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# Getting Started with Resultmaker Process Designer

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Create your first Workflows and Forms.  
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# 1 Welcome

Welcome and thank you for choosing **Resultmaker Process Platform**. Resultmaker Process PlatForm 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 Process Designer**'s essential features in this guide. Well, nevertheless the intended audience of this guide is the process consultant.

## WHAT IS IT?

**Resultmaker Process Platform®** is the full software package for designing and executing Processes.

**Resultmaker Process Designer®** is the tool used for designing and developing processes.

😊 **Process Owner** is the role who owns the process – the business owner.

😊 **Process Consultant** is the role who designs and develops the process using Resultmaker Process Designer®.

😊 **System Developer** is the role who configures the system and does the more technical stuff.

## 1.1 What this guide will teach you

This Getting Started Guide will teach you the basics of working with **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 – terminology and a conceptual understanding
- Changing an existing Workflow and creating a new Workflow from scratch

## 1.2 Prerequisites

As a Process Consultant your IT skills should be at IT super user level. You can design processes without any coding skills. Anyways it's helpful to have a technical mind and have some technical interest.

You should install Resultmaker Process Designer on your PC and have access to an environment, where you can execute your process. You are welcome to use Resultmaker's demo environment (<http://demo61.resultmaker.com>)

## 2 Installation of Resultmaker Process Designer

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.

	WHAT	WHY	PRE-REQUISITE STEP	XP <sup>1</sup>	VISTA <sup>2</sup>	WINDOW S 7	WINDOW S 8	SIGN <sup>3</sup>	LINK (CLICK TO INITIATE THE STEP)
1	MS Windows	Base operating system.  <i>Note:</i> Resultmaker Process Designer 6.0 runs on Windows XP, Vista and Windows 7, 8 and 8.1							[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				<a href="http://www.microsoft.com/downloads/details.aspx?familyid=262D25E3-F589-4842-8157-034D1E7CF3A3&amp;displaylang=en">http://www.microsoft.com/downloads/details.aspx?familyid=262D25E3-F589-4842-8157-034D1E7CF3A3&amp;displaylang=en</a>
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				<a href="http://www.microsoft.com/downloads/details.aspx?FamilyId=A8F5654F-088E-40B2-BBDB-A83353618B38&amp;displaylang=en">http://www.microsoft.com/downloads/details.aspx?FamilyId=A8F5654F-088E-40B2-BBDB-A83353618B38&amp;displaylang=en</a>
4	.NET 2	Must be on your PC to run Resultmaker Process Designer – except if you have .NET 3 or later <sup>4</sup>		X					<a href="http://www.microsoft.com/downloads/details.aspx?familyid=0856eacb-4362-4b0d-8edd-aab15c5e04f5&amp;displaylang=en">http://www.microsoft.com/downloads/details.aspx?familyid=0856eacb-4362-4b0d-8edd-aab15c5e04f5&amp;displaylang=en</a>

<sup>1</sup> PerForm these steps, if you have XP on the PC

<sup>2</sup> PerForm these steps, if you have Vista on the PC or XP with .Net3 or .Net3.5

<sup>3</sup> PerForm these steps, if you want to try out solutions with the Danish digital signature

<sup>4</sup> Vista comes with .Net3.

5	.NET 2 SP1	Must be on your PC to run Resultmaker Process Designer—except if you have .NET 3 or later	4	X					<a href="http://www.microsoft.com/downloads/details.aspx?FamilyID=0c1b0a88-59e2-4eba-a70e-4cd851c5fcc4&amp;DisplayLang=en">http://www.microsoft.com/downloads/details.aspx?FamilyID=0c1b0a88-59e2-4eba-a70e-4cd851c5fcc4&amp;DisplayLang=en</a>
6	.NET 3.5	Must be on your PC to run Resultmaker Process Designer		X	X		X	X	<a href="http://www.microsoft.com/downloads/details.aspx?familyid=333325FD-AE52-4E35-B531-508D977D32A6&amp;displaylang=en">http://www.microsoft.com/downloads/details.aspx?familyid=333325FD-AE52-4E35-B531-508D977D32A6&amp;displaylang=en</a>
7	.NET 3.5 SP1	Must be on your PC to run Resultmaker Process Designer	6	X	X		X	X	<a href="http://www.microsoft.com/downloads/details.aspx?familyid=AB99342F-5D1A-413D-8319-81DA479AB0D7&amp;displaylang=en">http://www.microsoft.com/downloads/details.aspx?familyid=AB99342F-5D1A-413D-8319-81DA479AB0D7&amp;displaylang=en</a>
8	<b>Result maker Process Designer</b>	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).	3, 5	X	X				Process Designer 6.0.xxxx.zip
9	Pointer to the Result maker server	Points Resultmaker to a demo server. <i>demo61.resultmaker.com</i> . Check availability via the links.  A proxy server may disrupt the connection between the Process Designer and the server	4	X	X				<a href="http://demo61.resultmaker.com/RMFrontend/">http://demo61.resultmaker.com/RMFrontend/</a>
10	Java VM	Must be on the end users' PCs in order to run a digital signature applet		X	X		X	X	<a href="http://www.java.com">http://www.java.com</a>
11	NemID	Must be available in order to sign data	8					X	<a href="https://www.nemid.nu/">https://www.nemid.nu/</a>

## 3 Learning the Basics about Process Design with Resultmaker Process Designer®

### 3.1 Process

This term is used for the whole solution that's being executed.

This could be an "Apply for money"-process which handles both the application filled out and submitted by a Citizen, the decision made by a Case Worker, the approval by Officer Manager and finally the payment to Citizen's bank account.

A **Process** basically consists of:

A **Workflow** which defines the structure, **roles**, and **steps** involved in the process.

A number of **activities** to be performed on each step of the process – activities can be **Forms** to be filled, **invitation** of new participants, **signing** data, **submitting** data, machine steps performed by a machine.

### 3.2 Workflow

The structure of the process includes the number, order and grouping of **steps**, making rules for **predecessors** – i.e. which step(s) must be performed before a given (group of) steps can be performed – adding **purpose rules** - i.e. deciding that some transactions, groups or steps should only be activated for a certain purpose/ under certain circumstances. A step is a node in the Workflow. Defining the steps includes deciding which activities to be performed on each step. Finally the Workflow holds the user roles involved in the process and define the rights for each role for each step. See the Workflow as displayed to the Process Consultant in Resultmaker Process Designer in Figure 1.

### WHAT IS IT?

**Process:** The full solution.

**Workflow:** Defines the structure, **roles** and **steps** involved in the process.

**Role:** Participant in the Process.

**Step:** A node in the Workflow. Each step points to an Activity to be performed. It's also possible to add rules for the execution of the Activity – fx rules for predecessors and purposes.

**Activity:** Forms to be filled, invitation of new roles, signing data, submitting data, machine steps performed by a machine.

**Groups:** Containers for Steps. Properties can be set on Group level. Fx. Predecessors.

**Predecessors:** Steps which are to be predecessors of a given Step.

**Purpose rules:** Rules for activation of a given Step.

## WHAT IS IT?

**W** Workflow Editor: Displays a Workflow with its Transactions, Groups and Steps. It also displays the Roles and their rights.

**S** Steps with Form activities

**R** Roles with rights assigned



Add Role Icon: Click this icon to add a new Role to the Workflow.



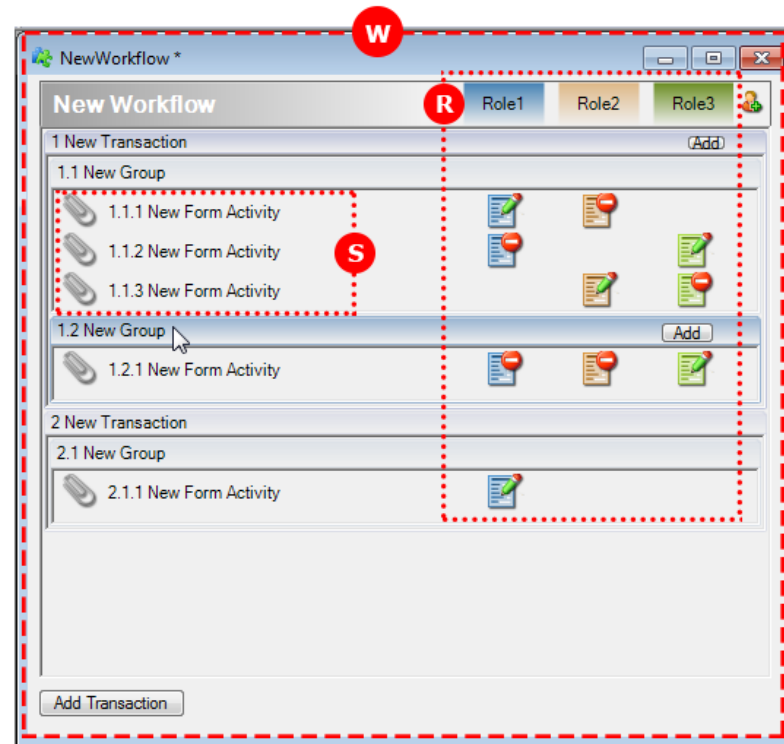
Write Access: The first role by default has Write Access to all new Steps. Click the icon to toggle rights (Write Access, No Access, Read Access).



No Access: The Role has no Access to the step.



Read Access: If no icon is displayed the Role has read access.



**Figure 1: The Workflow displayed in Resultmaker Process Designer. Transactions, Groups and steps are easily added by clicking “Add”. Roles are added by clicking the Add Role icon, Rights are changed by toggling the Access Icons. When adding a Form Activity to the Workflow a default Form is automatically added, so you can test and preview your Workflow by pressing F5.**

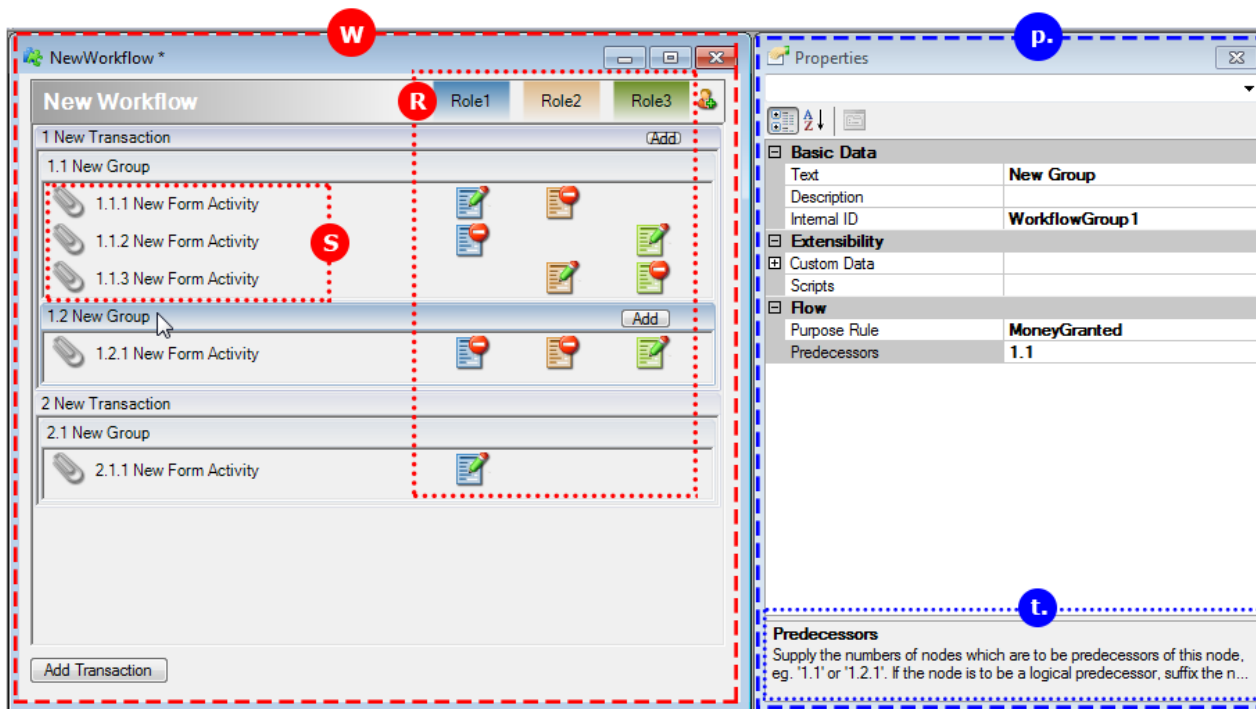


When working with Workflows you also have a whole palette of **Properties** for each element of the Workflow. The properties of the elements are displayed in the **Property Window** (Press F4 ). The Property Window displays the properties of the currently selected element. In Figur 2 the Property Window displays the properties for the Group “1.2 New Group”. The bottom area of the Property Window displays a **Tip** for the currently selected Property. In **Error! Reference source not found.** the Property “Predecessors” is selected and an Explanation for Predecessors is displayed in the bottom area of the Property Window.

## WHAT IS IT?

**p.** Property Window: Displays the properties of any selected element.

**t.** Tip: The bottom area of the Property Window displays an explanation for the currently selected property.



Figur 2: Left: Workflow Editor. Right: Property Window. The Property Window displays the properties of the currently selected element of the Workflow.

## WHAT IS IT?

**G** Group (Workflow Group): A Group or Workflow Group is a container for Activities in a Workflow.

**ADD** Add: Add Activities to a Workflow by simply clicking "Add" on a Workflow Group

### 3.3 Forms

A **Form** is one of the Activities, which can be attached to a Step in the Workflow.

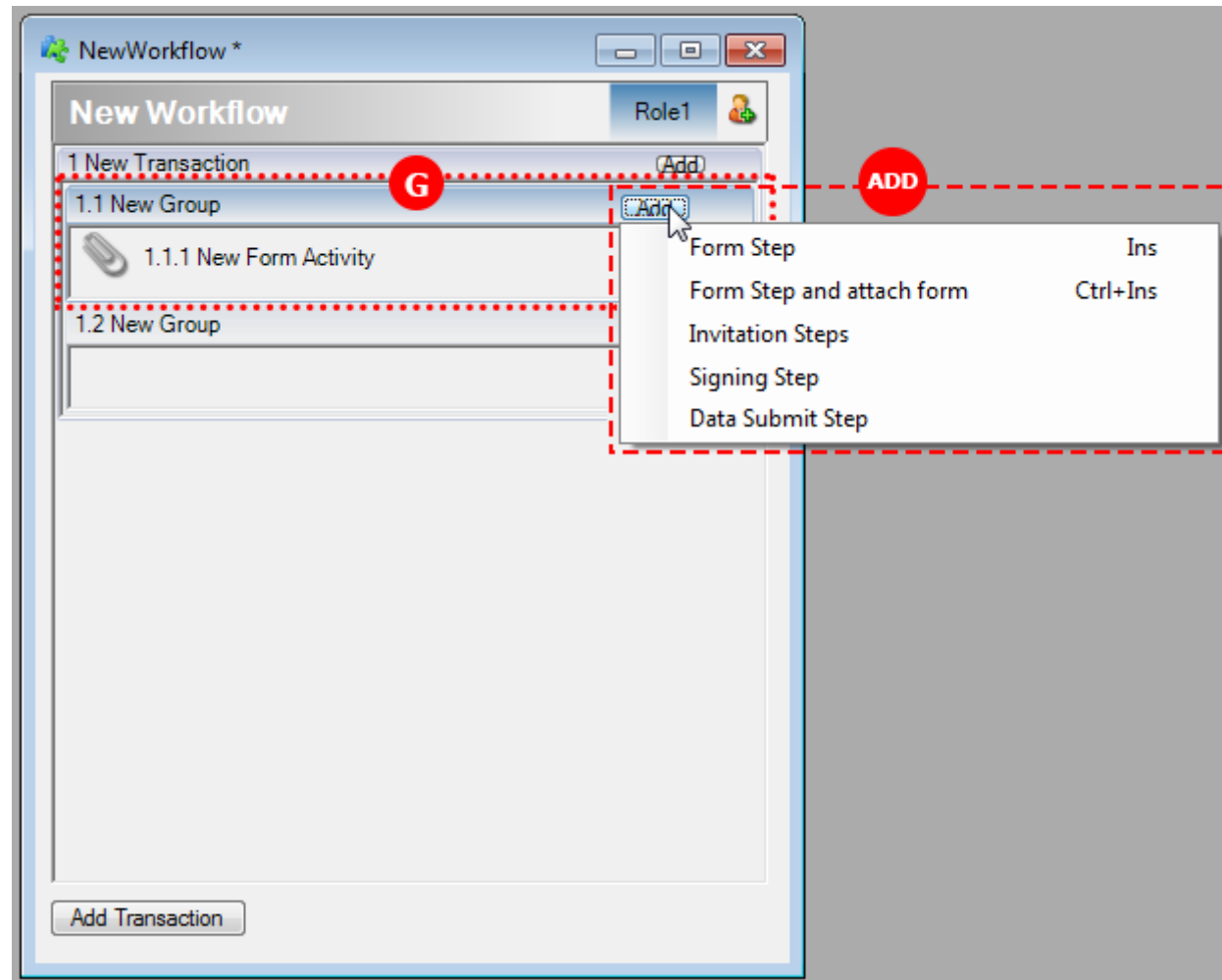


Figure 3: Adding an Activity to a Workflow - Press "Add" on a Group in the Workflow to add an Activity.

Forms are edited in the **Form Editor** and make use of the Property Window – just like Workflows do.

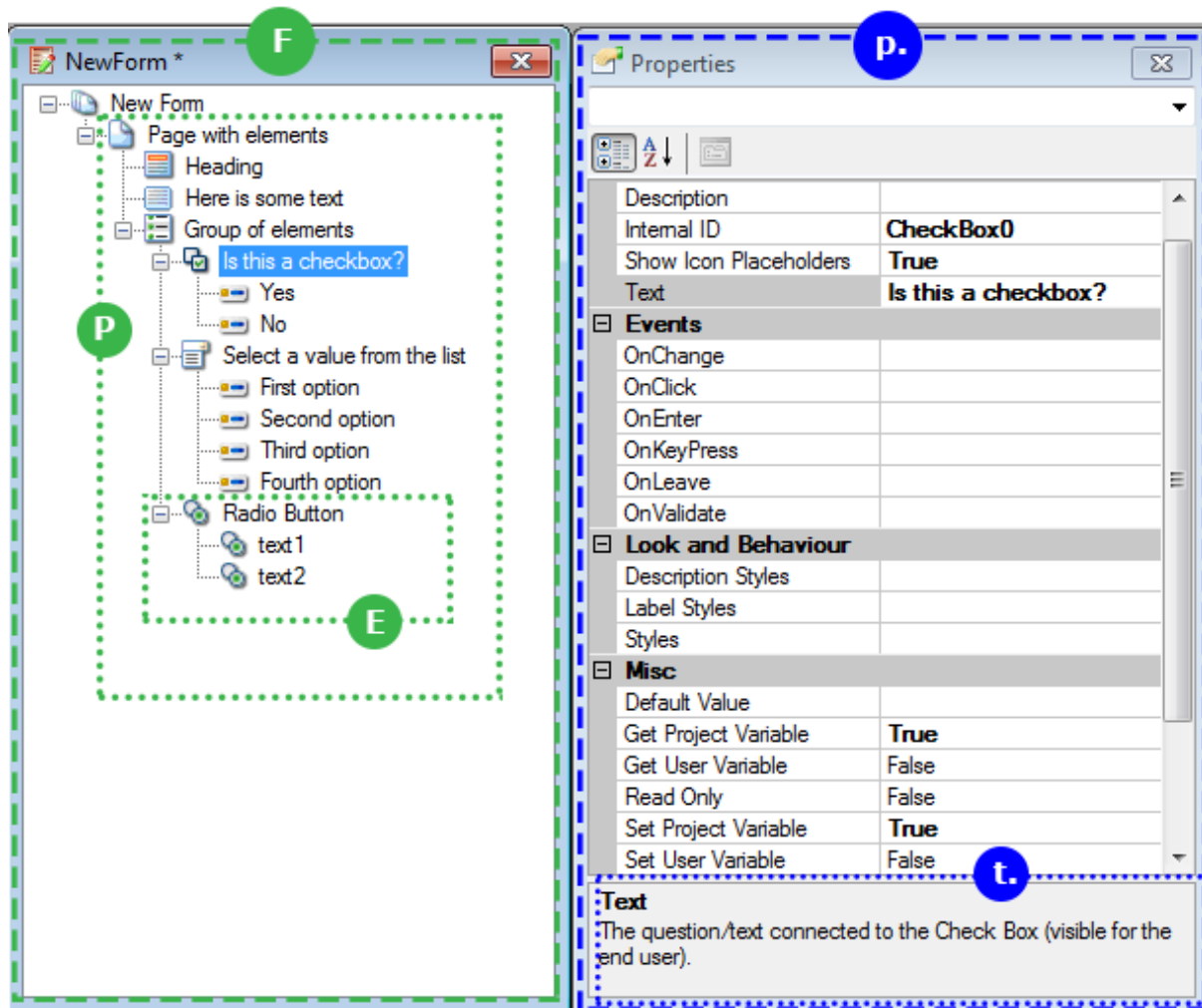


Figure 4: Left: Form with elements. Right: Properties for the Form Element with internal ID "CheckBox0".

## WHAT IS IT?

**F** Form Editor – this is where you organize the Elements of your Form. A Form can contain one or more pages. Each Page can contain several Elements.

**P** Page: One Form can have more than one Page.

**E** Form Element: Elements are fx Heading, Texts Checkboxes, Dropdown lists, Radio buttons etc.

**p.** Property Window: Displays the properties of the currently selected item in the Form Editor.

**t.** The bottom area of the Property Window displays a Tip for the currently selected property.

The screenshot displays the Resultmaker web application interface. At the top left is the Resultmaker logo with the tagline "INNOVATIVE PEOPLE :: DECISIVE TECHNOLOGY". The top right corner shows the user "User: PPGuest". On the left side, there is a "Process" sidebar with a "Steps" section containing a "New Form" button. The main area is titled "Preview workflow of eForm: New Form" and contains a preview of a form. The form is enclosed in a green dotted border and includes a "Heading" section with the text "Here is some text". Below the heading is a "Group of elements" box containing a checkbox labeled "Is this a checkbox?", a dropdown menu labeled "Select a value from the list" with "First option" selected and an asterisk, and a "Radio Button" section with two options: "text1" and "text2". At the bottom of the form preview area are two buttons: "Tilbage" (Back) and "Fortsæt" (Continue). The footer of the application shows the Resultmaker logo and tagline.

resultmaker  
INNOVATIVE PEOPLE :: DECISIVE TECHNOLOGY

User: PPGuest

Process

Steps

New Form

Preview workflow of eForm: New Form

New Form

Heading

Here is some text

Group of elements

☐ Is this a checkbox?

Select a value from the list

First option \*

Radio Button

☐ text1

☐ text2

Tilbage

Fortsæt

Resultmaker :: Innovative People :: Decisive Technology

Figur 5: An end-user's browser view of the same Form as in Figur 4, showing the run-time view. The area inside the dotted line displays the Form and its content.

## 4 Opening and Modifying an Existing Workflow

### 4.1 Opening an Existing Workflow from the Demo Server

Step	Action
1	To open Resultmaker Process Designer, click <b>Start &gt; All Programs &gt; Resultmaker Process PlatForm 6 &gt; Process Designer</b>

*Resultmaker Process Designer loads.*

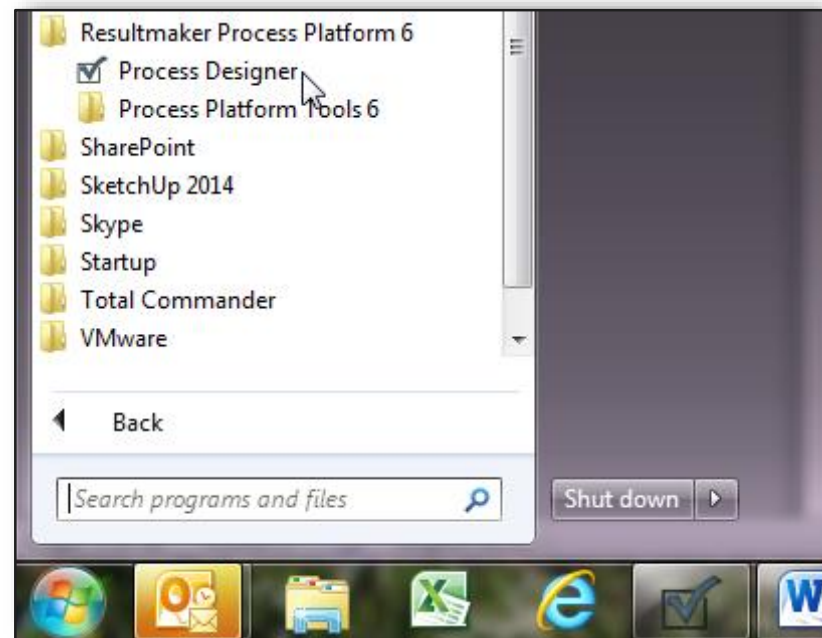


Figure 1: Starting Resultmaker Process Designer

#### ATTENTION: DEMO SERVER

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 [demo61.resultmaker.com](http://demo61.resultmaker.com); this may be updated without prior notice. Make sure that your contact in Resultmaker briefs you on which demo server to use.

## OPEN WORKFLOW (CTRL+O)

To open a Workflow

Click: File > Open > Workflow

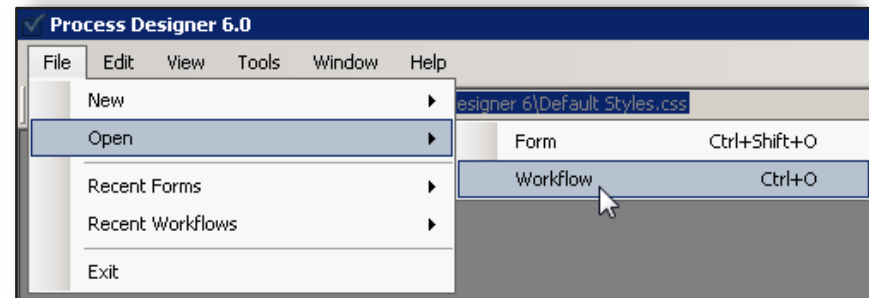
Or Press: ctrl + O

## DEMO SERVER

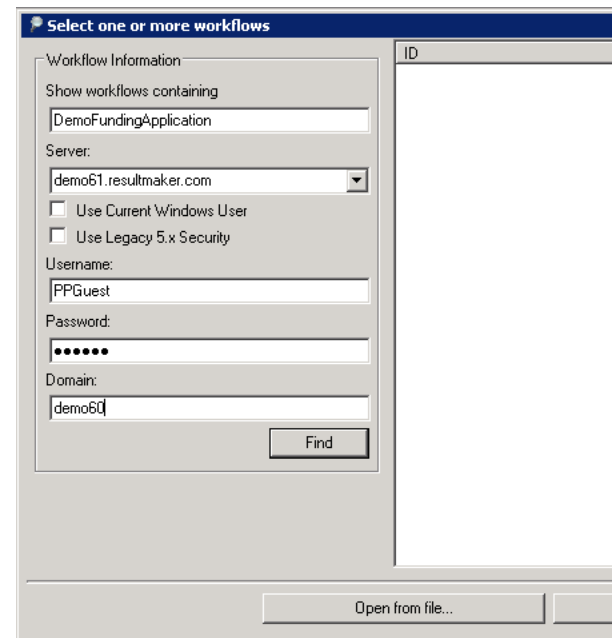
The free demo service may change from time to time. The default is <http://demo61.resultmaker.com>.

- | Step | Action                                    |
|------|---|
| 2    | Click <i>File &gt; Open &gt; Workflow</i> |

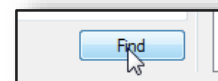
*The Open dialog box appears.*



- |   |  |
|---|--|
| 3 | <p><i>In Show Workflows containing:</i><br/><i>Type DemoFundingApplication</i><br/><b>In Server: Type</b><br/><b><i>demo61.resultmaker.com</i></b><br/><b>In Username: Type</b><br/><b><i>PPGuest</i></b><br/><b>In Password: Type</b><br/><b><i>PPpassword123</i></b><br/><b>In Domain: Type</b><br/><b><i>demo61</i></b></p> |
|---|--|



- |   |                                      |
|---|--------------------------------------|
| 4 | Click the <b><i>Find</i></b> -button |
|---|--------------------------------------|

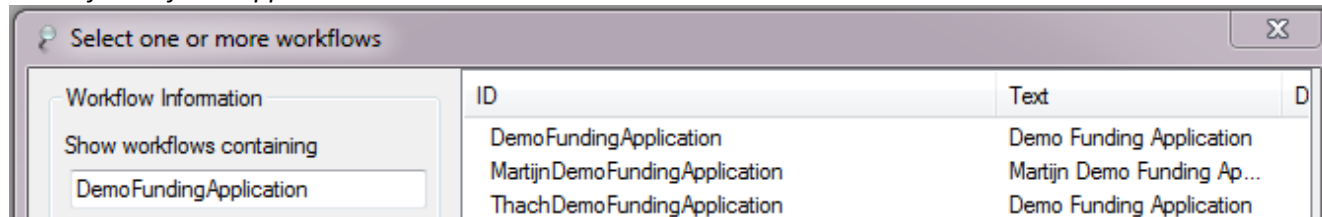


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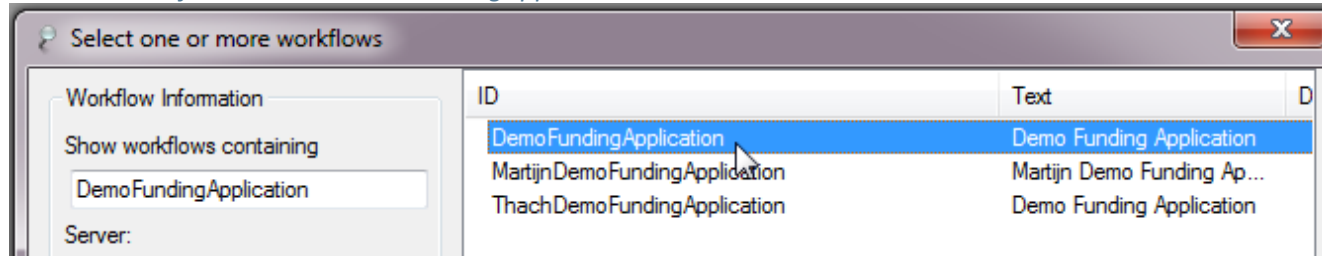
Step    Action

---

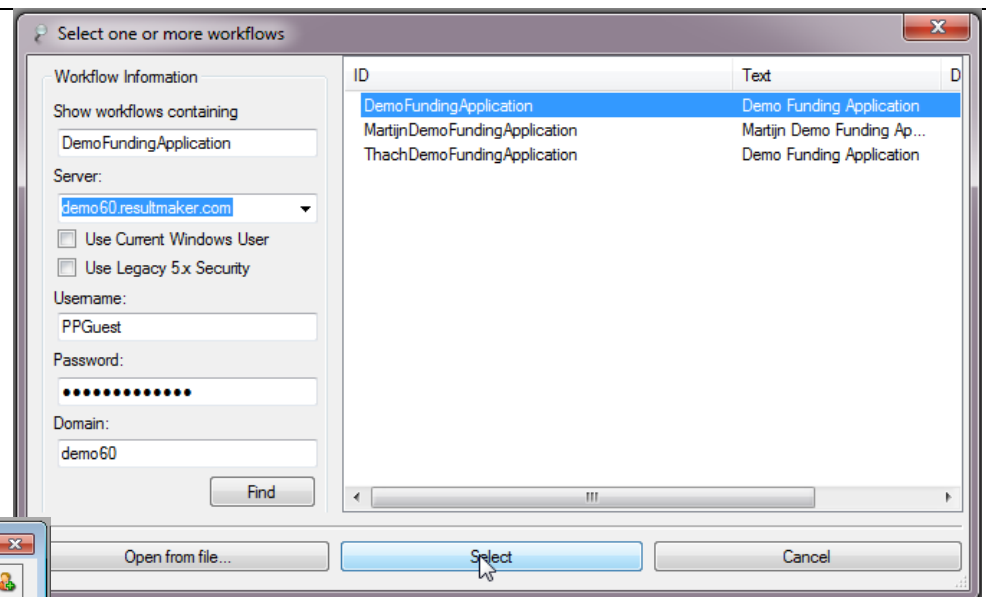
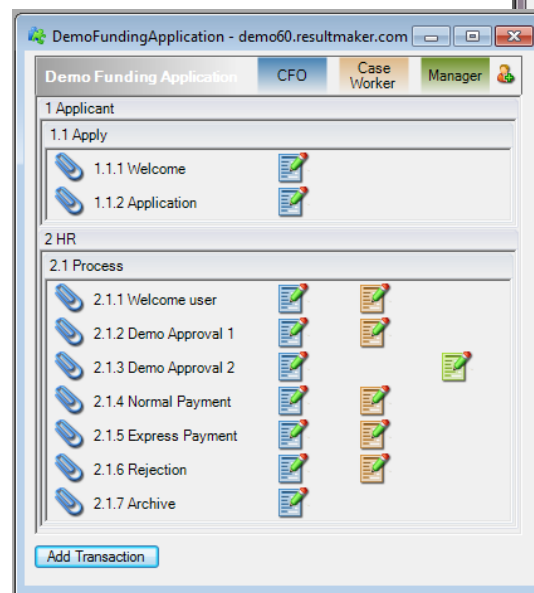
*A list of Workflows appears.*



5    *Click the Workflow with ID: DemoFundingApplication.*



Step	Action
6	<i>Click the <b>Select</b>-button. The Workflow “DemoFundingApplication” loads in the Workflow Editor window.</i>



-end-

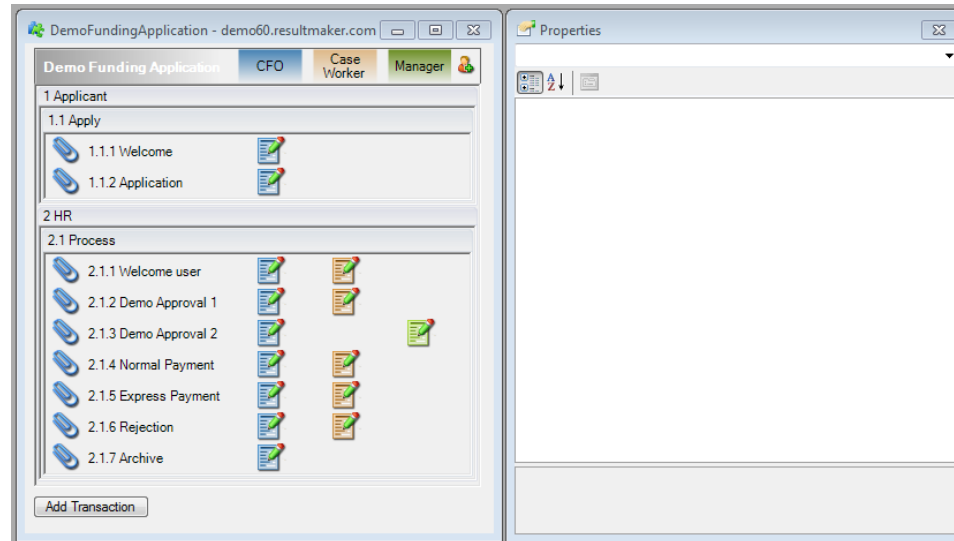


## 4.2 Create a copy from an existing Workflow

Step	Action
------	--------

- |   |   |
|---|---|
| 1 | To open Property Window:<br><i>Press F4</i> |
|---|---|

*Property Window appears*



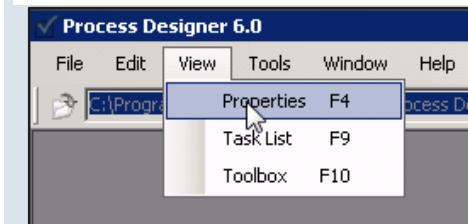
### PROPERTY WINDOW (F4)

Press F4 to open Property Window.

OR click: View > Properties

Property Window is empty when it opens.

Click on a Workflow Element, and the Property Window displays the properties of that element.



---

Step	Action
------	--------

---

2 In the Workflow Editor, click the Workflow name DemoFunding Application

The properties of the Workflow root level appear in the Property Window.

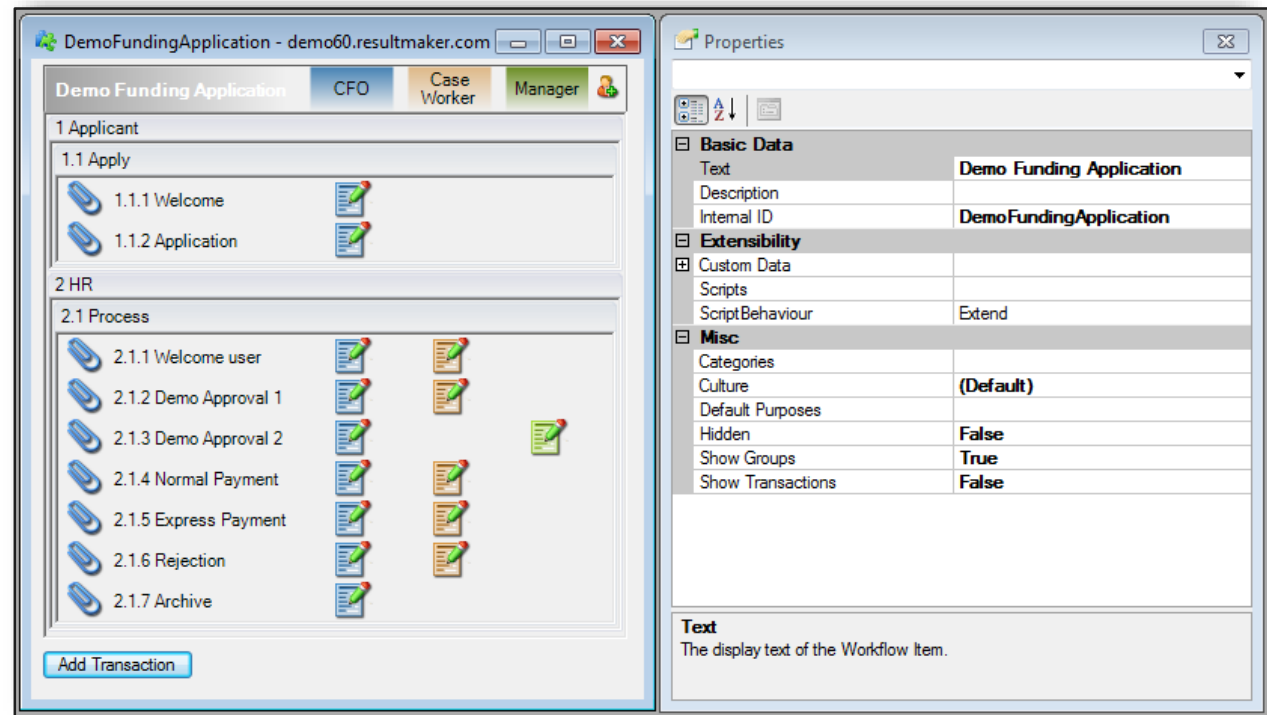


Figure 6: Workflow Editor is shown to the left. The Property Window is shown to the right. The Property Window always displays the properties of the currently selected element in the Workflow window.

**3 Create your own copy and give it a new name:**

*In the Property Window,*

- click in **InternalID**
- enter a new Internal ID.

(Don't use space or special characters)

Internal ID is used by the system to identify this specific Workflow. By changing the InternalID you create your own copy of the Workflow.

*In the Property Window,*

- Click in Text
- Enter a new Name.

*Text is the Name of the Workflow as displayed to the user*

The screenshot shows a 'Properties' window with a tree view on the left and a table of properties on the right. The 'Internal ID' field in the 'Basic Data' section is highlighted with a blue selection bar and a mouse cursor. Below the table, there is a section for 'Internal ID' with a description.

Basic Data	
Text	Demo Funding Application
Description	
Internal ID	DemoFundingApplication

Extensibility	
Custom Data	
Scripts	
Script Behaviour	Extend

Misc	
Categories	
Culture	(Default)
Default Purposes	
Hidden	False
Show Groups	True
Show Transactions	False

**Internal ID**  
The internal ID of the Workflow Item.

## PROPERTIES: TEXT AND INTERNAL ID

**Text** contains the Name of the Workflow as displayed to the end user.

**Internal ID** is used by the system to identify this specific Workflow. By changing the InternalID you create your own copy of the Workflow.

## INTERNAL ID NAMING CONVENTION

Internal ID must begin with a letter [a-z][A-Z] and may be followed by any number of:

Letters  
 Digits [0-9]  
 Hyphens "-"  
 Underscores "\_"  
 Colons ":"  
 Periods "."

**as long as**  
 [:-] is never used

Space between the characters is never used

## FORMS WARNING

Any modification made to a Form attached to the Workflow will still have effect on the original, unless the Form is also saved with a new Internal ID.

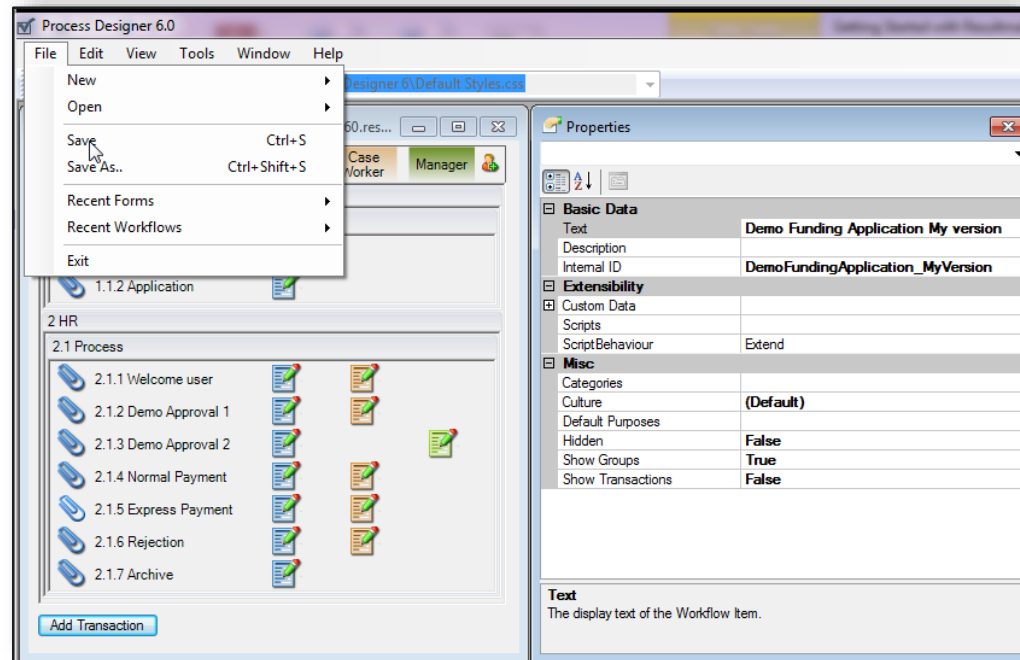
---

Step	Action
------	--------

---

### 3 **Save the Workflow**

When you have entered a new name in the Text field and a new ID in the InternalID field – Save the Workflow by clicking **File > Save** (or Ctrl+S).



---

**-end-**

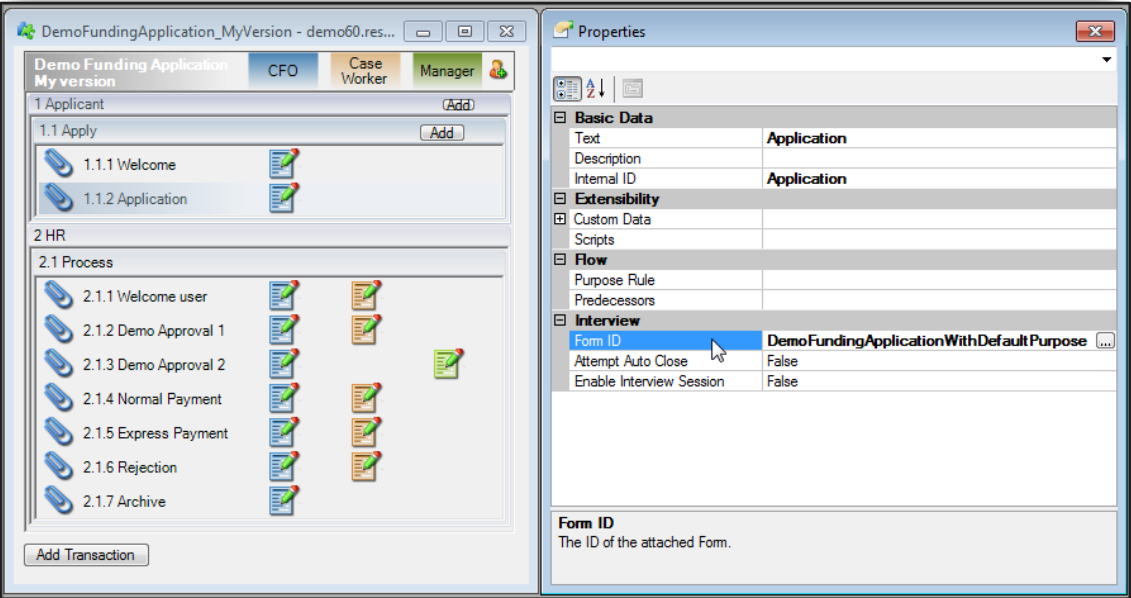
---

***Now the Workflow can be modified without tampering with the original Workflow.***

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 with a new Internal ID. That's what we will do next.

### 4.3 Create a copy from an existing Form and attach it to your Workflow

Step	Action
1	Select a Form In the Workflow Editor, click on an Activity in order to choose the Form attached to the Activity that you want to copy. In this example we will choose the Activity “1.1.2 Application”.



#### ID OF A FORM ATTACHED TO AN ACTIVITY

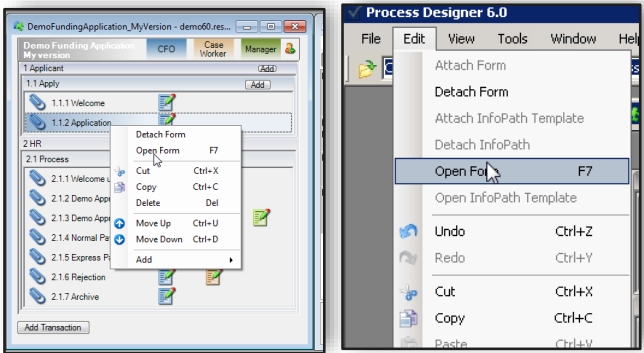
To see the ID of a Form attached to an Activity. Click on the Activity.

The Property Window now displays the properties of that Activity.

The property Form ID contains the unique ID that identifies the Form attached to the Activity.

- 2 **Open the Form**  
In Workflow Editor:  
*Right click on the selected Activity*  
*choose Open Form*  
or click **Edit > Open Form** or press **F7**

*The Form Editor appears.*

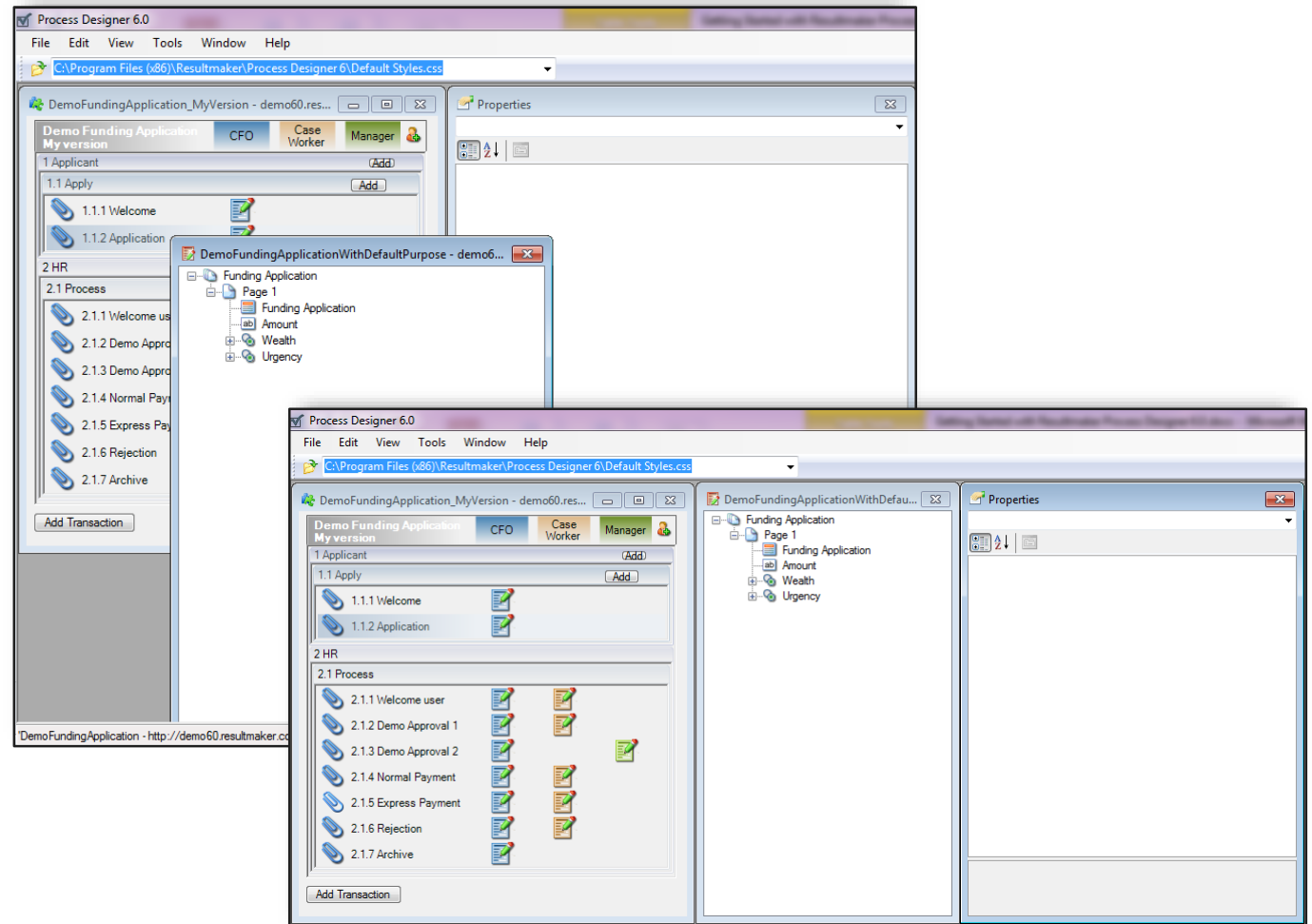


## REARRANGE WINDOWS

The Form Editor might appear on top of the Workflow Editor and the Property Window.

Move the windows: Click and hold down on top of a window and move it.

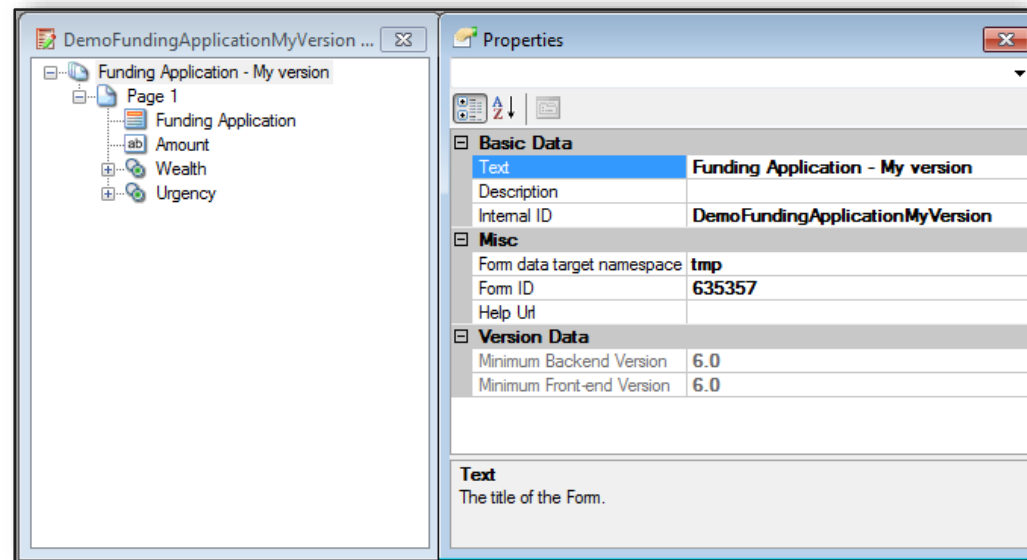
You can also resize the windows.



- 3 **Rename the Form:**  
*In Form Editor click on Funding Application (the name of the Form)*  
*The Property Window now displays the properties of the Form.*

*In the Property Window click in Internal ID*  
*Enter a new ID.*

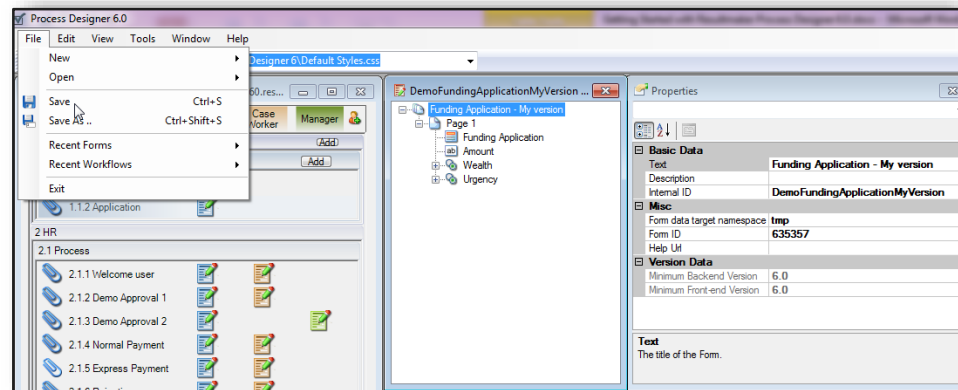
*Do the same for the Text property*



## FORMS AND PROPERTIES

Property Window works the same way for Forms as it does for Workflows. The Property Window displays the properties for the currently selected element of a Form.

- 4 **Save the Form**  
*Click in the Form Editor*  
*Click **File > Save** or press **Ctrl+S**.*  
*The Form is saved with a different Internal Id and name.*



## FORMS WARNING

It is still the original Form with the original name that is attached to your Workflow. To attach the new Form with the new ID and name, first detach the original Form from your Workflow by following the steps below, and then attach the new Form.

- end -

## 4.4 Detaching a Form from a Workflow

Click on 1.1.2 Application in the Workflow Editor. In Property Window the Form ID shows, that it is still the original Form, which is attached to this step.

Step	Activity
------	----------

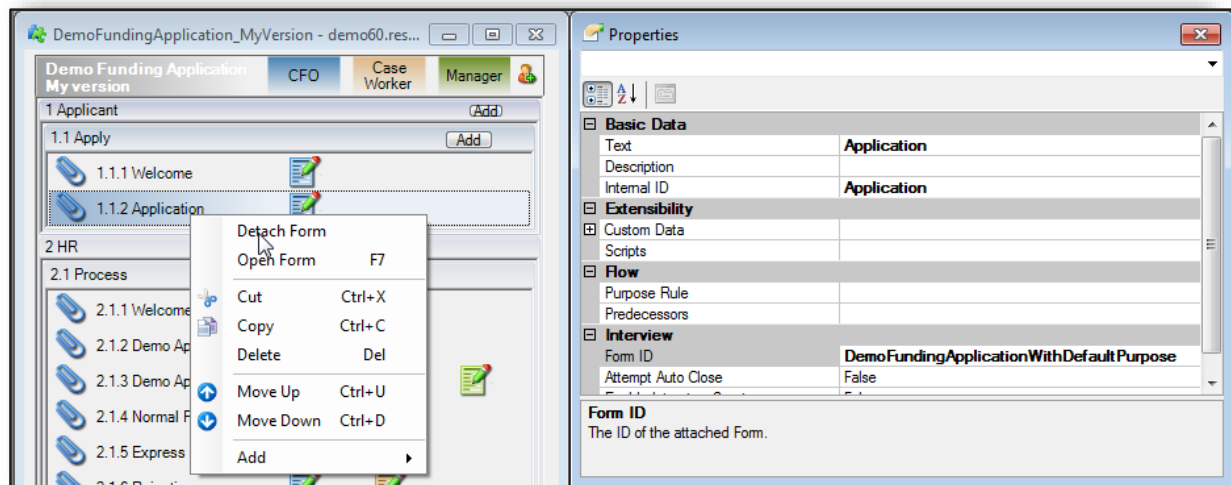
1

### **Detach Form**

*In Workflow Editor*

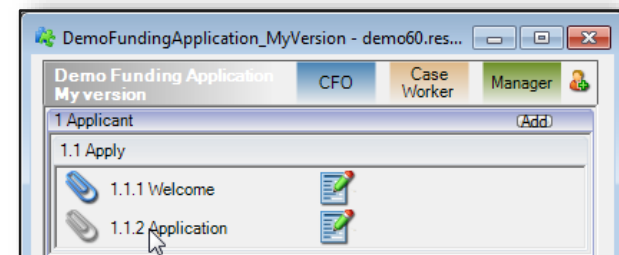
**Right-click** on 1.1.2 Application

**Click** Detach Form.



*The Form is now detached.*

Notice the clip on the step is now grey – indicating that no Form is attached to the Step.

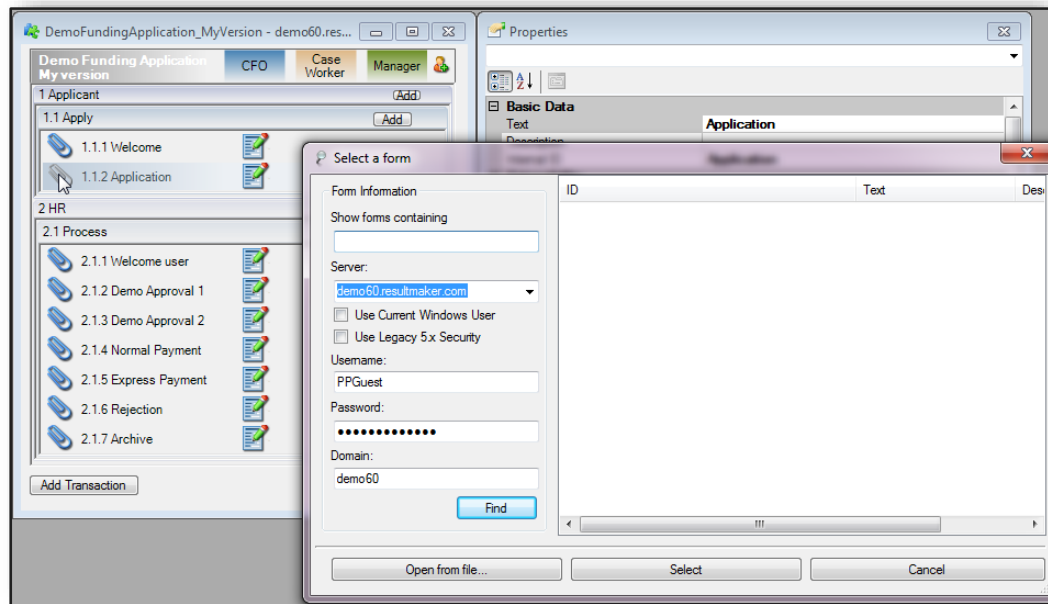


- end -



## 4.5 Attaching a Form to a Step in a Workflow

Step	Action
1	<i>Click on the <b>paper-clip icon</b> on the left of the step. The Selection dialog box appears.</i>



- 2 Specify the server to work from:  
*In Show Forms containing: Type DemoFunding (or the specific ID of new Form. If you don't type anything – and you will get all Forms)*  
In **Server:** Type **demo61.resultmaker.com**  
In **Username:** Type **PPGuest**  
In **Password:** Type **PPpassword123**  
In **Domain:** Type **demo61**
- 3 Click the **Find** button.

## KEEP YOUR STUFF SAFE

The demo server is cleaned /updated once in a while, so if you want to keep your stuff, you should save it locally.

In order to do so:

Open your Workflow / Form

In the menu: Click File > save as

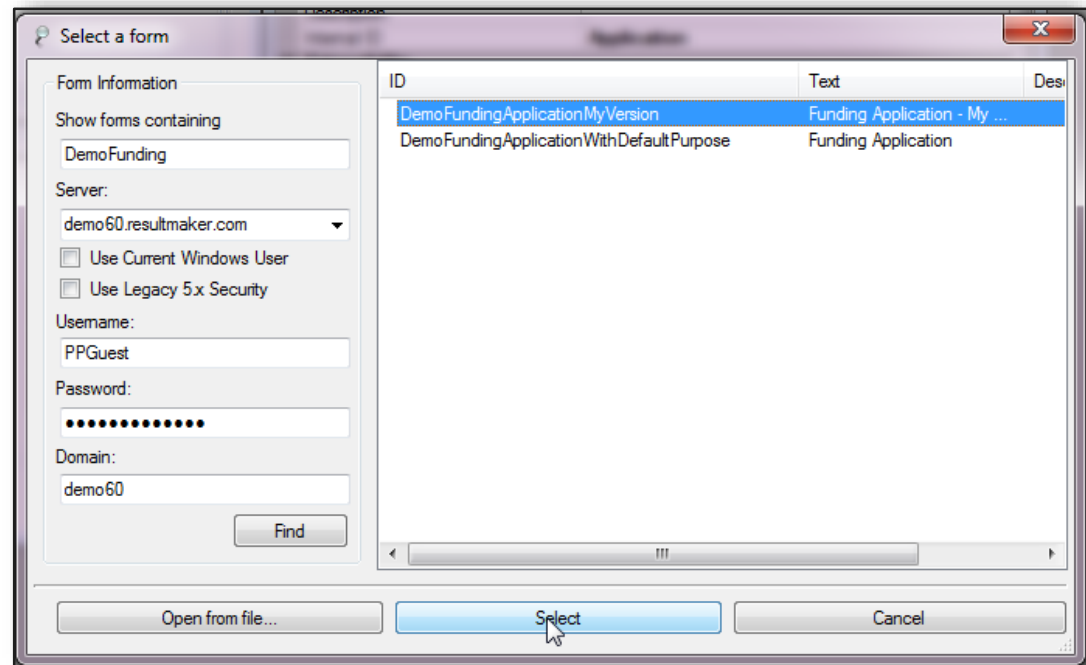
Choose the **File**-radio button

Click **Save**-button

**Browse** to choose a location

Click **Save**.

*A list of Forms appears.*



4 *Click the new Form.*

5 *Click the **Select**-button.  
Save the Workflow (**Ctrl+S** or **File >Save**)*

*The new Form is now attached to the step.*

---

-end-

---

You can now go on modifying your own Workflow and your own Form.

## 5 Creating a New Process and Prototyping

*In this chapter you will learn how to create your first Process consisting of a Workflow and one or more Forms and take a look at Resultmaker's handy Preview feature.*

### 5.1 Preview 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 Editor window is active) and from the Form, in which case the Form will be shown alone in a one-step Workflow containing just itself.

### 5.2 Multiple Roles (participants) and invitations

A Workflow can have several participants - or Roles – as we call them. For Workflows with more than one role, you will always assume the first role, initially named **Role1**.

For the other roles, participants can be invited to assume the roles. To invite a participant you simply **add Invitation Steps** to the Workflow.

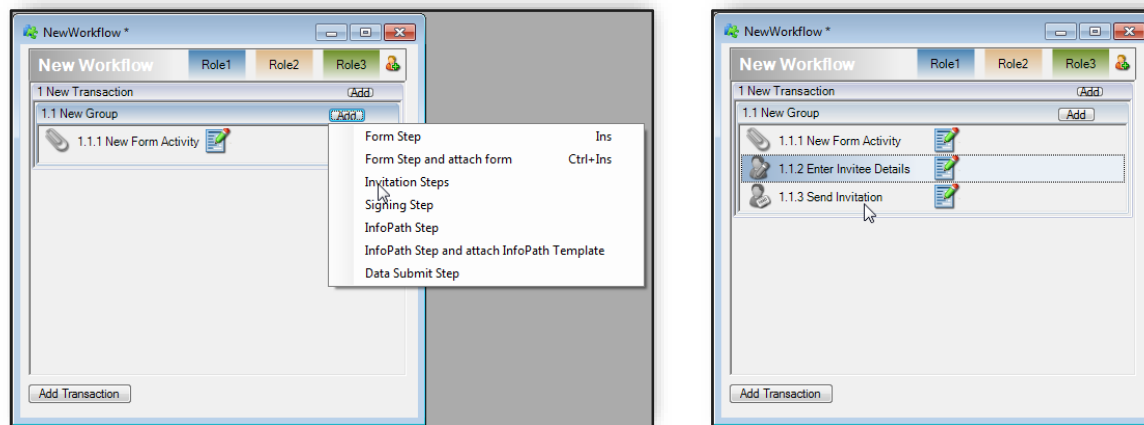
#### PREVIEW – F5

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 Editor window is active) and from the Form (when

#### MULTIPLE ROLES AND RIGHTS – WHILE WORKING

While working on your process it's a good idea to assign Write Access to the first Role, so you can easily go through the whole Workflow assuming the first Role.



Resultmaker Process Designer auto-generates an invitation mechanism, whereby you can specify which users are to play the other roles.

When executing the Workflow Role1 simply specifies the name and email address of the participant to assume each role and an email 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.

The screenshot shows the 'Enter Invitee Details' form in the Resultmaker application. The form is titled 'New Workflow' and 'Enter Invitee Details'. It contains three main sections: 'Information about you', 'Information about participant 'Role2'', and 'Security'. The 'Information about you' section has fields for 'Name/Company' and 'E-mail', both marked with an asterisk. The 'Information about participant 'Role2'' section has fields for 'Name' and 'E-mail', both marked with an asterisk. The 'Security' section contains a text box with the instruction 'To ensure that your invitation is not abused, you must provide a password that the invitee will use to accept the invitation.' and a 'Password' field. Below the password field is a red-bordered box with the text 'Remember to contact the invitee and give him or her this password.' At the bottom of the form are 'Back' and 'Continue' buttons. The Resultmaker logo and tagline 'INNOVATIVE PEOPLE .:. DECISIVE TECHNOLOGY' are visible at the top and bottom of the page.

**resultmaker**  
INNOVATIVE PEOPLE .:. DECISIVE TECHNOLOGY

<< Back to My Workflows

**New Transaction**  
New Group  
✓ New Form Activity  
Enter Invitee Details

**New Workflow**  
Enter Invitee Details

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.

Back Continue

Resultmaker .:. Innovative People .:. Decisive Technology

Figure 2: Entering the invitation details for a Role

By following the link in the email, the user will be taken to the relevant step in the process.

Note: Depending on the configuration of the environment your process is running on,

1. The user might have to log in to get access to the Workflow instance.
2. The user might have to create an account.

On the demo environment this does not happen.

If you specified a password for the invitee, the user will be asked to enter this Workflow-specific password. 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 other user(s) are informed if you specify another password. This protects against unauthorized access by people who accidentally receive the email invitation.

The screenshot shows a web application interface for creating a new workflow. The top navigation bar includes a link to '<< Back to My Workflows' and the user's identity 'User: ACROPOLIS\h...'. A left sidebar contains a menu with 'New Transaction' (selected), 'New Group', 'New Form Activity', and 'Enter Invitee Details'. The main content area is titled 'New Workflow' and 'Enter Invitee Details'. It contains a descriptive paragraph, three form sections: 'Information about you' with fields for 'Name/Company' (containing 'Owner') and 'E-mail' (containing 'owner@resultmaker.com'); 'Information about participant "Role1"' with fields for 'Name' (containing 'User') and 'E-mail' (containing 'user@resultmaker.com'); and a 'Security' section with a password field and a red-bordered reminder box stating 'Remember to contact the invitee and give him or her this password.' At the bottom are 'Back' and 'Continue' buttons.

<< Back to My Workflows User: ACROPOLIS\h...

**New Transaction**

New Group

✓ New Form Activity

✓ Enter Invitee Details

**New Workflow**

**Enter Invitee Details**

This project requires participant 'Role1' to be invited. Here you will provide information about yourself and about the person or company you are inviting, so electronic contact can be established.

Information about you

Name/Company \* E-mail \*

Owner owner@resultmaker.com

Information about participant 'Role1'

Name \* E-mail \*

User user@resultmaker.com

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.

Back Continue

**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](mailto: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](mailto:owner@resultmaker.com).

**Figure 3: An example of the email sent to the user with roles in the Workflow.**

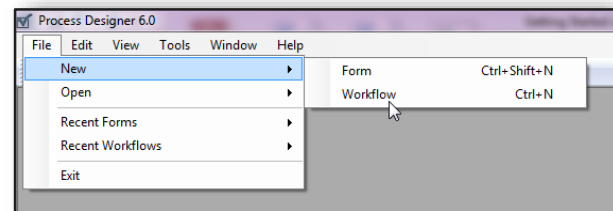
## 5.3 Creating a Process

To create a new process a Workflow and a set of Forms are required. You may design the Workflow without attaching any Forms; in that case, the Process Designer allocates a default Form to all unspecified Form steps.

Step	Action
------	--------

### **Create a New Workflow**

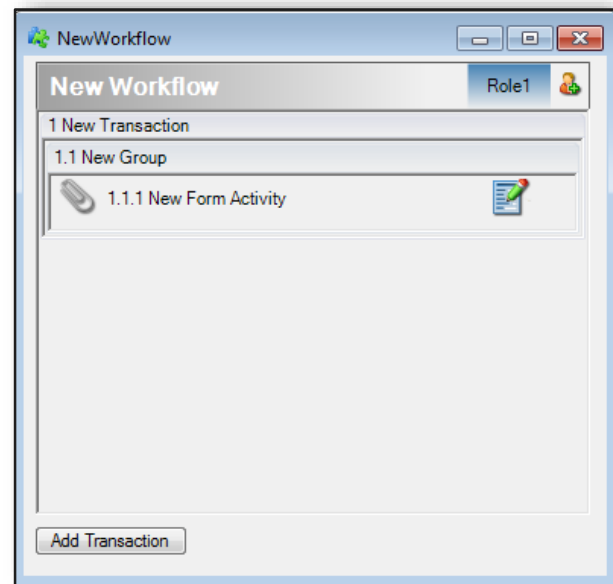
- 1 Click *File > New > Workflow*  
Or  
Click *Ctrl+N*



*The Workflow Editor appears containing a new Workflow.*

The new Workflow by default has one Role and one Form Activity – and the Role has Write Access to the Form Activity.

This is the absolute minimum for a Workflow.



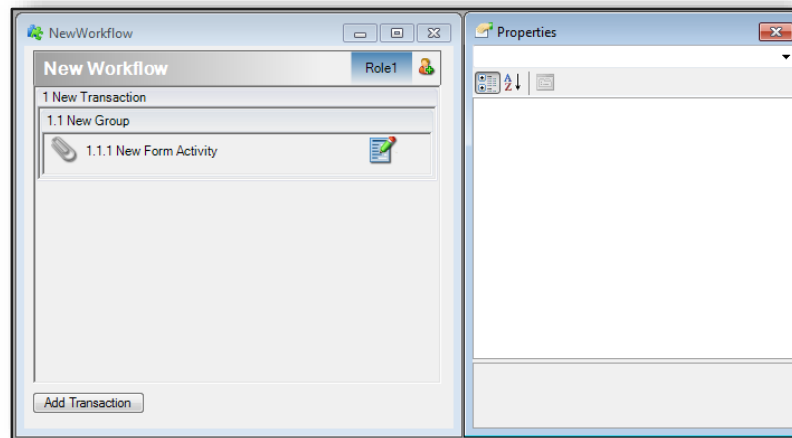
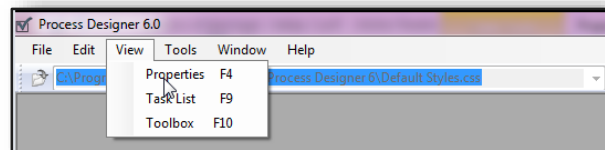
Step	Action
2	<p>Name your Workflow:</p> <p>You should give your Workflow a unique Internal ID (for the system to use) and a display name (what the end user sees).</p>

**Open the property window:**

*press F4*

or

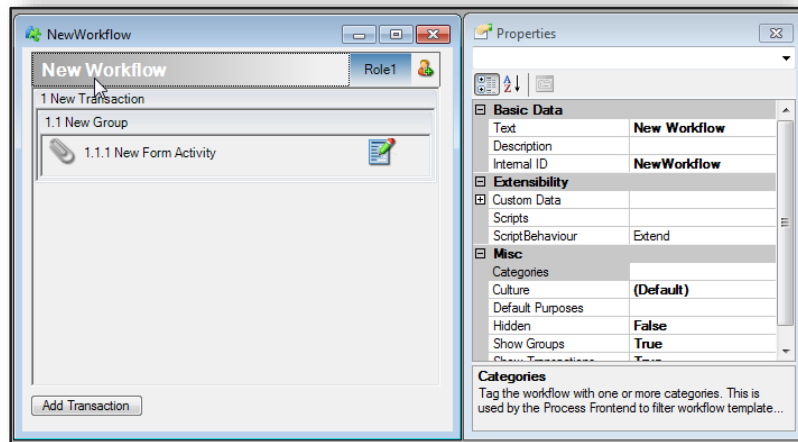
*In top menu select View > Properties.*



**Figur 7: The property window appears empty. Click on an element in the Workflow to see the properties for the element.**

In the Workflow Editor window, click the Workflow name “New Workflow”. *The properties of the Workflow level appear in the Property Window.*





**Figur 8: The property window displays the properties of the Workflow root level.**

- 3 *In Property Window:*  
*Click in Internal ID*  
*Enter a new Internal ID (used by the system to identify the Workflow)*

*Click in Text*  
*Enter the display name (presented to the end user).*

It's optional to write a description in Description property. Description is shown in the Select-window in Process Designer. It can be useful for the designers – it can make it easier to distinguish between Workflows and pick the right one.

- 4 **Save your Workflow:**  
*Press **Ctrl+S**.*  
or  
*In menu: Click **File > Save***

## INTERNAL ID NAMING CONVENTION

Internal ID must begin with a letter [a-z][A-Z] and may be followed by any number of:

- Letters
- Digits [0-9]
- Hyphens "-"
- Underscores "\_"
- Colons ":"
- Periods "."

As long as:

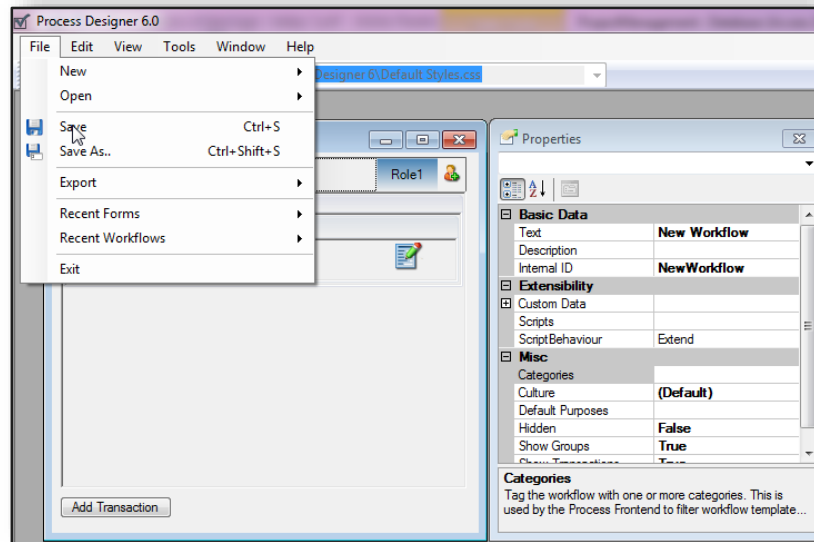
- [:-] is never used
- Space between the characters is never used

---

Step	Action
------	--------

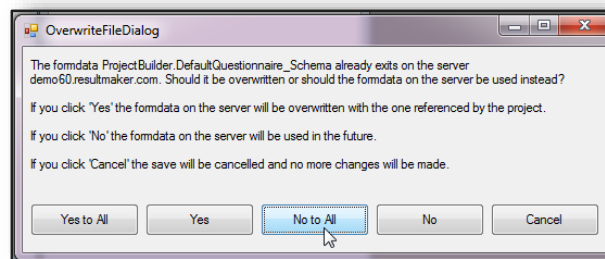
---

*The Save Workflow dialog box appears.*



The first time you save a Workflow an “OverwriteFileDialog” appears.

*Click “No to All”*



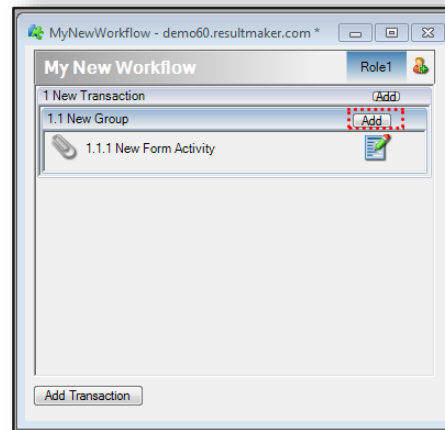
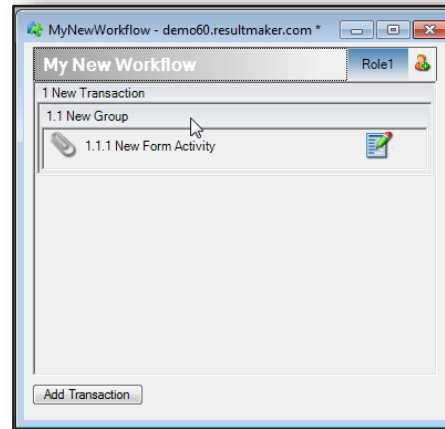
**Now you have created the Workflow. The next thing to do is to create the steps you need.**

## 5 **Add an activity to a Workflow**

### **Add an activity**

*In Workflow Editor:  
Click 1.1 New Group*

*An Add button appears.*



## WORKFLOW LEVELS

Workflows are organized this way:

Level 0: Workflow

Level 1: Transaction

Level 2: Group

Level 3: Step

New steps are always added to a Workflow Group.

The levels are usefull in different ways.

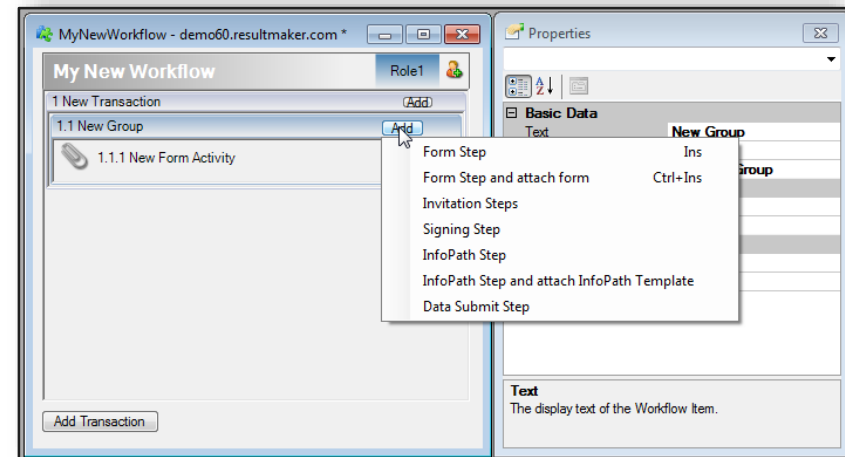
Rules can be applied on all levels.

Workflow menu can be displayed to user showing/hiding Transactions /Groups.

Groups and Transactions can be collapsed etc.

Step	Action
------	--------

- 6      *Click **Add**-button*
- A list box appears*



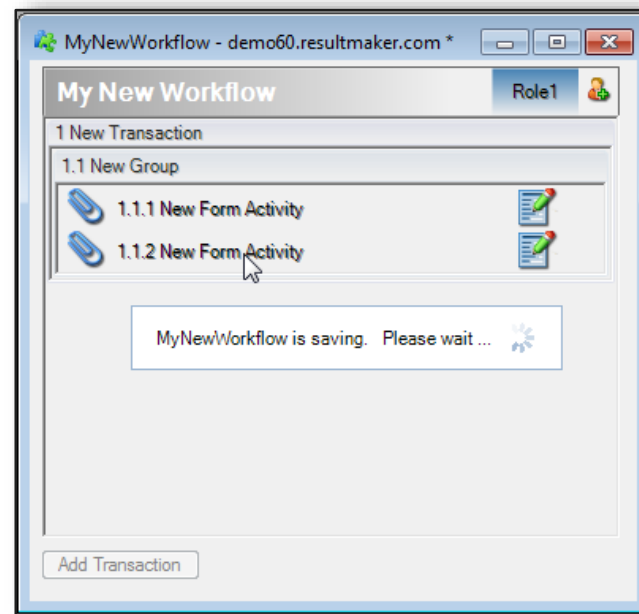
- 7      Select an Activity from the list.  
 In this case, select a Form step. This adds a Form Step but no actual Form to the Workflow. The actual Form will be attached to the Step later.

*Click **Form Step***

*A new Form Step is added in the Workflow Editor*

*Save changes to Workflow:*

*Press **F5***

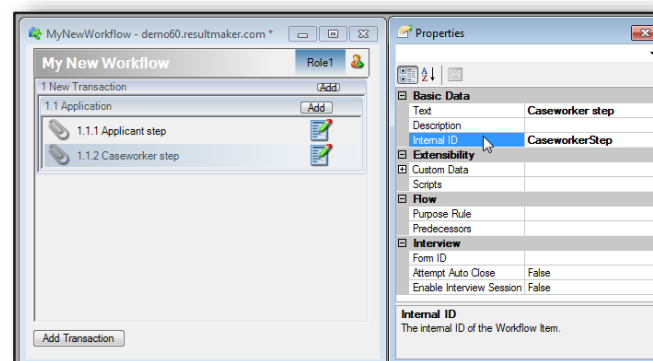


## Rename Activities and Workflow Groups

- 8 To select an Activity or Group:  
*In Workflow Editor:*  
 Click Workflow Element

*In Property Window:*  
 In Internal ID: Enter a new ID  
 (must be unique)  
 In Text: Enter a new Name  
 Press Ctrl+S

Workflow is saved with new IDs  
 and Names.

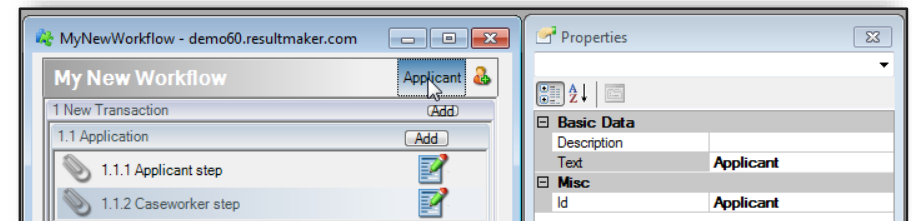
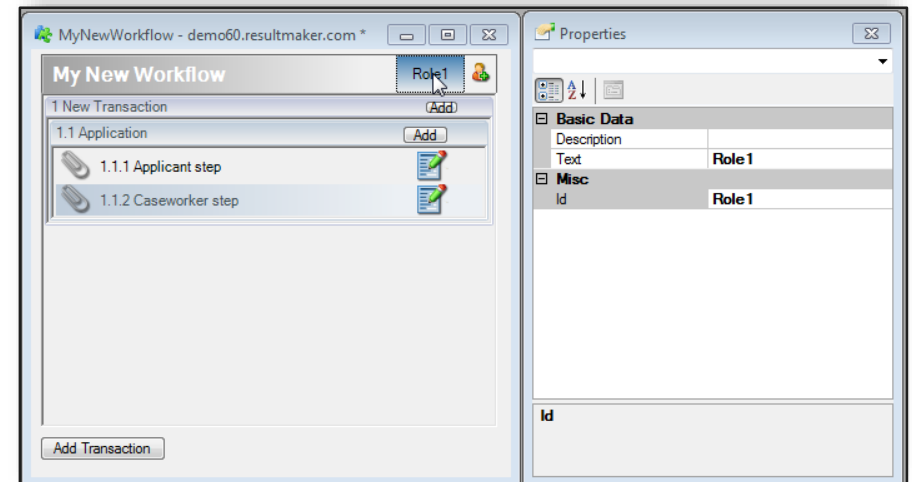


### Rename roles

- 9      *In Workflow Editor:  
Click Role1*

*In the Property Window:  
In Id: Enter a new ID  
In Text: Enter a new name  
Press Ctrl+S*

Workflow is saved with new ID  
and Name for Role



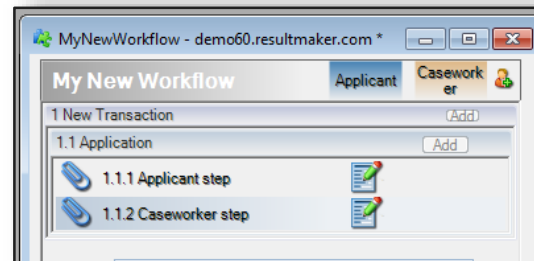
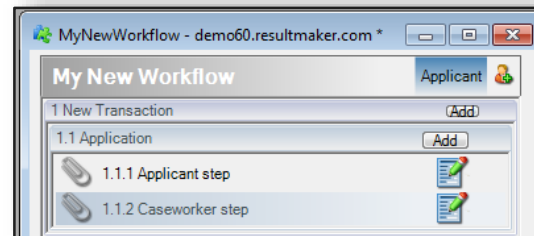
### Add a Roll to a Workflow

- 10 In Workflow Editor:  
Click Add Role-icon

In the Property Window:  
In Id: Enter a new ID  
In Text: Enter a new name

Press Ctrl+S

Workflow is saved with new ID  
and Name for Role

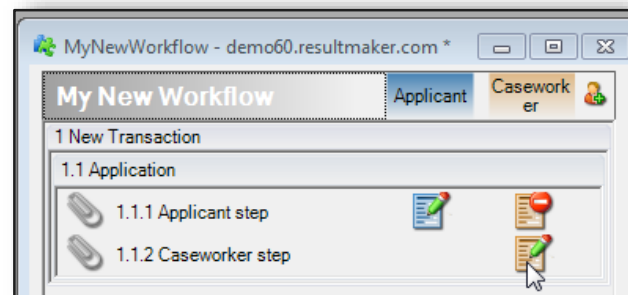


### Assign Rights to a Role

- 11 In Workflow Editor:  
Click inside the invisible grid that  
spans Activities and Roles

An icon appears

Click again to toggle rights



## ROLES AND RIGHTS



Add Role



Write 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.



No Access: The user will not see the step, not even in the Workflow menu.



Read Access (no icon): The user can see the Step in the Workflow menu can select it and see the work area as read only fields, but the user can't act in it.

### Insert Invitation Steps

12

*In Workflow Editor:  
Click on the Role to be invited  
Hold down and drag the pointer  
Drop between the two Form Steps*

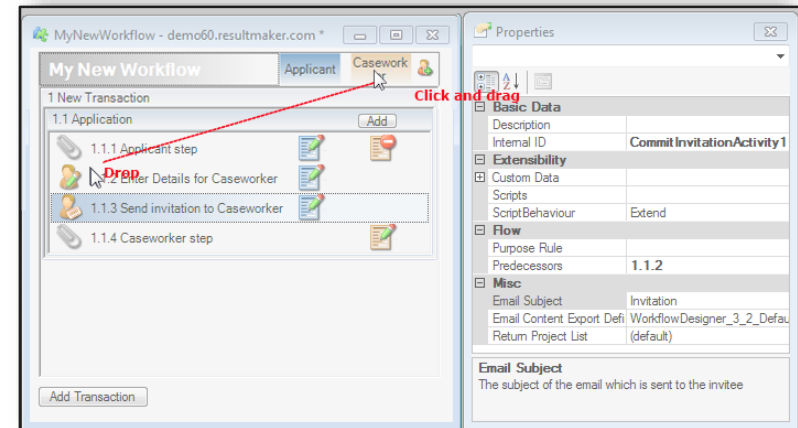
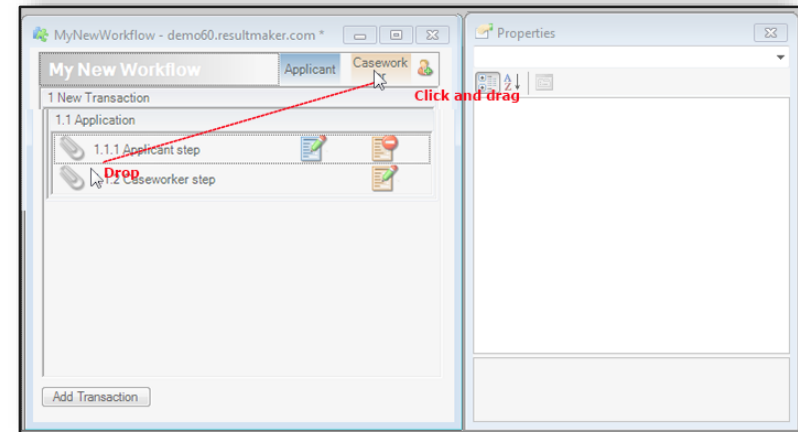
*Save: Ctrl+F5*

*Two new steps numbered 1.1.2  
and 1.1.3 are inserted.*


*The first invitation sub-Activity  
(1.1.2) will be visible.  
The second (1.1.3) is a hidden  
Activity that carries out the  
sending of the invitation e-mail.*

*This second 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).*

*Preview Workflow: Press F5.*







[<< Back to My Workflows](#)

New Transaction

Application

✓ Applicant step

Enter Details for Caseworker

Caseworker step

My New Workflow

Enter Details for Caseworker

This project requires participant 'Caseworker' 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 'Caseworker'

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.

Back

Continue


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## SIGNING STEP

Which data should be signed?

This is specified in the Property Window in the Property **Data Collection Activities:**

This Property specifies the Activities from which data should be collected for signing.

A comma separated list of activities is allowed.

Key in the numbers of the Activities – like:

1.1.1, 1.1.2, 2.3.2

When executing the Workflow, the Role which have Write Access to the Signing Step will be able to sign the data collected in the specified

Step	Action
------	--------

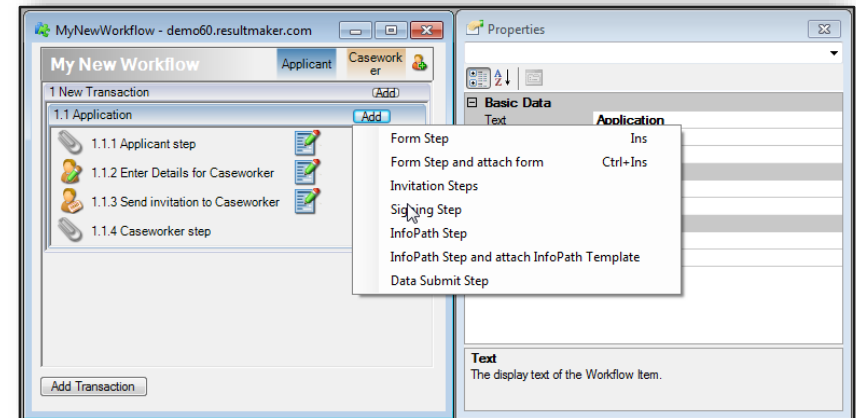
### *Insert Signing Step*

14 *In Workflow Editor:  
Click in the WorkflowGroup*

*An Add button appears.*

*Click **Add**-Button*

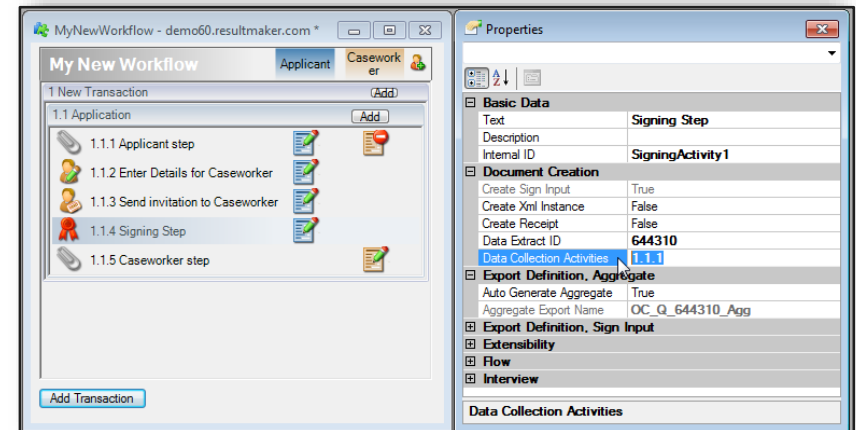
*Click **Signing Step***



15 *In Workflow Editor:  
Drag Signing Step to Position  
1.1.4*

*In Property Window:  
In Data Collection Activities: Enter  
1.1.1*

*On the Signing Step the Role  
Applicant will be able to sign data  
from Form Step **1.1.1 Applicant  
step.***



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

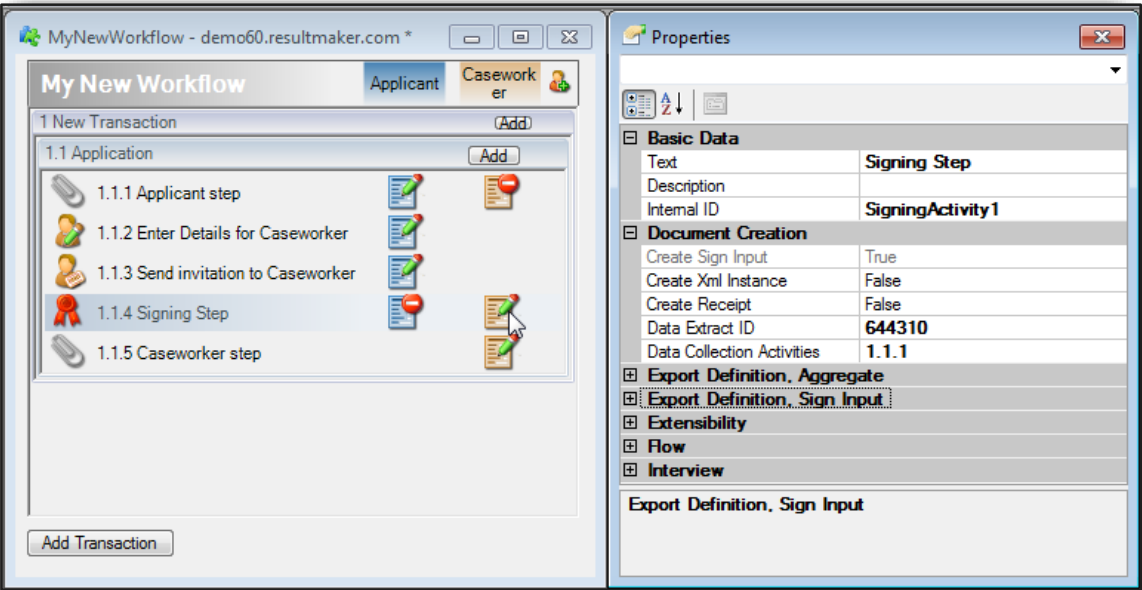


Figure 4: Assigning a role to the signing step

In this case "Caseworker" signs the data that "Applicantf" 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 4.5) for steps 1.1.1 and 1.1.5.

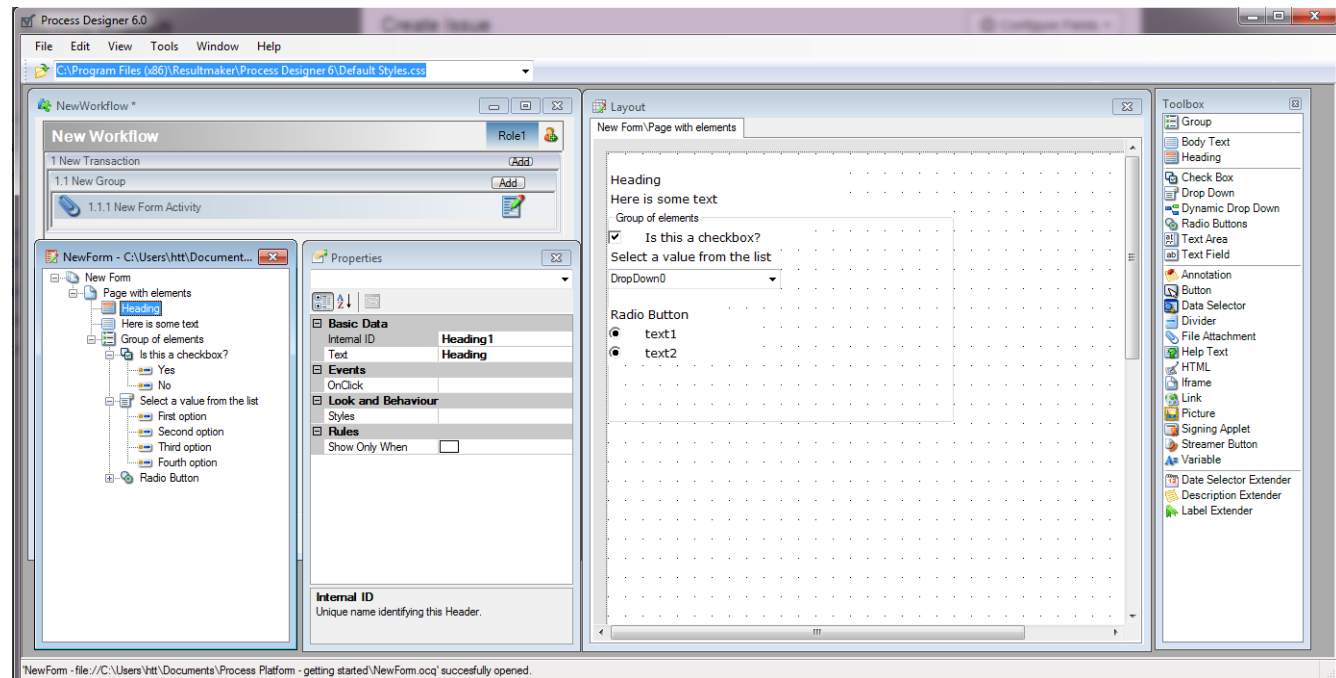
19 To see how your Workflow will look like in an end-user environment, press F5.

-end-

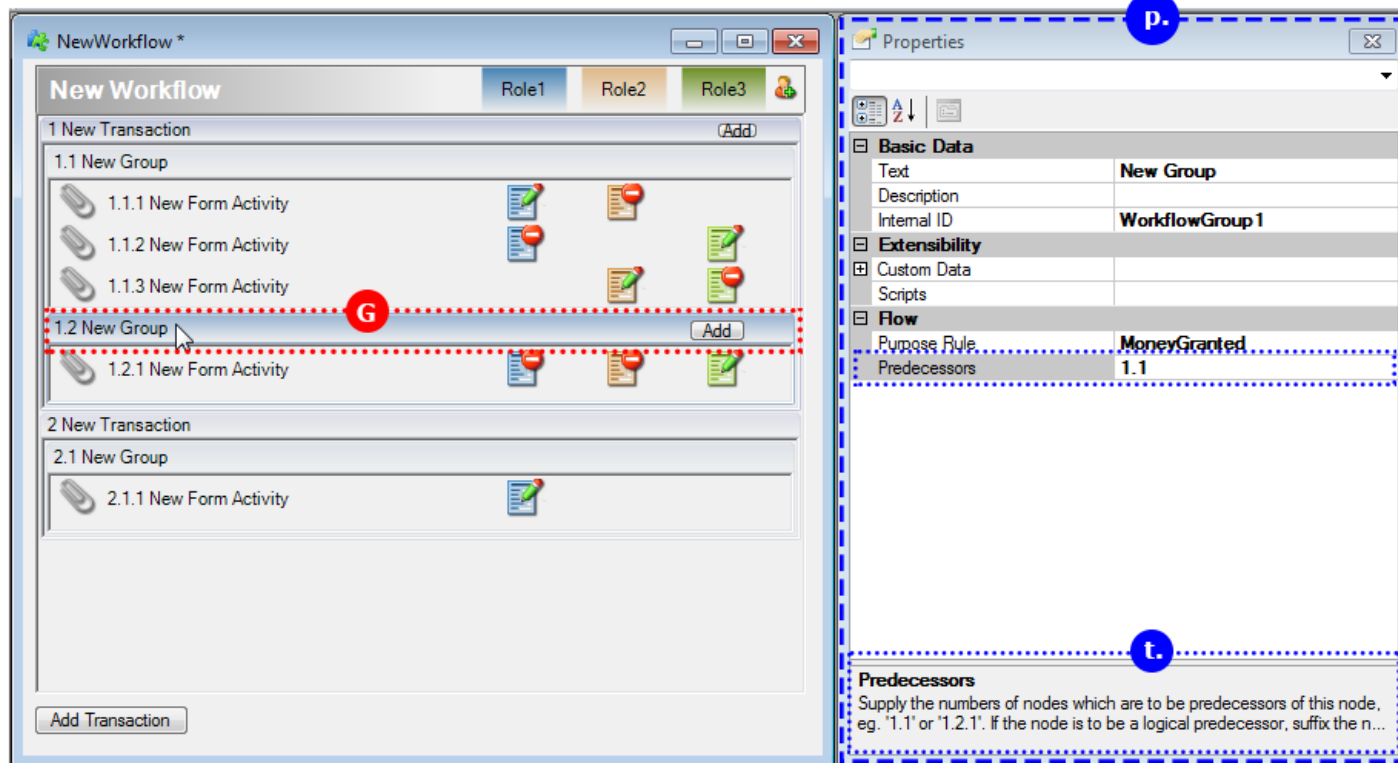
The transaction specification for the signing step is auto-generated by looking into the Form attached to 1.1.1. Transactions are committed when all signing steps within the transaction (the outmost grouping in the designer) have been completed.

## 6 Introduction to the core elements of Resultmaker Process Designer

Resultmaker Process Designer consists of a work area where the core elements are displayed. They can be dragged around and resized as you want. Below the entire core elements are displayed. Usually the Process Consultant won't work with all of them at the same time.



**Figur 9: Process Designer Working Area displaying a Workflow with one Form step, the Form attached to the Workflow, the Property Window displaying the Properties of the Form Element with Internal ID “Heading1”, the Layout of the Form, and the Toolbox displaying Form Elements that can be dragged and dropped to the Form.**



Figur 10: Left: Workflow. Right: PropertyWindow displays the properties of the Workflow Group “1.2 New Group”. The Property Tip displays Tip for the Property “Predecessors”.

## WORKFLOW AND PROPERTIES

What is it?

**G** Workflow Group: Container for Workflow Activities.

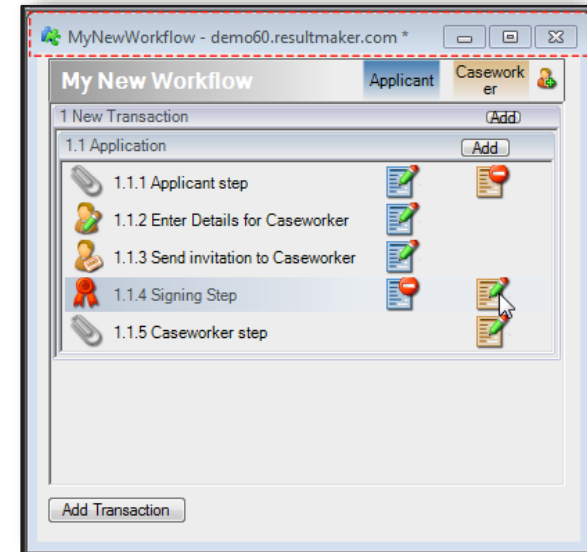
**p.** Property Window: Displays the properties of the currently selected item in the Workflow Editor.

**t.** The bottom area of the Property Window displays a Tip for the currently selected property.

## 6.1 Workflow Editor Elements

### 6.1.1 Internal ID and server

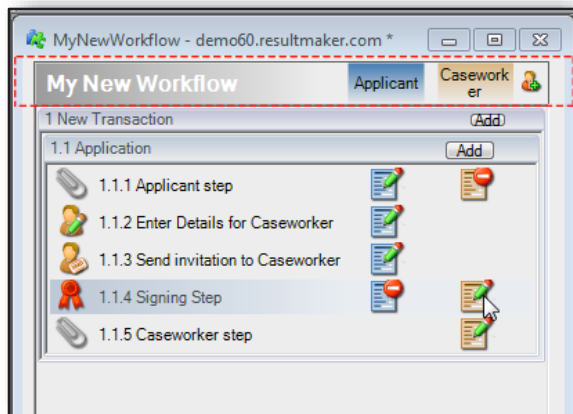
The header of the Workflow Editor shows the Workflow's Internal ID (which is used by the system to identify the Workflow) and the name of the Process server, where the Workflow is stored. The Internal ID is displayed/edited in the Property Window.



### 6.1.2 Display Name and Roles

The next level shows the Display Name of the process (the name that will be displayed to the end user – make it meaningful to end user) and the roles involved in the process (this could be case worker, manager, customer, citizen any role you need to be involved in the process – it could also be a system). The Display Name is edited in the Property window. Roles are added by clicking the icon to the right. Roles are edited (Display Name, Internal ID and Description in the

Property window. Rights are set for each step – see below.



**Click on the Workflow Display Name in order to see the properties for the Workflow.**

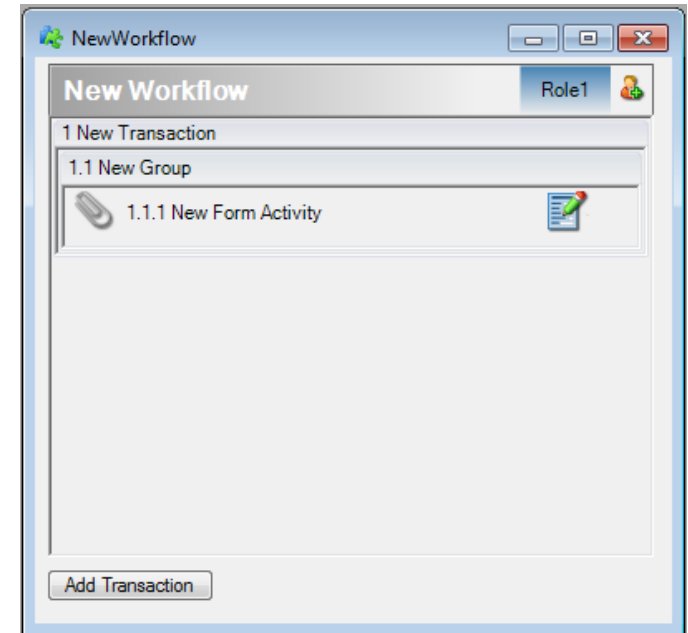
Click on a role in order to see the properties for the role in the Property window.

### 6.1.3 Transactions and groups

The transactions and groups are used to organize the process. A Workflow has as a minimum one transaction, containing minimum one group containing minimum one step. So a Workflow has three organizational levels.

This can be useful fx if the process has many steps and or many roles. Fx you can organize the steps for each user in separate groups.

You can specify rules (Purpose Rules and Predecessors) and add scripts for a transaction or group as a whole instead of specifying and adding them for each step.





You can decide whether the transaction names and group names should be displayed to the user or not. This is done on the Workflow Root Level.

#### **6.1.4 *Purpose Rules and Predecessors***

Purpose Rules are rules telling when (not) to show an Activity depending on what has happened on previous steps in the Process.

Predecessors tell which Steps, Groups, and Transactions should be performed before the user is allowed to perform the current Activity.

### **6.1.5 Steps and Activities**

Steps are placeholders for the Activities in the Process. There are four different kinds of possible Activities.

- Form Activity (a Role fills out a Form)
- Invitation Activity (includes two steps – one step to enter information about inviter and invitee and one step to send invitation)
- Signing Activity (A roll signs a selection of data from the Workflow)
- Data submit Activity (a selection of data from the Workflow is submitted)

### 6.1.6 Rights

For each step the rights are defined for each role. A role can have

- Write access
- Read access
- No access

Role1 has write access to step 1.1.1, 1.1.2, and 1.1.3, and no access to step 1.1.4 and 1.1.5. Role2 has write access to 1.1.4, and no access to 1.1.1, 1.1.2, 1.1.3, and 1.1.5. Role3 has write access to 1.1.5 and read access to 1.1.1, 1.1.2, 1.1.3, and 1.1.4.

#### WHAT IS IT?



Roles with rights assigned



Add Role Icon: Click this icon to add a new Role to the Workflow.



Write Access: The first role by default has Write Access to all new Steps. Click the icon to toggle rights (Write Access, No Access, Read Access).



No Access: The Role has no Access to the step.



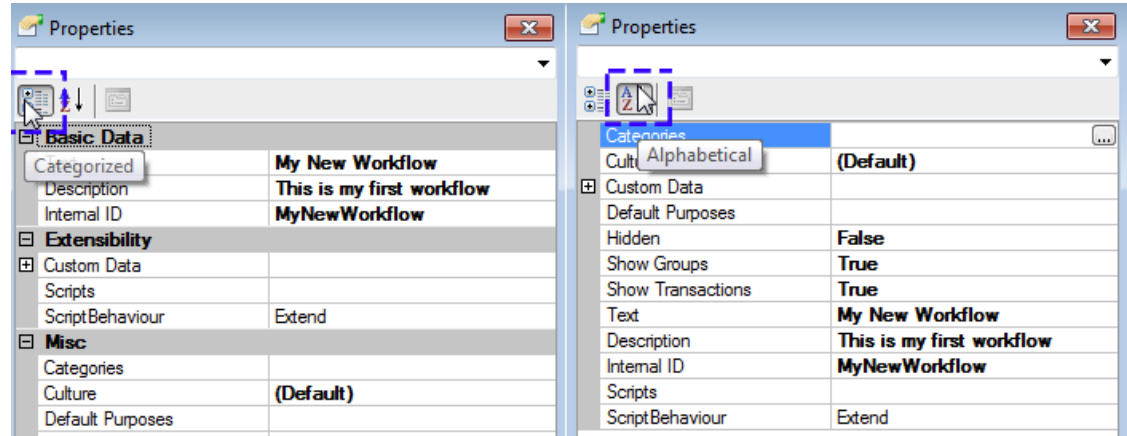
Read Access: If no icon is displayed the Role has read access.

## 6.2 Property Window Elements

The Property Window displays the properties of whatever element is selected in the Workflow Designer or Form Designer. Most of the elements of the Property Window are changeable. Few are not.

### 6.2.1 Order of Properties

You can choose to have properties sorted by category or Alphabetical. Click the icons in the top of the Property Window to choose categorized or alphabetical.



The bottom part of the Property window has a small description of the currently selected property. In the case of the Property window TIP described below the Property window, the Description Property and Predecessor property.

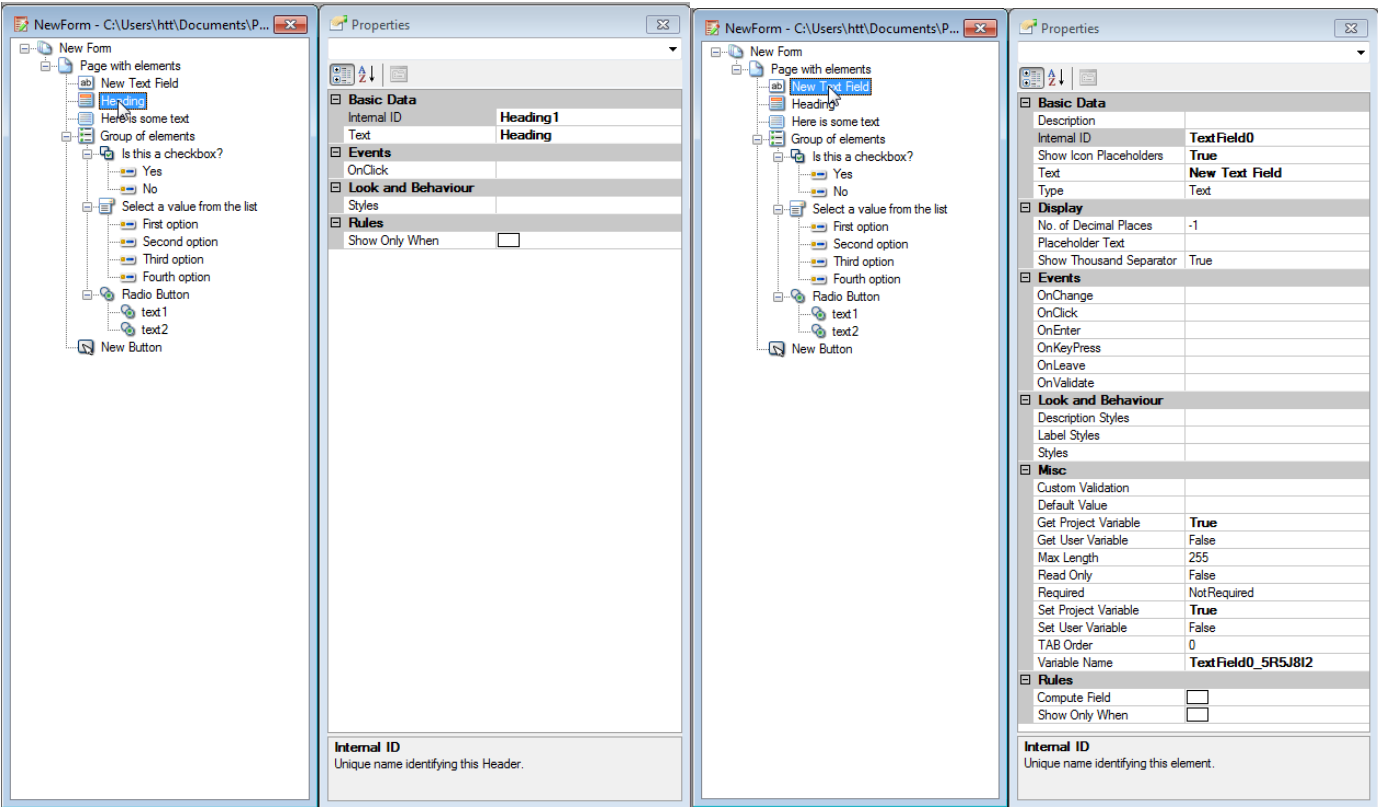
6.3.3 The Group Element

Group elements are used for layout purposes but also for other purposes. Fx you can show / hide a group and its elements as a whole instead of showing/hiding each single element in the Group.

6.3.4 Form Element Properties

The different Form Elements has different properties. The properties are displayed / edited in the Property Window. It works just the same way as for Workflows.

Below is shown properties for a Heading element and a Text Field element. You don't have to worry about them all in order to create a Form. It just gives you a lot of possibilities to add functionality to your Form without writing any code. So don't worry!



### 6.3.5 Form Layout

In order to control the layout of the Form open the Layout Editor and resize and drag the elements around.

Preview: In order to preview the layout, click in the Form Editor and press F5.

Its that easy to create the layout of the Form.

