Workflow

Ability to create and manage a configurable workflow which drives the flow of data through the system

Ability to view and analyze data in each step of the workflow

Workflow observability - like time taken in each step, entry/exit times, current status, reason of failure (if any), which then can be used to analyze how the system is working overall and if any performance improvements are required or not

User Personas - Workflow

User Profile 1

Chris Martin
Product Head

❝

Aim to establish the product as a leader of loan and debt servicing software platforms

Age: 46
Status: Married
Location: Paris
Education: MBA

`Organized` `Innovative`
`Practical` `Hard Working`
`Curious` `Leader`

Bio

Chris is a solution executive with over two decades of experience leading global software solution and managed services teams. He has the ability to traverse all area of the business including client relationship management, product management, operations, development and quality assurance. He's specialized in Fintech, Artificial Intelligence and Digitial Transformation.

Personality

Introvert ————————————— Extrovert
Analytical ————————————— Creative
Modern ————————————— Orthodox
Passive ————————————— Active
Technical ————————————— Non-Technical

Goals

- Consistent experience across all products in the suite
- Better insights into data and various stages of data processing including data visualization
- Smooth onboarding and offboarding of new clients without existing data disruptions
- Upmost security to be put in place to prevent accidental data breach (eg. unwanted display of one client's data to another)

Motivations

Automation ————————————
Comfort ————————————
Convenience ————————————
Speed ————————————
Innovation ————————————

Frustrations

- Design inconsistencies throughout products of the same suite, catering to confusion
- Limited insights and no control over the flow of data through various stages of processing
- Limited error handling and logging process which leads to delayed core issue identification
- Separate communication channels for separate tasks, which leads to more overhead and hence communication gap

User Profile 2

John Oliver
Product Manager

❝

Redesign the application in a way to have less manual intervention of internal team in day to day processes

Age: 42
Status: Married
Location: Maryland, US
Education: MBA

`Organized` `Creative`
`Practical` `Appreciative`
`Patient` `Open Minded`

Bio

John is a Product Manager with 7 years experience of handling the day to day operations of the product and dealing with the clients. The product is now 4 years old in working and he is primarily responsible for the manual configuration changes required on a release per release basis. He also acts as a mediator between the clients and the internal team for any new functionalities required or any major bugs reported.

Personality

Introvert ————————————— Extrovert
Analytical ————————————— Creative
Modern ————————————— Orthodox
Passive ————————————— Active
Technical ————————————— Non-Technical

Goals

- Less manual intervention in day to day processing
- Consistent design across all screens of the application (Version 1.0 has inconsistencies)
- Better insights into data and various stages of data processing including data visualization
- Put safeguards in place to prevent unintentional data modification
- Incorporate various day to day processes into single application (eg. task management)

Motivations

Manual Intervention ————————————
Comfort ————————————
Convenience ————————————
Speed ————————————
Action Clarity ————————————

Frustrations

- Design inconsistencies throughout the application, catering to confusion
- No safeguards for any unintentional data modifications, which may have serious implications
- Managing different processes is difficult as each has its own communication platform
- Limited insights and no control over the flow of data through various stages of processing

Sitemap - Workflow

Userflow - Workflow

USER

Adds a workflow → Opens a workflow builder

Edits a workflow → Is any of the instance of this flow or parent flow currently in progress?
- NO → Opens a workflow builder
- YES → Following updates will come in effect in next instance → Opens a workflow builder

Opens a workflow builder →
- Action steps → Details
- Action steps → Output ports
  - Output ports → Left
  - Output ports → Right
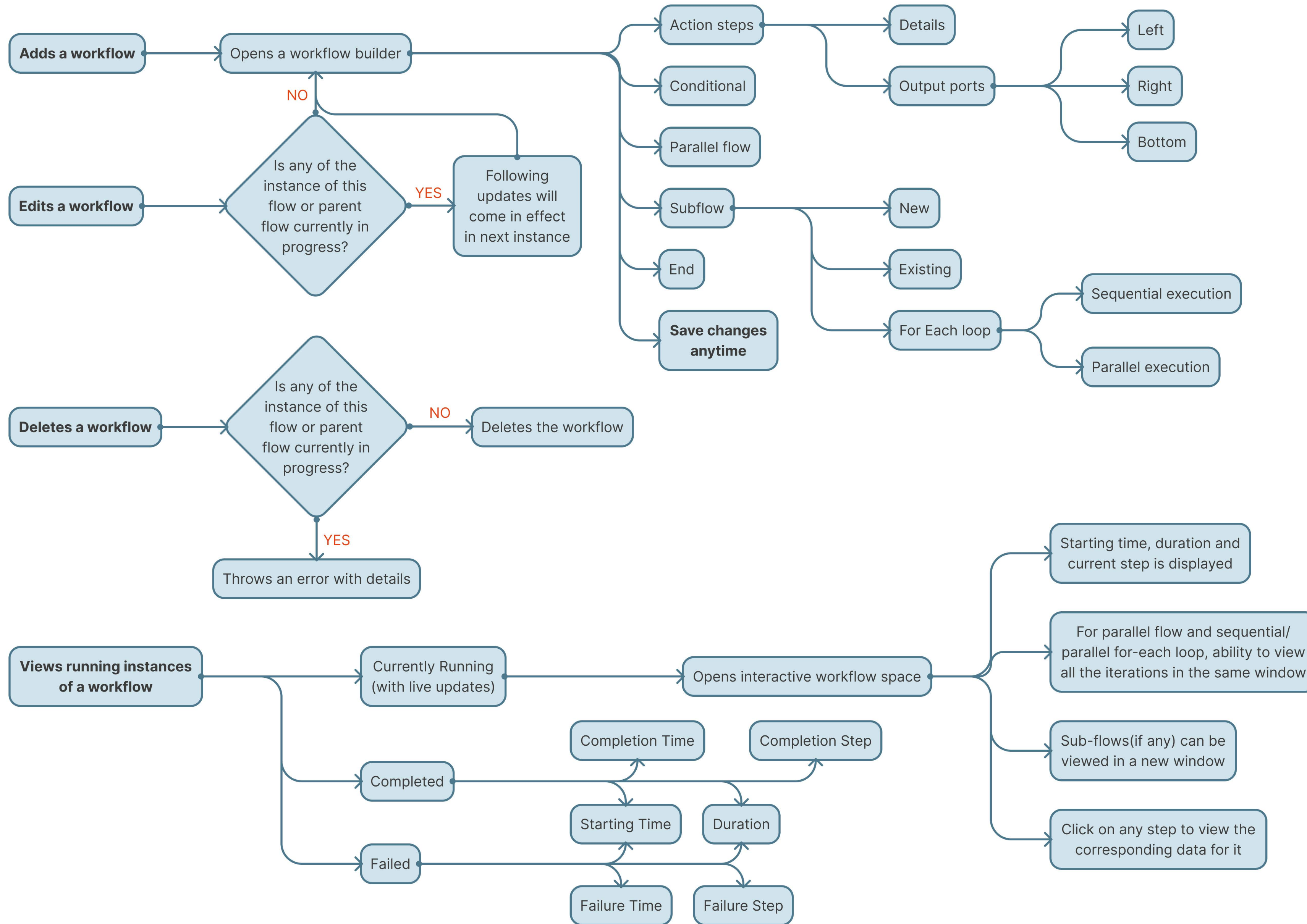 - Output ports → Bottom
- Conditional
- Parallel flow
- Subflow
  - New
  - Existing
  - For Each loop
    - Sequential execution
    - Parallel execution
- End
- **Save changes anytime**

Deletes a workflow → Is any of the instance of this flow or parent flow currently in progress?
- NO → Deletes the workflow
- YES → Throws an error with details

Views running instances of a workflow →
- Currently Running (with live updates) → Opens interactive workflow space
  - Starting time, duration and current step is displayed
  - For parallel flow and sequential/parallel for-each loop, ability to view all the iterations in the same window
  - Sub-flows(if any) can be viewed in a new window
  - Click on any step to view the corresponding data for it
- Completed
  - Completion Time
    - Starting Time
    - Duration
  - Completion Step
- Failed
  - Starting Time
    - Failure Time
  - Duration
    - Failure Step

Wireframes - Workflow

List of workflows

Application Name — John Oliver — ENV

SECTION 1
- Config 1
- Config 2
- Workflow

SECTION 2
- Config 1

SECTION 3
- Config 1
- Config 2
- Config 3
- Config 4

Section 1 / **Workflows**

EDIT DELETE ··· + ⊡

Search

WORKFLOWS

	Name	Column 2	Running Instances	Column 4
☑	Workflow 1	Col 2 - Val 1	1	Col 4 - Val 1
☐	Workflow 2	Col 2 - Val 2	0	Col 4 - Val 2

ACTION STEPS

Action Steps	Running Instances
Action 1	0
Action 2	1
Act 2 - Sub Act 1	0
Act 2 - Sub Act 2	0
Act 2 - Sub Act 3	1
Act 3 - Sub Act 1	1
Act 3 - Sub Act 1	1

Rows per page: 25 ▾   2 of 2

« Collapse

List of running instances of a workflow

Application Name — John Oliver — ENV

SECTION 1
- Config 1
- Config 2
- Workflow

SECTION 2
- Config 1

SECTION 3
- Config 1
- Config 2
- Config 3
- Config 4

Configurations / Workflows / **Instances**

Workflow 1 ▾   RUNNING COMPLETED FAILED

Search

	Unit ID	Parent Unit IDs	Flow Name	Starting Time	Duration	Current Step
	987	–	Workflow 1	10/13/2022 12:15 PM	07:01 mins.	Step 1
>	988	987	Subflow 1	10/13/2022 12:17 PM	05:11 mins.	Step 2
>	988	987	Subflow 1 - Row 1	10/13/2022 12:20 PM	02:380mins.	–
>	989	987	Subflow 2	10/13/2022 12:17 PM	05:11 mins.	Step 3
>	990	987	Subflow 3	10/13/2022 12:17 PM	05:11 mins.	Step 3

« Collapse

Workflow basic elements

Start

End - Success

ACTION
Action Description

Condition
Expression
Description

Condition
DETAILS OUTPUT PORTS
Condition Description *
Condition 1
{ conditional expression }
CANCEL SAVE

Action 1
DETAILS OUTPUT PORTS

PORT ACTION		PORT POSITION
Output 1	⠿	Bottom
Output 2	⠿	Left
None	⠿	Right

CANCEL SAVE

Workflow - Edit Mode

Workflow 1 — ✕

Workflow 1   SAVE CHANGES DISCARD   CLOSE EDITOR

Start
Condition 1
ACTION 1 — Action 1 Description
End - Description 1

FOR EACH LOOP (PARALLEL)
Start
Condition 2
ACTION 2 — Action 2 Description
End - Description 3
Condition 3
ACTION 3 — Action 3 Description
End - Description 2

PARALLEL FLOWS
PARALLEL FLOW 1
PARALLEL FLOW 2
End - Success

End - Success

ACTIONS
Action 1	Action 2
Action 3	Action 4
Action 5	Action 6
Action 7	Action 8
Action 9	Action 10

CONDITION
Condition

SUBFLOWS
| New Subflow | Existing Subflow |
| For Each Loop 1 | For Each Loop 2 |

PARALLEL FLOW
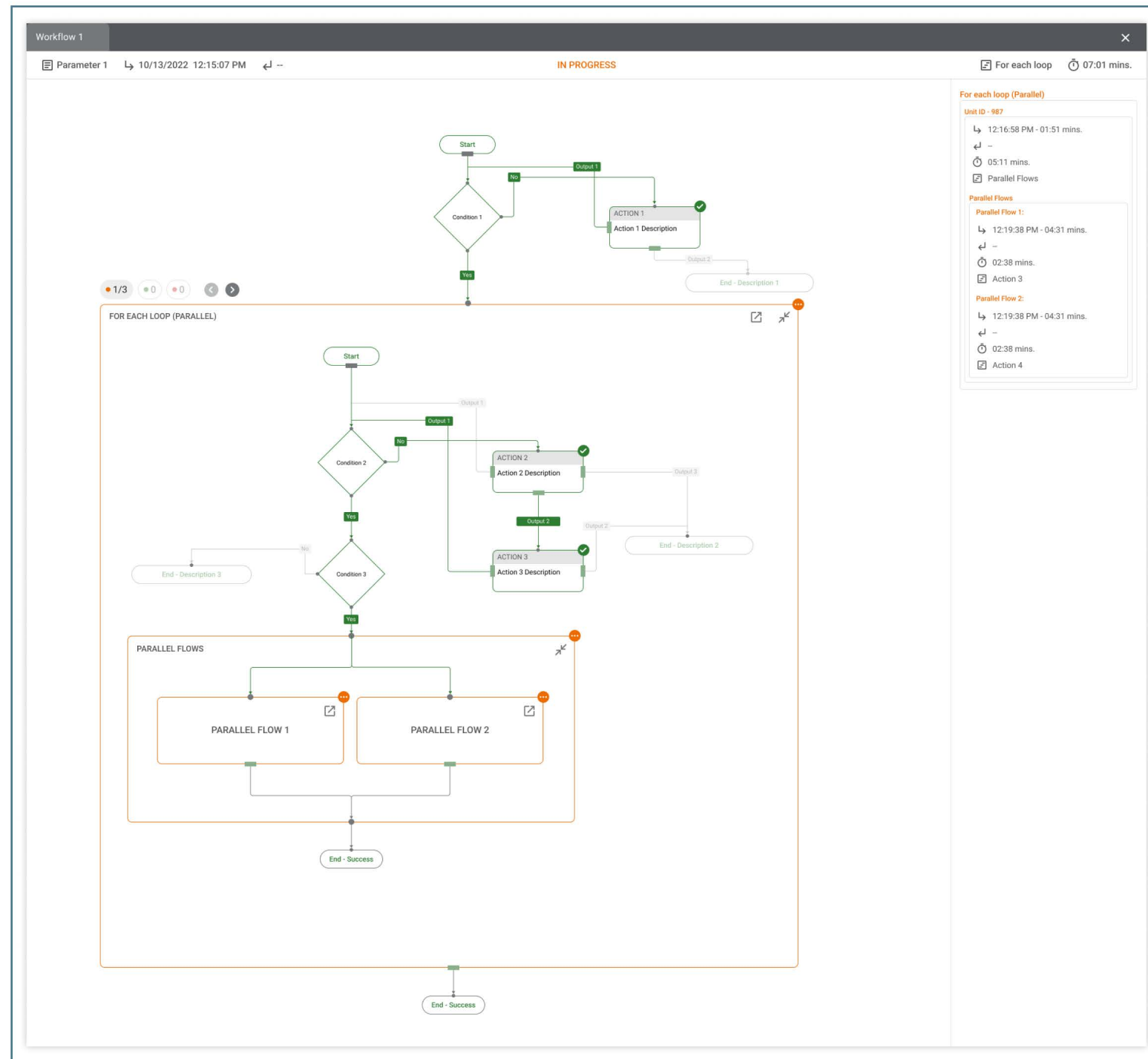Flow 1 Flow 2

END
End - Description

Workflow - View Mode

Workflow 1 — ✕

Parameter 1: Value 1 Trigger: Trigger 1 Steps: 6 Subflows: 1   EDIT WORKFLOW

Start
Condition 1
ACTION 1 — Action 1 Description
End - Description 1

FOR EACH LOOP (PARALLEL)
Start
Condition 2
ACTION 2 — Action 2 Description
End - Description 3
Condition 3
ACTION 3 — Action 3 Description
End - Description 2

PARALLEL FLOWS
PARALLEL FLOW 1
PARALLEL FLOW 2
End - Success

End - Success

Workflow - Subflow opened in a new window

Loan Notice   Parallel Flow 1 ✕ — ✕

Parameter 2: Value 2 Trigger: Trigger 2 Steps: 27 Subflows: 0

Start
Condition 1
End - Description 1
ACTION 1 — Action 1 Description
End - Description 2
ACTION 3 — Action 3 Description
ACTION 2 — Action 2 Description
Condition 3
ACTION 4 — Action 4 Description
End - Description 3
End - Description 4
ACTION 5 — Action 5 Description
ACTION 6 — Action 6 Description
ACTION 7 — Action 7 Description
Condition 4
Condition 5
ACTION 7 — Action 7 Description
ACTION 8 — Action 8 Description
Condition 6
ACTION 6 — Action 6 Description
Condition 7
End - Description 5
ACTION 2 — Action 2 Description
ACTION 3 — Action 3 Description
End - Success
End - Success

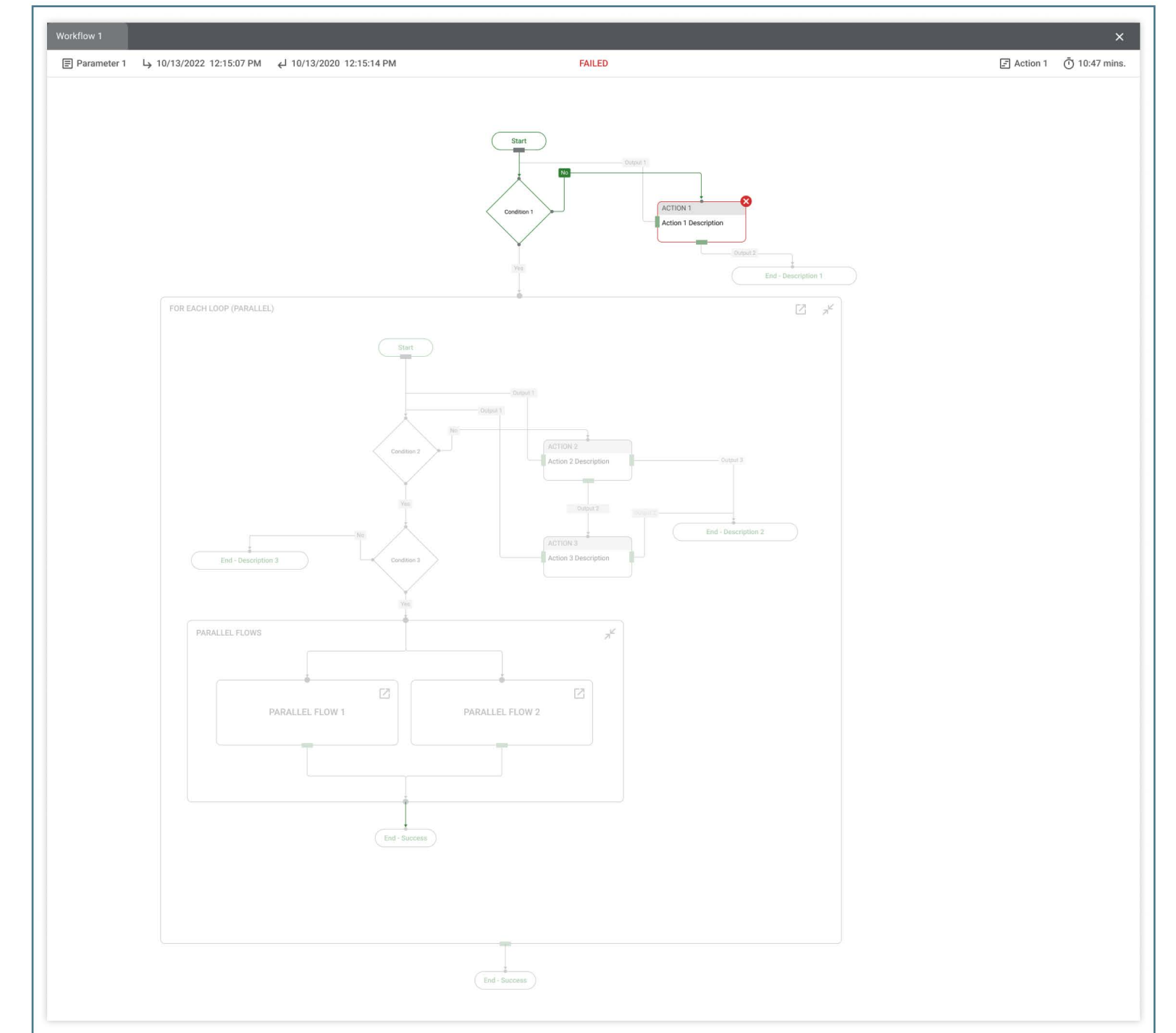# Wireframes - Workflow

Workflow - In Progress

Workflow - Completed
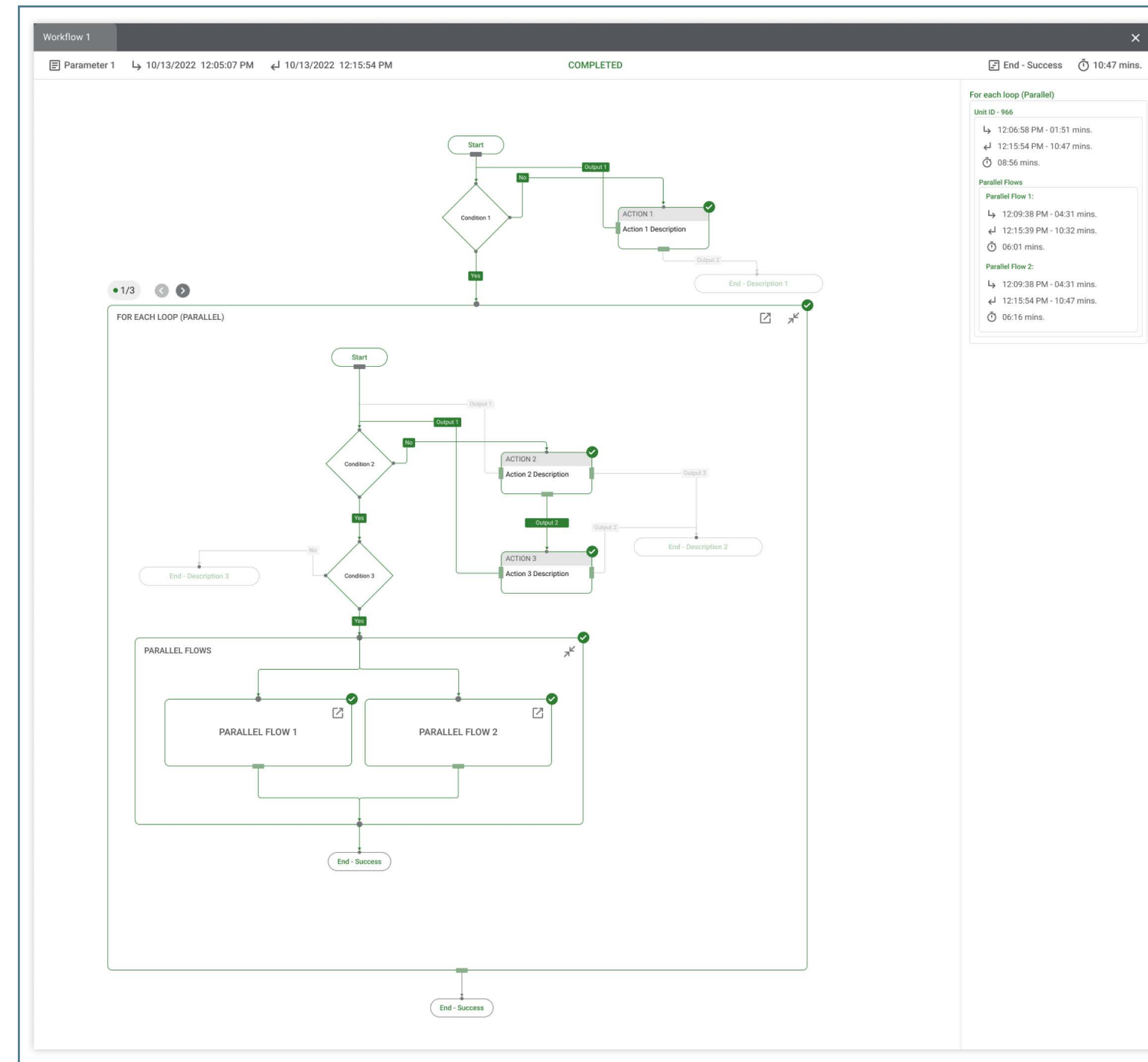
Workflow - Failed

That's all Folks!