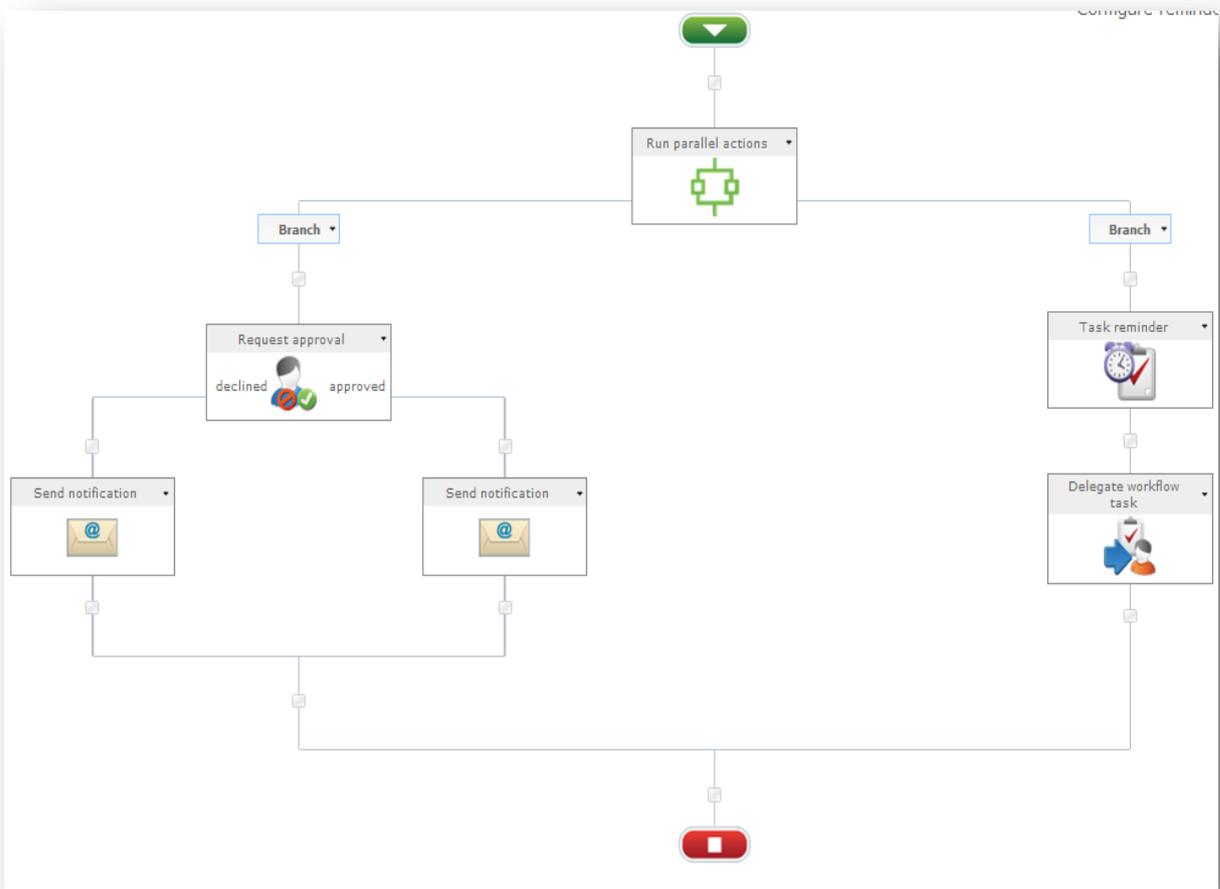


How to...

Configure reminders and escalate a workflow using delegation

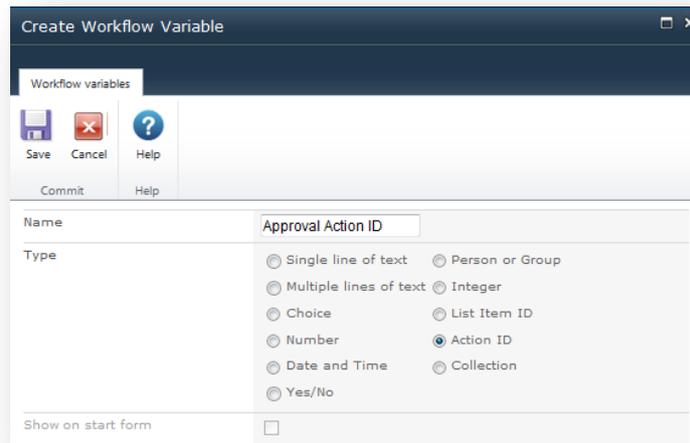
Method 1

The screenshot below shows the set of actions required to enable a timed escalation process. To summarize, the workflow will wait for a calculated duration (incorporating a number of reminders) before delegating the Approval task to another user.

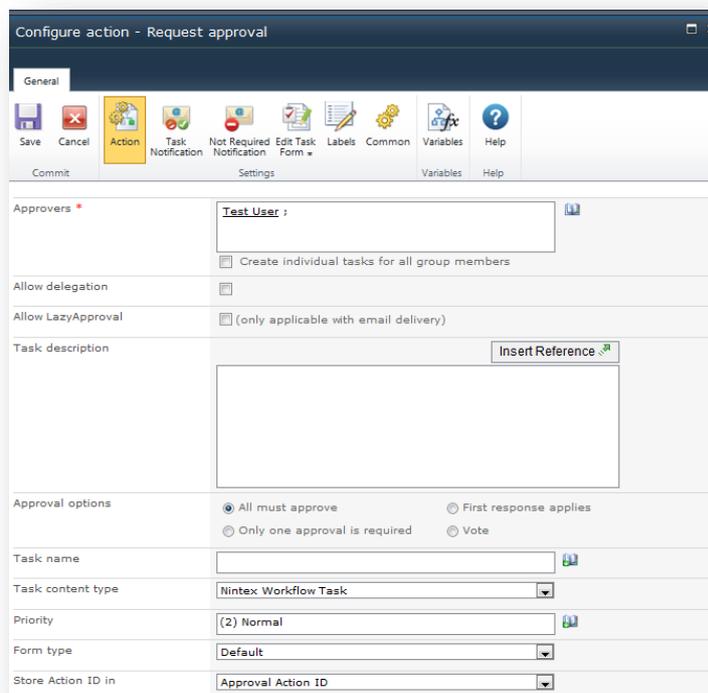


The first thing to do is to create a variable of type “Action ID”. Every “Request approval” action will generate a specific ID number which can be used to make reference to it. The variable we create will store the “Request Approval” action’s unique ID.

Please note: you would need a variable for each “Request approval” action in the workflow for which you wanted to apply reminders and/or delegation.



You can then add a “Request Approval” action to the workflow, add an approver or approvers then choose to store the Workflow Action’s unique ID in the variable we created earlier.



You can then drag a “Task Reminder” action onto the right branch of the workflow and configure it. From the Action ID drop-down, select the Action ID variable that corresponds with the “Request Approval” action for which you wish to apply the reminders. In this case, there is only one such action and variable, so the selection is easy. You can then set the number of reminders and the interval between them.

The screenshot displays the 'Configure action - Task reminder' dialog box. It features a 'General' tab and a toolbar with icons for Save, Cancel, Action, Labels, Common, Variables, and Help. Below the toolbar, the configuration fields are as follows:

- Action ID ***: A dropdown menu set to 'Approval Action ID'.
- Number of reminders ***: A text input field containing the number '2'.
- Time to reminder ***: Three input fields for 'Days' (1), 'Hours' (0), and 'Mins' (0).
- Time calculation**: Two checkboxes, 'During business days only' (checked) and 'During business hours only'.
- CC**: An empty text input field.
- From**: An empty text input field.
- Subject ***: A text input field containing 'REMINDER: Please review'.
- Attach file**: A checkbox that is currently unchecked.
- Rich Text**: A dropdown menu set to 'Rich Text' and an 'Insert Reference' button.
- Rich Text Content**: A text area containing the following text:
Dear Approver Name,
Please Review the following:
Item Url
- Delivery type ***: Three radio buttons for 'Email' (selected), 'IM', and 'User preference'.

If the “Request approval” action is completed in the time-frame set by the number of reminders and intervals, the workflow will continue out of the branched actions. If not, it will advance down the right branch to the “Delegate Workflow Task” action. Configure the delegation ensuring that you use the associated Action ID variable. You can then choose a user to whom to delegate the workflow task and insert whatever text and dynamically looked up information you require. The workflow will wait until the delegated workflow task has been completed before continuing with the rest of the workflow.

Configure action - Delegate workflow task

General

Save Cancel Action Labels Common Variables Help

Commit Settings Variables Help

Action ID * 1

Delegate after

Days: 0

Hours: 0

Mins: 0

Time calculation

During business days only

During business hours only

Delegate to * Test User

Comments

Insert Reference

Automatically delegated due to no response.

Apply to

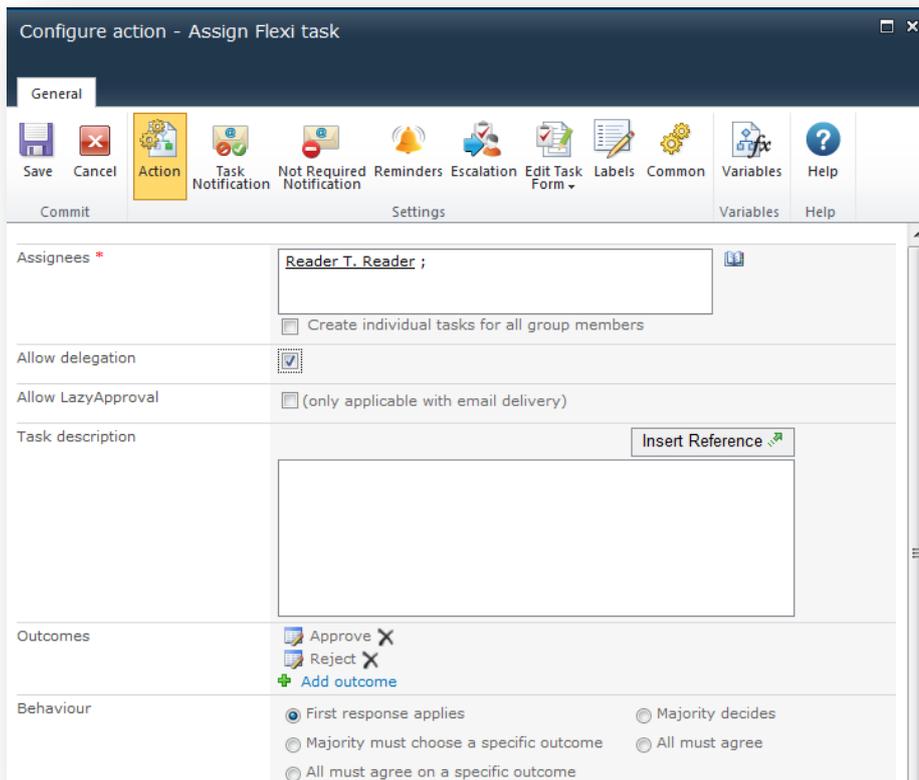
All pending tasks

First pending task (other pending tasks will be not required)

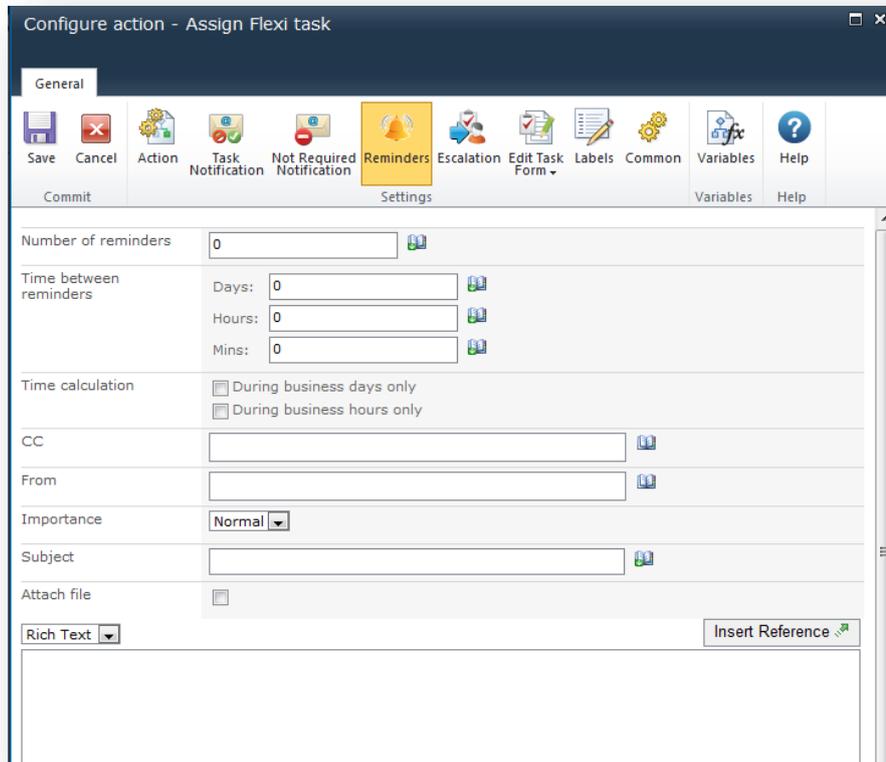
Method 2

Simply use a “Flexi task” action. The “Flexi task” action is a highly versatile, self-contained action that is similar to the “Request approval” action in that it allows you to request the approval of numerous users. It also allows you to create alternative outcomes without being bound to only “Approve” or “Reject”.

The “Flexi task” action has reminders, delegation and escalation built in. Drag a “Flexi task” action onto the design canvas, open the action’s configuration dialog and check the “Delegation” box.



To configure reminders, click the “Reminders” button in the action’s ribbon. There you can set the number of reminders you wish to be issued and the time between each one. It also allows you to customize the Reminder message that the users receive.



Similarly, click the “Escalation” button in the ribbon. You can choose to delegate the workflow task to another user or to complete the task.

