Workflow Search

A workflow is a method of reviewing a chemical for use at your company. This document explains how to find a workflow form using the workflow search or the MSDS search features.
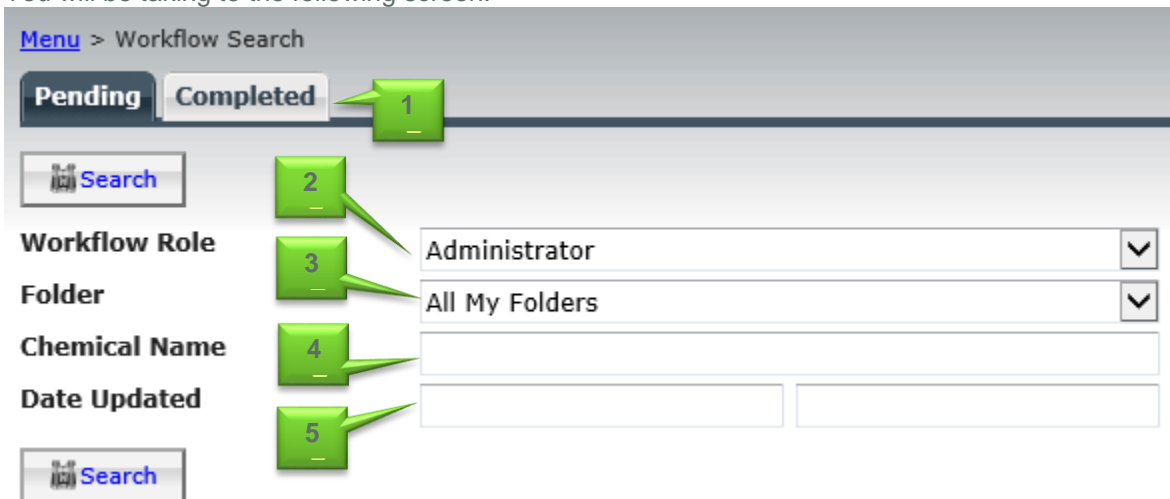
Using the Workflow Search Page

To begin a workflow search click on the **Workflow Search** button on the main menu.

You will be taking to the following screen:

1. At the top of the screen are two tabs, **Pending** and **Completed**.
   a. **Pending** will search for workflow forms that have not been completely approved or rejected.
   b. **Completed** will search for workflow forms that have been approved for use or rejected.

2. You can search by **Workflow Roles** on the **Pending** tab. Searching by **Workflow Roles** will return those workflow forms waiting to be reviewed by the selected workflow role. The drop down will default to your primary workflow role.
   a. Example: If you are a Safety Reviewer, you can set the **Workflow Role** to *Safety Reviewer* and see all the workflow roles awaiting a Safety Reviewer's evaluation.
   b. Some users have access to and *Administrator* role that will allow that user to search across all workflow roles.

3. The **Folder** drop down allows you to search for review states.
   a. The default setting of *All My Folders* searches for workflow forms awaiting the set **Workflow Role**'s review.
   b. *All Folders* will display all workflow forms you have access to.
   c. The **Folder** drop down allows you to select a specific reviewer's folder to view. For example if you want to view everything in Safety Review you can select Safety in the folder drop down.

4. If you are looking for a specific workflow form that you know has been entered into the system, enter the product name in the **Workflow Form** field**.**
   a. **NOTE:** You may need to set the **Folder** to *All Folders* in order to find the workflow form you are looking for.

5. If you want to search for workflow forms submitted between certain dates, you can enter those dates in the **Date Updated** field.
   a. **NOTE:** You may need to set the **Folder** to *All Folders* in order to find the workflow form you are looking for.

When you have completed setting up your search parameters, click the **Search** button.
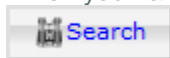
Search Results

The following picture shows an example of a workflow form search results.

1. The **Workflow Form** shows the name of the workflow form that has been submitted. You can click on any chemical listed in the **Workflow Form** to open the workflow to read the workflow or to assess and approve or reject the chemical.

2. The **Folder** shows what **Workflow Role** the workflow form is awaiting review from.

3. The **Date Updated** shows the day the workflow form was last updated by a user.

Clicking on any of the Headers **Workflow Form, Folder,** or **Date Updated** will change the order in which the results are displayed.

Find the Workflow Form from the MSDS Record

A link to the workflow form is also available on the MSDS Detail page.

1. On the Admin Main Menu, click **MSDS Search**.

   MSDS Search
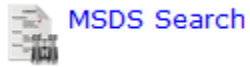
2. Search for the MSDS.

Product Name	acetone
Manufacturer	
MSDS Number	
Facility	▼

3. On the search results screen, click the MSDS.

MSDS	Product Name ↑ 1	Manufacturer	Revision Date	MSDS Number
☐ 📄	Acetone	VWR International	10/24/2012	MSDS-000588
☐ 📄	Acetone	Ashland (Valvoline)	10/8/2013	MSDS-001568

4. On the MSDS details page, scroll down to All Workflow Forms. You can click on the link there to view the workflow form.

   All Workflow Forms

   📊 Export to Excel

Product Name	Folder	Date Created	Date Updated
Acetone	Approved	7/14/2012 6:45:00 AM	7/27/2012 11:29:05 AM