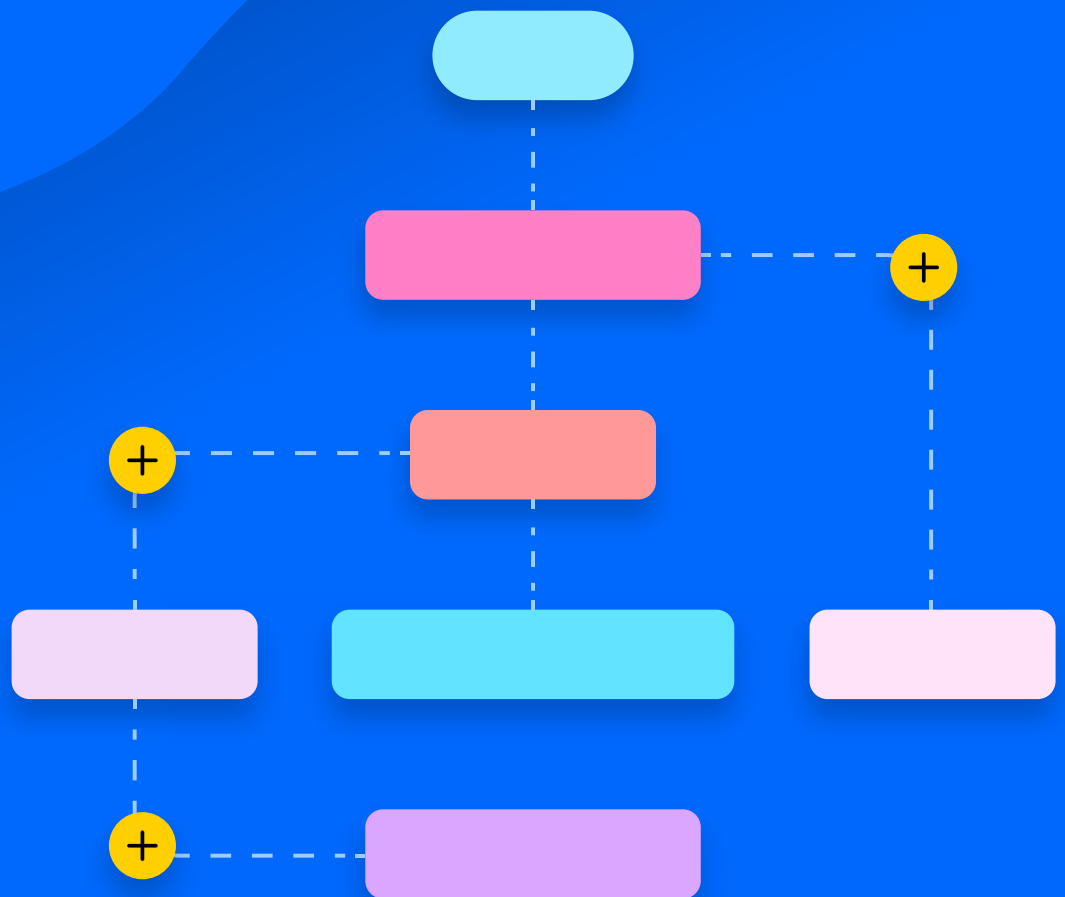


Process automation using

Blueprints

in Zoho Projects





Overview

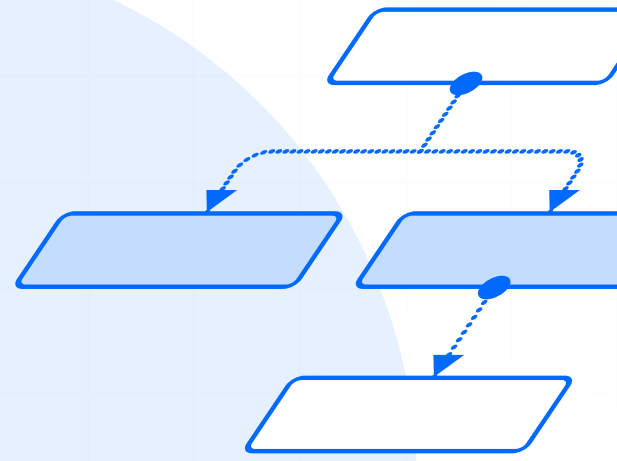
As organizations expand, the processes they follow become more elaborate. For a startup with a few employees, reaching the month's revenue objectives is the ultimate survival goal. Whether tasks are done is more important than how they're done. However, once its operations are more stable, standardizing processes and ensuring employee compliance becomes vital.

Depending on the stages, possible consequences, and the number of people involved, processes can be either straightforward or complex. Outlining the approach in black and white will help you understand the lifecycle of each task and analyze the scope for improvement.

Digitizing these processes, automating their flow, and managing them within your current project management software gives you more control.

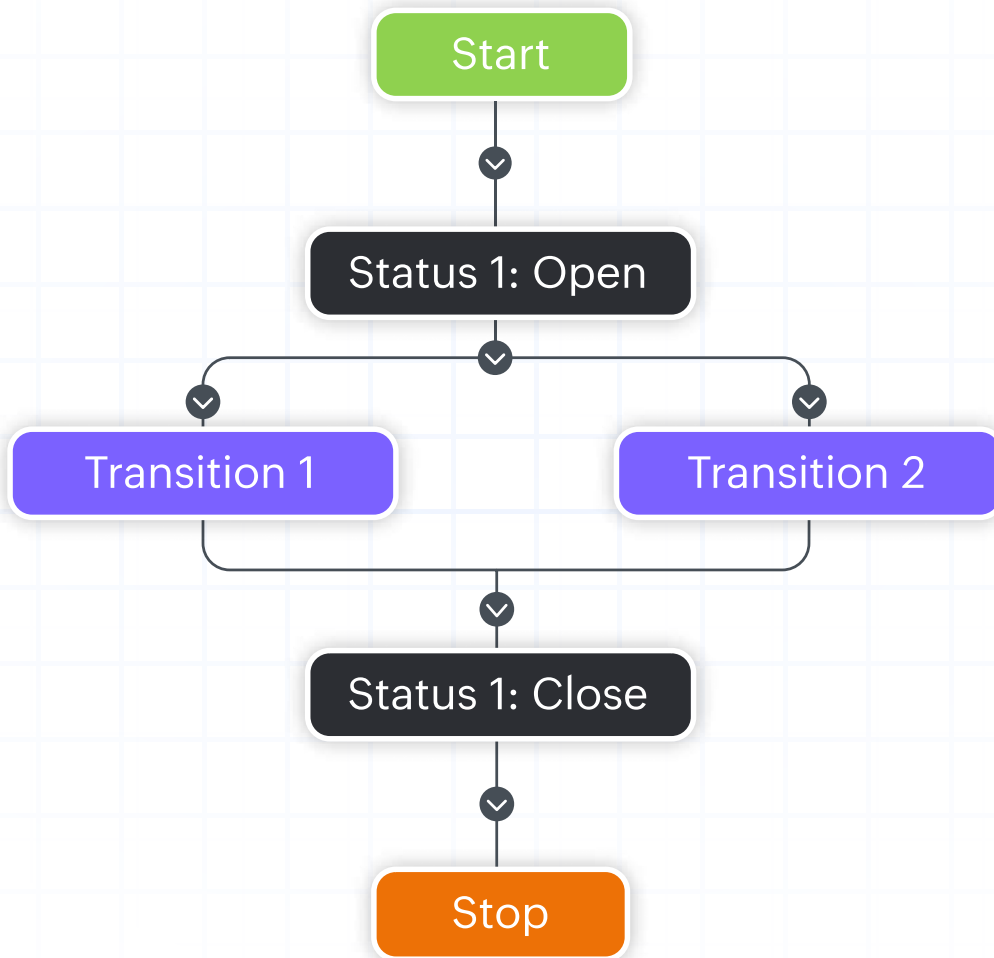
The Blueprints feature in Zoho Projects was developed with this exact goal in mind—to equip our users with process automation capabilities right within their project management platform.

What are **blueprints** ?



Blueprints help you define, visualize, and automate the entire life cycle of a task in your project. Zoho Projects provides a simple drag-and-drop interface you can use to easily build and automate these flowcharts.

Blueprints consist of statuses, indicating the stages of the task, and transitions, indicating the actions to be performed for a task to move to the next stage.



The transitions can be configured with conditions that are triggered before, during, and after the task is executed. This ensures linked actions are executed automatically right when the user performs the transition. You can send automated emails, update field values, trigger custom functions, and use webhooks.

Before getting into the details, let us start with the basics.

How to plan a process

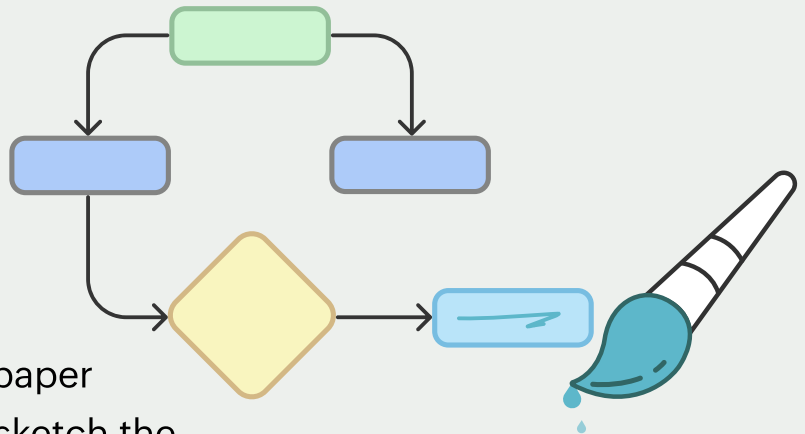
1 Brainstorm the flow



The first and most important step in planning your process is to gather the resources. Get on a meeting with your entire team and spot the redundant tasks that can be automated. Once this is done, lay out the specifics of the task, jot down all the steps involved, and include their consequent actions.

2 Design the flowchart

Be it the old-school pen and paper flowchart, or the digital one, sketch the entire process that you just planned as a flowchart. This step will help you visualize the flow and identify gaps.

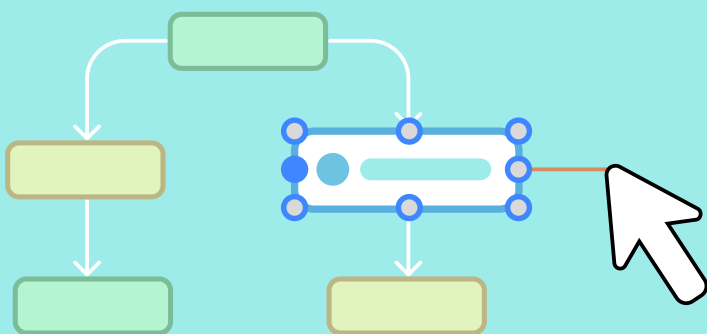
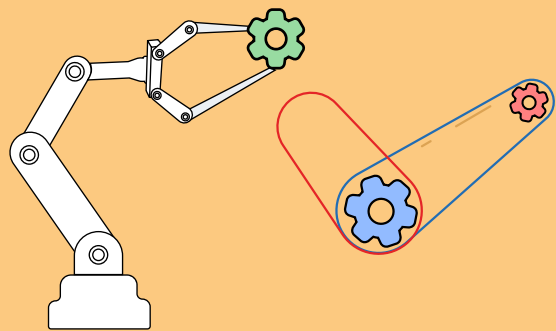




3

Automate actions

You can automate subsequent actions that take place before, during, or after a step in the process gets done. Identify and configure these actions.



4

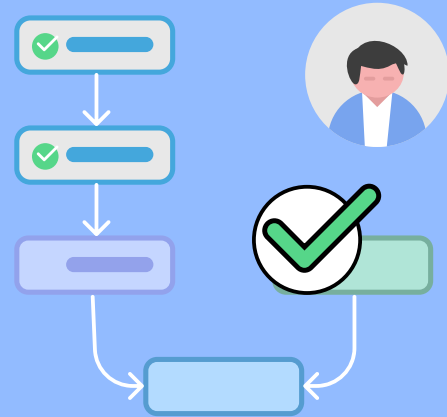
Refine as you progress

Revisit the flowchart you've designed and consider any parts that can be refined. It could be cutting out a redundant step, combining similar steps, or providing proper descriptions.



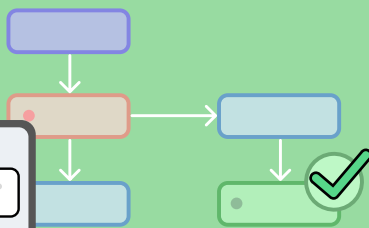
5 Validate with stakeholders

Discuss the flowchart with managers, stakeholders, or approvers. Suggestions for improvement can be included at this stage.



6 Test and implement

Before you implement the process for all employees, test it once to ensure it works as intended. If the test results are successful, you're all set to implement.



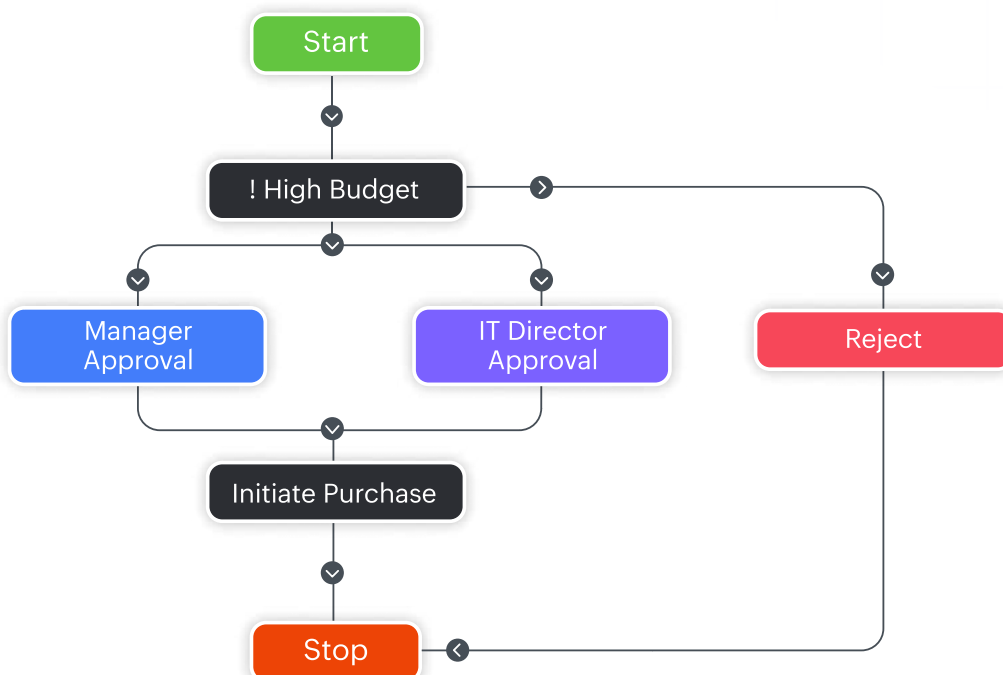
Let's build a blueprint!

We'll walk you through all the steps involved in creating a blueprint. First, let's consider a sample business scenario.

Zylker Inc, an IT company, procures new gadgets or provides upgrades to its employees. Every time an employee requires a gadget, they can create a task and assign it to their IT team, who will handle the purchase and hand-over of the gadget to the employee.

Lately, there has been an increasing trend of employees raising gadget requests for high-end devices, which exceeds the company's budget. To validate these orders, the IT team has to communicate with managers to get an approval. The IT director is also required to validate and approve the quotes.

Dealing with multiple approvals manually consumes more time and also seems redundant. To overcome this, Zylker Inc decides to streamline their gadget procurement process using Blueprints in Zoho Projects. This ensures they don't overshoot the budget or bypass any approval.



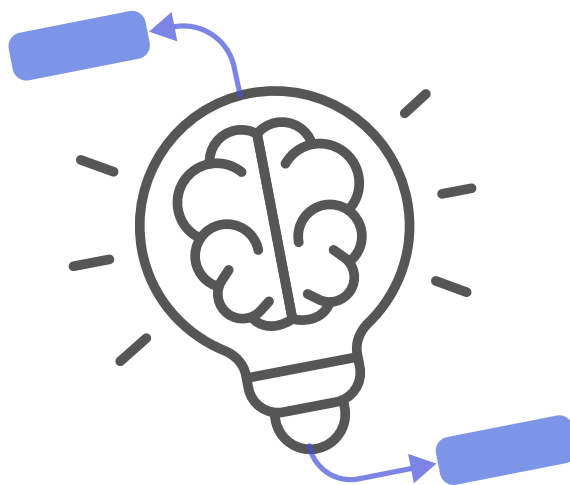
Now, let's walk through the **steps to build** the process for Zylker.

STEP

1

Brainstorm

The IT team converges to define different steps involved in the process. Since they experience the process first-hand, they list all their pain points and ways to overcome them.

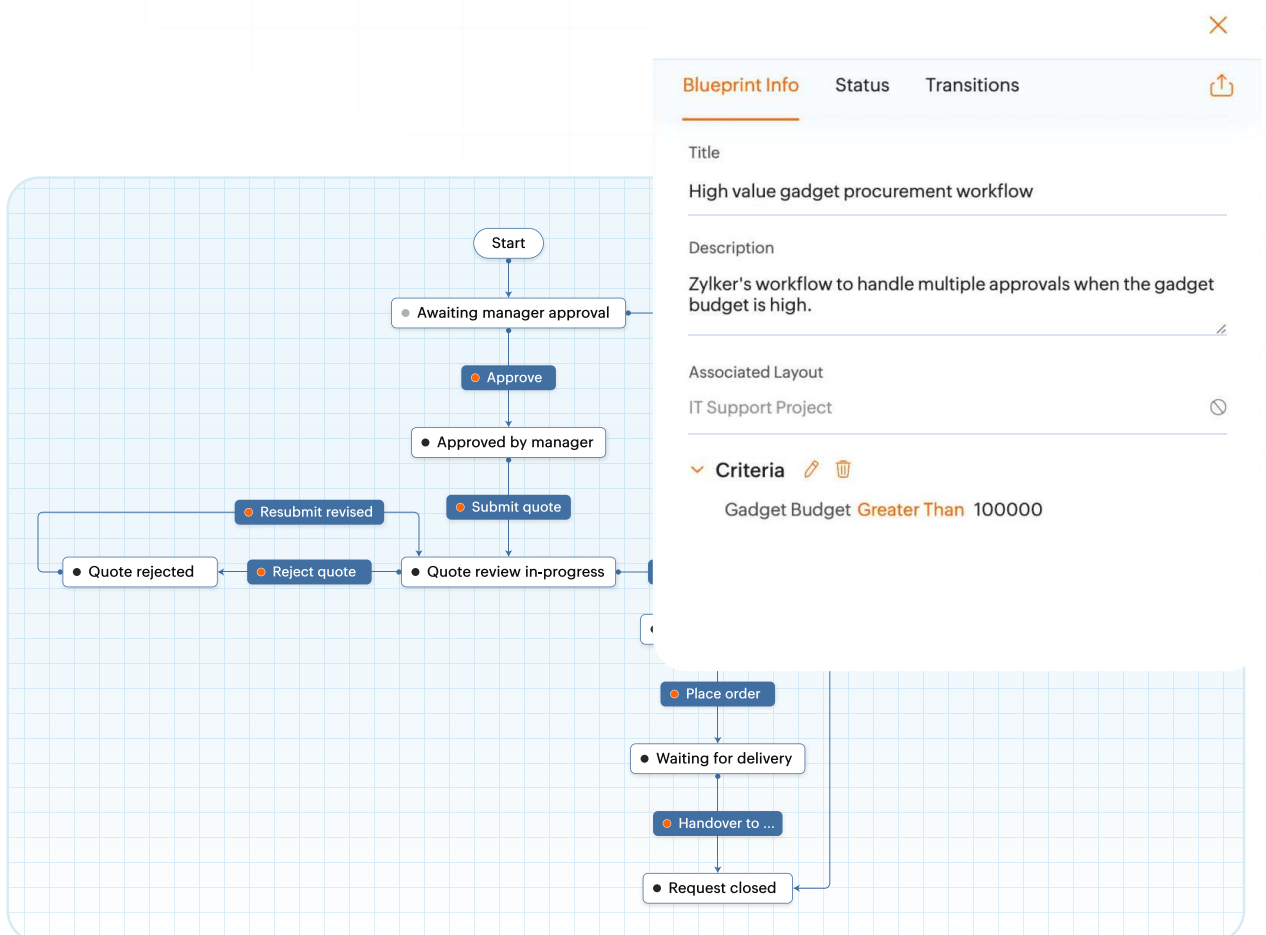


2

Design

The discussed steps are divided into statuses and transitions, and a rough flowchart is built using the blueprint editor in Zoho Projects.

Tip: Use verbs to name your transitions, as they signify an action.



To ensure this blueprint is triggered only for high-value requests, a criterion is set with the Gadget Budget field.

3

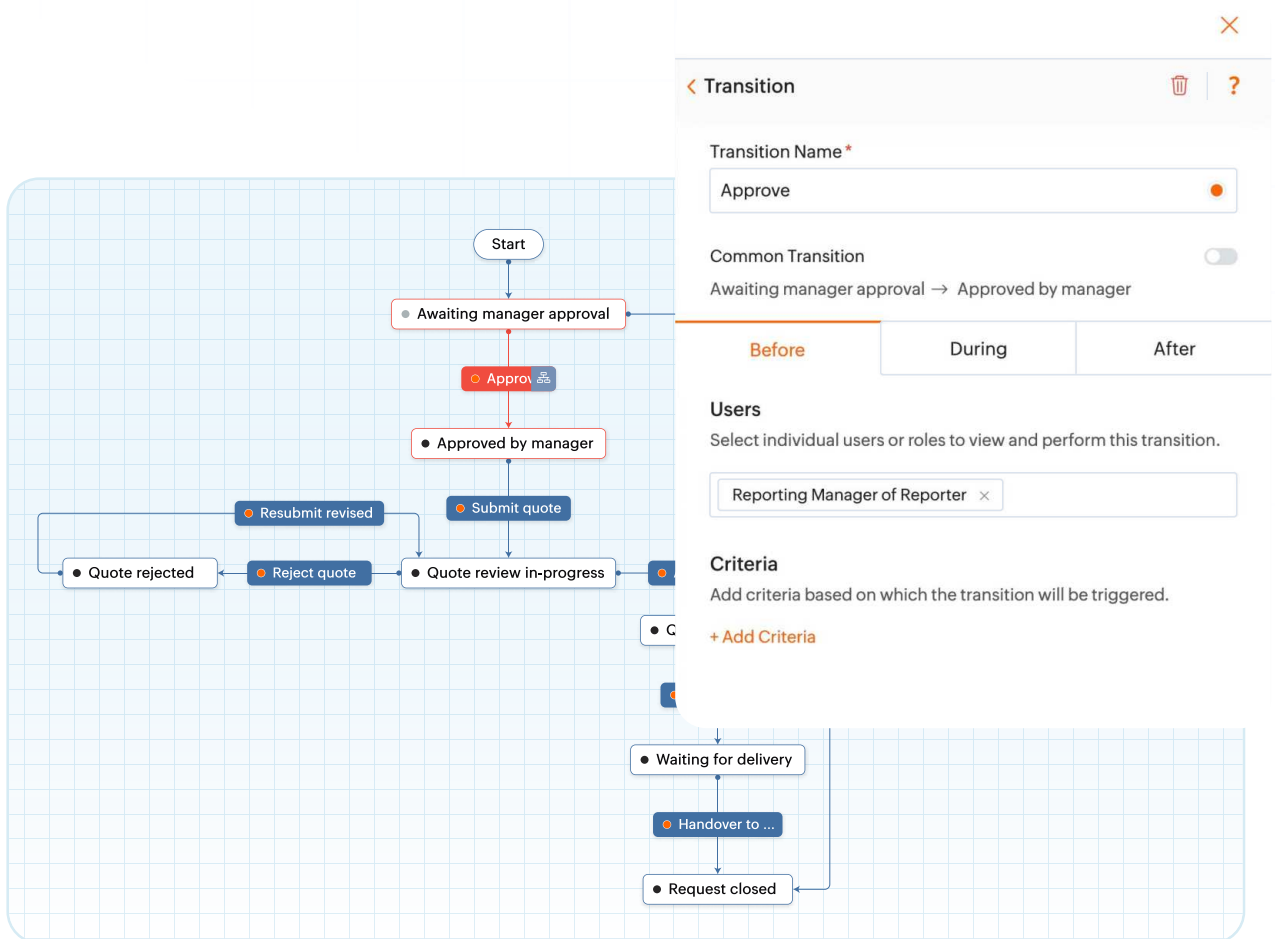
Automate actions

Analyze each transition and identify the action to be automated in it.

Here's the list of transitions configured with actions in the procurement process:

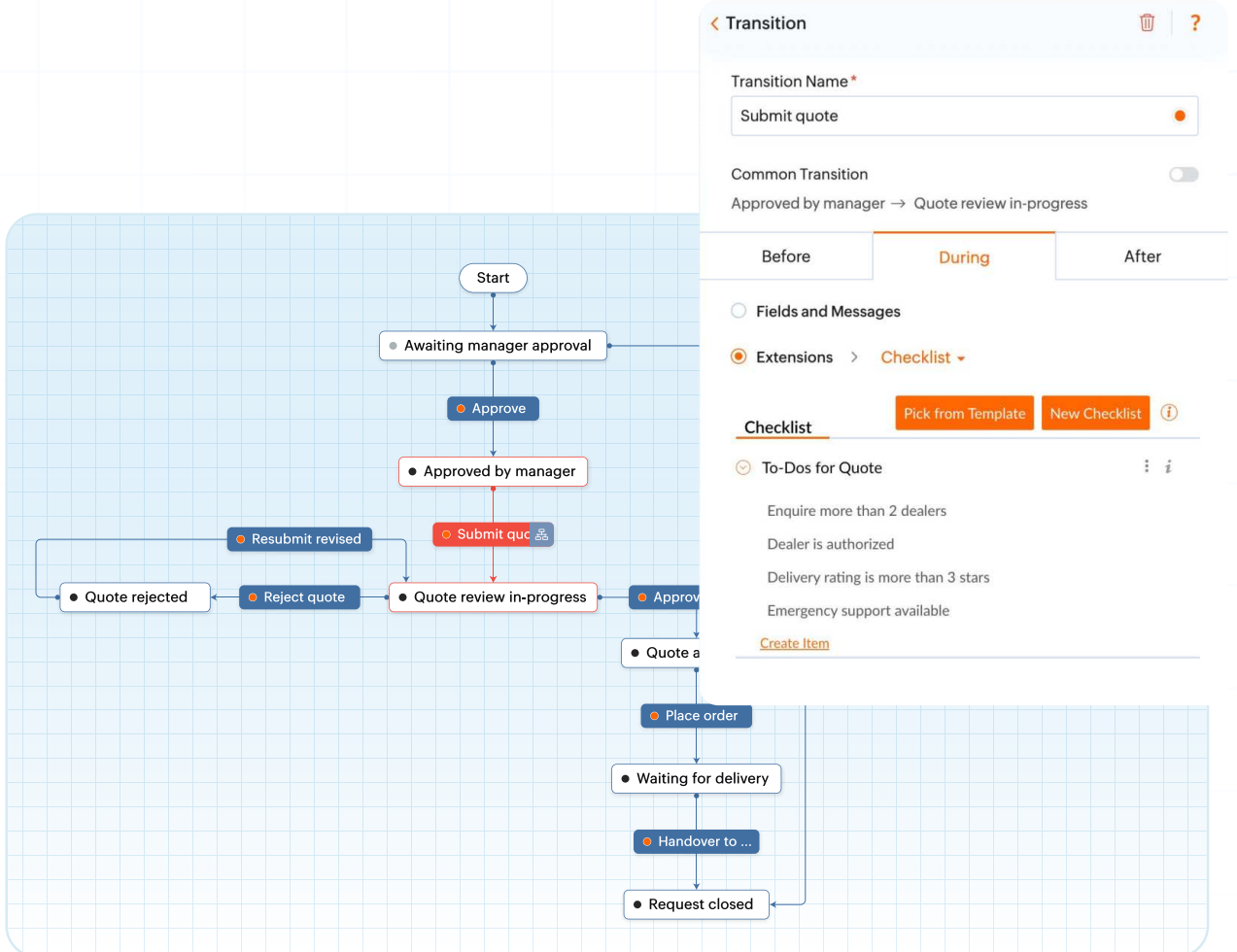
#Transition: Approve

Since approval can only be given by the manager, the access to perform this transition is restricted to the manager.



#Transition: Submit quote

During this transition, a checklist extension configured here displays a to-do list for obtaining a quote.

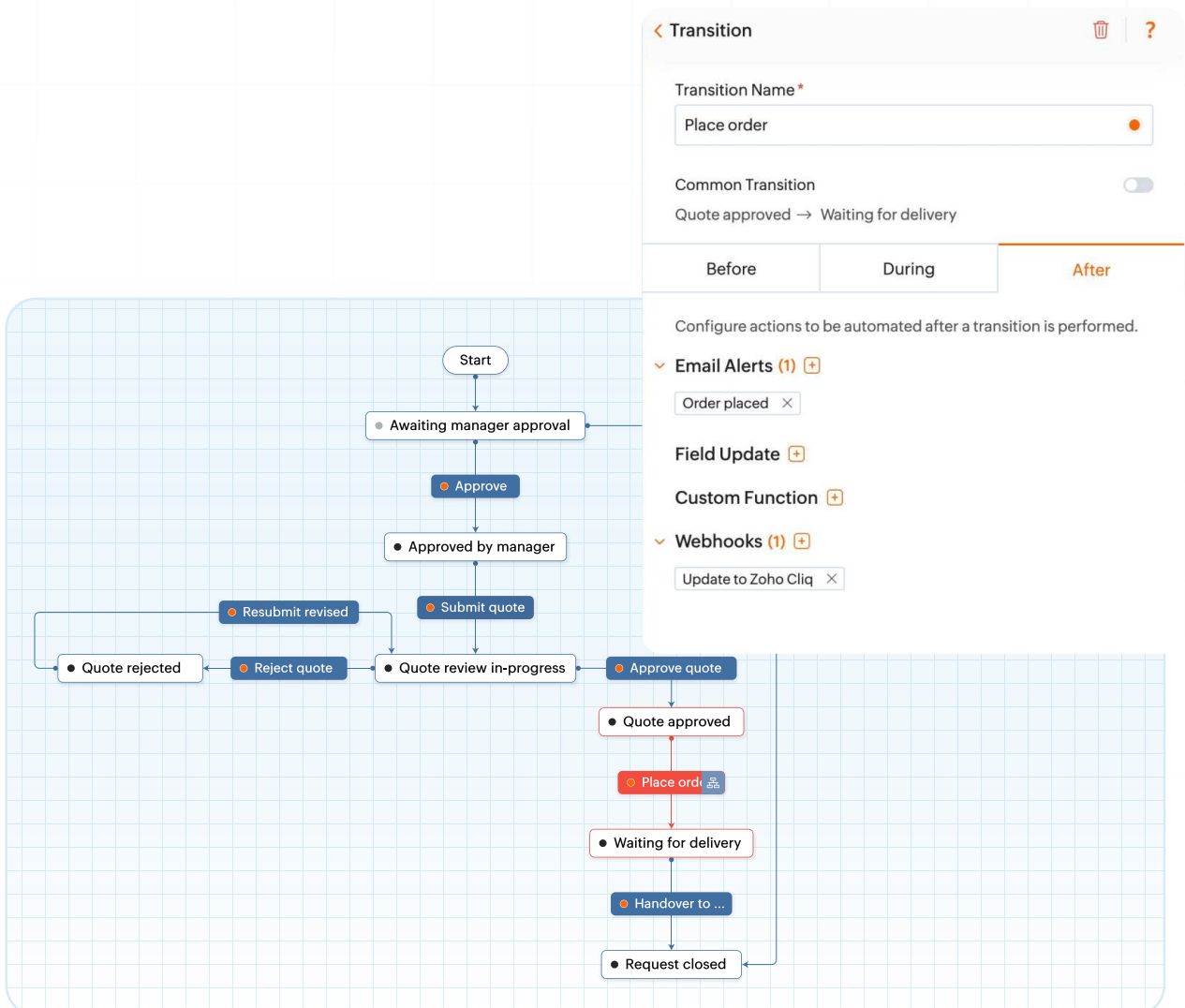


#Transition: Reject quote

This action can only be performed by the IT head, and so it's restricted in the Before section.

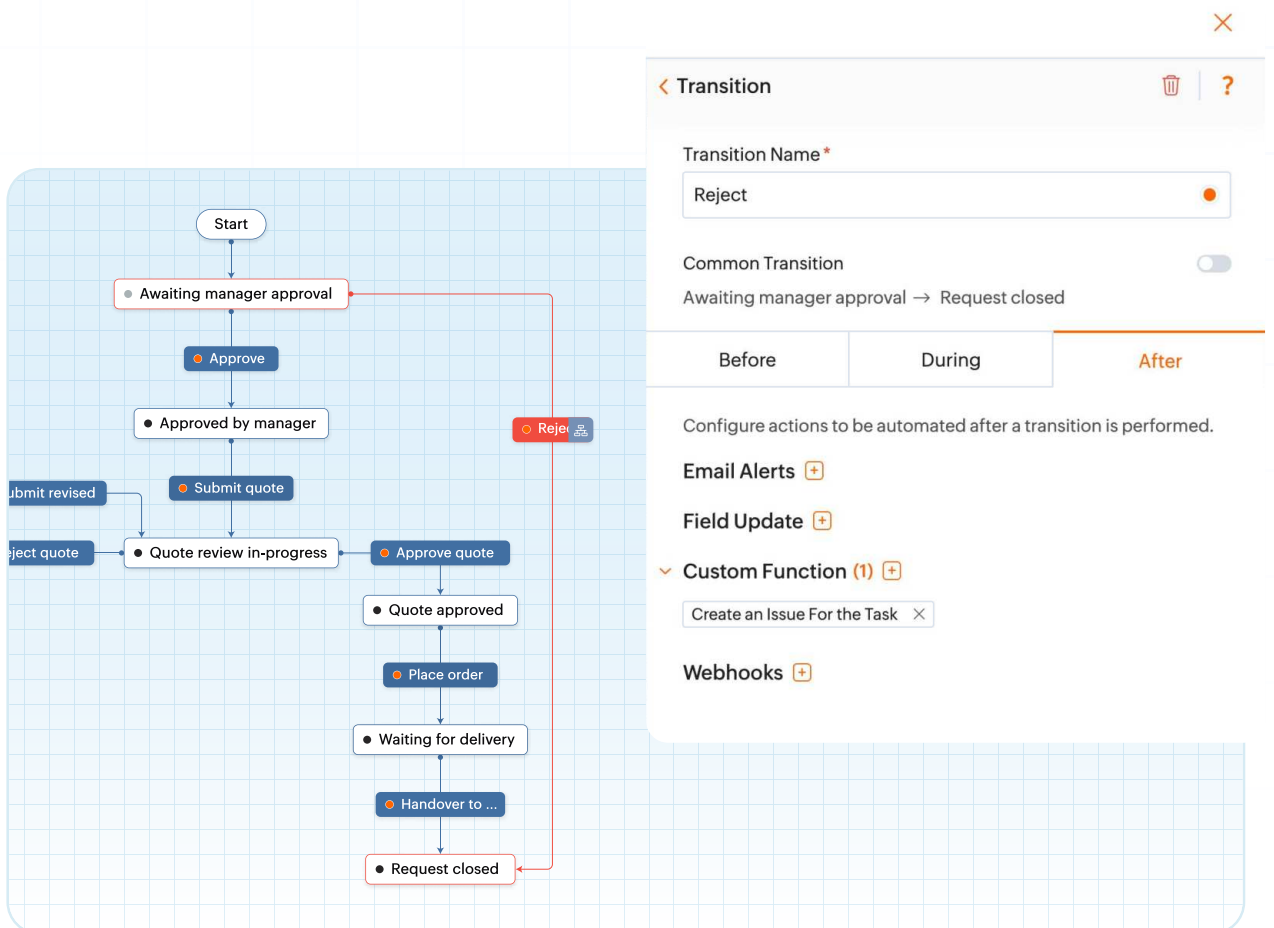
#Transition: Place order

After the order is placed, we can send out an update email to the employee, notifying them of their request's status. Webhooks can also be used to update the status in another service or software your requester uses.



#Transition: Reject

For requests that are rejected right at the first step, a custom function can be used to create an IT ticket. This way, the team can investigate the request further.



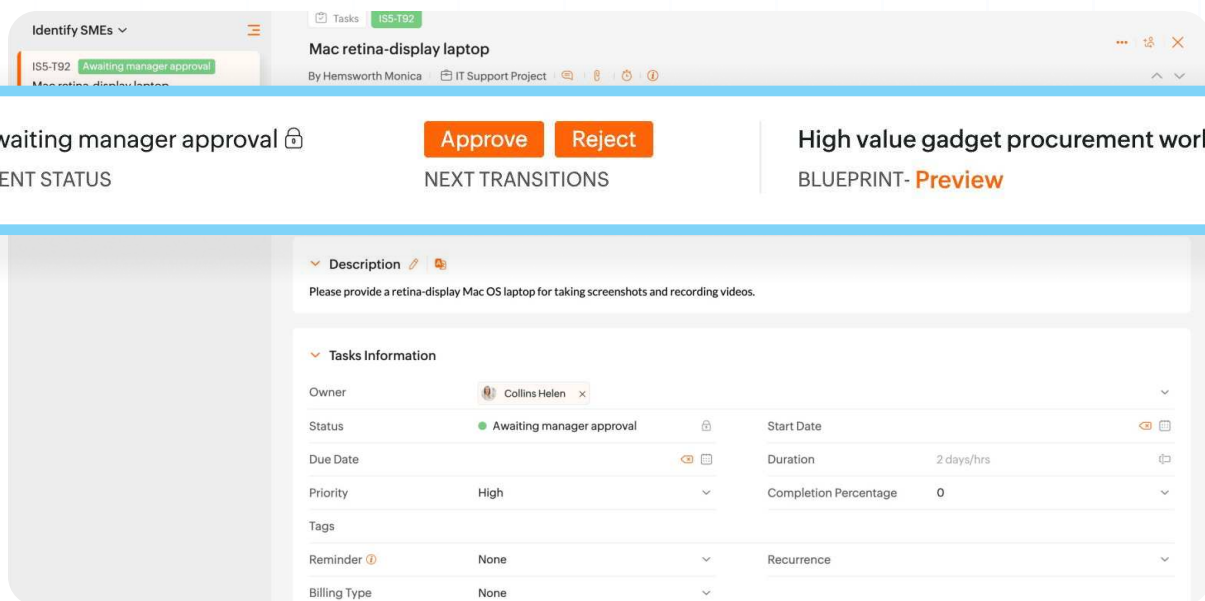
4

STEP

Test and execute

Once the blueprint is built, published, and associated with the relevant project, be sure to test it by creating a task in the project. You will be able to view the current status of the task, and the transition to be executed will be displayed as a button. Click the button to perform the transition.

Note: In our business case, approval is restricted to the manager, so only they will be able to view the transition buttons.



Similarly, dry-run the entire process to test the flow and track the execution of the configured actions for different scenarios.

You can always go back to enhancing the blueprint whenever you encounter a new scenario in your organization.

Benefits of automating tasks using blueprints

- 1 Automates repetitive tasks:** Processes help streamline redundant tasks that your employees deal with on a daily basis. Blueprints help reduce the mundane and concentrate on more important details.
- 2 Improves transparency:** Anyone who has access to the task will be able to preview the entire process and understand the flow of the task, increasing transparency within your teams and the organization.
- 3 Visual aid for new employees:** The process is represented as a flowchart, which is easy to understand at one glance. Even new employees can onboard easily.

- 4** | **Provides room for collaboration:** Processes in tasks allow multiple people to collaborate and complete the task. Apart from the task owner, there can be other project users like transition approvers, teams, and roles.

- 5** | **Comprehensive during remote work:** Tracking the progress of your team member does not require manual follow-ups anymore. A process showcases the current progress of a task right from the task details page.

- 6** | **Helps spot delays:** If a task extends its expected completion time, you will always be able to spot where the delay occurs. These bottlenecks can also be averted with updates to the process.

- 7** | **Covers multiple approvals:** Certain tasks may need multiple approvals—be it from the manager, other team members, or an employee with a specific role. Such instances can be easily handled with processes, ensuring no approval is missed.



Testimonial

Our very own **Zoho Sites** manages the release cycle using **Zoho Projects**

"We have been effectively utilizing Zoho Projects to manage our release cycle, from task creation to completion, with the help Blueprints. Blueprints have been crucial in our release management process, as its transitions help define the task flow and ensure smooth progress through each stage.

Depending on the specific challenges encountered during a release, we can add or modify steps as needed. This flexibility has been instrumental in ensuring successful and efficient releases. For instance, over the past five years, our team has systematically handled routine fixes, enhancements, hot fixes, and feature releases without facing significant challenges."

- **Abilash Unnikrishnan**, Zoho Sites



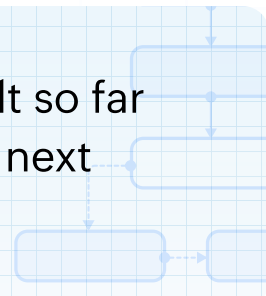
Summing up



Process automation using blueprints can cater to many industries and teams like finance, marketing, administration, sales, support, HR, real estate, construction, and so on. It opens doors to possibilities of standardizing and evaluating the way your teams work and circuits its way through multiple teams and approvals.

35k+

Blueprints have been built so far using Zoho Projects. The next could be yours!



Zoho Projects offers a built-in capability to digitize and automate your process right inside tasks. No matter the size of your business, our user-friendly interface helps you design and automate processes. Try the Blueprints feature in Zoho Projects today!



T H A N K Y O U

Help Documents:

<https://help.zoho.com/portal/en/kb/projects>

Webinar:

<https://www.zoho.com/projects/webinar.html>

Help Videos:

<https://www.zoho.com/projects/projects-videos.html>

Projects Community:

<https://help.zoho.com/portal/en/community/zoho-projects>

