Workflow

MEET OUR

PRESENTER

Jessica Bruce
Systems Engineer III
jbruce@docunav.com

Agenda

Topics Covered:

- About
- Designer
- Tips and Tricks

About

What is Workflow?

A Business Process Automation (BPA) tool that allows organizations to design, automate, and manage repetitive business tasks by moving documents and data through a series of steps. Here are a few of the literally unlimited uses of Workflow:

- Standardize repository design by building folder structure and document naming convention
- Fill/update metadata based on 3rd party lookups (e.g. SQL, API, CSV, …)
- Automate application of retention and/or security at the document level
- Refile/remodel repository as departmental needs change
- Interact with Forms, DCC, QuickFields, and other applications in Laserfiche suite to provide them added functionality
- Export documents and data to 3rd party applications
- Create custom integrations via CS or VB scripts

Key Components

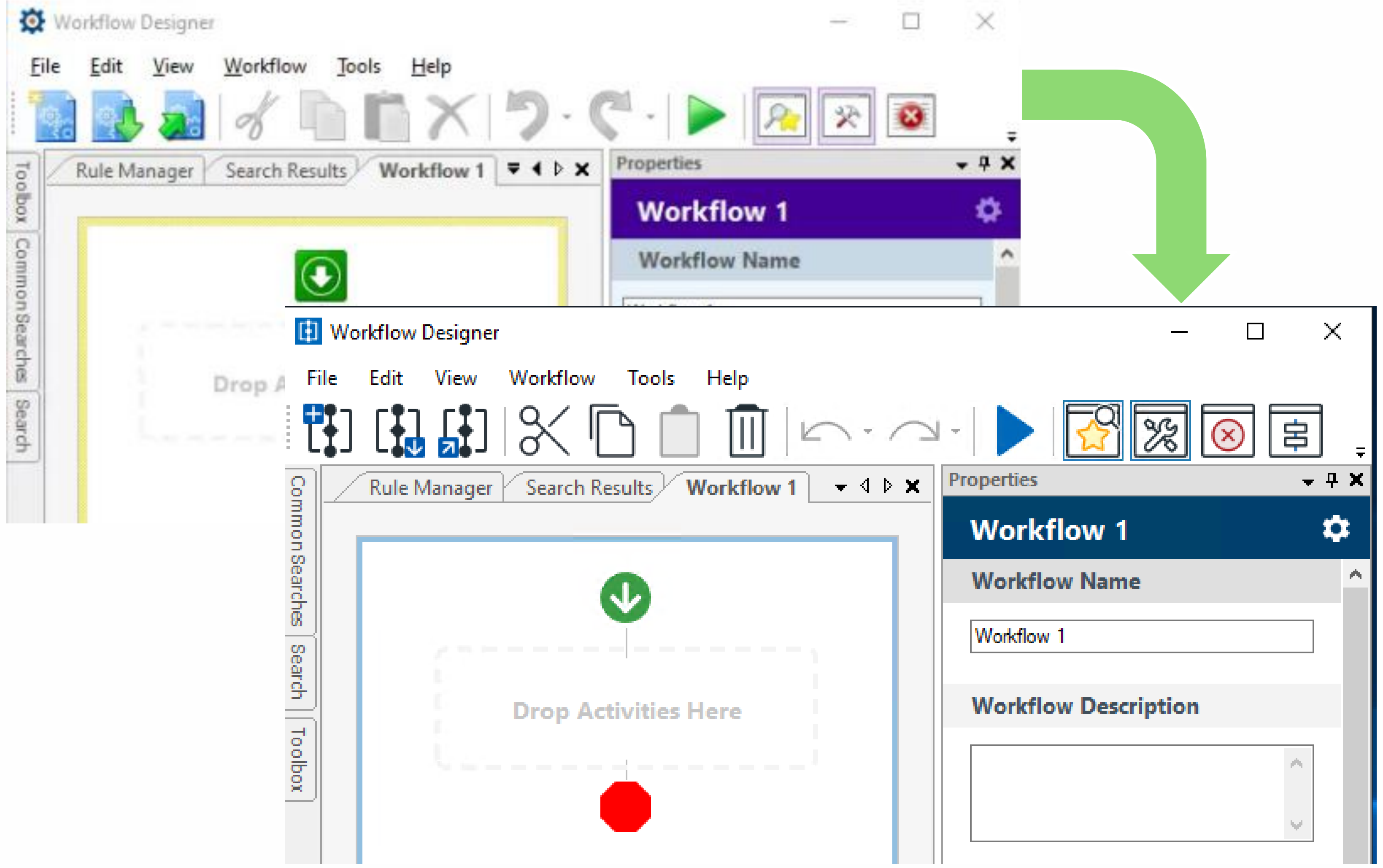
Although we call it Workflow, it is comprised of several applications & services working together to make it all possible

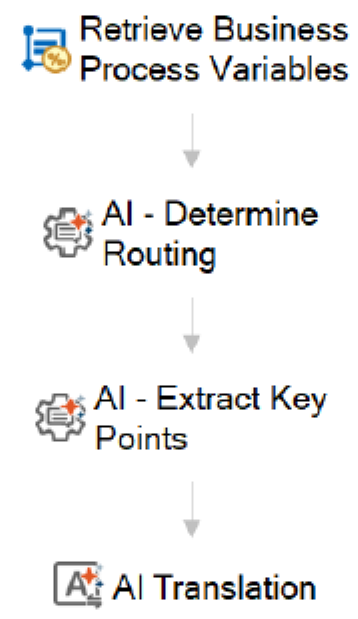
- **Workflow Designer** – User interface to create, configure, and test automated business processes called “workflows”
- **Workflow Administration Console** – Centralized interface for controlling and monitoring workflows and their connections
- **Workflow Configuration** – Base configuration of Workflow services and repository monitoring
- **Workflow Subscriber** – Service responsible for receiving, vetting, and queueing workflow requests
- **Workflow Service** – Service responsible for executing workflows triggered by Subscriber, Forms, schedule or Laserfiche Client

What’s New in 12

New in Workflow 12

- Updated design





New in Fall 2025 Release

- AI Activities to connect and call AI services

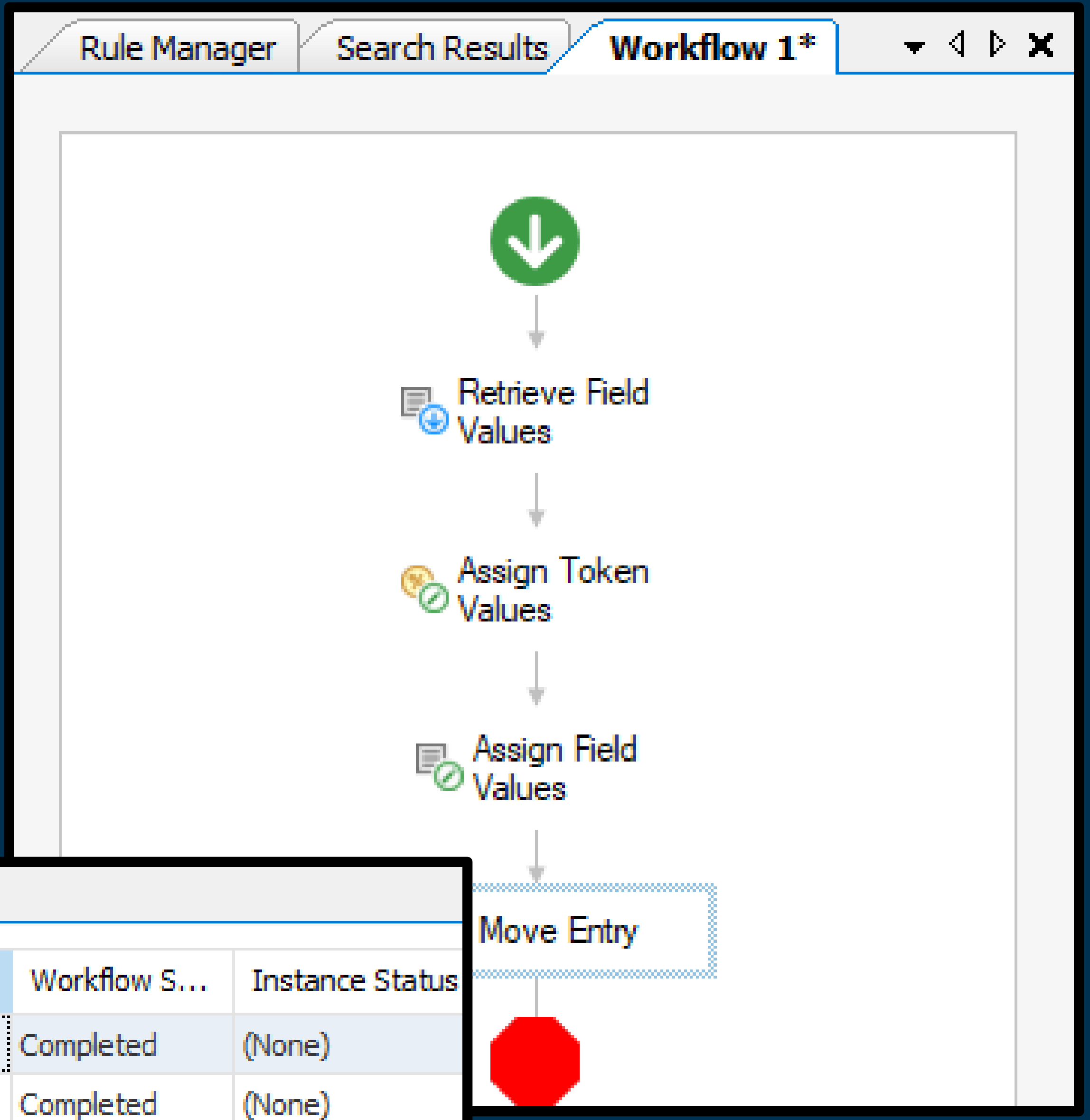
Designer

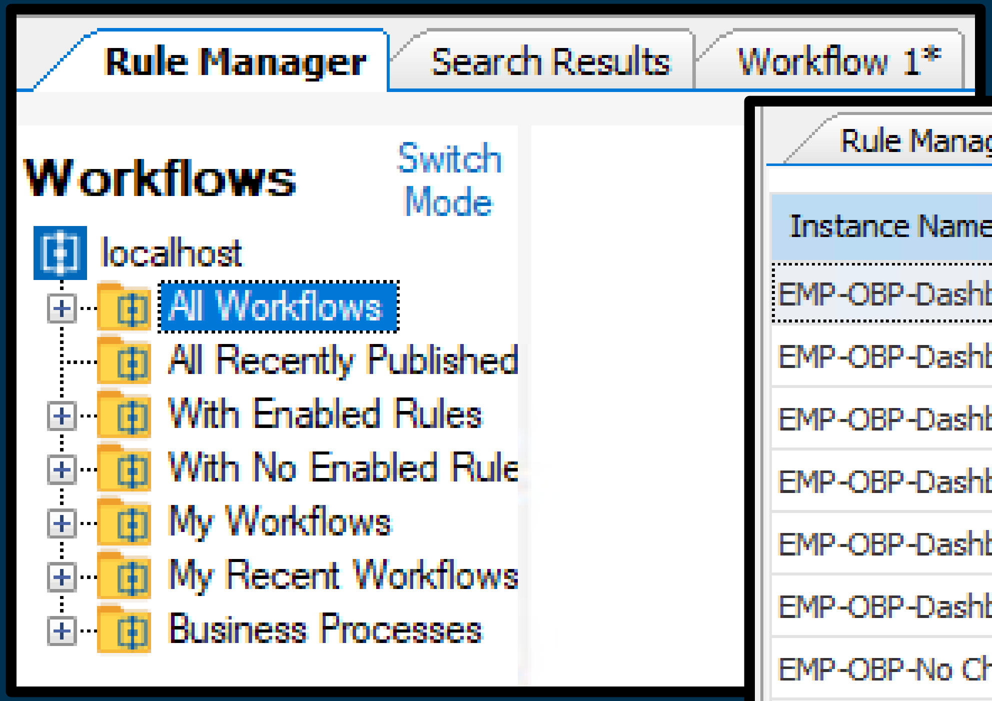
Key Tabs

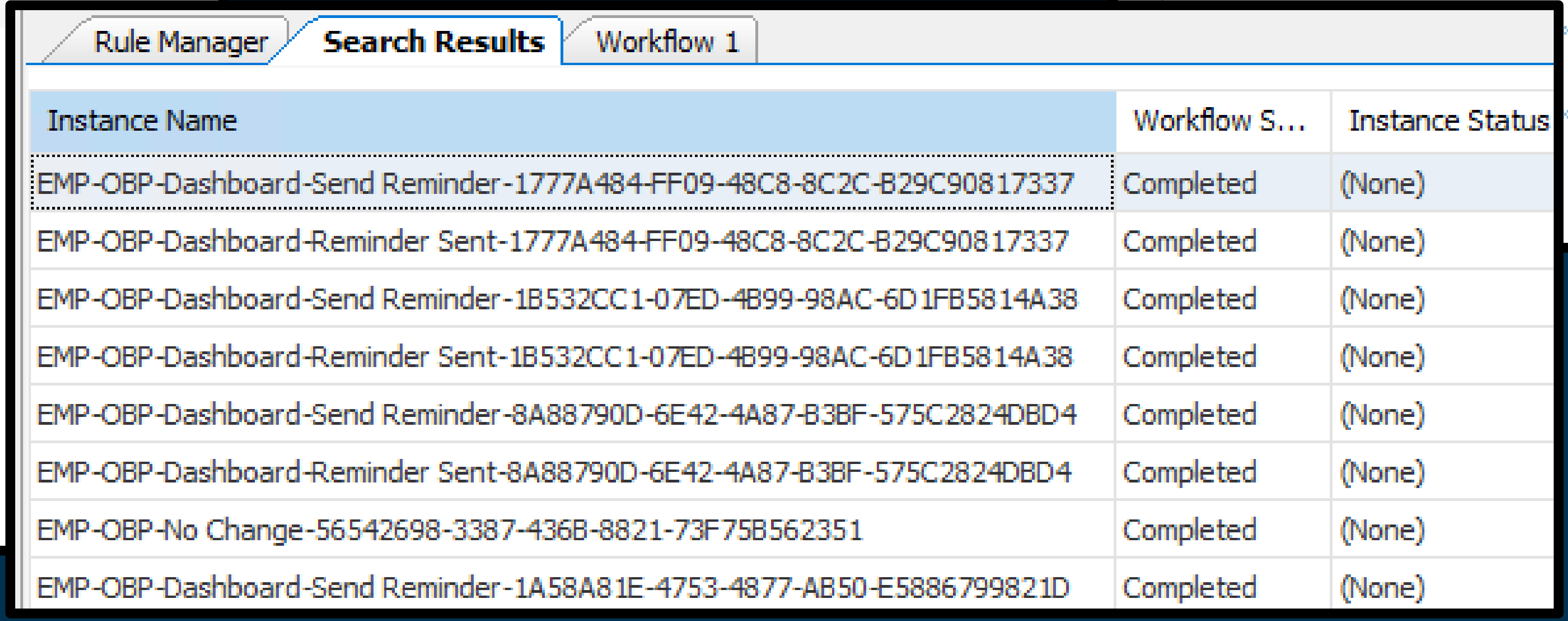
- Rule Manager – List of workflows configured on the server pre-grouped into folders

TIP: Create folders to group Workflows used by processes (e.g. Employee Filing)

- Search Results – Results of a search run via the *Search* or *Common Searches* pane
- Workflow – Area to design workflow







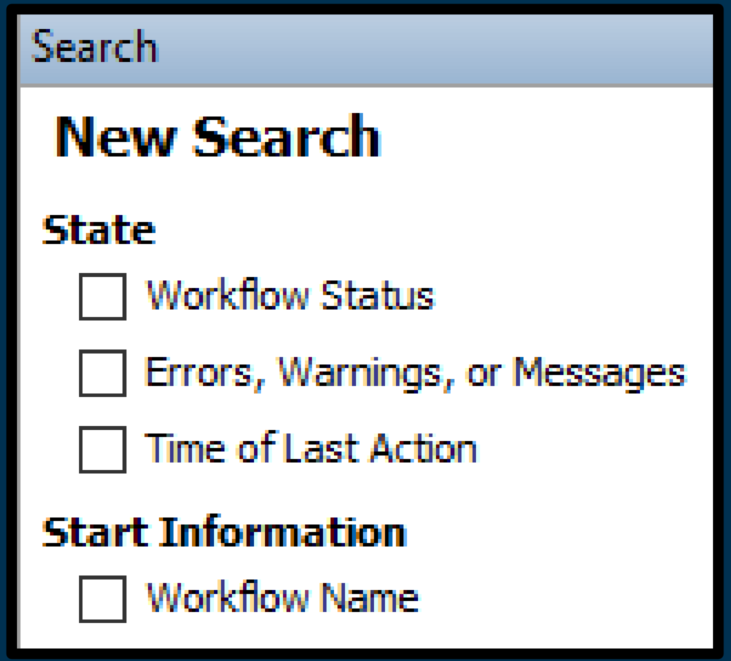
DocuNav SOLUTIONS

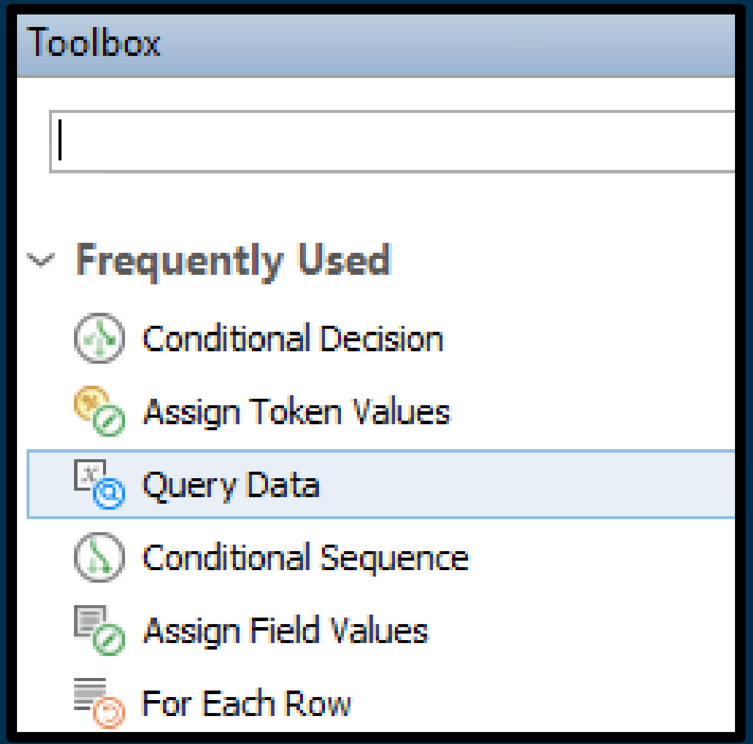
Key Panes

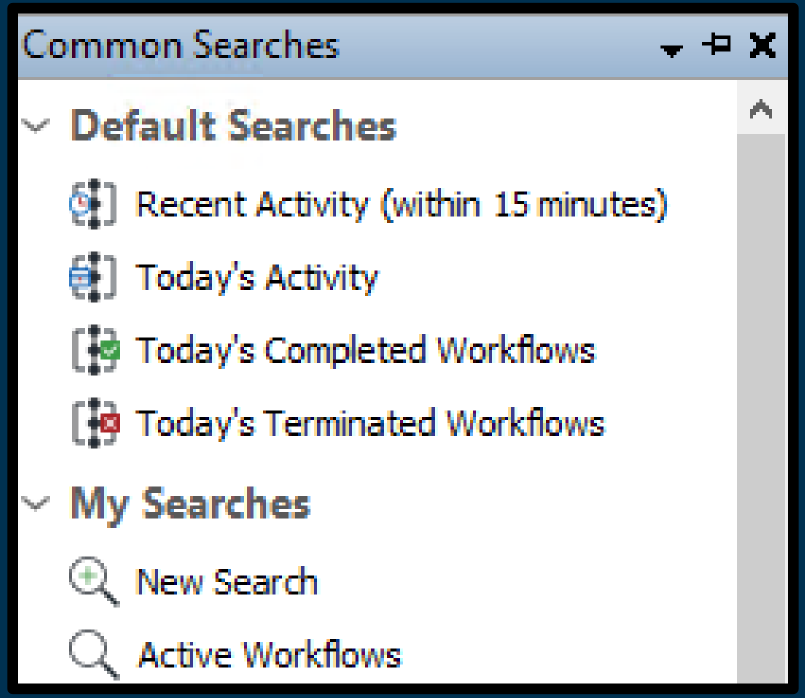
- Search – Create custom searches of workflow history
- Common Search – Run pre-built or saved searches of workflow history

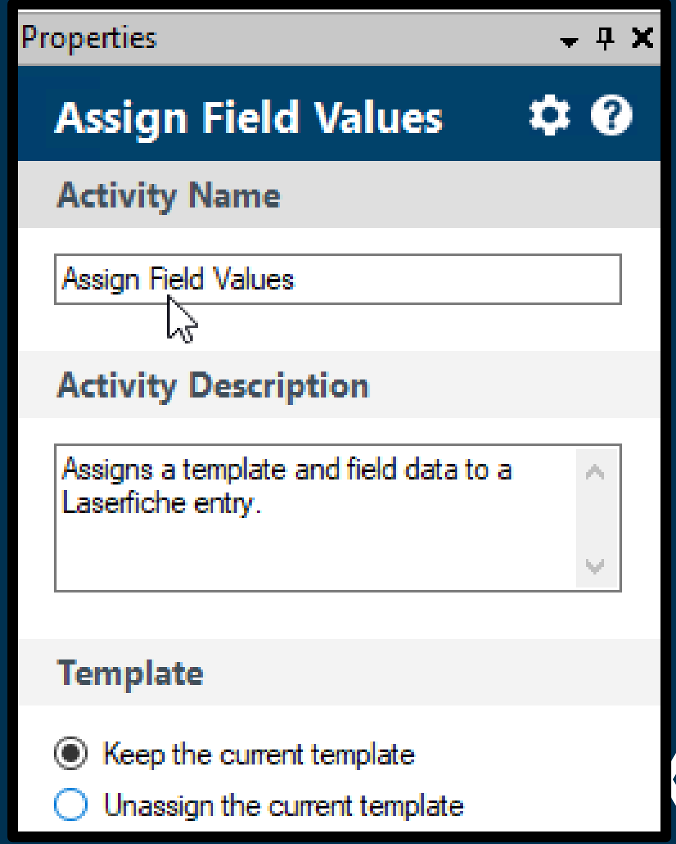
TIP: Create a saved search for "Active Workflows" so you can always quickly see what is currently running.

- Toolbox – Activities available to be used in *Workflow* tab
- Properties – Details about activity added to *Workflow* tab









DocuNav SOLUTIONS

Types of Workflows

- **Primary** – Triggered workflow that performs primary logic while calling functional workflows to handle lookups and updates
  - E.g. Workflow triggered when a new employee document is created
- **Functional** – Workflow designed to be called by multiple primary workflows to perform repeatable tasks
  - E.g. Employee Data Lookups, Applying Retention/Security, Moving/Renaming, …
- **Temporary** – One-time workflow built to handle a short-term requirement
  - E.g. Refiling employee documents when a Document Type is changed to a new value

TIP: Name these starting with "zzTEMP-" so they are always at the bottom & you remember they are not critical.

- **Scheduled** – Workflows running on a schedule to perform recurring tasks/updates
  - E.g. Nightly workflow to update employee metadata on filed documents

Workflow Triggers

Starting Rules

- Conditional – Triggered by an even
  - Created – When a new document is created
  - Changed – When an existing document is changed (e.g. Metadata update)
  - Moved – When an existing document is moved
- Scheduled – Triggered based on a schedule
- Business Process – Triggered within client by running business process

TIP: In your Conditional Start Rules, don't forget to prevent Workflow from triggering its own change rules

Other

- Manual – Testing via Workflow Designer
- Forms – Called from a Form process
- API, SDK, … - Called via other integrations

DocuNav SOLUTIONS

Designer Walk-Through

Build a basic Workflow that will:

- Retrieve a document’s metadata
- Create a token
- Update the document’s metadata
- Rename the document
- Move the document

Build a basic start rule that will:

- Trigger when a document is updated

Test workflow and search for results

Tips and Tricks

DocuNav SOLUTIONS

Workflow Planning

Prior to building a workflow, it is critical to plan entire process. While the questions depend on the request, some key questions to ask are:

Project Questions

- Who are my key stakeholders?
- When is this needed by?
- What is the end-user's overall goals to be accomplished by this process?
- Is this tied to any other processes?
- Will this involve UAT?
- Will other resources be needed (e.g. SQL dba, vendor, …)?

Workflow Questions

- What type of documents are we working with?
- Are there any 3rd party lookups?
- What security and retention should be applied?
- What is triggering this process?
- What effect will this have on the existing environment (e.g. SQL, Workflow, Laserfiche, …)?

Design Tips

Run via Designer Until Live

Do not worry about start rules until you are ready to do UAT/go live. During testing, run all testing via the "Play" button in designer

Monitor Start Rules

Once you feel comfortable, utilize Subscriber Tracer and Live Event Viewer to see what start rules are/are not triggered by documents

Build in Test Environment

Whether in dev or prod, always build so that you do not affect production and so end-users do not know you are even building in the system.

Start Small & Grow

Start your workflow with one activity (e.g. Rename) and get that working. Keep adding a new activity, testing and getting each working before adding another. Do not try to tackle the whole workflow from the start.

Resources

DocuNav

DocuNav Training

DocuNav Webinars

DocuNav Support

Laserfiche

Laserfiche Help Files

Laserfiche Support Site

Laserfiche Answers Site

Laserfiche Aspire Videos/Training