Catalis Meeting Management – Workflows
(Admin View)

Video
https://vimeo.com/1201437492/e4c86dec0f

Description

This Standard Operating Procedure (SOP) explains how administrators in Catalis Meeting Management configure workflows, assign users, manage item submissions, and complete the approval process for agenda items. Workflows control how items are submitted, reviewed, approved, and added to meeting agendas.

Procedure

1. Enabling Workflows

- Contact Catalis Support to enable workflows for your environment
- Support can also assist with creating custom workflows if required

Once enabled:

- Workflows become available for agenda item submission and approval

2. Assigning Users to Workflow Groups

To assign workflow responsibilities:

- Navigate to Administrator View
- Go to Menu → Accounts
- Select a user and click Edit
- Scroll to Groups

Assign the user to appropriate workflow groups, such as:

- Workflow Administrators
- Workflow Request Reviewers
- Department-specific groups (e.g., Finance, Legal)
- Click Update User Account to save changes

3. Linking Workflows to Agenda Categories

To enable workflows on agendas:

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- Navigate to Menu → Agendas
- Expand Options
- Select Add Category or edit an existing category
- Assign a workflow to the category
- Click Add Category

4. Creating an Agenda with a Workflow

- Create or open an agenda
- Select the category with the workflow attached
- Complete normal agenda setup
- Save the agenda

Once applied:

- Workflow submission becomes available for that agenda

5. Granting User Access to Submit Items

To allow users to submit workflow items:

- Open the agenda
- Navigate to Permissions
- Assign users or groups access to the agenda
- Click Update

Users with access can:

- View the agenda
- Submit agenda items for workflow approval

6. Submitting Agenda Items (User Process)

From the Member View:

- Open the desired meeting
- Select Submit Agenda Item

Enter required details:

- Title

- Description or notes
- Labels (e.g., Finance Review, Legal Review)

To add attachments:

- Save as a draft first
- Edit the draft
- Upload attachments
- Submit the item for approval

Submitted items will appear as Queued.

7. Reviewing Workflow Items (Administrator Process)

- Navigate to Administrator View
- Locate My Workflow Items
- Select View on the item

From the review screen:

- Review notes, labels, and history
- Click Claim to take ownership

Then:

- Select Accept to move to the next step
- Or Reject to return the item with feedback

8. Workflow Step Progression

- Items progress through workflow steps based on:
    - Assigned groups
    - Labels (e.g., finance or legal review)
- Each step must be claimed before approval
- Items may skip steps if conditions are not met

Example:

- Finance review triggered → sent to finance group
- Legal not required → skipped automatically

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9. Final Approval of Workflow Items

- At the final step:
  - Claim the item
  - Select Accept/Approve

Once completed:

- The item status becomes Approved

10. Placing Approved Items on an Agenda

Approved items are not automatically added to the agenda.

To place the item:

- Open the workflow item
- Select Place Item
- Choose where the item should appear in the agenda

You can:

- Insert at a specific position
- Drag and drop to reorder

Once placed:

- The item behaves like a standard agenda item

Important Notes

- Users must belong to the correct groups to participate in workflow steps
- Items must be claimed before approval or rejection
- Drafts are required before adding attachments to submissions
- Approved items must be manually placed on the agenda

Additional Resources

- Refer to Catalis Meeting Management training materials and administrator guides for advanced workflow configuration and approval processes.

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