Migrate to a New Workflow

Workflow Wednesday Series #8

February 6 2019

Logistics

- 1st half of session is presentation and will be recorded
- 2nd half of session is discussion and will not be recorded
- You will receive the link to the recording tomorrow
- If question or comment put in the chat / question box

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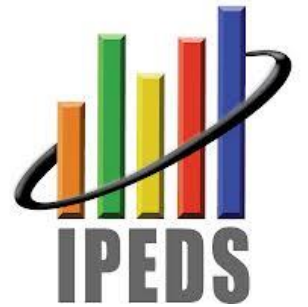
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Today's Session

As governance processes mature, it may be necessary to change a workflow. This session reviews the planning process and uses a demo to show 2 methods you can use to migrate items to a new workflow.

Agenda

- How It Works

- Supporting Features

- 2 Use Cases
  - Let things take their course
  - Force it

- Tips and Thoughts

How It Works

1. Objects remain trapped in the workflow in use at the time the Object was created

2. Workflows never die

3. Not all changes require a new workflow – relabel or swap User Group or change path? Read the Admin Guide or wait for the prompt.

Put another way…

An unapproved Object can remain in an old workflow indefinitely. It will successfully traverse the workflow when participants act.

How It Works Part 2

Choose 1:

- New Workflow *Version*
  - Click Create a New Version
    - Old workflow is locked down
  - Demo: Create version 3, HR workflow; 2 new definitions
  - Demo: get the prompt

- New *Workflow*
  - Click New Workflow
    - Archive old workflow
    - Don't Archive old workflow and it remains "available" and could be used, for real or for accident, at a later date
  - Demo: Create new Express Workflow

…Decide…based on what is easiest to understand and accept in your user community

Support Features

- Queues
  - let you push objects to next stage
  - Use to inventory objects within a workflow
    - Uncheck box "Available to Me"
- Export / Import
  - Delete definitions manually prior to re-import
    - Un-attach to all Specifications / then re-attach after import

2 Use Cases for demo Today

1. Let Things Take Their Course

2. Force Objects to Drafting Stage of New Workflow

For each method:

- Describe it

- List the Steps (planning)

- When to use it

Use Case 1 - Let things take their course

- Stewards need more editorial support. Definitions have inconsistent quality.
  - Workflow: Draft > Data steward > Technical Review > Approve
  - New workflow: Draft > Steward > Technical > *Standards* > Approve
  - Adding an editorial stage; not significantly altering the governance of the workflow.
  - YY definitions in current workflow, as shown by Definition Queue, most of them are in Technical or Standards, so let it play out.

Steps: Prep

- Get buy-in; an organic solution

- Use Queue to Inventory the counts in each Stage

- Decide: Create new workflow or version existing?
  - If version, you guarantee a lock down on no more use of previous workflow
  - If New Workflow, you could return to prior workflow by re-ordering on Workflow list page

Steps – Execute it

- Create and test New Version

- How to do that…what triggers a new version?
  - Create New Workflow button or make a "trigger" change

Steps – Build new workflow

- Create new version or new workflow

- Activate

- Test

Use Case 2 - Force It

- Use Case: starting March 1, a technical definition must be included. Prior, tech definition was optional.

- Current Workflow: Draft > Review > Approve

- New workflow: Draft > Review > *Technical* > Approve

- Goal: All Objects must version using the New workflow

Steps – Prep

- Use a communication plan
  - Policy change
  - Definitions' history deleted
  - Get more second opinions and buy in prior
- Schedule the work (off peak)

Steps – execute it

- Build and test new workflow or new version
- Export definitions
- Manually delete definitions and un-attach from specs
- Position new workflow
- Re-import as Drafting
- Re-attach to Specs

When to Use - 1 Let things take course

Use it:

- More tweak than substantial governance change
- Not many items are trapped

Drawbacks:

- Takes time for workflow to "expire" – need to keep checking on it
- Two similar workflows will be in play simultaneously – confusing?

When to Use – 2 Force It

Use it:
- Substantial governance change
- All items must reflect new process

Drawbacks:
- More work to process trapped definitions via Queue
- Creates "fake" version – confusing?

…Decide…based on your user community…

Tips and Thoughts

- Shop the decision – stewards, governance committee, 1 colleague
- Test in TEST
- Method choice is ultimately subjective; select what your community can best understand and accept
- Just Do It – the language can get fraught, but you are in charge!
- Build an Admin Override as an experiment
- Click the Object's version number to learn which workflow was used (demo this). Connection between Object at the version level and it's workflow is never broken.
- Note change in Workflow list in Queue with multi-versions

Summary

- Process:
  - Decide what to do
    - Inventory objects
    - Talk to people
  - Plan how to do it
  - Prepare new or versioned workflow
  - Prepare Objects if needed
  - Communicate
- Skills:
  - Queue
  - Workflow
  - Export / Import

Next sessions:

- March 6 – Approaches to Technical Definitions
- May 8 – Quality Rule Workflows
- June TBD
- July-August off

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Extra slides