Welcome to your Quick Tour!

Goal: Your quick tour aims to give you a high level overview of a few features before we drill down into much more detail.

Objective: In 10 minutes or less, experience editing, running and tracking a process. Get a feel for strake/IR and want to learn more!

Plan:

Step 1: Log in – 1 minute or less

Step 2: Edit a Process – 3 minutes

Step 3: Run Your Process – 3 minutes
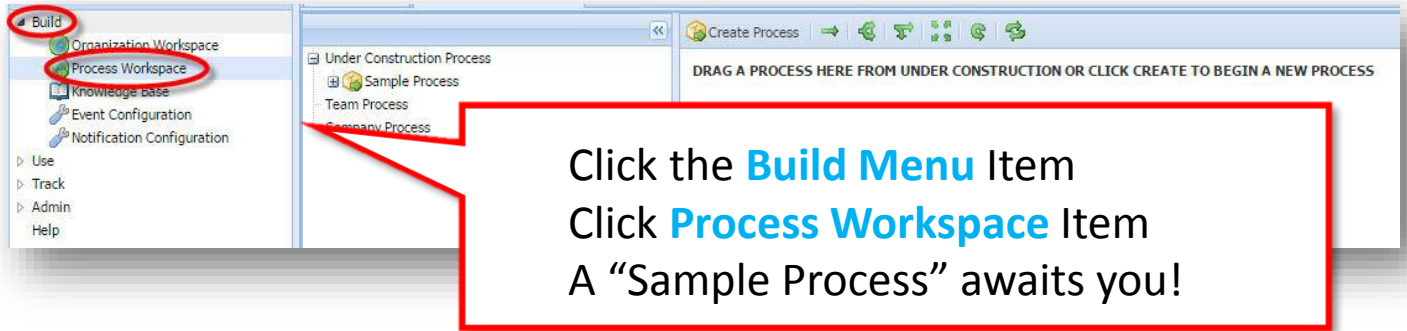
Step 4: Now Complete a Task – 1 minute

Step 5: Track Your Process – 1 minute

Note:

Our Support section has detailed videos and articles on every feature of our product. The quick tour is to get your feet wet before the big dive! And in case you need it, we provide swimming lesson for every level, beginner to advanced!
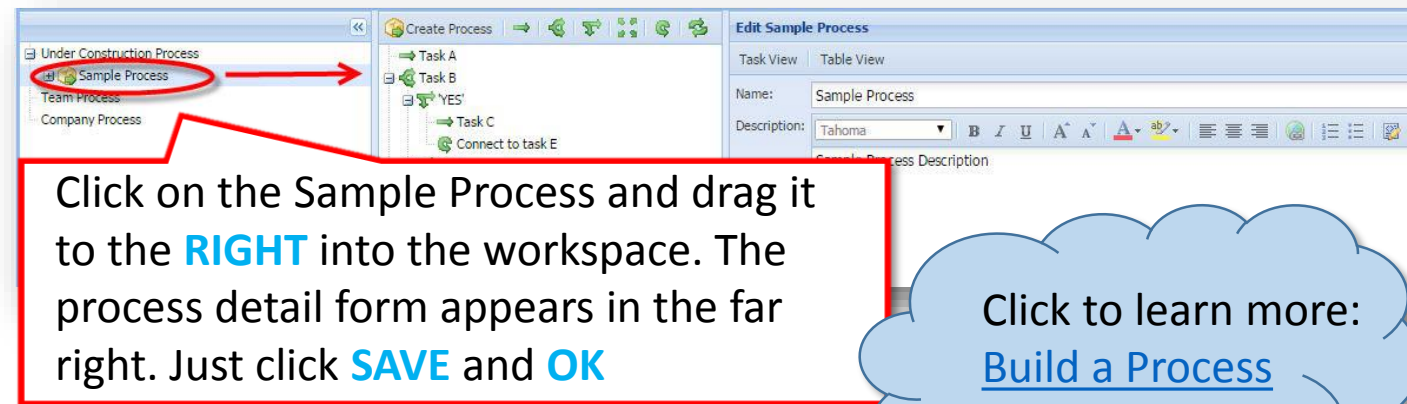
Step 1: Log in! Return to your activation email if you have
not created your password and log in directly from that link.
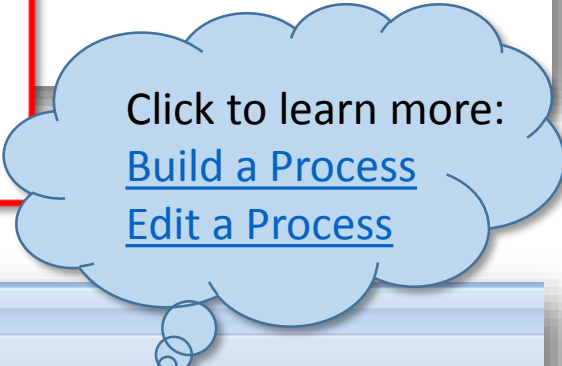If your account is created, login here

Step 2: Edit a Process!

Click the **Build Menu** Item
Click **Process Workspace** Item
A "Sample Process" awaits you!
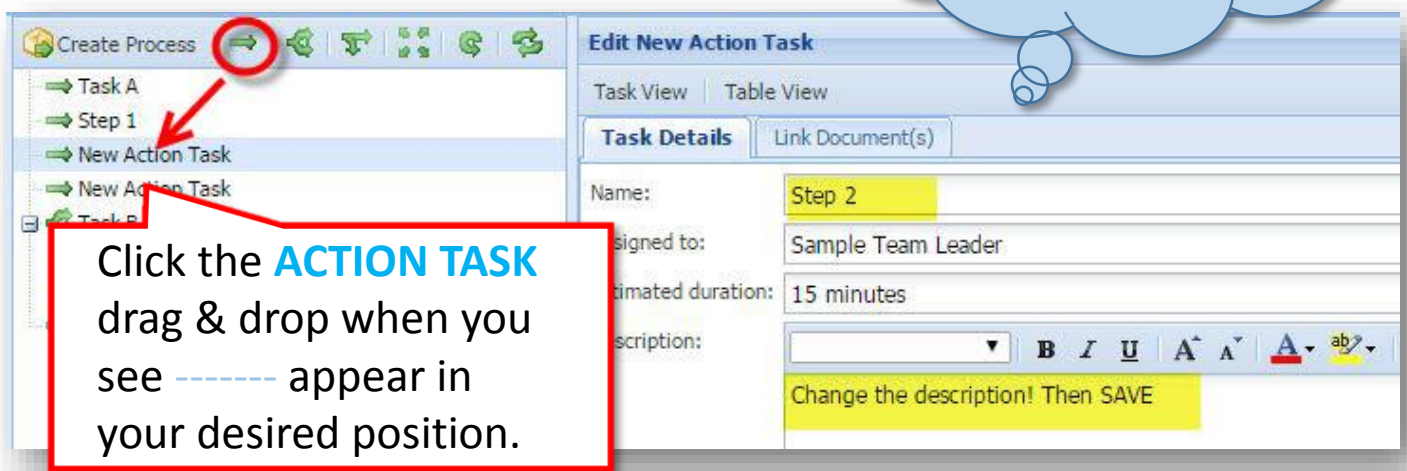
Click on the Sample Process and drag it
to the **RIGHT** into the workspace. The
process detail form appears in the far
right. Just click **SAVE** and **OK**

Click to learn more:
Build a Process
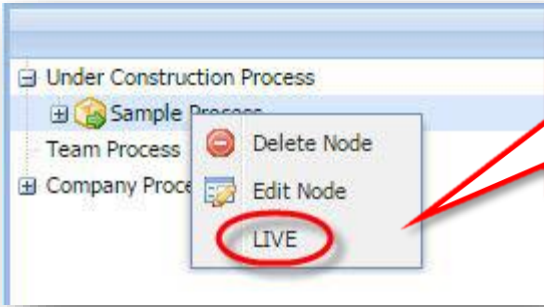Edit a Process

Click the **ACTION TASK**
drag & drop when you
see -------- appear in
your desired position.

Edit the fields in the form & **SAVE**. Repeat until you are
comfortable with the action!

Step 3: Run Your Process

RIGHT click process name and click **LIVE** so you can run it! Click **OK**
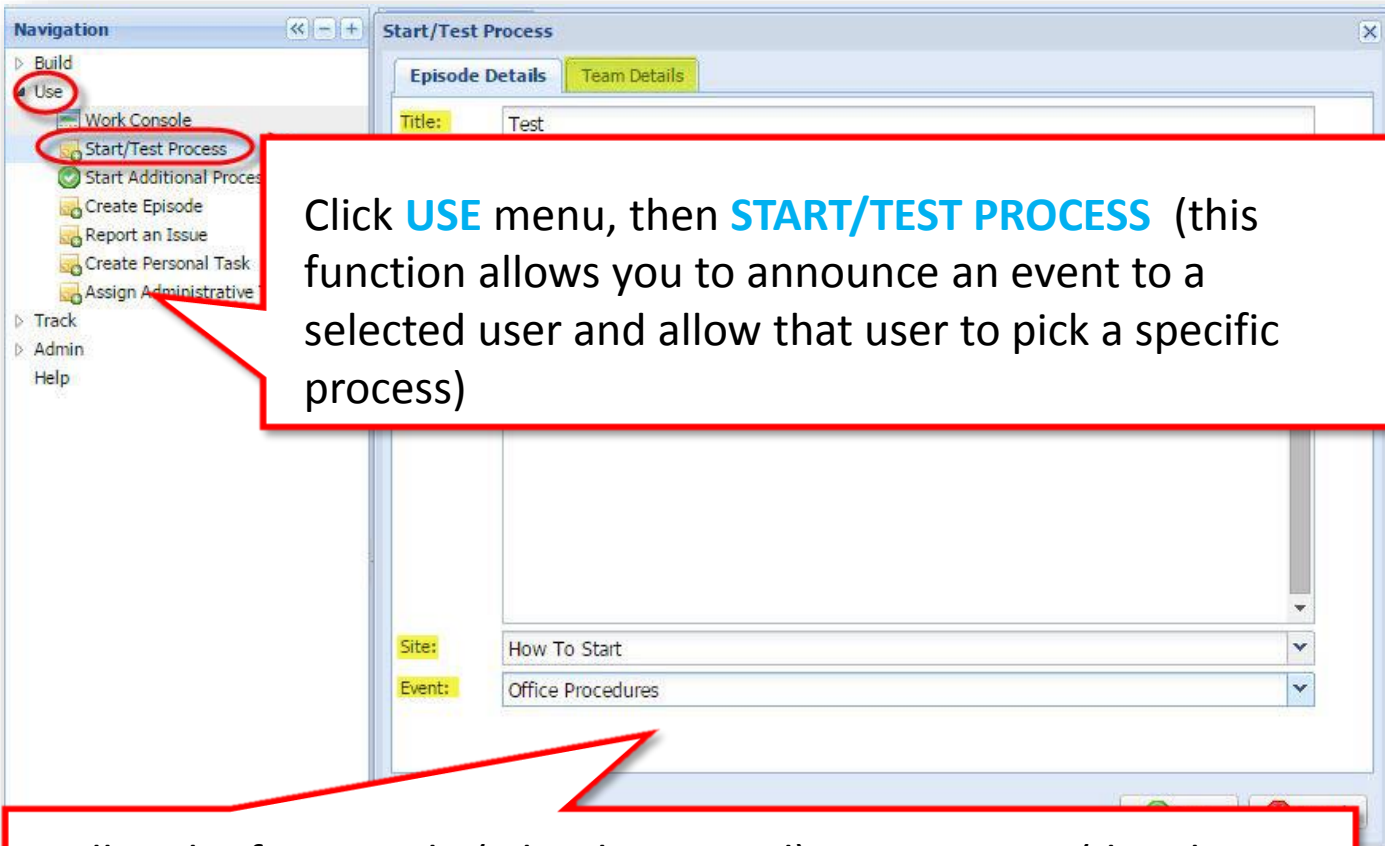
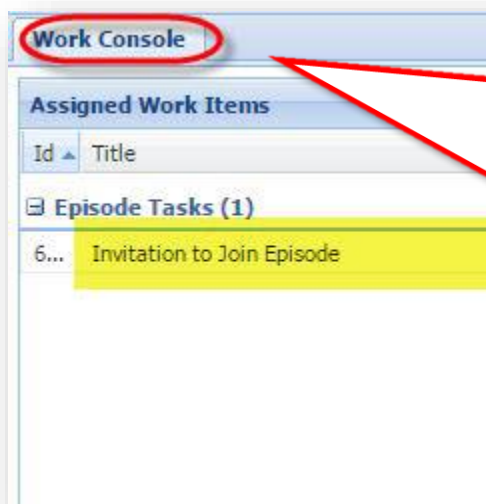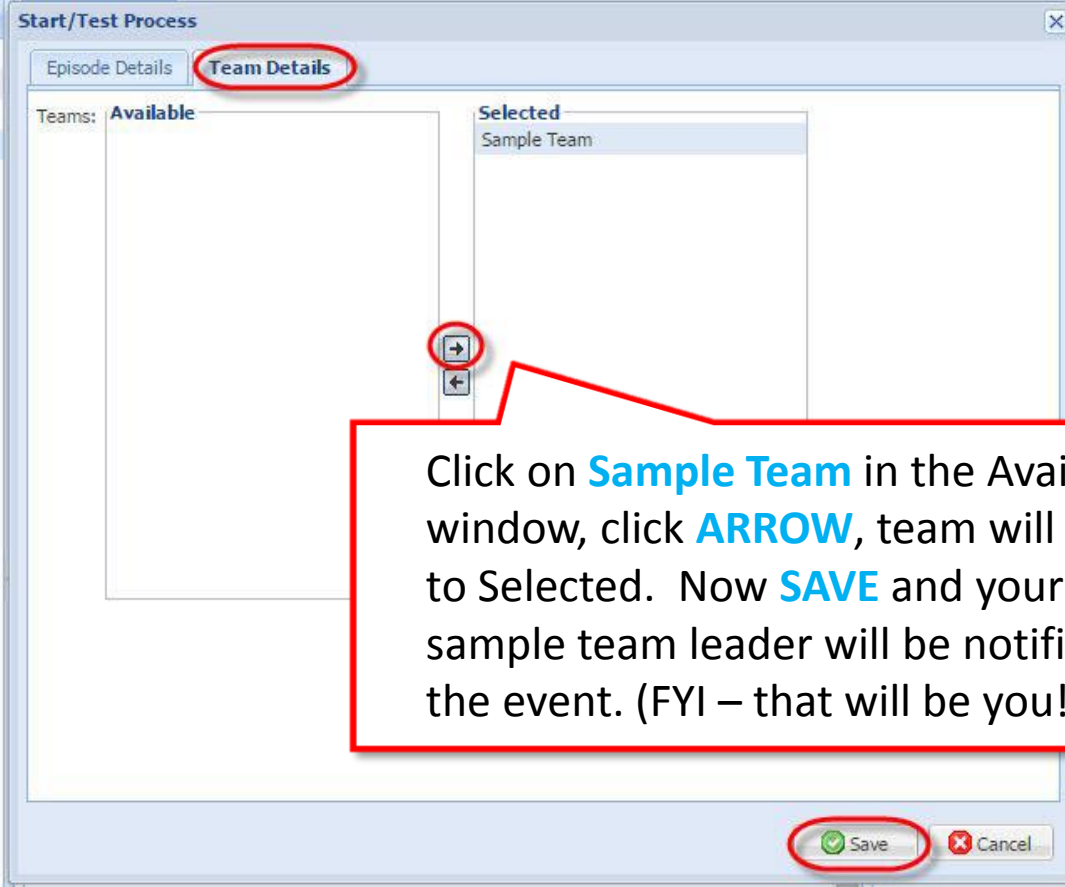Click **USE** menu, then **START/TEST PROCESS** (this function allows you to announce an event to a selected user and allow that user to pick a specific process)

Fill in the form: Title (what happened), Description (details you want to share) Site (drop down), Event type (drop down), then click **TEAM DETAIL** and select your 'sample team'

Click to learn more:
Start/Test a Process
Start Additional Processes

Start/Test Process ☒

Episode Details | **Team Details**

Teams: **Available** | **Selected**
Sample Team

→
←

Click on **Sample Team** in the Available window, click **ARROW**, team will move to Selected. Now **SAVE** and your sample team leader will be notified of the event. (FYI – that will be you!)

✔ Save | ✘ Cancel

Work Console

Assigned Work Items

Id ▲ Title

⊟ Episode Tasks (1)

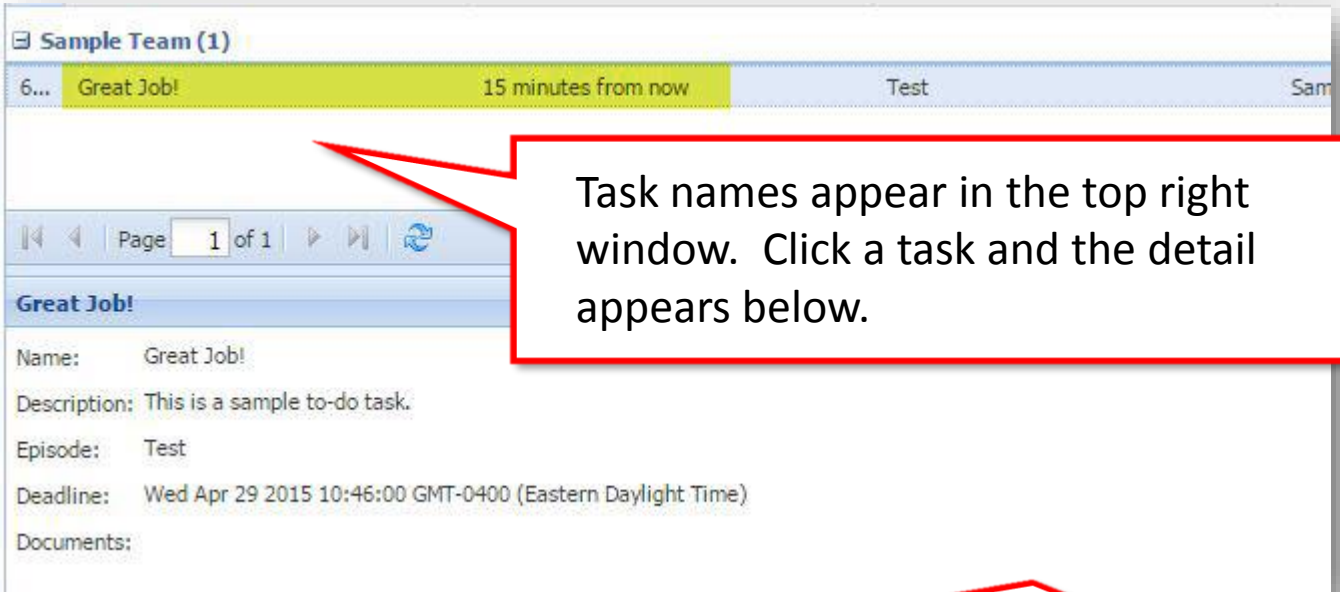6... Invitation to Join Episode

Click the **Work Console** tab at the top of your left window. You are the team leader so the invite awaits you! Click on **Invitation**. At bottom of your screen clic ✔ Join Episode

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Select Process

ID | Name
| Sample Process
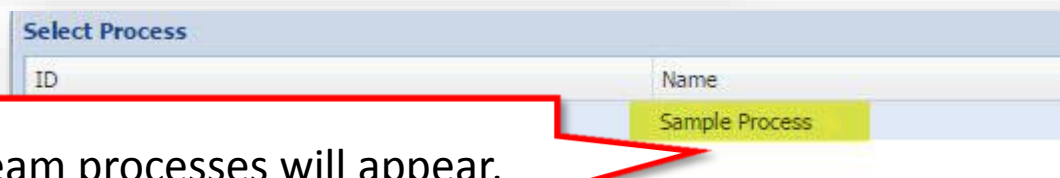
All of your team processes will appear, Click on **Sample Process** to select and click **SUBMIT.**

Step 4: Now complete the tasks!

Sample Team (1)				
6... Great Job!	15 minutes from now	Test	Sam

Task names appear in the top right window. Click a task and the detail appears below.

⊲ ◀ Page 1 of 1 ▶ ▶⊳ 🔄

Great Job!

Name: Great Job!

Description: This is a sample to-do task.

Episode: Test

Deadline: Wed Apr 29 2015 10:46:00 GMT-0400 (Eastern Daylight Time)

Documents:

Here are your options:

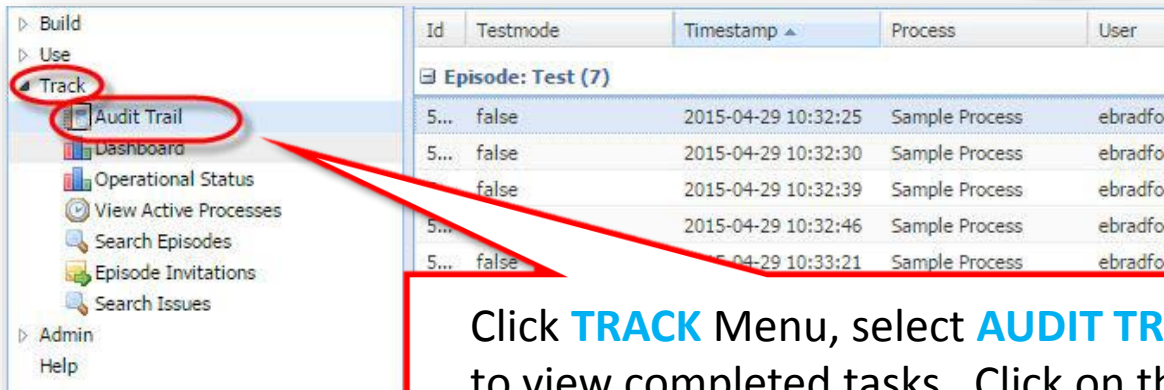[Mark as Completed] [Accept Task] [Update Notes]

Click Update notes – add a note before completing a task!

Accept Task – Click it - task will appear in the audit trail as accepted.

Mark as Completed – the next task will be released when you do!

To learn more about task completion, view here!

Step 5: Track Your Process

▷ Build
▷ Use
▲ Track
    Audit Trail
    Dashboard
    Operational Status
    View Active Processes
    Search Episodes
    Episode Invitations
    Search Issues
▷ Admin
  Help

Id	Testmode	Timestamp ▲	Process	User
Episode: Test (7)				
5...	false	2015-04-29 10:32:25	Sample Process	ebradfo
5...	false	2015-04-29 10:32:30	Sample Process	ebradfo
	false	2015-04-29 10:32:39	Sample Process	ebradfo
5...		2015-04-29 10:32:46	Sample Process	ebradfo
5...	false	5-04-29 10:33:21	Sample Process	ebradfo

Click **TRACK** Menu, select **AUDIT TRAIL** to view completed tasks. Click on the Event: Title (you named).