



Using Time Constraints in Workflow Rules

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Hour(s) Based Time Constraints

If you are building a workflow that contains optional reviewers, there are two main scenarios in which including an hour(s) based time constraint is valuable.

1. If a workflow only contains optional reviewers and you do not need to set a minimum number of reviewers, an hour(s) based time constraint could limit the amount of time the tier has to provide their feedback.
 - Example: A workflow tier has 3 optional reviewers, 0 minimum required. If you set your time constraint to 48 hours, it will begin counting down as soon as you route your review.

Reviewer Requirements

	Required	Optional
Greg Dixon	<input type="radio"/>	<input checked="" type="radio"/>
Gwen Derby	<input type="radio"/>	<input checked="" type="radio"/>
Grace Deng	<input type="radio"/>	<input checked="" type="radio"/>

Minimum # of Reviewers

Enter minimum number of optional reviewers required before moving to next tier.

0

AND / OR

Time Constraints

Enter a time constraint that will move project to next tier after the required and min. number of potential reviewers have been reached.

48

Hours

OR

2. If you would like to provide additional time for optional reviewers after either required reviewers or a minimum number of optional reviewers is met, then a time constraint can be used to add additional time to a workflow tier.
 - Example: A workflow tier has 1 required reviewer and 4 optional reviewers with 2 minimum number of optional reviewers required. If you set your time constraint to 24 hours, it will begin counting down as soon as the 1 required reviewer and 2 of the optional 4 reviewers have submitted their reviews. It would provide 24 additional hours for the remaining 2 optional reviewers to complete their feedback. If they do not submit their review, it would move forward once the time has elapsed.

Reviewer Requirements

	Required	Optional
Christy Drucker	<input checked="" type="radio"/>	<input type="radio"/>
Megan Diaz	<input type="radio"/>	<input checked="" type="radio"/>
Michelle Corey	<input type="radio"/>	<input checked="" type="radio"/>
Mike Malone	<input type="radio"/>	<input checked="" type="radio"/>
Pam Martel	<input type="radio"/>	<input checked="" type="radio"/>

Minimum # of Reviewers

Enter minimum number of optional reviewers required before moving to next tier.

2

AND / OR

Time Constraints

Enter a time constraint that will move project to next tier after the required and min. number of potential reviewers have been reached.

24

Hours

OR



When using time constraints, if all reviewers submit their feedback, the system will move the proof forward. The workflow will not wait for the remaining time to elapse. An hourly time constraint cannot be edited once the proof is out for review.

Tier Deadline Time Constraints

Workflow tiers can have specific deadlines set to move the proof forward after that date/time passes. Tier Deadlines can only be set at the time of proof routing.

1. After adding reviewers to your tier, click **Add Rule**.

2. Under **Approval Settings**, create the applicable status rule for this tier.
 3. In the **Reviewer Requirements** section, ensure that all reviewers are set to **Optional**. Required reviews must be met in order for any tier to move forward, and have the potential to prevent a tier deadline from functioning as intended. Therefore, the system will not allow you to set a tier deadline if any reviewer is set to required.
 - *Any reviewer added to the tier after the proof is released is considered a **required reviewer** by the system. Their review must be submitted before the tier deadline passes in order for the tier to move forward automatically. This includes adding reviewers from the Proof Info page, sharing the review or @mentioning during the review.*
 4. Choose a **minimum number of reviewers** the tier requires, when necessary.
 - *If you leave the minimum number of reviewers in your tier set to 0, the proof will stay in that tier until the deadline passes, no matter who submits a review.*
 - *If you want the workflow to move forward once a certain number of reviews are submitted, be sure to change the minimum number of optional reviewers to something greater than 0.*
 - *If the minimum number of reviewers is not met before the deadline passes, the tier rule will respect the deadline and move forward.*
 5. Under the **Time Constraints** section, **choose a date and time** that you would like to move the proof forward.
 - *All subsequent tiers must use the same time constraint type. For example, one tier cannot have an hourly time constraint while another has a deadline time constraint.*
 6. After you've selected the date and time, click **Save**. Follow the same steps for all tiers in your workflow as needed.
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Rule Settings

Approval Settings

Move forward if

☒ All

☐ Any

Status is set to

☒ Approved as is

☒ Approved with changes

☒ Not Relevant

☐ Change and resubmit

☐ Contact me

☒ Skipped Reviewer

Rules

Move forward if all statuses include Approved as is, Approved with changes, Not Relevant, or Skipped Reviewer

☐ Route to contacts in this tier sequentially

☐ Allow Reviewer Forwarding
Only valid when proof setting is selected.

☒ Send Email Notification to Reviewers

Reviewer Requirements

	Required	Optional
Christy Drucker	<input type="radio"/>	<input checked="" type="radio"/>
Megan Diaz	<input type="radio"/>	<input checked="" type="radio"/>
Michelle Corey	<input type="radio"/>	<input checked="" type="radio"/>
Mike Malone	<input type="radio"/>	<input checked="" type="radio"/>
Pam Martel	<input type="radio"/>	<input checked="" type="radio"/>

Minimum # of Reviewers

Enter minimum number of optional reviewers required before moving to next tier.

3

AND / OR

Time Constraints

Enter a time constraint that will move project to next tier after the required and min. number of potential reviewers have been reached.

Hours

OR

6/30/17 05:00 PM

CANCEL

SAVE

- After the proof has been released, you can **edit the tier deadline** before the tier has progressed. Navigate to the Proof Info page and select the applicable deadline to make any changes.


Proof Info - Product Label

RENOTIFY PREVIEW +VERSION SPAGES

ARCHIVE

Proof Details EDIT

Proof Status
● Out for Review

Proof Assets
 DOWNLOAD

Proof Name
Product Label

Project Name:

Access Code
0cd1ad

Deadline

Owner
Paul Morad

User Group

Advanced Options SHOW

Reviewers List ADD

Megan Diaz
Marketing Director
megan@truesoap.com
RV

Christy Drucker
Creative Director
christy@truesoap.com
RV PM

Rule
Move forward if all statuses include:
Approved as Is, Not Relevant, or Skipped Reviewer
Deadline: 10/20/2017 05:00 PM

Tier 2 See Tier Settings

Tier Settings
Total reviews: 3
Move forward if all statuses include:
Approved as Is, Not Relevant, Skipped
Reviewer Sequential: No
Allow Reviewer Forwarding: Yes
Required Reviewers: None
Minimum Optional Reviewers: 3
Time Constraint: No
Deadline: 10/20/2017 05:00 PM

Activity Log

Date Posted: 10/12/2017 3:03:27 PM
Posted By: Paul Morad

8. Update the preferred date and time for the tier deadline and click**SAVE**.

Tier Deadline

10/20/17 05:00 PM

CANCEL

SAVE