



# RSA Archer Weekly Free Friday Webcast : Workflow

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# Agenda

- What is Workflow?
- Stages
- Assignment Criteria
- Assignment Models
- Workflow Notifications
- Enrollment Models
- Record Copy
- Inactivate Workflow
- Demo

# Workflow

- Enables an organization to define a process for moving a record through stages for review and validation before publishing it to end users.
- Workflow can be enabled on any application, any level of an application and on questionnaires
- Workflow involves establishing stages, the order to route content, assigning reviewers at each stage and configuring workflow notifications.

# Workflow

- When you enable Workflow for an application or questionnaire, the system will add several fields off the layout to help manage the workflow process.
  - **Workflow Stage:** read only field that displays the current workflow stage
  - **Workflow Comments:** allows user to provide comments for individual records
  - **Workflow Assignee:** read only field that displays the user currently assigned to review the record
  - **Workflow History:** maintains a change history for each record

# Workflow Actions

- **Accept** – saves changes made to the record and advances it to the next stage in the workflow process
- **Reject** – saves changes made to the record and demotes it to the previous stage in the workflow process
- **Comment** – opens a discussion forum dedicated to the current record allowing users to make comments
- **Reassign** – enables Application Owners to reassign the record to a different user.
- **History** – displays a history log of the record while in the workflow process

# Stages

- By default RSA Archer provides a Start Stage and an End Stage
- It is up to the Administrator to configure the review and validation stages
- You have the ability to create new stages or copy existing stages from that application only.
- Administrator gives the stage a name and then configures the different properties of each stage

# Assignment Criteria

- Specify default Assignees
- Configure rules to automatically assign the record to a reviewer
- Multiple rules work cumulatively
- Assignee can be a static user, group or user populated in a Record Permission or User/Group field
- If no rules evaluate to true, the default assignee(s) will be assigned

# Assignment Model

- Round Robin – Automatic assignment model that will randomly assign content to qualified users
- Multiple – Edit Owner – Multiple reviewer model where the first user to make edits and save the record then becomes the owner
- Multiple – Concurrent – Any qualified user can accept the record and move it to the next stage



# Additional Stage Properties

- Read Only Stage – allows users to view the content, but not edit the content. Reviewer can only accept or reject
- Rejection Reason – when enabled requires the reviewer to post a comment to the record when rejecting a record.
- Comments – allows reviewers to post and reply to comments when a record is under review

# Workflow Notifications

- Email Notifications that will automatically be sent to the users that are assigned to the record in review.
- Email notifications are sent when:
  - A record is enrolled in workflow
  - A record moves to a new stage (except the End stage)
  - A record is manually reassigned by an Application Owner
- Same notification can be used for multiple stages or each stage can have its own unique notification

# Enrollment Models

- All Records – Automatically enrolls all new and updated records within that application
- New Records Only – Automatically enrolls all new records within the application
- Updated Records Only – Automatically enroll records that have changed (does not include new records)
- Create Record Copy – Enrolls a copy of the original record in workflow, leaving the original version in place.

# End Stage

- Define the Completed Status Name
- Completed Record Access
  - Standard – removes any access restrictions applied while the record is enrolled in workflow. Access will be controlled by the rights granted in the other record permission fields.
  - Public – records will be accessible to all users when records are released from workflow
  - Private – grant access to selected users or groups when records are released from workflow

# Other Workflow Actions

- Inactivate Workflow – on the Start stage update the Status field to “Inactive”
  - Cannot inactivate workflow if records are enrolled in any stage
- Delete a Stage – click on the Stage and then click on the red “x” in the upper right hand corner of the stage
  - Cannot delete a stage if records are enrolled in that stage
  - Stage is not completely deleted until you click Save or Apply on the application

# Things to keep in mind

- Record permissions still apply for records within workflow
- If Workflow is configured to use a copy of the record, upon publishing the record at the end, any changes made to the record while it was in workflow will show in the History Log field as being performed by the user that published the record.
- If Workflow does not use a copy of the record, any changes made to the record while in workflow will show in the History Log field as being performed by the user that made the change.

# Questions?

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# Upcoming RSA Events

- RSA Archer GRC Roadshow – Philadelphia, Jan. 29

– **Register Now:**

<https://community.emc.com/docs/DOC-19114>

- RSA Conference 2013 – San Francisco, Feb. 25 –  
March 1 @ Moscone Center

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# Thursday Public Webcasts (non technical)

## Topics in January include:

- January 17 @ 2 ET BCM for Financial Services
- January 24 @10 ET New BCM and BCM Mobile Solution

Register on the public web site at:

- <http://www.emc.com/campaign/global/rsa/rsa-webcast.htm>

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### *Instructor-Led*

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## End User

### *elearning*

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- Navigating the RSA Archer Platform

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- **RSA Archer Live Webcasts, for the public**
  - Live product webcasts are held on Thursdays at 2:00 ET. Also, these webcasts are recorded and placed on the Archer Community.

# Contacting Support

- Email:

[archersupport@rsa.com](mailto:archersupport@rsa.com)

- Phone:

USA: 1-800-995-5095 (option 5 for Archer)

Global numbers:

<http://www.emc.com/support/rsa/contact/phone-numbers.htm>

THANK YOU