Managing Workflows

Chase allows you to manage workflows by setting up substitute workflow users, reassigning or cancelling workflows.

Find out how to:

- set up a workflow substitute
- reassign a workflow
- cancel a workflow

Step-by-step guide

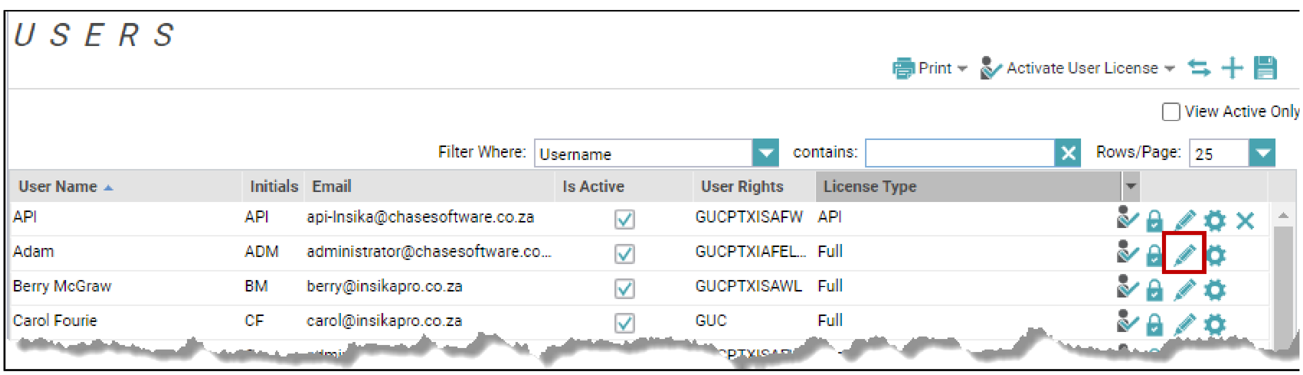
Setting up a Workflow Substitute

A workflow substitute is a User who will receive a workflow notification if the required person is not available. The substitute User and date range will then need to be set up so that the workflow is re-directed to the substitute User for the duration of the date range. This functionality is useful when you know beforehand that someone is going to be unavailable for a certain period of time (eg. annual leave, parental leave).

1. Navigate to **Settings**, click the **Resources** item to expand it, and select **Users**.

   The *Users* screen appears with a list of all users.

2. On the *Users* screen, click the **Advanced Edit** button next to the User whose workflows are to be actioned by someone else.

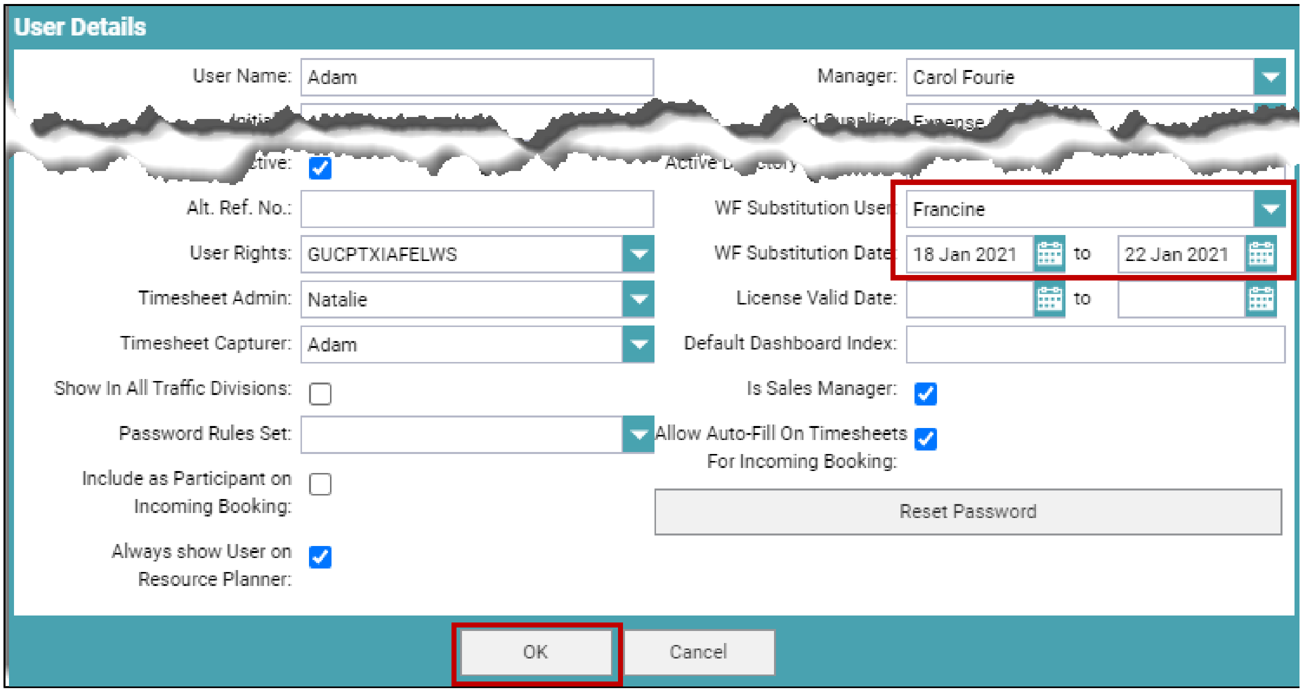


3. On the *User Details* dialog, click on the **WF Substitution User** field, and select an alternative User who will action the workflow.

   > The substitute User will receive a workflow notification for any new workflow, and is required to act on it.

4. Click the **WF Substitute Date** picker and select the date on which the substitute User will start receiving workflow notifications.

5. Click the **OK** button.

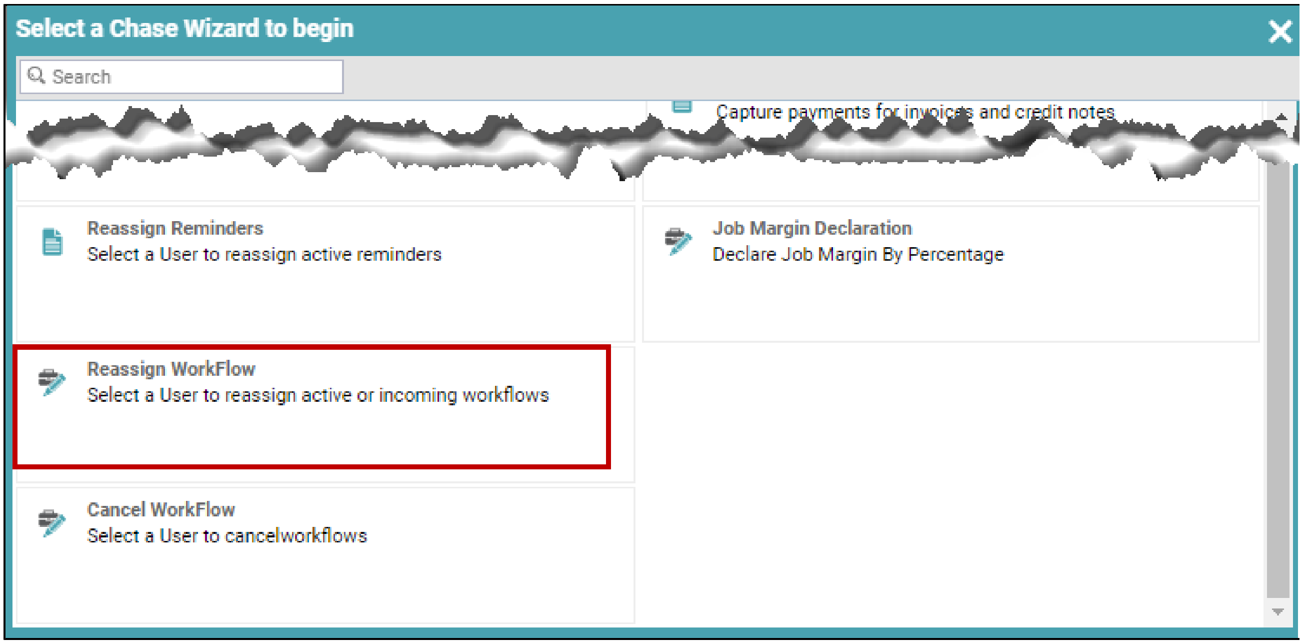


Reassigning a Workflow

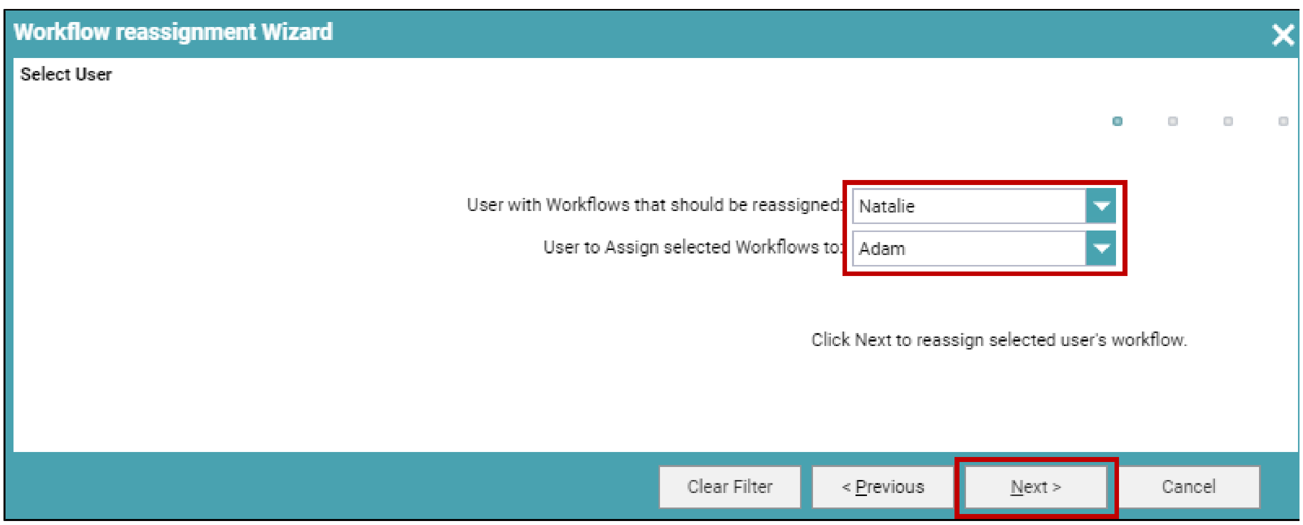
When you set up Workflows, you select specific users (participants) who will be required to take action once the Workflow has been initiated. The purpose of the Reassign Workflow Wizard is to allow you to set up a substitute for the default participant in the event that they are unavailable. This is useful if you did not set up a substitute and the person is already unavailable (eg. sick leave, family responsibility leave).

1. Click the **Wizards** button.

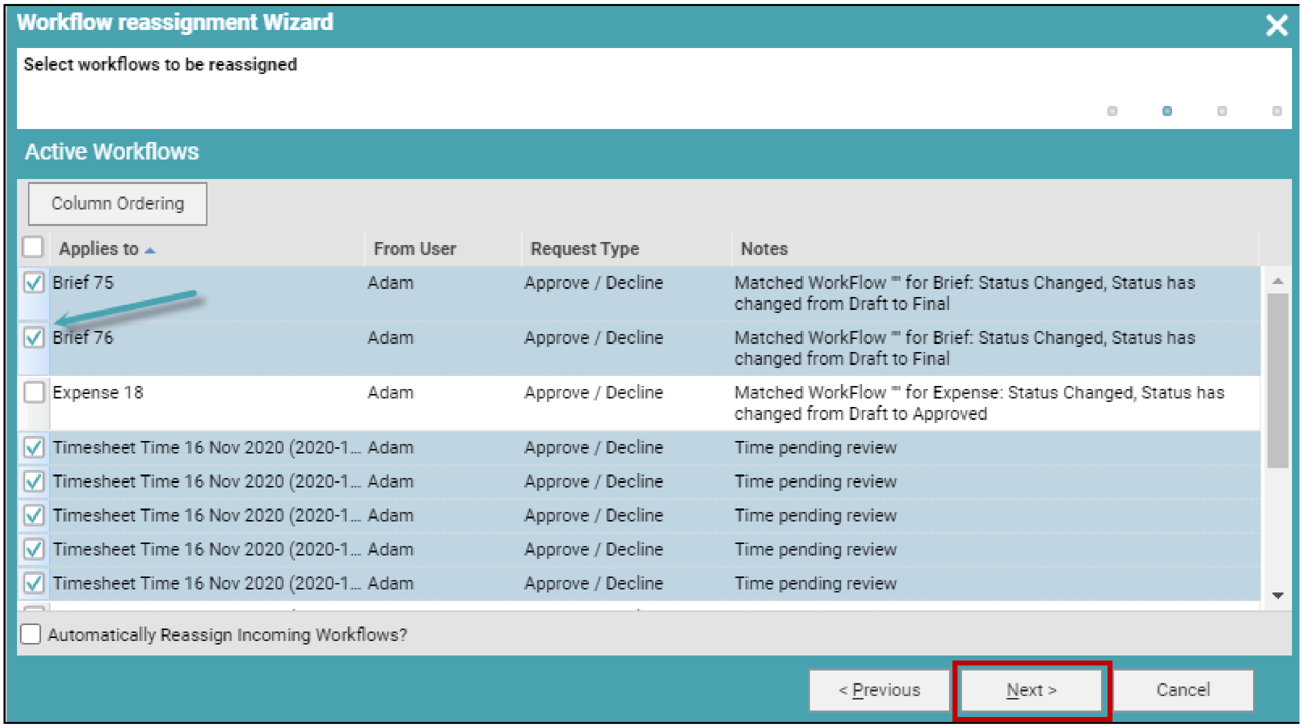
2. The *Select a Chase Wizard to begin* dialog appears. Click the **Reassign Workflow** wizard.



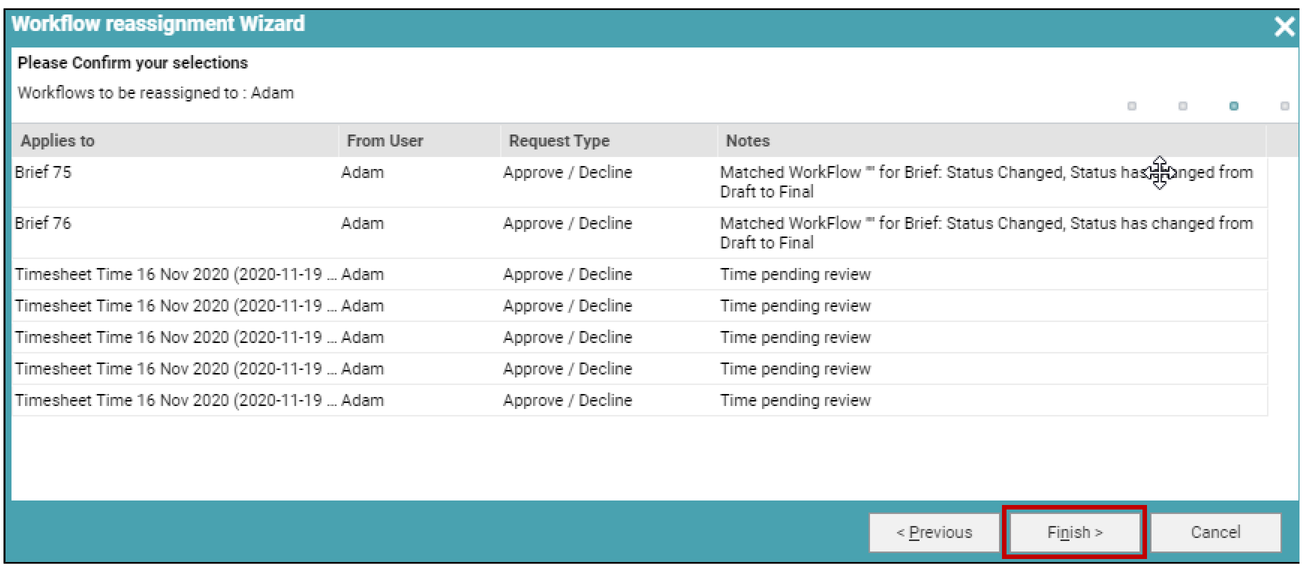
3. On the *Workflow reassignment Wizard* dialog, click on the **User with Workflows that should be reassigned** field, and select the appropriate user.
4. Click on the **User to Assign selected Workflows to** field and select the appropriate user.
5. Click the **Next** button.



6. A list of all workflows appear. Check the checkbox next to the workflow that needs to be reassigned, or select all workflows by checking the checkbox next to the **Applies to** column.
7. Once satisfied with your selection, click the **Next** button.



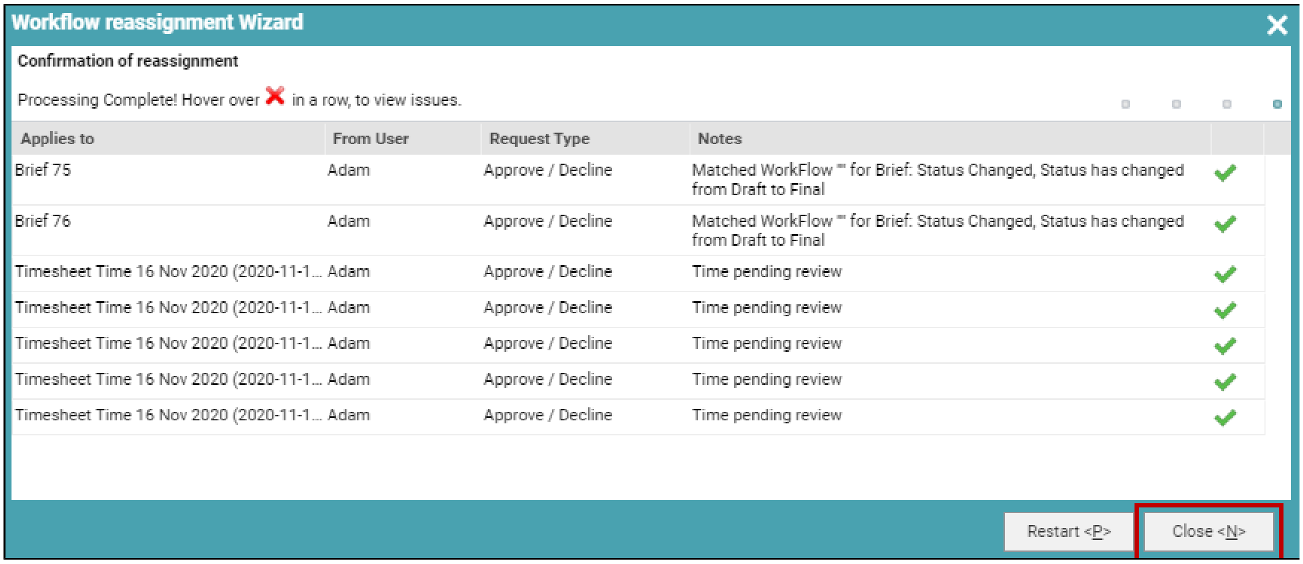
8. Click the **Finish** button to apply the changes.



9. Click the **Close** button to complete the process.

A green check mark next to a line means that the process was successful.

A red X mark next to a line means that the process was unsuccessful. If you hover over the X mark you will be able to view details about the issue.



Cancelling a Workflow

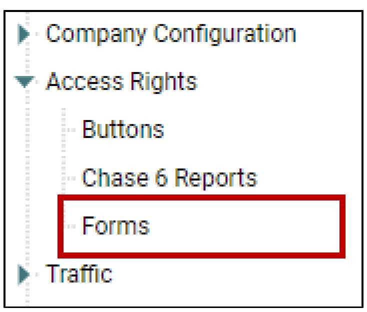
There are two steps to cancelling a workflow:

1. Setup the correct user right to use the wizard
2. Use the Cancel Workflow Wizard

Over time, you might end up with a number of unnecessary workflows in progress, due to setup issues or staff turnover. In these cases, it might be necessary to cancel these workflows in bulk. The Cancel Workflow Wizard will need to be set up so that the appropriate user will be able to run this wizard.

Setting up the correct User Right

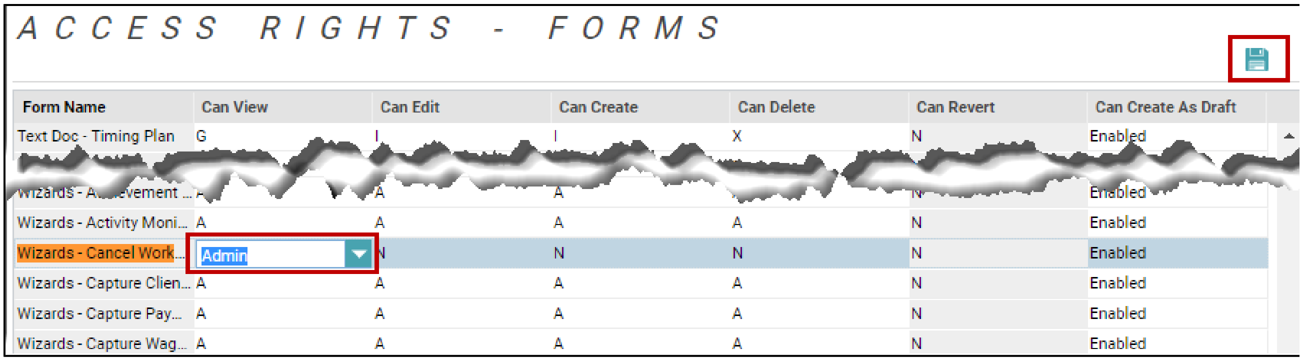
1. Navigate to **Settings,** click the **Access Rights** group to expand it, and select **Forms**.



2. Search for **Wizards - Cancel Workflow**, and ensure that the **Can View** column is set to the desired user right.

> It is recommended that the user right selected should be that of the User who sets up the workflows for your company. In most cases, the Administrator will be the one configuring workflows.

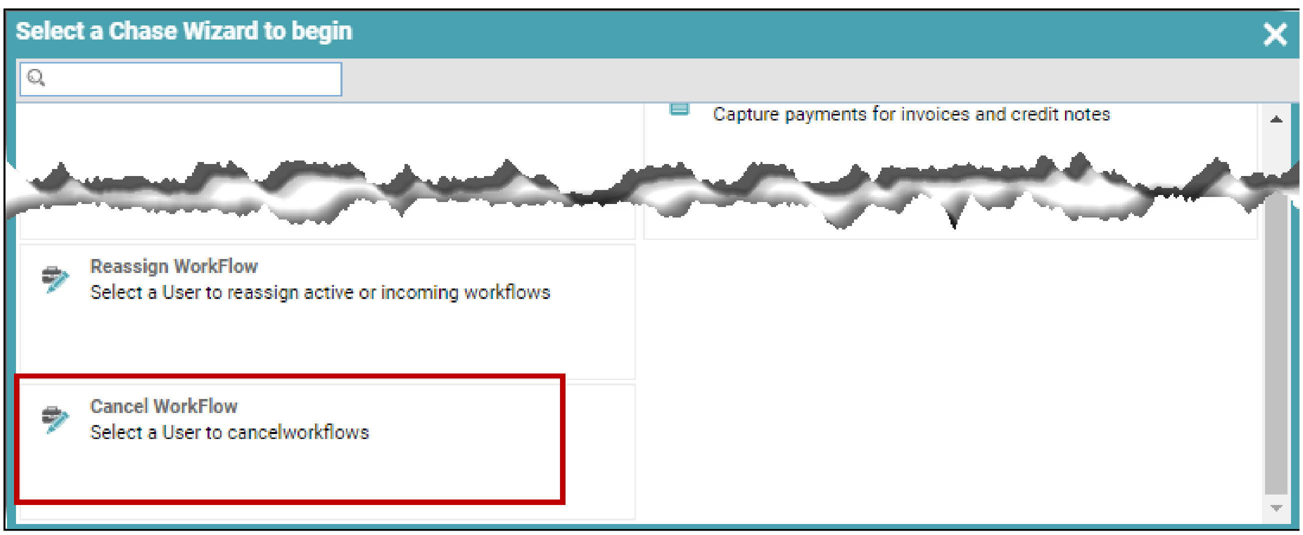
3. **Save** changes made to the screen.



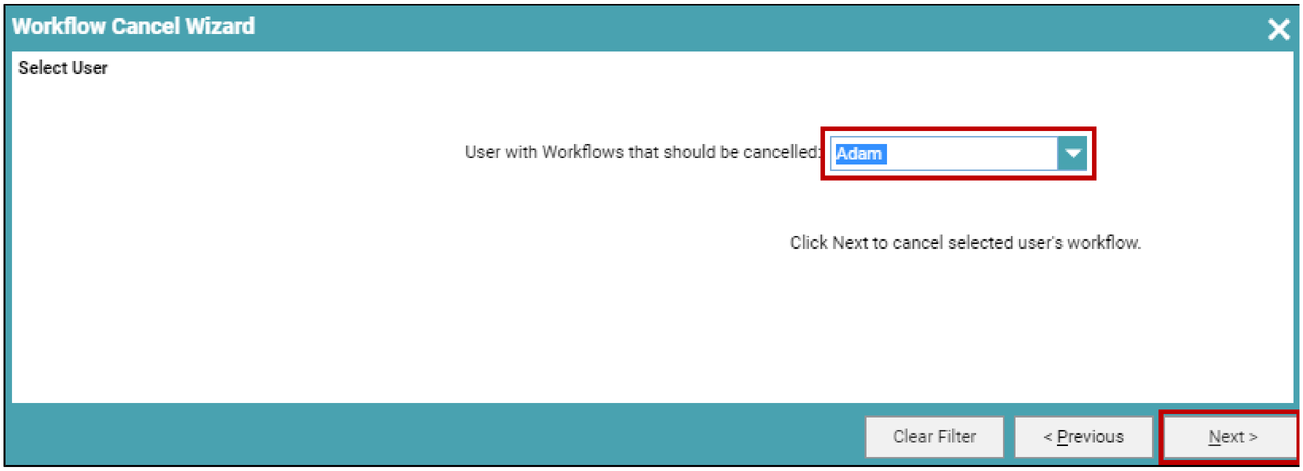
Using the Cancel Workflow Wizard

1. Click the **Wizards** button on the ribbon.

2. The *Select a Chase Wizard to begin* dialog appears. Click the **Cancel WorkFlow** wizard.

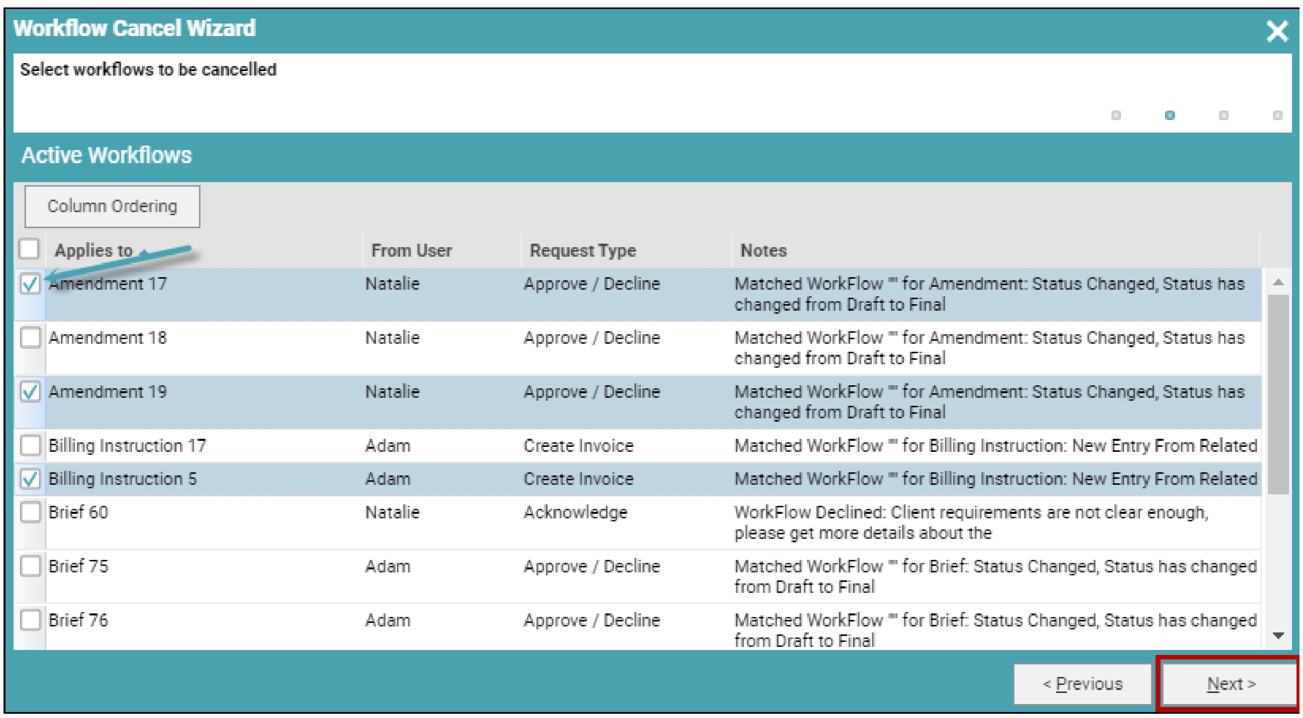


3. Click on the **User with Workflows that should be cancelled** field, and select the user for whom you want to cancel workflows.
4. Click the **Next** button.

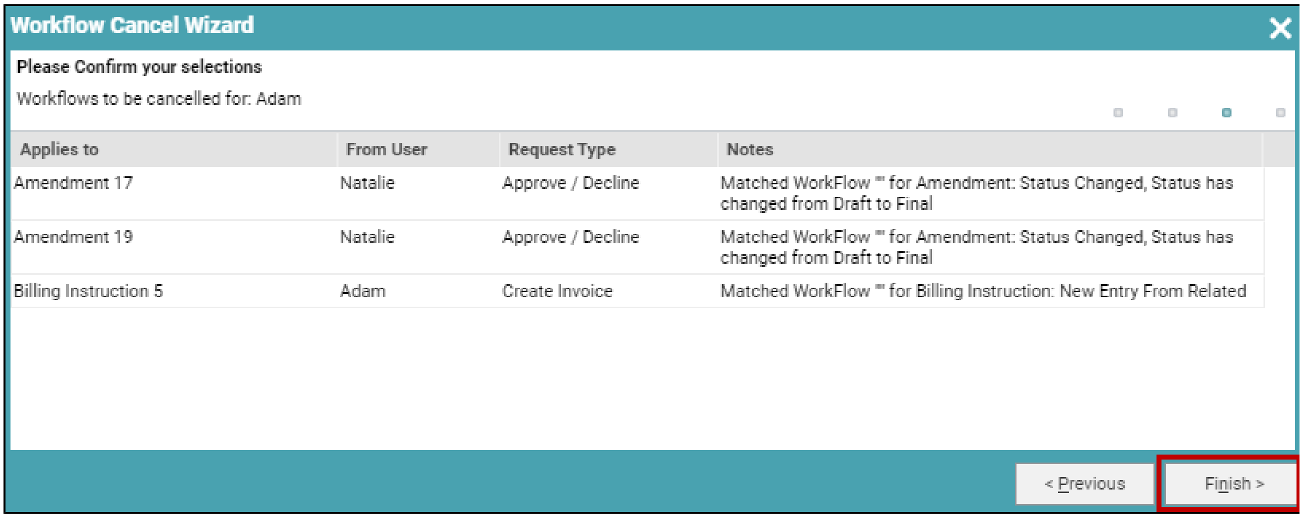


5. Select the checkbox next to the specific workflow(s) to be cancelled and click the **Next** button.

Select the checkbox next to the **Applies to** column to cancel all workflows for a user.



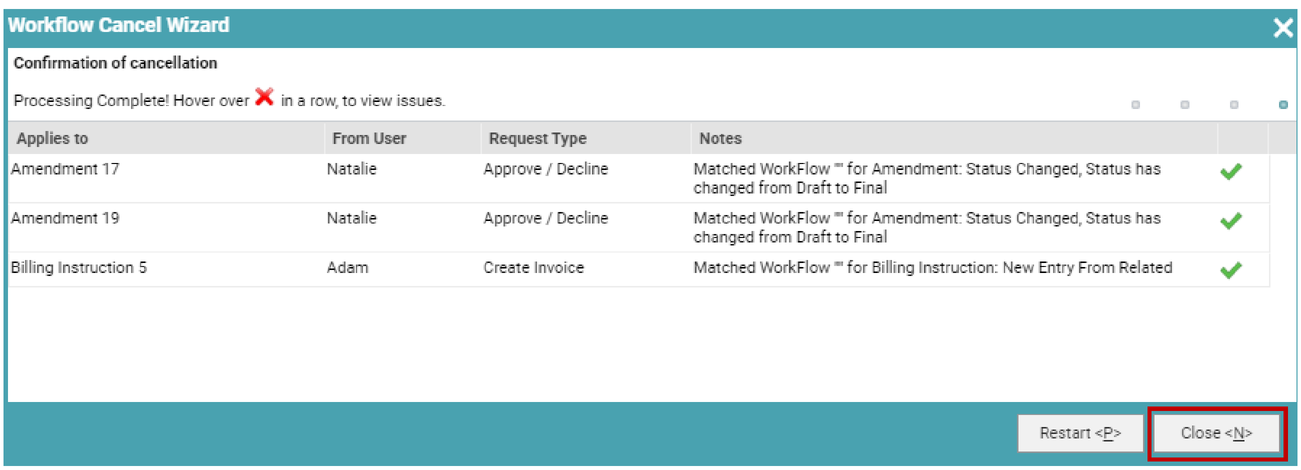
6. Click the **Finish** button.



7. Click the **Close** button to close the wizard, or click the **Restart** button to begin the cancellation process again.

A green check mark next to a line means that the process was successful.

A red X mark next to a line means that the process was unsuccessful. If you hover over the X mark you will be able to view details about the issue.



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