Powered by Chemwatch

APPROVALS EDITOR

Version 3.0

APPROVALS CONSTRUCTOR

EMERITUS

GOLD FFX®

CHEMWATCH

Melbourne, Australia

2025

Table of Contents

Glossary of Approvals Constructor Terms

The glossary below provides vital information of terms utilised in the Approvals Editor.

Term	Description
Stage	List of actions, which can be reviewed by stakeholders. A stage is a main building block of workflow. The properties of a stage can be set for stakeholders and Approve/Reject/Return features.
Action	Basic element of the workflow, which can be a part of stage element only. Each such element allows stakeholders to do a specific action; for example, review SDS report, select a folder, complete the Risk Assessment (RA) report, etc. Note that some actions are required to be completed before going onto the next step. For instance, when a stakeholder arrives at the "Select Location" action, the result of this action must be at least having one selected folder. Additionally, elements could be "read only", which means that the stakeholders are not allowed to change data in these actions.
Approvals Workflow	This is a set of stages, actions, transitions, starting points, conditions and other elements that fully described the business process for the entire Approvals Module.
Starting Point	This is the point of the workflow which describes the beginning (with exceptions such as, "Registration step is required").
Parent Stage	A specific stage that doesn't contain any actions, but has "child" stages. It's the logical construction for the workflow which allows the stakeholder to send requests to several stages for parallel review (for example, several departments). The approval request can't be rejected from this stage.
Child Stage	This is a specific stage with actions, but linked to a Parent stage (part of parallel review).
Condition Stage	This is a specific stage without actions and stakeholders, which describes the transitions and related conditions for each of them (plus default transition if there is no condition passed).
Approve/Reject	This means the final **approval** and the end of the approval workflow (exit from the workflow); it means that the request is approved and will appear in selected folder(s), or that the request is rejected and no data will appear in the selected folders. The "Approve/Reject" feature for all requests can be set in the stage by using the drag & drop line from the respective stage to the Finish element in the Approvals Editor.
Return Request	Use this feature to return an approval request to previous stage(s); for example, to modify some values.

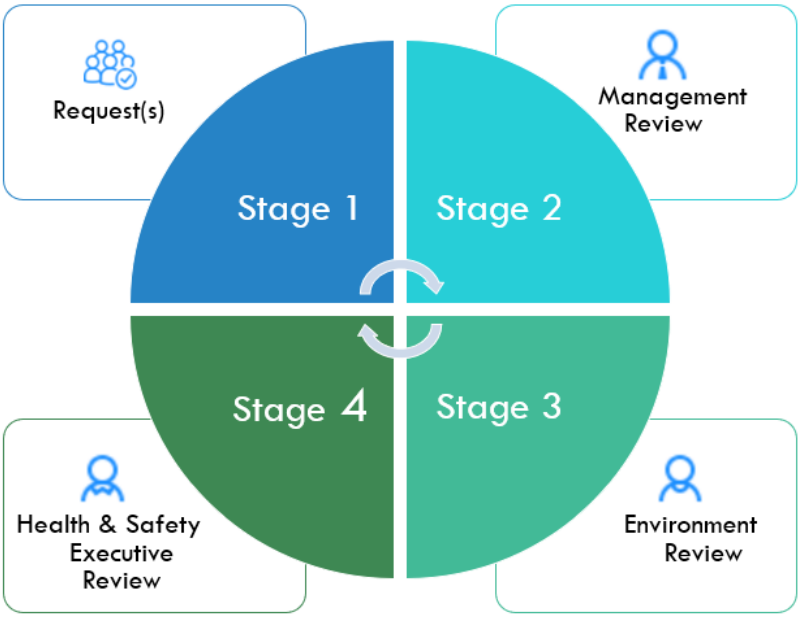
Term	Description
Finish Point	This is the final approval of the request. Refer to the term “Approve/Reject”.
Owner	This is the user (*request to be an “Owner”*) who starts a particular approval request. All requests can have one owner (per request) and can’t be changed.
Stakeholders	These are users who are responsible for review of approval requests on particular stages. According to configuration of workflow, stakeholders can be set by username, user group or user role.
Process Element	A specific stage without involving users (stakeholders) for review request. For example, if it’s needed to send a message to a specific email after a certain stage.
Transition	This is the process of the transit of an approval request between other elements (usually, stages) inside of the workflow. The transition element is displayed as a row in the editor (but outside of the stages) and it contains many levels of possible customisation.

1.0 Approvals Administrative Module Editor in Settings

Chemwatch has developed an "**Approvals Module Editor**" available in the Approvals Constructor Settings to enable businesses or organisations to create approvals' workflow for material/chemical requisitions that require approval. All approvals related requests for chemicals approvals in the Chemicals Management System will follow through a number of configurable workflow stages until the request is approved by a particular stakeholder. These approvals stages can also be assigned to workgroups based on:

- The control purchase of new chemicals
- Maintaining business compliance requirements
- Enforcing corporate or organisational values
- Fostering communication between parties within the work groups

Generally, organisations must maintain a sound workplace health and safety environment through robust policies and procedures relevant to chemicals management and the flow of chemicals in the workplace. The approvals editor is geared towards assisting business in creating a workflow process through a systematic procedural approvals flow of chemicals within the workplace. The general approvals workflow process in the Chemwatch application is based, on default, four approval stages.



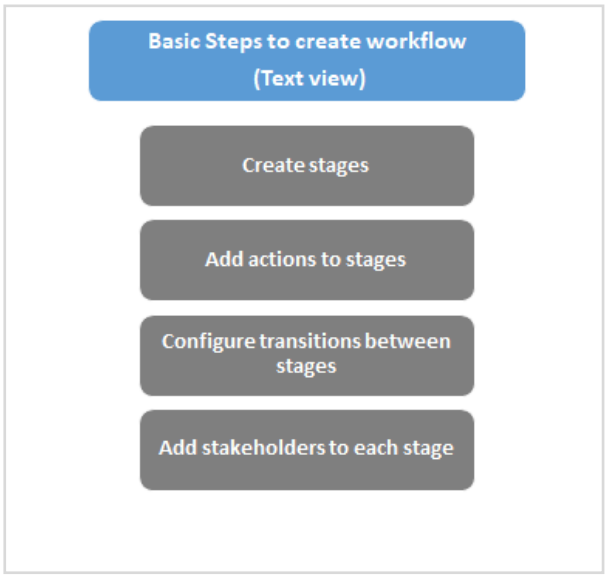
The Approvals Editor mode is located in Settings > Approval Constructor.

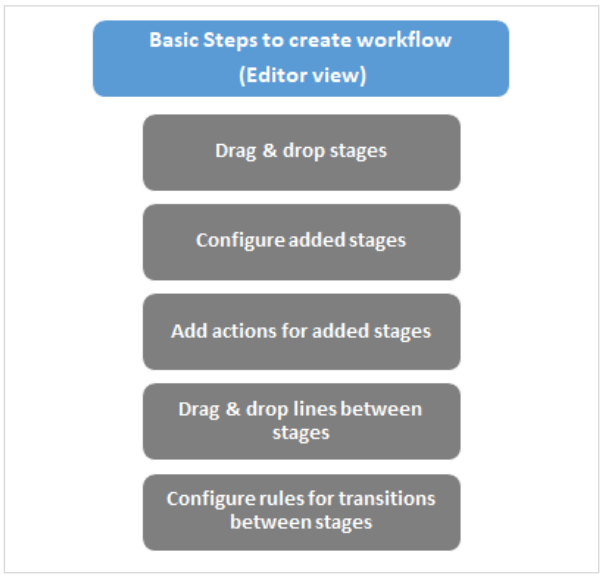
Settings and Access to Approvals Contructor

The administrator of the Chemwatch system has full access to the system including the Approvals Contructor settings. The Approvals Contructor contains an Approvals Graphical Editor which does not require separate permission but should be accesssible to the same users/managers who had access to the workflow contructor prior to the new implementation and release of the new graphical user interface. The approvals workflow is generally affected by additional settings that are managed by Chemwatch IT department. These internal settings are related to:

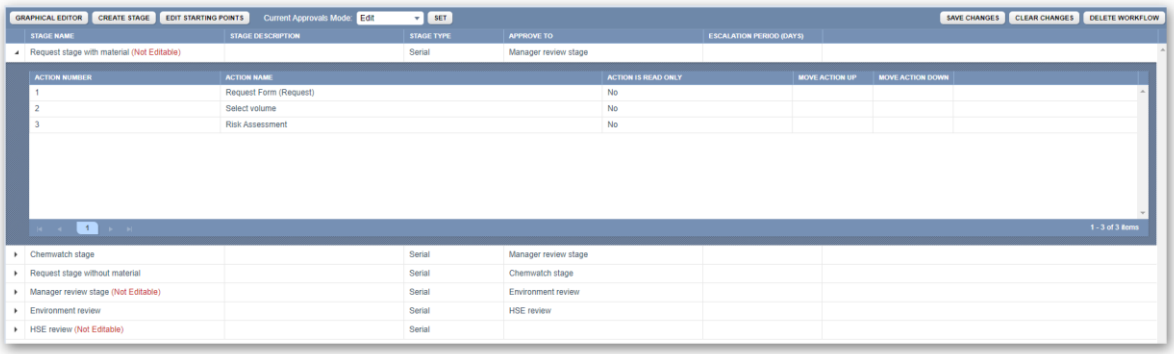
- Approval document requests
- Approval document requests where VGD (Vendor Gold Data) is required
- Approval document requests where SDS issue date is less then 2.5 years old

There are basic steps that the administrator/sub-administator of the Approvals Contructor must be aware of with regards to creating a workflow. These steps can be viewed as a text-based view or as an editor view.





For the **Text view mode**, use the Text Editor button to display the landing window below.

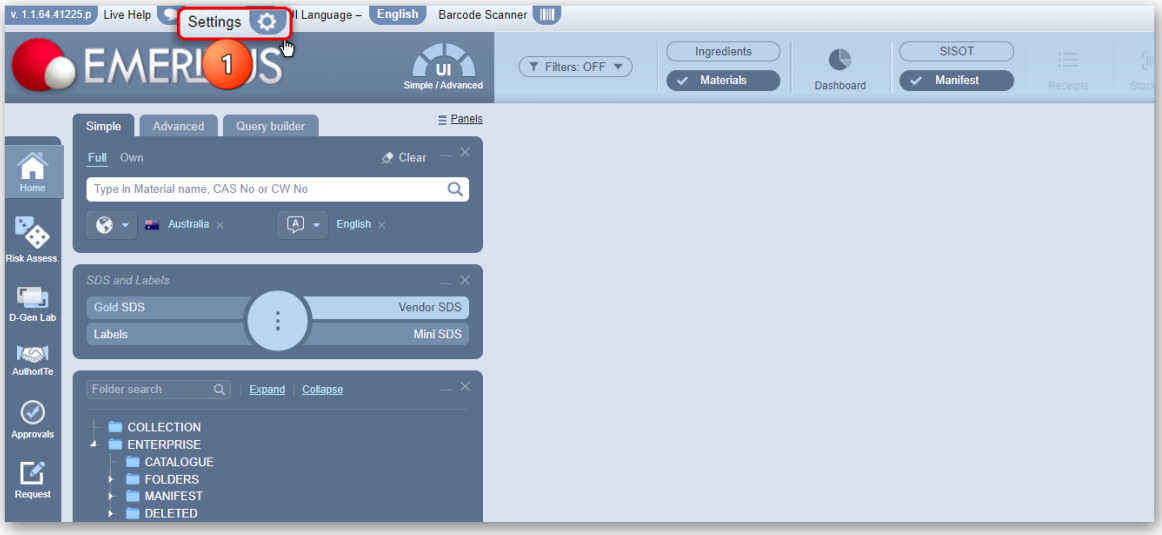


For the **Graphical Editor view mode**, follow the steps below.

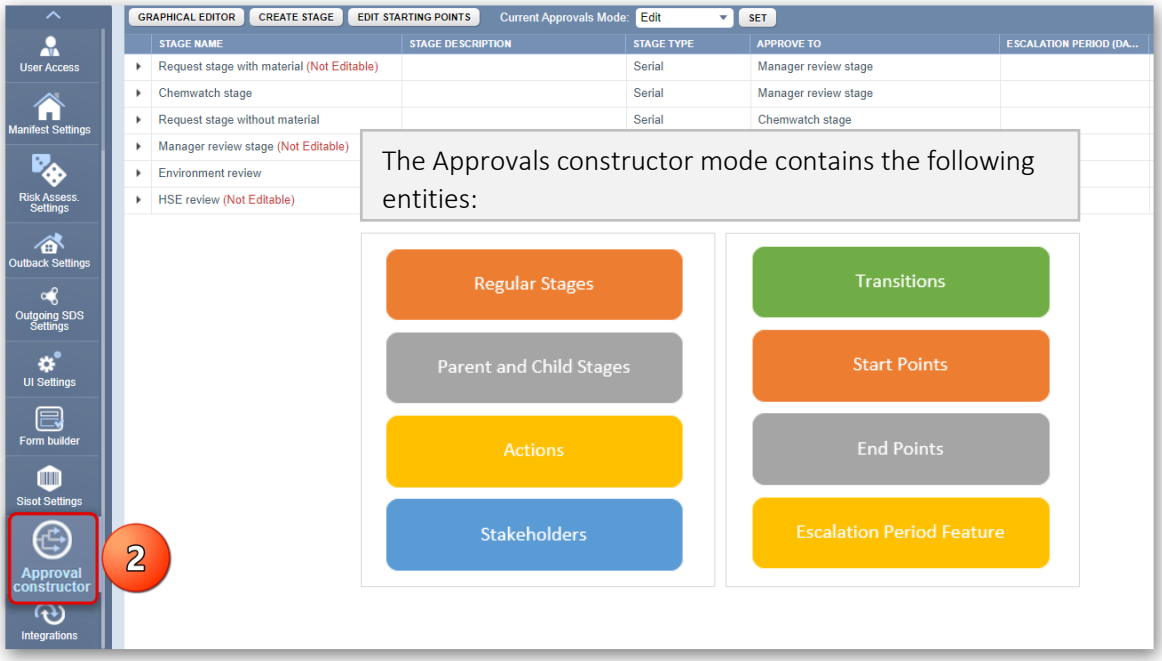
The following steps show how to open the Approvals Constructor mode in Settings module.

Steps: Open Approvals Constructor Mode

1. Click the **Settings** link or icon from the top left area of the user interface to open the settings module

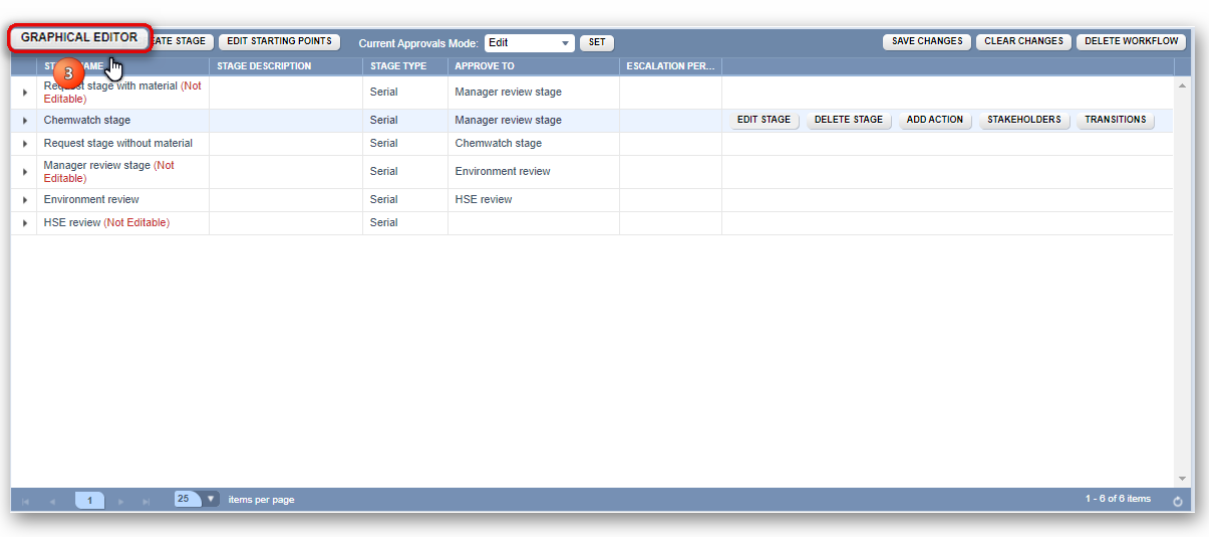


2. Click the **Approvals constructor** button at far bottom left pane of the UI.

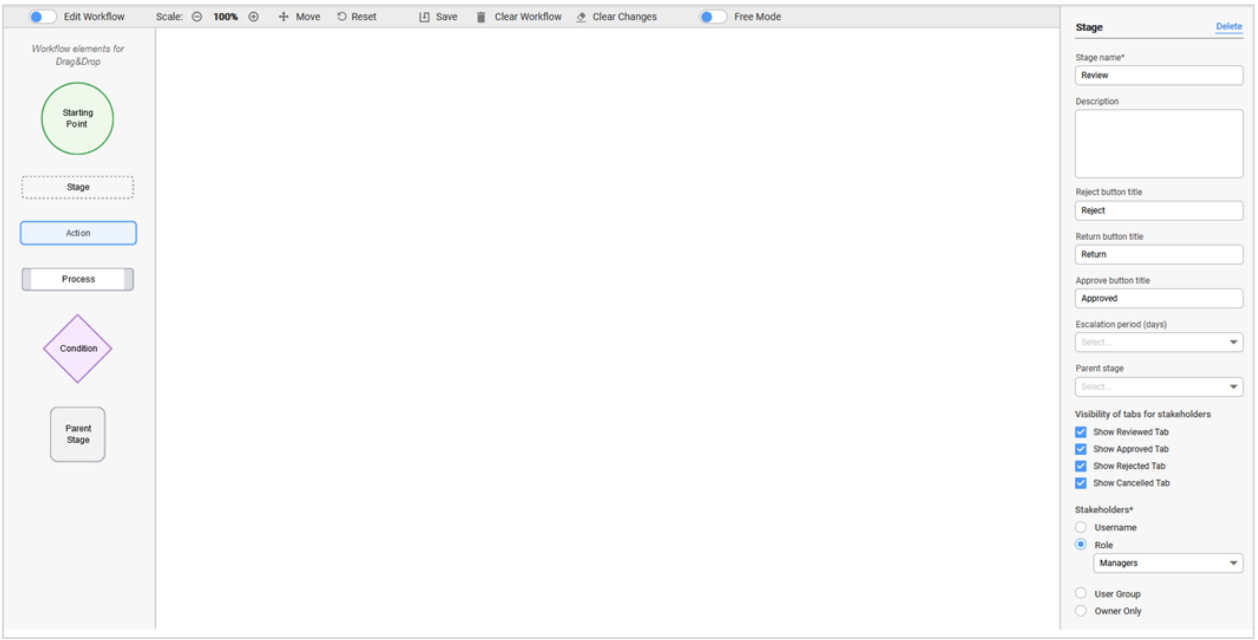


Approvals Constructor landing window

3. Click the **Graphical Editor** button on the header of the Approvals Constructor landing window.



4. The Approvals **Graphical Editor** landing window is displayed.



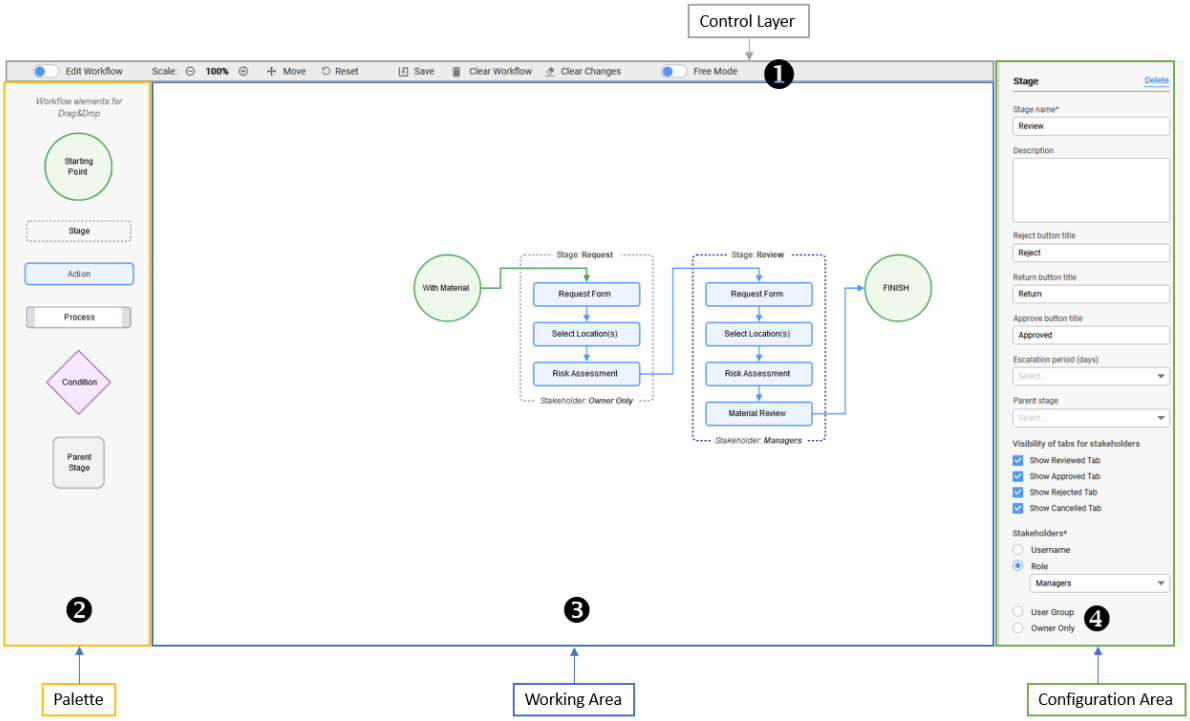
The Approvals Graphical Editor comprises of the following main components:

- The Control Area

- The Palette
- The Working Area
- The Configuration Area

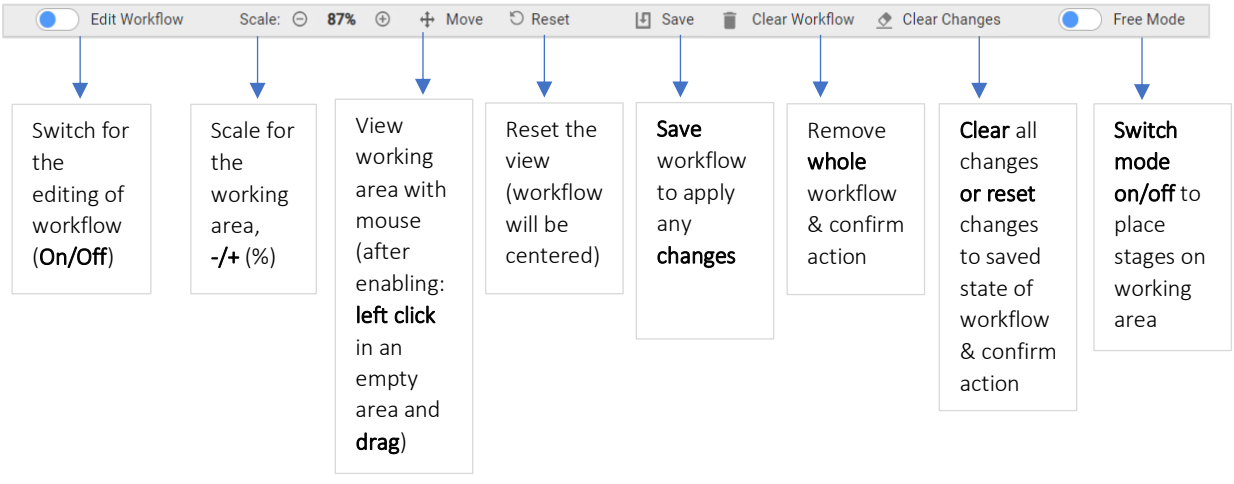
1.1 The Workflow Graphical Editor User Interface Descriptions

A general view of the workflow graphical editor for a selected stage is shown below, with the respective descriptions of the components of the interface.



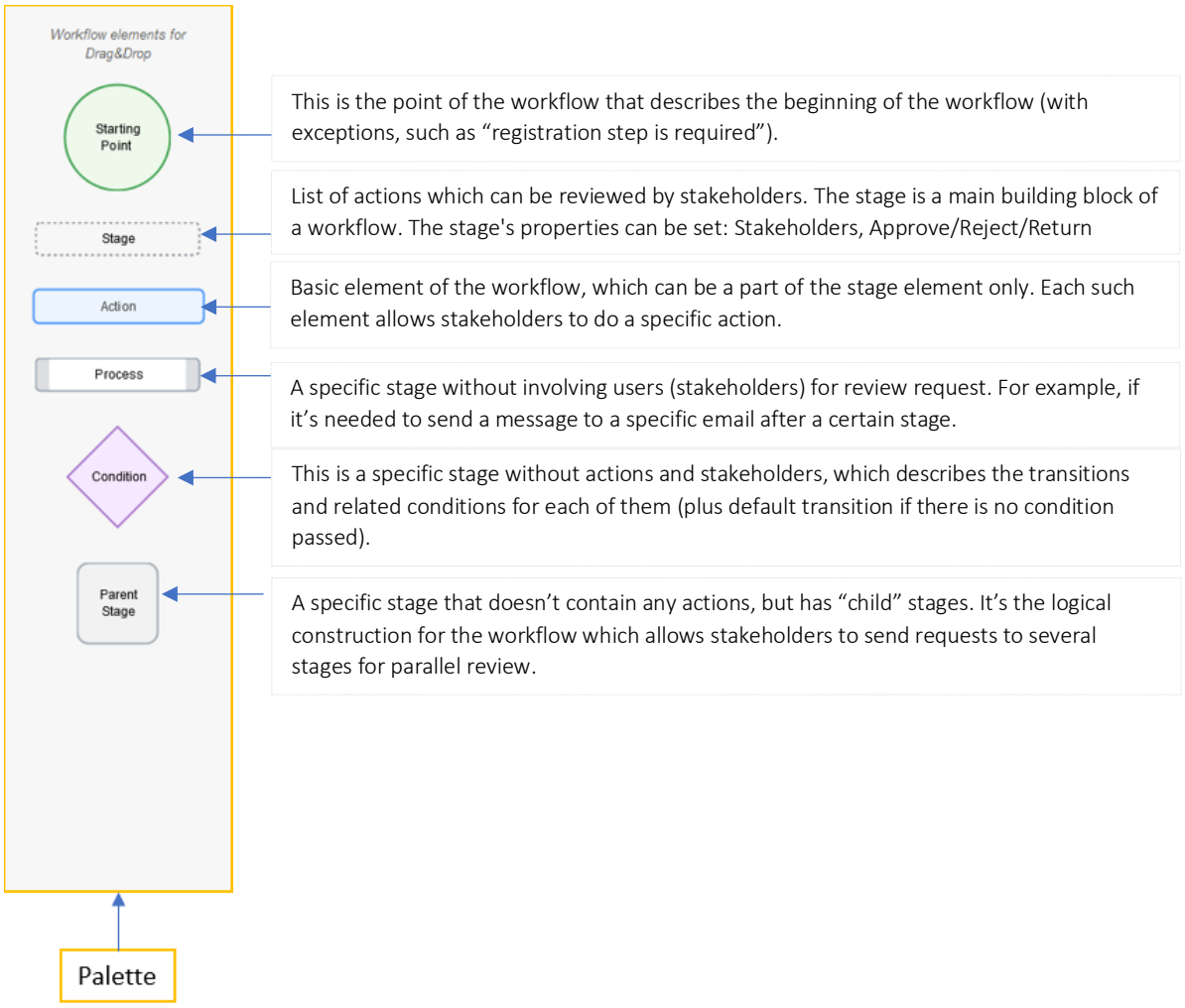
Descriptions of the various UI components of the Editor

❶ The **Control Layer**



❷ The **Palette**

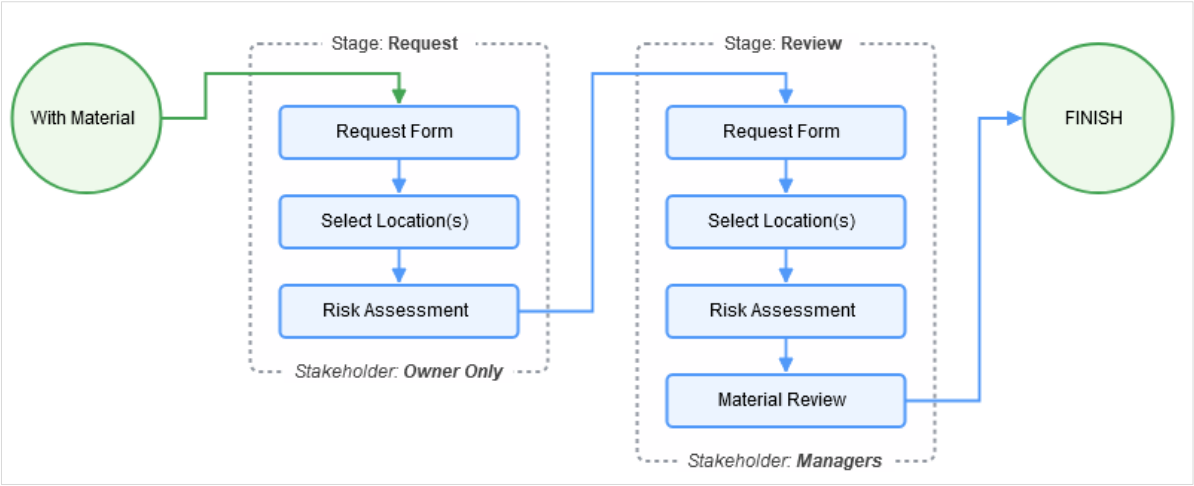
The palette is located on the left side of the editor and contains workflow elements to add in the workflow by using drag & drop function. The components of the palette are; Starting Point, Stage, Action, Process, Condition, Parent Stage.



❸ The **Working Area**

This is area where the actual workflow is displayed at the center of the user interface of the editor. This area will contain the starting point, and all the subsequent stages of the workflow until the end of the process. The following image shows a simple (basic) Approvals Workflow in the editor pane, which contains these stages with starting and finish points:

1. Request
2. Review



See the video link for instructions to watch "how the above simple workflow was created":

Each of the above stages of the simple workflow contain a list of actions:

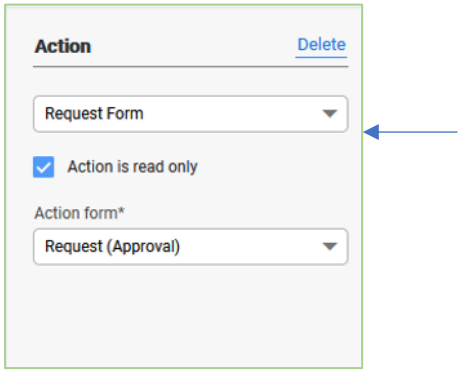
- **Request stage**: Actions
  - Request Form
  - Select Location(s)
  - Risk Assessment

- **Review stage**: Actions
  - Request Form
  - Select Location(s)
  - Risk Assessment

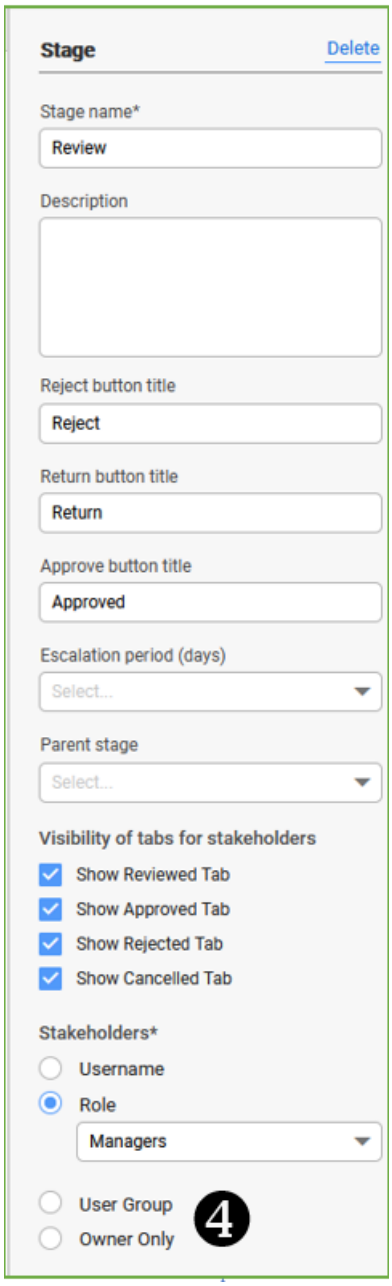
The single row from the Review stage to the Finish element means that this approval request could be approved from this stage only. In addition, the Reject and Return buttons/features were configured in the Review stage.

❹ The Configuration Panel

This is the parameters panel that is used to configure the various components of the workflow when setting up the Action, Stage or Transitions in the working area. The below diagram illustrates the Parameters panel. The action parameters panel enables the constructor user to set the action fields.



Action is a basic element of the approval process. Action is not an independent element and it must be a part of any regular (or "Child") stage. This element relates to the particular type of communication within the workflow: review (i.e., review Vendor SDS document) or adding the information (i.e., fill request form or select folders).



Provides a list of actions which can be reviewed by stakeholders. The Stage is the main building block of the workflow. The stage's properties that can be set are: Stage name; description of the stage; approve/reject/return; escalation period (days); parent stage; visibility of tabs for stakeholders; stakeholders' usernames; role; user group; and owner only.

More details are discussed in the Stages topic.

The workflow graphical editor user interface and functionality contains general rules and recommendations for consideration:

- Each workflow must have at least one starting point
- At least one stage must have a final approval button (Finish Point)
- No loops are allowed in the workflow
- Each regular stage (and condition element) could have multiple incoming and outgoing transitions
- A parent stage (and element process) could have multiple incoming transitions, but the outgoing transition is always one
- Child stages could have the only incoming and outgoing transition
- By default, an outgoing transition is displayed as a button on the top
- The outgoing transition button caption can be configured in the transition's parameters
- Any change of a workflow should be saved by clicking on the "Save" button
- Editing workflow must be OFF before using the Approvals module by end users
- Each stage and all the action in each stage must be configured
- The system does not allow modification of stages and its outgoing transitions that contain active requests on it
- Action cannot be set as "Read only" if it is placed the first time (i.e., on the line from Start to Finish)
- The workflow cannot be saved if it is not valid
- A workflow can be in two modes; i.e., the Active and Edit modes; the former means that the system is ready to work with requests and in the latter all requests are paused and it is not possible to modify requests
- The mode "Active" can only be set by the user who set it to "Edit" mode
- A workflow must at least contain at least one action: "Select Location" or "select Volume"

- The first stages of the workflow must not contain the "Return" button
- The "Tag separator" (if added) should be the first action on the stage
- Stages with "Chemwatch Registration" action should be in the branch of "Without material" or "With material" starting points
- "Chemwatch Reports (Multiple)"; "Incompatibility Report"; Storage Limits/Placarding"; "Risk Assessment"; "Static Report"; "Select Location"; "Ingredient Review"; "Material Review"; and "Select Volumes" should be placed after the "Chemwatch Registration" action in the workflow branch
- All folder-dependent ways (it won't let me add a comment, but what does "all folder-dependent ways" mean?) in each branch should contain the same set of configured folders
- Each folder-dependent transition should be placed after non- "Read-only", "Select Location(s)" or "Select Volumes" action
- A "Risk Assessment" action should be placed after non- "Read-only" "Select Location(s) or "Select Volumes" action in the workflow branch
- All stages that are allowed to bypass (bypass what?) should not have "Approve" and "Reject" buttons
- Every Parent stage should have at least one Child stage
- Last stages in the workflow should contain an "Approve" or "Reject" button
- Each "Automatic Approval by Tags" transition should be placed after non-"read only", "Select Location(s)" or "Select Volumes" action.
- Transitions with "Assign Automatic Tags" or "Enable Automatic Approve by Tags" options enabled should have tags assigned to them

1.2 Start and Finish Points

Start Points describe the conditions of the start of a workflow and approval process. The system currently supports three starting points of two types:

1. Regular start (no additional information is needed) - point name is ***With Material***
2. Registration required: no document exists in the system - ***Registration Starting Point***
3. Registration required: document exists, but additional data is required (create VGD) - ***Starting Point with CW Review***

In case of *Registration required* starting points, the first stage must only contain the action "Chemwatch Registration". Such stages must contain only the outgoing transition.

Recommendations for Registration stages:

- Stakeholder is **Owner**
- A **Name** for the transition

An additional starting point is available on the user interface, but still in development, is the SiSoT (Scan In Scan Out Technology) Starting Point, which is relevant to the SISOT module.

The **Finish Point** is a visual representation of the final Approval button:

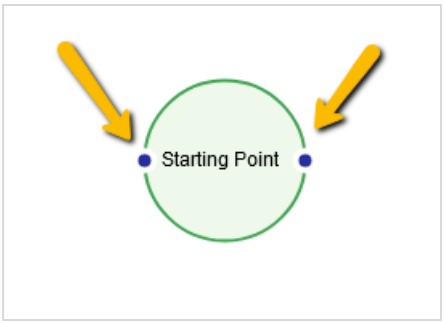
This is the only way to complete an approval request with the release of data (material/document, RA, volumes, etc.), to folder(s).

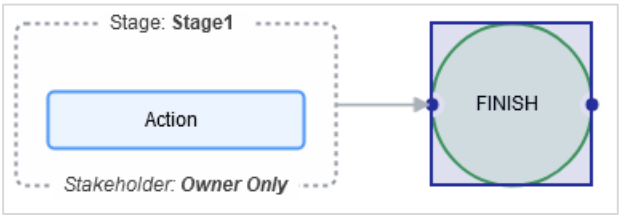
Transitions for Starting and Finish Points

Transitions can be added by dragging & dropping the line between elements:

- Hover mouse over the element
- Drag the line from blue circles

- drop the line on another Stage/Finish Point

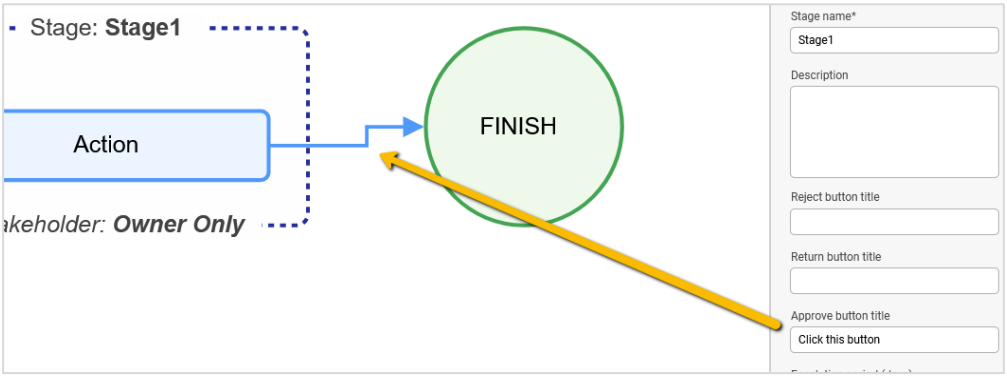




There is an alternative way to set a Finish Point (only); it can be specified in the stage's parameters:

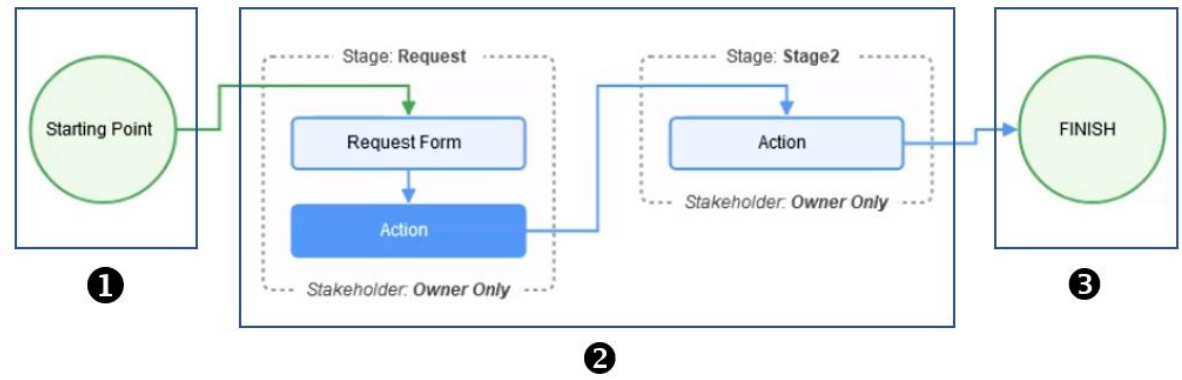
- Select stage
- Find label "Approve button title"
- Fill text into this text field (note: this text will be a label for the final approval button)

After this action the line (transition) between this stage and Finish Point will be created.

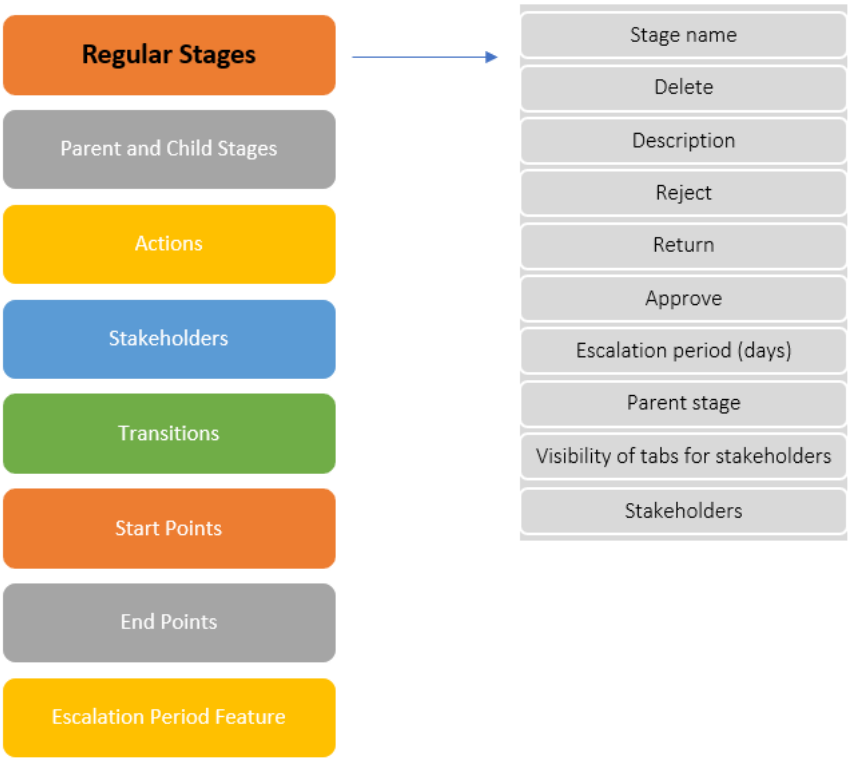


In summary, creating a basic workflow will involve the following overall main steps:

- Starting Point
- Stages and Actions
- Finish

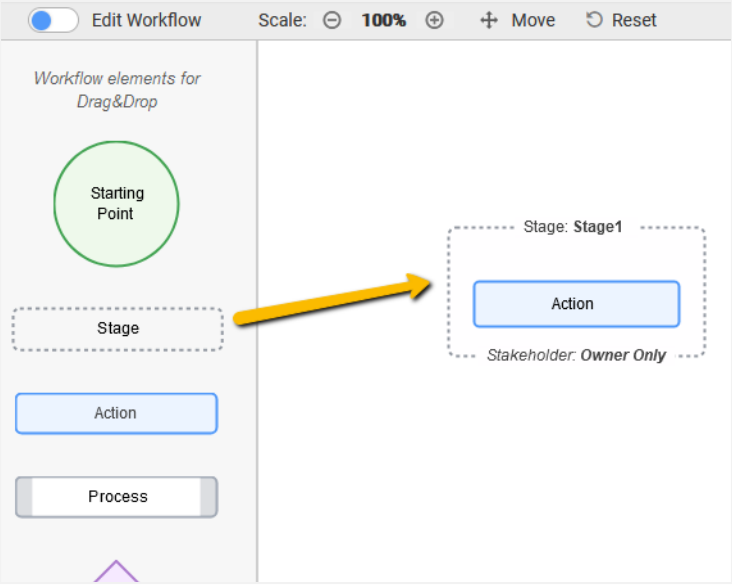


1.3 Stages



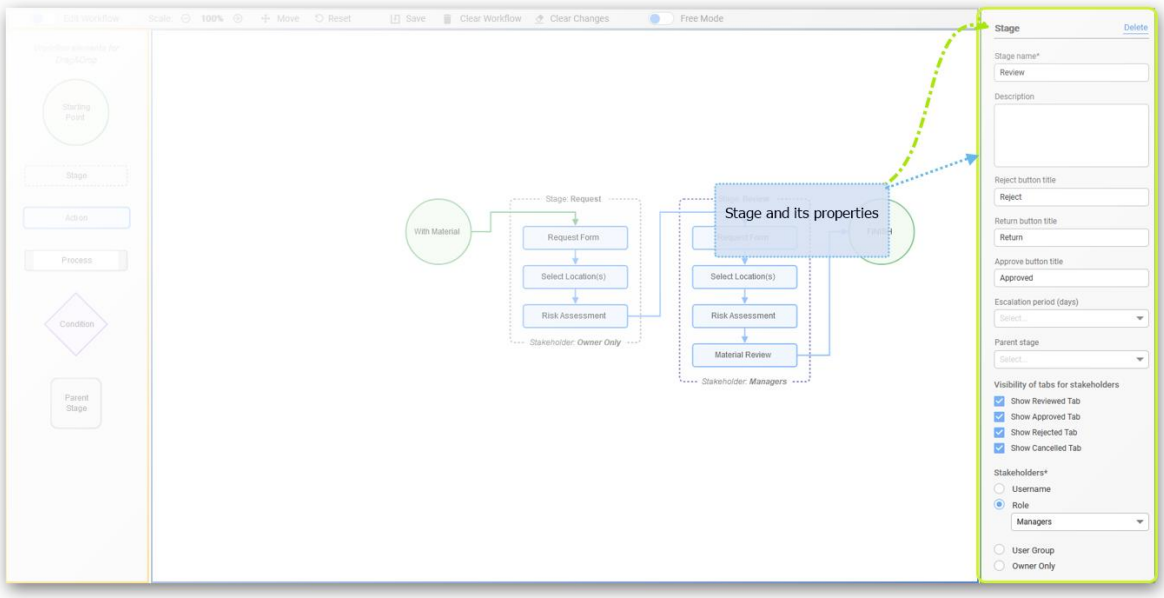
A stage is a logical construction which describes the list of actions that particular stakeholders have to view/complete before moving a request further by workflow. Possible cases here also include (according to configuration of workflow/stage), making a decision about the reject request, final approval of the request, or to return to the previous stages.

A **Stage** can be added to the visual workflow by dragging & dropping an element from the palette (from the left side menu).



Stage has parameters, and some of them are required to be set up. Stage must have at least one action (all actions also must be specified to make the workflow savable). Stage can have several incoming and several outgoing transitions.

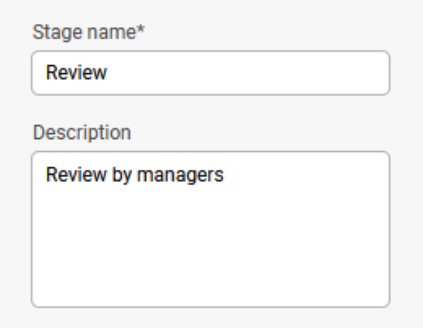
1.3.1 Parameters for the Stage(s) Component



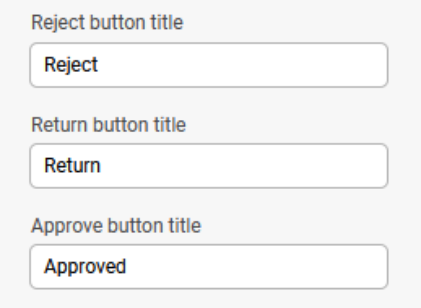
Configuring a Stage

The link "**Delete**" will remove the selected stage with all actions, incoming and outgoing transitions.

The "**Stage name**" is a required field, as this is the name of the stage which will be displayed on the workflow.



The "**Description**" is a brief explanation of the stage. It's an optional field and it will be displayed in the stage parameters only.



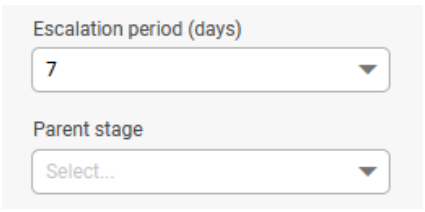
"**Rejected button title**"—This field is linked to the feature of Rejection requests. If the field is filled, then the reject button will be displayed on the UI for stakeholders and the button will have the same caption as this field.

"**Return button title**" —This field is linked to the feature of Returning requests to previous stages. If this field is filled, then the return button will be displayed on UI for stakeholders and the button will have the same caption as this field. Stakeholders will be given a choice for each request, in regards to which stage it should be returned.

"**Approve button title**"—This field relates to the feature of Approving requests. If this field is filled, then the approval button will be displayed on UI with the same caption. In addition, this action will be displayed on the workflow as a line from the respective stage to the Finish Point.

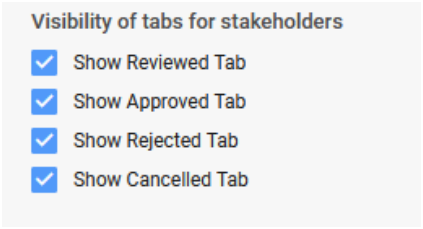
If any of the mentioned fields is empty, this button will not be displayed for stakeholders.

"**Escalation period (days)**" —This parameter will set an escalation period in days. If this parameter is set, then stakeholders will be notified (by email) that after the request, it remain at the current stage for *n*-days.

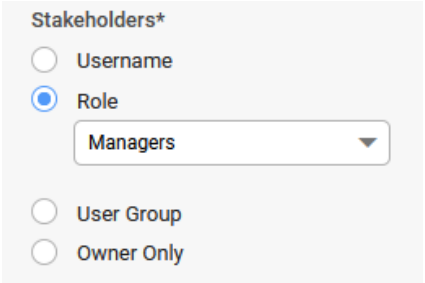


"Parent stage" —This is an optional parameter. If it is set, the current stage will become a Child stage (Continue reading for more information about "Child stages").

"Visibility of tabs for stakeholders" —This section relates to the visibility of appropriate tabs for stakeholders at the current stage.



"Stakeholders" (a required field) —This section identifies stakeholders for the current stage. Stakeholders can be set by username, role or (user) group by the owner only.



"Username" —If this option is set, then only the specified user will be a stakeholder in this stage.

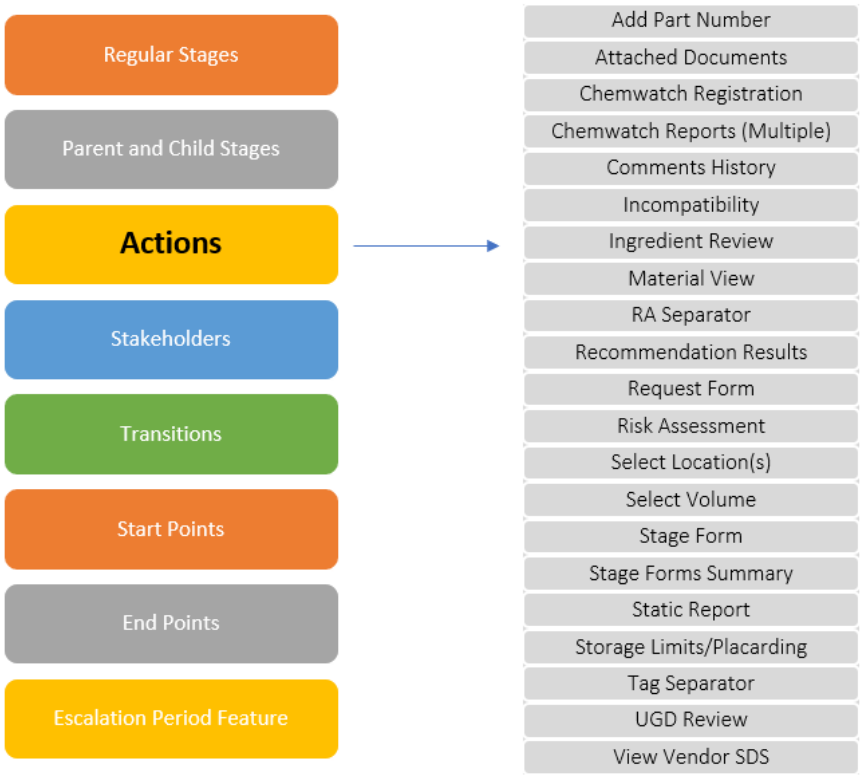
"Role" —Stakeholders will be set from a selected role.

"User Group" —Stakeholders will be set from a selected user group.

"Owner Only" —If this option is selected, then only the initial requestor (who started a particular request) will be able to proceed on this stage.

After a user is added or removed to/from role/group, then the list of stakeholders will be recalculated. For example, if role "Managers" is a stakeholder for stage and User has been added to this role, this user will become a stakeholder for all appropriate requests.

2.0 Actions



Action is a basic element of the approval process. Action is not an independent element and it must be a part of any regular (or "Child") stage. This element relates to the particular type of communication with the workflow: review (i.e., review Vendor SDS document) or adding the information (i.e., fill request form or select folders). Adding an action is performed by dragging and dropping an action element from Palette to the working area, into the previously added stage. The element becomes active, i.e., the menu is displayed on the right for (initial) configuration of the action. Action can be moved inside of the stage to change the sequence of actions; select an action by clicking the left mouse button and drag it inside the stage element to change the sequence. See below descriptions for all types of actions. Please note that some actions have required fields.

2.1 Add Part Number

This Action is used to capture organisational-specific identifiers (part numbers). Once a numerical digit sequence is established, the system will automatically generate the next number in the sequence. No alphabetic or special characters can be added. Part numbers are never shown to requesters or reviewers during the workflow. Part numbers can only be seen in the User-Vendor Part Number field.

2.2 Attached Documents

Attached Documents action is used to view documents that have been attached to the Form Builder's Form Field "**Upload**" button. Attachments can be viewed as an independent action step or in any stage in the workflow using the Documents button.

2.3 Chemwatch Registration

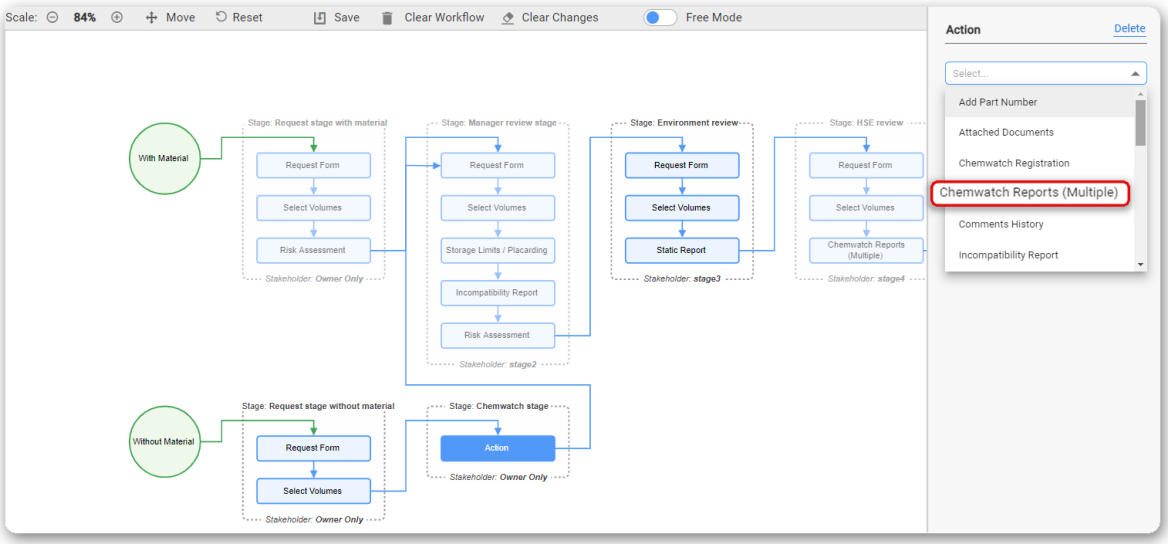
This action is used for:

1. Clients who want to register new material into the collection.
2. VGD (Vendor Generated Data) clients who want requested products to be registered and data extracted prior to entering the approvals workflow.

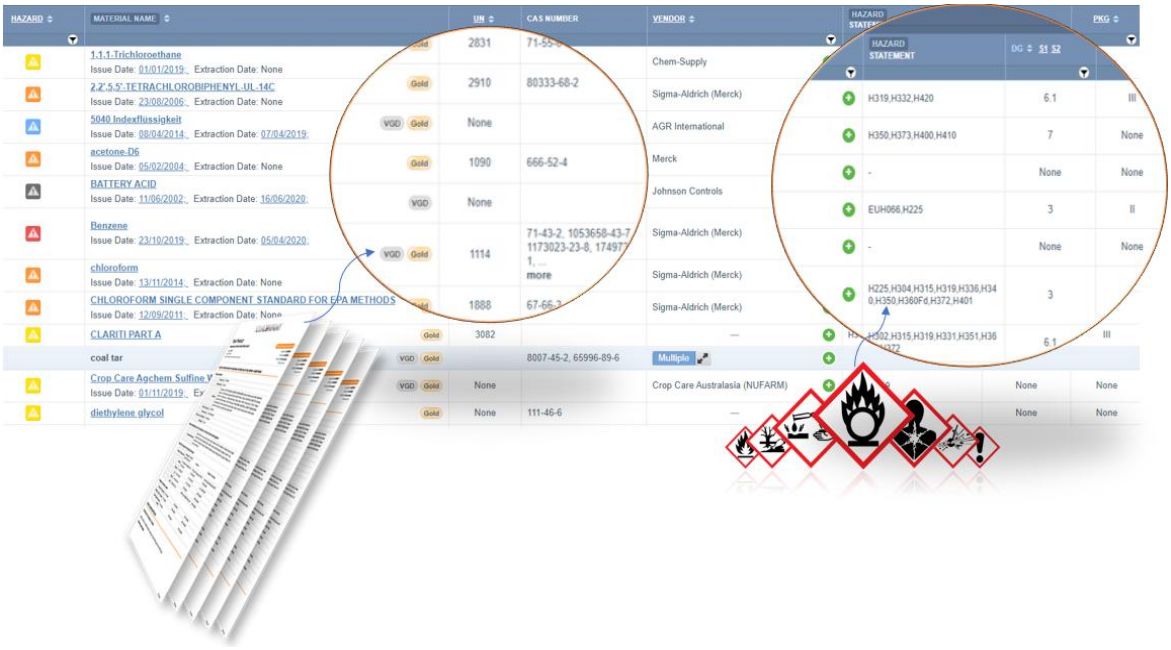
Chemwatch can provide a complete like solution with Vendor Generate Data (VGD), which is extracted and made available during the Data Extraction (VGD) phase of an SDS upload or SDS updating process initiated by Chemwatch client who has decided to utilise Chemwatch's Vendor Generated Data (VGD) solution. This solution is a service where key information from the Original Vendor SDS is extracted to identify DG codes, GHS codes, physical properties, composition, classifications (GHS, DHD/DSD, REACH, etc.) to be used in the system's many features and functionalities.

2.4 Chemwatch Reports (Multiple)

This action is used to view documents or reports in the action step viewing pane. The following reports are available:

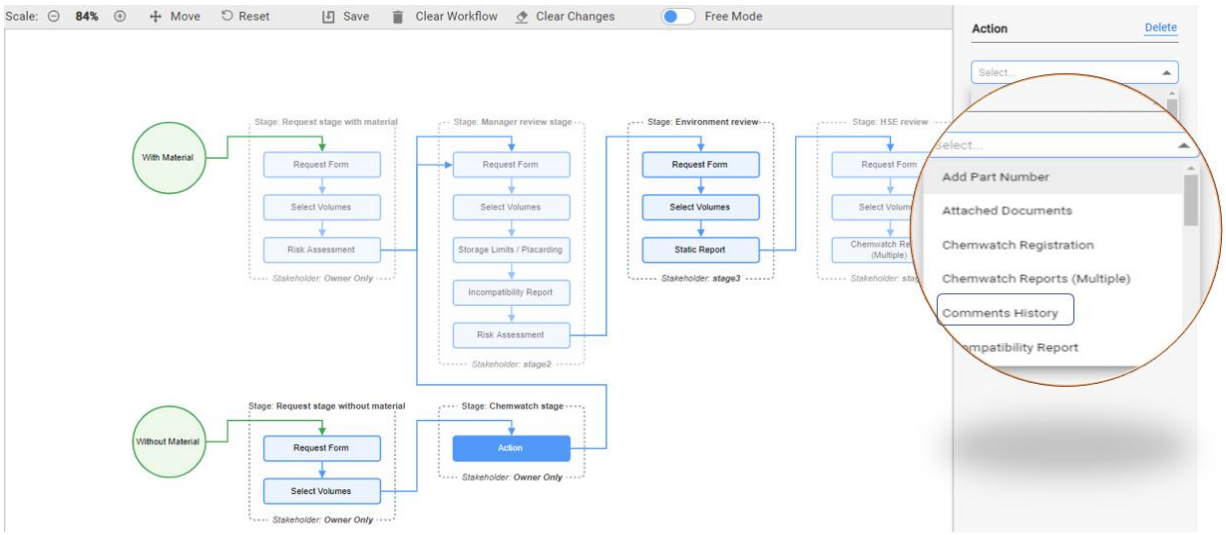


- China report
- Gold SDS report
- Mini SDS report
- Risk Assessment report (ILO)
- Risk Assessment report (UN)
- First Aid report
- Fire Fighting report
- China report
- Gold SDS report
- Mini SDS report
- Risk Assessment report (ILO)
- Risk Assessment report (UN)
- First Aid report
- Fire Fighting report
- Spills and Disposal report
- Advice to Doctor report
- Environmental report
- Personal Protection report
- Standard Operating Procedures (SOPs) report
- Toxicological report



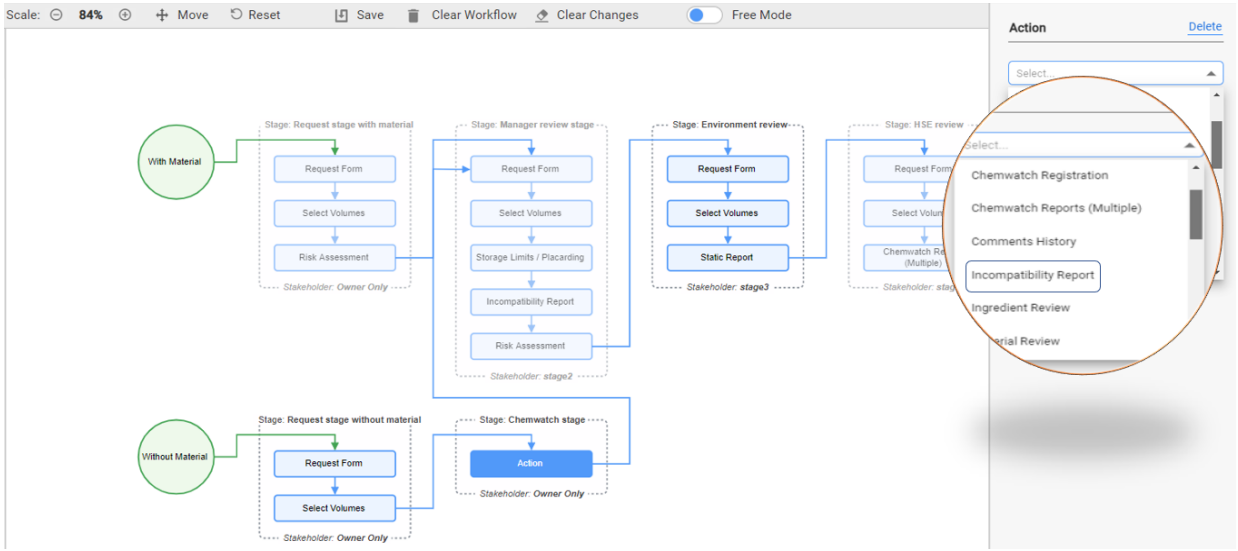
2.5 Comments History

This action is used to view the comments history given in the pop-up boxes between each stage. Comments can be viewed as an independent action step or they can simply be viewed via the comments button which is always available in the upper right-hand corner of a stage review.



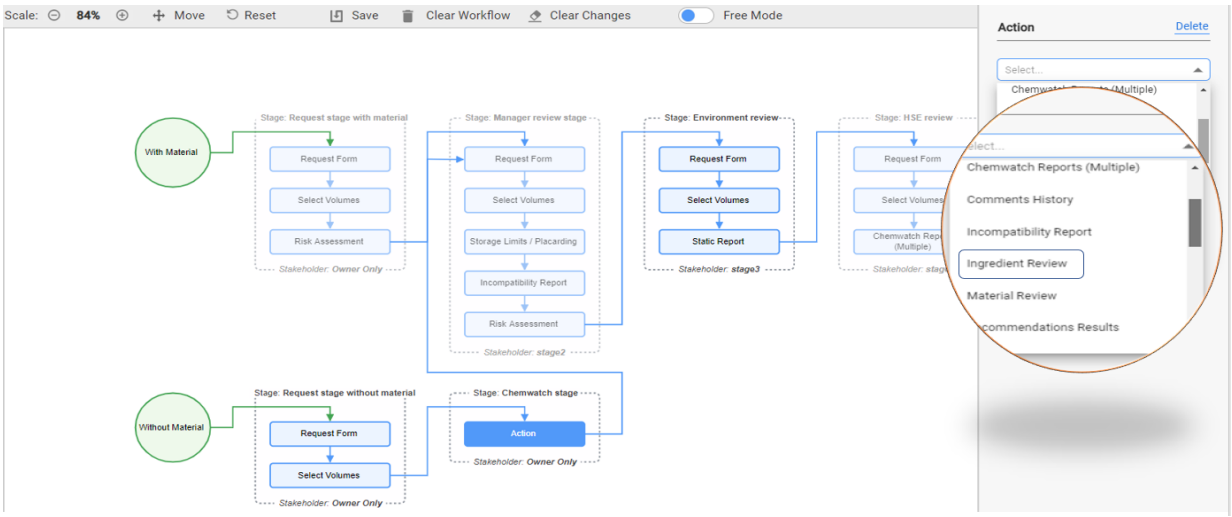
2.6 Incompatibility Report

This action is used to display the Chemwatch Incompatibility Report based on location. Please note: the report will be run against all ticked location folders selected in the Location(s) action step.



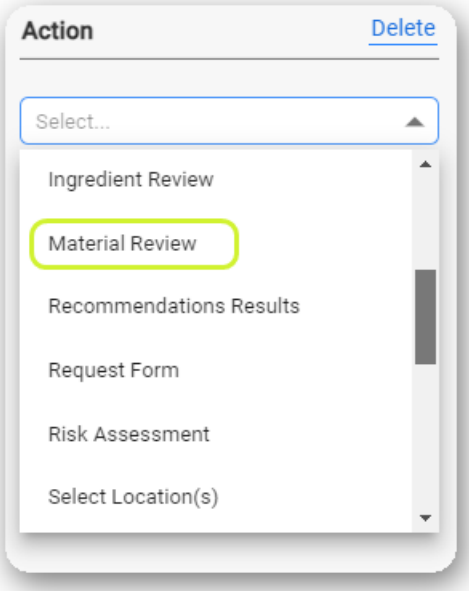
2.7 Ingredient Review

This action is used for reviewing ingredients and relative proportions. Ingredient data is derived from VGD data or GOLD data (Chemwatch datapoints) based on the client's preference domain settings. Additionally, if created, system tags will show in the "Tags" column. Tag-queries limits may apply. Please note that rendering time may be delayed, depending on the complexity of the tag queries.



2.8 Material View

The Material Review action displays a report which contains product name; material name; DG class; GHS pictograms; Hazards (Environment, Health, Physical); and Dangerous Goods (DG) specific categories.

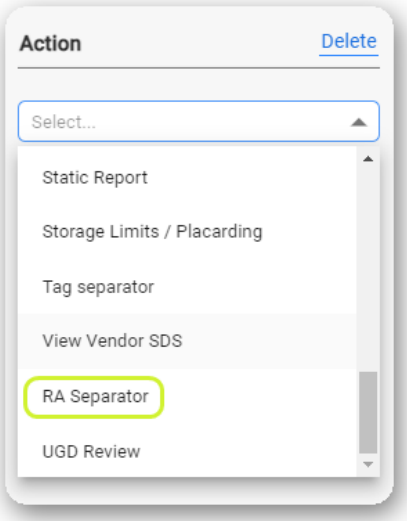


2.9 RA Separator

This element divides up RA ILO and UN actions. Some notes to consider:

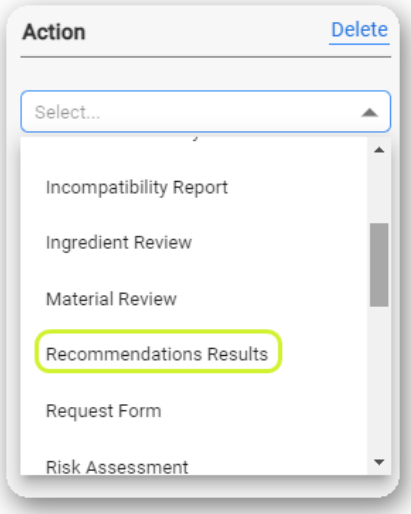
1. This action doesn't have a UI for reviewers.
2. RA action should be completed before the request comes to this action.
3. It also must be the last action at the stage, as it initiates transition to the next stage according to Risk value on RA action.

4. Each level (from 0 to 4+) must be set once only.



2.10 Recommendations Results

Recommendation Results is used to review the recommendations given during the parallel action steps. Please note that unlike other linear stages, parallel stages do not show the Reject and Return Button options. Instead, only two buttons are available: "Recommend" and "Not Recommended". Once either option is clicked a pop-up comment window will appear. All comments entered in this box will be shown in the recommendation results grid. This allows stakeholders to review recommendations given from the stakeholders in the parallel stage as a part of their review. In the case where more than one parallel stage exists in a workflow, the parent stage can be defined for the recommendation results.



2.11 Request Form

This section shows the request form used to capture data stored against the material once approved. Request forms can be viewed in edit or read-only mode in any subsequent workflow stage. Allowed types of forms for this action include:

- Approvals type
- Folder-material type

2.12 Risk Assessment

This action is used to perform or view an ILO or UN Risk Assessment. It can be applied to more than one stage. For instance, USER A could fill (or partially fill) out the Risk Assessment while USER B could review the Assessment done by USER A in read-write or read-only mode. The action step has all of the same functionality as Risk Assessments performed in the Risk Assessment Module except for the right click functions found in the Risk Assessment module.

Please note: If multiple locations are ticked in the location tree action step, multiple risk assessments will appear in the action step viewing pane. This provides a means of completing a Risk Assessment per location.

2.13 Select Location(s)

This action is used to select the destination folder (via the folder tree) where the requested material will be approved and stored. This action step is required; a destination folder must be selected so the system knows where to place the item if/when approved. Please note, one or multiple locations can be selected within the tree. If approved, the item will go into all ticked location folder(s).

2.13 Select Volume

This action is used to select the destination folder (via folder tree) where the requested material will be approved and stored. This action step is required; a destination folder must be selected so the system knows where to place the item if/when approved. Please note: One or multiple locations can be selected within the tree. If approved, the item will go into all ticked location folder(s). Once a location is ticked, a pop-up box will appear which will allow the user to add a Volume/Weight. If approved this, Volume/Weight will be added to the Current Volume/Weight value in Home Folders/Manifest.

2.14 Stage Form

Stage form is used to capture data to be viewed by stakeholders in subsequent stages of the workflow. These forms can be viewed in a single action by stakeholder(s) downstream called "Stage Form Summary". Forms allowed for this action include:

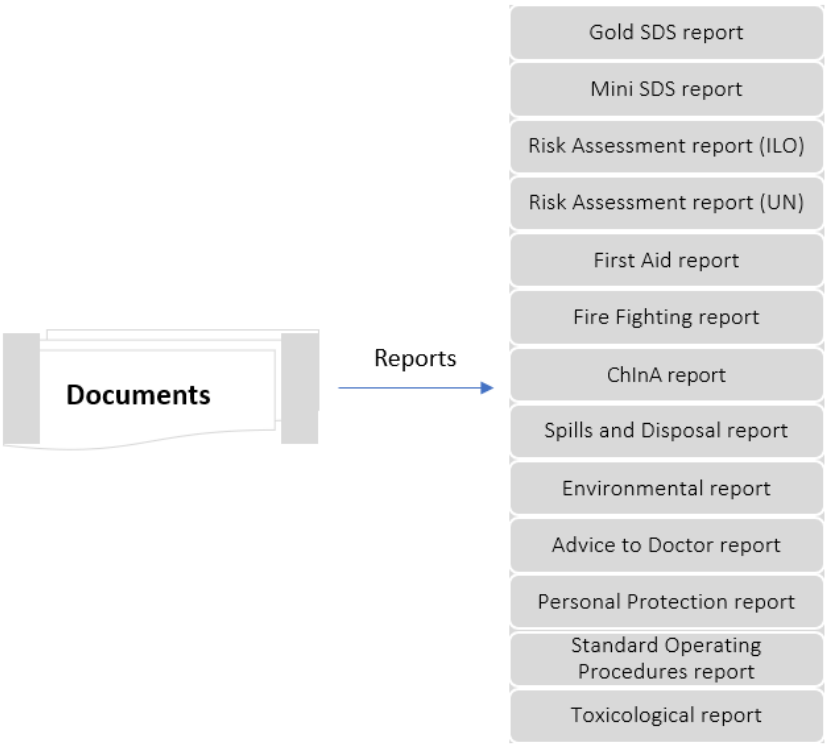
- Approvals type
- Folder-Material type

2.15 Stage Forms Summary

Stage Form Summary is used to review submitted stage form data. Stage form field submissions will be provided in an easy-to-read table format.

2.16 Static Report

This action is used to review a Chemwatch report as an action step. The following reports are available:



2.17 Storage Limits/Placarding

This action is used to review storage limits (volume/weight), DG, location information, and placard symbols.

2.17 Tag Separator

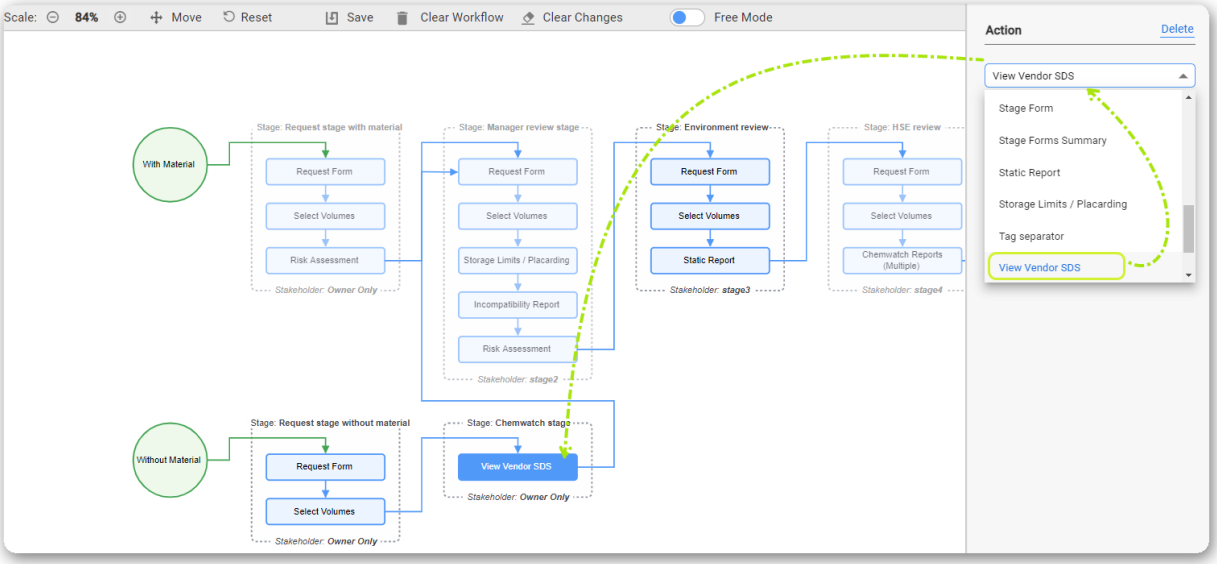
This action is used as a means of separating/splitting a workflow based on tag type. The workflow is split based on whether a product does or does not have tag/s. The client defines query tag parameters. Tag query limits may apply.

2.18 UGD Review

This action is used to create UGD (User Gold Data) for the approving item. The UGD dataset will be placed in a folder with a document in case of an approved request.

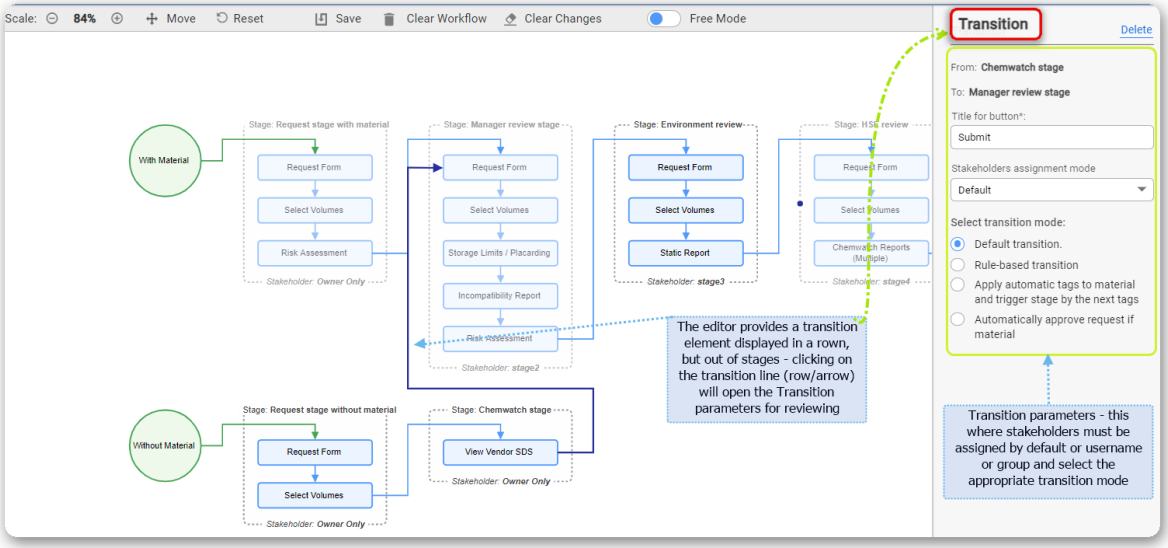
2.19 View Vendor SDS

Used to view vendor SDS. The request must be launched (via "Send to Approval" button) from the product version.



3.0 Transitions

Transition is a process of the transit of approval requests between stages (or other elements) inside of a workflow. The Transition element is displayed as a row in the editor (but out of stages) and it can be clicked on to view properties of customisation.



Transition can be configured by two types of parameters: stakeholders assignment modes or transition modes. Please note that a workflow doesn't allow combining these parameters—users can customise assignment mode OR transition mode.

3.1 Stakeholders Assignment Modes

Default—This is the active mode that is usually used in the approval process. Stakeholders for the next stage will be based on the available stage options; by,

- Username (a stakeholder)
- Role or User Group

In these cases, all users in the selected role or group will become stakeholders on the next stage.

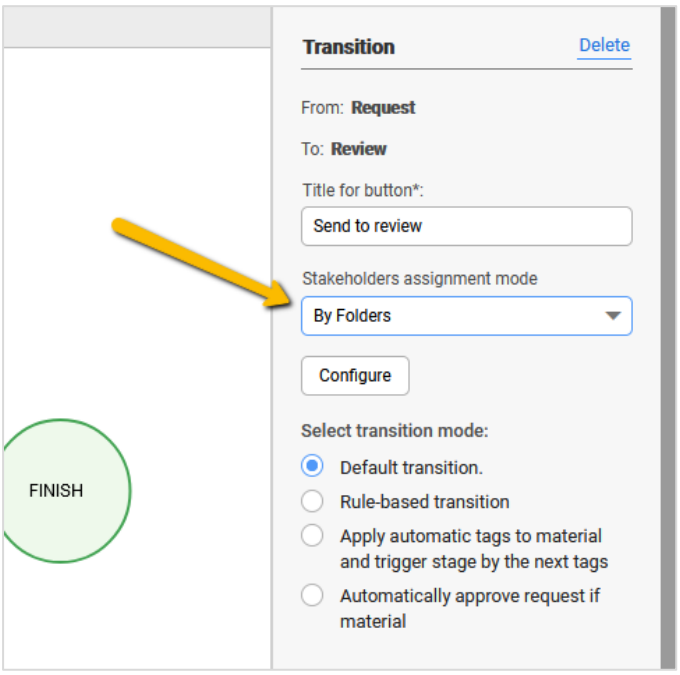
Manually—This mode is similar to the previous one, but forces the reviewer to select one user from the list of stakeholders for the next stage. These options make sense only if the role or group is selected as stakeholders for the next stage.

By folders—This is a specific way to assign stakeholders for the next stage by folders. It's possible to assign user group(s) and/or single user(s) as stakeholders for the next stage. Please see below for detailed information on how to use such type of assignment mode.

Please note the following limitations for this mode:

1. The Approvals module doesn't check folders permissions, so if an administrator assigns a user as a stakeholder to a folder with read-only or deny permissions, such requests will be locked.
2. It is possible to select several folders for the request. If a workflow contains a "By Folder" assignment mode, then the system expects that stakeholder (of the next stage) **must** have read-write permissions for all selected folders. As an example, if the document is requested for folder-A and folder-B, and no stakeholder exists with read-write permissions to folder-A **and** folder-B, this request will be locked as well.
3. There are no "default" stakeholders for such assignment mode. If a specific folder has not been configured, then all requests for that folder will be locked.

Refer to topic 4.0 for more information on how to configure a "By Folder" assignment mode.

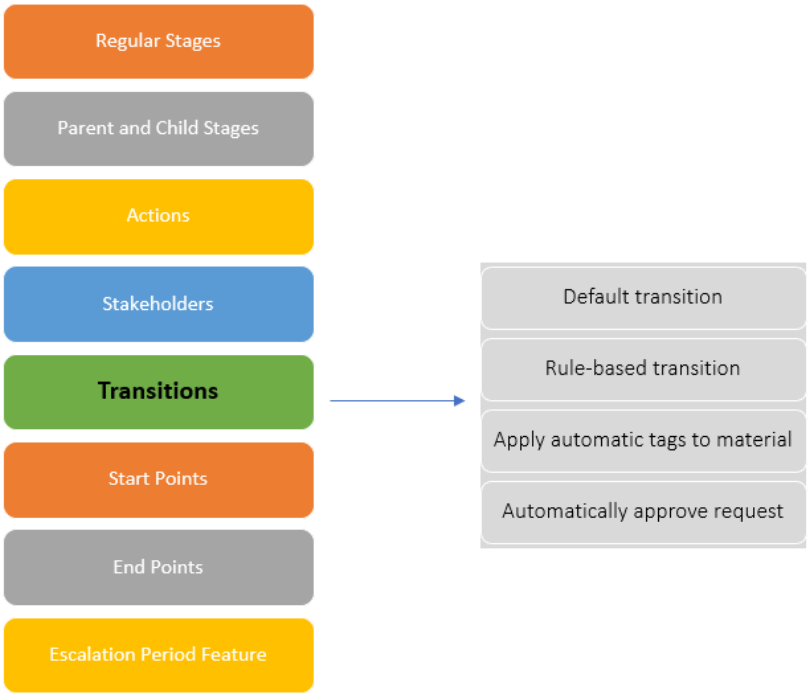


The next topic will look at the transition modes available in the application.

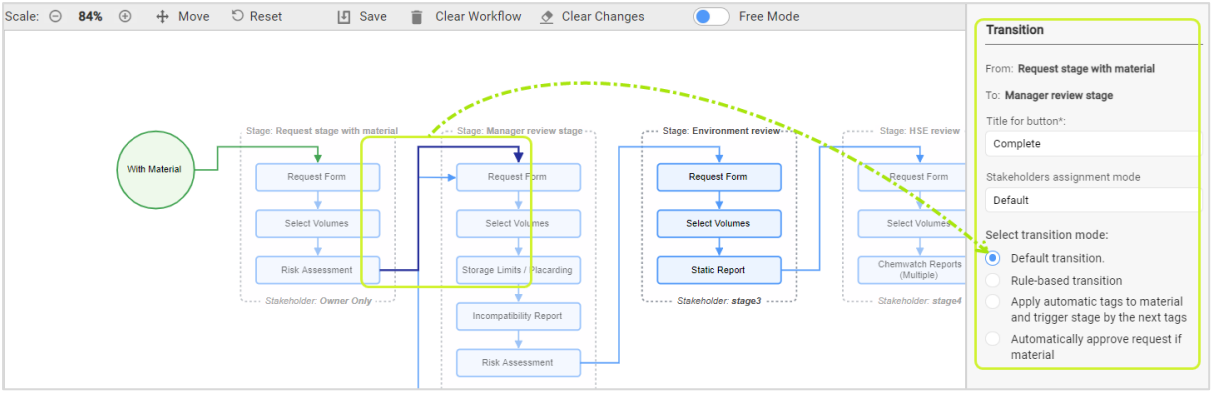
3.2 Transition Modes

The transition modes in the graphical editor are:

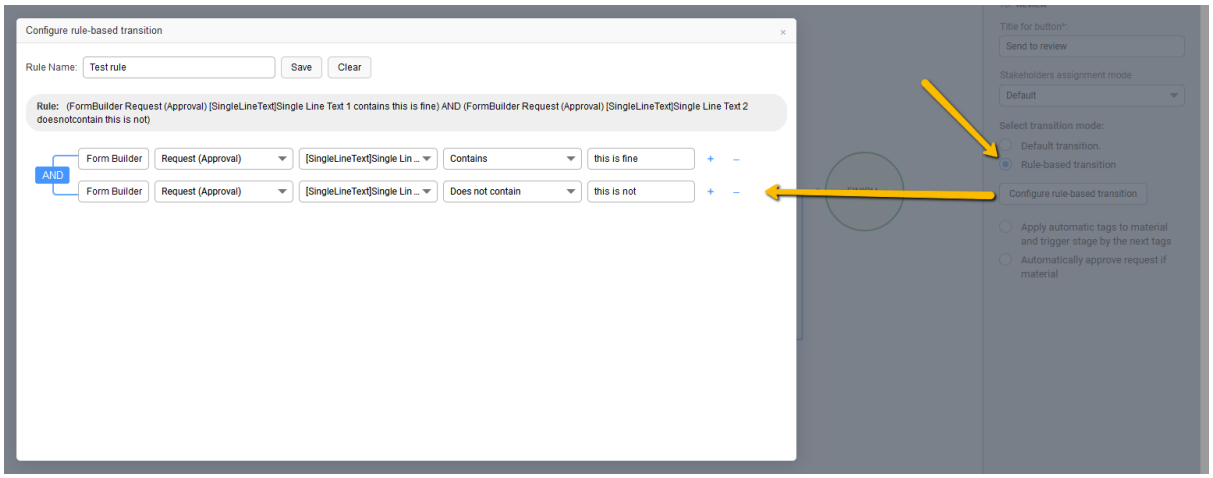
- Default transition
- Rule-based transition
- Apply automatic tags to material and trigger stage by next tags
- Automatically approve requests



Default Transition—A regular transition mode without specific rules or conditions. An example is depicted below for an already set default transition for a 4-pronged stage workflow. The below example illustrates the transition from stage 1 to stage 2 for a Risk Assessment task to a Request Form.



Rule-Based Transition—This option unblocks the transition to a particular stage if material/document matches criteria from request forms. If a user selects this option, then user could configure a specific rule based on values from request forms.



How can a rule be used?

For example, the rule, “Exact high” for the field “Risk of explosion” can be created. If a particular request has a “High” value for this field, then the stakeholders of the current stage will see an additional button (transition) from this stage to, for example, “COSHH review stage”.

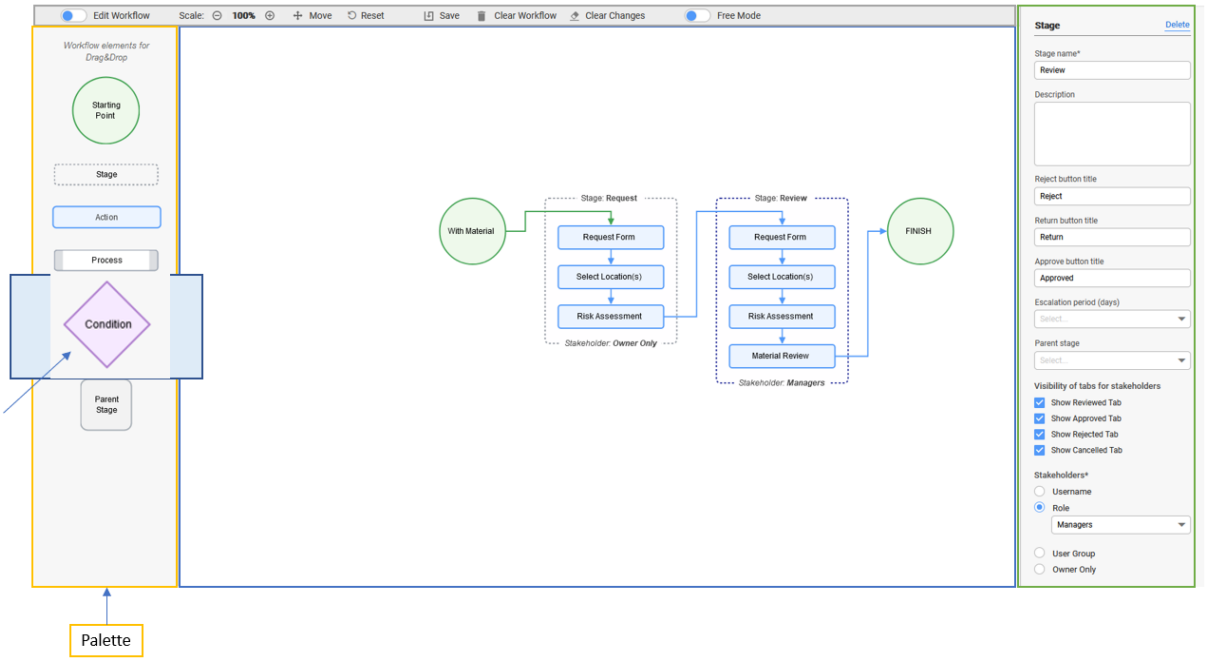
Apply Automatic tags to material and trigger stage by the next tags — This option unblocks the transition to a particular stage if material/document matches criteria for an automatic tag (note that such tags are linked to queries from Query Builder).

How it can it be used?

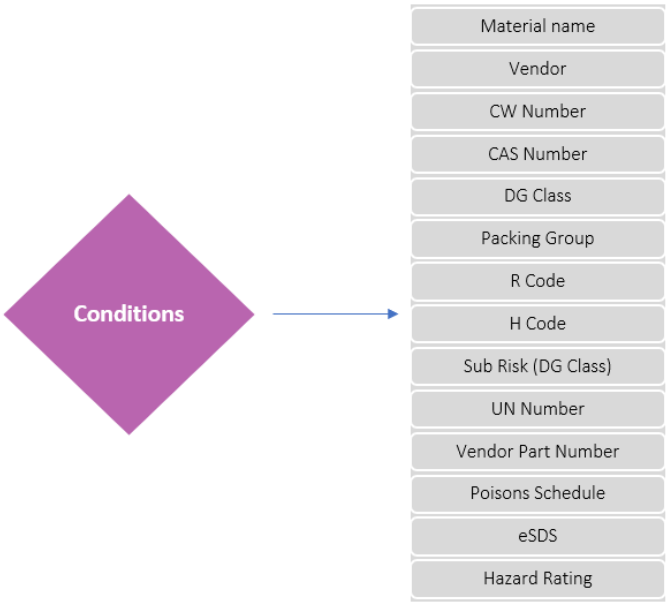
For example, a query, “contains H201” can be created, and an automatic tag, “H201”, can be linked to this query. After that, configure the transition “Send to Manager Review” to a special stage using “Apply Automatic tags…” mode. In this case a stakeholder of the current stage will see a button “Send to Manager Review” if material has H201. If material doesn’t have H201, this button (and related transition) will be hidden.

Automatically approve requests if material — If this attribute is set by selecting the condition and tag, then the stakeholder can immediately approve a request if the material/document has specific tags and it is leaving the current stage by this transition. It is possible to select several tags; in this case requests will be approved only if an item has or doesn’t have all selected tags.

4.0 Conditions

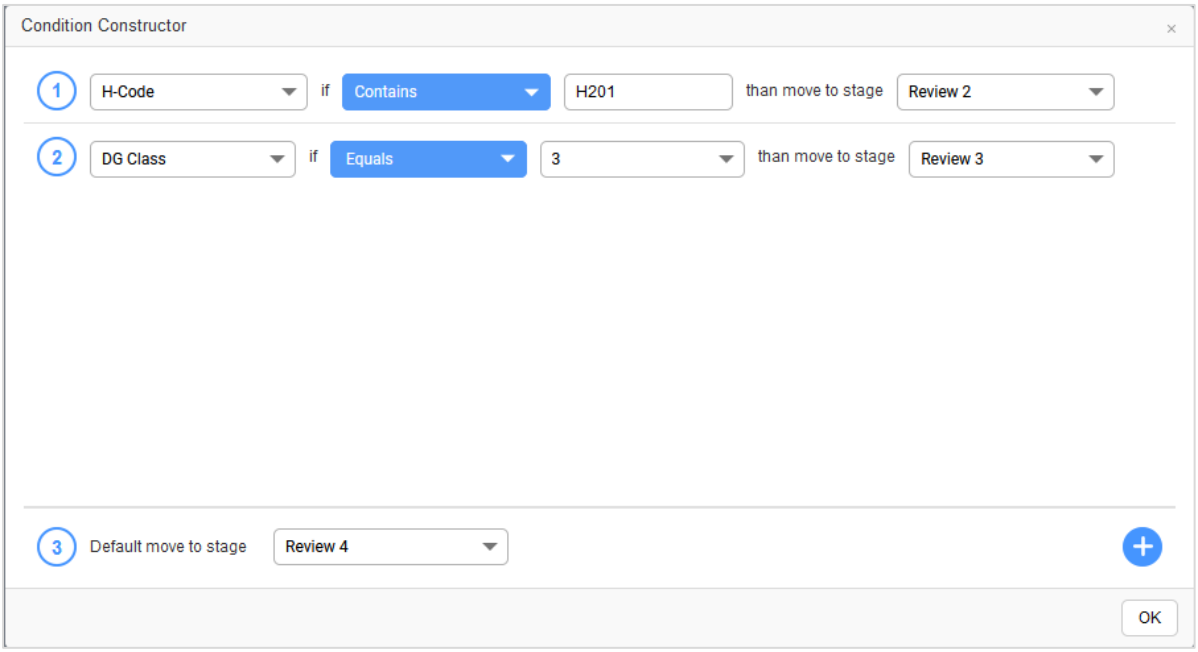


Conditions is a new element which allows stakeholders to send requests to specific stages, according to its chemical characteristics or datapoint:



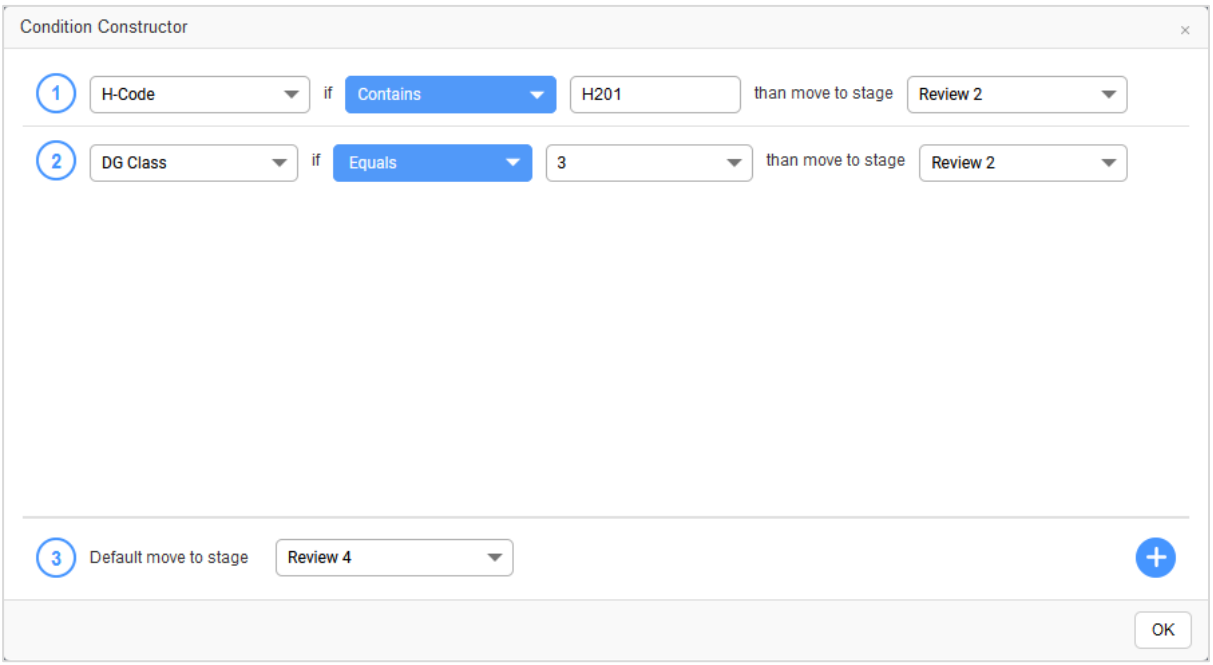
Adding a Condition element is performed by drag and drop an element from Palette to the working area. Therewith, the element becomes active, i.e., the menu is displayed on the righthand side for (initial) configuration of the element. The Condition element cannot have actions or stakeholders—it automatically checks requests with the conditions and moves items to stages according to the described conditions. This element can have several incoming and

outgoing transitions. All outgoing transitions should be configured by a special rule. One of the outgoing transitions is a “default” transition, which it if no other conditions are passed. Default stage is the only required transition from this element/stage.

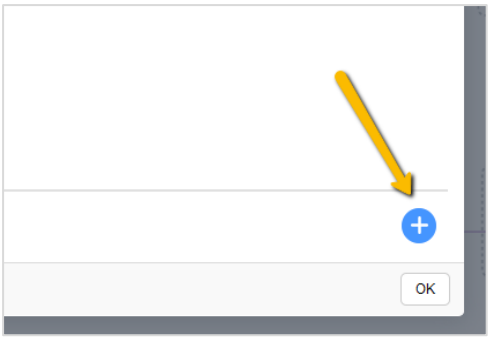


Conditions are checked in turn, from top to bottom. For example, if material has H201 and DGC=3, then the request will be moved to stage “Review 2” because it’s the first condition from the list that passed.

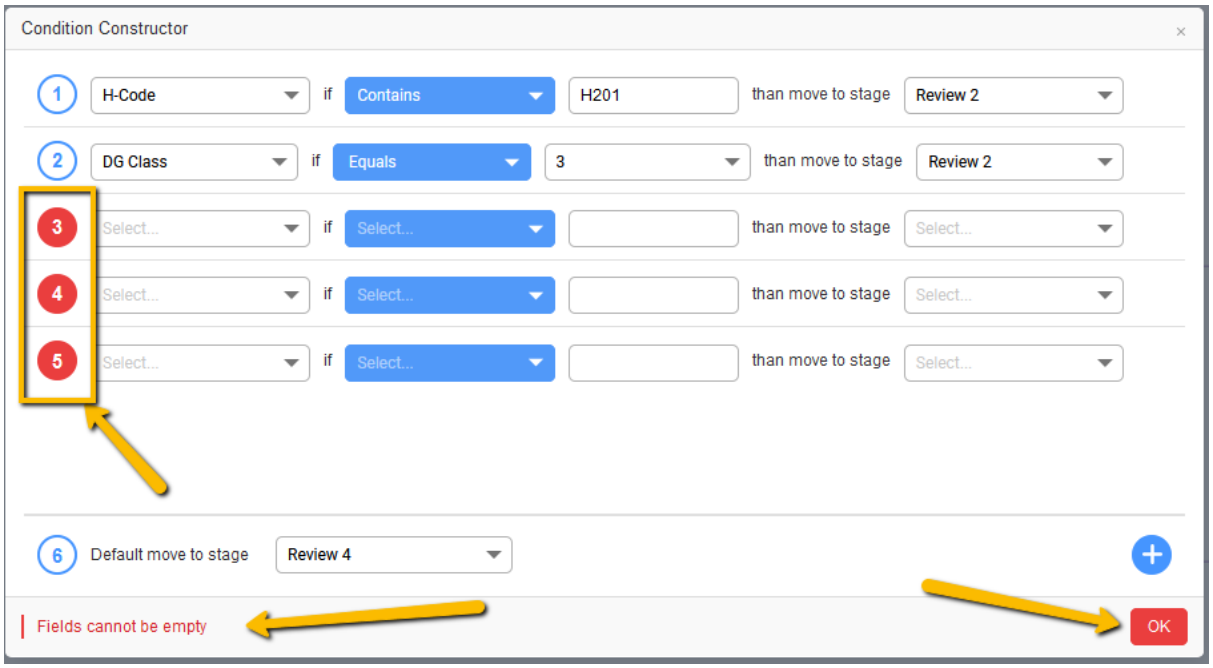
Several conditions can be linked to the same stage—for example, if material has “H201” code or DGC=3:



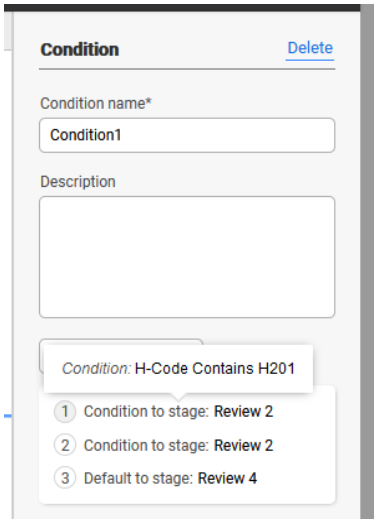
New conditions can be created by clicking on the plus button on the editor:



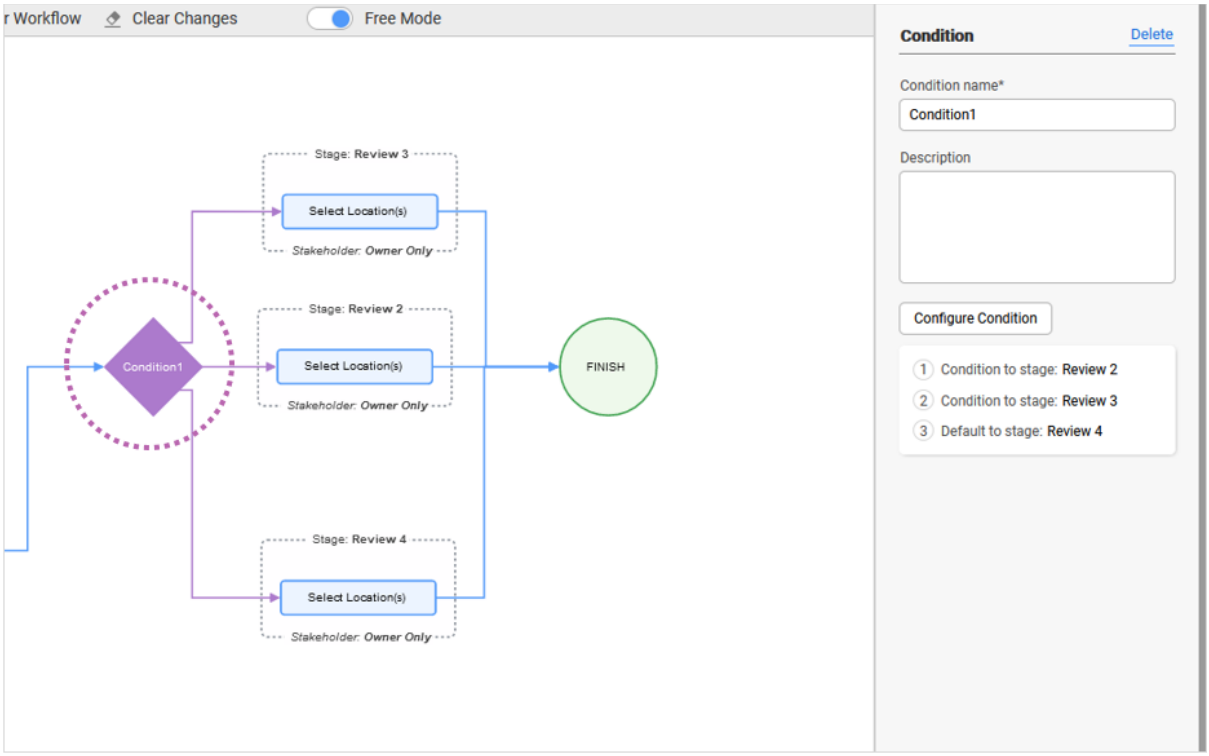
The Graphical Editor cannot be closed if some conditions are not completely configured. A notification message will be displayed on the bottom right corner of the "Condition Constructor" page.



Conditions can be viewed from parameters panel by hovering a mouse cursor over it (no need to open the editor).



The Condition element is displayed as a rhombus on the workflow editor; all outgoing transitions are symbolised on the workflow with the colour purple.



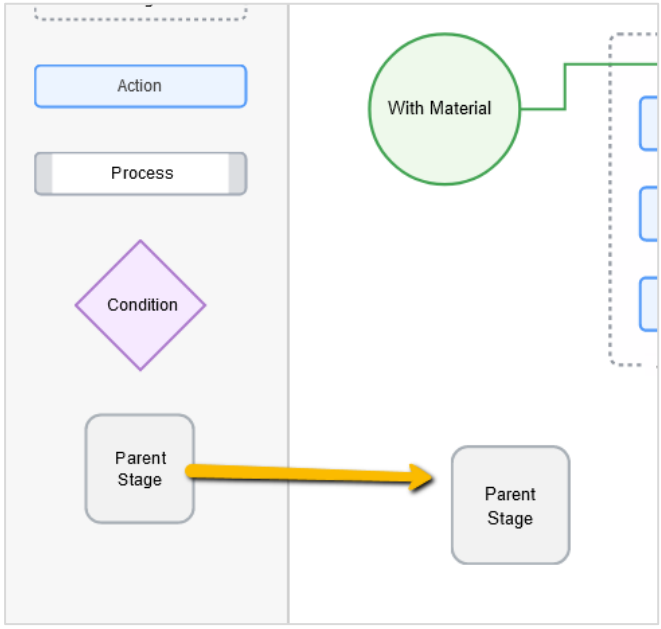
5.0 Parent/Child Stages

The **Parent stage** is a specific stage that doesn't contain any actions or stakeholders, but has "child" stages. It's logical construction for workflow which allows stakeholders to send requests to several stages for parallel review (for example, several departments). The approval request cannot be rejected or approved from this stage.

Child stages are specific stage with actions and stakeholders. The difference to a regular stage is:

1. The link to a Parent stage
2. Requests **cannot** be rejected or approved in this stage
3. Requests can leave the Child stage only by transition
4. The stakeholder of a Child stage must make a decision "**Recommend**" or "**Not Recommend**" by using the buttons available on top layer of the user interface to complete the review.

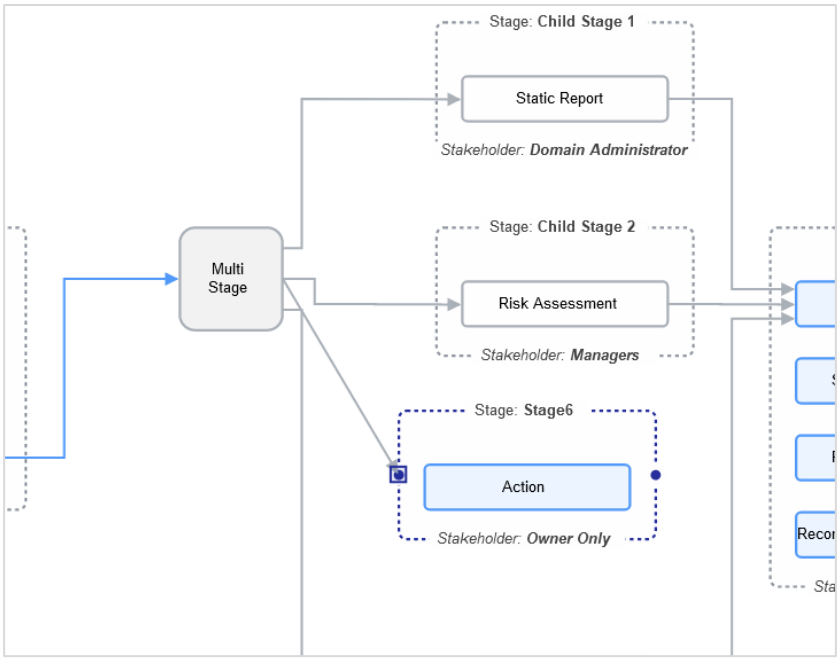
The Parent stage can be added to the visual workflow by dragging & dropping an element from the palette (from the left side menu).



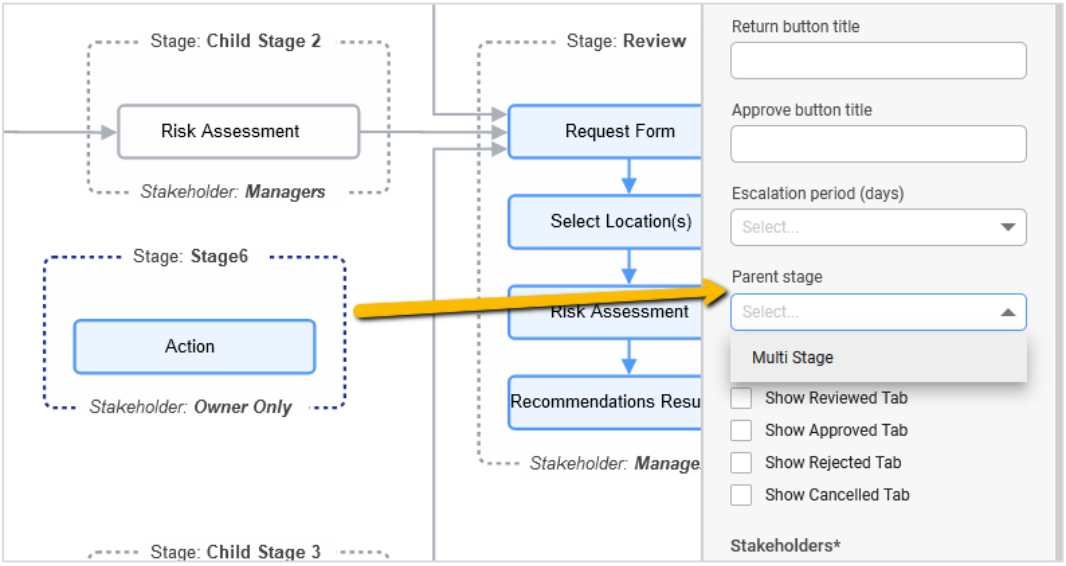
The Parent stage has a specific option besides the name and description, "**Stage bypass is allowed**". If this option is checked, then requests on Child stages will be bypassed if stakeholders don't have read-write permissions to selected folders.

How do you add Child stages into the Parent stage? There are two possible ways:

1. Manually create a transition from the Parent stage to the stage you want make a Child Stage



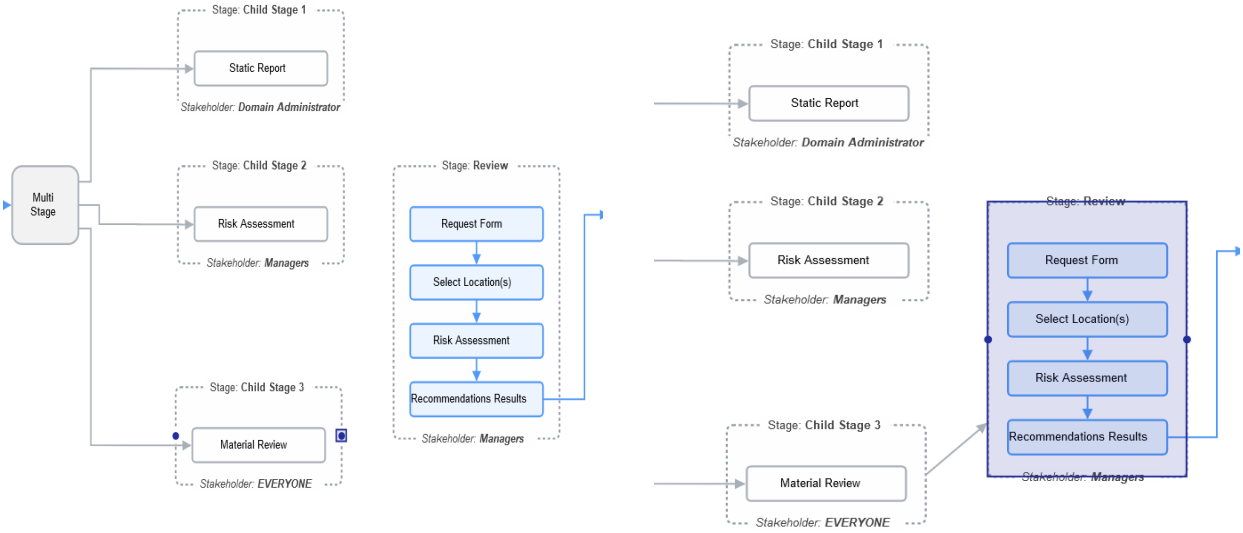
2. Select a regular stage (that you want to make a Child Stage) and change the option into a “Parent Stage”:



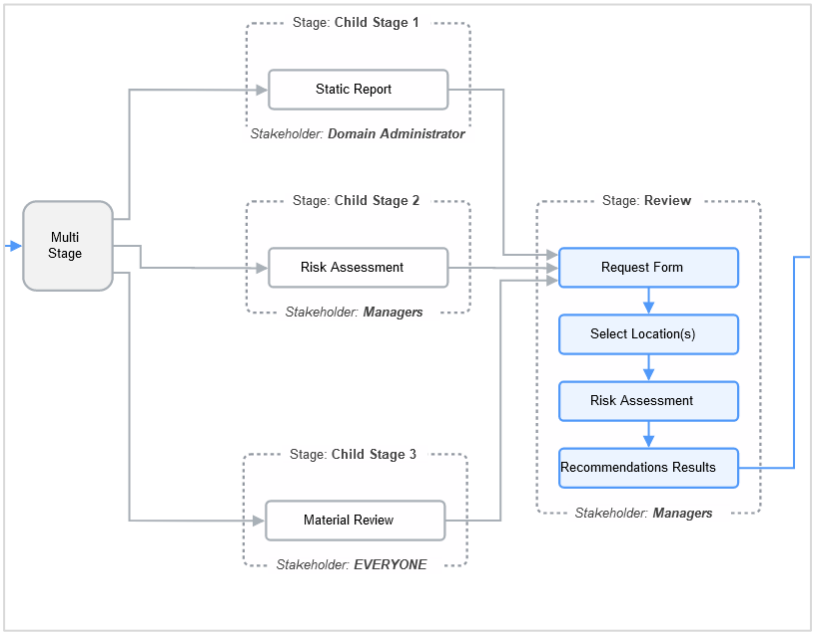
How to create a transition from Parent Stage to the next stage of the workflow (non-parallel / non-Child stage)?

Users can create a transition from any Child Stage to the next regular stage. As bunch Parent-Child stages can have only one outgoing transition, the graphical editor will add all necessary transitions automatically:

1. Choose a child stage and create a transition from it, as seen in the image below.



2. After that, all transitions will be added and rendered automatically.

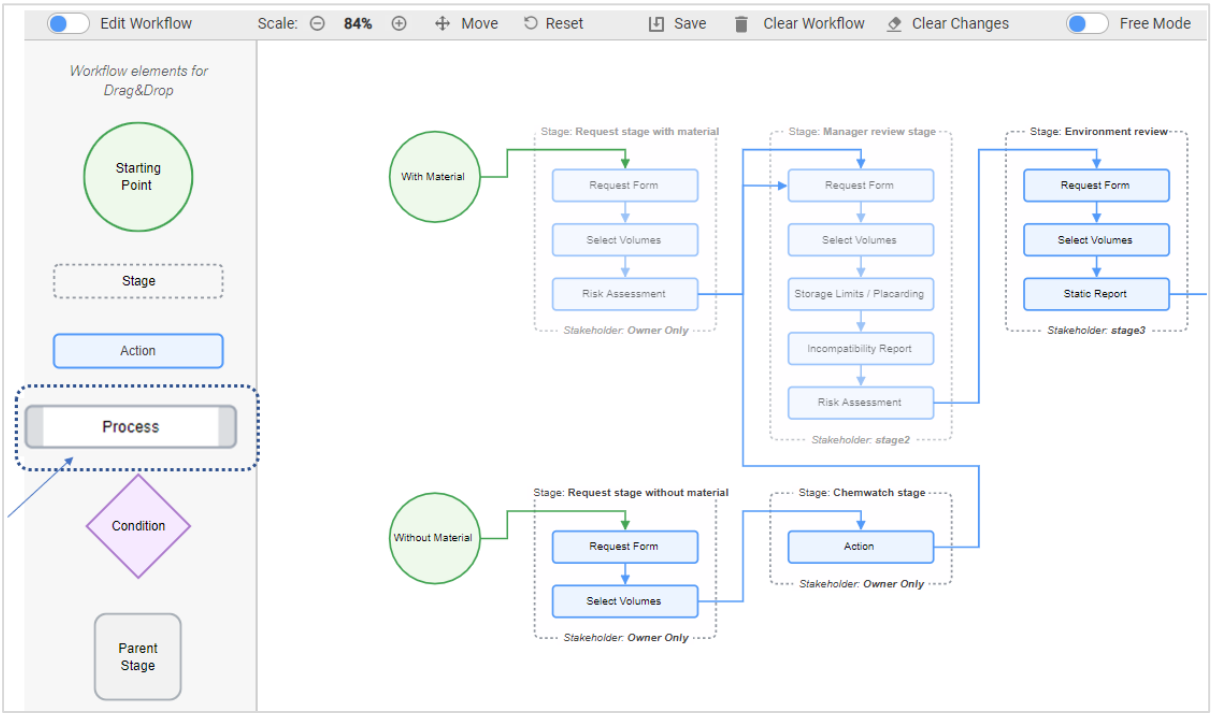


The result of any child stage is a decision: “Recommend” or “Not recommend”. The final result of a Parent/Child Stage can be reviewed during the next stage with the action “Recommendations Results” (see screen above, the last step on Review stage). The results will be displayed as a table with every child stage, related decisions and comments.

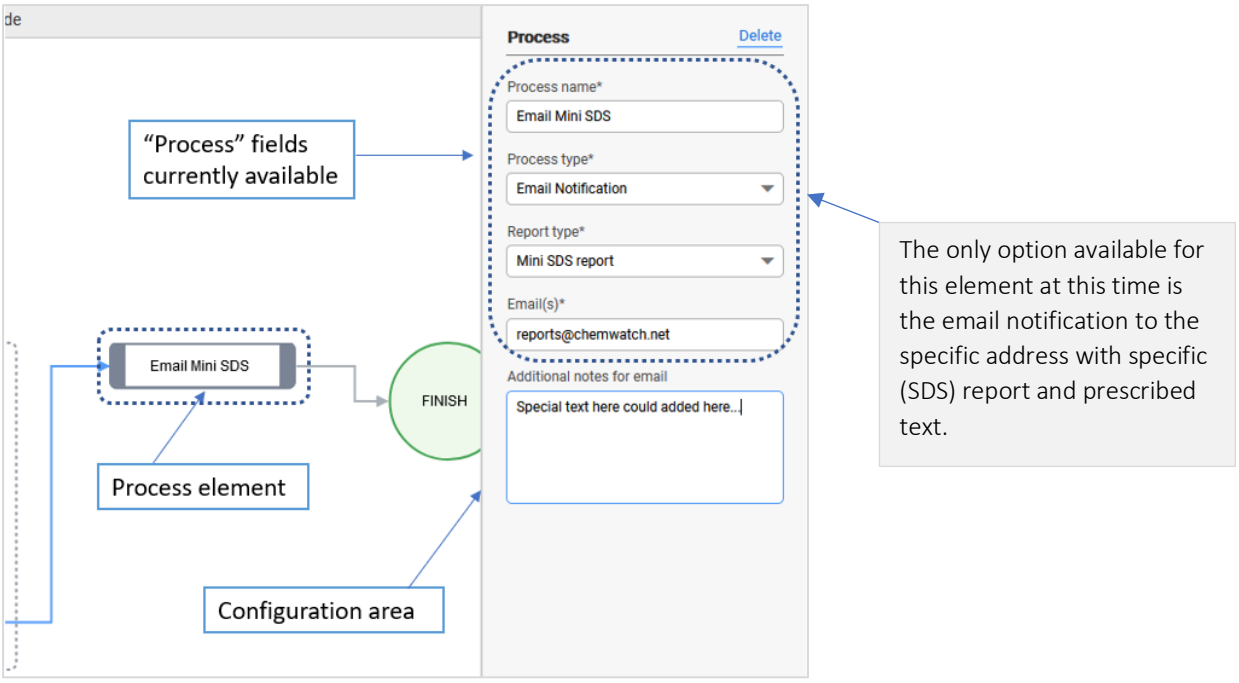
STAGE NAME	USERNAME	DECISION	COMMENT
Child Stage 2	Administrator	Recommended	It's OK!
Child Stage 3	Administrator	Not Recommended	Custom comments are allowed.
Child Stage 1	Administrator	Recommended	Let's approve this request.

6.0 Process Element

The Process element is a new element of the workflow which doesn't require involving users (stakeholders) into the action. This element is an equivalent of Action without Stage and stakeholders.



Adding a Process element is performed by dragging and dropping the respective element from Palette to the working area. Therewith, the element becomes active, i.e., the menu is displayed on the right for (initial) configuration of the element.



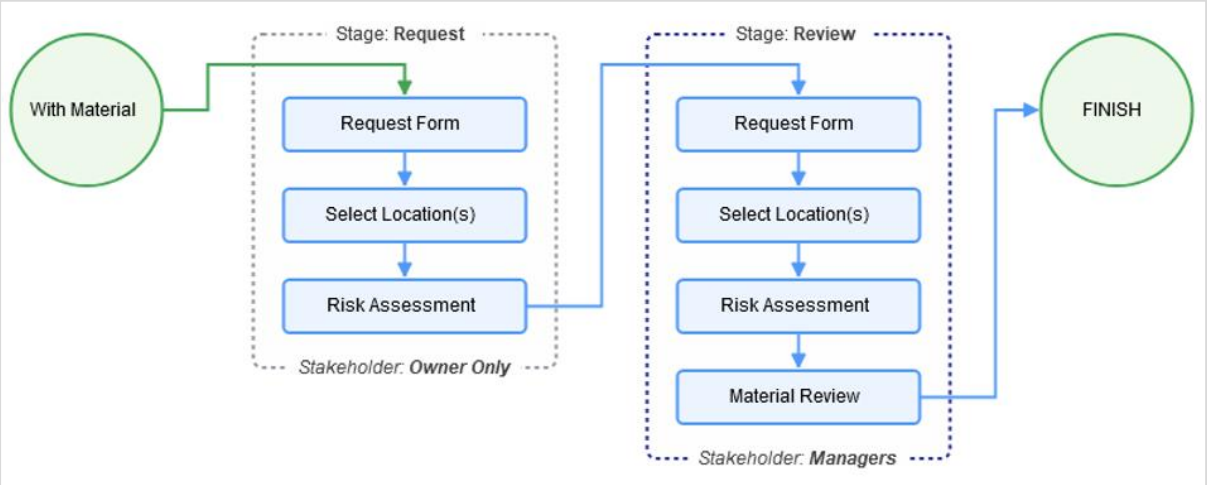
The following reports that can be processed (via email) are listed below.

There is capability to send notifications to several email addresses (by use of semicolon in the email address field). "Additional notes for email" field contains static text that is included in each sent email notification.

Take note that only one type of report can be set per element.

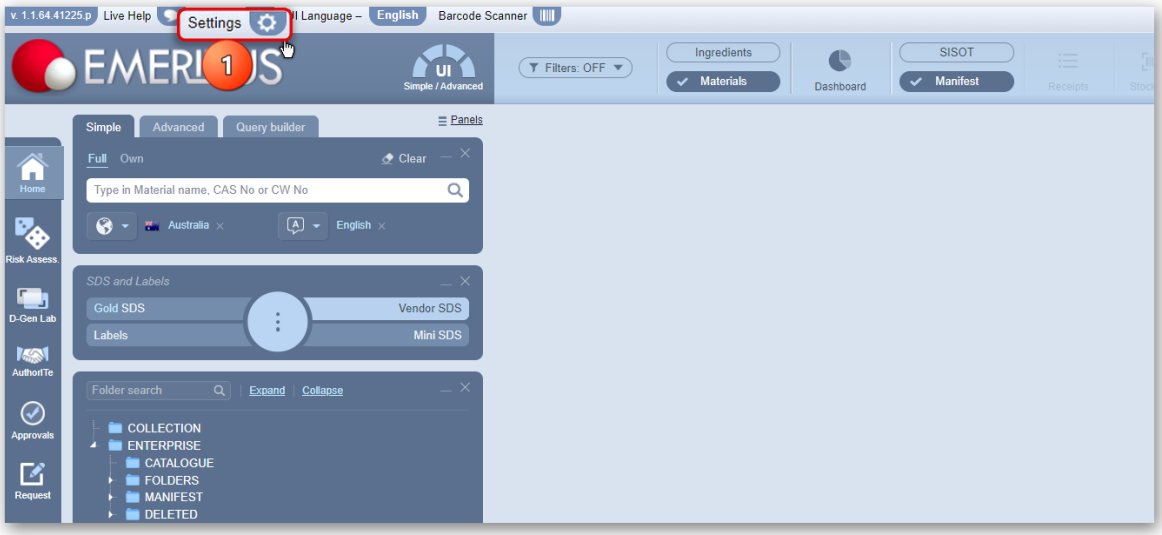
7.0 Create a Basic Workflow

The diagram below illustrates how to create a simple workflow from starting point to finish point, based on following basic workflow containing the following components.

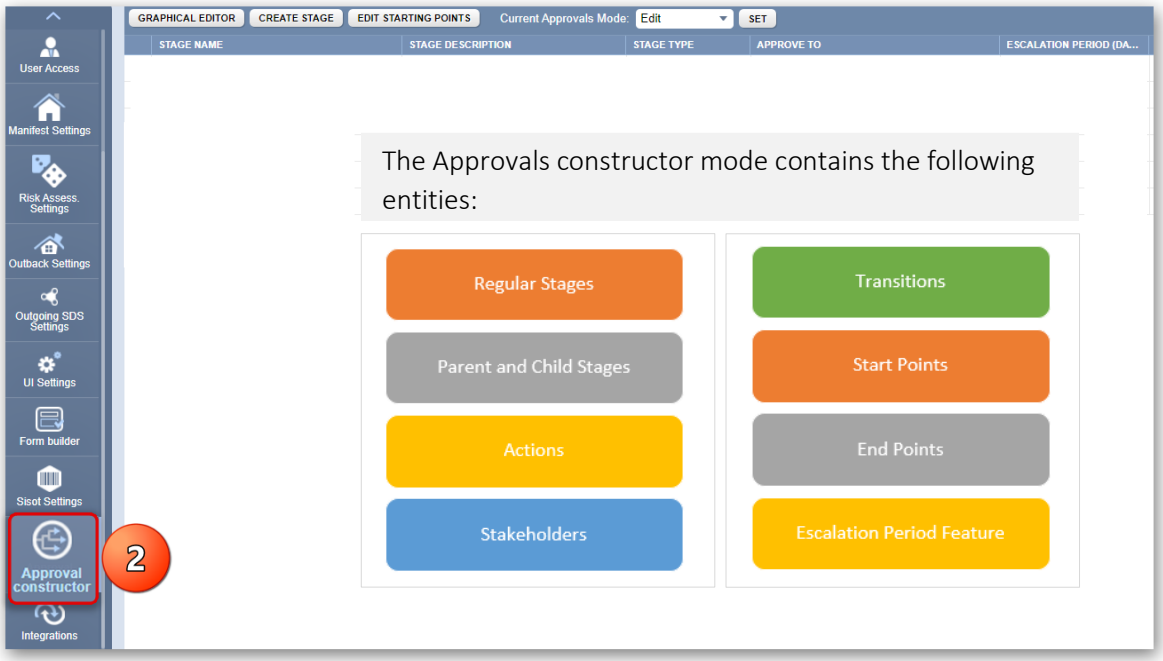


Steps: Creating a Simple Workflow from Start to Finish Stages

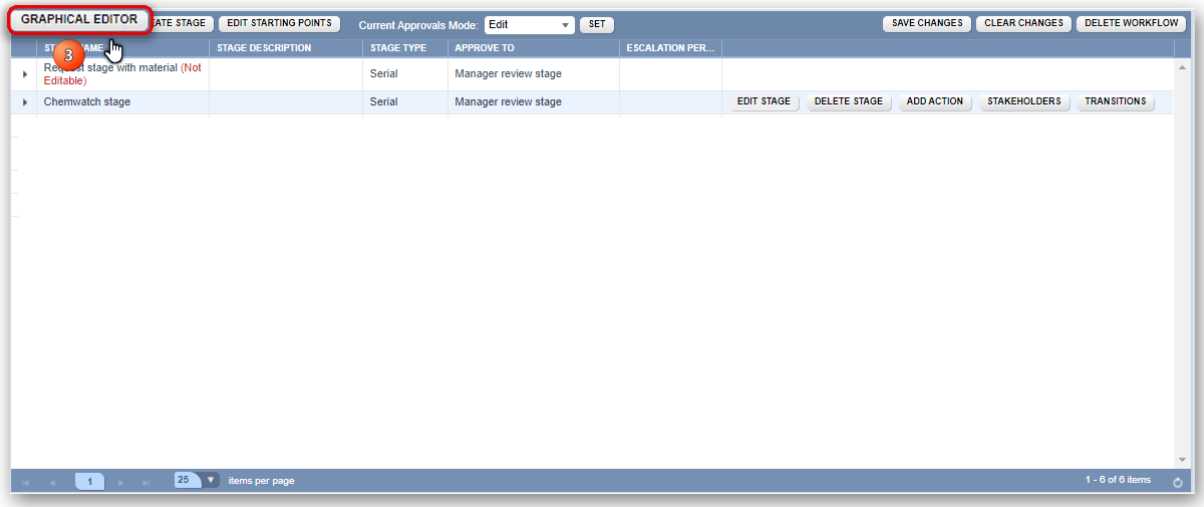
1. Click the **Settings** link or icon  from the top left toolbar of the user interface to open the settings module.



2. Click the **Approvals constructor** button on the far-left pane of the user interface.

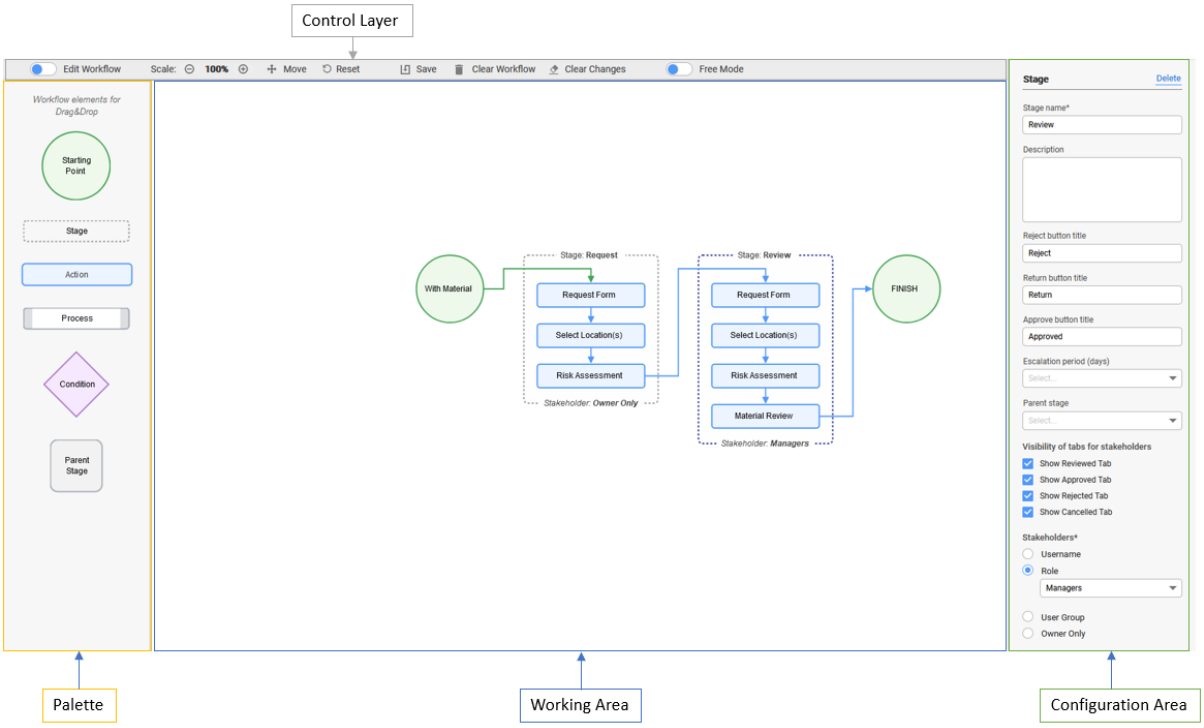


3. Click the **Graphical Editor** button on the header of the Approvals Constructor landing window



The Approvals Graphical Editor landing window is displayed. The Approvals Graphical Editor comprises of the following main user interface layers with specific components:

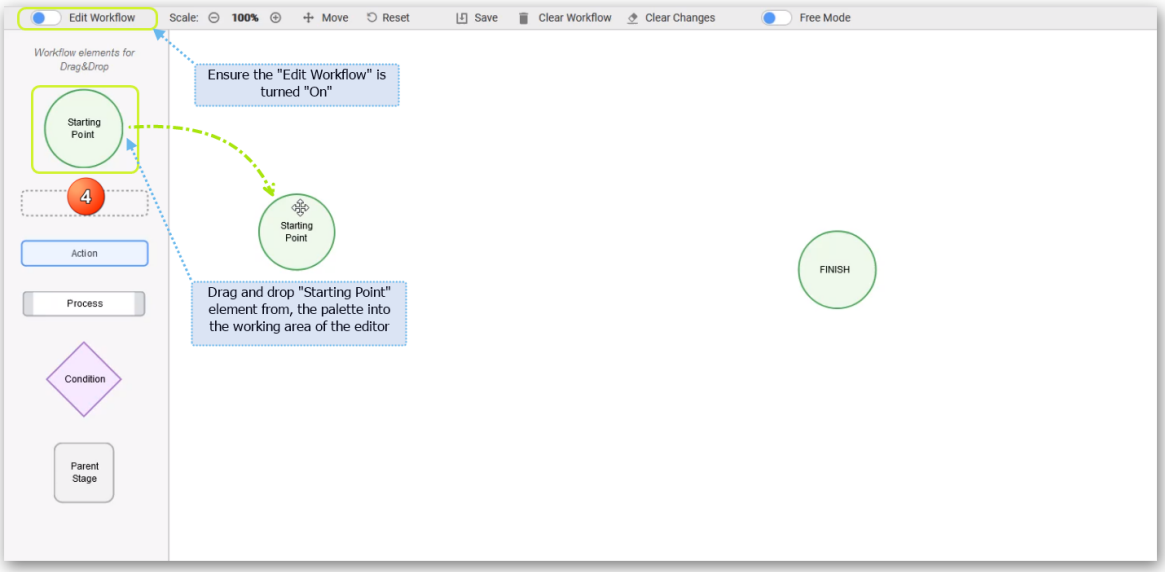
- The Control Area
- The Palette
- The Working Area
- The Configuration Area



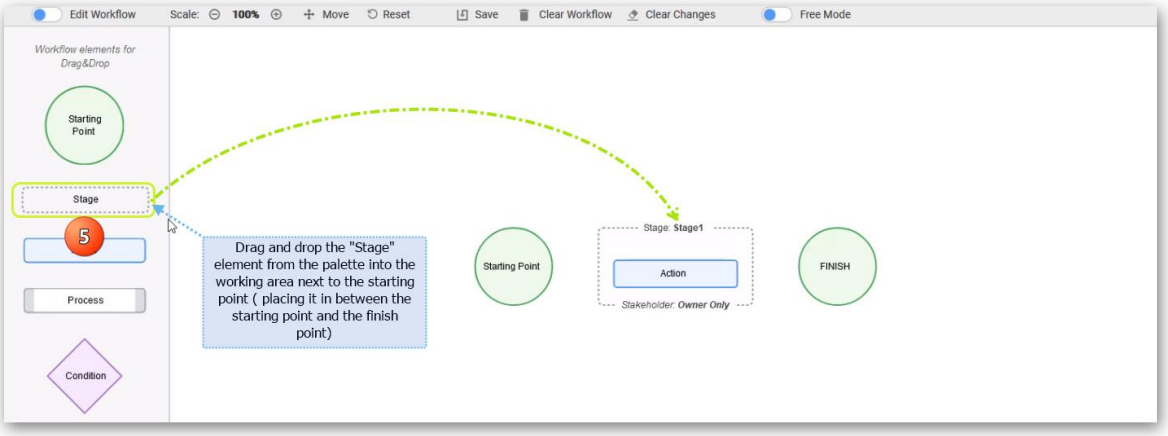
Note that the current status of the workflow is in Edit mode 

.

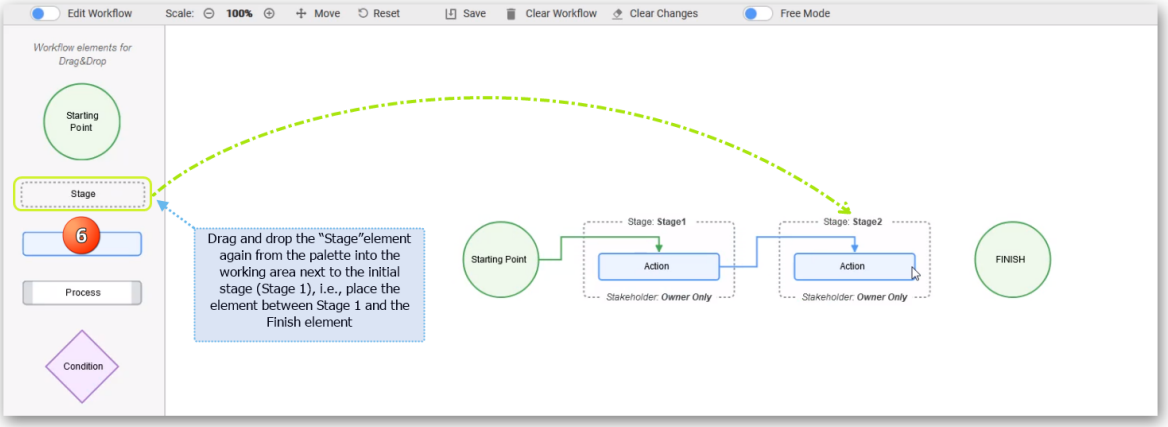
4. **Drag and drop** the "**Starting Point**" element from the palette into the working area.



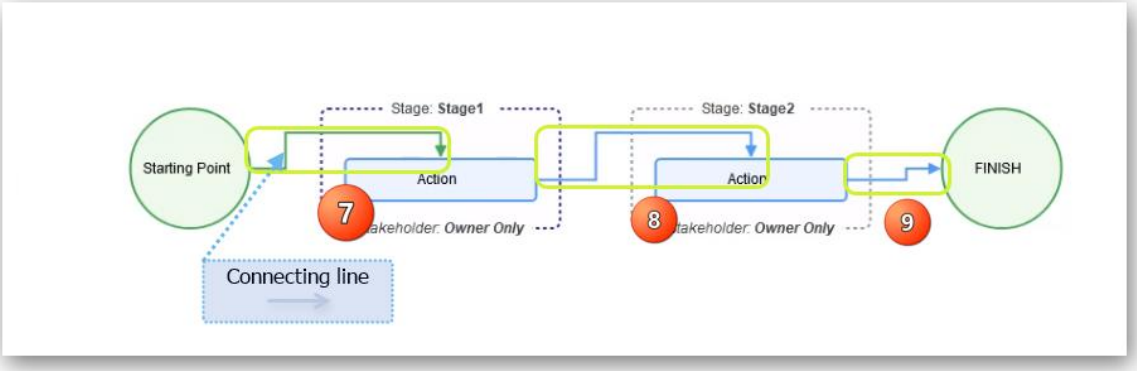
5. **Drag and drop** the "**Stage**"element from the palette into the working area.



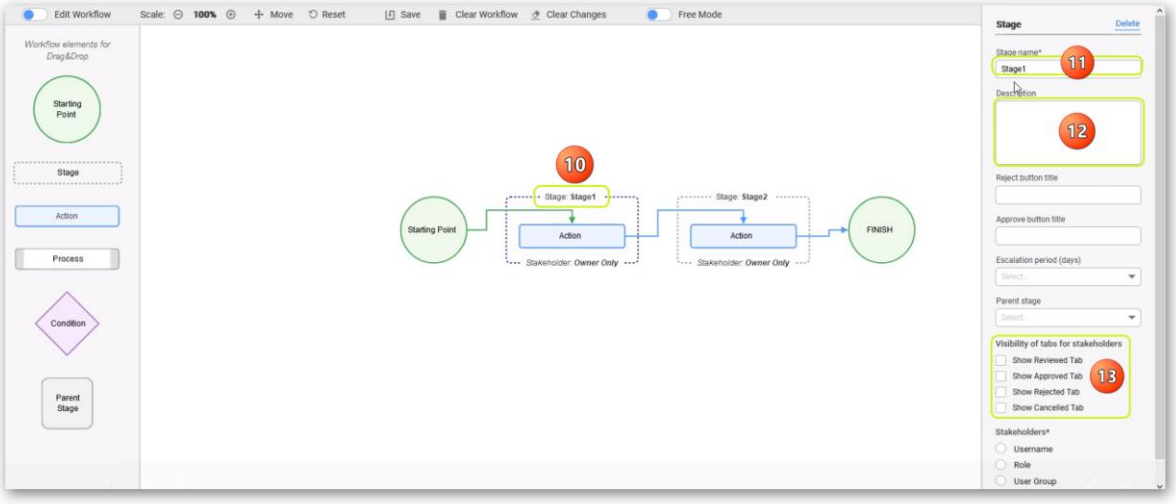
6. Again, **drag and drop** the "**Stage**"element from the palette into the working area next to the initial stage (Stage 1), i.e., place the element in between "Stage 1" and the "Finish" element.



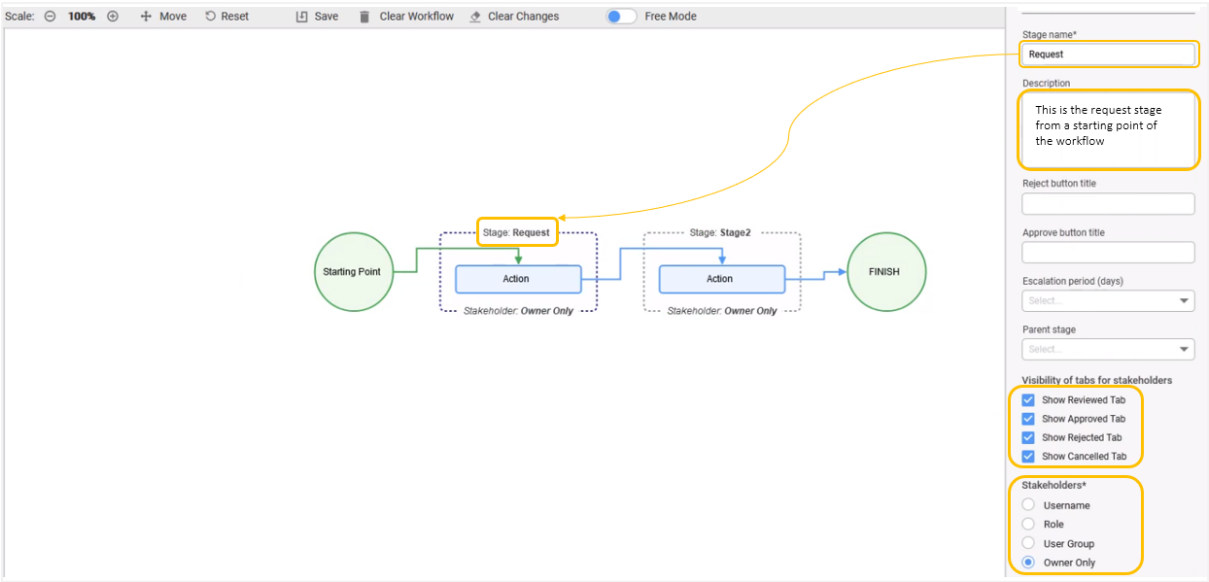
7. Connect the "**Starting Point**" to the **Stage 1 Action** component by dragging a line item from the circle to the rectangle.
8. Then connect **the Stage 1 Action** component by dragging a line item to the **Stage 2 Action.**
9. Finally, connect **the Stage 2 Action** component by dragging a line item to the "**Finish**" element".



10. **Select** the "**Stage 1**" component from the workflow area. Notice the parameters panel displays applicable fields on the righthand side panel of the editor's user interface (configuration area).
11. On the parameters panel, **rename the stage name**, e.g., Request.
12. **Type the description** of this stage in the description field.
13. **Select** the **visibility of tabs for stakeholders** by clicking respective checkbox(es) that will be relevant to this stage.

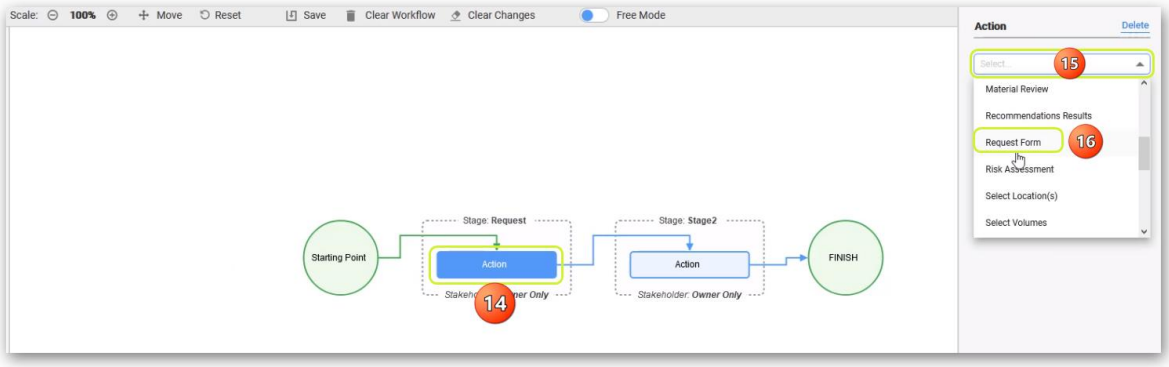


The resultant screen displays the stage name for the respective component in the working area. The Visibility section contains checkboxes to choose to show respective tab(s) for the current stage. The stakeholder is default to "Owner Only" for Stage 1: Request.

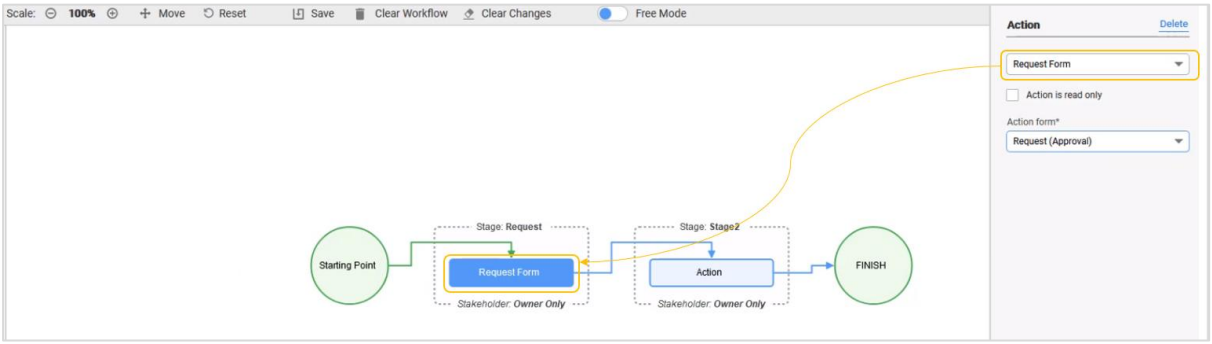


14. Select the "**Action**" component of Stage 1 from the workflow area and notice the parameters panel displays applicable "Action" fields on the righthand side panel of the editor's user interface (Configuration area).

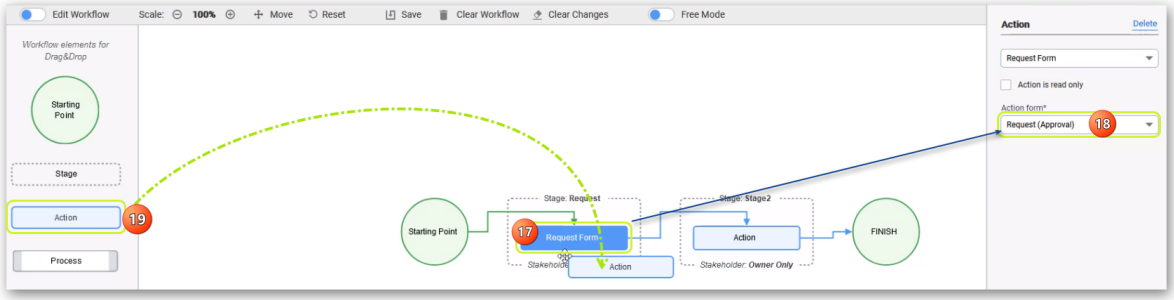
15. Click the **Action field's drop-down arrow** to choose the appropriate action item from the list of action items.
16. Click on the desired **action item** from the list, e.g., Request Form.



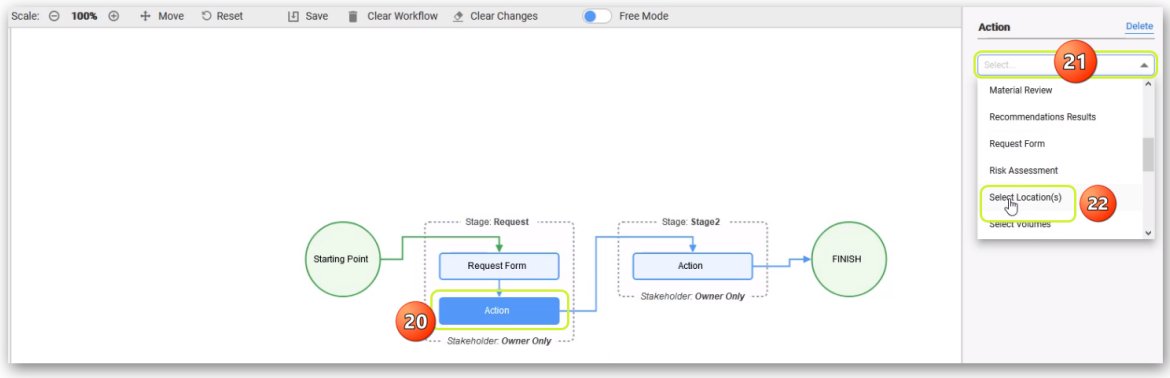
The resultant screen will display the respective changes of the component in the working area.



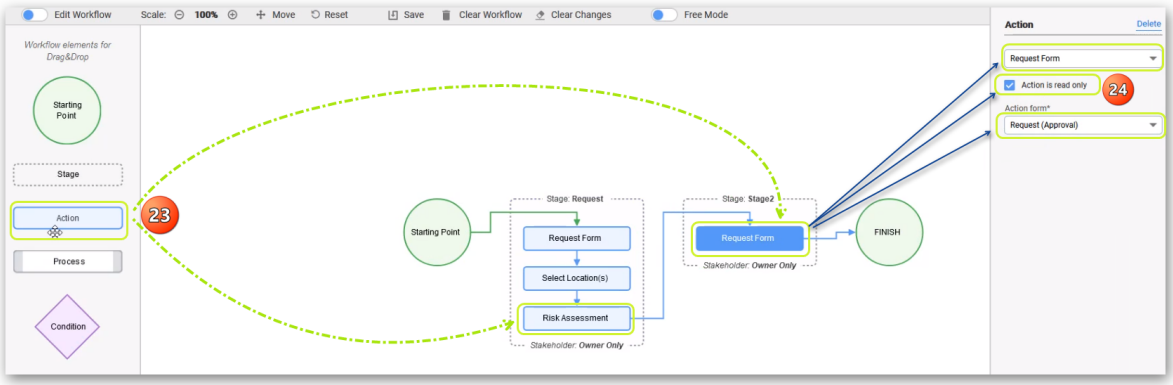
17. Select the **Request Form** component in Stage 1 of the working area.
18. Click on the "**Action form**" field to assign the rule required, e.g., Request (Approval).
19. **Drag and drop** another **"Action" element** from the palette into "Stage: Request" to add a second action to this stage.



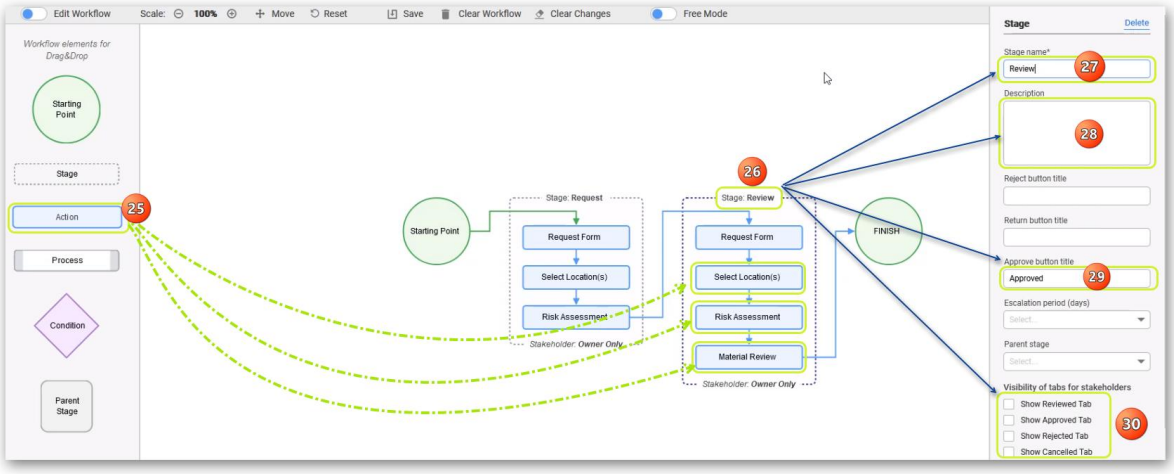
20. Select the "**Action**" component of this Stage: Request from the workflow area and notice the parameters panel displays applicable "Action" fields on the righthand side panel of the editor's user interface (Configuration area).
21. Click the **Action field's drop-down arrow** to choose the appropriate action item from the list of action items.
22. Click on the desired **action item** from the list, e.g., Select Location(s).



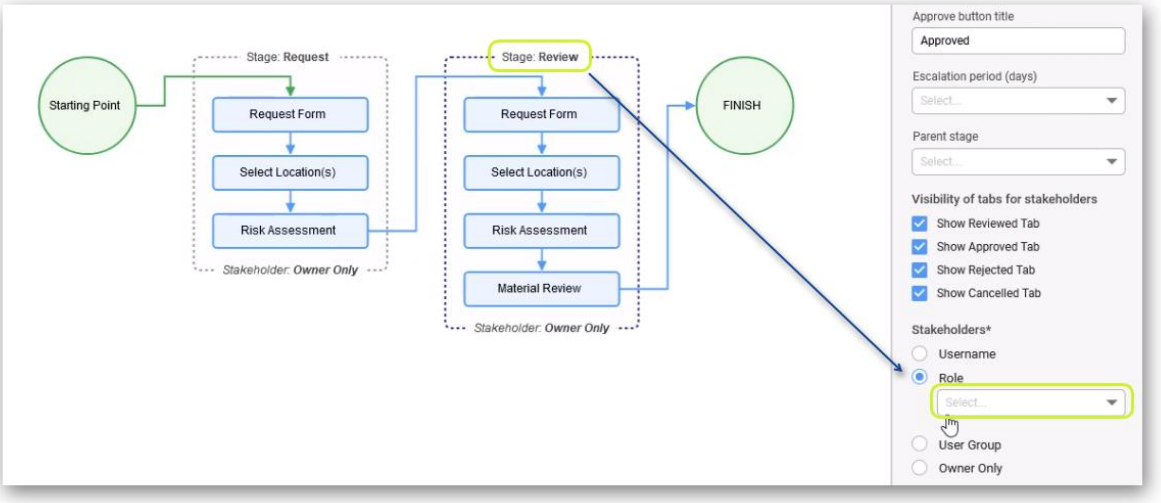
23. Continue the process of **adding "Action" items** by dragging and dropping the "Action" element into the respective stages in the work area, e.g., in Stage: Request, add "**Risk Assessment**", go the Stage 2 and add "Action" item "**Request Form**".
24. Assign Action as "**Read only**" for the Stage 2 "Request Form". Confirm that the "**Action Form**" is set as "Request (Approval)" as a rule set in previous activity for the "Request Form".



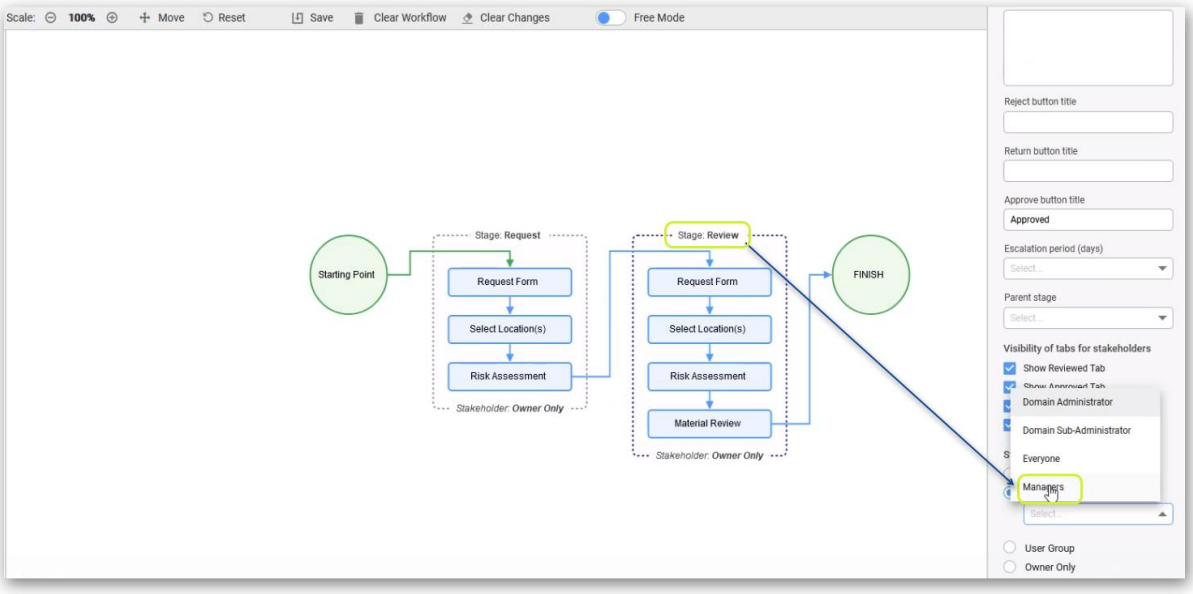
25. Continue the process of **adding "Action" items** in Stage 2 by dragging and dropping the "Action" element into the work area, e.g., add "Action" items "**Select Location(s)", "Risk Assessment", "Material Review".**
26. Select the **"Stage 2**" component in the working area.
27. **Rename the stage** name in the righthand side parameters panel.
28. **Type a description** for this stage.
29. Select the **"Approve button title**" field to apply it to this stage.
30. Select the respective **checkboxes** for the **"Visibility of tabs for stakeholders".**



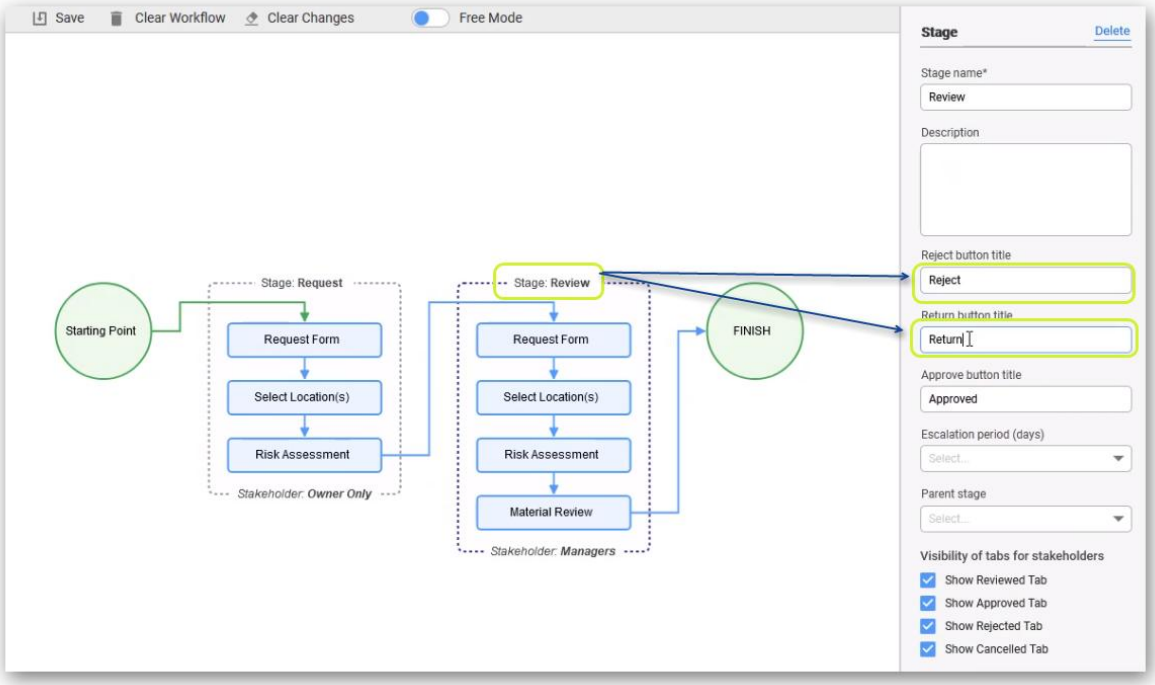
31. **Scroll down the parameters panel** using the right handside vertical scrollbar and **select** the "**Role**" radio button from "Stakeholders" in the parameters panel.



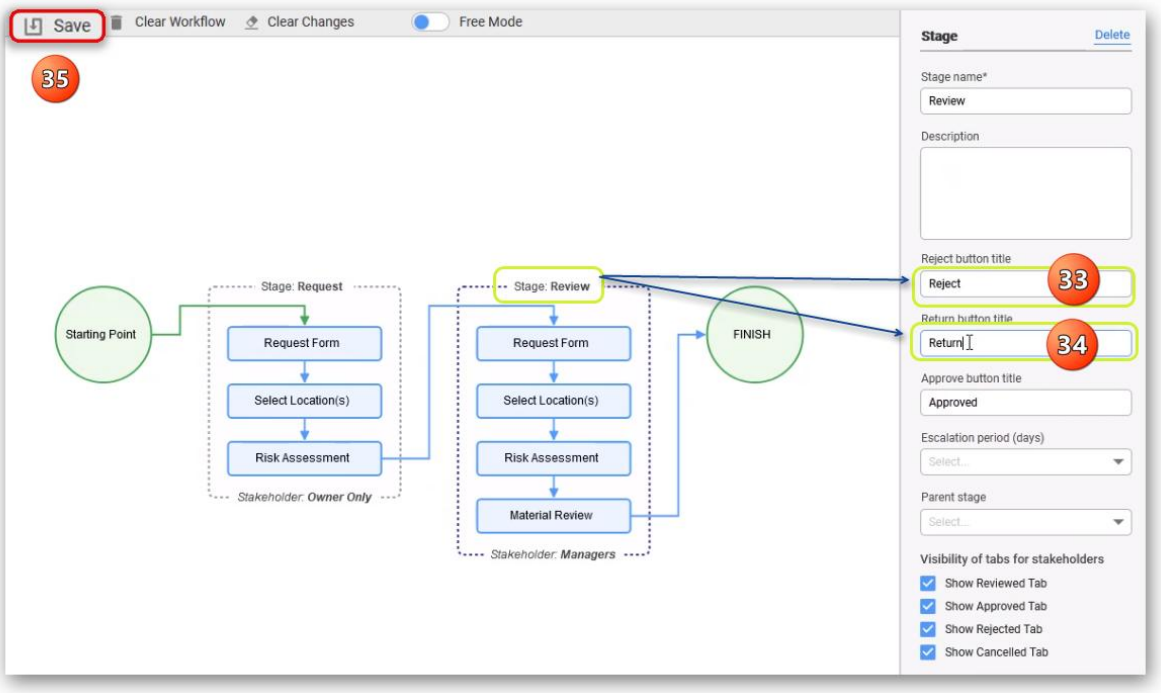
32. Click on the **Role Name** from the drop-down list to assign it to this stage, e.g., **Managers.**



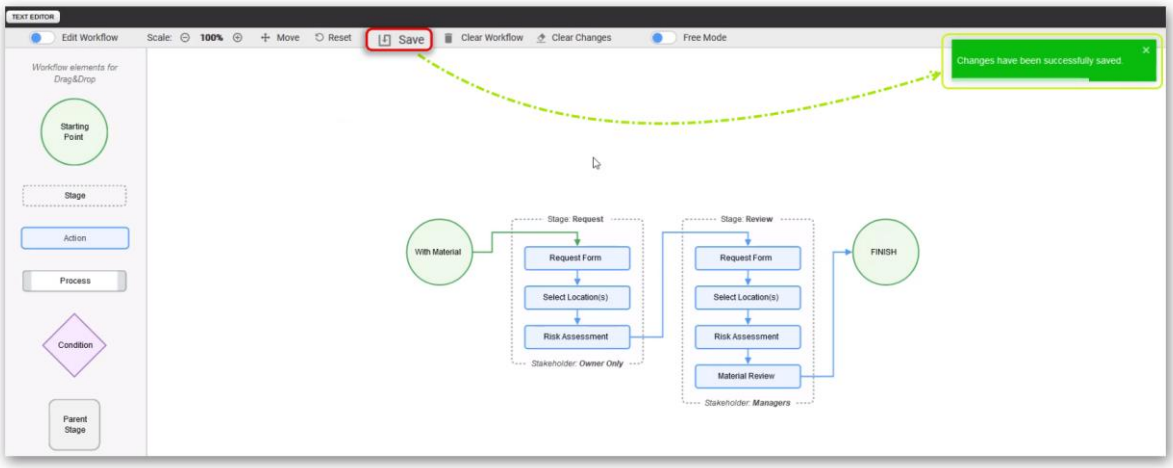
33. Scroll up the parameters panel to the "**Reject button title**" and type the respective title to be displayed in this stage, e.g., "**Reject**".
34. **Type** the **"Return button title"** in the respective field.



35. Press the "**Save**" button Save from top left section of the toolbar.

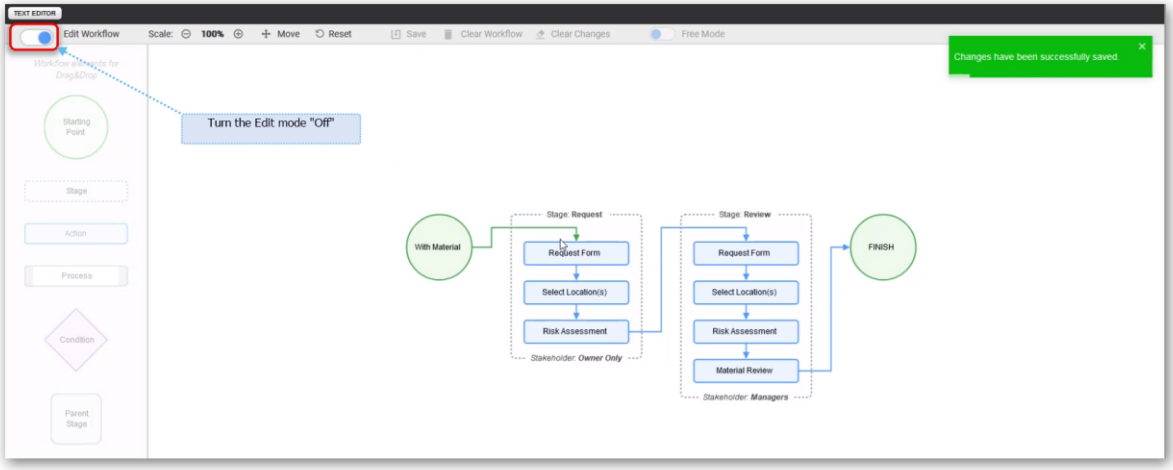


36. The Approvals **Graphical Editor** should display a notification that the changes made have been successfully saved!



37. Click the "**Edit Workflow**" switch 

on the top left corner of the control area's Edit mode to turn the mode "**Off**".



8.0 A Recap on System's Approval Settings

The Chemwatch system's home page provides the Administrator Settings and General Settings.

Filter Settings
Global filters and tag settings on how the application will display data.

SDS Settings
SDS administrative display settings for Gold SDS. Set up SDS display information, including format and jurisdiction.

SDS Request
Request Form for SDS to be written and reviewed by Chemwatch.

User Access
Set up users, groups, roles, folder permissions, privileges, user interface filters, products and authentication settings.

Manifest Settings
Set up placard volume limit rules, manifest volume limit rules, international fire code (IFC) thresholds or national fire protection code thresholds.

Risk Assessment Settings
Configure user-defined/custom risk assessment settings and calculation model or use the ILO default 5x5 matrix mode settings.

Outback Settings
Set up Outback settings by uploading your outback company flagship logo and assigning label templates to be accessed by your customers.

Outgoing SDS Settings
Set up SDS information to display on the SDS, including logo and preferred vendor.

UI Settings
Set up the user interface display components/features and behaviors of the user interface.

Form Builder Settings
Create forms and associate fancy fields, datapoints, labels and user fields required to be filled.

Sisot Settings
Set up SiSoT barcode generation rules, approval rules, stocktake settings, an address book, cost codes, container owner rights, container export reporting sequence, waste container expiry web links and waste status.

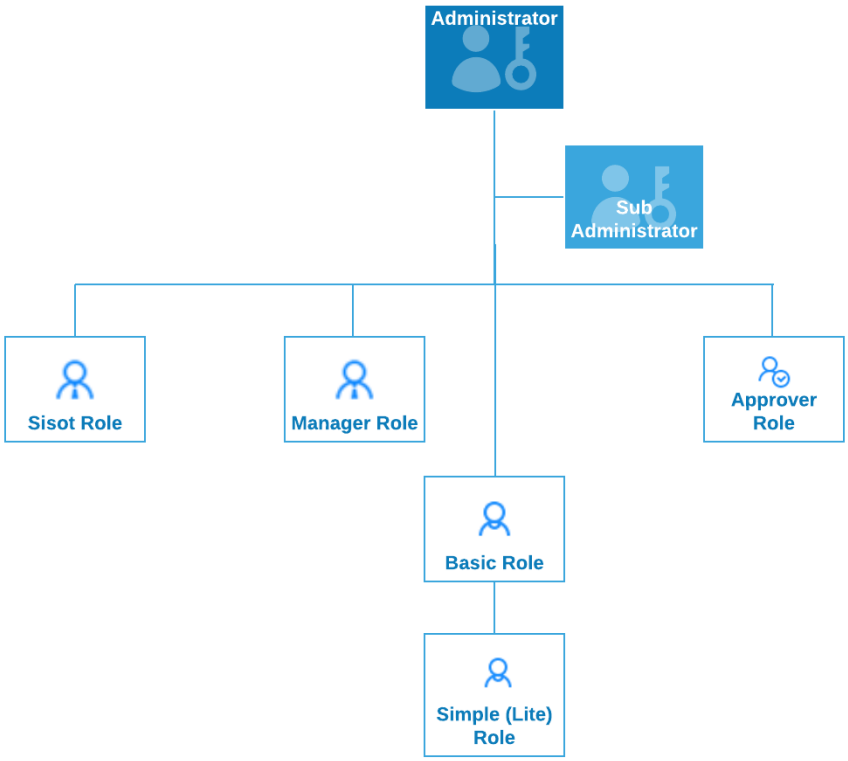
Approval Constructor Settings
Configure the approvals module by creating an approvals workflow, stages, action points, assign stakeholders and set up stage transitions.

Integrations Settings
App integration will be configured by sending a request to Chemwatch Development Team for approval.

The **User Access** and **Approval Constructor settings** play a pivotal role when creating users and assignment of respective Approvals related roles, privileges, folder permissions (where applicable), and many more.

Generally, the administrator is the main domain user responsible for managing system access for other users. The types of user profiles can range from basic users with read-only access, users with edit rights and sub-administrator users with some level of control of the systems settings. Note that the following settings need to be taken into account prior to setting up the Approvals Workflow to ensure that the alignment of users and stakeholders in the Approvals Workflow.

- Creating users
- Creating groups
- Creating roles
- Assignment of folder permissions
- Assignment of privileges
- Assignment of Global filter settings
- Assignment of User Interface settings,
- Assignment of Products (modules)
- Setting Authentication mode



Function	User Profile	System Access	Permission
Domain Administrative role	Primary Administrator (ADM) of the system	Entire access to the system	Full access with read-write permission to the entire system and the ability to set up users and respective privileges, products and user access management.
Sub-Domain Administrative role	Secondary Domain Administrator (SDM) of the system	Entire access to the system with limited user access features	Full access with read-write permission to the entire system and the ability to set up users and assign roles, privileges, and products as prescribed by the administrator.
Management user role	Manifest Management level	Management of specific areas of the system's manifest	Ability to edit materials (with read-write permission); access assigned role permissions; manage data; access the report generator and dashboards; document filter tools, conduct risk assessments and much more.
Basic user role	General use level	General use may have limited access and read function	Ability to read data, search for materials, view various accessible reports as per the set privileges by the domain administrator.
SiSoT module user role	SiSoT module role	This role is applicable to domains that are licensed to the SiSoT module	The SiSoT module user is required to have a number of SiSoT related privileges and folder permissions in order to perform SiSoT-related tasks. Refer to the privileges section of this guide for more details.
Approvals module user role	Users that are assigned to a stage	Requester	A requester is set to request for material to be approved; this is a stage 1 process of the Approval Workflow
		Stage Approver in the workflow	Stage approver follows any stage 1 requests until the workflow cycle is complete and the requests have been approved.

A user management profile begins with defining access profiles for various types of users based on organisational roles or functions. The flow chart below provides a recommended strategic approach in creating users, groups, roles, and the assignment of privileges, filters, user interface settings, products and activating the authentication mode.

The user access settings module is strictly accessible by the administrator only for security purposes. The primary objective of the administrator is to set up the system, and to add users, including the sub-administrator (where applicable). The administrator can follow the recommended 10 step approach in setting up the system as depicted in the chart below.

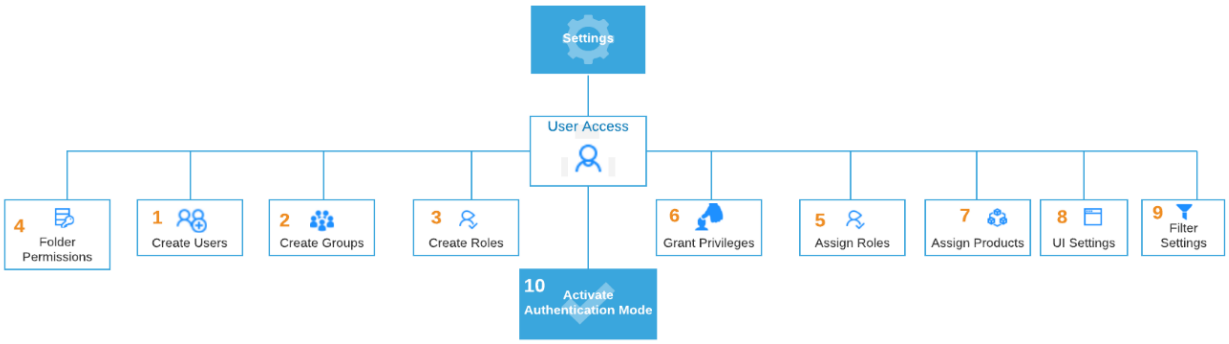


Chart flow summary descriptions

The following table provides summary descriptions based on the recommended flow chart above.

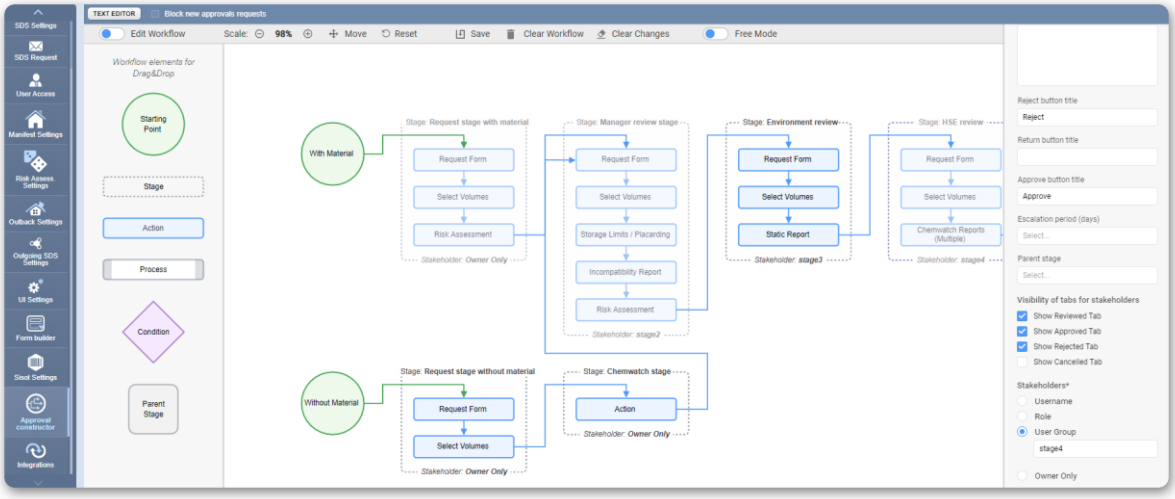
Chart flow item No.	User Access setting tab	Summary Description
1.	Create Users	Create the various types of users, e.g., Simple/basic, managers, SiSoT, approvers, etc.
2.	Create Groups	Create the various types of groups; e.g., general, managers, SiSoT, approvers, etc., and assign users to groups. Working with groups helps minimise a backlog when assigning each user to multiple privileges.
3.	Create Roles	Create the various types of roles, e.g., Site managers, Approvals Stage Approver, Risk Assessors, Approvals Requester, Managers, etc. Working with roles helps minimize a backlog when assigning each user multiple privileges.
4.	Set Folder Permissions	Assign users or groups to specific folders, e.g., Sites, Areas, Sections, Locations, and Stores, by granting the applicable type of folder permission: Read, Read-write, Deny or Not Defined.
5.	Assign Roles	Assign roles to users or groups (assuming that you have assigned users to the specific groups), e.g., Approvals Groups —Stage 1, Stage 2, etc.
6.	Grant Privileges	Assign specific privileges directly to users or groups or via a role.
7.	Assign Products	Assign products (modules) to users or groups.
8.	Set UI Settings	Set the user interface attributes to suit various types of users.
9.	Set Filter Settings	Set the filter settings “attributes” to suit various types of users.

8.1 Approvals Related Privileges

The following privileges are important when granting them to users or groups directly or via a role.

Access to Approval Constructor ☐

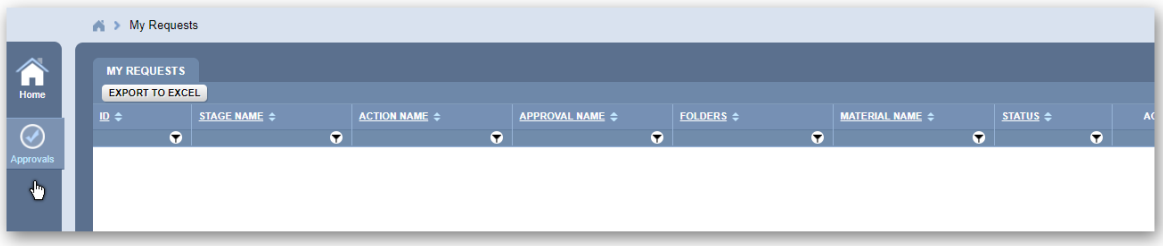
When granted, this privilege will allow users to access the Settings link in the Settings Approvals Constructor section. It provides access to set up and manage an approvals module workflow, create stakeholders, stages and assign approvals attributes such stage approver.

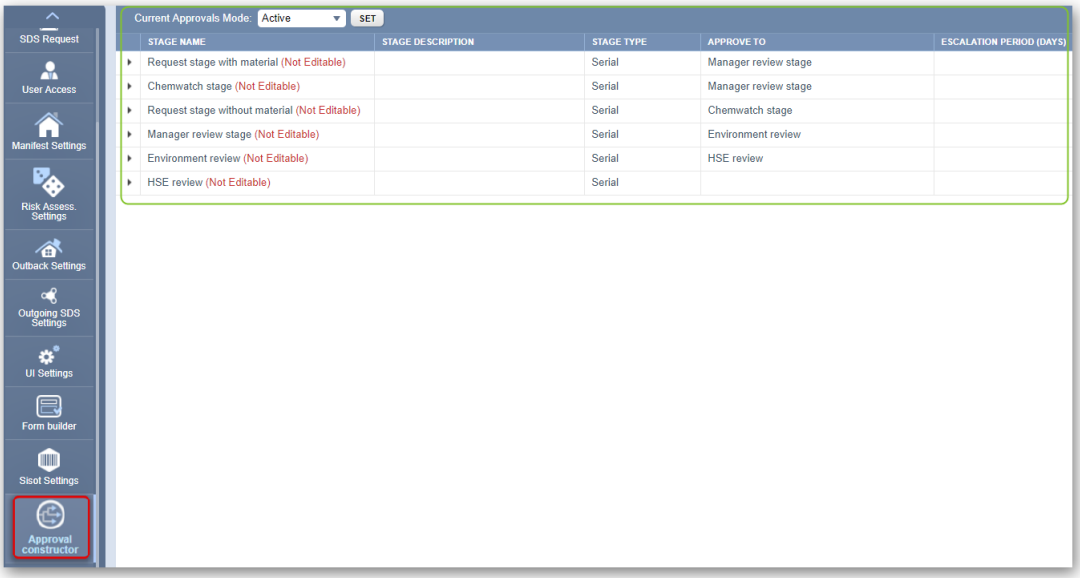


ⓘ The Approval Constructor Settings are applicable to the administrator or sub-administrator to create/edit the Approvals' Module Workflow. *Do not assign this mode to any other user, unless otherwise advised.*

Access to Approvals ☐

This privilege provides user(s) with access to the Approvals module to be able view or track the status of their particular requests.





Approval Administrator ☐

This privilege provides access to users who have been given the role of an Approval Administrator for the Approvals Module. More details are covered in the Administrators Settings Manual for the package with Approvals Module. Contact helpdesk@chemwatch.net for more information.

IT'S NOT THE HAZARD
IT'S THE RISK!

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