Arco

Doma 6
Application administrator manual
05. Routing Procedures & Case Categories

A new era in document management.

Doma 6

Application administrator manual

05. Routing Procedures & Case Categories

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Author: Arco Training Dept. - Kris Steenackers

Manual Modification Follow-Up

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Contents

Omega Business Park www.arco.be t +32 (0)15 289 030
Wayenborgstraat 24 – B-2800 Mechelen info@arco.be f +32 (0)15 289 031

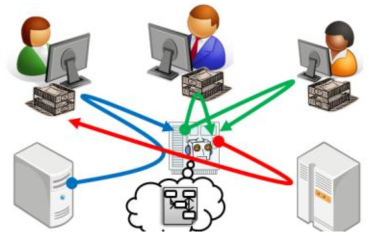
1 Introduction

The Arco Doma suite consists of 2 major parts: Arco DocRoom and Arco Routing.

DocRoom is Arco's document management system: it is a computer system used to track and store electronic documents and/or images of paper documents, providing storage, versioning, metadata, security, as well as indexing and retrieval capabilities.

Routing is Arco's workflow management system: it is a computer system used to create, execute and follow-up workflow procedures.

What is workflow?



Workflow is the automation of a business process, in whole or part, during which documents, information or tasks are passed from one participant to another for action, according to a set of procedural rules.

Workflows are created in a workflow management system, i.e. a system that defines, creates and manages the execution of workflows through the use of software, running on one or more workflow engines, which is able to interpret the process definition, interact with workflow participants and, where required, invoke the use of IT tools and applications.

In a workflow an object has to follow a predefined route (flow). A predefined route is called a ***Procedure.*** A procedure is built out of several **steps**. Each step represents a certain moment in the procedure.

- *A **procedure** is not a DocRoom object, which means that a procedure case will not automatically be stored in DocRoom when it’s not active anymore.*

- A *Procedure* has its own
  - ***Properties*** (fields)
  - ***Packages*** *(document placeholder)*

Arco Routing can be used for

- **Document oriented workflow**
  - Create/update/delete a document by using a workflow
  - Document retrievable in DocRoom from procedure start
  - Document runs through a procedure before being published as a document

- **Process oriented workflow -** *Define your business process in Routing*
  - Automization of certain steps
  - Easy follow-up using workflow search screens
  - Reporting using external reporting tools

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2 About Procedures, Workflow Categories and documents with an insert procedure

2.1 Introduction

Since version 6, DocRoom and Routing are integrated in one central web interface, using one URL.

From that moment, it is possible to visualize procedures in the DocRoom tree structure.

2.2 WorkFlow categories

Procedures that can be started from and visualized in the DocRoom part are called ***WorkFlow categories***. They behave as DocRoom objects but are also visible in the Routing screens. (Technically, the DocRoom object Workflow Category uses a Routing insert procedure.)

When active, workflow categories are shown in the result lists of Routing and they can be found as an item in the DocRoom tree structure.

The difference between an active and an archived workflow category is also visualized by using separate icons for the 2:

-  for workflow categories with an active insert procedure.
-  for workflow categories with an archived insert procedure.

Once archived, they can be found in the Routing archive and they remain available in the DocRoom tree structure.

2.3 Procedures

For backwards compatibility, 'classic' procedures can still be defined. Typical for a ***procedure*** is that it is only visible in the Routing part of Doma.

2.4 Documents with an insert procedure

Next to procedures and workflow categories, we can create a document using an insert procedure. When doing this, a procedure will be started on document creation.
As long as the procedure has not been ended, the document will have the status *in creation*.
It is visible in the DocRoom tree structure and as long that it runs through the procedure, it can also be found in the Routing result lists.
Once the procedure has ended, it is a normal document in production.

2.5 Overview: procedure vs. workflow category vs. document with insert procedure

2.5.1 Document with insert procedure vs. workflow category

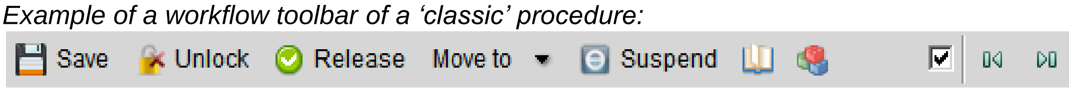
Document	WorkFlow Category
• **A document created with an insert procedure is presented as a document in creation in the DocRoom library ( ).**	• A workflow category is presented in the DocRoom Library with the same icon as a routing procedure case ( ). *Once created, it remains recognizable by its icon, which is the same as the icon for an archived case ( ).*
• **Once created, a document can have several versions.**	• A workflow category has no versioning.
• **Can have document properties, pool properties and procedure properties. *Procedure properties are not shown on document level once the document has been created.***	• Can have workflow category properties, pool properties and procedure properties. *All properties are at all time available in the* workflow *category detail.*
• **Procedure properties are not visualized on document level when the insert procedure has ended. (These can only be found in the Routing archive)**	• When the workflow category procedure has ended, all properties and their values remain visible in the DocRoom library (default behavior).

2.5.2 workflow category vs. procedure

WorkFlow Category	Procedure
• **Visible in the DocRoom folder where it was created and in Routing result lists. (My Work, My Dossiers, Open Dossiers, Archive).**	• Only visible in Routing result lists. (My Work, My Dossiers, Open Dossiers). Once ended, it can be found in the Routing Archive. *It is not possible to see a procedure case in the DocRoom Library.*
• **On creation (and also later), you can link one or more files to it without using a Routing package.**	• Routing package is necessary to link files. Files cannot be linked on creation.
• **Can have workflow category properties, pool properties and procedure properties.**	• Can only have procedure properties.
• **Workflow category detail screen toolbar can contain routing buttons and DocRoom buttons.**	• Procedure case detail screen toolbar can only contain routing buttons.

- *Example of a workflow category toolbar:*

- *Example of a workflow toolbar of a ‘classic’ procedure:*



2.5.3 When do I use

A procedure

This procedure is kept for backwards compatibility. Next to that, these type of procedures is also still used as insert procedure for documents.
Use a procedure when the process and its follow-up are important, but when it is not so important that the result of the process can also be found in the DocRoom library.

A workflow category

Used by default for procedure configuration since version 6.
Use a workflow category when it is important that the data of your procedure can also be retrieved in the DocRoom library, during the procedure but also when the workflow has ended.

A document with an insert procedure

Use a document with an insert procedure when it is important that a certain procedure is followed for the creation of a document, but when the result of the creation must be a document with all its characteristics.

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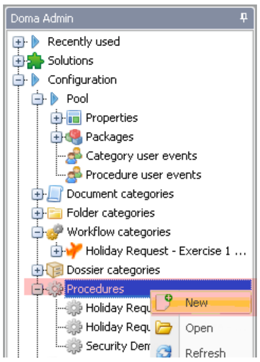
3 Doma admin: Procedures – overview of the procedure configuration screens in the Doma admin module

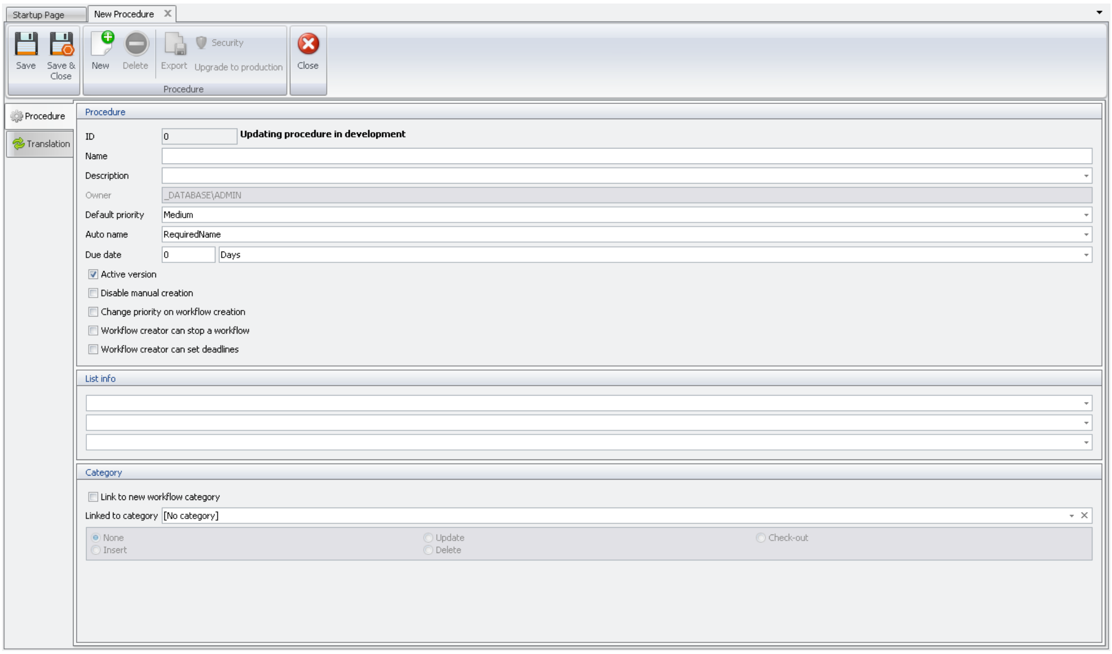
All Doma configuration is done in the Doma admin module. This client application is by default installed on the server. This tool can also be installed on local PC's.

3.1 Open configuration screen

Once the Doma admin module is started, select the item ***Procedures*** in the Doma admin navigation tree and click on the right mouse button. A menu appears. Select the option ***New***.



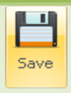
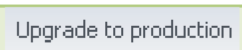
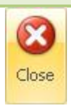
A new tab with the name ***New Procedure*** appears in the window at the right:



Enter a procedure name and click on the ***Save*** button in the ribbon above.
A number of extra tabs appear in the configuration tab of the procedure. The tab name has changed from new procedure to the actual procedure name.

3.2 Tab Procedure

3.2.1 Icon toolbar

Icon	Description
	Saves your changes.
	Saves your changes and closes the tab.
	Creates a new procedure in the current tab.
	Deletes the procedure.
	Export the procedure to a file.
	Edit the procedure security in a pop-up window.
	Status update: • Click on the option ***Upgrade to production*** to put the procedure in production. • Click on the option ***Downgrade to development*** to put the procedure in development.
	Close the current tab.

3.2.2 Configuration screen

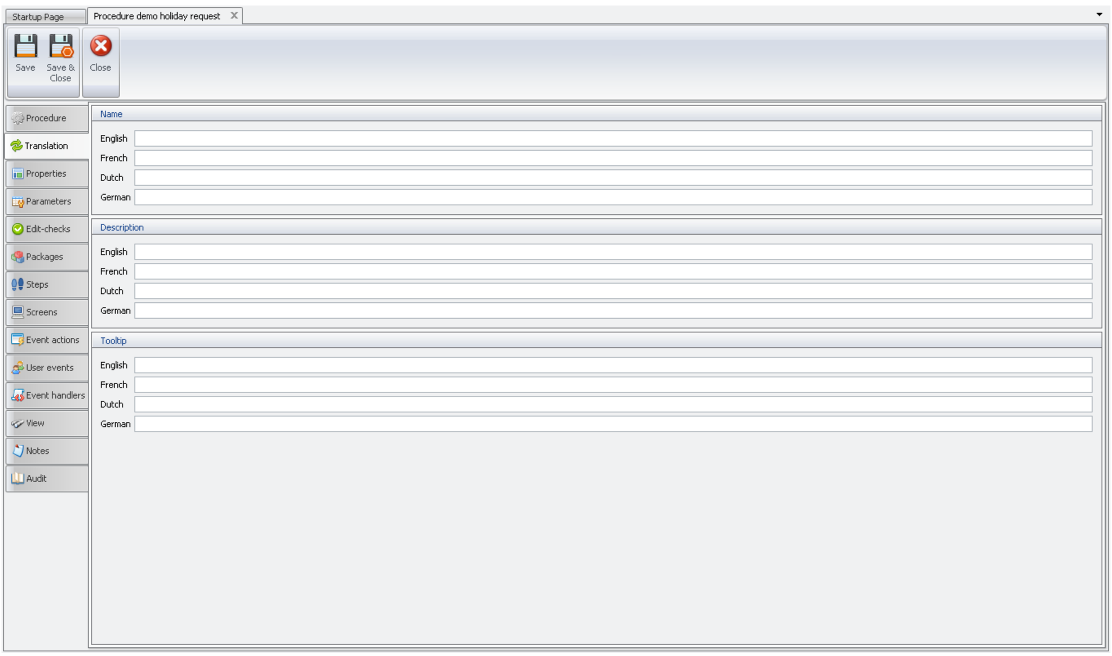
Field Name	Description	
ID	Read-only field. Shows the ID of the Procedure. This is created by the application.	
	Next to it, the *status* of the procedure appears:	
	Updating procedure in development	A procedure in development is only visible for users who have administrator rights on procedure level. When running a procedure in development: • Steps will be assigned to administrators instead of to the step executors. • Scripts will not be executed. • E-mail notifications will not be sent.
	Updating procedure in production	When a procedure is in production, it can be started by every user who has start rights or higher on procedure level.
Name	Name of the procedure.	
Description	(Non-obligatory) description of the procedure. This description can be shown in the step details.	

<table>
<tr><td>Owner</td><td colspan="2">Domain and the name of the creator of the procedure. (Read-only)</td></tr>
<tr><td>Default priority</td><td colspan="2">Default priority level of the procedure.
Each time that a new dossier is created, the dossier will get the priority level of the procedure. The higher the priority, the higher the dossier will appear in the work list of the user.
In the list My Work, the user can see the priority level of each task that is assigned to him/her.</td></tr>
<tr><td rowspan="4">Auto name</td><td>RequiredName
(Default value)</td><td>On creation, the user must add a name for the workflow.</td></tr>
<tr><td>Empty Name</td><td>On creation, the name of the workflow is left empty.</td></tr>
<tr><td>GUIDName</td><td>On creation, a GUID (Globally Unique Identifier, i.e. a unique name) is created by the application for the new workflow.</td></tr>
<tr><td>OptionalName</td><td>On creation, the user can but must not add a name for the workflow.</td></tr>
<tr><td>Due date</td><td colspan="2">Here you can set the period of time that the users get to complete the procedure. Enter a number in the first field and select the option (working) hours, (working) days or months in the next field.</td></tr>
<tr><td>Active version</td><td colspan="2">☑ When selected, this is the active version of the procedure.
Users with enough rights are able to start a workflow.
☐ If not selected, this procedure is a non-active version. This means it cannot be started anymore. Workflows that were started in this version will continue to run in this version of the procedure.</td></tr>
<tr><td>Disable manual creation</td><td colspan="2">☑ When selected, manual creation via the web interface is disabled, so users cannot create an item of this procedure in the web interface.
☐ If not selected, manual creation of a workflow is possible in the web interface.</td></tr>
<tr><td>Change priority on dossier creation</td><td colspan="2">☑ If this checkbox is selected, the dossier creator can change the priority.
☐ If not selected, the dossier will get the default priority level of the procedure.</td></tr>
<tr><td>Workflow creator can stop a dossier</td><td colspan="2">☑ If this checkbox is marked, the workflow creator can stop a workflow from the list My Dossiers in the web interface. This can only be done if the step executor is not coloured red in the list My Dossiers in the Web Interface.
☐ If this checkbox is not marked, the workflow creator cannot stop a workflow.</td></tr>
<tr><td>Workflow creator can set deadlines</td><td colspan="2">☑ When this checkbox is marked, the workflow creator can set/change the deadlines of the procedure and each step of the procedure.
☐ If the checkbox is not marked, the standard deadlines of the procedure and the steps will be active.</td></tr>
<tr><td>List info</td><td colspan="2">These 3 fields allow you to list the value of any property (properties) of the procedure in the screens My Work, My Dossiers and Open Dossiers. You can type any text in the fields. To visualize a value of a property, use the next syntax: [@nameoftheproperty@]. The value will be visualized in the web interface.</td></tr>
<tr><td>Category – link to new workflow category</td><td colspan="2">☑ When this checkbox is marked and the procedure is saved, a new workflow category is automatically created. A new configuration tab appears for the new category.
Procedure and new category are automatically linked and cannot be separated anymore.
☐ If this checkbox is not marked, the procedure is not linked to a</td></tr>
</table>

	workflow category.	
Linked to category	Dropdown list that contains all DocRoom categories where this procedure can be linked to. When a category is selected, a number of the radio button items *None*/*Insert / Update / Delete / Check-out* below will be enabled. These will define the relationship between this procedure and the category selected in this list.	
None/ Insert / Update / Delete / Check-out	**None**	No category is linked.
	Insert	The procedure is used as an insert procedure for the selected category. On creation of a new category item, this procedure will be started. During the procedure, the DocRoom status of the item will be *in creation*. When to procedure has ended, the new category item will have the DocRoom status *in production.*
	Update	The procedure is used as an update procedure for the selected category. On edit of a category item, this procedure will be started.
	Delete	The procedure is used as a procedure to delete the item of the selected category. When the user deletes the item in DocRoom, this procedure will be started.
	Check-out	The procedure is used as a check-out procedure for the selected category. When a DocRoom item of the selected category is checked-out, this procedure will be started.

3.3 Tab Translation

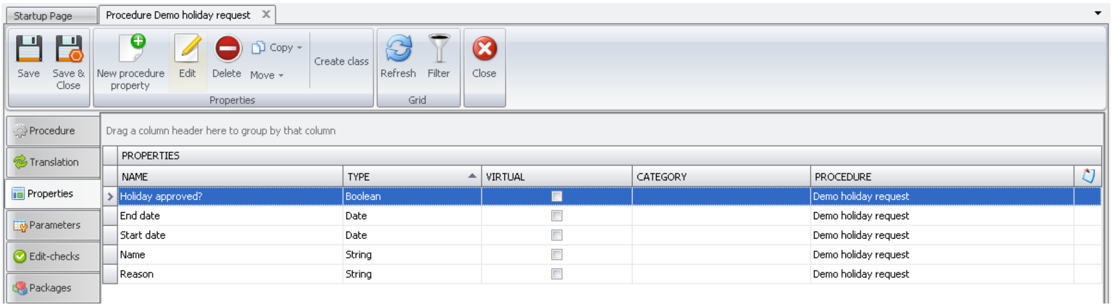
If the DocRoom or Routing interface is presented in different languages, the procedure name, description and tooltips can be translated in the languages that are used.
When the web user selects another language, the label will then appear in the selected language (if the language labels are completed).



Enter the translations of the case category/procedure name and description in the language fields under the headers *Name* and *Description*.
Enter the translations of the tooltips in the language fields under the header *Tooltip*.

3.4 Tab Properties

This tab shows all properties linked to the procedure.



From here you can:

- Add a procedure property to the procedure.
- Edit one of the properties in the list.
- Remove a property from the procedure.

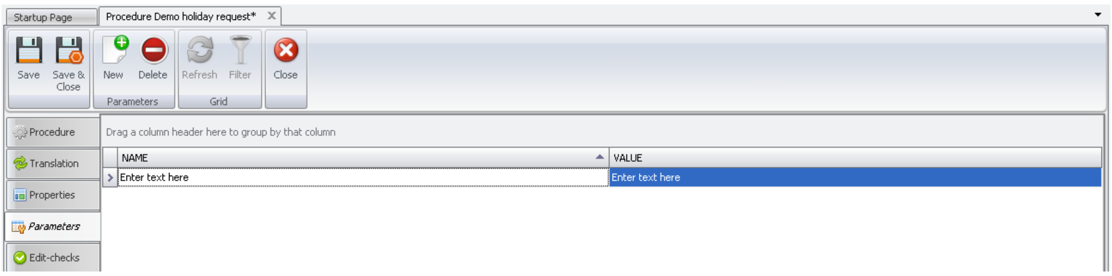
Remark:

It is not possible to add Pool properties or category properties to a 'classic' procedure.

Please see the manual *Doma 6 - Application Administrator Manual - 04 - Properties and Edit checks* for more information about properties.

3.5 Tab Parameters

Here you can define a list of parameters that otherwise would have to be created on database level.



The advantage of the parameters in this list is that also application administrators can administer the parameter list.
Scripting allows us to use these parameters in the workflow category or in its insert procedure.

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3.6 Tab Edit-checks

In this tab, you can define edit-checks.

Edit-checks can be defined on both category and procedure level. It is an easy way to configure validation checks on the data that has been filled in by the user.

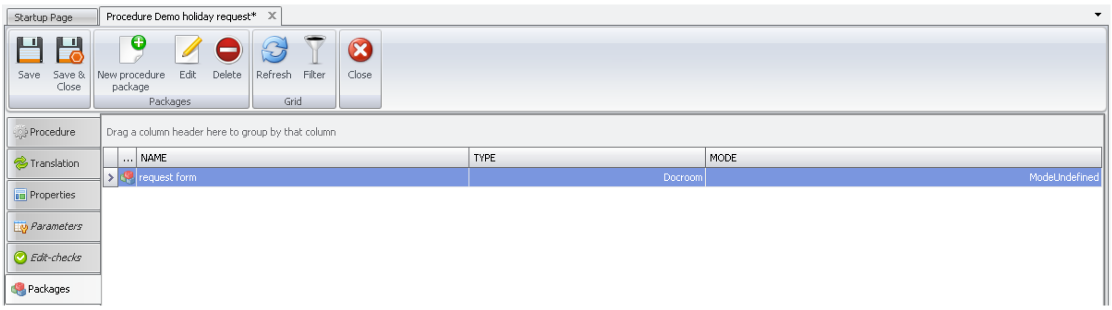
Please see the Doma 6 – Application administrator manual - Edit-checks to know more about the use and configuration of edit-checks.

3.7 Tab Packages

This tab shows all packages linked to the procedure.

Packages are placeholders for:

- DocRoom documents
- Routing cases
- Sharepoint documents
- Docroom queries
- CaseQueries



From here you can:

- Add a package to the procedure.
- Edit one of the packages in the list.
- Remove a package from the procedure.

Remark:

Please see the manual *Doma 6 - Application Administrator Manual - 05 - Packages* for more information about packages.

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3.8 Tab Steps

Overview of the steps of the procedure.

From here you can:

- Edit one of the steps.
- Change the name of a step.
- Delete one of the steps.

3.9 Tab Screens

Overview of the screens linked to the procedure.

From here you can:
- Add a new screen.
- Edit one of the screens.
- Delete a screen.
- Set security on a screen.

3.10 Tab Event Actions

Overview of all event actions for this procedure.

An event action is a pre-configured action that will be executed on a pre-defined event.
Both event and action are configured in this tab.

From here you can:
- Add an event action.
- Edit an event action.
- Delete an event action.

3.11 Tab User Events

Here you can create a user event for the procedure. When defining a user event, you create a toolbar button or a context menu item. After the creation of the button and/or context menu item, you will define one or more actions that will be linked to this button and/or context menu.

Remark:

To be able to use the event action button in the toolbar, it has to be defined as a screen action in the screen detail.

3.12 Tab Event Handlers

Event handlers are pre-defined code which can be linked to a certain procedure.
The code is programmed in dotnet and will be provided as a dll.
In this tab, you can link an event handler to this procedure.

3.13 Tab View

View on the procedure.
Here you can:

- Create the flow: create steps and connect them.
- Define the step details and its security

3.14 Tab Notes

Overview of administrator/developer notes about the procedure for other administrators or developers.
Here you can:

- add notes.
- edit notes created by your user.
- delete notes created by your user.

3.15 Tab Audit

Overview of all administrator actions done on the procedure.

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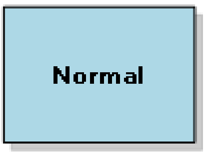
4 Procedure step types

- Doma has different *step types* in order to be able to create procedures for different purposes.
- Steps are defined in the tab ***View*** of the procedure configuration window in the Doma admin module.
- On creation of a step, you must define which step type you will use.

4.1 Steps with user interaction

4.1.1 Normal



- The NORMAL step is a step that requires human interaction: this step will be shown in the work list of one or more users in the Routing WebInterface.
- Here you can define the properties and packages that will be shown to the user. The properties and packages, which can be put in read only, editable, mandatory or can be hidden.
- Several arrows can depart from a normal step; this makes parallel routing possible.
- Event actions can be defined on this step type.

4.1.2 NormalAll

- The NORMALALL step is a step that requires human interaction: this step will be shown in the work list of one or more users in the Routing WebInterface.
- This step has to be released by all users to whom the step has been assigned.

  E.g. when it has been assigned to 3 users, it is first available in the work list of these 3 users. When one user opens it and releases it, it remains in the work list of the other two users. One of the two opens the step and releases. Now it still remains in the work list of the third user. After this user has released the step, it will continu to the next step.

- Here you can define the properties and packages that will be shown to the user. The properties and packages, which can be put in read only, editable, mandatory or can be hidden.
- Several arrows can depart from a normal step; this makes parallel routing possible.
- Event actions can be defined on this step type.

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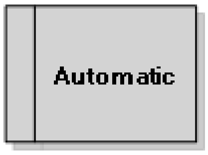
4.2 Automatic steps

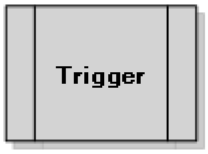
4.2.1 Automatic



- The AUTOMATIC step is a step that is not visible in any work list, since it is automatically executed in the background.
- This step is used to execute event actions at pre-defined events:
  - **onEntry**: when the workflow enters the step.
  - **onKeep**: when the workflow is saved.
  - **onStep_Expiry**: when the deadline of the step has been reached.
  - **onExit**: when the step is released.

Please see manual Doma 6 – Application administrator manual – Events and actions for more information about event actions.

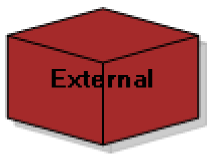
4.2.2 Trigger



- The TRIGGER step is an automatic step that is not visible in any work list, since it is automatically executed in the background.
- It is different from the automatic step since here you can link an event action that is triggered every time the batch job checktrigger runs.
- This step is used to execute event actions at pre-defined events:
  - **onEntry**: when the workflow enters the step.
  - **onKeep**: when the workflow is saved.
  - **onStep_Expiry**: every time the batch job ***checktriggers*** runs.
  - **onExit**: when the step is released.

Please see manual Doma 6 – Application administrator manual – Events and actions for more information about event actions.

4.2.3 External



- The EXTERNAL step is a step that is not visible in any work list, since it is automatically executed in the background.
- It is used as a plug-in for external modules by using custom code that can be invoked by an event action. The workflow remains in this step until it is released by the external application.

Please see manual Doma 6 – Application administrator manual – Events and actions for more information about event actions.

Omega Business Park
Wayenborgstraat 24 – B-2800 Mechelen
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info@arco.be
t +32 (0)15 289 030
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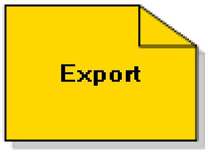
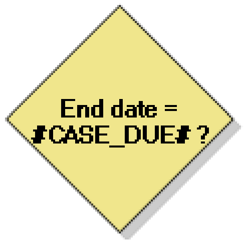
4.2.4 Export



- The EXPORT step is only available for backwards compatibility. In previous version (before version 6), this step allowed to export workflow data to an XML file.

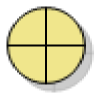
4.3 Steps for conditional routing

4.3.1 Condition



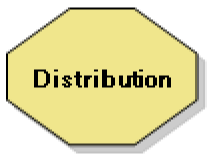
- The CONDITION step is a step that makes conditional routing possible.
- In the step, you can define one or more conditions, based upon the values of the properties of the procedure.
- Two arrows leave the step, on them a Boolean option (Yes/No):
  - if the condition has been reached, the route of the arrow with **Yes** will be followed.
  - if the condition has not been reached, the route of the arrow with **No** will be followed.
- It is not possible to put 2 steps of the type Condition after each other.

4.3.2 EndCondition



- The ENDCONDITION step is a step where the 2 arrows of the condition reunite.
- This step is not necessarily used when using a conditional step.
- Event actions can be defined on this step type.

4.3.3 Distribution



- The DISTRIBUTION step is a step that makes conditional routing possible. In contrary to the conditional step type, the workflow can go to more than 2 different directions.
- The conditions are set on the arrows that leave the step, not in the step detail itself.
- Conditions are based upon the value of one or more properties of the procedure.
- Next to the conditions, there is a default routing option: if no condition has been reached, the workflow will follow this route.

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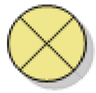
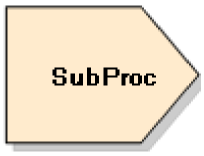
4.3.4 EndDistribution



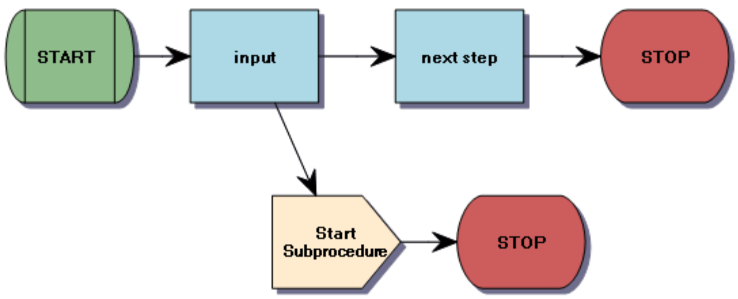
- The ENDDISTRIBUTION step is a step where the different routes of the distribution reunite.
- This step is not necessary, since the routes of a distribution do not always reunite in the flow.
- This step can function as a wait step: when configured like this, it will wait until all distributions have been processed and arrived in this EndDistribution step. Only then it will continue to the next step.

4.4 Steps related to subprocedures

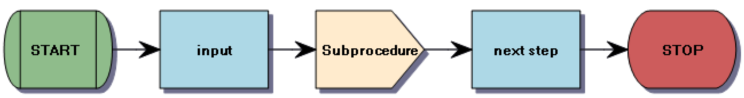
4.4.1 SubProc



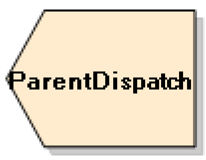
- The SUBPROC step is a step that starts a sub procedure.
- The sub procedure is selected from the list of existing procedures.
- Property values and the content of packages can be transferred from the main procedure to the sub procedure and vice versa.
- The subprocedure step can be dispatched immediately, so that:
    - the subprocedure start is triggered and the main procedure continues:



    - or it is only dispatched when the complete sub procedure has finished:



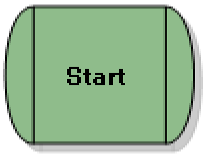
4.4.2 ParentDispatch



- The PARENTDISPATCH step is a step that is used in a subprocedure. It gives a signal to the main procedure to dispatch the sub procedure step.

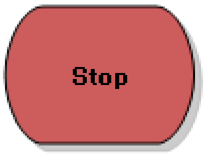
4.5 Other

4.5.1 Start



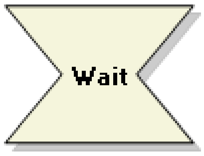
- The START step indicates the beginning of the procedure.
- It is not a real step: it cannot be configured and thus cannot have properties or packages.

4.5.2 Stop



- The STOP step indicates the end of the procedure.
- It is possible to visualize more than one STOP step in one procedure. This will give a clearer overview to the users.
- It is not a real step: it cannot be configured and thus cannot have properties or packages.

4.5.3 Wait



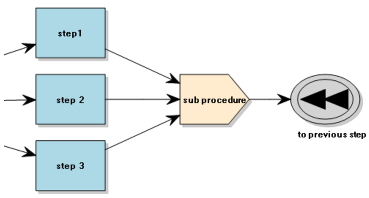
- The WAIT step is a step where parallel routes join again.
- The procedure will wait until all previous parallel routes have been processed. This way we can guarantee that all information coming from the different parallels is available before we continue the procedure.

4.5.4 Cancel

- The CANCEL step cancels the procedure.
- If the procedure is used for the creation of an object, also the object creation is cancelled.

4.5.5 PreviousStep

- The PREVIOUS step will return to the step from where the workflow was released.



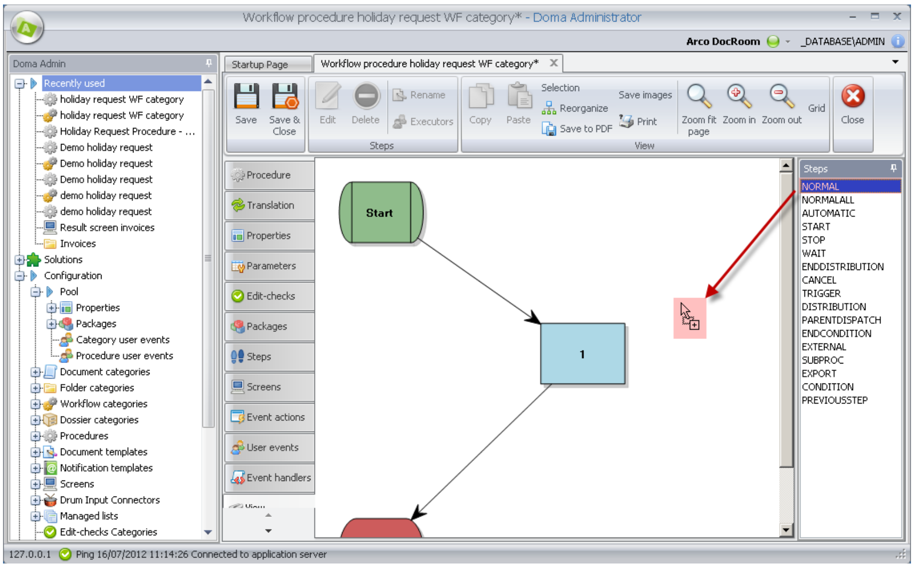
E.g. Three steps precede the sub procedure step. After running through the subproc step, we want to return to the previous step. This can be done with this step type.

5 Actions on procedure and steps during configuration

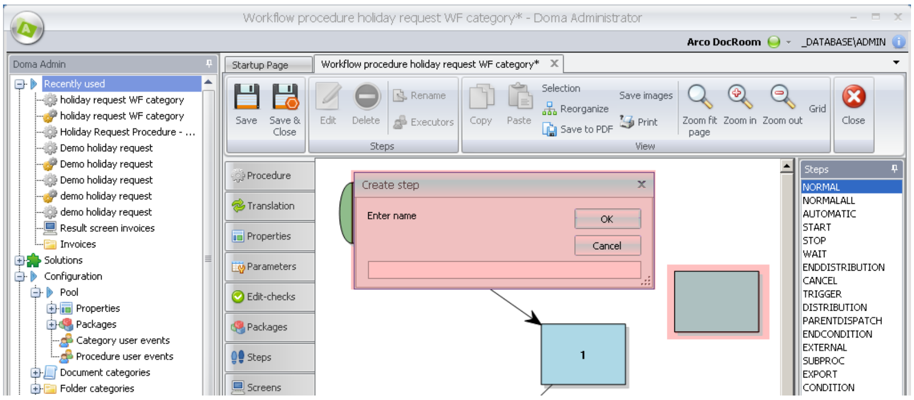
5.1 Create a new step

Steps are created in the View tab of the procedure configuration tab.
To create a step:

- Select the step type in the step type overview at the right side of the page and drag it to the overview.



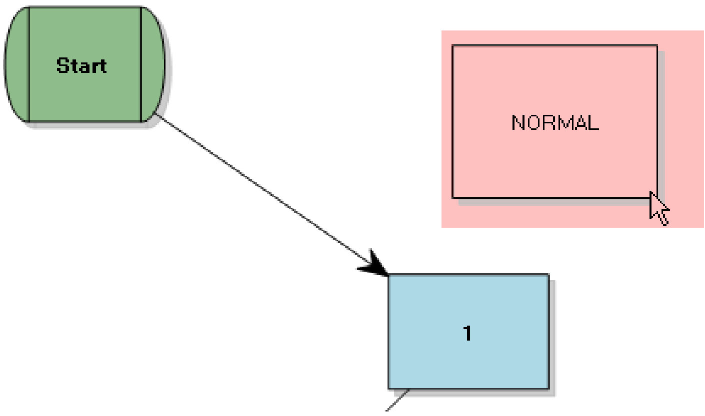
- Once the mouse button has been released, the step appears. Next to it a pop-up window Create step appears where you have to enter the step name. Enter the step name and click on the **OK** button in the window.



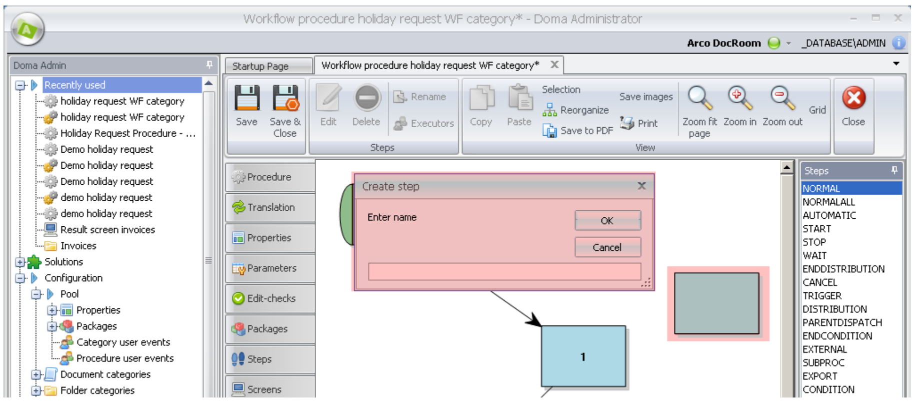
The step then appears with its name in the overview:

OR

- Select the step type in the step type overview at the right side of the page
- Put the cursor somewhere in the screen.
- Press the left mouse button and move the cursor. A rectangle with the step type appears.



- Release the left mouse button.
- Once the mouse button has been released, the step appears. Next to it a pop-up window Create step appears where you have to enter the step name. Enter the step name and click on the **OK** button in the window.



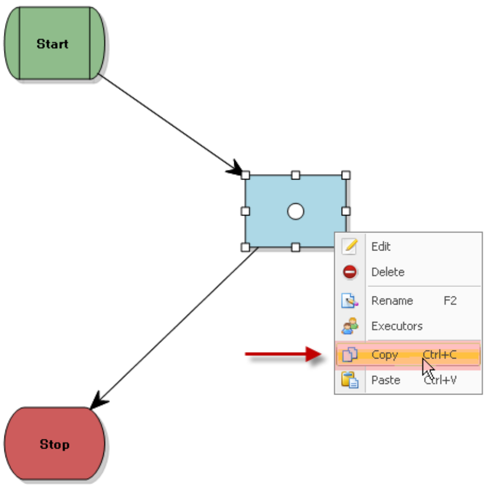
The step then appears with its name in the overview:

5.2 Copy and paste an existing step

Sometimes the step you want to create is almost the same as another step in the procedure. Instead of configuring the step once again, you can copy the step that already exists and past it on the right location and edit it.

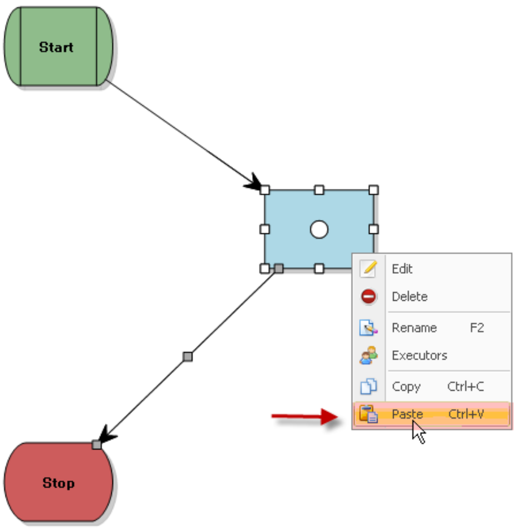
To copy a stap:

- Select the step you want to copy.
- Click on the right mouse button.
- A menu appears: select the option **Copy**.
- The step has now been copied.

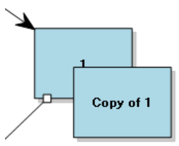


To paste a step:

- Select a step so that the focus is on the step.
- Click on the right mouse button.



- A menu appears: select the option **Paste**.
- The step has now been copied.



5.3 Edit a step

To edit a step:

- Open the tab **View** in the configuration tab of the procedure.
- Double click on the icon of the step you want to edit.
- The step configuration window will appear in a new tab.

OR

- Open the tab **Steps** in the configuration tab of the procedure.
- Double click on the name of the step you want to edit.
- The step configuration window will appear in a new tab.

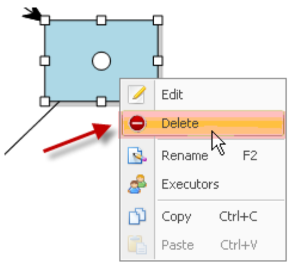
5.4 Delete a step

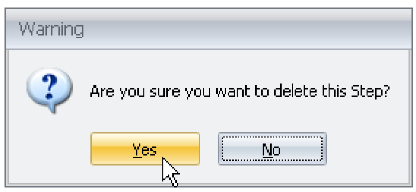
To delete a step:

- Open the tab **View** in the configuration tab of the procedure.
- Select the step you want to delete.
- Click on the right mouse button.
- A menu appears: select the option **Delete**.
- A warning message appears: Are you sure you want to delete this step?
- Click on **OK** to proceed.
- The step has now been deleted.

OR

- Open the tab **View** in the configuration tab of the procedure.
- Select the step you want to delete.
- Press the **Delete key** on your keyboard.
- A warning message appears: Are you sure you want to delete this step?
- Click on **OK** to proceed.
- The step has now been deleted.





Remark:

Only steps in which no work is present can be deleted.

5.5 Move a step

You can re-order the look of your procedure by moving steps.

Select the step and drag & drop it on its new location. If arrows are attached, they will follow the step.

5.6 Move several steps with one movement

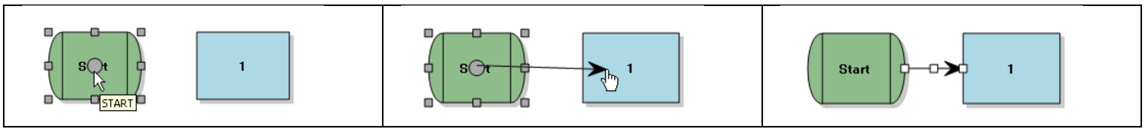
In order to re-arrange a number of steps at once, select the steps by clicking on the steps and holding down the <CTRL> key on the keyboard. Then drag & drop the selection to its new location.

5.7 Link steps – draw a arrow from one step to another

Steps have to be linked by arrows. These arrows indicate the flow: it goes from one step to another, following the direction of the arrow.

To link two steps:

- Select the step from where you want to start.
- A number of grey squares appear around and a grey dot appears in the middle of the step.
- Put the cursor on the dot in the middle of the step and click on the right mouse button.
- Hold the left mouse button and drag the arrows to the step you want to link.
- Release the left mouse button once you have reached the step.
- The steps are now linked.



5.8 Remove an arrow between steps

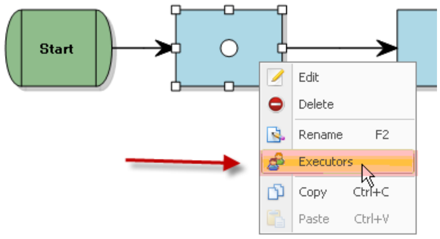
To remove an arrow between two steps:

- Select the arrow you want to delete.
- Press the **Delete key** on your keyboard.
- The arrow is immediately deleted.

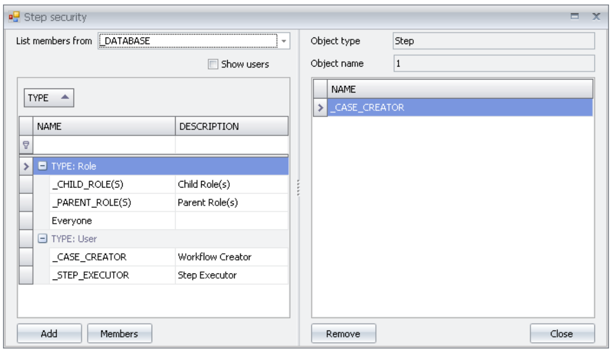
5.9 Assign a step to a user

Steps can be assigned to users, roles or groups from the procedure overview in the tab View of the configuration tab of the procedure:

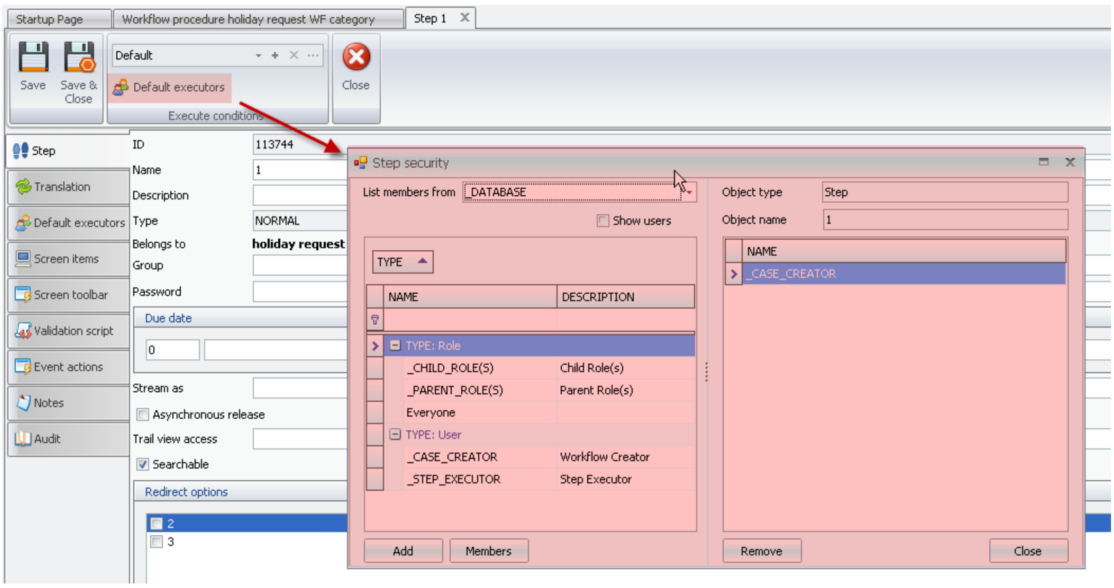
- Select the step.
- Click on the right mouse button.
- A menu appears: select the option **Executors**.



- The step security window appears: select the step executors here.



It is also possible to assign steps from the step detail tab: select the option Default executors in the ribbon to show step security window:



5.10 Add properties to a step

On procedure level, we can define properties. These properties are fields which can be visualised in the steps of the procedure.
In these fields, user can enter data about the workflow.

*Please refer to the **Doma 6 – Application administrator manual – 04 Properties and Edit Checks** to know more about properties.*

5.11 Add packages to a step

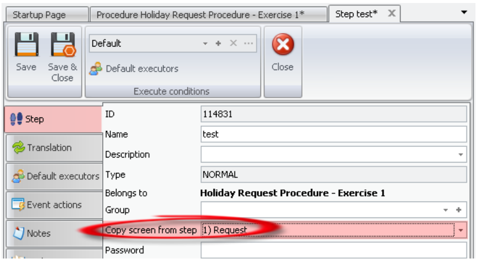
Next to properties, you can also define packages for a procedure.
Packages are placeholders for documents, files or workflows.

*Please refer to the **Doma 6 – Application administrator manual – 05 Packages** to know more about packages.*

5.12 Configure step lay-out

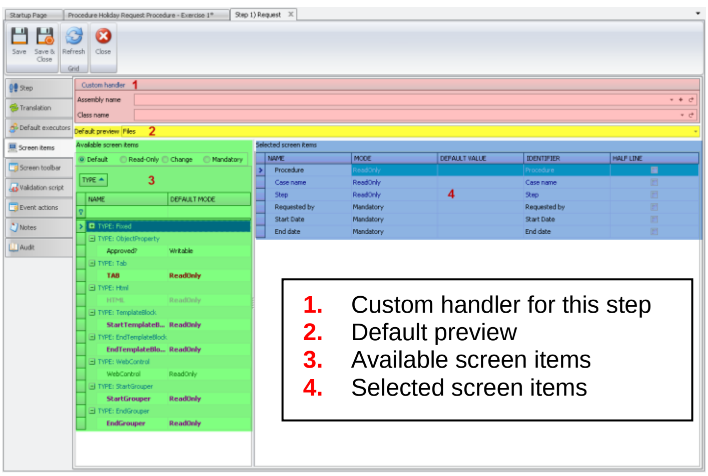
To visualize the configuration tabs for the step lay-out, you must open the step detail, make the first configurations and save. After the step has been saved, the tabs **Screen items** and **Screen toolbar** appear.

When you want to copy the lay-out of an existing step, you can do this by selecting the step that has to be copied in field ***Copy screen from step*** in the tab **Step**. *This option is only available until the step configuration is saved for the first time.*



5.12.1 Tab Screen items

In this tab can be defined which properties will be shown in the step detail.



5.12.1.1 Custom handler

Here you can link a custom handler to the result screen. This way, you can add code that will do actions which are not provided in the default Doma application.

5.12.1.2 Default preview

Value	Description
Nothing	Nothing is automatically opened in the preview pane at the right of the screen.
Files	The main file is automatically opened in the preview pane at the right of the screen.

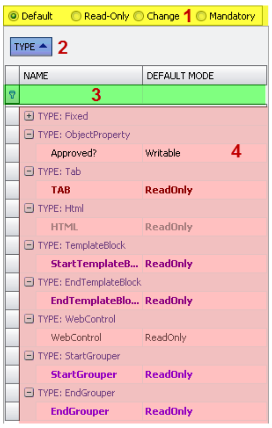
5.12.1.3 Available screen items

List of all items that are available for this screen.

5.12.1.3.1 Active mode

The items you drag and drop to the selected screens item will automatically gain the mode that is selected here:

Value	Description
Default	The system will copy the default mode mentioned next to the name of the available screen item.
Read-Only	The system will put the property in read-only on the screen.
Change	The system will put the property in edit mode on the screen.
Mandatory	The system will put the property as a mandatary property on the screen: users must complete the field before they can release to go to the next step.



5.12.1.3.2 Column grouper

When you drag a column header to this place, the list will automatically be grouped on the items of this column.

5.12.1.3.3 Filter

Field in which you can enter a (part) of a word to limit the view of the list.

1. Active mode
2. Column grouper
3. Filter
4. List of available fields

5.12.1.3.4 List of available fields

<u>**TYPE: Fixed**</u>

Values	Description
Case description	Description of the case.
Procedure description	Description of the procedure.
Step description	Description of the step. (Often used to give an instruction to the user.)
Step DueDate	Deadline of the step.

Step StartDate	Date and time when the step was started.
Last Step Executor	User who released the previous step.
Priority	Priority level of the workflow.
Created by	Starter of the workflow.
Creation date	Date when the workflow was started.
Due Date	Deadline on workflow level.
Edit Checks	
Tab Closer	Closes the tab when a tabTYPE is used. All items put after the tab closer will be visualized under the tab.
TargetObject.DetailScreen	Reference to the default detail screen.
TargetObject.EditScreen	Reference to the default edit screen.
TargetObject.Folder Text	Reference to the default folder text screen.

TYPE: ObjectProperty

All properties created on object level are mentioned in this list. Select a property and drag it to the selected screens item to visualize it in the screen.

TYPE: Tab

Indicates the beginning of a tab. All items mentioned in the list above the tab, will appear above the tab in the WebInterface. All items mentioned after the tab will appear in the tab. A tab is closed by Tab Closer. All items in the list mentioned after the tab closer appear under the tabs.

TYPE: Html

Html fields are used to enter html code. The code written in a n html field item will be interpreted by the html parser and will be visualized as defined in the html code.
Html fields are often used for more extensive lay-out of the step.

TYPE: TemplateBlock

TYPE: EndTemplateBlock

TYPE: WebControl

Webcontrols are used to enter asp code. The code written in a webcontrol item will be interpreted by the asp parser and will be visualized as defined in the asp code.

TYPE: StartGrouper

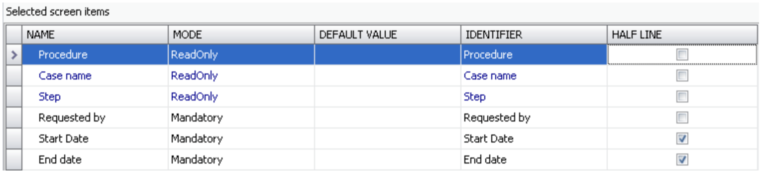
A grouper will bundle the properties mentioned between the items StartGrouper and EndGrouper.

TYPE: EndGrouper

A grouper will bundle the properties mentioned between the items StartGrouper and EndGrouper.

5.12.1.4 Selected screen items

Overview of all items that will appear on the screen.

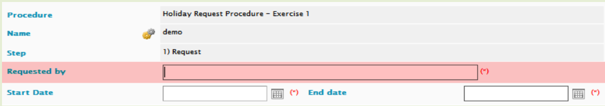


Selected screen items

NAME	MODE	DEFAULT VALUE	IDENTIFIER	HALF LINE
Procedure	ReadOnly		Procedure	☐
Case name	ReadOnly		Case name	☐
Step	ReadOnly		Step	☐
Requested by	Mandatory		Requested by	☐
Start Date	Mandatory		Start Date	☑
End date	Mandatory		End date	☑

<table>
<tr><th>Column</th><th>Description</th></tr>
<tr><td>Name</td><td>Name of the item.</td></tr>
<tr><td>Mode</td><td>Mode in which the item will appear in the WebInterface:</td></tr>
<tr><td>Default Value</td><td>Default value that appears in the screen. Can be plain text or a Doma constant.</td></tr>
<tr><td>Identifier</td><td></td></tr>
<tr><td>Half Line</td><td>☑ When this option has been selected for 2 consecutive fields, the fields will be placed next to each other on one line in the web interface.

☐ Field is positioned on one line in the web interface.



</td></tr>
</table>

5.12.2 Tab Screen toolbar

Here you can define which toolbar items will be available.

Drag & drop the items from the list ***Available screen toolbar items*** to the list ***Selected screen toolbar items***.

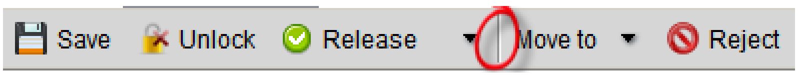
Overview of all available items

TYPE: Fixed

Name	Description	Toolbar Icon
Save and keep open*	Save button. The workflow remains locked and the detail screen is still visible. Can be used to trigger an action.	Save
Unlock *	Button to close the detail screen in the WebInterface and unlock the workflow, so other users can open the detail.	Unlock
Release*	Button to go to the next step of the procedure.	Release
Release to*	Button to release the workflow to another step than the next. The steps where users can release to are defined in the redirect options. *Only shown when a redirect option is defined in the step configuration.*	Release
Move case*	Button to move the workflow to another step. All normal steps will be shown in the list.	Move to
Reject*	Button to resend the workflow to the previous step.	Reject
Suspend*	Button to suspend the workflow until a pre-defined date. Suspended workflows can be hidden in the worklist.	Suspend
Transfer work	Button to transfer work from one user to another.	Assign to
History	Button to show the history of the workflow.	
Procedure image	Button to show the complete procedure structure.	
Clear form	Button to clear all properties of the step.	
Edit deadlines	Button to edit the deadlines on workflow or step level.	
Finish case	Button to end the workflow immediately.	Finish Workflow

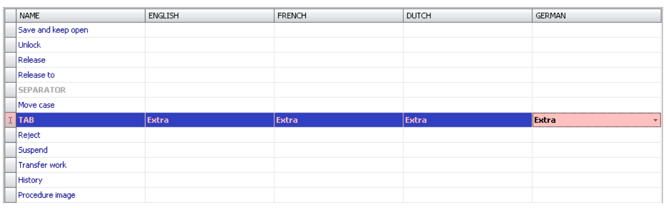
(*) These items are shown in the default configuration of the screen.

TYPE:Separator



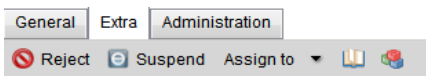
TYPE: Tab

Creates an extra tab in the toolbar.



NAME	ENGLISH	FRENCH	DUTCH	GERMAN
Save and keep open				
Unlock				
Release				
Release to				
SEPARATOR				
Move case				
TAB	Extra	Extra	Extra	Extra
Reject				
Suspend				
Transfer work				
History				
Procedure image				

The items that appear under the tab in the configuration window will be the items that appear in the tab:



Make sure you enter a name in the columns English, French, Dutch and German. If no value is found in the language of the user, the tab will not be shown.

TYPE: StartGrouper

TYPE: EndGrouper

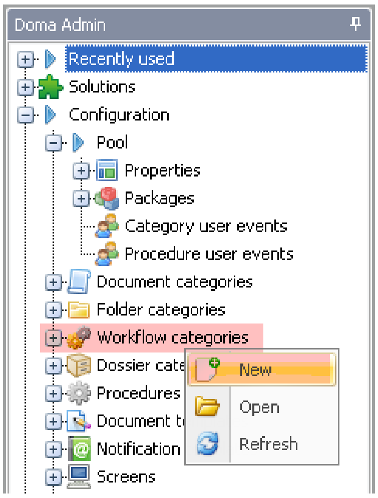
Omega Business Park www.arco.be t +32 (0)15 289 030
Wayenborgstraat 24 – B-2800 Mechelen info@arco.be f +32 (0)15 289 031

6 Doma admin: WorkFlow Categories – overview of the workflow category configuration screens in the Doma admin module

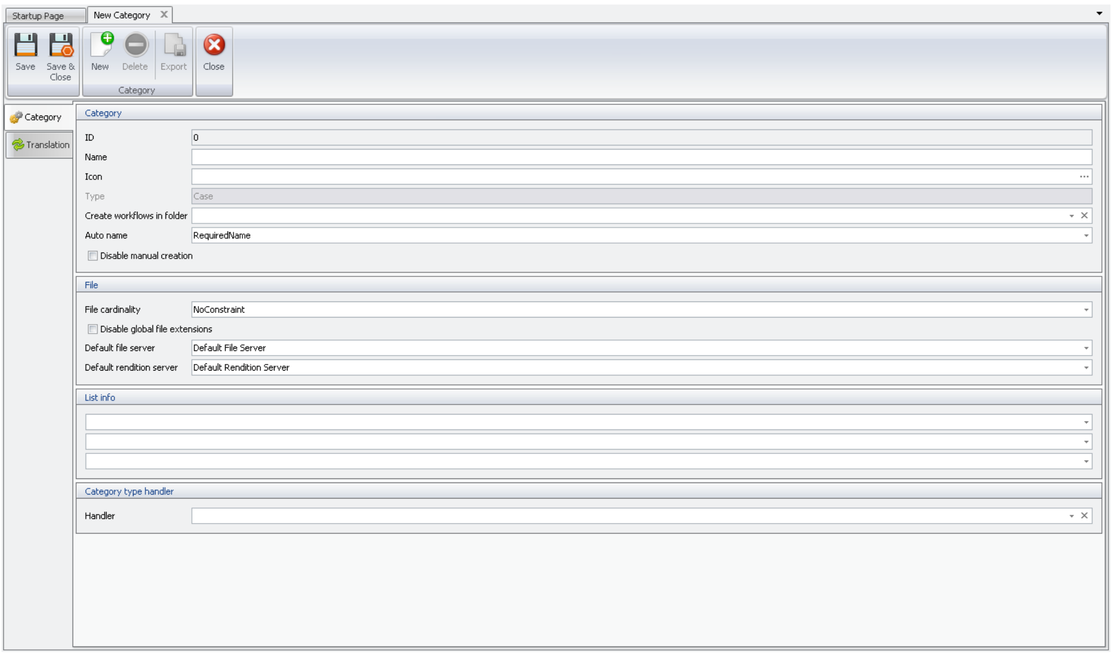
All Doma configuration is done in the Doma admin module. This client application is by default installed on the server. This tool can also be installed on local PC's.

6.1 Open configuration screen

Once the Doma admin module is started, select the item ***Workflow categories*** in the Doma admin navigation tree and click on the right mouse button. A menu appears. Select the option ***New***.



A new tab with the name ***New Category*** appears in the window at the right:



When configuring a Workflow category, you configure:

1) The Workflow category – the object available in DocRoom
2) The insert procedure of the workflow category – the actions done in Routing.

On creation, the category configuration tabs appear. When positioned in the tab Category of the workflow category configuration screen, you can navigate to the insert procedure configuration tab by clicking on the icon *Procedure* in the ribbon above the tabs.
The *Procedure* icon only appears after save of the Workflow category.

Enter a category name and click on the ***Save*** button in the ribbon above.
A number of extra tabs appear in the configuration tab of the Workflow category. The tab name has changed from new category to the actual name of the category.

6.2 Workflow category configuration

6.2.1 Icon toolbar

Icon	Description
Save	Saves your changes.
Save & Close	Saves your changes and closes the tab.
New	Opens a new tab
Delete	Deletes the category.
Export	Exports the category to a file.
Procedure	Opens the configuration tab of the insert procedure of the workflow category in a new tab.
Close	Closes the configuration tab of the workflow category.

6.2.2 Tab Category

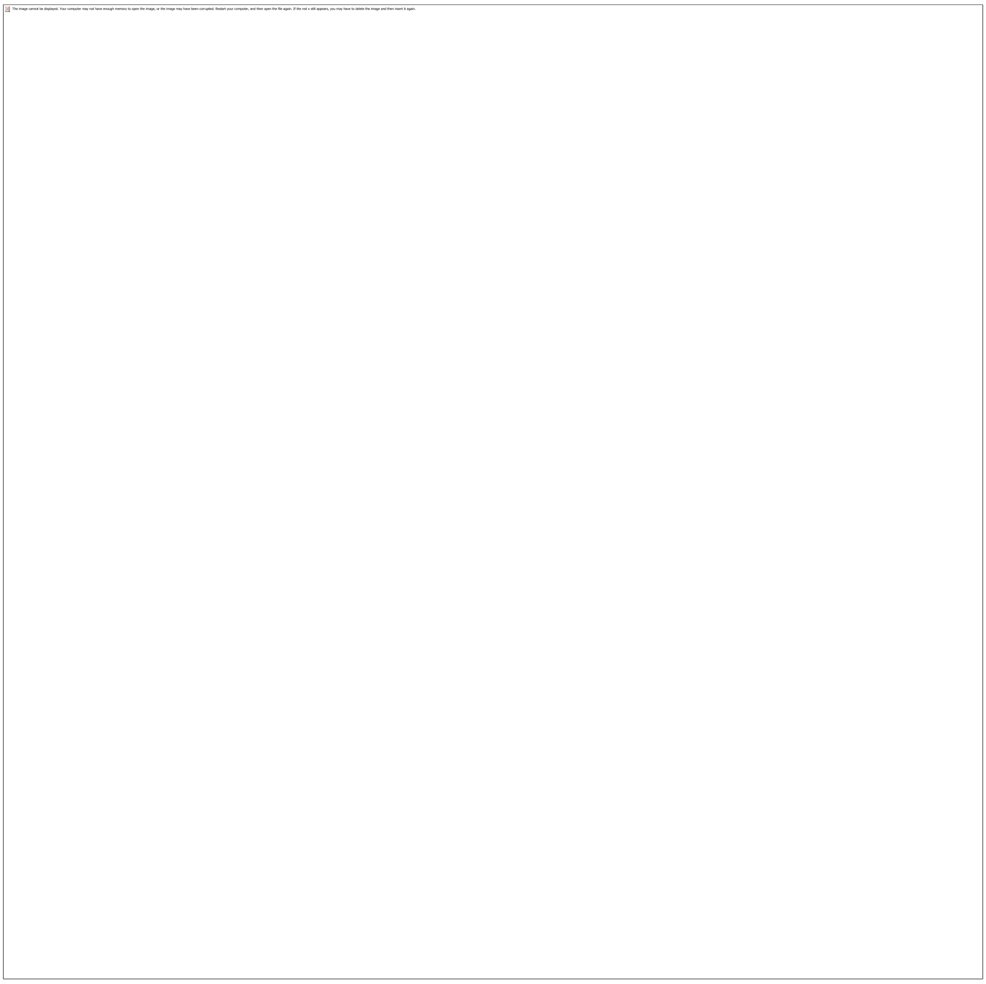
Here you can configure the workflow category and its insert procedure and set the security on procedure level. To configure the insert procedure of the workflow category: click on the icon *Procedure* in the ribbon above the tabs.

Field Name	Description
	Category
ID	Read-only field. Shows the ID of the workflow category. This is created by the application.
Name	Name of the workflow category.
Icon	Here you can select a specific icon that will be shown in the DocRoom webinterface for workflows of this category. Click on the button ... to open a browse screen to select the icon.
Type	Mentions in read only the category type: *Case*.
Create workflows in folder	Folder where a workflow of this workflow category will be put by default.

Auto Name	**RequiredName**	On creation, the user must add a name for the workflow category. (Default value)
	Empty Name	On creation, the name of the workflow category is left empty.
	GUIDName	On creation, a GUID (Globally Unique Identifier, i.e. a unique name) is created by the application for the new workflow category.
	OptionalName	On creation, the user can but must not add a name for the workflow category.
Input package	Used to link documents in a generic way on creation of a new workflow. (Select a number of documents in a list and click on new case in the toolbar. If an input package is defined, the selected documents are uploaded to the input package of the newly created workflow.)	
Disable manual creation	☑ When selected, manual creation via the web interface is disabled, so users cannot create an item of this workflow category in the web interface. ☐ If not selected, manual creation of a workflow category item is possible in the web interface.	
	File	
File cardinality	**NoConstraint**	It is possible to attach files to the workflow. There is no limitation. (Default value)
	Not Allowed	It is not possible to attach a file to the workflow.
	ExactOne	Exact one file can be attached to the workflow.
	AtLeastOne	At least one file has to be attached to the workflow.
	MaxOne	Maximum one file can be attached to the workflow.
Disable global file extensions	☑ When selected, the global file extensions, as defined in Doma admin/settings/File extensions, are not used to check whether the system is allowed to upload a file of that extension. ☐ If not selected, the system will verify in the global file extensions list whether the extension of the file that is to be uploaded is mentioned. If the extension is mentioned in the list, it will be uploaded. If not, it will not be uploaded.	
Default file server	File server where the documents are put by default. Used when no other file server is mentioned.	
Default rendition server	Default rendition server. Used when no other rendition server is mentioned.	
	List info	
	These 3 fields allow you to list the value of any property (properties) of the procedure in the screens My Work, My Dossiers and Open Dossiers. You can type any text in the fields. To visualize a value of a property, use the next syntax: [@nameoftheproperty@]. The value will be visualized in the web interface.	
	Category type handler	
Handler	Handler that is linked to this workflow category. The code of this handler will be executed on the event mentioned in the code.	

6.2.3 Tab Translation

If the DocRoom or Routing interface is presented in different languages, the procedure name, description and tooltips can be translated in the languages that are used.
When the web user selects another language, the label will then appear in the selected language (if the language labels are completed).



Enter the translations of the workflow category name and description in the language fields under the headers *Name* and *Description*.
Enter the translations of the tooltips in the language fields under the header *Tooltip*.

6.2.4 Tab Properties

This tab shows all properties linked to the worklfow category.

From here you can:

- Add a new category property to the workflow category.

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- Add a new pool property to the workflow category.
- Edit one of the linked properties.
- Convert a property from one type to another. (e.g. convert a pool property into a workflow category property.)
- Remove a property from the workflow category.

6.2.5 Tab Parameters

Here you can define a list of parameters that otherwise would have to be created on database level.
The advantage of the parameters in this list is that also application administrators can administer the parameter list.
Scripting allows us to use these parameters in the workflow category or in its insert procedure.

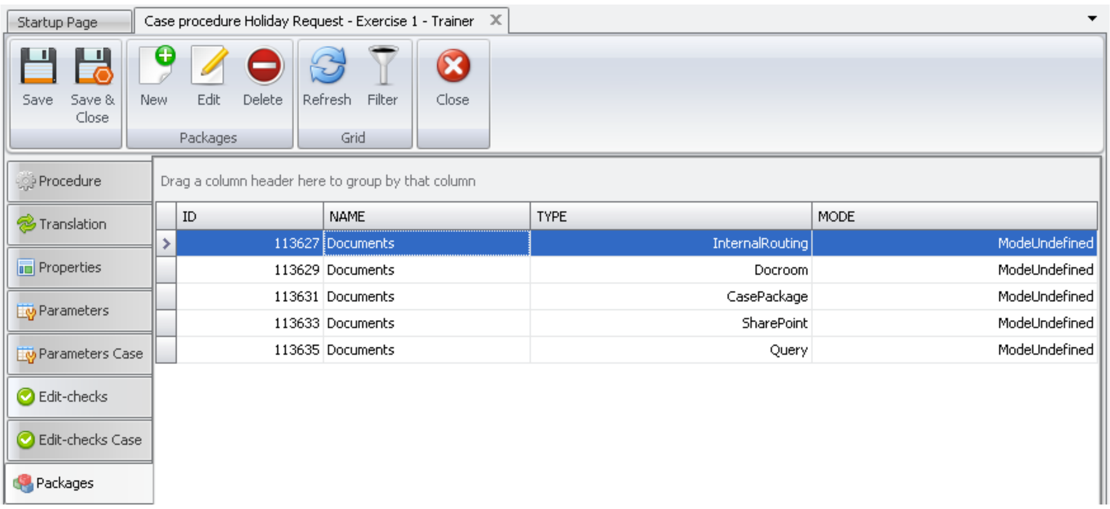
6.2.6 Edit-checks

In this tab, you can define edit-checks.
Edit-checks can be defined on both category and procedure level. It is an easy way to configure validation checks on the data that has been filled in by the user.

Please see the Doma 6 – Application administrator manual - Edit-checks to know more about the use and configuration of edit-checks.

6.2.7 Packages

Overview of all packages of this workflow category.
From this tab you can add/edit/delete packages of the workflow category.



6.2.8 Document templates

Overview of all document templates linked to this category.
Document templates are templates containing bookmarks in which data of the workflow case or of the procedure can be copied, thus creating a file containing specific information which is put in a default lay-out.

Please see the Doma 6 – Application administrator manual – Document templates to know more about the use and configuration of document templates.

6.2.9 Screens

Overview of the screens linked to the steps of the workflow category.

From here you can:

- Add a new screen.
- Edit one of the screens.
- Delete a screen.
- Set security on a screen.

6.2.10 Event actions

Here you can create an event action for this worklfow category. An event action is a pre-configured action that will be executed on a pre-defined event.
Both event and action are configured in this tab.

6.2.11 User events

Overview of the user events for this workflow category.

Here you can:

- create a user event for the workflow category.
  When defining a user event, you create a toolbar button or a context menu item. After the creation of the button and/or context menu item, you will define an action that will be linked to

this button and/or context menu. To be able to use the button, it has to be defined as a screen action in the screen detail.

- Edit a user event
- Delete a user event.

6.2.12 Event handlers

Event handlers are pre-defined code which can be linked to a certain category.
The code is programmed in dotnet and will be provided as a dll.
In this tab, you can link an event handler to this case category.

Remark*: Event handlers replace the Routing scripts.*

6.2.13 Notes

Overview of administrator/developer notes about the workflow category for other administrators or developers.

Here you can:

- add notes.
- edit notes created by your user.
- delete notes created by your user.

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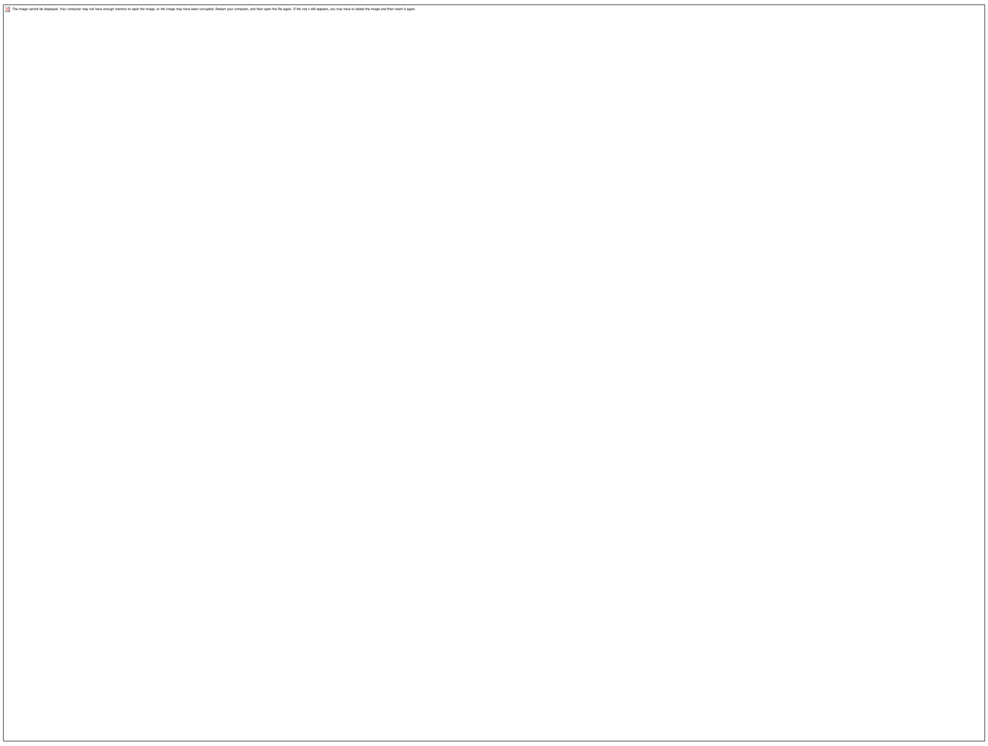
6.2.14 Audit

Overview of all actions on the category.



6.3 Insert procedure configuration

Click on the icon ***Procedure***  in the ribbon of the Category tab of the Workflow category configuration tab. It will open in another configuration tab in the Doma admin module.

The configuration of an insert procedure of a Workflow category is the same as the configuration of a ‘normal’ procedure.

Please see chapter Doma admin: ***Procedures – overview of the procedure configuration screens in the Doma admin module*** to see how it is configured.

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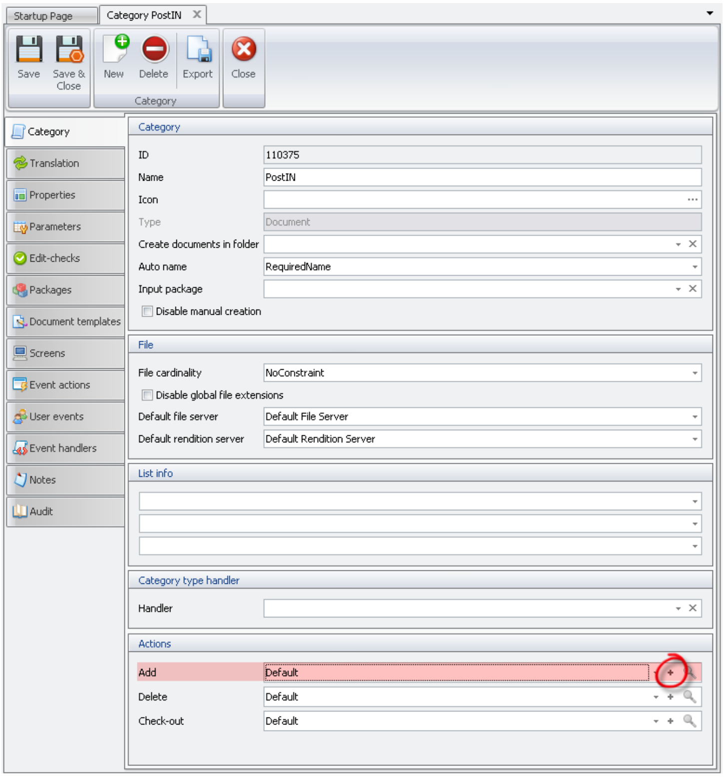
7 Doma admin: Document with an insert procedure – overview of the configuration screens in the Doma admin module

Procedures can be used to insert, check-out or delete a document or a folder.
When a procedure is used to insert a document, the procedure will be started when a new document is added. The document is already added to DocRoom, but it will remain in creation until the procedure is ended.

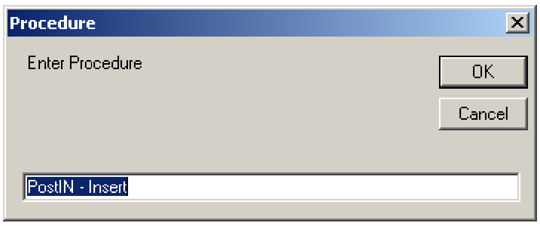
7.1 How to create a new procedure as an insert procedure for a category

To create an insert procedure for a category:

1. Open the Doma WebInterface.
2. Open the category configuration tab.
3. Click on the **Add button** next to the field ***Add*** of the section ***Actions***.

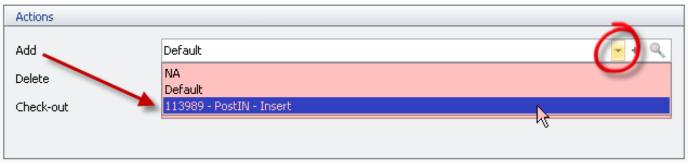


4. A pop-up window appears and suggests a name for the procedure (*Name of the object* – Insert). Change the name if you want to give another name to the insert procedure.



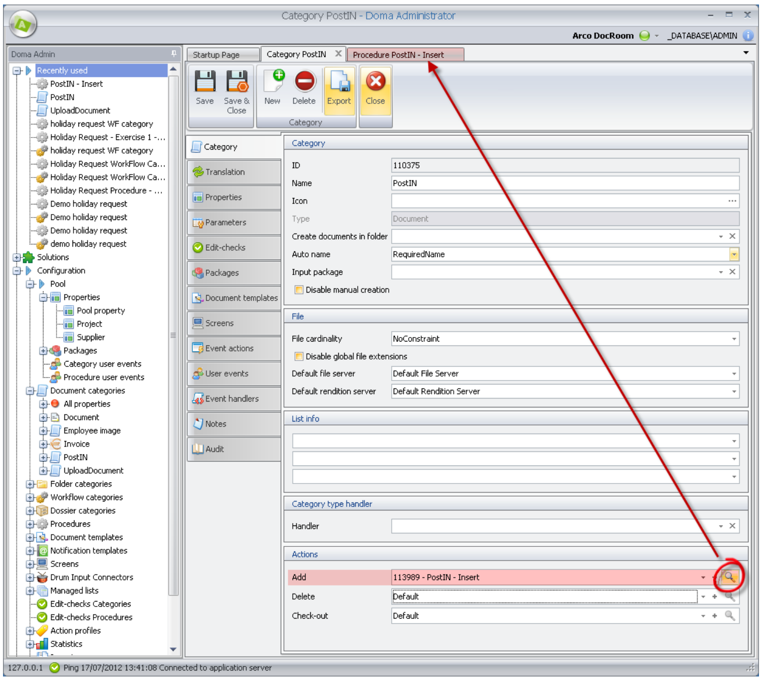
Click on the **OK** button to create the insert procedure.

5. Now we still have to define the newly created procedure as the insert procedure of our object. Therefore, open the list of the field ***Add*** of the section ***Actions*** and select the procedure:

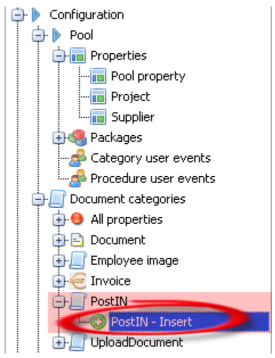


6. Click on the **Save** button in the ribbon above the category tab to save the configuration.

7. To view and configure the procedure: click on the **View** button next to the field ***Add*** of the section ***Actions***. The procedure detail will open in a new configuration tab.



It is also possible to open the procedure detail from the navigation tree in Doma admin: the insert procedure is presented as a sub-item of the category where it is linked to:



Remark:

The configuration of a procedure is explained in chapters *Doma admin: Procedures – overview of the procedure configuration screens in the Doma admin module* and *Step by step example of a simple procedure configuration*.

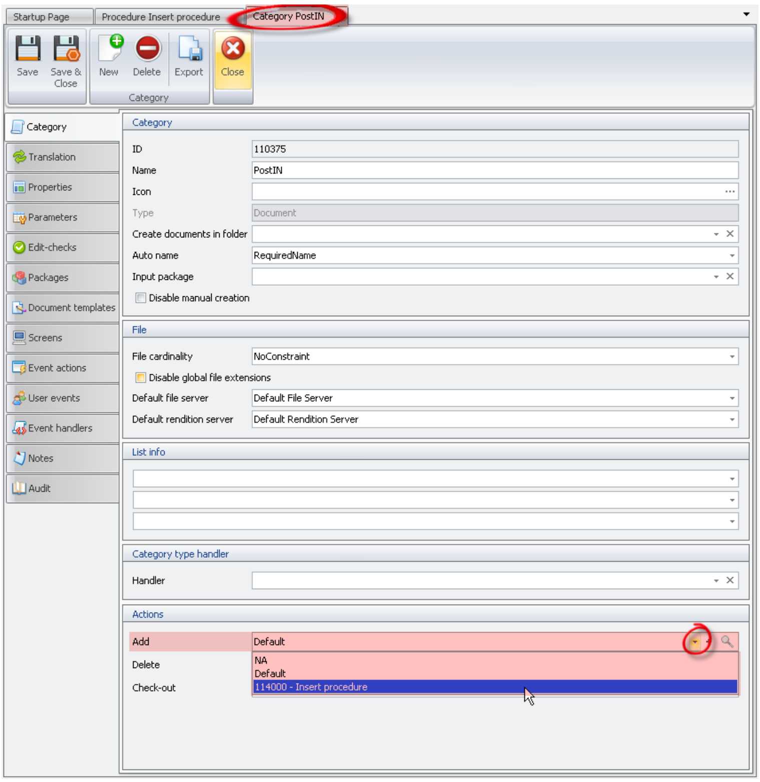
7.2 How to link a procedure as an insert procedure to an existing category

If you have a procedure that already exists and that can be used as an insert procedure for your category, you can link it to the category instead of creating a totally new one.

To link a procedure as an insert procedure for an existing category:

1. Open the Doma WebInterface.
2. Open the procedure configuration tab of the procedure you want to use as an insert procedure.
3. Select the category to which you want to link the procedure in the field ***Linked to*** category of the section ***Category*** in the tab ***Procedure***.
4. Select the radio button ***Insert*** below the field Linked to category.
5. Click on the **Save** button in the ribbon above the procedure tab to save the configuration.
6. The section ***Category*** in the tab ***Procedure*** will disappear from the tab. The ribbon above has changed and now contains a link to the category. Click on the icon to open the Category configuration tab.

7. The category configuration screen opens in a new tab. Here we have to define the procedure as the insert procedure of our object. Therefore, open the list of the field ***Add*** of the section ***Actions*** and select the procedure:

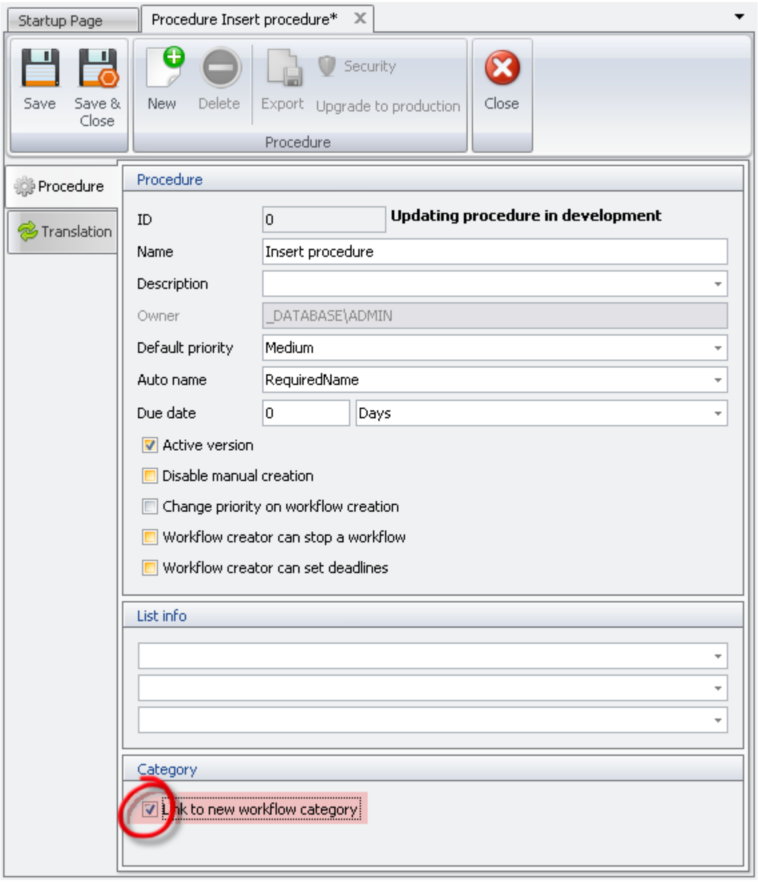


8. Click on the **Save** button in the ribbon above the category tab to save the configuration.

7.3 How to link a procedure as an insert procedure to a new category

To link a procedure as an insert procedure for a new category:

1. Open the Doma WebInterface.
2. Open the procedure configuration tab of the procedure you want to use as an insert procedure.
3. Select the checkbox ***Linkto new workflow category*** of the section ***Category*** in the tab ***Procedure***.



4. Click on the **Save** button  in the ribbon above the procedure tab to save the configuration.
5. The section ***Category*** in the tab ***Procedure*** will disappear from the tab. The ribbon above has changed and now contains a link to the category. Click on the icon to open the Category configuration tab.

6. The category configuration screen opens in a new tab. Here we have to define the procedure as the insert procedure of our object. Therefore, open the list of the field ***Add*** of the section ***Actions*** and select the procedure. Next to that, we also have to configure the category.

8 Daily administration of workflows

8.1 Unlock a workflow

When a user opens the detail of a workflow in his work list, the workflow is locked by this user. Other users to whom the workflow was also assigned (and who also see it in their work list) can only view the locked workflow in read-only.

Administrators can unlock workflows so that they can be opened by other users, e.g. when the user who has locked the workflow has become ill and the work has to be done by another user.

When unlocking a workflow, it becomes available to edit again to the users who have it in their work list.

Select the tab ***Administration*** and click on the button ***Unlock*** to unlock the workflow:

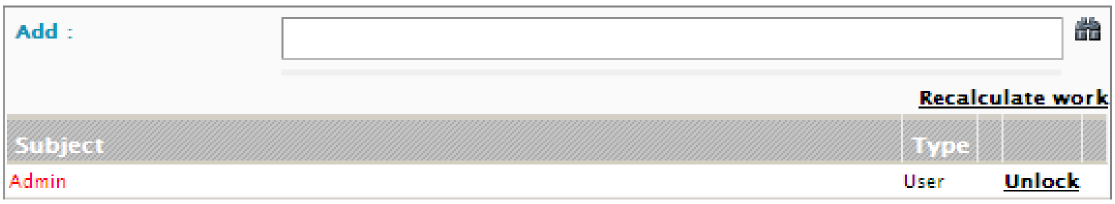
The workflow is immediately unlocked..

8.2 Edit the work list of the workflow

Sometimes you have to assign a workflow to an extra user, you have to lock or unlock a workflow or you want to recalculate the work of a step.

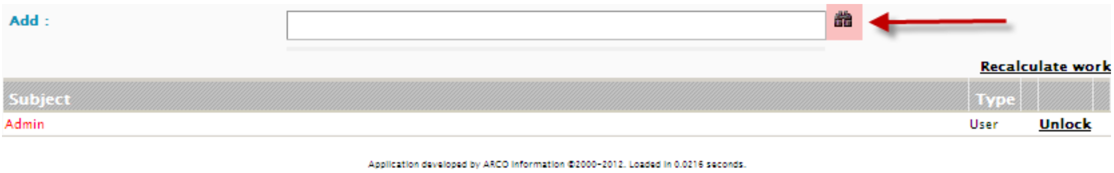
To do so, select the tab ***Administration*** and click on the button ***Edit work list*** to edit the work list of the workflow:

The administration screen for the work list appears in the right pane of the screen:

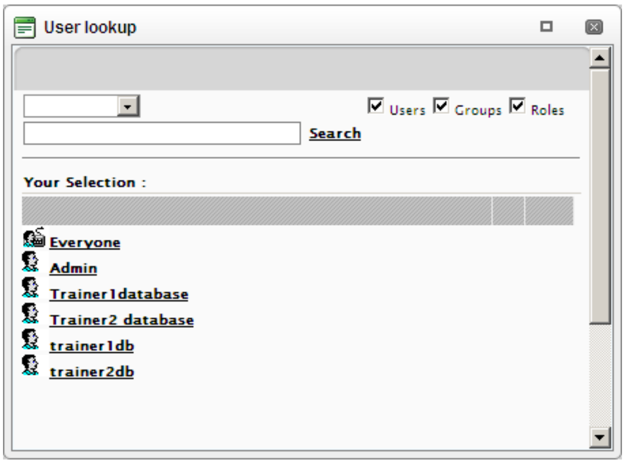


8.2.1 Add a user to the work list

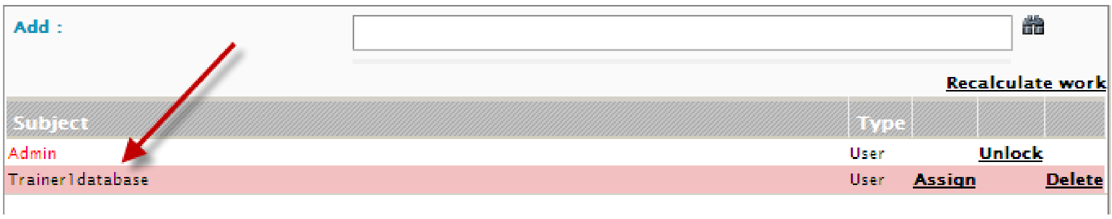
Click on the Find icon next to the field ***Add***.



The user lookup window appears in a pop-up window:



Click on a user in the list to select: the user will appear in the work list:

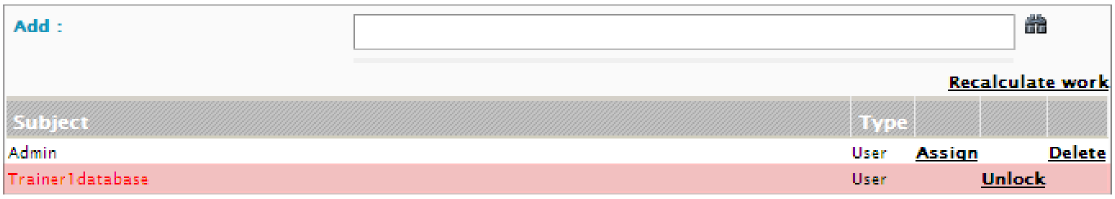


8.2.2 Assign work to a(nother) user

Click on the option ***Assign*** next to the user:

The workflow is immediately assigned to the user and will be locked for the other users.

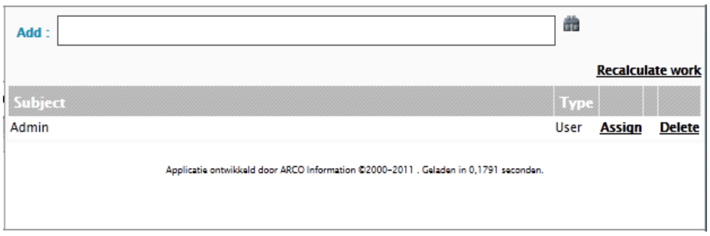
The name of the user to who the workflow is assigned, appears in red. The option **Unlock** appears next to the name:



8.2.3 Recalculate work of a workflow

Click on the option **Recalculate work**.

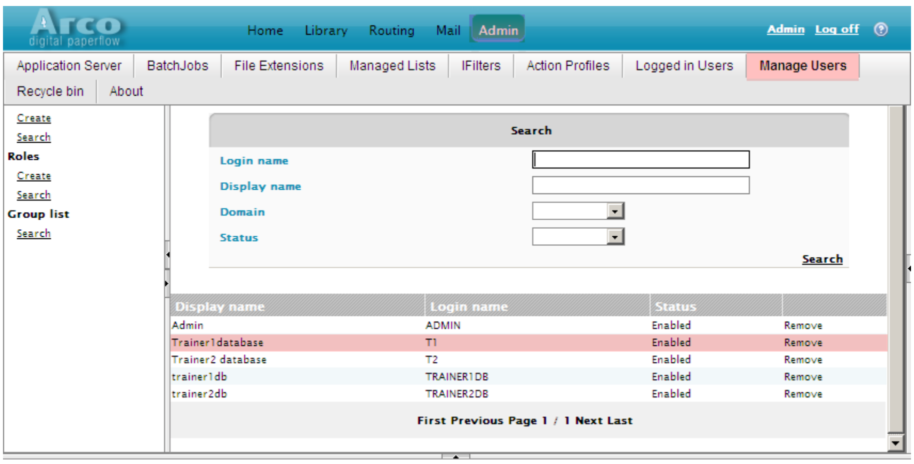
The work is immediately recalculated to the original work list:



8.3 Delegate the worklist of a user to someone else

Application administrators can delegate the work list of a user to another user by doing the next actions:

1. Open the user list by clicking on the item ***Manage Users*** in the ***Admin*** tab of the Doma WebInterface:



2. Double click on the user who's work list you want to delegate to another user. The user detail appears.

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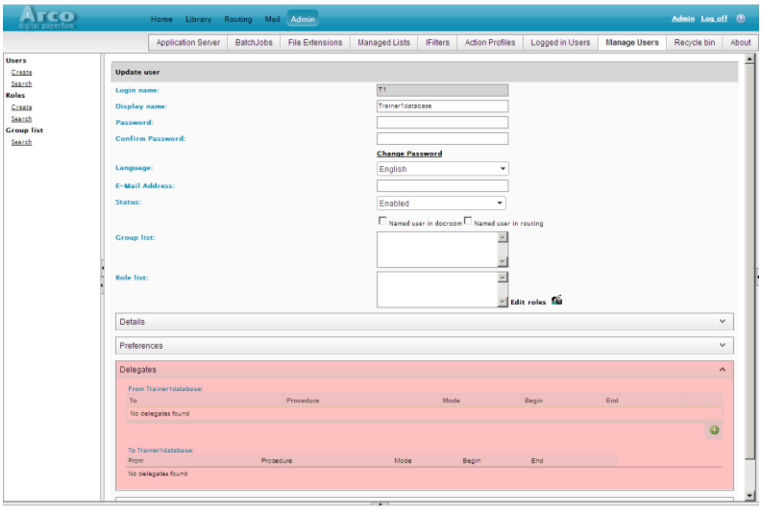
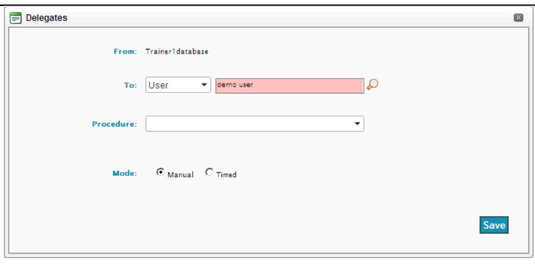
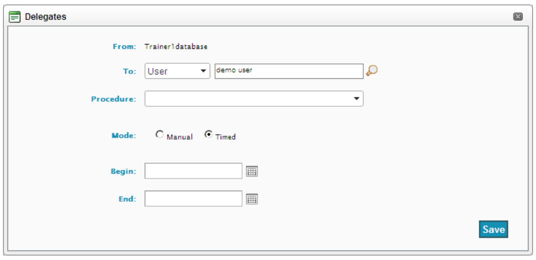
3. Open the item ***Delegates*** in the user detail.



4. Click on the ***Add*** icon in the part From (Name of the user) to add a new delegation.

5. The delegates window pops up: configure the delegation:

 	**To**	select here the user or role to whom the work will be assigned.
	Procedure	Allows to limit the delegation to one procedure: only work of this procedure will be delegated to the selected users/roles.
	Mode	**Manual**: start and end of the delegation have to be defined manually. **Timed**: begin and end time of the delegation are defined and will be triggered automatically.

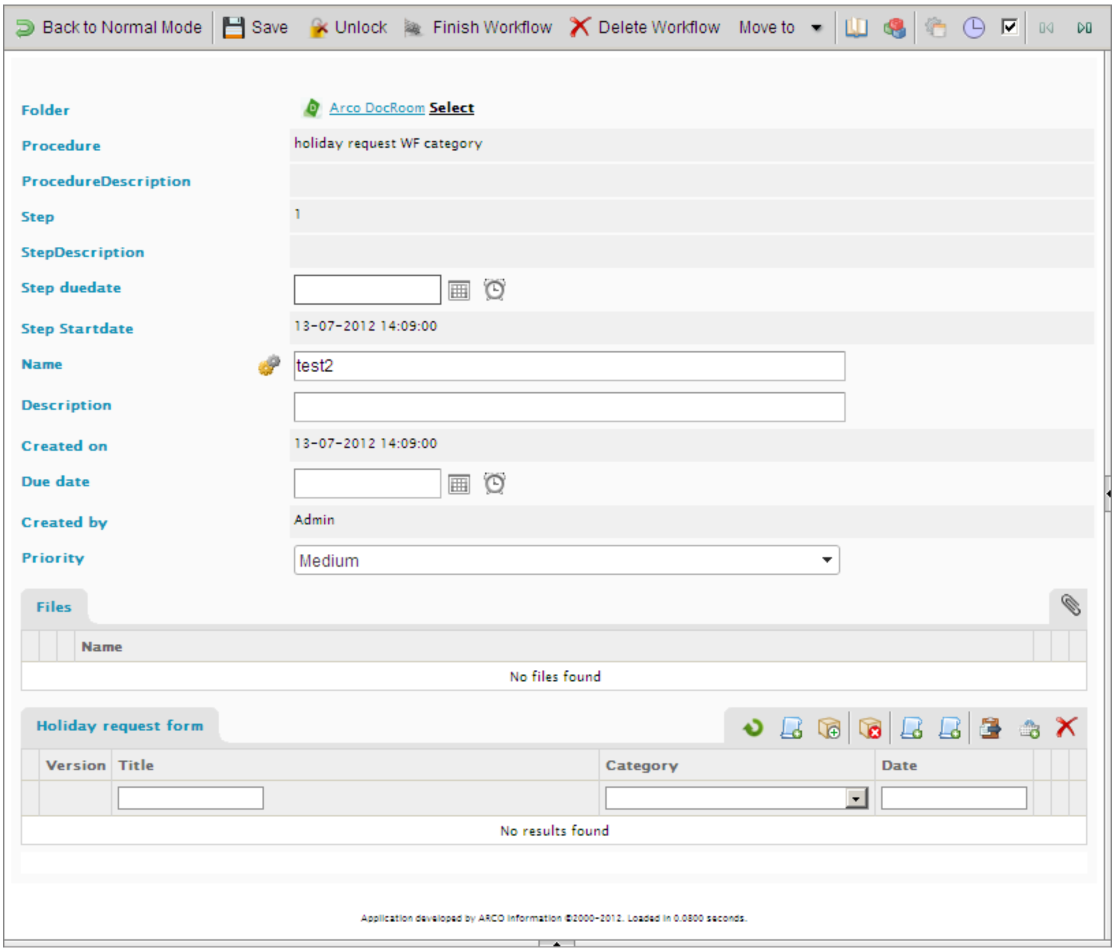
6. Click on the ***Save*** button to save your changes. From now, the work list of the user will be delegated as configured.

8.4 Edit the workflow details

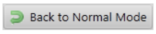
To edit the workflow details of a step as an administrator:

1. Open the Doma WebInterface.
2. Search the workflow in the list Open Dossiers.
3. Double click on the workflow in the list to open the detail screen.
4. Select the tab ***Administration***.
5. Click on the button ***Edit in Admin Mode*** to edit the workflow details:

The detail screen appears. The properties are shown as editable properties. Make your changes.



Click on the ***Save*** button  in the toolbar to save your changes.

Click on the button ***Back to Normal Mode***  to return to the normal view.

8.5 Move a workflow to another step

For some reasons, workflows sometimes have to be moved to another step of the procedure.

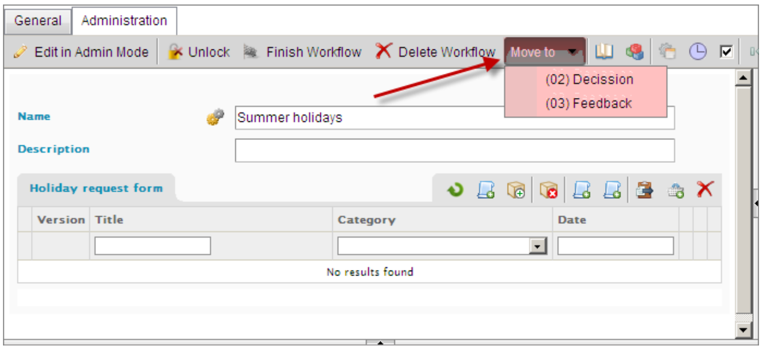
An application administrator can do this.

After the step has been moved, it remains assigned to the actual user who was working on the step.

Recalculate the work of the step to reassign the workflow to the default step executors of the step where the workflow is moved to.

To move the workflow to another step:

1. Open the Doma WebInterface.
2. Search the workflow in the list Open Dossiers.
3. Double click on the workflow in the list to open the detail screen.
4. Select the tab ***Administration***.
5. Open the list ***Move to*** and click on the step where you want to move the workflow to.



6. The workflow is immediately moved to the selected step.

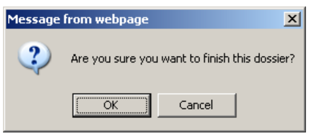
8.6 End a workflow

Application administrators can end a workflow before it has run through the complete flow. The finished workflow is immediately moved to the Routing archive.

To end a workflow:

1. Open the Doma WebInterface.
2. Search the workflow in the list Open Dossiers.
3. Double click on the workflow in the list to open the detail screen.
4. Select the tab ***Administration***.
5. Click on the button ***Finish WorkFlow*** to edit the workflow details:

A confirmation screen appears:



Confirm to end the workflow. The workflow will be moved to the Routing Archive.

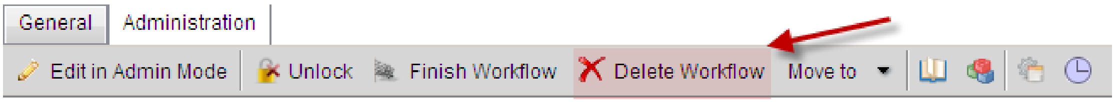
8.7 Delete a workflow

Sometimes a workflow isn't relevant anymore. In that case the workflow can be deleted.

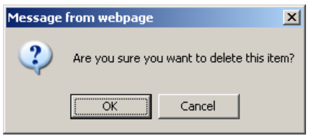
Mind! When deleting a workflow, it is not moved to the archive.
When you're not sure that the workflow can de deleted, choose the option ***Finish workflow*** instead of ***Delete workflow***.

To delete a workflow:

1. Open the Doma WebInterface.
2. Search the workflow in the list Open Dossiers.
3. Double click on the workflow in the list to open the detail screen.
4. Select the tab ***Administration***.
5. Click on the button ***Delete WorkFlow*** to edit the workflow details:



A confirmation screen appears:



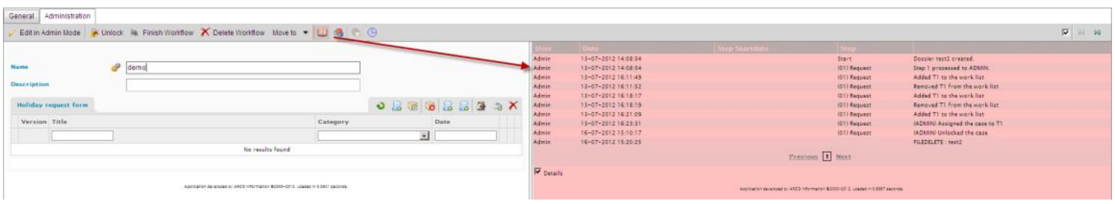
Confirm to delete the workflow. After deletion, it looks like the workflow has never existed.

8.8 View the dossier history

The workflow history shows all actions done on the workflow. Open it to see who has done what for this workflow.

To view the workflow history:

1. Open the Doma WebInterface.
2. Search the workflow in the list Open Dossiers.
3. Double click on the workflow in the list to open the detail screen.
4. Select the tab ***Administration***.
5. Click on the button ***History***  view the workflow history. The overview appears in the right pane of the detail window:



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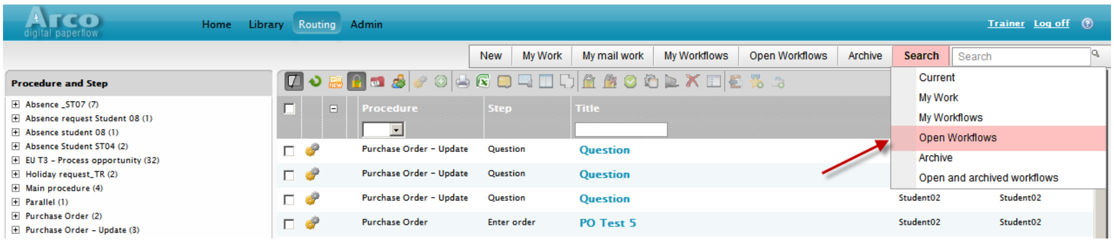
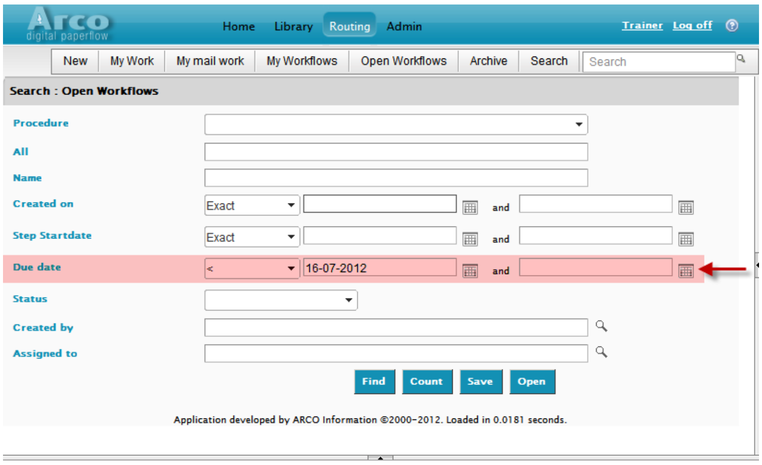
8.9 Search workflows with overdue deadlines

To search workflows with overdue deadlines:

1. Open the Doma WebInterface.
2. Select the Routing item.
3. Open the Search list and select Open Workflows.



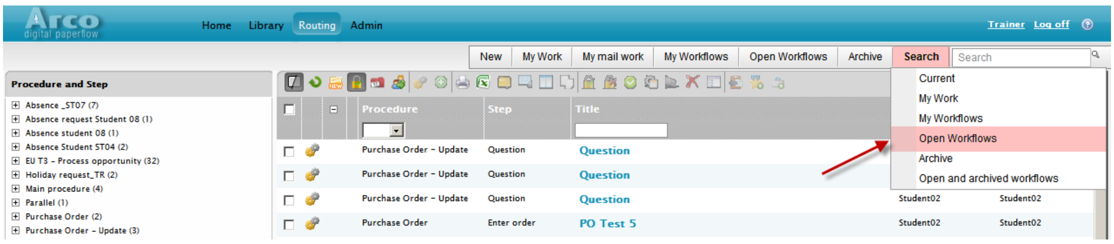
4. The search window for open workflows appears. Enter a due date smaller than the current date. The result will be a list of all overdue workflows.



8.10 Search workflows assigned to specific users

To search workflows with overdue deadlines:

1. Open the Doma WebInterface.
2. Select the Routing item.
3. Open the Search list and select Open Workflows.



4. The search window for open workflows appears. Select the user of which you want to see all his work in the field ***Assigned to***. The result will be a list of all workflows assigned to this user.

9 Icons used in the Doma WebInterterface

9.1.1 Icons in the result list of the Webinterface

Overview of the most important icons representing documents, case categories and procedures in the Doma WebInterface result lists.

9.1.1.1 Icons in DocRoom Library

 Case category in creation

 Case category of which the procedure has ended *(Mind: in DocRoom 5 this was the icon for a document in creation when a procedure is used)*

 Document in creation (also when a procedure is used to create the document)

 Document when created and available for all users (who have sufficient rights)

9.1.1.2 Icons in Routing WorkFlow

 Active procedure (My work, my dossiers, open dossiers). *This can also be a procedure of a case category.*

 Procedure that has ended (Routing Archive)

Workflow procedures cannot be found in the tree structure of the DocRoom Library.

10 Deadlines

10.1 Introduction

It is possible to define deadlines on procedure and step level.
When deadlines are put on both levels, the system will not check the consistency of procedure deadlines regarding to step deadlines.

The moment that a deadline is reached is an event to trigger some actions.
By default, no action is triggered when the deadline has been reached. Only an icon in the Routing result lists will indicate that a deadline has been reached.

The batch job ***Check expired cases*** will check whether or not deadlines have been reached.

(For more information about batch jobs, please refer to the manual ***Doma 6_Application Administrator Manual_17_Batch jobs***.)

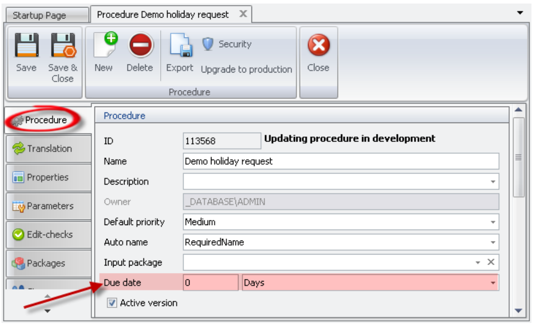
10.2 Configuration

10.2.1 On procedure level

10.2.1.1 Due date

Deadlines can be configured in the procedure configuration screen of the Doma admin module.

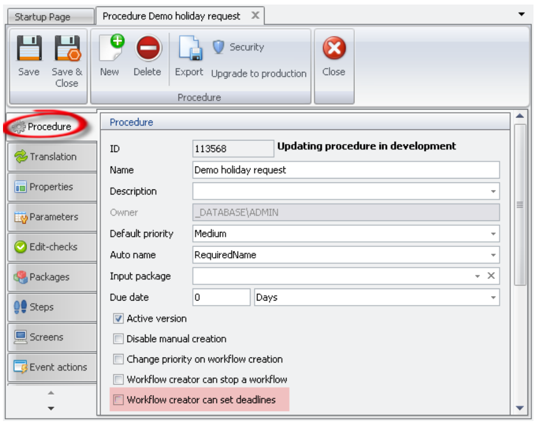
Deadlines on procedure level are defined in the tab ***Procedure*** of the procedure configuration screen and can be expressed in *hours, working hours, days, working days* and *months*.



10.2.1.2 Checkbox Workflow creator can set deadlines

☑ The user who starts the workflow can set deadlines. A toolbar button *Edit deadlines* will be available to this user in the detail screen of the workflow.

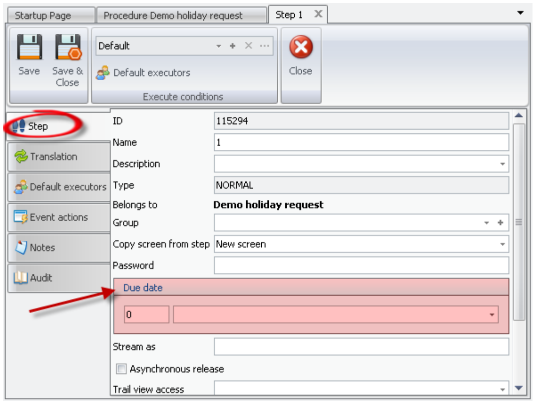
☐ The user who starts the workflow cannot set deadlines.



10.2.2 On step level

Deadlines can be configured in the procedure configuration screen of the Doma admin module.

Deadlines on step level are defined in the tab ***Step*** of the step configuration screen and can be expressed in *hours, working hours, days, working days* and *months*.



10.2.3 Parameters that influence the deadlines: holidays and working hours

Deadlines can be expressed in working hours or working days.

- When expressed in working days, the deadline will take holidays into account. Holidays can be defined by the application administrator in the Doma admin module.
- When expressed in working hours, the deadline will take only the working hours into account. Working hours can be defined by the application administrator in the Doma admin module.

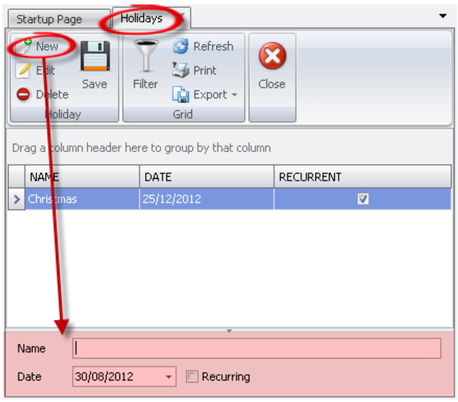
10.2.3.1 Definition of holidays

Holidays can be configured in the ***item Holidays*** of the ***Settings*** part of the Doma admin module.

10.2.3.1.1 Toolbar

Item	Description
New Holiday	Create new holiday.
Edit Holiday	Edit the holiday selected in the list.
Delete Holiday	Delete the holiday selected in the list.
Save Holiday	Save settings.
Filter Grid	Activate filter on the list of holidays.
Refresh Grid	Refresh the list of holidays.
Print Grid	Print the holiday list.
Export Grid	Export the list of holidays to the selected file.
Close	Close the holidays configurations tab.

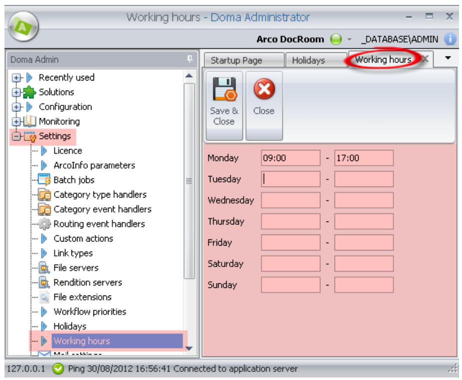
10.2.3.1.2 Add Holiday



- Open the holiday configuration tab in the Doma admin module.
- Clik on the button New in the ribbon.
- The fields to enter a new holiday appear at the bottom of the screen.
- Enter the holiday.
- Click on the Save button in the ribbon.

10.2.3.2 Definition of working hours

Working hours can be configured in the ***item Workking hours*** of the ***Settings*** part of the Doma admin module.



- Enter the working hours.
- Click on the button Save in the ribbon.

10.3 Deadlines and user interface

10.3.1 Screen items related to deadlines

Screen items are defined in the tab Screen items on step level.

Available screen items:

- Step Duedate = due date of the step
- Due date = first due date, whether step or procedure due date

10.3.2 Deadlines in result lists

4 columns refer to deadlines:

1. column name="deadlineicon"

Shows an icon that indicates the deadline status:

Icon	Description
(none)	No deadline defined.
	Deadline in the future.
	Urgent. Deadline will be reached within 24 hours.
	Deadline expired.

2. column name="duedate"

first due date, whether stepduedate or caseduedate.

3. column name="caseduedate"

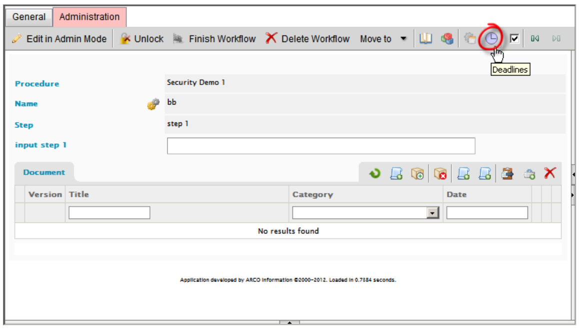
Shows the due date of the workflow.

4. column name="stepduedate"

Shows the due date of the step.

10.3.3 Deadlines and application administrators

Application administrators can change deadlines on workflow level by clicking on the ***Deadlines*** button in the toolbar of the ***administration*** tab of the workflow detail:

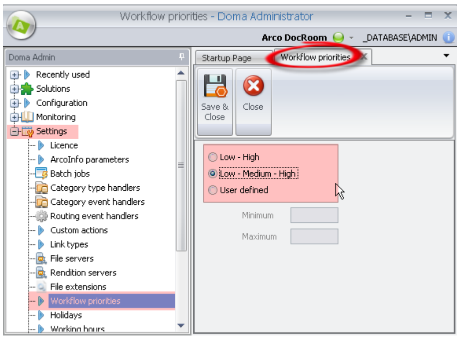


11 Workflow priority

Each procedure has a priority level. This level defines the position of the workflow in the result list: the higher the priority, the higher the item will appear in the list.

11.1 Priority levels

The application administrator can define different priority levels on application level.
This can be configured in the item workflow priorities in the Settings part of the navigation tree of the Doma admin module.

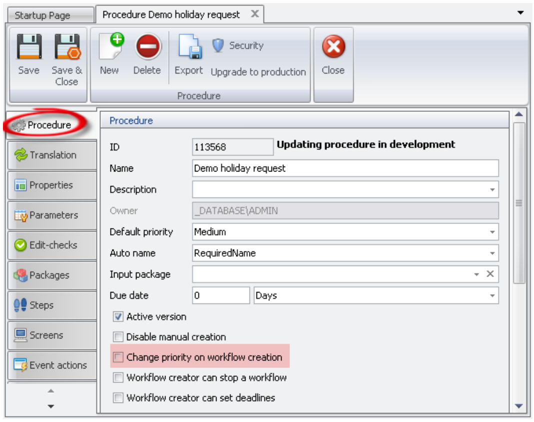


11.2 Setting priority on procedure level

11.2.1 Checkbox Change priority on Workflow Creation

☑ The user who starts the workflow can change the priority level of the workflow.

☐ The user who starts the workflow cannot change the priority level of the workflow.



12 Customization: event actions, user events and event handlers

Please refer to the manual ***Doma 6_Application Administrator Manual_11_Events and actions***.

13 Security

Please refer to the manual ***Doma 6_Application Administrator Manual_14_Security and Action Profiles***.

14 Versioning

Will be explained in a future version of this manual.

15 Import/export

Please refer to the manual ***Doma 6_Application Administrator Manual_19_Import Export Solutions.***

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16 User types

Routing users can be database users or synchronized network users. Also groups can be synchronized from the network. Next to that Routing can use roles and some specific Routing users.

Overview of specific Routing users and roles

User/Role	Description
Case creator	User who started the workflow.
Step executor	User who released the previous step.
Assignee	User selected from a property list of the type assignee. Allows users to do a dynamic selection of the user who will execute a later step.
Child role	A child role is a role that is part of an hierarchical structure. This role is situated on level lower than the current role.
Parent role	A parent role is a role that is part of an hierarchical structure. This role is situated on level higher than the current role.

For more information about general user management, please refer to the manual ***Doma 6_Application Administrator Manual_02_User Management.***

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17 Configuration examples

17.1 Step by step example of a simple procedure configuration

17.1.1 Introduction

The configuration of a procedure is an intense work, based upon a good functional and technical analysis.

In this exercise, we will start with a basic configuration of a simple holiday request procedure by doing a minimum of configuration. This includes:

- Creation of a new procedure
- Definition of procedure security
- Creation of procedure properties
- Creation of steps
- Configuration of step content
- Configuration of step lay-out
- Configuration of step security

In this exercise, we will create the next *Holiday request procedure*:

Step 1: Holiday request by an employee by filling in a form that contains the fields name, start date and end date.

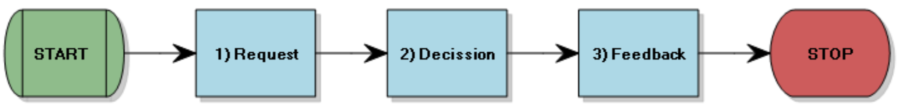
Request is sent to the superior of the requester.

Step 2: Superior sees the request and approves or rejects.

Request and the decision of the superior are returned to the requester.

Step 3: Requester receives the superior's decision.

After creation, we should have a procedure containing 3 steps:



Follow the following instructions step by step and learn how you can create your own procedure.

17.1.2 Creating the procedure

17.1.2.1 procedures: the basics

In order to create a procedure, we start a client application, called the ***Doma admin module***. This module is always installed on the server and can also be installed on a client PC.

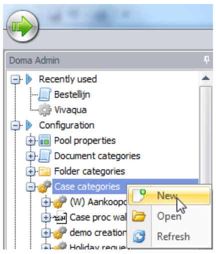
In this module, we can create all necessary parts of a procedure, e.g. pool properties, the procedure itself, procedure properties and packages, screens, etc.

Though it is not necessary to follow the order of creation in our exercise, we advise to follow certain logic for the creation of a procedure.

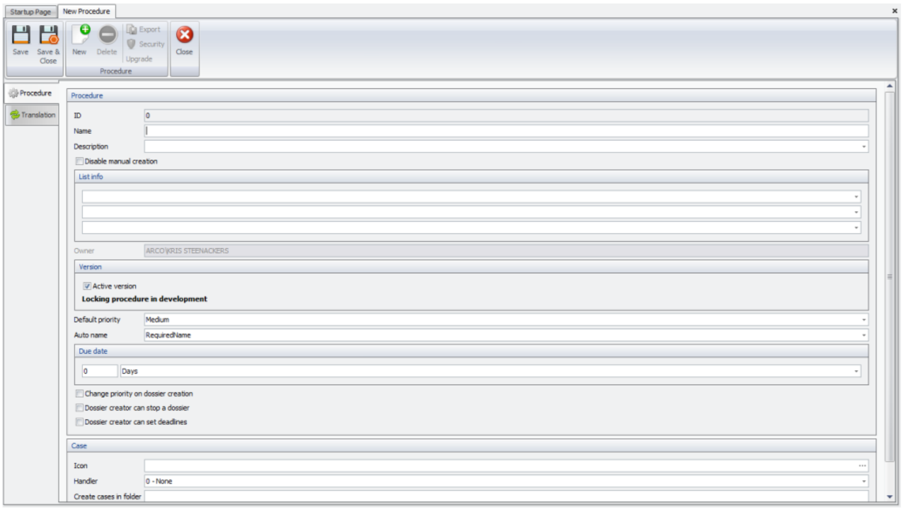
17.1.2.2 Create a new procedure

1. Open the Doma Admin module. This module is always installed on the server and can also be installed on a client PC.

2. Put the cursor on the item **Procedures** in the navigation tree and click on the right mouse button. A menu appears: select **New**.



3. A new configuration tab with the name *New Procedure* now appears. This tab itself consists initially out of 2 tabs: *Procedure* and *translation*.



17.1.2.3 Basic configuration

1. Enter the name **Holiday Request** in the field **Name**.

2. If you want to, you can enter a short description about the procedure in the field *Description*. This info can be shown when the procedure is started or in a step detail.

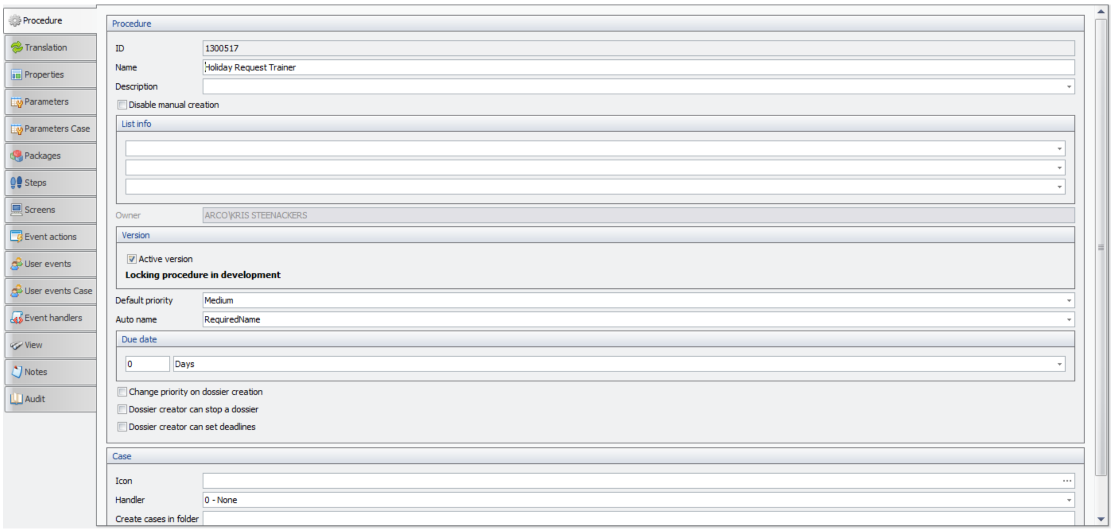
3. In the part *Version*, you can see that this is the active version of your procedure and that the procedure is ***Locking in development***. As long as the procedure is in development, it will only be available for application administrators and it will be hidden for normal users.

Procedures in development

- Are only visible for administrators in the web interface
- Each step of the procedure is assigned to the application administrators, allowing then to check the look and feel of each procedure step.
- By clicking on the option ***Upgrade*** in the toolbar of the configuration tab, you can upgrade the status form *in development* to *in production*.

4. Save by clicking the button in the toolbar. Note that the name of the procedure on top of the configuration tab has changed into the name you entered in the field *Name* of the tab *Procedure*.

5. When we save our procedure, other tabs appear in the procedure configuration tab and some extra toolbar items become enabled.

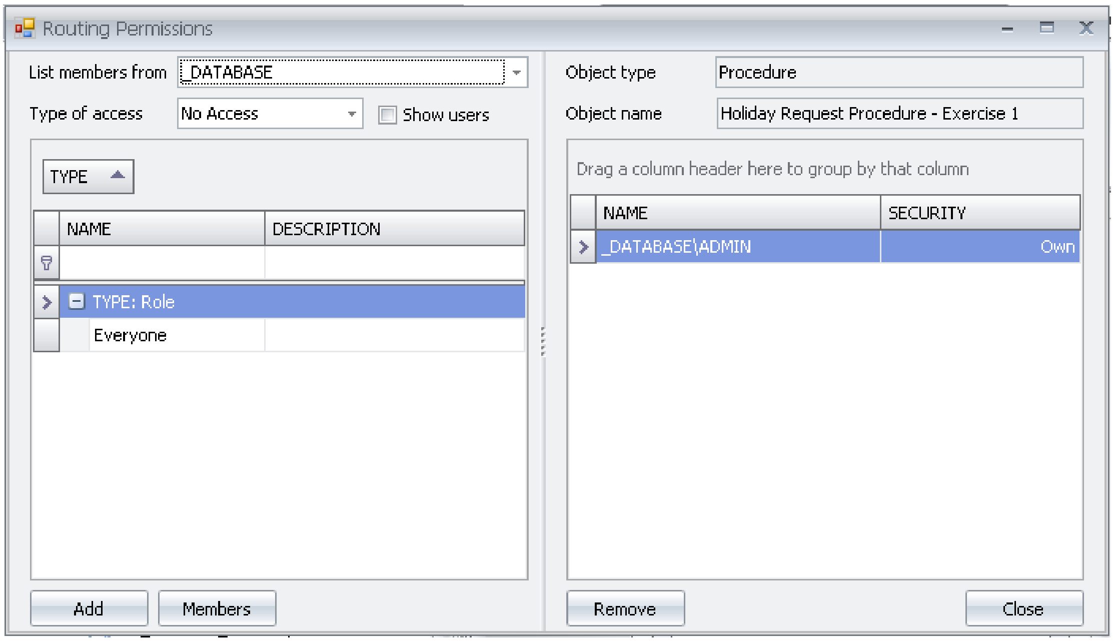


17.1.2.4 Set procedure security

Now we will define the procedure security:

1. Make sure that the tab *Procedure* is selected.
2. Click on the button Security in the toolbar.
3. The routing permissions window appears:

The left part of the screen shows all configuration items.
The right part of the screen shows the actual security settings.



4. First, we will grant full control rights on the procedure to the administrator:
5. Do the next steps to configure the security:

    1. List members from: Select _DATABASE.
    2. Type of access: Full Control.
    3. Select the checkbox Show users.
    4. In the list below this fields, select the user *administrator* (by scrolling or by using the filter)
    5. Then click on the button Add under the list.
    6. The user *administrator* will now appear with the security level Full Control in the list at the left.

6. Now do the same for your user.
7. Finally, delete all other users from the security list at the left (if any). Select them in the list and click on the button Remove below.
8. Close the window after this configuration.

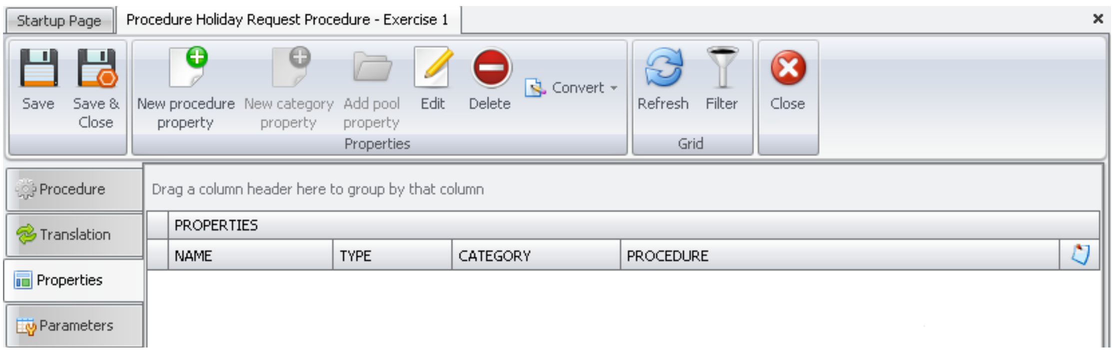
As a result of these settings, only the *administrator* and your user are allowed to work on this procedure. Other users don't see it in the Routing WebInterface.

17.1.2.5 Create / link properties

About properties – the basics

- Properties in DocRoom and Routing are information carriers: there fields allow us to enter information about a document, a folder or a case, and thus they allow us to find them.
- There are two major groups of properties in DocRoom:
    - **Pool properties**, which can be linked to all documents, folders, case categories and procedures. They allow us to search over the different categories.
    - **Category linked properties**: they are created on category level and therefore they can only be used for the specific category they were linked to. Depending upon the category, we can distinguish document properties, folder properties, procedure properties and case category properties.
- There is only one group of properties in a Routing procedure: **procedure properties.**
- Properties can be **indexed** or **not indexed:**
    - Indexed properties can be used for search. They can be divided into 3 groups: “normal” indexes, “none” and “full text” indexes.
    - Not-indexed properties give extra information that cannot be used to search on.
- There is **no limitation** in the **number** of indexes you can create for a procedure or category, but keep in mind that:
    - you need enough indexes to allow other users to find your documents in an easy way.
    - Every index that isn’t used to find a document is redundant information that takes extra time to index the item when it is added to the system and also the database will expand more.

1. First select the tab ***properties***:



From here, you can:

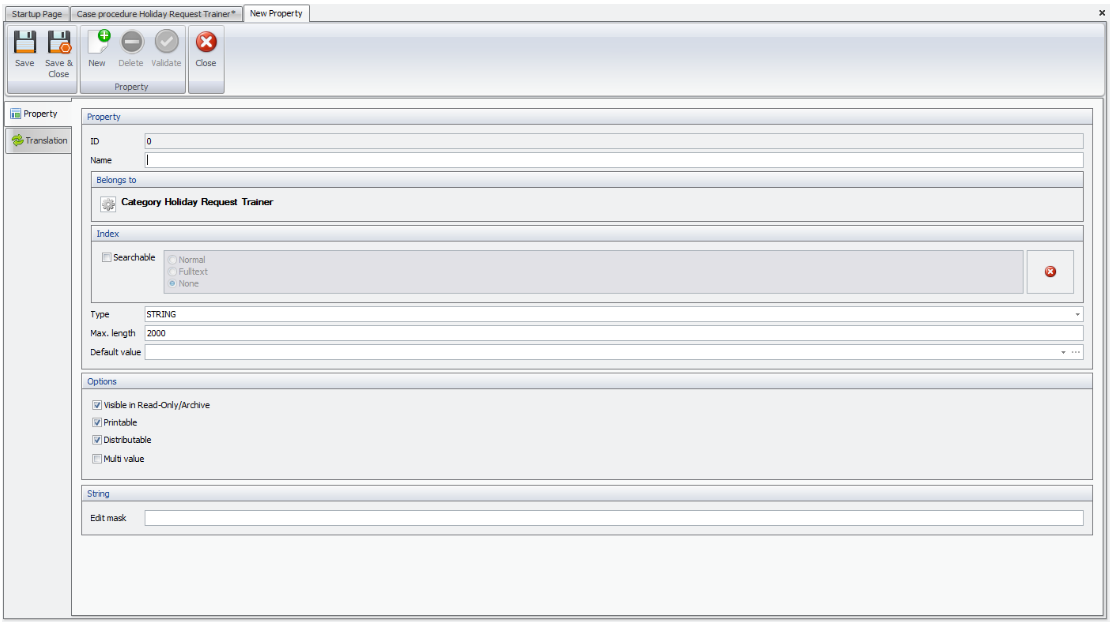
- Create new procedure properties.

All properties of the procedure will be shown in this tab.
They will be available in each step of the procedure, next to other, more general properties.

2. Create the first procedure property:

Click on the button ***New procedure property*** in the toolbar.

A new tab with the name New Property appears:



3. Configure this property as follows:

   a. Tab Property – field Name: Requested by

   b. Tab Property –Check the option Searchable / Normal

   c. Tab Property – field Type: String

   d. Tab Property – field Max. Lenght: 100

   e. Tab Translation – field English: requested by

   f. Tab Translation – field French: demandeur

   g. Tab Translation – field Dutch: aangevraagd door

4. Save by clicking the button  in the toolbar; another 3 tabs appear in the property configuration tab.

5. Click on the ***Close*** button in the toolbar of the property. The property configuration tab is closed. As a result, the procedure configuration tab is visible again.

6. Now create the next properties as shown in the example above:

Name	Searchable	Type	Max. Length	Remark
Start date	yes	date	/	
End date	Yes	date	/	
Approved?	yes	Boolean	/	Default value = True

17.1.2.6 Create steps

Since we have created all necessary properties, we will now create the different steps of our procedure.

1. Select the tab ***View***. You will see a START step and a STOP step and an overview of all step types in a frame at the right side of the window. The NORMAL step type is by default selected, which means that the step that you create is one of this type.

2. **Create a new step**:

    a. Put the cursor in the white background

    b. Click on the left mouse button and drag the mouse to any direction.

    c. Release the left mouse button.

    d. Next to the step icon you have created, the Create step window will now pop-up.

    e. Enter the step name ***Request*** in this window and click on the OK button. The name will appear in the step icon.

3. Repeat this action and create the steps ***approval*** and ***feedback***. Both steps are also normal steps.

4. **Connect the steps**:

    a. Select the start step with a mouse click.

    b. Put the cursor on the white dot in the center of the step.

    c. Press the left mouse button and slide it to the next step.

    d. Release the mouse button.

    e. The Start step and the step request are now connected by an arrow.

    f. Connect the other steps and save.

17.1.2.7 Step configuration

Now we can configure each step.

1. Double click on the step **request**.

2. A new configuration tab with the name ***Step Request*** appears.

3. This tab itself contains several tabs:

a. Tab **Step**: general step settings

b. Tab **Translations**: translations of step name, description and tooltip.

c. Tab **Default executors**: list of the default executors of this step

d. Tab **Event actions**: overview of all event actions of the step. (actions that will be executed automatically at a certain moment.)

e. Tab **Notes**: overview of the notes of developers and application administrators

f. Tab **Audit**: overview of the actions done on this step.

4. For now, we don't change anything to the default configuration of this step. Click on the ***Save*** button to save the configuration. After save, some extra tabs appear:

   a. Tab **Screen items**: here you define which items will be shown in this step and link a custom handler to the step.

   b. Tab **Screen actions**: defines the toolbar of the step

   c. Tab **Validation scripts**: here you can write a Javascript for validates that will be executed on client level.

17.1.2.8 Define step lay-out

*The step lay-out is configured in the tabs **Screen items** and **Screen actions**.*

1. First select the tab **Screen items**.

There are different types of items: fixed, ObjectProperty, Tab, Html, TemplateBlock, EndTemplateBlock.

Each item can be represented in different appearances: Default, Read-Only, Change, Mandatory.

2. Add the next screen items to the screen:

Type	Name	Mode
Fixed	Procedure	ItemReadOnly
Fixed	Name	ItemReadOnly
Fixed	Step	ItemReadOnly
ObjectProperty	Requested by	ItemMandatory
ObjectProperty	Start date	ItemMandatory
ObjectProperty	End date	ItemMandatory

3. Now select the tab **Screen actions**.

In this tab you define which icons will appear in the step toolbar.

There are different types of screen actions: UserEvent, Separator, Tab.

4. Keep the default Screen actions configuration.

17.1.2.9 Define step executors

Default step executors are the users, groups and/or roles to who the step will be assigned for execution. (They will see the step in their work list).

1. Select _DATABASE in the field *List members from*.
2. Select _CASE_CREATOR in the user list at the right.
3. Click on the button Add.
4. The user will now appear in the step security list at the right.
5. Click on the ***Close*** button.

The step is now assigned to the user who has started the procedure.

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17.2 Step by step example of a simple workflow category configuration

17.2.1 Introduction

The configuration of a workflow category is an intense work, based upon a good functional and technical analysis.

In this exercise, we will start with a basic configuration of a simple holiday request workflow category by doing a minimum of configuration. This includes:

- Creation of a new workflow category.
    - Configuration of category properties
    - Configuration of category packages (if any)
    - Configuration of category security

- Configuration of the insert procedure of the workflow category.
    - Definition of procedure security
    - Creation of procedure properties
    - Creation of steps
    - Configuration of step content
    - Configuration of step lay-out
    - Configuration of step security

In this exercise, we will create the workflow category *Holiday Request WorkFlow Category*. Linked to it, there is an insert procedure which will be configured like shown below:

Step 1: Holiday request by an employee by filling in a form that contains the fields name, start date and end date.

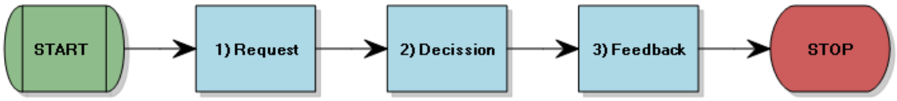
Request is sent to the superior of the requester.

Step 2: Superior sees the request and approves or rejects.

Request and the decision of the superior are returned to the requester.

Step 3: Requester receives the superior's decision.

After creation, we should have a procedure containing 3 steps:

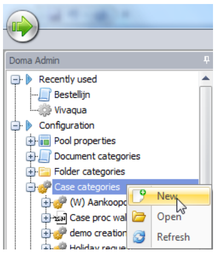


Follow the following instructions step by step and learn how you can create your own procedure.

17.2.2 Create a new workflow category

1. Open the Doma Admin module. This module is always installed on the server and can also be installed on a client PC.

2. Put the cursor on the item **Workflow Categories** in the navigation tree and click on the right mouse button. A menu appears: select **New**.



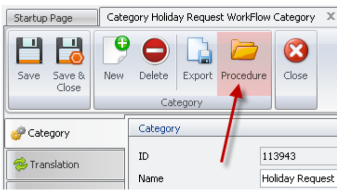
3. A new configuration tab with the name *New Category* now appears. This tab itself consists initially out of 2 tabs: *Category* and *translation*.

17.2.2.1 Basic configuration of the category

1. Enter the name **Holiday Request WorkFlow Category** in the field **Name**.

2. Save by clicking the button  in the toolbar. Note that the name of the Workflow category on top of the configuration tab has changed into the name you have entered in the field *Name* of the tab *Category*.

3. When we save our category, other tabs appear in the category configuration tab and some extra items in the ribbon appear. One of them is the item ***Procedure***. Click here to open the configuration tab of the insert procedure for this workflow category.



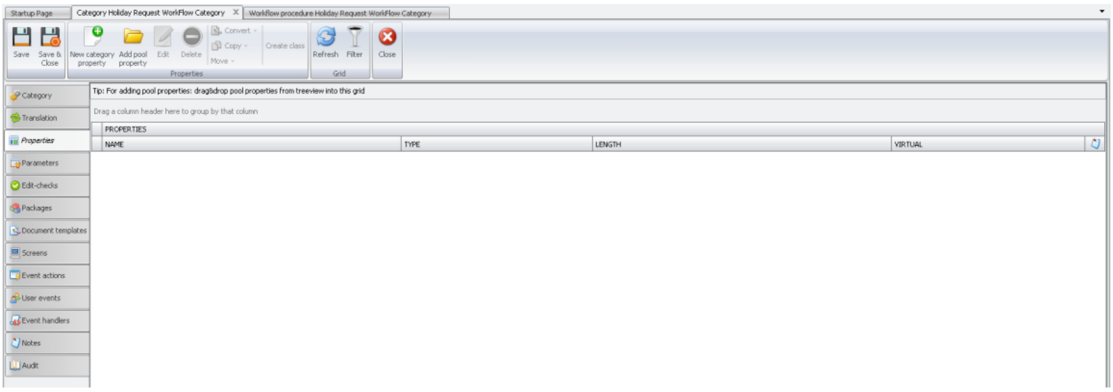
17.2.2.1.1 Create / link properties

About properties – the basics

- Properties in DocRoom and Routing are information carriers: there fields allow us to enter information about a document, a folder or a case, and thus they allow us to find them.

- There are two major groups of properties:
    - **Pool properties**, which can be linked to all documents, folders, case categories and procedures. They allow us to search over the different categories.
    - **Category linked properties**: they are created on category level and therefore they can only be used for the specific category they were linked to. Depending upon the category, we can distinguish document properties, folder properties, procedure properties and case category properties.
- Properties can be **indexed** or **not indexed:**
    - Indexed properties can be used for search. They can be divided into 2 groups: “normal” indexes and “full text” indexes.
    - Not-indexed properties give extra information that cannot be used to search on.
- There is **no limitation** in the **number** of indexes you can create for a category, but keep in mind that:
    - you need enough indexes to allow other users to find your documents in an easy way.
    - Every index that isn’t used to find a document is redundant information that takes extra time to index the item when it is added to the system.

1. First select the tab ***properties***:



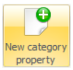
From here, you can:

- Drag & drop existing pool properties so they are linked to this workflow category.
- Create new category properties.

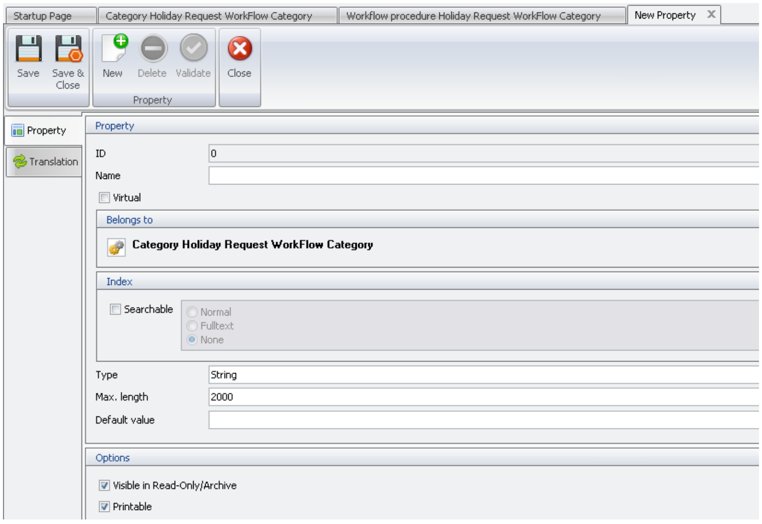
Procedure properties are created on the level of the insert procedure that is used for this workflow category.

All properties of the workflow category will be shown in this tab.
They will be available in each step of the insert procedure, next to other, more general properties.

2. Create the first category property:

Click on the button  in the toolbar.

A new tab with the name New Property appears:



3. Configure this property as follows:

   a. Tab Property – field Name: Requested by

   b. Tab Property –Check the option Searchable / Normal

   c. Tab Property – field Type: String

   d. Tab Property – field Max. Lenght: 100

   e. Tab Translation – field English: requested by

   f. Tab Translation – field French: demandeur

   g. Tab Translation – field Dutch: aangevraagd door

4. Save by clicking the button  in the toolbar; another 3 tabs appear in the property configuration tab.

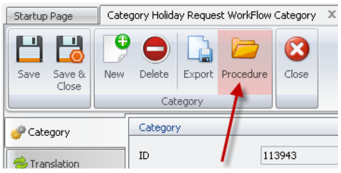
5. Click on the ***Close*** button in the toolbar of the property. The property configuration tab is closed. As a result, the category configuration tab is visible again.

6. Now create the next properties as shown in the example above:

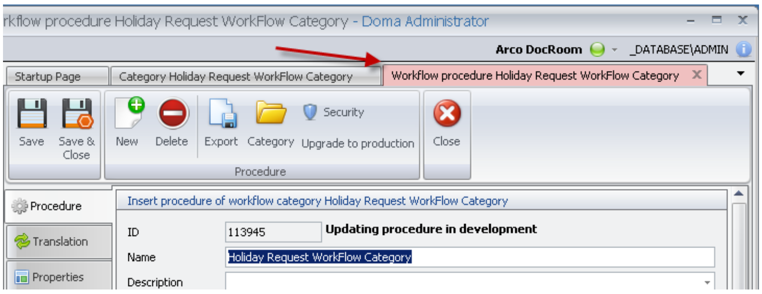
Name	Searchable	Type	Max. Length	Remark
Start date	yes	date	/	
End date	Yes	date	/	
Approved?	yes	Boolean	/	Default value = True

17.2.2.2 Basic configuration of the insert procedure of the category

1. Select the tab ***Category***. In the ribbon, click on the icon ***Procedure*** to open the configuration tab of the insert procedure for this workflow category.



2. The configuration tab of the insert procedure of the workflow category opens in a new tab.

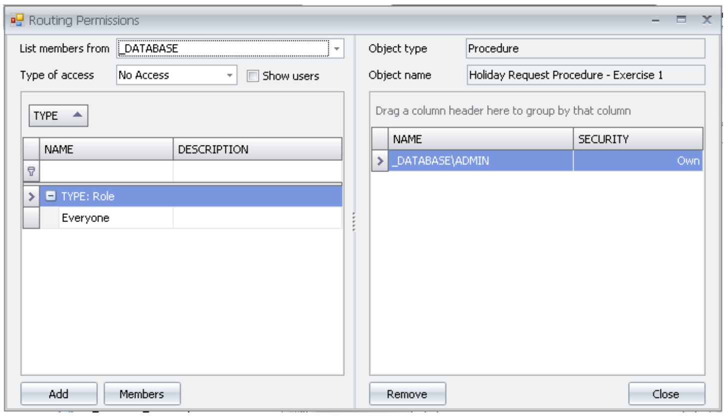


17.2.2.2.1 Set procedure security

Now we will define the procedure security:

1. Click on the button  in the toolbar.

2. The routing permissions window appears:



The left part of the screen shows all configuration items.

The right part of the screen shows the actual security settings.

3. First, we will grant full control rights on the category to the administrator:

4. Do the next steps to configure the security:

    1. List members from: Select _DATABASE.
    2. Type of access: Full Control.
    3. Select the checkbox Show users.
    4. In the list below this fields, select the user administrator (by scrolling or by using the filter)
    5. Then click on the button Add under the list.
    6. The user administrator will now appear with the security level Full Control in the list at the left.

9. Now do the same for your user.

10. Finally, delete all other users from the security list at the left (if any). Select those in the list and click on the button Remove below.

11. Close the window after this configuration.

17.2.2.2.2 Create steps

Since we have created all necessary properties, we will now create the different steps of our procedure.

1. Select the tab ***View***. You will see a START step and a STOP step and an overview of all step types in a frame at the right side of the window. The NORMAL step type is by default selected, which means that the step that you create is one of this type.

2. **Create a new step**:

    a. Put the cursor in the white background

    b. Click on the left mouse button and drag the mouse to any direction.

    c. Release the left mouse button.

    d. Next to the step icon you have created, the Create step window will now pop-up.

    e. Enter the step name ***Request*** in this window and click on the OK button. The name will appear in the step icon.

3. Repeat this action and create the steps ***approval*** and ***feedback***. Both steps are also normal steps.

4. **Connect the steps**:

    a. Select the start step with a mouse click.

    b. Put the cursor on the white dot in the center of the step.

    c. Press the left mouse button and slide it to the next step.

    d. Release the mouse button.

    e. The Start step and the step request are now connected by an arrow.

    f. Connect the other steps and save.

17.2.2.2.3 Step configuration

Now we can configure each step.

1. Double click on the step **request**.

2. A new configuration tab with the name ***Step Request*** appears.

3. This tab itself contains several tabs:

    a. Tab **Step**: general step settings

    b. Tab **Translations**: translations of step name, description and tooltip.

c. Tab **Default executors**: list of the default executors of this step

d. Tab **Event actions**: overview of all event actions of the step. (actions that will be executed automatically at a certain moment.)

e. Tab **Notes**: overview of the notes of developers and application administrators

f. Tab **Audit**: overview of the actions done on this step.

4. For now, we don't change anything to the default configuration of this step. Click on the ***Save*** button to save the configuration. After save, some extra tabs appear:

   a. Tab **Screen items**: here you define which items will be shown in this step and link a custom handler to the step.

   b. Tab **Screen actions**: defines the toolbar of the step

   c. Tab **Validation scripts**: here you can write a Javascript for validates that will be executed on client level.

17.2.2.1 Define step lay-out

*The step lay-out is configured in the tabs **Screen items** and **Screen actions**.*

1. First select the tab **Screen items**.

   There are different types of items: fixed, ObjectProperty, Tab, Html, TemplateBlock, EndTemplateBlock.

   Each item can be represented in different appearances: Default, Read-Only, Change, Mandatory.

2. Add the next screen items to the screen:

Type	Name	Mode
Fixed	Procedure	ItemReadOnly
Fixed	Name	ItemReadOnly
Fixed	Step	ItemReadOnly
ObjectProperty	Requested by	ItemMandatory
ObjectProperty	Start date	ItemMandatory
ObjectProperty	End date	ItemMandatory

3. Now select the tab **Screen actions**.

In this tab you define which icons will appear in the step toolbar.

There are different types of screen actions: UserEvent, Separator, Tab.

4. Keep the default Screen actions configuration.

17.2.2.1.1 Define step executors

Default step executors are the users, groups and/or roles to who the step will be assigned for execution. (They will see the step in their work list).

1. Select _DATABASE in the field *List members from*.
2. Select _CASE_CREATOR in the user list at the right.
3. Click on the button Add.
4. The user will now appear in the step security list at the right.
5. Click on the ***Close*** button.
6. The step is now assigned to the user who has started the procedure.
7. Now configure the next 2 steps.

	Step 2: approval	**Step 3: feedback**
Screen items: Properties +Mode	Requested by (read only) Start date (read only) End date (read only) Approved? (mandatory)	Requested by (read only) Start date (read only) End date (read only) Approved? (read only)
Screen actions	Remove Release to Remove Move case	
Security	Trainer	Case creator

8. Put procedure in production.

The workflow category is now created. Try it out in the webinterface.

17.3 Example of config of event actions

Will be added in a later version of this manual.

17.4 Example of config of conditional step

Will be added in a later version of this manual.

18 Glossary

Case/Dossier
Used in: Routing
Naming used in Routing versions before version 6.5; instance of a procedure, i.e. each time we start a procedure, we create a new dossier. Technically always referred to as a case.

Category
Used in: DocRoom and Routing
DocRoom object. Depending upon the kind of category, it has different properties and possibilities.

Document
Used in: DocRoom
Documents are the result of the creation of an item of a document category.
A document is the combination of properties and one or more files. It can also be a bundle of properties without a linked file.

Document Category
Used in: DocRoom
A document category is a specific document type, e.g. “invoice”, “PO”, etc.
Document categories allow us to search on the different categories and allow us to link specific properties to the different document types.
Next to this, also specific screens and actions can be linked to document categories.

Document Management
Used in: DocRoom
The **process** of **managing documents** and other types of information such as images from creation, review, storage to its dissemination.
It also involves the indexing, storage and retrieval of documents in an organized method.

Dossier/Case
Used in: Routing
Instance of a procedure, i.e. each time we start a procedure, we create a new dossier. Technically always referred to as a case.

Folder
Used in: DocRoom
Document and case category item. Part of an hierarchical tree in which your items are ordered. Also very important for security.

Folder Category
Used in: DocRoom
A folder category is a specific folder type, e.g. “personnel folder”, “customer folder”, etc.
Folder categories allow us to search on the different categories.
Each folder category can have its specific properties and can have a different icon in the tree structure.
It is also possible to link specific insert, update, search and result screens to a folder category.

Next step
Used in: Routing
Action to proceed to the next step of the procedure.

Package
Used in: DocRoom and Routing
Routing placeholder. It contains files, links to DocRoom documents or links to other Routing cases. Packages can be linked to a procedure.

Procedure
Used in: Routing
A procedure is an automation of a business process, in whole or in part, where documents, information, or tasks are passed from one participant to another for action, according to a set of rules.
Related to a procedure is a case category, which is technically almost the same, but has a different functional definition.
Procedures do not end as an item in DocRoom. All process data thus can be found in the routing archive. Therefore, procedures are used for processes that do not have an important end result in the DocRoom web interface.

Property
Used in: DocRoom and Routing
A property is a DocRoom or Routing information carrier: it contains information about the document, folder or case where it is linked to. It allows the user to find the property when he searches on the value that is linked to the document.
Synonyms: metadata, index, search key.

Example:
- For an invoice document, the supplier and amount can be properties.
- For a letter, sender, receiver and subject can be properties.

DocRoom and Routing have different kinds of properties, each have their own specific characteristics:
- Pool properties
- Document category properties
- Folder category properties
- Case category properties
- Procedure properties

Release
Used in: Routing
Naming used in Routing versions before version 6.5; action to proceed to the next step of the procedure.

Step
Used in: Routing
Part of a procedure. In a step we define an action and to this action we link the users who will have to execute the action.

Tree structure
Used in: DocRoom
Hierarchical set of folders that allow users to structure the DocRoom data. Also very important for security.
Next to a static folder structure it can contain dynamic folders.

WorkFlow category
Used in: DocRoom and Routing
A workflow category is a DocRoom object, but a Routing procedure is also linked to it.
Workflow categories are always available as an item in the DocRoom database. All process data can be visualized from the entrance in DocRoom.

WorkFlow
Used in: DocRoom and Routing
Dossier, item that is retrievable in DocRoom and Routing.

WorkFlow (2)
Used in: DocRoom and Routing

Workflow is the **automation** of a **business process**, in whole or part, during which documents, information or tasks are passed from one participant to another for action, according to a set of procedural rules.

Omega Business Park www.arco.be t +32 (0)15 289 030
Wayenborgstraat 24 – B-2800 Mechelen info@arco.be f +32 (0)15 289 031