Workflow 101

A BEGINNERS GUIDE
TO WORKFLOW DESIGNER

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USER GROUP 2024

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BEGINNER'S GUIDE TO
Workflow Designer

Topics for today's presentation:

What is Workflow

A brief overview of what Workflow is, and what purpose it serves

How to use Workflow

Activities frequently used in Workflow

When to use Workflow

A walkthrough of examples and how you can utilize Workflow in your organization

What is Workflow?

A POWERFUL TOOL

Whatever you envision, Workflow brings it to life.

PROCESS AUTOMATION

Simplify document handling across your environment

THIRD PARTY INTEGRATION

Retrieve information from other systems

...AND MORE!

Send Notifications, Assign retention, Move documents

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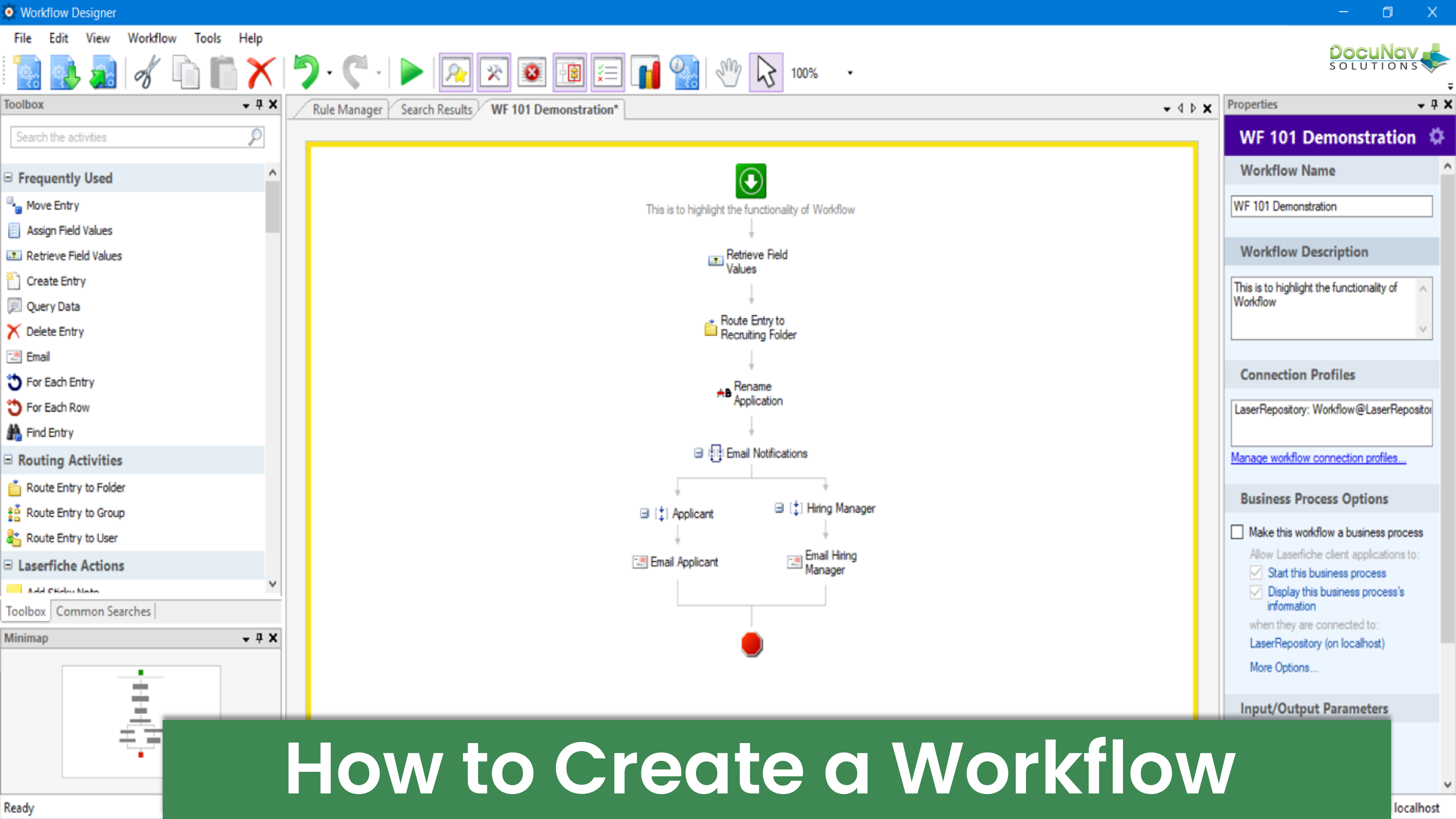
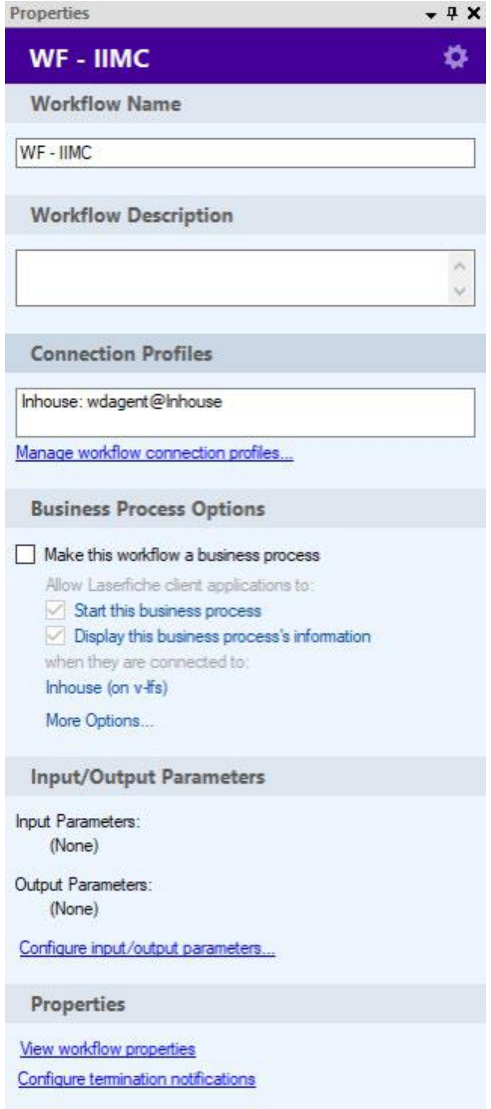
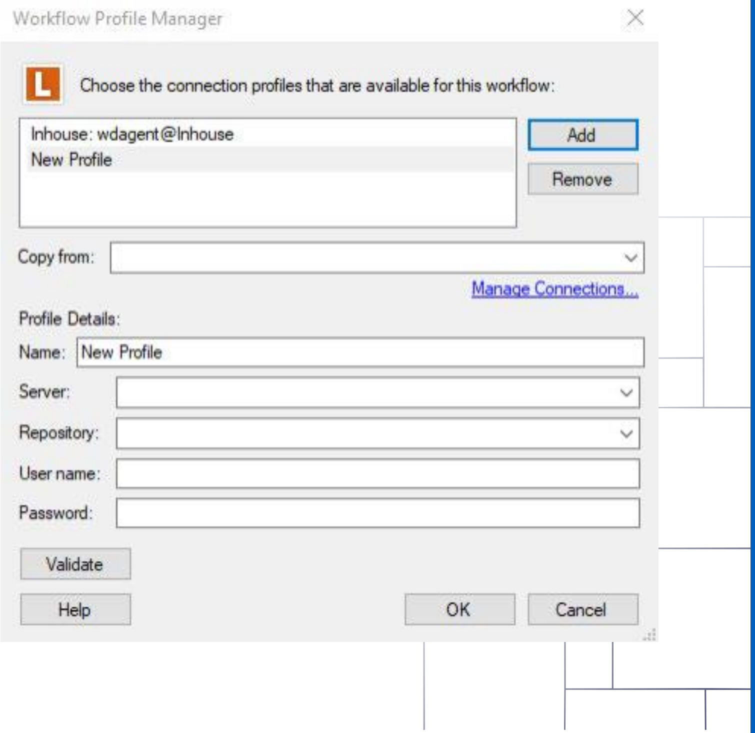
Plan, Plan, Plan!

Before you start building your workflow, it is very important to diagram your process to make sure it’s logical and consistent.

- Make sure the proper people are involved,
- Gathering information by interviewing,
- Finding pain points,
- Are there unnecessary steps?

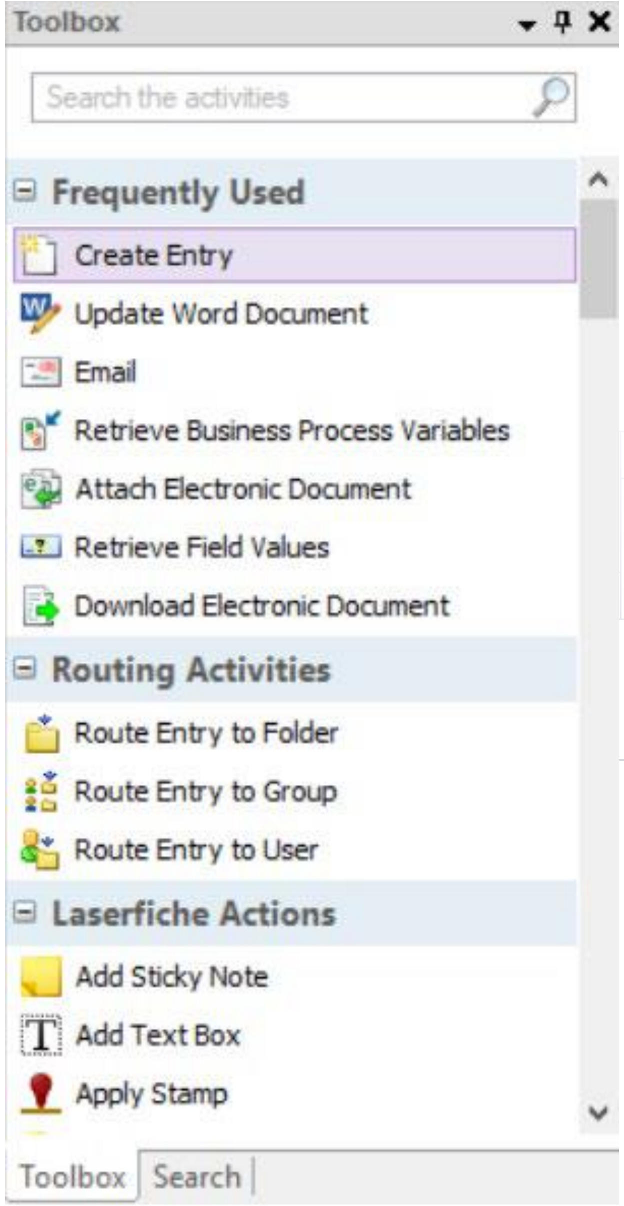

Workflow Designer
File
Edit
View
Workflow
Tools
Help
DocuNav SOLUTIONS
100%
Toolbox
Search the activities
Frequently Used
Move Entry
Assign Field Values
Retrieve Field Values
Create Entry
Query Data
Delete Entry
Email
For Each Entry
For Each Row
Find Entry
Routing Activities
Route Entry to Folder
Route Entry to Group
Route Entry to User
Laserfiche Actions
Toolbox
Common Searches
Minimap
Ready
Rule Manager
Search Results
WF 101 Demonstration*
This is to highlight the functionality of Workflow
Retrieve Field Values
Route Entry to Recruiting Folder
Rename Application
Email Notifications
Applicant
Hiring Manager
Email Applicant
Email Hiring Manager
Properties
WF 101 Demonstration
Workflow Name
WF 101 Demonstration
Workflow Description
This is to highlight the functionality of Workflow
Connection Profiles
LaserRepository: Workflow@LaserReposito
Manage workflow connection profiles...
Business Process Options
Make this workflow a business process
Allow Laserfiche client applications to:
Start this business process
Display this business process's information
when they are connected to:
LaserRepository (on localhost)
More Options...
Input/Output Parameters
localhost
How to Create a Workflow





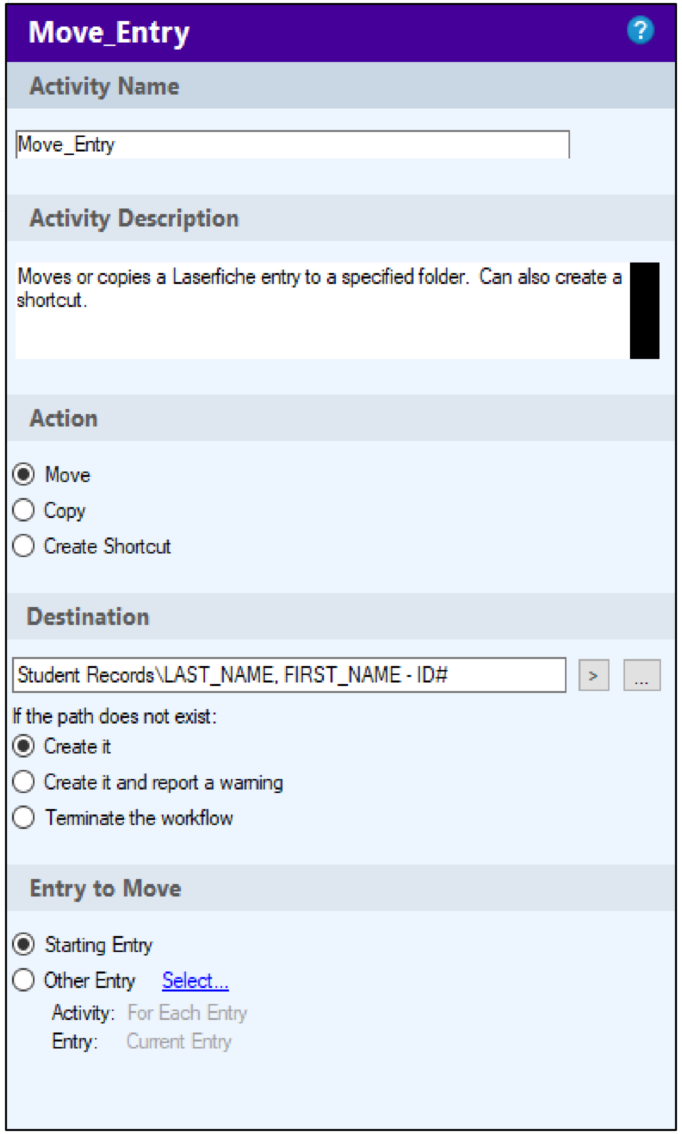
Connection Profile

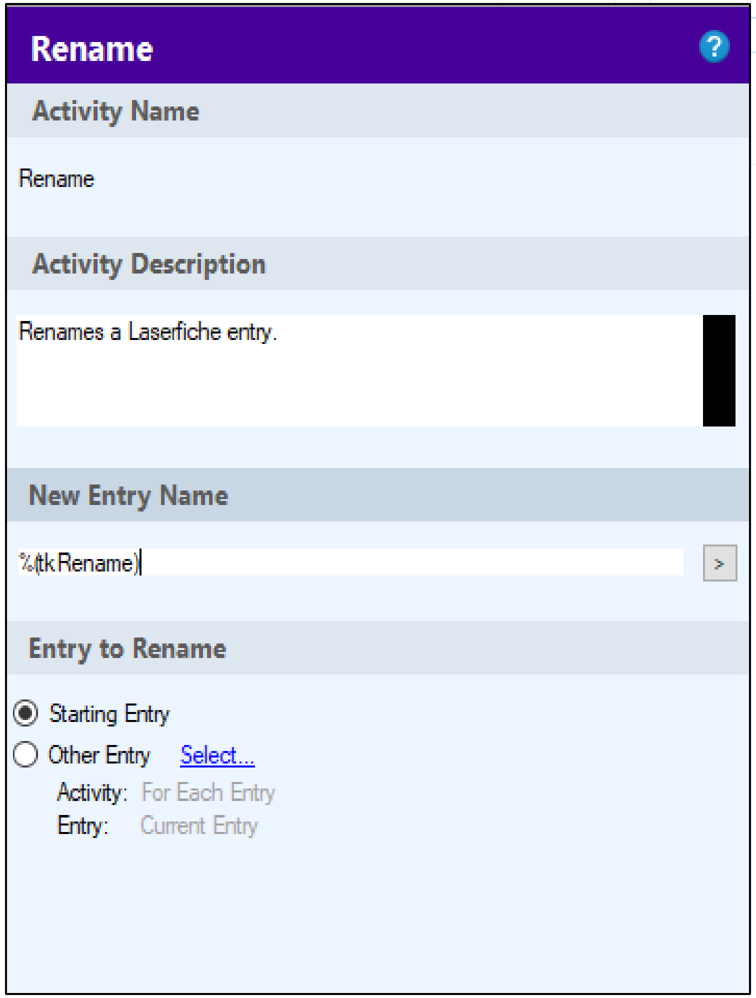
This allows you to interact with the repository.


Toolbox
Search the activities
Frequently Used
Create Entry
Update Word Document
Email
Retrieve Business Process Variables
Attach Electronic Document
Retrieve Field Values
Download Electronic Document
Routing Activities
Route Entry to Folder
Route Entry to Group
Route Entry to User
Laserfiche Actions
Add Sticky Note
Add Text Box
Apply Stamp
Toolbox
Search

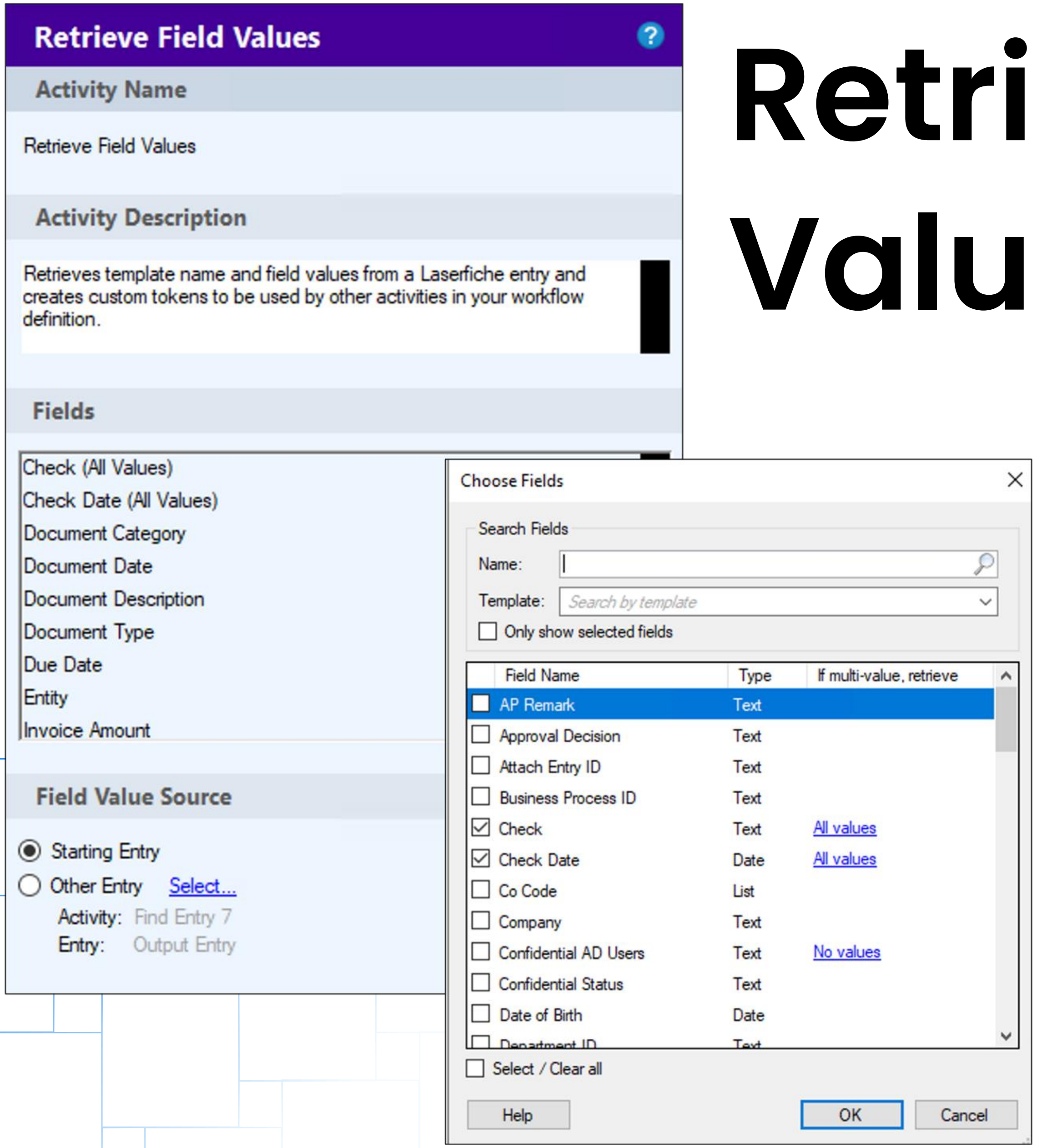
Activities

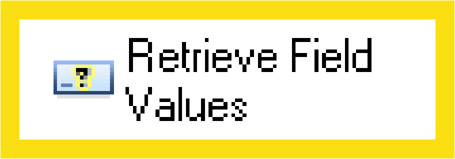
Move Entry & Rename Entry



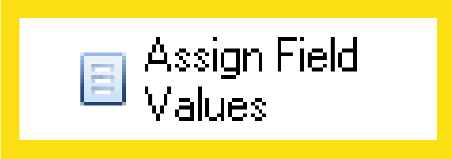


Retrieve Field Values





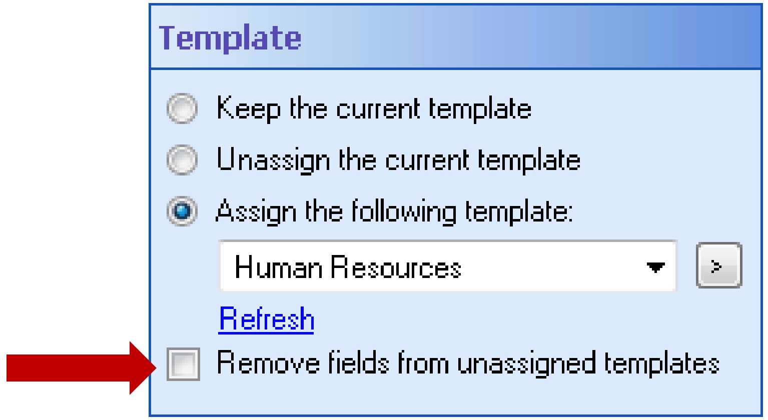
Assign Field Values

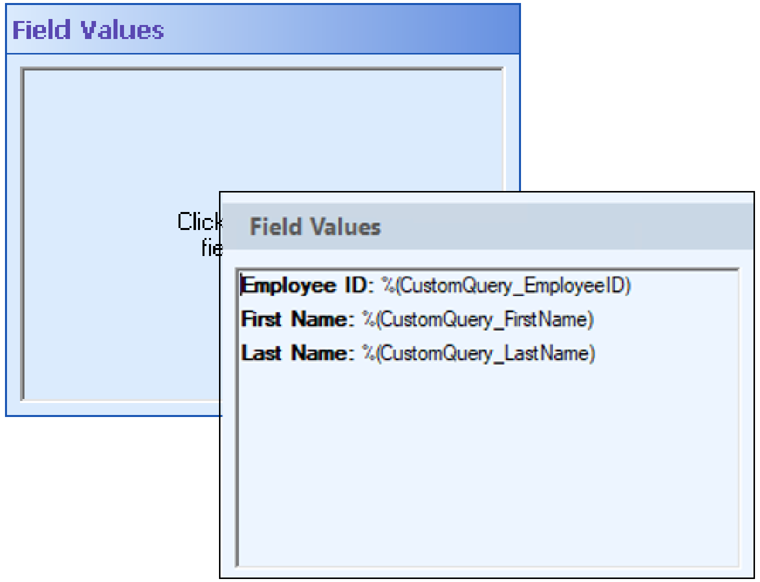


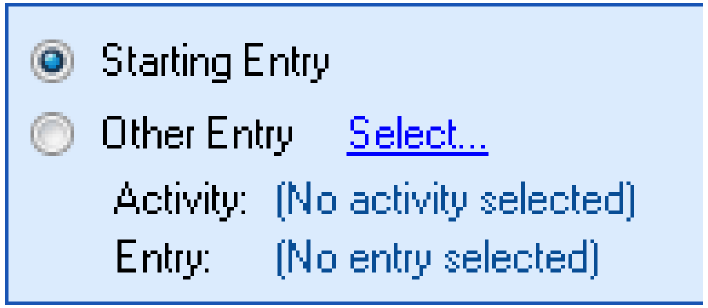
1-Choose template option

2-Pick Your Metadata fields

3-Apply it to your entry







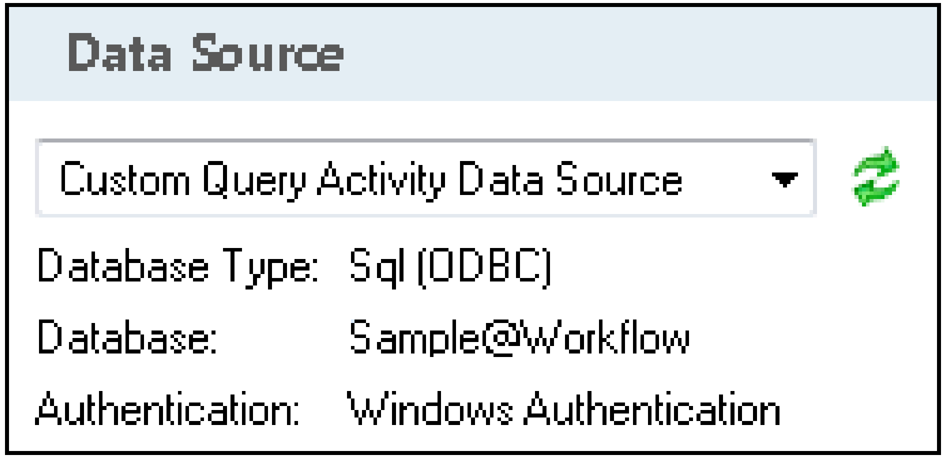
Data Activities

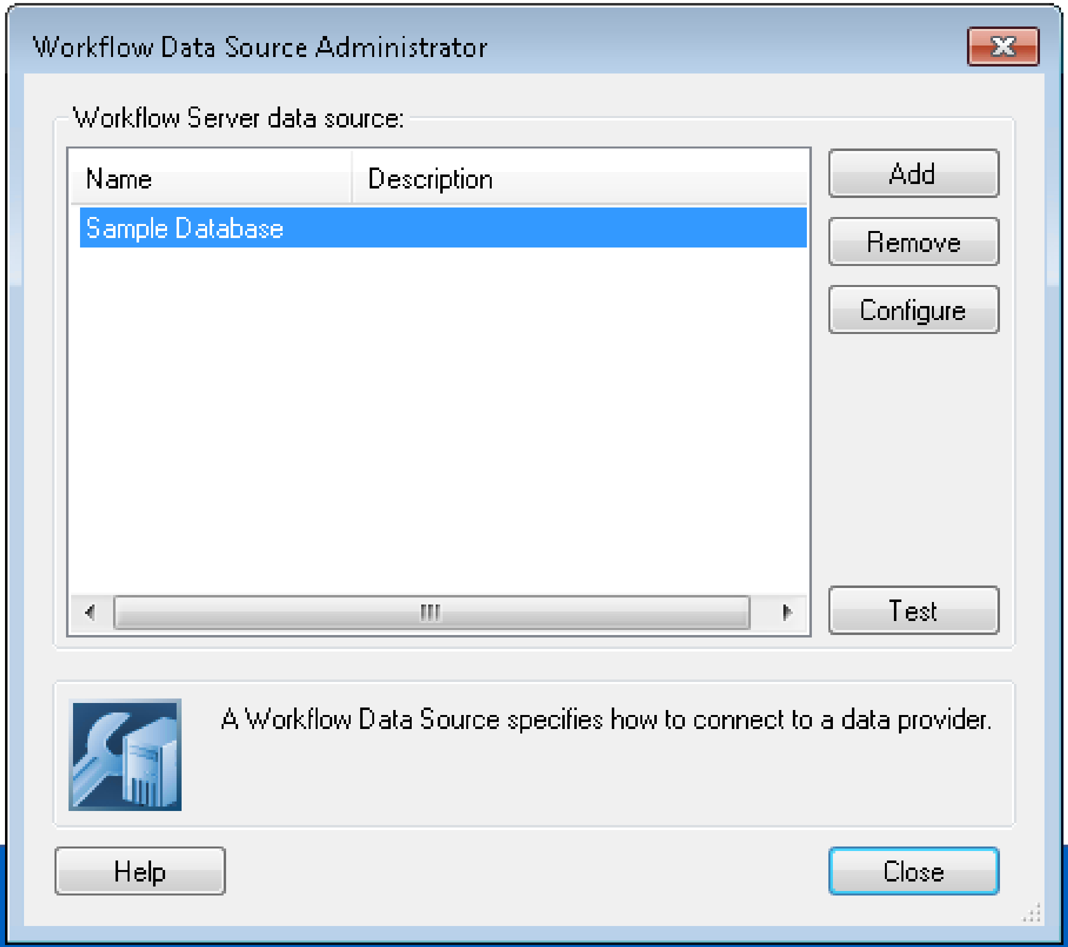
Query Data

Insert Data

Update Data

Custom Query

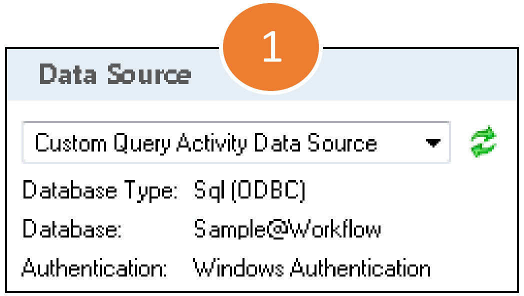


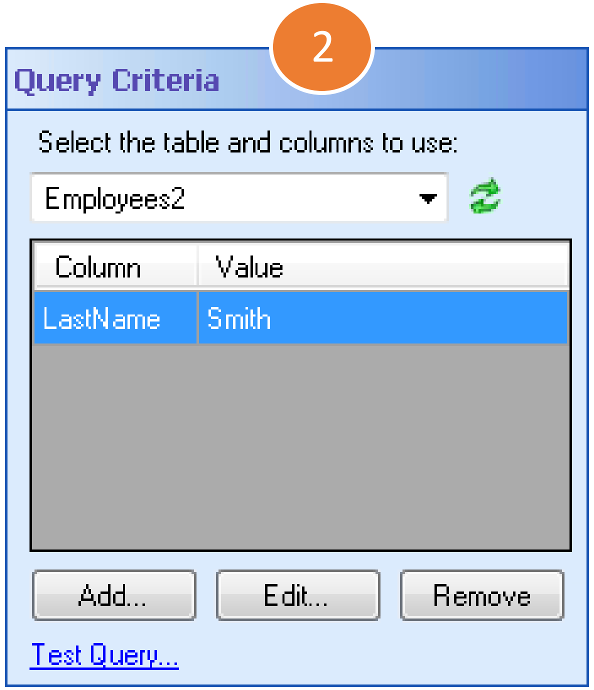


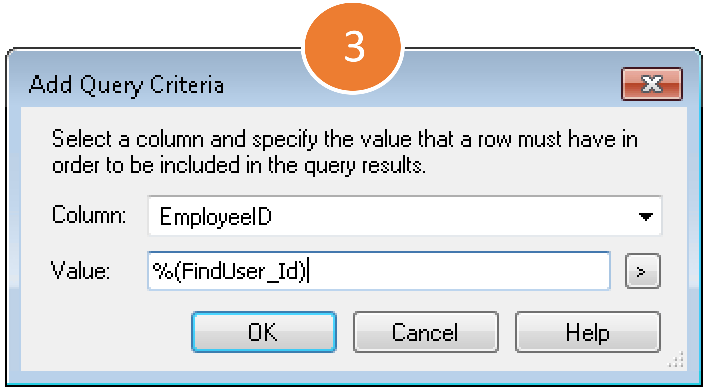
Connecting your Data Source

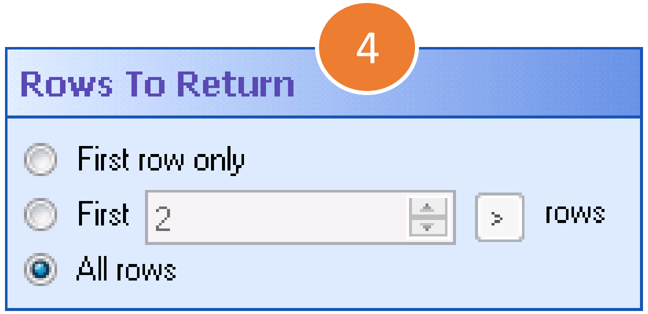
Query Data

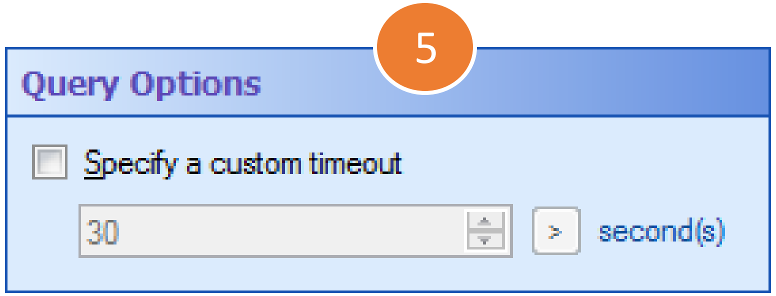

Query Data


1
Data Source
Custom Query Activity Data Source
Database Type: Sql (ODBC)
Database: Sample@Workflow
Authentication: Windows Authentication

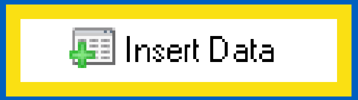

2
Query Criteria
Select the table and columns to use:
Employees2
Column
Value
LastName
Smith
Add...
Edit...
Remove
Test Query...

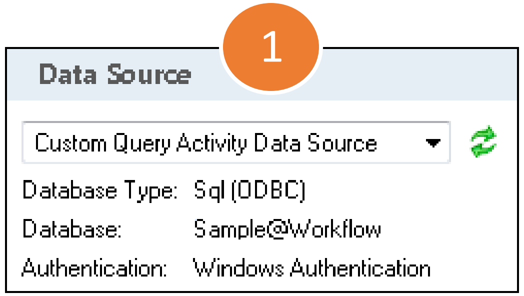

3
Add Query Criteria
Select a column and specify the value that a row must have in order to be included in the query results.
Column: EmployeeID
Value: %(FindUser_Id)
OK
Cancel
Help


4
Rows To Return
First row only
First 2 rows
All rows


5
Query Options
Specify a custom timeout
30 second(s)

Insert Data


Insert Data


1
Data Source
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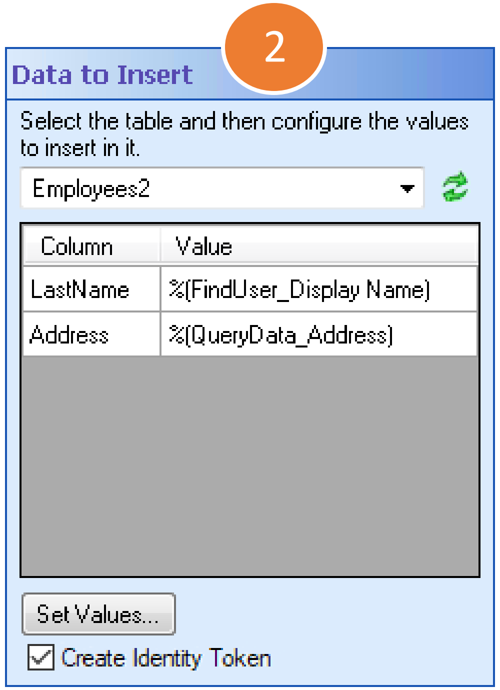
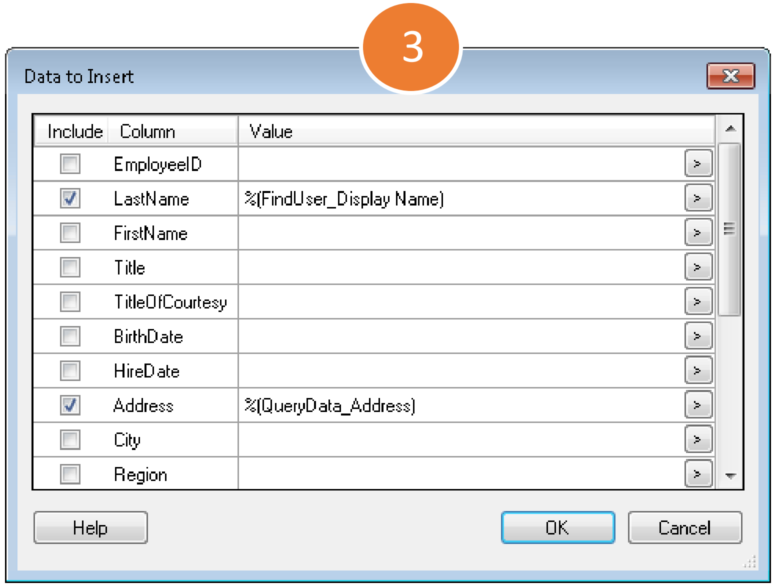
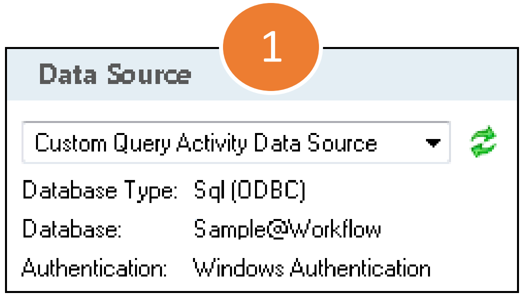
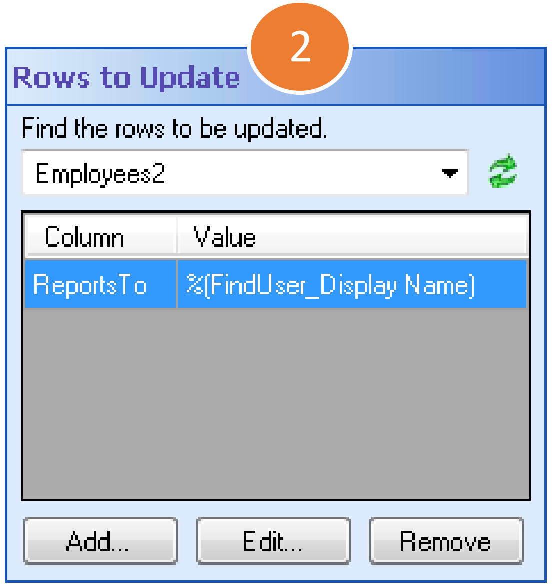

2
Data to Insert
Select the table and then configure the values to insert in it.
Employees2
Column
Value
LastName
%(FindUser_Display Name)
Address
%(QueryData_Address)
Set Values...
Create Identity Token

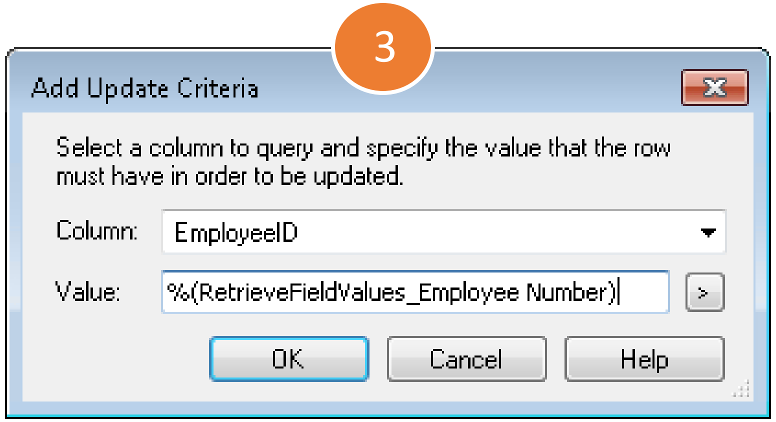

3
Data to Insert
Include
Column
Value
EmployeeID
LastName
%(FindUser_Display Name)
FirstName
Title
TitleOfCourtesy
BirthDate
HireDate
Address
%(QueryData_Address)
City
Region
Help
OK
Cancel

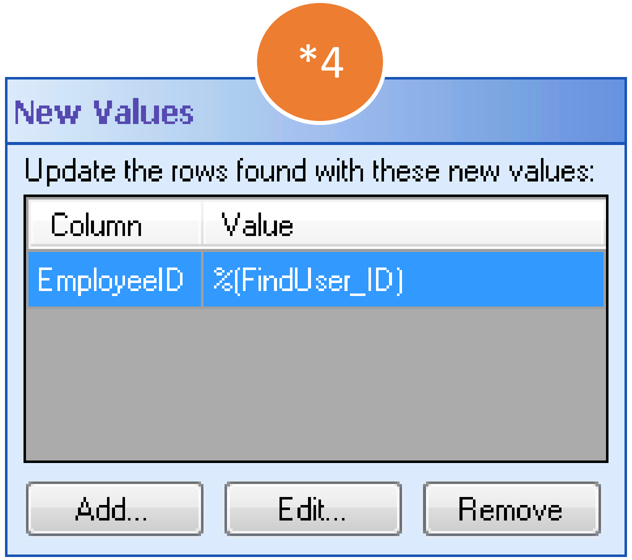
Update Data

Update Data

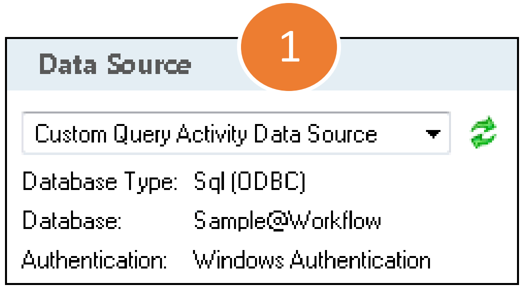


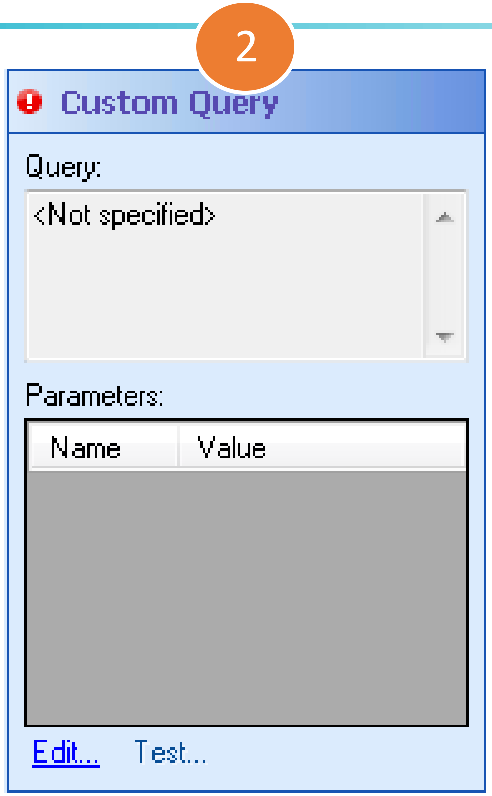


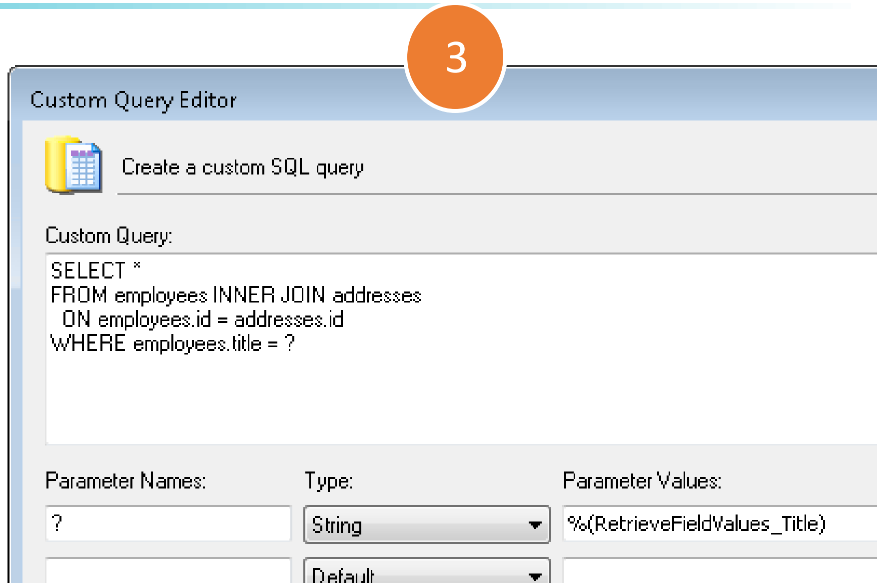


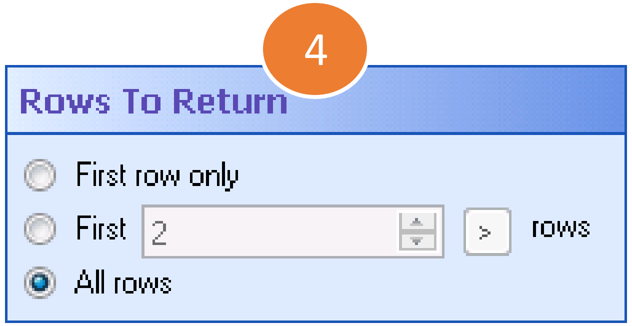


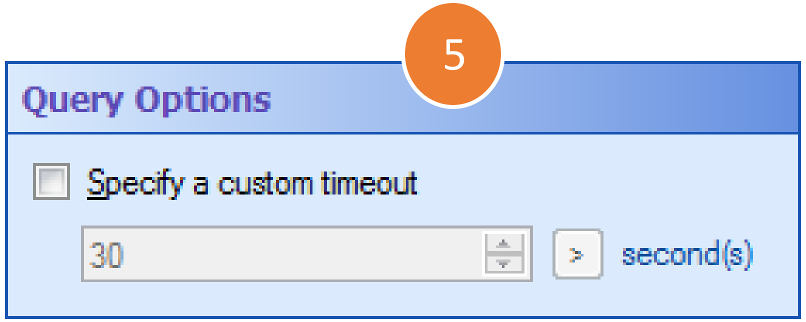
Custom Query







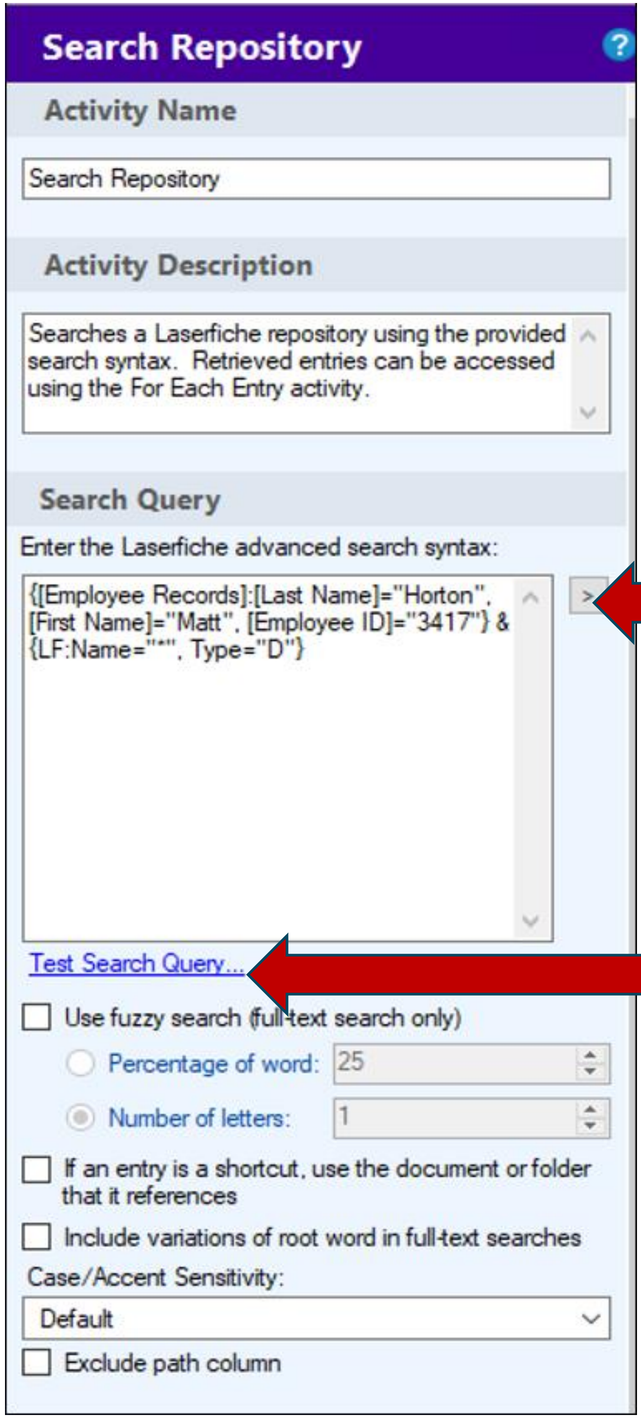


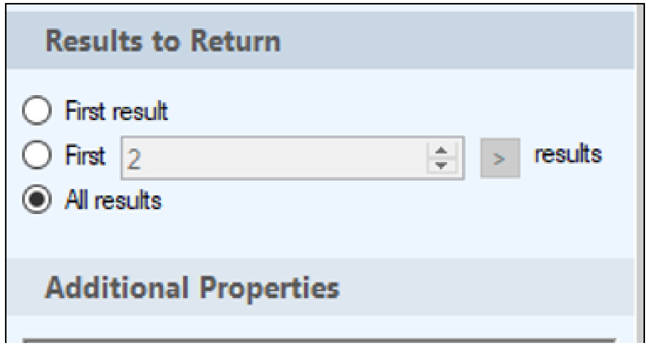


Search Repository

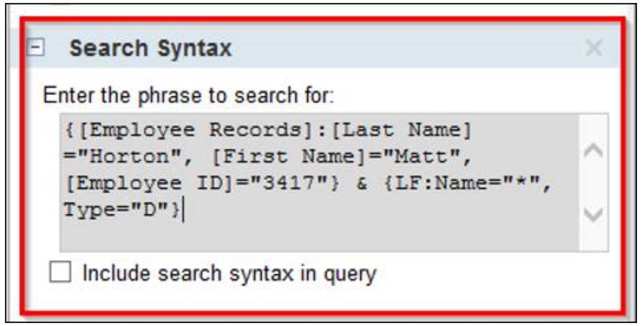
Search Symbols

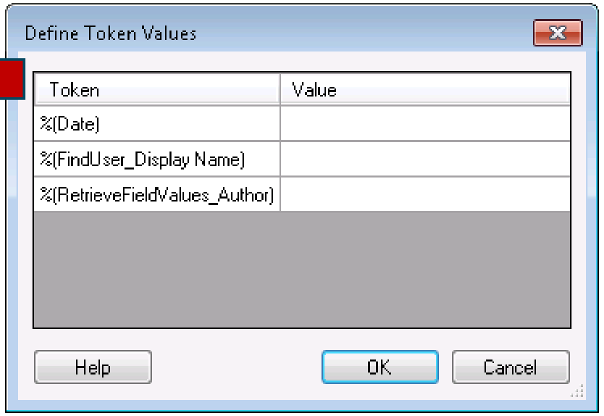
=	equal to	<>	not equal to
<=	less than or equal to	>=	greater than or equal to
<	less than	>	greater than
&	and	|	or
-	not	^N	within N number of words



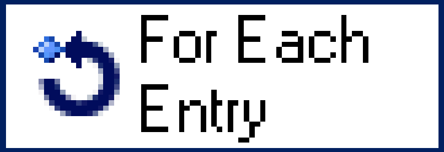


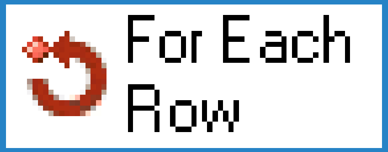
In Laserfiche Client





Repeating Activities





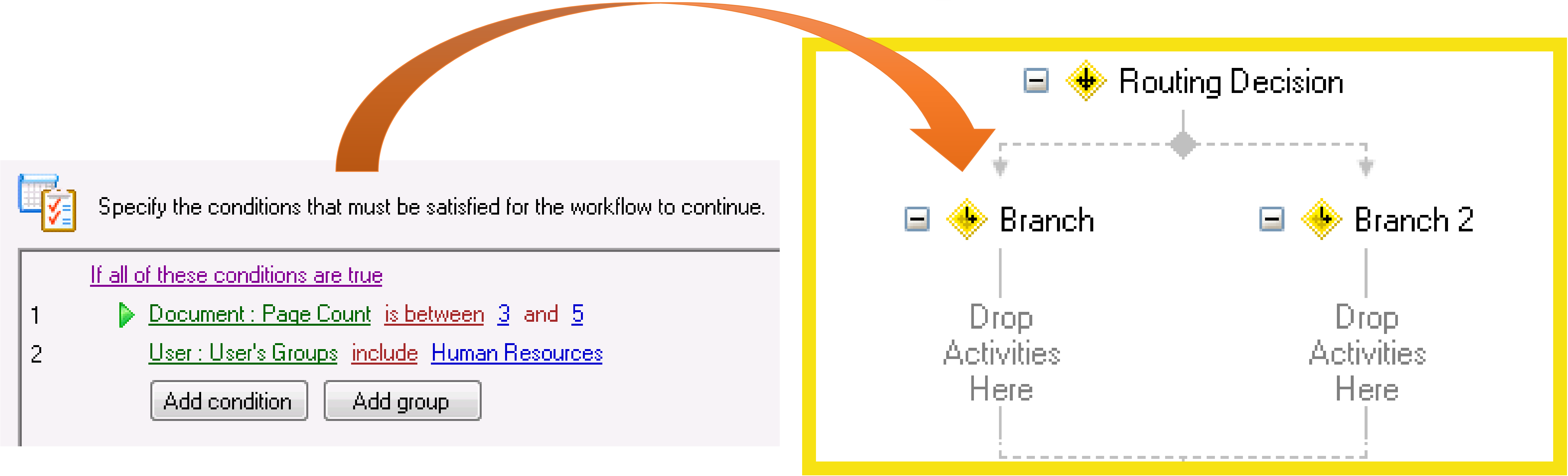
Flow Control Activities

CONDITIONAL DECISION | FIRST

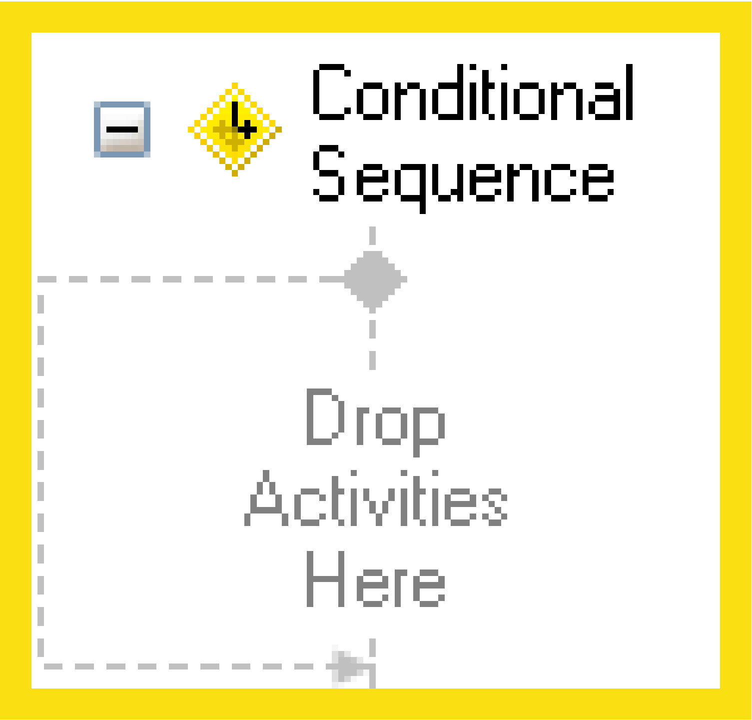
CONDITIONAL SEQUENCE | CERTAIN

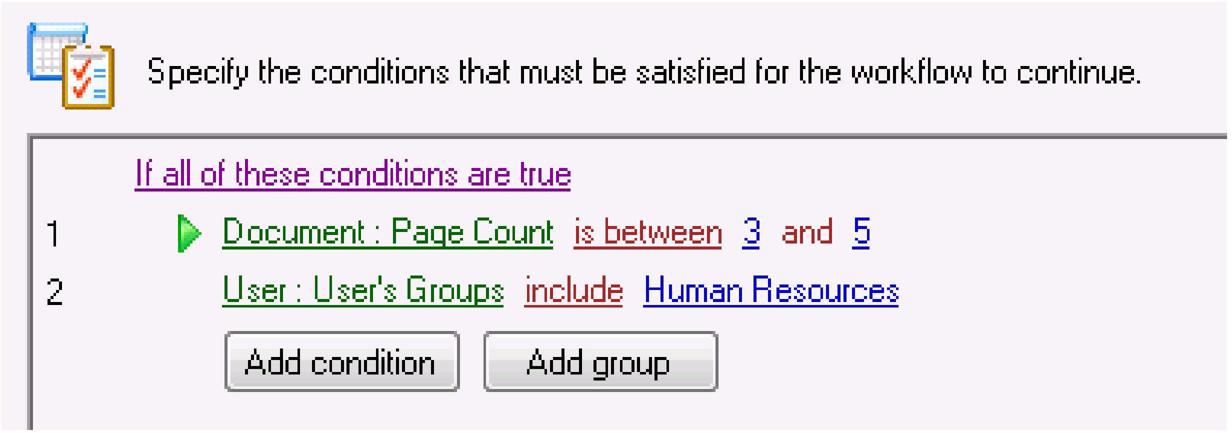
CONDTIONAL PARALLEL | ALL

CONDITIONAL DECISION | FIRST

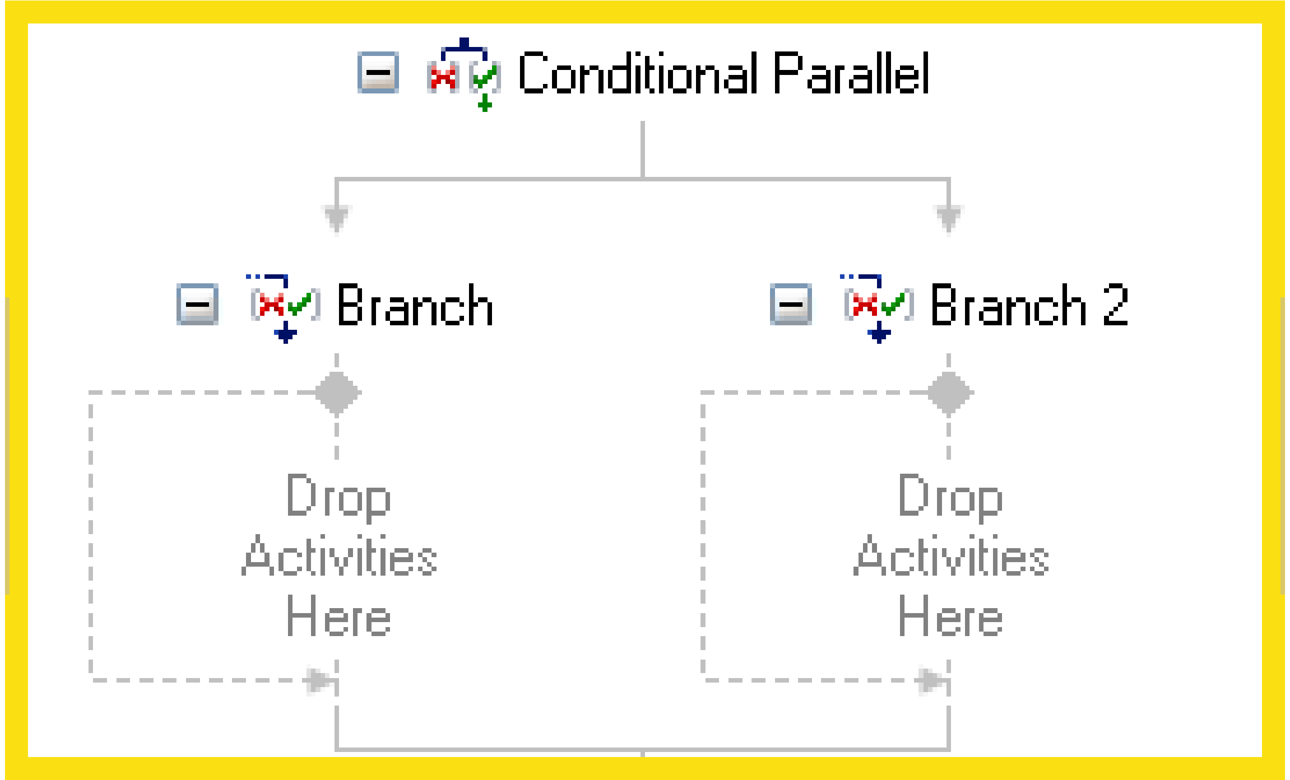


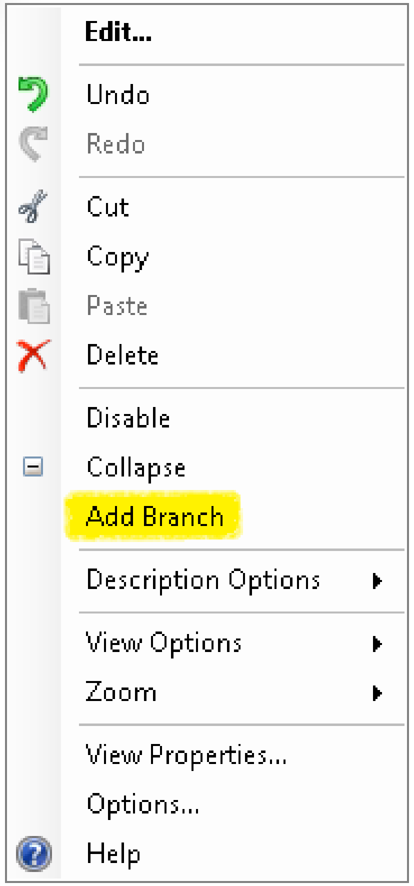
CONDITIONAL SEQUENCE | CERTAIN

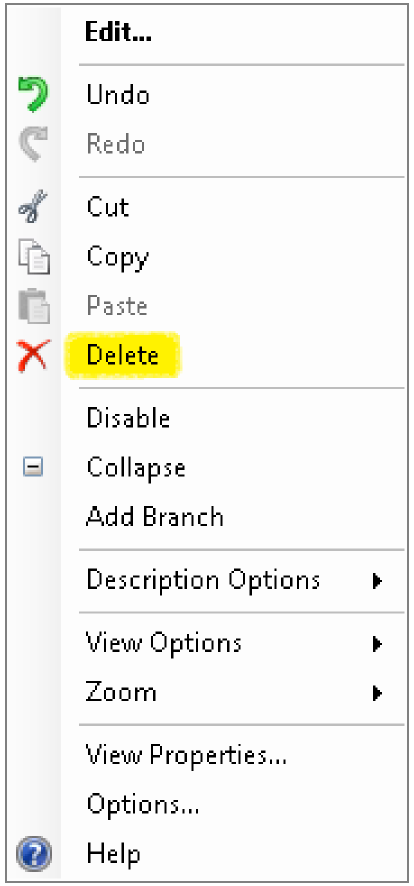




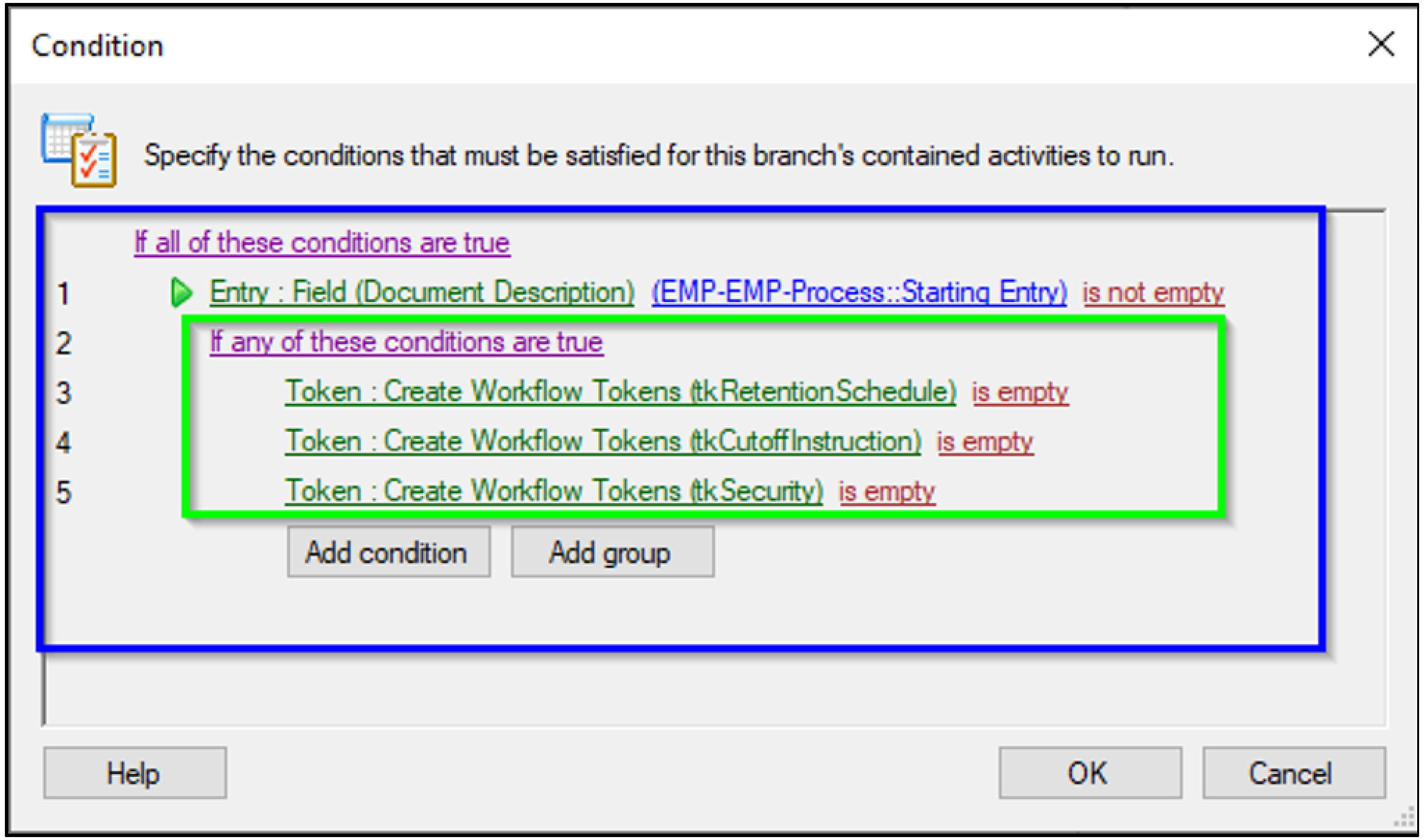
CONDTIONAL PARALLEL | ALL

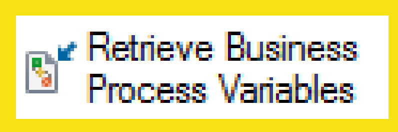




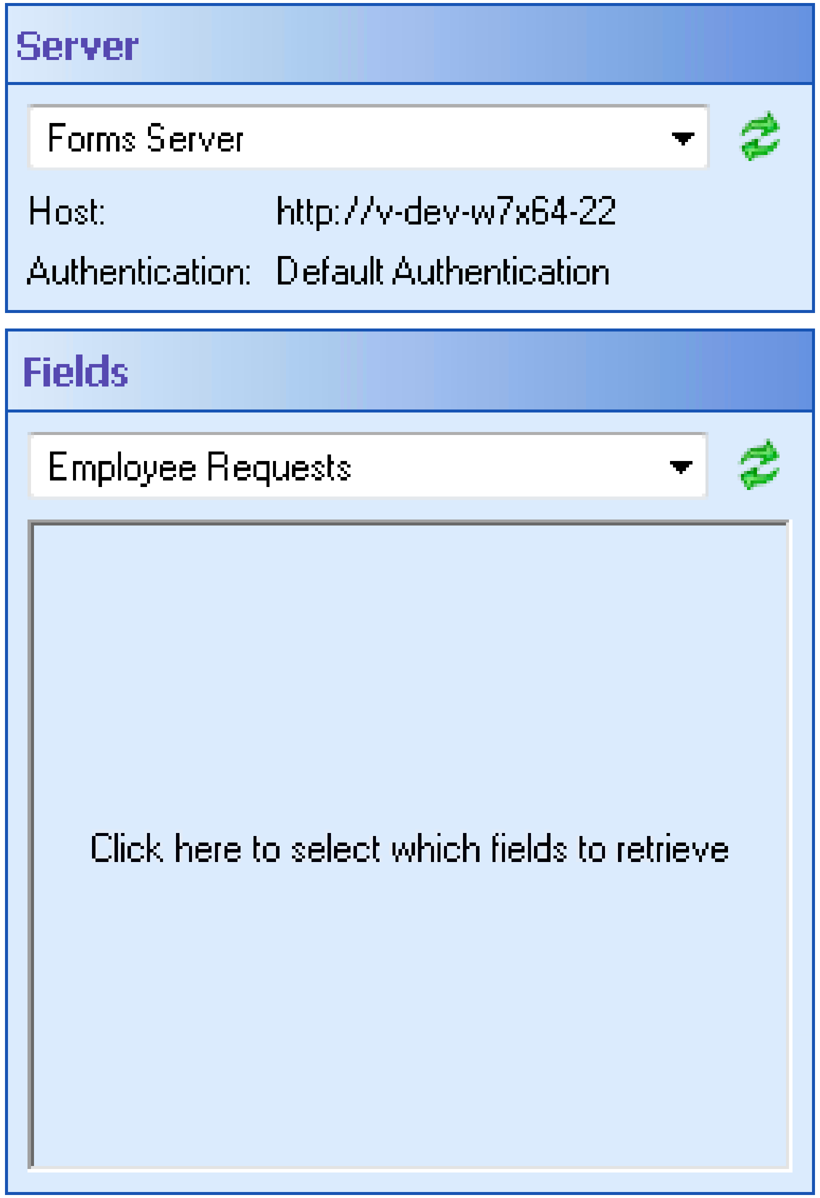


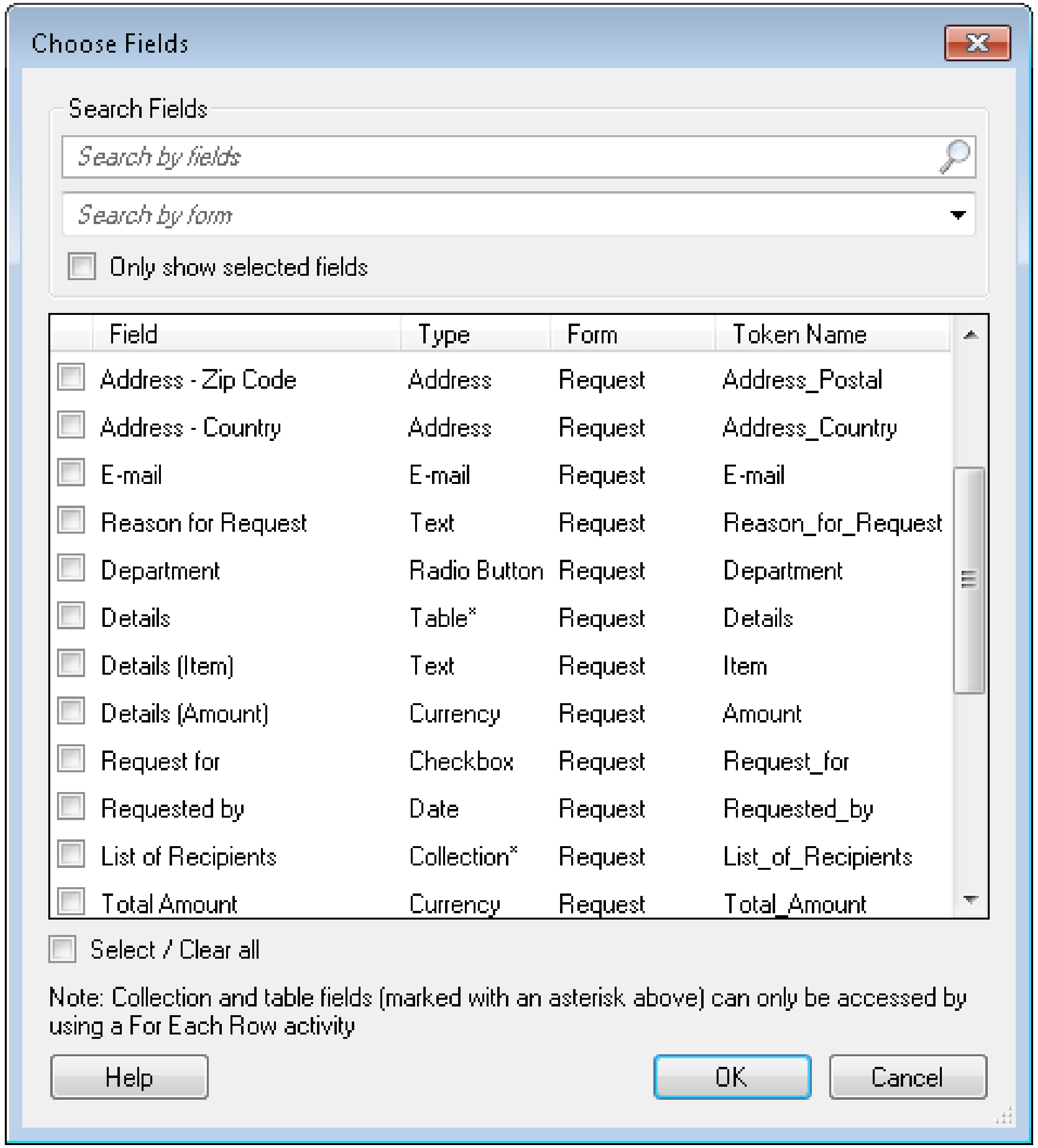
Setting Conditions



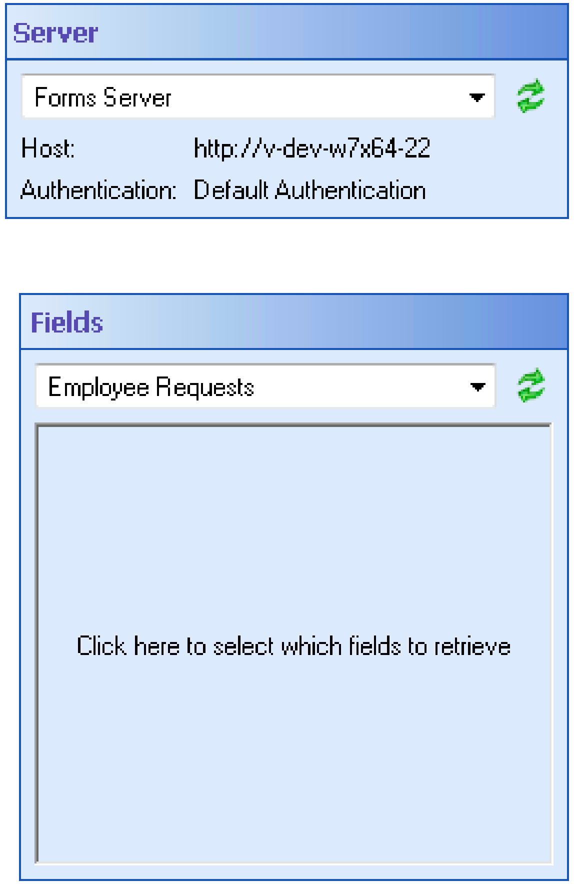


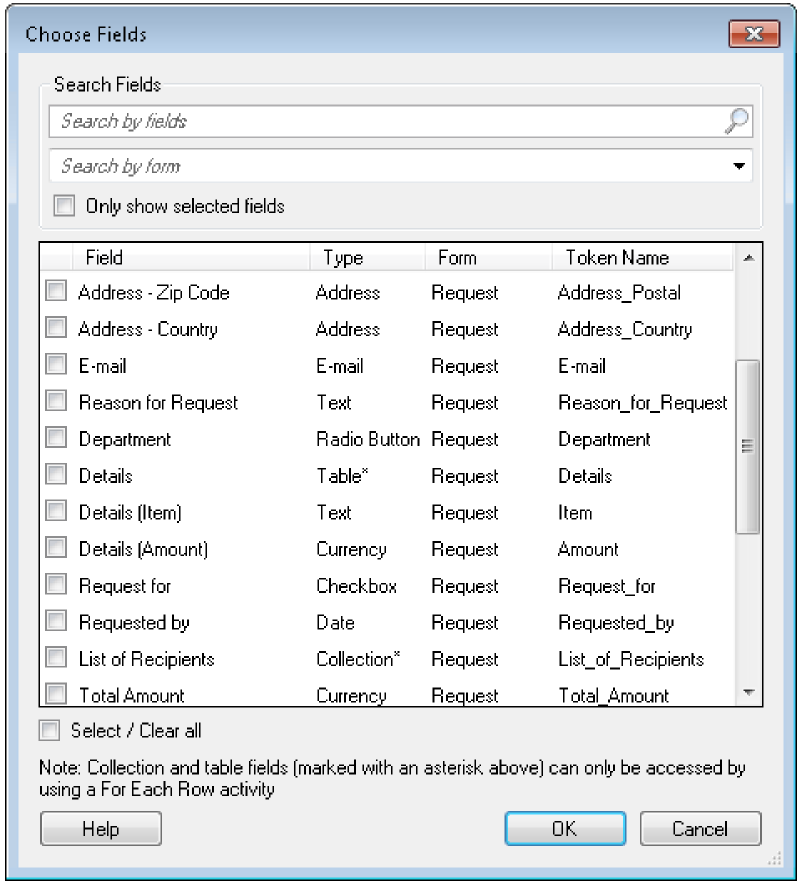
Retrieve Business Process Variables

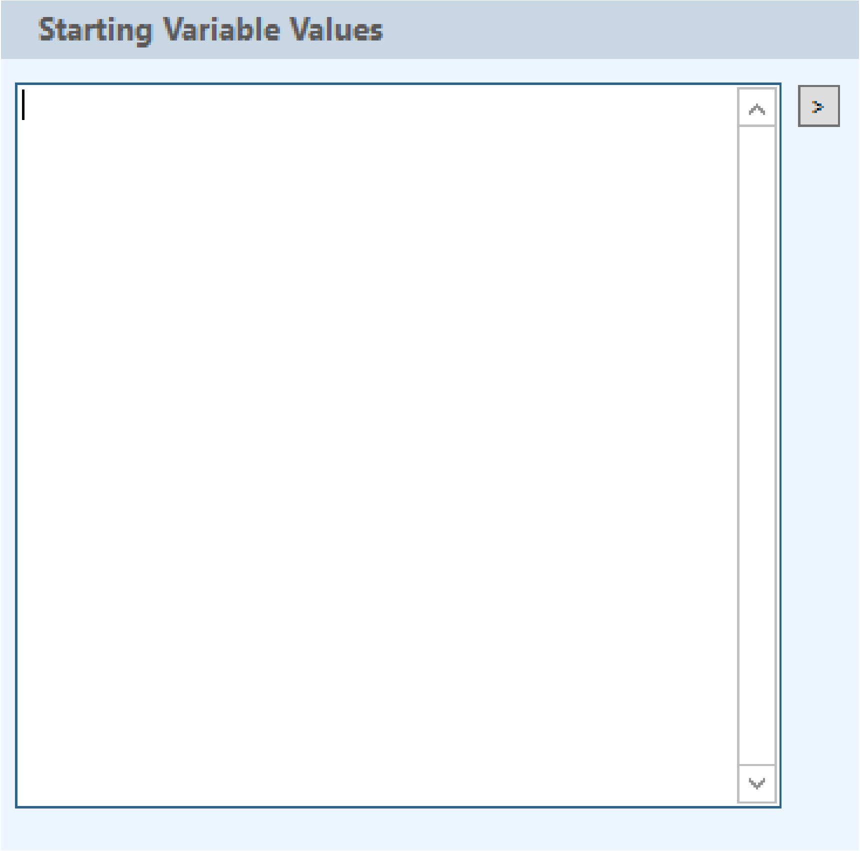




Set Business Process Variables





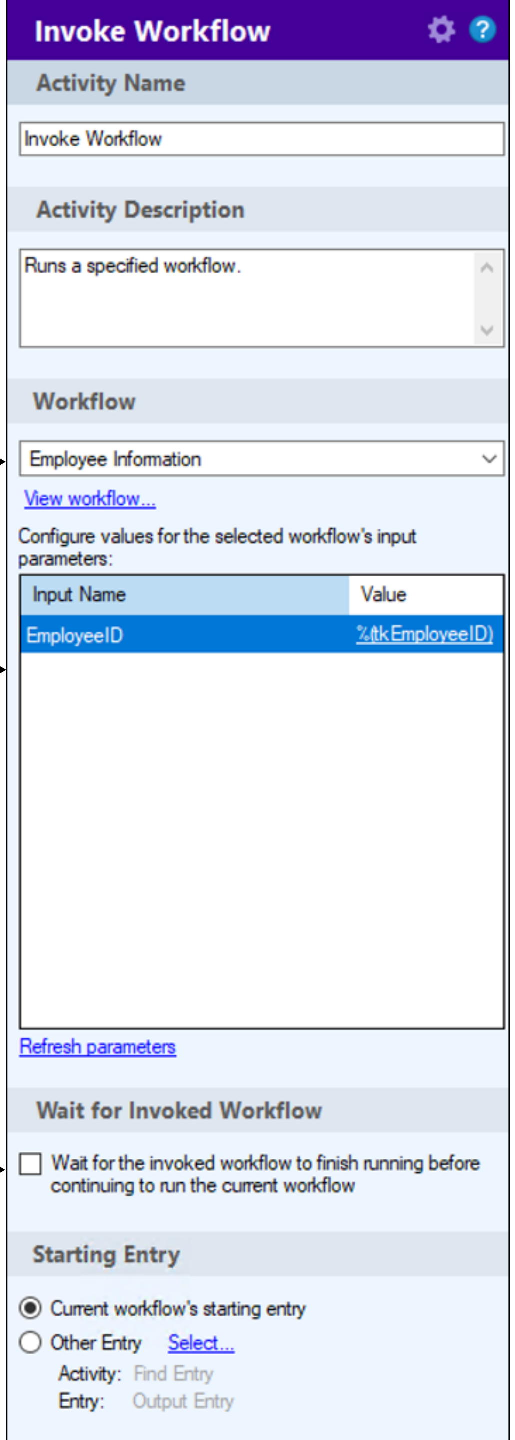


Invoke Workflow

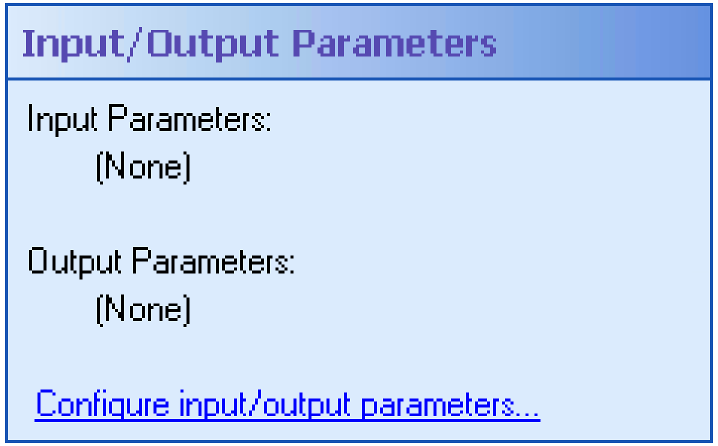
01 Pick the workflow to invoke

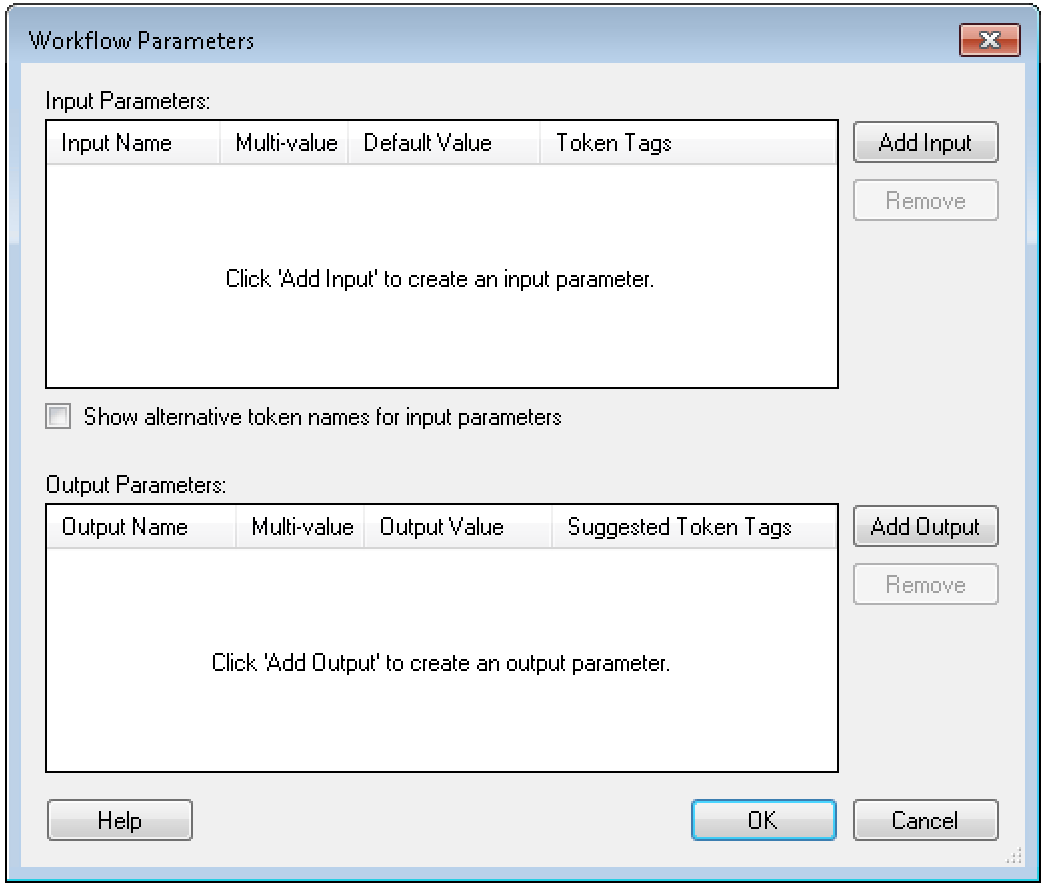
02 If applicable, a list of input parameters will appear under Input Name.

03 Optional: Wait for the invoked workflow to finish running before continuing to run the current workflow

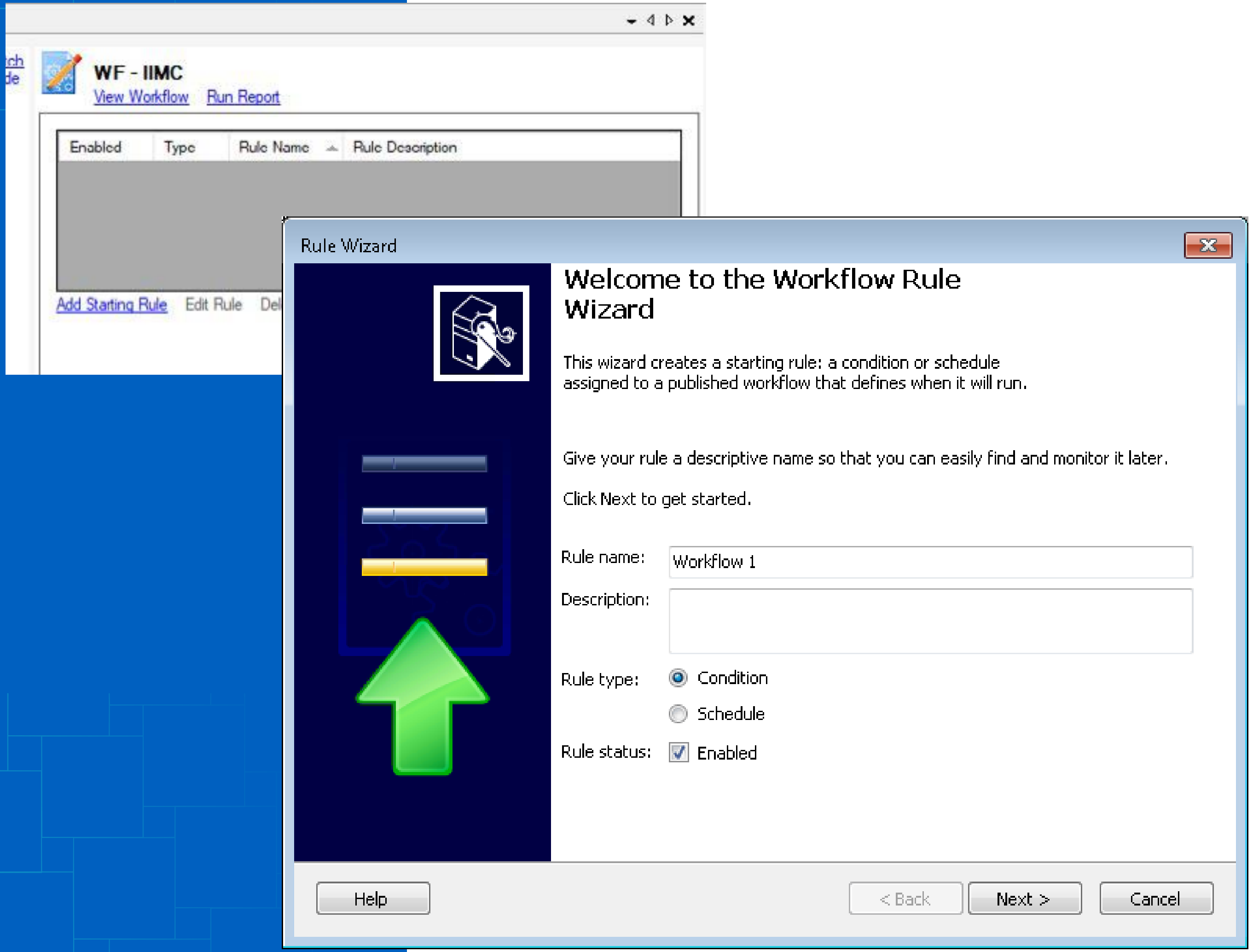


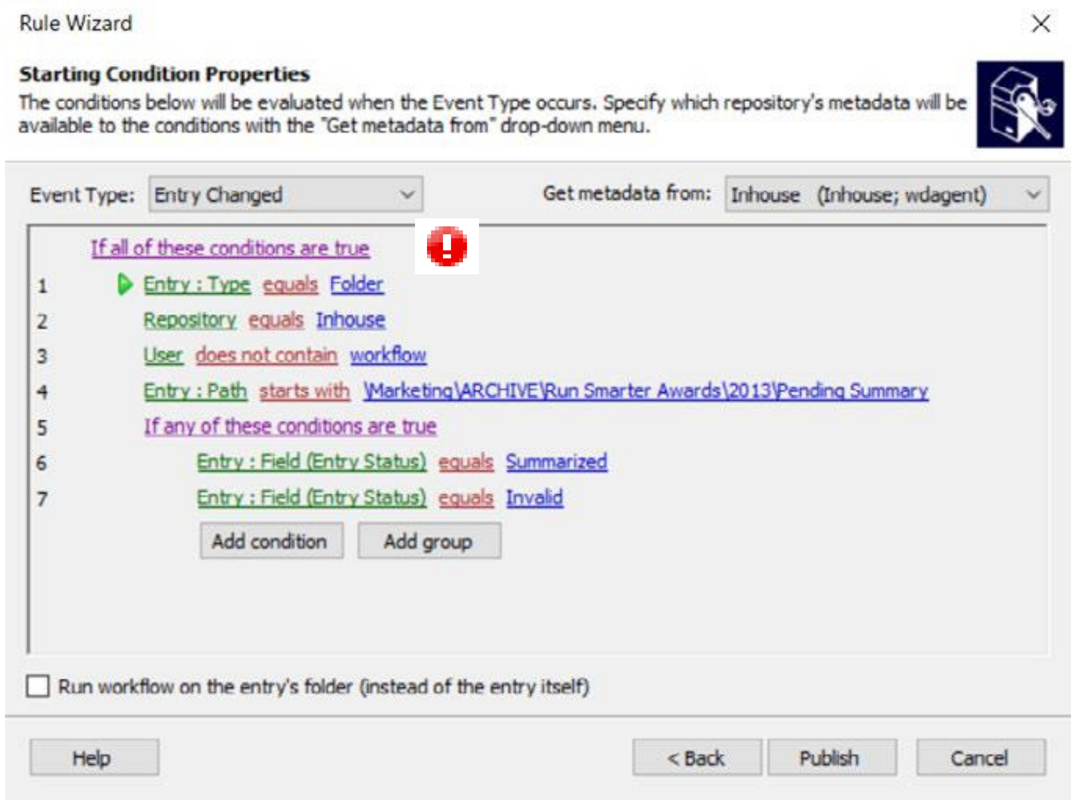
Workflow Parameters



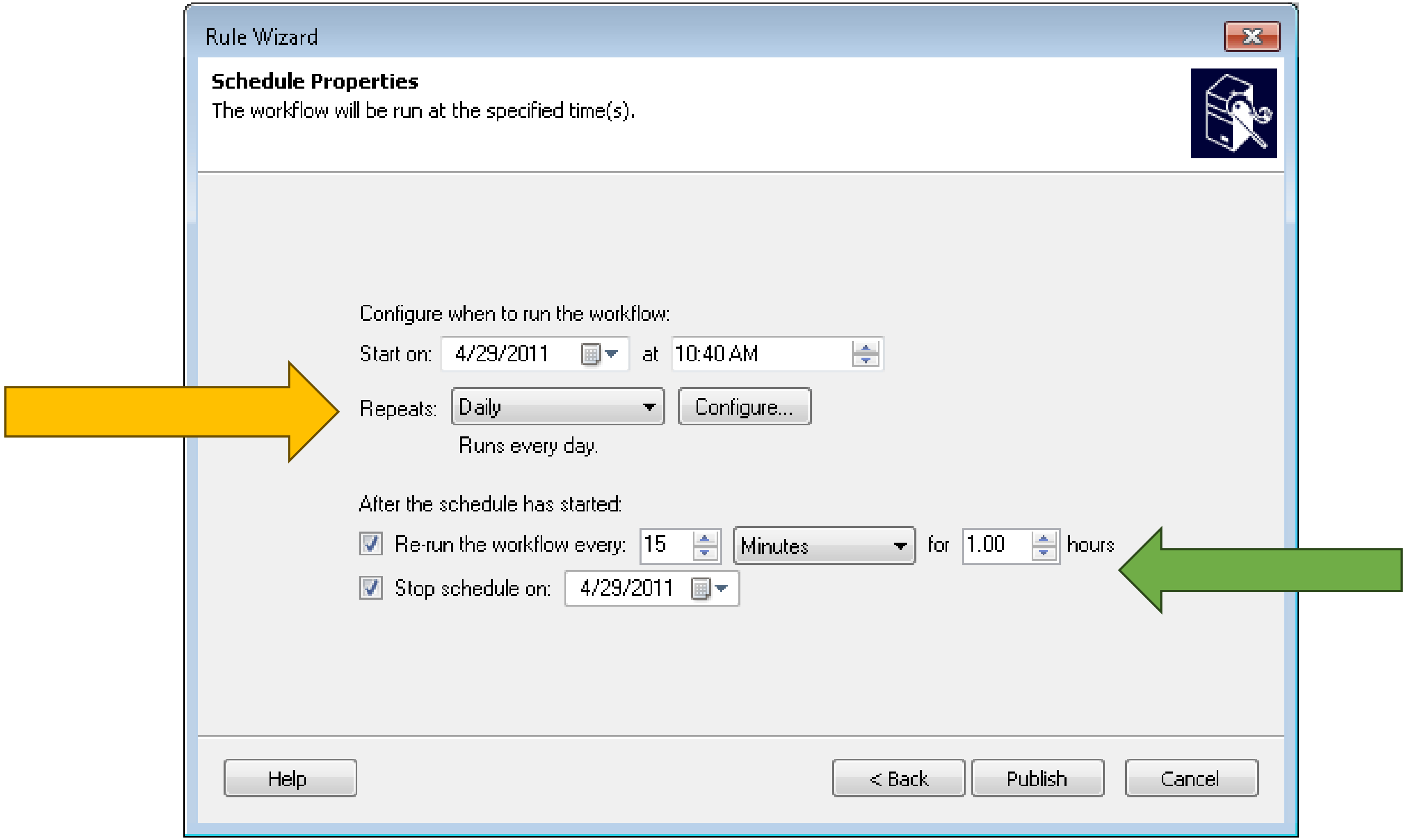


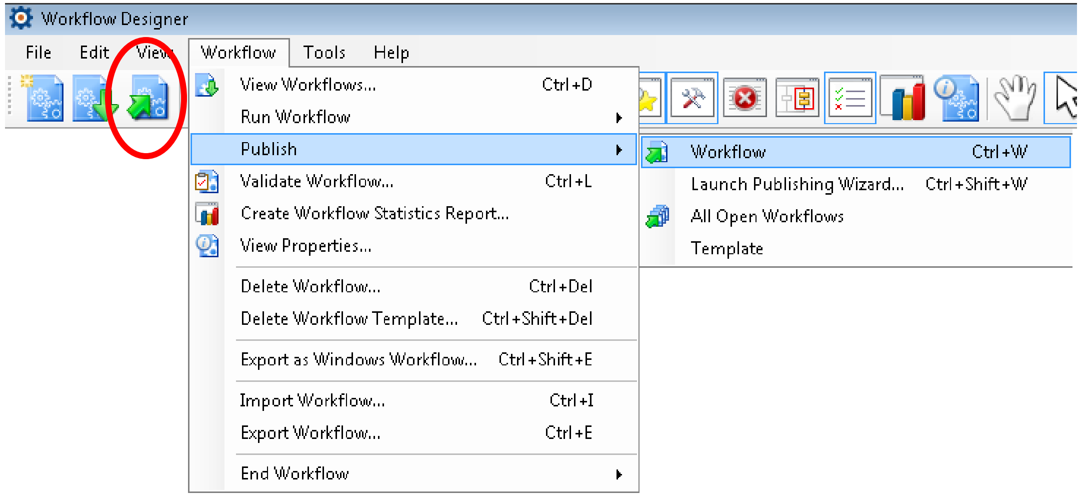
Starting Rules – Condition

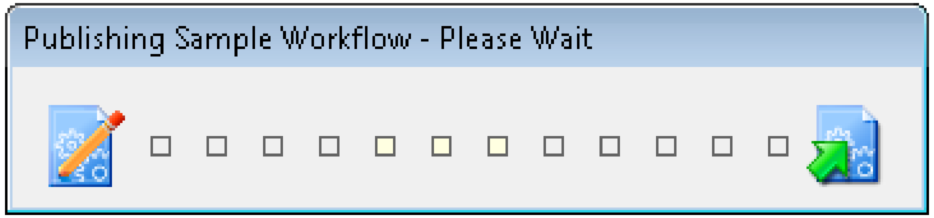


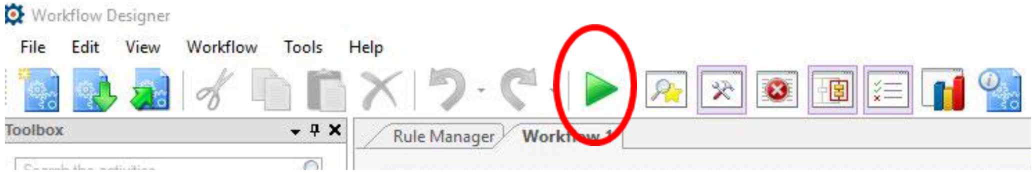


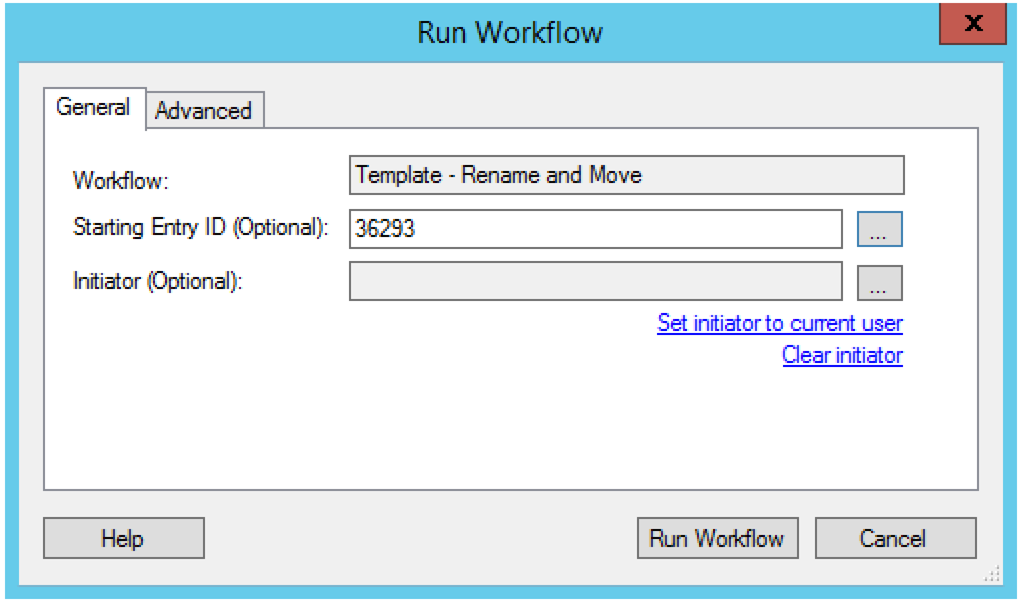
Starting Rules – Schedule





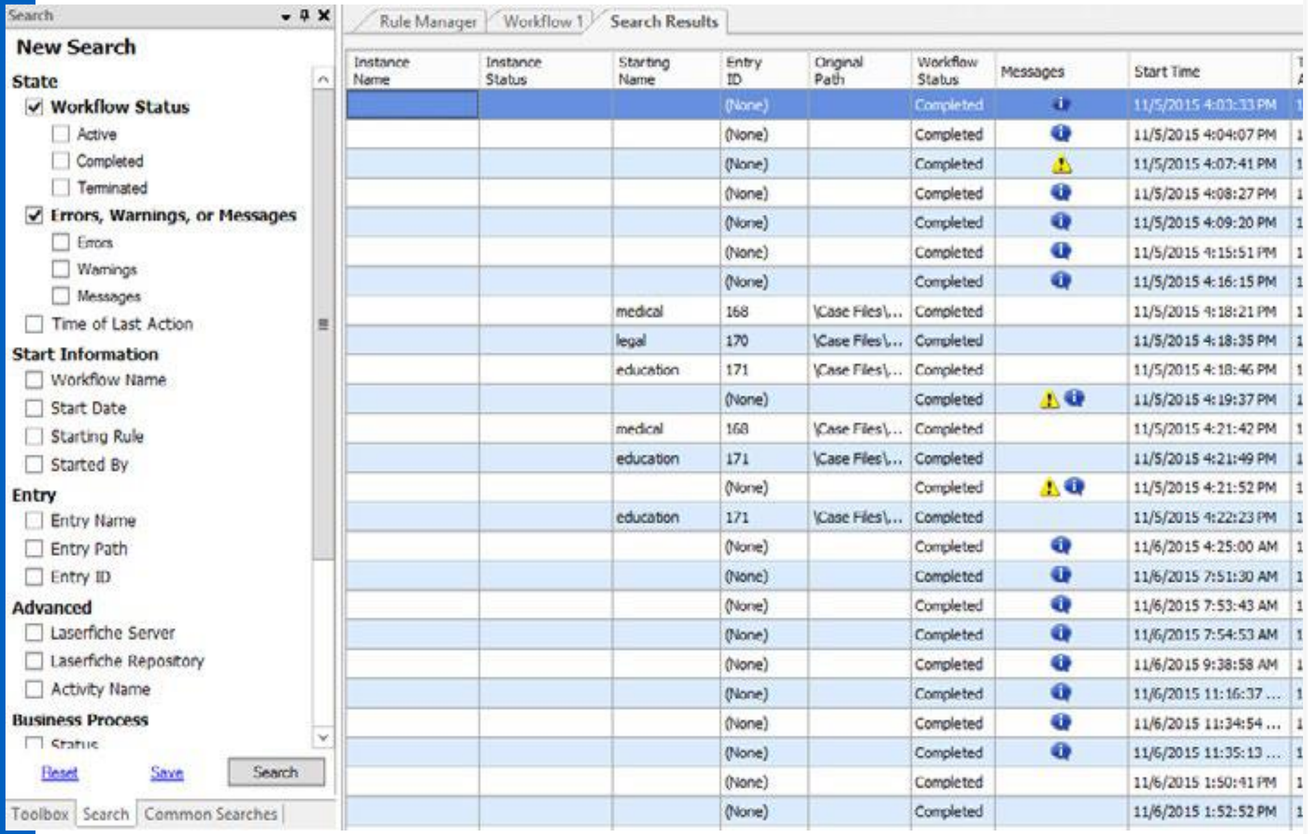


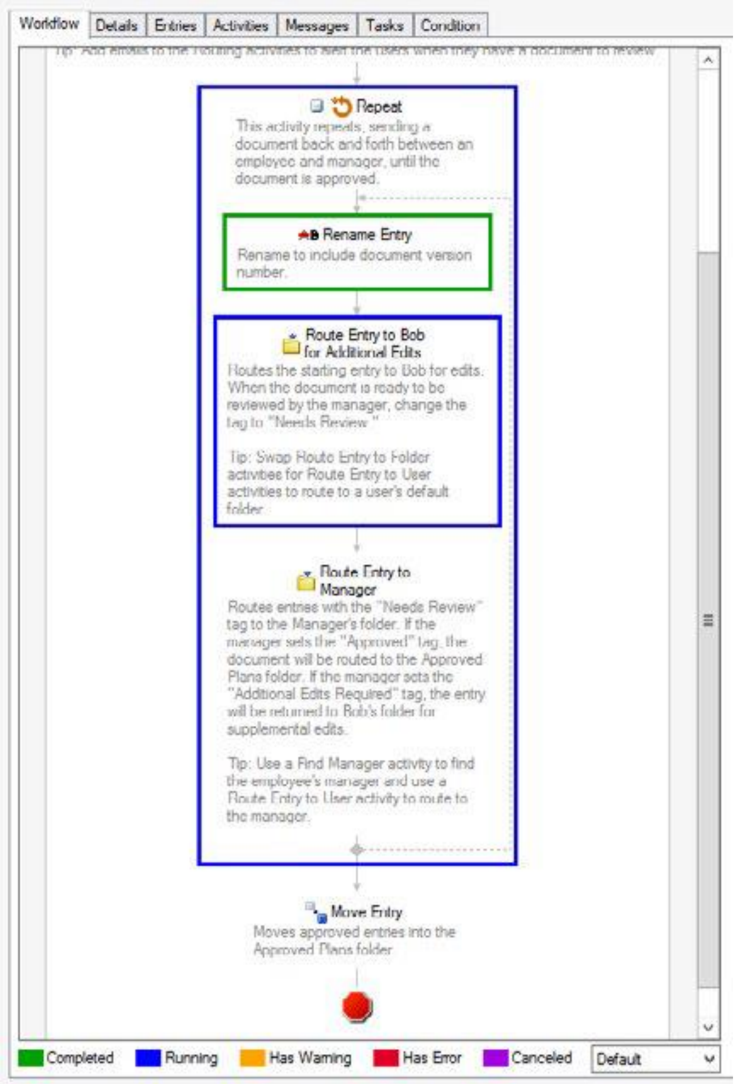




Publishing and Testing

Search Workflow Instances





When to use Workflow

Examples of Workflow

You wish to create a workflow that will move and rename a document to a student’s cumulative folder based on metadata values.

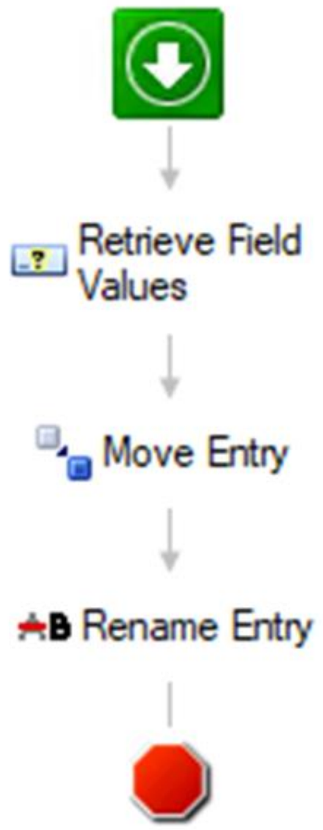
Example #1

Activities Needed:

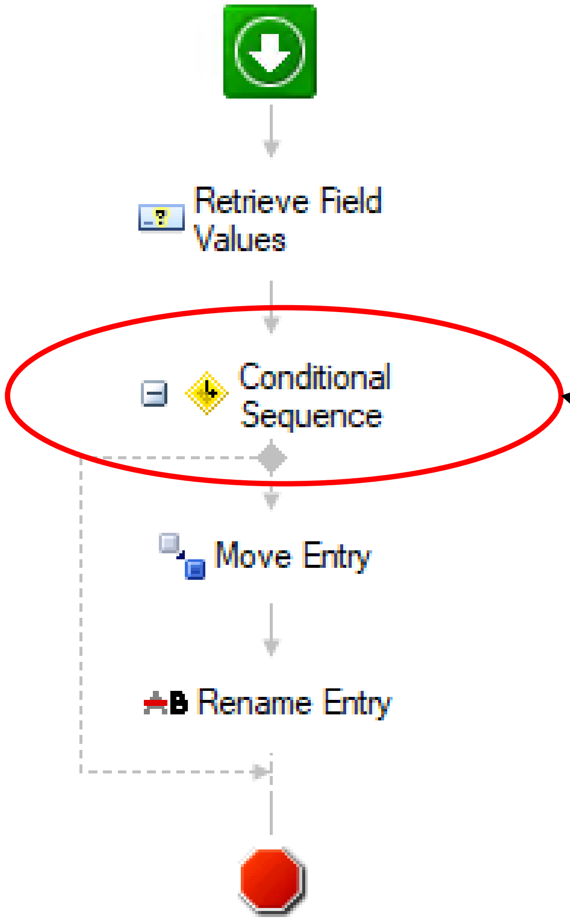
01 Retrieve Field Values

02 Move Entry

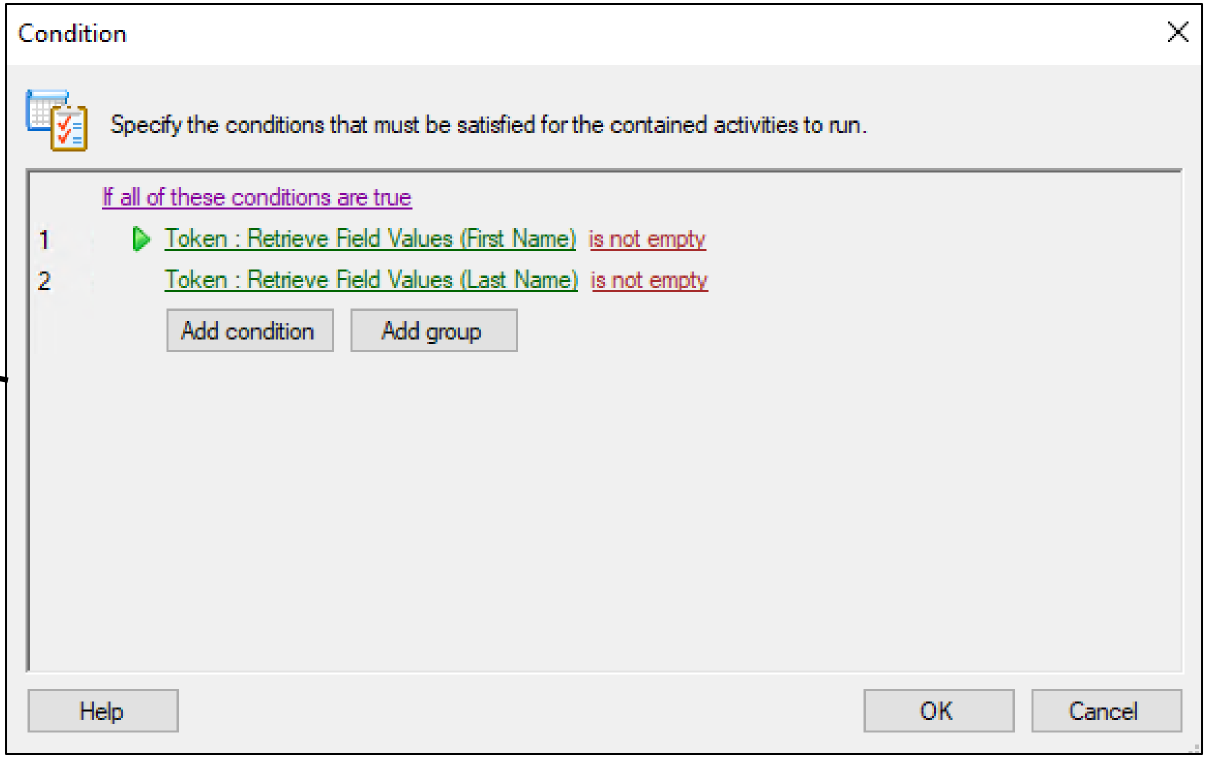
03 Rename Entry



Answer:



Retrieve Field Values
Conditional Sequence
Move Entry
Rename Entry



Condition
Specify the conditions that must be satisfied for the contained activities to run.
If all of these conditions are true
1 Token : Retrieve Field Values (First Name) is not empty
2 Token : Retrieve Field Values (Last Name) is not empty
Add condition
Add group
Help
OK
Cancel

You wish to create a workflow that will find all documents of a given document type and insert the list of results, along with some metadata, into a SQL table for later use.

If the document is already listed in the table, you want to update the existing row instead.

You also want an email when the task is complete.

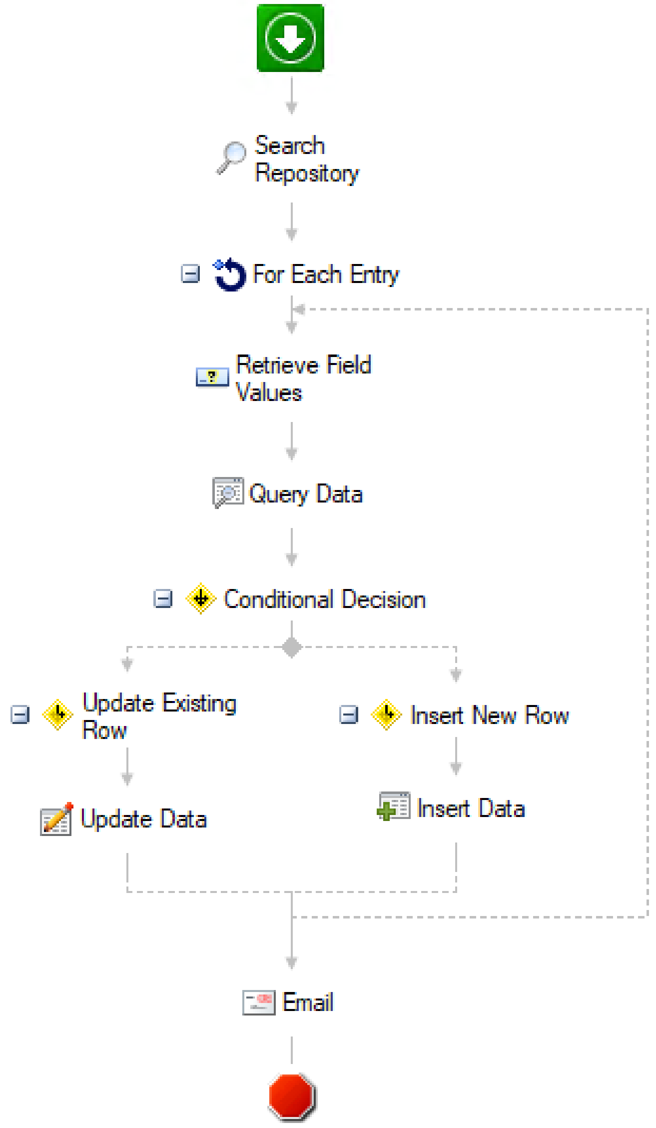
Example #2

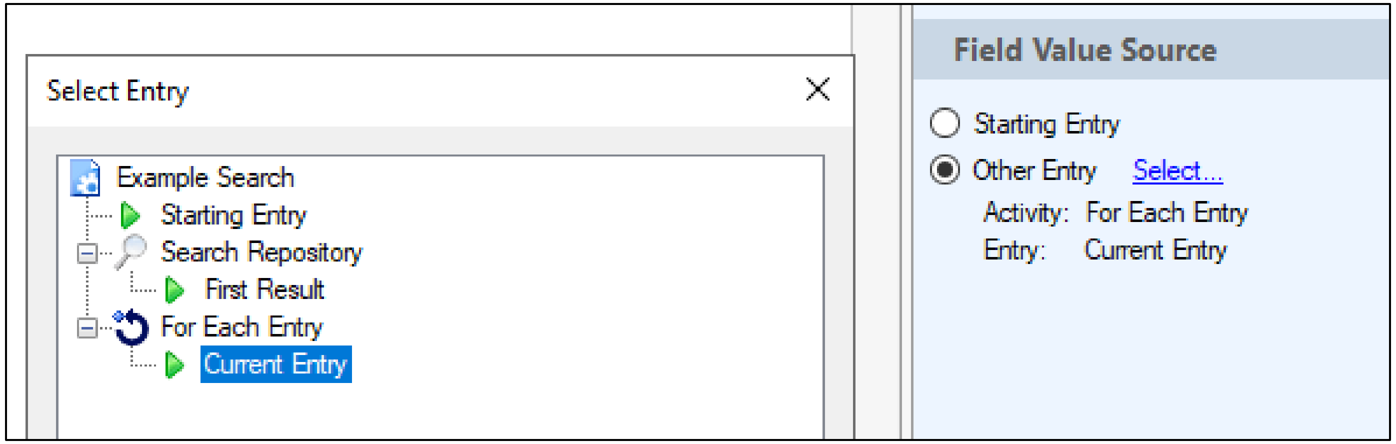
Activities Needed:

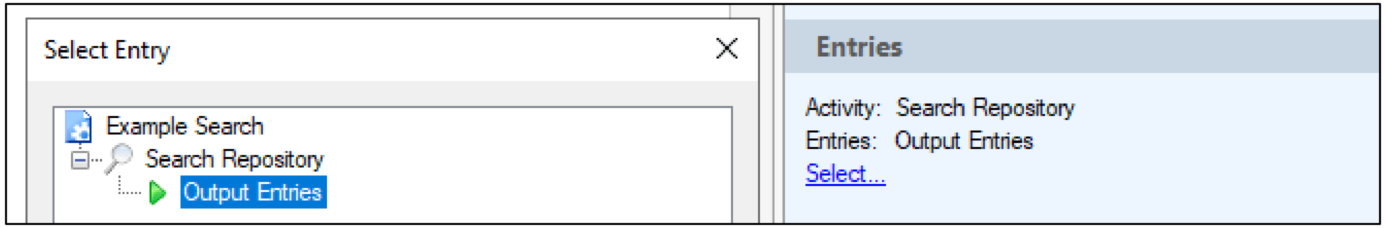
01 Search the Repository

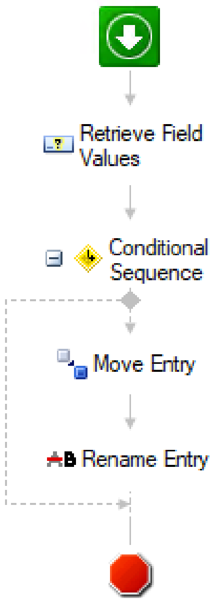
02 For Each Entry > Retrieve Field Values and Query Data to determine Update Data or Insert Data

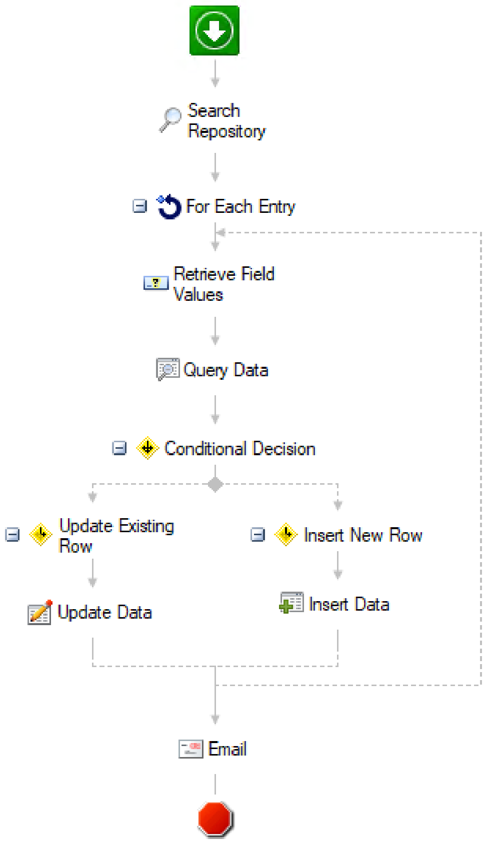
03 Email

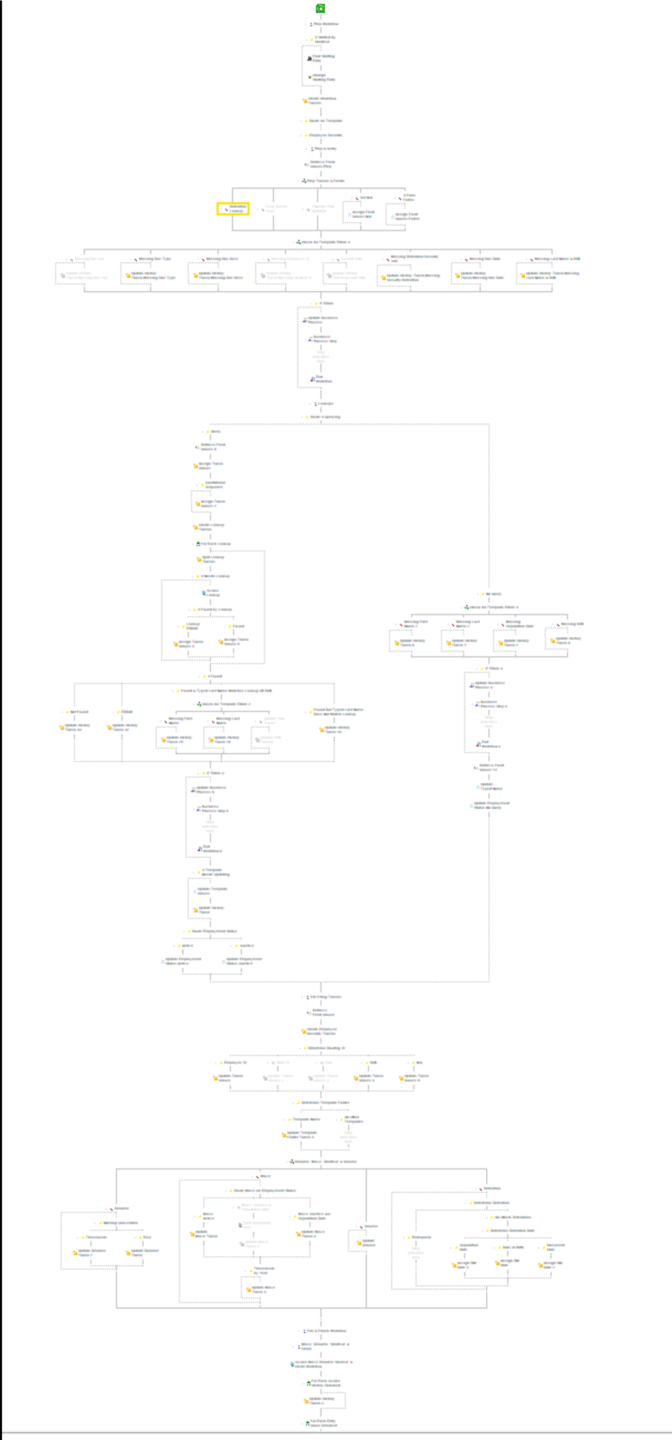

Search Repository
For Each Entry
Retrieve Field Values
Query Data
Conditional Decision
Update Existing Row
Insert New Row
Update Data
Insert Data
Email


Select Entry
Example Search
Starting Entry
Search Repository
First Result
For Each Entry
Current Entry
Field Value Source
Starting Entry
Other Entry
Select...
Activity: For Each Entry
Entry: Current Entry


Select Entry
Example Search
Search Repository
Output Entries
Entries
Activity: Search Repository
Entries: Output Entries
Select...







Expansion and Growth

Questions?

THANK YOU!

WORKFLOW 101

DocuNav SOLUTIONS