

# WORKFLOW



Automate your frequently used processes to enable more efficient use of your resources

Workflow is a series of tasks that produce an outcome. Workflow functionality enhances GLOVIA G2 by enabling Glovia users to automate and thus manage business processes more efficiently and cost effectively. A major advantage of the G2 Workflow solution is it enables you to focus on those processes truly enhanced by automation.

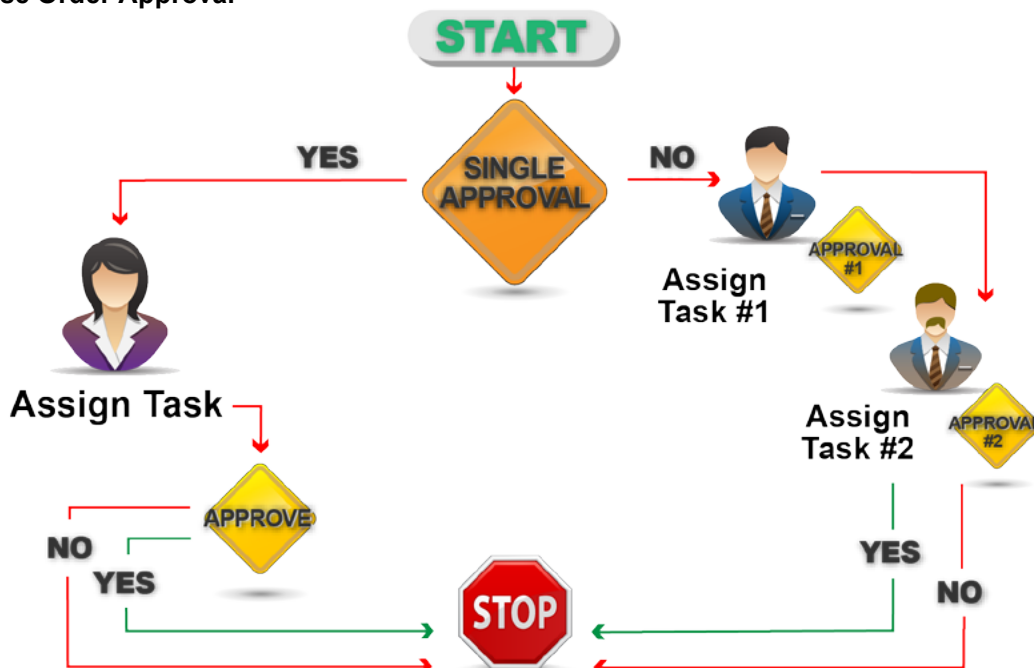
## Business Processes

Does your approval process sit in multiple in-boxes, potentially delaying the procurement of much needed items? The tasks incorporated in a business process flow can be automated to allow the system to pass the work item, in this example the Purchase Order, to the needed individual(s) for approval so the procurement is approved and the Purchase Order is placed with the correct supplier in a timely manner.

## Establishing a Workflow

Workflows are easily established by a subject matter expert user. This user understands the tasks required to execute the process, the individuals required to approve the work item, the alternate approvers in instances when the primary approver is not available, and the time that should be allotted to perform the task, in this instance, the approval.

### Purchase Order Approval



## Workflow Components

The core elements of any workflow are events, triggers, a routing and notifications.

### Events

An event is the occurrence of a specific situation or condition that affects the workflow in one of the following ways:

- Initiates or terminates a workflow process instance or instances
- Changes the state of a workflow instance, e.g., from not approved to approved
- Provides notifications, e.g., to the approver, by way of email or alerts,
- Enables a particular activity to be started, re-started or completed.

### Triggers

An event usually has a trigger, also known as a cause that initiates a particular action to be taken or response to be made. Define and Manage Triggers:

- For each event type listed above
- Scheduled by specific date/time
- In time-based intervals (a window of time from an event or from a scheduled trigger)
- Rule-based (conditional based on business rules such as quantity or price, in the instance of our example of a Purchase Order)
- Can be manually launched
- Can launch another workflow or be launched by another workflow.

### Routing

A routing reflects the order of the tasks in the workflow. Routings can:

- Support sequential paths, i.e., one approval must follow another
- Support simultaneous paths in which events and triggers may or may not be dependent, i.e., different approvals can be given simultaneously
- Be conditional such that routing paths are defined by attributes of events, e.g., an approval cannot be given without specification of the where used of the item being procured.

### Ad hoc Routing

A workflow may be managed and changed on an ad hoc basis. This capability enables:

- The ability to manually re-route, add-to, modify routing process (with specific security permissions)
- The ability to spawn a localized or sub-process workflow routing within an event or trigger
- Support of manual intervention of a routing for

which a user manages the trigger or event, rather than allowing the workflow engine to route it.

### Notifications

Workflow notifications can be created to:

- Automatically notify individuals of tasks that they must perform, e.g., approve the Purchase Order
- Automatically notify the initiator, in our example, the buyer, of the work item, the Purchase Order, when task completion or outcome occurs, e.g., the approval
- Support time-based notification (time allotted for the approval)
- Record when system messages are sent and retain copies of sent messages
- Fetch data from business systems (any/all data sources) and include it in a notification message
- Honor security options for control of what type of messages can be sent by certain mechanisms
- Allow users to configure notification preferences.

### G2 Workflow Features

G2 workflow automatically creates tasks/actions, ensures consistency and increases visibility by connecting G2 users with relevant tasks and information

- G2 workflow provides extensive features set to help users create a workflow utilizing easy to use, declarative, point and click and visual workflow design.
- From a basic task routing to complex features with policies, rules, escalations and exception handling it provides an easy to use workflow engine to automate your business process
- Many out of the box business process workflows such as purchasing approval, master data creation etc. are provided as part of workflow solutions
- Built on Microsoft technologies that allow it to interact with almost any SharePoint asset including lists, documents etc.
- Provides user with a single view of assigned tasks with a G2 list that can be searched and filtered based on user defined criteria
- Allows users to redirect or delegate tasks to other users and respond to tasks using emails.

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