

Workflow

Workflow Overview

Workflow is a component of Mailbox that facilitates the tracking of content that has been sent for review through the approval process. Workflow is specific to the currently logged in user — content that the user has submitted to another user, or received from another user, is shown in this list view. Additionally, content that was once in workflow for the user, but had an action performed, such as the content was approved and published, declined, or canceled, is also shown in this view.

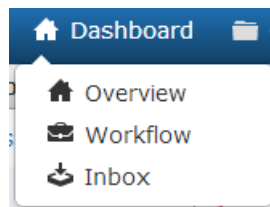
When access settings have been configured by an administrator, it may be required for a user to use the Submit button to send content to an approver in order for the content to be published. When this is the case, the Publish button is replaced by the Submit button. A message can be composed to accompany the content that is sent. Both a link to the content and a status icon that links to the message are shown in the Workflow list view.

General messages sent to the user's account are separated from Workflow files and are available in the Inbox.

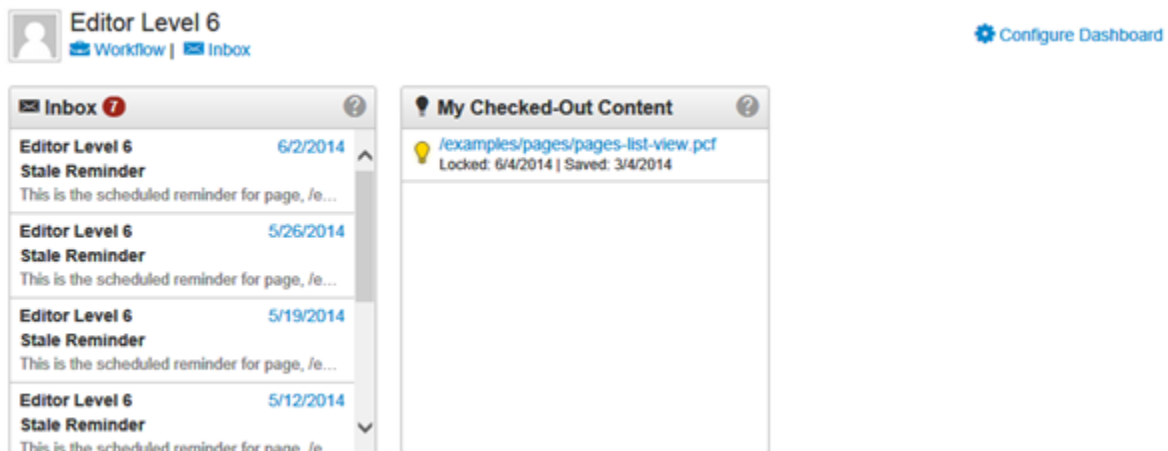
Level 9 and Level 10 administrators may view the Pending Approvals report to view all content in workflow.

Workflow can be found from the Dashboard, either by clicking the Workflow link on the Dashboard screen, or by clicking Workflow in the drop-down Dashboard menu.

Dashboard Menu



Dashboard

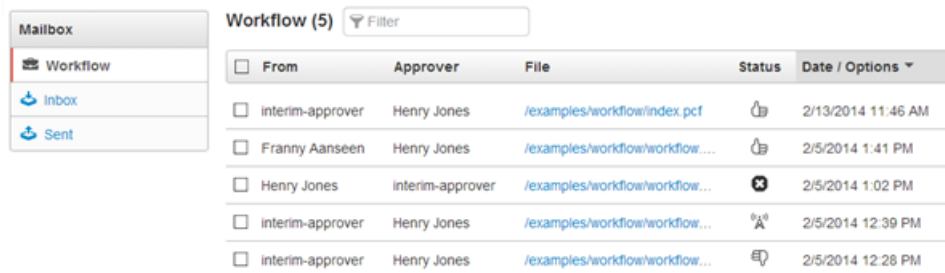


Workflow Screen

The Workflow screen includes the following features and functionality:

- Shows the number of items in the Workflow
- Includes the ability to filter based on the user who sent the content or the approver
- Can use multi-select in order to delete multiple workflow messages with the same action
- Can use the selection checkboxes to select a message to view or delete
- The list can be sorted by From, Approver, File, Status, or Date
- Click the linked file name to view the Preview of the content
- Shows the status
- Shows the date and time that the content was sent for approval

Example of the Workflow Screen







Mailbox		Workflow (5) <input type="text" value="Filter"/>				
<input type="checkbox"/>	From	Approver	File	Status	Date / Options	
<input type="checkbox"/>	interim-approver	Henry Jones	/examples/workflow/index.pcf		2/13/2014 11:46 AM	
<input type="checkbox"/>	Franny Aansen	Henry Jones	/examples/workflow/workflow...		2/5/2014 1:41 PM	
<input type="checkbox"/>	Henry Jones	interim-approver	/examples/workflow/workflow...		2/5/2014 1:02 PM	
<input type="checkbox"/>	interim-approver	Henry Jones	/examples/workflow/workflow...		2/5/2014 12:39 PM	
<input type="checkbox"/>	interim-approver	Henry Jones	/examples/workflow/workflow...		2/5/2014 12:28 PM	


File

The approver can click the linked file name to preview the content. Content that is sent to an approver is automatically checked out to that user and the user can perform various page or file actions on the content, including decline and revert. For example if the content is an image, the Image Editor is automatically previewed. If the content is a page, the preview of the page is shown. Please note that Level 0 Reviewers cannot edit files.

Status

A status icon is shown in the Status column for each content item. Content listed in Workflow can be previewed by any user, but only the user to whom the content was sent has the file checked out and can perform other actions upon it. Clicking a status icons shows the Workflow Message.

Status Icon	Description
	Pending Approval (by another user)
	Pending Approval (by the current user)
	Approved and Published
	Declined

Status Icon	Description
	Cancelled from Workflow

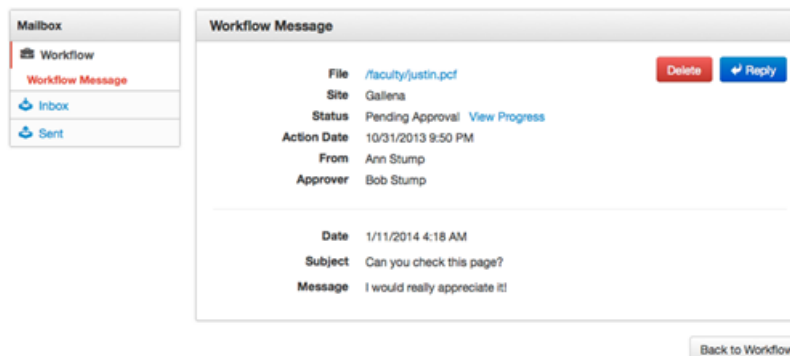
View

When content is sent for approval, the sender can attach a message. This is associated with the item in Workflow as a Workflow Message. This can be viewed by performing one of the following actions:

- Hovering over the file row and clicking on the View option
- Clicking the Status icon
- Selecting the checkbox next to the item and clicking View

From within the message, the following features and functionality are available:

- Clicking the linked file to preview the content sent for approval
- Viewing the workflow details, including the site from which the content originated, the status, the date of the latest action indicated by status (e.g., if the content has only been sent for approval but not approved, this shows the sent date, once published this shows the publish date), and who sent the content and the approver. This also shows the messages details: I.e., the date and time the message was sent, the subject, and the message (if any).
- Deleting the message
- Replying to the message
- Navigate back to Workflow



Reply

A message in Workflow can be replied to by clicking the Reply button in the message. The Reply dialog is shown. Additional users or groups can be added to the message, the subject can be changed, and a message can be added. Optionally, a copy of the message can be sent by email in addition to the internal OU Campus message.

Reply

To:

Subject:

Message:

Send a copy by email
Send external email in addition to internal OU Campus message

Click Send to send the message to the selected users or groups and the user will be returned to the original Workflow message. Clicking Cancel returns the user to the original Workflow message. The message is sent to each user's inbox.

Delete

The workflow item can be deleted with one of the following actions:

- Hovering over the file row and clicking Delete
- Clicking the Status icon and from the Workflow Message view, clicking Delete