

# Workflow Overview And Approach

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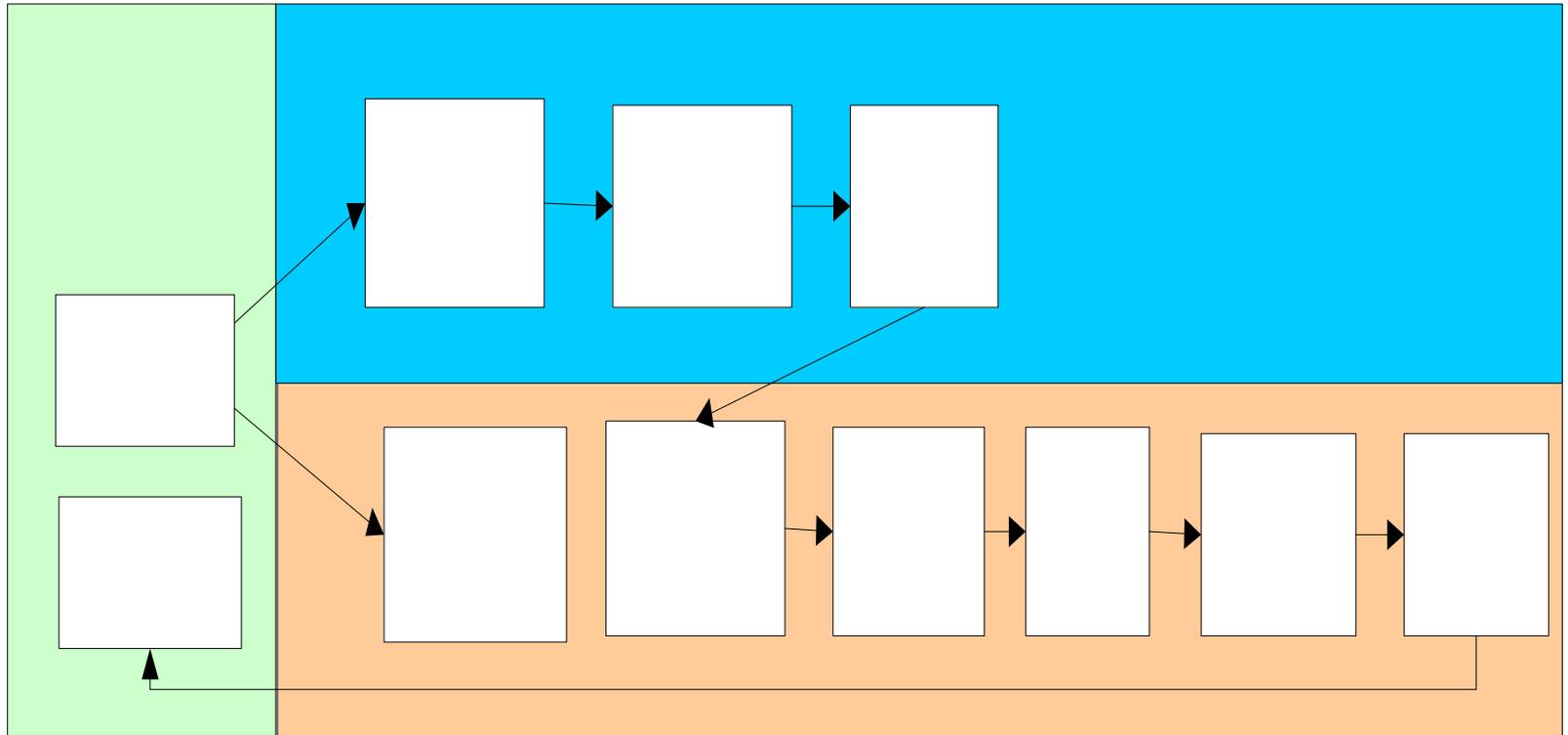
# Agenda

- What Is Workflow?
- Why Implement Workflow System?
- Workflow Architecture
- Technical Requirements for Workflow System
- Approach to Workflow Work

# What Is Workflow?

- Workflow is computerized facilitation or automation of a business process, in whole or part.
- A workflow management system defines, manages, and executes workflows.

# Sample eRA Business Process



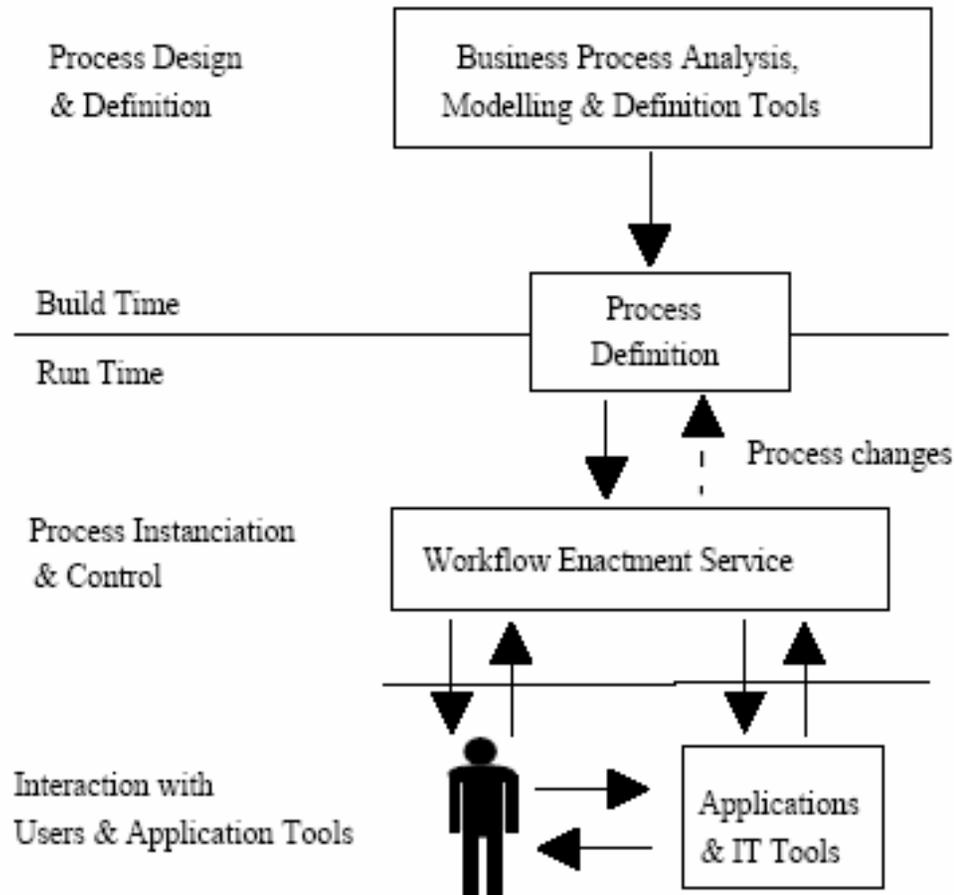
# What does workflow do?

- Dispatch work and send notifications based on the pre-defined process.
- Manage the business process based on the organizational model – support for approval authority, delegation, and substitution.
- Manage deadlines and priorities.
- Support the reporting on workflow status.

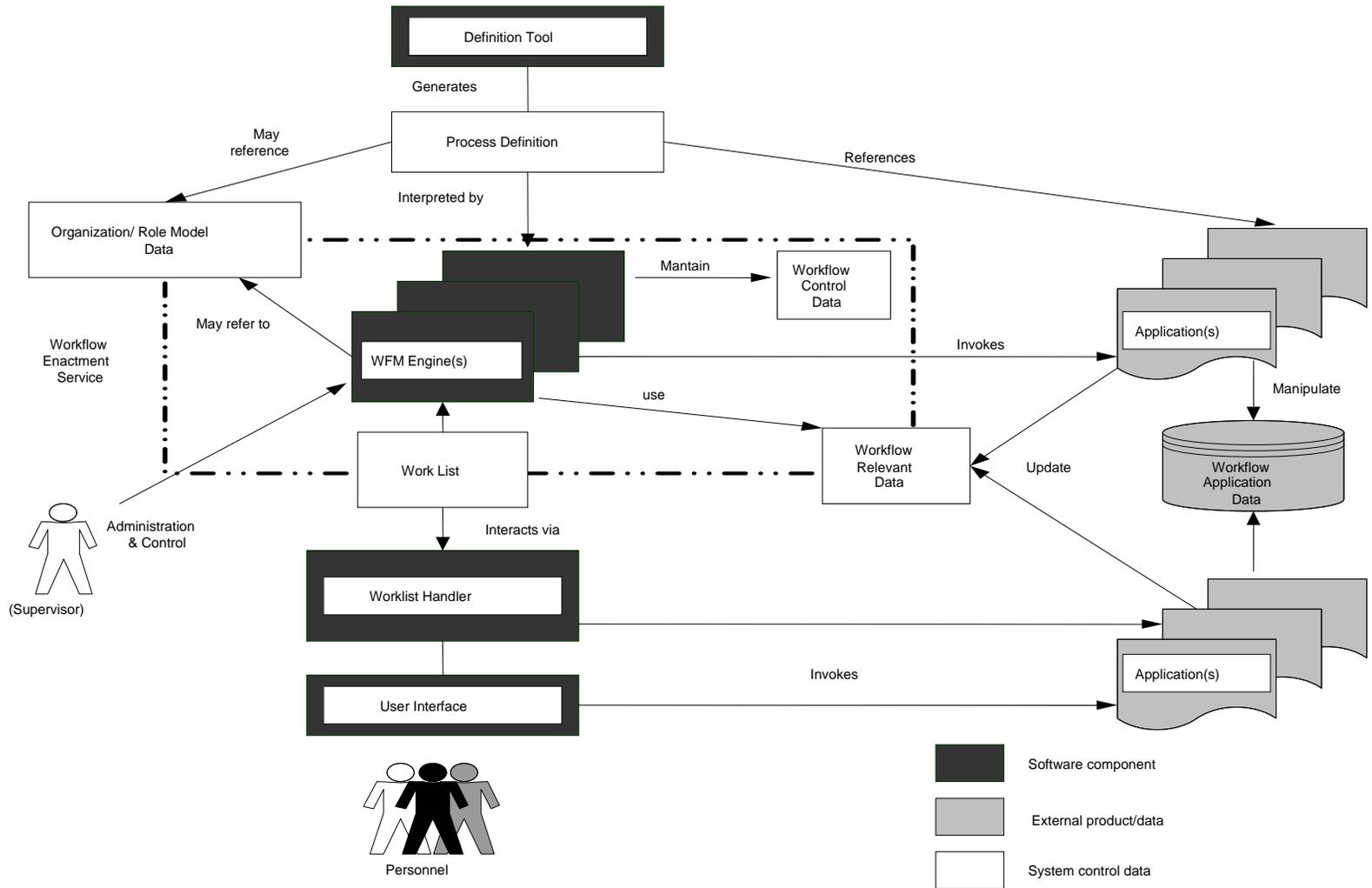
# Why Implement Workflow?

- Business process varies within a large organization.
- Business process changes over time.
- Treat each functional component as a building block and workflow as a connector/broker.
- Create a flexible and agile system by extracting process logic from applications.

# Workflow Architecture – Functional View



# Workflow Architecture – Component View



# Technical Requirements for Workflow System

- Workflow process definition
- Dispatching/Work activity management
- Event mechanism
- Support for organizational model
- Notification
- Reporting on the workflow status
- Performance and scalability

# Approach to the Workflow Work

- Joint efforts between business and requirements analysts, architects, and developers.
- Step-by-step approach as workflow will have widespread impact to the eRA system

Activities include:

- \* Business process modeling
- \* Identification of prototyping scenarios
- \* Workflow product evaluation
- \* Functional prototyping
- \* Determination of migration strategies
- \* Pilot implementation with selected process and user group
- \* Expanded production implementation

# Approach to Workflow Work

## **Business Process Modeling and Reengineering – Now to ?**

- The implementation of the workflow framework often goes hand-in-hand with the business process reengineering to gain the maximum benefit to an organization.
- Business process modeling is under way with Grants Management.

# Approach to Workflow Work

## **Identification of prototyping scenarios – April to June 2004**

- Identify one to two scenarios for the prototyping.
- The scenarios should be able to reflect major business requirements for a workflow product.
- The scenarios should help define the migration strategies for the workflow implementation.

# Approach to Workflow Work

## **Workflow product evaluation – April to June 2004**

- The product comparison study from the trade group used as the starting point.
- The information and recommendation from NIH enterprise architecture group to be incorporated.
- Oracle product included as the technology on the stack.
- Products used by other NIH organizations such as Bizflow from Handysoft to be considered.

# Approach to Workflow Work

**Functional Prototyping** – August to  
December 2004

- A couple of scenarios for prototyping
- One or two products to be evaluated.

# Approach to Workflow Work

## **Determination of migration strategies – July to December 2004**

- Find the ways to incorporate the existing eRA applications into the selected workflow framework.
- Define the path for pilot and expanded production implementation

# Approach to Workflow Work

## **Pilot implementation with selected user group – 2005**

- A business process within the grants management process to be used for the pilot implementation.
- A selected group of user to be asked to try the implemented workflow applications.

# Approach to Workflow Work

## **Expanded production implementation – 2005 to 2006**

- The expanded production implementation will integrate additional business processes into the workflow framework.
- The expanded implementation will also be planned in coordination with the business process reengineering.

# Questions

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