
Workflow




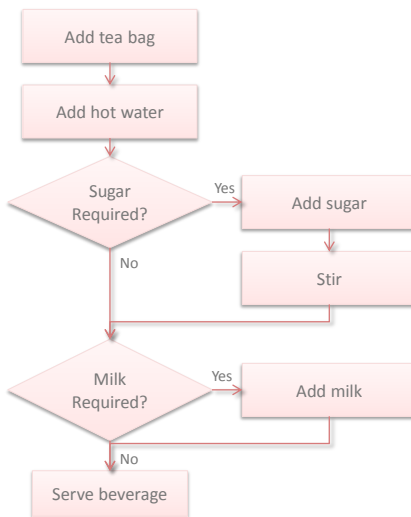
Road Map

- Workflows in Affinity
- Using Workflows
- Interpreting Workflows
- Creating Workflows
 - Basic Options
 - Activity Types
 - Due Dates
 - Training Menu
- Making Workflows Attach to Matters Automatically
- Teams

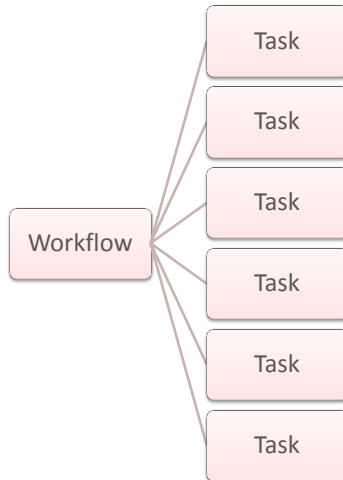
- Understanding what workflows are, and how they work in Affinity
- Work through workflows and procedures from the Tasks tab of a matter
 - Adding workflows to a matter
 - Opening, Starting, Finishing and Skipping tasks
- Locate tasks under the Diary and Task List
- Interpreting workflows that others have created

- Creating your own workflows
 - Understand the concepts involved in mapping out workflows
 - Providing useful labels and descriptions
 - Selecting suitable options for due dates
 - Attaching preconditions
 - Assigning tasks to appropriate team members
 - Attaching automated actions to tasks
 - Incorporating loops and decision points
- Creating sub-procedures
- Creating and editing functional workflow teams

- **Workflows in Affinity** 
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- A workflow is a step-by-step process for getting work done
- Creating a workflow involves mapping out processes, writing down what one does in different circumstances
- Workflows consist of multiple tasks



What?
When?
By whom?



Not involved here

- Workflow in Affinity is NOT an enforcement tool
- It will not force people to do the right thing




Show next steps

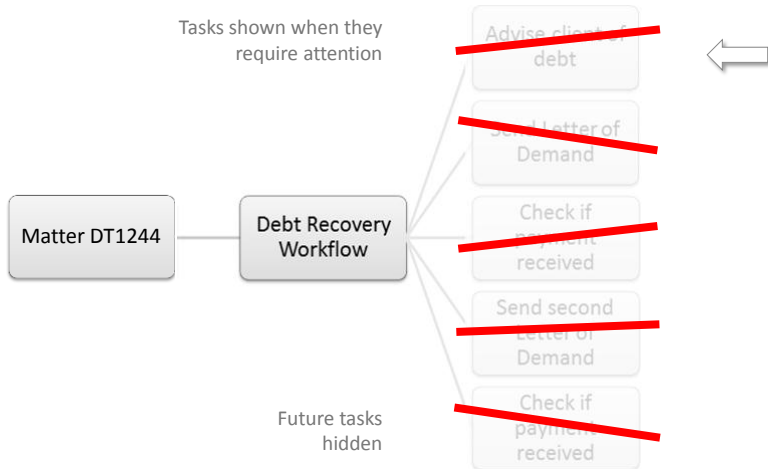
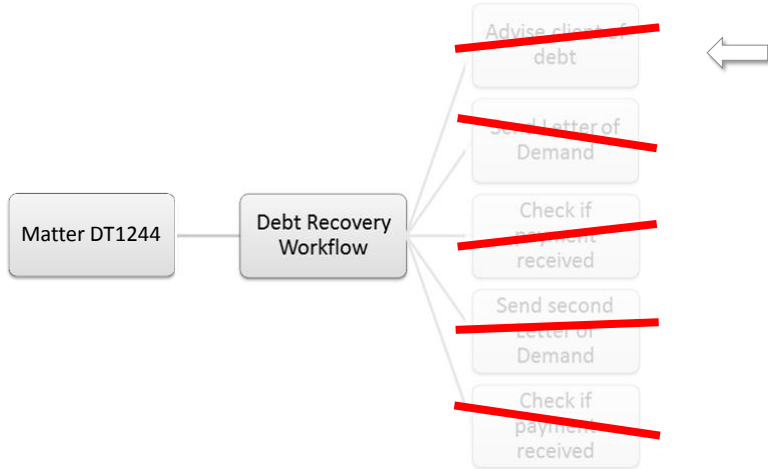


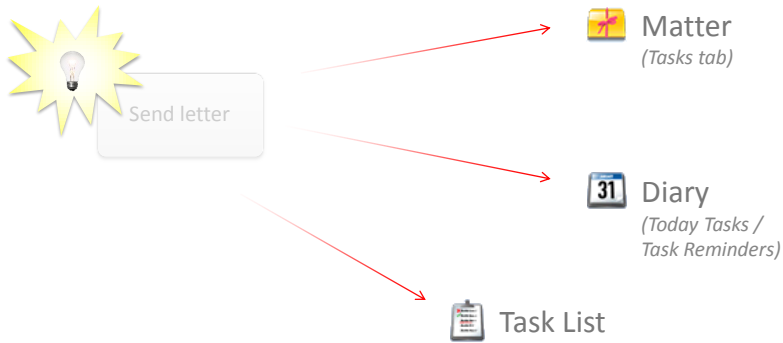
Automate tasks



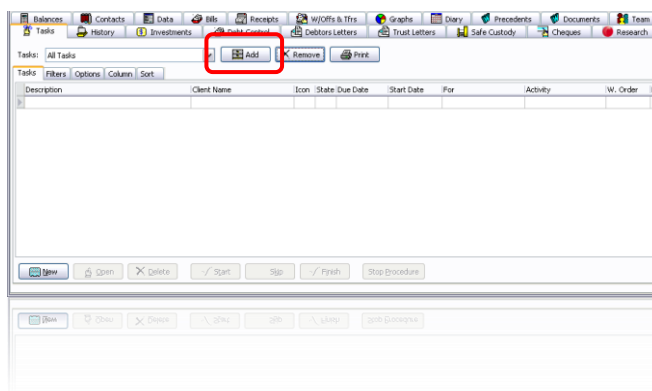
Set reminders

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 Matter
(Tasks tab)





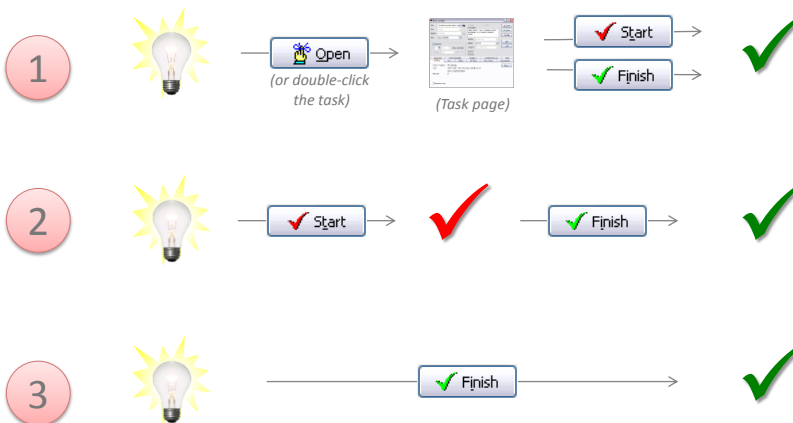
New



Started
("In progress")



Completed

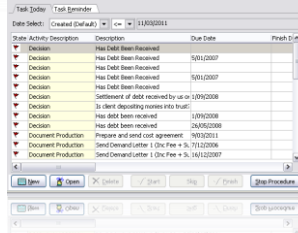
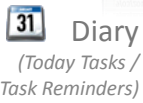
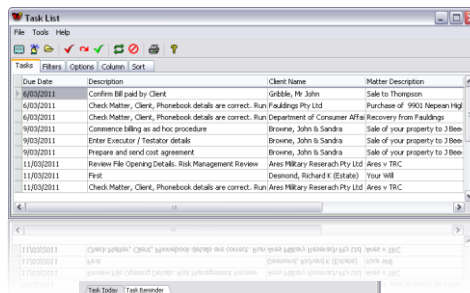





Overdue

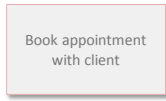


Skipped
("Ignored")



- To be provided as course progresses

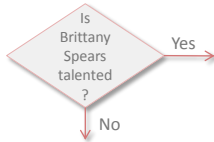
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Simple Task /
Schedule /
Phone



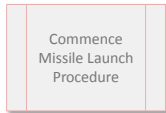
Data entry into
DataForm



Decision point



Document
Production /
Email

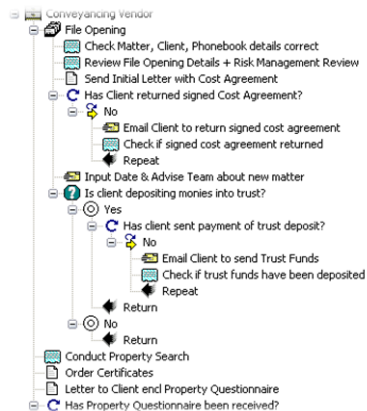


Sub - Procedure


The Workflow Area allows you to view and edit workflows

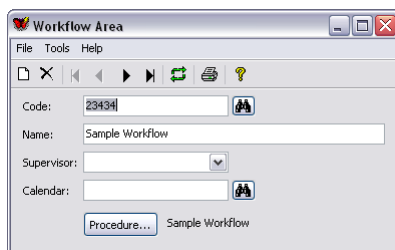
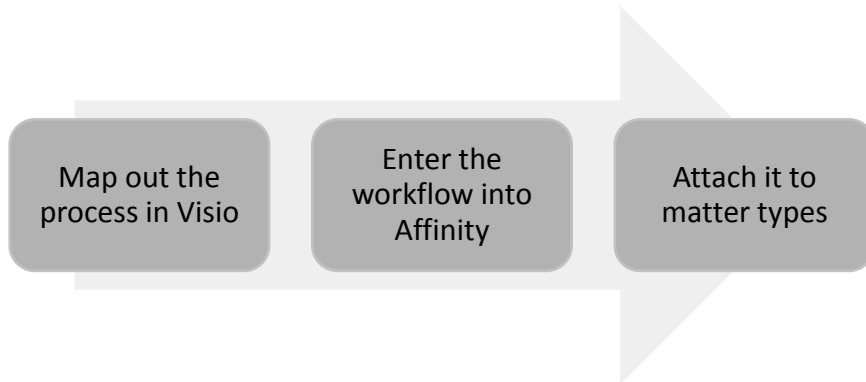
PROCESS

1. Case Management
2. Workflow Area
3. Look up the workflow
4. Click on 'Procedure...'





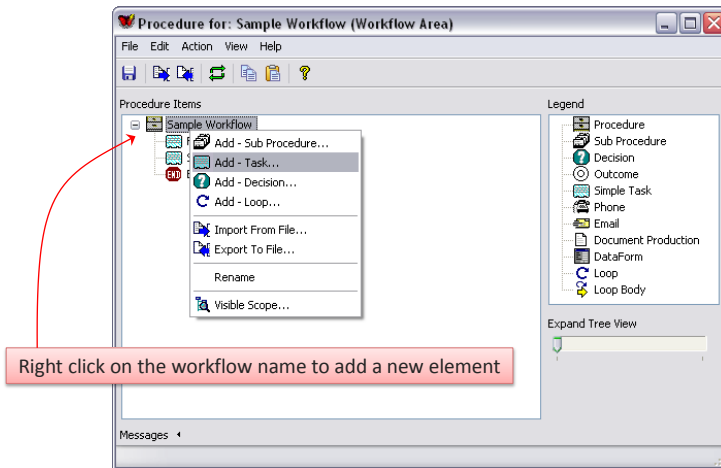
- To be provided as course progresses

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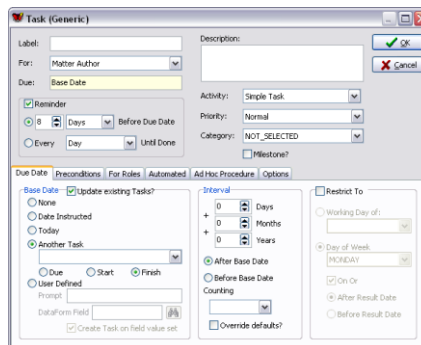
PROCESS

1. Case Management
2. Workflow Area
3. Click on New ()
4. Enter Code
 - Not visible to end user
5. Enter Name
 - Visible to the end user
6. Green tick ()
7. Procedure...



PROCESS

1. Fill out label and description
2. Allocate the task (using 'For')
3. Un-tick 'Reminder' unless it is a crucial task
4. Select a priority and category




Label

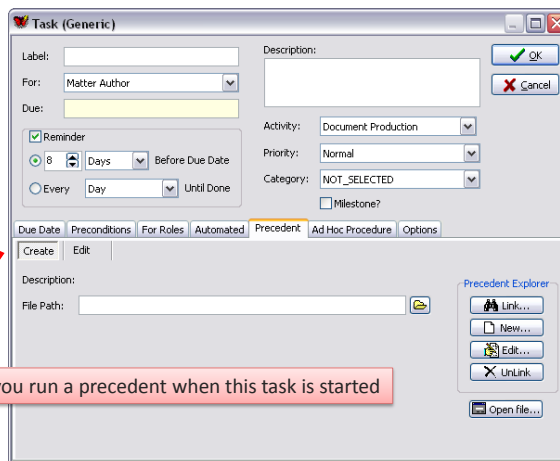
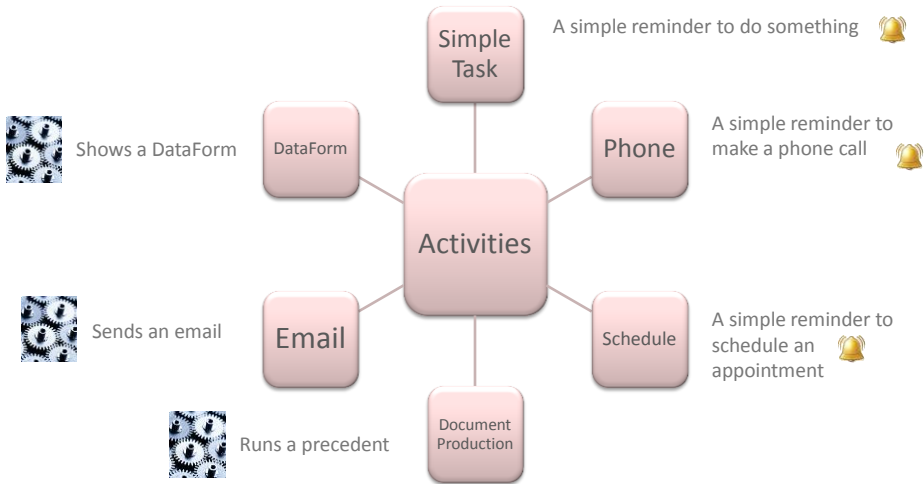
vs.

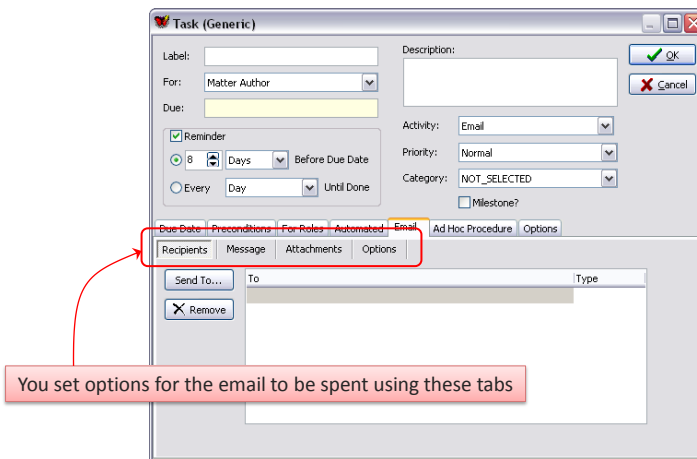
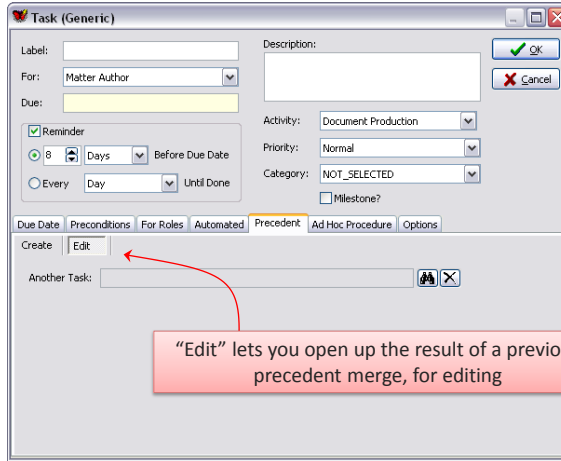
Description

- Only appears in Workflow Area
- Does not appear to end user

- Appears under the matter without the label
- Needs to be as specific as possible

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Due Date = Base Date +/- Interval

e.g. ,

Due Date for "Send Confirmation Email" = Settlement Date – 5 work days

"Base Date"
"Interval"

Option	Description
None	No due date set
Date Instructed	Date instruction was received
Today	Date task created (i.e. at beginning or when a decision or loop was entered)
Another Task	Sets the base date to date another task is created, started or finished
User Defined - Prompt	Asks the user for the due date (interval always 0)
User Defined - DataForm field	Gets the due date from a DataForm field

Due Date = Base Date +/- Interval



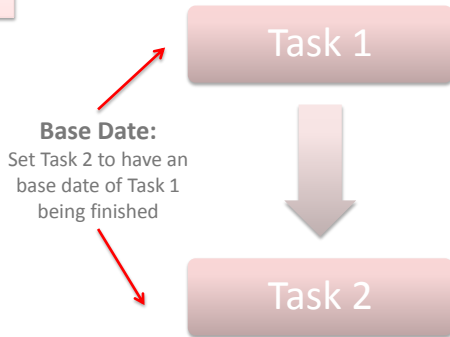
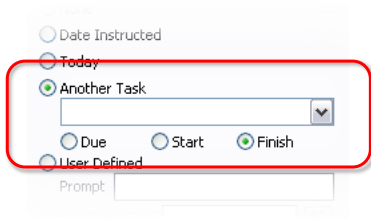
2
Which days count?



Due Date = Base Date +/- Interval

By default, Affinity adds *all tasks* in the workflow at the beginning

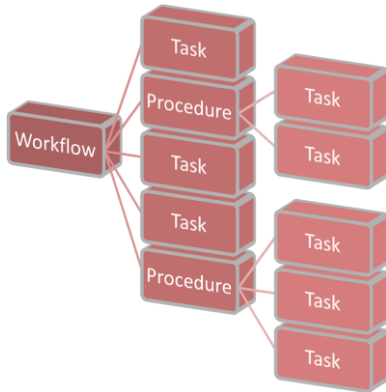
To make them appear *one-by-one* instead, use **"Another Task"**.



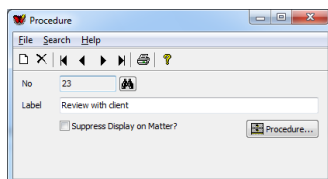
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
Copying and Pasting Tasks	Preconditions	Decision Points and Outcomes	Adding Loops
Including Fields in Email Subject and Body	Automated Tasks	Ad-Hoc Procedures	Adding Procedures
For Roles	Setting calendars	Linking DataForms and Diary Entries	Next Section



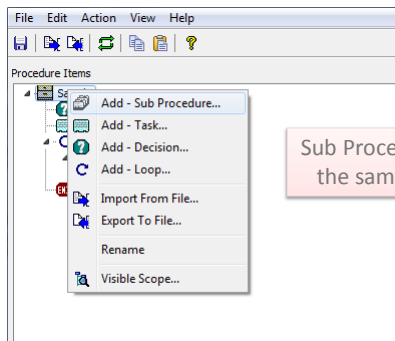
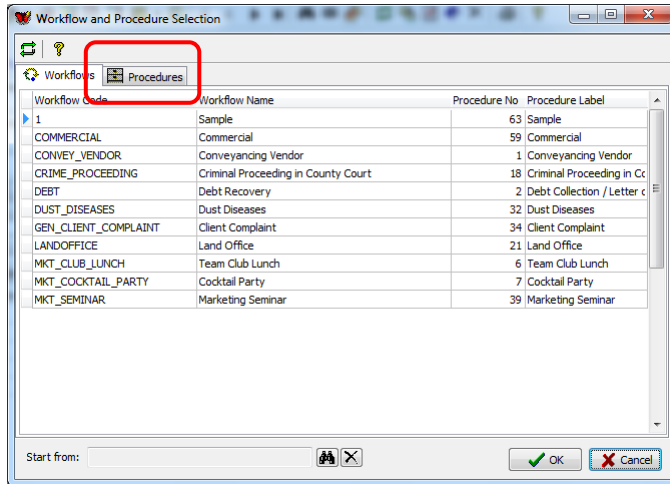
- Procedures are re-usable sections of workflow
 - E.g. “Open File”, “Bill Client”, etc.
- They can also help segment a complex workflow
 - E.g. procedure “Pre-settlement” within workflow “Conveyancing – Vendor”



PROCESS

1. Case Management
2. Procedures
3. Click on New ()
4. Enter Label
5. Green tick (✓)
6. Procedure...



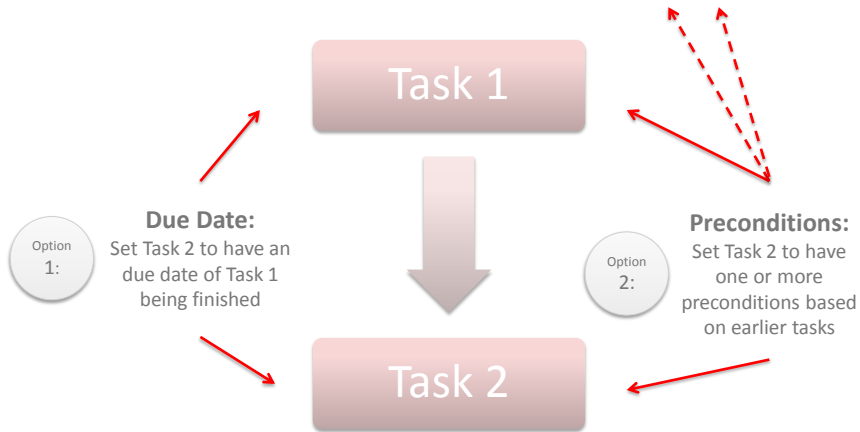


Sub Procedures are added in almost exactly the same way that you would add a task



- Preconditions allow you to define criteria that must be met before a task can be commenced
 - E.g., Send appointment confirmation letter must come after the appointment has been scheduled
- You can set multiple preconditions

- In most instances, tasks will appear at the beginning, **unless**:
 - They have their due date based on another task
 - They are inside a loop or decision point
 - **They have a precondition attached to them**
 - As long as “Create this task if this precondition is satisfied” is ticked

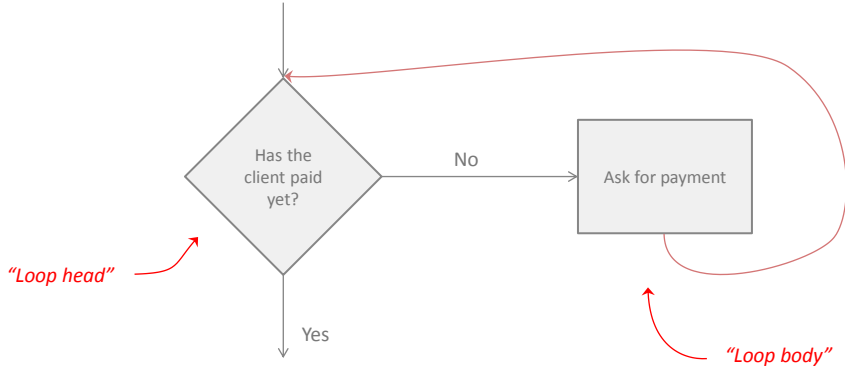


- Workflows can “branch”
- A Decision Point poses a question, redirects workflow
- Each branch starts with an “Outcome”
 - Tasks are added to each outcome

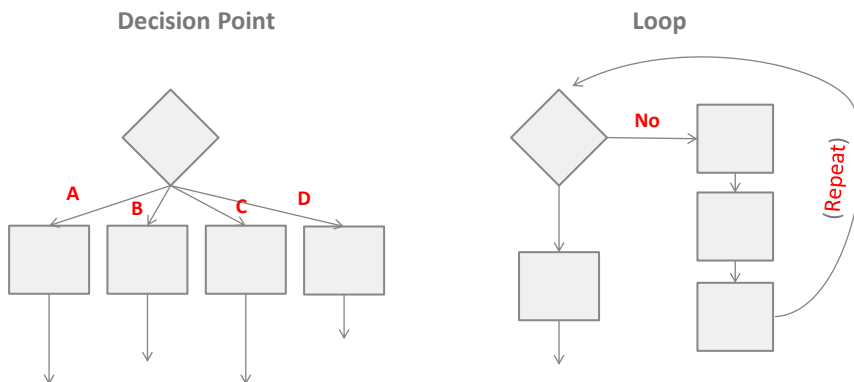


- Default answer is “Not Decided Yet”
 - Effectively means “do nothing”
 - Task remains new and “unstarted”
 - Can be re-labelled

- In most instances, tasks will appear at the beginning, *unless*:
 - They have their due date based on another task
 - **They are inside** a loop or **decision point**
 - They have a precondition attached to them
 - As long as “Create this task if this precondition is satisfied” is ticked



Default option label	What this option does	Where to change label
Not yet decided	Nothing; same as hitting cancel	Edit Workflow → Edit task → Options tab
No	Commence loop body / continue looping	Edit Workflow → Right-click task → Rename
End Loop	Exits the loop, marks the loop as finished	Edit Workflow → Edit task → Loop tab



- In most instances, tasks will appear at the beginning, *unless*:
 - They have their due date based on another task
 - **They are inside a loop** or decision point
 - They have a precondition attached to them
 - As long as “Create this task if this precondition is satisfied” is ticked

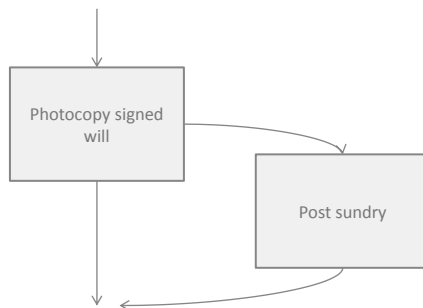
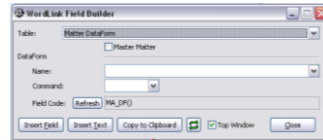
Decisions and Loops must be opened in order to complete them



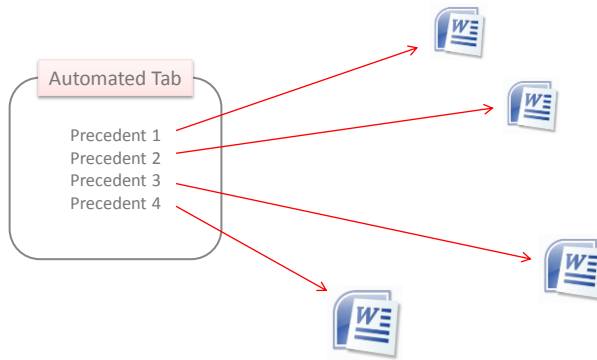
Fields can be copied from the WordLink Field Builder

%MA_FILEID% %MA_LONGDESCR%

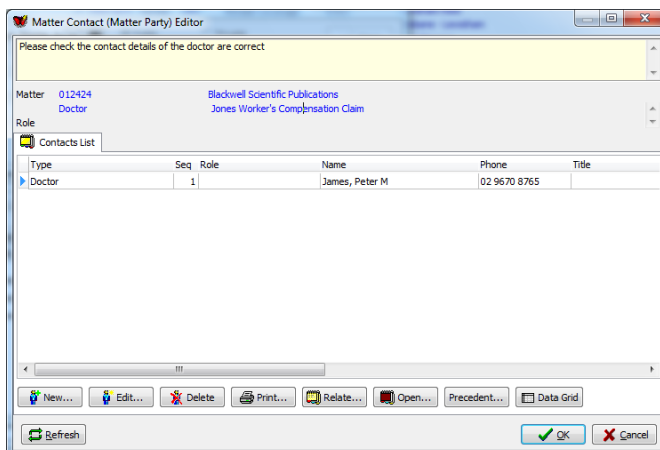
Sincerely yours,
%MA_AUTHOR_NAME%



This does not appear as a task. It is done automatically.



The automated tab allows you to fire off multiple precedents in one task





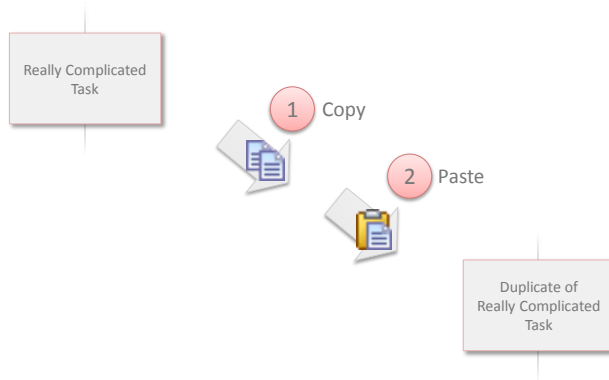
Ad Hoc Procedures

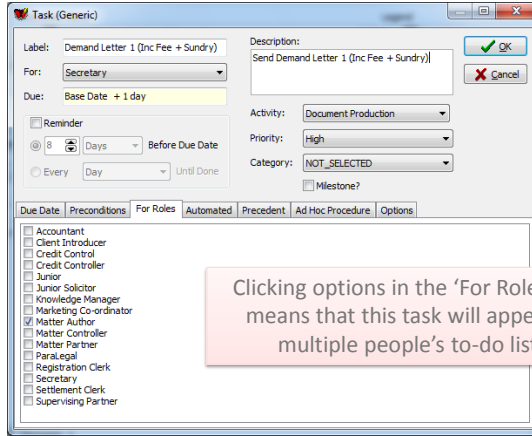
- Generates a separate workflow when run.
- Must be run by completing a task first.
- Procedure elements are not visible in the workflow area



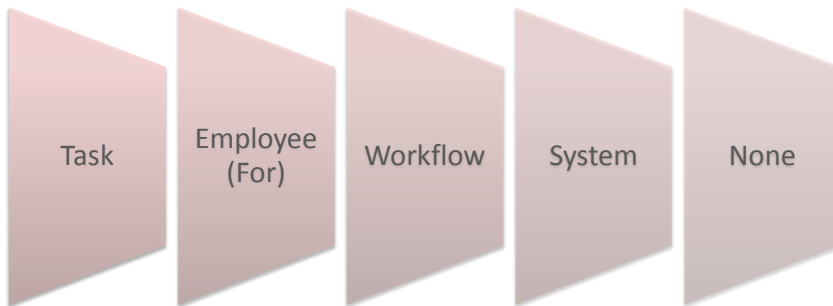
Sub Procedures

- Re-usable portions of workflow.
- Integrates into a workflow seamlessly

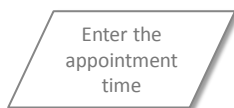




Calendars can be set in a variety of places:



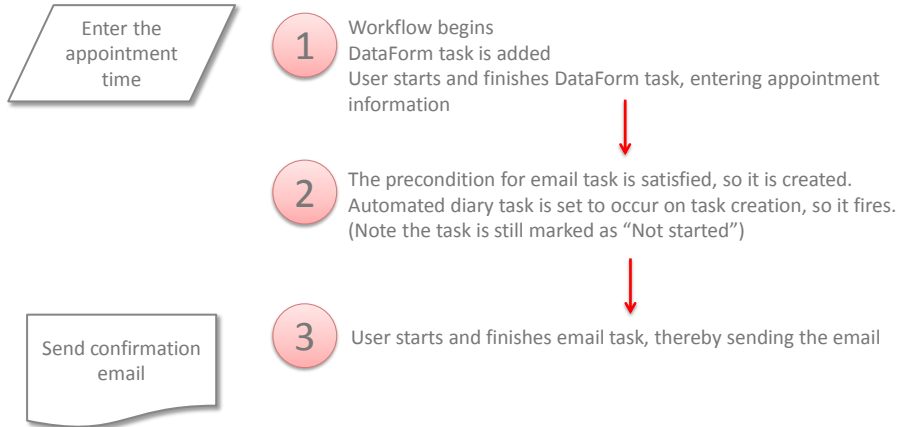
In order of priority...	Where Configured
Task	Workflow procedure → Edit task → Due date → Counting
Employee (For)	Database → Employees → Calendar
Workflow	Case Management → Workflow Area Calendar
System	System Settings → System → General → Calendar
<i>If none of the above are set, no calendar is used (i.e. 7 day weeks)</i>	




- Needs to be single instance and use shared fields
- The due date of this task is not important



- Due date set to the date in the DataForm
- Set a precondition to create this task after the DataForm is filled out
- Set an automated task to create a diary entry on task creation.
- Link the start date of this diary entry to the due date of this task.
- Set this task to create an email containing a field reference to the DataForm information



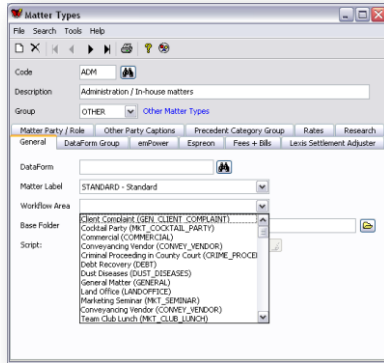
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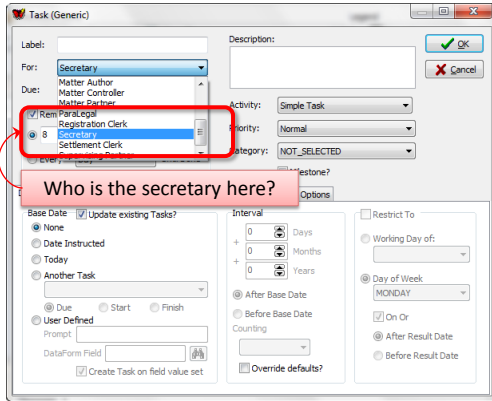
1. Database → Matter Types
2. 'General' Tab
3. Workflow Area



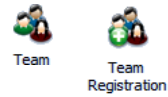
Matter
Types



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Teams connect roles to people



Secretary = John
 Paralegal = Jaime
 Accountant = Jo

“Conveyancing Team”

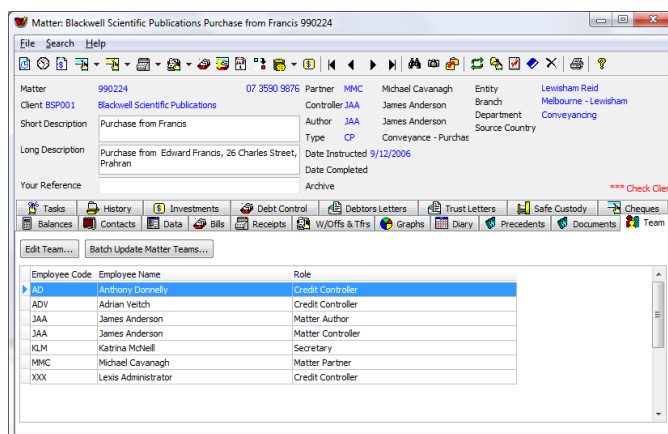
Secretary = Susan
 Paralegal = Tina
 Accountant = Jo

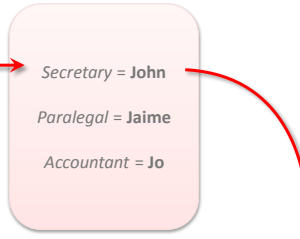
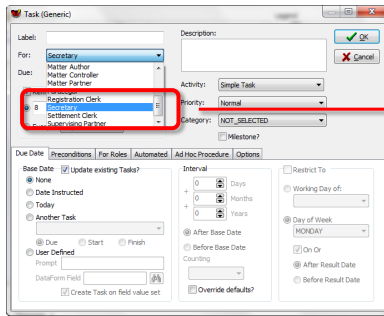
“Commercial Team”

- Create a Team via Team Registration



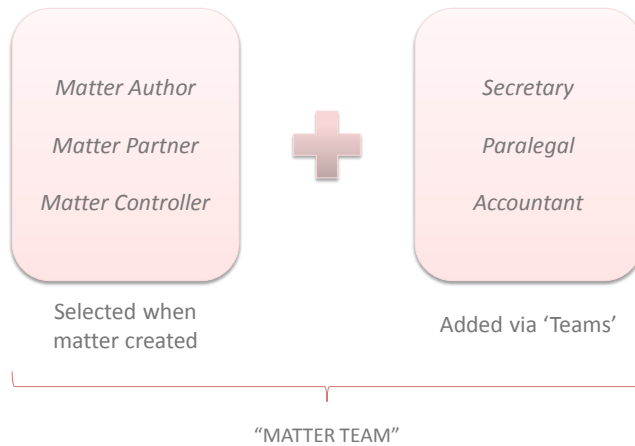
- Add staff members to that team via Teams





“Conveyancing Team”

This task will be allocated to **John** for this matter



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