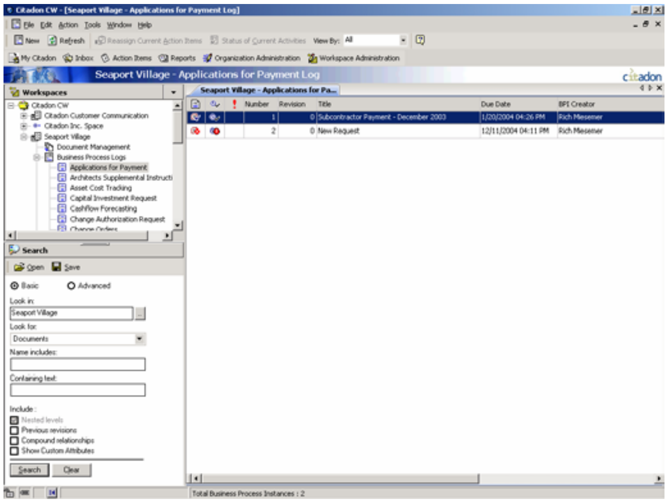
Creating Business Process Instances

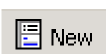
Quick Reference Guide

Creating a Business Process Instance

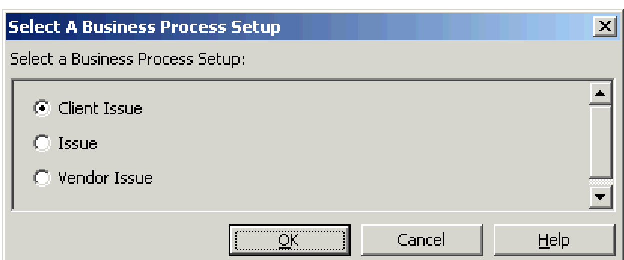


1. From the left-hand navigation bar, expand a workspace to acess the Business Process Logs

2. Select the desired Business Process Log by double-clicking on the name of the log.

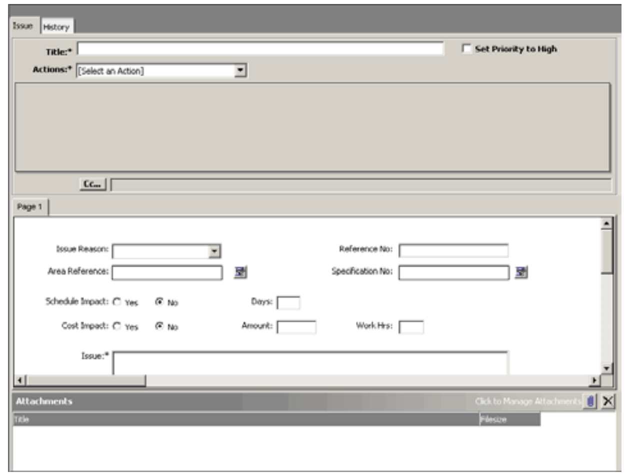
3. Click 

on the secondary menu above to create a new Business Process instance using this template.



4. Select the specific setup to be used and click **OK**. You will be presented with the setup form for the BP instance

Note: if only one setup exists for the business process, this window will not apear.



✍ Any field marked with an asterisk (*) is required. In this example, Title, Action, and issue are required fields.

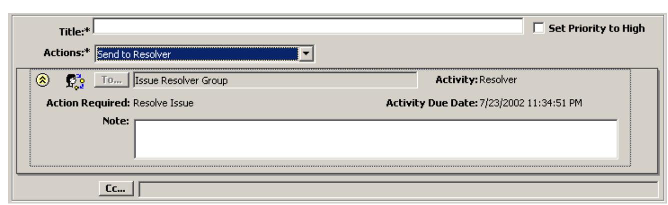
1. Enter a descriptive title for this instance in the Title field

2. Set the intended priority of this instance to “High”, if desired, by clicking the checkbox to the right.

✍ Choose a title that is descriptive, easily recognizable, and will stand out among the other instances. For example: “Review of Piping Specification 2498” is more descriptive than, “Piping Spec”.

1. Select the action to be taken by clicking on the Actions pulldown. In this particular setup, the creator of the instance has two choices, Send to Resolver or Close.

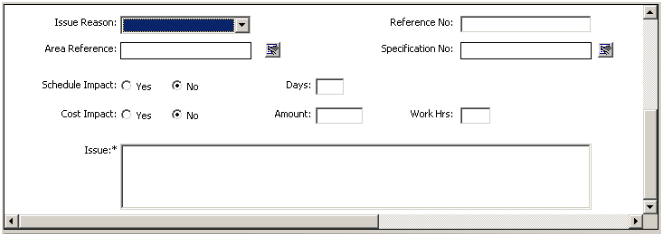
   The actions that appear here will be dependent on the template used as well as the setup that was created for this business process.



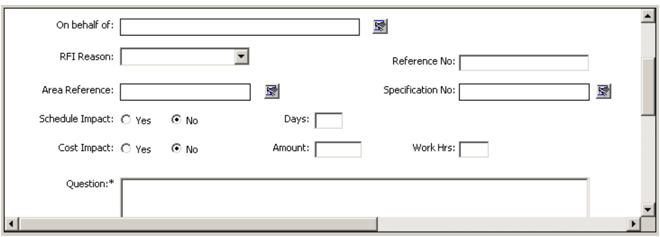
Once an action it selected, then the addressing fields appear. Instances can be sent to groups or individuals. In this case, a single group has been specified, so no input is allowed. In other setups selection is allowed or required. A Note can be entered here to give additional instructions or explanation for the recipient

The center section contains the input form for that template type. The particular fields that are displayed depend on the particular template chosen. Below are examples of the three form types. Just remember, any field with an asterisk (*) requires an input.

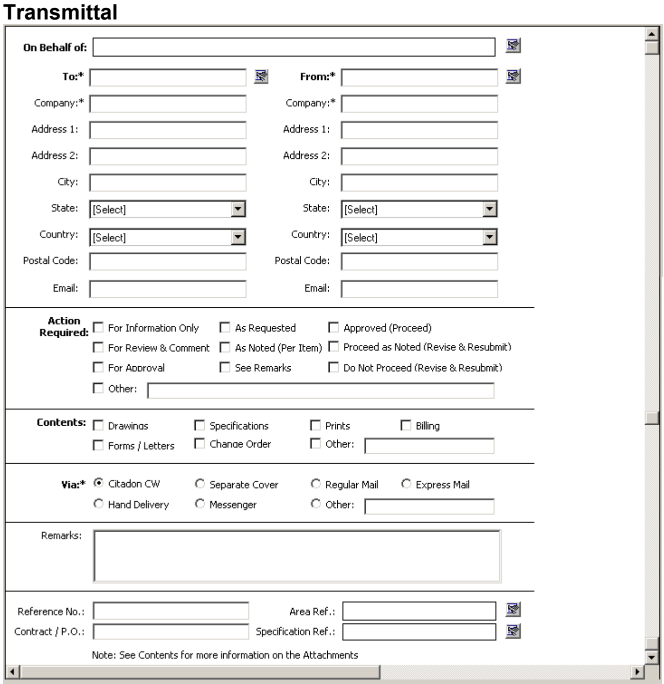
Issue



RFI



Transmittal



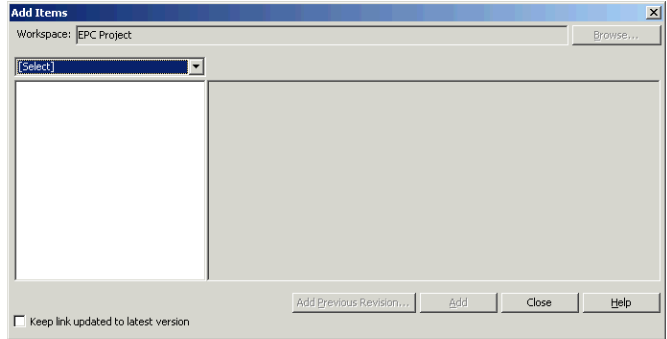
Each form has its own required and optional fields.

Note: Required fields are marked with an asterisk **(*)**

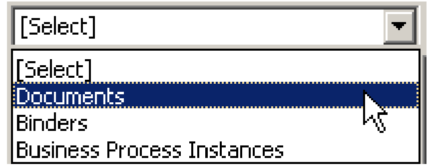
Adding Attachments

Depending on the setup, attachments can be added to the instance. The bottom of the form is where attachments are managed

Click the  to Add an attachment. Click the  to Delete an attachment. When adding an attachment the system presents the Add Items dialog, shown below.



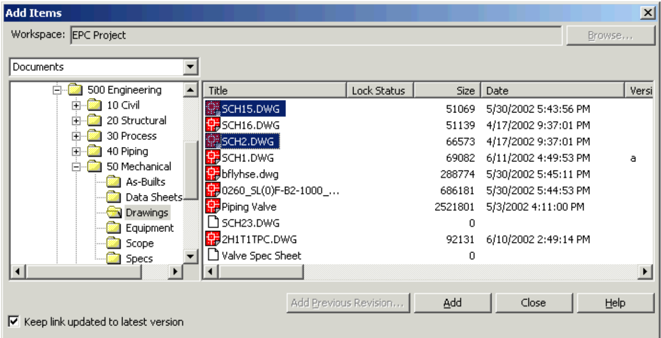
Use the Select drop down to select the type of attachments



Three types of attachments are supported:

- Documents
- Binders
- Business Process Instances (like this one)

Documents

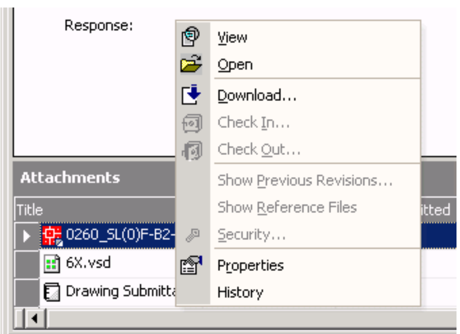


If documents are to be attached, CW presents a view of the Documents present in the workspace. Select the appropriate document(s) to be attached.

✍ Checking the "Keep link updated to latest version" box creates a dynamic link to the document. Any changes to that document are automatically presented whenever this attachment is viewed. If the box is unchecked, a static link is created and the attachment will not reflect any changes to the original document.

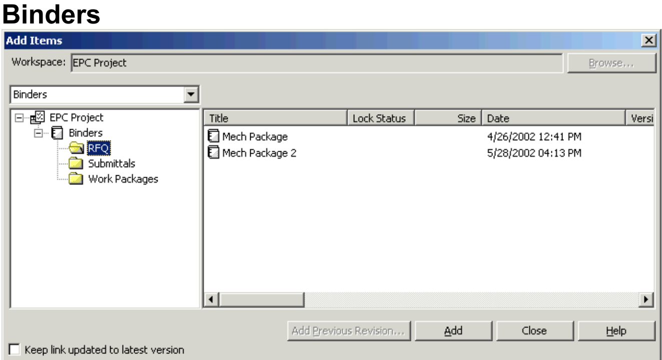
Click **Add** to add these documents to the instance.

Click **Close** when finished.



Once displayed in the Attachments section, documents can be **Viewed, Opened**, or **Downloaded** by right-clicking on the document. In addition **Properties** and **History** can be viewed.

Binders

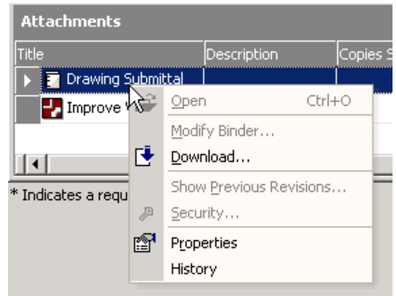


If Binders are to be attached, CW presents a view of the binders present in the workspace. Select the appropriate binder(s) to be attached.

Click **Add** to add these documents to the instance.

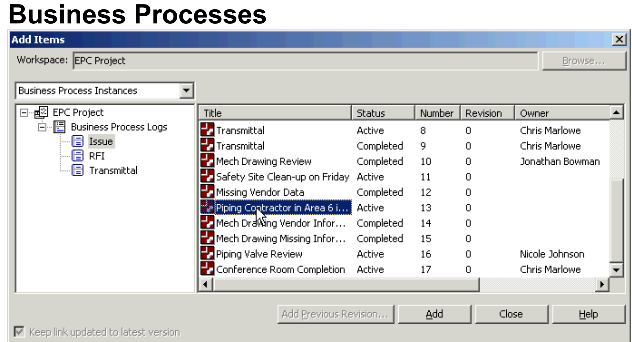
Click **Close** when finished.

✍ Checking the "Keep link updated to latest version" box creates a dynamic link to the binder. Any changes to that binder are automatically presented whenever this attachment is viewed. If the box is unchecked, a static link is created and the attachment will not reflect any changes to the original binder.



Once displayed in the Attachments section, a binder can be **Downloaded** by right-clicking on the binder. In addition, a binder's Properties and **History** can be viewed.

Business Processes

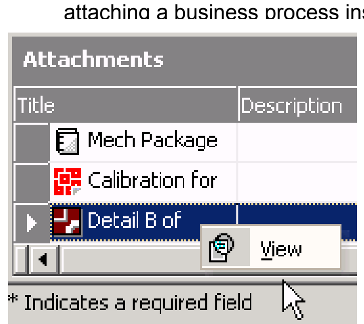


If Business Processes are to be attached, CW presents a view of the Business Process Log for that workspace. Select the appropriate template and then the desired business process instance to be attached.

Click **Add** to add these documents to the instance.

Click **Close** when finished.

✍ Links to business processes are always dynamic. For that reason the "Keep link updated to latest version" box is always checked when attaching a business process instance.



Once displayed in the Attachments section, business process instances can be **Viewed** by right-clicking on the business process instance.

Send

When all the parts of the business process instance are ready, the instance can then be sent to the recipient. This is done by clicking

on the secondary menu.

Citadon Customer Support

Citadon CW

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mailto:support@citadon.com