How-to Articles: Dashboard

Dashboard	Forms	Workflows
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Cancelling a Request

The **Cancel** function lets you cancel a request at any stage of the workflow process.

To cancel a request:

1. Locate the desired workflow in the Workflow Dashboard.

2. Select

   Cancel Request from the associated **Actions** menu.

   - A confirmation dialog displays the message "Are you sure you want to cancel selected record?"

3. Click the **OK** button on the confirmation dialog to complete the cancellation. (Click the **Cancel** button to retain the workflow in the Workflow Dashboard.)

   - A confirmation dialog displays the message "Item has been cancelled."

4. Click the **OK** button on the confirmation dialog to close the dialog.

   - The workflow *is not* forwarded to the next user.

Cancelling e-Signatures

For workflows with a pending e-signature, the **Edit and Cancel eSign** function lets you cancel the e-signature and forward the workflow to the next stage.

To cancel an e-signature:

1. Locate the desired workflow in the Workflow Dashboard.

2. Select

   
   Edit and Cancel eSign from the associated **Actions** menu.
   - A confirmation dialog displays the message "Are you sure you want to cancel sent documents for selected record?"

   Click the **OK** button on the confirmation dialog to complete the cancellation.
   - A confirmation dialog displays the message "Documents have been cancelled and you will be redirected to next stage."

3. Click the **OK** button on the confirmation dialog to close the dialog and return to the next stage of the workflow.

Cancelling a Signature

The **Cancel Signature** function lets you cancel an executed signature attached to a workflow.

To cancel a signature:

1. Locate the desired workflow in the Workflow Dashboard.

2. Select

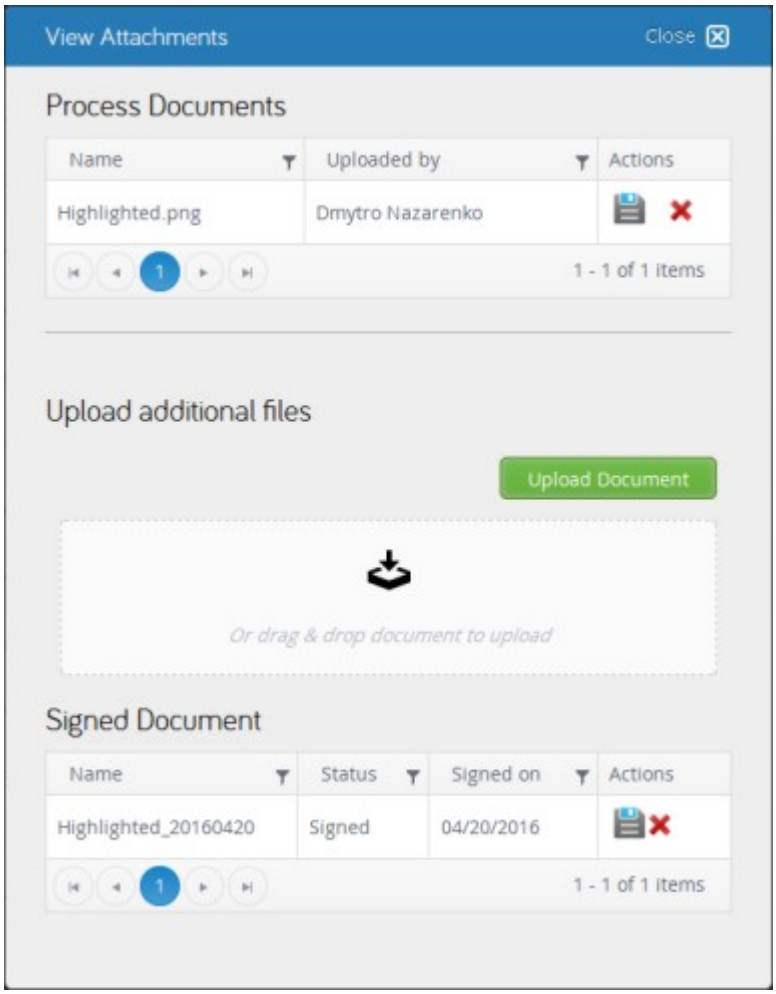
   
   Cancel Signature from the associated **Actions** menu.
   - A confirmation dialog displays the message "Are you sure you want to cancel sent documents for selected record?"

3. Click the **OK** button on the confirmation dialog to complete the cancellation. (Click the **Cancel** button to retain the signature in the workflow.)
   - A confirmation dialog displays the message "Documents have been cancelled."

4. Click the **OK** button on the confirmation dialog to close the dialog and return to the Workflow Dashboard.

Viewing Related Documents

The **Documents** function lets you view, download and delete attachments for with the associated workflow, and upload additional files to the workflow.



To view related documents:

1. Locate the desired workflow in the Workflow Dashboard.
2. Select

Documents from the associated **Actions** menu.

- The View Attachments dialog displays.

3. The View Attachments dialog consists of three sections:

   - **Process Documents** - Shows a list of all reference (unsigned) documents uploaded during the workflow or by using the **Upload Document** function.

   - **Upload additional files** - Provides a means of uploading *additional* documents to the workflow.

   - **Signed Document** - Shows a list of all signed documents uploaded during the workflow.

To navigate the document lists:

The **Process Documents** and **Signed Document** lists are multi-page lists, with 10 documents shown per page. The sequence numbers for the currently displayed documents and the total number of documents included in each list are shown in the lower right corner of the list. Controls for navigating the lists are shown in the lower left corner of the list. The page number for the currently displayed page is highlighted in blue.

To sort the document lists:

The **Process Documents** and **Signed Document** lists are initially sorted in alphanumeric order, by document **Name**. The

▼

or

▲

symbol is shown next to the column heading by which the list is sorted.

- The

  ▲

  icon indicates the list is sorted alphanumerically.

- The

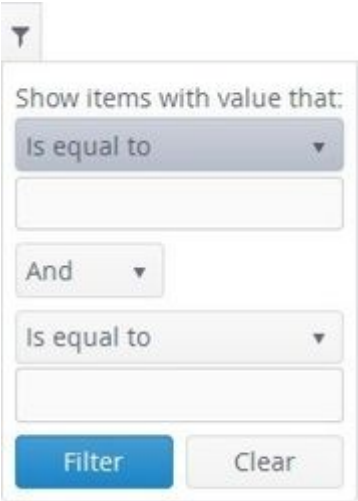
  ▼

  icon indicates the list is sorted in reverse alphanumerical order.

NOTE

The **Uploaded by** column is sorted by the user's *first name*.

- You can sort the lists using any column head as the sort key.



To filter the document lists:

The **Process Documents** and **Signed Document** lists initially show *all* documents associated with the workflow. You can limit the documents displayed in a list to a "subset" of documents by applying filters to *one or more* columns.

The Filters popup is displayed by clicking the

icon for the column by which you wish to filter the list. The Filters popup for the Workflows List is a "one term" filter. Using the Filters popup, you can enter the term for your filter and specify matching criteria (e.g., equal to, not equal to). Each filter is applied only to the contents of the associated column.

To download a document:

The

button in the **Actions** column of the **Process Documents** and **Signed Document** lists lets you download a copy of the associated document to a local workstation.

1. Locate the desired document in the **Process Documents or Signed Document** list.

2. Click the

   button in the **Actions** column for the desired document.

- A standard File Download dialog displays.

3. Select the "save" option from the File Download dialog.
   - A standard Save As dialog displays.

4. Navigate to the location in which you wish to save the document.

5. If desired, enter a new name for the document in the **File name** text box. *Be sure* to retain the file extension.

6. Click the **Save** button on the Save As dialog.

   - The document is downloaded to the selected location.

To delete a document:

The

button in the **Actions** column of the **Process Documents** and **Signed Document** lists lets you delete a document from the workflow.

1. Locate the desired document in the **Process Documents or Signed Document** list.

2. Click the

   button in the **Actions** column for the desired document.
   - A confirmation dialog displays the message "Are you sure you want to remove the file?"

3. Click the **OK** button on the confirmation dialog to complete the deletion. (Click the **Cancel** button to cancel the deletion and retain the document in the workflow.)
   - The confirmation dialog closes and the View Attachments dialog refreshes with the selected document removed from the list.

To upload additional files:

You can upload *additional* documents to the workflow from the View Attachments dialog. You can upload documents either by "drag and drop" or by using the **Upload Document** function.

- **To upload a file using "drag and drop:"**

1. Locate the document you wish to upload on your local workstation.

2. Make sure both the directory containing the file for upload *and* the TAP View Documents dialog are visible on the desktop.

3. Click and hold the left mouse button on the file you wish to upload, then "drag" the file to the **drag & drop document to upload** field on the View Documents dialog.
   - When the upload has completed, the uploaded file is shown at the top of the **Process Documents** list.

- **To upload a file using the Upload Document function:**

1. Click the **Upload Document** button.
   - A standard File Upload dialog displays.

2. Locate and select the document you wish to upload, then click the **Open** button on the File Upload dialog.
   - When the upload has completed, the uploaded file is shown at the top of the **Process Documents** list.

Removing a Workflow

The **Remove** function lets you remove (delete) a workflow from the Workflow Dashboard.

NOTE

Removed (deleted) workflows are moved to the Deleted Workflows List.

To remove a workflow from the Workflow Dashboard:

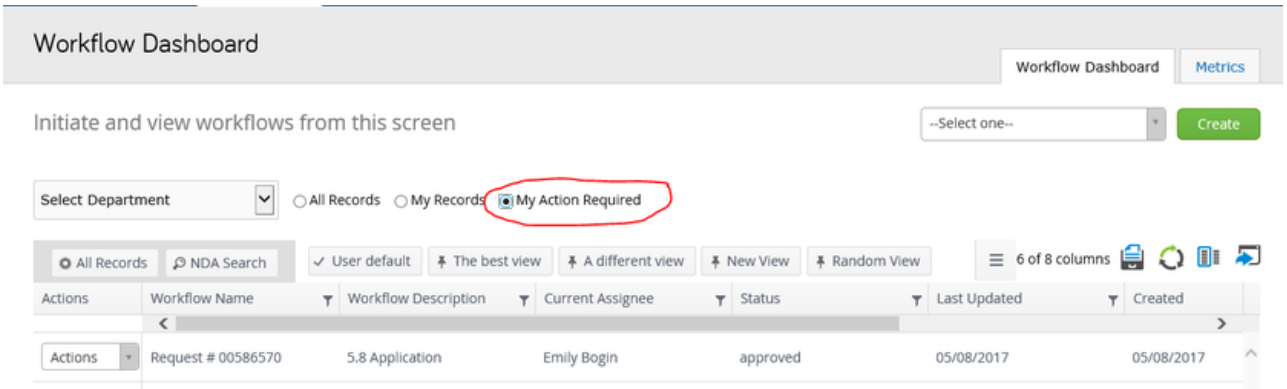
1. Locate the desired workflow in the Workflow Dashboard.
2. Select  **Remove** from the associated **Actions** menu.
   - A confirmation dialog displays the message "Are you sure you want to remove selected item?"
3. Click the **OK** button on the confirmation dialog to complete the deletion. (Click the **Cancel** button to cancel the deletion and retain the workflow in the Workflow Dashboard.)
   - The confirmation dialog closes and the Workflow Dashboard refreshes with the selected workflow removed from the list.

How do I know what is assigned to me?

When you open up the Workflow Dashboard, sometimes you want to just complete everything that has been assigned to you. How do you quickly and easily search for records that require your attention?

Find your actionables:

1. Open up the Workflow Dashboard.
2. Select the button that reads "My Action Required."
    a. After doing so, you will only be able to see workflows that require your action.
    b. That means that everything you see is currently assigned to you.
    c. Complete the requests by clicking the Actions dropdown and selecting "Edit Request."
    d. For more information on editing requests, please see related articles.



Related articles

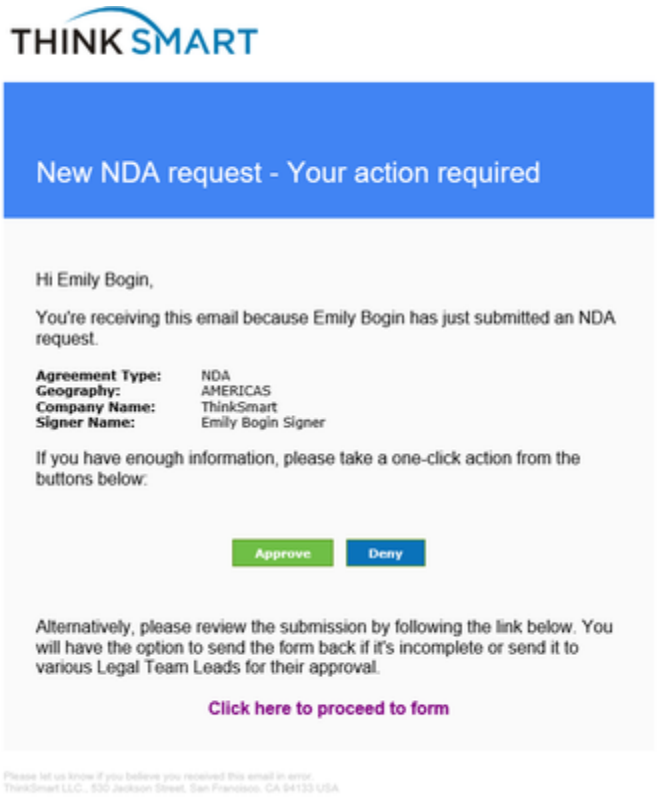
- General Information
- Reassigning a Workflow
- Editing Item Details

- Removing a Workflow

How do I access TAP from my email?

https://success.mitratech.com/TAP/UserManual/How-to_Articles/How_do_I_access_TAP_from_my_email%3F
Updated: Wed, 13 Mar 2019 20:31:48 GMT

Although you can "edit requests" from the TAP Dashboard, you can also edit those requests from the comfort of your inbox. The "current assignee" in a workflow will likely get an email notification, letting them know that it is his or her turn to fill out a webform. When that happens, you can go directly to the webform from your email.



Access TAP via email:

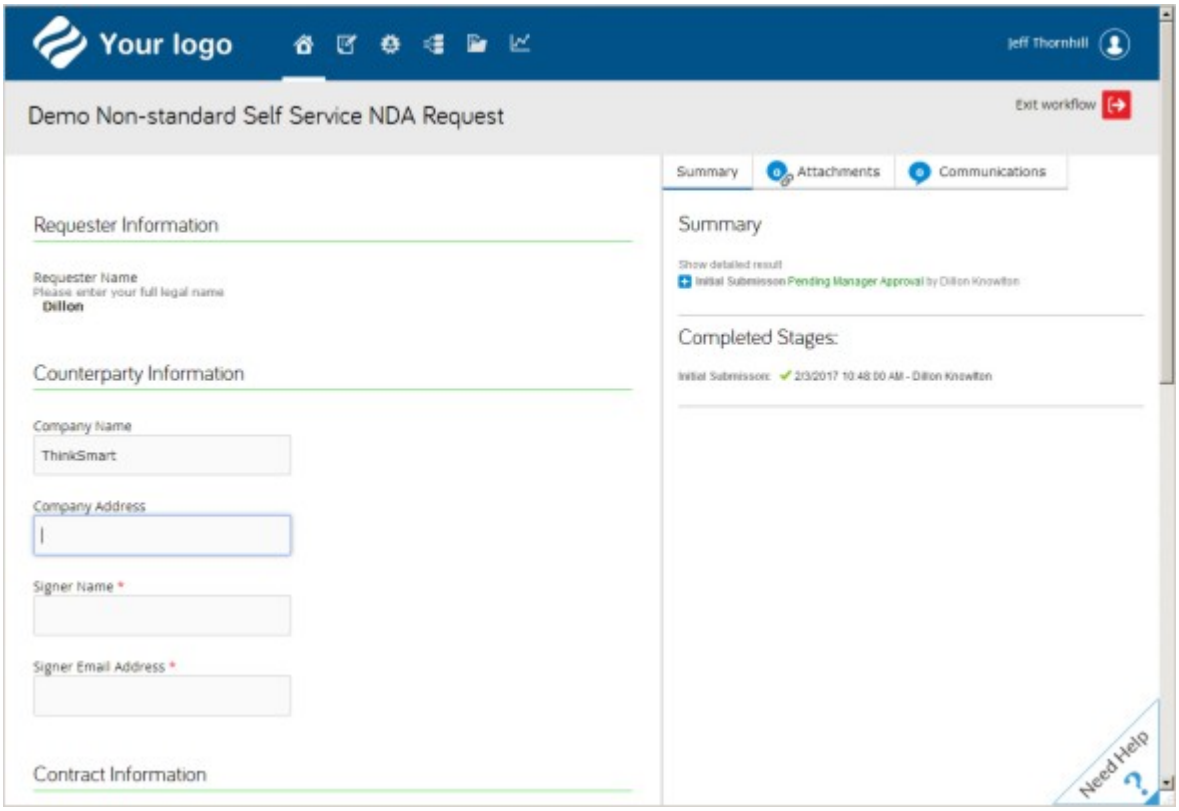
1. Check your email.
2. Open the notification that you received from TAP.
3. This notification is custom built for each participant in each workflow, so its look and feel can change.
4. Notice the buttons and links in the notification. Are there any buttons or links? If there are, you may be able to submit information into the form without leaving your inbox. You may also have a quick link back to the webform, if you'd prefer to look at the information within the TAP site.
5. These buttons and links allow you to take **Action** from the email. If you click approve, for example, you are approving what you see on your screen. You do not need to leave this email – your work is done. If you click "Proceed to form" or something that seems like a link back to TAP, when you click this link you will be redirected to TAP. From there, you can enter more information into your webform.

Related articles

- Editing Item Details
- How do I know what is assigned to me?

Editing a Request

The **Edit Request** function lets you complete and submit the current stage of a workflow, add comments to a workflow, upload *new* attachments to a workflow, and download, edit or delete *existing* attachments for a workflow. The Edit Request screen is a two-panel display. The left panel of the display shows the workflow form for the current stage of the workflow. The right panel of the display provides three tabs that show a **Summary** of workflow status, **Attachments** associated with the workflow, and any supplemental **Communications** added to the workflow.



To edit a request:

1. Locate the desired workflow in the [Workflow Dashboard](#).

2. Select

   Edit Request from the associated **Actions** menu.

- The Edit Item Details dialog displays.

3. Complete the form fields in the left pane of the Edit Request screen.
   - The currently active (selected) form field is highlighted in blue to aid in navigating lengthy or complex forms.
   - Use the <Tab> key to move from one field to the next.

4. When all necessary information has been entered, click the **Submit** button.

   - The Edit Request screen closes, and the workflow moves to the next stage.

     NOTE

     If you omit information from *one or more* required fields and submit the request, the cursor is automatically positioned in the *first* "blank" field, and the notation "*This field is required*" is shown below each required field. Enter the necessary information in *all* required fields, then click the **Submit** button.

To exit a request *without* submitting:

1. Click the

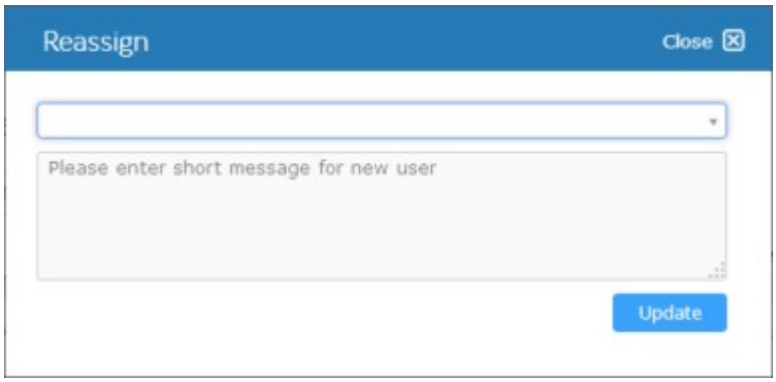
   

   Exit workflow button.
   - A confirmation dialog displays the message "Are you sure you want to exit workflow?"

2. Click the **Yes** button on the dialog to exit the workflow. (Click the **No** button to close the dialog and remain on the workflow).

Reassigning a Workflow

The **Reassign** function lets you reassign a workflow to another user. When reassignment is completed, *the original* workflow notification is forwarded to the new assignee.



To reassign a workflow:

1. Locate the desired workflow in the Workflow Dashboard.

2. Select

   Reassign from the associated **Actions** menu.
   - The Reassign dialog displays.

3. Located the user to which you wish to reassign the workflow.
   - Enter the name of the user in the *top* text box.
     - This field is *mandatory*.
     - You must enter *at least three* characters of the desired user's name.
     - The system reads your search term as a string of characters (rather than a whole word) and locates *only* those names containing the specified term *anywhere* in the name.
   - A drop-down menu displays as you type, showing all user names that match the entered search term.

4. Click the name of the user to which you wish to reassign the workflow.
   - The user's name and email address are automatically entered in the top text box.

5. Enter any instructions or notes to the user in the **Please enter short message for new user** text box.
    - This field is *optional*. Content entered in this field is appended to the original workflow notification.

6. When all necessary information has been entered, click the **Update** button to close the Reassign dialog and reassign the workflow to the specified user.

    NOTE

    If you *do not* specify a user to whom the workflow will be reassigned, an advisory dialog displays the message "Error processing request" when you select the update button. Click the **OK** button on the advisory dialog to close the dialog, then perform steps **3** and **4** to select the desired user.