

etrieve™ | FLOW

Etrieve Flow Administrator Guide

VERSION 1.7



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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 that allows institutions to automate both 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 of any type using Etrieve Flow is simple and intuitive with drag and drop functionality within the Workflow designer. There are no complex computer languages to learn. The interface is welcoming, 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 instruction on how to use the Workflow designer. It will also give you an administrative understanding of Etrieve Flow.

1.2 Logging into Etrieve Flow and Page Layout

Before logging into Etrieve Flow, a user must first open a web browser and navigate to the Etrieve Central website address.

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

- ▶ Header (top bar)
- ▶ Primary Navigation Panel (always displayed, left side of screen)
- ▶ Alternate Navigation Panel (display toggled on/off, right side of screen)
- ▶ Flow/Forms/Group Settings

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

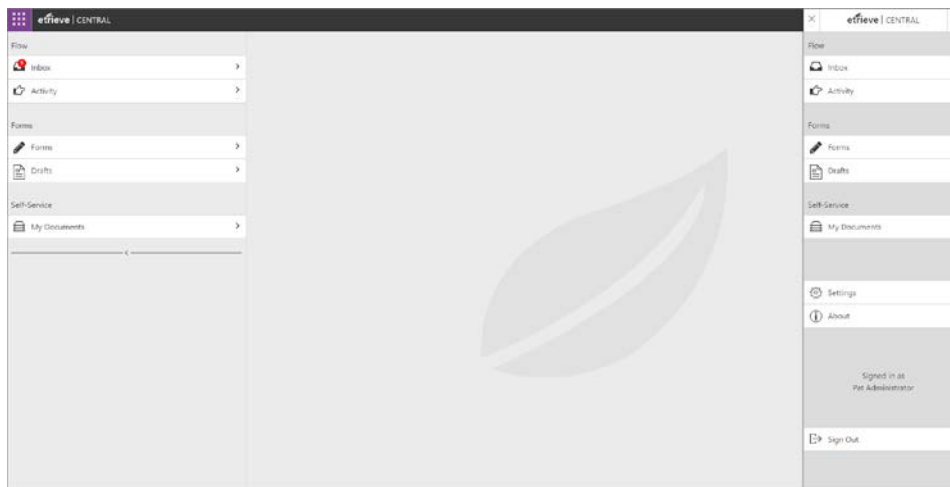


FIGURE 1 Etrieve Central Page Layout

1.3 Central Page Layout

To perform any function within Etrieve, users must navigate to the appropriate section of the Navigation Panel. The primary Navigation Panel is located on the left portion of the home page and consists of two sections, Flow and Forms, with sub panels that contain available Flow and Forms options.

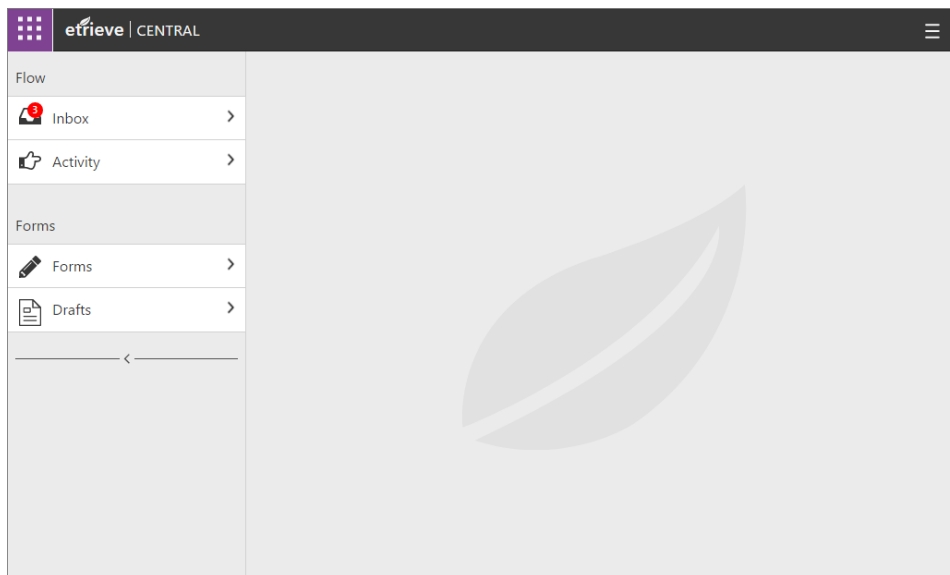


FIGURE 2 Etrieve Central Home Page

The Document Viewer displays when the user is working with items in one of the sub panels and will show for Inbox, Activity, Forms and Drafts.

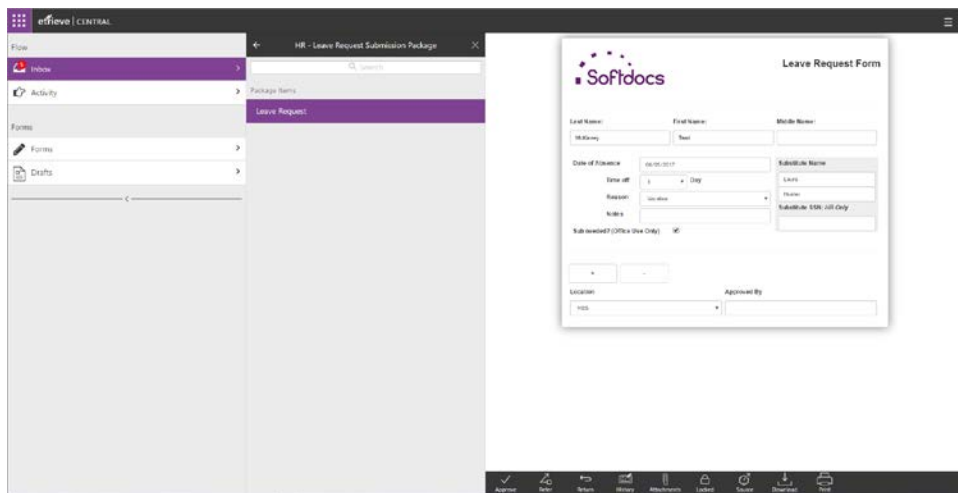


FIGURE 3 Etrieve Central Document Viewer

The Header is displayed across the top of the Etrieve Central home page. It is described in greater detail in Section 1.4. Figure 4 shows the appearance of the Etrieve Central home page when the Alternate Navigation Panel has been toggled on.

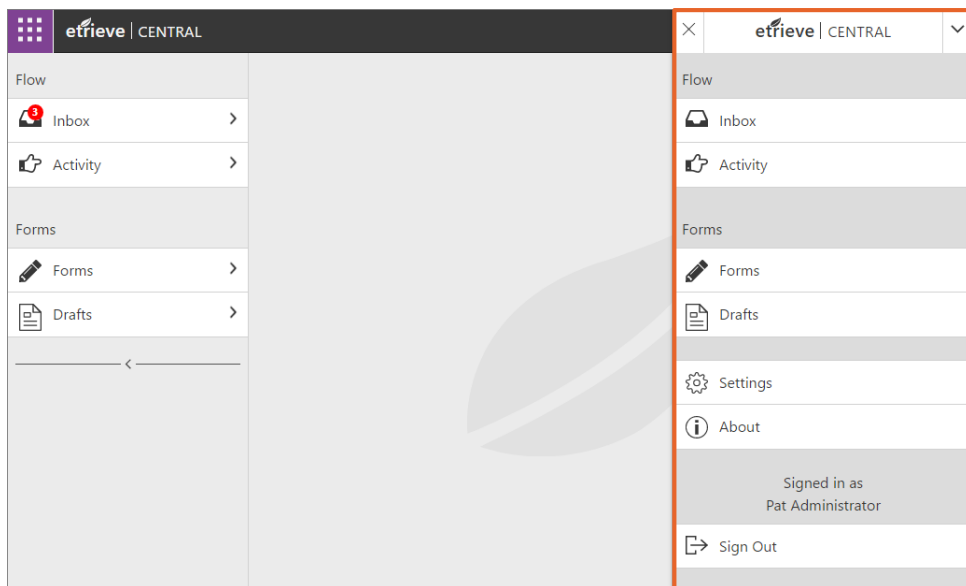


FIGURE 4 Etrieve Central Expanded Menu Options

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.

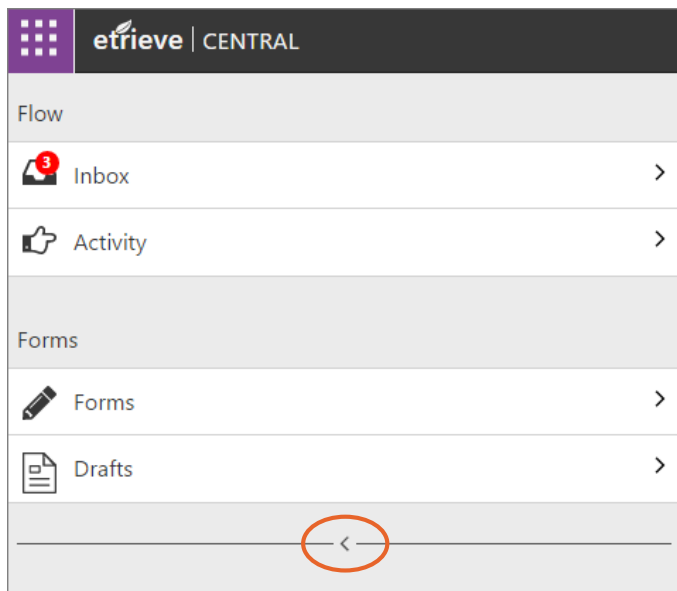


FIGURE 5 Collapse Main Navigation Panel

1.4 The Header and Navigation

The Header is the top most bar on the Central Page. It contains three sections:

- ▶ App Switcher
- ▶ Etrieve | Central (View Reset)
- ▶ Alternate Panel Toggle (Three stacked bars)



FIGURE 6 The Header

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

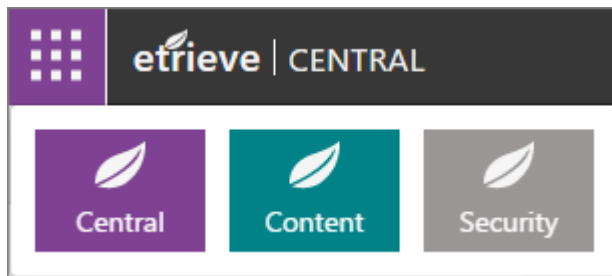


FIGURE 7 App Switcher

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



FIGURE 8 Etrieve | Central

MENU ACCESS | Clicking the three stacked bars menu icon on the right toggles on the Alternate Navigation Panel, the elements of which are described below.

The settings menu provides Central Flow and Forms settings that are configured to meet your institution's business processes, forms and Workflows.

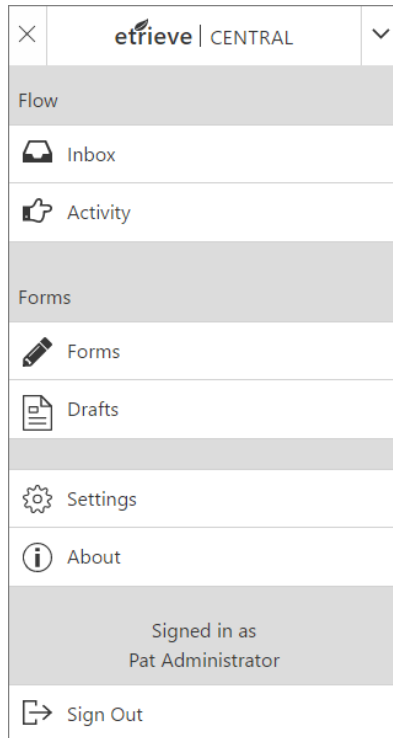


FIGURE 9 Etrieve | Central Alternate Navigation Panel

The Alternate Navigation Panel may be toggled off by clicking the X in the upper left of the Panel. Also on this Panel, the user may switch to other Etrieve Applications by clicking the down arrowhead (v) in the upper right of the Panel and selecting the desired application.

FLOW AND FORMS ACCESS | After the Alternate Navigation Panel is toggled on, if the user clicks on Inbox, Activity, Forms or Drafts, this Panel will be immediately toggled off, and the equivalent selection on the Primary Navigation Panel will be activated.

SETTINGS COG | The Settings Cog will be visible to users who have access to manage Etrieve Workflows and forms. Clicking the Cog will open the Central Settings main menu.

ABOUT | About provides details on the version of Etrieve Central that the user is accessing, as well as copyright and licensing information.

USERNAME | The username of the currently logged-in user is displayed here.

SIGN OUT | Signs out the currently logged in user.

The Document Viewer fills the available space on the right side of the Etrieve Central homepage. Users may take a variety of actions on the contents of Packages that have been routed to the Inbox by Workflows. Also, Forms to which the user has been given access may be filled and submitted in this space.

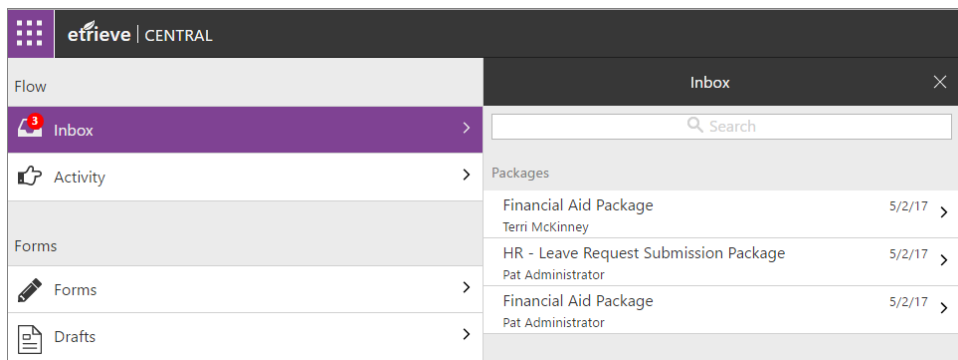


FIGURE 10 Etrieve Central Inbox Workflow Packages

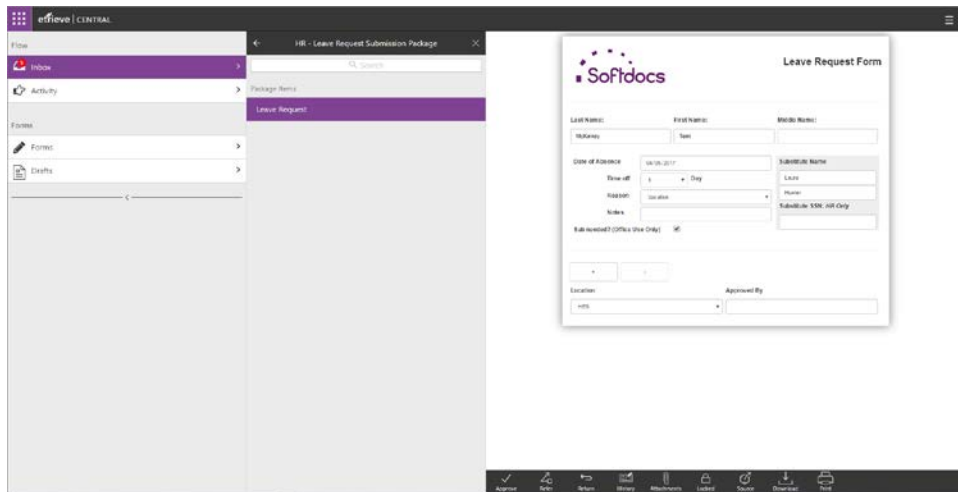


FIGURE 11 Etrieve Central Inbox - View Package and Associated Completed Form

2

Etrieve Flow Configuration

2.1 Configuration Menu

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

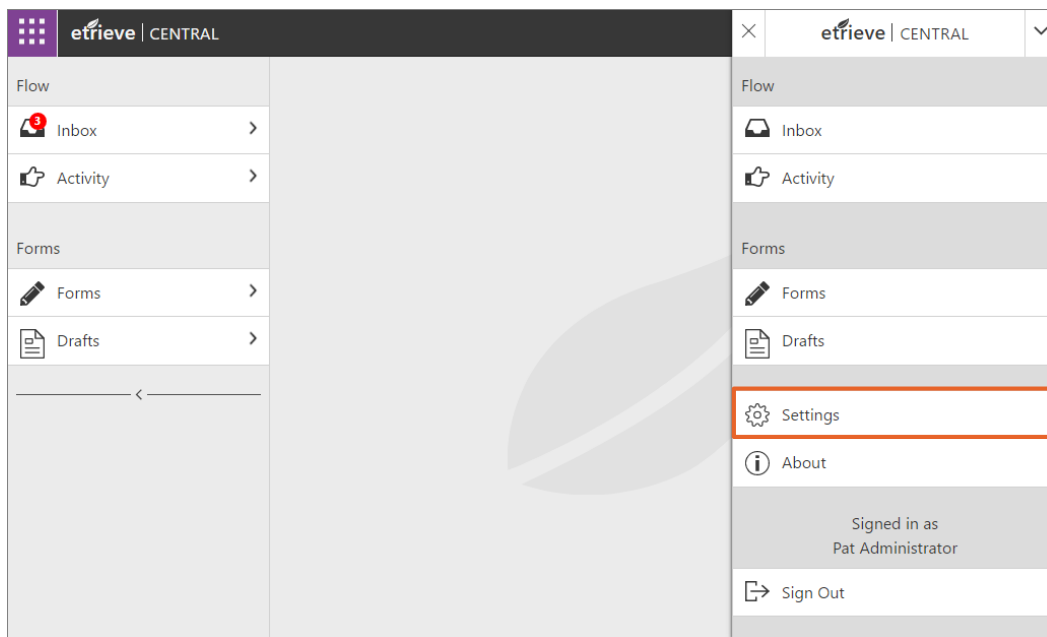


FIGURE 12 Etrieve Central Alternate Navigation Panel | Settings

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

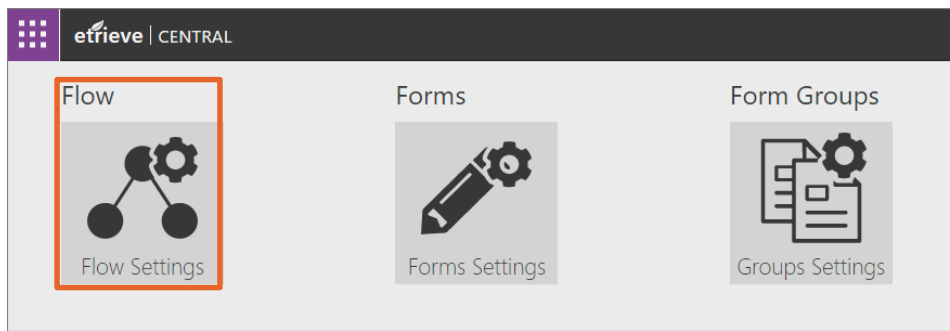


FIGURE 13 Etrieve Flow Settings

2.2 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

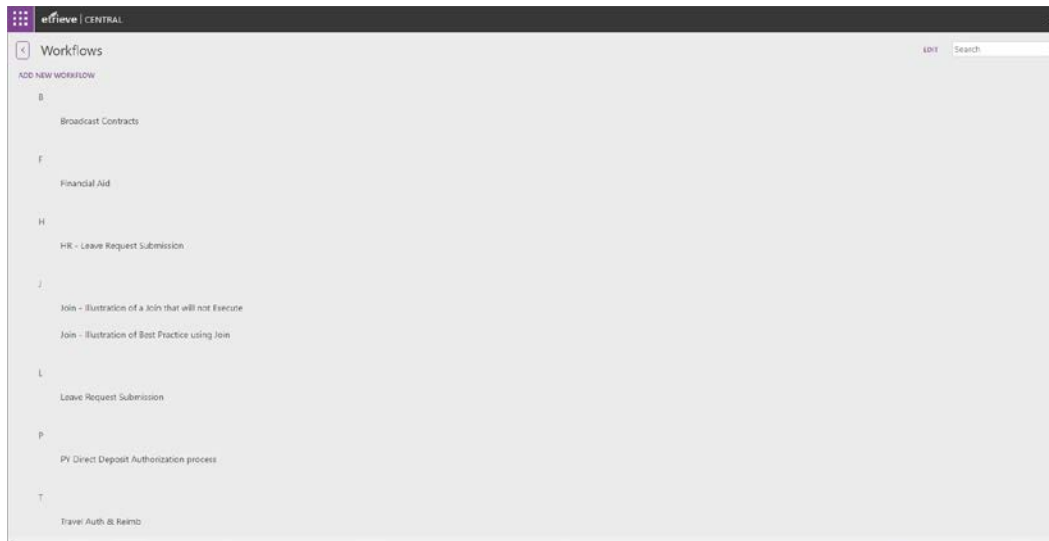


FIGURE 14 Workflow List

To add a new Workflow, select the Add New Workflow option and the Workflow Settings page will display, which will be explained in further detail in the next chapter.

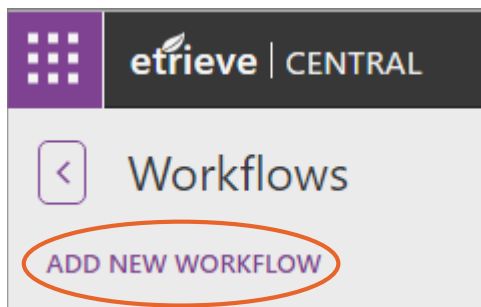


FIGURE 15 Add New Workflow

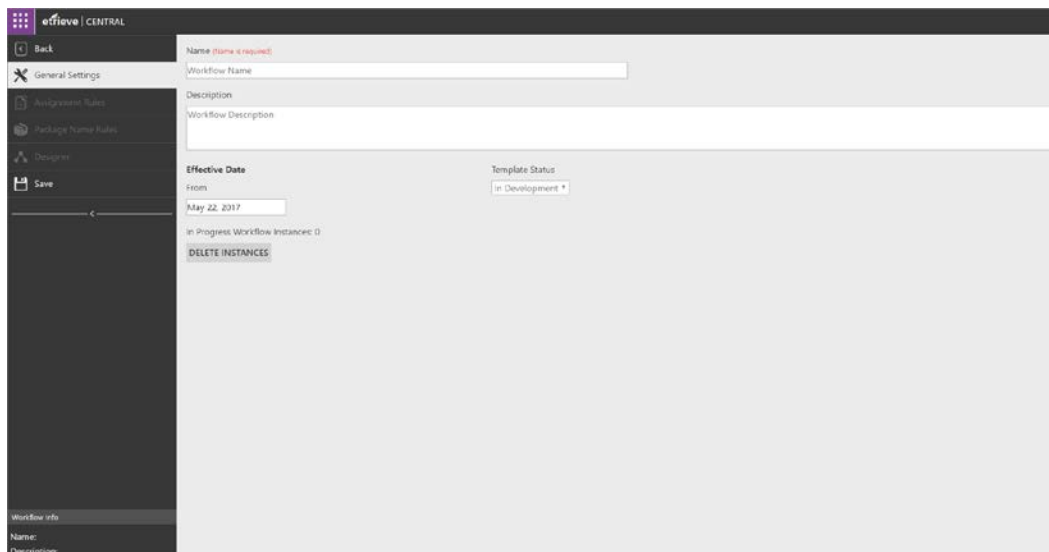


FIGURE 16 Workflow Configuration | General Settings Tab

To edit an existing Workflow, either click on 'EDIT', then click the name of the Workflow or click on the Workflow name. Either action will cause the Workflow Configuration Page to display.

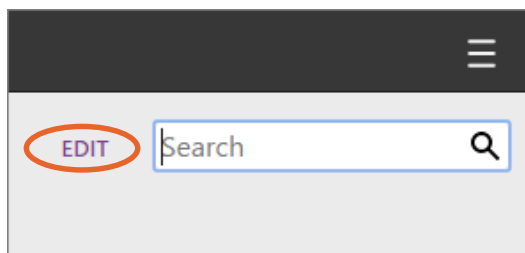


FIGURE 17 EDIT Option

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 either CONFIRM or CANCEL. Cancel will take the user back to the Workflow List.

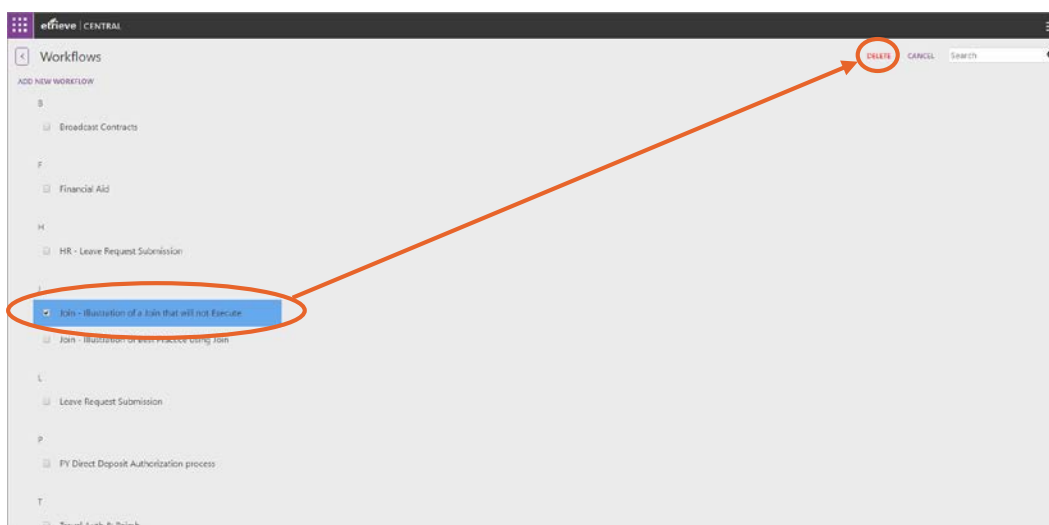


FIGURE 18 DELETE Option

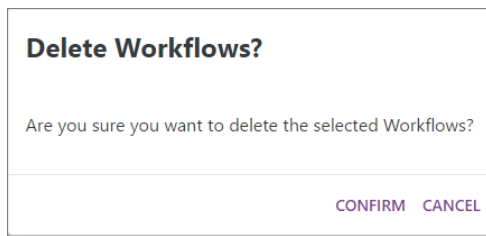


FIGURE 19 Delete Workflows Message

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

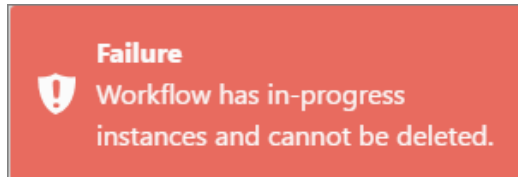


FIGURE 20 Failure Workflow Message

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 is entered.

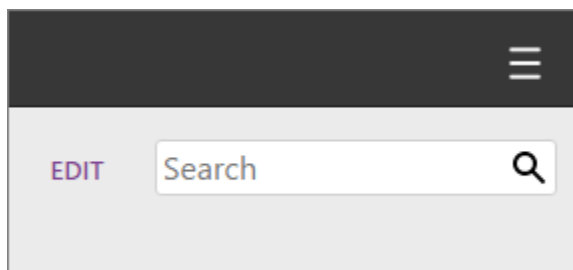


FIGURE 21 a Search Option for Existing Workflow



FIGURE 21 b Search Option with Results Filtered

3

Etrieve Flow Designer

3.1 Basics of Workflow Configuration

The process of 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 that has a direct actor-to-actor route without taking into account 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 and it is automatically routed to the appropriate department (FA or Registrar). The request will show up in the groups 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 types of admissions applications. The Workflow begins with two sets of navigation rules which evaluate the various types of applications which are 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, all of these types of applications are routed to a standard approval process for the large majority of applications. Since these types of applications do not require a transcript evaluation, their approval process is more simple.

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 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.

3.2 Workflow Configuration Using Actors, Activities and Navigation Rules

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

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

3.3 Actors Defined



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.

FIGURE 22 Flow Actors

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

GROUP | All users who are members of the chosen group will receive the package.

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 (recipient can differ from package to package).

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

BROADCAST ACTOR | A broadcast actor typically allows the representation of steps so that 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 data that is automatically available.

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.

3.4 Activities Defined

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

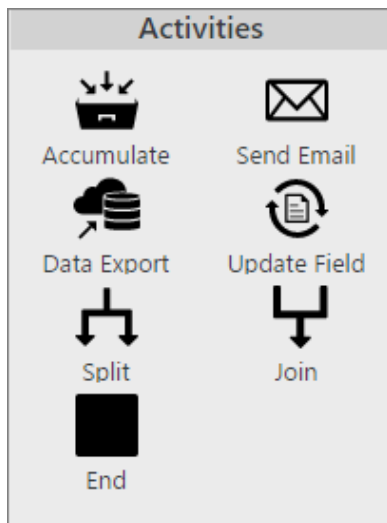


FIGURE 23 Flow Activities

ACCUMULATE | This activity is used to “accumulate” multiple items to be combined and routed as a single package once the parameters of the accumulation are satisfied. This activity is often used for the onboarding process. Example: An Accumulation Activity will be configured to accumulate the originators 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 route to the next Actor/Activity containing all of the completed onboarding forms.

SEND EMAIL | This activity will send an email to a single email address. The email template, as well as the email address of the recipient, 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 forms row. The ID's of the key fields will need to match the column names of the table.

UPDATE FIELD | Used in routing a Content document, updates a specified field value. Un-used in the routing of forms.

SPLIT | This activity is used to duplicate the package to allow the package to be routed to multiple actors/activities simultaneously. **NOTE:** This activity is not intended for collaborative editing.

JOIN | This activity combines packages that were previously split into one single package. The number of split packages must equal the number of packages that are being routed into the join for routing to execute successfully.

END | Ends the Workflow activity and is configurable to export the package and a key field document.

3.5 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. When multiple Connectors are used, Navigation Rules determine the Connector the package uses.

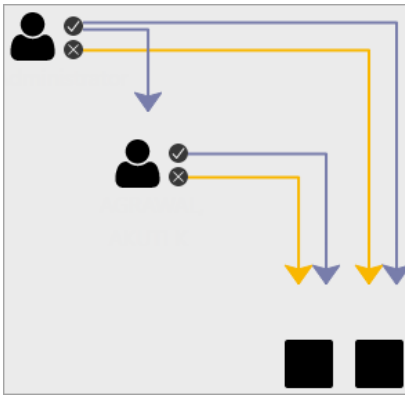


FIGURE 24 Connectors

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.

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.

3.6 Create, Assign and Configure

3.6.1 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.

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

DELETE INSTANCES | When a Workflow is active and has items routing, the total number will display as "In Progress Workflow Instances." An administrator can "DELETE INSTANCES," which will delete ALL instances inside the Workflow. This should only be used during testing.

TEMPLATE STATUS | The current state of the Workflow.

- ▶ In Development – 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 – For use when the Workflow needs to be edited or is no longer in use.

The screenshot shows the 'General Settings' page for a workflow. The left sidebar contains navigation links: Back, General Settings (active), Assignment Rules, Package Name Rules, Designer, and Save. The main content area displays the following information:

- Name:** College Credit Transcript Approval
- Description:** Send College Transcript with a status of needs to be evaluated to workflow. Key field will be updated to processing and send to Assistant of Dean. Assistant will evaluate or refer to another member of the administrative team. If College credit will be awarded forward to Dr. Ralph Murdy who will update Colleague and approve. Key field status will change to evaluated ending the workflow.
- Effective Date:** From June 8, 2017
- Template Status:** In Development
- In Progress Workflow Instances:** 0
- DELETE INSTANCES** button

At the bottom, a 'Workflow Info' section repeats the Name and Description.

FIGURE 25 General Settings

3.6.2 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

The screenshot shows the 'Assignment Rules' page. The left sidebar is identical to Figure 25, but the 'Assignment Rules' link is highlighted. The main content area is titled 'Item Selection' and includes the instruction 'Select the item(s) for this workflow'. It features a search bar with 'Transcript' entered, a 'Filter By' dropdown set to 'Document Types', and radio buttons for 'Associated' and 'Available' (which is selected). A list of items is shown below, with 'TR Official College Transcript' checked. The 'Workflow Info' section at the bottom remains the same as in Figure 25.

FIGURE 26 Assignment Rules

3.6.3 Package Name Rules

A package name is a naming convention that will be associated with a given Workflow. There are two 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.

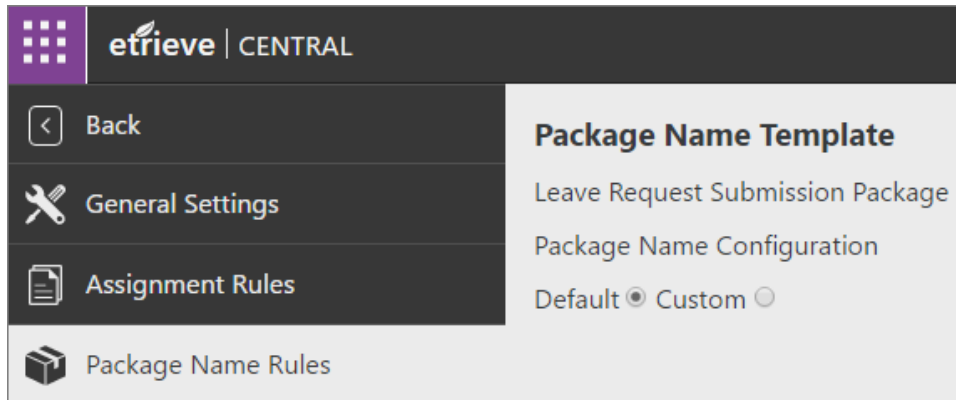


FIGURE 27 Package Name Template | Default

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

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

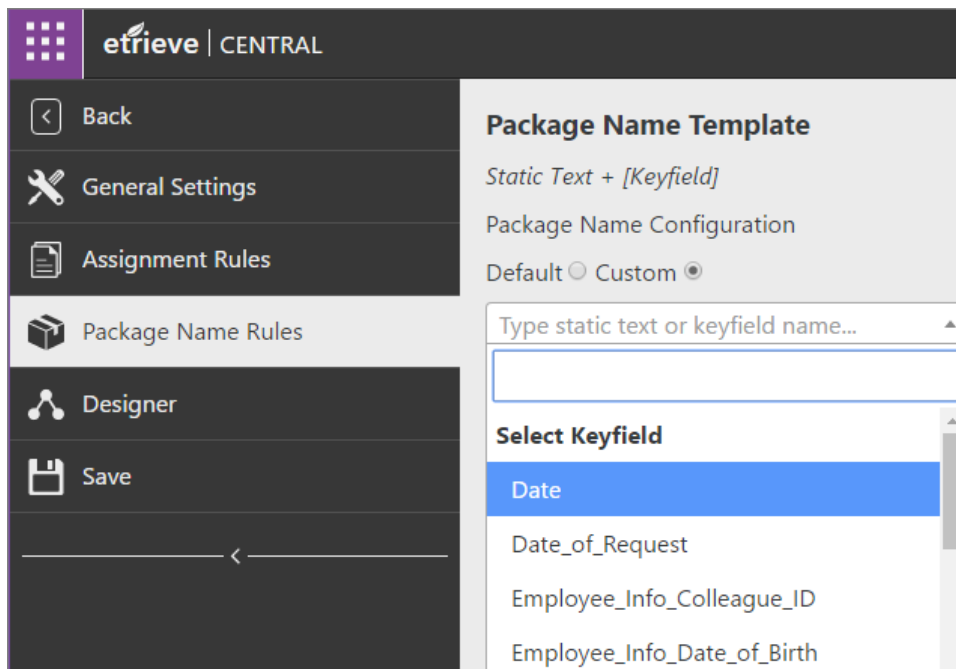


FIGURE 28 Package Name Template | Custom

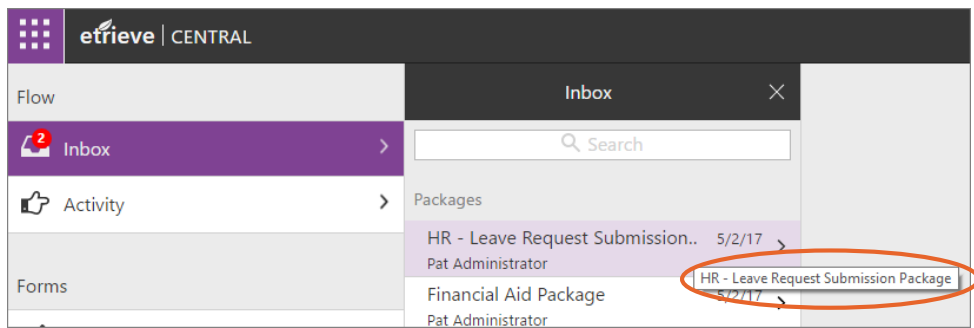


FIGURE 29 Central Inbox | Display of Packages

4

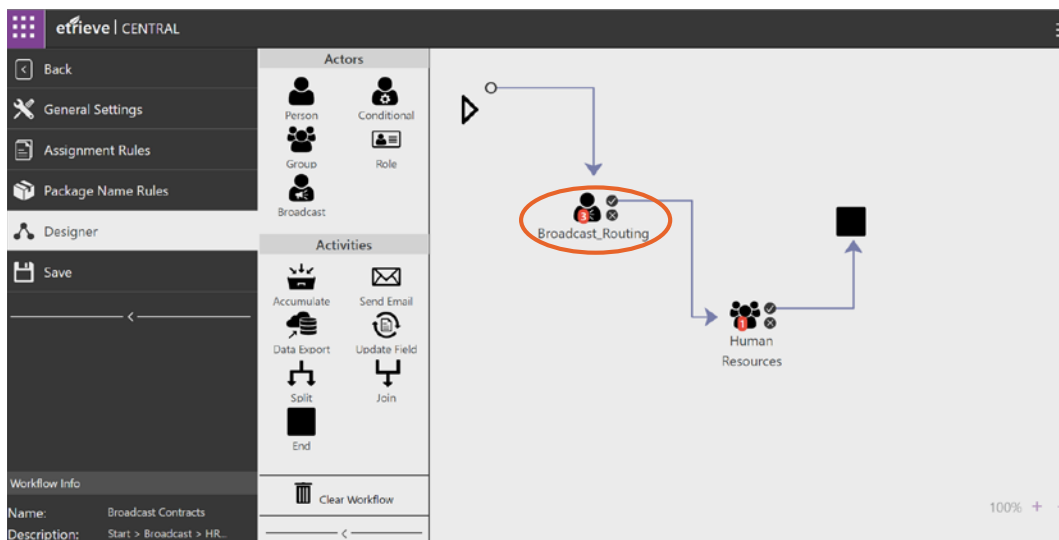
Etrieve Flow Sample Workflows

4.1 Sample Workflows

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

4.1.1 Broadcast Actor

The Broadcast Actor was configured in this Workflow scenario to route Contracts to a group of people. Once the contract has been completed, the contract will then 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)

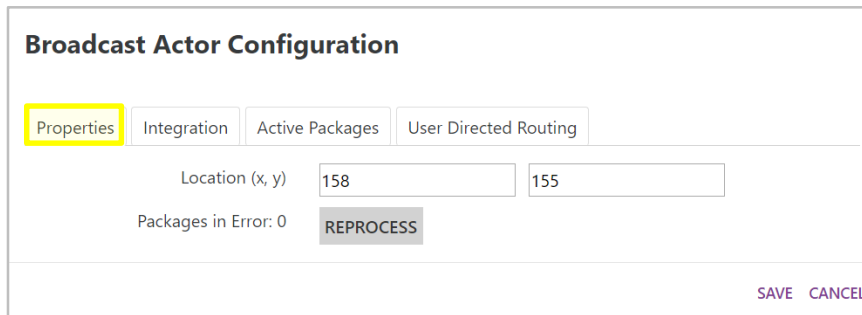
FIGURE 30 Workflow Designer | Broadcast Contracts

1 Broadcast Actor Configuration

BROADCAST ACTOR | A broadcast actor typically allows the representation of steps so that 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 & Denies 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 data that is automatically available.

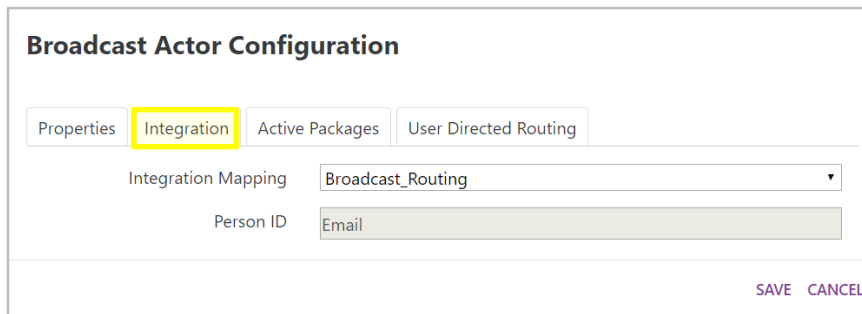
PROPERTIES TAB | The Properties tab for the Broadcast Actor Configuration provides the Location (x, y), the exact coordinate points on the Workflow Designer Configuration Area where the step is located. The Packages in Error indicate any routing errors that need to be resolved.



The screenshot shows the 'Broadcast Actor Configuration' window with the 'Properties' tab selected. It features input fields for 'Location (x, y)' with values 158 and 155, and a 'Packages in Error: 0' indicator with a 'REPROCESS' button. 'SAVE' and 'CANCEL' buttons are at the bottom right.

FIGURE 31 Workflow Designer | Broadcast Actor Configuration | Properties Tab

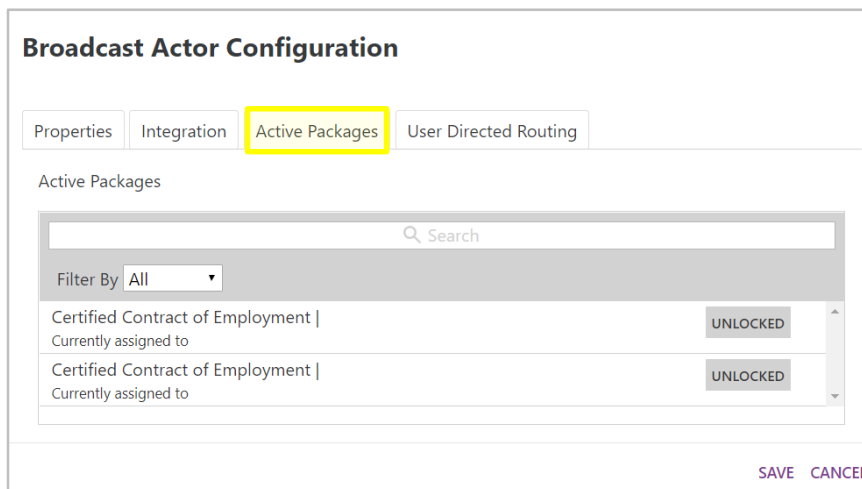
INTEGRATION TAB | The Integration tab is where the integration source will be configured. The source must be created before the integration mapping can be configured. The Person ID must be 'Email' on all broadcast routing configurations.



The screenshot shows the 'Broadcast Actor Configuration' window with the 'Integration' tab selected. It includes a dropdown for 'Integration Mapping' set to 'Broadcast_Routing' and a text field for 'Person ID' containing 'Email'. 'SAVE' and 'CANCEL' buttons are at the bottom right.

FIGURE 32 Workflow Designer | Broadcast Actor Configuration | Integration Tab

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



The screenshot shows the 'Broadcast Actor Configuration' window with the 'Active Packages' tab selected. It features a search bar, a 'Filter By' dropdown set to 'All', and a table of active packages. The table lists 'Certified Contract of Employment | Currently assigned to' with an 'UNLOCKED' status button. 'SAVE' and 'CANCEL' buttons are at the bottom right.

Package Name	Status
Certified Contract of Employment Currently assigned to	UNLOCKED
Certified Contract of Employment Currently assigned to	UNLOCKED

FIGURE 33 Workflow Designer | Broadcast Actor Configuration | Active Packages Tab

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

The screenshot shows the 'Broadcast Actor Configuration' window with the 'User Directed Routing' tab selected and highlighted with a yellow border. Below the tabs, there is a toggle switch for 'Enable User Directed Routing' which is currently turned off. At the bottom right, there are 'SAVE' and 'CANCEL' buttons.

FIGURE 34 Workflow Designer | Broadcast Actor Configuration | User Directed Routing

2 Group Actor Configuration

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

PROPERTIES TAB | The Properties tab for the Group Actor Configuration provides the drop-down selection of the Group that has been configured for Workflow to route. The Location (x, y) provides the exact coordinate points on the Workflow Designer Configuration area where the step is located. The Packages in Error indicate any routing errors that should be resolved.

The screenshot shows the 'Group Actor Configuration' window with the 'Properties' tab selected and highlighted with a yellow border. The 'Group' dropdown menu is set to 'Human Resources'. The 'Location (x, y)' fields are set to '344' and '282'. Below these fields, it says 'Packages in Error: 0' and there is a 'REPROCESS' button. At the bottom right, there are 'SAVE' and 'CANCEL' buttons.

FIGURE 35 Workflow Designer | Group Actor Configuration | Properties Tab

NOTIFY TAB | The Notify tab provides the Email template that the recipient will receive. The Recipient's Email is the email that will receive the designated Email Template. In this scenario we would put the Distribution Email for HR.

The Originator Email Template provides a notification Email to be sent to the originator if necessary.

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

The screenshot shows the 'Group Actor Configuration' window with the 'Notify' tab selected and highlighted with a yellow border. The 'Email Template' dropdown menu is set to 'Choose One...'. The 'Recipient's Email' field contains the text 'Email address of the intended recipient'. The 'Originator Email Template' dropdown menu is set to 'None'. At the bottom right, there are 'SAVE' and 'CANCEL' buttons.

FIGURE 36 Workflow Designer | Group Actor Configuration | Notify Tab

FILTER BY TAB | The Filter By tab is located in the Group Actor settings. It is used to reference 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' dialog with the 'Filter By' tab selected. The dialog has five tabs: 'Properties', 'Notify', 'Filter By', 'Active Packages', and 'User Directed Routing'. Below the tabs, there is a section labeled 'Enable Filter By' with a toggle switch that is currently turned off. At the bottom right, there are 'SAVE' and 'CANCEL' buttons.

FIGURE 37 Workflow Designer | Group Actor Configuration | Filter By

ACTIVE PACKAGES TAB | The Active Packages tab displays all of the Active Packages for the Workflow step. A user can search for a specific package by typing in the Search bar or by selecting the Filter By drop-down selection. The filter can be applied for All, Locked and Unlocked packages. It also gives the ability for an administrator to unlock a package that was locked by another user.

The screenshot shows the 'Group Actor Configuration' dialog with the 'Active Packages' tab selected. The dialog has five tabs: 'Properties', 'Notify', 'Filter By', 'Active Packages', and 'User Directed Routing'. Below the tabs, there is a section labeled 'Active Packages'. Inside this section, there is a search bar with a magnifying glass icon and the word 'Search'. Below the search bar, there is a 'Filter By' dropdown menu currently set to 'All'. Below the dropdown, there is a table with one row of data. The table has two columns: the first column contains the text 'Certified Contract of Employment | ABERNATHY' and 'Currently assigned to Human Resources'; the second column contains the text 'LOCKED' and 'Locked by Robert Gunning'. At the bottom right, there are 'SAVE' and 'CANCEL' buttons.

FIGURE 38 Workflow Designer | Group Actor Configuration | Active Packages Tab

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

The screenshot shows the 'Group Actor Configuration' dialog with the 'User Directed Routing' tab selected. The dialog has five tabs: 'Properties', 'Notify', 'Filter By', 'Active Packages', and 'User Directed Routing'. Below the tabs, there is a section labeled 'Enable User Directed Routing' with a toggle switch that is currently turned off. To the right of the toggle switch, there is a message: 'No available actors for User Directed Routing.' At the bottom right, there are 'SAVE' and 'CANCEL' buttons.

FIGURE 39 Workflow Designer | Group Actor Configuration | User Directed Routing

4.1.2 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 originators' supervisor based off of 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.

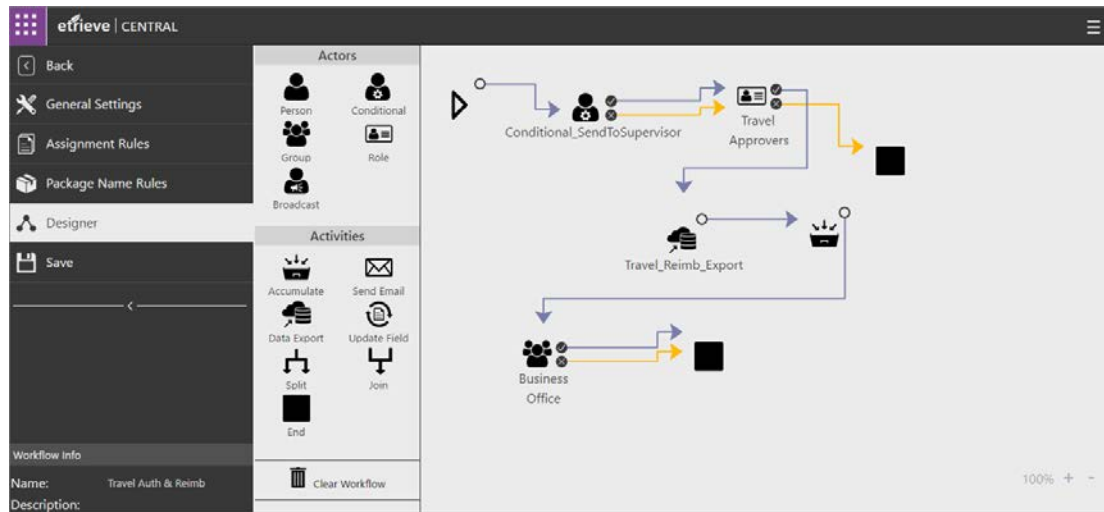


FIGURE 40 Workflow Designer | Travel Authorization and Reimbursements

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 (recipient can differ from package to package).

PROPERTIES TAB | The Properties tab for the Conditional Actor Configuration provides the Location (x, y), the exact coordinate points on the Workflow Designer Configuration Area where the step is located. The Packages in Error indicate any routing errors that need to be resolved.

Conditional Actor Configuration

Properties

Notify

Integration

Active Packages

User Directed Routing

Location (x, y)

174

43

Packages in Error: 0

REPROCESS

SAVE

CANCEL

FIGURE 41 Workflow Designer | Conditional Actor Configuration | Properties Tab

NOTIFY TAB | The Notify tab provides the Email template that the recipient will receive. The Recipient’s Email is the email that will receive the designated Email Template. In this scenario you would not need to place a recipient’s email because they will receive one automatically.

The Originator Email Template provides a notification Email to be sent to the originator if necessary.

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

Conditional Actor Configuration

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

Email Template Choose One...

Recipient's Email Email address of the intended recipient

Originator Email Template None

SAVE CANCEL

FIGURE 42 Workflow Designer | Conditional Actor Configuration | Notify Tab

INTEGRATION TAB | The Integration tab is where the integration source will be configured. The source must be created before the integration mapping can be configured. The Fields key is a drop-down list of fields that are specified as input from Etrieve Forms earlier in 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** Active Packages User Directed Routing

Integration Mapping Conditional_SendToSupervisor

Fields x superUsername x

Actor Type Person

Default Actor Terri McKinney x

SAVE CANCEL

FIGURE 43 Workflow Designer | Conditional Actor Configuration | Integration Tab

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

Conditional Actor Configuration

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

Active Packages

Search

Filter By All

SAVE CANCEL

FIGURE 44 Workflow Designer | Conditional Actor Configuration | Active Packages Tab

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

Conditional Actor Configuration

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

Enable User Directed Routing ☐

SAVE CANCEL

FIGURE 45 Workflow Designer | Conditional Actor Configuration | User Directed Routing Tab

2 Role Actor Configuration

ROLE | All users who have been assigned to the selected role will receive the package.

PROPERTIES TAB | The Properties tab for the Role Actor Configuration contains a drop-down list to select the Role. This tab also provides the Location (x, y), the exact coordinate points on the Workflow Designer Configuration Area where the step is located. The Packages in Error indicate any routing errors that need to be resolved.

Role Actor Configuration

Properties **Notify** Filter By Active Packages User Directed Routing

Role Travel Approvers x

Location (x, y) 374 29

Packages in Error: 0 REPROCESS

SAVE CANCEL

FIGURE 46 Workflow Designer | Role Actor Configuration | Properties Tab

NOTIFY TAB | The Notify tab provides the Email template that the recipient will receive. The Recipient's Email is the email that will receive the designated Email Template. In this scenario we would place a Distribution Email for the Travel Approvers.

The Originator Email Template provides a notification Email to be sent to the originator if necessary.

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

Role Actor Configuration

Properties **Notify** Filter By Active Packages User Directed Routing

Email Template Choose One...

Recipient's Email Email address of the intended recipient

Originator Email Template None

SAVE CANCEL

FIGURE 47 Workflow Designer | Role Actor Configuration | Notify Tab

FILTER BY TAB | The Filter By tab is located in the Role 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. This workflow example does not utilize this feature.

Role Actor Configuration

Properties | Notify | **Filter By** | Active Packages | User Directed Routing

Enable Filter By ☐

SAVE CANCEL

FIGURE 48 Workflow Designer | Role Actor Configuration | Filter By

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

Role Actor Configuration

Properties | Notify | Filter By | **Active Packages** | User Directed Routing

Active Packages

Search

Filter By: All
All
Unlocked
Locked

SAVE CANCEL

FIGURE 49 Workflow Designer | Role Actor Configuration | Active Packages Tab

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

Role Actor Configuration

Properties | Notify | Filter By | Active Packages | **User Directed Routing**

Enable User Directed Routing ☐ No available actors for User Directed Routing.

SAVE CANCEL

FIGURE 50 Workflow Designer | Role Actor Configuration | User Directed Routing

3 Data Export Activity Configuration

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 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 to this table – all green flagged key field values will be exported to the table as columns in specific forms row. The ID's 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. The tab also provides the Location (x, y), the exact coordinate points on

the Workflow Designer Configuration Area where the step is located. The Packages in Error indicate any routing errors that need to be resolved.

The screenshot shows the 'Data Export Activity Configuration' window with the 'Properties' tab selected. It contains the following fields: 'Item' set to 'Travel Reimbursement', 'Integration Mapping' set to 'Travel_Reimb_Export', and 'Location (x, y)' with values '289' and '184'. Below these is a 'Packages in Error: 0' label and a 'REPROCESS' button. At the bottom right are 'SAVE' and 'CANCEL' buttons.

FIGURE 51 Workflow Designer | Data Export Configuration | Properties Tab

4 Accumulate Activity Configuration

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

PROPERTIES TAB | The Properties tab for the Accumulate Activity Configuration provides the Location (x, y), the exact coordinate points on the Workflow Designer Configuration Area where the step is located. The Packages in Error indicate any routing errors that need to be resolved.

The screenshot shows the 'Accumulate Activity Configuration' window with the 'Properties' tab selected. It contains the following fields: 'Location (x, y)' with values '462' and '175', and a 'Packages in Error: 0' label with a 'REPROCESS' button. At the bottom right are 'SAVE' and 'CANCEL' buttons.

FIGURE 52 Workflow Designer | Accumulate Activity Configuration | Properties Tab

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

The screenshot shows the 'Accumulate Activity Configuration' window with the 'Criteria' tab selected. It features a 'Group by shared keyfield' dropdown set to 'travelNumber'. Below is a table with two rows of criteria:

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

At the bottom right are 'SAVE' and 'CANCEL' buttons.

FIGURE 53 Workflow Designer | Accumulate Activity Configuration | Criteria Tab

PACKAGE NAME TAB | The Package Name tab provides the template for the name of the Package as well as the choice to default to the name chosen or create a custom, unique name for this accumulated package.

The screenshot shows the 'Accumulate Activity Configuration' dialog with the 'Package Name' tab selected. The 'Package Name Template' section includes 'Travel Auth & Reimb Package', 'Package Name Configuration', and radio buttons for 'Default' (selected) and 'Custom'. 'SAVE' and 'CANCEL' buttons are at the bottom right.

FIGURE 54 Workflow Designer | Accumulate Activity Configuration | Package Name 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 in regards to the Package being created. When designing a Workflow with only one form/document, the system provides for the accumulate activity configuration to group by the key fields available in a single form by using the key fields associated with the form. Accumulation behavior can be configured on New Packages, Add to Existing Packages or Drop if not needed.

The screenshot shows the 'Accumulate Activity Configuration' dialog with the 'Accumulation Type' tab selected. The 'Accumulation Behavior Type' dropdown menu is open, showing options: 'New Package' (selected), 'Choose One...', 'New Package', 'Add to existing', and 'Drop if not needed'. 'SAVE' and 'CANCEL' buttons are at the bottom right.

FIGURE 55 Workflow Designer | Accumulate Activity Configuration | Accumulation Behavior Type Tab

5 Group Actor Configuration

GROUP | All users who are members of the chosen group will receive the package.

PROPERTIES TAB | The Properties tab for the Group Actor Configuration provides a drop-down list to select which specific group should be targeted. This tab also provides the Location (x, y), the exact coordinate points on the Workflow Designer Configuration Area where the step is located. The Packages in Error indicate any routing errors that need to be resolved.

The screenshot shows the 'Group Actor Configuration' dialog with the 'Properties' tab selected. The 'Group' dropdown is set to 'Business Office'. The 'Location (x, y)' fields are '114' and '342'. The 'Packages in Error: 0' section has a 'REPROCESS' button. 'SAVE' and 'CANCEL' buttons are at the bottom right.

FIGURE 56 Workflow Designer | Group Actor Configuration | Properties Tab

NOTIFY TAB | The Notify tab provides the Email template that the recipient will receive. The Recipient's Email is the email that will receive the designated Email Template. In this scenario, we would place a Distribution Email for the Travel Approvers.

The Originator Email Template provides a notification email to be sent to the originator if necessary. Refer to the Appendix for a list of the base Email templates and sample body text for additional information.

The screenshot shows the 'Group Actor Configuration' dialog with the 'Notify' tab selected. The 'Email Template' field is set to 'Loading...'. The 'Recipient's Email' field contains the placeholder text 'Email address of the intended recipient'. The 'Originator Email Template' field is also set to 'Loading...'. At the bottom right, there are 'SAVE' and 'CANCEL' buttons.

FIGURE 57 Workflow Designer | Group Actor Configuration | Notify Tab

FILTER BY TAB | The Filter By tab is located in the Role 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. This workflow example does not utilize this feature.

The screenshot shows the 'Group Actor Configuration' dialog with the 'Filter By' tab selected. The 'Enable Filter By' toggle switch is turned off. At the bottom right, there are 'SAVE' and 'CANCEL' buttons.

FIGURE 58 Workflow Designer | Group Actor Configuration | Active Packages Tab

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

The screenshot shows the 'Group Actor Configuration' dialog with the 'Active Packages' tab selected. The 'Active Packages' section contains a search bar with a magnifying glass icon and the text 'Search'. Below the search bar is a 'Filter By' dropdown menu currently set to 'All'. Below the dropdown is a 'Loading...' indicator. At the bottom right, there are 'SAVE' and 'CANCEL' buttons.

FIGURE 59 Workflow Designer | Group Actor Configuration | Active Packages Tab

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

Group Actor Configuration

Properties

Notify

Filter By

Active Packages

User Directed Routing

Enable User Directed Routing

No available actors for User Directed Routing.

SAVE

CANCEL

FIGURE 60 Workflow Designer | Group Actor Configuration | User Direction Routing

4.1.3 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 is used to update the applicable document type's key fields as the route is being 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.

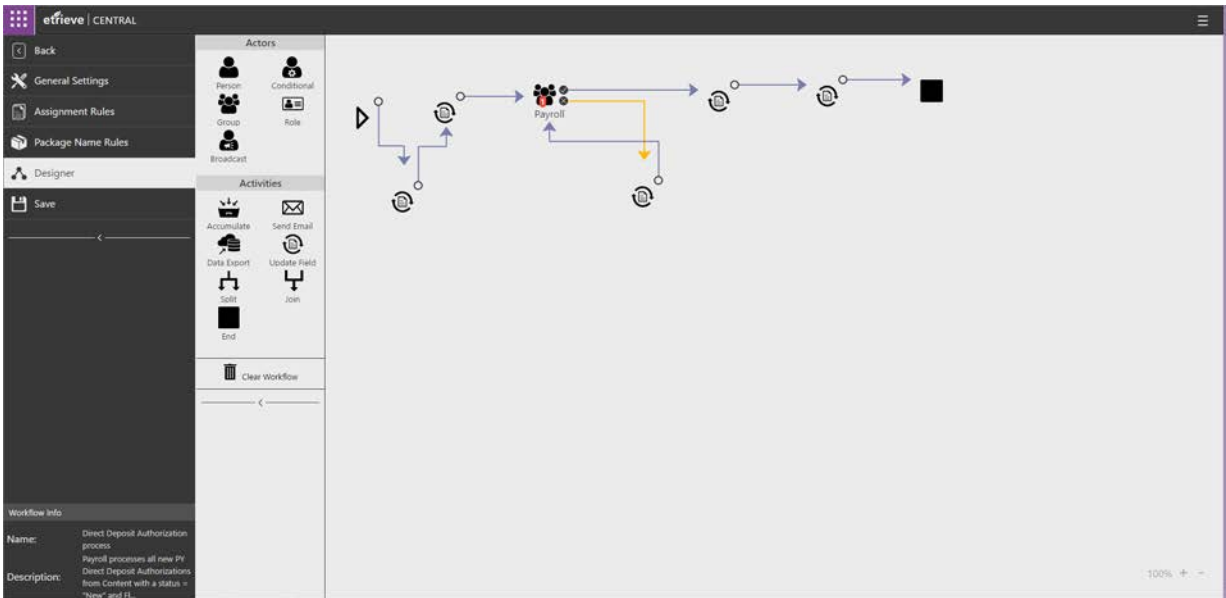


FIGURE 61 Workflow Designer | Direct Deposit Authorization Process

1 Update Content Field Activity Configuration

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

PROPERTIES TAB | The Properties tab for the Update Content Field Activity Configuration provides a drop-down list to select which item from the list of assigned document types to be updated. Next to that, 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. This tab also provides the Location (x, y), the exact coordinate points on the Workflow Designer Configuration Area where the step is located. The Packages in Error indicate any routing errors that need to be resolved.

Update Content Field Activity Configuration

Properties

Item

PY_Direct_Deposit_Authorization

New Value

Under Review

Location (x, y)

157

Packages in Error: 0

REPROCESS

Keyfield

Status

Employee_Info_Last Name

Employee_Info_Suffix

Employee_Info_Nickname_Prefered_Name

Employee_Info_Date_of_Birth

FIGURE 62 Workflow Designer | Update Content Field Activity | Properties Tab

4.1.4 Join and Split– Illustration of Best Practice

In this Workflow configuration scenario, the Split Activity is configured to allow for the package to be split and routed 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 packages that were previously split and send them to the group Human Resources Supervisor and once approved, the process ends.

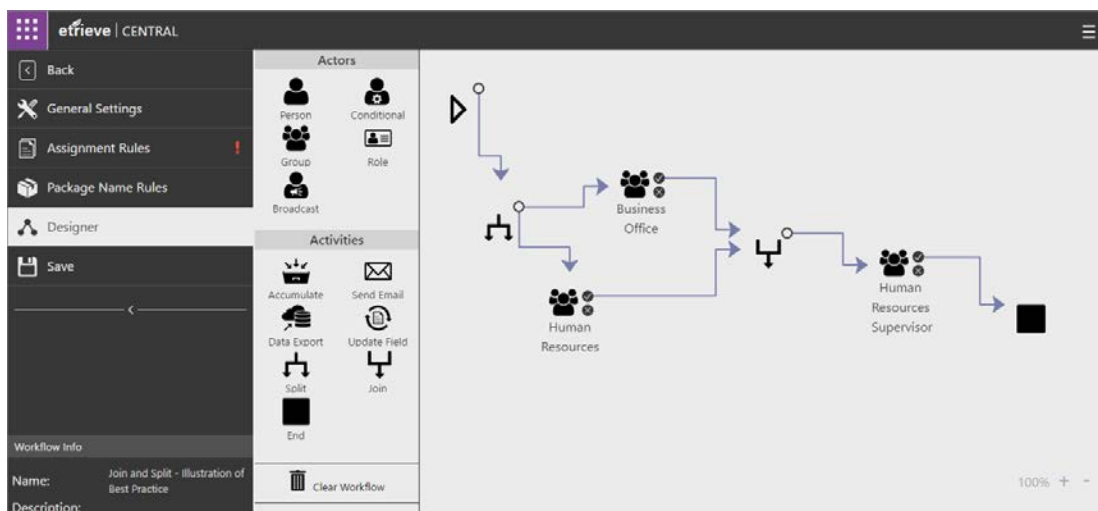


FIGURE 63 Workflow Designer | Join and Split – Illustration of Best Practice

1 Split Activity Configuration

SPLIT | This activity is used to duplicate the package to allow the package to be routed to multiple actors/activities simultaneously.

PROPERTIES TAB | The Properties tab for the Split Activity Configuration provides the Location (x, y), the exact coordinate points on the Workflow Designer Configuration Area where the step is located. The Packages in Error indicate any routing errors that need to be resolved.



Split Activity Configuration

Properties

Location (x, y) 69 164

Packages in Error 0 **REPROCESS**

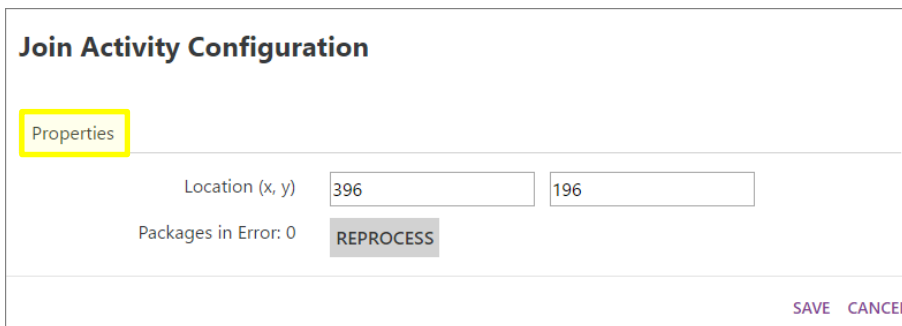
SAVE CANCEL

FIGURE 64 Workflow Designer | Split Activity Configuration | Properties Tab

2 Join Activity Configuration

JOIN | This activity combines packages that were previously split into one single package. The number of packages must equal the number of packages that are being routed into the Join for routing to execute successfully.

PROPERTIES TAB | The Properties tab for the Join Activity Configuration provides the Location (x, y), the exact coordinate points on the Workflow Designer Configuration Area where the step is located. The Packages in Error indicate any routing errors that need to be resolved.



Join Activity Configuration

Properties

Location (x, y) 396 196

Packages in Error: 0 **REPROCESS**

SAVE CANCEL

FIGURE 65 Workflow Designer | Join Activity Configuration | Properties Tab

4.1.5 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 that were split into separate packages. If Human Resources denied the package, the package approved by the Business Office will get held in the Join Activity resulting in a Workflow that will not execute.

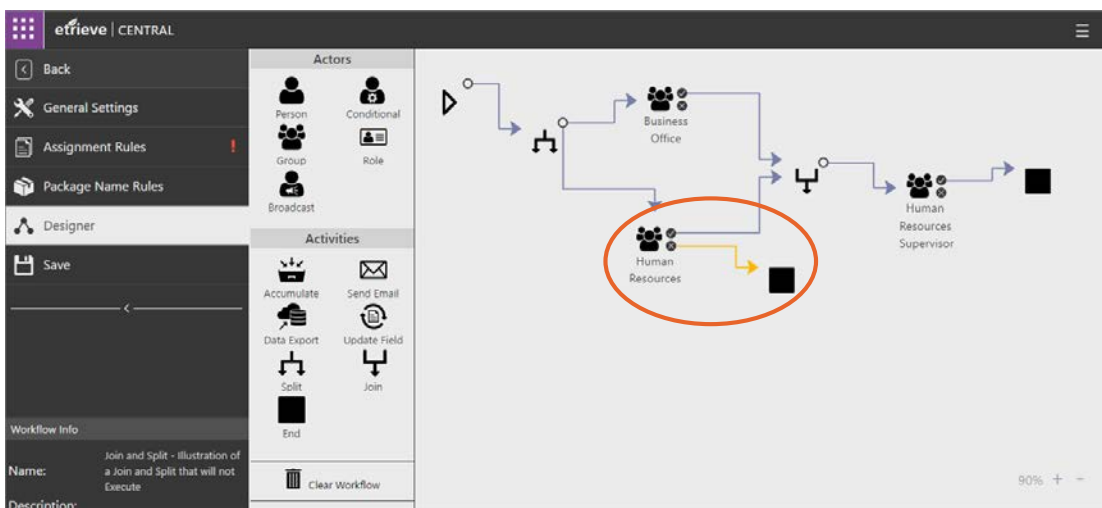


FIGURE 66 Workflow Designer | Join and Split – Illustration of a Join and Split that will not Execute

4.1.6 Actor Filtering, User Directed Routing, Navigation Rules Determined by Groups or Roles

In this Workflow scenario, a Leave Request Form is originated by an employee and sent to their specific supervisor by utilizing the 'Filter By' setting on the Supervisors Group Actor. The supervisor reviews the package and either denies the request or approves it to 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.

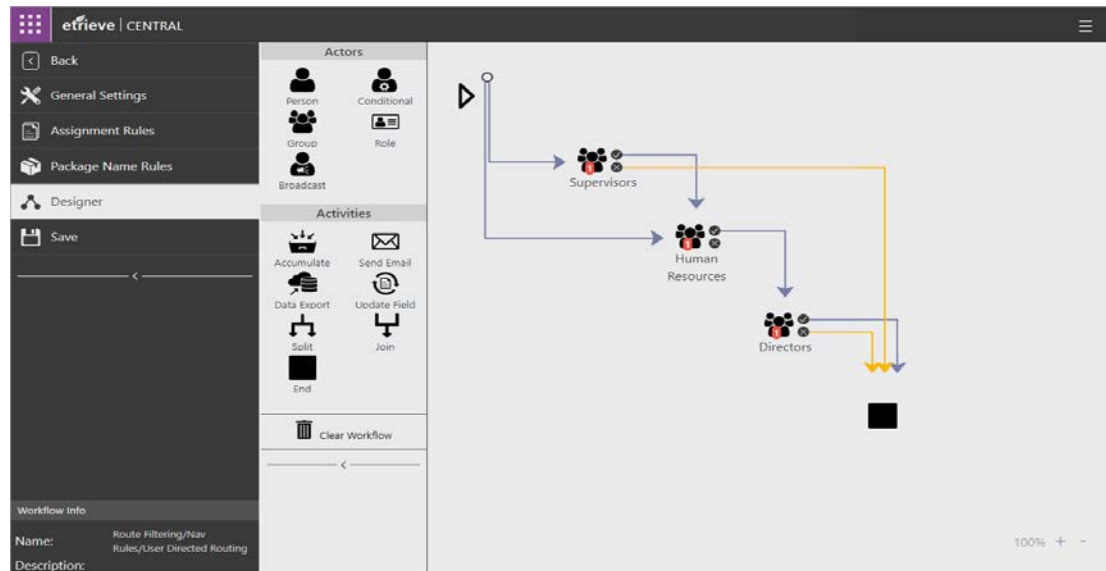


FIGURE 67 Workflow Designer | Leave Request

1 Filter By Configuration – Filter Supervisors Group Actor

FILTER BY | The Filter By tab is located in the Role 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. This workflow example does not utilize this feature.

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

Group Actor Configuration

Properties | Notify | **Filter By** | Active Packages | User Directed Routing

Enable Filter By ☒

Select a previous step and user attribute to filter by.

Start Activity Location x ▾

SAVE CANCEL

FIGURE 68 Workflow Designer | Group Actor Configuration | Filter By

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

Select submission data

Maintenance x ▾

SEND CANCEL

Submit Attachments Download Print

FIGURE 69 Etrieve Central Viewer | Select Submission Data

2 User Directed Routing Configuration – Send to 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 located in the Group Actor settings. This enables Users to specify which users within a group should receive a package rather than routing to an entire group. It is configured on the actor that will be choosing the recipient. Any group that the actor is connected too can be selected for User Directed Routing.

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

Group Actor Configuration

Properties | Notify | Filter By | Active Packages | **User Directed Routing**

Enable User Directed Routing ☒

Allow (drill down) selection of individuals inside Groups/Roles

Select All | Deselect All

Search

☒ Directors

SAVE CANCEL

FIGURE 70 Workflow Designer | Group Actor Configuration | User Directed Routing

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

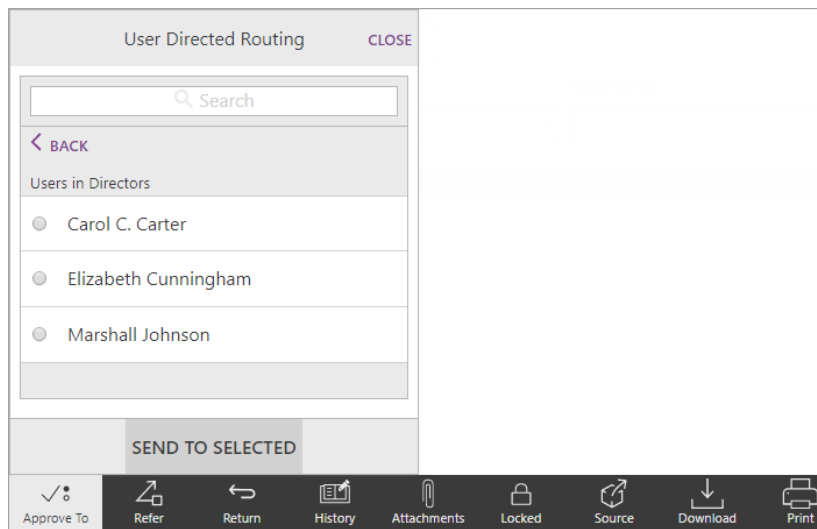


FIGURE 71 Etrieve Central Viewer | User Directed Routing

3 Navigation Rule Configuration – Send to Supervisor or Human Resources

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

CONFIGURATION | To enable this functionality, select the Connector pointing towards the Human Resources actor and click the Settings Cog. 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.

Navigation Rules Configuration

Add/Remove And/Or	Type	Keyfield/Attribute	Operator	Value
+	Actor Attributes x	Groups x	Contain	Supervi... x

SAVE
CANCEL

FIGURE 72 Workflow Designer | Navigation Rule Configuration

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

Navigation Rules Configuration

Add/Remove And/Or	Type	Keyfield/Attribute	Operator	Value
+	Actor Attributes x	Groups x	Do not Contain	Supervi... x

SAVE
CANCEL

FIGURE 73 Workflow Designer | Navigation Rule Configuration

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

5

Appendix

5.1 Email Templates and Sample Body Text

Name		Body Email
1	ReceiptNotification	The Workflow package '<%= PackageName %>' has been <%= PreviousStepActionWithActor %> and is available for your review. <%= PreviousStepComment %> To access it, please [click here]. [click here]: <%= InboxPackageDeepLinkId %>
2	ThirdPartyNotificationWithComments	The Workflow package '<%= PackageName %>' has been <%= PreviousStepActionWithActor %>. <%= PreviousStepComment %>
3	FlowNotification	The Workflow package '<%= PackageName %>' submitted by <%= PreviousStepActor %> is in Etrieve Flow.
4	OriginatorNotification_CurrentStepActionWithActor	The Workflow package '<%= PackageName %>' containing a document submitted by you has been <%= CurrentStepDecision %> by <%= CurrentStepActor %>.
5	OriginatorNotification_CurrentStepActionWithoutActor	The Workflow package '<%= PackageName %>' containing a document submitted by you has been <%= CurrentStepDecision %>.
6	OriginatorNotification_PreviousStepActionWithActor	The Workflow package '<%= PackageName %>' containing a document submitted by you has been <%= PreviousStepActionWithActor %>.
7	7 OriginatorNotification_PreviousStepActionWithoutActor	The Workflow package '<%= PackageName %>' containing a document submitted by you has been <%= PreviousStepDecision %>.
8	OriginatorNotification_Processed	The Workflow package '<%= PackageName %>' containing a document submitted by you has been processed.
Name		Body Email

9	OriginatorNotification_ProcessedWithPreviousStepActor	The Workflow package '<%= PackageName %>' containing a document submitted by you has been processed by <%= PreviousStepActor %>.
10	OriginatorNotification_Received	The Workflow package '<%= PackageName %>' containing a document submitted by you has been received.