

Parnassus Workflows & eForms – Overview Functionality in Parnassus v5.3

1 Scope

- A generic workflow tool for managing business processes, checklists and tasks.
- Available to AO and Centre Users.
- Turned off by default as setup is required. Please talk to GA if you are interested in using Workflows.

2 Workflow Key Concepts

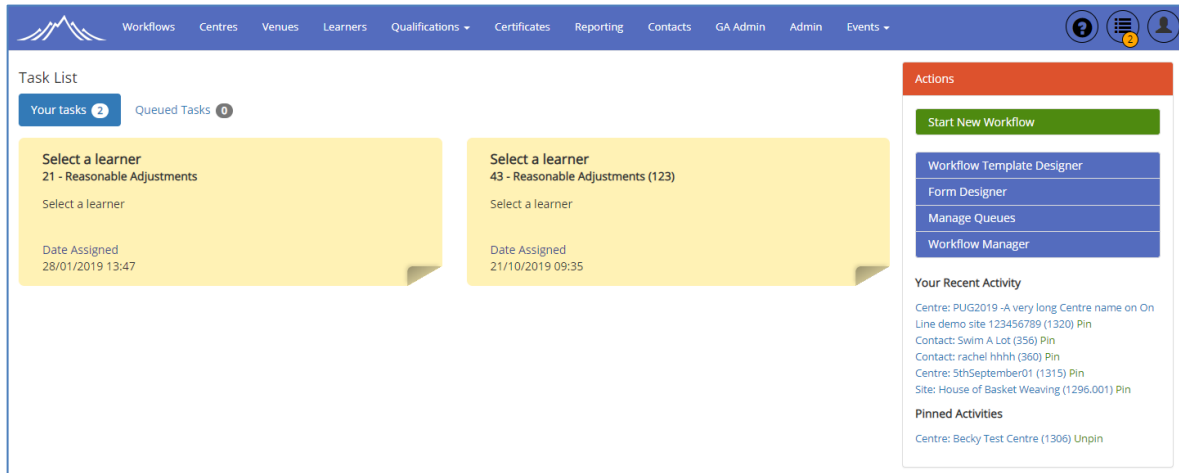
Item	Note
Workflow Template	Workflows are added to Parnassus as a Template. The Template defines the steps in the workflow. A workflow will have many steps. Each step can have multiple outcomes.
Workflow Code	Each Workflow is assigned a Code. Workflow Code is manually entered by the User creating the workflow.
Workflow Task Assignment	When building a workflow you can designate the User each task should be assigned to.
Workflow Queue	Users can be assigned to a Workflow Queue. When building a workflow you can designate a task is assigned to a Queue, rather than a User. Queues enable groups of Users to work together when processing Workflow tasks.
Publish	When a Workflow Template is complete it can be published to make it clear the workflow is ready to use. When a Workflow is published all instances of the Workflow are deleted. Unpublished Workflow tasks are displayed in red.
Version	You can create a new version of an existing Workflow, for example if the workflow changes or is improved. Workflows are assigned a Version number. When you create a new version of a workflow the Workflow Code becomes read only.
Active	A Workflow can be designated as Active. Active should be used when there is more than one version of a workflow to identify the Active workflow. Only one workflow can be active per Workflow Code
Copy Template	If you want to make a similar, but different workflow, use Copy Template.
Workflow Instances	When you want to start an instance of a workflow you simply "Start a new Workflow" from the list of Templates.
Workflow Tasks	When a Workflow is "in progress" the active steps of the workflow are displayed in Parnassus as Workflow Tasks. Workflow tasks can be viewed via the Task screen or the Workflow manager.

Notes

- 100% customisable
- Full Audit
- Full Traceability

3 Workflow Home Screen (aka My Tasks)

Parnassus Screen to view your Tasks, accessed via Workflow menu option or Task List icon.



Notes

- Task are displayed via two tabs; Your Tasks and Queued Tasks.
- Click the tab to view tasks
- Each task is displayed as a business card
- Click the card to open the task

4 Workflow Template Designer

Use the Template designer to build the Workflow; set the Workflow name and code and add tasks to the Workflow. A workflow task can have multiple, branching, outcomes, so care needs to be taken when building a workflow. It is recommended to write the workflow out as a flowchart before adding to Parnassus.

Workflow Template Editor

Workflow Title	Code
<input type="text" value="Qualification Development V4 -Copy"/>	<input type="text" value="QUALDEVT01 -Copy"/>
Version	Active Version
<input type="text" value="1"/>	<input type="checkbox"/>
Additional Title Text Prompt	Start From
<input type="text" value="Enter working title of Qualification here (if known):"/>	<input type="text" value="None"/>

Stage 1. Demand			
Task Outcomes	Display Order	Can be assigned to	Form
Qualification Development Proposal completed ... (Next Task: Stage 2. Approval) (emails : 1) Add New Outcome	101	Non Centre User	Qualification Development Proposal

Workflow Actions

Actions

- Save
- Add New Task
- Publish Template
- Create New Version
- Copy Template

4.1 Workflow Tasks

Task Template Details
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Task Title

User assignment rule

Instructions

Must associate workflow with entity

Select Form

Select task queue

Task Duration Rules

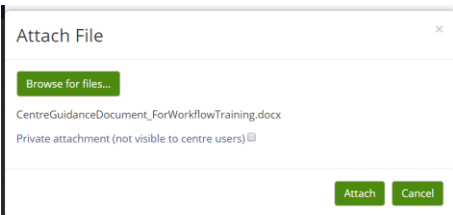
Days to complete task

Exclude Weekends

Display Order

Attachments

The key attributes of a workflow task are summarised below;

Attribute	Note
Task Title	
User Assignment	
Instructions	Displayed to the User when processing the Task
Must Associate Workflow With entity	
Form	
Task Duration – Days to Complete	
Tasks Duration – Exclude Weekends	
Display order	
Attach File	Attached files will be available to the user when processing the Task. Attachments can be Not visible to Centre Users 
email	Specify an email template to send for the task.

5 Form Designer

A form is a method of capturing data as part of a workflow

The screenshot displays the Parnassus Form Designer interface. At the top, a navigation menu includes: Workflows, Centres, Venues, Learners, Qualifications, Certificates, Reporting, Contacts, GA Admin, Admin, and Events. The main content area is titled "Workflow Forms" and features a search bar with the placeholder "Enter Search Criteria", an "Active Only" filter, and a "Search" button. Below this, three workflow forms are listed:

Form Name	Active	Published
Application for Reasonable Adjustment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Replacement Certificate Request - form sent	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Hot Drinks	<input checked="" type="checkbox"/>	<input type="checkbox"/>

To the right of the main content is a sidebar with an "Actions" section containing a blue "Add New Workflow Form" button. Below this is a "Your Recent Activity" section listing recent actions with details such as "Centre: PUG2019 - A very long Centre name on On Line demo site 123456789 (1320) Pin" and "Contact: Swim A Lot (358) Pin". A "Pinned Activities" section at the bottom of the sidebar lists "Centre: Becky Test Centre (1306) Unpin".

6 Manage Queues

The screenshot displays the 'Manage Queues' interface. At the top, a navigation bar includes links for Workflows, Centres, Venues, Learners, Qualifications, Certificates, Reporting, Contacts, GA Admin, Admin, and Events. The main content area is titled 'Manage Queues' and features a dropdown menu for 'Queue' with 'Test Queue01' selected. Below this, a section for 'Test Queue01' contains a 'Queue Name' field with 'Test Queue01' and two user cards: 'UserTest' (added 20/12/2018 12:10:40) and 'DarrenUser' (added 28/06/2019 15:56:46). A right-hand sidebar contains an 'Actions' panel with buttons for 'Create New Queue', 'Save Queue Name', 'Add User to Queue', and 'Delete Queue'. Below the actions are sections for 'Your Recent Activity' and 'Pinned Activities', each listing recent system events with details like centre names and dates.

7 Workflow Manager

View Workflow instances.

The screenshot displays the Workflow Manager interface. At the top, there is a navigation menu with items: Workflows, Centres, Venues, Learners, Qualifications, Certificates, Reporting, Contacts, GA Admin, Admin, and Events. On the right side of the header, there are icons for help, notifications, and user profile.

The main content area is titled "Workflow Manager" and includes a "Workflow Template" dropdown menu set to "All". Below this is a search bar labeled "Enter Search Criteria" and a green "Search" button. There are also checkboxes for "Active Only" (checked) and a dropdown for "Limit to workflows linked to" set to "Any / None".

Two workflow instances are listed:

- 12 - Reasonable Adjustments (Ameera Khan)**
Status: Active
Workflow Created: 11/01/2019 16:06:29
Current Task: Select a centre
Date Assigned: 16/01/2019 12:27:58
Queue/User: Paul - Admin
Entities Assigned To: Learner: 124050: Ameera Khan
- 17 - Certificate Replacement Request (Tomas Castillo)**
Status: Active
Workflow Created: 16/01/2019 12:27:46
Current Task: Has a completed form been received?
Date Assigned: 16/01/2019 12:29:03
Queue/User: Paul - Admin
Entities Assigned To: Learner: 124058: Tomas Castillo

On the right side, there is an "Actions" panel with two sections:

- Your Recent Activity**
Centre: PUG2019 - A very long Centre name on On Line demo site 123456789 (1320) Pin
Contact: Swim A Lot (356) Pin
Contact: rachel hhhh (360) Pin
Centre: 5thSeptember01 (1315) Pin
Site: House of Basket Weaving (1296.001) Pin
- Pinned Activities**
Centre: Becky Test Centre (1306) Unpin

8 Potential Further Developments

Feature	Detail
Forms; Publish/Copy/Version	
Forms; Populate form Parnassus data ie Reasonable Adjustment – fill in learner details form existing learner record	
Plugins to add Form data and linked entity to db	
View forms from Entity	
View workflow tasks from entity	
Workflow Template Editor/Viewer; Improvements to make it easier to see tasks and progress of a workflow instance	
Action Centre; Collapse/Hide	
Workflow/Form Templates; Export/Import functionality	
Queues; Email alerts on Queues	
Forms; Actions (EQA visit)	
Forms; Risk Rating responses & Sanctions.	