GO WITH THE FLOW – USING CONFIGURABLE WORKFLOW TO AUTOMATE & STREAMLINE PROCESSES

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WHAT IS WORKFLOW?

• OnBase Workflow is an automation engine and electronic routing system that enables organizations to process work faster and more efficiently.
WHY USE WORKFLOW?
CONSISTENCY

• Consistency leads to Improvement
HOW DOES WORKFLOW HELP?

- Define and Structure Processes
- Automatic Routing
- Single Interface
- Rules Evaluation
- Parallel Processing
- Accountability
- Reporting/Monitoring
KEY FEATURES

• Over 180 pre-defined rules and actions
• System work
• Flexible and user-configurable interfaces
• Automatic eMail notifications
• Configurable Timers
• Load Balancing/Roles
• Security
WORKFLOW CONCEPTS

- Life Cycle
- Queue
- Inbox/Workbasket
- Filters
- Tasks
- eForms
- Roles/Groups/Load Balancing
- Workflow Folders/Related Documents
DESIGN

- Layout the structure
ARCHITECTURE

- Put in the plumbing
  - Rule Evaluations
  - Actions
  - User Tasks
WORKFLOW TOOLS

• OnBase Studio
• Workflow Doctor
• Documentation Generator
  – User Guide
  – Admin Guide
• Unity Forms Designer
ONBASE STUDIO

Life Cycle
Tree View

Graphical
Design View

Configuration
Panel
WORKFLOW DOCTOR

Notification of incorrect or incomplete settings
DOCUMENT GENERATOR
DOCUMENT GENERATOR

Create Documentation Wizard

Select a template

- Administration Guide
- User Guide

Completed
11 LIFECYCLE: WS - Work Orders

11.1 Description

11.2 User Groups

11.3 Document Types

11.4 Document Source and Destinations

11.5 QUEUE: Request Review

11.5.1 Description

11.5.2 User Groups
**Work Order**

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**Requestor for Information**

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**Please describe the requested information**

**Types of copies being requested**

- ELECTRONIC

**This request is for commercial purposes?**

It is a violation of the Freedom of Information Act for a person to knowingly obtain a public record for a commercial purpose without disclosing that it is for a commercial purpose, if requested to do so by the public body. R.S.C. 1985, c. F-3, s. 1(c).
UNITY FORMS DESIGNER

- Point and Click Configurable
- Drag and Drop

No Coding!
Add a new task to an existing Workflow Queue

- Unity Client Workflow Interface
- OnBase Studio

Create a new eForm

- Unity Client
- Unity Form Designer
BEST PRACTICES

• Prepare/Document Processes
• Get Buy-In
• Re-evaluate Current Processes/Ask Why?
• Start Small/Life Cycle to Life Cycle
• Plan a process that accounts for exceptions. Don’t let exceptions create your process.
• Only use scripting when necessary
• Get the Right People Trained in Workflow
TRAINING AND REFERENCE

• Training
  – System Administration
  – Business Analysis
  – Workflow Administration
  – API
  – Premium Subscription Video Training

• Reference Material
  – OnBase Community Website
  – MRGs
  – API Guides
if you keep going, you’ll get there.

consistency is the key to success.
QUESTIONS?

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