WORKFLOW MANAGEMENT

Lesson Plan - May 2, 2023 version

By the end of the *Workflow Management* course, the client and designated users will be able to perform all the necessary settings and actions to managing and using workflows in **maestro***.

Unit WORKFL01 - Preliminary Analysis

Date: Time: Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
The objective of this session is to clarify the needs, requirements, and usage conditions of workflows (approvals and notifications) in **maestro***. *PREREQUISITES* - *Security Management (for users implicated in the workflow);* - *Document Management;* - *The settings and training of modules limked to the implementation of the workflow must have already been done.* *OPTIONAL PREREQUISITE* - *Internal processes must have already been decided/set.*	- Analysis.	- Discuss the current and future process of managing workflows (strengths and weaknesses); - Decision-making. *HOMEWORK* - *Reflect on the discussions.*	30 min.		Pilot

Unit WORKFL02 - Settings Linked to Workflows

Date: Time: Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this training session, the client and designated users will be able to set up the necessary parameters and options to use workflows in **maestro***.	• Role Management; • Workflow Management; • Project Management; • Dashboard.	• Review previous concepts and validate tasks completed as homework; • Explain and complete the windows in **maestro*** that are linked to managing workflows, according to the client's needs and system requirements, to automate data entry. *HOMEWORK* • *Finalize data entry.*	1h	• Training document WORKFL02[1]	Pilot and/ou super users

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[1]This training document is under development.

Unit WORKFL03 - Workflow Management 101

Date: Time: Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this training session, the client and designated users will be able to set up workflows in **maestro*** and apply them.	• Update settings according to decisions that were made.	• Review previous concepts and validate tasks completed as homework; • User training according to the process established at the time of the analysis; • Demonstrate the different options and ways to use workflows in **maestro*** and approve transactions (**Dashboard** and/or inquiry windows). *HOMEWORK* • *Set up workflows according to the client's needs;* • *Practice entering transactions to activate workflows.* • *Approve transactions.*	1.5h	• Training document WORKFL03[1]	Pilot and/or super users

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[1]This training document is under development.

Unit WORKFL04 - Operational Training on Workflow Management

Optional Session - Training of the client's employees with the implementation specialist

Date: Time: Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this training session, the client and designated users will be able to set up workflows in **maestro*** and apply them.	• Update configurations according to the decisions that were made.	• Review previous concepts and validate tasks completed as homework; • User training according to the process established at the time of the analysis; • Demonstrate the different workflow methods and options in **maestro*** and transaction approvals (**Dashboard** and/or inquiry windows). *HOMEWORK* • *Set up workflows accordning to the client's needs;* • *Practice entering transactions to activate workflows;* • *Approve transactions.*	1.5h	• Training document WORKFL04[1]	Pilot Super user and/or users

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[1]This training document is under development.

Unit WORKFL05 - Analysis and Inquiry

Date: Time: Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this training session, the client and identified users will be able to use the **maestro*** analysis and inquiry tools linked to workflows.	• Dashboard; • Tab in transaction entries and supplier inquiry in transaction invoices.	• Review previous conceots and validate tasks completed as homework. *HOMEWORK* • *Validate workflows.*	30 min.	• Training document WORKFL05 [I]	Pilot Super user and/or users

Unit WORKFL06 - Form Validation

Date: Time: Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson the client will be able to use the standard **maestro*** forms defined to meet their needs.	• Different option forms linked to workflows.	• Purchasing; • Orders: stock order from catalogue, subcontractor, purchase order; • Requisition; • Etc. *HOMEWORK* • *Validate the accuracy of the forms.*	To be Determined		Pilot

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[I]This training document is under development.

Unit WORKFL07 - Tests and Validation

Date: Time: Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this training session, the client and designated users will have carried out the tests and verifications to validate the configurations made beforehand, and will be able to attest to the adequacy of these configurations with the established processes.	• Workflow Management.	• Review previous concepts and validate tasks completed as homework. • Test Assistance; • Validate reports and inquiries; • Review configurations, if needed; • Validate workflow steps. *HOMEWORK* • *Complete Integrated Tests.*	2.25h	• Training document WORKFL07[1]	Pilot Users

Unit WORKFL08 - Conclusion

Date: Time: Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this training session, the client will have shown they possess the nevessary skills and knowledge to use and manage workflows in **maestro***.	• Validate learnings; • Review the security settings applied to the module.	• Prepare future training sessions.	15 min.	Acquired competencies form - WORKFL[2]	Pilot

[1]This training document is under development.

[2]This training document is under development.