

Abstract: When looking at workflow applications and tools offered by vendors and system integrators, remember the applications are expanding on their maturity, not replacing core technologies. To ensure selection of the appropriate technology and application for your business issue(s), always try to follow the industry guidelines for document management technology evaluation and selection. The first activity described in these guidelines is the development of a detailed process baseline.

Whither Workflow

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During the first week of March 2002 at the Moscone Center in San Francisco, CA, the Association for Information and Image Management, (AIIM) held its annual Conference and trade show. While walking the show floor we had the opportunity to listen to numerous people asking various workflow vendors questions about their products and technology. Many of these people asked questions similar to:

"Why should I use Workflow, when I can implement E-Content, or E-filing to address my business Problems?"

"Isn't E-Commerce and ECM new and not as mature or stable as workflow?"

"What happened to workflow?"

Listening to the hype and jargon-laced responses from the vendors demonstrates the problem currently facing corporate and government organizations trying to determine which of the technologies will best suit their business problems and needs.

Just to make the an already murky situation even murkier, let us not forget that these technologies are often described by other names including but not limited to:

- E-Commerce
- Content Management
- B2B
- P2G
- G2G
- Knowledge Mgmt.
- EDMS
- ECM

I heard many questions at the AIIM conference in San Francisco, including, What is the difference between document management, document imaging, and workflow? This is a very common question with today's technologies and varied marketing approaches seen by industry vendors. As defined in the AIIM ARP Web-Based Document Management Implementation Guidelines:

"Electronic Document Management Systems (EDMS)" is becoming an all-encompassing term, referring to the integration of the underlying technologies including:

- Document imaging
- Document services
- Workflow
- Enterprise Report Management (ERM)
- Forms Management
- Optical Character Recognition (OCR)
- Intelligent Character Recognition (ICR)

While this provides an industry-accepted definition and cleared up some of the confusion, we heard several other questions including: What happened to workflow? Is this new technology mature? How do these technologies work together? In an attempt to answer these very valid questions, let's first consider the basic description of workflow and these "new technologies".

- Workflow is a technology enabling end users and organizations to manage their work processes in an automated fashion, while incorporating computerized "intelligence" to assist them in the determination of future and appropriate work processes and activities based on experience and previous actions.

Remember also that as the old saying goes: "new is not necessarily better, it may just be new."

These "new technologies" (i.e., e-Commerce, B2B, P2G, ECM, etc.) are really improvements, or different approaches, that vendors and integrators have found to implement workflow technologies as these technologies have matured. These "new technologies" are actually different user interfaces, applications, and tools that utilize the core workflow technologies in a more efficient and productive manner. They are not really entirely new technologies, but improvement and adaptations of core functions. For the most part, when organizations implement these "new technologies," they utilize a combination of portions of current document management technologies. When automated processed, or routing, is required, workflow technology is almost always incorporated at some level. This capability of using specific portions of document management technology has greatly matured over the past several years. This capability across the various technologies have always been available, but until recently, very few of these technologies had matured to the point of providing and meeting most organizational needs, AND provide true integration capabilities without significant custom design or development efforts.

To further describe how these technologies got to where they are today, consider the following key milestones of workflow technologies. In the very early 1980's, the first generation of workflow was introduced. These versions utilized the old "hard-coded, programmers only" development approach with little user controls, no standardized development libraries, no graphical process mapping, quite often proprietary database structures, etc. In fact, these versions commonly used analog monitor technology and were very, very restrictive in available functionality! The digital monitor technologies hadn't truly become available yet, but were just being considered by major manufacturers as something to seriously consider in the future. At this point in time, workflow technologies were used by manufacturing organizations to assist in component procurement and other "cost accounting" practices, along with automated training systems. These technologies were also beginning to be used by organizations for process approvals in large organizations.

The second generation of workflow (around the mid to late 1980s) began using generalized scripting

languages and common database architectures and structures (i.e., ODBC, SQL, etc.). User functionality greatly improved along with the ability to operate in Unix-based environments. The industry began to use PCs as a desktop station replacing the old analog monitors (commonly called VDT- Video Display Terminal).

The 3rd generation (around the mid 1990s) of workflow technologies began using graphical process designers; greatly improved administrative tools, and the beginning of "Web-enabled" applications along with the traditional desktop client installed on each workstation. The current generation of the core workflow components is now being touted as the 4th generation technology (late 1990's) and are quite mature and stable. This generation of technology incorporates Web-based tools, accessibility, and greatly improved functionality. These products all have graphical tools to develop the process maps, tools to monitor work (in some cases in real time), capabilities including data interchange, and various other standards which most of the workflow vendors have agreed to support and implement.

So, when one looks at the various applications and tools now being offered by various workflow vendors and system integrators, remember that their applications are not replacing the core technologies, but rather are expanding on their maturity. To ensure that you select the appropriate technology and application for your business issue(s), always try to follow the industry guidelines for document management technology evaluation and selection.

The first activity described in these guidelines is the development of a detailed process baseline. This process baseline differs greatly from most baselines commonly documented in today's business world. In most cases, business baselines document the various tasks associated with the department, or portion of the business, along with various database relationships and application dependencies. The workflow-based process baseline is developed from a different perspective; that being how the work flows through the organization. This should include all decisions, when the document is copied, stapled, stamped, put into folder, shared with other users, returned for more processing, how the users keep track of their individual work, etc. This baseline will provide an invaluable tool to the management team when determining where technology will fit, and where organizational change is required. Try not to get caught up in this year's buzzwords, but look at the new approach/application being offered as a tool, which in most cases are highly effective to resolve specific business issues.

In future columns, we will review and discuss issues surrounding workflow technologies. Questions and comments are highly encouraged and will assist us in addressing those items of the greatest interest to the readers. Please send your comments and questions to rblatt@eid-inc.com.

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