Workflow is the process of moving data to the proper users or processes for them to do their share of a larger process. Once they are done, the workflow system then moves the data to the next user/process for the next phase of work and so on. docMgt's unique Work Trigger system is designed to accomplish this in a simple and flexible manner.

WORKFLOW VS. WORK TRIGGERS

A typical workflow system uses Visio-like diagrams where each step of the workflow process is represented as a box in the diagram. The squares are connected with lines that tell the workflow system where to take the data after this step is done. In the middle of the steps there may be decisions that determine whether or not subsequent steps execute. So not only do you need to tell the system where to take the data by defining the decisions but you also need to draw it a line to tell it how to get there.

Work Triggers, on the other hand, are independent. There are no lines connecting them. Each step of a process is represented by a single Work Trigger. That Work Trigger watches for data moving through the system that matches the trigger's requirements. Once the data matches the trigger's requirements, the Work Trigger is activated and the users/processes are assigned the work. There are no lines to draw or decisions that need to go between steps. All the logic for that step resides in that Work Trigger. By evaluating the data independently, Work Triggers know when to activate and when to wait.

BENEFITS OF WORK TRIGGERS

In the typical workflow system you have to account for every possible variation of the defined path for the data. Any time you want to allow a user to move that information it MUST be down one of the pre-defined lines that were drawn. If you did not draw a line then the user cannot execute that aspect of their job. This is where a lot of the time is consumed when designing workflows – deciding what lines are needed and adding them as things these missing pieces are discovered.

In docMgt's Work Trigger environment, you only need to worry about one step at a time. You don't have to concern yourself so much about "where to send the data after this step." If you ask each user in the process what their job is in regards to a document type and what would make them have to act upon that document then you can design Work Triggers to match each user's work responsibility. The flow of the data should happen because of the data – not arbitrary lines that are drawn.

For example, in an invoice workflow you could have an "indexing" step. In docMgt you would configure a Work Trigger that said "if certain fields are empty then send it to this user or team to be indexed." Any time an invoice was routed that was not indexed it would go to the user(s) assigned to that trigger. No matter if the invoice just came in from a scanner or if it was almost done in the process when the information was somehow removed. As soon as a routed invoice has no index information it goes to indexing. In order to do that with a typical workflow system you would have to draw lines from EVERY STEP of the workflow to a decision step that checked for missing information and if no indexing was there take it to the indexing step!

Look at the Figure 1 below and see how much cleaner the docMgt Work Triggers are in just a small workflow. Even with no extra validation checks you can already see a difference.

Figure 1: Simple Workflow
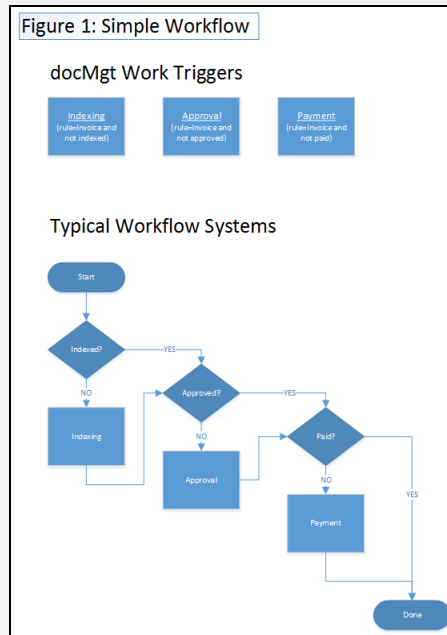
Now look at Figure 2 where we added extra checks to the workflow to validate that the index information exists at all times. The docMgt Work Trigger system already handles this check whereas the complexity of typical workflow systems grows exponentially.

Figure 2: Simple Workflow with Validation
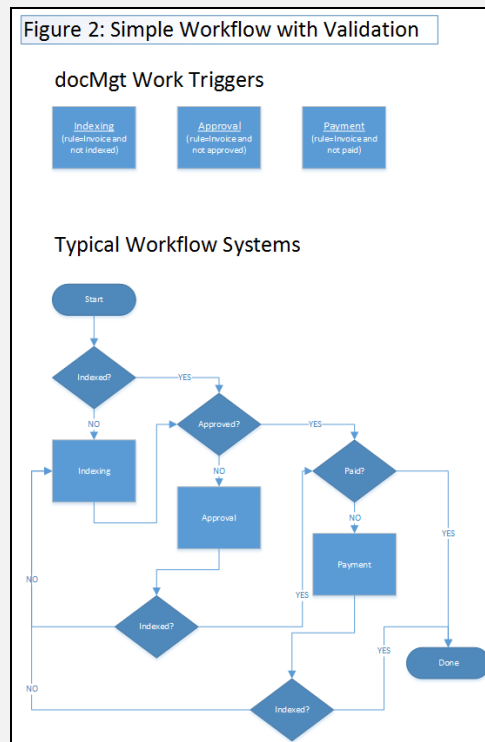
This is the added overhead for a simple 3-step workflow, just imagine what the affect would be on a large workflow example using the standard workflow method!