

Workflow Setup

Chase Workflows monitor the status of activities, route work from one activity to another, and enforce business rules. They ensure that when a project is complete, all necessary steps have been taken and constraints imposed by management have been adhered to.

Chase allows agencies to automate many of their processes by:

- Providing statuses for the documents used to control a process.
- Requiring actions to be performed in response to a change in a document's status.
- Monitoring those actions to ensure they are carried out promptly, and escalating those past due.
- Initiating further or automated actions that will progress a process to its next phase of activity and eventually to its conclusion.

In Chase, there are two types of workflows, a Predefined workflow and a Manual workflow.

Contents

- [Setting up an Expense Claim Workflow](#)
- [Setting up a Job Reverts Workflow](#)
- [Managing Workflows](#)
- [Production Workflows](#)
- [Workflow dialog explained](#)
- [Setting up a Brief and an Amendment Workflow](#)
- [Setting up a Multi list Workflow](#)
- [Using Business Unit Distribution Lists in Workflows](#)

Predefined Workflow

A Predefined Workflow is activated automatically in response to a change in document status. When there is a status change to a document, a Workflow initiated message will appear, explaining the action the Workflow took.

This workflow is set up in the Configuration. Not all users are able to set up a workflow but in most agencies, the Client Service and Production users can.

To view details of all Workflows activated in response to your actions, check the Workflows Created tab on your **Chase Home page**. To view details of all actions required by you in response to a Workflow, check the **To Do** tab on your Chase Home page.

Set up new / edit existing workflow [X]

Applies to: Cost Sheet [v]
Trigger: Status Changed [v]
When From Value is equal to: Draft [v]
When To Value is equal to: Final [v]
Action Type: Needs Action [v]

← All Filters | Custom SQL Filter | Participant Seq. Groups | **Participants** | →

Seq. group	Respondent	Action	Required	
1	Francine	Approve / Decline	<input checked="" type="checkbox"/>	X
1	Tumelo Morake	Acknowledge	<input type="checkbox"/>	X

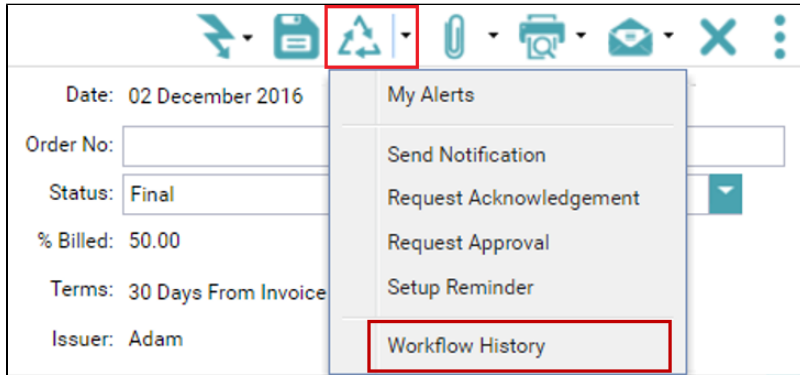
Send Emails Active

[Update] [Cancel]

Manual Workflow

The Manual Workflow requires a manual action to be performed on a document. If an action is taken, a Workflow initiated message will appear, explaining the action taken by the Workflow.

The action is taken from the Workflow Action button that appears on each document.



Field Help

WORKFLOW SETUP								Edit Templates +
Applies To	Trigger	Desc	Values	Additional Filters	Originator	Recipient	Is Active	
Timesheet Time	Status Changed		Pending				<input checked="" type="checkbox"/>	
Achievement	Status Changed		Approved			- [DocumentBase Client L...	<input checked="" type="checkbox"/>	
Fee	Status Changed		Approved			- [DocumentBase Client L...	<input checked="" type="checkbox"/>	
Achievement	Status Changed		Declined			- [DocumentBase Job AE...	<input checked="" type="checkbox"/>	
Fee	Status Changed		Declined			- [DocumentBase Job AE...	<input checked="" type="checkbox"/>	
Reminder for Job B...	Reminder for Job B...					- [Job AE To Be Notified]	<input checked="" type="checkbox"/>	
Reminder for Job B...	Reminder for Job B...					- [Job AE To Be Notified]	<input checked="" type="checkbox"/>	
Expense	Status Changed		{Any Other} to Approved			- [Supplier Invoice Contro...	<input checked="" type="checkbox"/>	
InHouse PO	Status Changed		{Any Other} to Checked			- [Creditors Clerks]	<input checked="" type="checkbox"/>	
Billing Instruction	New Entry From Rel...					- [Client Invoice Controlle...	<input checked="" type="checkbox"/>	
Sub Tasks	New Task Allocated	Tasking Workflow				- [Sub Task Assignee]	<input checked="" type="checkbox"/>	
Sub Tasks Notificati...	Task User Complete...	Tasking Notifications				- [Next Sub Task Assigne...	<input checked="" type="checkbox"/>	
Brief	Status Changed		Draft to Final			Adam , Carol Fourie	<input checked="" type="checkbox"/>	
Amendment	Status Changed		Draft to Final			Adam , Berry McGraw, M...	<input checked="" type="checkbox"/>	
Cost Sheet	Status Changed		Draft to Final			Francine, Tumelo Morake	<input checked="" type="checkbox"/>	
Job Bag	Status Changed		Finished to Awaiting Clos...			Adam , Carol Fourie, Berr...	<input checked="" type="checkbox"/>	

Columns	Description
Applies To	Specify to which type of document the Workflow will apply.

Trigger	Triggers are used to activate actions when certain conditions change on a Form. For example, once a User changes the status of a document, a Workflow will kick off.
Desc	This can be specified to provide a custom description of the Workflow created.
Values	Indicates that the Workflow kicks off when the status of the document changes from one status to another.
Additional Filters	Allows you to enter additional conditions that must apply before the Workflow will run.
Originator	Indicate that the Workflow will be run only when a specific User has changed the document's status.
Recipient	Indicate a User who must take action required by the Workflow. For example, a User who will approve/decline the Workflow, or Users who will be notified or who need to acknowledge the Workflow.
Is Active	If checked, it indicates that the Workflow can be used immediately after creation. If unchecked, the Workflow cannot be used.

Set up new / edit existing workflow
✕

Applies to:

Trigger:

When From Value is equal to:

When To Value is not equal to:

Action Type:

Fields	Description
Applies to	Specify to which type of document the Workflow will apply.
Trigger	Triggers are used to activate actions when certain conditions change on a Form. E.g. Status change. Once a user changes the status of a document a workflow will kick off. Once a trigger is selected there will be additional fields added below. The fields will be unique based on the trigger selected.
When From Value is equal to	This field changes depending on the trigger selected. i.e. it is hidden by default. If the trigger selected is Status Change, then you need to indicate at which status the document type selected must kick off the workflow, for example change the Job Bag status from Open to Closed.
When To Value is equal to	This field changes depending on the trigger selected. i.e. it is hidden by default. If the trigger selected is Status Change then you need to indicate to which status the document type must be changed to kick off the workflow, for example change the Job Bag status from Open to Closed.
Action Type	This field changes depending on the trigger selected, i.e. it is hidden by default. Indicate if this is a Notification, Acknowledgement or Needs Action workflow. <ul style="list-style-type: none"> • Notification Only - this will notify participants when certain items change in the document type selected. • Acknowledgement - confirm that the Workflow has been received. • Needs Action - this means that action needs to be taken by means of Approving or Declining the workflow.

< Setup
Additional Filters
Custom SQL Filter
Participant Seq. Groups >

WorkFlow Setup Description:

Only Initiate Workflow when the following filters apply:

Originator: ▼

Originator Type: ▼

Escalation Settings:

Escalate to Manager:

Escalate to other: {None}

Escalate after (# hours): # hours

Setup tab	
W o r k f l o w S e t u p D e s c r i p t i o n	Short description entered by the creator of the Workflow, e.g CE approval workflow.
O r i g i n a t o r	Indicate that the Workflow will be initiated only when a specific User has changed certain items on a document. If left blank, the Workfl
O r i g i n a t o r T y p e	Indicate whether the initiator is a Chase user or a Client/Supplier portal user.

E
s
c
a
l
a
t
e
t
o
M
a
n
a
g
e
r

The Escalation Settings fields and checkbox are by default not selectable. These fields are activated only if the Action Type selected is

Trigger:	Status Changed	▼
When From Value is equal to:	Open	▼
When To Value is equal to:	Closed	▼
→ Action Type:	Needs Action	▼

If the Escalate to Manager checkbox is checked, an alert will be sent to the respondent's nominated manager if a User fails to action the number of hours.

The nominated manager can be selected on the Users Details.

User Details			
User Name:	Adam	→ Manager:	
Initials:	ADM	Linked Supplier:	Expense Claim
Title / Designation:	Administrator	Timesheet Type:	
Department:		Target Hours:	8
Other Dept. Task Types:		Target Billable %:	90

E
s
c
a
l
a
t
e
t
o
o
t
h
e
r

Specify another User to which escalation alerts must be sent regardless of whether the manager is alerted or not.

E
s
c
a
l
a
t
e
a
f
t
e
r
(#
h
o
u
r
s)

Enter the number of hours after which an incomplete action will be escalated.

Navigation: Setup | **Additional Filters** | Custom SQL Filter | Participant Seq. Groups

Field Name	Comparison	Value
Job Client	is equal to	Audi SA

Additional Filters	
Enter additional conditions that must apply before the Workflow will kick off.	
Add New button	Add a new line to add additional filters.
Field Name	Select a field to which the condition will apply, e.g. Job Client field on the Job Bag.
Comparison	Indicate how the selection in the Field Name will be compared to a specified Value, e.g. Is Equal To. Please note that the comparison field list will differ depending on the selected Field Name or Document type.
Value	Enter a value against which the Field Name will be evaluated. e.g. Client name.

Navigation: Setup | Additional Filters | **Custom SQL Filter** | Participant Seq. Groups

CustomerID = 6

Available Tables:

- Del. : Old values for caJob
- Ins. : New values for caJob

Custom SQL Filter

This allows for powerful custom conditions to be created.

This feature requires an intimate knowledge of Chase's database structure and the SQL database language. Consult with Chase Support to implement it.

Sequence No	No of Approvals/Actions Required	
1	1	X
2	1	X

Participant Seq. Groups

Allows you to define the number of Workflow steps.

Add New

Add a new sequence.

Sequence No

Define the order in which the approval steps will take place.

The image above shows that 2 separate approvals are required in a specific order.

No of Approvals/Actions Required

Defines the number of users required for the approval process, i.e. this field is linked to the Participants tab.

Seq. group	Respondent	Action	Required	
1	Aaron Hanks	Notify	<input type="checkbox"/>	X

Participants

Set which Users must respond to the Workflow once it is kicked off.	
Add New	Add a new row to the table of participants.
Seq. group	This column is directly linked to the Sequence No column in the Participants Seq Groups tab, i.e. it is related to how many steps are involved in the Workflow.
Respondent	Select the user who may be required to take action in the Workflow.
Action	Select the action required by the respondent. e.g. Approve/Decline Workflow.
Required	If checked then the selected respondent MUST perform the action. If not checked, the respondent action is optional.