

The logo for LONGJUMP, with 'LONG' in blue and 'JUMP' in green.

CLOUD APPLICATIONS PLATFORM

I want to create an approval process that can easily track incoming requests and their status

Quick Start Guide

## Introduction

**Welcome to our series of quick start guides designed to get you up and running fast.**

To map out an approval process create a workflow. A workflow is a way to pass records from one person to another.

This example will create a simple project request process. The request will be routed to the team, ensuring that each step is completed. In addition, the workflow will track who has taken action and when to track the status of each project.

Workflows are made up of **states**, **actions**, and **decisions**. A project request may have multiple states (e.g. evaluation, acceptance, rejection, production, review, and completion). Each state has an owner or set of owners responsible for advancing the flow by defined actions. Automatic routing rules are available on an action with the optional decision box.



# Getting to the Workflow controls



1. Select the object you want to add the workflow to, and click **Customize**.
2. Then choose **Workflows**.
3. Click **New Workflow**. A new workflow is created with the *Start* and *End* states created automatically.



**States** define where in a process the record is and who has control (the workflow owner).

**Actions** define what the workflow owner can do.

**Decision Boxes** define routing rules for actions based on data in the record.



## Create 1<sup>st</sup> state: Submit for Evaluation

1. First drag the state icon onto the canvas.
2. Fill in the name of the state.
3. For workflow owner, choose can take action during the evaluation state.



New State

**Basic Information**

Title: Submit for Evaluation

Name: Submit\_for\_Evaluation

Allow Record Owner to edit the record in this state:

**Workflow Decision Maker(s)**

Specify who is to make the decision that will advance the workflow. You can notify the decision maker(s) through email and/or a task when they have a record in waiting. You can also allow the decision maker(s) to edit record information

Workflow Decision Maker	Send Email	Create Tasks	Allow Edits	Post Feed
User choice	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Save Cancel

**3**

**A**

**B**

- A. Workflow owner can reply to the email without having to log to advance their workflow.
- B. They can click on a link in their Relay wall to advance the workflow without opening the record.

# Adding an Action

The screenshot displays the LongJump workflow editor interface. On the left is a 'Tool Box' with three options: 'Add State' (represented by a blue circle with a plus sign), 'Add Action' (represented by a blue double-headed arrow with a plus sign), and 'Add Decision Box' (represented by a blue diamond with a plus sign). The main workspace shows a workflow diagram with a green 'Start' state, a blue 'Submit f...' state, and a red 'End' state. A yellow tooltip points to the 'Start' state with the text 'Click to edit. Drag to reposition label'. A 'New Action' dialog box is open in the foreground, showing the configuration for a new action. The dialog has two tabs: 'Basic Information' and 'Notifications'. The 'Basic Information' tab is active, showing the following fields: 'From State' (Start), 'Title' (Start Evaluation), 'Name' (Start\_Evaluation), and 'Go to State' (Submit for Evaluation). The 'Notifications' tab is also visible, showing a field for 'Additional Users to Notify'. Below these tabs is the 'Criteria' section, which has two radio buttons: 'Basic Criteria' (selected) and 'Advanced Criteria'. The 'Criteria' section contains a table with columns for 'Field', 'Operator', and 'Value (Hint)'. The table has five rows, each with a dropdown menu for the field, a dropdown menu for the operator, and a text input field for the value. At the bottom of the dialog are 'Save' and 'Cancel' buttons.

Field		Operator	Value (Hint)

Next, drag an action from the *Start* state to the *Submit for Evaluation* state. Give it a name "Start Evaluation." This will be the button that appears on the record. When the user clicks on this button, the record advances to the Evaluation state and will await the next step.

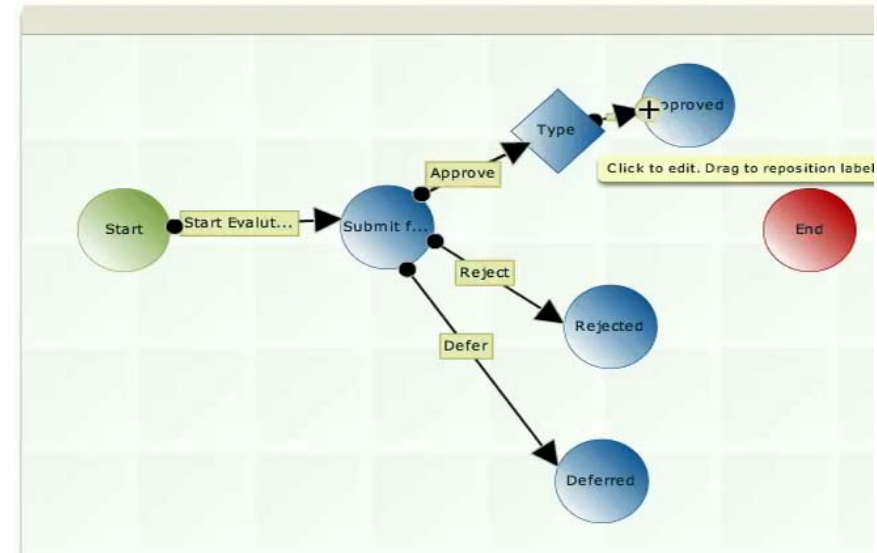
## Creating a decision point

Let's say we have different project teams: the *web* team, the *print* team, etc. with different responsibilities. We want to assign production tasks to them as part of the workflow.

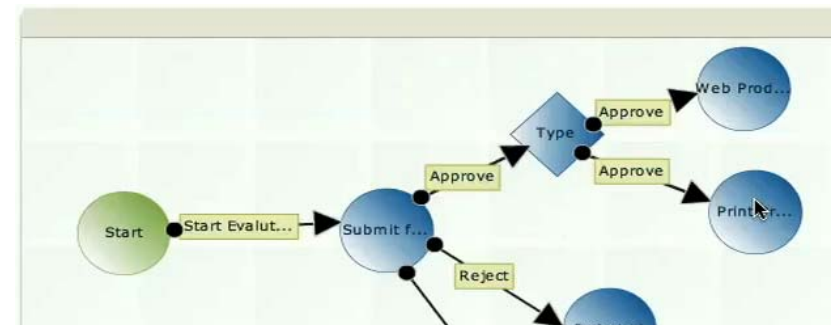
Create a single action call *Approve*.

Add a state for each production type, owned by a different person.

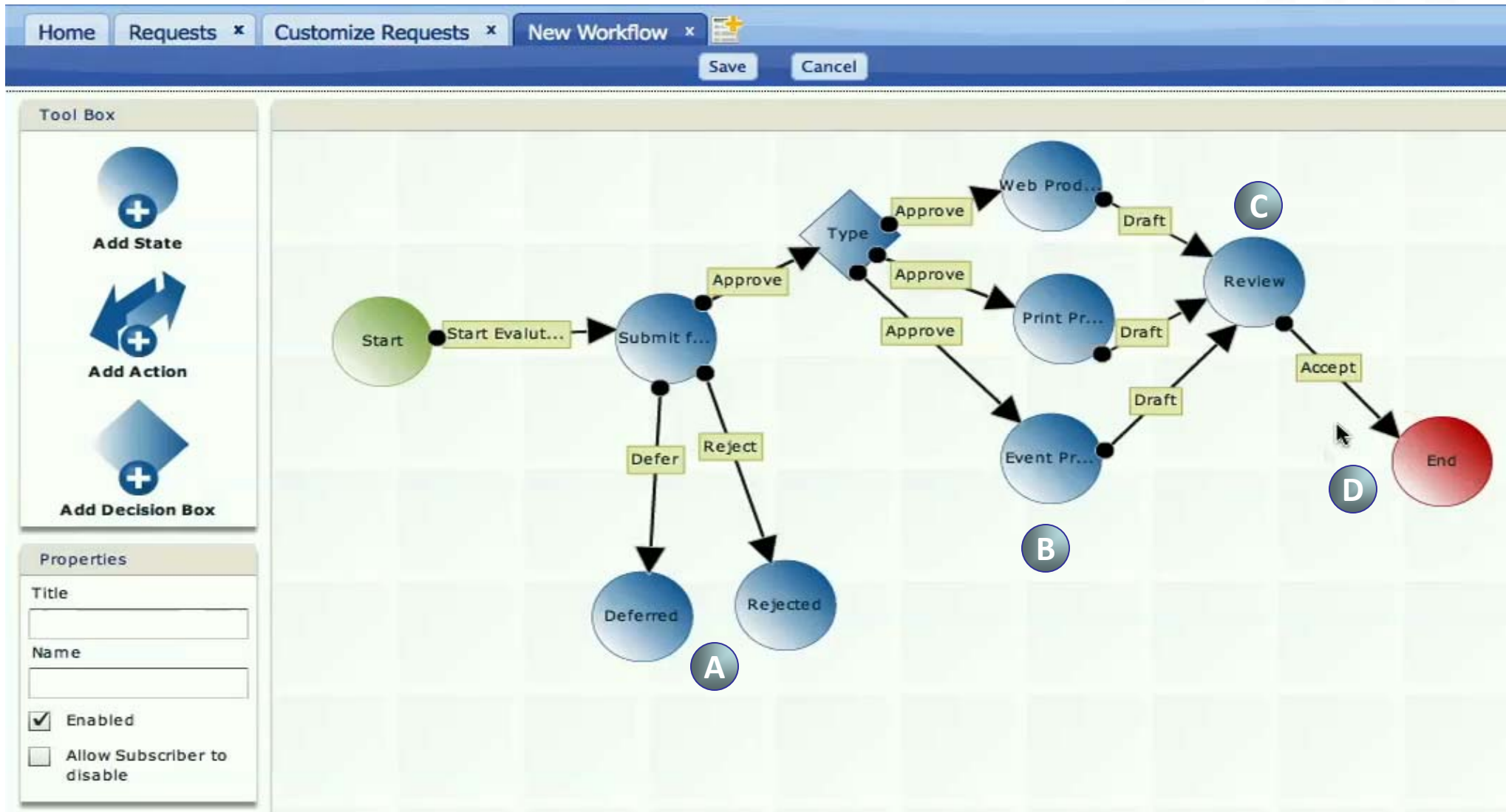
Add the decision box to check to see if it's a project related to the web, print, etc.



Criteria					
Type					
		Basic Criteria		Advanced Criteria	
	Field	Operator	Value	(Hint)	
	Type	Equal to	Web		



# Sample final workflow



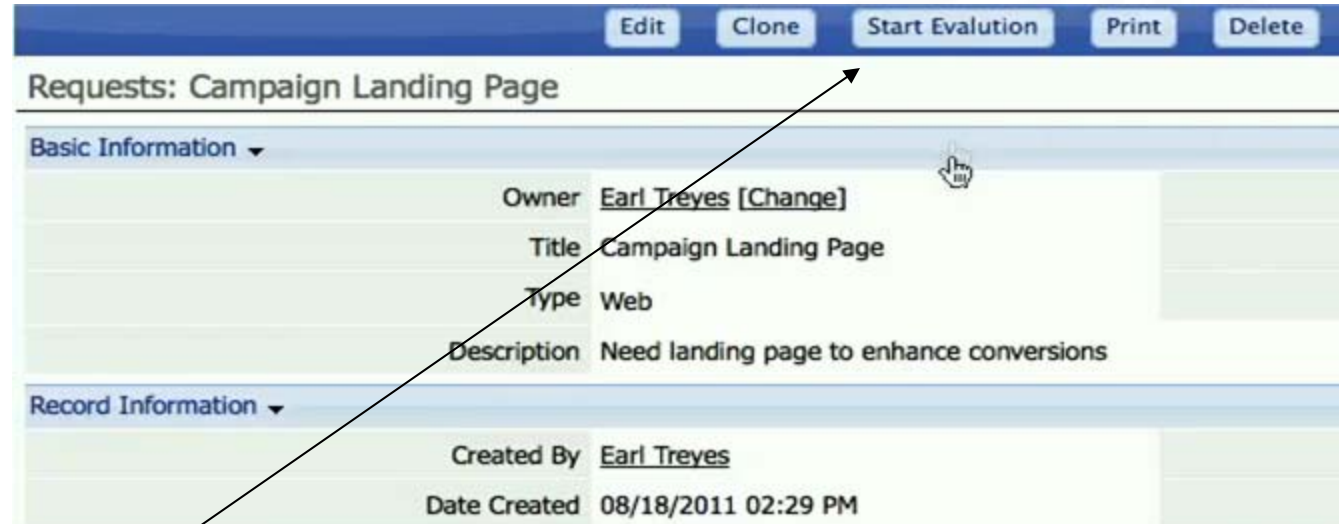
A. Additional states with different actions.

B. Type decision box determines how to route.

C. Review state may return control to requestor.

D. Acceptance of project ends workflow.

# How workflows show up with records



Requests: Campaign Landing Page

Edit Clone Start Evaluation Print Delete

Basic Information ▾

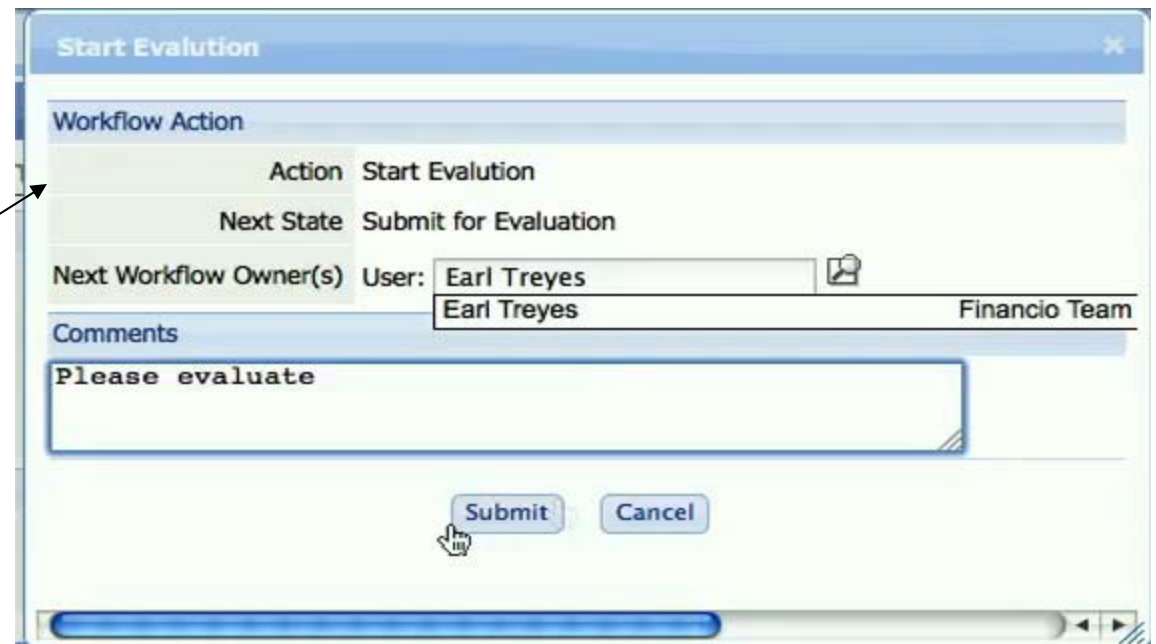
Owner	Earl Treyes [Change]
Title	Campaign Landing Page
Type	Web
Description	Need landing page to enhance conversions

Record Information ▾

Created By	Earl Treyes
Date Created	08/18/2011 02:29 PM

Action buttons appear on the top of the record's detail view.

Clicking on action brings up pop-up to advance to next state.



Start Evaluation

Workflow Action

Action	Start Evaluation
Next State	Submit for Evaluation

Next Workflow Owner(s) User: Earl Treyes  
Earl Treyes Financio Team

Comments

Please evaluate

Submit Cancel



# How workflows show up with records

Draft Change Workflow Owner Print Delete Customize this Form

Requests: Campaign Landing Page | Show Relay | Follow | Tags: none

Open Activities [New Appointment](#) [New Task](#)

	Subject	Date	Status	Assigned To
<a href="#">Send Note</a>	<a href="#">State Changed - Web Production</a>	08/18/2011	Not Started	<a href="#">Earl Treyes</a>

Activity History [Send Email](#) [Log Activity](#) [View All](#)

	Subject	Date	Status	Assigned To
<a href="#">Send Note</a>	<a href="#">State Changed - Submit for Evaluation</a>	08/18/2011	Completed	<a href="#">Earl Treyes</a>
<a href="#">Send Note</a>	<a href="#">Action required for Campaign Landing Page</a>	08/18/2011	Completed	<a href="#">Earl Treyes</a>
<a href="#">Send Note</a>	<a href="#">Action required for Campaign Landing Page</a>	08/18/2011	Completed	<a href="#">Earl Treyes</a>

Workflow History

Workflow	Previous State	Comments	Action	Next State	Modified By	Date
Marketing Requests	Submit for Evaluation		Approve	Web Production	<a href="#">Earl Treyes</a>	08/18/2011
Marketing Requests	Start	Please evaluate	Start Evaluation	Submit for Evaluation	<a href="#">Earl Treyes</a>	08/18/2011

Workflow actions are recorded as part of the record details and can be displayed in reports and views.

The background features a bright sun at the top center, with rays of light extending downwards and outwards. The sky is a gradient of blue, with several white, stylized clouds. Two birds are flying in the sky. The overall theme is bright and optimistic.

# LONGJUMP

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