

JOB AID

Modifying Workflow Preferences

User preferences allow each user to tailor the workflow preferences to their style of work including; how often the action list is refreshed, what fields are displayed, the types of email notifications received, and the frequency of the notifications. You can even elect to customize the functionality and display by color-coding the document status' so that you can easily see which documents need to be completed (saved) versus those that are being routed for approval (enroute).

WHO:

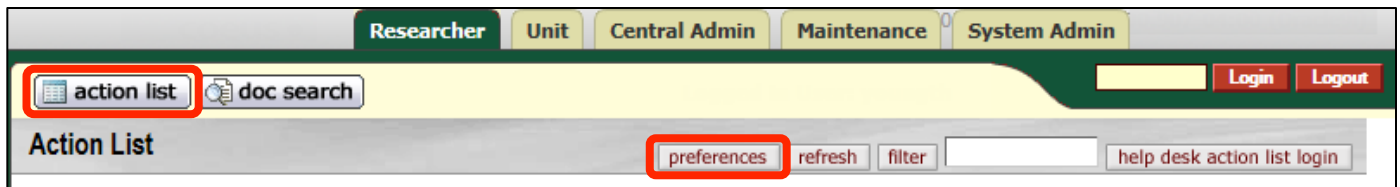
- All Users

WHEN:

- You wish to change your action list settings to best fit your work style

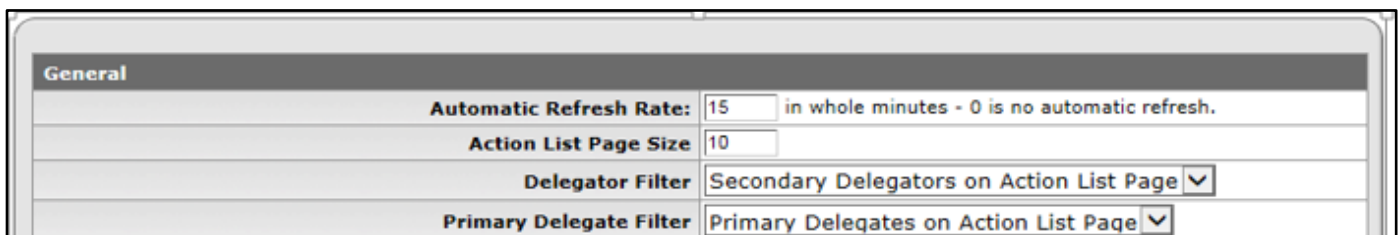
HOW:

1. Click the **Action List** button found within the header under any tab
2. Next, select the **preferences** button to bring up the **Workflow Preferences** view, where you are able to customize the display of your Action List



3. General Subpanel Options

- This subpanel contains the settings for the overall action list filter and allows the user to choose how often their list is updated, how many actions are displayed, and whether or not to view action items related to delegates



4. Fields Displayed in Action List Subpanel Options

- This subpanel contains options allowing the user to choose which information they want displayed in their action list

Fields Displayed In Action List	
Document Type	<input checked="" type="checkbox"/>
Title	<input checked="" type="checkbox"/>
ActionRequested	<input checked="" type="checkbox"/>
Initiator	<input type="checkbox"/>
Delegator	<input checked="" type="checkbox"/>
Date Created	<input checked="" type="checkbox"/>
Date Approved	<input type="checkbox"/>
Current Route Node(s)	<input type="checkbox"/>
WorkGroup Request	<input checked="" type="checkbox"/>
Document Route Status	<input checked="" type="checkbox"/>
Clear FYI	<input checked="" type="checkbox"/>
Use Outbox	<input checked="" type="checkbox"/>

5. Document Route Status Colors for Action list Entries Subpanel Options

- Allows the individual to select colors for each action request listed on the **Action List**, all items currently appear in the default color white

Document Route Status Colors for Actionlist Entries											
Saved	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Initiated	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Disapproved	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Enroute	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Approved	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Final	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Processed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Exception	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Canceled	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

6. Email Notification Preferences Subpanel Options

- This subpanel allows the user to set up when, what and the action requested of items in which they receive email notifications

Email Notification Preferences		
Receive Primary Delegate Emails	<input checked="" type="checkbox"/>	
Receive Secondary Delegate Emails	<input type="checkbox"/>	
Default Email Notification	Immediate ▾	
Document Type Notifications	Document Type	Notification Preference Actions
	<input type="text"/>	None ▾ <input type="button" value="add"/>
Send Email Notifications For	<input checked="" type="checkbox"/> Complete <input checked="" type="checkbox"/> Approve <input checked="" type="checkbox"/> Acknowledge <input checked="" type="checkbox"/> FYI	

7. Click **Save** at the bottom of the page to activate your selections

