GK Workflow Template

Set Up

User Guide

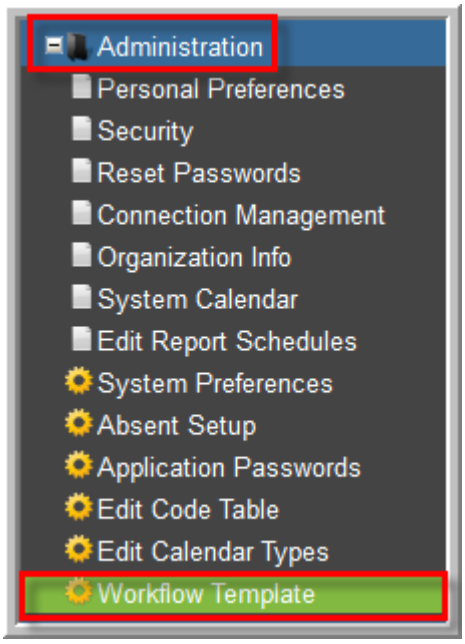
2021.3

Gatekeeper Workflow Template- Set Up

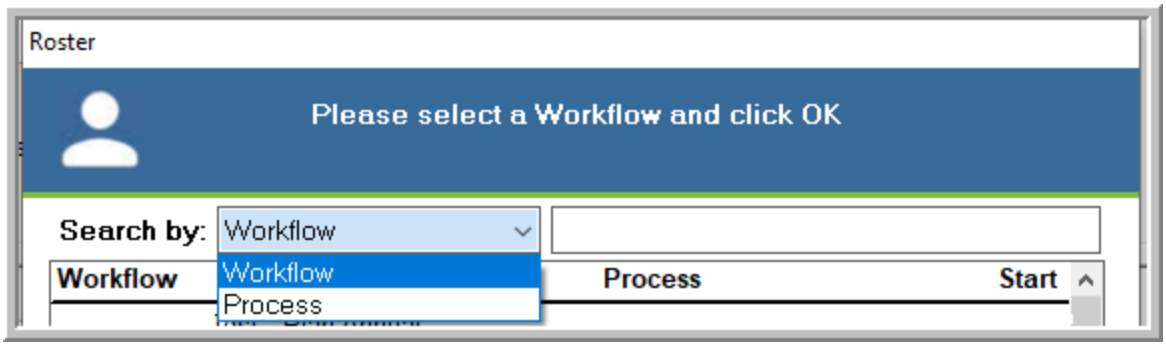
When a user is capturing details within the Anywhere Plan, the workflow tool allows users to track the steps for completing the plan process. The workflow option is available for annual plans and plan revisions.

Workflow Template Setup:

- Select the Administration tab on the Gatekeeper Dashboard.
- Select the Workflow Template window.



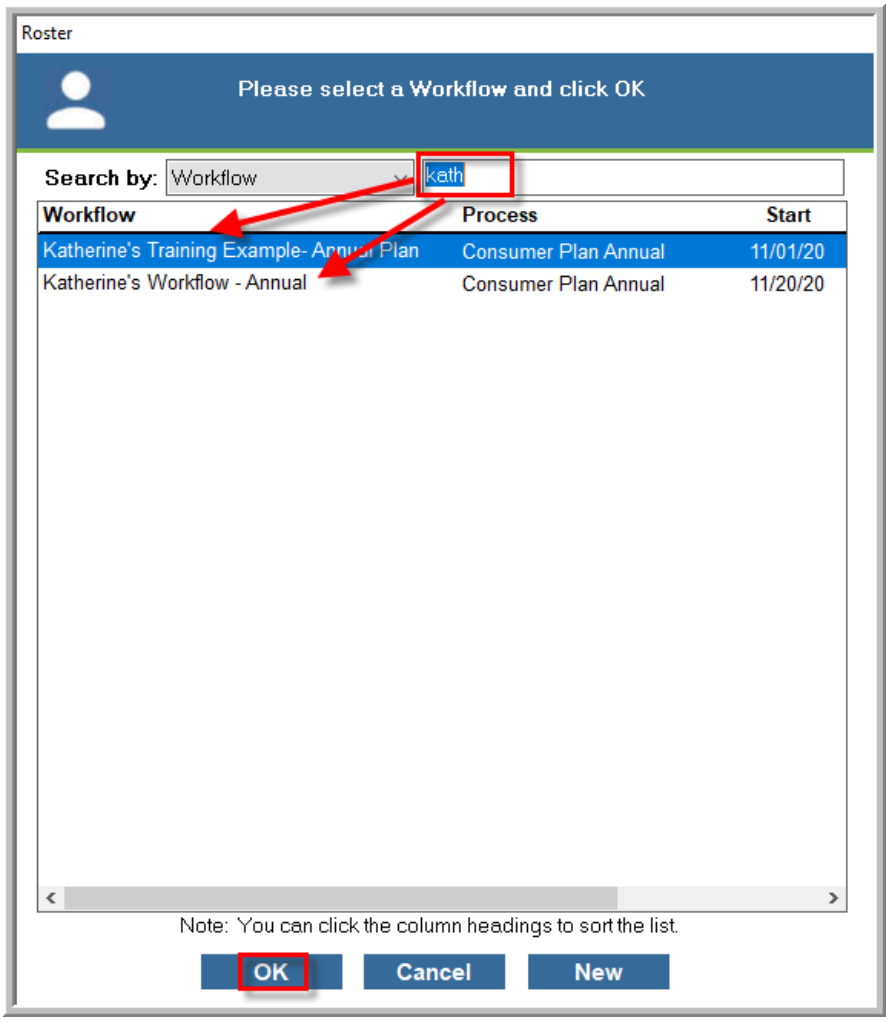
- A roster window will display. This roster will allow users to access existing workflow templates or create a new workflow template.
    - The roster will allow users to search for existing workflow templates by Process or Workflow.



- Use the drop down arrow to select the desired search criteria.

    - Users can select the desired workflow template. Once selected, the item will become highlighted.

    - Users can also begin typing the title in the text field. The program will narrow the search and display all workflow templates that match the suggestive typing.

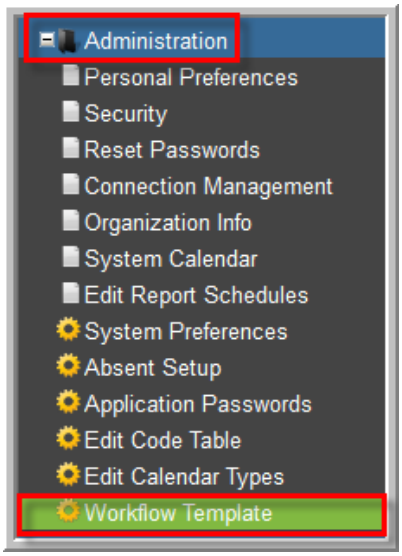


    - Once the desired workflow template is displayed, select and highlight the name.

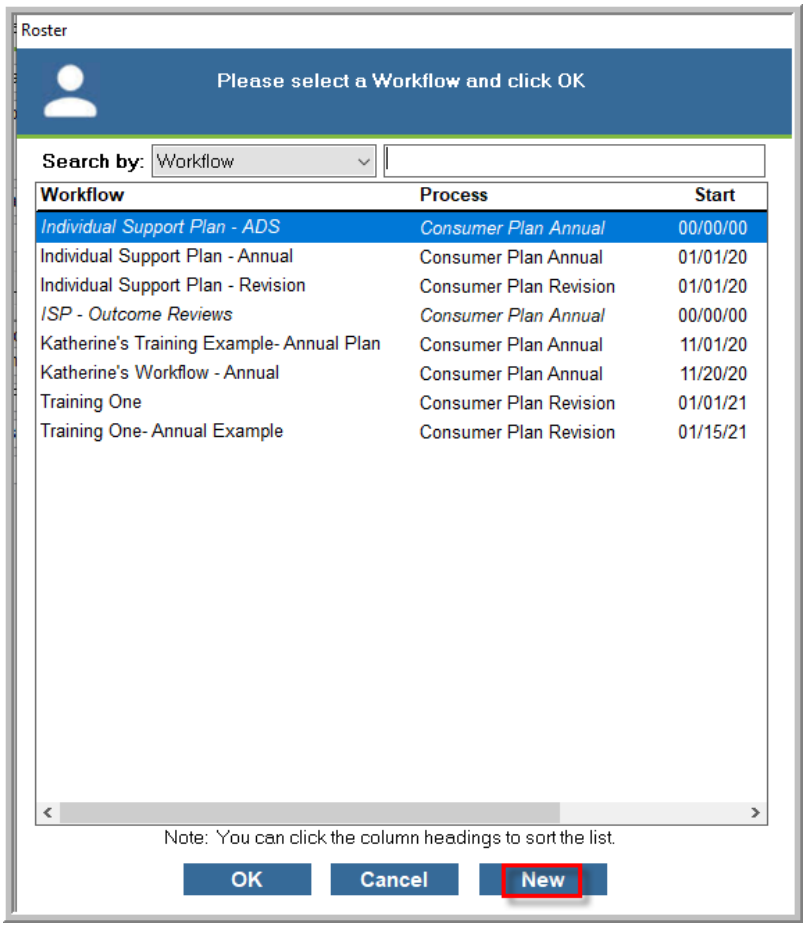
    - Then select OK or enter and the existing workflow template will display.

Inserting a New Workflow Template

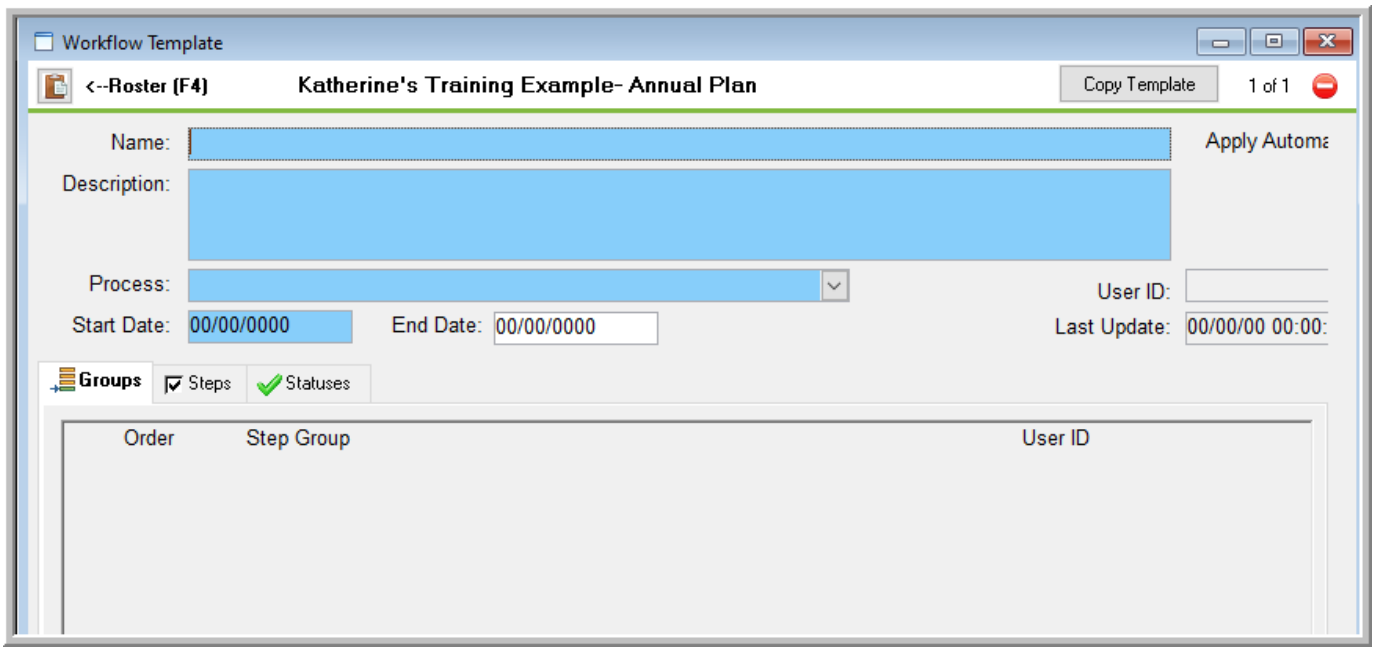
- Select the Administration tab on the Gatekeeper Dashboard.



- Select the Workflow Template window. The Roster will display.
- To create a new workflow template, select the New option.

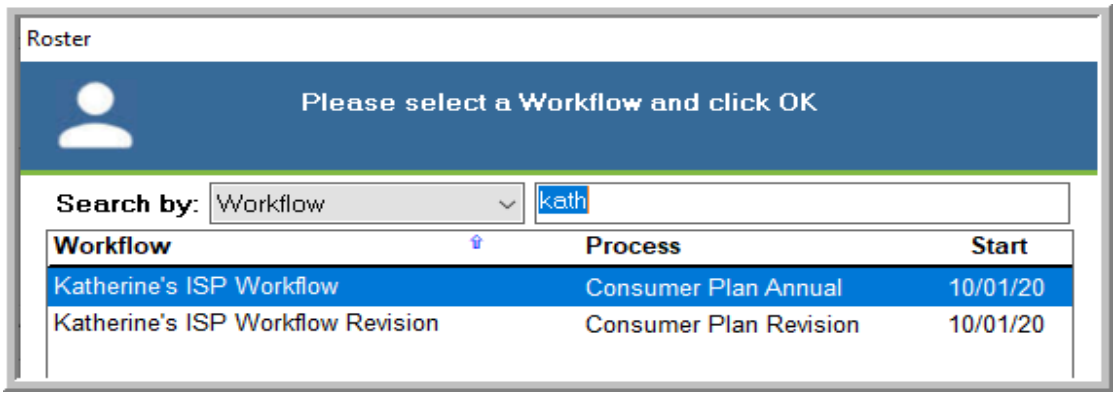


- When the Workflow Template window opens, the window will display blank text boxes for the Name, Description, Process, Start Date, and End Date.
    - The highlighted text boxes are required fields and entries must be inserted before the entry can be saved.
    - The End Date is not a required entry. The End Date can be left blank or a future date can be inserted on the workflow template.



- When assigning the Process, the process can only be assigned to one plan type.

If Administrators want the workflow to be applied to an annual and revision, then Administrators will need to create two separate workflows for the Annual and the Revision.



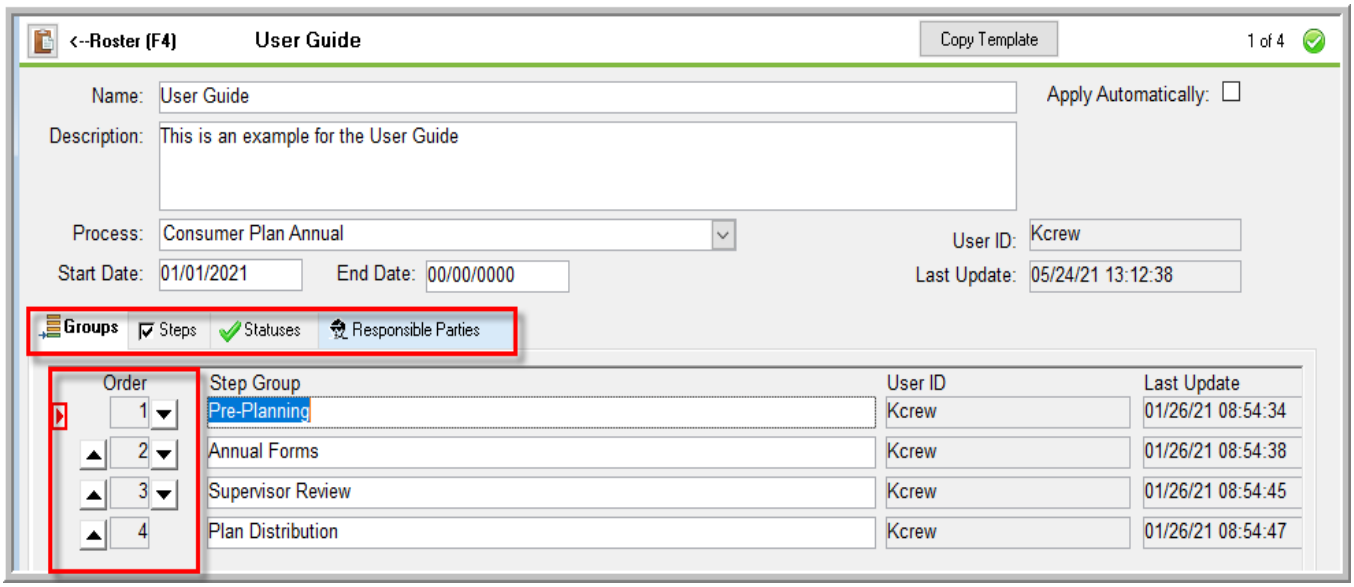
Workflow Set Up

The setup window allows Administrators to setup Groups, Steps, and Statuses for each Workflow Template.

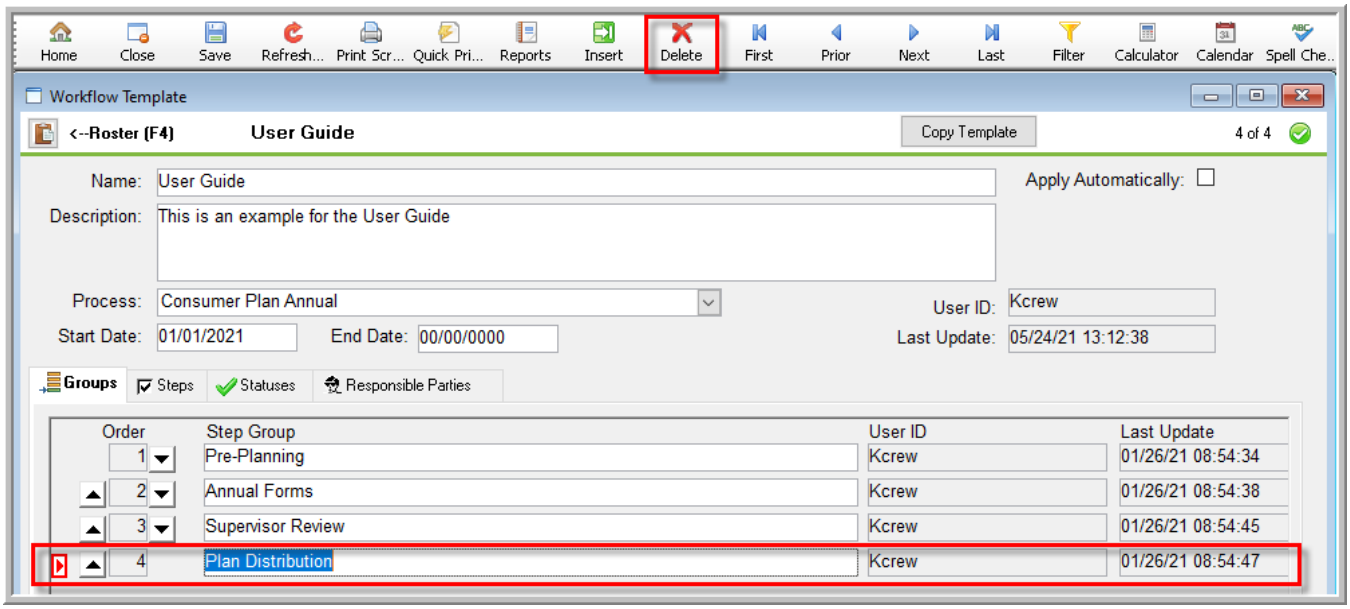
The Groups tab

This will allow administrators to set up the Step Groups for the Workflow process.

- To insert a group, use the green insert arrow in the toolbar.
- There is no limit to the number of Step Groups that can be assigned in this setup window.
- The Order arrows will allow administrators to arrange the items in the desired order.



- If a group needs to be deleted, select the desired group.
- The red triangle will indicate the line item that has been selected. Once the line item is selected, select the delete button in the toolbar.



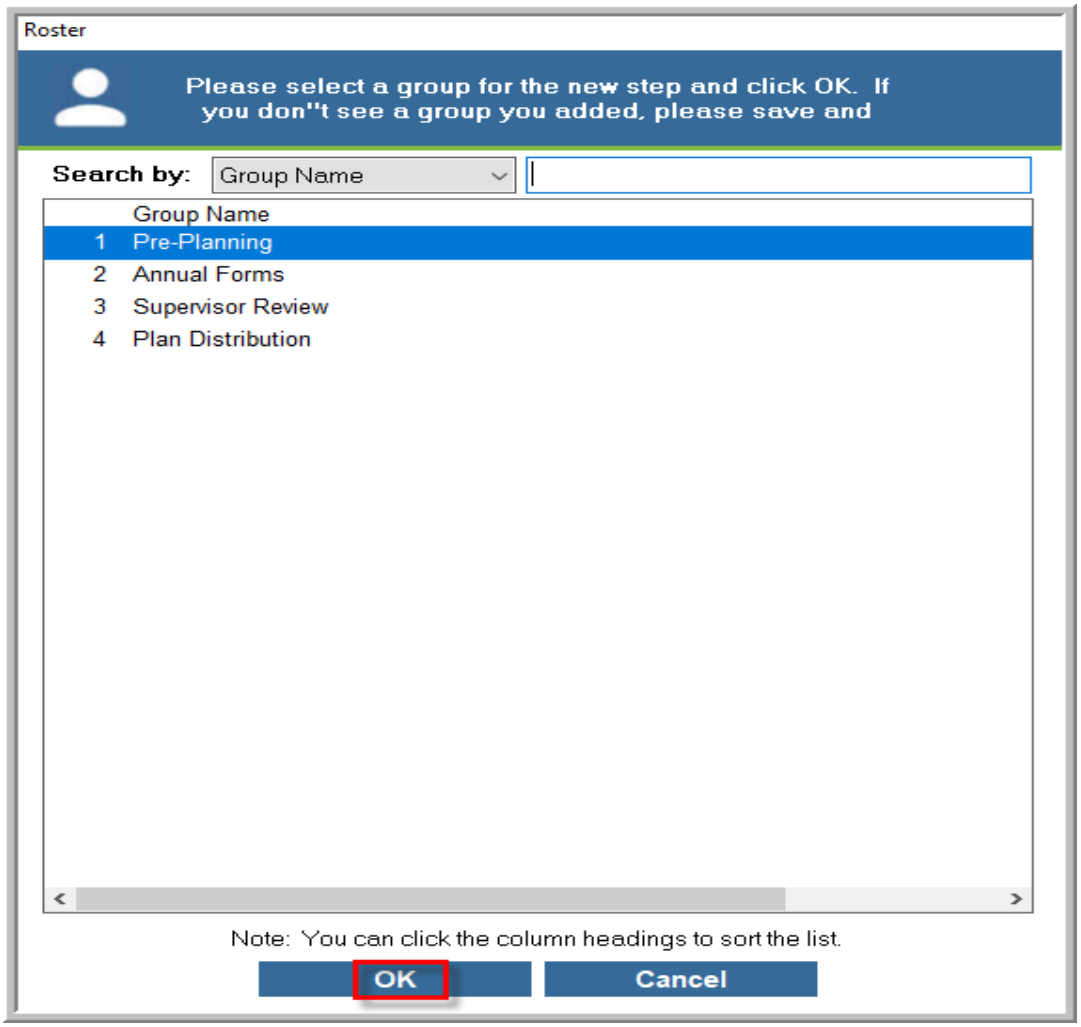
- When delete is selected, a message will display to confirm the deletion.
    - Select yes or no to delete the group. If yes is selected, the group will be deleted.

- If there are steps in the group that need deleted, users will see an option to either delete the steps or move the steps to a new group. This option is helpful for reorganizing the groups without losing the steps and automation.
    - If there are steps already defined for the group, the option to move those steps to another group will be presented. If the choice is to move the steps, then a list of groups to choose from will be displayed. Select the group and select OK to move the steps to the group selected. Choosing CANCEL will stop the group deletion process.
    - To save these changes, select the save button in the toolbar or use CTRL-S on the keyboard.
    - Once the record has been saved the indicator in the upper right hand of the window will display a green circle with a check mark.

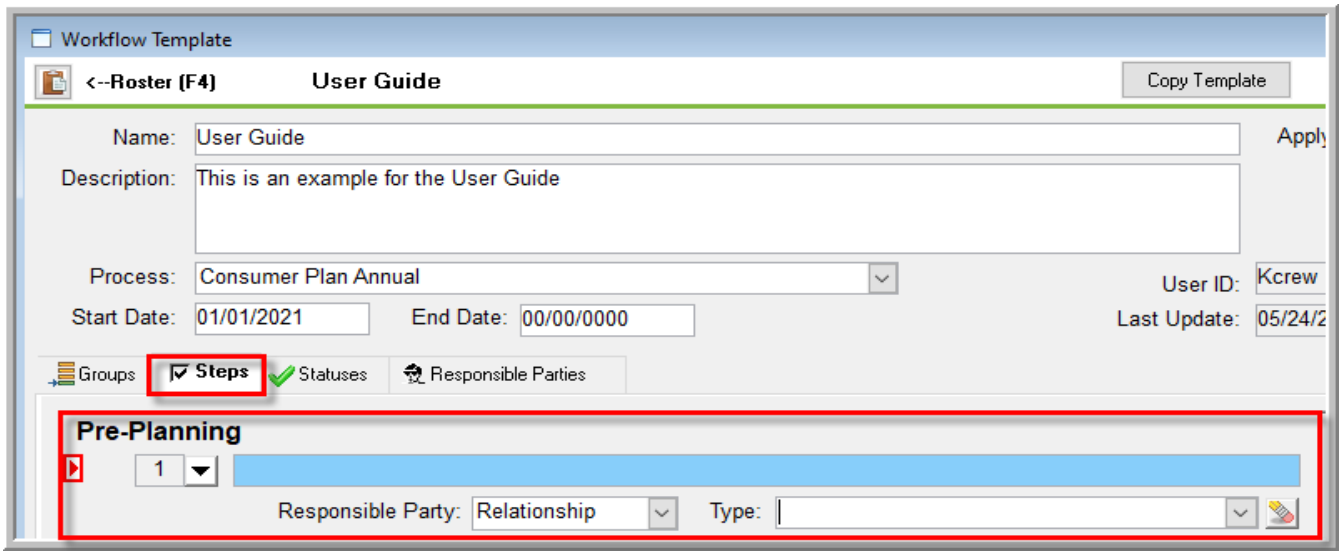
The Steps tab

This will allow administrators to assign steps for each step group.

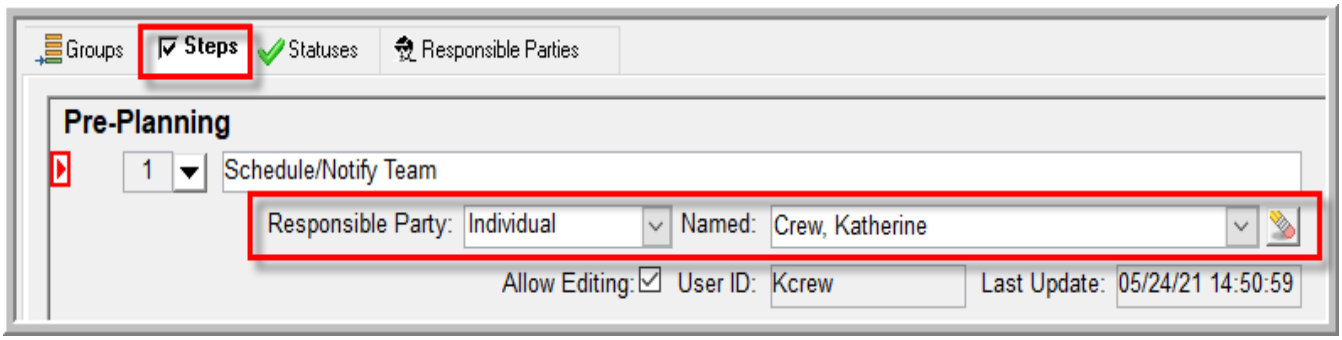
- To insert a step, use the green insert arrow.
- When selected, a roster window will display all groups that have been created in the workflow template.



- Select the desired group name in which steps need to be assigned. When selected, the item will highlight in blue, select ok.
    - If cancel, is selected the user will return to the Steps window. When OK is selected, the roster will close and the user will return to the steps window.
- The group name that was previously selected will appear at the top of the window in bold lettering.
- A blank line item will display in the window. The line item is highlighted in blue and will require an entry before the information can be saved.

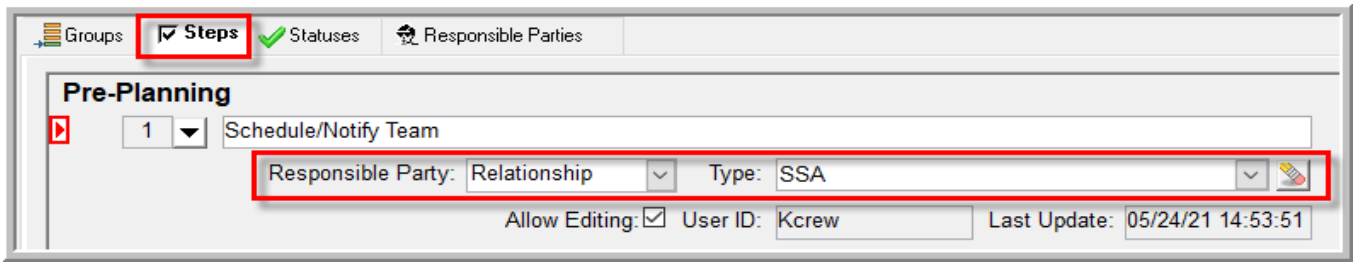


- Insert the Step information into the highlighted text field. Administrators can assign a responsible party as the Individual or as a Relationship.
- When an Individual is assigned, the following field will display a drop down arrow which will allow the administrator to assign or name a specific individual to the workflow template.

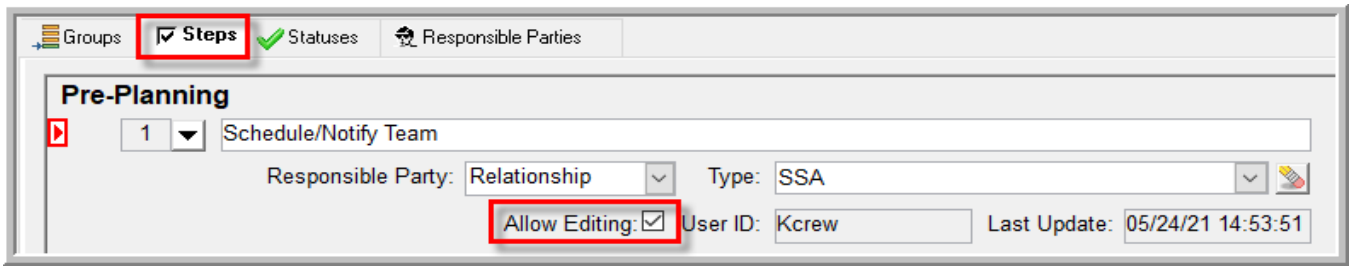


- If Relationship is assigned, the following field of Type will display. A drop down arrow will allow the administrator to assign a specific classification type to the workflow template.

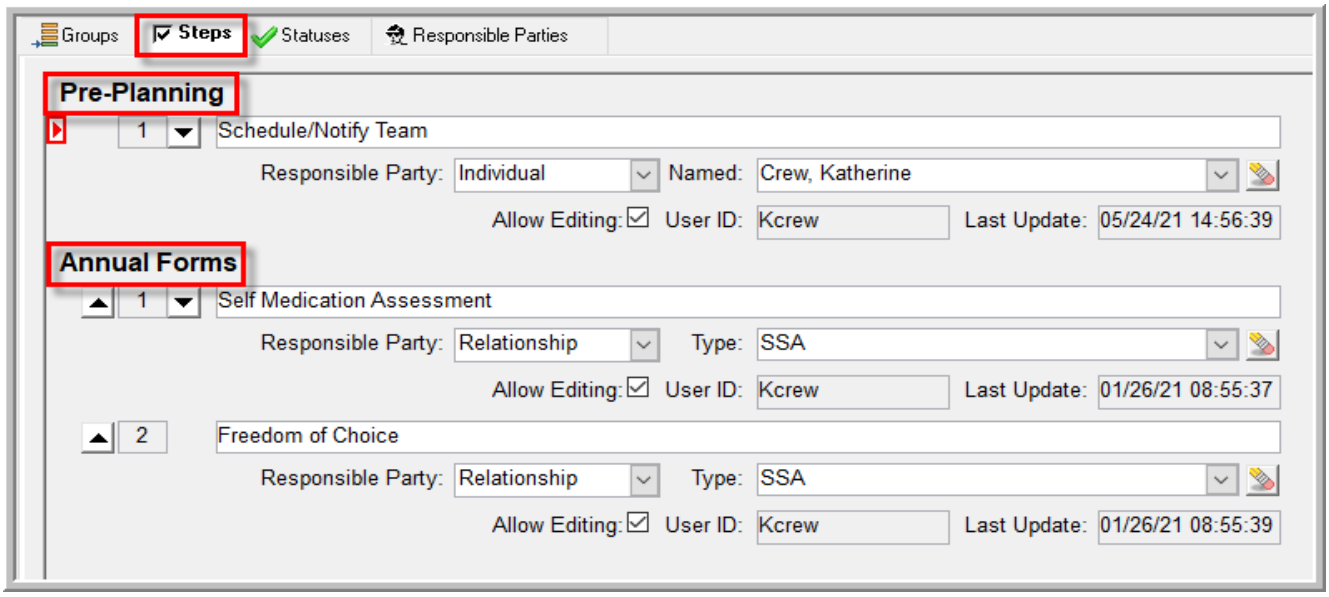
If a relationship is chosen when the workflow is used, that responsible party will be set based on the current relationship type with the individual on the Plan. It is recommended to only use the individual option for instances in which the person will rarely change.



- When the Allow Editing option is checked, this will allow users to revise or delete the prepopulated workflow steps within the Anywhere website.



- There are no limits for the steps that can be added to each group.

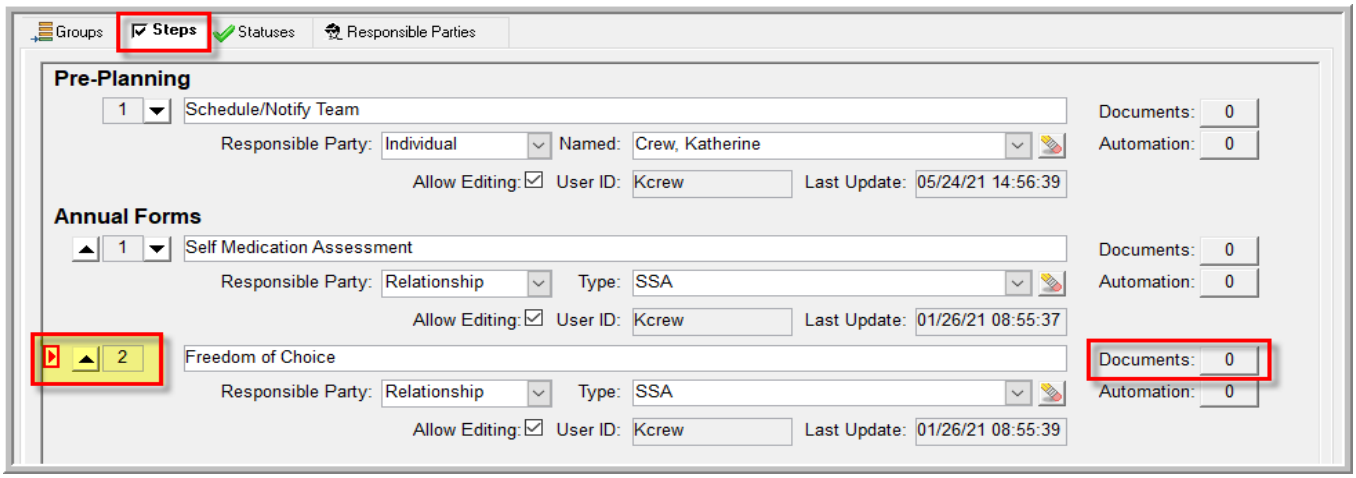


- If a step needs to be deleted, select the desired step.
- The red triangle will indicate the line item that has been selected. Once the line item is selected, select the delete button in the step documents wizard.
    - When delete is selected, a message will display to confirm the deletion. Select yes or no to delete the group.
        - If yes is selected, the step will be deleted.
        - To save these changes, select the save button in the toolbar or use CTRL-S on the keyboard. Once the record has been saved the indicator in the upper right hand of the window will display a green circle with a check mark.

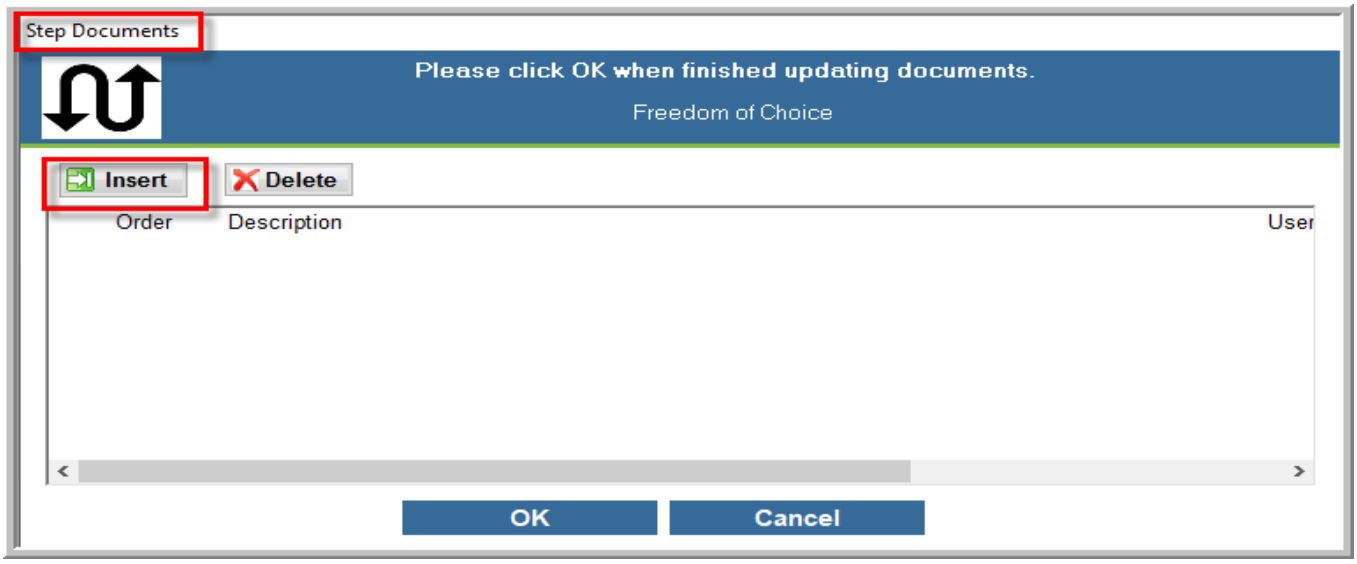
The Documents Option

This will allow administrators to assign specific documents from a selected file folder on the drive or directly from the Forms module.

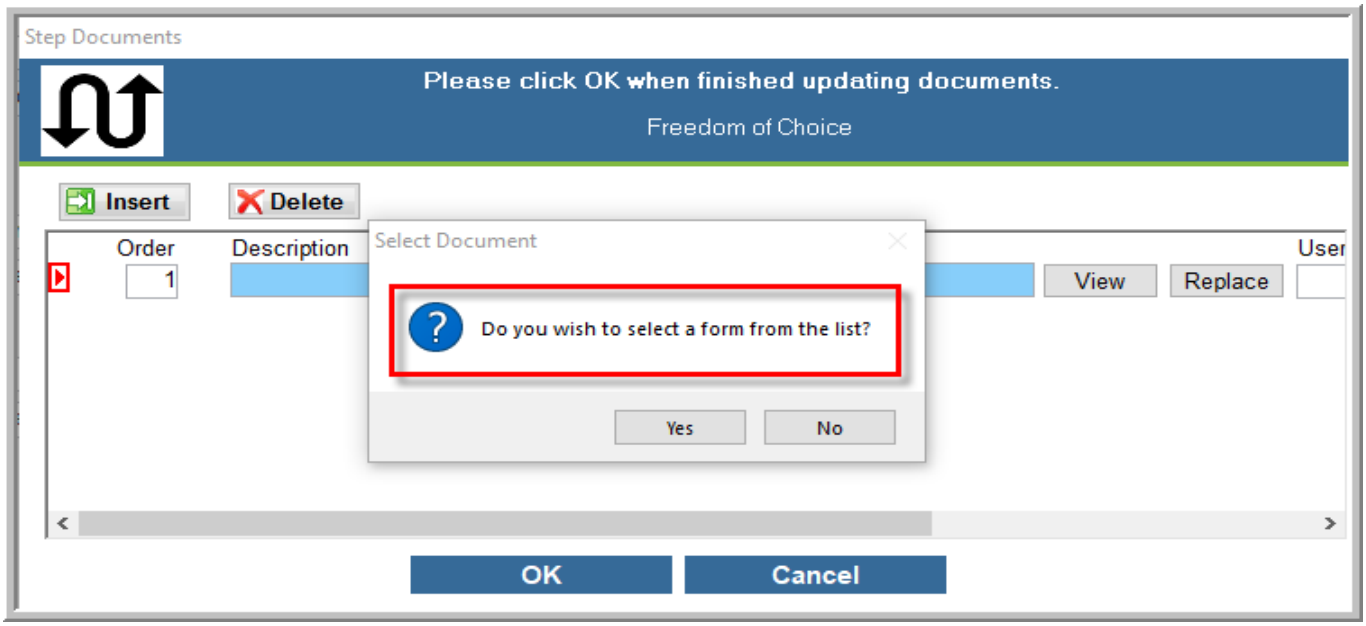
- To add a document to the workflow step, select the number button beside the Documents header.



- When selected, a Step Documents wizard will display.



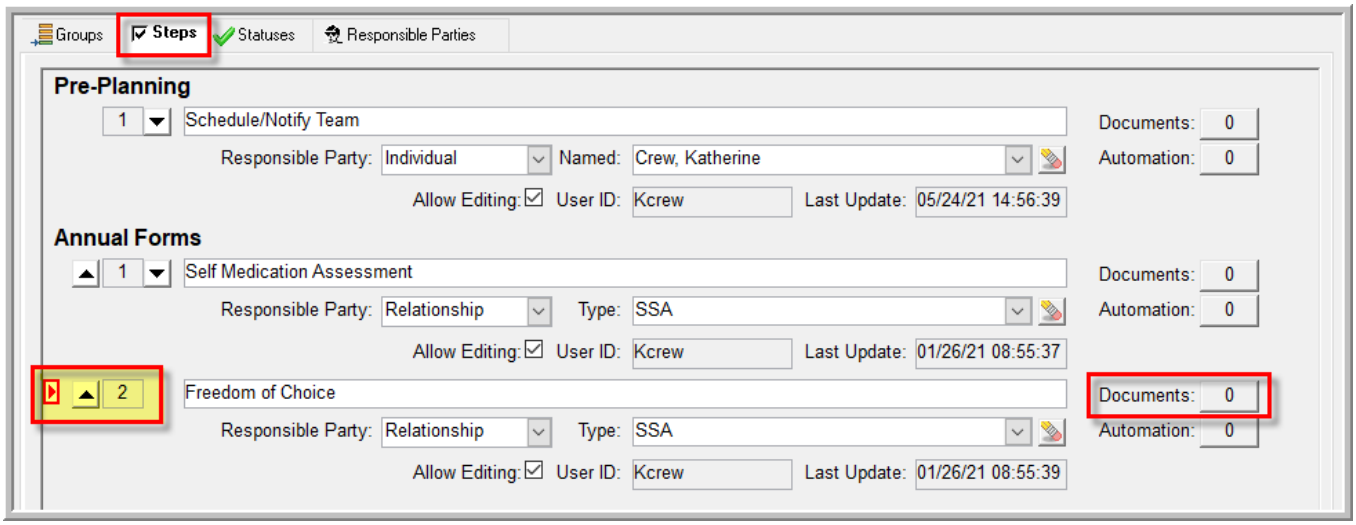
- When the green insert arrow is selected, the Program will ask if the administrator wants to select a form from the list.



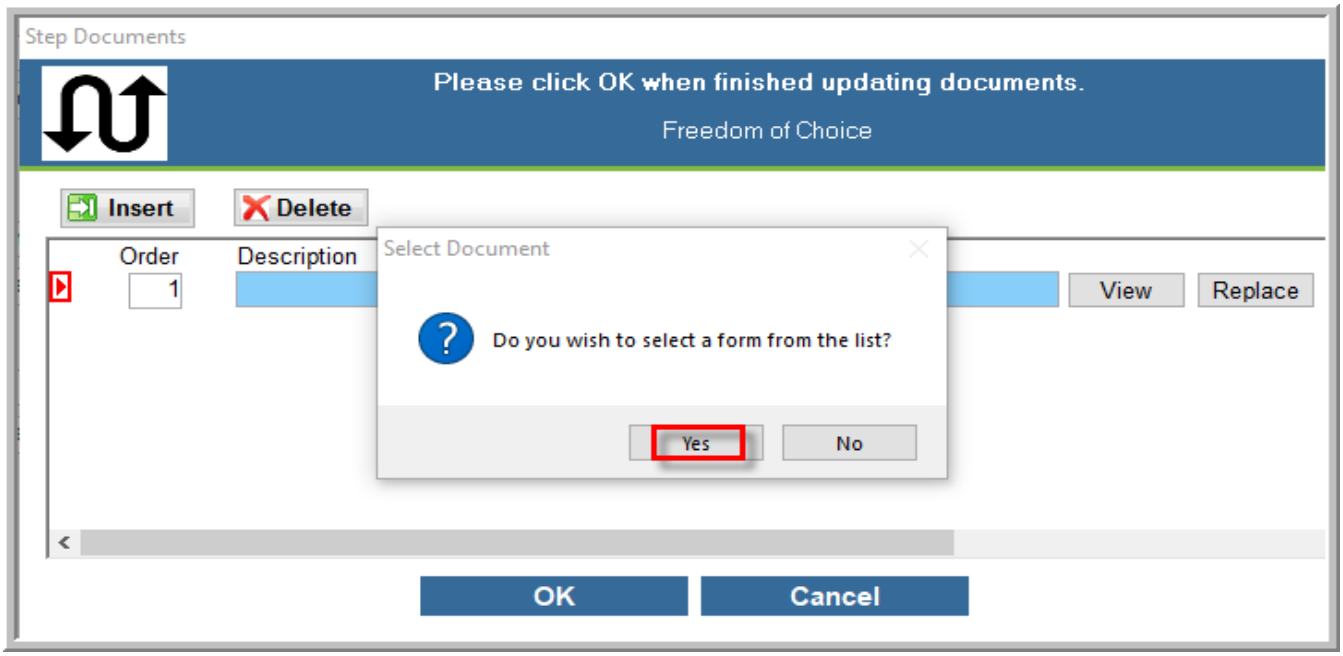
- If the agency is using the Forms module in Gatekeeper and yes is selected, the Forms Roster list will display.
- If No is selected, the administrator will select a document from a file drive.
- Please refer to instructions below for inserting a document.

Inserting a Document from the GK Forms Module

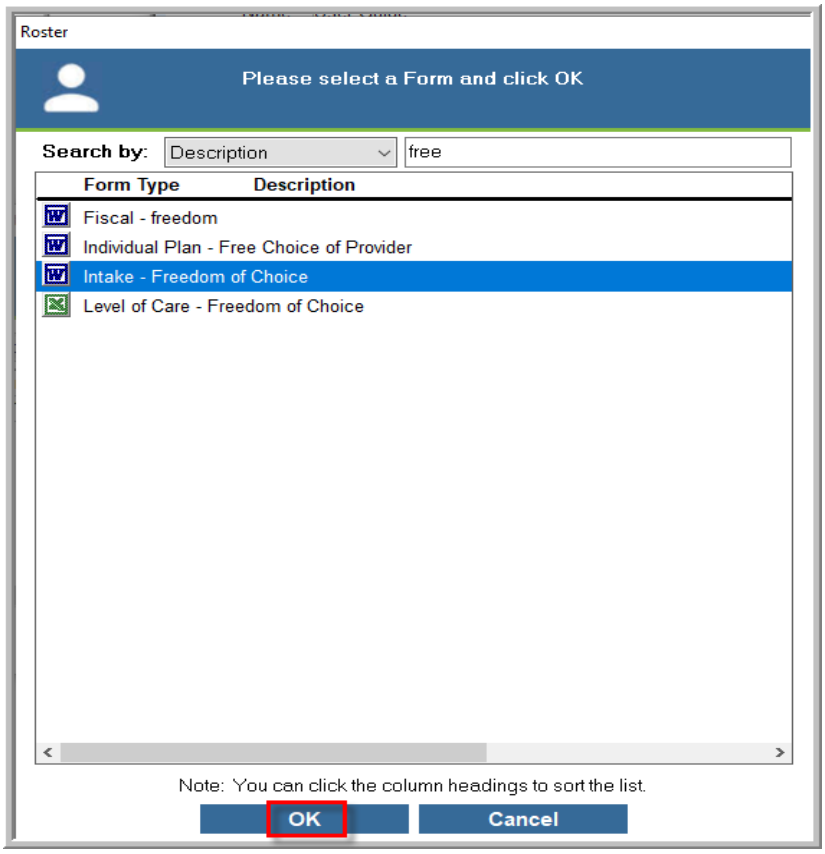
- To add a document to the workflow step, select the number button beside the Documents header.

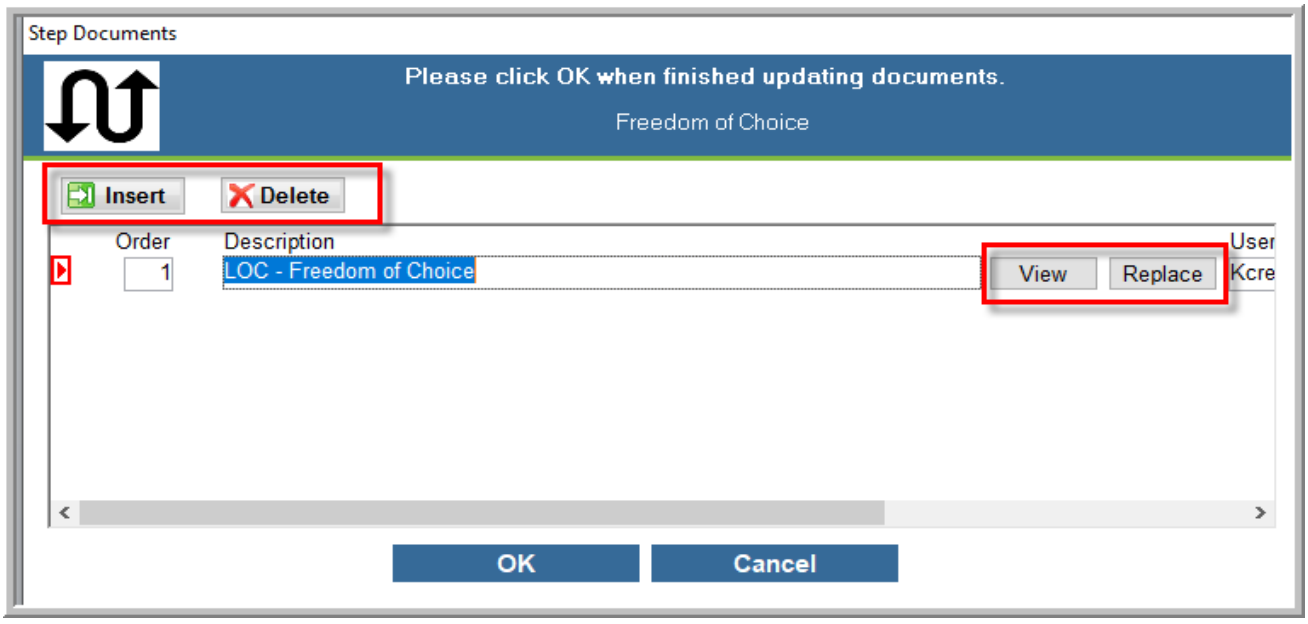


- When selected, a Step Documents wizard will display. When the green insert arrow is selected, the Program will ask if the administrator wants to select a form from the list.



- When yes is selected, the Forms Roster will display.
- Select the desired form by double-clicking the title or single click the title and select OK.

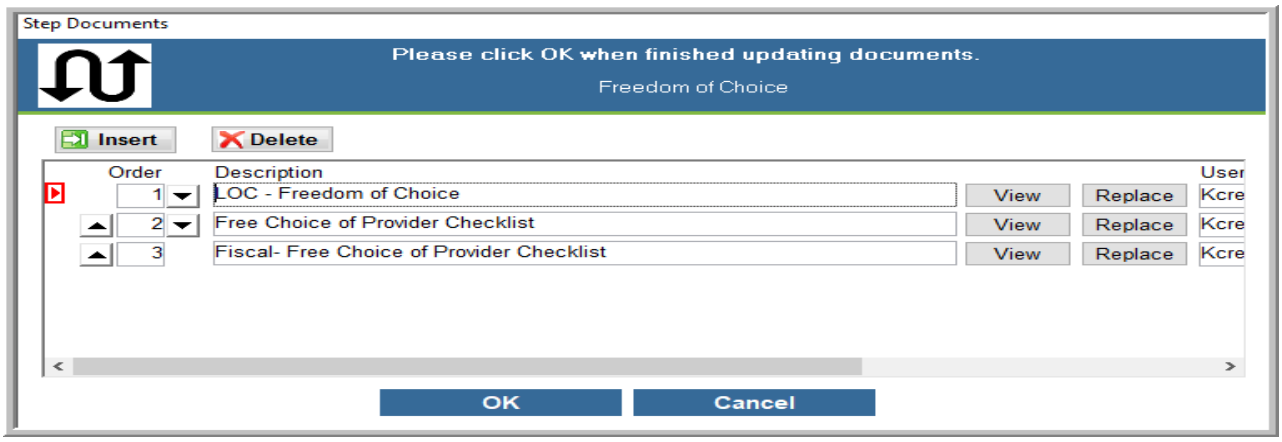




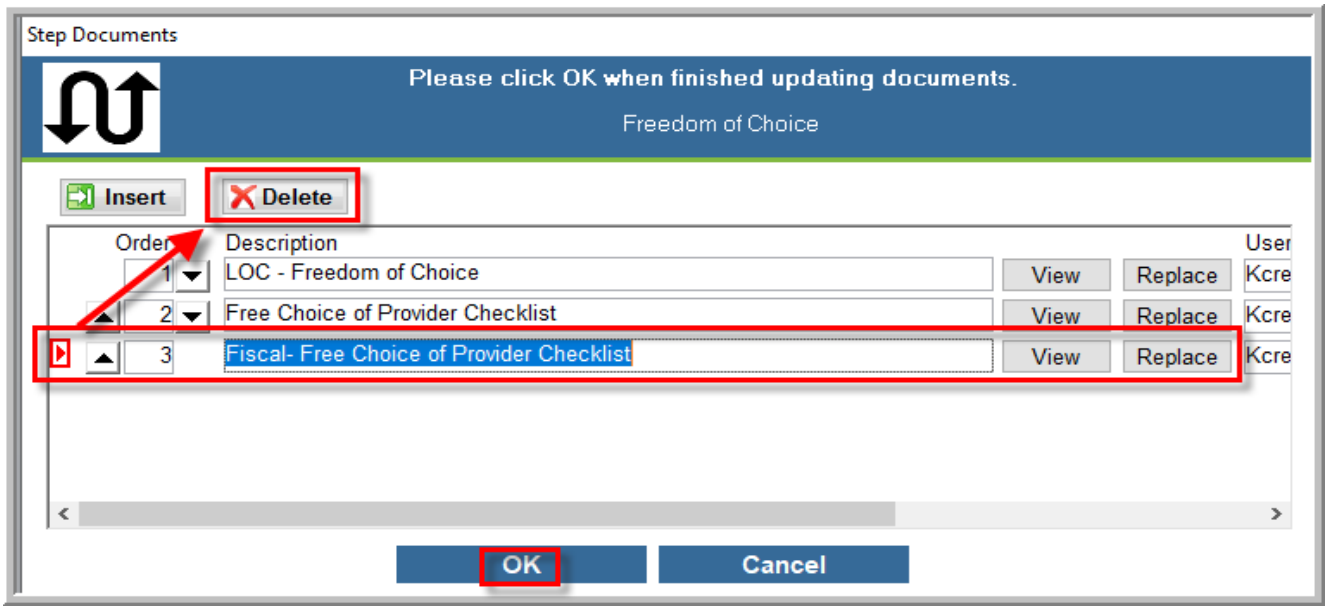
- The form name will populate in the Step Documents wizard.
- The item will display with a View and Replace option.
    - When View is selected, the form will display in the window.

- If replace is selected, administrators will follow the prompts to select a document from either the forms module or file drive.
- Once the desired document has been selected, the description will update to the new document title.

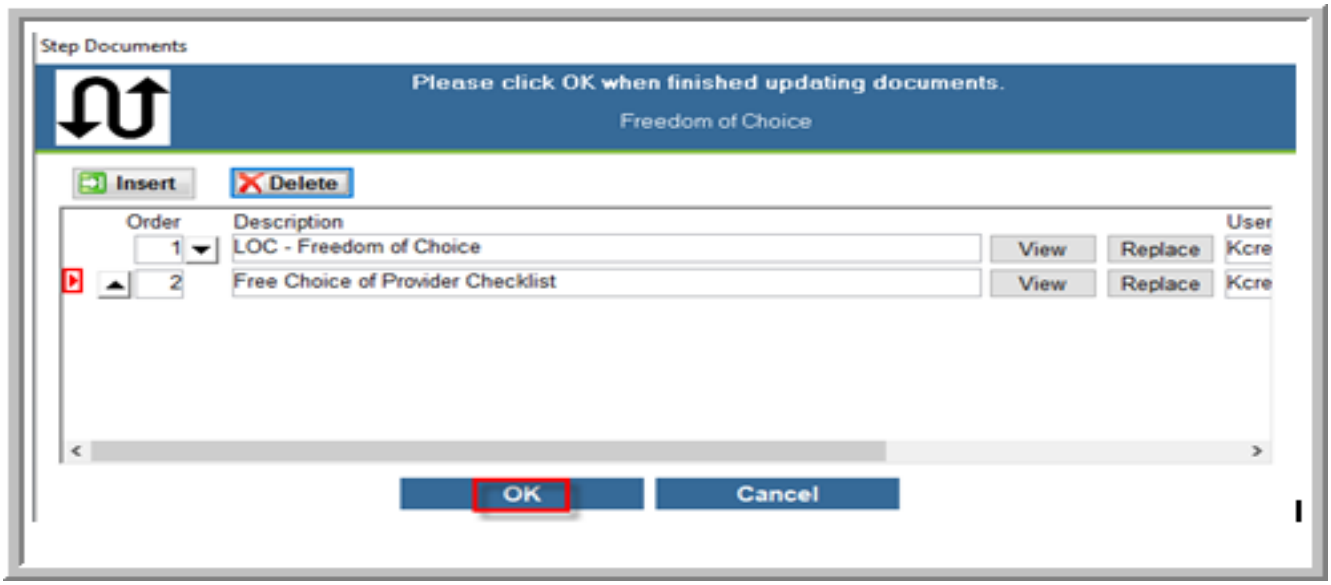
There is no limit for the number of documents that can be assigned on a workflow step.



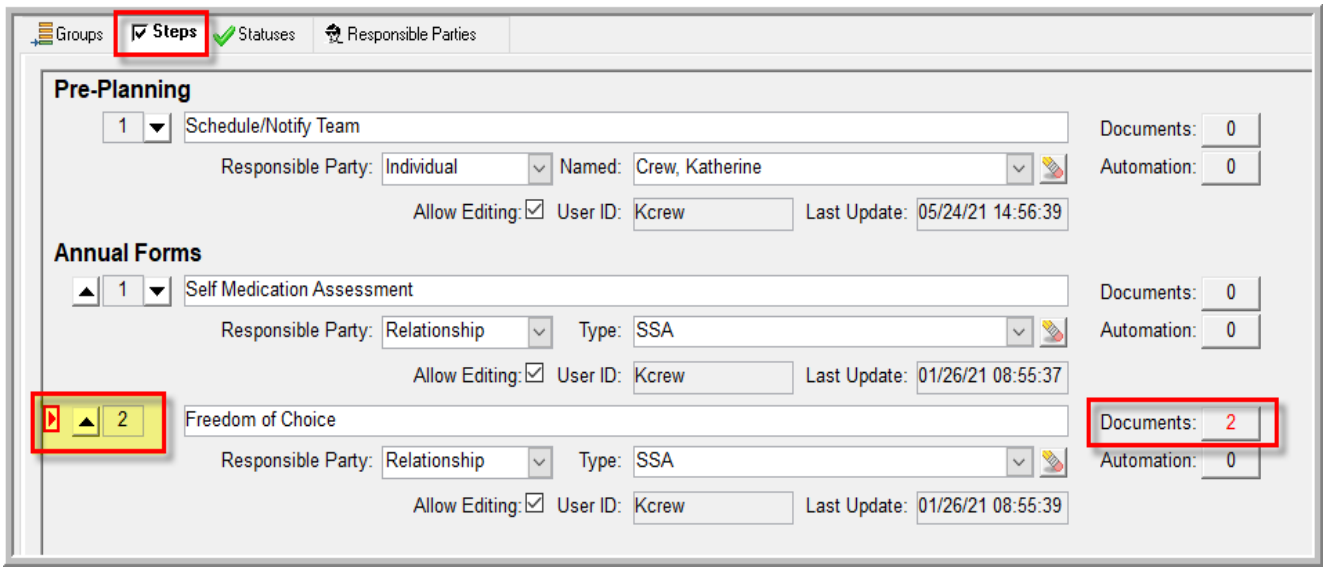
- To delete a document, select the desired line item. The red triangle will indicate the line item that has been selected. Once the line item is selected, select the delete button at the top of the step documents wizard.



- When delete is selected, the line item will disappear automatically. There is no message to confirm deletion in this process. Once all documents have been inserted, select OK.

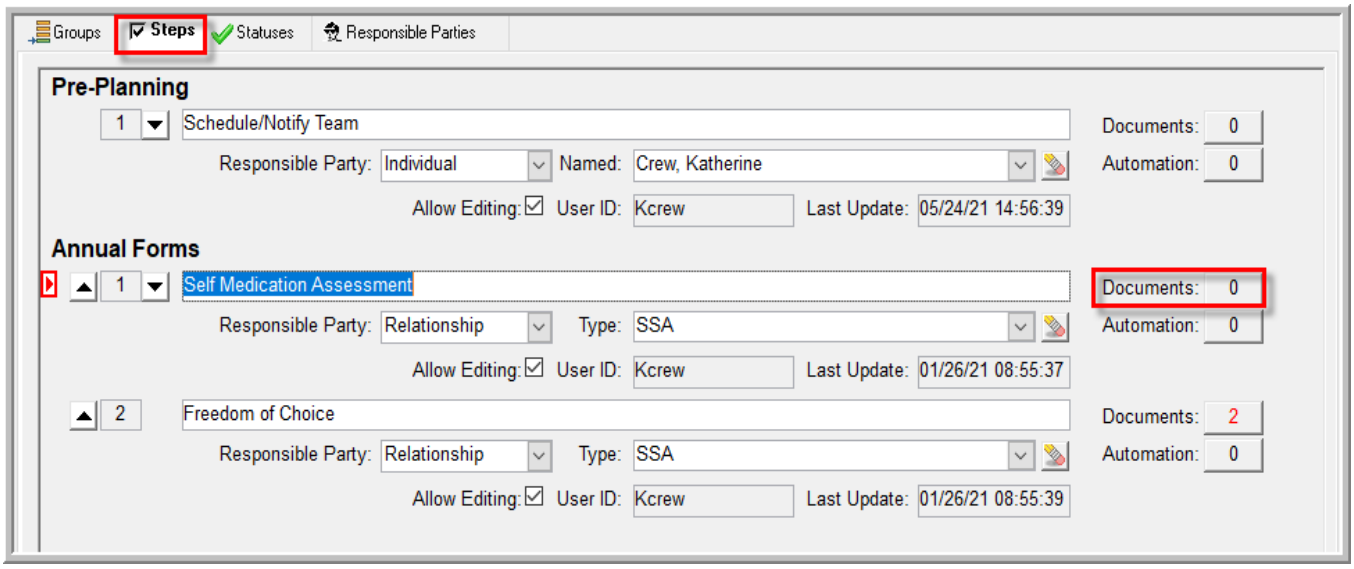


- The user will return to the Steps window. The Documents number is highlighted in red and indicates the number of documents that have been assigned to the workflow step.

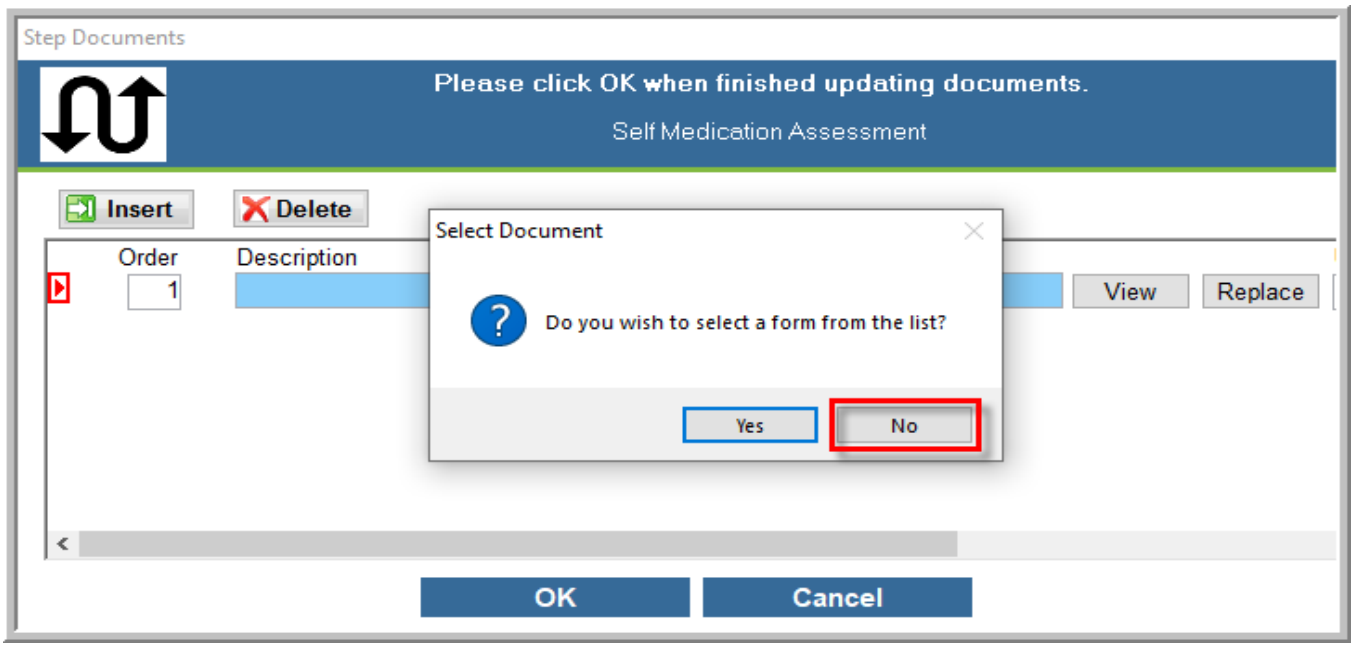


Inserting a Document from File Drive

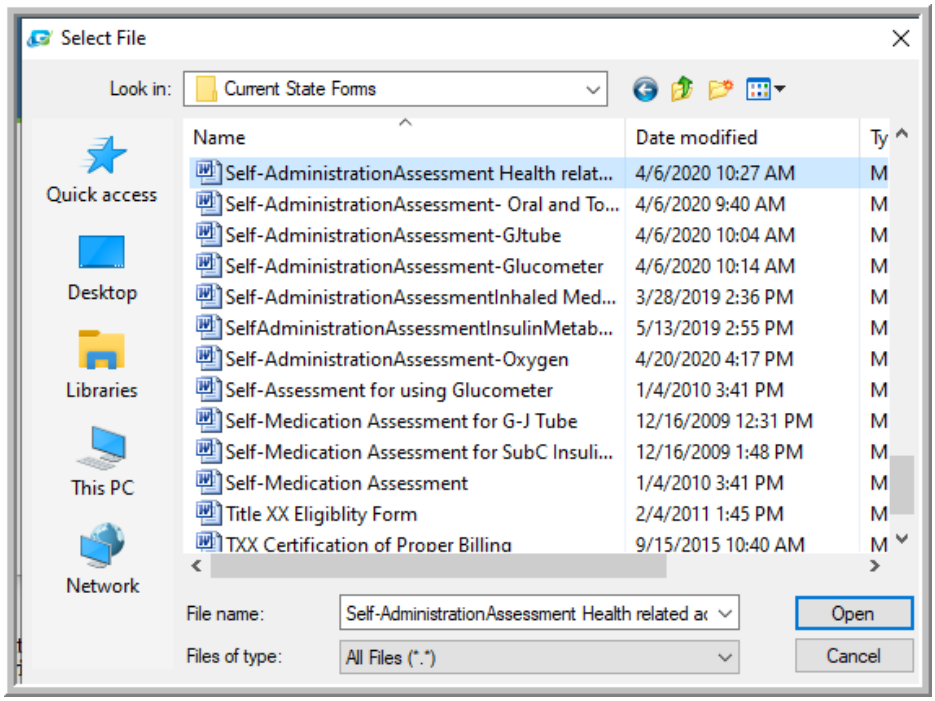
- To insert a document that is not linked to the Forms module, select the number button beside the Documents header.



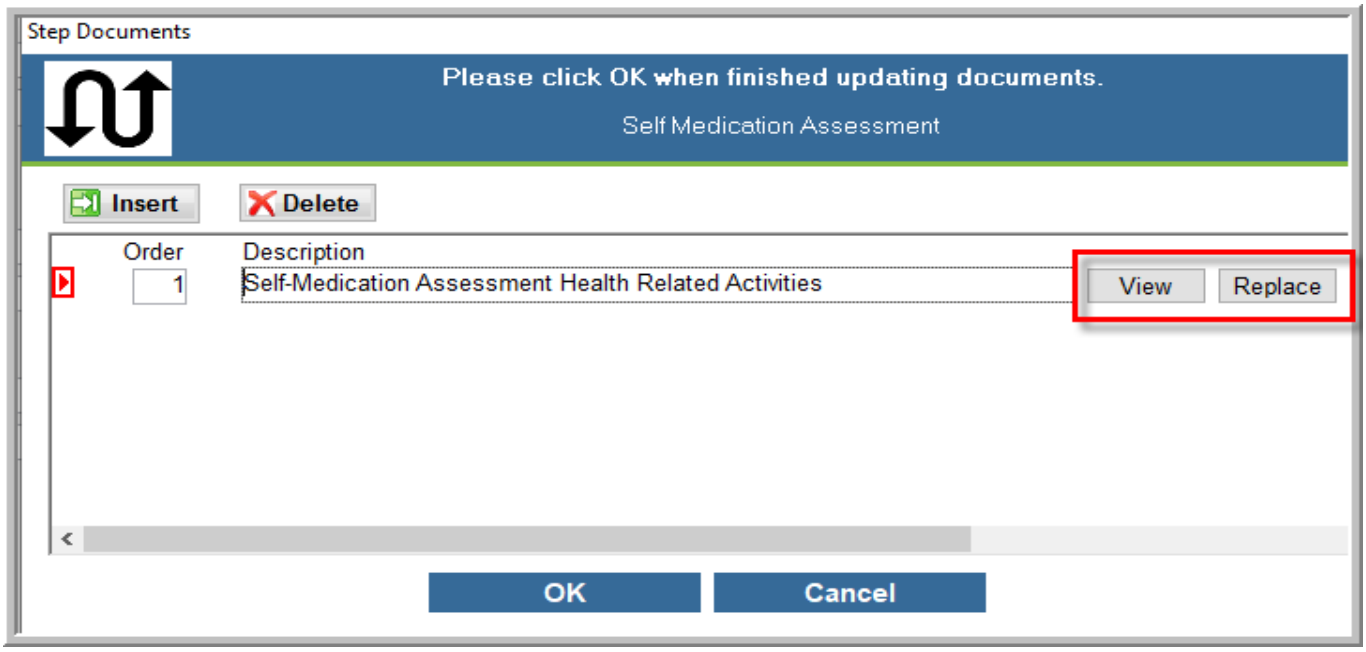
- When selected, a Step Documents wizard will display. When the green insert arrow is selected, the Program will ask if the administrator wants to select a form from the list.



- When no is selected, the file drive window will display.
- Browse to the file folder in which the document has been saved.
    - Double click the desired document.



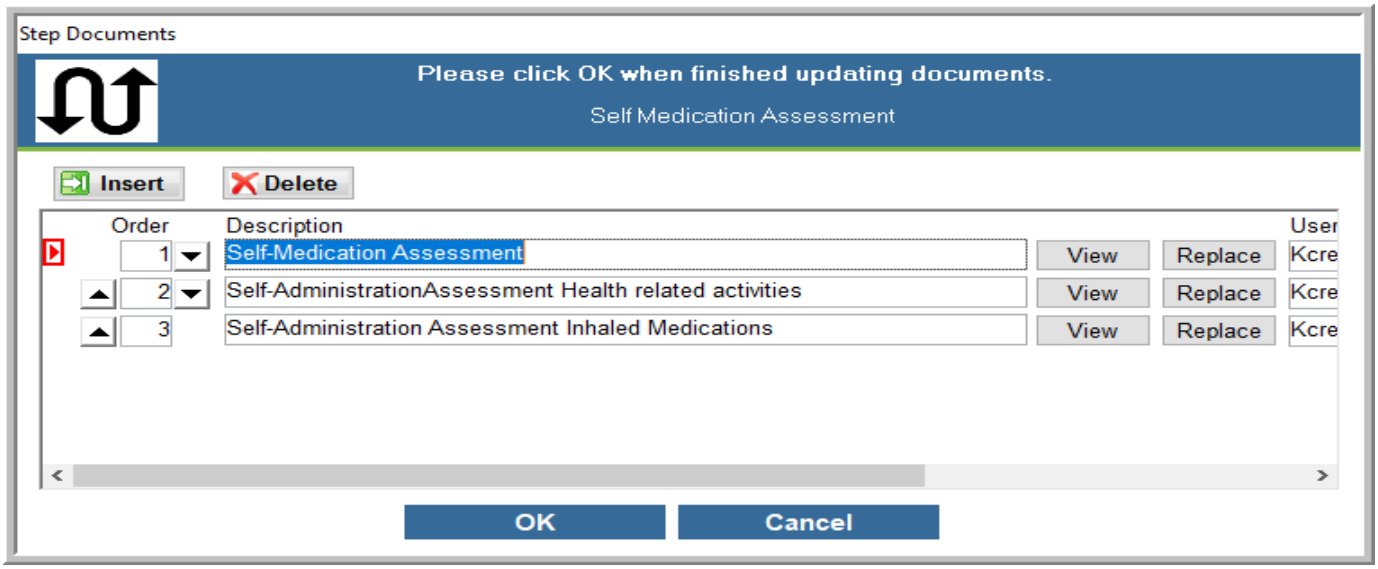
- When selected, the user will return to the Step Documents window and the file name will display in the description field.



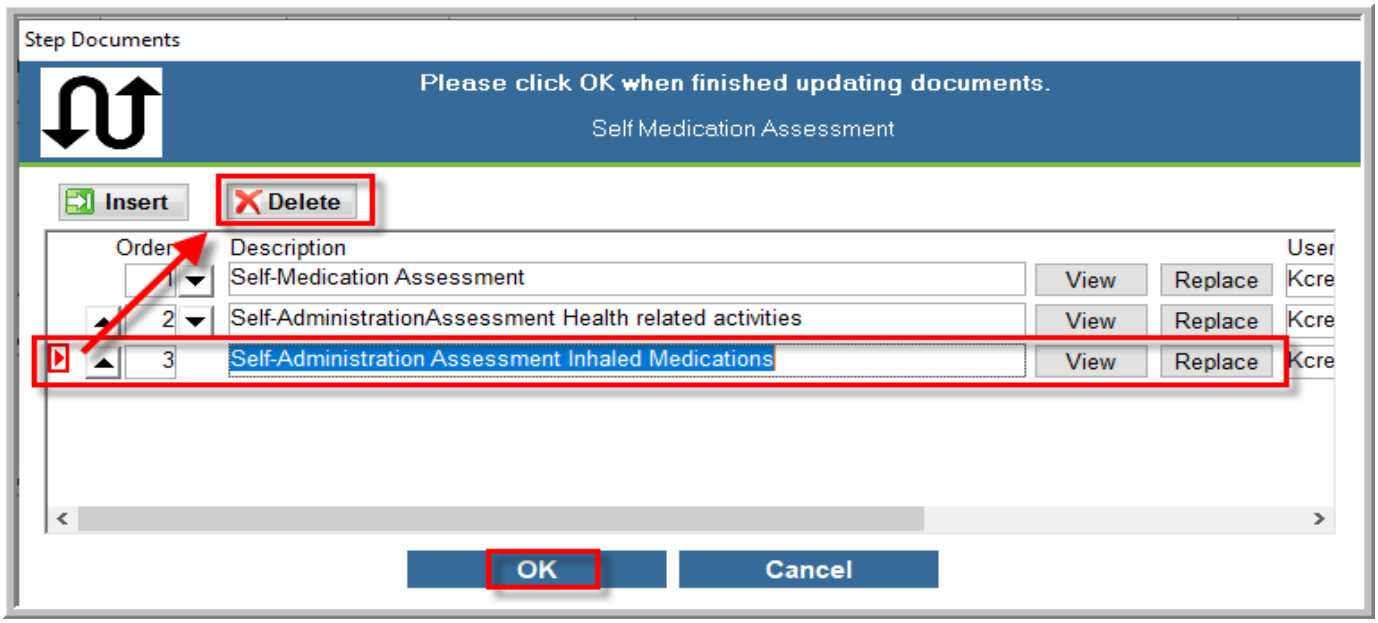
- The item will display with a View and Replace option.
    - When View is selected, the form will display in the window.
    - If replace is selected, administrators will follow the prompts to select a document from either the forms module or file drive.

- Once the desired document has been selected, the description will update to the new document title.

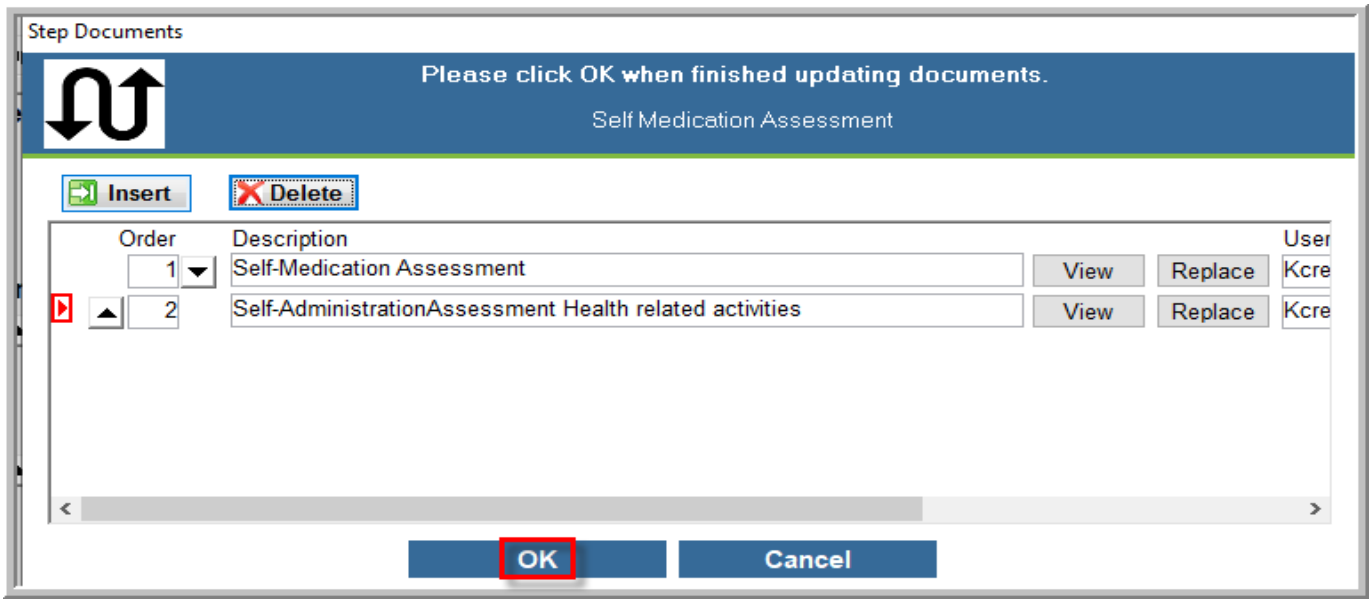
There is no limit for the number of documents that can be assigned on a workflow step.



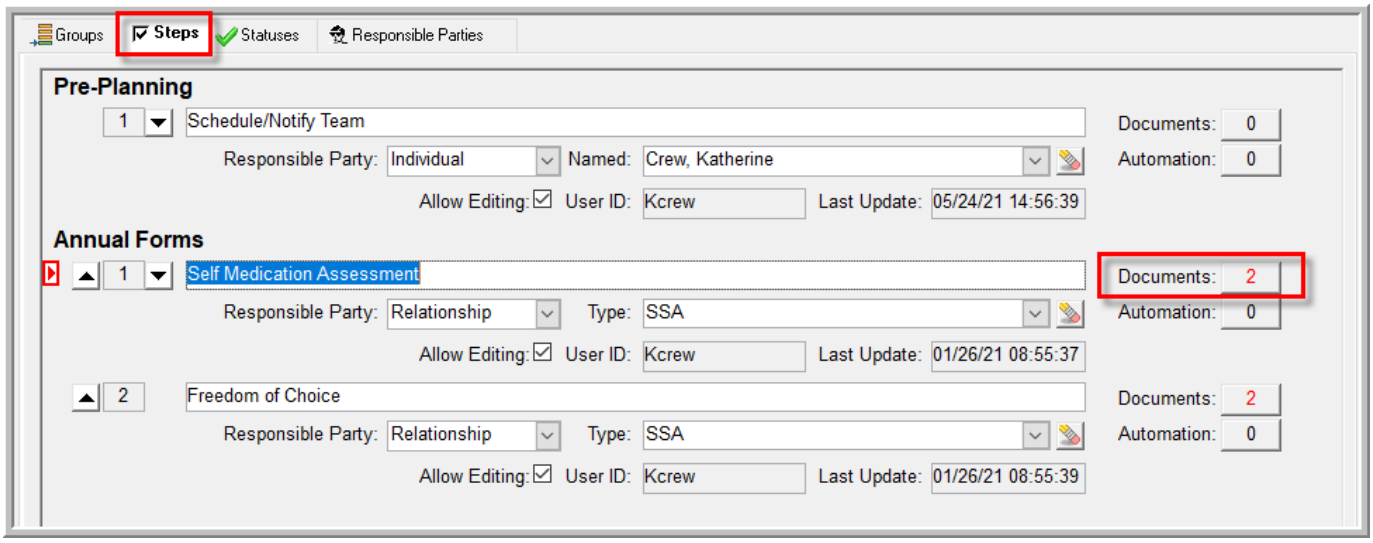
- To delete a document, select the desired line item.
- The red triangle will indicate the line item that has been selected. Once the line item is selected, select the delete button at the top of the window.



- When delete is selected, the line item will disappear automatically.
    - There is no message to confirm deletion in this process.



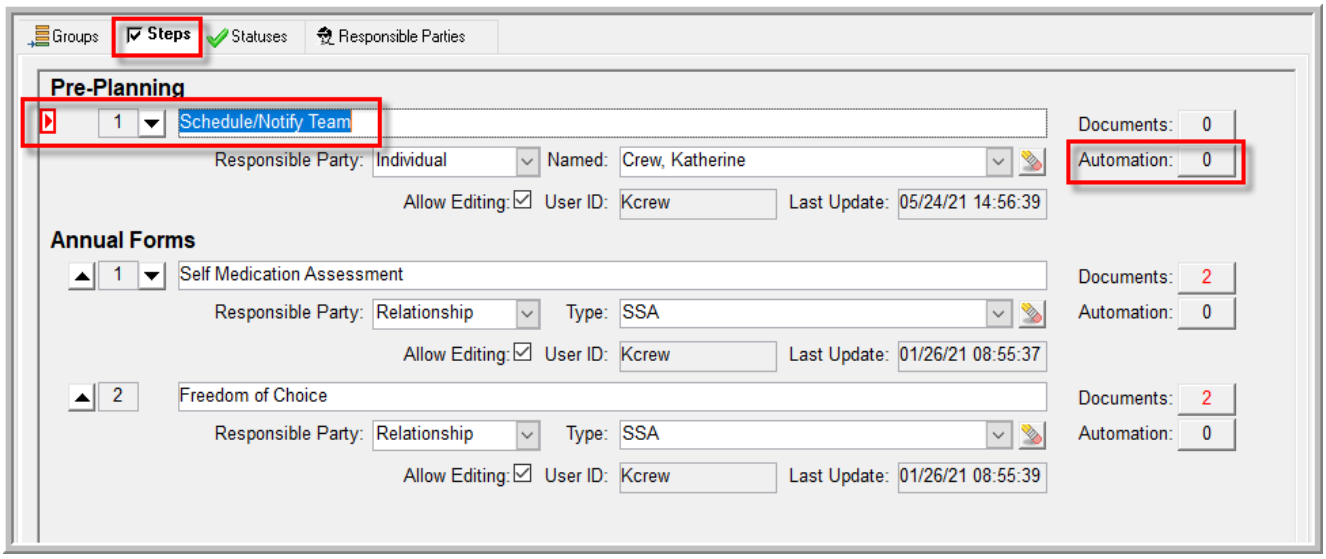
- Once all documents have been inserted, select OK.
- The user will return to the Steps window.
    - The Documents number will be highlighted in red and indicate the number of documents that have been assigned to the workflow step.



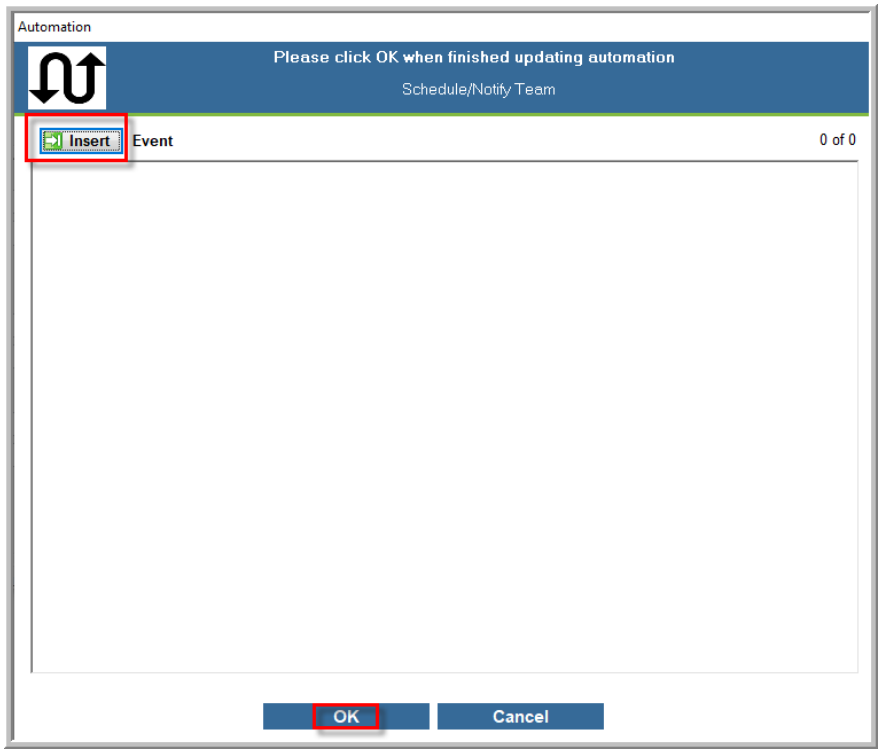
Assigning Automation

The Automation feature will allow administrators to assign events to a specific workflow step. The administrators can setup the events to trigger actions steps within the workflow process.

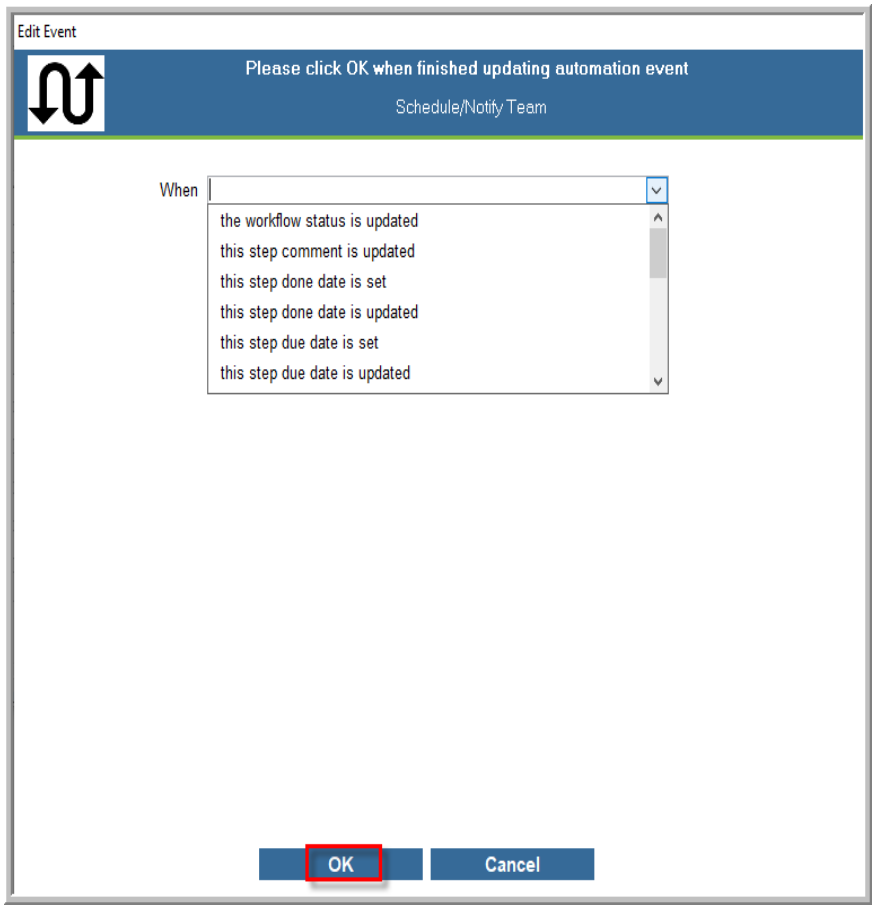
- Select the Automation button.



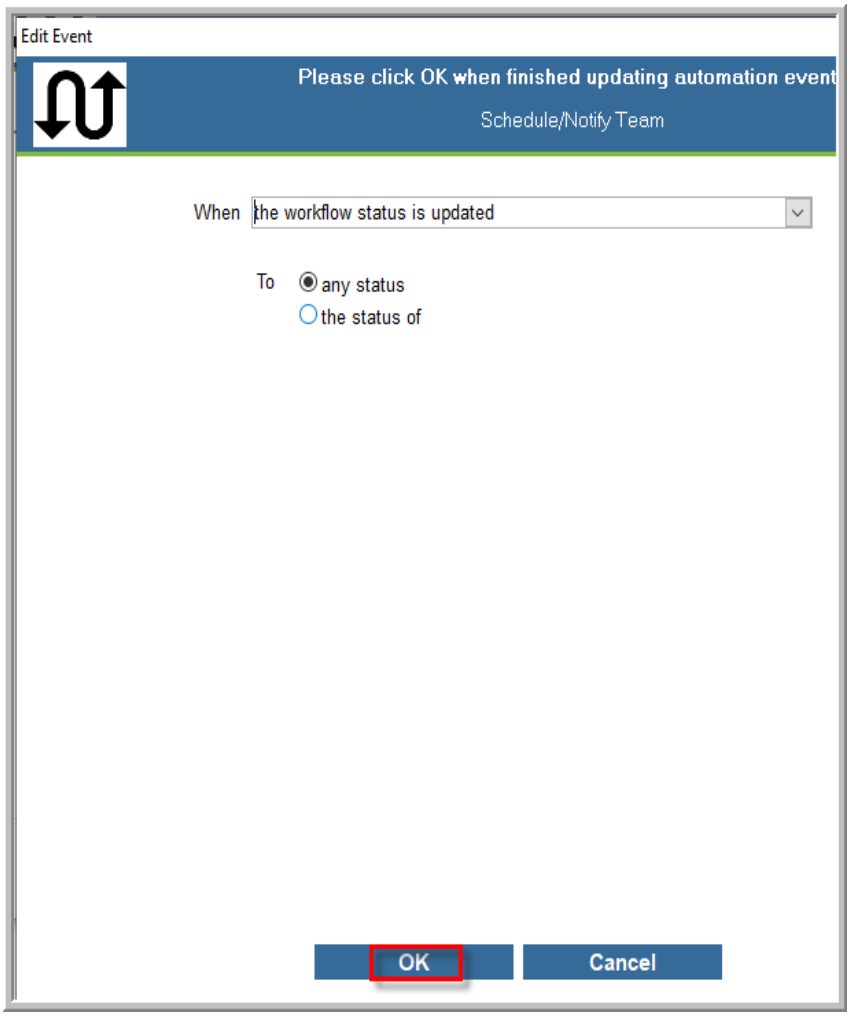
- When selected, an automation wizard will display. Select the green insert arrow to assign the criteria to the automation process for the step.



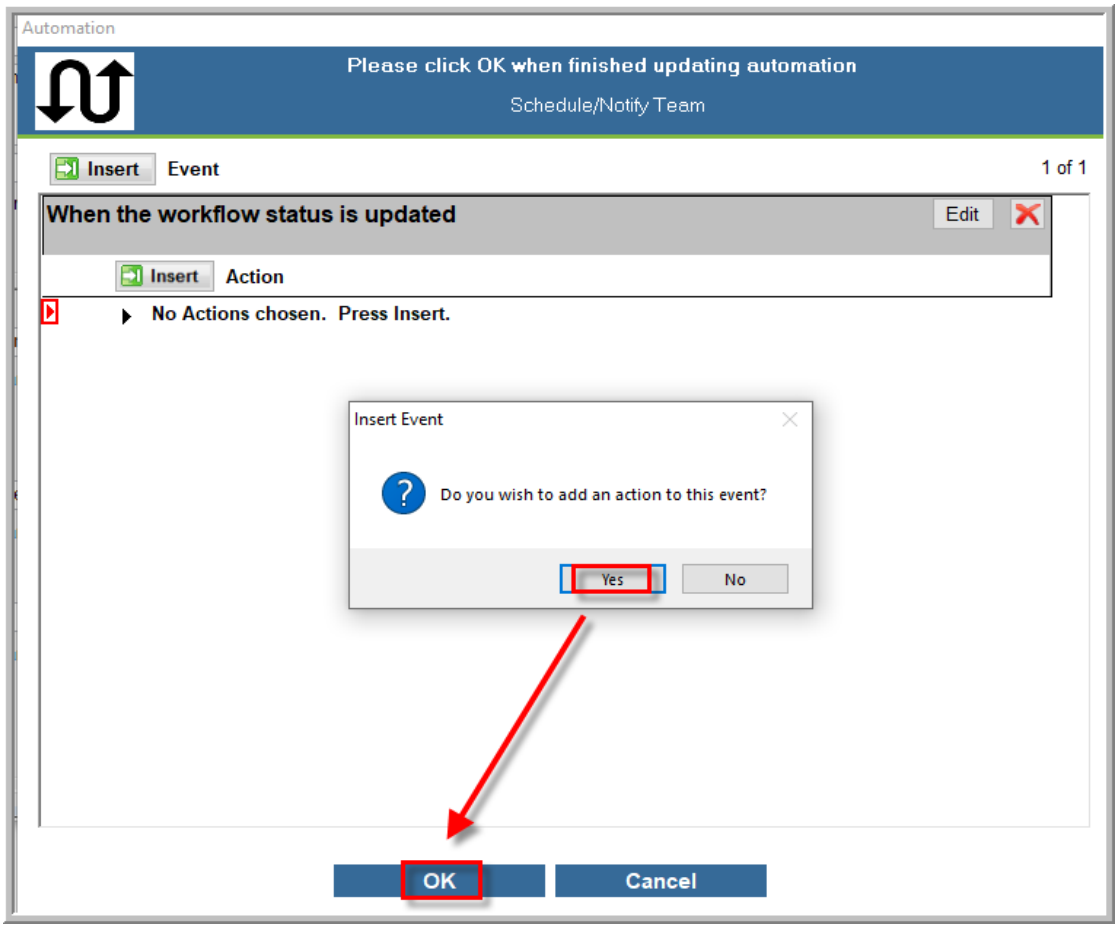
- The wizard will display the Edit Event window. Use the drop down arrow to select from the available options for assigning the “When” event criteria.



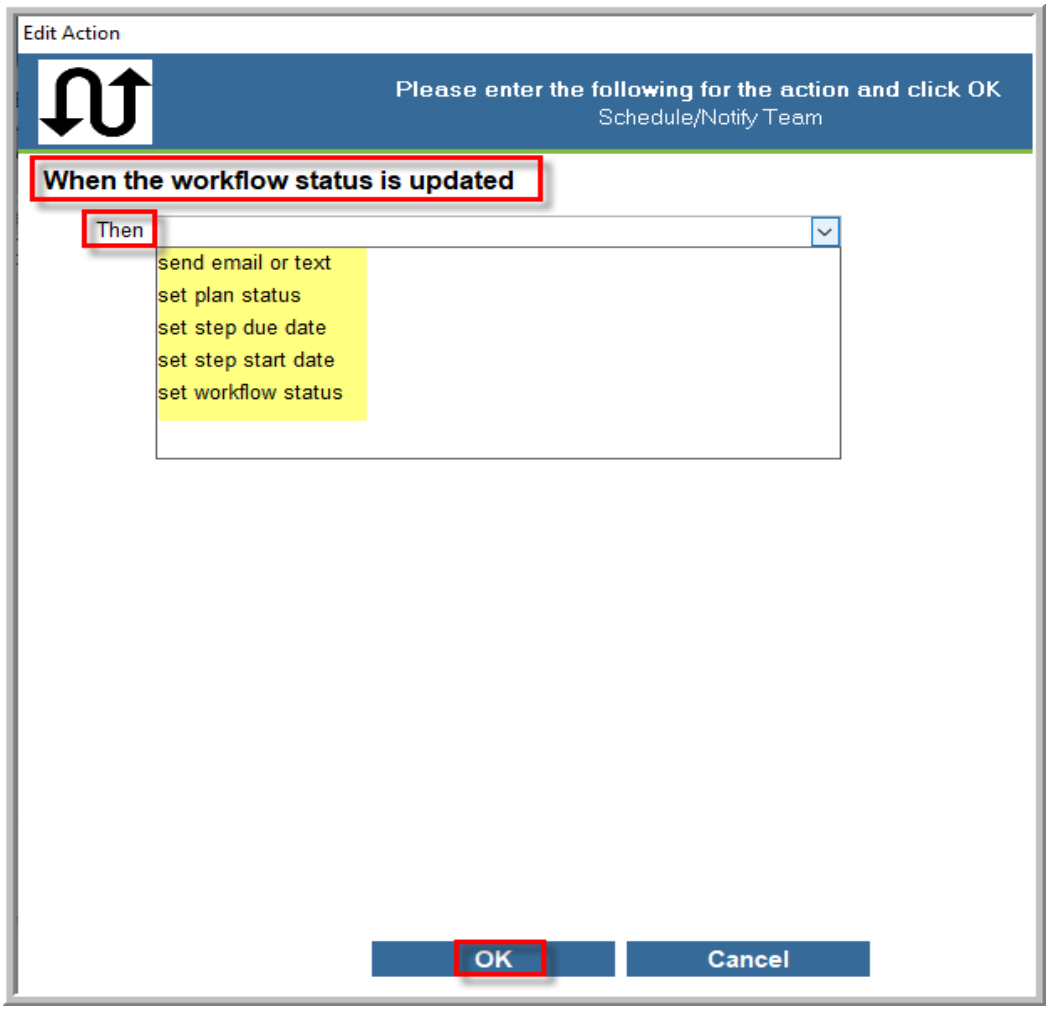
  - For example, Select the “When the workflow status is updated” event.
  - When selected, an option will display to assign this process to “Any status” or “the status of”.
  - Select Any Status. Once the desired options have been assigned, select OK.



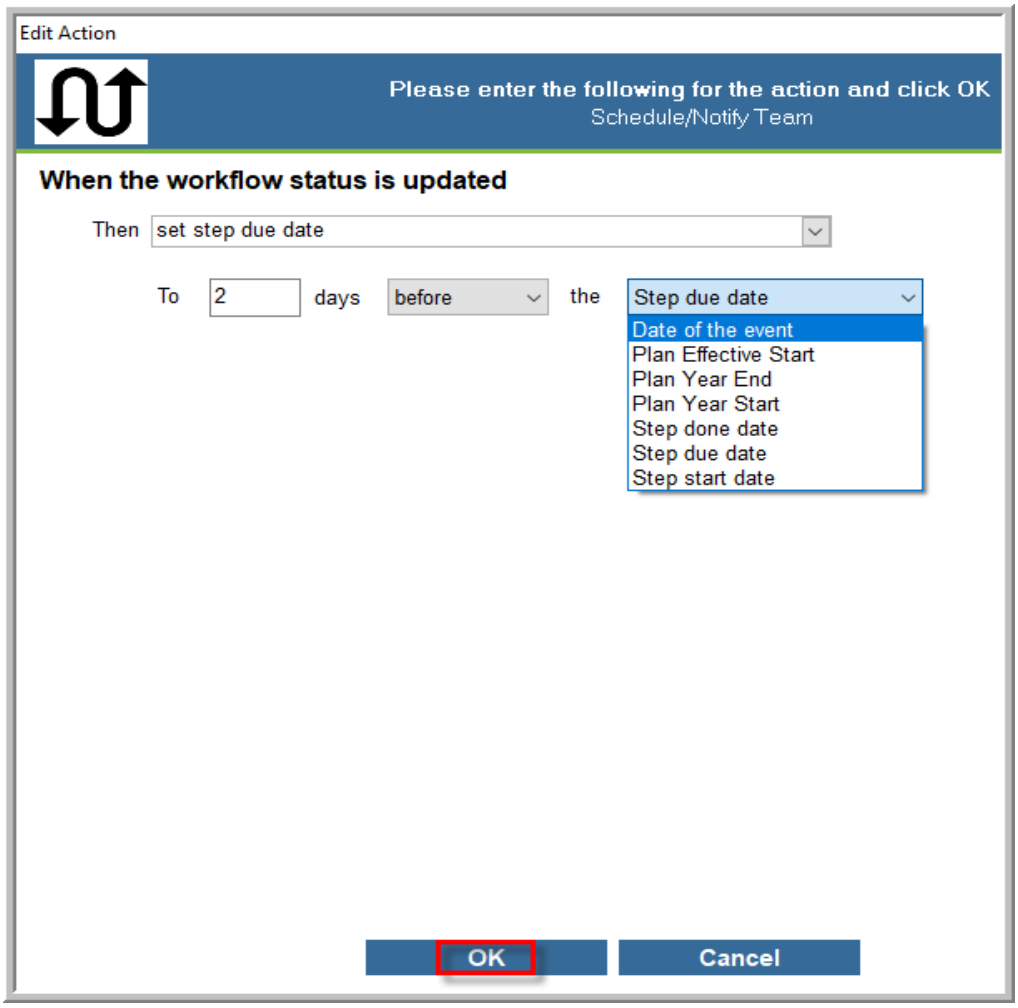
- When OK is selected, a message will display asking the user if an action needs to be added to the event. If yes is selected, administrators can assign criteria for the workflow status update.



- Read the sentence formatting and Use the drop down arrow to assign the "Then" options to complete the step.

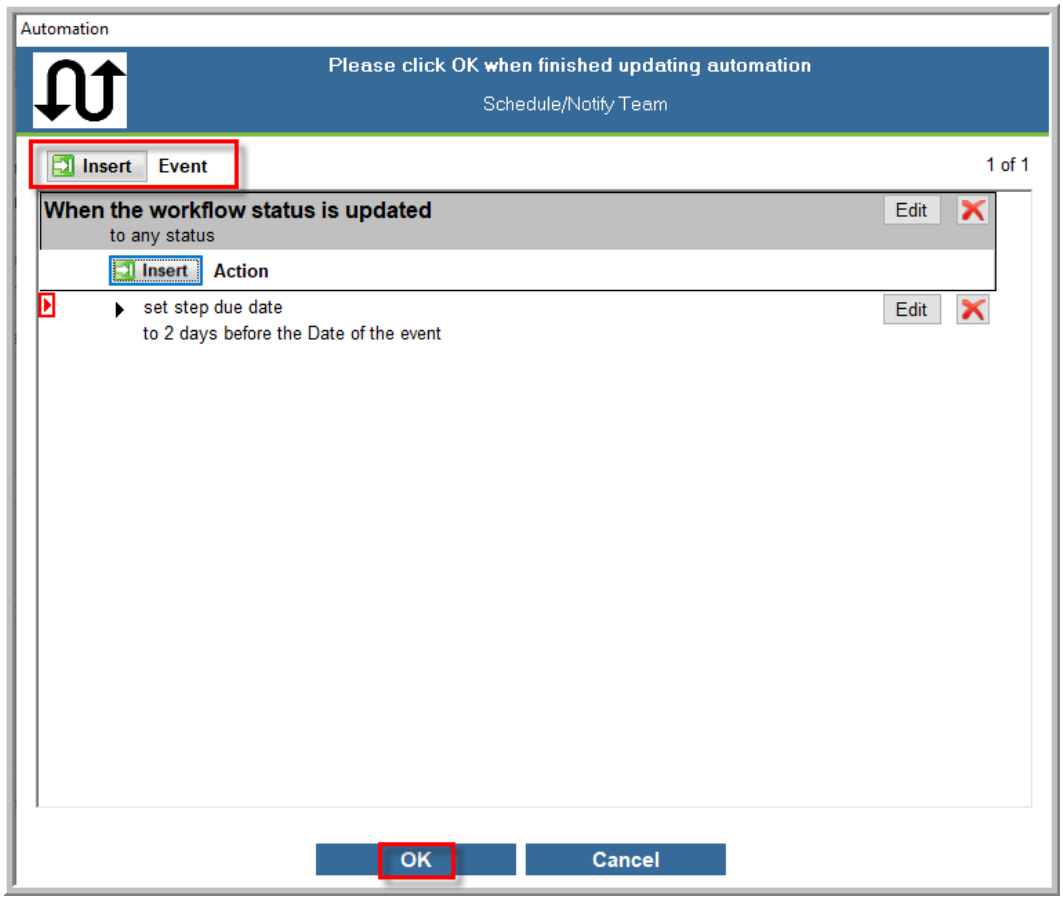


- The available event options are: Email or text staff, Set Plan Statuses, Set Step Due Dates, Set Step Start Dates, and Set Workflow Statuses.
- For this example, "WHEN THE WORKFLOW STATUS IS UPDATED" THEN, select the "Set Step Due Date".

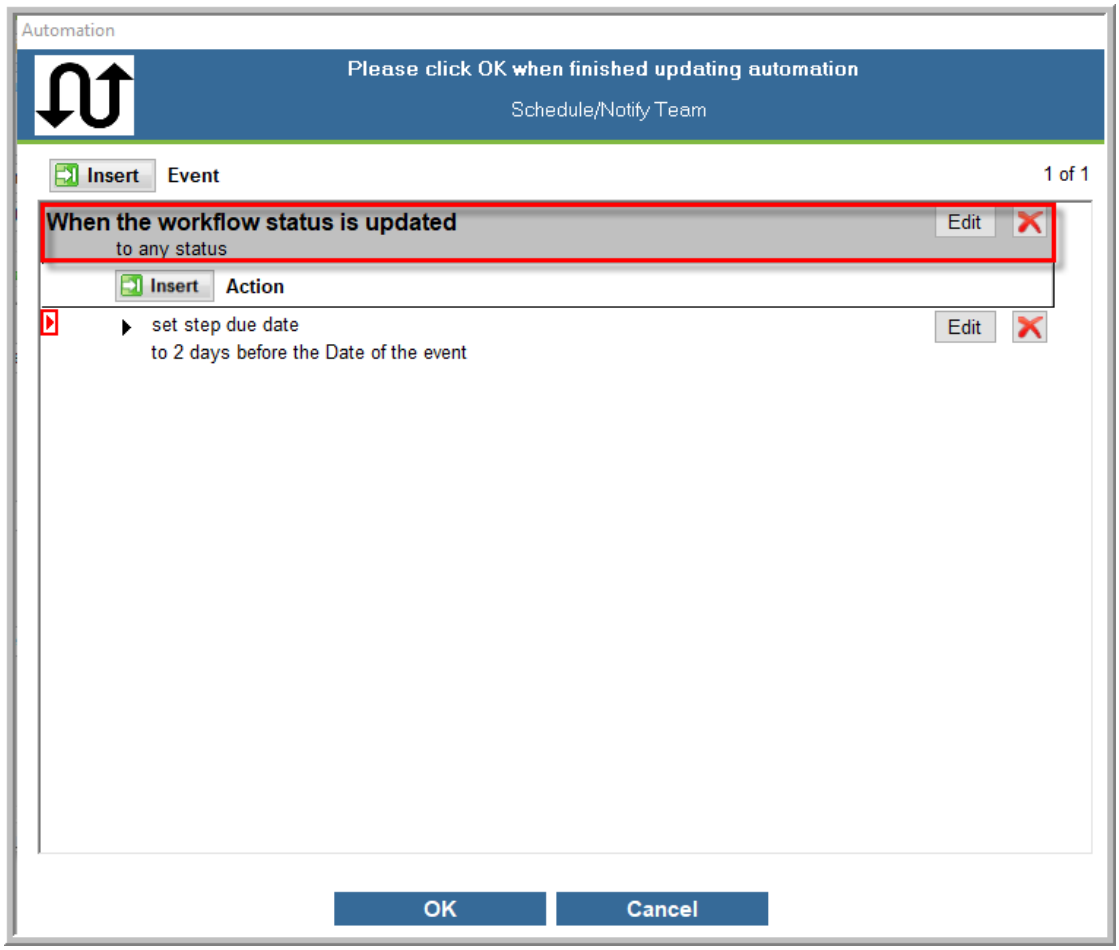


- Once this is selected, insert the date criteria for the step and select OK when finished. Once the desired criteria have been inserted, the details will display on the automation wizard.

- At the top of the Automation Wizard, there is an Insert button and an Event title.
  - If an additional event needs to be inserted for this step, select the green insert arrow and follow the previously reviewed instructions for adding an action item.

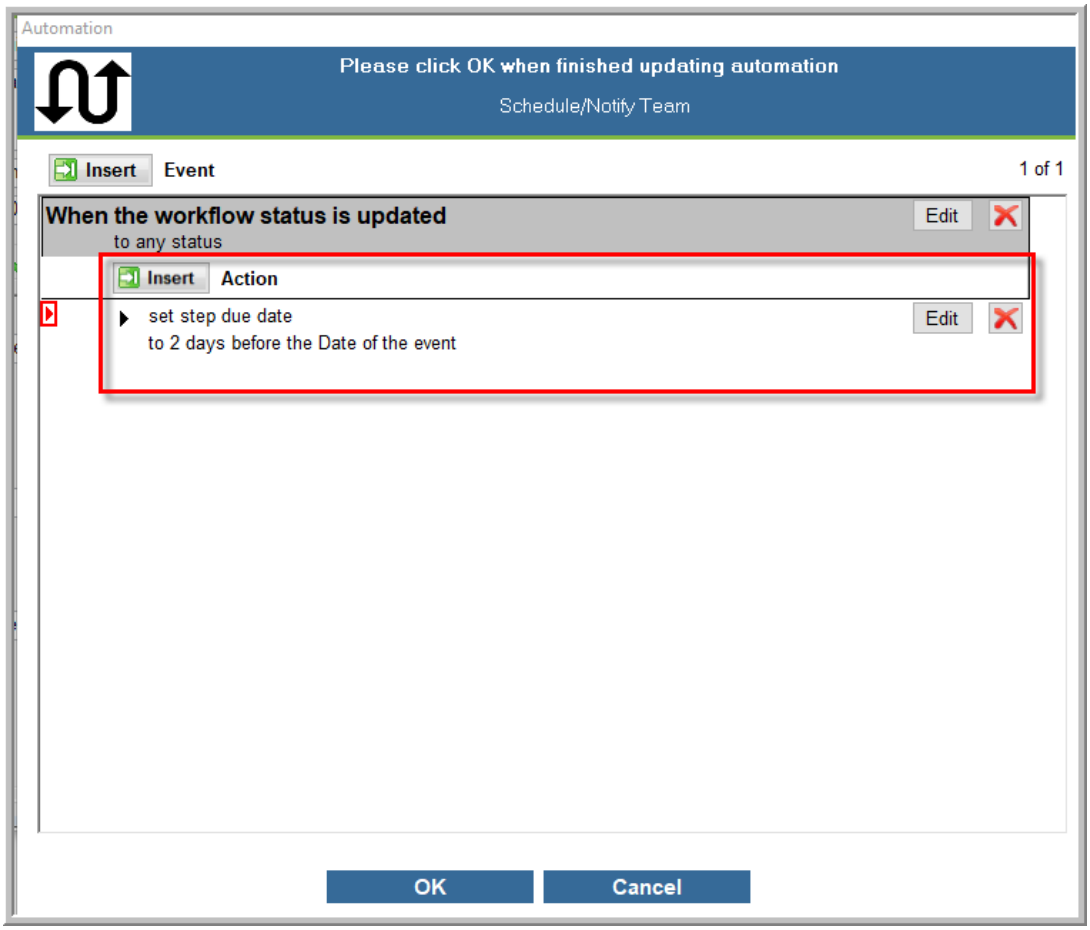


- If an Event has already been created, The Event title appears in bold and will appear within the gray header.
- The gray header also displays an Edit button and a red X button.

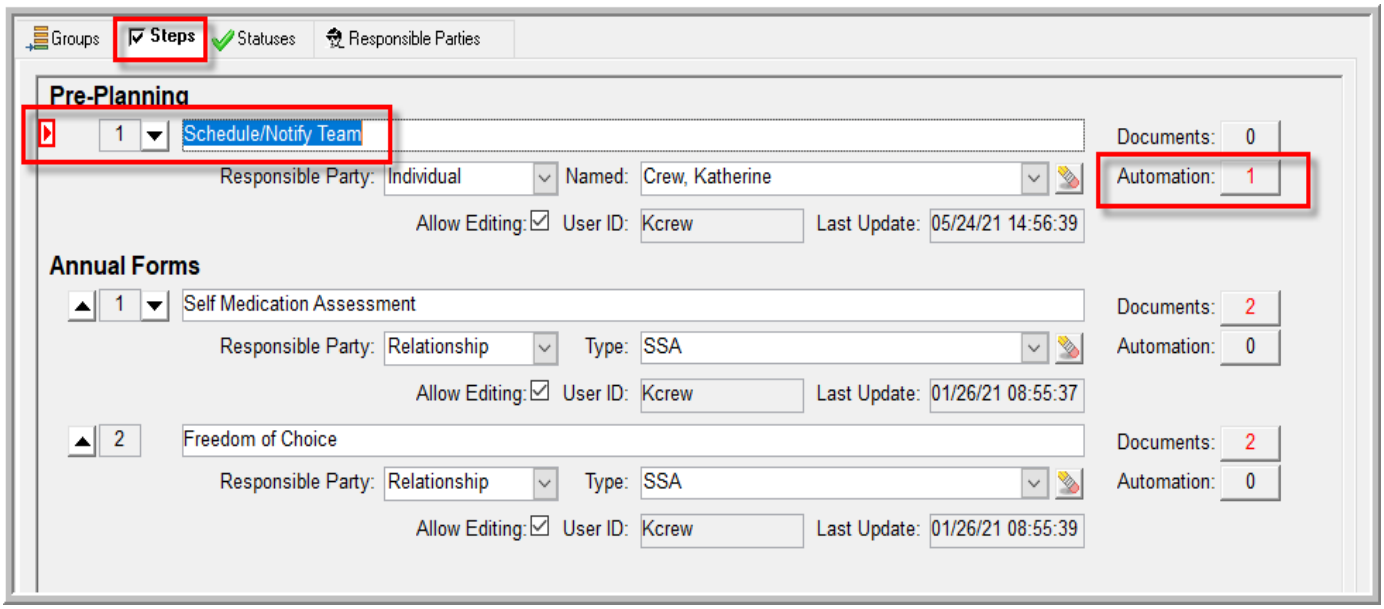


- If the edit button is selected, the administrators can change the Event type by using the drop down arrows to assign the new "When" criteria.
- Once OK is selected, the Event title will update in the Automation wizard. If the red x is selected, a message will display to confirm deleting the Event and all related action items.
- If yes is selected, the items will disappear from the Automation window.

- The Action items will display below the Event header.



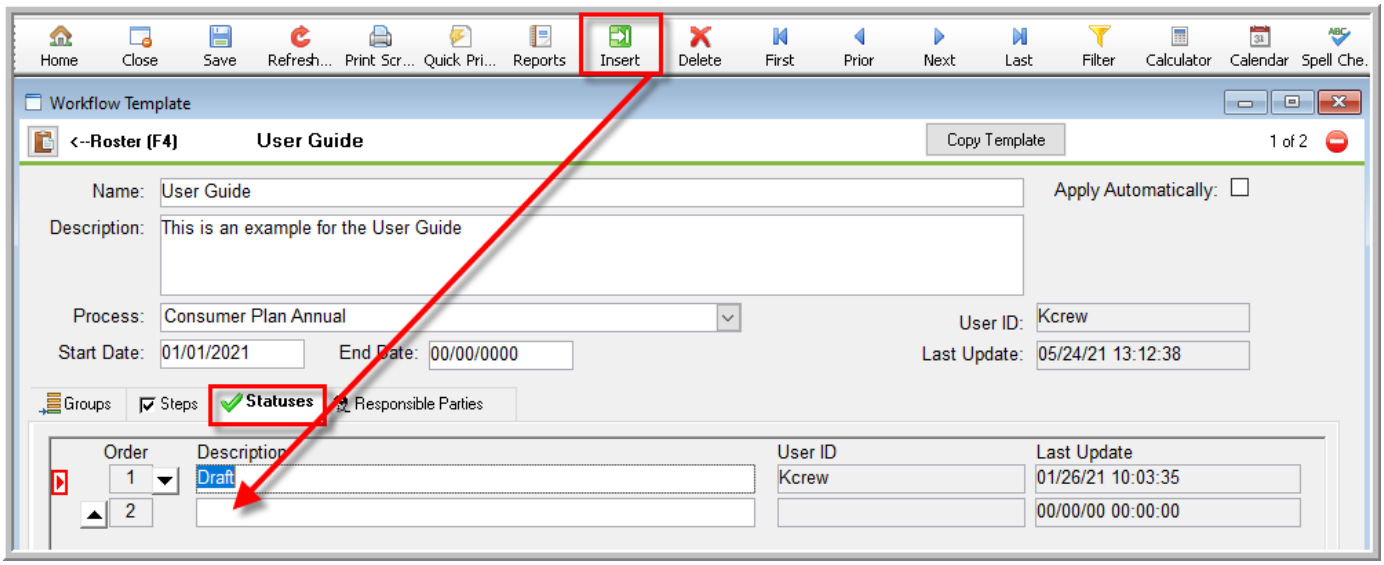
- There is an insert button next to the Action header.
    - If insert is selected here, this will allow administrators to insert another action item for the event.
    - Once the action item has been inserted, the item will display in the Automation wizard.
    - Each action item has an Edit button and red x.
    - When the edit button is selected, administrators can use the drop down arrow to assign a different action.
    - Once OK is selected, the information will update and display in the automation wizard.
    - If the red x is selected, the action item will be automatically deleted. There is no message to confirm deletion in this action.
    - When all event and action steps have been assigned, select OK. The administrators will return to the Steps window.
- The Automation button will display a number highlighted in red. This Automation number indicates the number of events assigned for the step.



The Statuses tab

This tab will allow administrators to assign desired statuses to the workflow template. These statuses will drive future plan assessment alerts.

- To insert a status, use the green insert arrow in the toolbar or CTRL I on the keyboard. A line item will insert for the Status description.



- If more than one status is inserted, the Order arrows will allow administrators to move items into priority order.
- If a status needs to be deleted, select the desired status.

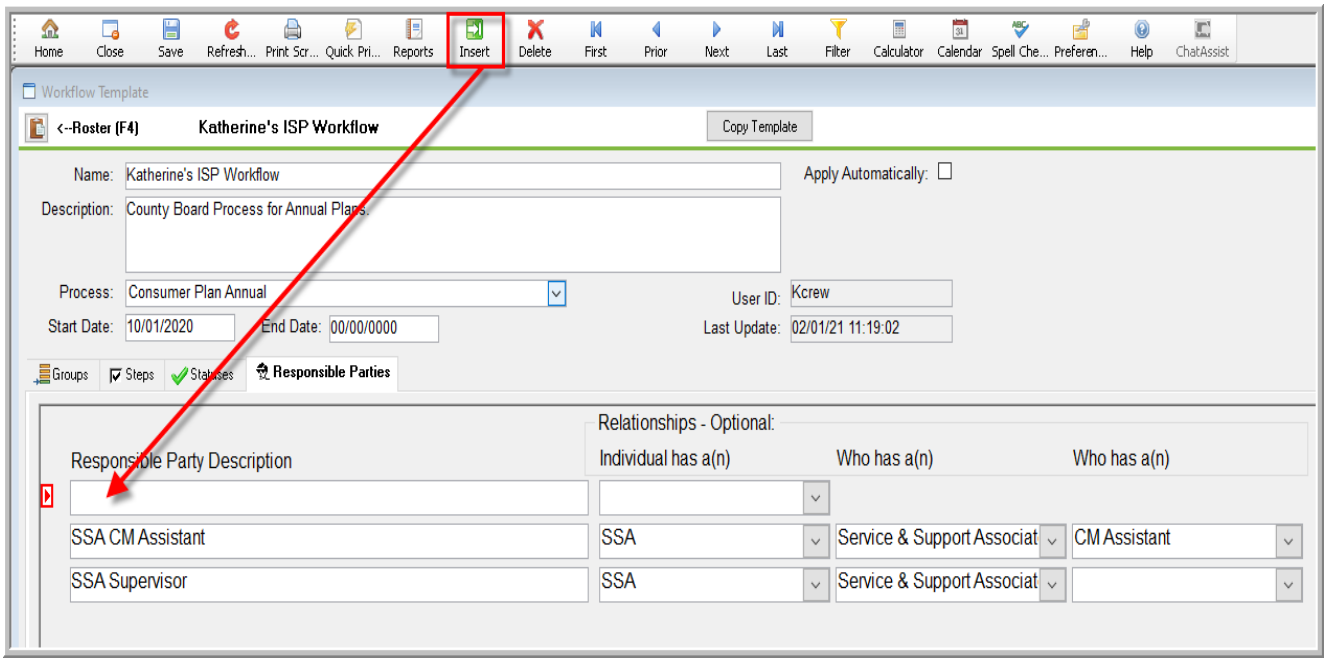
- The red triangle will indicate the line item that has been selected. Once the line item is selected, select the delete button in the toolbar.
- When delete is selected, a message will display to confirm the deletion. Select yes or no to delete the status.
- If yes is selected, the status will be deleted. To save these changes, select the save button in the toolbar or use CTRL-S on the keyboard. Once the record has been saved the indicator in the upper right hand of the window will display a green circle with a check mark.

Please note, if there are automations for the status that were removed, these automations will no longer work. In order for the automations to work, the automations must updated with a new status or removed.

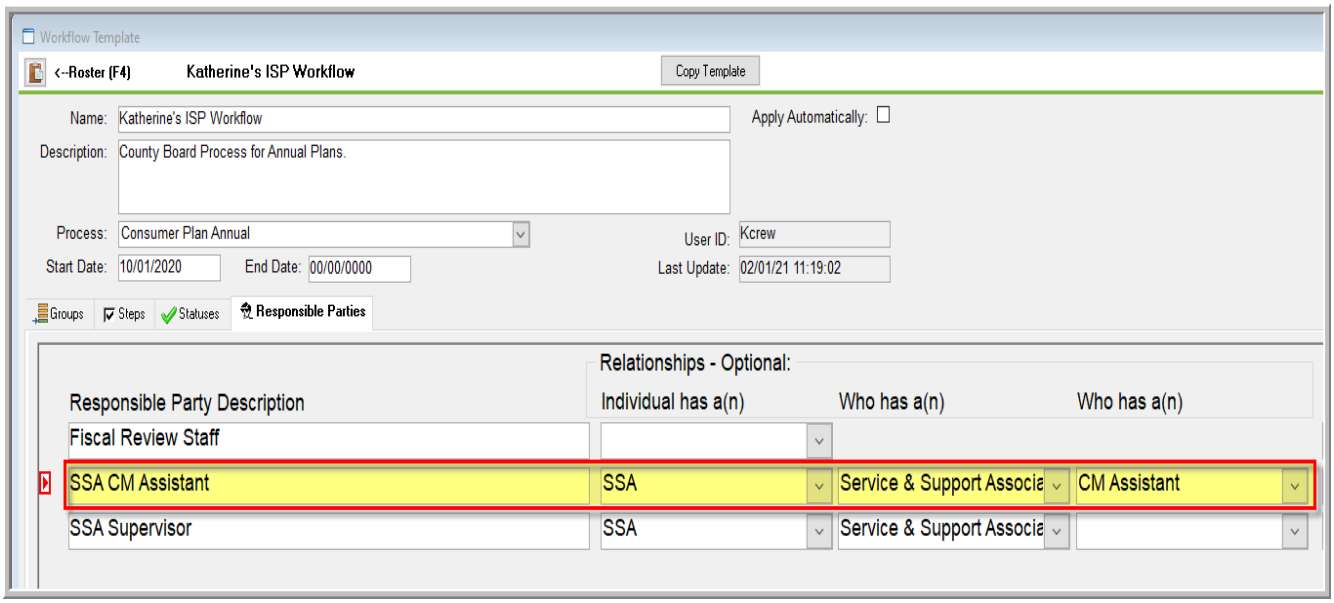
The Responsible Parties tab

This tab will allow administrators to define the responsible party types that are assigned to the workflow steps.

- Each responsible party type supports up to three defined relationships assigned on this tab.
  - If relationships are defined on this tab, this information can be linked directly to the assigned responsible party on the Steps tab. This will determine the chain of command for notifications within the workflow process.
  - **Assigning relationships is optional.**
- To insert a responsible party, select the green inset arrow in the toolbar or use “Control + I” on the keyboard.



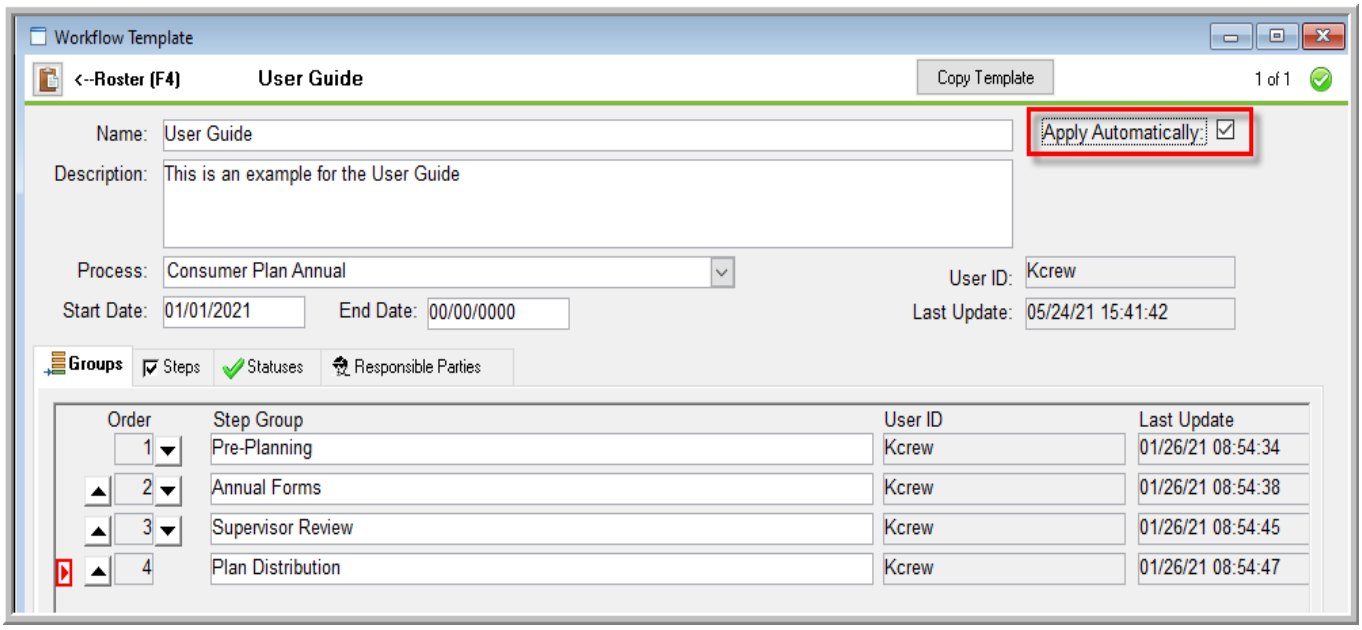
- Type the Responsible Party Description in the text field.
- Administrators can assign up to three relationships for each responsible party.
    - The first field will allow administrators to define the type of relationship the responsible party has with other team members. The relationship can be assigned by using the drop-down arrow to assign an existing classification that has been defined within Gatekeeper.
    - The second and third columns will allow administrators to define the next levels in the relationship.
- For example, The Responsible Party is the SSA Assistant. The SSA completes the plan. The SSA sends the plan to the supervisor for approval. Once approved, the supervisor forwards the approved plan to the SSA Assistant. The assistant is responsible for distributing the completed plan to all team members. The setup would look like this:



- Once all entries have been inserted, select the save icon in the toolbar or use "Control+ S" on the keyboard.

The Apply Automatically Option

When the Apply Automatically check box is checked, the new workflow will be applied to all new plans that are inserted in the Anywhere website.



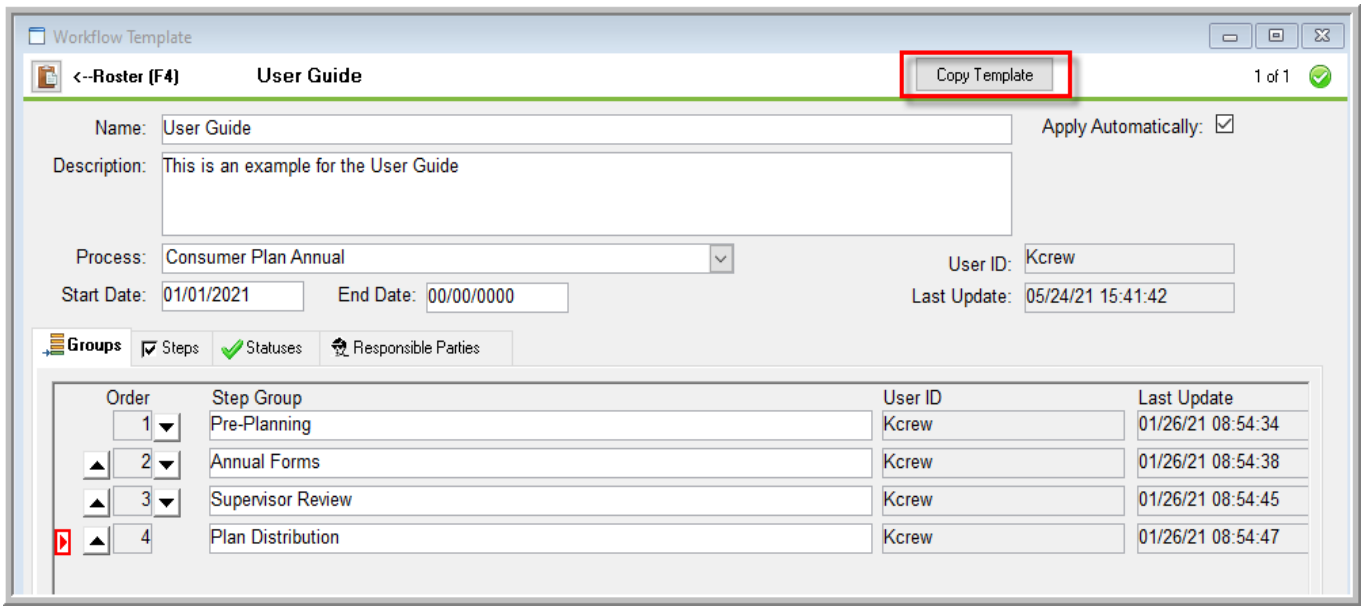
When a new workflow template is created and the apply automatically check box is checked, the workflow <u>will not</u> be applied to existing plans and the workflow cannot be manually added to existing plans. The new workflow will only be available to newly inserted annual or plan revisions.

- If the apply automatically check box is unchecked, the workflow template will appear in the plan window workflow options list and the template can be applied manually for the selected plan.
    - This will allow users to pick and choose the workflow templates that they want to apply to the plans.

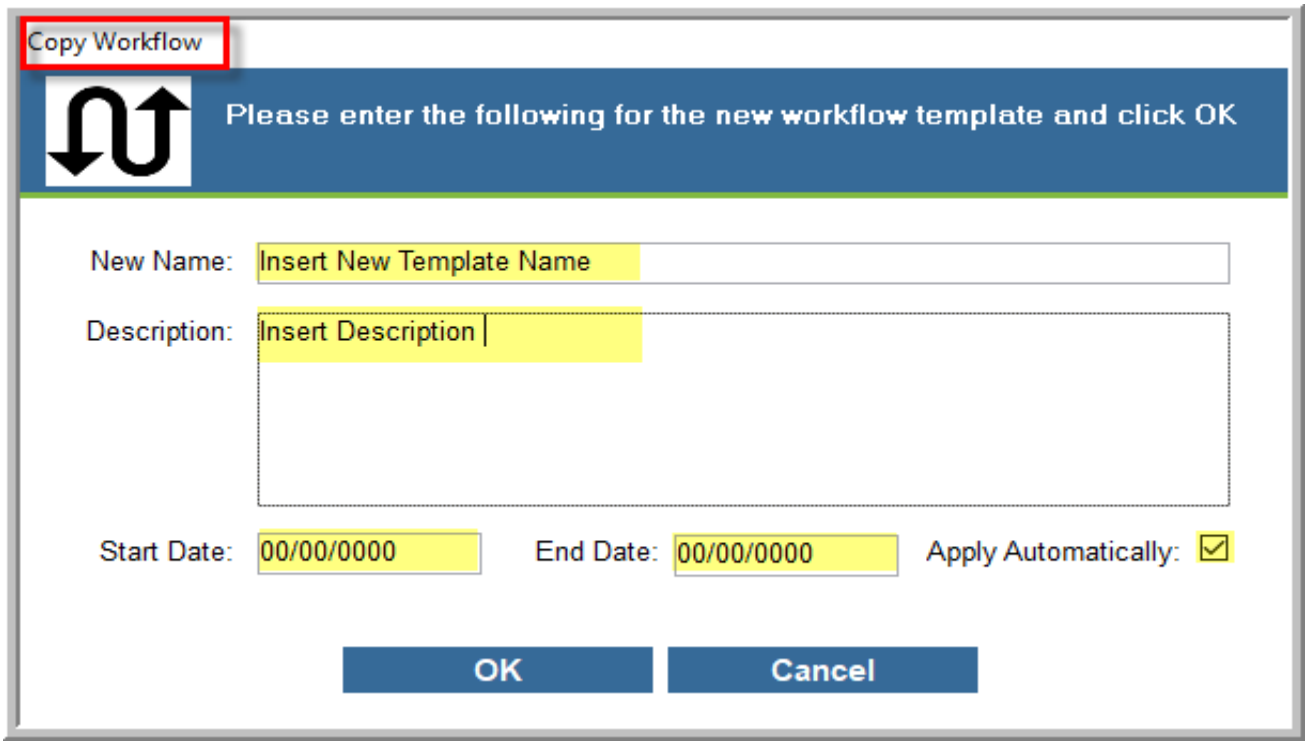
Copy Template option

This will allow administrators to copy an existing template and easily assign the workflow template to more than one plan type.

- When the Copy Template option is selected, a copy workflow window will display.



- Administrators will assign a new name, description, start and end dates to the new workflow template.
    - There is also an option to apply automatically.



- If the name, description, and dates are not revised, when OK is selected, a prompt message will display.
  - The message will state that the start date cannot be the same as the original template. The administrator will be prompted to insert a new name or new start date. Once the information is revised, a different prompt message will display.
- This message will prompt the administrator to end date the original template. The administrator must select yes or no.
- Once selected, the administrator will be given the option to view the new template. When yes is selected, the new workflow template will display in the window. Administrators can revise this template as needed to meet plan requirements.