

Map an operational workflow before automating it

Use a clear process map to define responsibilities, data, exceptions and access before a software integration.

Name the start and finish

Choose one process. Describe its trigger and the completed outcome. For example, an enquiry arrives and reaches an appropriate owner with enough information to respond. Keep the initial scope narrow enough to understand.

Record the handoffs

List each step, the person responsible and the information needed. Identify where data is copied between systems or waits for approval. Record which system owns each field and how changes are communicated.

Include the exceptions

Describe incomplete information, duplicate records, unavailable integrations and failed notifications. Decide who sees the problem and how the process recovers. A useful system supports these cases as deliberately as the normal path.

Define access and retention

Identify who may view, update, export and archive each record. Confirm retention requirements with the appropriate business and legal owners. Restrict access according to actual responsibilities.

Test with an observable scenario

Write an example input and the expected outcome for each important path. Include failure and recovery cases. Use those scenarios to validate the integration and the operational handover.

Your next step

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