

Course Description

Join us to learn the ins and outs of Onspring's Workflow feature. Workflow Bootcamp is for admin users who have completed Essentials and want to take their learning to the next level. Workflow is an all-in-one tool for facilitating a process within an app, enabling you to route records through defined paths for review, input, and approval. This functionality can streamline and enhance the automation of business processes within Onspring.

In this bootcamp, you'll receive training materials and login credentials for a dedicated Onspring lab instance. You'll learn the fundamentals of workflow automation in Onspring, You'll explore practical use cases and processes, dive into the nuances of workflow configuration, and gain hands-on experience in building an entire workflow process to automate the routing of content for review and approval.

Questions? Please email training@onspring.com.

Session Abstracts

Workflow Fundamentals

This session gives an overview of Workflow as a tool, helps the learner identify scenarios to which workflow is best suited, and explores a variety of workflow use cases. Emphasis is on understanding the specific functionality holistically before delving into the configuration.

Learning Objectives:

- Understand the capacities and capabilities of Workflow
- Identify use cases that are suited for Workflow and those that are not
- See Workflow's capabilities demonstrated in a variety of ways
- Learn the basic configurations of building a Workflow

Workflow Step Configuration

In this session, we will look at the specifics of workflow step configuration.. The learner will explore examples of the Start & Finish system steps, building custom Workflow steps, and configuring Workflow settings. This session will also cover access models and visibility settings related to Workflow records.

Learning Objectives:

- Learn to add and maintain custom workflow steps
- Identify the options of Workflow's basic settings
- Understand how to manage the visibility of Workflow records
- Utilize field settings appropriately within Workflow processes

Workflow Enrollment

This session will cover how to utilize both static and logic-based enrollment configuration. The learner will explore multiple use cases that delve into opportunities for complex Workflow configuration and enrollment logic, and the multiple paths to enroll particular records into a Workflow process.

Learning Objectives:

- Learn how to configure static and logic-based Workflow enrollment
- Utilize Onspring Logic to create accurate rule sets that match enrollment needs
- Apply knowledge of Workflow routing and paths to create enrollment logic

Workflow in Action

In this session you'll see the ways in which we “wire” our Workflow steps together and put the finishing touches on Workflow processes. The learner will also discover some strategies for testing a Workflow process, discuss the assignment of Workflow administrators and reviewers, and cover best practices for utilizing Workflow within Onspring. This session also demonstrates Workflow in conjunction with other functionalities, such as Surveys and Email Messaging.

Learning Objectives:

- Learn how to finalize a Workflow process
- Learn how to effectively test that a Workflow process is working as intended
- Identify best practices vs common pitfalls in utilizing Workflow
- Gain an understanding of how Workflow can be used in tandem with other Onspring functionalities