Process Builder

A process is a new file type in Workiva. Create a process will create a file in our file system and launches our process builder experience. Here, I have a process that has already been built out. I did that by adding actions or steps to my process here. Right now, we have two types of actions that you can add to your process. Each are designed with specific use cases in mind.

The first one is a simple task to delegate work to someone. These tasks are generally useful for processes that are checklist based like a month end close process, for example.

The other is a content request, which essentially is the same thing, except that it will automatically handle permissions for you as part of the task workflow. This type of task is useful for data collection processes where you might have more rigid controls around access throughout the editing and review process.

In this process that I have built out, all of the tasks here are content requests. You'll notice here, that I must have owner access to the files that I want to select. And that's because the process will be automatically granting permissions on the selected file.

Today, I'm going to show you how this process that I built out will facilitate the collection of data in a spreadsheet. This sheet here is a consolidation of these locations. Each sub sheet here looks the same, and I collect information on each sheet from different colleagues of mine. One thing I would like to point out here is that you can see that I'm using our new CHILDREFS formula. This is aggregating greenhouse emissions located on cell B13 from all of the children sheets and my outline. Previously this formula would have looked like this crust sheet formula. And if I added a new section to my outline, I would have to remember to update my formula to include that new section. Now with the CHILDREFS formula, if I add a new section that will automatically be included in my SUM formula.

Another feature that has been added to spreadsheets to streamline data entry is the ability to designate input cells. When you apply input cells, that will shade the cells blue as a way to highlight where data providers should input their data. Also, when you enable input mode on the spreadsheet. This means that your data providers will only be able to edit the input cells. They won't be able to make any other edits or formatting changes to the sheet. This gives process owners more control over their spreadsheets and simplifies the experience for data providers.

Using processes I'm going to direct my data providers to the appropriate sheet to input their data and have processes automatically manage the permissions. Before we start, let's take a look at permissions.

This is our advanced permission editor. Here you can see that I'm the only person listed as having access to this document and all of the sections within the document. We'll come back to this in a moment. In my process builder, each step is delegating work to my assignees and approvers and will direct them to the file and the section location where I would like them to provide their data. After building out the steps in your process, you're ready to run it. But before running the process, you can decide if you would like all of the steps in your process to run at the same time. Or if you would like them to run in sequential order, meaning that the first step would need to be completed before the next step, and so on. For my data collection, I can send all of my requests at once.

When I hit Run, the experience will now switch from the builder experience to this monitor view. What's happened here, is that we have sent an email to the assignees to notify them of their task. From the email, the assignee can navigate to their task in Workiva to complete their work.

The running process will also automatically handle permissions on my spreadsheet. Looking at permissions again, you'll be able to see that each of my collaborators have now been added to permissions. The process will automatically grant and remove permissions depending on the state of the process. Assignees that are doing their work have edit access indicated by this blue pencil. When assignees complete their tasks, their permission will change from edit to view. At that time, we will notify the approver that the work is ready for review and grant the approver viewer access as well.

They then have the ability to approve or return the task. If the task is returned, the assignee will get edit access again to redo their work. When a task is approved, both the assignees and approvers will be left with view access. This ensures no subsequent edits on the document after the task has been completed and reviewed.

As the work progresses, the monitor will automatically update status and it will eventually start to look like this. In the monitor, I would like to point out a few other features. The first one is the remind feature here. One thing I will mention is that we leverage the existing reminder notifications with tasking, so collaborators in your process will automatically get a reminder the day a task is due and the day after. But if you would like to send Reminders On-Demand, you can easily remind all incomplete tasks from this dropdown here. Or if you would like to send an individual reminder, you can do it from this dropdown here. The other feature I would like to point out is the activity dropdown here, where you can view activity logs for your running process or export to CSV.

If you open the view. This shows all of the activities that have occurred since your process was started. Hovering on this, I will show a little bit more detailed information on what happened for that given activity. And we've also added a button here to help you navigate to that document and section location.

Another feature is the ability to make edits to your process that is in flight. So, for example, if I need to change the approver from myself to someone else, I can easily do that. With edits, I will point out that depending on the type of edit that you are making, we sometimes force a restart on the task. For example, if you're changing the assignee, we will force that task to be restarted so that the newest assignee is notified. You can also optionally restart the action as well.

Finally, one more thing to point out here is that if you have stakeholders in your process that are asking for frequent status updates since the process monitor is a file in Workiva you could add that stakeholder as a viewer to your process and then share a link with them so that they can see the live status update on their process.

Now this is everything that is in production today. Lots of exciting features to come that will enable us to automate these existing use cases as well as new use cases, and we're really looking forward to it. Thank you for listening.