



BPManager - Business Process Management

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<COVER>

Table of Contents

Foreword	0
Part I Introduction	3
Part II Basic Capabilities	3
Part III Features	4
1 A sequence of requests can be pre-defined, but it is not necessary	4
2 Requests can be cancelled, rejected or delegated	4
3 Recipient can either be a user or a group	4
4 Flexible attachment types	4
5 Mandatory attachments	5
6 Automatic tracking of chains	5
7 Application software such as an ERP system can trigger SLAP BPM requests.	5
8 BPM can be used to request application software actions.	5
9 Various delivery methods of notification	6
Part IV BPM Quick Start (Introduction)	6
1 Start the system	6
2 Enter users / groups	6
3 Enter request	6
4 Request Types	7
Part V User Manual	7
1 Action links	7
2 General Information	8
Icons in the system	8
Main	9
3 Application	12
Login	12
Password Change	13
Exit & Logout	13
New Request	13
Request TAB (New Template).....	14
Attachments TAB.....	15
Next Step TAB	16
Notify TAB	18
Request Screen	19
My Work Queue.....	20
Create Child Request.....	20
Notifications	20
Issued Requests.....	21

4 Maintenance	21
Maintain User	21
User TAB	23
Group TAB	23
Address TAB	24
Maintain Group	25
Group TAB	25
Function TAB	26
Request Type TAB.....	27
Members TAB	27
Maintain Request Type	28
Add New Request Type.....	29
Permissions TAB.....	29
Mandatory Attachments TAB.....	30
Next Step TAB	32
Notification TAB.....	33
Maintain Notification Template	33
New Notification Template.....	34
Mandatory Attachments TAB.....	35
Maintain Attachment Type	35
New Attachment Type.....	36
Maintain Program Triggers and Notifications	36
New Program Triggers.....	37
Program Trigger Notifications TAB.....	38
 Index	 40

1 Introduction

BPManger is similar to e-mail in many ways, offering a method of sending messages and file attachments to other BPManger users.

But BPManger is also unique, offering three distinct kinds of messages:

- Requests
- Notifications
- Request Responses

BPManger allows the user to establish 'request types' and 'templates' for recurring kinds of requests.

BPManger is also similar in many ways to work-flow management software. But BPManger is usable immediately on installation without extensive business process analysis. Rather than conforming to strict pre-defined business processes, BPManger offers an adaptable method for filing, delegating, and completing requests within the organization. BPManger is designed so that managers and designated employees can add to, modify, and adjust the behaviour of business processes on the fly.

2 Basic Capabilities

- BPManger is used to issue requests to other participants of the SLAP system.
- Various items may be attached to the requests, such as:
 1. a document or file, or
 2. a hyperlink, or
 3. a link to application software such as an order or estimate number.
- Participants may be specific, named individuals (users), or identified by title or department (groups).
- The request recipient may delegate, reject or complete the request.
- Notifications of request actions may be sent over the SLAP network, by e-mail, fax, or by using an SSI product called Pipex.
- Each participant can use the BPManger program to handle outstanding requests, to review requests made, to read notifications, and to issue new requests.
- 'Request types' can be added by authorized personnel, such as managers to handle recurring requests. Requests of a given type are automatically routed to certain groups or users, and trigger subsequent requests on completion.
- Requests may, but do not have to be categorized by type.
- Requests can be stand-alone or automatically connect to the software program required to fulfill the request, such as a Purchase Order program within an ERP system. **(Not available in version 0.9)**
- Requests can be triggered by application software through an API. **(Not yet available in version 0.9)**

3 Features

3.1 A sequence of requests can be pre-defined, but it is not necessary

Request completion, delegation, or rejection can trigger a new request. The system can be set up so that a new request is triggered every time a request of a certain type is completed (or delegated or rejected), or the user can choose to add a next step request to any individual request sent out. Notifications also be established for every request of a particular type, or for individual requests.

Here is an example: When a new drawing is received from the customer by a customer liaison, you might like to send the drawing to Engineering. When the drawing has been reviewed, Estimating must determine if a new estimate should be developed. To handle this, you would create two request types - "Review drawing" which is handled by Engineering, and "Review for estimate" handled by the Estimating Manager. When Engineering indicates that "Review drawing" is complete, the "Review for estimate" action can be triggered automatically. If desired, the engineering department can be sent a [draft](#) of the action for release, before the action is sent to Estimating.

see

New Request: [Next Step TAB](#)

New Request: [Notify TAB](#)

Maintain Request Type: [Next Step TAB](#)

Maintain Request Type: [Notification TAB](#)

3.2 Requests can be cancelled, rejected or delegated

The requester can [cancel a request](#) at any time before completion by the request recipient. The request recipient has three options: [complete](#) the request, [reject](#) it or [delegate](#) it. The original requester can [trigger another request](#) for any or all of these actions, and can also determine who to [notify](#). Or, a subsequent request can be set up so it is triggered every time a [request of a given type](#) is completed, rejected or delegated.

3.3 Recipient can either be a user or a group

Request can be directed to a specific participant by name, or by responsibility or department. The latter cases are handled through [setting up 'groups'](#). For example, EstimatingDepartment might be a group. But, EstimatingManager could also be set up as a 'group'. This allows requests to be directed to whoever bears the EstimatingManager title.

3.4 Flexible attachment types

BPManager supports two kinds of [attachments](#):

- Files, such as a Word .DOC file, or an AutoCAD .DWG drawing
- Pointers to objects in an ERP system (or other application software), such as a Customer Request Form or an Order

File attachments are simply uploaded to the server and distributed to the request recipient(s) who can download them to his or her PC and view them.

Pointers to objects can be accessed through hyperlinks to the ERP system. For example, clicking on an Order attachment brings up the view order page for the selected order.

3.5 Mandatory attachments

Certain requests can only be sent when an object is attached. For example, a "Change Estimate" request might require an existing estimate to be attached. Other attachments may be optional, for example a "fix bug in program" request may or may not include a screen capture of the error message.

Other attachments may be required not when a request is made, but when it is completed or cancelled. For example, a "Create estimate" request can only be marked completed if the new estimate number is attached.

Whether a request requires an attachment or not can be set up through the [Request Type Maintenance](#).

3.6 Automatic tracking of chains

In BPManger, a "chain" is a sequence of requests or notifications. These sequences do not need to be pre-defined in the BPManger system.

BPManger tracks chains of requests as they occur. Reports can be extracted from the system to reveal the business process implicit in the chains.

The advantage of this approach is that managers can use the BPManger system to "get the job done", in the same order and progression they do today. BPManger provides an immediate benefit in improving communications and in reducing business cycle times. After a period of usage, reports can be produced to analyze inefficiencies and bottlenecks in the process flow. This information can then be used to streamline the process flow as defined within BPM.

3.7 Application software such as an ERP system can trigger SLAP BPM requests.

Requests can be made that are automatically based on certain conditions arising in application software. BPManger provides an API to initiate these kinds of requests directly from an application program. For example, when a record is saved, an order is cancelled, or an invoice run is completed, the ERP system can automatically make a request or notify the person responsible for the next step(s). The application software interface is extremely simple. The BPManger need only be passed a "[trigger point name](#)". BPManger itself will determine the requests that will be made based on the trigger.

Examples:

- The inventory level for a part goes below the warning level. Rather than running reports and checking them periodically, a request is immediately sent to a scheduler to review the re-order position.
- A credit limit has been exceeded by a new order or shipment...
- An important rush order has been shipped by the shipping department...

3.8 BPM can be used to request application software actions.

This can be done in one of two ways:

- A request made of the request recipient contains an [attachment](#) which is a link to an application software object such as an order or estimate number.

For example,

1. An estimator is asked to raise a new estimate. The link is a job or customer number.
 2. An estimator is asked to modify or cancel an existing estimate. The link is an estimate number.
 3. An inventory clerk is asked to cycle count a part. The link is a part number.
- A special type of 'notification' can be used to directly run an application program. For example, a request is made to run an inventory status report overnight.

3.9 Various delivery methods of notification

Those employees that are on the road or people that are not part of the organization can be notified in different ways:

- Internal (through BPM)
- E-mail
- Fax
- Text message to cellular phone
- Pipex

see

Maintain User: [Address TAB](#)

4 BPM Quick Start (Introduction)

4.1 Start the system

After installation of the system, double click the [BPM icon](#) on the desktop.

This will open the [main screen](#) where you can enter requests, check what is in your work queue and view all notifications sent to you.


In the default configuration (Panel View), this main screen is split into three parts (from top to bottom): your [work queue](#), [notifications](#) and [issued requests](#).


In the Notebook Configuration, these three parts become three separate TABs or pages.


4.2 Enter users / groups

From the Maintenance menu option select [Users](#).



Click the [Create new record](#) button . Enter the User information.

On the [Groups TAB](#) click the **Add new record** button  and select the Groups. Groups can be created once all users have been entered into the system.

On the [Addresses TAB](#) click the **Add new record** button . Select from the **Delivery Method** drop down box which option to use and enter the corresponding address.

4.3 Enter request

Click the [Create request](#) button beside the [Issued Requests](#) panel, or right click in the display area for a drop down menu of options. This will work in any of the 3 queues (**My Work**

Queue, Notifications and Issued Requests). Enter all information required to enter a request on the pop up window. (You can use the system with the default requests setup.)

Complete the information for [Attachments](#), [Next Step](#) and [Notification](#) if desired. To add any new items to these TAB's click the **Add new record** button.

If this request can be used in the future you can save it as a Template. Click the checkbox and enter a Template name.

Clicking the **Save Draft** button will save this request as a draft for some future release. This will be indicated by the draft column being set to **Yes**.

(This will allow the user to set up (develop) a process that is not yet ready for use in the system).

When all information is entered click the **Issue a request** button.

The new request will show up as an **Issued Request** in that corresponding panel and you can now take further action. The options are cancel the request, edit the request or create a child request by clicking the appropriate button.

Double clicking a request in any window will open a new window that will display all actions on this request with complete history. You then have the option to reject, delegate, complete or cancel this request.

To release draft requests select the appropriate one from the screen and click the [Release Draft](#) button, which will then activate this request and send it to the recipient.

4.4 Request Types

Add your own [request types](#) in addition to the default requests that come with the system. The default request actions of the system are: Request, Cancel, Complete, Delegate, Reject and Draft.

From the [Maintenance drop down menu](#) select **Request Types**.

Add new request for your own internal usage.

Set the [Next Step](#) and [Notification](#) information.

You need to set the [permissions](#) for this new request by selecting the appropriate group and action. If no permissions are set up, the new request will not be available to users.

5 User Manual

5.1 Action links

Setup or Maintenance

- [Users](#)
- [Groups](#)
- [Request Types](#)
- [Notifications](#)
- [Attachments](#)
- [Triggers](#)

Delivery options

- [Setup of e-mail](#) address for delivery via e-mail of a notification

Request Options

- [Enter a new request](#)
- [Attachments](#)
- [Next Step](#)
- [Notification](#)
- [Show my requests](#)
- [Show my notifications](#)
- [Show request I entered](#)

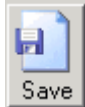
5.2 General Information

5.2.1 Icons in the system

From the [Options Menu](#), you can choose to view menu buttons such as **Save** as an image



, an image with text



, or as text only



by checking one or two of the two options.

Standard Icons used throughout the BPM system.



Request (New item in Database) / Save a Draft of a Request



Issue a new Request to User



Reject Request / Delete Notification / Cancel Request



Show/Hide the search Panel



Close this screen



Edit item in the maintenance screen



View a Parent request from Request view



Create a Child request from Request view



Add new record



Delegate Request



Create Child Request



Complete Request



Create Request



Edit



Release Draft



Drop down window selection options



Sort Data in ascending order



Sort Data in descending order



Checked checkbox (Allow or perform option)



Unchecked checkbox (Do not allow or perform action)



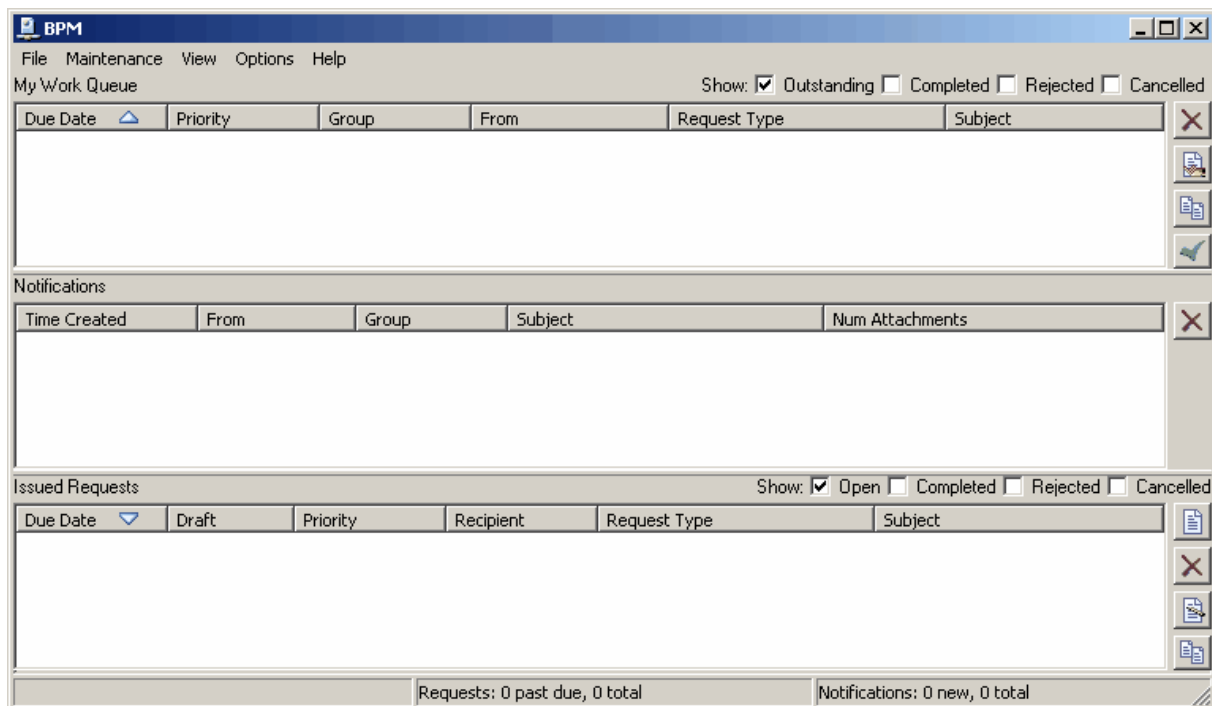
Open the calendar window for Date entry

5.2.2 Main

BPM main system.

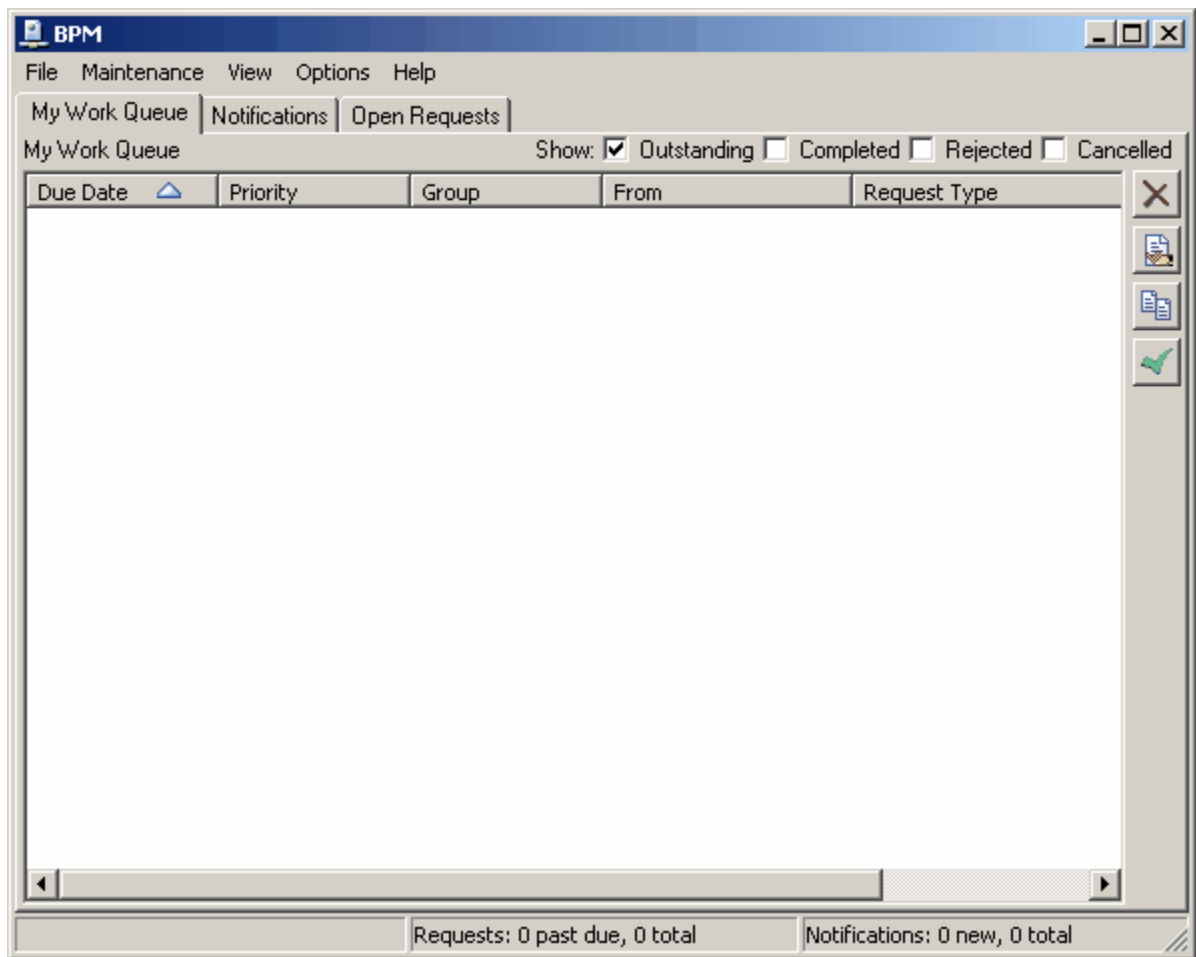
This is the default screen that will show on system startup. From here all activity can be initiated and reviewed.

The system default is set to Panel view.

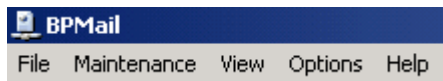


To change the view, select **View** from the top of the screen, then select either **Show as Panels** or **Show as Notebook**.

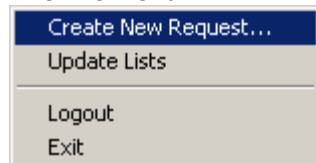
Notebook view.



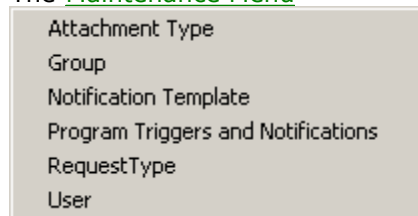
Menu options



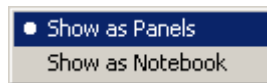
The File Menu



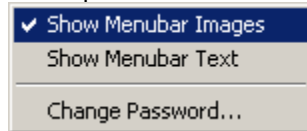
The Maintenance Menu



The View Menu



The Options Menu



The Help Menu

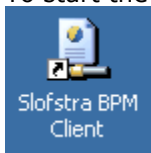


5.3 Application

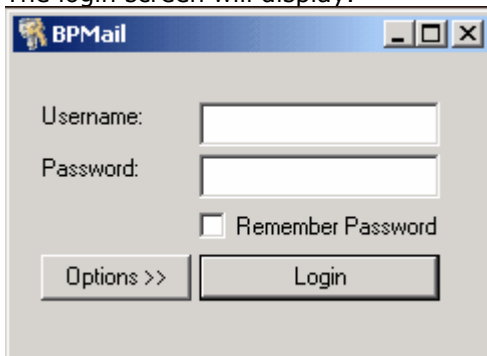
5.3.1 Login

Username and Password must be set up by the system administrator before you can access the system.

To start the system double click the BPM Client Icon on your desktop.



The login screen will display.



Enter your user name and password and press **Enter** or click **Login**. You can check **Remember Password** so the system will remember your password the next time you log in. For better security, leave this checkbox unchecked.

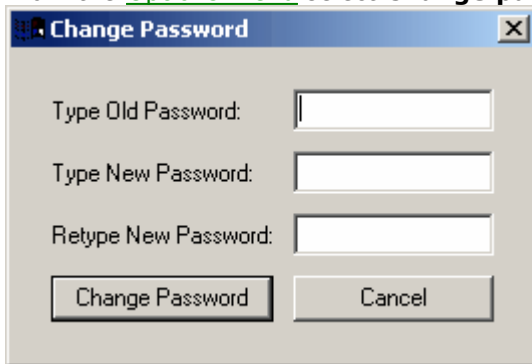


If you enter a wrong password, the system will respond with this error. Obtain the correct password from the system administrator or re-type it if you made a typing error.

5.3.2 Password Change

You can change your own password once you are an established user of the BPM system.

From the [Options menu](#) select **Change password...**



Enter the old and new password and retype it for confirmation. Click the **Change Password** button to change or **Cancel** to exit without changing.


5.3.3 Exit & Logout

The **Logout** option in the [File Menu](#) will take you back to the [login](#) screen, where you can login again.

The **Exit** option in the [File Menu](#) will exit the BPM system and finish this session.

5.3.4 New Request

Add a new request to the BPM system.

From the [File Menu](#) select the **Create New Request** option or click the **Create New Request** button  beside the [Issued Requests screen](#).

New request entry screen:

Add Request

Issue Request Save Draft Close

Request Attachments Next Step Notify

Request Template: [dropdown]

Request Type: Phone Call Received [dropdown]

Subject: [text box]

Body: [text area]

Recipient: User: BPM Administrator [dropdown]
 Group: admin [dropdown]

Priority: Normal [dropdown]

Due Date: [calendar icon]

Save as template

Template Name: [text box]

See: [Request TAB](#)
[Attachments TAB](#)
[Next Step TAB](#)
[Notify TAB](#)

5.3.4.1 Request TAB (New Template)

Add Request

Issue Request Save Draft Close

Request Attachments Next Step Notify

Request Template: [dropdown]

Request Type: Phone Call Received [dropdown]

Subject: [text box]

Body: [text area]

Recipient: User: Ernst Wuethrich [dropdown]
 Group: admin [dropdown]

Priority: Normal [dropdown]

Due Date: [calendar icon]

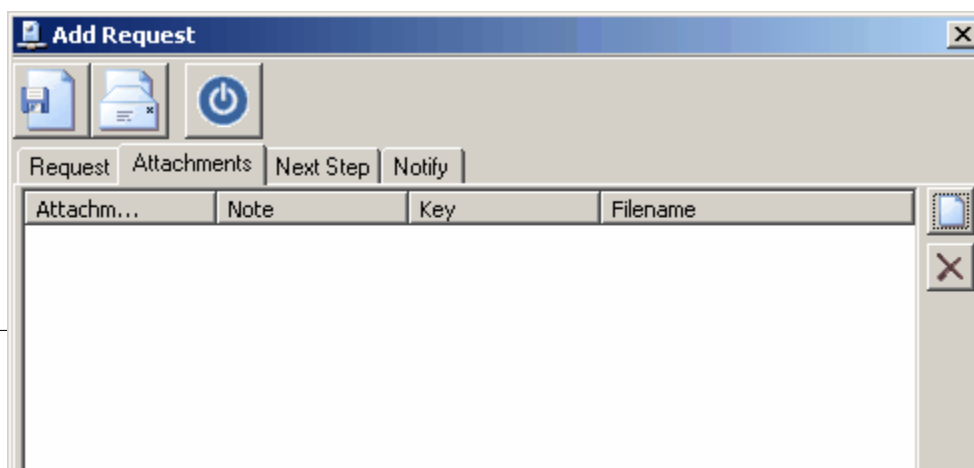
Save as template


- Request Template:** To use a request template, select one from the drop down box. If the desired template is not in the list, the user can [create a new template](#). To create a request without a template, simply leave the field blank.
- Request Type:** Select from the drop down window. If the desired request type is not available, the user can [create a new request type](#).
- Subject:** Enter a subject heading (usually a quick summary of the request).
- Body:** Enter any information into the Body text box.
- Recipient:** Select either User or Group, and then select the appropriate User or Group from the drop down box. If the desired User or Group is not available, [create a new group](#) or [create a new user](#).
- Priority:** Select the appropriate priority from the drop down window (Normal is the default).
- Due Date:** Enter the due date. To use the calendar click the calendar icon and select the appropriate date by double clicking it. The bottom of the recipient's main screen will show when he or she has passed the due date on any request, and the overdue request will be shown in red in the sender's and receiver's work queues.
- Save as Template:** Select this check box to save this request as a new template so that if similar requests are issued in the future, the same information does not need to be re-entered. Enter the Template name in the **Template Name** field. For future requests, this request will be available in the **Request Template** drop down box. Any Request showing in the **Issued Request** panel on the [main screen](#) can be saved as a Request Template. Highlight the request and right click the mouse, then select **Save as Template** from the drop down menu and enter a Template name.

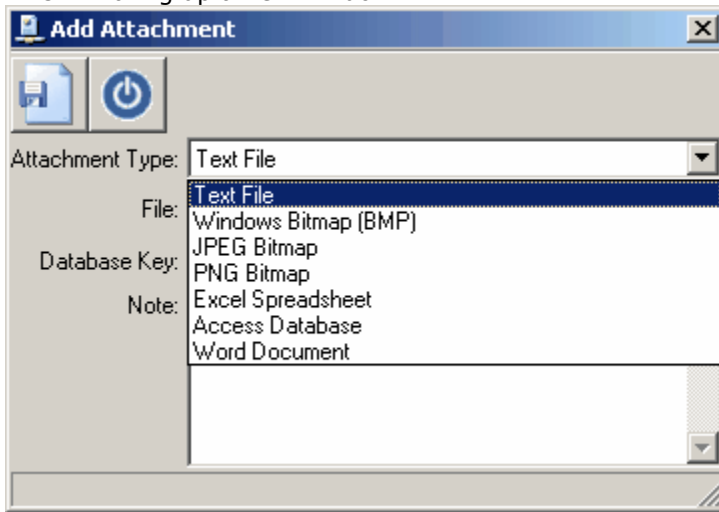
To save the request as a draft, click the **Save Draft** button and the request will be added to the [Issued Requests screen](#), but will not yet be sent out to the recipient.

If the request is complete, click the **Issue Request** button. Or, add [attachments](#), [next steps](#), or [notifications](#).


5.3.4.2 Attachments TAB



To add a new attachment click the **Add new Record** button . This will bring up a new window.



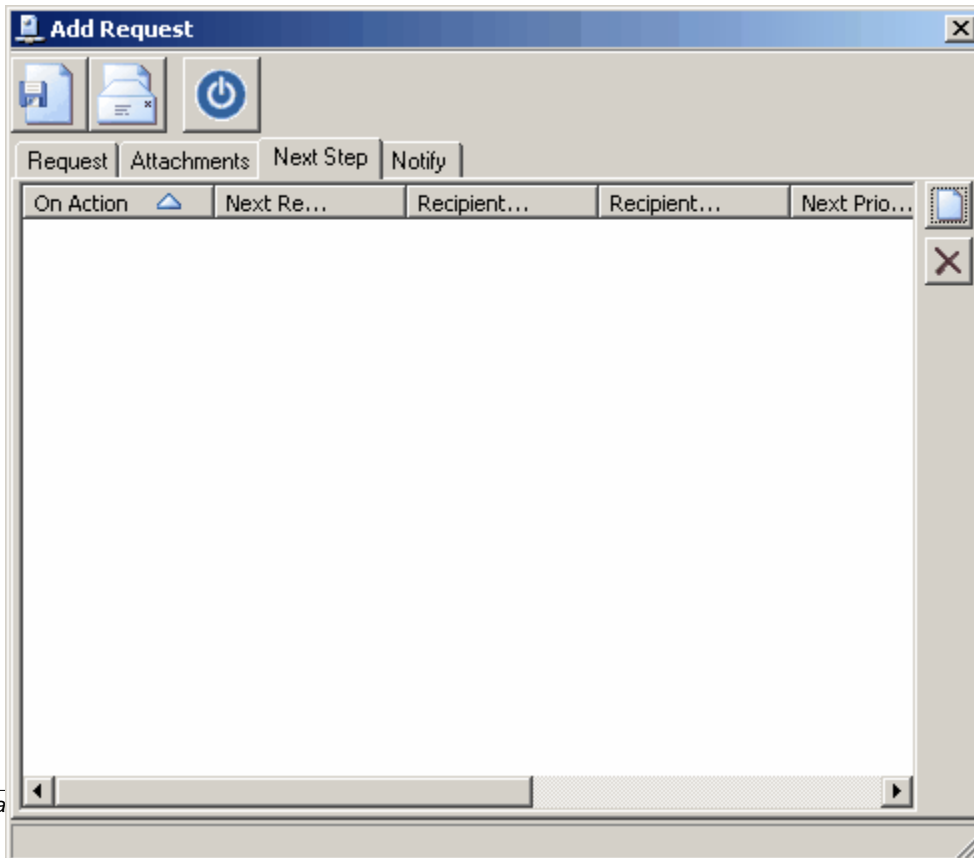
Attachment Type: Select from the drop down window options. If the desired Attachment Type is not available, see [Maintain Attachment Type](#) to add a new type.

File: Enter the file name or click the **Choose a file to attach** button . Select a file from your computer and press **Open**.

Note: Enter any text pertaining to the attachment.

When all selections are completed click the **Save & Exit** button.

5.3.4.3 Next Step TAB




Next Steps can be added to any request. A next step is a request that is sent automatically following the completion (or rejection or delegation) of the prior request.

For example, you might send out a request for an employee to review a report for errors and make any necessary corrections. You might add a next step so that when the employee is finished reviewing and presses **Complete**, a request is sent automatically to the printer asking him or her to print the report.

To delete a step from the next step window, select the desired step and click the **Delete** button



To add a new **Next Step**, press the **Add new record** button .

On Action: Select from the drop down window. This determines when the next step will be sent. For example, select **Complete** and the next step will be sent as soon as the first request is completed.

Next Request Type: Select from the drop down window. If the desired request type is not available, the user can [create a new request type](#).

Recipient User: The user or group who will be receiving the next step request. Select either **User** or **Group**, and then select the appropriate user or group from the drop down box.

Next Priority: Select from the drop down window.

Next Subject: Enter a subject heading (usually a quick summary of the request).

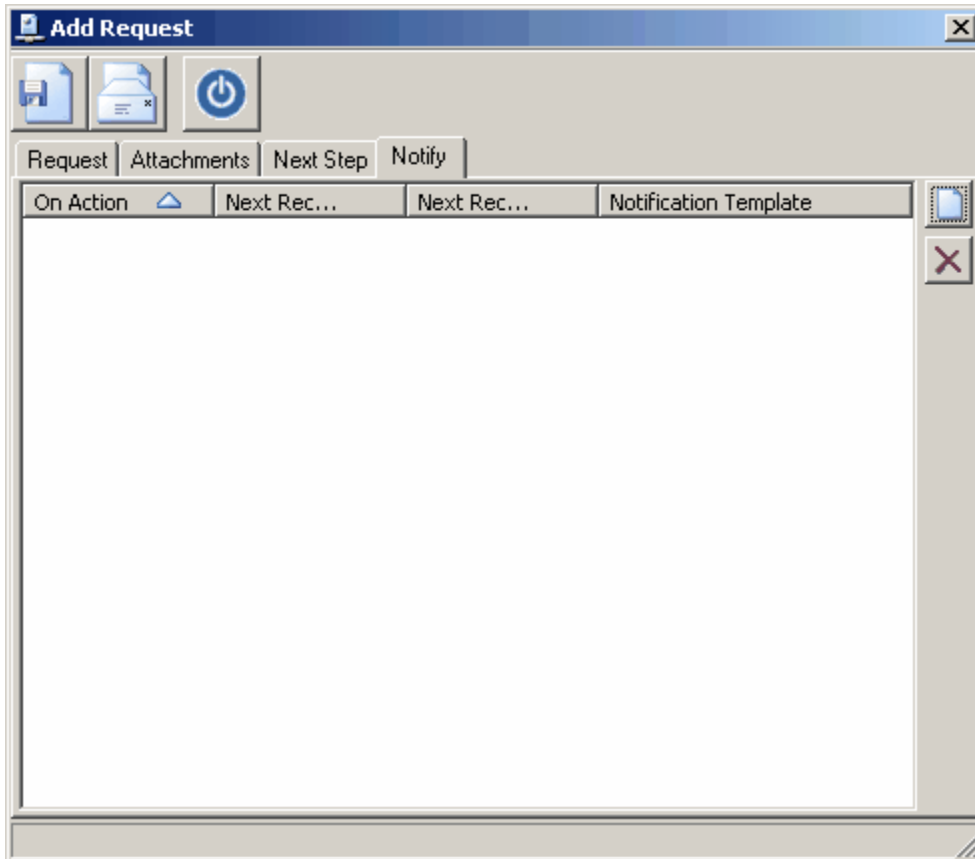
Next Body: Enter any information into the Body text box.

Draft: Check the draft box if the next step request is a draft. Instead of being sent, the request will be added to the sender's [Issued Requests screen](#)


where it can be edited, deleted or sent out.


Click the **Save & Exit** button to save the new step entered.

5.3.4.4 Notify TAB



Notifications can be added to any request. A notification is a message that is sent out automatically to a specific user or group once a request has been completed (or rejected or delegated), or when a certain request has been sent out. For example, a request can be set up so that when the recipient fulfills the request and selects **Complete**, a notification is sent to the sender, simply informing him or her that the request has been completed.

To delete a notification from the notification window, select the desired notification and click the **Delete** button .

To set up a notification to be sent automatically, select the **Add new record** button .

This will bring up a new window.

On Action: Select from the drop down window. This determines when the notification will be sent. For example, select **Complete** and the notification will be sent as soon as the request is completed.

Recipient: Check User or Group and select who the notification should be sent to.

Notification Template: Select from the drop down window. If the desired template is not available, the user can [create a new notification template](#).

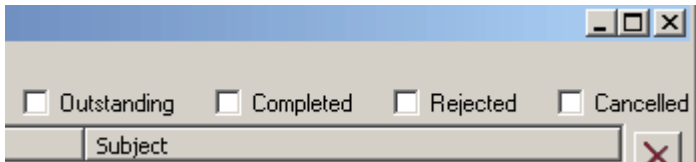
Click the **Save & Exit** button to add the notification.

5.3.5 Request Screen

The screen is split into 3 working sections.

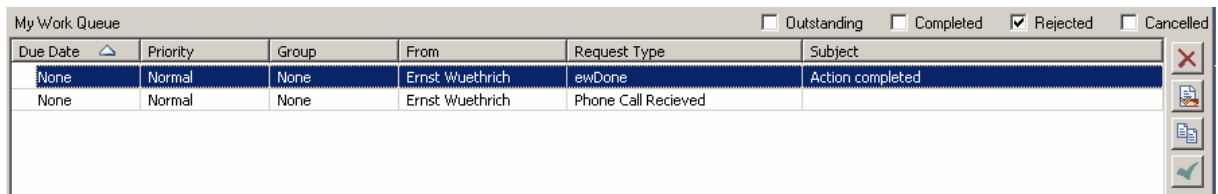
- My Work Queue (Top):** Requests in your current work queue.
- Notifications (Middle):** Notifications sent to you.
- Issued Requests (Bottom):** Requests that you have issued to others or yourself.

5.3.5.1 My Work Queue



Check the appropriate boxes to see the data in your work queue. If you would like to see all the completed requests select the **Completed** check box. All requests that have been completed by you or by someone in the recipient group will be displayed on the screen.


To respond to a request displayed on the screen, select the request with a mouse click, then click the appropriate action button on the right hand side of the screen.



You can **reject** , **delegate** , **create a child request** , or **complete**  the highlighted request.

5.3.5.1.1 Create Child Request


Requests can be linked together as a chain. When a request in a chain is sent out, the request it is linked to is called its **Parent Request**, and any request that is linked to it is called its **Child Request**.

To create a **Child Request**, select the request to link it to in either the [My Work Queue screen](#), or the [Issued Requests screen](#) and press the **Create Child Request** button . This will open the [New Request screen](#).

To view a request's Parent Request, double click the desired request in [My Work Queue](#), then

select **View Parent** .

5.3.5.2 Notifications






This middle section shows all [notifications](#) that have been sent to you. You can delete notifications from the window by selecting them and then clicking the **Delete Notification** button .

5.3.5.3 Issued Requests




Check the appropriate boxes to display Requests that you have Issued that are still **Open**, or have been **Completed**, **Rejected**, or **Cancelled**.

To work with a specific request select it with a mouse click.
Use the different action buttons to perform the desired action for the selected issued request.

The options are: **Create Request** , **Cancel Request** , **View request** , **Create Child request** , and **Release Draft** .

If a request is a draft, the **Draft** column of the request will display **Yes**. This means the request has not yet been sent to the recipient.

To edit the draft, double click on it to open the request screen.

To send the draft to the recipient as a request, click on the draft and select the **Release Draft** button .

5.4 Maintenance

The Maintenance menu, found by clicking **Maintenance** at the top of the main screen, can be used to change, delete, or add new records to the database.

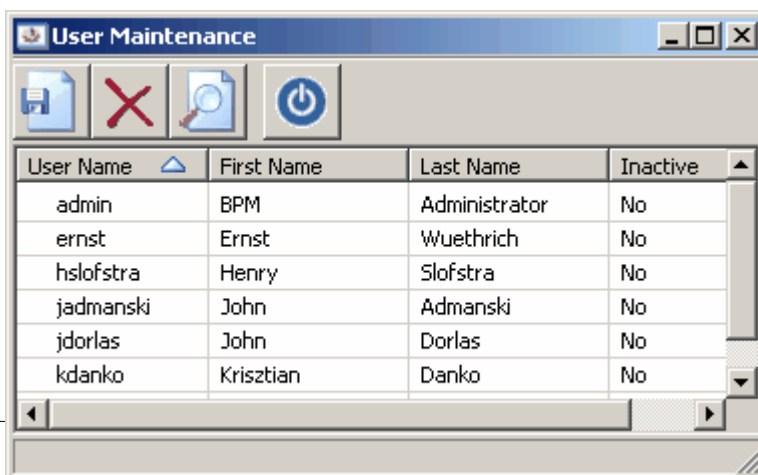
The Maintenance menu options are only accessible to users who have been granted permission through the Maintain Group: Function TAB menu option.

Select one of the menu options to begin making changes.

See Maintain:

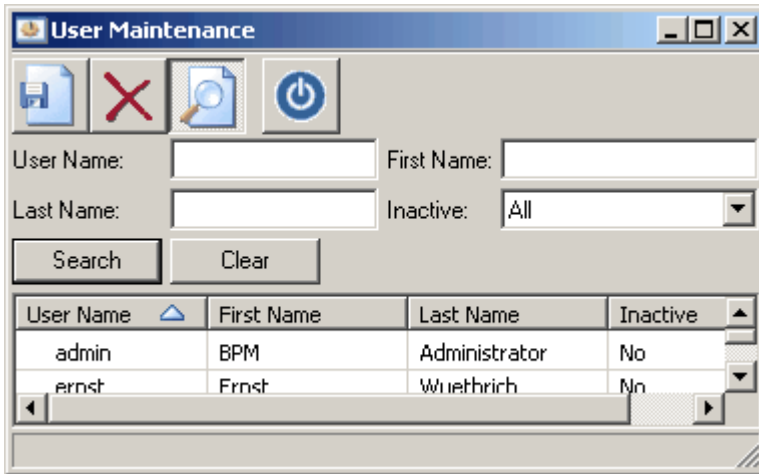
- [Attachment Types](#)
- [Groups](#)
- [Notification Templates](#)
- [Program Triggers and Notifications](#)
- [Request Types](#)
- [Users](#)

5.4.1 Maintain User



User Name	First Name	Last Name	Inactive
admin	BPM	Administrator	No
ernst	Ernst	Wuethrich	No
hslofstra	Henry	Slofstra	No
jadmanski	John	Admanski	No
jdorlas	John	Dorlas	No
kdanko	Krisztian	Danko	No

With this screen the administrator can add a new user to the database, change an existing user, or delete a selected user. By clicking on the search button the administrator can show/hide the search window.



The administrator can search for users by entering in any of the available fields to find a specific or multiple users. After entering the search criteria click the "Search" button. Clicking the **Clear** button will show all users in the system.



[Create a new user.](#)



Delete a selected user from the database.



Show/Hide the search option window.

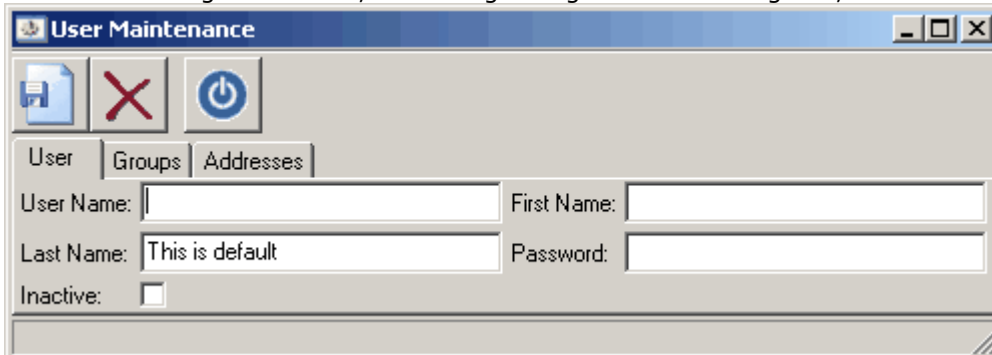


Close the User Maintenance window and return to BPM main screen.

Click the **Close** button to return to the BPM main screen.

To add a new user, press the **Create a new user** button, or double click on an existing user to make changes to that user.

Whether creating a new user, or making changes to an existing one, a new window will open.



Fill in or change the information in the [User](#), [Groups](#), [Addresses](#) tabs.

5.4.1.1 User TAB

Fill in or edit the **User Name**, **First Name** and **Last Name**.

The User Name is what the user will use to [login](#).

If a new user is being created, the **User TAB** will also have a field for the new user's [password](#).

To change the password of an existing user, see [Password Change](#).

5.4.1.2 Group TAB

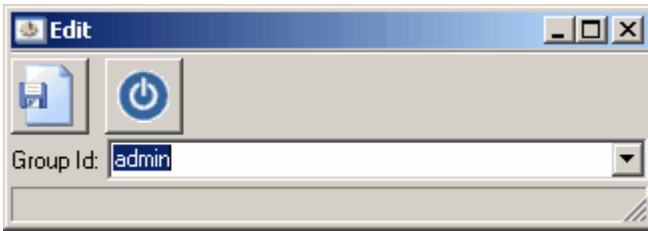
Clicking the **Group** TAB will allow the user to make changes to the groups in which the user is included.

To add the user to a new group, press .

To change which group(s) the user is a part of, select one of the groups listed, and press Edit



This will open a new window.



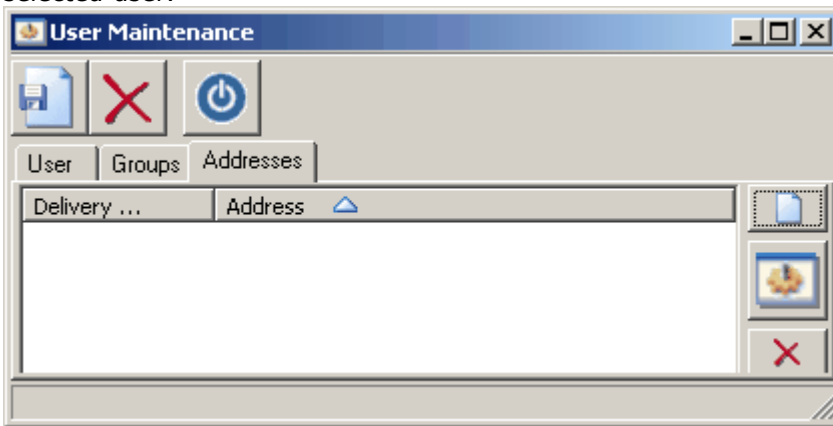
Select a new **Group Id** from the drop down window by clicking the arrow on the displayed name window.

If the desired Group is not available, add a new group through the [Maintain Group](#) menu option.

Or, to remove the user from a group, highlight one of the groups listed, and select delete

5.4.1.3 Address TAB

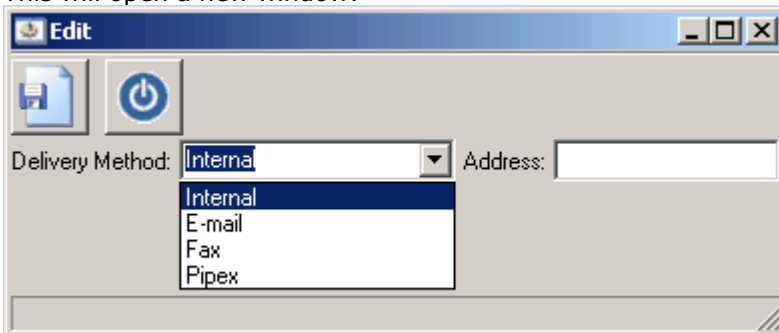
Clicking the **Addresses** TAB will allow the user to make changes to the contact addresses of the selected user.



Click the **Add new record** button to add a new address to the user or

Click the **Edit** button to change a selected address.

This will open a new window:



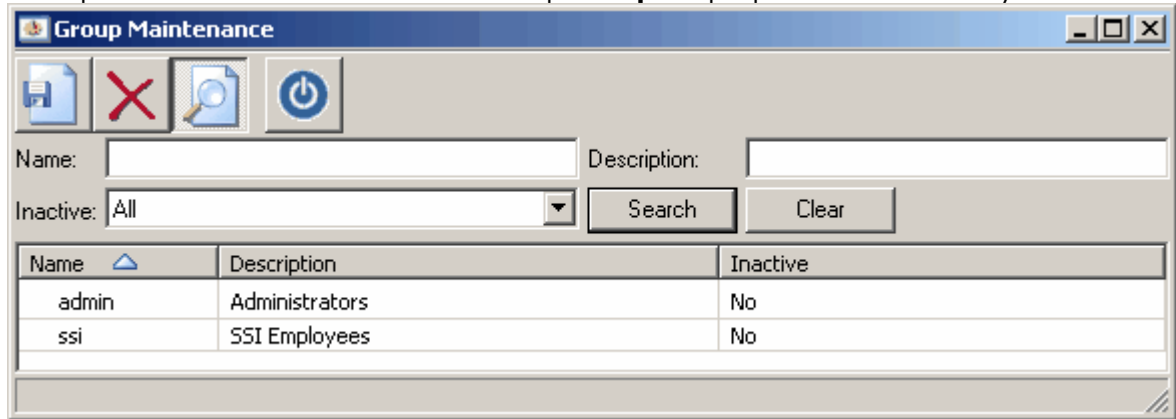
Select address method from the **Delivery Method** drop down window. Enter the appropriate address corresponding to the Delivery Method.

- Internal: No address is required.
- E-mail: Enter the e-mail address for the person that is to receive an e-mail informing them of the request.

Fax: _____ Enter the fax number where to fax the request notification.
 Pipex: ????

5.4.2 Maintain Group

This option allows the administrator to set up **Groups** of people within the BPM system.



Name	Description	Inactive
admin	Administrators	No
ssi	SSI Employees	No



[Create a new group.](#)



Delete a selected group from the database.



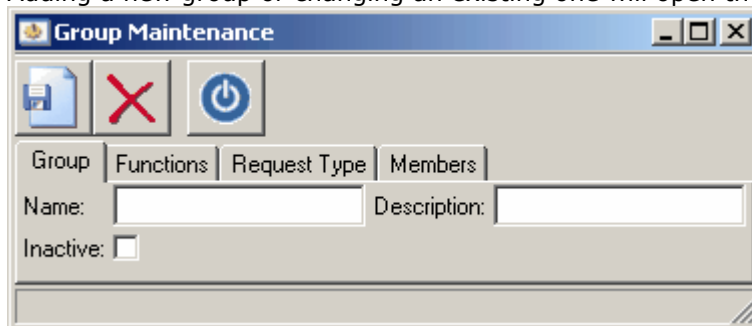
Show/Hide the search option window.



Close the Group Maintenance window. Return to BPM main screen.

To change an existing Group, highlight the Group and then double click it with the mouse to open the maintenance screen.

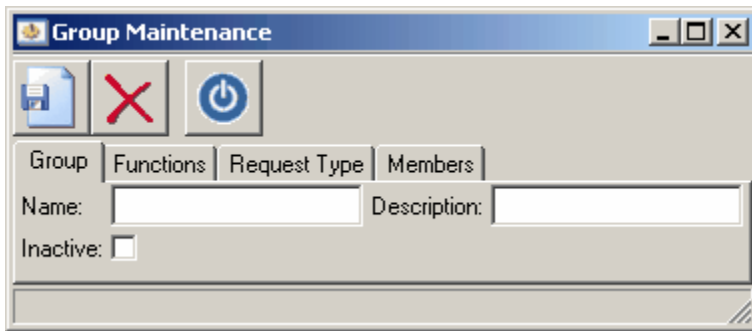
Adding a new group or changing an existing one will open the maintenance screen .



Fill in or change the information on the [Group](#), [Functions](#), [Request Type](#), or [Members](#) TABs.

5.4.2.1 Group TAB

Select the **Group** TAB on the [Add/ Change Group Maintenance screen](#).



To Add a new Group enter the new name and a description for the Group.

5.4.2.2 Function TAB

Select the **Function** TAB on the [Add/ Change Group Maintenance screen](#).

This TAB is used to edit which functions the group is allowed to complete.

For example, if **maintain_request_type** is added as a permission, all members of the group will be able to access the [Maintain Request Type](#) menu option and make changes to the database's request types.

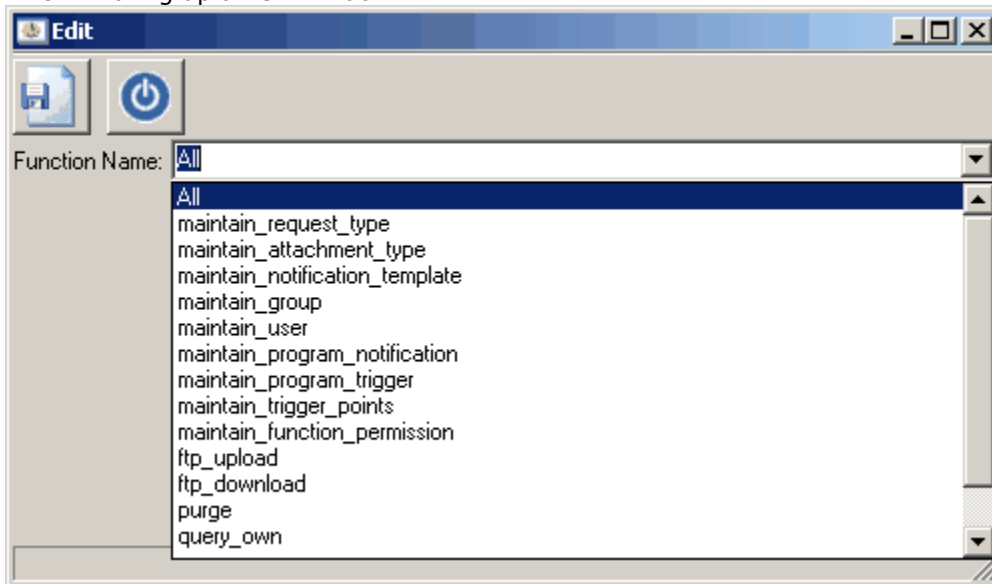


Click the **Add new record** button to add a new function to the Group or



Select a function and click the **Edit** button to change the function.

This will bring up a new window:



Select the Function from the drop down window.

When the selection is made click the **Save & Exit** button.

5.4.2.3 Request Type TAB

Select the **Request Type** TAB on the [Add/ Change Group Maintenance screen](#). This TAB is used to give the selected group permission to respond to certain request types in certain ways.

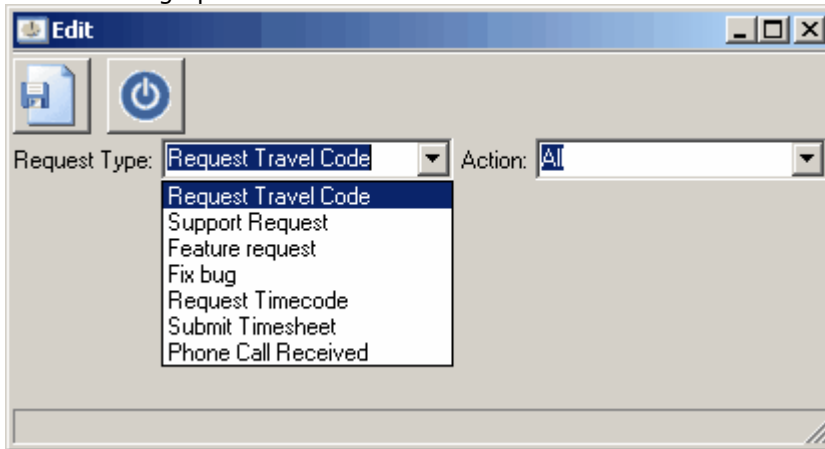


Click the **Add new record** button to add request type permissions to the Group



Click the **Edit** button to change request types permissions.

This will bring up a new window:



Select a **Request Type** from the drop down box.

If the desired request type is not available, see [Maintain Request Type](#) to add a new request type.

Select an **Action** from the drop down box.

This will allow the selected group to respond to this request type with this action.

For example, if a permission is **not** set up to allow a group to reject a certain request type, then if a user in that group attempts to reject a request of that type, he will receive an error message, and the rejection will not be completed.

To allow a group to perform all actions on this request type, select **All** in the **Action** drop-down box.

When the selection is made, click the **Save & Exit** button.

Multiple permissions can be added to a group. Click the **Add new record** button to add another new request type permission.

These permissions can also be changed or updated through the Maintain Request Type menu option (see Maintain Request Type: [Permission TAB](#)).

5.4.2.4 Members TAB

Select the **Members** TAB on the [Add/ Change Group Maintenance screen](#).



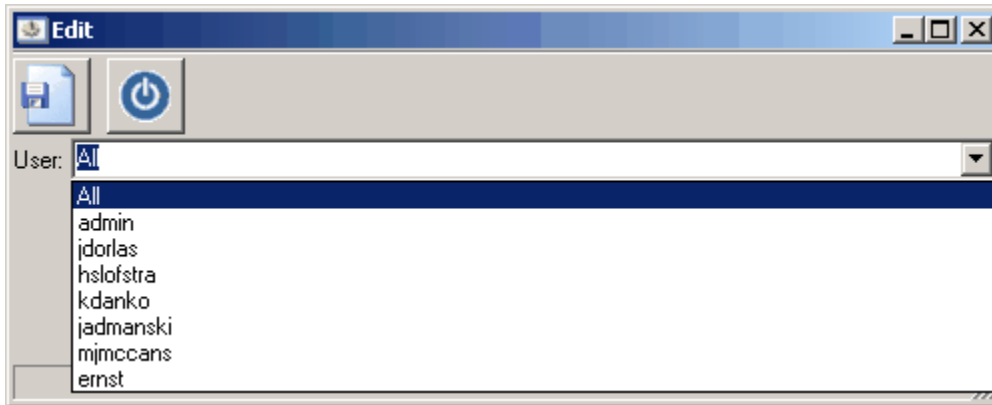
Click the **Add new record** button to add members to the group or



Select an existing user, and press the **Edit** button to change the group member to a

different user

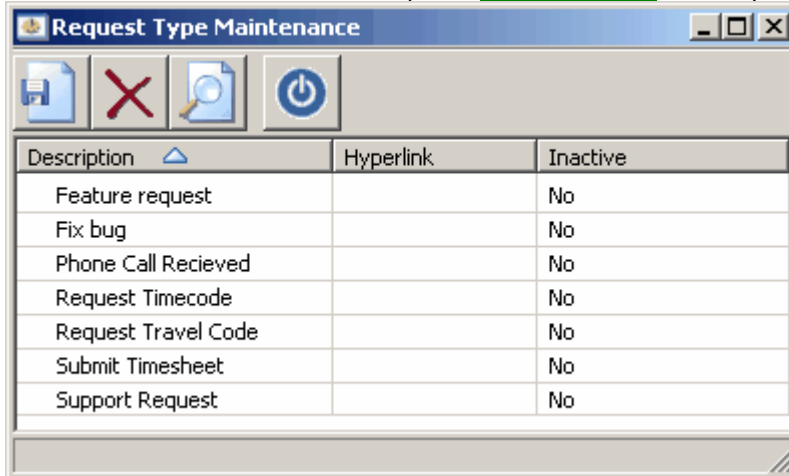
This will bring up a new window:



Select the new user from the drop down window. When the selection is made, click the **Save & Exit** button.

5.4.3 Maintain Request Type

With this screen a user can set up the [request types](#) of the system.



[Create a new Request Type.](#)



Delete a selected Request Type from the database.



Show/Hide the search option window.



Close the Request Type Maintenance window. Return to [BPM main screen](#).

5.4.3.1 Add New Request Type

The screenshot shows the 'Request Type Maintenance' window with the 'Request Type' tab selected. The window contains the following elements:

- Buttons: Document icon, Red X, Power icon.
- Tabs: Request Type (selected), Permissions, Mandatory Attachments, Next Step, Notification.
- Fields: Description (text input), Hyperlink (text input).
- Checkbox: Inactive (unchecked).

Enter the **Description** for the new Request type.

5.4.3.2 Permissions TAB

Clicking the **Permissions** TAB will allow the user to add or change permissions.

The screenshot shows the 'Request Type Maintenance' window with the 'Permissions' tab selected. The window contains the following elements:

- Buttons: Document icon, Red X, Power icon.
- Tabs: Request Type, Permissions (selected), Mandatory Attachments, Next Step, Notification.
- Table:

Group	Action
- Buttons (right side): Document icon, Power icon, Red X.

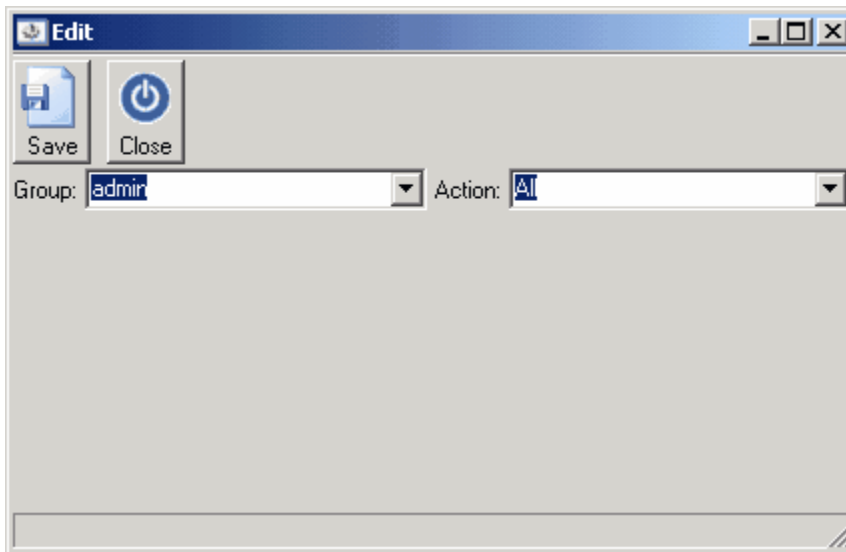
Permissions are set up on a request type to allow certain groups to respond to requests of that type in certain ways.



Click the **Add new record** button to add new Permissions or



Click the **Edit** button to change existing Permissions.



Select a **Group** from the drop down box.
If the desired group is not available, see [Maintain Group](#) to add a new group.

Select an **Action** from the drop down box.
This will allow the selected group to respond to this request type with this action.
For example, if a permission is **not** set up to allow a group to reject a certain request type, then if a user in that group attempts to reject a request of that type, he will receive an error message, and the rejection will not be completed.

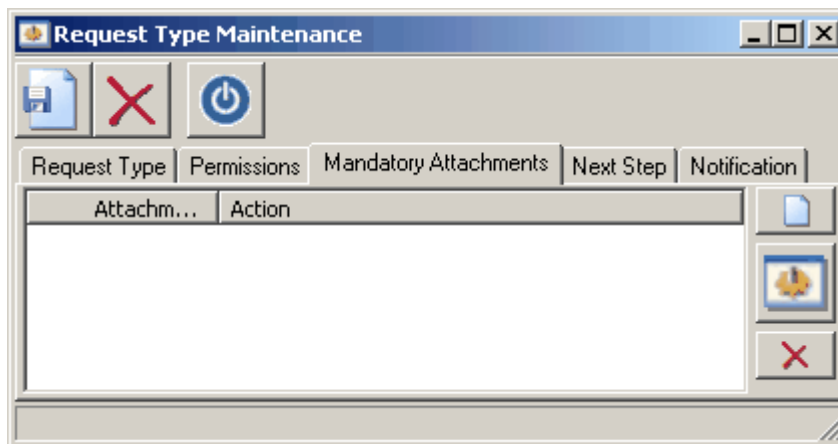
To allow a group to perform all actions on this request type, select **All** in the **Action** drop-down box.

Multiple permissions can be added to a request type. Press **Save** to add the new permission and return to the Request Type Maintenance screen. Then press the **Add new record** button again to add another new permission.

These permissions can also be changed or updated through the Maintain Group menu option (see Maintain Group: [Request Type TAB](#)).

5.4.3.3 Mandatory Attachments TAB

Clicking the **Mandatory Attachments** TAB will allow the user to add or change what attachments must be attached either to the request or to the request response before one or the other is sent.

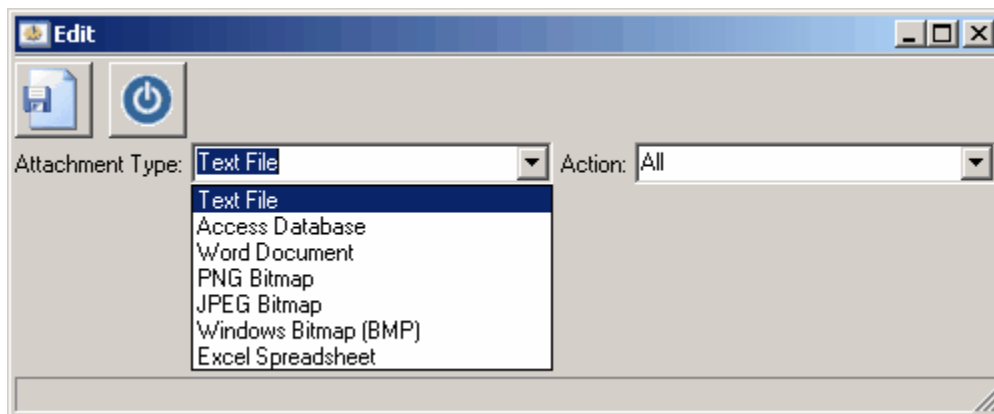


Click the **Add new record** button to add attachments or



Click the **Edit** button to change existing attachments.

This will open a new window:



Select the appropriate **Attachment Type** from the drop down window.

If the desired attachment type is not available, see [Maintain Attachment Type](#) to add a new type.

Select the appropriate **Action** from the drop down window.

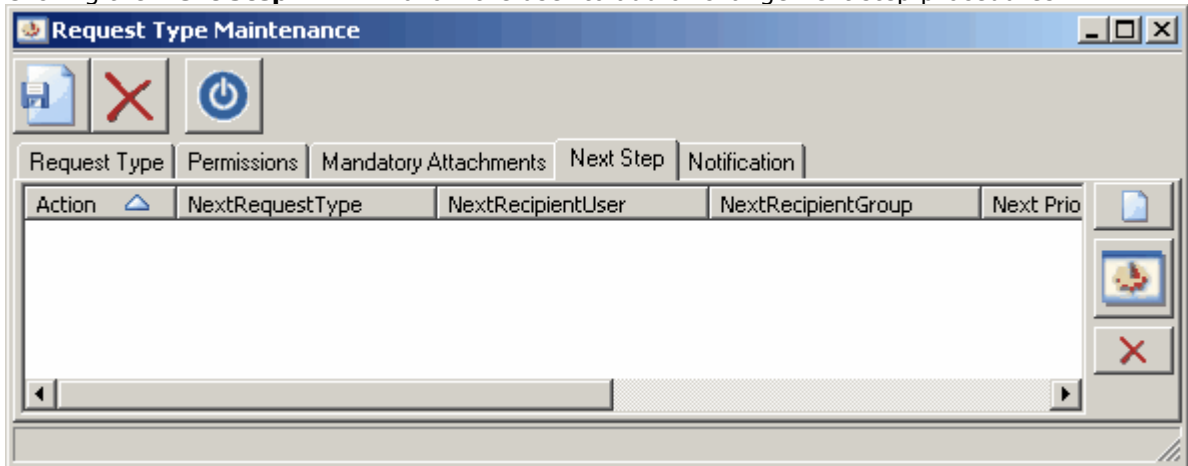
If the attachment must be attached to the request before it is sent, select **Request** as the action.

If the attachment must be attached to a specific type of request response, such as **Complete** or **Reject**, select that response as the action.

Click the **Save & Exit** button.

5.4.3.4 Next Step TAB

Clicking the **Next Step** TAB will allow the user to add or change next step procedures.



A [next step](#) is a request that is sent automatically following the completion (or rejection or delegation) of the prior request.

Use this TAB to add next steps that will automatically be added to any request of this type.



Click the **Add new record** button to add new steps or



Click the **Edit** button to change existing steps.

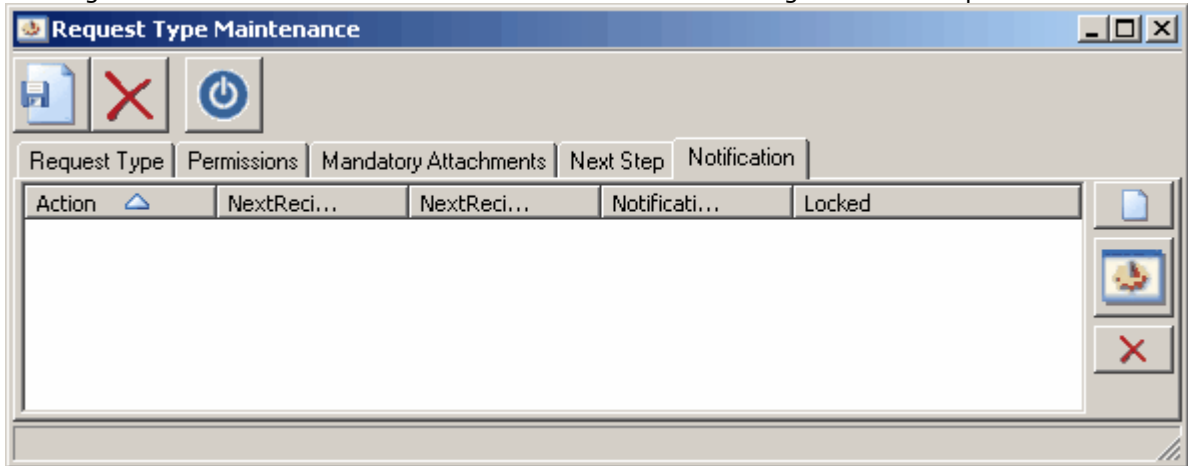
This will open a new window:

Select the desired information from each of the drop down windows, and fill in the **Next Subject** and **Next Body** (see New Request: [Next Step TAB](#) for more information).

Click the **Save & Exit** button.

5.4.3.5 Notification TAB

Clicking the **Notification** TAB will allow the user to add or change notification procedures.



A notification is a message that is sent out automatically to a specific user or group once a request has been completed (or rejected or delegated), or when a certain type of request has been sent out.

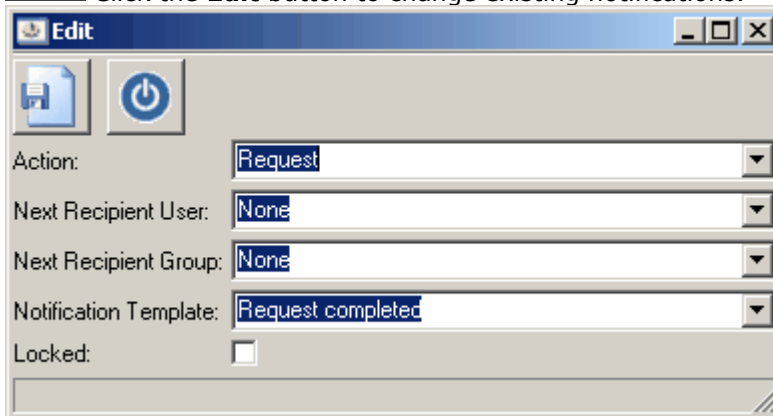
Use this TAB to add notifications that will be added automatically to any request of this type.



Click the **Add new record** button to add new notifications or



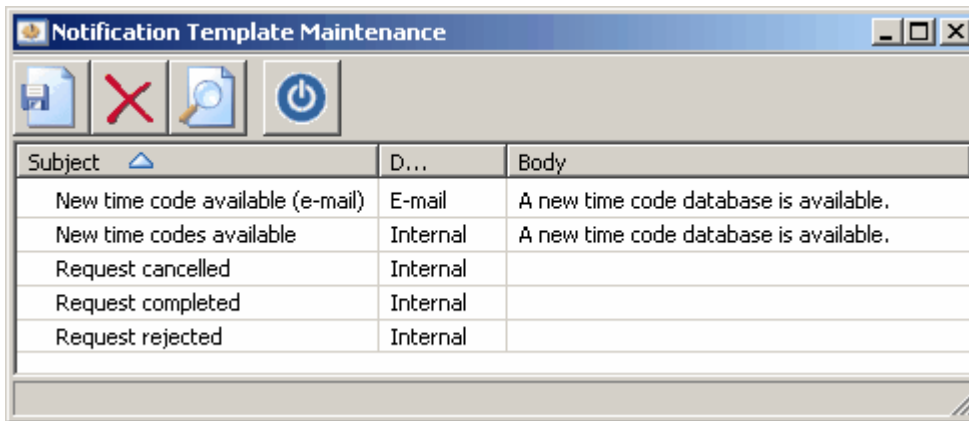
Click the **Edit** button to change existing notifications.



Select the desired information from each of the drop down windows (see New Request: [Notify TAB](#) for more information).

5.4.4 Maintain Notification Template

With this screen a user can add or change Notification Templates. A Notification Template can be used when adding notifications to a request (see New Request: [Notify TAB](#)) or to a request type (see Maintain Request Type: [Notification TAB](#)).



Subject	D...	Body
New time code available (e-mail)	E-mail	A new time code database is available.
New time codes available	Internal	A new time code database is available.
Request cancelled	Internal	
Request completed	Internal	
Request rejected	Internal	



Create a [new Notification Template](#).



Delete a selected Notification Template from the database.



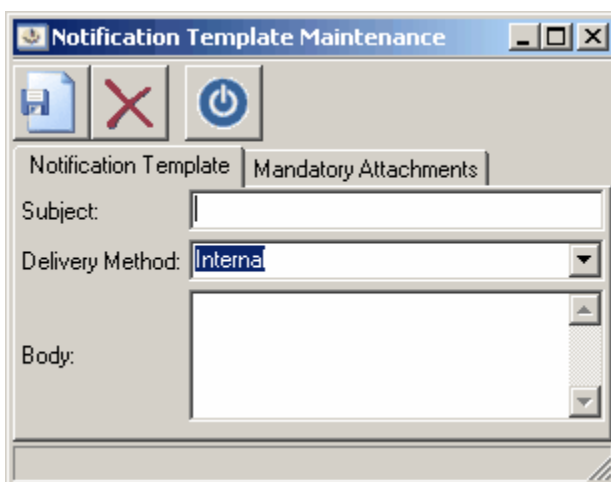
Show/Hide the search option window.



Close the Notification Template Maintenance option. Return to BPM main screen.

To change an existing **Notification Template** select it from the window and double click it to open the maintenance screen.

5.4.4.1 New Notification Template

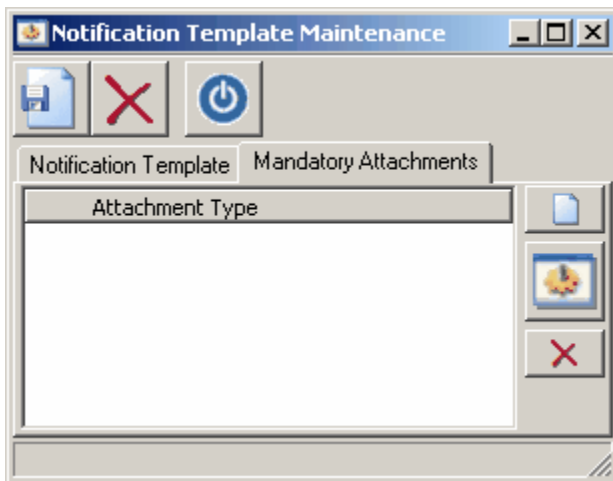


Notification Template Maintenance window showing the edit form. The window has two tabs: "Notification Template" (selected) and "Mandatory Attachments". The form contains the following fields:

- Subject:
- Delivery Method:
- Body:

Enter the **Subject**, **Delivery Method** and the **Body** for the new template. If any Mandatory Attachments are required, select the [Mandatory Attachments TAB](#).

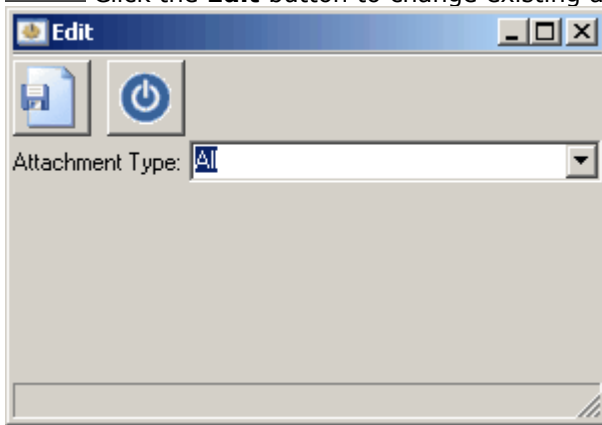
5.4.4.2 Mandatory Attachments TAB



Click the **Add new record** button to add attachments or



Click the **Edit** button to change existing attachments.



Select the appropriate **Attachment Type** from the drop down window.

If the desired attachment type is not available, see [Maintain Attachment Type](#) to add a new type.

Click the **Save & Exit** button.

5.4.5 Maintain Attachment Type

Description	Ca...	E...	Hyperlink (View)	Hyperlink (Edit)	Inactive
Access Database	Yes	.mdb			No
Excel Spreadsheet	Yes	.xls			No
JPEG Bitmap	Yes	.jpg			No
PNG Bitmap	Yes	.png			No
Text File	Yes	.txt			No
Windows Bitmap (...)	Yes	.bmp			No
Word Document	Yes	.doc			No



Create a [new Attachment Type](#).



Delete a selected Attachment Type from the database.



Show/Hide the search option window.



Close the Attachment Type Maintenance option. Return to BPM main screen.

To change an existing **Attachment Type**, select it from the window and double click it to open the maintenance screen.

5.4.5.1 New Attachment Type

Description: Enter a short description of the attachment type.

Extension: Enter the attachment type extension (ex. .gif, .xls, .doc).

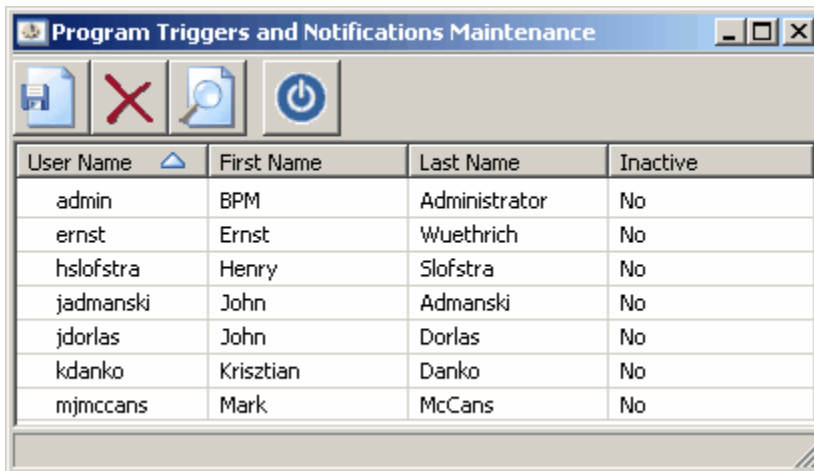
Hyperlinks: If the attachment is a link to another program, enter the link in the **Hyperlink (Edit)** field or the **Hyperlink (View)** field.

Can Upload: Select this box if the attachment is a document to be uploaded. For example, a file with an extension can be uploaded, but if the attachment is simply a link to another program, it cannot be uploaded.

Inactive: If the **Inactive** box is checked, the attachment type cannot be used.

5.4.6 Maintain Program Triggers and Notifications

Requests and Notifications can be sent not only by users, but by external programs. Use this menu option to set up Triggers that external programs will act upon.



User Name	First Name	Last Name	Inactive
admin	BPM	Administrator	No
ernst	Ernst	Wuethrich	No
hslofstra	Henry	Slofstra	No
jadmanski	John	Admanski	No
jdorlas	John	Dorlas	No
kdanko	Krisztian	Danko	No
mjmccans	Mark	McCans	No



Create a [new program trigger](#).



Delete a selected program trigger from the database.



Show/Hide the search option window.

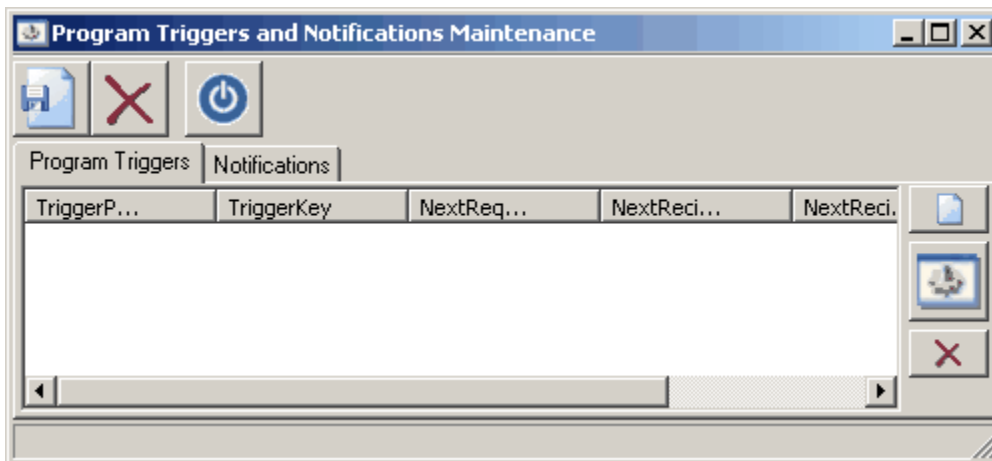


Close the Program Triggers and Notifications Maintenance window. Return to BPM main screen.

To change an existing **Program Trigger** select it from the window and double click it to open the maintenance screen.

5.4.6.1 New Program Triggers

Use this TAB to add program triggers that will allow the programs to trigger requests.



The screenshot shows the 'Program Triggers and Notifications Maintenance' window with the 'Program Triggers' tab selected. The window contains a table with the following columns: TriggerP..., TriggerKey, NextReq..., NextReci..., and NextReci... The table is currently empty. On the right side of the window, there are three icons: a document with a plus sign, a document with a magnifying glass, and a power button.



Click the **Add new record** button to add new Program Triggers or



Click the **Edit** button to change existing Program Triggers.

Select from the drop down window the **Next Request Type, Next Recipient Group, Next Recipient User** and click the **Draft** checkbox if this is for a draft.

5.4.6.2 Program Trigger Notifications TAB

Use this TAB to add program triggers that will allow the programs to trigger notifications.



Click the **Add new record** button to add new Program Trigger Notifications or



Click the **Edit** button to change existing Program Trigger Notifications.

Save Close

Trigger Point: Trigger Key:

Next Recipient User: Next Recipient Group:

Notification Template:

Index

- A -

API 3
application software integration 5
attachments 3, 4, 5
 mandatory 5
 optional 5

- B -

basic capabilities 3
BPM 3
business process 3, 5

- C -

capabilities 3
chains 5

- D -

delivery 6
 e-mail 6
 fax 6
 internal 6
 Pipex 6
 text message to cellular phone 6
delivery methods 6

- E -

ERP system 3, 4, 5

- F -

features 3, 4, 5, 6
files 4

- G -

group 4

- I -

introduction 3

- N -

next step 3, 4, 5
notifications 5

- R -

request 3, 4
 cancel 3, 4
 complete 3, 4
 delegate 3, 4
 example 4
request types 3

- S -

sequence of requests 4, 5
SLAP 3

- T -

trigger points 5