# Using Business Processes for Document Approval

In this blog post the main idea of the Business Processes module is explained. Here you can also find a brief tutorial on creating a simple sequential business process for document approval that can be used in the Document Library in Bitrix24.

What are Business Processes?

The Business Processes (BP) module allows the planning, execution and monitoring of business processes on objects (usually documents and CRM objects, but not only). Incorporated into this tool are simple action blocks from which larger processes are built, as well as support for viewing the status at any time and a log of all actions taken over the course of the business process.
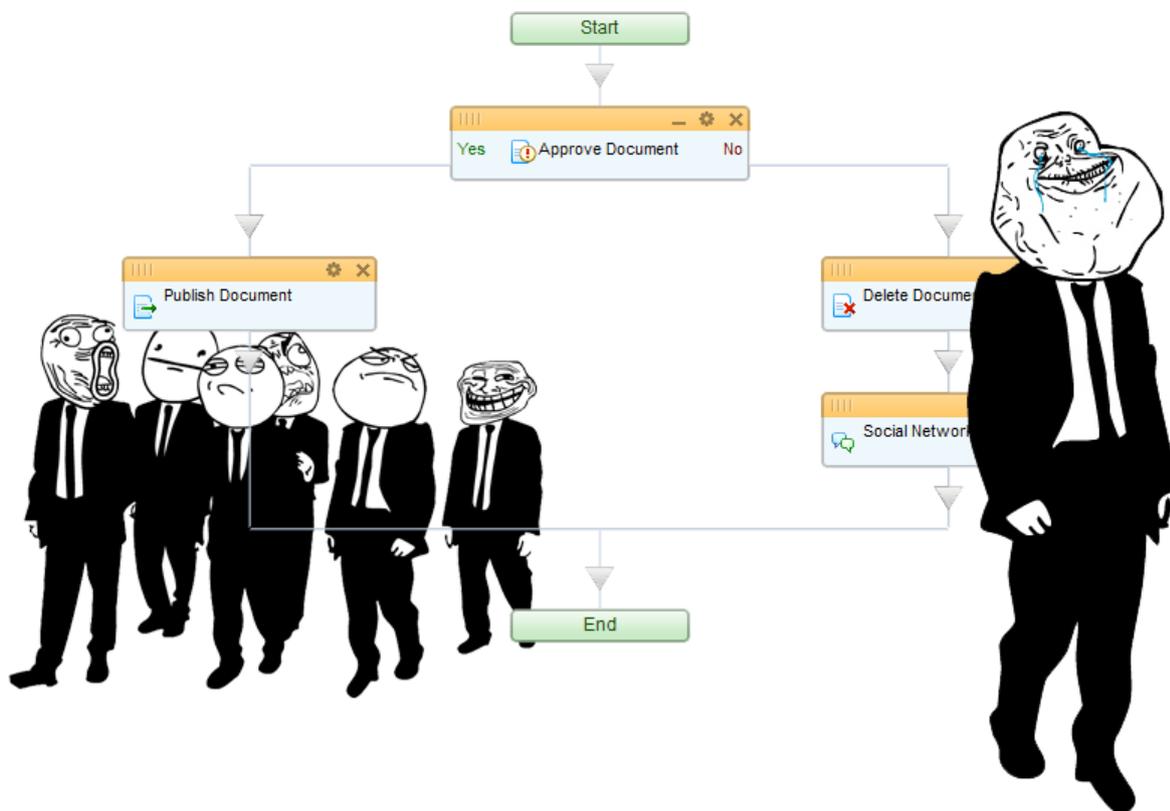
How does your company benefit from using Business Processes?

Let's say you are ready to upload a new version of a sample agreement to the Document Library on your intranet. This new sample agreement will be used by your employees for entering into contracts with new clients, suppliers, etc. Because agreements and contracts are very sensitive documents, you need to make sure that everything is flawless with the wording and structure of the new version of the sample agreement.

You want this new version to be approved by the Legal Department and/or the Executives before it is published on your intranet. Same counts for the documents that had already been uploaded but need to be approved on every modification.

It's fine when you have only 5 documents in your Document Library, but when it comes to 500 or 5000+ documents that need to be revised from time to time... That could be a real challenge for the whole company, and this is exactly the kind of situation where Business Processes can provide value by systematizing your workflow automation.

You can create a new workflow (we call it a Business Process template) for document approval that will be used every time a new document is uploaded or an existing document is modified. There will be one, two or more persons involved in your BP: a person who submits the new document, a person who revises or approves the document, and maybe someone else in the middle.

With the BP enabled, not a single document that's uploaded or changed in this Document Library will be unnoticed. Business Processes will make sure that your documents go through certain stages of approval before being published on the intranet.

**Creating a simple Business Process for document approval**

Let's see how to create a new BP from scratch. We'll build an unsophisticated structure for the BP template that will include just a few blocks. Below is a set of screenshots that illustrate how to build a simple BP template step-by-step.

(1) First, we need to navigate to the Document Library where we want our documents (or other data) to be pre-moderated using the Business Processes module. If BPs are not yet activated in this particular Document Library, we'll need to enable them in the Document Library settings.
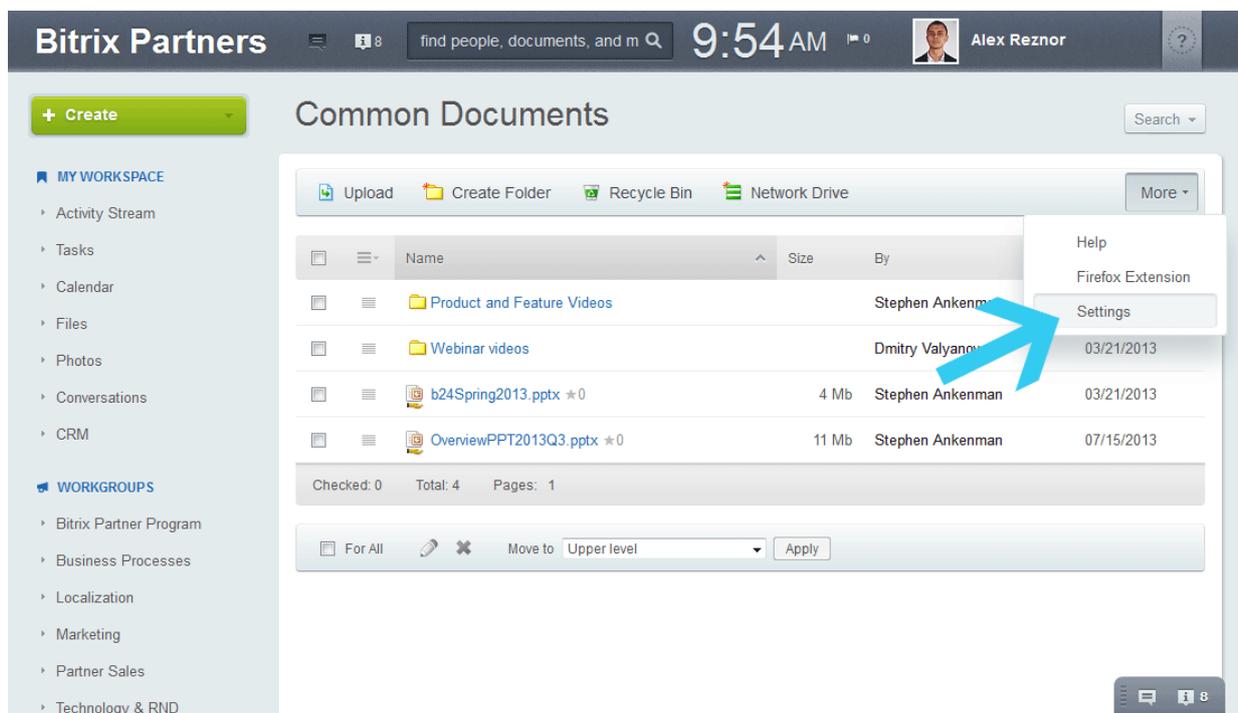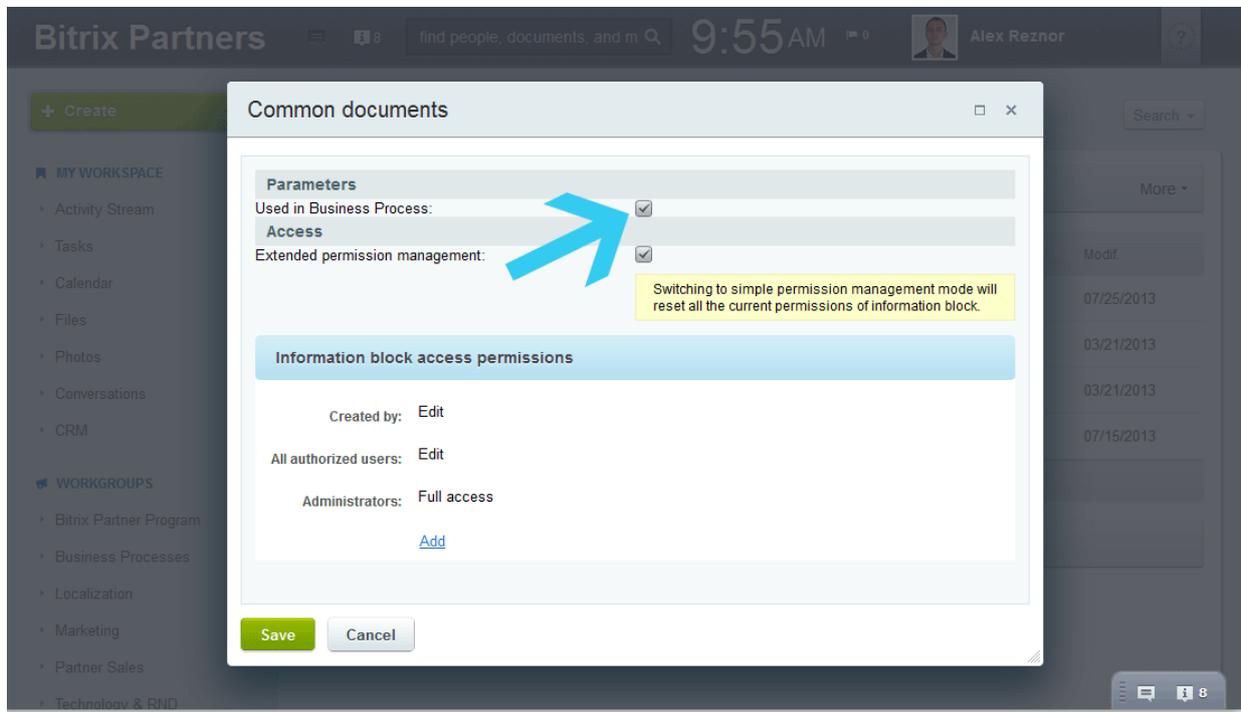
(2) Because we are creating a new BP template from scratch, we should select a BP type for our future BP structure. There are two types of Business Processes: sequential processes and status-driven processes (more information on BP types can be found here: http://www.bitrixsoft.com/products/intranet/features/business_process.php). What we need for our new Document Approval BP template is a sequential process. A sequential business process is generally used for processes having a limited and predefined lifecycle. A typical example of this is the creation and approval of a text document (i.e. *uploaded --> submitted for approval --> approved --> published*).
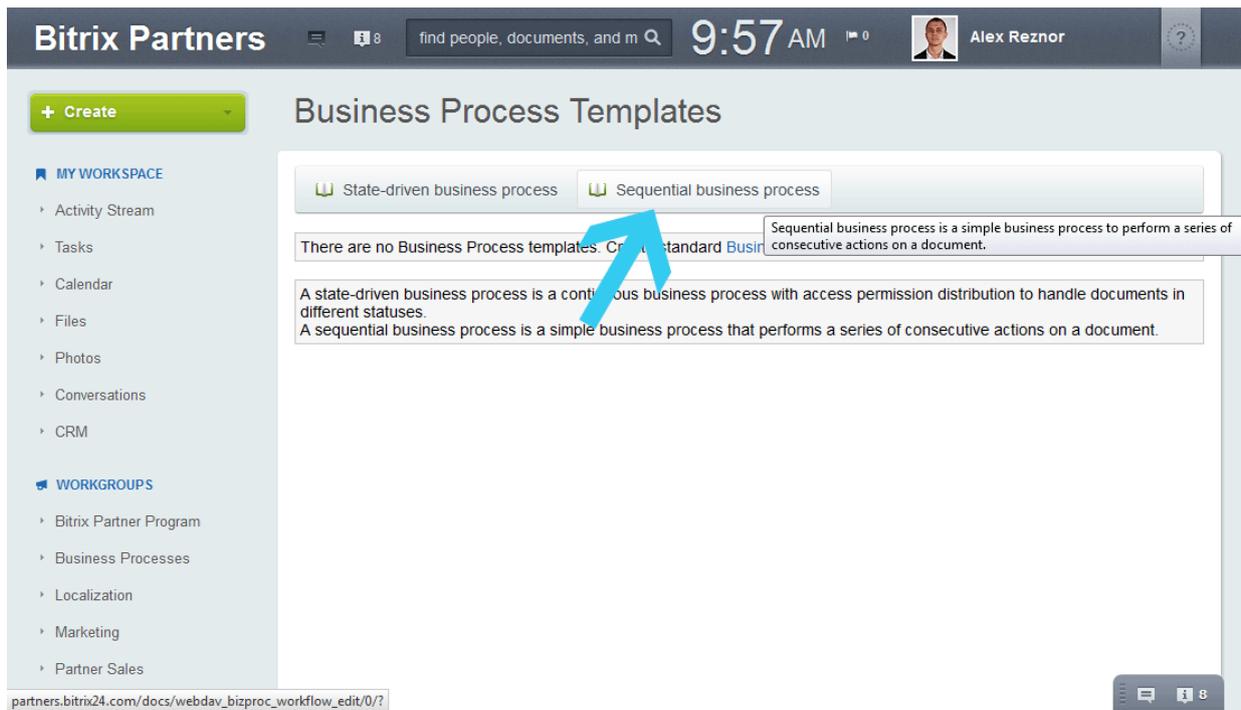
(3) We should make sure to select the appropriate Autorun options for our BP. *When added* – BP will be carried out every time a document is uploaded into this Document Library. *When changed* – BP will be run every time an existing document modified. In this example, we need both.
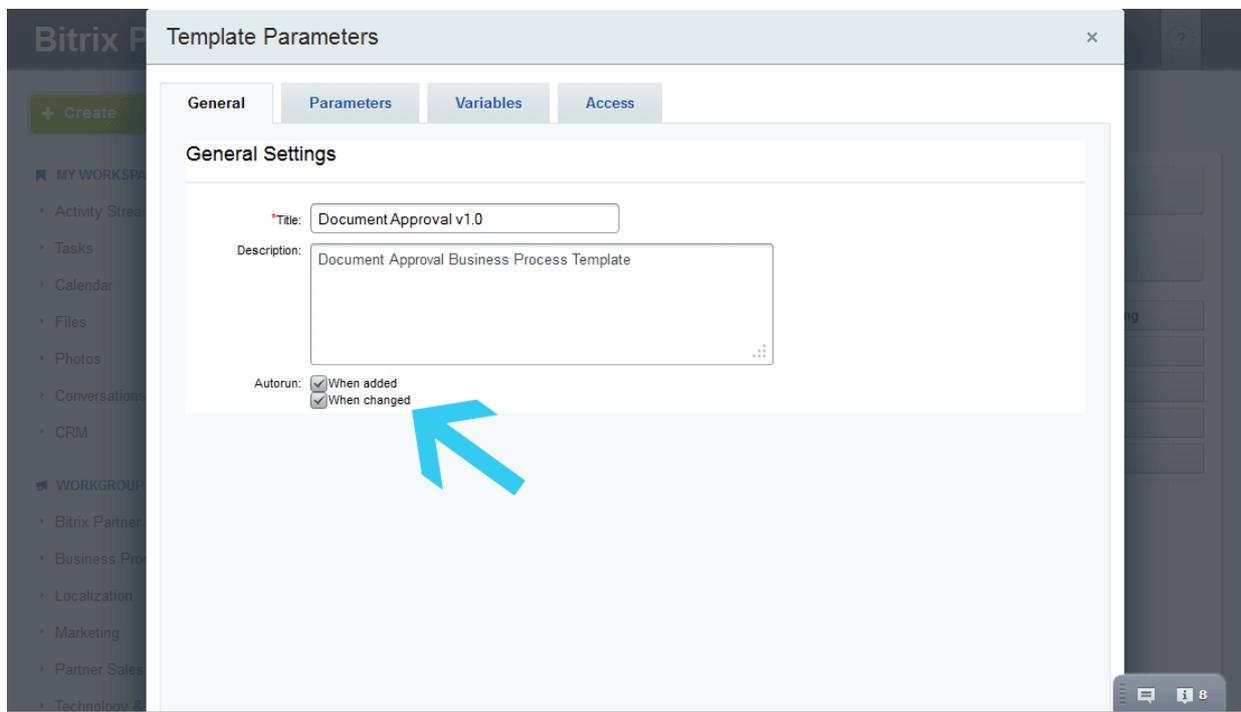
(4) When we are done with the BP template description, a new window is opened. Here we can use the Business Process Editor. BP Editor is a simple flowchart creator into which (pre-made) function blocks can be dragged and dropped. Each function block has settings which are configured according to the needs of the process. We need just a few of them. Let's start with the Approve Document function block.
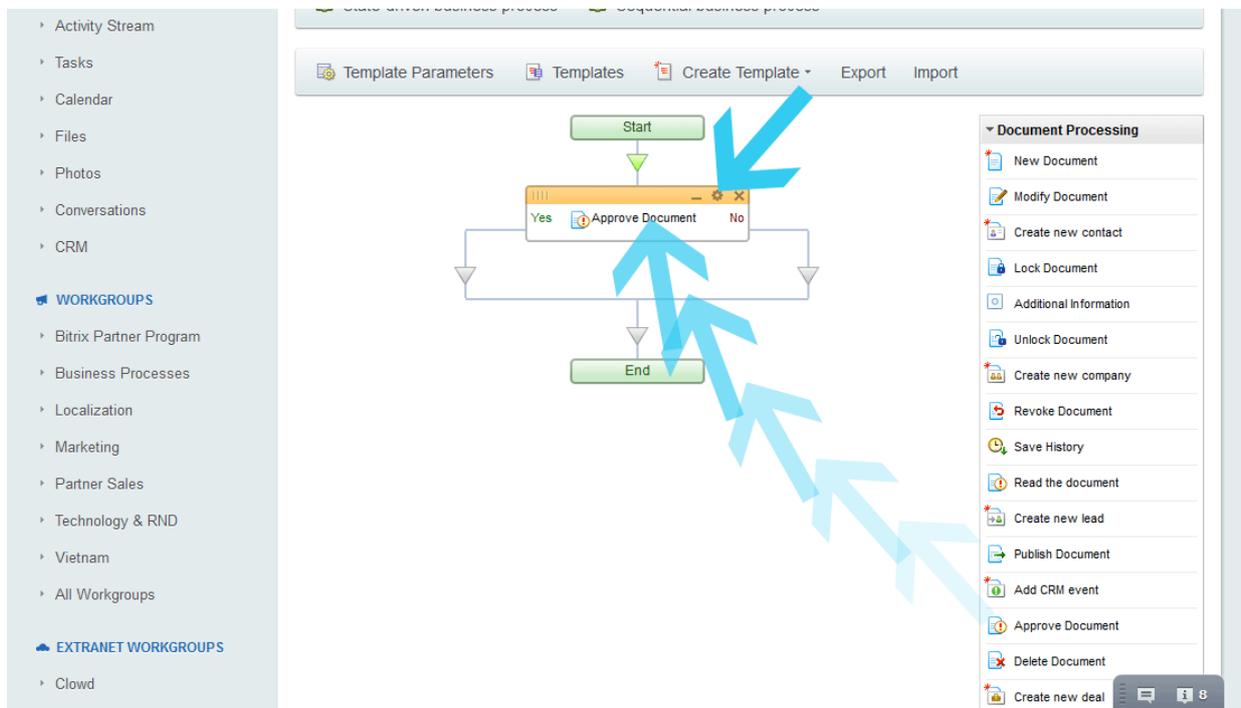
(5) When dropped into the structure, we can click the small gear placed in the top-right corner of the function block, and access the function block settings. Here we select persons who should approve the submitted document, choose whether or not all of them should approve the document or one vote/decision will be enough, and add text for the message that will appear in the BP log, etc. To select data that is relevant to the document (who created, when created, link to the file, etc.) we can use buttons with three dots "..." found next to some data fields.
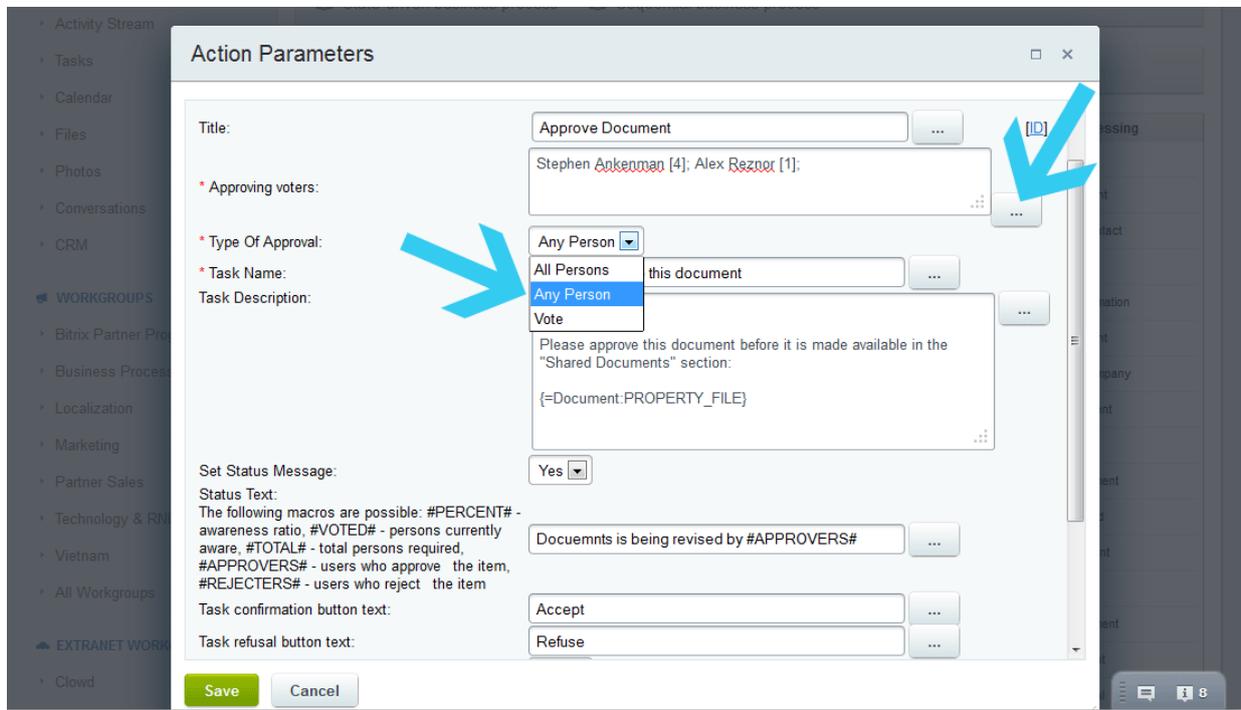
(6) Ok, we're done with the Approve Document function block, now we see that there are two paths our document can go through depending on the decision made by the persons approving it. If approved, we want our document to be published in the Document Library, if rejected, we don't want this document to be available for others. For these actions, let's drag and drop two more function blocks into our BP structure: *Publish Document* and *Delete Document*. The names of the blocks correspond to the actions they carry out.
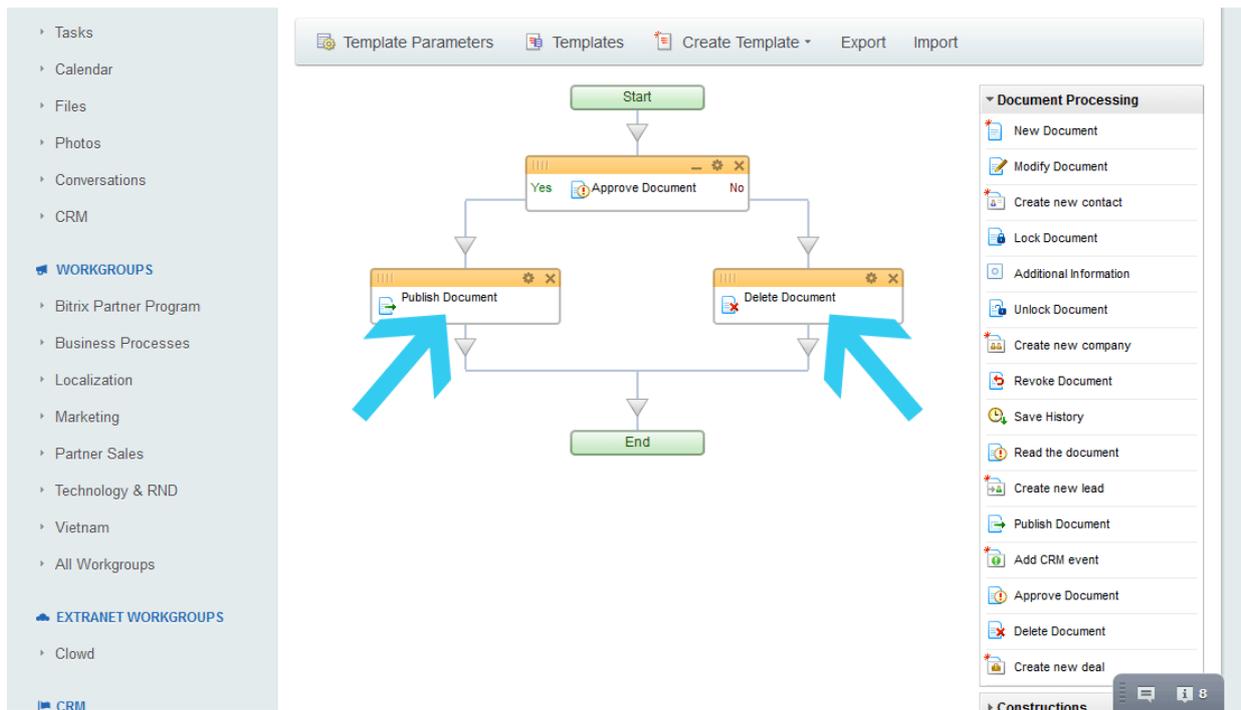
(7) We're pretty much done with the BP structure for now. We can click the Save button and return to the Document Library where we enabled our BP module. Let's upload a new document called DRAFT.docx. As you see, the circling arrows and an exclamation mark appeared next to the document name, indicating that the BP is in process. The responsible person (the one who needs to approve this document) will also receive a Workflow notification (see the left-side menu indicator that shows the number of workflow and BP tasks).

(8) We can now navigate to My Workspace > Workflow > to see the tasks pending for our action. Here we can find a new document approval request. Let's double-click this item for further details.


(9) We can either Accept or Refuse the new document. Let's click Accept and see what happens next.
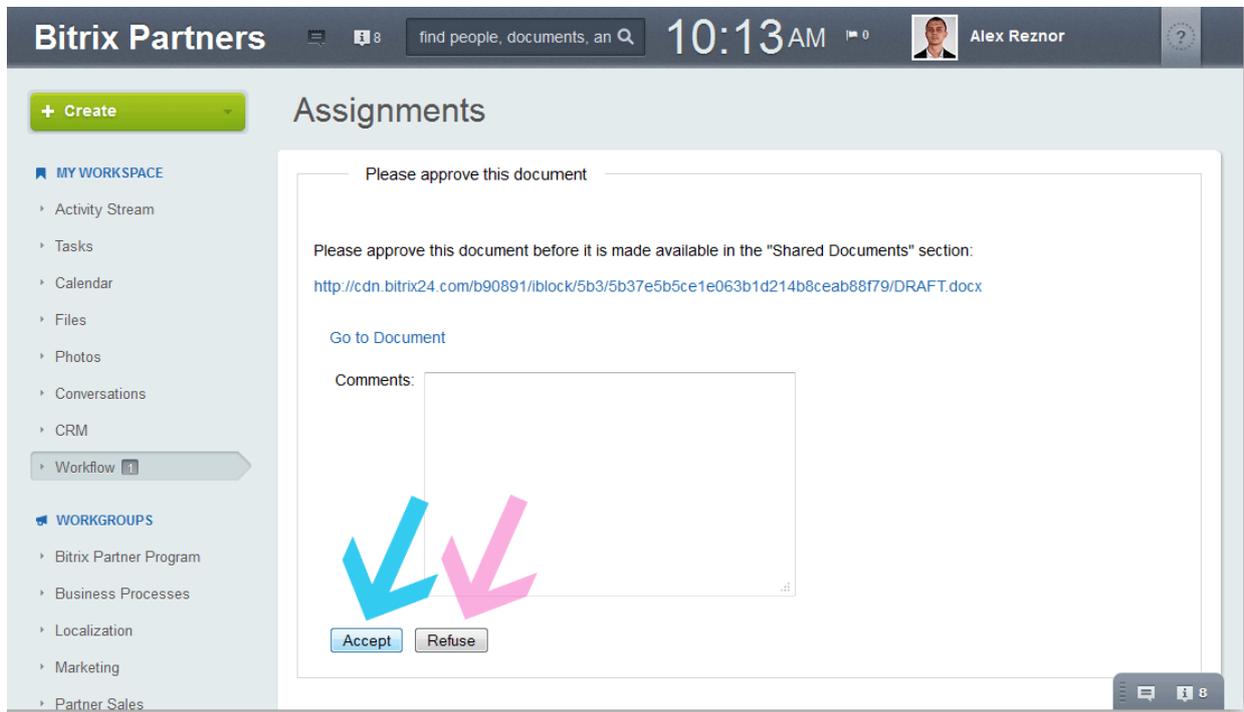
(10) Each document (or file) that has been put through one or more business processes, has its own BP Log. Here you can see all the stages this document has been through.
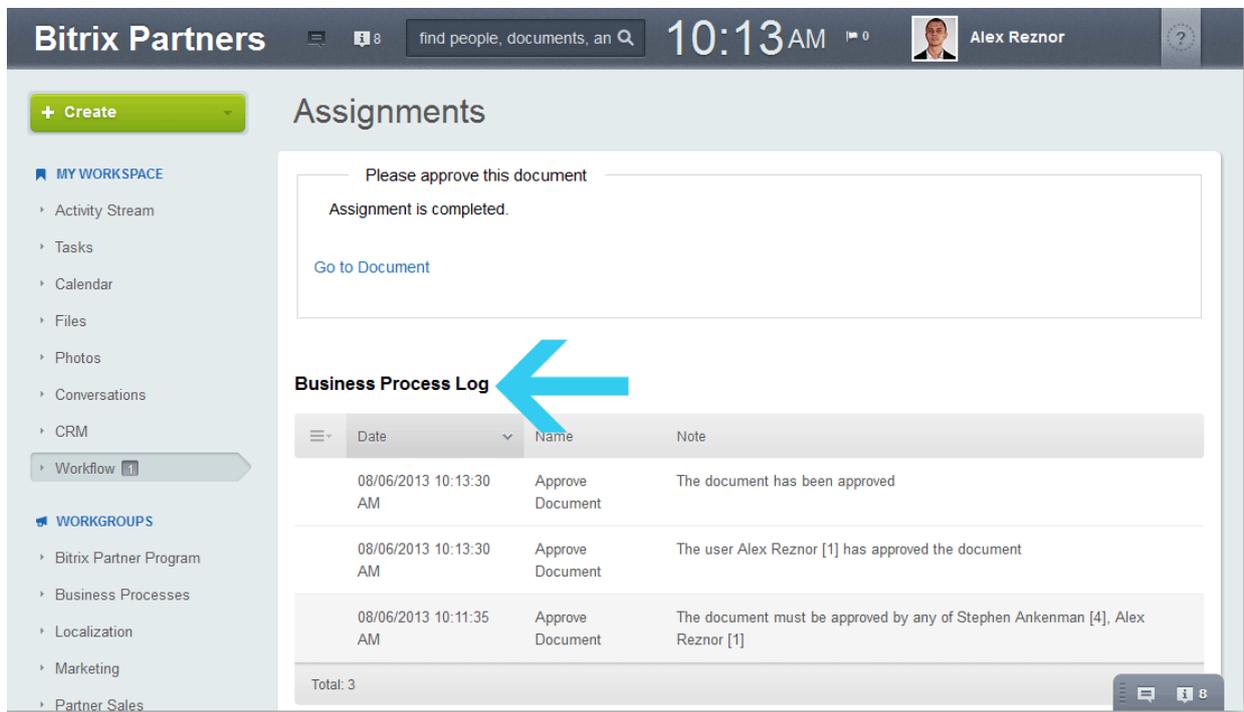

(11) All right, everything is fine with our document: it's been approved and now published in the Document Library. If you navigate your mouse cursor to the file, you'll see a pop-up with the status - "Completed".
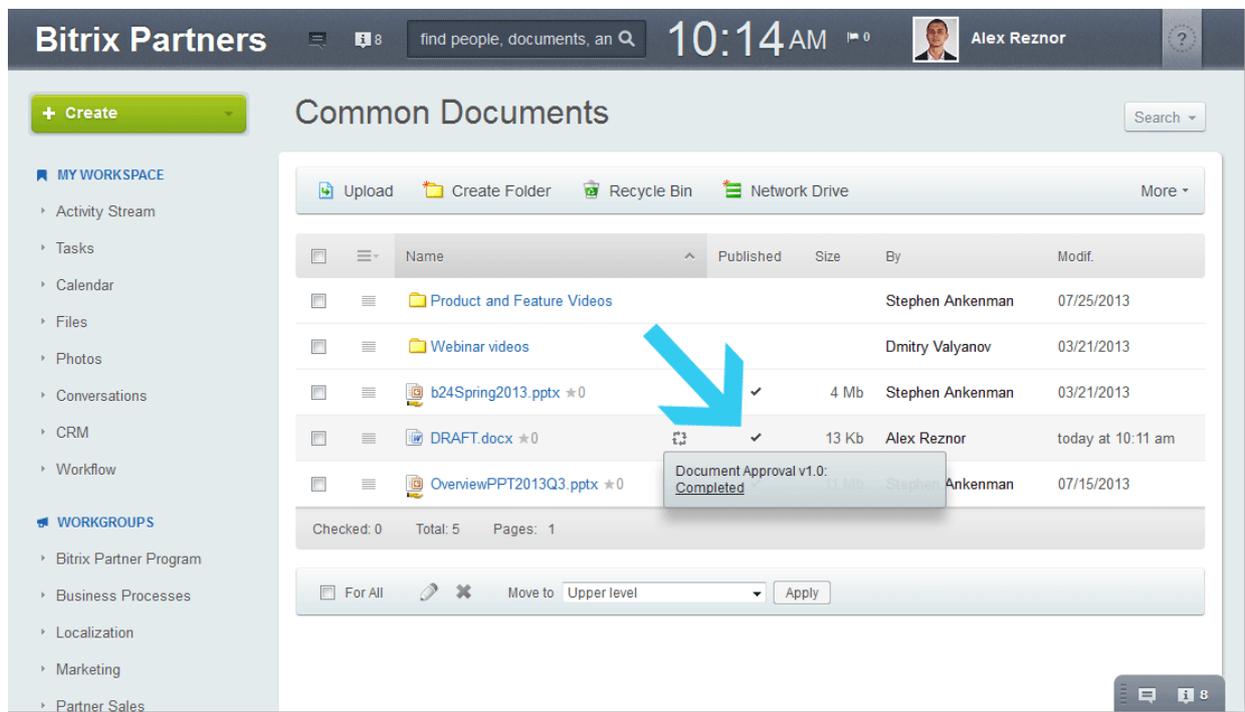
(12) Let's upgrade our BP structure a little bit. In case a document is not approved, we want the person who's submitted the document to receive a corresponding message via the Web Messenger. We need to go back to Document Library > More > Business Process > [BP name]. Now we should drag-and-drop the Social Network Message function block somewhere in the path that's used for rejected documents.
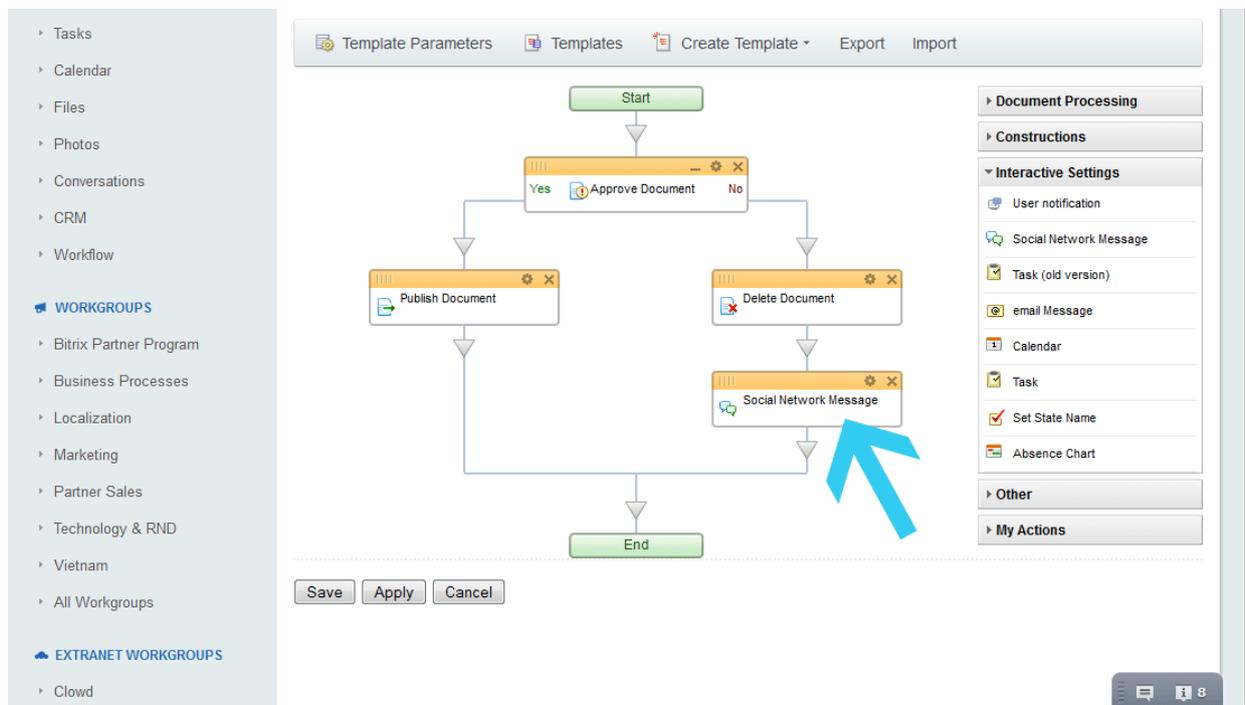
(13) To change the settings and add a notification text, we need to click the gear icon. This brings us to the function block settings where we can select sender(s) and recipient(s), as well as whatever text is desired. For the recipient field, we are going to use the three dots button "…" to select the user who has submitted the document. The submitter can be found in the "Document Property" category and will be represented by a special code line - {=Document:CREATED_BY}. Now we can save the function block properties.
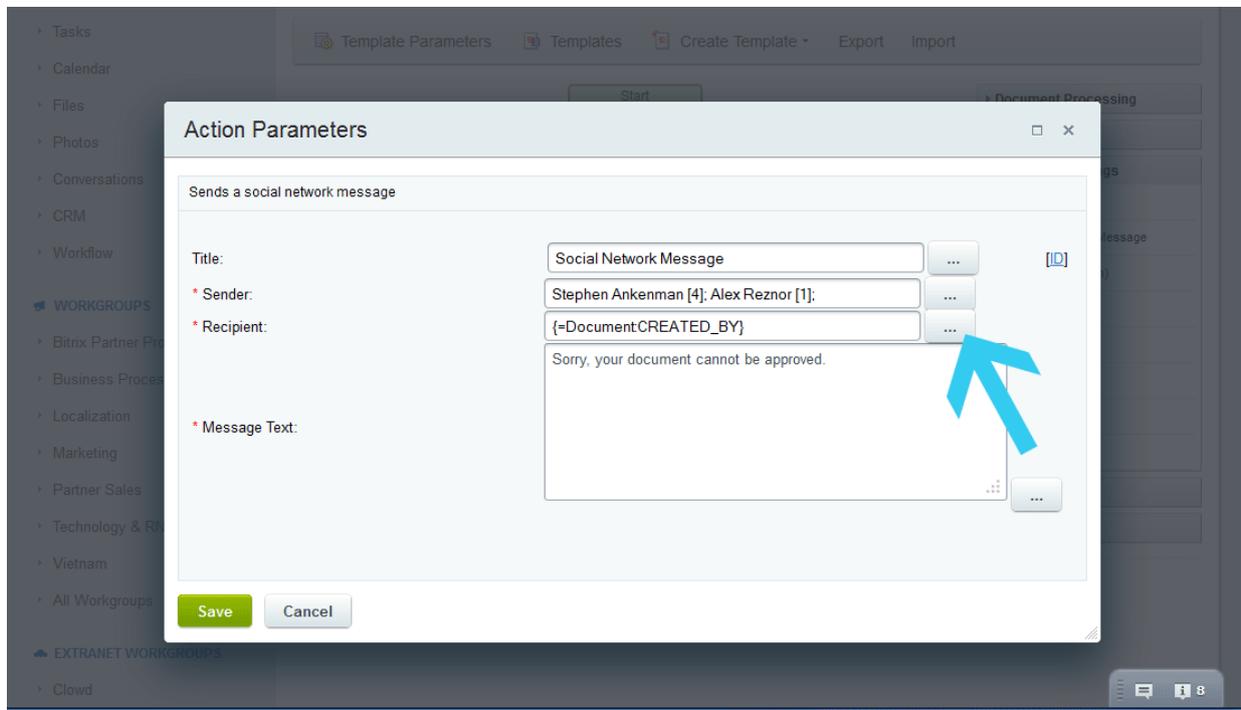
(14) Now let's upload a new document and reject it. We see that the submitter received a message through the Web Messenger saying that the document could not be approved. Also, we see that this document did not appear in the Document Library (it was deleted).
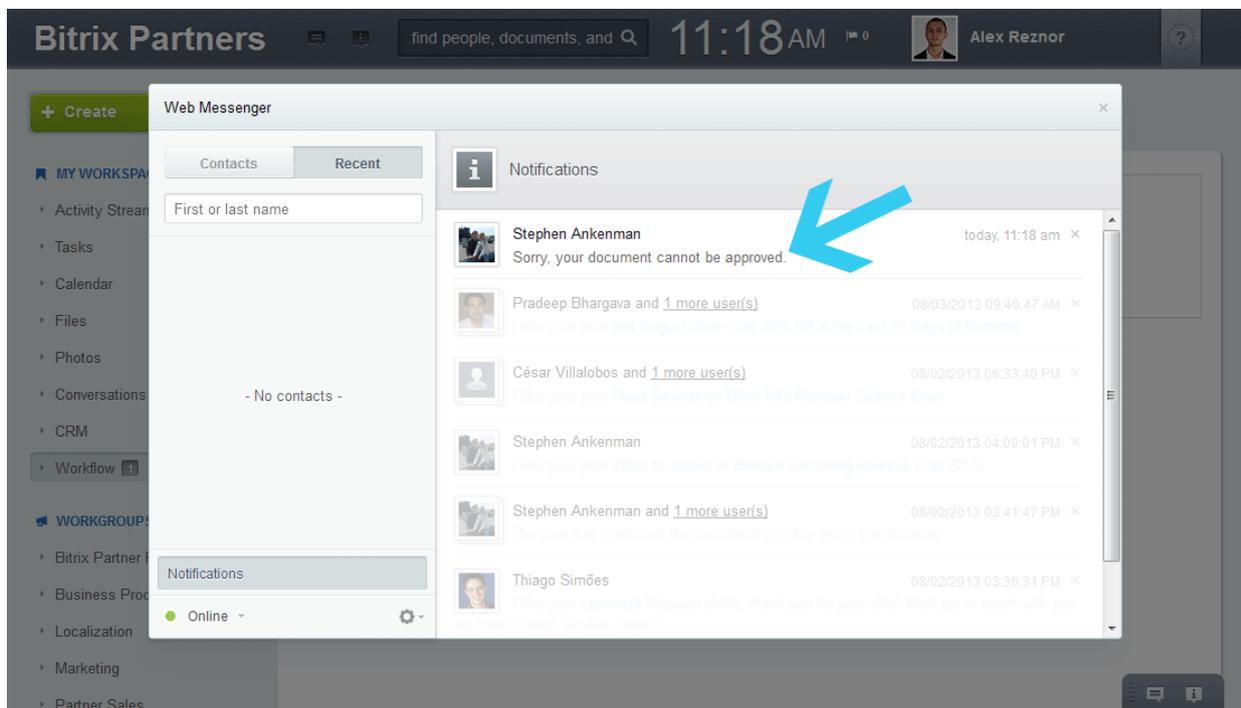
A few more things to mention about Business Processes

This document approval BP template is just a small example of how convenient Business Processes can be for your company and your co-workers. You can use BPs for Document Libraries, Records Management (Lists), CRM items, and even create stand-alone Business Process! I hope was information was useful for you, and now you can create your own BP templates for Document Libraries. Feel free to download and import the original BP structure that I prepared for this tutorial.

By the way, if your colleagues actively use the Bitrix24 CRM, there are a lot of things that can be automated using the BP module inside your CRM. For example, Leads and Deals can be processed with substantial automation using business processes. A business process can run or trigger any and all possible actions with CRM elements: sending email, assigning responsibility, setting tasks, etc. Business processes can change the status of elements, fill in fields, and create new objects such as deals.

Check out our new video on Business Processes in Bitrix24 CRM. Business processes in the CRM and document library are the best way to make Bitrix24 fit the unique operations of your company. This video shows how to set up a simple, automatic action that sends a notification to a user located based on the properties of the CRM object itself. http://www.youtube.com/watch?v=d03P2BtW7Zw

For more information on Business Processes, please refer to this page:
http://www.bitrixsoft.com/products/intranet/features/business_process.php