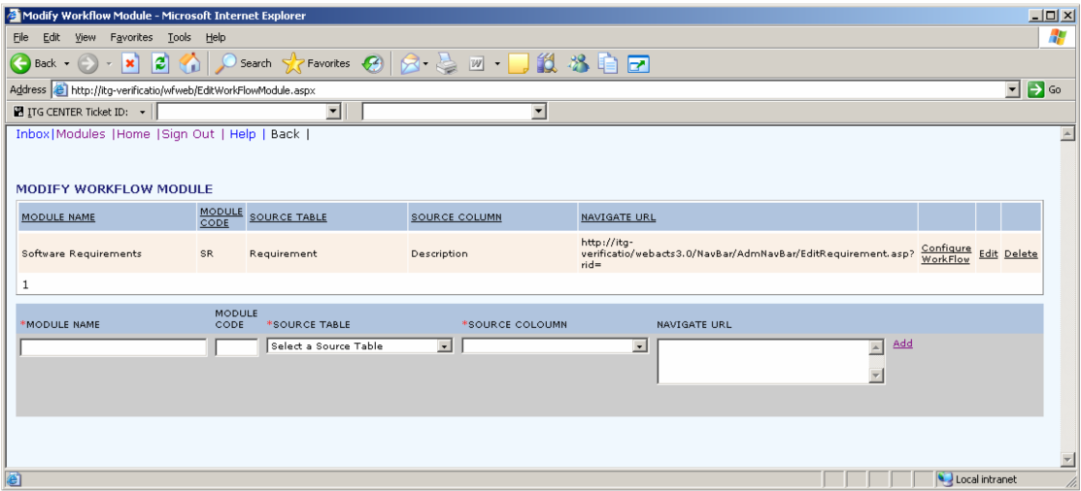
CENTRE Workflow Script

Workflow Module

From the Administrative tab in CENTRE, select Main Tables and from the ensuing screen select Workflow to view the “Edit Workflow Module” screen as illustrated below.



A workflow module provides the framework upon which workflows can be created for a specific area in CENTRE. A workflow module will contain workflows which will in turn define workflow steps, workflow step notifications, workflow step actions, and workflow step action notifications.

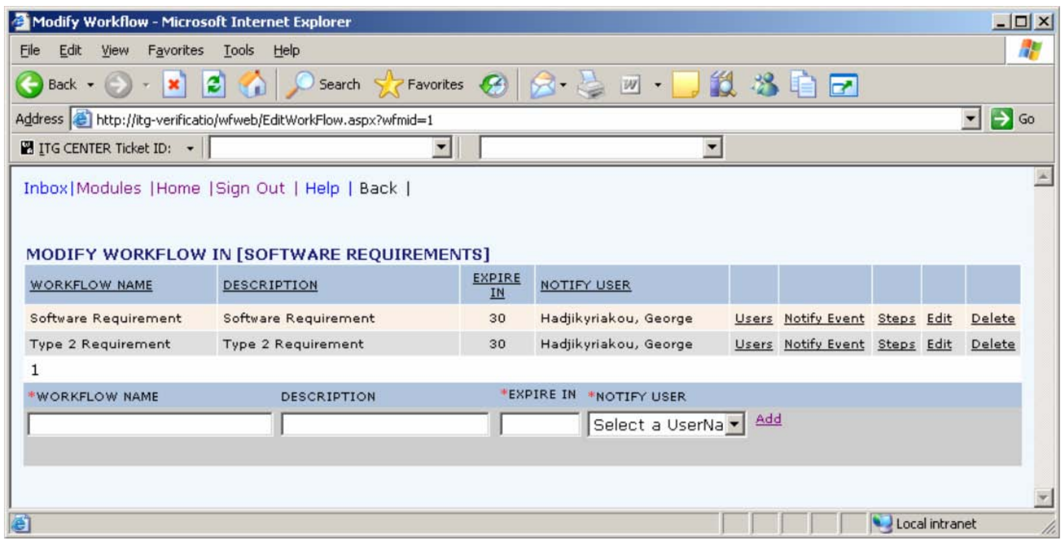
To create a new Workflow module, enter a name describing the module in the <Module Name> field, a two or three character unique string in the <Module Code> field, select a source table from the <Source Table> dropdown list for which the created workflow will be created and applied.

Defining workflows
Once the Workflow Module record is created, we can begin to define and configure one or more workflows under it.

What is a workflow? A workflow is a repeatable pattern of activity enabled by a systematic organization of resources and information flows embedded in a work process that can be documented and learned.

Currently, workflows are provided for a limited number of modules in CENTRE, but there is not reason why a workflow cannot be created and applied to any functional area of the system.

Configuration to enable the use of workflows is performed in the Administrative section of the workflow module which will only be accessible by the administrative user group.

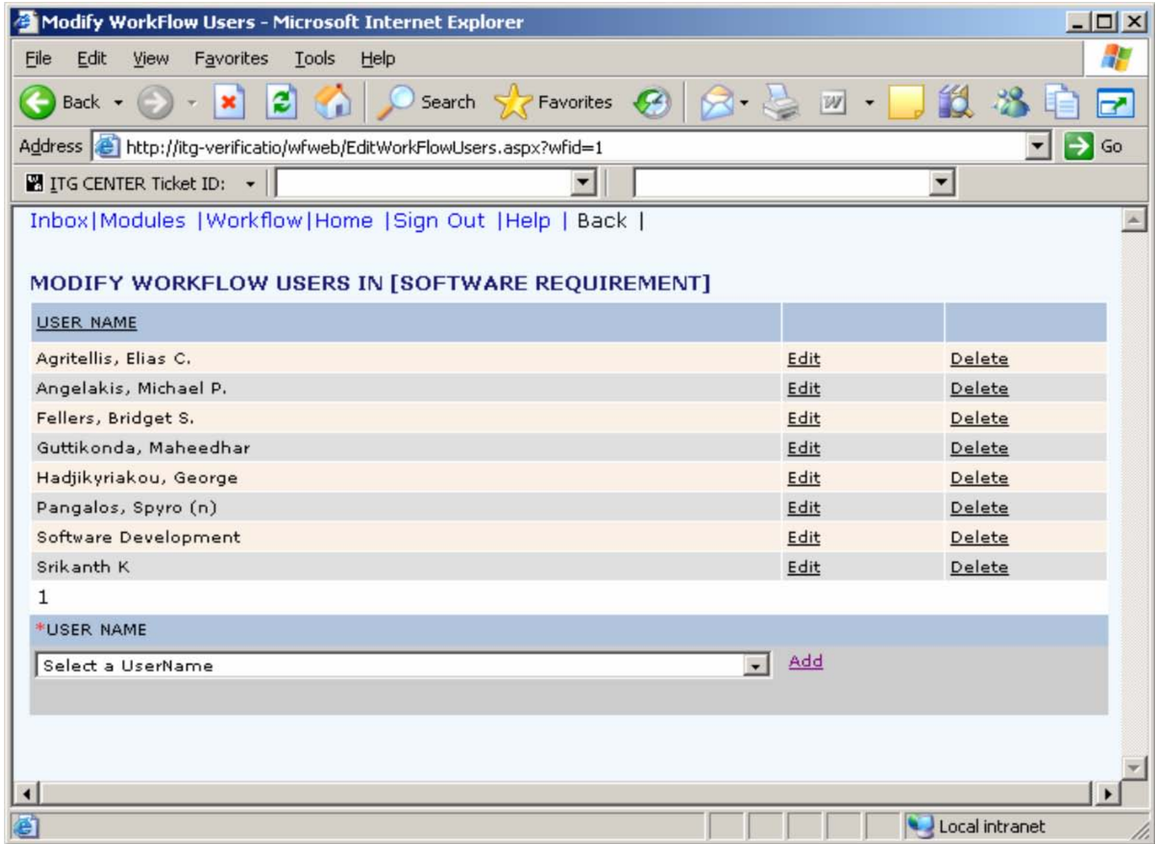


To create a new workflow, provide a unique name, a brief description of what this workflow will be applied to, and an overall expiration period in days which represents the life of a workflow once initiated. The next step is to select an individual from the list that will receive the email alert in the event that the workflow expiration time is reached without the completion of the workflow for any given record on which this workflow is initiated.

Once a workflow is created, it is now possible to assign users to it, create the steps required within the workflow, and assign individuals that will receive an email alert when the workflow changes in status.

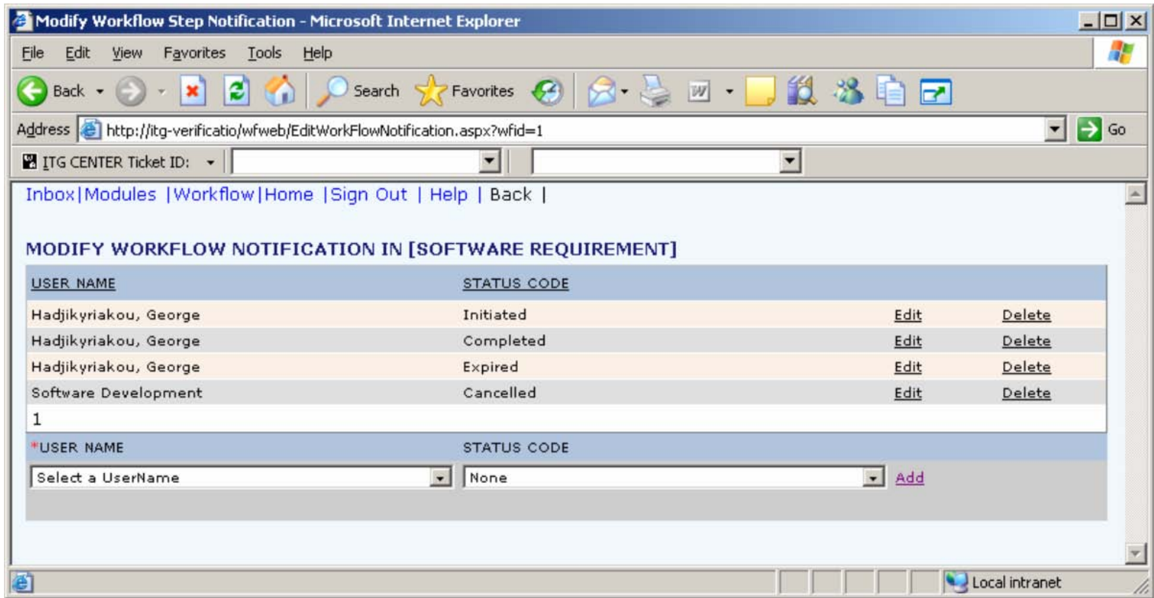
Defining workflow users

The users assigned to the workflow represent the individuals that will be able to perform one or more actions contained within each of the defined workflow steps.



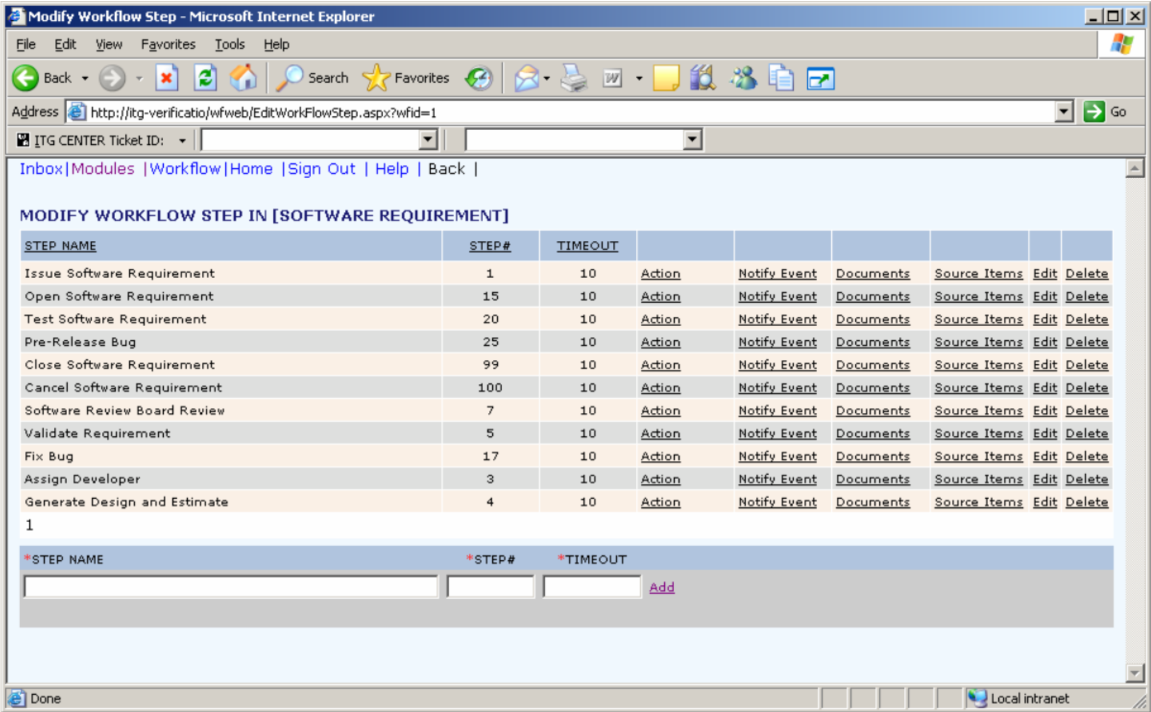
Defining workflow "Notify Events"

The workflow "Notify Events" represent programmed email alerts that are triggered by the change in status in the workflow. For each of the defined workflow events, one or more individuals can be selected as the recipients of the email alert whenever it is triggered.



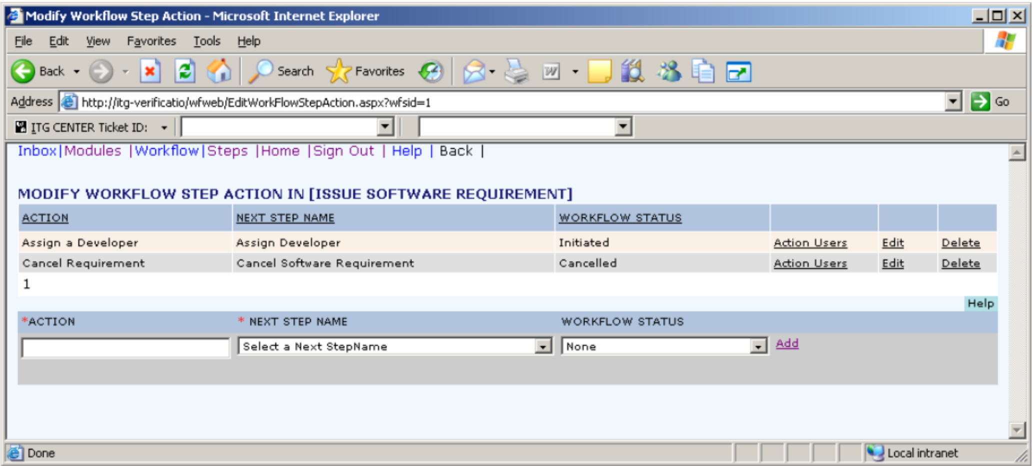
Defining workflow steps

The workflow steps represent a series of activities in the workflow. For each of the defined workflow steps a set of actions can be defined that will need to be performed in order to advance to the next step in the workflow.

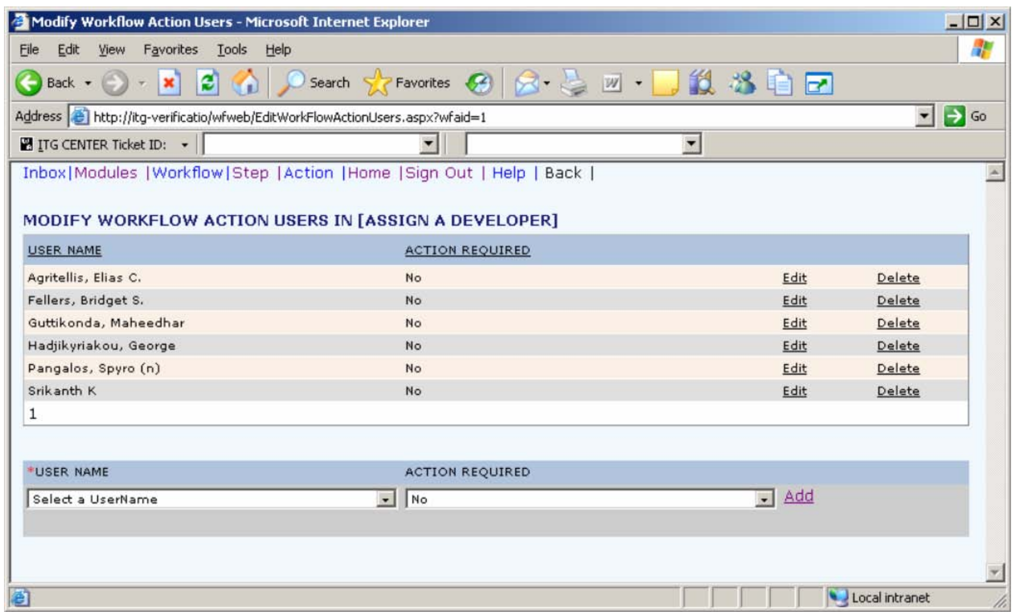


Defining workflow step actions

Step actions are a set of actions that must be performed within a workflow step that represents activity on behalf of the designated user(s) before the workflow can advance to the next step. Each defined action will indicate the workflow step that follows within the progress of the overall workflow.

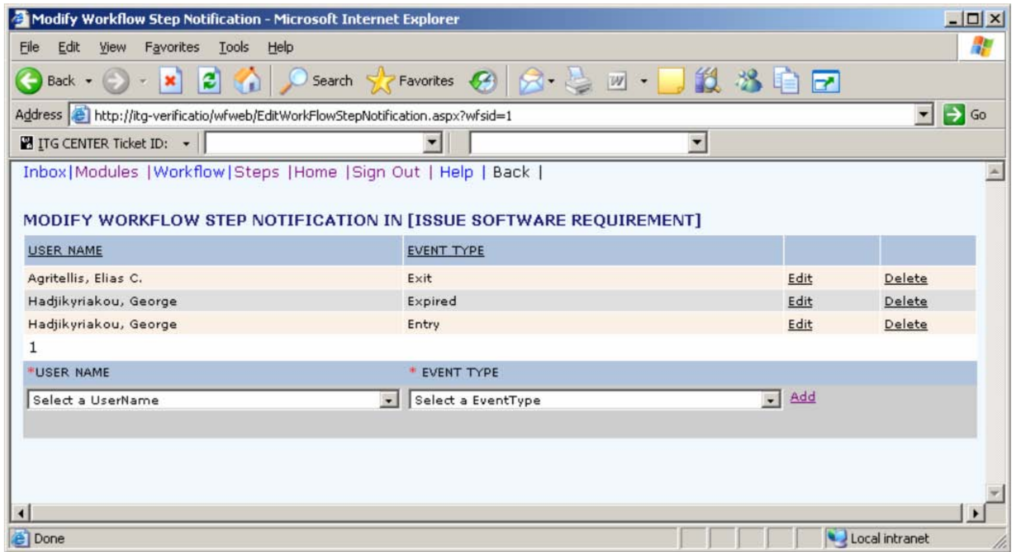


Select the “Assigned Users” link to display the “Edit Workflow Action Users” screen, where we will select the user(s) permitted to perform each of the actions.



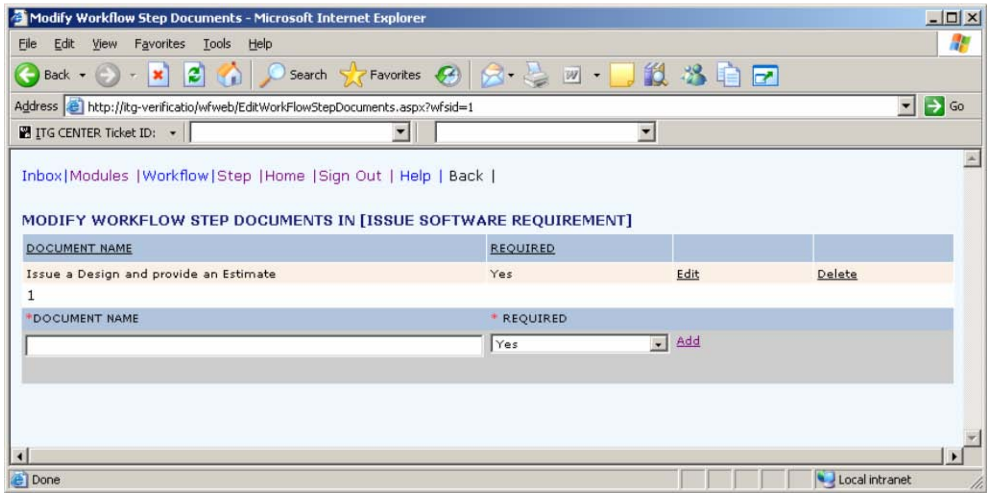
Defining workflow step “Notify Events”

The workflow step “Notify Events” represent programmed email alerts that can be configured to be triggered when entering the step and/or exiting the step. For each of the defined workflow step “Notify Events,” one or more individuals may be selected as recipients of the email alert.



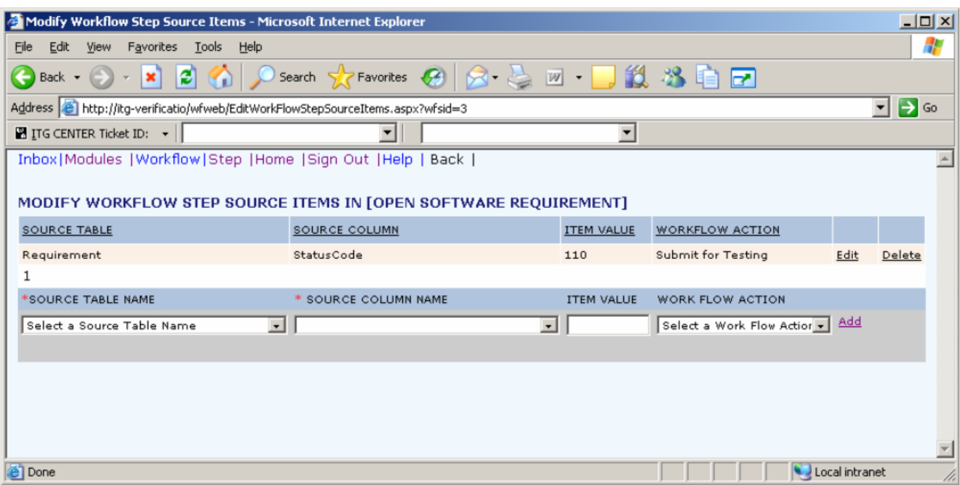
Defining Workflow Step Documents

The Workflow Step Documents represent a check list of various documents that users will need to indicate have been provided as part of the current workflow step is configured to be “Required” before permitted to advance to the next step in the workflow.



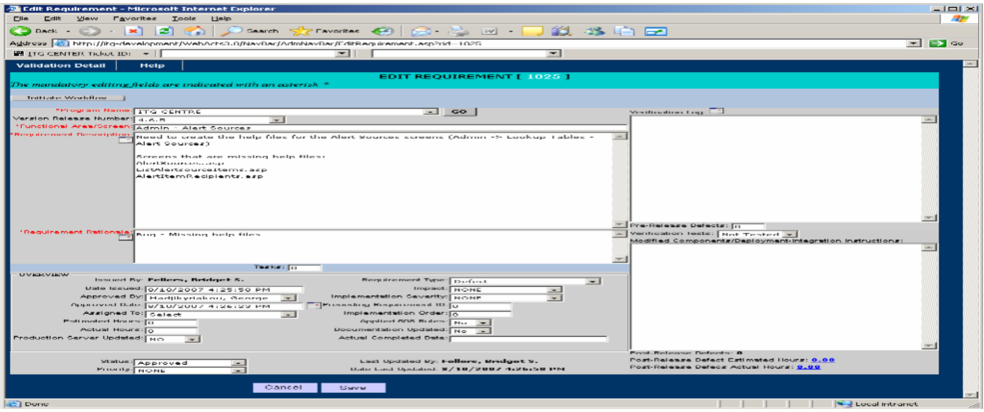
Defining workflow step source items

The workflow step “Source Items” represent an update of a selected field of the source record when transitioning from one step to another. This feature enables a change of value of a pre-selected column in the source record whenever the current step is active.

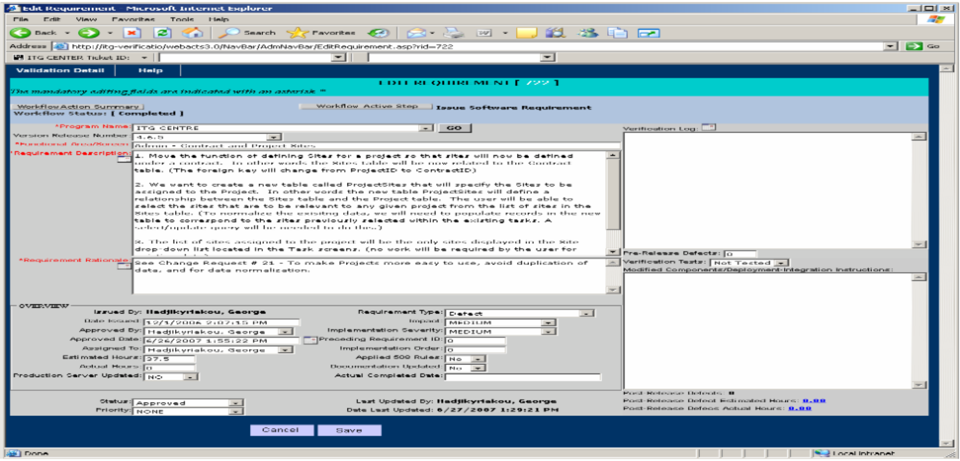


Initiating a workflow

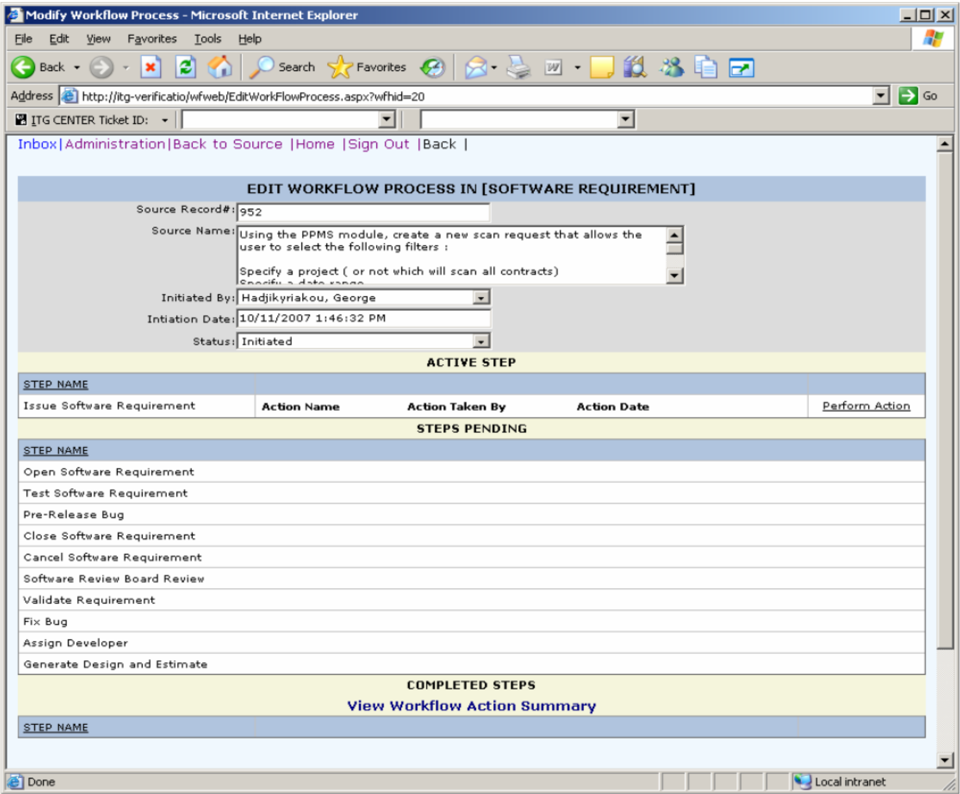
To initiate a workflow for a workflow enabled record (i.e., a software requirement, a change request, or a task record) click on the “Initiate Workflow” button located at the top of the screen.



Once a workflow has been initiated for the current record, the “Initiate Workflow” button will be replaced with a set of new buttons and indicators as illustrated in the screen image below. The “Workflow Summary” button will display a summary of activity in the current record workflow and the “Workflow Active Step” button will display the current record workflow process screen where the user can perform the pending action to advance to the next step. The text appearing next to the “Workflow Active Step” button indicates the current step of the active workflow and the text appearing below the “Workflow Summary” button indicates the current status of the active workflow. The workflow status could take on several possible values such as Initiated, Completed, Cancelled, or Expired.



Moving to the next step in the workflow
Clicking on the “Workflow Active Step” button will display the current record workflow process screen where the pending action(s) can be performed in order to advance to the next step in the workflow process.

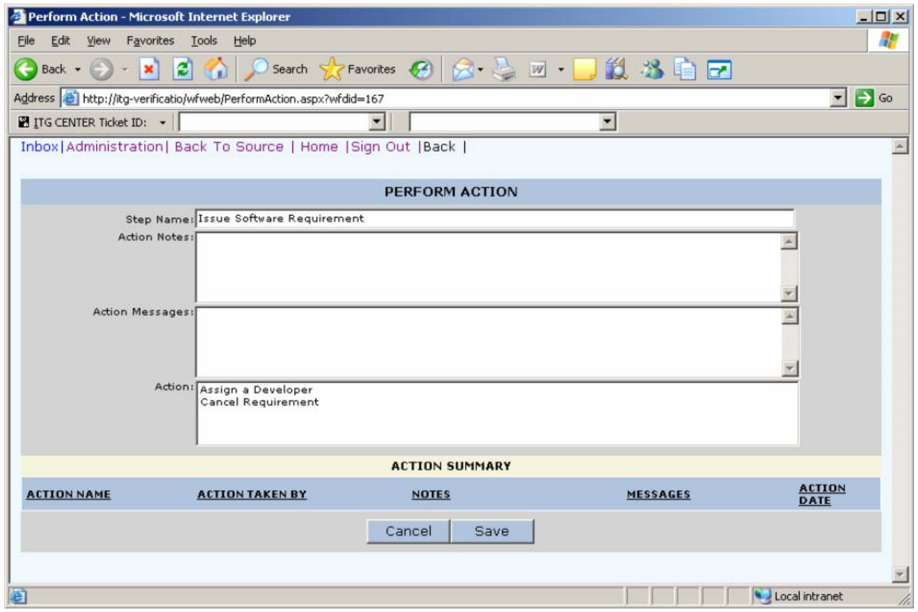


The “Active Step” section provides information related to the current step in the workflow and the action pending. The action pending can be performed by selecting the “Perform Action” link found on the right.

The “Steps Pending” section provides a list of the steps in the workflow that are next in line after the current step has been completed.

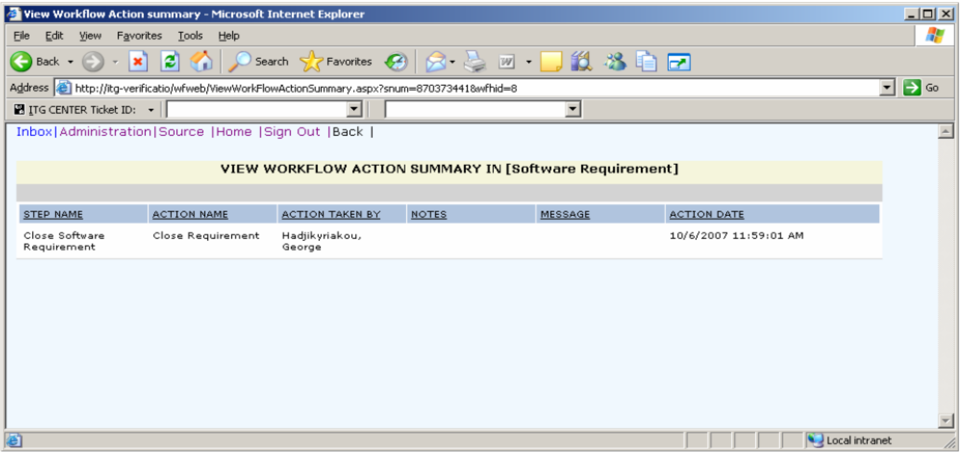
Finally, the “Completed Steps” section will display the workflow steps that have been completed.

Performing a workflow step action
Selecting the “Perform Action” link, displays the “Perform Action.”



Here, the user would enter text in the <Action Notes> and in the <Action Messages> fields to describe relevant information regarding the current action being performed. Then, from the <Action> list box, the user may select one of the possible actions that can be performed while in this workflow step. After selecting an action and saving, an email alert will be sent if a “notify event” was previously configured for this step action.

Workflow summary screen
The workflow summary screen of any source record is displayed when the “Workflow Summary” button, located at the top of the edit screen of the source record, is selected. The workflow summary screen displays the list of workflow steps that have been processed along with the action taken within each step, the name of the user that performed the action, the time and date the action was performed, and any notes and/or comments that may have been recorded by the user that performed the action.



Workflow User Inbox

The User Inbox screen is used as a way to provide the user a way to monitor his or her workflow related data. The data is displayed in two sections. The top section displays workflow data indicating the number of workflows Initiated, Cancelled, Completed, and Expired. The bottom section displays a list of active workflow records with a pending action. The values displayed in both sections are hyperlinks to help the user navigate to a more detailed screen for review or for further processing.