

Workflow engine

All entities in the system have workflow / lifecycle model attached to them. In addition all records will have a status field, indicating the records place in its workflow. Each step in a workflow is called a status, and influences how records behave in that step (status).

- What new status can be assigned from here
- What automated actions should be carried out (see below)
- What permissions do the users have in this step
- What fields should be shown or hidden
- What are the time constraints on this part of the process

Automated actions

Entering, leaving or staying in a certain status can trigger certain actions in the system.

Trigger summary

- Enter
- Leave
- Timed

Timed actions are defined as an amount of time, relative to som date fields.

“ Send an email 1 day before the date defined in the BIRTHDAY field

Execute code 7 days after this status was reached

Actions include

- Notifications
- Task creation
- Code execution (this can do anything)
- Change status
- Export data
- Delete data (GDPR compliance)

Learn more about [Status action configuration](#)

Performance measures (LEAN)

For each record in the system it is possible to measure the time spent in a status.

This can be compared to performance targets on

- The whole flow
- A single status

The targets consists of two values

- Goal
- Tolerance

“ After submitting a ticket, the service desk should optimally respond within 4 hours (goal). We can however accept if it takes 24 hours (tolerance).

We can now easily mark up records depending on their time usage

- Green: Better than goal
- Yellow: Better than tolerance, worse than goal
- Red: Worse than tolerance

This can be visualized on each record using Gauge fields, or in aggregated form via a list report.

Instructions

Setting up measures

- Entity > Advanced
 - Set checkmark in
 - Define goal and tolerance
- For each Entity > Status
 - Define goal and tolerance
 - If the status is the last part of a measured workflow check Final

Adding Gauges to an entity

- Visual extra: Visual: Target gauge Step
- Visual extra: Visual: Target gauge Total

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