

FOIAXpress

Workflow Composer (eFLOW) Guide

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FOIAExpress v11.11.0 Workflow Composer (eFLOW) Guide

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1 Getting Started with the Workflow Composer (eFLOW)

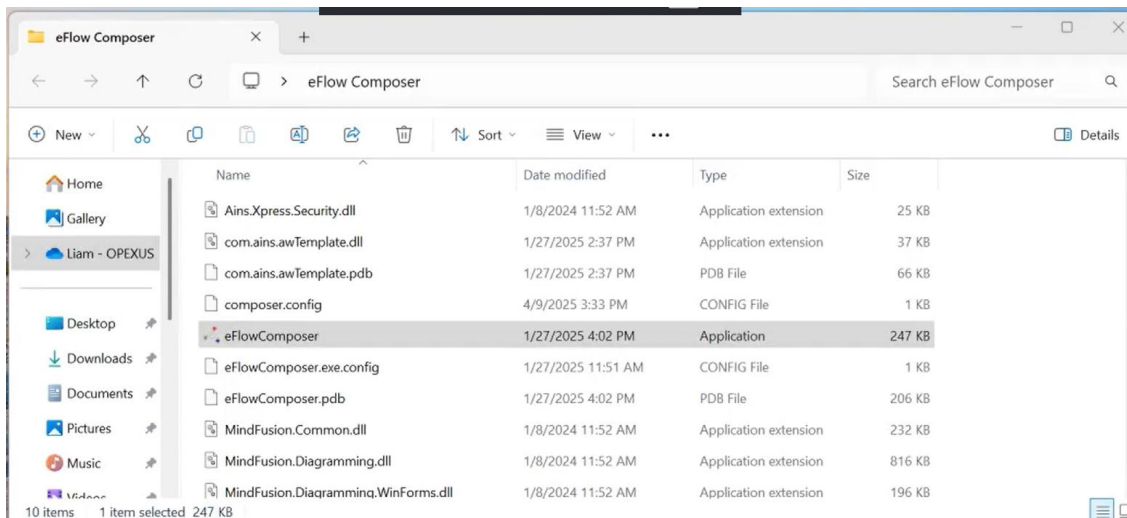
The Workflow Composer is a tool used to design and manage workflows within FOIAXpress. By following this guide, users can effectively set up, configure, and streamline workflows to improve efficiency and compliance with organizational policies.

Note: Workflows impact users' permissions/access, case assignments, and case actions.

1.1 Installing the Workflow Composer

You will be provided with a ZIP file containing the executable.

1. Unzip the provided ZIP file.
2. Save the folder locally, anywhere on your workstation, or on a shared server.
3. Inside the folder, you'll see multiple files. Right click or double click on the file called *eFlowComposer* and select **Run as administrator**.



You'll be prompted by the system to enter applicable environment information such as the server IP, database name, and credentials. This allows the Workflow Composer to connect to the database.

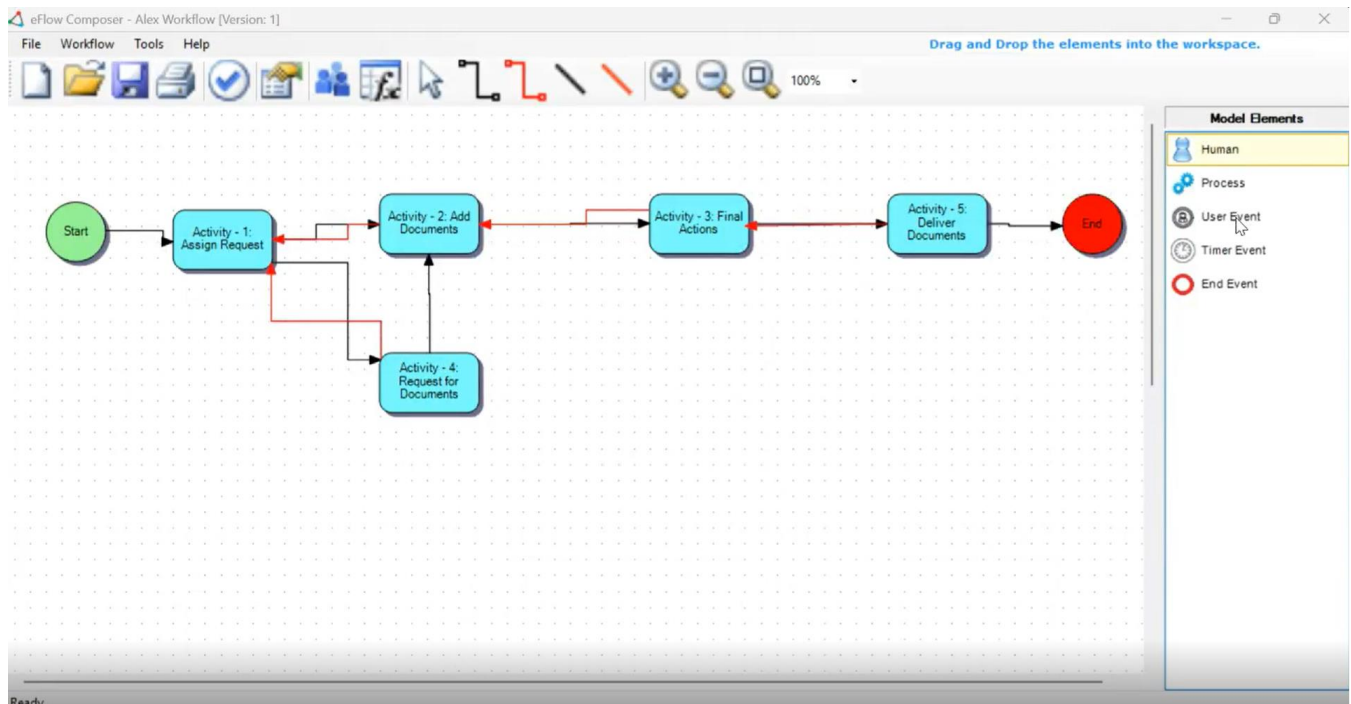


2 Using the Workflow Composer

Once the eFLOW Workflow Composer has been installed and configured, you can begin building a workflow.

2.1 Workflow Design Interface

The workflow design interface appears as shown below. Each activity in the workflow is represented by a Model Element.



2.1.1 Model Elements

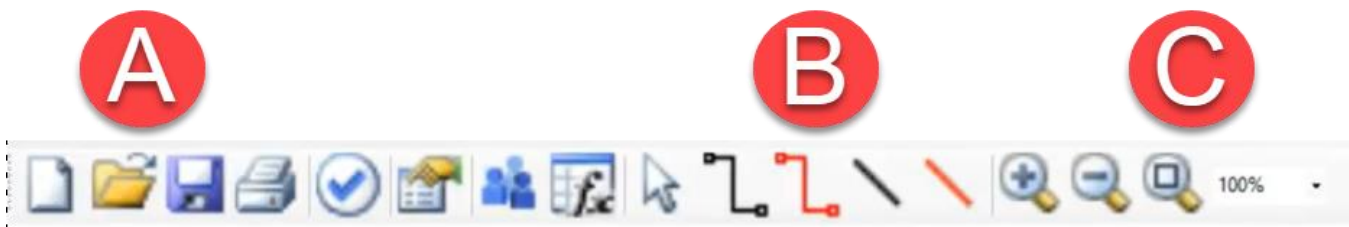
Name	Description
Human	A task that will be performed by a user.
Process	An automated process that is part of the workflow.
User Event	A user-initiated, manual action.



Name	Description
Timer Event	A system-initiated action.
End Event	An end to a subprocess within the workflow.

2.1.2 Toolbar

You can take various actions using the toolbar at the top of the screen. Key toolbar actions are listed below.



Ref	Title	Description
A	Workflow actions	Create a new workflow, open an existing workflow, or save the current workflow.
B	Connectors	Draw connections between the workflow elements to sequence activities.
C	Page View	Zoom in, zoom out, and adjust the page view.

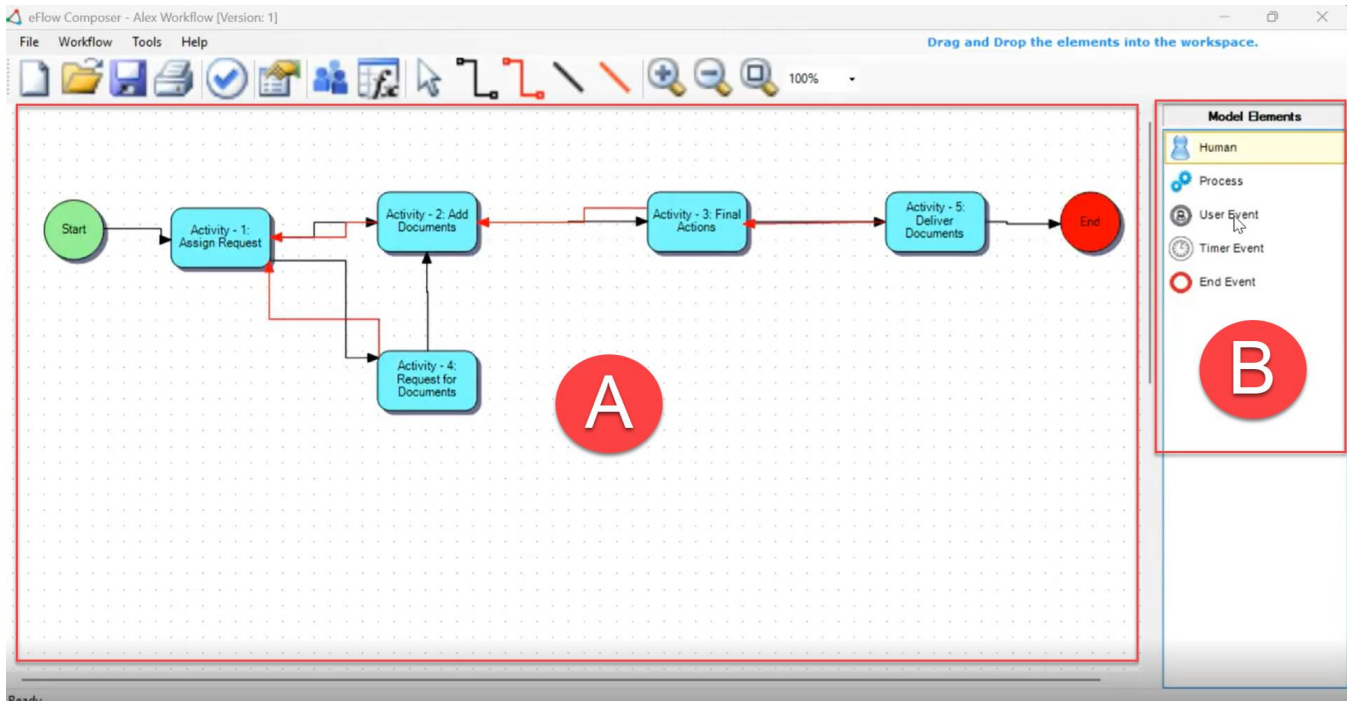
2.2 Create a New Workflow



Next, you can configure, validate, and save a workflow.

1. Open the workflow design interface.

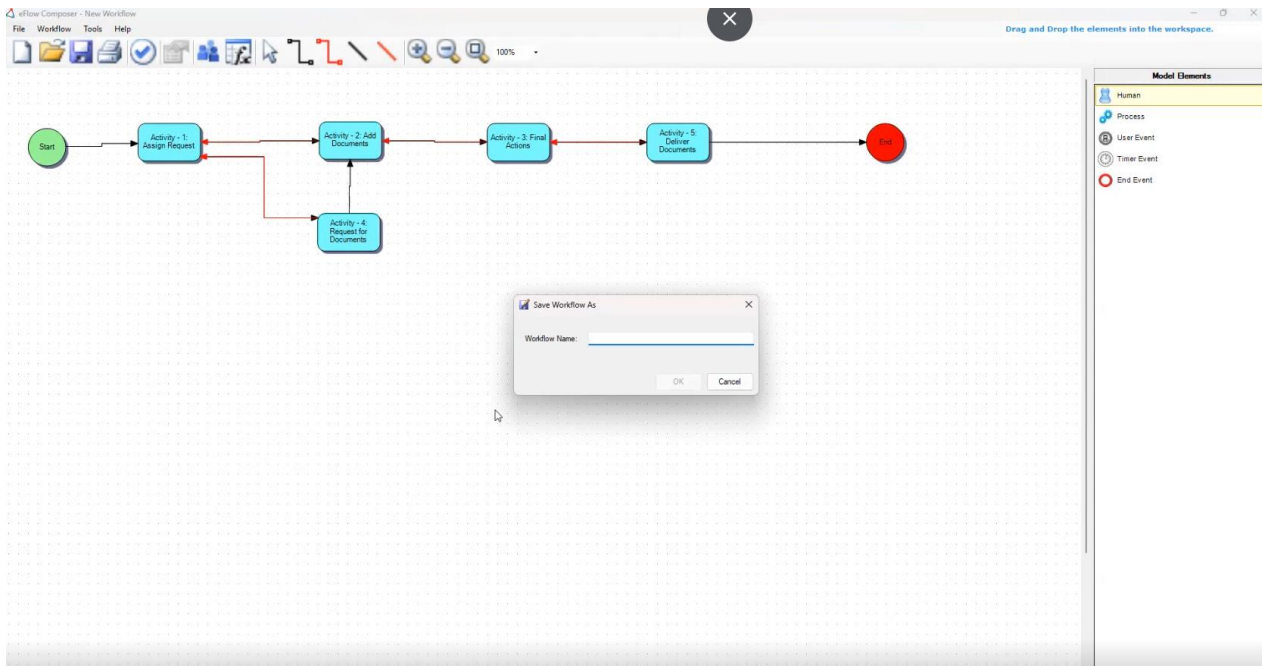


Using the Workflow Composer



2. Drag and drop (B) Model Elements into the (A) workspace.
3. Use the connector toolbar icons to connect activities in the order they should be performed. Start from the beginning of the workflow and connect each activity based on your business process.
 - a. Black lines represent forward progression. They can also be used for capturing backward movement or access.
 - b. Red lines represent rejection or backward movement.
4. Define activity properties.
 - a. Activity Name: A descriptive name for the activity.
 - b. Role/User: The role or user responsible for performing the task.
 - c. Performer Type: Select whether the activity is performed by a single user or a group.
 - d. Routing Conditions: Determine what happens when the activity is initiated or completed.
5. Once all activities are connected, click the **Validate**  icon to check the workflow. The system will check for any errors or missing configurations to ensure that the workflow can proceed from start to end without interruptions.
6. Click the **Save**  icon to save the new workflow. Add the *Workflow Name*, then click **OK**.

Using the Workflow Composer



The workflow is now saved in the database and can be added into your FOIAXpress environment.

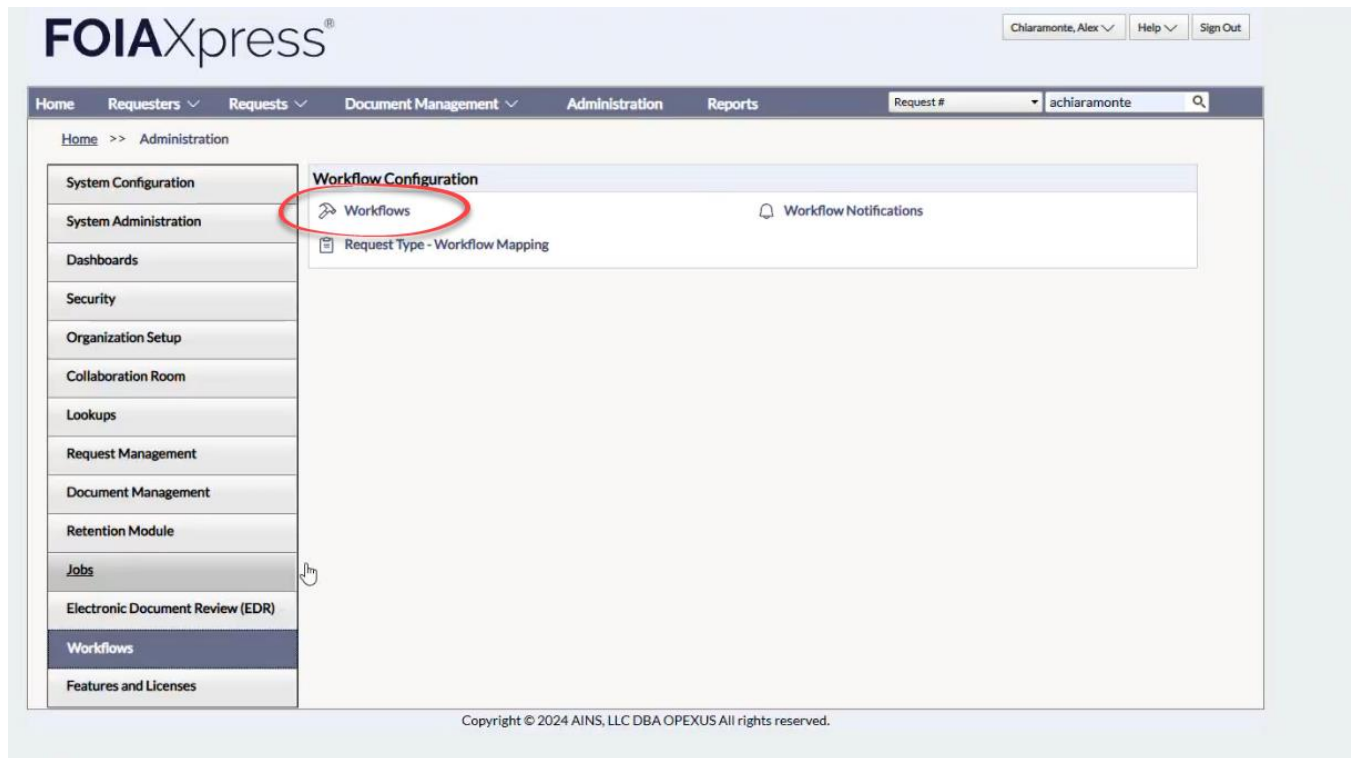


3 Applying Workflows to FOIAXpress

Once you've created the workflows in the Workflow Composer, you can apply them to your FOIAXpress environment.

3.1 Add the Workflow to a Request Type

1. Open FOIAXpress. Navigate to **Administration > Workflows > Workflows**.



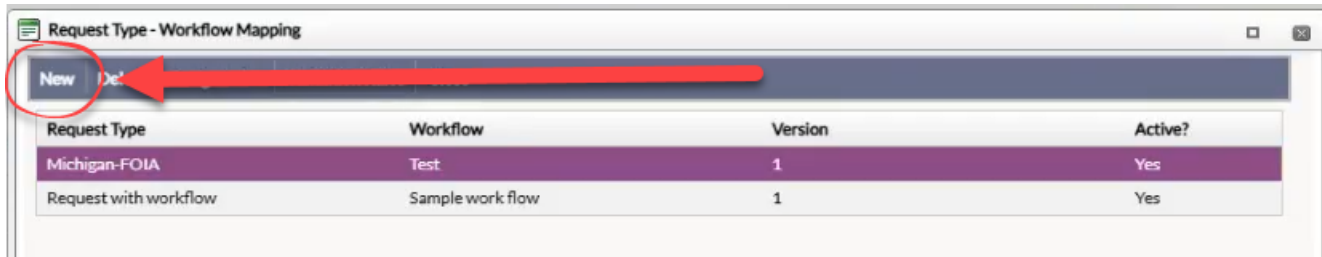
2. Confirm that the workflow you just created is present in the list.

The screenshot shows a table titled 'Workflows' with the following data:

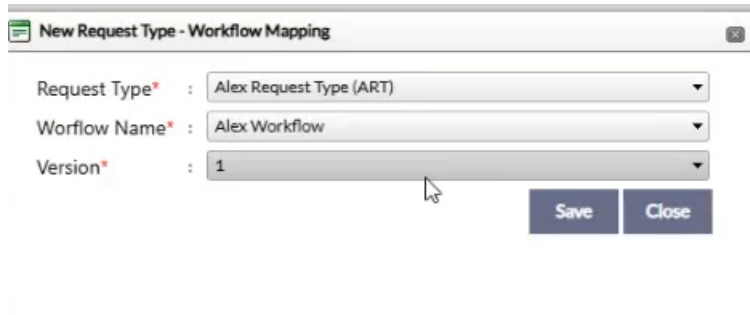
Workflow Name	Version	Active
Test	1	Yes
Sample work flow	1	Yes
Test for Will	1	Yes
Alex Workflow	1	Yes

3. Next, you'll need to apply the workflow to a Request Type. If you need to create a new Request Type, do so now via the *Request Management* Administration tab.
4. Navigate back to the *Workflows* Administration tab, then click **Request Type - Workflow Mapping**.
5. From the *Request Type - Workflow Mapping* pop-up, click **New**.



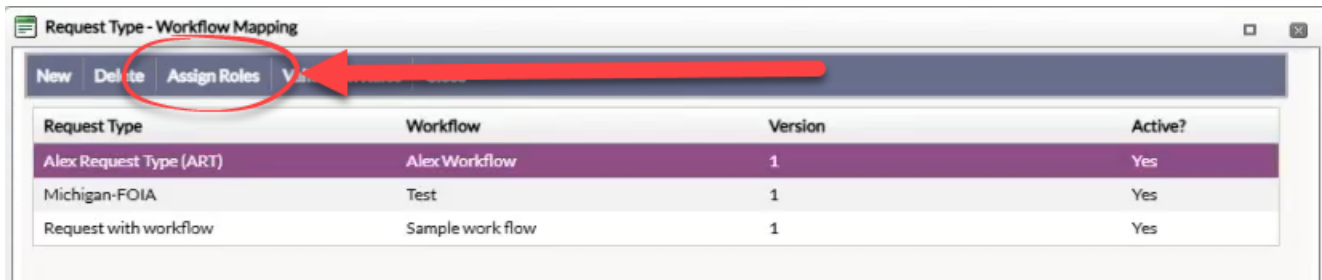


- Use the drop-down menus to select the *Request Type*, *Workflow Name* (select your newly designed workflow), and *Version*. Then, click **Save**.

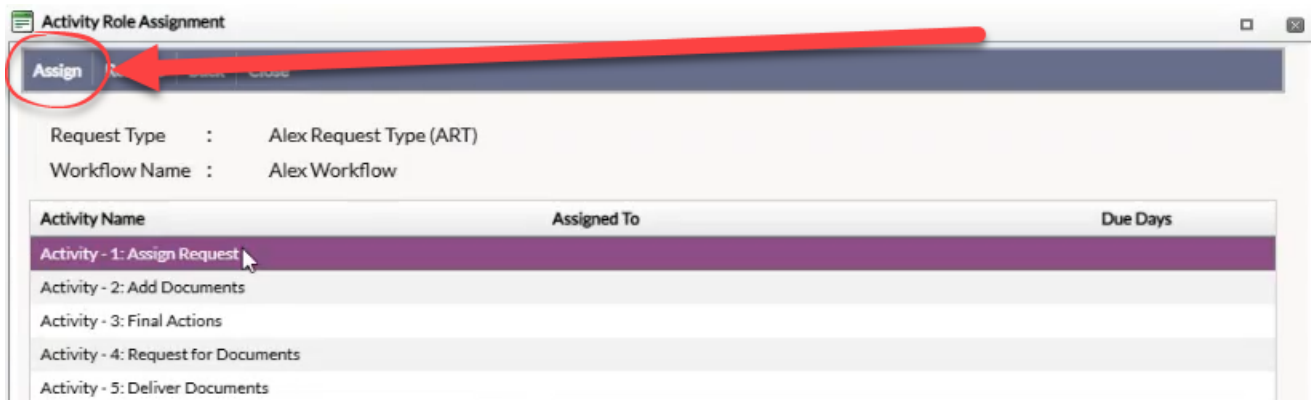


3.2 Configure Activity Role Assignments

- The next step is to configure permissions for the workflow. Make sure your new workflow is highlighted in the list, then click **Assign Roles**.



- Select an Activity from the list, then click **Assign**.



- Fill out the *Activity Role Assignment* details, then click **Assign**.



Note: Consider the permissions related to the Request Type Roles you assign for each task. The selected role must have appropriate permissions for the task as per the designed workflow.

4. Repeat this process for each activity in the list.

3.3 Understanding Workflow Control

There are two different workflow control options, standard workflow and custom workflow.

- **Standard Workflow:** Follows the default process in the system, allowing users to perform actions freely.
- **Custom Workflow:** Uses the Workflow Composer to define specific steps and control the flow of activities. In a custom workflow, activities are controlled so that users can only perform actions when the previous activity is completed. However, the current implementation does not tightly couple workflow activities with system permissions, meaning users may still see all available actions based on their permissions.

4 Best Practices

Consider the following best practices when using the Workflow Composer:

- **Documentation:** Maintain detailed documentation of workflows and roles for future reference and troubleshooting.
- **Testing:** Thoroughly test workflows before deploying them in a production environment.
- **Permissions Management:** Regularly review and update user permissions to align with workflow changes.
- **Common Issues:** Check for missing roles, incorrect database configurations, or improperly connected activities.

