

How to Create Workflow (For System Administrators) Quick Guide

How to Create Workflow (for System Administrators)

What is Workflow?

How to create Workflow?

How can I set Workflow rules?

How to add and edit field values?

What is Workflow?

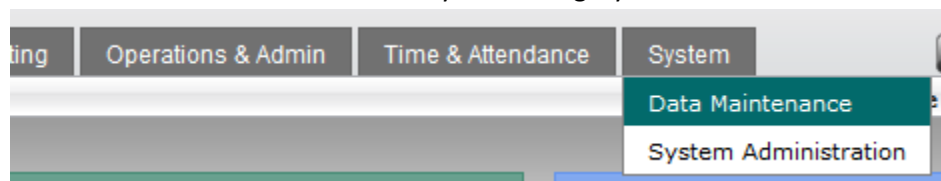
This feature allows you to create workflows for a particular field, and optionally defining rules for those workflows. Workflows can be defined through Data Maintenance by the system administrator for the following modules and fields:

- Bug Tracker – Report Status
- Product Change Tracking – Stage
- Product Development Tracking – Stage
- Production Tracking – Report Status
- Technical Support Center – Report Status
- New Ideas – Progress

How to create Workflow?

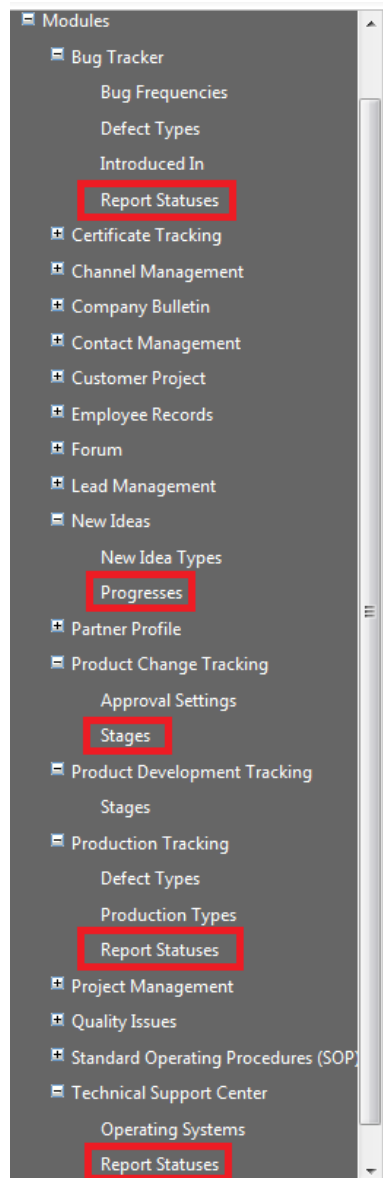
You create multiple workflows through data maintenance of the module fields mentioned above.

1. Go to the Data Maintenance Module under System Category.

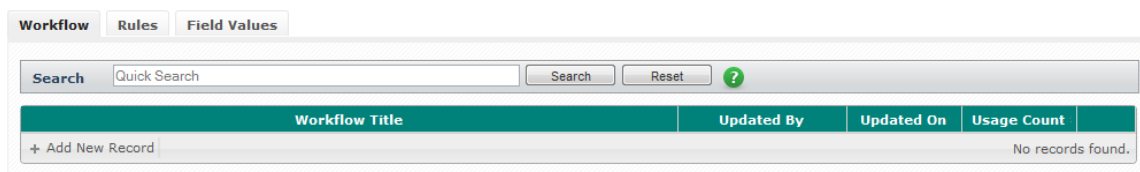


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2. Locate the field you would like to have workflow from the left side navigation tree.

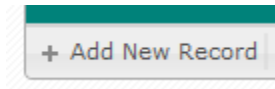


3. Open the page by clicking the Field e.g. New Ideas – Progresses. You will be directed to the Workflow tab's summary table.

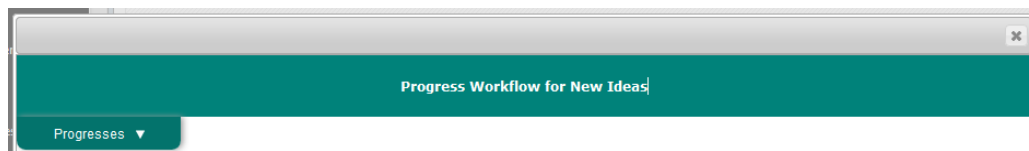
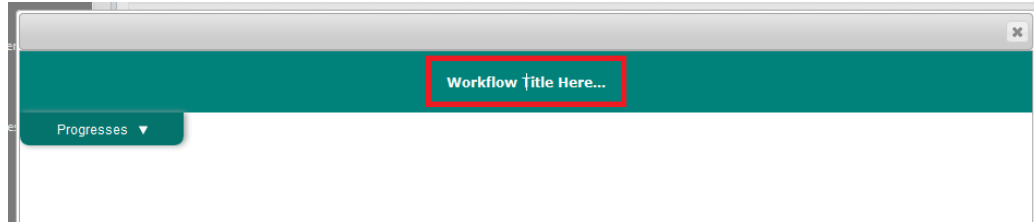


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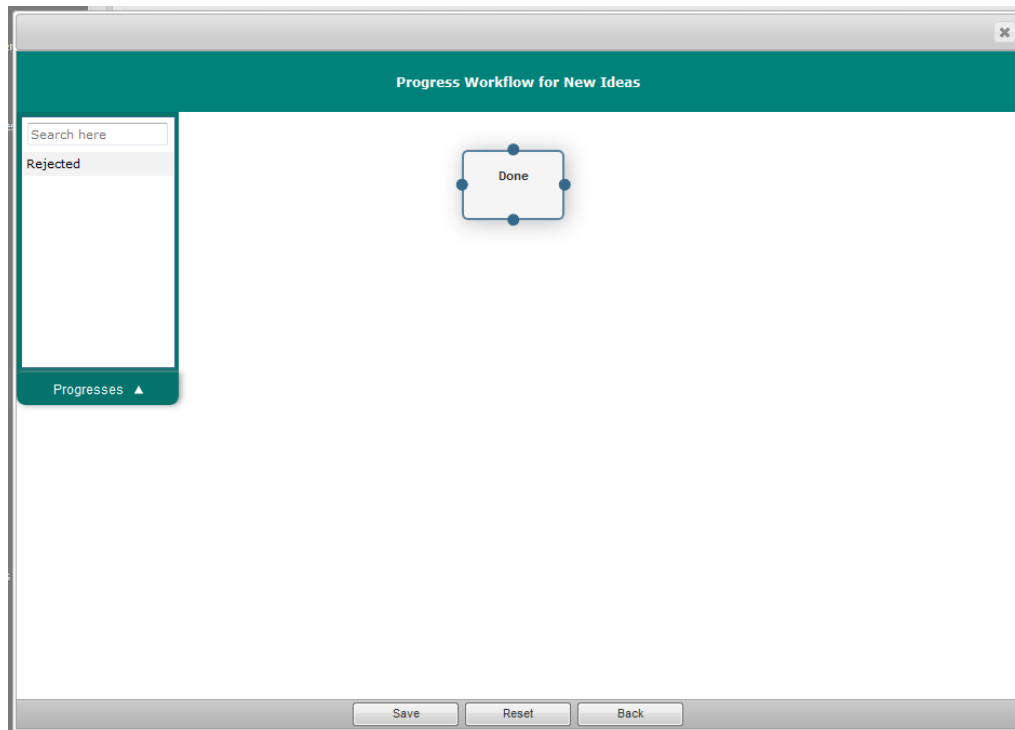
4. Click the “Add New Record” button from the summary table’s left bottom part.



5. Type or enter the title of your workflow in the title bar.

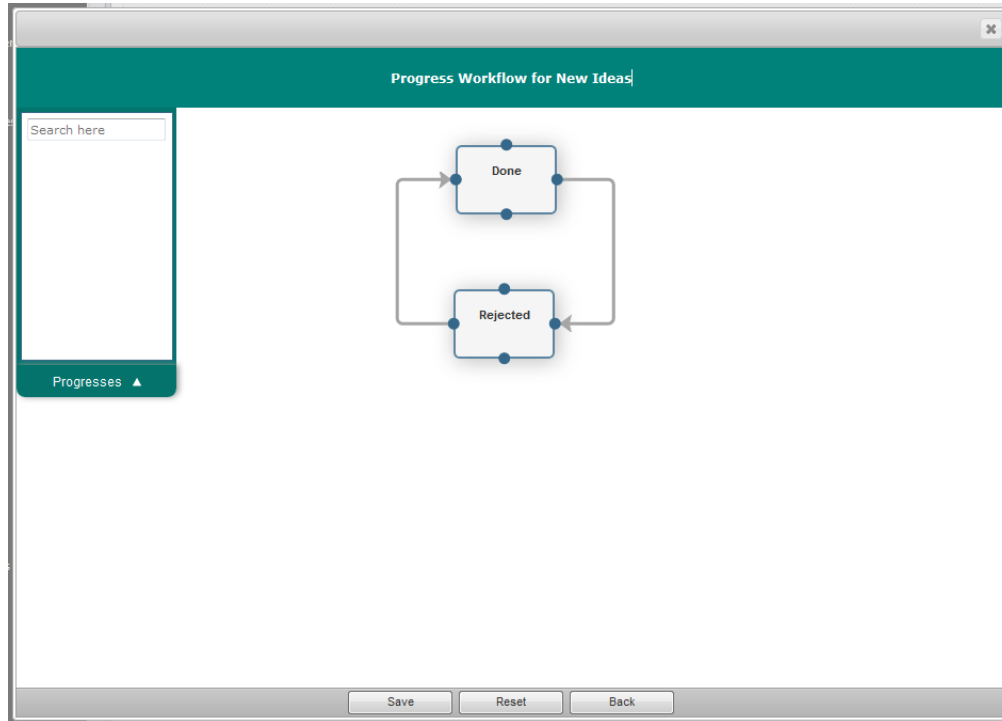


6. Drag and drop Progress values using the left-side extruder menu to the workflow space.

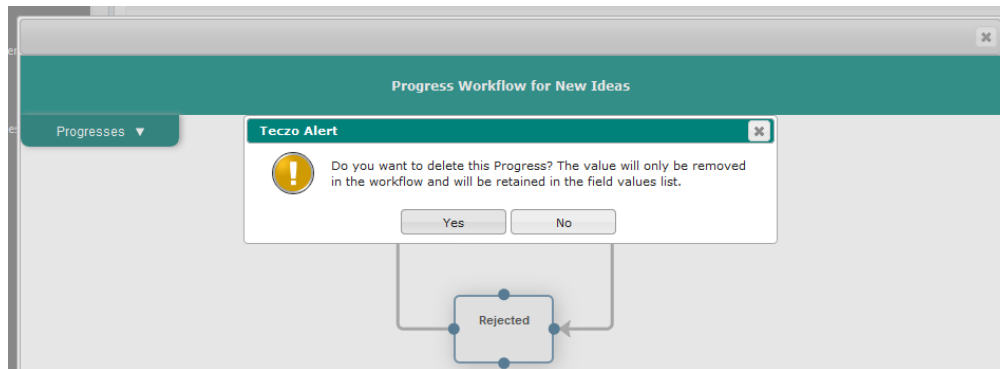


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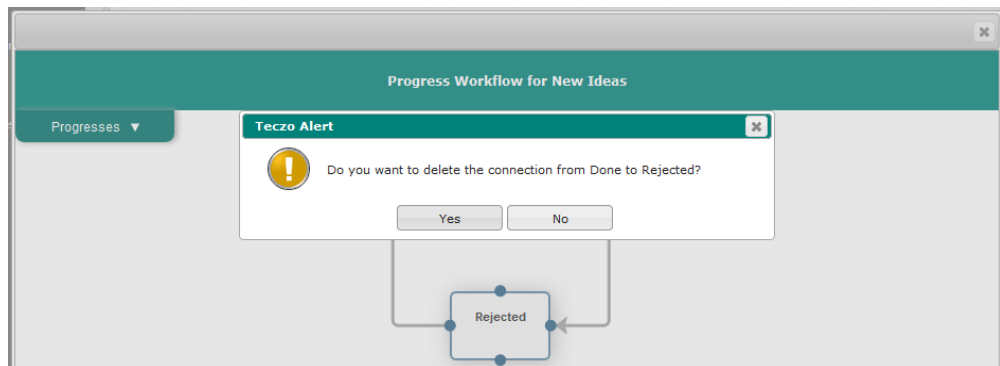
7. Connect the nodes by clicking from point to point.



8. You can remove the nodes by double clicking a node and confirming the action.



9. You can remove the connection by clicking the connector and confirming the action.



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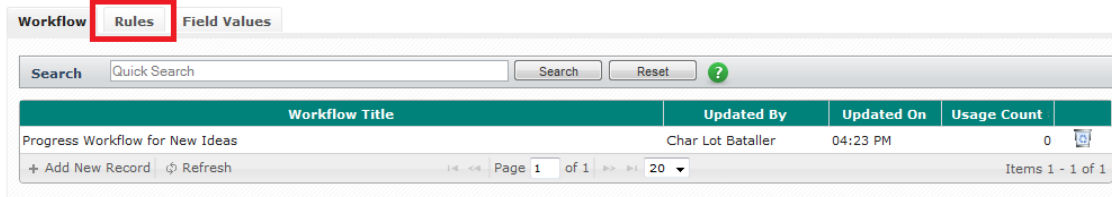
10. Click “Save” to save the workflow, “Reset” to return the last saved design and “Back” to return to the summary page with the last saved state.



How can I set Workflow rules?

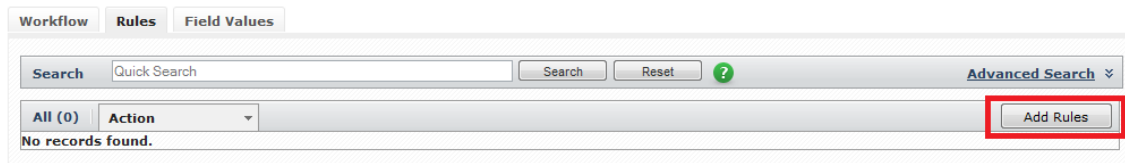
You can set rules for a specific workflow through the Data Maintenance module.

1. Follow steps 1 to 3 in [How to create Workflow](#).
2. Click the Rules tab from the field Workflow page.



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3. Click “Add Rules” button from the Rules tab’s summary table.



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4. Select workflow from the list.

The screenshot shows the 'Add Rules' form with the 'Workflow' dropdown menu open. The menu lists 'Progress Workflow' and 'Progress Workflow for New Ic'. The 'Value' field is set to '<Select>' and the 'To' field is also set to '<Select>'. The 'Restrictions' section is empty. The 'Approvers' section has a button 'Assign Approvers' and the text 'No approvers selected.'. The 'Needs Attachment' checkbox is unchecked. The 'Fields Dependencies' section has a dropdown set to '<Select>' and a '+ Add New' button. At the bottom, there are buttons for 'Save & New', 'Save & Close', and 'Back'.

5. Select the "From" and "To" values where you want to set rules, you can select multiple values.

The screenshot shows the 'Add Rules' form with the 'Workflow' dropdown set to 'Progress Workflow'. The 'Value' dropdown is set to 'Done' and the 'To' dropdown is set to 'Please select fields'. The 'Restrictions' section has a button 'Assign Approvers' and the text 'No approvers selected.'. The 'Approvers' section has a button 'Assign Approvers' and the text 'No approvers selected.'. The 'Needs Attachment' checkbox is unchecked. The 'Fields Dependencies' section has a dropdown set to '<Select>' and a '+ Add New' button. At the bottom, there are buttons for 'Save & New', 'Save & Close', and 'Back'.

Note: "From" are the source values in the selected Workflow. "To" are the values where the "From" value is connected to in the selected Workflow.

6. Set restrictions or rules for the selected connections in the workflow.

- a. Assign Approvers

You can set approval rules for the selected workflow connection. Approval Status will be shown in the respective modules once the user selects the "From" value in the topic.

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Following the workflow, the user will not be able to change the field value if the approver rule is set and the conditions are not met.

- Click the “Assign Approvers” button to open the approvers selection.

Add Rules

Workflow: Progress Workflow for New

Value: Done To: Rejected

Restrictions

Assign Approvers And Or

No approvers selected.

Approvers

Needs Attachment

Fields Dependencies: <Select> disable

+ Add New

Save & New Save & Close Back

- Click the name to select the approver from the left side table. You can use type and search functionality to search the list. You can also remove the approver by clicking the name from the right side table.

Select Approver

ba

Name	Office
Aron Bataller	MP3thumb USA
Aron Clark Bataller	Tectonic HongKong
Char Lot Bataller	Tectonic Manila
Charleane Bibal	Tectonic Manila
Lot Bibal	Tectonic HongKong
Michael Banting	Tectonic Manila
Michael Jesus Banting	MP3thumb USA
Mike Banting	Tectonic USA

Name	Office
Aron Bataller	Tectonic HongKong

Save Cancel

Note: Only users with access to the module are listed.

- Click Save to save the approvers. Cancel to close the modal page without saving.
- You can set hierarchy of the approvers by dragging the names up and down. You can also remove the approvers by clicking the X button.

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Add Rules	
Workflow	Progress Workflow for New
Value	Done To Rejected
Restrictions	
Assign Approvers	<input checked="" type="radio"/> And <input type="radio"/> Or
Approvers	<ul style="list-style-type: none">Arón BatallerAiz JaviertoAnne Marie Bermejo
Needs Attachment	<input type="checkbox"/>
Fields Dependencies	<Select> <input type="checkbox"/> disable + Add New
Save & New Save & Close Back	

- Select the logical condition for the approvers by clicking the radio button. By default, AND is selected.
 - AND – all approvers should approve first before a user can change the field value in the topic or item.
 - OR – any of the approvers should approve before a user can change the field value in the topic or item.

Value	Done To Rejected
Restrictions	
Assign Approvers	<input checked="" type="radio"/> And <input type="radio"/> Or
Approvers	<ul style="list-style-type: none">Arón BatallerAiz JaviertoAnne Marie Bermejo

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b. Needs Attachment

Setting this option will prompt the user to attach a file before he/she can change the "From" field value. Check the box to enable this rule.

The screenshot shows the 'Add Rules' configuration window. The 'Workflow' is set to 'Progress Workflow for New'. The 'Value' is 'Done' and 'To' is 'Rejected'. Under 'Restrictions', 'Assign Approvers' is selected with 'And' logic, and three approvers are listed: Aron Bataller, Aiz Javierto, and Anne Marie Bermejo. The 'Needs Attachment' checkbox is highlighted with a red box and is currently unchecked. Below it, there is a dropdown menu set to '<Select>' and a 'disable' checkbox. At the bottom, there are buttons for 'Save & New', 'Save & Close', and 'Back'.

c. Field Dependencies

Setting this rule will make another field in the module enabled or disabled. You can select the topic state and other module fields that are set through data maintenance.

- Select an available value from the dropdown selection.

The screenshot shows the 'Add Rules' configuration window. The 'Workflow' is 'Progress Workflow for New', 'Value' is 'Done', and 'To' is 'Rejected'. Under 'Restrictions', 'Assign Approvers' is selected with 'And' logic, and three approvers are listed. The 'Needs Attachment' checkbox is checked. The 'Fields Dependencies' dropdown menu is open, showing options: '<Select>', 'New Idea Type', and 'State'. At the bottom, there are buttons for 'Save & New', 'Save & Close', and 'Back'.

- Check the box to make the selected field disabled in the module. If unchecked, the selected field will always be enabled.

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- To add more dependent fields, click “+Add New” option to open new selection.

Note: You cannot set conflicting rules. If you do not see the desired field in the selection, it means that the field is either set to enable or disable in another field rule and might conflict with your rule.

d. Saving buttons:

- Save & New – save the rules and create another rule.
- Save & Close – save the rules and return to rules summary table.
- Back – close the add rules window without saving the new rule.

How to add and edit field values?

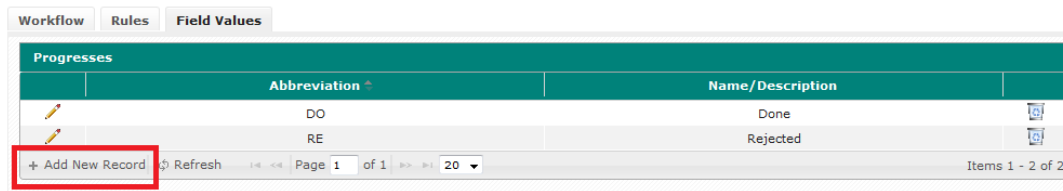
You can add values through “Field Values” tab. Field values are the values that are visible in the module field selection. Defined values can be used in creating workflows. Once a user selects a workflow for the field, some values might be disabled or enabled depending on how the workflow is defined.

- Follow steps 1 to 3 in [How to create Workflow](#).
- Click the Field Values tab from the field Workflow page.

Workflow Title	Updated By	Updated On	Usage Count
Progress Workflow 2	Char Lot Bataller	06Aug2014	0
Progress Workflow	Char Lot Bataller	05Aug2014	0
Progress Workflow for New Ideas	Char Lot Bataller	05Aug2014	0

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3. Click the “Add New Record” button from the left bottom part of the summary table.



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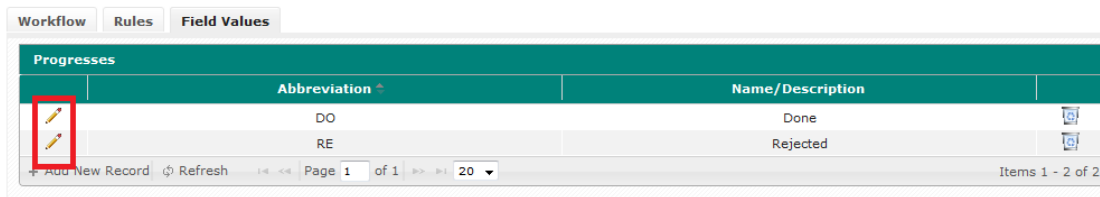
4. Define abbreviation and name/description of the value.

The 'Add New Record' dialog box has a title bar with a close button. It contains two input fields: 'Abbreviation' and 'Name/Description'. At the bottom, there are 'Save' and 'Cancel' buttons.

Note: Abbreviations are usually displayed in the summary table of the module.

Names/Descriptions are displayed in the dropdown selection in add/edit page of the module, in the search functionality and as tooltips in the upon hovering over the abbreviation in the module's summary table.

5. Saving buttons:
 - Save – save the new value and close the window.
 - Cancel – close the window without saving.
6. You can also edit the value by clicking the pencil icon in the summary table. The steps are the same as adding a new value.



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