



OVERVIEW

Forms & Workflow. An Overview.

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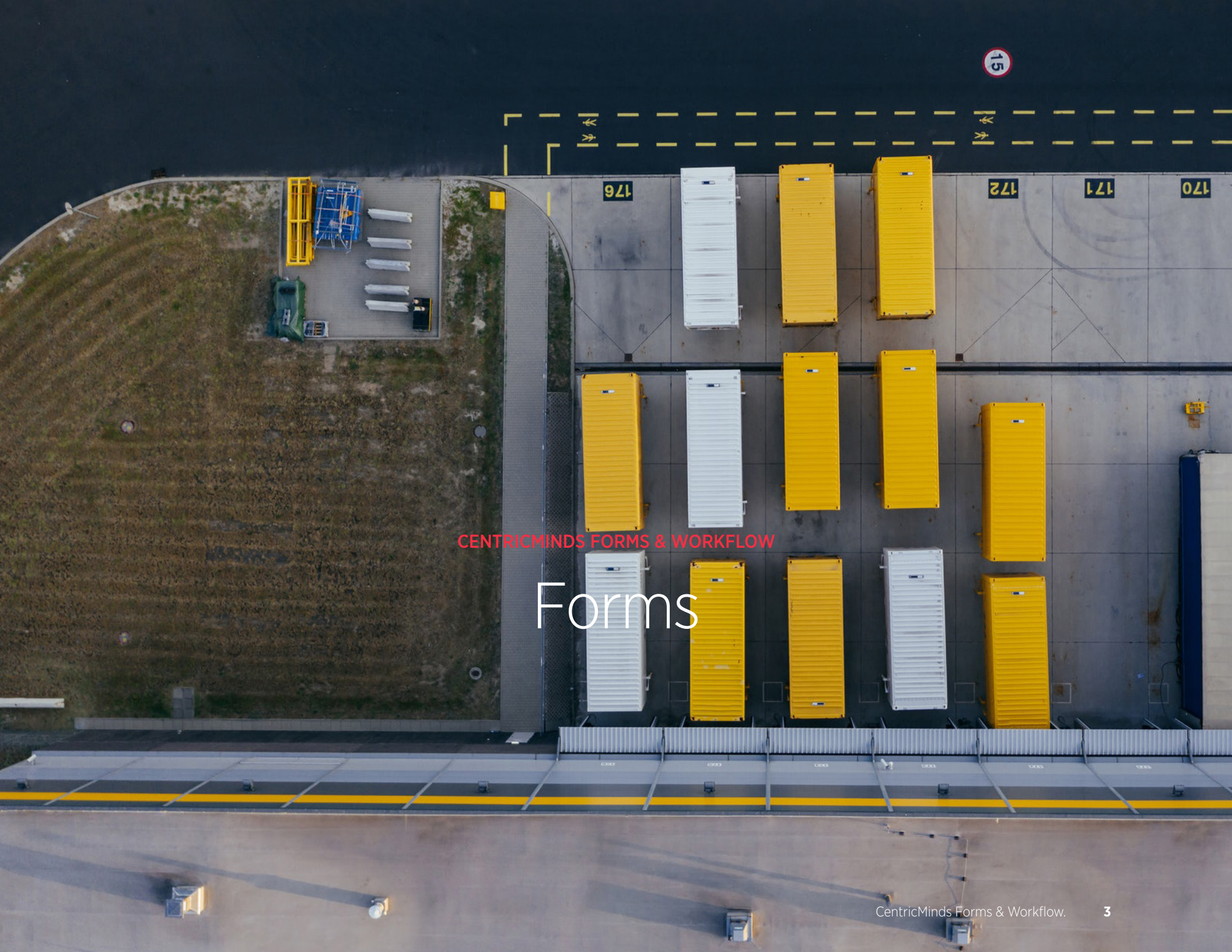
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About this document.

The modern Digital Workplace is challenged by an ever growing landscape of apps that aim to solve small parts of the overall productivity puzzle. At the center of the workplace are common file management tools which still adhere to work paradigms from last century. Beyond simple file management, these tools lack the ability to automate how both content and data can be shared and actioned by team members.

Organizations are now seeking solutions which aim to consolidate this fragmented landscape of discrete apps, and provide an integrated approach for both content and data that streamlines and delivers gains in productivity.

This document provides an overview of the Forms & Workflow Management tools that are native to the CentricMinds Digital Workplace platform. These tools are not third party products, and the value of having native Forms and Workflow within CentricMinds delivers benefits beyond competitive solutions. Customers across all industries rely on CentricMinds Forms and Workflow Management to automate all types of business processes for teams both internal and external to their operations.



CENTRICMINDS FORMS & WORKFLOW

Forms

Design and Publish Forms.

CentricMinds provides a native environment for the design and creation of forms. Using the browser based tools, non-technical business users can design and assemble single or multi-part forms that can be published to any web page managed within the CentricMinds platform. All regular form fields are supported, and fields can also be populated from external data sources. Form Groups enable the creation of multi-part forms, where conditional fields can be set to determine what fields are displayed for users based on their selection.

Change Request

KEY CONTACTS

- Tim Anders
Project Manager
- Terry Dawson
Project Manager

Name *

Chloe Bracks

Date Required

Change Type *

Natural Gas Request

Change Notes

Submit >

Forms > Modify Form

1 Form Details

- Title* Change Request
- Action Override
- Background Image
- ID 1078
- Resource ID 6025

2 Form Builder

- Grid 20px
- Form Stage Width 625
- Form Stage Height 600

Name

Date Required dd/MM/yyyy

Change Type Natural Gas Request

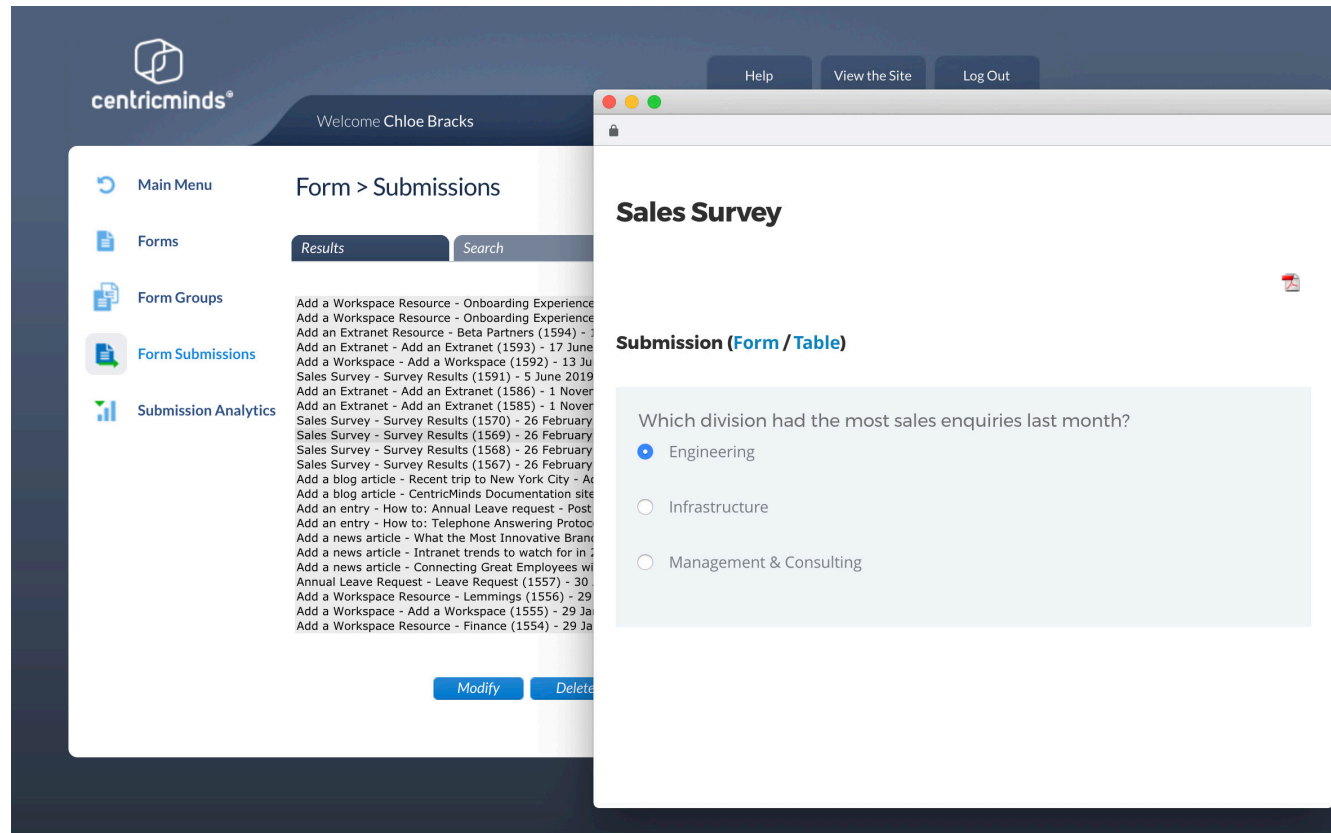
Other

Change Notes

Forms are also responsive within CentricMinds, allowing forms to be presented to users across PC, Tablet and Phone. This enables organizations to reach teams across different work environments with targeted and personalized forms.

Form Submission Management.

Administrators have a range of options in determining how form submissions are managed within CentricMinds. The capturing of form data can be configured to drive page publishing, document rendering (the conversion of captured form data into Adobe PDF format), digital signing (using 3rd party signing services like DocuSign), and triggering workflow processes.



The Form Submission Repository enables administrators to report on and download form data for use within third party applications including CRM, BI, ERP, etc.



CENTRICMINDS FORMS & WORKFLOW

Workflow


Automate your operation.


At the heart of CentricMinds is a native workflow engine. Non-technical business users are able to design and assemble simple or complex workflows that can be associated with resources; forms, documents, pages and metadata. This combination of workflow and resource association enables organizations to develop sophisticated workflow driven automation across their Intranet, Extranet and external facing website.

IN THIS SECTION

Reports

KEY CONTACTS

 Tim Anders
Project Manager

 Terry Dawson
Project Manager

Workflows

Display results per page
Showing 1-1 of 1 results.

Pending

Approved

Declined

Search

Date	Request ID	Workflow Name	Initiated By	Resource Name	Status
	No Filter	No Filter	No Filter	No Filter	No Filter
21/08/2019, 11:41	192	Change Request Workflow	Chloe Bracks		Pending
Change Request (Request # 192)					
Workflow Process		Change Request Workflow			
Request Type		Add Form Submission (Resource ID: 6467)			
Requested By		Chloe Bracks			
Request Made		20 Aug 2019 19:41			
Approval State		pending			
Approval Step (Manager): Manager Approval					
Jane Royal		pending		Re-assign / Remove	

Workflows are derived through the association of groups containing one or more users. A process type is defined to determine how the workflow will progress. A non-unanimous workflow requires only one user from the group to approve a step in order for the workflow to progress. A unanimous workflow requires all users to approve a step, and an ordered workflow will follow the workflow in the order in which the groups are assembled. Workflows also support the embedding of other workflows, allowing for sub routines to be performed by users first in order for steps within the primary workflow to proceed.



CENTRICMINDS FORMS & WORKFLOW

Use Cases

Order Request Form Workflow.

Forms and workflow automation enable organizations to evolve their information management strategies beyond simple file management and email driven tasks. The following use cases document how forms and workflows in CentricMinds are readily used by organizations to automate a range of content and document processes.

The following is a typical scenario that CentricMinds readily solves through the use of Forms & Workflow.

The Problem

Staff members were printing a PDF order form and manually completing them in order to raise an order for a customer. The paper trail resulted in unauthorized orders being raised, overlooked orders being booked and no ability to track the date of the order placement.

The Solution

An Order Request Form was created and published to the Intranet. Staff now complete a digital form. The form submission triggers an Order Request Workflow. Within the Order Request Workflow, an Order Request Approver (a single user) reviews the order request, and then decides whether to approve or decline the request. In the event the order request is approved, the order request is then delivered to management dashboard for action by finance.

The Result

An audited repository of all orders that have been made by staff, who was the approver and when was the order request sent to finance for action.

Document Publishing Workflow.

A popular scenario is the management of document publishing activity.

The Problem

Staff were publishing documents to client extranets. In some scenario's, staff were publishing to the wrong documents to the wrong clients.

The Solution

A Document Publishing form was created and published to the Intranet. When staff members choose to publish a document to any client extranet, the action will trigger a Document Publishing Workflow. Within the Document Publishing Workflow, the Approvers (there are two users) are required to review and approved following an ordered process type; the first user must approve in order for the second user to be notified there is a document that requires their review and action. Once the workflow has been approved, the document will be published and become accessible by external clients.

The Result

Clients receive the correct documents. The workflow process provides an audit trail of all document publishing activity.

Job Board Posting Workflow.

The following combines forms, workflow and web page authoring within CentricMinds.

The Problem

Department managers would send their new role requests to HR, and HR would send a weekly email to all staff promoting new roles available within different departments. Interested staff members would then email back their interest creating a management challenge for HR.

The Solution

A Post a New Job form was created on the Intranet to allow Department managers to complete their own job requests. The form submission triggers the Post a New Job Workflow. Within the Post a New Job Workflow, an Approver (a single HR user in this example) can first review the new job post, and then decide whether to approve or decline the new job. In the event the new job post is approved, the form data will be transformed into a new web page, and automatically be listed within the existing Job Board on the Intranet for all staff to see.

The Result

Staff can browse the Job Board, filter jobs by department, location, date and reply to jobs which can be sent to both HR and the Department manager for review.

Content Publishing Workflow.

Another type of workflow relates to the action of authors adding or modifying web content. This content might be in the form of a news release, blog post, project overview page, web article, etc.

The Problem

Staff have access to publish all types of web content on the Intranet. This includes editing existing web content published by other authors. In some scenarios authors do not want their content to be modified by other authors, and the organization has a duty of care to ensure that all content being published for access by the entire organization meets standards of compliance.

The Solution

When a staff member publishes a news release this action triggers a Content Approval Workflow. Within the Content Approval Workflow, the Approvers (there are three users in this example) are required to review and approve the news release. However, the Content Approval Workflow is a non-unanimous workflow; only one of the three users is required to approve the news release in order for it to be published. In the event the news release is approved, the news release will appear within the News section of the Intranet for the entire organization to view.

The Result

Improved governance over how the organization provides content publishing rights to different authors. The organization also maintains control over what is published for access by everyone.



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