Celoxis Workflow Guide

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Chapter 1. Overview of Administrator Guide

This guide provides information about using Celoxis Workflow Administrative tools. Topics such as Applications, Categories, Email Integration, Email templates etc. are covered in this guide. To access the Administrative tools click on Administration in the menu bar.

Chapter 2. Defining an Application

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2.1. What is it?

You group related processes together as an "Application". e.g SFA, Help Desk, Issue Tracking and so on.

The benefit of this is that Roles, Role -Privileges and custom information required in related processes can be combined together under an "Applications".

e.g roles like Sales Manager, Sales Coordinator and so on are specific to the SFA related processes while QA manager, Tester, Developer etc are specific to the Bug Tracking Applications.

2.2. Getting Started

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2.2.1. Getting Started: Thinking about Processes and Applications

Celoxis Workflow automates the processes in your organization. But for Workflow to be effective in your organization you will have to plan your Workflow execution. Given below is the list of "To Dos". It is recommended that you work these things out on paper before entering in to the Workflow.

1. Identify processes that you want automated. E.g. Order Tracking, Sales Tracking, Issue Tracking, Repair Tracking etc.

2. **Applications**

   Group together related processes identified in step (1). For example, Defect Tracking and Enhancement Tracking can be grouped together. The advantage of grouping is that roles and custom forms can be shared. Each group represents an "application".

3. **Custom Forms**

   For each application, list out the various forms and it's details that you want users to fill in the system. Later on, you will have to specify when these forms should be filled. If you use paper forms, this is a very good candidate for replacing it. Not only will you find all these forms in one place, they can also be searched using keywords.

   For example, in an "Order Fulfillment Process", attributes like "Order Number", "Order Details", "Billing Information", "Ship-to Address" can be captured when an order is being entered, while another form "Shipping Details" containing "Tracking Number", can be required to be filled by the shipping clerk, when he/she is done shipping.

4. **Roles**

   A business process consists of different activities performed by different people. A person doing a specific activity is playing a specific "role" in the process. For example, a "loan approver" approves the loan, while a "shipping clerk" ships the order. People "play" roles in a process.

   Privileges in the system are given to roles not users. This way management becomes much easier. All you have to do is assign/unassign a role to a user to grant/revoke privileges.

   For each application, list the appropriate "roles". For example, in a repair tracking process, you can have roles "Engineer" (who is responsible for estimating labor and material, and actually fixing it), "Customer Contact" (who is responsible for communicating with the customer) and "Shipper" (who is responsible for shipping the part back to the customer).

   Note that role is not necessarily a person's job title but a reflection of what duties he/she is performing in a business process

5. **Process Workflow**

   To enter your process in to the Celoxis Workflow System, you need to think of it as state and state transitions.

   States represent "Stages" in your business processes. Each state is a logical check point in the process where a specific activity is expected to be performed. For example, in an "Order Fulfillment Process", the following states may exist: "Order Received", "Payment Authorized", "Goods Shipped", "Payment Captured", "Closed". Other states might be "Payment Not Authorized", "Order Rejected" and "Order Canceled By Customer".

   State transitions represent "Possible Next Steps" from a particular state. Continuing the above example, from state "Order Received", depending on whether payment was successfully authorized, the next state could be "Payment Authorized" or "Payment Not Authorized". This will be represented by two transitions from state "Order Received". While defining state transitions in Celoxis, in addition to the next state, you can also specify the next assignee. A next assignee could be a role, the requestor, manager etc.

You can also categorize processes for ease of management (just like you do documents into folders). Read the categories section for more information.

2.3. Creating an Application

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2.3.1. To create an application

1. From the toolbar click Setup+Company
2. Under Workflow section, click on Manage Workflow Applications
3. Click Create application
4. Name your Applications, select Category and click Submit.

2.4. Importing Pre-defined applications

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2.4.1. What is it?

Celoxis Workflow comes with a few popular predefined application templates that you can import and use. They help you get started on the frequently needed processes and also serve as a guide for defining your own processes.

2.4.2. Importing predefined applications

1. From the toolbar click Setup+Company
2. Under Workflow section, click on Manage Workflow Applications
3. Click Import Application
4. Select the applications you want to import
5. Click Submit

2.5. Custom Forms

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2.5.1. What is it?

You can capture business process specific information using custom forms.

For example, in the "Order Fulfillment Process", attributes like "Order Number", "Order Details", "Billing Information", "Ship-to Address" can be captured. A Lead Tracking process may need information like "Lead Name", "Referred By", "Time to make decision" , "Budget", etc.

A more powerful feature is the ability to capture custom data at each state transition not just at the first step. E.g. when moving a sales lead from "Waiting for Customer" to "Lost" you might want the sales representative to enter a "reason" on why they lost the lead while in a defect tracking process you may want the developer to attach a "test plan" when fixing a bug.

2.5.2. Adding Custom forms

1. From the toolbar click Setup+Company
2. Under Workflow section, click on Manage Workflow Applications
3. Select the application for which you want to define and click Custom Forms.
4. Click New custom form
5. Add Custom fields and click Close & Refresh Main Window.

Defining custom forms is not enough, the system must be told when they are to be filled

2.5.3. Attaching Custom forms to a process

To attach custom form to a process (the user initiating a process will be asked to fill these forms)

1. From the toolbar click Setup+Company
2. Under Workflow section, click on Manage Workflow Applications
3. Select an application and click Process Type
4. Click Edit.
5. Select the custom form to be associated with the process.
6. Click Submit

2.5.4. Attaching Custom forms to a state transition

To attach custom form to a state transition (user doing the state transition will be asked to fill these forms)

1. From the toolbar click Setup+Company
2. Under Workflow section, click on Manage Workflow Applications
3. **Note:**Make sure that the custom form is attached to the process.
4. Select the process and click Workflow
5. Go to Edit state transition→Fill Forms select the forms that you want associated with the state transition.
6. Click Save

2.6. Security

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2.6.1. Roles

2.6.1.1. What is it?

For each application you define roles applicable to that application and specify the privileges for each role. Who plays what role is specified on a category. In the "Lead Tracking" process the roles may be "Sales Manager", "Sales Coordinator" and so on. The Sales Manager will have edit privileges on all lead tracking processes. However under the category USA->Sales, John Doe may be the Sales Manager while in Europe->Sales, Mary Jane might be the Sales Manager.

Note: Read the Getting Started: Thinking about Processes and Applications (Section 2.2.1)[3] section to understand what roles are and where they are used

2.6.1.2. Adding Roles

By default there is a role called "Anyone". All logged in users from your organization play this role. You can add more roles by doing:

1. From the toolbar click Setup+Company
2. Under Workflow section, click on Manage Workflow Applications
3. Select the application for which you want to assign roles and Click Roles
4. Add Role. Give the Role the appropriate permissions and click Submit.

Just defining roles is not enough, they must be assigned to users. In Celoxis, roles are assigned to users in a **category**. This way, a user can play a role in one category and not play that in a different category.

For example, John may be playing the "Sales Manager" role in category "Global > Sales > US" while Mary may be the sales manager for Europe, so she will be assigned that role in category "Global > Sales > Europe".

2.6.2. Role Inheritance

2.6.2.1. What is it?

Assigning roles to users in every category may become cumbersome and unmanageable. The concept of role inheritance solves this problem. Put simply: if a user plays a role in a category, then the user automatically plays the same role in all it's sub categories.

Continuing from the previous example, if Mark is the worldwide sales director, then if he is assigned that role in category "Global > Sales", then he automatically plays that role in categories "Global > Sales > US" and "Global > Sales > Europe" as well. There is no need to assign him to that role in the sub-categories.

2.6.2.2. Assigning Roles to Users

1. From the toolbar click Setup+Company

2. Under Workflow section, click on Manage Workflow Access Control
3. Select the application and then select Category.
4. Click  to add users.
5. Click Submit

2.7. States

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2.7.1. What is it?

Read Getting Started: Thinking about Processes and Applications (Section 2.2.1) [3] section.

2.7.2. Adding/Editing States

1. From the toolbar click Setup+Company
2. Under Workflow section, click on Manage Workflow Applications
3. Select an application. Click Process Type
4. Select Process. Click Workflow
5. Click on Add State or Edit State.

2.7.3. Display Order

2.7.3.1. What is it?

It may be required that states appear in a certain order in the user interfaces. For example, "Open" must appear before "Closed". This field can be used to order your states.

2.7.3.2. Changing the Display Order

1. From the toolbar click Setup+Company
2. Under Workflow section, click on Manage Workflow Applications
3. Select an application
4. Select a process type. Click Workflow
5. Click Edit State, and under the Display Order field enter the orders in which the States should appear.

2.7.4. Start State

2.7.4.1. What is it?

When a process is initiated it needs to be in some state. This is the start state. If there is only one start state then the process will always be created with that state. However, in case there are multiple start states the user creating the process is prompted to pick one of them.

For example, in a bug tracking request a valid start state is "Reported", while in case of an issue it could be "Unresolved".

2.7.4.2. Changing the Start State

1. From the toolbar click Setup+Company
2. Under Workflow section, click on Manage Workflow Applications
3. Select an application
4. Select a process type. Click Workflow
5. Click Edit State, and under the Start State field select the Start State.

2.7.5. End State

2.7.5.1. What is it?

This state indicates a logical end of the process. Processes in this state are treated as completed.

For example, in a bug tracking request a valid end state is "Closed" which in case of an issue it could be "Resolved".

2.7.5.2. Changing the End State

1. From the toolbar click Setup+Company
2. Under Workflow section, click on Manage Workflow Applications
3. Select an application
4. Select a process type. Click Workflow
5. Click Edit State, and under the Start State field select the End State.

2.7.6. Delete State

2.7.6.1. What is it?

Deleting a state deletes the state and all the transitions to and from this state.

2.7.6.2. Deleting States

1. From the toolbar click Setup+Company
2. Under Workflow section, click on Manage Workflow Applications
3. Select an application

4. Select a process type. Click Workflow

5. Click Edit State, and under the Delete field select the state to be deleted.

6. Click Save

2.8. State Transitions

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Note: Read Getting Started: Thinking about Processes and Applications (Section 2.2.1) [3] section first.

2.8.1. What is it?

Transitions are rules that define how a process transitions (moves) from one state to another. There may be many possible transitions from a state. e.g a bug in the state "Fixed" can be transitioned to "Re-open" because the bug fails a test or it may go to "Closed" because the fix worked.

2.8.2. Adding/Editing State Transitions

1. From the toolbar click Setup+Company

2. Under Workflow section, click on Manage Workflow Applications

3. Select an application

4. Select a process type. Click Workflow

5. To Add Transitions click Add State Transitions, to edit Transitions click Edit State Transitions.

Here you will be presented with the following options;

2.8.2.1. State

The name of the state **from** which this transition will happen.

2.8.2.2. Action Name

The name of the transition. E.g. from moving a process to state "Open" from "Closed", you can name it "Reopen". If you can't think of anything, just name this "Move to <next state>", e.g. "Move to Waiting".

2.8.2.3. Next State

The state to which the process will be routed. For this option you may select one of the following;

1. Same State: This options keeps the same state after the transition. For example, if a process will be re-assigned to another assignee, but stay in the same state, this option can be used. Another example where this options can be used is if an assignee simply needs to update a problem record without changing the state.

2. Previous State: This option will send the process to the most recent state prior to the current state.

3. Specific states defined : This option allows the user to choose from a list of all states as the new state for the process.

2.8.2.4. Next Assignee

The user to whom the process will be routed when this transition is selected. For this option, you may select one of the following choices listed below.

1. Same as current owner: This option can be used for transitions where a problem record does not need to be assigned to a different user. For example, if a process simply needs to be updated by the assignee.

2. Unassigned: This option indicates that there is no owner in the next state. For example, in a help desk process a new support request may be left unassigned as they are picked up by representatives.

3. State Manager: This indicates that the next owner is the State Manager of the next state.

4. Last Assigned for this State: Assign to user who was owner of the previous state. Useful when you want the same person who handled it before to work on it again.

5. Prompt in Role: The user doing the transition will be prompted with a list of users playing this role for that process.

2.8.2.5. Allow User?

Allows the user to perform the next transition. It may be required that some transitions be performed only by the system through timeouts.

2.8.2.6. Fill Forms

Here you select the custom forms that the user will be required to fill when the transition takes place.

2.9. Timeout Policies

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2.9.1. What is it?

Timeout Policy determines what the process should do after a certain time has elapsed in a state. e.g. In a bug tracking system, if the bug remains in state "new" for 24 hours then it may be required to notify the manager. Similarly in a help-desk system, it may be organization policy to move requests to state "Closed" after 3 days of inactivity.

2.9.2. Add New Timeout Policy

1. From the toolbar click Setup+Company

2. Under Workflow section, click on Manage Workflow Applications

3. Select an application

4. Select a process type.

5. Click Timeout Policy,

6. Click New Timeout Policy,

Here you are presented with the following options;

2.9.2.1. Name

Enter the Timeout Policy's name. E.g. in support systems it is typical to have names like "Gold", "Silver" and "Bronze".

2.9.2.2. Time Out(Hours)

This option allows you to specify the number of hours to wait before timeout. For a state you can specify timeout for the following categories;

1. High Priority
2. Normal Priority
3. Low Priority

e.g. In bug tracking you can specify timeout for High Priority bug as 24 hours, for normal priority bugs as 48 hours and for low priority bugs as 72 hours. Here you can also specify whether you want the user to be notified before timeout.

2.9.2.3. Ask User

The user is asked for the date of timeout. This is for cases where the timeout cannot be determined upfront. E.g. in the sales lead tracking application, the time out in state "waiting for prospect's response" could be dependent on the prospect - - maybe the prospect calls and asks the sales guy to contact him on a particular date.

2.9.2.4. Action

This allows you to specify the next transition state after timeout. Here you are presented with the following options.

2.9.2.5. Transition after time out [select transition]

Select the transition after timeout.

2.9.2.6. Mark as delayed

This marks the state as delayed. After a time out and if this option is set, the process is marked as "delayed" and the state manager is notified. **Note:**To receive timeout notifications the state has to be marked as delayed.

2.9.2.7. My Timeout policy is not working

Check the following:

1. Have you selected the Mark as Delayed option for the state transitions?
2. Have you turned on notifications ?
3. Are you assigned to the process or are you the State Manager?

Chapter 3. Configuring Application in a Category

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You can configure your Applications for a particular category with Celoxis Workflow.

3.1. State Managers

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3.1.1. What is it?

For each Category in an Application you can have a State Manager who is assigned responsibility for a state. The State Manager will be a user who will receive email notifications when a state changes or timeout occurs

3.1.2. Adding State Managers

1. From the toolbar click Setup→Company
2. Under Workflow section, click on Manage Workflow State Managers
3. Select your Application
4. Select Category
5. Select the State Manager for the states from the drop down list. If you do not specify the State manager the State Manager from the parent category will be used.
6. Click Submit

3.1.3. Removing State Managers

1. From the toolbar click Setup→Company
2. Under Workflow section, click on Manage Workflow State Managers
3. Select your Application

4. Select Category

5. From the State Manager drop down list select Select.... option to remove State Manager. To change the State Manager select another user.

6. Click Submit

3.2. Assign Roles to Users

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3.2.1. What is it?

Roles are used to control security. In the "Lead Tracking" process the roles may be "Sales Manager", "Sales Co-ordinator" and so on. Roles are assigned privileges (who can do what) at the "Application" level.

3.2.2. Assigning roles to user

1. From the toolbar click Setup→Company

2. Under Workflow section, click on Manage Workflow Access Control

3. Select an application

4. Select Category

5. Click  to add users.

6. If no user is selected for the Category then the users from the parent category will be selected

Chapter 4. Categories

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4.1. What is it?

Categories offer a way to group processes together.

e.g. You can define categories based on geography.

e.g. If you have a Sales office in USA and Europe with support in Asia and engineering in the USA, you could categorize as

North America
 Sales

 Engineering

Europe
 Sales

Asia
 Help Desk

OR

Sales
 USA

 Europe

Help Desk
 Asia

Engineering
 USA

OR any other way.

Categories provide the following benefits:

1. Organize processes, just like how folders help in organizing documents.

2. You can control the categories in which certain processes appear. For example, you may not want defects in a category "Sales" nor you may want sales leads in category "Bugs".

3. **A security context.** Roles are assigned to users in a category. Read more in the *Defining an Application* (Chapter 2) [2] section of this manual. In the description above you could have 2 different sales teams in USA and Europe. In the category Europe -> Sales and USA -> Sales you define who plays the roles of Sales Manager and Sales Co-ordinator.

4.2. Adding Category

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1. From the toolbar click Setup+Company
2. Under Workflow section, click on Manage Workflow Categories
3. Click Add Category

Here you have to specify the following options;

4.2.1. Name

Name of the Category.

4.2.2. Description

Description of the Category.

4.2.3. Category to be contained in

This specifies the category that the new category will be contained in i.e you specify the parent category.

4.2.4. Select Applications that can be entered in this Category

You select the applications to be contained in this Category.

4.3. Editing Categories

1. From the toolbar click Setup+Company
2. Under Workflow section, click on Manage Workflow Categories
3. Select a category and from the action dropdown click Edit

4.4. Delete Categories

1. From the toolbar click Setup+Company
2. Under Workflow section, click on Manage Workflow Categories
3. Select a category and from the action dropdown click Delete

Chapter 5. Email Integration

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5.1. What is it?

You can start a Workflow process by sending an email.

e.g. An email from the prospect can start the Sales Tracking process

There are two methods you can use to integrate email with Workflow;

5.2. Direct Email Interface

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5.2.1. What is it?

When you want to start a specific process in a particular category and state this method is used.

e.g. A New Help Desk process is started when in the Global category when the customer sends an email to a particular address.

5.2.2. Using Direct Email Interface

1. From the toolbar click Setup→Company
2. Under Workflow section, Click Setup Email Integration
3. Under the Direct Email Interface section click start here
4. Select the Application and click Next
5. Choose the Category and State and click Submit
6. The email address for that particular Category and State is shown. Use this to start the Workflow in a particular Category and State. Click Send Test Mail to test this email address.

5.3. Indirect Email Interface

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5.3.1. What is it?

This method is preferred when you want to integrate your existing system into the Workflow process. The emails will be automatically generated by programs.

e.g. If your organization has 100 products and each Product has a separate Sales Department then you can configure to send email to the specific Sales Department for the product that the Customer chooses.

5.3.2. Using Indirect Email Interface

For this to happen you will have to configure your form processing script to send mail to the relevant address. See Using Direct Email Interface (Section 5.2.2) [16] to find out the relevant address.

Chapter 6. Email templates for emails to requestor

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6.1. What is it?

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You can tweak the kind of emails that are sent to the requestor. e.g. For all the American categories you would like the email to be sent in a particular format while for your European categories you would like it to be sent in another format.

You have a set of predefined macros that you can use in the templates.

6.1.1. Configuring Email Templates

1. From the toolbar click Setup+Company
2. Under Workflow section, click on Manage request email notification templates
3. Select the Category and click Next
4. Use the predefined Macros in the email field.
5. e.g If you want the Company Name to appear in the Sender name field put the macro "$cn" in the Sender name field.
6. Click Submit.

Chapter 7. User Guide

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The user guide is intended for regular users of the system and describes the operations that the normal user will need to perform regularly.

To get started with Celoxis Workflow goto the Workflow page. Here you will see the following;

7.1. New process

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7.1.1. What is it?

You can add a new process here.

7.1.2. Starting a New Process

1. From the toolbar click Workflow→Start Process

2. Select a Process and click Next.

7.2. My Processes

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7.2.1. Assigned to me

7.2.1.1. What is it?

These are the processes where you are the owner for the current state. If timeout policy is applied on the process, the system will indicate the time in which you are expected to complete the current activity. Note that the "Due Date" field indicates when the entire process is to be completed. If you do not complete the activity on time, and if timeout policy is defined, the manager for the current state is notified and the process is marked "Delayed".

7.2.2. Requested by me

7.2.2.1. What is it?

These are the processes where you are the requestor. From here you can monitor the progress of the processes. You may initiate processes on behalf of others by putting in their name in the "Requestor" field. Then the process is displayed in their list and you will be shown as the "Creator".

7.2.3. My Reports

7.2.3.1. What is it?

You can indicate some reports to be directly executed and output be shown on this page. To enable this click on "Reports" link in the top bar and follow the instructions.

7.3. Working on processes

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7.3.1. Initiating a process

Read Starting a New Process (Section 7.1.2) [19].

7.3.2. Goto your process/Find your process

To goto your process or to find your process;

1. From the toolbar click Workflow+Start Process

2. Select your process
3. **OR**
4. From the toolbar click Workflow→Category
5. Select the category in which your process is and then select the process
6. **OR**
7. From the toolbar click Workflow→Category
8. Select the category and search for the Process.

7.3.3. Indicating "I am done"/ Marking Step complete.

When you have finished your activity you must indicate that you are done so that the system can move the process to the next state and show it to the owner for that state.

1. Goto your process.
2. Select the next state that you want to move to from the drop down list. Click Go.

7.3.4. Adding Comments

As you make progress in completing your task you can add comments to the process. You can even attach documents. This way the manager knows how things are progressing.

To add comments;

1. Select a process
2. Select Add Comment from the drop down list. Click Go

7.3.5. Notifying the Requestor

Either while indicating "I am done" or while adding a comment, you can send the comments that you enter to the requestor. To do this enter comments and click on "Notify Requestor" checkbox before submitting the form.

7.3.6. Re-assigning

You can re-assign processes currently assigned to you. This may be done for a variety of reasons including work restructuring, you are going on leave or are busy with other activities. To reassign;

1. Select a process.
2. Select Reassign from the drop down list. Click Go.
3. Select a user and click Submit

7.4. Customizations

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7.4.1. What is it?

You can customize email notifications that you receive and the output columns of Applications on MyProcesses page.

7.4.2. Customizing Output columns

Select the columns that are of interest to you.

1. From the toolbar click Setup→Personal
2. Under workflow modules setup click Customize Columns.
3. Select or Deselect the columns for the applications. Click Submit

7.4.3. Customizing Email Notifications

The system sends out alerts/notifications for a variety of reasons. You can indicate when you would like to receive notifications. Todo this;

1. From the toolbar click Setup+Personal
2. Under general section click Configure Email Notification.
3. Select or Unselect notifications for Workflow section and Submit.

7.5. Reports

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7.5.1. What is it?

Celoxis workflow offers a report designer where you can

1. Specify sophisticated input criteria
2. Choose the output columns
3. Save the report for use later.

In addition you can indicate that the report should be run and displayed on the "My Processes" page.

7.5.2. Creating a new Report.

1. From the tool bar click Workflow→Reports
2. Click All Reports
3. Click Design New Report.

4. Select Process Type and click Next.

5. Give the title to the report in the Title box.

6. You can specify filters for your reports under in the Criteria fields. e.g If you want to design a report which shows all High Priority processes which have been Delayed then under the Criteria for Delayed select Yes and for Priority select High.

7. Select the output columns that the reports should contain, by selecting the option under output columns.

8. If you want the Report to be visible to everyone then select the Visible to Public option.

9. To run the report click Run or to Save the report click Save as new.

7.5.3. Editing Report.

1. From the tool bar click Workflow→Reports

2. Click All Reports

3. Click Design under the Action heading.

4. Select Process Type and click Next.

5. Make the necessary changes and click Save

7.5.4. Showing Reports on MyProcesses page/MyReports page.

1. From the tool bar click Workflow→Reports

2. Click All Reports

3. Select Show On My Reports for the reports that you want to see on the My Reports page.

4. Select Show On My Processes page for the reports that you want to see on the MyProcesses page.

5. Click Save

7.6. Browsing categories

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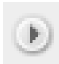
7.6.1. What is it?

In some cases, you may wish to see processes in a specific category, especially if they don't appear on "My Processes" page. You can navigate to the specific category and will be shown all processes that you have privileges to view. You can even search for processes in a particular category.

7.6.2. Browsing Category.

1. From the tool bar click Workflow→Categories

2. Click on the Category you want to view.
3. Click Design under the Action heading.
4. Select Process Type and click 
5. Make the necessary changes and click Save