**WUIN-920 - Work Flow related changes on Work Flow screen**

**Requirements:**

1. Final Sign Off currently sets the Payment and Portal Flags but we need to change the logic for this: 🡪 3h - DONE

* Payments flags should also consider whether the payment module is enabled when setting the flags the flags should only be set if the Payment Module is enabled

select \* from warse.registry where reg\_key = 'PAYMENTS\_ENABLED'

* Portal flags should also consider whether the Portal is enabled when setting the portal flags along with the new SEND\_TO\_PORTAL flag against the contract.

select \* from warse.registry where reg\_key = 'PORTAL\_METADATA\_ENABLED'

Only if the Portal is and the SEND\_TO\_PORTAL flag is set to Y should the STATEMENT\_UPLOAD and ANALYTICS\_UPLOAD flags be set.

2. When a statement is moved to Archive Requested the portal and Payment flags are currently not updated (They are only set when a statement is moved to final sign off) this needs to be changed so that the Portal/payment flags are set using the same logic as above when the user sets the royaltor activity status to Archive Requested.The actual archive shouldn’t start until the unless the Payment/Portal flags are set to complete where applicable - This logic is already present in the archive package 🡪 2h - DONE

3. The screen should allow Bulk changes . i.e we need to provide a radio button under the header (Under review, Team sign off, Manager sign off, Final sign off and archive ) so that users should be able to select all the searched rows and sign off at a go. 🡪 12h – IN PROG

***Validations:***

1. *There are 2 different statuses for royaltors but selected owner status is different. Owner status can’t be changed 🡪 No*
2. *There are more than 2 diffetent statuses for royaltors 🡪 No*
3. *When a royaltor is in final sign off and tried to change owner to under review/team sign off/mngr sign off 🡪 Yes. Confirmation message and if selected to proceed, update all other than final sign off to the selected status*
4. *Status updating only to next level 🡪 No*
5. *Editor user validations 🡪 Yes*

*Editor User can't change the status of a statement from Manager Sign off/Final Sign off/Archive back to Team Sign off/Under Review*

status change not firing when selected same status after selecing No form the confirmation – TO DO

4. Recouped/Non Recouped Threshold filters should be removed and replaced by filters on closing balance and Earnings. This filters should have the ability for the users to specify =, <=, >= operations when inputting a number. 🡪 8h – DONE

* Field validations – DONE

5. Need to have the ability to hide the team and Manager sign off options on the screen this should be a Registry setting and be flexible to hide both or 1 of Team/Manager Sign off in the screen. This will allow the system to be flexible for smaller teams. 🡪 12h – DONE

6. Notes on the workflow screen need to be more flexible they should have the same formatting capabilities as the Royaltor notes section in the contract screen. They would also like the ability to attach documents to the Notes for a given royaltor activity row. 🡪 8h - DONE

It would be nice to have an attachment section where they can upload and download/view attached documents along with the comment/notes box. 🡪 4h – IN PROG

popup height issue after upload – TO DO

8. Remove Schedule Archive button and its corresponding functionality from Work flow screen and implement this logic in Archive Statement in Statement Process screen. 🡪 2h – DONE

the archive itself should not update the registry setting for Archive Enabled once it is complete. This is an unnecessary step which just adds an extra click…

a. select \* from warse.registry where reg\_key = 'ARCHIVE\_ENABLED' scheduled button on workflow

Change needed in the screen and also in the Archive package