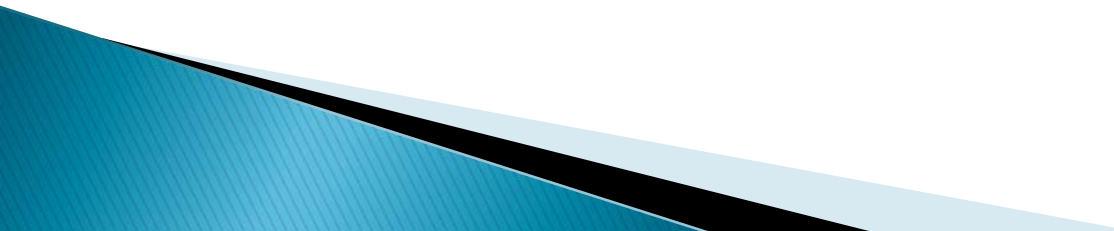


Workflow Set Up

Discussion Points

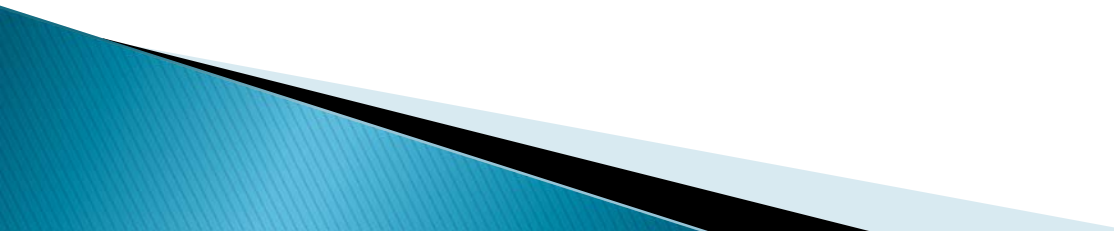
Session Objectives

- ▶ 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
- 

Session Objectives

- ▶ 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
- 

Administrative Set up

- ▶ Centralize or Decentralize?
 - Centralize
 - WF System Maintenance (environments)
 - Requests
 - Technical (BCC)
 - New Users
 - Roles with administrative privileges
 - Migration to production
 - Post go live support

Administrative Set up

- ▶ 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)

Administrative Set up

- ▶ 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?

Administrative Set up

- ▶ 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)

Administrative Set up

- ▶ 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

Administrative Set up

- ▶ 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

Administrative Set up

- ▶ 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

Administrative Set up

- ▶ 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