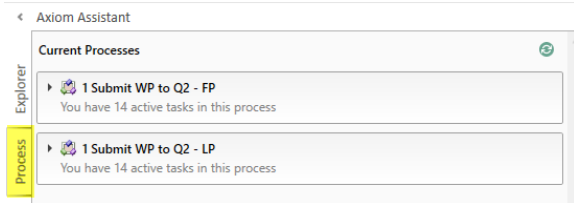


# YBT Process Management – Financial and Labor Plans

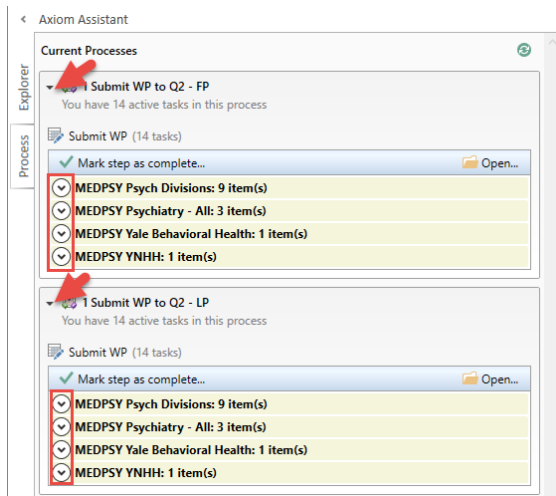
Workflow is now known as Process Management. It performs the same function as Workflow but looks and behaves a little differently.

## Navigating Process Management

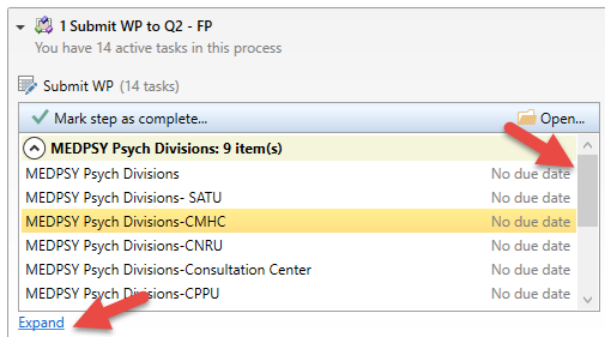
To access Process Management, click on the “Process” tab on the left side of the YBT screen.



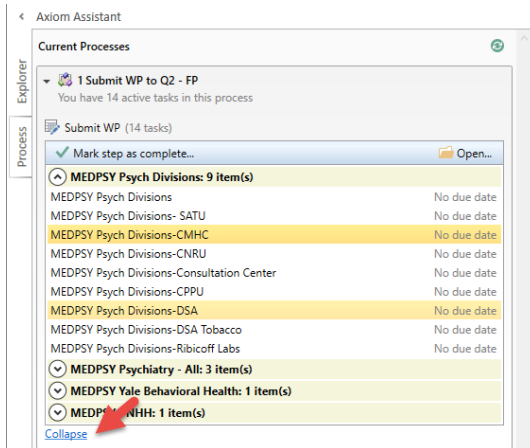
To view the files and plan file groupings in the Process windows, click on the arrows.



The Process window can be expanded by clicking on ‘Expand’ to allow Units with many plan files to see more in one pane. A scroll bar on the right side of the window is also available.

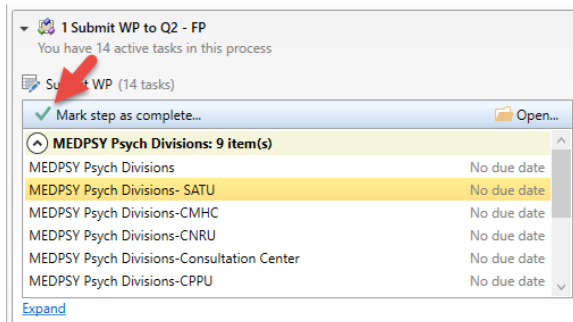


Use the 'Collapse' to make the pane smaller

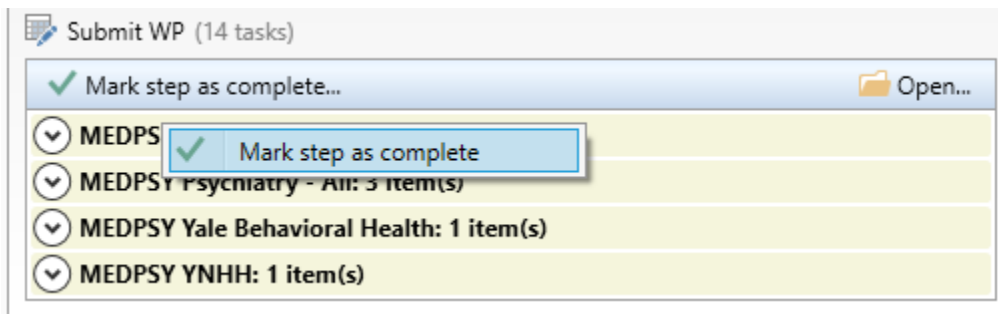


## Plan File Submission

To submit a plan file or a group of plan files, click on the file or a file within the grouping and then click on the 'Mark Step as complete...'



You can also right click on the file or group of files and select 'Mark Step as complete'



The Process Action window will open. In this window, you can either check individual plan files or you can choose 'Select All' plan files in that grouping for submission. (**NOTE:** the plan file that your cursor was on before clicking the Mark Step as Complete will automatically be selected. If you do not want to submit that plan file, uncheck the box next to it.)

Click OK when your selection is made.

Process Action

Mark process step as completed in process '1 Submit WP to Q2 - FP'.

**Current Step**  
Submit WP

**Next Step**  
Reviewer

Complete step for: (1 of 9 selected) [Select All](#) [Clear All](#)

- FPList FP\_CC1096 (MEDPSY Psych Divisions-CNRU)
- FPList FP\_CC1097 (MEDPSY Psych Divisions-Consultation Center)
- FPList FP\_CC1486 (MEDPSY Psych Divisions- SATU)
- FPList FP\_CC1487 (MEDPSY Psych Divisions-CMHC)
- FPList FP\_CC1622 (MEDPSY Psych Divisions-CPPU)

**Comment** Any comment will be stored with the process and included in notifications to the next ste...

1000 characters remaining

OK Cancel