



Laserfiche
EMPOWER2015

Getting Started with Workflow

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 #EMPOWER15

Laserfiche[®]
Run Smarter[®]

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?

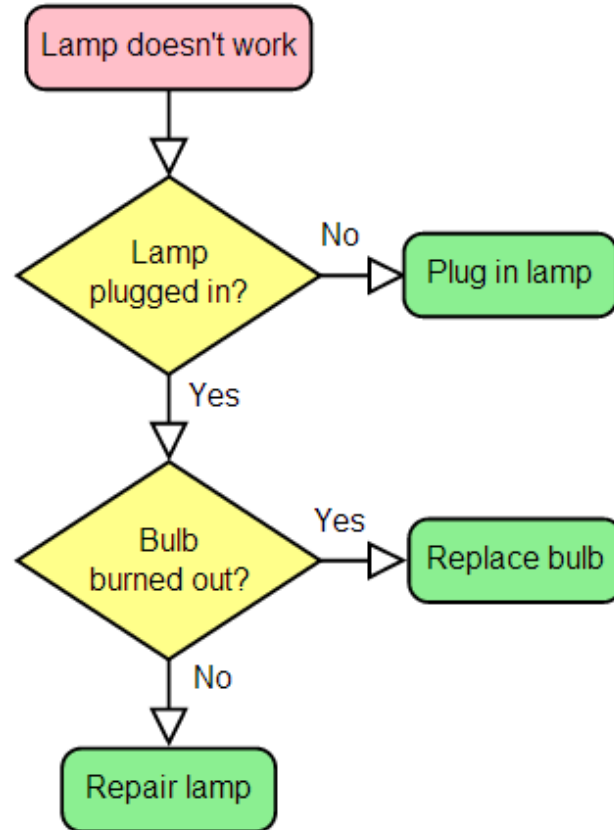
- ▶ A set of activities or tasks that accomplish a specific organizational goal

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

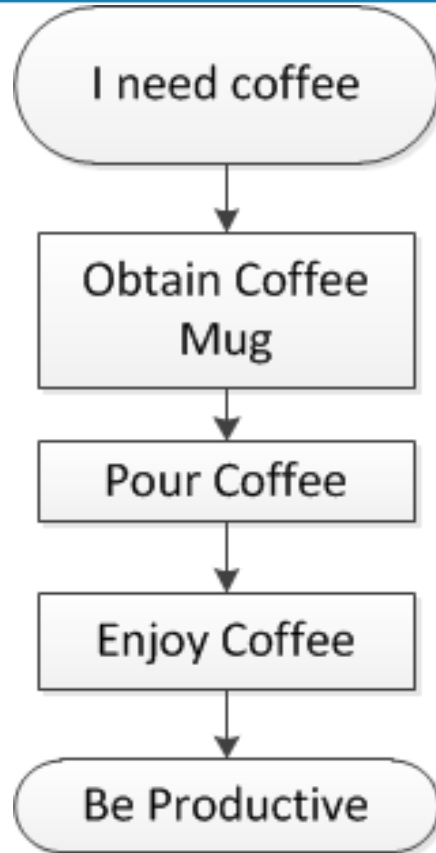


Why should I do it?

I am tired and I need coffee business process

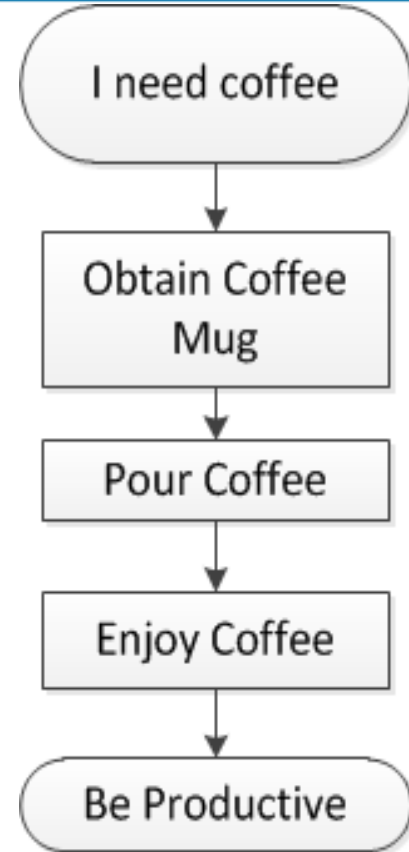
This process describes the activities involved in obtaining additional energy via caffeine for the body. The process is triggered when an individual requires caffeine as a stimulant to ensure high productivity, efficiency and performance. It is assumed that users are responsible for maintaining and cleaning 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?

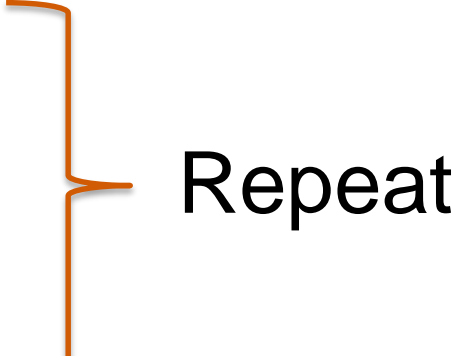


Why should I do it?

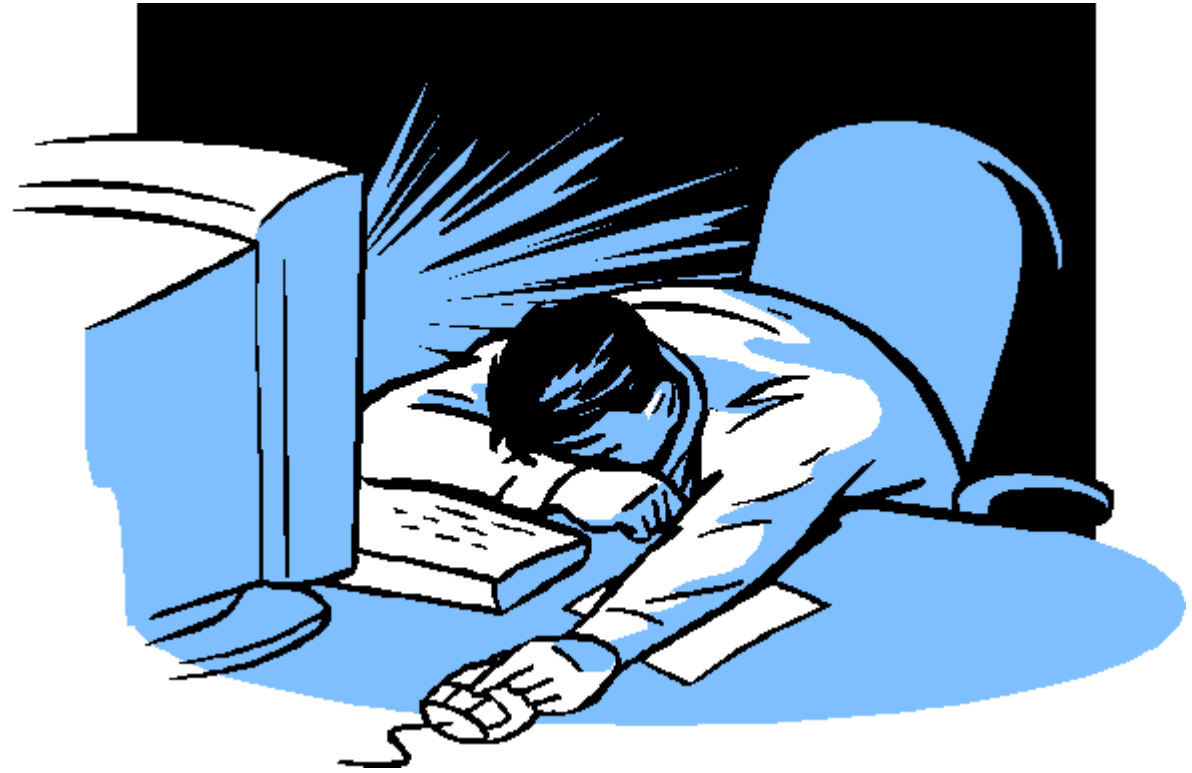
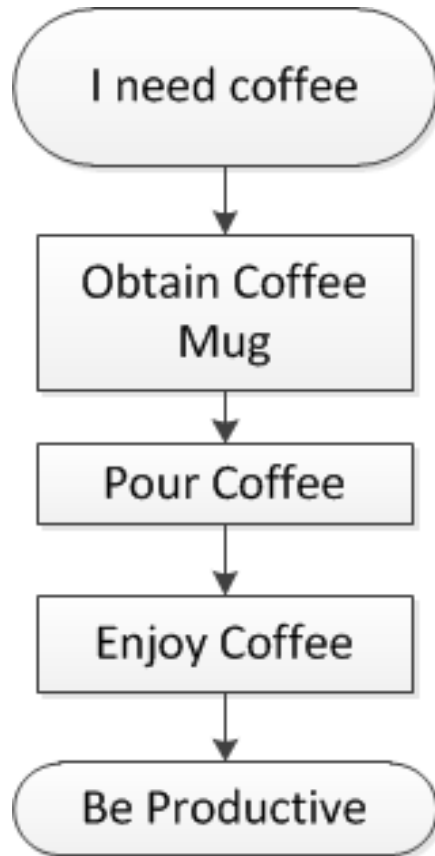
1. Due diligence
2. Improve the process
3. Translate to Laserfiche
4. Effective method of documentation



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)

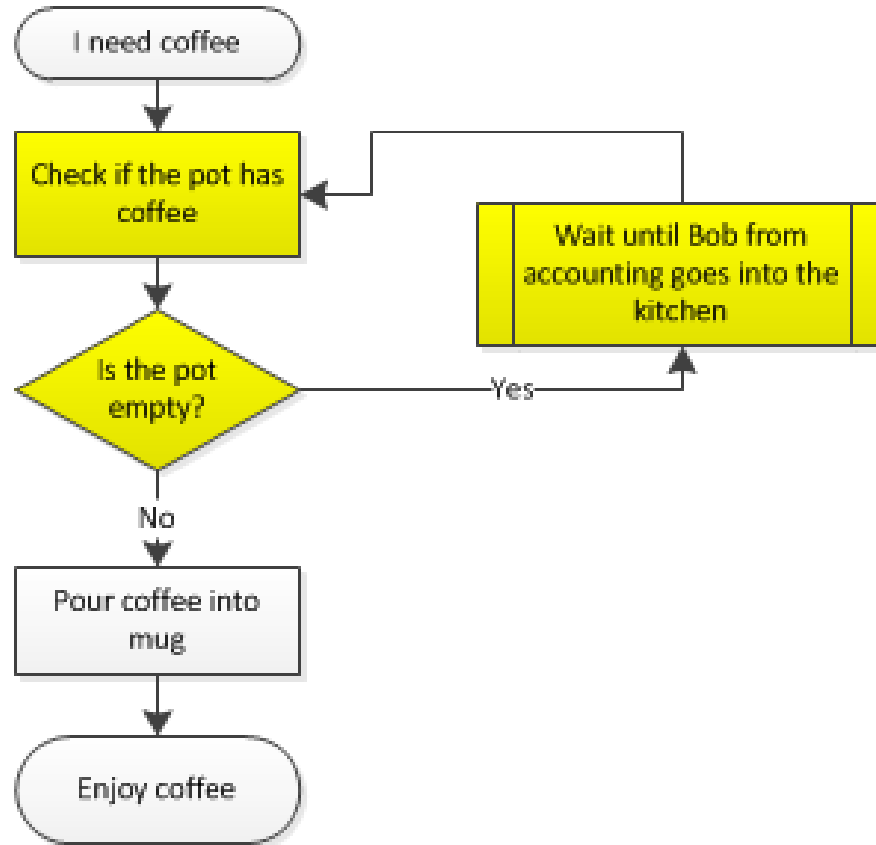
- Big picture
- Identify core requirements
- Identify nice to haves
- Identify limitations

How? Step 3 – Diagram Process

Add details to your last diagram

- Information obtained in interviews

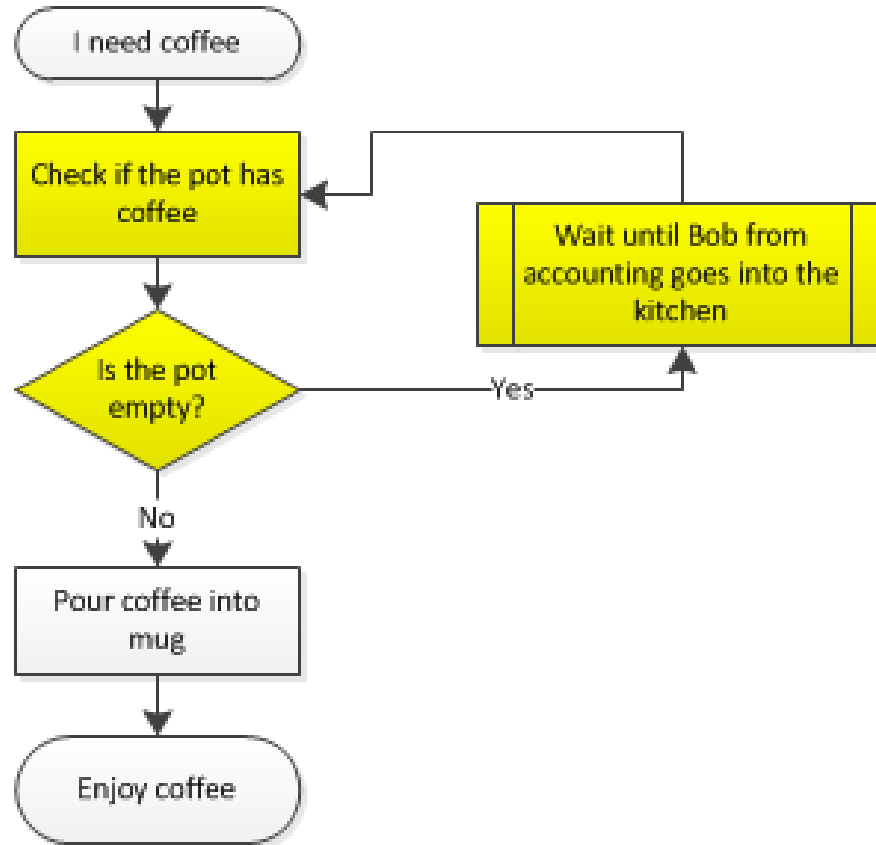
How? Step 3 – Diagram Process



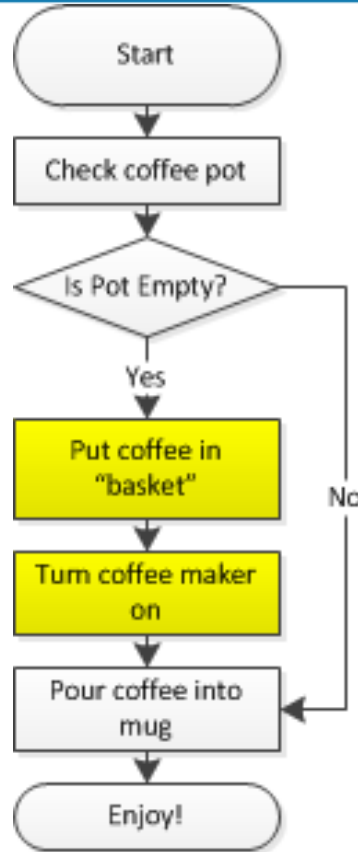
How? Step 4 – Analysis

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

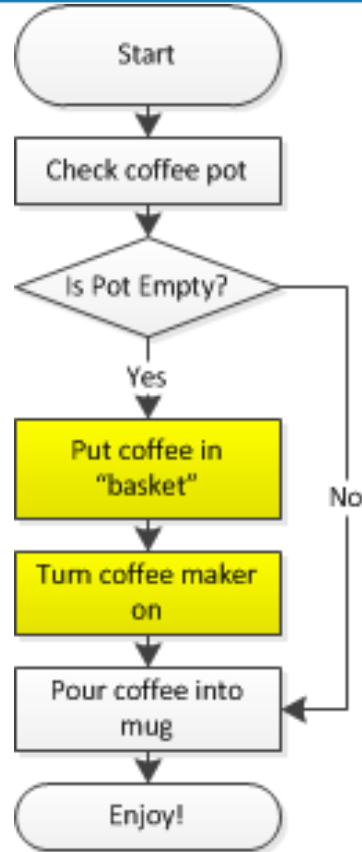
How - Analysis



How? - Diagram Process



How? - Analysis



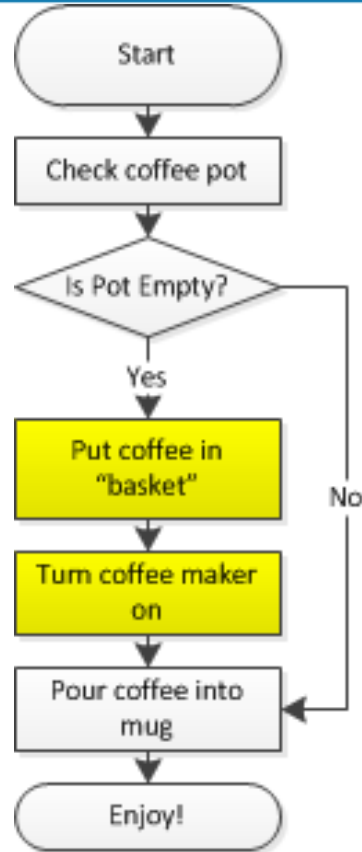
Pro Tip

Visualize the process!

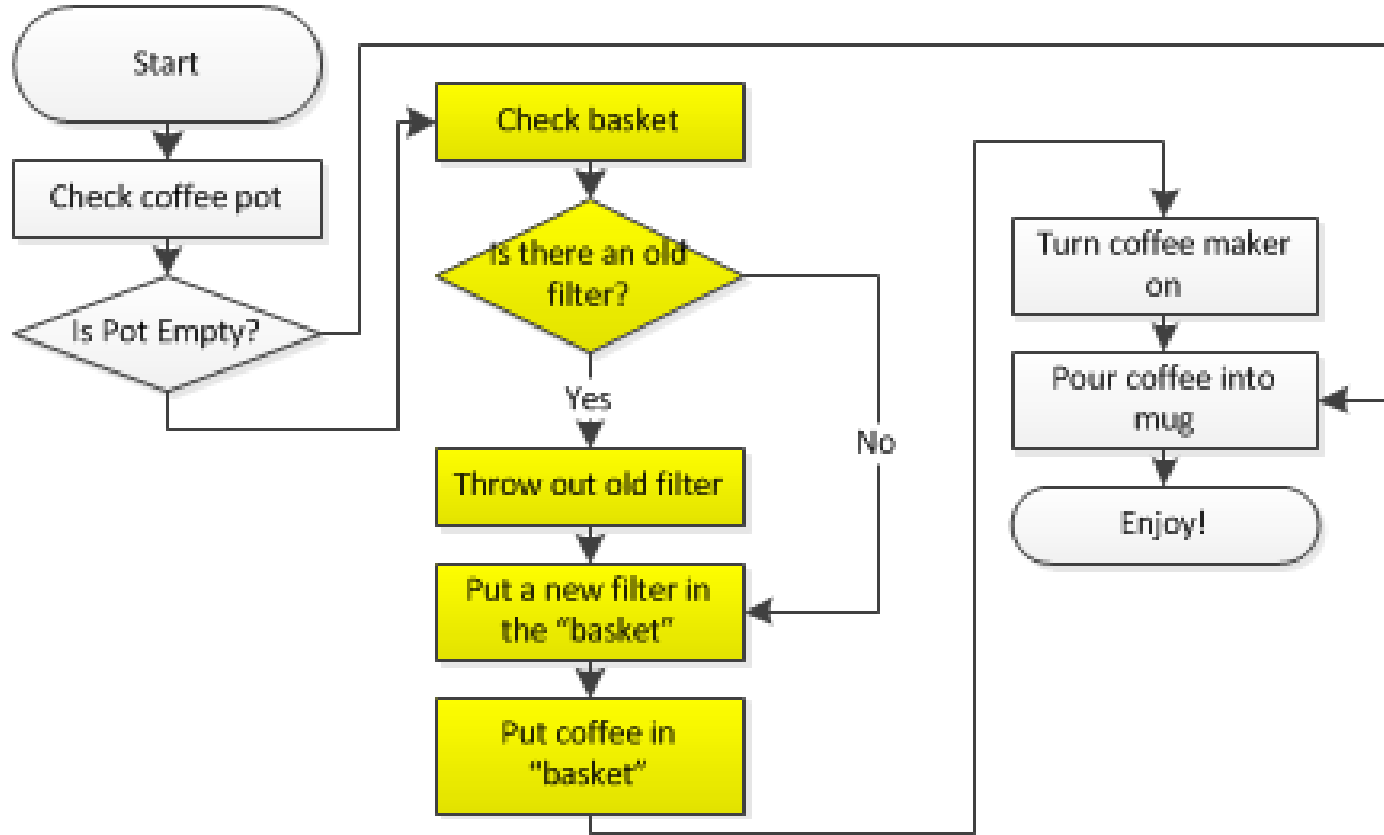
How? – Analysis



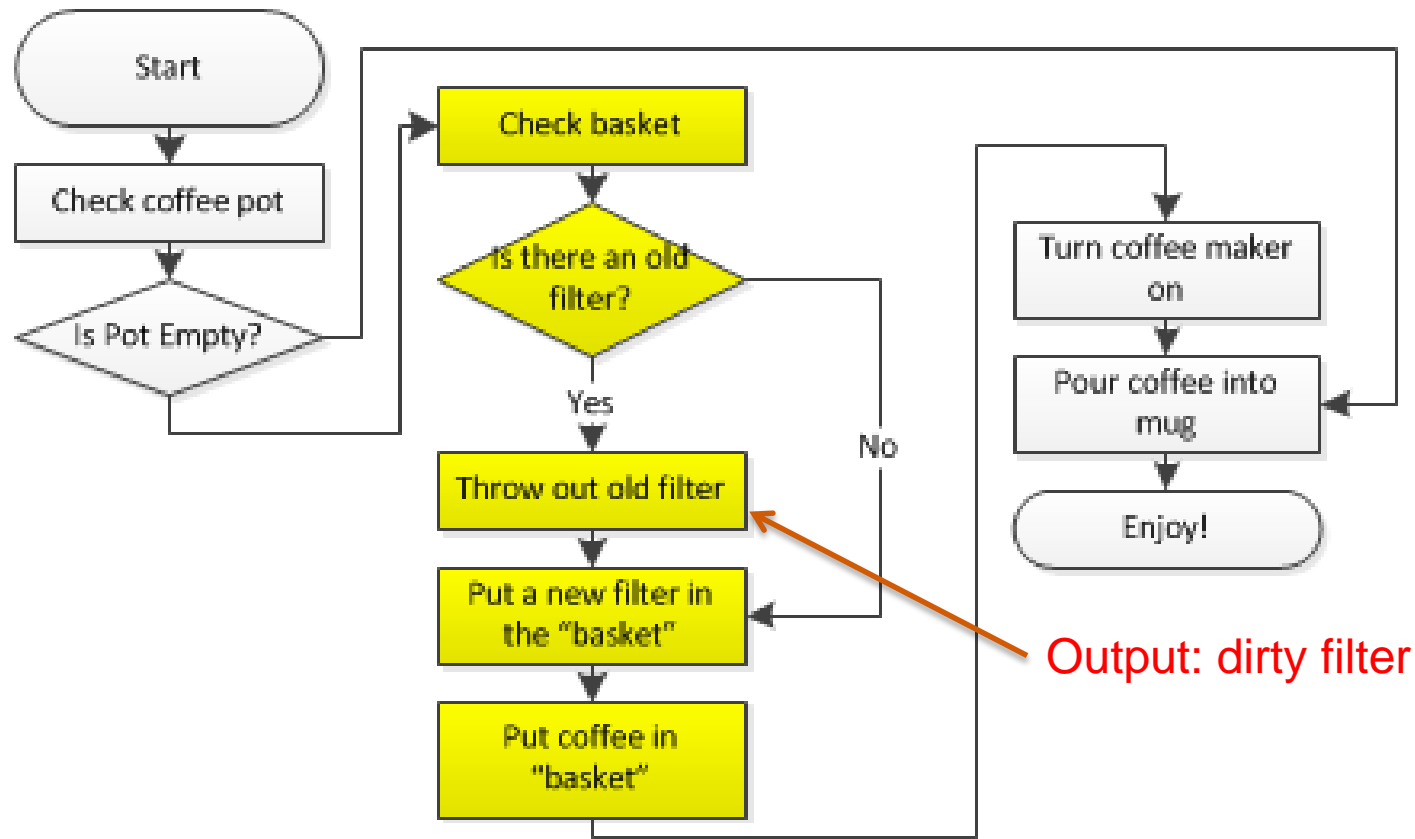
How? - Analysis



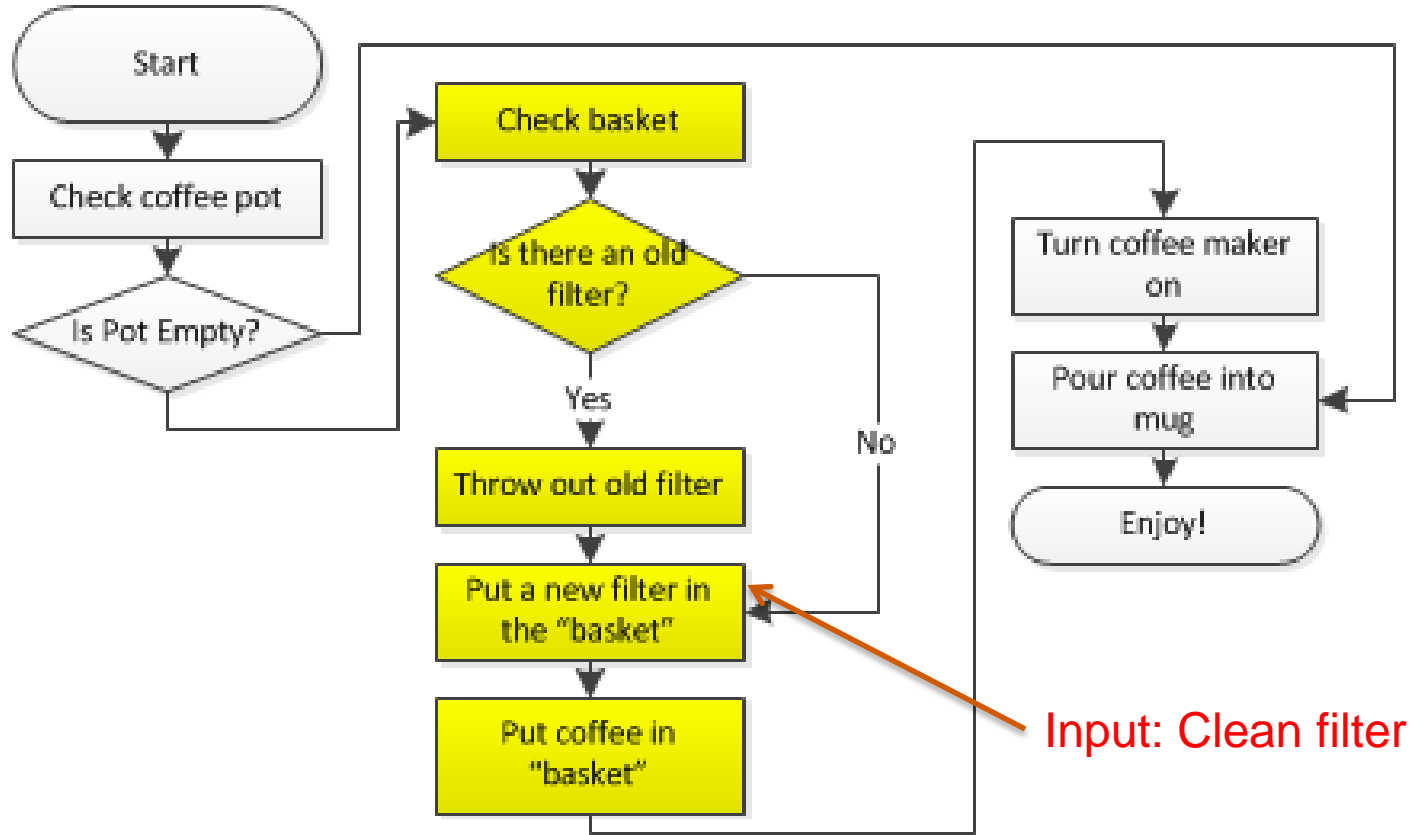
How? – Analysis > Diagram Process



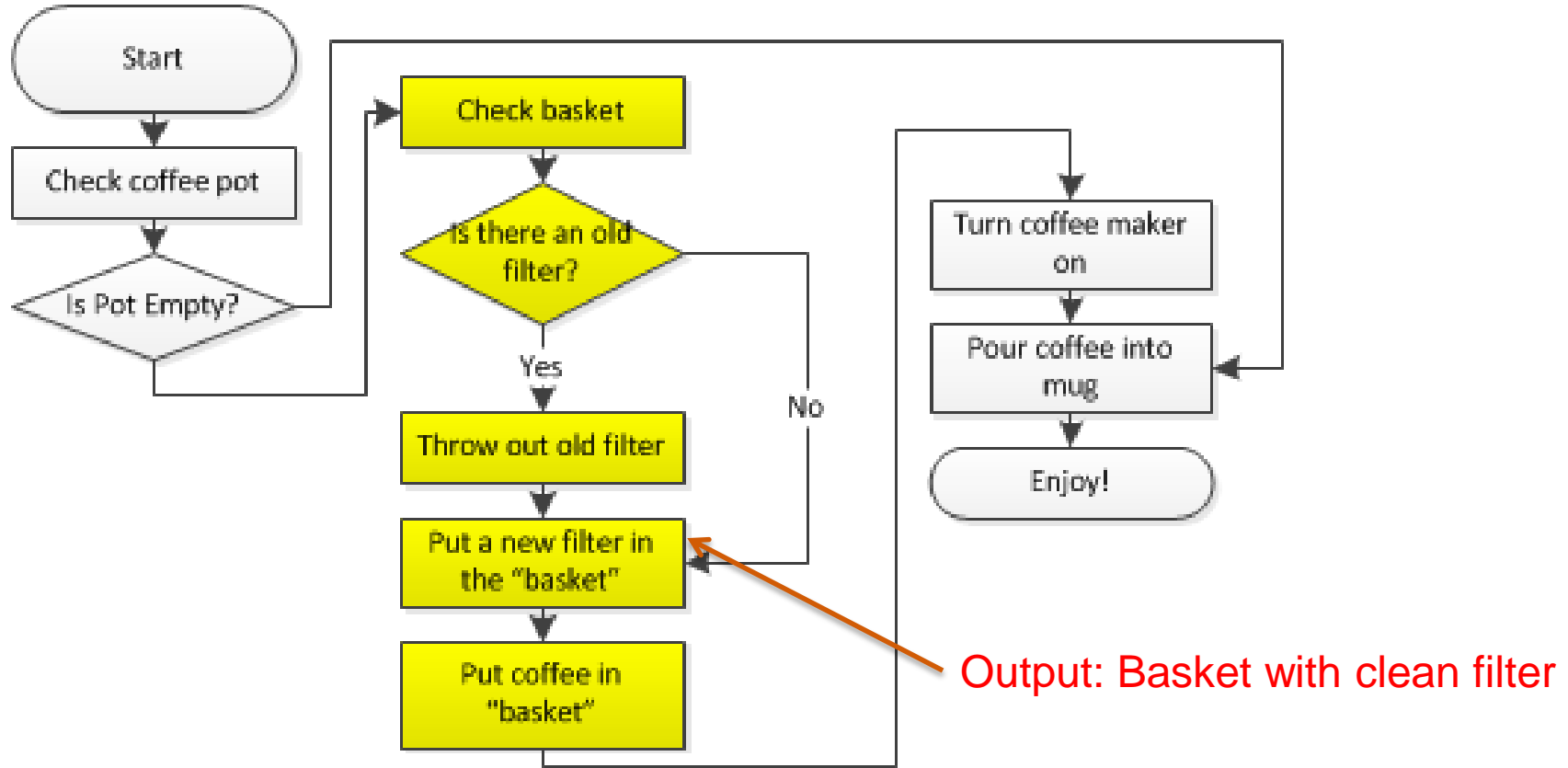
How? – Analysis > Diagram Process



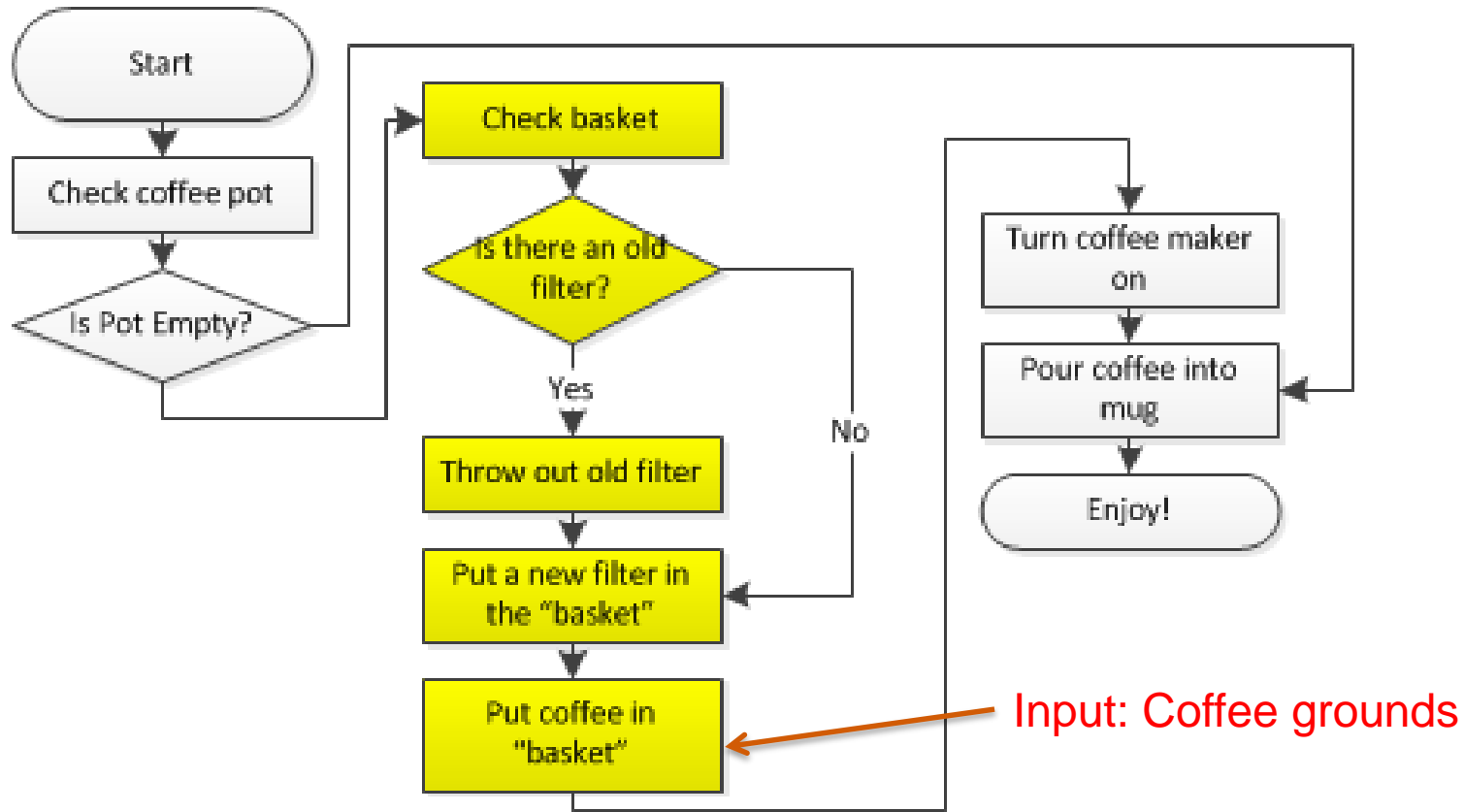
How? – Analysis > Diagram Process



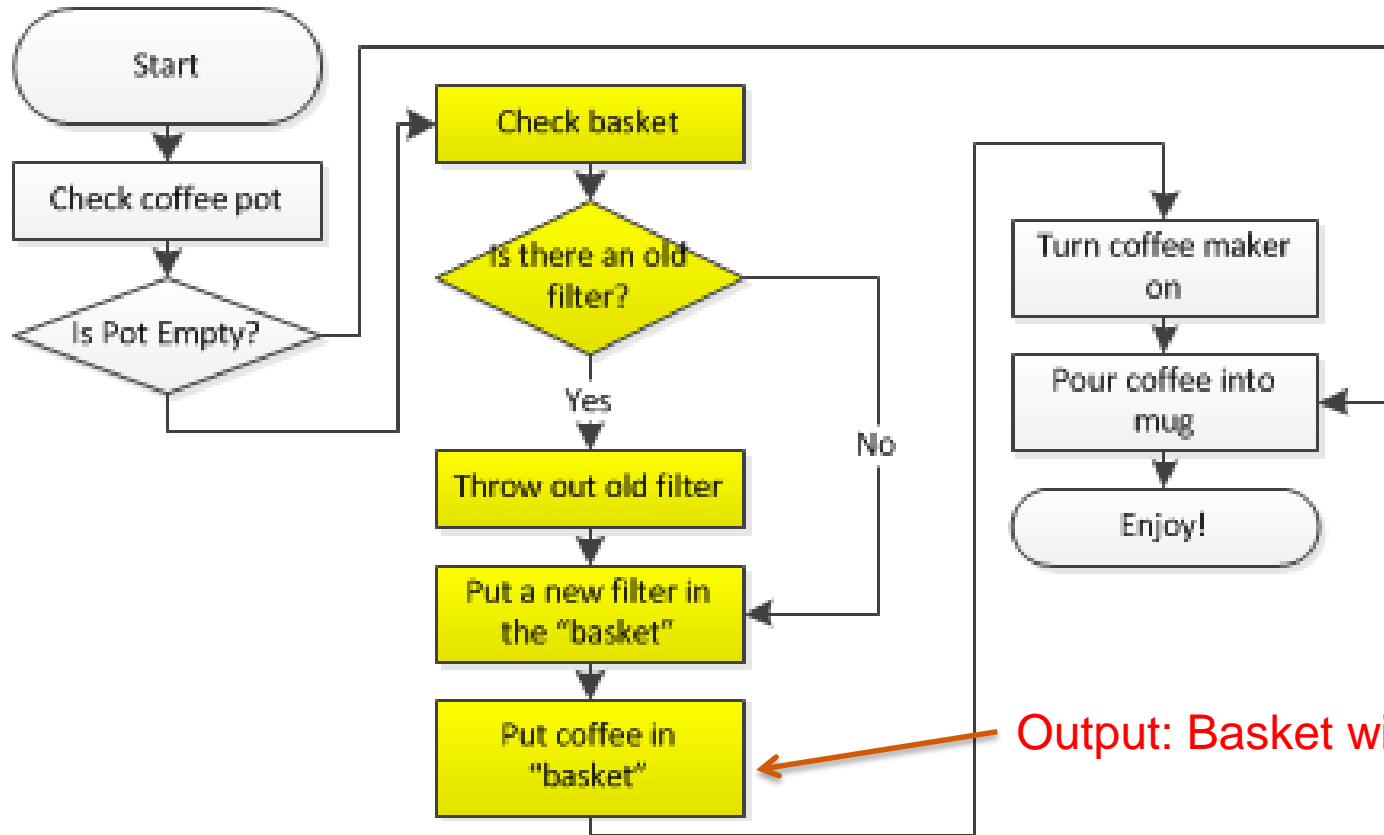
How? – Analysis > Diagram Process



How? – Analysis > Diagram Process

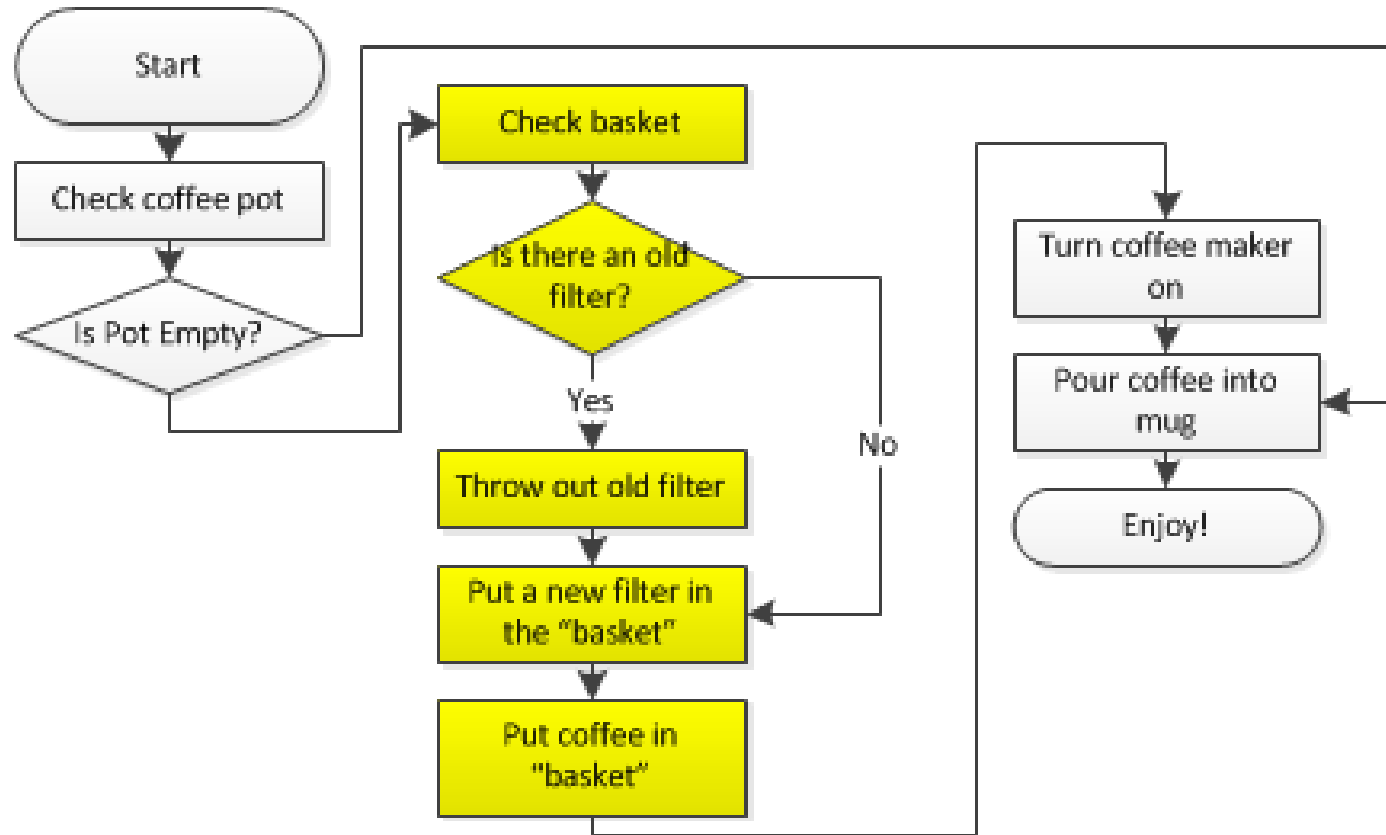


How? – Analysis > Diagram Process



Output: Basket with fresh grounds

How? – Analysis



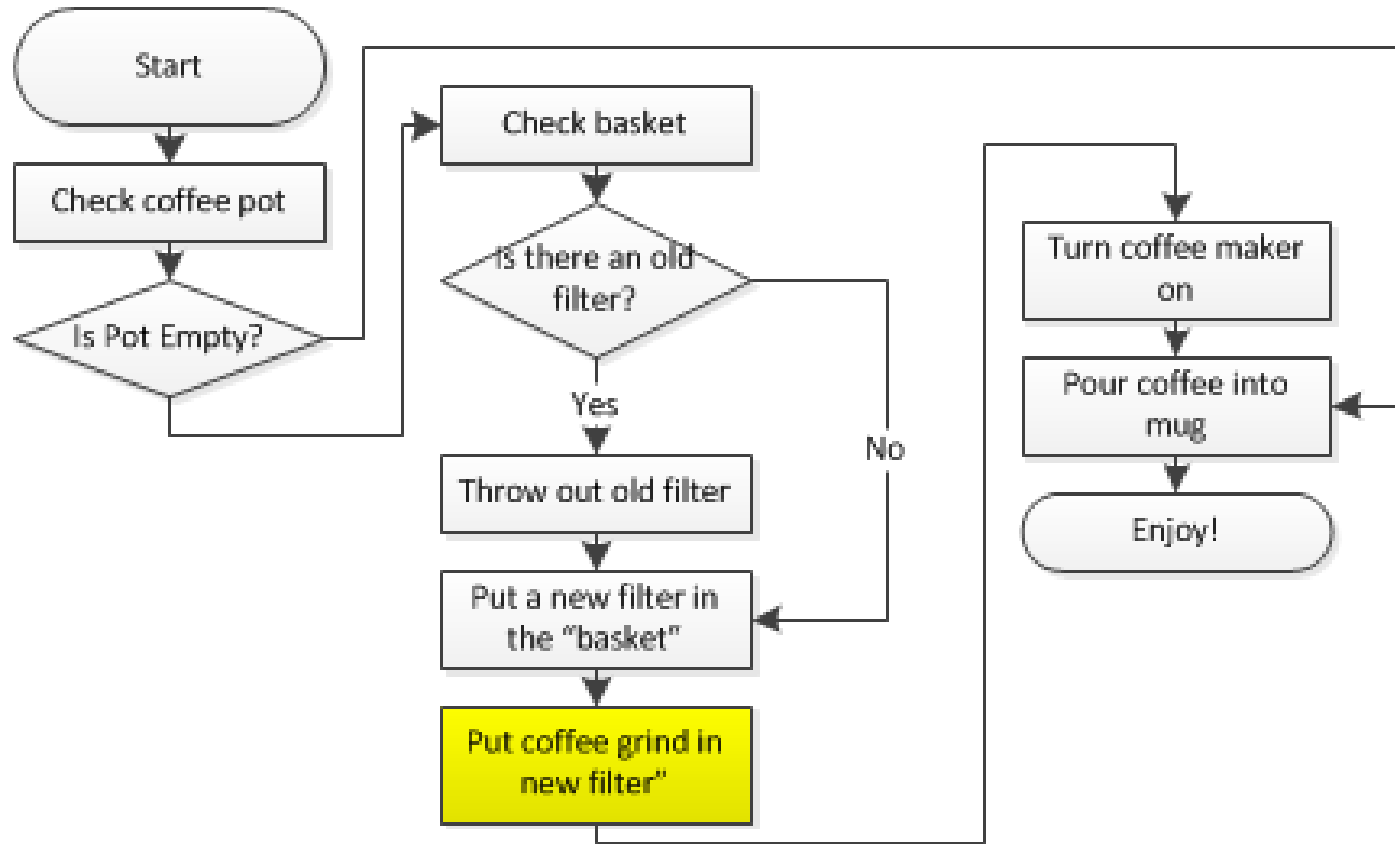
How? – Analysis



Pro Tip

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

How? – Analysis > Diagram Process



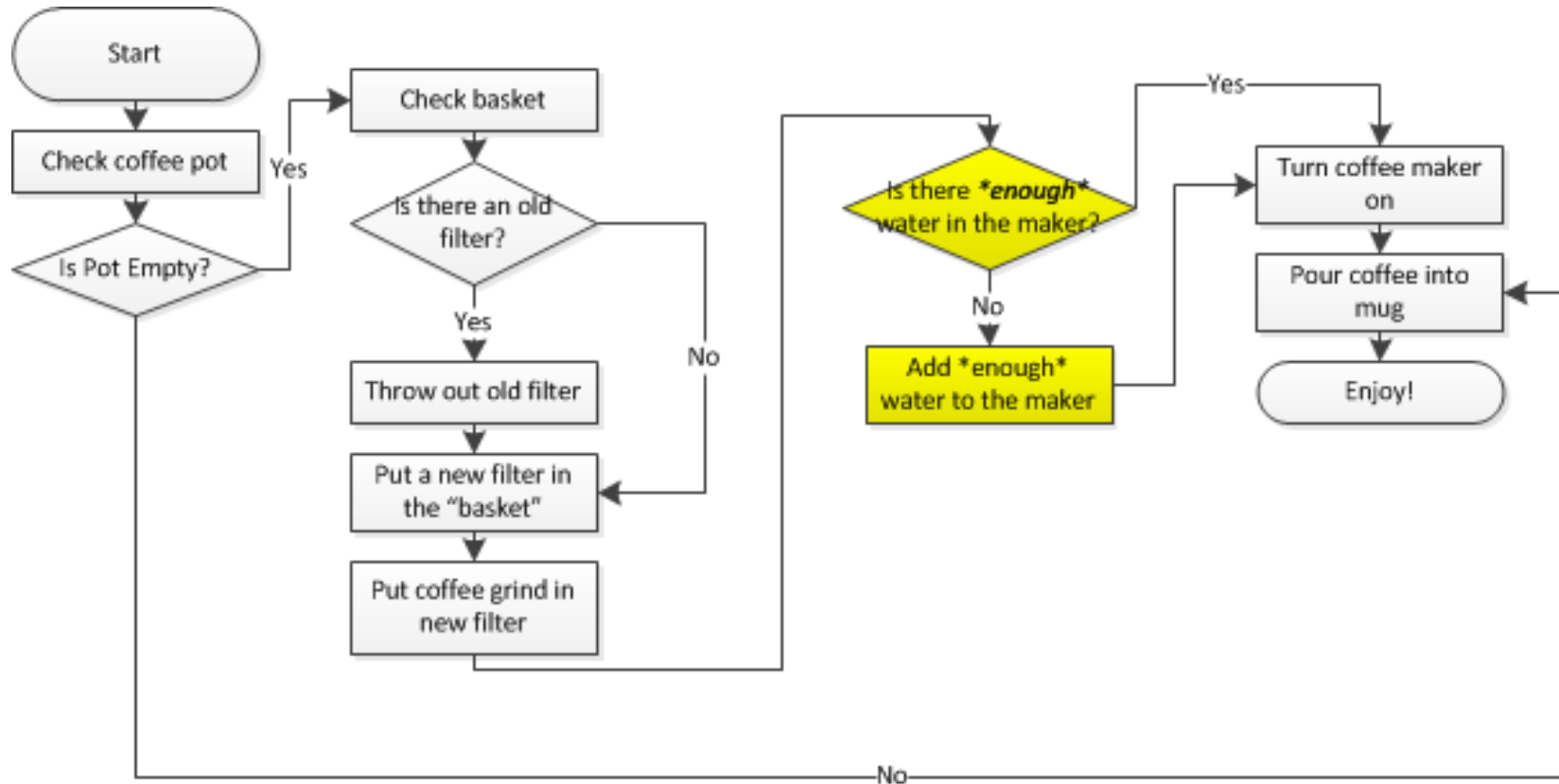
How? – Analysis



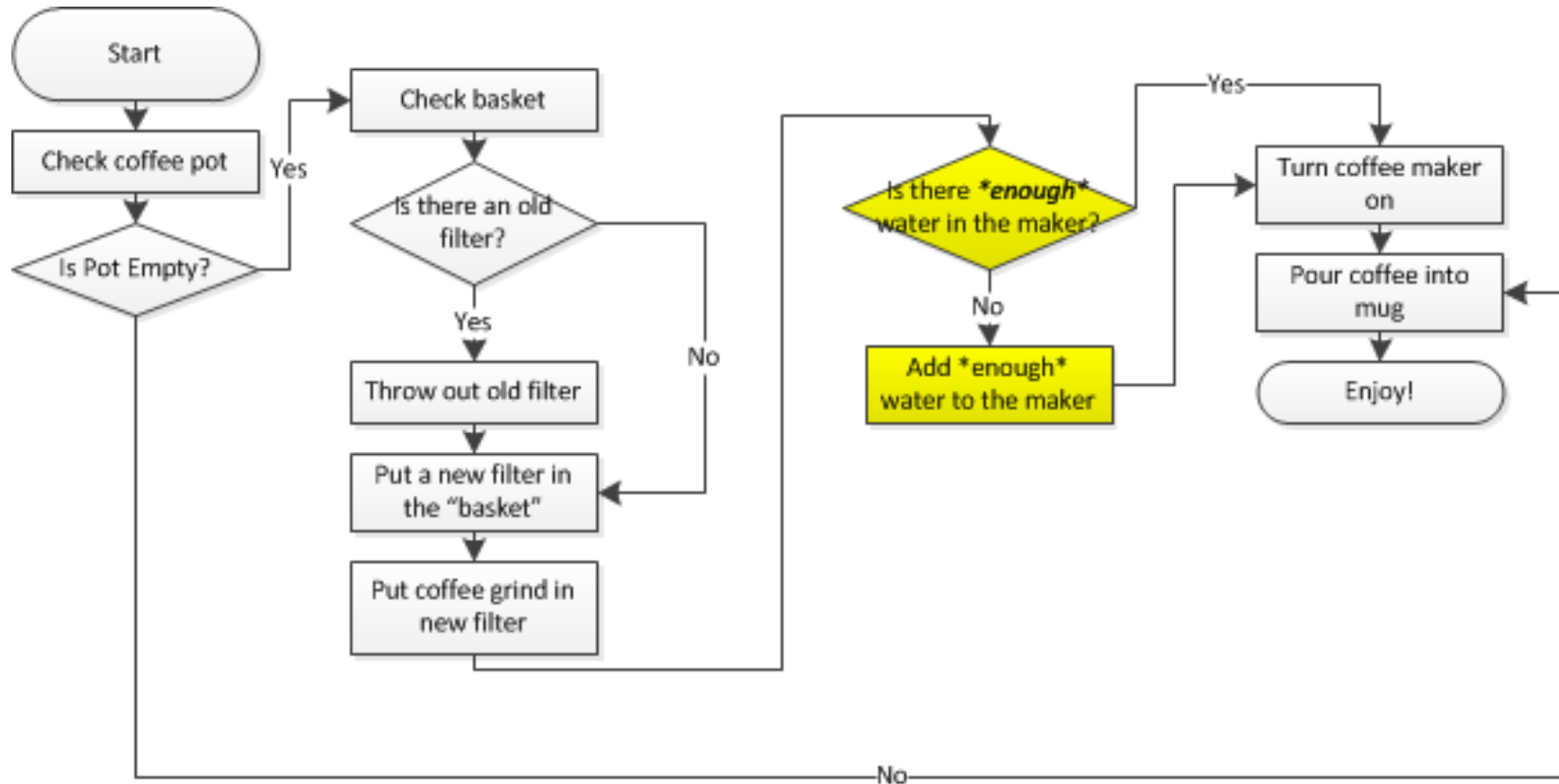
Pro Tip

Don't make any assumptions

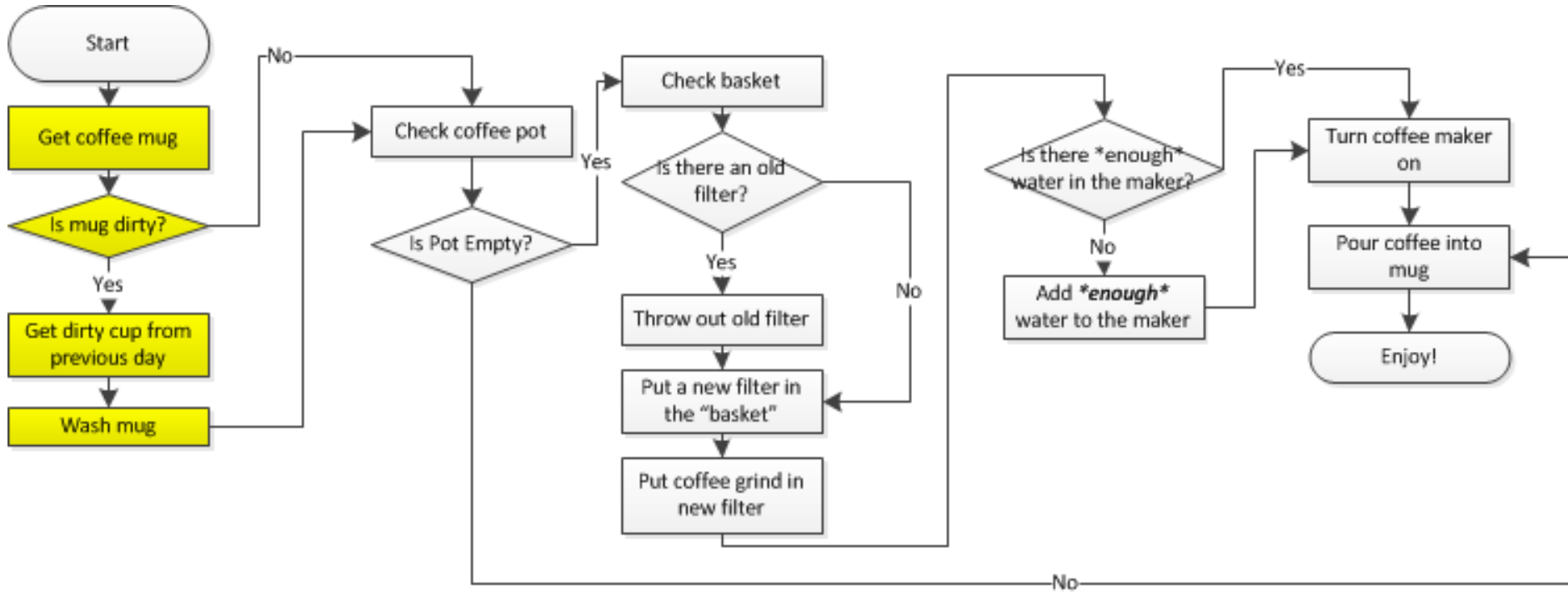
How? – Analysis > Diagram Process



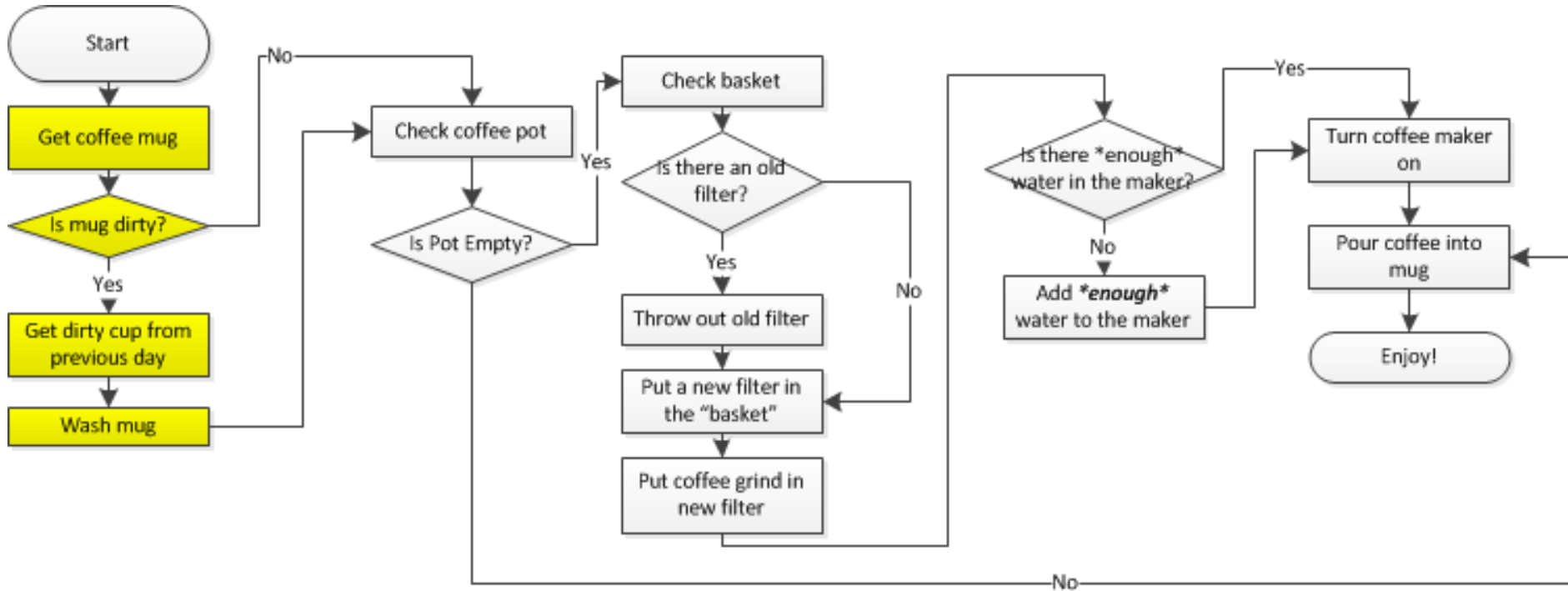
How? – Analysis



How? – Analysis > Diagram Process



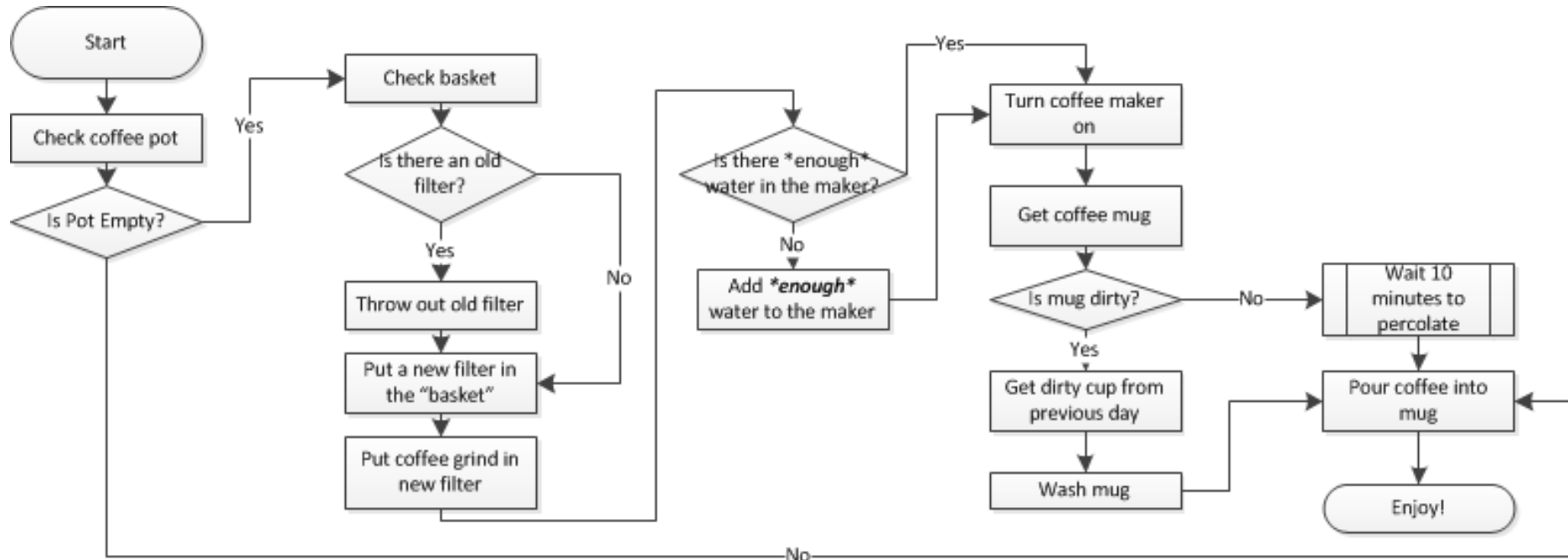
How? – Analysis




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?

Workflow: What is it?



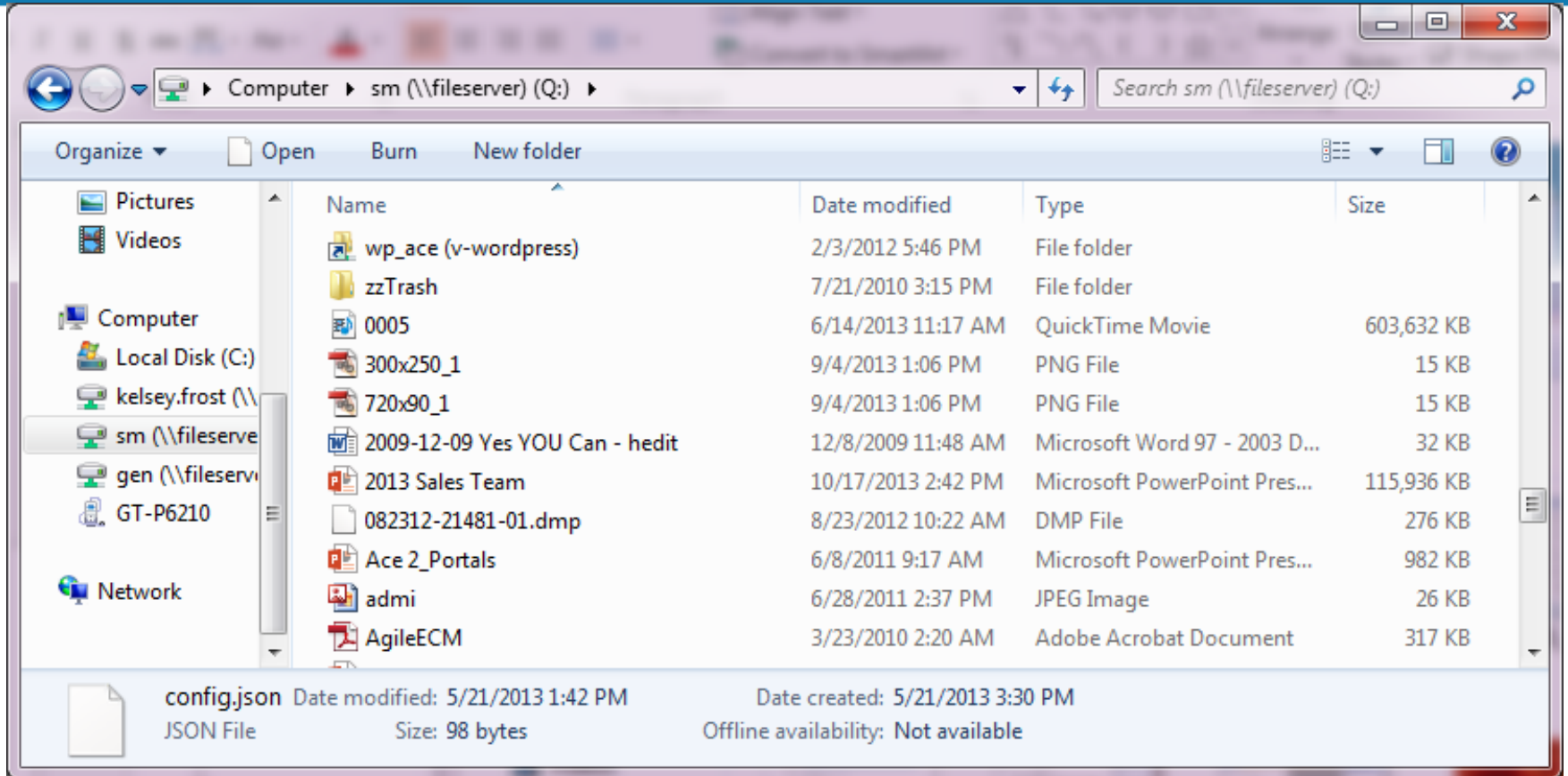
- ▶ An automation tool
 - Precise
 - Tireless
 - Lightning-quick
- ▶ Your virtual personal assistant

Workflow: What is it good for?

Workflow: What is it good for?



Workflow: What is it good for?



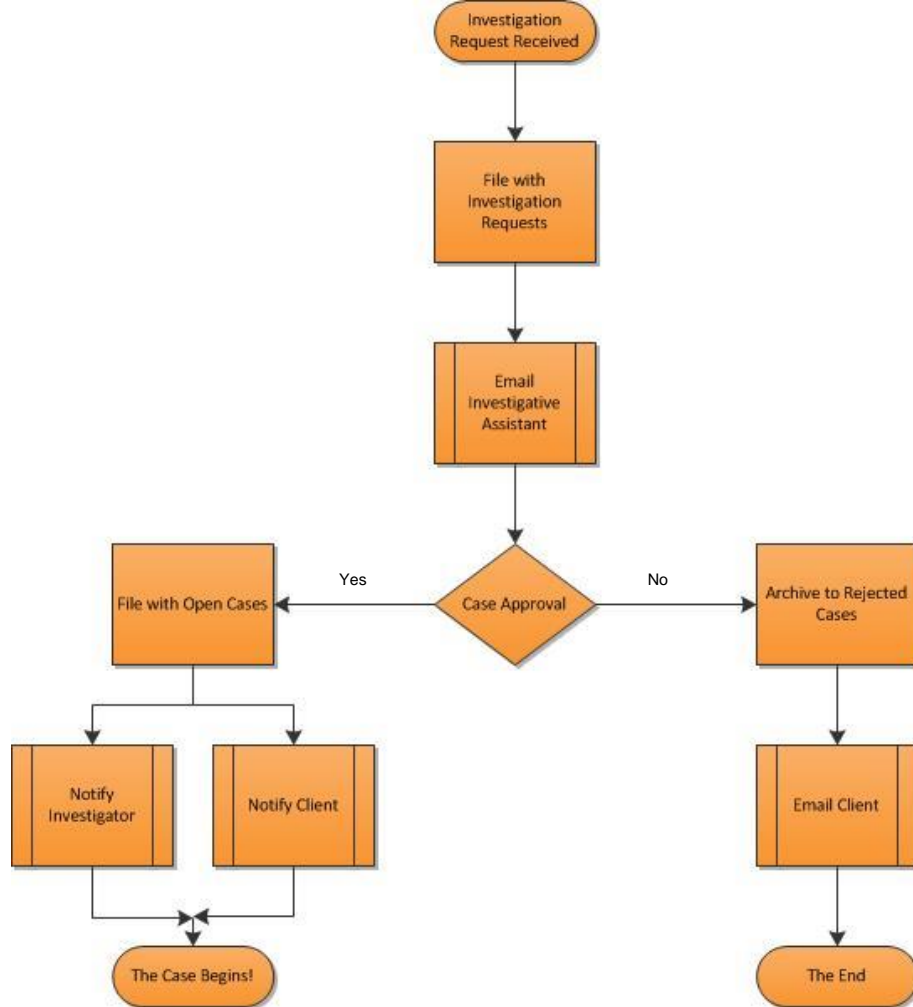
The screenshot shows a Windows Explorer window with the address bar set to "Computer > sm (\\fileserver) (Q:)". The left sidebar shows the navigation pane with "sm (\\fileserver)" selected. The main pane displays a list of files and folders in a table format.

| Name | Date modified | Type | Size |
|--------------------------------|--------------------|-------------------------------|------------|
| wp_ace (v-wordpress) | 2/3/2012 5:46 PM | File folder | |
| zzTrash | 7/21/2010 3:15 PM | File folder | |
| 0005 | 6/14/2013 11:17 AM | QuickTime Movie | 603,632 KB |
| 300x250_1 | 9/4/2013 1:06 PM | PNG File | 15 KB |
| 720x90_1 | 9/4/2013 1:06 PM | PNG File | 15 KB |
| 2009-12-09 Yes YOU Can - hedit | 12/8/2009 11:48 AM | Microsoft Word 97 - 2003 D... | 32 KB |
| 2013 Sales Team | 10/17/2013 2:42 PM | Microsoft PowerPoint Pres... | 115,936 KB |
| 082312-21481-01.dmp | 8/23/2012 10:22 AM | DMP File | 276 KB |
| Ace 2_Portals | 6/8/2011 9:17 AM | Microsoft PowerPoint Pres... | 982 KB |
| admi | 6/28/2011 2:37 PM | JPEG Image | 26 KB |
| AgileECM | 3/23/2010 2:20 AM | Adobe Acrobat Document | 317 KB |

At the bottom of the window, a status bar shows details for a selected file:

- File: config.json
- Date modified: 5/21/2013 1:42 PM
- Date created: 5/21/2013 3:30 PM
- Size: 98 bytes
- Offline availability: Not available

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