Admin Tools ▾   System Administrator (admin) ▾   🔍 People

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Admin Tools

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Route Document

| Search for Forms | Select Forms | Select An Action | Summary |

First, search for the forms.

Search By:
| Form ID |
| Form Template |
| Employee's Folder |
| Subject User |

[Search]

Manage the Process   **Route Forms**

This section provides an overview of how to route a form to a different stage in the review process.

Routing Form Main Concepts

On occasion, you might have to manually move a form or forms through the review process. Generally, you will be making changes on behalf of other employees to keep the form moving forward. You can also send the form back a step in the case of a mistake in sending to the next step.

A *stage* is the current state of the form. Each stage may have multiple steps. The stages and steps are defined in the form's routing map. The form can be routed when it is in any stage.

The route form options are the same for each stage:
• Move the form one step forward (N/A if form is complete)
• Move the form one step back (N/A if form is in first step)
• Move the form to a specific step
• Move the form to a new step

When routing a form, you may choose the reason for the change (required) and enter comments about the reason (optional). The reasons can be "Skip step to continue the process" or "Move form on behalf of [current owner]".

Note: Make sure users are notified if forms are routed to them. When you manually route a form, SuccessFactors sends email notifications as defined in your email notification settings. Alternatively, you can send a system email to notify users.

Routing Form Main Concepts

Routing a Form One Step Forward

To route a form one step forward is to move it to the next recipient in the workflow – either to a step within the current stage or to the first step in the next stage.

This may be done to skip steps that may not be relevant to a certain employee or group of employees. Another common reason this is done is to approve a form on behalf of the current owner, in the event that the current owner is unable to move the form on his own.

Routing a Form One Step Back

To route a form one step back is to move it to the previous recipient in the workflow – either to a step within the current stage or to the last step in the previous stage.

This may be done to return the form to the previous user in cases where the form was prematurely sent to the next step. Another common reason this is done is to correct errors in the modify stage after the form has been sent to signature.

Routing Form Main Concepts

Form Title: Annual Review for Marcus Hoff *(Doc ID: 7861)*

☐ Current step of selected forms ⓘ Iterative Step ⓒ Collaboration Step 👤 Step Owner

Current State	End State
Modify Stage	
1. Employee As... 👤 Marcus Hoff Due Date: None **1 forms**	
▼	Select an action first
2. Team Evalua... Carla Grant Due Date: None	
▼	
3. 1:1 Meeting Carla Grant Due Date: None	
Signature Stage	

How do you want to route the form?

○ Move the form one step forward
○ Move the form one step back
○ Move the form to a specific step
○ Move the form to a new step

Routing a Form to a Specific Step

To route a form to a specific step is to move it to any workflow step within the current route map.

This may be done for a number of reasons:

- To skip a step or steps not relevant to a certain employee.
- To move a form from a signature step back to a previous modify stage.
- To move a completed form back to a signature stage or modify stage.

Routing a Form to a New Step

To route a form to a new step is to create a new step not currently in the route map and move to this new step.

This may be done to create an additional signature step, if requested, or to add another level of review.