

# etrieve™ | FLOW

## Etrieve Flow Administrator Guide

VERSION 2024.1



Etrieve Flow Administrator Guide  
VERSION 2024.1



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Flow Administrator Guide | October 2024

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# 1

## Etrieve Flow Overview

### 1.1 What is Etrieve Flow?

Etrieve Flow was built from the ground up to be a fully interactive, user-friendly product allowing institutions to automate basic and complex business processes. The intuitive design allows you to create pathways as simple or multifaceted as your specific processes dictate, reducing current Workflow bottlenecks, increasing visibility, and standardizing disparate business operations.

Building workflows using Etrieve Flow is simple and intuitive, with drag-and-drop functionality in the Workflow Designer. There are no complex computer languages to learn, and the interface is welcoming and not intimidating. The result is a graphical representation of your business processes that is easy for everyone to understand.

This guide provides an overview and instructions on how to use the Workflow designer. It will also give you an administrative understanding of Etrieve Flow.

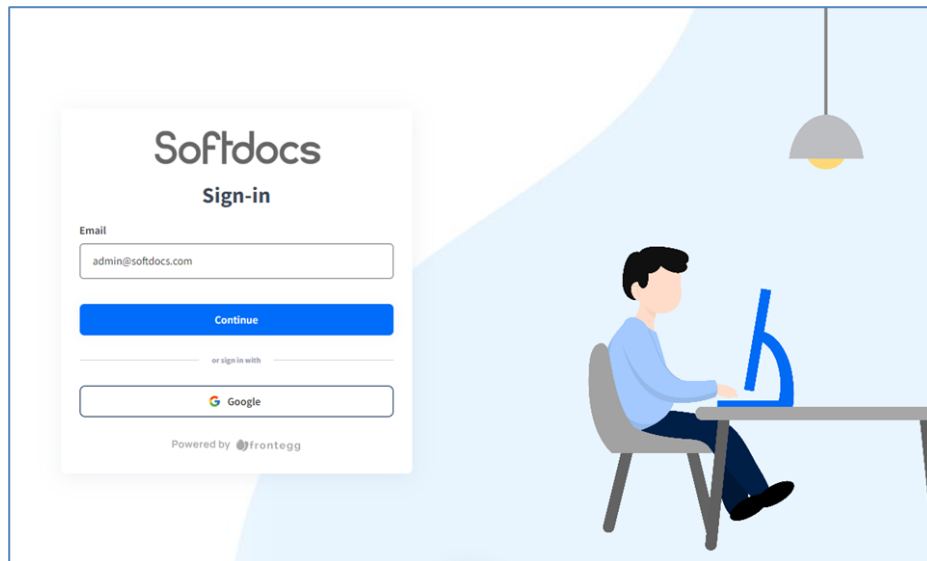
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### 1.2 Logging into Etrieve Central

Before logging into Etrieve Central, a user should open a web browser and navigate to the Etrieve Central website address. The following browsers are supported:

- ▶ Microsoft Edge Chromium
- ▶ Google Chrome
- ▶ Mozilla Firefox
- ▶ Safari (Mac/iOS)

Next, the Softdocs Identity and Access Management (IAM) platform sign in page will be presented, unless the institution elected to have users immediately redirected to their third-party single sign-on provider.



**FIGURE 1.1** Softdocs IAM Sign-In Page

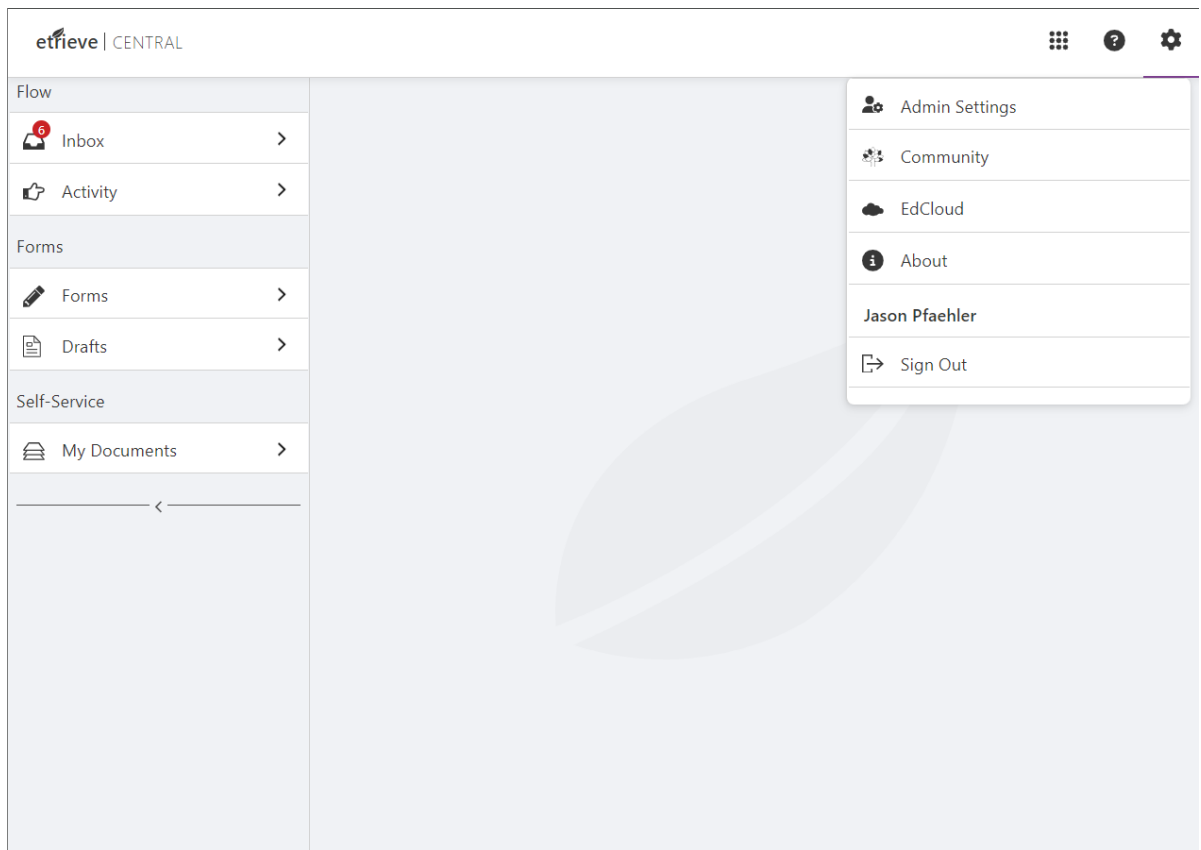
**TIP** Add the Etrieve Central website to the list of trusted websites in the domain.

Users signing in via their institution's SSO provider or with a password will enter their email on the Softdocs IAM sign-in page and click 'Continue'. The IAM platform will use the email domain to decide whether to direct users to SSO or display a password field. If enabled by the organization, users may see social platform login options. Social logins are for public users who can't access an institution's SSO and don't have an Etrieve account. Organizations can customize the IAM sign-in page with their own branding

Etrieve Central's page layout is divided into four sections:

- ▶ Header (top bar)
- ▶ Primary Navigation Panel (always displayed on the left side of the page)
- ▶ Setting Panel (display toggled on/off, right side of page)
- ▶ Document Viewer (middle & right side of page when Alternate Navigation Panel is toggled off)

What appears in these sections will vary depending on the user's security settings. For instance, the Admin Settings selection in the Settings Panel on the right will only display if the user is granted the privilege to manage Workflows or Forms.



**FIGURE 1.2** Etrieve Central Page Layout

### 1.3 Accessibility Improvements

In Etrieve Central, Forms and Flow accessibility enhancements have been enabled so that users can easily access various parts of Central via reader tools. Landmarks have been added to the right navigation panel and main viewing areas to improve the navigational experience via assistive technology and keyboard-only interaction. Users can now effectively search for and submit a form using assistive technology and keyboard-only navigation. Additional improvements include navigating the Forms and Drafts options, navigating the form, downloading, printing, commenting, attaching, and selecting submission options on the form's action bar.

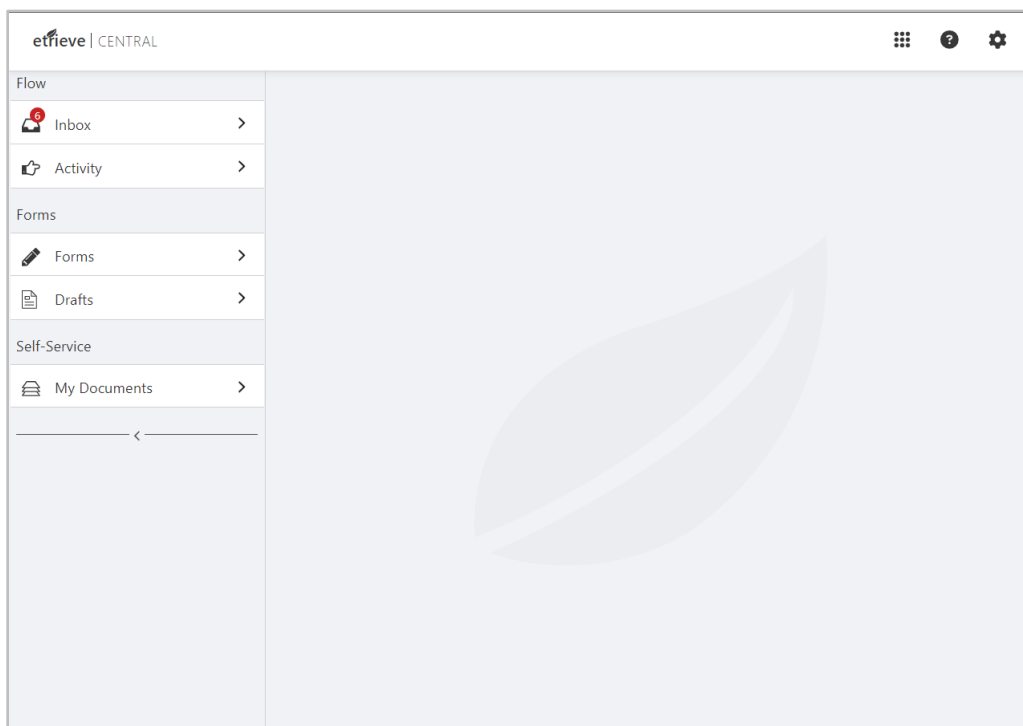
When you open the hamburger menu at the top right of the page, you will see links that can be accessed by tabbing through or via the screen reader. These links lead to forms, content, and security.

# 2

## Central Page Layout and Navigation

### 2.1 Central Page Layout

To perform any function within Etrieve, users should navigate to the appropriate section of the Primary Navigation Panel. The Panel is located on the left of the home page and consists of two sections, Flow and Forms, with sub-panels containing available Flow and Forms options. An institution may purchase and install Etrieve Reports and Etrieve Self-Service, which will also appear in the Primary Navigation Panel.



**FIGURE 2.1** Etrieve Central Home Page

The Document Viewer displays when the user works with items in one sub-panel. It will show for Inbox, Activity, Forms, Drafts, Reports, and Self-Service.

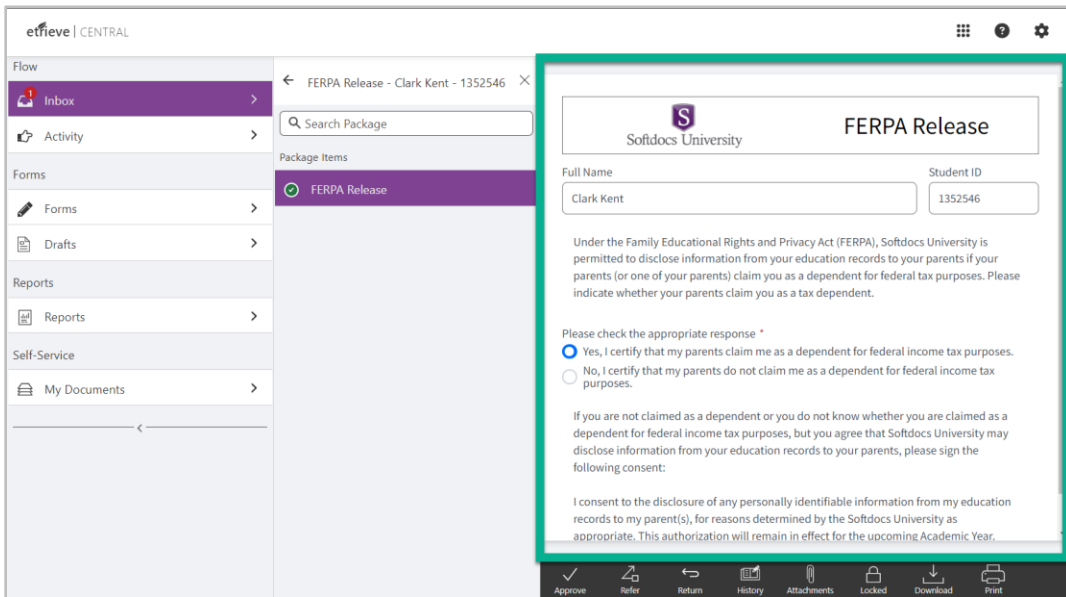


FIGURE 2.2 Etrieve Central Document Viewer

The Primary Navigation Panel may be collapsed to increase the screen space available for the Document Viewer by clicking the arrowhead (<) at the center of the line at the bottom of this Panel. Clicking it again will restore the original Panel size.

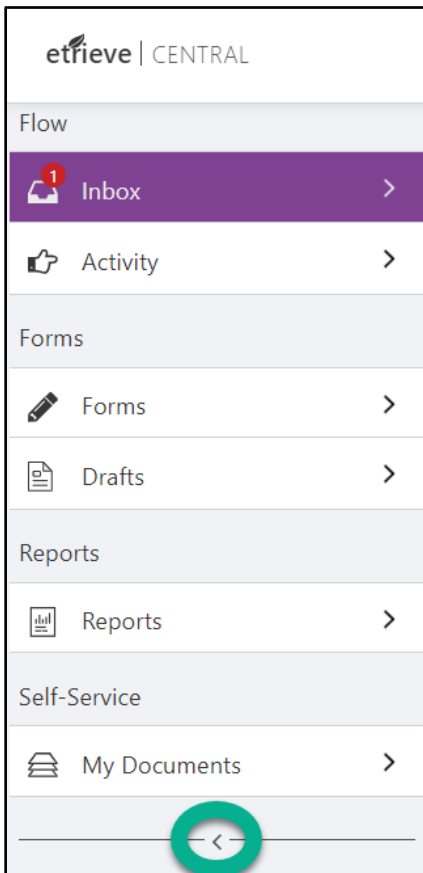


FIGURE 2.4 Collapse Primary Navigation Panel

## 2.2 The Header and Navigation

The Header is the top most bar on the Central Page. It contains these options from left to right:

- ▶ Etrieve | Central (View Reset)
- ▶ App Switcher
- ▶ Resource Center (Question Mark) – Displays based on privileges – Cloud Offering
- ▶ Settings Panel Toggle (Gear)



FIGURE 2.5 The Header

**APP SWITCHER** | Clicking this icon (nine squares) opens a three-button menu, allowing users to navigate between Central, Content, and Security, the three main Etrieve applications.

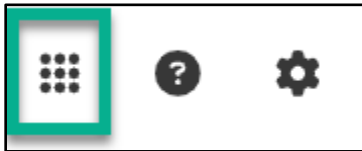


FIGURE 2.6 App Switcher

**ETRIEVE | CENTRAL** | Clicking here resets the user's view, closing any Inbox packages currently being viewed. It will return the user to the initial EtrieveCentral home page.



FIGURE 2.7 Etrieve | Central

**MENU ACCESS** | Clicking the gear menu icon on the right toggles on the Settings Panel.

The Settings Panel may be toggled off by clicking the gear.

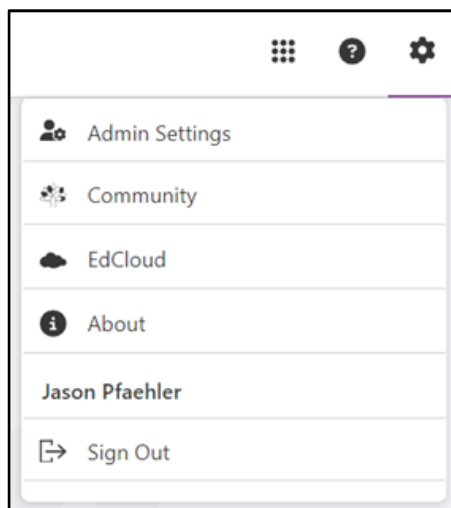


FIGURE 2.8 Etrieve | Central Settings Panel

**ADMIN SETTINGS** | The Admin Settings option will be visible to users with access to manage and configure Etrieve Workflows and Forms.

**COMMUNITY** | Community provides a link to access Softdocs' Community Login page.

[EdCloud/GovCentral](#) | EdCloud/GovCentral provides a link to access EdCloud/GovCentral pages if licensed. (Cloud Offering)

[ABOUT](#) | About provides details on the version of Etrieve Central that the user is accessing and copyright and licensing information.

[SIGN OUT](#) | Signs out the currently logged-in user. After the application has been idle for the configured amount of time, the user will be redirected to the sign-out page. Select the 'Sign In' button to return to the Softdocs IAM sign-in page.

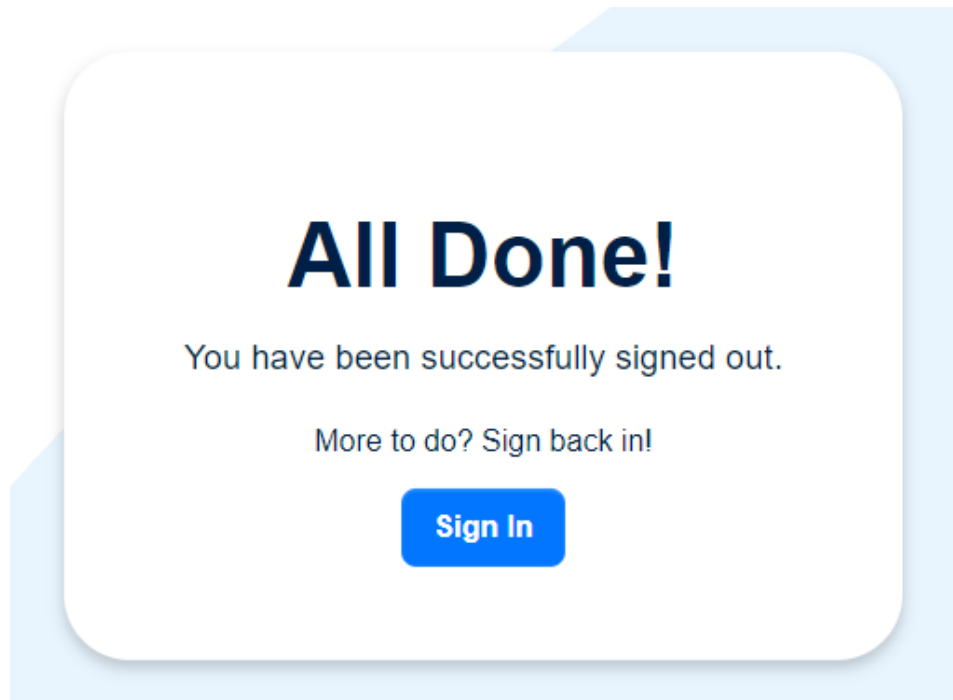


FIGURE 2.9 Sign-Out Page

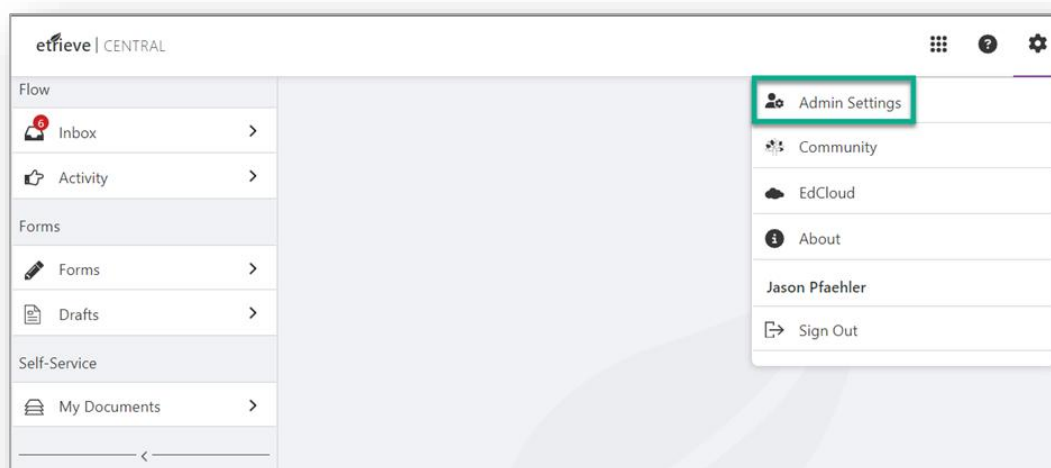


# 3

## Etrieve Flow Configuration

### 3.1 Configuration Menu

The Settings Cog/Menu provides Etrieve Central Administrators access to the Flow, Forms, and Form Groups Settings.



**FIGURE 3.1** Etrieve Central Alternate Navigation Panel | Settings

Access to the Settings Cog is a user-based privilege established within Etrieve Security. Click on the Settings Cog to access Flow Configuration and the Settings icons.

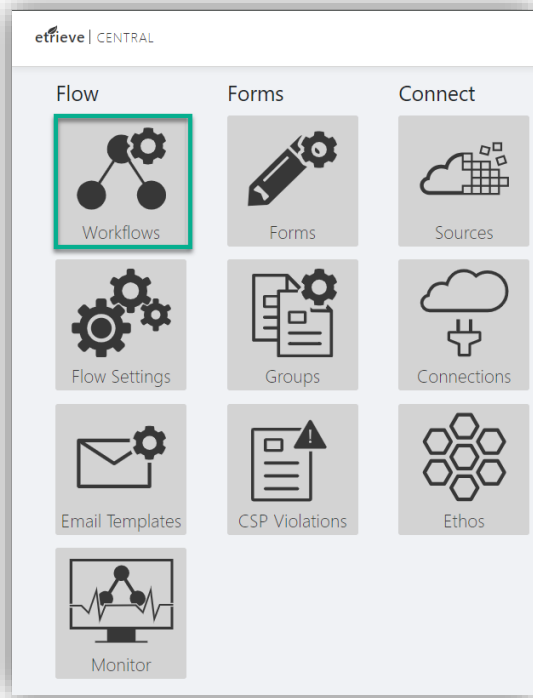


FIGURE 3.2 Etrieve Flow | Workflows

From the Flow Settings page, users can access a separate User Interface that triggers the reprocessing of all failed items into Flow. Under the Submission Errors field, only content documents that failed to process will be counted.

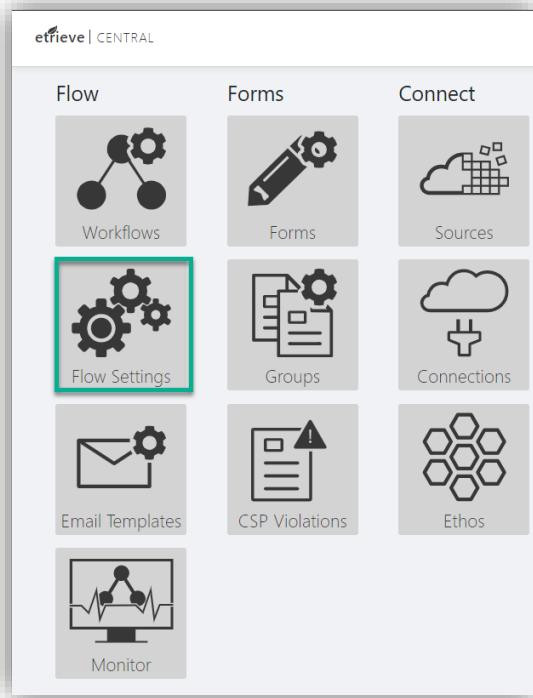


FIGURE 3.3 Etrieve Flow | Settings

< Workflow Settings

☐ Export attachments as separated files for Workflows

☒ Default the "Enable Uploading Attachments" setting on new workflow steps to be true.

Notification Email:  [UPDATE EMAIL](#)

Submission Errors: **REPROCESS**

(Items waiting to be processed: 30936)

FIGURE 3.4 Etrieve Flow | Settings | User Interface for Re-Processing Errors

- Configurations:
  - Export Attachments as separated files for Workflows
  - Default the "Enable Uploading Attachments" setting on new workflow steps to be true
  - Notification Email for failed workflow processes/error message notifications.

## 3.2 Workflows Main Menu Options

The menu options for Etrieve Workflows consists of four options:

- 1 Add a new Workflow
- 2 Edit an existing Workflow
- 3 Delete an existing Workflow
- 4 Search for an existing Workflow

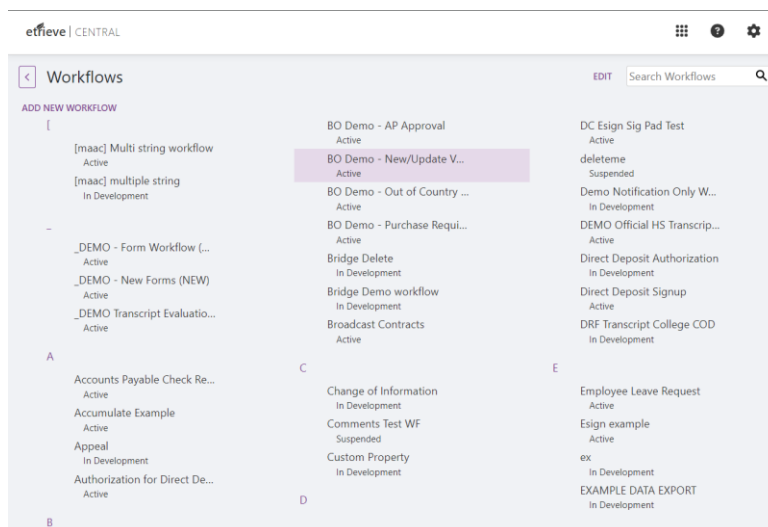


FIGURE 3.5 Workflow List

To add a new Workflow, select the Add New Workflow option. The Workflow Settings page will then be displayed, and the next chapter will explain it in further detail.



FIGURE 3.6 Add New Workflow

FIGURE 3.7 Workflow Configuration | General Settings Tab

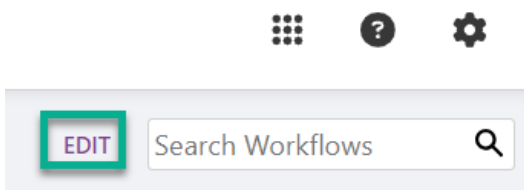


FIGURE 3.8 EDIT Option

To delete an existing Workflow, click on the 'EDIT' option, and the user will see the 'DELETE' and 'CANCEL' options. Checkboxes will display next to the name of each Workflow on the list. Click the checkbox(es) beside the desired Workflow(s), then click the word 'DELETE'. A Confirmation Panel will be displayed, and the Administrator may click CONFIRM or CANCEL. Cancel will take the user back to the Workflow List.

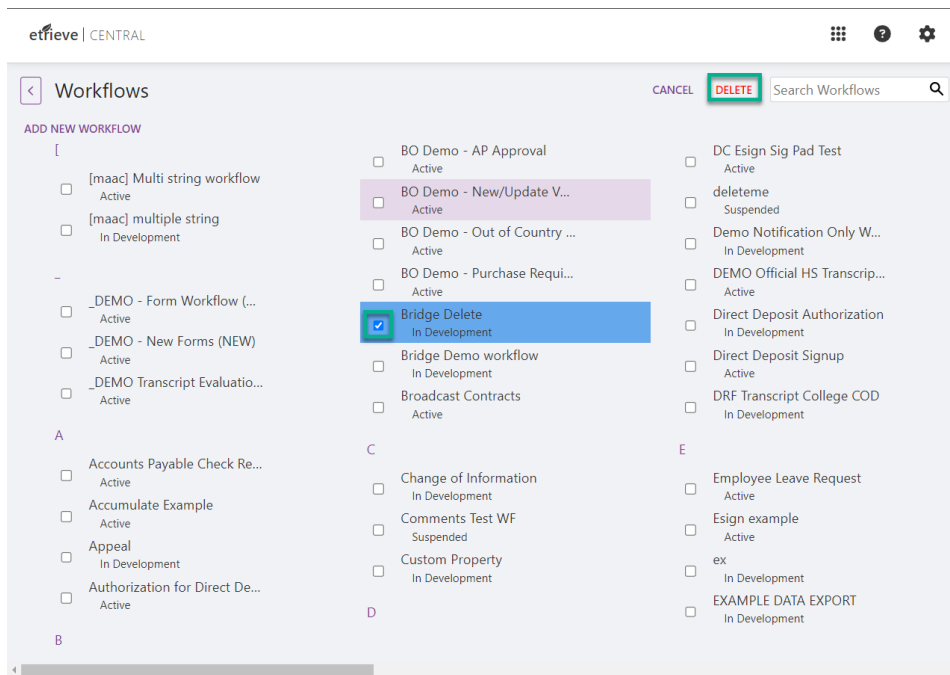


FIGURE 3.9 DELETE Option

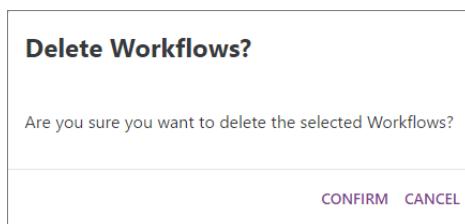


FIGURE 3.10 Delete Workflows Message

If a Workflow is selected for deletion and has packages that are in Progress, the user will be unable to delete it. A message is returned notifying the user of the failure to delete. The message states, “Workflow has in-progress instances and cannot be deleted.”

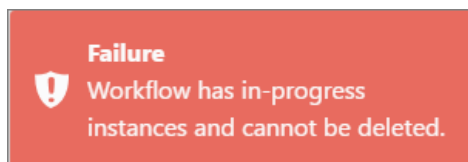


FIGURE 3.11 Failure Workflow Message

Use Search to locate a specific Workflow (s) or to filter the list. Start typing in the Search field, and Etrieve Central will start narrowing the options based on what you enter.

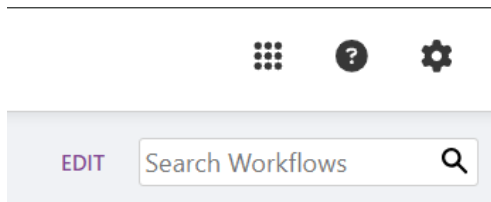


FIGURE 3.12 Search Option for Existing Workflow

# 4

## Etrieve Flow Designer

### 4.1 Basics of Workflow Configuration

Creating a Workflow may be thought of as three primary tasks: Creating the Workflow, Assigning the Document Type (s) or Forms to be processed, and Designing the Workflow path. Workflows can be categorized into two different types:

- 1 **SIMPLE WORKFLOW** | A Workflow with a direct actor-to-actor route without considering any data on the form or document. An example of a simple Workflow is Financial Aid or Registrar forms. The actor (person) initiates a form is automatically routed to the appropriate department (FA or Registrar). The request will appear in the group's Inbox for approval or declination.
- 2 **ADVANCED WORKFLOW** | The data present on the document/form, or even the type of document/form, may require the creation of an advanced Workflow. An example of a more complex Workflow could be one created to handle various admissions applications. The Workflow begins with two sets of navigation rules that evaluate the various types of applications received in Admissions. If an application is First Year Graduate, Concurrent, or Unclassified, the Key Field of Application Status is updated to Admissions Counselor Review, and then it routes to a Conditional Actor, which identifies the Admissions Counselor who handles each of those types of applications and delivers to that Counselor's Central Inbox. Then, these types of applications are routed to a standard approval process for most applications. Since these types of applications do not require a transcript evaluation, their approval process is simpler.

If the application is Accelerated Track/Nursing Transfer, RN-BSN, Returning, Transfer, or Visiting, the Key Field for Application Status is updated to Transcript Evaluation, and all of these applications are delivered to the Transcript Evaluator Group. After the Transcript Evaluation is completed, the Returning, Transfer, and Visiting applications get their Application Status Key Field updated to Admissions Counselor Review, and they now join the Workflow for the First Year, Graduate, etc., types of applications.

However, the Nursing application types get their Application Status Key Field updated to Nursing Application Preparation and are routed through a standard approval process in the College of Nursing.

---

### 4.2 Workflow Configuration Using Actors, Activities, and Navigation Rules

Three key elements are used in Workflow Design: Actors, Activities, and Navigation Rules.

The Actors displayed within the Actors Section provide a method of configuring the needed step to a person or group in the Workflow. These Actors are dragged and dropped onto the Designer's workspace.

### 4.3 Actors Defined

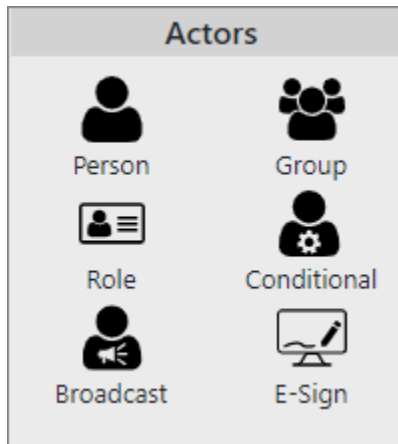


FIGURE 4.1 Flow Actors

**NOTE:** Conditional Actors require the use of the Etrieve Integrations module. If that module was not purchased, although a Conditional Actor may be dropped on the Designer Workspace, it will not be configurable, and the Workflow will display a red exclamation mark on the menu to alert the Administrator of the error condition.

Forms used in an E-Sign workflow can have sources associated with them. If the source is anonymous, it will execute during the E-Sign step. If it is not anonymous, it will not execute during the E-Sign step.

**PERSON** | A single user will be chosen in the configuration; only that user will receive the package.

**GROUP** | All users of the chosen group will receive the package.

**ROLE** | All users assigned to the selected role will receive the package (this Actor is not commonly used).

**CONDITIONAL** | A single user or user group will receive the package. The user or user group to receive the package is “conditional” based on form values and integration (the recipient can differ from package to package).

**BROADCAST ACTOR** | A broadcast actor typically allows the representation of steps so broadcast routing can occur at the first step of a Workflow. Broadcast routing can be incorporated into a business flow, which enables the Broadcast & Preview actions for the originator & the Approve & Denials for the recipients of the broadcasted form. Senders of broadcast forms commonly use this feature to manage Contracts and Policy Changes. Leveraging the Broadcast Actor with forms are commonly used to manage Contracts. This will result in fewer users to filter from, fewer irrelevant filters to manage, and the pre-population of automatically available data.

This actor provides the ability to configure the following:

- ▶ Send a form to multiple users.
- ▶ Determine recipients for Broadcast Routing.
- ▶ Apply filters to narrow a list of recipients.
- ▶ Pre-population of the broadcasted forms with recipient-specific data from an integration source configured on the Broadcast Actor step.
- ▶ Preview form instances with pre-populated data before sending.
- ▶ Search for a form instance sent to a specific user in the Activity to view its Workflow status.

**E-SIGN** | An E-Sign actor step allows the form to be routed to a Signer Recipient outside the institution who must sign documents. For example, an institution user (Financial Aid Administrator or Student) has a form (Dependent Verification Worksheet/Form) that needs to be sent to the non-institutional user (a Parent) using the Parent’s email address. This allows the Parent to receive the form and provide approval of intent and consent to sign and do business electronically without having an internal account. If configured, the Parent will receive the link to the signed document via email after completion.

The E-Sign step has two navigation hubs: Submit (Approve) and Deny. It will route using these hubs just like other Actors do today.



When configuring an E-Sign actor on a workflow, the Administrator must provide fields from the form that contain the Signer Recipient's email address, the fields that need to be completed/signed, and which email template will be used to send to the Signer Recipient the form which needs their signature.

**NOTE:** Only designated fields provided in the “Signature Field” will be editable on the form for the Signer Recipient. Only Forms can be used with E-Sign.

FIGURE 4.2 E-Sign Actor Configure Menu

When more than one form is used for the workflow, the E-Sign step will indicate which designated fields are common across the associated forms and which are in use as part of the “Signer Email Address” and “Signature Fields” dropdowns. It will also warn when an uncommon field is selected on the E-Sign Step. All signature and email fields will be cleared if the associated form is removed. The selection of fields in the “Signer Email Address” and “Signature Fields” are dynamic because they will not allow an already used field to be chosen.

FIGURE 4.3 E-Sign Step indicating ‘In Use’ field

FIGURE 4.4 E-Sign Step indicating ‘Common’ field

The E-Sign actor allows optional email templates to be selected, which will be sent to the Signer Recipient based on the actions they select on the form.

- ▶ **Final Copy Template**—This template sends an email with a link to the signed form and provides final instructions to the Signer Recipient after they sign the form.
- ▶ **Decline Template**—This template sends an email to the Signer Recipient after they decline signing, letting them know the package was declined and providing information about what the decline entails.
- ▶ **Opt Out Template**—This template sends an email to the Signer Recipient after he/she opts out of signing, letting them know the package was opted out and providing information about what opting out entails.

More information about email templates can be found in [section 5](#) of this document.

**ENFORCE PACKAGE REVIEW** | Administrator users can enforce package review using the required fields on any decision actor. This option can be configured on any actor step in the workflow designer, including a person, group, role, broadcast, or conditional actor. This option will ensure that required fields are completed by the appropriate person at the appropriate step in the workflow. This setting will default to true for any newly added Actor step.

**ENABLE REFER** | Administrator users have the option to allow or deny users the ability to refer a package at a specific actor step in a workflow. This option can be configured on any actor step in the workflow designer, including a person, group, role, broadcast, or conditional actor. This setting will default to Enabled for any newly added Actor step.

**ENABLE RETURN TO PREVIOUS** | Administrator users have the option to allow or deny users the ability to return a package to a previous step in a workflow. This option can be configured on any actor step in the workflow designer, including a person, group, role, broadcast, or conditional actor. This setting will default to Enabled for any newly added Actor step.

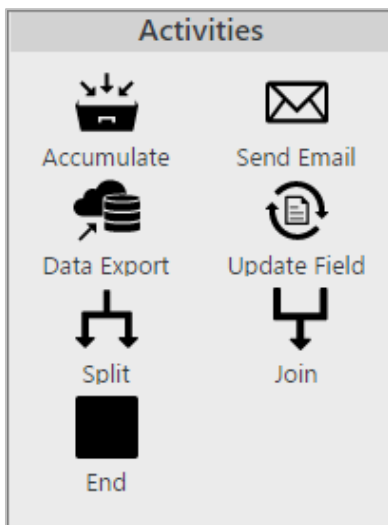
**ENABLE UPLOADING ATTACHMENTS** | Administrator users have the option to allow or deny users the ability to upload new attachments to the package item. This option can be configured on any actor step in the workflow designer, including a person, group, role, broadcast, or conditional actor.

**ACTOR NOT FOUND** | When a user, group, or role is deleted from Security but was assigned to a step in the workflow, an exclamation indicator appears on the Designer tab and the Actor step. The Actor Step will also display 'Actor not found' on the tooltip and within the Step configuration.

FIGURE 4.5 'Actor Not Found' Warning

## 4.4 Activities Defined

Activities are actions that may be taken on the Document/Form Packages processed in the Workflow. As with Actors, they are dragged and dropped onto the Designer Workspace.



**FIGURE 4.6** Flow Activities

**ACCUMULATE** | This activity is used to “accumulate” multiple items to be combined and routed as a single package once the accumulation parameters are satisfied. This activity is often used for the onboarding process. Example: An Accumulation Activity will be configured to accumulate the originator W-4, Personnel Action Form, Direct Deposit Form, etc., based on the Employee ID, effectively making these forms route as one package to avoid receiving multiple forms in separate packages (all forms are then routed together). Once all forms are accumulated, the new form package will be routed to the next actor/activity containing all completed onboarding forms.

**SEND EMAIL** | This activity will email a single email address. The email template and recipient’s email addresses will need to be configured. For multiple recipients, add multiple “Send Email” activities.

**DATA EXPORT** | This activity can be used to export data from a form to an integrated table. This process is often used for reporting. The table integration will need to be configured, and the desired form inputs will have to be marked as “key fields” in the Forms Settings for the data-export activity to write the form input values to the designated table. Each new form that passes through this activity in a Workflow will write a new row to this table – all key field values will be exported to the table as columns in that form’s row. The IDs of the key fields will need to match the table’s column names.

**NOTE** | If an export is configured to an End Step, the system will automatically create a folder if one does not already exist. This will avoid the need for administrators to create a folder manually.

**NOTE** | Web Sources with an Action Type of “Edit” can be used for Data Exports and can be selected from the Integration Mapping drop-down.

**UPDATE FIELD** | Used in routing a Content document, which updates a specified field value. Unused in the routing of forms.

**SPLIT** | This activity duplicates the package, allowing it to be routed to multiple actors/activities simultaneously.

**NOTE** | This activity is not intended for collaborative editing.

**JOIN** | This activity combines packages previously split into one package. For routing to execute successfully, the number of split packages must equal the number of packages being routed into the join.

**END** | Ends the Workflow activity and can be configured to export the package and a key field document. The Document Type name field is required when configuring an end step; without a name, the workflow cannot be saved.

**NOTE** | An error message will display whenever a form or document type assigned to the current workflow is removed or missing. This can occur for any of the above activities.

## 4.5 Connectors Defined

Connectors are the lines between Actors and Activities that determine the order and direction of the Workflow. Connectors are created by dragging and dropping from one Actor/Activity to another. Multiple Connectors can originate from the same Actor/Activity. Navigation Rules determine the Connector the package uses when multiple Connectors are used.

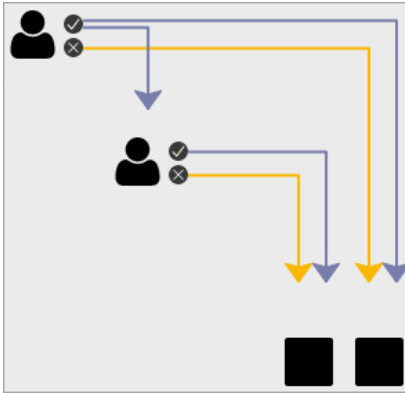


FIGURE 4.7 Connectors

**APPROVE/SUBMIT CONNECTOR** | To create a Connector between two Actors/Activities when a package is Submitted or Approved, click and drag from the ✓ icon to the desired Actor/Activity.

**NOTE** | Referral recipients only have the option to Approve a package.

**DECLINE CONNECTOR** | To create a Connector between two Actors/Activities when a package is Declined, click and drag from the ✕ icon to the desired Actor/Activity.

**NAVIGATION RULE** | Navigation Rules are used to select a Connector based on the configured criteria. Navigation Rules can be set up based on Key Fields or Actor Attributes. Navigation Rules are accessed by clicking the settings cog of a Connector. A small lever icon will indicate any Connector with a Navigation Rule.

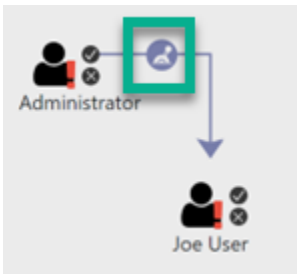


FIGURE 4.8 Navigation Rule Indicator

**ACTIVE PACKAGES SEARCH** | Administrators can search for packages at a step within workflow design.

## 4.6 Create, Assign and Configure

### 4.6.1 General Settings of Workflow

**NAME** | The Workflow is given a unique, descriptive name that can easily be distinguished.

**DESCRIPTION** | The description is a high-level description of the Workflow and its purpose.

**DEPARTMENT** | Use this field to assign the Department with administrative privileges for this Workflow. If department access has not been granted, leave Unassigned.

**EFFECTIVE DATE** | The date that the Workflow will be put into production.

**TEMPLATE STATUS** | The current state of the Workflow.

- ▶ In Development – The current Workflow Administrator is developing. (This is the default setting of a template status)
- ▶ Active – Active Workflow: all new documents will be processed, and the Workflow is not editable.
- ▶ Suspended – When the Workflow needs to be edited or is no longer in use. Any active packages that are in the workflow will continue to be routed.

**SEND NOTIFICATION FOR LATE PACKAGES** | This toggle can be used to turn on or off package notification monitoring. When toggled on, the indicated user will receive an email if a package has not been completely processed during the specified time frame.

**NOTIFICATION EMAIL ADDRESS** | The Email address that will receive the notification email when a package is active in the workflow longer than the specified time frame.

**NOTIFY AFTER HOW MANY HOURS** | Indicate the number of hours that will pass before the system sends the notification email.

**DELETE INSTANCES** | When a Workflow is active and has items routing, the total number will be "In Progress Workflow Instances." An administrator can "DELETE INSTANCES," which will delete ALL instances inside the Workflow.

**IMPORTANT TO NOTE** | This should only be used during testing.

**COPY WORKFLOW** | Workflows can be copied to a new workflow within a single environment. When selected, a pop-up prompts the user to input a name that must be unique from all other workflows. The workflow details can then be modified to accommodate the new workflow business processes.

The screenshot shows the 'etfrieve | CENTRAL' interface. On the left is a dark sidebar with a 'Back' button and a list of settings: 'General Settings' (highlighted with a wrench icon), 'Reminders' (clock icon), 'Assignment Rules' (document icon), 'Package Name Rules' (box icon), 'Privileges' (lock icon), 'Designer' (person icon), and 'Save' (floppy disk icon). The main area is light blue. It contains a 'Workflow Name (Name is required)' text input, a 'Workflow Description' text area, a 'Department' dropdown menu set to 'Unassigned', an 'Effective Date From' text input set to 'October 8, 2024', and a 'Workflow Template Status' dropdown menu set to 'In Development'. Below these is a section for 'In Progress Workflow Instances: 0' with 'PURGE INSTANCES' and 'COPY WORKFLOW' buttons.

**FIGURE 4.9** General Settings

#### 4.6.2 Reminders

Allows a Workflow Administrator to indicate the Workflow and Step level Reminders associated with this Workflow.

Workflow-level Reminders will send one email to a specified user or users when a package has been in process for a certain amount of time. Step-level Reminders are used to send emails as a reminder to a user or multiple users who belong to a Group/Role after a package has been in the user(s) inbox for a certain amount of time. That time is configured in the Workflow Designer Admin.

**NOTE** | Workflow and step-level Reminders, enabled or disabled, are separate processes from the emails sent to users if the Notify tab is configured to send an email. Emails sent when a package moves through a workflow are not dependent upon Reminders being set up. Reminders are generally used to send messages if items have been sitting in inboxes too long.

FIGURE 4.10 Reminders

**WORKFLOW LEVEL** | Workflow-level Reminders are enabled and disabled using the corresponding On/Off toggle switch. If enabled, pending notifications for the packages in the workflow will be checked at the top of each hour. Once any notification date passes the current date and time, a notification email will be generated and sent out. If disabled, any pending notifications will not be sent out. Also, notifications will not be created for packages generated with Reminders disabled, even if Reminders are then enabled later.

- ▶ **Workflow Admin Email Address** – This is the email address for the administrator who will receive the reminder email. Multiple emails can be entered here, separated by semicolons.
- ▶ **Days and Hours | Numerical Inputs**—Together, these inputs determine how long it takes for a workflow-level Reminder to be sent to the Admin.

FIGURE 4.11 Workflow Level Reminders

For example, the Days input has been set to 4 and the Hours input to 6. The admin email is set to Example@domain.com. A form is submitted to kick off the workflow on February 15<sup>th</sup> at 9:30 A.M. If the package has not been submitted to the End Step by February 19<sup>th</sup> at 3:30 P.M., then Example@domain.com will receive a reminder email around 4:00 P.M. that day.

**STEP LEVEL** | Step-level Reminders are enabled and disabled using the corresponding On/Off toggle switch. If enabled, pending notifications for the step will be checked at the top of each hour. Once any notification date passes the current date and time and is in a step with “Enable Reminder Notification” turned on, notification emails will be generated and sent out. If disabled, any pending notifications will not be sent out. Also, notifications will not be created for packages generated with Reminders disabled, even if Reminders are enabled later. Finally, turning this switch off will disable the On/Off switch in the Reminder Configurations for each actor step.

- ▶ Apply to In-Process Packages—If step-level Reminders are turned on, this button allows the user to apply notifications to existing Task Queues. It is only enabled after all changes have been saved to the workflow.
- ▶ Notify Users After | Numerical Inputs—Together, these inputs determine how long it will take for the first reminder email to be sent after a package lands in a user's inbox.
- ▶ Repeat Email Every | Numerical Inputs – Together, these inputs determine how often reminder emails will be sent to a user for a package sitting in their inbox.

**Step Level Reminders** ☒

Apply To In-Process Packages **APPLY**

*Please save changes to Workflow before Applying to in-Process workflows*

Notify Users After

Days  Hours

Repeat Email Every

Days  Hours

FIGURE 4.12 Step-Level Reminders

#### 4.6.2 Assignment Rules

Indicate the forms and/or document types that will be associated with this Workflow. To select a new item, click on the 'Available' radio button.

**SEARCH** | Use search to locate a particular form or Document Type by typing in the Search Bar.

**FILTER BY** | A filter can be applied by selecting one of the options:

- ▶ All
- ▶ Document Types
- ▶ Forms

**DELETE** | The delete function will remove the step properties associated to a given workflow assignment from the step. When removing an Assignment Rule, the system will display a confirmation box if the Assignment Rule is a part of any step's properties.

**Assignment Rules**

**Item Selection**

Select the item(s) for this workflow

Search:

Filter By: **Document Type** ☐ Associated ☒ Available

- ☐ FAO Federal Tax Transcript-Parent
- ☐ FAO Federal Tax Transcript-Student
- ☐ REG Grad Eval Transcript
- ☐ TR Official College Transcript
- ☐ TR Official Final HS Transcript
- ☐ TR Unofficial College Transcript

FIGURE 4.13 Assignment Rules



### 4.6.3 Package Name Rules

A package name is a naming convention associated with a given Workflow. There are three options for naming conventions of the Workflow:

**DEFAULT** | The system will automatically label the Package Name using the Name of the Workflow established in General Settings.

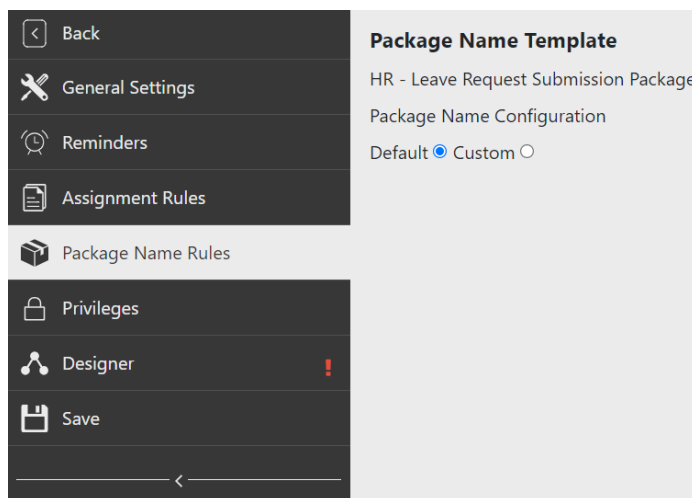


FIGURE 4.14 Package Name Template | Default

**CUSTOM** | Selecting "Custom" will allow you to type your Package Name instead of the Default. Clicking inside the box will list the available key fields or inputs you can use with the words you type. This can provide originator information as searchable items in the inbox.

If a Content document type was selected in the assignment rules, the key fields will be available to use. If a central form is selected in the assignment rules, the selected input fields will be available to use. If multiple documents or forms are associated with the Workflow, the key field codes/input field IDs that all share the same name will appear in the drop-down with the label "common."

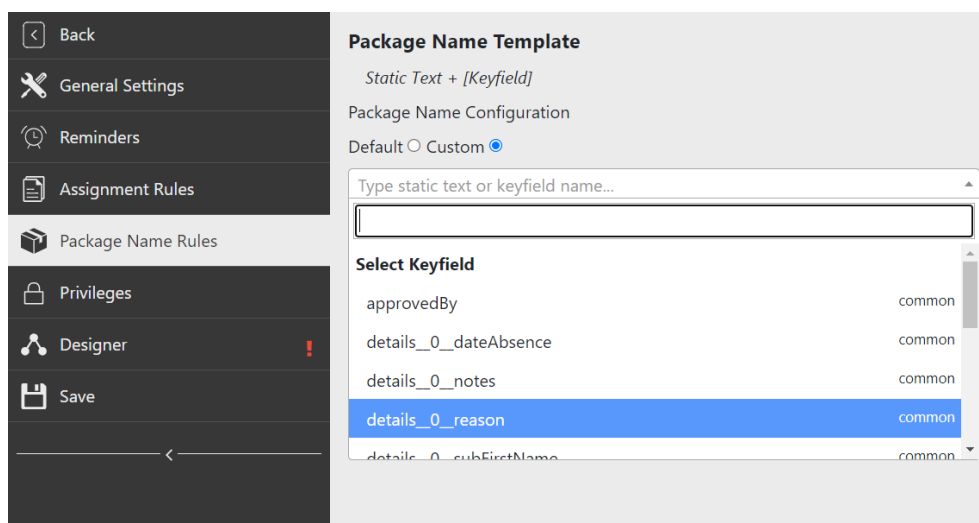


FIGURE 4.15 Package Name Template | Custom

**ITEM TYPE NAME** | Selecting "Item Type Name" will allow you to select a form name for a submitted form or document type name for a submitted Content document to use as a Package Name.

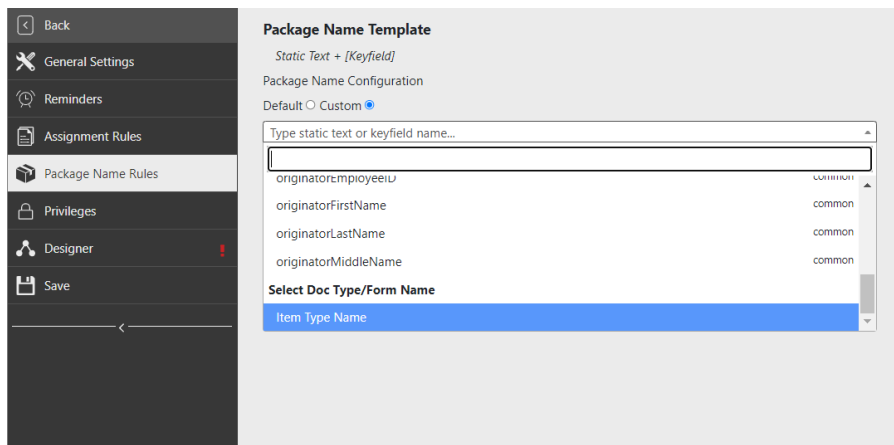


FIGURE 4.16 Package Name Template | Item Type Name

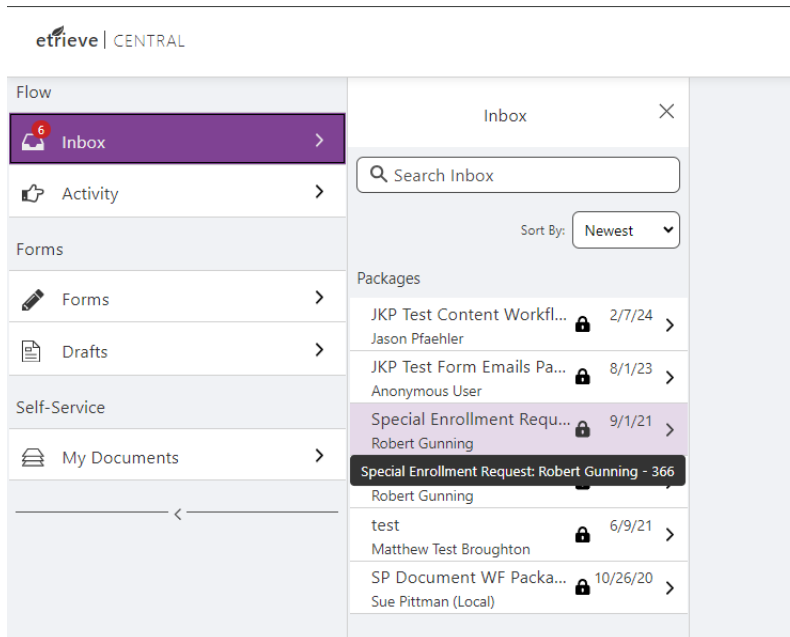


FIGURE 4.17 Central Inbox | Display of Packages

If Item Type Name is part of the naming options for the Package Name Rules, Accumulate will use the Workflow Name if Default is selected on Accumulate and a custom name is selected for the Package Name Rules. When Package Name Rules do not contain Item Type Name as part of the naming options when a customized name is set, Accumulate will use what is defined on Package Name Rules when the default option is selected for that step.

#### 4.6.4 Privileges

Department users can manage the packages directly related to their department's workflows without being given Workflow Admin Privileges in Etrieve Security. To allow this access, the user must have the "Access Etrieve Flow" privilege, and at least one Workflow must be selected to be managed, as found in the Workflow Privileges section in Security. The permissions page of a Workflow with an assignment is shown in Figure 4.2 below.

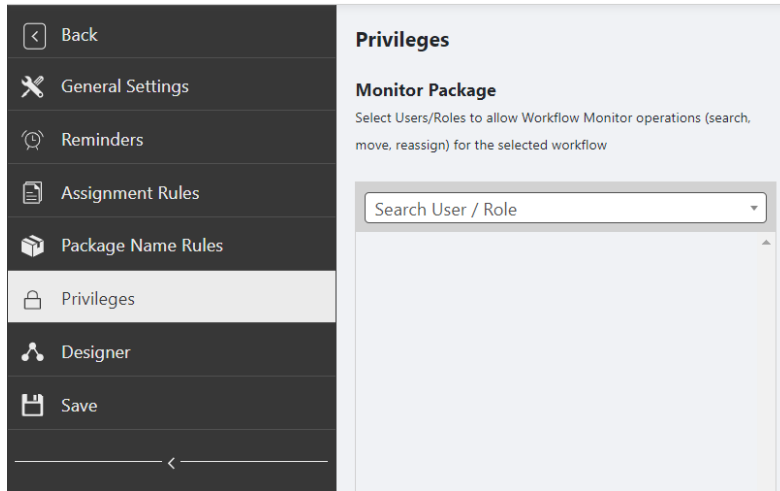


FIGURE 4.18 Workflow Privileges

# 5

## Etrieve Workflow Monitor

### 5.1 Workflow Monitor

Once a workflow moves to production and becomes live, administrators can monitor the status of a workflow and adjust the current workflow's actor or move a workflow package to a different step in the process. This is useful in troubleshooting a stuck package, assisting when a team member is out of the office, or assisting with internal organization changes. Monitoring workflows is a feature available from the settings menu in Etrieve Central. You can select "Monitor," as illustrated below.

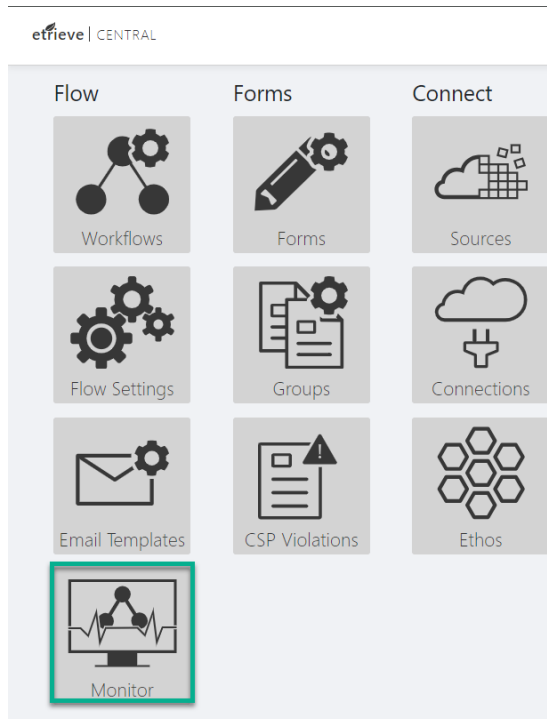


FIGURE 5.1 Etrieve Flow | Monitor

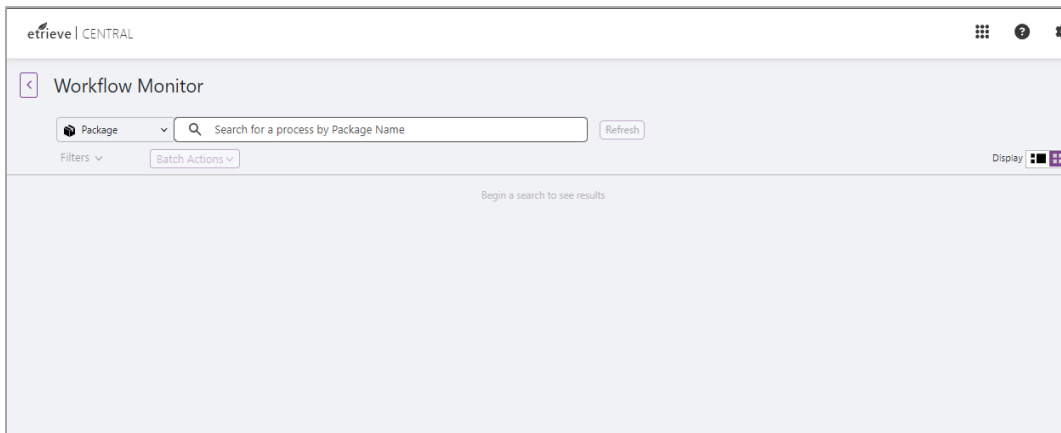


FIGURE 5.2 Workflow Monitor Page

## 5.2 Searching for a Package

No packages are listed when a user first enters the Monitor feature, as seen in Figure 4.3. To find workflows, the user enters the workflow name into the search bar at the top of the page. The workflow must be 'active' to appear in the results, which will appear as illustrated below in Figure 4.4.

Name	Status	Workflow	Workflow ...	Current St...	Time at C...	Time in W...	Date Wor...	Date Pack...	Assigned ...	Error Mes...	Locked By	Actor Filter
AH workflow...	In Progress	AH workflow...		Alexander H...	3 weeks, 1 day	1 month, 2 ...	08-22-2024, ...	09-16-2024, ...	Jason Pfahler		Jason Pfahler	
AH workflow...	In Progress	AH workflow...		Alexander H...	1 month, 0 ...	1 month, 2 ...	08-22-2024, ...	09-06-2024, ...	Alexander H...		Alexander H...	
AH workflow...	In Progress	AH workflow...		Alexander H...	1 month, 3 ...	2 months, 3 ...	07-12-2024, ...	08-16-2024, ...	Alexander H...		Alexander H...	
AH workflow...	In Progress	AH workflow...		Alexander H...	2 months, 3 ...	2 months, 3 ...	07-12-2024, ...	07-12-2024, ...	Alexander H...		Alexander H...	
AH workflow...	In Progress	AH workflow...		Alexander H...	3 months, 0 ...	3 months, 1 ...	06-27-2024, ...	07-03-2024, ...	Wyatt Puckett		Unlocked	
AH workflow...	In Progress	AH workflow...		Alexander H...	3 months, 1 ...	3 months, 1 ...	06-27-2024, ...	06-27-2024, ...	Wyatt Puckett		Unlocked	
akk wf1 Pack...	In Progress	akk wf1		Step 1 - akk ...	2 months, 0 ...	2 months, 0 ...	08-02-2024, ...	08-02-2024, ...	akk g1		Arvind Krish...	
BC ESign Wo...	In Progress	BC ESign Wo...		ESign	3 months, 1 ...	3 months, 1 ...	06-25-2024, ...	06-25-2024, ...	bcheasoftdo...		Unlocked	

FIGURE 5.3 Monitoring Package Search Results

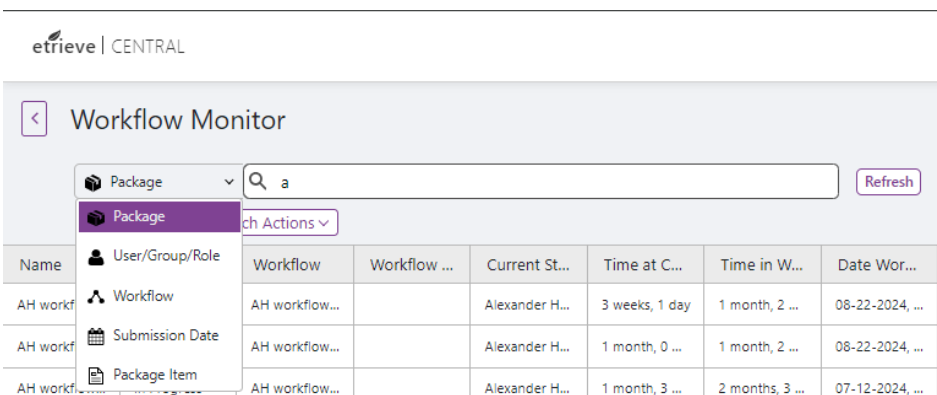


FIGURE 5.4 Search Field Options

As illustrated above, users can search by a variety of different fields, including:

- ▶ Package – searches for package name

- ▶ User/Group/Role – searches for user, group, or role name
- ▶ Workflow – searches for workflow name
- ▶ Submission Date – searches for the date the package was submitted
- ▶ Package Item – searches for package item name

### 5.3 Filtering Search Results

When searching for packages in the Monitor feature, there are a few filters that the user can utilize to narrow the search results further. The search drop-down can be found as seen in the following figure:

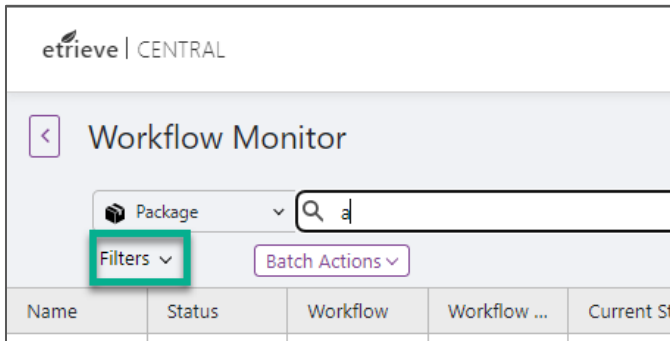


FIGURE 5.5 Filters Drop-down

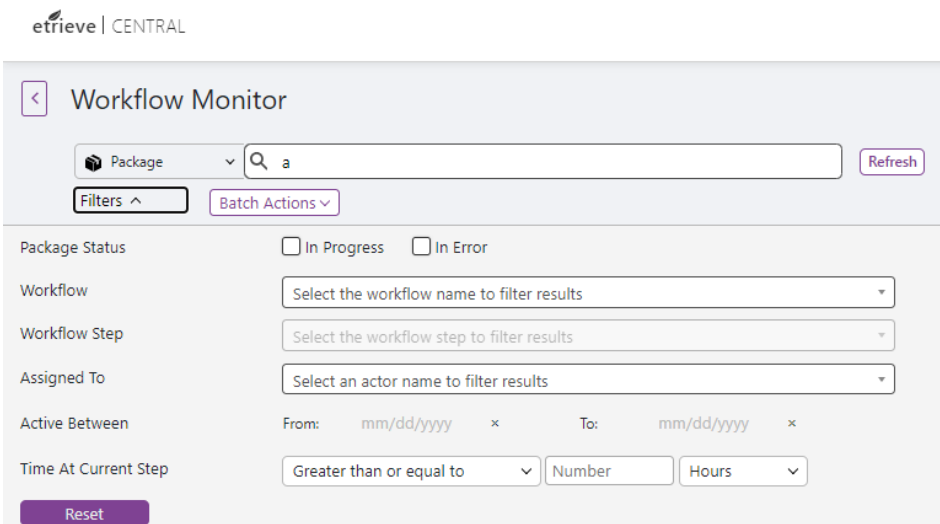


FIGURE 5.6 Filter Options

As shown above, users can filter by:

- ▶ Package Status - In Error and/or In Process packages
- ▶ Workflow Name - if the Search By option is not Workflow Name
- ▶ Workflow Step - available after Workflow Name is selected in the Filter options
- ▶ Assigned To - if the Search By option is not Assigned To
- ▶ Active Between – packages with activity between the two user-provided dates

- Time At Current Step – packages with a user-determined amount of time at their current step

## 5.4 Refreshing Search Results

Once a search has been conducted and results are displayed or no results have been found, the user can refresh the current search to return any updated information in the results list by clicking the Refresh button. Any filters previously utilized by the user remain in effect.

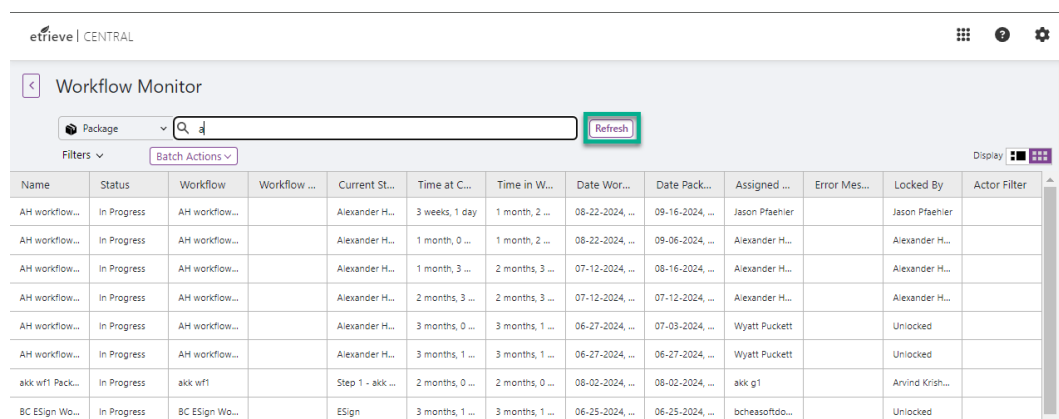


FIGURE 5.7 Workflow Monitor Refresh Button

## 5.4 Search Results View

Searching a keyword will return a list displayed in the search area. The information on each workflow includes:

- 1 **NAME** | The name of the package.
- 2 **STATUS** | The current status of the workflow – In Progress / In Error.
- 3 **WORKFLOW** | The name of the workflow.
- 4 **WORKFLOW DESCRIPTION** | The description of the workflow.
- 5 **CURRENT STEP** | The current step at which the workflow is waiting.
- 6 **TIME AT CURRENT STEP** | The amount of time the workflow has been at the current step in the flow.
- 7 **TIME IN WORKFLOW** | The amount of time the workflow has been active for the package.
- 8 **DATE WORKFLOW STARTED** | The date the package’s initial submission occurred, and it entered the workflow.
- 9 **DATE PACKAGE STARTED** | The date at which the package was started.
- 10 **ASSIGNED TO** | The user that must take action before the workflow can proceed.
- 11 **ERROR MESSAGES** | Any error messages if the workflow is in “In Error” status.
- 12 **LOCKED BY** | If any user has locked the workflow, the user’s name appears here. If the workflow is not locked, the section will instead read “Unlocked.”

As illustrated below, the user clicks on an individual row on the page, and a preview with further details and actions appears at the bottom of the page. The additional information also shows a preview of the workflow and an overview of any items attached to the package.



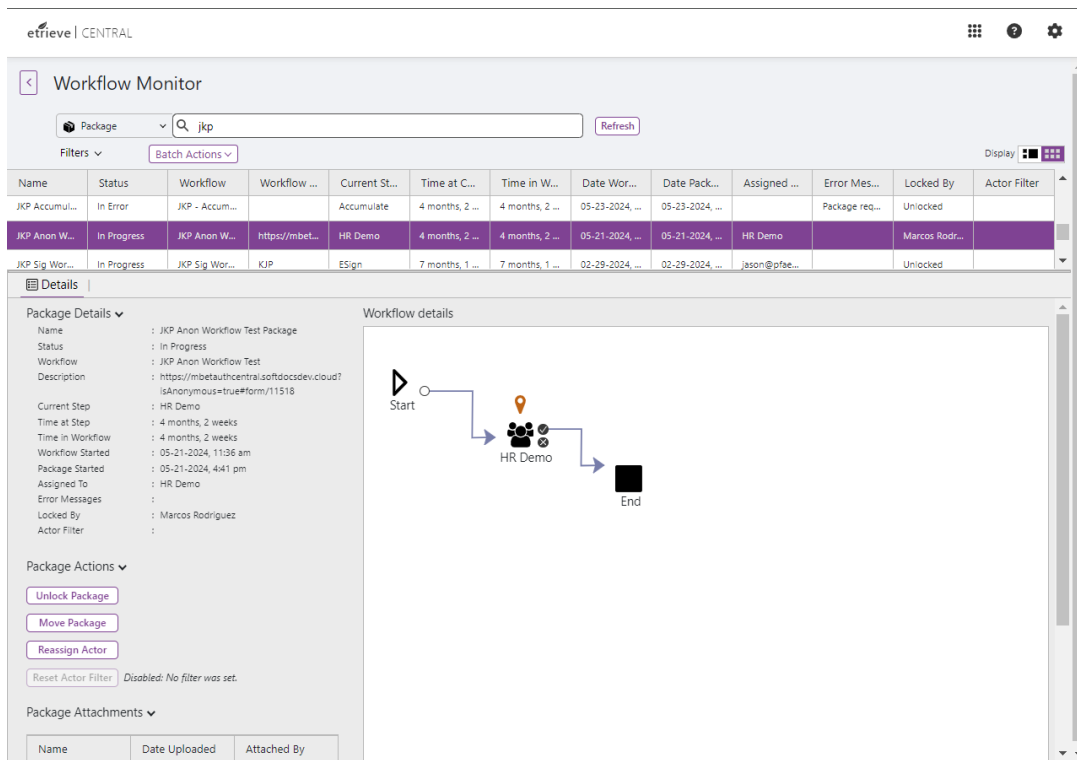


FIGURE 5.8 Monitor Package Detail View

The user can change how search results are displayed on this page so that the list appears on the left side and the preview appears on the right. To access the alternate view, select the toggle display icon. This alternate view can be seen in the following figure.

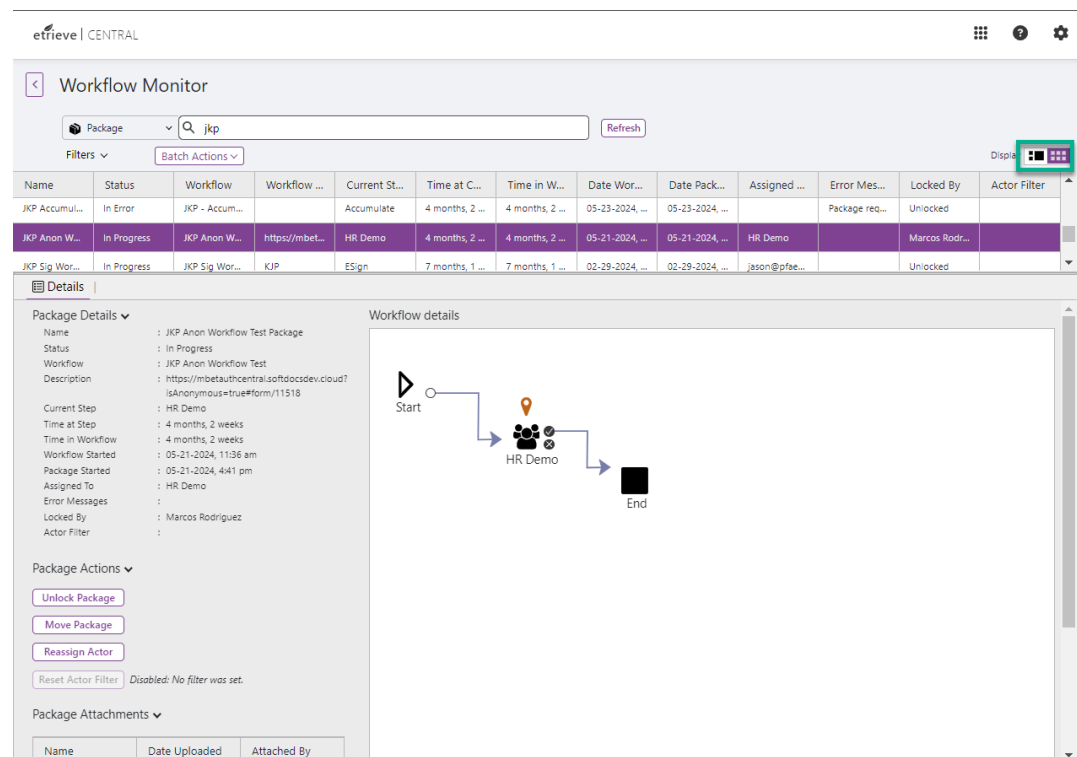


FIGURE 5.9 Monitor Package Detail Alternate View

## 5.5 Individual Actions in Package Details

In the section of the page containing the details for the selected package, users can select the following actions:

- 1 **UNLOCK PACKAGE** | This action allows the Workflow Administrator to unlock users' packages.

A message will let the user know the Unlock was successful. When a package is not locked by a user or on a non-actor step, the Unlock Package button will be disabled.

The screenshot displays the Etrieve Flow Administrator interface. At the top, the 'Workflow Monitor' section shows a table of workflow packages. Below this, the 'Package Details' section for a selected package is visible. The 'Package Actions' section contains three buttons: 'Unlock Package' (highlighted with a red box), 'Move Package', and 'Reassign Actor'. The 'Reset Actor Filter' button is disabled with the message 'Disabled: No filter was set.' The 'Package Attachments' section is also visible at the bottom.

Name	Status	Workflow	Workflow ...	Current St...	Time at C...	Time in W...	Date Wor...	Date Pack...	Assigned ...	Error Mes...	Locked By	Actor Filter
JKP Accumul...	In Error	JKP - Accum...		Accumulate	4 months, 2 ...	4 months, 2 ...	05-23-2024, ...	05-23-2024, ...		Package req...	Unlocked	
JKP Anon W...	In Progress	JKP Anon W...	https://mbet...	HR Demo	4 months, 2 ...	4 months, 2 ...	05-21-2024, ...	05-21-2024, ...	HR Demo		Marcos Rodr...	
JKP Sig Wor...	In Progress	JKP Sig Wor...	KJP	ESign	7 months, 1 ...	7 months, 1 ...	02-29-2024, ...	02-29-2024, ...	jason@pfae...		Unlocked	

**Package Details**

Name : JKP Anon Workflow Test Package  
Status : In Progress  
Workflow : JKP Anon Workflow Test  
Description : https://mbetauthcentral.softdocsdev.cloud?isAnonymous=true#form/11518  
Current Step : HR Demo  
Time at Step : 4 months, 2 weeks  
Time in Workflow : 4 months, 2 weeks  
Workflow Started : 05-21-2024, 11:36 am  
Package Started : 05-21-2024, 4:41 pm  
Assigned To : HR Demo  
Error Messages :  
Locked By : Marcos Rodriguez  
Actor Filter :

**Package Actions**

**Unlock Package**  
Move Package  
Reassign Actor  
Reset Actor Filter Disabled: No filter was set.

**Package Attachments**

Name Date Uploaded Attached By

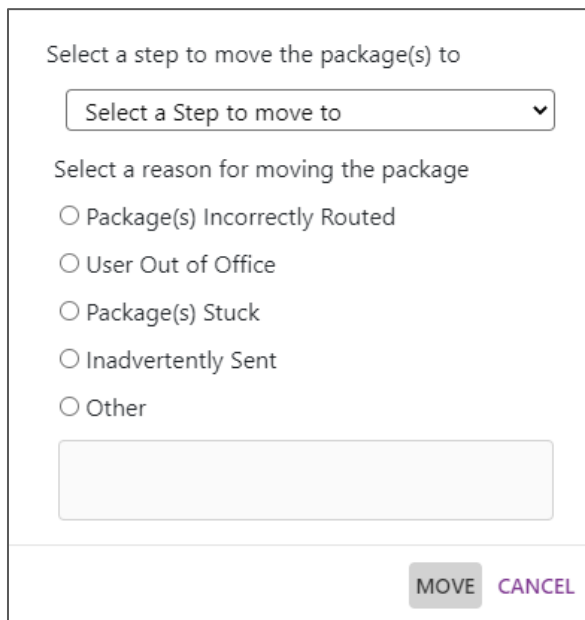
**Workflow details**

Start → HR Demo → End

FIGURE 5.10 Unlock Package | Disabled

- 2 **MOVE PACKAGE** | This action allows the user to change which step the workflow for the selected package is currently in. Only unlocked packages may be moved.

When selected, the user is prompted to input the step to move the package and indicate a reason for moving it. The information that must be filled out includes selecting which step in the appropriate workflow to move the package to and a reason for the move. Then, the user selects "Move," and the package is moved to the selected step.



Select a step to move the package(s) to

Select a Step to move to ▼

Select a reason for moving the package

☐ Package(s) Incorrectly Routed

☐ User Out of Office

☐ Package(s) Stuck

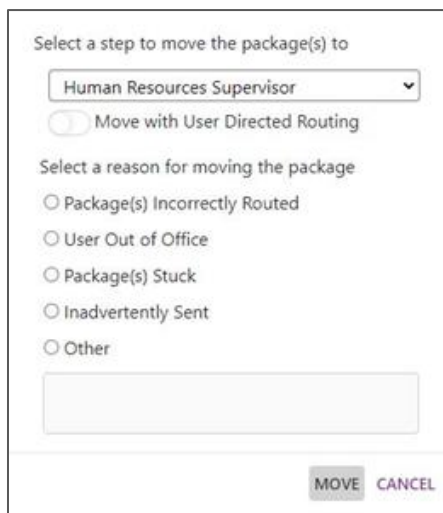
☐ Inadvertently Sent

☐ Other

MOVE CANCEL

FIGURE 5.11 Move Package Action Overlay

If the package selected has a flow with a step UDR (User Direct Routing) Drilldown enabled, the Workflow Monitor can detect if the user is moving the package to that step. When this occurs, the “Move” action will display a toggle to allow the Administrator the ability to assign the package directly to the Group/Role step based on the step or select from the list of Users within the UDR list based on the Group/Role step when the Drilldown is enabled.



Select a step to move the package(s) to

Human Resources Supervisor ▼

☐ Move with User Directed Routing

Select a reason for moving the package

☐ Package(s) Incorrectly Routed

☐ User Out of Office

☐ Package(s) Stuck

☐ Inadvertently Sent

☐ Other

MOVE CANCEL

FIGURE 5.12 Move Package action with User Directed Routing (unselected)

Select a step to move the package(s) to

Human Resources Supervisor

☒ Move with User Directed Routing

Search

Users in Human Resources Supervisor

☐ Pat Administrator

Select a reason for moving the package

☐ Package(s) Incorrectly Routed

☐ User Out of Office

☐ Package(s) Stuck

☐ Other

MOVE CANCEL

FIGURE 5.13 Move Package action with User Directed Routing (selected)

If the package selected is within a workflow that has an E-Sign step, then validations will occur to ensure the form has all the information needed to move the package, as well as update particular form fields based on where the package is moved. The following are some validations and behaviors that will occur when an E-Sign package is moved:

- ▶ An e-sign package cannot be moved to an E-Sign step if the field housing the email address does not have a valid email address. When this occurs, the package can be moved backward in the workflow to a non-E-Sign actor step, Start Step, or use Reassign to allow the email address field to be updated on the form.
- ▶ When an E-Sign package is moved to or before an E-Sign step in the workflow, all fields used to capture signatures for subsequent steps E-Sign steps will be cleared to allow new signatures to be obtained.
- ▶ When an E-Sign package is moved to or after an E-Sign step, then only the fields used signatures at that current E-Sign step will be cleared.
- ▶ Any prior links that were sent to the Signer Recipient will be invalid after the package has been moved.

You are moving a package to an E-Sign step or moving a package prior to an E-Sign step. If you proceed with moving, any E-Sign signatures obtained on or after the step will be removed.

Select a step to move the package(s) to

Start

Select a reason for moving the package

☐ Package(s) Incorrectly Routed

☐ User Out of Office

☐ Package(s) Stuck

☐ Inadvertently Sent

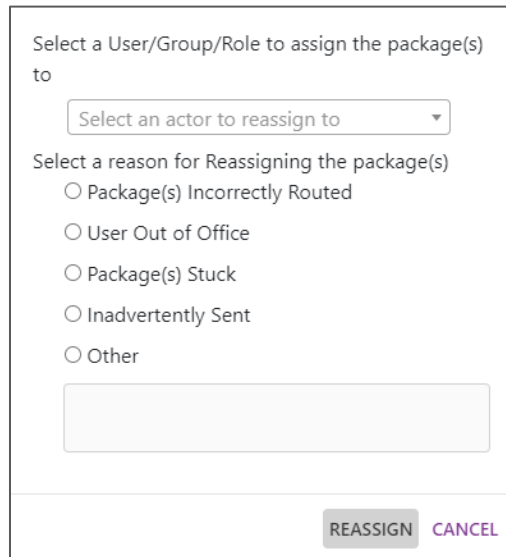
☐ Other

MOVE CANCEL

FIGURE 5.14 Warning message displayed when moving an E-Sign package

- 3 **REASSIGN ACTOR** | This action allows the user to reassign the package to another user to complete the action needed for the current workflow step.

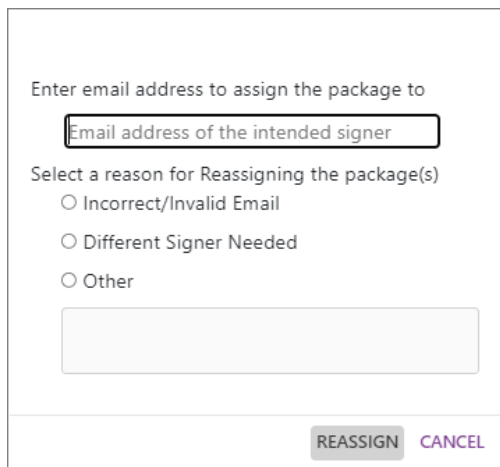
When selected, the user will be prompted to select a User/Group/Role to assign the package and indicate a reason for the package move. This information must be completed before reassignment can occur. Then, the user selects the “Reassign” button, and the package is reassigned.



The form is titled "Select a User/Group/Role to assign the package(s) to". It features a dropdown menu with the placeholder text "Select an actor to reassign to". Below this, the text "Select a reason for Reassigning the package(s)" is followed by five radio button options: "Package(s) Incorrectly Routed", "User Out of Office", "Package(s) Stuck", "Inadvertently Sent", and "Other". A text input field is located below the radio buttons. At the bottom right, there are two buttons: "REASSIGN" and "CANCEL".

FIGURE 5.15 Reassign Actor Action Overlay

When reassigning a package that resides on an E-Sign step, Workflow Monitor will allow the administrator to type in an email address for the package. This will be used to send the form to the Signer Recipient designated by that email address and update the package history. Any links to the form in the email sent to the prior Signer Recipient for this E-Sign step will be invalid after reassigning. A warning will display if the email address entered is invalid (does not follow a standard email structure).

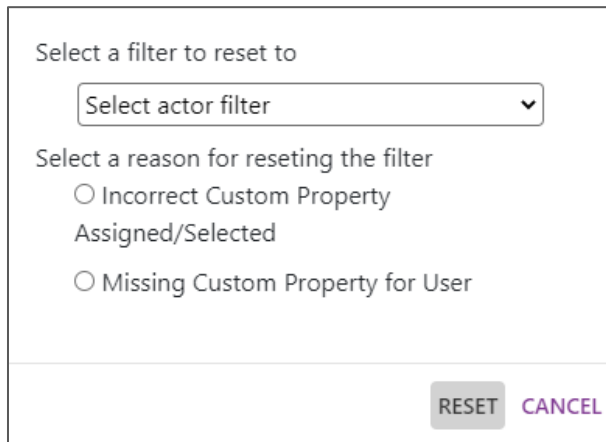


The form is titled "Enter email address to assign the package to". It features a text input field with the placeholder text "Email address of the intended signer". Below this, the text "Select a reason for Reassigning the package(s)" is followed by three radio button options: "Incorrect/Invalid Email", "Different Signer Needed", and "Other". A text input field is located below the radio buttons. At the bottom right, there are two buttons: "REASSIGN" and "CANCEL".

FIGURE 5.16 Reassigning to E-Sign Signer Recipient

- 4 **RESET ACTOR FILTER** | A user can take an individual action on a package with an Actor Filter. When selecting the “Reset Actor Filter,” a user is allowed to change an incorrect actor filter. The user will be prompted to provide which

filter to reset and a reason for the reset. If no actor filter was set in the Workflow, the Reset Actor Filter button will be deactivated, and the user cannot select it as an action.



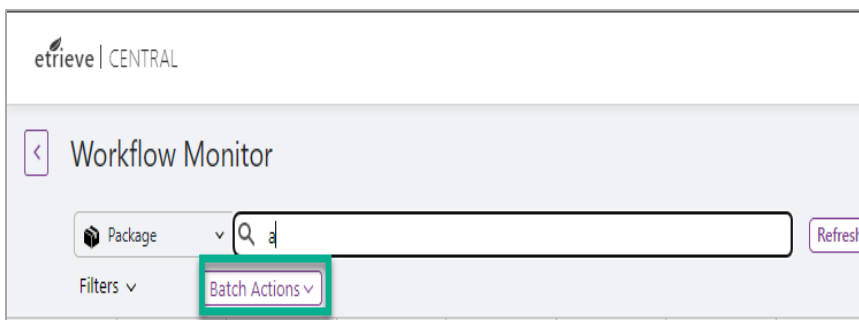
The dialog box is titled "Reset Actor Filter Overlay". It contains two main sections. The first section is "Select a filter to reset to" with a dropdown menu currently showing "Select actor filter". The second section is "Select a reason for resetting the filter" with two radio button options: "Incorrect Custom Property Assigned/Selected" and "Missing Custom Property for User". At the bottom right, there are two buttons: "RESET" (disabled) and "CANCEL" (active).

FIGURE 5.17 Reset Actor Filter Overlay

- 5 **INACTIVE WORKFLOW ACTIONS** | When a Workflow is inactive, individual actions such as reassigning and moving can still be performed.

#### 4.6 Batch Actions

At the top of the page, above search results, there is a dropdown menu that allows users to reassign multiple workflows at once. When the user selects the dropdown, checkboxes prompt them to select which packages to reassign.



The screenshot shows the "etrieve | CENTRAL" logo at the top left. Below it is a "Workflow Monitor" header with a back arrow icon. Under the header, there is a "Package" dropdown menu, a search bar with a magnifying glass icon and the letter "a", and a "Refresh" button. Below the search bar, there is a "Filters" dropdown menu and a "Batch Actions" dropdown menu, which is highlighted with a red box.

FIGURE 5.18 Batch Actions Dropdown

etrieve | CENTRAL

Workflow Monitor

Package

Q a

Refresh

Filters

Cancel

Move Selected

Select one or more of the packages below to Move: 0 selected

	Name	Status	Workfl...	Workfl...	Curre...	Time ...	Time i...	Date ...	Date P...	Assign...	Error ...	Lock
<input checked="" type="checkbox"/>	DEMO -...	In Progr...	_DEMO ...		Start	4 seconds	3 month...	06-28-2...	10-08-2...	Erika Yu...		Unloc
<input type="checkbox"/>	DEMO -...	In Error	_DEMO ...		Approve...	3 weeks...	3 month...	06-28-2...	09-11-2...		We have...	Unloc
<input type="checkbox"/>	DEMO -...	In Error	_DEMO ...		Approve...	3 weeks...	3 month...	06-10-2...	09-11-2...		We have...	Unloc
<input type="checkbox"/>	DEMO -...	In Progr...	_DEMO ...		Depart...	2 month...	2 month...	07-16-2...	08-06-2...	Erika Yu...		Erika
<input type="checkbox"/>	DEMO -...	In Progr...	_DEMO ...		Depart...	2 month...	4 month...	05-29-2...	08-02-2...	Clinton ...		Clinto
<input type="checkbox"/>	DEMO -...	In Progr...	_DEMO ...		Depart...	2 month...	3 month...	07-08-2...	07-28-2...	Lena Ma...		Lena
<input type="checkbox"/>	DEMO -...	In Progr...	_DEMO ...		Depart...	2 month...	2 month...	07-28-2...	07-28-2...	FLOW-D...		David

Details

Package Actions

Unlock Package

Disabled: Package is unlocked.

Move Package

Reassign Actor

Disabled: Currently at non-actor step.

Reset Actor Filter

Disabled: No filter was set.

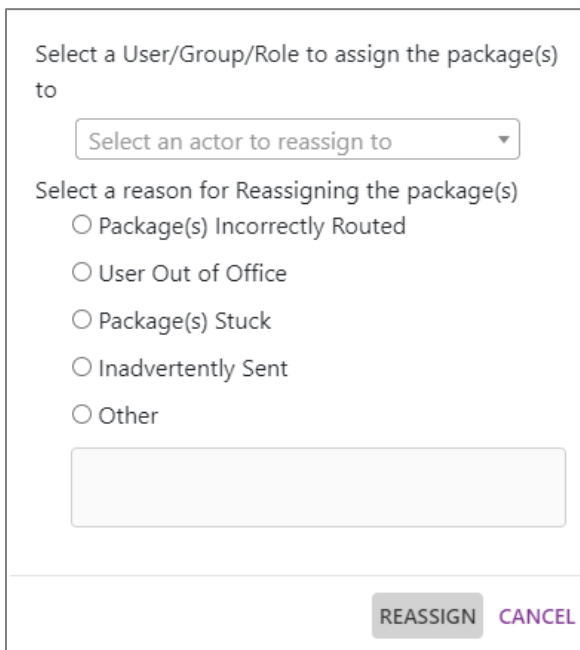
Package Attachments

Department B

FIGURE 5.19 Batch Actions Multiple Package Selection

Then, the user selects “Reassign Selected,” they will be prompted to choose which user to reassign the packages to and the reason for the reassignment. The available reasons include:

- ▶ Package(s) Incorrectly Routed
- ▶ User Out of Office
- ▶ Package(s) Stuck
- ▶ Inadvertently Sent
- ▶ Other – a textbox to explain the reason for reassignment

The image shows a 'Batch Action Reassignment Overlay' dialog box. It has a title bar at the top. Below the title bar, the text 'Select a User/Group/Role to assign the package(s) to' is displayed. Underneath this text is a dropdown menu with the placeholder text 'Select an actor to reassign to'. Below the dropdown menu, the text 'Select a reason for Reassigning the package(s)' is displayed. Underneath this text are five radio button options: 'Package(s) Incorrectly Routed', 'User Out of Office', 'Package(s) Stuck', 'Inadvertently Sent', and 'Other'. Below the radio button options is a text input field. At the bottom of the dialog box, there are two buttons: 'REASSIGN' and 'CANCEL'.

**FIGURE 5.20** Batch Action Reassignment Overlay

When the user selects “Reassign,” the selected packages will be reassigned to the selected actor. During reassignment, there will be an indication that the Users or Groups are not included in the User or Group permissions assigned to the current Step. This indicator identifies the newly assigned users or groups that fall outside of the user/group permissions based on permissions configured for the workflow step.

By utilizing the search results filtering feature, users can move one or more packages—through batch actions—from the list of results within a single workflow to a different step of the same workflow.

When a package is moved to a Group step with UDR with drill-down enabled, it is reassigned to the Group; this is the only circumstance in which the package is reassigned outside of the step’s execution rules. In all other cases, the step’s execution rules will occur when the package is moved.

Moving a split package will locate split packages, delete them, and create a new one for the step to which the package has been moved.

There are limitations to the ability of users to move a single package or multiple packages. The “move” action cannot occur if the current step of the package does not have an Actor. Additionally, users cannot move a Content document to a Start Step. Packages with multiple originators who have submitted documents separately cannot be moved. Finally, packages cannot be moved if their workflow is inactive.



# 6

## Etrieve Email Templates

### 6.1 Email Templates

Email Templates allow Central Administrators to create, modify, and delete custom email templates that integrate into Workflow notifications.

Email Templates are a feature available from the settings menu in Etrieve Central. Select “Email Templates,” as illustrated below.

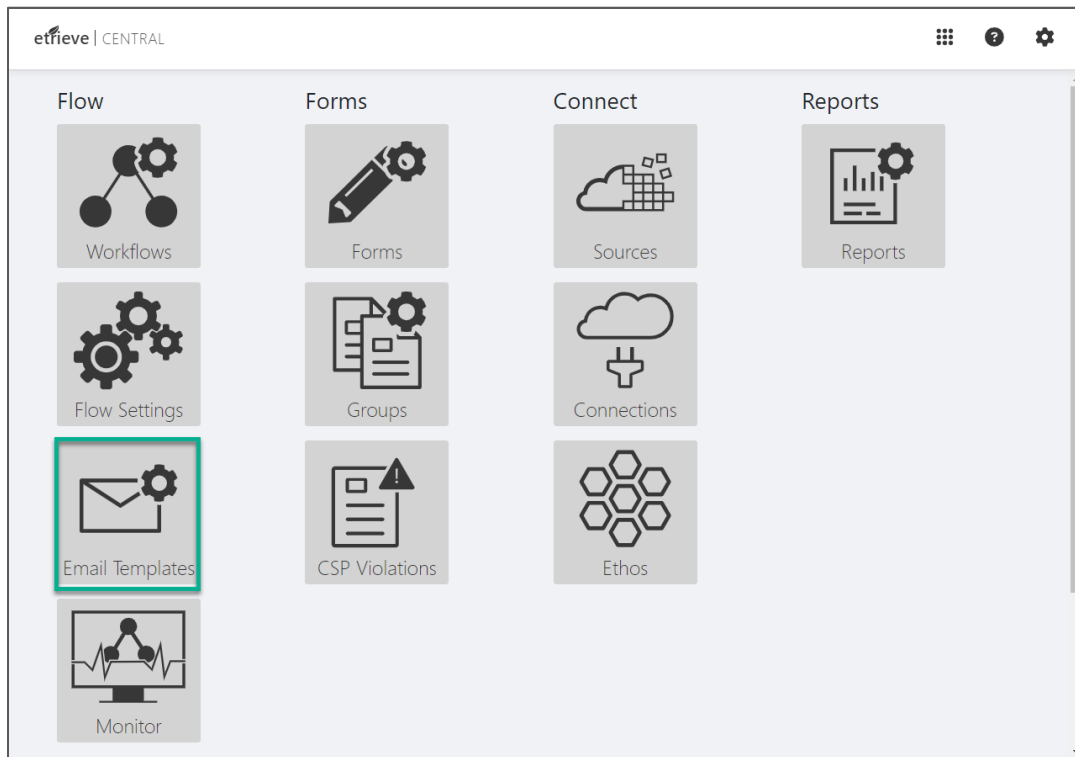


FIGURE 6.1 Email Template menu item

The page for Email Templates appears as shown below, with a list of all the currently created email templates organized by name.

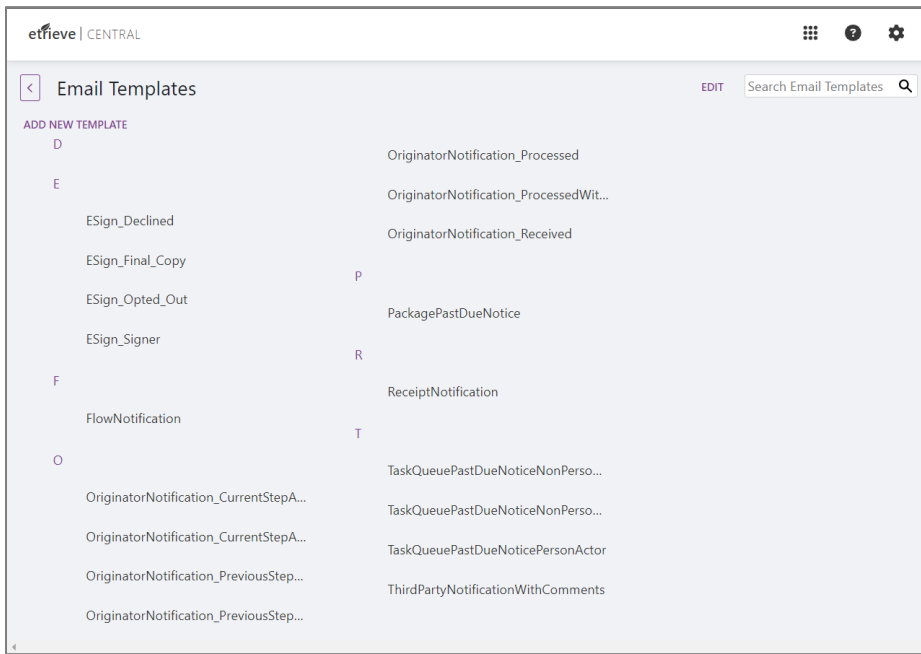


FIGURE 6.2 Email Template Main Menu

## 6.2 Adding and Editing an Email Template

A new Email Template can be added by selecting “Add New Template” from the Email Template page.

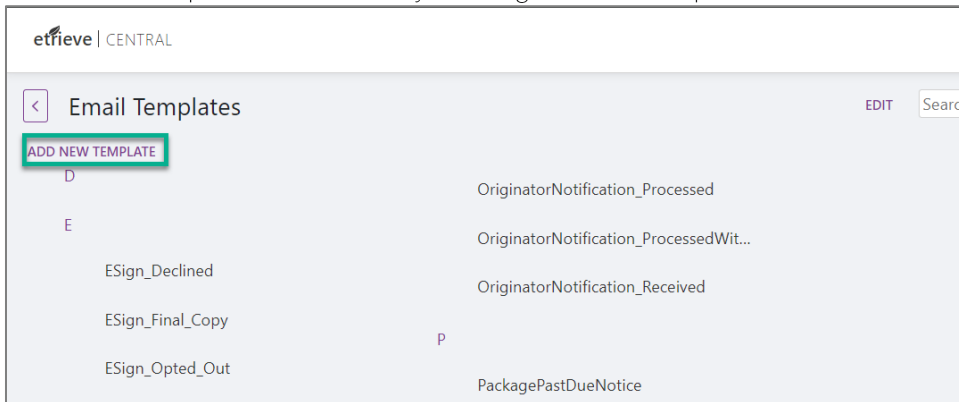


FIGURE 6.3 Email Template Add New Template button

Once selected, the administrator will navigate to a new page with the General Settings for the new template.

etrieve | CENTRAL

Back

General Settings

Save

Name (Name is required)

Name

Subject (Subject is required)

Body (Body is required)

COPY EMAIL TEMPLATE

EMAIL TEMPLATE KEYS HELP

SHOW KEYS

FIGURE 6.4 Email Template “Add New Template” General Settings page

Under “General Settings,” the administrator must complete three sections: Name, Subject, and Body. When finished, the administrator can select “Save” from the left-side panel, and the template will be saved to available templates.

Otherwise, once the administrator fills out the required fields, he or she can also select “Copy” from the General Settings page to create a duplicate of the email template, which will make a duplicate and automatically save it without the option to edit it first, leaving the original template open. All templates must have unique names. To edit the copy created, the user must close the original template and open the newly created template.

etrieve | CENTRAL

Back

General Settings

Save

Name

Name of Template

Subject

Subject

Body

Email Contents are found here.

COPY EMAIL TEMPLATE

EMAIL TEMPLATE KEYS HELP

SHOW KEYS

FIGURE 6.5 Email Template Copy selection

If the administrator does not save the template before selecting “Copy,” a warning notification will appear asking whether to discard the changes made to the current template.

Discard Changes?

There are unsaved changes. Leaving without saving will discard any changes. Would you like to continue and lose any changes?

CONFIRM

CANCEL

FIGURE 6.6 Email Template Copy unsaved changes warning

To edit a template, a user must select the name from the Email Template landing page. The page to edit a template is identical to the page for adding a template—simply fill out the information and select “Save.”

5.3 Email Template Keys

When creating or editing an email template, the administrator may want to utilize Email Template Keys to display variable data that will be taken from the workflow where the email template is used. Users can select ‘SHOW KEYS’ in the bottom right corner of the edit/add email template page to see a list of available keys. Selecting an Email Template Key copies it to the clipboard for convenient pasting into the email body.

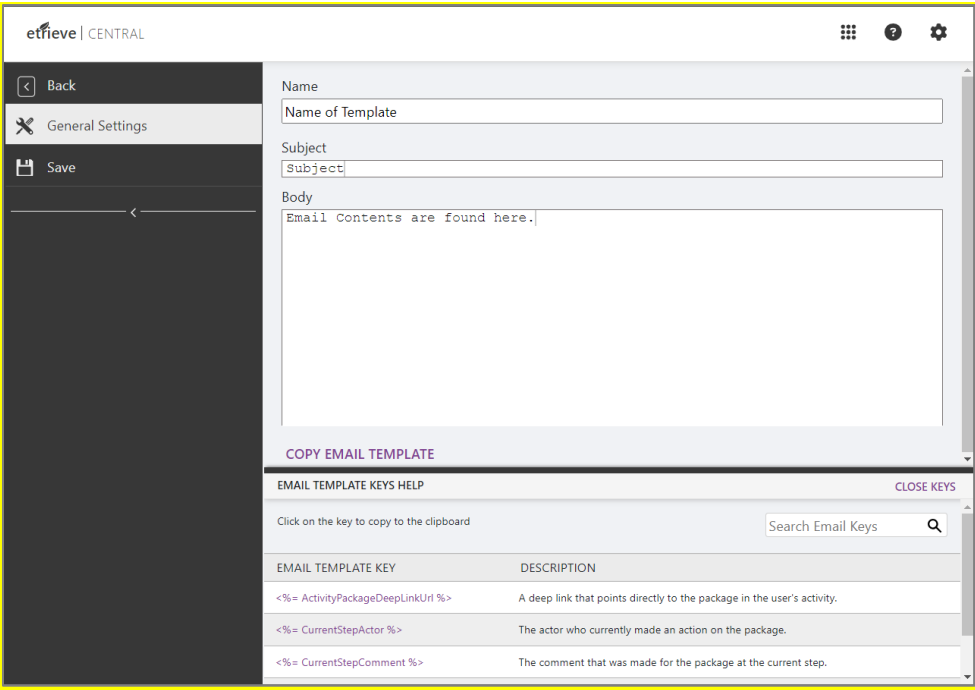


FIGURE 6.7 Email Template Key Selection

Email template keys can be filtered/searched by utilizing the search bar in the upper right-hand corner of the Email Template Keys Help section.

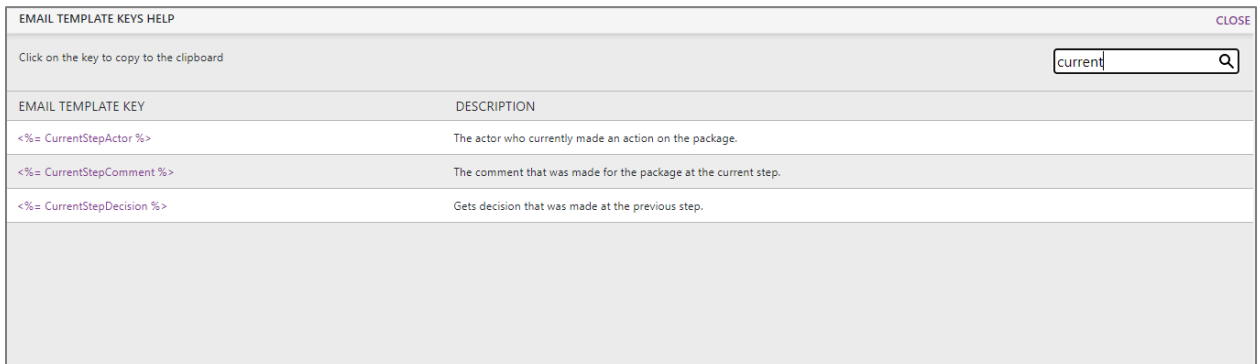


FIGURE 6.8 Email Template and searching for Template Keys

Additionally, input data from Forms or Documents integrated with a workflow can be added as part of the email body. Use the following key to insert an input:

**<%= Input {SelectedFieldInputID} %>**

The user must replace “SelectFieldInputID” with the input ID that should be displayed in the email body.

Note: The input fields in the email body must match those integrated with the workflow where the template is used to send a step notification.

Email template keys that produce a link provide a URL to the form within the email body. For example, the “<%= Esign %>” email template key will produce a URL for a Signer Recipient who does not have an internal account for that person to sign a form.

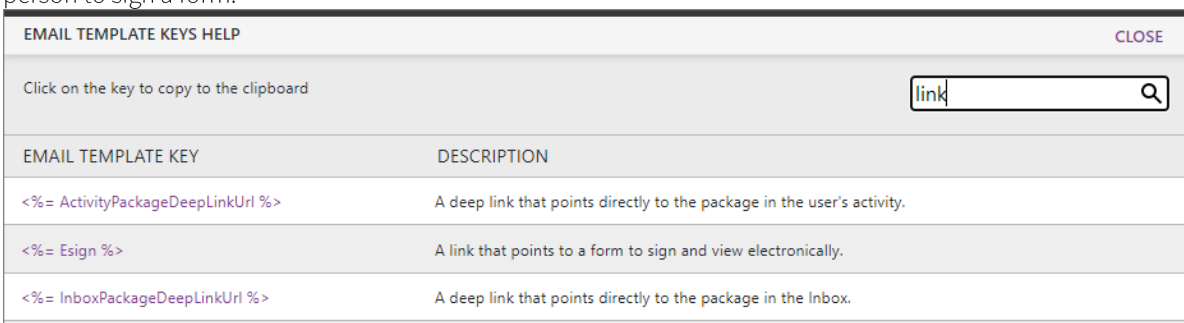


FIGURE 6.9 Email Template Keys Help

The data keys are displayed with a different color in the email body to highlight and differentiate them from the regular text. The key syntax might be wrong if a data key is not displayed with a different color. Data keys start with ‘<%=’ and end with ‘%>’.



FIGURE 6.10 Email Template Example with Data Keys

## 6.4 Delete an Email Template

To delete an email template, the administrator must first navigate to the list of email templates. Then, selecting “Edit” in the upper right-hand corner of the page (next to the Search) will produce checkboxes next to each template. The administrator can then select the templates that need to be deleted and select “Delete” in the upper right-hand corner of the page. A confirmation message will appear asking the user to confirm the deletion(s).

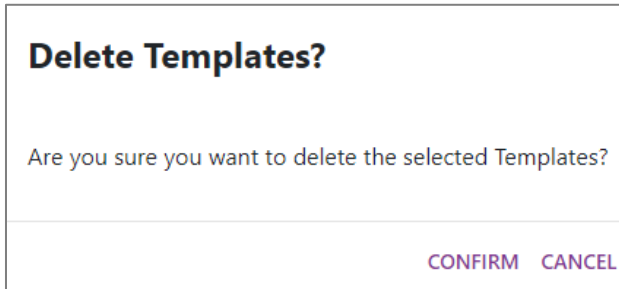


FIGURE 6.11 Delete Email Template warning

To exit “Edit” mode, select “Cancel” on the top right-hand corner of the page.

**NOTE** | Email templates used in workflow notifications and default templates for E-Sign cannot be deleted. An error message will be displayed when a template delete action cannot be completed successfully due to the reference restriction.

## 6.5 Using Email Template in Notify Setting

Inside a workflow, in the Workflow Designer, the administrator can select which Email Template to use for which type of notification recipient. Each of these notifications can be disabled as needed. All the template dropdowns contain the corresponding base and custom email templates you created.

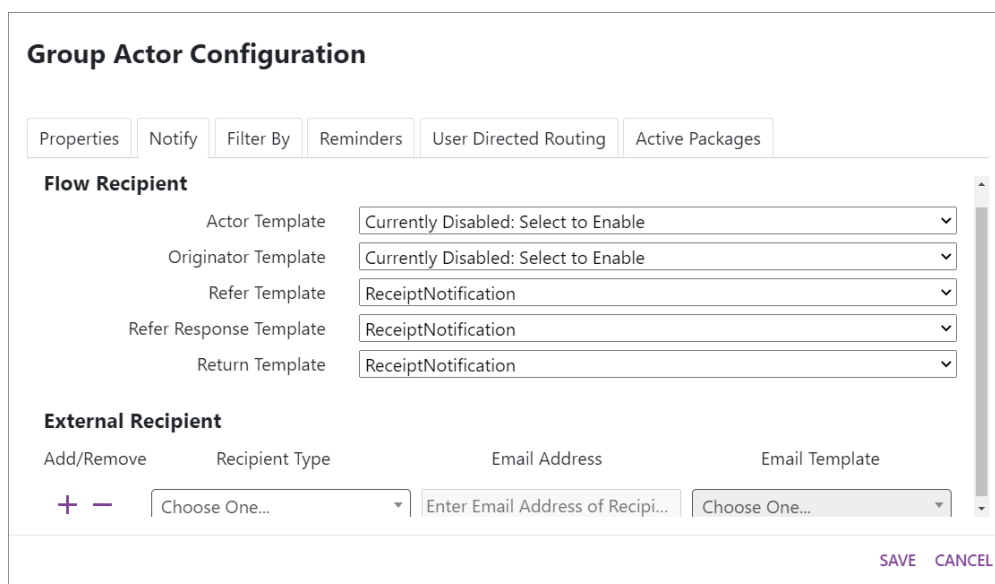


FIGURE 6.12 Group Actor Configuration with option to select Email Templates

## 6.6 Markdown Language in Email Body

The email template’s body supports basic markdown syntax to enhance the notifications sent by the flow steps. Some of the supported markdown features are listed below:

	Markdown	Example
1	Set html headings by using # before a text # heading level 1 ## heading level 2 ### heading level 3 #### heading level 4	#Important Email <b>Important Email</b>
2	Make the text bold by adding two asterisks before and after the text you want to bold <b>**Text**</b>	In this line this is my <b>**bold text**</b> In this line this is my <b>bold text</b>
3	Make the text italic by adding an asterisk before and after the text you want to make it italic <i>*Text*</i>	In this line this is my <i>*italic text*</i> In this line this is my <i>italic text</i>  In this line this is my <b><i>***bold italic text***</i></b> In this line this is my <b><i>bold italic text</i></b>
4	To create a blockquote, add a > in front of the paragraph. > Paragraph	This is a blockquote line This is a blockquote line
5	Display an image using the following syntax ![image description, it is optional](image URL)  We recommend that you have the images available for public access from a Content management system or website.	 The image will be rendered in the email, see example in the <a href="#">Figure 10 Email created using markdown</a>

## 6.7 Email Template Example with Markdown and Keys

The following images show how email template keys and markdown syntax can be utilized to customize emails for notifications.

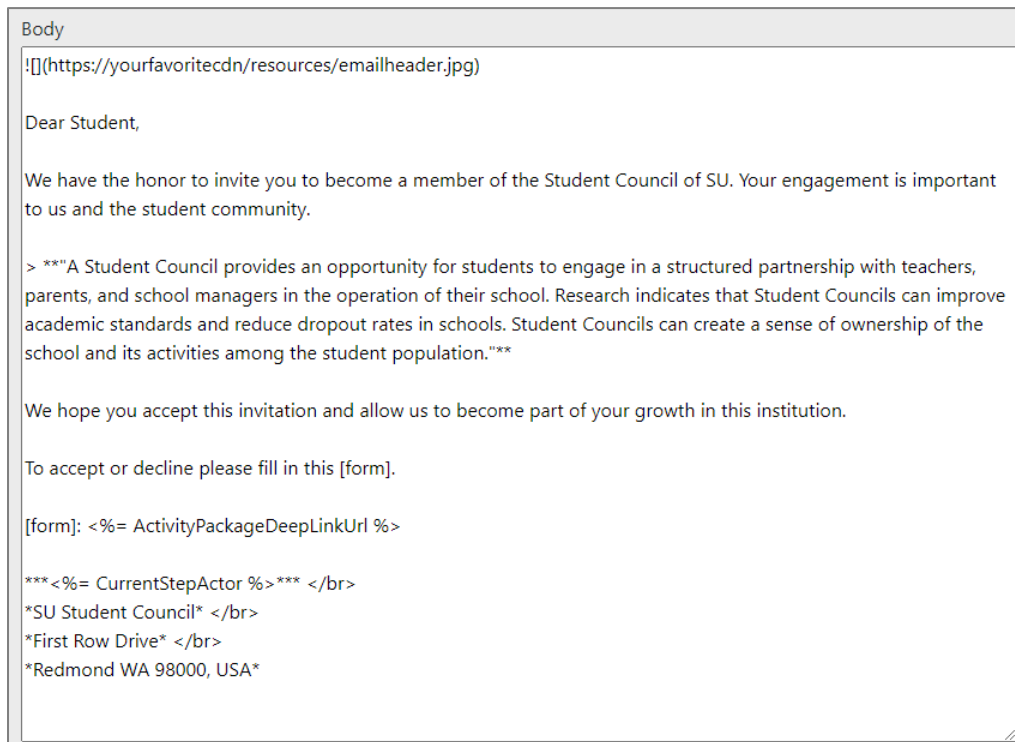


FIGURE 6.13 Email Template Example with Markdown and Template Keys

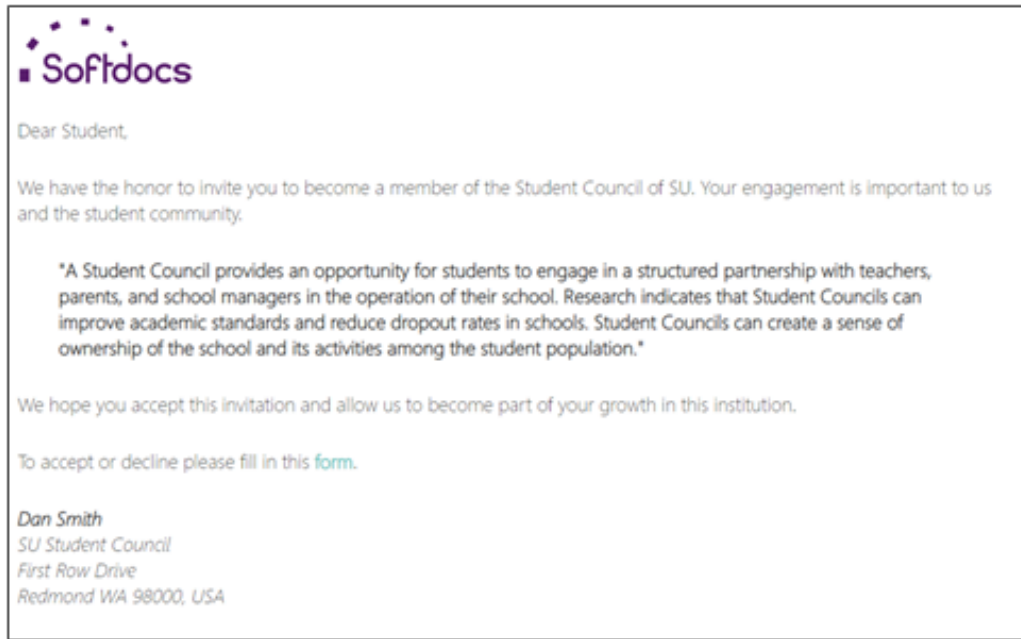


FIGURE 6.14 Result of Email Template with Markdown and Template Keys

## 6.8 Unique Notification Subject Lines Using Email Template Keys

IMPORTANT TO NOTE: Sometimes, emails may be grouped when the conversation view setting is turned on within your email service provider.

Emails are grouped if each message meets the following criteria:

- ▶ The same recipients, senders, or subject as a previous message
- ▶ A reference header with the same IDs as a previous message
- ▶ Sent within one week of a previous message

To prevent grouped emails:

- ▶ Create a new subject for each message you don't want to group.
- ▶ Send each message with a unique reference header value that doesn't match a previous message.



# 7

## Etrieve Flow Sample Workflows

### 7.1 Sample Workflows

The following chapter of this manual provides Sample Workflows that will provide users with a point of reference and illustrations of Workflows to help guide users in designing your institution's Workflows.

#### Common Properties and Tabs

**PROPERTIES TAB** | The Properties tab for most actor and activity configurations has common configurations.

- The Enforce Package Review button can be toggled to require any actors at this step to perform a package review before the workflow can proceed.
- The Enable Refer button can be toggled to enable or disable the option to refer the document to other users at this step in the workflow.
- The Enable Return to Previous button can also be toggled to enable or disable the option to return the document to the previous actor in the workflow.
- The Location (x, y) fields provide the exact coordinate points on the Workflow Designer Configuration Area where the step is located.

The Packages in Error field indicates any routing errors that must be resolved.

**NOTIFY TAB** | The Notify tab allows you to configure the templates for each type of notification recipient. This feature can be enabled or disabled by choosing the email template from the dropdown. If no email template is chosen, that notification will be disabled. You can specify a template for the actor, originator, refer, refer, and return the response for each actor.

The Originator Email Template provides a notification email to the originator if necessary. When a user originates a form, the email notifications the user receives will include a link to the workflow package.

An external/dynamic email recipient can be configured. When configuring an external/dynamic recipient, the user can pick a field on a form or a Content document containing the value of the desired recipient's email address.

The recipient type for external/dynamic recipients can be changed so you can specify a static email address instead of using a field from the form/document.

Refer to the Appendix for additional information and a list of the base Email templates and sample body text.

The screenshot shows the 'Group Actor Configuration' window with the 'Notify' tab selected. The 'Flow Recipient' section contains five dropdown menus: 'Actor Template' (Currently Disabled: Select to Enable), 'Originator Template' (Currently Disabled: Select to Enable), 'Refer Template' (ReceiptNotification), 'Refer Response Template' (ReceiptNotification), and 'Return Template' (ReceiptNotification). The 'External Recipient' section has a table with columns: 'Add/Remove', 'Recipient Type', 'Email Address', and 'Email Template'. There is a '+ -' button and a 'Choose One...' dropdown in the 'Recipient Type' column. The 'Email Address' column has a text input 'Enter Email Address of Recipi...'. The 'Email Template' column has a 'Choose One...' dropdown. 'SAVE' and 'CANCEL' buttons are at the bottom right.

FIGURE 7.1 Workflow Designer | Group Actor Configuration | Notify Tab

**FILTER BY TAB** | It references a user's Custom Properties within Etrieve Security and, when configured, delivers a package only to Group members who share the same Custom Property value. This workflow example does not utilize this feature.

The screenshot shows the 'Group Actor Configuration' window with the 'Filter By' tab selected. It features a toggle switch labeled 'Enable Filter By' which is currently turned off. 'SAVE' and 'CANCEL' buttons are at the bottom right.

FIGURE 7.2 Workflow Designer | Group Actor Configuration | Filter By

**REMINDERS TAB** | The Reminders tab contains a setting called “Enable Reminder Notifications,” a toggle switch to turn on/off reminders at this step. If reminders are set to Off, any pending Reminder Notifications that are supposed to be sent out for the step will not go out. However, when enabled, pending Reminder Notifications for the step will be checked again at the top of the hour, as usual, and if any of the notification dates have passed the current date and time, then notification emails will be generated and sent out.

The screenshot shows the 'Broadcast Actor Configuration' window with the 'Reminders' tab selected. It displays the text 'Step Level Reminders are currently disabled' and a toggle switch for 'Enable Reminder Notifications' which is currently turned on. 'SAVE' and 'CANCEL' buttons are at the bottom right.

FIGURE 7.3 Workflow Designer | Broadcast Actor Configuration | Reminders Tab

**ACTIVE PACKAGES TAB** | The Active Packages tab displays all the Active Packages for the Workflow step. Users can search for a specific package by typing in the Search bar or selecting the Filter By drop-down selection. The filter can be applied to search for All, Locked, and Unlocked packages.

**Broadcast Actor Configuration**

Properties Integration Reminders **Active Packages** User Directed Routing

Active Packages

Search

Filter By: All

Certified Contract of Employment   Currently assigned to	UNLOCKED
Certified Contract of Employment   Currently assigned to	UNLOCKED

SAVE CANCEL

**FIGURE 7.4** Workflow Designer | Broadcast Actor Configuration | Active Packages Tab

**USER DIRECTED ROUTING TAB** | The User Directed Routing tab is in the Broadcast Actor settings. This enables users to specify which users within a group should receive a package rather than routing it to an entire group. It is configured on the actor that will be choosing the recipient. Any group the actor is connected to can be selected for User Directed Routing. This workflow example does not utilize this feature.

**Broadcast Actor Configuration**

Properties Integration Reminders Active Packages **User Directed Routing**

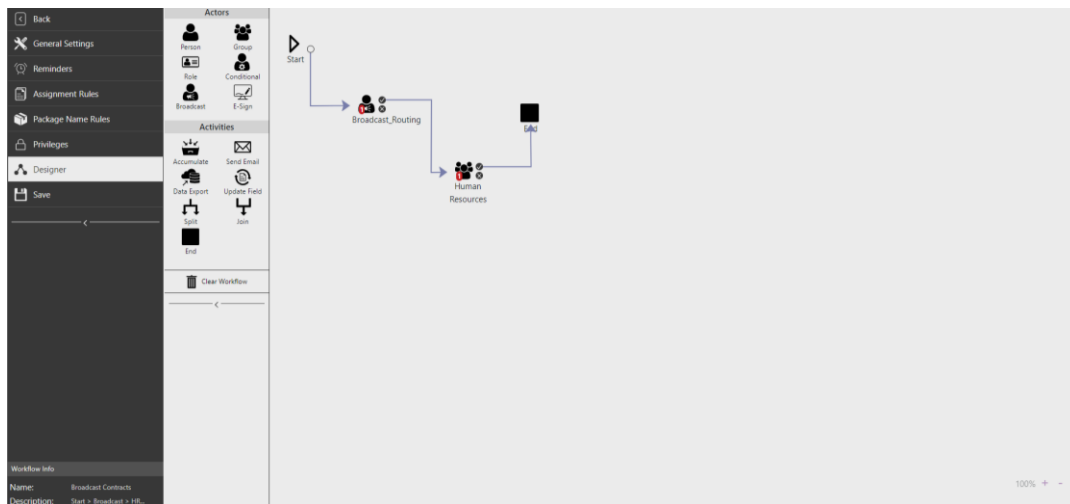
Enable User Directed Routing ☐

SAVE CANCEL

**FIGURE 7.5** Workflow Designer | Broadcast Actor Configuration | User Directed Routing

### 7.1.1 Broadcast Actor

In this workflow scenario, the broadcast actor was configured to route Contracts to a group of people. Once the contract has been completed, it will be routed to Human Resources. The Human Resources step in the illustration below has been configured using a Group Actor. When setting up a Broadcast Actor in a Workflow, this actor configuration must be the first step configured following the start of the Workflow.



**TIP:** The Badge number displayed over the Workflow step indicates the number of active packages that are in the Workflow step. (User's Central Inbox for action)

FIGURE 7.6 Workflow Designer | Broadcast Contracts

## 1 Broadcast Actor Configuration

**BROADCAST ACTOR** | A broadcast actor typically allows the representation of steps so broadcast routing can occur at the first step of a Workflow. Broadcast routing can be incorporated into a business flow, which enables the Broadcast to preview actions for the originator and approve and deny actions for the recipients of the broadcasted form. Senders of broadcast forms commonly use this actor in Workflows that manage Contracts and Policy Changes. This will result in fewer users to filter from, fewer irrelevant filters to manage, and the pre-population of automatically available data.

FIGURE 7.7 Workflow Designer | Broadcast Actor Configuration | Properties Tab

**INTEGRATION TAB** | The integration source will be configured in the integration tab. The source must be created before the integration mapping can be configured. The Person ID must be 'Email' on all broadcast routing configurations.

FIGURE 7.8 Workflow Designer | Broadcast Actor Configuration | Integration Tab

## 2 Group Actor Configuration

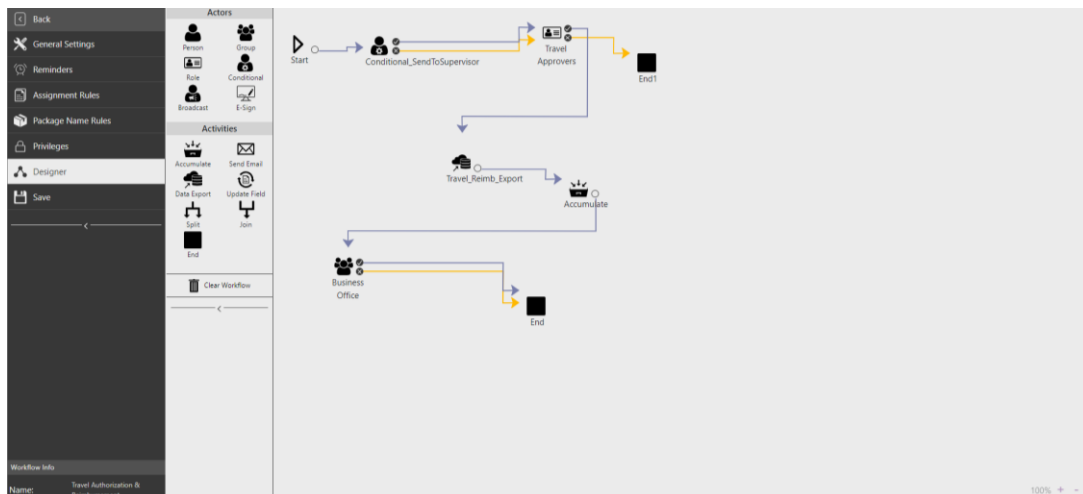
**GROUP** | All users of the chosen group will receive the package in their Etrieve Central Inbox.

The screenshot shows the 'Group Actor Configuration' window with the 'Properties' tab selected. The 'Group' dropdown is set to 'Business Office'. The 'Step Name' is 'Business Office' and the 'Step Code' is 'BusinessOffice' with an 'EDIT' button. Three toggle switches are turned on: 'Enforce Package Review', 'Enable Refer', and 'Enable Return to Previous'. The 'Location (x, y)' is set to '100' and '329'. There is a 'REPROCESS' button for 'Packages in Error: 0'. At the bottom right are 'SAVE' and 'CANCEL' buttons.

**FIGURE 7.9** Workflow Designer | Group Actor Configuration | Properties Tab

### 7.1.2 Conditional Actor, Role Actor, Data Export Activity, Accumulate Activity

In this typical Travel Authorization and Reimbursement Workflow Scenario, a Conditional Actor has been configured to send the form to the originator's supervisor based on a green-flagged field on the form. After the supervisor processes it, the form continues to the travel approvers. If the request is denied, then the Workflow will end. If the request is approved, the green-flagged fields on the form are exported to a table, and the form is accumulated with a Travel Reimbursement Form, which is then sent to the Business Office for processing.



**FIGURE 7.10** Workflow Designer | Travel Authorization and Reimbursements

#### 1 Conditional Actor Configuration – Send to Supervisor

**CONDITIONAL ACTOR** | A single user will receive the package, although the user to receive the package is “conditional” based on form values and integration (the recipient can differ from package to package).

**INTEGRATION TAB** | The integration source will be configured in the integration tab. The source must be created before the integration mapping can be configured. The Fields key is a drop-down list of fields specified as input from Etrieve Forms earlier in the configuration. The Actor Type allows you to choose whether the Conditional Actor is looking for a Person, Group, or Role. The Default Actor is the actor that will receive the form should the query return null.

**Conditional Actor Configuration**

Properties Notify **Integration** Reminders Active Packages User Directed Routing

Integration Mapping: Conditional\_SendToSupervisor

Fields: x superUsername x

Actor Type: Person

Default Actor: Terri McKinney x

SAVE CANCEL

**FIGURE 7.11** Workflow Designer | Conditional Actor Configuration | Integration Tab

## 2 Data Export Activity Configuration

**DATA-EXPORT** | This activity can export data from a form to an integrated table. This process is often used for reporting. The type of table integration will need to be configured, and the desired form inputs will have to be marked as “key fields” for the data-export activity to write form input values to the designated table. Each new form that passes through this activity in a Workflow will write a new row for this table – all green-flagged key field values will be exported to the table as columns in specific form rows. The IDs of the fields must match the column names.

**PROPERTIES TAB** | The Properties tab for the Data Export Activity Configuration provides a drop-down list to choose which item will be exported if there is an accumulation activity in your Workflow. The Integration Mapping allows you to select the pre-configured integration source.

**Data Export Activity Configuration**

**Properties**

Item: Travel Reimbursement

Integration Mapping: Travel\_Reimb\_Export

Location (x, y): 289 184

Packages in Error: 0 REPROCESS

SAVE CANCEL

**FIGURE 7.12** Workflow Designer | Data Export Configuration | Properties Tab

## 3 Accumulate Activity Configuration

**ACCUMULATE** | This activity is used to “accumulate” multiple packages to be combined and routed as a single package once the accumulation parameters are satisfied. Once all forms are accumulated, the new form package containing all completed forms will be routed to the next actor/activity.

**CRITERIA TAB** | You must select a shared key field between all documents. You can then specify how much of each document should be accumulated to be considered complete. The documents must be associated with the Configuration Setting for Assignment Rules.

**Accumulate Activity Configuration**

Properties **Criteria** Package Name Accumulation Type

Group by shared keyfield: travelNumber

Add/Remove		Items	Number to Accumulate
+ -	And	Travel Reimbursement	1
+ -	And	Travel Authorization	1

SAVE CANCEL

FIGURE 7.13 Workflow Designer | Accumulate Activity Configuration | Criteria Tab

**ACCUMULATION TYPE TAB** | The Accumulation Behavior type tab provides a drop-down list of options to allow the user to select the behavior that best describes the action that will be taken regarding the Package being created. When designing a workflow with only one form/document, the system allows the accumulation of activity configurations grouped by the key fields available in a single form by using the key fields associated with the form. Accumulation behavior can be configured for new packages, Added to existing packages, or Dropped if not needed.

**Accumulate Activity Configuration**

Properties Criteria Package Name **Accumulation Type**

Accumulation Behavior Type: New Package

Choose One...  
New Package  
Add to existing  
Drop if not needed

SAVE CANCEL

FIGURE 7.14 Workflow Designer | Accumulate Activity Configuration | Accumulation Behavior Type Tab

**NOTE** | If the Item Type Name is part of the naming options for the Package Name Rules, Accumulate will use the Workflow Name if Default is selected on Accumulate and a custom name is selected for the Package Name Rules. When Package Name Rules do not contain an Item Type Name as part of the naming options when a customized name is set, Accumulate will use what is defined on Package Name Rules when the default option is selected for that step.

#### 4 Group Actor Configuration

**GROUP** | All users of the chosen group will receive the package.

### 7.1.3 Update Field Activity

In this Workflow scenario, a Direct Deposit Authorization document is scanned into Etrieve Content and routed to the Payroll group for approval. The Update Field activity updates the applicable document type's key fields as the route is processed. If the Payroll group approves the Direct Deposit Authorization, then the key field of Status is set to "Reviewed," and the Workflow ends. If the Direct Deposit Authorization is denied, the key field of Status is set to "Incomplete" and routed back to the Payroll Group for further processing.

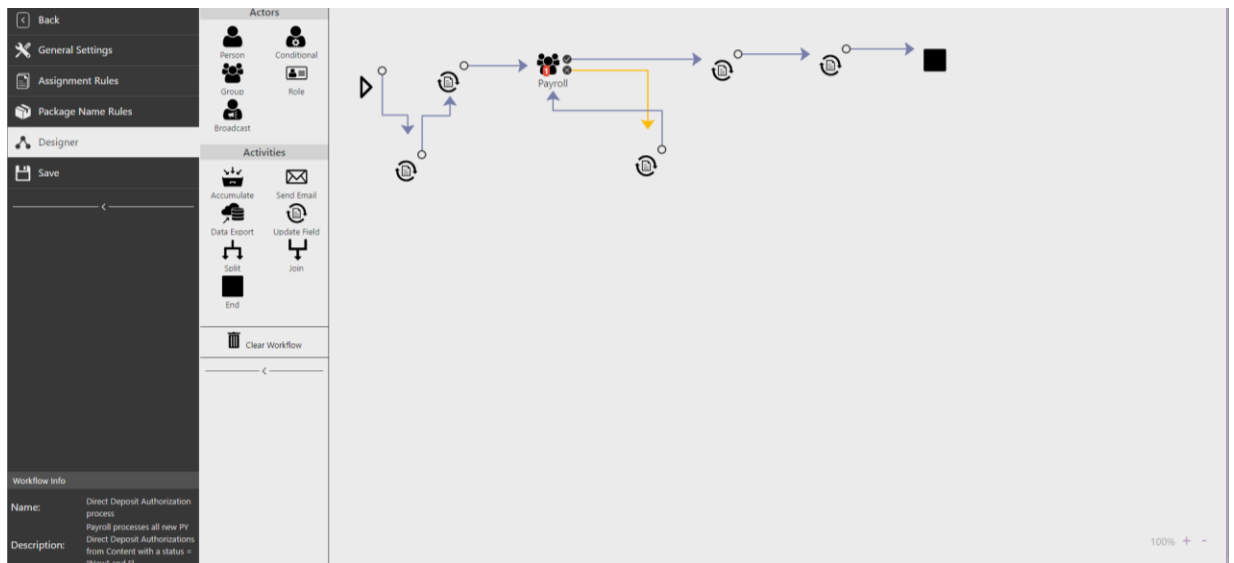


FIGURE 7.15 Workflow Designer | Direct Deposit Authorization Process

### 1 Update Content Field Activity Configuration

**UPDATE FIELD** | Used in routing Content documents only, which updates a specified field value.

**PROPERTIES TAB** | The Update Content Field Activity Configuration Properties tab provides a drop-down list to select which item should be updated from the list of assigned document types. Next, the key field within the specified item should be chosen to make appropriate updates. The Key field is updated with the data provided in the New Value field.

FIGURE 7.16 Workflow Designer | Update Content Field Activity | Properties Tab

### 7.1.4 Join and Split– Illustration of Best Practice

In this Workflow configuration scenario, the Split Activity is configured to split the package and route it to two different groups: the Business Office and Human Resources. Once each group has approved the packages, the Join Activity is configured to combine the previously split packages and send them to the group Human Resources Supervisor. Once approved, the process ends.



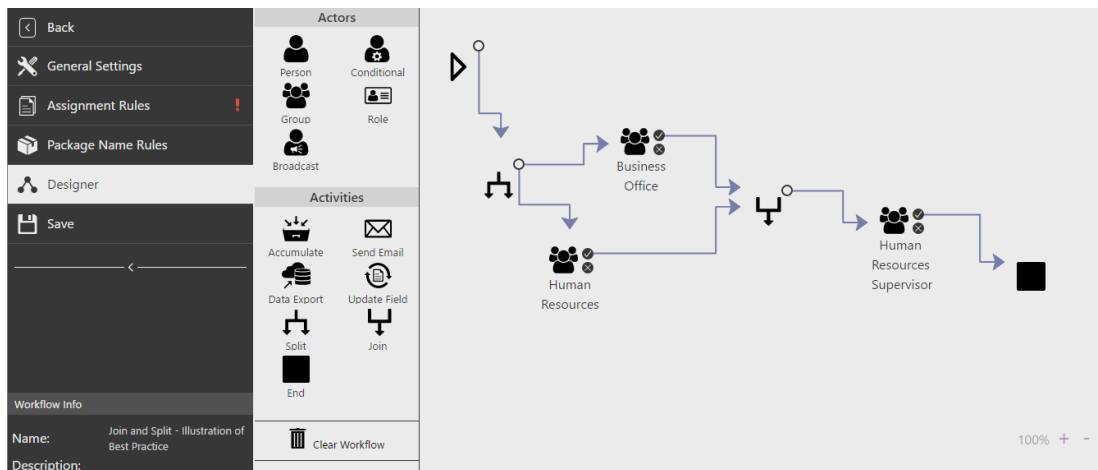


FIGURE 7.17 Workflow Designer | Join and Split – Illustration of Best Practice

### 1 Split Activity Configuration

**SPLIT** | This activity duplicates the package, allowing it to be routed to multiple actors/activities simultaneously.

### 2 Join Activity Configuration

**JOIN** | This activity combines packages previously split into one package. For routing to execute successfully, the number of packages must equal the number routed into the Join.

## 7.1.5 Join and Split – Illustration of a Join and Split that will not Execute

In this Workflow configuration scenario, the Group step for Human Resources has an alternate end path, and the Join Activity step does not equal the number of packages split into separate packages. If Human Resources denies the package, the package approved by the Business Office will be held in the Join Activity, resulting in a Workflow that will not execute.

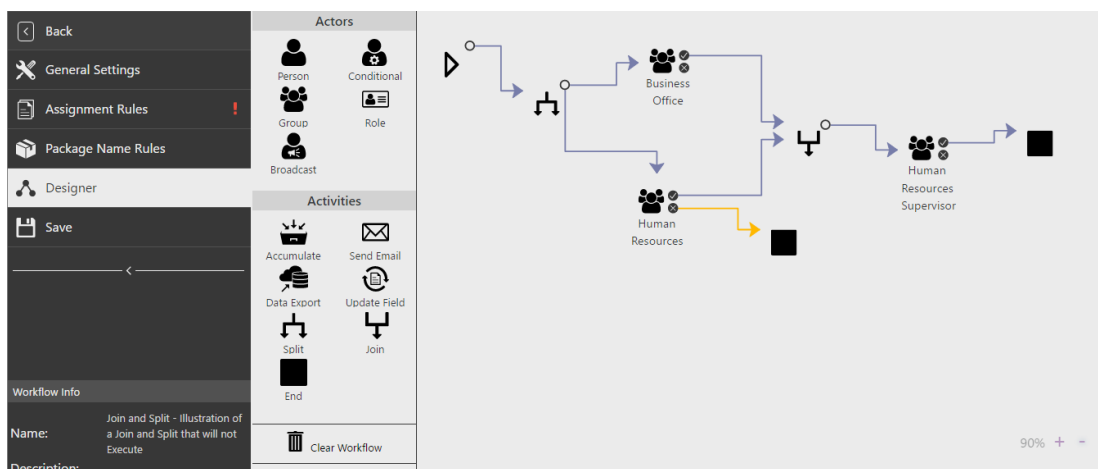


FIGURE 7.18 Workflow Designer | Join and Split – Illustration of a Join and Split that will not Execute

## 7.1.6 Actor Filtering, UDR, Navigation Rules Determined by Groups or Roles

In this Workflow scenario, an employee originates a Leave Request Form and sends it to their specific supervisor by utilizing the 'Filter By' setting on the Supervisors Group Actor. The supervisor reviews the package and either denies or approves the request for the Human Resources group. Human Resources chooses a member of the Directors Group to send the package to by utilizing User-Directed Routing.

If the originator of the Leave Request belongs to the Supervisors group, then the package will bypass that Group and route directly to the Human Resources Group for approval. This is achieved by using Navigation Rules and filtering determined by Etrieve Security Group membership.

If a package is routed to a specific member of a group using User-Directed Routing and acted on by them, it will be listed only in that member's activity. The activity of the other group members will not indicate that the package was acted upon.

**NOTE** | User-directed routing and Actor Filtering cannot be used at the same step to determine the next step in a given workflow.

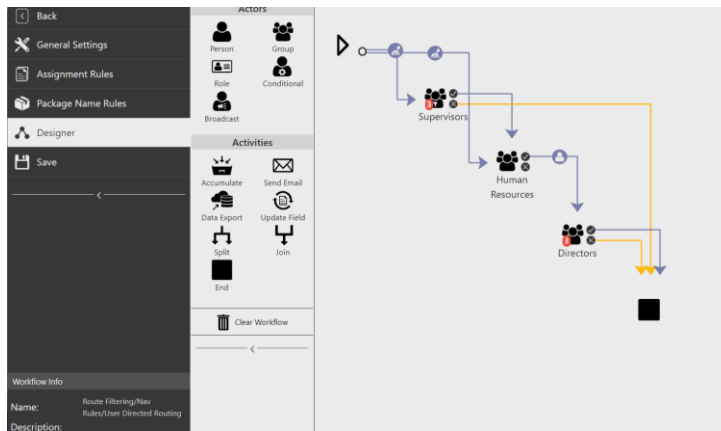


FIGURE 7.19 Workflow Designer | Leave Request

#### 1 Filter By Configuration – Filter Supervisors Group Actor

**FILTER BY** | The Filter By tab is in the actor settings. It is used to reference a user's Custom Properties within Etrieve Security and will deliver a package only to Group members who share the same Custom Property value.

**CONFIGURATION** | In this workflow example, we leverage this feature to deliver the originator's leave request to the proper Supervisors Etrieve Security Group member automatically based on a "Location" Custom Property previously configured in Etrieve Security.

This functionality is enabled on the Filter By Tab of the Group Actor's configuration by moving the Enable Filter By slider to the right. To set up a filter, select a previous step and a user attribute to filter by. In this workflow, the previous step is the Start Activity, and the attribute is the "Location" Custom Property. Once this is configured, only members of the Supervisors Group who share the same "Location" Custom Property value as the originator will receive the Leave Request.

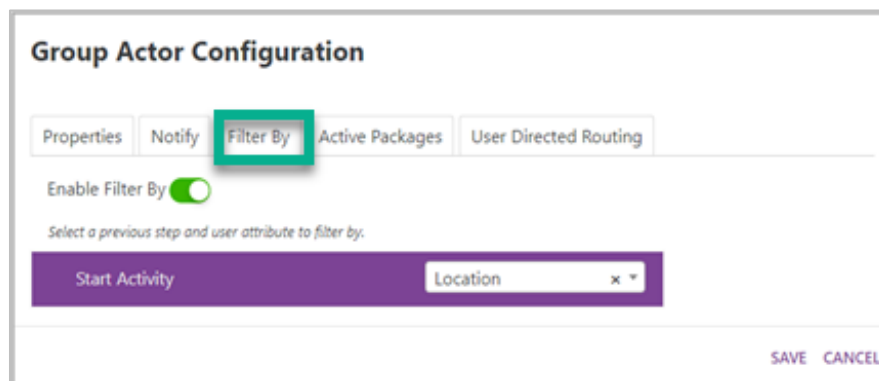


FIGURE 7.20 Workflow Designer | Group Actor Configuration | Filter By

The Actor icon will change if Filter By is enabled on the actor.

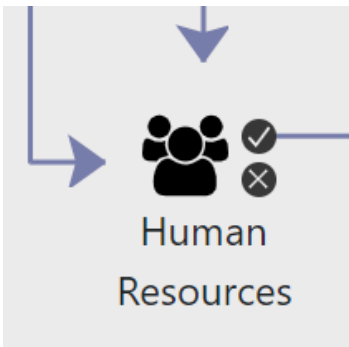


FIGURE 7.21 a Filter By disabled

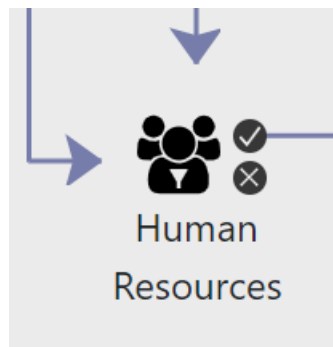


FIGURE 7.21 b Filter By enabled

If the Originator has multiple values for the Location Custom Property, they will be prompted to Select Submission Data on Submit. Designating the correct option from the drop-down menu will assist in creating simpler workflows.

FIGURE 7.22 Etrieve Central Viewer | Select Submission Data

## 2 User Directed Routing Configuration – Send to a specific member of the Directors Group

**CONFIGURATION** | In this workflow example, User Directed Routing will be configured to allow a member of the Human Resources Group to choose which member of the Directors Group to route the package to.

**USER-DIRECTED ROUTING** | The User-Directed Routing tab is in the Group Actor settings. It enables users to specify which users within a group should receive a package rather than routing it to an entire group. It is configured by the actor who will be choosing the recipient. Any group the actor connects to can be selected for User-Directed Routing.

To enable this functionality, select the Human Resources Group actor and click the Settings Cog. Then, select the User Directed Routing tab and move the slider to the right to enable it. Finally, select the Directors Group and save.

FIGURE 7.23 Workflow Designer | Group Actor Configuration | User Directed Routing

When user directed routing is enabled, the Connector will indicate with a small user icon.

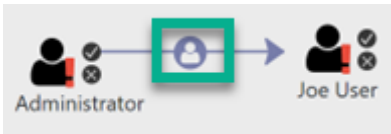


FIGURE 7.24 User Directed Routing Indicator

Now, the user who receives this package in their Inbox from a member of the Human Resources Group will be able to choose which member of the Directors Group the Package will be sent to for approval (Approve To Icon).

FIGURE 7.25 Etrieve Central Viewer | User Directed Routing

### 3 Navigation Rule Configuration – Send to Supervisor or Human Resources

**NAVIGATION RULE** | Navigation Rules route a package based on certain configured criteria. Rules can be set by Connectors based on Key Fields or Actor Attributes.

**CONFIGURATION** | select the Connector pointing towards the Human Resources actor and click the Settings Cog to enable this functionality. To reference the Originator's Etrieve Security Group Membership, select Actor Attributes from the Type drop-down and Groups from the Key field/Attribute drop-down. Select Contain from the Operator drop-down and choose the Supervisors from the list of Etrieve Security Groups from the Value drop-down.

FIGURE 7.26 Workflow Designer | Navigation Rule Configuration

A Navigation Rule with the operator 'Does Not Contain' must also be set up on the Connector pointing to the Supervisors Group.

FIGURE 7.27 Workflow Designer | Navigation Rule Configuration

Select Save once the configuration is finished, and the workflow will be complete.

### 7.1.7 Block UDR by the Originator for Anonymous Forms

In Central for Flow, workflows with anonymous Forms will block the Anonymous User from seeing the user listing when User Directed Routing is enabled for the Start step of a Workflow. This ensures that an anonymous user can only submit and not indicate to whom the form will be routed. It is recommended not to have UDR enabled when the Workflow is associated with an Anonymous Form unless the intent is to route the package to all immediate steps that route from the Start Step.

### 7.1.8 E-Sign Actor within a Workflow

E-Sign workflows are used when an external user needs to sign an Etrieve Form electronically. The form will need to include:

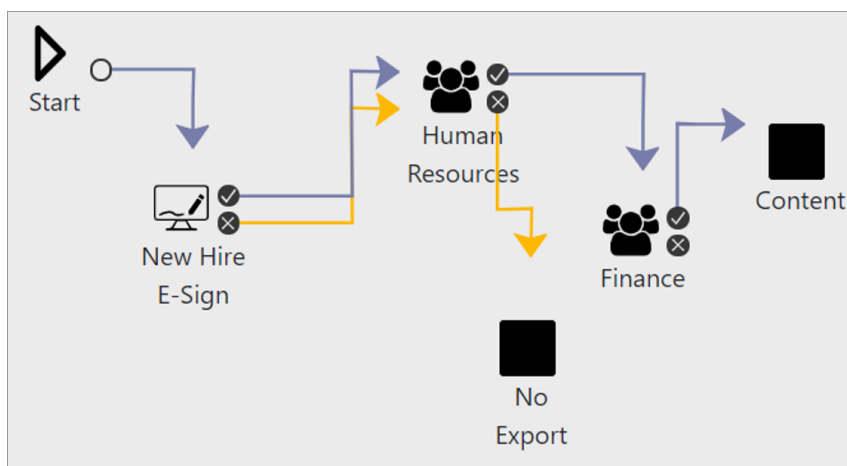
- ▶ designated fields for the Signer Recipient email address and at least one signature field.
- ▶ a validation for the email field ensures a valid email address is entered.

Before a Form enters the first E-Sign step to be signed (i.e., before any signatures are obtained), the E-Sign functionality will allow all fields to be editable (including designated email and signature fields). Only the dedicated signature fields will be editable once the form reaches the E-Sign step(s). After a signature has been obtained, the second E-Sign step will only allow the signature fields for that step to be modified, and non-E-sign steps that the forms are routed to after the first signature is obtained will not allow any field to be modified. Any actor steps that follow an E-Sign step (after signatures have been obtained) will not be allowed to modify the signed form.

E-Sign can be configured in parallel (if signatures need to be obtained from multiple Signer Recipients simultaneously) or in series (where signatures can be obtained in a certain order). When using multiple E-Sign steps in parallel, the Form is split and sent to all E-Sign steps that is a part of the parallel routes. A Join activity will be needed if E-Sign is used in parallel.

**NOTE** | If there are overlaps of the same fields amongst the E-Sign steps, then only the data entered by the first person who updates and signs the Form will be stored. It is recommended not to use the same fields across E-Sign steps.

Some common uses for an E-Sign workflow are obtaining signatures from new hires before they are provided with an internal account. In this case, an HR representative would start the form and then route it to the new hire's public email address.



**FIGURE 7.28** Workflow Designer | E-Sign HR Workflow for a New Hire Student Start

A dual enrollment workflow can utilize E-Sign to obtain signatures from the High School and/or Parent. The form would be started by the Student, routed to the High School Principal and Parent, and sent back to be reviewed by Dual Enrollment.

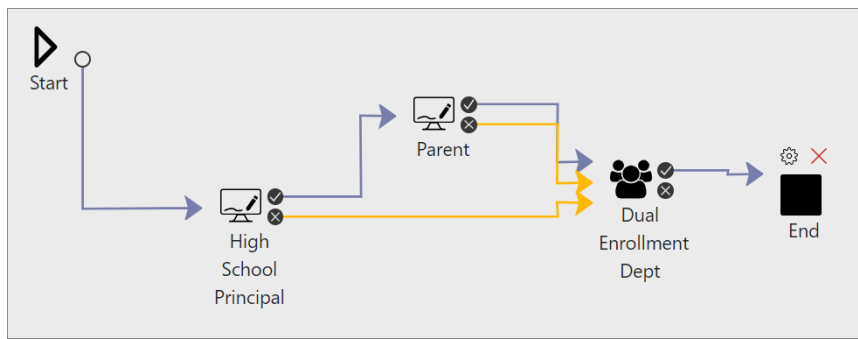


FIGURE 7.29 Workflow Designer | E-Sign Dual Enrollment

Also, an E-Sign workflow can be configured when signatures need to be obtained from a student's Parent or guardian. For this example, the form is started by the Student and routed to the Parent(s) to obtain signatures.

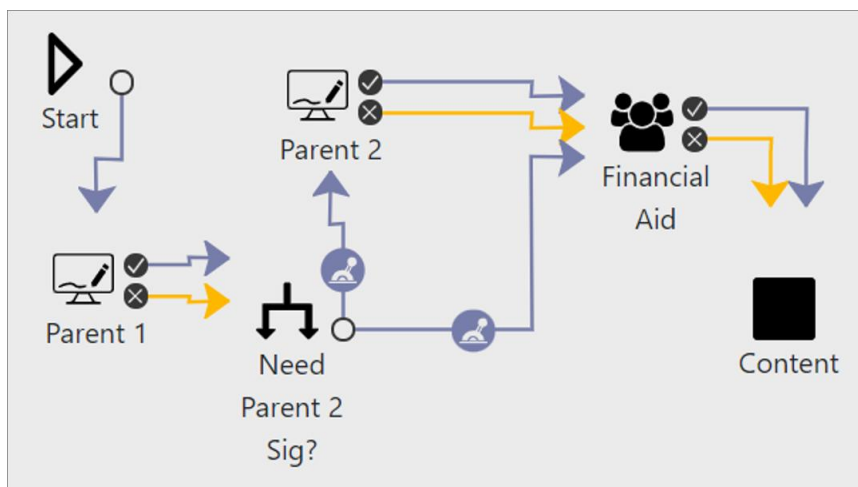


FIGURE 7.30 Workflow Designer | E-Sign Financial Aid Form by Started Student