Business Process Management (Workflows) Using Synergy
Workflow Is:
Workflow is Communication
Workflow Is:
Workflow Can Ensure that Business Processes are Completed According to Corporate Policies and Procedures
What Departments Can Use Workflows?

Workflow Processes can Mimic any Policies or Procedures (Processes) that You have Within Your Organization:

✓ Sales – Account Management, Opportunity Tracking
✓ Marketing – Trade Shows, Marketing Campaigns
✓ Customer Service – RMAs, Customer Inquiries
✓ Accounting – New Account Set-up, W-9s from Accounts
✓ Inventory Management – Tracking Shipments
✓ Purchasing – Purchasing Requisition Process
✓ Production – Non Conformance, Corrective Actions
What Departments Can Use Workflows?

Workflow Processes can Mimic any Policies or Procedures (Processes) that You have Within Your Organization:

✓ Research & Development – New Products
✓ IT – Support Calls & Assistance
✓ Quality Management – ISO or Other Initiatives
✓ Human Resources – Staff Training, Expense Reporting, Reviews
✓ And This is Just a Sample
What is Workflow Using Synergy?

- Workflow are Tasks Which are Assigned to a Resource / Role (Group of Employees)

- A Workflow Task May be Created by the Resource for Themselves to Complete (such as a Post-It Note Reminder)

- A Workflow Task May be Created by a Resource for Another Resource (or Role) to Complete

- A Single Workflow May Have up to 4 Steps
What is Workflow Using Synergy?

- Additional (Unlimited) Steps Through the Creation of New Requests May Be Added Using the Event Manager or Rules Engine, and Bringing Field Values to New Requests

- Workflow Should be Considered Tasks that Need to be Completed And Tracked

- Workflow Can Have Multiple Steps (Created, Open, Approved, Realized, Processed, Draft or Rejected) that may have (Customer Defined) Descriptions for the Steps

- Workflow Can Involve Multiple Resources
What is Workflow Using Synergy?

✓ Workflow Can Involve Roles instead of Resources

✓ Workflow Can Have Optional and Required Fields at Different Statuses

✓ Workflow Fields May be Dependent Upon Other Fields in Request

✓ Workflow Can Show Different Information at Various Stages

✓ Workflow Can Be Made Private (Just Between Participants)
What is Workflow Using Synergy?

✓ Workflow Can Be Linked to Resources, Accounts, Contacts, Projects, Documents, Requests, Items, Opportunities or Assortments

✓ Workflow Can Have Security Levels Assigned

✓ Workflow Fields May Include Drop Down or Searchable Fields for Entry of Validated Data

✓ Workflow Data Can be Used in Reports and Views
What is Workflow Using Synergy?

✓ A Workflow Task May be Created by the Event Manager or Rules Engine for a Resource to Complete that is Based upon Logic Based Rules and Events / Non-Events Occurrence in any SQL Database or Tables

✓ Workflow Can Be Linked to Previously Created Workflow Requests

✓ Workflow can include Additional Action Steps such as Assume, Assign, Reject, Reopen and Delete
What is Workflow Using Synergy?

✓ Reporting can be Done on Workflow Request Types and Individual Fields

✓ A Workflow Task May be Created Using a Process Flow for Linear Business Processes

✓ Values from Multiple Workflow Tasks May be Combined by the Event Manager or Rules Engine to Create a New Workflow Request
Workflow Process #1

Gage Created as an Item

Initial Workflow Request Created

Request placed in Service Manager Workflow

Is Gage Still in Use

NO

Turn Gage to Inactive in Item Card

YES

Does Gage Need Calibration Now?

NO

Leave Request in Service Manager Workflow

Complete the Calibration Process and Workflow Request

Event Manager Action – Create New Calibration Request and Send to Service Mgr

Event Manager Action – Calculate Next Calibration Date for Item Card

Gage Testing and Certification

SynergyExpert.com

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Example of a “To Do Request”

A Workflow Task May be Created by the Resource for Themselves to Complete (such as a Post-It Note Reminder).

A Workflow Task May be Created by a Resource for Another Resource to Complete.
Example of a “To Do with Reply”

A Workflow Task May be Created by a Resource for Another Resource to Complete, but the Creator Wishes to see the Results of the Task.

Creator → Person → Creator
Options Using Workflow requests

Workflow Steps (Statuses)

- Maximum of Four Steps in a Single Request can be Used
- Resources or Roles May be Used in Each Step
- Workflow May have Only One Step
Options Using Workflow Requests

Workflow Process Flow

- Maximum of Ten Workflow Requests in a Linear Flow
- When the First or Previous Request Moves to a Pre-Defined Status, a New Request may be Created
- No Additional Business Logic is Used (Value of One Field Changes Direction of Workflow)

Workflow
Consists of 1 to 4 Steps

Second Workflow
Consists of 1 to 4 Steps

Third Workflow
Consists of 1 to 4 Steps

Fourth Workflow
Consists of 1 to 4 Steps
Options Using Workflow Requests

Workflows with Multiple Approvers (Realizers or Processors) for Moving Statuses

- Out-of-Box Synergy – One Person in Role Assumes Request, Completes Action and Moves Forward to Next Status
- GLM Tool – All Persons in Role Must Complete Action Before Advancing to Next Status
Options Using Workflow Requests

- **First Workflow**
  - Consists of 1 to 4 Steps

- **Second Workflow**
  - Consists of 1 to 4 Steps

- **Third Workflow**
  - Consists of 1 to 4 Steps

- **Workflow**
  - Consists of 1 to 4 Steps

- **Workflow**
  - Consist of 1 to 4 Steps

**Workflows with Event Manager or Rules Engine**

- Unlimited Number of Requests can be Created & Data From One Request to Another May Be Copied
- When Request Moves to Predefined Status, a New Request(s) can be Created
- When a Rule is Enacted (Event Manager / Rules Engine), a New Request(s) can be Created
Options Using Workflow Requests

Workflows with Multiple Paths Merged Together

- When a Rule is Used such as Field Value(s) Being Reviewed, New Request(s) can be Created (Requires Event Manager / Rules Engine)
- Information from Original Request can be Copied to New Requests
- Multiple Workflows can be Merged into a New Request
Workflow Enhancements

✓ A Workflow may be created using Multiple Approvers, Realizers or Processors can be defined in request settings. This allows “All” resources in a role to complete the step before it is advanced to the next status. (This requires a Tool from SynergyExpert.com)

✓ Workflow may have validation rules created using data from Synergy or other SQL databases. These Rules may be Reviewed With a Status Change or After the Request has Been Acted Upon. (This requires a Tool from SynergyExpert.com)
Workflow Enhancements

✓ Workflow may have additional free fields that can be used for more information. *(This requires a Tool from SynergyExpert.com)*

✓ Workflow Fields may have Security Applied, According to Role, Security Level or Dependency on Other Information in Request. *(This requires a Tool from SynergyExpert.com)*

✓ Workflow may include Data from other SQL databases to Allow Only Validated Information. *(This requires a Tool from SynergyExpert.com)*
Workflow Enhancements

✓ A Workflow may have SSRS Reports Embedded, Allowing Resources to Review Data Needed for Moving Request to Next Status.  *(This requires a Tool from SynergyExpert.com)*

✓ Workflow Fields may have Cascading Fields, Where the value in the First Field Directs Options in the Next Field.  *(This requires a Tool from SynergyExpert.com)*

✓ Workflows May Have an Actual Signature(s) Captured.  *(This requires a Tool from SynergyExpert.com)*
Workflow Enhancements

✓ Workflows Can Provide Unlimited Data Input Through the Use of Grids. *(Displaying this Information often requires a Tool from SynergyExpert.com)*
More Information

Please contact us to schedule a demo or receive additional information on our tools

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