

## Workflow Building Tips

Before getting started with building a Workflow, here are a few tips and recommendations to guide you along the way.

1. Document the business process for an ease of building the workflow.
2. Create the “Shared” inboxes based on departments, locations, or role specific (example: Accounting, Member Service, Loan Processing, Quality Review, Managers). (eSign menu: [Administration / Workflow Permissions / Inbox Management](#))
3. When creating the workflow, add the STEPS prior to adding STEP REPONSES. (eSign menu: [Administration / Workflow Builder](#))
4. Create and/or add users to their respective Active Directory Security Groups (not Distribution, nested or sub-groups). Ensure your employees are in their respective AD Security Groups (typically based on departments, branches and/or roles).

## Creating a Workflow

*Example workflow illustration for a Wire Transfer process*



(eSign menu: [Administration / Workflow Builder](#))

Drop-down list: [Create Workflow](#)

### GENERAL

Enter a Workflow Name (based on the business process, product or document set) Description – enter a description of the business process

### DOCUMENT SET

Select the applicable document that will utilize this workflow process. *Note: Document Sets will appear in this tab once the document is defined in the Admin Index Manager.*

### STEPS

Building a new workflow will begin with default steps (**Start, Download, Archive, Done**)

1. Add a Cancel step
  - a. Click the Add button
  - b. Step Name = Cancel
  - c. Step Type = Cancel
  - d. Save
2. Add an Archive Fail step
  - a. Click the Add button

- b. Step Name = Archive Fail
  - c. Step Type = Action
  - d. Save
3. Delete the Download step
  - a. Check the checkbox next to the Download Step Name
  - b. Click the Delete button
4. Edit the Start Step
  - a. Double click the Start step
  - b. Name the first STEP RESPONSE to Cancel
  - c. Set the NEXT STEP to Cancel
  - d. Save and Close
5. Add applicable STEPS with the Step Type = **Action** (follow your business process for the widget) Example Per the Illustration: Wire Process and Quality Review
6. Add a Widget Download Step
  - a. Click the Add button
  - b. Step Name = Widget Download
  - c. Step Type = Adhoc Download
  - d. Save
7. Edit the Widget Download Step
  - a. Name the first Step Response according to your business process.  
Example: Wire Process
  - b. Set the NEXT STEP to the applicable next step (Example: Wire Process)
  - c. Set the RECIPIENT to the applicable eSign inbox (Example: Wire Processors)
8. Edit the subsequent steps with the respective Step Response, Next Step and Recipient
  - a. Set Time based alerts accordingly
9. Edit the Archive step as follow  
Step Response = Archive  
Next Step = Done  
Step Response = Failed Next Step = Archive Fail Recipient= Archive Fail
10. Edit the Archive Fail step as follow  
Step Response = Resubmit to Archive Next Step = Archive Recipient= Archive
11. Save and Close from the Workflow Builder Steps tab
12. Publish the workflow
  - a. Select the radio button for the workflow
  - b. Select Publish Workflow from the dropdown
  - c. Enter comments detailing the changes performed
  - d. Click Save and OK