

Getting Started with Resultmaker Process Designer

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1 Welcome

Welcome and thank you for choosing the Resultmaker Process Platform. Resultmaker is the premier Business Process Management software platform that enables you to build easy-to-use applications for the automation of your critical business processes. Whether you're a process owner, a process consultant, or a system developer, you will get basic insights about Resultmaker's essential features in this guide.

2 What this guide will teach you

This Getting Started Guide will teach you the basics of working with the Resultmaker Process Designer – everything you need to begin creating workflows and streamlining them with proper Quality Assurance via prototyping. You will be guided through the following topics:

- Installing Resultmaker Process Designer on your PC
- Learning the basics
- Creating a new workflow from scratch
- An overview of architecture and its other features

3 Installation

Follow the steps in the table below to install the Resultmaker Process on your PC. This table shows the components necessary to run the application, as well as the prerequisites of each step. Click the links in sequence to begin your Resultmaker experience.

ST EP	WHAT	WHY	PRE- REQ UISI TE STEP	XP 1	VIST A ²	WINDO WS 7	WINDOW S 8	SIGN ³	LINK (CLICK TO INITIATE THE STEP)
1	MS Win- dows	Base operating system. <i>Note</i> : Resultmaker Process Designer 6.0 runs on Windows XP, Vista and Windows 7							[Must be installed on your PC]
2	.Net1.1	Must be on your PC to run Resultmaker Process Designer – also if you have a later version of .NET		X	Х				http://www.microsoft.com/d ownloads/details.aspx?familyi d=262D25E3-F589-4842- 8157- 034D1E7CF3A3&displaylang= en
3	.NET 1.1 SP1	Must be on your PC to run Resultmaker Process Designer– also if you have a later version of .NET	2	х	Х				http://www.microsoft.com/d ownloads/details.aspx?Family Id=A8F5654F-088E-40B2- BBDB- A83353618B38&displaylang= en
4	.NET 2	Must be on your PC to run Resultmaker Process Designer – except if you have .NET 3 or later ⁴		Х					http://www.microsoft.com/d ownloads/details.aspx?familyi d=0856eacb-4362-4b0d- 8edd- aab15c5e04f5&displaylang=e <u>n</u>
5	.NET 2 SP1	Must be on your PC to run Resultmaker Process Designer– except if you have .NET 3 or later	4	Х					http://www.microsoft.com/d ownloads/details.aspx?Family ID=0c1b0a88-59e2-4eba- a70e- 4cd851c5fcc4&DisplayLang=e <u>n</u>
6	.NET 3.5	Must be on your PC to run Resultmaker Process Designer		х	Х	х	х		http://www.microsoft.com/d ownloads/details.aspx?familyi d=333325FD-AE52-4E35- B531-

¹ Perform these steps, if you have XP on the PC

² Perform these steps, if you have Vista on the PC or XP with .Net3 or .Net3.5

³ Perform these steps, if you want to try out solutions with the Danish digital signature

⁴ Vista comes with .Net3.

									508D977D32A6&displaylang= en
7	.NET 3.5 SP1	Must be on your PC to run Resultmaker Process Designer	6	X	X	х	Х		http://www.microsoft.com/d ownloads/details.aspx?familyi d=AB99342F-5D1A-413D- 8319- 81DA479AB0D7&displaylang= en
8	Result maker Process Designer	Simple and powerful workflow designer. With Resultmaker, you manage the processing of forms with multi-party users/roles. You also oversee when to invite the users into roles, as well as the signing step details (multi-party transaction design). The Resultmaker Process Designer can be evaluated by opening content e.g. from http://demo60.resul tmaker.com/RMFro ntend/	3, 5	×	X				Process Designer 6.0.xxxx.zip
9	Pointer to the Result maker server	Points Resultmaker to a demo server. <i>demo60.resultmake</i> <i>r.com.</i> Check availability via the links. A proxy server may disrupt the connection between the Process Designer and the server	4	x	X				http://demo60.resultmaker.c om/RMFrontend/
10	Java VM	Must be on the end users' PCs in order to run a digital signature applet		Х	Х	х	х		http://www.java.com
11	OCES certificate	Must be on the end users' PCs in order to execute a Danish digital signature.	8					X	http://privat.tdc.dk/digital/

4 Content Elements

Resultmaker makes use of two content elements for execution on the Resultmaker Server:

- 1. Workflows. These are workflows that consist of forms, signing steps, business rules and ways to tie multiple users together in the workflow, giving them different rights for each step depending on their roles. The workflow content model is based on Resultmaker Process Matrix, a unique workflow model suited for large and complex business workflows.
- 2. Workflow Content script references and interfaces (such as Forms). Forms are attached to the workflow steps. Even if you don't attach a form to a workflow activity (and the activity is therefore undefined regarding its content), the Process Designer will still allow you to test the workflow by attaching a default form to the step.
- 3. Workflow Content- Rule engine. With Resultmaker, you can have rule engines execute separate steps in the business workflow. The outcome of the steps will define the following business workflows, involvement of roles, and so on. For example, the outcome of the individual step can be defined by a rule engine, which again defines the following workflow.



Figure 1: A Process Consultant's view of the two content elements of a process: The workflow is on the left side, while one of the forms is on the right

User: ACROPOLIS/Jp	sive technology
<< Back to My Reports	
These are the steps to complete: Apply Velcome Application Process	Demo Funding Application You are here: Application Amount 120000 Wealth * Urgency *
🗸 Resultmaker .:. Innovative Pe	pple .:. Decisive Technology

Figure 2: An end-user's browser view of the same workflow content in Figure 1, showing the run-time view. The selected form is shown on the right side of the screen (the "work area" of the application). The workflow menu is shown on the left side.

4 An Overview of Resultmaker Architecture

This package contains the Resultmaker Process Designer, a powerful yet easy-to-use process designer tool. In the context of the general architecture of Resultmaker, the Process Designer is represented by the red box below:



Figure 3: Process Designer in the general architecture of Resultmaker

The Resultmaker Process Designer is installed on your local PC. Evaluate the application on Resultmaker's free demo servers (e.g. <u>http://demo60.resultmaker.com</u>).

Resultmaker designs content in XML format, which may be stored locally on the file system accessible from the PC or on the server via the content import web service (this is the default option). The content runs on the Resultmaker server; it cannot be executed locally without installing Resultmaker.

5 Getting started – Opening and Modifying an Existing Workflow

Follow these procedures to get started with Resultmaker.

ATTENTION: The demo service runs on a server that is publicly available, so your content is visible to others and may be modified by others.

Therefore the project "Funding Application" may be already modified, although Resultmaker from time to time resets it as it is described below.

The Resultmaker Process Designer is pre-configured to connect to demo60.resultmaker.com; this may be updated without prior notice. Make sure that your contact in Resultmaker briefs you on which demo server to use.

5.1 Opening an Existing Workflow from the Demo Server

Step Action

1 To open Resultmaker, click **Start > All Programs > Resultmaker Process Platform 6 > Process Designer** The Resultmaker Process Designer loads.



Figure 4: Starting Resultmaker Process Designer

2 Click File > Open > Workflow Designer Project. The Open dialog box appears.

	Pro	ocess Designer 6.0							
	File	Edit View Too	ls Window	Help	_				
		New		•	esign	er 6\Default Sty	les.css		
Í		Open		•		Form		Ctrl+Shift+O	
l	H	Save	Ctrl+S			Workflow	_	Ctrl+O	
I		Save As	Ctrl+Shift+S				3		
I		Export		•					
l		Recent Forms		×	-				
l		Recent Workflows		•					
		Exit							

Figure 5: Opening a Workflow Designer Project

3 Specify the server to work from:

Type **PPGuest** in the **Username** box, **PPpassword123** in the **Password** box and **demo60** in the **Domain** box.

The free demo service may change from time to time. The default is "demo60.resultmaker.com".

- 4 Click the Find button. A list of workflows appears.
- 5 Click the workflow with the ID "FundingApplication".

Select one or more workflows			×
Workflow Information	ID	Text	Description
Show workflows containing	DBISData DeleteMe1	deleteme DeleteMe1	E
Server: demo60.resultmaker.com Use Current Windows User Use Legacy 5x Security Usemame: PPGuest Password: 	DemoFundingApplication DIBSData DL-Laura_og_David domicileCertificate Drkkevand Dt_101010 DT_P_020105 DT_P_02110_P DT_P_02110_P DT_P_165410 DT_P_281001 DT_P_324082 DT_P_324660 DT_P_324660_PT DT_P_330055 DT_P_330053 DT_P_330053_1 DT_P_330071 DT_P_330071 DT_P_331012 ✓	Demo Funding Application DIBS Payment Workflow Cross Organizational Case Bopælsattest Drikkevand TA Anmälan om medgivande New Workflow Ansökan, parkeringstillstå Ansökan, färdtjänst Ansökan, bostadsanpass Ansökan, bostadsanpass Ansökan om tillstånd till ha Intyg, cistem tas ur bruk Intyg, cistem tas ur bruk Ansökan Sygglov enligt N Ansökan - enklare ärende DT_P_330063_1 Anmälan/Ansökan kvalite Ansökan om förhandsbes	
Open	from file	Select	Cancel

Figure 6: Selecting a Project

6 Click the Select button.

The workflow "FundingApplication" loads, and the Workflow Designer window and the Properties window open.

5.2 Renaming a workflow

Step Action

1 In the Workflow Designer window, click the workflow name "Funding Application". The properties of the workflow root level appear in the Properties window.

File	Edit	View	Tools	Window	Help
2	:\Progr	P	roperties	F4	rocess
		Т	ask List	F9	
		Т	oolbox	F10	
		P	review	F5	

TIP: If at any time the Properties window disappears (e.g. if accidentally closed), recall it by pressing F4 or clicking View > Properties.

2 Rename the workflow:

In the Properties window (shown in Figure 8 by the red oval), click in the Id property and enter a new name. Do the same for the Text property.

👋 DemoApplyForMoney - demo.resultmaker.com		Properties
Apply For Money	CFO Case &	E 2↓
1		🖻 Basic Data
1.1		Description
S 1.1.1 Welcome		Text Apply For Money
	=	E Misc
I.I.2 Enter invitation details for Lase worker		DefaultPurposes
2 Transaction 1		Hidden False
2.1 Apply		
S 2.1.1 Application		
2.1.2 Send invitation to Case worker		
3 Transaction 2		
3.1 Process		
S 3.1.1 Approval 1		
📎 3.1.2 Approval 2	P	
S.1.3 Express payment		
S.1.4 Normal payment		
S.1.5 Rejection		
🃎 3.1.6 Archive		
)' Add Transaction		Description

Figure 7: The Properties Window

The **Text** field contains the name that is shown in the title bar. Modify the field in the Property window to show a change in all windows.

Edit View Tools Window Help				
esultmaker\OCM5 3.2\Default Styles.css	×			
date				
			Presenties	
A As			Propercies	
Money (My version)	CFU	Case 🕹		
1		Hontor	E Rasio Data	
11			Description	
			ld	MyVersionOfDemoApplyForMoney
No. 1.1.1 Welcome	E		Text F Mice	Apply For Money (My version)
1.1.2 Enter invitation details for Case worker	3	2	Culture	Danish
J 🖉			DefaultPurposes	
2 Transaction 1			Hidden	False
2.1 Apply				
S 211 Application	=3	2		
	E.			
21.2 Send invitation to Case worker				
3 Transaction 2				
3.1 Process				
<u> </u>		=>		
3.1.1 Approval 1		1		
S.1.2 Approval 2		2		
313Everage pairment		2		
S 1.3 Express payment				
S.1.4 Normal payment		2		
S.1.5 Rejection				
3.1.6 Archive				
/			Text	
Add Transaction				

Figure 8: Renaming the Project

3 Save your change by clicking **File > Save** or by pressing Ctrl+S.

-end-

Now the workflow can be modified without tampering with the original. However, the forms are referenced from the server, so any modification made to a form will still have effect on the original, unless the form is also saved under a separate name.

Below is the procedure for changing a form to another name and then attaching the changed form.

5.3 Renaming a Form

Step Action

1 In the Workflow Designer window, click the label of the form that you want to rename.

2 Click **Edit > Open Form** or press F7. *The Form Editor window appears.*

DemoApplicationForMoney - box1.resultmaker.com	3 Pr		
Application For Money	Г		*
		2	
	Ξ		
		Description	
		Internal ID	DemoApplicationForMoney
	L	Text	Application For Money
	Ξ	Misc	
		BrokerRule	<broker rule=""></broker>
		Form data target namespace	tmp
		Form ID	414813
		Help ID	
		Show Start Page	True
	Ξ	Version Data	
		Minimum Backend Version	4.7.4
		Minimum Front-end Version	2.11
	Ť	ext he title of the Questionnaire.	

Figure 9: The Form Editor Window

3 Rename the form:

In the Properties window (shown by the red oval in Figure 10), click in the Id property and enter a new name. Do the same for the Text property.

4 While the form window is active (the middle window in Figure 11), click **File > Save** or press Ctrl+S. *The form is saved to a different name and also attached to the changed workflow.*

2 Online Consultant Management Suite 3.2 (Release Candidate)			
Edit View Tools Window Help			
New esultmaker\OCMS 3.2\Default Styles.css	~		
Open •			
Update mot polyEorMoney - demo resultmaker.com	MyVersionOfDemoApplicationForMoney - demo.resultmaker.co 🔀	Properties	
Save Ctrl+S	Application For Money (my version)		~
Save As.: Diney (My version) CFO Case 🕹	🖻 🎦 Page 1	2m 01 m	
Fyit	Application for money	E Basic Data	
	- ab Amount	Description	
1.1	weam Birth	Id	MyVersionOfDemoApplicationForMoney
S 111Welcome	- Con Poor	Text	Application For Money (my version)
	E G Urgency	Misc	
1.1.2 Enter invitation details for Case worker		ExitLink	
		FormData LargetNamespace	(mp 414012
2 Transaction 1 LAddJ		HelpD	414013
21 Apply Add		Version Data	
		MinimumBackendVersion	4.7.4
2.1.1 Application		MinimumFrontendVersion	2.11
2.1.2 Send invitation to Case worker			
×			
3 Transaction 2			
3.1 Process			
►			
📎 3.1.1 Approval 1 🛃			
S 312 Approval 2			
📎 3.1.3 Express payment 📝			
🔊 21 d Normal number			
S 3.1.5 Rejection			
📎 3.1.6 Archive 🛃 🚽			
		The title of the Questionnaire	
Add Transaction		The date of the space for there.	

Figure 10: Renaming the form

-end-

However, it is still the old form with the original name that is attached to the changed workflow. To attach the form with the new name, first detach the form with the old name by following the steps in (section 5.4) below, and then attach the form with the new name by following the steps in (section 5.5).

The following procedures detail how to change the form attached to a step.

5.4 Detaching a Form Attached to a Step

Step Action

Right-click the particular step that requires the new form, and then click Detach Form.

-end-

5.5 Attaching a Form to a Step in a Process

Step	Action
1	Click on the paper-clip icon on the left of the step. The Selection dialog box appears.
2	Specify the server to work from: Type demo in the Username and Password boxes.
3	Click the Find button. A list of forms appears.
4	Click the name of the new form that is to be attached to the step.
5	Click the Select button. The new form is now attached to the step.

-end-

6 Creating a New Process and Prototyping

In this chapter you will learn how to create your first workflow and take a look at Resultmaker's handy Preview feature.

6.1 Prototype the content at any time (Preview – F5)

You can preview the content on the server through a browser at any time by pressing F5 or clicking **Tools > Preview**. This can be done both from the workflow (when the Workflow Designer window is active) and from the form, in which case the form will be shown alone in a one-step workflow containing just itself.

You will always assume the first role, initially named "Owner" or "Role1". For workflows with more than one role, Resultmaker auto-generates an invitation mechanism, whereby you can specify which users are to play the other roles. Simply specify the email address of each role, and a mail will be sent to the other participants. Initially, we recommend that you specify your own e-mail address and thereby invite yourself into all roles, so that you can see how this method works.

	ker
User: DEMO60\Administrator	
<< Back to My Reports	
These are the steps to complete:	New Workflow
1. New Transaction	You are here: Enter Invitee Details
1.1 New Group	This project requires participant 'Role1' to be invited. Here you will provide information about yourself and about the person or company you are inviting, so electronic contact can be established. Information about you
Vew Form Activity	Name/Company E-mail
Enter Invitee Details	*
	Information about participant 'Role1' Name E-mail Security To ensure that your invitation is not abused, you must provide a password that the invitee will use to accept the invitation. Password To Remember to contact the invitee and give him or her this password.
✓ Resultmaker .:. Innovative People .:.	<< Back Continue >> Decisive Technology

Figure 11: Entering the invitation details for a Role

The link in the email will require the recipient to log in to get access to the workflow instance. After creating an account by clicking on the link, the new user will be asked to enter a workflow-specific password provided by the workflow owner (in this instance, you). The workflow-specific password is specified at the same time that the email address is specified. You may leave the password blank, but be sure that the other users are informed if you

specify another password. This protects against unauthorized access by people who accidentally receive the email invitation.

Dear User

Owner has inititated the report 'My New Workflow' and hereby invites you to review and approve your part of the electronic report.

Click on the link below to open the report. You will then be guided through the part of the report that requires your approval.

Owner has entered a password that you will need in order to access your part of the report. If you are not already registered as a user, you must start by registering a user name. You will then be asked for the password. If Owner has not yet given you the password, you can contact him or her at <u>owner@resultmaker.com</u>.

The registration is not valid without your approval.

My New Workflow

Click on the link above. When the report has been completed, the approved information will be sent to the intended receiver. Owner will also automatically be informed that you have completed your part of the report.

The link to the report will be active for 14 days. Save this e-mail so you can access the report via the link shown above.

If you do not want to approve the report digitally, contact Owner and ask him or her to send you a printed copy of the report by mail. You can contact Owner at <u>owner@resultmaker.com</u>.

Figure 12: An example of the email sent to the user with roles in the workflow.

This e-mail message and any attachments are confidential and may be privileged or otherwise protected by legal rules and for use by the addressee only. If the message is received by anyone other than the addressee, we kindly ask you to notify thesender by reply e-mail immediately and delete it and any attachments from your computer without copying it or disclosing its contents to anyone. Whilst all reasonable care has been taken to avoid the transmission of viruses, no responsibility isaccepted in this regard and the recipient should scan and carry out such other checks as it considers appropriate.

6.2 Creating a New Workflow

To create a new workflow and a set of forms are required. You may design the workflow part without specifying forms; in that case, the Process Designer allocates a default form to all unspecified steps.

	Click F	ile > New > Workflow Designer Project		
	A new	Workflow Designer window appears.		
	Pr Pr	ocess Designer 6.0		
	Eile	<u>E</u> dit <u>V</u> iew <u>T</u> ools <u>W</u> indow <u>H</u> elp		
		New	•	Form Ctrl+Shift+N
		<u>O</u> pen	•	Workflow Designer Project Ctrl+N
	H	Save Ctrl+S		Advanced Workflow Project Ctrl+M
	E.	Save <u>A</u> s Ctrl+Shift+S		
		Recent Forms		
		Recent Workflow Designer Projects		
		Recent Advanced Workflow Designer Projects	•	
		Exit	-1	
			-1	

2

Name your workflow: In the Workflow Designer window, click the workflow name "NewWorkflow". The properties of the workflow level appear in the Properties window.

3 In the Properties window, click in the Id property and enter a new name.

NOTE: The name must begin with a letter [a-z][A-Z] and may be followed by any number of letters, digits [0-9], hyphens "-", underscores "_" colons ":", and periods "." as long as [:-] is never used.

4 Save your workflow by clicking **File > Save** or pressing Ctrl+S. *The Save Workflow dialog box appears.*

C:\Program Files (x86)\Resultmaker\Process Desig	gner 6\Default Styles.css		-		
NewWorkflow			Properties	X	3
New Workflow	Role1		₽2 ↓ ©		
1 New Group		E	Basic Data		-
1.1.1 New Form Activity			Description Internal ID	Transaction	
<u> </u>			Text	New Transaction	
			Extensibility		
			Scripte		
Save Workflow	×		Form data		
			AutoGenerateOioXml	True	
Choose to save project on a file or ser	rver.		GenerateSingleSchema	False	Ξ
NewWorkflow			Oio Xml Export Name	OC Q 320871 Xslt	
			Misc		
() File			FormId	320871	
 Server 			Namespace	tmp	
			NameSpaceUri	http://rep.oio.dk/virk.dk/tmp/schemas/2	
Server Name			Predecessors		
demo60.resultmaker.com	•		PurposeRule		
			Receipt Email		
Use Current Windows User			ReceiptMailBody	The data submitted is attached.	
Use Legacy 5 x Security			Receipt Mail Subject	Process Engine Transaction	Ŧ
User Name			Description		
		T	he description of the current Wo	rkflow Item.	
dd Iransactior					
Domain					

Figure 14: The Save Workflow dialog box

- 5 In the Workflow Designer window, click the label of the workflow group (labeled "1.1 New Group"). *An Add button appears.*
- 6 Click the Add button. *A list box appears.*
- 7 To add an activity, click one of options in the list.

In this case, select an option that does not attach a form.

8 Rename activities and workflow groups:

In the Workflow Designer window, click the label of the activity or workflow group. Then, in the Properties window, click in the Id property and enter a new name.

AvNewWorkflow - demo.resultmaker.com *		Properties	×
My New Workflow	Owner 🕹		<u>~</u>
1 New Transaction	(Add)	🗆 Basic Data	
1.1 New Group	Add	Description	
		Id Tout	QuestionnaireActivity I
1.1.1 New Questionnaire Activity			
1.1.2 Second step		AttemptAutoClose	False 15
		InterviewId	
		Predecessors	
		PurposeRule	
		ScriptId	
J		Text	
Add Transaction			

Figure 15: Renaming an activity

Resultmaker requires the "Id" properties to be unique (within their scope). The "Text" properties need not be unique.

9 Rename roles:

In the Workflow Designer window, click the Role tab (on the top-right part, currently named "Owner"). Then, in the Properties window, click in the Id property and enter a new name. Do the same for the Text property.

A MyNewWorkflow - demo.resultmaker.com *		Properties		
				~
My New Worktiow	Myself 6	<u>₿</u> 2↓ 📼		
1 New Transaction	(Add.)	🗆 Basic Data		
1.1 New Group	Add	Description	Ohun er	
1.1.1 New Questionnaire Activity		Text	Myself	
1.1.2 Second step				
		ld		
Add Transaction				

Figure 16: Renaming a role

10 Add a role:

Click the Add Role icon, which is the person-shaped icon located upper-right corner of the Workflow Designer window. Then, in the Properties window, click in the Id property and enter a new name.

😽 MyNewWorkflow - demo.resultmaker.com *		Properties	×
My New Workflow	Myself Role		<u> </u>
1 New Transaction	(Add)	🗆 Basic Data	
1.1 New Group	Add	Description	Pala
1.1.1 New Questionnaire Activity		Text	Role
112 Second step			
		ld	
Add Transaction			

Figure 17: Adding a new role

11 Assign rights to the roles:

Click inside the invisible grid that spans the activities and roles (shown by the mouse pointer in Figure 19). *An icon will appear.*

NyNewWorkflow - demo.resultmaker.com *		Properties	X
My New Workflow	Myself Role 🕹		~
1 New Transaction	(Add)	Basic Data	
1.1 New Group	Add	Description	
		Id	QuestionnaireActivity
1.1.1 New Questionnaire Activity		l ext	New Questionnaire Activity
110C			Eslas
1.1.2 Second step		InterviewId	raise
<u>P</u>		Predecessors	
		PurposeRule	
		ScriptId	
		Id	
J			
Add Transaction			

Figure 18: Assigning rights to a role

Clicking on the icon will cycle through the various rights possible for each role. They are shown in the table below:

(No Read access. The user having that role can see the step in the workflow menu, can select it and icon) see the work area as read only fields, but the user can not act in it.

Write / execute access. The user having that role can execute the step (see and select it in the menu), and for forms, fill out the fields of the form referenced by the activity and submit the field values.

12 Insert invitation step:

4

Click the Role tab and drag the pointer to the area between two steps. *Two new steps numbered 1.1.2 and 1.1.3 are inserted.*

🔆 MyNewWorkflow - demo.resultmaker.com *		Properties	X
My New Workflow	Role 💩		~
1 New Transaction 1.1 New Group Image: Solution of the second step Interview Interview <t< th=""><th></th><th>Image: Second second</th><th>CommitInvitationActivity Invitation WorkflowDesigner_3_2_DefaultEmailInvitation 1.1.2 (default)</th></t<>		Image: Second	CommitInvitationActivity Invitation WorkflowDesigner_3_2_DefaultEmailInvitation 1.1.2 (default)
Add Transaction			

Figure 19: Inserting an invitation activity

13 Determine access rights by defining the invitation details: Set steps 1.1.2 and 1.1.3 to **Write/Execute Access.**

🍓 NewWorkflow *			×
New Workflow	Myself	Role2	2
1 New Transaction		(Add)	
1.1 New Group		C66AC	
🔊 1.1.1 New Form Activity	2		
1.1.2 Enter Details for Role2	2		
1.1.3 Send invitation to Role2	2		
1.1.4 New Form Activity		₫	
Add Transaction			

Figure 20: Determining access rights

The first invitation sub-activity (1.1.2) will be visible, the other one (1.1.3) is a hidden activity that carries out the sending of the invitation e-mail. This other step may be moved to a later point in the workflow (so that the definition of who takes the role "Role" happens earlier than when the actual invitation e-mail is sent out).

NOTE: Remember that you can view the run-time side of your workflow anytime by pressing F5.

: DEMO60\Administrator	
ack to My Reports	
hese are the steps to complete:	New Workflow
New Transaction	You are here: Enter Invitee Details
1.1 New Group	This project requires participant 'Role1' to be invited. Here you will provide information about yourself and about the person or company you are inviting, so electronic contact can be established. (Information about you
Vew Form Activity	Name/Company E-mail
Enter Invitee Details	Ж
	Security To ensure that your invitation is not abused, you must provide a password that the invitee will use to accept the invitation. Password
	Remember to contact the invitee and give him or her this password.

Figure 21: A run-time view of the invitation step.

14 Insert a signing step:

In the Workflow Designer window, click the label of the workflow group (named "1.1 New Group"), click the Add button, and then click **Signing Step.**

NewWorkflow *		Properties	[
New Workflow Mys	elf Role2 🕹	(m) 61 m	
New Transaction	(Add)		
1.1 New Group	C66AC	Description	
1.1.1 New Form Activity 1.1.2 Enter Details for Role2	Form Sto Form Sto Invitatio	ep Ins ep and attach form Ctrl+Ins n Steps	FormActivity1 New Form Activity
1.1.3 Send invitation to Role2	Signing	Step	
1.1.4 New Form Activity	InfoPath InfoPath Data Sul	n Step I Step and attach InfoPath Template omit Step	True DefaultQuestionnaire_Schema GenerateXstReceipt
		E Misc	
		AttemptAutoClose EnableInterviewSession Form ID	False False
		PurposeRule	

Figure 22: Inserting a signing step

New Workflow	Myself Role2 🕹		-
New Transaction	(bbA)		
1.1 New Group	Add	Basic Data	
<u></u>		Description	Cinning Antivity 1
1.1.1 New Form Activity		Text	Signing Step
1 1 2 Enter Details for Bole?			Jighing Jep
		El Custom Data	
1.1.3 Send invitation to Role2		Scripts	
114 Starling Chan		🗆 Form data	
1.1.4 Signing Step		AggregateExportName	OC_Q_327285_Agg
1.1.5 New Form Activity		AutoGenerateAggregate	True
•		AutoGenerateOioXml	True
		AutoGenerateSignData	True
		GenerateSingleSchema	False
		OioXmlExportName	OC_Q_327285_Xslt
		Receipt Export Name	OC_Q_327285_Pdf Merge
		Receipt Type to Auto Generate	GenerateXsltReceipt
		Sign Data Export Name	OC_Q_327285_Sign
		Misc	
		Data Collection Activities	1.1.1
		Form ID	
		FormId	327285
		Namespace	tmp
		NameSpaceUri	http://rep.oio.dk/virk.dk/tmp/schemas/20
		Predecessors	
		PurposeRule	
		Data Collection Activities	
Add Transaction		Supply the numbers of the activities the	nat are to be generated Sign Data, Oio Xml and
		neceipt for. The numbers have the fo	ormat 1.1.1, 1.2.1 etc. if more that one activity I

15 Drag the signing step to an appropriate place in the flow (in this case, drag to 1.1.4 as shown in Figure 24).

Figure 23: Defining a form step

16 In the DataCollectionActivities field of the Properties window, define the form steps that are to be signed (1.1.1 in this case).

A comma separated list is allowed; in this case, the signing step collects data from multiple forms into one (sub-)transaction. The signing specification is based on a lookup of the data from the form, such that the variable names behind the fields of the form become the signing specification, together with the labels of these fields. At this time there is no form specified for 1.1.1 and 1.1.5, so the operation is completed when saving the workflow after attaching a form to the both steps.

17 Determine which role has the right to do the signing.

NewWorkflow *	- • •	Properties	8
New Workflow	Myself Role2 🕹		•
1 New Transaction	(Add)	2 · 2	
1 1 New Group		Basic Data	
6		Description	Contract in the
1.1.1 New Form Activity		Text	Signing/Activity I
3 112 Enter Datails for Pole?	2	E Extensibility	Signing Step
I.I.2 Enter Details for Noie2		E Extensionity	
1.1.3 Send invitation to Role2		Societe	
		E Form data	
1.1.4 Signing Step		AccrecateExportName	OC Q 327285 App
1 1 5 New Form Activity	2	AutoGenerate Accrecate	True
0		AutoGenerateOioXml	True
		AutoGenerateSignData	True
		Generate Single Schema	False
		OioXmlExportName	OC Q 327285 Xslt
		Receipt Export Name	OC Q 327285 Pdf Merge
		Receipt Type to Auto Generate	GenerateXslt Receipt
		SignDataExportName	OC_Q_327285_Sign
		Misc	
		Data Collection Activities	1.1.1
		Form ID	
		FormId	327285
		Namespace	tmp
		NameSpaceUri	http://rep.oio.dk/virk.dk/tmp/schemas/20
		Predecessors	
		PurposeRule	
		AggregateExportName	
Add Texesseries			
Add Transaction			

Figure 24: Assigning a role to the signing step

In this case "Role" signs the data that "Myself" has supplied in the form on step 1.1.1.

- Assign forms to steps 1.1.1 and 1.1.5:Do the procedure Attaching a Form to a Step (section 5.5) for steps 1.1.1 and 1.1.5.
- 19 To see how your workflow will look like in an end-user environment, press F5.

-end-

The transaction specification for the signing step is auto-generated by looking into the form attached to 1.1.1. Transactions are committed when all signing steps within the transaction (the outmost grouping in the designer) have been completed.

7 Modeling Workflows in Design Workshops

Since Resultmaker makes it easy to prototype a workflow while it is being designed, Resultmaker is extremely well-suited for workflow modeling and design workshops. An example of an efficient workshop is described below.

One person stands by the white board drawing the Resultmaker Process Matrix (see Figure 26), and another keys the matrix into the Process Designer and shows the result on a projector.

	Activity Roles / Parties			ties		Pre-dec.	Purposes				Purpose handling	Specifikation / Questionnaire ref.
							Α	В	С	Rule		
		CEO	Case Worker	Mana- ger	A u o	t [bold = t logic , else seq	Rich	Hurry	Accept			
						uencej	50%	50%	50%			
1	Application	E								Always		
1.2	Application	E								Always	Set A, B	Application for money, determine A and B from data
1.3	Sign	E				1.2				Always		
2	Process		E			1				Always		
2.1	Approval 1		E							Always	Set C	Approval
2.2	Approval 2	Deny		E		2.1	A			And	Set C	Extra approval step if the applicant is rich
2.3	Express payment		E		X	2.1, 2.2		В	С	And		Payment step for express payments if in a hurry
2.4	Normal payment		E		X	2.1, 2.2		Not B	С	And		Payment step for normal payments if not in a hurry
2.5	Rejection letter		E		Х	2.3, 2.4			Not C	And		Send a notification if rejection, i.e. no payment
2.6	Archive		E			2.5				Always		Send a notification if rejection, i.e. no payment

Figure 25: The Process Matrix format of the workflow design (on the white board, and also may be documented in Excel to be used in documentation and approvals of the design). The right-hand column specifies the forms that constitute each step without going into detail; the forms need not be designed in order to prototype the workflow

- Start with the Activity column -- Add the roles and assign access rights ("E" for execute or write access, etc.)
- 2. After filling in the activity numbers on the left, list the predecessors for each step.
- 3. Describe in words in the last column, what happens on each step.
- 4. Add the purposes the rules that determine if the activity is active in the project.
- 5. Mark which steps affect the purposes ("Purpose handling")

DemoApplyForMoney - demo.resultmaker.com *			Properties		×
Apply For Money	CFO Case worker	Manager 💩			*
1 1.1 1.1 1.1 Welcome 2 Transaction 1	2 2		Basic Data Description Id Text Mise AttemptAutoClose InterviewId Predecessors	ExpressPayment Express payment False DemoExpressPayment 3.1.2	
2.1 Apply	-		PurposeRule ScriptId	Hurry and Accept	
2.1.1 Application 2.1.2 Send invitation to Case worker		Add			
3 Transaction 2 3.1 Process		Add			
 3.1.1 Approval 1 3.1.2 Approval 2 	₽				
3.1.3 Express payment	2				
 3.1.4 Normal payment 3.1.5 Rejection 3.1.6 Archive 	e E R				
Add Transaction			PurposeRule		

Figure 26: Purpose rules — compare the green area of Figure 26 (see row 2.3) — are edited in the Properties window of the activity highlighted. Boolean expressions are allowed ("Not", "and", "or", and parentheses)

6. Create an "Auto" column to mark steps that are candidates for "Attempt Autocomplete" (steps that will be autocompleted, if the form attached to the step already represents known data for each of its required fields).

The forms are not needed to prototype the workflow, but for the "purpose rules" to be prototyped, the forms that manage them must be created. See Figure 26.

- 7. Create forms as specified
- 8. Manage variants through purposes
 - a. The Form Editor is used to edit "purposes"
 - b. Purposes are set and removed by answers in forms
 - c. Attach purposes to steps through purpose rules

		_			
Properties		3 Pr	operties		×
	~				~
			! 2 ↓ 🖻		
🗆 Basic Data		Ξ	Basic Data		
Description			Description		
ld	true		ld		false
Text	Yes, approve		Text		No, do not approve
🗆 Look and Behaviour		Ξ	Look and Behaviour		
Description Styles			Description Styles		
Label Styles			Label Styles		
Styles			Styles		
Purposes		Ξ	Purposes		
Add	Accept		Add		
Remove			Remove	(Accept
Reset			Reset		
DemoApproval2 - m-oc-test-01 * Approval 2 Page 1 Approve, even though approve, even though Yes, approve No, do not approve	¥		emoApproval2 - rm-oc-te Page 1 Approval 2 Page 1 Approval 2 Yes, appr Yes, appr No. do no	est-01 * en though ove at approve	⊠ the applicant is rich

Figure 27: Setting purposes depending on answers.

By default a purpose is false ("removed"), until some form "adds" it (sets it to true).

8 A List of Resultmaker Windows

Below are the different Resultmaker windows that you will use for creating and editing your workflows.

1. Workflow Designer. It is the default window and opens with the Ctrl+O shortcut.

Figure 28: The Workflow Designer window

Form editor – opened separately or by pressing F7 in the Workflow Designer. You can preview the content of the form on the server through a browser at any time by pressing F5 or clicking Tools > Preview. In this case, the form will be shown alone in a one-step workflow containing just itself

Figure 29: The Form Editor

3. Form Layout window

The Form Layout window is accessed by selecting the Page level in the Form Editor and pressing F8 – or right clicking the Page level and selecting

4. Properties window – shows properties of the content element highlighted – the workflow, form, or any of their sub-elements.

2	Properties	
		•
•		
Ξ	Basic Data	
	Description	
	Internal ID	DemoArchive
	Text	Archive
Ξ	Extensibility	
Ŧ	Custom Data	
	Scripts	
Ξ	Form data	
	AutoGenerateFormXmlSchema	True
	FormXmlExportName	DemoArchive_Schema
	Generate Receipt	GenerateXsltReceipt
	ReceiptExportName	DemoArchive_XsltReceipt
Ξ	Misc	
	AttemptAutoClose	False
	EnableInterviewSession	False
	Form ID	DemoArchive
	Predecessors	2.1.4, 2.1.5, 2.1.6
	PurposeRule	
T		
	exi a display text of the Woddlow Item	
1"	ie uspiay text of the worknow item.	

Figure 30: The Properties window

5. Workflow Editor – the full content model editor; opened by pressing Ctrl+I.

DemoFundingApplication* (pptest60)		
🖬 🕆 🦆		
Demo Funding Application Roles CFO Case Worker Manager Owner Purposes Purposes Demo Purposes Project Builder. Invitation. Demo Approval 1 Demo Approval 1 Demo Approval 2 Normal Payment Demo Payment Archive	General Security Static Data Activity Internal ID Approval2 Description	Browse Edit
4		Figu

Note – do only use the Workflow Editor for workflows developed on older platforms that 6.0.

31: The Workflow Editor

9 Process Platform Component Overview

This section outlines the all components that the Resultmaker Process Platform consists of.

Figure 32: Resultmaker Process Platform component overview

Please consult Resultmaker for further information.