

My Submissions Module

User Manual - Console Interface

SONARWORKS WORKFLOW SYSTEM

Version 1.0

Table of Contents

1. Introduction
2. Accessing My Submissions
3. Understanding the Submissions List
4. Filtering and Searching
5. Viewing Submission Details
6. Tracking Approval Progress
7. Managing Drafts
8. Recalling Submissions
9. Cancelling Submissions
10. Best Practices

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 Sonarworks 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