Workflow Tools

Introduction (0:07)

(0:07) The workflow system offers some controls and tools to help you make the activity of processing your content easier.

We'll discuss how to restart, change, and reassign workflow items, designate an out of office recipient for your assignments, and adjust due dates and priorities.

Choose a topic or tap the right arrow icon to continue.

Workflow Actions

(0:42) Usually, your queue will display relevant items, but errors and mistakes can happen.

You may need to assign an item to a different workflow, start the workflow process over, or send an item to another teammate for processing.

While viewing a workflow item, tap the **Actions** menu.

Hover over **Workflow** to see a list of workflow-related actions.

We'll explore each option and provide guidance on each.

If an item was categorized incorrectly when it came into the system, it may have been assigned the wrong workflow.

Tap **Assign Workflow**.

Using the **Name** dropdown, you can select a different workflow to assign this item to.

Since we're viewing an invoice and this was assigned to our purchase order workflow, we'll select the Invoice workflow and tap **Assign**.

(1:34) You'll see a brief success message and the **Change Workflow** window will close.

If the item is incorrectly assigned to you and needs to be assigned to a teammate, tap **Actions**, hover over **Workflow**, then tap **Change Assignee**.

You can assign a workflow item to either an individual user or a group using this dropdown.

Chose the assignee, and if you'd like the system to email them a notification about the item, check **the Send Email** box.

Tap **Assign**.

If your workflow has reached a state where you need to start it over, tap **Actions**, hover over **Workflow**, then tap **Restart Workflow**.

(2:25) In the popup window, tap **Restart Workflow**, and the workflow process will start over from the beginning.

If you need to perform any of these processes with multiple items at once, you have access to these controls from your **Workflow Queue** as well.

Select the items, tap **Actions**, then hover over **Workflow**.

From here, you can easily re-assign items to different workflows, change assignees, retry exceptions, terminate the workflow process, or remove an item from workflow.

If you're unsure of how these actions may affect your processes, check with your Epicor ECM system administrator before attempting changes.

Tap the right arrow icon to continue.

Out of Office Forwarding

(3:19) It's important to disconnect when you're away from work.

You can forward your workflow assignments and approval requests to a teammate **with Out of Office Workflow Assignments**.

Hover over the ECM menu and open User Preferences.

Tap Environment.

In the **Out of the Office Forwarding** dropdown, select the user or group you'd like to designate as your recipient while you're away.

Tap **save** and this user or group will receive all your new workflow assignments and approval requests.

(4:00) This will not reassign your current workflow items, so you'll want to either finish them or reassign them manually before you leave.

Out of Office Workflow Assignments may be "**daisy chained**", so if your designated recipient needs to take time off, they can set a recipient for themselves, and your assignments will bypass them and go to the user or group they've designated.

Remember to **disable** your Out of Office forwarding when you return.

Turn it off the same way you turned it on; hover over the **ECM menu** and open **User Preferences**.

Tap **Environment**.

In the **Out of the Office Forwarding** dropdown, select None, then tap Save.

Now, new workflow assignments and approval requests will now show up in your queue.

Due Dates and Priority

(4:54) Typically, a Due Date and Priority will be automatically established by a document's workflow, but deadlines can change, and priorities can shift.

While an item's Priority is useful for sorting and planning, no functionality is tied to this feature.

Due Dates, on the other hand, will send an email to your workflow's administrator if the item does not complete its workflow prior to the established Due Date.

You can **override** default Due Dates and Priorities for items in your workflow queue in a few simple steps.

While viewing a Workflow item, tap the **Actions** menu, then tap **Set Due Date**.

In the **Set Due Date** popup, use the calendar picker and time sliders to establish a new due date.

Click **Close**, then click **Ok**.

(5:45) If we expand the **Content Fields** panel, we can see your document's new **due date**.

Again, if this item's workflow isn't finished by this new date, your workflow administrator may receive an "overdue workflow notification" email from the system.

Priority can be set—like Due Dates —from your **Workflow Queue**.

Select the items you'd like to adjust, tap **Actions**, then **Set Due Date** or **Set Priority**.

Tap **Set Priority**, then choose the priority for the items you selected: low, normal, or high.

Tap **Ok**.

You can now prioritize and adjust due dates for your workflow items.

Tap the right arrow icon to continue.

Course Recap

(6:34) In this course, we demonstrated how to make use of the Workflow **Actions** menu to reassign workflow items to other team members or groups, restart, change, and terminate workflow processes, showed you how to establish out of office workflow assignments, discussed how you can override default due dates and priorities-- and organize your items by importance

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