

PMWeb Visual Workflow

Workflow (System) Log Out

Roles Templates APM Rules

Select Template: -- Add Template --

Template Name: _____

Notes: _____

of days for original submitter to resubmit: 5

Allow returns to recalculate due dates.

Step	Roles	Any Can Approve	All Must Approve	Review Days	Can Edit Records	Notify on All Approvals	Notify on All Return	Notify on All Reject	Notify on All Withdrawal	Notify on Final Approval	CC
01	Product Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>	5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
02	Site Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>	5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Visual Workflow

```

    graph LR
      Submitter[Submitter] --> PM[Product Manager (Allan Long)]
      PM --> S1{Status}
      S1 -- Approve --> SM[Site Manager (Adrian Brown)]
      S1 -- Reject --> DR[Document Rejected]
      SM --> S2{Status}
      S2 -- Approve --> DA[Document Approved]
      S2 -- Reject --> DR
      DA --> WC[Workflow Completed]
      DR --> WC
  
```

Show First Name>Last Name

- Automated visual design
- Drag and Drop functionality
- Automatic email notification
- **Custom Form Builder**

Automated Process Management (APM)

- Establish **conditional** workflow for routing per defined business rules
- Unlimited user defined workflow rules
- **Limit of Authority**

Roles Templates Rules

Record Type: Budgets Do not use workflow for this record type.

Add Condition Delete Condition

Condition Name: Condition 2

And/Or	Field	Not	Operator	Value
<input type="checkbox"/>	Budget Total	<input type="checkbox"/>	>	50,000.00
<input type="checkbox"/>		<input type="checkbox"/>		
<input type="checkbox"/>		<input type="checkbox"/>		
<input type="checkbox"/>		<input type="checkbox"/>		
<input type="checkbox"/>		<input type="checkbox"/>		
<input type="checkbox"/>		<input type="checkbox"/>		
<input type="checkbox"/>		<input type="checkbox"/>		
<input type="checkbox"/>		<input type="checkbox"/>		
<input type="checkbox"/>		<input type="checkbox"/>		
<input type="checkbox"/>		<input type="checkbox"/>		

Test Conditions

Field	Value
Budget Total	111,000.00

Click to Test This Rule

Template Selected: PM,VP,Pres.

If the statement evaluates as true, use this template: PM,VP,Pres.