



Workflow Management

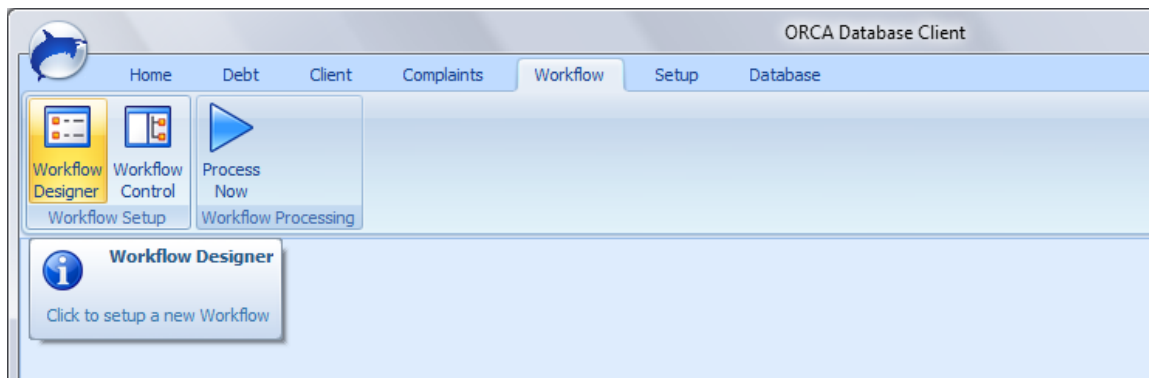
Workflows

Overview

A workflow is a series of instructions that are used to automate the work done on an account throughout its life cycle.

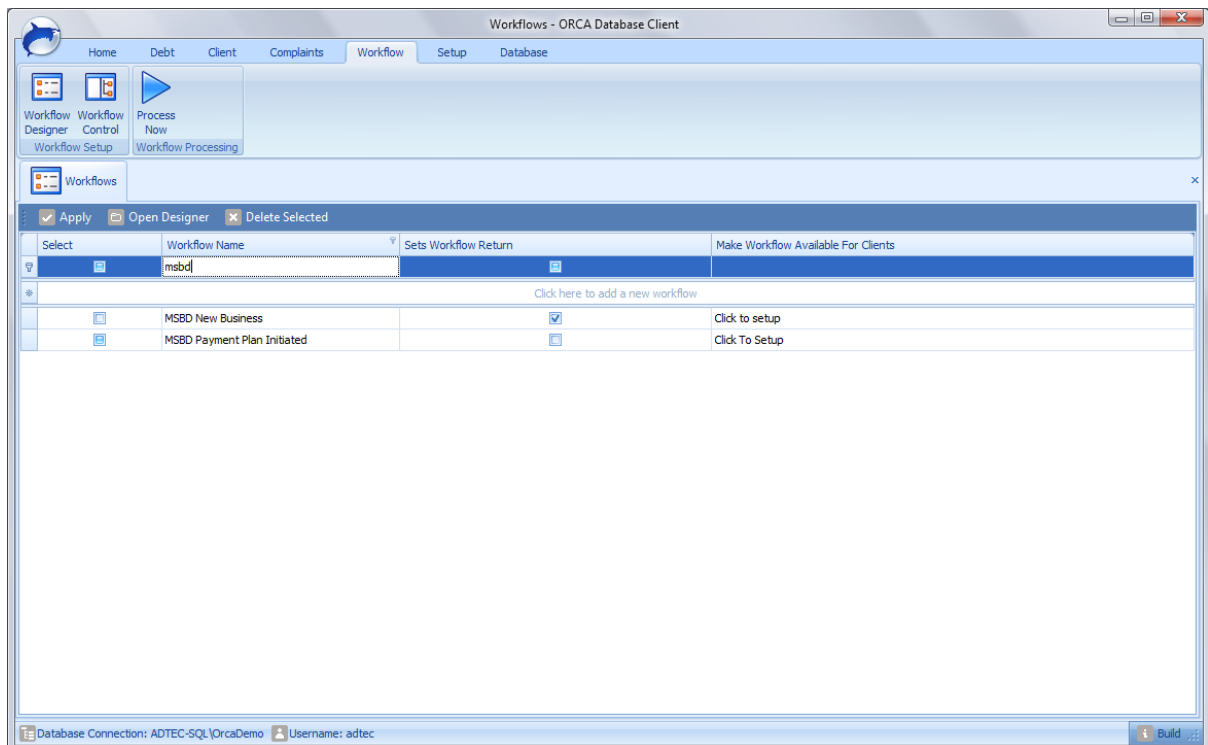
A workflow will consist of days, events and conditions. A workflow day determines when the instructions will be run; i.e., the number of days since an account was set onto the workflow. A workflow event is an automated instruction, such as the production of a letter. Workflow conditions are formulae that determine whether or not a particular event should or should not be processed.

The functionality and options for workflows are available from the workflow tab.



Creating a Workflow

Workflows can be defined initially by clicking the Workflow Designer button. This presents you with the ability to create and edit workflows.



Workflows can set a return point, which, when an account leaves this workflow, allows the subsequent workflows to return to where it left this workflow.

The workflow must be made available to the client accounts that it will be used with. This ensures all items such as letters and status codes used in the workflow are available to the accounts that may be set to it.

Designing a Workflow

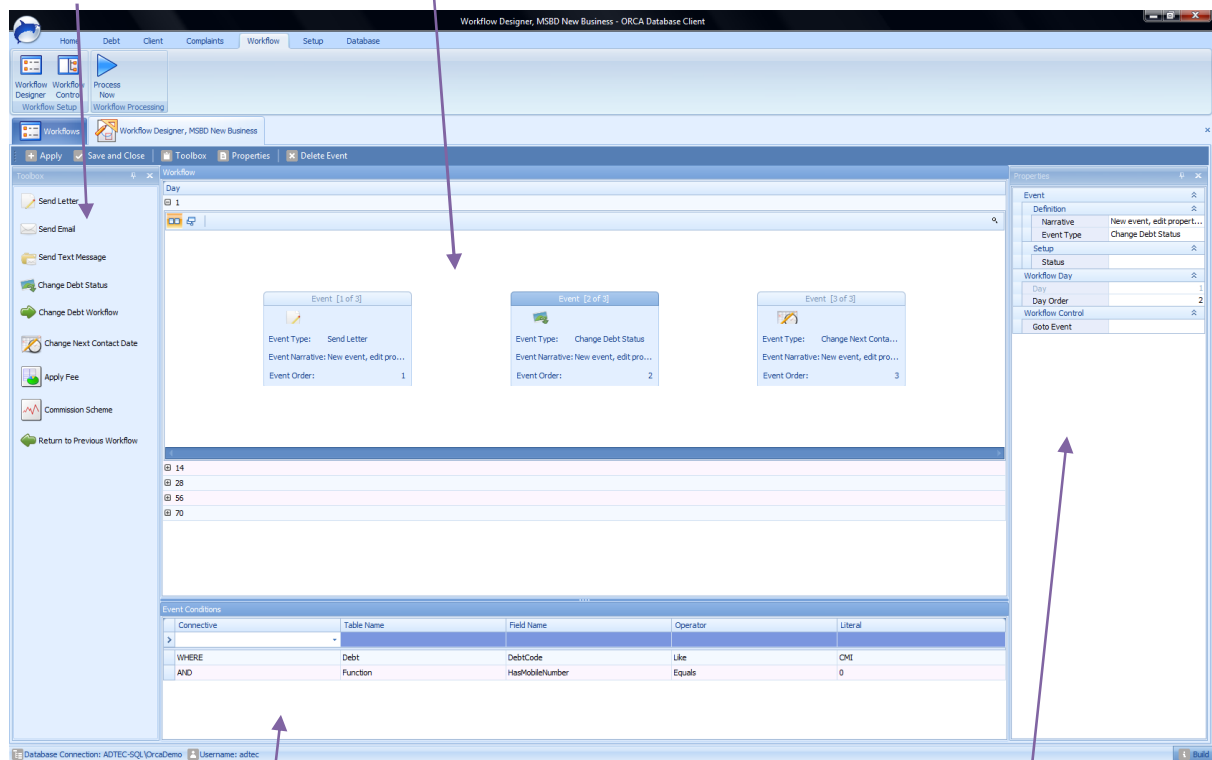
Double clicking a workflow launches the workflow designer. This is a drag and drop design environment from which every aspect of the workflow can be designed and configured.

The designer consists of four main elements, the tool box, the canvas, the condition editor and the property editor.

The tool box is a container for all possible workflow events that may be added to the workflow, from here; an event can be dragged and dropped onto the canvas, either into an existing workflow day, or creating a new workflow day. Once a workflow event is clicked, the properties and condition editors become available, allowing you to configure every aspect of that particular event.

Toolbox

Canvas



Condition Editor

Property Editor

Setting Accounts on Workflows

Accounts can be set on workflows in a number of different ways. The workflow can be set through ETL Studio when the account is imported, it can be set on the individual account record, it can be set when certain events happen, such as the commencement or breaking of a payment plan or it can be set by a workflow control.

Workflow Controls

Workflow controls can be run by the user or scheduled to run overnight, they take a series of parameters and any accounts matching those parameters will be set into a specified workflow when the control is run.

