

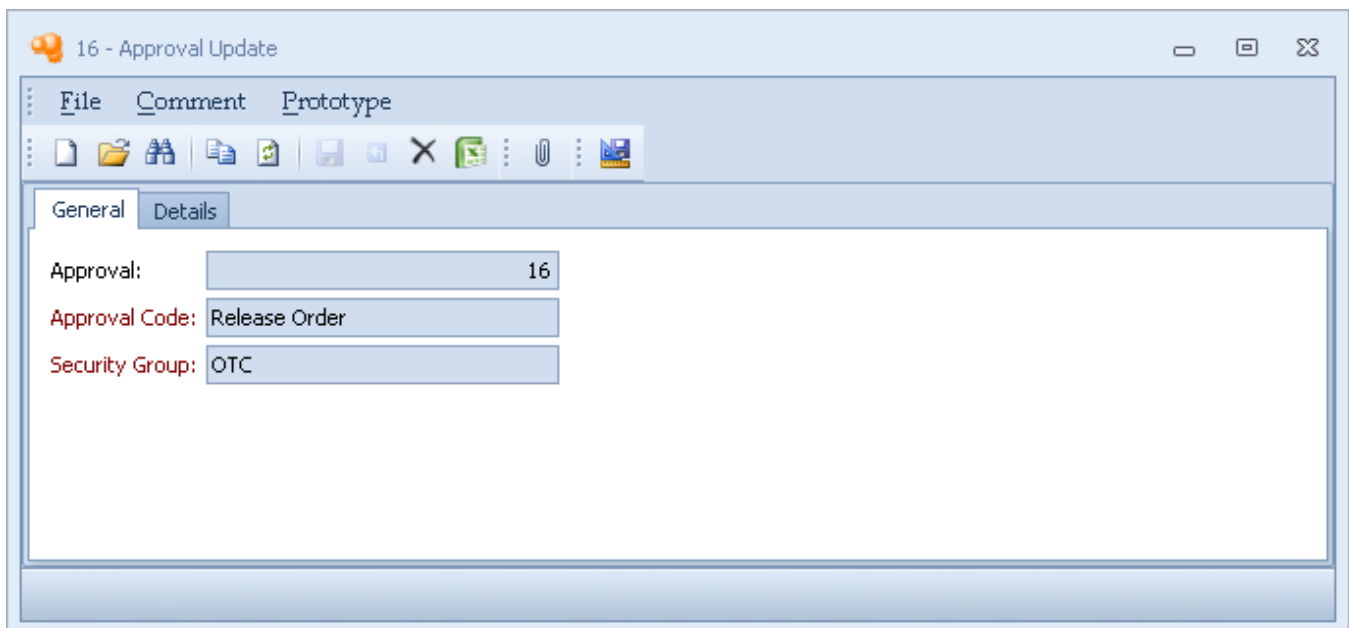
## WORKFLOW CREATION

A workflow is used to enforce a set of required approvals before certain actions can be completed in Mar-Kov.

To implement the Workflow feature, an approval code detailing the approvals required must first be created.

### Approval Update

The *Approval Update* program is accessed from the main menu, by clicking *Administration >> Approval Update*.

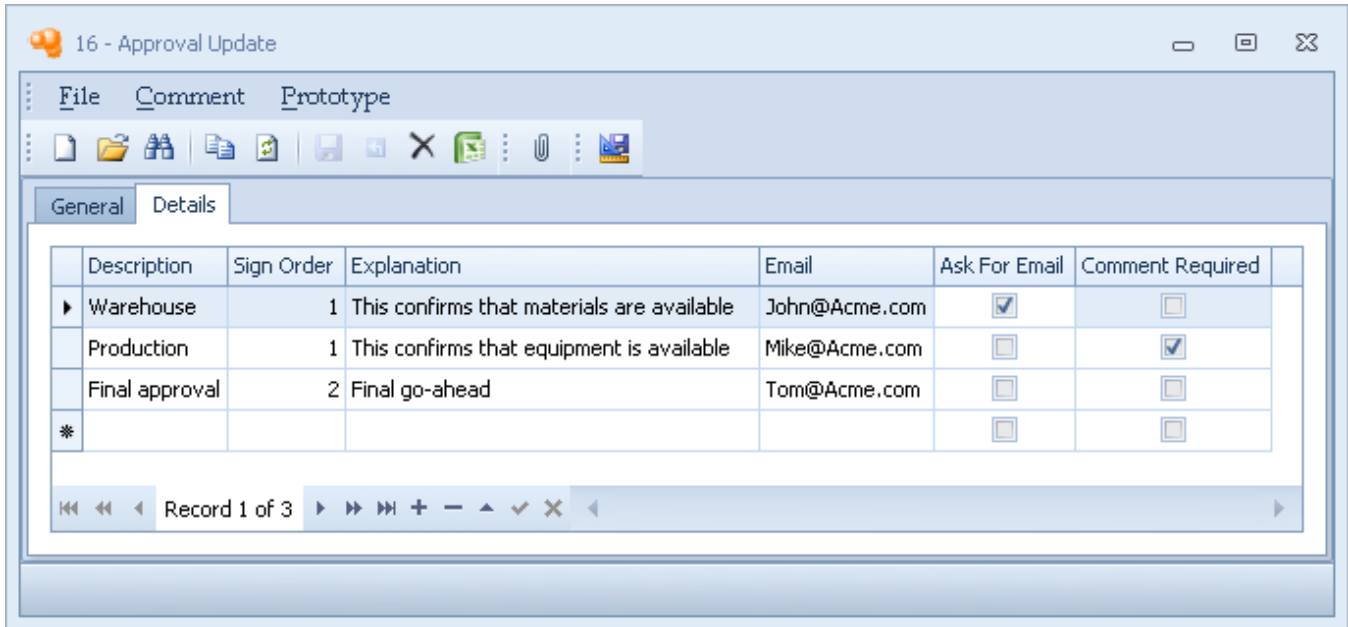


*Approvals* are used when you require users to confirm that an action may be taken; there are five possible *Approval Codes*:

Approval Code	Require approval before you can
Release Order	Release a Batching or Packaging order
Mark Order Complete	Mark a Batching or Packaging order complete
Close Order	Close a Batching or Packaging order
Publish Recipe	Publish a Batching or Packaging recipe
Publish Order Edit	Publish a Batching Order Edit

The *Security Group* allows you to select which type of order or recipe the *Approval* applies to; for instance, you may require orders that use controlled substances to have more stringent approval procedures.

### Approval Details




Each detail line specifies a separate signature that must be entered before CMS will allow you to perform the action being approved.

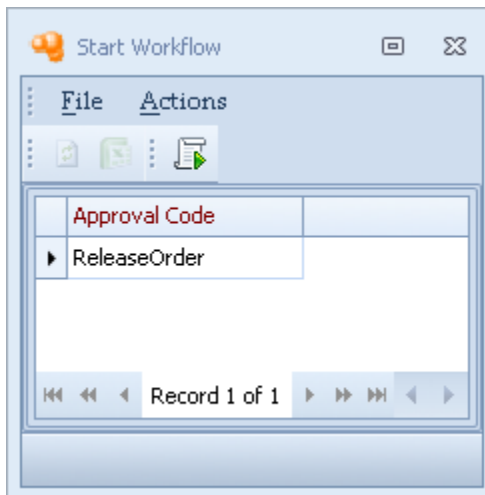
Field	Description
Description	A brief description
Sign Order	This allows you to specify a hierarchy of signatures. If this is blank, then the signature may be entered at any point. If this is numeric then all signatures with the lowest value must be entered before those with higher values. In the example above the Warehouse and Production Signatures must both be provided before the Final Approval is entered.
Explanation	A multi-line explanation of what the signature is for.
Email	One or more email addresses separated by colons (;). If this is blank, then email addresses must be provided when each workflow is started.
Ask For Email	If checked then email addresses will be requested when each workflow is started.
Comment Required	If checked then a comment will be required when signing this item.

A workflow can now be enacted.


## Workflow processing

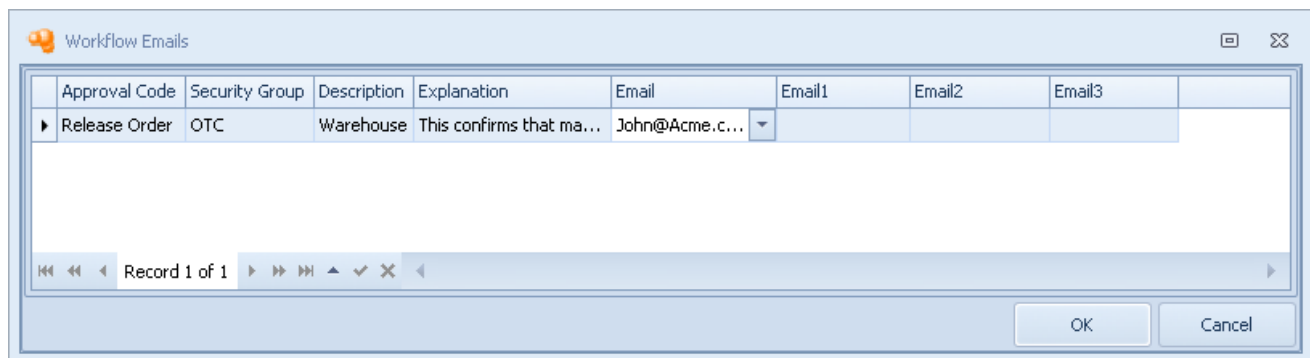
### Start Workflow

To start a workflow click on the *Start Workflow* button () , the *Start Workflow* form appears:




If there are multiple *Approval Codes* shown, then select the one you want to start.

Click on the *Start Workflow* button () , if any *Approval Details* do not have *Email* specified or have *Ask For Email* checked then you are required to enter emails for each of those details:



*Email* shows the address from the *Approval Detail*; each of the four email field may be edited – only email addresses from the *User Update* for users allowed to sign for this item may be selected. When you click *OK* on the *Workflow Emails* form, or if it was not displayed then the *Workflow* is created and a *Workflow Started* notification is sent for all *Approval Details* with a blank *Sign Order* or with the lowest *Sign Order*.

## Workflow Status

To view the status of a workflow click on the *Workflow Status* button () , the *Workflow Status* form appears:

The screenshot shows a window titled "7 - Workflow Status". It contains two main sections:

**Workflow Status Table:**


Workflow	Approval Code	Security Group	Order	Status	Cancelled By	Cancellation Reason
7	Release Order	OTC	3018	InProgress		
6	Release Order	OTC	3018	Rejected		
5	Release Order	OTC	3018	Cancelled	Richard	Materials not ready

**Approval List Table:**

Description	Explanation	Sign Order	Signature	Comment	Sign Date	Rejected	Log	Comment Required
Warehouse	This confirms that materials are available	1	Richard	Materials are ready...	7/20/2015 2:22 PM	<input type="checkbox"/>	26429	<input type="checkbox"/>
Production	This confirms that equipment is available	1				<input type="checkbox"/>		<input checked="" type="checkbox"/>
Final approval	Final go-ahead	2				<input type="checkbox"/>		<input type="checkbox"/>

The upper grid shows the current workflow status; in the example above the work flow was started and cancelled then started and rejected and has now been started for a third time. The lower grid shows the status of each workflow detail; in the example above the first detail has been signed.

## Sign Workflow

To sign for a workflow detail select the line in the lower grid and click the *Sign Workflow* button () , the *Sign Workflow* form appears:

The screenshot shows a dialog box titled "Sign Workflow". It contains the following fields:

- Title:** This confirms that materials are available
- User:** MAR-KOV\
- Password:** (empty field)
- Reason:** (empty text area)
- Buttons:** OK

You are only allowed to sign for details that are allowed by your *Role*.

Enter your *User* and *Password*. The *User* must be that one that you used to log into your current Windows session. The *Reason* is required if the detail has *Comment Required* checked.

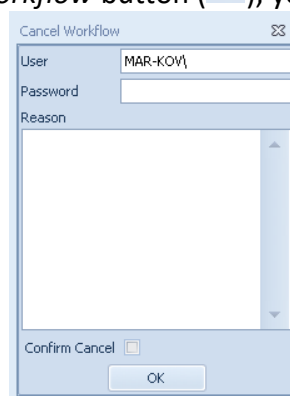
Click *OK* to save the signature.

If the detail being signed has a *Sign Order* and there are now no other details with the same *Sign Order* then a *Workflow Started* notification is sent for all *Approval Details* with the next highest *Sign Order*.

If there are now no other unsigned details then a *Workflow Completed* notification is sent.

### Cancel Workflow


To cancel a workflow click on the *Cancel Workflow* button (  ), you are asked to confirm:

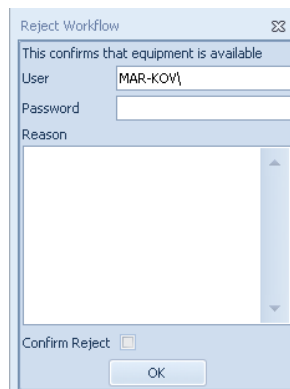


Enter your *User* and *Password*. The *Reason* is required and you must check the *Confirm Cancel* box. Click *OK* to cancel the workflow, a *Workflow Cancelled* notification is sent.

No further actions can be made to this workflow; a new workflow may be started by using the *Start Workflow* button.

### Reject Workflow

To reject a workflow, select an unsigned detail and click on the *Reject Workflow* button (  ), the *Reject Workflow* form appears:



Enter your *User* and *Password*. The *Reason* is required and you must check the *Confirm Reject* box.

Click *OK* to reject the detail, a *Workflow Rejected* notification is sent.  
No further actions can be made to this workflow; a new workflow may be started by using the *Start Workflow* button.