User Manual for Process Design in Resultmaker Process Platform™

Document version: 6.2

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RESULTMAKER

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*.

If you are looking for design of forms visit the '*User Manual for Form Design in Resultmaker Process Platform™*' on https://partner.resultmaker.com.

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 version is: Resultmaker Process Platform 6.2 R8

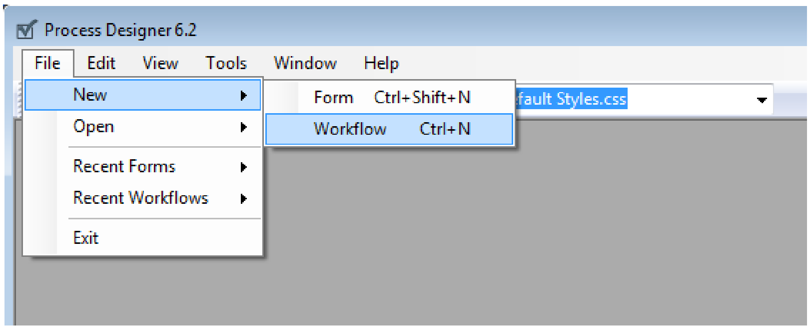
Contents

1 Getting started with Process Design

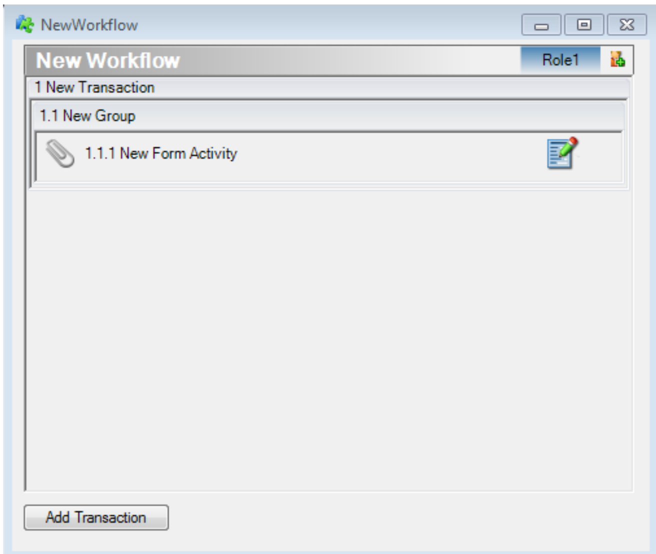
This section describes the basic concepts of Process Design. See section 2 for more advanced topics.

1.1 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.



The workflow will look like this when it is created:

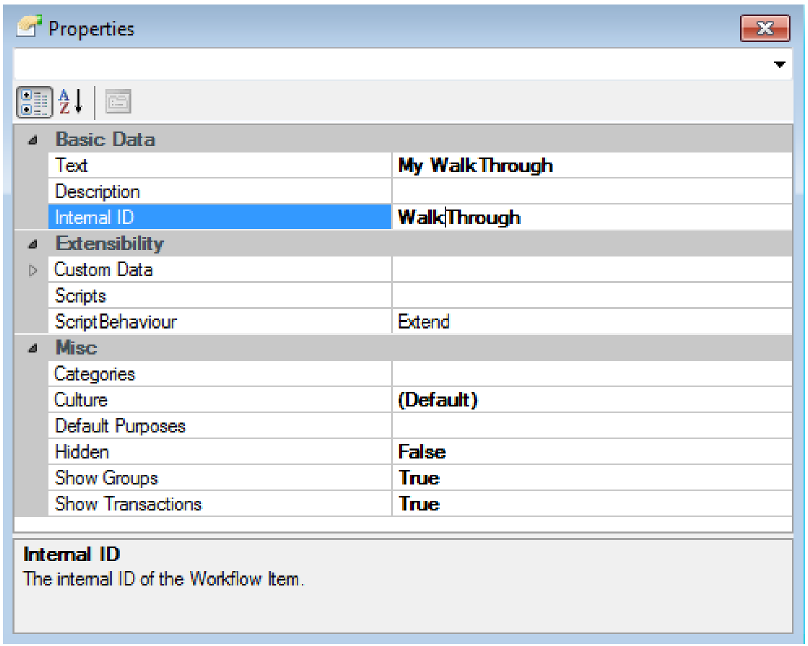


Start off by naming your workflow and select the server you want to save it to. This gives you the option of using the preview function from the very beginning.

1.1.1 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.

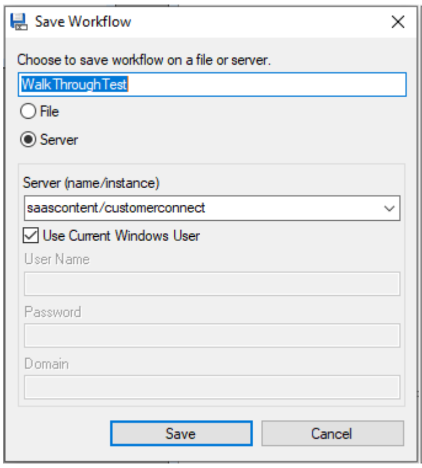
Now select the workflow level (click on "New Workflow). This gives you the properties for the workflow level.

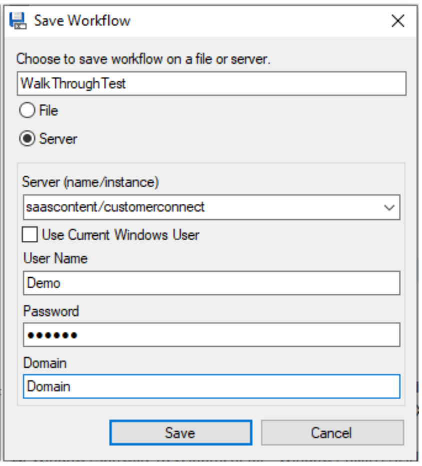


In the Properties Window you write the Id and the name for your workflow. The Internal ID must be without spaces and in 'ordinary' characters – this is the system's reference to your workflow, and this is also the name you need to use, when you search your workflow on the server. Write the name in the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

The bottom part of the Property window has a small description of the currently selected property. In the cases above the Property window TIP describes the Internal ID Property.

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





As seen in the figures above there are two main ways to save to the server, selected in the 'Use Current Windows User' check box.

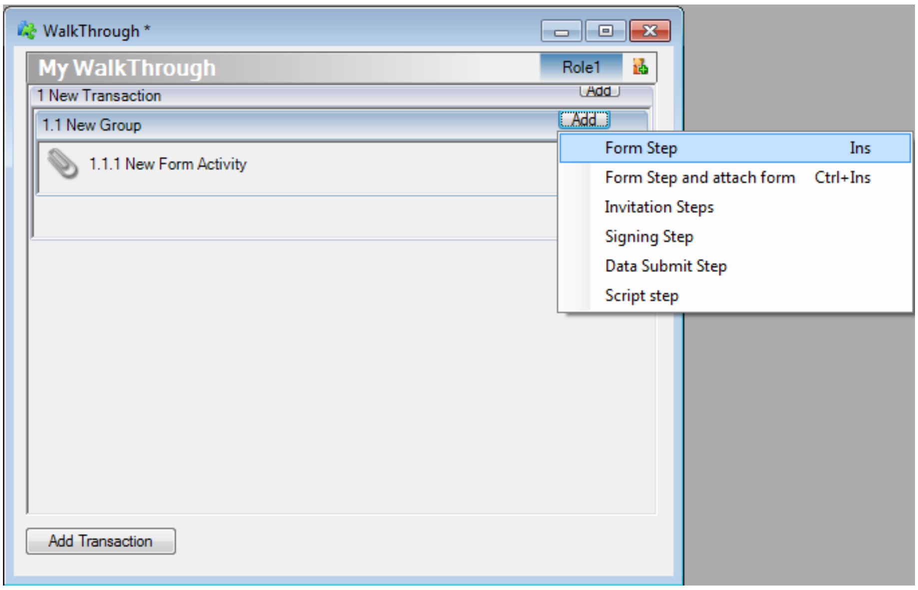
1. When 'Use Current Windows User' is selected it saves the workflow to the server based on the user logged in on the computer.

2. When 'Use Current Windows User' is un-selected it is possible to save as a different user than the one logged in on the machine or on another server. The User Name, Password and Domain fields are now visible, requiring the user to log in.

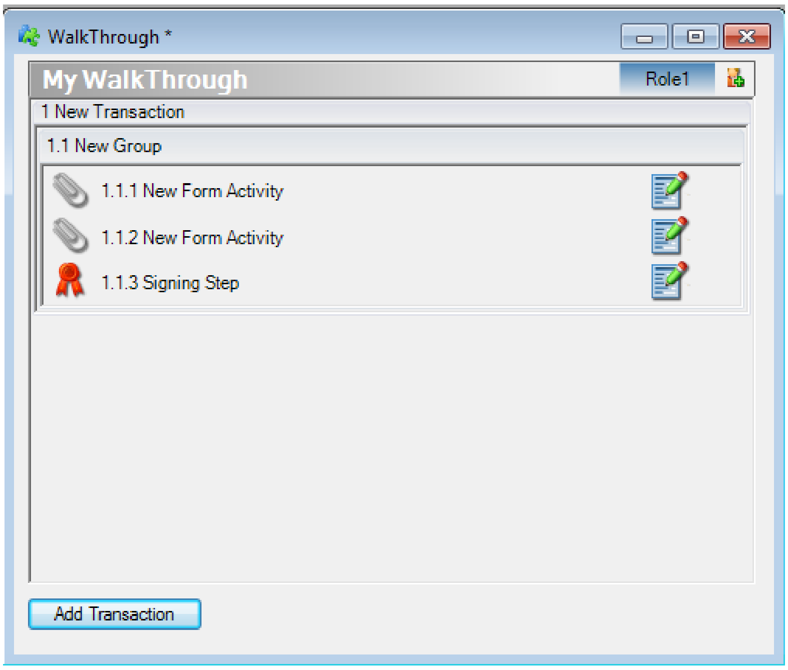
The property "Server (name/instance)" indicates that it is possible to target either a server, by specifying a server name like "saascontent" or a scecific instance on the server by specifying a name like "saacontent/customerconnect". In the first case the "default" instance on the server "saascontent" is targeted. In the latter case the instance "customerconnect" on the server "saascontent" is targeted.

1.2 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.

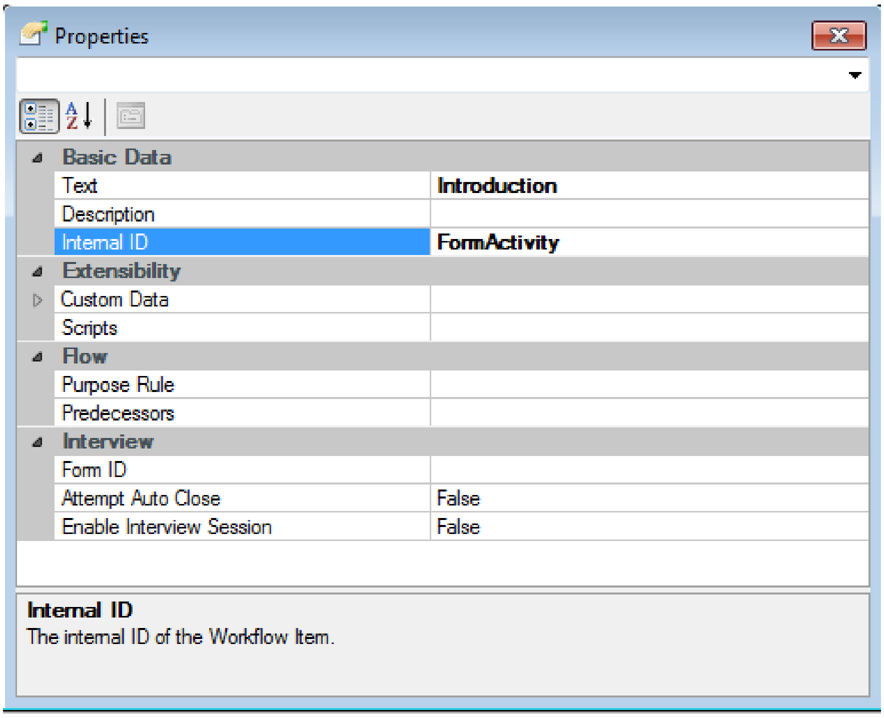


Make a workflow with two Form Steps and one Signing Step



1.2.1 Name the steps like you named your workflow.

Name each step in the Properties Window (F4)



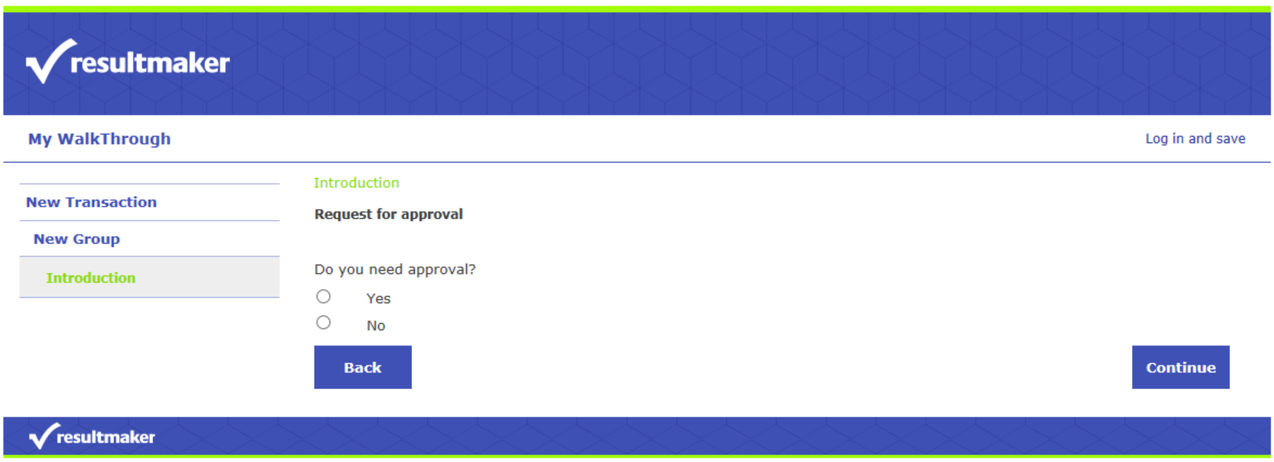
Name your Steps so they correspond with this guide:

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

1.2.2 Preview your workflow

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

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

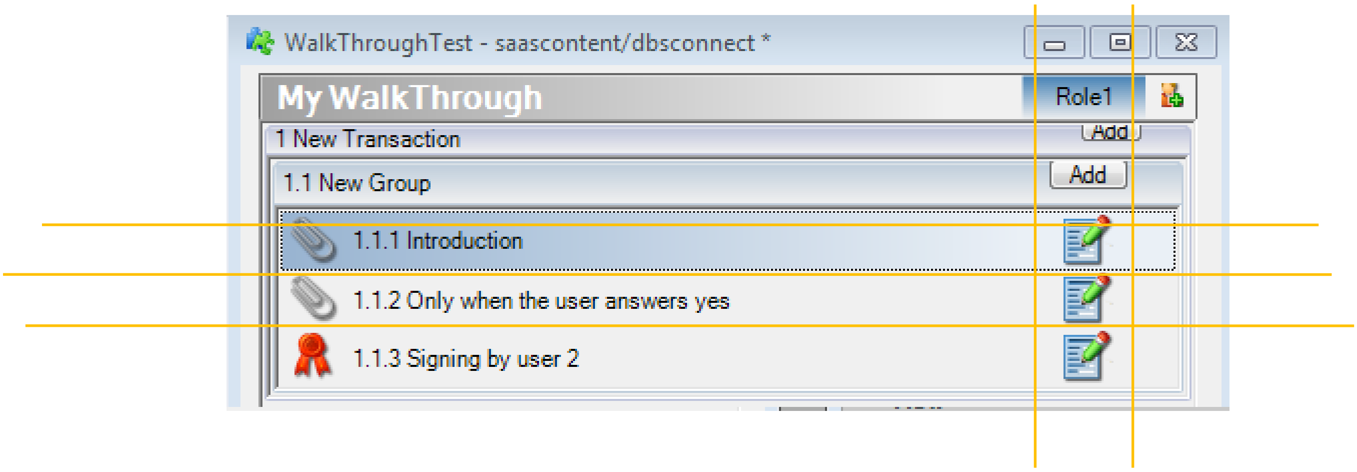


To the left you see a list of your three steps

1.3 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 'write'-activity by the 'Role1'-role. This is indicated by small icons. The activities/steps are associated to use roles. 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 'hidden'-activity and once more to change it to a 'read'-activity. The 'read'-activity only shows when you hoover the mouse over the area.

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

1.4 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. 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'. Depending on the server it is not always necessary to fill username and password, but just use 'use current windows user'

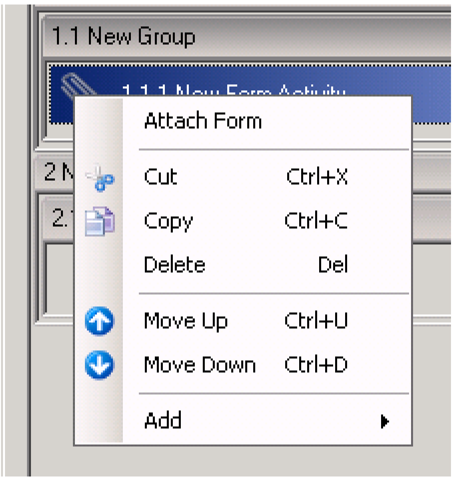
1.4.1 Attach forms

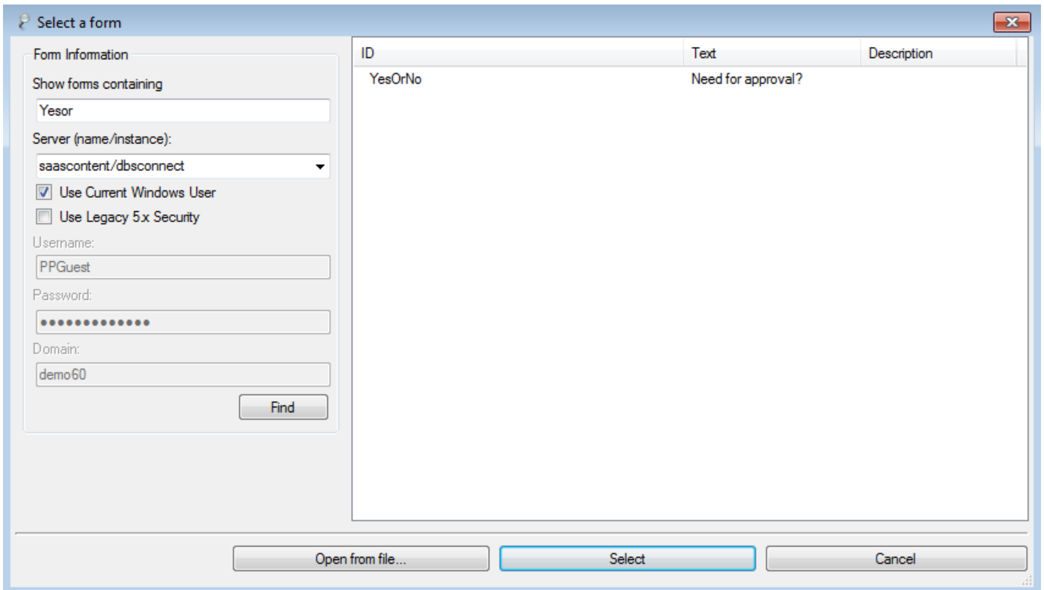
Please attach the following forms to your two form steps, to follow this guide:

Step 1 ⇨ YesOrNo

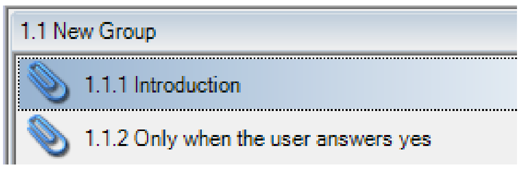
Step 2 ⇨ Approval1

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.

1.5 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:

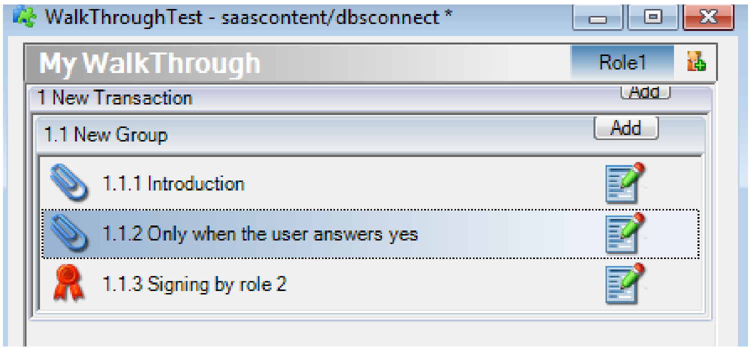
1. On the form step that is affected by the purpose (the approval step)
2. Inside the form, where you want the purpose to be activated (on the yes-answer)

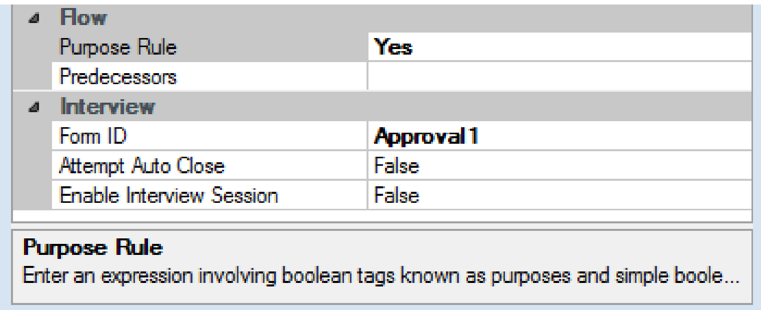
1.5.1 State a purpose rule for a step

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 'Purpose Rule'. Write 'Yes' in the field

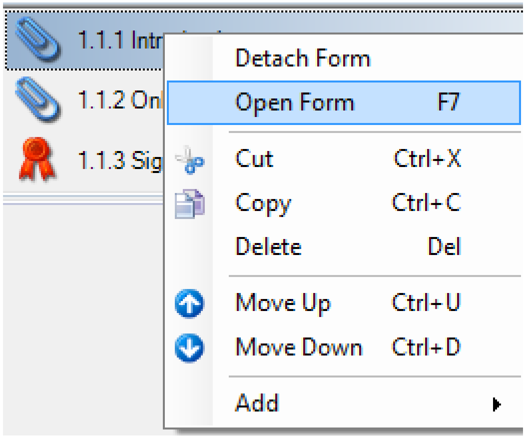




1.5.2 Set purpose inside a form

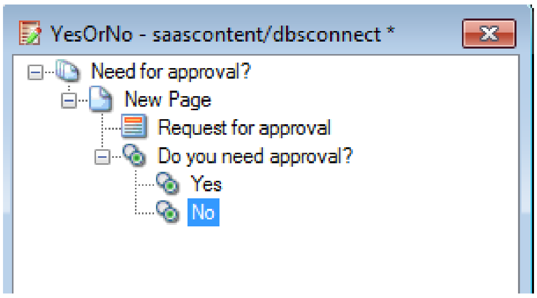
In this example we want the purpose to be set if the user chooses 'Yes' on the 'Introduction'-step. We will set this purpose inside the form

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

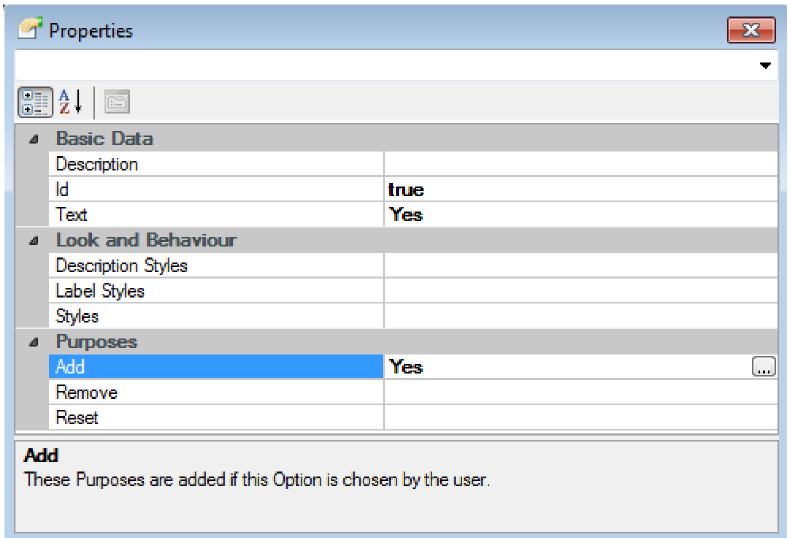


1.5.3 State how the conditions should be set inside the form

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

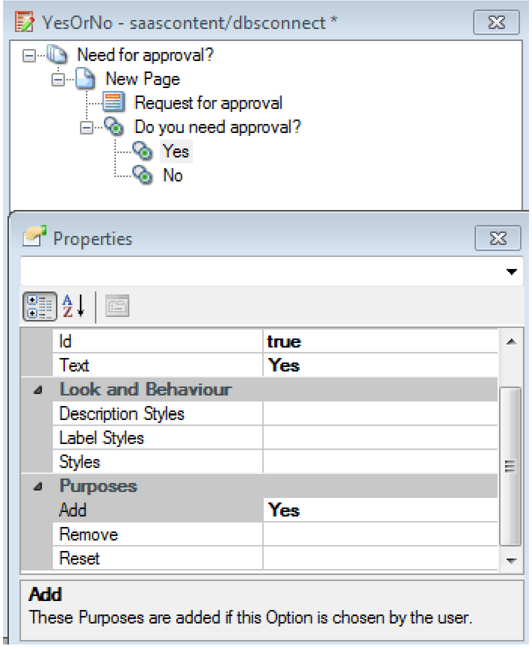


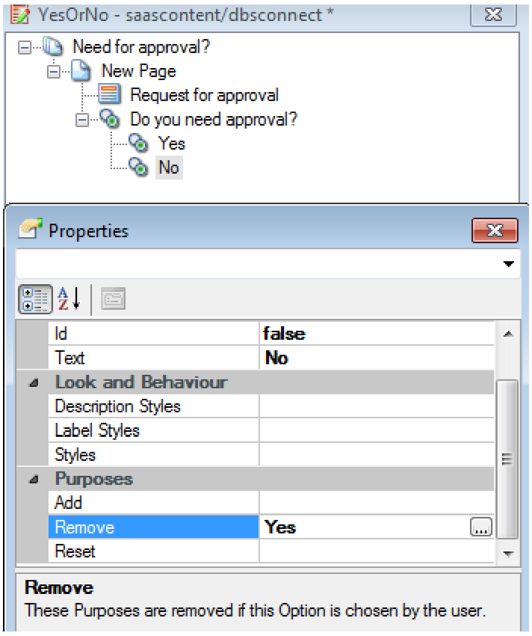
Set the purpose in the properties for the yes option of the radio button by selecting the yes-answer, and state the purpose in the property window (hit F4 if your property window is closed). This is done in the 'Purpose'-section next to 'Add'.



1.5.4 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 or by pressing ctrl + s.

If the form has a * after the name, there are unsaved changes.

1.5.5 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.

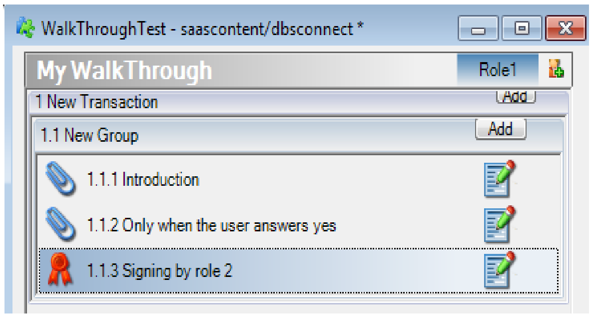
Click back on the 'introduction'-step and change your choice to No – and watch step two disappear.

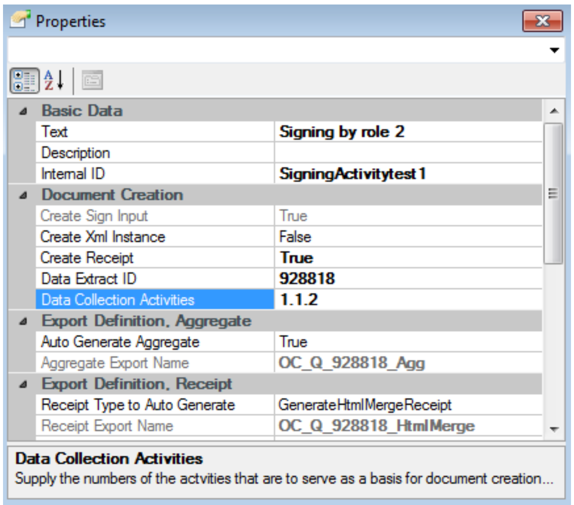
Now you only need to tell the signing step what informations you want it to be depended on.

1.6 Set the signing information

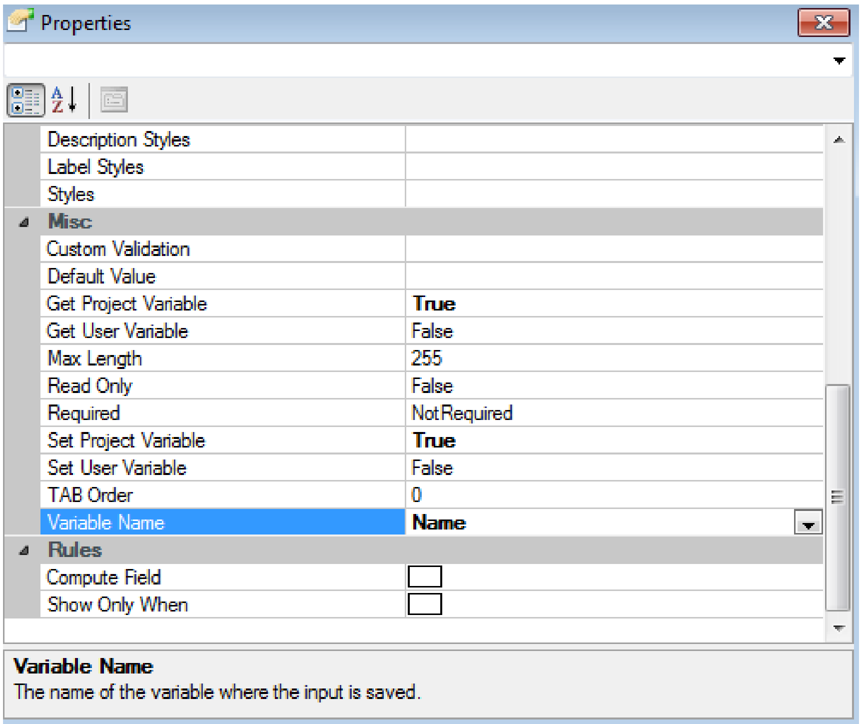
In this case you want the end user to sign the data typed in in the second questionnaire.

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. It is also possible to control the signing step with purpose rules as seen above on ordinary forms. Simply add the purpose to the Purpose rule in the signing form in the properties window.





This will present the signing applet with the data and labels from the second questionnaire. It is necessary to add variable names to the elements you want to show. The headres is always shown, but the other elements needs a unique name.

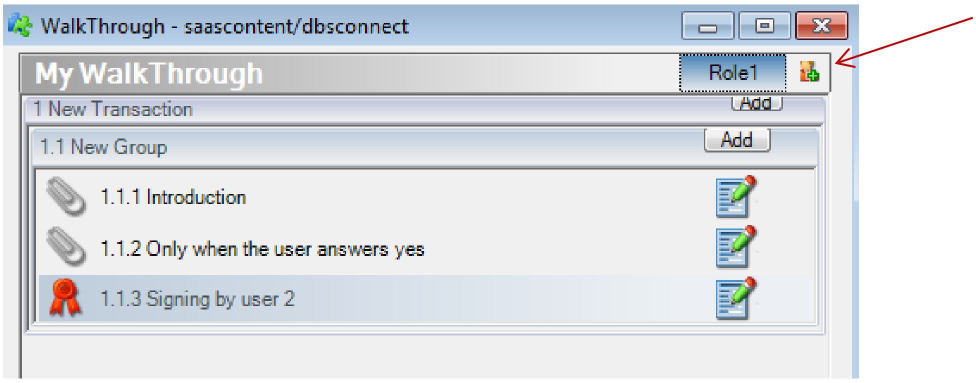


Test your workflow in the browser by selecting it and hitting F5. Answer Yes to the Do you need to get an approval? – question on the Introduction activity and fill out the fields on the Only when user answers Yes activity. After pressing Continue, you will be able to see the signing window with the data from the form on activity 1.1.2 "Only when the user answers yes".

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

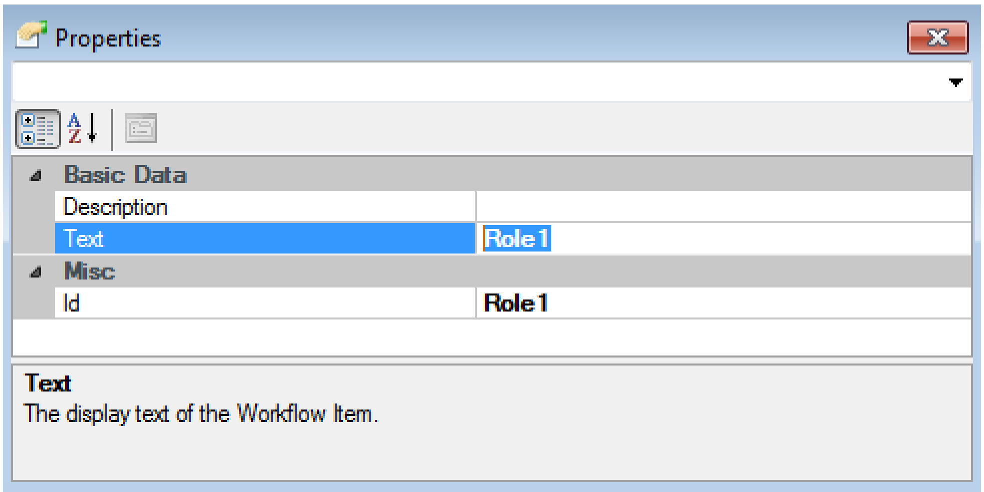
1.7 Assign user-roles til the activities

To assign more roles than the default 'Role 1' click on the role-icon in the top right hand corner.



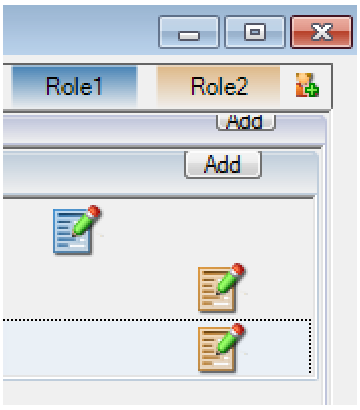
1.7.1 Change the name of a role in property window

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



1.7.2 State the rights of each role on each step

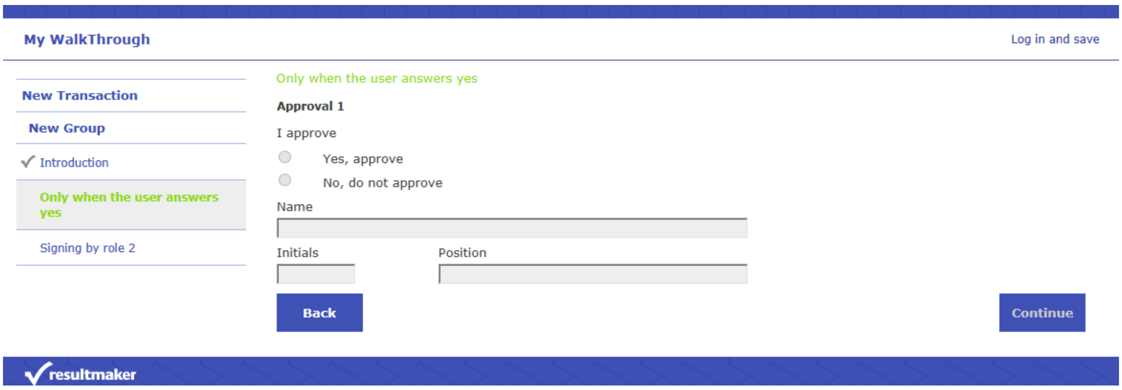
Set the first step to 'write' for 'Role 1'-role and step 2 plus the signing to 'write' for 'Role 2'-role.



1.7.3 Preview the change in the browser

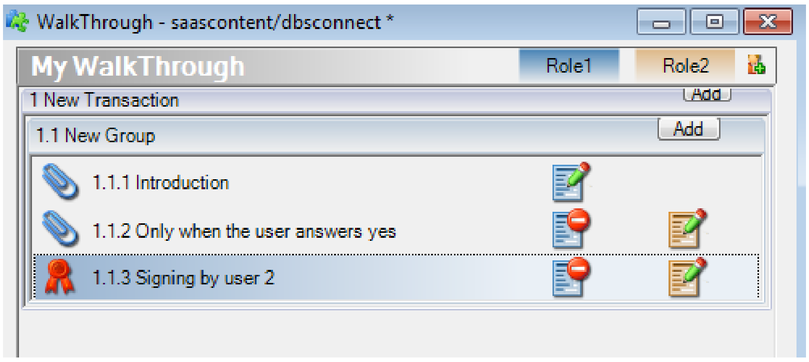
Select Yes to get to step 2. Here you can read all information, but you cannot write – try it.

In the list of steps, you will notice that the step 2 has grey text, and when you mouse over, you get an access denied icon.



1.7.4 Hide the two approval steps from the 'Role 1'-role

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



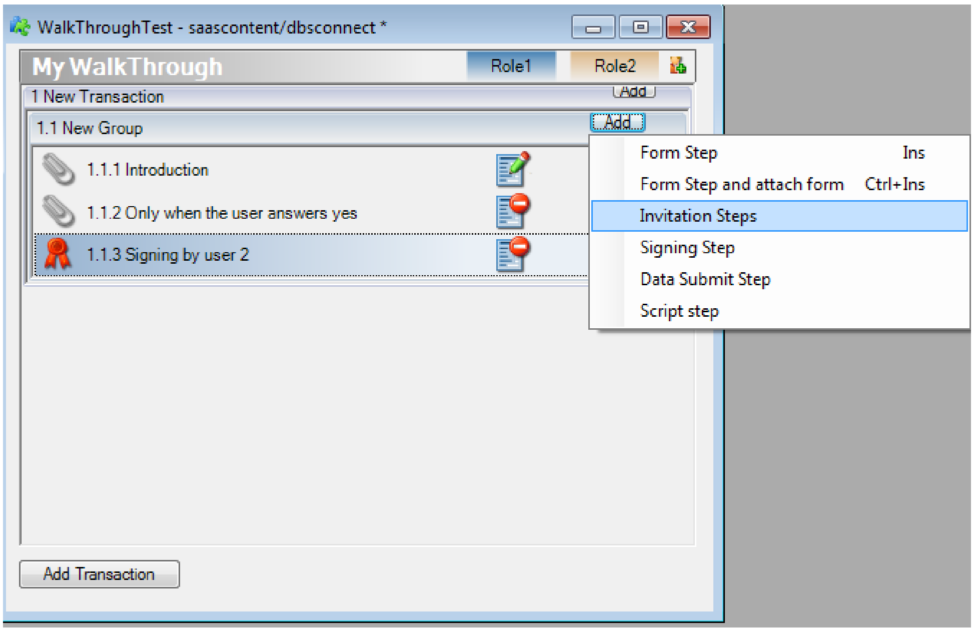
Preview the changes in the browser (F5)

1.8 Invite user 2 into the work process

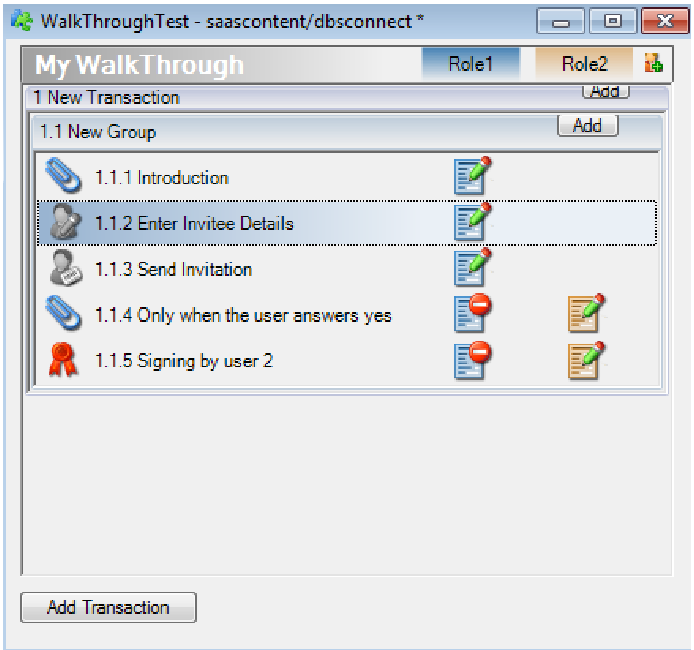
Now you only need to make it easy for user 2 to know that he/she is needed in the workprocess. This is done by inserting an 'invitation' step where this user is defined, and which sends a mail with a link to the invited person.

1.8.1 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.



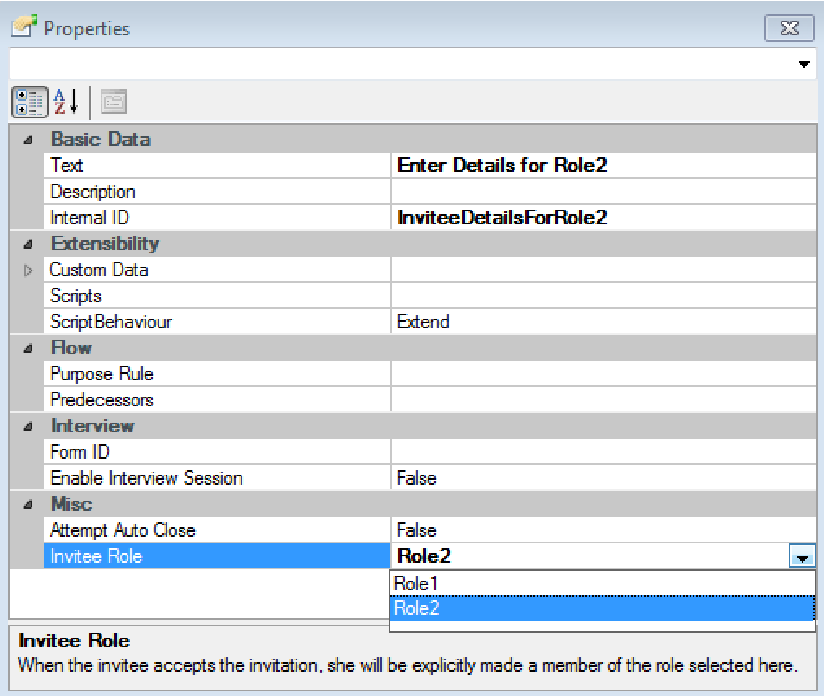
- 'Invitation Details' let the 'Role 1'-role type information about the user he/she needs to 'invite' into the work process.
- 'Send Invitation' sends off an email to the user defined at the invitation step

Alternative the role that you want to invite can be added by drag and drop the role tab of the wanted role to the step previous to the invitation, e.g. introduction in the picture above.

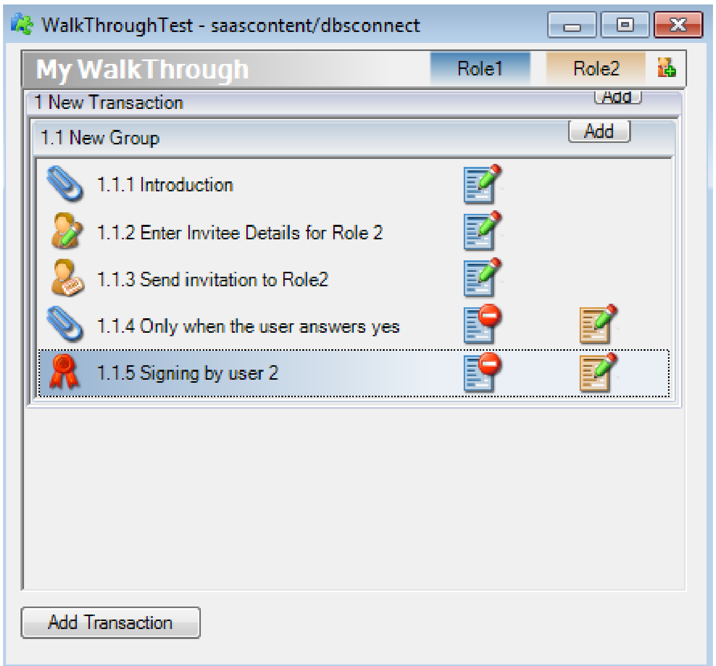
1.8.2 Set Invitation Details

Now you will need to state who will send off the invitation (the 'Role 1'-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 'Purpose rule'-field for both initation steps to Yes, so that the invitation is only part of the workflow if the Request for approval question is answered with Yes. NOTE: If the purpose role is added to one of the invitation steps it needs to be added to the orther as well.



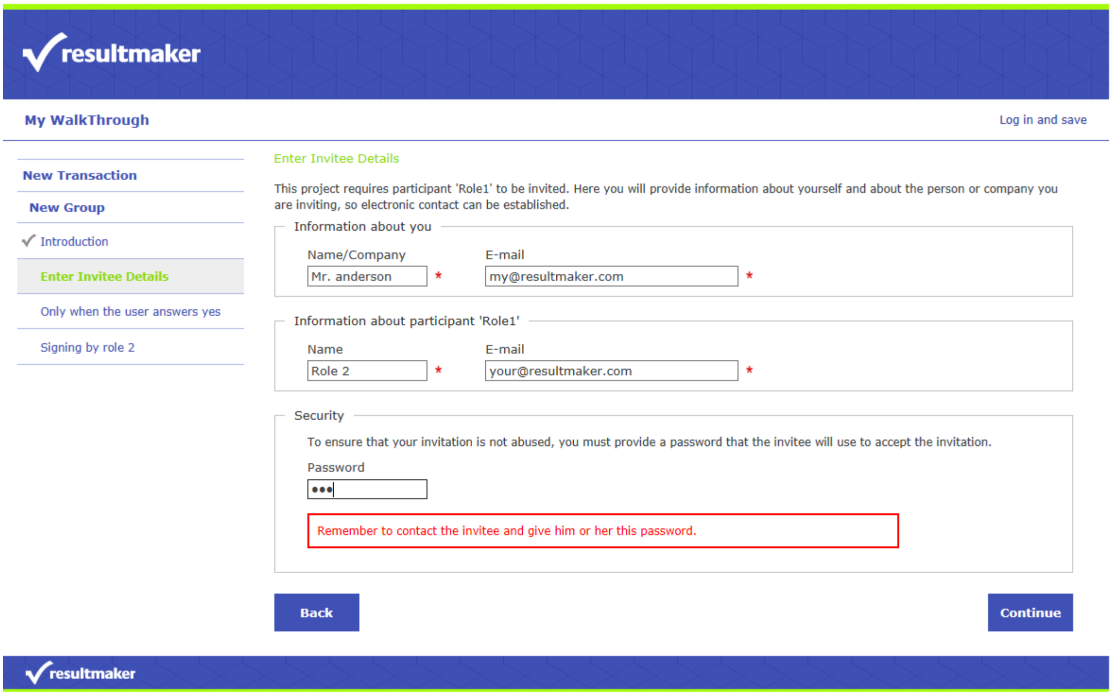
1.8.3 Preview your workflow

Hit F5 to preview. Now the user ('Role 1'-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 'Role 1'-role).

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

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 “0

Getting started with Process Design” 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 Role 2. Open your mail program and follow the instructions in the email.

From: invitation@resultmaker.com [mailto:invitation@resultmaker.com]
Sent: 28. maj 2014 09:36
To: User
Subject: Invitation

Dear User

Owner has initiated the process 'New Workflow' and hereby invites you to review and approve your part of the electronic process.

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

Owner might have entered a password that you will need in order to access your part of the process. 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.

New Workflow

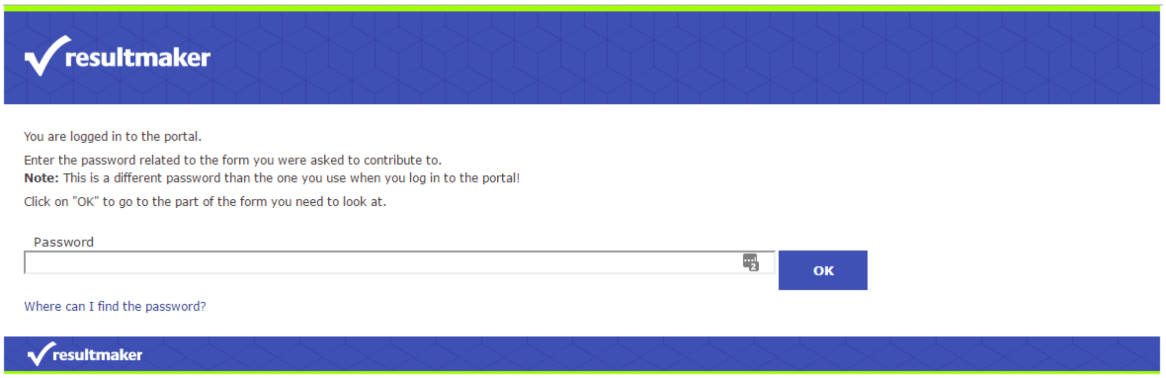
Click on the link above. When the process has been completed, the approved information will be sent to the intended receiver.

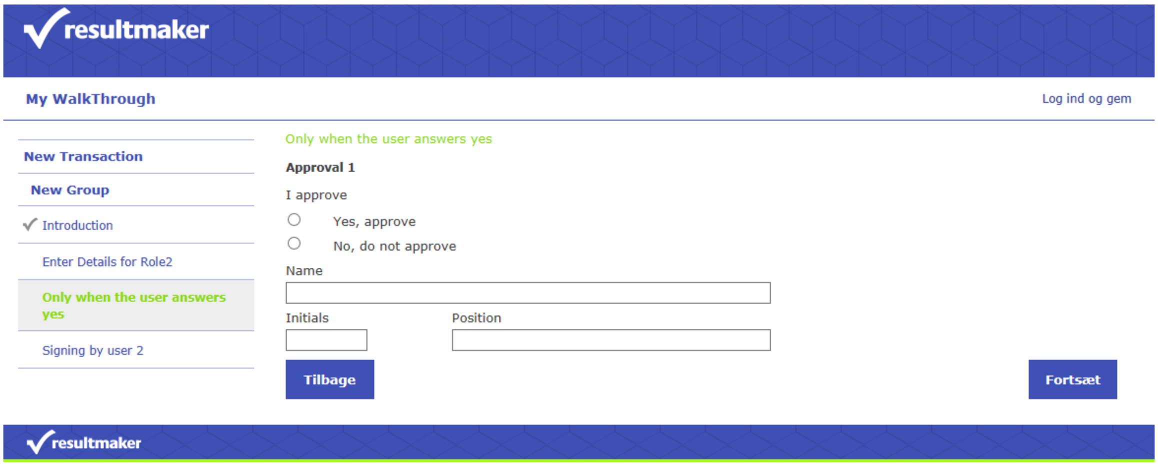
Save this e-mail so you can access the process via the link shown above.

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

1.9 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 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.

1.10 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 "2 Advanced Process Design". You are welcome to use the server and all the content you find there.

Enjoy!

2 Advanced Process Design

This section describes the more advanced aspects of Process Design.

2.1 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 "1.8 Invite user 2 into the work process"? By default this invitation page is in English as seen in Figure 1.

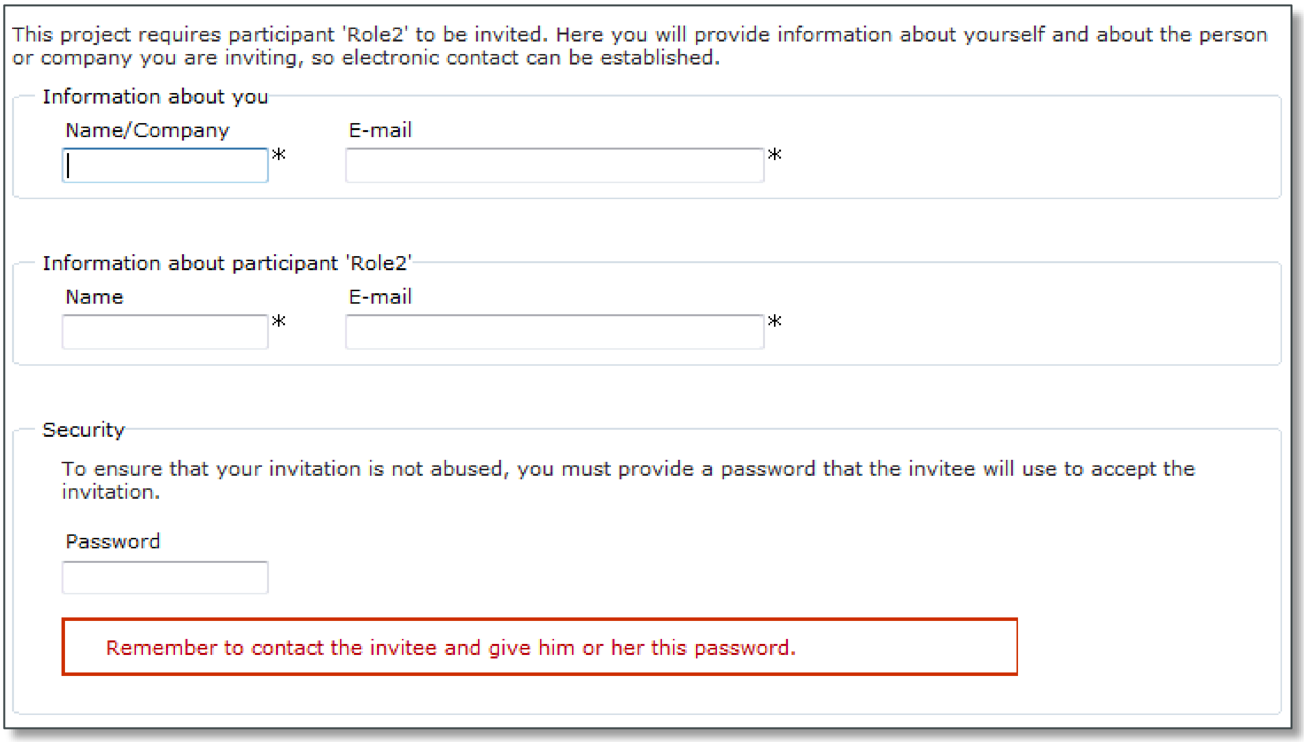
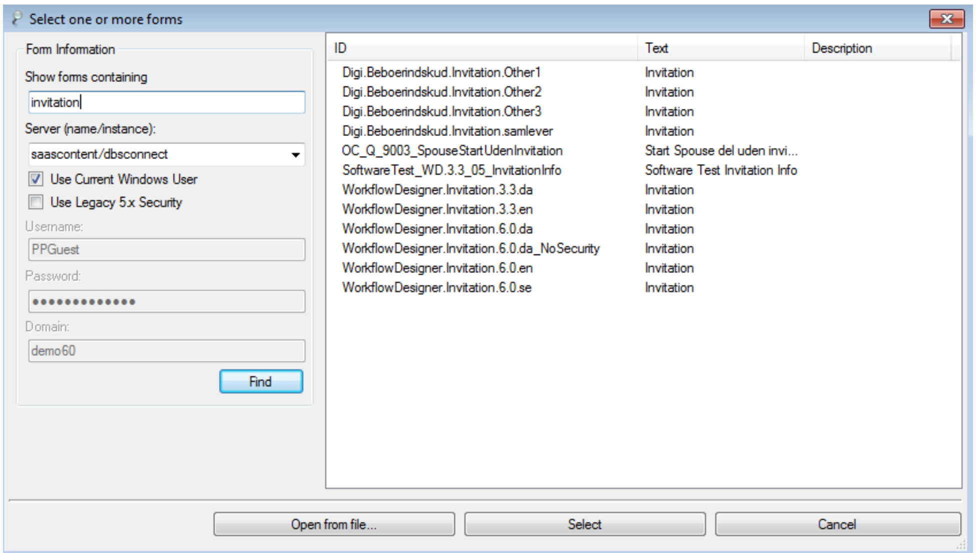


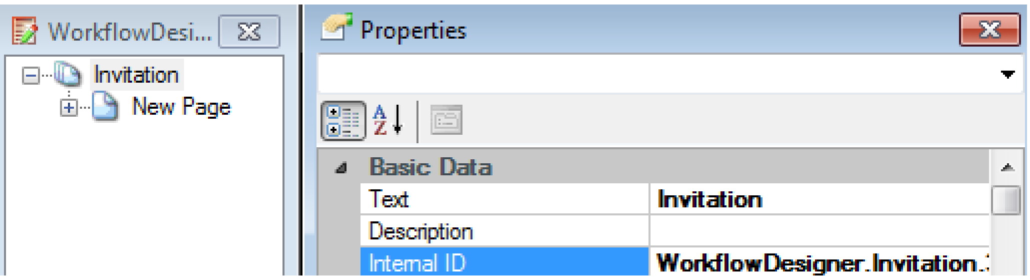
Figure 1 Standard invitation page in English

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.

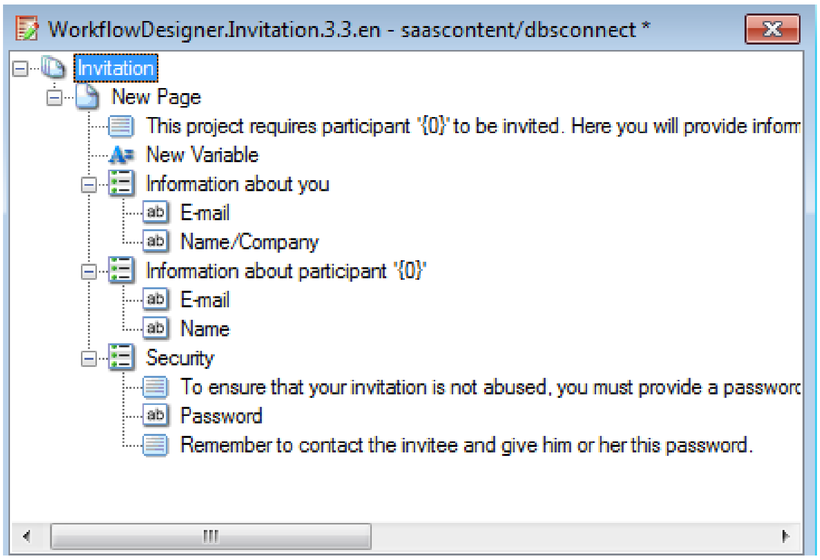
1. Open the invitation form. File, Open, Form.
2. Search for "Invitation".



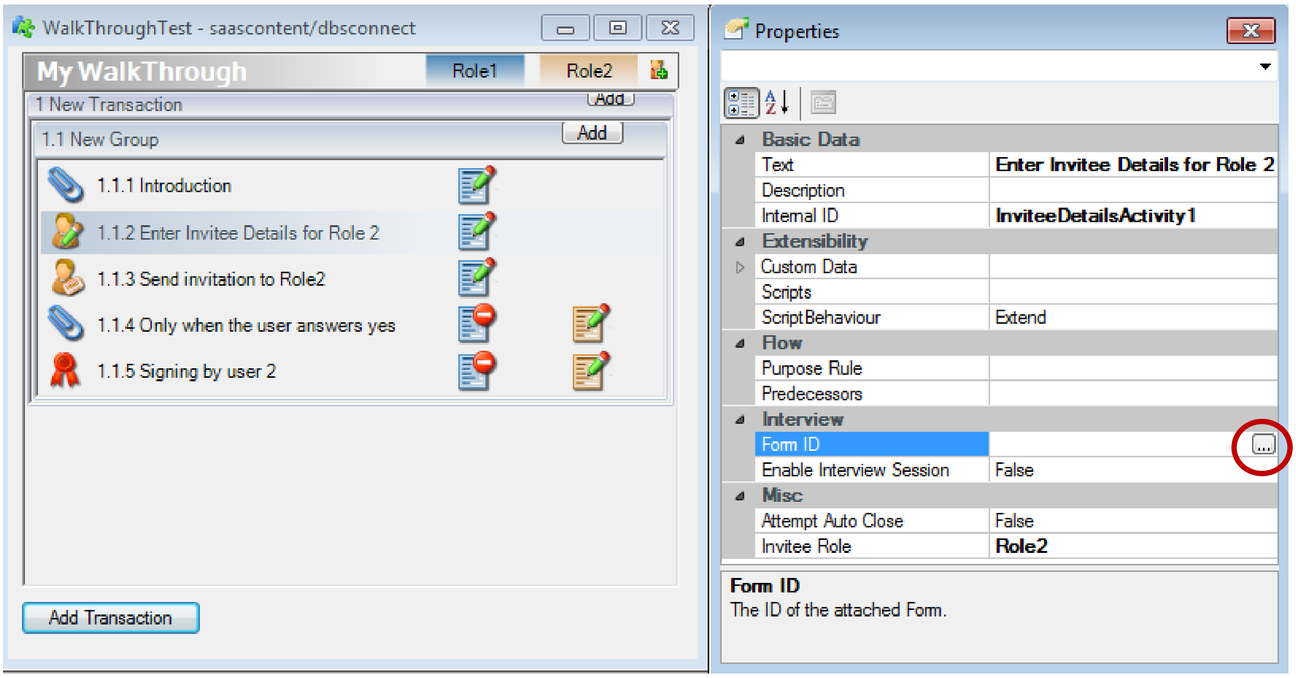
3. Select the form with the name "WorkflowDesigner.Invitation.3.3.en"
    a. If a form exists in the required language (can be seen on the last letters ".en") go to step 6.
4. Click the "Select" button.
5. Change the Internal ID of the form to match you language i.e. "WorkflowDesigner.Invitation.3.3.se" 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 or Ctrl + s
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

Interview	
Form ID	WorkflowDesigner.Invitation.
Enable Interview Session	False

2.2 Presenting receipts to the users

The Process Platform is able to generate receipt documents out of the box.This section describes how to setup these printable receipts, using the Process Designer.

2.2.1 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. Both can be used, but to separate the signing from the receipt both are often used. Meaning that signing is only used for signing and Data submit Activity is used only for generating receipt. Another advantage of 'Data submit activity' step is that most of required steps are preset by default, including a streamer button.

To get the fields in the properties manager In either one of the forms, the field 'Create receipt' needs to be set to true

Document Creation	
Create Sign Input	True
Create Xml Instance	False
Create Receipt	True
Data Extract ID	928818
Data Collection Activities	1.1.1, 1.1.2

Configuring the Data Submit (or Signing) activity

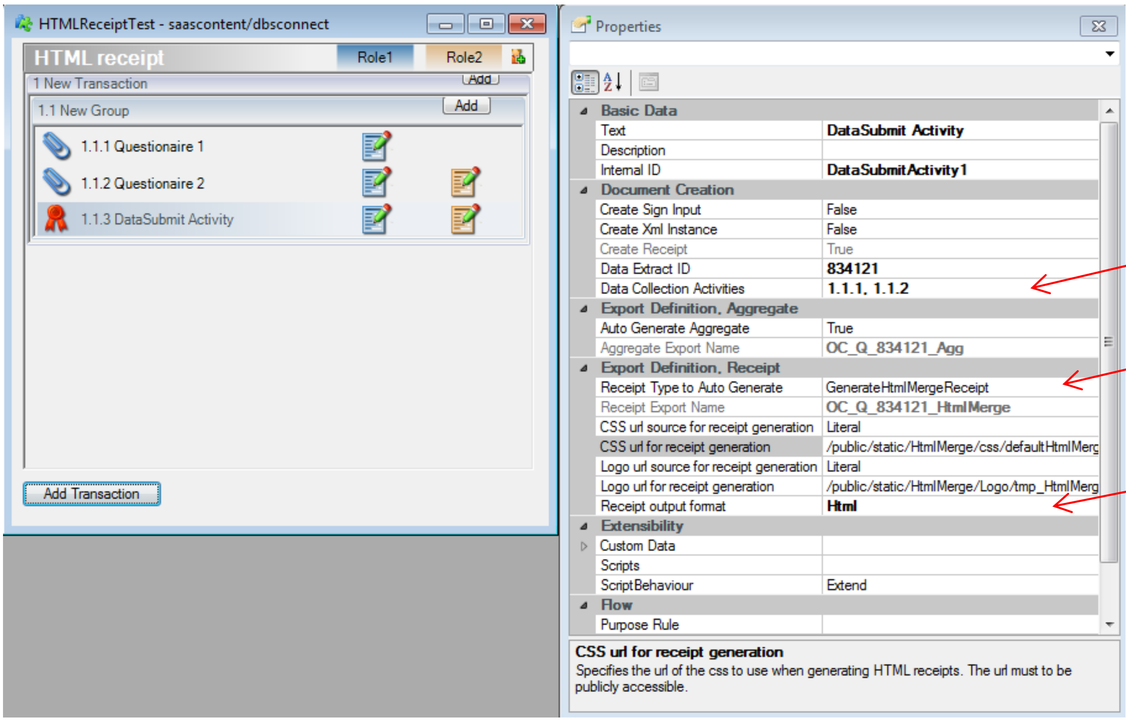


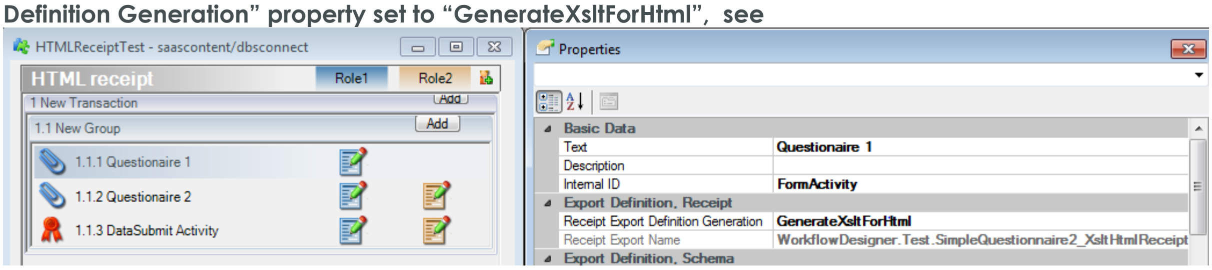
Figure above shows a workflow with two form activities and a Data Submit activity. In the "Data Collection Activities" property on the "Data Submit Activity" it is possible to reference the activities from which data is to be collected for the receipt generation, in the shown example from the activities with the numbers 1.1.1 and 1.1.2. The example used here is the forms 'Test.SimpleQuestionaire' and in the second step 'Test.AnotherSimpleQuestionaire'. The data submit is a simple data submit step.

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

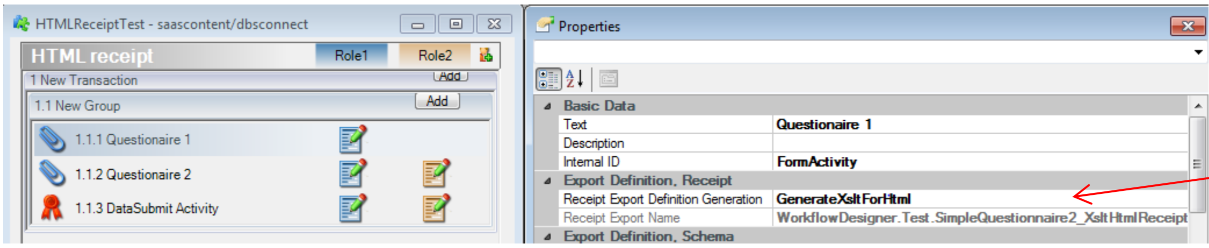
The "Receipt output format" can either be Pdf or Html, chosing either will generate a receipt in the corresponding format. (NOTE that it should be corresponding to what is selected in the forms that it isreferencing(e.g. 1.1.1 and 1.1.2)

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 "receipt Export Definition Generation" property set to "GenerateXsltForHtml", see



.



Configuring the form activity form Html Merge

To ensure that the user can actually see the receipt , there needs to be added a 'New Streamer Button' either by adding it with right click on the page in the form manager or in the layout toolbox.

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

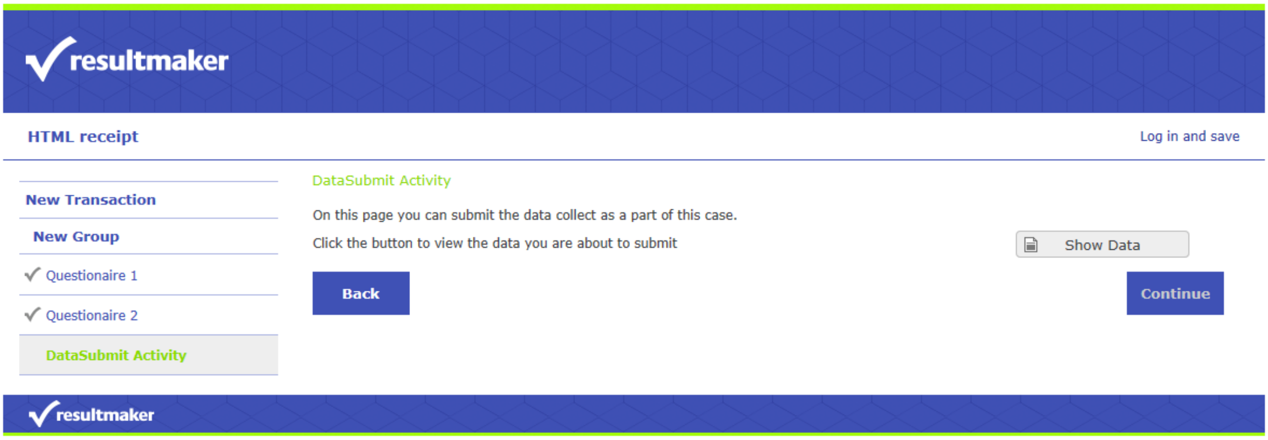
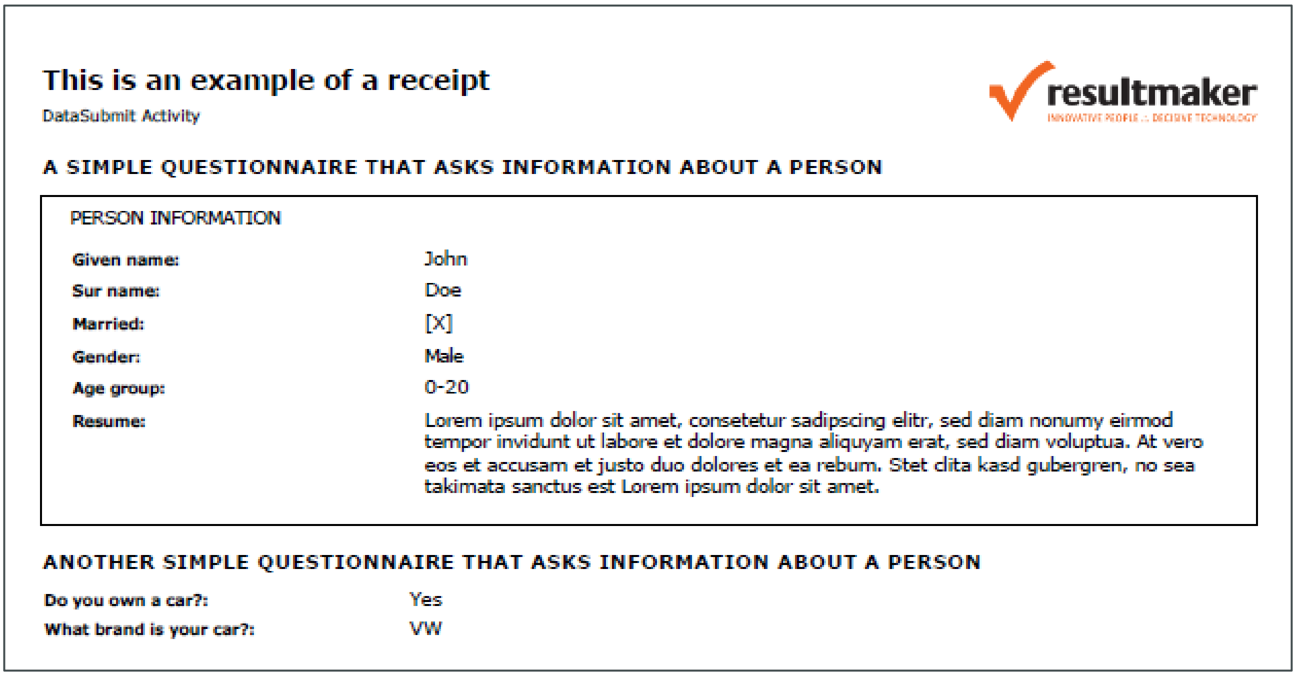


Figure 2 Opening a receipt on a Data Submit Activity

The receipt will open in a new window and looks like the one presented in the figure below



This is an example of a receipt

DataSubmit Activity

resultmaker

INNOVATIVE PEOPLE :: DECISIVE TECHNOLOGY

A SIMPLE QUESTIONNAIRE THAT ASKS INFORMATION ABOUT A PERSON

PERSON INFORMATION

Given name:	John
Sur name:	Doe
Married:	[X]
Gender:	Male
Age group:	0-20
Resume:	Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonumy eirmod tempor invidunt ut labore et dolore magna aliquyam erat, sed diam voluptua. At vero eos et accusam et justo duo dolores et ea rebum. Stet clita kasd gubergren, no sea takimata sanctus est Lorem ipsum dolor sit amet.

ANOTHER SIMPLE QUESTIONNAIRE THAT ASKS INFORMATION ABOUT A PERSON

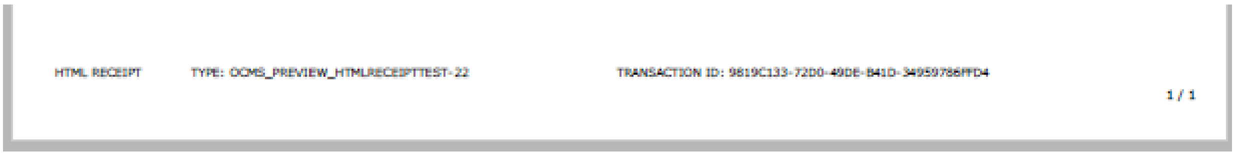
Do you own a car?:	Yes
What brand is your car?:	VW

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.



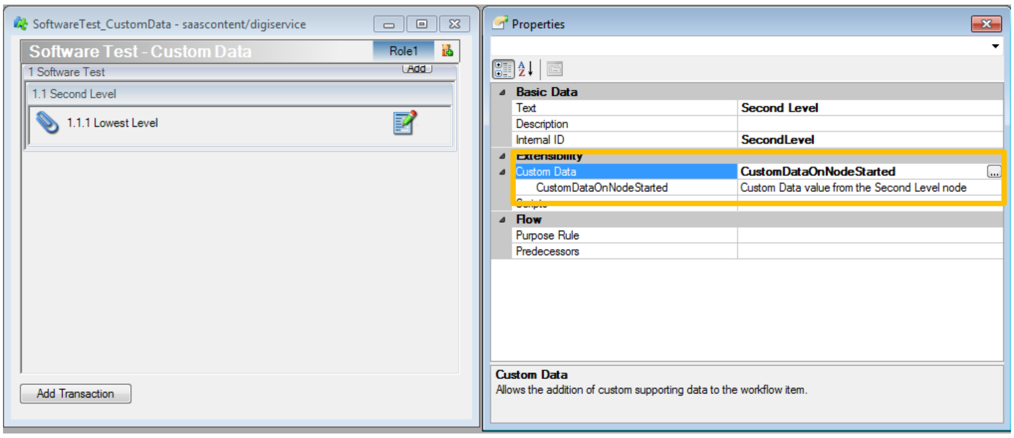
Receipt footer example

2.3 Customdata

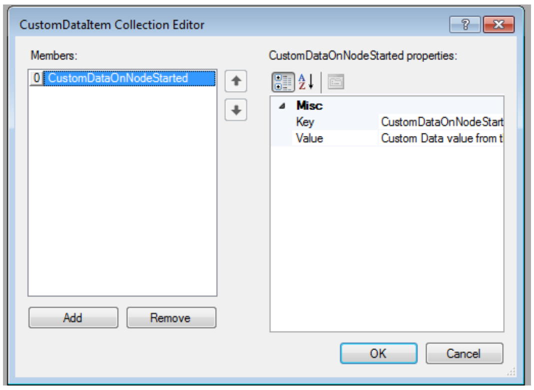
Custom data gives the possibility to communicate from design time to run time, In Process Platform it is possible to specify Custom Data items in the properties on all workflow levels. These properties consist of a series of name and value pairs – the Custom Data items, that can arbitrarily be set. These values can then be read by Process Engine scripts or assembly extensions, that can behave depending on the specified Custom Data values.

2.3.1 Settting and reading Custom data

The custom data is located in the property window under Extensibility and is available in all workflow activities, e.g. first and second level as shown below.



As seen in the fig. above it is possible to set, change or delete the customdata by clicking the '… ' next to the name. when clicked, the window shoen below is displayed.

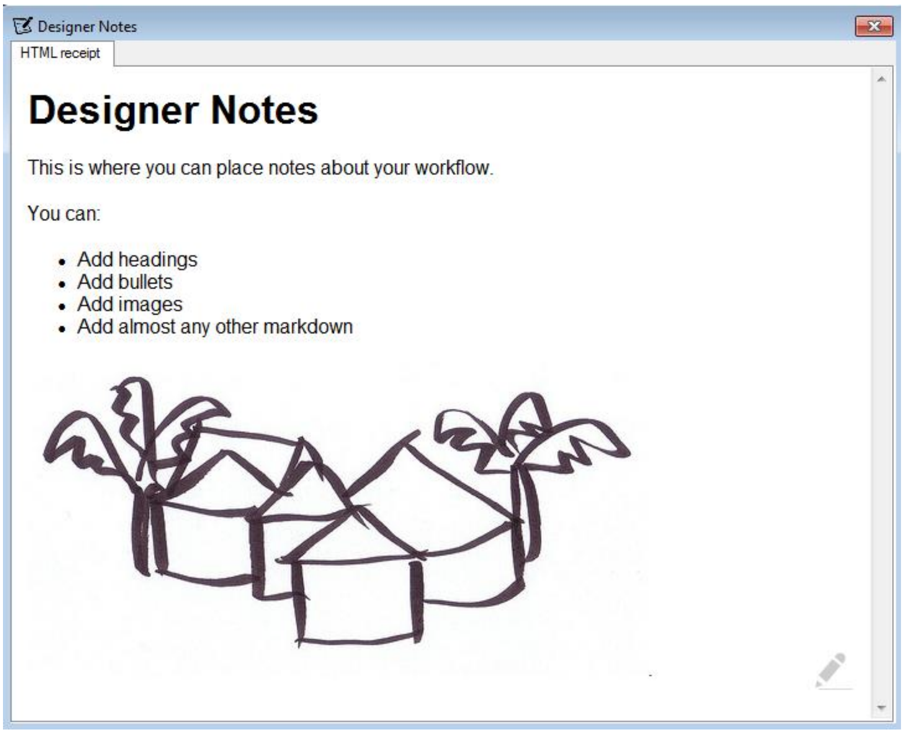


Here it is possible to remove or add CustomData.

The Custom data are accessible at runtime and can be read by scripts and extensions. This can then be used for logic and input variables.

2.4 Creating notes for the workflow

The Process Platform lets you keep track of your notes regarding your workflow, this can be usefull when returning to a workflow or if more are working on the same workflow. See figure below.



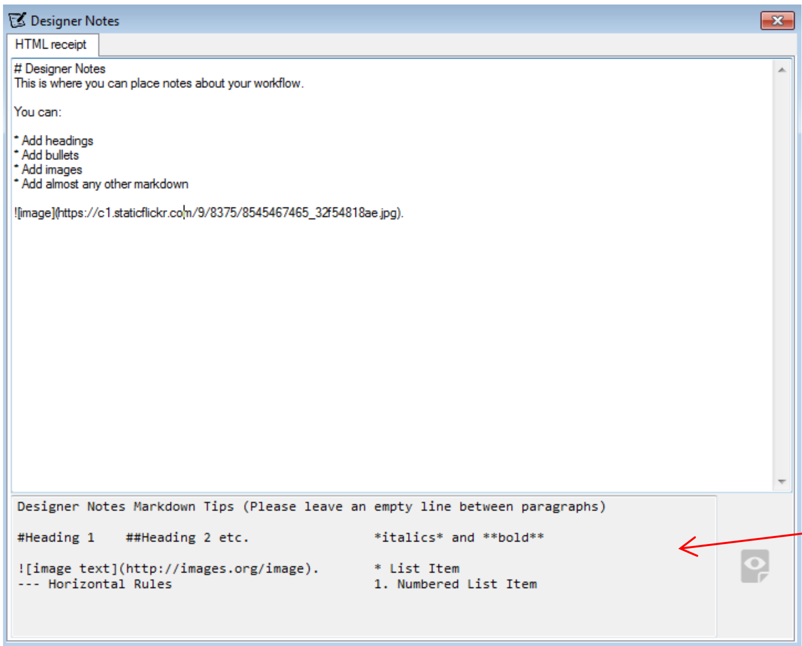
This section will describes how to use the workflow.

2.4.1 Creating and using Designer Notes

The Designer Notes will be shown in a separate window when pressing ctrl + t, when you have activated the workflow window. It is possible to add different markdown elements to the notes: headings, bullets, images, etc.

To start writing notes you click the pencil in the bottom right corner.

This will give you a page for you to add your notes. In the bottom of that page there are tips for how to style and write the notes with markdown.

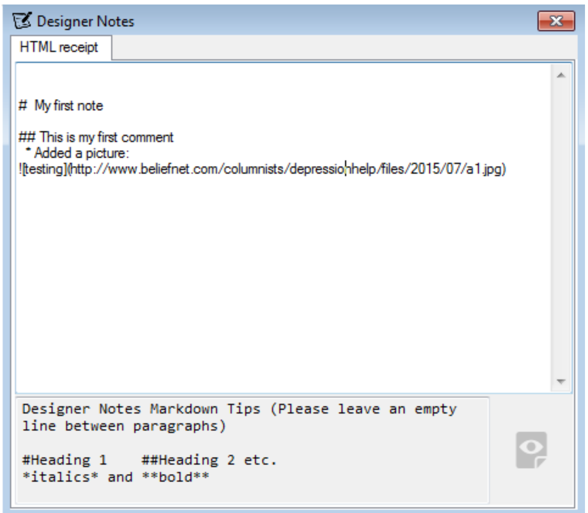


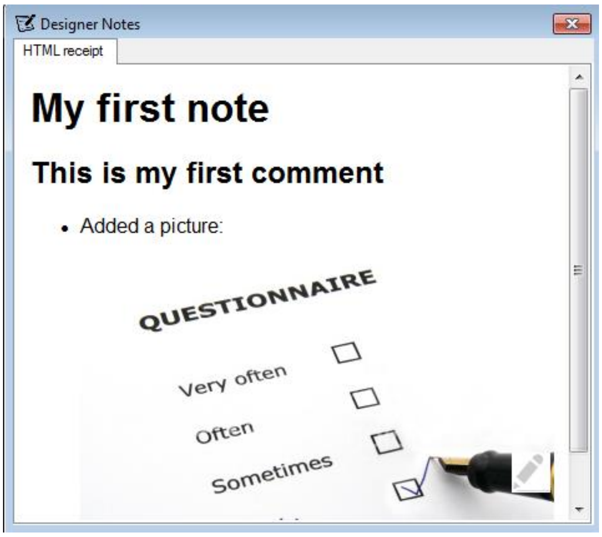
Designer Notes page that lets you write your notes

Tips for using Markdown in the Designer Notes Window

To see the notes you have created press the view document symbol in the bottom right of the window.

Now you can write whatever notes you might find relevant for the workflow, a small test is shown below to give another example of how to use it.





It is also possible to add designer notes for each form, this is shown in User manual For Form Designer Process Platform 6.2.