

How to...

Configure reminders and escalate a workflow using delegation

Method 1

The screenshot below shows the set of actions required to enable a timed escalation process. To summarize, the workflow will wait for a calculated duration (incorporating a number of reminders) before delegating the Approval task to another user.







The first thing to do is to create a variable of type "Action ID". Every "Request approval" action will generate a specific ID number which can be used to make reference to it. The variable we create will store the "Request Approval" action's unique ID.

Please note: you would need a variable for each "Request approval" action in the workflow for which you wanted to apply reminders and/or delegation.

Workflow variables	
- 🛛 🕜	
Save Cancel Help	
Commit Help	
Name	Approval Action ID
	Approval Action 1D
Type	Single line of text Person or Group
	🔘 Multiple lines of text 🔘 Integer
	Choice List Item ID
	Number
	💿 Date and Time 🛛 💿 Collection
	O Yes/No
Show on start form	

You can then add a "Request Approval" action to the workflow, add an approver or approvers then choose to store the Workflow Action's unique ID in the variable we created earlier.

General		
Save Cancel Action Task	Not Required Edit Task Labels Common Variables Help	
Commit	n Notification Form *	
Commit	actinga timonta rinip	
Approvers *	Test User ;	
	Create individual tasks for all group members	
Allow delegation		
Allow LazyApproval	(only applicable with email delivery)	
Task description	Insert Reference 🖑	
Approval options	All must approve O First response applies	
Approval options	All must approve Only one approval is required Ovte	
Approval options Task name	All must approve Only one approval is required Vote	
Approval options Task name Task content type	All must approve Only one approval is required Vote Mintex Workflow Task	
Approval options Task name Task content type Priority	All must approve Only one approval is required Vote Nintex Workflow Task (2) Normal	
Approval options Task name Task content type Priority Form type	All must approve Orly one approval is required Vote Nintex Workflow Task (2) Normal Default J	



You can then drag a "Task Reminder" action onto the right branch of the workflow and configure it. From the Action ID drop-down, select the Action ID variable that corresponds with the "Request Approval" action for which you wish to apply the reminders. In this case, there is only one such action and variable, so the selection is easy. You can then set the number of reminders and the interval between them.

Configure action - Task remin	ıder			
Save Cancel Commit Settings	Variables Help			
Action ID *	Approval Action ID	•		
Number of reminders *	2		B	
Time to reminder *	Days: 1 22 22 22 22 22 22 22 22 22 22 22 22 2			
Time calculation	During business days only During business hours only			
сс		12		
From			<u> </u>	
Subject *	REMINDER: Please review	ដ្ឋា		
Attach file				
Rich Text 🗶			Insert Reference 🖉	
Dear <u>Approver Name</u> ,				
Please Review the following:				
<u>ltem Url</u>				
Delivery type *	🕲 Email 💮 IM 💮 User preference			



If the "Request approval" action is completed in the time-frame set by the number of reminders and intervals, the workflow will continue out of the branched actions. If not, it will advance down the right branch to the "Delegate Workflow Task" action. Configure the delegation ensuring that you use the associated Action ID variable. You can then choose a user to whom to delegate the workflow task and insert whatever text and dynamically looked up information you require. The workflow will wait until the delegated workflow task has been completed before continuing with the rest of the workflow.

Configure action - Delegate workflow task			
General		_	
Save Cancel	Common Variables Help		
Comme Settings	ranaeco rep		
Action ID *	1		
Delegate after	Days: 0 III Hours: 0 III Mins: 0 III		
Time calculation	 During business days only During business hours only 		
Delegate to *	Test User ;		
Comments	Automatically delegated due to no response.		
Apply to	 All pending tasks First pending task (other pending tasks will be not required) 		



Method 2

Simply use a "Flexi task" action. The "Flexi task" action is a highly versatile, self-contained action that is similar to the "Request approval" action in that it allows you to request the approval of numerous users. It also allows you to create alternative outcomes without being bound to only "Approve" or "Reject".

The "Flexi task" action has reminders, delegation and escalation built in. Drag a "Flexi task" action onto the design canvas, open the action's configuration dialog and check the "Delegation" box.

Configure action -	Assign Flexi task	□ ×
General		
Save Cancel Action	Task Not Required Reminders Escalation Edit Task Labels Common Notification Settings Variables Help	
Assignees *	Reader T. Reader ; Image: Create individual tasks for all group members	<u> </u>
Allow delegation		
Allow LazyApproval	(only applicable with email delivery)	
Task description	Insert Reference 🖉	
		н
Outcomes	Approve X Reject X Add outcome	
Behaviour	 First response applies Majority decides Majority must choose a specific outcome All must agree All must agree on a specific outcome 	





Nintex Workflow 2010

To configure reminders, click the "Reminders" button in the action's ribbon. There you can set the number of reminders you wish to be issued and the time between each one. It also allows you to customize the Reminder message that the users receive.

Configure action	- Assign Flexi task	□ ×
General		_
Save Cancel Action	Task Not Required Reminders Escalation Edit Task Labels Common Variables Help	
Commit	Settings Variables Help	
Number of reminders	0	
Time between reminders	Days: 0 Image: Comparison of	
Time calculation	During business days only During business hours only	
сс		
From		
Importance	Normal 💌	
Subject	(j)	E
Attach file		
Rich Text 💌	Insert Reference «	, 7

Similarly, click the "Escalation" button in the ribbon. You can choose to delegate the workflow task to another user or to complete the task.

Configure ad	tion - Assign F	exi task						
Save Cancel	Action Task Notification	Not Required R Notification	eminders	Edit Task Form ↓	Labels Commo	n Variables	? Help	
Commit			Settings			Variables	Help	
Escalation type		None None Delegate task Complete task	: k			-		