

Workflow System Requirements

In order to improve the process surrounding creating, maintaining, and deleting programs and courses, a workflow system is needed to manage the process and maintain a web based “presence” for the proposed changes and supporting documentation. General functional requirements for this system follow.

1. Web based online reporting providing any interested party with the status of any proposal within the defined process.
2. Pro-active reporting of the status of a proposal as it changes to all previous approvers as well as the initiator.
3. Pro-active reporting to each approver for a given step in the process that the proposal is now available for him/her to approve.
4. Proposal forms to be edited for mandatory information and blocked from progressing until all mandatory information is available.
5. Form creation and editing as well approval and proposal viewing by interested parties must require only an approved web browser which will operate across operating system platforms.
6. Communications from the workflow system must be via text only email. These communications would be for the purpose of telling the recipient where to go on the system web site to view new proposals in their college, or approve proposals to their attention or to obtain proposal status.
7. A proposal maintained by the system must be able to be a complex document consisting of a form and supporting electronic documents such as word processing documents, spreadsheets, presentations, Web sites, etc. The system must be able to link proposals together to be treated as one for purposes of moving through the process and being approved together or rejected together.
8. The system must assign a proposal identifier which remains with the proposal throughout the lifecycle of the process.
9. Each proposal will have a “proposal manager” in addition to the initiator and approvers for the purpose of “shepherding” the proposal through the process when needed. This “manager” will automatically be informed of passing deadlines without status change plus follow-up reminders at designated time periods. This function should be transferable to a new person depending upon the stage of the proposal.