Workflow Fundamentals

Introduction

Epicor ECM's Workflow system digitizes business processes that traditionally relied on paperwork.

While many of these tasks are performed automatically, you may occasionally need to provide some information to keep things moving.

This may include performing actions like entering a total, adding a keyword, approving, or denying a purchase order or invoice, reviewing and emailing records, or adding an annotation and forwarding your notes.

In this course, we'll show you everything you need to know about how to process your content with Epicor ECM.

We'll provide an Overview of Workflow, including quick descriptions of the components you can interact with, Show you an example of how to locate your Workflow items, how to process them, and provide some guidance on how to best use the available tools to streamline *your* workflow experience.

Along the way, we'll show you useful tricks and suggestions that can aid in keeping your processes on track.

Workflow Overview

A new copier arrived, and along with it came an invoice.

You've been tasked with getting it approved.

As the **owner** of this workflow, you need to ensure that your IT department's manager approves it.

This workflow may consist of several key points, or **steps**, like sending it to the manager, the manager approving it, and the approval being recorded.

A step may consist of one or more **actions**.

For example, the step of sending it to the manager would involve the actions of identifying the manager, delivering it to them, and if necessary, notifying them.

While you are the owner of this workflow, you can't complete it alone.

Certain **steps** or smaller **actions** may need to be assigned to other members of your team.

The workflow may also have a **priority** and a **due date**—and once each step has been completed, the workflow is finished.

To sum up everything so far, a workflow consists of series of defined **steps** comprised of **actions**, has one or more **owners**, one or more **assignees**, may involve an **approval process**, and likely also has a **priority** and a **due date**.

To see all this information for your workflows, log in to **Epicor ECM** and click **Workflow**.

Tap the right arrow icon to continue.

The Workflow Queue

Workflow items assigned to you, or your team can be found either in your Inbox as a list or in a detailed and easily sortable grid, called your **Workflow queue**—or depending on your role, your **Approvals queue**, both found in the **Workflow** screen.

By default, you'll see all workflows you have access to, and you'll be looking at your **queue**.

To reduce your filter to view a particular workflow, use this dropdown.

If you need to look at another team member's queue and have access, you can use this filter.

Whether you're here to process items or approve or deny them, the **workflow queue** and **approval requests** panels show items awaiting your input.

By default, the first item is automatically selected in these panels.

A **preview** of the selected item displays on the right.

You can sort these grids to your liking. To sort by workflow, due date, or priority, tap the appropriate column's **header** to sort first to lowest to highest or highest to lowest.

You can also sort by **workflow**, the **title** of the item, or any other criteria in the grid.

You can also see and sort by approval status with the **Approvals** column, and easily see who currently is the owner, assignee, and requested approver.

You can further customize your view by choosing which columns to display and their order using the **column chooser**.

Filter for the information you need, drag it in, arrange it, and tap **Save**.

Limit your view of workflow items assigned only to you by tapping actions and toggling the "**Exclude Groups**" option.

Open your workflow items or approval requests by selecting one or more items.

Click the **checkbox** to select an item, or control-click to select multiple items.

Tap **Actions**, then **view**.

Additionally, you may receive notifications about workflow items or approval requests by email.

Often, these email alerts may contain links to the documents in question and can take you directly to them.

Always be sure you recognize the sender and never click on any suspicious emails.

Processing Content with Workflow

Once you've opened an item assigned to you in workflow, you'll see it in the **document viewer**.

An image of the document appears to the right, and several **accordions** containing information and tools for this document appear on the left.

These can be **expanded** or **collapsed**, or displayed **laterally** across the bottom of the screen, which may be useful if you need to review or edit line items.

We recommend dragging the **Workflow** accordion to the top.

Should you need to leave notes for your team members, the **History** accordion displays chat messages and a recorded audit of this item's workflow history.

Content Fields shows useful document metadata and **Related Documents** may show documents that are defined as related to this document through matching data found in the **Content Fields** accordion.

Let's focus on the **Workflow** accordion.

The Workflow accordion displays the **name** of the current workflow processing this item, the current **step**, **action** being performed, and **assignee**.

Below this are **controls** to interact with the workflow, and—at the bottom of the workflow accordion—the **chat tool**, which you can use to leave notes for your team.

These notes can later be found in the **History** accordion's **Chat** section.

In this case, we're being asked to choose the person who needs to approve this invoice.

Required information is notated with an **asterisk**, as you can see to the right of this dropdown.

Make a selection from the menu and use the **Submit** button to **finish this action**.

You can customize the Submit button's behavior by clicking the **arrow** next to it.

If you typically process several items in one batch, selecting **Submit and move to next** will automatically move you forward to the next item you opened from your workflow queue.

Select this option to return to your Workflow queue, the retrieve screen, or whatever screen you were on after you've finished all actions assigned or steps to you.

Note that the **Save** button is only used to make changes to the document or metadata like line items or keywords and has no effect on the workflow process.

In the case of this workflow, once you **select** the next approver and click **submit**, you're done.

The approver receives an email, logs in either by clicking the link in the email or opening it from their Approval Requests panel, and sees it.

In the approver's workflow accordion, they see the approval controls, enter their information, and click **Approve**.

If there are more steps or additional assignees or approvers, the document continues along the path until it **finishes** the workflow.

Workflow Notifications

When a workflow item is assigned to you, it not only appears in your queue, but you can also build rules to customize how the system will alert you with the **Notifications** system.

To create your Workflow notification rules, tap the **gear** icon next to Work Items.

To create a rule, enter a name in the **Select Rule** dropdown.

After you've saved your rules, you can always select them here to modify them later.

Choose whether you'd like a simple count of items in each workflow by selecting Summary or build a customized report with the details you need by choosing **Full**.

Let's **name** this Invoice Notifications and set it as **Full**.

Next, select the **details** you'd like to see in your alert email.

Use the **text box** to filter for the fields you need. Let's add the Invoice Date, Due Date, and the assignee.

Click **plus** to add a field or **minus** to remove it. **Click and drag** to order your fields.

Next, choose how the items should be **sorted** in the email. Let's sort by oldest items first.

We'll sort by Invoice Date, Ascending.

Do you want to view all items for groups you're a part of? Or your own assignments? Check the **Exclude Group** box to only show items assigned specifically to you.

Remember, you can create multiple rules, so you can have both if you build a rule for each.

If you only want to be alerted about new items, select **New Only**.

Selecting **All** will show you everything currently in your queue, regardless of age.

Similarly, decide if you want to be contacted if there are no items.

If your account can view other team members workflows, you can specify which user's **queue** you'd like to monitor here.

Similarly, should you want to limit this to a report about a singular workflow, use this dropdown to specify which **Workflow** you'd like alerts for.

If you're editing an existing rule, you'll see the date the last notifications were sent here.

By default, workflow alerts are limited to showing 50 items, but you can raise or lower that number here.

To disable or enable a rule, toggle the **Active** checkbox.

Finally, establish a **schedule** for your rule.

Let's set ours to be generated **7:30** every morning.

Tap **Run Now** to test your rule or **Save** to finish.

To return to the Alert builder, tap the **gear**.

Use the Select Rule dropdown to edit your rule and tap **save** or **delete**. Click cancel to close the **Alert builder**.

Tap the right arrow icon to continue.

Course Recap

You now know the fundamentals of the Epicor ECM Workflow System.

You should now be able to explain the relevant components, capabilities, and terms of Workflow.

Use your Queue or Approval requests to monitor the items awaiting input from you.

Process content with the Workflow Accordion in the document viewer and remember that the submit button completes your action.

Finally, use the Notification system to build customized email alerts that keep you up to speed with the information you need.

About Epicor

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