Slack Workflows

Be sure to join us in QualityNet Slack at:

#qnet-slack-workflows-training-september19

We will be practicing together in the channel during the training.

Agenda

- What are Workflows?
- Building Workflows
  - Triggers
  - Adding Steps
  - Buttons & Variables
  - Custom Icon
  - Collaborators
  - Setting, Workflow, & Activity Tabs
- Tracking
- Demos of Building Workflow with Different Triggers
- Miscellaneous info and workflow examples
- Glossary
- Q & A

What are Workflows?

What are Workflows?

A no-code automation tool to run routine processes in the QualityNet Slack workspace

A type of message sent in Slack

A sequence of steps


All-New
Workflow Builder
Video

What are Workflows?

Workflows allow you to create consistent communications triggered by a certain event.

- Time of day
- Time of week
- Specific action triggers
  - Daily Reminders about meetings
  - Sprints
  - Onboarding information for new channel users on your team
  - Access to documents

Workflow Advantages

No coding required!

As simple or complex as you'd like

Can connect to other apps and services used to get work done

Use Cases

Onboarding	Reminders	Sending Documents	Polling
Suggestion Box	Distributing Meeting Notes	Status Report Reminders	Birthday Greetings
Checklists	Feedback	Travel Requests	Recurring Messages
	Incident Reports	Project Updates	

Building Workflows

Workflow Building Steps

1. Decide how your workflow will start – its **trigger.**
2. Create your workflow **steps**. (actions your workflow can take)
   - Create and deliver forms
   - Create and deliver messages
3. Customize steps with **buttons** and **variables**.
4. Choose your **channel** where the workflow will be available.
   - You will be prompted to customize, depending on the trigger.
   - Workflows are channel-specific and can only be used in the channel you choose.
   - Cannot construct one workflow to run in multiple channels.
5. Add a custom workflow **icon**.
6. Add **Workflow Managers**.
7. Pick a **name** for your workflow. (e.g., "Welcome to the team!"; "Meeting time"; "Agenda")
8. **Publish**.
9. Test your workflow and make any necessary edits.

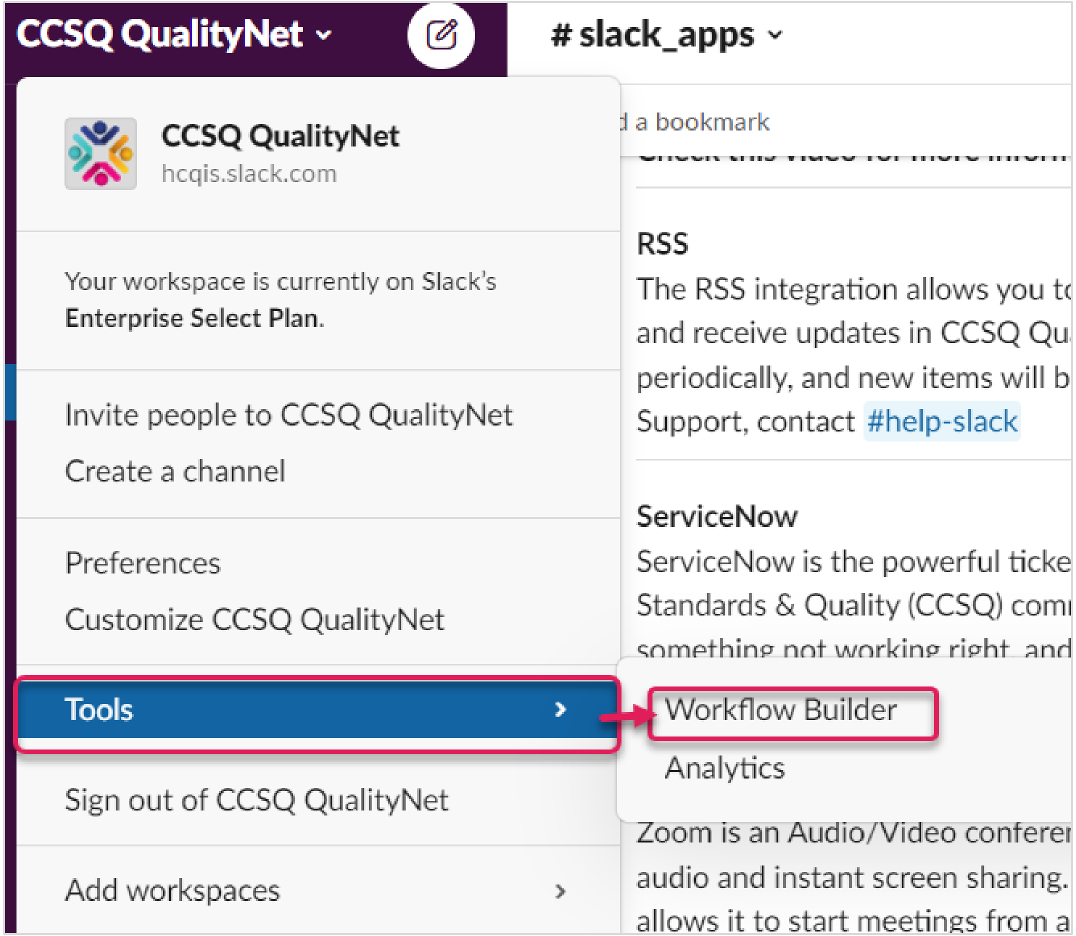
Beginning a Workflow

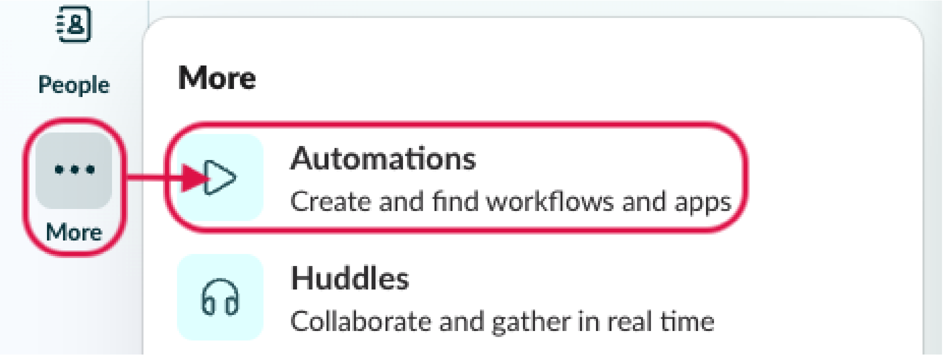
Two ways to open Workflow Builder:

1. From your desktop, click the **CCSQ workspace name** in the top left.
2. Select **Tools** > **Workflow Builder**

-or-

1. Click **More** on the left of Slack > **Automations**



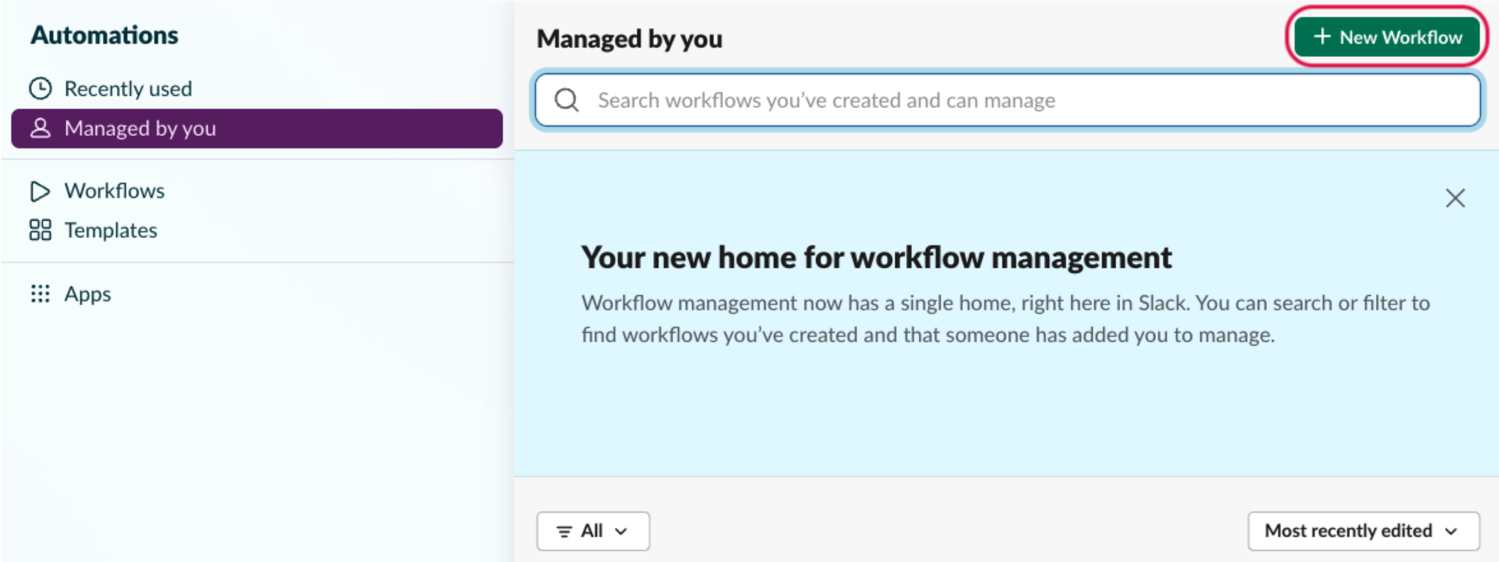


Selecting a Workflow Trigger

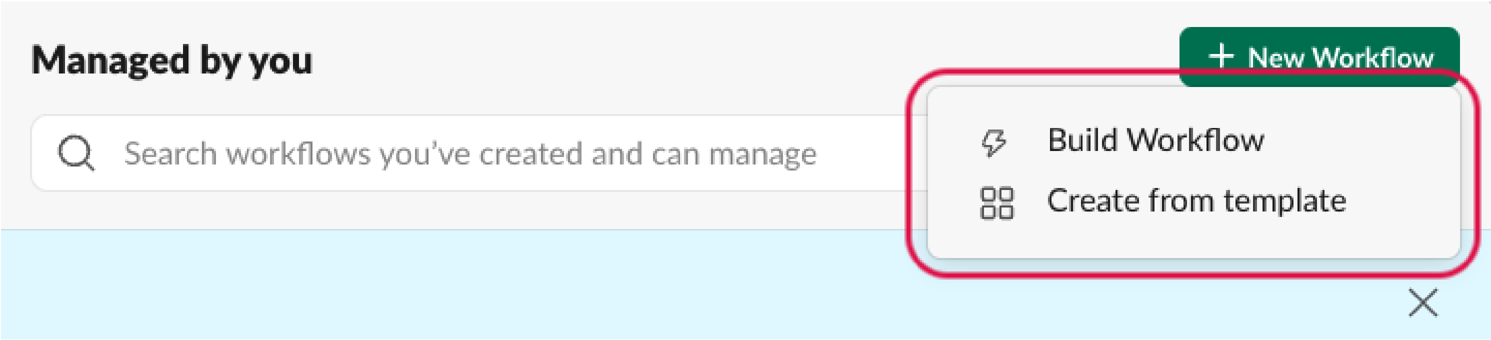
Choose your trigger:

1. From Automations, click **New Workflow** in the top right.
2. Select **Build Workflow** to start a blank workflow or **Create from Template** to select from a list of available templates

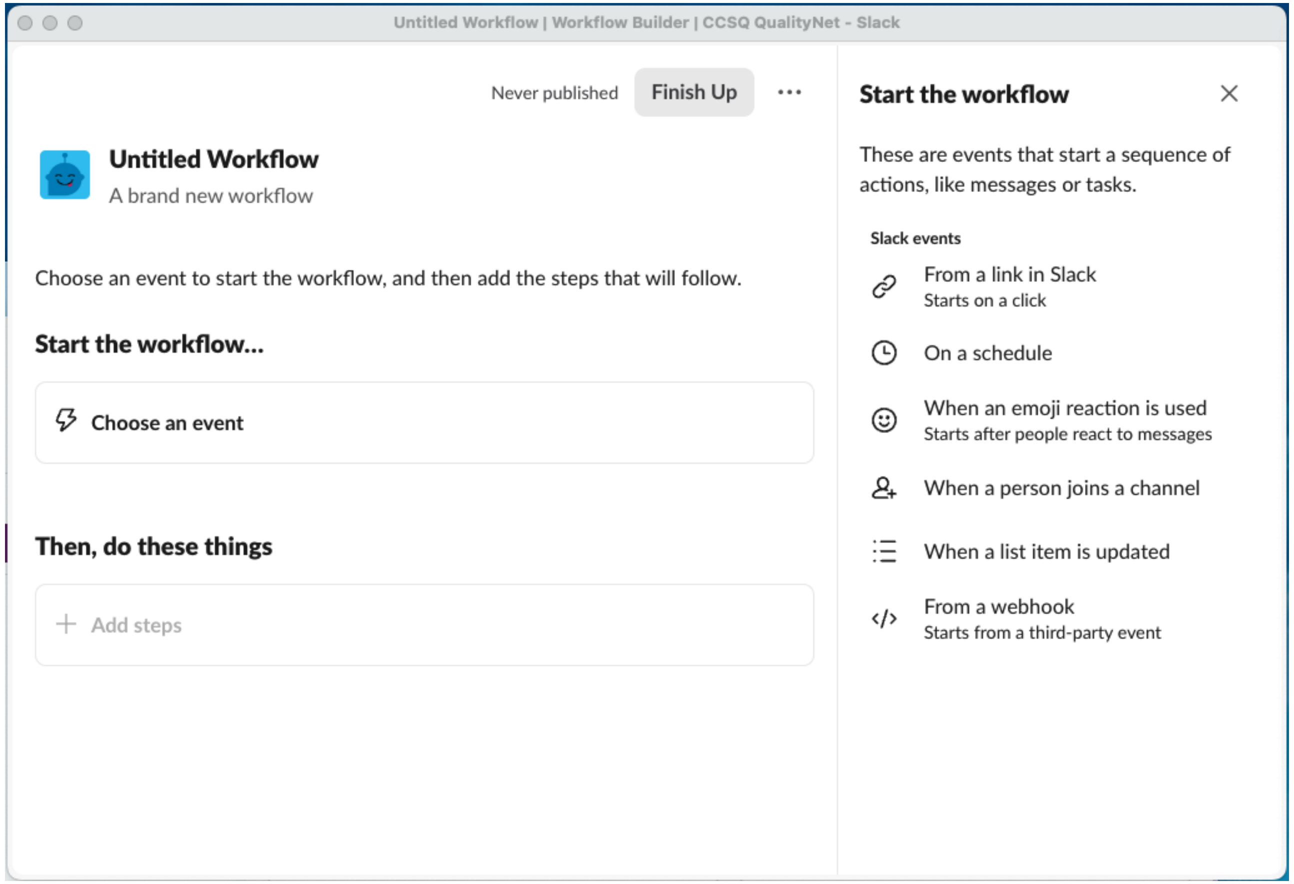
1



2



Triggers



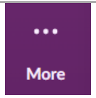
Triggers, or “Slack events” allow you to select how the workflow will begin

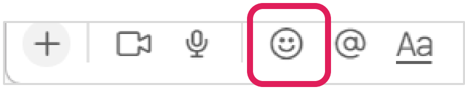
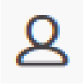
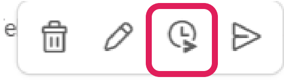
Trigger - 🔗From a Link in Slack

- For on-demand workflows
- Once workflow link is created:
  - Post link in channel or a canvas
  - Or use slash commands /[workflow name]
    - Will post message in channel allowing anyone to run in the channel
    - Press "Start Workflow"
- Can run multiple times.

**Note: Your workflow determines how each trigger will start in the specific channel you've chosen

Other Triggers

1. **More Folder** 

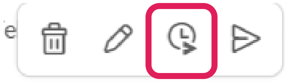
    - Your workflow starts when someone selects **Automations** from the **More…** folder's dropdown menu.
    - These workflows are easily accessible by members of a channel and can be used anytime.
2. **Emoji Reaction** 
    - Your workflow starts automatically when someone in the channel adds a certain emoji reaction to a message.
3. **New Channel Member** 
    - Your workflow starts automatically when someone joins the channel.
4. **Scheduled Date & Time** 
    - Your workflow starts automatically at a set date and time.
5. **List update** 

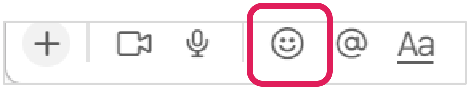
    - When the selected list is updated, your workflow will start
6. **Canvas update** 

    - When the selected list is updated, your workflow will start.

**Note: Your workflow determines how each trigger will start in the specific channel you've chosen

Other Triggers

1. **On a schedule** 
   - Your workflow starts automatically at a set date and time.

2. **When an emoji reaction is used** 

   - Your workflow starts automatically when someone in the channel adds a certain emoji reaction to a message.

3. **When a person joins a channel** 
   - Your workflow starts automatically when someone joins the channel.

4. **When a list item is updated** 

   - When the selected list is updated, your workflow will start

**Note: Your workflow determines how each trigger will start in the specific channel you've chosen

Advanced Triggers

1. **From a webhook** 
   - Workflow starts automatically when a custom webhook sends a web request to Slack from another app or service.
   - Creating workflows with webhooks requires more technical expertise.

**Note: Your workflow determines how each trigger will start in the specific channel you've chosen

Steps

- Steps are a series of actions taken to complete a workflow.
- Add a step that launches right after someone starts your workflow.
- Once your workflow starts, your steps appear in the order you specify.
- Steps can collect or send information in Slack, or between Slack and other services.

Steps

- Types of steps:
    1. Canvas
    2. Channels
    3. Forms
    4. List
    5. Messages
    6. Users
    7. Workflow Control
    8. Custom
    9. Steps from apps installed to your workspace (If applicable)

What Each Step Does

Canvas

- Take actions on new or existing canvas in Slack
- Actions include:
  - Create a canvas
  - Create channel canvas
  - Share a canvas
  - Share canvas in thread
  - Update a canvas

Channels

- Manage channels with workflows.
- Actions include:
  - Add a Bookmark to a channel
  - Add users to a channel
  - Archive a channel
  - Create a channel
  - Pin a message
  - Update the channel topic

What Each Step Does

Forms

- Add forms to organize and collect information.
- Forms can include custom responses, or prompt people to choose options from a list.
- Completed forms can be sent to a channel or specific person via DM.
- Note: Form responses cannot be edited once submitted via Workflows.
- Answer types supported for questions include:
    - Line of text
    - Paragraph
    - A User
    - Multiple users
    - A Channel
    - Multiple Channels
    - Dropdown
    - Multiple Choice
    - Checkboxes
    - Date and Time
    - A Number

List

- Manage new and existing lists from workflows
- Actions include:
    - Add an item to a list
    - Copy a list
    - Delete a list item
    - Send notification to activity feed
    - Share a list with people
    - Update a list item

What Each Step Does

Messages

- Send messages to communicate information to the person who kicked it off, or others in Slack who need to take action from the information.
- Messages can be sent to:
  - Specified people (Direct messages)
  - Channels
  - Threads
- Messages only visible to recipient(s)
- Messages are automatically formatted and can include hyperlinks.

Users

- Create a user group or add or remove users from a user group.

Workflow Control

- Ability to delay your workflow by adding a timer in minutes.
- Causes workflow to wait that selected time.

Customize with Buttons & Variables

Customize steps with buttons and variables.

- Helps reference information.
- Allows pausing at a certain step while people take an action.

Buttons

- Workflow won't proceed until button is clicked.
- Buttons can only be clicked once per workflow.
- Don't add when multiple people use the workflow — e.g., a scheduled date & time workflow reminder for a team to share daily status updates.

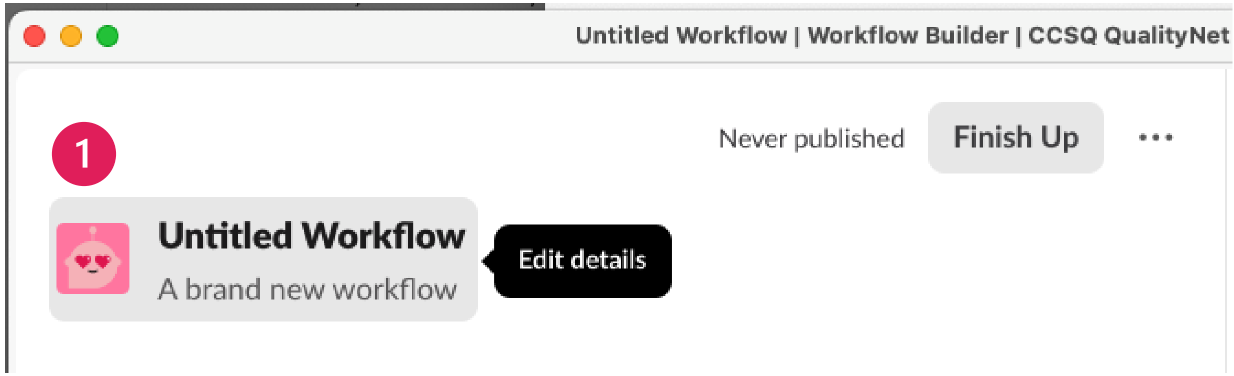
Variables

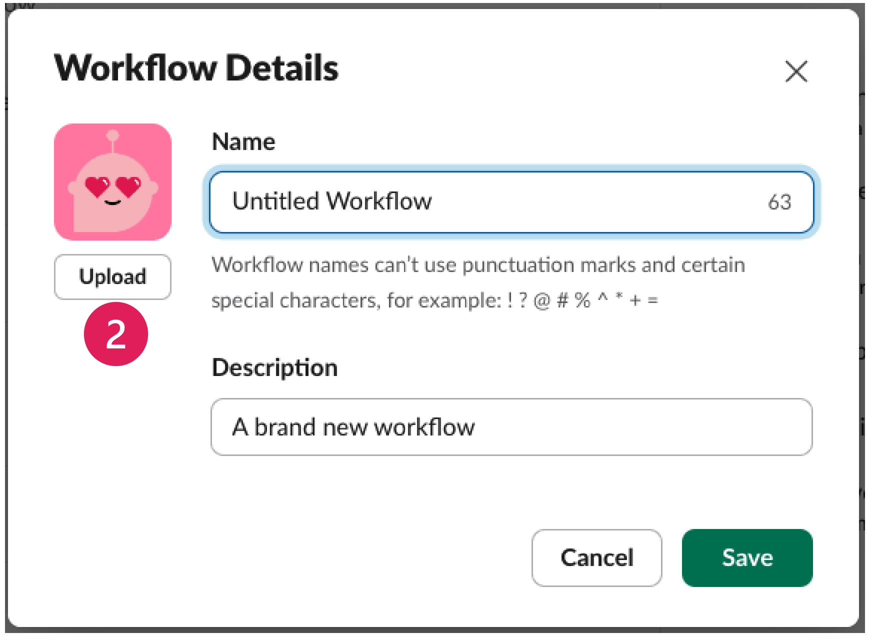
- Allow you to insert information from previous steps in your workflow in subsequent steps, giving more flexibility to personalize workflows and connect information across various steps.
- Available variables depend on:
  - how the workflow starts
  - who interacts with steps at various points
  - information requested (like responses to a form)

Add a Custom Icon

Add a custom workflow icon

1. Open your workflow.
2. Click the **workflow icon to** edit details.
3. Select **Choose File** to upload a file.
4. Crop your icon if you'd like.
5. Click **Save**.





Workflow Managers

- Grant others permission to manage a workflow.
- Managers have same permissions as the workflow creator.
  - Change a workflow's name and custom icon
  - Edit or remove workflow steps
  - Unpublish or delete a workflow
  - Manage workflow Managers
    - Add and remove other Managers, including admins
- Workspace Owners and Admins can add themselves as Managers on any published workflow in their workspace.
  - If they add themselves in private channels they don't belong to, they won't be able to see the name of the channel

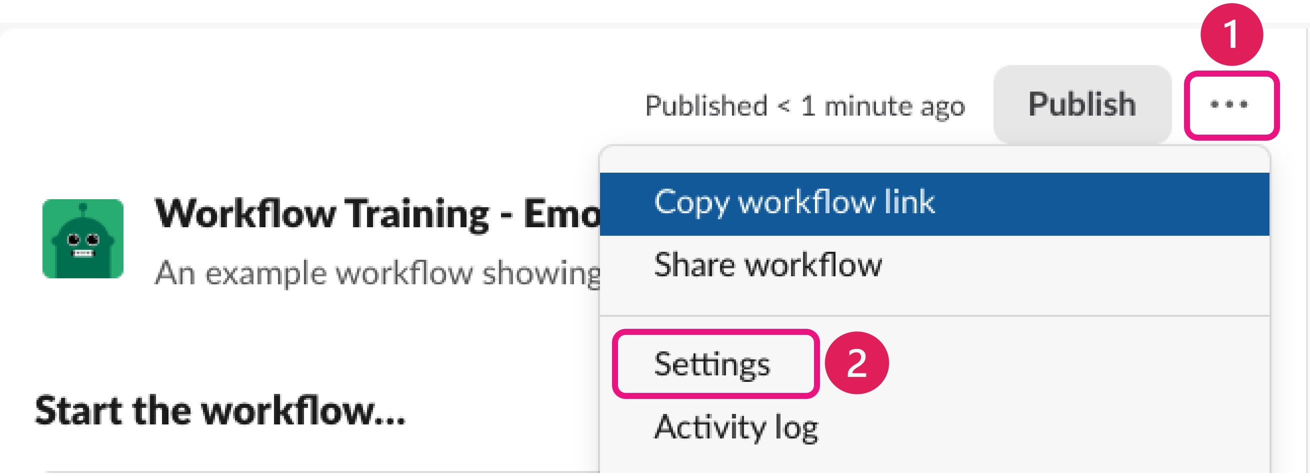
****Tip:** Only Managers can view a workflow before it’s published!

Adding Managers
Steps 1-3

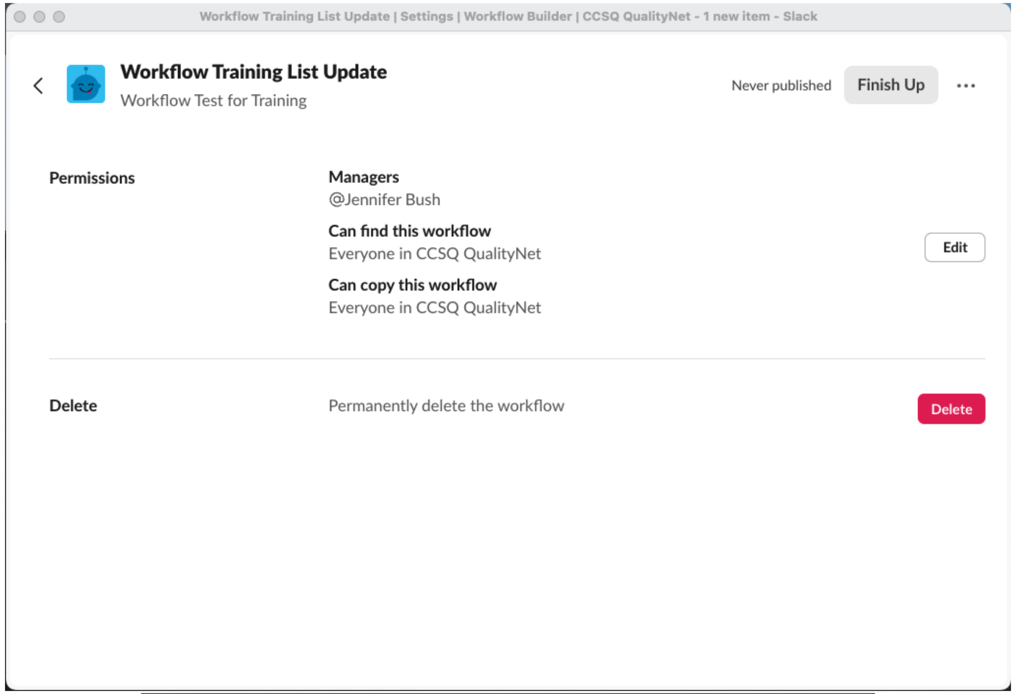
- Select **Tools** from the CCSQ Workspace menu, then click **Workflow Builder**.

  -or-

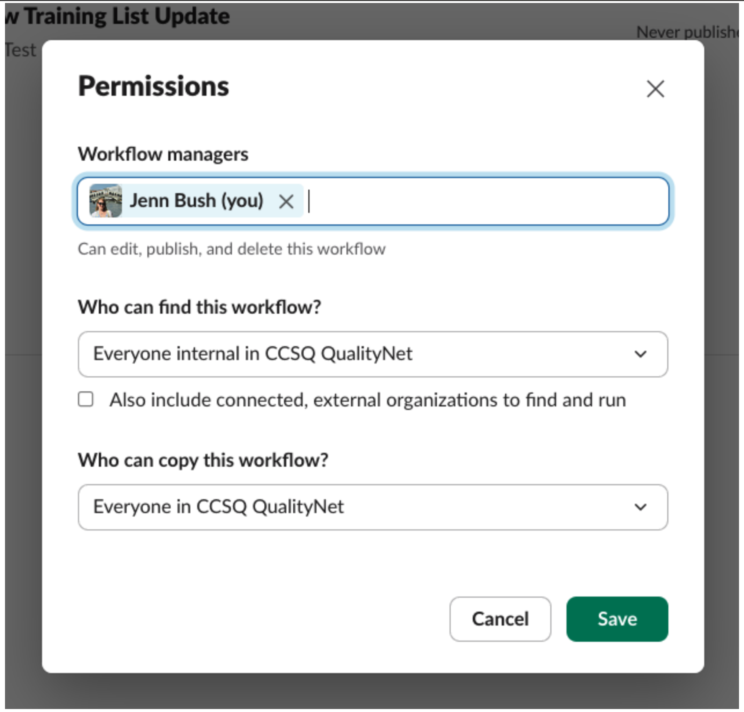
- Select **More** from your sidebar then **Automations**
- Click **Managed by you** on the top left of under Automations, then select a workflow from the list.
- Click the 3 dots at the top then select **Settings**.



Adding Managers *Steps 4-7*



- Click **Edit** next to the **Permissions** section.
- Search for people you'd like to add, then select their names from the drop-down menu.
- Slackbot will notify each person to let them know they've been added as a Manager.
- Click **Close**.



- *Note: You can always remove Managers by clicking the **x** next to the name of any Manager.

Testing Workflows Before Publishing

Want to check how your workflow behaves?

- Add it to a test channel.
- Try it out.
- Click Edit to make changes.
- Move the workflow to your preferred channel.
- Publish the changes.

Publishing Workflows

Pick a **name** for your workflow. (e.g., “Welcome to the team!”; “Meeting time”; “Agenda”) before publishing.

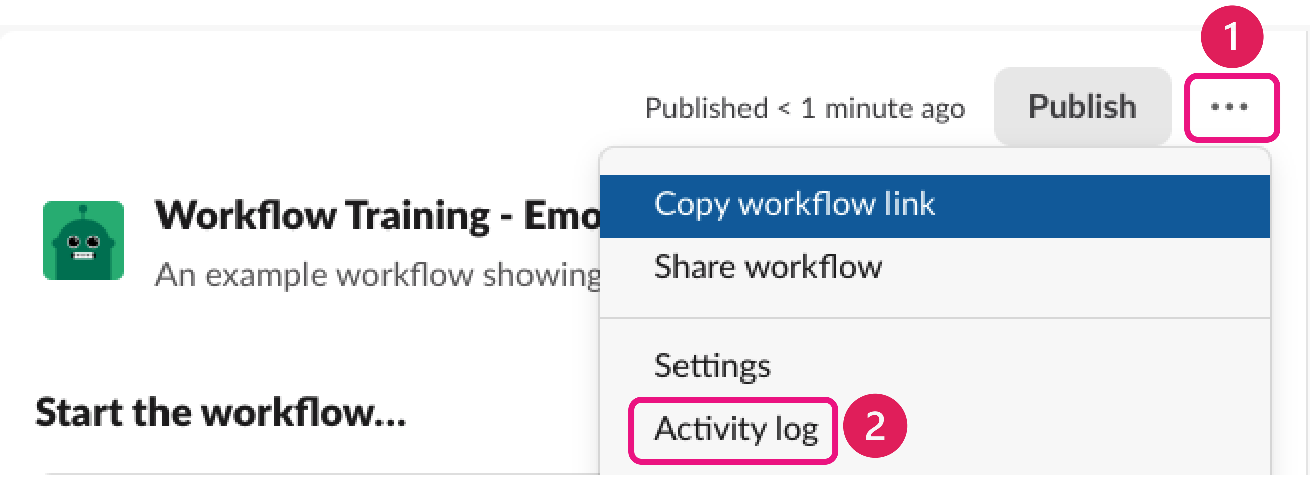
Once a workflow is published, it will launch each time it’s triggered.

Your workflow will post a message to the channel to let all members know it's been added.

Tracking Workflows

The Activity Tab

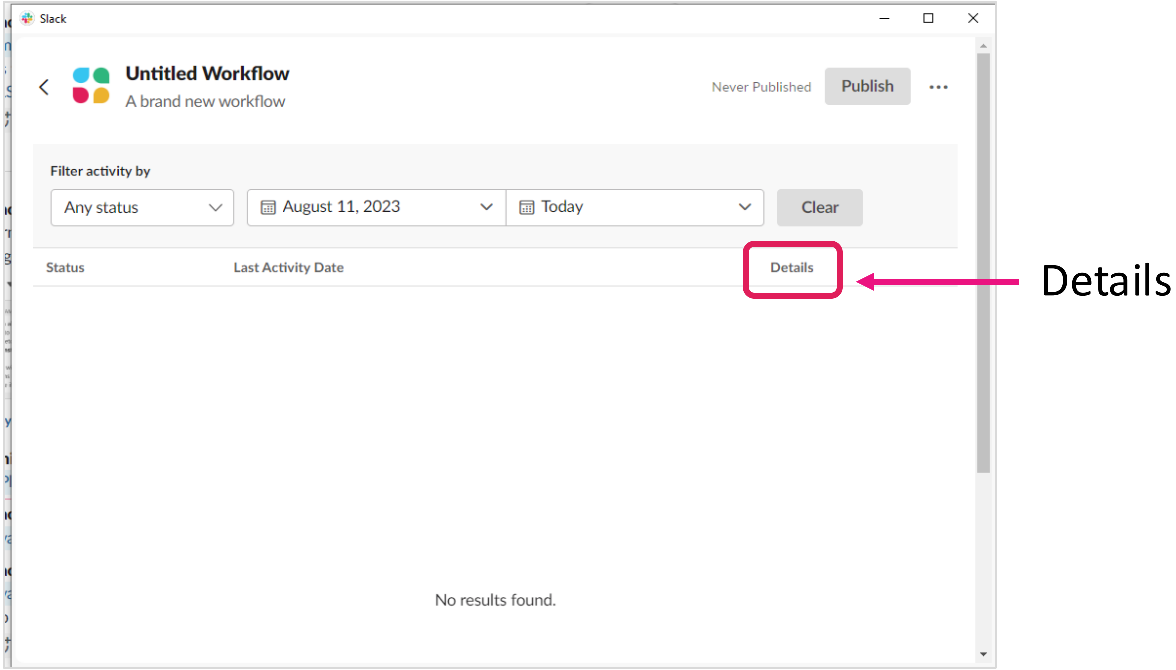
The **Activity log** tracks each time a workflow is activated.

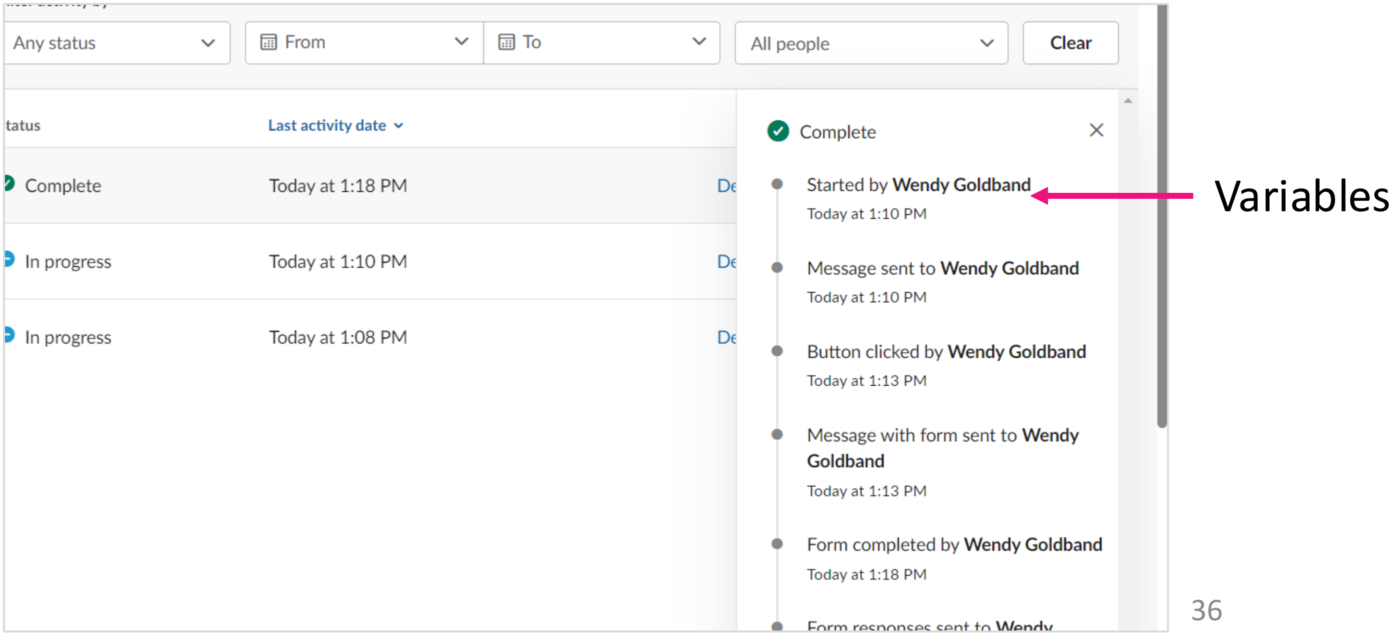


Tracking a Workflow in the View Activity Log

Tracking workflow activity

1. Open your workflow in Workflow Builder.
2. Click **Activity** tab at the top of the screen.
3. Click **Details** next to each activity date.
4. Variables chosen like name and time will be in the details for each **Status** listing.





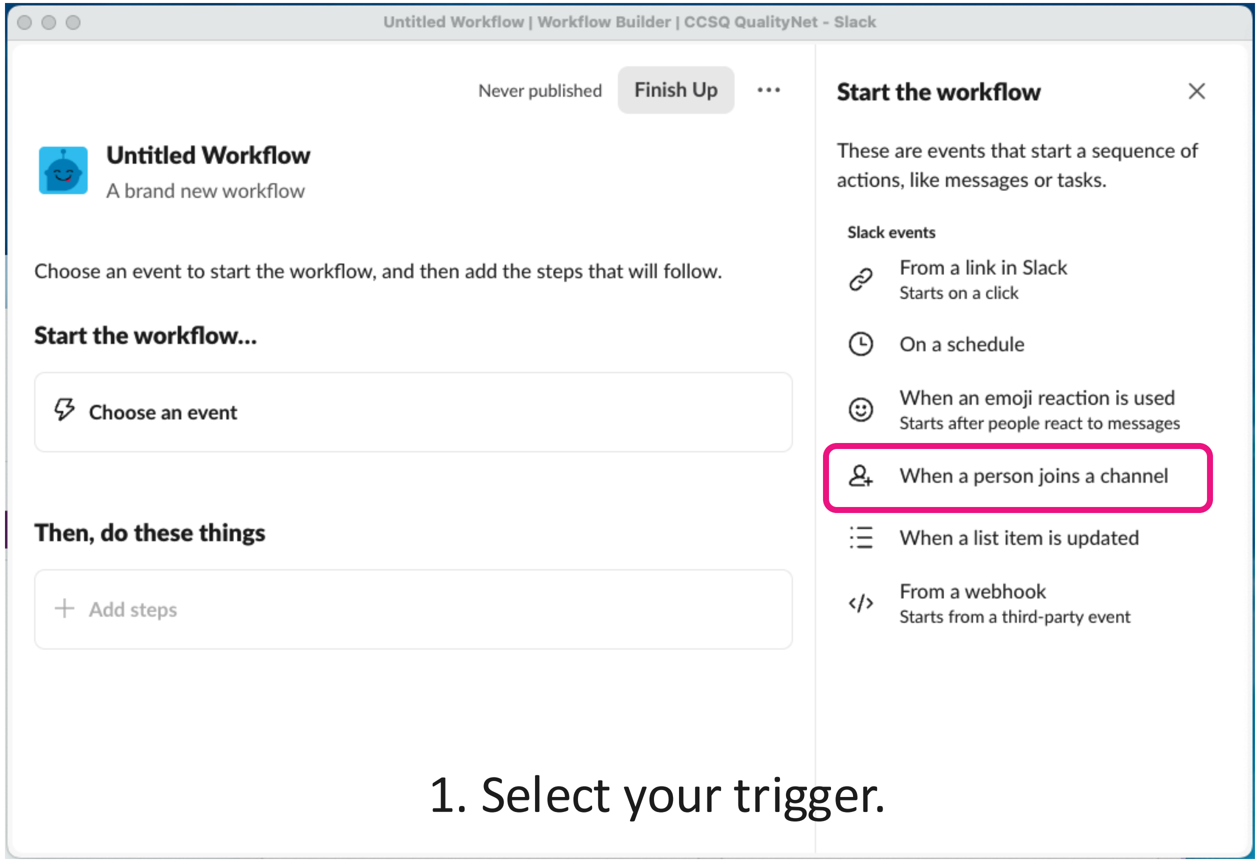
Download Form Responses as a CSV File

1. Click the top left **CCSQ workspace menu**.
2. Select **Tools**.
3. Click **Workflow Builder**.
4. Find the workflow you'd like to download under the **Workflow tab**.
5. Click the **three dots icon**.
6. If your workflow includes multiple forms, you must select only one at a time from the drop-down menu.
7. Receive a direct message from Slackbot with a link to the file when it's ready.
8. Select **Download form responses**.
9. Click **Save**.

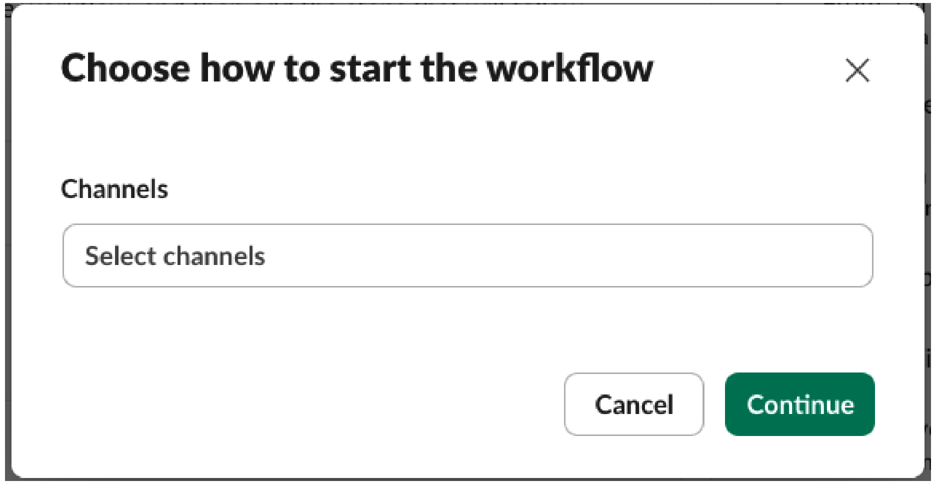
**Note: Form responses can only be downloaded for workflows with a form step included.

New Channel Member Trigger

New Channel Member Trigger

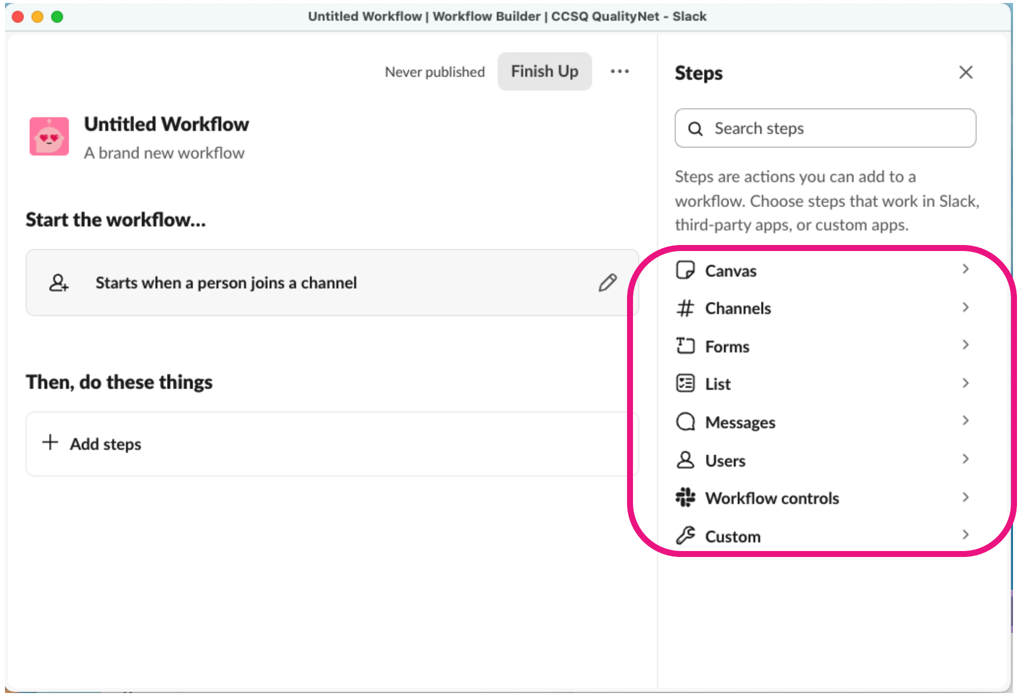


1. Select your trigger.

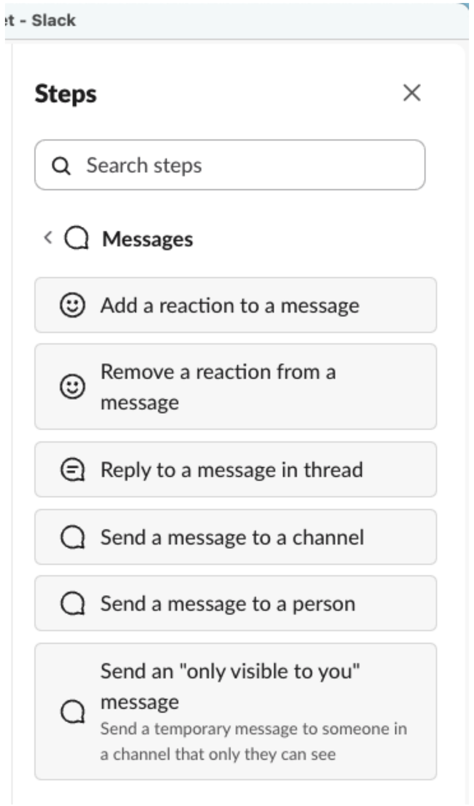


2. Select your channel

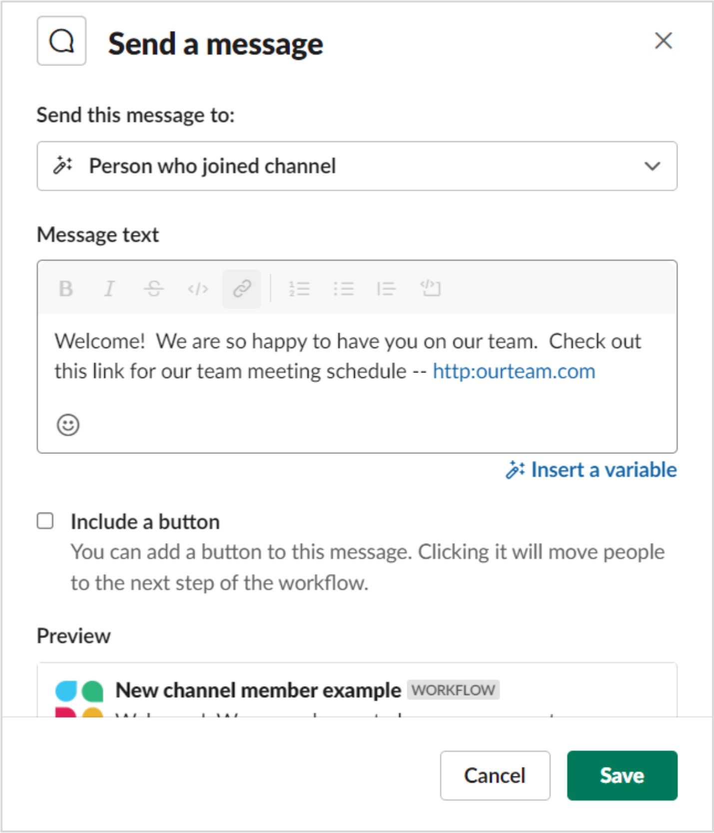
New Channel Member Trigger



1. Select a Step category on the right side.

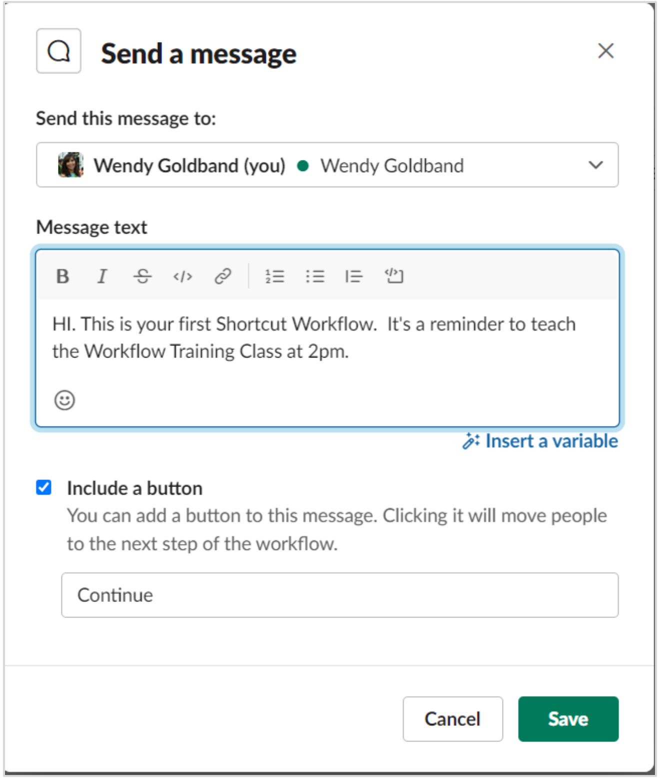


2. Select your Step.



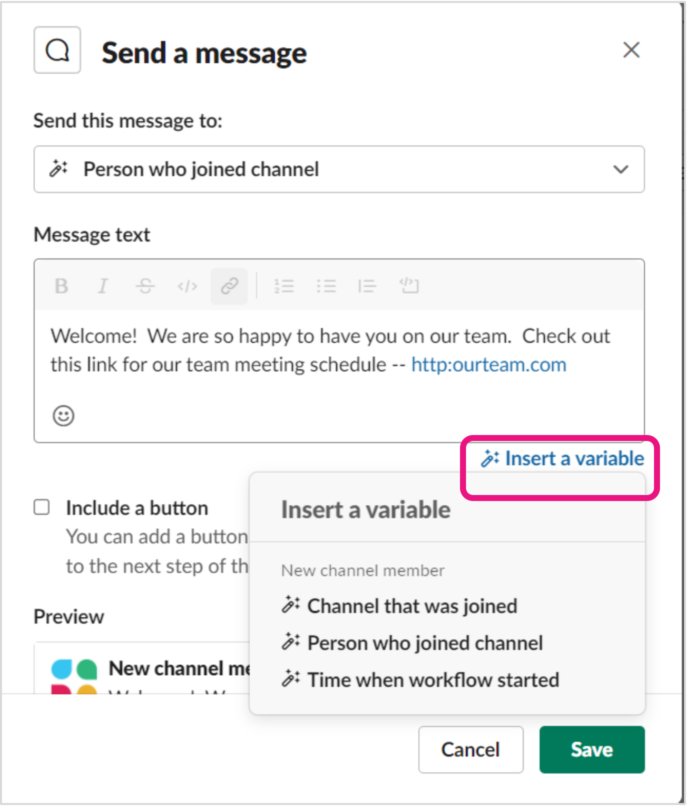
3. Customize Step 1.

New Channel Member Trigger

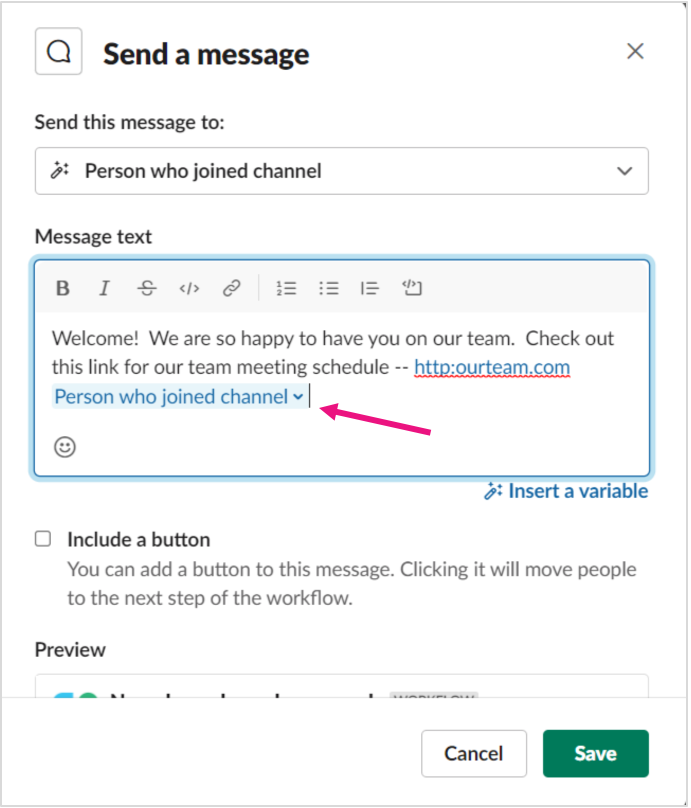


Send a message

1st step selected and customized

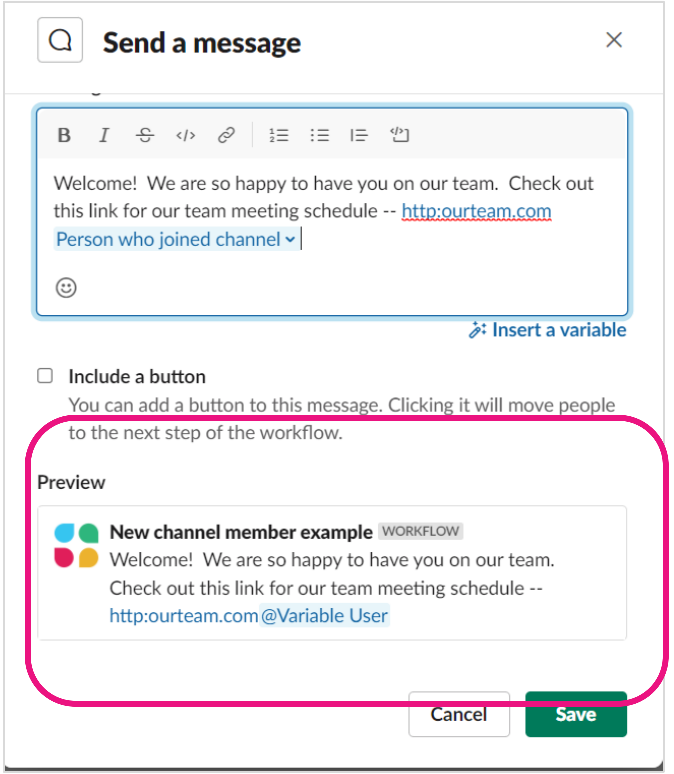


Option to insert variables

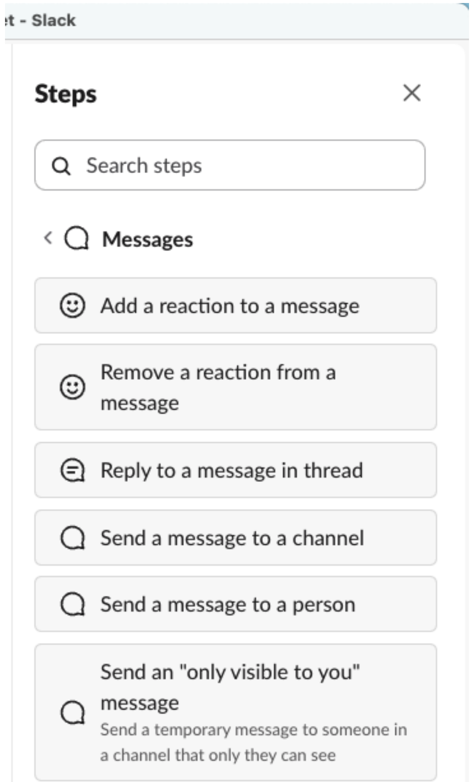


One variable chosen

New Channel Member Trigger



Preview the step.



Choose to add another step from the Steps menu on the right side if needed.

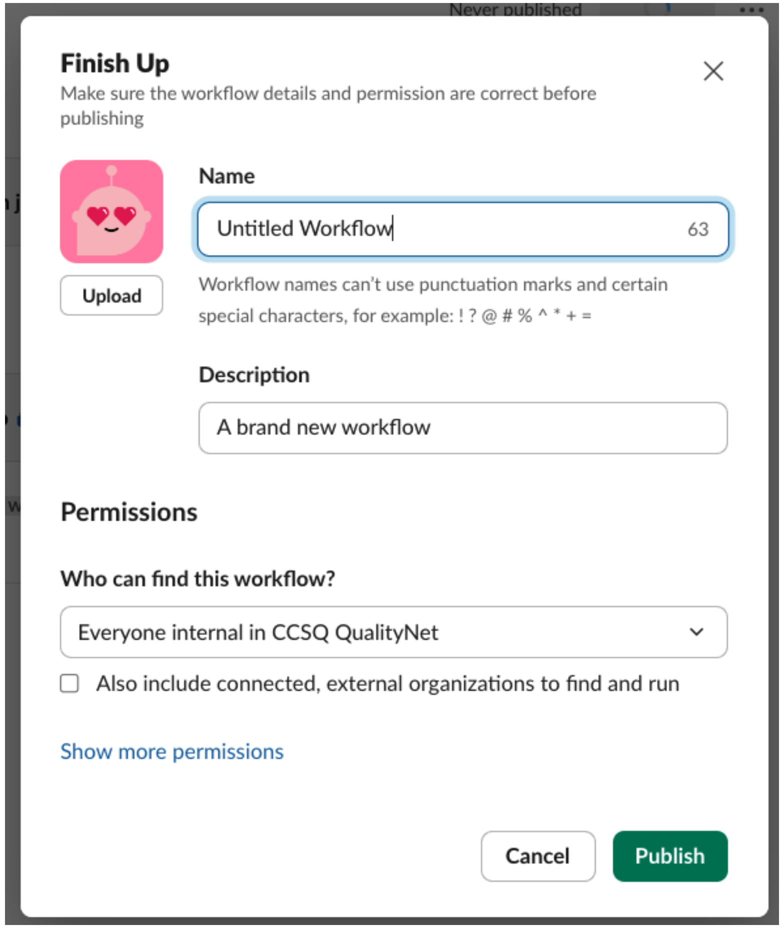
Final Steps

New workflows click the **Finish Up** button in the top right.

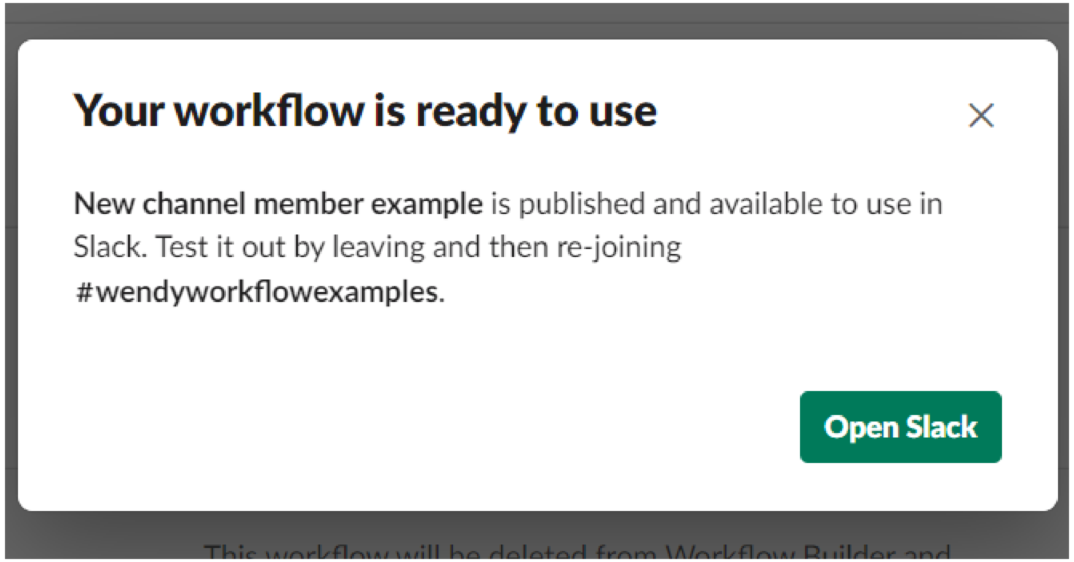
1. Give your workflow a **name**, **description**, and a **workflow icon**.

2. Select **Permissions** if applicable.

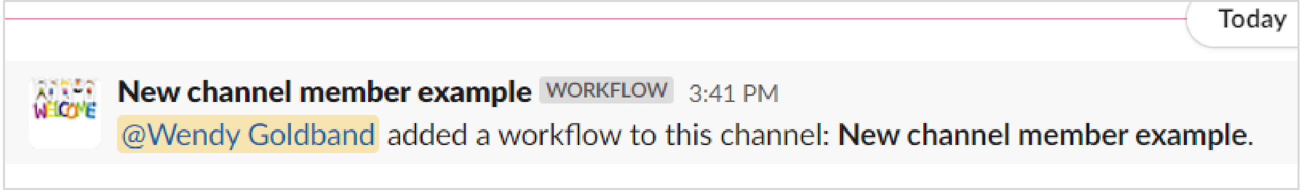
3. Click **Publish**



Published Workflow
New Channel Member Trigger



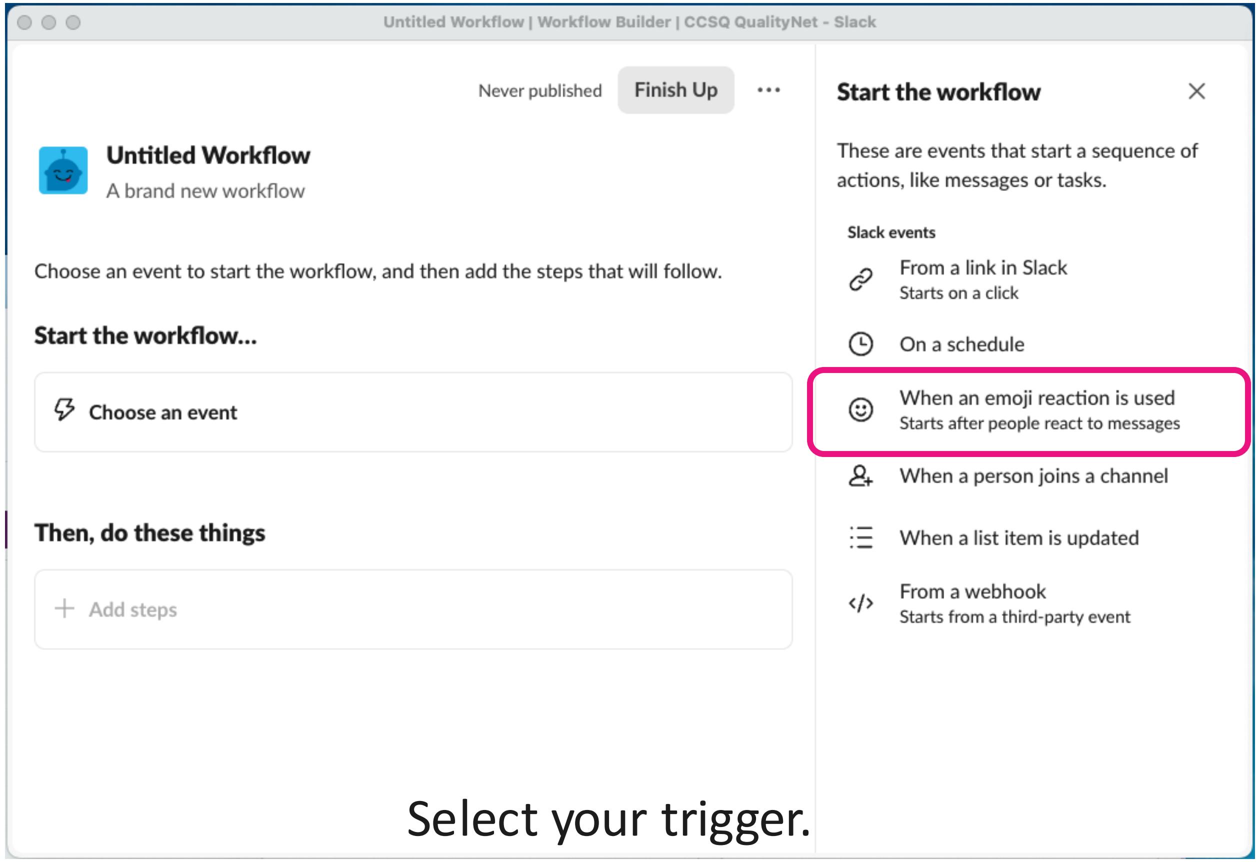
Workflow published



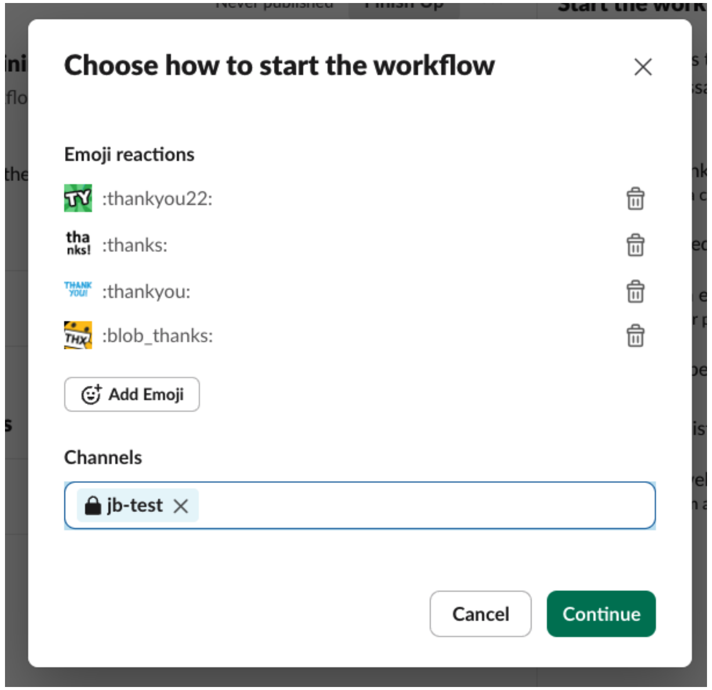
Published workflow message displayed in channel
(Note the custom icon.)

Emoji Reaction Trigger

Emoji Reaction Trigger



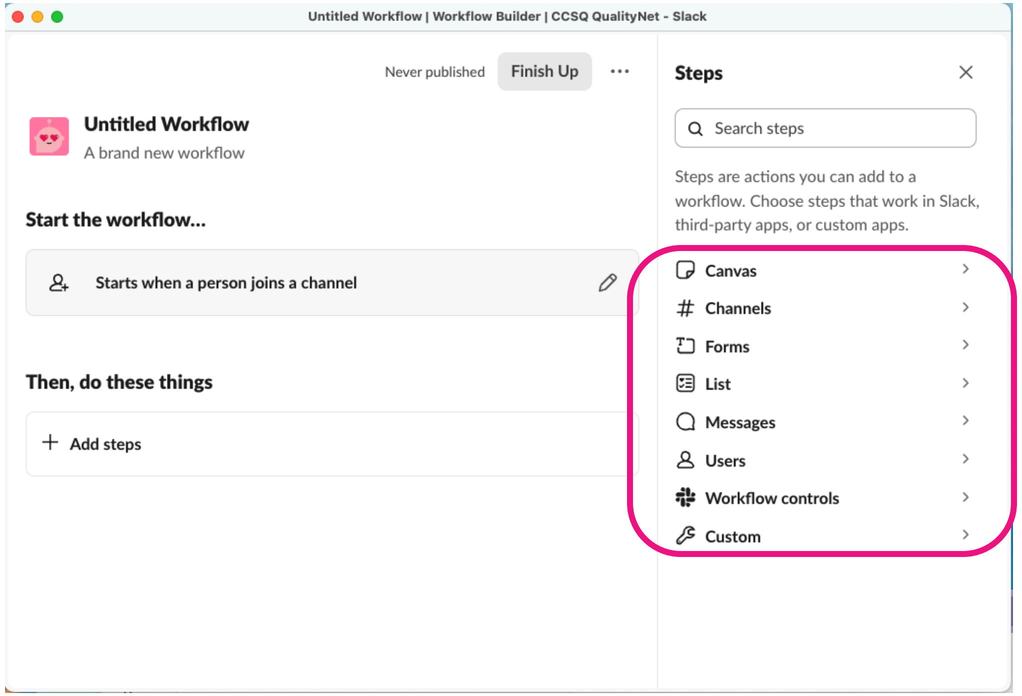
Select your trigger.



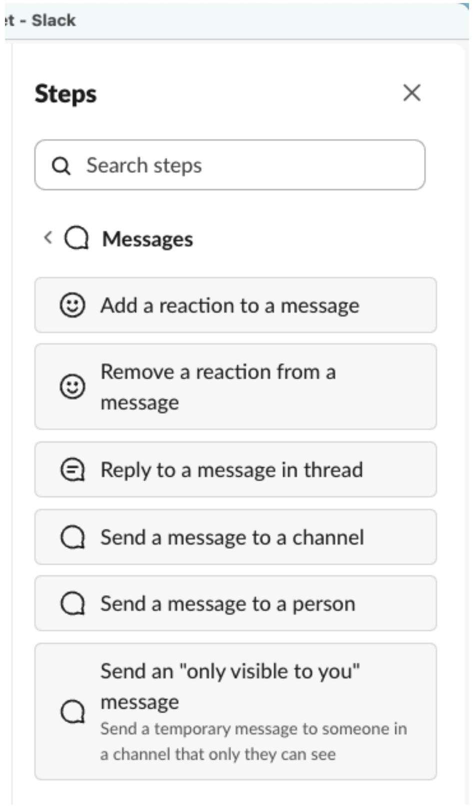
Customize your trigger.

- Select your channel.
- Add emoji reaction(s).

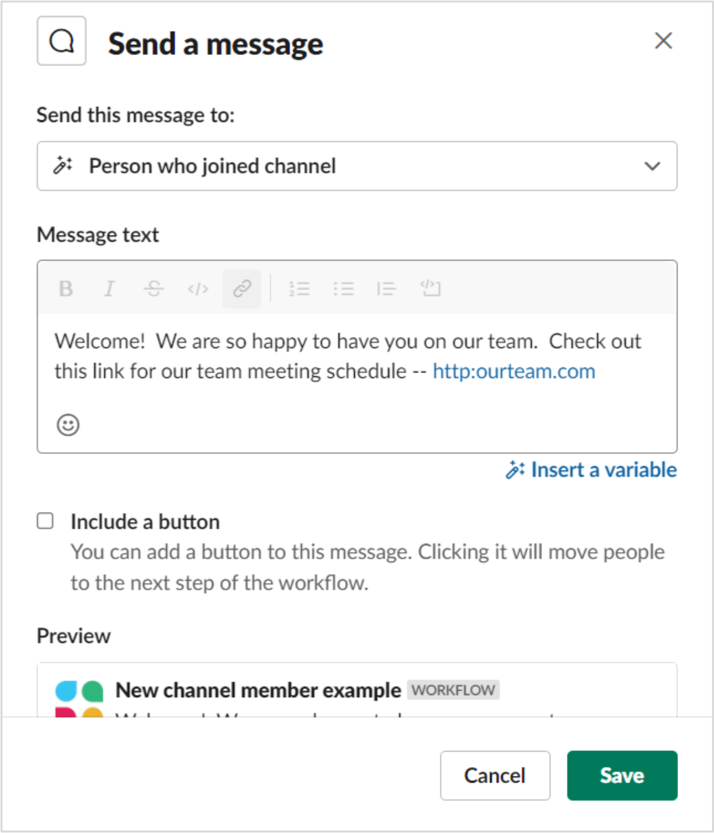
Emoji Reaction Trigger



1. Select a Step category on the right side.

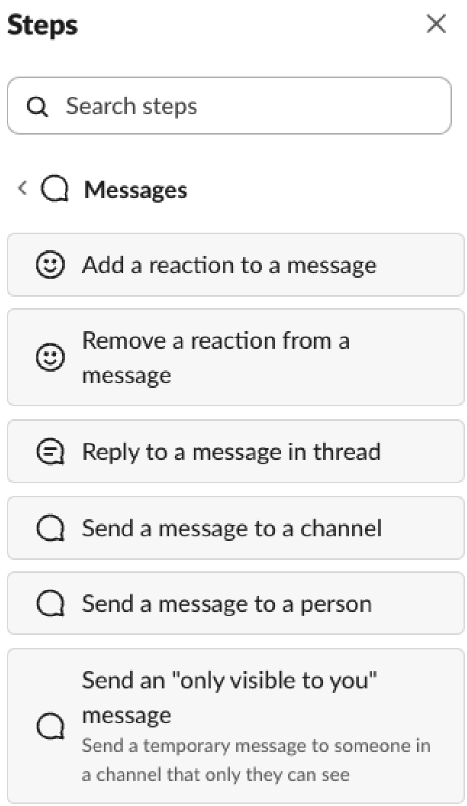


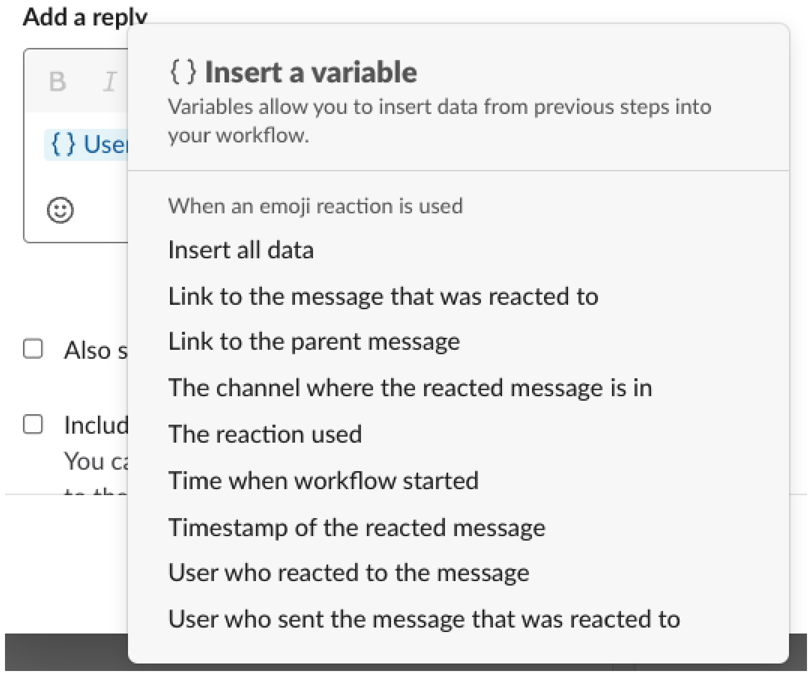
2. Select your Step.



3. Customize Step 1.

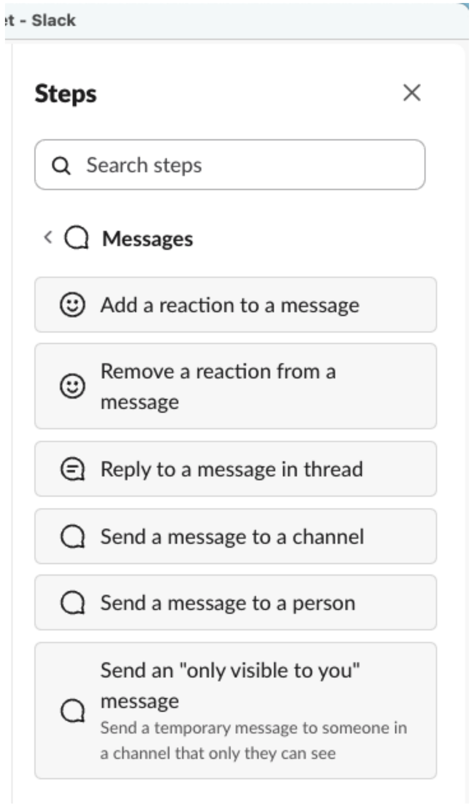
Emoji Reaction Trigger



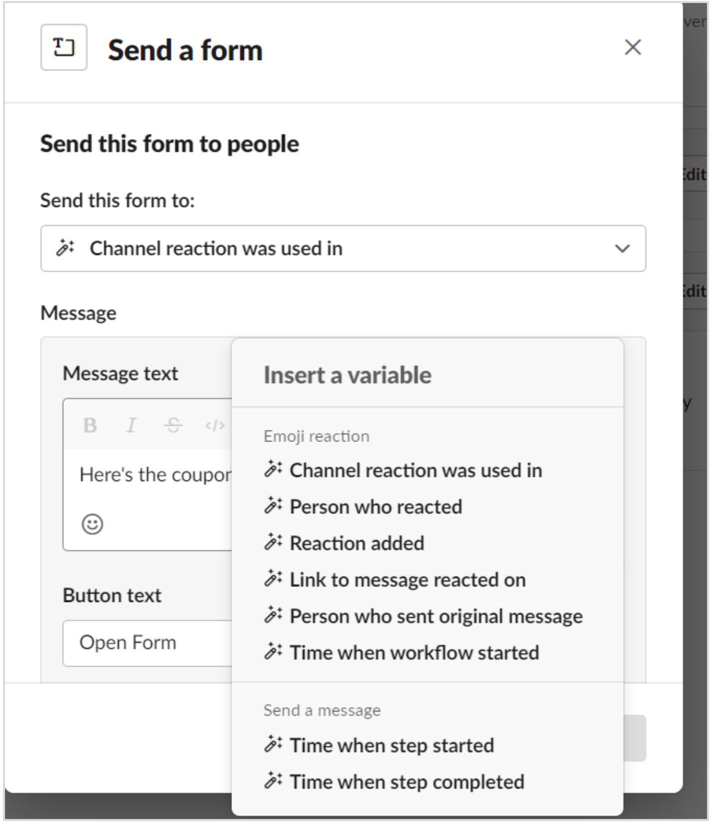


*Note greater recipient and variable selection for Emoji Reaction step when sending message.

Emoji Reaction Trigger



Choose to add another step from the Steps menu on the right side or Publish.

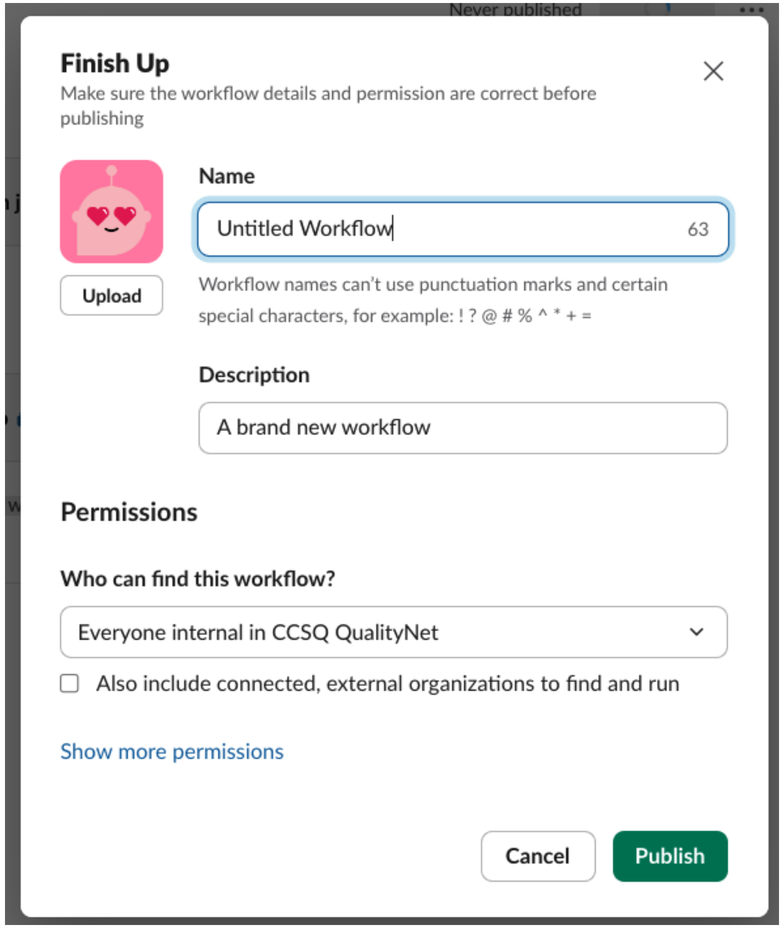


Here are some of the variables for sending a form in the Emoji reaction trigger.

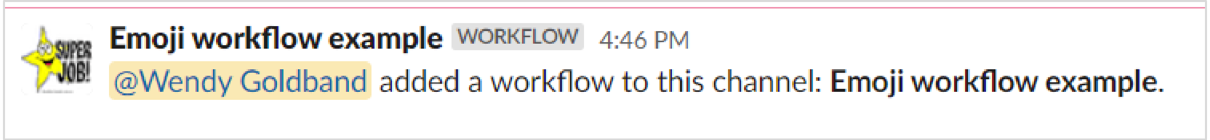
Final Steps

New workflows click the **Finish Up** button in the top right

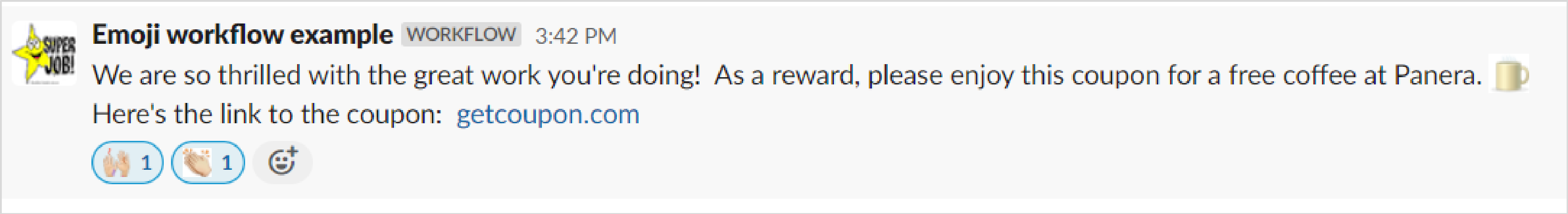
1. Give your workflow a **name** and **description**
2. Select **Permissions** if applicable
3. Click **Publish**



Published Emoji Reaction Trigger



Message that Emoji workflow was published is displayed in channel (Note the custom icon.)

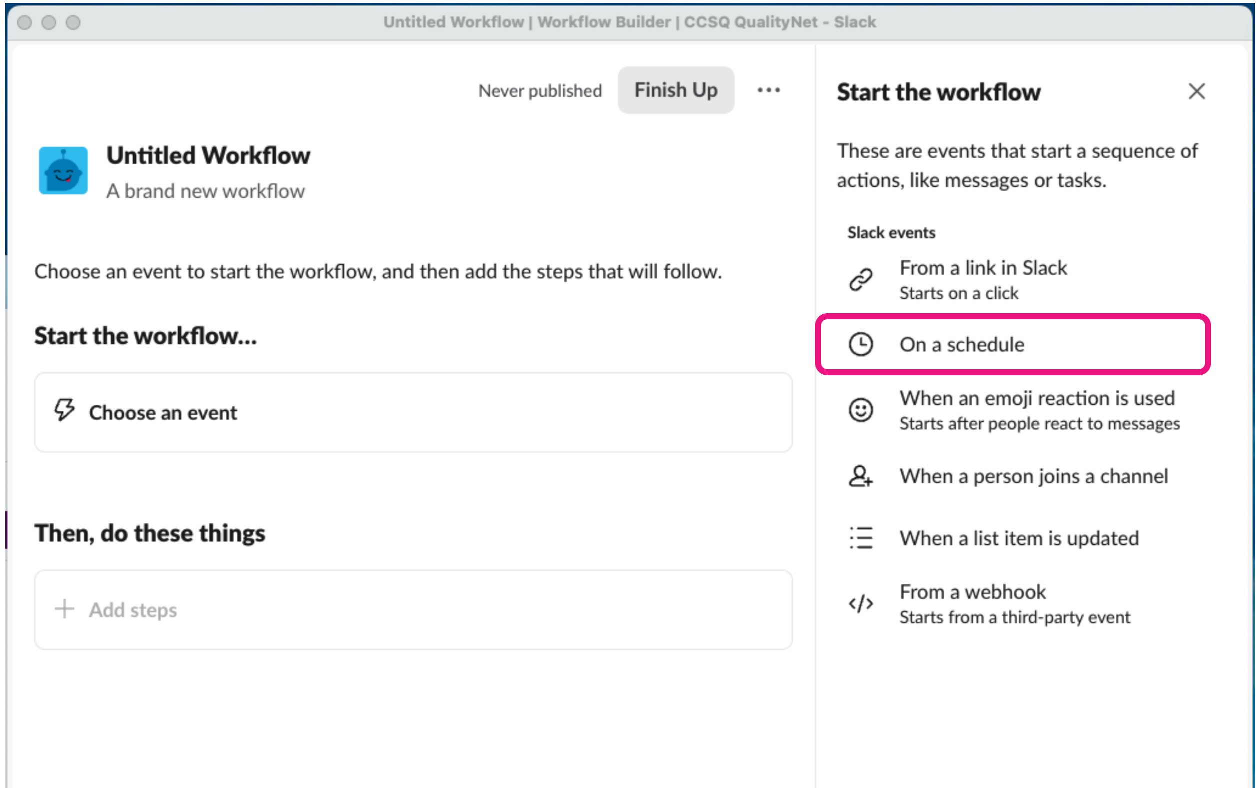


Here is the message triggered by an emoji reaction in the channel.

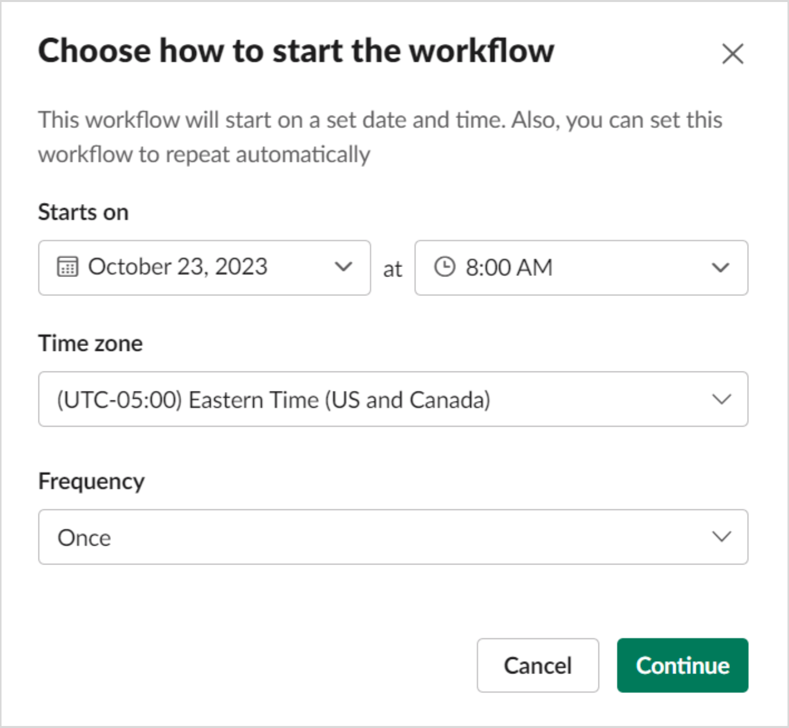
Note: Emoji must be placed as a reaction to another comment in order for the trigger to work. The emoji cannot be in a separate message of its own for the workflow to be triggered.

On a Schedule Trigger

On a Schedule Trigger

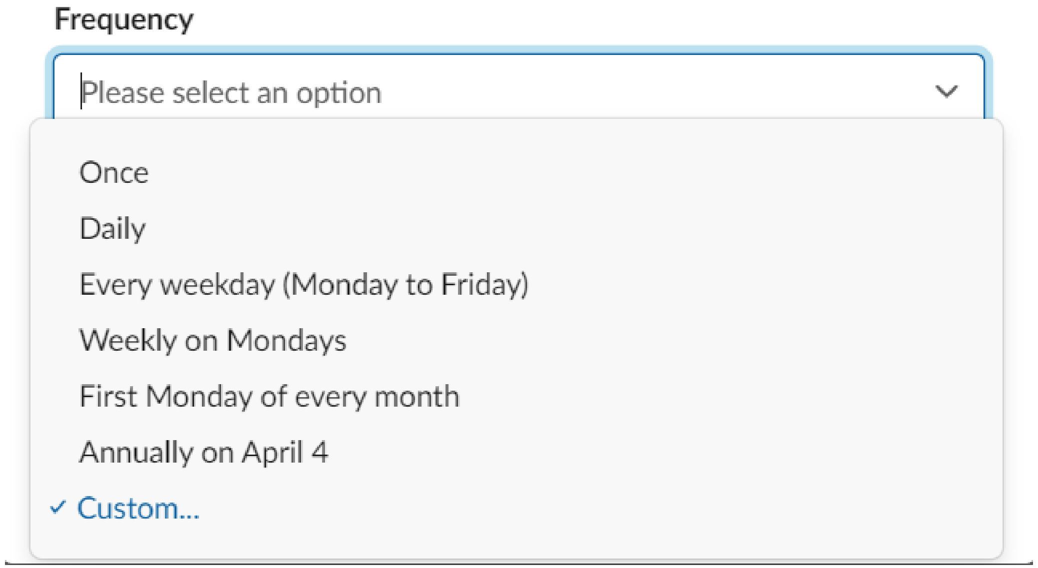


1. Select your trigger.

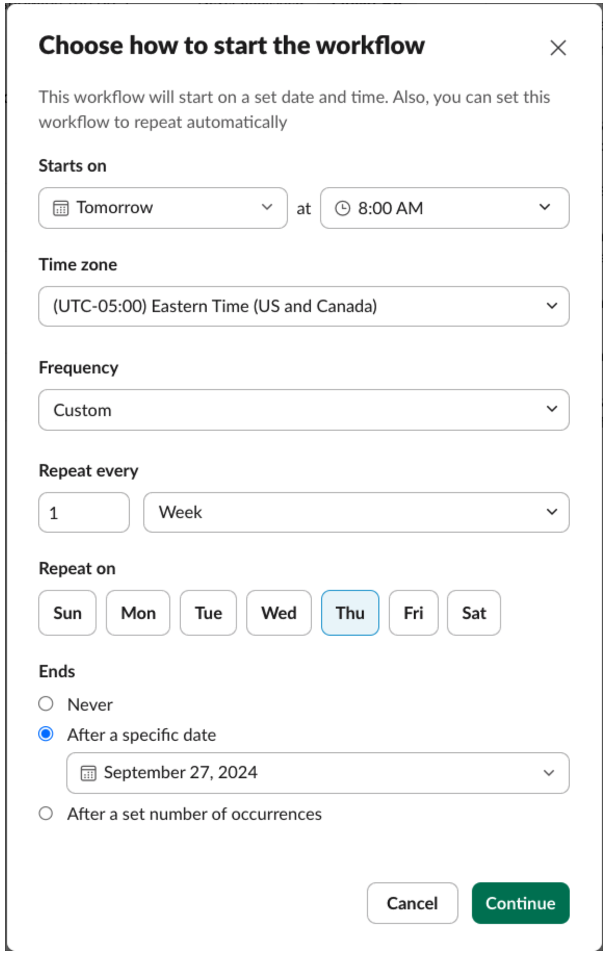


2. Customize your trigger.

On a Schedule Trigger

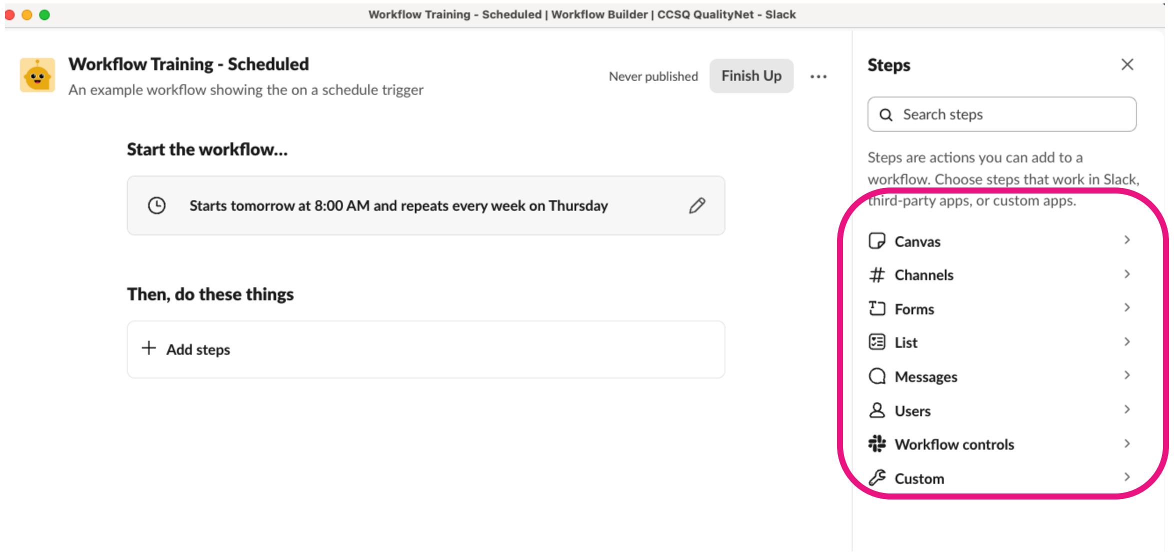


Select your **Frequency**.

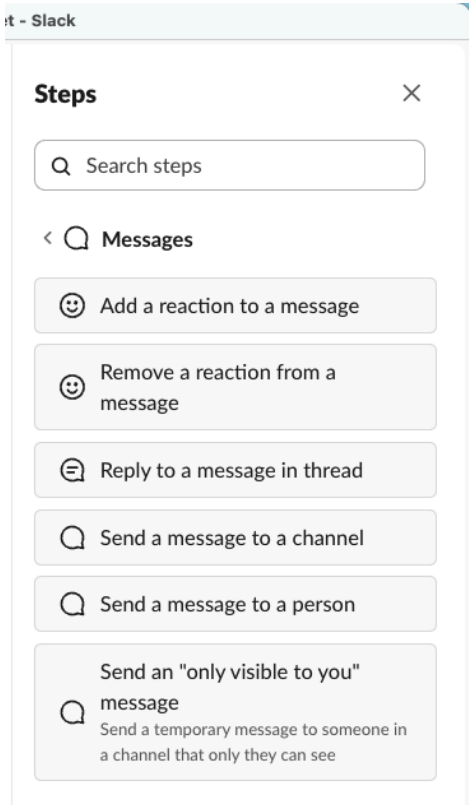


Custom Frequency Select:
date, **time**, how often **repeats**, & **end date** or **after a set number of occurrences**.

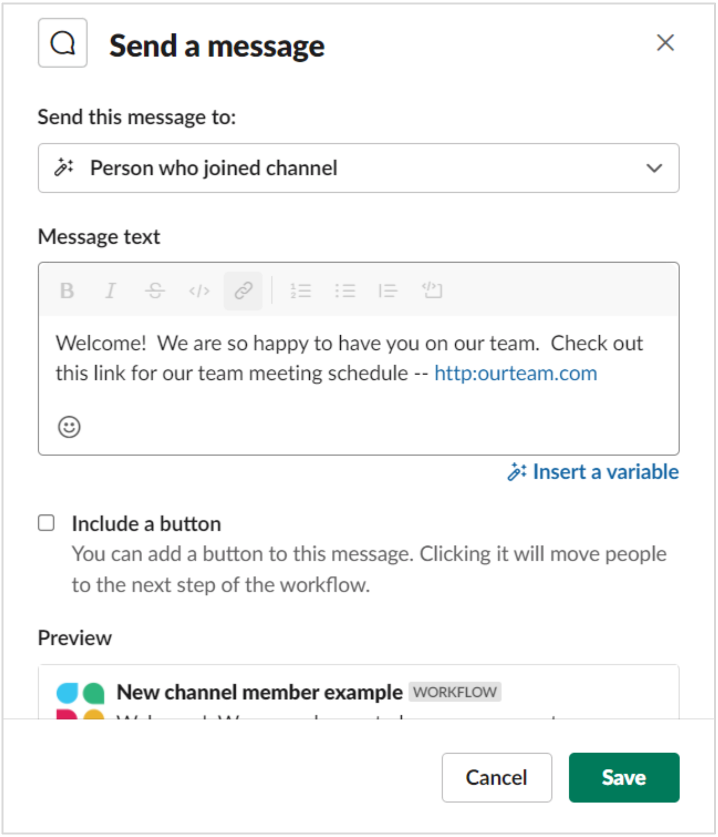
On a Schedule Trigger



1. Select a Step category on the right side.



2. Select your Step.

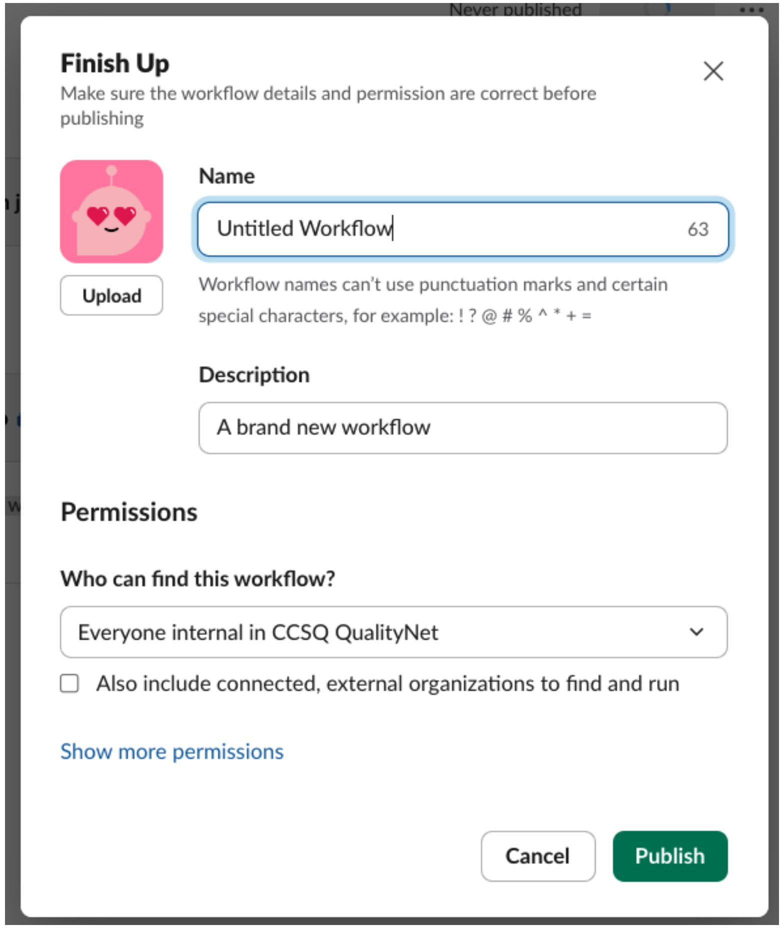


3. Customize Step 1.

Final Steps

New workflows click the **Finish Up** button in the top right

1. Give your workflow a **name** and **description**
2. Select **Permissions** if applicable
3. Click **Publish**



Miscellaneous Info & Examples

Workflow Templates

You can also create a workflow from available templates.

Open Workflows:

1. Click on workspace name **CCSQ QualityNet**.
2. Click **Tools** > **Workflow Builder**.

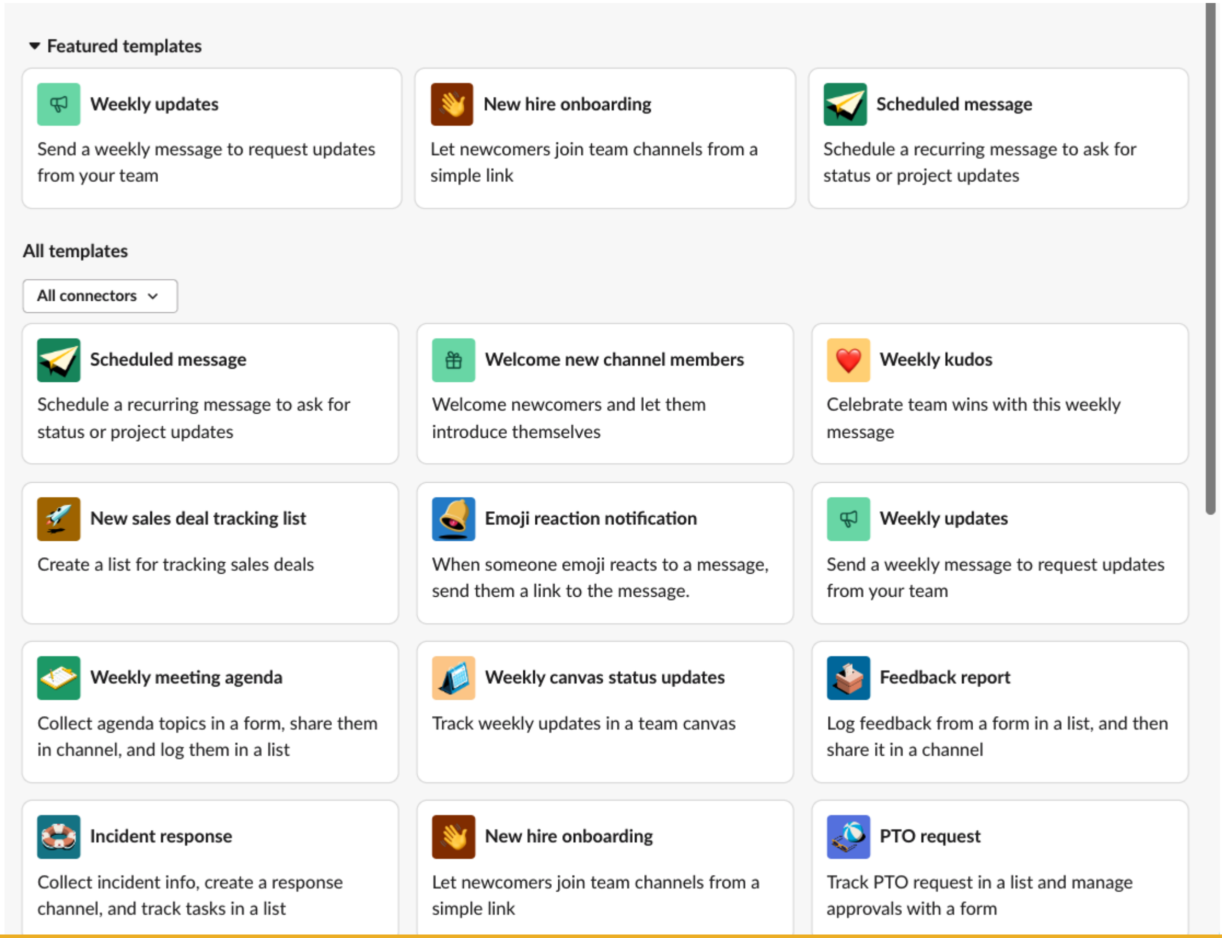
-or-

1. Click **More** > **Automations**.

View Templates:

1. Click your **Templates** on the left.
2. Select a template from the options on the right.

Workflow Templates



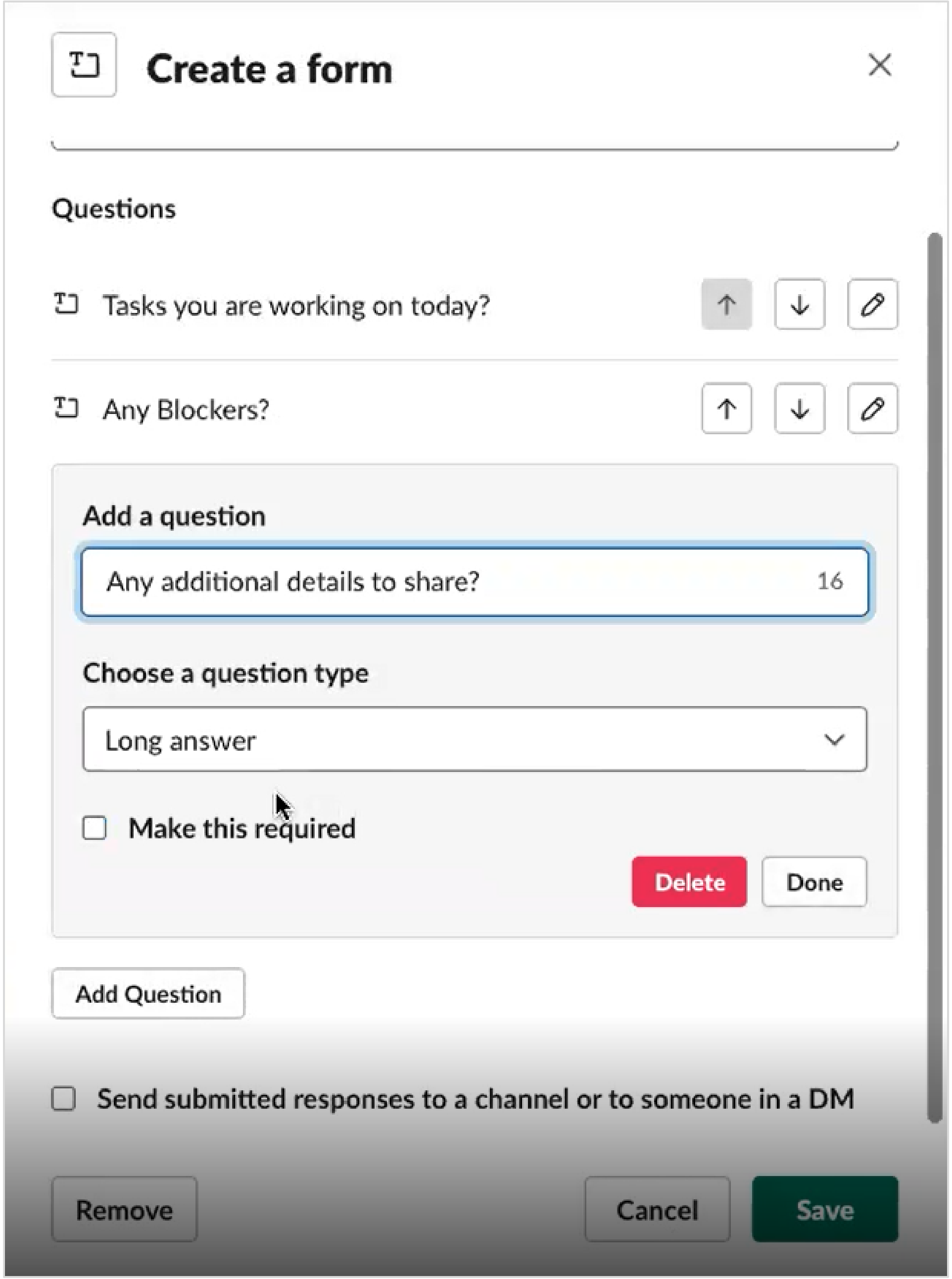
Learn more

- Learn more about helpful workflow templates:
  - https://slack.com/blog/productivity/workflow-builder-templates-remote-teams
  - https://slack.com/blog/productivity/automate-tasks-in-slack-with-workflow-builder

- Get Slack certified with workflows:
  - Take the **Automate business processes with Workflow Builder** Slack Certified badge course to strengthen your Slack workflow skills and earn a badge to share upon completion.
    - https://www.slackcertified.com/automate-business-processes-with-workflow-builder

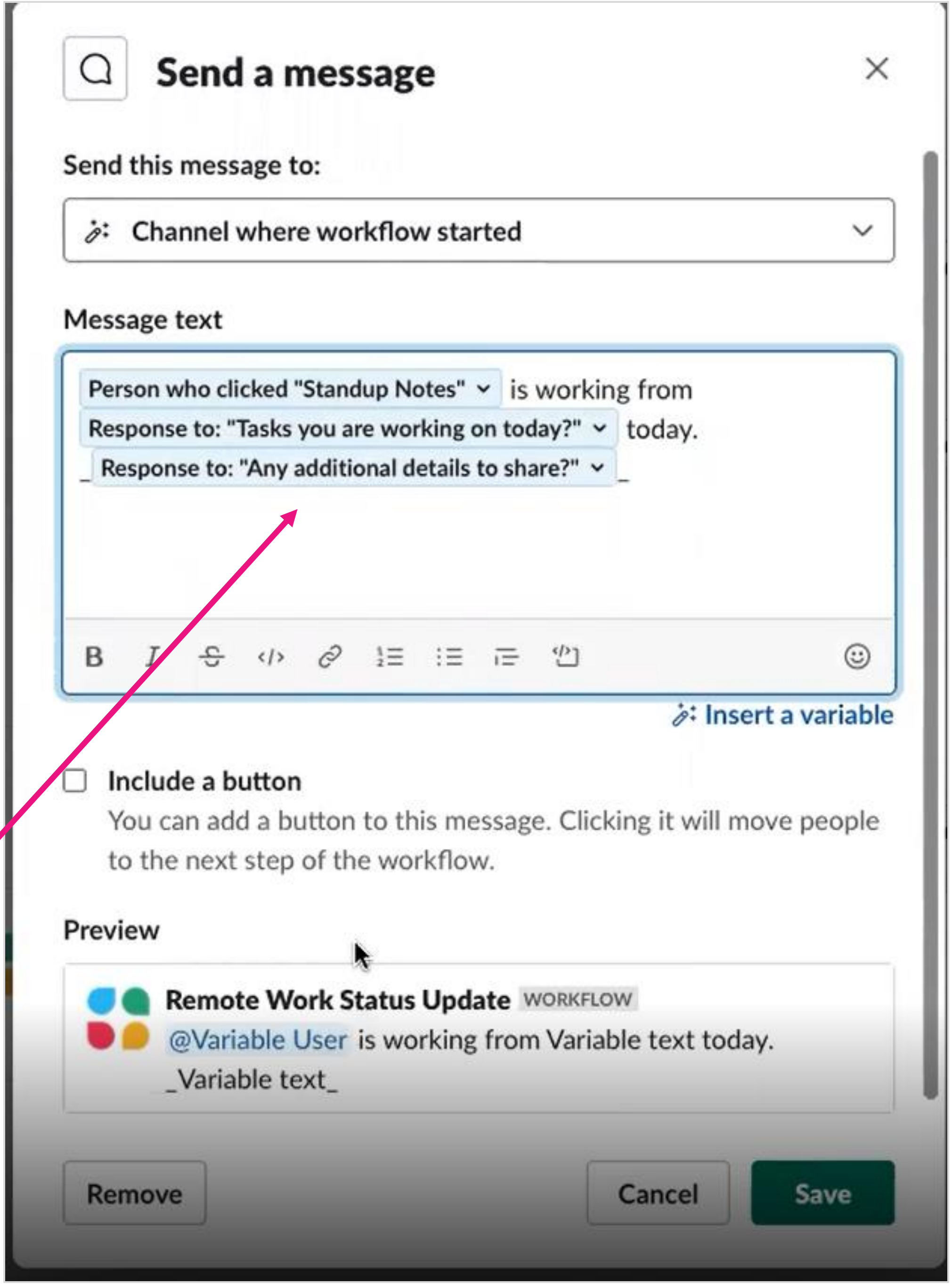
- If you're a developer, visit Slack API for details on building workflow steps for a Slack app.

Example of Standup Form

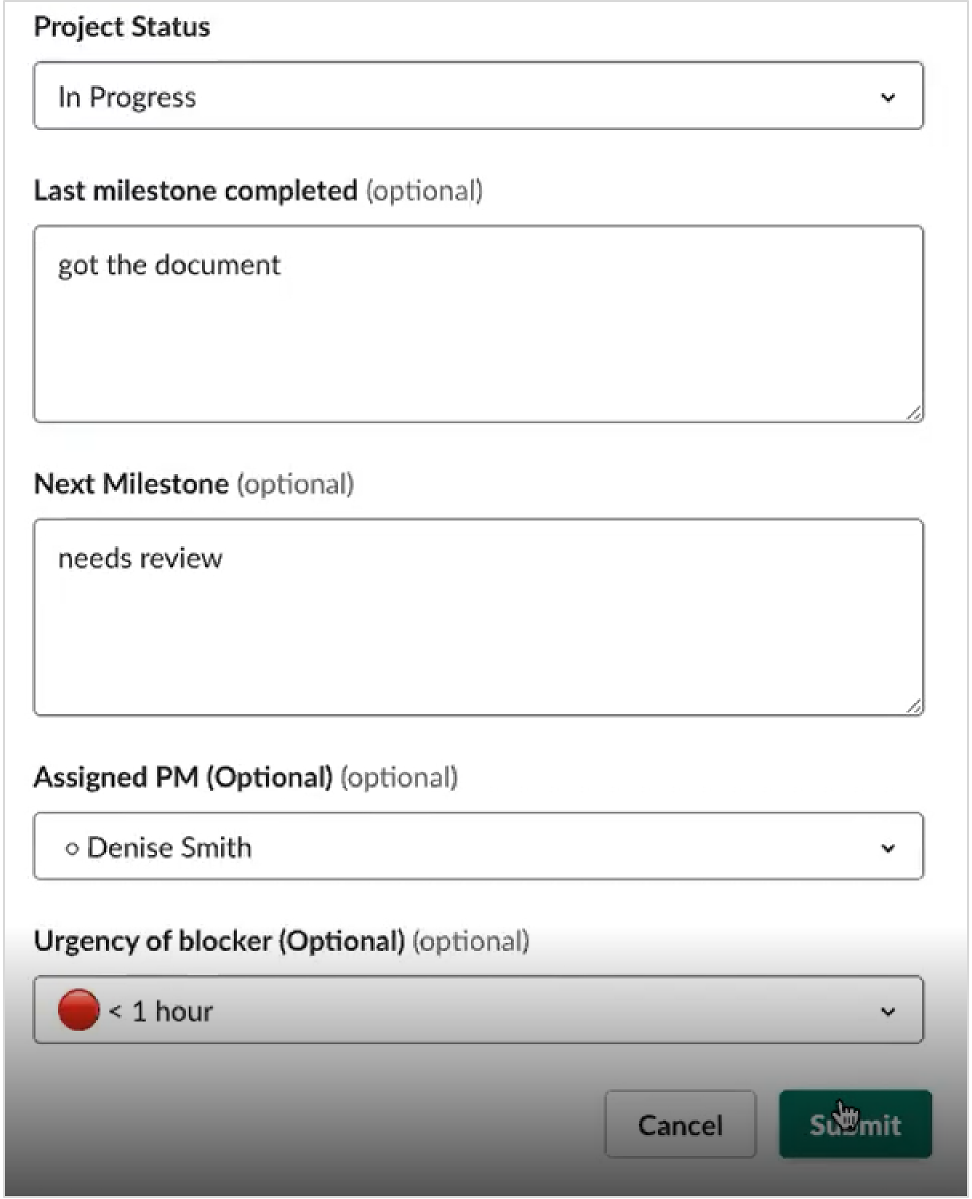


Example of Message to go with Standup Form

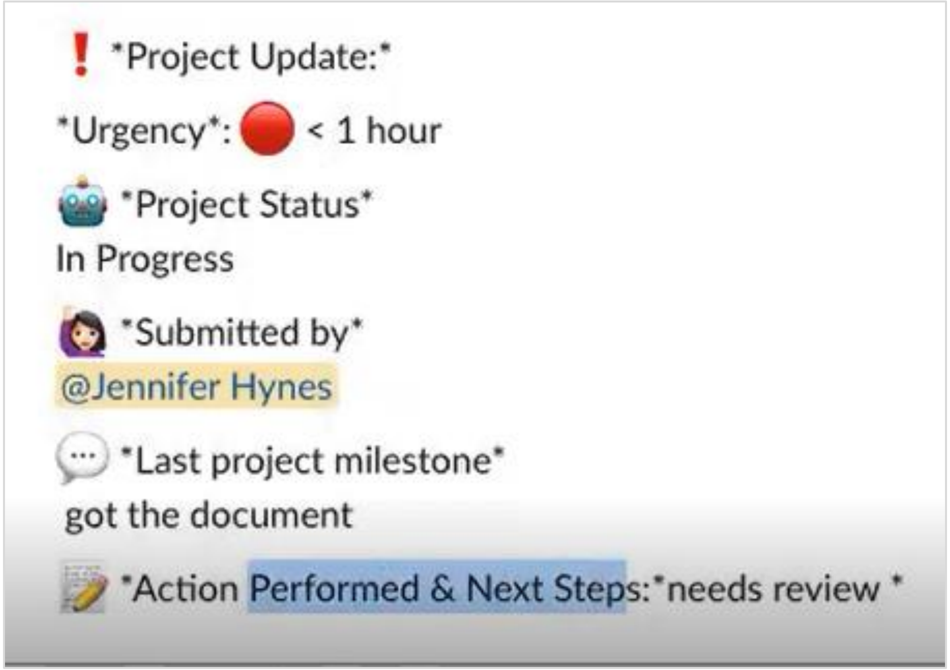
Note the variables you can include for tracking



Example of Project Status Workflow

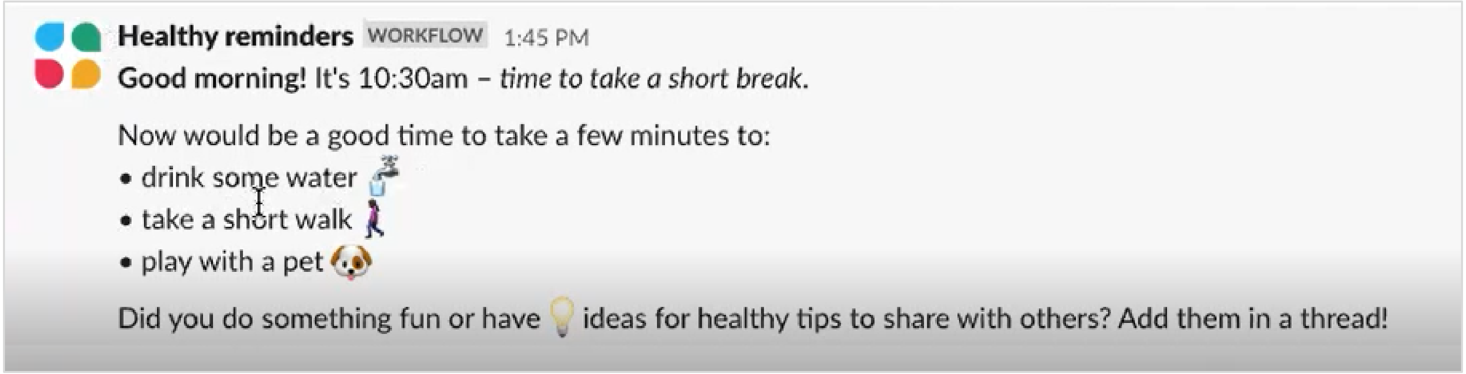


Example of Project Status Workflow



Each response seen in channel

Example of Healthy Reminder Workflow



This is a message posted daily in channel by the Workflow.

slack
It's a snap!

Workflow Glossary

Trigger	How your workflow will start. You can choose a **shortcuts menu** trigger to launch your workflow from the menu in a channel, or another trigger to start your workflow automatically when a certain action is taken.
Step	How people interact with your workflow. You can add steps that send messages, custom forms, or use steps from Slack apps to link your workflow to other tools.
Variable	Information submitted to your workflow that can be referenced in steps. More variables will be available to choose from as you add steps to your workflow.
Workflow Manager	A member of your workspace with permission to manage your workflow. Any manager can change or remove steps, manage other manager, and unpublish or delete a workflow.

Training Survey

Thanks for attending!

https://www.surveymonkey.com/r/96FJ7JK

We'd love for you to take a minute and fill it out so we can continue to improve.

REMINDER!
Do NOT Access QualityNet Resources from Outside the U.S.

Lately, there has been an increase in the number of users accessing QualityNet resources from outside the United States (U.S.). This is particularly evident for the Slack application. This notice is a reminder that contractual requirements and security policy prohibit this type of access.

When access from outside the U.S. is detected, the user's HARP roles will be removed (i.e., access will be disabled) until the investigation is complete and the user returns to the U.S.

It is recommended that you remove the Slack app from your phone if you are traveling abroad and reinstall it after you return to the U.S. If this is not feasible, you must log out of CCSQ Slack before you leave the U.S. and do not log in again until you return. Take these steps to ensure you are logged out from all devices:

1. From your desktop, navigate to your Account settings by following this link: https://my.slack.com/account.
2. Click Sign out all other sessions and follow the prompts.

Thank you for your attention and cooperation. If you have any questions, please reach out to your CMS Information System Security Officer (ISSO) or Contracting Officer's Representative (COR).