CAPITAL PLANNING & PROJECT MANAGEMENT
TRAINING GUIDE

WORKFLOW APPROVER
CPPM WORKFLOW APPROVER

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AiM Workflow Approval Process

1. Receive notification that an AiM Workflow requires your approval
2. Review the AiM transaction record, related documents, and notes log
3. If a form or contract requires your signature:
   a. Download the Form from the Workflow screen
   b. Review and sign the Form
   c. Scan the signed Form
   d. Upload the signed Form as a Related Document
4. Add any applicable notes to the Workflow record
5. Select your Workflow Response – approve or return for revisions

HOW TO ACCESS AN AIM WORKFLOW

1. You will receive a notification on your AiM WorkDesk and an email notification when a Workflow requires your attention
2. Click on the WorkDesk or email link to view the Workflow

EMAIL:

Hello,

A new capital project consultant contract has been initiated and requires your review. Please click the link found at the bottom of this email to access the contract record. After reviewing the contract, please indicate on the Workflow whether you approve the contract or would like to return it to the Project Manager for revisions. If the contract requires your signature, please download the attached contract, sign it, and then attach the signed contract to the AIM contract record prior to responding to the workflow.

Thank you,

Physical Plant, College of Charleston

https://muse.battery.cofc.edu:8443/login/screen/CONSULTING_CONTRACT_WORKFLOW_RESPONSE_VIEW?recordId=1400&fromName=1405&flag=1
HOW TO REVIEW AN AIM WORKFLOW

1. Review the Transaction record

   a. From the Workflow screen, click on the Transaction Number to view the Transaction Record
b. Review the main screen of the Record. The underlined, blue fields serve as links to other related records in AiM (for example, on the screen below you could click on the Capital Project Number to access the Capital Project record).

c. The underlined, blue items on the ‘View’ menu contain additional information pertaining to the record.
d. Click on the Line Item Number to access the Line Item screen

e. To view other records associated with the record you are reviewing, select ‘ViewFinder’ from the ‘Action’ menu
f. The ViewFinder screen displays related record types under the ‘Screens’ menu. Click on the record’s Transaction Number to view the record.

g. Toggle the ‘Screens’ menu from ‘Transactions’ to ‘Documents’ to see all Documents related to the record.
h. To return to the Workflow, click the AiM ‘Back’ button until you reach the Workflow screen. Do not click the Browser ‘Back’ button.

2. Review and download the Related Documents by clicking on the Document Thumbnails
3. If you would like to download all Related Documents in a Zip Folder, select ‘Download’ from the ‘Action’ menu

4. Review the ‘Notes Log’
   
   a. Select ‘Notes Log’ from the ‘View’ menu

   b. Click on the ‘Entry Date’ to view a Note
c. Click ‘Done’ to return to the Workflow screen

HOW TO ATTACH DOCUMENTS

1. From the Transaction record, select ‘Related Documents’ from the ‘View’ menu
2. Click ‘Edit’

3. Click ‘Add’

4. Choose the document file name, then click ‘Next’
5. Make sure the Document Title meets document naming standards. Select the Document Type. Click ‘Next’ until you return to the ‘Related Documents’ screen.

6. SAVE
HOW TO ADD NOTES

1. From the Workflow screen, click ‘Notes Log’

2. Click ‘Add’ to add a new note
3. Type the note into the note field. Select the appropriate Note Type.

4. SAVE and then click ‘Done’ on the next screen
HOW TO RESPOND TO AN AIM WORKFLOW

1. Click ‘Edit’ on the Workflow Response screen

2. Select the appropriate response from the ‘Response’ drop down menu
   
a. **Approved** – the Workflow will advance to the next status and approver
   
b. **Approved with Notes** – the Workflow will advance and signal to other users to check the Notes Log
   
c. **Revisions Required** – the Workflow will return to the Project Manager for revisions. A note should be logged describing why revisions are required.
3. SAVE