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.

Revision History

Name	Description	Date
Kathy Vuletich	Initial Release	September 2019
Kathy Vuletich	Changed reference from supervisor to Authorizing Supervisor.	December 2019

CLICK ON A TOPIC

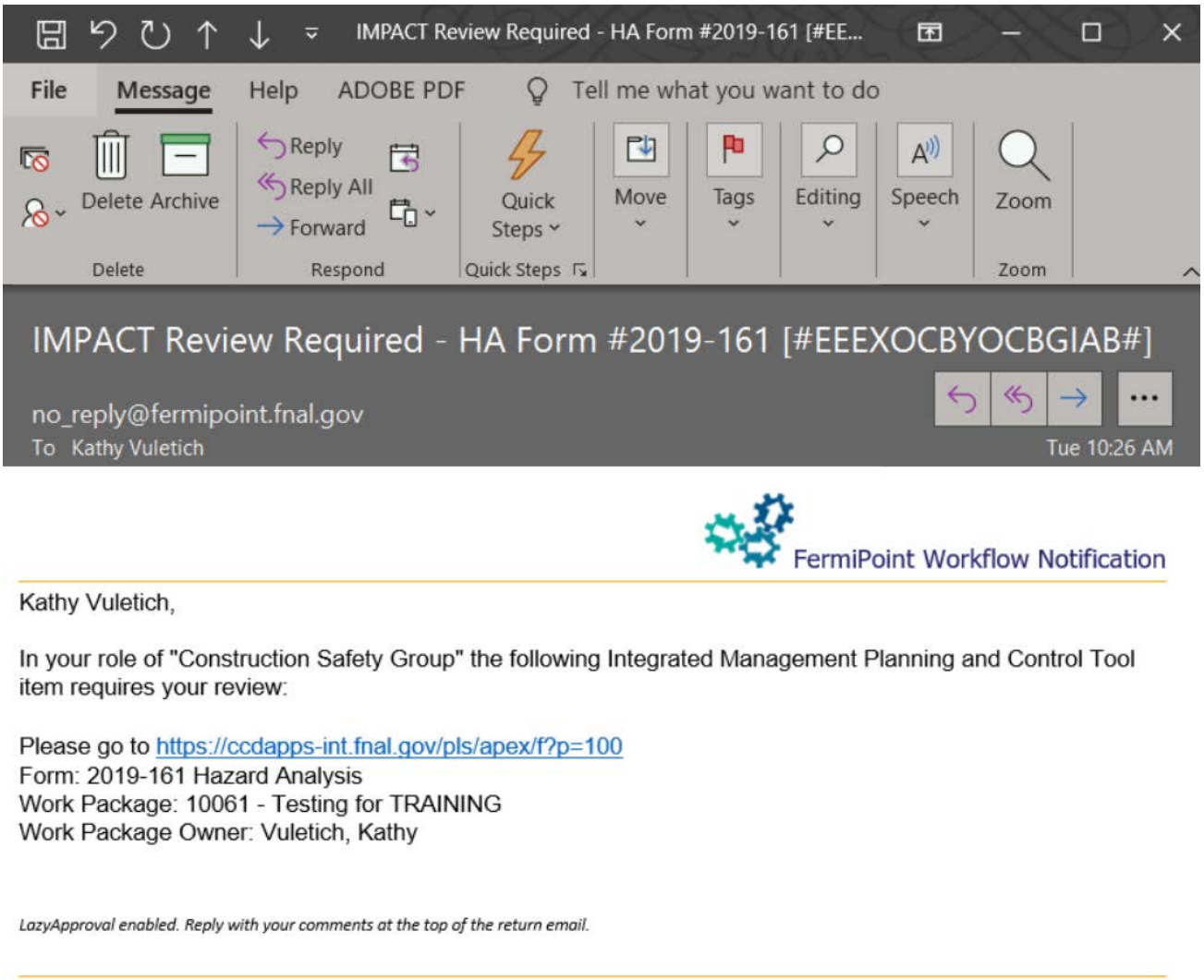
RESPONDING TO WORKFLOW NOTIFICATIONS - SME 3

RESPONDING TO WORKFLOW NOTIFICATIONS – AUTHORIZING SUPERVISOR..... 7

HOW TO DELEGATE WORKFLOW REVIEWS & APPROVALS..... 11

RESPONDING TO WORKFLOW NOTIFICATIONS - SME

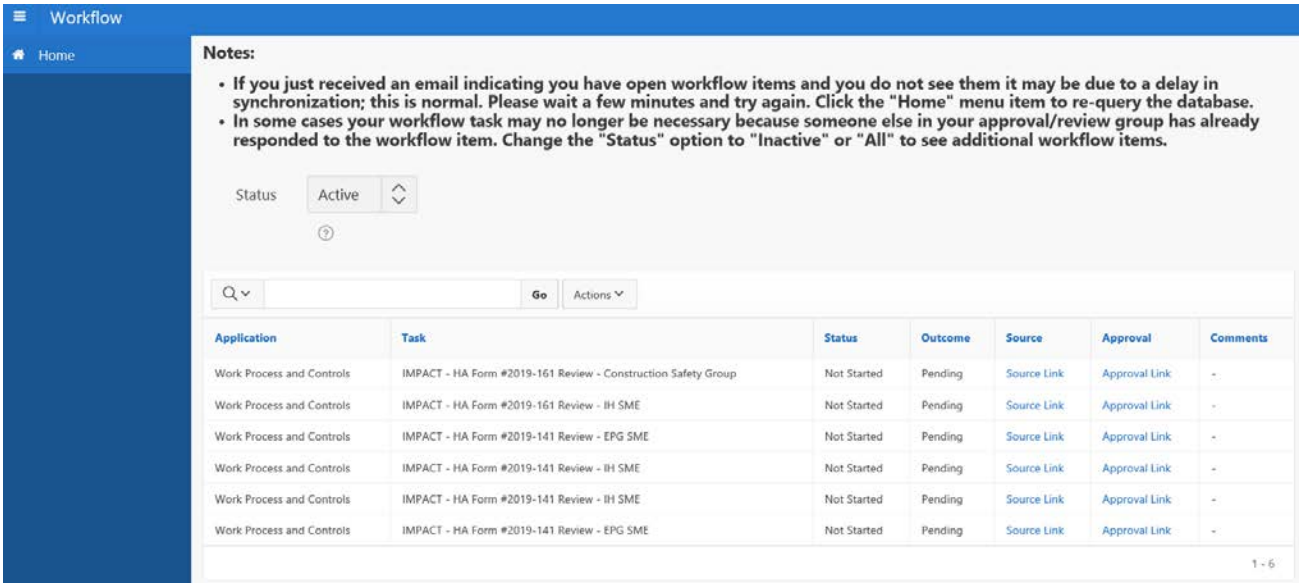
You will receive an email from the IMPACT system if action is required of you in the workflow portion of the tool. The email you receive will look similar to the example below.



Follow the instructions below to address your workflow item.

1. Open the email and click on the provided link.

2. Your browser will open, and you will be taken to the workflow que.



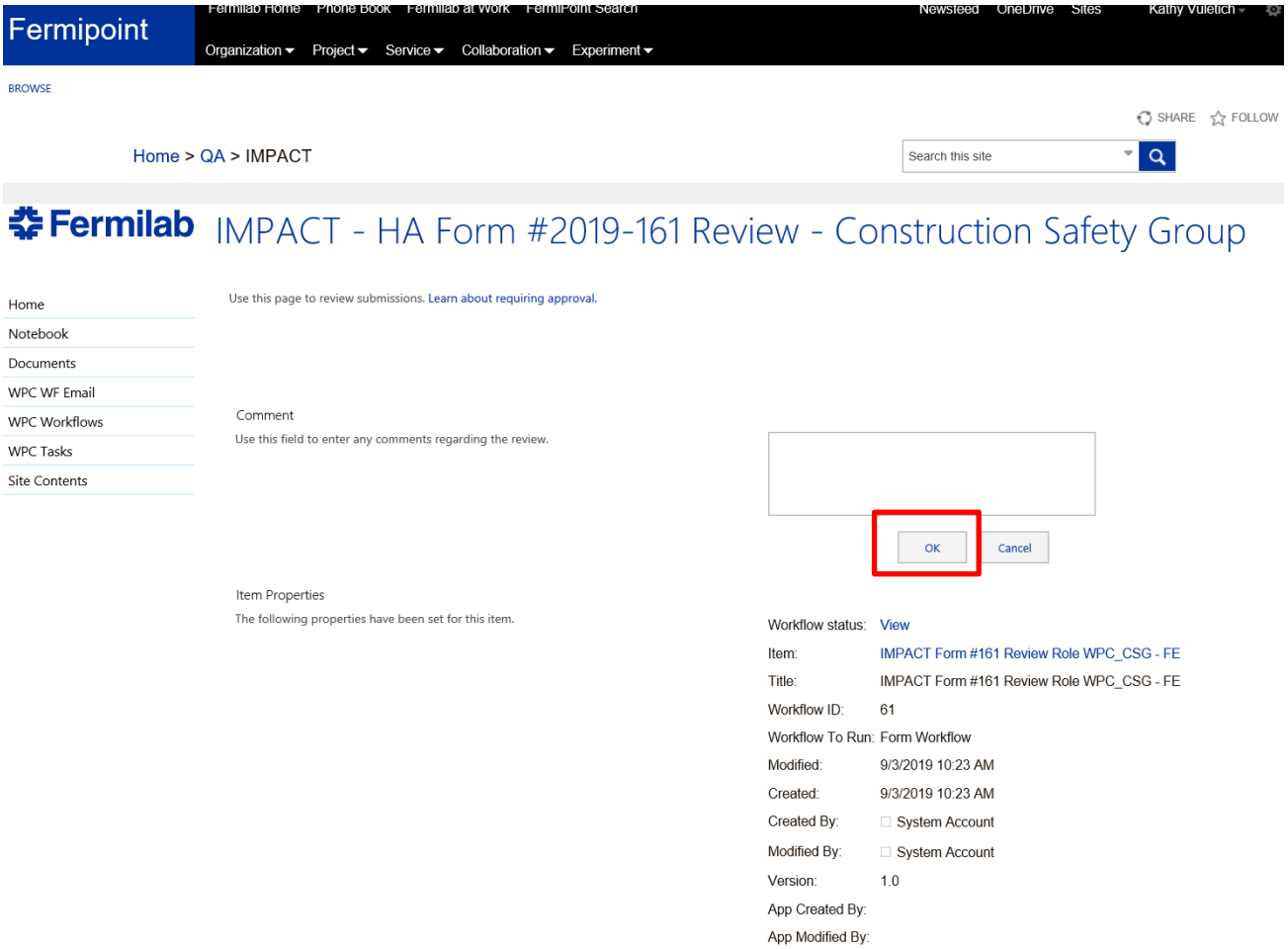
3. The list that appears corresponds to the workflow items you need to address.

   a. Task – The task column indicates what form you are required to review, and what role you are reviewing that form for.

   b. Source – Clicking on the source link will take you to the IMPACT system to view the form that you must address in the workflow.

   c. Approval – Clicking on the approval link will take you to the workflow tool. See the next step.

4. When you are ready to address your item, click on the "Approval Link" associated with the form and role you are addressing.

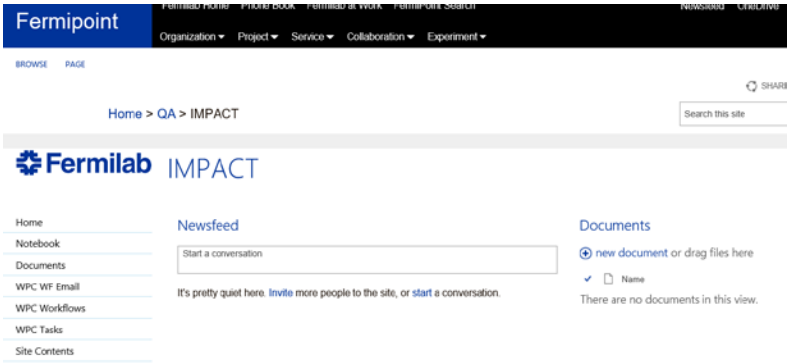


5. A new browser window will open, and you are now in the workflow tool (in FermiPoint).

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.



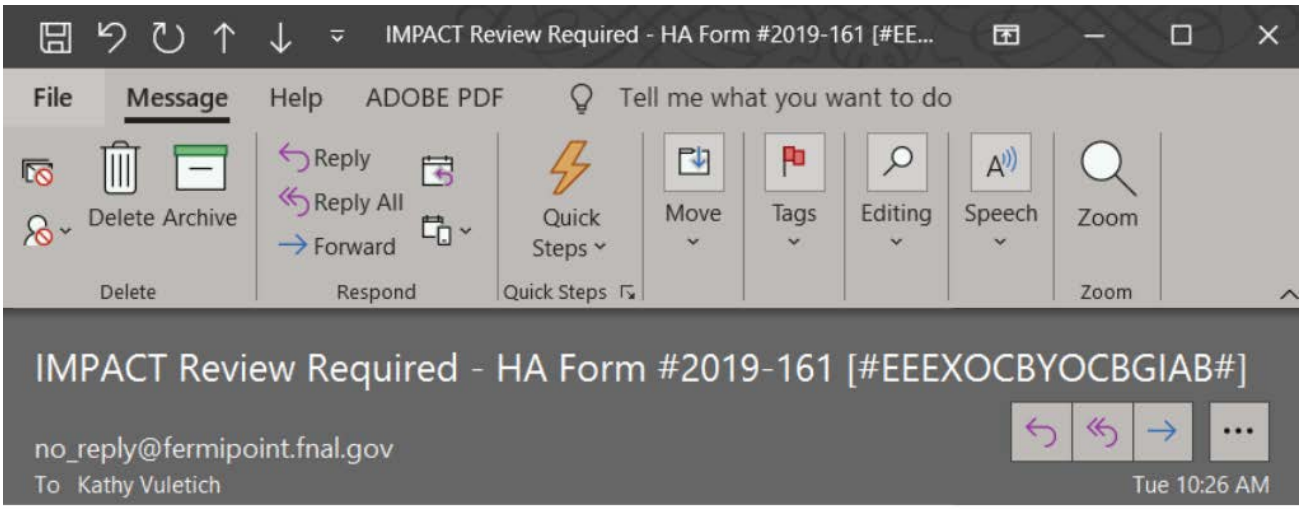
8. Your action is now complete, and the item is removed from your list of workflow items to address.

9. Any comments you added into the workflow will be provided to the submitter for consideration.

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 similar to the example below.



FermiPoint Workflow Notification

Kathy Vuletich,

In your role of "Construction Safety Group" the following Integrated Management Planning and Control Tool item requires your review:

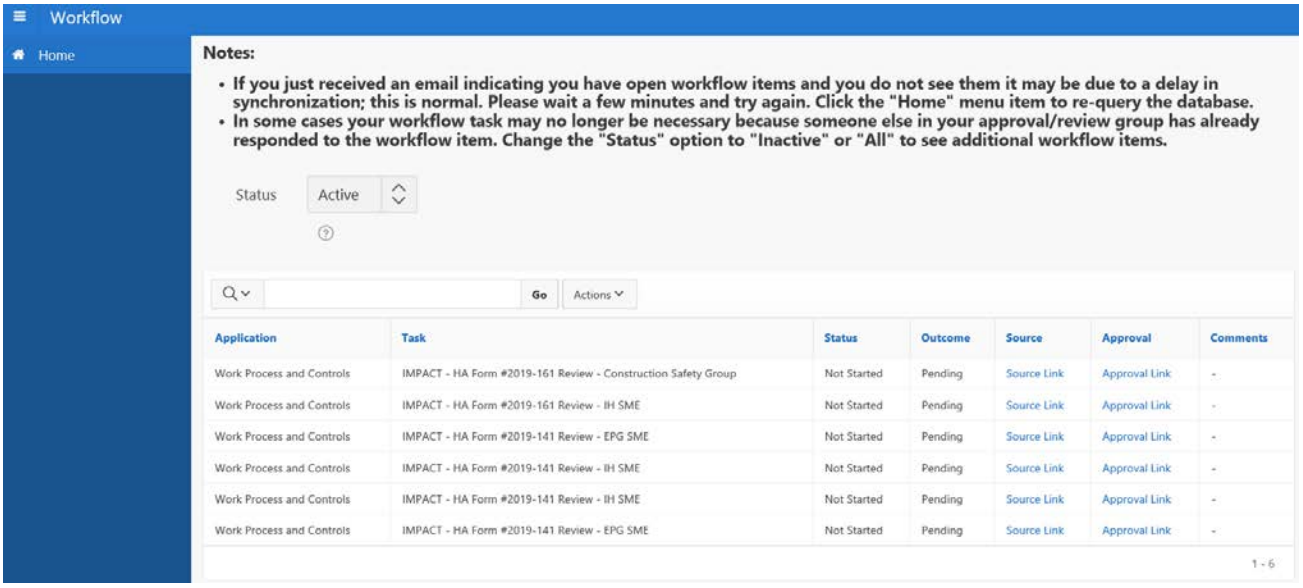
Please go to https://ccdapps-int.fnal.gov/pls/apex/f?p=100
Form: 2019-161 Hazard Analysis
Work Package: 10061 - Testing for TRAINING
Work Package Owner: Vuletich, Kathy

LazyApproval enabled. Reply with your comments at the top of the return email.

Follow the instructions below to address your workflow item.

1. Open the email and click on the provided link.

2. Your browser will open, and you will be taken to the workflow que.



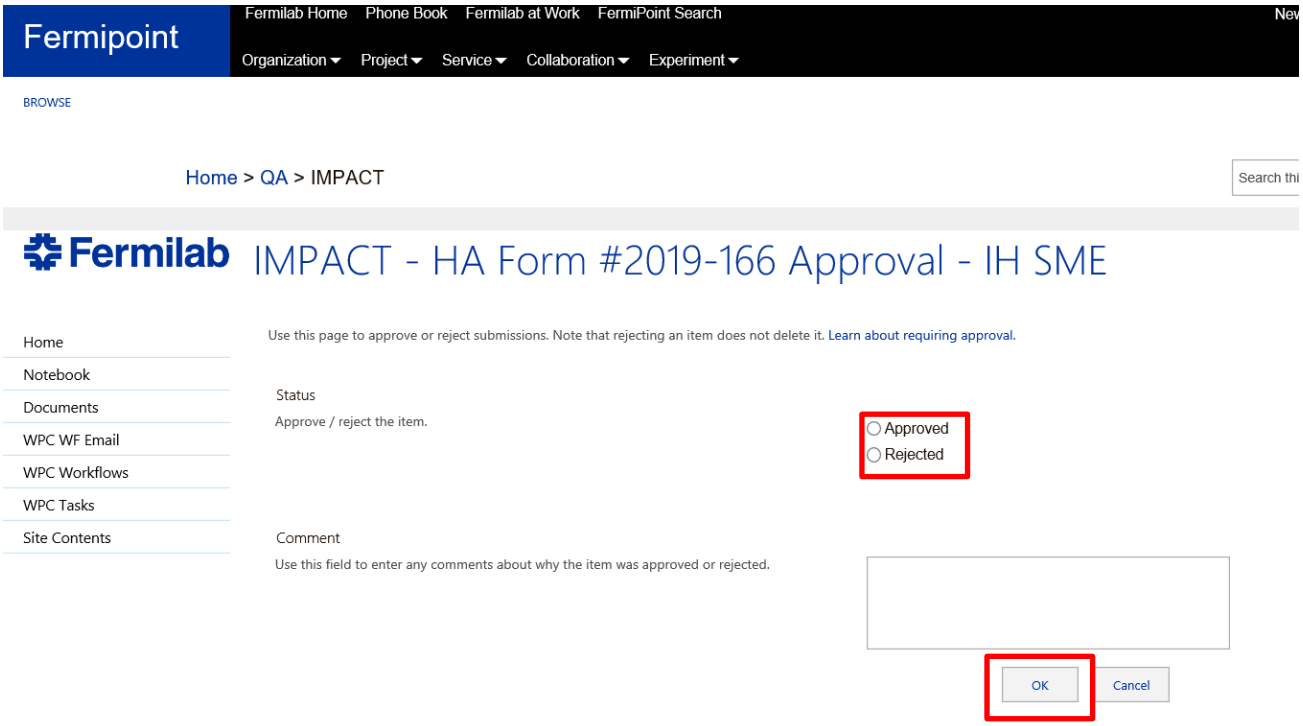
3. The list that appears corresponds to the workflow items you need to address.

    a. Task – The task column indicates what form you are required to review, and what role you are reviewing that form for.

    b. Source – Clicking on the source link will take you to the IMPACT system to view the form that you must address in the workflow.

    c. Approval – Clicking on the approval link will take you to the workflow tool. See the next step.

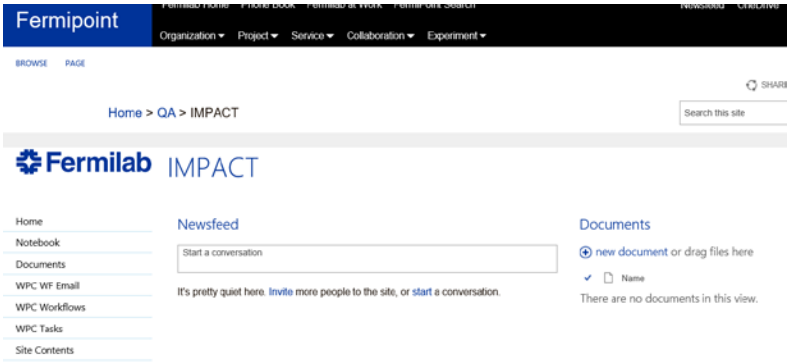
4. When you are ready to address your item, click on the "Approval Link" associated with the form and role you are addressing.



5. A new browser window will open, and you are now in the workflow tool (in FermiPoint).
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. If you rejected the submittal, an email will be sent to the submitter alerting them of the rejection.

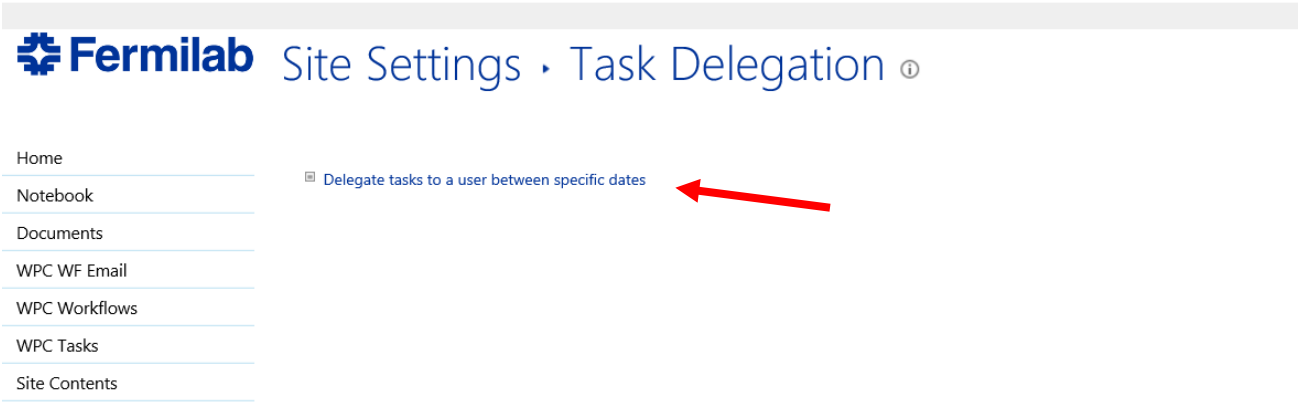
HOW TO DELEGATE WORKFLOW REVIEWS & APPROVALS

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.

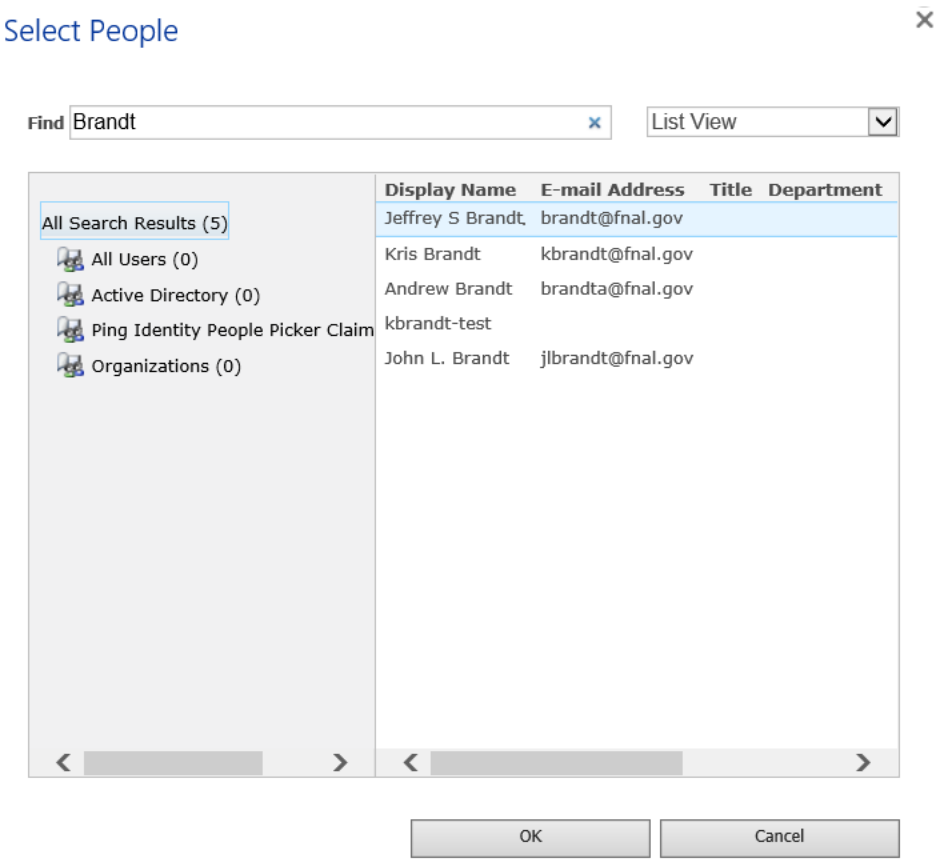
Follow the instructions below on how to delegate your review and approval responsibilities to another person.

1. Go to SharePoint and click on your name in the upper right corner.
2. Click on "Nintex Workflow 2013".
3. Click on "Task Delegation".

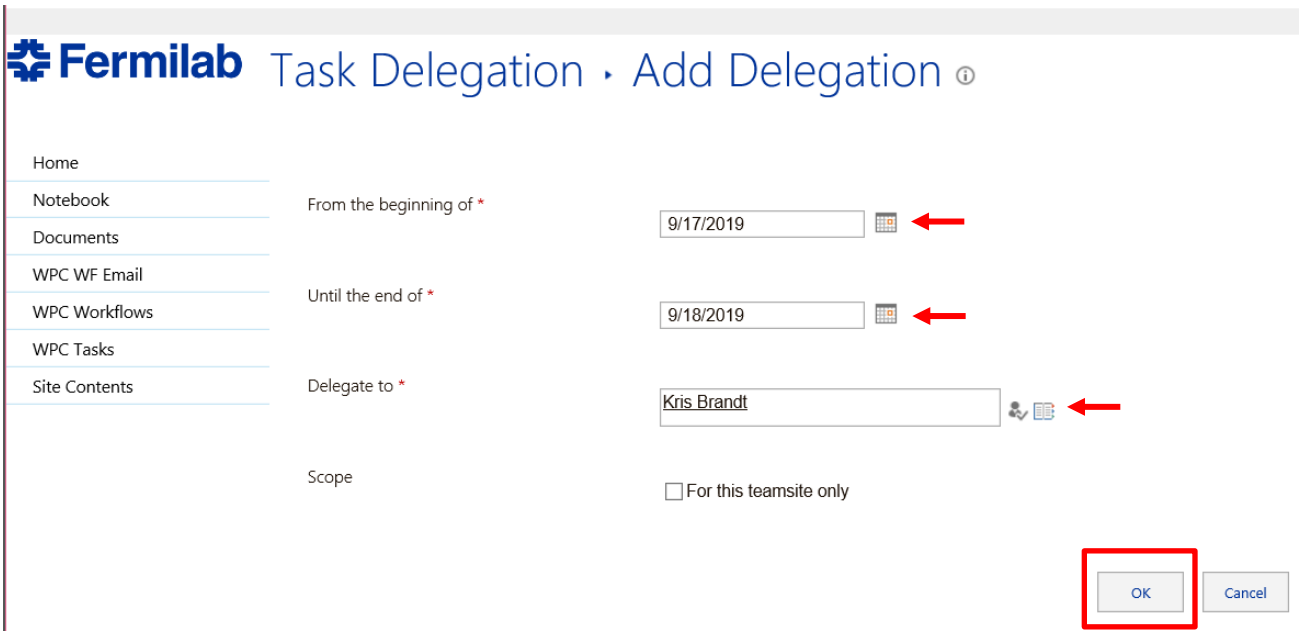
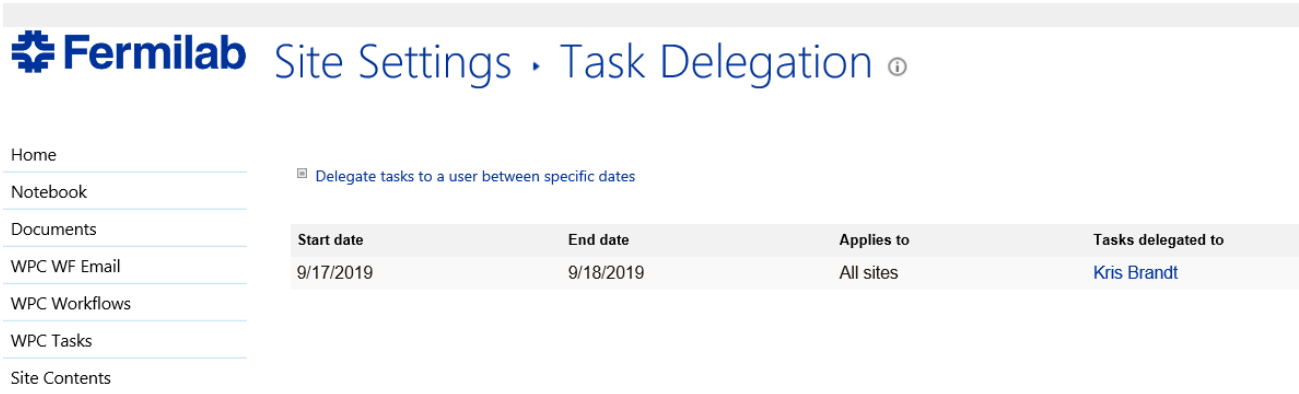
4. Click on "Delegate tasks to a user between specific dates".



5. Add the start date to begin the delegation by clicking the calendar for “From the beginning of”.
6. Add the end date to end the delegation by clicking the calendar for “Until the end of”.
7. 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”.



8. Click “OK” when all fields complete.



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