Streamline

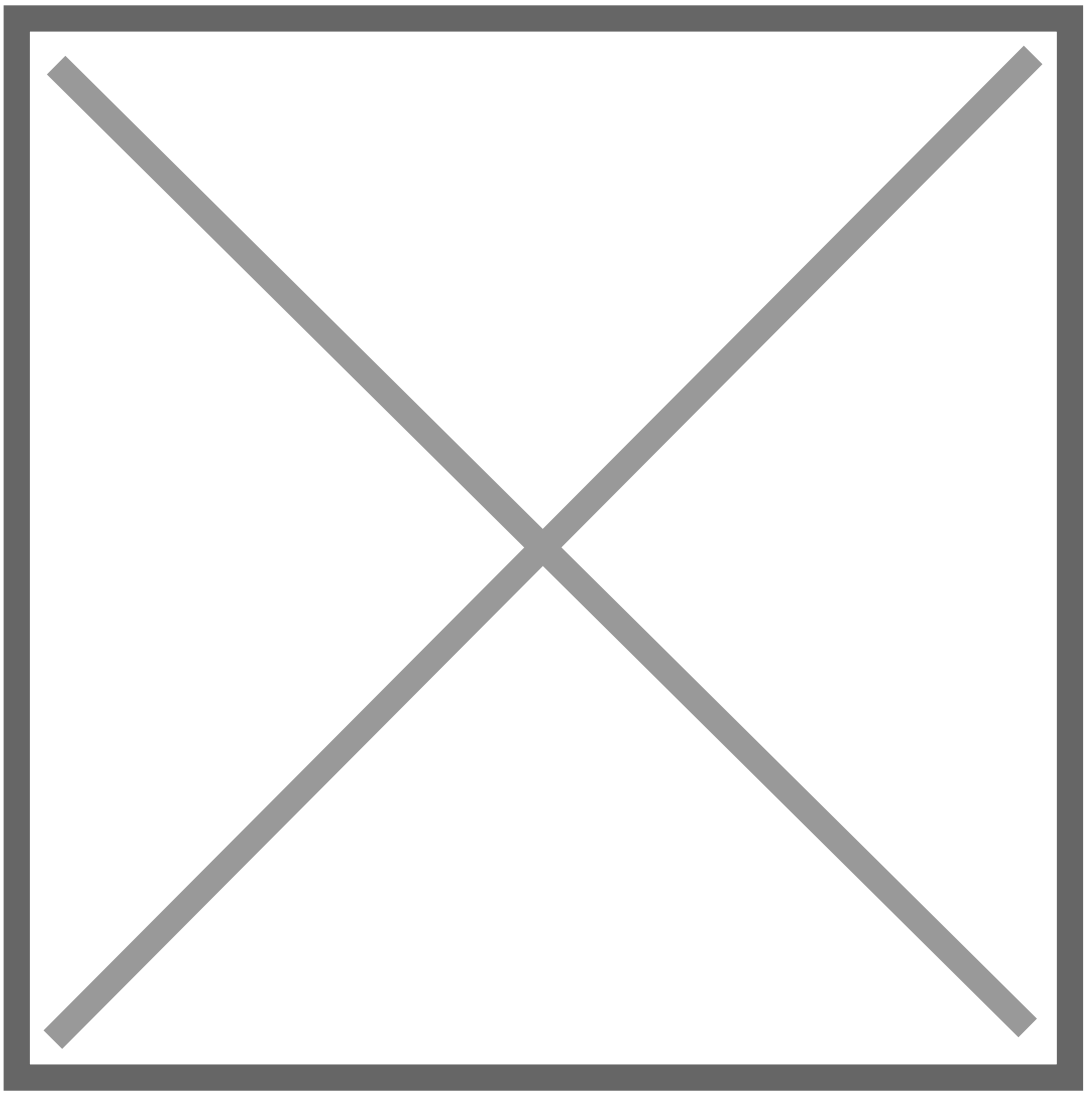
- Viewing Streamline Session Details
- Sending an Email Reminder to Complete an Assignment
- Creating a Signable Document Without Using a Form
- Viewing Completed Workflow Documents
- COI Workflow
  - The Workflow
  - COI Training Links
  - Campus COI Contacts

Viewing Streamline Session Details

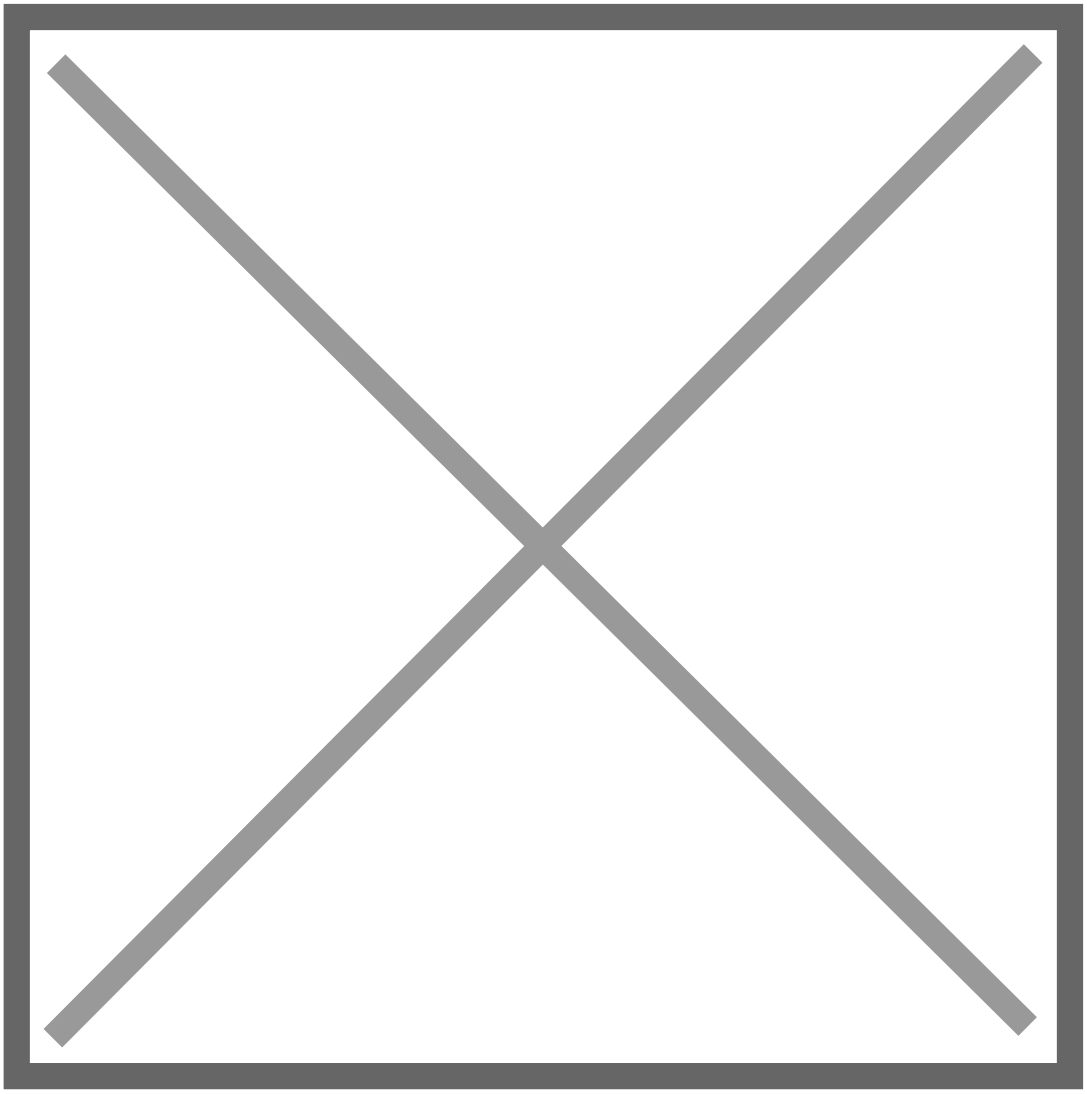
This guide provides a straightforward walkthrough for accessing and reviewing detailed session data within your Intellistack workspace. Follow these steps to efficiently navigate your project records and retrieve specific session information.

Workspace Navigation

1. Open Streamline and click "Workspace"

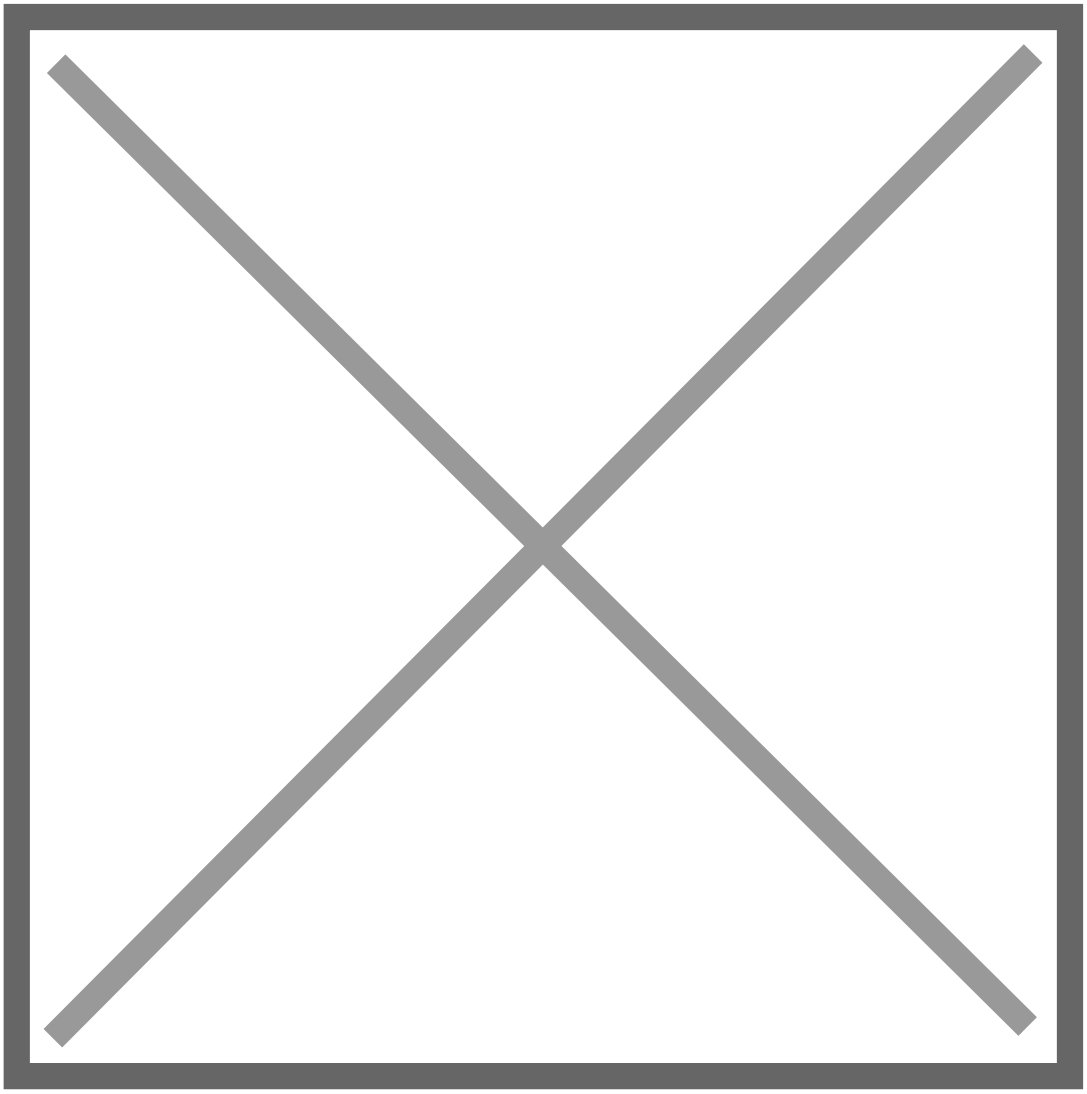


2. Click "All sessions"
Assigned to you is also useful, but only for *your* individual tasks. To view all of the workflow sessions, select all sessions.

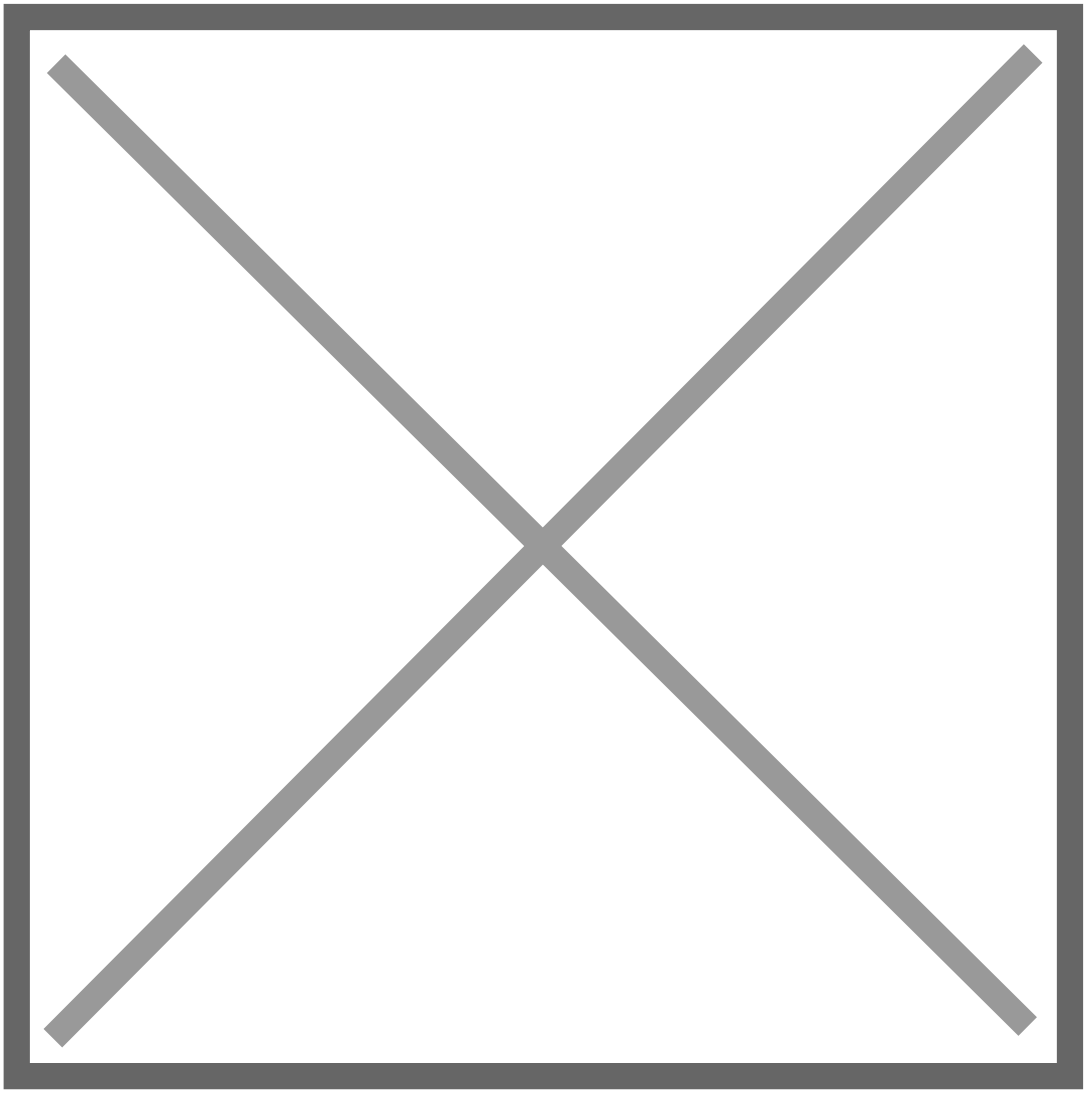


Session List

3. Click the Show data toggle to reveal the session names. This makes it easier to identify specific sessions.

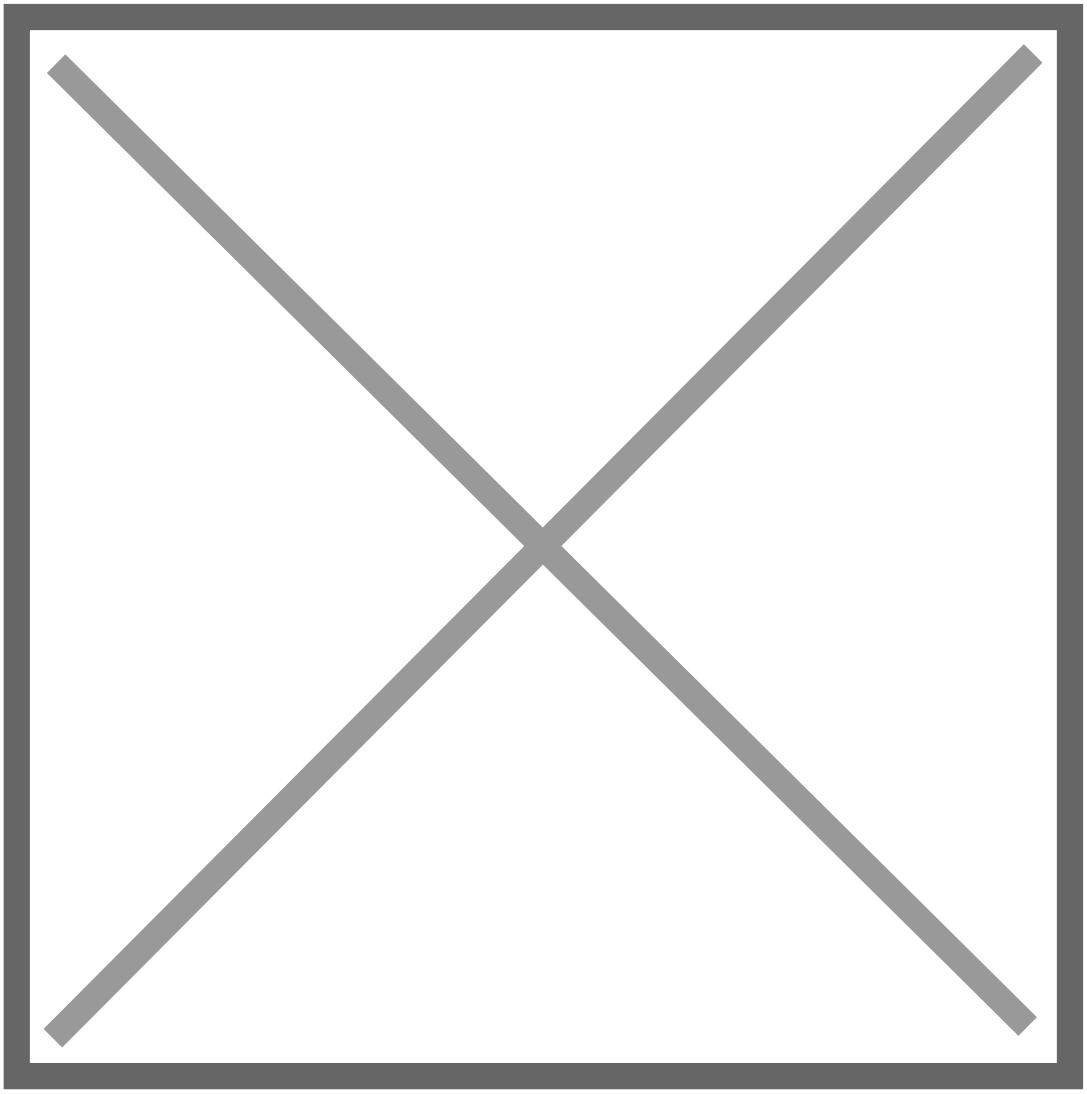


4. In the column "Project name", you will be able to see what workflow the session is a part of.



5. Click the session row’s expand icon.

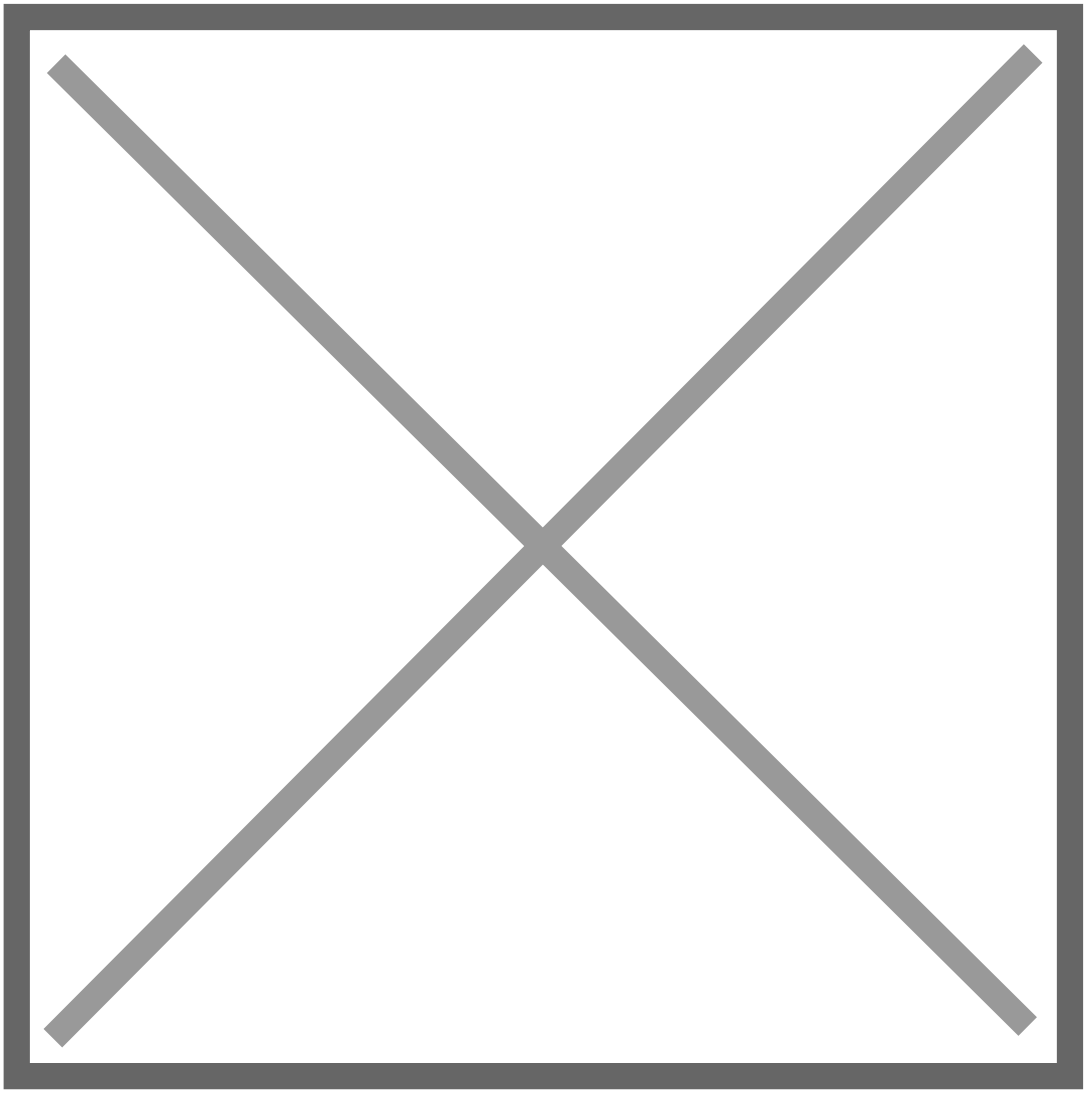
You will have to scroll all the way to the right with the scroll bar at the bottom, or if your mouse has a middle wheel, you can usually press that in and slide side to side.



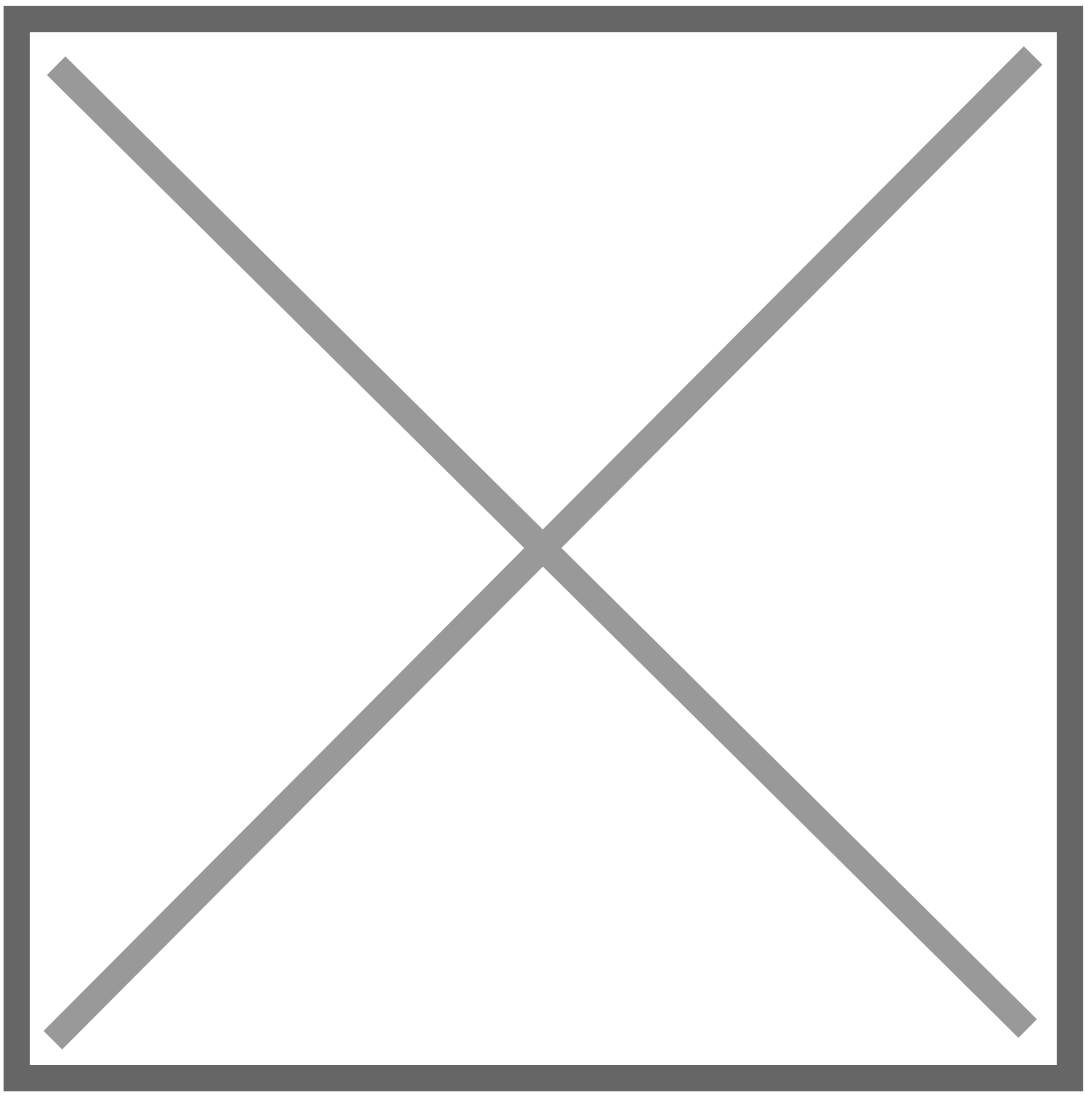
Session Details

6. Click "Session details"

There are a few important functions you can perform from this menu.



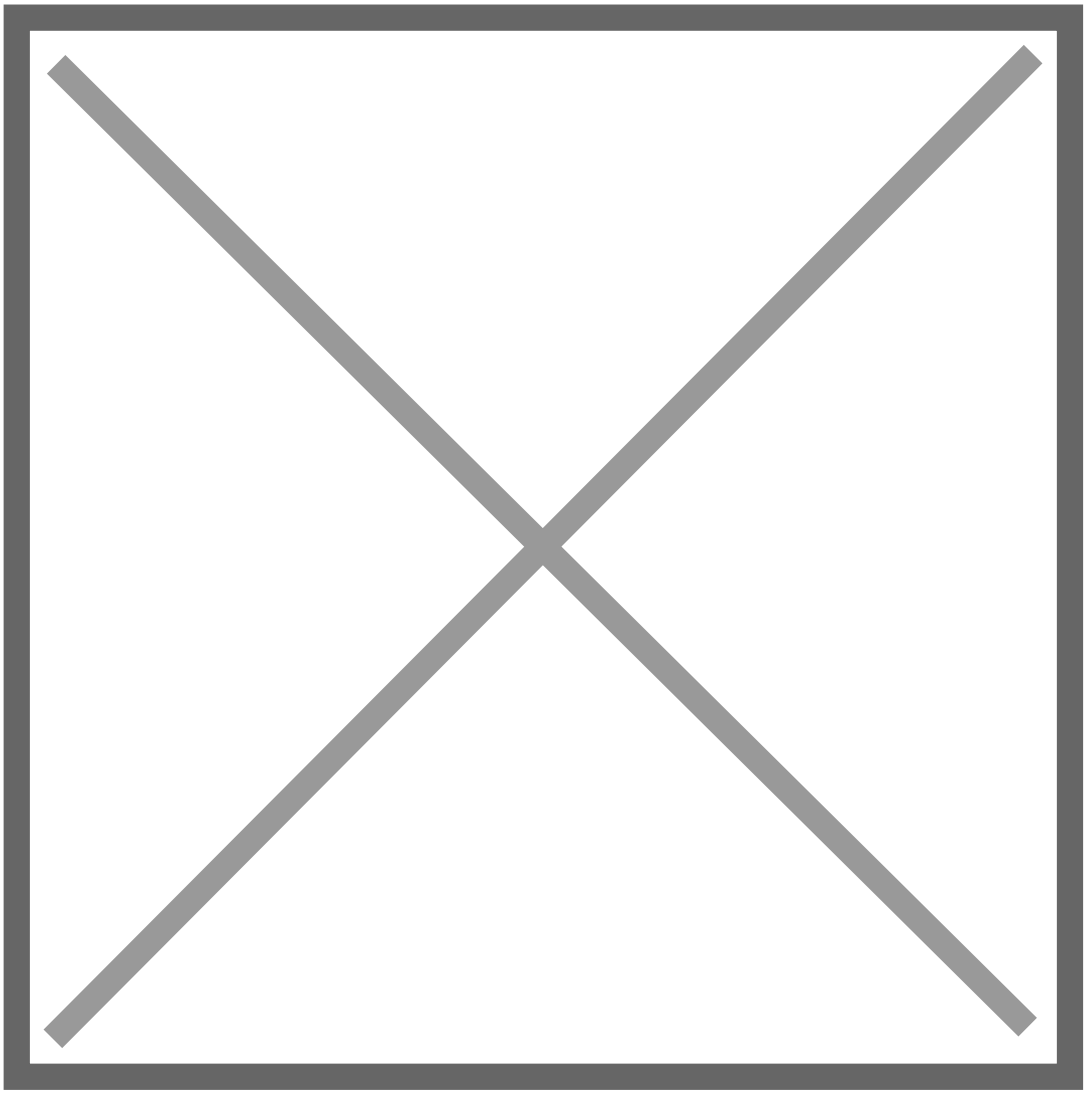
7. This will show you all of the steps the workflow has taken.



Sending an Email Reminder to Complete an Assignment

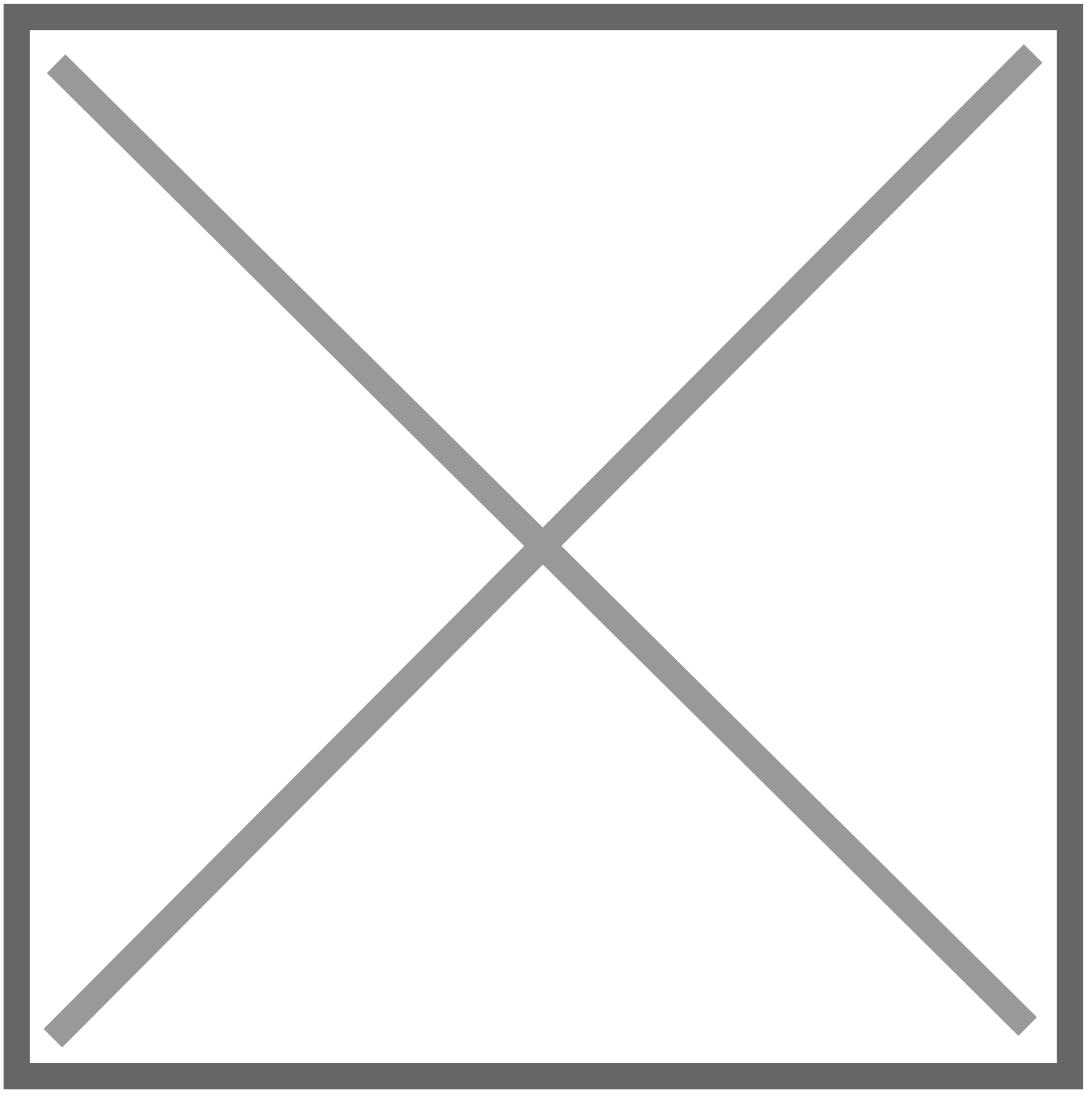
Learn how to locate specific session data and trigger an email notification for a user. This guide provides a quick workflow to identify your target project and successfully resend the relevant session details.

1. Navigate to https://us.streamline.intellistack.ai/landing-page

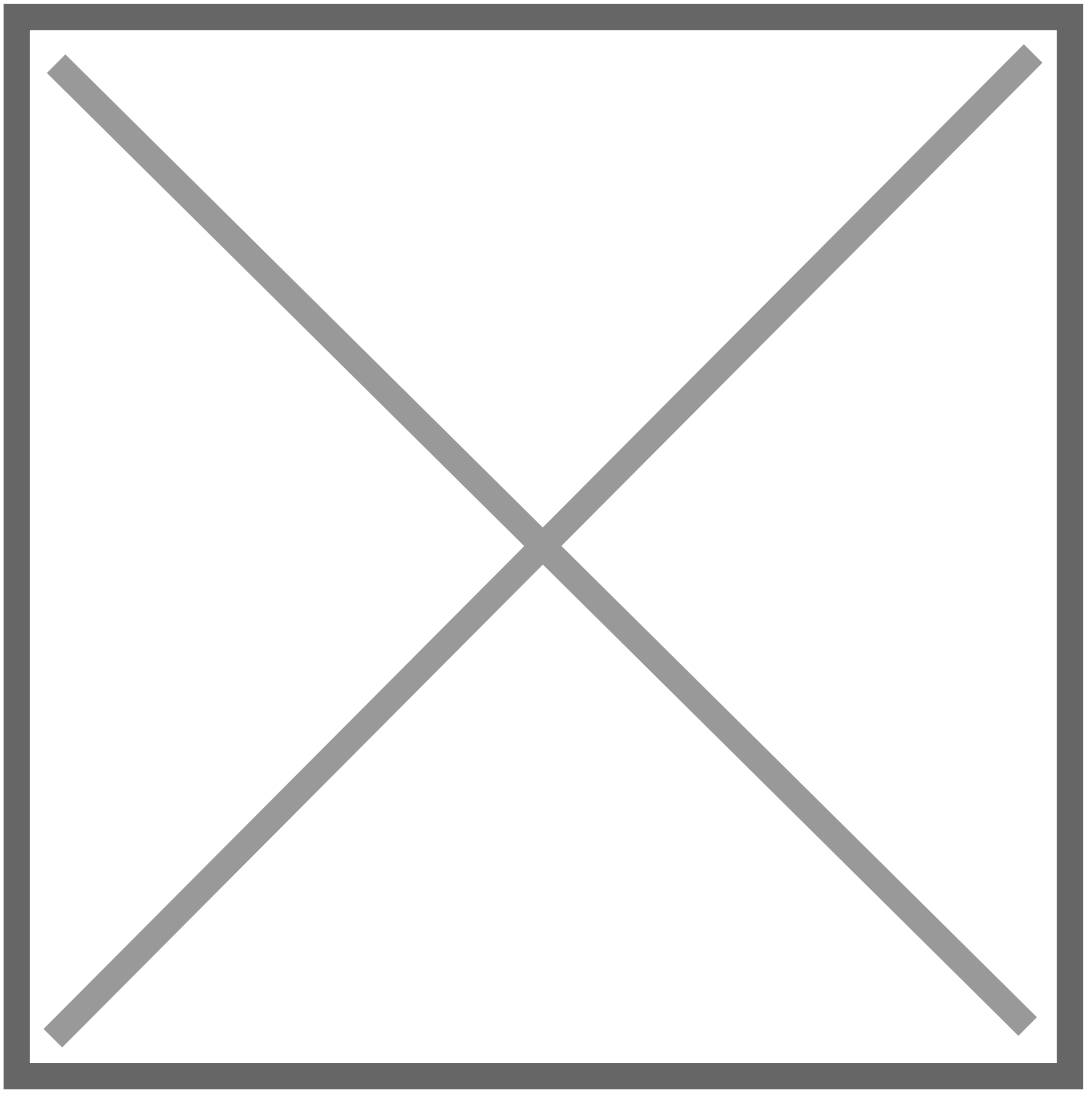


Open Workspace

2. Click "Workspace"

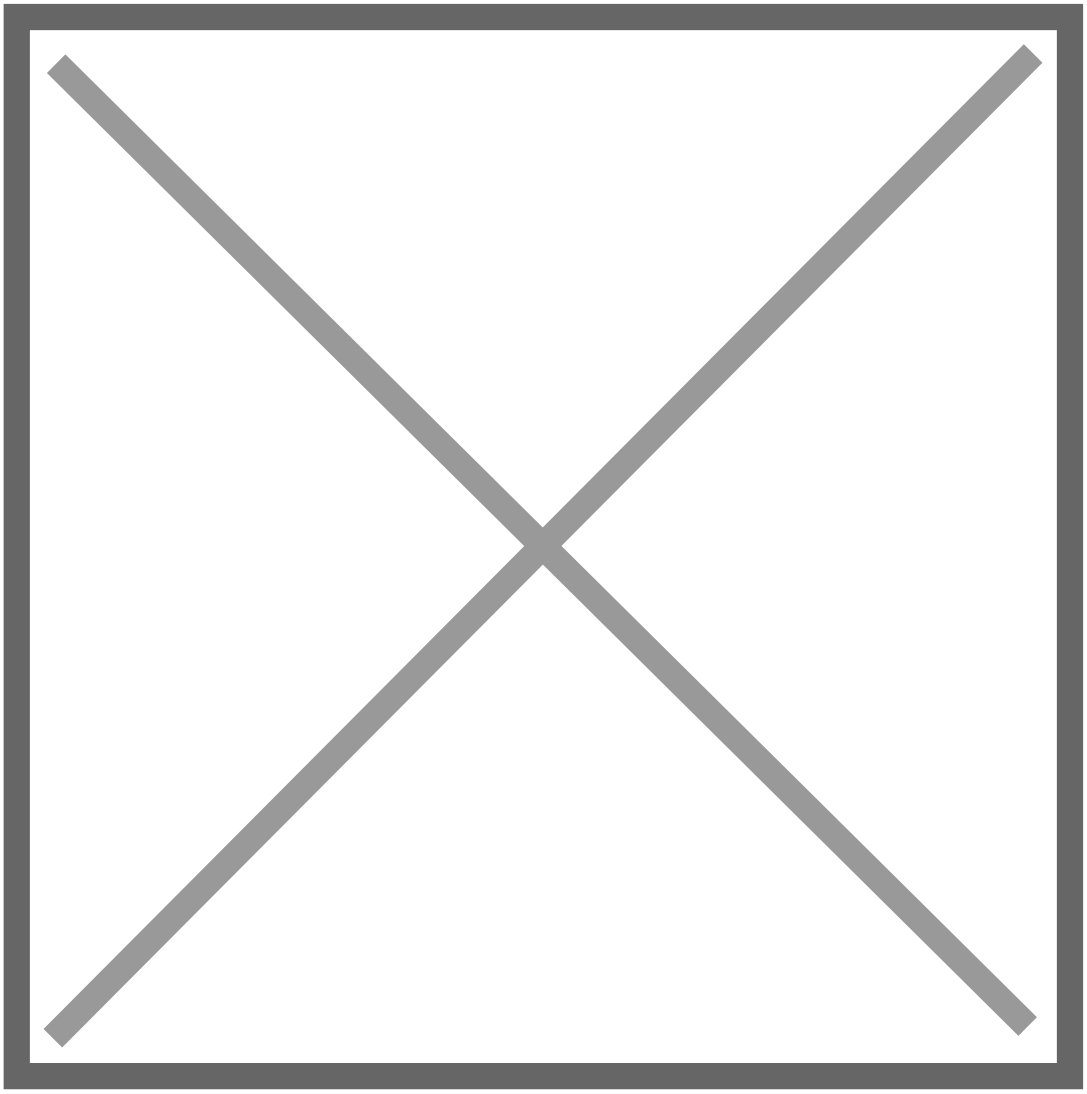


3. Click "All sessions"



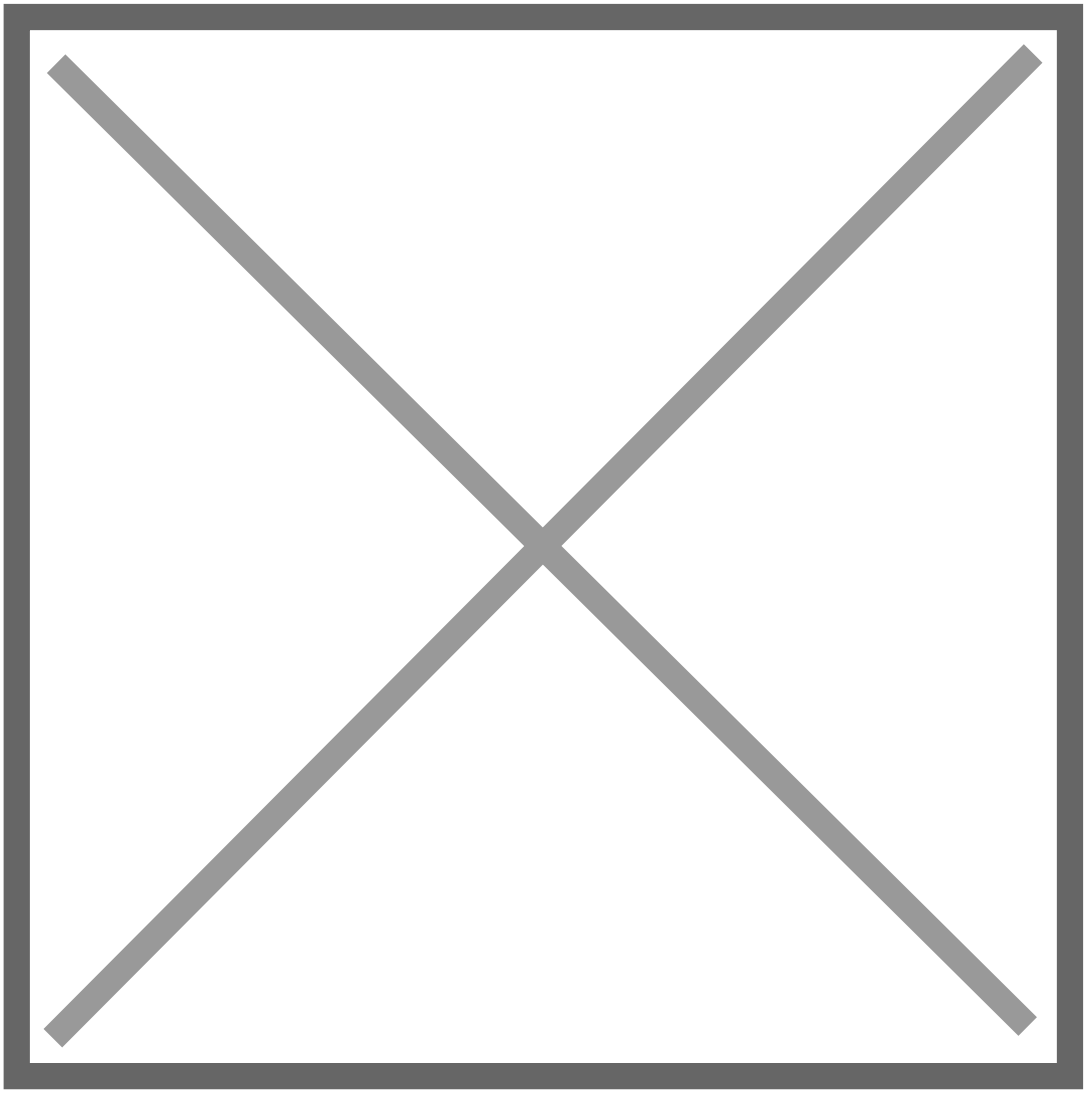
Find the Session

4. Search for "Athletics" (Or whatever the title of the workflow is)
Select "Show Data" to show the session name.



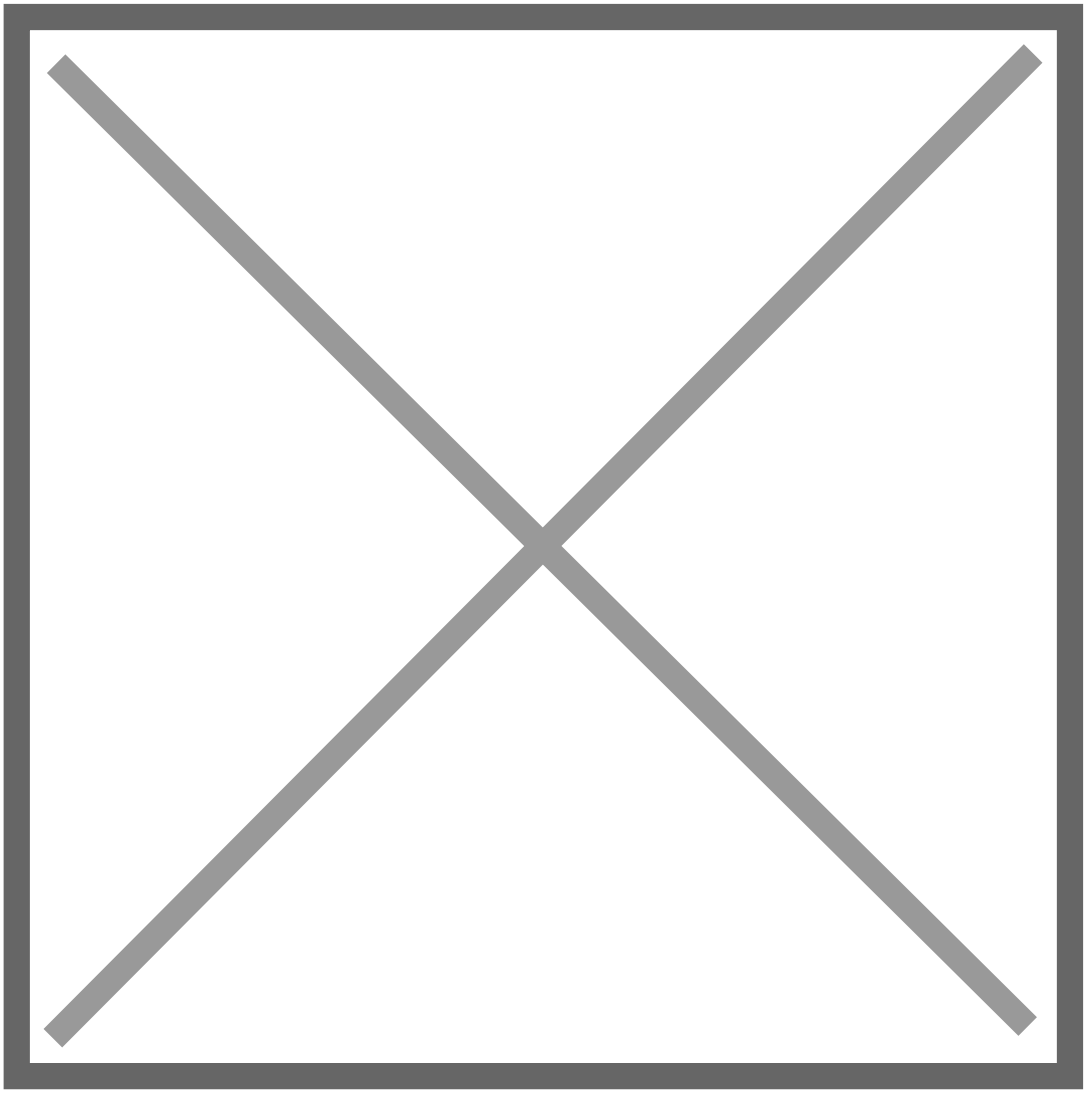
5. Scroll the results table horizontally to reveal the row actions.

You can also hold your middle mouse button down and slide your mouse to the right/left.

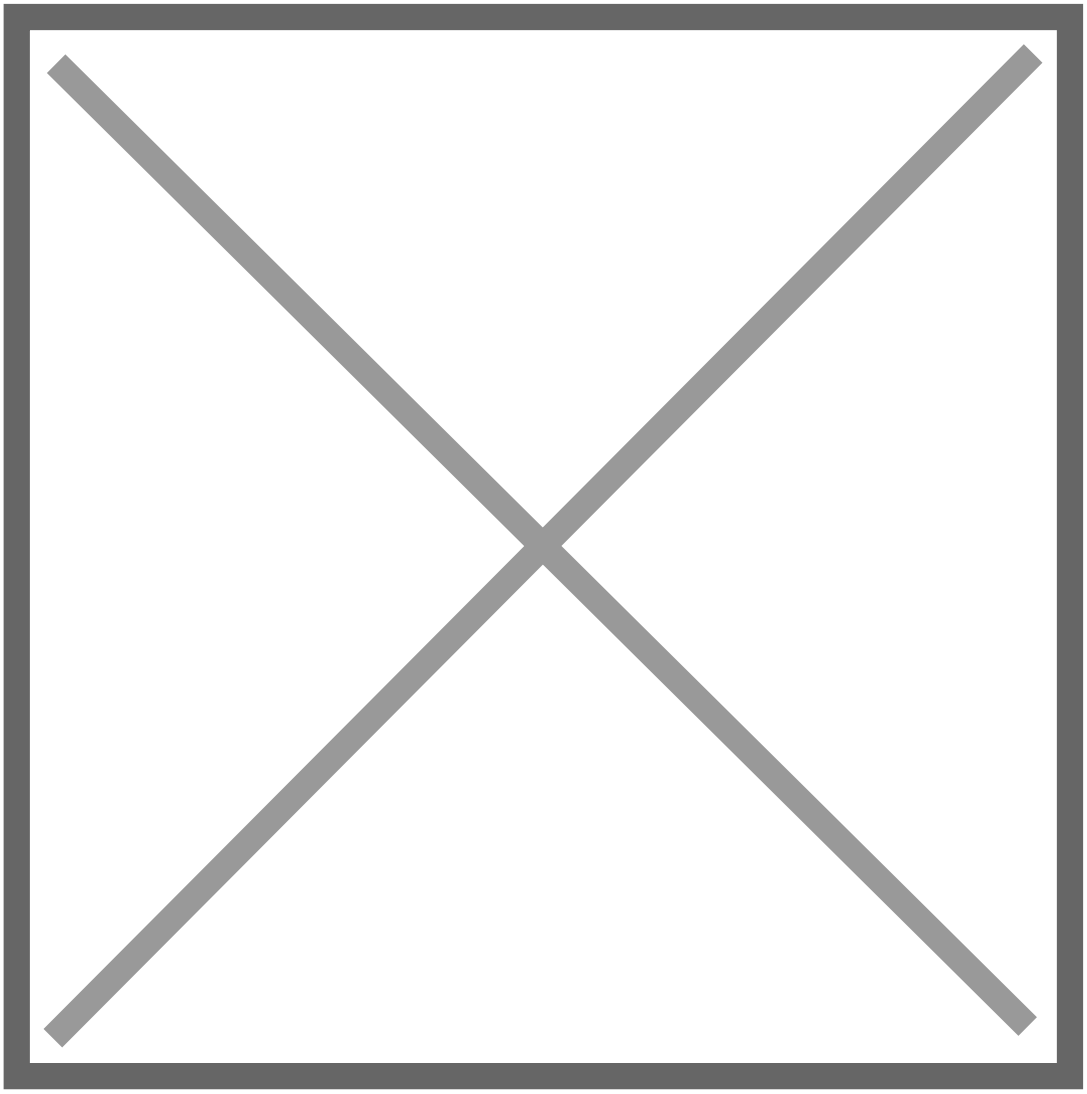


Resend the Request

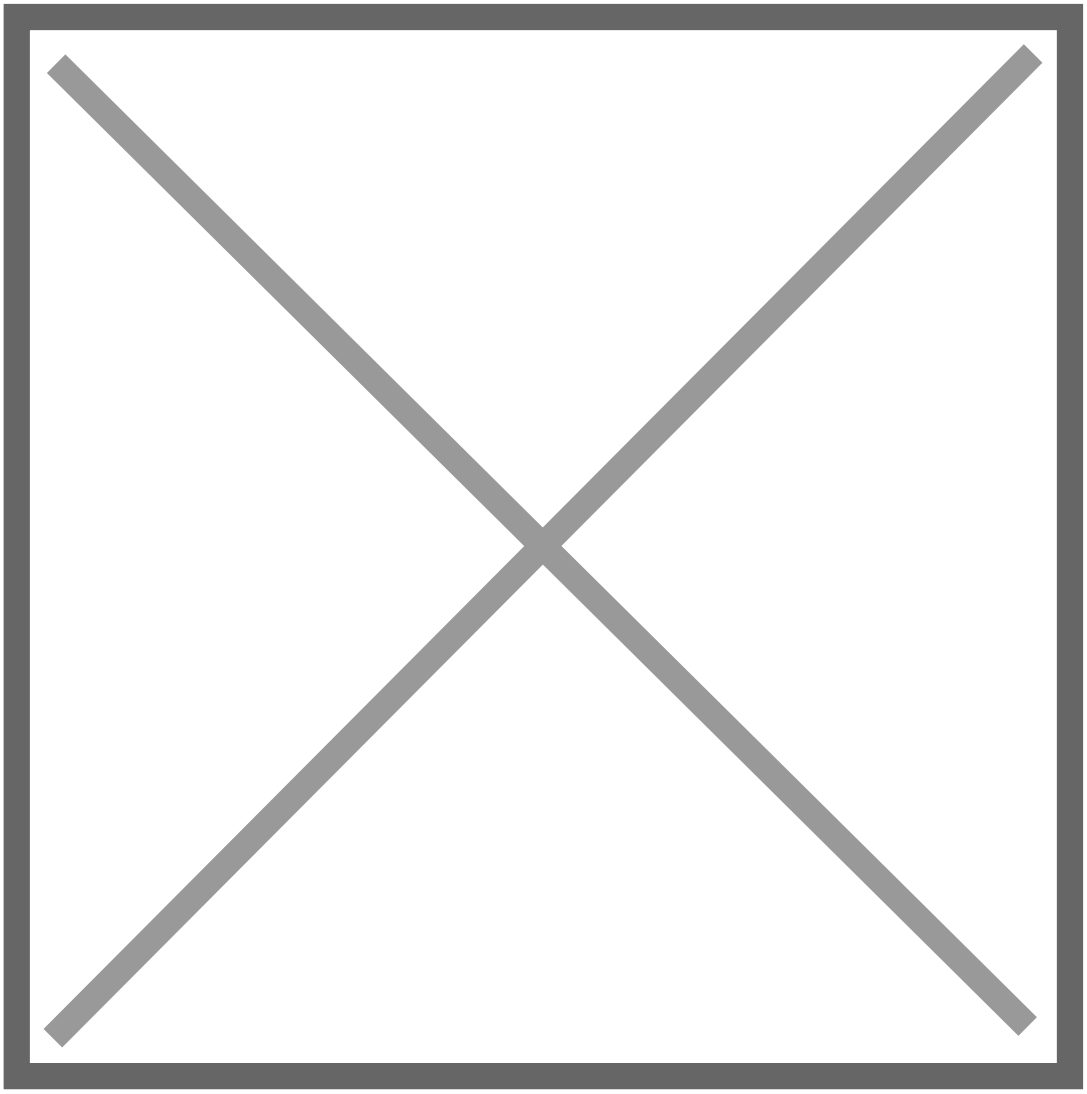
6. Click the row actions menu (3 dots) for the matching session.



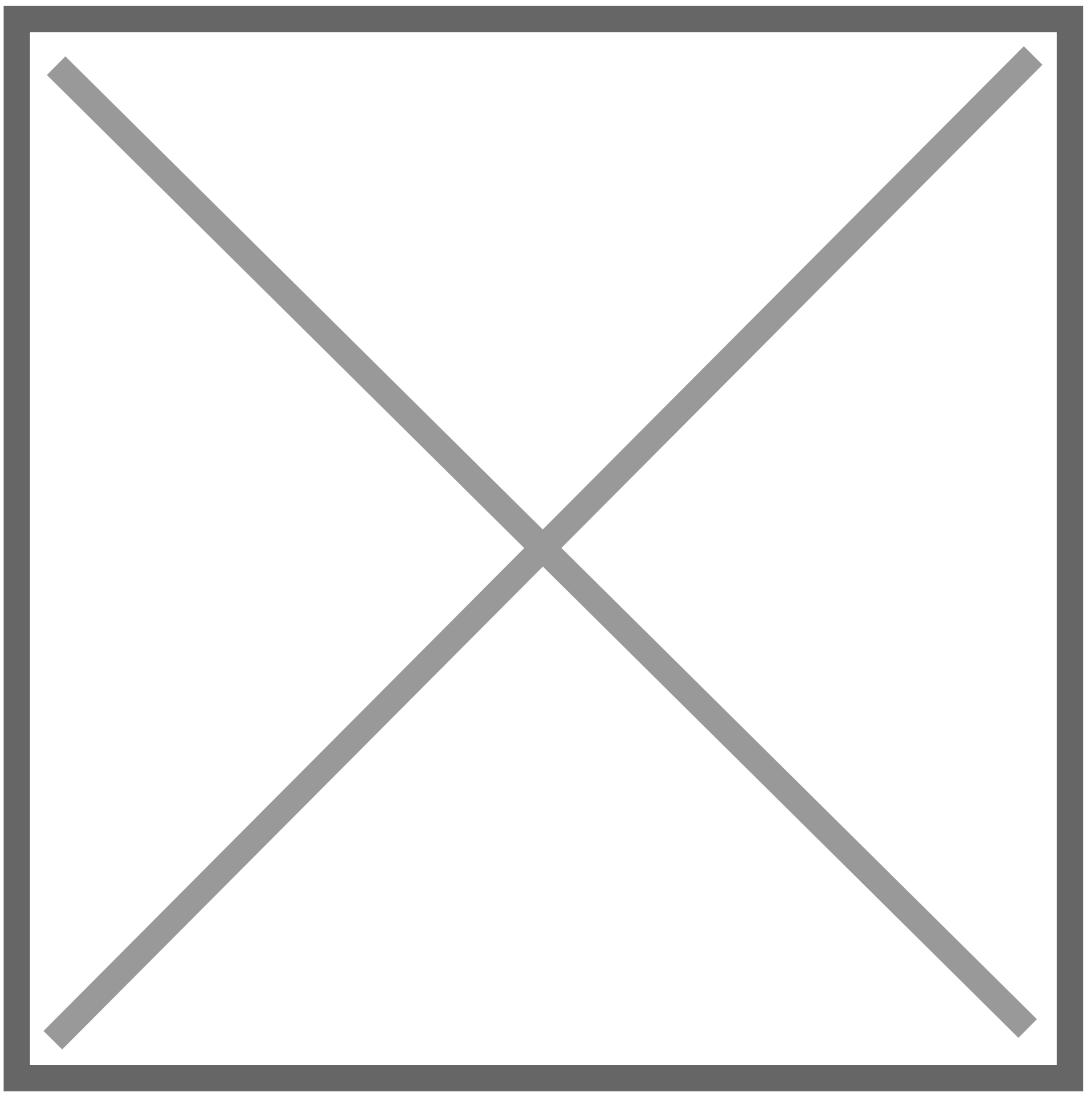
7. Click "Resend via email"



8. If you want to view the session workflow, click "Session details".



9. Click "Send"
You may edit this area, but by default, it will use the applicable email address. If you want to reassign it to someone else, be sure to put their email address in the box.

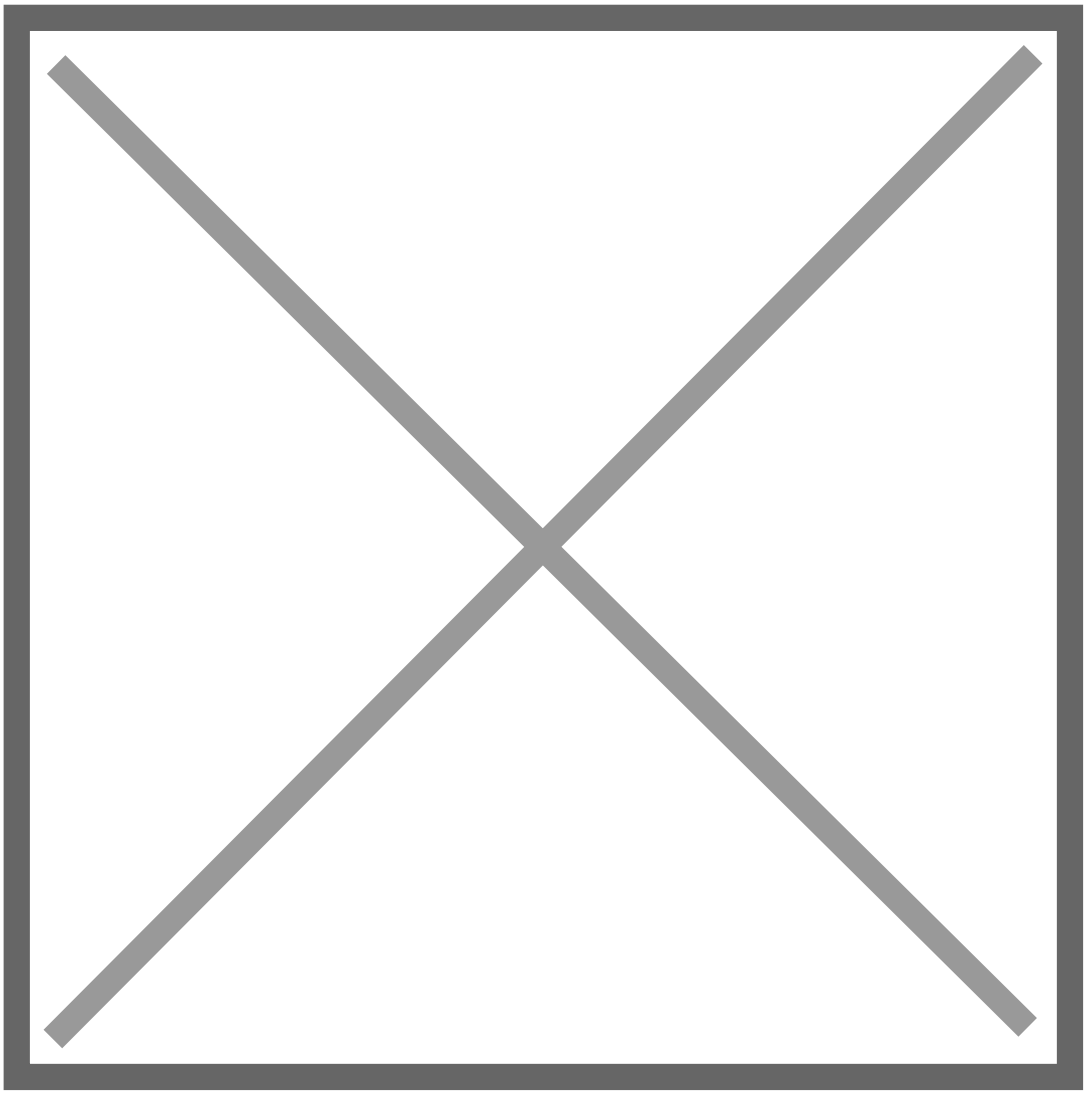


Creating a Signable Document Without Using a Form

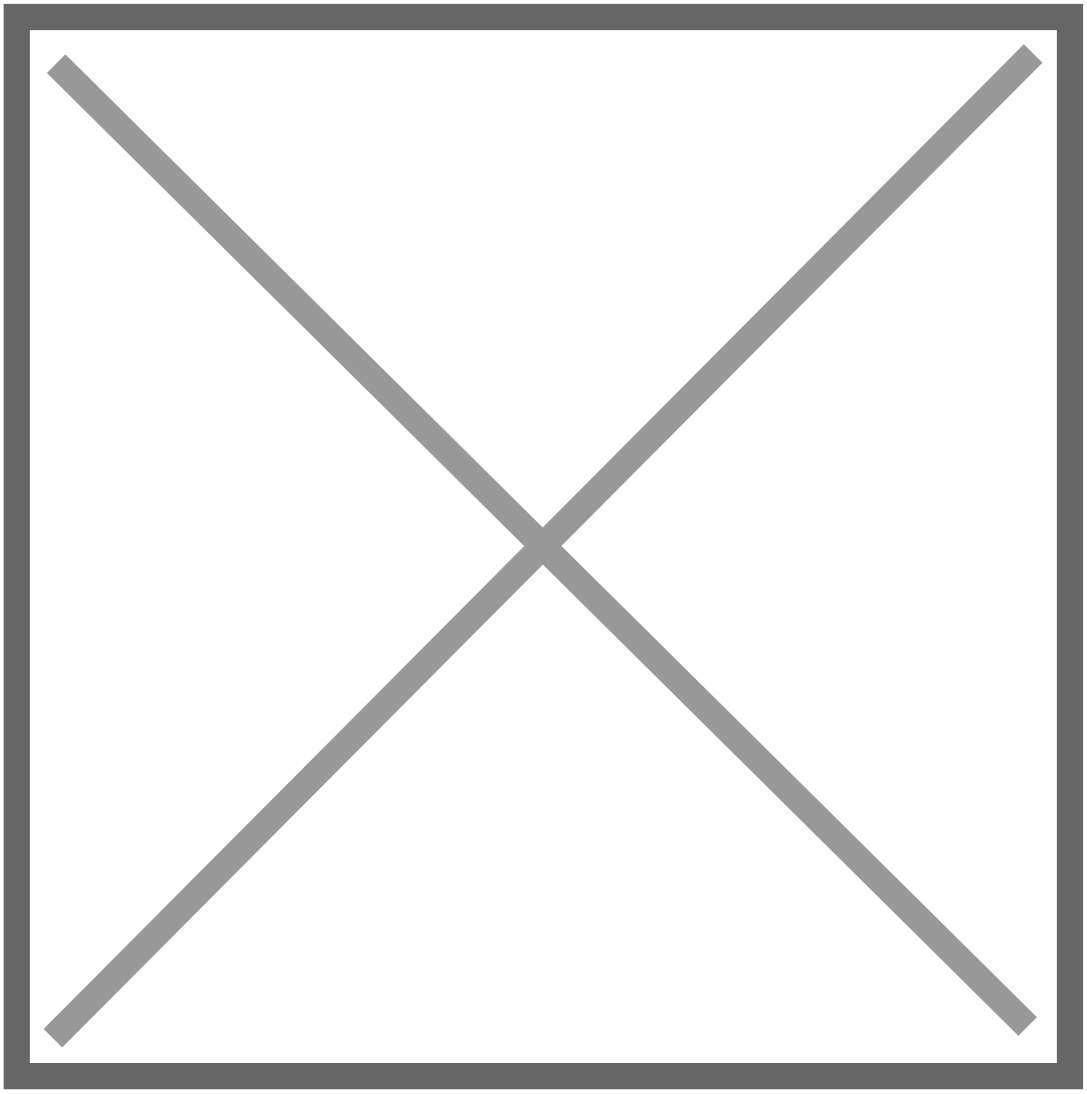
Learn how to set up a new project, configure document signers, and add necessary input fields for a formal signing process. This guide covers the complete workflow from document upload to publishing and sharing with designated recipients. **This is not for workflows that require a form.**

Project Setup

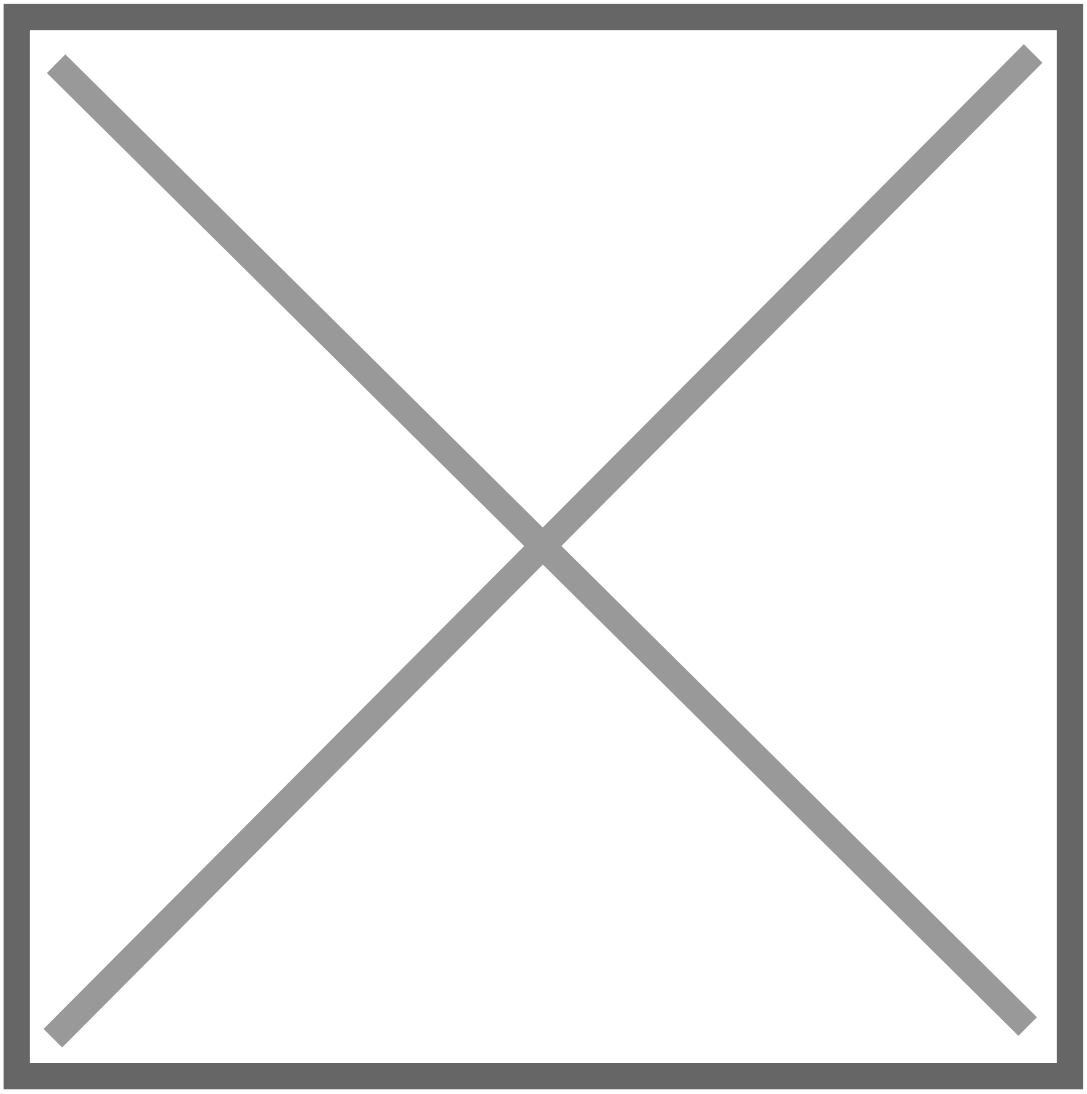
1. Navigate to https://us.streamline.intellistack.ai/projects



2. Click "New project"

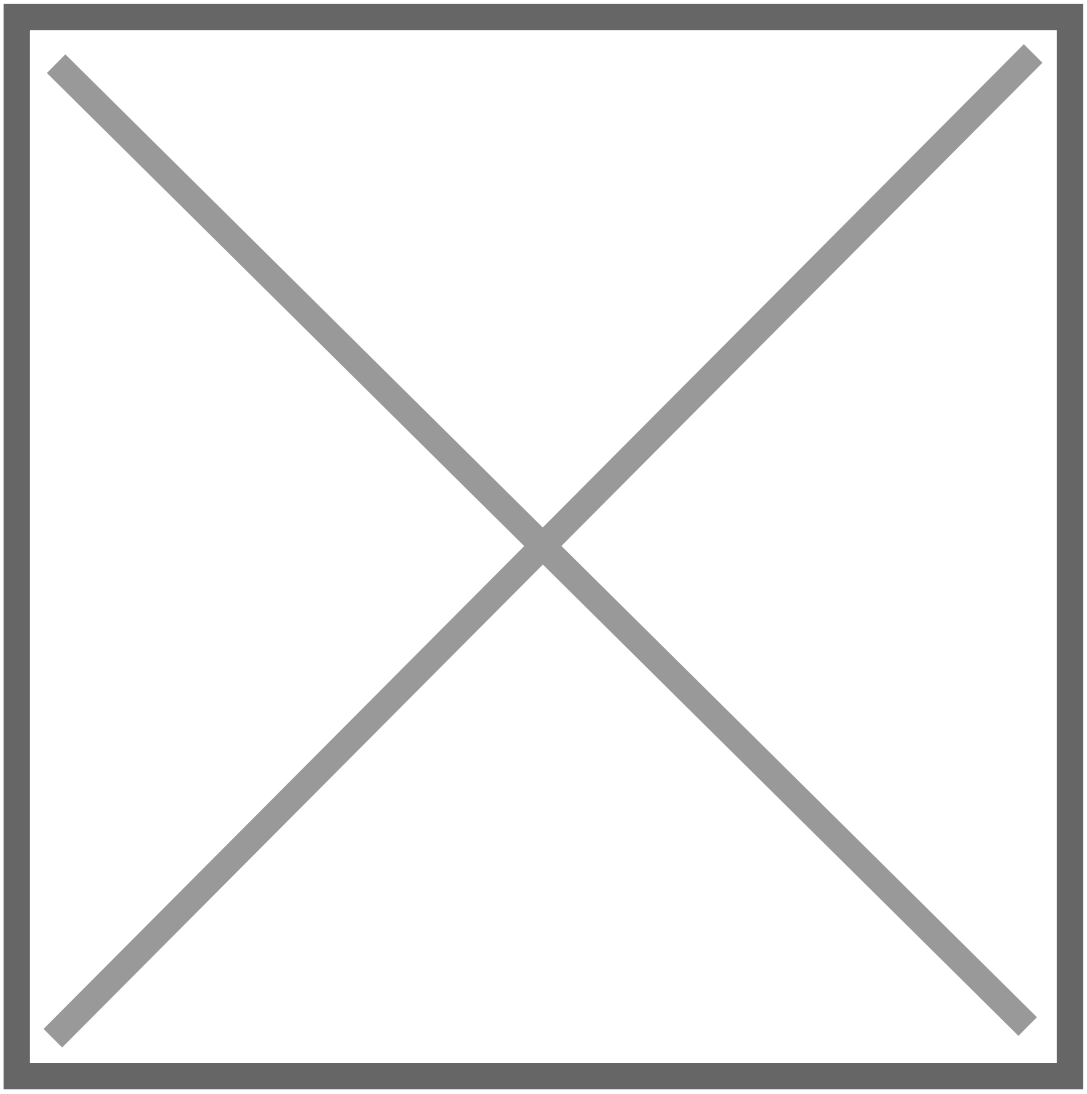


3. Enter the project name.

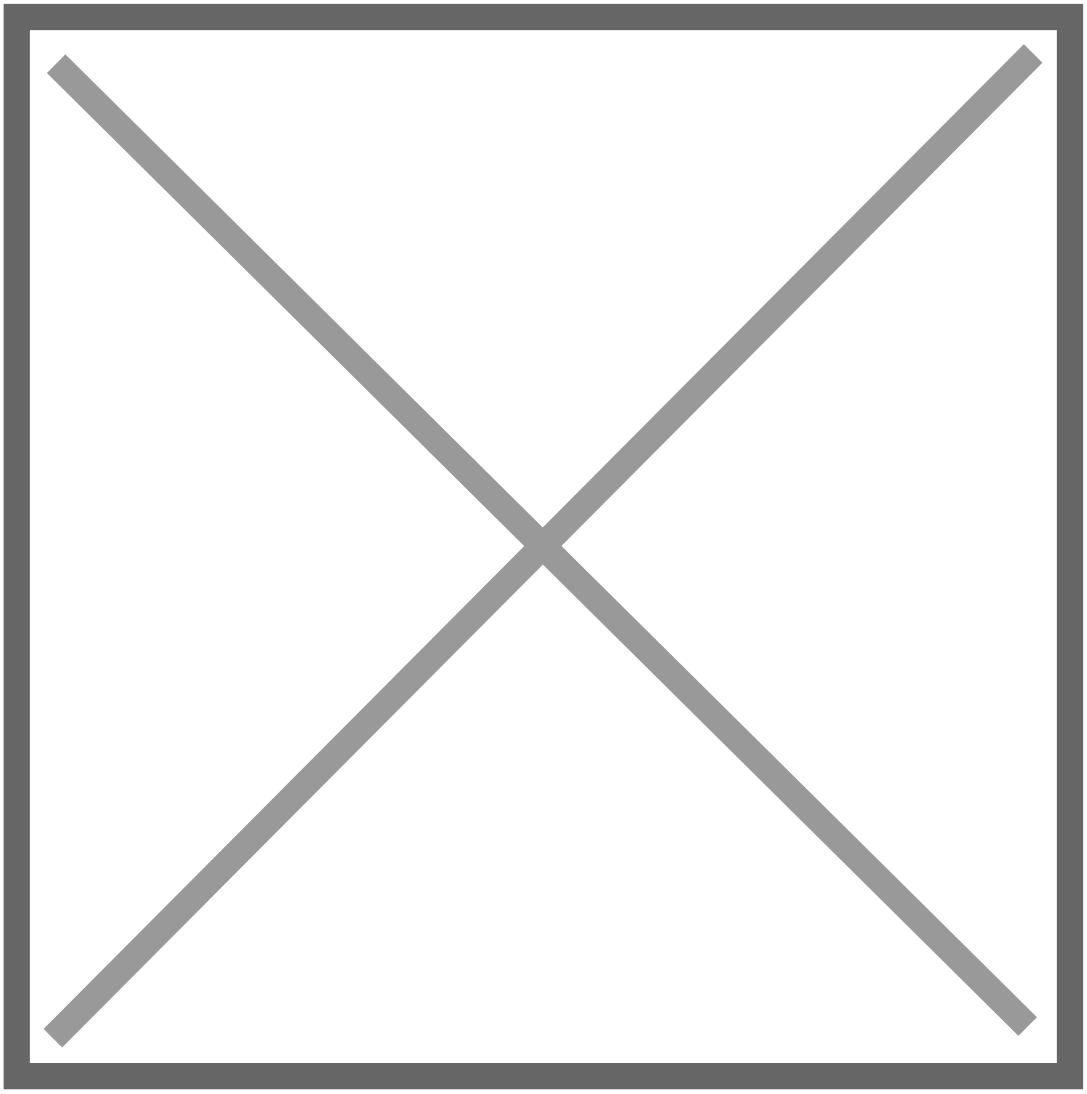


4. Select No authentication.

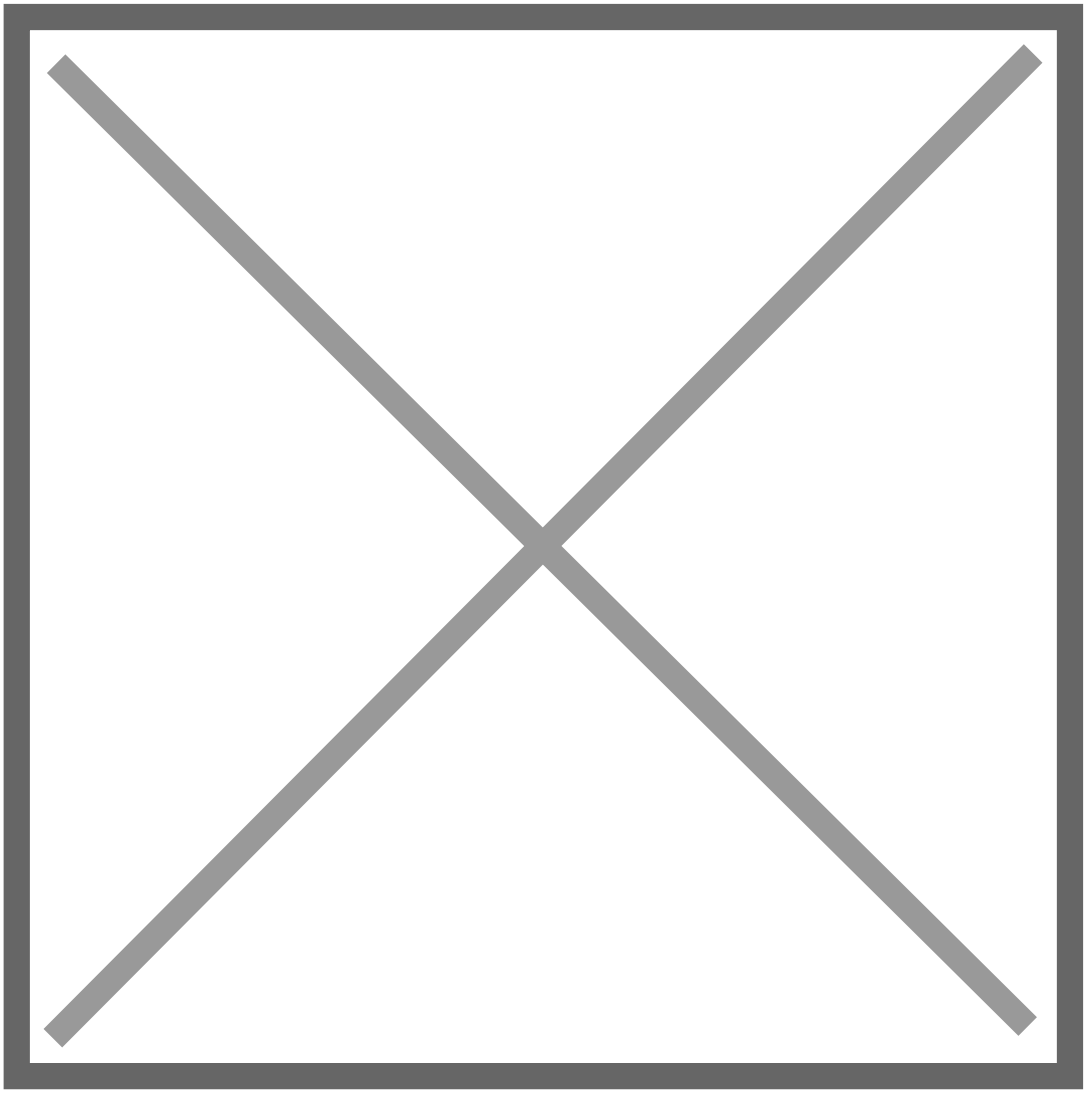
Using "Login required" will require the user to create an account and verify it through email. This is very rare.



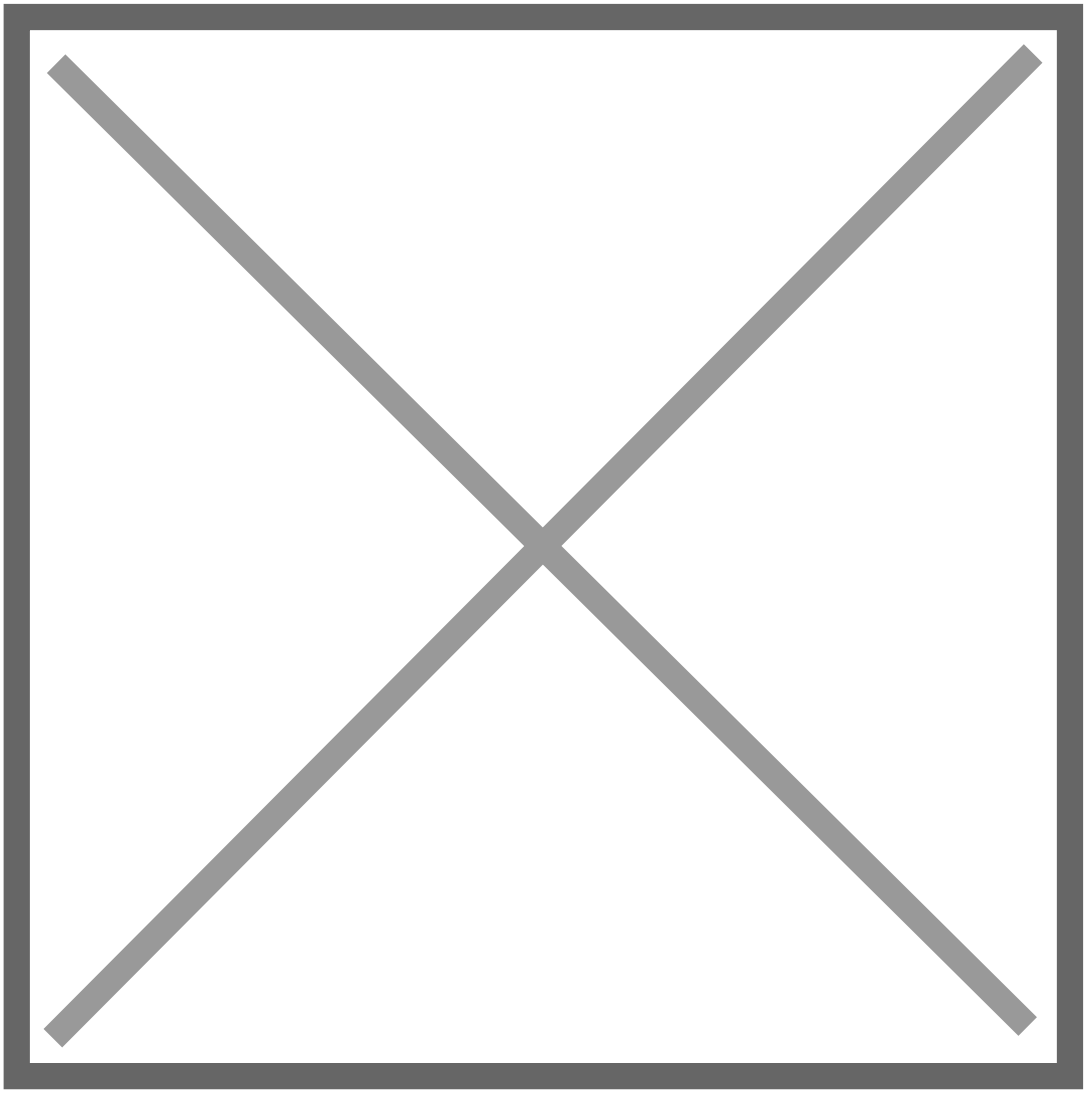
5. Click "Next"



6. Click Add users or groups to add any groups or users that may need access to the project.



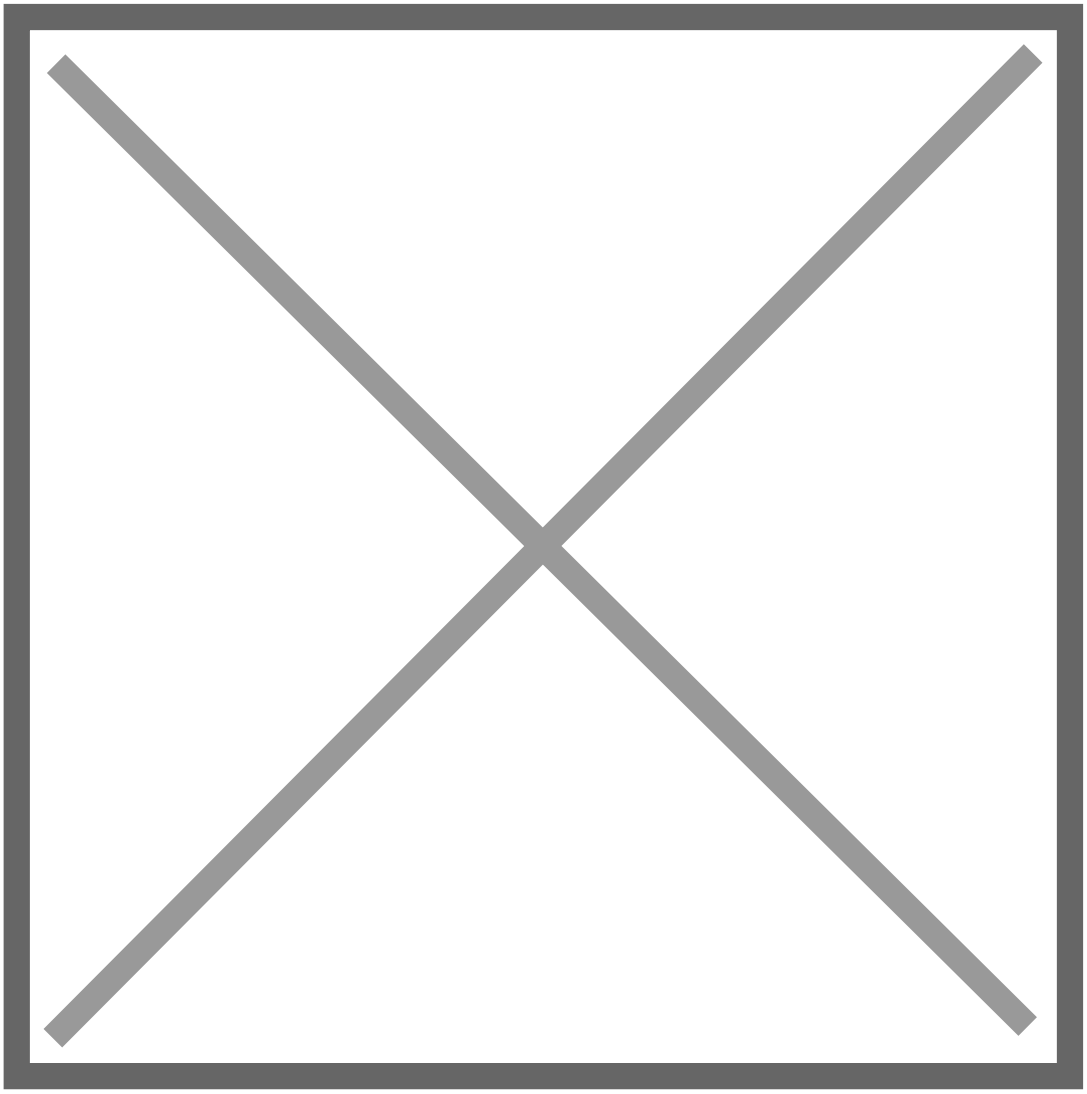
7. Click "Create project"



Workflow Builder

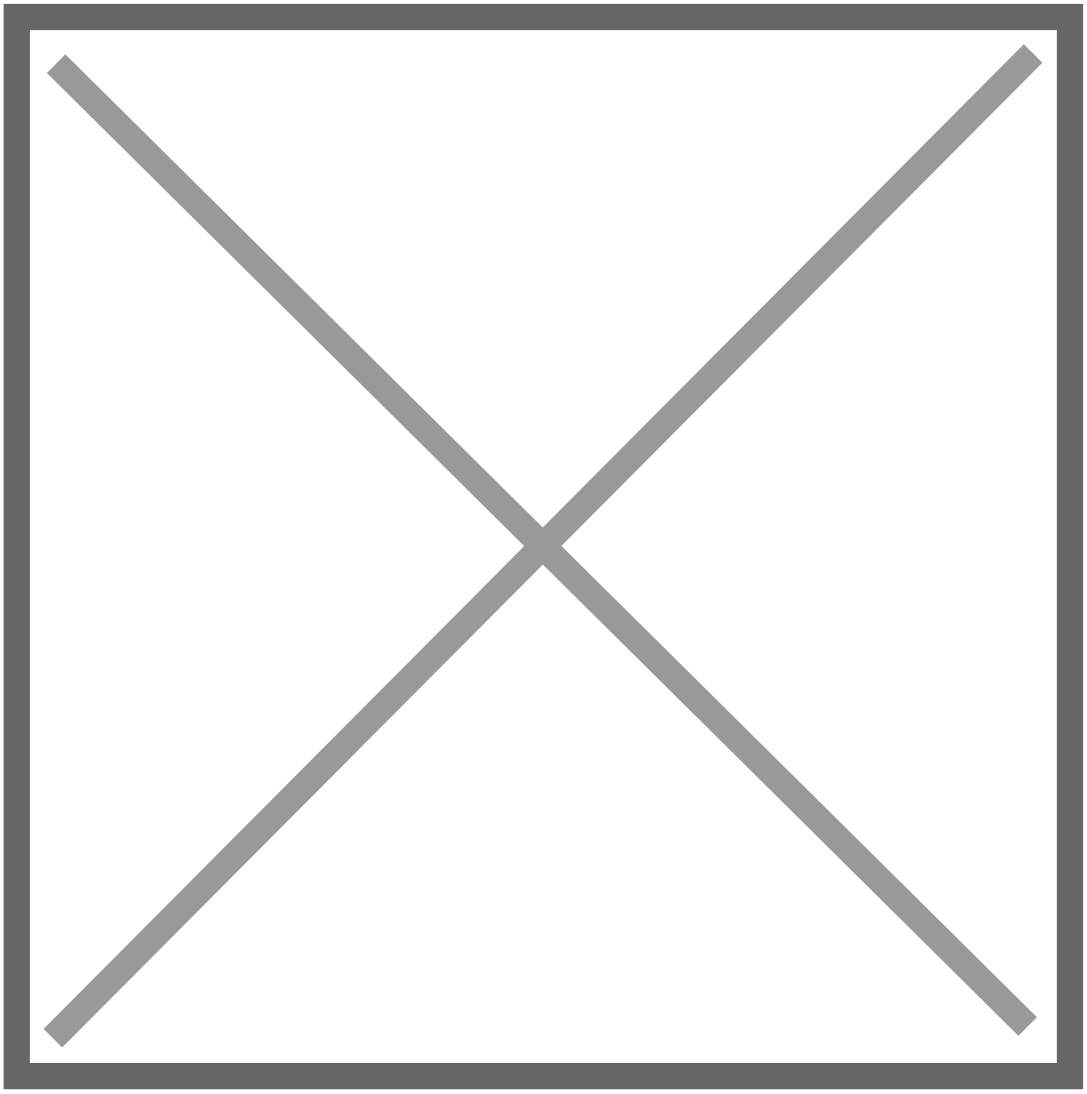
8. Close the Omni chat panel.

If you choose to use the Omni AI builder, manually review the steps for accuracy.

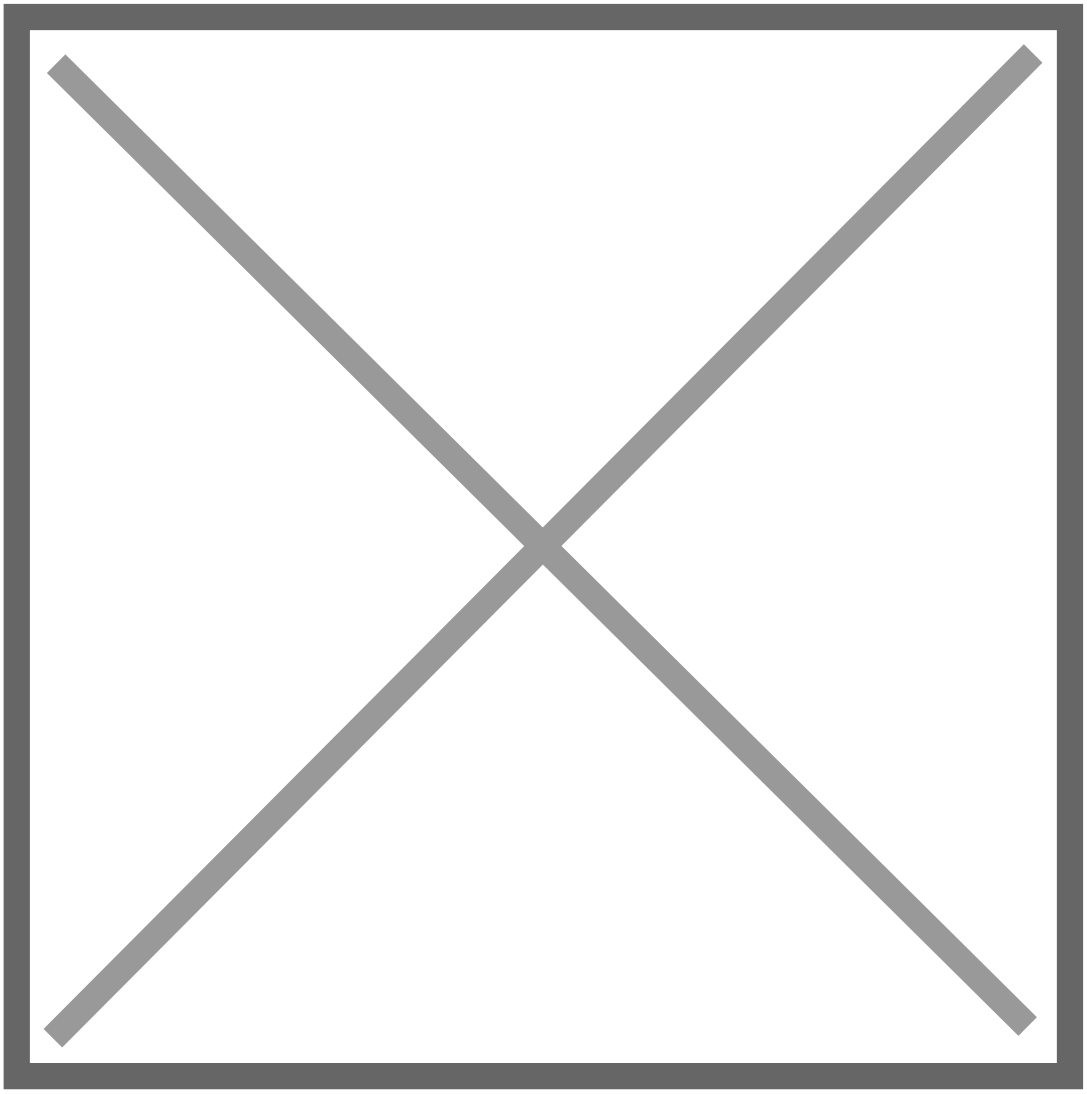


9. Click the plus button on the workflow canvas.

Click "Document"



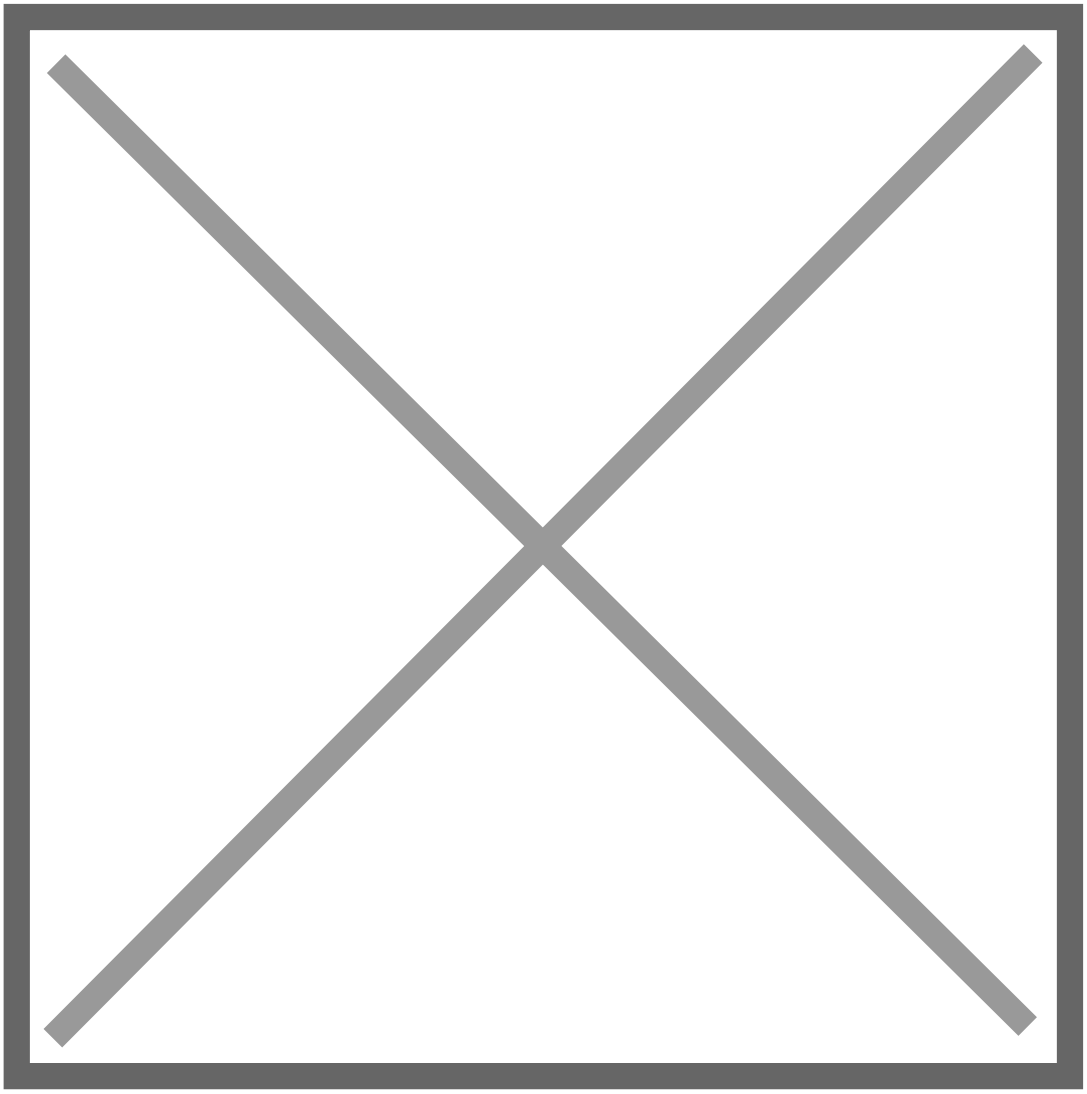
10. Name your document.



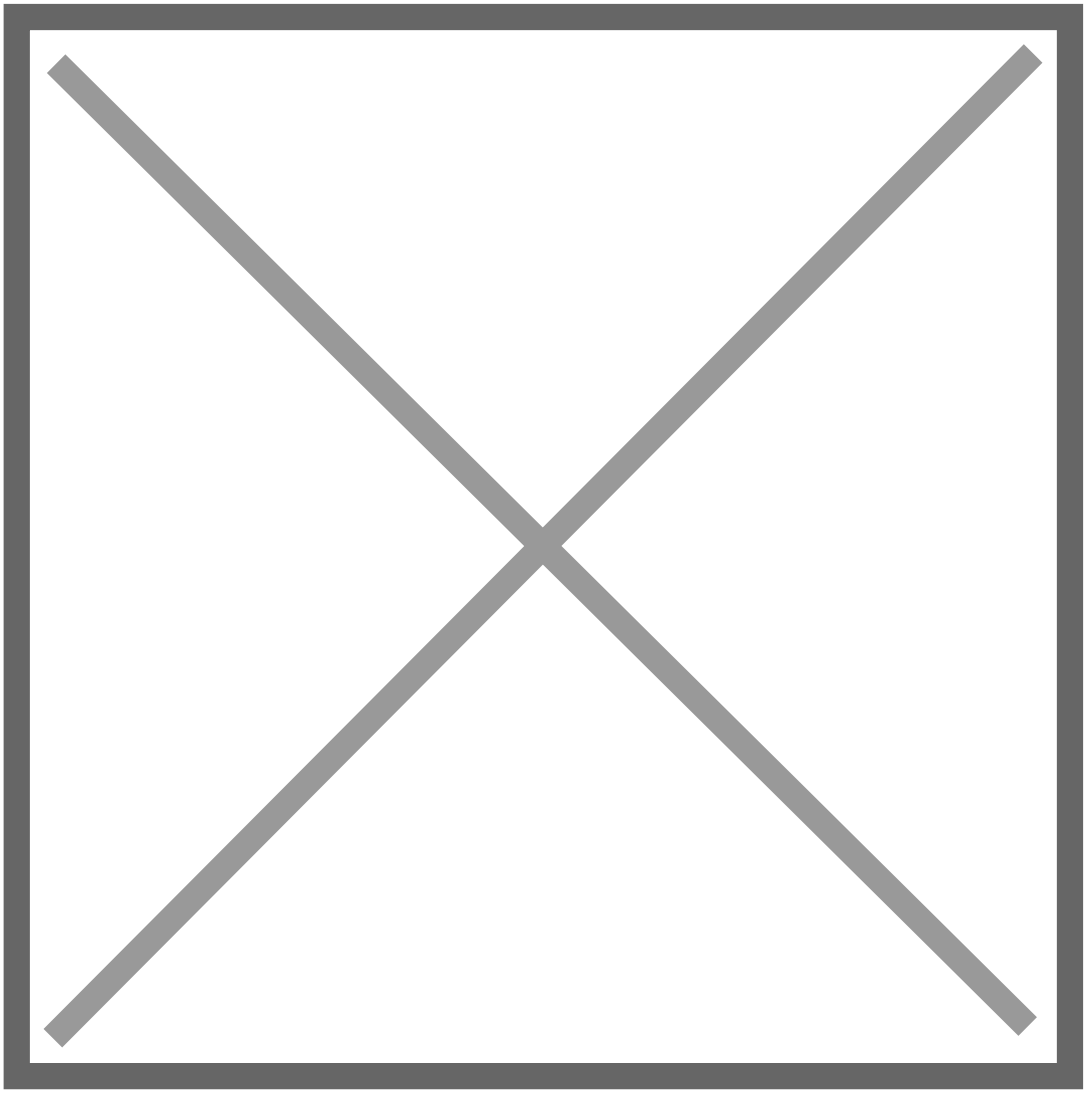
Document Configuration

11. Click Upload file.

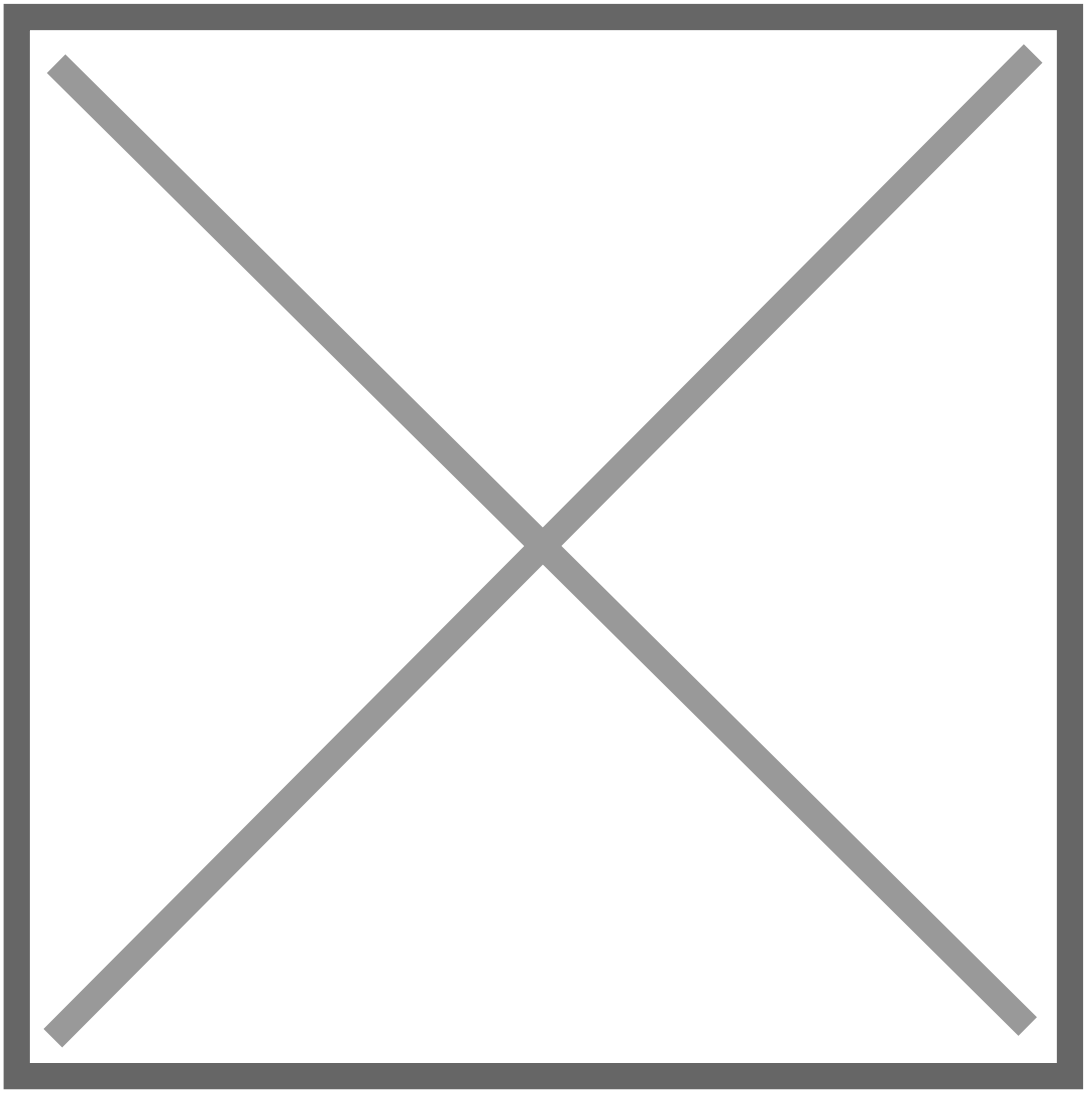
You can create a document with that option. It will take you to a standard text editor (like Word) to begin creating the document. Uploading a file already created is the most common.



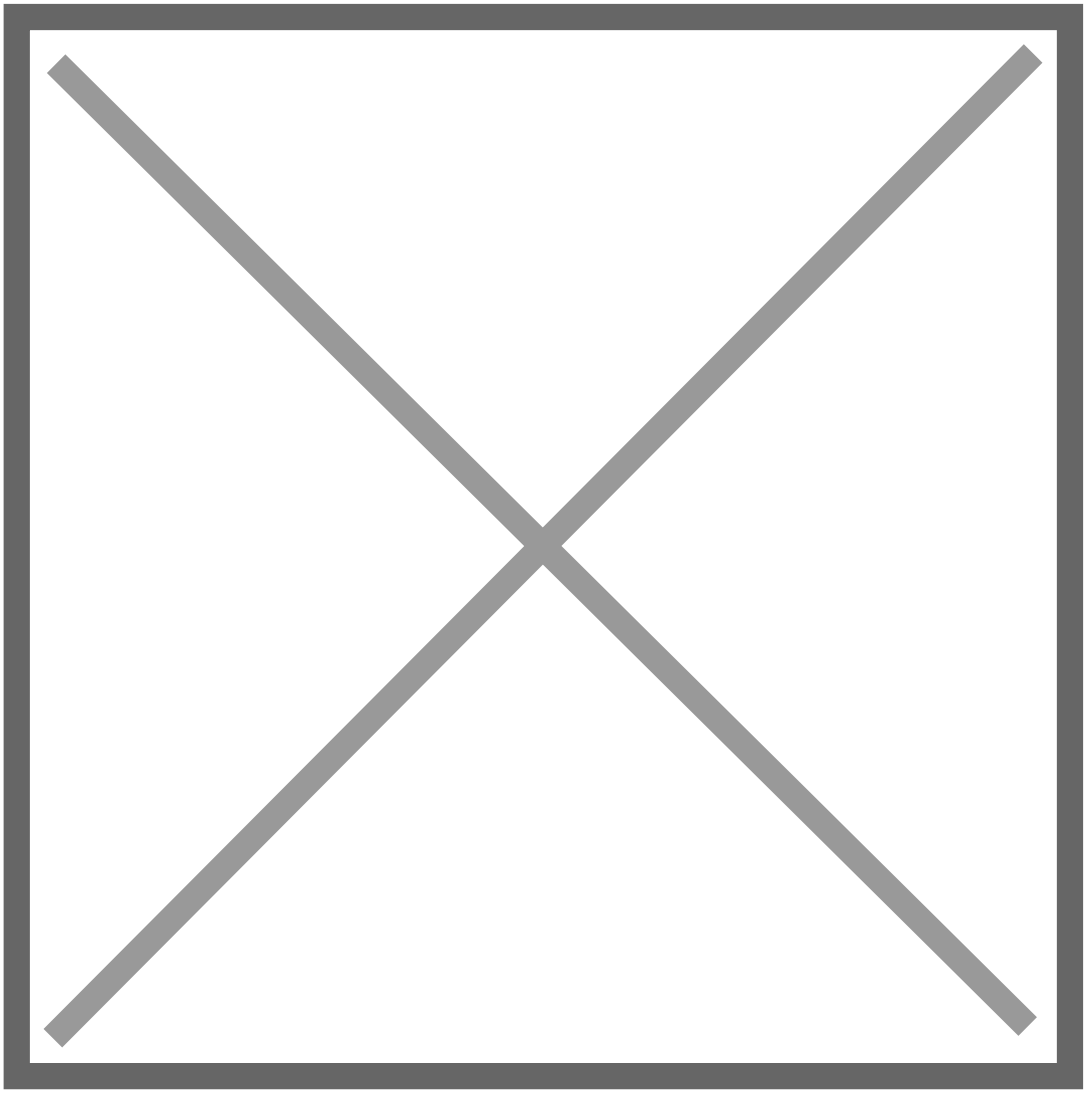
12. Open the Sign fields tab.



13. Click Add signer.

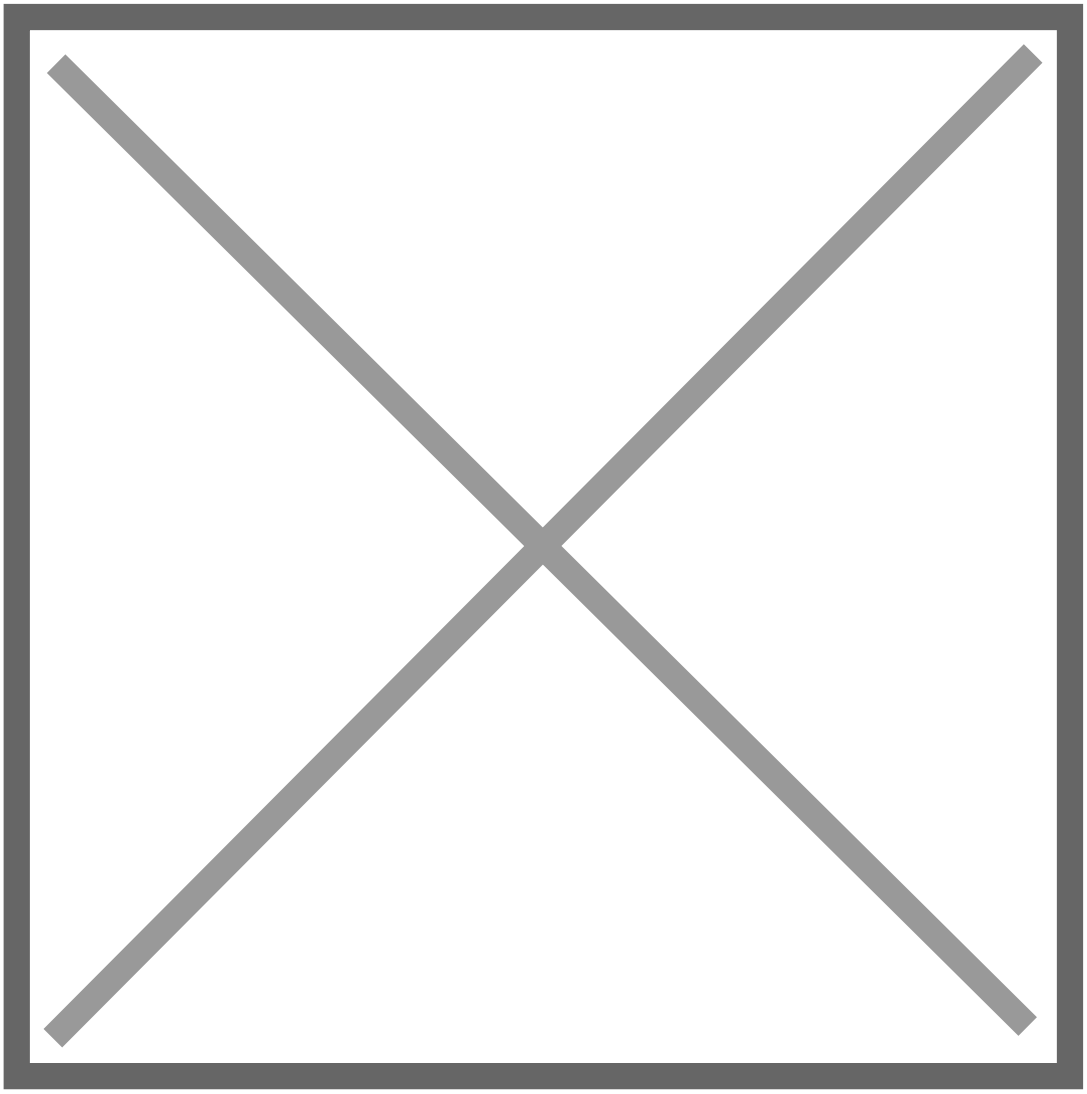


14. To add additional signers, Open Manage assignees.



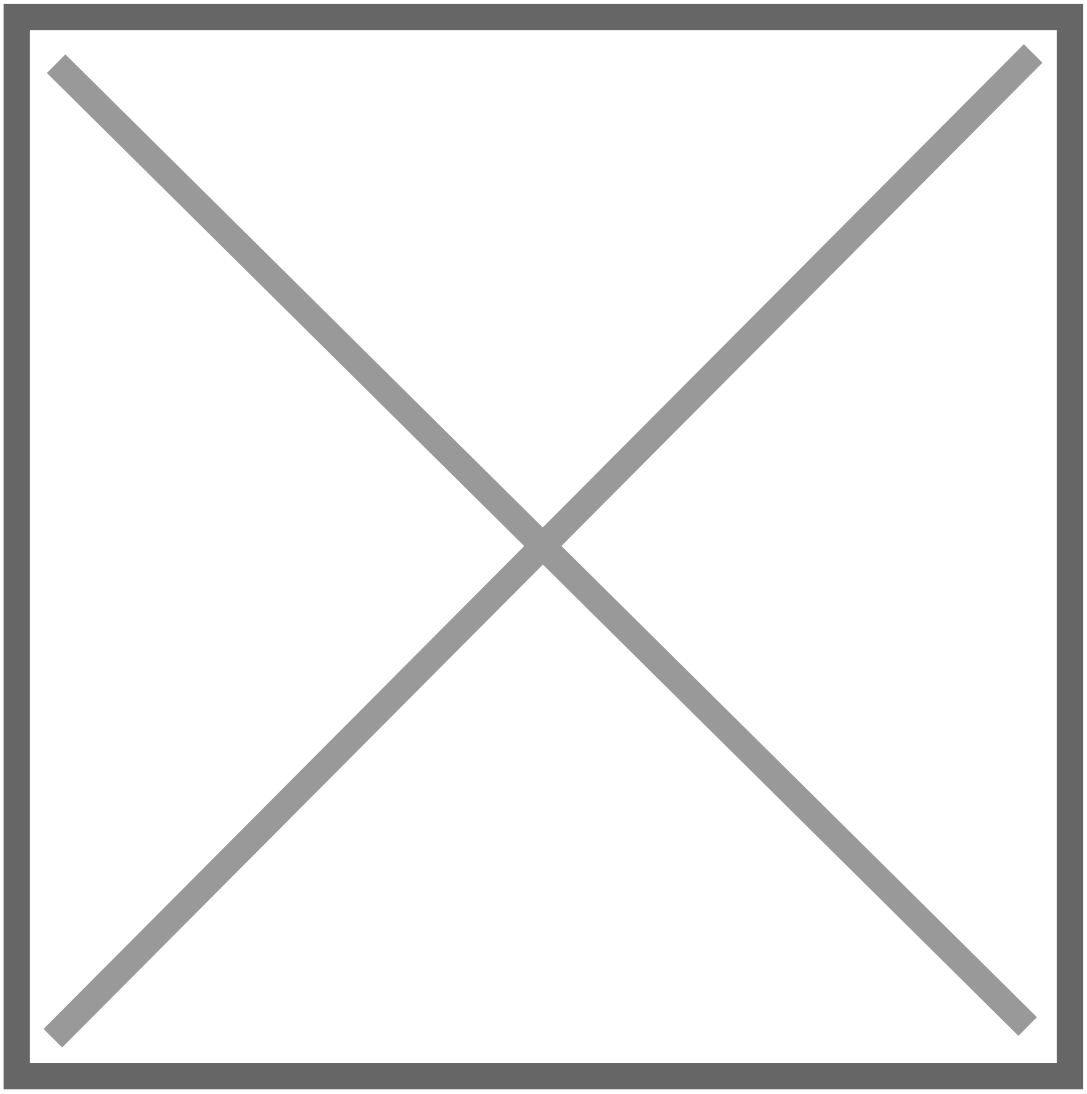
15. Create a signer for each person who needs to review or sign the document.

Click "Save"

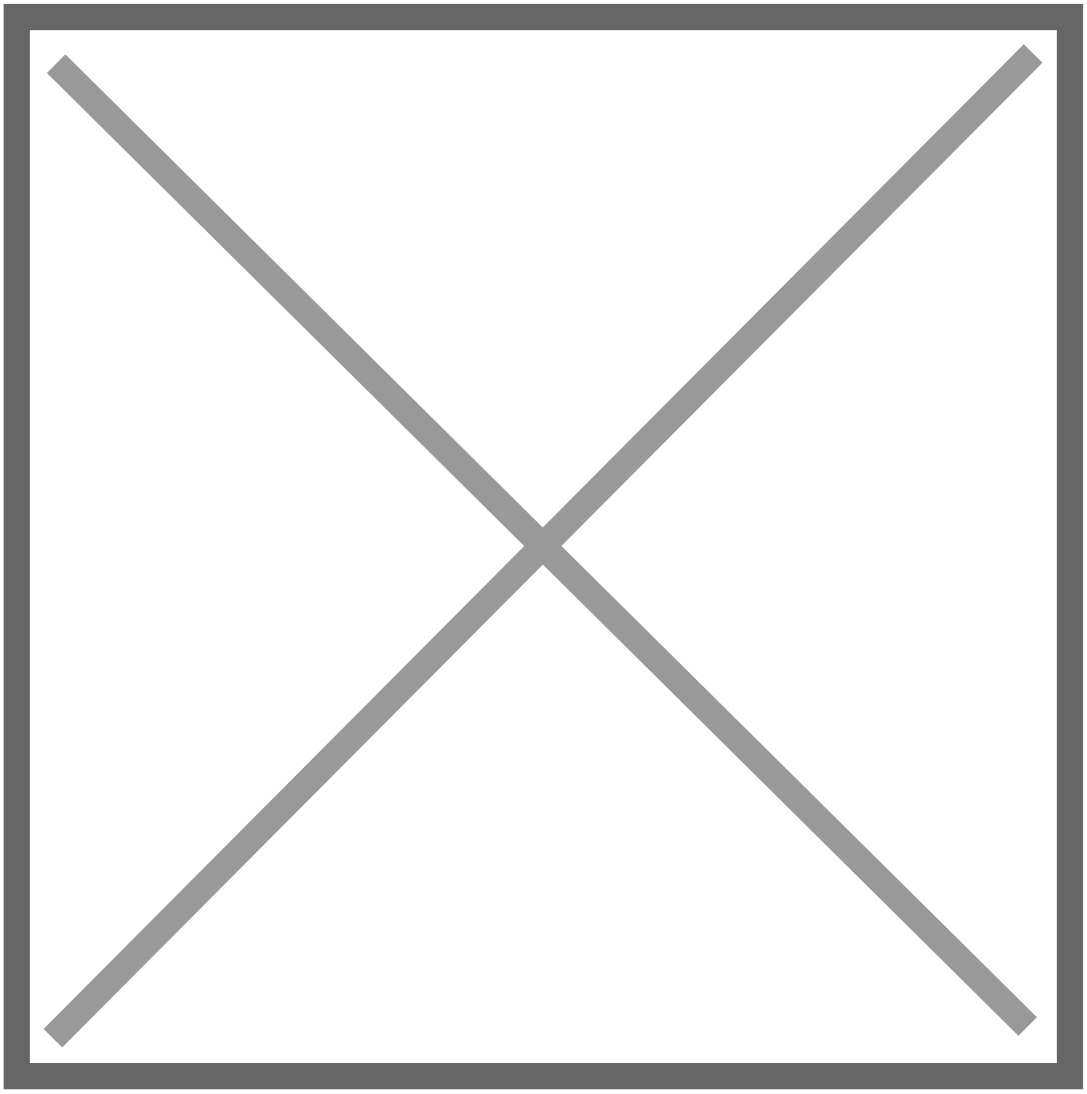


16. Make sure you select the correct "signer".

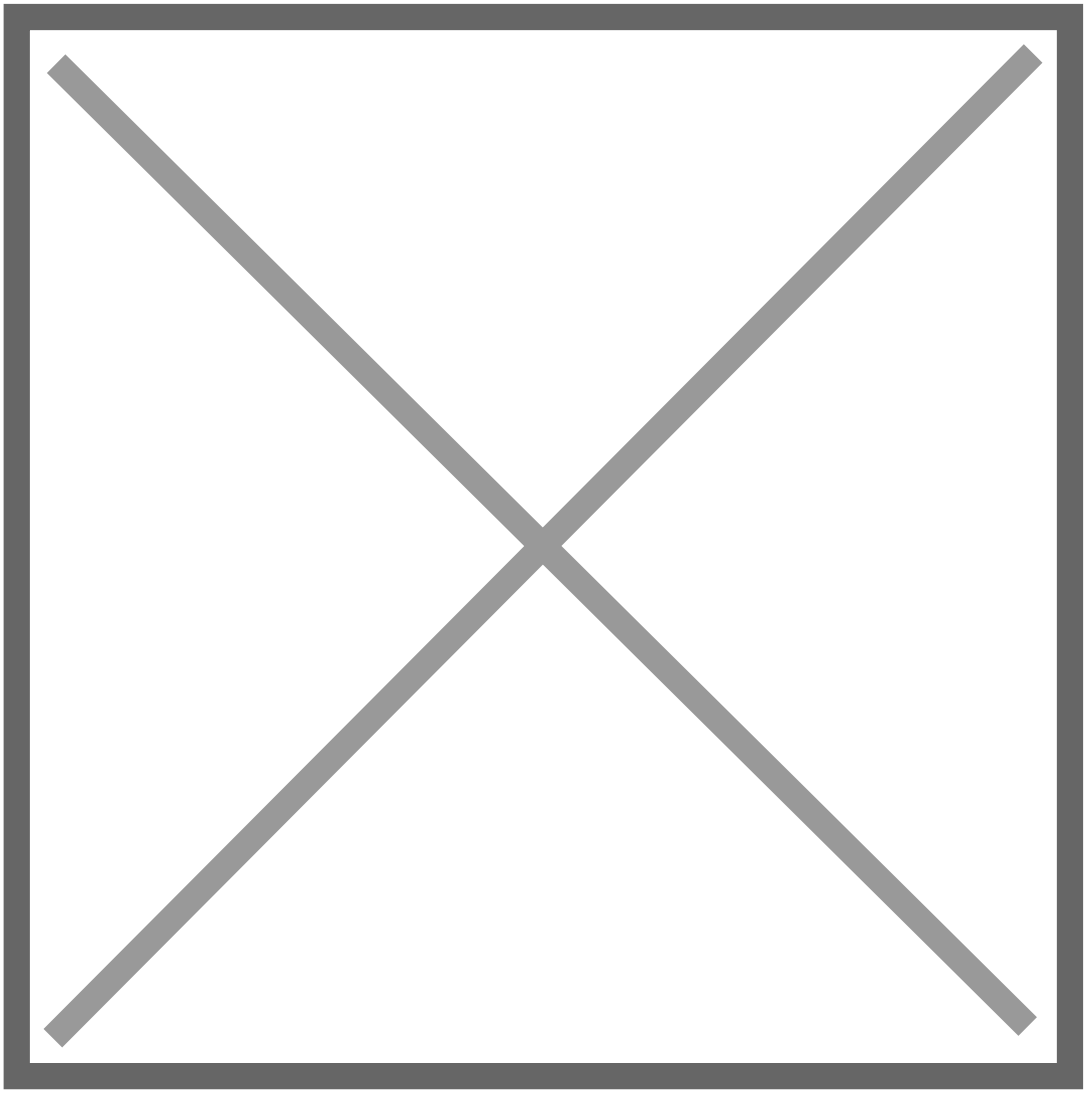
If signer 1 is supposed to fill out the form, select them first.



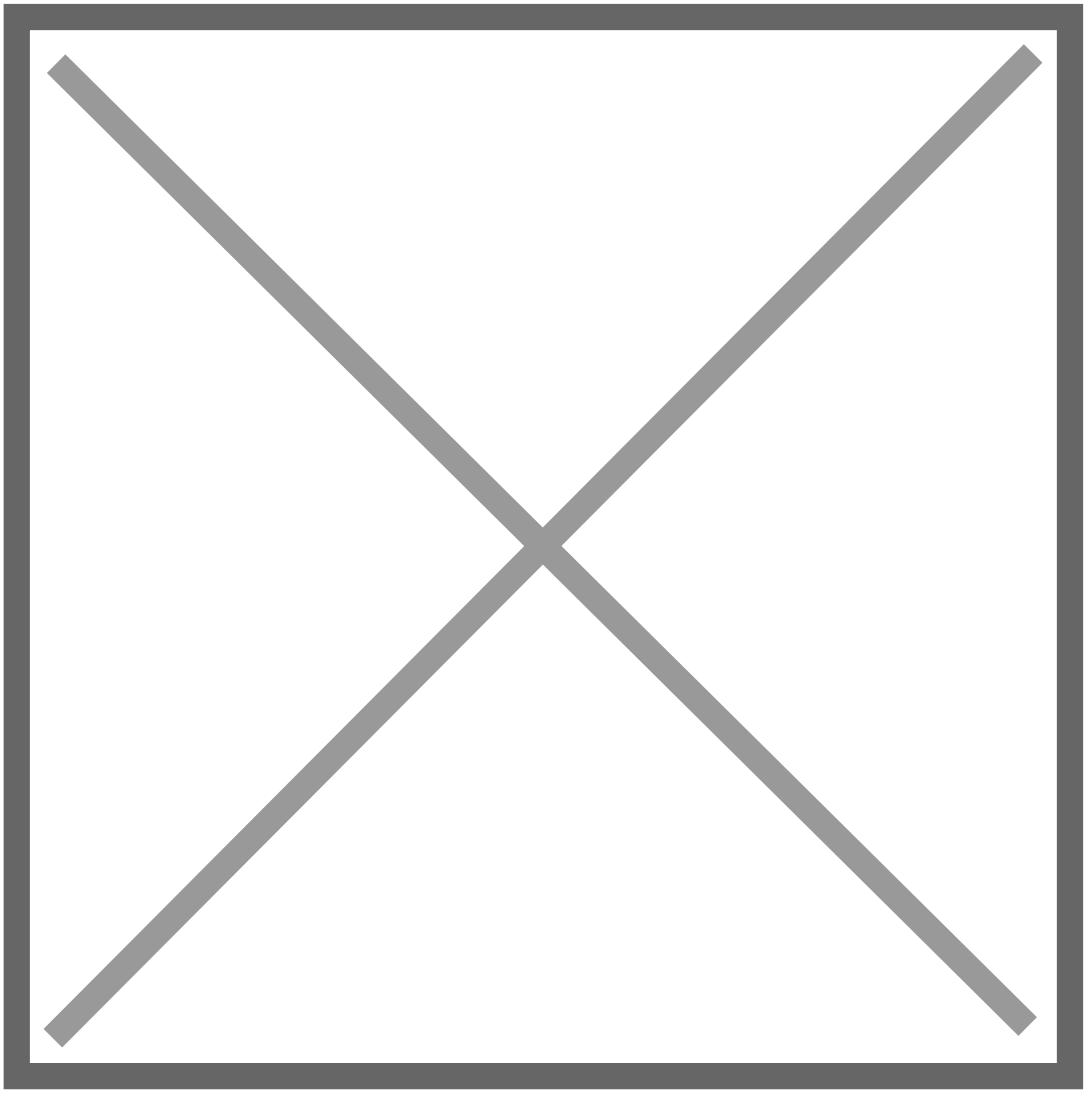
17. Drag over the fields that you need. You should size them appropriately.



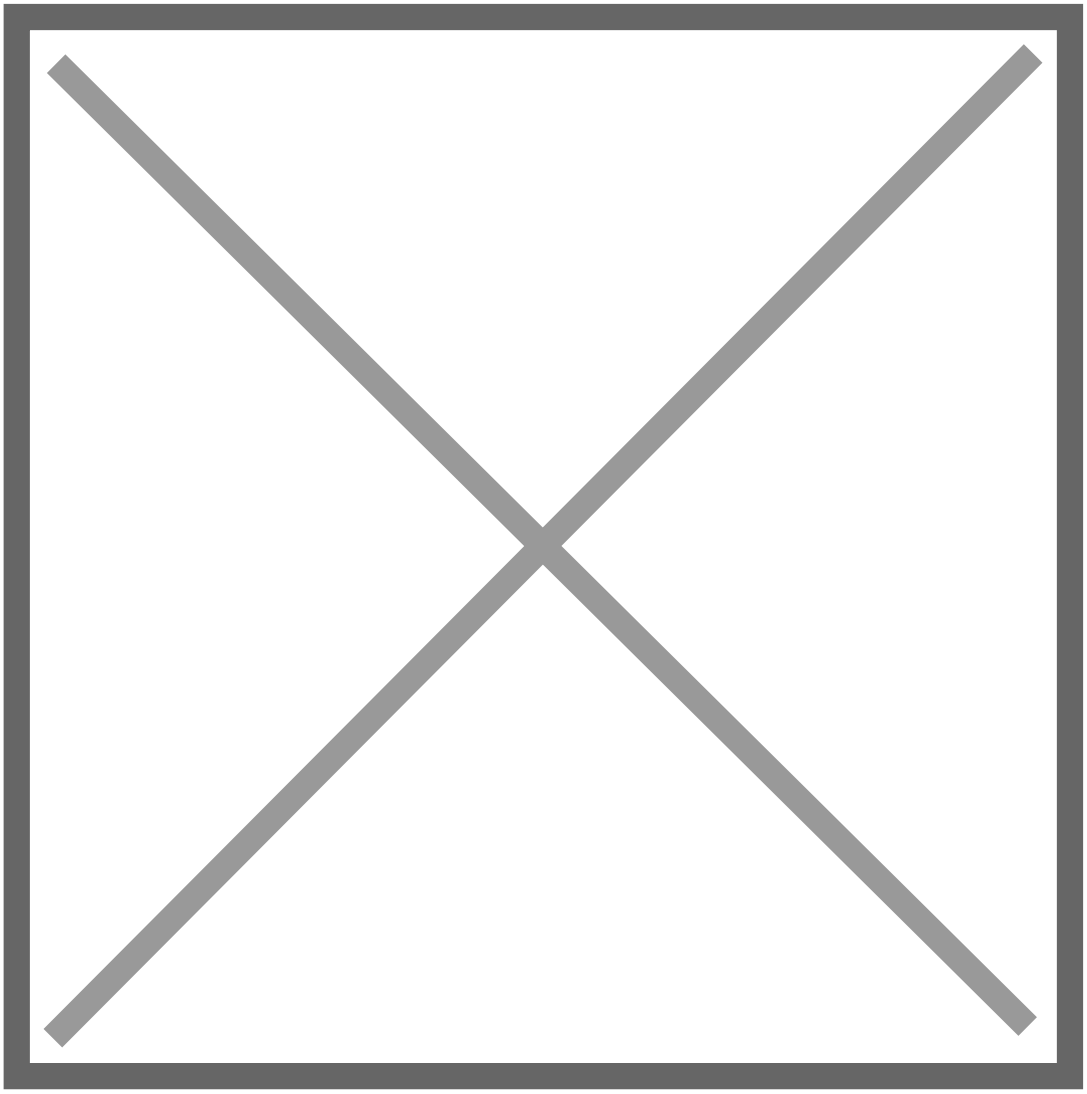
18. Open Field settings.



19. Click the Mark required toggle.

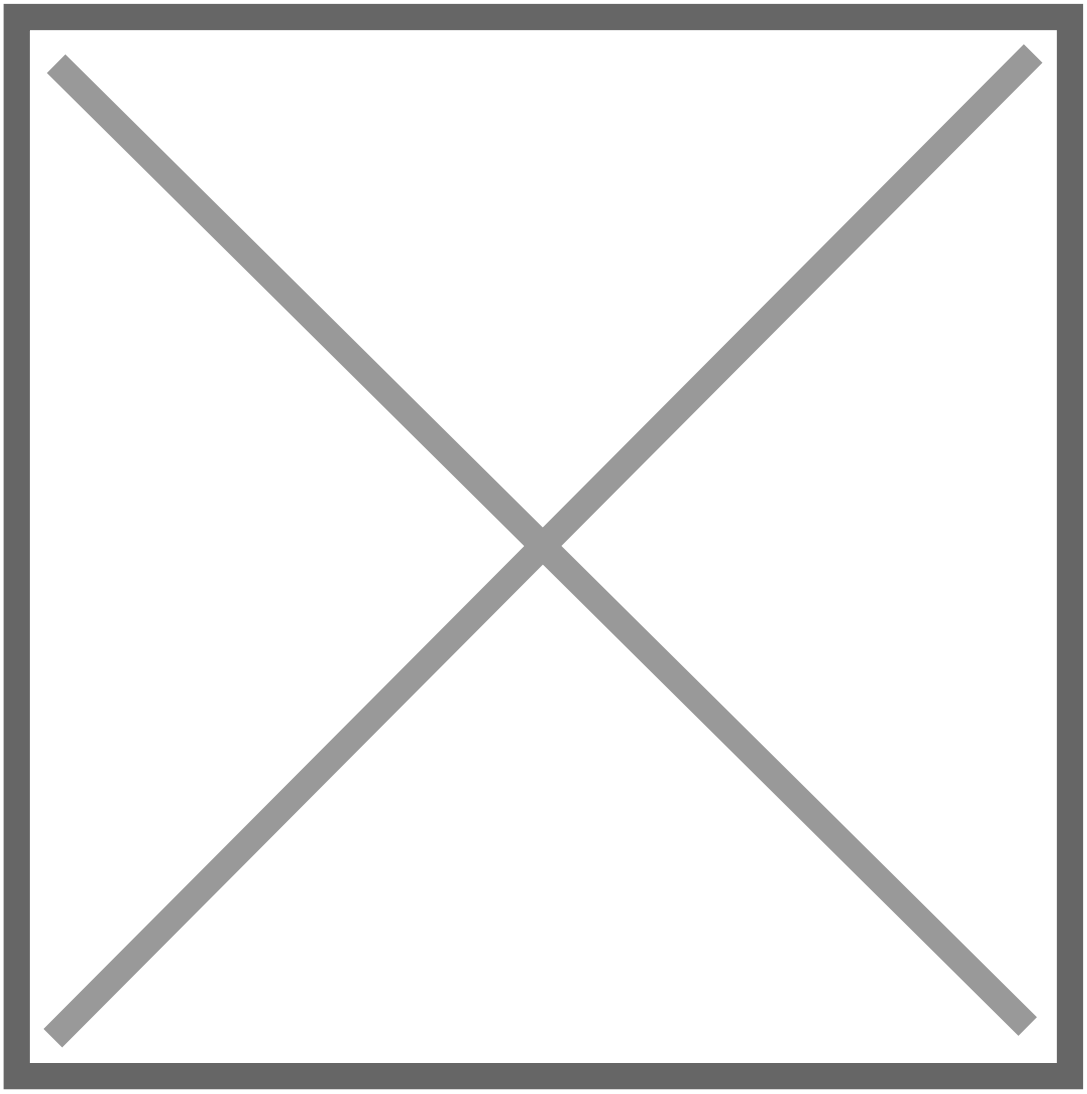


20. Return to the sign-field controls.

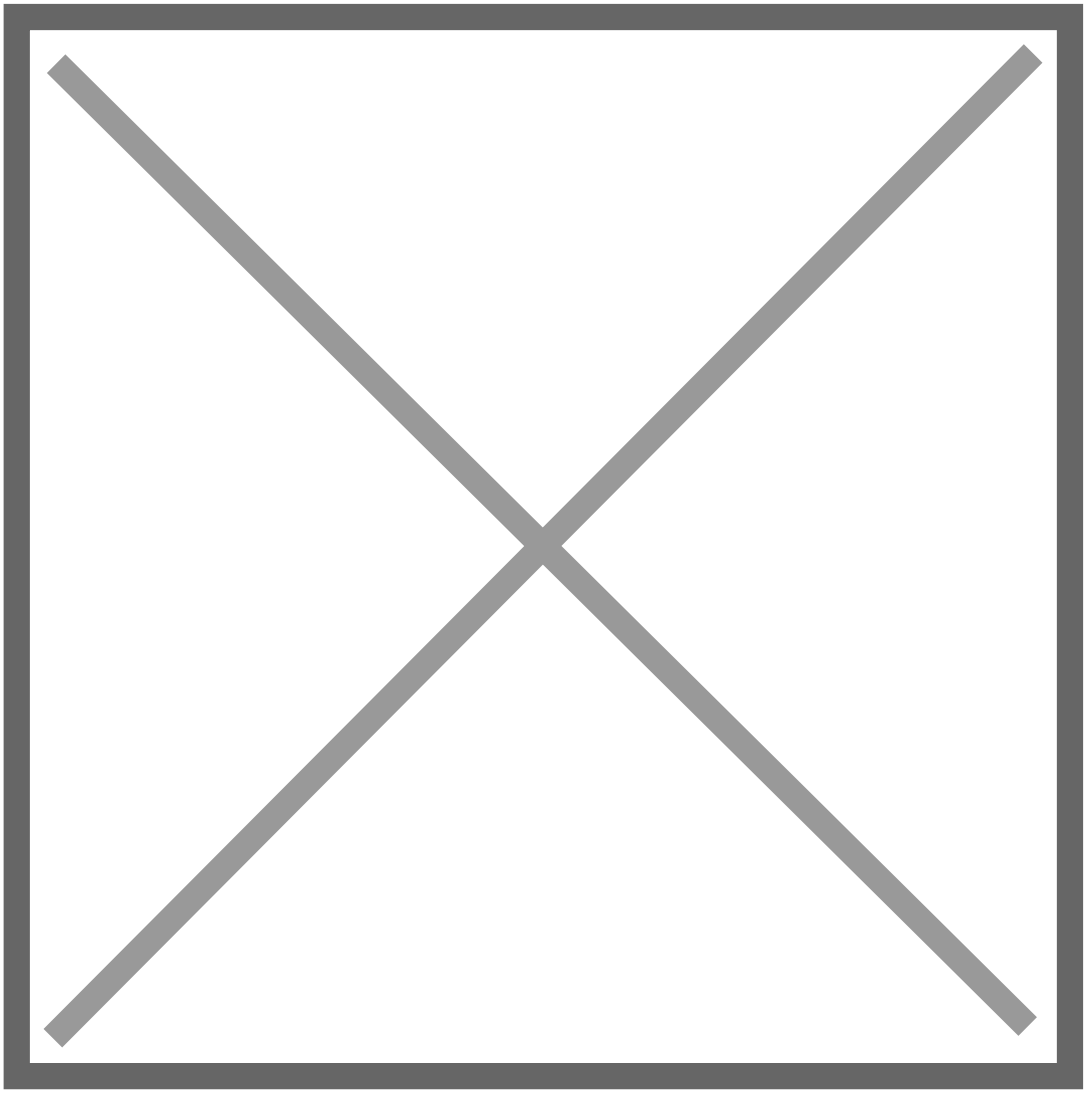


21. Drag "Text" over to the areas you need information for, such as student email or phone number.

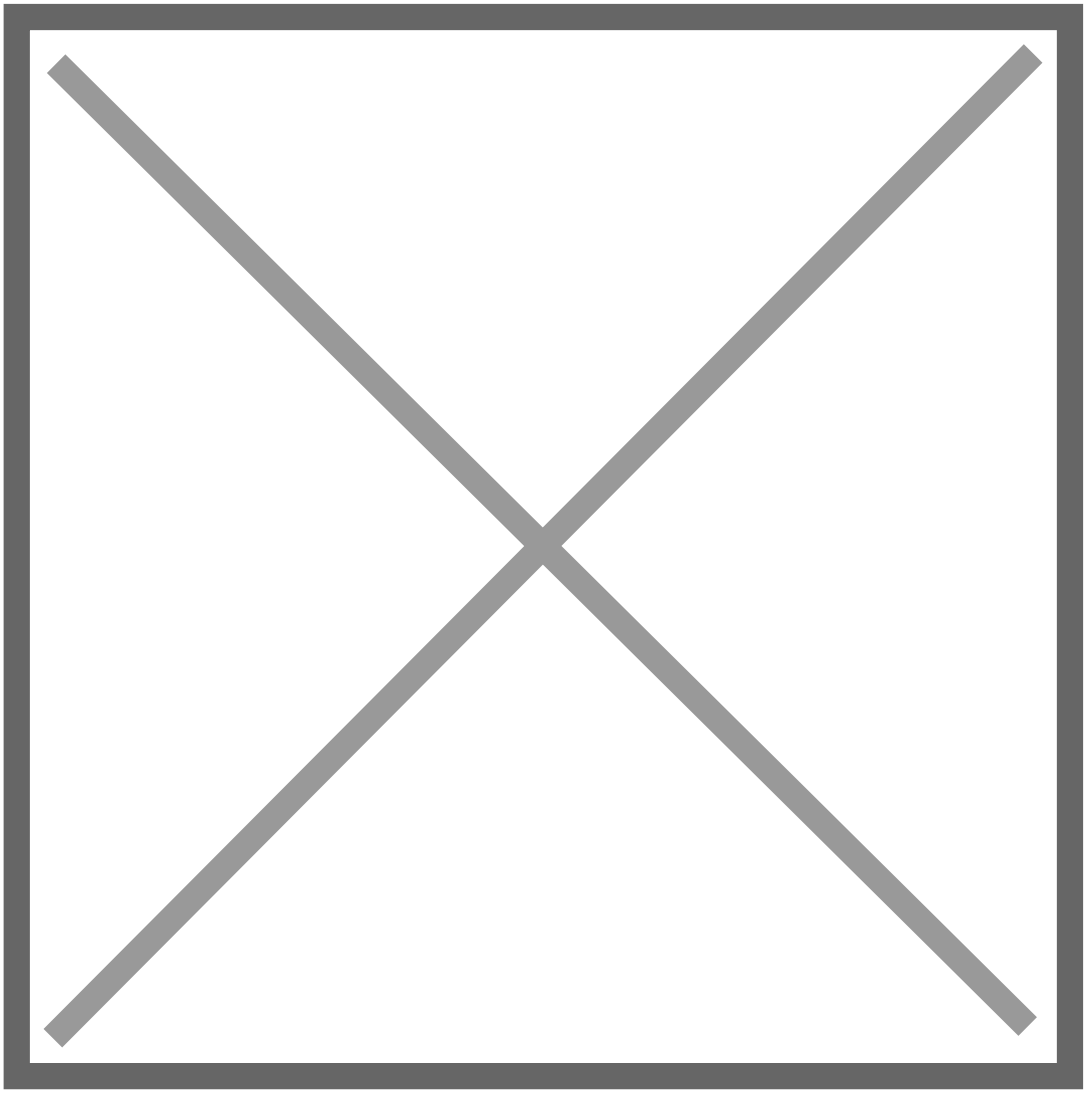
Label your fields; it will help during the sign step. If a text field is to collect an email, name it email.



22. Click the Mark required toggle anytime something has to be done before continuing.

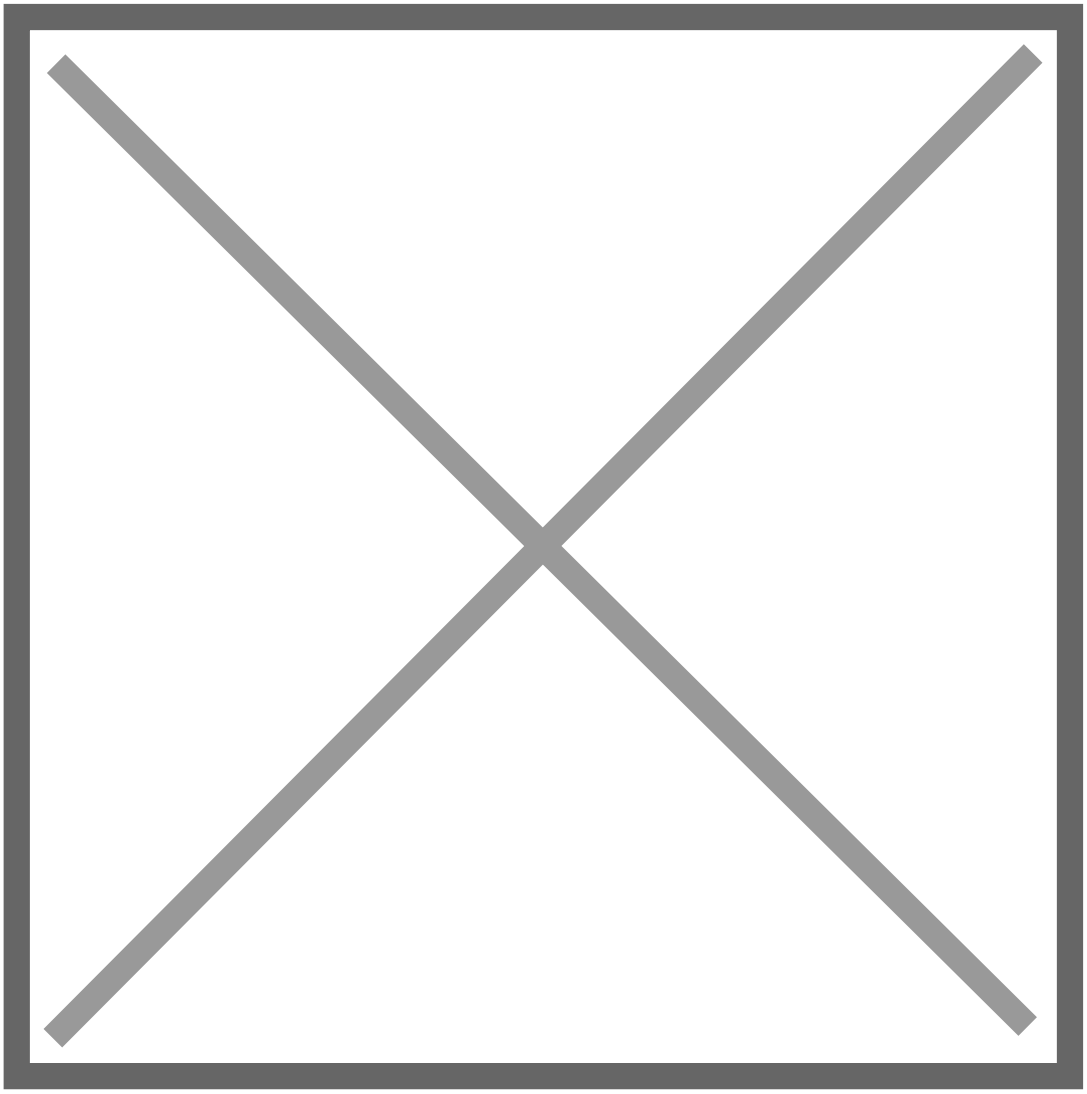


23. Return to the sign-field controls.

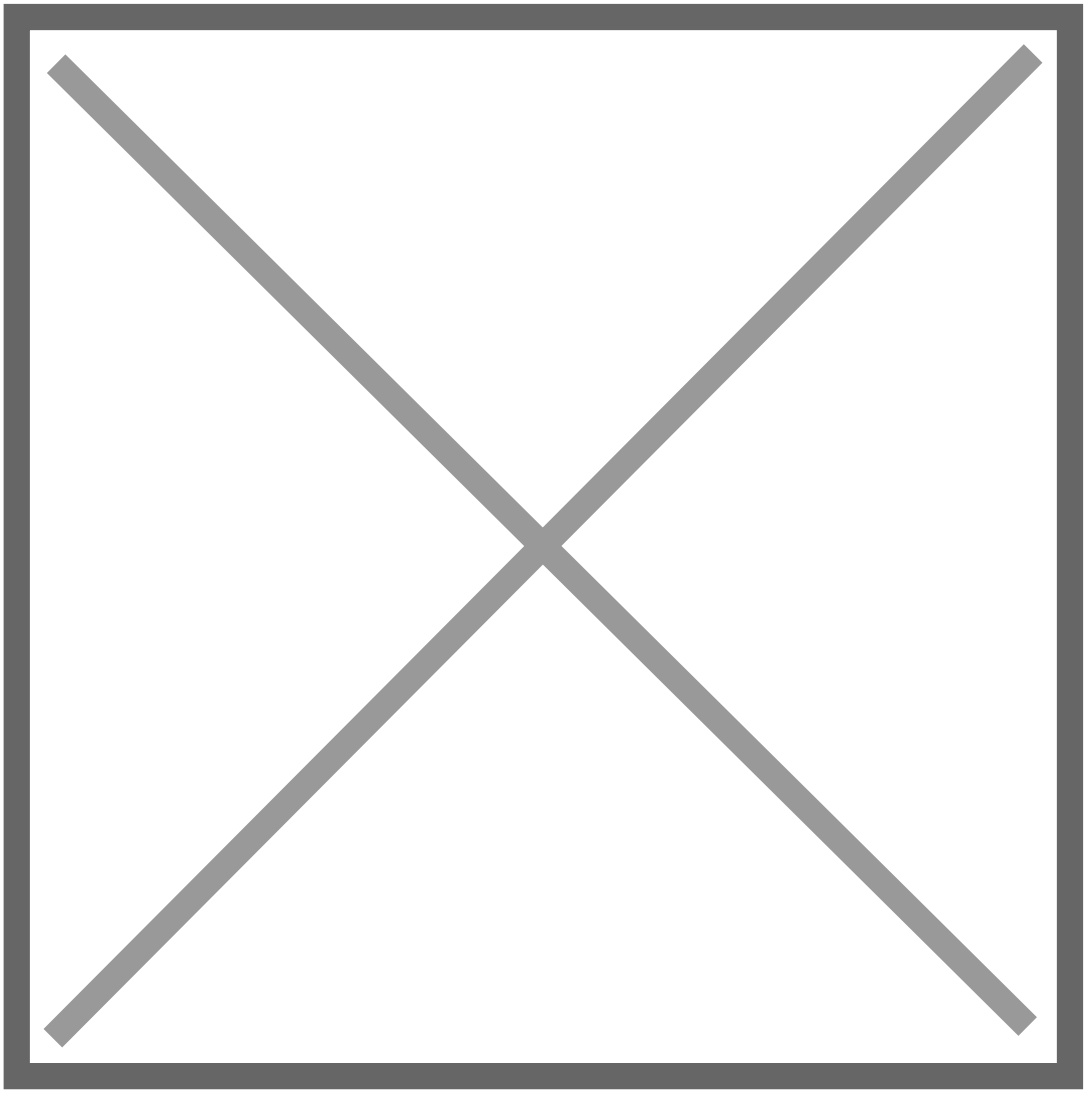


24. If you need checkboxes as an option, move over 1 checkbox field.

(Not 3 in this example)

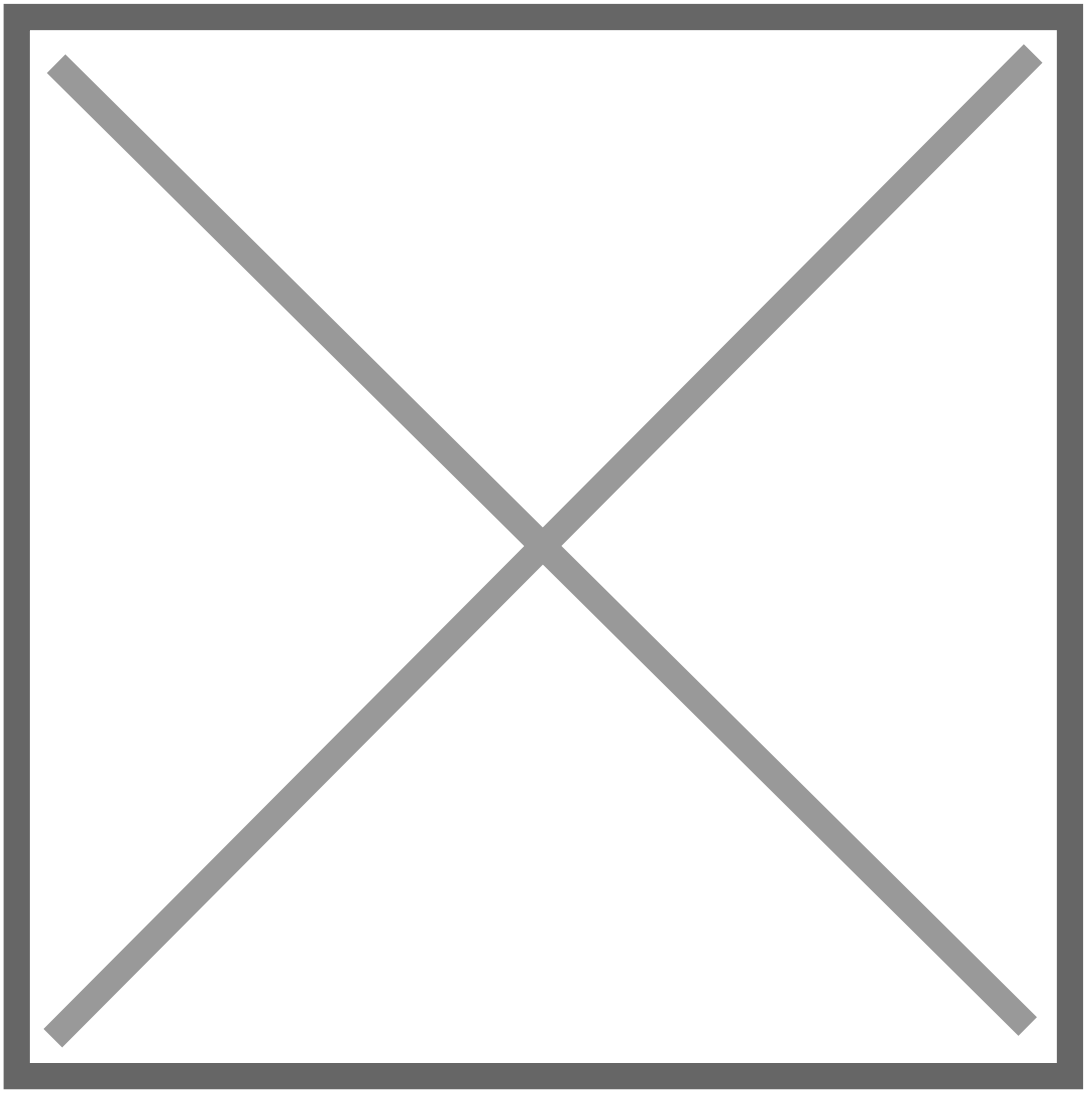


25. Place the checkbox on the document and size it. Once you click away from the box, you can drag it around easily.

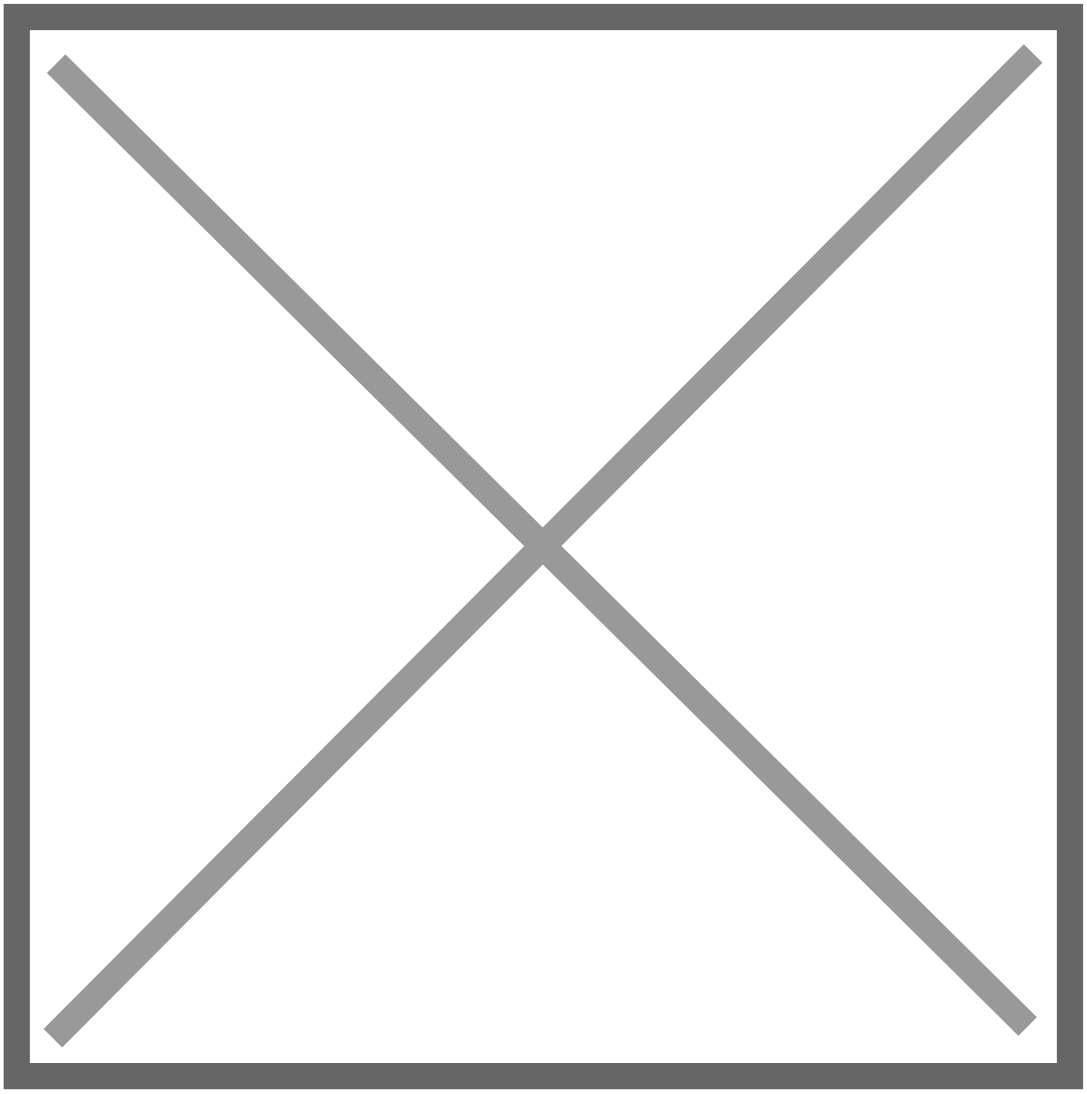


26. For the additional checkbox options, add them in the "Field Settings".

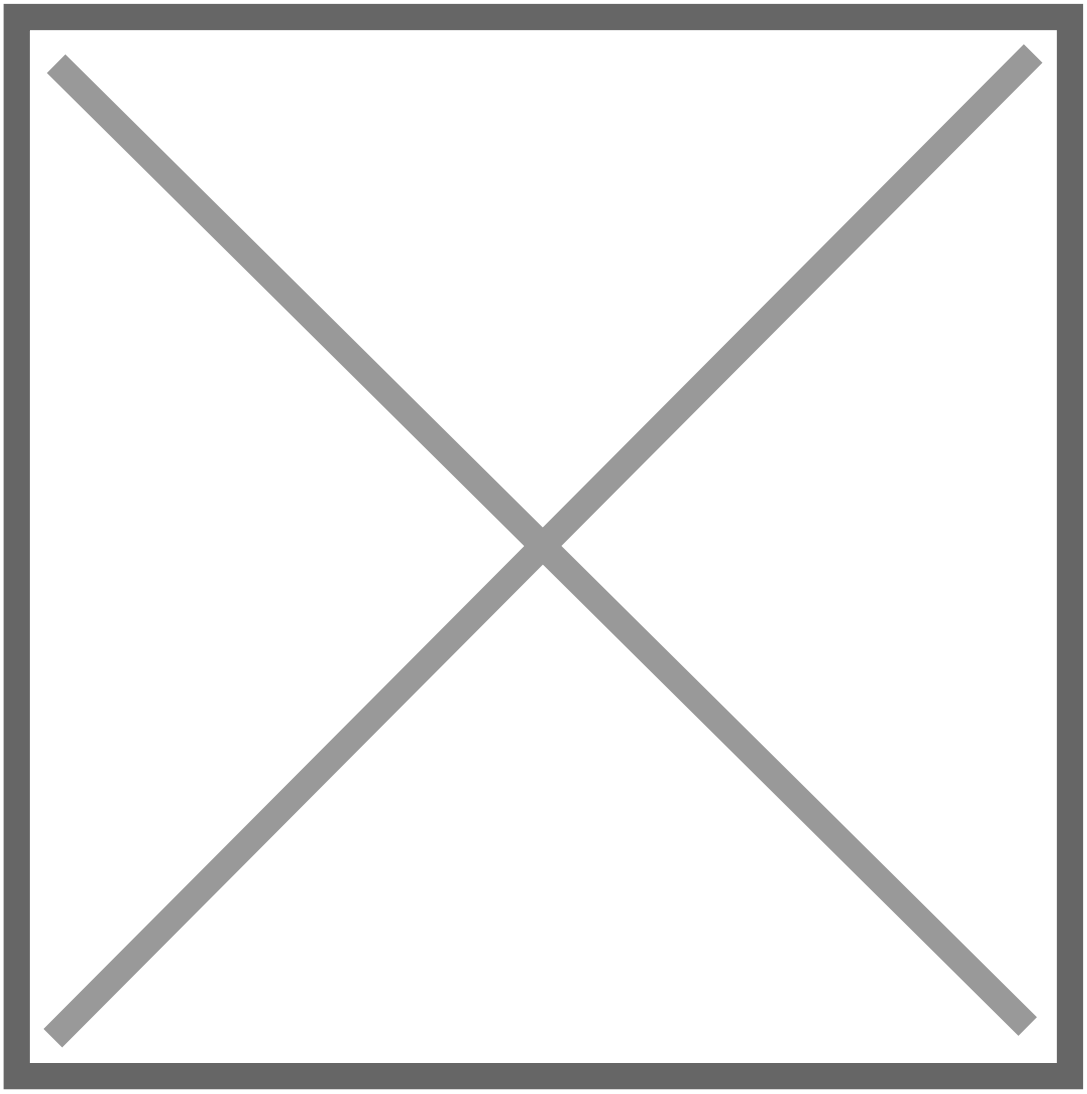
While you can drag over multiple checkbox fields, the aforementioned method is recommended per question/section. It helps with data collecting on other steps.



27. Name all of the options.

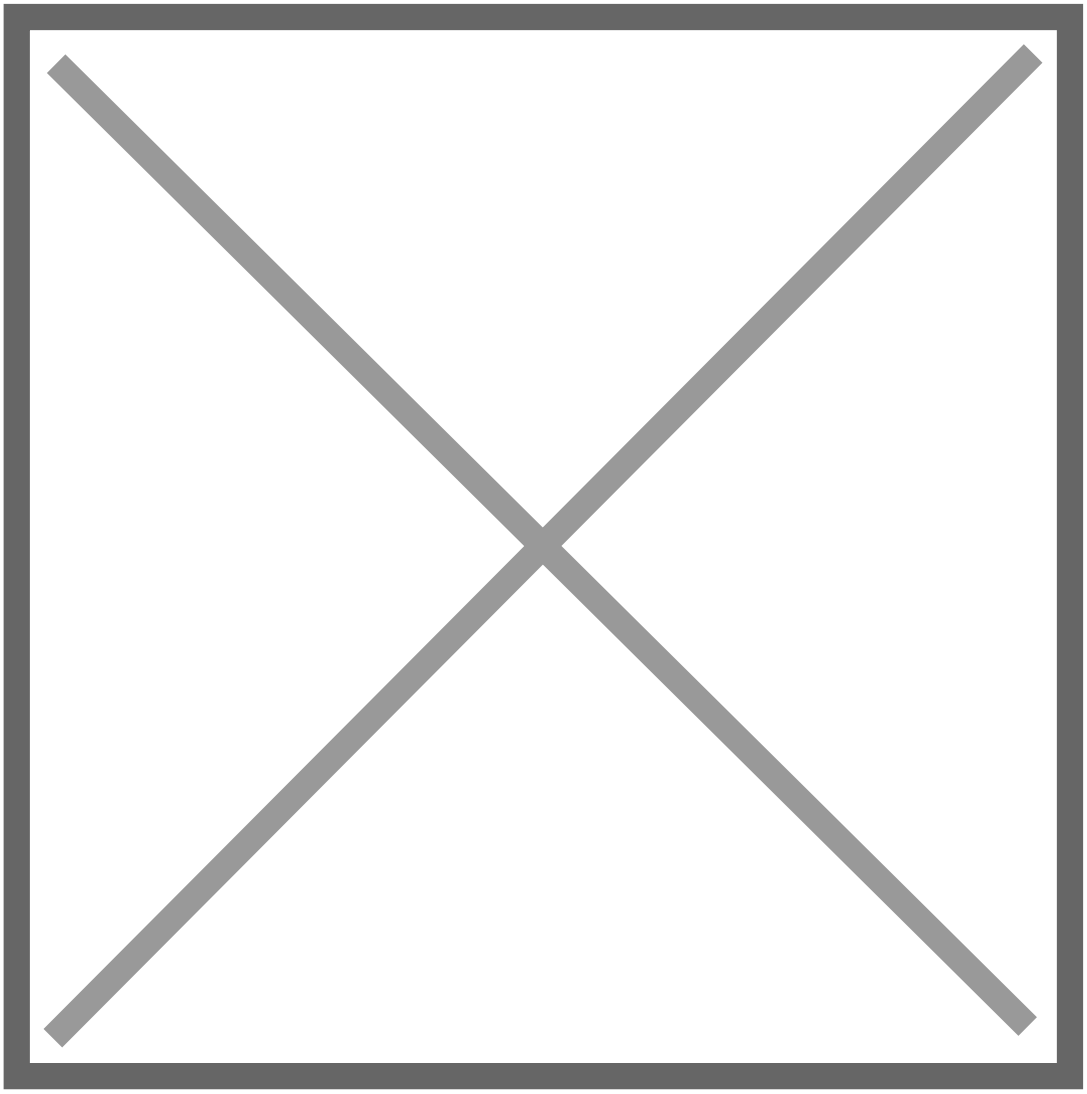


28. Click away from the checkbox, then drag it to the applicable location.



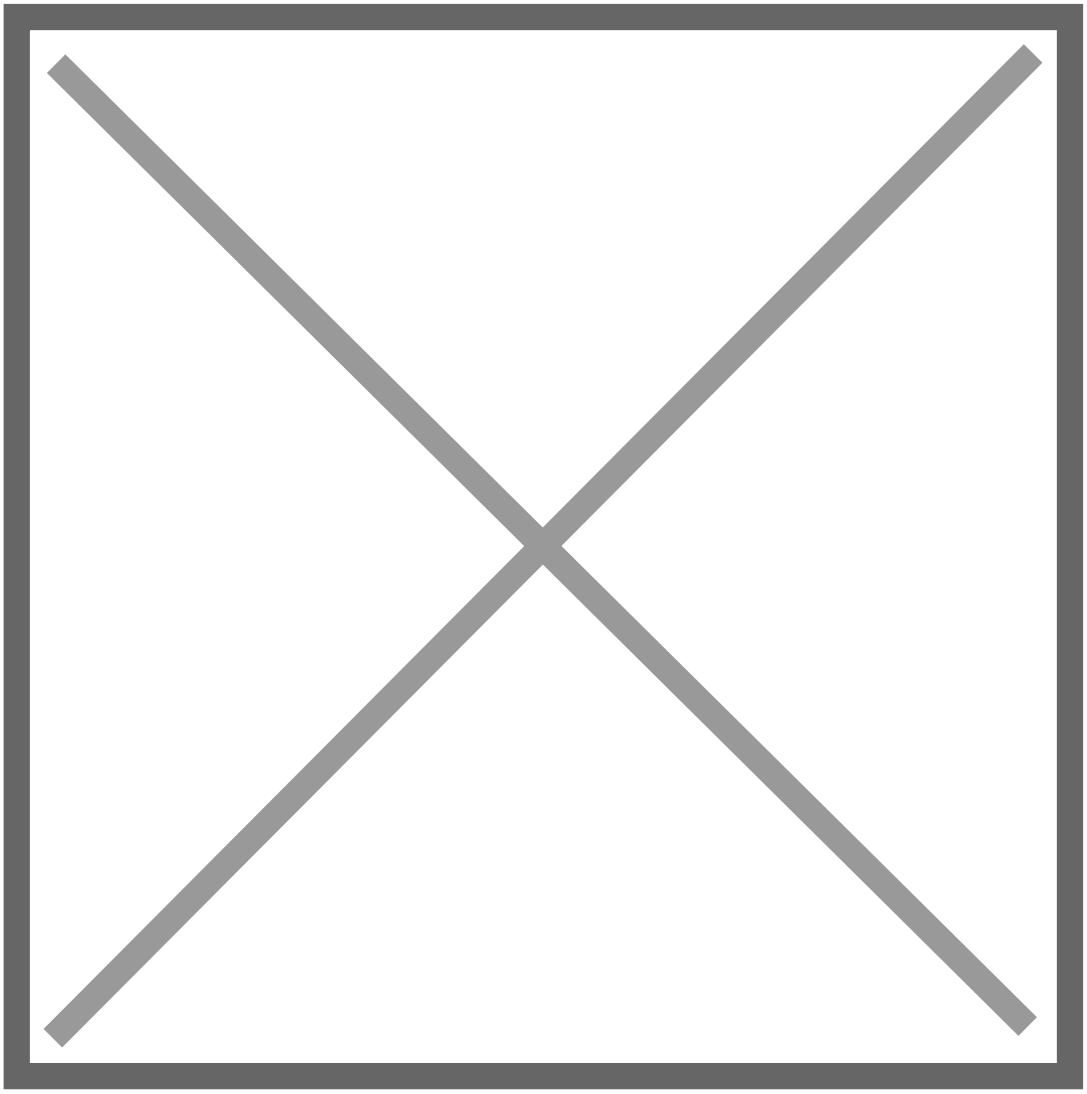
29. Click Signature.

Be sure you select the correct signer for the field you need.

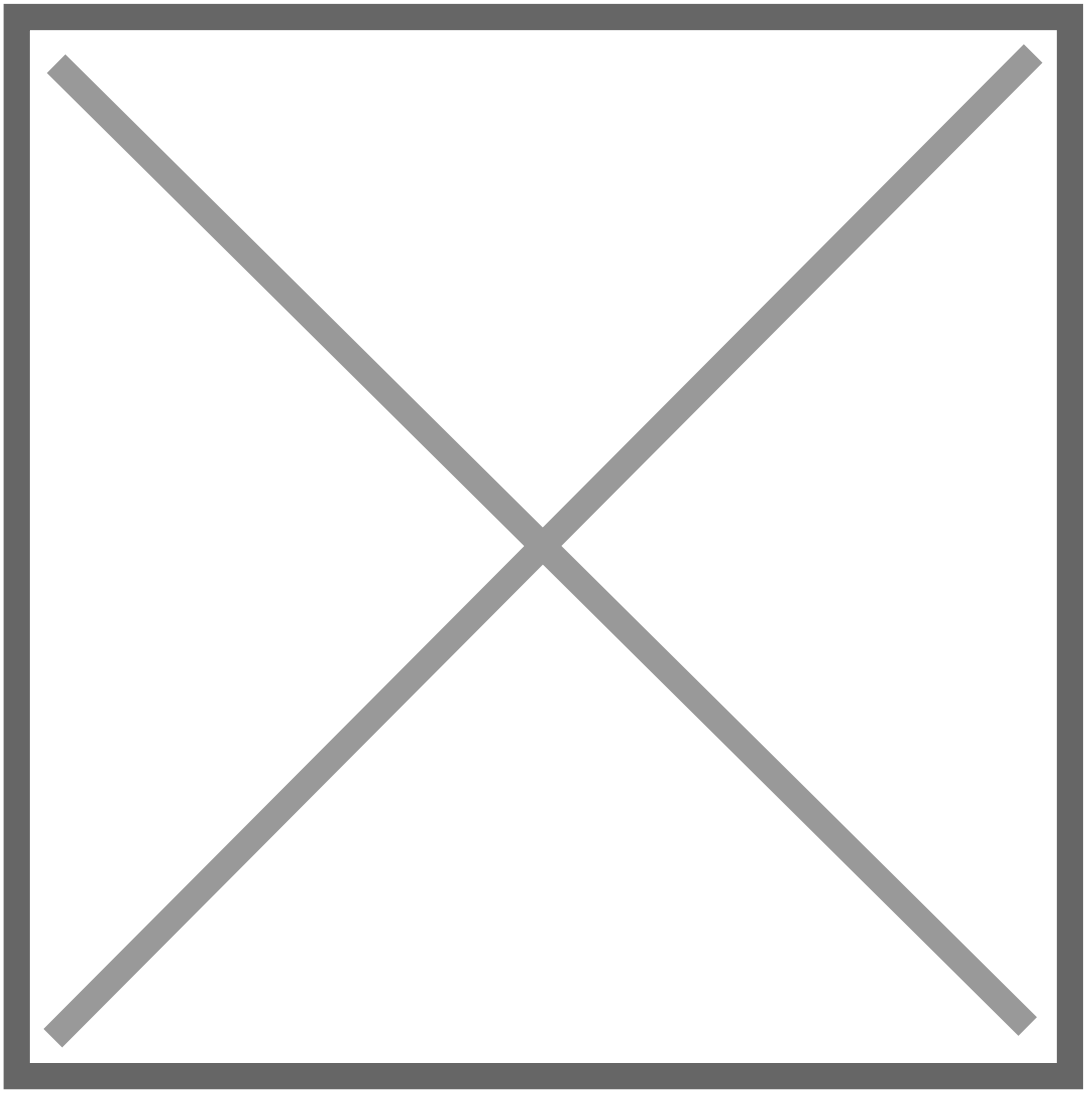


30. Place the signature field on the Student line. You can drag and drop onto PDFs and DOCX. If it is a DOCX, you can also click and place it where your cursor is.

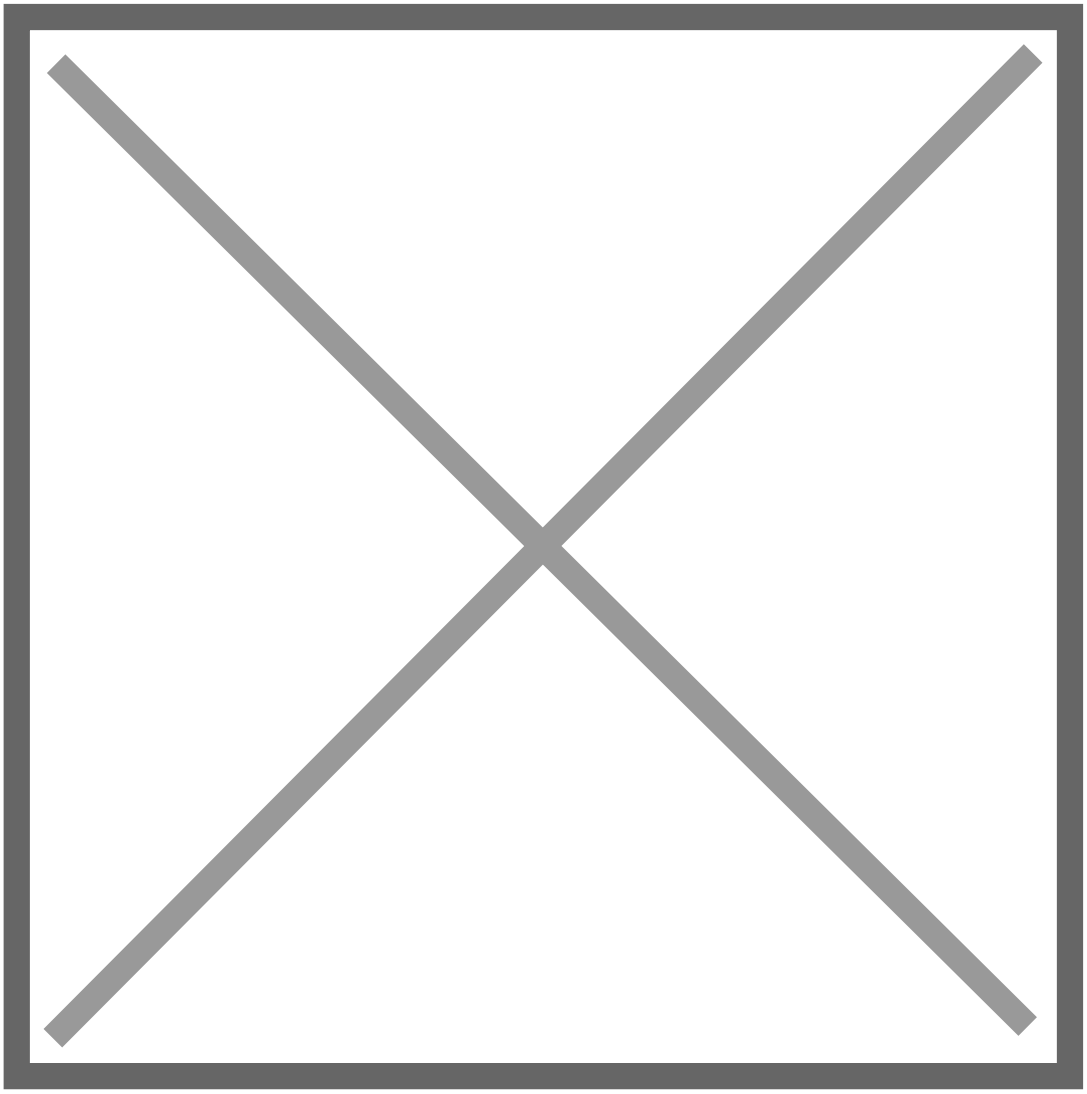
Size the field appropriately



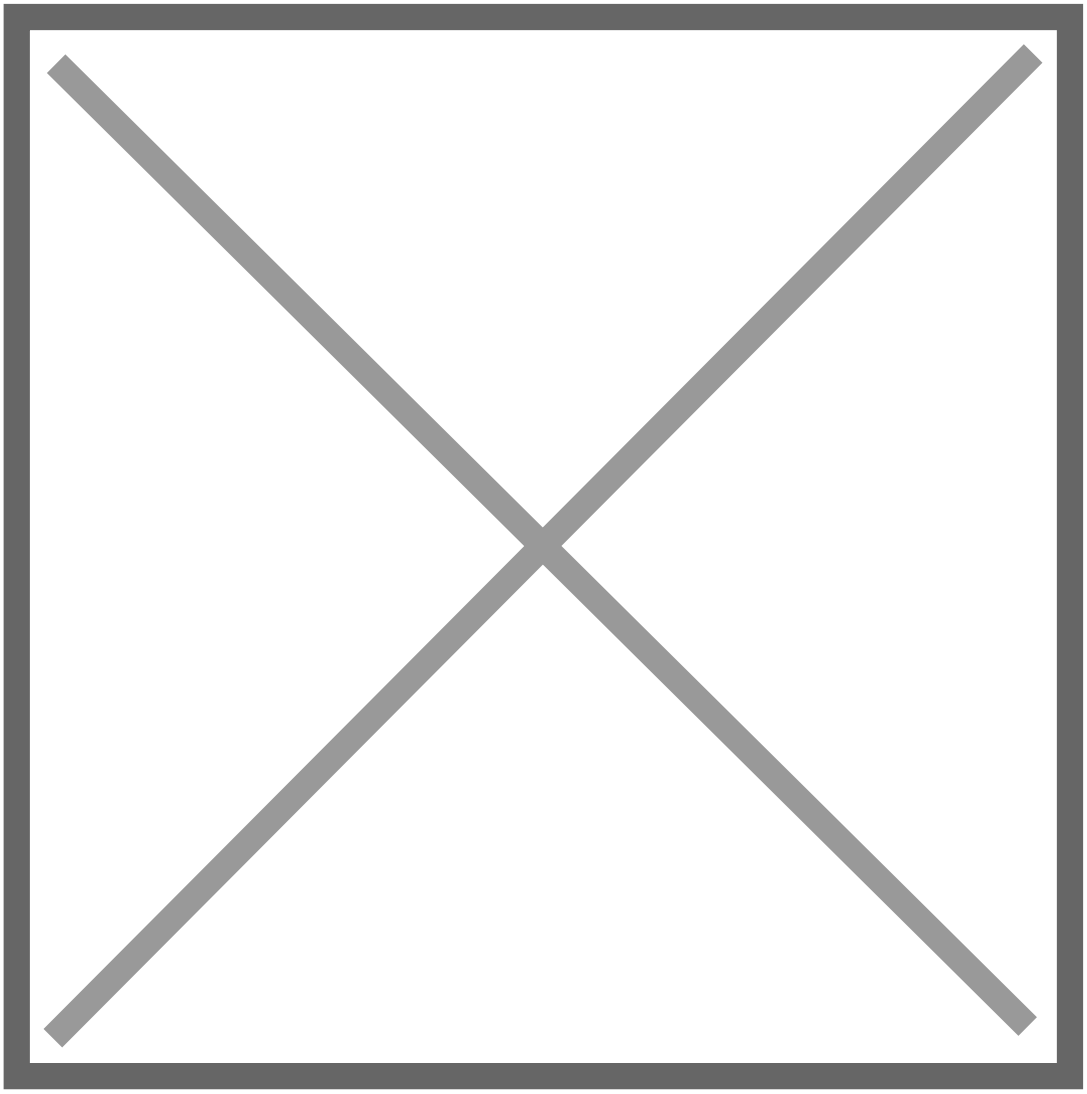
31. Place all fields needed for each participant.



32. Close the document editor.

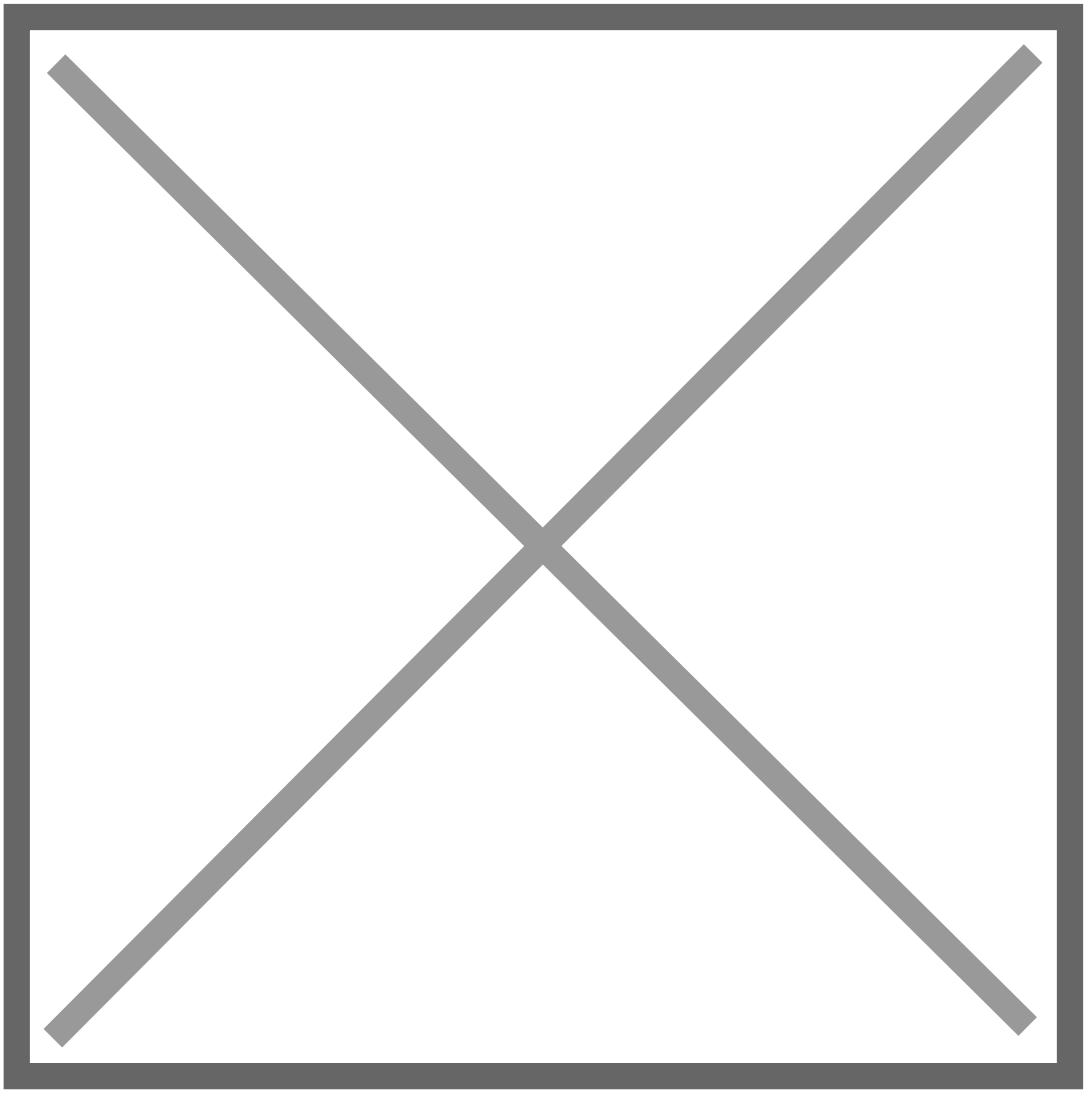


33. Click this icon.

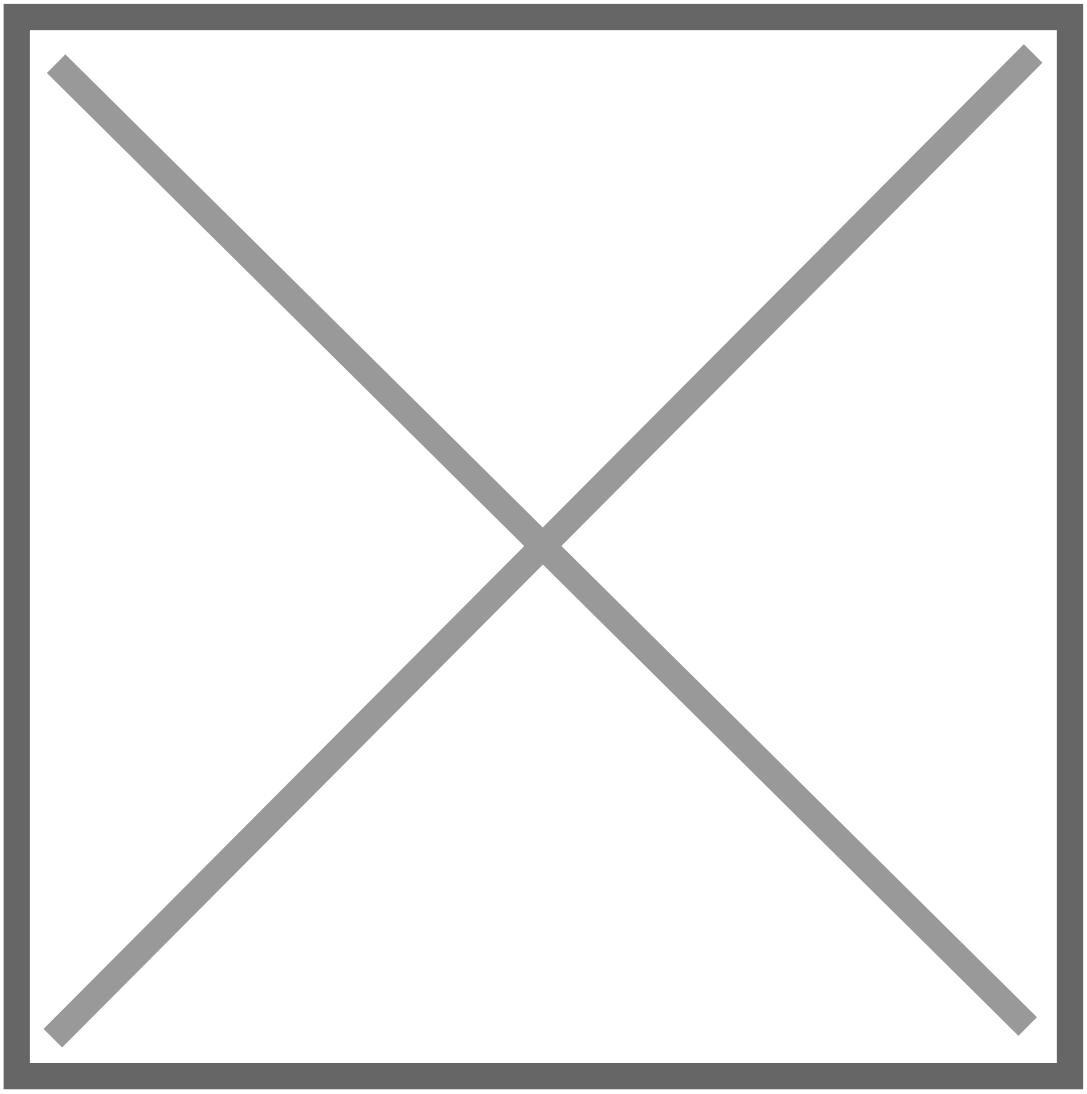


Workflow Steps

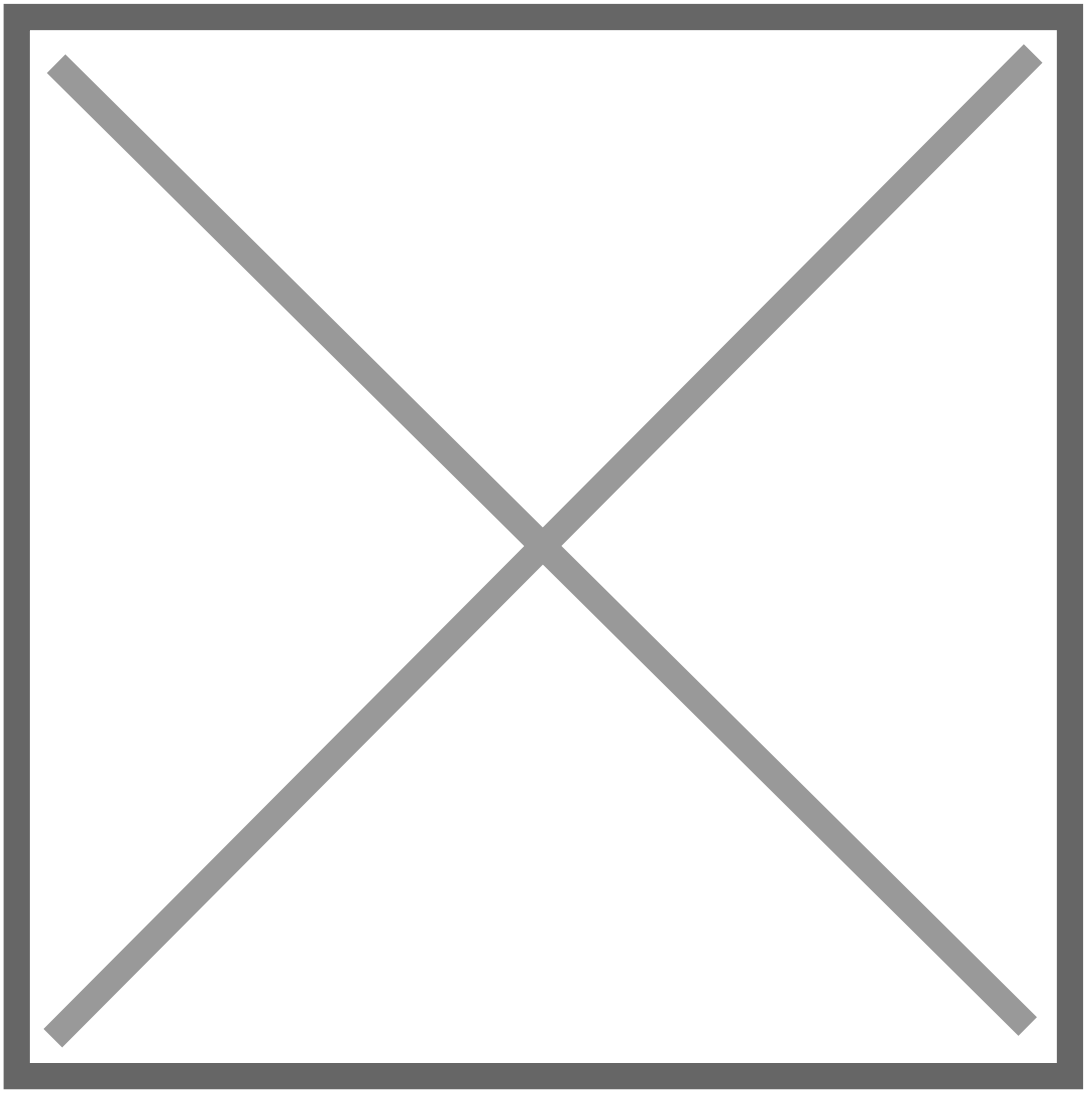
34. Open the workflow step picker.



35. Select Sign.



36. Open the Assignments tab.

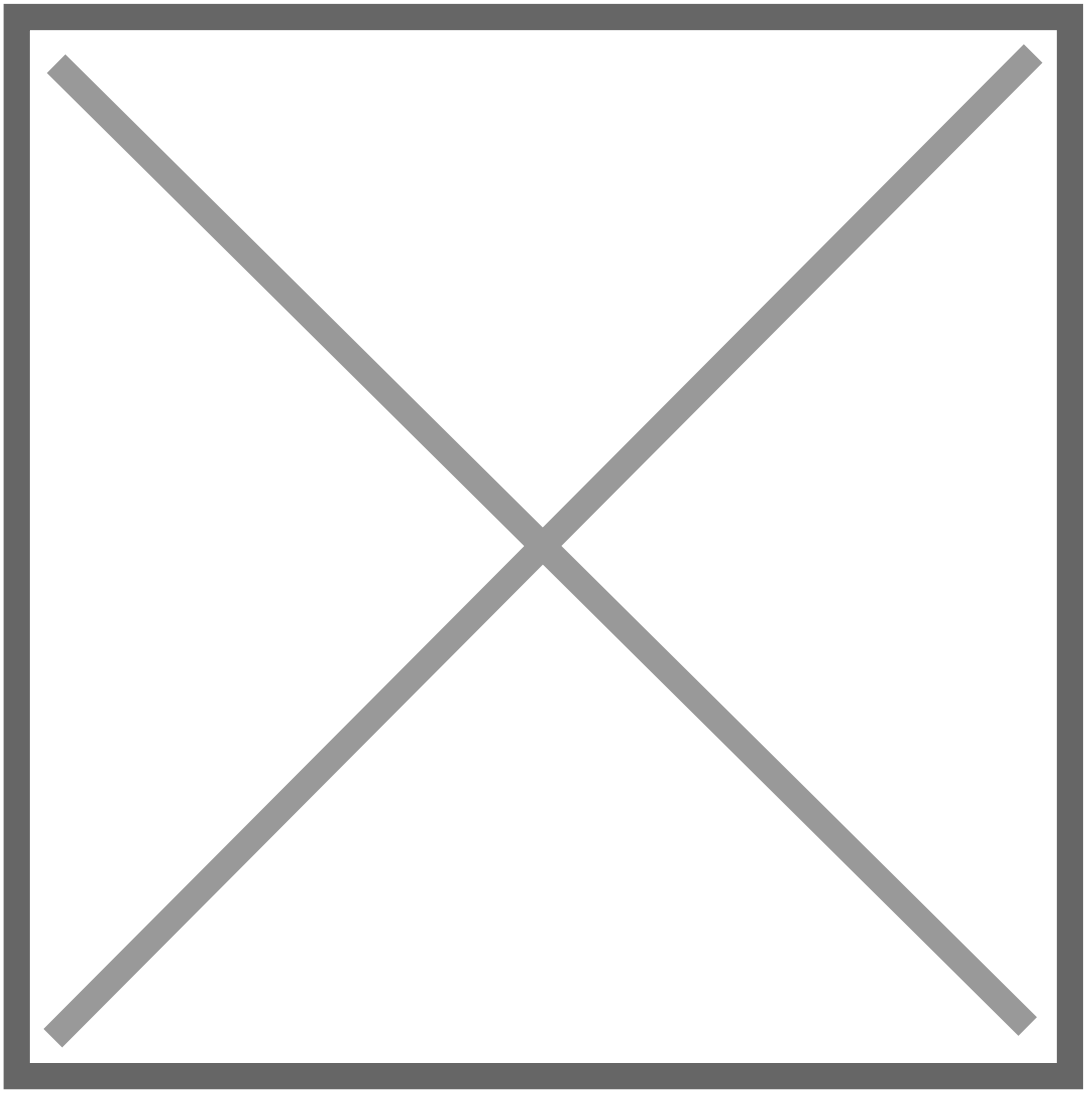


37. Select Email as the assignment method.

If the person filling out the document needs to be the one to sign it, keep their "Assign via" set to "From previous step".

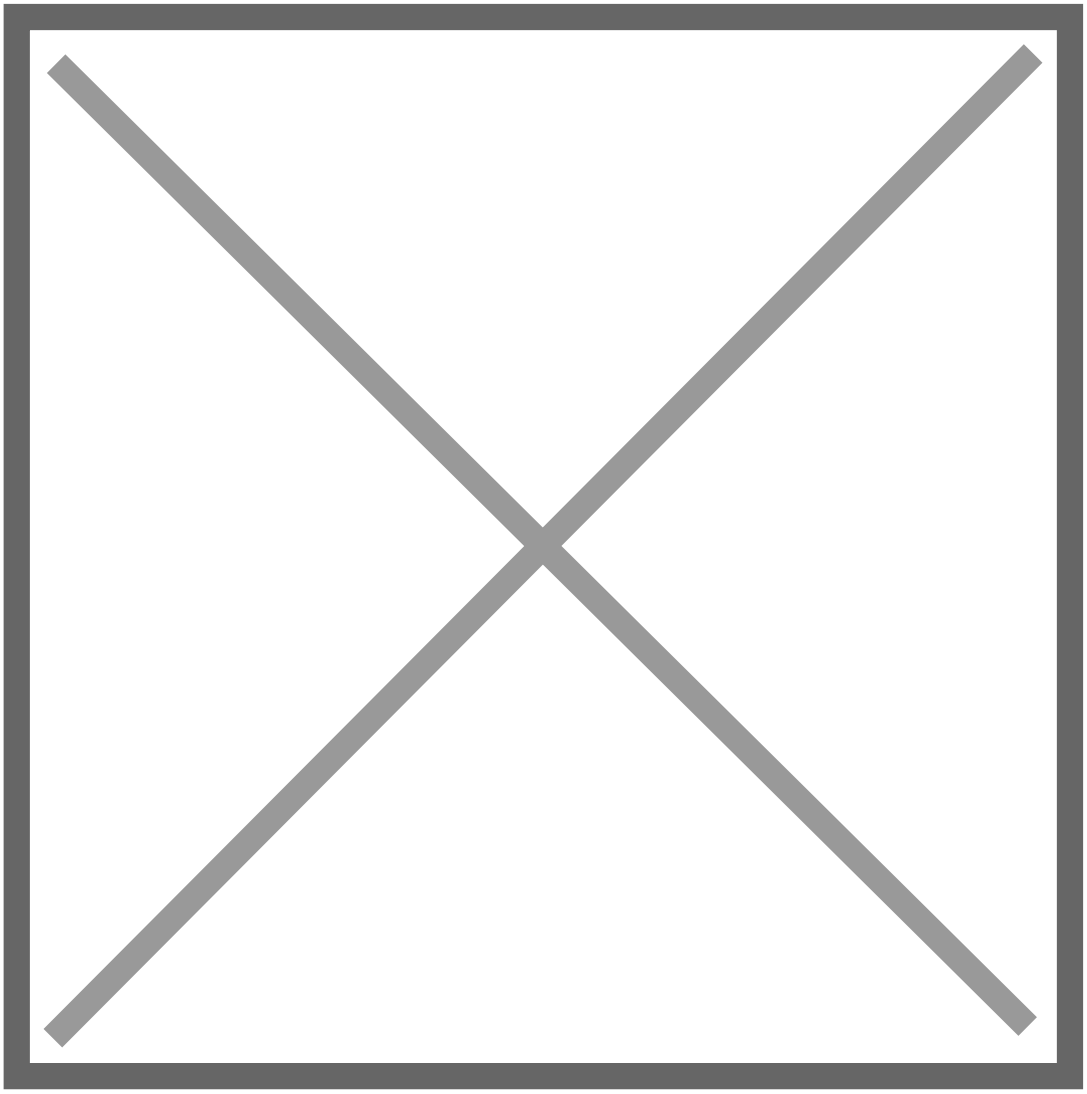
Other signers will need to be switched to "Email".

If you select the default "With Signer 1" option, after Signer 1 submits, they will be asked to input the email address of the next signer.

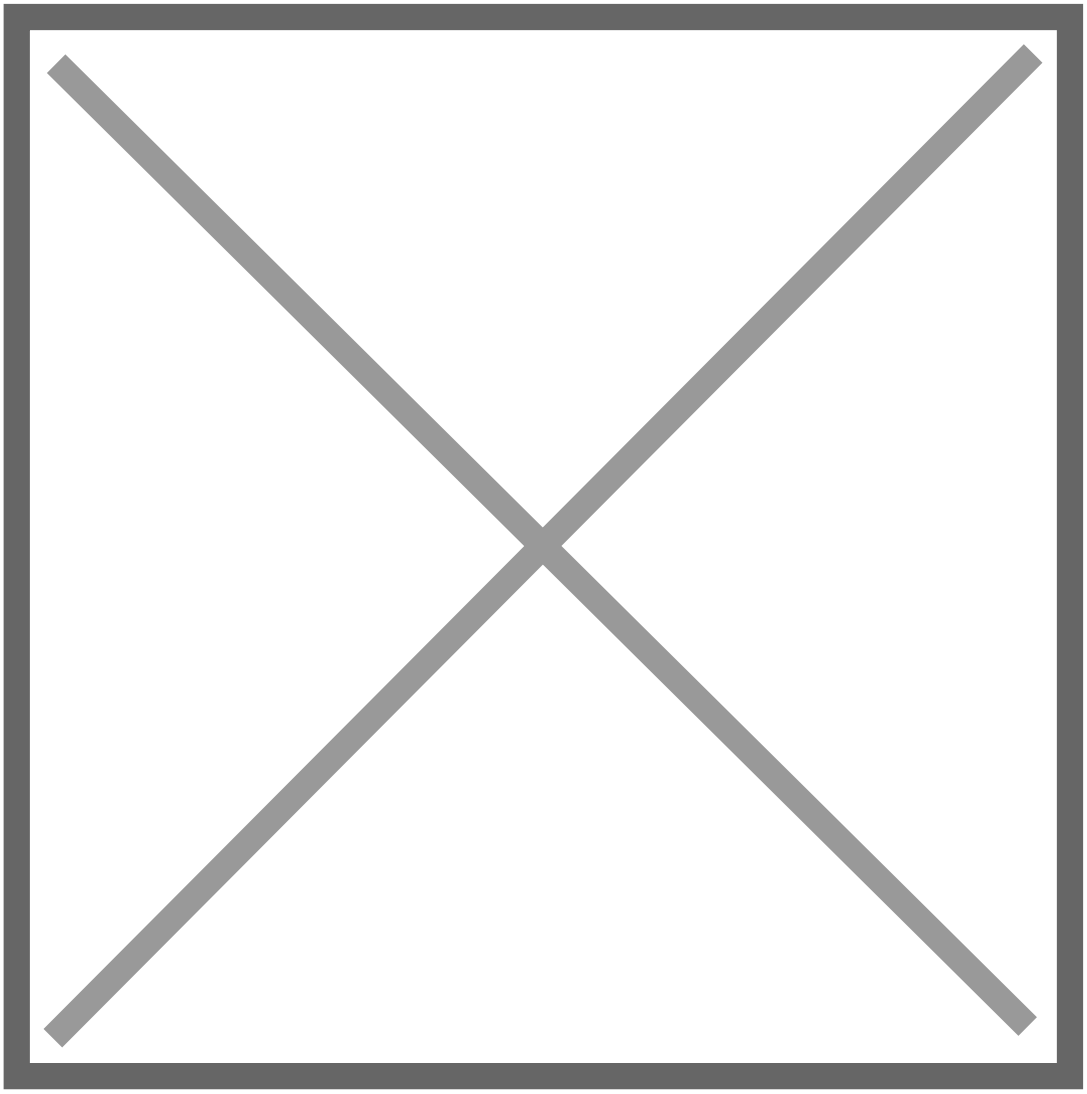


38. Click the email message field.

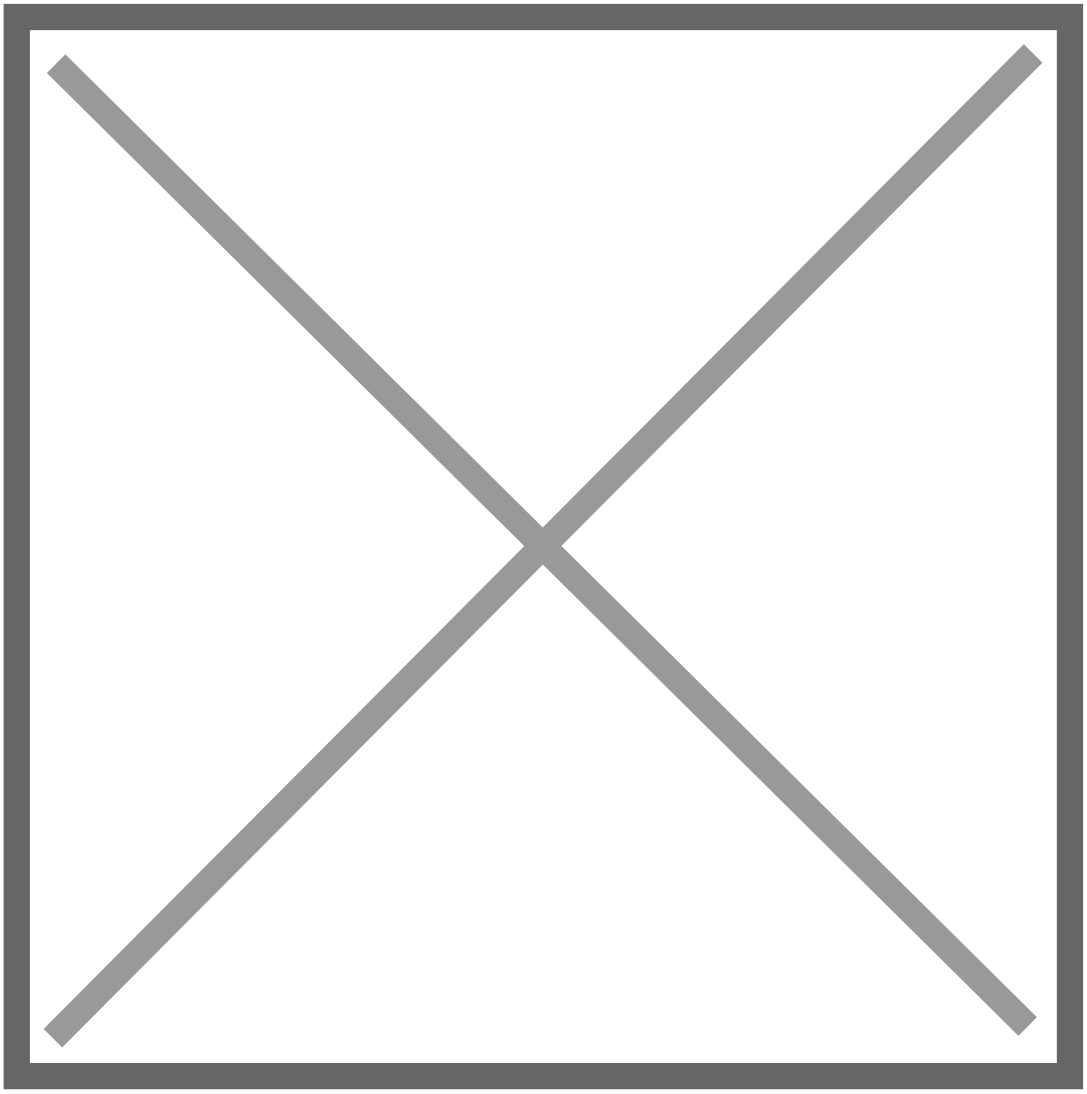
Create the message you would like the signer to receive.



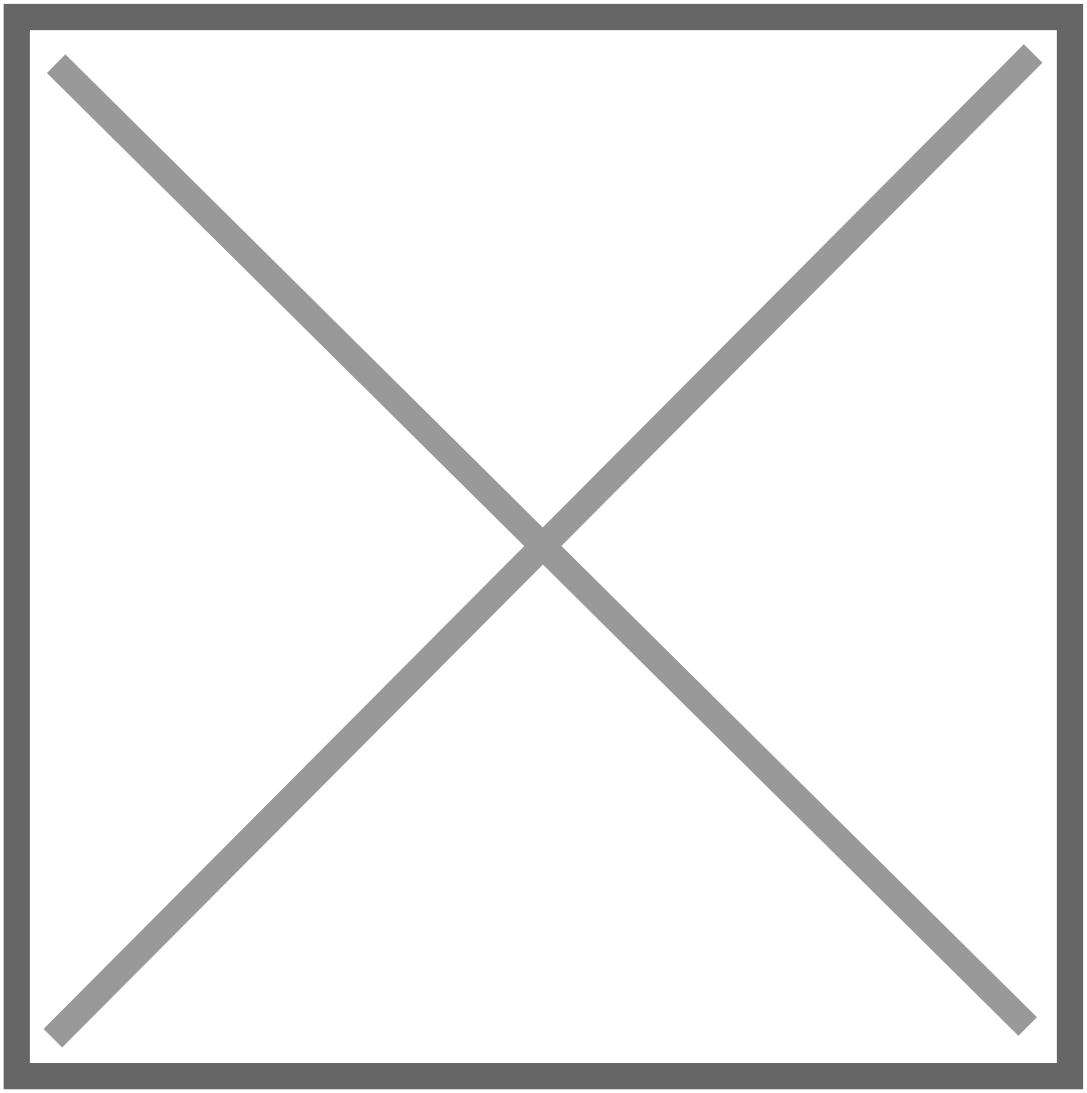
39. Return to the workflow canvas.



40. Select Notification.

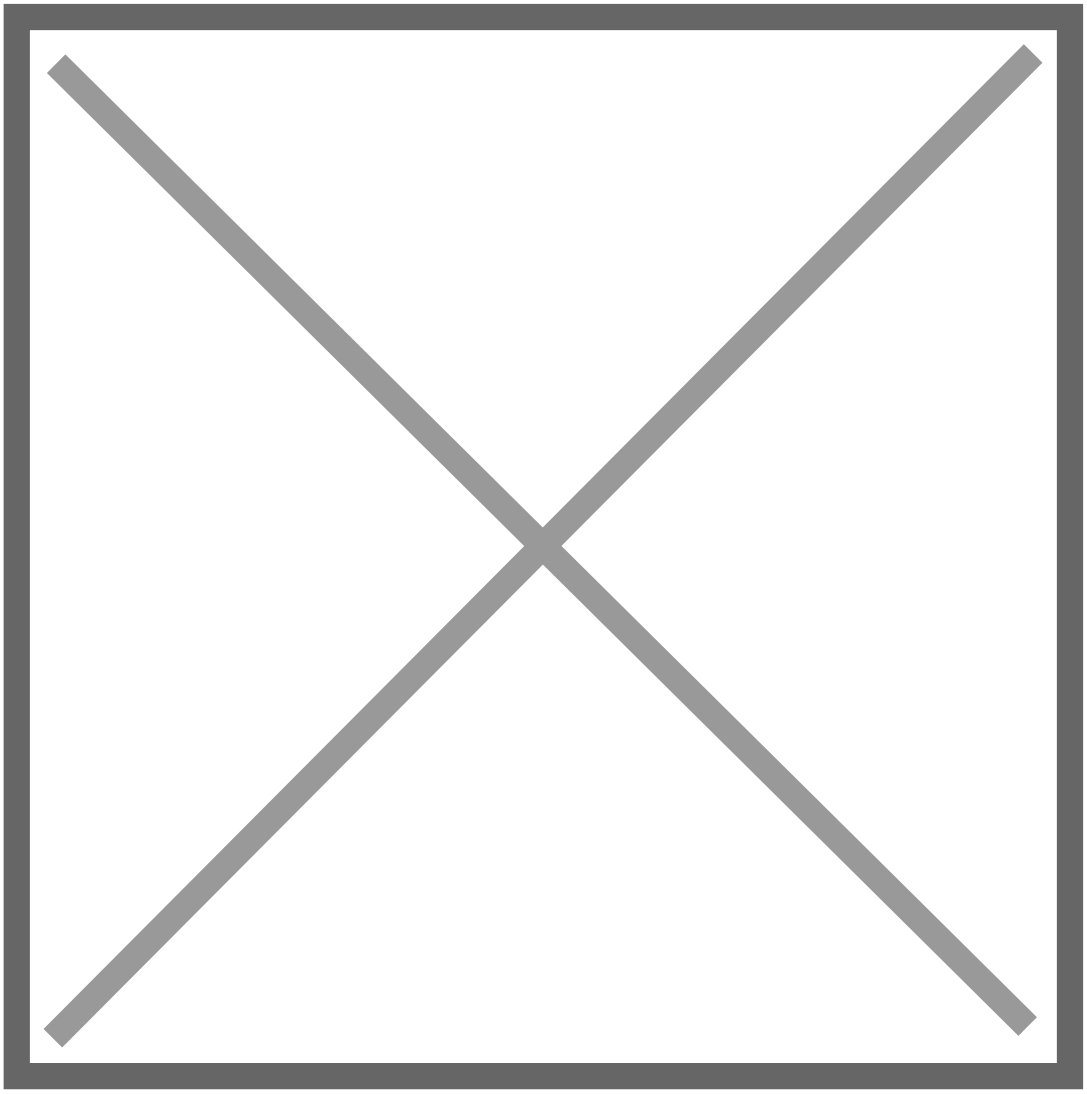


41. Click the notification recipient field.

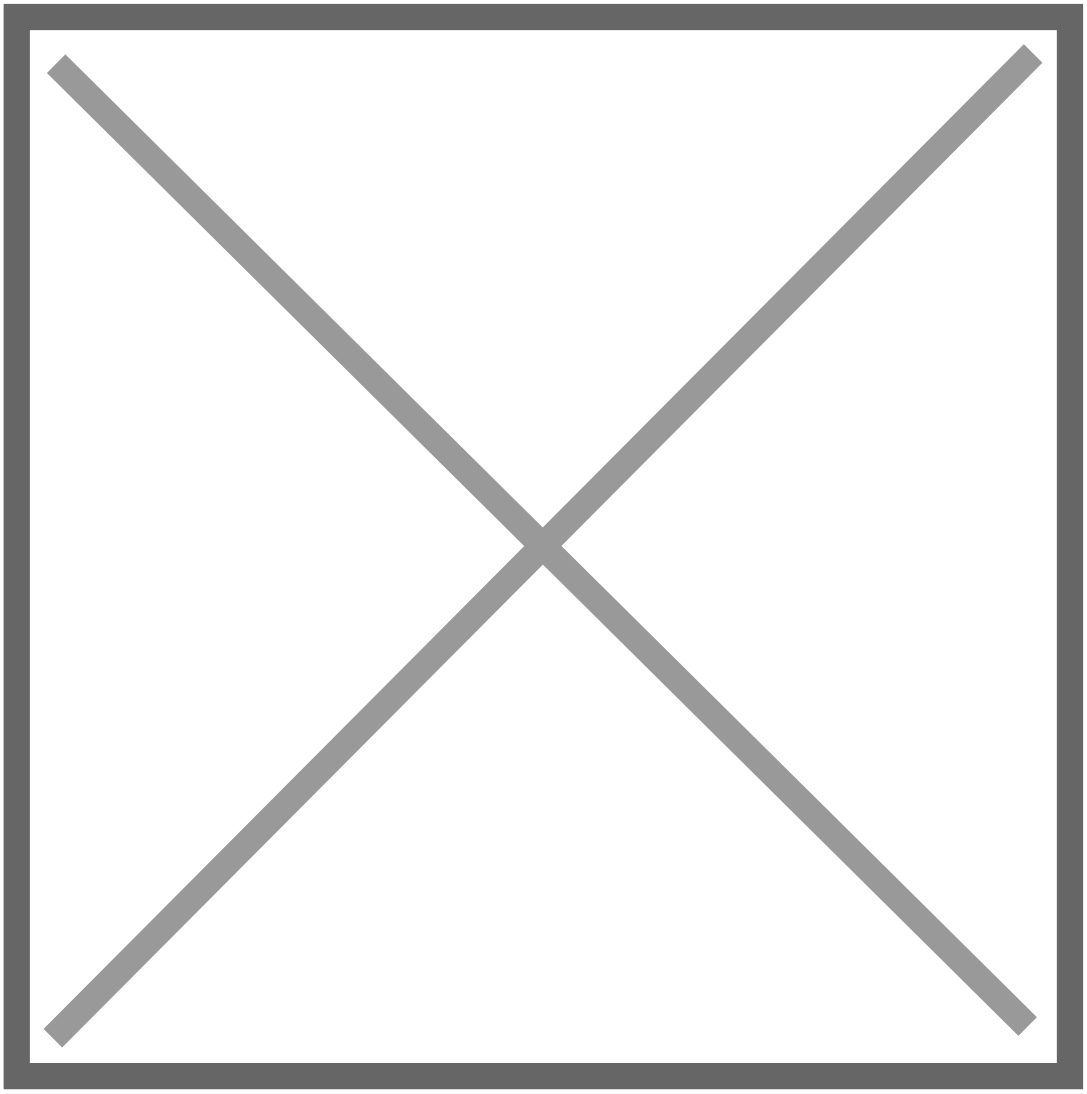


42. Type the email address of the person(s) who need to receive the final signed document.

If one of the fields on the document is an email address, you can select it from the "data" tab and drag it over to the "Send to" box. Be sure to separate all with commas.

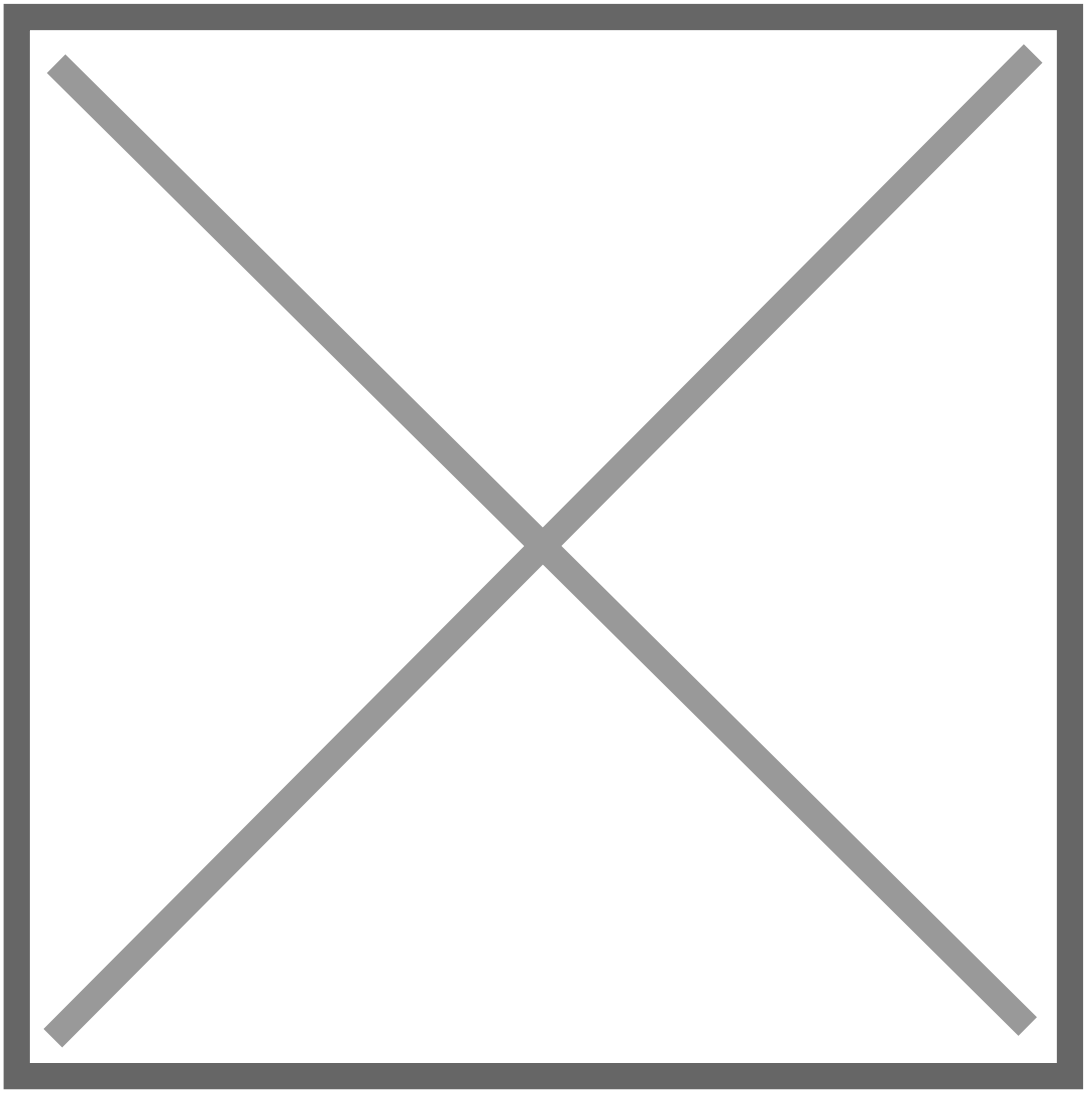


43. Create the email notification message.

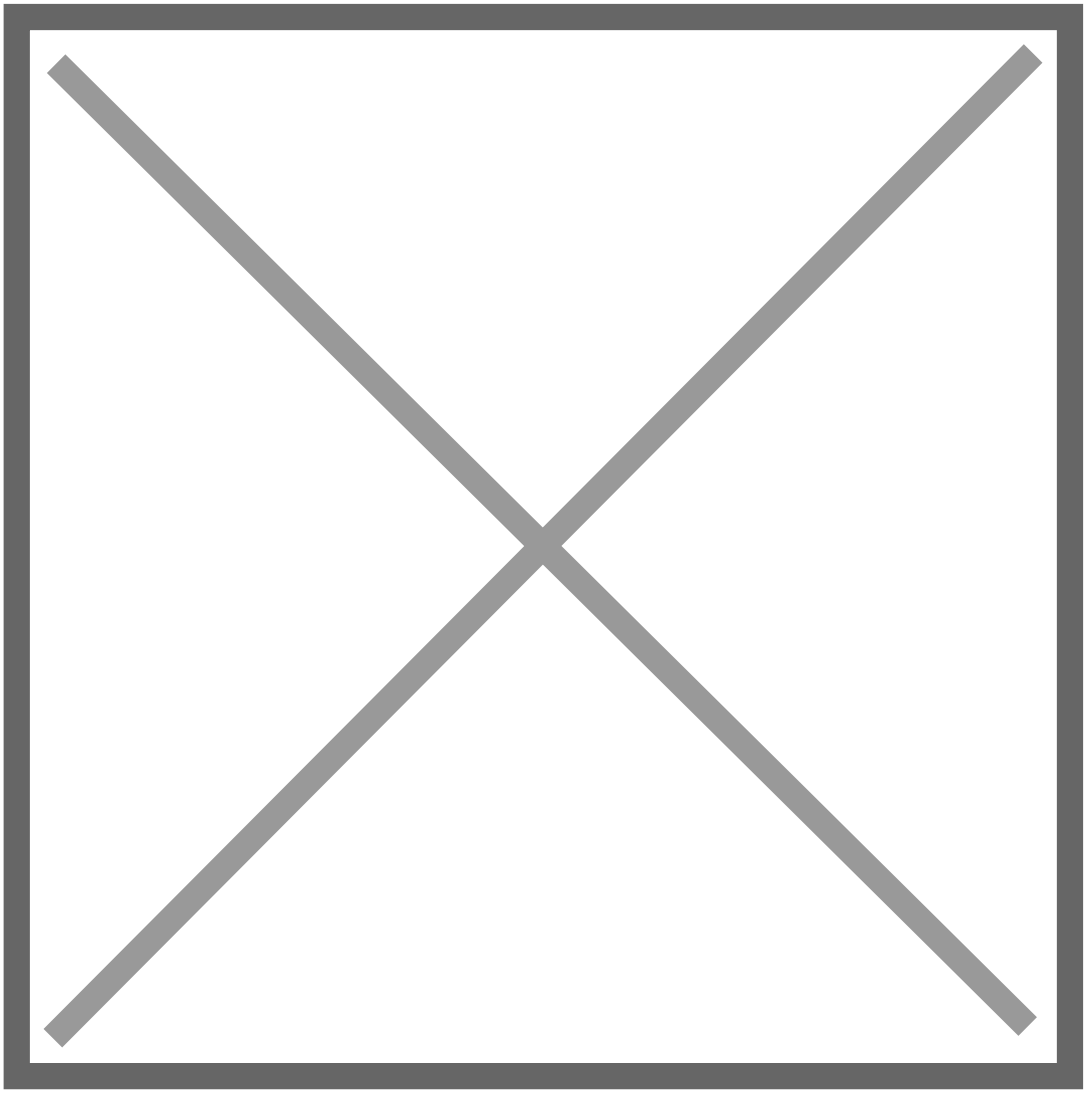


44. Open the workflow file selector at the bottom and select the signed document.

If there are other files or attachments, you can add those as well.

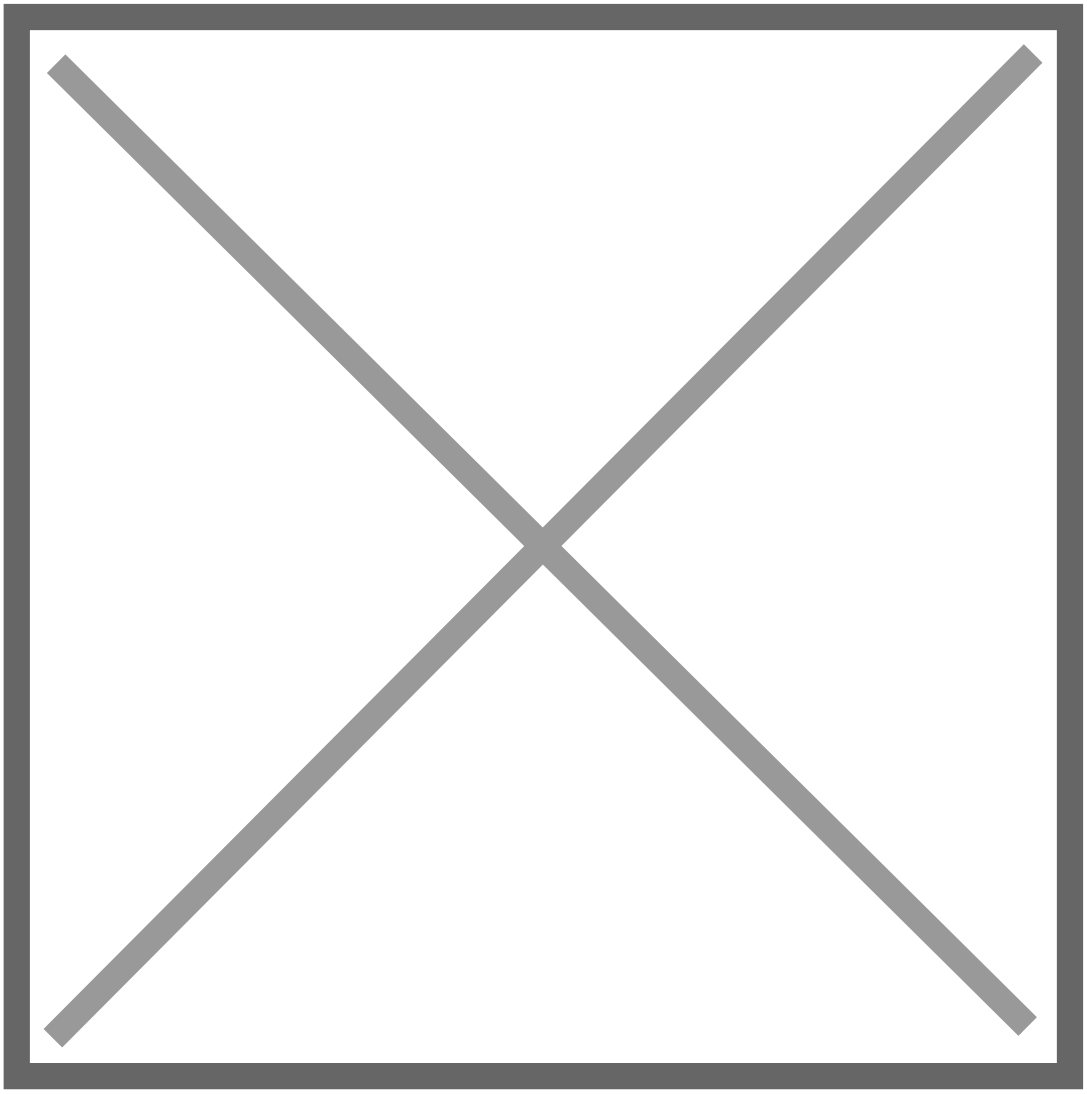


45. Close the notification editor.

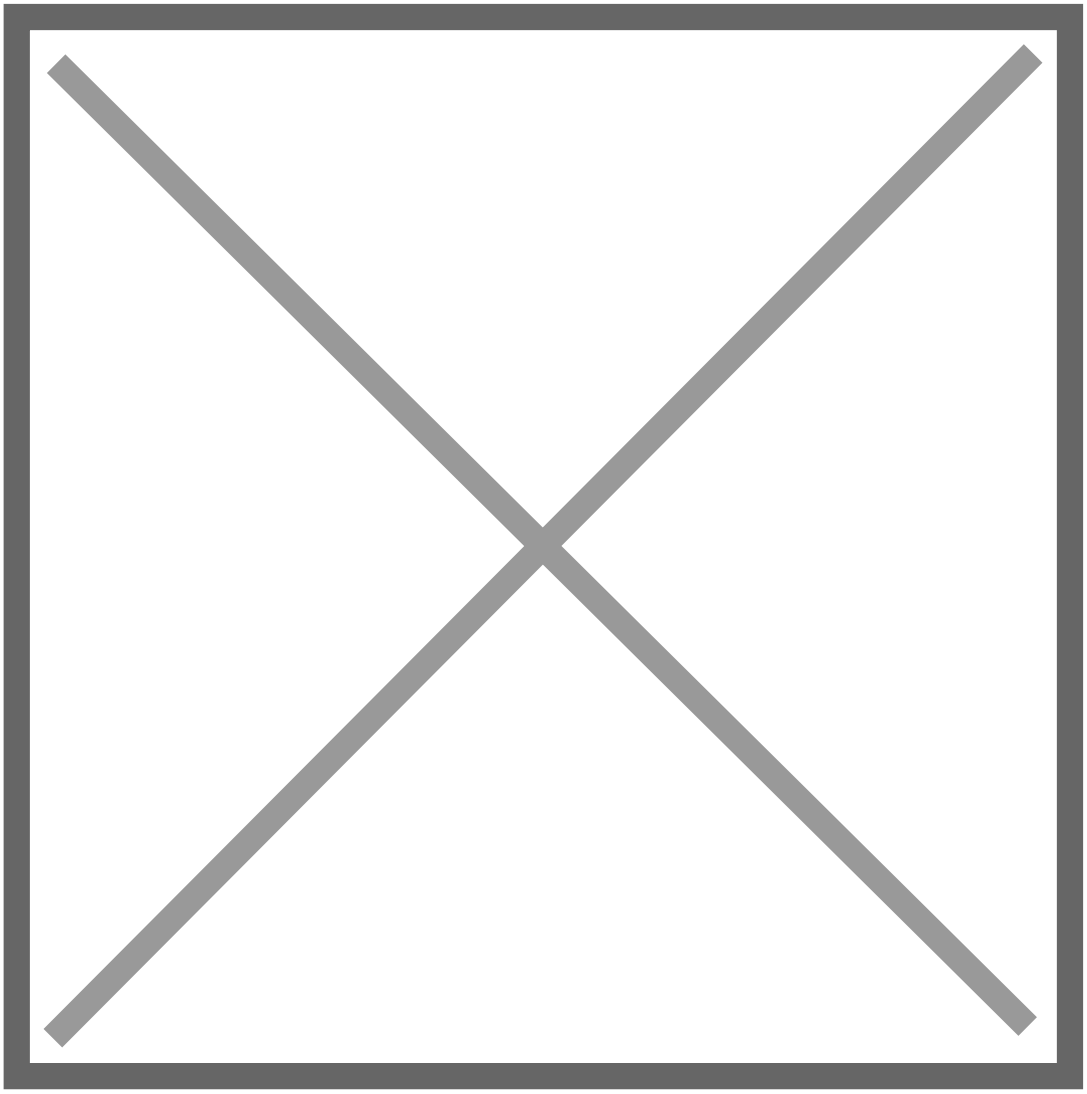


Publish and Share

46. Open the Publish menu.

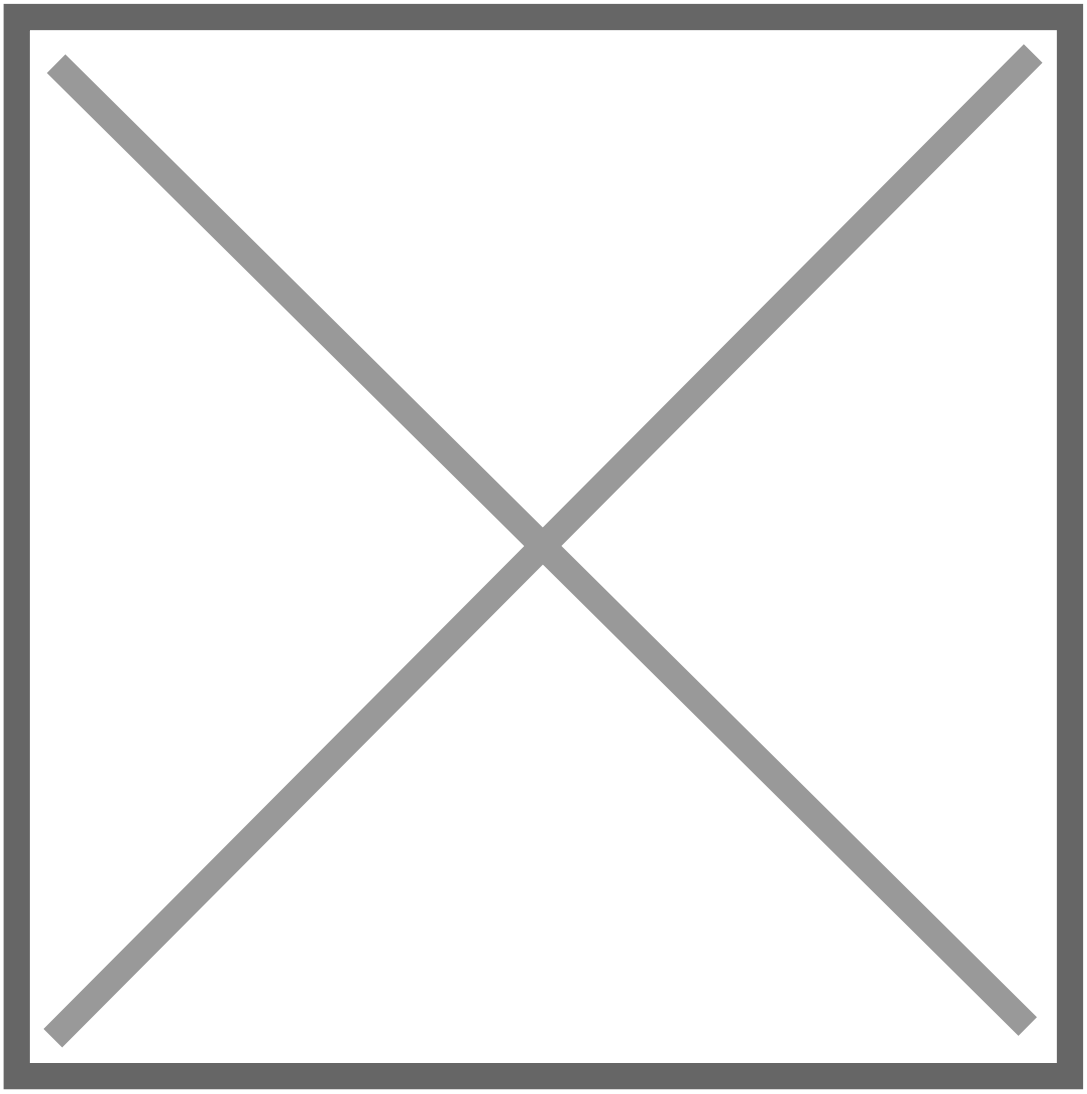


47. Open Session name.

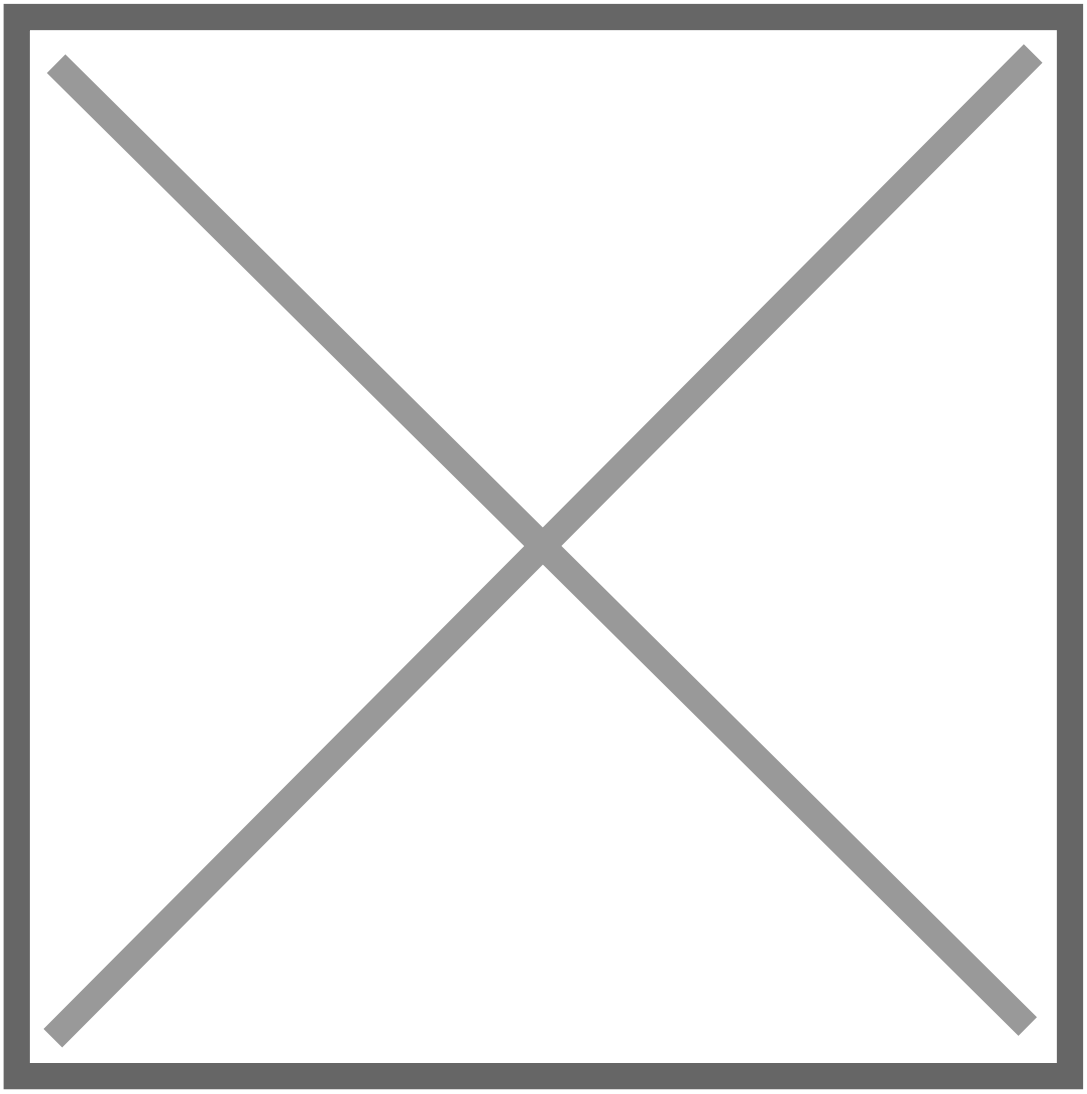


48. Select Signer 1 - Name for the session name.

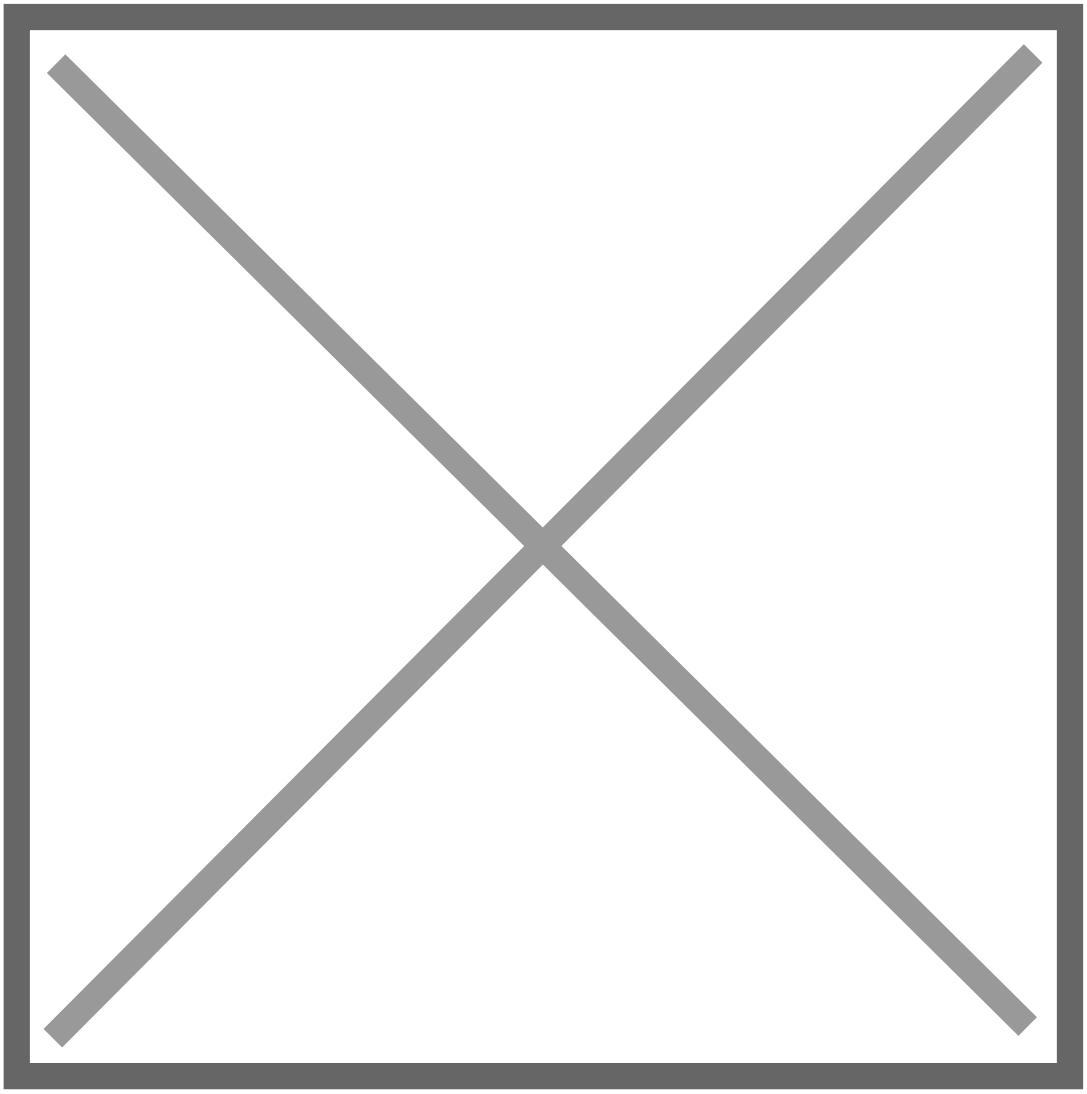
Heed the data warning. Don't use sensitive information from the session. Names and Student ID are fine.



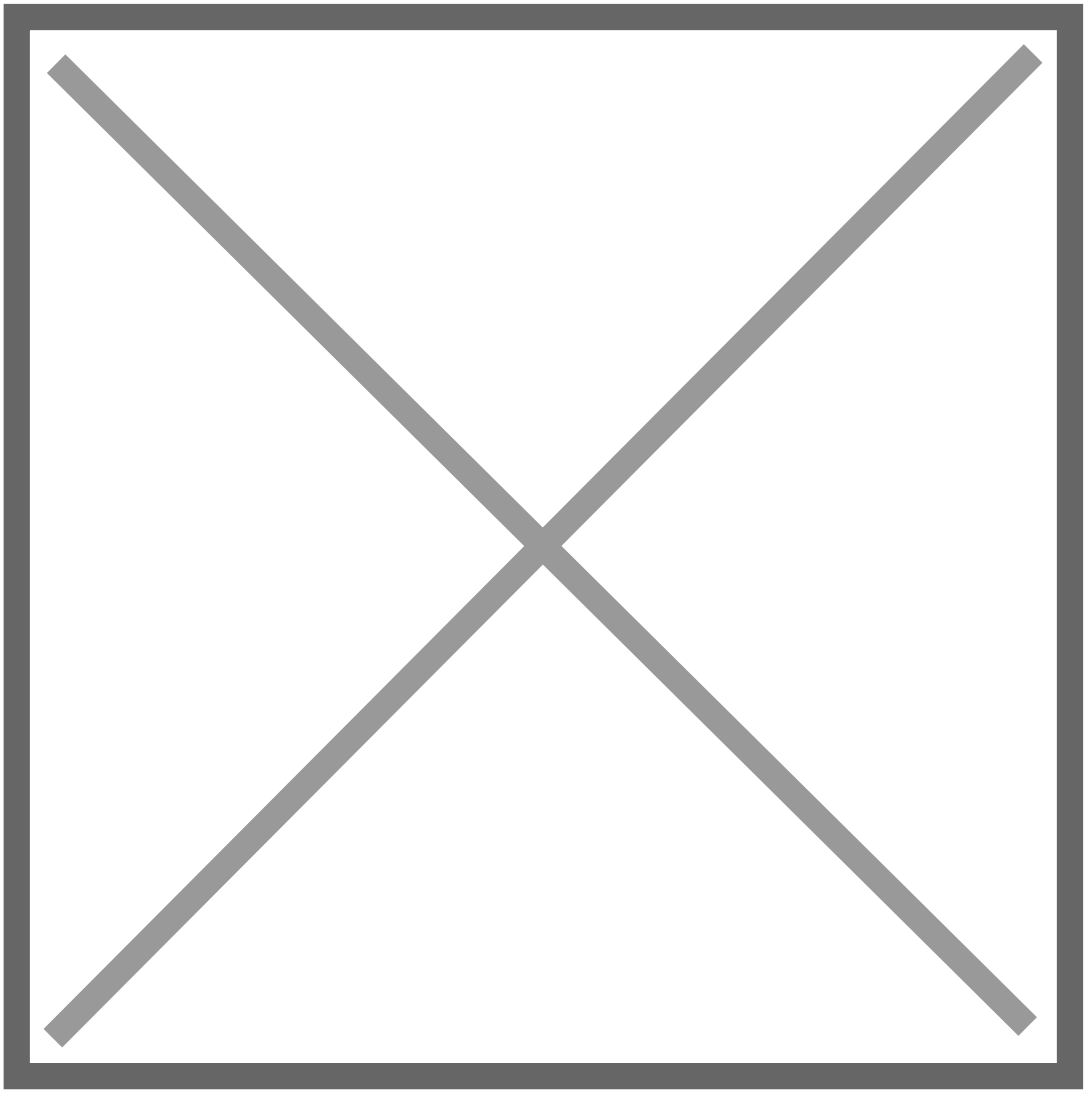
49. Click Publish workflow.



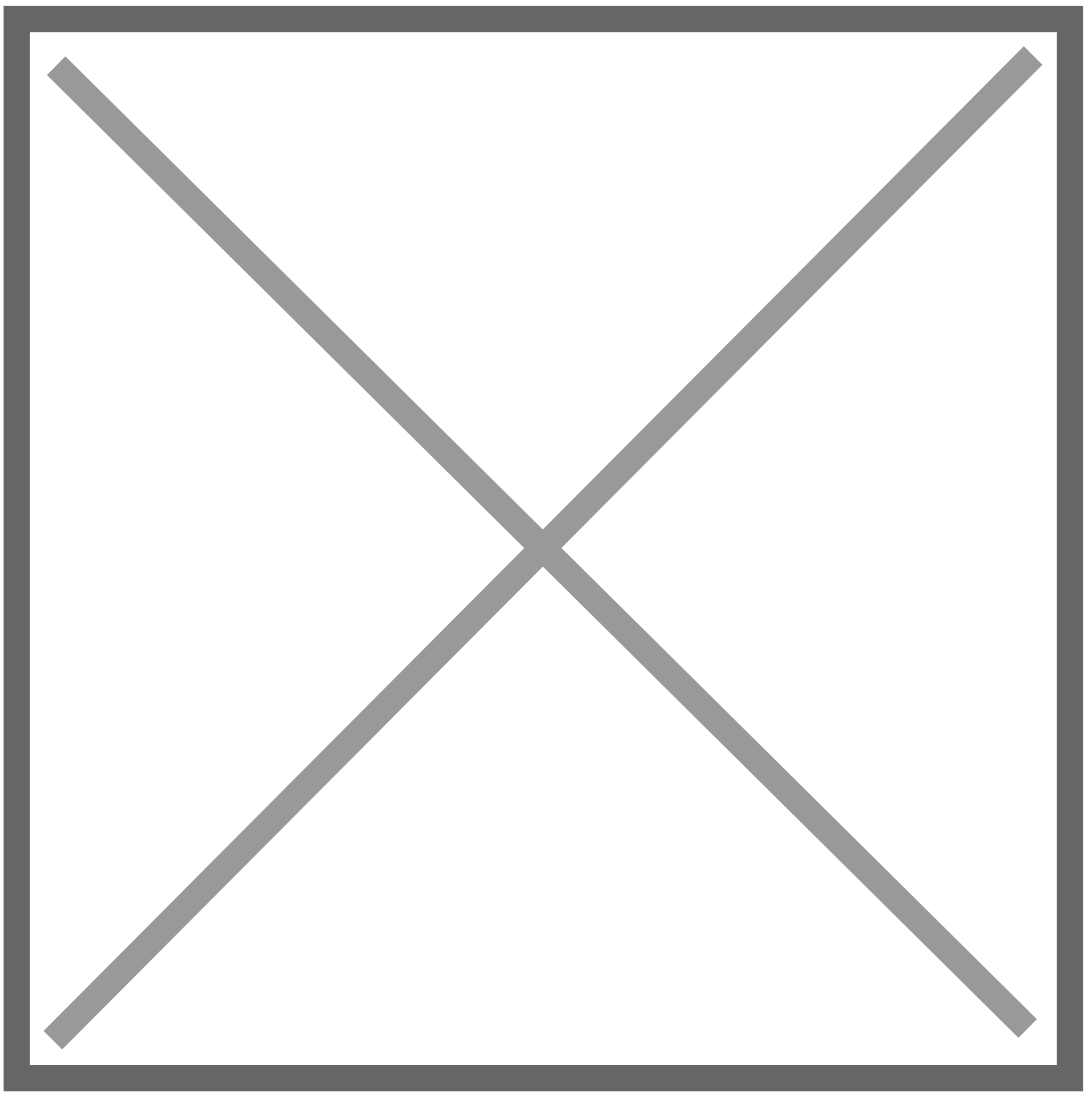
50. Return to the project sessions page.



51. Click Share.



52. Select Open directly.
You may also like using the QR code.

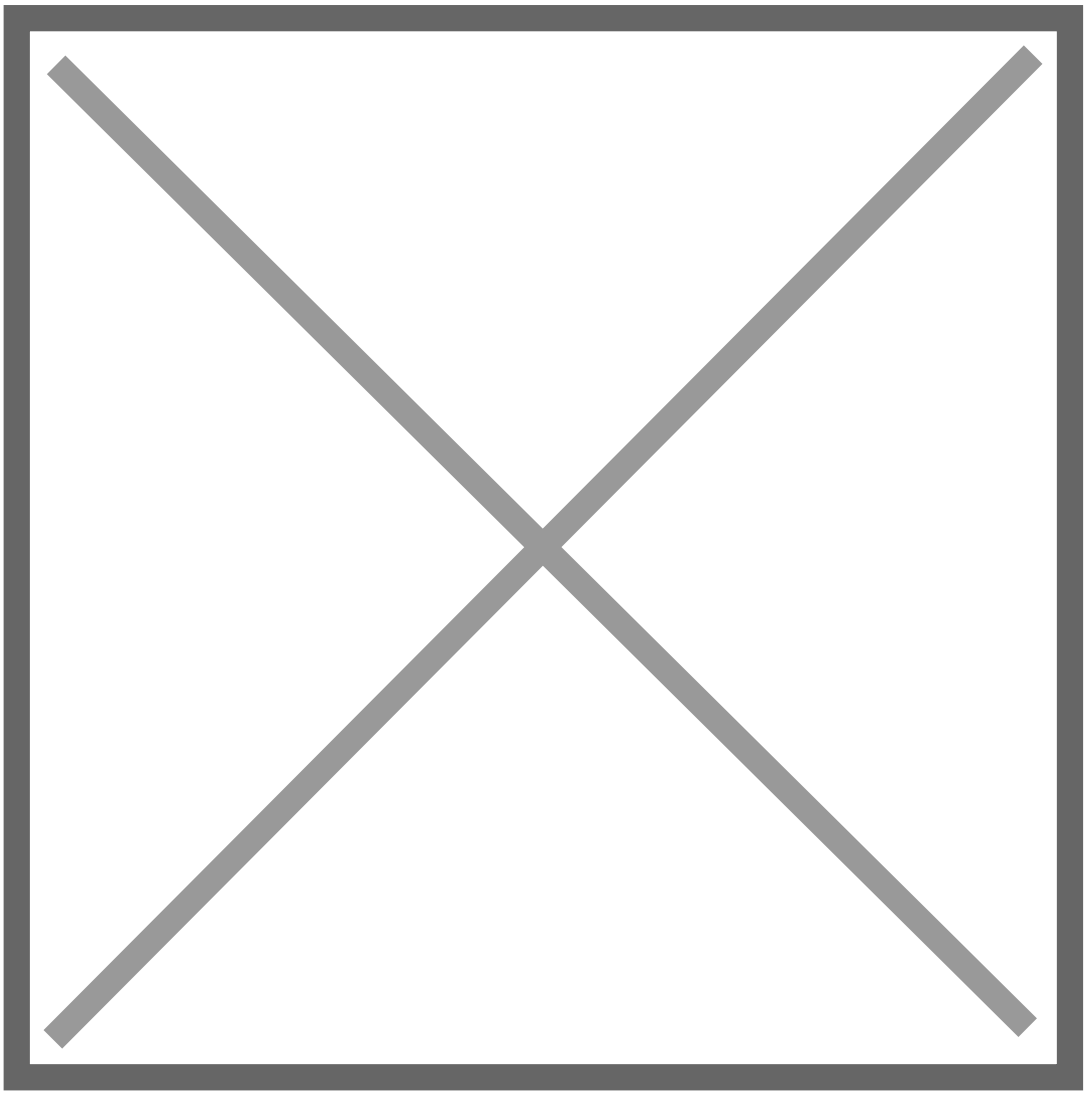


Viewing Completed Workflow Documents

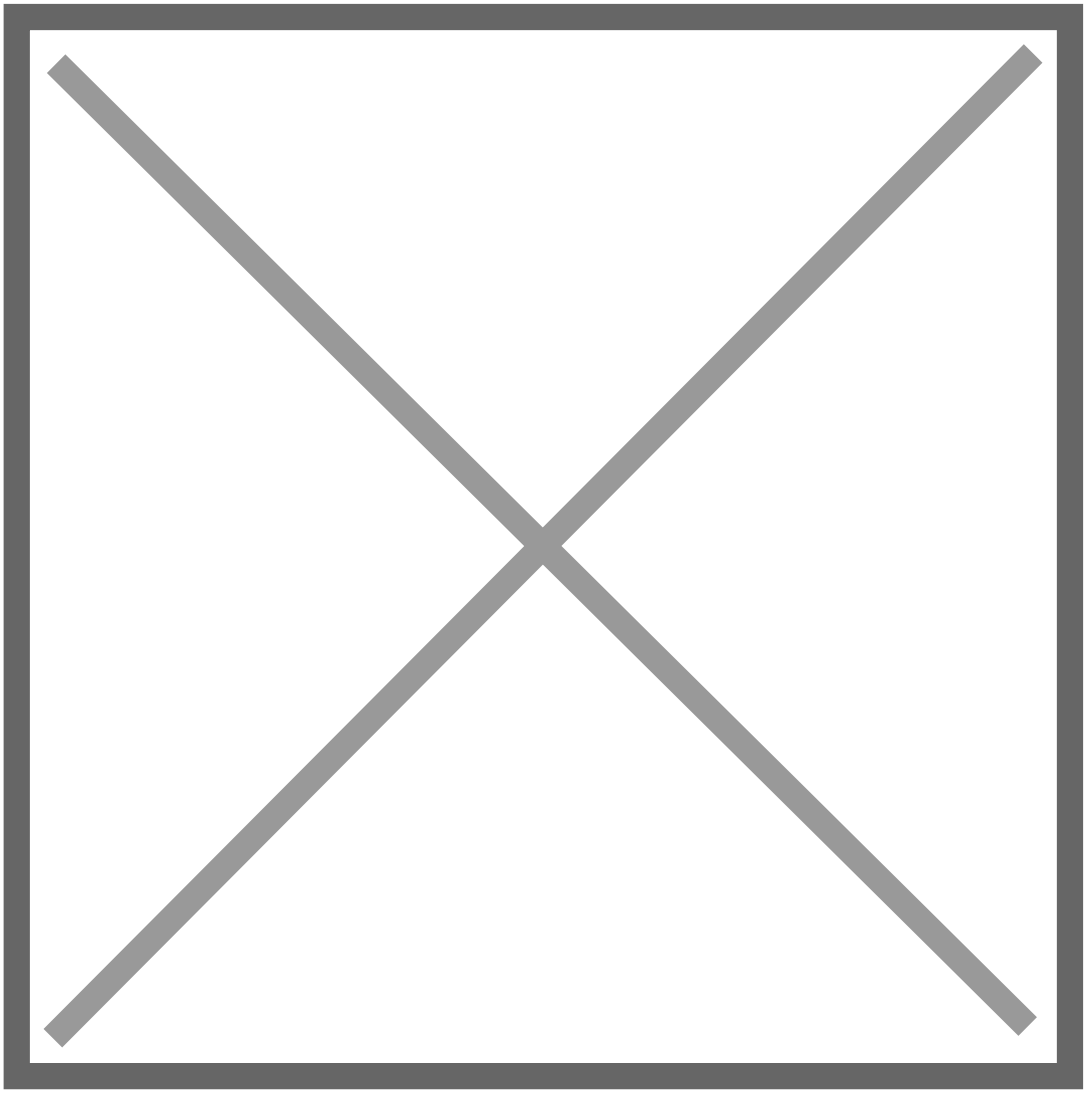
Learn how to navigate the Streamline platform to find specific sessions and download completed documentation.

Updates to this process are expected.

1. Navigate to https://us.streamline.intellistack.ai/landing-page

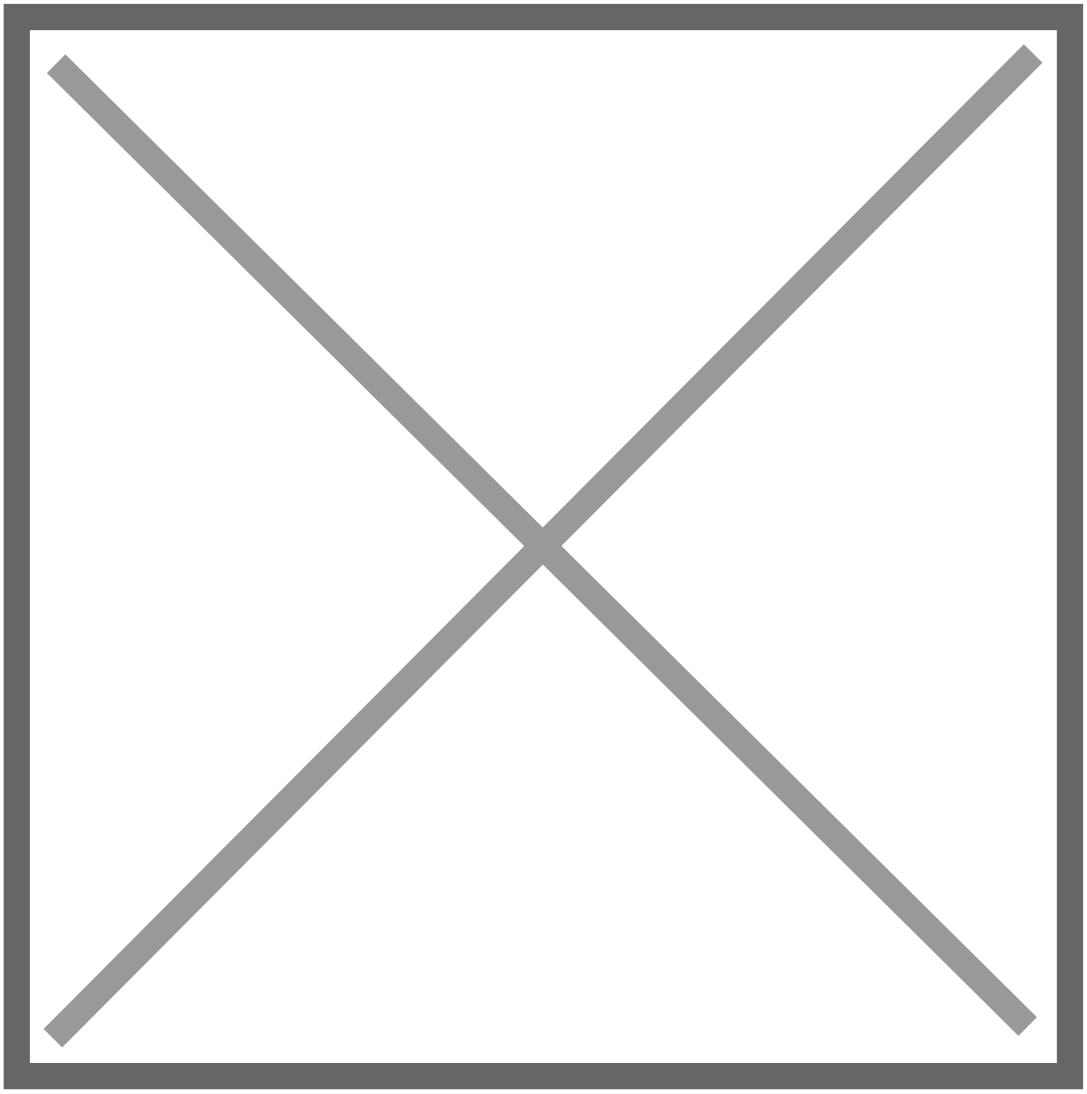


2. Click "Repository"

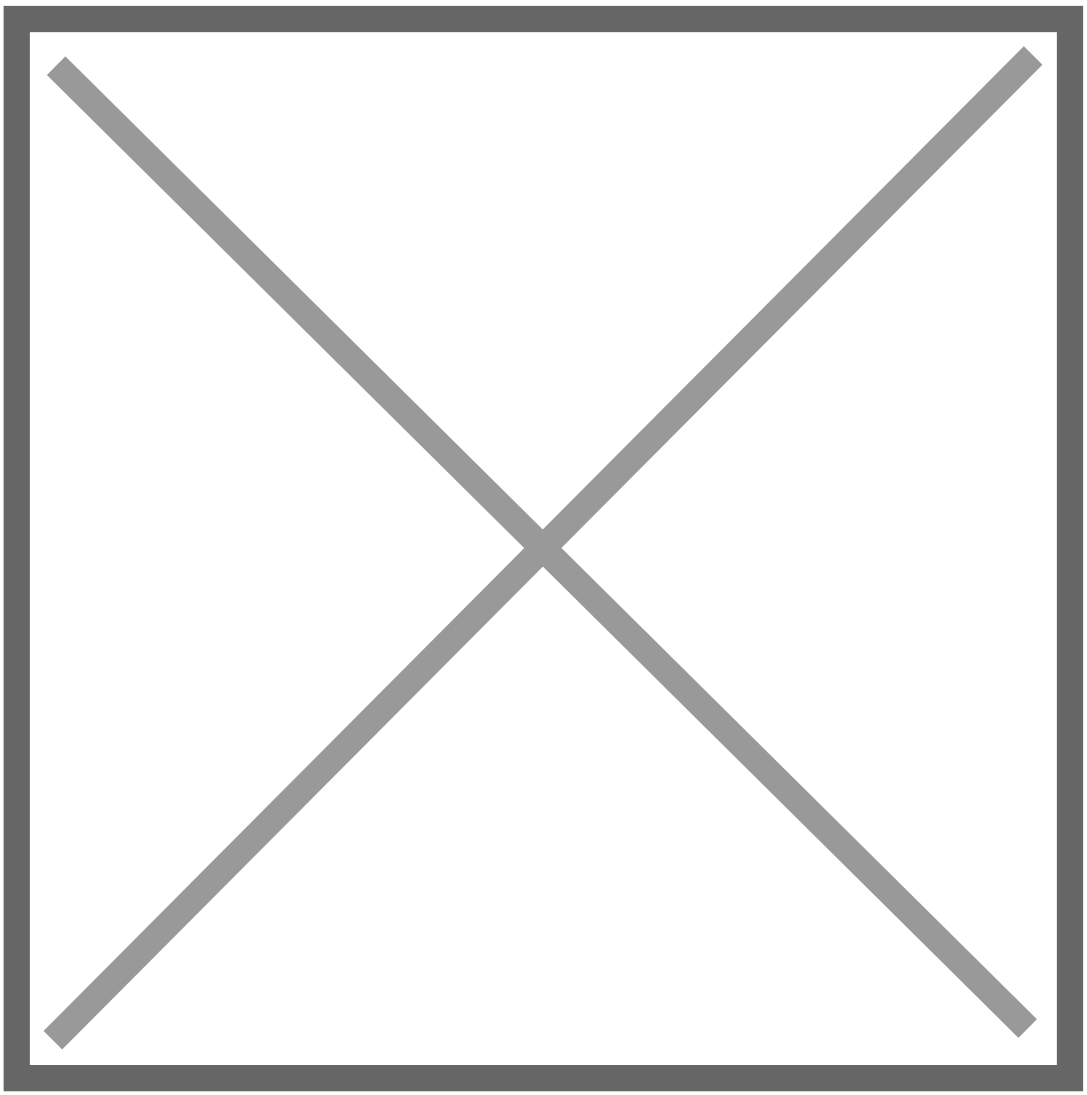


3. Find the document you are looking for. You may have to scroll to the right. There is a search bar to help filter as well. It can be hard to find one specifically if there have been a lot of submissions, so you may have to open it and check.

As of 10/1, we sent this to product support to clean up the UI and make it a little easier.



4. When you find the correct document, you can view the details, the timeline, and the completed document. Click the "Download Document" button.



COI Workflow

Instructions for how the ASU System Conflict of Interest workflow functions. Guides are or will be available for editing the workflow, contact information, and appropriate links to COI training materials.

The Workflow

COI Training Links

Campus COI Contacts