Business Process Management

For *Priority* users moving to Version 11 or higher

Dear Customer,

Following your move from Version 10 (or below) to Version 11 (or above) of ***Priority***, this document aims to aid you in defining workflow (document statuses) – or, as it is now called, **Business Process Management (BPM)**.

Throughout the system you will find **BPM flow charts**, which you use to define statuses, as well as the rules that apply to them and the paths between them (authorized status sequences). Many of the options in this flow chart were available in your previous software version (e.g., restrictions on the next possible document status, authorization of users to change a status, automatic e-mail messages generated by a status change). In the new release, you can apply these options – and additional ones – in a friendly graphic interface that provides a chart-like representation of each business process you want to put into effect.

The status forms that you used previously continue to appear, but they are now meant solely for viewing existing statuses and their properties. That is, you can no longer use them to make revisions or add new statuses.

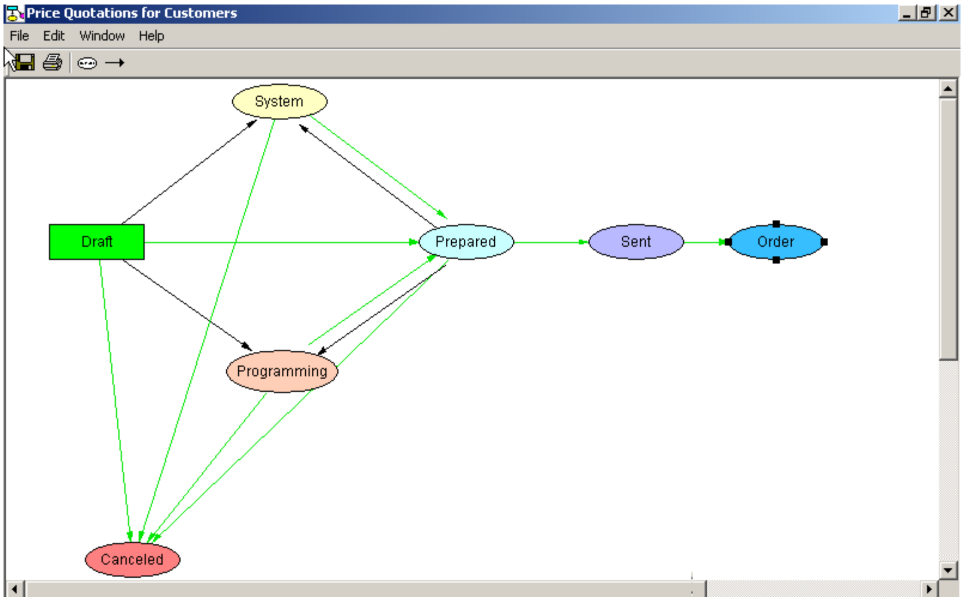
All statuses defined in your older version of ***Priority*** have been copied to the new release, together with their existing properties. In addition, all automatic mail definitions have been retained in the form of BPM rules. Those definitions recorded in the previous release in the **Choices for Next Status** form are kept as well, and appear in the flow charts as paths. Finally, those restrictions formerly defined in the **Permitted to Select This Status** and the **Permitted to Change This Status** form must be redefined. A special report called **Status Change Restriction-ver10** displays such definitions for each document, facilitating their recreation as BPM rules for paths between statuses (see p.9).

While in the initial process of defining statuses, it is recommended that you select the **Disable Path Definitions** command (in the **Edit** menu of each flow chart), so as to temporarily disable the paths between statuses in the form in which you are working (though properties and rules remain in effect). This command is useful when you are editing a flow chart for a transaction form that is in daily use, and your work is causing difficulties for those using the form in question.

You can also deactivate any given status rule (by removing its **Active** flag) so as to allow work to continue without restriction on the form in question. Again, once you are satisfied with results, you can reactivate the rule (note, however, that the rule must be active in order to be tested).

The following pages provide detailed instructions for using the BPM flow charts. Similar instructions can be found in the **User Interface Guide**.

Priority provides a friendly graphic interface with which you can define **statuses** and link them together into defined sequences by means of **paths.** Both statuses and the paths that link them may be assigned user-defined **rules** that trigger a variety of automatic features when certain conditions are met. The end product is a sophisticated workflow mechanism that optimizes the efficiency of the process in question.



The BPM flow chart for price quotes

Each major document in a defined work process has its own flow chart. The first time that you open each chart, it will display the default statuses predefined for that particular document, as well as any statuses already defined in your previous version of ***Priority***. Existing status properties (e.g., **Allow Revisions**, **Final Document**) and paths between statuses will continue to apply, but may be revised.

Creating Paths Between Statuses

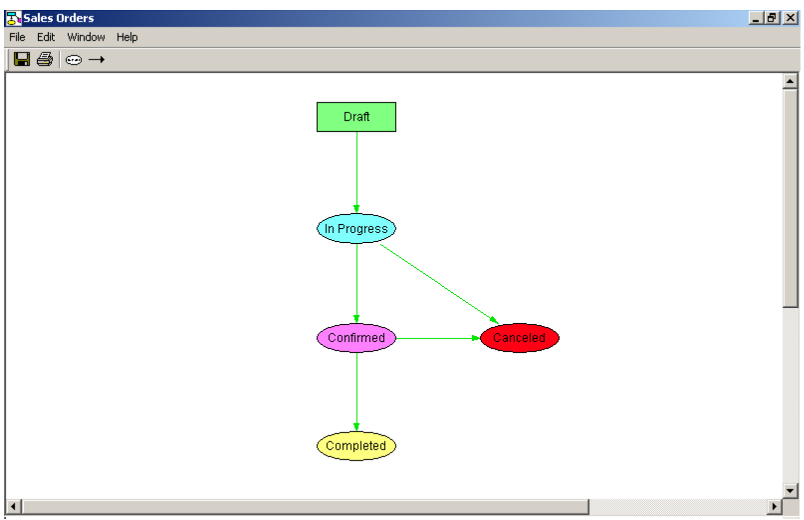
Paths determine the available options for moving a transaction document from one status to another. Represented by arrows in the flow chart, paths reflect the order in which the various processes in a transaction must take place. When attached to rules, they may also determine the conditions under which a status may change, as well as the way a transaction is processed when it reaches the next status.

Tip: Use the **Disable Path Definitions** command, accessed from the **Edit** menu, to temporarily disable the paths between statuses in the form in which you are working.

Example:

To create a path from one status to another, perform the following steps:

1. Run the ***BPM Flow Chart – Sales Orders***.
   Tip: Use the menu path ***Marketing and Sales → Orders → Statuses for Orders***.
2. Move the default **Draft**, **In Progress**, **Confirmed** and **Completed** statuses into a straight vertical line, with the **Canceled** status off to one side.
3. Click the **Draw Path** icon on the flow chart's Toolbar (or select **Draw Path** from the **Edit** menu).
4. Put the cursor on the bottom of the **Draft** status. Keep the mouse button pressed and draw a line to the **In Progress** status. Release the mouse button.
5. Draw two paths from the **In Progress** status (one to the **Confirmed** status and one to the **Canceled** status) and two paths from the **Confirmed** status (one to the **Completed** status and one to the **Canceled** status).

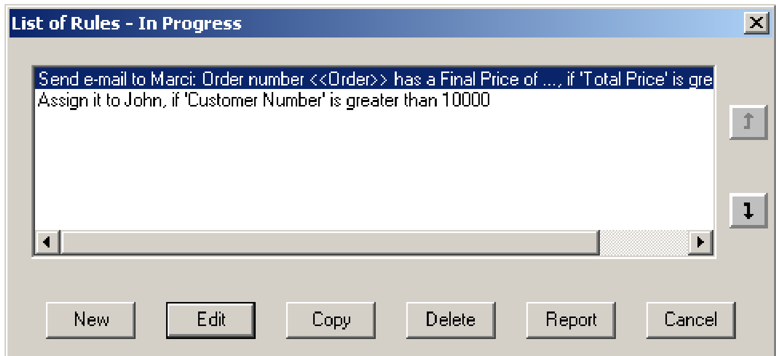


Drawing paths between statuses for sales orders

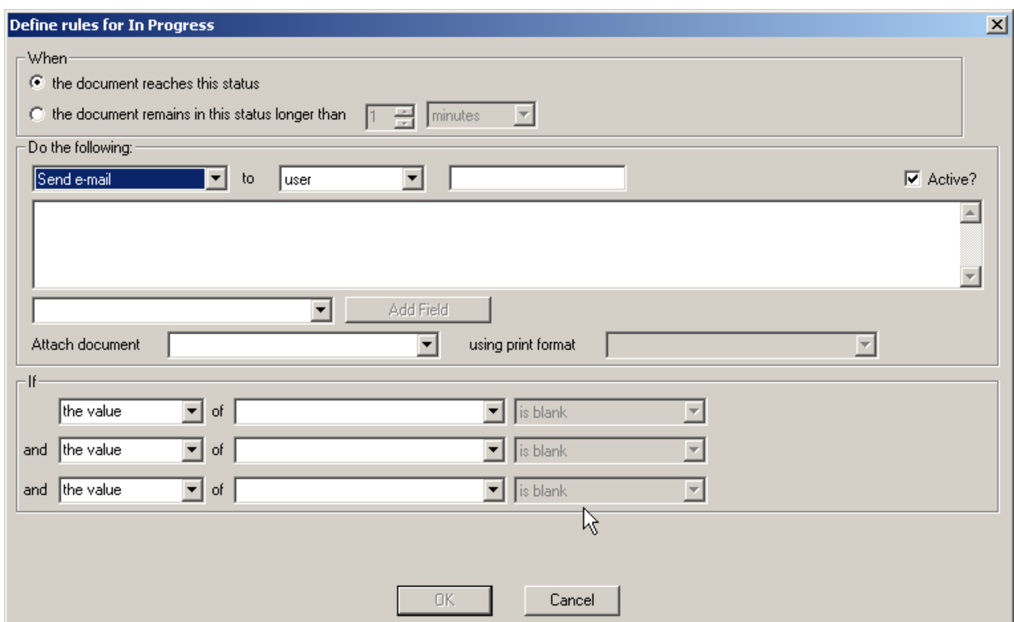
Defining Rules for Statuses

BPM allows you to monitor workflow by setting up rules that activate system responses when certain conditions are met. You can set up automatic e-mail or SMS notification when a document receives a certain status or remains in a certain status overlong, or re-assign the document to a higher-ranking employee (SMS support must be purchased in a separate module). You can use rules in tandem with data fields to define precise conditions for the activation of these responses (e.g., the size of the transaction, the importance of the customer).

There may be many such conditions defined for each status, some of which are likely to occur simultaneously. You can use the up and down arrows to the right of the **List of Rules** dialogue box (which appears whenever you open the **Define rules** dialogue box, after the first rule has been defined) to determine the precedence of such rules.



The BPM Rules dialogue box



The Define rules dialogue box

Assigning a Document to a User

One of the simplest and most important rules is that which determines the user to which the transaction is assigned at each stage of the process. This may be a specific employee of your company, or the first available member of a predefined group of employees.

Note: In the latter case, BPM uses defined employee hours and absences to determine who is the highest-ranked group member available to receive the assignment. For instructions on setting up groups, see the **User Interface Guide**.

Example:

Let's create a rule by which a sales order that exceeds a certain value is assigned to the sales manager when it receives the **In Progress** status:

1. In the sales orders flow chart, right-click the **In Progress** status and select **Rules**.
2. In the **Do the following** section of the **Define rules** dialogue box, select **Assign it** in the first text box and any username but your own (User X) in the third box. Click **OK**.
3. Now reopen **Rules**. The **List of Rules** dialogue box will appear, displaying the rule you just created. Click **New**.
4. In the **Do the following** section, select **Assign it** in the first text box, then select your own username in the third text box. Click **OK**.
   Note: For the moment we will pretend you are the sales manager.
5. In the **If** section, select **Final Price** in the second text box, **is greater than** in the third, and type "5000" in the fourth box that appears next to the third. Click **OK**.
6. Exit the flow chart (click **OK** to save your changes).

You have now defined the following rules for the **In Progress** status:

- sales orders in progress that are worth up to 5000 dollars are assigned to a User X, while
- sales orders in progress that are worth more than 5000 dollars are assigned to you (the sales manager).

Open or retrieve a sales order and adjust it so that its final price is over 5000. Now change its status to **In Progress**. Click the **Scheduling** tab and you will see your name in the **Assigned to** column.

Sending an E-mail or SMS Notification

It may be sufficient to notify the sales manager in the case of a large order, rather than reassign it.

Example:

Let's modify our previous example:

1. Reopen the flow chart, and right-click the **In Progress** status. In the **List of Rules** dialogue box, select the second rule we created in the previous example and click **Edit**.
2. In the **Do the following** section, replace **Assign it** with **Send e-mail** in the first text-box, and select yourself as the e-mail recipient.
3. In the message area, type “Sales Order No.”, then choose the **Order** column title from the Choose list under the message area and click **Add Field.** Continue the sentence “has reached a final price of over”, then choose the **Final Price** column title and click **Add Field**. Complete the sentence by adding “dollars.” Click **OK**.

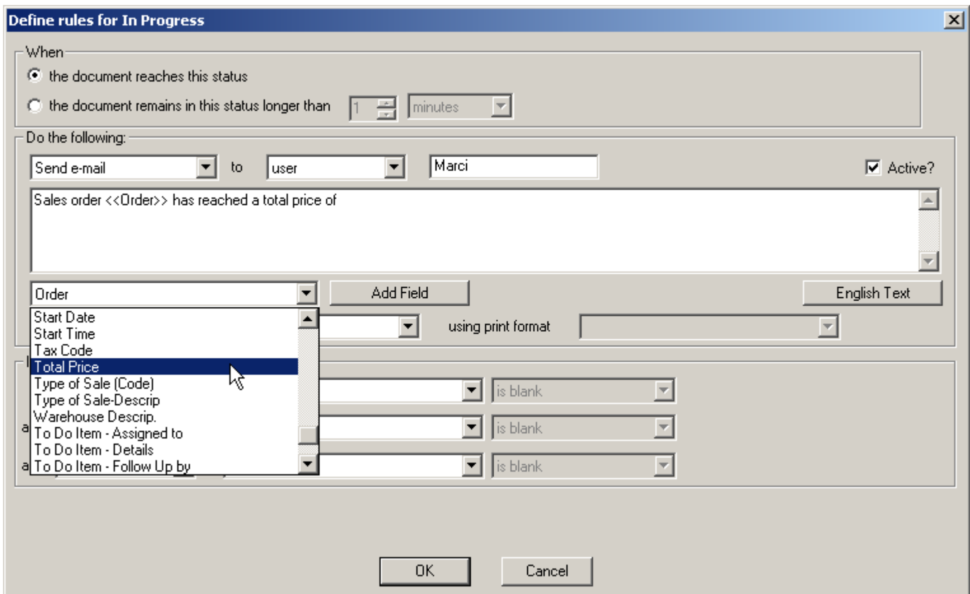


Illustration of the current example

Now open another order worth more than 5000. You will see that it is still assigned to User X. Now check your mailbox and look for your notification.

Note: The **Add Field** Choose list includes To Do items as well as form fields.

Transactions That Are Overdue For a Status Change

As mentioned previously, you can also reassign a document, change its status or notify an e-mail or SMS recipient when the document has remained in a particular status past a defined period of time.

Example:

1. Reopen the flow chart, right-click the **In Progress** status and select **Rules**. When the **List of Rules** dialogue box opens, click **New**.

2. In the **When** section, select the second option and specify two days as the permitted processing period.

3. In the **Do the following** section, select **Assign it** in the first text box, and your name in the third.

4. Click **OK**. Save and exit the flow chart.

From now on, if a sales order remains **In Progress** for over two days, it will be re-assigned to you (the Sales Manager).

Running the Tabula Task Scheduler

The above feature will only function if the **Tabula Task Scheduler** is running and has been set up properly by the system manager. The task scheduler scans all active documents for any defined time limits and activates the notification process when it finds an expired limit.

Basic instructions for setting up the scheduler can be downloaded from the Eshbel web site. In addition, the system manager needs to make sure that:

- the scheduler is being run from a non-system login account (e.g., *Administrator*) that has an MS-Outlook mail profile.
- the **Send reminders about document status** program is flagged as *Active* in the scheduler's **Task List**.

Note: It is recommended to decrease the frequency of the task scheduler scan to once every two hours in order to decrease the server's workload.

BPM Error Reports

A time-activated rule may trigger a change of user or status when such a change is not permitted in the document in question, for technical reasons. For example, a Customer Shipment may not receive the "Final" status if it has not yet been itemized. In such a case, the form in question usually presents an error message; however, since time-activated rules are applied automatically when the form is closed, error messages are not possible. Instead, ***Priority*** provides a report called **BPM – History of Errors** (menu path: ***System Management → System Maintenance → Periodic Maintenance → BPM Maintenance***) to document any behaviors that fail for this reason.

The system manager can set the **Tabula Task Scheduler** to send the error report to a designated e-mail address at regular intervals, where it can be checked routinely for failed behaviors. To do so:

1. Open the **Task List**.

2. Move to the task named “Send Reminders – error log by e-mail (change the address)” and click **Modify**.

3. In the **Command** window, move to the end of the command line and replace the phrase “any_email_address@mycompany.com” with the desired address.

Defining Rules for Paths

You can further optimize your workflow by assigning rules to the paths between statuses, rather than to the statuses themselves. This becomes necessary when it is possible to reach a particular status from several different preceding ones. Path rules allow you to assign specific events to a given status, but only when it is reached from a specific preceding status.

Path rules also allow you to designate which users or groups of users are permitted to move a document from one particular status to another. As with status rules, this rule can be made conditional on document data, such as the size of the transaction.

To help you reconstruct the restrictions placed on status transfers in ***Priority*** versions prior to Release 11, you can run a report in the **Privileges** sub-module called **Status Change Restriction-ver10**, which displays the users permitted to move to and/or from any given status. Use this report to create path rules that replicate these conditions.

Note: You will need to ask your System Manager for access to this report.

Example:

Let’s return to our sales order flow chart:

1. Reopen the flow chart. Right-click the path between the **Confirmed** status and the **Canceled** status, and select **Rules**.

2. In the **Do the following** section, select **Allow status change**. In the third text box, select any username (except yours).

3. Click **OK**. The new rule establishes that once a sales order has been confirmed, it can only be canceled by the specified user.

4. Save and exit the flow chart.

5. Open a sales order and assign it the **Confirmed** status. Now try to to change the status to **Canceled**.

If you want to disable a particular rule (for either a status or a path) you can remove the check mark from the **Active** option at the right of the **Define rules** dialogue box screen.

Creating New Rules from Existing Ones

An easy way to create a new rule for both statuses and paths is to copy an existing one and revise it. Simply select the desired rule in the **List of Rules** dialogue box (see illustration on page 5) and click **Copy**. A duplicate of the selected rule will appear, which you can rename and then revise by clicking the **Edit** button.

Note: To view all rules created for a given status or path, click **Report** on the **List of Rules** dialogue box.

Revising Statuses

To revise an existing status, right-click the status and select the desired command from the pop-up menu:

- **Rules:** Opens the **Define rules…** dialogue box.
- **Properties:** Opens the **Properties of…** dialogue box.
- **Set Color:** Allows you to select a background color for the status.
- **Rename:** Allows you to choose a new name for the status.
- **Delete:** Removes the status from the flow chart.

Note: Any status that you delete is stored in memory together with all other statuses that were defined in the system but are not in use in the current flow chart. You can access these statuses in the **Select Status** window, which appears whenever you activate the **Add Status** command.

A given document may be assigned numerous statuses. In order to keep your flow chart easily comprehensible, special care must be taken both in the color-coding of statuses, and in their physical grouping. For example, you may want to situate all statuses that involve closing, canceling or freezing the document at the bottom of the screen, and color them red.

Adding New Statuses

To add a new status to the flow chart, perform the following steps:

1. Do **one** of the following:

   1. Click the **Add Status**  icon.
   2. Select **Add Status** in the **Edit** menu.

2. Click the screen where you want the new status to appear.

3. The **Select Status** window will appear. Click the **New** button.

4. A dialogue box called **Properties of the New Status** opens. Record a **Name** for the new status, and flag the appropriate status properties.

Viewing a History of BPM Flow Chart Changes

Use the **BPM – Track Changes** form or report in the **BPM Maintenance** menu to view all changes made in any BPM chart (e.g., new status, path deleted, new rule, change in status or status attributes).

Printing a BPM Flow Chart

When you print a flow chart from the chart's Toolbar, the system also prints out the details of each of its statuses (e.g., definitions and rules).