

Getting the best out of GradeMaker Pro

WORKFLOW

What is workflow?

Workflow is our term for the series of steps to create an item or paper – from when the author starts writing, through the stages of review and editing, to final approval. Controlling the workflow is at the heart of good test development, and GradeMaker offers powerful tools to help you do this.

Workflows typically comprise four types of activity, sometimes repeated more than once:

- **Setting** – this is the author who might be originating the content or making corrections. Only one person can be allocated to an authoring step. If multiple authors work on an item or paper, then the transfer function can be used to move the work between them until they are happy with the content.
- **Reviewing** – reviewers can comment and make recommendations, but they can't make changes. Multiple reviewers can be assigned to a reviewing step. The item/paper will not move forward until all reviewers have completed this step.
- **Approving** – approvers can edit and correct items. They can also, if allowed, introduce new steps. Multiple approvers can be allocated to a workflow. Any one of the approvers can complete the approval step and initiate the move to the next step; they can also send back the work to the author for changes.
- **Typesetting** – this is for papers which are ready for final layout. This is a special step which allows the upload of a final print version of the paper. Once an upload has happened the system will lock the content for editing and final adjustments to the print layout can be made offline.

Content moves through the workflow steps sequentially.

Senior approvers will also have access to the 'My teams' reviewing and approving' folders. This allows them to see work in progress. Using this feature senior approvers can open items/papers in a review stage and add comments. They can also close the review stage. This can be used if one of the review team becomes unavailable and they need to move the item/paper onto the next step, for example.

Once items or tests are ready, workflow may then send them in different directions, for example to:

- Pre-test – so items can be trialled for final approval and item banking
- Item bank – for items which are approved
- Typesetting – for papers which are ready for final layout
- Exam ready – for papers which are ready for print or delivery online
- Archive – for materials which are going direct to the library of 'used' exam materials

What does it let you do?

The workflow tool in GradeMaker Pro lets you set up your approval process for item and paper development and assign dates and people to the individual tasks.

Each workflow can have as many steps as you like, and you can give each step a name (e.g. 'Reviser Review', 'Scrutiny' etc.). You can specify if a workflow is for one subject only, or for all.

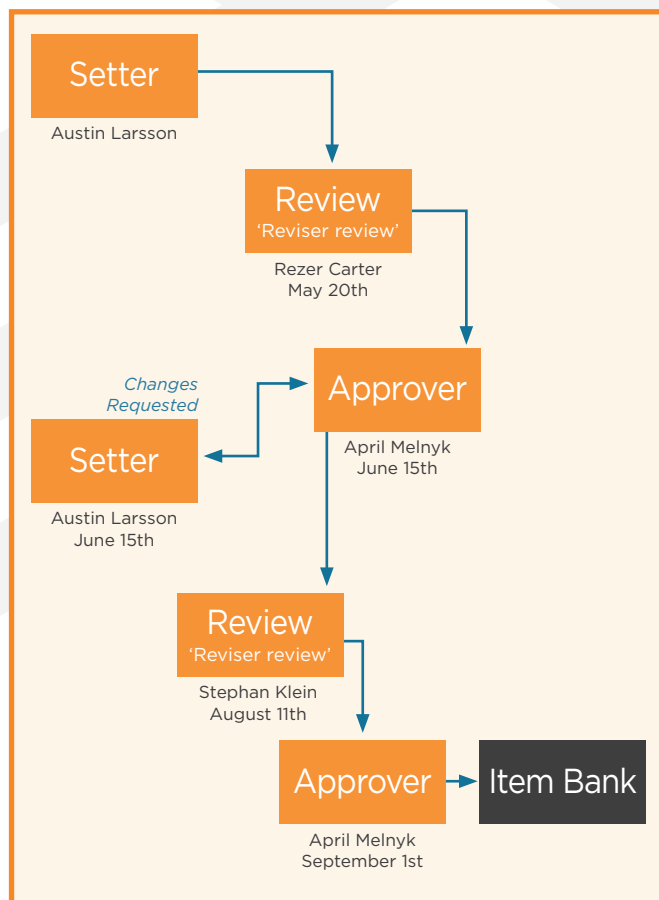
When items or tests are created, they can then be linked to workflows so you can control the path they take through development.

Workflows also let you decide who should do which task, and when it should be completed. This enables you to manage content production.

You can add **users** to each step (for example John Smith will carry out the Reviser Review step), so your content automatically goes to the right user.

You can add **dates** to workflow steps. This means:

- Users get notified when they have a task coming up
- You can see progress, and see which items are on track and which are running late.



If a user becomes unavailable and you want to re-allocate work, or if you need to change the milestone dates for work, you can do this within the system.

You can also add Quality Assurance (QA) Forms - quality checklists - and attach them to workflow steps so users are automatically assigned these forms to fill in when they do their jobs. Awarding Bodies find these useful because they prompt authors, reviewers or approvers to check a paper or item's content and ensure it aligns to their various quality standards.

And finally, if you are using workflows then you can take advantage of our Project Management feature which provides a graphical summary of the current status of all your content as it progresses through its development. The visual dashboard makes it easy for subject administrators to identify where items or papers are running late, and it is then quicker to intervene to address these issues.

Things to consider

- We highly recommend working with your GradeMaker consultant to map your existing internal processes to the GradeMaker Pro workflow template, particularly if you are using a customised workflow. This will ensure that the workflow functions effectively for your organisation.
- When assigning users to paper or item workflow steps, it is important to ensure that all relevant user accounts are activated before doing so. If a user is assigned to a step on a workflow but their account is inactive when the item or paper is sent to them, the user will not be authorised to view it in the system.
- Users are given visual warnings and sent a notification when an item or paper is almost due, i.e. when the deadline date set for a particular workflow step they are assigned to is approaching. The number of days before a due date that an item/paper is identified as being 'due' can be configured as required.
- If you need to amend the due date or users assigned to future workflow steps, this can be done by those who have a Central Admin/Project Manager role. There is also the option to do a bulk update of users on future workflow steps if a user is assigned to a number of different items or papers.
- When adding a title to your workflow(s), we recommend you include the following information to ensure items/papers can be more easily tracked while using our Project Management feature:
 - Subject and qualification (if your workflow follows different steps for each subject/qualification)
 - Month and Year of use
 - Item banking or Whole Paper Authoring
 - Item or paper workflow

Using the above, here is an example of what the title of your workflow should look like: **June 2021 English GCSE (WPA items)**