Initiating and Completing a Workflow

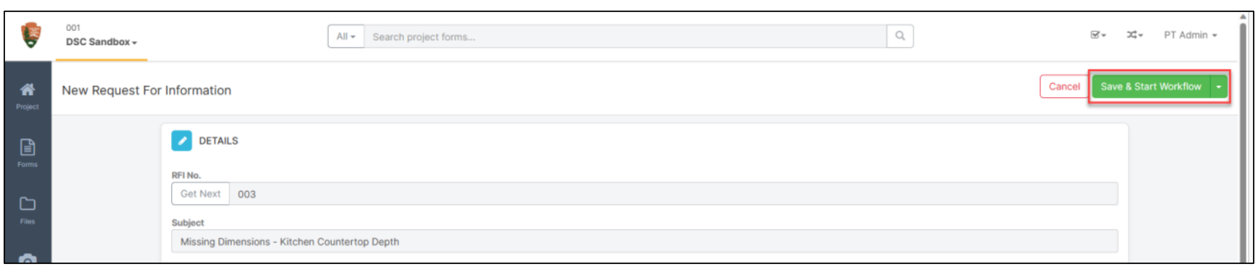
When a **Workflow** is available for a form type, a record can be sent through the step-by-step review process in which users are assigned responsibility to *take action* on their step. Upon being assigned a workflow step, the user gains access to the record and is sent a notification that action is pending.

This guide provides instructions for starting the workflow and responding when assigned a step.

Starting a Workflow

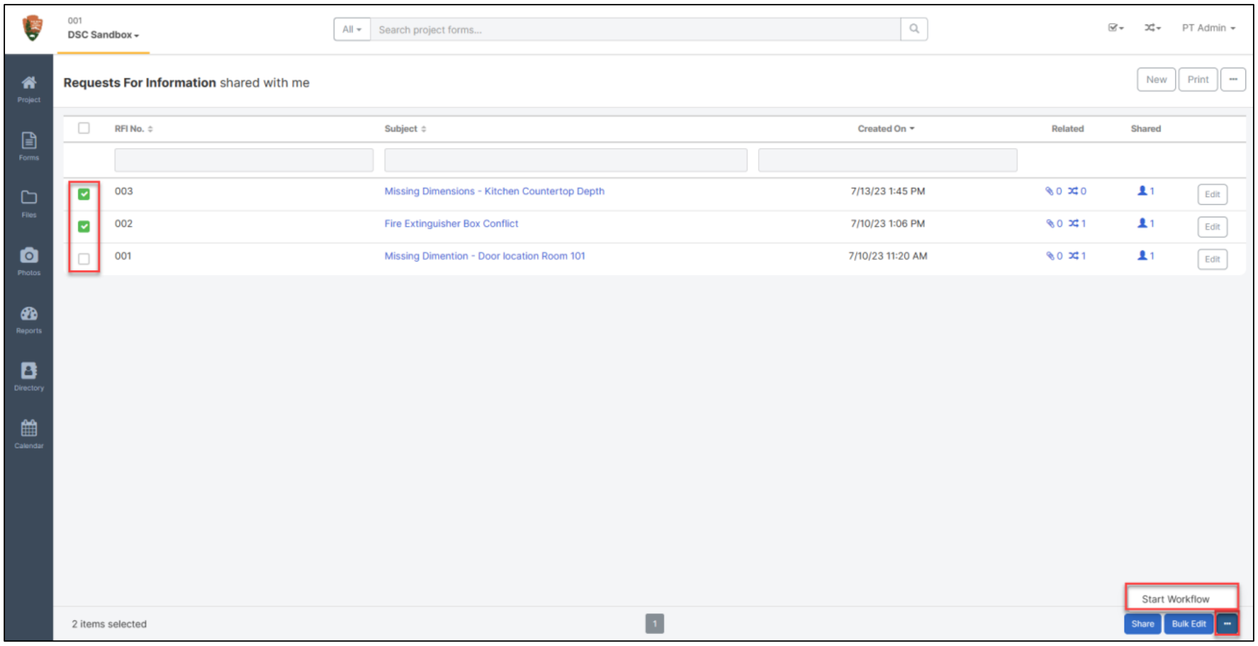
The details of a workflow are set up by a Project Administrator and include assignment of *Who Can Start* the workflow. The *Start new workflow* window allows users to select from a list of workflows the user has been assigned access to start.

1. Open the *Start new workflow* modal window:
   - *New Record*
     a. From the log view of a form type, click the **New** button to create a new record.
     b. Fill in the required fields of the document.
     c. Click **Save & Start Workflow**.



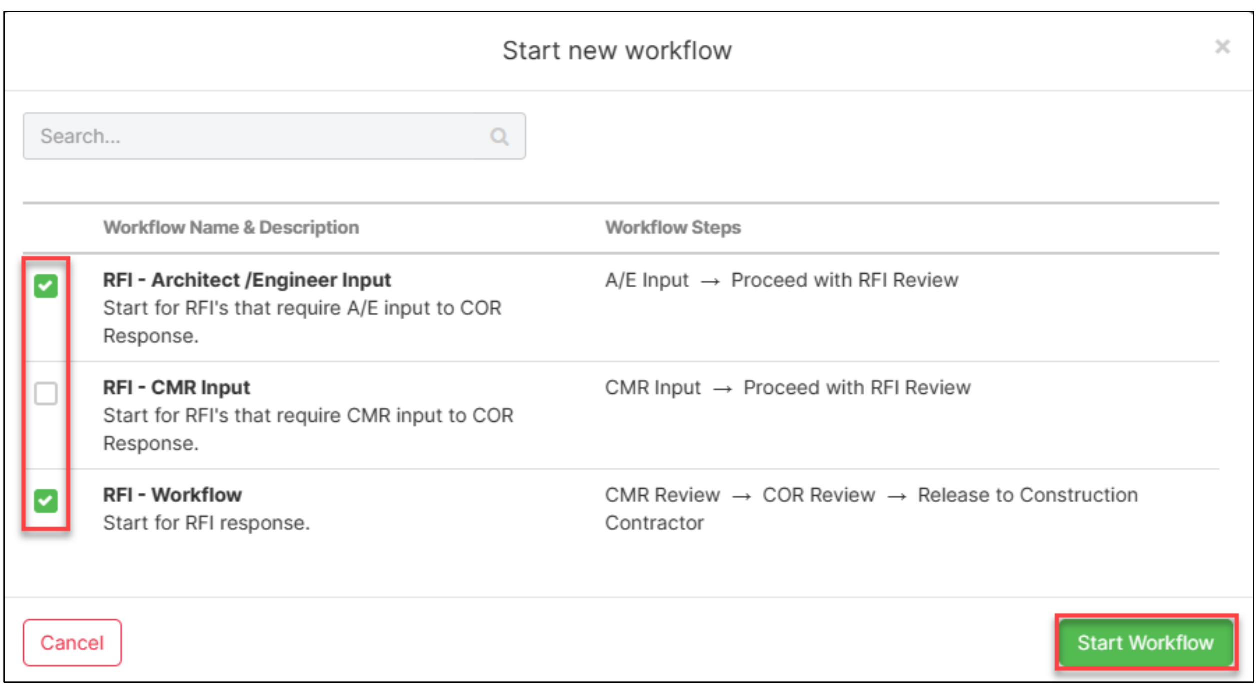
   - *Existing Record*
     a. From the log view of a form type, open the record.
     b. Click **Start New** from the *Workflows* section.

- *Multiple Records from the Log View*
    a. Select one or more of the Workflows that appear in the *Start new workflow* window.
    b. Click **Start Workflow** to send the workflow(s) to the user(s) in the first step.



2. In the *Start new workflow* window, check the box beside the workflow(s) to start.

3. Click **Start Workflow**.



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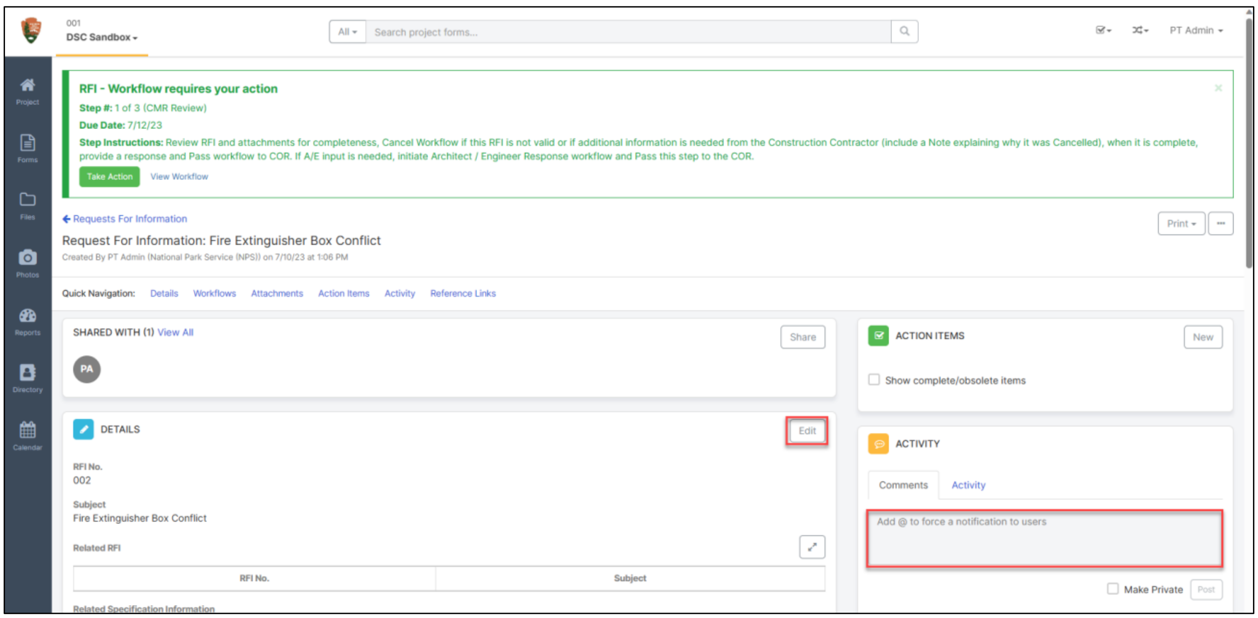
Responding to a Workflow Step

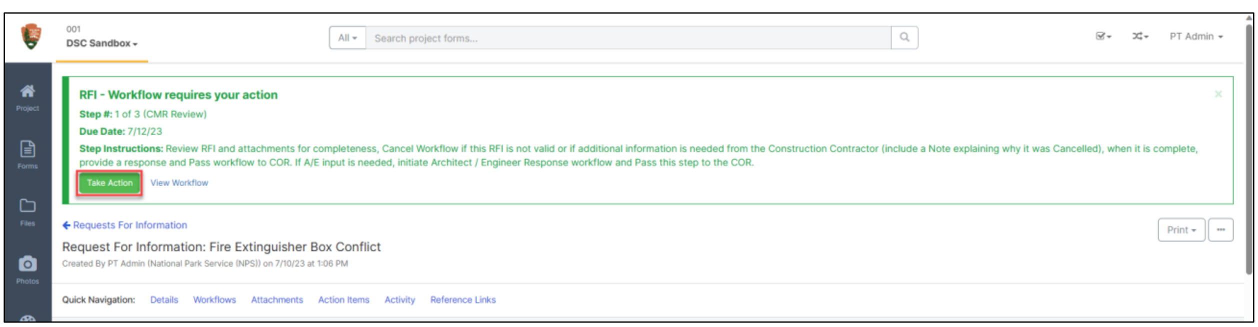
The Project Administration Details of a workflow determine who is responsible for each step, how long they have to respond and, if there are multiple people in the step, if one person or everyone needs to respond to move the workflow to the next step.

Upon being assigned a step in a workflow, users gain access to the record and will receive an email notification with a link to the record.

1. Access the record from the link in the emailed notification or by opening ProjectTeam and navigating to the record.
2. Review the record and supporting documentation.
3. **Edit** and/or make necessary **Comments**.



4. Click on the green **Take Action** button from the top or in the *Workflows* section.



5. Choose **Pass** or **Fail**
   a. If it is the first step, you will **Cancel** instead of Fail. Cancel ends the workflow and it can be restarted by someone with access to do so.
6. Enter **Notes**.
7. Click the green **Take Action** on the bottom of window.

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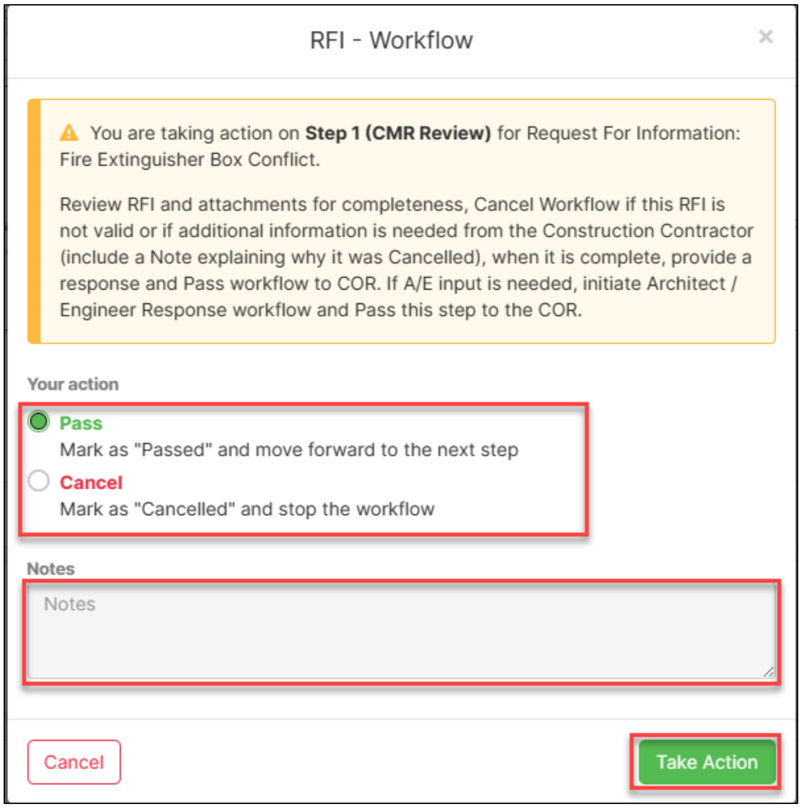
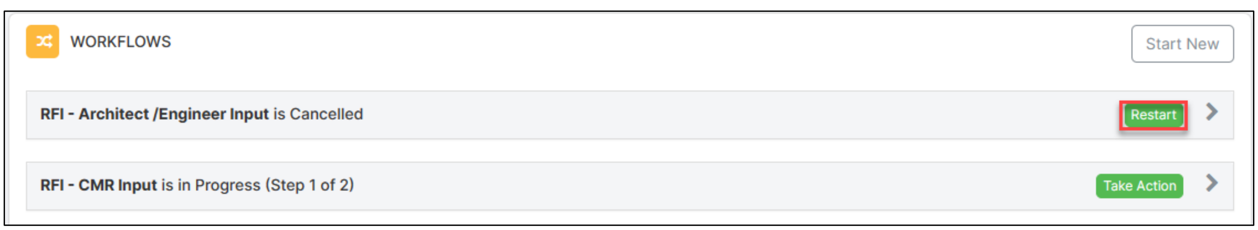


8. You will still have access to the record and will be able to see where the record is in the Workflow process.

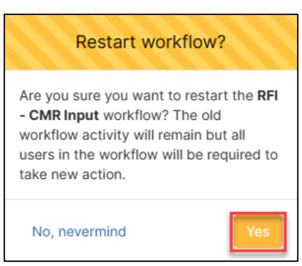
Restarting a Workflow

If the workflow is Complete or Cancelled, (see 5a. of the Responding to a Workflow Step) and you have access to Start the Workflow, you can restart the workflow to send it to the first step again.

1. With the record open, click the green **Restart** button from the right side of the cancelled workflow in the *Workflows* section.



2. Select **Yes** from the *Restart workflow?* window.



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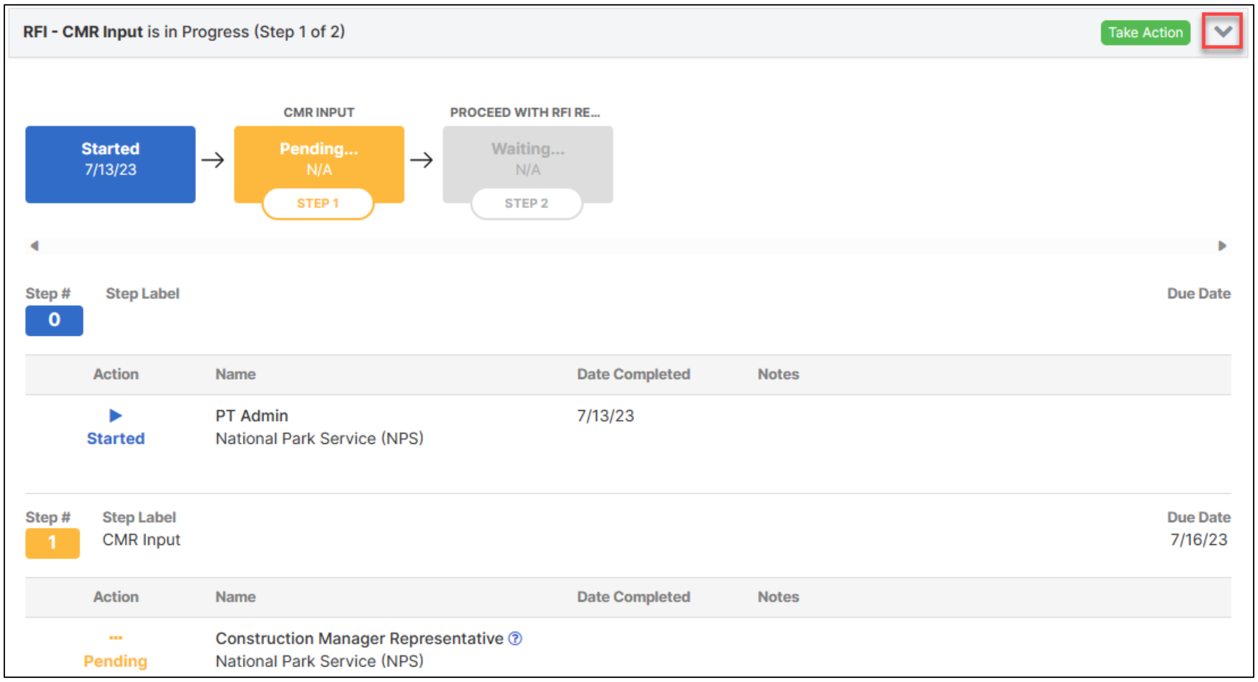
View Workflow

Once a user has been assigned a step in the workflow, the record is then shared with them. They can see where the record is in the workflow by clicking the down arrow on the right side of the workflow name in the *Workflows* section.



Related Resources

- **Help Center Links**
  - [Start a workflow on a document (projectteam.com)]()
- **QRG and Training Videos**
  - Project Directory
  - Sharing Records
  - Creating RFIs
  - Responding to RFIs
  - Creating Submittals
  - Reviewing Submittals
  - Creating Drawings and Packages
  - Creating Meeting Minutes
  - Creating Daily Reports
  - Creating Punchlists

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