

## **Appendix G: Functional Requirements: Business Process Management**

**GENERAL QUESTIONS** *(If possible, please limit responses to one page or less.)*

- A. Briefly describe your workflow building tools. Is it a graphical interface? What level of technical ability is required to create new workflow processes?
- B. How does your BPM integrate with the rest of the ECM? Is the interface standard or does it require independent development/implementation?
- C. What features/benefits set your products/services apart from your competitors in the area of business process management? Provide specific examples and explain why your solution is the “right” solution for the California AOC, Courts of Appeal and Supreme Court.

## DETAILED REQUIREMENTS

### Response Key:

1	Item is "Out Of Box"- indicate module
2	Item will be included in future release - specify version and date
3	Item addressed by 3rd party integration- specify partner
4	Item requires customized code to be written- estimate level of effort and cost
5	Item not addressed by solution

### G1. Business Process Management

ITEM	REQUIREMENT	RESPONSE	COMMENTS
G1.1	Ability for authorized non-technical users to create and manage workflow processes. No scripting or programming shall be required.		
G1.2	Ability for non-technical users to configure notifications to various roles/individuals based on workflow status.		
G1.3	Ability to alter or override workflow dependencies to meet real-time needs (eg re-route workflow tasks).		
G1.4	Ability to assign workflow to classes of content items as well as roles and individuals.		
G1.5	Ability to escalate workflow items.		
G1.6	Ability to establish a variety of roles within a workflow process.		
G1.7	Ability to grant or withhold specific workflow permissions based on role, type of content item and other criteria.		
G1.8	Ability to include authenticated external users in a workflow.		
G1.9	Ability to manage user feedback generated through the submission of forms.		
G1.10	Ability to reassign workflow items.		

ITEM	REQUIREMENT	RESPONSE	COMMENTS
G1.11	Ability to review, approve and process content items held in any identified repository, including documents, web content, templates, forms, images, video content, 3D drawings, PDF files, etc.		
G1.12	Ability to setup proxy workflow and have that proxy workflow invoked automatically based on AOC business rules.		
G1.13	Ability to view the status of a content item through the workflow process.		
G1.14	Embedded "dashboard style" notifications- allow users to receive feedback regarding workflow tasks within the software interface		
G1.15	Provide for ad hoc workflow routing.		
G1.16	Provide a workflow approval process that is configurable to support review and approval of template and design creation.		
G1.17	Provide a workflow approval process that is configurable to support varying content item status during the authoring process (eg draft, awaiting approval, approved, published, archived etc)		
G1.18	Provide a workflow approval process that notifies the appropriate persons when they need to perform a task in relation to an item (eg approval required).		
G1.19	Provide a workflow approval process that supports parallel approval steps.		
G1.20	Provide a workflow approval process that supports sequential approval steps.		
G1.21	Provide a workflow that is configurable to allow different approval processes based on how		

ITEM	REQUIREMENT	RESPONSE	COMMENTS
	quickly the content item is to be published (eg routine or urgent).		
G1.22	Provide a workflow that is configurable to allow different approval processes based on the type of content item/template being created (eg news or policy).		
G1.23	Provide a workflow that is configurable to allow different approval processes based on where the content item is being published (eg Intranet, Extranet and Internet).		
G1.24	Provide a workflow that is configurable to allow different approval processes for different businesses within the AOC.		
G1.25	Provide a workflow that is configurable to allow different approval processes if the content item is external (eg content received from external source may have a different approval cycle).		
G1.26	Provide notification mechanisms that include email and integrate with Microsoft Exchange. Notification via email is optional for users.		
G1.27	Provide preconfigured workflow options that allow for different approval processes depending on AOC requirements and business rules.		
G1.28	System shall support "push" alerts for content. This shall allow a project manager, for example, to indicate when his team shall receive updates based on changes per a set of defined criteria.		
G1.29	System shall support subscription based alerts for content by internal or external users. This shall enable a user to indicate that he/she would like to receive an alert based on specified criteria		

ITEM	REQUIREMENT	RESPONSE	COMMENTS
	related to a single piece of content, grouping of content, etc. For example, a user might want to be notified if content within a certain collaborative area changes, if a document is updated, if a discussion board is updated, etc.		
G1.30	System shall provide the ability to handle errors within the routing of work through a workflow engine, and the ability to pre-define a role to receive erroneous items.		
G1.31	System shall have the ability to establish timers for workflow items, and allow the user to set time-out values for specific activities.		

*END OF APPENDIX*