

## Workflow Design

### Goal

To provide students with the knowledge and skills to execute basic Workflow discovery and design for business processes and user requirements. To provide practice scenarios for implementing new Workflow processes and modifying existing processes using currently identified best practices. To help students gain experience in identifying techniques and tools for evaluating the performance of a Workflow solution.

### Course Description

This second-level course will develop students' abilities to accurately assess the design and performance of new and existing Workflow solutions. The course is designed to instruct students in business discovery and proper translation of business logic into OnBase Workflow constructs. The class requires students to create a Workflow project from initial discovery through testing with a variety of business scenarios.

### Topics Covered

- Application Enabler
- Break On
- Business Process Discovery
- Design Considerations
- Diagnostic Console
- Documentation
- Evaluating an existing Life Cycle
- Export to Network Location
- Filters
- Import/Export
- Life Cycle Interactions
- Load Balancing and Ownership
- Notifications
- Properties and Expressions
- Reading Configuration
- Reporting
- Security
- Timers
- Unity Forms
- User Forms
- Verifying data and updating AutoFill Keyword Sets
- Workflow Design Model
- Workflow Roles
- Workflow Tools
- Workflow Variables

### Certifications

This course fulfills the requirement for:

- ▶ OnBase Certified Advanced Workflow Administrator (**Customer**)
- ▶ OnBase Certified Workflow Engineer (**Partner**)

## Measurement

Students are expected to configure a complete Workflow solution including design, implementation, configuration, and testing based on a set of customer requirements for a multi-phased business process.

## Prerequisites

- ▶ Introduction to Workflow

**Note:** It is recommended that Workflow Design attendees also have a minimum of 3-6 months practical Workflow experience in a test, development or production environment.

## Course Agenda

All topics are subject to change and may not appear in the order indicated here.

### Day 1

- Student Self-Assessment
- Workflow Studio
- Troubleshooting Tools
- Logging/History
- Import/Export Review
- Unity Life Cycles
- Timers
- Load Balancing
- Workflow Design Model
- Workflow Variables
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### Day 2

- Discovery
- Design Best Practices
- Load Balancing
- Ownership
- Property Expressions
- Reading Configuration
- Unity Forms
- Workflow Roles

### Day 3

- Load Balancing
- Export to Network Location
- Filters
- Security
- Notifications
- User Forms
- Verifying data and updating AutoFill Keyword Sets
- Workflow Tools
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### Day 4

- Unity Forms
- Life Cycle Interactions
- Reporting
- Student Review
- Begin Final Exam

### Day 5

- Complete Final Exam