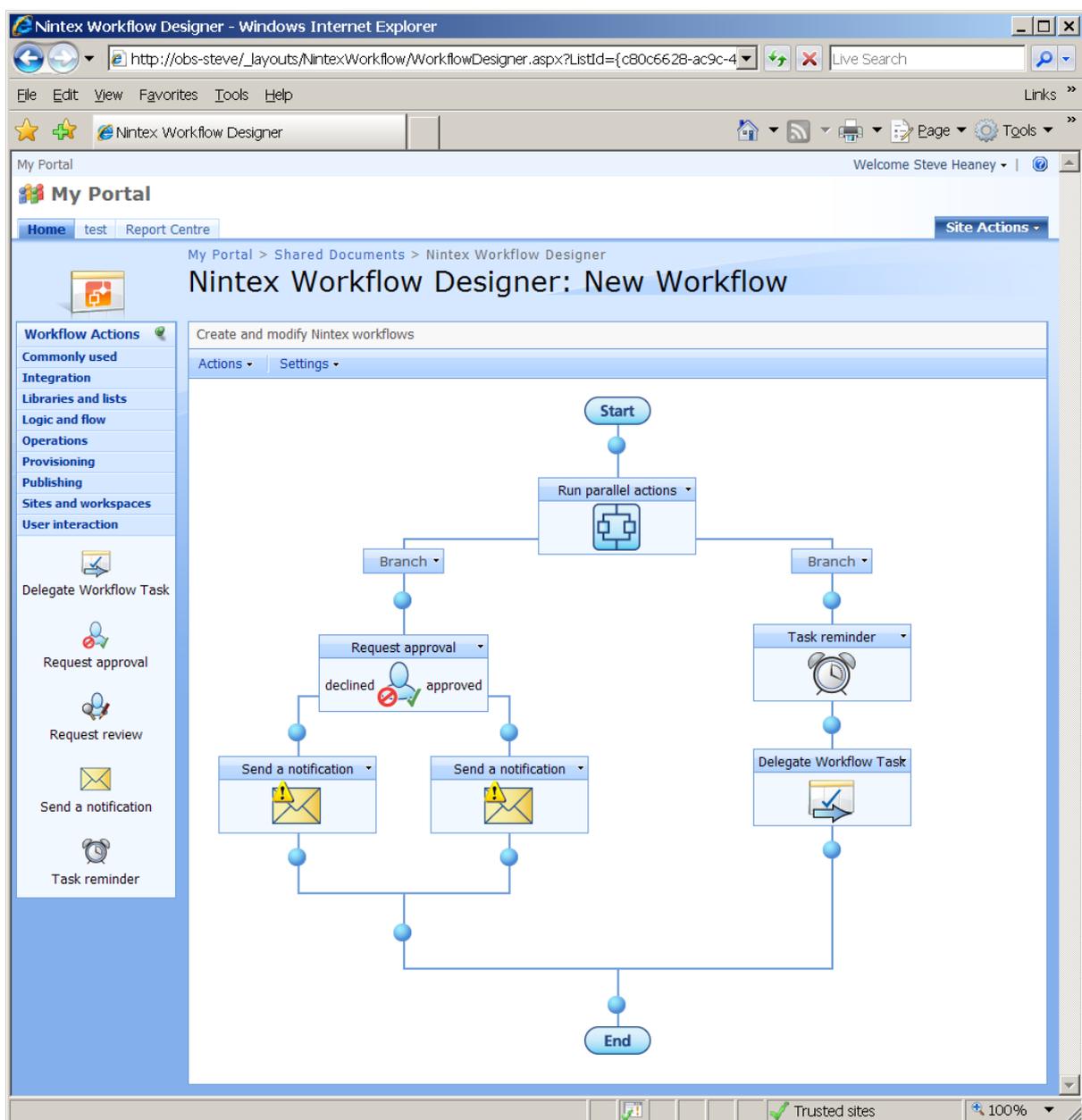


How to...

Configure reminders and escalate a workflow using delegation

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.

Workflow Data -- Webpage Dialog

Workflow Variables

Create New Variable

Name Approval Action ID

Type

- Text
- Date and Time
- Number
- Yes/No
- List Item ID
- Action ID

Create Cancel

10818

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.

Configure Action -- Webpage Dialog

Request approval

Approvers

Edit settings for

Allow Delegation

Allow LazyApproval (only applicable with email delivery)

Edit Approval Required Notification

Edit Approval No Longer Required Notification

Approval Options*

All must approve

Only one approval is required

First response applies

Vote

Task Name

Store Action ID in

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.

Configure Action -- Webpage Dialog

Task reminder

Action ID* Approval Action ID

Number of reminders* 2

Time between reminders*
 Days: 1 Hours: 0

Subject* REMINDER: Please review

Attach File

Format Rich Text

Dear Approver Name,

Please review the following:

Item Url

Delivery type* Email User preference

10818 Save Cancel

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.

The screenshot shows a software dialog box titled "Configure Action -- Webpage Dialog" with a close button (X) in the top right corner. Below the title bar, there is a sub-header "Delegate Workflow Task" with a help icon (question mark) on the right. The main content area is divided into three sections:

- Action ID***: A dropdown menu currently showing "Approval Action ID".
- Delegate to***: A text input field containing "Brian Cook" and a small user selection icon to its right.
- Comments**: A large text area containing the text "Automatically delegated due to no response." To the right of this text area is a button labeled "Insert Reference" with a small icon.

At the bottom left of the dialog, the number "10818" is displayed. At the bottom right, there are two buttons: "Save" and "Cancel".