Manual

Module Administration

Processes, Workflow Variants and Custom Fields

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1. Introduction: processes in myParm

In myParm, every change that has business relevance to a project, a budget or an invoice is carried out through a **process** (in the administration screens called a **workflow**). A process is a fixed sequence of **steps**. Each step is performed by a **role** and may be an **approval** step, in which the responsible person can approve or decline the change.

Key terms used in this chapter:

Term	Meaning
Workflow (process)	A system-defined sequence of steps, e.g. *Initiate project*. The list of workflows and their steps is delivered with myParm. Administrators configure them but cannot create new ones.
Workflow step	One stage of a workflow, e.g. *Project attributes*, *Project structure*, *Approval*. A step has a position, a role, and an *Approval* flag.
Workflow instance	One concrete run of a workflow for one object, e.g. the initiation of project *P-1234*. An instance is *running*, *suspended* (waiting for a person with the required role), *finished* or *aborted*.
Role	A myParm role (see chapter *Roles*). A step can only be executed by employees who hold the step's role.
Custom field	A field defined by the administrator (see section 6). Custom fields are shown inside process steps.
Workflow variant	A named set of custom fields and roles that can be applied to selected project workflows (see section 5). Variants make it possible to run the same process with different fields for different kinds of projects.
PLA	*Profit & Loss Account*: an element of the project structure on which revenues and costs are booked. PLAs have their own status and their status changes run through a workflow.
BL only	*Business Logic only*: a workflow that is never started by a user from a menu. myParm starts it internally when a certain action is performed (currently: *Change PLA status*).

Why administrators configure workflows:

- to decide **which role** is allowed to perform each step of a process, e.g. only an administrator may open a project;
- to display **custom fields** in specific steps, and to set whether they are editable or required;
- to define **variants** of a process, so that, for example, an *Internal project* and a *Customer project* are initiated with different fields and by different roles.

2. Processes available in myParm

All processes are delivered by the system. The list below reflects the current standard installation. Some processes are customer-specific and are only active in the installations that use them. Inactive processes are shown in the Workflows administration page with an empty *Active* check box.

2.1 Project processes

These processes work on a **project** (or on an *idea*, which in myParm is a project in the idea stage).

Process	Purpose	Typical steps	Variants possible
Create idea	Creates a new idea (a project in the idea stage) from the project portal or portfolio.	Idea attributes → Approval	yes
Edit idea	Changes the attributes of an existing idea.	Idea attributes	yes
Promote idea to project	Turns an approved idea into a project.	Project attributes → Approval	yes
Initiate project	Creates a new project: attributes, project structure (WBS), team and approval.	Project attributes → Project structure → Approval	yes
Edit project attributes	Changes the attributes of an existing project.	Project attributes (→ Approval)	yes
Edit project structure	Changes the structure of an existing project (activities, PLAs, milestones).	Project structure (→ Approval)	yes
Change management	Records and approves a change request on a running project (attributes and structure).	Change request → Approval	yes
Reschedule project	Shifts the whole project in time.	Reschedule → (Approval)	no
Cost planning	Plans the distribution of costs on the project structure elements.	Cost planning	no
Revenue forecast	Maintains the revenue forecast of the project.	Revenue forecast	no
Close idea/project	Closes an idea or a project.	Close → (Approval)	no

Process	Purpose	Typical steps	Variants possible
Delete idea/project	Deletes an idea or a project.	Delete → (Approval)	no

The exact step list of each process (which steps exist, which are approval steps) is shown in the Workflows administration page (section 3.2). The steps in the table above are indicative; step names and the presence of approval steps are configured per customer during the initial set-up.

2.2 PLA processes

A **Profit & Loss Account (PLA)** is an activity in the project structure that carries revenues and costs. PLAs are created and edited inside the project processes (*Initiate project*, *Edit project structure*, *Change management*), so there is no separate "create PLA" process. The following processes are specific to PLAs or depend on the PLA status:

Process	Purpose	Notes
Change PLA status	Approves a change of the status of a PLA (for example *open* → *closed*).	Marked **BL only**: the user does not start it from a menu. It is started automatically when the user changes a PLA status in the project structure. The status request goes to the role assigned to the approval step (by default the project leader). The process refuses to close a PLA that still has open obligo, future bookings, invoices in progress, unpaid or overpaid bills, or remaining work in progress / P&L.
Create invoice	Creates an invoice for a project.	The invoice is linked to a PLA of the project.
Delete invoice	Deletes an invoice.	
Invoice reversal	Creates a reversal (credit) of an existing invoice.	
Cash flow	Plans the cash flow of a budget.	Can only be started when the budget's PLA is not closed.
Resource planning	Plans resources on a budget.	Can only be started when the budget's PLA is not closed.
Advanced budget	Creates and approves an advanced	Can only be started when the budget's PLA is not closed.

Process	Purpose	Notes
	budget for a project.	
Create simple budget	Creates a simple budget for a project.	
Fee adjustment	Adjusts fees on a budget.	

2.3 Other processes

Process	Purpose
Edit task template structure	Allows the user to change the structure of a task template (used when creating project structures from templates).

2.4 "BL only" processes

A process marked **BL only** (*Business Logic only*) is never listed in the *Start process* menus of the user. myParm starts it internally when a certain action requires an approval. In the standard installation the only BL-only process is **Change PLA status**. Administrators still see it in the Workflows page and can configure the role of its approval step.

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3. Where and how processes are defined

3.1 Access

The administration page for processes is **Administration** → **Workflows**.

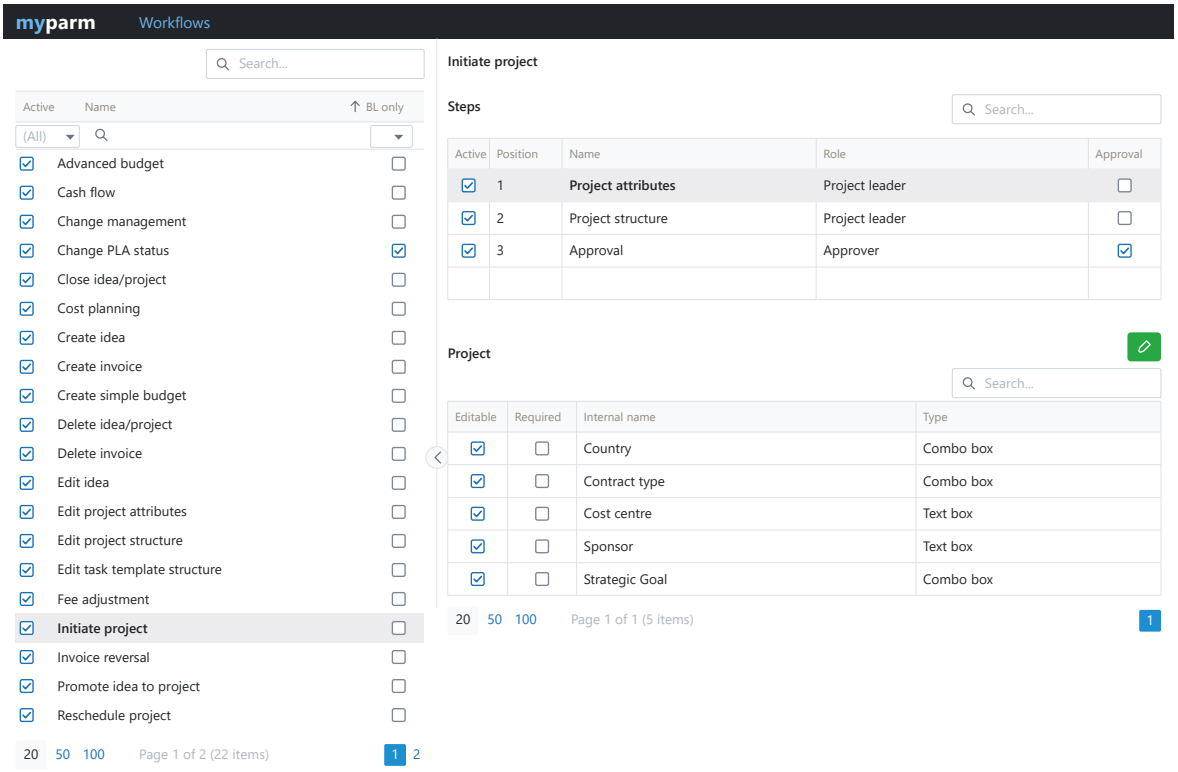
What	Who
Open the Workflows page, change *Allow selection of variants*, assign custom fields to steps	Administrator with the **Workflow management** access right and an Administrator licence
Change the **Role** of a step	**Parm administrator** only. For other administrators the Role column is read-only.
Create or delete workflows, add, remove or reorder steps, define approval rules	Not possible in the user interface. This is done by Parm during the initial set-up of the system.

3.2 The Workflows page

The page has two parts:

- **Left: list of workflows.** Columns *Active*, *Name* and *BL only*, with a search box and filter row. Workflows cannot be added or deleted here.
- **Right: details of the selected workflow.** Panels *Attributes*, *Steps*, and one panel per object type (*Project*, *Activity*) showing the custom fields assigned to the selected step.

Changes are saved with the **Save** button. Unsaved changes are indicated on the page header.



Workflows page with *Initiate project* selected: the workflow list on the left, and on the right the *Steps* grid followed by the custom-field assignment grid for the *Project* object type. The *Attributes* panel sits above the *Steps* grid and is scrolled out of this crop; see section 3.3.

3.3 Attributes panel

Field	Meaning
Active	Shows whether the workflow is active. Read-only.
Allow selection of variants	Shown only for project workflows. When set, the user can pick a workflow variant when starting this process (section 5). Editable by an administrator with the **Workflow management** access right. By default it is enabled for *Create idea*, *Promote idea to project* and *Initiate project*, and disabled for every other workflow.

3.4 Steps grid

Each row is one step. Columns:

Column	Meaning	Editable?
Active	Whether the step is active in this workflow. Inactive steps are skipped when the process runs.	no
Position	Order of the step in the process.	no
Name	Name of the step (translated).	no
Role	Role whose members perform this step. When empty, any user who may start the process can perform the step.	Parm administrator only
Approval	The step is an approval step: the responsible person sees *Save and approve* and *Decline* instead of *Next*.	no

To change a role: select the step, open the *Role* drop-down in the row, choose the role and press *Save*.

3.5 How the configuration is used when a process runs

Understanding the runtime rules helps to configure the roles correctly:

1. **Who can start a process.** The user must hold the **role of the first active step** of the workflow. If that step has no role, anyone can start the process. In addition the process preconditions must be met: for project processes the user must normally be a member of the project team, the project must be open, and no similar process may already be running on the object. Invoice processes can also be started by users with the *Can see all invoices* access right.
2. **Who continues a process.** After a step is completed, the process moves to the next active step. If the current user does not hold the role of the next step, the process is **suspended** and appears in the process list of the users who hold that role. One of them picks it up and continues. If the next step has no role, the same user continues.
3. **Approval steps.** When the process enters an approval step, the approver can **Save and approve** (the process continues) or **Decline**. When declining, the approver selects one of three reasons: *Correction needed* sends the process back to an earlier step, *Reject* stops (aborts) the process, and *Put on hold* suspends it. The decline comment entered by the approver is stored on the instance.
4. **Stop.** A step can be configured so that the executor may stop the whole process (*Stop* button). This is part of the initial set-up.
5. **Variants.** If a variant with roles is involved, the user must additionally hold one of the variant's roles (section 5.4).

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4. Responsibilities: roles in processes

Roles are defined in **Administration → Roles** (see chapter *Roles*). Three kinds of roles play a part in processes:

Kind	Examples	Used for
System roles	*Project leader*, *Team member*, *Approver*, *Administrator*	Delivered with myParm. They are the default roles on process steps: e.g. *Project leader* on *Project attributes* and *Project structure*, *Approver* on *Approval*.
Custom roles	*Portfolio manager*, *Controller*, *Contract manager*	Created by the administrator. They can be put on any step by the Parm administrator, for example to require that only a *Controller* approves a budget.
Variant roles	any role	Assigned to a workflow variant to restrict who can create or edit projects of that variant (section 5.4).

Recommendations:

- Keep the role of the **first step** of a creation process (*Create idea*, *Promote idea to project*, *Initiate project*) as wide as the organisation needs: this role decides who may start creating projects at all.
- Put the narrow roles on the **approval** steps.
- When a step role is changed, running instances continue with the new role from their next step; instances currently suspended on that step become visible to the new role's members.

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5. Workflow variants

5.1 What a variant is and why it is defined

A **workflow variant** is a named configuration that can be attached to the project workflows. It defines:

- the **workflows** the variant applies to,
- the **custom fields** (project and activity fields) that are shown when a process runs under this variant,
- optionally the **roles** allowed to use the variant.

Without variants, every project goes through the same process with the same custom fields. Variants allow one installation to handle several kinds of projects differently while reusing the same system processes. Typical uses:

- **Different project kinds.** *Customer project* shows customer-related fields (*Country*, *Contract type*), *Internal project* shows only *Cost centre* (section 5.7).

- **Simplified processes for small projects.** A *Small project* variant shows only a handful of required fields.
- **Restricting who may create what.** Only members of the *Sales* role may create projects of the *Customer project* variant.

A variant does **not** change the steps of a workflow, the step roles or the approval rules. Those are always the ones defined in the Workflows page. A variant only filters the custom fields shown and restricts the users who may use it.

5.2 Which workflows support variants

Variants can be attached to the following project workflows only:

- Create idea
- Edit idea
- Promote idea to project
- Initiate project
- Edit project attributes
- Edit project structure
- Change management

Other workflows are not offered when adding workflows to a variant.

5.3 Prerequisite: "Allow selection of variants"

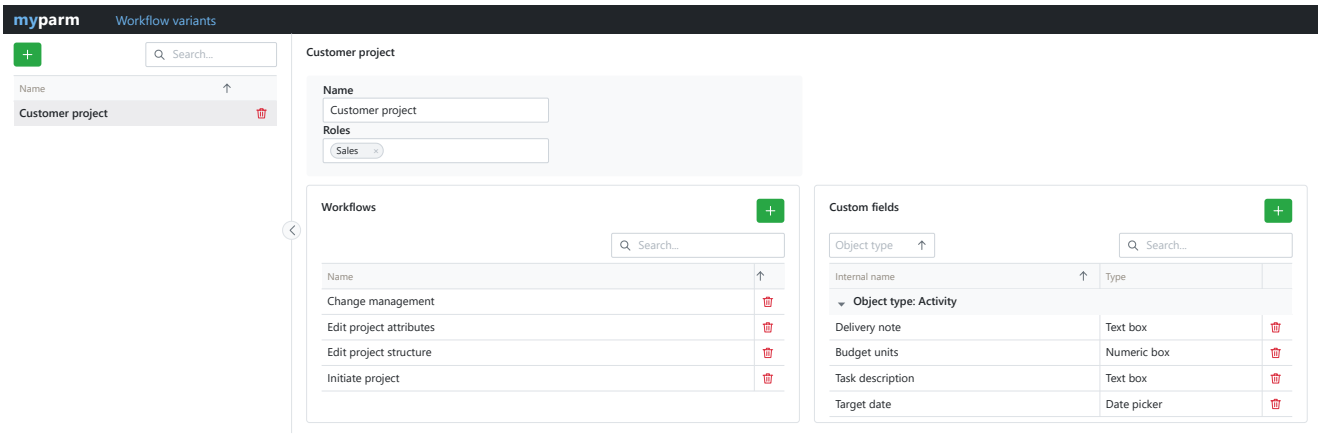
A variant is **chosen** by the user when a process that creates or defines the project is started. Only workflows with the attribute **Allow selection of variants** (Workflows page, *Attributes* panel) offer this choice. By default the attribute is enabled for *Create idea*, *Promote idea to project* and *Initiate project*, and disabled for every other workflow.

A variant that contains no workflow with this flag can never be selected, and the Workflow variants page shows a warning: *Add at least one workflow that allows variant selection to be able to use the variant.* The variant can still be saved despite the warning, but it will never actually be triggered.

5.4 Defining a variant

Open **Administration → Workflow variants** (same access rights as the Workflows page).

- **Left: list of variants** with a *Name* column, search, an *Add* (+) button and a *Delete* (trash) button.
- **Right: details** of the selected variant.



Workflow variants page with the *Customer project* variant selected, showing all four sections of the details panel: *Name*, *Roles*, *Workflows* and *Custom fields*. The *Custom fields* grid is scrolled to its *Activity* group; the *Project* group from the worked example in section 5.7 (*Country*, *Contract type*) sits above it, out of this crop.

Details panel:

Section	What to enter	Rules
Name	Name of the variant as the user will see it, e.g. *Customer project*.	Required, max. 100 characters, must be unique.
Roles	One or more roles whose members may use the variant.	Optional. **If empty, all users may use the variant.** If roles are given, the user must hold at least one of them to start, continue or stop any process running under this variant.
Workflows	The workflows the variant applies to. Press + to open *Add workflows*, tick one or more workflows from the list in section 5.2 and confirm. Remove a workflow with the trash icon (a confirmation is asked).	At least one workflow is required. At least one of them should have *Allow selection of variants* set, otherwise the warning described in 5.3 appears. A workflow that is currently used by a running instance of this variant cannot be removed.
Custom fields	The custom fields shown for this variant, grouped by object type (*Project*, *Activity*). Press + to open *Add custom fields*, tick one or more fields and confirm.	Only **active** *Project* and *Activity* custom fields are offered. The field must also be assigned to the workflow step where it should appear (section 6.3).

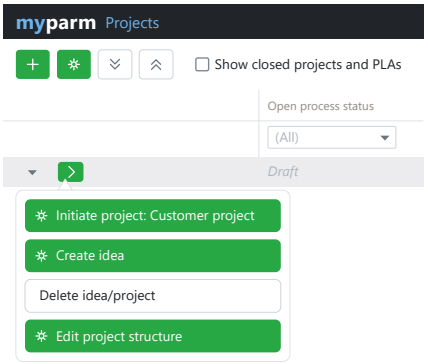
Press **Save** to store the variant.

Deleting a variant: a variant that is used by a running or suspended process cannot be deleted (*Cannot delete the variant, it is being used currently.*). Finish or abort those processes first.

5.5 How a variant is chosen and stored

The variant is not chosen at one single fixed step. The user is asked to pick a variant only at the **first** workflow that is both included in the variant and flagged *Allow selection of variants* (section 5.3), reached while the idea or project does not yet have a variant.

1. **When creating an idea or a project.** In the portfolio the *Create project* (and *Create idea*) button opens a menu with one entry per variant the user may use. The user selects the variant, and the *Initiate project* (or *Create idea*) process starts under that variant. If no variant is offered at this point (no variants exist, or none is available to the user), the process starts without a variant, and the choice may still be offered later, at the next workflow that qualifies.
2. **From the project's process button.** For a project that has **no variant yet**, the process menu lists one entry per variant for each workflow with *Allow selection of variants*, in the form *Workflow name: Variant name*. For a project that **already has a variant**, only the processes of that variant are listed (processes not covered by the variant are shown without a variant). A variant the user may not use — because of its own *Roles* (section 5.4) or because the user lacks the role the workflow itself requires — is left out of the menu entirely; it is never shown disabled.
3. **Storing.** As soon as the user chooses a variant, it is stored **permanently on the project** and locked: the user is never prompted again for that object, and every later process of that project that is part of the variant (*Edit project attributes*, *Edit project structure*, *Change management*, …) automatically runs under the stored variant. A project's variant cannot be changed afterwards in the user interface. A workflow that is not part of the variant always runs in standard mode; a workflow that is part of the variant runs in standard mode until the object acquires a variant, and in variant mode from then on.
4. **Import.** When projects are imported from a file, the column *WorkflowVariantName* sets the variant of the imported project. An unknown name is reported as *Workflow variant not found*.



Project process button opened for a project that has no variant yet: *Initiate project* carries its variant qualifier, *Initiate project: Customer project*, while *Create idea* and *Delete idea/project* are not covered by the variant, and *Edit project structure* is covered but not flagged *Allow selection of variants*, so all three are listed without one.

5.6 What the variant changes while a process runs

- **Custom fields.** In every step of a workflow covered by the variant, only the custom fields that are assigned to the step **and** belong to the variant are shown (section 6.3).
- **Required fields.** The check that all required custom fields are filled in only considers fields that belong to the variant.
- **Roles.** Users without one of the variant's roles cannot start or continue the process.
- **Display.** The variant name is shown in the process header and in the process buttons, so the user always knows which variant is running.

5.7 Example: two kinds of projects

Goal: customer projects need the fields *Country* and *Contract type*; internal projects need *Cost centre* only; only the *Sales* role may create customer projects.

1. Create the custom fields *Country*, *Contract type* and *Cost centre* for the object type *Project* (section 6.1).
2. In Workflows → *Initiate project* → step *Project attributes* → *Project* panel, assign all three fields, set them *Editable* and, where needed, *Required* (section 6.2). Do the same for *Edit project attributes* so the fields can be edited later.
3. Make sure *Initiate project* has *Allow selection of variants* set.
4. Create the variant **Customer project**: roles *Sales*; workflows *Initiate project*, *Edit project attributes*, *Edit project structure*, *Change management*; custom fields *Country*, *Contract type*.
5. Create the variant **Internal project**: no roles; same workflows; custom field *Cost centre*.
6. In the portfolio, users now choose *Customer project* or *Internal project* when creating a project. A member of *Sales* sees both entries, other users only *Internal project*.

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6. Custom fields

6.1 Defining custom fields

Custom fields are defined in **Administration** → **Custom fields**. A custom field belongs to exactly one **object type**:

Object type	Where the values are stored / shown
Project	Project attributes (*Custom fields* panel), portfolio
Activity	Activities and PLAs in the project structure
Employee	Employee administration page
Contract	Contract administration page

The list is grouped by object type and has the columns *Active*, *Internal name*, *Type* and (if groups are defined) *Group*. The toolbar contains the + button with the list of field types, the reorder button and a search box.

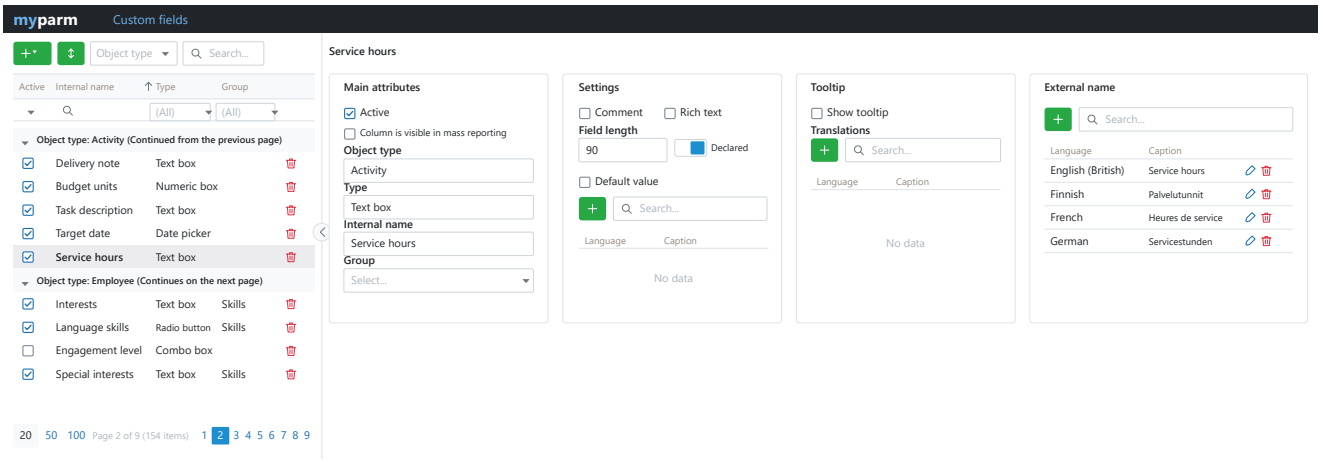
Field types that can be created:

Type	Use	Settings
Check box	Yes/no value	*Checked by default*
Combo box	Single choice from a drop-down list	List of values; each value has a *Reported value* (stored value, max. 256 characters, unique, cannot be changed after saving), a *Default* flag and a caption per language
Radio button	Single choice shown as radio buttons	As Combo box
Date picker	Date	none
Identifier box	Short code / identifier	*Field length* (default 10)
Numeric box	Number	*Unit* (none, currency, user defined), integer part length (default 15), number of decimals (default 0)
Text box	One-line text (or rich text)	*Comment* (multi-line), *Rich text*, *Field length* (default 40), *Default value*
Text block	Static text shown as a label, no input	*Bold*
Traffic light	Manually set red/yellow/green indicator	*Drill-down URL* (hyperlink; parameters `#ObjectId#` and `#ObjectNo#` can be used)
Value based traffic light	Numeric value shown as a traffic light	Numeric box settings plus *Warning level*, *Critical level* and *Drill-down URL*

Main attributes of a custom field:

Attribute	Rules
Active	Only active fields are shown in processes and can be assigned to steps or variants. Deactivate a field instead of deleting it when it already holds values.
Object type	Required; read-only after the first save.
Internal name	Required, max. 128 characters, unique per object type, read-only after the first save. Only letters, numbers, underscores and spaces; must start with a letter. The internal name is used in the administration screens and in reports.

Attribute	Rules
External name	Caption per language shown to users. If none is given, the internal name is shown.
Tooltip	*Show tooltip* plus a caption per language. Shown as an info icon next to the field.
Group	Optional custom field group (Administration → Custom field groups). Fields of the same group are shown together in the *Custom fields* panel.
Column is visible in mass reporting	*Activity* fields only: makes the field available as a column in mass reporting.



Custom fields page: the grouped, paginated list on the left (the *Activity* group continued from the previous page, then the start of the *Employee* group; *Engagement level* illustrates an inactive field), and on the right the details of the selected *Service hours* Text box — *Main attributes*, *Settings*, *Tooltip* and *External name*, the last two each with a *Language* / *Caption* grid.

6.2 Assigning custom fields to process steps

A custom field is shown to the user only when it is **assigned to a workflow step**. The assignment is made per step and per object type.

1. Open **Administration** → **Workflows** and select the workflow (e.g. *Initiate project*).
2. Select the step (e.g. *Project attributes*). On the right, one panel per object type supported by the step appears (*Project*, *Activity*) listing the fields already assigned, with the columns *Editable*, *Required*, *Internal name* and *Type*.
3. Press the green **Edit** (pencil) button of the panel. The page **Custom fields assignment – *step name* (*object type*)** opens.
4. Press +. The dialog *Add new custom field* lists all active fields of that object type not yet assigned. Select one and confirm with **OK**. The field is appended at the last position.
5. Select the field in the list and set:

- **Editable** – the user can enter a value in this step. When off, the field is shown read-only.
- **Required** – the user must enter a value before the step can be completed. *Required* can only be set when *Editable* is set; clearing *Editable* also clears *Required*.

6. Use the reorder button to change the **Position** (order in the *Custom fields* panel). Reordering is only possible when there are no unsaved changes.
7. Press **Save**. Use the **Back** arrow to return to the Workflows page.

Fields are removed from a step with the trash icon. Removing an assignment does not delete the values already stored on projects.

Which object types can be assigned to which steps is defined during the initial set-up. In the standard configuration:

Workflow / step	Object types
Initiate project → Project attributes	Project
Initiate project → Project structure	Project, Activity
Edit project attributes	Project
Edit project structure	Project, Activity
Approval and Change management steps	Project, Activity

Employee and *Contract* custom fields are not assigned to workflow steps at all: they are simply shown on the Employee and Contract administration pages.

The assignment belongs to the **step definition**. Steps that are shared between workflows (for example the same *Approval* step used by several workflows) share their custom field assignment.

6.3 Using custom fields in variants

A workflow variant does **not** have its own *Editable* / *Required* / *Position* settings. The variant acts as a **filter** on top of the step assignment:

Situation	Fields shown in the step
Project without variant (or workflow not covered by the project's variant)	All fields assigned to the step
Project with variant	Fields assigned to the step **and** contained in the variant

Consequences for the administrator:

- A field must be **both** assigned to the step (section 6.2) **and** added to the variant (section 5.4) to appear for that variant. A field that is in the variant but not on the step is not shown; a field that is on the step but not in the variant is hidden for that variant.
- *Editable*, *Required* and the position always come from the step assignment. If a field must be required for one variant and optional for another, create two fields (for example *Contract type (customer)* and *Contract type (internal)*) and put each into its own variant.
- Only *Project* and *Activity* fields can be part of a variant. *Contract* and *Employee* fields are never filtered by variants.
- Fields that are required on the step but not in the variant are ignored by the required-fields check for that variant.

Checklist to make a custom field appear in a process for a given variant:

1. Custom field exists and is **Active**.
2. Field is assigned to the **step** with *Editable* (and *Required* if needed).
3. Field is added to the **variant**.
4. The workflow is in the variant's **Workflows** list.
5. At least one of the variant's workflows has **Allow selection of variants**, and the project has acquired that variant.

6.4 What the user sees

In the process step the assigned fields appear in the **Custom fields** panel (for project attributes on the right-hand side of the page), ordered by *Position* and grouped by custom field group.

- Default values (*Checked by default*, default combo/radio value, default text) are applied when the object is **created**; when editing an existing object the stored values are shown.
- Read-only fields (*Editable* off) are displayed but cannot be changed.
- Required fields are validated when the user tries to complete the step. A field that is not editable is never enforced as required.
- The tooltip icon is shown when *Show tooltip* is set. Rich text boxes have an expand icon that opens a larger editor.

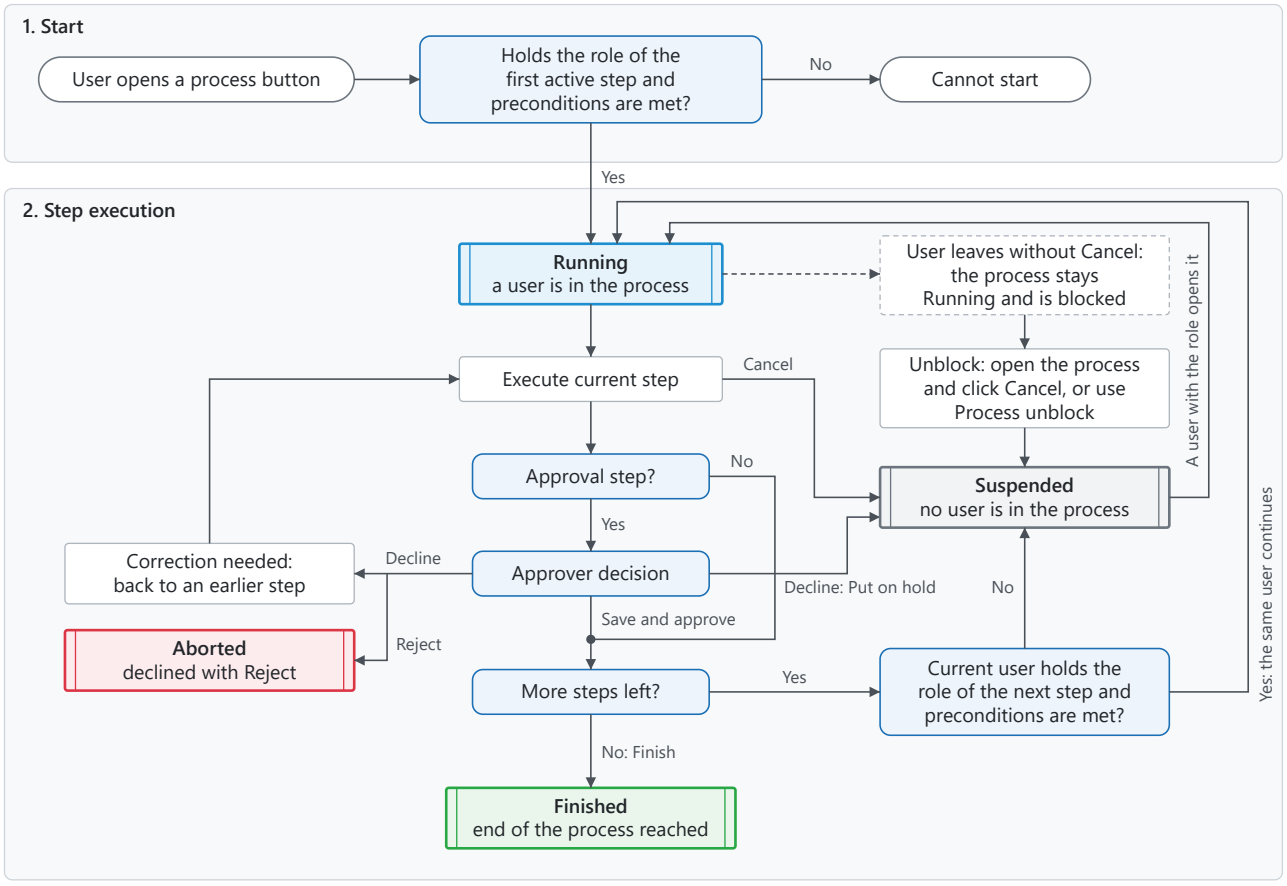
7. Process flow diagrams

7.1 Process lifecycle

A process instance, from the process button to its final state. The instance is always in one of four states:

- *Running* – a user is in the process.
- *Suspended* – no user is in the process: the user clicked *Cancel*, the next step belongs to another role, or the approver declined with *Put on hold*.
- *Aborted* – the approver declined the process with *Reject*.
- *Finished* – the process engine reached the end of the process, with or without an approval step.

If a user leaves the process without clicking *Cancel*, the process stays *Running* and is blocked. It can only be unblocked by opening the process and clicking *Cancel*, or with *Process unblock*.



7.2 Variant selection

How a variant is chosen, and whether a workflow runs in variant mode or standard mode (section 5.5), in two situations: creating a new idea or project (A), and changing an existing one (B). In both, a variant is only available to a user if it has no roles assigned or the user holds at least one of its roles (section 5.4).

