BrightWork: Issue Instantiation Nintex Workflow

Contents

Introduction

This document outlines the instructions to install and configure the Issue Instantiation Nintex Workflow. A pre requisite is to have Nintex Workflow 2010 installed on your SharePoint server.

The purpose of the Issue Instantiation workflow is to monitor issues in a Project Issues list (e.g. Project Lite, Project Standard & Project Structured). Once an issue is instantiated, the workflow waits a certain period (defined by the user) and checks that both the Assigned To field and Due Date fields are populated. If either of these fields is blank a notification email is sent to the Project Manager.

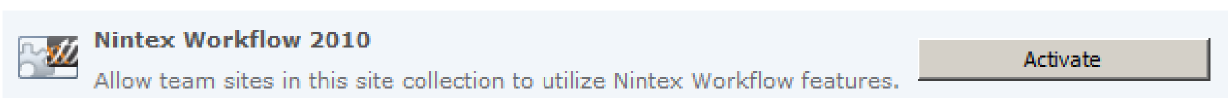
This document will go through a test scenario and explain the flow of the workflow.

Activate Nintex

Before Nintex can be used, the 'Nintex Workflow 2010' features needs to be activated at both a Site Collection and a Site Level.

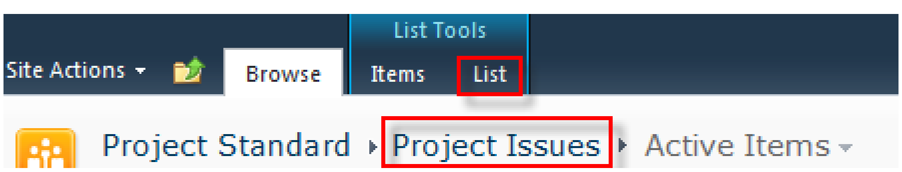
Below are the steps to activate the Nintex features

- Click on Site Actions, Site Settings
- Select Site Collection Features or Manage Site Features (depending if it is a Site Collection or a Site level)
- Activate Nintex workflow 2010

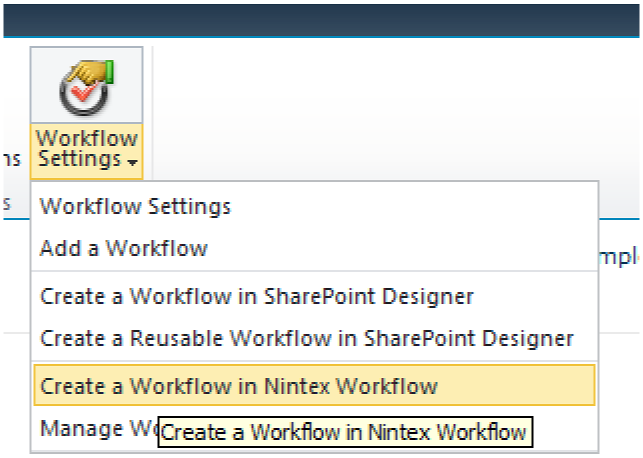


Add the Nintex Workflow to an Project Issues List

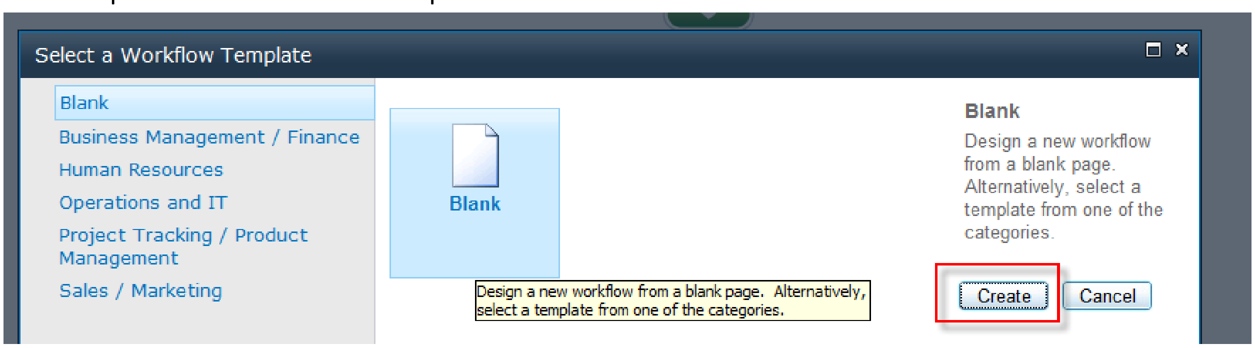
- Navigate to 'All site Content' and select Project Issues



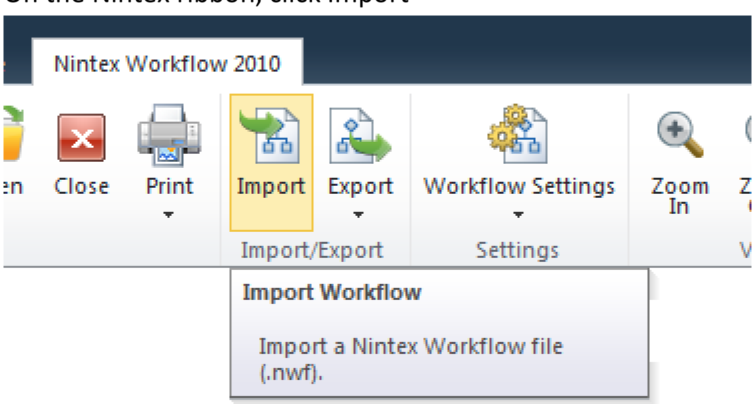
- Click on the List under List Tools Tab on the Ribbon
- Select Workflow Settings and click on 'Create a WorkFlow in Nintex Workflow'



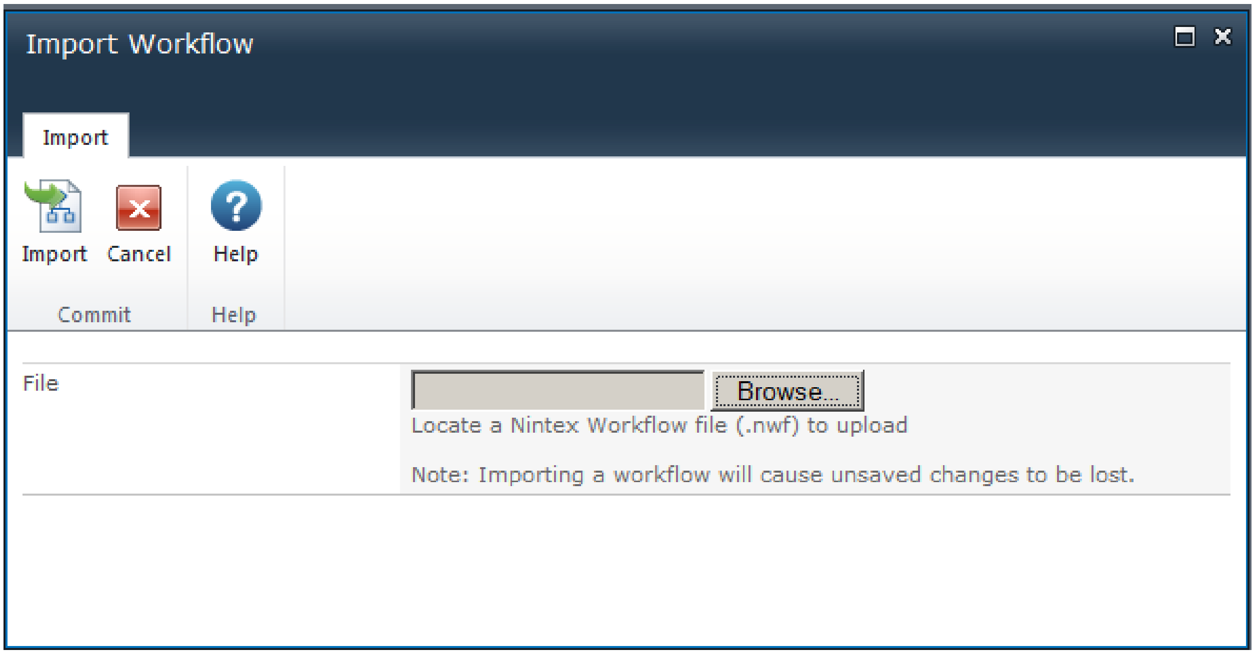
- The Nintex Workflow designer appears and you are prompted to create a new workflow based on a template. Select the Blank template. Click create button.



- On the Nintex ribbon, click Import



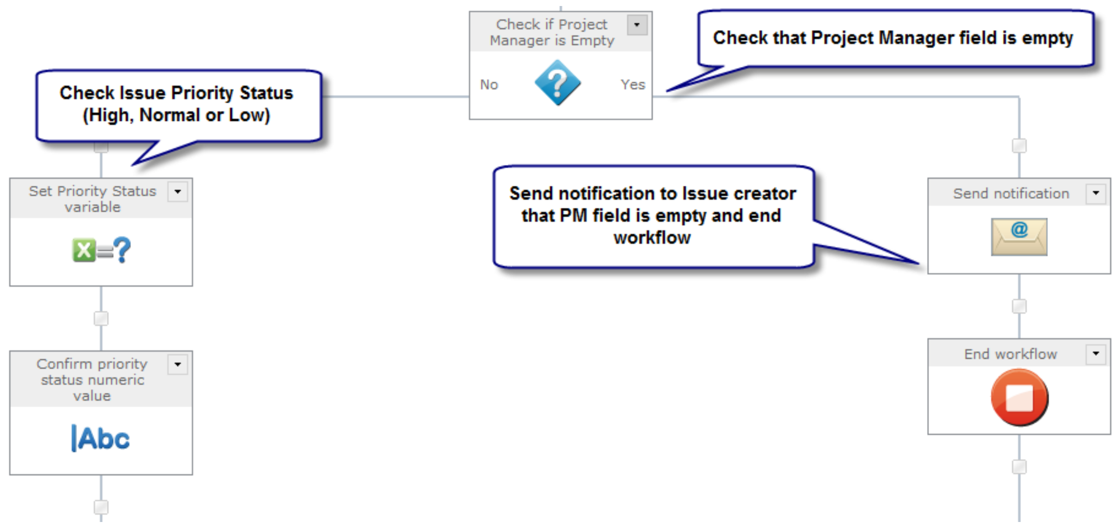
- Browse to the temp location from where you have downloaded the Nintex Workflow (.nwf) file.



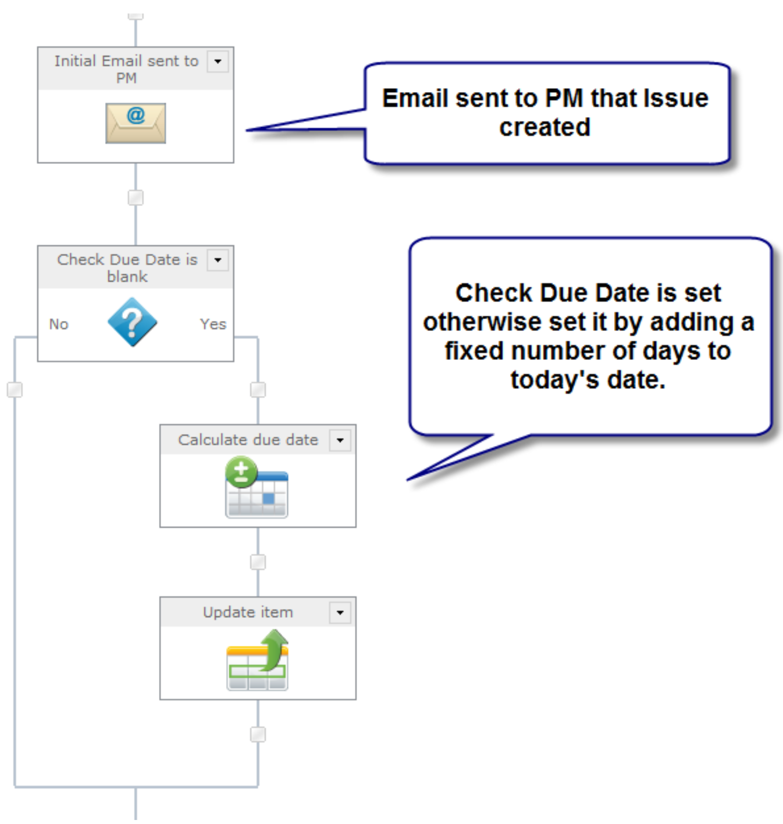
- Click Import

Workflow Sequence

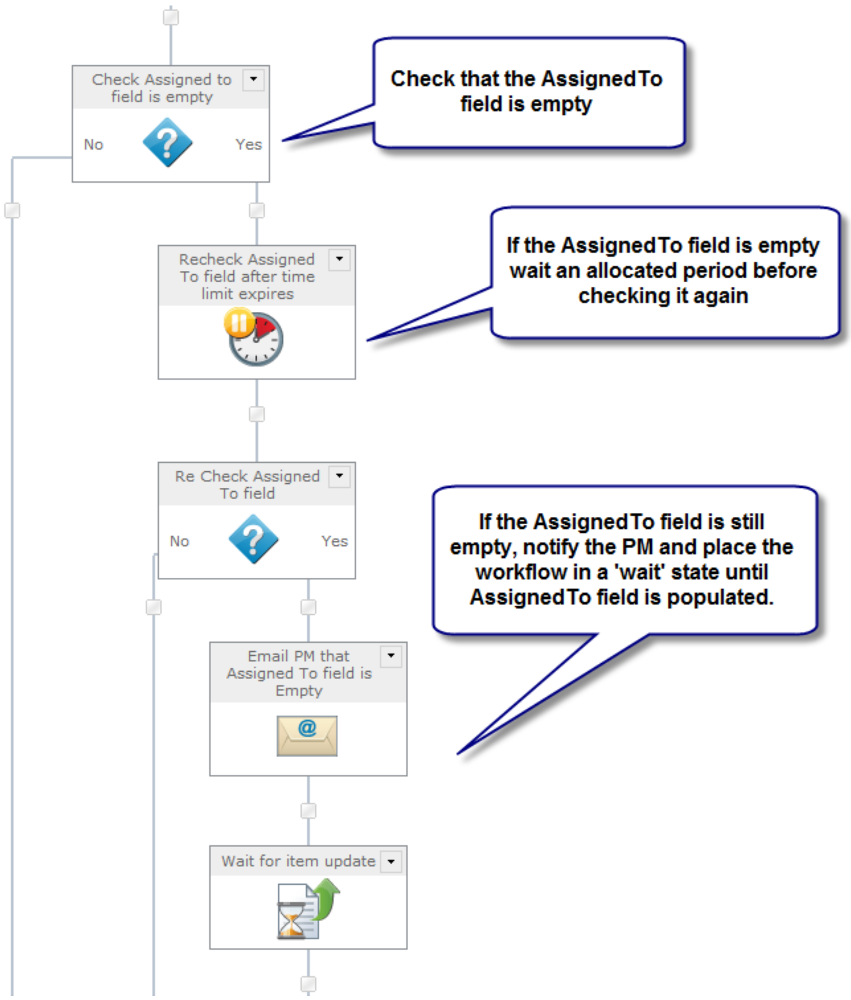
Stage 1:



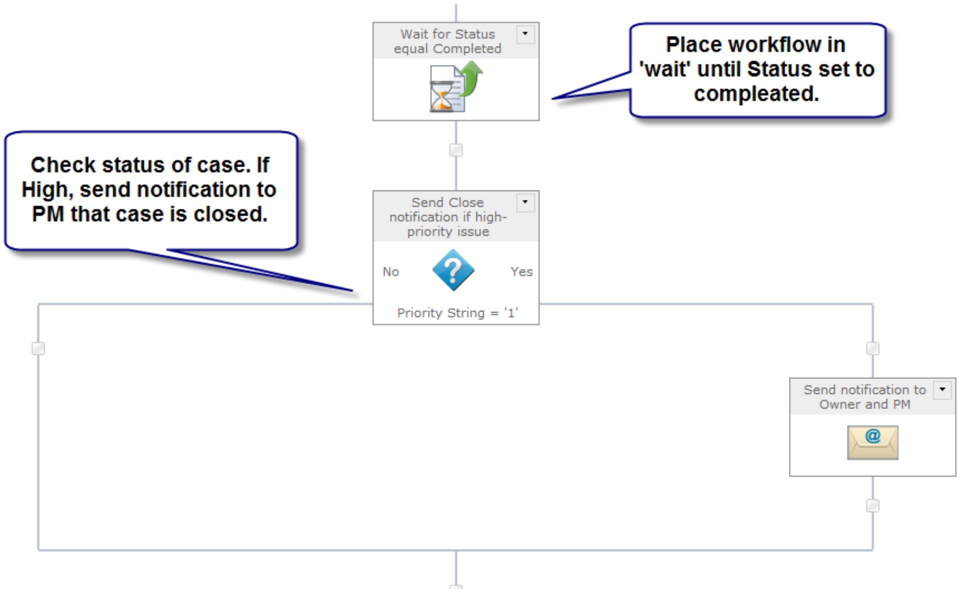
Stage 2



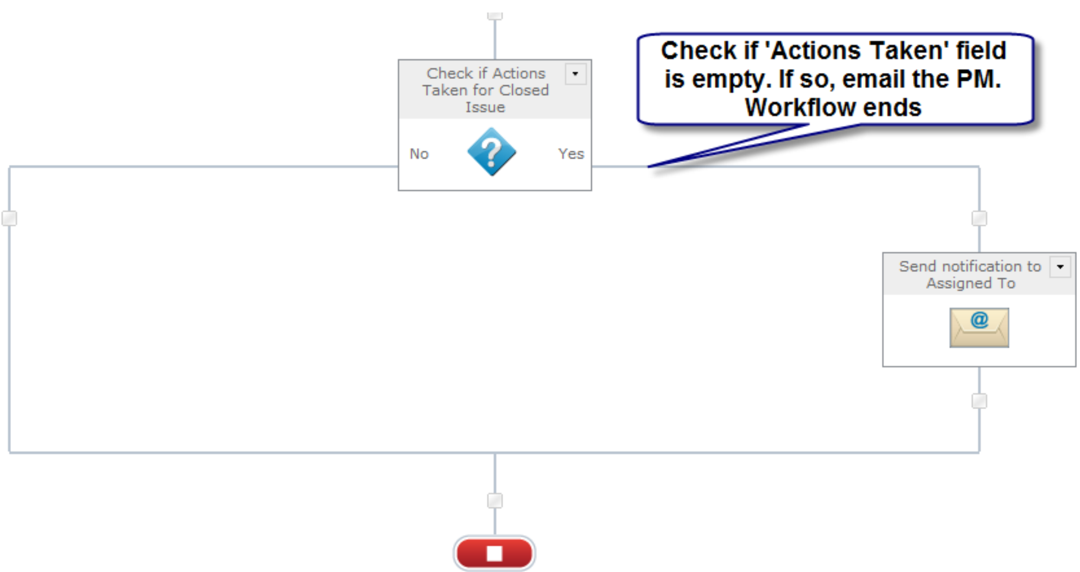
Stage 3


Check Assigned to field is empty
No
Yes
Check that the AssignedTo field is empty
Recheck Assigned To field after time limit expires
If the AssignedTo field is empty wait an allocated period before checking it again
Re Check Assigned To field
No
Yes
If the AssignedTo field is still empty, notify the PM and place the workflow in a 'wait' state until AssignedTo field is populated.
Email PM that Assigned To field is Empty
Wait for item update

Stage 4



Stage 5



Workflow Variables

The workflow contains a number of variables that be configured by the user using the Nintex Workflow designer. Depending on the type of BrightWork Project the user has created (e.g. Project Lite, Project Standard, and Project Structured), variables can be changed

Example: For an Issues List in a **Project Standard** site, if the priority status is **High**, the workflow will wait 2 hours (i.e. set Time Limit - user_HighTimeLimit to 2) before checking the assigned to field (refer to stage 3 above) . Also for High Priority Issues, due date will be updated (i.e. set Due Date - user_High_DueDateDays to 2) 2 days from the creation date.

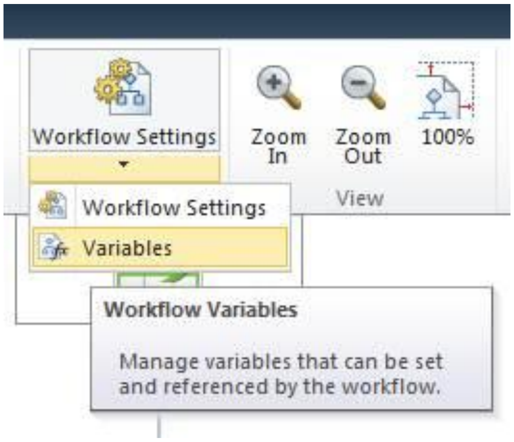
Column Variable Name Descriptions

Priority – The Priority status of the Issue Created.
Time Limit – The interval time before the Assigned To field is checked if it's empty.
Due Date – Enter the number of days to add to creation date.

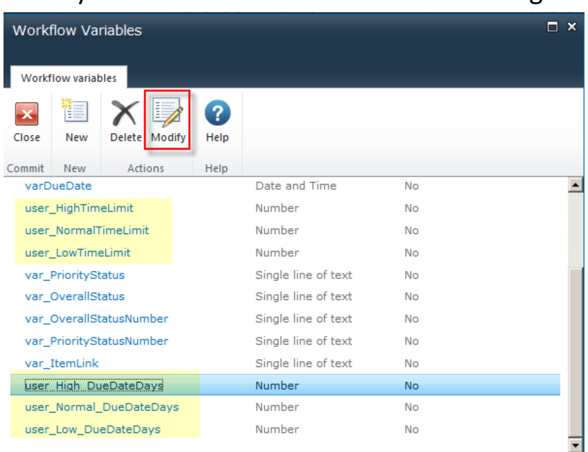
Priority	Time Limit	Due Date
High	user_HighTimeLimit	user_High_BusinessDays
Normal	user_NormalTimeLimit	user_Normal_BusinessDays
Low	user_LowTimeLimit	user_Low_BusinessDays

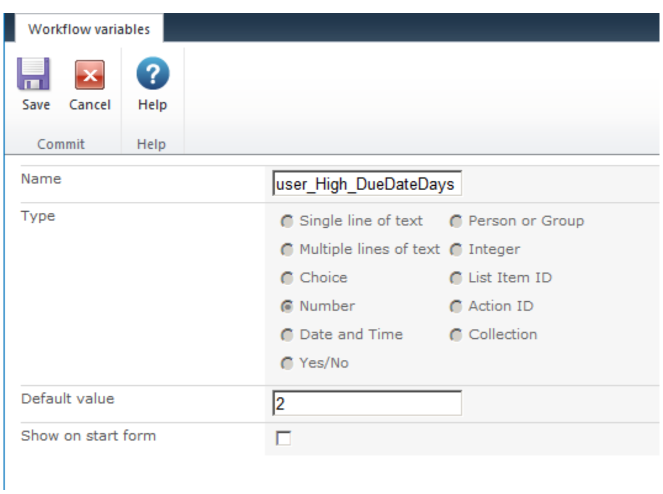
Edit Workflow Variables

- Select Workflow Settings, Variables from the menu.



- Modify the Variable default values and change the default value.

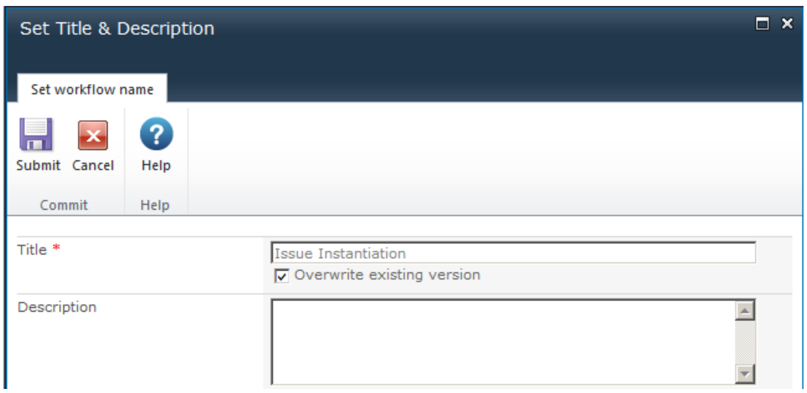




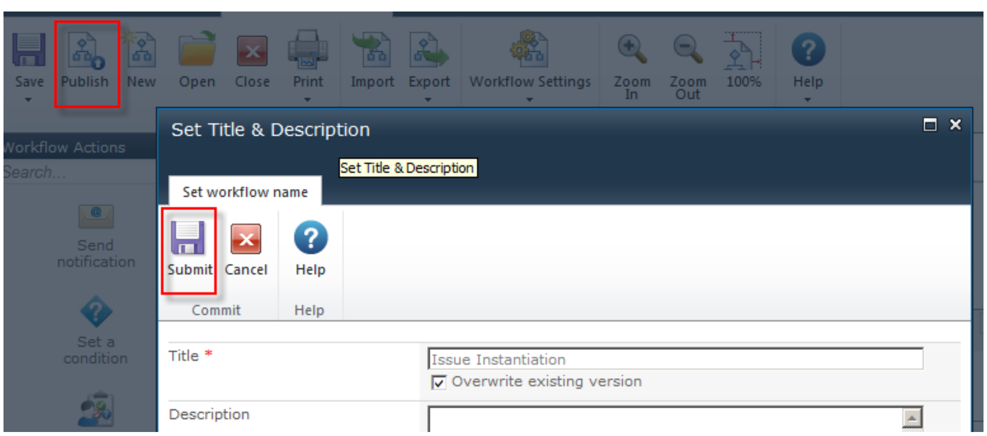
Publish Workflow

- Navigate to the ribbon on the Nintex Designer and select save.

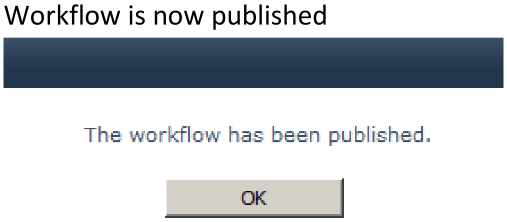
- Click Submit



- Finally click on the Publish button and click submit



- Workflow is now published



Sample Project Settings

Project Lite

Priority	Time Limit	Due Date
High	4hrs	5 days
Normal	4hrs	7 days
Low	24hrs	21 days

Project Standard

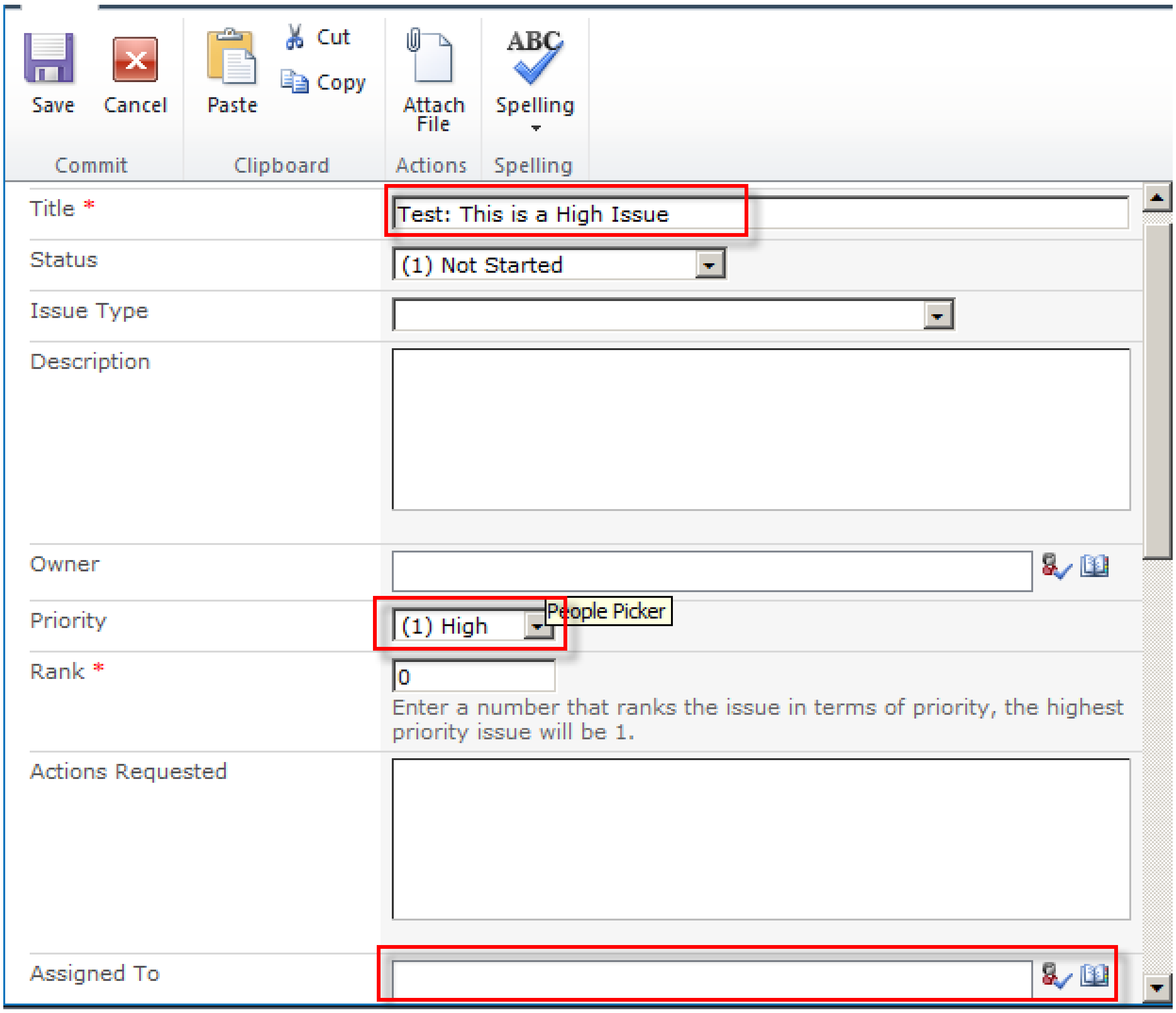
Priority	Time Limit	Due Date
High	2hrs	2 days
Normal	2hrs	5 days
Low	24hrs	14 days

Project Structured

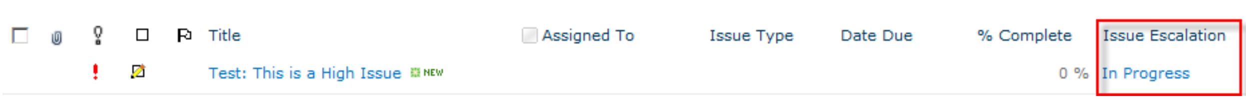
Priority	Time Limit	Due Date
High	0hrs	2 days
Normal	0hrs	5 days
Low	24hrs	10 days

Example Issue Instantiation:

Step 1: Create a new High Issue, leaving the Assigned To field blank.



Step 2: Once the issue is created an 'In Progress' flag is displayed at the end of the issue



Step 3: Confirm the due date is updated by refreshing the items.

Step 4: Confirm an email is issued to the Project Manager stating that a high case is logged

This message was sent with High importance.
From: rmartin@brightwork.com
To: Rory Martin
Cc:
Subject: A High Priority Issue has been logged for Project Standard

A issue of high priority has been logged in Project Standard by AIMWARE-INET\rmartin.

Title: Test: This is a High Issue

Description:

Step 5: Confirm the time delay.

Step 6: An Email is issued to the Project Manager informing them that the Assigned To field for the issue is blank.

This message was sent with High importance.
From: rmartin@brightwork.com
To: Rory Martin
Cc:
Subject: Issue Escalation: Test: This is a High Issue

** Issue Escalation: Test: This is a High Issue**

The Assigned To field for this issue is blank.

Step 7: Close the issue, set status flag to completed

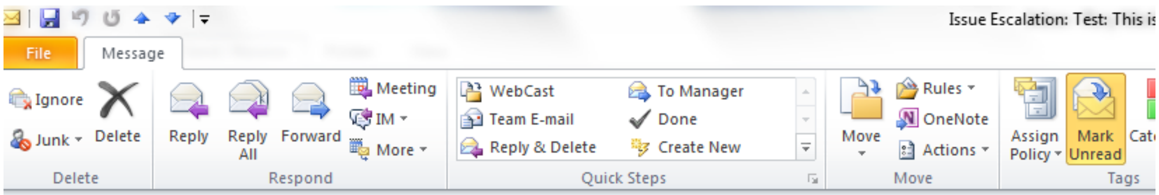
Title *	Test: This is a High Issue
Status	(3) Completed

Step 8: Confirm the following emails were delivered after the Issue was completed.

From: rmartin@brightwork.com
To: Rory Martin
Cc:
Subject: Test: This is a High Issue has been closed

High priority issue Test: This is a High Issue for Project Standard has been set to (3) Completed by AIMWARE-INET\rmartin.

Actions Taken:



From: rmartin@brightwork.com
To: Rory Martin
Cc:
Subject: Issue Escalation: Test: This is a High Issue

Warning! You recently closed the issue Test: This is a High Issue for Project Standard without describing the Actions Taken.