

IMPACT Database - WORKFLOW User Guide (Integrated, Management, Planning and Control Tool)

HOW TO USE WORKFLOW

If you have issues logging into the workflow, please contact kathy@fnal.gov to get access.

Subject Matter Expert (SME) reviewers and approvers receive an automatic email from IMPACT indicating they have an item to address in workflow. The email provides a direct link to the workflow system. IMPACT also contains a direct link to the workflow system in the left side navigation called “[Workflow](#)”.

Revision History

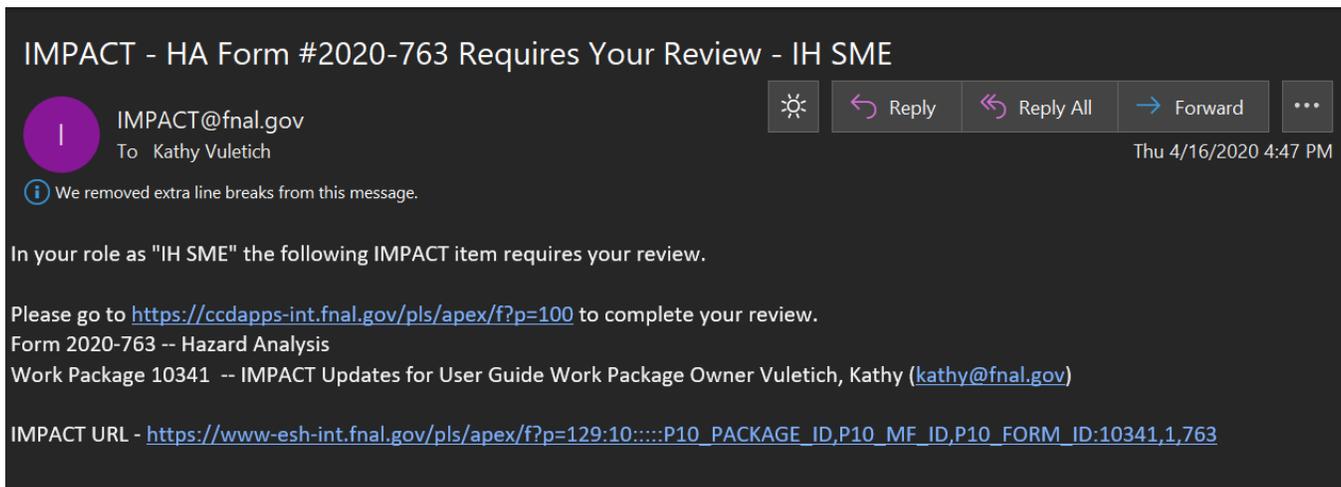
Name	Description	Date
Kathy Vuletich	Updated automatic emails received from IMPACT.	April 2020
Kathy Vuletich	Changed reference from supervisor to Authorizing Supervisor.	December 2019
Kathy Vuletich	Initial Release	September 2019

CLICK ON A TOPIC

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RESPONDING TO WORKFLOW NOTIFICATIONS - SME

You will receive an email from the IMPACT system if action is required of you in the workflow portion of the tool. The email you receive will look like the example below.



IMPACT - HA Form #2020-763 Requires Your Review - IH SME

IMPACT@fnal.gov
 To: Kathy Vuletich

Thu 4/16/2020 4:47 PM

We removed extra line breaks from this message.

In your role as "IH SME" the following IMPACT item requires your review.

Please go to <https://ccdapps-int.fnal.gov/pls/apex/f?p=100> to complete your review.
 Form 2020-763 -- Hazard Analysis
 Work Package 10341 -- IMPACT Updates for User Guide Work Package Owner Vuletich, Kathy (kathy@fnal.gov)

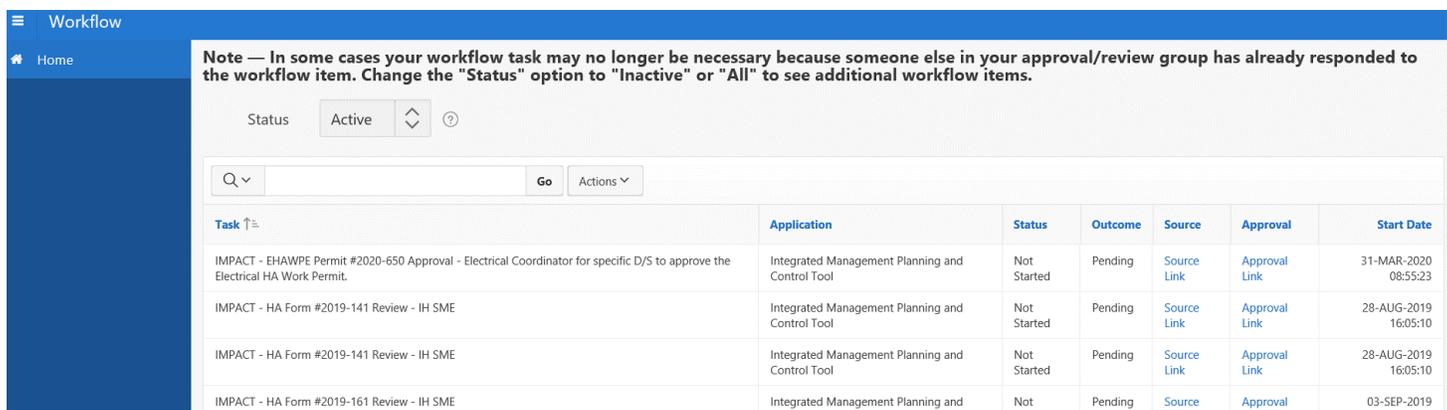
IMPACT URL - https://www-esh-int.fnal.gov/pls/apex/f?p=129:10:::P10_PACKAGE_ID,P10_MF_ID,P10_FORM_ID:10341,1,763

The email contains two links.

1. Link to the Workflow tool
2. Link to the item in IMPACT which you are required to review

Follow the instructions below to address your workflow item.

1. Open the email and click on the first link in the email.
2. Your browser will open, and you will be taken to the workflow que.

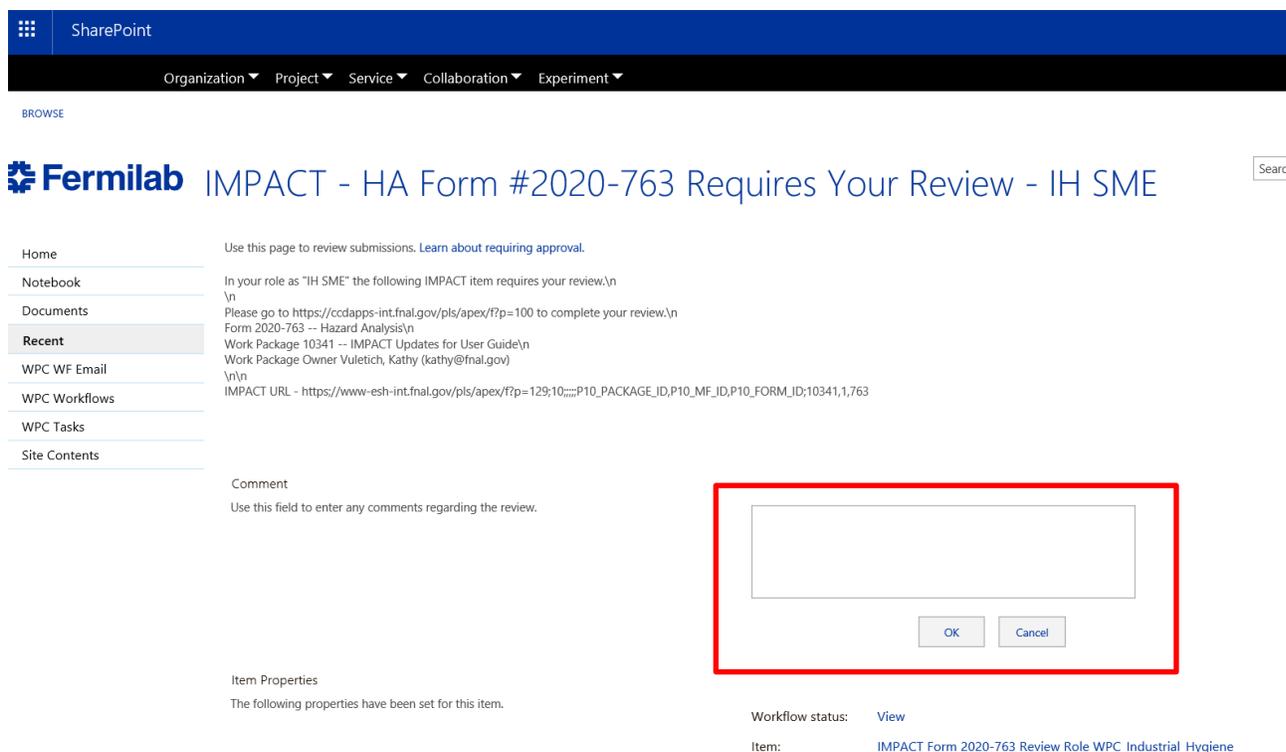


Note — In some cases your workflow task may no longer be necessary because someone else in your approval/review group has already responded to the workflow item. Change the "Status" option to "Inactive" or "All" to see additional workflow items.

Status: Active

Task ↑	Application	Status	Outcome	Source	Approval	Start Date
IMPACT - EHAWPE Permit #2020-650 Approval - Electrical Coordinator for specific D/S to approve the Electrical HA Work Permit.	Integrated Management Planning and Control Tool	Not Started	Pending	Source Link	Approval Link	31-MAR-2020 08:55:23
IMPACT - HA Form #2019-141 Review - IH SME	Integrated Management Planning and Control Tool	Not Started	Pending	Source Link	Approval Link	28-AUG-2019 16:05:10
IMPACT - HA Form #2019-141 Review - IH SME	Integrated Management Planning and Control Tool	Not Started	Pending	Source Link	Approval Link	28-AUG-2019 16:05:10
IMPACT - HA Form #2019-161 Review - IH SME	Integrated Management Planning and Control Tool	Not Started	Pending	Source Link	Approval Link	03-SEP-2019 16:05:10

3. The list that appears corresponds to the workflow items you need to address.
 - a. Task – The task column indicates what form you are required to review, and what role you are reviewing that form for.
 - b. Status – Current status of the workflow item. A status of “Not Started” indicates you need to address the item.
 - c. Outcome – The actual outcome of the workflow item. A status of “Pending” indicates the workflow item has not yet been addressed.
 - d. Source – Clicking on the source link will take you to the IMPACT system to view the form that you must address in the workflow.
 - e. Approval – Clicking on the approval link will take you to the workflow tool. See the next step.
 - f. Start Date – Timestamp indicating when the item was submitted to workflow.
4. When you are ready to address your item, click on the “[Approval Link](#)” associated with the form and role you are addressing.
5. A new browser window will open, and the following screen appears.



SharePoint

Organization ▾ Project ▾ Service ▾ Collaboration ▾ Experiment ▾

BROWSE

Fermilab IMPACT - HA Form #2020-763 Requires Your Review - IH SME Search

Home Use this page to review submissions. [Learn about requiring approval.](#)

Notebook In your role as "IH SME" the following IMPACT item requires your review:\n

Documents \n

Recent Please go to <https://ccdapps-int.fnal.gov/pls/apex/?p=100> to complete your review.\n

WPC WF Email Form 2020-763 -- Hazard Analysis\n

WPC Workflows Work Package 10341 -- IMPACT Updates for User Guide\n

WPC Tasks Work Package Owner Vuletech, Kathy (kathy@fnal.gov)\n

Site Contents \n\n

IMPACT URL - https://www-esh-int.fnal.gov/pls/apex/?p=125;10;;;P10_PACKAGE_ID,P10_MF_ID,P10_FORM_ID;10341,1,763

Comment

Use this field to enter any comments regarding the review.

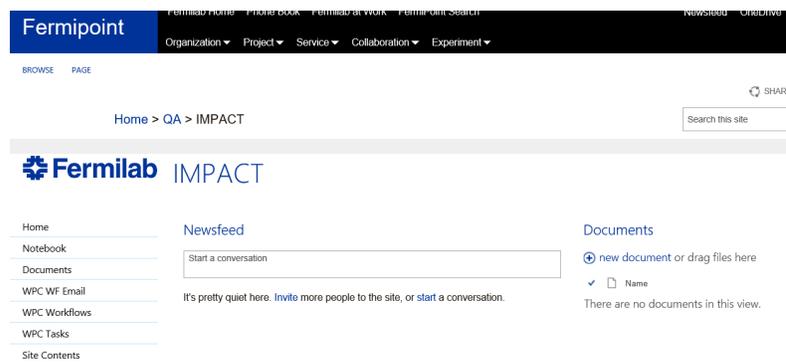
Item Properties

The following properties have been set for this item.

Workflow status: [View](#)

Item: [IMPACT Form 2020-763 Review Role WPC Industrial Hygiene](#)

6. As an SME you enter comments into the text field.
7. When you are finished click “OK” and the following screen appears.
 - a. By entering comments and clicking OK, you are acknowledging you have reviewed the submitted form as an SME and you are now aware of the work and hazards going to take place.



8. Your action is now complete, and the item is removed from your list of workflow items to address.
9. Any comments you added into the workflow will be provided to the submitter for consideration. They will receive an email like the one below.

-----Original Message-----
From: NO-REPLY-ESHQ@fnal.gov <NO-REPLY-ESHQ@fnal.gov>
Sent: Wednesday, April 8, 2020 8:47 AM
To: Kathy Vuletich <kathy@fnal.gov>
Cc: Matthew Arena <arenam@fnal.gov>
Subject: IMPACT - 2020-943 Hazard Analysis - testing emails for everything! Reviewed

Dear Eric Schlatter,

"Hazard Analysis - testing emails for everything!" was reviewed for IMPACT Work Package #10702 "Testing email content". The work is scheduled from 30-APR-20 to 30-APR-20.

The TM/CC/SC/Work Planner is: Eric Schlatter

IMPACT URL: https://www-esh-dev.fnal.gov/pls/cert/wpc.reports.prt_form?fid=943

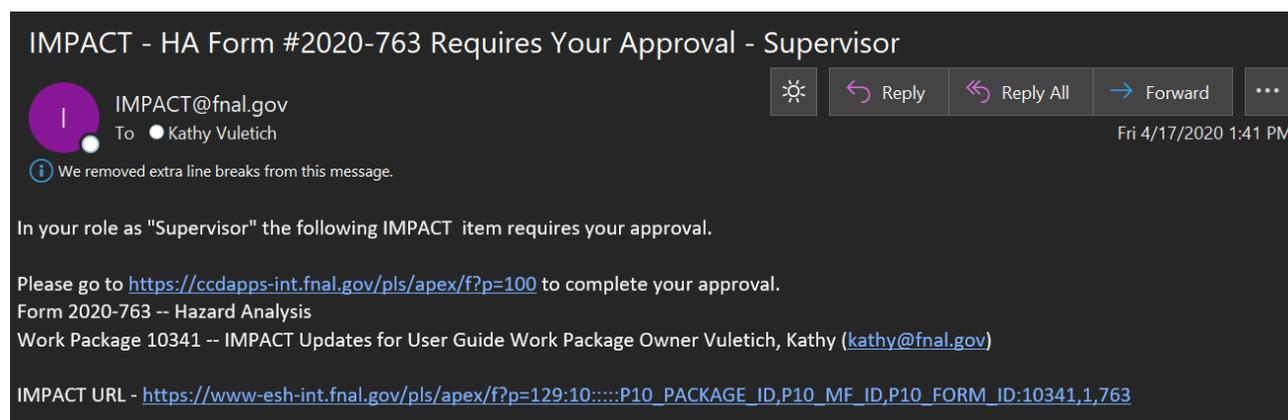
Comments
Reviewed by Vuletich, Kathy [Industrial Hygiene Oversight] Comments you enter will show up here and are sent to the SME.

For any issues, concerns or questions, please contact the service desk at <http://servicedesk.fnal.gov>

RESPONDING TO WORKFLOW NOTIFICATIONS – AUTHORIZING SUPERVISOR

As an authorizing supervisor, you are required to review and Approve or Reject HAs submitted by your team.

You will receive an email from the IMPACT system if action is required of you in the workflow portion of the tool. The email you receive will look like the example below.

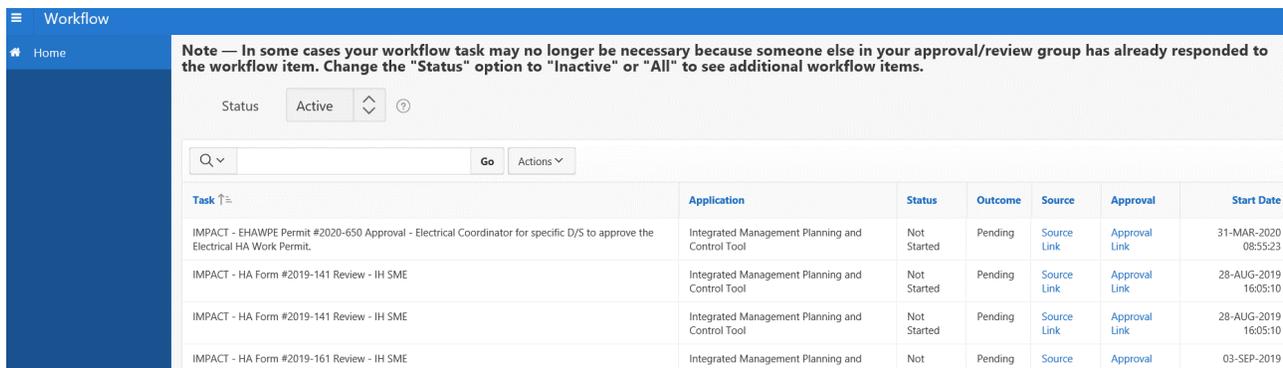


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2. Link to the item in IMPACT which you are required to review

Follow the instructions below to address your workflow item.

1. Open the email and click on the first link in the email.
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Workflow

Home

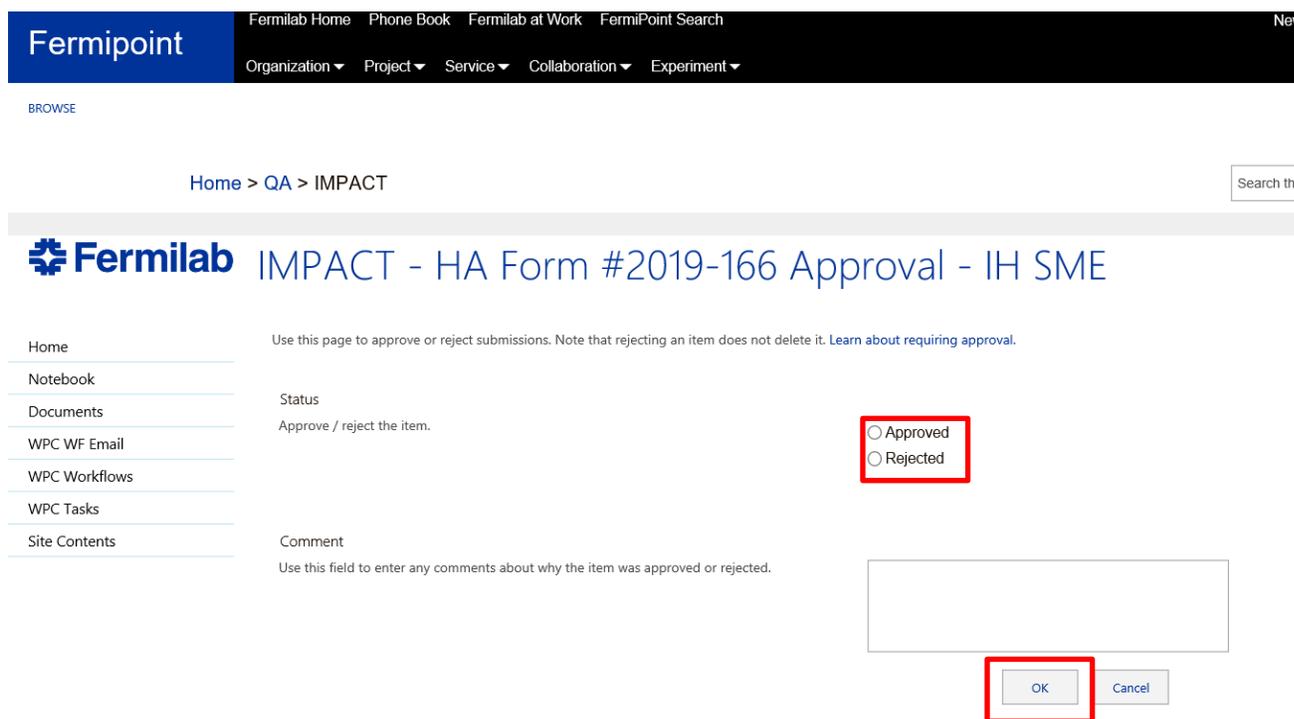
Note — In some cases your workflow task may no longer be necessary because someone else in your approval/review group has already responded to the workflow item. Change the "Status" option to "Inactive" or "All" to see additional workflow items.

Status: Active

Search: Go Actions

Task	Application	Status	Outcome	Source	Approval	Start Date
IMPACT - EHAWPE Permit #2020-650 Approval - Electrical Coordinator for specific D/S to approve the Electrical HA Work Permit.	Integrated Management Planning and Control Tool	Not Started	Pending	Source Link	Approval Link	31-MAR-2020 08:55:23
IMPACT - HA Form #2019-141 Review - IH SME	Integrated Management Planning and Control Tool	Not Started	Pending	Source Link	Approval Link	28-AUG-2019 16:05:10
IMPACT - HA Form #2019-141 Review - IH SME	Integrated Management Planning and Control Tool	Not Started	Pending	Source Link	Approval Link	28-AUG-2019 16:05:10
IMPACT - HA Form #2019-161 Review - IH SME	Integrated Management Planning and Control Tool	Not Started	Pending	Source Link	Approval Link	03-SEP-2019 16:05:10

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 - e. Approval – Clicking on the approval link will take you to the workflow tool. See the next step.
 - f. Start Date – Timestamp indicating when the item was submitted to workflow.
4. When you are ready to address your item, click on the “[Approval Link](#)” associated with the form and role you are addressing.
5. A new browser window will open, and the following screen appears.



Fermilab Home Phone Book Fermilab at Work FermiPoint Search

Fermipoint

Organization Project Service Collaboration Experiment

BROWSE

Home > QA > IMPACT

Search this page

Fermilab IMPACT - HA Form #2019-166 Approval - IH SME

Home

Notebook

Documents

WPC WF Email

WPC Workflows

WPC Tasks

Site Contents

Status

Approve / reject the item.

Comment

Use this field to enter any comments about why the item was approved or rejected.

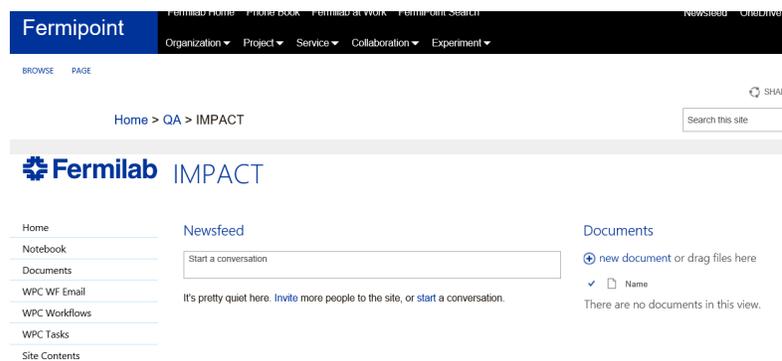
Use this page to approve or reject submissions. Note that rejecting an item does not delete it. [Learn about requiring approval.](#)

Approved

Rejected

OK Cancel

6. Click on the “[Approved](#)” or “[Rejected](#)” button.
7. Add comments in the “[Comment](#)” field if applicable.
8. When you are finished click “[OK](#)” and the following screen appears.
 - a. By Approving or Rejecting, you are acknowledging you have reviewed the submitted form as a Supervisor and work authorizer, and you are now aware of the work and hazards going to take place.



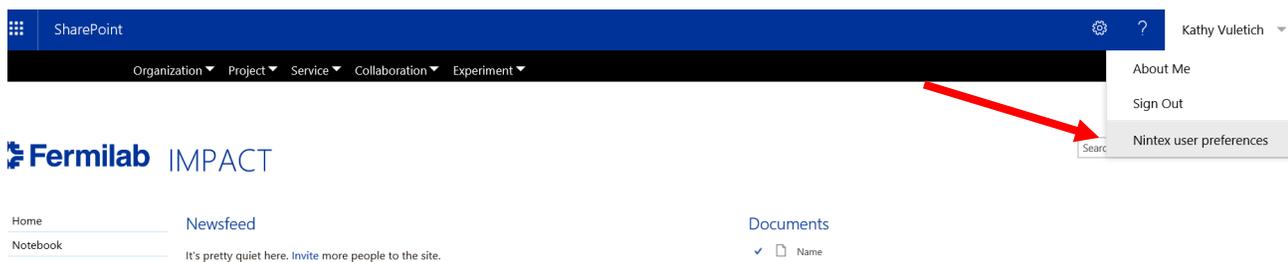
9. Your action is now complete, and the item is removed from your list of workflow items to address.
10. Any comments you added into the workflow will be provided to the submitter for consideration.
11. An email will be sent to the submitter alerting them of the outcome of your review.

HOW TO DELEGATE WORKFLOW REVIEWS & APPROVALS

For SMEs and Authorizing Supervisors, you may need to delegate workflow reviews and approvals/rejections if you are going to be out of the office for any reason.

Follow the instructions below on how to delegate your review and approval responsibilities to another person.

1. Go to SharePoint and click on [your name](#) in the upper right corner.
2. Click on “[Nintex user preferences](#)”.



3. Click on “[Delegate tasks to a user between specific dates](#)”.

Nintex Workflow for SharePoint 2019

User Preferences



Nintex notification preferences

Business hours notification preference

After hours notification preference

Nintex task delegation

[Delegate tasks to a user between specific dates](#)

Start date	End date	Applies to	Tasks delegated to
9/17/2019	9/18/2019	All sites	Kris Brandt

4. Add the start date to begin the delegation by clicking the calendar for “From the beginning of”.
5. Add the end date to end the delegation by clicking the calendar for “Until the end of”.
6. Add the person to delegate to by clicking on the phone book icon for “Delegate to”.
 - a. Enter the last name of the person in the “Find” field, then press enter.
 - b. Highlight and select the person to delegate to in the search list.
 - c. Click “OK”.

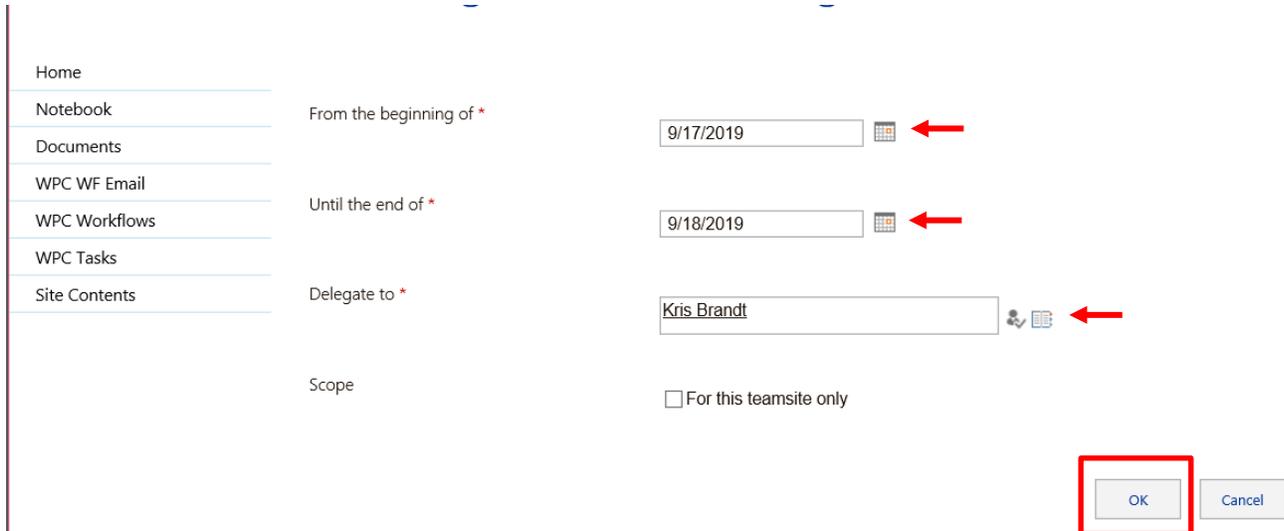
Select People



Find × List View ▼

	Display Name	E-mail Address	Title	Department
All Search Results (5)	Jeffrey S Brandt	brandt@fnal.gov		
All Users (0)	Kris Brandt	kbrandt@fnal.gov		
Active Directory (0)	Andrew Brandt	brandta@fnal.gov		
Ping Identity People Picker Claim	kbrandt-test			
Organizations (0)	John L. Brandt	jibrandt@fnal.gov		

7. Click “OK” when all fields complete.



8. Your delegation is complete and will expire on the end date you have selected.

Nintex task delegation

▣ Delegate tasks to a user between specific dates

Start date	End date	Applies to	Tasks delegated to
9/17/2019	9/18/2019	All sites	Kris Brandt