

HarvestRoad Hive: Workflow

HarvestRoad Hive's Workflow Engine makes it easy for groups of geographically or functionally dispersed people to work together to create, approve, and publish content items. It facilitates document and content authoring, collaborative authoring, and metadata generation. Workflows can be created and customised to meet the needs of any organisation.

Workflows are defined and customised by Hive administrators and made available to end users through association with item types. When a user selects an item type for an item, Hive associates the appropriate workflow with the item and the Workflow Engine begins to guide the item through its workflow. When the item completes its workflow, the item is published.

Workflow Architecture

The Workflow Engine is a component of HarvestRoad Hive. It guides and tracks items or processes through the steps in their workflows. A workflow consists of:

States (Steps): Workflows contain any number of linked steps. For each step, you specify the action that is to happen when a user Accepts or Rejects the step. In this way, you can define a flexible process that routes the item from user to user, from team to team, until the desired outcome is achieved.

Actions: Actions are the links between the steps. In normal, human-driven processes the actions are Accept and Reject. The workflow designer can specify whether the item proceeds to any other step, whether it is rejected to the person who initiated the object, and where it can re-enter the workflow.

Participants: Workflow teams consist of one or more users, roles or groups who are responsible for carrying out the actions in a workflow. Workflow teams can be re-used in multiple steps, and across multiple workflows.

Rules: Rules are associated with workflow teams. Rules specify how many users must perform each step in a workflow. The options are At Least, Any and All. For example, a rule can specify that at least two members of a workflow team must accept a step before it proceeds to the next step in the workflow.

Collaboration: Participants can check out and edit items and their metadata during the workflow, and share in the task of completing mandatory metadata elements. Collaborators can record comments at every step.

Setting up workflows

Create Workflow Teams: Select one or more groups, roles or users to form a team. Assign a rule to that team (see above) and nominate a group, role or user to send any error notifications.

Create Workflows: Create the “skeleton” workflow name and nominate a group, role or user to receive notifications of any major errors. Then edit the workflow to add one or more steps. Within each step, assign a workflow team to the task and optionally set time durations for sending task reminders and escalated alert notices. Once all steps are created, link them by assigning actions to perform when users **Accept** or **Reject** each step.

Assign to an Item Type(s): Once the workflow is created and all steps are linked, and have a workflow team assigned, create or edit an item type to use this workflow. Assign one or more workflows to an item type and specify whether workflow is mandatory or optional for the publisher of content who uses that item type. Specifying multiple workflows will offer the publisher a choice of workflows to select from when publishing content.

Using workflows: Workflow Monitor and Notifications

Hive sends email to users to alert them that a task awaits their attention. The notifications are in the form of pre-defined and customised email alerts and reminders.

All Hive users can access their task list, called the Workflow Monitor. Users select the task, then view the content, optionally edit it and check it back in, and then may enter comments about the item. They can then Accept or Reject, as appropriate. The rules in the workflow team for that step, together with the action specified in the workflow, will determine the flow of the item through workflow. Hive automatically escalates incomplete work if required. Administrators can force steps to complete and proceed to the next step.