Workflow Submission Module

User Manual - Console Interface

SONARWORKS WORKFLOW SYSTEM

Version 1.1

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1. Introduction

The Workflow Submission module enables users to initiate business processes by filling out and submitting workflow forms. Submissions are routed through predefined approval chains for review and action.

What You Can Do:

- Browse available workflows
- Fill out and submit workflow forms
- Attach supporting documents
- Save incomplete submissions as drafts
- Edit draft submissions
- Recall submitted workflows for changes

[Screenshot: Workflow Submission Overview]

Figure: Workflow Submission Overview

2. Accessing Workflows

2.1 From the Dashboard

Steps:

Step 1: Log in to the Sonar Workflow System

Step 2: From the Dashboard, locate the 'Available Workflows' section

Step 3: Click on any workflow card to start a new submission

Step 4: Or click 'View All' to see the complete list

2.2 From the Workflows Menu

Steps:

Step 1: Click 'Workflows' in the navigation sidebar

Step 2: The Workflows list page displays all available workflows

Step 3: Use the search box to find specific workflows

Step 4: Filter by category if needed (Financial/Non-Financial)

Step 5: Click on a workflow to start a new submission

[Screenshot: Workflows List Page]

Figure: Workflows List Page

2.3 Workflow Visibility

You only see workflows that:

- Are published (active)
- You have permission to access based on your organization
- Match your role or department restrictions

NOTE: If you don't see an expected workflow, contact your administrator to verify access permissions.

3. Starting a New Submission

3.1 Initiating a Workflow

Steps:

Step 1: Navigate to the Workflows list

Step 2: Click on the workflow you want to submit

Step 3: The workflow form opens in a new page

Step 4: Review the workflow description and instructions

Step 5: Begin filling out the required fields

3.2 Understanding the Form Layout

Section	Description
Header	Shows workflow name and reference number (assigned on submit)
Instructions	Important notes or guidance from administrators
Form Fields	Input fields to fill out organized in groups
Attachments	Section to upload supporting documents
Action Buttons	Save Draft, Submit, Cancel buttons

[Screenshot: New Submission Form Layout]

Figure: New Submission Form Layout

4. Filling Out the Form

4.1 Required vs Optional Fields

Fields marked with a red asterisk (*) are required and must be completed before submission.

Indicator	Meaning
Red asterisk (*)	Required field - must be filled
No asterisk	Optional field - can be left empty
Grayed out	Read-only field - cannot be edited
Red border	Field has validation error

4.2 Form Validation

The system validates your input as you type:

- Required fields must have a value
- Email fields must be valid email format
- Number fields must be within allowed range
- Date fields must be valid dates
- Text fields must meet length requirements

Validation Error Display:

- Invalid fields show a red border
- Error message appears below the field
- Fields with errors must be corrected before submission
- All errors are summarized at the top when you try to submit

[Screenshot: Form Validation Error Example]

Figure: Form Validation Error Example

4.3 Field Help Text

Many fields include help text that appears below the field label. This provides guidance on what information to enter.

Example: Help Text Example

Field: Purchase Amount

Help Text: "Enter the total amount in your local currency. Include taxes if applicable."

Field: Justification

Help Text: "Explain why this purchase is needed. Minimum 50 characters."

5. Working with Different Field Types

5.1 Text Fields

Field Type	How to Use
Single-line Text	Type directly into the field
Multi-line Text	Type or paste text, use Enter for new lines
Email	Enter valid email format (user@domain.com)
Phone	Enter phone number (format may be validated)
URL	Enter full URL including https://

5.2 Number and Currency Fields

For numeric fields:

- Enter numbers only (no letters)
- Decimals are allowed where configured
- Currency fields may show a currency symbol
- Negative numbers may or may not be allowed
- Min/max limits are enforced

Example: Currency Field Input

Field: Total Amount

Input: 1500.00

Display: $1,500.00

The system formats the number as currency

5.3 Date and DateTime Fields

Using the Date Picker:

Step 1: Click on the date field to open the date picker

Step 2: Navigate to the desired month using arrows

Step 3: Click on the day to select it

Step 4: For DateTime fields, also select the time

Step 5: The selected date appears in the field

[Screenshot: Date Picker Calendar]

Figure: Date Picker Calendar

5.4 Dropdown and Selection Fields

Field Type	How to Use
Dropdown (Select)	Click field, choose one option from list
Multi-Select	Click field, check multiple options, click outside to close
Radio Buttons	Click one option (only one can be selected)
Checkboxes	Check/uncheck multiple options as needed

Using Dropdown Fields:

Steps:

Step 1: Click on the dropdown field

Step 2: A list of options appears

Step 3: Type to filter/search options (if search enabled)

Step 4: Click on your selection

Step 5: The dropdown closes and shows your selection

5.5 User Selection Fields

Some fields require you to select a user from the system:

Steps:

Step 1: Click on the user field

Step 2: A searchable user list appears

Step 3: Type to search by name or username

Step 4: Click on the user to select

Step 5: The selected user's name appears in the field

5.6 Accordion and Collapsible Sections

Some forms organize fields into expandable/collapsible sections to make long forms easier to navigate. These sections help group related information together.

Accordion Sections:

- An Accordion contains multiple collapsible sections
- Click on a section header to expand it
- Only one section within an Accordion can be expanded at a time
- Expanding a new section automatically closes the previously open one

Standalone Collapsible Sections:

- A standalone Collapsible can be expanded independently
- Multiple standalone Collapsibles can be open simultaneously
- Click the section header to expand or collapse

Working with Collapsible Sections:

Step 1: Locate the collapsible section header (shows arrow indicator)

Step 2: Click on the header to expand the section

Step 3: Fill out the fields within the expanded section

Step 4: Click the header again to collapse (optional)

Step 5: Move to the next section or proceed with form submission

[Screenshot: Accordion with Expanded Section]

Figure: Accordion with Expanded Section

6. File Attachments

6.1 Attaching Files

Steps:

Step 1: Locate the attachment field or section

Step 2: Click 'Choose File' or drag and drop files

Step 3: Select file(s) from your computer

Step 4: Wait for upload to complete

Step 5: Attached file appears in the list

6.2 Attachment Restrictions

Attachments may have restrictions configured by administrators:

Restriction	Typical Values
Allowed File Types	PDF, DOC, DOCX, XLS, XLSX, PNG, JPG
Maximum File Size	5MB, 10MB, 25MB per file
Maximum Number of Files	1, 5, 10 files

6.3 Managing Attachments

- View: Click on filename to preview/download
- Remove: Click the delete (X) icon to remove
- Replace: Remove existing and upload new file

TIP: Ensure you attach all required supporting documents before submission. Missing documents may cause rejection.

[Screenshot: File Attachment Section]

Figure: File Attachment Section

7. Multi-Step Forms

Some workflows have multiple screens (steps) to organize complex forms. You must complete each screen before proceeding to the next.

7.1 Navigating Multi-Step Forms

Action	How To	Notes
Go to Next Step	Click 'Next' button	Current screen must be valid
Go to Previous Step	Click 'Previous' button	Data is preserved
Jump to Step	Click step indicator (if enabled)	Only completed steps
Submit	Click 'Submit' on final step	All steps must be valid

7.2 Step Indicator

The step indicator at the top shows:

- Current step highlighted
- Completed steps marked with checkmark
- Remaining steps shown
- Total number of steps (e.g., Step 2 of 4)

[Screenshot: Multi-Step Form with Step Indicator]

Figure: Multi-Step Form with Step Indicator

7.3 Summary Screens

Some workflows include a Summary screen as the final step. This screen displays all the information you've entered across all previous steps in read-only format, allowing you to review before final submission.

On a Summary Screen:

- All fields are displayed in read-only mode
- Data is organized by the screens/sections it was entered in
- You can navigate back to previous steps to make corrections
- Click 'Submit' only when satisfied with all information

[Screenshot: Summary Screen Review]

Figure: Summary Screen Review

7.4 Validation Between Steps

When clicking 'Next':

1. System validates all fields on current step
2. If valid, you proceed to next step
3. If errors exist, you stay on current step
4. Error messages highlight which fields need attention

8. Saving as Draft

If you cannot complete a submission in one session, save it as a draft to continue later.

8.1 How to Save Draft

Steps:

Step 1: Fill out as much of the form as you can

Step 2: Click the 'Save Draft' button

Step 3: A confirmation message appears

Step 4: The draft is saved and you can navigate away safely

8.2 Finding Your Drafts

Steps:

Step 1: Navigate to 'My Submissions' in the sidebar

Step 2: Filter by Status: 'Draft'

Step 3: Or look in the Dashboard 'Drafts' section

Step 4: Click on a draft to continue editing

8.3 Draft Behavior

- Drafts are not sent for approval

- Drafts have no reference number yet
- You can edit drafts unlimited times
- Drafts are visible only to you (the creator)
- Drafts do not expire automatically

WARNING: Remember to submit your drafts when complete. Approvers cannot see or act on drafts.

9. Submitting for Approval

9.1 Pre-Submission Checklist

Before submitting, verify:

- All required fields are completed
- Information entered is accurate
- All necessary attachments are uploaded
- You've reviewed the form for errors

9.2 Submission Process

Steps:

Step 1: Review all entered information

Step 2: Click the 'Submit' button

Step 3: A confirmation dialog appears

Step 4: Click 'Confirm' to submit

Step 5: Success message shows with reference number

Step 6: Workflow is now pending approval

9.3 What Happens After Submission

Event	Description
Reference Number Assigned	Unique tracking number (e.g., WF-2024-00123)
Status Changes to Pending	Workflow enters approval queue
First Approver Notified	Email sent to Level 1 approver
Visible in My Submissions	You can track status in My Submissions
Audit Log Created	Submission recorded for audit trail

[Screenshot: Submission Success Message]

Figure: Submission Success Message

9.4 Tracking Your Submission

After submitting:

Steps:

Step 1: Go to 'My Submissions' in the sidebar

Step 2: Find your submission in the list

Step 3: Click to view details and current status

Step 4: Check 'Approval History' to see progress

10. Editing Submissions

10.1 When Can You Edit?

Status	Can Edit?	Notes
Draft	Yes	Full editing allowed
Pending	No	Must recall first
Approved	No	Submit new workflow
Rejected	No	Submit new workflow
Recalled	Yes	After recall, can edit and resubmit

10.2 Editing a Draft

Steps:

Step 1: Navigate to My Submissions

Step 2: Filter by Status: Draft

Step 3: Click on the draft submission

Step 4: Make your changes

Step 5: Save Draft again or Submit when ready

11. Recalling Submissions

If you need to make changes to a submitted workflow, you can recall it (if enabled and not yet fully approved).

11.1 Recall Conditions

You can recall a submission when:

- Status is Pending (not yet fully approved)
- Recall is enabled for the workflow
- You are the original initiator

11.2 How to Recall

Steps:

Step 1: Navigate to My Submissions

Step 2: Find the pending submission

Step 3: Click to open the details

Step 4: Click the 'Recall' button

Step 5: Enter a reason for recalling

Step 6: Confirm the recall action

Step 7: Status changes to 'Recalled'

11.3 After Recall

- Submission is removed from approver queues
- You can now edit the submission
- Make necessary changes
- Resubmit when ready
- Approval process starts over from Level 1

TIP: Use recall sparingly. Frequent recalls may indicate need for better preparation before initial submission.

[Screenshot: Recall Button on Submission Detail]

Figure: Recall Button on Submission Detail

12. Common Issues and Solutions

Issue	Cause	Solution
Can't find workflow	Access restricted or unpublished	Contact administrator
Submit button disabled	Required fields empty or invalid	Complete all required fields

File upload fails	File too large or wrong type	Check file restrictions
Validation error	Input doesn't match requirements	Read error message, correct input
Draft not saving	Network issue or session timeout	Check connection, log in again
Can't recall	Already approved or recall disabled	Contact approver or admin
Date picker not working	Browser compatibility	Use supported browser

12.1 Getting Help

If you encounter persistent issues:

5. Note the workflow name and reference number (if any)
6. Take a screenshot of any error messages
7. Contact your system administrator with details
8. Provide steps to reproduce the issue