FINASTRA

Phoenix Workflow Configuration Sheet

Use this document to plan your workflow by completing the sections below. This will ensure that you have everything needed before developing the workflow in Designer.

Workflow Definition Information: This section will cover all of the components that are needed for setting up the workflow definition and is defined BEFORE entering into the Designer application.	
What will this workflow accomplish?	Workflow Name and Description:
Which departments will be involved in the workflow process?	Department Name: 1. 2. 3.
What Queues do you want to assign to the Workflow? Remember that Groups and Roles roll-up to Queues so whichever Queues you select, users that are in the Groups/Roles associated with the Queues will be able to see the workflow in their Task Center.	Default Queue: Escalation Queue:
Do you want to assign any Service Level Objectives to the Workflow such as: Estimated Completion Time, Maximum Duration, or Priority values?	List the Desired SLO's here:
Do you want to change the purge policy for this workflow?	List Purge Policy Override information here:
Are there any alerts that you want to associate with the workflow?	List Alerts here:
Are there any triggers (business events) that you would like to associate with the workflow?	List Triggers here:
If this workflow includes any correspondence tasks, you will need to create the templates before building the workflow in Designer.	Word Doc/Letter Correspondence: Yes No Template Names:

	Email Correspondence: Yes No Template Names:
Which Phoenix Windows do you want to list in the Windows section of the definition? These are the windows where the definition can be launched.	List Windows screens here:

Use this section to develop the workflow flowchart process that will be created using Designer.   The column on the left is to list out the desired steps to complete the workflow; while the right column is for listing out the types of tasks needed to complete each step.

There is also a section to list any variables that will be needed to capture data within the Workflow. Remember that it is best to create the variables before beginning developing the tasks. A reminder that variables need to be entered as CamelCase (upper/lower without any spaces)   If you prefer, you may include the variables needed in the steps rather than listing them in a separate section.

Don't forget that when you enter designer you will need to enter a workflow version along with any notes before saving the definition.

Workflow Process Steps	What Tasks will be used to complete the step?

What Variables will you need for the workflow?	List the variables here: