# Next Generation Integration Scorecard
## Workflow Functional Area

The Workflow Functional Area defines the means for managing the flow of work. This Functional Area is part of a functional cluster that includes the Resourcing Functional Area, the Tracking Tracking Functional Area, and Process Functional Area. The Workflow Functional Area provides an overall view of the flow of work through a process.

## *Process*

| A Process is a set of Steps in a workflow. Work entering a Process is assigned an initial Step and an initial State as defined by the Process. |
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| Both Processes and Steps may be operated through a set of rules to dynamically manage the workflow. |
| Also known as: Workflow |

❏ Read Operations for *Processes:*                                          *Score*

| | |
|---|---|
| ❏  Get Processes given unique Ids | |
| ❏  Get all the Processes in a system or Catalog | |
| ❏  Query (Search) Processes based on attribute-based query terms or keywords | |
| ❏  Register for notifications Processes have been created, updated or deleted | |

❏ Write Operations for *Processes:*

| | |
|---|---|
| ❏  Create, Update and Delete Processes | |
| ❏  Add an alias Id to reference an existing Process | |
| ❏  Add or remove competencies (learning Objectives) for Processes | |
| ❏  Organize Processes into Catalogs | |

Minimally Supported Attributes of *Processes:*

| |
|---|
| ●  A unique and permanent identifier |

| |
|---|
| ● The name of the Process |
| ● A description of the Process |
| ● The type of the Process |
| ● The provider of this Process |
| ● Any available branding for the provider of this Process, for example, an organizational logo or thumbnail |
| ● Boolean indicator as to whether this Process is enabled |
| ● The initial step of this process |
| ● The initial state of the work upon entering this process. The initial state is used to assign the work to an initial step that has this state as an initial state |

## *Step*

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| A Step is the primary component of a workflow Process in which work is performed. A Step may have required input conditions (or states) that permit Work to enter a Step. When the Work is completed at a Step, the Step defines the State transition of the Work. The valid next Steps in a Process is determined by the accepted input States of the other Steps. <br><br> A Step may have assigned Resources to perform the work. These Resources may be managed manually or through orchestration of the Resourcing Functional Area where the Process maps to a Job and the Work is the Work. |
| Also known as: *Task* |

❏ Read Operations for *Steps:*                                                    *Score*

| | |
|---|---|
| ❏ Get Steps given unique Ids | |
| ❏ Get all the Steps in a system or Catalog | |
| ❏ Query (Search) Steps based on attribute-based query terms or keywords | |
| ❏ Register for notifications that Steps have been created or updated | |

❏ Write Operations for *Steps:*

| | |
|---|---|
| ❏ Create, Update and Delete Steps | |
| ❏ Add an alias Id to reference an existing Step | |
| ❏ Add or remove competencies (learning Objectives) for Processes | |
| ❏ Organize Processes into Catalogs | |

Minimally Supported Attributes of *Steps:*

| |
|---|
| ● A unique and permanent identifier |
| ● The name of the Step |
| ● A description of the Step |
| ● The type of the Step |
| ● The provider of this Step |
| ● Any available branding for the provider of this Step, for example, an organizational logo or thumbnail |
| ● Boolean indicator as to whether this Step is enabled |
| ● The Process associated with this Step |
| ● The list of Resources working in this Step |
| ● The list of valid states to enter this step |
| ● The next state of the work upon completing this step |

# *Work*

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|---|
| Work is an abstract concept that indicates something to be worked on by Resources (workers) in a workflow Process. |
| Also known as: |

❏ Read Operations for *Works:*                                                     *Score*

| | |
|---|---|
| ❏ Get Works given unique Ids | |
| ❏ Get all the Works in a system or Catalog | |
| ❏ Query (Search) Works based on attribute-based query terms or keywords | |
| ❏ Register for notifications that Works have been created or updated | |

❏ Write Operations for *Works:*

| | |
|---|---|
| ❏ Create, Update and Delete Works | |
| ❏ Add an alias Id to reference an existing Work | |
| ❏ Move Work to another Process | |
| ❏ Mark Work as complete or incomplete | |

| ❏ Organize Work into Catalogs | |
| --- | --- |

❏ Operations for examining a Workflow*:*

| ❏ Get the list of Processes a Work is in | |
| --- | --- |
| ❏ Get the Step corresponding to a Work in a Process | |
| ❏ Get all the Work at a Step in a Process | |
| ❏ Get all the suspended Works in a Process | |
| ❏ Get the list of suspended Works at a Step in a Process | |
| ❏ Get the list of Works canceled in a process | |
| ❏ Gets the list of Works canceled in a Process within the given date range | |
| ❏ Get the statuses of the Work across all Processes | |
| ❏ Get the status of a Work in a Process | |
| ❏ Get the status of a list of Works in a Process. | |

❏ Operations for initiating Workflow*:*

| ❏ Get the list of available Work for this workflow. Available work is Work that is compatible with this Process but not currently part of this Process. | |
| --- | --- |
| ❏ Start a Work in the workflow at the initial step of a given Process | |

❏ Operations for workflow management*:*

| ❏ Suspend a Work in a given Process leaving it at its current step | |
| --- | --- |
| ❏ Resume a Work in a given Process | |
| ❏ Cancel a Work in a given Process, removing it from the workflow | |

❏ Operations for manually moving work through a workflow*:*

| ❏ Advance Work to the next Step in the workflow based on the Work and the input conditions of the next steps | |
| --- | --- |
| ❏ Get the valid next Steps in a given Process in which the given Work can be manually advanced | |
| ❏ Gets the all valid Steps in a given Process to which the given Work can be manually assigned and includes the Steps previous to the Work's current Step | |
| ❏ Manually assign a Work to a Step in a Process | |

Minimally Supported Attributes of *Work:*

| ● A unique and permanent identifier | |
| --- | --- |

| |
|---|
| ● The name of the Work |
| ● A description of the Work |
| ● The type of the Work: proposal, request |

## *WorkflowEvent*

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| Work moving through a Process can be examined using WorkflowEvents. Monitoring at a finer grained level can be performed by orchestrating within a system supporting the Tracking Functional Area where a Step is a Queue and the Work is an Issue. |
| Also known as: |

❏ Read Operations for *WorkflowEvents:*                                                                    *Score*

| | |
|---|---|
| ❏ Get WorkflowEvents given unique Ids | |
| ❏ Get all the WorkflowEvents in a system or Catalog | |
| ❏ Query (Search) WorkflowEvents based on attribute-based query terms or keywords | |
| ❏ Register for notifications that WorkflowEvents have been created or updated | |

Minimally Supported Attributes of *WorkflowEvents:*

| |
|---|
| ● A unique and permanent identifier |
| ● The name of the WorkFlowEvent |
| ● A description of the WorkFlowEvent |
| ● The type of the WorkFlowEvent: step transition, reassignment, new work, canceled work, completed work |
| ● The timestamp of this WorkFlowEvent |
| ● The Process |
| ● The Resource (worker) that caused this WorkFlowEvent |
| ● The authenticated Agent that caused this WorkFlowEvent |
| ● Boolean test if this work event indicates the work has been canceled the workflow and is not associated with a step at the time of this WorkFlowEvent |
| ● The Step at which the Work is in at the time of this WorkFlowEvent |

# *Catalog*

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| A directory or other kind of organization for learning objectives. Such a grouping serves to separate Processes managed by different organizations, office, or projects and to scope searches. |
| Also known as: *Office, Project* |

❏ Read Operations for *Catalogs:*                                                    *Score*

| | |
|---|---|
| ❏  Get Catalogs given unique Ids | |
| ❏  Get all the Catalogs in a system or Catalog | |
| ❏  Query (Search) Catalogs based on attribute-based query terms or keywords | |
| ❏  Traverse Hierarchical relationships between Catalogs | |
| ❏  Register for notifications Catalogs have been created, updated or deleted | |
| ❏  Register for notifications that hierarchical relationships between Catalogs have been created, updated or deleted | |

❏ Write Operations for *Catalogs:*

| | |
|---|---|
| ❏  Create, Update and Delete Catalogs | |
| ❏  Add an alias Id to reference an existing Catalog | |
| ❏  Manage Hierarchical relationships between Catalogs | |

Minimally Supported Attributes of *Catalogs:*

| |
|---|
| ●  A unique and permanent identifier. |
| ●  The name of the Catalog |
| ●  A description of the Catalog |
| ●  The type of the Catalog |
| ●  The provider of this Catalog |
| ●  Any available branding for this Catalog, for example, an organizational logo |
| ●  Any licensing (terms of usage) associated with this Catalog |