

How to Assign Record Types to a Workflow

TI version 10.7

APPLICABLE TO:

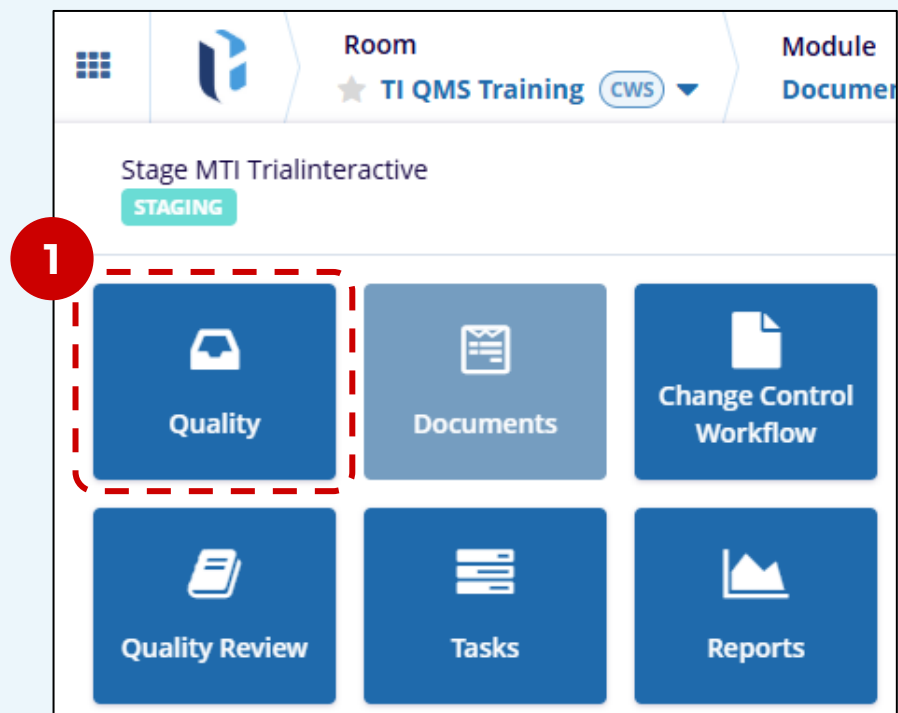
- SuperAdmin
- Admin
- Collaborate
- CCR

Internal Use Only– Do Not Distribute

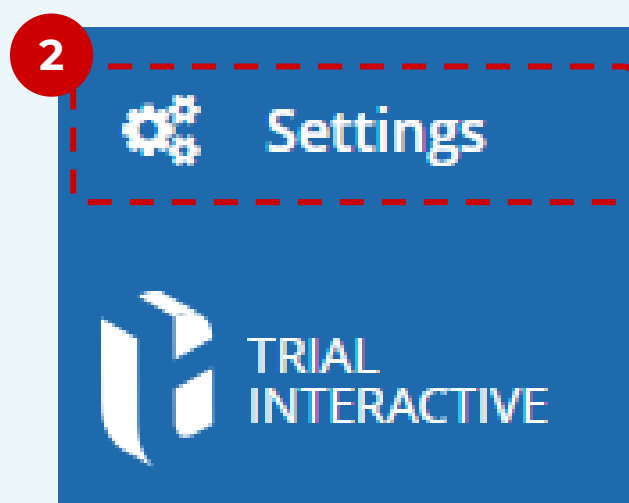


It is necessary to make sure that each QMS workflow has at least one Record type assigned, so that when a record is created, it matches the correct workflow. This Job Aid illustrates how to make the change on existing workflows.

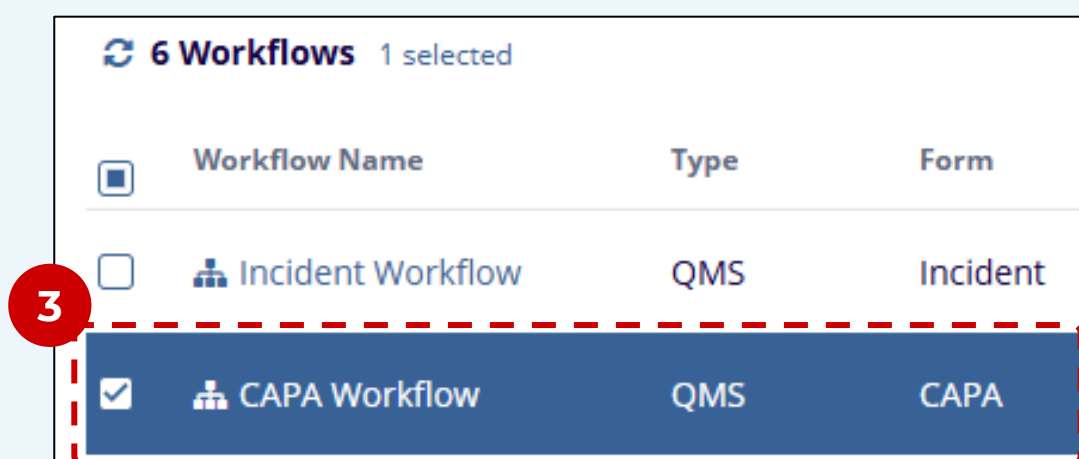
1 Enter a QMS-Enabled Collaborate room. Via the waffle or the module selector, navigate to the **Quality** module (actual name may vary).



2 Select **Settings** from the navigation sidebar.

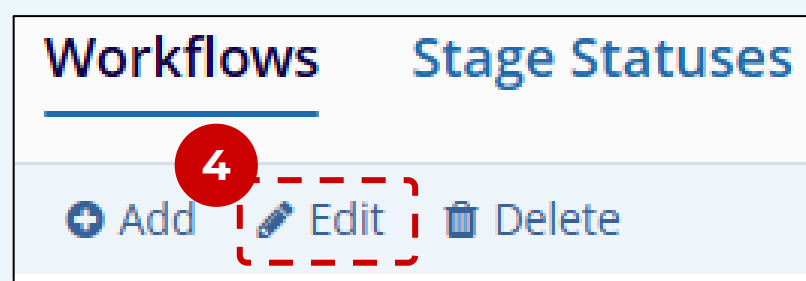


3 In the Workflow Management section, select the desired workflow

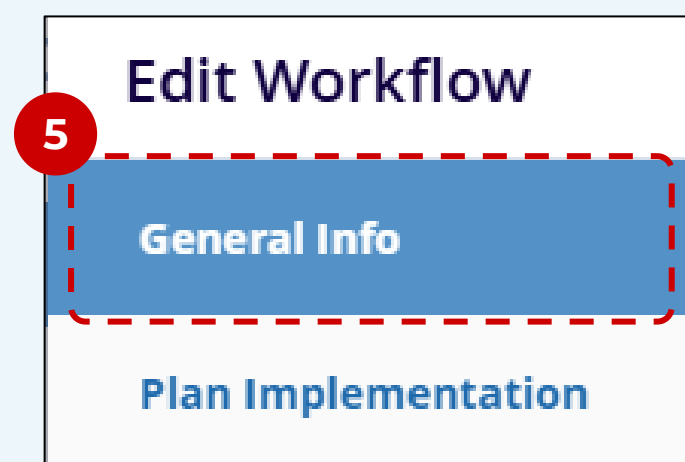


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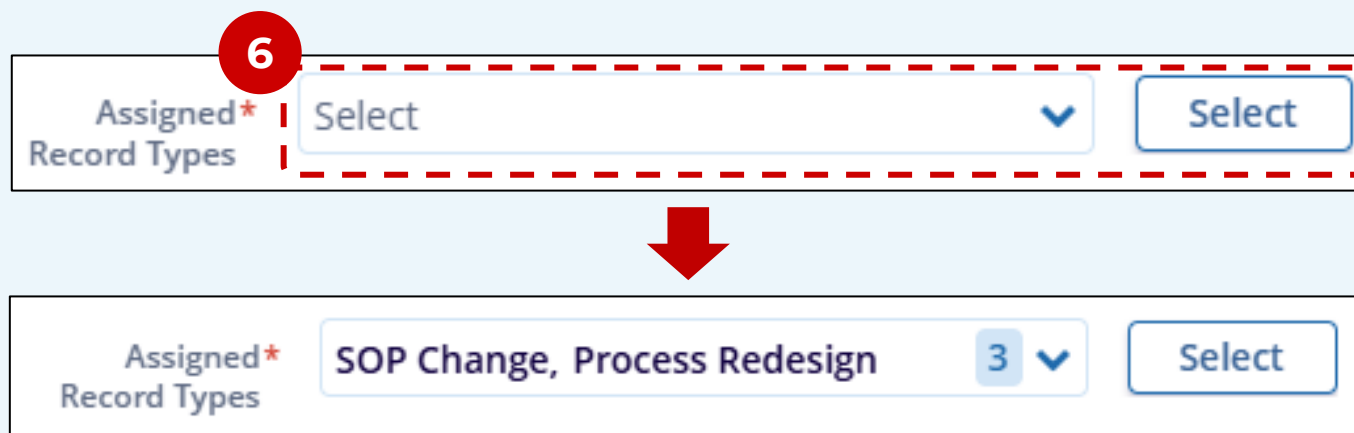
4 Click on Edit in the top bar.



5 Make sure you are seeing the first tab, **General Info**.



6 Click on the **Assigned Record Types** dropdown to type & search, or click on **Select** to choose from a tree layout.



7 After selecting the record types, make sure to **Save Changes**.

