

Introduction to Workflow

Practice*Evolve* PLUS



The introduction to workflow is conducted online with the staff who are tasked with coding workflows in your firm. The main objective of the training is to provide you with an overview and information on the types of features available within the workflow system, so that you can plan out draft workflows in preparation for the advanced workflow workshop.

Online introduction and overview | Duration: 1 hour

Training Topics
Overview of tasks in PE
Core workflow elements <ul style="list-style-type: none">Schedule a task, create a new document, and update a field on a matterTask delays
Start a workflow manually or automatically
Overview of core structural elements and using them to refine your workflows to: <ul style="list-style-type: none">Run tasks parallel to other tasks (Branch Parallel)Escalate tasks that have not been completed (Branch Deadline)Select relevant tasks from within a set of tasks (Branch Multiple Choice)Run tasks conditional to a matter attribute, or other relevant criteria (Branch Conditional)Repeat a task (Loop Yes/No)Sub-workflows

Training Requirements

TeamViewer access: the training will be conducted online via TeamViewer, using your live system.

A computer at your office with PE installed: Please ensure that the correct version of PE has been installed by your IT department prior to training.

Attendance Type	Targeted to	No. of Attendees	Duration
Online	Workflow Administrators	3P (maximum)	1 hour