

# 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](mailto:kathy@fnal.gov) to get access.

### Revision History

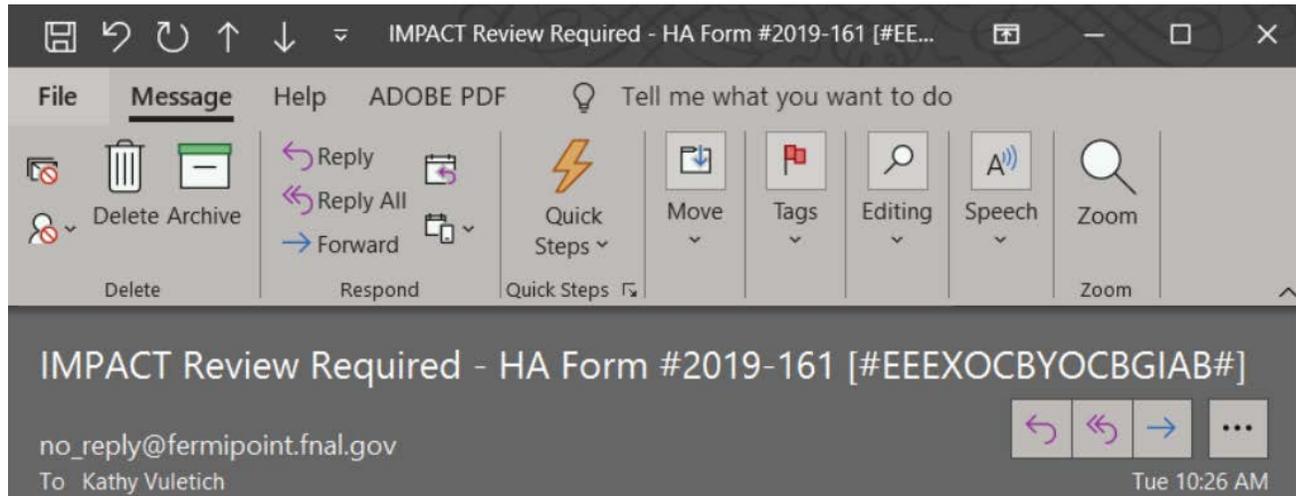
Name	Description	Date
Kathy Vuletich	Initial Release	September 2019

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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 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

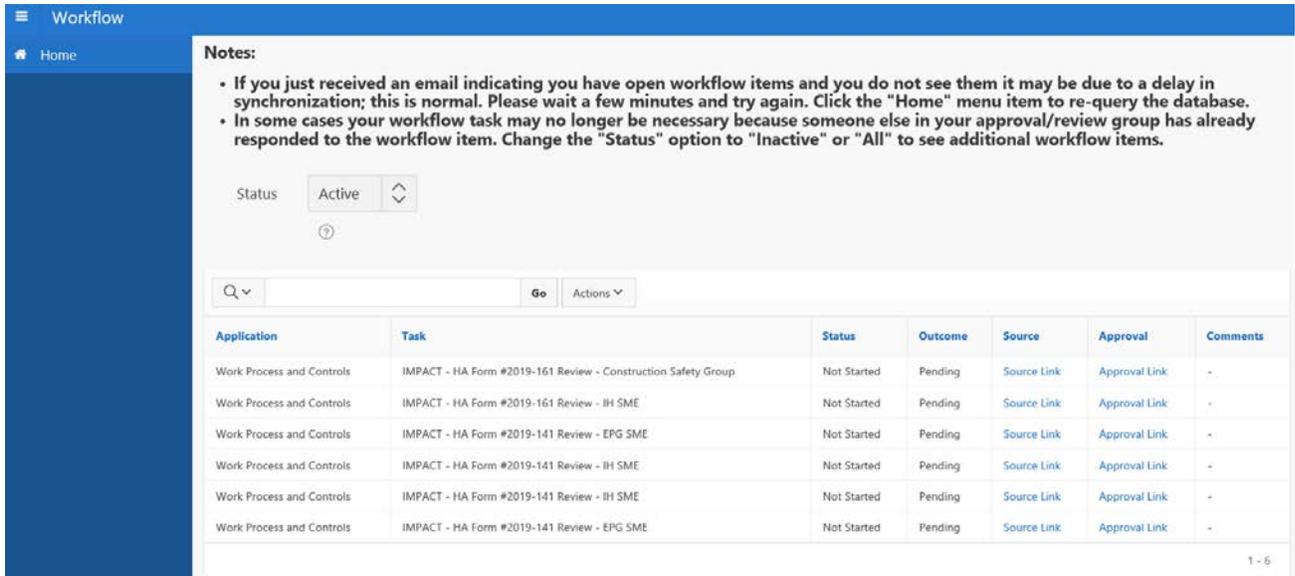
Work Package Owner: Vuletich, Kathy

*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.



**Notes:**

- If you just received an email indicating you have open workflow items and you do not see them it may be due to a delay in synchronization; this is normal. Please wait a few minutes and try again. Click the "Home" menu item to re-query the database.
- 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:

Q

Application	Task	Status	Outcome	Source	Approval	Comments
Work Process and Controls	IMPACT - HA Form #2019-161 Review - Construction Safety Group	Not Started	Pending	<a href="#">Source Link</a>	<a href="#">Approval Link</a>	-
Work Process and Controls	IMPACT - HA Form #2019-161 Review - IH SME	Not Started	Pending	<a href="#">Source Link</a>	<a href="#">Approval Link</a>	-
Work Process and Controls	IMPACT - HA Form #2019-141 Review - EPG SME	Not Started	Pending	<a href="#">Source Link</a>	<a href="#">Approval Link</a>	-
Work Process and Controls	IMPACT - HA Form #2019-141 Review - IH SME	Not Started	Pending	<a href="#">Source Link</a>	<a href="#">Approval Link</a>	-
Work Process and Controls	IMPACT - HA Form #2019-141 Review - IH SME	Not Started	Pending	<a href="#">Source Link</a>	<a href="#">Approval Link</a>	-
Work Process and Controls	IMPACT - HA Form #2019-141 Review - EPG SME	Not Started	Pending	<a href="#">Source Link</a>	<a href="#">Approval Link</a>	-

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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.

 **IMPACT - HA Form #2019-161 Review - Construction Safety Group**

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[Notebook](#)[Documents](#)[WPC WF Email](#)[WPC Workflows](#)[WPC Tasks](#)[Site Contents](#)Use this page to review submissions. [Learn about requiring approval.](#)

Comment

Use this field to enter any comments regarding the review.

OK

Cancel

Item Properties

The following properties have been set for this item.

Workflow status: [View](#)Item: [IMPACT Form #161 Review Role WPC\\_CSG - FE](#)Title: [IMPACT Form #161 Review Role WPC\\_CSG - FE](#)

Workflow ID: 61

Workflow To Run: Form Workflow

Modified: 9/3/2019 10:23 AM

Created: 9/3/2019 10:23 AM

Created By:  System AccountModified By:  System Account

Version: 1.0

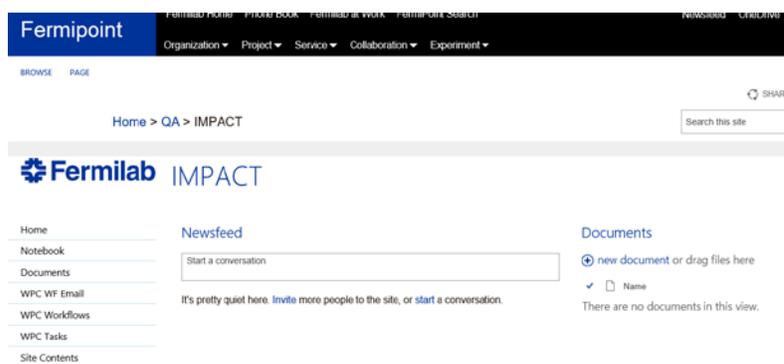
App Created By:

App Modified By:

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.

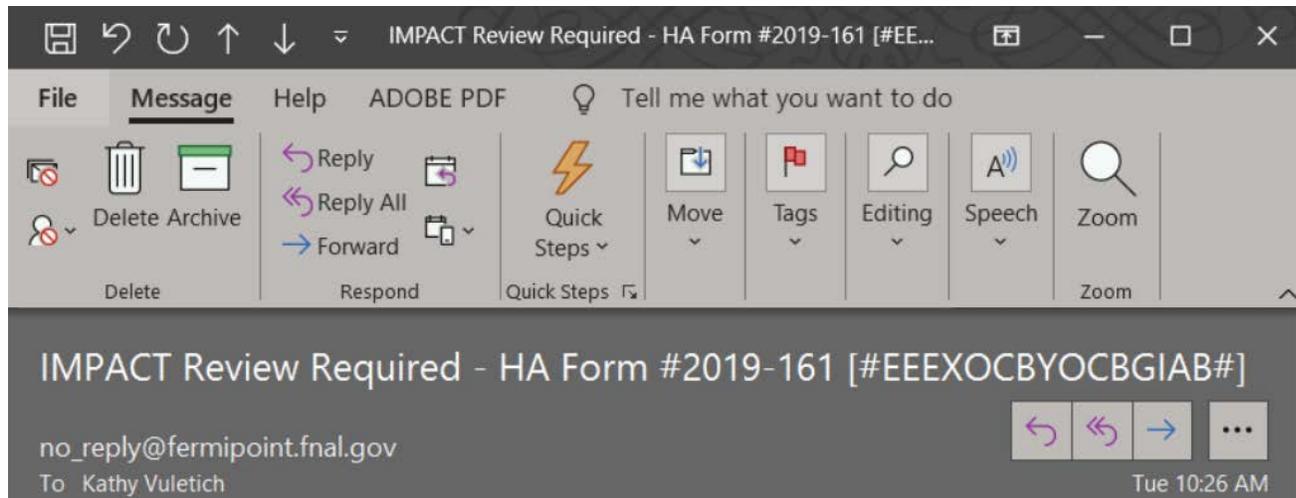


8. Your action is now complete, and the item is removed from your list of workflow items to address.
9. Any comments you added into the workflow will be provided to the submitter for consideration.

## **RESPONDING TO WORKFLOW NOTIFICATIONS - SUPERVISOR**

As a 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.



Kathy Vuletich,

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

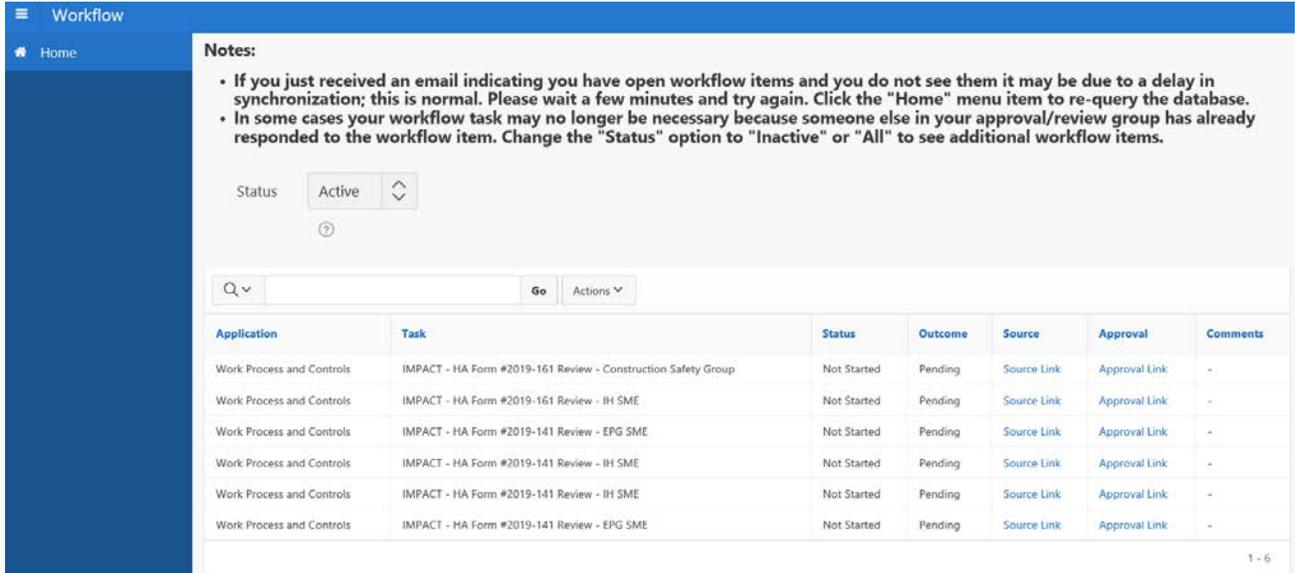
Please go to <https://ccdapps-int.fnal.gov/pls/apex/f?p=100>  
Form: 2019-161 Hazard Analysis  
Work Package: 10061 - Testing for TRAINING  
Work Package Owner: Vuletich, Kathy

*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.



**Notes:**

- If you just received an email indicating you have open workflow items and you do not see them it may be due to a delay in synchronization; this is normal. Please wait a few minutes and try again. Click the "Home" menu item to re-query the database.
- 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:

Q

Application	Task	Status	Outcome	Source	Approval	Comments
Work Process and Controls	IMPACT - HA Form #2019-161 Review - Construction Safety Group	Not Started	Pending	<a href="#">Source Link</a>	<a href="#">Approval Link</a>	-
Work Process and Controls	IMPACT - HA Form #2019-161 Review - IH SME	Not Started	Pending	<a href="#">Source Link</a>	<a href="#">Approval Link</a>	-
Work Process and Controls	IMPACT - HA Form #2019-141 Review - EPG SME	Not Started	Pending	<a href="#">Source Link</a>	<a href="#">Approval Link</a>	-
Work Process and Controls	IMPACT - HA Form #2019-141 Review - IH SME	Not Started	Pending	<a href="#">Source Link</a>	<a href="#">Approval Link</a>	-
Work Process and Controls	IMPACT - HA Form #2019-141 Review - IH SME	Not Started	Pending	<a href="#">Source Link</a>	<a href="#">Approval Link</a>	-
Work Process and Controls	IMPACT - HA Form #2019-141 Review - EPG SME	Not Started	Pending	<a href="#">Source Link</a>	<a href="#">Approval Link</a>	-

1 - 6

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.



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

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

Status

Approve / reject the item.

 Approved  
 Rejected

Comment

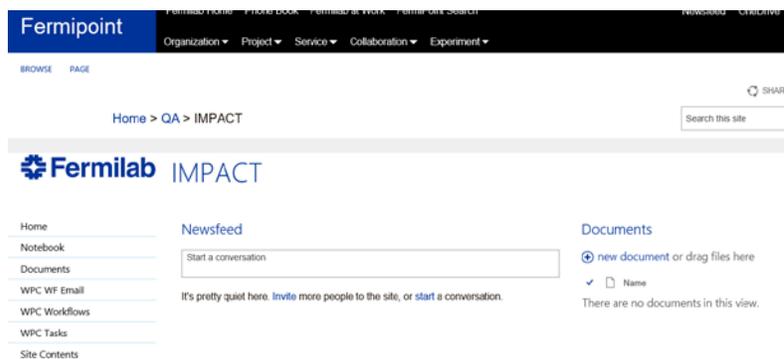
Use this field to enter any comments about why the item was approved or rejected.

OK

Cancel

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 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](#)”.

### Site Settings · Task Delegation ⓘ

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▣ [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”.

### Select People ✕

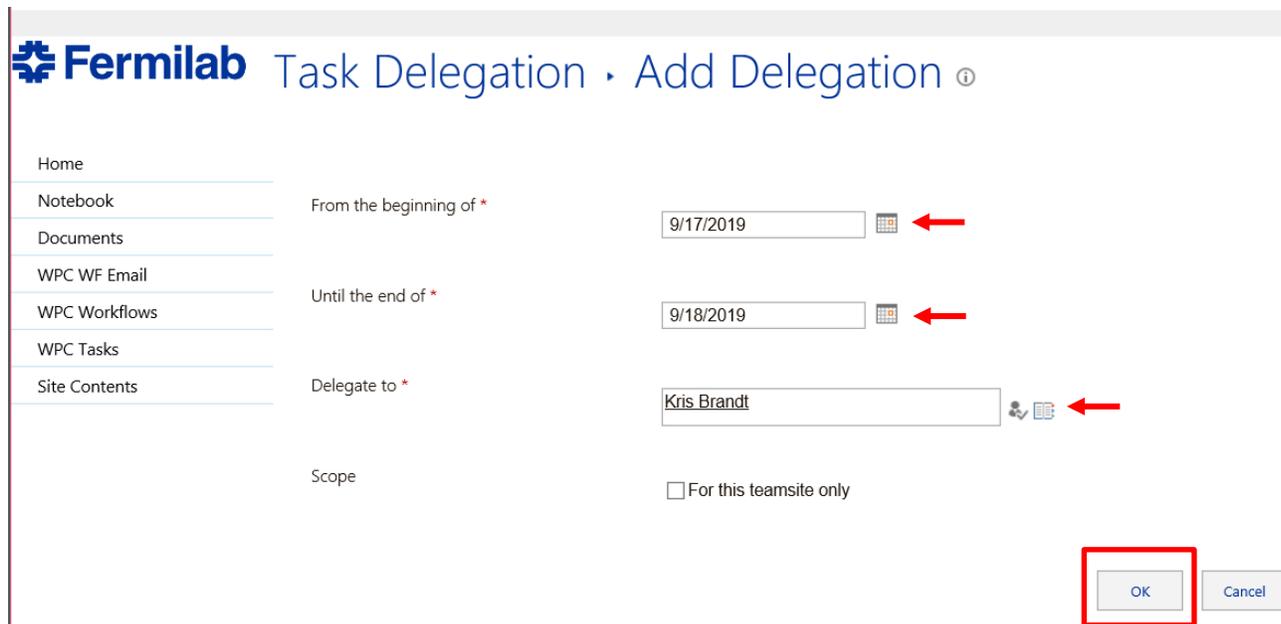
Find  ✕
List View ▼

	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		

<  >
<  >

OK
Cancel

8. Click “OK” when all fields complete.



**Fermilab** Task Delegation › Add Delegation ⓘ

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Notebook From the beginning of \*   

Documents

WPC WF Email Until the end of \*   

WPC Workflows

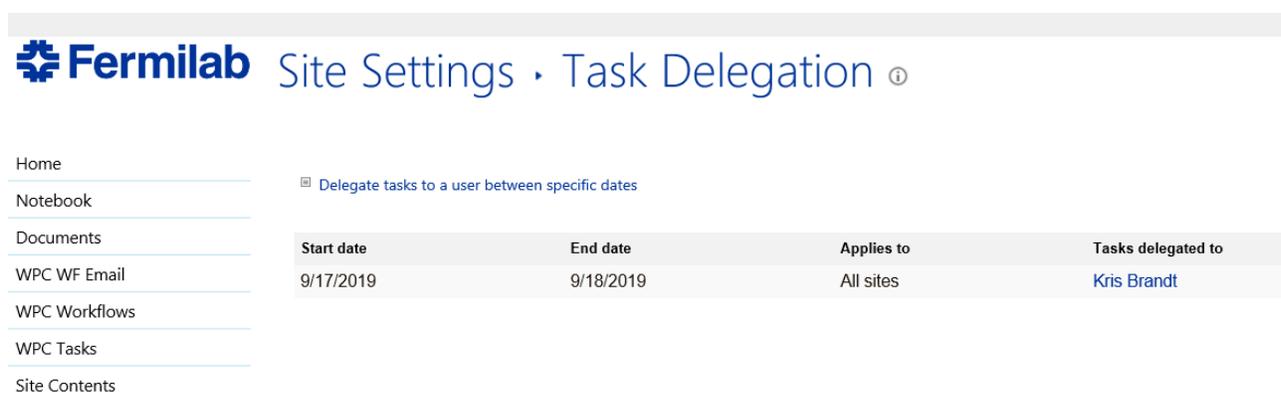
WPC Tasks Delegate to \*    

Site Contents

Scope  For this teamsite only

**OK** Cancel

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



**Fermilab** Site Settings › Task Delegation ⓘ

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