precurio

Workflow Module Manual

Precurio Workflows

As you must already know, workflow applications help automate processes that require series of steps usually requiring human intervention, such as an approval from various people in different units of organization.

The Precurio Workflow module gives administrators the power to create flexible workflows with key features like access management, approval sections and a dynamic form builder.

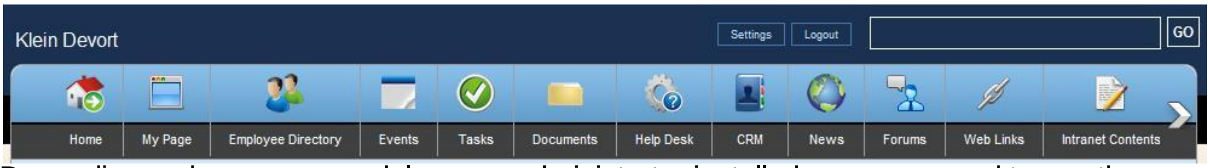
For the purpose of this manual we will be using the 14-day free cloud hosted version of Precurio to explain the Workflow module. Visit http://precurio.com/hosted-saas.php to download this free version now.

This manual assumes you already have Precurio installed and configured appropriately.

Creating Workflows

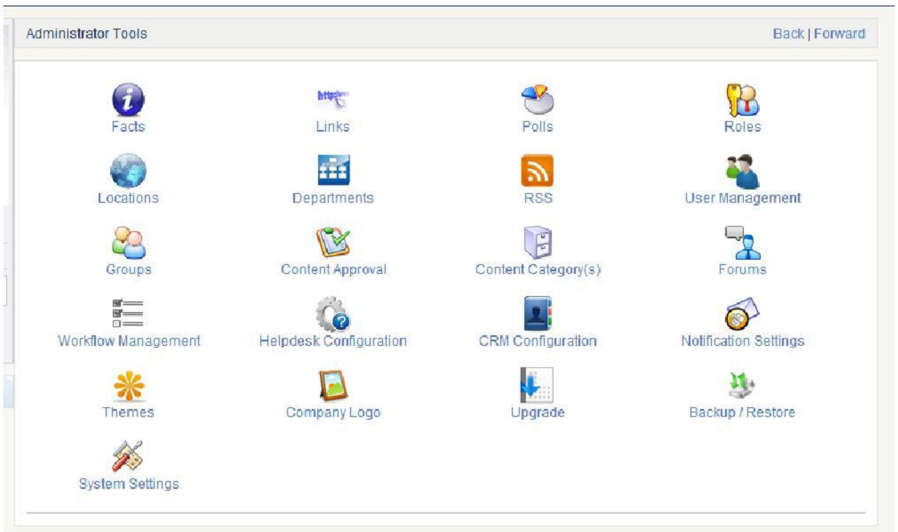
First of all, let's create a workflow.

1. Select the *Admin module* icon on the main menu bar.



Depending on how many modules your administrator installed, you may need to use the little white carousel arrow on the right to view more modules.

2. Now click on the *Workflow Management* icon.

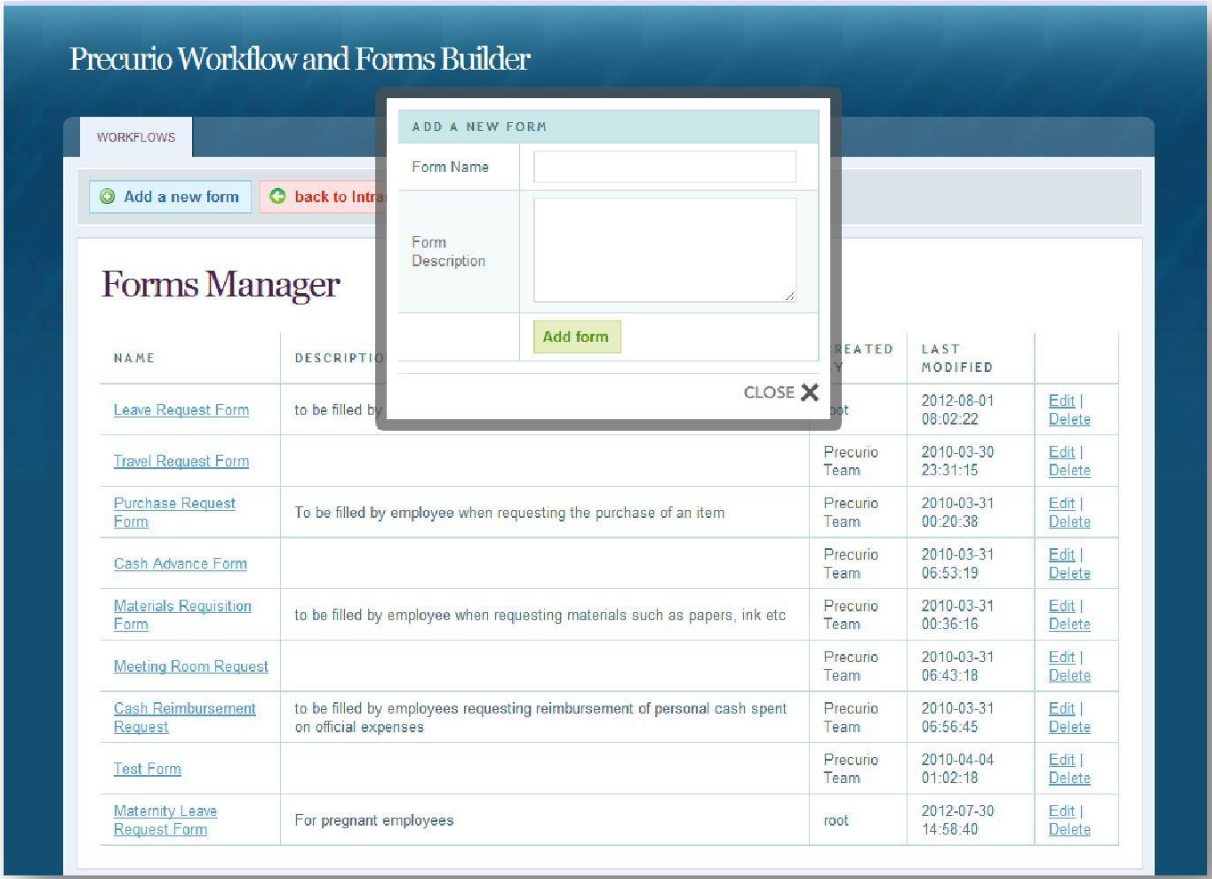


Only personnel with administrative privileges can access the *Admin module* to successfully create a workflow.

Workflow management shows a list of existing workflows with edit and delete options as well as the *Build New Workflow* button and the *Delete Selected Workflows* button which deletes any checked workflows.

3. Click the *Build New Workflow* button.

4. In the Workflow and Forms Builder, click *Add a new form* and enter your workflow name and description in the *Form name* and *Form Description* fields.



Building Workflow Forms

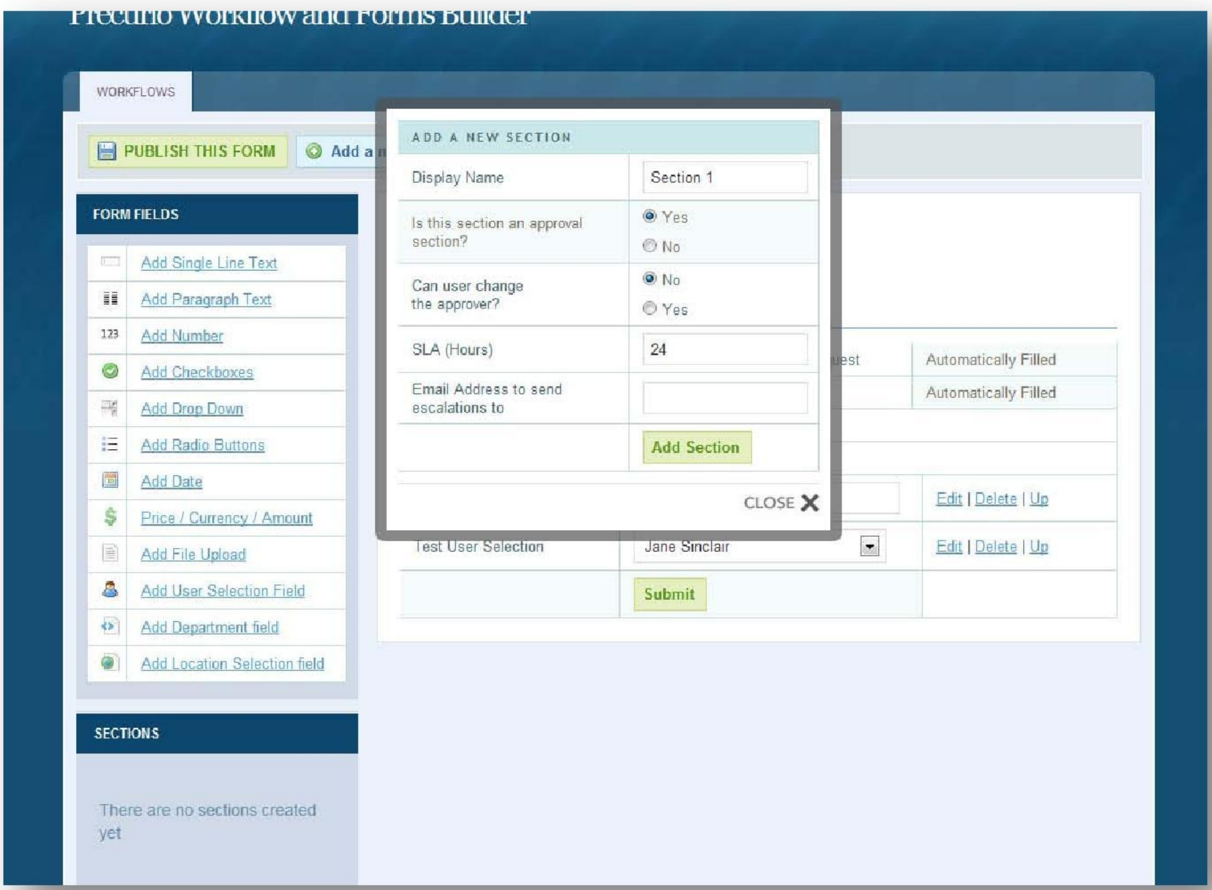
A Precurio workflow is basically made up of a workflow form with sections each representing a particular stage of the workflow process which can made accessible only to authorised personnel. Each section contains specific form fields that define personnel data to be captured.

By default each new workflow comes with a Base section containing predefined *Name*, *Job Title*, *Date of Request* and *Department* fields that automatically captures this information from the personnel using the section of the workflow.

Adding Form fields

The Workflow and Form builder comes with a menu of various form fields, each designed to facilitate capturing data in a variety of formats. These include

- Adding Single Line Text
- Add Paragraph Text
- Add Number
- Add Checkboxes
- Add Drop Down
- Add Radio Buttons
- Add Date
- Price / Currency / Amount
- Add File Upload
- Add User Selection Field
- Add Department field
- Add Location Selection Field



To add a form field to a section,

1. Click on the desired form field from the Form Field menu.
2. Provide a Field Label.
3. Specify whether or not the field must be filled.
4. Provide a default value for the field if necessary.
5. Click the *Add Field* button.

Adding Sections

As explained before *Sections* represent a level or stage in the process workflow. Aside from the default Base section that comes with every new workflow, you can create new sections with a different access privileges or for a particular group of personnel.

To create a Section,

1. Enter the name of the Section
2. Specify whether or not the section is an approval section requiring a yes or no from the acting personnel.
3. Specify whether or not the Base section user can change the approver.
4. Specify how many hours a request can stay active without being attended to.
5. Specify the email address to send escalations to
6. Click the *Add Section* button.