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.

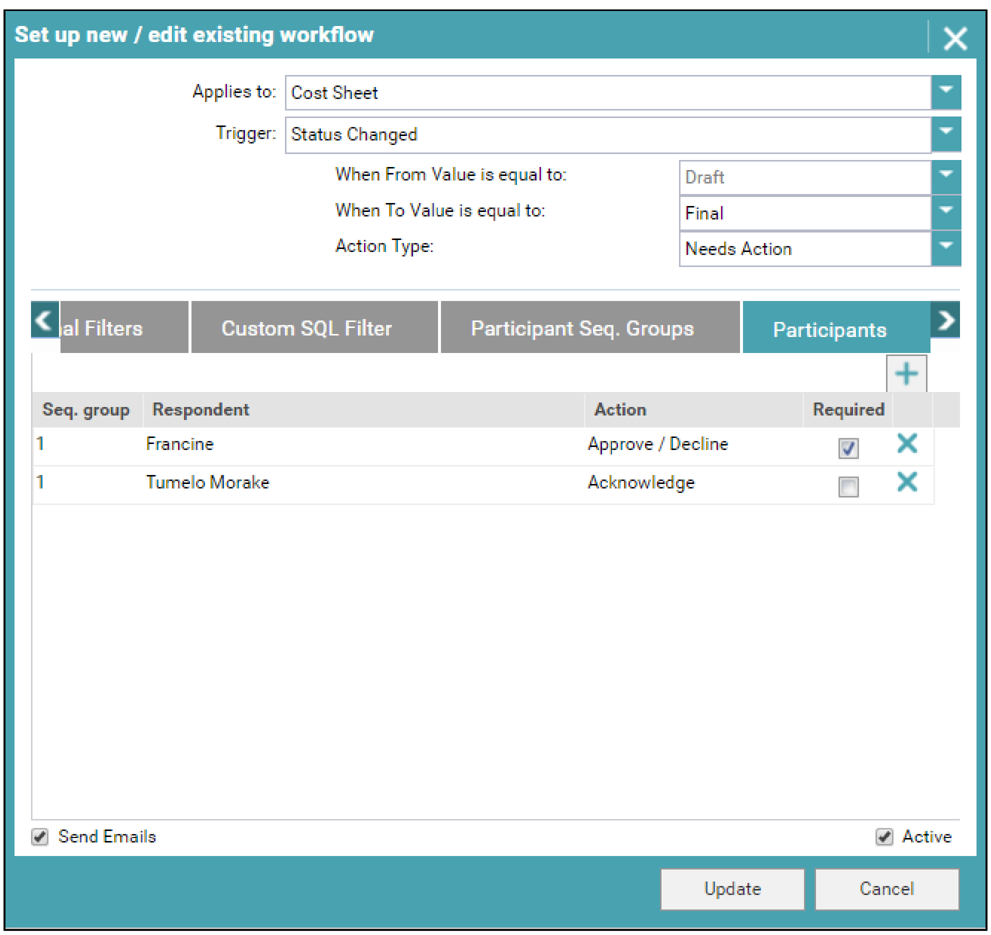
Contents

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.

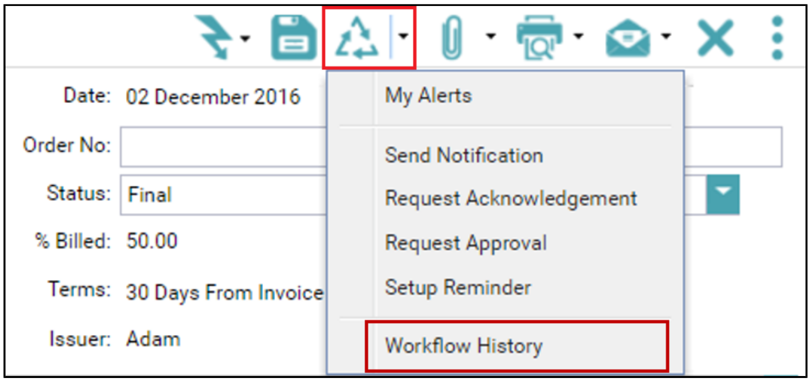
To view details of all Workflows activated in response to your actions, check the Workflows Created tab on your **Chase Home page**. To view details of all actions required by you in response to a Workflow, check the **To Do** tab on your Chase Home page.



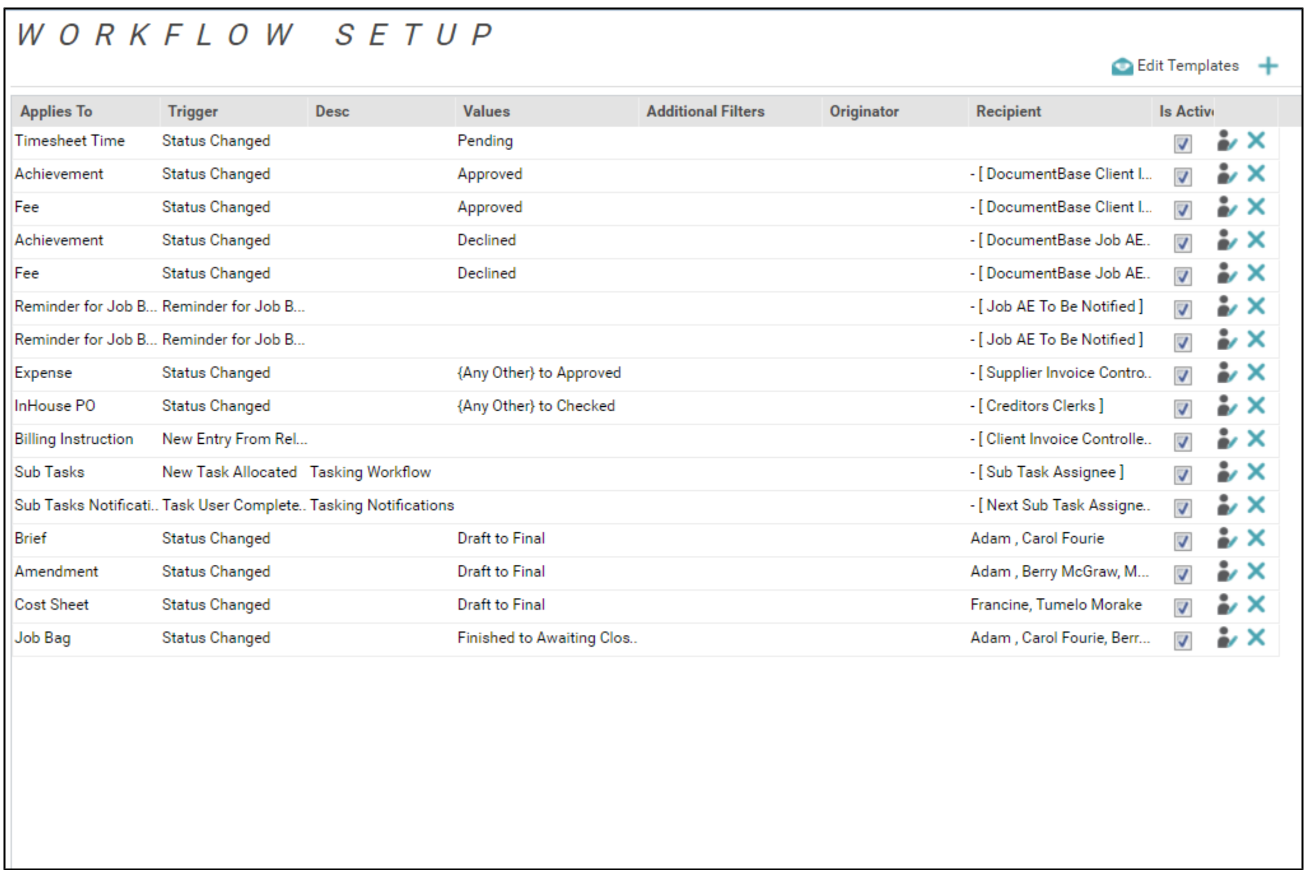
Manual Workflow

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.

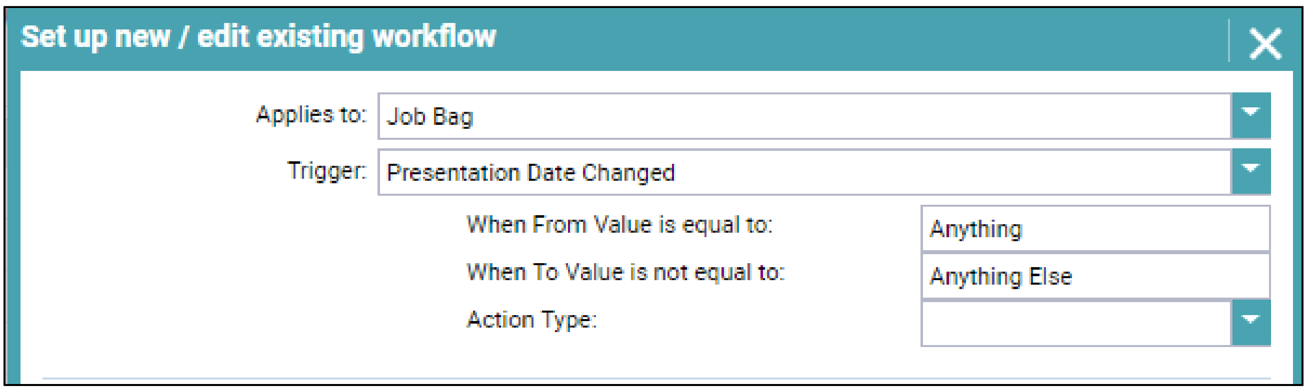


Field Help

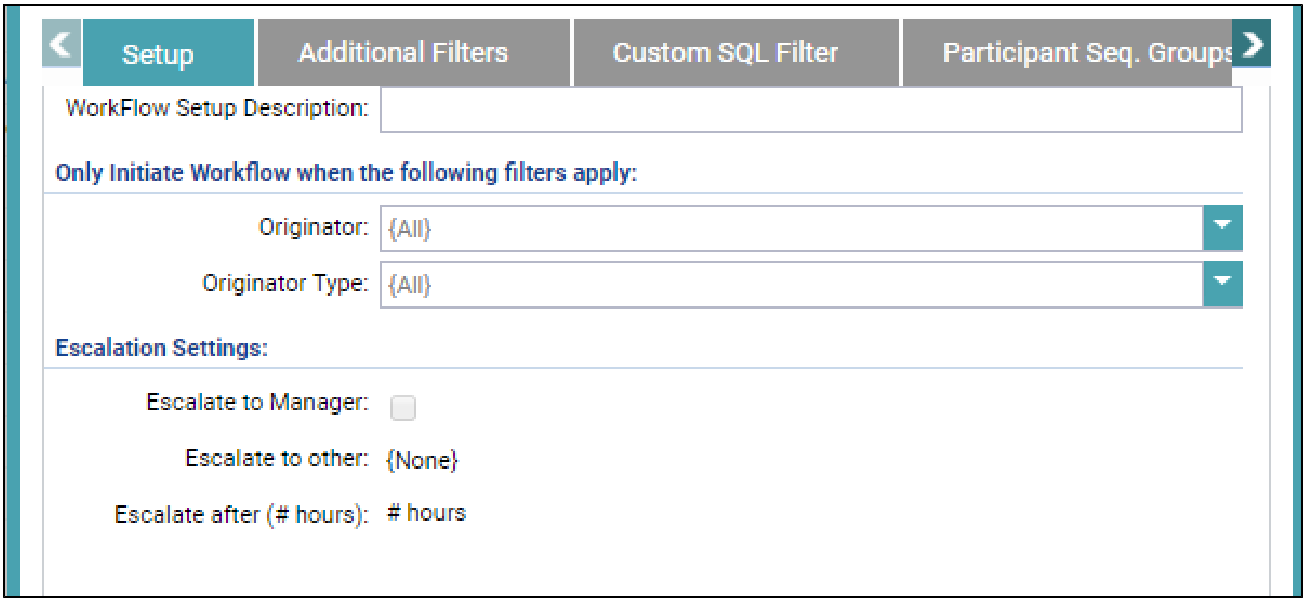


Columns	Description
Applies To	Specify to which type of document the Workflow will apply.

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.

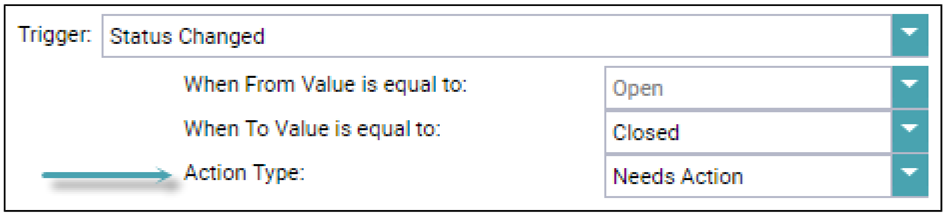


Fields	Description
Applies to	Specify to which type of document the Workflow will apply.
Trigger	Triggers are used to activate actions when certain conditions change on a Form. E.g. Status change. Once a user changes the status of a document a workflow will kick off. Once a trigger is selected there 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. • 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.



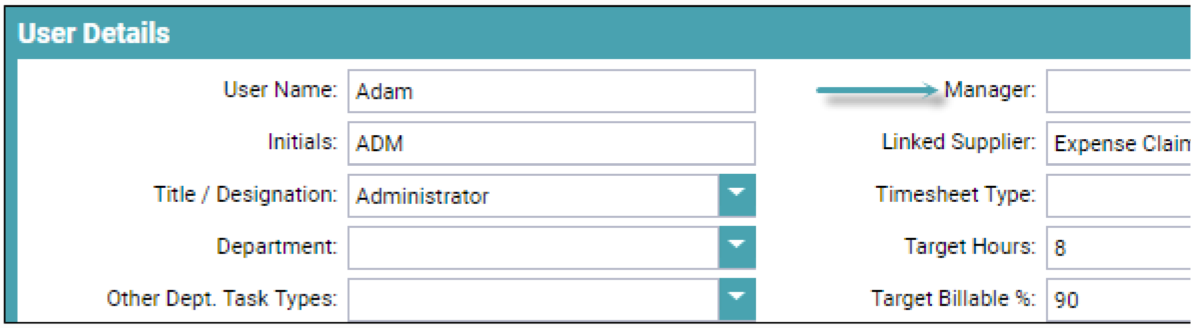
Setup tab	
WorkflowSetupDescription	Short description entered by the creator of the Workflow, e.g CE approval workflow.
Originator	Indicate that the Workflow will be initiated only when a specific User has changed certain items on a document. If left blank, the Workfl
OriginatorType	Indicate whether the initiator is a Chase user or a Client/Supplier portal user.

<table>
<tr>
<td>Escalate to Manager</td>
<td>
The Escalation Settings fields and checkbox are by default not selectable. These fields are activated only if the Action Type selected is

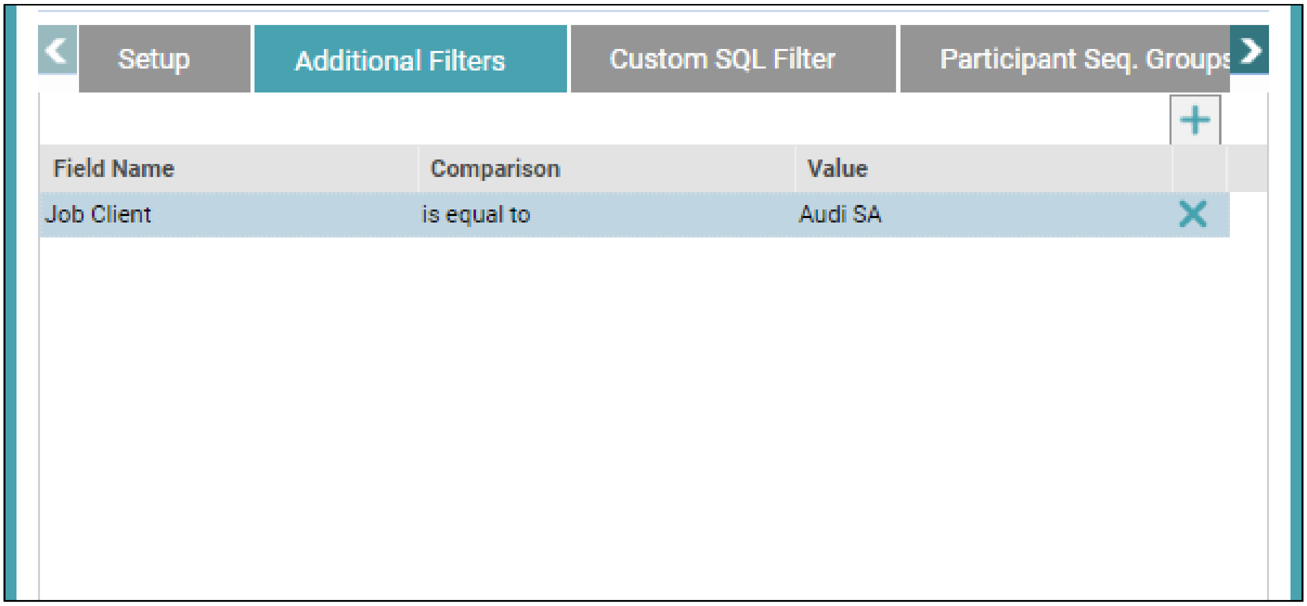


If the Escalate to Manager checkbox is checked, an alert will be sent to the respondent's nominated manager if a User fails to action th number of hours.

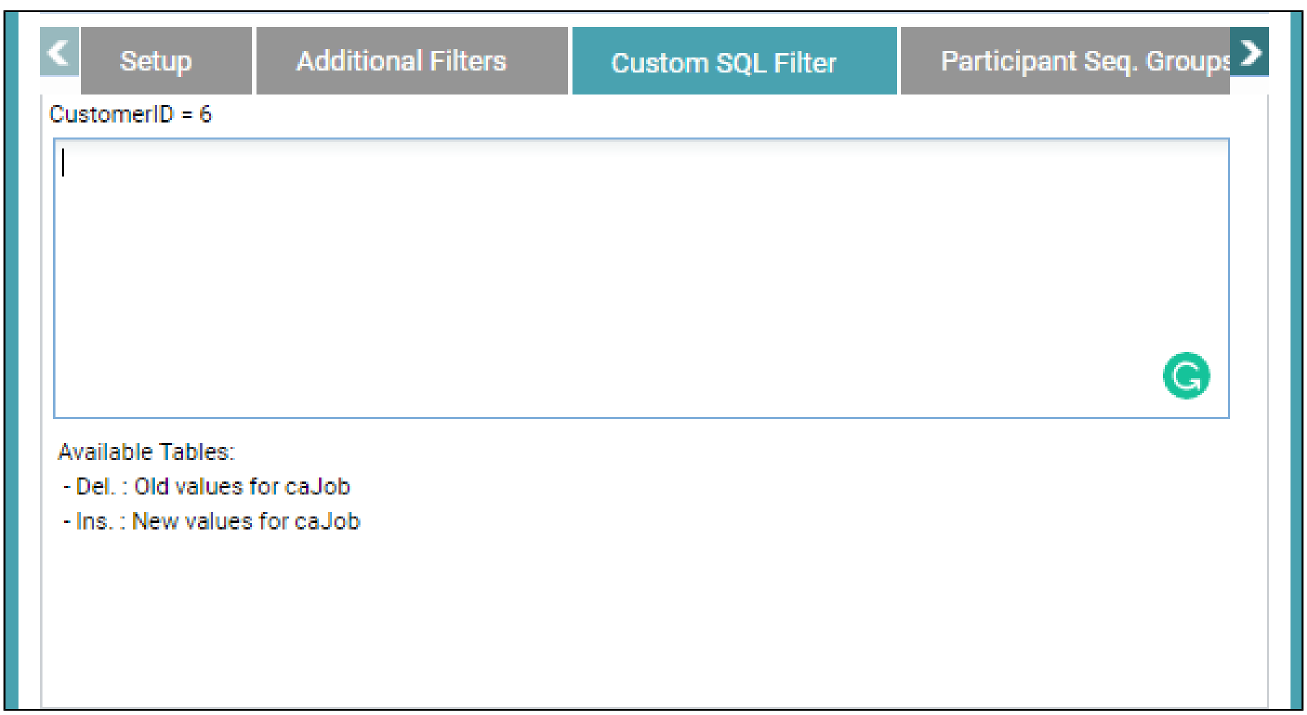
The nominated manager can be selected on the Users Details.



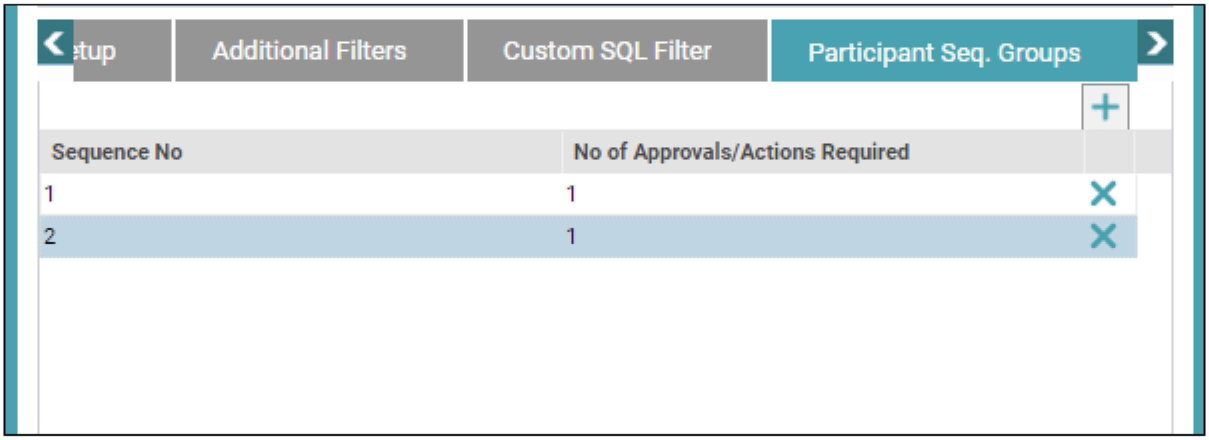
</td>
</tr>
<tr>
<td>Escalate to other</td>
<td>Specify another User to which escalation alerts must be sent regardless of whether the manager is alerted or not.</td>
</tr>
<tr>
<td>Escalate after (# hours)</td>
<td>Enter the number of hours after which an incomplete action will be escalated.</td>
</tr>
</table>



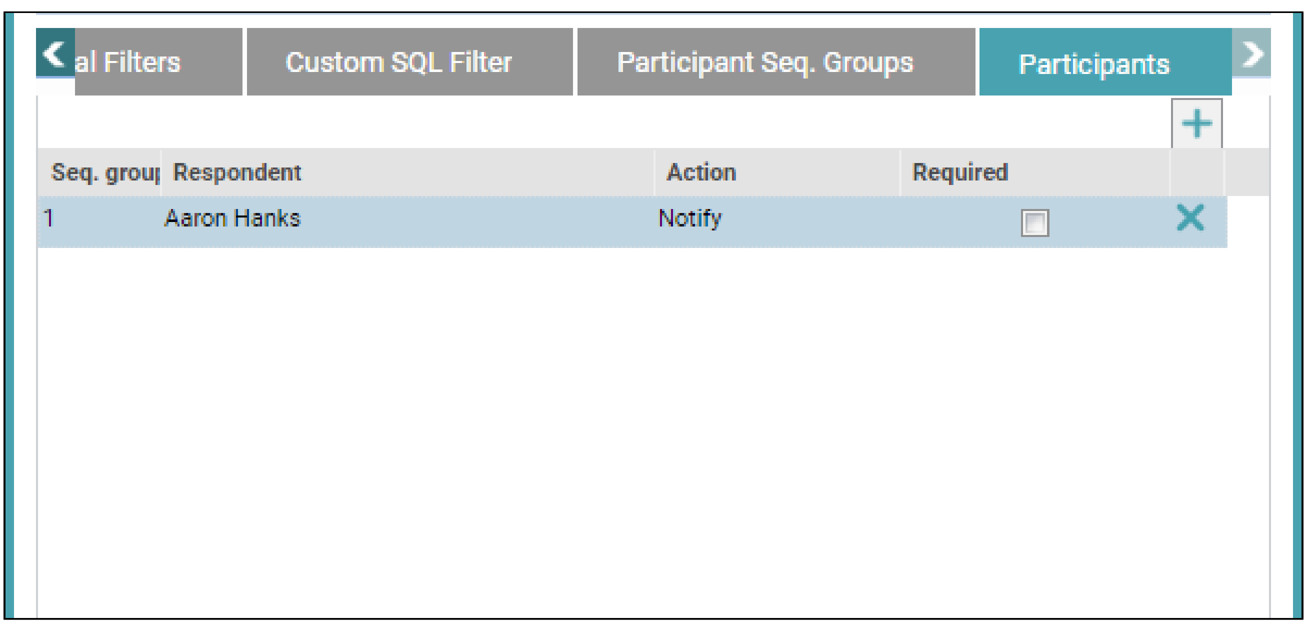
Additional Filters	
Enter additional conditions that must apply before the Workflow will kick off.	
Add New button	Add a new line to add additional filters.
Field Name	Select a field to which the condition will apply, e.g. Job Client field on the Job Bag.
Comparison	Indicate how the selection in the 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.



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.



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.



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.
Respon dent	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.