Concepts

Processes

Processes are well-defined sets of actions, data, participants, and workflow. A process can be procedures such as a "New Hire", a "Purchase Order", or a "Product Return". Processes are made up of three main elements. First, processes contain data elements, which make up the information necessary to implement and complete the process. Second, a process defines the users and roles necessary to perform and complete a process. Third, actions define what actually happens in a process.

Processes can be initiated manually from the Web Interface, can recur on a defined schedule, can be started by receiving an email, or started via company's external web server.

Data Elements

Data elements can be items such as an address, phone number, purchase cost, office number, appraisal amount, etc. Data elements are made up of text, numbers, dates, documents, and logs.

Process data is supplied by process participants through the web interface using "task" actions.

Participants

A process defines which users and roles are responsible for different tasks in the process. A specific person, or a group of people making up a role can be assigned to various aspects of a process.

Roles

Roles are made up of one or more people, and/or one or more groups or other roles. A role can consist of "Customer Service" personnel, managers, safety coordinators, hourly employees, customer support, or others.

Tasks

Tasks are actions that require manual user intervention to complete. Tasks are show in the Task List in the Web Interface. Each task allows a user to view and/or update its data, as well as designate its disposition from the Task Detail page. Tasks can have priorities and due dates, and some may be re-assigned by managers.

Assignment

Tasks are either assigned to an individual, or a group of people. Once a user decides to work on a task, the user owns the task until it is completed, reassigned, or returned to its original group. Tasks are generally available to any member of a group until one person assumes ownership. Tasks can be reassigned by the task owner, or by the task owner's supervisor. Group Tasks can be assigned to each member of a group in instances where every member of the group must complete an assigned task. This is useful for items such as time sheets and status reports.

Other Actions

Besides Tasks, processes can be made up of other actions to help automate a business process. Some of these actions include branching based on process data, updating databases, sending email notifications, calculating data, allowing actions to run simultaneously, and waiting a specific amount of time. Other actions can be custom developed to interface to a company's existing data and systems.