PRIME GOV

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Workflow Updates

Updated June 30 2021

In PrimeGov, we are focused on providing the best service and our customized workflows are no exception. In Q1 and Q2 of 2021 we are increasing the features offered with our workflow builder, add support for:

- Split Workflow – allowing for a single selection from a user to initiate two or more parallel workflow paths. This supports multiple groups working simultaneously on the workflow item and speeds up processing time
- Dynamic Routing – allowing conditions to be set within each workflow step that can limit if a workflow route will be made available for selection or not
- Workflow Permissions – providing granular permissions for different users and user groups to each step of the workflow. We are also increasing support to adjust permissions during peer group definition and adding an option to allow access to 'My Department tasks'
- Deadlines – providing alerting and auto-route options for workflow tasks to ensure no deadline gets missed

We also reviewed our current workflow task list view and our peer review group set up and introduced multiple new enhancements to the features here

Contents

Split Workflow 2
  To Create a Split Workflow 2
  Alerts When Updating Content 3
Dynamic Routing (Route Options) 4
  To Add a Route Condition 4
Workflow Permissions 5
  Add Permissions to A Workflow Step 5
  Create Permission Set Template 6
  Import Permission Set Template 7
  Permissions In to Peer Review 7
  View My Department Tasks 8
Deadlines 8
  Add Deadline to A Workflow Step 8
Task List View Updates 10
  Updates to View Selections 10
  Filter Columns 11
  Customize Task List View 11
Peer Review Updates 13
  Assign to a Group In Peer Review 13

Split Workflow

Split workflow allows you to split a single route into multiple simultaneous paths. When the split route is selected by the user in the task, the multiple paths will each be initiated, resulting in multiple smaller sets of workflow tasks – following the relevant steps defined for each path. All paths **must** return to a single join location, where the workflow will wait until all paths have returned before proceeding with the next step in the workflow definition.

Dynamic Routing support allows the ability to add conditions to steps within the split paths, that will determine if an individual path will be followed or not. If the workflow does not meet the conditions laid out in the first step of the split path, that path will be ignored, no tasks will be created for that path, and the join location will not hold for completion prior to processing with the next step.

All existing workflow features and supports will remain as they are today, there are no changes to the base workflow functionality.

There are some limitations to consider when using Split Workflow:

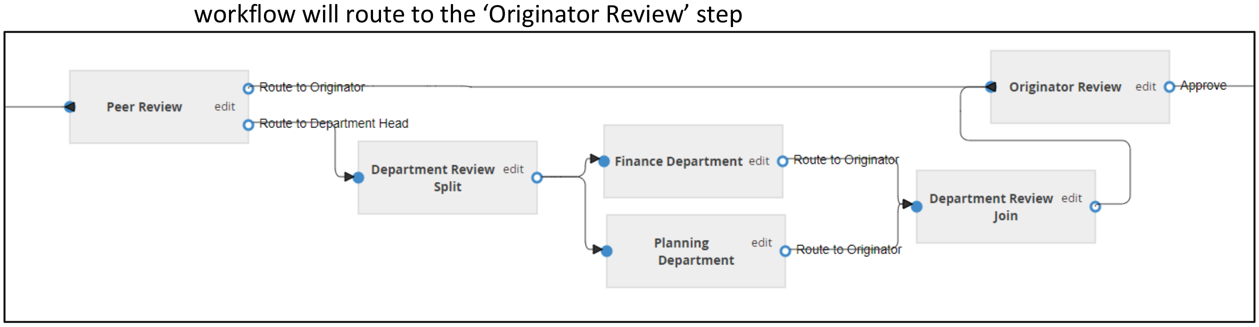
1. The split workflow must be separated from the rest of the workflow definition, and kept contained within itself, i.e. all paths within the split workflow are contained only in the split workflow and do not interact with the main workflow
2. All steps must return to the same join location
3. Steps from outside of split workflow cannot join into the split workflow steps
4. Steps from inside of the split workflow cannot join to other workflow steps

To Create a Split Workflow

1. From the route where a split workflow is required, insert a workflow step of type 'Split' as the first step
2. Route from the single exit of this workflow step to the first step in all required split paths
3. Generate the individual split paths using required workflow steps
4. At the point where all split paths combine, insert a workflow step of type 'Join'
5. Route the final step of each split path into this workflow step

In the example below:

5. From 'Peer Review' step
    1. 'Route to Originator' is a single path that routes to the 'Originator Review' step
    2. 'Route to Department Head' is a route that initiates a split workflow
        - 'Department Review Split' is step of type 'Split'
        - 'Finance Department' and 'Planning Department' are workflow steps on the split paths that both route from the split step
            - These paths only consist of a single step in the example below but could consist of multiple steps if required
            - Dynamic routing could be used to set route conditions on the 'Finance Department' and 'Planning Department' steps to only enter these paths if certain conditions are met
        - 'Department Review Join' is a step of type 'Join' where all paths from the split workflow route into to end
        - Once all paths on the split workflow reach the 'Department Review Join' step the workflow will route to the 'Originator Review' step



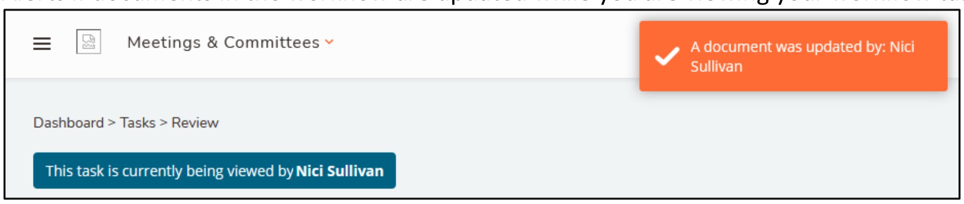
Alerts When Updating Content

As split workflow will support multiple sets of people working on the same item simultaneously, we are working to add additional support and alerts for users when the item they are viewing is being viewed by another user and when they attempt to update content in their task that is no longer the most recent version of the information.

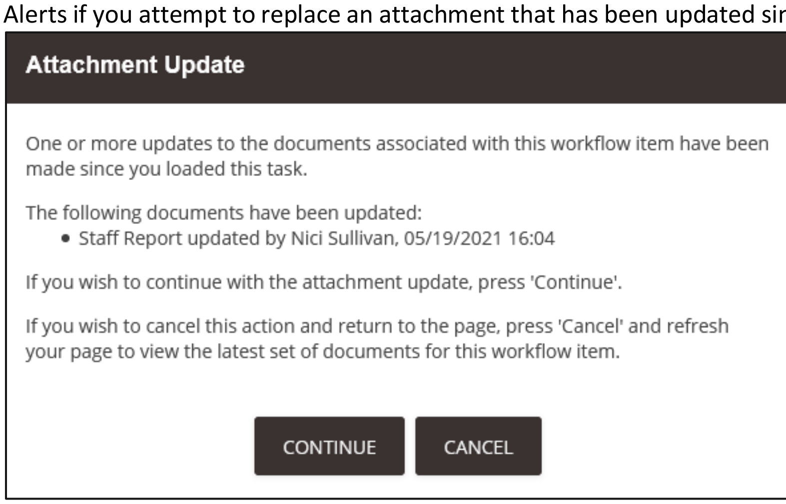
We have added four alert types:

1. A banner that appears within a task when more than one user is accessing the same workflow. This includes workflows that are in peer review or a split workflow where users maybe accessing different tasks belonging to the same workflow

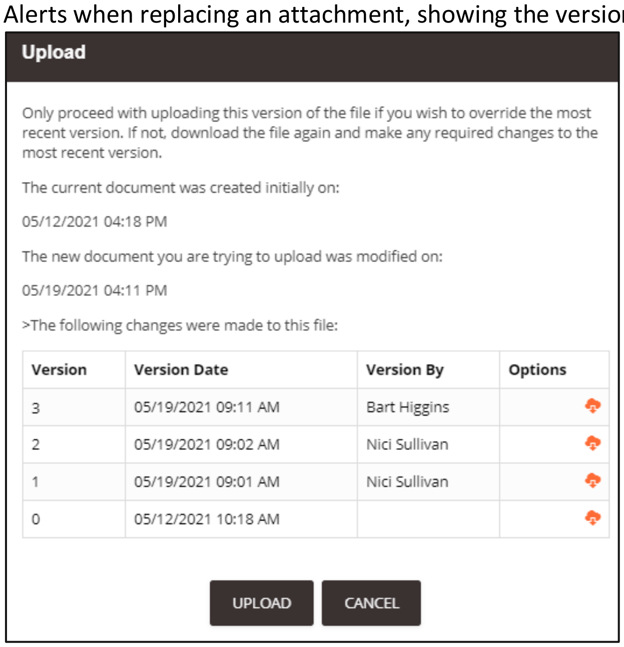
2. Alerts if documents in the workflow are updated while you are viewing your workflow task



3. Alerts if you attempt to replace an attachment that has been updated since you loaded your workflow task



4. Alerts when replacing an attachment, showing the version history of the attachment overall



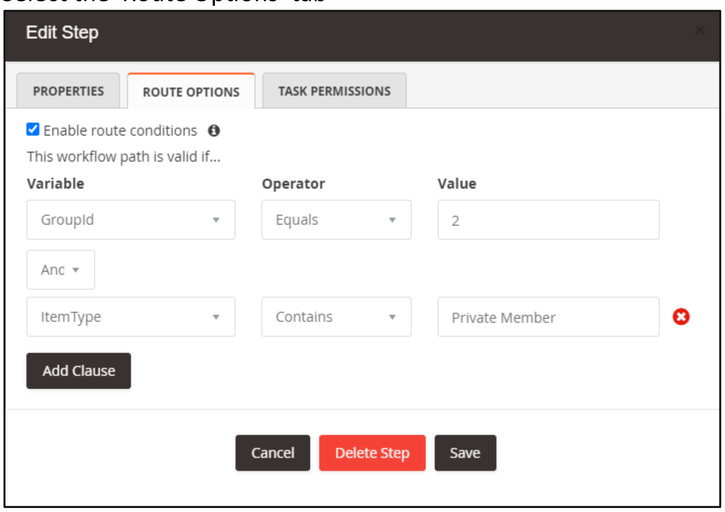
Dynamic Routing (Route Options)

Dynamic routing allows for the optional inclusion of one or more conditions within a workflow step. These conditions are used in two ways:

1. When displaying route options to a user in a workflow task – only route options where the conditions of the ***resulting*** workflow step are met are displayed for selection
2. When routing to a split workflow – only split paths where the conditions of the first step in the path are met will be followed. For paths not followed, the join location will not wait for this path to complete prior to moving forward with the workflow
    - If all split paths are not valid due to route conditions, the route option for the split will not be displayed in the preceding task

To Add a Route Condition
Note: Conditions for routes are set to allow or block access ***into*** a workflow step and so are added in the ***destination workflow step***. Conditions will show or hide route options from step A to step B based on the route conditions set in step B.

1. Open the required workflow step
2. Select the 'Route Options' tab



3. Select 'Enable Route Options'
4. Each route condition is built using
    a. Variable – choose from the available workflow variables
    b. Operator – choose from 'Equals', 'Greater than', Less than', 'Greater than or equal to', 'Less than or equal to' or 'Contains'
    c. Value – the value to use with the condition
5. Multiple conditions can be combined by selecting 'Add Clause'
    a. Select the required clause connector – 'And' or 'Or'
    b. Add an additional route condition
6. Conditions can also be updated and removed easily from here
    a. Note: Only second and subsequent clauses can be removed, to remove all clauses disable the 'Enable route conditions' for the step
7. Select 'Save'

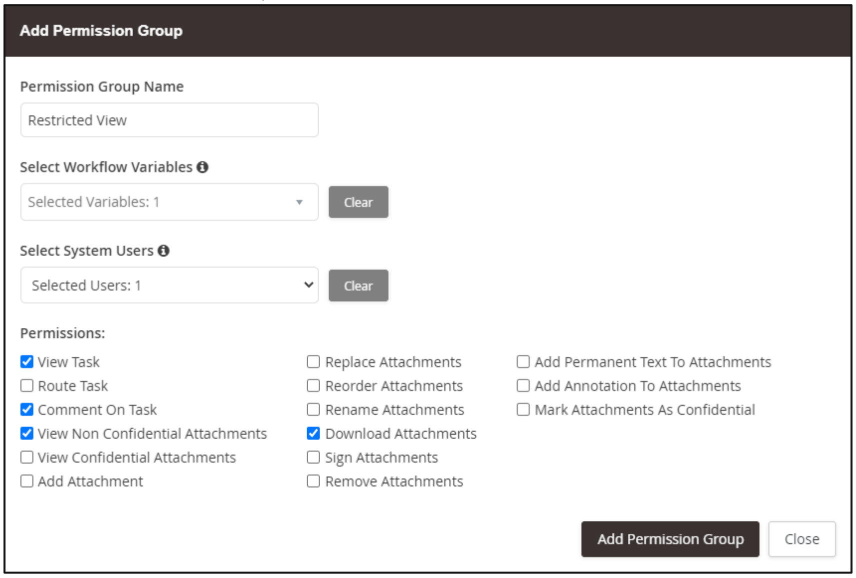
Workflow Permissions

Workflow permissions allows the workflow admin user to define permissions within each step. Multiple permission groups can be defined within each workflow step, allowing the user to set different levels of permission for a single step. Each permission group includes details on the user, user groups or user-based workflow variables that belong to the permission group and also the relevant permissions that have been allowed for these users.

Add Permissions to A Workflow Step

In the workflow definition, each workflow step now contains a new tab 'Task Permissions'. Multiple different permission groups can be added to each step. To add a new permission group:

1. Select 'Add Permission Group' within the tab

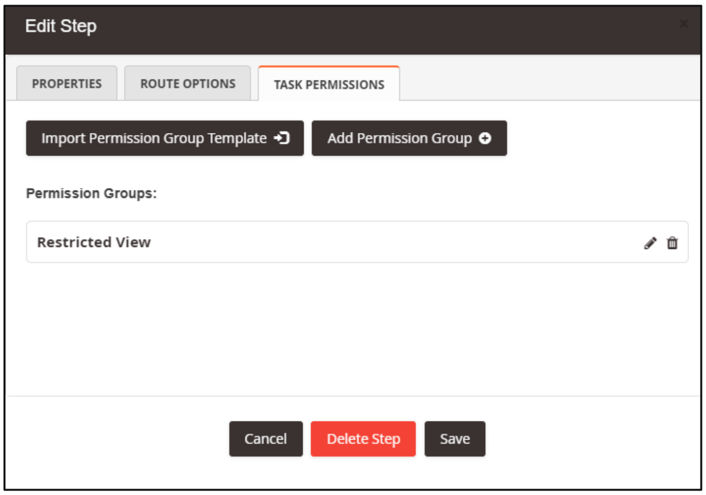


   a. Provide a name for the group in 'Permission Group Name'
   b. Select relevant workflow variables that related to users or user groups in the system – for example Originator
      i. In a Peer Review step, the 'Peer Group' variable can be used to set default permissions for the Peer Review Group defined in the workflow instance, see Permissions In to Peer Review below
   c. Select additional system users if required – multiple system users can be added to each permission group
   d. Select relevant permissions for the permission group
      - View Task – users with the URL for this task can access the task, based on additional permissions added. *Note: Unless assigned directly to the task, these users will NOT see this task in their 'My Tasks' list*
      - Route Task – allows the user to view available route options and route the task to the next step
      - Comment on Task – provide access to add a new comment to the workflow
      - View Non Confidential Attachments – allows the user to view all attachments that are not marked as confidential
      - View Confidential Attachments – allows the user to view all attachments that are marked as confidential
      - Add Attachment – allows the user to add a new attachment to the workflow task
      - Replace Attachments – allows the user to replace an existing attachment in the workflow task, based on the attachments they have been granted access to view
      - Reorder Attachments – allows the user to reorder existing attachments in the workflow task, based on the attachments they have been granted access to view
      - Rename Attachments – allow the user to rename existing attachments in the workflow task, based on the attachments they have been granted access to view
      - Download Attachments – allows the user to download existing attachments in the workflow, based on the attachments they have been granted access to view

- Sign Attachments – allows the user to add signatures to attachments in the workflow task, based on the attachments they have been granted access to view
- Remove Attachments – allows the user to remove attachment from the workflow task, based on the attachments they have been granted access to view
- Add Permanent Text to Attachments – allows the user to add permanent text to the attachments in the workflow task, based on the attachments they have been granted access to view
- Add Annotation to Attachments – allows the user to add annotations to the attachments in the workflow task, based on the attachments they have been granted access to view
- Mark Attachment as Confidential – allows the user to mark as attachment in the workflow task as confidential, based on the attachments they have been granted access to view

e. Select 'Add Permission Group'

2. The permission group appears on the 'Permission Groups' list on the step and can be updated or deleted from here

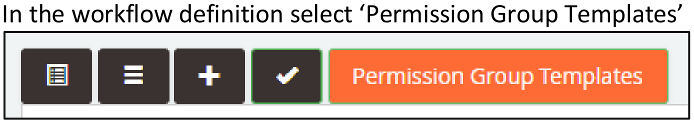


3. Select 'Save' to save the step updates
4. Tasks that are created as a result of this workflow step definition will obey the permissions set. Where a user is selected in more than one permission group, they will receive a combination of all enabled permissions

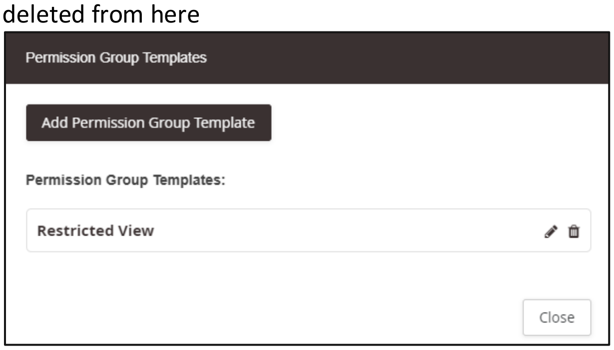
Create Permission Set Template

To provide for more efficient permission group set up in workflows where a common permission group is used in each workflow step, we have provided permission group templates. Permission group templates allow the user to define one or more permissions groups in the workflow and import it quickly and easily into the required workflow steps.

1. In the workflow definition select 'Permission Group Templates'

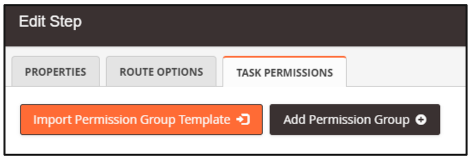


2. Select 'Add Permission Group Template'
3. Permission Group details are added as detailed above for Permission Groups
4. Select 'Add Permission Group Template'
5. The permission group template appears on the 'Permission Group Templates' list and can be updated or deleted from here



Import Permission Set Template

1. To use a permission group template in a workflow step, select ‘Import Permission Group Template’ from the ‘Task Permissions’ tab of the workflow step definition



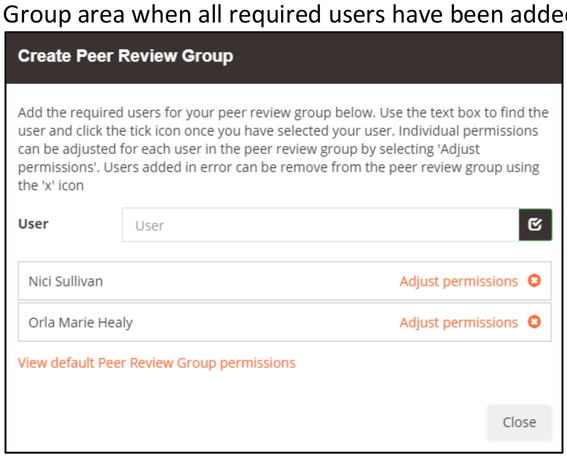
2. Select the required permission group template from the list provided and select ‘Import’
3. The selected permission group has been added to the workflow step
    a. Note: Once imported, changes made the original permission group template will not affect the imported template group in the workflow step
    b. Note: Once imported, changes made the imported template group in the workflow step will not affect the original permission group template

Permissions In to Peer Review

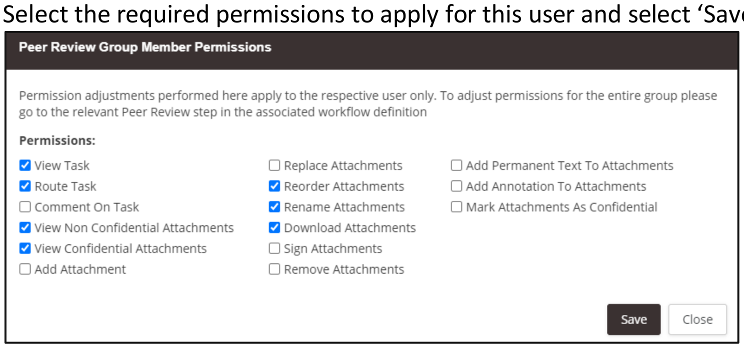
Default permissions for users added to a Peer Review Group in a workflow instance can be set by selecting the ‘Peer Group’ workflow variable in a permission group on the Peer Review step in the workflow definition. Users added to the Peer Review Group during the workflow instance will be assigned these permissions by default.

In addition to this, each user added to a Peer Review Group can be adjusted from this default set of permissions when the peer review group is created

1. When creating the Peer Review Group, add a user by typing in the ‘User’ area and selecting the tick icon, , to add the user to the Peer Review Group
    a. If you do not wish to adjust any permissions from default, select ‘Close’ to exit the Peer Review Group area when all required users have been added



2. To view the default permissions for the Peer Review Group select ‘View default Peer Review Group Permissions’
3. To adjust permissions for an individual user in the Peer Review Group select ‘Adjust Permissions’ beside the username
4. Select the required permissions to apply for this user and select ‘Save’



5. When all permissions have been set, select ‘Close’ to exit the Peer Review Group area
6. Permissions set here will be applied when the step is routed to Peer Review

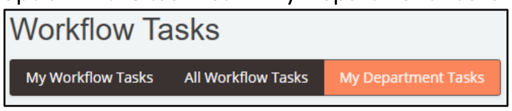
View My Department Tasks
A new permission has been added to the role permissions area that can allow members in a role to have access to all tasks assigned to other users within their department. Department is assigned to each user in their user profile using the 'Department' field.

<u>Add Permission to View My Department Tasks to a Role</u>

1. Open the required role from Admin -> System Administration -> Roles
2. Select the 'System Permissions' tab
3. Enable 'View All My Department Tasks'
4. Select Save

<u>View My Department Tasks</u>

1. Users assigned to a role where the 'View All My Department Tasks' permissions is enabled will see a new option in the task list – 'My Department Tasks'



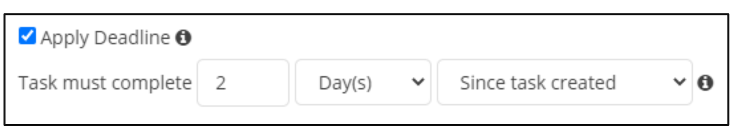
2. When this option is selected the user will see a list of all tasks assigned to users who belong to the same department

Deadlines

Deadlines allow the user to set deadline in the task and the option to take action when the deadline is reached. Deadlines can be set based on time passed since a task was created or time before meeting cut off. In addition, the deadline can be set to send emails and/or route the task to a new workflow step when the deadline is reached.

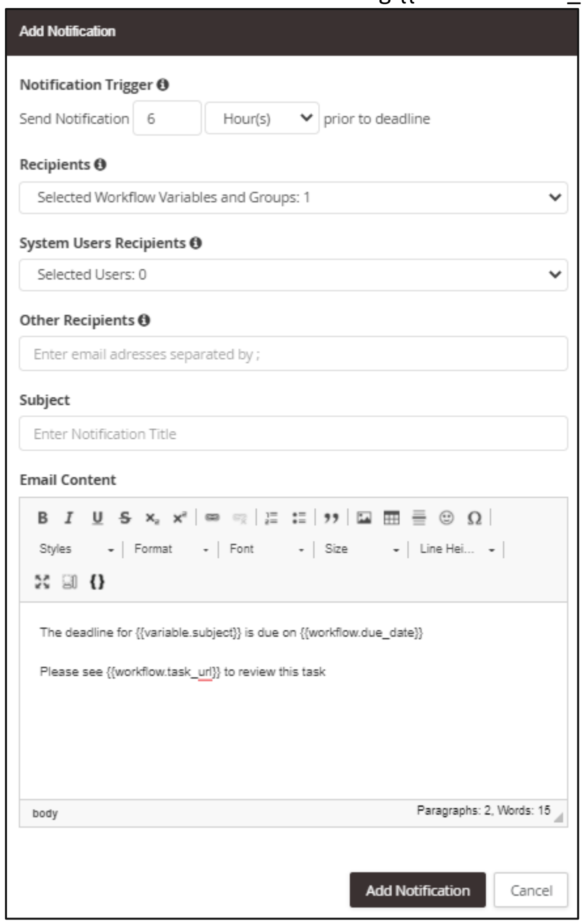
Add Deadline to A Workflow Step
In the workflow definition, each workflow step now contains a new tab 'Deadlines'. To add a deadline:

1. Select the 'Deadlines' tab in the step definition
2. Select 'Apply Deadline'
3. Add details for deadline criteria:
    a. Number - the required time for the deadline – for example '2' to create a deadline that is '2 days since task creation'
    b. Period – choose from
        i. Minutes
        ii. Hours
        iii. Days
    c. Reference – choose from
        i. Since Task Created
        ii. Before Meeting Cut Off

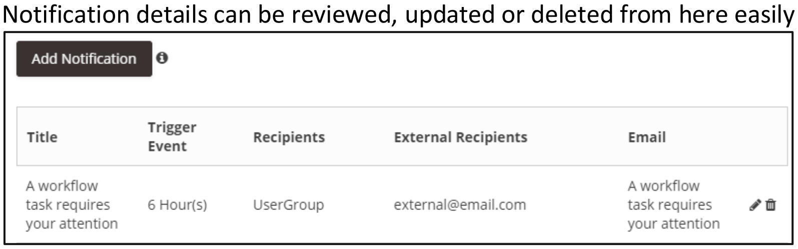


4. Select 'Add Notification' to configure an email to send when the deadline is reached
    a. Provide email details
        i. Trigger details – specify the number of days/hours/minutes prior to deadline to trigger the notification
        ii. Recipients –
            1. Recipients – select from workflow variables
            2. System User Recipients – select from all system users
            3. Other Recipients – enter external email addresses, separated by ;
        iii. Email Content
            1. Subject
            2. Email Content:

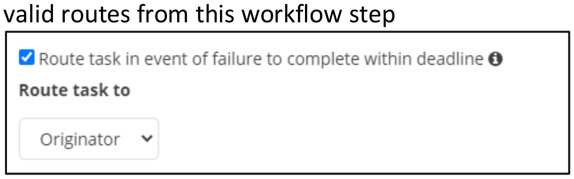
a. Refer to workflow variables using {{variable.*X*}} where X is the workflow variable name. Some variables have additional support
   i. User Id type variable
      1. {{variable.UserId}} will show the full name
      2. {{variable.UserId.FirstName}} will show the first name
      3. {{variable.UserId.LastName}} will show the last name
   ii. Group Id type variable
      1. {{variable.GroupId}} will show the group name
b. Refer to the task deadline {{workflow.due_date}}
c. Refer to the task URL using {{workflow.task_url}}



b. Notification details can be reviewed, updated or deleted from here easily



5. Enabled 'Route task in even of failure to complete within deadline' to route the task to the next workflow step if the task is complete when the deadline is reached
   a. Once enabled, select the required route from follow if deadline is reached. Options here will be all valid routes from this workflow step



6. Select 'Save' to save the step
7. As the workflow instance is running, tasks created from this step will have a deadline set based on the deadline criteria entered, and notifications and route options will be enabled if configured and the deadline is not met

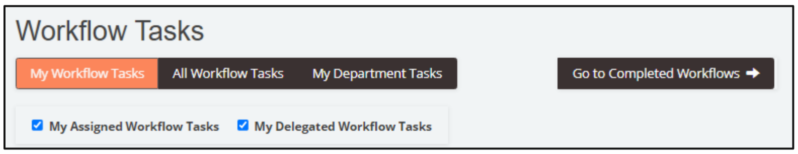
Task List View Updates

A number of updates have been made to the task list view, making it quicker and easier to locate your task

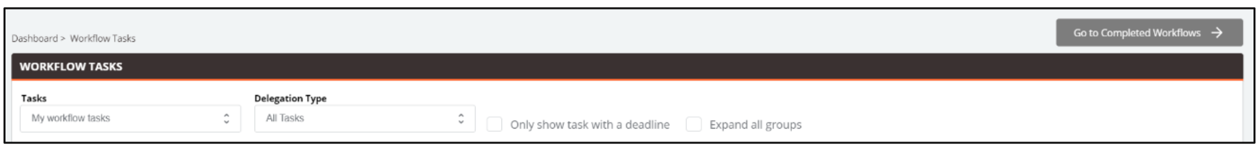
Updates to View Selections
We have made adjustments for how to navigate between the various task list options available

Previously accessible via buttons located along the top, navigation between various task list views is being moved to a clearer, more intuitive set of drop-down options

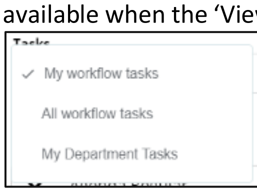
Adjusted from our previous view



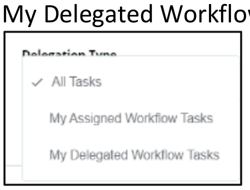
To this new view



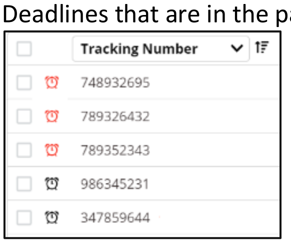
- Navigate different task lists from the ‘Tasks’ drop down, selecting from:
    - My workflow tasks – shows all tasks directly assigned to you, including any delegated task where the delegation type drop-down enables this
    - All workflow tasks – shows all task that you have access to view, including tasks directly assigned to you, any tasks where you have the permission to ‘View Task, and any Department Tasks, where the ‘View All My Department Tasks’ permission has been assigned
    - My Department workflow tasks – shows all tasks assigned to any user in your department, only available when the ‘View All My Department Tasks’ permission has been assigned



- Control delegation view from the ‘Delegation Type’ drop down, selecting from:
    - All Tasks – show all tasks assigned and delegated to you
    - My Assigned Workflow Tasks – show only tasks directly assigned to you
    - My Delegated Workflow Tasks – show only tasks delegated to you



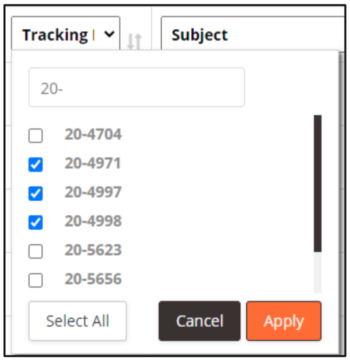
- Select to view only tasks with a deadline using the ‘Only show task with a deadline’ option (Coming Soon)
    - Tasks that contain deadlines will be shown
    - Deadlines that are in the past will be highlighted



- And expand all groups quickly and easily with the 'Expand all groups' option
- Access to all completed workflows remains on the upper right hand side

Filter Columns
Each column can now be filtered to search through the contents of the column and show only the relevant results for you

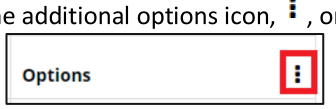
1. Select the required column heading
2. Type text in the search area to filter
3. Select the required entries in the filtered list that appears
4. Select 'Apply' to view only these entries in your workflow task list



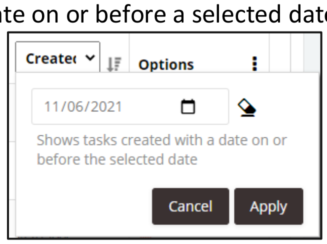
Customize Task List View

Columns that are shown can be adjusted and reordered to show the information that matters to you. When the workflow task page first loads, each workflow set will load with the default configured columns from the related workflow configuration. Each user can adjust the columns that are displayed for them:

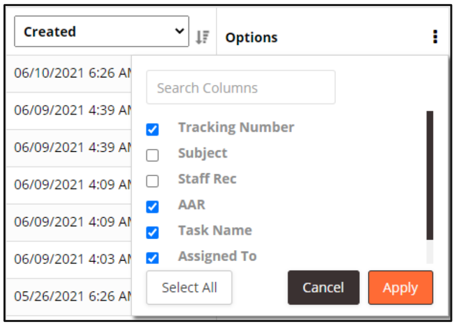
1. Select the additional options icon, ⋮ , on the right-hand side of the workflow task table



2. Columns available for this workflow type will appear for selection. You will be able to select from:
   - All workflow variables that have been added as a column in the 'List Columns' area of the workflow definition
     - Note: Contents in these columns are displayed in the format they are stored in, which in some instances is an ID. Ensure you have the correct variable reference and type available for display purposes
   - Task Name – relates to the name the task step is given in the workflow definition, for example 'Peer Review, 'Originator Review'
   - Assigned To – the current owner of the task
   - Date Created – the date and time the task was created, with support to filter all tasks created with a date on or before a selected date



3. Select the columns you wish to see and select 'Apply'



4. The table view will update with your required columns selected for this workflow
5. Your selected view will be retained when you return to your workflow task list
   - Note: Preferences are stored locally in the browser. Using a different browser, a different machine or clearing your browser cache will set the view back to the default view
6. To reorder the columns that are currently displayed:
   - Using your mouse, select a column header and hold to drag to the desired location
   - Release the mouse to drop the selected column

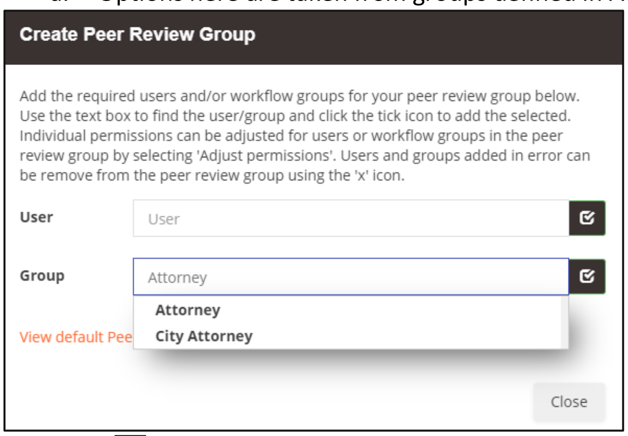
Peer Review Updates

In addition to the ability to adjust permissions for individual users in the peer review creation, discussed earlier in this document, we also updated the peer review group set up UI and added the ability to reference groups in peer review group creation

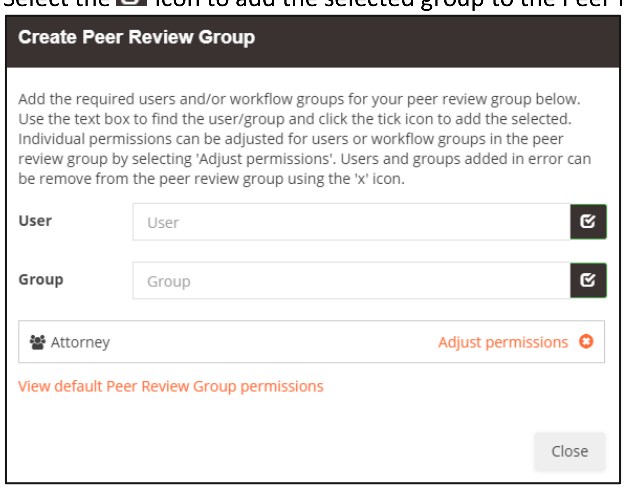
Assign to a Group In Peer Review
We have added access to pre-configured groups in Peer Review Group set up, allowing you to add multiple people into a peer review group in one action.

The result of adding a group here is the equivalent of adding each user in the group to the peer review group - each user in the group will be assigned an individual peer review task. This means you can quickly and easily add multiple users, saving you time, as well as providing the ability to assign peer review more generally, without needing to know each user individually.

1. When creating the Peer Review Group, type the group name in the ‘Group’ area. The list of available options will filter as you type.
    a. Options here are taken from groups defined in Admin -> Workflow -> Groups



2. Select the icon to add the selected group to the Peer Review Group



3. Select ‘Adjust Permissions’ to adjust the individual permissions for users in this group – as described earlier in this document
    a. Each user of the group will be assigned the same permissions in their individual tasks
4. Users and Groups can be used within a single Peer Review Group
5. When the task is routed to Peer Review – each user in the group, as well as any other users added individually, will receive an individual peer review task