On2Biz Customization Guide

version 1.2

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14th June 2009	1,0	Initial draft based on new feature list for Q4 2009	Jane P.
1st July 2009	1.1	Modifications based on feedback from customers	Jane P.
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Introduction

On2Biz is a highly customizable workflow platform provided by Reach1to1 Technologies.

This guide explains the basic workflow terminology used in On2Biz and the workflow model in On2Biz with explanation of the data structure and customizable areas. Further, it describes the steps involved in setting up a customized workflow in On2Biz.

This document is expected to be used in consultation with an On2Biz expert.

The appendix describes the types of workflows that On2Biz is best suited for.

Basic Workflow Terminology

Task

- is a specific action to be performed by a person

Project

- identifies the objective or desired outcome that can be achieved by performing one or more tasks

Milestone

- indicates stages of progress of the project to all concerned

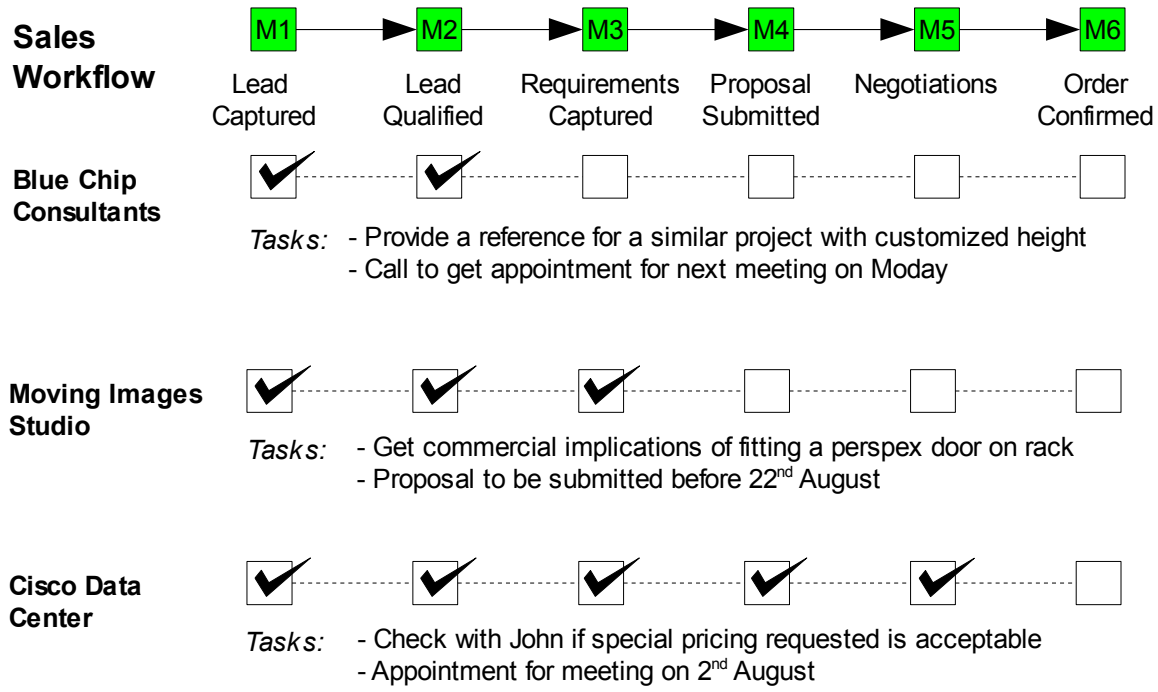
Workflow

- is a pattern that is repeatedly used for execution of multiple projects
- it consists of:
  - repeated tasks or milestones
  - policies and rules that need to be followed in each project
  - the formats of information that needs to be captured in each project

Workflow Instance = Project

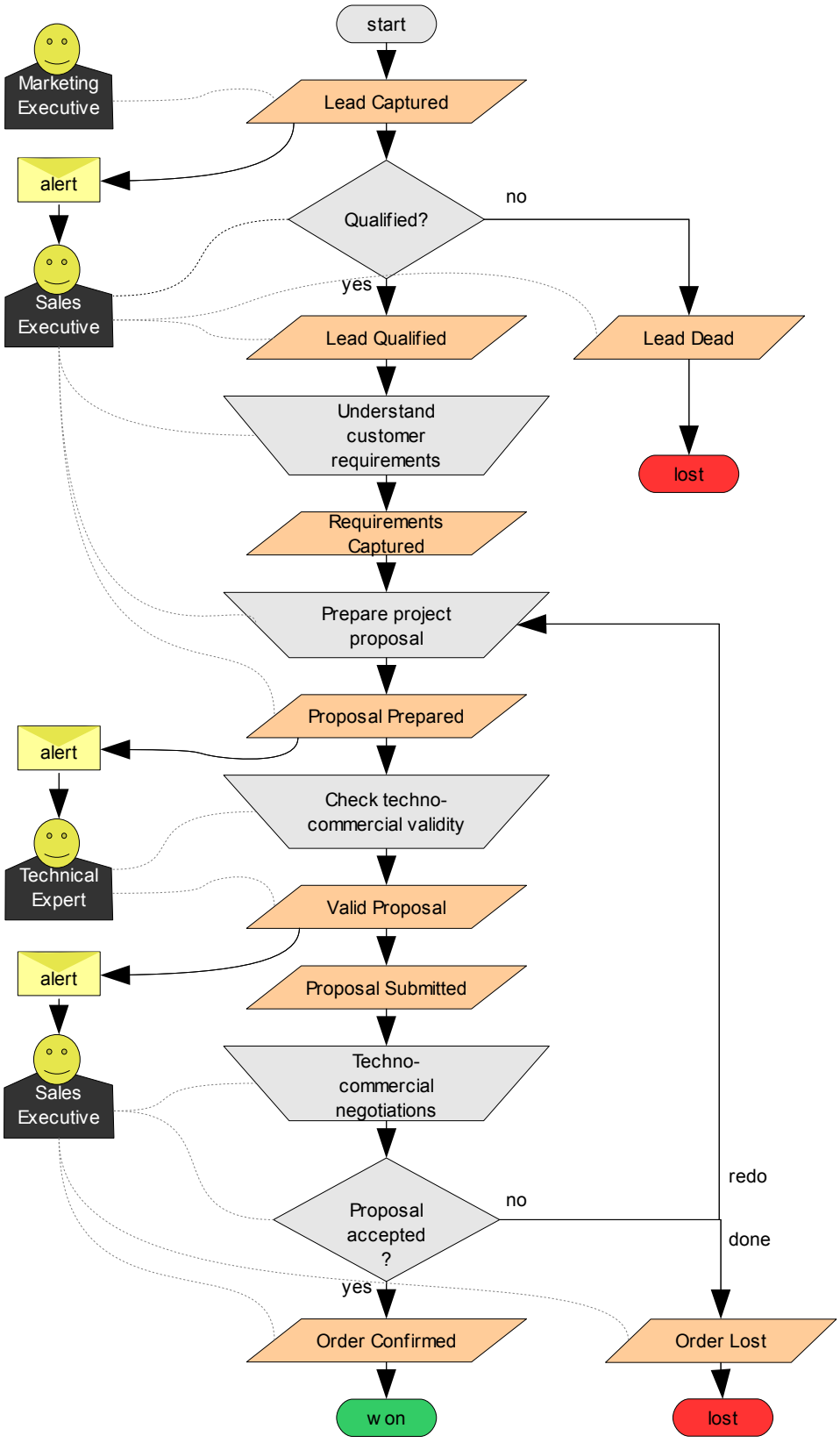
- an individual project that follows the workflow pattern is referred to as an instance of the workflow

The following diagram illustrates a simple workflow used for tracking project sales:



Workflow Chart

The workflow chart below is a more detailed representation of a sample workflow to be implemented in On2Biz. It shows the milestones ( ), the tasks to be performed( ), decisions to be taken( ), responsibilities for tasks and milestones ( ), and alerts( ) generated at milestones.



Workflow Model

Once the workflow chart is prepared, a detailed workflow model is built that implements the workflow in On2Biz. This section details out the various sections of the workflow model.

1. Associates

Each project is associated with various external entities, such as End Customer, Consultant, Distributor etc.

The workflow model defines which roles are associated with each project. For example, in the sales workflow example, the following roles are defined:

1. End Customer – The end customer to whom the project is being offered to
2. Consultant – The consultant who may be consulting with the end customer and who will influence the purchase decision and project execution

For each type of associated entity, the following data is captured:

- Company name – automatically looked up from the company database
- Contact persons – one or more contact persons, and their respective contact details
- Locations – one or more location addresses of the company

2. Overview

The project overview section contains data that is related to the project as a whole. The following data is captured by default:

- Project Title – a title for the project
- Description – a detailed description of the project
- Project manager – the user who is in charge of the project
- Project team – one or more additional users who are associated with this project
- Start date – the date on which the project was started
- Expected end date – the date on which the project is due to be completed

Any additional data fields can be added to customize the project overview

3. Deliverables

The deliverables are specified as a list of product or solution categories, which are customizable. Each project can be associated with one or more categories.

Each category can have the following data associated with it:

- Category Name - specified in the workflow, not editable for each project
- Values - numeric fields that specify the values associated with the category. Each value can be given a custom title
- Category Form – a customizable form that captures any data fields related to the category

4. Milestones

The workflow representation is converted into a detailed workflow definition. The workflow definition is created as a sequence of milestones with their respective properties.

The following table describes the various properties that each milestone can have:

No	Parameter	Description	Example
1	id	A unique identifier for the milestone	sp_005
2	title	A title that describes the milestone	Proposal Prepared
3	help	Text that is shown as help for the user	This milestone signifies the preparation of a proposal based on the requirements of the customer
3	type	One or more keywords that control the behaviour of the workflow at this milestone. Following keywords are supported: close = this milestone closes the project success = this milestone indicates success of project objectives redo = this milestone can be redone undo = this milestone can be undone	redo
4	groupid	When more than one milestone have the same group id, they are considered to be exclusive alternatives. That means, only one milestone in the group can be completed.	-
5	role	User role that is responsible for completing this milestone. Pre-defined roles are: project_manager – person in charge of the specific project project_team – person belonging to the project team team_manager – person to whom the project manager reports to category_manager – person who manages the product categories which have been specified in project deliverables In addition to the above pre-defined roles, additional global roles can be defined, such as based on department, division, designation or location	sales
6	undo_role	Role that is allowed to undo the milestone. Undo allows the user to reset the completion of the milestone, thereby pushing the workflow back to the previously completed mielstone. This is useful for occasional backtracking of the workflow. If not specified, the default undo_role is the same as the role for completing the milestone*	-
7	redo_role	Role that is allowed to redo the milestone. Redo allows the user to redo tasks associated with the milestone. This is useful to handle simple loops such as approval loops. If not specified, the redo_role is the same as the role for completing the milestone**	-
8	compulsary	If set, this milestone blocks all following milestones. Till a compulsary milestone is completed, no following milestone is enabled in the workflow.	yes
9	max_wait_time	The maximum time for which the project can wait at this milestone. If exceeded, escalation alerts will be sent as per the escalation rules configured. Time units are suiffixed to the numeric value, such as 10h, 2d etc. Allowable units are s (seconds), m (minutes), h (hours), D (days), M (months)	2D

No	Parameter	Description	Example
10	max_complete_time	The maximum time within which the milestone needs to be completed. It is specified as a delay after the completion of any preceding milestone, or as a delay before the expected completion time of the project	sp_004+2D
11	alerts	Specifies one or more roles to send alerts to. By default, alerts are sent to the project manager and team only. Any additional roles need to be explicitly specified. Multiple roles can be specified separated by commas	technical_expert,accounts
12	custom_fields	Specifies any additional data fields that need to be captured for the milestone	-
13	handlers	These are event handler procedures that can be defined for customized action that can be invoked on various events related to the milestone. The following events are generated: complete: event raised when the milestone is completed undo: event raised when the milestone is undone redo: event raised when the mileston is redone	-
14	conditions	These are conditional procedures that are defined for customized pre-conditions for any operation related to the milestone. If defined, the condition procedure is invoked, and if the return value is positive, then the operation is allowed, and if not, the operation is disallowed. A message to the user can also be generated	-

Notes:

- * A compulsary milestone cannot be undone if any following milestone is already completed
- ** A compulsary milestone can be redone even if a following milestone is already completed, but will automatically undo any following milestone that is completed.

5. Activity

On2Biz tracks all activity related to the project, and maintains a history of such activity within each project. The following types of activities are tracked:

Tasks
Tasks are specific actions that are required to be taken.

Each task has the following data entered by the user who creates the task:

- Due Date – the date when the task is to be completed
- Type of task – a customizable menu of options that specifies the type of task
- Description – a textual description of the action to be taken
- Assigned To – one or more users to whom the task is assigned to
- Send Email – If selected, an email alert is sent to the users to whom the task is assigned immediately on creating the task. By default, an alert is sent on the due date of the task. Optionally, alerts can be enabled at a specified delay before the task becomes due
- Sent SMS – Similar to the above, for sending SMS alerts

Any user to whom the task is assigned can enter the following data to update the task:

- Status – Status of the task (pending, done or aborted)
- Completed On – the date on which the task was completed
- Time Spent – the amount to time spent to complete this task
- Progress – Text that indicates the progress done towards completing this task
- Send Email – If selected, an email is sent to the user who created the task, indicating the progress of the task

- Send SMS – if selected, an sms is sent to the user who created the task, indicating the progress of the task

Appointments
Appointments are created to record meetings between the project team and any contact persons associated with the project's associated companies as specified in the Associates section above.

The following data is entered while creating an appointment:
- Date – date when the appointment is due
- Time – time when the appointment is due
- Type – type of appointment, specified as a customizable menu
- Agenda – text indicating the agenda of the meeting
- Send Agenda to attendees – if selected, an email notification is sent to all attendees describing the date and time of the meeting and the agenda
- Attendees (internal) – One or more users who are due to attend the meeting
- Attendees (external) – One or more external contact persons who are due to attend the meeting
- Venue – The location at which the meeting is to be held, selected as a drop-down list of all addresses already associated with any of the associates

The following data is then entered after the meeting is completed:
- Status – Scheduled, completed or cancelled
- Was the objective met? - yes or no – signifies whether the meeting was successful or not
- Time spent in travel – specifies the time spent in travelling to the location
- Time spent in meeting – specifies the time spent for the actual meeting
- Minutes – text for entering minutes of the meeting
- Internal comments – text for entering comments meant for the internal project team only
- Send minutes to attendees? - If selected, the minutes are sent by email to all attendees. The message is editable before sending

Notes
Notes are simple text messages that can be used to record any information related to the project. Each note has the following data fields:
- Comments – text to enter the note
- Tags – a customizable menu of tags that indicate the type of note
- Send as email to project team – if selected, a copy of the note is sent to the project team
- Send as email to contact persons – if one or more contact persons are selected, a copy of the note is sent to the selected persons

Notes are automatically generated by On2Biz to record certain events occur within the project. The following events are recorded as notes:
- When any milestone is completed, the note specifies the date and time as well as the user who completed the milestone
- When any milestone is undone, the note specifies the date, time and user who undid the milestone. In addition, the form data is also captured in the note for reference
- When any milestone is redone, the note specifies the date, time and user who undid the milestone. In addition, the form data is also captured in the note for reference. In case the milestone was compulsary, and any following milestones were already completed, then those milestones are autmatically undone and a note is added to that effect.
- When the project manager is changed from one user to another, a note is added to that effect
- When the project team is edited to add or remove any users, a note is added to that effect

7. Files

The files section contains uploaded files that are related to the project. In addition, On2Biz has a built-in editor to create HTML files by using pre-built HTML templates and modules.

Steps to build a workflow model in On2Biz

The following steps are used to build a workflow model in On2Biz:

Step 1. Workflow Chart

Step 2. Organizational Structure Template

Step 3. Wofkflow Requirements Template

Step 4. Workflow Model Implementation in On2Biz Account

Step 5. User Acceptance Testing

Step 6. Regular Workflow Reviews and Modifications

Step 1: Workflow Chart

The first step while building a new workflow in On2Biz is to create a workflow chart as described previously in this document.

The chart helps all concerned persons to get a common understanding of the workflow, and get agreement on the format.

The chart can be prepared by an On2Biz consultant in co-ordination with various functional heads.

Step 2: Organizational Structure Template

Once the chart is completed, the second step is to provide information about the organizational structure in the form of users and user groups.

The following sample tables illustrate the format in which this information is to be represented.

Groups Table

No	Group ID	Group Name	Group Head*
1	management	Top Management	john_s
2	sales	Sales Division	jill_t
3	europe	Europe Region	jill_t
4	asia	Asia Region	ashok_s

- Create as many rows as necessary
- *Group Head is the user id from the users table below

Users Table

No	User ID	Name	Email	Member Of Groups**
1	john_s	John Smith	John.smith@abc.com	management
2	jill_t	Jill Tiscott	Jill.tiscott@abc.com	sales, europe
3	ashok_s	Askok Srinivas	Ashok.srinivas@abc.com	sales, asia

- Create as many rows as necessary
- **Member of Groups contains comma separated group ids from the groups table above

Step 3: Workflow Requirements Template

Workflow requirements are documented for each of the sections in the workflow model described above. The following tables provide the formats in which the workflow requirements are to be captured.

Associates

No	Associate ID	Associate Description
1	company_1	End Customer
2	company_2	Consultant
3	company_3	Distributor
4	company_4	-
5	company_5	-

Overview

No	Parameter ID	Parameter Name	Parameter Type*	Validation	Compulsary
1	project_title	Project Title	text	-	no
2	description	Project Description	textarea	-	no
3	project_manager	Project Manager	singleuser	-	yes
4	project_team	Project Team	multiuser	-	no
5	start_date	Project Start Date	date	-	yes
6	end_date	Expected End Date	date	end_date>start_date	no
7	custom01	Custom Field 1	text	-	no
8	custom02	Custom Field 2	text	-	no
9	custom03	Custom Field 3	text	-	no
10	custom04	Custom Field 4	text	-	no
11	custom05	Custom Field 5	text	-	no
12	custom06	Custom Field 6	text	-	no
13	custom07	Custom Field 7	text	-	no
14	custom08	Custom Field 8	text	-	no
15	custom09	Custom Field 9	text	-	no
16	custom10	Custom Field 10	text	-	no

*Built-in Parameter Types:

- text – single line of text
- textarea – multi-line of text
- number – numeric input
- date – date selection with calendar
- time – time selection
- singleuser – drop-down menu of users with single selection
- multiuser – multiple user selection
- singleselect – drop-down selection from a list of options
- multiselect – multiple selection from a list of options

Deliverables - Product Categories

No	Category ID	Category Description
1	category_1	Web Site Design
2	category_2	Brochure Design
3	category_3	Multimedia Presentation
4	category_4	-
5	category_5	-
6	category_6	-
7	category_7	-
8	category_8	-
9	category_9	-
10	category_10	-

For each category, a customizable form can be configured by using the following table:

Category Form for Category 1 (duplicate for each category)

No	Parameter ID	Parameter Name	Parameter Type*	Validation	Compulsary
1	value1	Sale Price	number		no
2	value2	Purchase Cost	number		no
3	custom01	Custom Field 1	text	-	no
4	custom02	Custom Field 2	text	-	no
5	custom03	Custom Field 3	text	-	no
6	custom04	Custom Field 4	text	-	no
7	custom05	Custom Field 5	text	-	no
8	custom06	Custom Field 6	text	-	no
9	custom07	Custom Field 7	text	-	no
10	custom08	Custom Field 8	text	-	no
11	custom09	Custom Field 9	text	-	no
12	custom10	Custom Field 10	text	-	no

*Built-in Parameter Types:

- text – single line of text
- textarea – multi-line of text
- number – numeric input
- date – date selection with calendar
- time – time selection
- singleuser – drop-down menu of users with single selection
- multiuser – multiple user selection
- singleselect – drop-down selection from a list of options
- multiselect – multiple selection from a list of options

Milestones

For each milestone, create a table as below:

No	Parameter	Value	Possible values*
1	id	sp003	Any text without spaces max 25 chars
2	title	Lead Captured	Any text max 80 chars
3	help	Unqualified lead. Make sure that atleast one phone call is made before creating a new lead. New leads will be qualified by sales.	Any text max 250 chars
3	type		One or more from below keywords separated by commas: close, success,redo,undo
4	groupid		Any text without spaces max 25 chars
5	role	sales	One or more from below keywords separated by commas: project_manager, project_team, team_manager, category_manager, or any other group_id from the Groups Table in the organization structure section above.
6	undo_role	sales	Same as above
7	redo_role	sales	Same as above
8	compulsary	yes	yes or no
9	max_wait_time	2D	Time units are suiffixed to the numeric value, such as 10h, 2d etc. Allowable units are s (seconds), m (minutes), h (hours), D (days), M (months)
10	max_complete_time	sp002+5D	milestone_id+time or end_date-time
11	alerts		Same as role above
12	handlers	complete=proposal_completed	[event_id]=[procedure_name] where event_id is one of the following events complete, undo, redo and procedure_name is the name of a procedure defined in the workflow configuration script
13	conditions	complete=check_proposal_form	Same as above
14	custom01	Custom Field 1	
15	custom02	Custom Field 2	
16	custom03	Custom Field 3	
17	custom04	Custom Field 4	
18	custom05	Custom Field 5	

- Duplicate this table for every milestone
- *Possible Values column is only for reference and not required in the actual template

Activity - Task Types

No	Task Type ID	Task Type Description
1	task_type_1	Call Customer
2	task_type_2	Prepare Document
3	task_type_3	Address Customer Query
4	task_type_4	Address Technical Issue
5	task_type_5	Address Commercial Issue
6	task_type_6	-
7	task_type_7	-
8	task_type_8	-
9	task_type_9	-
10	task_type_10	-

Activity - Appointment Types

No	Appointment Type ID	Appointment Type Description
1	appt_type_1	Telephone Conference
2	appt_type_2	Meeting
3	appt_type_3	Web Conference
4	appt_type_4	Skype Session
5	appt_type_5	-
6	appt_type_6	-
7	appt_type_7	-
8	appt_type_8	-
9	appt_type_9	-
10	appt_type_10	-

Activity - Notes Tags

No	Notes Tag ID	Notes Tag Description
1	notes_tag_1	Status Update
2	notes_tag_2	Feedback from Customer
3	notes_tag_3	Customer Requirement
4	notes_tag_4	Feedback from Team Member
5	notes_tag_5	-
6	notes_tag_6	-
7	notes_tag_7	-
8	notes_tag_8	-
9	notes_tag_9	-
10	notes_tag_10	-

Step 4: Workflow model implementation in On2Biz Account

Based on the templates provided above, the On2Biz Technical Team will build the worfklow model in the On2Biz account.

Step 5: User Acceptance Tests

The workflow model is tested for accuracy by each functional head, by conducting user acceptace testsfor different workflows.

Step 6: Regular Workflow Reviews and Modifications

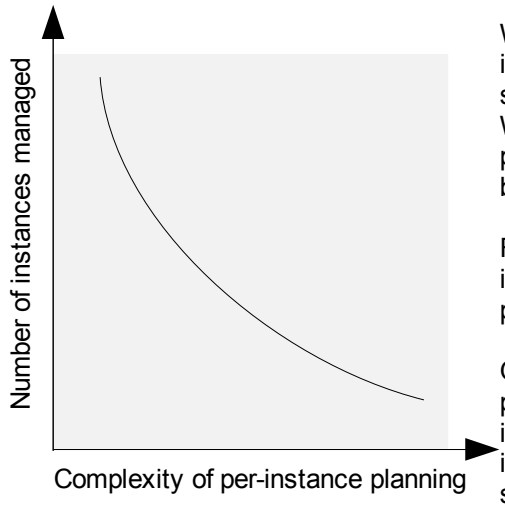
The workflow performance is reviewed on a monthly basis to investigate if any modifications are required. Such modifications are then carried out by the consultant and the technical team.

Appendix: On2Biz is suitable for which workflows?

Types of workflows

Workflows can be categorized based on the following two parameters:

- **Complexity of per-instance planning**
  This parameter signifies how complex is the planning that is required for every individual project that follows the workflow
- **Number of instances managed**
  This parameter signifies the number of projects that can be simultaneously managed by using the same people and resources



When workflows require very complex planning for every instance, it limits the number of instances that can be simultaneously managed by the same people and resources. While for workflows that require very simple or no special planning for every instance, the same people and resources can be used to manage multiple instances.

For example in a large building construction workflow, each individual building instance requires complex planning. The project team usually works on a single project at a time.

On the other hand, in a courier services process, every individual package instance does not require any planning – each instance is processed almost exactly like others, varying only in the instance data. The people working on this workflow can manage several packages simultaneously.

Workflow Management Methodology and Tools

Workflows that have high complexity of per-instance planning require a project management methodology. There are several project management tools that provide for detailed project planning and project execution tracking.

Workflows that require no per-instance planning but where the number of instances managed is large, require a resource management approach, which allows the team to manage all the instances efficiently. Tools for managing such resources are generally database-oriented, and the simple workflows required are usually embedded within the database applications themselves.

However, when workflows require moderate amount of per-instance planning, and where the project teams manage multiple project instances simultaneously, neither project management nor resource planning methodologies or tools are suitable. These workflows do not have high enough complexity of per-instance planning to justify a project management methodology, nor have large enough volume of simultaneous instances managed to require enterprise resource management.

Examples:

- Project sales workflow involving multiple internal departments collaborating on proposals
- Customer support workflow where resolution of issues require frequent participation by multiple departments
- Workflows for built-to-order products or bespoke services – e.g. modular furniture, custom-built engineering products, website design, brochures or marketing campaigns
- Recruitment workflow for professionals that require multiple levels of assesment

On2Biz addresses the needs of such workflows by providing an innovative approach and highly customizable platform.