

Part 4.2: System Functions – Workflow & Tasks

Calem Enterprise Training

Summer 2024
Austin, Texas



CONFIDENTIAL

What are the goals – Workflow & Tasks

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Goals

I know what workflow notifications are available

I know what workflow events can be configured

I know what workflow templates can be customized

I know how to set up monitor roles

I know what scheduled tasks are available

I know how to execute work order generation manually

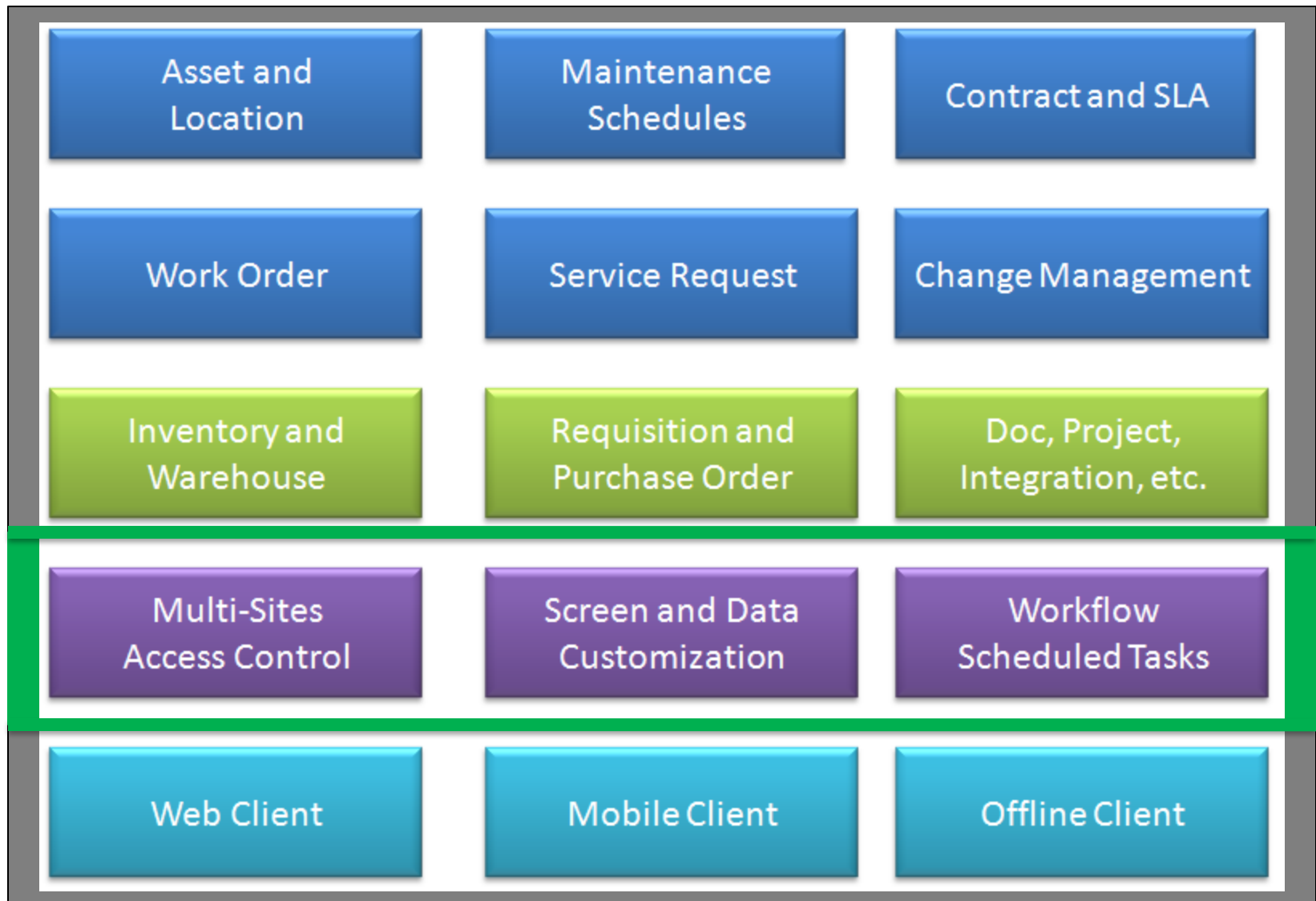
Multi-Site
Access Control

Screen & Data
Customization

Workflow
ScheduledTasks

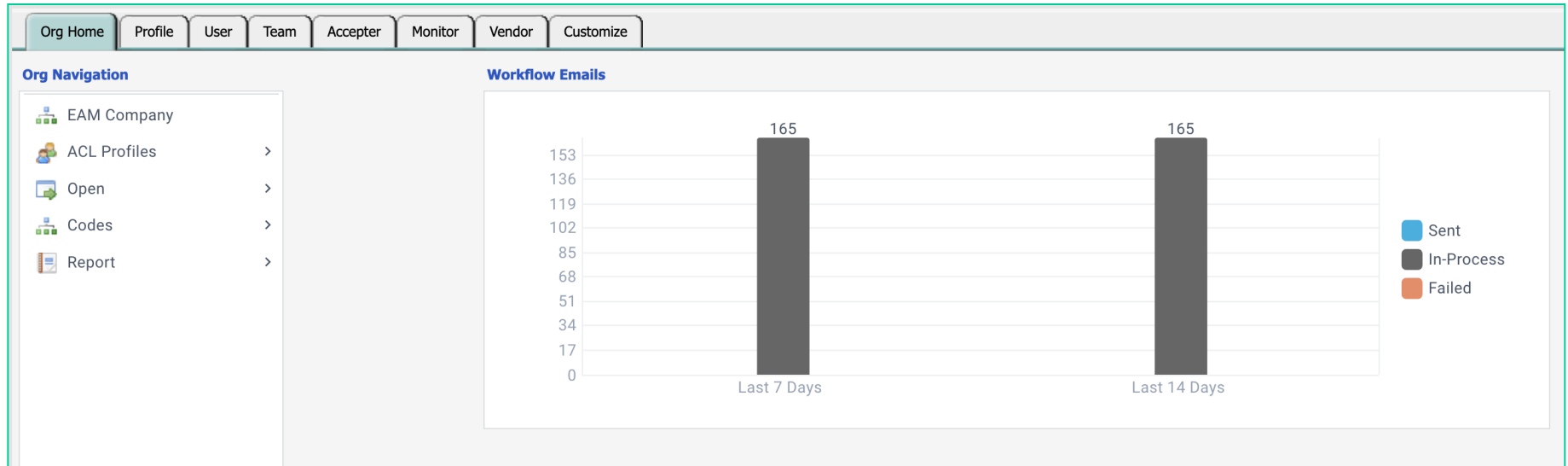
Product Overview – Functions

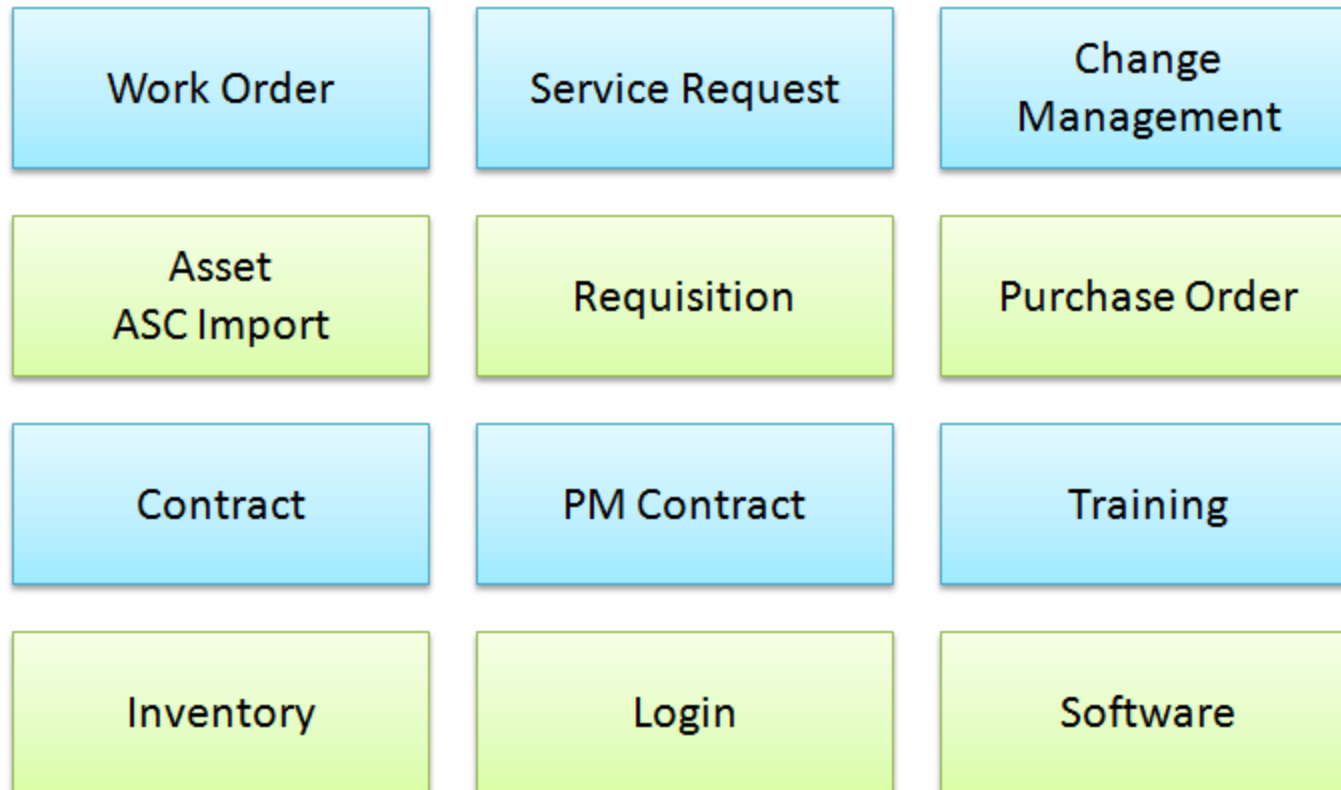
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Product – Multi-Organization

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- Email Configuration
- Recipient Configuration
- Template Configuration
- Event Configuration

- Two-way email integration
 - Notify users of functional events
 - Handle replies from workflow notification emails
 - Work Order
 - Service Request
- Single Email Recipient
 - Each notification is sent to an individual recipient
- Text SMS Notification
 - Mobile operator email function
 - **[10-digit phone number]@txt.att.net** (AT&T in the US)

- HTML or Plain Text templates
- SMS Text templates
- Locale templates (template_fr.php, template_es.php)
- Template customization

Email Recipients

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- Monitor Roles
- Event Recipients

Monitor Roles	Module
Planner, Monitor	Work Order
Dispatcher, Monitor	Service Request
Planner, Monitor	Change Mgmt
Monitor	Asset
Monitor	Contract
Approver, Buyer, Monitor	Requisition
Approver, Monitor	Purchase Order
Monitor	Inventory
Monitor	Training
Monitor	Login
Monitor	Integration
Monitor	Report
Monitor	Software

Email Events – Work Order

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Event	Event
PM SLA Alarm	Status (CM, PM)
WO SLA Alarm	Meter trigger
New (CM, PM)	Terminal Status (CM, PM)
Approve (CM, PM)	Comment New (CM, PM)
Release (CM, PM)	Comment Upd (CM, PM)
Assignment (CM, PM)	Attachment (CM, PM)
Team Assignment (CM, PM)	Quote Approval
Assignment Del (CM, PM)	Pre-Due
Complete (CM, PM)	
Accept (CM, PM)	
Reject (CM, PM)	
Cancel (CM, PM)	
Close (CM, PM)	

Email Events – Service Request

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Event	Event
SLA Response	Comment New
SLA On-Site	Comment Upd
SLA Resolution	Attachment
New SR from Email	
New SR	
Status Change	
Assignment	
Complete	
Accept	
Reject	
Cancel	

Email Events – Change Management

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Event	Event
New	Reviewed
RFI – New	Approved
Resubmitted – New	Completed
Pre-Reviewed	Accepted
RFI – Pre-Reviewed	Rejected
Resubmitted – Pre-Reviewed	Closed
On-Review	Other Status
RFI – On-Review	Sectional Status
Resubmitted – On-Review	

Email Events – Requisition

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Event
New
Pre-Approval
Approved
Other Status

Event
New
Pre-Approval
Approved
Other Status

Event

Meter Trigger

Event
Login Blocked
Login Success

Event
Pre-Expiration
Post-Expiration

Event
Pre-Expiration
Post-Expiration
No Funds

- PM Work Order generation is blocked with expired contracts

Event

Contract-Expiration

Email Events – Scheduled Report

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Event

Report Due

Event

Lot-Expiration

- Configure Work Order Monitor user with email
- Walk through Work Order from creation to closed
- Review events received
 - Explore events not needed and turn off them
 - Explore events not enabled and turn on them
- Explore notification via SMS

Scheduled Tasks

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*Work Order
Generation

*Workflow
Notification

*Service Request
from Email

*User Schedule
Generation

*Database Backup

SLA Alarm Check
(WO/SR)

Contract Expiration

Inventory Lot
Expiration

Training Expiration

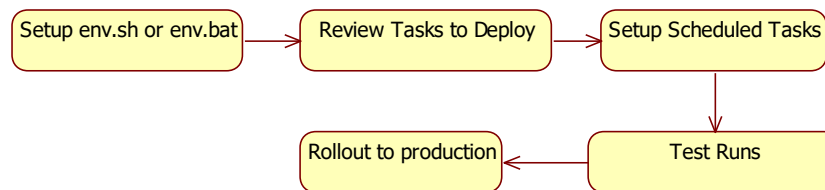
Scheduled Upload

Scheduled Report

Asset Depreciation

* Tasks scheduled in Cloud Service per Calem Enterprise Admin Guide.

- Recurring Tasks
 - Linux Cron
 - Windows Task Scheduler



Scheduled Tasks

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Scheduled Task
User schedules
Scheduled Import
WO Generation
DB Backup
Scheduled Reports
Workflow email sending
SR Email Read
WO SLA Detection
SR SLA Detection
Contract Expiration
Training Expiration
Inventory Lot Expiration
Asset Depreciation

- Explore additional tasks to schedule.

**Thank You for Attending
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Event
License Expiration
Maintenance Support Expiration

- Asset Structure Import

Event
Import Failure
Import Success

Scheduled Tasks

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Scheduled Task	Scheduled Task
User schedules	ASC Integration
Scheduled Import	Asset Depreciation
WO Generation	LDAP Server Sync
DB Backup	Software License Expiration
Scheduled Reports	
Workflow email sending	
SR Email Read	
WO SLA Detection	
SR SLA Detection	
Contract Expiration	
Training Expiration	
Inventory Lot Expiration	