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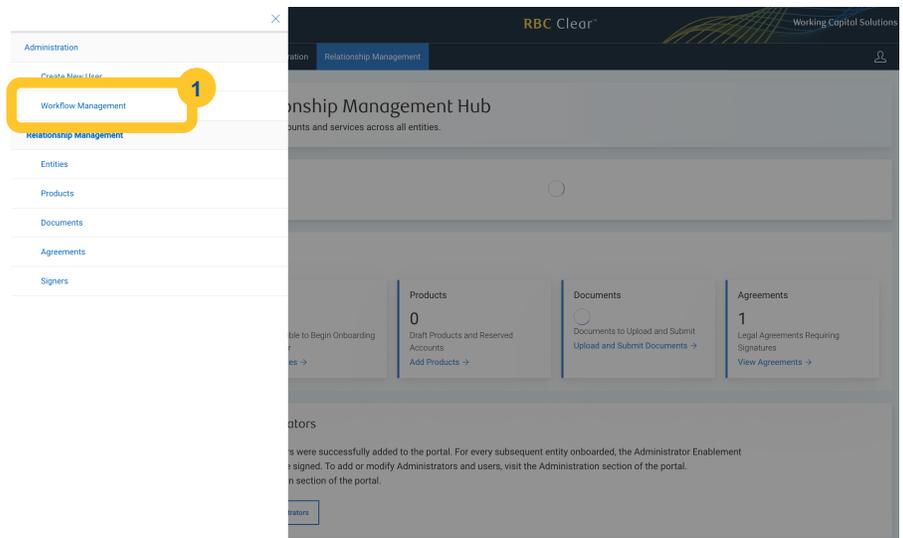
# Navigating Workflow Management

Workflow Management centralizes all your workflow administration in one location. This guide will walk you through navigating it.

## Workflow Management

Workflow management allows administrators to view and manage approval workflows and is only accessible to administrators.

1. Click the menu on the left to expand the side panel, then click Workflow Management.



2. On the workflow management page, view all available workflows based on your entitlements.

a. Click **Details** to view the workflow details, parameters and audit information.

b. Edit the workflow by clicking the pencil icon or the **Edit Workflow** button to start.

The screenshot shows the 'Workflow Management' page in the RBC Clear system. It features a table with the following data:

Name	Type	Description	Status	Actions
Host-to-Host	Default	The number of approvers required each time a payment file is transmitted via Host-to-Host for processing.	Active	<a href="#">Details</a>
File Upload	Default	The number of approvers required each time a payment file is uploaded via RBC Clear portal for processing.	Active	<a href="#">Details</a>
Machine-Readable Statements	Default	The number of approvers required each time a new Machine-Readable Statement subscription is generated.	Active	<a href="#">Details</a>
Money Movement (Online Banking)	Default	The number of approvers required to send a payment manually via RBC Clear portal for processing.	Active	<a href="#">Details</a>

At the bottom of the table, there is a pagination control: 'Rows per page' set to 10, '1-4 of 4', and 'Page 1 of 1'.

The screenshot shows the 'Workflow Management' page with the 'Money Movement (Online Banking)' workflow details panel open on the right. The panel contains the following information:

- Workflow details:** Description: The number of approvers required to send a payment manually via RBC Clear portal for processing.
- Workflow Parameters:**
  - Required Approvers: 1
  - Minimum Transaction Limit: 0.01 USD
  - Maximum Transaction Limit: 999999999.99 USD

At the bottom of the panel, there is an 'Edit Workflow' button highlighted with a yellow box and a '2b' callout.

3. To modify the workflow criteria, you can specify the number of approvers required for specific transaction limits or establish additional amount thresholds.

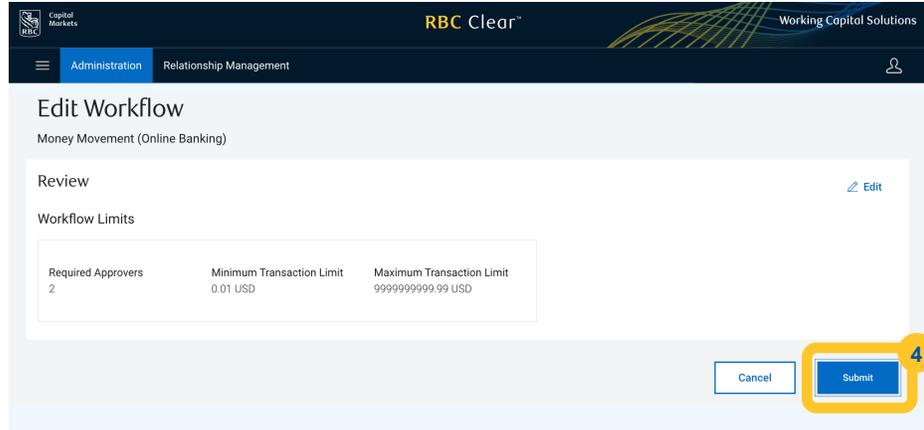
When you have completed your changes, please click **Review** to verify your settings.

The screenshot shows the 'Edit Workflow' page for 'Money Movement (Online Banking)'. The 'Workflow Limits' section is highlighted with a yellow box and a '3' callout. It contains the following fields:

- Required Approvers:** 1
- Minimum Transaction Limit:** USD 0.01
- Maximum Transaction Limit:** USD 9,999,999,999.99

Below these fields is an 'Add Amount Threshold' link. At the bottom right, there are 'Cancel' and 'Review' buttons.

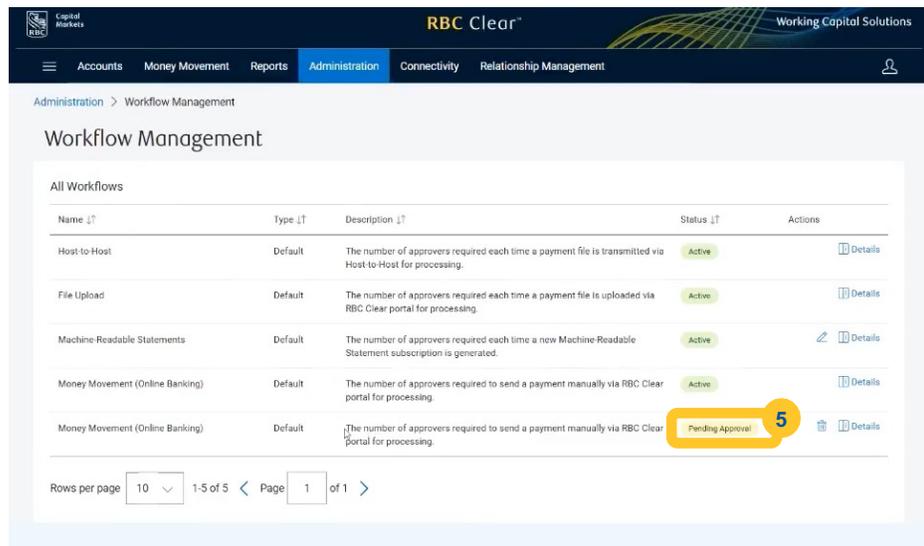
4. After reviewing and confirming that all information is correct, click **Submit**.



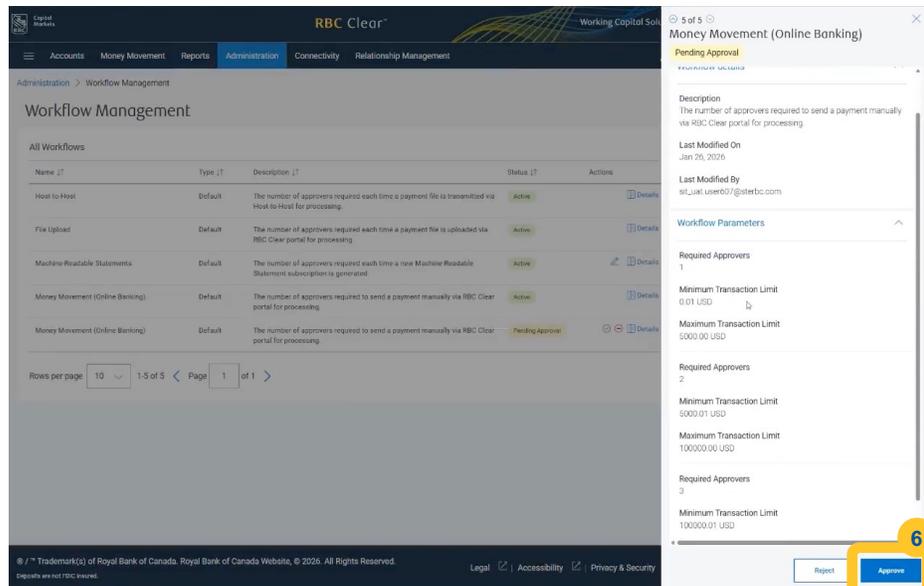
5. All modifications or new workflow criteria require approval before implementation.

Another administrator must review and either approve or reject each pending submission.

As an approver, go to the Workflow Management Hub and find request(s) with 'Pending Approval' status.



6. Click **Details** to review the transaction information, then choose either **Approve** or **Reject**.



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