# My Submissions Module

User Manual - Console Interface

SONARWORKS WORKFLOW SYSTEM

Version 1.1

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# 1. Introduction

The My Submissions module is your personal dashboard for tracking all workflows you have initiated. It provides a centralized view of your submissions across all workflow types, allowing you to monitor their progress through the approval process.

**What You Can Do:**

- View all your workflow submissions in one place
- Track approval status in real-time
- Filter and search your submissions
- Continue working on draft submissions
- Recall pending submissions for edits
- Cancel submissions when no longer needed
- View complete approval history

*[Screenshot: My Submissions Overview]*

*Figure: My Submissions Overview*

# 2. Accessing My Submissions

## 2.1 From Navigation Menu

**Steps:**

**Step 1:** Log in to the Sonar Workflow System

**Step 2:** Click 'My Submissions' in the navigation sidebar

**Step 3:** The My Submissions list page displays

## 2.2 From Dashboard

**Steps:**

**Step 1:** On the Dashboard, locate 'My Submissions' or 'Drafts' card

**Step 2:** Click on the count or 'View All' link

**Step 3:** You are directed to My Submissions with relevant filter applied

*[Screenshot: Navigation to My Submissions]*

*Figure: Navigation to My Submissions*

# 3. Understanding the Submissions List

## 3.1 List Columns

| Column | Description |
|---|---|
| Reference No. | Unique submission identifier (e.g., WF-2024-00123) |
| Workflow | Name of the workflow type |
| Status | Current status (Draft, Pending, Approved, Rejected, etc.) |
| Amount | Total amount for financial workflows |
| Submitted | Date and time of submission |
| Current Approver | Person currently reviewing (if pending) |
| SBU | Strategic Business Unit |
| Actions | Quick action buttons |

*[Screenshot: My Submissions List Table]*

*Figure: My Submissions List Table*

## 3.2 Status Indicators

Each submission displays a color-coded status badge:

| Status | Color | Meaning | Actions Available |
|---|---|---|---|
| Draft | Gray | Not yet submitted | Edit, Delete |
| Pending | Yellow | Awaiting approval | View, Recall |
| Approved | Green | Fully approved | View only |
| Rejected | Red | Rejected by approver | View only |
| Escalated | Purple | Escalated to higher authority | View, Recall |
| On Hold | Blue | Temporarily paused | View |
| Cancelled | Gray | Cancelled by initiator | View only |
| Recalled | Orange | Recalled for editing | Edit, Submit |

## 3.3 Sorting the List

Click on column headers to sort:

- Single click: Sort ascending
- Double click: Sort descending
- Default: Sorted by submission date (newest first)

# 4. Filtering and Searching

## 4.1 Quick Filters

Use the filter tabs/buttons at the top to quickly show:

| Filter Tab | Shows |
|---|---|
| All | All your submissions |
| Pending | Submissions awaiting approval |
| Approved | Approved submissions |
| Rejected | Rejected submissions |
| Drafts | Incomplete draft submissions |

## 4.2 Advanced Filters

Click 'Filters' or the filter icon to access advanced options:

| Filter | Description |
|---|---|
| Workflow Type | Filter by specific workflow |
| Status | Multiple status selection |
| Date Range | Submissions within date range |
| Amount Range | Filter by amount (min/max) |
| SBU | Filter by business unit |

**Using Advanced Filters:**

**Step 1:** Click 'Filters' button to open filter panel

**Step 2:** Select or enter filter criteria

**Step 3:** Click 'Apply' to filter the list

**Step 4:** Click 'Clear' to remove all filters

## 4.3 Search

Use the search box to find submissions by:

- Reference number
- Workflow name
- Field values (if searchable fields configured)

*[Screenshot: Filter and Search Controls]*

*Figure: Filter and Search Controls*

# 5. Viewing Submission Details

## 5.1 Opening a Submission

**Steps:**

**Step 1:** Locate the submission in the list

**Step 2:** Click on the row or the 'View' action button

**Step 3:** The submission detail page opens

### 5.2 Detail Page Sections

| Section | Contents |
|---|---|
| Header | Reference number, workflow name, status, action buttons |
| Summary | Key information: submitted date, amount, SBU, current approver |
| Form Data | All submitted field values organized by groups |
| Attachments | Uploaded files with download links |
| Approval History | Complete timeline of all actions |

*[Screenshot: Submission Detail Page]*

*Figure: Submission Detail Page*

### 5.3 Form Data Display

The Form Data section shows all information you submitted:

- Fields are organized by their form groups
- Groups can be expanded/collapsed
- Both field labels and values are displayed
- File attachments are linked for download

## 6. Tracking Approval Progress

### 6.1 Approval Status Overview

The submission detail shows where your workflow is in the approval process:

- Current Status: Overall workflow status
- Current Approver: Who needs to act next
- Approval Level: What level in the hierarchy (Level 1, 2, etc.)

### 6.2 Reading the Approval History

The Approval History shows a chronological timeline of all actions:

**Example: Approval History Example**

*[2024-01-15 09:00] SUBMITTED by John Doe*
*"Initial submission for Q1 budget"*

*[2024-01-15 14:30] APPROVED by Jane Smith (Level 1)*
*"Verified against budget allocation. Approved."*

*[2024-01-16 10:15] APPROVED by Mike Johnson (Level 2)*
*"Final approval granted."*

*Status: APPROVED*

### 6.3 Understanding Pending State

When your submission is Pending:

- It is actively in the approval queue
- 'Current Approver' shows who needs to act
- You'll be notified when status changes
- You can recall if you need to make changes

*[Screenshot: Approval Progress Indicator]*

*Figure: Approval Progress Indicator*

## 7. Managing Drafts

### 7.1 What Are Drafts?

Drafts are incomplete submissions that haven't been submitted for approval yet. They:

- Have no reference number assigned
- Are visible only to you
- Can be edited unlimited times
- Don't enter the approval queue
- Persist until you submit or delete them

### 7.2 Finding Your Drafts

**Steps:**

**Step 1:** Go to My Submissions

**Step 2:** Click the 'Drafts' filter tab

**Step 3:** Or use status filter to select 'Draft'

### 7.3 Editing a Draft

**Steps:**

**Step 1:** Locate the draft in My Submissions

**Step 2:** Click on the draft or the 'Edit' action button

**Step 3:** The form opens with your saved data

**Step 4:** Make your changes

**Step 5:** Click 'Save Draft' to save or 'Submit' to finalize

### 7.4 Deleting a Draft

**Steps:**

**Step 1:** Locate the draft in My Submissions

**Step 2:** Click the 'Delete' action button (trash icon)

**Step 3:** Confirm the deletion

**Step 4:** The draft is permanently removed

> **WARNING:** Deleted drafts cannot be recovered. Make sure you want to discard the information.

*[Screenshot: Draft Management Options]*

*Figure: Draft Management Options*

## 8. Recalling Submissions

Recalling allows you to pull back a submitted workflow for editing before it's fully approved.

### 8.1 When You Can Recall

| Condition | Can Recall? |
|---|---|
| Status is Pending | Yes |
| Status is Escalated | Yes |
| Already approved at some level | Depends on configuration |
| Fully Approved | No |
| Rejected | No |
| Already Recalled | No (already recalled) |

### 8.2 How to Recall

**Steps:**

**Step 1:** Open the submission detail page

**Step 2:** Click the 'Recall' button

**Step 3:** Enter a recall reason (required)

**Step 4:** Click 'Confirm' to execute recall

**Step 5:** Status changes to 'Recalled'

### 8.3 After Recall

Once recalled:

- Submission is removed from approver queues
- Status changes to 'Recalled'
- You can edit the submission
- Previous approval progress is reset
- Resubmission starts the approval process fresh

### 8.4 Editing and Resubmitting

**Steps:**

**Step 1:** View your recalled submission

**Step 2:** Click 'Edit' to modify the form

**Step 3:** Make necessary corrections

**Step 4:** Click 'Submit' to resubmit

**Step 5:** Workflow re-enters approval queue at Level 1

> **NOTE:** Any previous approvals are voided when you recall. The workflow must be re-approved from the beginning.

## 9. Cancelling Submissions

If a workflow is no longer needed, you can cancel it (if the feature is enabled).

### 9.1 When You Can Cancel

- Workflow is in Draft status (use Delete instead)
- Workflow is Pending and not yet fully approved
- Cancel feature is enabled for the workflow

### 9.2 How to Cancel

**Steps:**

**Step 1:** Open the submission detail page

**Step 2:** Click the 'Cancel' button

**Step 3:** Enter a cancellation reason (required)

**Step 4:** Click 'Confirm' to cancel

**Step 5:** Status changes to 'Cancelled'

### 9.3 Cancel vs Recall

| Action | When to Use | Can Resume? |
|---|---|---|
| Recall | Need to make changes, will resubmit | Yes - can edit and resubmit |
| Cancel | No longer need the workflow | No - workflow ends permanently |

> **WARNING:** Cancelled workflows cannot be recovered or resubmitted. Use this only when you're certain the workflow is no longer needed.

## 10. Best Practices

### 10.1 Regular Monitoring

- Check My Submissions regularly for status updates
- Follow up on submissions that have been pending too long
- Complete or delete old drafts to keep your list organized

### 10.2 Draft Management

- Save drafts frequently when working on complex forms
- Don't let drafts accumulate - submit or delete them
- Use meaningful field values even in drafts for easy identification

### 10.3 Before Submitting

1. Review all entered information for accuracy
2. Ensure all required fields are completed
3. Attach all necessary supporting documents
4. Verify amounts and calculations
5. Double-check the workflow is the correct one

### 10.4 Communication

- If urgent, consider contacting the approver directly
- Provide clear context in your submission
- Respond promptly if approver has questions

- Add helpful comments in multi-level workflows

## 10.5 Troubleshooting

| Issue | Solution |
|---|---|
| Can't find my submission | Check filters, try 'All' tab, use search |
| Draft missing | May have been deleted, check trash if available |
| Can't recall | Check if already approved or recall is disabled |
| Status not updating | Refresh page, wait for approver action |
| Wrong workflow submitted | Recall and correct, or cancel and resubmit correct one |