Workflow Set Up

Discussion Points
Session Objectives

- Clarify current organizational set up
- Identify WF areas that need to be addressed
- Provide WF set up options for discussion
  - Present lots of questions
  - Provide direction
Questions:

- What is your Organizational set up – what is currently centralized/decentralized?
  - Functional
  - Technical
    - Environments (Dev/Test/Prod)
    - Multi Institution Functionality (MIF)?
Session Topics

- Discussion areas on workflow set up
  - Centralize or Decentralize??
  - Administrative
  - Technical
  - User
  - Email
Centralize or Decentralize?

- Centralize
  - WF System Maintenance (environments)
  - Requests
  - Technical (BCC)
  - New Users
  - Roles with administrative privileges
  - Migration to production
  - Post go live support
Centralize or Decentralize??
  • Decentralize
    • Model Build
    • Roles with little or no administrative privileges
    • Testing
    • Post go live monitoring and maintenance
Administrative Set up

- Workflow “Phases”
  - Workflow Request
  - Analysis and Specifications
  - Model Build
  - Technical components (triggers/sql procedures...)
  - Initial testing
  - System testing (users)
  - New user requests
  - Implementation (move to production)
  - Post go live (monitor, support, revisions)
Workflow “Phase”: Workflow Request
- Who can make requests?
- How are requests made?
- What information is needed?
  - Department
  - Workflow purpose (high level)
  - Initial business analysis???
- What happens with the request?
  - Prioritized
  - Estimated???
  - Response back to requestor
Administrative Set up

- Workflow “Phase” : Analysis and Specifications
  - Business Process Analysis
    - Who will do this?
    - What is needed?
  - Workflow Process Analysis
    - Who will do this?
  - Technical requirements
    - What Trigger/sql/procedures are needed?
      - Needed for estimates and technical resources
    - Do the technical objects already exist?
Workflow “Phase”: Model Build
   ◦ Who is going to build the model?
   ◦ Naming conventions are recommended
   ◦ Workflow administrator role
      • Functional owner
      • Has WF Status Search options
   ◦ Workflow owner role
      • Technical owner
      • Same privileges as Administrator
      • Notified if WF “breaks” or is stopped
      • Notified of missed deadline (metrics option)
Workflow “Phase”: Technical components
- Triggers/sql/stored procedures/scripts as needed
- Create BCC Categories to organize
- Naming conventions and standards are recommended
  - Needed for Banner Upgrades
- Centralized to keep track of what is available
  - Going to be important to maintain versions once in production
Workflow “Phase”: Initial testing
- Done by the builder
- Technical components should be in place or use place holders
- Roles/users can be established later
- Make emails go to testers only
  - Suggestion: Create roles for email testing
  - Put the “real” address in the email body for testing
- Involve power users to make sure everyone is on the same page
Workflow “Phase”: System testing (users)
- Determine who will do the system testing
- Where will the system testing be done?
  - Migrate to non-production environment to verify migration procedure
- End users should create test cases
  - Test every activity and every path in the workflow
  - Test good cases and “bad” cases
- User sign off
Workflow “Phase”: Implementation
  ◦ Migrate to production
    • Workflow provides export/import feature
    • Manual effort is required – events
    • All code and technical objects must be moved to production
      • Privileges must be granted in production
      • WFAUTO must have access to all tables in stored procedures and sql statements
      • WFAUTO must have execute privileges on procedures
    • Users must be added to production
      • Users must be assigned correct roles
Administrative Set up

- Workflow “Phase”: Implementation (centralized)
  - Create workflow directory/subdirectories
  - One folder for each workflow
    - Analysis and specifications
    - User procedures/training materials
    - Model .pdf
    - Migration documentation
    - Technical objects scripts
    - Any supporting documents
Administrative Set up

- Workflow “Phase”: Post go live
  - End User support
  - Monitor workflows for “issues”
    - WF Alerts (WF Owner)
    - In process monitoring – user
    - External Events – user
    - Workflow Status Search – user
    - Returned emails – standard email addresses
  - Consider Plan B if workflow should fail
    - What are the “risks” and recovery steps
  - Procedure for revisions to production workflows
  - Quantify the WF Benefits
    - Time and effort saved
Administrative Set up

Summary
  ◦ Naming conventions
    ◦ Models
    ◦ Business events/Business processes
    ◦ Technical objects/BCC
    ◦ Roles
  ◦ Procedures
    ◦ Business Processes
    ◦ Workflow requests
    ◦ New workflow users
    ◦ Implementation/Migration
Technical Set up

- Environments
  - How many WF environments exist
  - What are they used for
  - What is the migration plan
  - Database refreshes – don’t lose in progress work
  - Regular backups
    - Workflow exports

- Set up standards for WF objects
  - Naming conventions
  - Object owners
User Set up

- Roles and responsibilities
  - Types of users
    - System Administrators
    - WF Business Analysts
    - Power Users (end users with privileges)

- WF Security groups (Workflow system admin)
  - Secured roles
  - Which security groups for which users
    - Demonstration and spread sheet
Email Set up

- Email “FROM” Address (single email addr)
  - Set up one or more addresses from each office
  - Someone needs to monitor this and know what action to take

- Email “TO”, ”CC”, ”BCC” Addresses
  - Distribution lists
    - Easily maintained outside of workflow
  - Roles
    - Email addresses must be in workflow
  - Last option – hard code email address
    - If the address changes, must change the model
Email Set up

- Email Address construction option
  - Use context parameter
  - User name followed by “/WF”
  - Role name followed by “/ROLE”

- Email address examples
  - Testing
    - Create Testing Email Role
    - Add/subtract workflow users as needed
QUESTIONS???

Thank you