

REWST WORKFLOW DESIGN WORKSHEET

Use this sample worksheet to design a workflow of your own. Create a copy and after reviewing the example, fill out the template below. Delete stuff in [brackets] and italicized 'tips' (like this one) when you're done!

STEP 1: WORKFLOW GOALS AND PROCESS NOTES

[Example] Workflow Title: Add or Remove User – Microsoft Group

Automation Goal:

- Add a user to a group, or remove them from a group, using Microsoft Graph API to automate the relevant action (either adding or removing the user).

Starting Point (Automation Trigger):

- **Current State:** a hot mess. Requests come in via helpdesk ticket, phone call, MS Teams chat/message...
- **Ideal State:** a Rewst form (will get us the info we need and provide consistency to the process)

Process Steps and Tools: [Remember, tools need an API integration that works with Rewst!]

- **Steps:** Log into Azure AD/Exchange Online environments, get the user ID, get the group ID, update their group membership.
- **Tools/Integrations:** Microsoft Graph, Microsoft Exchange Online

Automation Success:

- **Desired Outcome:** User membership is updated (added or removed).
- **What Success Looks Like:** time saved for technicians; fewer errors (due to manual entry/typos); reduced “wait time” for customers/shorter time to close tickets
- **How to Measure:**
 - Rewst: Time Savings (add it to workflow configuration... it'll show on the dashboard)
 - Helpdesk: Reduction in customer calls/tickets about this type of request (compare a month's worth of data before/after automation)

[Template] Workflow Title:

Automation Goal:

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Starting Point (Automation Trigger):

- Current State:
- Ideal State:

Process Steps and Tools:

- Steps:
- Tools/Integrations:

Automation Success:

- Desired Outcome:
- What Success Looks Like:
- How to Measure:
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STEP 2: COLLABORATE AND UPDATE YOUR PROCESS NOTES

Work with your stakeholders to gather requirements. Talk with the people who know the process best to understand common issues, weird exceptions, and gaps. The goal is to refine the details and develop a clear workflow sketch or design table.

STEP 3: WORKFLOW SKETCH (DIAGRAM OR DESCRIPTION OF INPUT, STEPS/CONDITIONS, OUTPUT)

Use the methodology that works best for you. Sketching, pseudocoding, and flow state diagrams are common ways to bring your process into existence. Something as simple as a bulleted list or table also works in adhering to Aharon's Law. Below is an example of using a table to outline an automation and a template for you to use.

[Example] Workflow Title: Add or Remove User – Microsoft Group

Process Step	Description	Technical Notes
Input	<p>Rewst form is submitted, capturing user ID, group ID, and action (add or remove).</p> <p>Set up “form submission” trigger in Rewst workflow.</p>	Bob should attend that training on Rewst forms.
Step 1 (<i>insert more rows as needed</i>)	<p>Determine the action (add or remove).</p> <p>This step connects to 1 of 2 possible next steps.</p>	I heard we can use a noop. I think it’s pronounced ‘newp’
Step 2	1 of 2 possible steps: Add User to Group	Use Microsoft Graph API, check if there’s an action in Rewst and if it needs parameters.
Step 3	2 of 2 possible steps: Remove User from Group	Use Microsoft Graph API
Step 4	<p>...Insert more rows as needed for steps.</p> <p>This example doesn’t need it yet.</p>	
Output	User is added to group, or removed from group	Workflow execution results...I wonder how we can output a message? Maybe send an email?

[Template] Workflow Title:

Process Step	Description	Technical Notes
Input		
Step 1		
Step 2		
Step 3 (<i>insert more rows as needed</i>)		
Output		