User Manual for Process Design in Resultmaker Process Platform™

Document version: 6.0.0

This is a user manual for process design with Resultmaker Process Platform™. It helps the user to understand the concepts of the design tool *Resultmaker Process Designer* at a high level, focusing on the *design of process (and not on forms and decisions)*.

Follow the instructions in text and illustrations, and when you are through, you will know how tobuild a workflow along with knowing the concepts.

Targeted versions are:

Process Designer 6.0

Process Engine 6.0

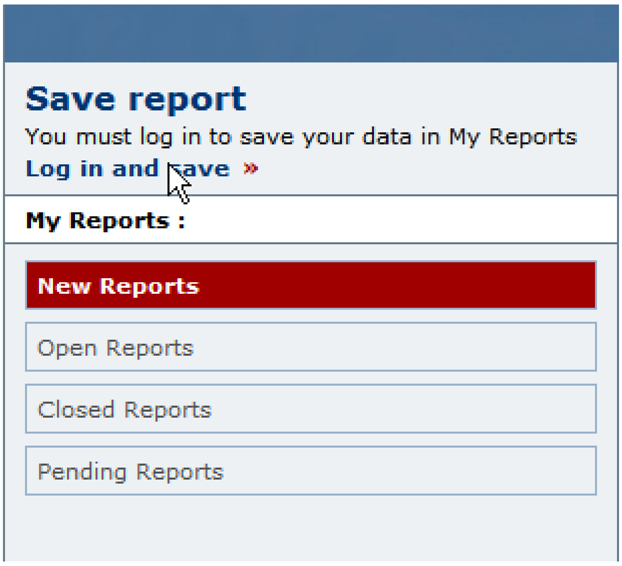
Table of Contents

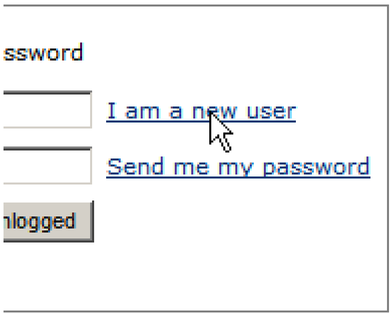
1 Getting started with Process Design

This section describes the basic concepts of Process Design. See section 2 for more advanced topics.

1.1 Login to the server

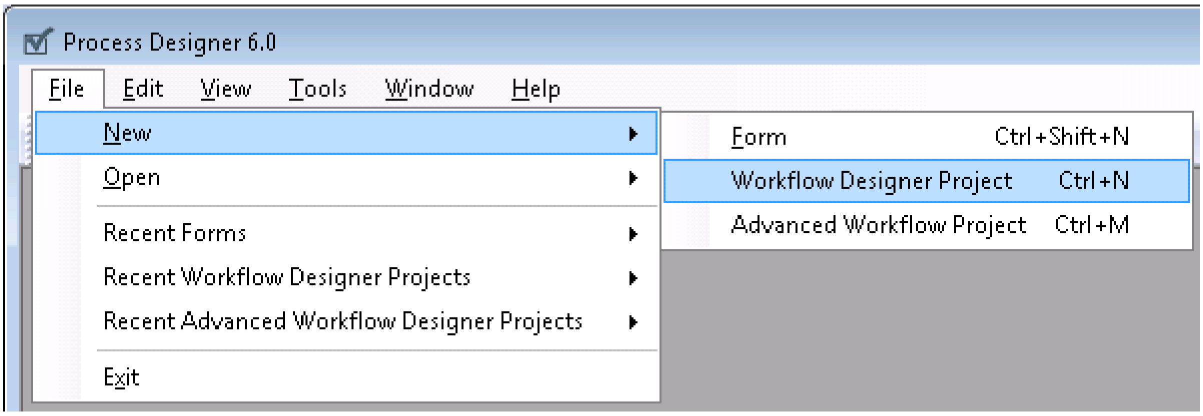
To get a password for the server simply open a browser: demo.resultmaker.com and create a new user: Click on the link "Log in and Save" and select "I'm a new user". State your wished informations and hit Ok.





1.2 Open the design tool and create a new workflow

When you open Resultmaker Process Designer from the Start Menu on your computer, you will see an empty design area. Process Designer is now ready for you to create a new workflow. From File menu, select New | Workflow Designer Project.

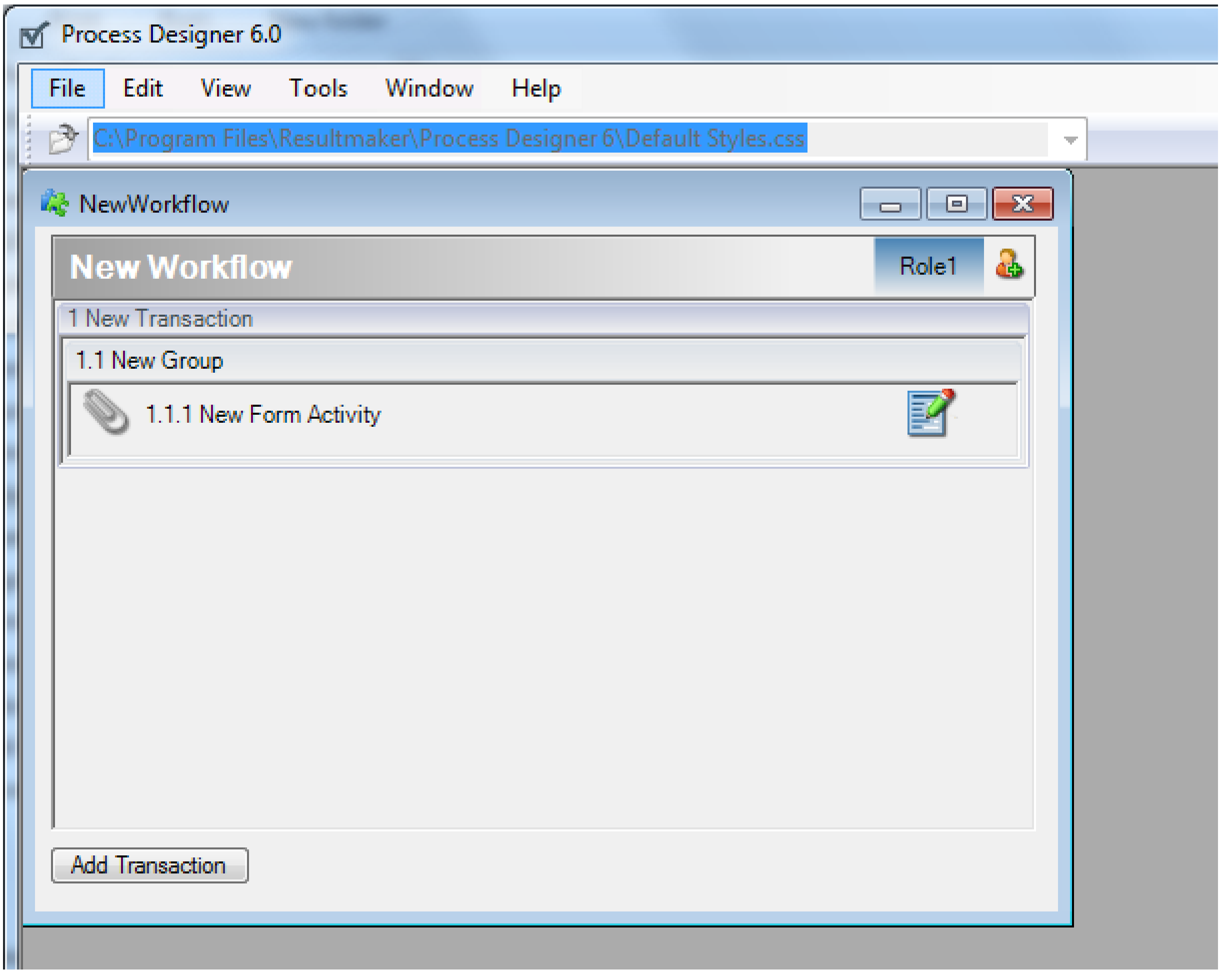


Start off by naming your workflow and select the server you want to save it to. This gives you the option of using the preview function from the very beginning.

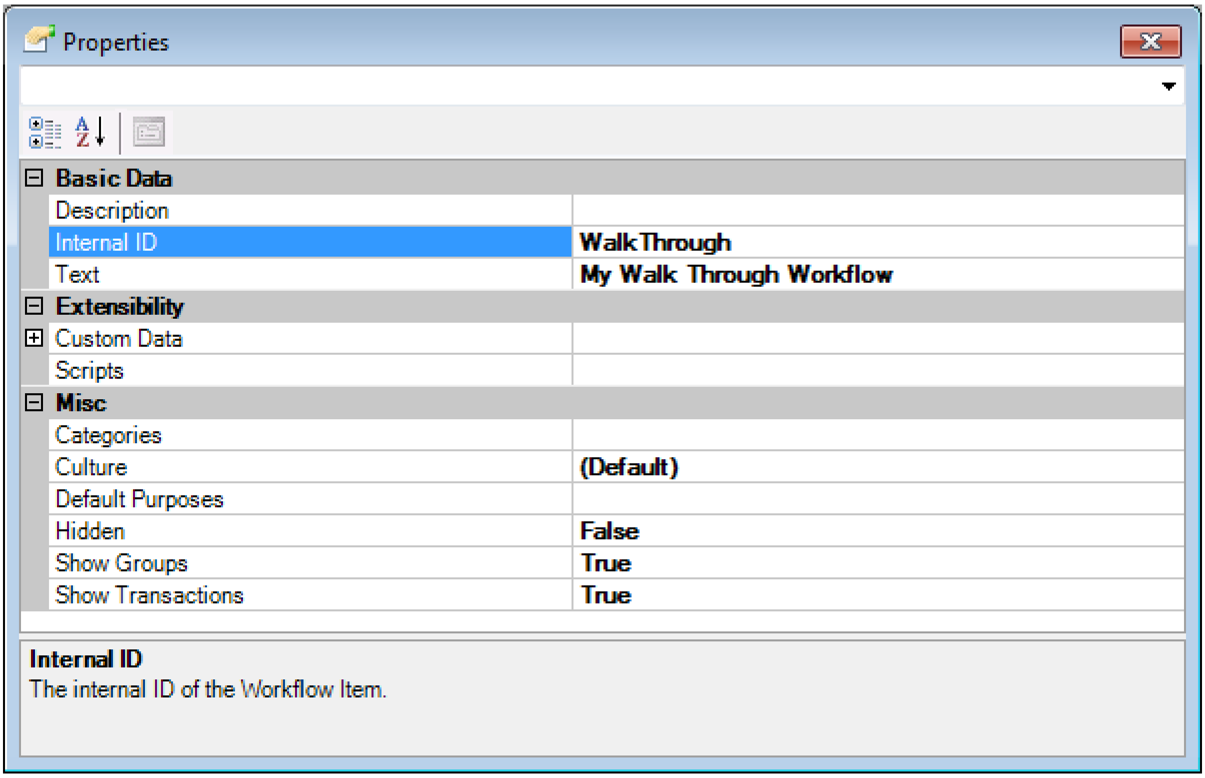
1.2.1 Name your workflow in the Properties Window

All names on all levels are defined in the Properties Window. View it by selecting View | Properties or hit F4. It's a good idea to keep this window open and visible at all times as you will need it as one of your primary working planes.

Now select the workflow level (click on "New Workflow). This gives you the properties for the workflow level.

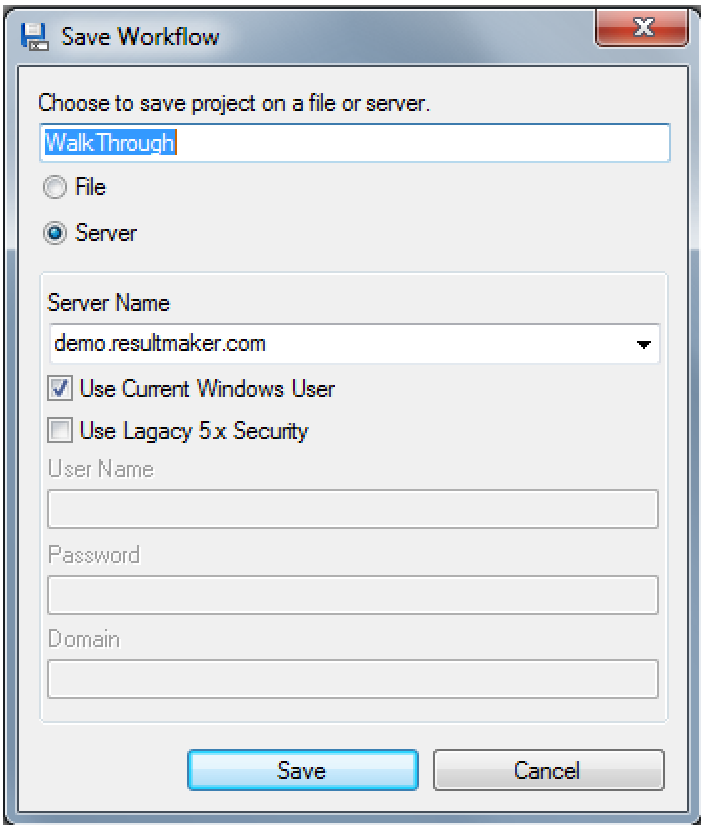


In the Properties Window you write the Id and the name for your workflow. The Internal ID must be without spaces and in 'ordinary' characters – this is the system's reference to your workflow, and this is also the name you need to use, when you search your workflow on the server. Write the name in the 'Text' field. This can contain the characters you wish – this is the text shown to the user on the user interface.



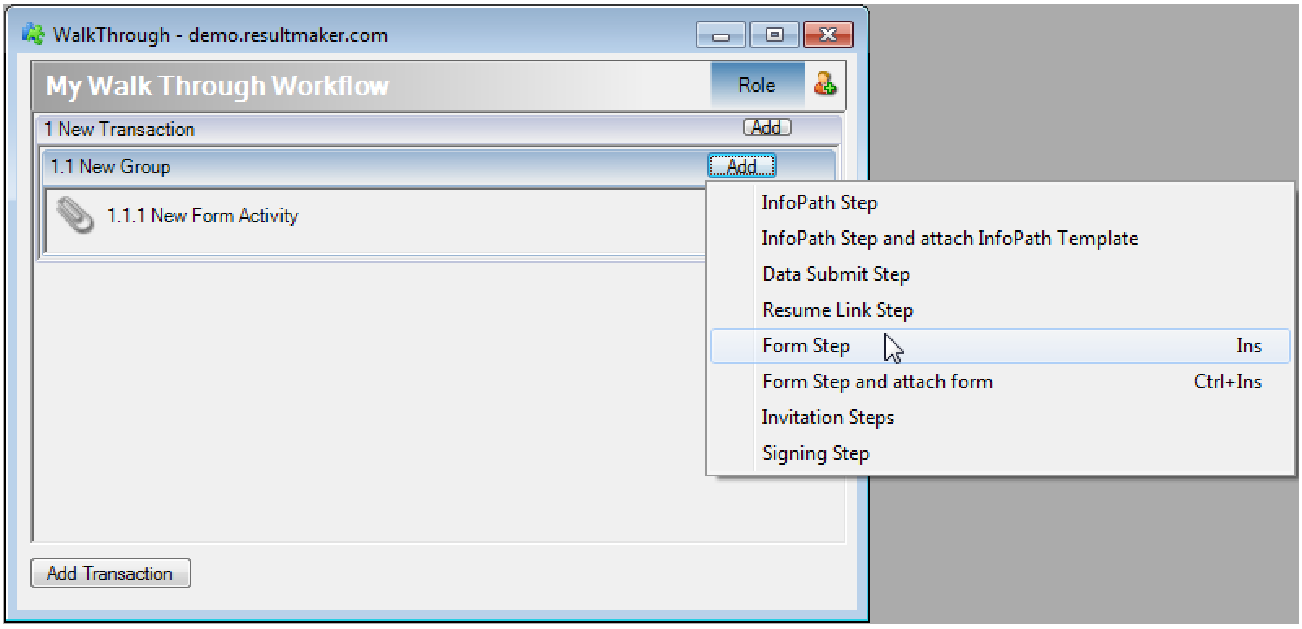
1.2.2 State the server name and save your workflow

Select File | Save As to save your workflow . Get used to saving it to the server as this gives you the opportunity to re-use. Save to file you can use, when you need to bring your work along with you. You.

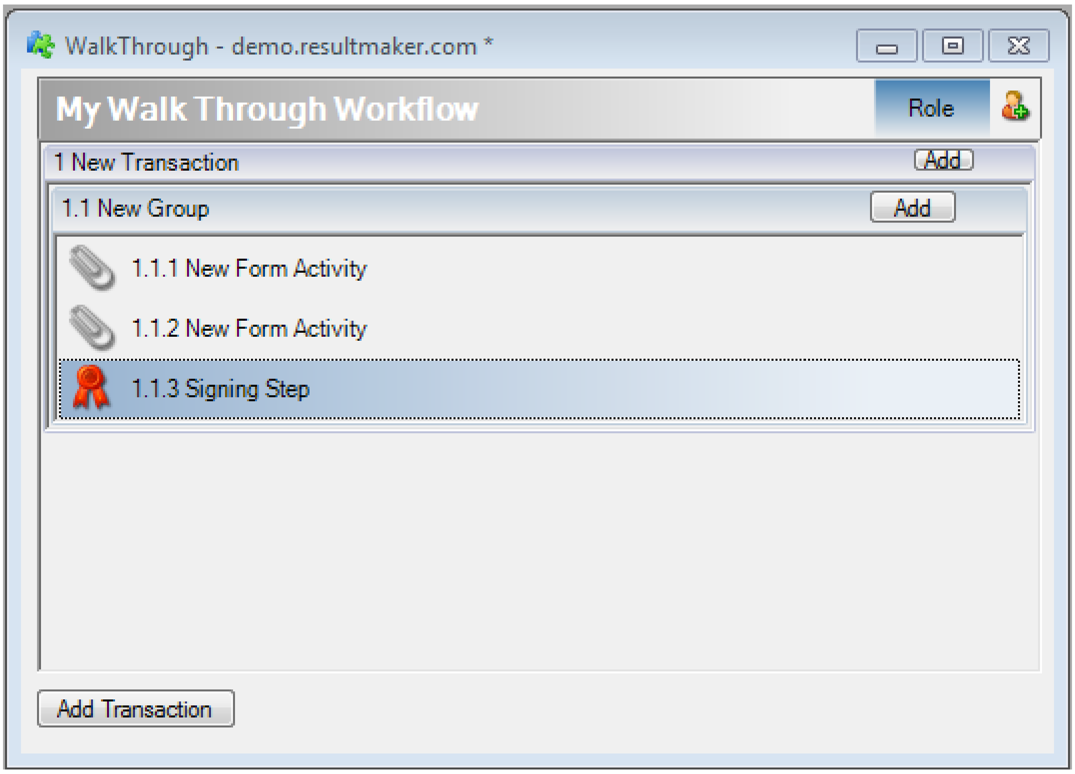


1.3 Build your workflow by adding Steps

You are now ready to define the steps of your workflow. Select the group and you will activate the Add-option. Now choose a Form Step (or hit Insert-key) to make a step with an electronic form.

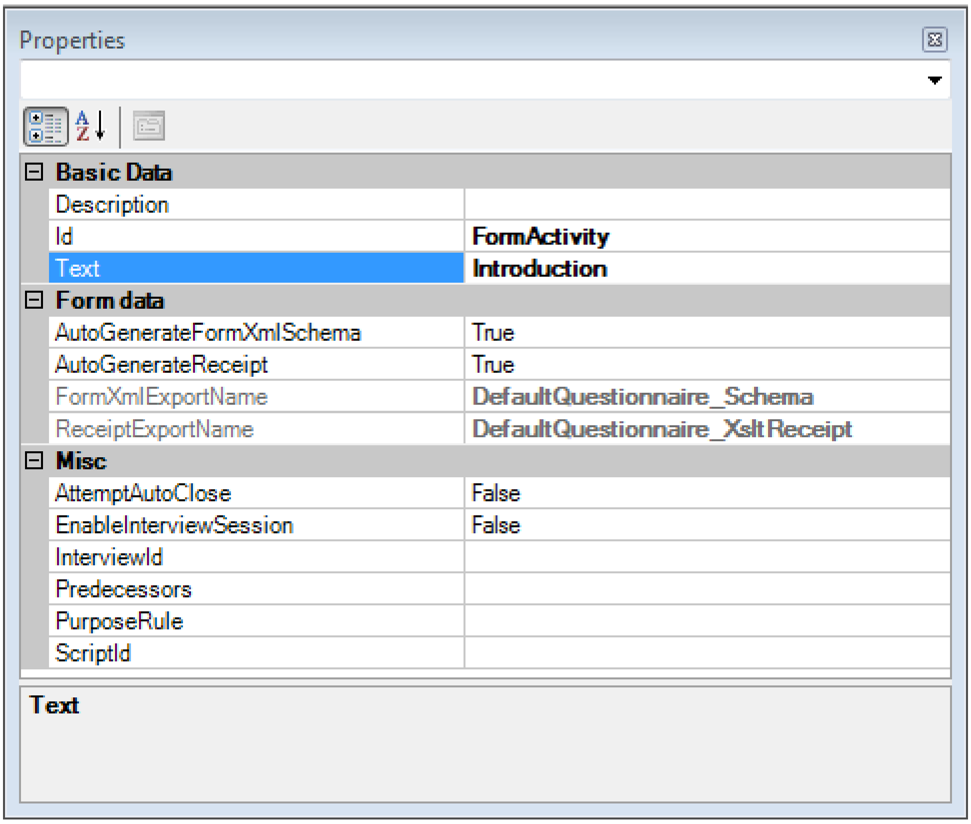


Make a workflow with two Form Steps and one Signing Step



1.3.1 Name the steps like you named your workflow.

Name each step in the Properties Window (F4)



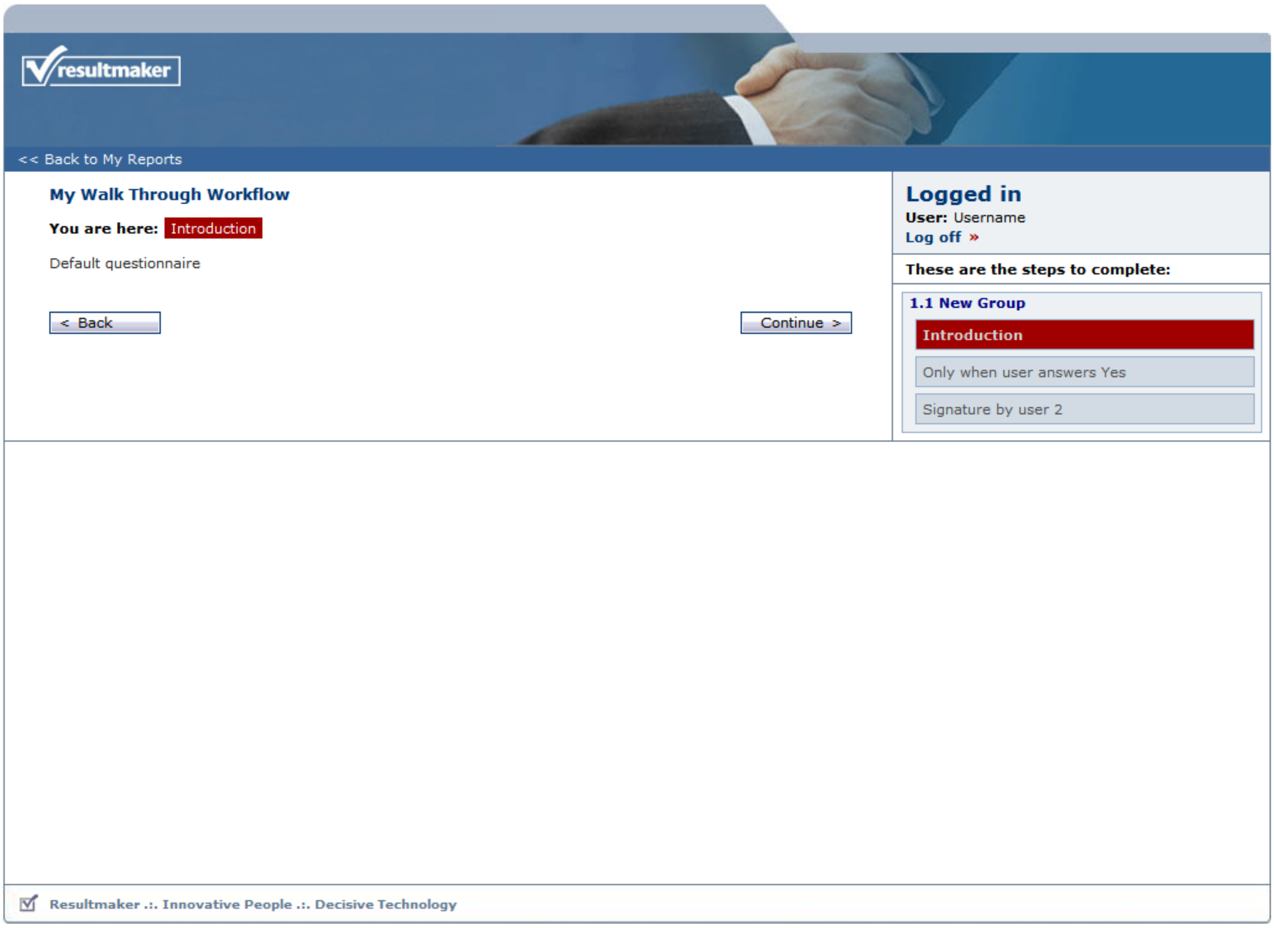
Name your Steps so they correspond with this guide:

- Introduction
- Only when user answers Yes
- Signature by user 2

1.3.2 Preview your workflow

Now you can already preview your 'final' workflow: Select Tools | Preview from the menu, or hit F5.

Notice! Make sure you have activated the workflow window – and not the Properties Window – to preview.



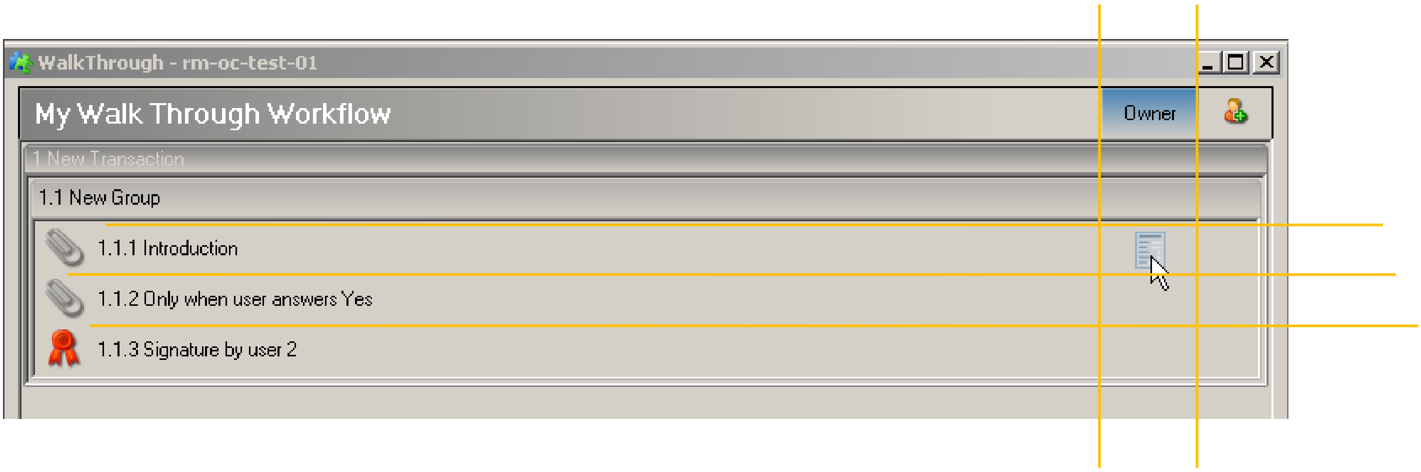
To the right you see a list of your three steps. You haven't yet associated user rights, so you cannot yet move away from the first form. The form you see in the middle is a default form.

1.4 Activate the process by associating user-roles to the steps

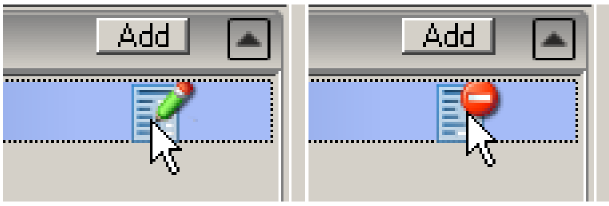
To access the forms in the workflow from the end user perspective (the browser), you will need to associate user-roles to each step/activity. The easiest way is to start with only ONE role, as this gives you an easy way to test the logic and content of your workflow in the browser – without toggling between various user accounts. (we will add more roles later).

As a default, all steps are set to 'read'-activity by the 'owner'-role.

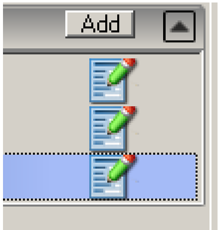
Mouse over the area between one of the steps and the 'owner'-role, and you will see a small icon. This icon means 'read'-activity, and it is placed in a matrix grid, where the steps represent the vertical 'lines' and the roles represent the horisontal 'lines'.



Click once on the icon to change the step to a 'write'-activity and once more to change it to a 'hidden'-activity.



Set all 3 steps to 'write'-activities in the Walk Through example and try it in the browser (Preview / F5)



1.5 Refer to real forms

You are now ready to refer to the relevant forms. You will find pre-made forms to play with on the server demo.resultmaker.com. If you wish to create your own forms, you can read the user manual for Resultmaker eForms Designer™

You refer to forms (and other content) by 'attaching' them. They are not really 'attached' but rather 'short cut' as you can still make changes to the forms, and they will change where ever they are attached. Click on the paper clips icon to open the attach dialogue to the server. Select the form, server, user name and pass word. Click 'Find'.

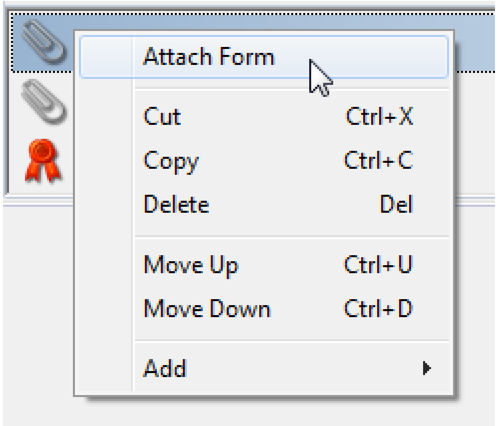
1.5.1 Attach forms

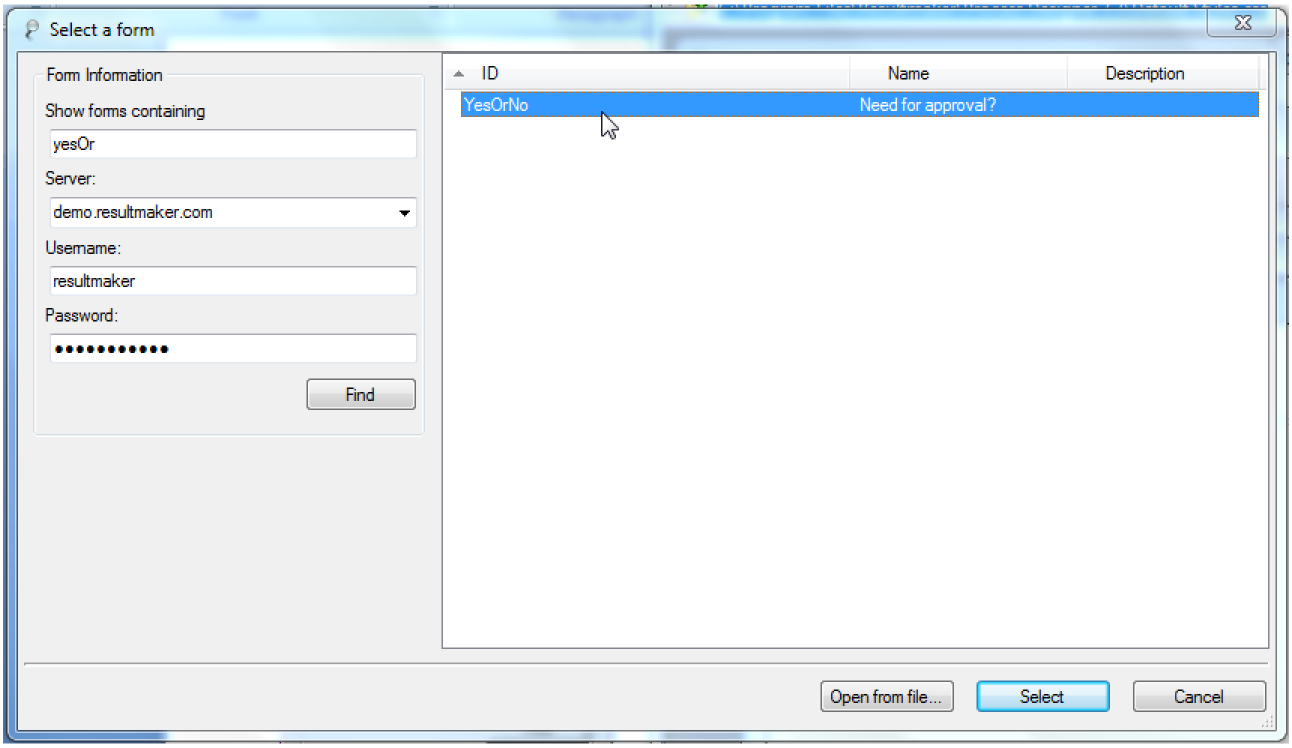
Please attach the following forms to your two form steps, to follow this guide:

Step 1 ⇨ YesOrNo

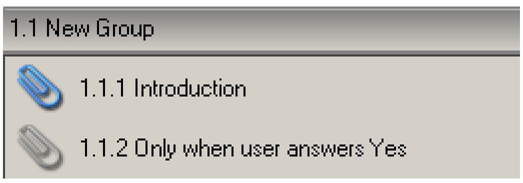
Step 2 ⇨ Approval

Right click on the paper clips for the alternate mouse menu. Select Attach Form. Search for the form on the server and dobble click.





The paper clips turns blue to inform you, that you have now attached a form to this step.



Now continue to attach the approval for step 1.1.2 and preview your workflow (F5) to get acquainted with the forms.

1.6 Set conditions (Purposes)

You will now model the logic of each step.

In this example the following conditions should be the logic of the workflow:

- We only want user 2 to approve if user 1 selects Yes (purpose Yes)

This purpose must be set in two places:

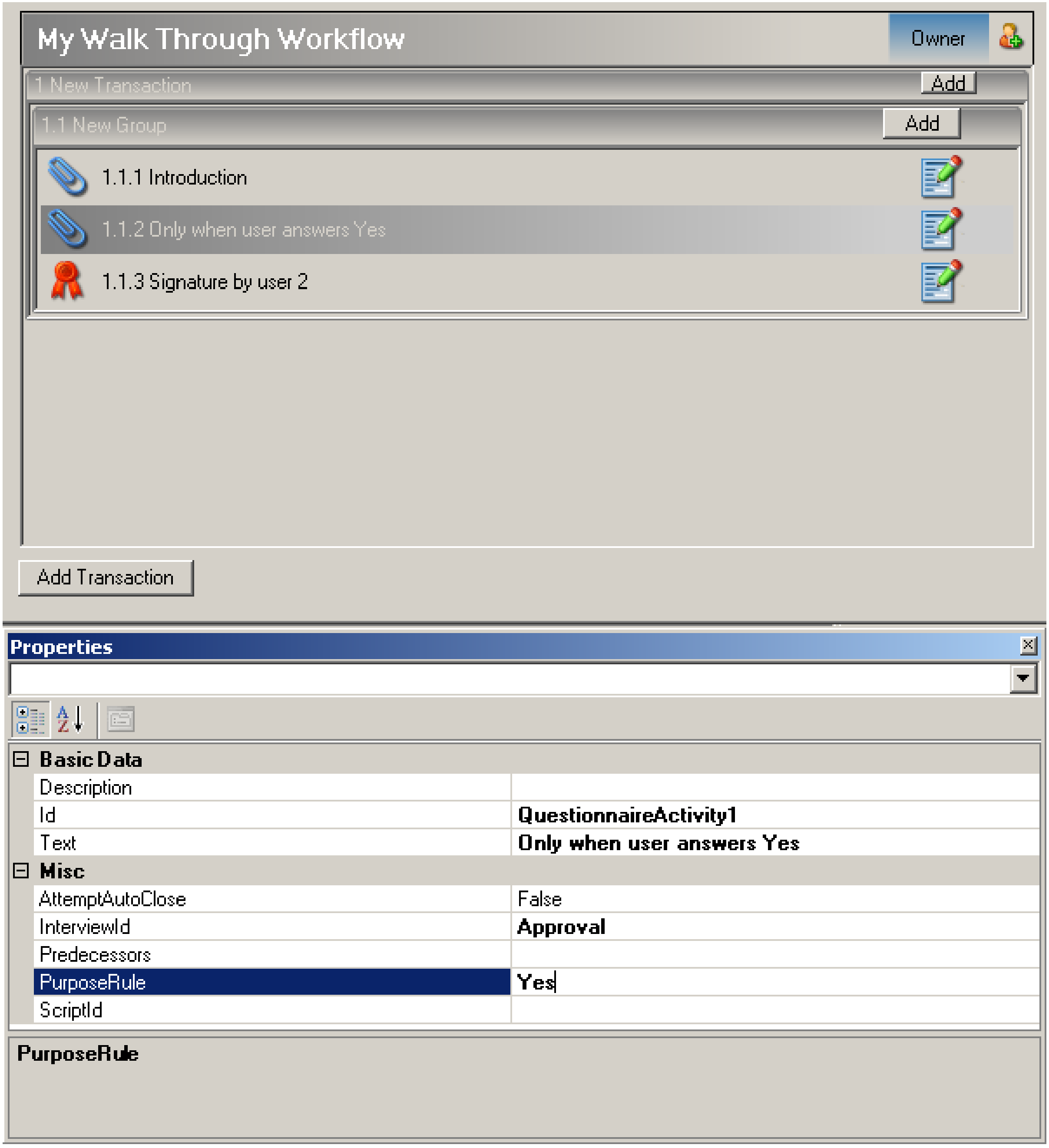
1. On the step that is affected by the purpose (the approval step)
2. Inside the form, where you want the purpose to be activated (on the yes-answer)

1.6.1 State a purpose rule for a step

You state how the various steps should be affected by a purpose, by writing a purpose rule in the property for each step. These rules can be advanced, or they can just consist of a single word. In this case we go with an easy one.

Select the approval-step (step 2) and open the properties window (F4).

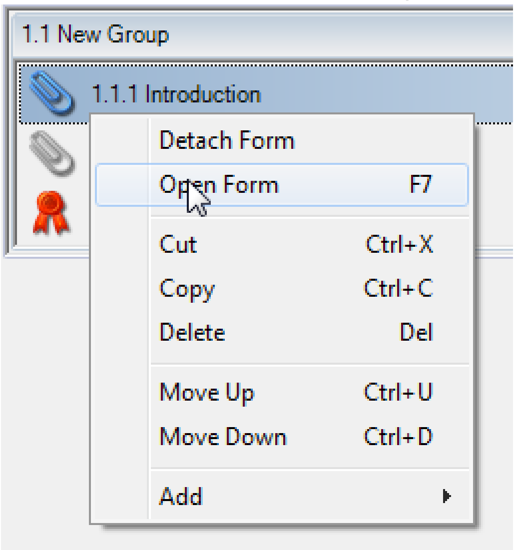
Add a purpose rule next to 'PurposeRule'. Write 'Yes' in the field



1.6.2 Set purpose inside a form

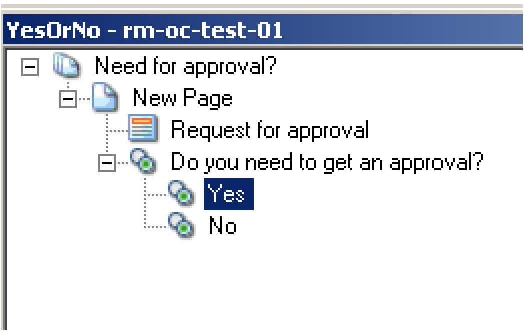
In this example we want the purpose to be set if the user chooses 'Yes' on the 'Introduction'-step. We will set this purpose inside the form

Open the Form 'YesOrNo' by right clicking on the paper clips and selecting Open Form (or F7).

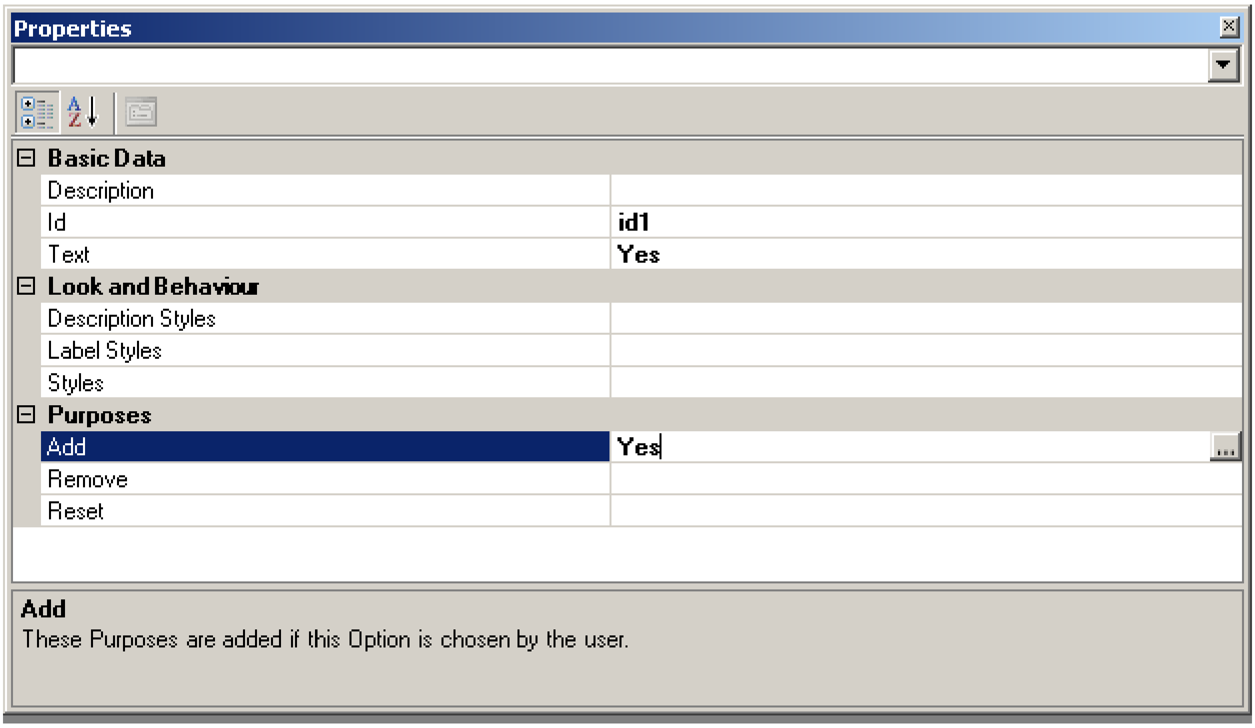


1.6.3 State how the conditions should be set inside the form

Expand the tree inside this form and select the Yes option of the radio button.

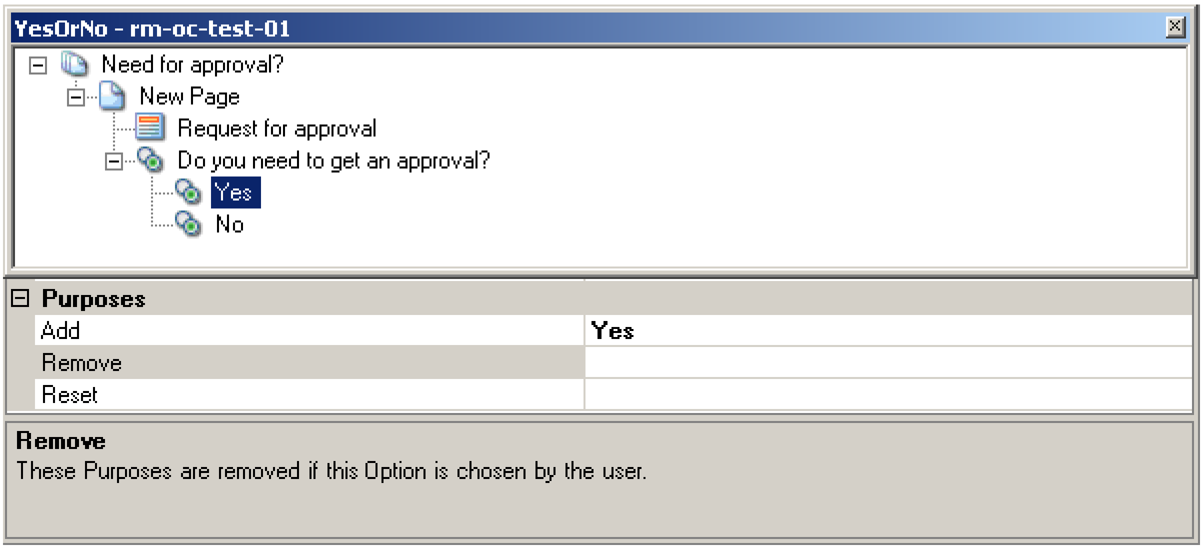


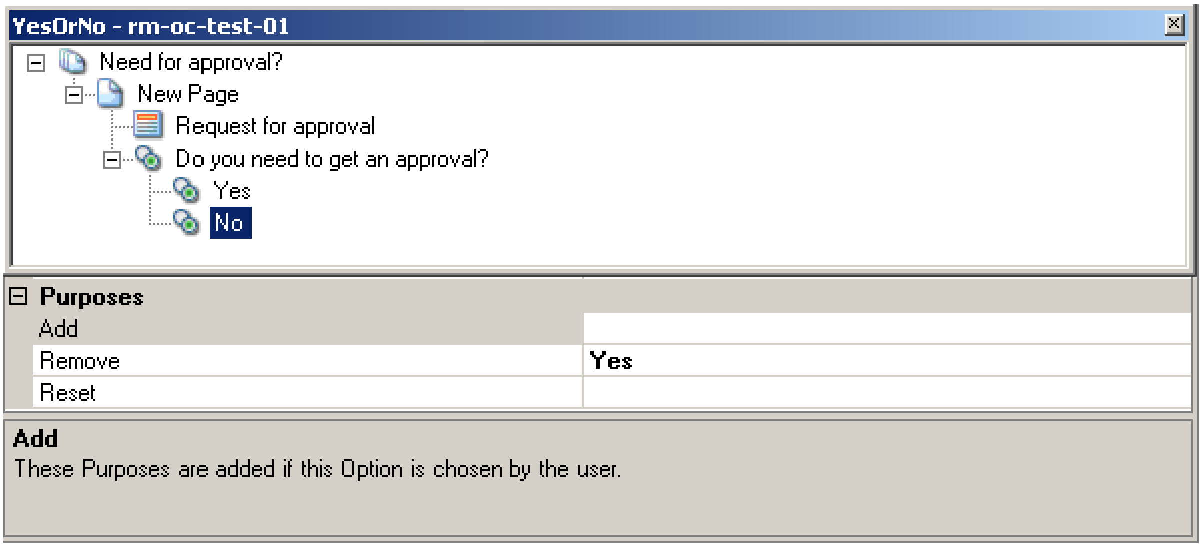
Set the purpose in the properties for the yes option of the radio button by selecting the yes-answer, and state the purpose in the property window (hit F4 if your property window is closed). This is done in the 'Purpose'-section next to 'Add'.



1.6.4 Give the user the opportunity to change his/her choice

Often users click back and forth between choices, when they fill out. Thus it is important, that you make sure to remove the purpose, if the user select No after. You do that in the properties for the yes and the no option:





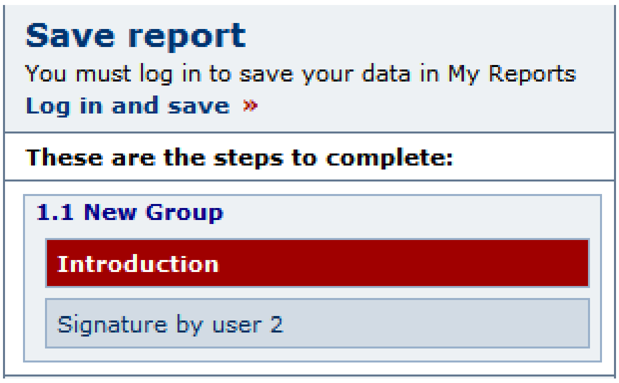
Save your form and close it.

Make sure your form is selected and save it: File | Save.

1.6.5 Preview to test the purposes in the workflow

Test your workflow in the browser by selecting it and hit F5.

When you start, you will see that there is no step two – as this will only be activated, when the user selects the yes option.



Choose the yes-answer and see the step with the text 'Only when user answers yes' will appear.

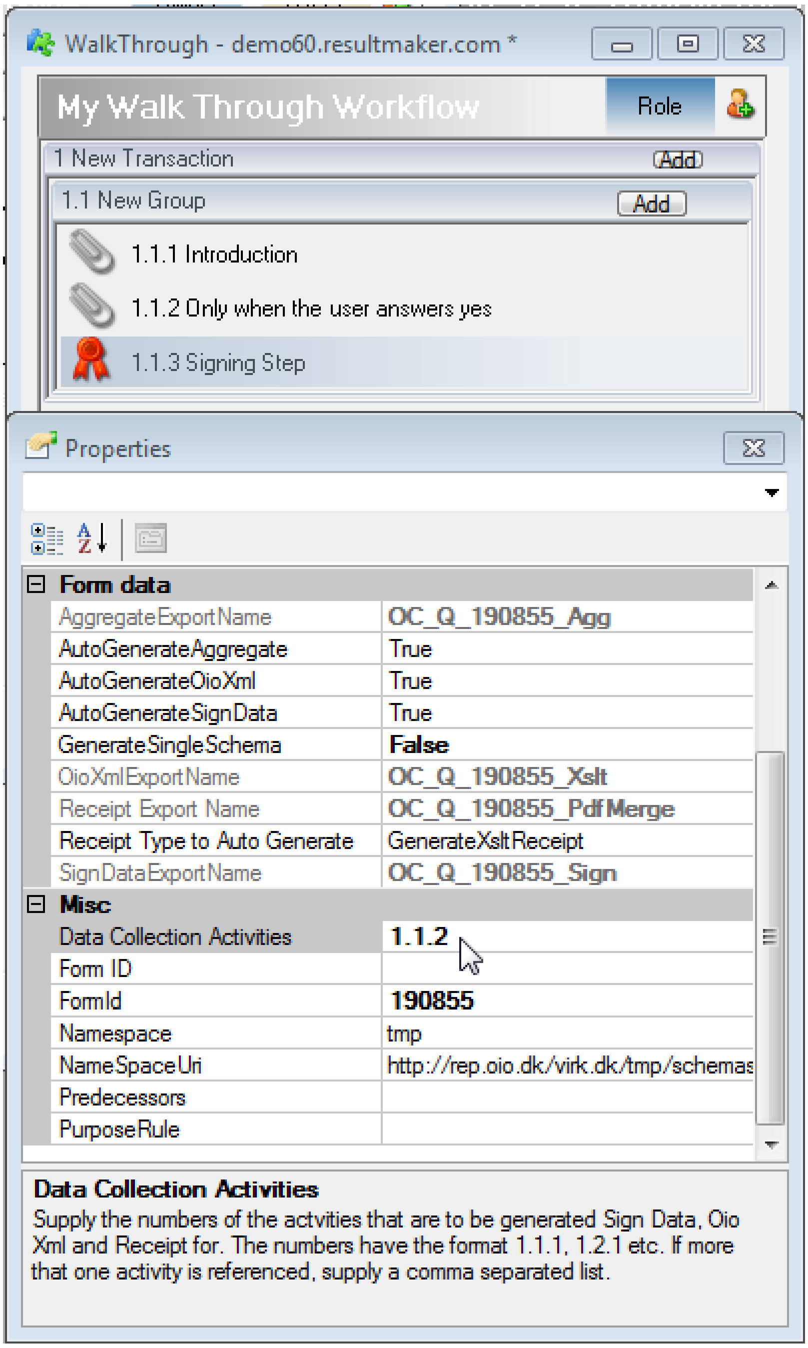
Click back on the 'introduction'-step and change your choice to No – and watch step two disappear.

Now you only need to tell the signing step what informations you want it to be depended on.

1.7 Set the signing information

In this case you want the end user to sign the data typed in in the second questionnaire.

Select the signing activity and specify in the DataCollectionActivities field in the Properties window, the activity from which you want data signed, in this case 1.1.2.



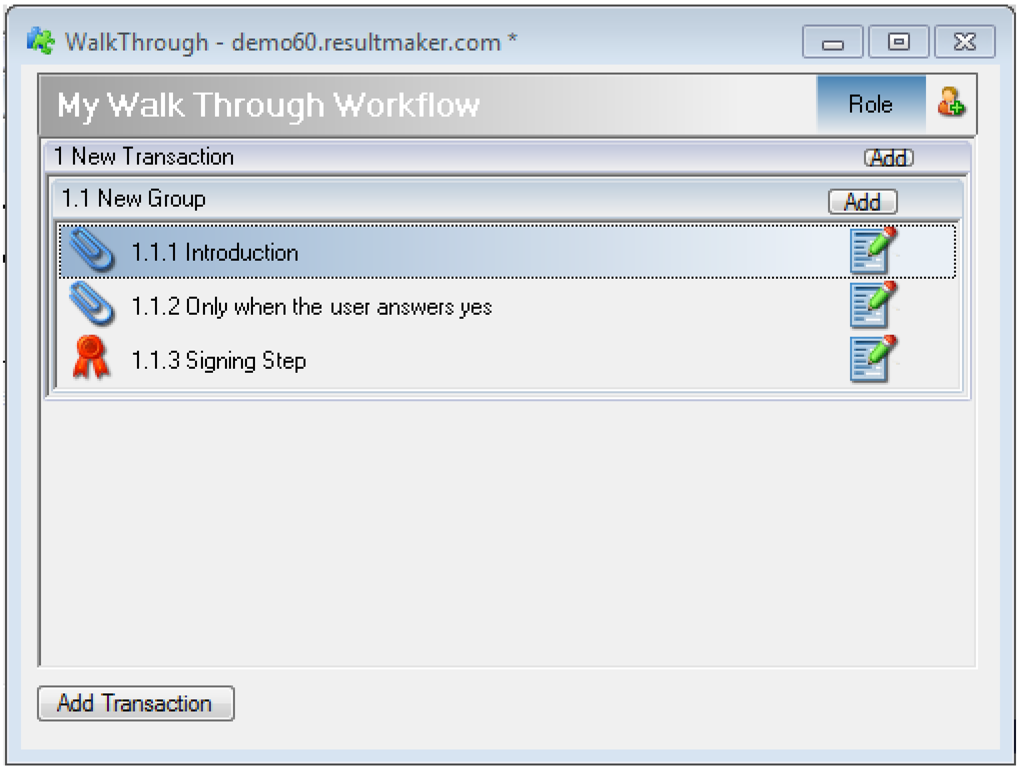
This will present the signing applet with the data and labels from the second questionnaire

Test your workflow in the browser by selecting it and hitting F5. Answer Yes to the Do you need to get an approval? – question on the Introduction activity and fill out the fields on the Only when user answers Yes activity. After pressing Continue, you will be able to see the signing applet with the data.

If you have a valid OCES certificate installed on you computer, you can digitally sign the data.

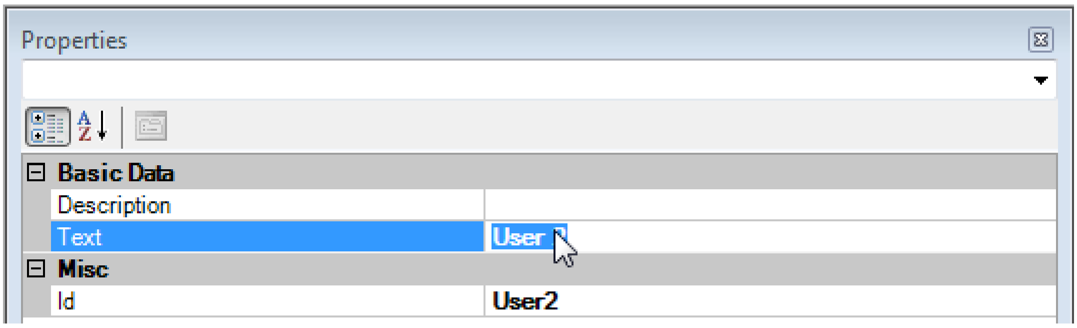
1.8 Assign user-roles til the activities

To assign more roles than the default 'Owner' click on the role-icon in the top right hand corner.



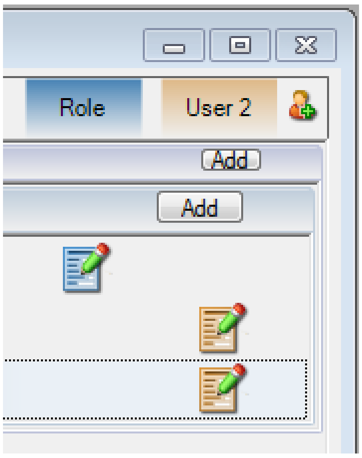
1.8.1 Change the name of a role in property window

Select the name of the role that was just added and change the name in the 'text'-field in the property window.



1.8.2 State the rights of each role on each step

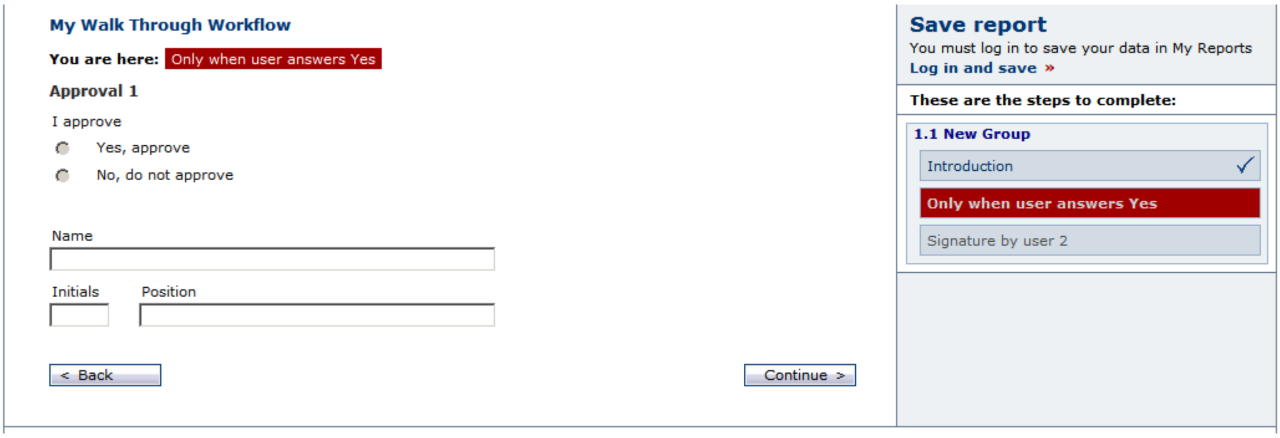
Set the first step to 'write' for 'owner'-role and step 2 plus the signing to 'write' for 'user 2'-role.



1.8.3 Preview the change in the browser

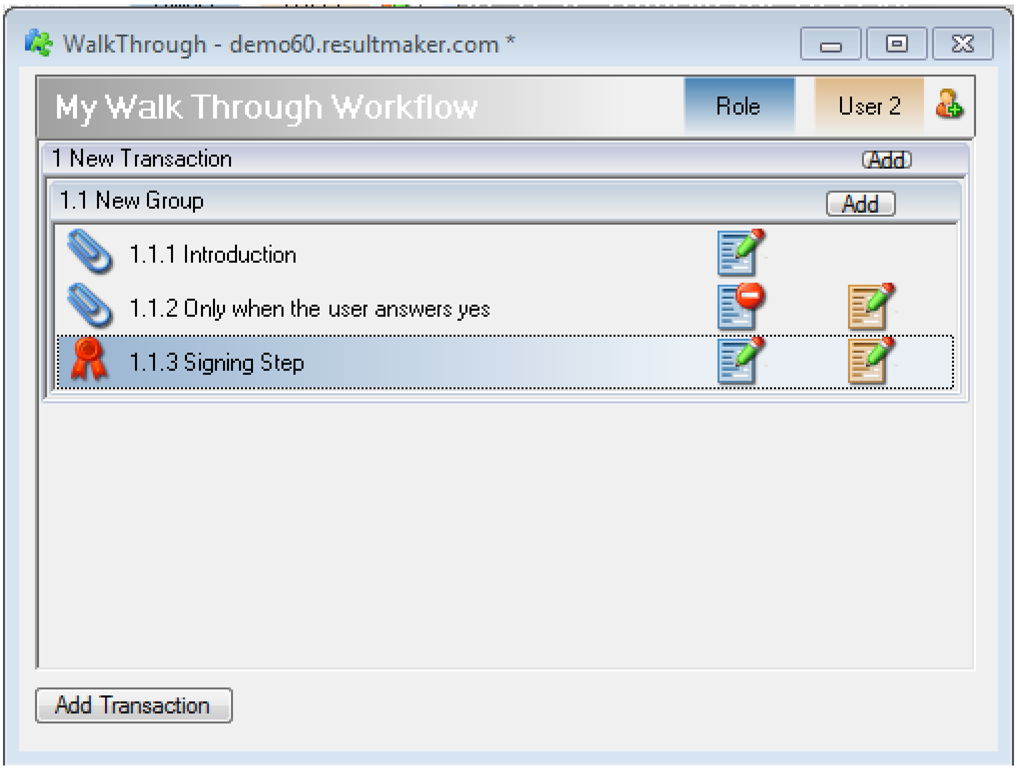
Select Yes to get to step 2. Here you can read all information, but you cannot write – try it.

In the list of steps, you will notice that the step 2 has grey text, and when you mouse over, you get an explanation: "You can view this step but not modify it"

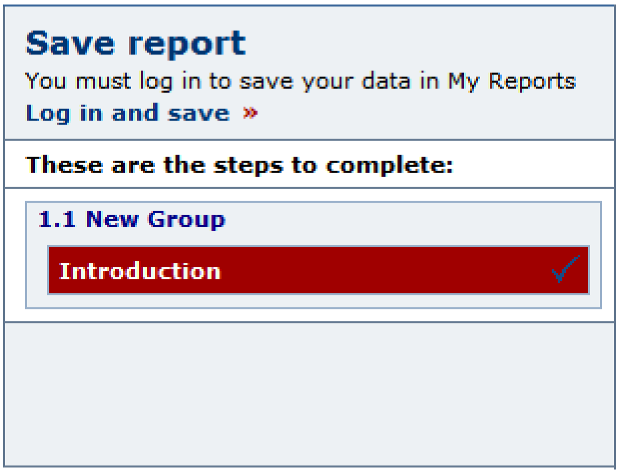


1.8.4 Hide the two approval steps from the 'owner'-role

Now lets hide these information completely to try out this feature. Click on the rights icons to hide a step to a role:



Preview the changes in the browser (F5)

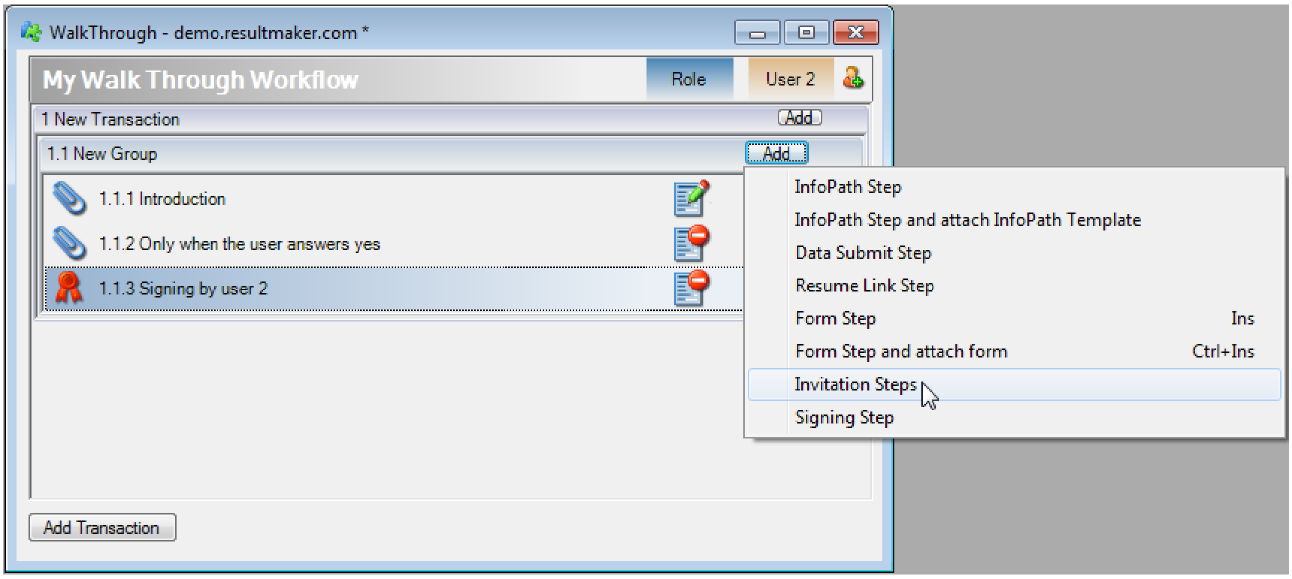


1.9 Invite user 2 into the work process

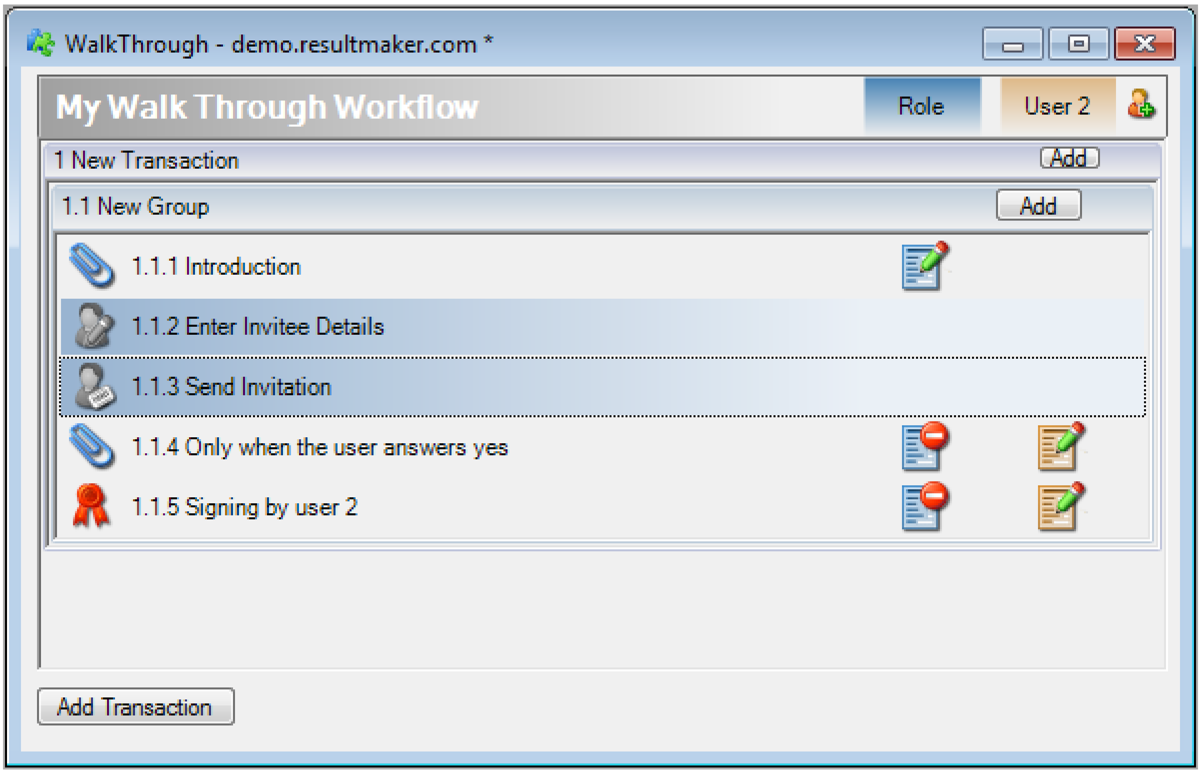
Now you only need to make it easy for user 2 to know that he/she is needed in the workprocess. This is done by inserting an 'invitation' step where this user is defined, and which sends a mail with a link to the invited person.

1.9.1 Insert an invitation step

Click on the Add-button in the right hand corner of you workflow-space and select Invitation Steps.



Two invitation steps will appear in the buttom of your list. Select them and move them upwards with the Ctrl+U keys.

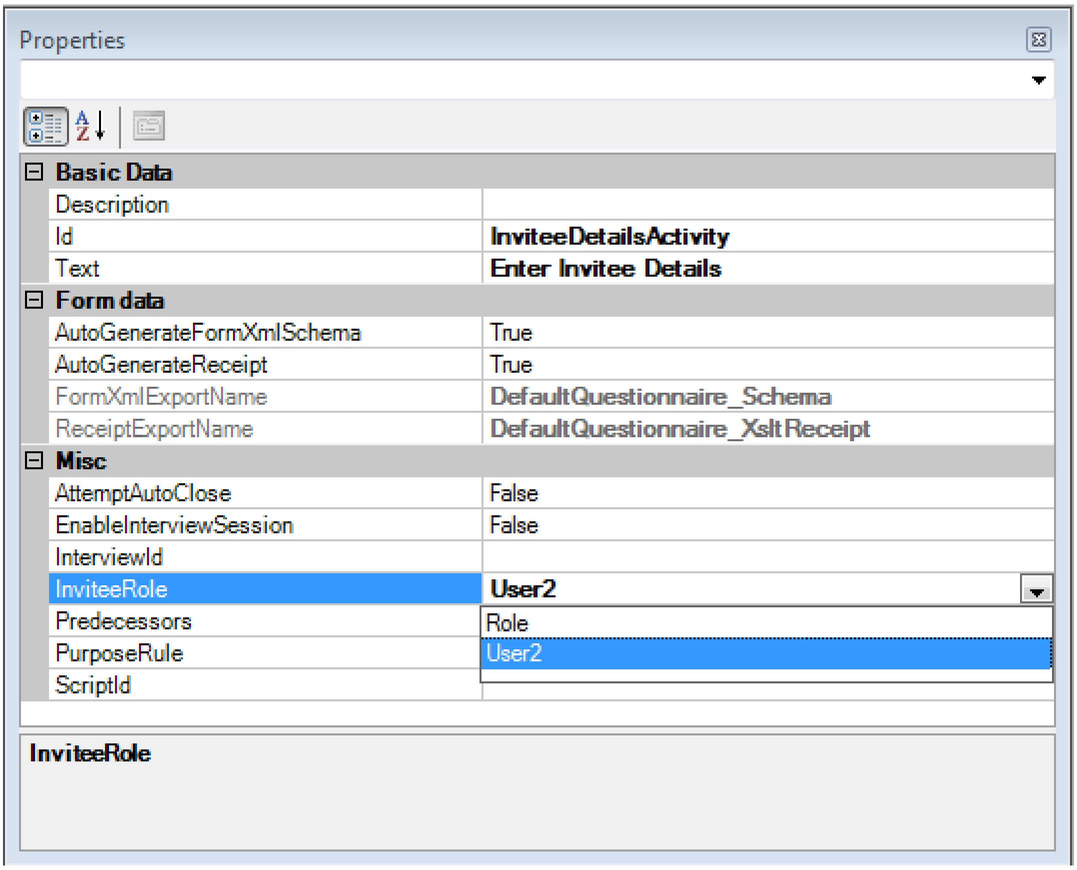


- 'Invitation Details' let the 'owner'-role type information about the user he/she needs to 'invite' into the work process.
- 'Send Invitation' sends off an email to the user defined at the invitation step

1.9.2 Set Invitation Details

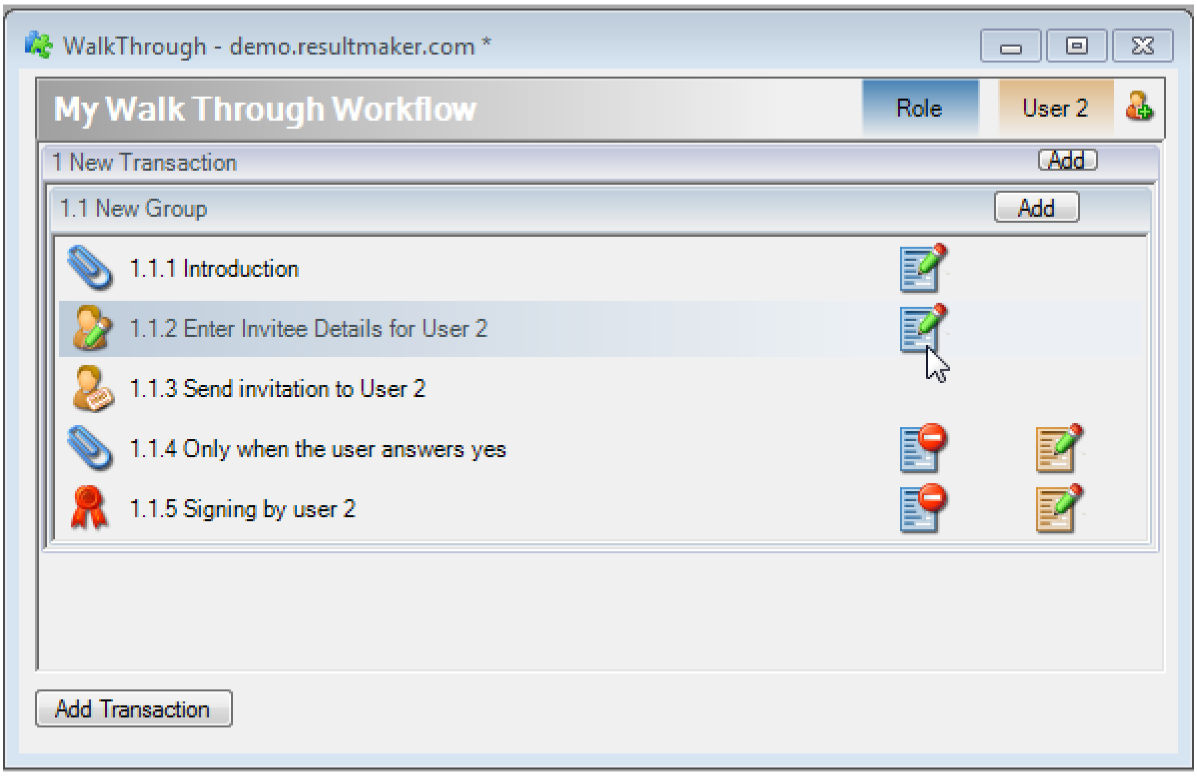
Now you will need to state who will send off the invitation (the 'owner'-role) and when (after the 'Introduction'-step is finished). You define that in the property window. Select the Enter Invitee

Details activity and set the 'InviteeRole' in the Properties to the role that is to be invited. In this case the Role is to be invited into the workflow.



Write 1.1.1 in the 'Predecessors'-field to state, that the Introduction step must be finished before typing in the details of the invitee. Also set the 'Purposes'-field to Yes, so that the invitation is only part of the workflow if the Request for approval question is answered with Yes.

And set the rights for this step to a 'Write'-activity for 'Owner'-role:



1.9.3 Preview your workflow

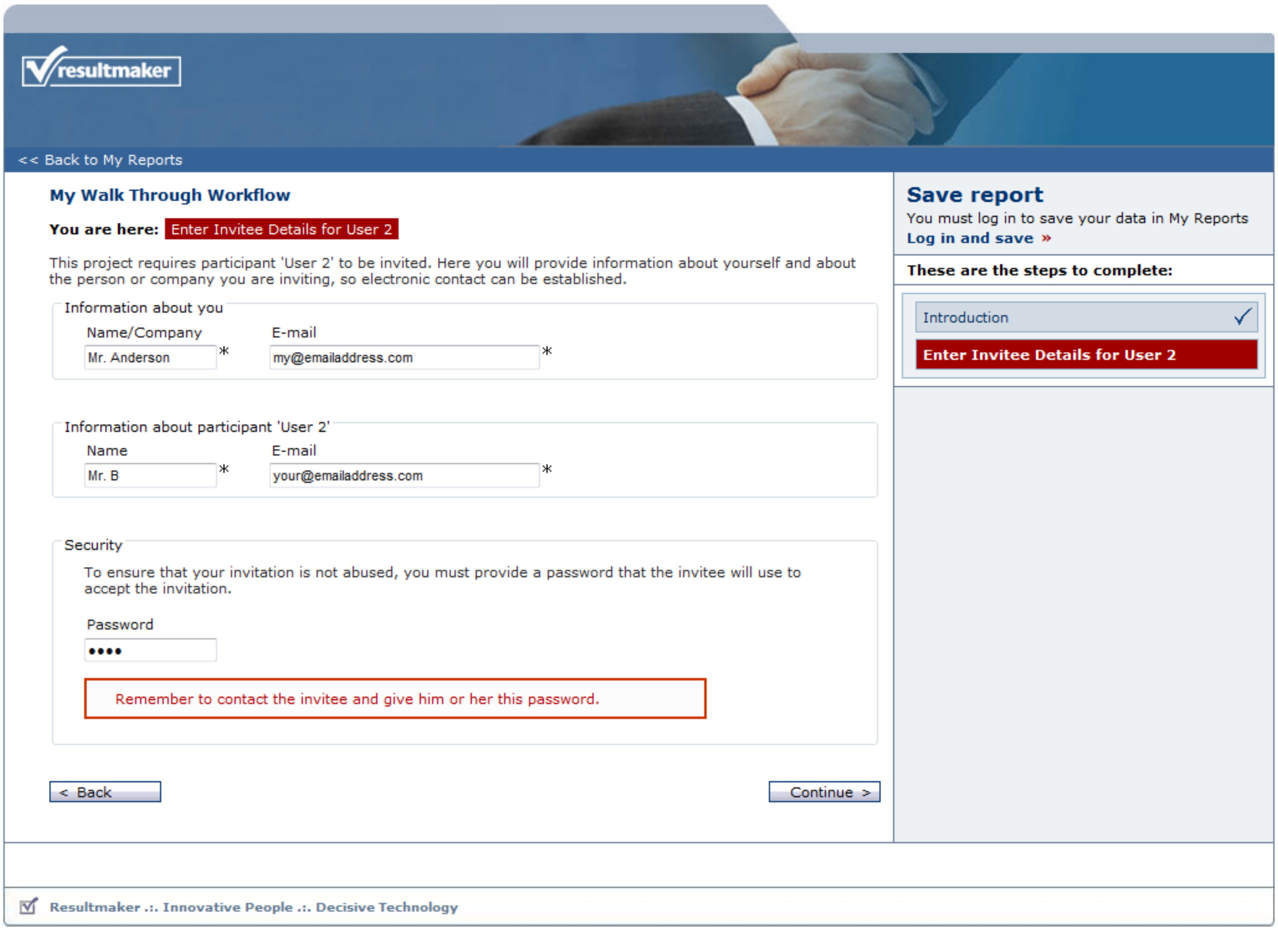
Hit F5 to preview. Now the user ('owner'-role) can access the introduction step. And if you select Yes the Invitation Step will be activated by purpose Yes. The rest of the steps are hidden to you (as you are 'owner'-role).

1.9.4 Fill in the information about the person you want to invite

2 Type in your own name and email – and the same information about the person, who is to fill in the next steps of the workflow. If you are testing alone, it is nessesary for you to make two logins on the server. Paragraph "1. Getting started with Process Design

This section describes the basic concepts of Process Design. See section 2 for more advanced topics.

Login to the server" showed you how to make a login. Make one more the same way.



When you hit Continue, an email will be send to the mail address of User 2 (Mr. B). Open your mail program and follow the instructions in the email.

Dear Mr. B

Mr. A has inititated the report 'My Walk Through 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.

Mr. A 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 Mr. A has not yet given you the password, you can contact him or her at your@emailadress.com.

The registration is not valid without your approval.

My Walk Through Workflow

Click on the link above. When the report has been completed, the approved information will be sent to the intended receiver. Mr. A 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 Mr. A and ask him or her to send you a printed copy of the report by mail. You can contact Mr. A at your@emailadress.com.

2.1 Follow the link to get to the 'Role 2'-steps of the workflows

When you have logged in (as a different person than before, you can make as many user accounts as you like), you will be asked for a password. Fill in the password you wrote in the invitation form.

You are logged in to the portal.

Enter the password related to the form you were asked to contribute to.
Note: This is a different password than the one you use when you log in to the portal!

Click on "OK" to go to the part of the form you need to look at.

Password

•••• OK

Where can I find the password?

You will be sent directly to the approval-step for Role 2 ('Only when the user answers Yes').

You can se the two former steps, which are now checked with a ✓ (this means that they are completed). You can browse the steps to see the information given by the 'Owner'-role.

Fill in the information and hit Continue to get to the Signing-step. Sign the form and hit Ok to finish.

There is more about invitation step in the "Advanced Process Design" section of this document.

2.2 You are ready to work with more complex processes

You have now been through the getting started guide and have learned the basic concepts of Resultmaker Process Platform. Now you can start experimenting on your own and continue in section "3 Advanced Process Design". You are welcome to use the server and all the content you find there.

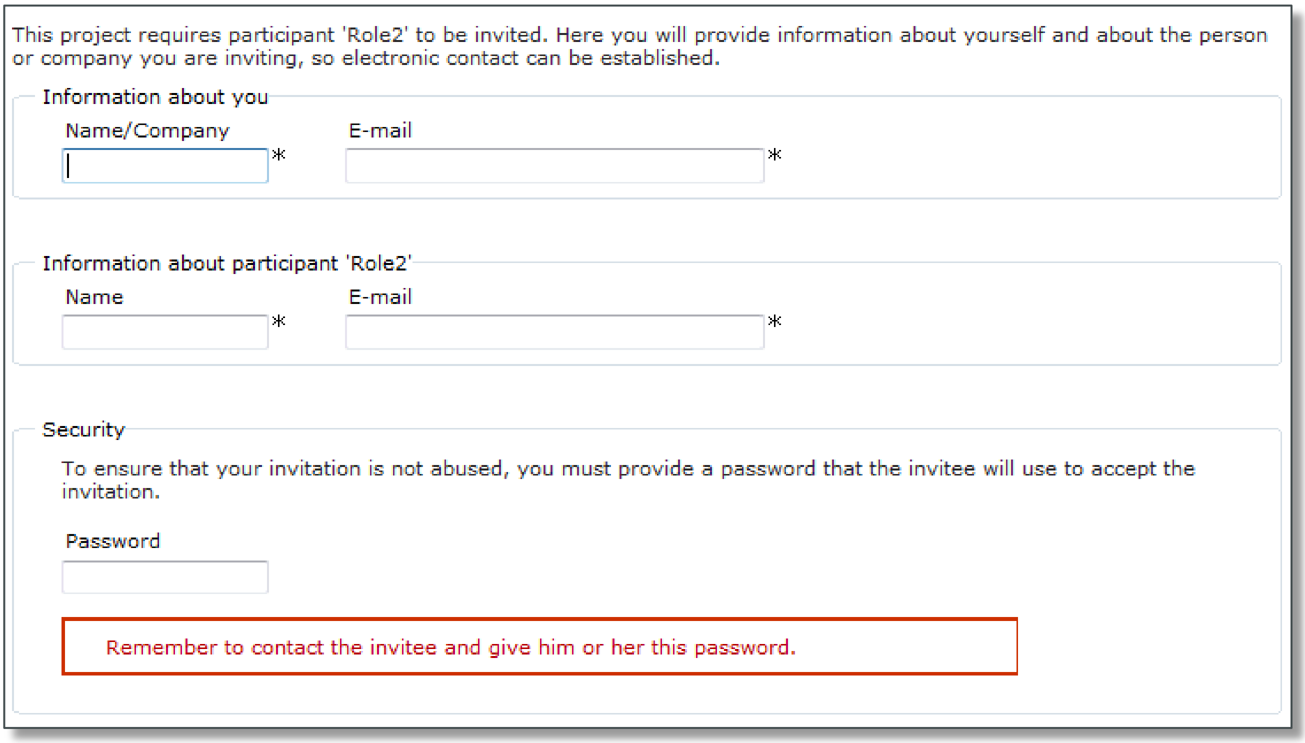
Enjoy!

3 Advanced Process Design

This section describes the more advanced aspects of Process Design.

3.1 Changing the language of the invitation form

Did you ever wonder about how to change the language of the invitation page of the “Invitation Step” functionality described in section “1.9 Invite user 2 into the work process”? By default this invitation page is in English as seen in Figure 1.


This project requires participant 'Role2' 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

Name/Company * E-mail *

Information about participant 'Role2'

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.

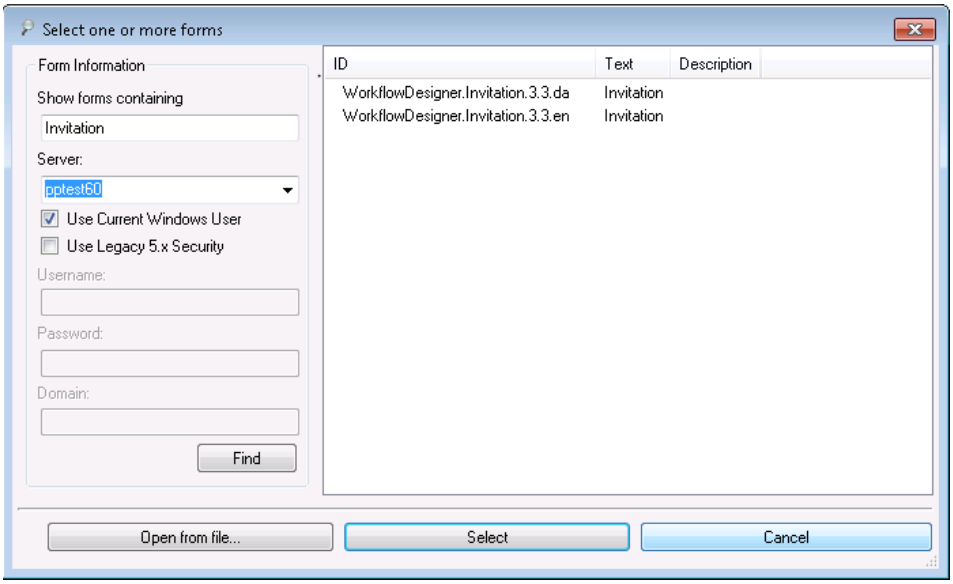
Password

Remember to contact the invitee and give him or her this password.

Figure 1 Standard invitation page in English

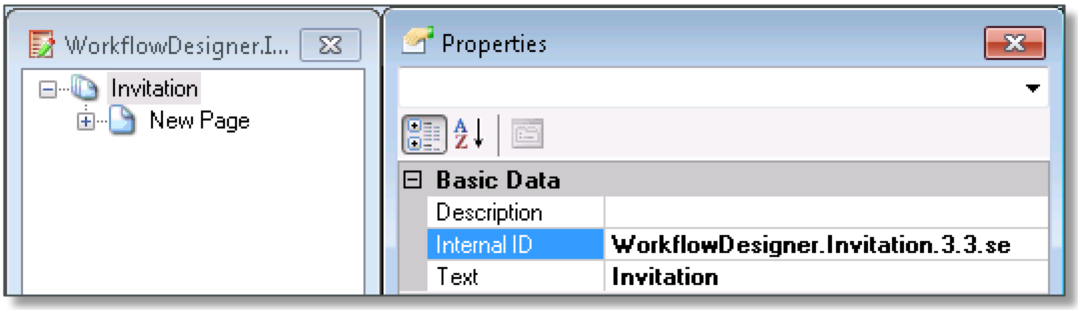
Fortunately the invitation page is implemented as a normal form. By default the invitation activity references a form with the name “WorkflowDesigner.Invitation.3.3.en”. In order to change this to another language do the following.

1. Open the invitation form. File, Open, Form.
2. Search for “Invitation”.

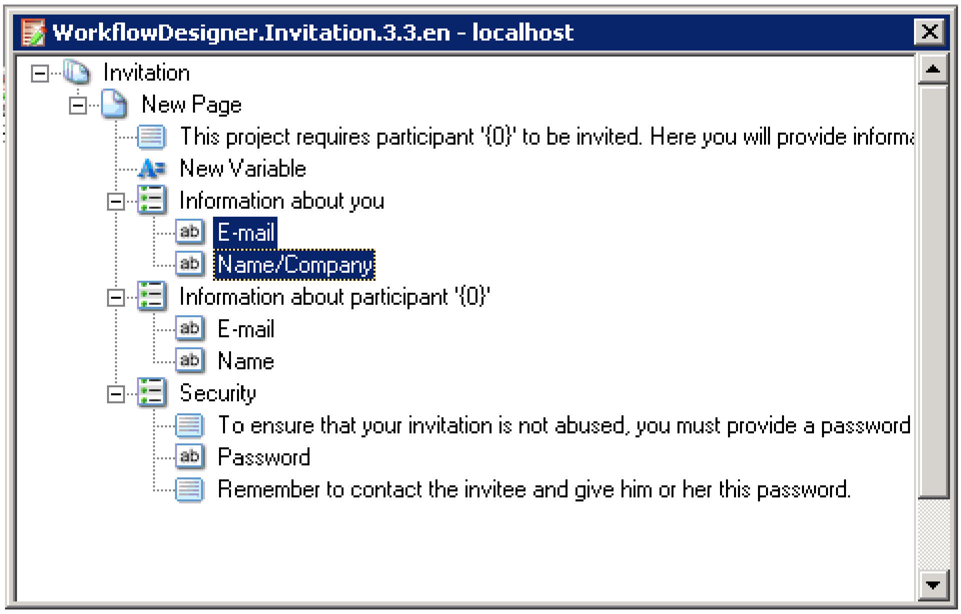


a.

3. Select the form with the name “WorkflowDesigner.Invitation.3.3.en”
   a. If a form exists in the required language (can be seen on the last letters “.en”) go to step 6.
4. Click the “Select” button.
5. Change the Internal ID of the form to match you language i.e. “WorkflowDesigner.Invitation.3.3.se” and save it.
   a. Select the root level of the form page
   b. Go to the property grid and select the “Internal ID”p property
   c. Change the last to letters to match your language

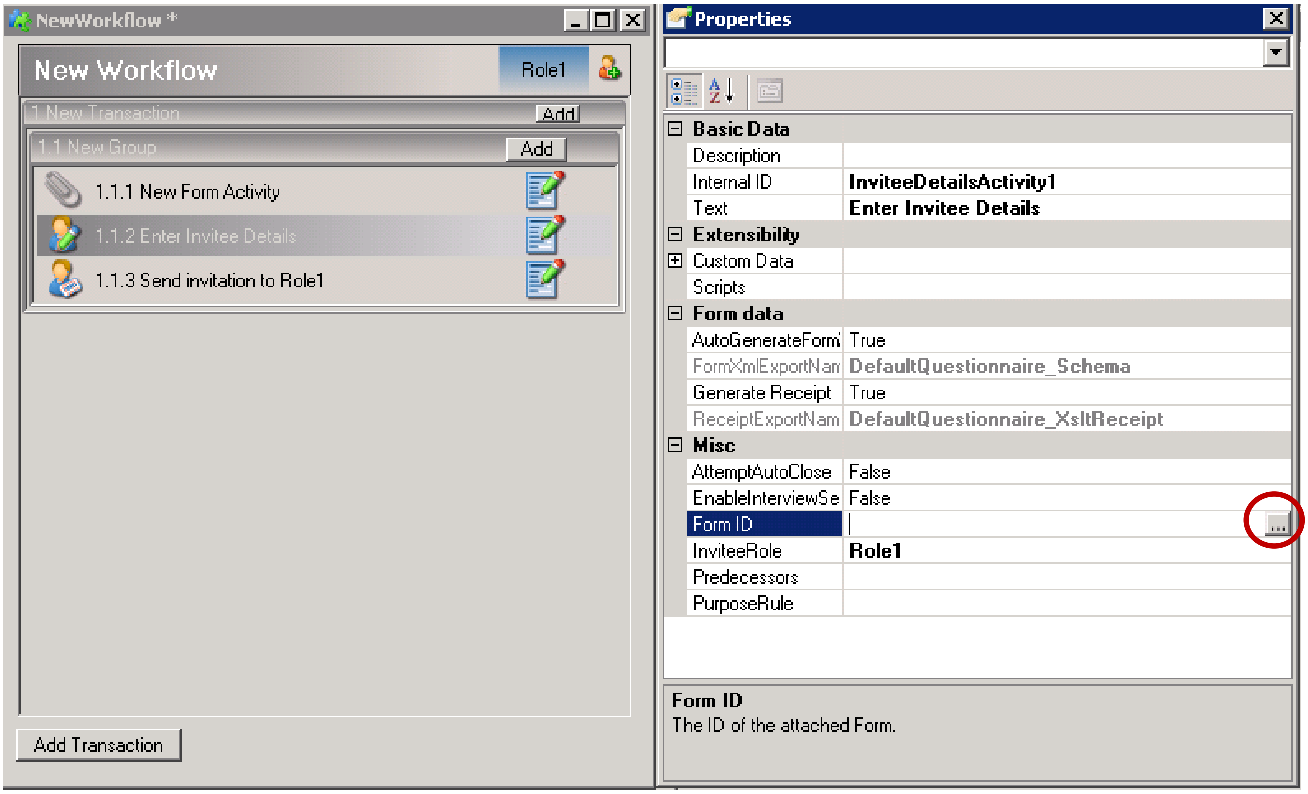


   d. Choose File and Save
6. Now modify the form element texts to your preferred language.
   a. Do not change any substitution tags, which have the format: {0}.
   b. Also do not delete any of the input fields for email address, name and password

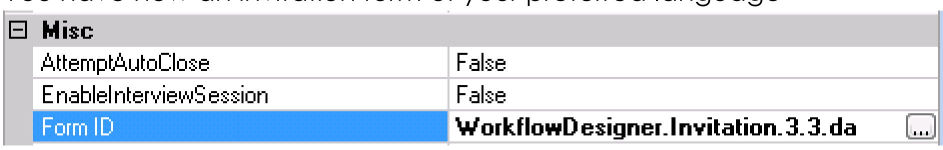


c. You can change the Text property of the input fields, but not the other properties.
d. Choose File and Save

7. Now go to the workflow
8. Select the "Enter Invitee Details" step
9. Go to the "Form ID" property in the "Misc" section and select the ellipsis icon

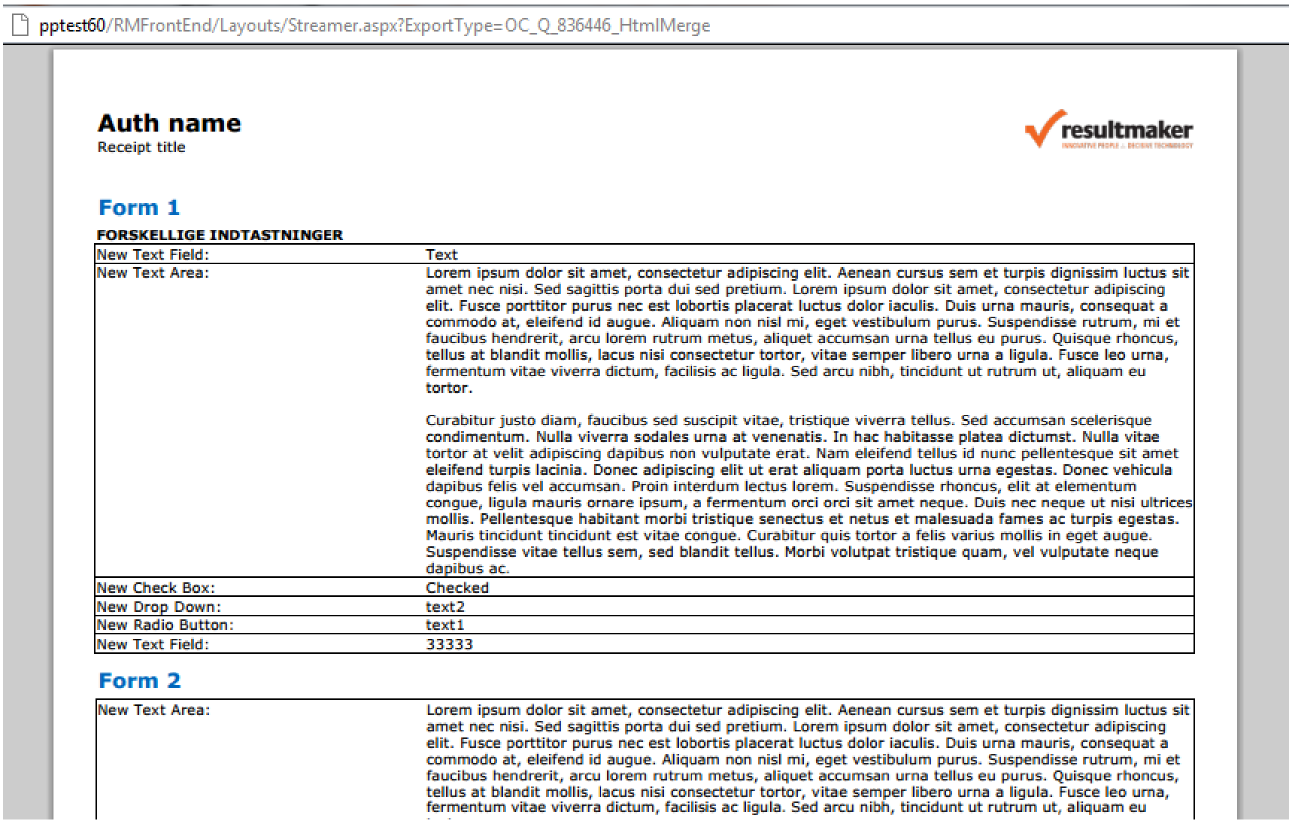


10. Search for the form you have just saved or identified, click on the form and press Select.
11. You have now an invitation form of your preferred language



3.2 Presenting receipts to the users

The Process Platform is able to generate receipt documents out of the box, that looks similar to the one seen in Figure 1.



pptest60/RMFrontEnd/Layouts/Streamer.aspx?ExportType=OC_Q_836446_HtmlMerge

Auth name

Receipt title

Form 1

FORSKELLIGE INDTASTNINGER

New Text Field:	Text
New Text Area:	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean cursus sem et turpis dignissim luctus sit amet nec nisi. Sed sagittis porta dui sed pretium. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Fusce porttitor purus nec est lobortis placerat luctus dolor iaculis. Duis urna mauris, consequat a commodo at, eleifend id augue. Aliquam non nisl mi, eget vestibulum purus. Suspendisse rutrum, mi et faucibus hendrerit, arcu lorem rutrum metus, aliquet accumsan urna tellus eu purus. Quisque rhoncus, tellus at blandit mollis, lacus nisi consectetur tortor, vitae semper libero urna a ligula. Fusce leo urna, fermentum vitae viverra dictum, facilisis ac ligula. Sed arcu nibh, tincidunt ut rutrum ut, aliquam eu tortor. Curabitur justo diam, faucibus sed suscipit vitae, tristique viverra tellus. Sed accumsan scelerisque condimentum. Nulla viverra sodales urna at venenatis. In hac habitasse platea dictumst. Nulla vitae tortor at velit adipiscing dapibus non vulputate erat. Nam eleifend tellus id nunc pellentesque sit amet eleifend turpis lacinia. Donec adipiscing elit ut erat aliquam porta luctus urna egestas. Donec vehicula dapibus felis vel accumsan. Proin interdum lectus lorem. Suspendisse rhoncus, elit at elementum congue, ligula mauris ornare ipsum, a fermentum orci orci sit amet neque. Duis nec neque ut nisi ultrices mollis. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Mauris tincidunt tincidunt est vitae congue. Curabitur quis tortor a felis varius mollis in eget augue. Suspendisse vitae tellus sem, sed blandit tellus. Morbi volutpat tristique quam, vel vulputate neque dapibus ac.
New Check Box:	Checked
New Drop Down:	text2
New Radio Button:	text1
New Text Field:	33333

Form 2

New Text Area:	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean cursus sem et turpis dignissim luctus sit amet nec nisi. Sed sagittis porta dui sed pretium. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Fusce porttitor purus nec est lobortis placerat luctus dolor iaculis. Duis urna mauris, consequat a commodo at, eleifend id augue. Aliquam non nisl mi, eget vestibulum purus. Suspendisse rutrum, mi et faucibus hendrerit, arcu lorem rutrum metus, aliquet accumsan urna tellus eu purus. Quisque rhoncus, tellus at blandit mollis, lacus nisi consectetur tortor, vitae semper libero urna a ligula. Fusce leo urna, fermentum vitae viverra dictum, facilisis ac ligula. Sed arcu nibh, tincidunt ut rutrum ut, aliquam eu

Figure 2 Html Receipt

This section describes how to setup these printable receipts, using the Process Designer.

3.2.1 Html Merge Receipt

When creating a HTML based receipt the Signing or Data Submit activity steps are used to control the configuration of the receipt.

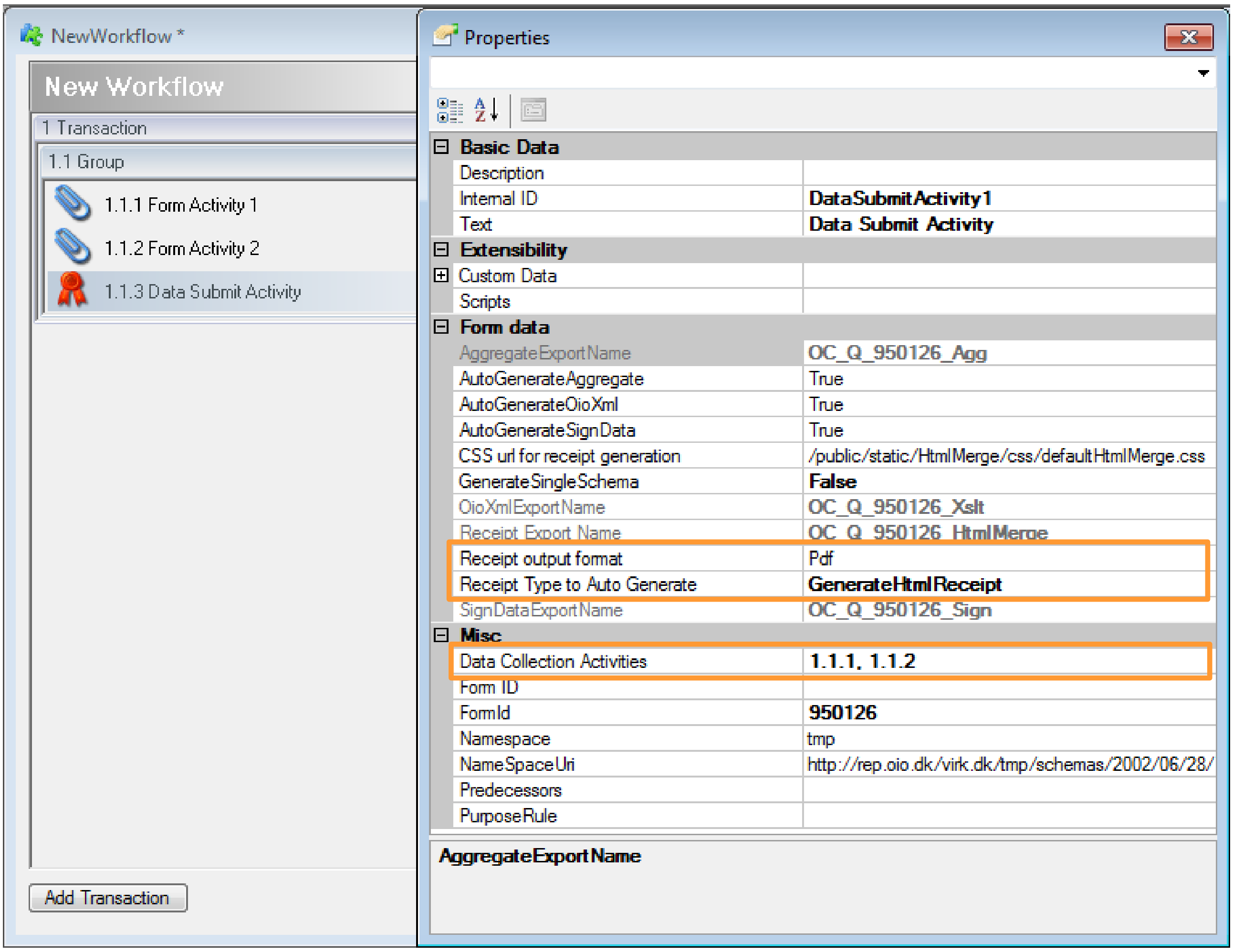


Figure 3 Configuring the Data Submit (or Signing) activity

Figure 3 shows a workflow with two form activities and a Data Submit activity. In the "Data Collection Activities" property on the "Data Submit Activity" it is possible to reference the activities from which data is to be collected for the receipt generation, in the shown example from the activities with the numbers 1.1.1 and 1.1.2.

The field "Receipt Type to Auto Generate" should be se to "GenerateHtmlReceipt", which specifies the type of receipt to generate, in this case the new HTML Merge type.

The "Receipt output format" can either be Pdf or Html, chosing either will generate a receipt in the corresponding format.

The Html Merge receipts are based on the css specified in the "CSS url for receipt generation" field. The CSS has to be publicly accessible on the server.

Each of the form activities referenced in the "Data Collection Activities" has to have the "Generate Receipt" property set to "GenerateHtmlReceipt", see Figure 4.

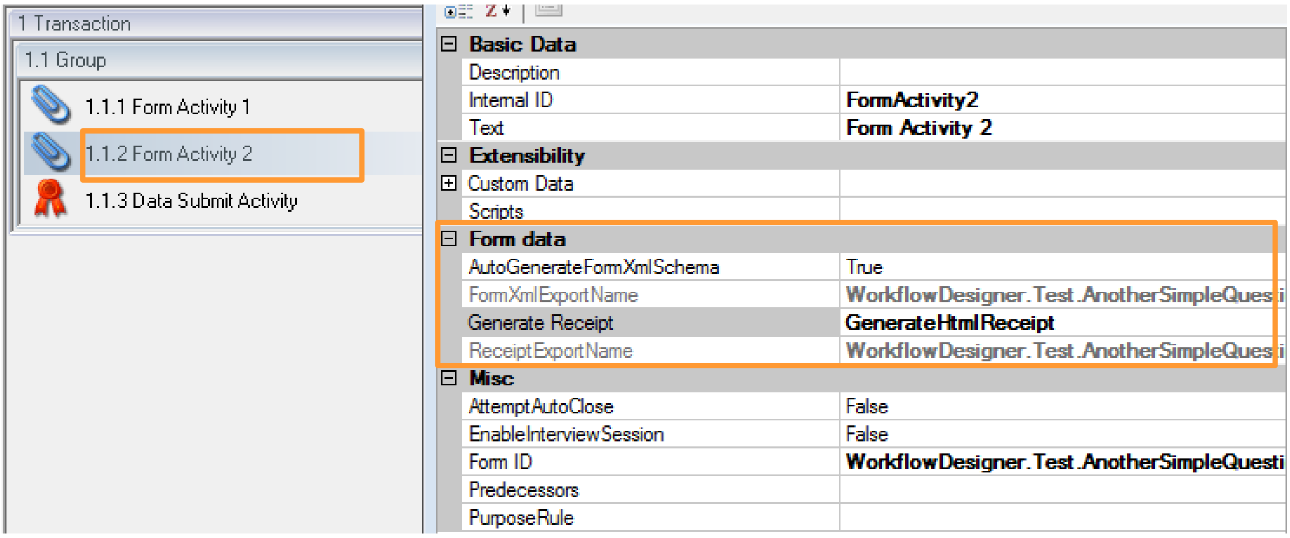


Figure 4 Configuring the form activity form Html Merge

When executing the workflow at run-time in the browser, the receipt is available on the "Data Submit Activity" by pressing "Show Data".

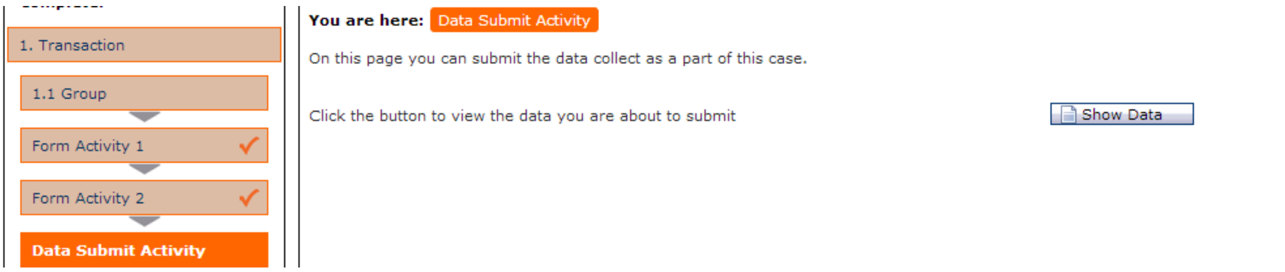


Figure 5 Opening a receipt on a Data Submit Activity

The receipt will open in a new window and looks like the one presented in Figure 6.

This is an example of a receipt

Data Submit Activity

resultmaker

A simple questionnaire that asks information about a person

Name:	John Doe
Married:	Checked
Sex:	Male
Age group:	0-20
Resume:	Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Maecenas porttitor congue massa. Fusce posuere, magna sed pulvinar ultricies, purus lectus malesuada libero, sit amet commodo magna eros quis urna. Nunc viverra imperdiet enim. Fusce est. Vivamus a tellus. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Proin pharetra nonummy pede. Mauris et orci.

Another simple questionnaire that asks information about a person

PERSON INFORMATION

Do you own a car?:	Yes
What brand is your car?:	VW

Figure 6 Receipt example

The receipt contains a header that holds the value from the "Description" and "Text" properties from the Data Submit activity. It also shows the logo placed in a location deducted from the namespace property of the Data Submit activity. The logo for the namespace with the "tmp" prefix is located at the following link: "/public/static/HtmlMerge/Logo/tmp_HtmlMerge_logo.png". The folder is located in the file repository on the server, c:\FileRepository\.

After the header the contents of the data collection activities is presented. Each activity is presented with the name of the form as a heading and then the elements from the page are listed with their name and the value that the user typed in.

Finally a footer is added. The footer consists of the title and the internal name of the workflow as well as a TransactionId and page numbering.

HTML MERGE RECEIPT SAMPLE   TYPE: HTMLMERGERECEIPTSAMPLE   TRANSACTION ID: F497E98B-F14D-4847-B415-E95FCA9D59E7

1 / 1

Figure 7 Receipt footer example

Resultmaker .:. Innovative People .:. Decisive Technology

Resultmaker is a Danish company specialized in the development of intelligent software for improving mission critical business processes across humans and systems
– the essence of running and developing the business of our customers.

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