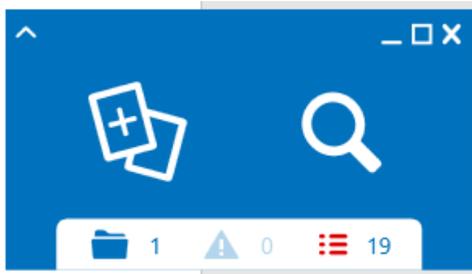## WORKING WITH WORKFLOWS IN SMARTDOC

WHAT IS A WORKFLOW?

A workflow demands an action from the user. The user has to indicate he has read the document (a notification) or he has to indicate if he agrees with it or not (an approval).

HOW DO YOU KNOW THERE IS AN ASSIGNMENT FOR YOU?

When you have a workflow assigned to you, you get a number on the right bottom side of your SMARTdoc.
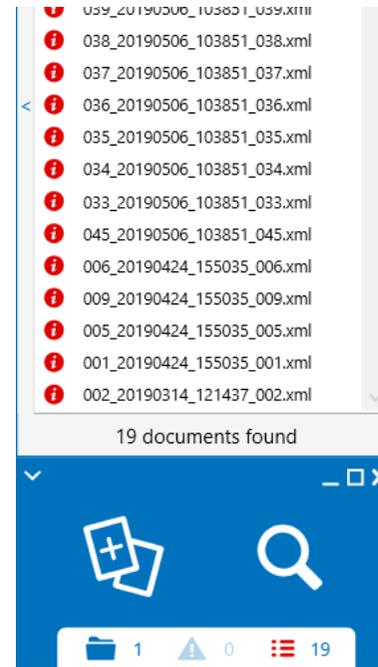

The indication can have different colors:

- Green means you still have enough time to react
- Yellow (orange) means you have to react today
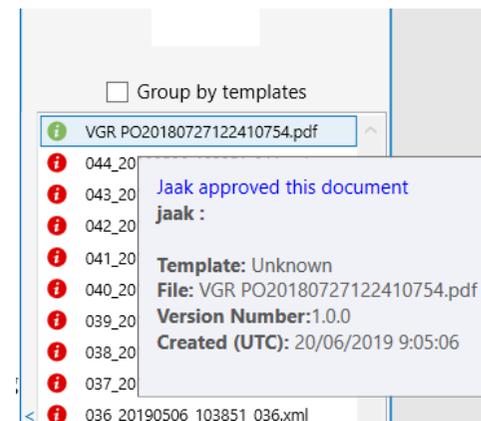- Red means you were too late to react

The numbers indicates how many assignments you have.

REACT ON A NOTIFICATION

You click the number and get a list of actions.

19 documents found

When you hoover the mouse over the indication, you get a text message provided by the creator of the template.

Group by templates

VGR PO20180727122410754.pdf

Jaak approved this document

jaak :

Template: Unknown
File: VGR PO20180727122410754.pdf
Version Number: 1.0.0
Created (UTC): 20/06/2019 9:05:06

To indicate that you have read the message, you right click on the indication and choose: 'Mark as read'.
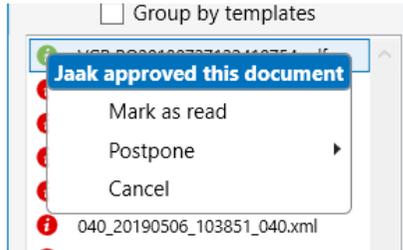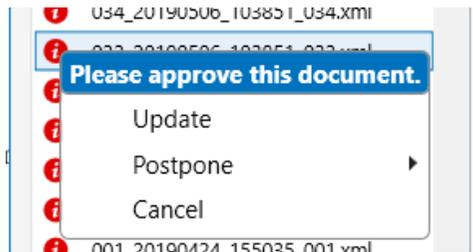

The notification will disappear.

REACT ON AN APPROVAL.

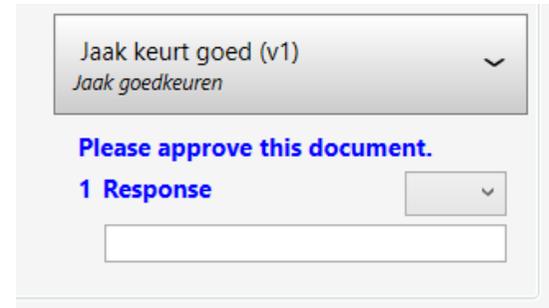When you have an approval, you must do a bit more.

When you right click the indication, you get a message 'Update'.

The SMARTdoc update screens open.

ACCEPT THE APPROVAL

In the update screen, you see the part 'Workflow'. In that part you see the Flow Index.
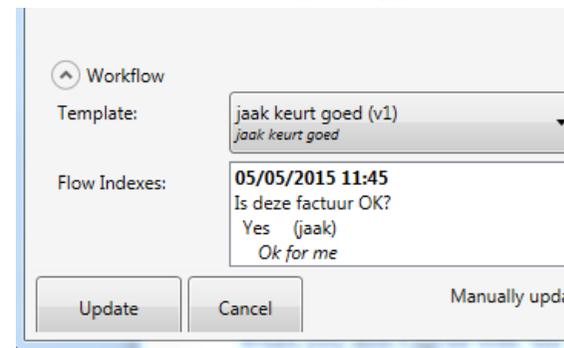

To approve the document, you choose 'Yes' as response and 'Update' the document.

REJECT THE APPROVAL

When you don't agree with the document, you select 'No' as an option and add the reason why in the response line.

RESULT OF AN APPROVAL

When you look at a document with an approval, you can see all steps and comments made during the approval.
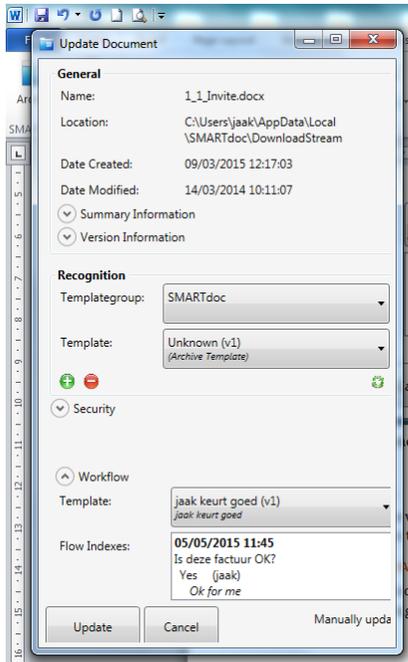

In the example above, you see that Jaak agreed on the document on 05/05/2015 at 11:45. The text he added is 'OK for me'.

CHANGING THE WORKFLOW TEMPLATE

What to do when a workflow is wrongly assigned to you?

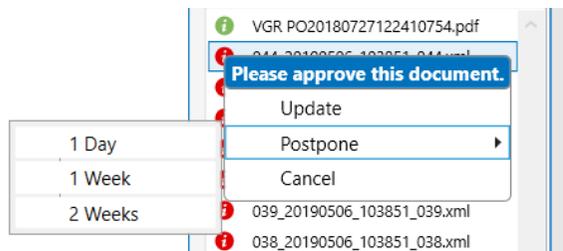When you update the document, you can choose another workflow template.

This can only be done when you have enough rights.

POSTPONE A WORKFLOW

Right click on a notification bullet.

Choose 'postpone'.

You can postpone the flow by one day, one week or 2 weeks. The flow disappears and will come back after the indicated time.