ACCESSING & MODIFYING WORKFLOWS

1. Step 1: Search for a Task

1.1. Search for a task using the Frevvo User Guide.

2. Step 2: Click the Pencil Icon

2.1. Click the “pencil icon” within the task you are seeking to modify (i.e., below the date on the right-hand side). Only some personnel have authority to modify tasks, so you will likely need to speak with the Office of Sponsored Programs for assistance.

3. Step 3: Revise as Appropriate

3.1. Assign to a Different User

3.1.1. Click the radio button next to “a user,” enter the new user’s username in the “Assign to a different user” field, add a rationale to the “Reason” field and click “Submit.”

WARNING: By assigning the task to a different user/role, you are changing the intended workflow. This could have unexpected consequences!

Do not assign to a different user if you need the workflow to go to a different step! This will create havoc with the workflow!
3.2. Reset to a Different Step

3.2.1. Click the “Rest to Step” drop down box and choose to which previous step this routing needs to be returned.

! WARNING: By assigning the task to a different user/role, you are changing the intended workflow. This could have unexpected consequences!

3.2.2. Next, add a “Reason” and click “Submit.”

Only use approach to go to a previous step. Do not use this to skip forward, as it will create numerous problems with the routing.

3.3. Abort Task

3.3.1. You can abort a task (i.e., stop it without any further workflow), by checking the “Yes” button under the “Abort this task?” question. This should be a very rare occurrence.