

Ultimus[®]

Workflow for the Information Age

A Glossary of Workflow Terms

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A Glossary of Workflow Terms

API: Application Programming Interface. A set of software function calls which enable other applications to access features of a program.

ASCII Flobot: The program which enables the Ultimus workflow software to output data to ASCII files in a user-specified format.

Abort Incident: The termination of a workflow incident by a user or an event before its logical completion.

Abort Step: The termination of one step of a workflow incident by a user or an event before the step is completed.

Access Right: A privilege assigned to a user giving the user the right to access a particular feature of the software.

Activate: The invoking of a workflow step by the workflow engine.

Active Directory: Microsoft implementation of an LDAP directory service. The Ultimus Org Chart is tightly integrated with Active Directory.

Ad Hoc Routing: The ability to define workflow routing at run time rather than at design time. Routing can, therefore, be based upon user input or some other real time information.

Administrator: The workflow application which enables users to perform administrative functions.

Agent: A piece of software that performs a role in a workflow. Work tasks that are routine and do not require the intervention of a person can be automated as part of the re-engineering effort. See Flobot™.

anchors: Graphical annotations in a process map which enable links to change directions.

Anonymous Users: Workflow participants that do not reside in the workflow directory or Org Chart. This allows unknown users, typically from the Internet, to participate in workflow processes.

Assign: The ability to move a task from one user to another user. This can be done by the users themselves, or by the workflow administrator.

Asynchronous Hold: The ability for a workflow process to wait at a specific step for a response from an external source before completion. This is particularly important for integration with other applications.

Asynchronous Process Launch: The ability to launch a workflow process from within a process, and continue the execution of the parent process. See also Synchronous Process Launch.

Attachments: The ability to link documents, files, or images to a workflow process for routing.

Begin Step: The first step of a workflow process.

Business Process Automation: The use of computer-based information technology (specifically workflow technology) to automate the steps in a business process, coordinate the assignment and distribution of work items and information among individuals, and manage the completion of tasks, activities, and, ultimately, the business processes.

Business Process Redesign: The review, evaluation and redefinition of the tasks and activities that comprise a business process. The objectives of BPR is to develop more efficient business processes.

Business Process Reengineering (BPR): The act of analyzing an existing business process, judging its suitability for the existing business environment, and changing it radically. BPR and workflow automation are mutually exclusive; they can be done independent of each other.

Case: Same as Incident.

Chart: A graphical representation of the relationships between job functions in an organization. Also called an Organization Chart or Org Chart.

Client: The application which allows users to participate in workflow.

Client/Server: The relationship between machines in a communications network. The client is the requesting machine, the server the supplying machine.

COM+ Load Balancing: Mechanism for distributing server load evenly across multiple servers. This is done at the software component level for maximum performance and reliability.

Complete: The event which occurs when a workflow step has been completed.

Completion Time: The time allowed for a step to be completed.

Condition Tables: A method of representing logical conditions and actions in a tabular format.

Conditional Step: A step which is invoked only if some conditions are satisfied..

Conditional Recipients: The ability to select task recipients on a conditional basis.

Confer: The ability to send a task to someone else for their input or opinion without changing ownership of the task.

Database: Data that has been organized and structured in a disciplined fashion so that access to information of interest is as quick as possible.

Data Source: The name given by the ODBC Configuration Manager in Microsoft Windows to a database and the ODBC driver used to access it.

Data View: The view in the Ultimus Designer which allows users to design and modify spreadsheets which handle workflow data.

Designer: The application which enables users to design workflow processes.

Dynamic Groups: Groups which are created at run time based upon actual conditions.

Dynamic Link Library (DLL): The Microsoft Windows specification for linking program to share subroutines with an application at run time.

End Step: The last step of a workflow process which represents the logical conclusion of the workflow.

Engine: The Ultimus application which controls and coordinates workflow processes. Same as Workflow Server.

Escalation: The act of escalating late tasks up the chain of command to ensure that they are performed within the required time frame. Workflow software must escalate automatically if a step is late and the escalation follows the sequence specified by the workflow designer.

Excel Flobot: The program which enables the Ultimus workflow software to use Microsoft Excel to perform a task as a step in the workflow process.

Extension Time: The grace period allowed for a step to be completed beyond the specified Completion Time.

External Database: A user database that contains data that is accessed by a workflow process. This is separate from the workflow database.

File Flobot: The Ultimus program which enables the Ultimus workflow software to perform file functions such as copy, rename, run, and attach.

Flobot API/SDK: The Ultimus Application Programming Interface and Software Development Kit which enables application developers to write custom Flobots for their own applications.

Flobot™: An Ultimus program and concept which allows third-party applications to be trained and used to perform specific tasks at different steps in different workflow processes. Stands for “workflow robots.”

Flobot Step: A step which uses a third-party application such as Microsoft Excel, Microsoft Word, and others, to perform a task. See Flobot.

FloStation™: A computer on which Flobots are executed.

Form: The electronic page used to display information for a user, or to enable a user to enter information. Also called an “electronic form” or “E-form.”

Form View: The view in the Ultimus Designer, which allows users to design and modify electronic forms.

Form Object Library: Form Objects are a reusable set of controls that are grouped and will retain all their workflow and formatting properties. The form objects are stored in a file called a Form Object Library and may be used in different steps or different processes.

Grid: A field in the Ultimus form which allows data to be entered or displayed in a tabular fashion similar to a spreadsheet.

Groups: A collection of individuals or job functions who are required to do a task.

Incident: One occurrence or instance of a workflow process. Also called a “case.”

Incident Cost: The cost of one incident of a workflow process.

Incident Summary: Summary description for a workflow incident.

Incident Time: The time it takes to complete one incident of a workflow process.

Job Functions: The role assigned to a user in an organization. Users can have multiple job functions or roles.

Job Function Groups: A group of users who have the same job function or role. For example, Sales Engineers, Application Engineers, and Payable Clerks.

Jumps: The forced deviation of a workflow process from its normal sequence due to some exception or unique condition.

Junctions: Graphical annotation on a process map which shows a workflow path splitting into several paths, or several paths combining into one. Since junctions can also have conditions, they allow greater flexibility in designing workflow processes.

Key Field: A database field which uniquely identifies a record.

Links: Lines on a workflow map which join steps together and depict the flow of the process.

Link View: The view in the Ultimus Designer which allows users to graphically link workflow data to form controls.

Local Area Network (LAN): Computer communication network of connected devices within a small area, such as a building or group of buildings. High-speed transmission over twisted pair, coax, or fiber optic cables that connect terminals, personal computers, mainframe computers, and peripherals together at distances of about 1 mile or less.

Local Spreadsheet: The spreadsheet which is associated with a step in an Ultimus process. Every step in the process, except the End step, has a Local Spreadsheet. A Local Spreadsheet is linked to a form to provide user interface, and to the Main Spreadsheet for receiving and sending data to other steps in the process.

MAPI (Messaging API): A Microsoft published API that separates the client from the server functionality, allowing various clients, like mail front ends, word processors, and spreadsheets, to access the messaging capabilities of back-end mail servers, such a Microsoft Exchange Server.

Main Spreadsheet: The spreadsheet which is associated with the entire process in an Ultimus workflow process. It is used to gather and consolidate data from the various Local Spreadsheets.

Map View: The view in the Ultimus Designer which allows users to design workflow maps.

Named Cells: A cell in a spreadsheet which has been named. If a cell has not been named it is identified by its Row:Column address.

Named Range: A contiguous range of cells in a spreadsheet which has been named. If a range has not been named, it is identified by its Row:Column address.

Network Load Balance: The ability to distribute client access across multiple Web servers to balance the server load for scalability.

ODBC Flobot: The Ultimus program which enables an Ultimus-based workflow software to perform ODBC database functions such as read, write, delete, and query.

ODBC: Open Database Connectivity: A technology which allows desktop applications to work with many different databases. An ODBC compliant application can work with any database which has an ODBC “driver.”

Organization Chart: See Chart.

Periodic Initialization: Setting up a process which is initiated automatically after periodic intervals specified by the process designer. For example, a process may be initiated the first day of every month. Also known as Periodic Launch.

Process: A series of tasks performed by two or more individuals or resources in series or in parallel to reach a common goal. Also called business process, workflow, workflow process, or business workflow.

Process Cost Metrics: Statistical information about the cost of a workflow process and its individual steps.

Process Level Help: A help file that can be accessed from the Client to provide information and user help on a specific process.

Process Map: A graphical representation of workflow which displays the individual steps involved in the workflow process and the “flow,” or the sequence, of the process. Also called the “Workflow Map.”

Process Step: A step which represents a series of tasks which are performed by another process.

Process Time Limit: A specified maximum time (relative or absolute time) to complete a process. If violated, the process owner is notified.

Process Time Metrics: Statistical information about the completion time of a workflow process and its individual steps.

Query: To ask or inquire about something within a database.

Query Field: A database key which is used to search for a set of records which match some criteria.

Queue: A stream of tasks waiting in line to be executed.

Queue Time: The amount of time in which a case is waiting to be serviced, starting from the point that the task processing is started.

Rate: The hourly cost of the resource which has to perform the task at a step.

Recipient: The individual(s) who are called upon to perform the task for a step.

Relational Database: A database built and operated in accordance with the relational model of data which holds that all data be organized as a set of two dimensional arrays or tables which have a relation to each other.

RecordSet: A named set of related data records which can be linked to a set of controls in a form.

Rendezvous Routing: Rendezvous routing, or joining, allows the consolidation of workflow routes. Same as “junctions.”

Relationship Based Routings: The routing of workflow tasks to individuals based upon reporting relationships.

Repeating Step: A step which is repeated multiple times. UltimUS allows Process Steps to be repeated multiple times. This initiates multiple incidents of the called process.

Role-based Routings: The routing of workflow tasks to individuals based upon their roles or job functions.

Role: The responsibility assigned to an individual in an organization or a team.

Rule: A definition criteria that the system will evaluate to automatically determine an action or route taken by an incident at a particular point in a workflow process.

Script Flobot: The UltimUS program which enables the UltimUS workflow software to automatically execute VB compatible scripts as a step in a workflow process.

Sequential Groups: A group of users to which a task is assigned in a sequential manner. The task is complete as soon as the first user completes it. If a user does not complete the task in a specified time, it is removed from the user and assigned to the next user in the Sequential Group.

Server-side Script: An executable script that runs on the workflow server and is triggered by a user or automatically based on workflow conditions. Server-side Scripts retrieve and manipulate workflow variables and return the values to the workflow server when complete.

Show – Hide Controls: A feature to allow a form control to appear only when needed based on real-time conditions.

Signature Control: A field in an UltimUS form which allows users to enter signatures via passwords or some other validation scheme.

Simulation: The act of testing the behavior of a workflow process in the Designer before in stallion.

Splits: The breaking of a workflow path into one or more paths.

Step: A stage in workflow where a distinct, well-defined task is performed. Workflow consists of a number of steps from the start of a process to its conclusion.

Step Level Help: A help file that can be accessed at each step in a process to guide users on performing their task.

Sub-Charts: An organization chart within an organization chart. Sub-charts allow the creation of large organization charts in a structured, building-block fashion.

Sub-Forms: A form which is activated from another form.

Synchronous Process Launch: The ability to launch a workflow process from within a process, and stop the progression of the parent process until the called process is completed. See also Asynchronous Process Launch.

Task Cost: The cost of one step of a workflow process.

Task Time: The time it takes to complete one step of the workflow process.

Thin Client: Pure HTML Client allows any user with an HTML compatible browser to access the Client. Provides cross platform capability for the workflow client.

Thin Form: Pure HTML form to allows anyone with an HTML compatible browser to participate in workflow.

Training: The act of “programming” the Flobots (automation agents) to perform a specific task.

U2Net™: An UltimUS feature to allow UltimUS modules to communicate with the server using either HTTP (optimized for distance) or COM/DCOM(optimized for performance).

Unconditional Step: A step which is always invoked.

User Step: A step whose task is performed by an individual.

Version Control: The ability to maintain and use the proper version of a workflow process which has gone through revisions.

Weighted Groups: A group of users who are assigned a task based on weighted probabilities. Each user is assigned a “weight” or probability, such that their weight as a percentage of the total weights for all users in the group, indicates the workflow distribution to the user.

Wide Area Network (WAN): Communications network that links broad geographic areas.

Word Flobot: The program which enables the Ultimus workflow software to use Microsoft Word to perform a task as a step in the workflow process.

Workflow: See Process.

Workflow Database: The required database used by the workflow server to house workflow data, variables, user information, status, properties and other workflow related information.

Workflow Management System: An electronic system that includes workflow capabilities to route, schedule and control business processes. Same as Workflow Server.

Workflow participant: A resource which performs a task at a step in a workflow process..

Workflow Process Engine: See Workflow Server.

Workflow Process Monitoring: The ability to track the status of workflow processes during execution.

Workflow Manager: The individual(s) responsible for workflow processes. If a workflow incident “hangs,” the workflow manager is notified so that corrective action may be taken.

Workflow Map: See Process Map.

Workflow Process: See Process.

Workflow Server: A software service or “engine” that controls workflow processes. Also called the Workflow Process Engine.

Workflow Variable: A named data field used to hold process related data which can be used to real-time workflow decisions.

WorkLoad View: The display in the Ultimus Administrator which shows all the workflow tasks that a user has to perform.

XML: Extensible Mark-up Language. Becoming the de-facto standard for high-level application integration. Allows third-party applications to be easily included in a workflow process.

XML Flobot: The Ultimus program which enables the Ultimus workflow software to automatically exchange XML documents/data with another application.