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How to make a BPM rule

Find the BPM rules relevant to the document you are making the rule for. This is usually a direct activation on the document. If you can't find it you can use the search tool (Ctrl+Alt+E) and search for BPM to see all the various ones.

If you don't have access it is because you don't have the right privileges, therefore you need to get someone within your company who does have access to make changes.

To create a BPM rule:

Right click on the status if you want to make a rule for whenever a record goes to the selected status.

Or

Right click on an arrow if you want to make a rule for when a record goes from a specific status to another. Use the arrow which links the selected statuses.

Select Rules

Define rules for Canceled

When

the document reaches this status

the document remains in this status longer than

the date in the column ago

to Active?

Definitions

Subject:

Text:

Attach document using print format As PDF?

If

of is

and of is

and of is

You then get the option to define whether the rule is for when the document goes into the status, remains in the status for a chosen amount of time, or a date in one of the columns happened/happened a chosen amount of time ago.

FYI if you choose the option to have the rule active when the document goes into the status, the email will send right away from the inbox of the person who changed the status. If you set it so that it emails after the document has remained in the status for 1 minute or more the email will be sent from the tabula user (The system manager).

The next part is the email settings. You can set it to email a user or email address (if you want to specifically put someone in) or you can get it to email a form column, meaning that you can set the rule to email for example the assigned to person on the document.

Next you can put the subject and body of the email. You can insert fields into the email if you want to include information from the document.

You can also attach a document to the email and you can add some extra conditions to the rule if necessary. You must save the BPM flow chart for it to be in effect.