

Workflow Edit/Manage Workflow

Users with appropriate permissions can Edit and Manage the Workflow for an item that is In Review or in Approval. To Edit and Manage the Workflow, select the Actions Menu associated with an Item that is In Review or Approval and select **Manage Workflow**.

To add a Recipient for Review, Select +Add Recipient, enter the Recipient's username into the Select a Recipient field, and select a Signature Reason from the Select signature reason field dropdown arrow. Selecting OK will add the Recipient to the Approver List below.

Note: You can't add more than the Maximum number of Recipients for that Workflow Task.

To Delete or Reassign an Approver from the item, Select that user in the Approver List and select Delete or Reassign. Selecting Reassign will add that user's data into the Review fields so that you can change them. Selecting Delete will remove the user from the list.

Note: Tasks Recipients who have completed their step in the Workflow cannot be Deleted or Reassigned.

Note: It is not possible to Delete a Recipient that would take the number of Recipients below the minimum number of Recipients for that Workflow Task.

If the Workflow has multiple steps in the Review or Approval process, the step that you are viewing in the window can be changed by selecting another task on the left side of the window.

When the appropriate changes have been made to the Workflow, select **Save** to save the changes. The Manage Workflow window will automatically close.

To exit the Manage Workflow window without saving any changes, select **Cancel**. The Manage Workflow window will automatically close.

Canceling the Workflow

To Cancel the Workflow, select **Cancel Workflow** in the bottom left corner of the Manage Workflow window. A warning message will display asking if you are sure that you wish to Cancel the Workflow. Clicking Ok on the warning message will Cancel the Workflow and the Document will return to Draft status.