

DOCUMENTS WORKFLOW User Guide

VERSION 2.0

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Table of Contents

1.	The Workflow Document	4
1.1	Preliminary Remarks	4
1.2	Open new document	4
1.3	Opening already existing workflows after initial installation	5
1.4	Customize file locations	5
1.5	UTF-8 support	6
1.6	Workflow shape	7
2.	Working with Drawing Elements	18
2.1	Start node	18
2.2	Control flow	18
2.3	Action	21
2.4	End node	22
2.5	Moving shape texts	23
2.6	Grouping shapes	24
3.	Workflow Element Specification	25
3.1	Action	27
3.2	Control flow – Operation - Escalation transition	42
3.3	Send Signal	53
3.3.	1 Type	54
3.4	Receive Signal	60
3.5	Subworkflow	61
3.6	Delay shape	63
3.7	Simultaneous sequence and synchronization	66
3.8	OR branches and synchronizations	69
3.9	Merge - Decision	72
3.10	0 Start node	76
3.11	1 End node	78
4.	Export and File Type Mapping	80
4.1	Export	80
4.2	Error messages during export	80
4.3	Workflow file type	82
4.4	Release workflow	84
4.5	Download workflow	84
4.6	Workflow HTML and image	85
5.	Index	86
6.	Table of Figures	90

1.1 Preliminary Remarks

Please consider the notes on *installation prior to creating a workflow*.

If you are working on the system as a "user" with limited access or as "domain user" rather than via administrator or power user rights, you will have to start the "**Initial startup**" shortcut prior to initial startup.

In case of problems, also read the "Readme.txt" file stored in the installation directory; it contains notes and explanations, in the form of "questions and answers", to the behavior of the "Documents Workflow COM-Add-Ins".

1.2 Open new document

You create a new Workflow document by clicking the shortcut to the document template from your program menu (Fig. 1).



Fig. 1: Links on the program menu created by the installation

1.3 Opening already existing workflows after initial installation

If a workflow has been installed in a different directory on initial installation, the "WorkflowSet.vss" stencil for previously created workflows cannot be found because it points to a different directory. Microsoft® Visio® then opens the workflow without the stencil (shapes).

To connect the document in **Visio® 2002** to the stencil, on the main menu, choose the "*Open stencil*" entry via *File* and "*Stencils*". In **Visio® 2003/2007** you choose the "*File -> Shapes -> Open stencil*" menu items. On **Visio® 2010**, you choose the "*File -> Open*" menu items.

You then navigate to the installation directory, where you choose the "WorkflowSet.vss" stencil. When clicking "*Open*" the document is connected to the stencil. To ensure the connection is permanent, you should then save the workflow.

1.4 Customize file locations

To ensure that stencil and document template can always be retrieved, you should enter your locations in Visio (Fig. 2).



Fig. 2: Customize file locations for stencils and templates on Visio 2010 "File -> Advanced -> File locations -> Templates and Stencils path"

1.5 UTF-8 support

Workflow version 2.0 or later, server version DOCUMENTS 4 (UTF-8) and **Visio® 2003** support displaying UTF-8 characters. When submitting a DOCUMENTS 4 server without UTF-8 support, UTF-8 character representation is supported, but the data will not be encoded in UTF-8 during export. Generally, no UTF-8 can be used for technical names. UTF-8 fields are:

All shapes:

- Description
- Label
- When available in the dialog, the values for field values

Action

- Comment
- Task
- Recipient
- Escalation To From mail subject mail text

Control flow

- Confirmation message
- Visibility condition
- Guard condition
- Guard error message
- Comment

Receive Signal

- Escalation To From mail subject mail text
- Comment
- Condition

Send Signal

- Escalation To From mail subject mail text
- E-mail Recipient Sender Subject Content
- Comment

1.6 Workflow shape

Each document created from this template has a *workflow shape* that has already been inserted. This shape is used, among others, to control communication to the DOCUMENTS 4 server; lists are managed, i.e. data is synchronized, and language settings are made. Each workflow must have exactly one workflow shape because information is stored in it which is accessed by other shapes.

You can delete the workflow shape at any time, and dock a new one on the drawing sheet. Positioning the shape on the sheet is performed automatically (Fig. 3).



Fig. 3: Workflow shape with context menu

You can edit the workflow shape by double-clicking or by starting the context menu entry "*Documents Settings (Properties)*" entry (Fig. 4). The details dialog that appears then allows you to specify the workflow in greater detail.

DOCUMENTS WORKFLOW Version 2.00	×		
Label Workflowname			
Name Workflow_1	Version 1		
General Description	1		
Language 🔿 German 🛛 🕫 English			
Shape-Text GUI-Label (all)	-		
Write shape autocomments			
Remove exclusive write lock			
Release			
File Type ItInvoice	•		
Import from Documents]		
Export to Documents]		
Download			
Create new workflow version]		
Ok Cancel			

Fig. 4: The Workflow details dialog

Each workflow requires, on the server side, an existing and released *file type* to

which it refers and whose fields it uses. In the DOCUMENTS Manager you will find the list of all file types under "*Documents -> Filetypes*" (Fig. 5).



Fig. 5: File types in DOCUMENTS

If you type the text "*ftInvoice*" in the dialog box "File type" and start data import from the server via the "*Import lists*" button, all fields marked by the file type, as well as the appended tabs, will be determined, and processed for Visio[®].

If you cannot enter a specific file type because, for instance, you do not know its name, you will be prompted during list import on whether you want to perform the update anyway. You need to click "*Yes*" to confirm this prompt.

You can select the file type then by re-opening the workflow shape from the drop-down list. Only the released file types are entered in the list.

Import lists

Because actions are assigned to specific users, groups, etc. in the workflows, this data must be fetched from the server. In doing so, you need to log on to the server via the corresponding login dialog (Fig. 6).

🖳 Login		×
Connection-		
Server	localhost	
Port	11000	
User		
Name	schreiber	
Password	****	
Principal	peachit	
Connect	Cancel	

Fig. 6: Login dialog

The corresponding account must be set up on the server for the user prior to this. Import is performed after successful login. The connection data (server, port, name and principal) is saved in the workflow, so you do not need to re-enter it upon renewed login. When you reopen the workflow shape, you will find that all file types the server is aware of are entered in a drop-down list. When changing the selected file type you should also perform list import again because the new fields and tabs coupled to the file type are transferred as part of the import. As part of list import, the names of the existing workflows, the names of the released archives, public folders and Java scripts as well as document templates and tabs of the file type are also determined (Fig. 7).



Fig. 7: Performing list import from DOCUMENTS

Workflow label and brief description

On reopening the workflow shape (Fig. 8), you can assign the workflow a multilingual *label* that is also displayed in the shape text. See also the "*Multilingual* labels" section. You can also specify a brief description about the workflow's respective business process. All double quotes in the workflow description text are replaced with single quotes on saving the workflow shape.

Workflowname Insert a description	_
DOCUMENTS WORKFLOW Version 2.00	×
Label Workflowname	
Name Workflow_1	Version 1
General Description	
Insert a description	

Fig. 8: The Workflow details dialog including the "Label", "Name" and "Description" fields

Create a new workflow version

Use this function if you want to re-transfer a workflow without overwriting the old workflow on the server. By pressing this button, new "IDs" for the workflow and the shapes it contains are generated. Based on these IDs, the server recognizes whether the workflow or its elements already reside in the database.

In addition, the version number is incremented by one level (increments of tenth/ one). You can also overwrite these by entering a different number. Please consider that changing the version number alone is not enough to create a new version because the "IDs" are not changed here.

Also be aware that the old or new version's document files (Visio[®]) are not saved when the version is created. So, you should save the file via "File \rightarrow Save As" and by giving it the corresponding name. The changes made as part of creating the version cannot be undone.

Change workflow label

When changing the workflow label, you will be prompted, on saving the dialog, on whether only a label change or a workflow copy should be created where the version number is set to the value "1". In the latter case the IDs of the workflow and its components are changed, as when creating a new workflow version.

Change workflow names

When changing the name of the workflow, i.e. the technical workflow name, all IDs of the workflow and its components will be automatically changed.

Shape comments

By enabling the *Write shape autocomments* option (version 1.3.4 or higher) on the workflow shape, the corresponding comments displaying, among others, a summary of the set *escalation levels* with *actions* and the *guard* or the like with *control flows* are created for all shapes of the active sheet on saving the dialog (Fig. 9).

Besides the *technical names,* the interface labels for the individual portal languages are listed. Display therefore is arranged as follows: If you have allocated a general label, e.g. "*Action*", this will be used for all languages.

If you allocate a label for a specific language, e.g. "*en:Action;*", the technical name will be displayed in the other languages unless these also have a label.



Fig. 9: Automatically generated shape comments

The shape comment might not display all information because the Visio comment field can only accept limited information and can only be influenced up to a point. The comment that is displayed as a *tool tip* will appear when you roll over the corresponding shape using the mouse, and briefly pause there. For reasons of downward compatibility, the Default setting is *disabled*.

When this option is enabled, shape comments that already exist in the workflow will be overwritten. So, you should not enable this option if you have already placed your own comments on the workflow and its shapes!

Remove exclusive write lock

If a user locks the DOCUMENTS file because they are responsible for the current workflow step, they have exclusive write permissions to that file. In version 1.3.6 or later, this default behavior of the workflow can be changed by enabling the "*Remove exclusive write lock*" for the entire workflow (Fig. 10). The DOCUMENTS file can then be edited by another user if that user has the necessary permissions.

DOCUMENTS WORKFLOW Version 2.00	×			
Label Workflowname				
Name Workflow_1	Version 1			
General Description				
Language C German 📀 English				
Shape-Text GUI-Label (en)	•			
Write shape autocomments				
Remove exclusive write lock				
E Release				
File Type	•			
Import from Documents				
Export to Documents				
Download				
Create new workflow version				
Ok Cancel				

Fig. 10: Remove exclusive write lock for the entire workflow

Changing write protection in the workflow shape impacts on the entire workflow for all workflow elements belonging to the following types:

- Delay
- Action
- Receive Signal
- Send Signal

For each of these elements you can define behavior deviating from the overall workflow in the related details dialog (Fig. 11).

Action				
Label Action				
Name Asian 5				
General Exception Eight Values Eight Tabled Dages Connections Description				
Processing				
Type 📀 Static 🔿 Dynamic Processing by alias/role 📃				
Recipient				
AuthorizedSignatory				
Overseer				
Registry				
ServiceManager				
Exclusive write lock workflow				
workflow				
Direlau don't remove				
Task				
Comment				
Upen in edit mode Chara Astron Est				
E Show Action list				
∫ Show Copy list				
Expenditure 1				
Ok Cancel				

Fig. 11: Exclusive write lock on an action

Write protection of the affected element may follow the workflow setting "*workflow*", or it can be explicitly "*removed*" or "*not removed*" for this element regardless of which setting has been made for the workflow per se (Fig. 12).

🗏 Receive Signal 🔀	Send Signal X
Label Receive Signal Name Receive Signal_2 Common Escalation Field Values Connections Description	Label Send Signal Name Send Signal_3 Type John Comment
Exclusive wite lock	Exclusive write lock workflow
	Action Action Action Action Action Name Action_13 General Escalation Field Values Fields Tabled Pages Connections Description Processing Type & Static C Dynamic Processing by also/hole Processing Authorized/Signatory Oversear PersonnelManager Recipitry ServiceMenager Recipitry ServiceMenager Recipitry ServiceMenager Recipitry ServiceMenager

Fig. 12: Exclusive write lock for "Send Signal, Receive Signal, Action and Delay

Shape text

As of version 1.3.4, the shape text displayed on the Visio drawing in or next to the shape can be influenced in its appearance in such a manner that the *label* (*ergonomic name*) text or the *name* (*technical name*) can be displayed (Fig. 13).

DOCUMENTS WORKFLOW Version 2.00	×
Label Workflowname	
Name Workflow_1	Version 1
General Description	1
Language 🔿 German 💽 English	
Shape-Text GUI-Label (en)	~
Write shape autocomments	
Remove exclusive write lock	
Release	
File Type	•

Fig. 13: Details dialog for workflow shape version 1.3.4

When selecting the *technical name (filtered)* setting, the technical name will only be made visible when the shape has a label. The individual languages for which interface labels can be allocated are determined on capturing the server lists.

These must be specified via the DOCUMENTS Manager with the respective principal (Fig. 14).

DOCUMENTS Manager User Administrator (Peschill DeMOPORTAL) (Doctroz 1000) Application Server settings Administration Documents Help				
Թ Neve 💍 Edit 👌 Update 兴 De	late 🚔 Print 🚮 Configure			
Administration			9	
Administration	Search call text columno	* *	v v 🗑 🖼	
Documents	Abbreviation Carrier	Skeel	Dip/Town Zp/Post code	
	peachit PeachIT DEMOPORTAL	Birserweg 15	00011 Gatervitadi	
Peachit (PeachIT DEMOPORTAL) - Portal				
Settings Administration Mail Service Properties				
Portal carrier / Principal		Portal Language(s)		
Abbreviation peachit	Portal version 7,00	Language 1 Deutsch	Locale de 💟 Online	
		1	Lauda III Outra	

Fig. 14: Specifying the portal languages in the principal dialog

The Workflow dialog then lets you select the language to be displayed in the shape text.

When selecting the *GUI-label (...)* representation (Fig. 15), the *guard*, visibility condition or, as with escalation, the set time will be displayed in control flows and operations with an empty name.

Language	O German 💿 English	
<u>S</u> hape-Text	GUI-Label (en)	
	Technical Name Technical Name (filtered) GUI-Label (all) GUI-Label (de) GUI-Label (en)	

Fig. 15: Selecting the GUI-Label of the shape text in the Workflow dialog

The setting (*Technical Name/GUI-Label*) can also be switched via the workflow shape's context menu (Fig. 16).

~	Import Lists from Documents
~	Documents Properties
~	Export to Documents
4	Show GUI-label or technical name

Fig. 16: Switching display mode via the workflow shape's context menu

When switching to "*Show GUI-label*", the switch is made to the respectively set GUI-label of the Workflow dialog. If no GUI-label is selected there, the "*GUI-Label (all)*" will be used.

Export

For a description of performing export on the workflow shape, see chapter 4 below.

Release

By enabling the *Release* option, the workflow is automatically released in the system after exporting it.

Download

A detailed description of downloading workflows (see button in Fig. 10) can be found in chapter 4.5.

2. Working with Drawing Elements

The individual workflow elements are - typical in Visio[®] - transferred from the stencil to the drawing sheet using Drag & Drop. You can create a workflow per drawing sheet, where the Visio[®] document file may contain multiple drawing sheets. To enlarge or reduce the drawing sheet, position the cursor at the edge of the sheet, keeping the Ctrl key depressed.

2.1 Start node

Each correctly working workflow has exactly one *start node*. In addition, the start node may only have exactly one outgoing connection; incoming connections at the start node are not allowed. The red color of the shapes refers to the corresponding connection error.

2.2 Control flow

Next, dock a *control flow,* and then connect it with the *start node*. When this snaps in at the start node, the warning color on the node should disappear, and the following picture, as shown in Fig. 17 emerges.



Fig. 17: Insert control flow

If you want to accurately draw straight connection lines, you press the Shift key (see Fig. 18).



Fig. 18: Dragging at the end point, keeping the Shift key depressed

You can also make connections at right angles by moving the control flow shape on the blue handle (Fig. 19).



Fig. 19: Simple dragging at the handle for rectangular redirections

If you press the Shift key at a handle with a selected control flow, you can create rectangular bulges (Fig. 20).



Fig. 20: Dragging at the handle, keeping the Shift key depressed

Dragging, keeping the Ctrl key depressed, ensures right-angle connection lines. Connect the action shapes directly with the control flow and, keeping the Ctrl key

depressed, drag it until a right triangle emerges (Fig. 21).



Fig. 21: Dragging at the handle (Control flow center), keeping the Ctrl key depressed, for right-angle connection lines

You can also adjust line routing, keeping the Ctrl key depressed (Fig. 22 and Fig. 23).



Fig. 22: Dragging at the top right handle, keeping the Ctrl key depressed, until the dotted line has the desired shape.



Fig. 23: Dragging at the bottom right handle, keeping the Ctrl key depressed. The dotted line indicates the new line routing.

All changes that you create by dragging can be undone by dragging into the opposite direction analogous using the same keys.

2.3 Action

Now dock an *action* shape on the drawing sheet, and let it snap in at the control flow (Fig. 24).



Fig. 24: Storing and connecting start node, control flow and action

Action shapes require at least one incoming and at least one outgoing connection. Select the existing control flow by clicking it. Then select the action, keeping the Ctrl key depressed. This *multiple selection* allows you to insert multiple elements via Copy & Paste into the drawing sheet (Fig. 25). When copying created shapes, specifications that have already been made are usually imported. This excludes the "*name*" of the shape and its "*ID*", an internally used number for unique identification of a shape.



Fig. 25: Storing two shapes on the drawing sheet

If you want to connect a multiple selection to another drawing element, as in this example, the control flow to the action, you will have to select the newly created control flow, i.e. deselect the multiple selection and snap in the control flow in the connection point of the existing action (Fig. 26). The appearance of a multiple selection depends on the respective Visio version used.



Fig. 26: Connecting a control flow to an action

2.4 End node

Now store a closing control flow emanating from the action on the drawing sheet, and connect it with a new *end node* (Fig. 27).



Fig. 27: Storing and connecting control flow and end nodes

Each workflow must have at least one end node from which no other connection may emanate. The workflow may contain multiple end nodes.

When creating a workflow, generally make sure that all routes of the workflow end in well-defined states, i.e. control flows end at end nodes or elements from which in turn emanate connections to other elements. A connection ending at a solitary element is a dead-end for the workflow.

2.5 Moving shape texts

For better transparency, the shape text can be moved to a different position. After selecting the format icon "*Rotate text block*" on the default toolbar, a moving marker will appear when placing the mouse on the text. The text can then be moved to the desired position, keeping the left mouse button depressed (Fig. 28).







Fig. 29: Next, select "default pointer" (pointer tool).

By clicking the default pointer (arrow icon), see Fig. 29 top right, you can exit text edit mode.

2.6 Grouping shapes

Be aware that grouping Visio shapes to a (1) new overall shape is not supported by the DOCUMENTS Workflow add-in! This means that when connecting a grouped shape, for example, to a control flow, the group shape will not be recognized as a workflow shape and therefore not exported.

3. Workflow Element Specification

The following input fields exist for each workflow element:

- Label
- Name
- Description

The entered *label* is also displayed in the shape text. In the case of some shapes, this text can also be edited on the drawing sheet. The text for the "*Action*", *Send Signal*", "*Receive Signal*" and "*Subworkflow*" shapes cannot be edited because the text in these shapes is built and written by the program running in the background. However, these shapes also allow moving the text.

The label is also used to allocate the button labels in DOCUMENTS 4. For more information on this, see chapter 3.2.

As of version 1.2, the *label* can now be entered *in multiple languages*. Thus, DOCUMENTS 4 allows defining the button labels or entries in the function list for each active language.

Multilingual labels

This is performed according to the "online language abbreviation" rule, followed by "value" and "semicolon", e.g. "de:Aktion-1; en:Action-1;".

The DOCUMENTS Manager lets you enable the "*Support multiple languages*" option on the "*Locale/Format*" tab (Fig. 30).

Ocument:	s - Settings		? ×		
Global Setting	gs Documents (basic)	Archive (basic) List export Documents (displa	ay) Locale/format Logbook Lic		
-Format set	Format settings Date format VYYY/MM/DD Decimal point				
	📝 Support mu	ultiple languages			
-Locale 1-	Locale de	Date format DD.MM.YYYY -	Decimal point		
- Locale 2-	Locale en	Date format MM/DD/YYYY -	Decimal point 🚬 🗸		

Fig. 30: "Documents -> Settings -> ->Locale/format"

In order for this setting to become effective, you need to define and enable the languages in the DOCUMENTS Manager as "*online languages*" of the principal (see Fig. 31).

Portal Language(s	:]		
Language 1	Deutsch	Locale de	🔽 Online
Language 2	Englisch	Locale en	🔽 Online

Fig. 31: Principal -> Settings -> Portal languages

The *name* of a workflow element should be unique in the workflow, i.e. allocated once only. Moreover, it should not contain a dot and be Java-compliant because it is used to access additionally implemented extensions (*UserExits*) in Javacode. If the name of a workflow changes, the internally used *ID* of the shapes within this workflow will also change.

As of the DOCUMENTS 4 version and Workflow version 2.0, the name of a workflow element may be up to 255 characters long. The limit in previous versions was 25 characters. While saving a shape adherence to this restriction is checked and, if necessary, the corresponding warning is displayed. This check is performed for all shapes.

The *description* is used to enter a text in which you can save any information.

3.1 Action

Actions are defined in the following dialog, shown in Fig. 32.

Action	X
Label Action	-
Name A. C. 10	-
Action_13	
General Escalation Field Values Fields Tabbed Pages Connections Description	1
Processing	
Type 🙃 Static 🔿 Dynamic Processing by alias/role 💌	
Recipient	
AuthorizedSignatory Overseer PersonnelManager Registry ServiceManager	
Exclusive write lock workflow	
Task	
Comment	
, Open in edit mode	
Show Action list	
Show Copy list	
No mail notification	
🔲 No inbox filing	
Expenditure 1	
Ok Cancel	_

Fig. 32: Action details dialog

Processing

Processing an action can be assigned to various users (Fig. 33). Here the entered *recipient* of the action is the "*PersonnelManager (Secretary)*" alias (see Fig. 34). The edit could also be performed via a named *user*, an *alias* or a *group* of employees.

If the DOCUMENTS file is allocated only for "*information*", then the user will receive the file only for viewing; the workflow will continue after deploying the file. The different processing options are available in the drop-down list.

Processing by alias/role	•
Processing by alias/role	
Processing by a user Processing by a group member Processing by all group members Informing an alias/role Informing a user Informing all group members	

Fig. 33: Processing type of an action

If the recipient's allocation is *static*, then the recipient will be - whether employee, group, etc. - already present in the system and has been fetched by the server via the workflow operation "*Import lists*" and entered in the drop-down list as a possible recipient. The recipient of the action will then be selected from that list. If the edit were performed via a user, then the recipient list would, in case of static assignment, be populated analogous with all users the system is aware of ("Schreiber, Willi", "Stern, Andrea", etc.) and be presented for selection.

Processing		
Туре (Static C Dynamic Processing by alias/role]
Recipient	PersonnelManager	
	AuthorizedSignatory	
	Overseer	
	PersonnelManager	
	Registry	
	ServiceManager	
	Exclusive write lock workflow]

Fig. 34: Processing is statically assigned to the "PersonnelManager" alias

In the case of *dynamic* type of processing, the recipient (the user, group, etc.) is determined first via evaluating a field value, and then assigned to the action. The recipient list displays all fields of the file type. As shown in Fig. 35, the editor of this action is a user because "*Processing by a user*" has been selected.

The field from which the user is read corresponds to the current field value of the *"Contact person"* field. The value for the contact person of the previous file editor must be entered. The DOCUMENTS file is then forwarded to the determined user. If you chose *"Processing by a group"* as the processing type, the field value of *"HRCustomer"* would be interpreted as the name of a group. The same applies to processing by an alias/role. Field names may not contain a comma or semicolon.



Fig. 35: Processing is performed by a user, dynamically assigned from the "HRCustomer" field

If processing is performed by a group member, execution may be performed optionally *asynchronous* or *synchronous* (Fig. 36). If processing is to be performed by a group member, the DOCUMENTS file must be stored in each member's Inbox. Only when this has been performed for all group members will a positive or negative response to the initiating user be sent, if necessary. For groups with a large number of members this process may cause significant delay. Whereas for *asynchronous* execution, the user can continue with his work immediately without having to wait for a completely expired assignment. Execution is always asynchronous with "*Informing all group members*" (Fig. 37).



Fig. 36: "Asynchronous" and "synchronous" execution

- Processing-				
Туре	Static	C Dynamic	Informing all group members	
	🔽 Asynchr	onous execution	🗖 Dissolve group	

Fig. 37: Asynchronous informing of a group

When sending the DOCUMENTS file for information to *all* members of a group, you can also define that file assignment should be performed *asynchronous*, i.e. in

the background of the application, which facilitates immediate continuation of work, or that the file should be sent *synchronous*, i.e. it is sent to all group members ad hoc and complete for the entire group before continuing with the DOCUMENTS file is possible.

Dissolve group

When the "*Dissolve group*" action is disabled, only the editing group and, if necessary, the name of the group member, will appear in the monitor list (Fig. 38).

User	Status	Received:
Documents, Import	Sent	08/11/2011 08:17
Service [Schreiber, Willi]	Forwarded	08/11/2011 08:17

Fig. 38: Display group name and group member with disabled dissolution

Each individual member within the group also appears in the monitor list when this option is enabled (Fig. 39).

User	Status	Received:
Documents, Import	Sent	08/11/2011 08:51
Schreiber, Willi	Forwarded	08/11/2011 08:51
Schmidt, Miriam	Informed	08/11/2011 08:51
Frisch, Eva	Informed	08/11/2011 08:51

Fig. 39: Display all group members with Dissolve group enabled

The selected recipient of an action is displayed in the shape text, enclosed in parentheses, after clicking "OK" to confirm the details dialog "(PersonnelManager)" (Fig. 40).



Fig. 40: Shape text with actions

Task – Comment



Fig. 41: Task - Web

The text entered in the "Task" field is displayed by DOCUMENTS 4 on displaying files in the monitor list and in the DOCUMENTS file's task line (Fig. 41). As of version 1.2, the task text can be entered in multiple languages, e.g. "de:Konto prüfen;en:Check account;". For more information, please refer to the following section: "Multilingual labels".

The comment, which can also be entered in multiple languages, will be entered after forwarding the DOCUMENTS file if you have not specified a comment for the forwarding control flow itself. If processing the action has been "*for information*" only, and therefore automatically, the comment and the task will not be displayed (Fig. 42).

User	Status	Received:	Response:	File OK	Task	Comment
Buch, Bernhard	Locked	08/11/2011 08:58			Check reliability if order is above 500 Euro	
Decision	Passed	08/11/2011 08:58	08/11/2011 08:58			Order larger than 500 Euro
Service [Schreiber, Willi]	Forwarded	08/11/2011 08:55	08/11/2011 08:58	Yes	Check for plausibility	Order accepted

Fig. 42: Monitor list – task and comment - Web

Open in edit mode

When this action is enabled, the DOCUMENTS file will be directly switched to edit mode, i.e. it can be edited immediately on opening it. When this action is disabled, the file editor must first press the "*Edit*" button to be able to make field entries.

Action list - Show copy list



Fig. 43: Action list – copy list - Web

When these options are enabled, the drop-down lists for "*actions*" or "*copy*" will be displayed with a saved DOCUMENTS file (Fig. 43).

No mail notification

As of workflow version 1.3.4, the *Display* group now allows additionally enabling the *No mail notification* option, where delivery of an e-mail message via the file Inbox can be prevented if such has been set up for the user (user settings "*Personal Folders*").

Display Task	
Comment	
	Dpen in edit mode
	Show Action list
	🗖 Show Copy list
	No mail notification
	🔲 No inbox filing

Fig. 44: Turning mail notification on/off

Expenditure

The "*Expenditure*" field lets you add a numerical value to the action which reflects the costs or expenditure of performing the action. The default value of this field is "1".

This version does not yet support server-side evaluation of the expenditure value.

Escalation

Should editing the action not be performed within a certain period, the workflow may respond to this with gradual "*escalation*". This avoids leaving important documents unprocessed during the process, or that the workflow stalls unnoticed (Fig. 45).

Туре	Delegate to user	-
To	E-Mail Message Delegate to user Delegate to alias	
From	Delegate to group Back to initiator	

Fig. 45: Escalation type

The *escalation type* determines the manner in which the escalation is to be performed. If the action is "*delegated*", the action will be withdrawn from the originally assigned editor and the processing transferred to another editor, alias or group.

The DOCUMENTS file can be returned to the original file creator using "*Back to initiator*". When sending the "*e-mail message*" the original editor will continue to be responsible; however, an e-mail message for information about the delay in editing will be sent to a selected editor. The *mail subject* and the *mail text* also allow using *Auto texts* (Fig. 46).

- Leve	l 1 active —			
Tim	e 1	Hour(s)	💌 🗖 Use work calendar	
Туре	e Delegate t	o user		•
To	o 💿 Static	🔿 Dynamic	Oppen, Bernhard	-
Fron	n 💿 Static	C Dynamic		T
Subjec	t			
Mail message	2			

Fig. 46: Escalation – File editing is assigned to "Oppen, Bernhard"

Here the action is forwarded to employee Bernhard Oppen unless it has been edited within an hour. You can select Minutes, Hours, Days, Weeks and Absolute as the time unit. Next, you can define that the specified time span refers to the *annual calendar* or to the *working calendar* (Fig. 47). Because the pending escalation jobs on the server can be checked at five-minute intervals, e-mail messages with an escalation time of under five minutes can only be sent delayed.

(The second secon	-		9 7	
	😻 - Calendar					
	Work hours Holidays					
- 1	Sunday from	00:00	to	00:00:00	*	
	Monday from	08:00:00	to	16:00:00	*	
Correct In	Tuesday from	08:00:00	to	16:00:00	-	
Search	Wednesday from	08:00:00	to	16:00:00	-	
	Thursday from	08:00:00	to	16:00:00	*	
	Friday from	08:00:00	to	16:00:00	*	
	Saturday from	00:00:00	to	00:00:00	-	
	OK Apply	Cancel				
l	OK Apply	Cancel				
⊂ Hit list Z a	allowed functions	Cancel				
- Hit list / a Maxin	allowed functions mum DOCUMENTS hits	Cancel 250		_		
- Hit list / / Maxin	allowed functions	Cancel 250 ✓ PDF creation (Print)		_		
- Hit list / a Maxin	allowed functions mum DOCUMENTS hits	250 ✓ PDF creation (Print) Forward		-		
Hit list / a	allowed functions	250 PDF creation (Print) Forward Export				
Hit list / a Maxin	allowed functions mum DOCUMENTS hits	250 Z50 PDF creation (Print) Forward Export Archive	_			
– Hit list / a Maxiu	allowed functions mum DOCUMENTS hits	250 250 PDF creation (Print) Forward Export Archive Delete				

Fig. 47: Settings for the calendar

If you choose an absolute time, the format of the timestamp must match the settings in the DOCUMENTS Manager under "Main menu -> Documents -> Settings -> Documents settings -> Format settings -> Date format". If DD.MM.YYYY has been selected there, then the required format for the timestamp reads: DD.MM.YYYY ss:mm (with two spaces between date and time).

🕫 Documents - Settings 🔹 🔹 👻									
Global Settings Documents (basic) Archive (basic) List export Documents (display) Locale/format Logbook Lic									
- Format set Date	Format settings Date format YYYY/MM/DD Decimal point								
Support multiple languages									
-Locale 1-	Locale	de	Date format	DD.MM.YY	^^^	•	Decima	point 🔎	•
Locale 2-	Locale	en	Date format	MM/DD/Y	***	•	Decima	point .	•

Fig. 48: DOCUMENTS settings -> ->Locale/format

Depending on whether a *static* or a *dynamic* recipient determination is made, the recipients available for selection in the drop-down list are displayed. When *delegating* the DOCUMENTS file to a user, group or alias, the user, group or alias list will be displayed with *static* determination. During *dynamic* determination the fields that the file type contains from which the user, group or alias is then to be read as a field value. When selecting the "*Back to initiator*" form as escalation type, the DOCUMENTS file will be forwarded to the file creator.

Field values

Fields of a file type can be set to defined values by an editor at the beginning and end of the action, i.e. prior to opening and after closing (Fig. 49). Thus, the value of the "*Priority*" field is set to "normal" here. You can create the values via the "*New*" button from the field values list or via the "*New*" button from the edit dialog.

To edit the values, double-clicking an entry is enough. While editing, all known fields are displayed with their technical name in the list on the left. To generate an empty value ("), you leave the value field on the right empty accordingly.

Field names may not contain commas or semicolons.							
General Escalation	ield Values Fields Tabbed Pages C	Connections Description					
Incoming event	Edit						
Name	Name	Value					
hrLastName	hrLastName	Schreiber					
	hrFirstName hrInternalComment hrLastName hrLogin hrReason hrRemainingDays0fVacation hrStartDate hrStatus hrSubstitute hrType						
New Delete	Ok New Cance	əl					

Fig. 49: Field values for the "Priority" field

The fields for which the values have been allocated are displayed in the field values list (Fig. 50):

General Escalation Fiel	d Values Fields	Tabbed Pages Connections Description						
Incoming event								
Name		Value						
hrLastName		Schreiber						
1								

Fig. 50: Field values list for Inbox
Auto texts as field values

Auto texts can also be used as field values; the current date is used for the auto text %currentDate%.

Field references as field values

They can also refer to the value of other fields when allocating values. Thus, for instance, Priority is replaced with the current value of the "Priority" field. This option is also available when allocating an e-mail subject, e-mail text and the comment fields.

PortalScripts as field values

When you enter "runscript" as the field name and the name of the script to be run as the field value, the specified Java script will be executed on the server side (Fig. 51).

General Escalation	Field Values Fields	Tabbed Pages Connections Descript	ion
Incoming event			
Name		Value	
runscript		setValue	

Fig. 51: Setting a field receipt value through Java script

Fields

As of version 1.2, this tab lets you regulate access to fields for the user. If you do not make any entries, all fields with read and write access for the user in the Web front-end will be displayed with their technical name. When allocating the permission for a field, only that field will be displayed with the corresponding permission, i.e. you need to select other fields, even if these are to be displayed, and assign them with the corresponding authorization. Fields from the list of "Available fields" will then not be displayed.

When pressing the ">" button, you can transmit a selected entry from the list of "Available fields" to the list of "*Selected fields*". Double-clicking an entry also allows you to initiate moving. In doing so, the permission is set depending on the selected access option. All list entries are transmitted by clicking the ">>" button (Fig. 52). For selected fields in the list of "*Selected fields*" you can then define the access type via the option buttons "*Mandatory field*" (RWM), "*Read/Write*" (RW) and "*Read-only*" (R). Multiple selection of entries is allowed here. Checking the required fields, where you need to enter a value, will be performed within the DOCUMENTS file on switching tabs if the file is in edit mode. The "*Hide all fields*"

option lets you generally suppress display of all fields on the Web. Field names may not contain a comma, semicolon or the reserved label "runscript".

Action Label de:Vertretung;en:Substitute; Name Action_3					
General Escalation Field Values F Hide all fields All fields %ref.hrEmployeeNo.hrSuperior% hrApproval hrApprovaDate hrApprovedBy hrCalendarObjectId hrComment hrDuration hrEndDate hrInternalComment hrReason hrRemainingDaysOfVacation hrStartDate hrSubstitute hrType		Access Mandatory Read/Write Read/Write Readonly Selected fields Field Name hrEmployeeNo hrFirstName hrLastName hrLogin hrStatus	Access (RWM) (RWM) (RWM) (R) (R) (R) (R) (R) (R) (R) (R) (R) (R		

Fig. 52: Selecting the fields and specifying the access rights for "Selected fields"

contact pers	son	
Meldung	von Webseite	×
4	The following errors occurred while saving the fields: No value specified for mandatory field. (contact person))
	ОК	

Fig. 53: Error message for mandatory fields, e.g. "Contact persons" field



Fig. 54: Tab view in DOCUMENTS 4

The tabs displayed in DOCUMENTS 4 can be set on the following tabbed page.

Here, too, the following applies: If no tab is selected, all available tabs of the file type will be displayed in DOCUMENTS 4. The technical name of the tab will be displayed here. Once you select a tab, only that tab is displayed. If you want to display other tabs as well, you need to select them. The tabs will be determined when you execute the "*Import lists*" operation on the workflow shape. You will find the tabs included with the file type in the editorial client. The "*Fields*" and "*Status*" tabs are default tabs which cannot be removed.

Access can also be defined as read access or write/read access for the tabs (Fig. 55). Tab selection and permission assignment are made as with the fields. The "*Hide all tabs*" option lets you generally suppress displaying all tabs – with the exception of the default tabs - on the Web.



Fig. 55: Selecting the tabs and defining tab access

Connections

General Escalation Field Values Fields	Tabbed Pages Connections Description			
Uutgoing Connections				
Name	Label			
ControlFlow_23	Out1			
ControlFlow_22	Out3			
ControlFlow_24	Out2			
Up Down				
Incoming Connections				
Name	Label			
ControlFlow_21	In1			
ControlFlow_20	In2			

Fig. 56: Incoming and outgoing connections with arrangement option

On the "*Connections*" tab (Fig. 56) you can see a separate list of incoming and outgoing control flows on the shape. You can directly open the corresponding control flow by double-clicking a list entry. In doing so, the action dialog is saved and closed. In reverse, the relationship fields "From" shape and "To" shape that the control flow dialog contains allow opening the details dialog of the corresponding connection shapes. These navigation options enable you to navigate through the workflow even without clicking the shapes. The connection page is not displayed for the start, end and subworkflow dialog.

The outgoing connections can be moved via the "Up" or "Down" button. This defines the order (From top to bottom) in which the buttons that are equivalent to the control flows are displayed in DOCUMENTS 4.



Bearbeiten Out 1 Out	t 2 Out 3					
Ausgehende Verbindungen						
Name	Name Bezeichnung					
ControlFlow_5	Out 1					
ControlFlow_6	Out 2					
ControlFlow_7	Out 3					
	-					

Fig. 57: Connection order and arrangement of buttons in Web front-end

Control Flow
Label Out3
Name ControlFlow_22
General Access Field Values Description
Guard Script
Condition
Error message
Display
Control Button
Navigation Keep file in view
Comment
I File 0k
🔲 Leave in Inbox
Withdraw from other Inboxes
🔲 Copy to 'Sent Items' folder
Forward directly
Nodes
From Action_19
То
Ok Cancel

3.2 Control flow – Operation - Escalation transition

Fig. 58: Control flow details dialog

The *control flow* (Fig. 58) describes transition from one workflow element to another. This transition can be "guarded", i.e. made to depend on a condition occurring. In an *operation* a transition to the same element occurs.

In doing so, however, new incoming files are not triggered. The operation is therefore used to assign fields new values via field values. If a transition is to be performed as part of an *escalation*, you can set a time after expiration of which the transition is automatically performed. An escalation transition may only emanate from an action, subworkflow, send signal or receive signal shape. For escalation transition and control flow, the rule applies that the transitions of different shapes must be connected to each other.

Multiplicity

A maximum of one *escalation transition* may be appended to a shape. With exceptions (start and end nodes), multiple *control flows* and *operations* can be docked.

Guard

The transition from one item to the next - forwarding - can be "guarded", i.e. the transition will only be performed by the system when a specific condition is met. This expression can be specified in the "*Condition*" field.

If, for instance, two action shapes A1 and A2 are connected to a guarded control flow, the DOCUMENTS file will be sent back to the editor of A1 if the transition condition is not met. Only when the condition is met will the DOCUMENTS file be forwarded to the responsible editor of A2. Evaluation results of the condition are also included in the monitor list.

The guard is evaluated after *actions* where the DOCUMENTS file is actually edited, i.e. file editing is not limited to a simple "information" task. An evaluation is also performed when the control flow is part of a *decision* shape.

Error message

If the condition is not met, you can specify the *error message* to be displayed here. An error message can only be entered for control flows that come from actions.

Script

The conditional check can also be performed via a server-side Java script (Fig. 59). By enabling this option, a Java script will be released from the list of known scripts. This list will be imported when you perform the "*Import lists*" operation on the workflow shape.

The condition is satisfied when the script has a return value of "1 (return1;)". The *error message* entered, where present, is output with a return value of "0".

Guard	Script setValue	•
Condition	runscript:setValue	_
Error message	field contact person is mandatory	_

Fig. 59: Script-based conditional check

Access and visibility

General Access Field Values Description
Condition
Confirmation
Message
Check password

Fig. 60: Controlling access and visibility with control flows and operations

As of Workflow version 1.3.4, the *Access* tab (Fig. 60) allows you to influence whether a transition, as a button or as an entry in the functional drop-down list, should/may be displayed or not.

For this, you can explicitly allocate a condition that controls visibility. However, *visibility* can also be determined from the iteration of a script that checks for permissions or other restrictions, for example.

If visibility is available and the condition is met, a *message* may be displayed which you need to confirm so that the process is finally executed, e.g. "When you execute this process, then DOCUMENTS files will be permanently deleted. Perform the delete operation? (OK/Cancel)". When the *Password Check* function is enabled, you additionally need to enter the password of the logged-in user to ensure the process is completed, and forwarded.

Escalation time

😑 Escalation transition	×
Label Name ControlFlow_25	-
General Field Values Description Escalation time Use work calendar Time	
Unit Day(s)	
Display	
Nodes	51
From	
To	
Ok Cancel	

Fig. 61: Timings for an escalation transition

You can specify a time in an *escalation transition* (Fig. 61) after whose expiration the transition is automatically performed.

Next, you can determine that this time should refer to the *annual calendar* or the *working calendar*. Length of time and time unit will be displayed as shape text unless you have specified a name for the shape. See also section *Use working* calendar. As of version 2.0, you can also specify an absolute and therefore fixed time.

Button labels in the Web front-end

In DOCUMENTS 4, the of the *technical name* of the control flow is used as primary button label. It should always be allocated within the meaning of clear user experience.

If a technical name is missing, the system will take the technical name of the following workflow element ("*Action 2*"). If that element does not have its own technical name either, the system will perform labeling depending on the following workflow element. This corresponds to the technical name of the element (see Fig. 62 "*Action_10*").

Whereas if a control flow has a label, that button label will be used ("OK", "To Action 1"), depending on whether the workflow element that follows has been assigned a label or not.



Fig. 62: Control flow name and button labels in workflow step "Action_10"

Button arrangement, i.e. the order in which they are loaded via DOCUMENTS 4 can also be influenced: See Connections in chapter 0.

Multilingual labels

The *label* can also be created in multiple languages in DOCUMENTS 4. This is performed according to the "*online language abbreviation*" rule, followed by "*value*" and "*semicolon*", e.g. "de:Aktion-1;en:Action-1". The DOCUMENTS Manager lets you enable the "*Support multiple languages*" option on the "*Locale/Format*" tab (Fig. 63).

🧐 Document	s - Settings		? ×
Global Setting	gs Documents (basic)	Archive (basic) List export Documents (displa	ay) Locale/format Logbook Lic
Format set	tings format	DD 🔻 Decimal point	•
	🔽 Support m	ultiple languages	
Locale 1 -	Locale de	Date format DD.MM.YYYY -	Decimal point 💭 🗸
Locale 2-	Locale en	Date format MM/DD/YYYY -	Decimal point 🚬 👻

Fig. 63: DOCUMENTS settings -> Locale/format

In order for this setting to become effective, you need to define and enable the languages in the DOCUMENTS Manager as "*online languages*" of the principal (Fig. 64).

Portal Language(s)					
Language 1	Deutsch	Locale	de	🔽 Online	
Language 2	Englisch	Locale	en	🔽 Online	

Fig. 64: Principal -> Settings -> Portal languages

Form of representation in DOCUMENTS 4

Besides the function buttons, the labels of the control flows can also appear as entries in a functional drop-down list in the Web front-end. The selected function is triggered by clicking the adjoining icon. In the following workflow from Fig. 65 the outgoing control flows from 1-5 were arranged on "Action1", where the representation was selected as a "drop-down list" as the interactive element for control flows "2" and "4". Control flows "1", "3" and "5" retained their default settings ("Function button").



The function list always appears last, after the function buttons.

Fig. 65: Rendering options: Function button and drop-down list

Navigation

Navigation allows you to specify which view should be displayed after editing the DOCUMENTS file, i.e. after it has been forwarded. Thus, for instance, the editor can be returned to their "*Inbox folder*", "*For overview*", to the "*next DOCUMENTS file to be edited*" or back to the same DOCUMENTS file ("*Keep file*"). In an escalation transition, the existing DOCUMENTS file is always kept with the transition.

Comment – File OK

User	Status	Received:	Response:	File OK	Task	Comment
Buch, Bernhard	Locked	08/11/2011 11:13			Check reliability if order is above 500 Euro	
Decision	Passed	08/11/2011 11:13	08/11/2011 11:13			Order larger than 500 Euro
Service [Schreiber, Willi]	Forwarded	08/11/2011 11:12	08/11/2011 11:13	Yes	Check for plausibility	Order accepted
Schreiber, Willi	Sent	08/11/2011 11:12	08/11/2011 11:12			

Fig. 66: Monitor list

The "*File OK*" and "*Comment*" fields let you specify a brief state description of the DOCUMENTS file which is entered in a *monitor list* in an overview presenting the route and history of DOCUMENTS file through the workflow (Fig. 66). While with "*File OK*" you can generally switch the file state to "*OK*" or "*Not OK*", you can also enter auto texts in the comment, e.g.:

"Audits are performed by %userFullname% on the %currentDate%".

If a value is allocated to the "*comment*", this cannot be overwritten even if the "*Forward immediately*" option is disabled. Also, in case of manual forwarding, the value for "*File OK*" will not be evaluated because this must be entered on the routed page itself. In an escalation transition, the file state is always set to "*OK*".

Leave in Inbox

You can set here that a DOCUMENTS file is retained in the user's *Inbox* even after it has been edited.

Copy to "Sent" folder

Here you can define whether a file copy should be stored in the user's "*Sent Items*" folder.

Forward immediately

When this option is enabled, the DOCUMENTS file will be immediately forwarded to the next user without displaying the routed page. In doing so, the "*File OK*" and "*Comment*" fields are set as specified above.

When this option is inactive, a routed page will appear (Fig. 67) which allows the option - when clicking the value "*No*" for "*File OK*" - for a "*enquiry*", "*Forward to*" or for "*Forward to default recipient*" (Workflow). In an escalation transition the transition is always performed as an immediate forwarding.

Forward file				
File OK?	• Yes • •	No		
Comment	Order not correct	t		
	Forward to d [emailAddres	efault recipient s]		
	Forward to	- Sender (Schreiber, Willi)		
	C Confer with	- Initiator (Schreiber, Willi) User - Buch, Bernhard - Documents, Import - Frisch, Eva - Klein, Peter - Local, James - Oppen, Bernhard - Perona, Bianca - Schlepp, Stefan - Schmidt, Miriam - Schweiber, Willi - Schwer, Stefan - Stern, Andrea	Y	
Task Forwa	rd >> Cano	cel		

Fig. 67: Routed page

If an "enquiry" is performed, the DOCUMENTS file will be initially sent to another employee in order to be sent back to the sender via a new routed page after it has been edited (Fig. 68). When "*forwarding*" the DOCUMENTS file, the DOCUMENTS file that has already been edited will be sent to the next workflow element via another employee. While forwarding to the "*default recipient*" you switch to the next element, as specified in the workflow (Action -> Action). Enquiries and forwarders are logged in the monitor list. The formation of an enquiry string where employees of the prompt start a new enquiry themselves is not supported.



Fig. 68: "File OK" – enquiry and forwarders

The disabled option "*Forward immediately*" will only be evaluated after actions where the DOCUMENTS file is actually edited by a group, alias or user. If the preceding workflow item is edited by the system (e.g. signal, decision, etc.), forwarding will be automatic, i.e. immediate.

Withdraw from other Inboxes

When this option is enabled, the DOCUMENTS file will be removed from other users' Inboxes. This is useful, for instance, when it is enough that only a group member must or should edit a DOCUMENTS file.

In doing so, the DOCUMENTS file is initially stored in the Inbox of all group members. Once the DOCUMENTS file is edited by an employee, it will be automatically removed from the Inbox of the other group members.

As of Workflow version 1.3.4, this option can also be turned on with modeled escalation, the *escalation transition*. As the workflow continues at the escalation time, the DOCUMENTS file is removed from the Inboxes of the other users to prevent direct editing after escalation.

Field values

The "*Field values*" tab lets you assign, as with the *action* (see above), specific field values to fields in transition to the next workflow element.

Connected nodes

Nodes	
From Action_9 - Action	
To Action_2 - Action	

Fig. 69: Relationship to the nodes that the control flow connects

This group displays which nodes are connected with each other on the drawing sheet (Fig. 69). The target node "From/to" is always the shape at the arrowhead.

If the relationship exists, i.e. the control flow is connected to a shape, you can immediately open the details dialog of the corresponding shape by pressing the button on the right. This closes the control flow dialog, and the changes made are saved and the details dialog of the relationship shape opens.

Analogous, the details dialogs of the relationship shapes contain a tab named "*Connections*" that lists the incoming and outgoing control flows on the shape.

3.3 Send Signal

🖻 Send Signal	×
Label Send Signal	
Name SendSignal_14	
Type XML Export	
Comment	
Exclusive write lock workflow	
XML Export Escalation Field Values Fields Tabbed Pages Connections Description	1
Outbox	
Job	
Export without documents	
Export status	
Export monitor	
Ok Cancel	

Fig. 70: Send Signal details dialog

3.3.1 Type

The workflow element "*Send signal*" (Fig. 70) lets you send a "*signal*" to which other applications may respond (external sending) or give the workflow system the signal for internal conversion. The corresponding setting is made in the "Type" field (Fig. 71):

Туре	XML Export
Comment	XML Export
Exclusive write lock	Archive Insert in folder
National Ends	Change filetype Javascript

Fig. 71: Send signal type

XML export

XML Export Escalation Field Values Fields Tabbed Pages Connections Description	
Outbox	
Job	
Export without documents	
Export status	
Export monitor	

Fig. 72: XML export including export of status and monitor information

This *signal type* initiates an *XML export*, i.e. creating an XML file with the fixed field names and field values in the specified Outbox, i.e. an existing directory on the server. In doing so, the documents assigned to the DOCUMENTS file will also be stored in a subdirectory in the Outbox when the *Export without documents* option has not been enabled.

In this case, a reference to this directory is additionally written from the XML file.

Additionally, *status and monitor information* can also be exported, where an HTML file that contains this information is respectively created. A reference is then written to these HTML pages within the XML file (Fig. 73).

If XML export is to be performed without documents, these information pages will not be generated.

Monitor

User	Status	Received:		Response:		File OK
Schreiber, Willi	Sent	08/11/2011	13:55	08/11/2011	13:55	
Schreiber, Willi	Forwarded	08/11/2011	13:55	08/11/2011	13:55	Yes
[XML: c:\tmp]	Performed	08/11/2011	13:55	08/11/2011	13:55	
Workflow end	Finished	08/11/2011	13:55	08/11/2011	13:55	
Status		Comment	Time		User	
Finished sending			08/11	/2011 13:55	Schre	eiber, Willi
DOCUMENTS file		08/11	/2011 13:55	Schre	eiber, Willi	
Started sending		08/11	/2011 13:55	Schre	eiber, Willi	
File edited		08/11	/2011 13:55	Schre	eiber, Willi	
Distribution list c		08/11	/2011 13:55	Schre	eiber, Willi	
DOCUMENTS file		08/11	/2011 13:55	Schre	eiber, Willi	

Fig. 73: Exported monitor list and exported status information

The *Job* field lets you specify the name of a batch file that will be started after export from the server. The path to the created XML file is passed to this data file as a parameter (Fig. 74). This allows you to initiate ongoing processing of data via a third-party program.



Fig. 74: Example of an XML file from export

E-mail

Mail Escalat	ion Field Va	lues Fields Tab	obed Pages Connections Description
Recipient	Static	O Dynamic	▼
Sender	 Static 	C Dynamic	
Subject			·
Mail			
message			

Fig. 75: Signal type –E-mail

This signal type (Fig. 75) is used to send an e-mail message.

The recipient or sender can be *statically* determined, and will then be a user of the system, e.g. "Schreiber, Willi", or a fixed preset e-mail address, e.g. <u>service@peachit.de</u>. During *dynamic* determination, the address is determined from the value of the field that has been selected from the drop-down list. Auto texts can also be used in the "*Subject*" and "Mail body" fields. When the *Don't attach documents* option is enabled, the file documents will not be added to the e-mail message.

Archiving

If during archiving "*static*" mapping is enabled, you can initiate export to the selected archive from the list of existing and released archives.

The archive names available for selection are fetched from the server when pressing the "*Import lists*" button in the workflow shape. When selecting the "<Archive>" archive, the DOCUMENTS file will be deposited in the file type's target archive. When the *Export without documents* option is enabled, file documents will not be transferred to the archive.

If status and monitor information is to be also archived, this must be specified directly on the file type via the DOCUMENTS Manager (Fig. 76).

File type: ftRecord (peachit_fi20070000003506)				
General Advanced settings Workflow Archiving Actions Scripting Properties				
Archiving				
Destination serve	Main server	-]	
	🔽 Archive status	🔽 Archive monitor	🔽 Archive do	cument meta-data
Actions			-	
	🔽 Create archive files	📝 Quick creation	of archive files	🔲 Reactivate



Group

This signal initiates internal grouping of the DOCUMENTS file into the public folder selected from the list. The available folders are determined on the workflow shape while executing the "*Import lists*" function. This function is primarily used to represent incoming DOCUMENTS files more transparently for the user and to presort them.

Change file type

This signal type is used to instruct the workflow to use the file type selected from the list rather than the previously used file type. The switch impacts on the entire DOCUMENTS file. The file structure is customized to the new file type here. The workflow can then respond to fields not present in the previous file type. The list of available file types will be determined when you execute the "*Import lists*" function on the workflow shape. This will then be available with "*static*" mapping.

If the DOCUMENTS file to be switched to should be determined from the value of a file field, i.e. "*dynamically*" assigned, you will have to select the corresponding field from which to read the value (Fig. 77). The list of field names will be determined when you execute the "*Import lists*" function on the workflow shape.

If a field name corresponds to a file type, the switch will be made directly to the file type; in this case, the field name will not be interpreted as "*dynamic*".

Change filetype	Escalation Field Values Fields Tabbed Pages Connections Description
Туре	💿 Static 🔿 Dynamic
Filetype	
	ftEmployee ftInvoice ftOrder ftRecord ftSickCertificate ftVacationApplication

Fig. 77: Change filetype dynamically

Fields from the original file type which are not present in the new file type will be lost, including their field values, during the further edit operation of the file.

So, an intersection of the jointly used fields should be available when changing file type and, moreover, the replaced file type should be used to determine basic data.

Changing file types (see Fig. 78) will be necessary when subworkflows created on a different file type should be initiated and when field values should be modified by the system or by user input in this subworkflow. Switching will not be necessary when working with different workflows of a file type.



Fig. 78: Change file type, and subworkflow

Java script

Here (Fig. 79) you can specify the name of a server-side Java script from the list which is executed via the send signal. This list will be populated with the familiar server-side scripts when you execute the "*Import lists*" function on the workflow shape.

Script name	
	cmsWebContent Belease
	hrAppointmentClass
	hrSickCertificate_onSave
	hrVacationApplication_createAppointment_SignalExit
	hrVacationApplication_onSave
	InvoiceReport
	libworamu libworamu Easter
	libWordML Header
	libWordML Image
	libWordML.Paragraph
	libWordML.Table
	libXML
	msglbl

Fig. 79: Executing server-side Java scripts

Comment

Here you can define a text with or without using auto texts for the monitor overview of the DOCUMENTS file which is automatically entered as an edit note after sending the signal.

3.4 Receive Signal

In reverse, you can use the *Receive Signal* (Fig. 80) to wait for a *condition* to occur.

🗃 Receive Signal	×
Label	
Name ReceiveSignal_9	
Common Escalation Field Values Connections Description	1
Exclusive write lock workflow	
Comment	
Ok Cancel	

Fig. 80: Receive Signal details dialog

File editing will be locked against all users until that condition is met, i.e. the workflow pauses at this point. As a rule, the send signal is used when the value of a file field is modified by a third-party program. The occurrence of the condition can also be checked via a server-side Java script; to do this, you need to enable the "*Script*" option and select the validation script from the list. This selection list

will be populated when you execute the "*Import lists*" function on the workflow shape. The condition will be met if the script has a return value of "1 (return 1;)".

You can also enter a message for the monitor list using auto texts in the *Comment field*. Using the escalation mechanism, you can respond to the non-occurrence of the condition. The occurrence of the incoming signal condition is included in the monitor list. Validation is performed by the server at 5-minute intervals.

3.5 Subworkflow

💼 Subwork	flow
Label	Sub-Workflow
Name	Subworkflow_1
Assignment	💿 Static 🔿 Dynamic
Subworkflow	
Description	
Ok	Cancel

Fig. 81: Subworkflow details dialog

Using the subworkflow you will be capable of starting other workflows like a kind of subprogram. While "*statically*" assigning the subworkflow (default value), the workflow selected from the drop-down list is started as a subworkflow.

The drop-down list will be populated with the names of the workflows existing on the server when you start the "*Import lists*" function on the workflow shape.

If the assignment on which subworkflow to execute is to be performed "*dynamically*", the drop-down list will be filled with the names of the file fields. The subworkflow entered as a value in the selected field will then be executed. The listed names are formed from the workflow name, a hyphen, and the version number. You can also, if known, directly enter the name of the subworkflow (incl. version number).



Fig. 82: Change file type on using subworkflows

If the subworkflow uses a file type other than the current workflow, you should change file types prior to starting the subworkflow if field value are to be changed in the subworkflow by the system or by user input.

In Fig. 82 an incoming fax document is checked on whether it is a purchase order or an invoice. In the case of an invoice, a change is made to the "*Invoice*" file type, followed by starting the subworkflow "*Purchase invoice-1*". The file type change always impacts on the entire DOCUMENTS file (global). If the file type of the subworkflow and the current workflow are identical, you will not need to change file type.

If a subworkflow should be designed recursively, it must be exported first to make the server aware of it as a workflow. Following this, the server lists must be reimported. After that, you can select it from the "*subworkflows*" drop-down list, and then export it. "*DOCUMENTS workflow*" is equipped with a "*recursion brake*"; it recognizes workflows which automatically start in an endless loop.

Please be aware that the "*Seal file*" and "*Delete file*" options are not evaluated in the end states of the called workflows because this could impair usability of created workflow modules and might cause blockage of the calling workflow.

The following restriction has been incorporated for the subworkflow shapes:

Only one (1) control flow may emanate from a subworkflow shape.

The corresponding warning is displayed on appending another control flow.



3.6 Delay shape



The *delay shape* (workflow version 1.3.4 or higher) allows performing time-driven transitions (Fig. 83 and Fig. 84). Used in *parallel/or* workflow processes, this may function as a timeout signal for a process string (see chapter 3.8).

🔜 Delay
Label Delay
Name Delay_27
General Field Values Connections
Properties
Use work calendar
Time 1
Unit Minute(s)
Exclusive write lock workflow
Comment
Description
Ok Cancel

Fig. 84: Details dialog of a delay shape

Multiplicity

Only exactly one control flow may emanate from a delay shape. Appending an escalation is not allowed.

Use working calendar

When using a working calendar with the principal (Fig. 85), the time units will be calculated in relation to the calendar, i.e. if there should be a delay of three working hours, which can sometimes be interrupted by a work free weekend, the use of the working calendar must be enabled (*Documents-> Settings->Calendar*).

obal Settir	ngs Documents (basic)	Archive (basic) List expo	t Documents (di	splay) Locale/f	format Logbook L	.ic
DOCUME	ENTS settings	Vew users with autom	atic DOCUMENT!	S access		
ſ	🔮 - Calendar				? ×	í.
	Work hours Holidays					
	Sunday from	00:00	to	00:00:00	÷	
	Monday from	08:00:00	to	16:00:00	÷	
	Tuesday from	08:00:00	to	16:00:00	*	
Search	Wednesday from	08:00:00	to	16:00:00	-	
	Thursday from	08:00:00	to	16:00:00	÷	
	Friday from	08:00:00	to	16:00:00	-	
	Saturday from	00:00:00	to	00:00:00	÷	
	ОК Арріу	Cancel				
Hitlist / a	allowed functions	250			_	
малш		✓ 200 ✓ PDF creation (Print)				
		Forward				
V Export						
V Archive						
		🔽 Delete				
Calendar						
Calendar		V Use calendar		pen calendar		

Fig. 85: Global settings->Calendar

Execute by time

This lets you define after how many time units the forwarder should occur.

The times set will be displayed in the shape text if no separate *label has been allocated* to the shape.

Please be aware that server-side checking of the times is performed in a separate server job which, depending on the configuration, is performed at a specific interval, e.g. at a five-minute interval. As of version 2.0, you can also specify an absolute and therefore fixed time here.

Comment

The *comment* entered here is displayed in status and monitor view on forwarding the DOCUMENTS file.

Connections

The incoming and outgoing connections to other shapes which exist to this delay shape or emanate from it are displayed here.

The following restriction must be adhered to for delay shapes:

A delay shape may have multiple incoming control flows, but only exactly one (1) outgoing control flow.

3.7 Simultaneous sequence and synchronization

The workflow shapes "*Simultaneous sequence*" and "*Synchronization*" (Fig. 86) enable you to split the workflow into different side-strings.



Fig. 86: Modeling simultaneous sequence and synchronization

The workflow is locked on the synchronization point until all substrings have queued up at the endpoint. A processing string may therefore not terminate in between; it must iterate through to the synchronization point (Fig. 87).



Fig. 87: Modeling within a parallel and synchronization section



Fig. 88: Start and end for substrings "String 1" and "String 2"

Each substring may only have exactly one starting point with which parallel processing respectively begins. All workflow items stemming from this substring must merge into exactly one and the same ending point on the synchronization point. If, as in Fig. 88 on the left, multiple ending points (End 1 and End 2) emerge for a substring, these must, as shown in Fig. 88 on the right, be reduced through a decision/merge to a single point (End 1).

Consider the following rules for modeling:

- 1. For each simultaneous sequence there must be exactly one related synchronization point.
- 2. Processing strings must iterate from branch to synchronization point
- 3. Connections between different processing strings are not allowed
- 4. A parallel and synchronization section may not be left
- 5. A processing string has, including its branches, exactly one starting and one ending point.
- 6. Field value changes always apply to the entire DOCUMENTS file. They are not limited to substrings.



Fig. 89: Synchronization and parallelization

Simultaneous modeling of synchronization and parallelization, e.g. synchronization from three to two parallel strings (see Fig. 89 on the left), is not allowed. This must be preceded by reduction to a simple processing string (see Fig. 89 on the right).

If the option for the editor of a DOCUMENTS file to become active in multiple strings is available, e.g. because the editor is a member of different groups, *navigation* in control flow leading to parallel branch, should be switched to "overviews".

In the "*tasks*" section of the overview table or directly in the tasks folder itself, the editor can then recognize in which string and in which workflow step editing tasks accrue. This requires that a "*Task*" has been allocated in the respective action which can then be displayed.

🖶 Fork	×
Label	
Name Fork_37	
□ Or	
Field Values Connections Description	
Incoming event	
Name	Value
New Delete	•
	<u> </u>
🖶 Join	×
Label	
Name Join 40	
IT Or	
Field Values Connections Description	
Incoming event	
Name	Value

Fig. 90: Details dialogs – simultaneous sequence and synchronization

As with the action, the details dialogs to these shapes allow entering *field values*. For more detailed information, see the relevant section *Field values* in chapter 0.

3.8 OR branches and synchronizations

Workflow version 1.3 provides two new shapes for designing parallel processes within a workflow.

In conventional parallel processes, each string must iterate completely by itself so that the workflow does not pause on the synchronization point waiting for all strings to be processed before it continues, as in the figure, with the action for the *Warehouse* group. When modeling using the *OR parallel* and *OR synchronization* shapes, it is enough that one (1) substring has been completely processed by itself, arriving at the OR synchronization point.

The workflow then does not wait for the other string to complete; instead, it immediately continues the process after the *OR synchronization* shape.



Fig. 91: OR parallel and OR synchronization shapes

In Fig. 91 it is therefore enough that the Service department, for example, has executed its action so that the *Warehouse* can begin its action. If the Service department has not processed its action within a day, the *Delay* shape will become active and the workflow will continue with the action for the *warehouse*. The *Service* group can then no longer edit the DOCUMENTS file.

For OR parallel and *OR synchronization* shapes, the same modeling restrictions and regulations apply as for the conventional *simultaneous sequence* and *synchronization* shapes. See also chapter 3.7.

In addition, the following rules apply that must be adhered to for correct processing of the workflow steps:

A parallel process introduced with an OR parallel shape must also terminate with an OR synchronization shape.

A parallel process introduced with a parallel branch shape must also terminate with a synchronization shape.



Toggle the parallelization type

Fig. 92: Toggle between OR and conventional functionality by enabling/disabling the "Or" option

By disabling the *Or* option (Fig. 92), an *OR parallel* shape can be turned into a simple *Fork* shape. Analogous, the *Fork* shape can be turned into an *OR parallel* shape by enabling the relevant option. This option of direct conversion is not available for workflows version 1.2 and earlier. If you want to make a change to the parallelization type using these shapes, you will need to completely replace these shapes and specify them accordingly.

You can also glean the *parallelization type* from the window title of the respective details dialog (Fig. 93).



Fig. 93: Parallelization type and its representation in the dialog title

3.9 Merge - Decision

In many cases, the path of a workflow can be automatically determined through decision and merge shapes (Fig. 95) and the evaluation of branch conditions. The conditions are specified in the adjoining control flows. This also allows using auto texts in the conditions.

💌 Decision	×
Label	
Name DecisionMerge_56	
Field Values Connections Description	1
Incoming event	
Name Value	
New Delete	
Outgoing event	
Name Value	
New Delete	
Ok Cancel	

Fig. 94: Details dialog – Merge – Decision


Fig. 95: Merge decision

Conditions emanating, as shown below, from an action shape and connecting to a decision shape are always interpreted as a condition for the action shape, not as a condition for the decision shape.



Fig. 96: Control flow condition

When creating decision shapes, make sure that one condition always applies. An outgoing control flow should contain an "*else*" branch as a condition expression to ensure that a decision branch can always be iterated through. If a decision cannot be made, the workflow may be idle at the decision point.



Fig. 97: Decision and merge chain in a workflow

Since the respective state of the shape, whether this is a decision or merge shape, is dependent on the number of incoming and outgoing control flows, the shape's interior is dimmed in case of a merge. In the case of a decision, the shape background is set to white. The respective state can also be gleaned from the heading of the details dialog.



Fig. 98: Appearance for decision/merge

Particularly when designing a decision or merge chain in a workflow, you should consider clear and functional assignment of the shape, whether decision or merge, because the workflow in the chain is more often than not automatically evaluated and controlled (Fig. 98). Shapes that might be interpreted as a hybrid state on account of their design (see Fig. 99, on the left) can be split into two single shapes including carefully-defined states, as shown in Fig. 99, on the right.



Fig. 99: Splitting an item into two functionally separate items

Operations or control flows emanating from the shape and ending on the same shape, i.e. referring to themselves, are not allowed on the shape. The decision made and the evaluation of the decision expression are also displayed in the monitor list.

As within the action, the details dialog of the shape allows defining *field values*.

3.10 Start node

Each workflow must have exactly one start node (Fig. 100). Although transmission can be made on the server, the starting point of the workflow will only be retrieved if the start node itself is present.

Start X
Label
Name InitialState_14
T Archive file
Field Values Description
Outgoing event
Name Value
New Delete
Ok Cancel

Fig. 100: Start node details dialog

Moreover, the start node may only have exactly one outgoing connection which unlike the normal control flow - does not allow specifying the "*Guard*", "*Leave in Inbox*", "*Withdraw from other Inboxes*" and "*Forward immediately*" fields, because actually sending the DOCUMENTS file and, with it, the active phase of a workflow only starts with the first action.

Incoming connections are not allowed with start nodes. Only a connection that does not represent an escalation transition may emanate from it. If you want to return to the initial state during modeling, you will have to create a connection to an initial state (Fig. 101).



Fig. 101: Start node and returning to an initial state

You can also define *field values* for the exit with the start node.

3.11 End node

Each workflow must have at least one *end node* (Fig. 102). No connections may emanate from an end note; however, multiple connections may end there.

If no separate label is allocated for the end node as well as for the control flow leading to it, the button label "Finish" will be used in *DOCUMENTS 4*.

🔟 End			×
Label	1		
Name	FinalState_15		
	└ Seal file		
	Delete file after processin	g	
	Archive file		
Field Values	Connections Description		
Incoming even	nt		
Name		Value	
New	Delete		
Ok	Cancel		

Fig. 102: End node details dialog

Seal file

When you enable this option, the DOCUMENTS file will be sealed at workflow's end, i.e. locked against any other form of editing within and also outside of the workflow.

This setting will be ignored if the workflow has been called as a subworkflow because the end state of the called workflow is interpreted only as a step out signal in the calling workflow. Sealing the DOCUMENTS file must then be activated in the calling workflow.

Delete file

When this option is enabled, the DOCUMENTS file will be deleted with the workflow end. This option is used in particular when the DOCUMENTS file has been moved to an archive with a send signal.

File deletion will not be executed if the workflow has been embedded as a subworkflow, because the end state of the called workflow is only interpreted as a return signal in the calling workflow. If you want to delete the DOCUMENTS file, you must set this in the calling workflow.

You can also define *field values* for the receipt of the end node. Moreover, the "*connections*" tab lists the incoming connections.

Archive file

As of version 2.0. the option to specify archiving a DOCUMENTS file directly on the details dialog is available. This requires that the corresponding archive has been assigned to the file type in the DOCUMENTS Manager (Fig. 103).

File type: ftRecord (peachit_fi200700000)	03506) *	
General Advanced settings Workflow Arch	niving Actions Scripting	Properties
Archiving		
Destination server peachitStore1		•
🗹 Archive status	🔽 Archive monitor	🔽 Archive document meta-data

Fig. 103: Assigning an archive for a file type

Alternatively, this can be remedied in earlier workflow versions in that a send signal including archiving is modeled before the end shape.

4.1 Export

After specification of the workflow items you can perform the export on the DOCUMENTS server by pressing the corresponding button "*Export to Documents*" in the workflow dialog. You can also start this process from the workflow shape context menu. Here you also login on the server; finally, a transfer message appears.

4.2 Error messages during export

Errors on exporting a workflow are also logged and displayed in a list after transfer. The respective list entry allows opening the related details dialog for correction. The error messages can be written TAB-separated in a data file via "*Save as*".

Fehlermeldungen				×	
VisioShape-Id	Technischer Name Name		Wert	Fehlermeldung	
Kontrollfluss.61 - She	ControlFlow_5	AutoComment	Kommentar Komm	Die Zeichenkette AutoComr	
	<mark>⊖ Kon</mark> Be	trollfluss zeichnung			
		Name ControlFlow_5			
	Allger Wä	Allgemein Zugriff Feldbelegung Beschreibung Wächter			
<	Fehle	ermeldung			
<u>S</u> chließen Speicher	n unter Anz	eige Interaktion	selement Funktionskna	opf	
	к	N. ommentar <u>Kommen</u>	avigation Mappe beibe tar Kommentar Komm e Ok	halten 👤	

Fig. 104: List containing error messages during export

The presence of errors does not mean (!) that the workflow has not been created. Ordinarily, the workflow is not created, where erroneous values are not or incorrectly set. The error messages will be displayed in workflows as of this version 1.3.8 if the workflow has been created via the installed Visio document template. In earlier created workflows, the display can be activated by selecting the workflow shape using the mouse and opening the ShapeSheet via "*Main menu -> Window -> Display ShapeSheet*" (Visio 2002/2003). In the workflow ShapeSheet, you then need to set the field next to "*ServerMessages*" on the right to the value "*error*" and save the Visio drawing (Fig. 105).

0		0.05 0.1
ىلىسى ب		
	Workflow_1 Fügen Sie hier eine Bi	eschreibung ein
	🔜 langs.vsd:Zeichenblat	tt-1:Workflow.47 <shape></shape>
	Benutzer.WFMAlias_Custom	RH
	Benutzer.WFMArchives	TH .
	enutzer.WFMArchives_Custom	TH .
	Benutzer.WFMFolders	"Rechnungsarchiv;SEARCH;"
	Benutzer.WFMFolders_Custom	NH .
	Benutzer.WFMFiletypes	"cmsWebContent;EingangsrechnungPos;hrApplicationForLeave;hrEmployee;hrRec
	nutzer.WFMFiletypes_Custom	III
	Benutzer.WFMFields	III
	Benutzer.WFMFields_Custom	10
	Benutzer.WFMRegisters	ER
	nutzer.WFMRegisters_Custom	RR
	Benutzer.Filetype	"hrEmployee"
	Benutzer.TechName	"Workflow_1"
	Benutzer.Version	"1.30"
	Benutzer.ServerMessages	"error"
	Benutzer.WFMWorkflows	"de:Auftragsbearbeitung\;en:order processing-1;Rechnungseingang-1;WFApplicat

Fig. 105: Option for activating error display

4.3 Workflow file type

In the last step the workflow must be linked to the file type to which it refers. Log on to the server via the DOCUMENTS Manager and select the file type (Fig. 106) you want to work with, e.g. "ftInvoice".



Fig. 106: Selecting the file type

Open the associated details dialog (Fig. 107) by double-clicking or by pressing the spacebar. Next, on the "*File type*" tab of the dialog, you click the table icon with the workflow relationship.

General Advanced settings	Workflow Archiving Actions Scripting Properties
)) (orkflow	
Default distribution list	2 📼 🗴
Derault distribution list	I I I I I I I I I I I I I I I I
Workflow	i 🖉 🗐 😤

Fig. 107: The "File Type" tab including the "Workflow" relationship

In the selection dialog, which displays all available workflows, choose the workflow to be connected to the "*Default*" file type.

This workflow is the default workflow for the file type. For example, it will be displayed on creating a new DOCUMENTS file when defining the file type for the new DOCUMENTS file.

When you load a changed drawing of the default workflow to the server via Visio[®], this relationship will be automatically reset throughout all file types to which this workflow was assigned as the default workflow. Whereas if a workflow is already connected to the file type and if you export a completely new workflow,

the relationship will not be set, i.e. the relationship to the default workflow still exists.

The latter also applies when you have created a new "*workflow version*" via the workflow shape or changed the "*name*" of the workflow. Both cause the internally used *IDs* to change; the relationship is not set.

📇 Selection	party of the second	19 Jacob		×
Search <all t<="" th=""><th>ext columns></th><th></th><th>•</th><th>🍸 😂 🛛 🖀</th></all>	ext columns>		•	🍸 😂 🛛 🖀
Туре	Name	Version	TechnicalName	Description
WFMWorkflow	de:Urlaubsantrag;en:Vacation App	2	WFApplicationForLeave	Bearbeitung
WFMWorkflow	de:Krankmeldung;en:Sick.certificate;	2	WFSickCertificate	Behandlung
WFMWorkflow	en:Invoice Processing;de:Rechnu	1	InvoiceProcessing	
WFMWorkflow	de:Auftragsbearbeitung;en:Order p	2	OrderProcessing	Abbildung de
•				•
Select	Cancel	2		

Fig. 108: Workflows selection dialog

After pressing the select button, the image seen in Fig. 109 should emerge:

) (addition	
Default distribution list	.
Workflow InvoiceProcessing-1	

Fig. 109: The set workflow relationship

After that, you click "*OK*" to confirm the details dialog of the "*Default*" file type to save the changes you made.

4.4 Release workflow

As of version 2.0, the workflow can be automatically released by enabling the *Release* option on the workflow shape prior to the export (Fig. 110).

DOCUMENTS WORKFLOW Version 2.00	
Label Workflowname	
Name Workflow_1 Version	pgCommon Knoten Übergänge Eigenschaften
General Description	
	Released
Language C German 📀 English	
Shape-Text Technical Name	Type WFMWorkflow
Write shape autocomments	News No. 10
Remove exclusive write lock	Name Workflowname
Release	Version 1
File Type	
Import from Documents	TechnicalName Workflow_1

Fig. 110: Releasing a workflow in Visio and in the DOCUMENTS Manager

4.5 Download workflow

As of version 2.0, a copy of the Visio drawing is automatically copied to the server, and saved under the technical name of the workflow. In doing so, the copy is overwritten for each new export.

If you want to revert to this drawing at a later time, the workflow shape's download button can be used to read a list of workflows existing on the server and, after selection, save a drawing (Fig. 111).

DOCUMENTS WORKFLO	OW Version 2.00	×	
Label Workflownam	8		
Name Workflow_1	Workflow Download		×
Countly in 1	Name-Version	Visio-Sheet	
General Description	InvoiceProcessing-1	InvoiceProc	essing
	OrderProcessing-2	OrderProce	ssing
Language C. Commun	WFApplicationForLeave-2		
Language C German	WFSickCertificate-2		
Shape-Text Technical N	Workflow_1-1	Workflow_1	
Write sha			
E Remove e			
E Release			
The Trees International			
File Type Itt:mployee			
law	J		
Exp	Download	Abbrechen	
	Download		
Cueste	new work flow version		
	TOT TO ADDIT TO SHE		
Ok Cancel			

Fig. 111: Downloading the Visio drawing of a workflow

The download can also be executed via the DOCUMENTS Manager by opening the folder icon in the *Visio model* field in the workflow details dialog, and then saving the data file.

🐓 DOCUMENTS Manager User: Administrator (PeachIT	DEMOPORTAL) [localhost:11000]			
Application Server settings Administration Documents Help				
New 🔗 Edit 😒 Update 🗙 Delete 🖴 Print 🖓 Configure				
WEMWORKTIOW				
Administration				
User Management	WFMWorkflow (Workflow 1-1)			
Documents	2 2			
Public Folders (4 Entri 🔐 Workflow_1-1 - WFM	Workflow 8 00			
Archive servers (2 Ent pgCommon Knoten Üt	bergänge Eigenschaften pgDescription Zugriffsrechte			
Views (3 Entries)				
Archives and scheme	Released			
- June Type View folders (0 Entrie Type View Folders (0 Entrie	WFMWorkflow			
Distribution Lists (0 E	Workflowname			
Workflows (5 Entries)				
WESickCertificate				
RechnicalName	Workflow_1			
	il the second			
Number ranges (1 En Visio sheet				
Outbar (0 Entries) Visio image Securities (24 Entries)	🔹 Save As			
Processes (22 Entries) Visio HTML	Search manager			
Scratch Copy (0 Entri				
Scratch Copy (Archiv OK Apply	File name: Workflow_1			
Deleted Processes (0	Save as type: All files (*.*)			
	Browse Folders Cancel			

Fig. 112: Downloading the Vision drawing of a workflow via the DOCUMENTS Manager

4.6 Workflow HTML and image

In the DOCUMENTS Manager, a screenshot of the Visio drawing as well as parts of an HTML representation of the workflow are saved in the *Visio Image* and *Visio HTML* fields. These are automatically created during export; they should be used in a later version to illustrate the workflow step in DOCUMENTS 4.

5. Index

% 35

<archive></archive>	54
Absolute time	33
Administrator	4
Action 20,	25
Alias	27
Processing	26
User	27
Recipient	27
Group	27
File assignment	27
Action list	31
Alias	27
Login	8
Display	
Ergonomic name	15
Technical name	15
Calendar 33, 44,	62
Archive	
enabled	9
Monitor	54
Status	54
Transmission	54
Archiving	54
asynchronous	28
Attachment	54
Task	30
Tasks folder	66
Expenditure	31
hide	36
Tab	38
Run	63
Execution	
asynchronous	28
synchronous	28
Auto Texts	69
Backup	80
Edit mask	30
Condition	42
Occurring as a signal	57
else	71
Decision	71
Control flow	42
User	9
Description	24

Confirmation message		.44
Name		
ergonomic		.15
technical		.15
technical (filtered)		.15
Label	.10,	24
multilingual		.24
Button		.45
Arrangement		.45
Label		.45
Function button		.47
Button label		.74
Copy & Paste		.20
Database		.11
File import		8
Decision	.42,	71
Delegate		.32
Deselect		.20
Forward immediately		.48
DOCUMENTS settings		
Workflow		7
Document templates		9
Document tabs		9
Document template		4
Download	16,	80
Drag & Drop		.17
dynamic		
Action		.28
E-mail (signal)		.54
Escalation		.34
Change file type		.55
Subworkflow		.59
Inbox	.48,	50
Inbox folder		.47
Group		.54
else		.71
E-mail		.53
E-mail notification		.31
E-mail notification message		.32
Recipient		.27
Recipient list		.27
End node		.21
Decision	.42,	69
Either or		.68
Initial startup		4

Escalation				32
Escalation type				32
Escalation transition		41,	44.	74
Escalation time		· · · · · ·	33.	44
Exclusive write protection			13,	16
Export			·····	77
Error messages				77
Export without documents				52
Error message				42
Export				77
Field values			34.	50
Field values list			,	35
Fields			36.	38
Field name			,	28
Field names				36
Field references				35
Release			16	80
Function button			,	47
Sent Items folder				48
Group				27
Dissolving groups				29
Group resolution				29
Crouping				23
Guard	••••			42
Power user	••••			-2
Id11 20 79	••••			
Name change				25
Initiator	••••			22
Installation				<u>ع</u> د
Interactive element	••••			- 47
Function button	••••			47 17
Drop. down list	••••			47 17
lava script	 0	26	56	4/ 50
	9,	50,	50,	20
Check password	••••			77
Comment 30 /	 17	57	50	63
Context menu	r7,	57,	59,	7
Control flow	••••		17	/ //1
Web front and	••••		17,	41
Control flow condition	••••			40
Conviliat	••••			71 21
Copy list	••••			20
Read/write	••••			0 0 0
Line routing	••••			10
Import lists	••••			19
list import	••••			ة ق م
	••••			0 0
Mail subject	••••			0 22
Mail mossage text	••••			ว2 วา
man message text	••••	• • • • • •	•••••	52

Principal		9
Archive file		.76
Keep file		.47
Delete file	61,	75
File OK		.47
Seal file	61,	75
File view		.47
Inbox folder		.47
Keep file		.47
File creator		.32
File view		
For overview		.47
File type8,	55,	78
Default workflow		.79
Change file type	54,	60
File assignment		.27
dynamic		.28
static	••••	See
Multiple selection	20,	36
Multiple languages10, 24, 30,	45,	46
Merge		.71
Monitor information		
XML export		.52
Monitor list	59,	72
Multiplicity		.42
Mandatory field	•••••	.36
То	•••••	.50
To shape	•••••	.40
Name	9,	24
Uniqueness	•••••	.25
Java-compliant	•••••	.25
UserExit	•••••	.25
Navigation	47,	66
Number	See	ld
Read-only	•••••	.36
OR branches	•••••	.67
Operation	41,	72
Folder	•••••	9
Parallelization type	•••••	.68
Parallel branching	•••••	.64
Path	•••••	.53
Port	•••••	9
PortalScripts	•••••	.35
Readme.txt	•••••	4
Tab	•••••	.37
Order		
Connections		.40
recursive		.60
Prompt	•••••	.48

Return value	43
Return signal	75
runscript	36
RW	36
RWM	36
Stencil	17
Read/write access	38
Write protection	16
Script	43
Server	9
Shape comments	11
Shape text	15
Move shape texts	22
Packup conv	22
Vicibility	00 4 7
VISIDILITY	43
visibility condition	44
Signal	52
Archiving	54
Group	54
E-mail	53
Change file type	54
XML export	52
Send Signal	51
Receive Signal	57
Signal type	54
Language setting	6
Default pointer	22
Start node17,	73
outgoing connection	17
incoming connection	17
static	
Action	27
Archive	54
F_mail (signal)	54
Escalation	34
Change file type	54
Subworkflow	22
	29
status	38
Status information	
XML export	52
Subworkflow56,	59
Delete file	76
synchronous	28
Synchronization point	64
Keyboard shortcuts	
straight connection lines	17
right angled connection	18
Enlarge drawing sheet	17
Substring	66

Text processing mode	22
Timestamp	33
Tooltips	11
Туре	
Signal	52
Transition	42
Overview	
UTE-8	6
Connections 39	50
Arrangement	40
Connection lines	17
Connected nodes	50
Version	
1	
Task	30
Commont	
multilingual label	50 ∧⊂
1 multiingual laber	, 24
	21
E-mail notification	12
Shape comments	
Shape text	15
Access and visibility	44
Exclusive write protection	13
Name check	25
Delay	61
l Description	
Description Quatation mark	10
Quotation mark	
Г Бала ала ала ала ала ала ала ала ала ала	
Error messages	//
2	~~
Download	80
Archive file	/6
Name length	25
UTF-8	6
Delay	
Absolute time	63
Time unit Absolute	44
Version number11	, 59
Delay	61
From shape	40
Guard	42
Alert color	17
Web front-end	45
Representation	47
Interactive element	47
Order	40
Forward	30

FUI Waluel
Escalation transition48
Routed page48
Workflow6, 7
Label10, 11
download16
Download80
End state22
release
Release80
Image81
Brief description10
Import lists
File type
Name 11
Positioning7
Locale6

Version	11
Version number	11
Drawing sheet	17
Workflow HTML	81
Workflow shape	6
XML export	52
Drawing sheet	17
Length of time	44
Time unit	33, 44
Time	32
Timestamp	33
Handle	18
Access	38, 43
Access code	36
For overview	47
Merge	69

Fig. 1: Links on the program menu created by the installation	4
Fig. 2: Customize file locations for stencils and templates on Visio 2010 "File	<- ڊ
Advanced -> File locations -> Templates and Stencils path"	5
Fig. 3: Workflow shape with context menu	7
Fig. 4: The Workflow details dialog	7
Fig. 5: File types in DOCUMENTS	8
Fig. 6: Login dialog	9
Fig. 7: Performing list import from DOCUMENTS	. 10
Fig. 8: The Workflow details dialog including the "Label", "Name" a	and
"Description" fields	. 10
Fig. 9: Automatically generated shape comments	. 12
Fig. 10: Remove exclusive write lock for the entire workflow	. 13
Fig. 11: Exclusive write lock on an action	. 14
Fig. 12: Exclusive write lock for "Send Signal, Receive Signal, Action and Delay	. 15
Fig. 13: Details dialog for workflow shape version 1.3.4	. 15
Fig. 14: Specifying the portal languages in the principal dialog	. 16
Fig. 15: Selecting the GUI-Label of the shape text in the Workflow dialog	. 16
Fig. 16: Switching display mode via the workflow shape's context menu	. 16
Fig. 17: Insert control flow	. 18
Fig. 18: Dragging at the end point, keeping the Shift key depressed	. 19
Fig. 19: Simple dragging at the handle for rectangular redirections	. 19
Fig. 20: Dragging at the handle, keeping the Shift key depressed	. 19
Fig. 21: Dragging at the handle (Control flow center), keeping the Ctrl	key
depressed, for right-angle connection lines	. 20
Fig. 22: Dragging at the top right handle, keeping the Ctrl key depressed, until	the
dotted line has the desired shape.	. 20
Fig. 23: Dragging at the bottom right handle, keeping the Ctrl key depressed.	The
dotted line indicates the new line routing.	. 20
Fig. 24: Storing and connecting start node, control flow and action	. 21
Fig. 25: Storing two shapes on the drawing sheet	. 21
Fig. 26: Connecting a control flow to an action	. 22
Fig. 27: Storing and connecting control flow and end nodes	. 22
Fig. 28: "Default" toolbar -> Rotate text block, move moving marker on the sha	ape
text to the desired position, keeping the left mouse button depressed	. 23
Fig. 29: Next, select "default pointer" (pointer tool)	. 23
Fig. 30: "Documents -> Settings -> ->Locale/format"	. 25
Fig. 31: Principal -> Settings -> Portal languages	. 26
Fig. 32: Action details dialog	. 27
Fig. 33: Processing type of an action	. 28
Fig. 34: Processing is statically assigned to the "PersonnelManager" alias	. 28
Fig. 35: Processing is performed by a user, dynamically assigned from	the
"HRCustomer" field	. 29
Fig. 36: "Asynchronous" and "synchronous" execution	. 29
Fig. 37: Asynchronous informing of a group	. 29
Fig. 38: Display group name and group member with disabled dissolution	. 30
Fig. 39: Display all group members with Dissolve group enabled	. 30
Fig. 40: Shape text with actions	. 30

Fig. 41: Task - Web	31
Fig. 42: Monitor list – task and comment - Web	31
Fig. 43: Action list – copy list - Web	31
Fig. 44: Turning mail notification on/off	32
Fig. 45: Escalation type	32
Fig. 46: Escalation – File editing is assigned to "Oppen, Bernhard"	33
Fig. 47: Settings for the calendar	34
Fig. 48: DOCUMENTS settings -> ->Locale/format	35
Fig. 49: Field values for the "Priority" field	36
Fig. 50: Field values list for Inbox	36
Fig. 51: Setting a field receipt value through Java script	37
Fig. 52: Selecting the fields and specifying the access rights for "Selected field	s" 38
Fig. 53: Error message for mandatory fields, e.g. "Contact persons" field	38
Fig. 54: Tab view in DOCUMENTS 4	
Fig. 55: Selecting the tabs and defining tab access	
Fig. 56: Incoming and outgoing connections with arrangement option	40
Fig. 57: Connection order and arrangement of buttons in Web front-end	41
Fig. 58: Control flow details dialog	42
Fig. 59: Scrint-hased conditional check	43
Fig. 60: Controlling access and visibility with control flows and operations	13 44
Fig. 61: Timings for an escalation transition	11
Fig. 62: Control flow name and button labels in workflow step "Action 10"	45 46
Fig. 63: DOCUMENTS settings -> Locale/format	40 17
Fig. 64: Principal -> Settings -> Portal languages	47 17
Fig. 65: Rendering ontions: Function button and dron-down list	/ ب
Fig. 66: Monitor list	0+ ۸۷
	40
Fig. 67: Routed page	50
Fig. 67: Routed page	50 51
Fig. 67: Routed page Fig. 68: "File OK" – enquiry and forwarders Fig. 60: Polationship to the podes that the control flow connects	50 51
Fig. 67: Routed page Fig. 68: "File OK" – enquiry and forwarders Fig. 69: Relationship to the nodes that the control flow connects	50 51 52
Fig. 67: Routed page Fig. 68: "File OK" – enquiry and forwarders Fig. 69: Relationship to the nodes that the control flow connects Fig. 70: Send Signal details dialog Fig. 71: Sond signal type	50 51 52 53
 Fig. 67: Routed page Fig. 68: "File OK" – enquiry and forwarders Fig. 69: Relationship to the nodes that the control flow connects Fig. 70: Send Signal details dialog Fig. 71: Send signal type Fig. 72: YML export including export of status and monitor information 	50 51 52 53 54
 Fig. 67: Routed page Fig. 68: "File OK" – enquiry and forwarders Fig. 69: Relationship to the nodes that the control flow connects Fig. 70: Send Signal details dialog Fig. 71: Send signal type Fig. 72: XML export including export of status and monitor information Fig. 72: Exported monitor list and exported status information 	50 51 52 53 54 54
 Fig. 67: Routed page Fig. 68: "File OK" – enquiry and forwarders Fig. 69: Relationship to the nodes that the control flow connects Fig. 70: Send Signal details dialog Fig. 71: Send signal type Fig. 72: XML export including export of status and monitor information Fig. 73: Exported monitor list and exported status information 	50 51 52 53 54 54 55
 Fig. 67: Routed page Fig. 68: "File OK" – enquiry and forwarders Fig. 69: Relationship to the nodes that the control flow connects Fig. 70: Send Signal details dialog Fig. 71: Send signal type Fig. 72: XML export including export of status and monitor information Fig. 73: Exported monitor list and exported status information Fig. 74: Example of an XML file from export 	50 51 52 53 54 54 55 55
 Fig. 67: Routed page Fig. 68: "File OK" – enquiry and forwarders Fig. 69: Relationship to the nodes that the control flow connects Fig. 70: Send Signal details dialog Fig. 71: Send signal type Fig. 72: XML export including export of status and monitor information Fig. 73: Exported monitor list and exported status information Fig. 74: Example of an XML file from export Fig. 75: Signal type –E-mail 	50 51 52 53 54 55 55 56
 Fig. 67: Routed page Fig. 68: "File OK" – enquiry and forwarders Fig. 69: Relationship to the nodes that the control flow connects Fig. 70: Send Signal details dialog Fig. 71: Send signal type Fig. 72: XML export including export of status and monitor information Fig. 73: Exported monitor list and exported status information Fig. 74: Example of an XML file from export Fig. 75: Signal type –E-mail Fig. 76: Archive monitor, as well as destination server and target archive selection 	50 51 52 53 54 54 55 55 56 ection
 Fig. 67: Routed page Fig. 68: "File OK" – enquiry and forwarders Fig. 69: Relationship to the nodes that the control flow connects Fig. 70: Send Signal details dialog Fig. 71: Send signal type Fig. 72: XML export including export of status and monitor information Fig. 73: Exported monitor list and exported status information Fig. 74: Example of an XML file from export Fig. 75: Signal type –E-mail Fig. 76: Archive monitor, as well as destination server and target archive sele 	50 51 52 53 54 55 55 56 ection 56
 Fig. 67: Routed page Fig. 68: "File OK" – enquiry and forwarders Fig. 69: Relationship to the nodes that the control flow connects Fig. 70: Send Signal details dialog	50 51 52 53 54 55 55 56 ection 56 57
 Fig. 67: Routed page Fig. 68: "File OK" – enquiry and forwarders Fig. 69: Relationship to the nodes that the control flow connects Fig. 70: Send Signal details dialog Fig. 71: Send signal type Fig. 72: XML export including export of status and monitor information Fig. 73: Exported monitor list and exported status information Fig. 74: Example of an XML file from export Fig. 75: Signal type –E-mail Fig. 76: Archive monitor, as well as destination server and target archive sele Fig. 77: Change filetype dynamically Fig. 78: Change file type, and subworkflow 	50 51 52 53 54 55 55 56 ection 56 57 58
 Fig. 67: Routed page Fig. 68: "File OK" – enquiry and forwarders	50 51 52 53 54 55 55 56 ection 56 ection 57 58 59
 Fig. 67: Routed page	50 51 52 53 54 55 55 56 ection 56 ection 56 57 58 59 60
 Fig. 67: Routed page Fig. 68: "File OK" – enquiry and forwarders	50 51 52 53 54 55 56 ection 56 ection 57 58 59 60 61
 Fig. 67: Routed page Fig. 68: "File OK" – enquiry and forwarders Fig. 69: Relationship to the nodes that the control flow connects Fig. 70: Send Signal details dialog	50 51 52 53 54 55 55 56 ection 56 ection 56 ection 57 58 59 60 61 62
 Fig. 67: Routed page Fig. 68: "File OK" – enquiry and forwarders	50 51 52 53 54 55 55 56 ection 56 ection 56 57 58 59 60 61 62 matic
 Fig. 67: Routed page	50 51 52 53 54 55 55 56 ection 57 56 ection 57 58 59 60 61 62 matic 63
 Fig. 67: Routed page Fig. 68: "File OK" – enquiry and forwarders	50 51 52 53 54 55 55 56 ection 56 ection 56 ection 57 58 59 60 61 62 matic 63 64
 Fig. 67: Routed page Fig. 68: "File OK" – enquiry and forwarders	50 51 52 53 54 55 55 56 ection 56 ection 56 ection 57 58 60 61 62 matic 63 64 65
 Fig. 67: Routed page Fig. 68: "File OK" – enquiry and forwarders Fig. 69: Relationship to the nodes that the control flow connects Fig. 70: Send Signal details dialog	50 51 52 53 54 55 55 55 56 ection 56 ection 56 ection 57 58 60 61 62 matic 63 65 66
 Fig. 67: Routed page Fig. 68: "File OK" – enquiry and forwarders Fig. 69: Relationship to the nodes that the control flow connects Fig. 70: Send Signal details dialog	50 51 52 53 54 55 55 56 ection 56 ection 56 ection 57 58 59 60 61 62 matic 63 64 65 67
Fig. 67: Routed page Fig. 68: "File OK" – enquiry and forwarders Fig. 69: Relationship to the nodes that the control flow connects Fig. 70: Send Signal details dialog Fig. 71: Send signal type Fig. 72: XML export including export of status and monitor information Fig. 73: Exported monitor list and exported status information Fig. 74: Example of an XML file from export Fig. 75: Signal type –E-mail Fig. 76: Archive monitor, as well as destination server and target archive sele Fig. 77: Change filetype dynamically Fig. 78: Change file type, and subworkflow Fig. 79: Executing server-side Java scripts Fig. 80: Receive Signal details dialog Fig. 81: Subworkflow details dialog Fig. 82: Change file type on using subworkflows Fig. 83: Delay shape including ergonomic and technical name as well as auto shape comment Fig. 84: Details dialog of a delay shape Fig. 85: Global settings->Calendar Fig. 86: Modeling simultaneous sequence and synchronization Fig. 88: Start and end for substrings "String 1" and "String 2"	50 51 52 53 54 55 55 56 ection 56 ection 56 ection 56 ection 57 58 59 60 61 62 matic 63 65 67 67

Fig. 90: Details dialogs – simultaneous sequence and synchronization	. 69
Fig. 91: OR parallel and OR synchronization shapes	. 70
Fig. 92: Toggle between OR and conventional functionality by enabling/disab	ling
the "Or" option	. 70
Fig. 93: Parallelization type and its representation in the dialog title	. 71
Fig. 94: Details dialog – Merge - Decision	. 72
Fig. 95: Merge decision	. 73
Fig. 96: Control flow condition	. 73
Fig. 97: Decision and merge chain in a workflow	. 74
Fig. 98: Appearance for decision/merge	. 74
Fig. 99: Splitting an item into two functionally separate items	. 75
Fig. 100: Start node details dialog	. 76
Fig. 101: Start node and returning to an initial state	. 77
Fig. 102: End node details dialog	. 78
Fig. 103: Assigning an archive for a file type	. 79
Fig. 104: List containing error messages during export	. 80
Fig. 105: Option for activating error display	. 81
Fig. 106: Selecting the file type	. 82
Fig. 107: The "File Type" tab including the "Workflow" relationship	. 82
Fig. 108: Workflows selection dialog	. 83
Fig. 109: The set workflow relationship	. 83
Fig. 110: Releasing a workflow in Visio and in the DOCUMENTS Manager	. 84
Fig. 111: Downloading the Visio drawing of a workflow	. 84
Fig. 112: Downloading the Vision drawing of a workflow via the DOCUMEI	NTS
Manager	. 85