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Create a Workspace

How to create the simplest workflow possible

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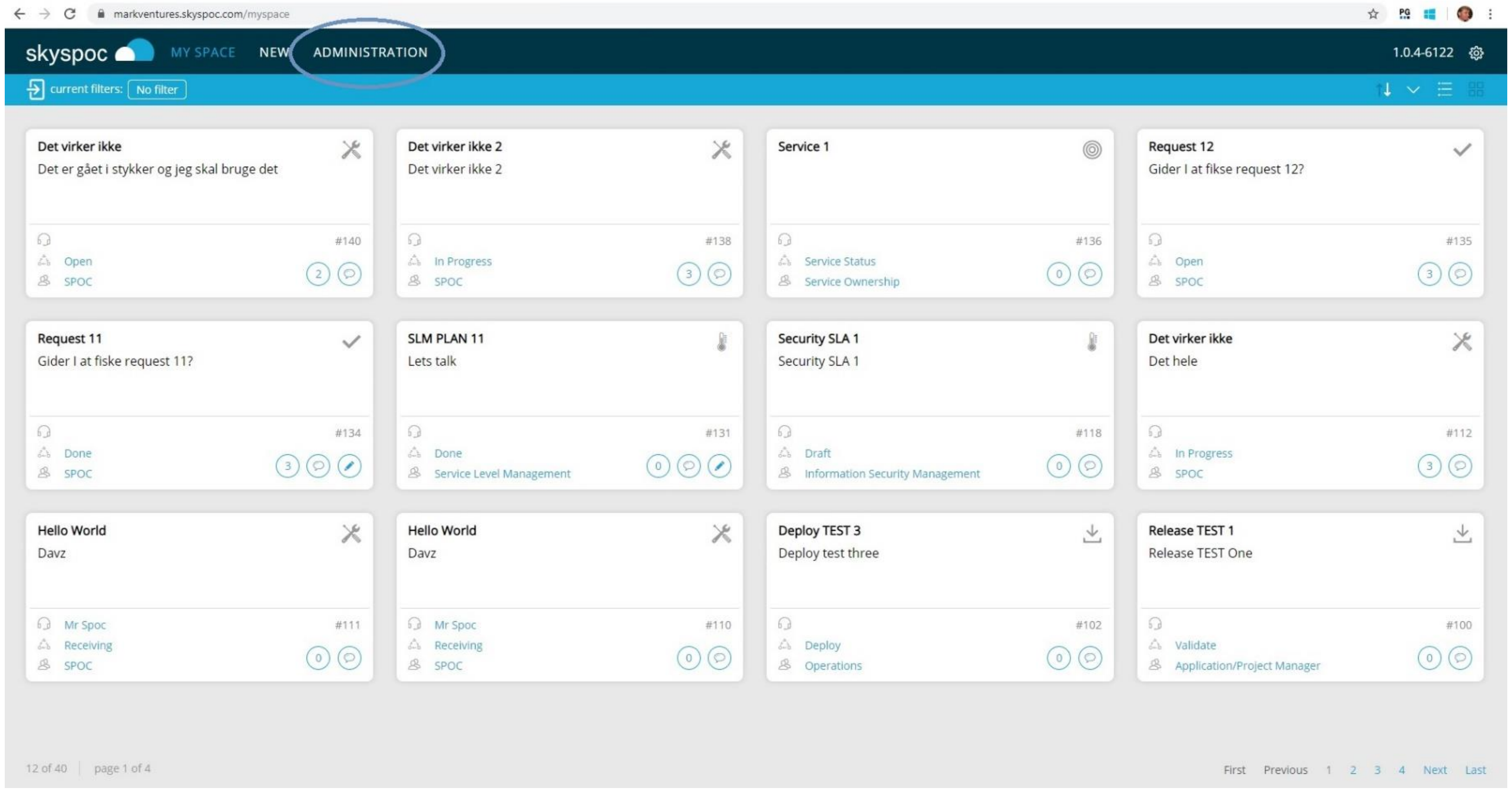
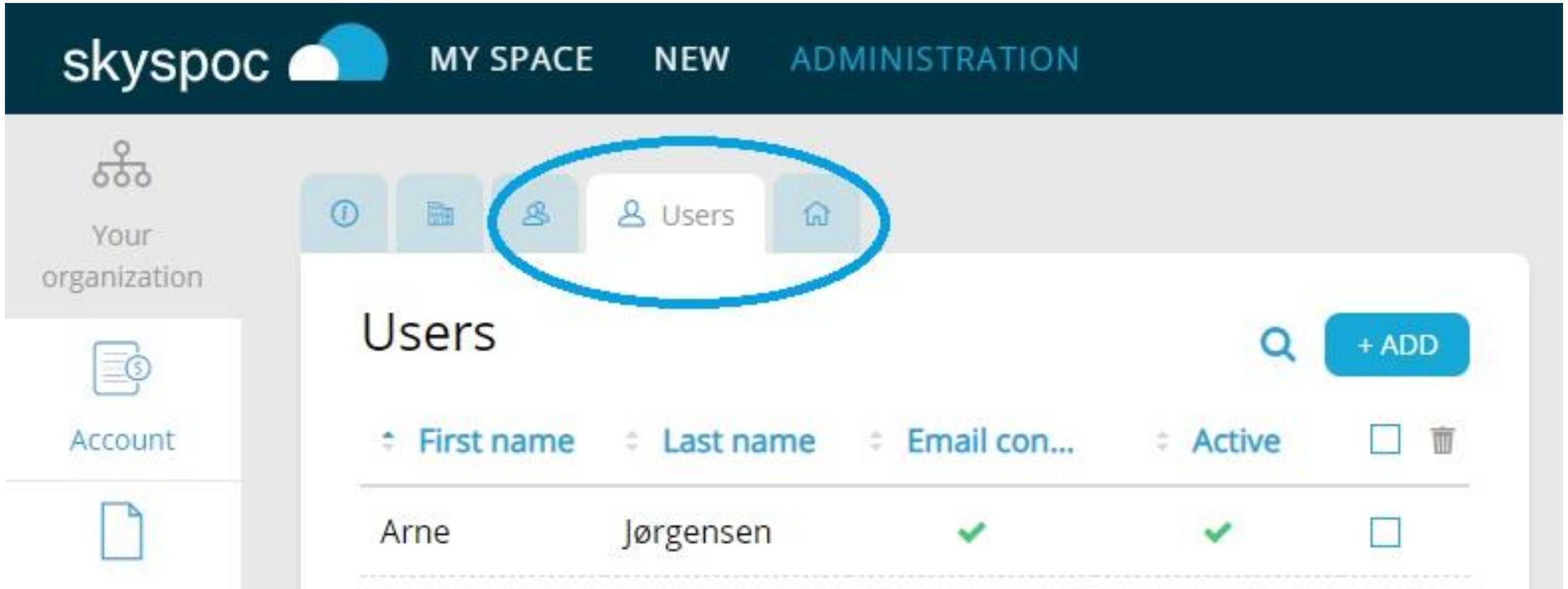
Log into your tenant

Click on the menu ADMINISTRATION



Prerequisites

Click on Your organization and then Users



Click on your user in your tenant

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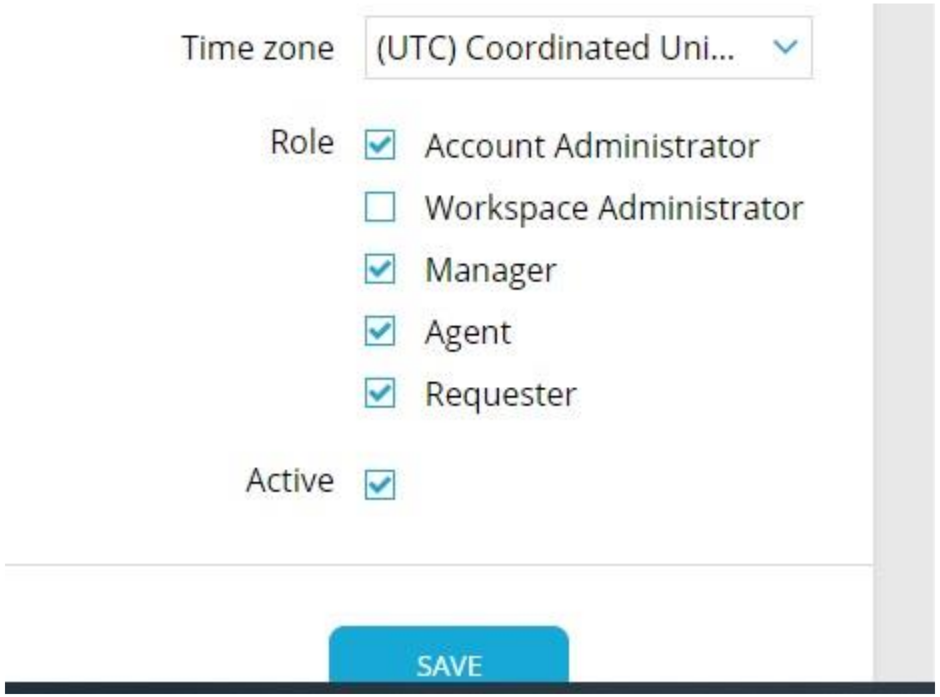
Prerequisites

(Besides Account Administrator).

Make sure that
- Manager
- Agent
- Requester

are selected

- Click **SAVE**



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Prerequisites

In this showcase you want to create one Team:

- Team (Name of your processing unit)

To Build a Workspace i Skyspoc, you need to prepare for at least one category (they come in handy, when you whish to monitor the activity in the published workflow)

- Category

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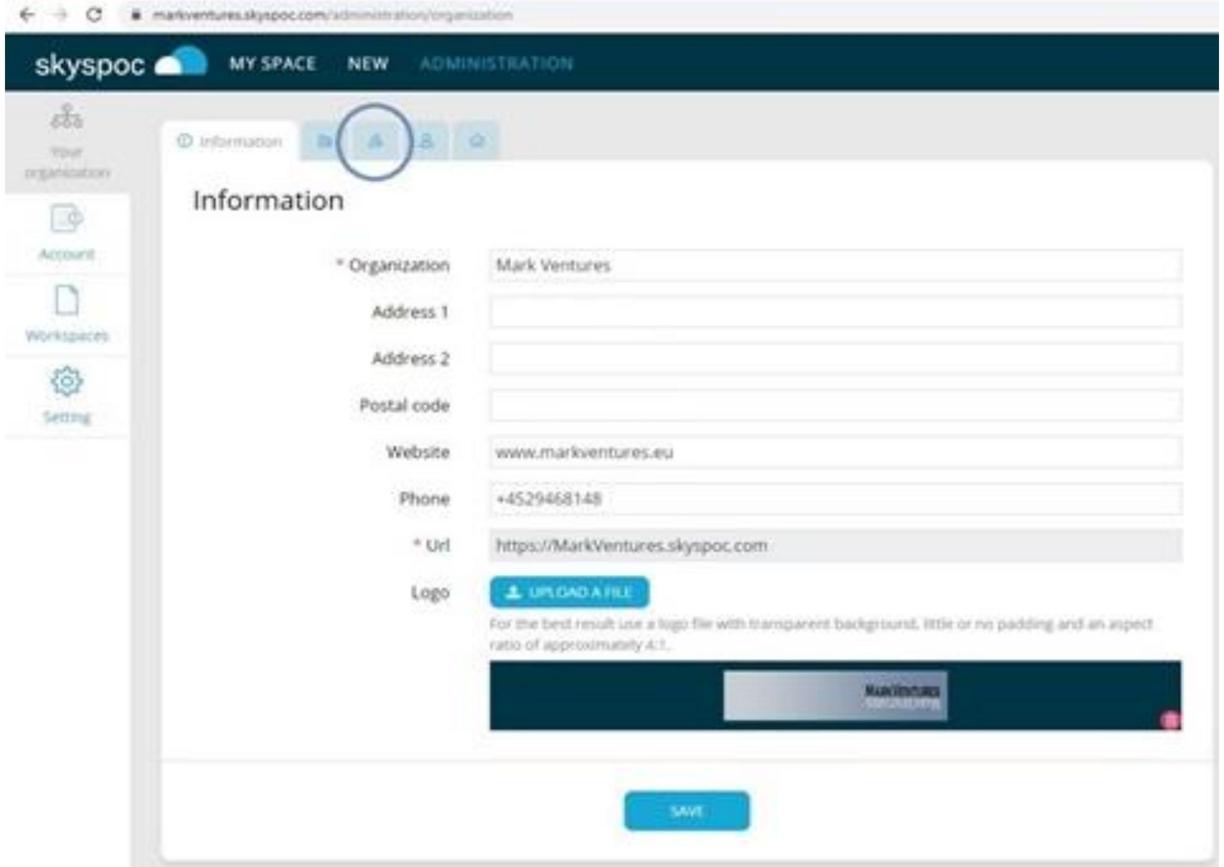
Prerequisites

Prepare Team

- Click the Teams tab



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Prerequisites

Prepare Team

+ADD (a team)

- (”Yes" – you whish to apply the team in your workspaces)
- Enter name of the Team and click on **ADD** (e.g. SPOC)
- Click the Person icon and enter Edit Users (x)
- Choose desired user in the list **Add new user**
- Select **Add**

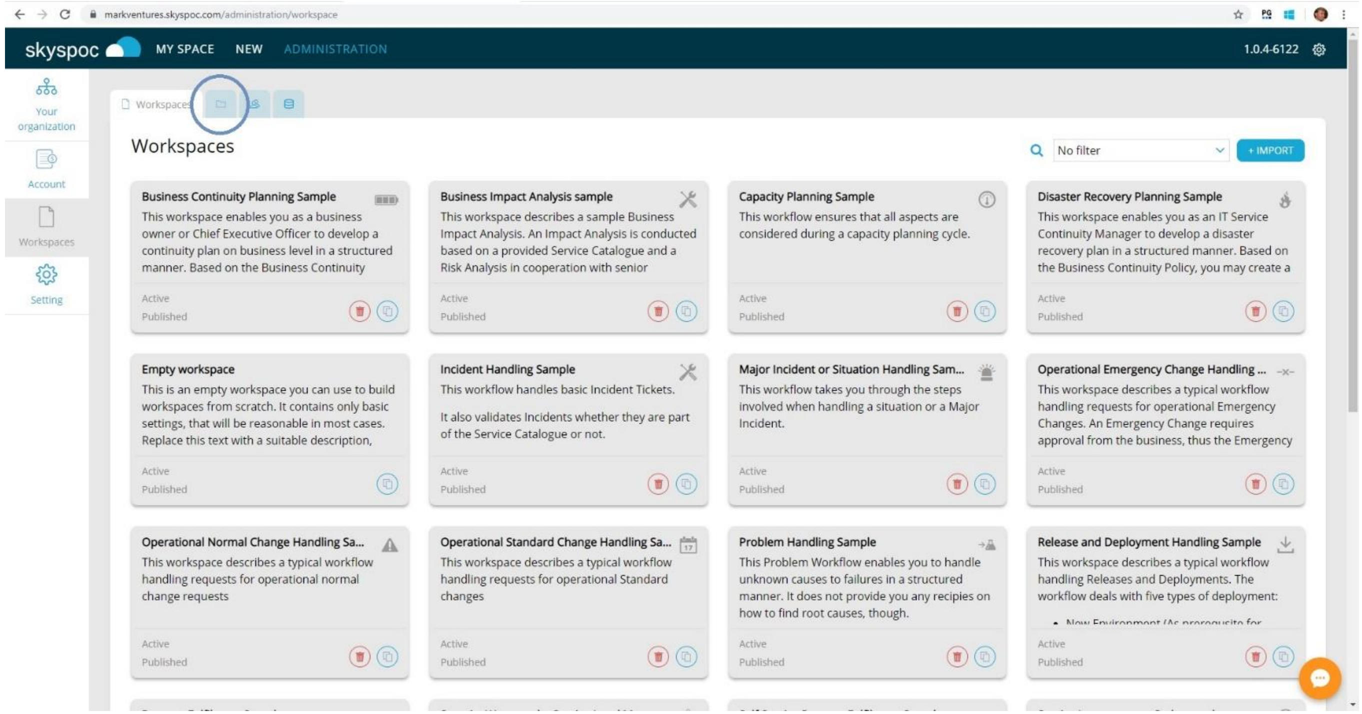
Note the name of the team you’ve just added

(No need for further teams in this sample, but you may repeat the above for every further Team you might require)

Prerequisites

Prepare Categories

- Click Workspaces
- Click the Categories tab



Prerequisites

Prepare Categories

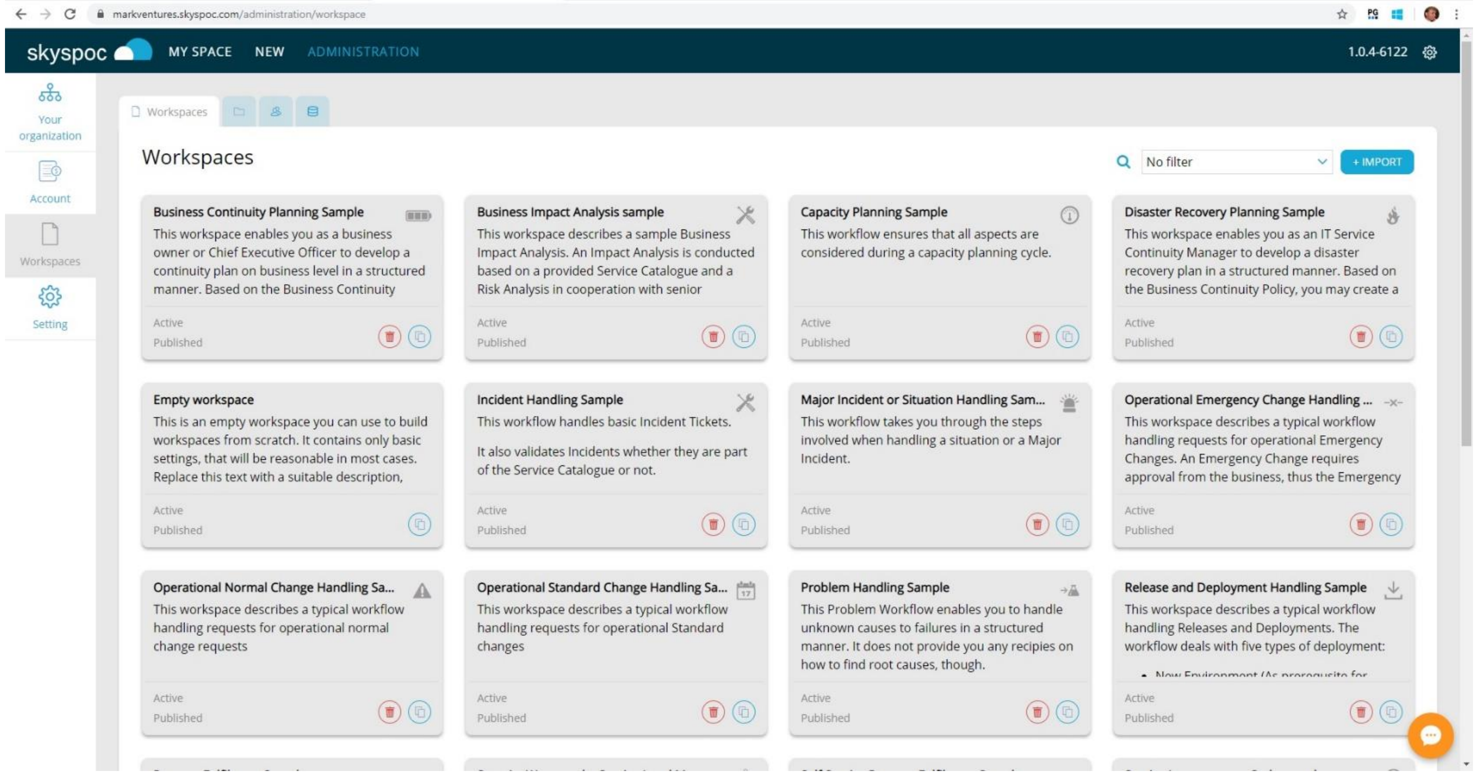
+ADD (a category)

- (If tou are creating a main category you do *not* alter **Parent category**)
- Enter name of the category
  - You may enter a **Description**
- Click **Add**

CLONE

You are now ready to create your first workspace.

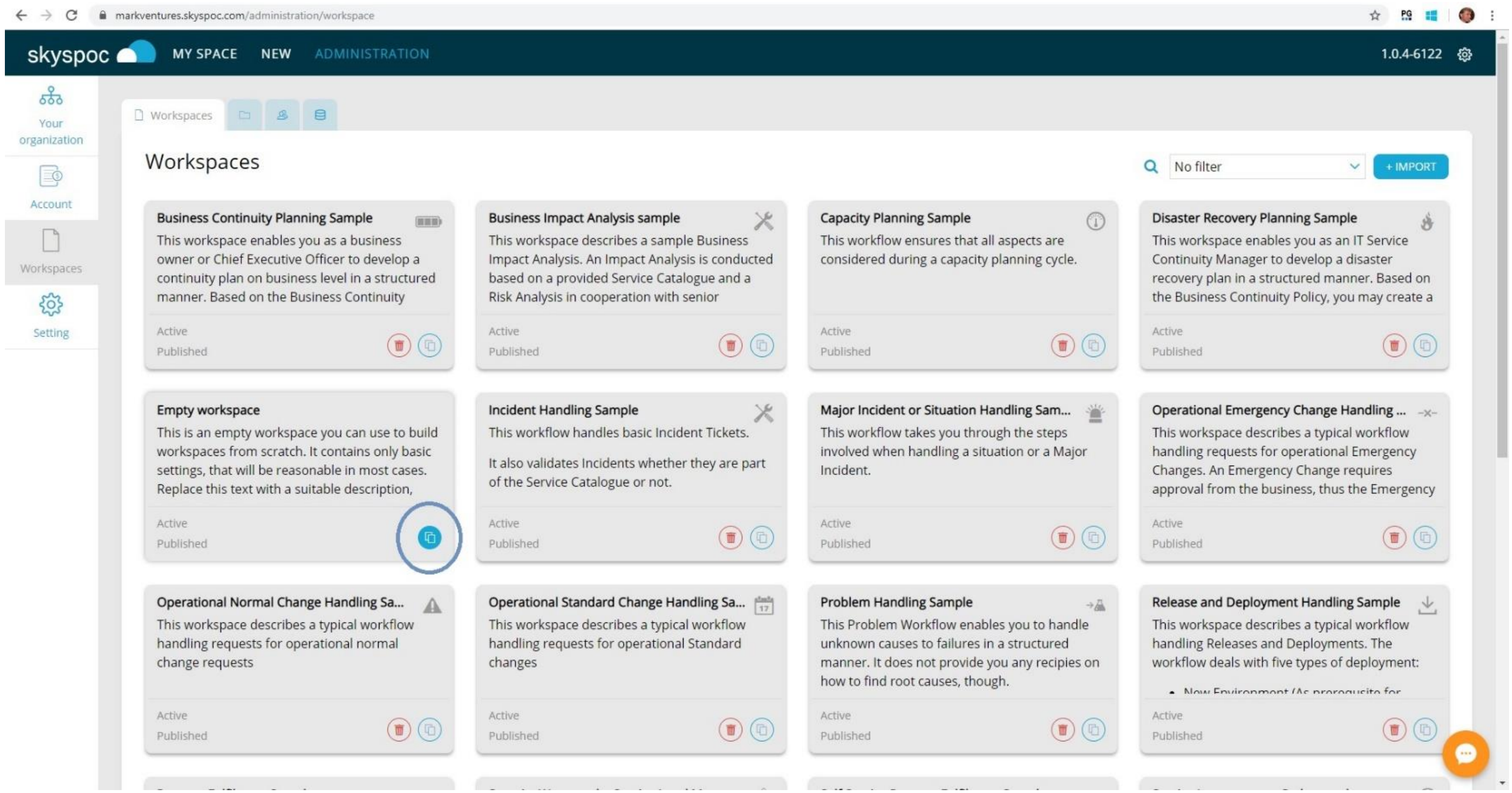
Click the Workspace Tab:



Workspace

Create Workspace

- Clone **Empty workspace**



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Workspace

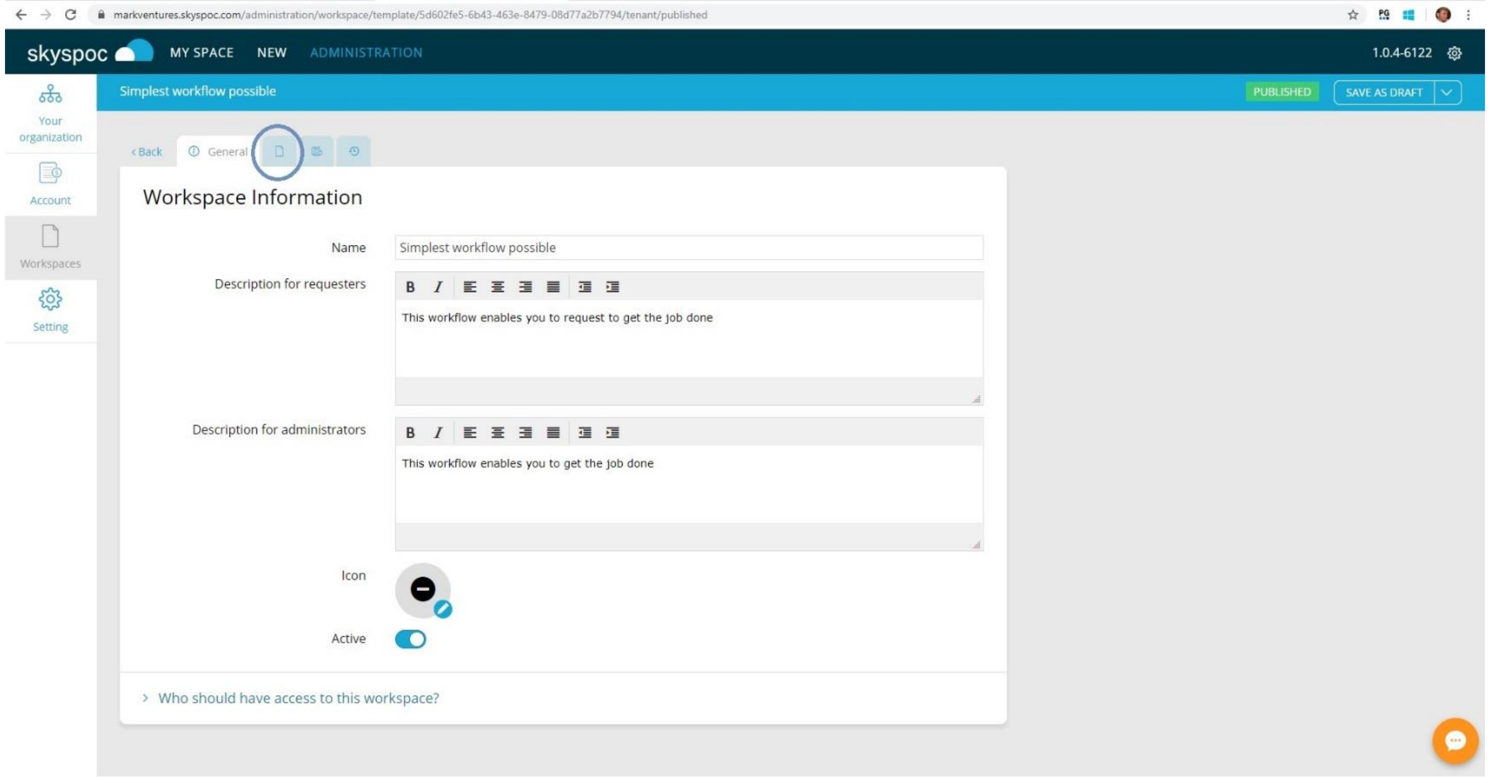
Create Workspace

- Alter name in the Name field
- Alter text in Description for Requesters (Becomes visible for end-users)
- Alter text in Description for Administrators (Becomes visible for administrators only)
- Select **Clone** in upper right corner

Workspace

Select categories

- Select your Workspace (by clicking in **Workspaces**)
- Click **Document**



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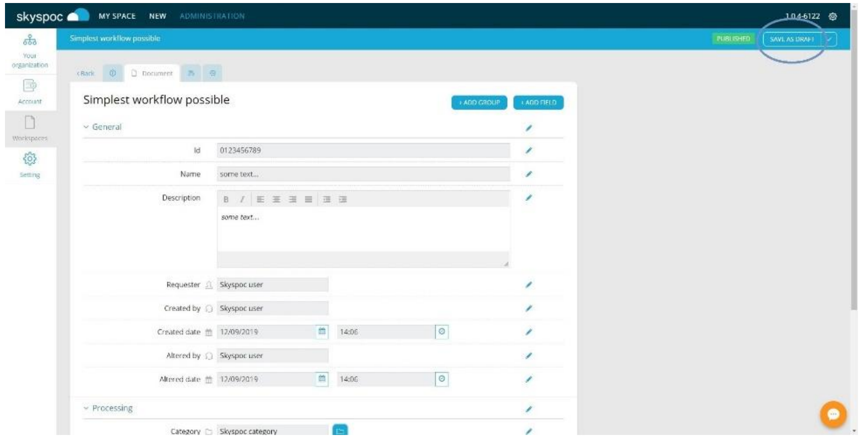
Workspace

Select categories

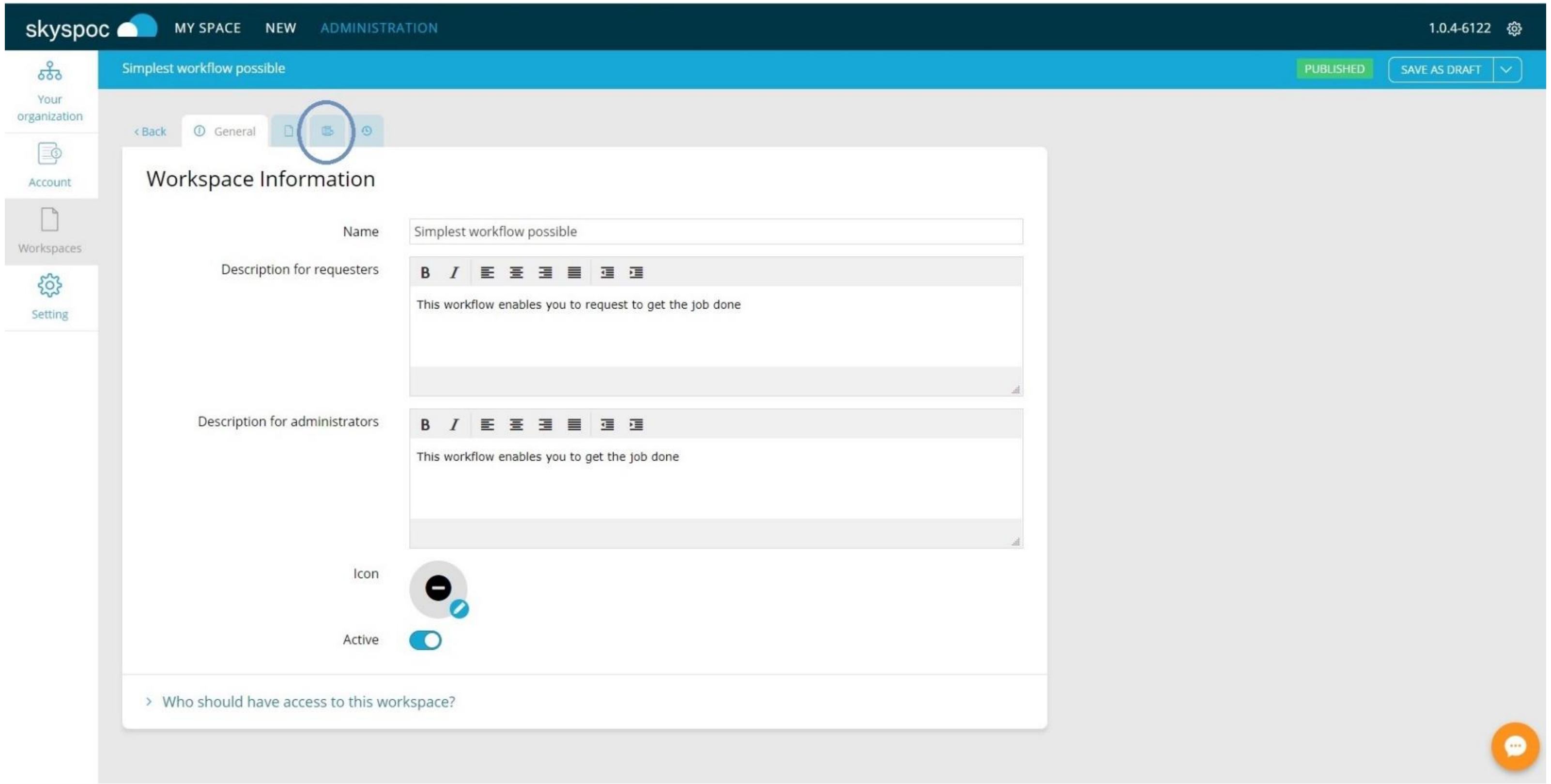
- Find the field Category 🗁 and click the blue folder 🗁
- Select at least one category ☑
- Click **Choose**
- You may now click **SAVE AS DRAFT** in upper right corner



Workspace

Edit Workspace

- Click **Flow**



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Workspace

Make Team visible

- Focus on the All users lane
- Click the pencil (Stage details) in the stage ‘Done’

Workspace

Make Team visible

- Click the blue Teams icon
- Select your Team in the field ‘Add new team’

(Remember the name of the the team you’ve just added)

You may enter the name in the box right to ‘Add new team’

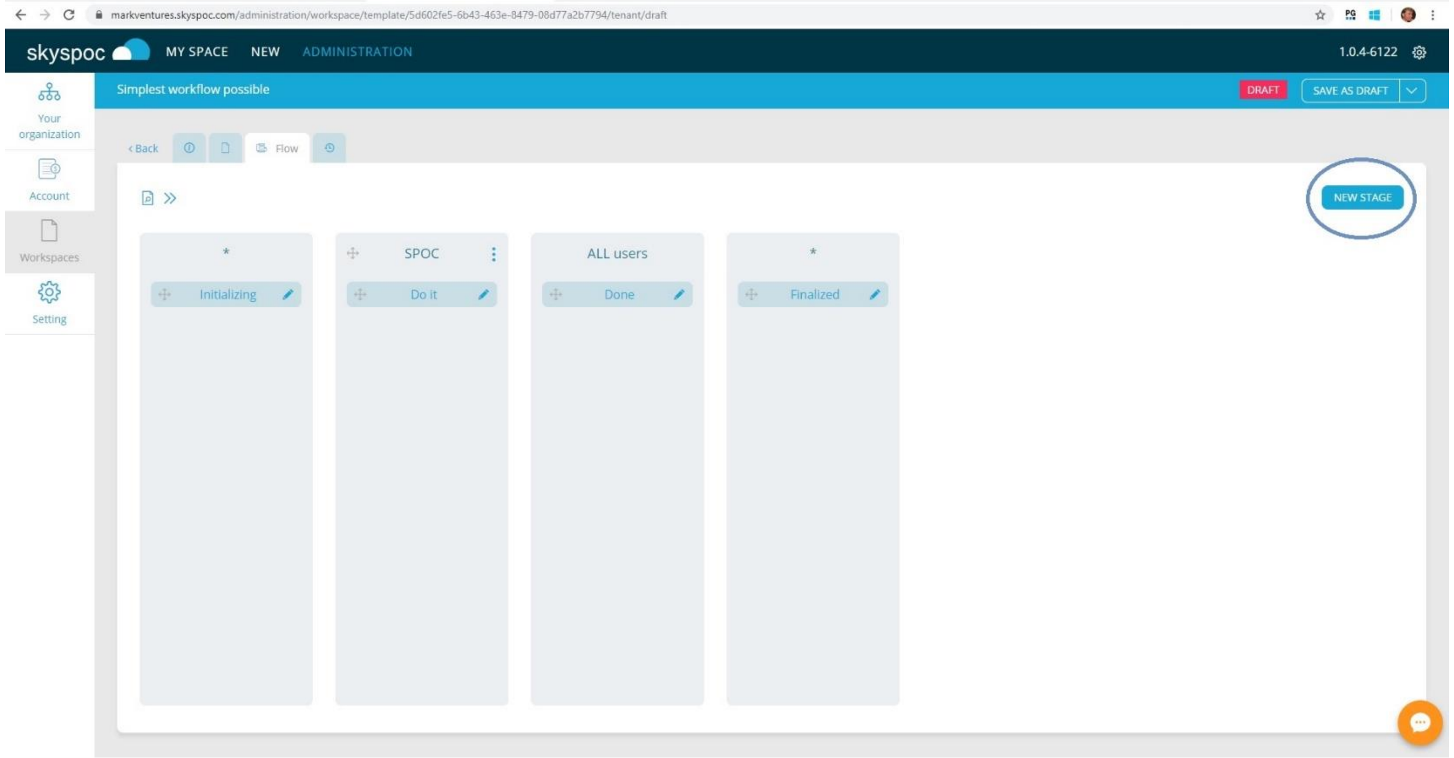
- Click **ADD**
- Click **Close**
- Click **Save**

The Team now has its own lane

Workspace

Create new stage

- Click **New Stage**



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Workspace

Create new stage

- Enter ”Request” in the name field (← Exact name – please)
- Click the blue triangle at the end of ‘State’
- Enter ”Do the Job” in the field ‘Add new state’
- Click ADD
- Click Close
- Select ”Do the Job” in ‘State’
- Select the Team that you previously created in the Team Field
- Click ADD

The lane is now populated with your new stage

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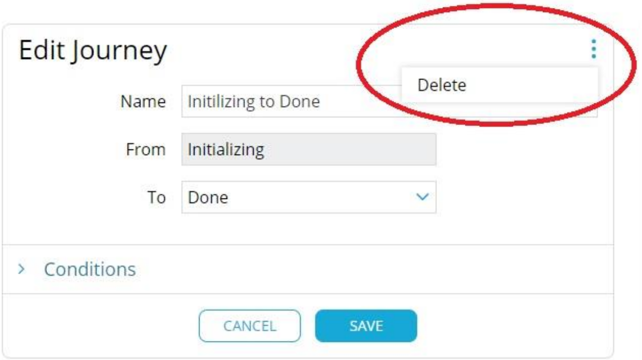
Workspace

Delete stage in logical flow – Initilizing to Done

- Click the pencil (Stage details) in the stage ‘Initializing’
- Click > Departures to (In the bottom of the screen)
- Click the pencil next to ‘Initilizing to Done’
- In the upper right corner you click on the three dots.
- Choose and click on ”Delete”
- ”Are you sure you want to delete this transition?”

– Click DELETE



Workspace

Insert new stage in logical flow – Initalize to Do It

Stay on the (Stage Details) in the state 'Initializing'

- Click the ⊕ to Add new (Under > Departures to)
- In the Name field you enter to text ”From Initializing to Request”
- In the field To (”Finalized”) you replace with ”Request”
- Click **ADD**
- Click **SAVE**

Workspace

Insert new stage in logical flow – Add Current Stage

- Click the pencil (Stage details) in the stage ‘Request’
- Click > Field rules for this stage
- Click the ⊕ (Add new)
- Select ‘Current Stage’ in field
- Click + ADD Rule below Who should have access to the field
- In the field Team/User you select your Team
- Keep the attribute ‘Write’
- Click ADD
- Click ADD
- Click Save

Workspace

Insert new stage in logical flow – Do it to Done

- Click the pencil (Stage details) in the stage ‘Request’
- Click > Departures to
- Click the (Add new)
- In the Name field you enter the text ”Request to Done”
- In the field To you select ”Done”.
- Click **ADD**
- Click **Save**
- Click **SAVE AS DRAFT**
- Click **SAVE & PUBLISH**

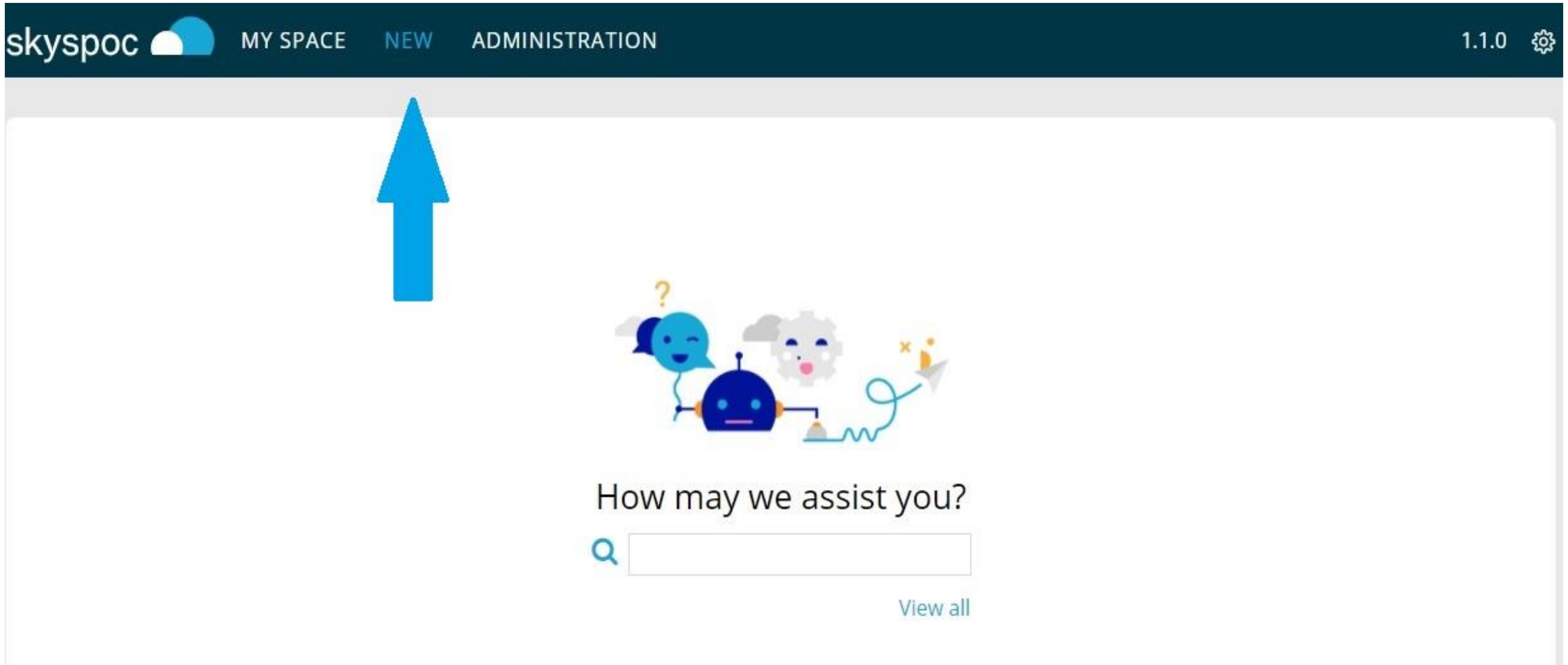
Workspace

Workspace Ready

Workspace Ready

You may test your new workspace as an Administrator, which is your current profile.

Submit a new document, by choosing NEW in the Home Page:



- Click View All
- Select your (only) Workspace
- Click NEW

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Workspace Ready

You need only to enter Name

Then you may SUBMIT

Your first document is created!

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