



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 Responding to a Workflow Step Restarting a Workflow View Workflow Related Resources

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.

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A Project	New Request For	Information	Cancel Save & Start Workflow -
Forms		DETAILS RFI No.	
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- Existing Record
 - a. From the log view of a form type, open the record.
 - b. Click **Start New** from the *Workflows* section.

× WORKFLOWS

Start New

- 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.

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A Project	Reques	sts For Information shared with me						New Print
Forms		RFI No. ¢		Subject ¢	Created On 👻	Related	S	ared
c		003		Missing Dimensions - Kitchen Countertop Depth	7/13/23 1:45 PM	% 0 ≭0		L1 Edit
Files		002		Fire Extinguisher Box Conflict	7/10/23 1:06 PM	⊛0 2 ⊄1		L 1 Edit
Photos		001		Missing Dimention - Door location Room 101	7/10/23 11:20 AM	% 0 ≭1		E 1 Edit
Reports Directory								
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	2 items	selected		8			s	are Bulk Edit

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

Start new workflow						
Sea	rchQ					
	Workflow Name & Description	Workflow Steps				
	RFI - Architect /Engineer Input Start for RFI's that require A/E input to COR Response.	A/E Input \rightarrow Proceed with RFI Review				
	RFI - CMR Input Start for RFI's that require CMR input to COR Response.	CMR Input \rightarrow Proceed with RFI Review				
	RFI - Workflow Start for RFI response.	CMR Review \rightarrow COR Review \rightarrow Release to Construction Contractor				
Can	icel	Start Workflow				

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.

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Project Forms			rkflow if this RFI is not valid or if additional information is needed from Architect / Engineer Response workflow and Pass this step to the COR		ractor (include a Note explaining why it was Cance	tled), when it is c	×
Files	Requests For Information Request For Information: Fire Extinguisher Box Created By PT Admin (National Park Service (NPS)) on 7/10/23 at 10						Print •
B	Quick Navigation: Details Workflows Attachments Ac	ction Items Activity I	Reference Links				
Reports	SHARED WITH (1) View All			Share	ACTION ITEMS		New
Directory	PA				Show complete/obsolete items		
Calendar	DETAILS			Edit			
	RFI No. 002				Comments Activity		
	Subject Fire Extinguisher Box Conflict Related RFI			~	Add @ to force a notification to users		
	RFI No.		Subject		L	Make P	rivate Post
	Related Specification Information						

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

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Project Forms		mpleteness, Cancel Workflow if this RFI is not valid or if ad nput is needed, initiate Architect / Engineer Response wor	ntractor (include a Note explaining w	hy it was Cancelled), wh	en it is co	x	C
Files	Requests For Information Request For Information: Fire Extinguisher Bo Created By PT Admin (National Park Service (NPSI) on 7/10/23 at 14				(Print +	-
6	Quick Navigation: Details Workflows Attachments Av	ction Items Activity Reference Links					

- 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.

RFI - Workflow
▲ You are taking action on Step 1 (CMR Review) for Request For Information: Fire Extinguisher Box Conflict. Review RFI and attachments for completeness, Cancel Workflow if this RFI is not valid or if additional information is needed from the Construction Contractor (include a Note explaining why it was Cancelled), when it is complete, provide a response and Pass workflow to COR. If A/E input is needed, initiate Architect / Engineer Response workflow and Pass this step to the COR.
Your action Pass Mark as "Passed" and move forward to the next step Cancel Mark as "Cancelled" and stop the workflow
Notes
Cancel Take Action

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.



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.

RFI - C	MR Input i s in Pr	ogress (Step 1 of 2)			Take Action
	Started 7/13/23	→ Pending N/A STEP 1	Waiting N/A STEP 2		
<pre>Step # 0</pre>	Step Label				► Due Date
	Action	Name	Date Completed	Notes	
	► Started	PT Admin National Park Service (NPS)	7/13/23		
Step #	Step Label CMR Input				Due Date 7/16/23
	Action	Name	Date Completed	Notes	
	 Pending	Construction Manager Represent National Park Service (NPS)	ative 🔊		

Related Resources

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