Getting Started with Resultmaker Process Designer

Sub title: Install and learn about the Resultmaker Process Designer. Create your first workflows and forms.
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Contents

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.

STEP	WHAT	WHY	PRE-REQUISITE STEP	XP[1]	VISTA[2]	WINDOWS 7	WINDOWS 8	SIGN[3]	LINK (CLICK TO INITIATE THE STEP)
1	MS Windows	Base operating system. *Note*: 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	X				http://www.microsoft.com/downloads/details.aspx?familyid=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	X	X				http://www.microsoft.com/downloads/details.aspx?FamilyId=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]		X					http://www.microsoft.com/downloads/details.aspx?familyid=0856eacb-4362-4b0d-8edd-aab15c5e04f5&displaylang=en
5	.NET 2 SP1	Must be on your PC to run Resultmaker Process Designer– except if you have .NET 3 or later	4	X					http://www.microsoft.com/downloads/details.aspx?FamilyID=0c1b0a88-59e2-4eba-a70e-4cd851c5fcc4&DisplayLang=en
6	.NET 3.5	Must be on your PC to run Resultmaker Process Designer		X	X	X	X		http://www.microsoft.com/downloads/details.aspx?familyid=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	X	X		http://www.microsoft.com/downloads/details.aspx?familyid=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.resultmaker.com/*RMFrontend/	3, 5	X	X				Process Designer 6.0.xxxx.zip
9	Pointer to the Result maker server	Points Resultmaker to a demo server. *demo60.resultmaker.com*. 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.com/RMFrontend/
10	Java VM	Must be on the end users' PCs in order to run a digital signature applet		X	X	X	X		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.

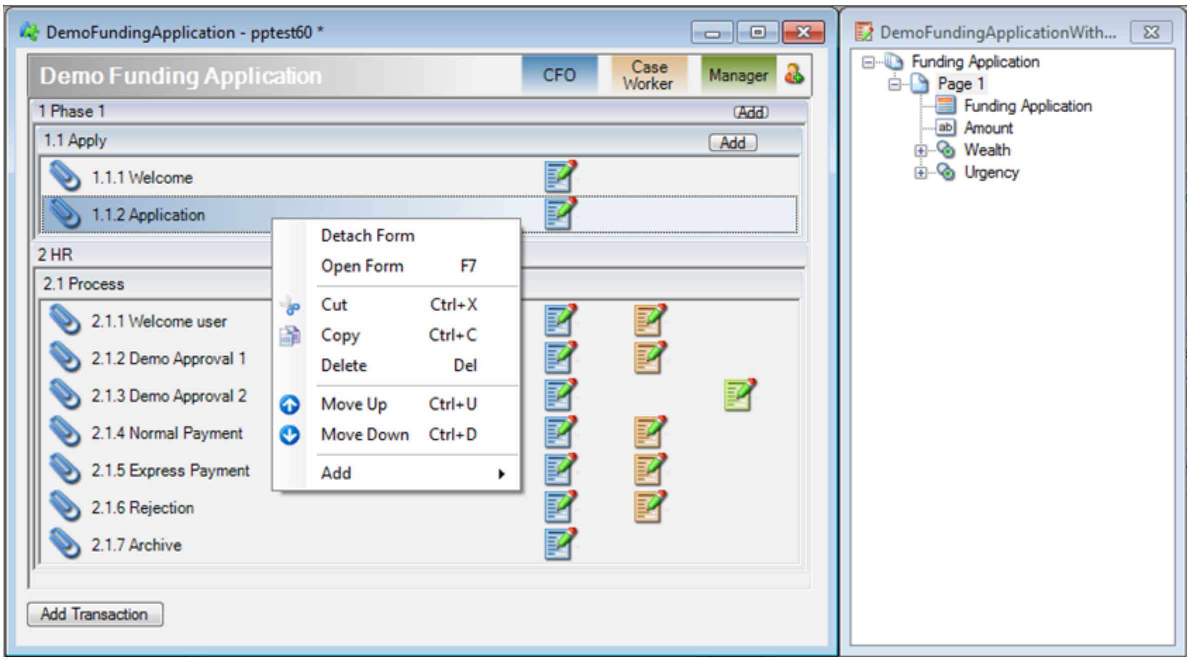


Figure 1: A Process Consultant's view of the two content elements of a process: The workflow is on the left side, while one of the forms is on the right

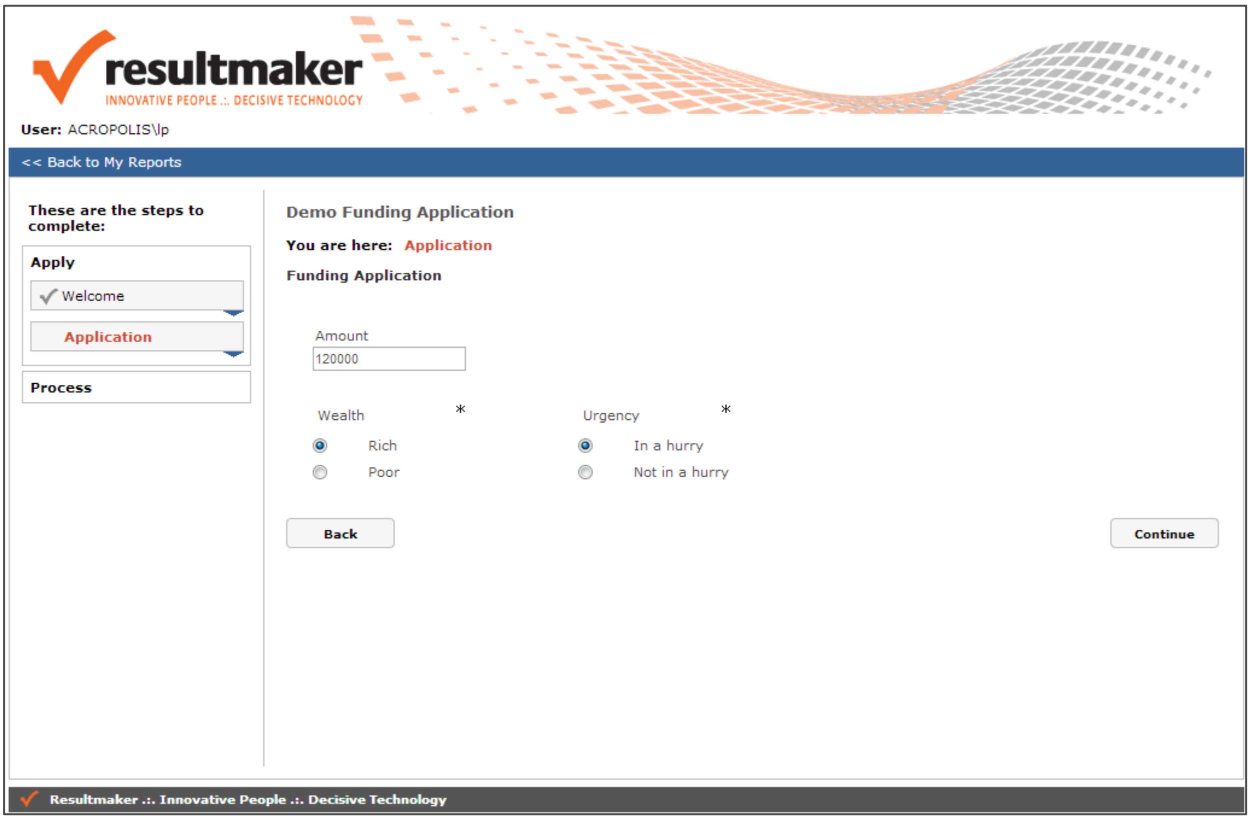


Figure 2: An end-user's browser view of the same workflow content in Figure 1, showing the run-time view. The selected form is shown on the right side of the screen (the "work area" of the application). The workflow menu is shown on the left side.

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:

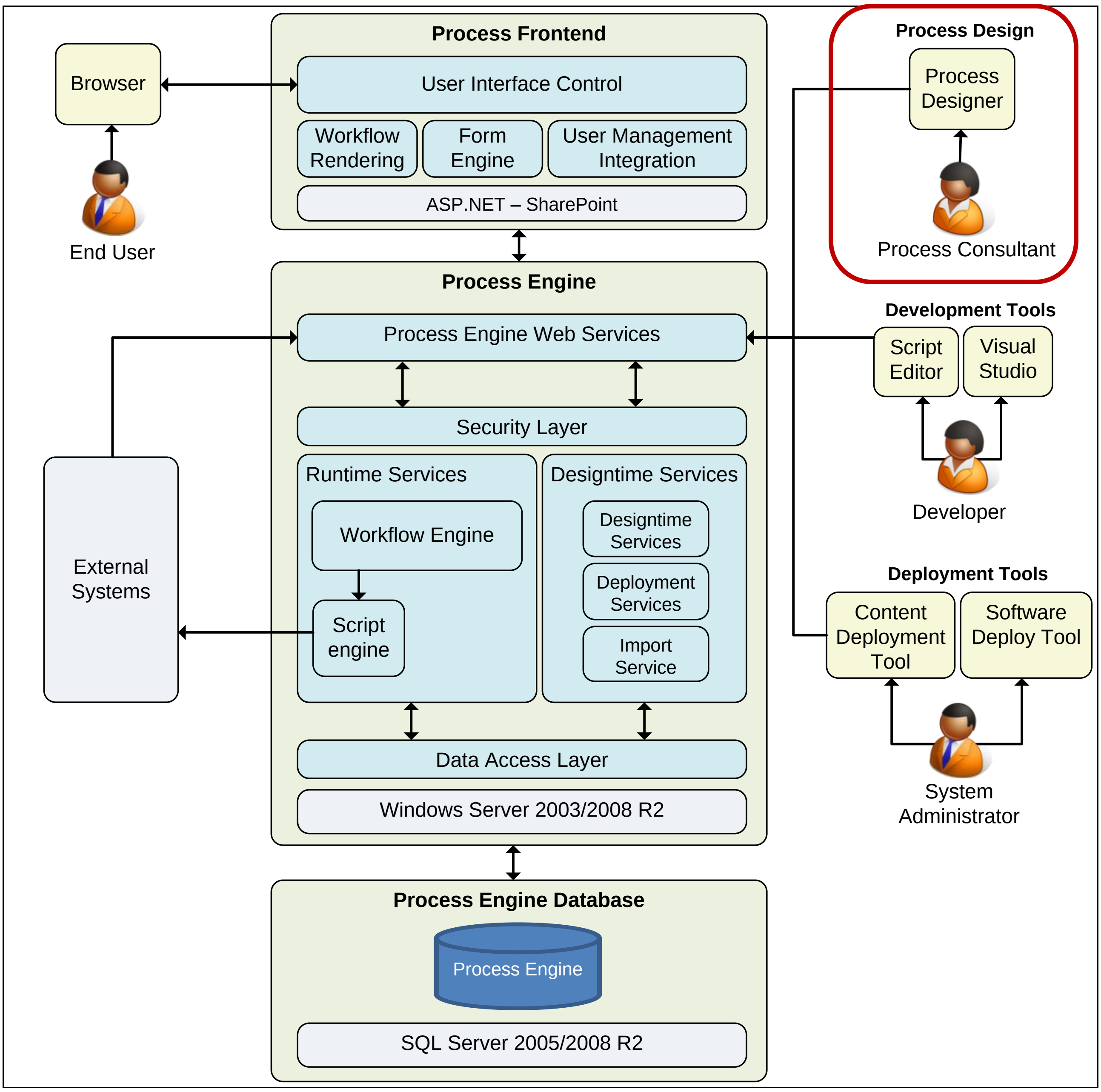


Figure 3: Process Designer in the general architecture of Resultmaker

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

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.*

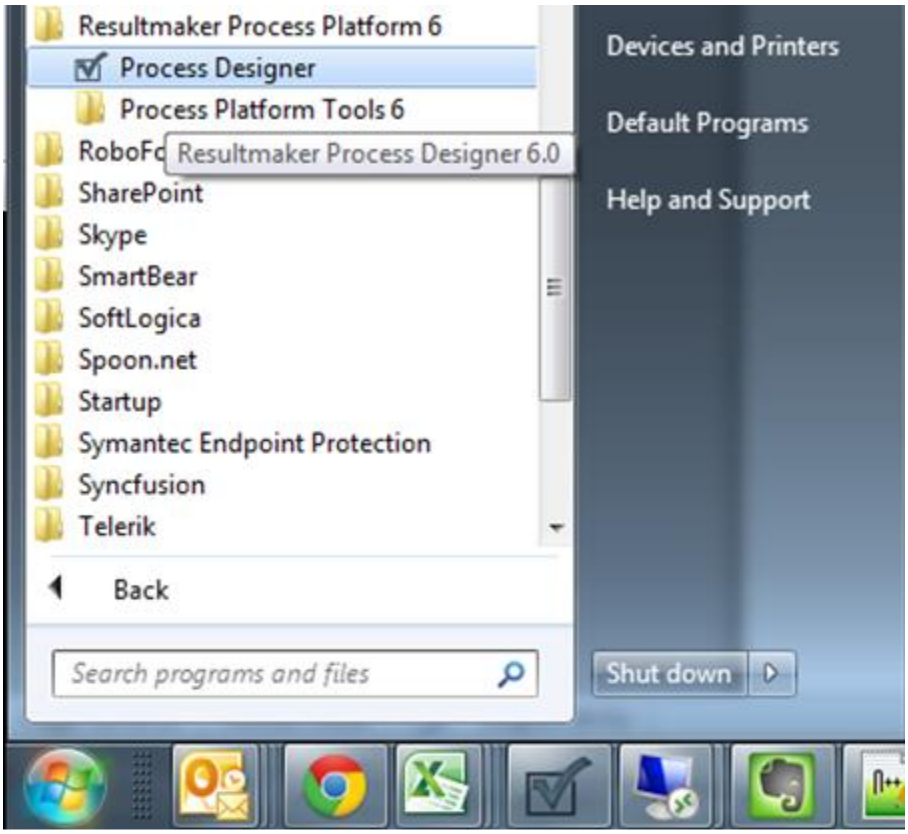


Figure 4: Starting Resultmaker Process Designer

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

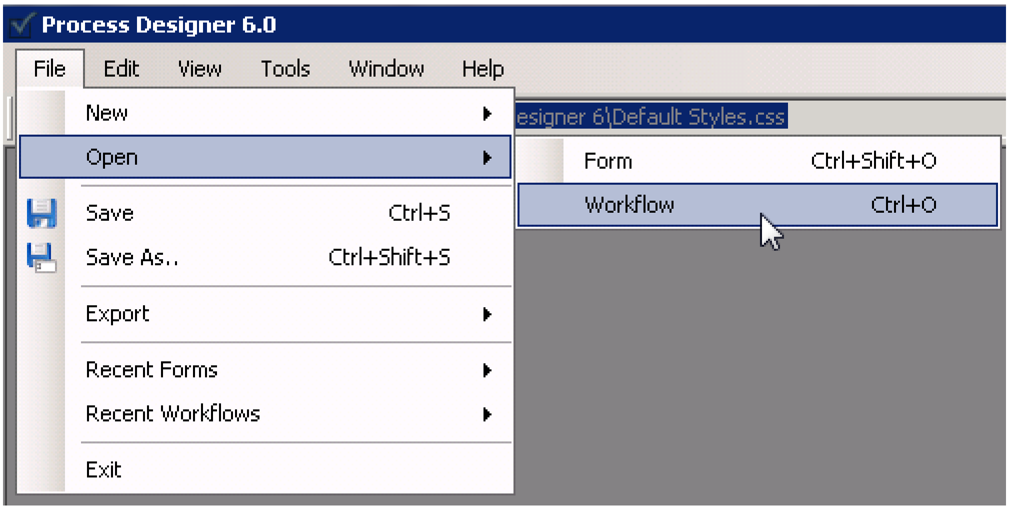


Figure 5: Opening a Workflow Designer Project

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".

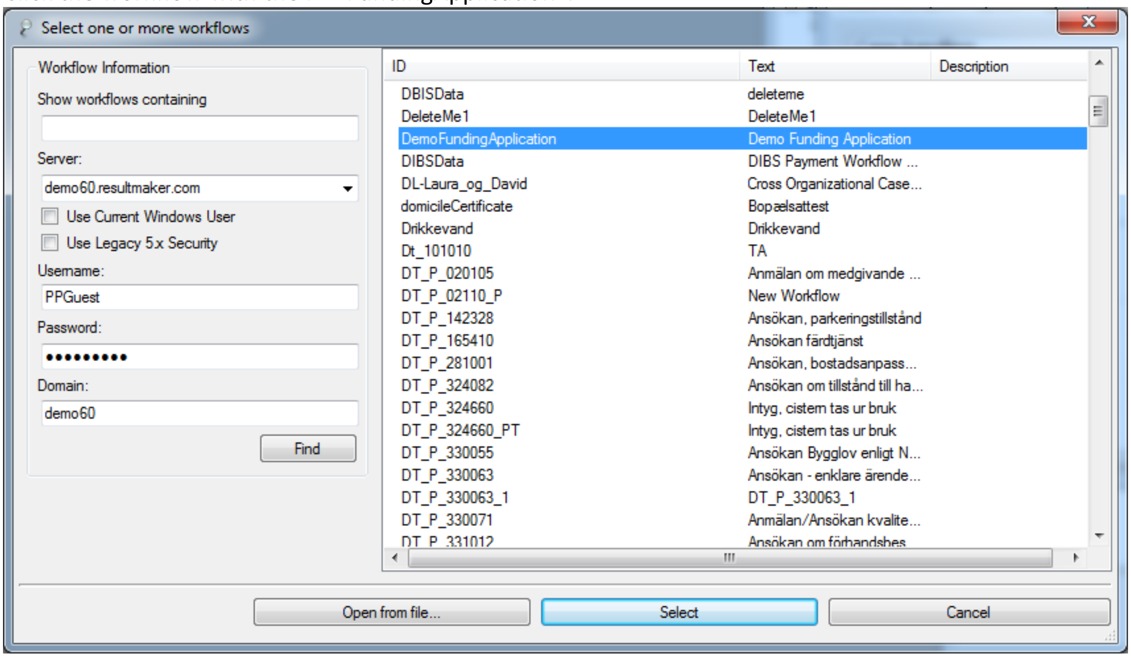


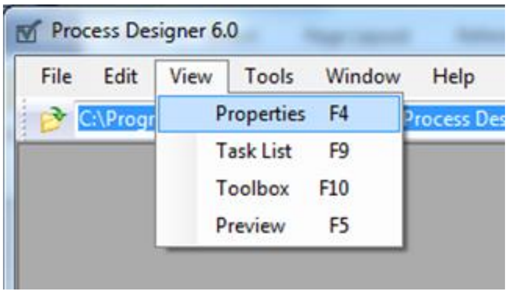
Figure 6: Selecting a Project

6 Click the Select button.
The workflow "FundingApplication" loads, and the Workflow Designer window and the Properties window open.

-end-

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.*



*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.

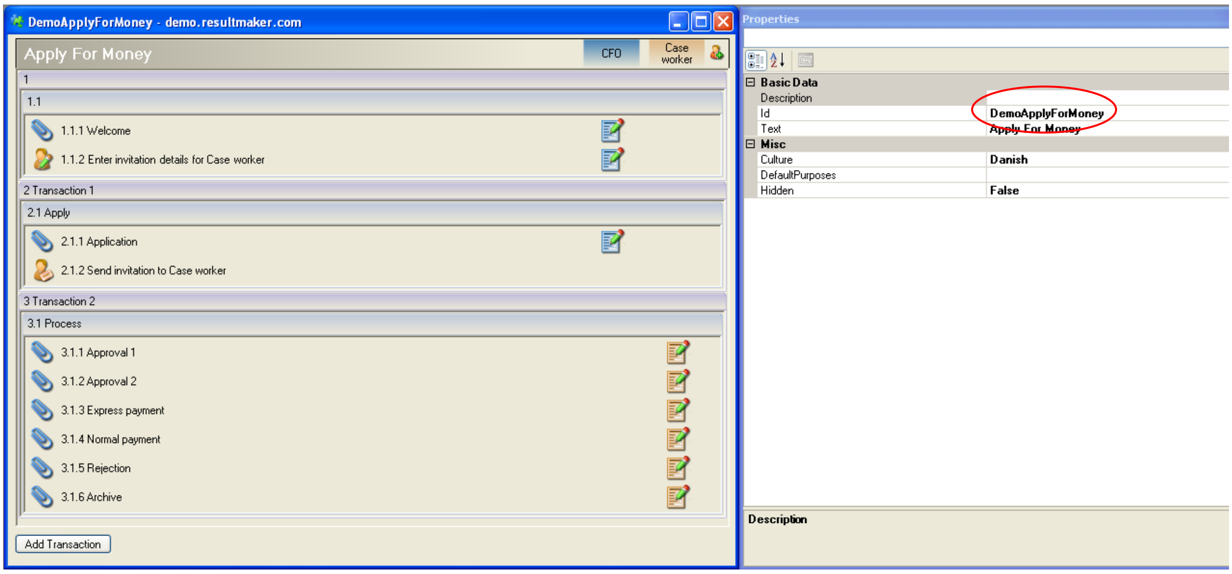


Figure 7: The Properties Window

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.

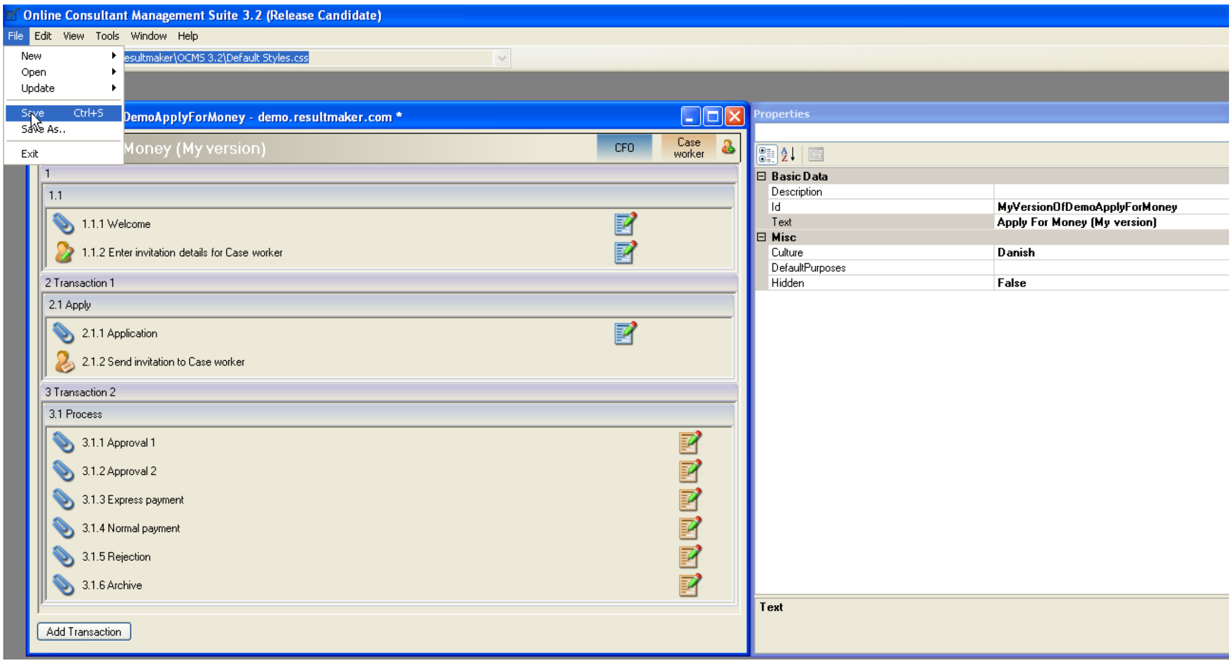


Figure 8: Renaming the Project

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.*

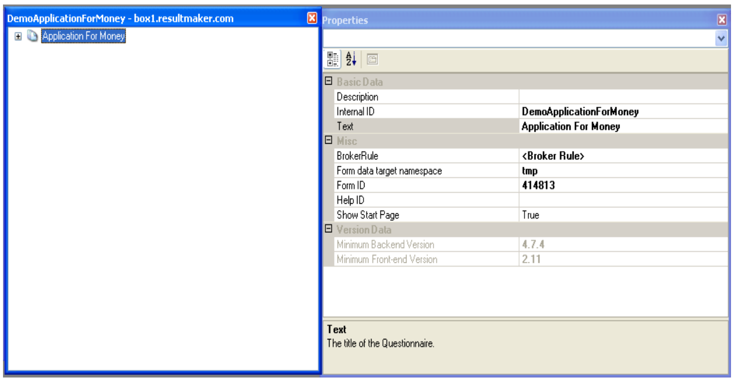


Figure 9: The Form Editor Window

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.

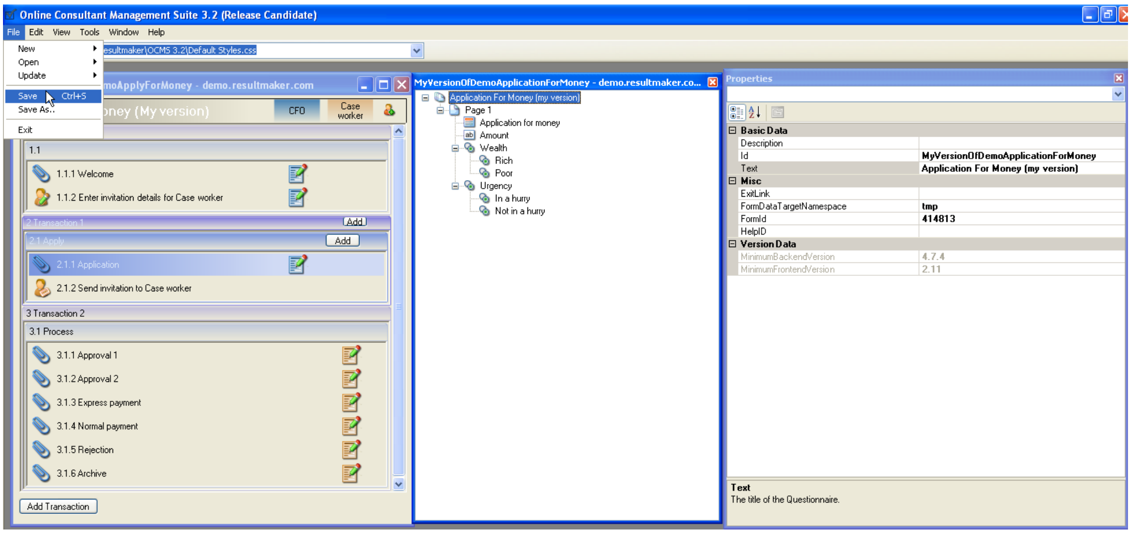


Figure 10: Renaming the form

-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.

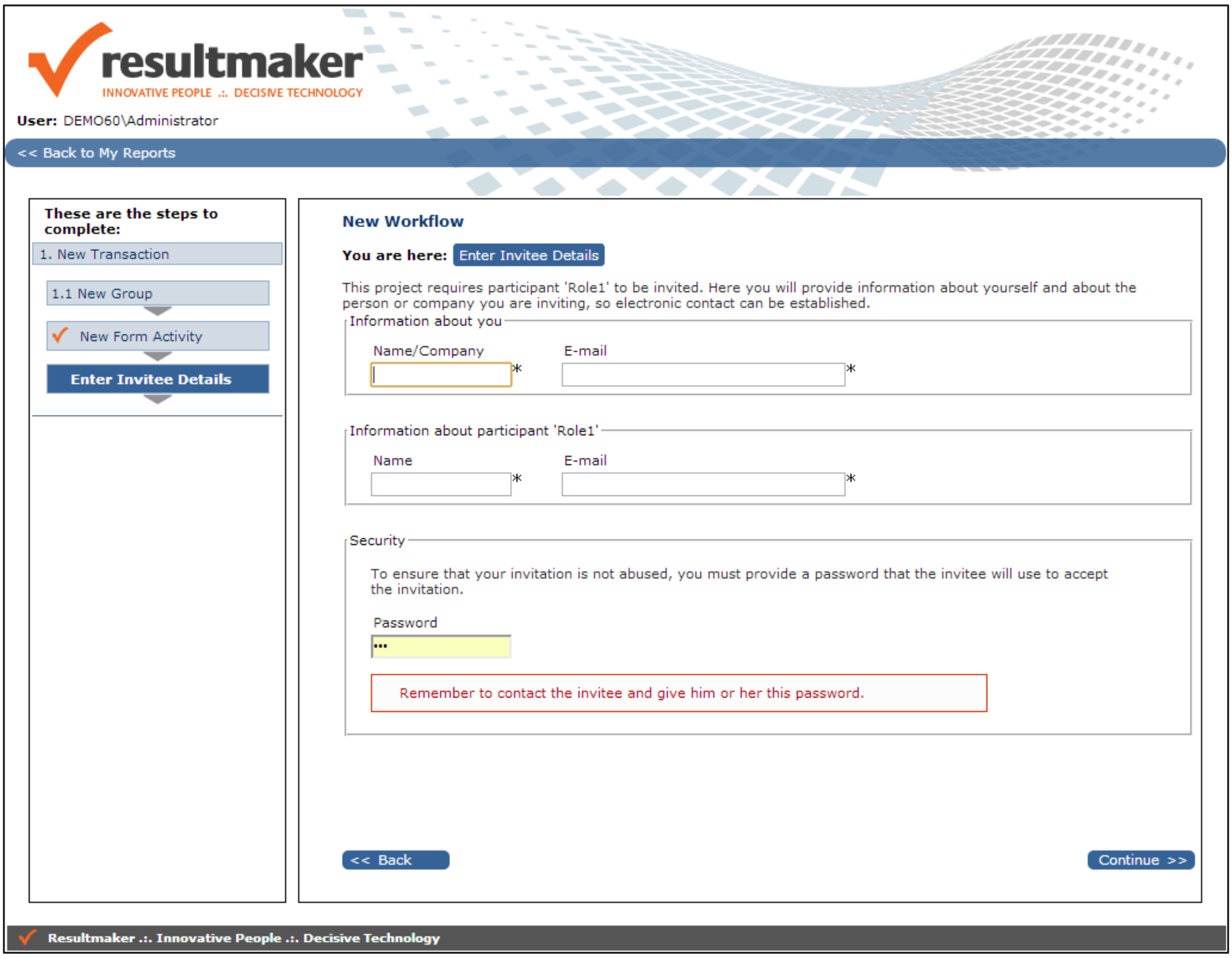


Figure 11: Entering the invitation details for a Role

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 owner@resultmaker.com.

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 owner@resultmaker.com.

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

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.

Step	Action
1	Click **File > New > Workflow Designer Project.** *A new Workflow Designer window appears.*

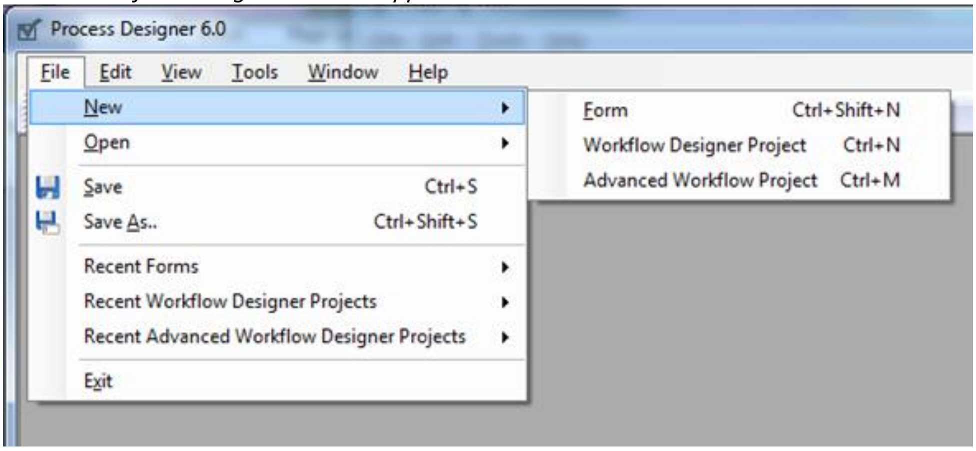


Figure 13: Creating a new workflow

Step	Action
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.

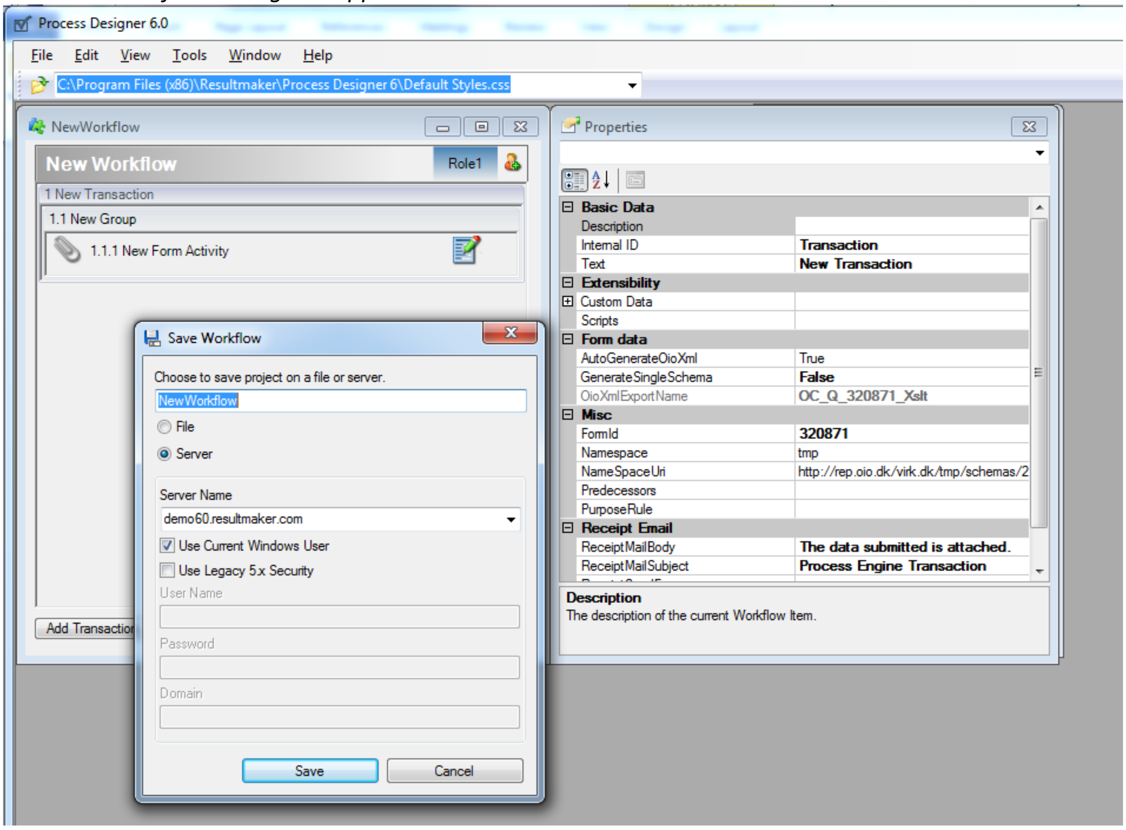


Figure 14: The Save Workflow dialog box

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.

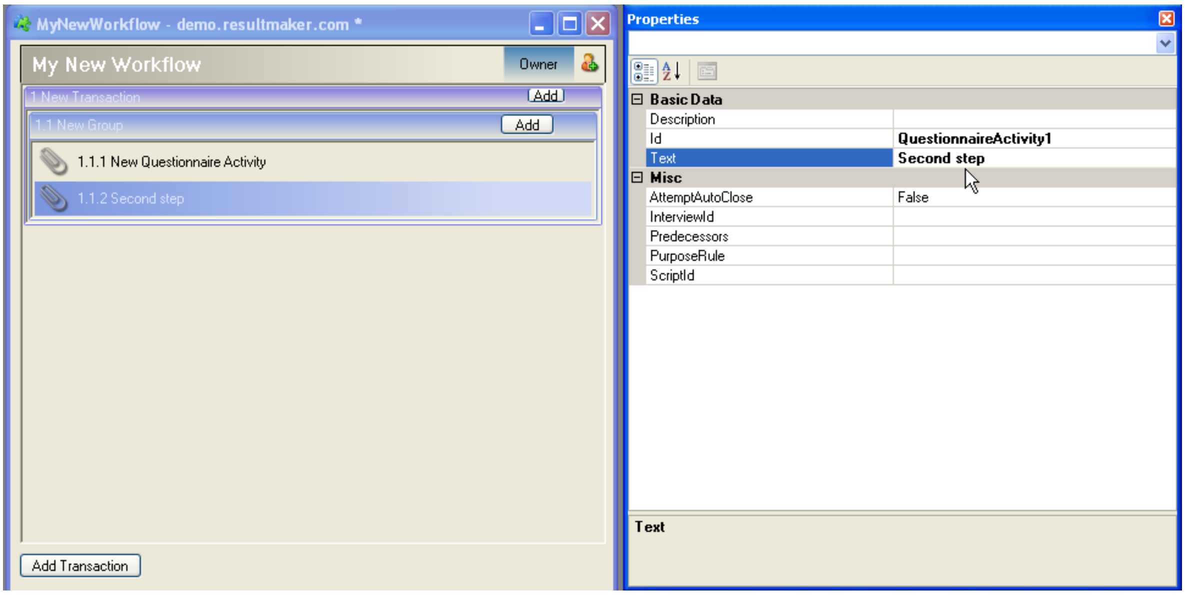


Figure 15: Renaming an activity

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.

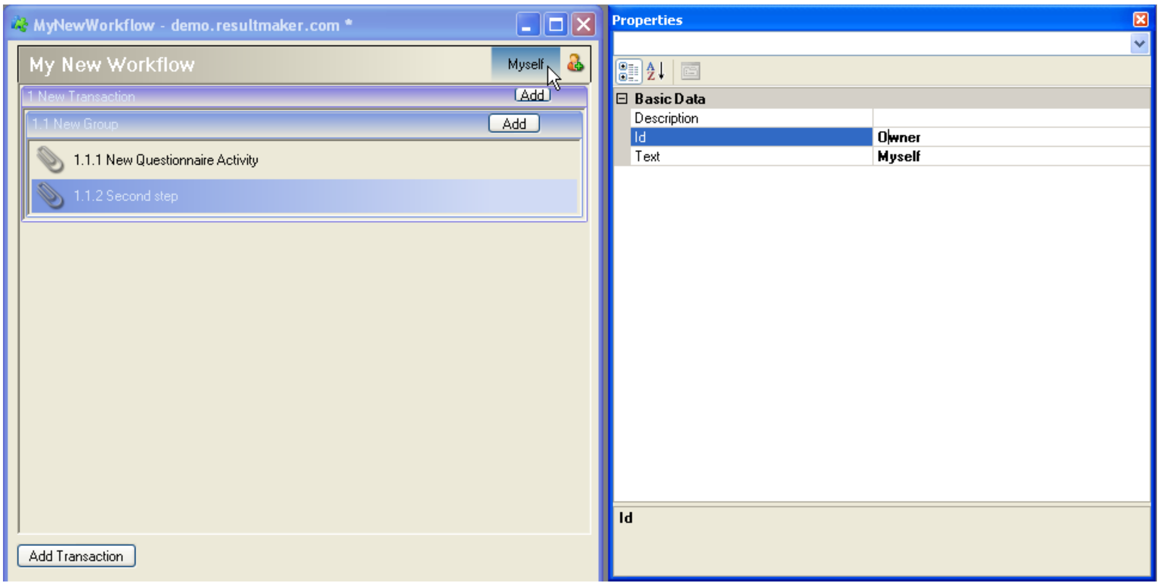


Figure 16: Renaming a role

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.

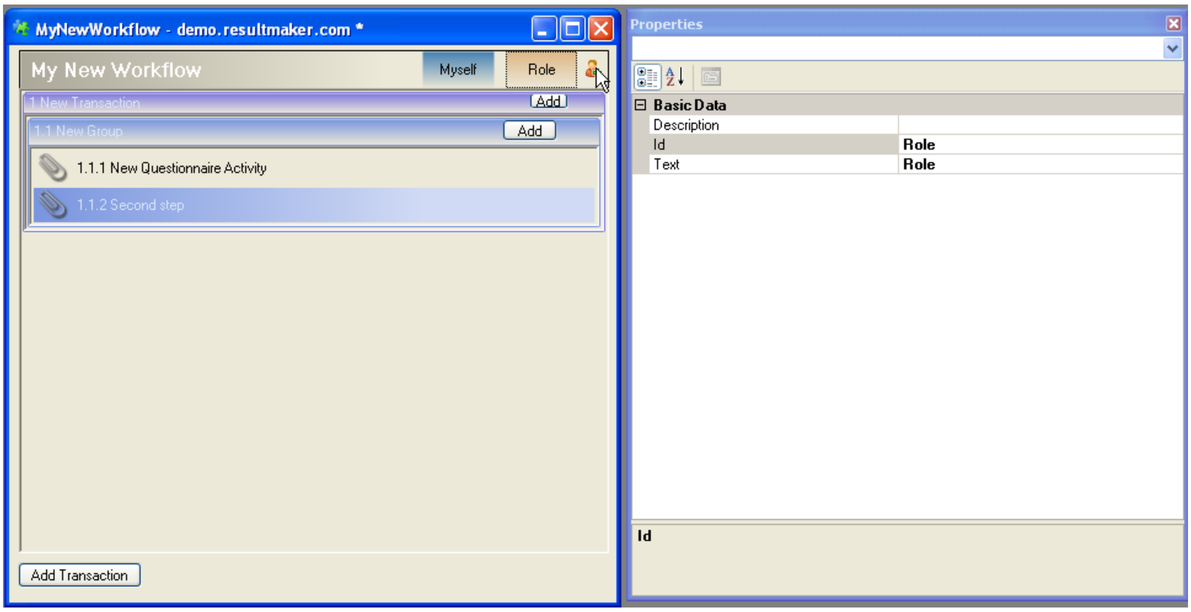


Figure 17: Adding a new role

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.

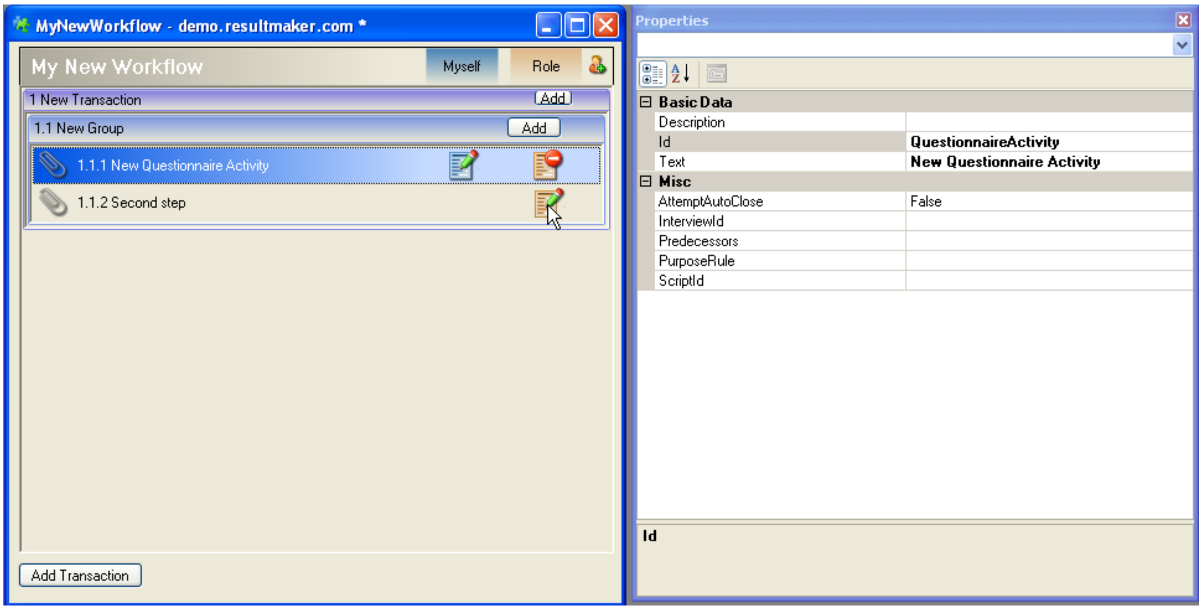


Figure 18: Assigning rights to a role

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

	**Deny access**. The user having that role will not see the step, not even in the workflow menu.

(***No icon***)	**Read access**. The user having that role can see the step in the workflow menu, can select it and 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:
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.

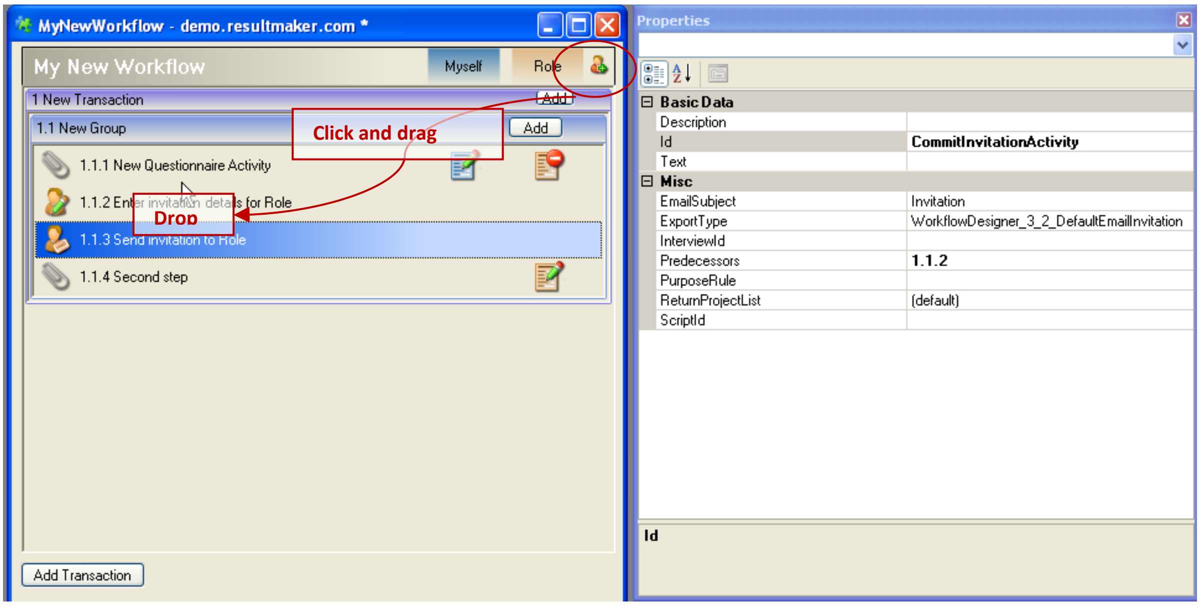


Figure 19: Inserting an invitation activity

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

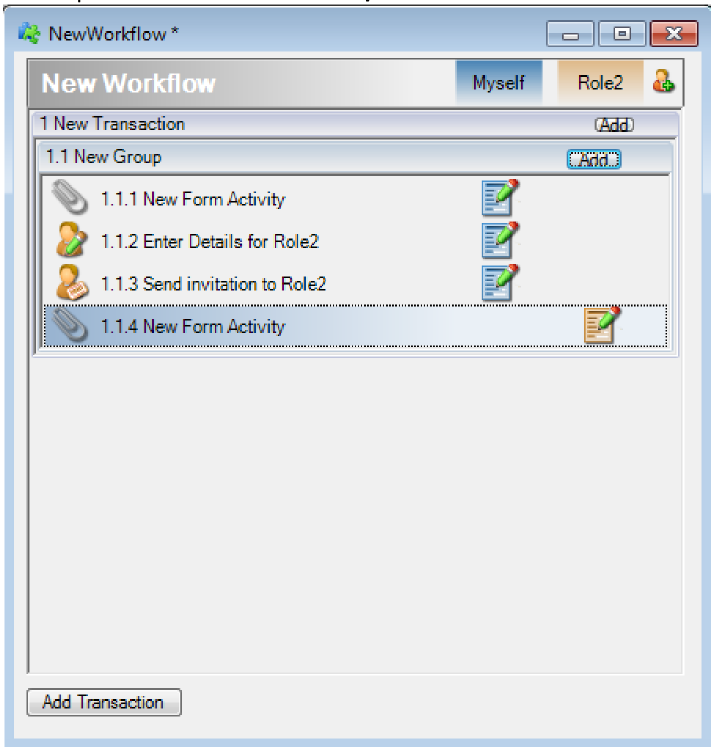


Figure 20: Determining access rights

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.

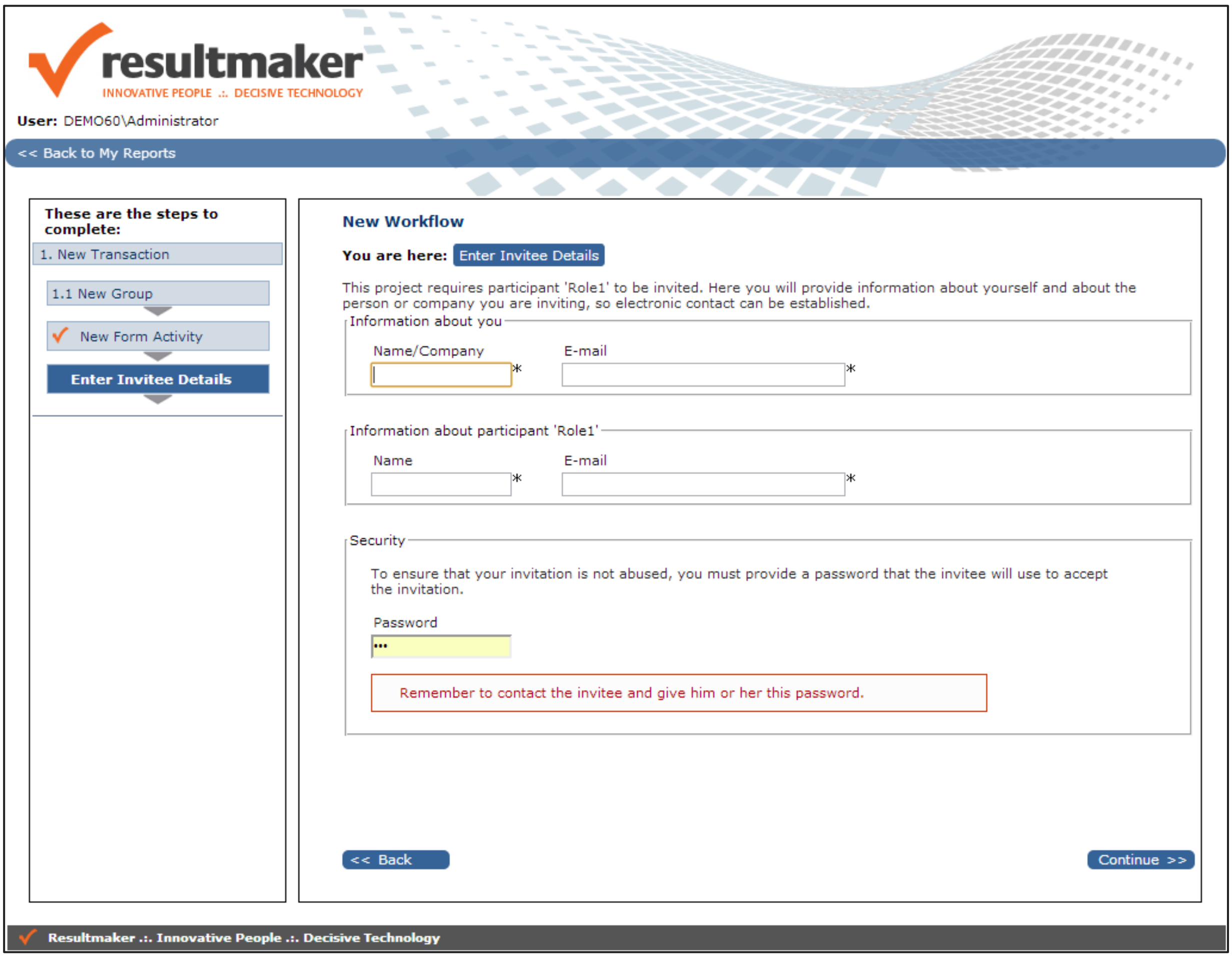


Figure 21: A run-time view of the invitation step.

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.**

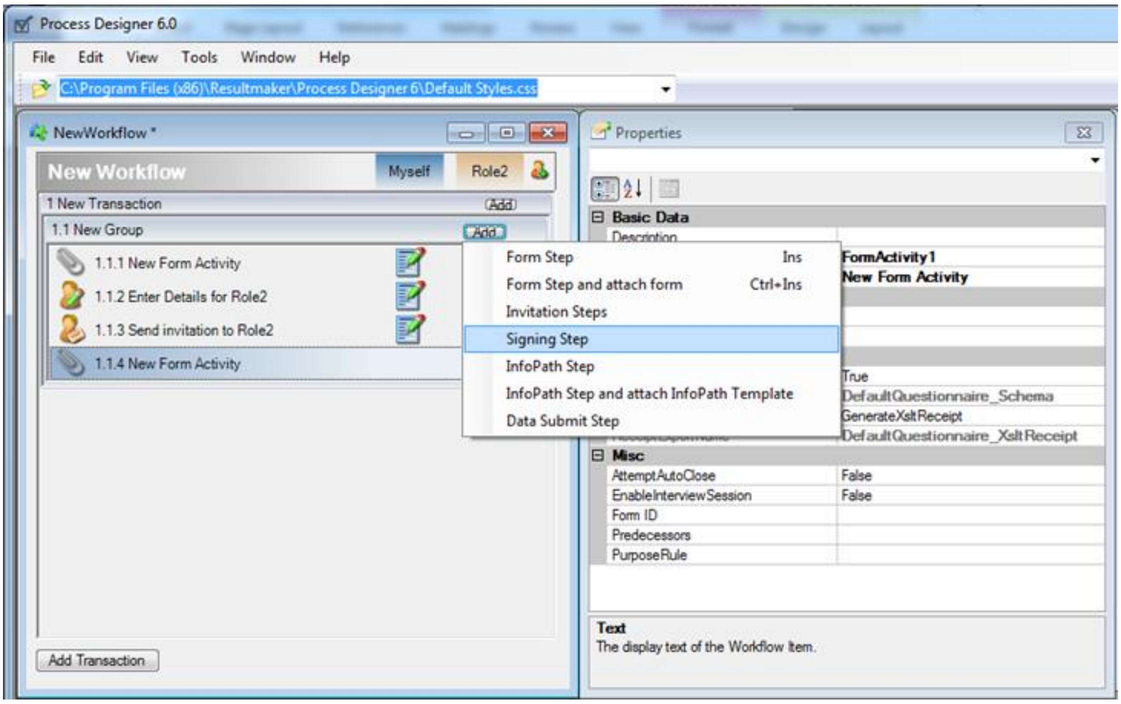


Figure 22: Inserting a signing step

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).

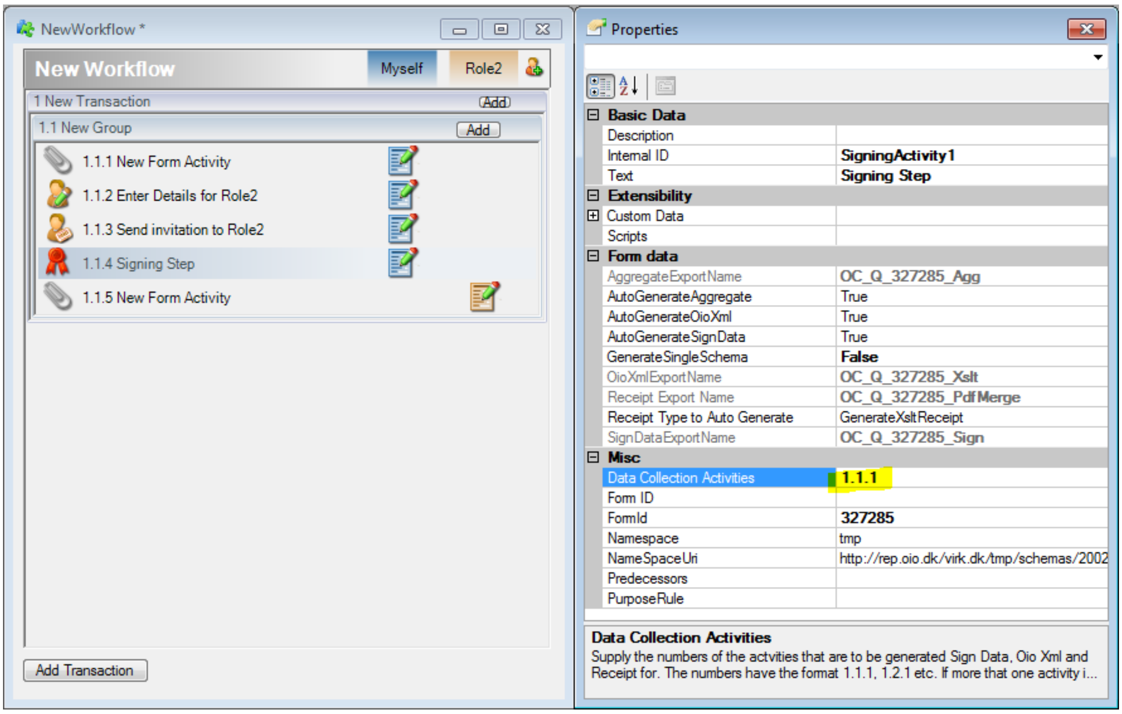


Figure 23: Defining a form step

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.

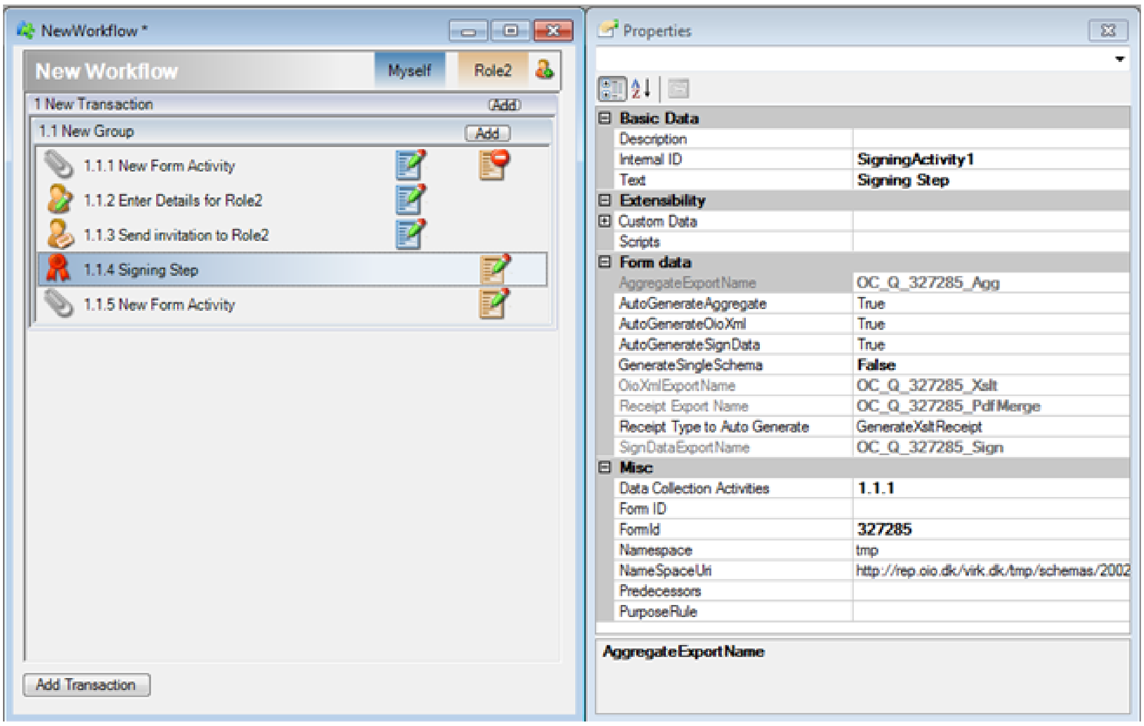


Figure 24: Assigning a role to the signing step

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

18 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				Pre-dec.	Purposes				Purpose handling	Specifikation / Questionnaire ref.
							A	B	C	Rule		
		CEO	Case Worker	Mana-ger	Auto	[bold = **logic**, else **seq-uence**]	Rich 50%	Hurry 50%	Accept 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		**B**	**C**	**And**		Payment step for express payments if in a hurry
2.4	Normal payment		E		X	2.1, 2.2		**Not B**	**C**	**And**		Payment step for normal payments if not in a hurry
2.5	Rejection letter		E		X	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

1. 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”)

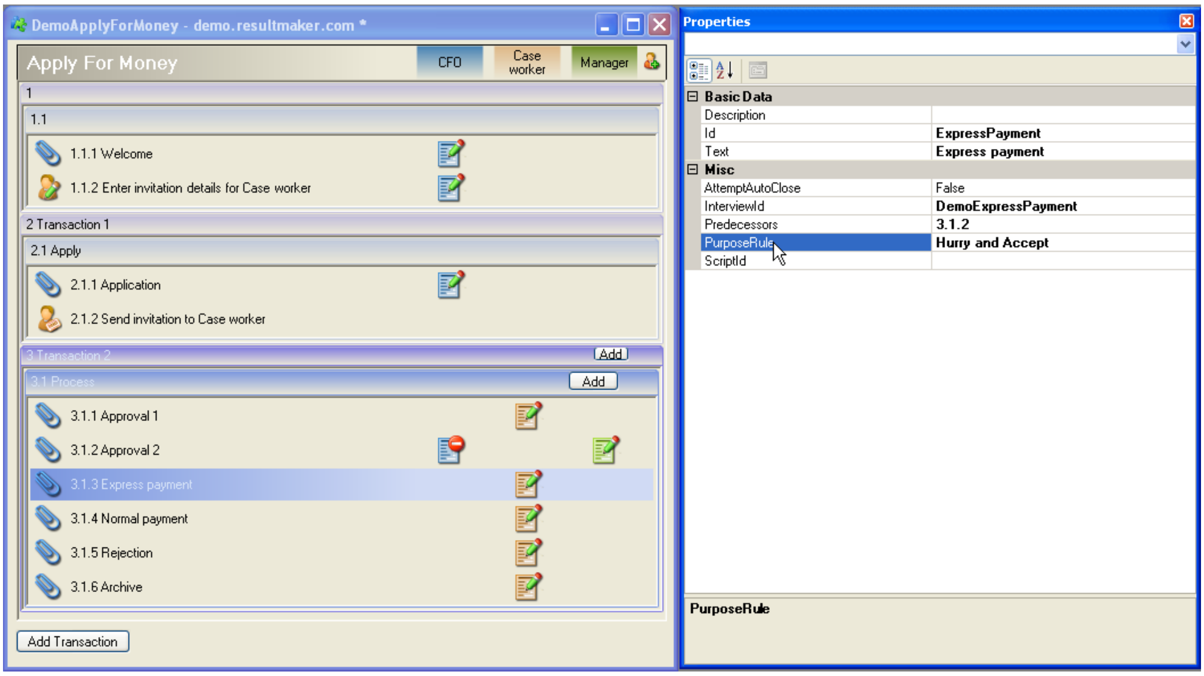


Figure 26: Purpose rules –- compare the green area of Figure 26 (see row 2.3) –- are edited in the Properties window of the activity highlighted. Boolean expressions are allowed ("Not", "and", "or", and parentheses)

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

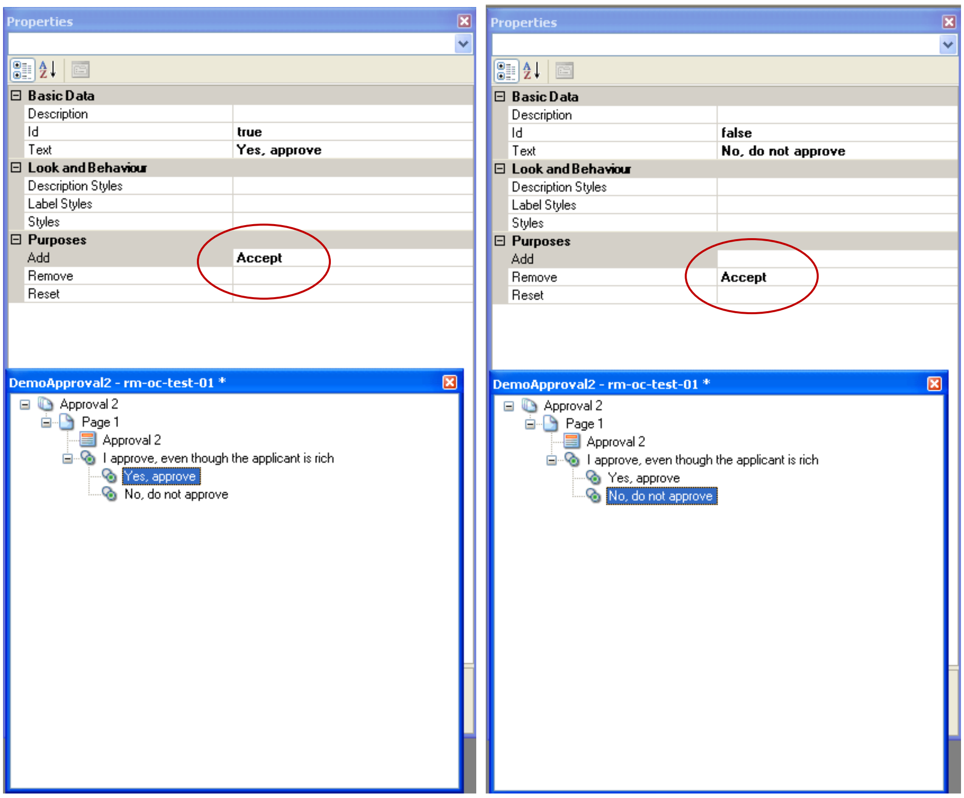


Figure 27: Setting purposes depending on answers.

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.

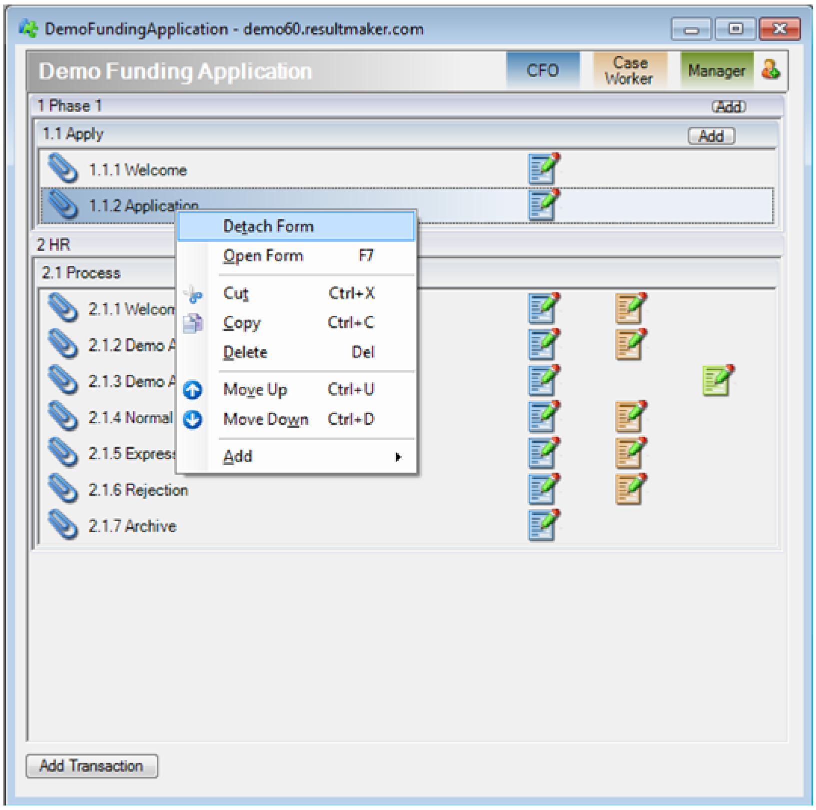


Figure 28: The Workflow Designer window

2. 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

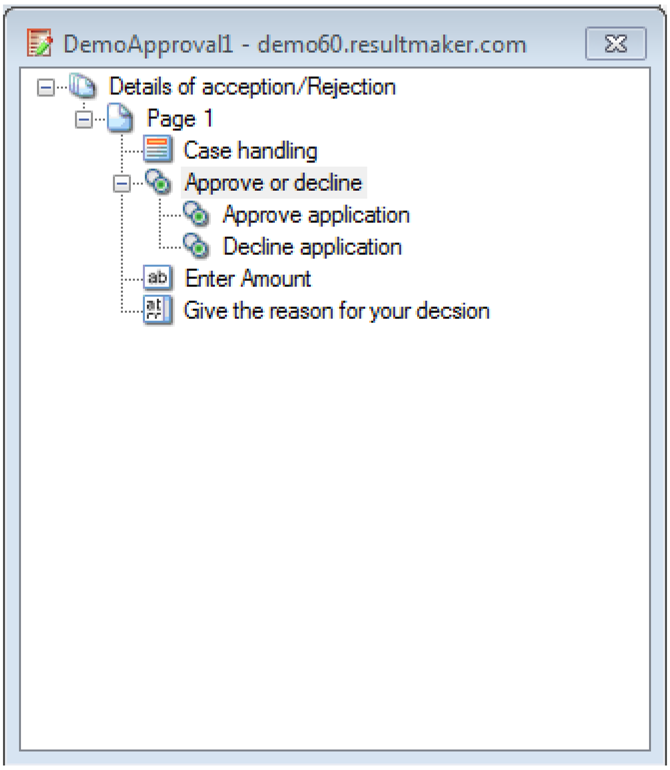
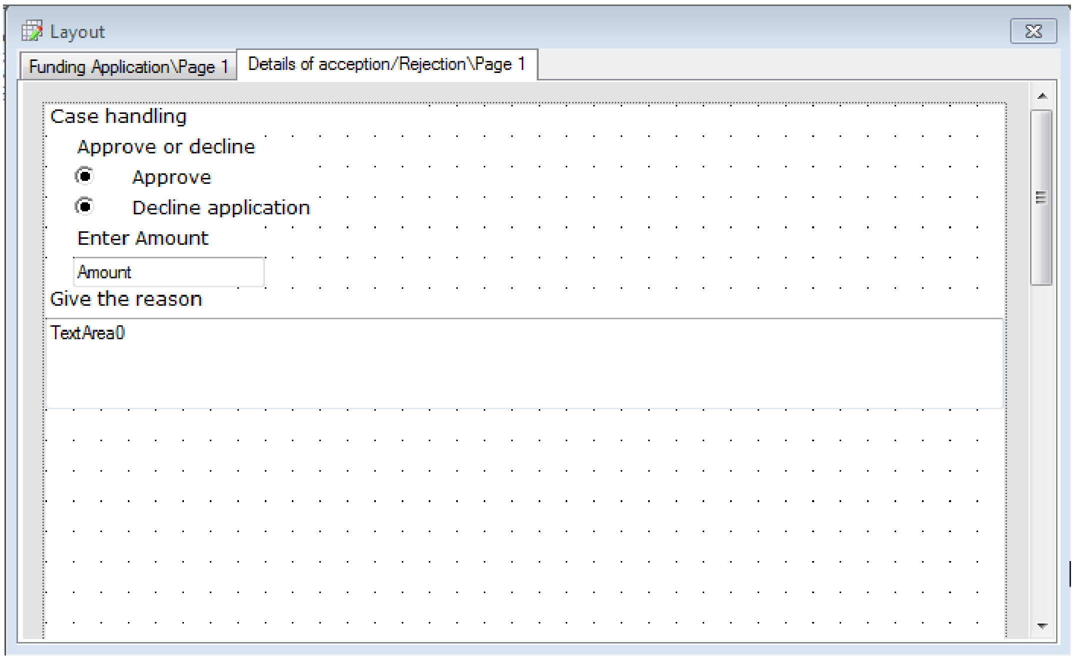
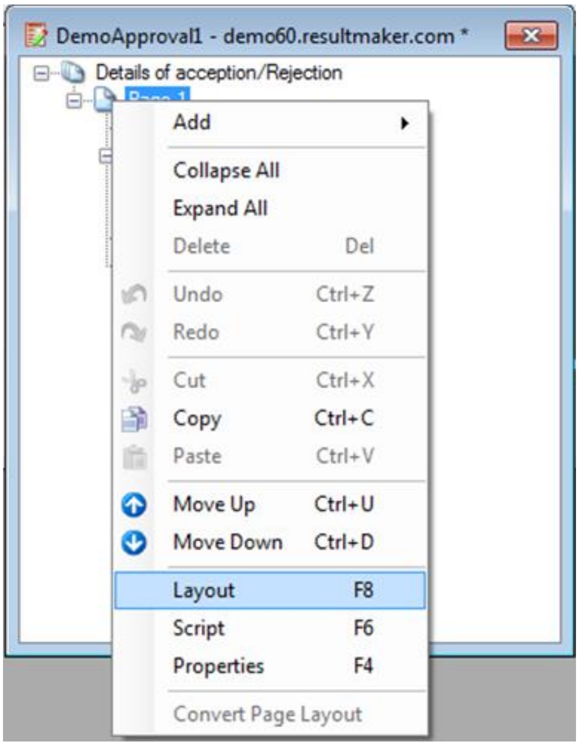


Figure 29: The Form Editor

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.

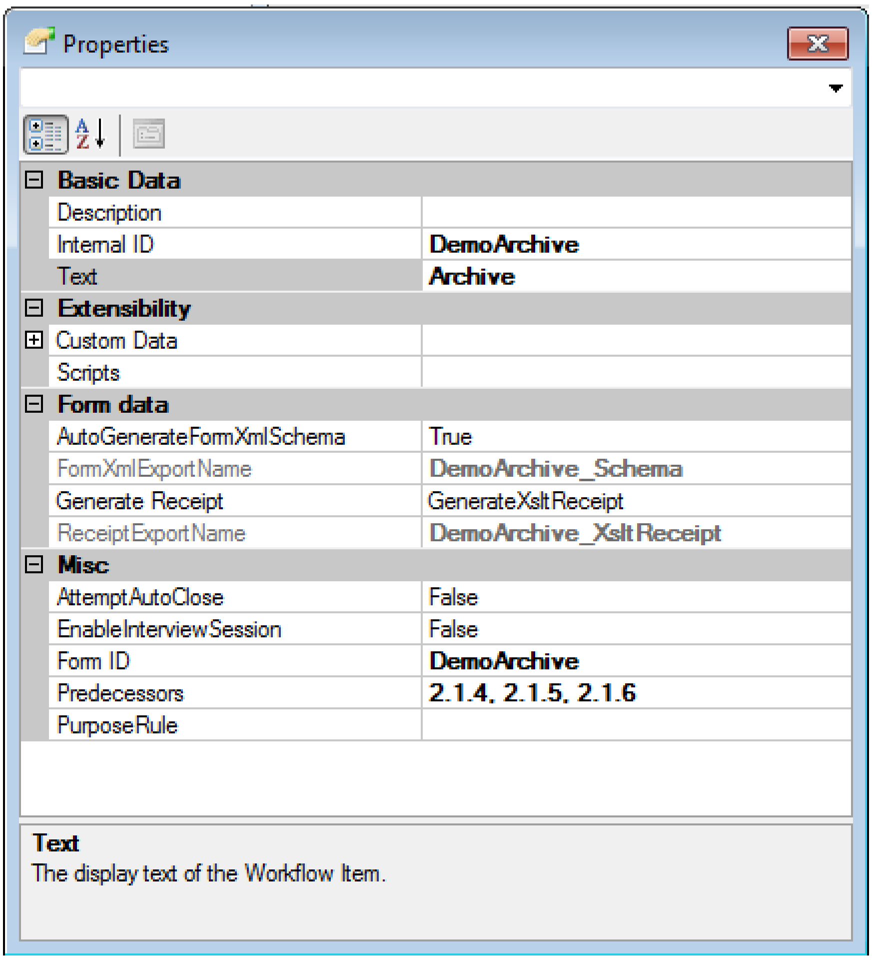


Figure 30: The Properties window

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

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

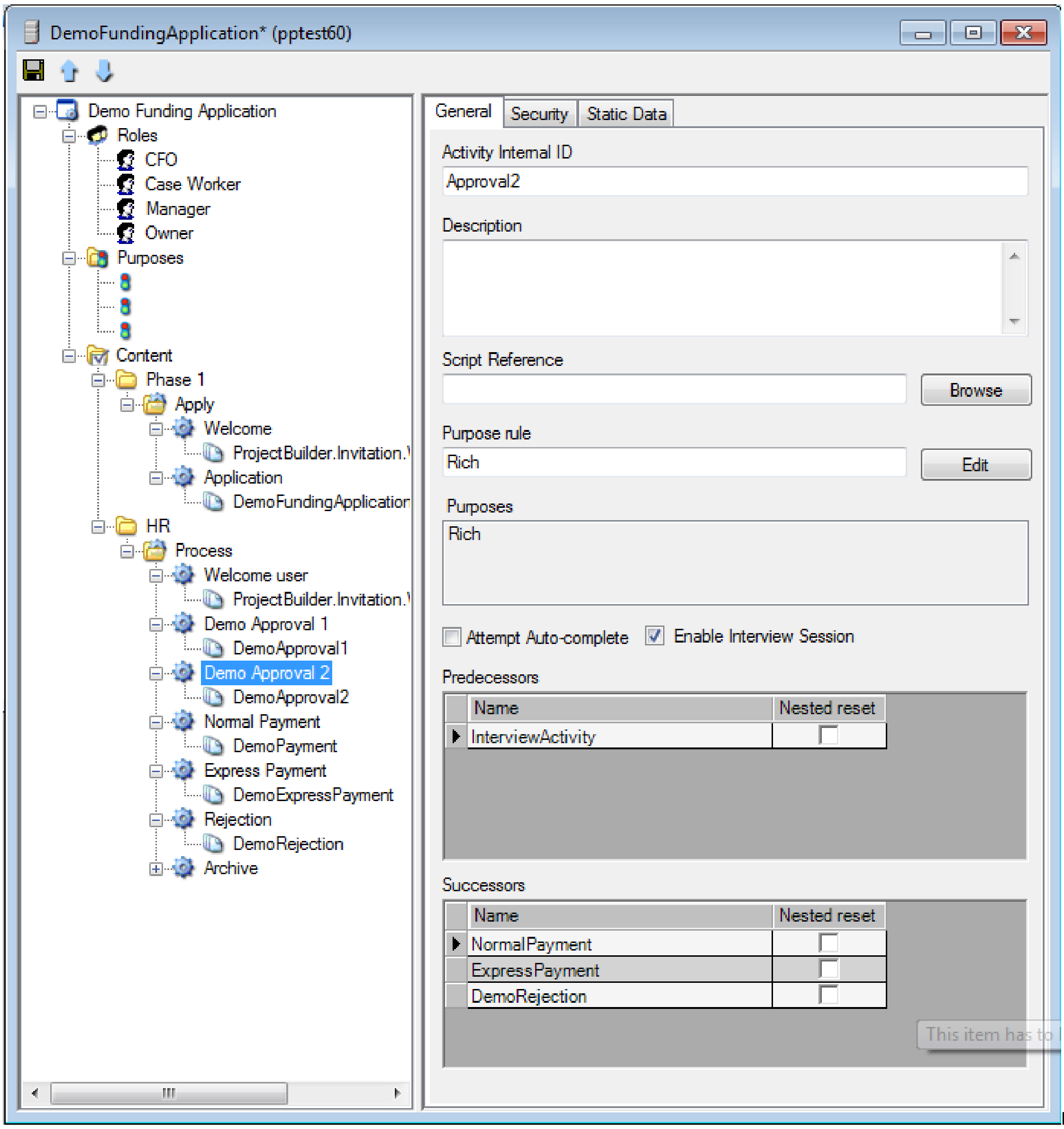


Figure 31: The Workflow Editor

9 Process Platform Component Overview

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

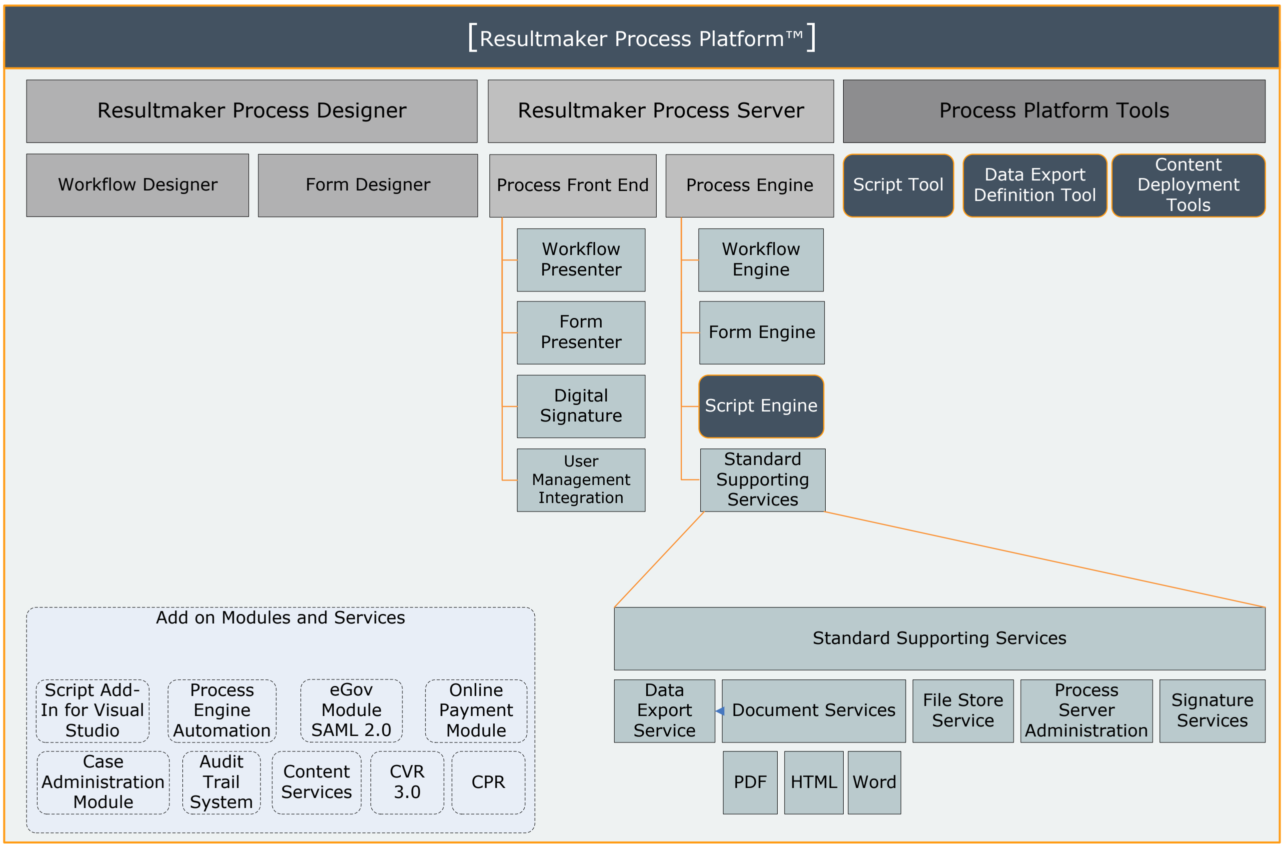


Figure 32: Resultmaker Process Platform component overview

Please consult Resultmaker for further information.