

CONFIGURABLE WORKFLOW & SLAs ENGINE

AGENDA

OPTIONAL SUBTITLE

- 1 General Characteristics
- 2 User Experience
- 3 Configuration Mechanism



GENERAL CHARACTERISTICS



WORKFLOW & SLAs ENGINE

CHARACTERISTICS

- **Zero-coding** and no IT skills needed to configure a Workflow
- **Integrated SLAs management** engine that can trigger events and activate Workflow transitions
- All configurations are done using **Dynamics 365** only
- Clear Workflow management with visibility on **possible next actions** and **transitions**
- Guided workflow including **contextual documentation**
- Workflow **audit** on occurred transitions



WORKFLOW & SLAs ENGINE

VERSIONS COMPARISON

Full version

- No pre-defined limitation on Workflow Steps
- No pre-defined limitation on configurable SLAs
- Workflow attachable to any business entity

Light version

- 8 Workflow Steps Limit
- 2 SLAs Limit
- It can be used with Case entity only

For any question and information about light and full version, please contact us at:
dynamics365@reply.it



WORKFLOW&SLAs ENGINE

LOGICAL ARCHITECTURE



- Solution Package is a **standard managed** Dynamics CRM Solution.
- **On-Cloud** and **On-Premises** ready.



USER EXPERIENCE



WORKFLOW & SLAs ENGINE

WORKFLOW MONITORING

Business users' activities will be driven by **Workflow Management**.

In the following example the Configurable Workflow and SLAs Engine has been attached to the **Case** entity.

Users will be able to see:

- **Actual Case Status**
- **Workflow Definition** the Case is driven by
- **Next Possible Statuses** the Case can reach

CASE : WORKFLOW MANAGEMENT ▾ Customer case ☰	Priority Normal	Created On 🔒 23/04/2018 23:48	Status Reason In Progress	*Owner 👤 Carmelo Scarso
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Identify (Active for 40 days, 22 hours) ▶ Research ▶ Resolve

▸ General

▾ Workflow management

Workflow status	
Actual Case Status	First communication sent
Workflow Definition	Standard Workflow

Next Possible Statuses

Customer contacted	Close email
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WORKFLOW & SLAs ENGINE

NEXT ACTIVITIES

Next Activities related to current case status, are shown in the Case form to guide users to progress with the Workflow.

It is possible to configure a **Due Date** for each created activity.

CASE : WORKFLOW MANAGEMENT ▾
Customer case ☰

Priority
Normal

Created On
🔒 23/04/2018 23:48

Status Reason
In Progress

*Owner
👤 Carmelo Scarso

Identify (Active for 40 days, 22 hours) ▶ Research ▶ Resolve

Next activities

Activities + 📅

Subject ↑	Regarding	Activity Type	Activity Status	Priority	Due Date
WF-M Call customer	🔧 Customer case	Phone Call	Open	Normal	
WF-M Notify the technician	🔧 Customer case	Task	Open	Normal	



WORKFLOW & SLAs ENGINE

ACTIVITY HISTORY

A **full activity history** is shown in order to audit the actions performed within the Workflow. This allows users to see all the history of the Case in terms of **performed activities**.

CASE : WORKFLOW MANAGEMENT ▾
Customer case ☰

Priority
Normal

Created On
🔒 23/04/2018 23:48

Status Reason
In Progress

*Owner
👤 Carmelo Scarso

Identify (Active for 40 days, 22 hours) ▶ Research ▶ Resolve

Closed activities

+ 📄

Subject	Activity Type	Actual End ↓	Due Date
Identify the problem	Task	08/05/2018 14:57	08/05/2018 10:25
Call customer support	Phone Call	27/04/2018 16:50	26/04/2018 15:15
A new case has been opened CRM:0001004	Email	23/04/2018 23:49	21/04/2018 14:23



WORKFLOW & SLAs ENGINE

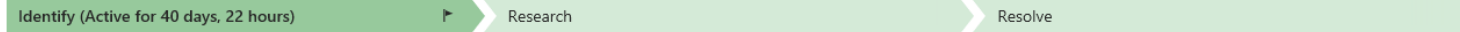
STATUS TRANSITIONS

All the **Status Transitions** are listed in order to show the exact path of the workflow followed.

Users will be able to see:

- **Start Case Status**
- **End Case Status**
- **When** the Transition to the End Case Status has been completed

CASE : WORKFLOW MANAGEMENT ▾ Customer case ☰	Priority Normal	Created On 🔒 23/04/2018 23:48	Status Reason In Progress	*Owner 👤 Carmelo Scarso
---	--------------------	----------------------------------	------------------------------	----------------------------



Status transitions				
+				
Subject	Start Case Status	End Case Status	Activity Status	Actual End ↓
New case opened -> First communication sent	New case opened	First communication sent	Completed	14/05/2018 10:03
Customer contacted -> New case opened	Customer contacted	New case opened	Completed	14/05/2018 10:00



WORKFLOW & SLAs ENGINE

SLA CONTROLS

SLA Controls are generated based on the defined SLA Configuration rules.

SLA Controls allows to monitor:

- When the SLA has **started**
- When the SLA has been **closed**
- Current **Duration**
- When the SLA will **fail**

CASE : WORKFLOW MANAGEMENT ▾
Customer case ☰

Priority
Normal

Created On
🔒 23/04/2018 23:48

Status Reason
In Progress

*Owner
👤 Carmelo Scarso

Identify (Active for 40 days, 23 hours) ▶ Research ▶ Resolve

SLA Controls

+ 📄

Name	Status Reason	Start Date ↑	End Date	Elapsed Hours	Failure Time
New case opened -> First communication sent	Success	23/04/2018 23:54	25/04/2018 12:05	36,02	27/04/2018 23:54
First communication sent -> Customer Contacted	Success	14/05/2018 10:03	14/05/2018 10:15	0,20	18/05/2018 10:03



WORKFLOW & SLAs ENGINE

CONTEXTUAL DOCUMENTATION

Contextual Documentation allows users to refer to documents (e.g. operational guidelines, best practices) specific to a particular Case Status. Only published documents will be shown to business users.

Users will be able to see:

- **Document Name** to be referred and open it
- **When** the document has been published
- **Who** published it

CASE : WORKFLOW MANAGEMENT ▾ Customer case ☰	Priority Normal	Created On 🔒 23/04/2018 23:48	Status Reason In Progress	*Owner 👤 Carmelo Scarso
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Identify (Active for 40 days, 22 hours) ▶

Research ▶

Resolve

Contextual Documentation

Document Name ↑	Published On	Published By
Call the customer	27/04/2018 15:13	Mauro Feltrin
Notify the technician	13/05/2018 22:24	Carmelo Scarso



CONFIGURATION MECHANISM

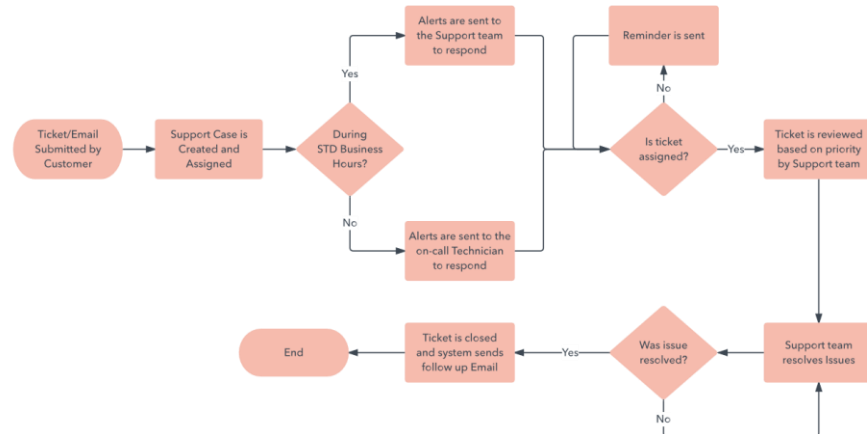


WORKFLOW ENGINE

GENERAL DESCRIPTION

The objective is to model, in a **open**, **flexible** and **configurable** way, complex Workflows using Dynamics CRM only.

The other aim is to make users (“configurators”) **autonomous** in creating or amending workflows without the need of developments and involvement of external parties.



WORKFLOW ENGINE

WORKING SCHEMA

CASE STATUS CONFIGURATION : INFORMATION

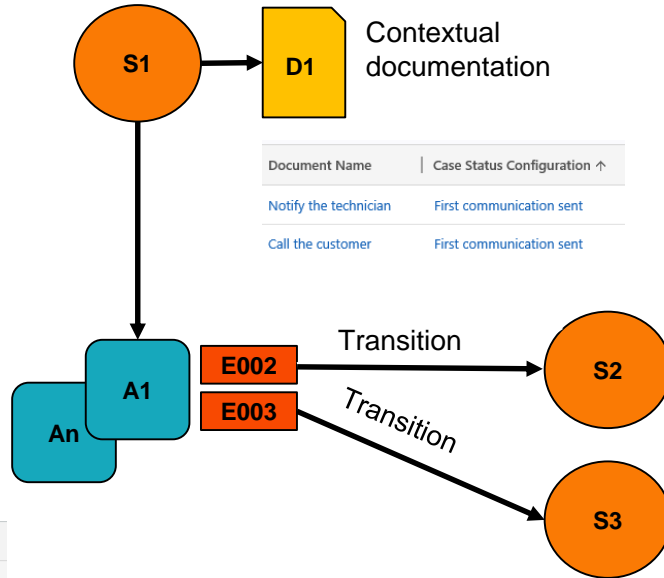
First communication sent ☰

Status Configuration

Name	First communication sent
Workflow Definition	Standard Workflow
Status Description 1	First communication sent
Status Description 2	First Stage
Status Description 3	Open

Next possible activities

Subject	Regarding	Activity Type
Notify the technician	First communication sent	Task
Call customer	First communication sent	Phone Call



Document Name	Case Status Configuration ↑
Notify the technician	First communication sent
Call the customer	First communication sent

Events

Name ↑	ID Event
Call completed	Event002
No answer	Event003

Next possible Statuses

Next Status ↓	Event
Customer contacted	Call completed
Chase email	No answer

- Given a start Status Configuration **S1** (*First Communication Sent*), you can configure:
 - A Contextual Documentation **D1** (*Call the Customer, Document*) to be shown to users;
 - A set of Next Possible Activities **A1...An** (*Notify the Technician, Call customer*) to be performed by business users in the particular Case Status Configuration.
- Each Activity can be attached to one or multiple Events **E002, E003** (*Call completed, No answer*).
- Every Event will trigger a Status Configuration Change **S2** or **S3** (*Customer Contacted, Chase Email*), based on the configuration set in Next Possible Statuses.



WORKFLOW ENGINE

TRANSITION SCHEMA

NEW EVENT



- Manual Event
Examples: user closes an activity manually, completes task, makes a phone call
- Automatic Event
Example: SLA violation

WORKFLOW ENGINE



- Checks Events related to the activity
- Checks Status Configuration
- Looks for Next Possible Statuses according to Event and Status Configuration

WORKFLOW EXECUTION



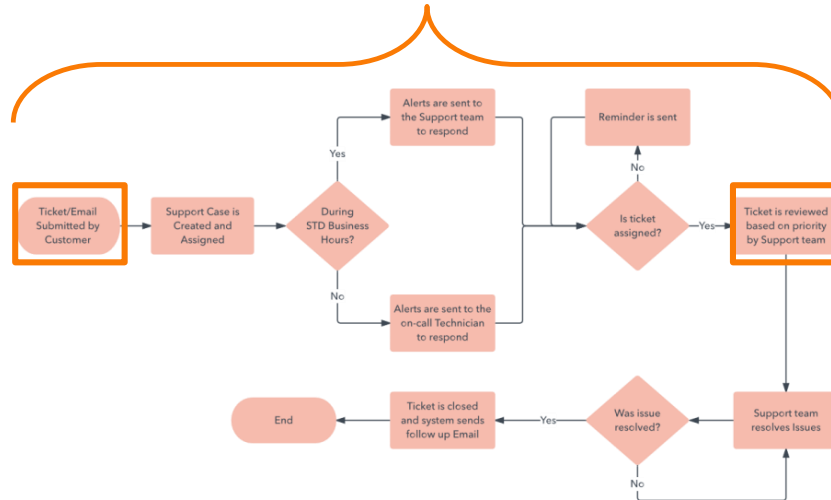
- According to the new Status Configuration:
 - Sets the Next Possible Status
 - Shows Contextual Activities
 - Shows Contextual Documents



SLA ENGINE

GENERAL DESCRIPTION

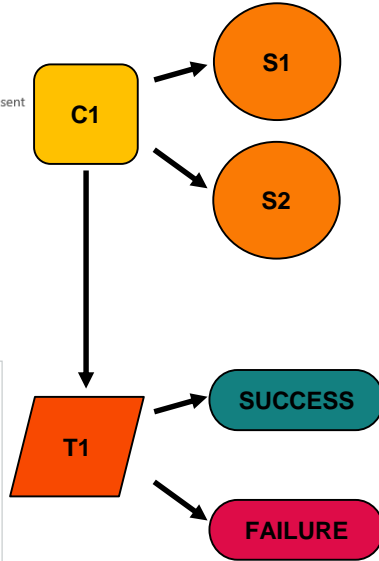
The main aim of the SLA Management engine is to **track time** and, possibly, to take an action when the timeline is due and to monitor currently time passed



SLA ENGINE

WORKING SCHEMA

Start Condition	New case opened
End Condition	First communication sent
SLA Control	New case opened -> First communication sent
Consider Working Calendar	Yes
SLA Duration (Days)	4,00
SLA Type	External



Owner	Carmelo Scarso
Name	New case opened -> First communication sent
Case	Customer case
SLA Configuration	New case opened - First communication sent
SLA Type	External
Start Date	14/05/2018 10:03
End Date	14/05/2018 10:15
Elapsed Hours	0,20
Status Reason	Success
Failure Time	18/05/2018 10:03

Owner	Carmelo Scarso
Name	New case opened -> First communication sent
Case	Customer case
SLA Configuration	New case opened - First communication sent
SLA Type	External
Start Date	14/05/2018 10:03
End Date	
Elapsed Hours	
Status Reason	Active
Failure Time	18/05/2018 10:03

Owner	Carmelo Scarso
Name	New case opened -> First communication sent
Case	Customer case
SLA Configuration	New case opened - First communication sent
SLA Type	External
Start Date	14/05/2018 10:03
End Date	19/05/2018 10:10
Elapsed Hours	97
Status Reason	Failure
Failure Time	18/05/2018 10:03

- A SLA Configuration **C1** (New case opened -> First communication sent) holds the information of the SLA Conditions **S1** (New case opened) and **S2** (First communication sent), that represent the start and the end events needed to track a global action
- When a Start SLA Condition **S1** is reached, a SLA Control **T1** (New case opened -> First communication sent) will be generated with all the information of the SLA Configuration **C1**, including Failure Time
- When the End SLA Condition **S2** is reached:
 - If the SLA Control **T1** is closed before Failure Time, the status will be set to **Success**
 - If the SLA Control **T1** is closed after Failure Time, it will be set to **Failure**
- It is also possible to trigger a Case Status Change once the SLA is violated



SLA ENGINE

TRANSITION SCHEMA

NEW EVENT



- Manual Event
Examples: user closes an activity manually, completes task, makes a phone call
- Automatic Event
Example: SLA violation

SLAS ENGINE



- Checks SLA Configuration
- Checks any SLAs' Failure

WORKFLOW EXECUTION



- According to the new Status Configuration:
 - Sets the Next Possible Status
 - Shows Contextual Activities
 - Shows Contextual Documents



www.clusterreply.eu
dynamics365@reply.it