

AUTHORING & MANAGING WORKFLOWS

Workflows allow organizations to develop a structured learning environment geared toward your organizational objectives. The Custom Workflows module allows you to deploy and track online learning with simple enrollment, assignment, modification, and duplication.

[Workflows for Admins Overview](#) | Watch the video from our Help Center [here](#).


Who can author Workflows?

By default, admins are the users who can create and manage Workflows for their system. If your organization wants to permit specific users in the coach role the ability to create and manage Workflows for the users in their groups, the system admin can determine this on the 'System Settings' page of the Admin Management Panel.

To do so, scroll to the section that says 'ENABLE COACHES TO CREATE AND MANAGE WORKFLOWS.'

ENABLE COACHES TO
CREATE AND MANAGE
WORKFLOWS

Search for a User

Coaches			
Coaches that can create and manage Workflows.			
Name	Enabled by	Date Enabled	Actions
Elise Zavadak Coach	Elise Zavadak	01-22-20	

Search for the user you whom you want to enable this setting and click, 'Add.'

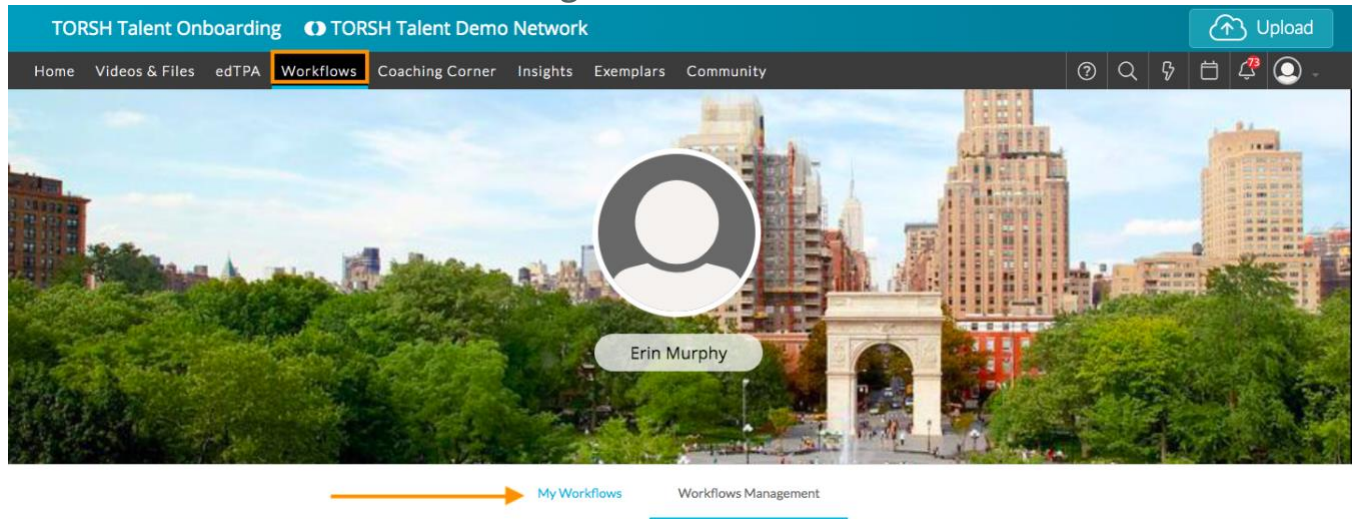
Are you sure? This will give Erin Murphy Coach the ability to create and manage Workflow.

Cancel

 Add

Workflows

When you click Workflows on the top navigation bar, you will see two tabs, 'My Workflows' and 'Workflows Management.'



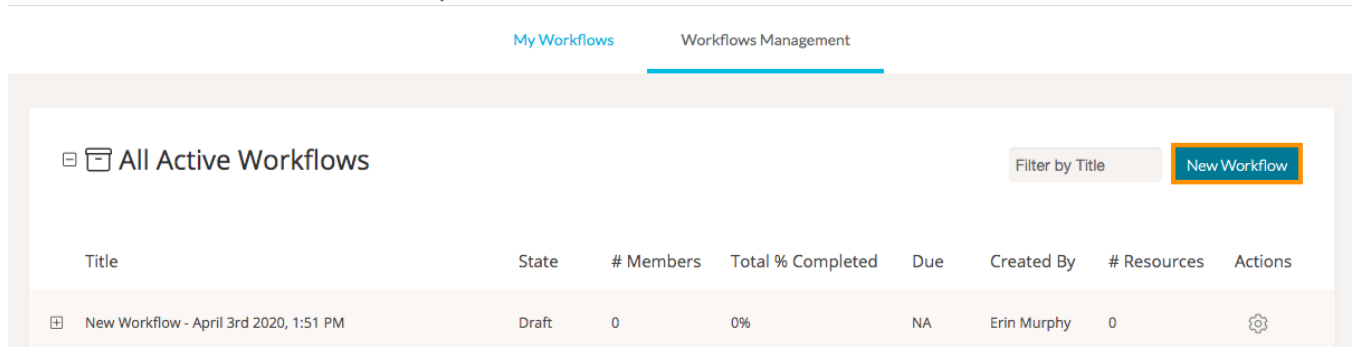
'My Workflows' is where you will see any Workflows in which you were invited to participate. Please note that if you are a participant in a Workflow, you will not have any management capabilities in that specific Workflow.

'Workflows Management' is where you will go to author and manage Workflows for your system.

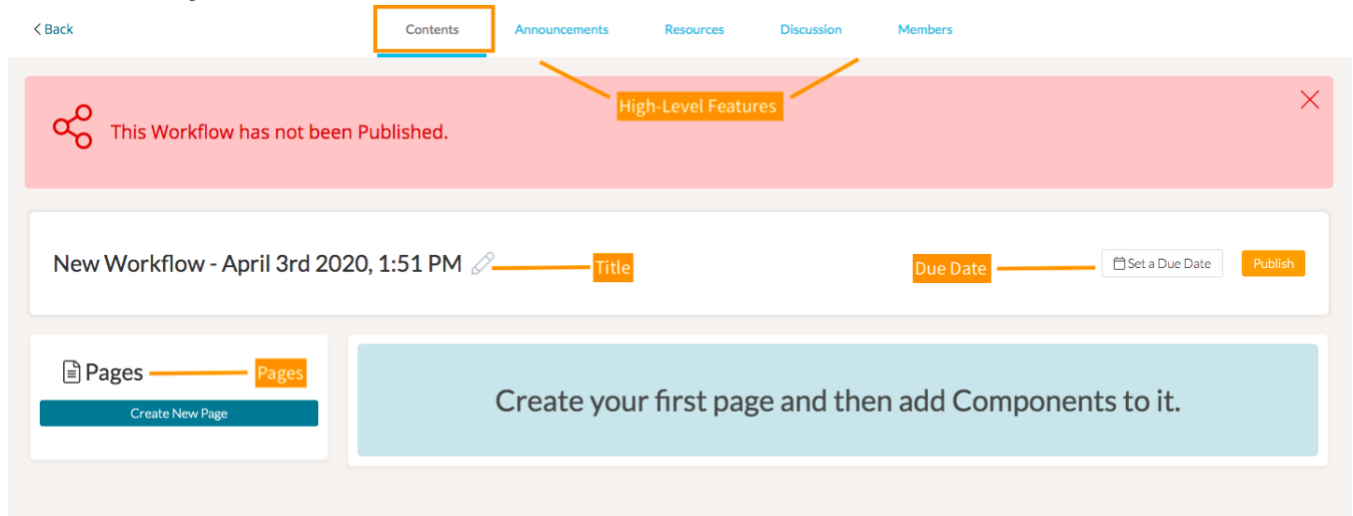
Authoring Workflows

If you are an admin or a coach with Workflow authoring capabilities, you can build and manage Workflows by selecting the 'Workflows Management' tab.

To create a new Workflow, select 'New Workflow.'



This will bring you to the high-level 'Contents' tab where you can begin to customize your Workflow.



Title and Due Date

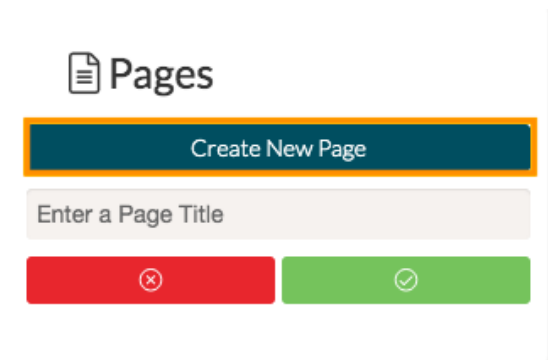
From here, you can give your Workflow a title and a due date.

New Workflow - March 23rd 2020, 1:53 PM

Pages

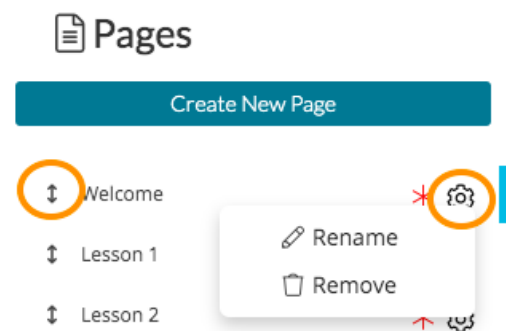
You can easily add content to your Workflow by creating a new page, then adding components to it.

To create a page, select 'Create New Page,' and give your page a title. Click the green checkmark to mark complete.




You can reorder your pages by dragging the arrows and dropping the pages to a new location on the list. If you want to rename or remove a page, you can do so by clicking on the gear icon.

You can choose to mark the page as required, which would require the participant to complete the page before moving onto the next part.



You can also set a due date for each page. The due date of an individual page must be before the overall Workflow due date.






Mark this page required 

Adding Components

To add content to a page, you can select from the following components:

- **Text Editor:** Use this component when you want to add a section of text to your page. This component includes many features you would find in your favorite word processing application. You can also embed images and links.
- **Resources:** Use this component to add supportive resources like videos, documents, and URLs. The resources you add here also aggregate to the top-level 'Resources' tab.
- **User Response:** Use this component when you want to request that a user submit a video, file, URL, or a written response. You can make user responses required.
- **View User Responses:** Use this component when you want to aggregate and display user responses for members to see.
- **Discussion:** Use this component when you would like to provide users with the ability to discuss the page.

Components

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You can change the title and sub-title of components to customize them to meet your needs and directives by clicking on the pencil icon when applicable.

Add Response  

Provide your response  

Add Video/File Add URL Typed Response Mark as Required

If you want to rearrange the components on your page, click on the arrows and drag and drop the component to the desired space.



You can delete a component from a page by clicking on the red trashcan.



Adding Members and Moderators

Before publishing your Workflow, you'll want to add members. To do so, click 'Members' from the top-level Workflow tabs.

Contents

Announcements


Resources

Discussion


Members

Here, you can add members and moderators to the Workflow.

- **Members** are participants and can be users of any role type (admin, coach, teacher). You can invite individual users or entire groups to join the Workflow.

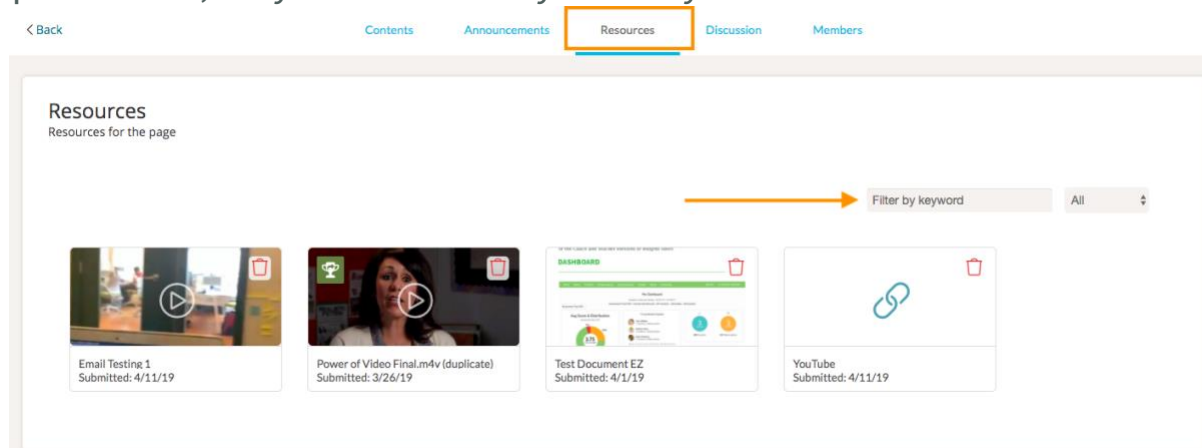
 Add Members

- **Moderators** can manage members, review/edit the Workflow, manage resources and announcements, view the discussion, and view members' responses. You can invite users in the coach role to be moderators. Moderators cannot author their own Workflows.

 Add Moderators

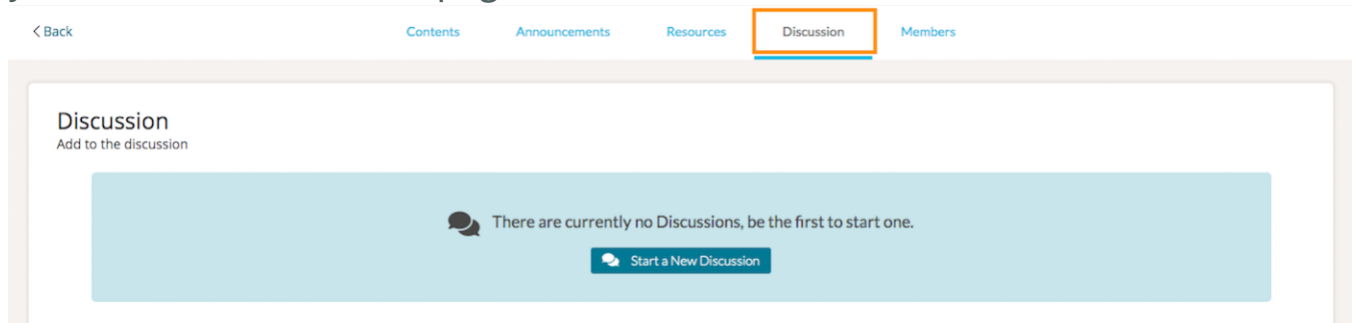
High-Level Resources

At the top of a Workflow, you will see the high level 'Resources' tab. If a user clicks this tab, they will see all of the resources from each page aggregated into one place. Here, they have the ability to easily filter and sort the resources.



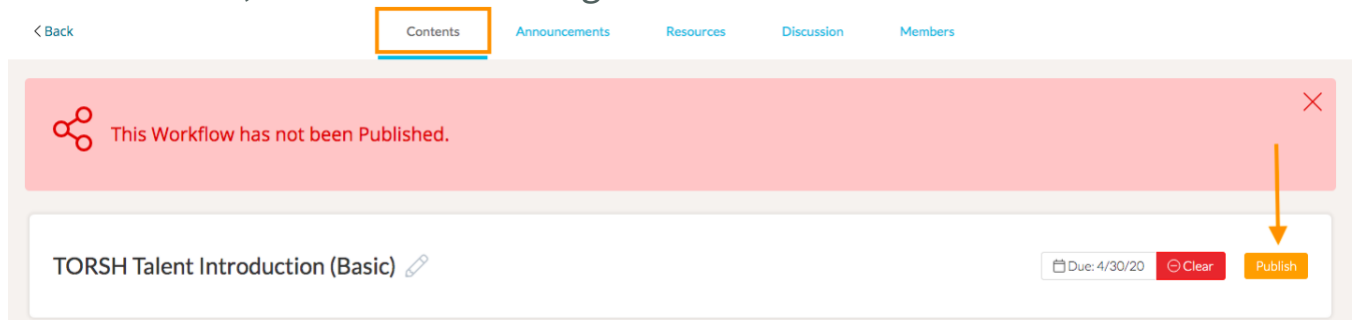
High-Level Discussion

At the high-level 'Discussion' tab, participants can have an overall discussion within the Workflow, which is separate from the 'Discussion' component that you can add to individual pages.



Publishing Workflows

When you're ready to invite members to a Workflow, head to the high-level 'Contents' tab, and select the orange 'Publish' button.




Once you publish the Workflow, members can start submitting their responses.

Managing Workflows

On the 'Workflows Management' tab, you will see lists of all of the 'Active,' 'Archived,' and 'Deleted Workflows' in your system. All admins and coaches with authoring privileges can see all of the Workflows in your system on these lists, no matter who created them.

In each list, you will see the Workflow title, state, number of members, due date, author, and number of resources. You can perform various actions on a Workflow by clicking on the gear icon in the 'Actions' column. You can filter the Workflows by title in the 'Filter by Title' box.

Title	State	# Members	Total % Completed	Due	Created By	# Resources	Actions
⊕ New Workflow - April 3rd 2020, 1:51 PM	Draft	0	0%	NA	Erin Murphy	0	
⊕ Module 1 - DBI	Published	12	0%	4/30/20	Elise Zava		
⊕ Quality Feedback Training	Published	1	100%	5/30/20	Erin Murp		
⊕ (OLD) SchoolWorks Classroom Observer Training (2018.19)	Published	1	0%	NA	Elise Zava		

Showing 1 to 4 of 45 records 4 Records per page First Previous 1 Next Last

- Manage Members
- Review/Edit Workflow
- Clone and Modify
- Manage Resources
- Manage Announcements
- View Discussion
- Preview Template
- Archive Workflow
- Delete Workflow

As an admin, you can perform the following actions: Manage Members, Review/Edit Workflow, Clone and Modify, Manage Resources, Manage Announcements, View Discussion, Preview Template, Archive Workflow, Delete Workflow.

If you are a coach with authoring, you cannot archive or delete a Workflow that was created by someone other than yourself. If you are a moderator, you cannot archive or delete any Workflows.

Clone and Modify









The clone and modify feature is a great way to use the same Workflow template for a different set of users. Just select ‘Clone and Modify,’ make any adjustments, and add members.

Announcements

If you want to add an announcement for Workflow members, click ‘Manage Announcements.’ Then, click ‘New Announcement.’ Give your announcement a title, add the content, then click ‘+ Add Announcement.’ This will notify the members of the Workflow.

New Announcement

Title

B I U   14      

|

Cancel + Add Announcement

Viewing User Responses and Completion Percentage

If you expand the details of a Workflow, you can view the individual members and their completion percentage. You can view their responses by clicking ‘View Responses.’

Name	% Completed	Date Completed	Actions
Elise Zavadak Teacher	0%	NA	View Responses
Erin Murphy Teacher	75%	NA	View Responses

You can also access this information from the top-level ‘Members’ tab within the Workflow.

Name	% Completed	Date Completed	Actions
Elise Zavadak Teacher	0%	NA	View Responses
Erin Murphy Teacher	50%	NA	View Responses Remove Member

Providing Feedback

When viewing a user’s responses, you can provide feedback by clicking on the ‘Provide Feedback’ button.

Video Sample

Provide your response



TORSH Testing.Conference Room.mp4
Submitted: 2/12/20

[Provide Feedback](#)