



Laserfiche  
EMPOWER2015

# Getting Started with Workflow

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 #EMPOWER15

**Laserfiche**<sup>®</sup>  
Run Smarter<sup>®</sup>

# Audience

- ▶ Basic familiarity with the Laserfiche Client
- ▶ Basic familiarity with metadata
- ▶ (Relatively) new to Laserfiche Workflow

# Plan

- ▶ Diagramming business processes
  - Breaking processes into steps
  - Diagramming processes
- ▶ Laserfiche Workflow
  - What is it?
  - What is it good for?
- ▶ Building a workflow
  - Basics of the Workflow Designer
  - Familiarity with key activities

# Diagramming Business Processes

# What is a business process?

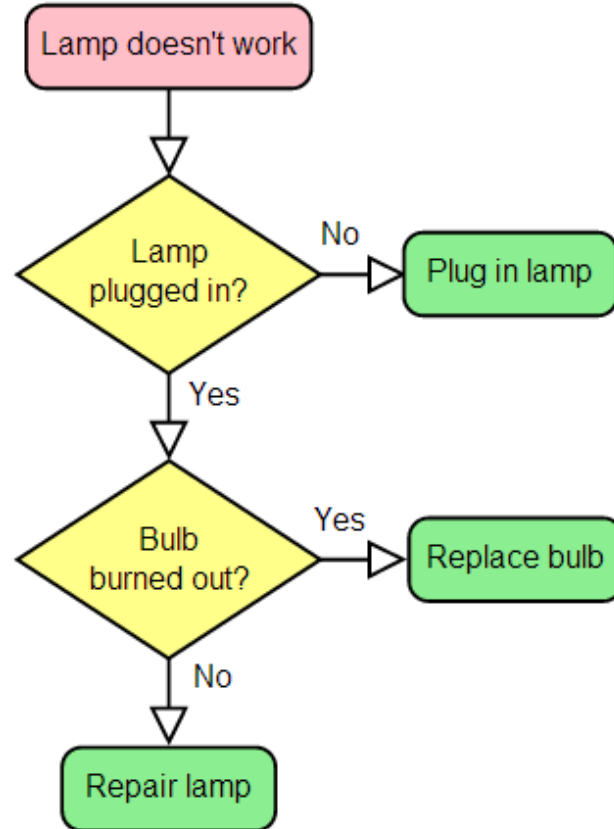
- ▶ A set of activities or tasks that accomplish a specific organizational goal

# What is a business process diagram?

- ▶ A graphical representation for specifying business processes
- ▶ Shows steps as boxes
- ▶ Shows order with connecting arrows

# What is it?

## Flowchart



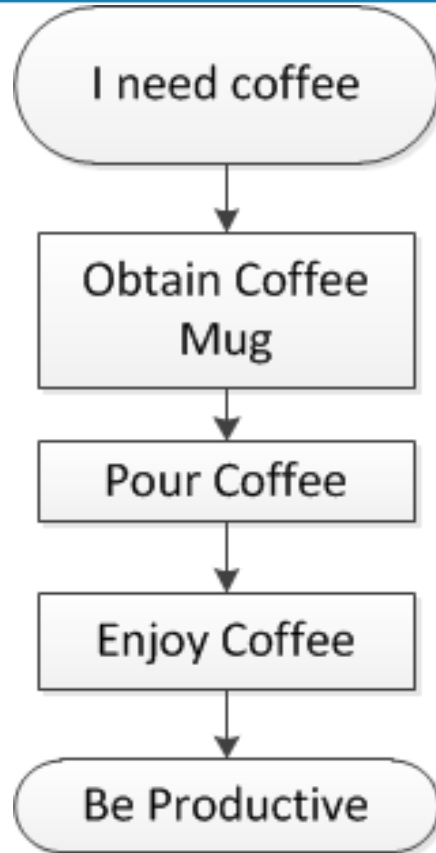
# Why should I do it?

## **I am tired and I need coffee business process**

This process describes the activities involved in obtaining additional energy via caffeine for the body. The process is triggered when an individual requires caffeine as a stimulant to ensure high productivity, efficiency and performance. It is assumed that users are responsible for maintaining and cleaning the drinking utensils, coffee mugs in this case. Once a coffee mug is obtained the user will find their way to the coffee pot. With the coffee pot in hand, the coffee mug can now be filled with the caffeinated water. The user is now in possession of the much needed stimulant and can consume it as needed. The stimulant will take effect approximately 20 minutes after consumption, after which point the user can work to maximum potential.

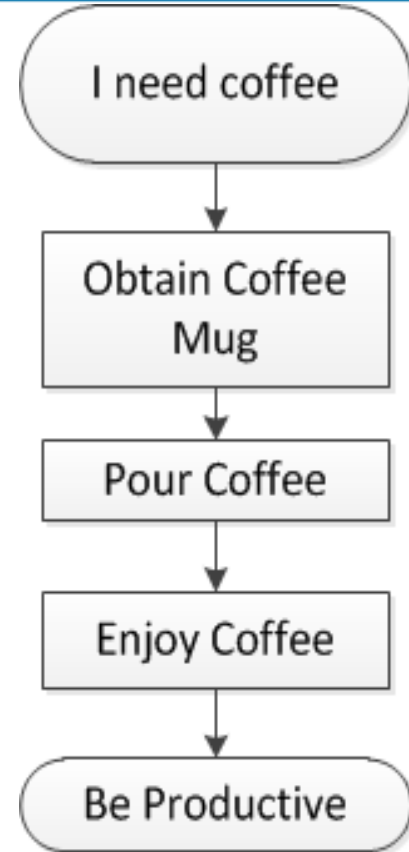


# Why should I do it?

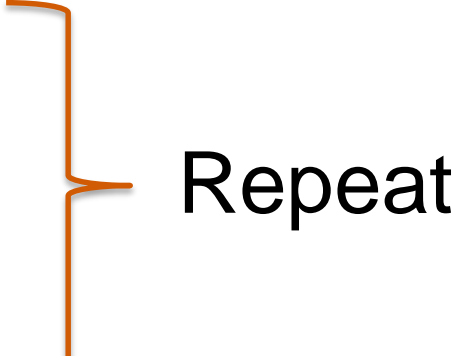


# Why should I do it?

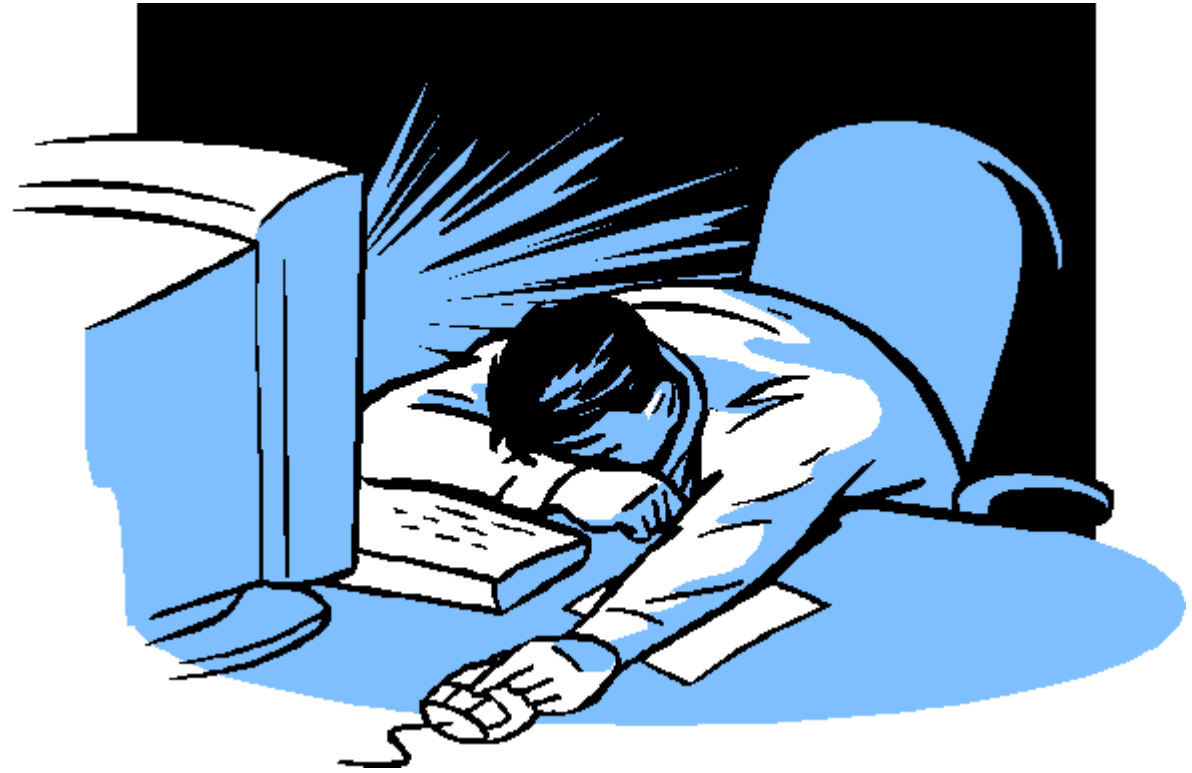
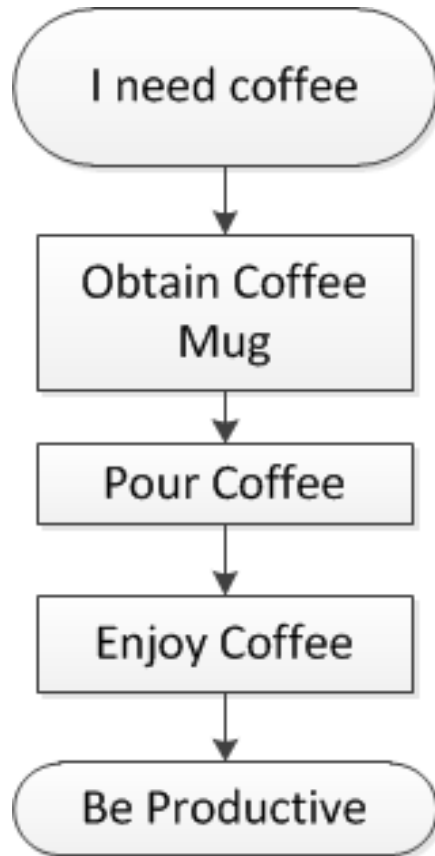
1. Due diligence
2. Improve the process
3. Translate to Laserfiche
4. Effective method of documentation



# How?

1. Current state diagram
  2. Interview(s)
  3. Diagram process
  4. Analysis
- Repeat
- 

# How? Step 1 – Current state diagram



# How? Step 2 – Interview(s)

1. Project owner(s)
2. IT
3. Participants

# How? Step 2 – Interview(s)

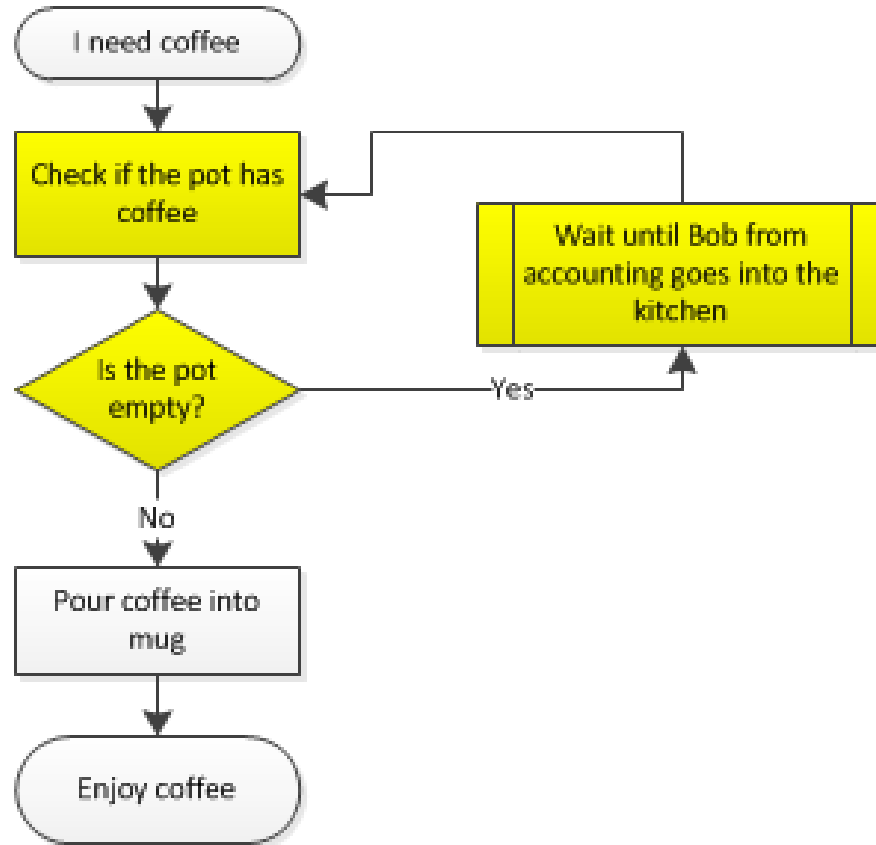
- Big picture
- Identify core requirements
- Identify nice to haves
- Identify limitations

# How? Step 3 – Diagram Process

Add details to your last diagram

- Information obtained in interviews

# How? Step 3 – Diagram Process

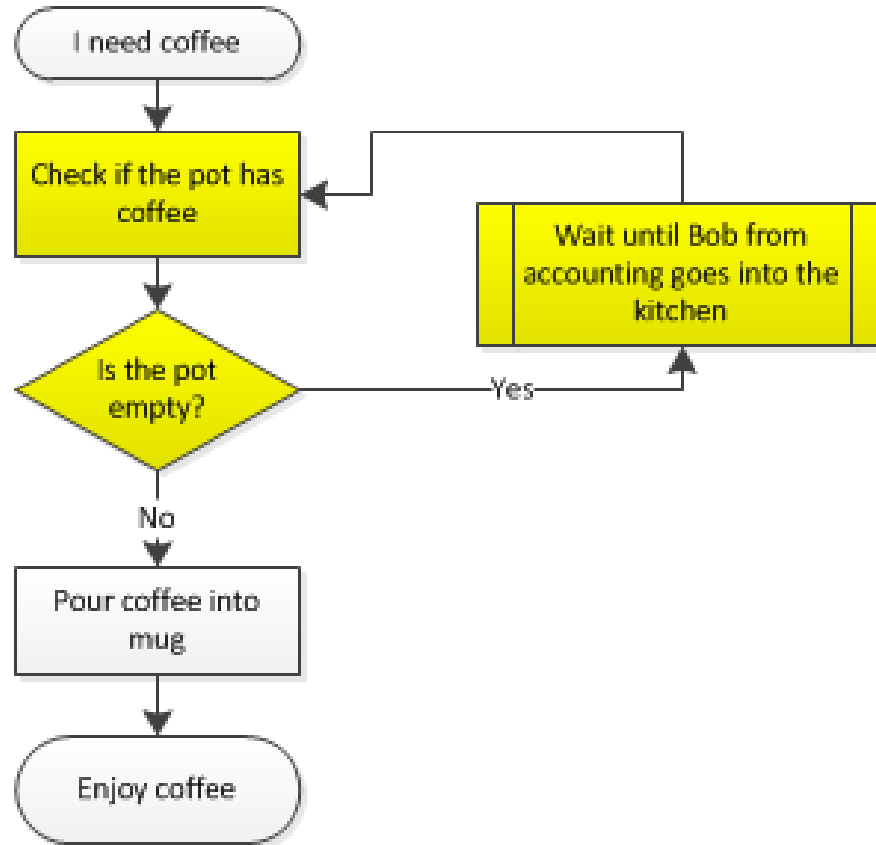




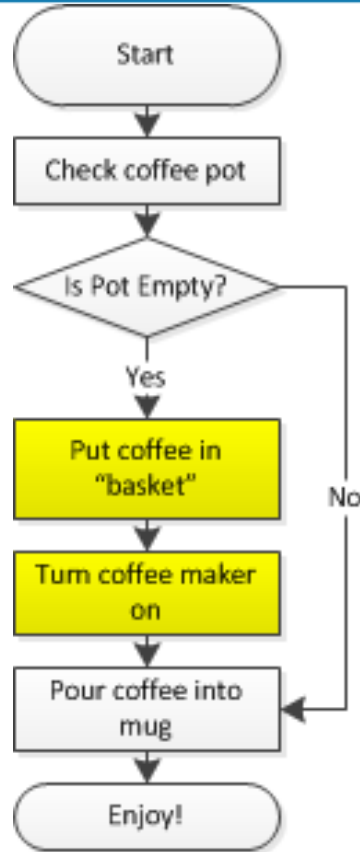
# How? Step 4 – Analysis

- Big picture
- Inefficiencies? Improvements?
- Future changes to the process?
- Order and sequence
- Bottlenecks
- Repetition
- User adoption concerns

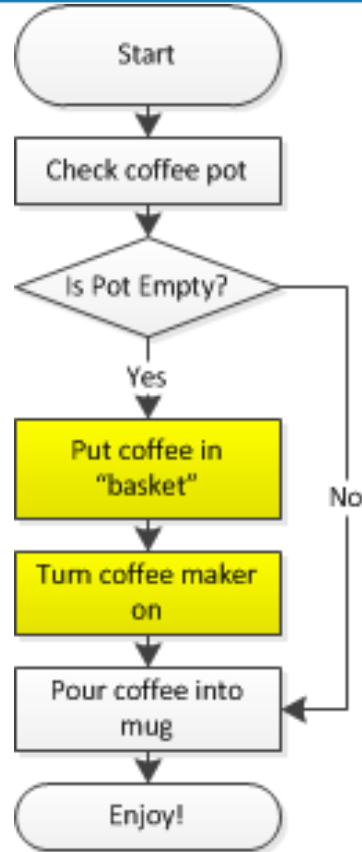
# How - Analysis



# How? - Diagram Process



# How? - Analysis



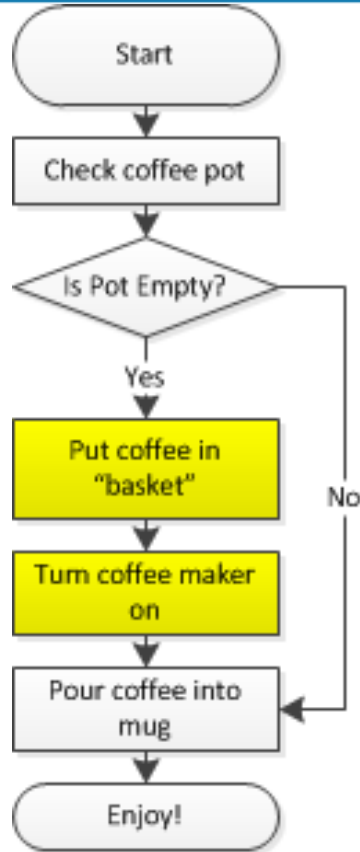
# Pro Tip

Visualize the process!

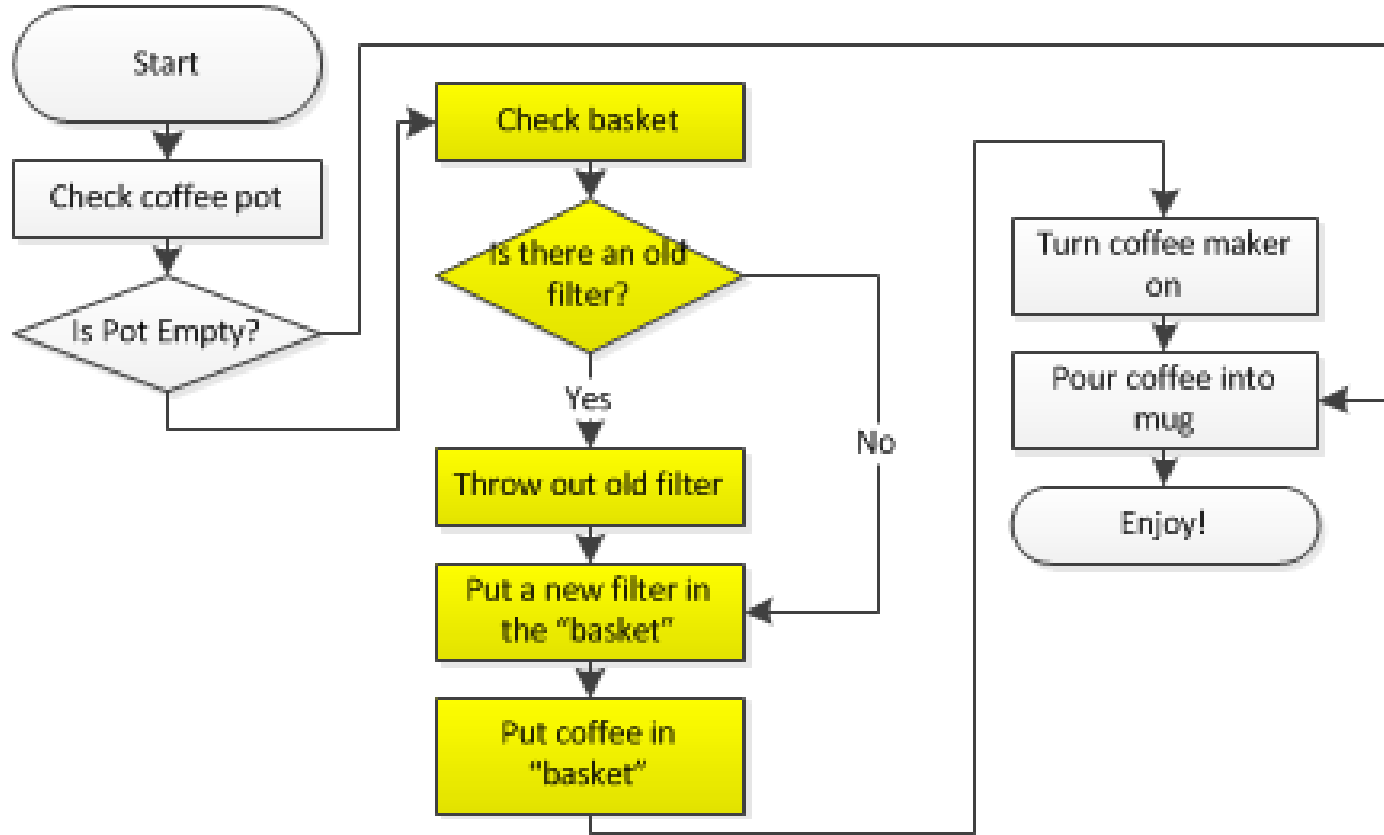
# How? – Analysis



# How? - Analysis

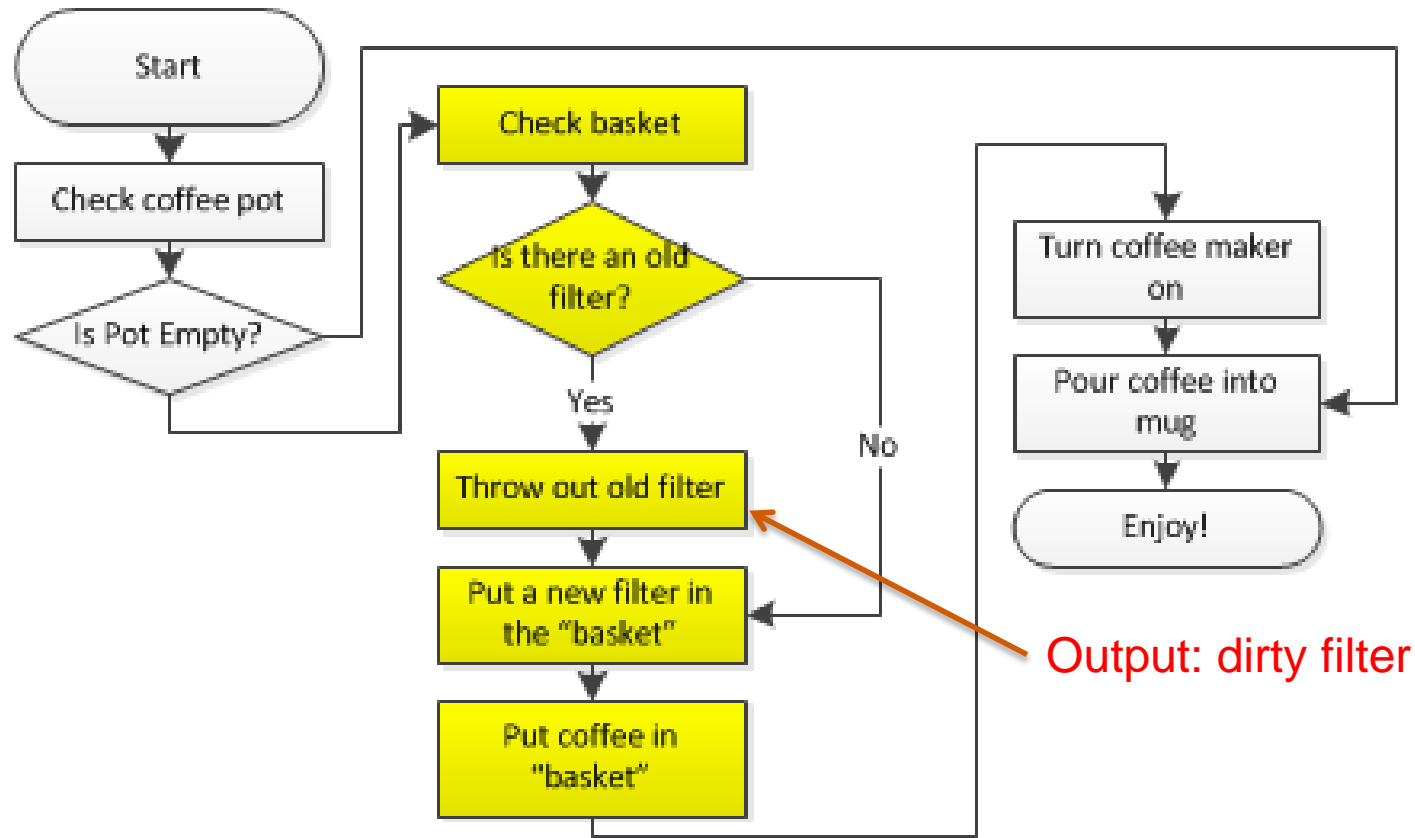


# How? – Analysis > Diagram Process

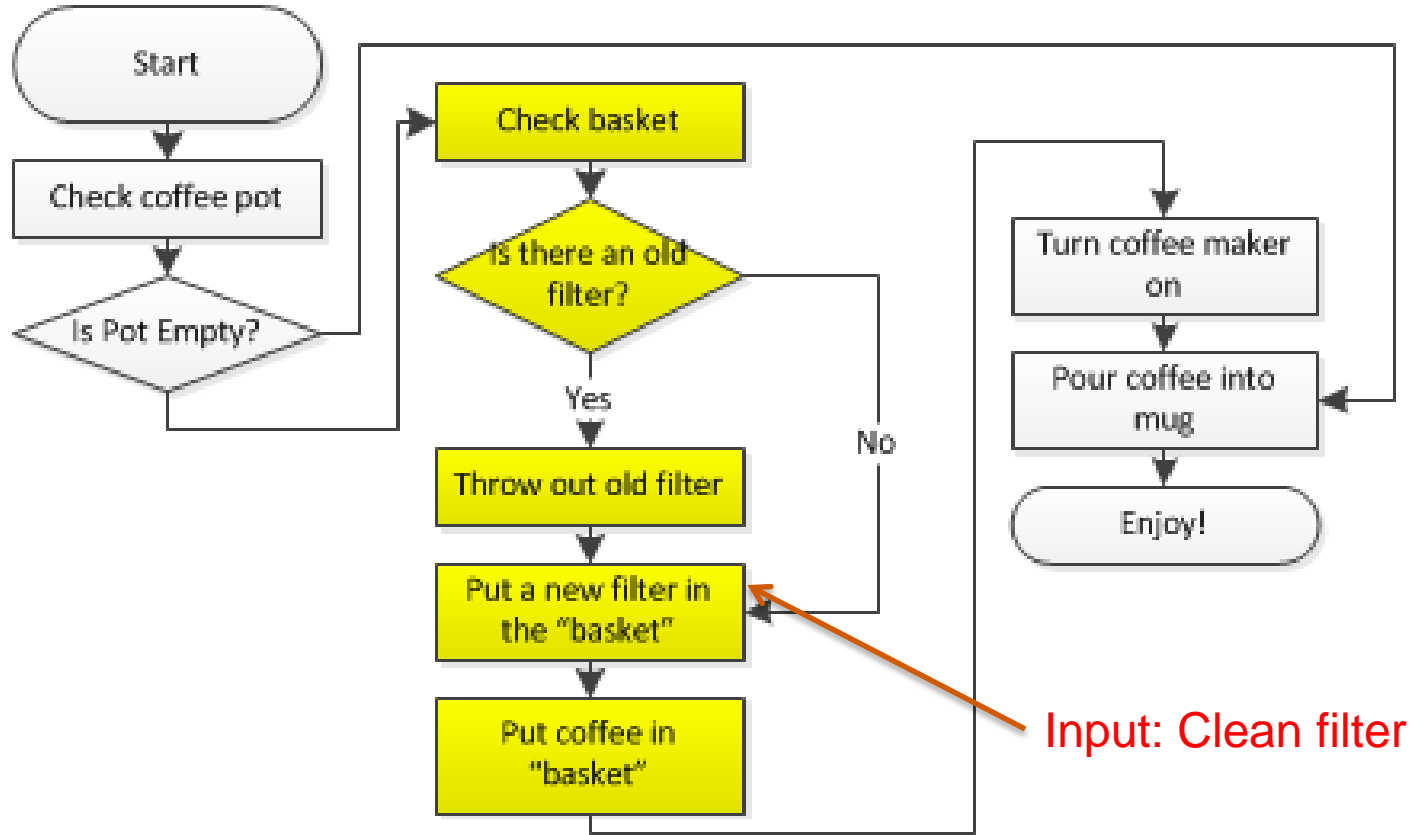




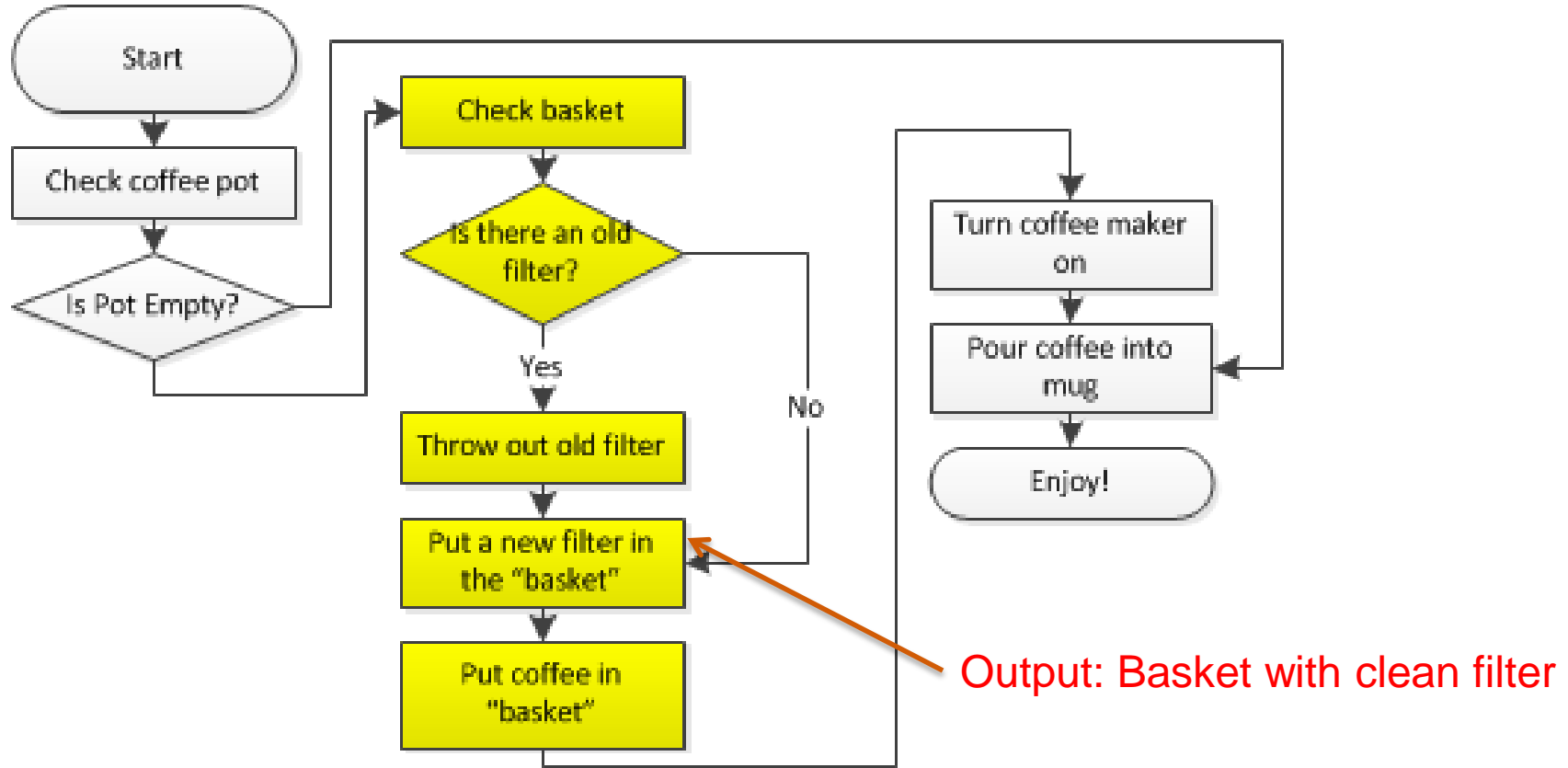
# How? – Analysis > Diagram Process



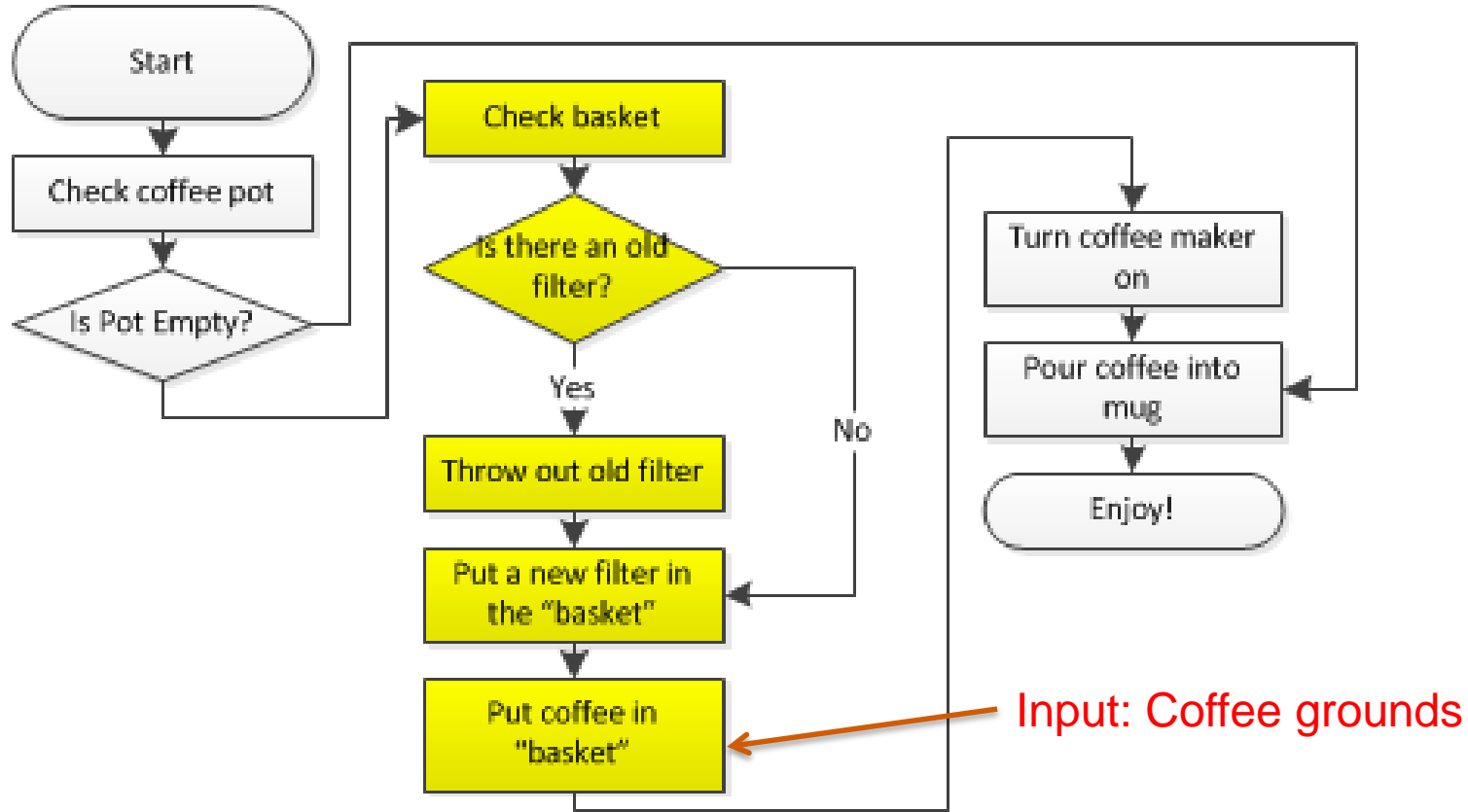
# How? – Analysis > Diagram Process



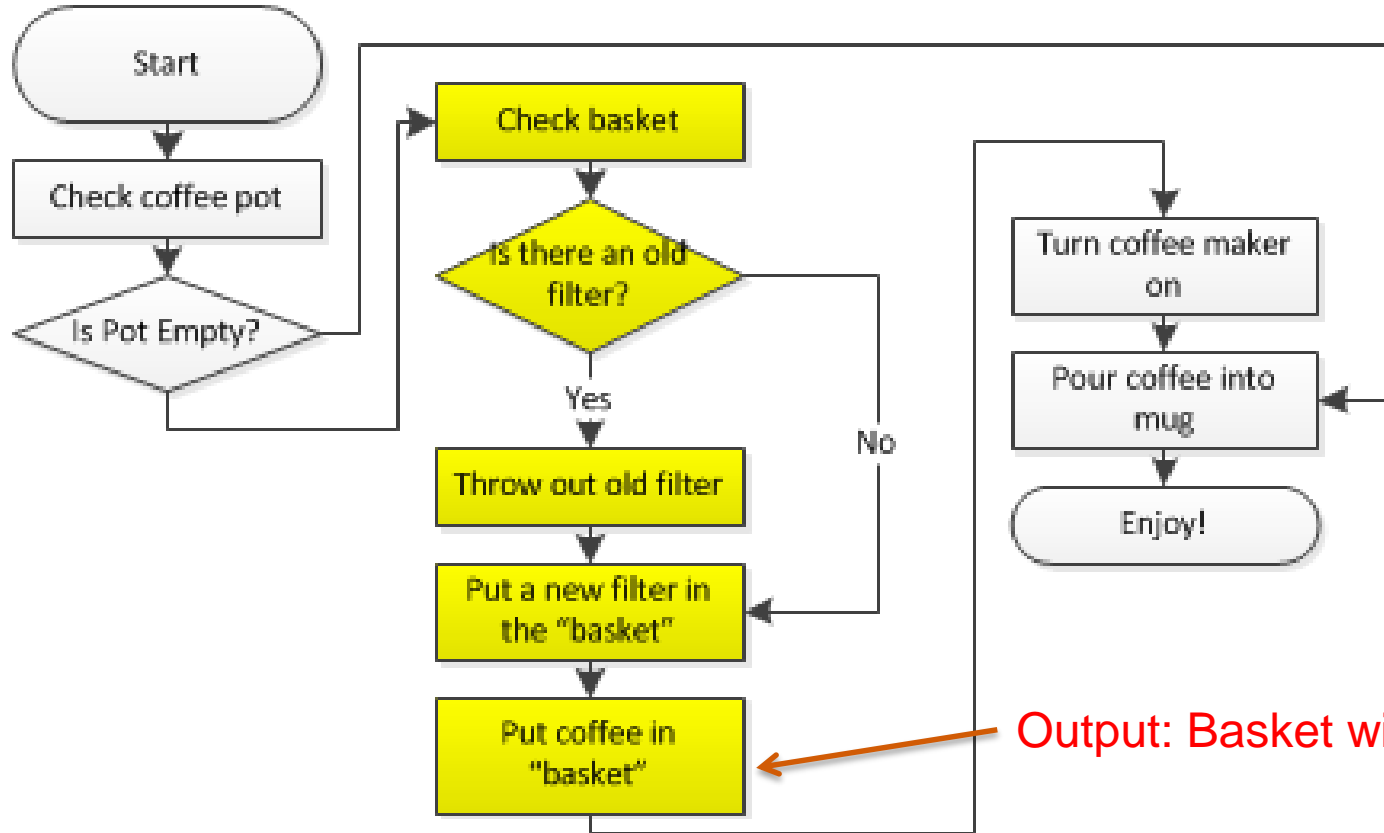
# How? – Analysis > Diagram Process



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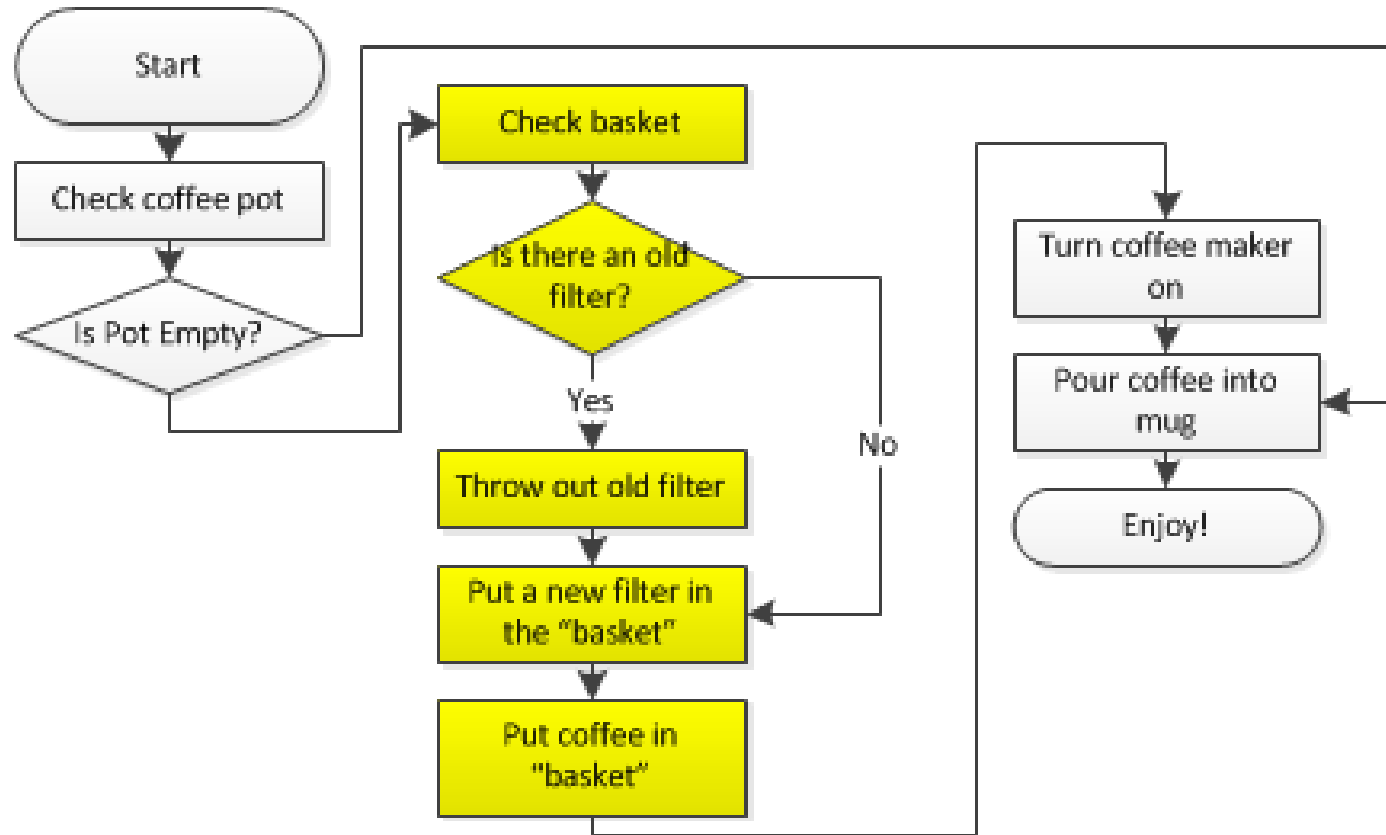


# How? – Analysis > Diagram Process



Output: Basket with fresh grounds

# How? – Analysis



# How? – Analysis

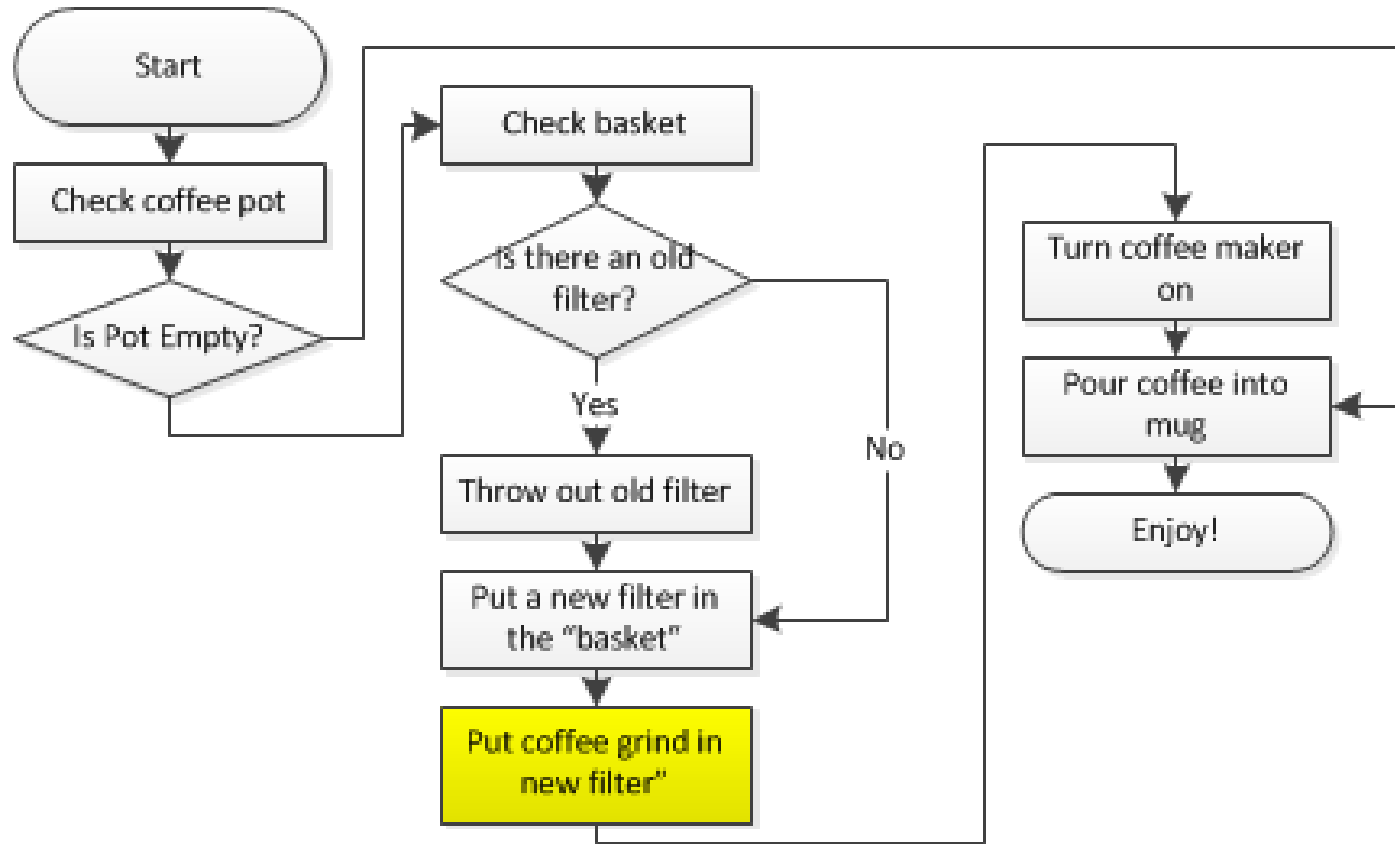


# Pro Tip

1. Be specific, unambiguous
2. Use clearly defined terminology



# How? – Analysis > Diagram Process



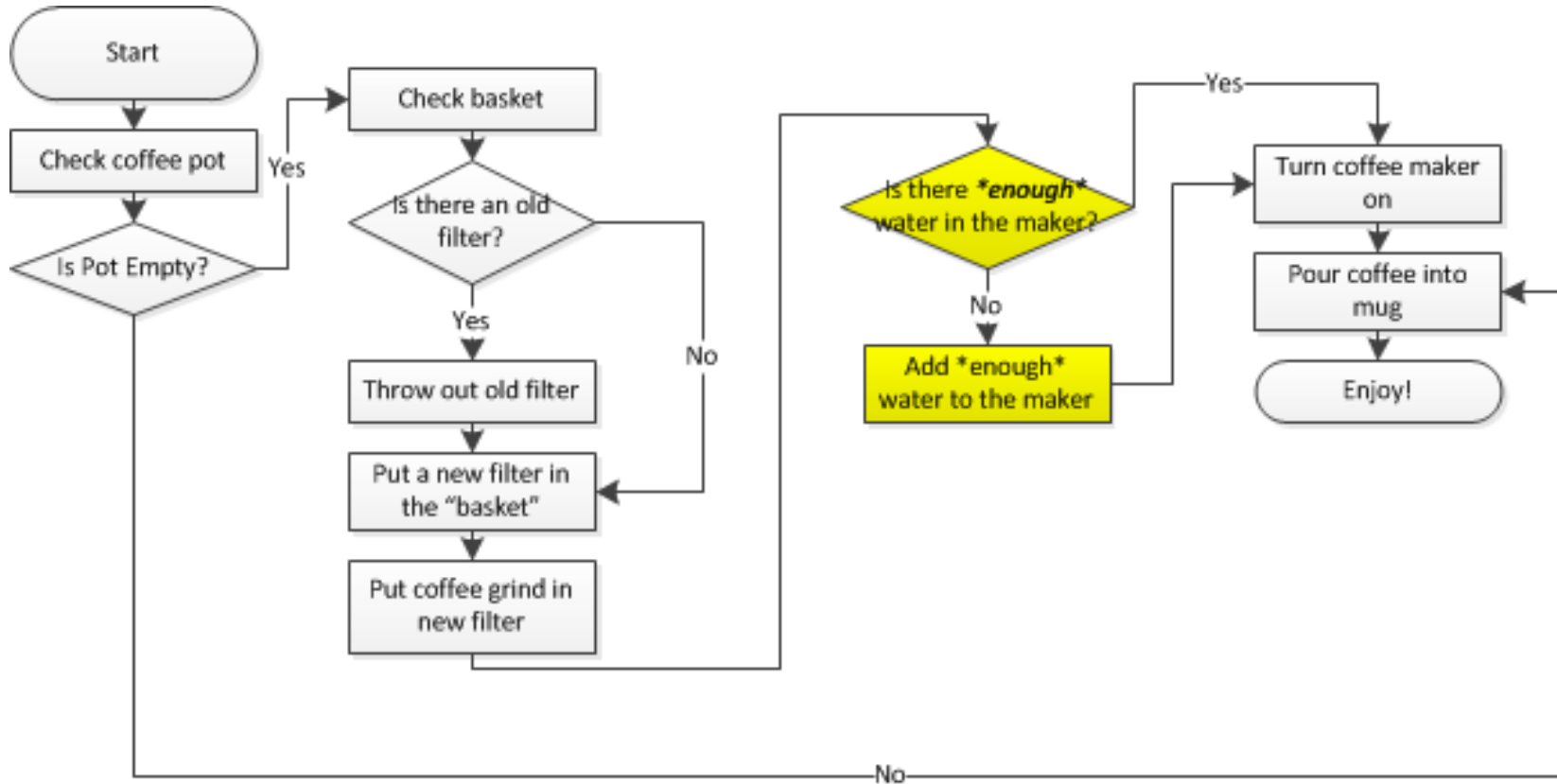
# How? – Analysis



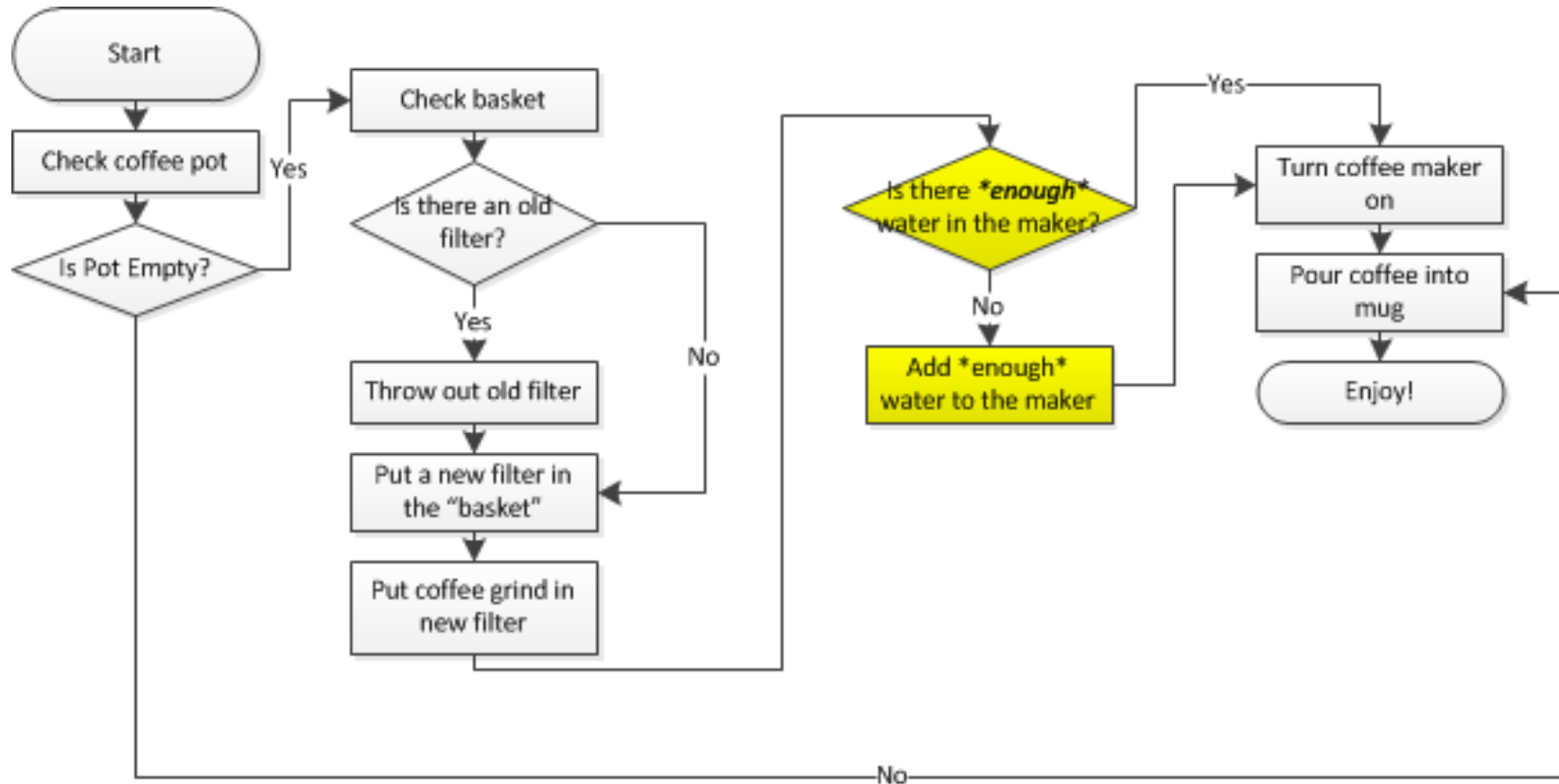
# Pro Tip

Don't make any assumptions

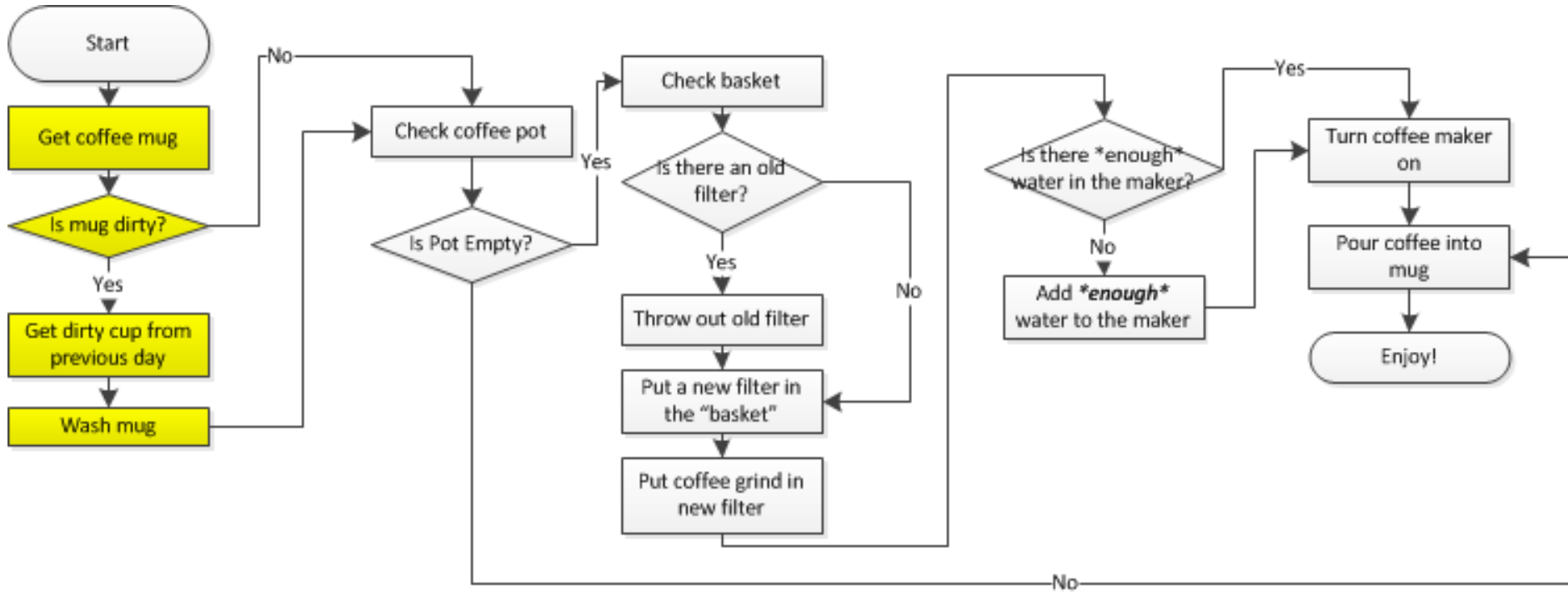
# How? – Analysis > Diagram Process



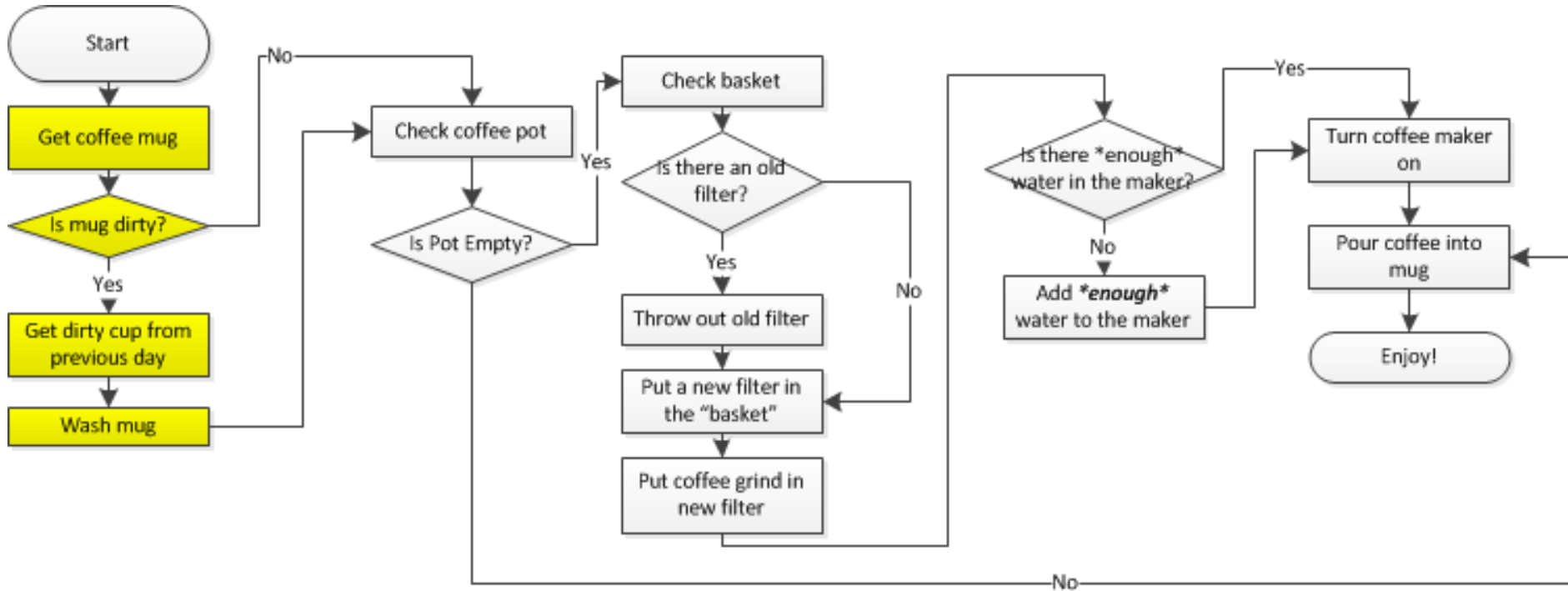
# How? – Analysis



# How? – Analysis > Diagram Process



# How? – Analysis

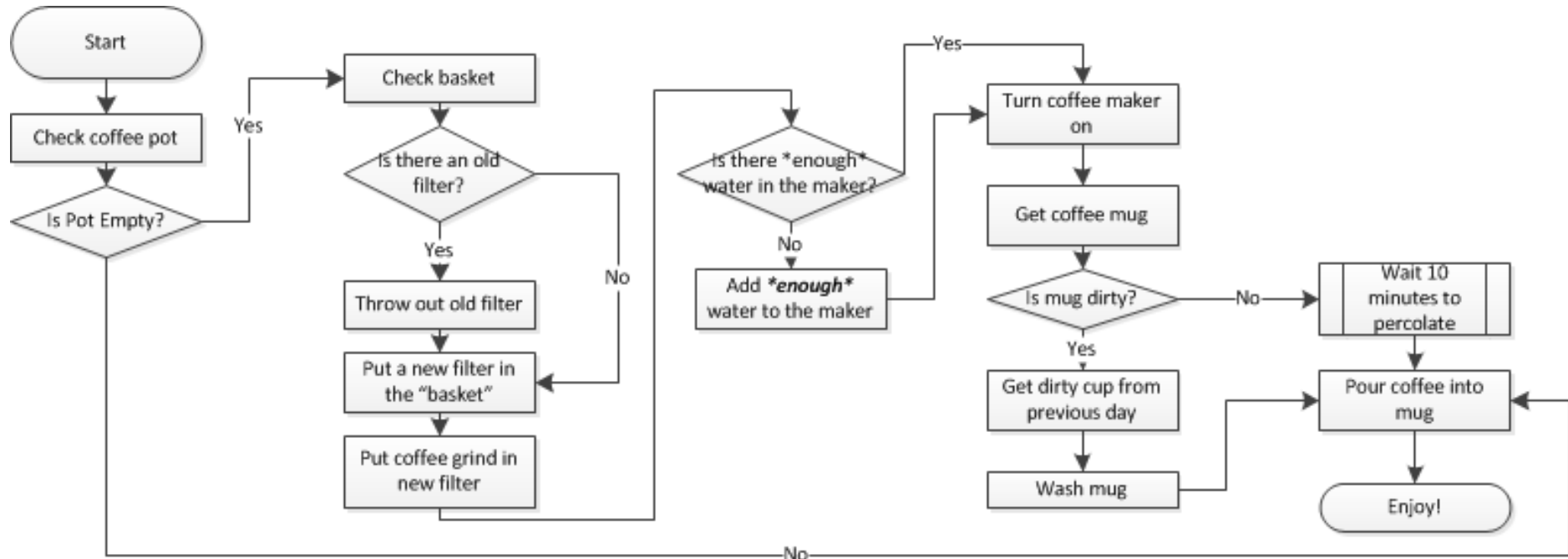


# How? – Interview Questions


1. What is the overall goal of the process?
  2. What triggers the start of the process?
  3. What signals the end?
  4. What determines the start and end of each step?
  5. Who is involved in each step?
  6. Are there any alternative routes in the process?
  7. How often does this process occur?
  8. Decision Outcomes
    1. Success
    2. Failure
    3. Outlier scenarios – What if?
    4. Deadlines
- Assumptions? Consult with project owner.



# Translating to Laserfiche



# Process Diagramming Recap

- Don't forget the big picture
- Save time and effort
- Loop
  - Interview
  - Diagram
  - Analyze
- Diagramming = 

# Workflow: What is it?

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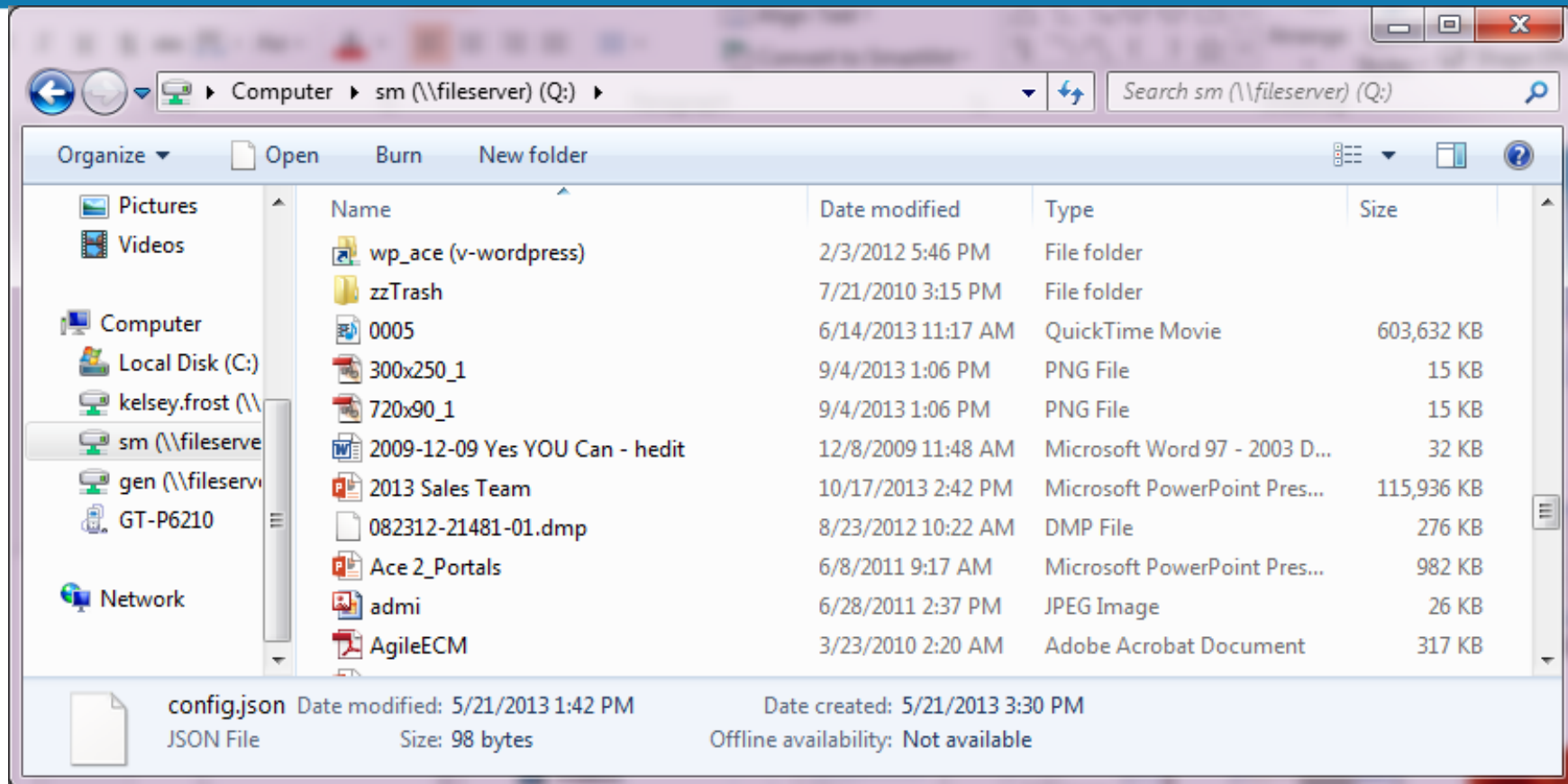
- ▶ An automation tool
  - Precise
  - Tireless
  - Lightning-quick
- ▶ Your virtual personal assistant

# Workflow: What is it good for?

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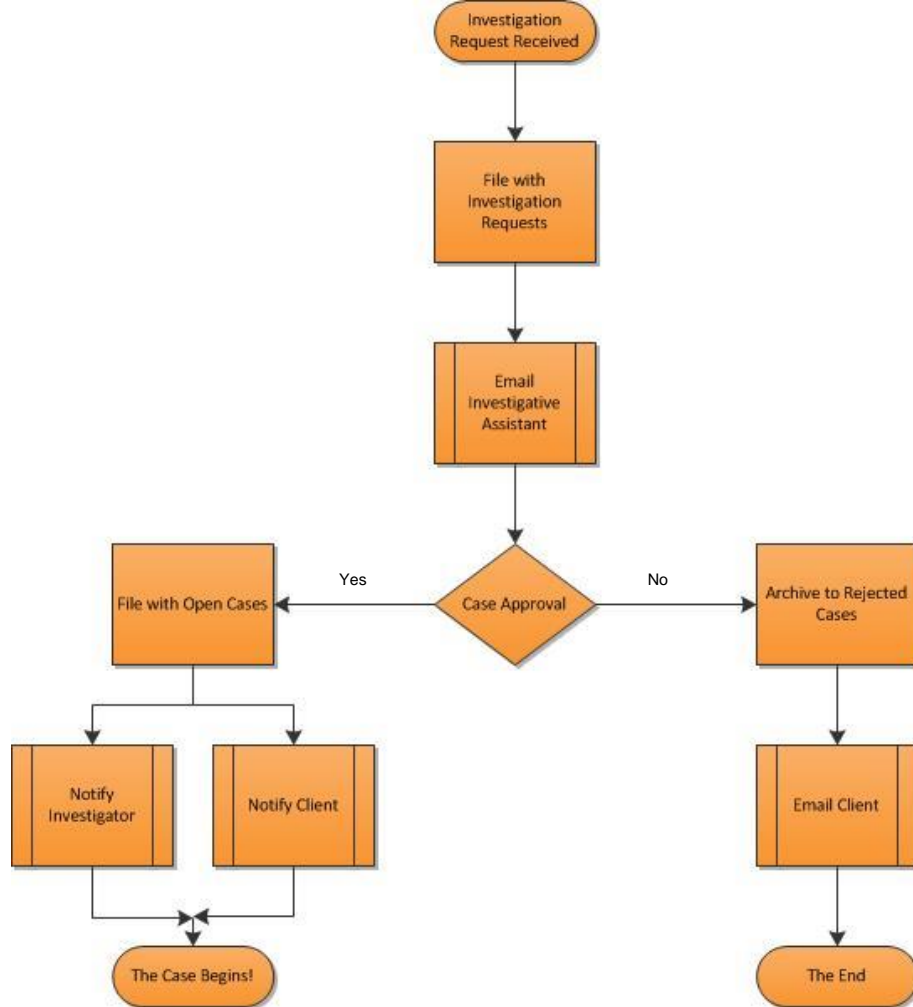


# Workflow: What is it good for?



# Building a Workflow!





# Hands-On Lab

# Tips

- ▶ Plan ahead
- ▶ Starting rules
- ▶ Search pane
- ▶ F1: Help files

# Conclusion

- ▶ Workflow is
  - Powerful
  - Easy to learn
  - Your virtual personal assistant