

Easy Does It

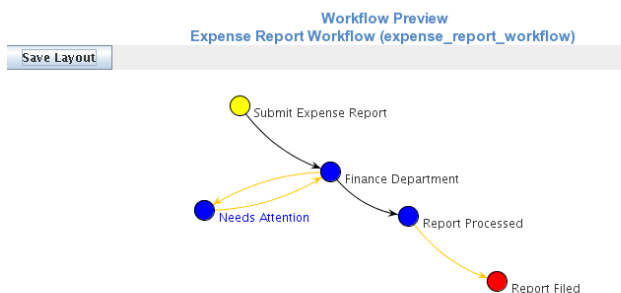
Workflows Made Easy in Novell Teaming 2

Novell Teaming 2 is all about empowering users to be more innovative and productive. Not only does Teaming bring the right people with the right skills together in secure, interactive, online workspaces, but it also puts tools directly in the hands of your users that further boost productivity and enhance their interactions. Once you deploy Novell Teaming 2 and configure its powerful access controls, your users are free to immediately begin creating workspaces, sharing information, coordinating activities and moving business forward. They don't have to wait for you or an army of Web developers to create Web pages. They can immediately create their own teams; share files; form discussion groups; create wikis, blogs, surveys and Web landing pages and even produce their own automated workflows.

The workflow engine in Novell Teaming facilitates everything from simple workflows to extremely complex business process workflows.

The built-in workflow capabilities in Novell Teaming 2 enable you and your users to automate, streamline and enhance processes to save time, eliminate errors and improve overall efficiency. The workflow engine in Novell Teaming facilitates everything from simple workflows to extremely complex business process workflows.

Figure 1: When using the Form and View Designer interface to create a workflow in Novell Teaming 2, it provides you a graphical representation of your workflow design.



> Easy Creation

The nice thing about workflows in Novell Teaming is that you don't have to be a developer to deploy or leverage their capabilities. The View and Form Designer in Novell Teaming makes it easy to create and customize all the elements of a basic workflow: States, Transitions, Entries (also known as forms), Folders, Notifications and On-entry/On-exit Settings and Access Controls.

Last year [Novell Connection](#) published an article that discusses workflow support in Novell Teaming, including workflow best practices and the concepts involved in creating simple to advanced workflows (See [Workflow in Teaming](#)). Although that article centers on workflows in the first version of Novell Teaming, most of what it covers still applies in Novell Teaming 2. Additionally, the Advanced User Guide for Novell Teaming 2 details how to create both simple and advanced workflows, generally consisting of the following basic steps:

- **Creating the workflow definition** – Define the caption (display name) and internal data name of the workflow.
- **Adding workflow states** – Define the caption, internal data name and description of each workflow state. Examples of states might include New Item, Review Item, Item Approved, etc.
- **Adding workflow transitions** – Define how an entry will move from one state to another. This might include transitioning immediately, after a specified amount of time, after a comment is entered, upon a manual action, in a customized manner or as a result of any other criteria you specify.
- **Adding actions** – Add the option to initiate certain actions when an entry enters or leaves a state. This might include sending an e-mail notification or moving an article or trouble ticket to a different folder.
- **Configuring access controls** – Specify who can access the entire workflow or specific states in the workflow.
- **Enabling the workflow for use** – Define when, where and how a workflow will start.

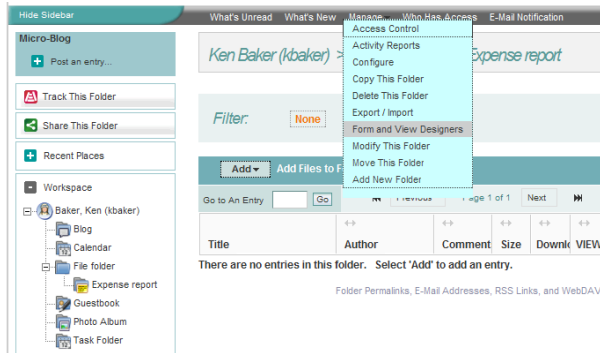
In addition to the instructions provided in the Advanced User Guide, Novell provides a number of articles on

workflow concepts and creation at novell.com/communities/node/8585/teaming-2-tutorial-new-form-and-workflow-series.

> Ready-Made Workflows

Even though Novell Teaming makes it easy to create and customize your own workflows, you don't have to start from scratch. In the Novell Teaming Library, Novell provides a growing online collection of entry forms and workflows you can download (or customize) to address specific business problems. (Visit novell.com/communities/cool-solutions/teaminglibrary) Some of the most frequently downloaded workflows in this library include Time Off Request, Employee Help Desk, Catering Request, Travel Request, Meeting and Room Request, Employee Self Evaluation, Bug/Issue Management and Tracking, Bid List Application and Expense Report.

Figure 2: The Form and View Designer interface for creating, customizing and importing workflows is accessed in a workspace from the Manage menu option.



For example, the Expense Report form and workflow allows you to gather and track all of your business-related expenses at the individual level. The workflow first submits an expense report to the Records Department for long-term storage. A copy of the expense report is also submitted to the Statistics Department to enable your organization to better manage and understand costs.

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Accordingly, the states for this workflow template consist of Submit Expense Report, Finance Department, Needs Attention, Report Processed and

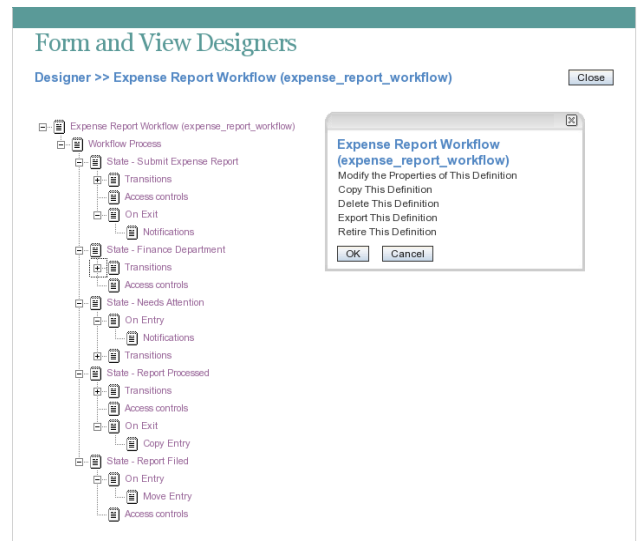
Report Filed. (See Figure 1.) Each state includes a transition definition that determines how the process moves from that state to the next. Some of the states have access controls or actions assigned to them as well. For example, if an entry moves into the Needs Attention state, a notification will be sent to the appropriate user or group.

Figure 3: You can import form and workflow templates locally to any workspace from within the Form and View Designer interface.



To take advantage of this template—or any other workflow template you have downloaded—you can deploy it globally by logging into Novell Teaming as an administrator, selecting Site Administration under the Manage tab and selecting Form and View Designers. From within the Form and View Designers window, select Import on the navigation bar, browse to the location where you downloaded the zipped workflow template and click OK.

Figure 4: After importing a workflow template, the Form and View Designer interface lets you customize its definitions so it will run it properly in your environment..



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To import a workflow into a local team workspace or folder, the process is very similar. Users simply navigate to the workspace or folder where they want the workflow to run—and one to which they have sufficient rights—and then select Form and View Designers under the Manage tab, select Import on the navigation bar, browse to the zipped workflow template and click OK. (See Figure 2 and Figure 3.)

Although the import is fast and very easy, you will likely need to make some modifications to the workflow or its form definitions to properly run it in your environment. The modifications might be as basic as changing the way the workflow forms or entry fields look to specifying what users may participate in the different states of the workflow. These modifications and customizations are done from within the Form and View Designers window. (See Figure 4.) The Novell Cool Solutions article titled [Deployment Instructions Teaming 2](#) provides more details on how to deploy and customize the workflow templates available in the Novell Teaming Library.

Once you've customized your workflow, you simply need to enable it to work. To do this, navigate to the workspace or folder where you deployed the workflow and select Configure from the Manage tab. When the Configure Default Settings window displays, go to the Workflow Associations section. Here you can select the workflow to be automatically associated with the entries in this folder. Creating an association here will cause the specified workflow to start automatically when any entry is added to the folder. From the Allowed Workflows section in the same window, you can select the workflows that you want to make available for the folder; this setting defines the workflows that can be manually started at any time after the entry is created. For example, you might want to start a Document Review workflow on an entry when it is ready to be reviewed.

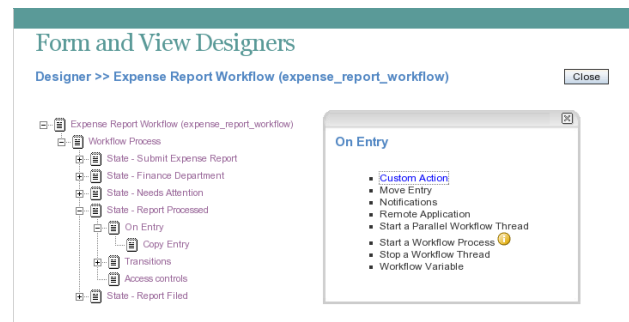
There are currently more than twenty workflows in the Novell Teaming Library and the list continues to grow. To help grow the library of workflows even further,

Novell invites you to contribute your own workflows or suggestions for workflows by sending it in an e-mail to teaminglibrary@novell.com.

> Workflow Enhancement and Management

Novell Teaming 2 introduces a powerful new workflow feature that provides the ability to integrate workflows with third-party systems such as SAP, Salesforce.com or an Asterisk server. To extend a workflow in this manner, from within Form and View Designers, you can define a custom action on an On Entry or On Exit field of the workflow. (See Figure 5.) This custom action can call a custom Java class to perform specific developer-defined actions as the workflow transitions in to or out of any specific state. This includes the ability to talk to, pass data to, launch or receive data from external workflows.

Figure 5: Novell Teaming workflows can be extended to integrate with third-party systems by defining a custom action on an On Entry or On Exit field that calls a Java class.



Whether you deploy basic workflows or advanced workflows that integrate with other systems, Novell Teaming 2 lets you and your teams easily monitor and manage your workflows through custom workflow dashboards. These workflow dashboards present authorized workflow participants or managers with a summary view of the current state of their in-process workflows. For instance, dashboards can let help desk managers see at a glance how many trouble tickets are in the queue, how long have tickets been waiting to be assigned or how many have been resolved.

While Novell Teaming generally enables more efficient business, its workflow tools, templates, forms and customization capabilities enable faster, easier creation of streamlined and automated business processes that can help you and your team members innovate and be even more productive than ever before.