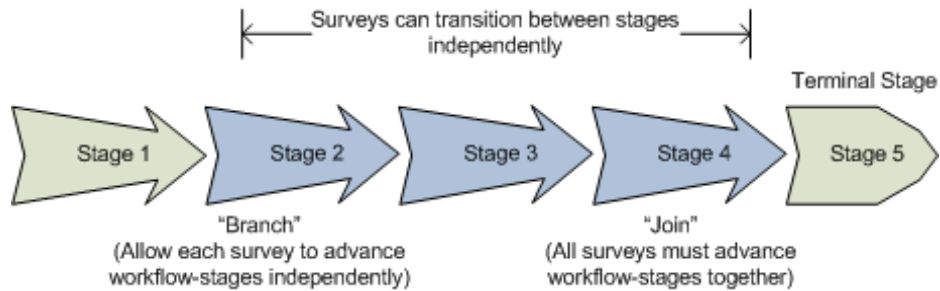


## Creating Workflows With Branching

Workflow stages have actions that transition questionnaires to different workflow stages. Typically, questionnaires advance through stages 1, 2, 3, and so on, but returning to previous stages is common. Review or Approval stages, for example, might include a 'Reject' action that reverts to an earlier workflow stage.

When you create a custom workflow template, specify the number of stages you would like and end with a Terminal stage. Each stage includes notification and other options. While planning your workflow template, decide which stages will allow questionnaires to advance independently and which will not. In a five-stage workflow, for example, you might allow independent movement in stages 2 through 4. To specify this, set stage 2 to "branch" and stage "4" to "join" by selecting the "Allow each questionnaire to advance workflow-stages independently" option in stage 2 and selecting the "All questionnaires must advance workflow-stages together" option in stage 4.



There are a few rules:

1. Every "branch" stage ("Allow each questionnaire to advance workflow-stages independently") must have a matching "join" stage ("All questionnaires must advance workflow stages together") later in the workflow.

2. A workflow can have more than one branch-join pair, but they cannot overlap.

**1 - 2 (branch) - 3 - 4 (join) - 5 - 6 (branch) - 7 - 8 (join) - 9 (terminal) <OK**

**1 - 2 (branch) - 3 - 4 (branch) <<No, need to join the first branch before starting second branch**

**1 - 2 (branch) - 3 - 4 (terminal) <<No, need to join the branch before the terminal stage**

3. A "branch" stage ("Allow each questionnaire to advance workflow-stages independently") can have actions that transition to stages before the branch stage, but no questionnaire will be able to advance past the "join" stage until all questionnaires have reached the "join" stage.

4. Stages after a "join" stage ("All questionnaires must advance workflow-stages together") cannot have actions that transition to stages before the "join" stage.

### Options

- Remind Stakeholder  days after start date; use Email Template:  Preview
- Escalate to program owner  days after start date; use Email Template:  Preview
- Escalate to stakeholder's manager  days after start date; use Email Template:  Preview

**Create a "Branch" stage**

- Remind Stakeholder  days after start date; use Email Template:  Preview
  - Escalate to program owner  days after start date; use Email Template:  Preview
  - Escalate to stakeholder's manager  days after start date; use Email Template:  Preview
- Allow each questionnaire to advance workflow-stages independently
- All questionnaires must advance workflow-stages together

### Options

- Remind Stakeholder  days after start date; use Email Template:  Preview
- Escalate to program owner  days after start date; use Email Template:  Preview
- Escalate to stakeholder's manager  days after start date; use Email Template:  Preview

**Create a "Join" stage**

- Remind Stakeholder  days after start date; use Email Template:  Preview
  - Escalate to program owner  days after start date; use Email Template:  Preview
  - Escalate to stakeholder's manager  days after start date; use Email Template:  Preview
- Allow each questionnaire to advance workflow-stages independently
- All questionnaires must advance workflow-stages together