Course Code: MAX4334G

Course Title: Maximo Application Suite - Manage: Workflow Development

Description:

In this course, we will look at how workflow processes can be developed to support custom business requirements. We'll see how various nodes can be used to design business logic and route records to individuals and groups of individuals for approval or action.

Objectives:

After completing this course, you should be able to:

- Understand workflow designer application and configurations
- Create roles
- Create actions
- Create condition, manual input, interaction, task, wait and subprocess nodes
- Understand benefits of escalations in workflow
- Understand different methods of routing workflow
- Understand procedure of escalating assignment of tasks
- Understand procedure of configuring escalation to initiate workflow

Duration:

16 Hrs

Topics:

Module 1: Introduction to Workflow Planning and Design

- Course Objectives
- Describe the importance of Workflow
- Describe the different stages of a Workflow
- Understand Workflow Actions
- Describe different Workflow components
- Understand Sample Workflow

Module 2: Introduction to Workflow Designer

- Workflow Designer Application
- Different tabs available
- Use of fields
- Use of Actions
- Workflow Processes

Module 3: Workflow Administration

- Workflow Administration application
- Use of Workflow Administration

Module 4: Roles in Workflow

- Role Usage
- Role Types
- Permissions and Workflows
- Person Groups
- AUTOACCEPT and AUTOREJECT Roles

Module 5: Actions in Workflow

- What are Actions?
- Different Types of Actions: Application Actions, Set Value, Change Status, Action Groups, Command Line Executable, Automation Script Action, Custom Class Action
- Using Actions in Applications

Module 6: Condition Nodes

- Concept of Condition Nodes
- Creating Condition Nodes
- Condition Node Configuration
- Different types of Conditions

Module 7: Task Nodes

- Task Node Overview
- Creating Assignments
- Conditional Assignments
- Assignee Relationships
- Calendar Based Assignments
- Escalating Assignments
- Advanced Task Usage

Module 8: Manual Input Nodes

- Using Manual Input Nodes
- Configuring Choices
- Example Configuration
- Conditional Options

Demonstration: Creating a Simple WorkflowStudent

Exercises: Lab 1: Simple Workflow

Module 9: Escalations in Workflow

- Benefits of Escalations in Workflow
- Different ways of launching workflows
- Escalate the Assignment of a task
- Initiate a Workflow using Escalations

Module 10: Interaction Nodes

- Message Display
- User redirection
- Triggering an Application Action
- Triggering another Workflow

Demonstration: Interaction Nodes

Module 11: Workflow Subprocesses

- Concept of Condition Nodes
- Creating Condition Nodes
- Condition Node Configuration
- Different types of Conditions

Module 12: Wait nodes

- Concept of Wait Nodes
- Properties of Wait Nodes
- Use of Wait Nodes

Demonstration: Subprocess Nodes

Student Exercises: Lab 2: SR Workflow

Audience:

Implementation Consultants, Administrators, Technical Sales, System Users