Getting Started with Workflow

Caroline Hsu
Presales Engineer, Laserfiche
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

1. Lamp doesn't work
   - If No: Lamp plugged in?
     - If No: Plug in lamp
     - If Yes: Yes
   - If Yes: Bulb burned out?
     - If Yes: Replace bulb
     - If No: No
       - Repair lamp
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?

I need coffee

Obtain Coffee Mug

Pour Coffee

Enjoy Coffee

Be Productive
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

I need coffee

Obtain Coffee Mug

Pour Coffee

Enjoy Coffee

Be Productive
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

1. I need coffee
2. Check if the pot has coffee
3. Is the pot empty?
   - No: Pour coffee into mug
   - Yes: Wait until Bob from accounting goes into the kitchen
4. Enjoy coffee
How? Step 4 – Analysis

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

I need coffee

Check if the pot has coffee

Is the pot empty?

No

Pour coffee into mug

Enjoy coffee

Yes

Wait until Bob from accounting goes into the kitchen
How? - Diagram Process

1. Start
2. Check coffee pot
3. Is Pot Empty?
   - Yes: Put coffee in "basket"
   - No: Turn coffee maker on
     - Yes: Pour coffee into mug
     - No: Enjoy!
How? - Analysis

Start

Check coffee pot

Is Pot Empty?

Yes

Put coffee in "basket"

No

Turn coffee maker on

Pour coffee into mug

Enjoy!
Pro Tip

Visualize the process!
How? – Analysis > Diagram Process

1. Start
2. Check coffee pot
3. Check basket
4. Is there an old filter?
   - Yes: Throw out old filter
   - No: Put a new filter in the “basket”
5. Put coffee in “basket”
6. Turn coffee maker on
7. Pour coffee into mug
8. Enjoy!
How? – Analysis > Diagram Process

Output: dirty filter
How? – Analysis > Diagram Process

Input: Clean filter
How? – Analysis > Diagram Process

Output: Basket with clean filter
Input: Coffee grounds
How? – Analysis > Diagram Process

Start

Check coffee pot

Is Pot Empty?

Check basket

Is there an old filter?

Yes

Throw out old filter

Put a new filter in the “basket”

Put coffee in “basket”

No

Turn coffee maker on

Pour coffee into mug

Enjoy!

Output: Basket with fresh grounds
How? – Analysis

Start

Check coffee pot

Is Pot Empty?

Check basket

Is there an old filter?

Yes

Throw out old filter

Put a new filter in the “basket”

Put coffee in “basket”

No

Turn coffee maker on

Pour coffee into mug

Enjoy!
How? – Analysis
Pro Tip

1. Be specific, unambiguous
2. Use clearly defined terminology
How? – Analysis
Pro Tip

Don’t make any assumptions
How? – Analysis > Diagram Process

1. Start
2. Check coffee pot
3. Is Pot Empty?
   - Yes: Check basket
   - No: Is there an old filter?
     - Yes: Throw out old filter, Put a new filter in the “basket”, Put coffee grind in new filter
     - No: Add *enough* water to the maker
4. Is there *enough* water in the maker?
   - Yes: Turn coffee maker on
   - No: Pour coffee into mug
5. Enjoy!
How? – Analysis

Start

Check coffee pot

Is Pot Empty?

Check basket

Is there an old filter?

Yes

Throw out old filter

Put a new filter in the “basket”

Put coffee grind in new filter

No

Is there *enough* water in the maker?

Yes

Turn coffee maker on

Pour coffee into mug

Enjoy!

No

Add *enough* water to the maker

#EMPOWER15
How? – Analysis > Diagram Process

Start

- Get coffee mug
  - Is mug dirty?
    - Yes: Get dirty cup from previous day
    - No: Check coffee pot
      - Is Pot Empty?
        - Yes: Check basket
          - Is there an old filter?
            - Yes: Throw out old filter
            - No: Add *enough* water to the maker
          - No: Put a new filter in the "basket"
          - Put coffee grind in new filter
          - Put coffee grind in new filter
        - No: Turn coffee maker on
          - Yes: Pour coffee into mug
          - Enjoy!
      - No: Is there *enough* water in the maker?
        - Yes: Put coffee grind in new filter
        - No: Add *enough* water to the maker
    - No: Wash mug
### How? – Interview Questions

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. What is the overall goal of the process?</td>
<td>7. How often does this process occur?</td>
</tr>
<tr>
<td>2. What triggers the start of the process?</td>
<td>8. Decision Outcomes</td>
</tr>
<tr>
<td>3. What signals the end?</td>
<td>1. Success</td>
</tr>
<tr>
<td>4. What determines the start and end of each step?</td>
<td>2. Failure</td>
</tr>
<tr>
<td>5. Who is involved in each step?</td>
<td>3. Outlier scenarios – What if?</td>
</tr>
<tr>
<td>6. Are there any alternative routes in the process?</td>
<td>4. Deadlines</td>
</tr>
<tr>
<td></td>
<td>Assumptions? Consult with project owner.</td>
</tr>
</tbody>
</table>
Translating to Laserfiche

Start

Check coffee pot

Is Pot Empty?

Yes

Check basket

Is there an old filter?

Yes

Throw out old filter

Put a new filter in the “basket”

Put coffee grind in new filter

No

No

Is there *enough* water in the maker?

Yes

Turn coffee maker on

Get coffee mug

Is mug dirty?

No

Get dirty cup from previous day

Wash mug

No

Add *enough* water to the maker

Yes

Wait 10 minutes to percolate

Pour coffee into mug

Enjoy!
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?
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