

COE In-a-box Project - Flow Documentation

DSC In-a-box Project

Objective

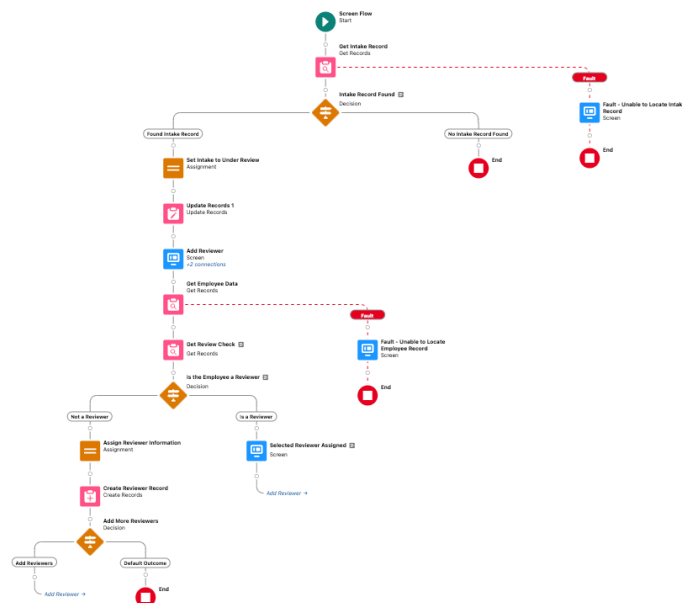
Document the Flow processes

COE Process Flows

1. *INTAKE - INITIATE INTAKE REVIEW

Description: This screen flow is used to assign reviewers (records in Employee object) to the Intake Review object

Diagram:



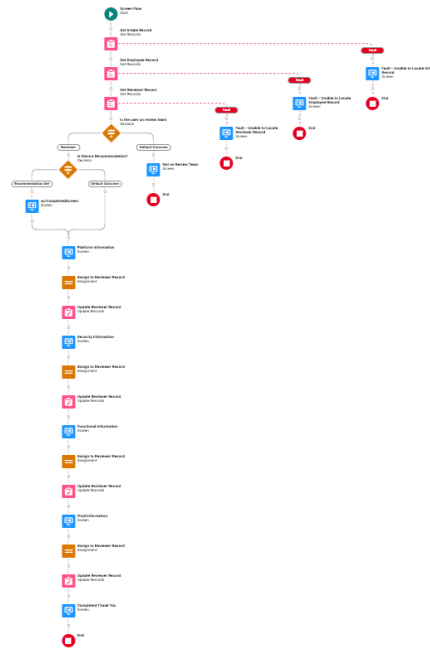
High Level Walk Thru:

- Intake record Id is passed into the Flow and used to get the full record
 - If no record exists, notify user of fault and exit flow
- Update the Intake record to place it in the “Under Review” status
- Display to user screen to search for Reviewer in Employee record - continue until all Reviewer are add
- Check to see if the selected Reviewer is already assigned
 - If Reviewer assigned, notify user of error and allow to enter other Reviewers
- For new Reviewer create a new Intake Review record assigning Intake record, Employee (Reviewer) record, and Employee Email
- Continue until all reviewers entered

2. *INTAKE - REVIEW PROCESS

Description: This screen flow guides the reviewer through a set of questions for the review process. Each review questions is a field on the Intake Reviewer object

Diagram:



High Level Walk Thru:

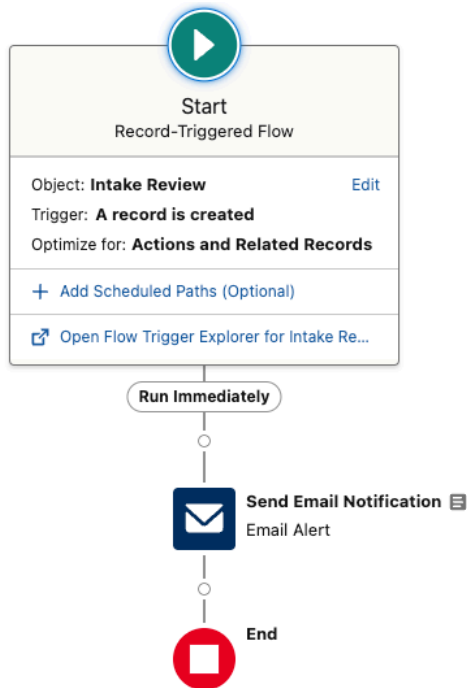
- Intake record Id is passed into the Flow and used to get the full record
 - If no record exists, notify user of fault and exit flow
- Get the Employee record for the user currently logged in to determine if they are a reviewer
 - If no record exists, notify user of fault and exit flow - this indicates the User logged in does not have a corresponding Employee record
- Get the list of Reviewer from the Intake Review record associated with the Intake record
 - If no record exists, notify user of fault and exit flow
- Check to see if the Employee is a Reviewer on this Intake
 - If Employee is NOT a Reviewer simply notify user and exit
- Check to see if the Intake Review record has an existing recommendation from the Reviewer (this means they have completed the review process)
 - If a recommendation exists, display current recommendation to Employee, allow to updated review
- Review platform information and then update Intake Review record
 - NOTE: each section is reviewed to allow reviewer to leave at any point and know there is a partial review started
 - NOTE: if reviewer is updating a started or completer review all existing input from reviewer will be displayed as the current default, to help expedite process
- Review security information and then update Intake Review record

- Review functional information and then update Intake Review record
- Review final information and then update Intake Review record
- Display thank you at the end

3. *INTAKE - REVIEWER NOTIFICATIONS

Description: This triggered flow executed when a new Intake Review record is created. The execution simply sends an email to the assigned reviewer

Diagram:



High Level Walk Thru:

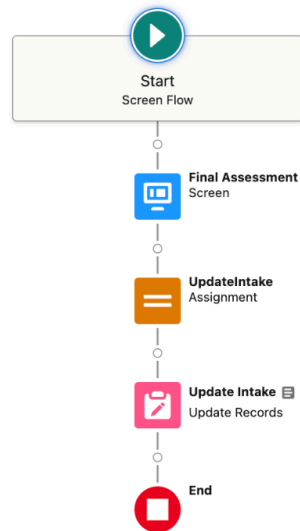
- When a new Intake Review record is created start flow
- Send Email Alert is executed
 - Current Intake Review record ID
 - Email Action (Email Alert): *Intake - Review Email Assignment
 - Recipient Field - Intake Review record Reviewer Email field
 - From Email - Current User
 - Email Template: COE Reviewer Notification
- Complete

4. *INTAKE - FINAL ASSESSMENT

Description: This is a simple screen flow that shows up on the Intake record page layout when the Status changes to **Review Completed**.

It allows the reviewer to provide their final recommendation along with the platform of choice and justification reason. The flow will then update the status and fields within Intake.

Diagram:



High Level Walk Thru:

- The Screen Flow is displayed when the status of the Intake changes to **Review Completed**
- The screen captures the following information
 - Final Decision
 - Justification
 - Platform Choice
- The screen elements are saved to a variable (IntakeRecord)
- The Update element updates Intake fields based on what is captured in the screen flow:
 - Status
 - Justification
 - Platform Choice