

BPMN Introduction

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1.1 Why automate a business process?

Advantages and Objectives

WHAT ARE THE ADVANTAGES?

The main motivations and benefits can be summarized as follows:

Saving time

By delegating the execution of internal business processes to the system, people are given the opportunity to focus on other activities—sometimes freeing themselves from daily "headaches."

Minimizing costs and errors

Human errors, misunderstandings, and oversights always result in additional costs. Minimizing them is a challenge every company must face.

Optimizing communication

Endless flows of emails and phone calls between departments are not the most efficient way to organize and manage work, especially when completing a process requires the involvement of different teams at different stages.

In an automated process, each person is guided by system notifications that indicate what needs to be done and when. Moreover, all operations, requests, and changes are recorded and traceable, minimizing the risk of lost information.

Reinforcing awareness of roles and responsibilities

For the workflow to be correctly managed through the software, every team member, in every department, must clearly understand their tasks and responsibilities. This requires a clear definition of hierarchies and interdepartmental relationships, and most importantly, a clear indication of who assigns tasks, provides input, and approves or rejects outputs.






Keeping everything under control

Managing workflows in an automated way not only allows you to know the status of each activity at any given time but also to maintain an overview of the entire situation. Automating monitoring means fewer meetings and a significant time saving.



WHAT ARE THE OBJECTIVES OF BPMN?

The main objectives can be summarized as follows:

-  The ability to identify so-called “bottlenecks,” which often cause damage by reducing overall productivity.
-  The ability to monitor the operational flow of business procedures, helping to avoid stumbling over even the most complex scenarios.
-  Improving the exchange of information to facilitate data management at a structural level.
-  Having a unified “blueprint” of processes so that all business workflows can be executed and managed consistently.
-  Effectively integrating people and activities by using tools that are accessible to all types of business roles—not just technical ones.

1.2 Process Manager

Section: General Description and List of Features























GENERAL DESCRIPTION

This section allows you to modify, create, import, and export BPMN processes. It is composed of the following columns:

- **Name** → represents the name of the process
- **Description** → represents the description of the process
- **Sub-processes** → indicates the list of any sub-processes linked to the current process
- **CRM Module** → indicates the name of the *main* CRM module involved in the process, which forms the basis for the initial (starting) conditions of the process
- **Active** → indicates whether the process is active (yes) or inactive (no)

 Settings > Process manager
Allow to create custom processes

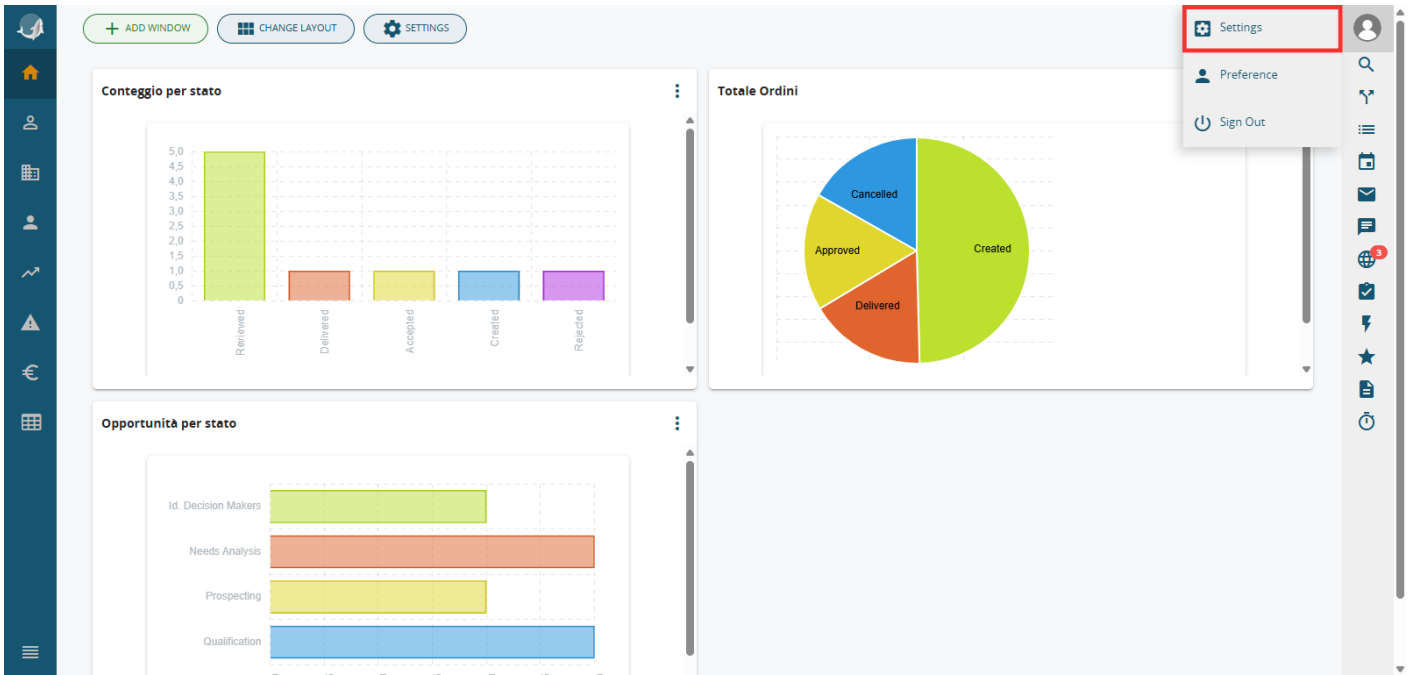
Show 50 entries Search:

Actions	Name <input type="text" value="Search for Name"/>	Description <input type="text" value="Search for Description"/>	Subprocesses <input type="text" value="Search for Subprocesses"/>	CRM Module <input type="text" value="Search for CRM Module"/>	Active <input type="text" value="Search for Active"/>
   	Expiration management 			Cases	yes
   	Set alert date 			Cases	yes
  	Lead conversion 			Leads	yes
   	70% hours exceeded 			Project Tasks	yes
   	90% hours exceeded 			Project Tasks	yes

Accessing the Process Manager Section with the “Next” Theme

To access the Process Manager section with the “Next” theme enabled, follow these steps:

- 1) Click on the profile icon, then select “Settings”



2) In the left-hand menu, click on the “Business Process Manager” section, then select “Process Manager”

The screenshot shows the "Process manager" interface with a sidebar menu and a main table of processes. The sidebar menu includes options like "GO BACK", "User permissions", "Business Process Manager", "Process manager" (highlighted with a red box), "Basic workflows", "Mail Converter", "Synchronizations", "Wizard creator", "Module creator", "Module settings", "Picklist editor", "Internationalized picklist", "Linked picklist", "Status fields permissions", and "Condition based".

Name	Description	Subprocesses	CRM Module	Active
Reset Dynamic Form			Accounts	no
Reset Conditional Fields			Accounts	no
Link Entities and Link Static Entities			Accounts	no
Cycle Related Records			Accounts	no
Expiration management			Cases	yes
Set alert date			Cases	yes
Lead conversion			Leads	yes
Create Entity			Leads	no
Update Entity			Leads	no
Delete Entity			Leads	no
Send Email			Leads	no
Send Newsletter			Leads	no
Transfer Relationships			Leads	no

LIST OF FEATURES

Below is the list of main features:

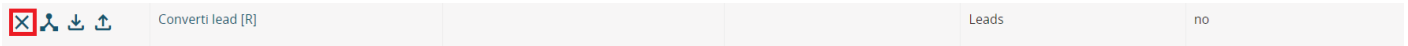
- Delete process
- Export BPMN process
- Export VTE BPMN process
- Import VTE BPMN into an existing process
- Create process
- Import a new process from scratch

Delete Process

By clicking the button shown in the image, you can delete the selected process.

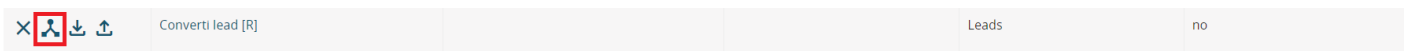
WARNING!: Deleting a process using the X button in the Process Manager section permanently deletes the process from all related tables in the DB.

Therefore, it is important to proceed with caution when using this function, as once deleted, there will be no way to restore the process and all pending instances associated with the affected records.



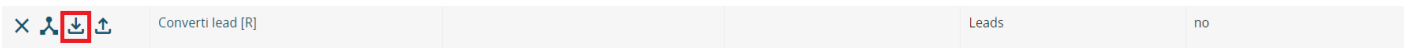
Export BPMN Process

By clicking the button shown in the image, you can export only the graphical structure of the process, excluding its configuration.



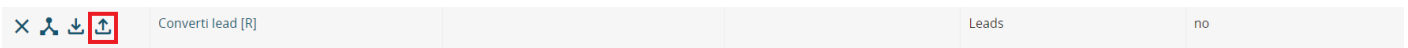
Export VTE BPMN Process

By clicking the button shown in the image, you can export the entire process (structure + configuration).



Import VTE BPMN into an Existing Process

By clicking the button shown in the image, you can import a new version of the selected process.



Create Process

To create a process, follow these steps:

- 1) Go to the Process Manager section (see the paragraph “Accessing the Process Manager Section with the Next Theme” or “Accessing the Process Manager Section with the Next22 Theme,” depending on the theme in use)
- 2) Click the **NEW** button located at the top right

Business Process Manager

Process manager

Basic workflows

Mail Converter

Synchronizations

Wizard creator

Module creator

Module settings

Picklist editor

Internationalized picklist

Linked picklist

Status fields permissions

Condition based fields

Encrypted fields

Top menu settings

Listview colors

REST Webservices

External applications

Settings > Process manager
Allow to create custom processes

Show 50 entries

Search:

Actions Name Description Subprocesses CRM Module Active

Actions	Name	Description	Subprocesses	CRM Module	Active
	Reset Dynamic Form			Accounts	no
	Reset Conditional Fields			Accounts	no
	Link Entities and Link Static Entities			Accounts	no
	Cycle Related Records			Accounts	no
	Expiration management			Cases	yes
	Set alert date			Cases	yes
	Lead conversion			Leads	yes
	Create Entity			Leads	no
	Update Entity			Leads	no
	Delete Entity			Leads	no
	Send Email			Leads	no

New

3) Enter a name, an optional description, and then click on **“CREATE NEW”**

Settings > Process manager
Allow to create custom processes

Name

Description

Import... **Create New** Cancel

Once the previous steps are completed, the user will be directed to the screen for configuring the process flowchart (see chapter 1.4)

Import a New Process from Scratch

To import existing processes, after navigating to the “Process Manager” section, follow these steps:

1) Click the **NEW** button located at the top right

vtentext

Business Process Manager

Process manager

- Basic workflows
- Mail Converter
- Synchronizations
- Wizard creator
- Module creator
- Module settings
- Picklist editor
- Internationalized picklist
- Linked picklist
- Status fields permissions
- Condition based fields
- Encrypted fields
- Top menu settings
- Listview colors
- REST Webservices
- External applications

Settings > Process manager
Allow to create custom processes

Show 50 entries

Search:

New

Actions	Name	Description	Subprocesses	CRM Module	Active
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Reset Dynamic Form			Accounts	no
	Reset Conditional Fields			Accounts	no
	Link Entities and Link Static Entities			Accounts	no
	Cycle Related Records			Accounts	no
	Expiration management			Cases	yes
	Set alert date			Cases	yes
	Lead conversion			Leads	yes
	Create Entity			Leads	no
	Update Entity			Leads	no
	Delete Entity			Leads	no
	Send Email			Leads	no

2) Enter a name, an optional description, and then click on **“Import”**

Settings > Process manager
Allow to create custom processes

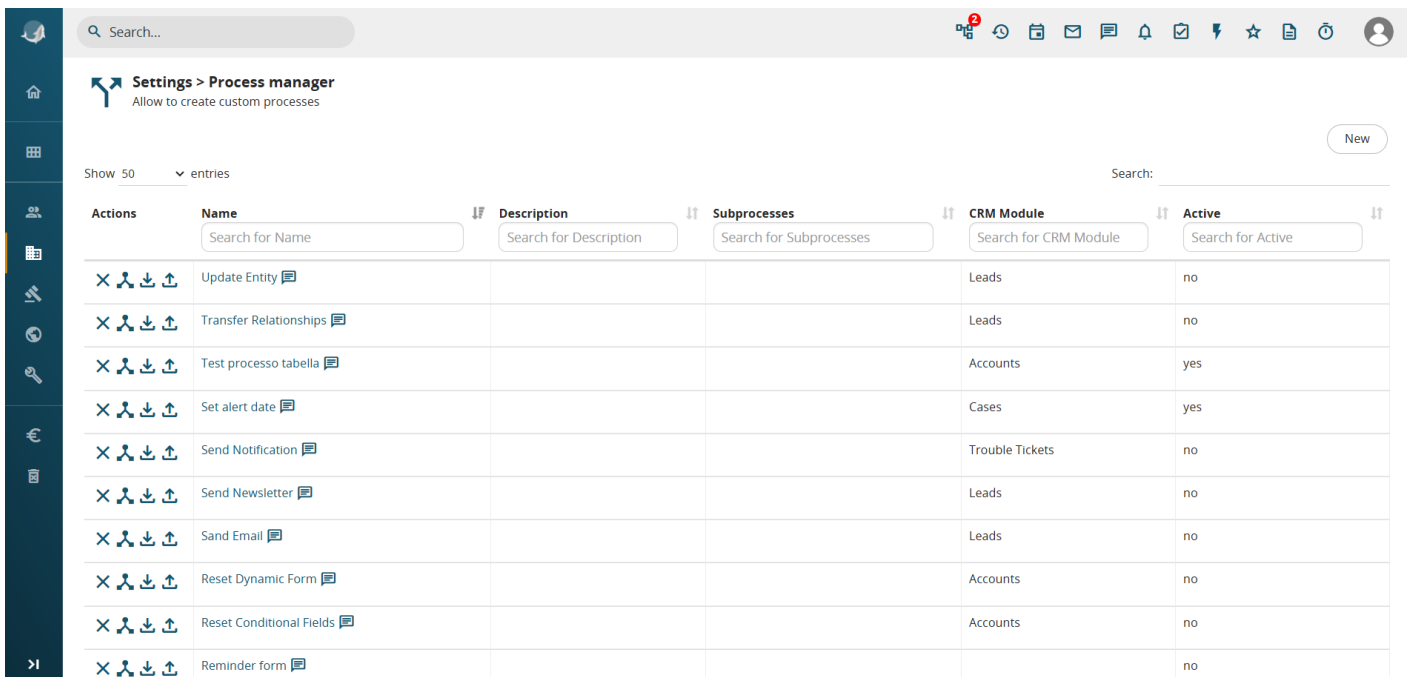
Name

Description

1.3 Flowchart Configuration and Left Menu

FLOWCHART

To view the flowchart of an existing process, click on its name in the "Name" column of the "Process Manager" section. (Figure 1)



The screenshot shows the 'Settings > Process manager' interface. The breadcrumb trail is 'Settings > Process manager' with the subtitle 'Allow to create custom processes'. There is a search bar at the top right with a 'New' button. Below the search bar, there is a 'Show 50 entries' dropdown and a 'Search:' input field. The main content is a table with the following columns: 'Actions', 'Name', 'Description', 'Subprocesses', 'CRM Module', and 'Active'. Each row represents a process action with icons for delete, edit, and refresh, and a document icon. The 'Name' column has a search input field.









































Actions	Name	Description	Subprocesses	CRM Module	Active
  	Update Entity 			Leads	no
  	Transfer Relationships 			Leads	no
  	Test processo tabella 			Accounts	yes
  	Set alert date 			Cases	yes
  	Send Notification 			Trouble Tickets	no
  	Send Newsletter 			Leads	no
  	Sand Email 			Leads	no
  	Reset Dynamic Form 			Accounts	no
  	Reset Conditional Fields 			Accounts	no
  	Reminder form 				no

Figure 1

Within this section, you can configure all the elements included in the diagram by clicking directly on each one. (Figure 2 and Figure 3)

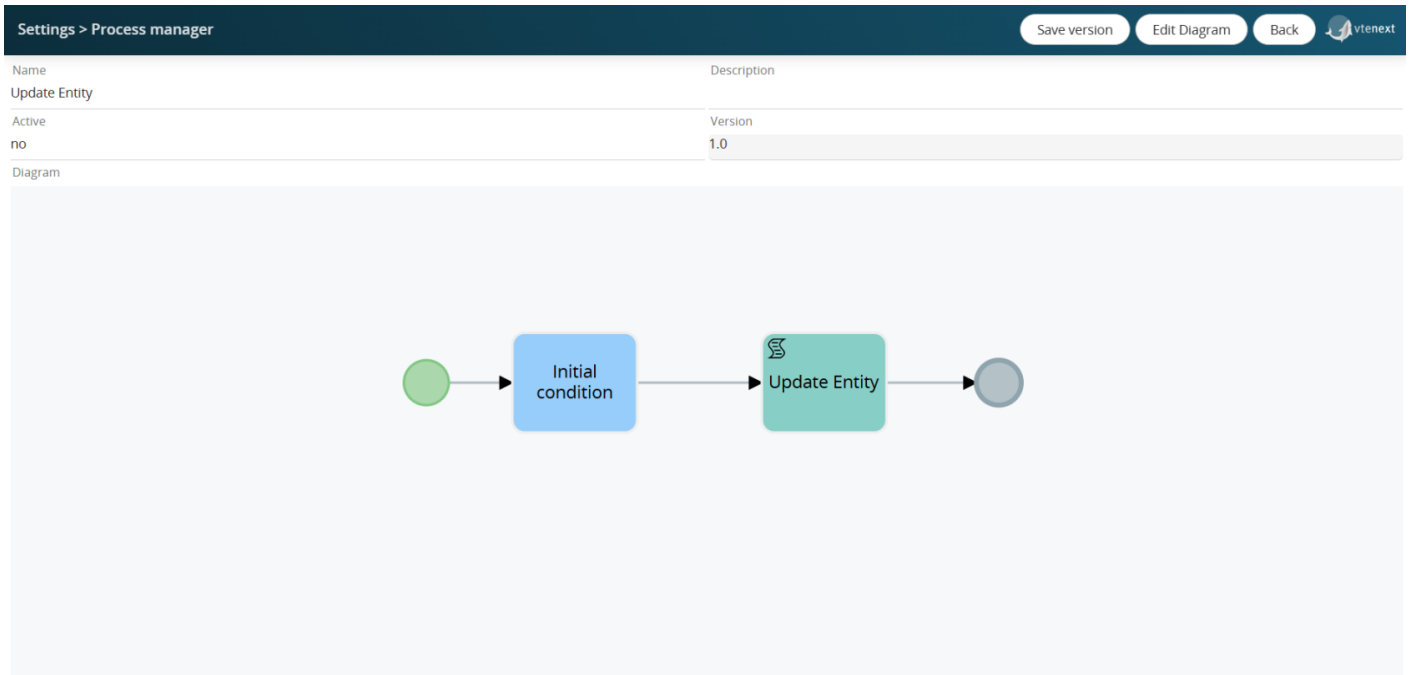


Figure 2

BPMN-Task: Initial condition Task_10m5mbk

Save Cancel

Entity: Lead

When to run the check

- on create
- on create / change
- on change
- every time the condition is true
- only the first time the process starts
- when executed subprocess
- on relation with: Products

Conditions

Lead Status has changed to Converted

New Condition

New Group

Figure 3

N.B.: The configuration of individual elements will be covered in subsequent chapters.

To make changes to the process diagram, click the "Edit Diagram" button. (Figure 4)

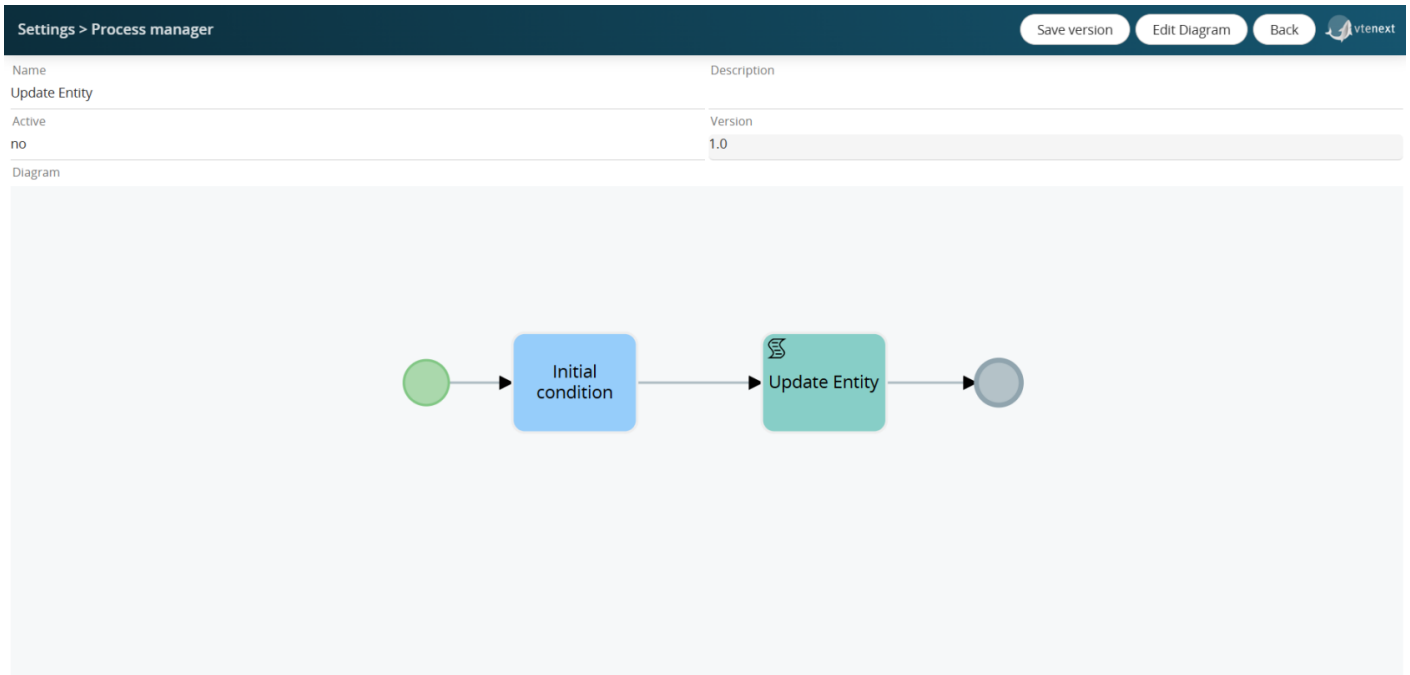


Figure 5

The elements used to construct the process diagram can also be quickly selected through a shortcut menu that becomes available by clicking on a specific element already involved. (Figure 6)

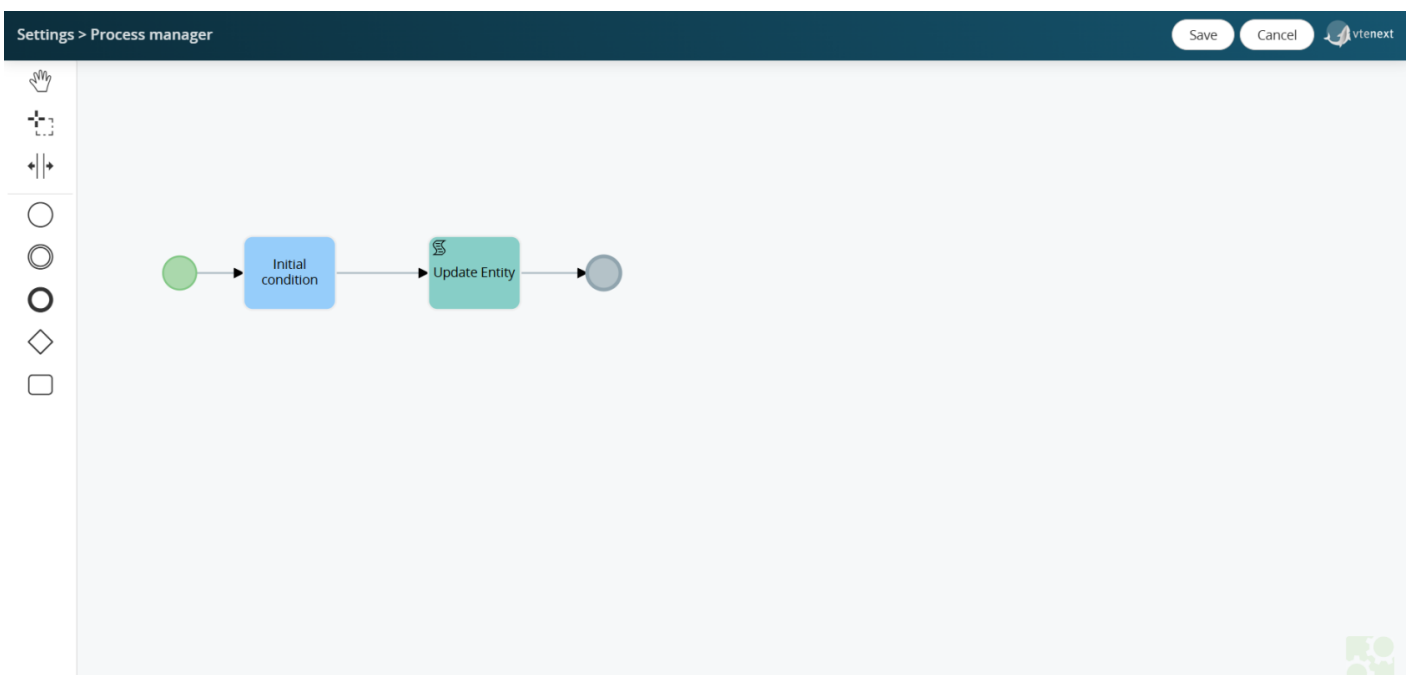














Figure 6

LEFT MENU

This is a menu that can be used while editing the process diagram and includes:

- A quick selection of the main elements available for creating processes
- A set of useful functions for the easy and organized creation of process flows

	Hand Tool
	Lasso Tool
	Create/Remove Space Tool
	Start Event
	Intermediate/Boundary Event
	End Event
	Gateway
	Task
	Sub Process
	DataObjectReference
	DataStoreReference
	Pool/Participant

Hand Tool

A useful tool for moving the view easily and efficiently.

Lasso Tool

A useful tool for moving a group of tasks/elements at the same time, making the organization and structuring of the flow easier and faster.

Create/Remove Space Tool

A useful tool for moving all tasks/elements at once, facilitating the easy and fast structuring of the flow.

Start Event

Allows you to select and use the Start Event.

End Event

Allows you to create and use the End Event.

Intermediate/Boundary Event Timer

Allows you to create and use the Intermediate/Boundary Event.

Gateway

Allows you to create and use Gateways.

Task

Allows you to create and use Tasks.

Sub Process

Allows you to create and use Sub Processes.

DataObjectReference

This symbol allows for an action that is currently not yet implemented.

NOTE: As of version 24.08, it has been completely removed.

DataStoreReference

This symbol allows for an action that is currently not yet implemented.

NOTE: As of version 24.08, it has been completely removed.

Pool/Participant

Allows you to create areas in which parts of the process flow can be inserted. New tasks/elements cannot be created or moved outside these areas. It is also possible to textually indicate the actors

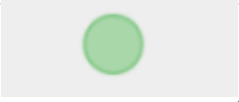

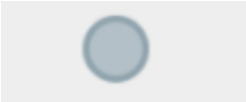




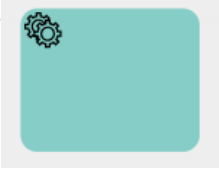

involved.

NOTE: As of version 24.08, it has been completely removed.

1.4 Simbology

SYMBOLS

Below is the set of symbols used to create a diagram.

 	START EVENT E TIMER START EVENT
	END EVENT
	INTERMEDIATE / BOUNDARY EVENT TIMER
 	EXCLUSIVE GATEWAY E PARALLEL GATEWAY
 	CONDITIONAL TASK E ACTION TASK
	CONNECTORS

1.5 BPMN Actions

Below the main BPMN actions:

- [CREATE ENTITY](#)
- [UPDATE ENTITY](#)
- [DELETE ENTITY](#)
- [SEND NOTIFICATION](#)
- [SEND EMAIL](#)
- [SEND NEWSLETTER](#)
- [CREATE PDF](#)
- [RESET DYNAMIC FORM](#)
- [CYCLE ROWS](#)
- [RESET CONDITIONAL FIELDS](#)
- [LINK ENTITY e LINK STATIC ENTITY](#)
- [TRANSFER RELATIONS](#)
- [INSERT TABLE ROWS AND PRODUCT ROW](#)
- [COPY PRODUCTS BLOCK](#)
- [CALL EXTERNAL WEB SERVICE](#)
- [CYCLE RELATED RECORD](#)

1.6 Process Helper Section: Introduction and Usage Guide

INTRODUCTION

The Process Helper, as the name suggests, is a tool designed to assist those configuring processes by allowing them to create “structures” for requesting and storing data, known as “Dynamic Forms.”

It consists of two main sections:

HEADER FIELDS

DYNAMIC FORM

USAGE GUIDE

Specifically, there are several ways to use this tool. Below are the main ones:

1) Using Process Helpers (and their Dynamic Forms) to create custom forms for Internal/External/Business Portal users to request and save information

Examples:

USING PROCESS HELPER TO REQUEST DATA FROM INTERNAL USERS

USING PROCESS HELPER TO REQUEST DATA FROM EXTERNAL USERS

USING PROCESS HELPER TO REQUEST DATA FROM BUSINESS PORTAL USERS

2) Using Process Helpers to activate the “Process Graph” section, enabling you to:

- Monitor the progress of a single process instance along with the actors involved
- Perform direct maintenance on active process instances

Example:

USING PROCESS HELPER TO ACTIVATE THE PROCESS GRAPH

3) Using Process Helpers (and their Dynamic Forms) to create virtual spaces for storing data or performing operations that are needed only within the process (and therefore do not need to be saved in CRM modules)

Example:

USING PROCESS HELPER FOR INTERNAL PROCESS USE