LATITUDE

Professional Practice Management Software

Latitude WorkFlow Guide

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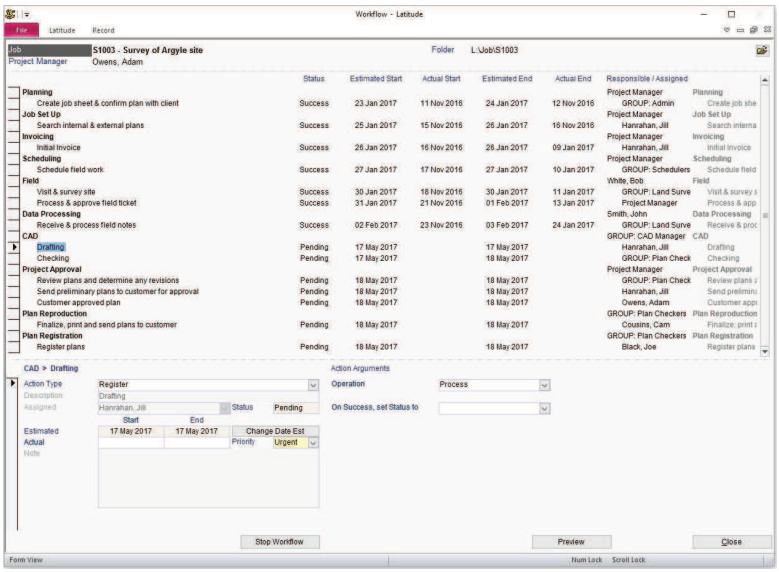
1 U: Workflow (Corporate Edition Only)

1.1 Overview

1.1.1 Latitude Workflow is used to drive your business. With integrated Workflow, you can automate a business process, in whole or part. You only need to map out the flow of your business processes into Steps and Actions, and Latitude turns them into a live process executed in sequential order. Workflow executes various functions automatically, from simply opening a screen for data entry to functions as complex as creating a work log based on a schedule with all the required project information already filled in. Each business process can be assigned to a "role", that can either be one of your existing business organizational groups (setup as a Latitude Notify Group) or a built-in group role such as Project Manager. See "How do I handle Reminders and Notifications" -> "Assignments" to learn how "role assignments" work.

Large organizations have business processes that involve staff from different departments that must be coordinated to deliver a service to the customer. With Latitude Workflow, some of these business processes can be broken down and mapped to Steps such as Planning, Job Setup, Scheduling, Site Visit, Data Processing, Drafting, Project Approval, etc. Each of these Steps is further broken down into a series of Actions to be completed, for example, the Project Approval Step may consist of actions such as: review plans, send preliminary plans to customer, customer approves plan, etc.



1.2 Benefits of Latitude Workflow

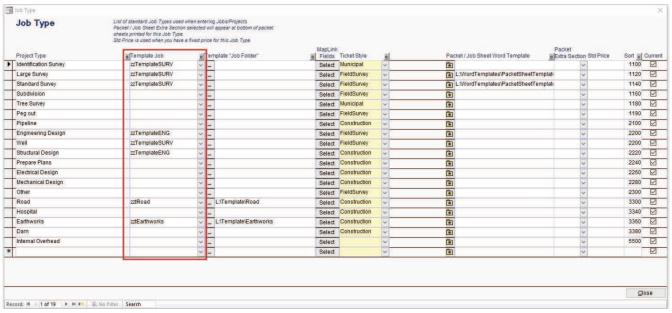
1.2.1 Shows who is assigned to perform work, the target date and what action is to be performed.
Improves process visibility and allows you to instantly see current status.
Work is assigned to staff with appropriate skills.
Management can concentrate on strategic business oriented activity rather than day-to-day operations.
Constantly moves work through the organization as work is immediately passed on to the next person and cannot be lost or forgotten.
Identifies critical processes and helps simplify steps or actions need when designing new workflows.

1.3 Getting Started

1.3.1 Make a list of the types of jobs (maps to Latitude Job Types) your business has.

NOTE:

You may also need to include sub-types of "Job Types" (maps to Latitude Task Type)



Break each "Job Type" down into small isolated single work processes

Each single work process should be a finite, repetitive procedure with a specific beginning, middle and end.

These become the Steps of your workflow.

Break each "Step" down into as many discrete activities as possible, the more granular, the better.

These activities are actions your employees need to do to complete the step.

These would become the Actions of your workflow.

NOTE:

Action granularity on a particular step works best when each action is assigned to a different person performing different roles. When these 'actions' start to become too detailed and are only assign to one role, it may be best to just create a single action and use register item notifications to run them. "Follow-ups" are one example you don't need actions for. It may be best to just create a register item notification to remind an employee (or group of employees with the same role) to follow-up something at a later date, see "How do I handle Reminders and Notifications" -> "Register Item Notifications".

1.3.2 Workflow Example

A "Survey" job type may have the following workflow:

- Step 1 - Job Set Up
  - Action 1.1 - Determine completion date
  - Action 1.2 - Compile project information
- Step 2 - Field Operations
  - Action 2.1 - Schedule crews
  - Action 2.2 - Log field work
  - Action 2.3 - Approve field work
- Step 3 - Drafting
  - Action 3.1 - Compile and process project data
  - Action 3.2 - Complete drafting plans
  - Action 3.3 - Validate plans
  - Action 3.4 - Deliver documents and register plans
- Step 4 - Invoice
  - Action 4.1 - Send invoice
  - Action 4.2 - Get paid

Action 4.3 - Close job

1.4 Set Up Workflow Templates & Configuration

1.4.1 Once you have determined all the job types and their corresponding workflows exist in your company, you can start configuring Latitude "Template Workflows"
NOTE:
At the onset of implementing Latitude Workflow in your company, have a Latitude consultant contact you with a structured spreadsheet ready for you to fill with your job types and workflows.
After you have filled them in, send them to your Latitude consultant for them to handle the initial configuration for you.

1.4.2 Template Workflows
These are entered in template jobs the same way as you enter workflow in a regular job or task.

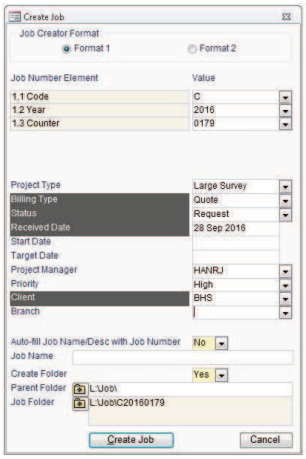
To configure,
Enter a "Template Job"
Select a "Business Contact" where you typically enter your own internal jobs (this is usually your own company's record in Latitude)
NOTE:
Your Latitude database should already have a business contact setup for your company.
If you can't find it, you need to create one.
In the "Business Contact" screen, click the "Job" tab and then click the "New Job" button
A "JobCreator" dialog appears
Tick "Format 2"
NOTE: The JobCreator Format2 is typically configured to allow entering "freeform" job number formats. If you have not configured one, you may need to use your own job number format and not follow the convention suggested below.
Enter the template job number and click "Create Job"
NOTE:
By convention (though not strictly required), prefix the template job number with "zzt" to help you distinguish a template job from a regular job.
In the above workflow example, you may call the template job "zztSurvey".
If your template job contains tasks that will have different independent workflows, create the template workflow in the Task -> Workflow tab

Link the "Template Job" to the "Job Type"
Go to Ribbon -> Lookup Tables -> click "Job Type"
Enter a new job type, eg. "Survey"
In the "Template Job" column, select the template job to link, eg. "zztSurvey"

Enter the workflow into the template job
Go to "Business Contact" -> Job -> double-click the template job
In the Job screen, click the "Workflow" tab

1.4.3 Standard JobCreators

JobCreators automatically fill the workflow section of a new project from the corresponding template job as a new project is created. They use the "Job Date" to set the estimated start date of the first workflow step and then use the relative date offsets in the template workflow to set the dates for subsequent actions in the workflow. If the template job contains tasks with workflows, they are also copied to the new job.



1.5 Workflow Screen

1.5.1 There are 3 ways to access this screen:

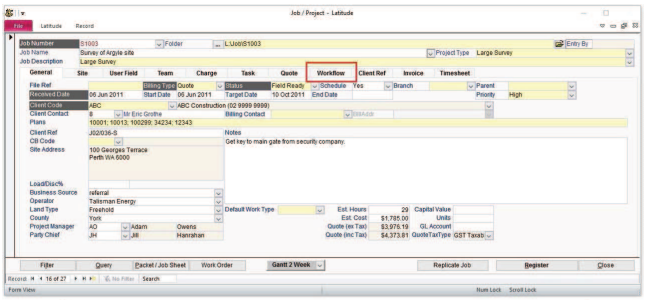
In the Job screen -> click the Workflow tab.

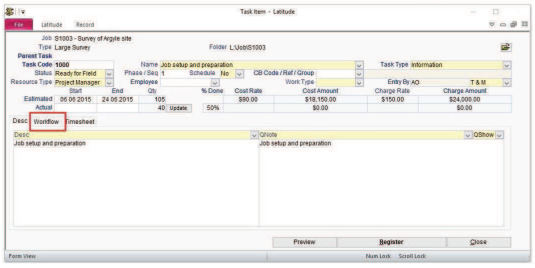
This must be used if the job only follows one business process where all steps must be performed sequentially (ie. A step must be finished before the next step is performed). Changes in the workflow as the job progresses is also supported.

In the Job screen -> click the Task tab -> double-click a task to open -> click the Workflow tab

This must be used if the job will have multiple independent business processes that must be performed simultaneously. This is done by dividing the business processes into tasks that then allows creating separate workflows. Dependent workflows are not yet supported.

In the Notifications screen -> double-click the description of a workflow notification item


Job / Project - Latitude
Job Number S1003
Job Name Survey of Argyle site
Job Description Large Survey
Folder L:\Job\S1003
Project Type Large Survey
General Site User Field Team Charge Task Quote Workflow Client Ref Invoice Timesheet
Client Code ABC
ABC Construction (02 9999 9999)
Client Contact Sir Eric Grothe
Plans 10001; 10013; 100299; 34234; 12343
Client Ref J02/036-8
CB Code
Site Address 100 Georges Terrace Perth WA 6000
Notes
Get key to main gate from security company.
Business Source referral
Operator Talisman Energy
Land Type Freehold
County York
Project Manager AO Adam Owens
Party Chief JH Jill Hanrahan
Default Work Type
Est. Hours 20
Est. Cost $1,785.00
Quote (ex Tax) $3,976.19
Quote (inc Tax) $4,373.81
Capital Value
Units
GL Account
Filter Query Packet / Job Sheet Work Order Gantt 2 Week Replicate Job Register Close
Form View


Task Item - Latitude
Job S1003 - Survey of Argyle site
Type Large Survey
Folder L:\Job\S1003
Parent Task
Task Code 1000
Name Job setup and preparation
Task Type Information
Status Ready for Field
Phase / Seq 1
Schedule No
CB Code / Ref / Group
Resource Type Project Manager
Employee
Work Type
Entry By AO
T & M
Start End Qty % Done Cost Rate Cost Amount Charge Rate Charge Amount
Estimated 06 05 2015 24 05 2015 105 $90.00 $18,150.00 $150.00 $24,000.00
Actual 40 Update 50% $0.00 $0.00
Desc Workflow Timesheet
Desc
Job setup and preparation
QNote
QShow
Job setup and preparation
Preview Register Close
Form View

1.5.2 Summary View

The top half of the screen displays Steps and Actions belonging to a job. It includes the names of each step and action, estimated & actual start and end dates, and the responsible role that manages each step and the staff assigned to perform each action.

To add or change a workflow item, right-click any workflow summary line item to see the operations menu:

Add Step - Displays a new empty detail section at the bottom of the screen ready for you to enter a new step. When saved, a new step is added to the end of the workflow.

Add Action - Displays a new empty detail section at the bottom of the screen ready for you to enter a new action. When saved, a new action is added to the end of the step that has focus.

Insert Workflow... - Allows you to copy workflow steps and actions from a another job. Displays a screen for you to pick a job and the steps & actions you want to copy from it

In the "Insert Workflow" screen,

Click to toggle "Exclude" or "Include" on the "yellow" column. Clicking a step excludes or includes all actions belonging to it

By default, all steps and actions are included. Click the "Exclude All" button to exclude all and pick only those steps and actions you want to copy

Click the "Insert" button to insert the selected steps and actions above the workflow step that has focus

Change Date Est... - Opens the "Change Start and End Date Estimates" dialog screen

Copy Step - Copies a step and its actions to the clipboard.

Paste Step - Inserts the copied step and its actions above the step that has focus.

Move Up - Moves the step or action up.

Move Down - Moves the step or action down.

Controls located at the bottom of the screen:

Start Workflow at Step dropdown - Pick which step to start the workflow.

NOTE:

This will clear all actual start & end dates of later actions starting from the selected step and set their statuses back to 'Pending'.

This function is unavailable when entering a template workflow.

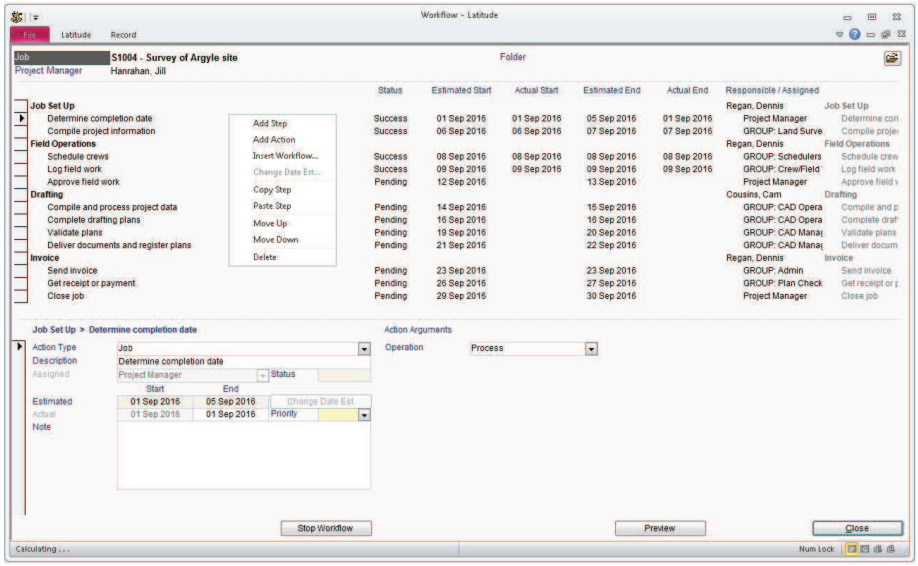
Start/Stop Workflow button - Starts or stops the workflow.

NOTE:

This function is unavailable when entering a template workflow.

Preview button - Displays a report with a list of workflow items with their statuses, estimated dates, actual dates and employee assignments.

Close button - Closes the workflow screen.


Workflow - Latitude
File
Latitude
Record
Job
S1004 - Survey of Argyle site
Project Manager
Hanrahan, Jill
Folder
Status
Estimated Start
Actual Start
Estimated End
Actual End
Responsible / Assigned
Job Set Up
Determine completion date
Compile project information
Field Operations
Schedule crews
Log field work
Approve field work
Drafting
Compile and process project data
Complete drafting plans
Validate plans
Deliver documents and register plans
Invoice
Send invoice
Get receipt or payment
Close job
Add Step
Add Action
Insert Workflow...
Change Date Est...
Copy Step
Paste Step
Move Up
Move Down
Delete
Success
Pending
01 Sep 2016
06 Sep 2016
08 Sep 2016
09 Sep 2016
12 Sep 2016
14 Sep 2016
16 Sep 2016
19 Sep 2016
21 Sep 2016
23 Sep 2016
26 Sep 2016
29 Sep 2016
05 Sep 2016
07 Sep 2016
13 Sep 2016
15 Sep 2016
20 Sep 2016
22 Sep 2016
27 Sep 2016
30 Sep 2016
Regan, Dennis
Project Manager
GROUP: Land Surve
Cousins, Cam
GROUP: Schedulers
GROUP: Crew/Field
GROUP: CAD Opera
GROUP: CAD Manag
GROUP: Admin
GROUP: Plan Check
Job Set Up > Determine completion date
Action Type
Job
Description
Determine completion date
Assigned
Project Manager
Status
Start
End
Estimated
Actual
Change Date Est
Priority
Note
Action Arguments
Operation
Process
Stop Workflow
Preview
Close
Calculating . . .
Num Lock

1.5.3 Detail View

The bottom half of the screen displays details of the step or action selected in the top half of the screen. These details can be edited here.

Steps contain the following fields:

Description - Description of the step.

Responsible Role - The role responsible for managing actions that are declined by all staff who can perform the role it was assigned. The responsible person must then reassign the declined action in order for the workflow to continue.

On Success, set Status to - Sets the job or task status to this value when all actions under the step are completed (ie. Action status = "Success")

Actions contain the following fields:

Action Type - The (usually) screen to be opened when the assigned person accepts the action. Available "Action Types" include:

Field Ticket - Opens a work log ready for data entry (or if the action is already linked to a field ticket, it opens that field ticket).

Job - Opens the job screen for data entry.

Job Filter - Opens the job filter screen ready for searching.

Register - Opens the register screen for data entry.

Action - Opens the workflow screen with the action in focus ready for data entry.

Scheduling - Opens the scheduler screen ready for scheduling field staff and crews.

Task - Opens the task screen ready for data entry.

Invoice - Opens the invoice screen ready for data entry.

Manual - Does not open a screen. To close the action, right-click the action item and click the "Complete" menu item.

When the screen automatically opened when the workflow action was accepted is closed, Latitude prompts the user to confirm whether their work on the action is finished or not. If they click "Yes", the next action is automatically started. If they click "No", the status of the current action remains as "Started" and the action also remains on their notification list until they flag it as closed (complete).

Description - Description of the action.

Assigned Role - The role who is to perform the action. When one member of a role accepts an action, the action disappears from the notification list of all other members. If all members of a role decline an action, it returns to the responsible role's notification list.

Estimated Start Date - When the action is estimated to start.

Estimated End Date - When the action is estimated to end. If this is set, notifications change color depending on how close to (or past) this date they are (see Set Up Workflow Templates & Configuration -> Action Dates and Alert Period Colors).

Change Date Est - When clicked, opens the "Change Start and End Date Estimates" dialog

Actual Start Date - The date the action is accepted by an employee. This is automatically set when the action is accepted in the notification list which also changes the action's status to "Started".

Actual End Date - When the action is completed by an employee. This is automatically set when an employee closes (completes) an action which also changes the action's status to "Success".

Priority - Optional. Determines the rank of an action in the notification list when sorted by "Priority"

To configure, see Ribbon -> Lookup Tables -> More -> pick "Priority" (if it's not there, type "Priority" to add it)

Code - the numerical weight of the priority, 1 being the lowest to 9 the highest, eg. 1 - Low, 2 - Normal, 3 - High

Note - Optional. Additional details about the action.

Status - Read only. Shows the current status of the action.

NOTE:

Do not confuse this status with other Latitude statuses as they work independently with each other.

For example, when a job has a job status of "Closed" it is up to the project manager to end the workflow manually. This is so as even the job is closed, you can still perform actions to finalize the job eg.

archive paper files. To automatically set the job or task status when a step or action progresses, see "On Success, set Status to".

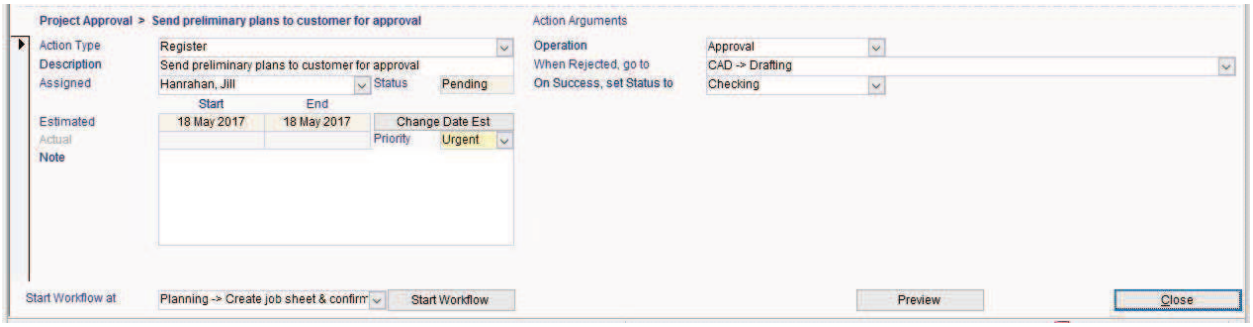
On Success, set Status to - Sets the job or task status to this value when the action is completed (ie. Action status = "Success")

Operation - Controls branching of a workflow. If an action is not approved, the workflow branches to a different path rather than automatically moving on to the next action in the workflow.

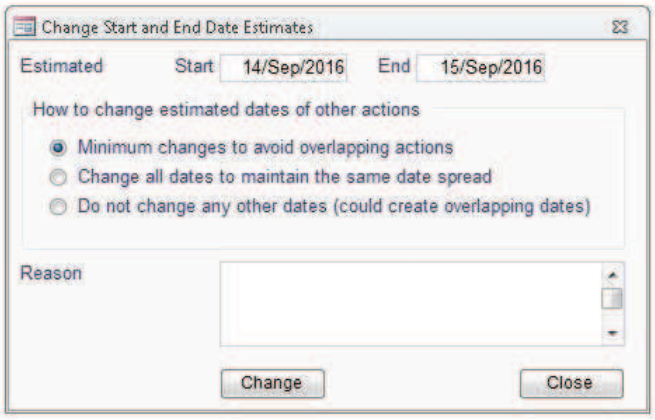
Set to "Process" if the assigned employee only needs to indicate they have finished work on the action to close (complete) it, after which the workflow automatically proceeds to the next action or step.

Set to "Approval" if the assigned employee checks work done in prior action(s) and then needs to approve or reject it. If approved, the workflow automatically proceeds to the next action or step. If rejected, the workflow branches to perform a different action elsewhere in the workflow.

When Rejected - the action to perform when an action is rejected.



1.5.4 Change Start and End Date Estimates Dialog



A popup dialog that allows changes to the start & end date estimates with options on how it affects the estimated dates of other actions.

Options are:

Option 1 - Minimum changes to avoid overlapping actions - moves the current action's estimated dates closer to the dates of adjacent actions until the gap between the current and adjacent action estimated dates become zero (0). If the gap is already zero, it squeezes the duration of the adjacent action estimated dates until the current action estimated dates fits in the timeline.

Option 2 - Change all dates to maintain the same date spread - changes all estimated dates of adjacent actions so they become closer but it does not change the duration of each action.

Option 3 - Do not change any other dates - leaves estimated dates of adjacent actions unchanged. This also allows you to have actions with overlapping dates.

NOTE:

Having overlapping dates does not cause Latitude to execute multiple actions in a workflow in parallel (simultaneously) as actions are always executed in sequence one at a time.

Reason - Reason - Optional. Text entry on why the estimated dates were changed.

NOTE:

When entering a template workflow, enter the estimated start & end dates based on an "ideal" project cycle you would like to be able to follow..

1.5.5 Action Dates and Alert Period Colors

Workflow estimated and actual dates only serve as an indicator to track the workflow action schedule and for statistical analysis of performance. They are NOT used to control when an action is triggered, or to set its importance. As an example, if you have a 'field work' Action estimated to last 5 days but the actual field work is finished in 3 days, the workflow will proceed to the next action ahead of your estimated schedule.

Indicate action urgency in the Notification screen with color

Color actions ready to be done (green), due now (orange) or overdue (red) based on the number of days to, or past their estimated end dates.

Go to Setup -> Notify -> Workflow

On Time/Not Due Just Yet (Green) - if you consider an action as being not due yet, up until the day before its estimated end date, enter "1", if only up to two days prior to its estimated end date, enter "2", if only up to three days prior, enter "3", etc.

Due Now (Orange) - to warn staff that the action is due immediately if it isn't to be late on its estimated end date enter "0", if you want this warning color to start the day before the estimated end date enter "1", if from 2 days prior to the estimated end date enter "2" etc.

Overdue (Red) - if you consider an action overdue from the day after its estimated end date enter "-

1", if it isn't overdue until two days past its estimated end date enter "-2", if it isn't overdue until three days past its estimated end date enter "-3", etc.

1.5.6 Workflow Permissions

Workflow has inbuilt security that allows you to give groups of users different levels of access (from general to specific access):

Object security - find the "frmWorkflow" object and set a letter (indicating read/write permission) or a number (indicating read-only permission) to be able to give those rights to users.

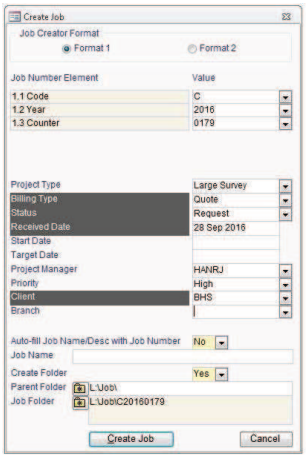
A project manager always has full authority over their project/task's workflow - they can create, modify, delete, start and stop the workflow at any time.

The responsible role assigned to a step has the full authority over the step and all actions under it - they can create, modify, delete, reassign and end actions at any time.

The role assigned to an action has limited authority over the action - they can enter notes, dates, run the screen associated with the action and can end the action.

1.6 Starting Workflow

1.6.1 Go to "Business Contact" screen -> click "Job" tab -> click "New Job" button



When the "JobCreator" dialog appears,

Fill all required fields and any others you need.

In the "Job Type" dropdown, pick the type of job you want to create. This will then fill the job with the template workflow from the corresponding template job you created in "Set Up Workflow Templates & Configuration".

NOTE:

The "Job Date" sets the estimated start date and is the basis for using relative offsets to calculate and fill all estimated dates in all actions in the workflow.

Click "Create Job"

When the "Job" screen displays the newly created job,

Go to the "Workflow" tab or "Task -> Workflow" tab

Review the Workflow in the summary section in the upper half of the screen

Add, change or delete workflow steps

Verify and adjust estimated start and end dates

Verify and reassign roles when necessary

When you are done,

Nominate a step to start the workflow at in "Start Workflow at Step"

Click "Start Workflow"

1.7 Notifications

1.7.1 Workflow uses "My Notifications Latitude View" to tell staff what actions they have been assigned. See "How do I handle Reminders and Notifications".

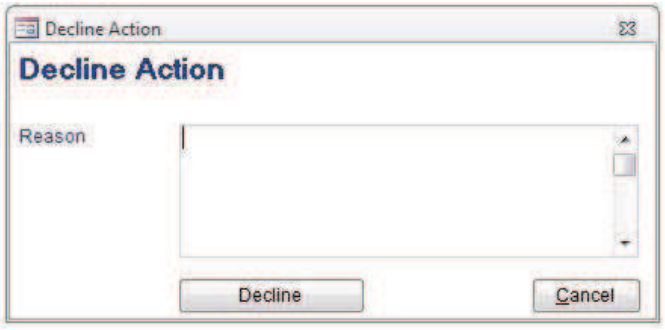
1.7.2 Workflow Notification

This screen displays workflow items that match the following criteria:

All actions assigned to the user (who is currently logged in) that are pending or have been accepted and started

All actions that have been declined by other staff where the user (who is currently logged in) is the responsible person of the step the action belongs to

Note, estimated dates DO NOT cause workflow items to appear in the notification screen. Workflow items are only triggered by the previous step or action being completed irrespective of whether their estimated date is past or not.



Description field - right-click mouse button to see menu. Menu options are:

Accept - Sets the action status to "Started" and executes the function linked to the action (usually opening a screen). When an action is assigned to a group, only one member of the group can accept it. This works in a "first-come first served" basis. When a member accepts an action, Latitude stops notifying any other members of the group.

Decline - Prompts a box to enter the reason and sets the action status to "Declined" and then notifies the step's responsible person. When an action is assigned to a group, the notification only notifies the step's responsible person after all members of the group have declined the action. The responsible person can see all the members reasons for declining an action in the action screen.

Open Action - Opens the workflow screen focused on the action.

Complete - Prompts whether to "complete" the action or not. If "Yes" is clicked, it sets the action status to "Success" without executing the function linked to the action (usually opening a screen) and moves the workflow pointer to the next step or action.

1.7.3 Register Item Notification

Screen displays register items that match the following criteria:

The register date is today or earlier

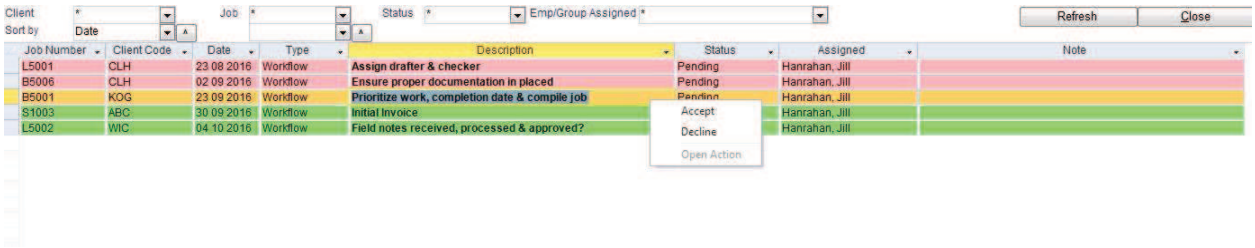
The current user is the person to be notified or that they belong to the notification group to be notified

If in the Setup Latitude screen, the option to use "Simple Notify" is NOT set, only register items that have a status AND that the status is flagged as being notifiable are displayed

Description field - right-click mouse button to see menu. Menu options are:

Accept - Opens the register screen.

Decline - Notifies the person who set the notification.



1.7.4 Notifications through Email (Latitude EmailNotifier) OPTIONAL

EmailNotifier extends "My Notifications Latitude View" to send notifications by email.
Pending workflow actions are emailed to assigned staff.
Declined workflow actions are emailed to the responsible person of the step the action belongs to.
Register notifications are emailed to staff.
Declined register notifications are emailed to the person who set the notification.