



DIRECT • DRIVE • AUTOMATE

Your Business Processes

Workflow Management Software:

Uniting business with technology to satisfy business process management needs

A White Paper

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What is Workflow?

Workflow has been defined as the automation of a business process in which documents, information or tasks are passed from one participant(s) to another for action, according to a set of procedural rules. A workflow is made up of many functions and activities such as a review process, task lists, notifications, alerts/triggers, reminders, context sensitive tasks, an approval process, status/tracking, due dates and reporting.

Workflow is normally comprised of a series of logical steps called a hierarchy that define a business process. Each step contains a task to be completed and the participants that will perform the task. The task could be items such as a review assignment, an approval process, or a request to update a document. Some tasks within a workflow hierarchy, such as a simple email notification, can be automated and require no participants.

Automated workflow is important inside an organization because it ensures maximum throughput and accuracy when distributing work or tasks. It improves the control of a process with less manual intervention, eliminating misplaced work, reducing delays, and ensuring tasks are performed according to your company's policies and procedures.

Workflow Director's Workflow Management Software

Workflow Director from BP Logix is a web-based software solution built on a workflow automation system that manages, automates and reports on an organization's critical business processes. Workflow Director contains powerful **workflow management software** (workflow software) that is designed to automate an organization's existing processes without changing the way employees do business.

Workflow Director's **workflow software** unites business and technology by aligning business processes with the goals and capabilities of the people and applications involved in their execution. The workflow engine provides a 100% web-based interface that enables business users to graphically model and build their processes -- without requiring either development or advanced IT resources.

Workflow Director's workflow software supports two essential workflow types: *dynamic* and *predefined*.

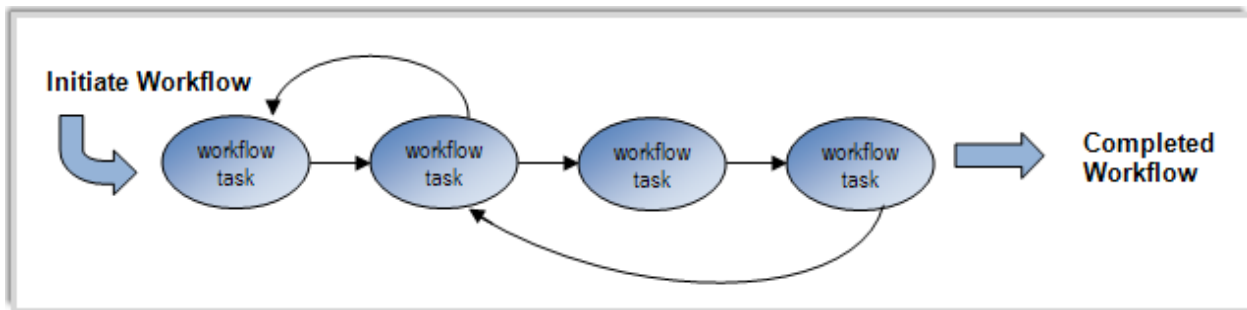
Workflow Director's dynamic *workflow* (also known as "ad hoc") is well suited for small to mid-size collaboration teams. It allows users to create and manage a workflow very quickly and easily without knowing the entire process ahead of time. A new workflow is started for each use allowing for maximum flexibility.

Workflow Director's *predefined workflow* provides a powerful, high-volume, mechanism to automate and prioritize your content management and review processes. It is designed to support processes with many tasks and/or a large number of participants. Workflow definitions can be created by authorized users. The workflow definitions support a series of logical steps, each with a specific task and assigned participants.

The advantage of a predefined workflow is that users can initiate them without knowing anything about the workflow details or the business process. Additionally, users that are assigned to workflow tasks are presented with a concise and easy to understand web page relevant to the task or activity requested of them. They do not require any knowledge about the previous or future steps in the workflow. A workflow can ensure that subject matter experts are involved at the appropriate stages during the document lifecycle for different document types.

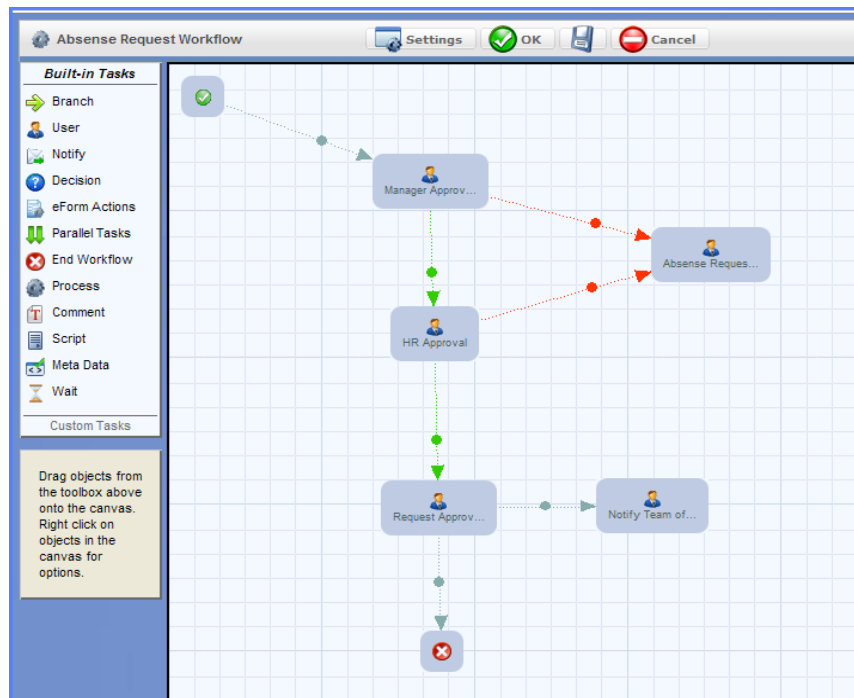
Workflow Definitions

Workflow Director's workflow engine supports a powerful and easy-to-use graphical workflow definition builder. A workflow definition allows a review and approval process to be predefined and automated. Workflow definitions can be created for different document types, eForms, or organizational processes.



For example, a workflow definition can be created that defines how Press Releases (PR) are created, reviewed, approved and ultimately published. Another workflow definition could determine how an employee absence request is reviewed by management and Human Resources for approval, per the workflow diagram to the right.

The workflow defines the path or route a document or eForm must take. Each step in the workflow path defines the task, the participants, and the rules that govern how the workflow will advance or transition to the next step.



Sub-Processes

Workflow Director supports hierarchical and non-hierarchical workflows. A hierarchical workflow is a sub-process (or sub-workflow) that can be initiated by an authorized user from inside a step of an

<i>wait</i>	This task will wait for a specified event (e.g. a child workflow completing) before proceeding to the next step.
<i>comment</i>	This task type is for documenting the workflow and allows text to be entered that can be used to describe the workflow process.
<i>[custom]</i>	Custom tasks can be created to perform business logic.

Workflow Participants

Any number of users can be assigned to a step in a workflow hierarchy allowing for both parallel and serial workflows. The Workflow Director workflow engine supports *groups*, which are a logical grouping of users, allowing for the assignment of users to individual workflow tasks.

Conditionals and Branching

Each step in the workflow process runs serially, while all users in a workflow step run in parallel. The Workflow Director workflow engine supports conditional processing and workflow branching. Conditional processing allows the workflow to progress in a different direction or run different tasks based on some condition (e.g. categorization, attribute values, eForm field values, document information, approval, etc.). The conditional processing and branching allow iterative processes to occur during any type of routing.

Workflow Rules

Each task in a workflow defines a set of rules which include time limits, priorities, notification options and how to advance or transition to the next step. Authorized users have the ability to administer the workflow, including restarting it, canceling it, or moving it to another step in the hierarchy.

Task Priorities

The Workflow Director workflow engine supports task priorities. Priorities allow users to work more efficiently by delivering the highest priority work items first.

Notifications

As the workflow advances to a new step, the assigned users are automatically notified using your corporate email system. A custom email can be sent that provides users with special instructions that are relevant to this specific task.

Task Lists

Workflow task lists or queues are fundamental to workflow management systems. The Workflow Director workflow engine supports an integrated *Task List* that provides each user with a list of their assigned tasks, according to priority and due date. As a user completes their assigned task, the item is automatically removed from their task list.

Due Dates

Due date management functions allow due dates to be set for the entire workflow, as well as for each step in a workflow. Periodic reminders can be automatically sent to users that have not completed their task. When a due date expires for a step the due date escalation rules determine if the system should automatically advance the workflow to the next step, notify other users, notify their managers, start a new workflow process or jump to another step within the workflow.

Workflow Administration

All active workflows can be tracked, managed and reported on by workflow administrators and workflow owners. The workflow reporting provides a real time view of the active and completed workflows, allowing them to be viewed and updated (e.g. change priority, transition to another step, restart). Each running workflow displays the current location (i.e. step), the status of each user in this step and how long this task has been on the user's queue. Workflow administrators can also view all outstanding tasks assigned to a particular user, allowing them to alleviate bottlenecks by removing a user from this step and possibly reassigning another user to this task.

Summary

Workflow Director from BP Logix is a web-based software solution that provides organizations the ability to manage, automate and report on their critical business processes. Workflow Director's workflow management software is a key component of a "lean BPM" offering from BP Logix that is designed to automate an organization's existing processes, without changing the way employees do business.

The workflow engine in Workflow Director is managed through a browser and requires no programming expertise, thus enabling business users to easily create and modify workflows according to their business needs and processes. Workflow definitions enable organizations to capture their business processes and to manage them according to their own policies and procedures.

In summary, the Workflow Director workflow management software enables businesses to model their review and approval procedures, automate the process, monitor the results, and satisfy their business process management needs.