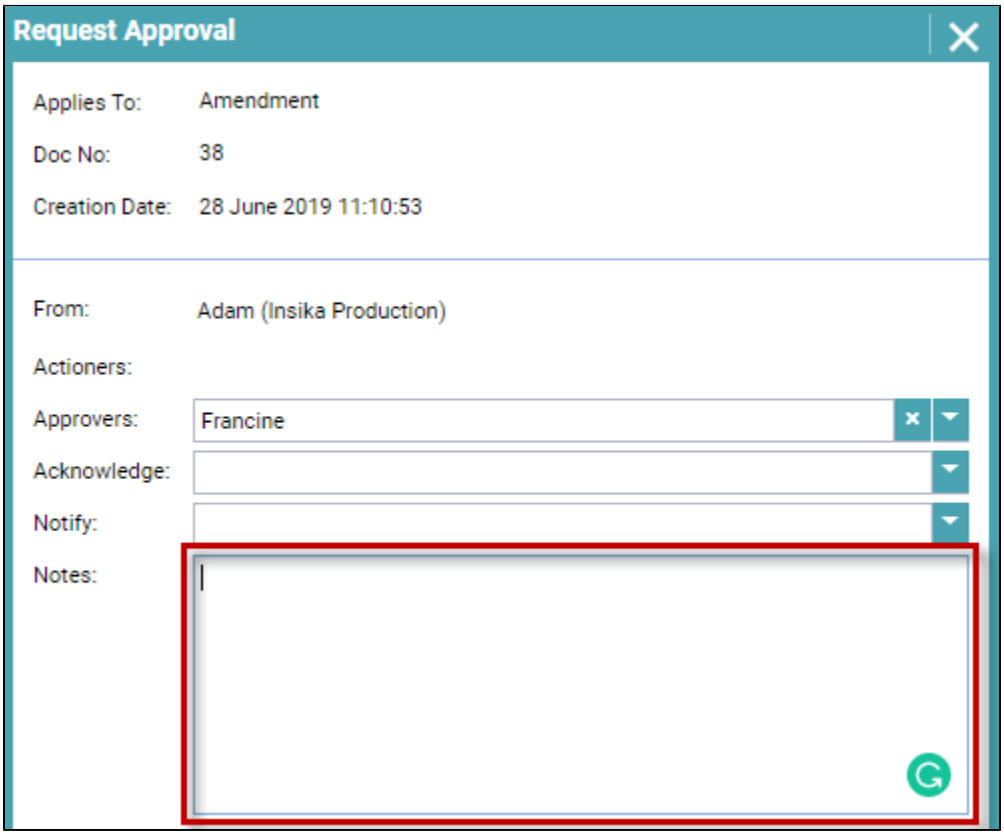
3. Click the **Approvers** drop down and select users that will be allowed to approve/decline your request.

   For this example, **Francine** was selected.

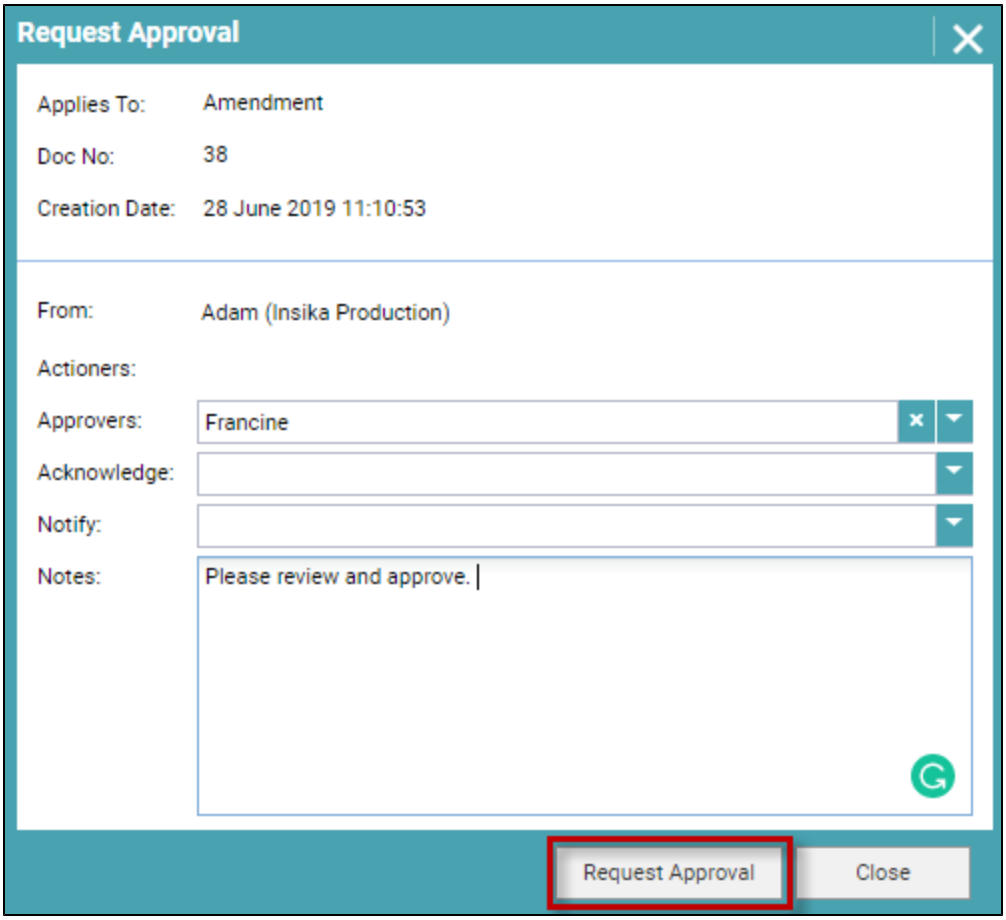


You can optionally select users that need to acknowledge the workflow or be notified about the workflow.

4. In the **Notes** field enter a comment/message for the approver.



5. Click the **Request Approval** button.



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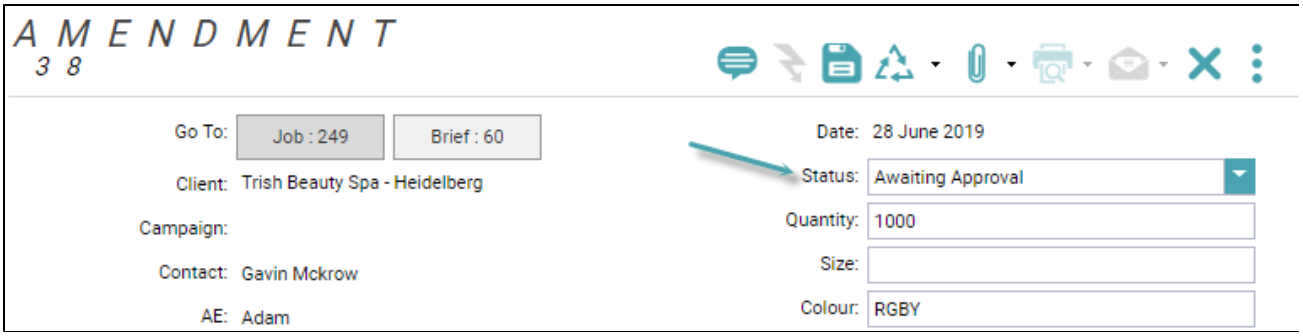

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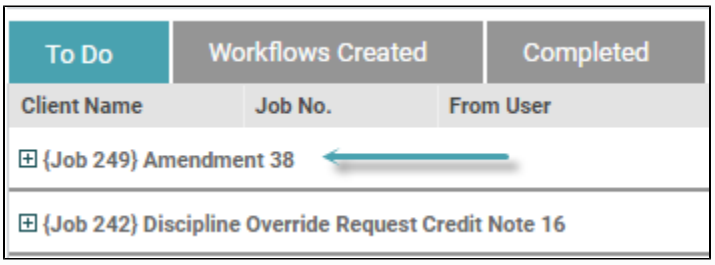

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