Chapter 1. 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;

1.1. New process

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1.1.1. What is it?

You can add a new process here.

1.1.2. Starting a New Process

1. From the toolbar click Workflow→Start Process

2. Select a Process and click Next.

1.2. My Processes

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1.2.1. Assigned to me

1.2.1.1. 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".

1.2.2. Requested by me

1.2.2.1. 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".

1.2.3. My Reports

1.2.3.1. 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.

1.3. Working on processes

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1.3.1. Initiating a process

Read Starting a New Process (Section 1.1.2) [1].

1.3.2. 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.

1.3.3. 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.

1.3.4. 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

1.3.5. 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.

1.3.6. 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

1.4. Customizations

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1.4.1. What is it?

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

1.4.2. 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

1.4.3. 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.

1.5. Reports

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1.5.1. 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.

1.5.2. 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.

1.5.3. 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

1.5.4. 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

1.6. Browsing categories

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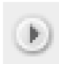
1.6.1. What is it?

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.

1.6.2. 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