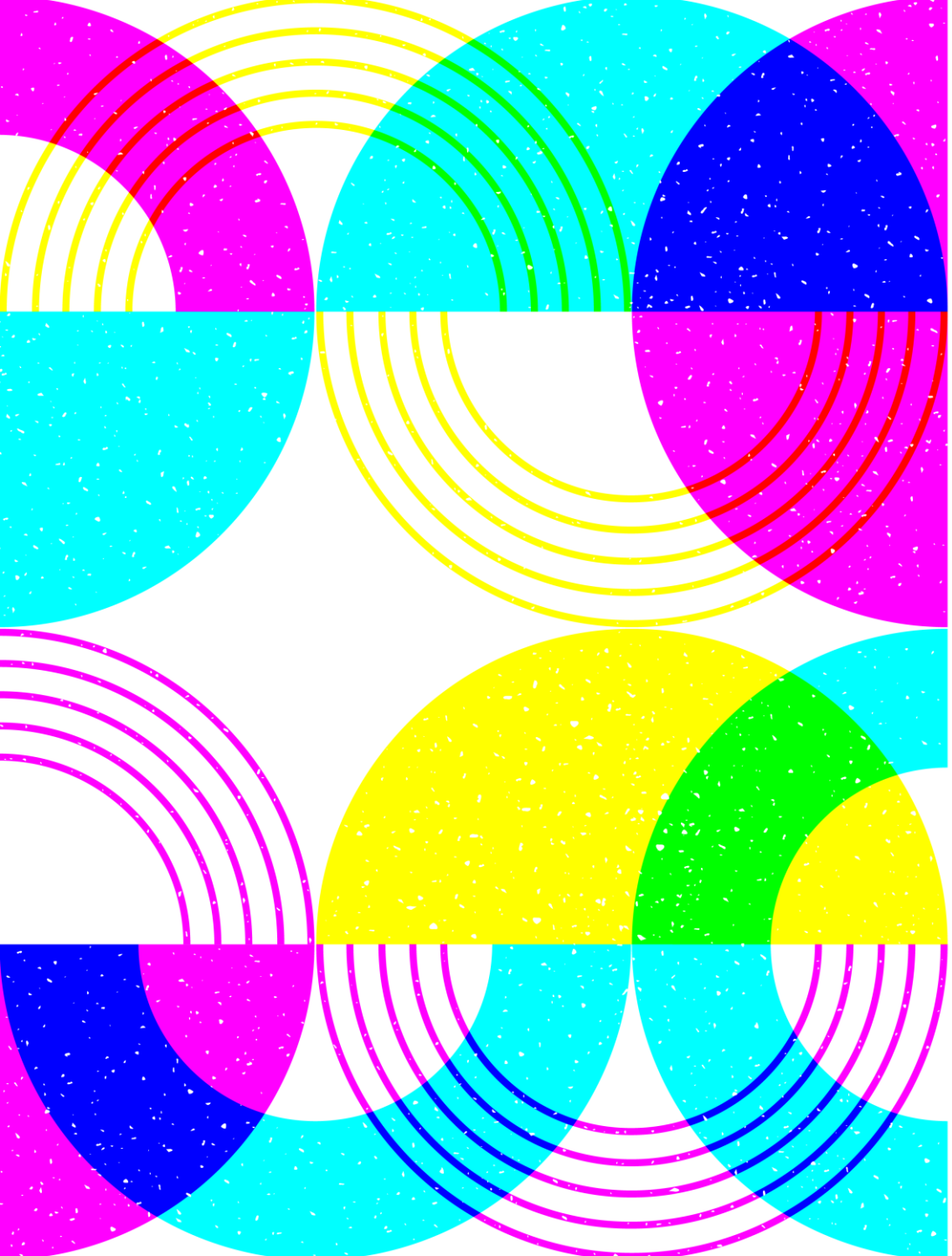


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Process Power: Streamlining SIS Tasks with Qmlativ's Process Manager

Deb Ramlow, Product Line Manager

What is Process Management?



A workflow tool that allows districts to:

- **define,**
- **assign,**
- **track, and**
- **complete**

multi-step administrative processes to improve efficiency and accountability.

Why Process Management?

* Save time * Better communication * Increased productivity

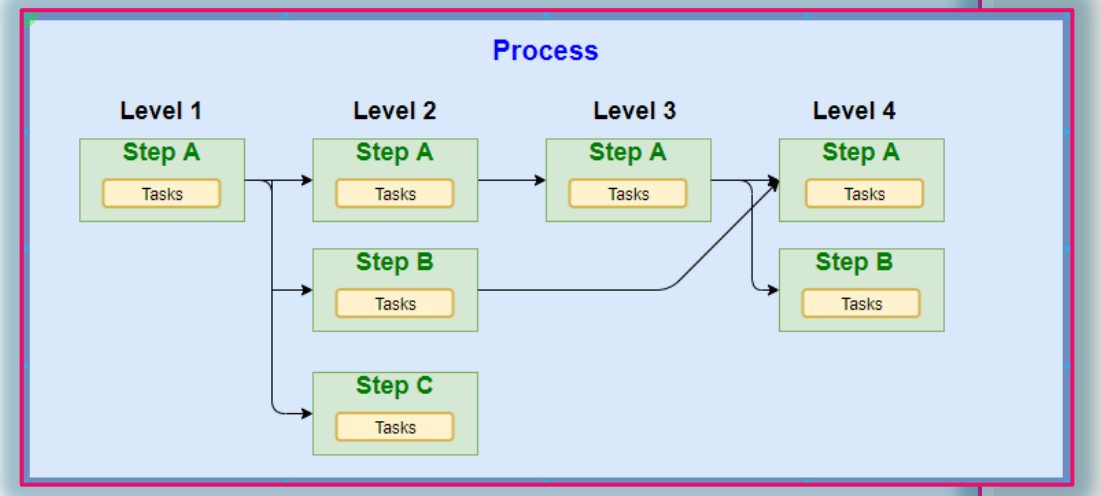


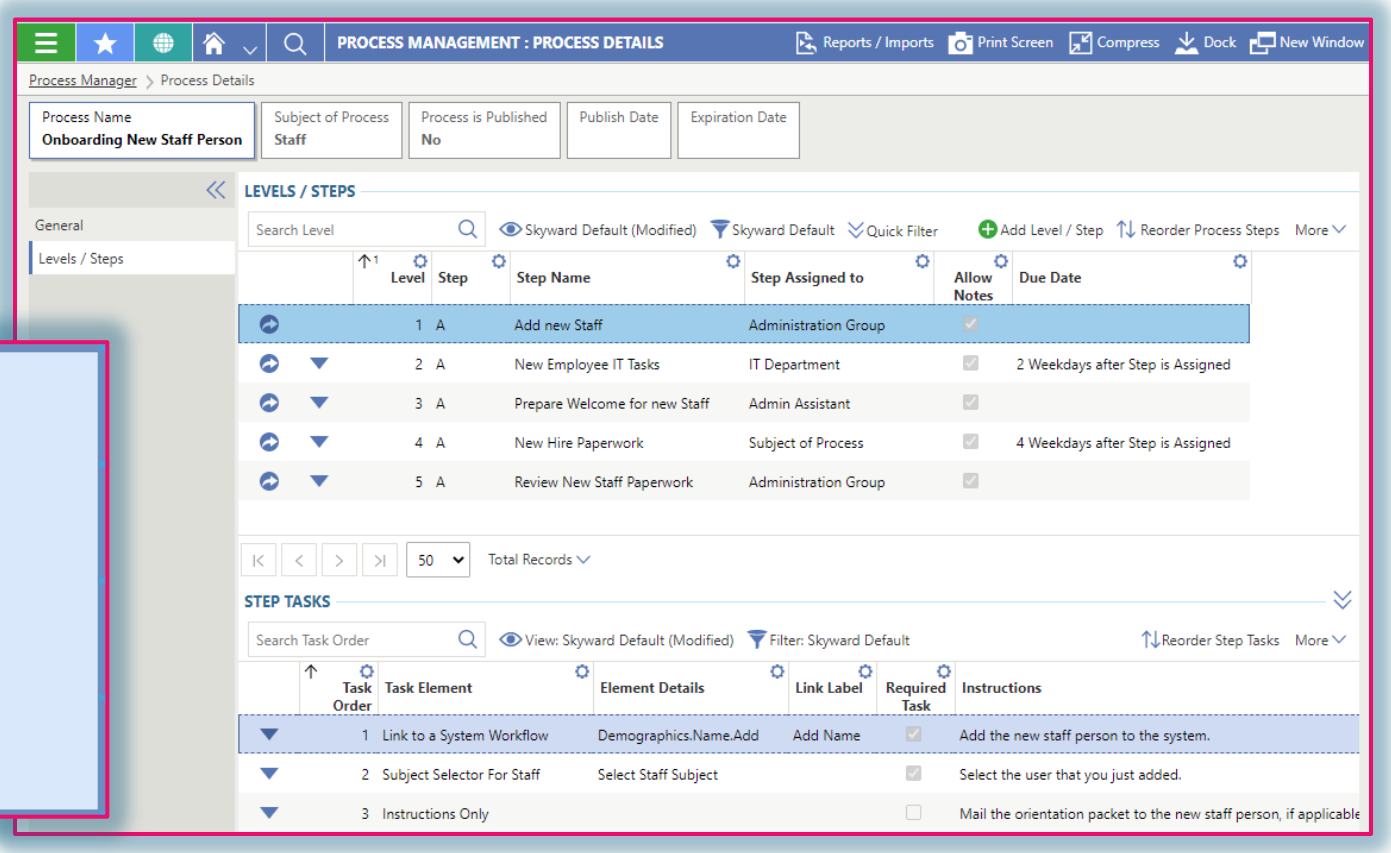
- Do you struggle to keep track of what tasks have been completed for a project?
- Is there a district process that requires a lot of manual communication?
- Do you find that steps get missed in your normal business processes?
- Do your staff question who should be doing a task and when?

Qmlativ's Process Manager can help!

Structure of a Process

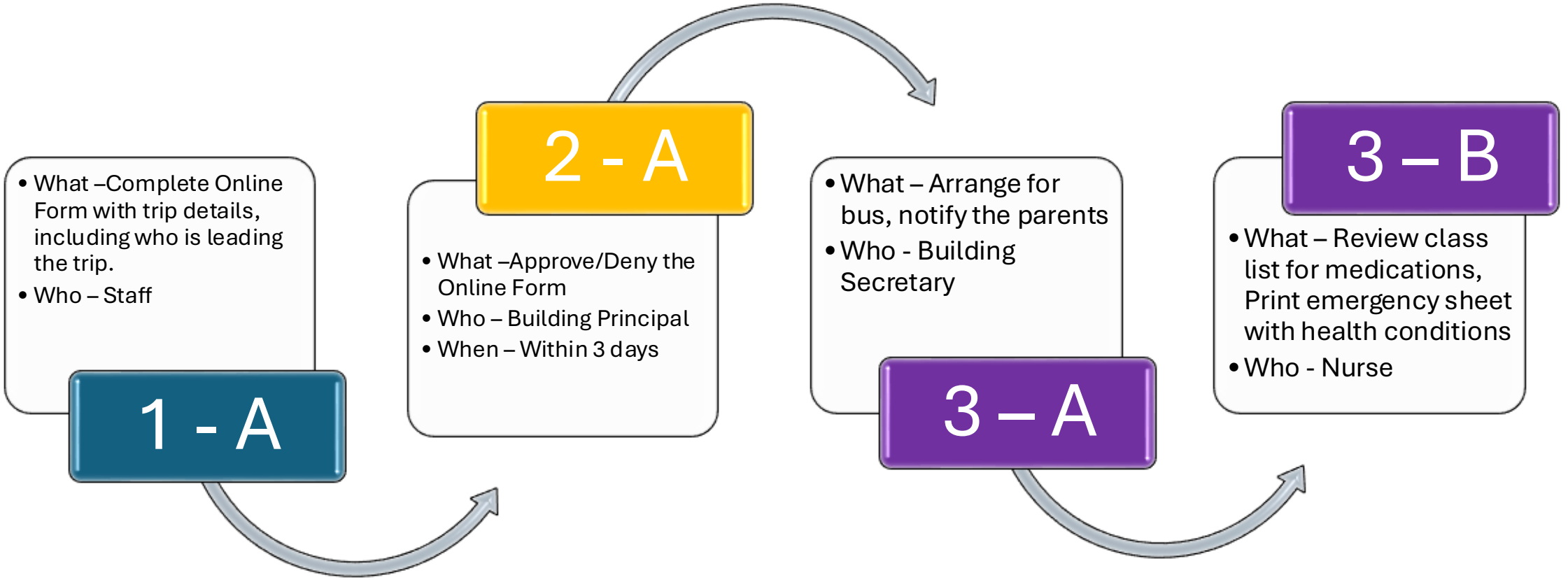
- A Process in Qmlativ is made up of Levels, Steps and Tasks.





Note: Conditional levels are a future enhancement.

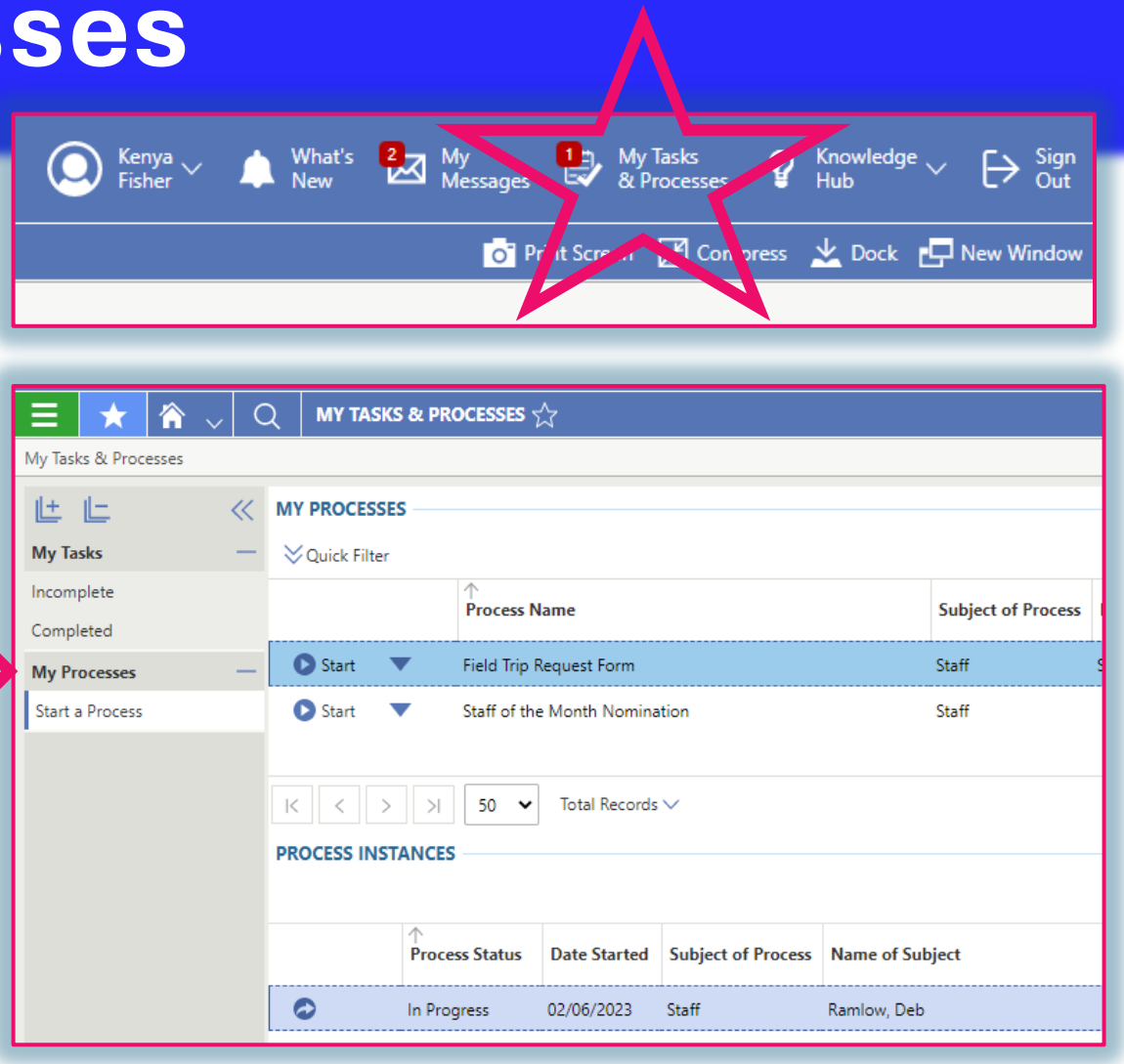
Case Study: Field Trip Request Process



My Tasks & Processes

*I am a **teacher** that is planning a field trip for my class.*

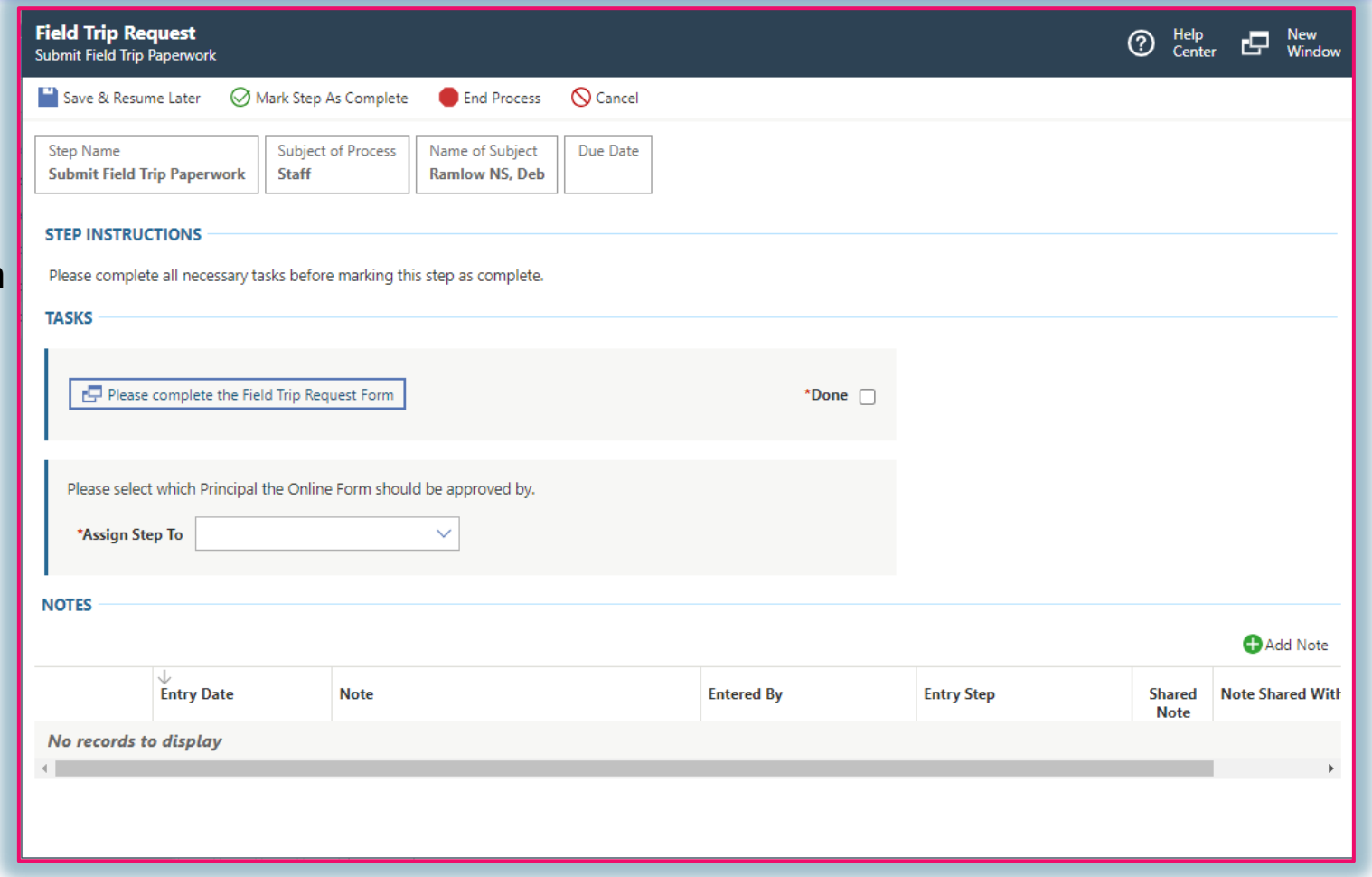
- To start the Field Trip Request process, I navigate to My Tasks & Processes in the header ribbon.
- Under My Processes, I see the Processes that I can start.
- I click Start on the Field Trip Request Form line.



Start a Process: Field Trip Paperwork

These are the tasks I need to complete to start the request process:

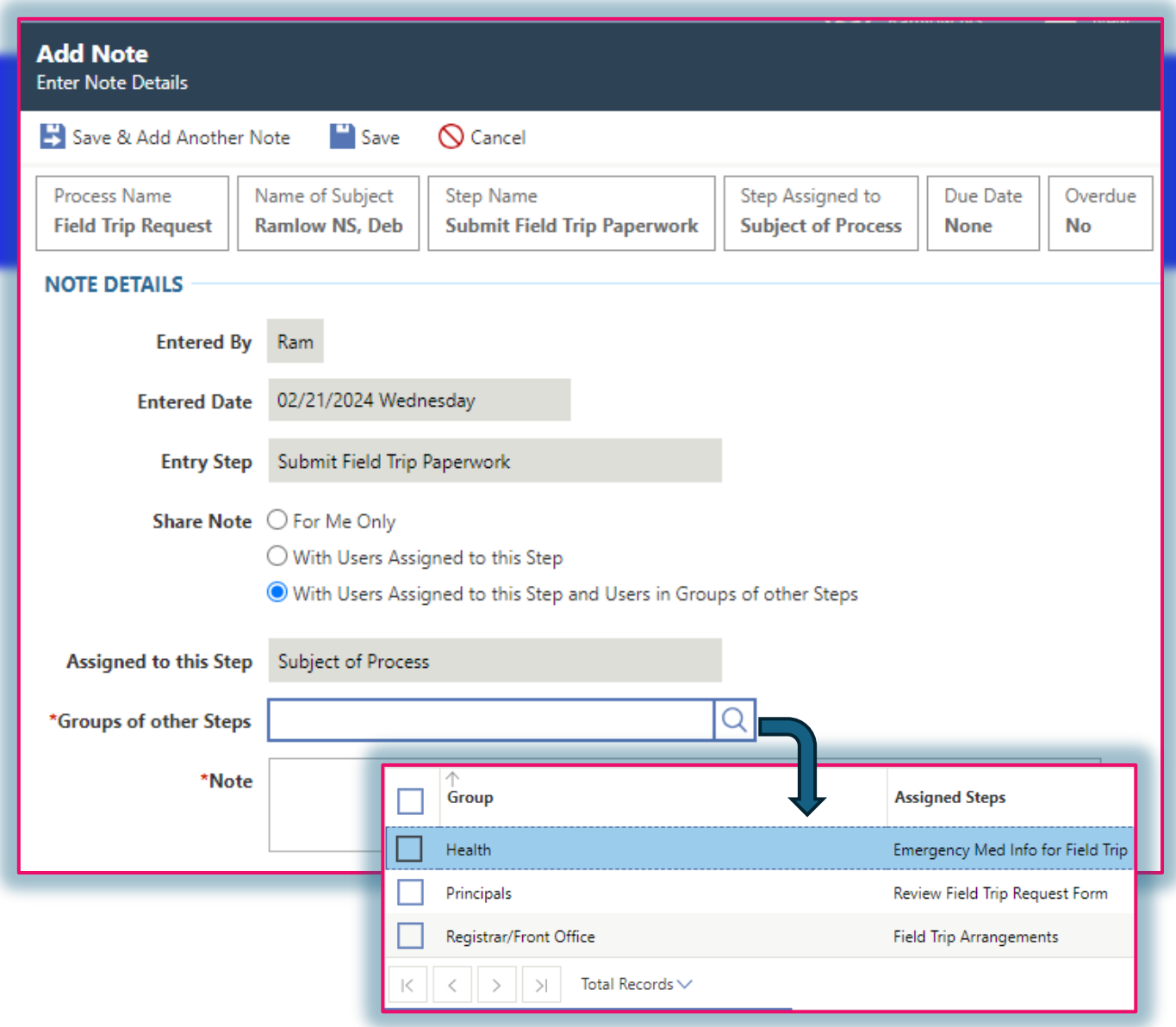
- **Task 1**
  - Link to an Online Form – launches an online form that will be used to collect information about the field trip.
- **Task 2**
  - Select a Principal that will need to review the form for approval.
- **Notes**
  - Add notes for all or select users that are participants in this process.



Adding Notes

When adding notes, I have three options for sharing the note.

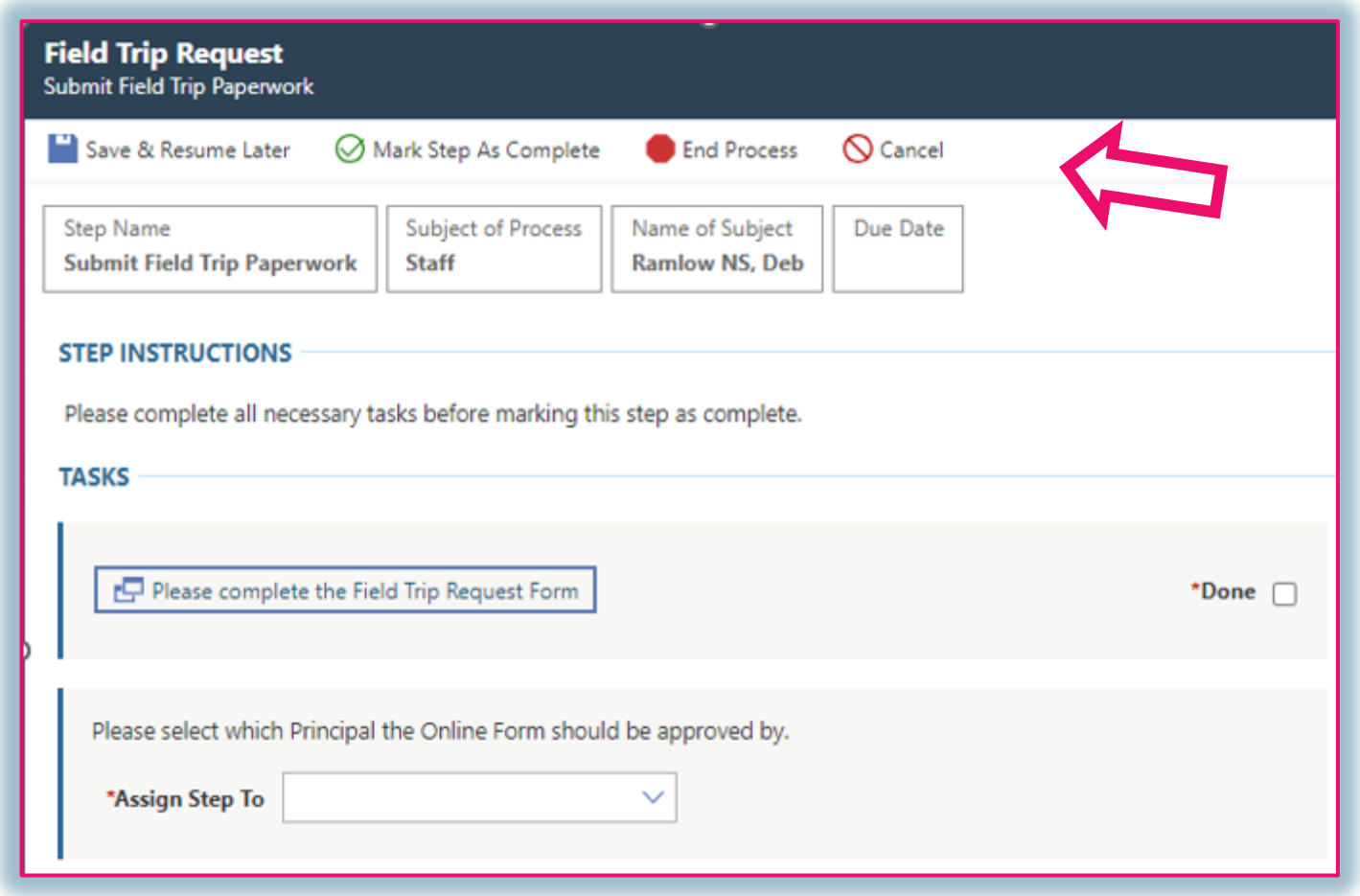
- **For Me Only**
  - Only I will be able to see the information entered.
- **With Users Assigned to this Step**
  - If a group of users is assigned to this step, everyone in that group will have access to the note.
- **With Users Assigned to this Step and Users in Groups of other Steps**
  - I can choose which other groups involved in this process to give access to the note.



Completing the Step

I must complete any tasks marked with a red asterisk before marking the step as complete. My options for next steps are:

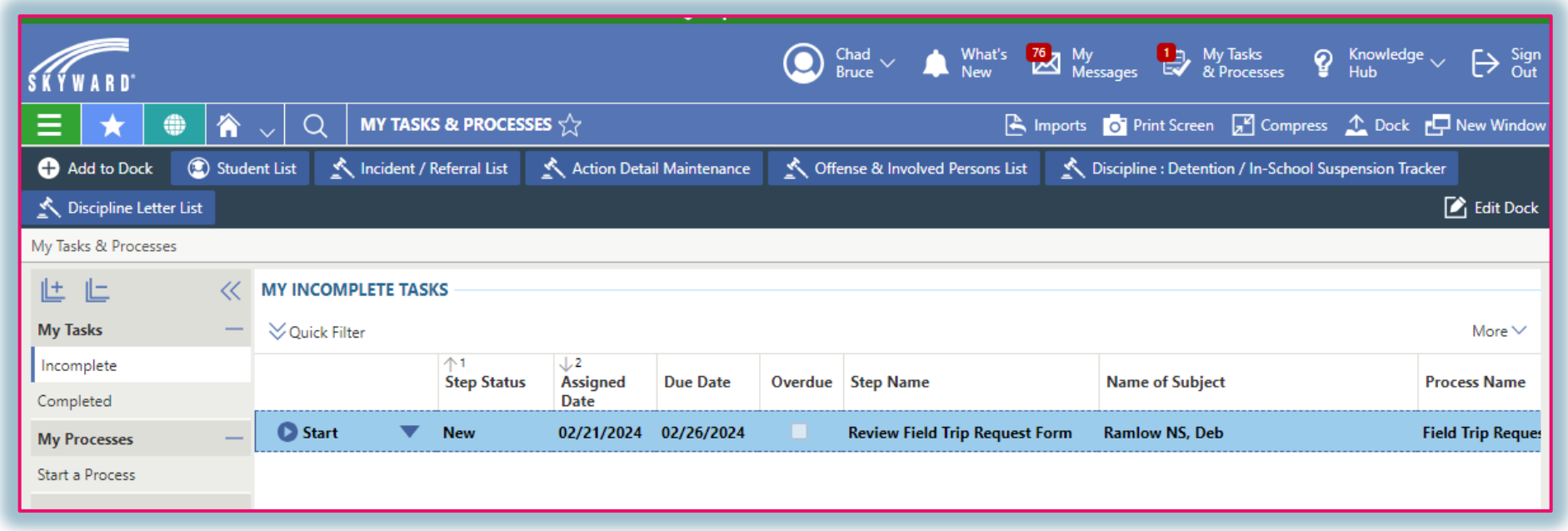
- **Save & Resume Later**
  - Allows the user to "pause" their work on this step.
- **Mark Step As Complete**
  - User indicates their portion of the process is done.
  - Once all steps at the same level are complete, the steps at the next level are activated.
- **End Process**
  - Optional button based on setup.
  - Allows user to end the entire process at this step.



Next Step: Review Field Trip Request

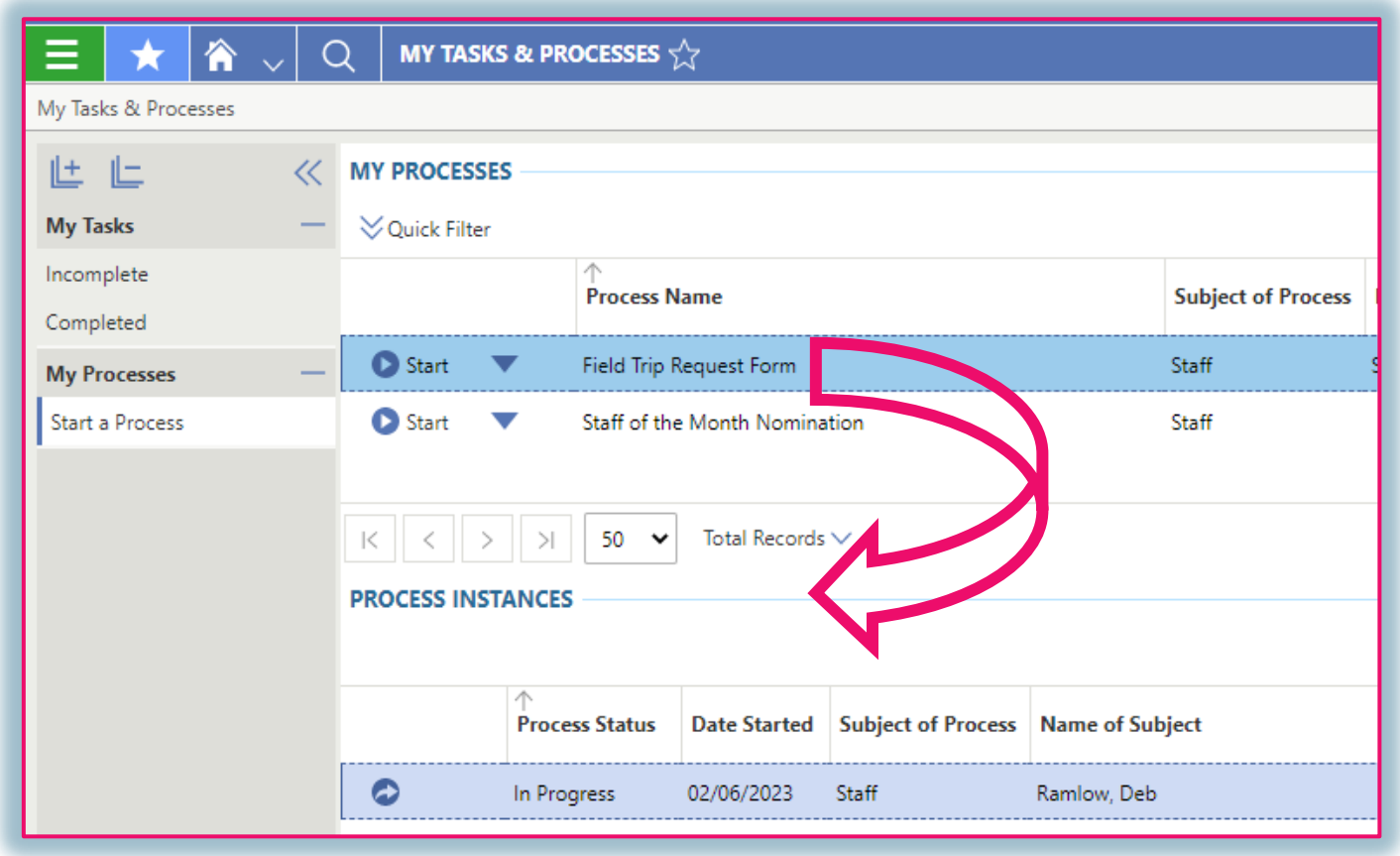
I am a principal that received a notification that a field trip request is ready for review and see an indicator by "My Tasks and Processes" that something is waiting for me.

- I click on My Tasks & Processes.
- Tasks waiting for me are listed under "My Tasks > Incomplete"
- Clicking "Start" will open the step and display the Tasks I have been assigned.



Process Instances

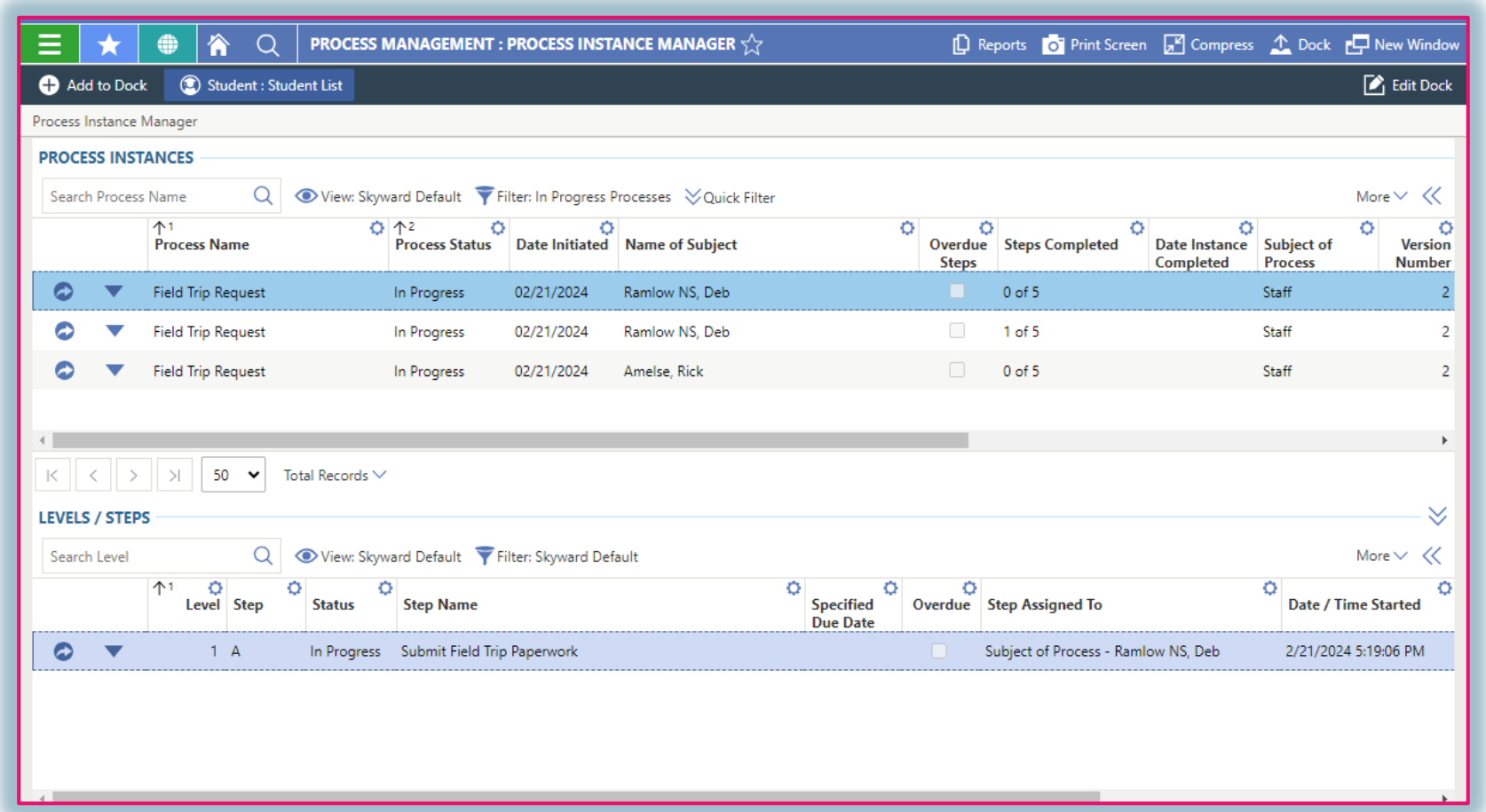
- Process Instances are individual incidents of the Process highlighted in the top list.
- Depending on how the process was set up, the records may only be instances started by the current user or they may include those started by others.
- The subject of the process instance, the process status and date started are listed for reference.



Instance Manager

I am the Field Trip Coordinator and I want to ensure field trip requests move through the process, so I am assigned as the Instance Manager for this process.

- The Instance Manager oversees the process and can step into the process on behalf of any user or group to mark tasks and steps as complete.
- Each process can have a different person or group as the Instance Manager.

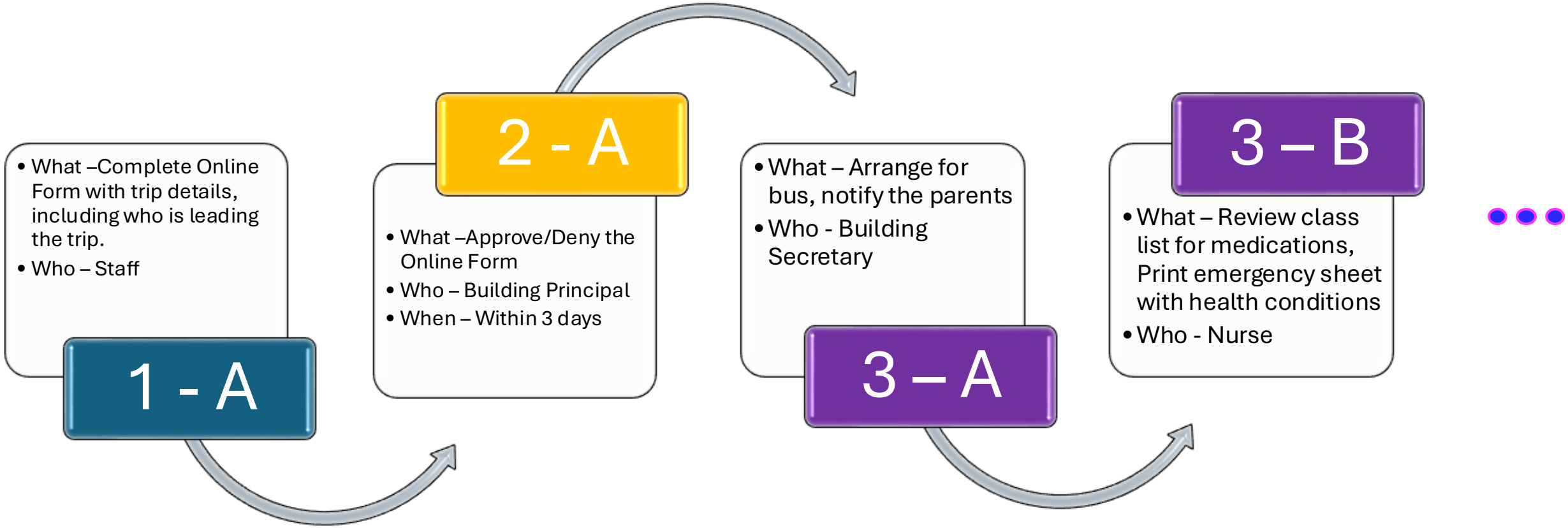


First Step when Building a Process – PLAN!

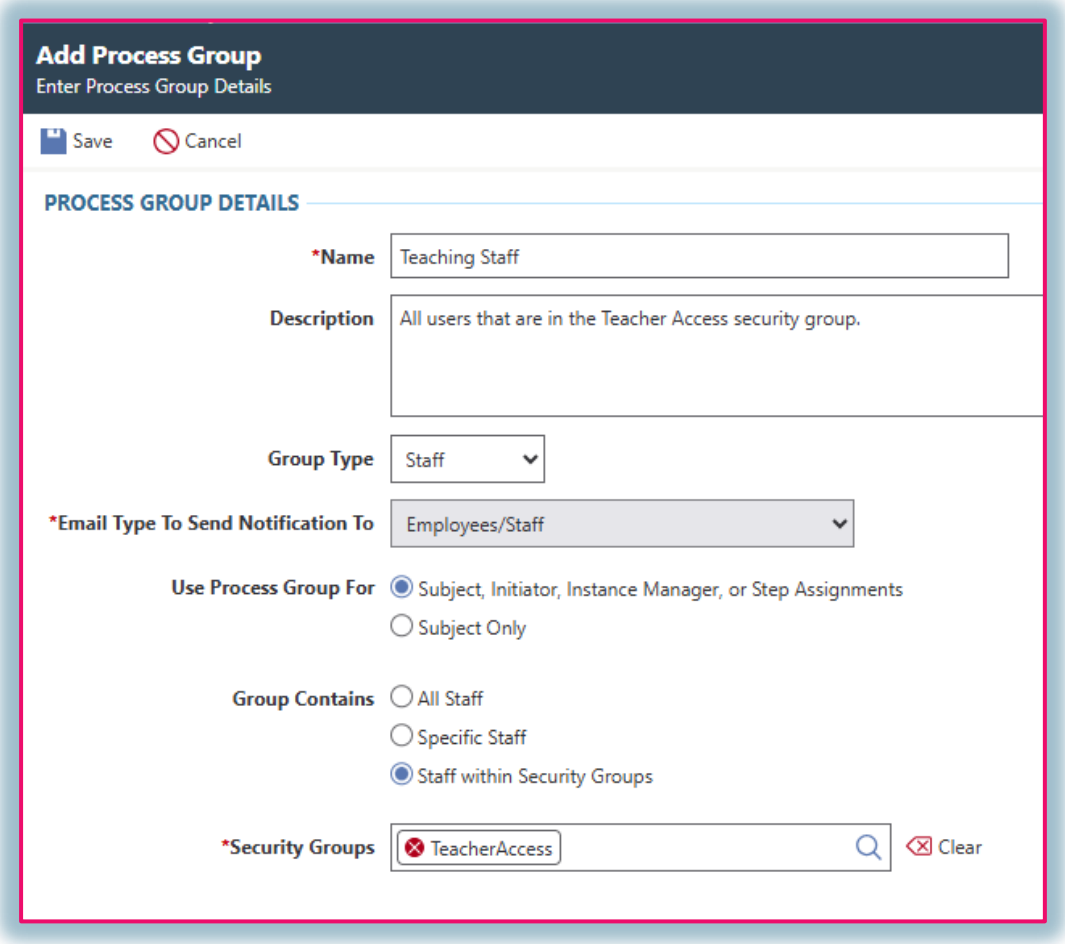
- Before starting to build a Process in Qmlativ, make a plan!
- Map out the:
  - Tasks that make up the process,
  - Order that the tasks are completed,
  - Person(s) responsible for the tasks, and
  - Due dates (if applicable)
- Create:
  - Process Groups
  - Online Forms



Planning the Field Trip Process



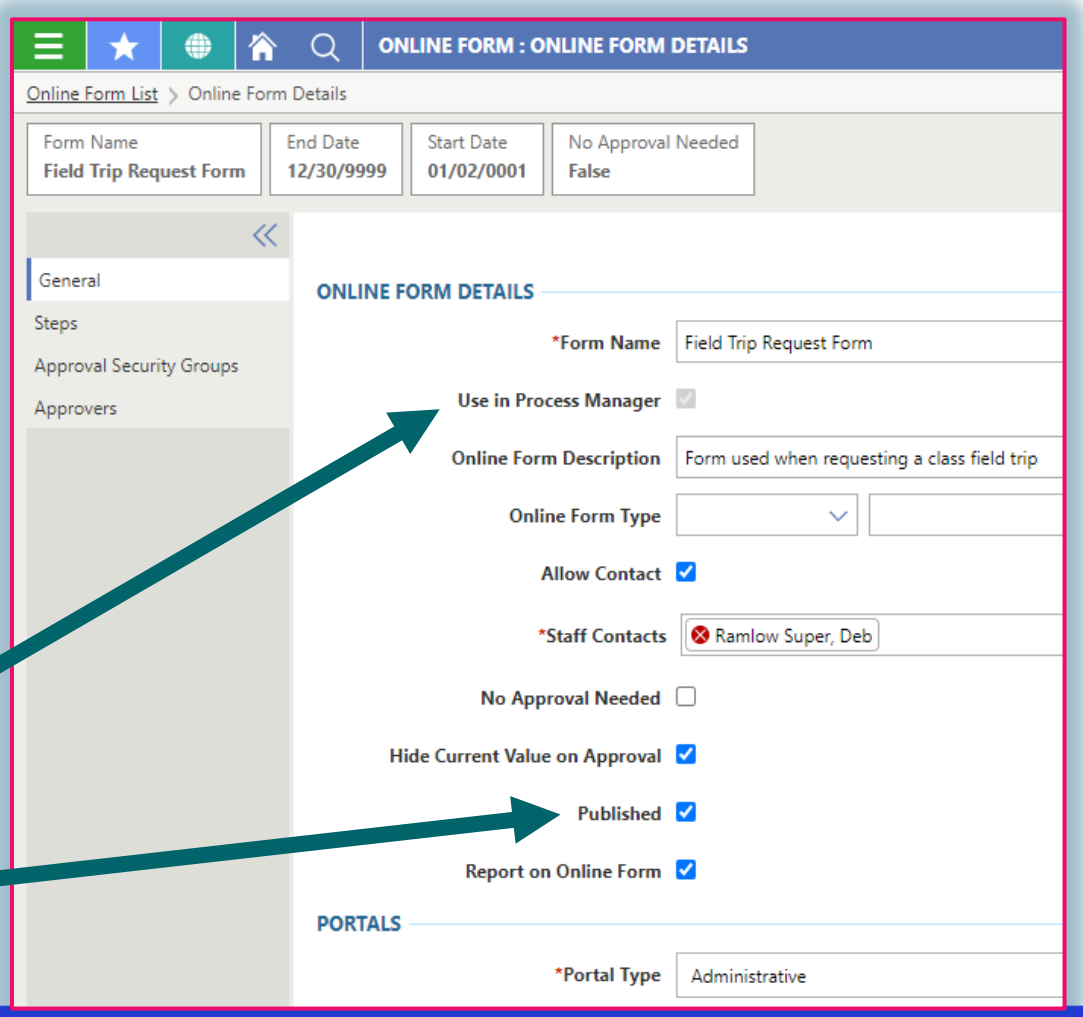
Create Process Groups



- Create groups to use in the Process
  - All users in the Group Type
  - Select individuals
  - Users in a select Security Group(s)
- Groups are used in these Process areas:
  - Subject of Process
  - Initiator of Process
  - Manager of Process Instances
  - Step Assigned To
- Using Groups makes maintenance easier!

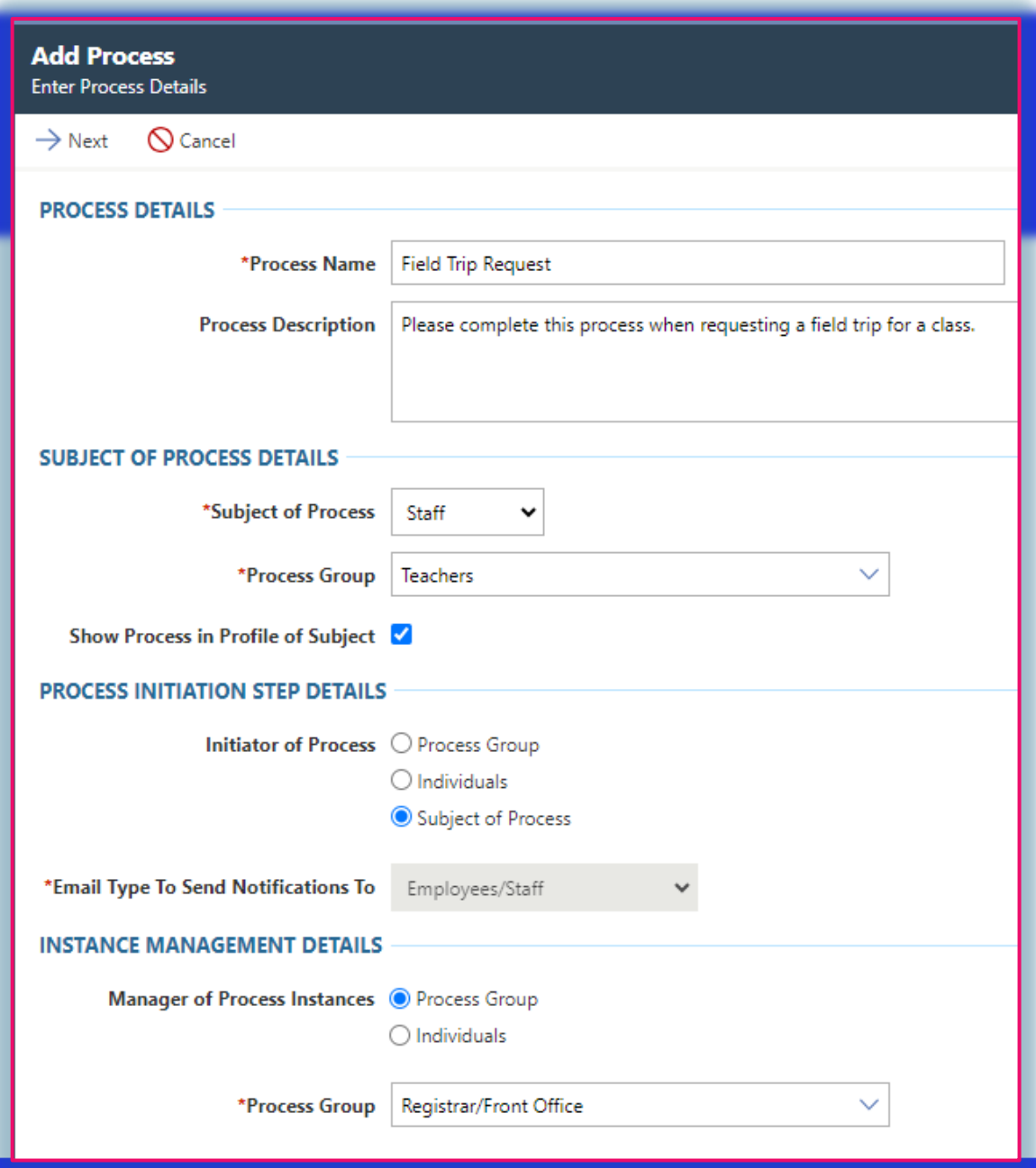
Create Online Form

- Online Forms are used in process when a process needs to capture input from a user, but
  - that user does not have access to the system screen that holds the information.
  - that data does not have a screen in the system.
  - the information being collected needs to be approved.
- For an Online Form to be available in a Process, during setup you must:
  - check the “Use in Process Manager” box and
  - publish the form.



Create the Process

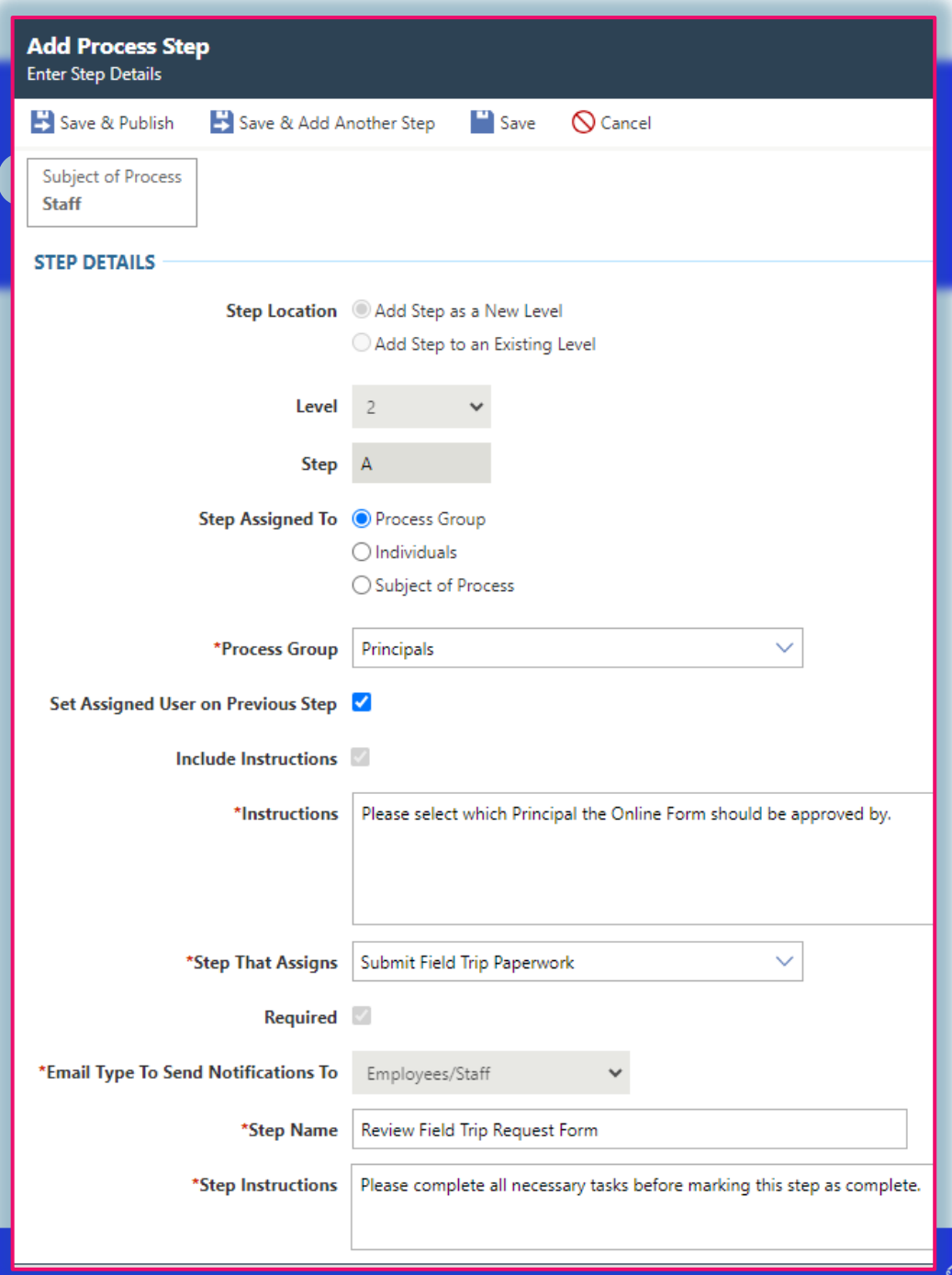
- Process Details
  - Provide name and description for the process
- Subject
  - In most cases, this will be who the process is about
- Initiation Details
  - Initiator – Who will have rights to start the process
- Instance Management Details
  - User(s) that will oversee the entire process.
  - This group will have rights to step in on anyone's behalf and mark tasks and steps as complete.
    - Note – the user's own security still applies, so if they do not have security to a link in the task, that link will not work for them.



Create Steps (part 1

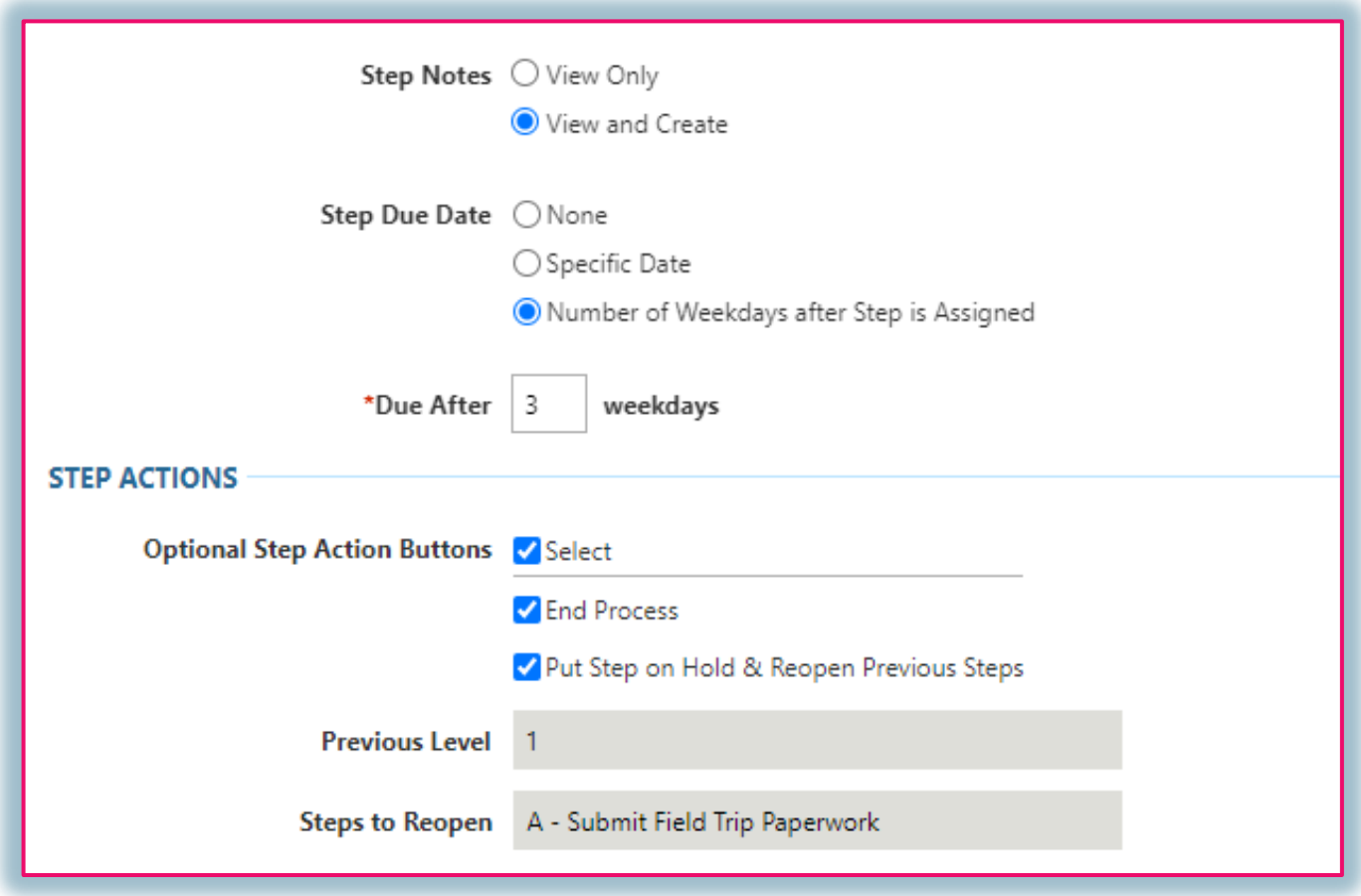
Step Details

- Location – Steps can be added:
  - in succession 1 – 2 – 3…or
  - as simultaneous 1 – 2a – 2b – 3…
- Assigned To – who will be responsible for tasks on the step
- Set Assigned User on Previous Step
  - Adds a task to the previous step.
  - The task allows the user completing the previous step to choose an individual from the group assigned to the current step. Only that individual will be assigned to the current step.
- Step Name
- Step Instructions
  - Provide information to the user that will be assigned to the step so they know what is expected on this step.

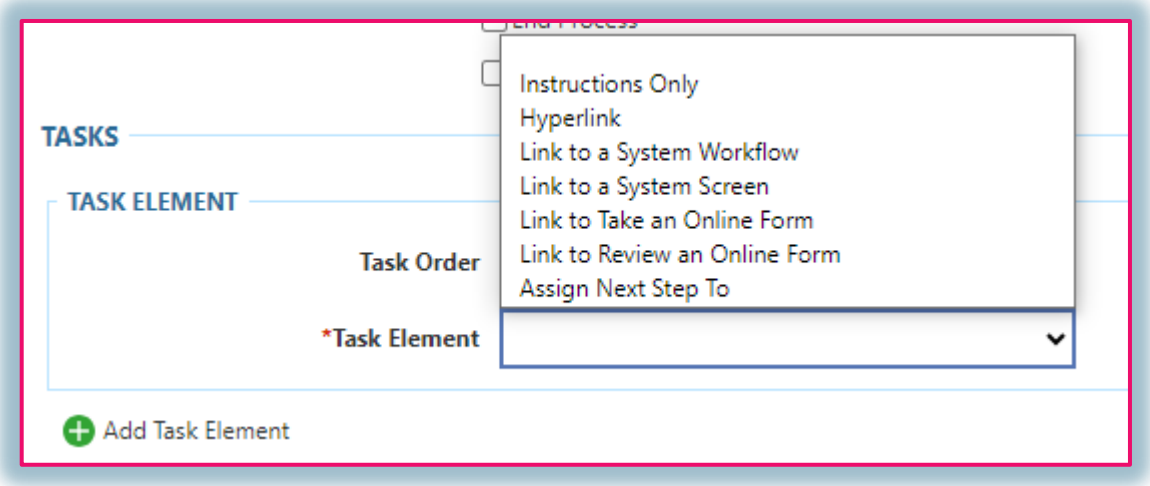


Create Steps (part 2 of 2)

- Step Notes
  - Determine if the user on this step can only view notes assigned to this step or if they can also create new notes.
- Step due date
  - Choose a specific date or set a number of weekdays after the step is assigned.
  - Does not take into account holidays or non-school days.
- Step Actions
  - End Process – allows users assigned to this step to end the process at that point.
  - Put Step on Hold and & Reopen Previous Steps – used for cases where something in the previous step needs to be redone.

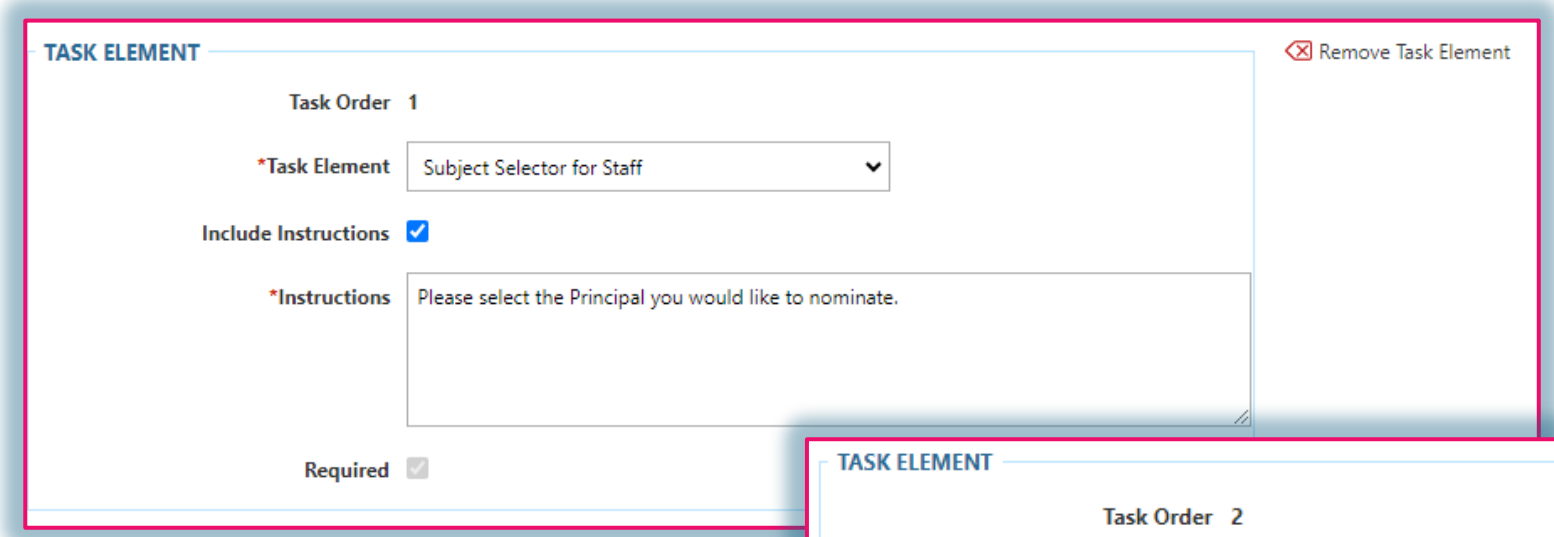


Creating Tasks



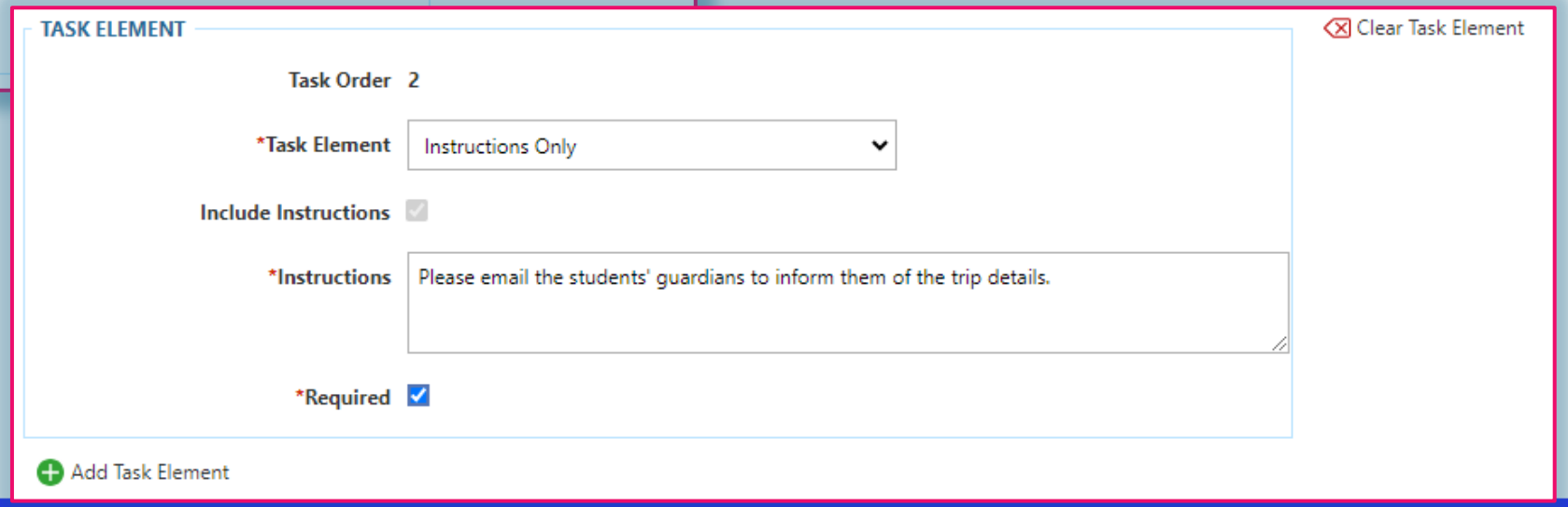
- Tasks that can be added to a step:
  - Subject Selector (1st step only)
  - Instructions Only
  - Hyperlink to a URL
  - Link to a System Workflow
  - Link to a System Screen
  - Link to Take an Online Form
  - Link to Review an Online Form
  - Assign Next Step To

Tasks: Subject Selector & Instructions



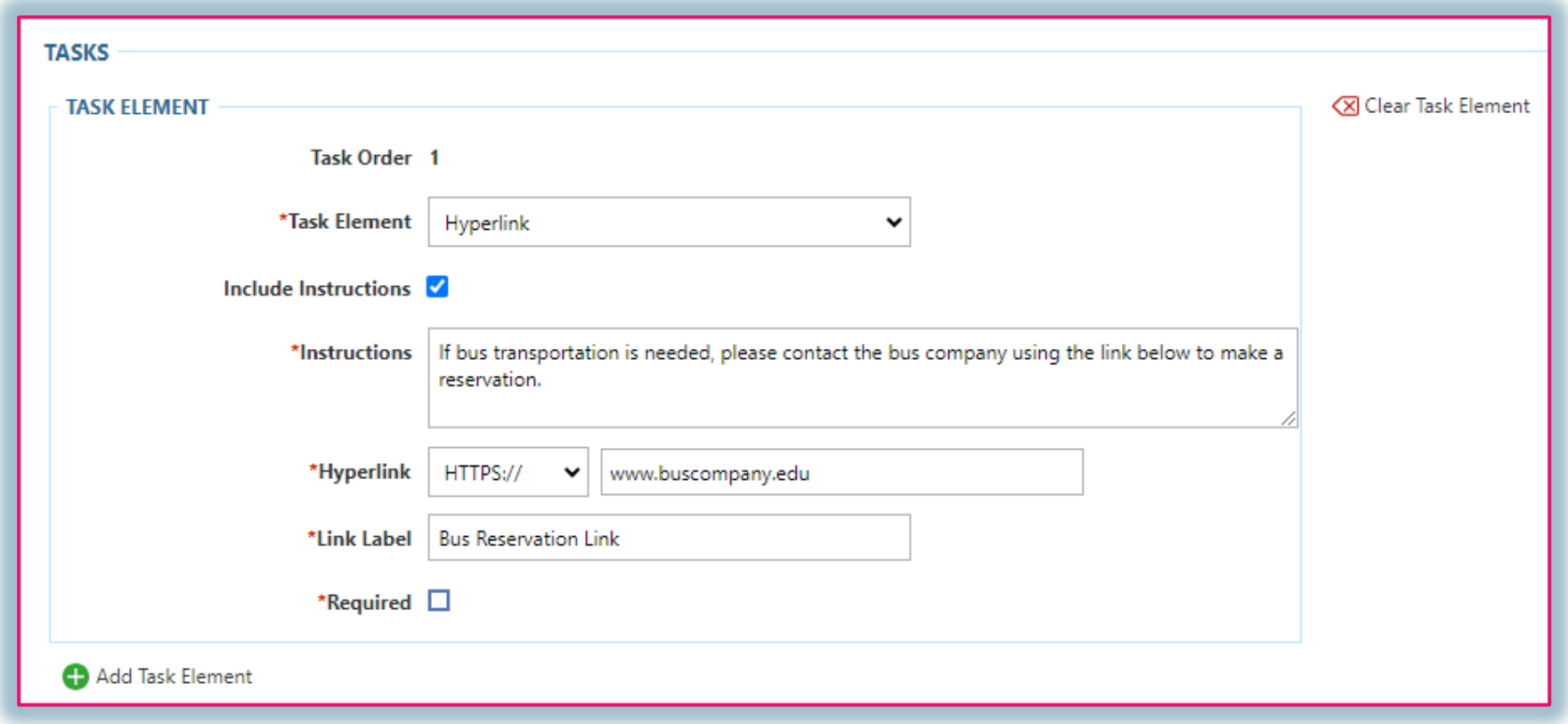
Subject Selector task is used when the person starting the process will select another user as the subject of the process.

Instructions Only task is used when a task needs to be completed outside of Qmlativ and there is no hyperlink for easy access.



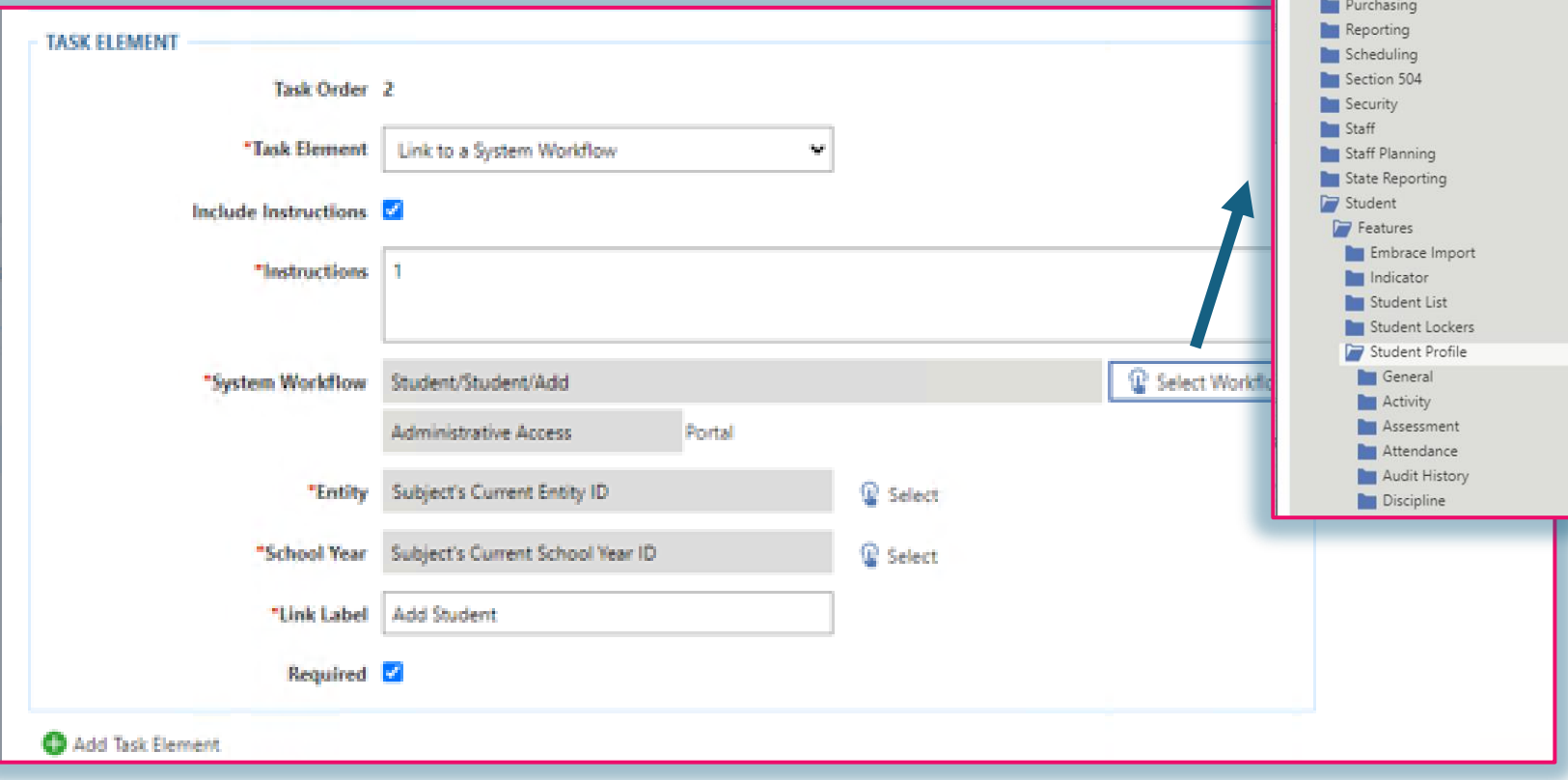
Tasks: Hyperlink

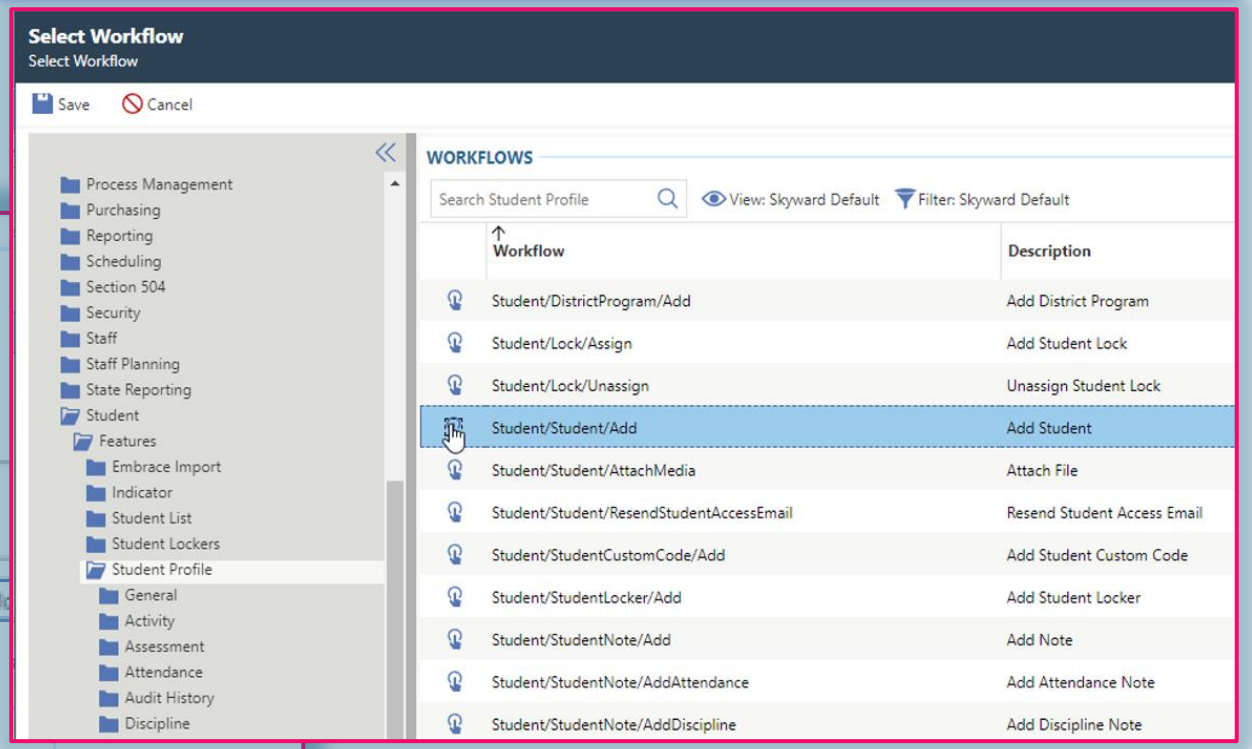
Hyperlink task is used when a link is available to help the user quickly navigate to the location where the task will be performed.



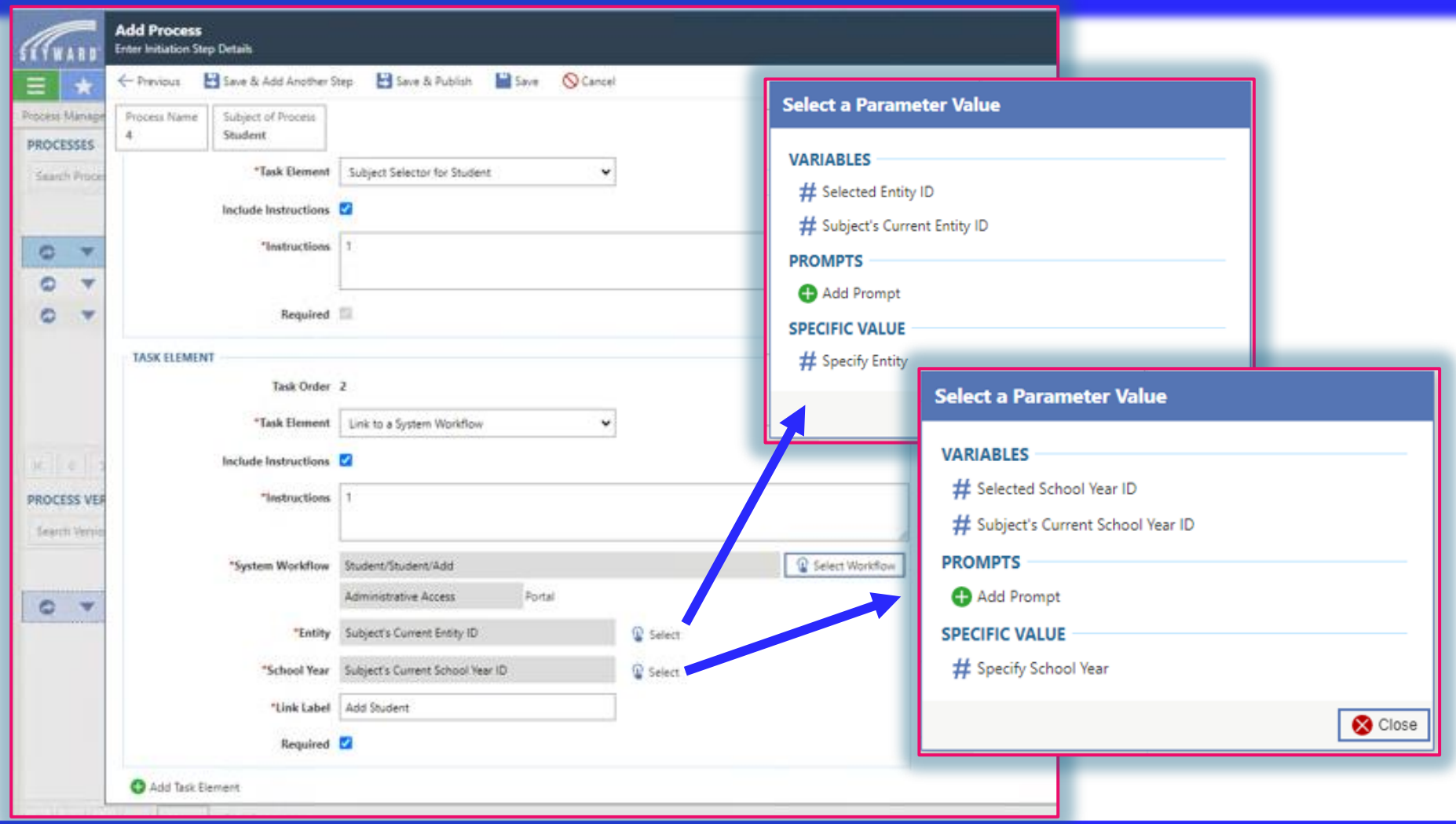
Tasks: Link to System Workflow

System Workflow task is used to launch a Qmlativ workflow for the task that needs to be done.





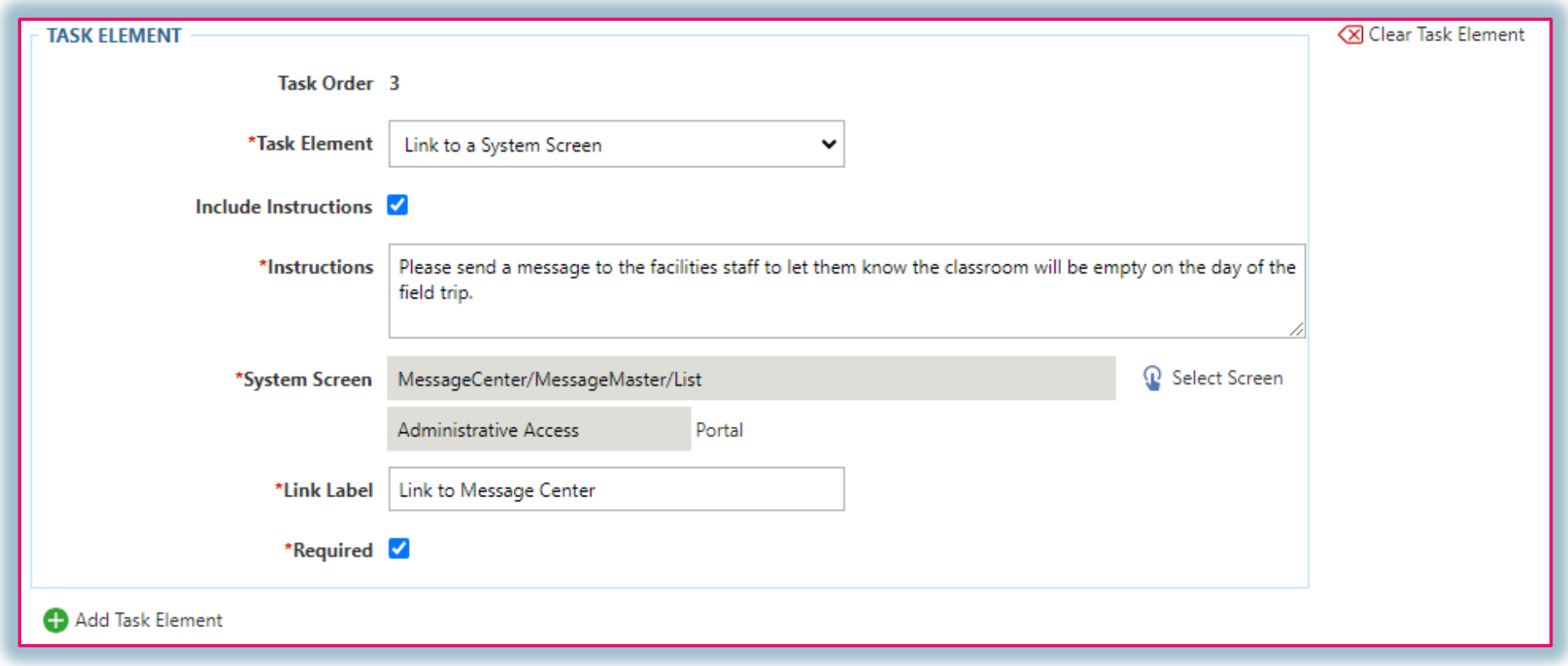
Tasks: Workflows with Parameters



- **Parameters** are like fill-in-the-blank information that a workflow needs to run.
- They hold values provided by a user or Qmlativ such as an Entity ID, a User ID, or a chosen date.
- These values tell the workflow who it's working with, what it should act on, or when the action should happen.

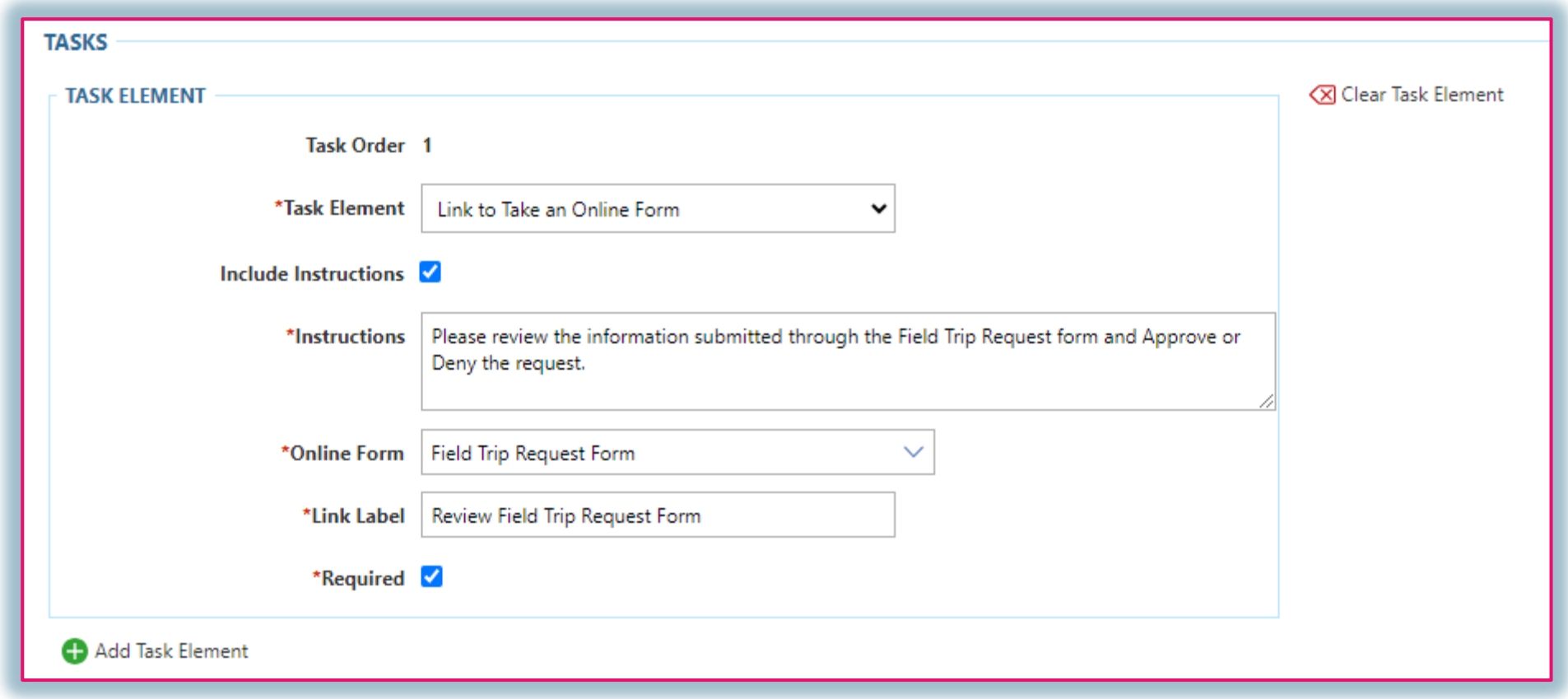
Tasks: Link to a System Screen

Link to System Screen tasks are used to provide a quick way for the user to navigate to a screen in Qmlativ where the task will be performed.



Tasks: Link to Take an Online Form

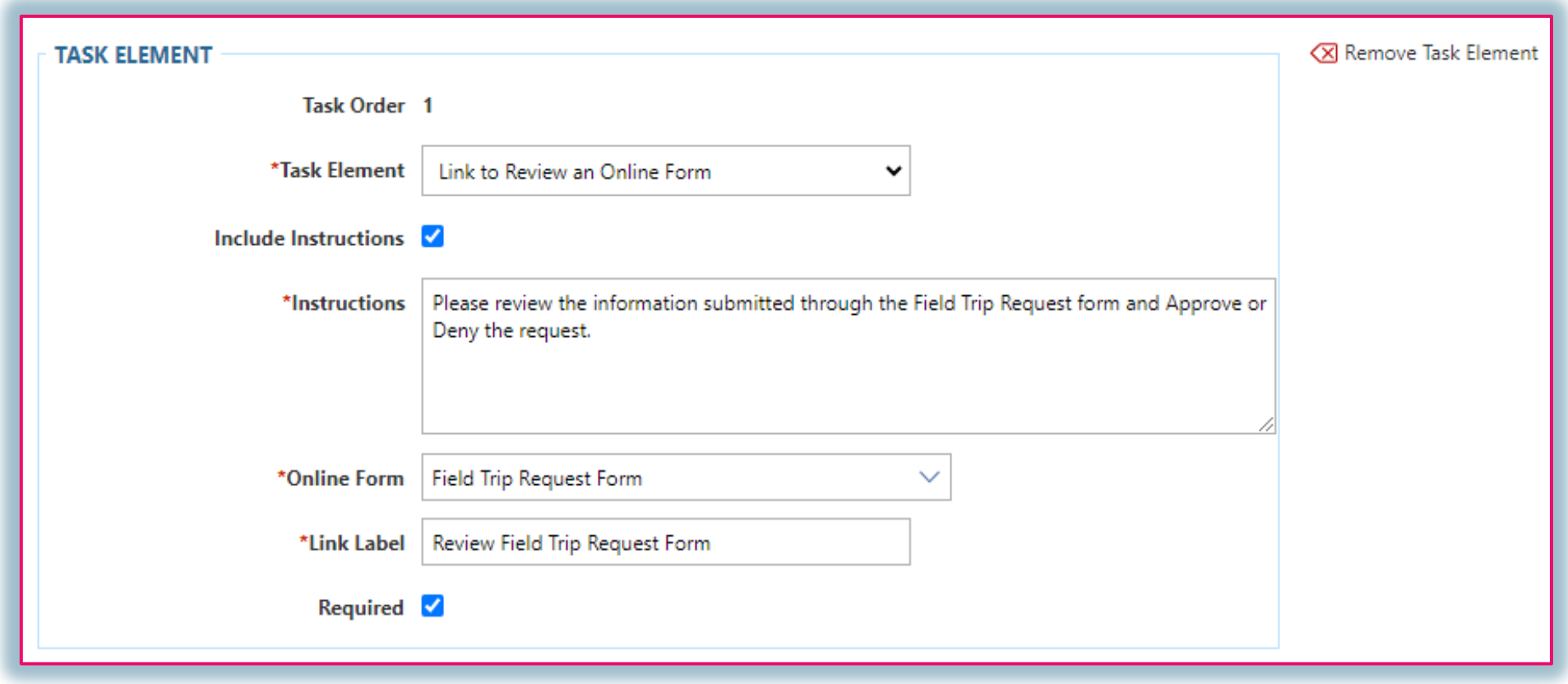
Link to Take an Online Form tasks are used to launch the online form that the user needs to complete as part of the process.



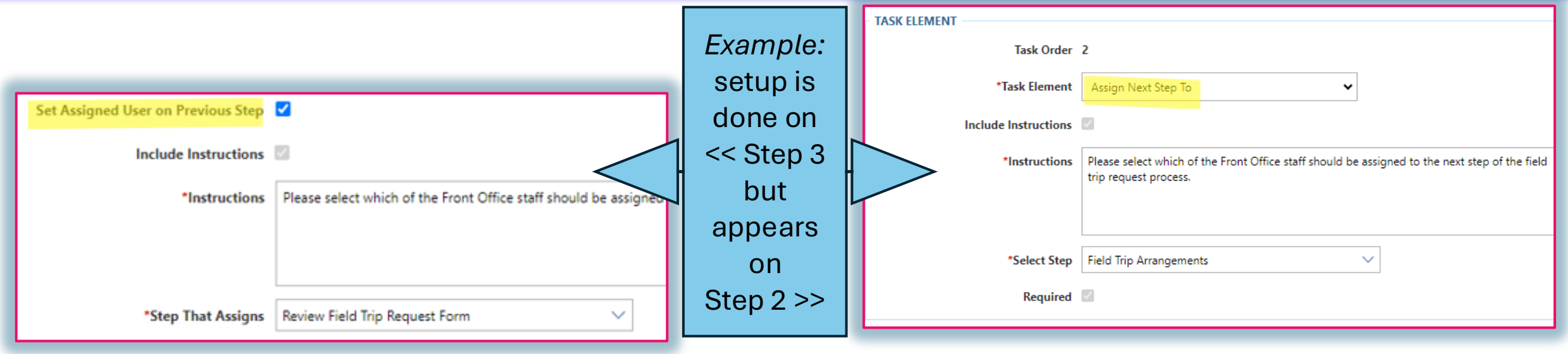
Tasks: Link to Review an Online Form

Link to Review an Online Form tasks are used to launch the online form approval that the user needs to approve and/or review as part of the process.

Note: *Users that are given this task must also be set as approvers on the Online Form.*



Task: Assign Next Step To Task

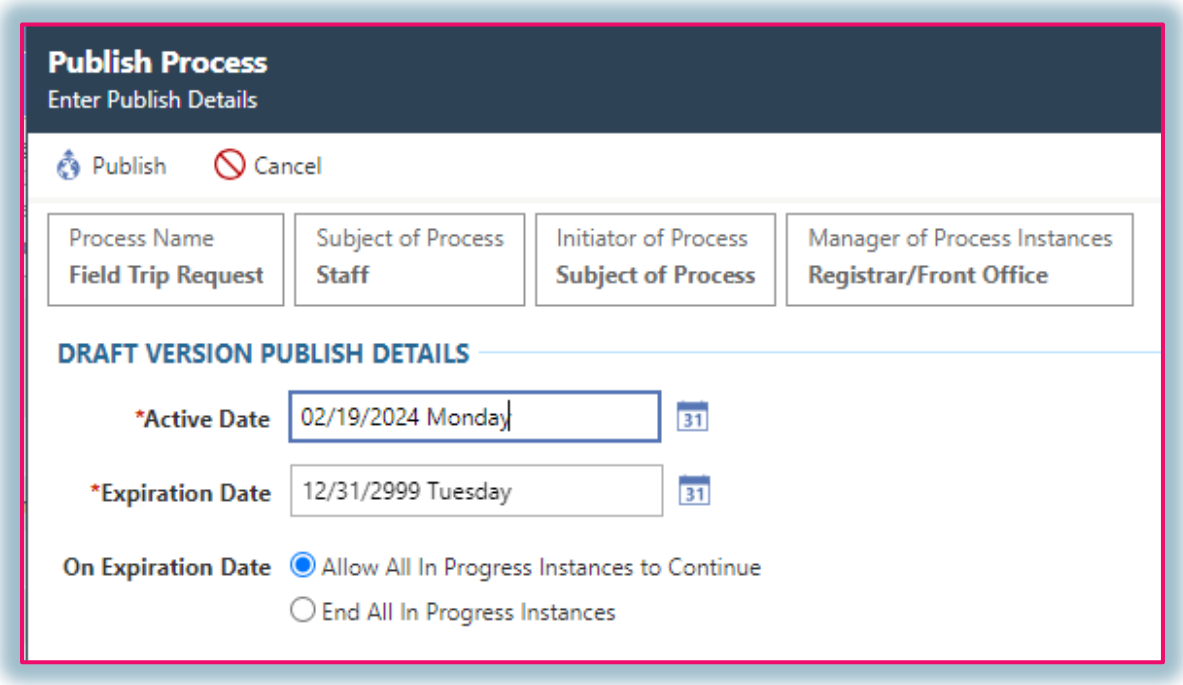


Assign Next Step To task is used when you want a user in the process to select a specific person to do the next step in the process.

Note:

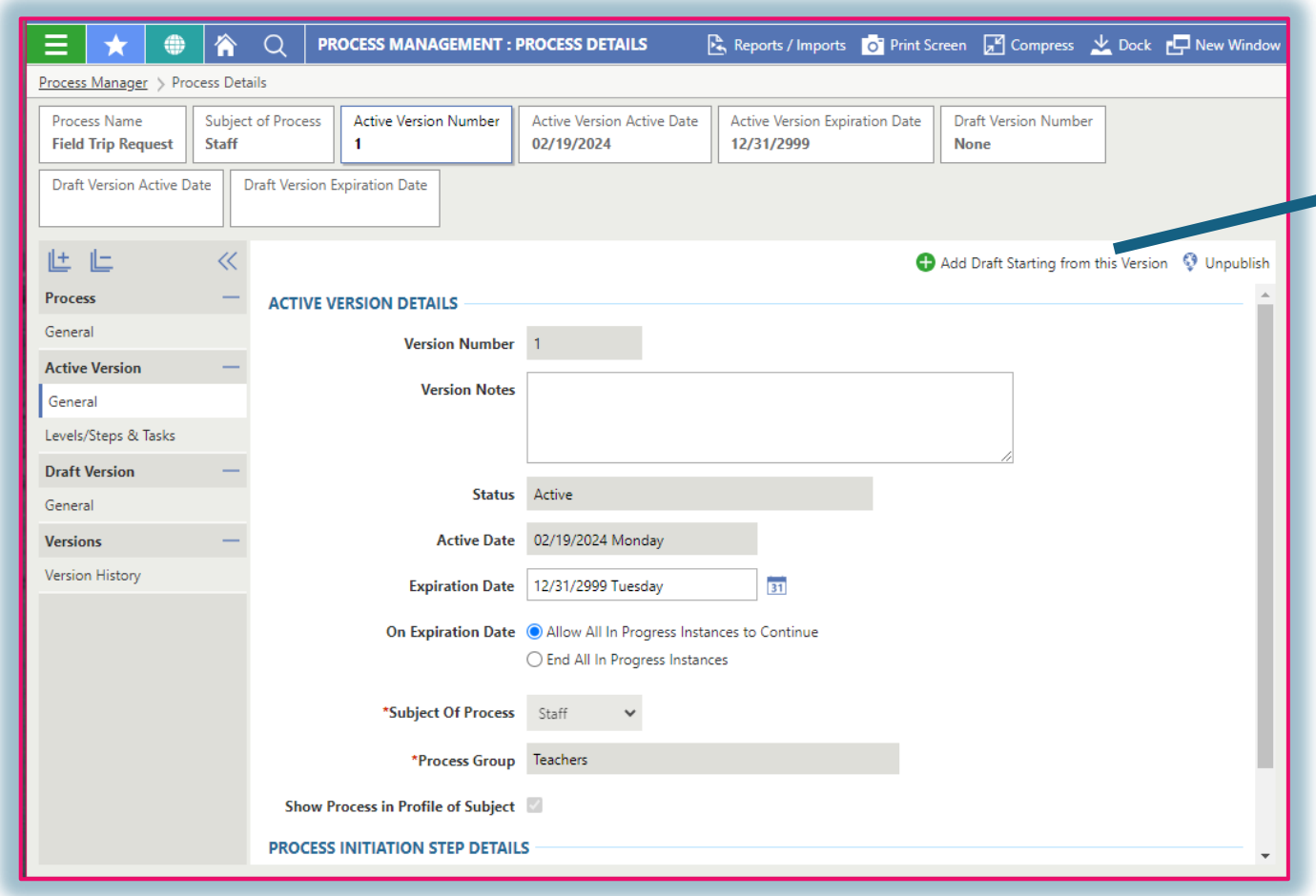
- This type of task is usually created in the step **<u>after</u>** where it will happen in the process.
- This is because the task needs to know which step we will be assigning but if that step has not been created yet, there is no step to select.

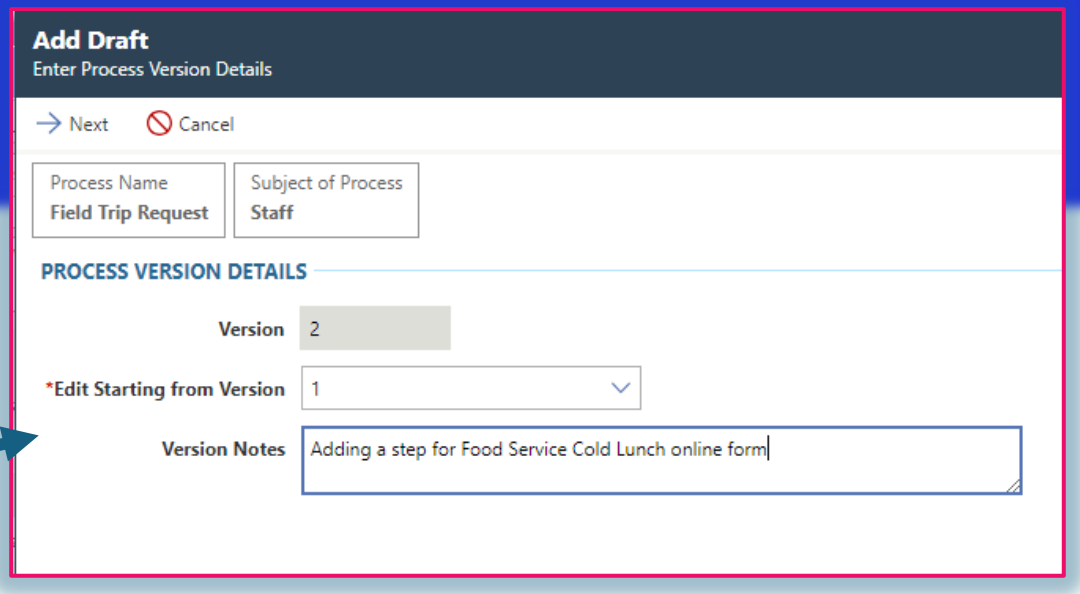
Publishing



- Publishing a process sets when the process is available for use.
- Active and Expiration dates control when it is available.
- On Expiration Date determines what to do with in-process instances when the date is reached.

Changes to a Process





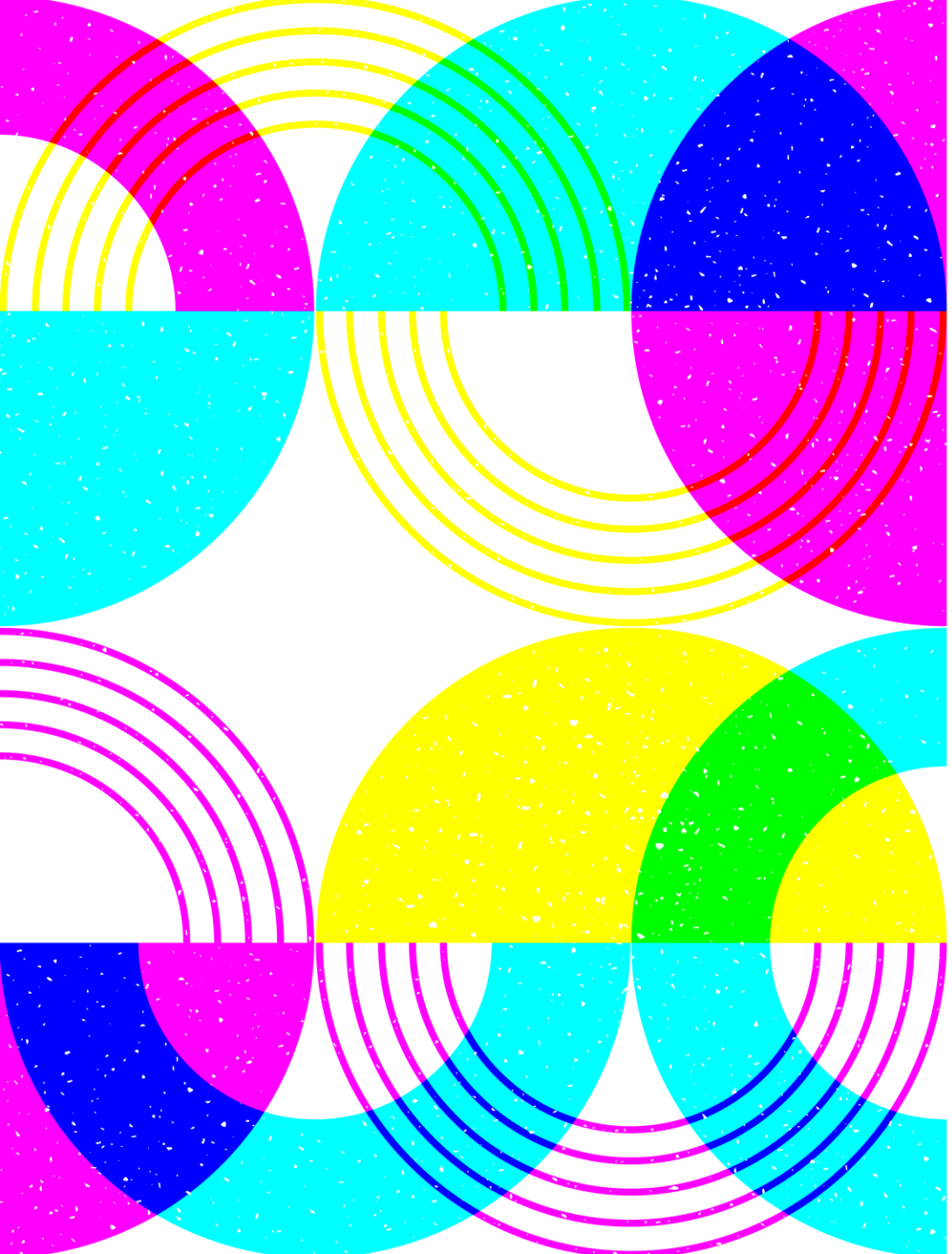
- Changes can be made to a Process by creating a “Draft” of the current (or previous) version.
- Once the changes have been made, the “Draft” is published.
  - The new version of the process is pushed out on the Active date.

Upcoming Enhancements



- **Move to Profile**
  - When you want the Process Instance to show under a profile that is not the subject of the process.
- **Display Process Context**
  - There are situations where the process and subject alone are not enough information. Adding a Context box will allow users to specify more information about that process instance.

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thank you!

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