Arco Open Training

Training Guide
For Routing Application Administrators

A new era in document management.

Doma 6

Arco Training

Training Guide for Routing Application Administrators

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1 Introduction

What you will learn

In this chapter you will:

- Learn how to use this training guide
- Learn the most important DocRoom and Routing terminology
- Get a look at the Routing start screen.

1.1 Welcome!

Welcome to the Routing Application Administrator training. This training is a part of the Arco Open training Sessions.

During this course you will learn how to administer the Routing application.

1.2 Course goal

After completing this course, you will have the skills you need to administer the Routing application.

You will be able to:

- Create / edit / delete procedures
- Follow-up dossiers
- And much more

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1.3 Routing Web Interface - Start page

Why a Webinterface?

- → Reachable via url: servername \ docroom
- → Automatic authentication based upon network login
- → Easy access from all PC's in the company network

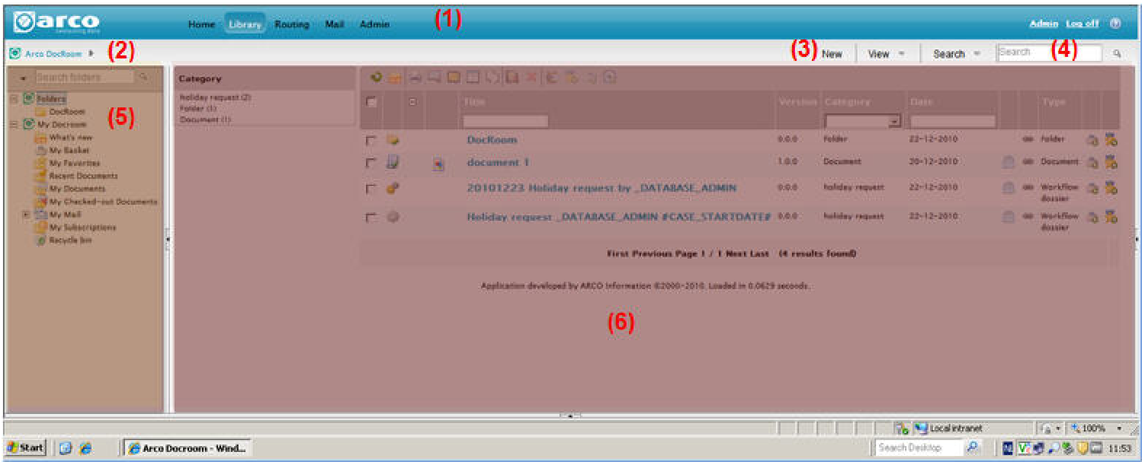
1.4 Start page

1.5 Start page

When you open the Web Interface, the start page appears.

The start page consists of several parts:

1. *Navigation bar*
2. *Breadcrumbs*
3. *Menu Bar*
4. Global search field
5. *Tree Structure*
6. *Result list*
    a. *Groupers*
    b. *Result list toolbar*
    c. *List header*
    d. *Document bar*



Select the option ***Routing*** in the navigation bar to see the Routing screen.

2 Creating procedures

2.1 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.

2.2 Creating 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 a certain logic for the creation of a procedure.

2.3 Exercise 1: Creating the procedure "Holiday Request"

In this exercise, we will do 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

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

2.3.1 Introduction – procedure description

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.

2.3.2 Procedure or case category?

In DocRoom / Routing 6 we can create a procedure that can also be visualized in DocRoom. It also ends as a DocRoom item, having its specific icon. This procedure is called a ***Case Category***.

In general, you will create a case category instead of a procedure when it is relevant to visualize the dossier in DocRoom, also after the procedure has been ended.

Thus, in case of a holiday request, both solutions are possible:

- Choose a case category when you want to save all holiday requests in the (DocRoom) dossier of the employee.
- Choose a procedure when you only want to support the process of a holiday request creation.

Since, in most cases, the approval process is more important that the result and tracks to this result afterwards, we start with the creation of a "classic" procedure.

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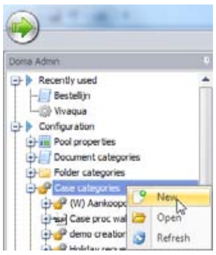
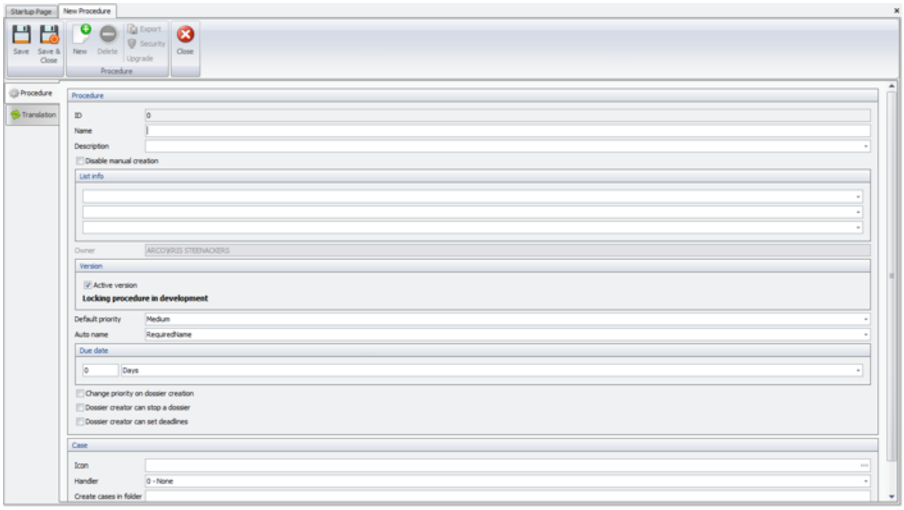
2.3.3 Create a new procedure

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*.



2.3.4 Basic configuration

1. Enter the name **Holiday Request Student [Your number]** 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.

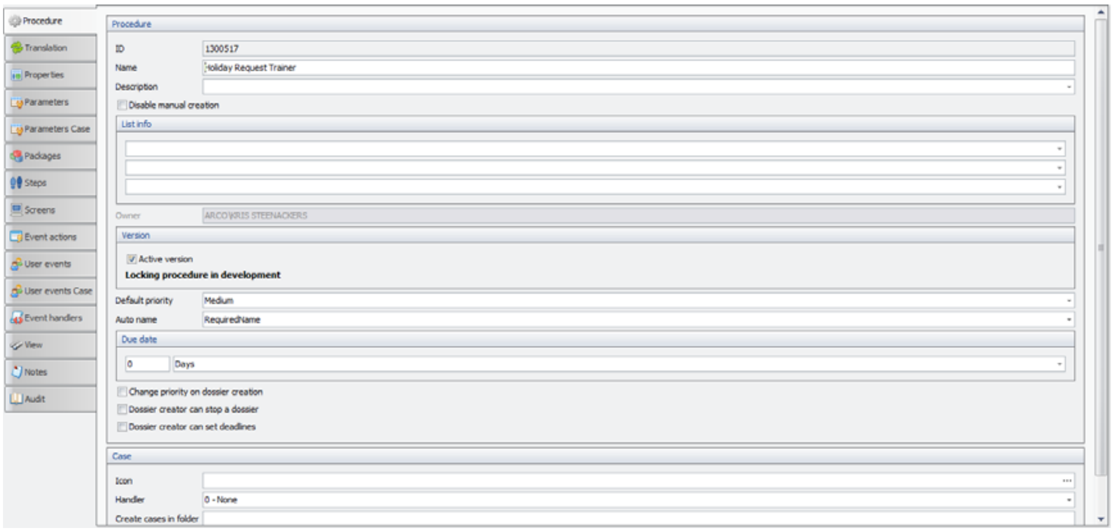
3. In the part *Version*, you can see that this is the active version of your procedure and that the procedure is ***Locking in development***. As long as the procedure is in development, it will only be available for application administrators and it will be hidden for normal users.

Procedures in development

- Are only visible for administrators in the web interface
- Each step of the procedure is assigned to the same 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 have entered in the field *Name* of the tab *Procedure*.

5. When we save our procedure, another 8 tabs appear in the procedure configuration tab and some extra toolbar items become enabled.

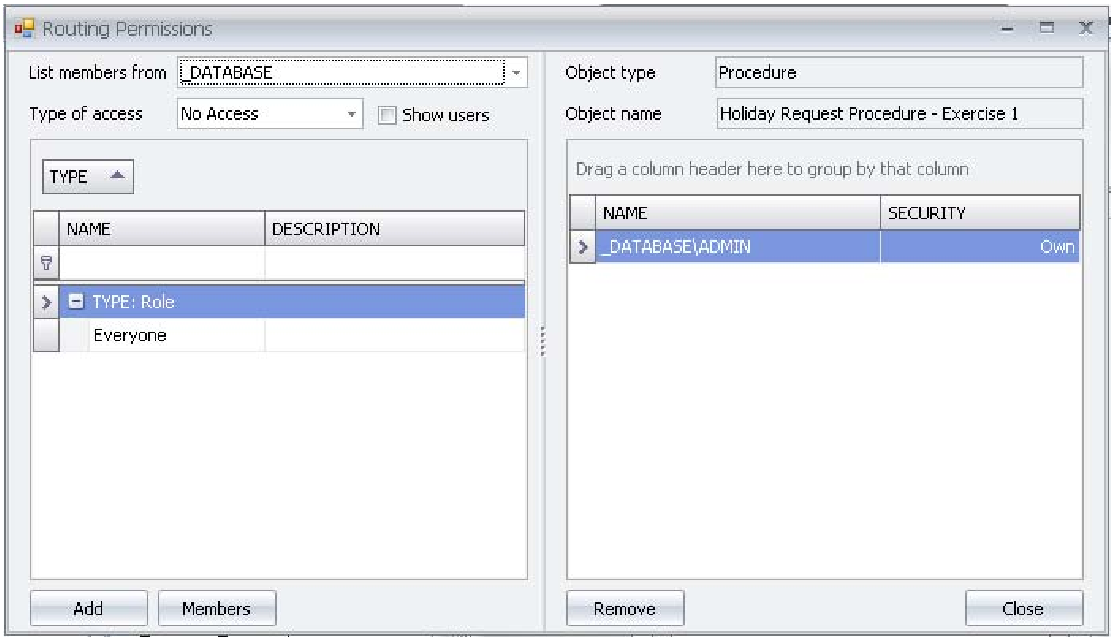


2.3.5 Set procedure security

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 trainer:
5. Do the next steps to configure the security:

    1. List members from: Select EDUCATION
    2. Type of access: Full Control.
    3. Select the checkbox Show users.
    4. In the list below this fields, select the user Trainer (by scrolling or by using the filter)
    5. Then click on the button Add under the list.
    6. The user Education/Trainer 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 Trainer and your user are allowed to work on this procedure. Other users don't see it in the Routing WebInterface.

2.3.6 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 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 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.

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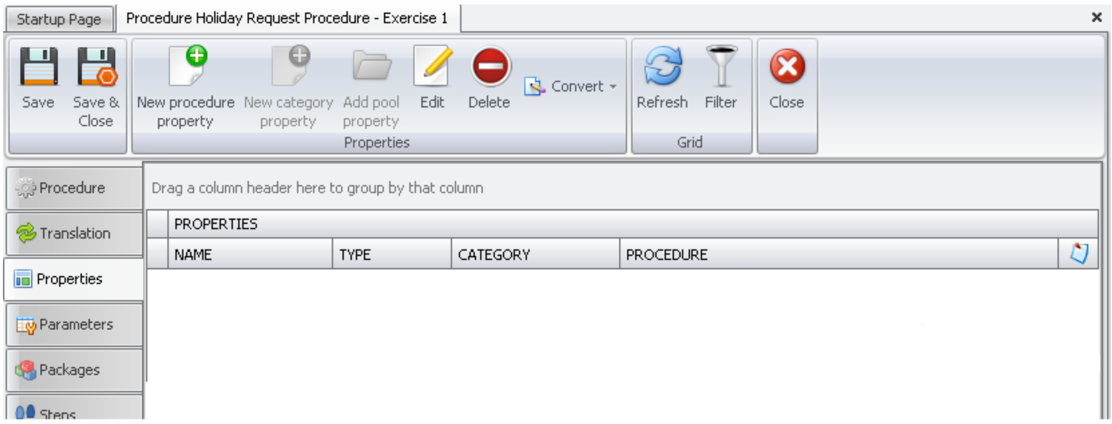
1. First select the tab ***properties***:



From here, you can:

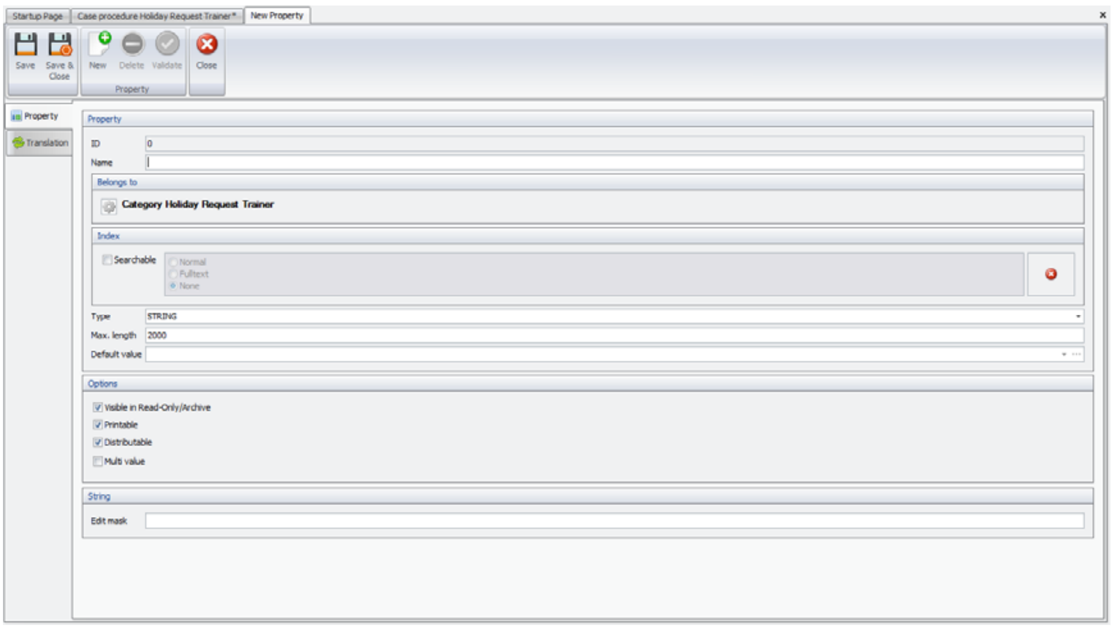
- Create new procedure properties.

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

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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

2.3.7 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.

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   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.

2.3.8 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.

2.3.9 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.

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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.

2.3.10 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).

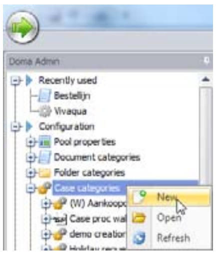
1. Select _DATABASE in the field *List members from*.
2. Select _CASE_CREATOR in the user list at the right.
3. Click on the button Add.
4. The user will now appear in the step security list at the right.
5. Click on the ***Close*** button.
6. The step is now assigned to the user who has started the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

If we want to keep the results of the holiday request in the DocRoom folder of the employee, we choose to create a *Case Category*.

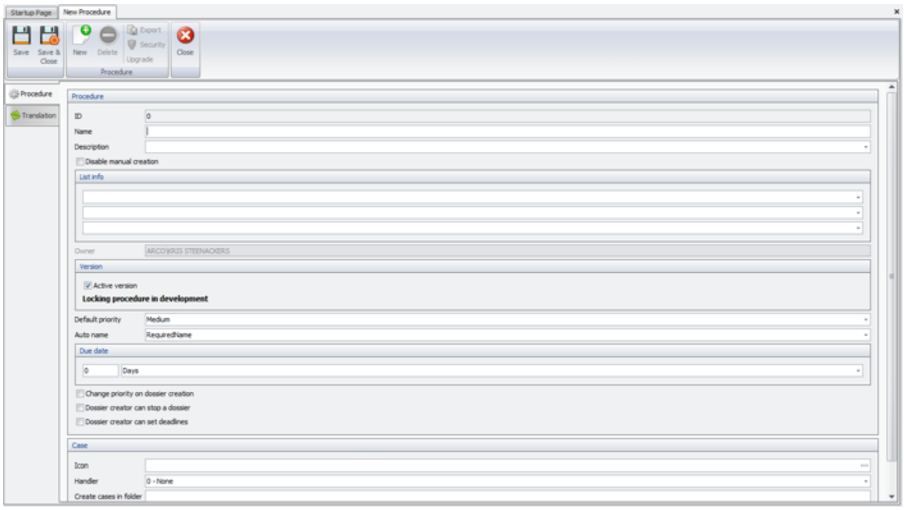
2.4 Exercise 2: Create a new case category

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 **Case 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 Procedure* now appears. This tab itself consists initially out of 2 tabs: *Procedure* and *translation*.



2.4.1 Basic configuration

1. Enter the name **Holiday Request Student [Your number]** 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.

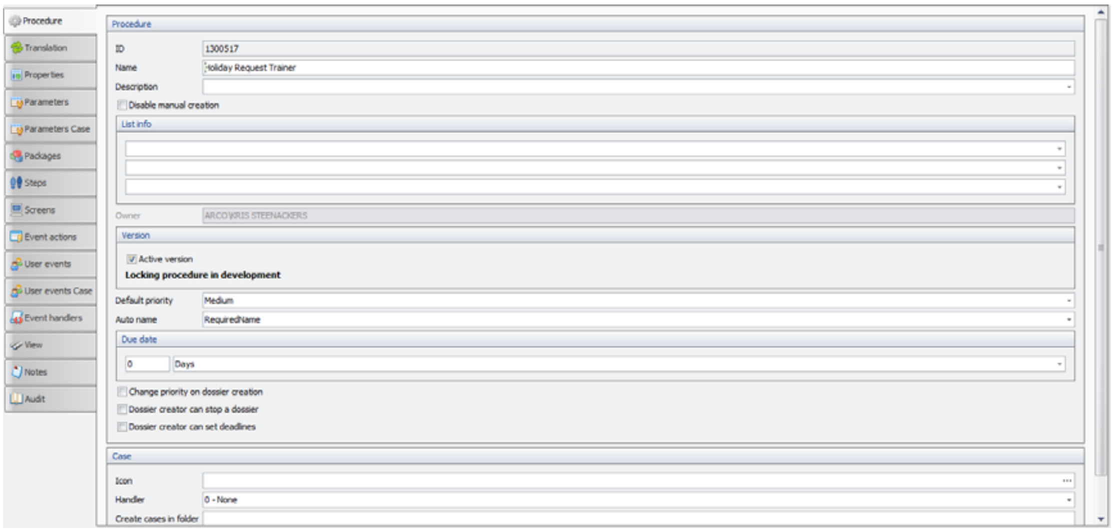
3. In the part *Version*, you can see that this is the active version of your procedure and that the procedure is ***Locking in development***. As long as the procedure is in development, it will only be available for application administrators and it will be hidden for normal users.

Procedures in development

- Are only visible for administrators in the web interface
- Each step of the procedure is assigned to the same 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 have entered in the field *Name* of the tab *Procedure*.

5. When we save our procedure, another 8 tabs appear in the procedure configuration tab and some extra toolbar items become enabled. One of them is the item ***Security***.



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2.4.2 Set case category security

Now we will define the case category security:

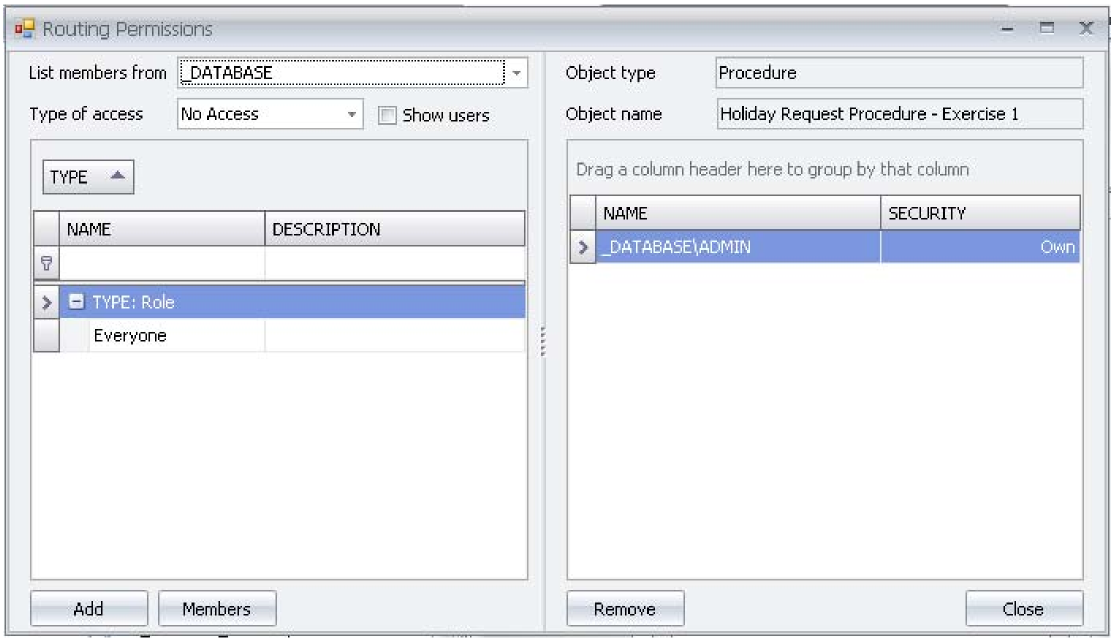
6. Make sure that the tab *Procedure* is selected.

7. Click on the button 

in the toolbar.

8. 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.



9. First, we will grant full control rights on the category to the trainer:

10. Do the next steps to configure the security:

    7. List members from: Select EDUCATION
    8. Type of access: Full Control.
    9. Select the checkbox Show users.
    10. In the list below this fields, select the user Trainer (by scrolling or by using the filter)
    11. Then click on the button Add under the list.
    12. The user Education/Trainer 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 them in the list and click on the button Remove below.

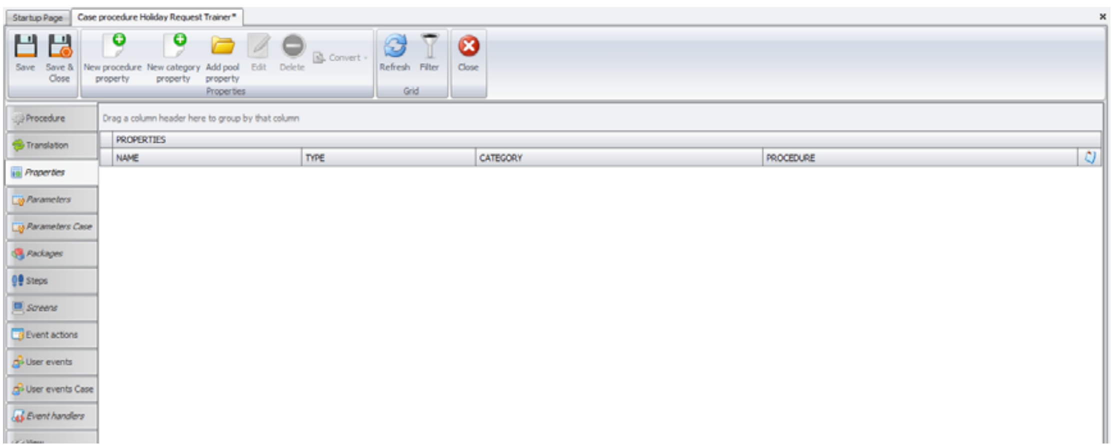
11. Close the window after this configuration.

2.4.3 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, an 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.

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



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From here, you can:

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

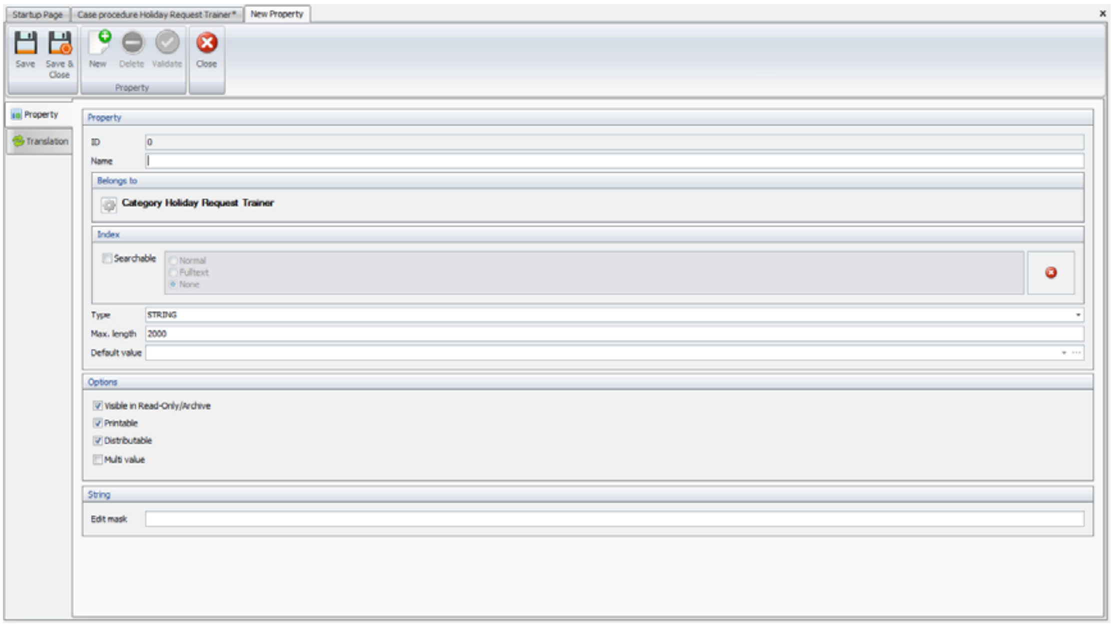
All properties of the case category will be shown in this tab.
They will be available in each step of the procedure, next to other, more general properties.

8. Create the first category property:

Click on the button 

in the toolbar.

A new tab with the name New Property appears:



9. 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

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

11. 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.

12. 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

2.4.4 Create steps

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

5. 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.

6. **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.

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

8. **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.

2.4.5 Step configuration

Now we can configure each step.

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

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

7. 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.

8. 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.

2.4.6 Define step lay-out

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

5. 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.

6. 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

7. 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.

8. Keep the default Screen actions configuration.

2.4.7 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).

7. Select _DATABASE in the field *List members from*.

8. Select _CASE_CREATOR in the user list at the right.

9. Click on the button Add.

10. The user will now appear in the step security list at the right.

11. Click on the ***Close*** button.

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

13. 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

14. Put procedure in production.

The first version of our procedure is now created. Try it out in the webinterface.

- Can you start the procedures of the other users?
- You can start a procedure and a Case Category from a folder in the DocRoom tree. But what happens when both are started? There is a substantial difference between both items!
- Also when the procedure has ended and the Case Category has ended, there is a difference: which can be found in DocRoom?

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2.5 Exercise 3: Refinement of the procedure “Holiday Request”

In this exercise, we will add / configure the next items:

- Creation of an automatic dossier name

  →the user won’t have to enter a dossier name when starting the procedure

- Define a few event actions:
  - Rename the case
  - Auto complete the property *Requested by* with the name of the user who started the dossier.
  - Add an extra property *Reason* which will only appear when the request is rejected.
  - Add an automatic notification that could replace the third step of the procedure. This notification will automatically be send to the dossier starter after release of the second step.

- Define a validation script:
  - Add a javascript that checks whether the date entered in the property *Start date* < the date entered in the property *End date*.

2.5.1 Creation of an automatic dossier name and rename case

First define that we will use a GUI ID instead of a manual insert by the dossier starter:

1. Open the Doma admin client module.
2. Open the Holiday request Procedure.
3. Select the **tab Procedure**. (should be selected by default)
4. Set the **property Auto name** to **GUIDName.**

Then rename the dossier:

5. Select the **tab View**.
6. Double click on the step icon of the first step (**1) Request**).
7. The configuration tab for this step appears.
8. Select the **Event actions**.
9. Click on the button **New action** in the toolbar.
10. A pop-up window appears. Click on the **+** icon next to **CATEGORY: General**.
11. Select **Rename** in the items that appear.
12. Rename the dossier name to **holiday request**.

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2.5.2 Auto complete the property Requested by

1. Open the Doma admin client module.
2. Open the Holiday request Procedure.
3. Select the **tab View**.
4. Double click on the step icon of the first step (**1) Request**).
5. The configuration tab for this step appears.
6. Select the tab **Event actions**.
7. Click on the button **New action** in the toolbar.
8. A pop-up window appears. Click on the **+** icon next to **CATEGORY: Properties**.
9. Select **Set Property** in the items that appear: click on the row of the item, then click on the button **Select** in the right lower corner.
10. A configuration table appears.
11. Select the property ***Requested by*** in the dropdown list **Property**.
12. Enter the next value: **#USER_STARTER#** in the row below.
13. Save.
14. Select the tab **Screen items**.
15. Change the **mode** of the property ***Requested by*** from *ItemMandatory* to **ItemReadOnly**.
16. Save and close the step configuration window.

2.5.3 Show property Reason when request is rejected

We want the property **Reason** only to appear if the holiday request is rejected. And then it has to be completed mandatory, otherwise the user cannot release the step.

To make this possible:

- We create an extra property *Reason* that will be put mandatory in the step screen.

Type	Name	Mode
ObjectProperty	Reason	ItemMandatory

- We **hide** this **field On Entry** by using an Event Action.
- We **show** this field **On Keep** if **Approved?=No** by using an Event Action.
- We **hide** this **field On Keep** if **Approved?=Yes** by using an Event Action.

Hide the field Reason On Entry

1. Select the tab **Event actions**.
2. Click on the button **New action** in the toolbar.
3. A pop-up window appears. Click on the **+** icon next to **CATEGORY: Properties**.
4. Select **Hide Property** in the items that appear: click on the row of the item, then click on the button **Select** in the right lower corner.
5. A configuration table appears.
6. Select the **EVENT WF_Entry**.
7. Select the property ***Reason*** in the dropdown list **Property**.
8. Save.

Show the field Reason On Keep if Approved=No

1. Select the tab **Event actions**.
2. Click on the button **New action** in the toolbar.
3. A pop-up window appears. Click on the **+** icon next to **CATEGORY: Properties**.
4. Select **Show Property** in the items that appear: click on the row of the item, then click on the button **Select** in the right lower corner.
5. A configuration table appears.
6. Select the **EVENT WF_Keep**.
7. Select the property ***Reason*** in the dropdown list **Property**.
8. Select the field **Condition**. Click on the **+ icon** in the field.
9. A window with the message ***Please enter a name for the event condition*** appears. Enter ***Approved=No*** as the name for the condition. Click on the **OK** button.
10. A window **Condition** appear.
11. Click on the icon in the window: the next condition **[Approved?] Equals <enter a value>** appears.
12. Click on **<enter a value>** and select **False.**
13. Click on the **Save** button and close the window.
14. Keep ***Approved=No*** as a condition for this action.
15. Click on the **Save** button in the toolbar.

Hide the field Reason On Keep if Approved=Yes

1. Select the tab **Event actions**.
2. Click on the button **New action** in the toolbar.
3. A pop-up window appears. Click on the **+** icon next to **CATEGORY: Properties**.
4. Select **Hide Property** in the items that appear: click on the row of the item, then click on the button **Select** in the right lower corner.
5. A configuration table appears.
6. Select the **EVENT WF_Keep**.
7. Select the property ***Reason*** in the dropdown list **Property**.
8. Select the field **Condition**. Click on the **+ icon** in the field.
9. A window with the message ***Please enter a name for the event condition*** appears. Enter ***Approved=Yes*** as the name for the condition. Click on the **OK** button.
10. A window **Condition** appear.
11. Click on the icon in the window: the next condition **[Approved?] Equals <enter a value>** appears.
12. Click on **<enter a value>** and select **True.**
13. Click on the **Save** button and close the window.
14. Keep ***Approved=Yes*** as a condition for this action.
15. Click on the **Save** button in the toolbar.

2.5.4 Automatic e-mail notification at the end of the procedure

Instead of giving feedback in a third step that has to be released by the user, we want to send a message to the requester. To make this possible:

- We **create** a **notification template** that we will use to pre-define the message.
- We will **send** the mail **On Exit** by using an Event Action.

Create the notification template:

1. Select the item Notification templates in the configuration part of the navigation tree in the Doma admin module.
2. Click on the right mouse button: a menu appears.
3. Select the option **New**.
4. A new configuration tab with the name **New Notification template** appears.

5. Configure the template:
    a. Tab Notification template:
        i. Name= **feedback holiday request Student[your number]**
        ii. Description: [empty]
        iii. Attachments: [empty]
        iv. Options: select **Send notification** and **Archive**.
        v. Custom handler: [empty]
    b. Tab Content default:
        i. Subject = #CASE_NAME#
        ii. Tab fixed body: insert the next message:

Hi, this is an automatically generated feedback message for your holiday request with the next details: #CASE_NAME# Start date: [@Start date@] End date:[@End date@] Approved? [@Approved?@] Reason: [@Reason@] Kind regards

        iii. Click on the Save & Close button.

Now create an event action to send the message:

1. Select the tab **Event actions**.
2. Click on the button **New action** in the toolbar.
3. A pop-up window appears. Click on the **+** icon next to **CATEGORY: Notifications**.
4. Select **Send notification to the case creator** in the items that appear: click on the row of the item, then click on the button **Select** in the right lower corner.
5. A configuration table appears.
6. Select the **EVENT WF_Exit**.
7. Select the notification template **feedback holiday request Student[your number] in the dropdown list** ***Notification Template***.
8. Save & close the configuration tab.

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2.6 Exercise 4: Add a conditional step to the procedure Holiday Request

We expand the procedure Holiday Request with a conditional step.
Depending upon the value of the condition, the procedure will be processed to one of the 2 steps that follow the conditional step.

2.6.1 Create the conditional step

1. Select the tab ***View***. You see the procedure steps and an overview of all step types in a frame at the right side of the window. Select CONDITION in the steps overview. When you now create a new step, it will be a step of the type CONDITION.

2. **Create the 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. Above the step icon you have created, the Condition window will now pop-up.

   e. Define your condition:

      i. Click on the icon in the window: the next condition **[Approved?] Equals <enter a value>** appears.
      ii. Click on **<enter a value>** and select **True.**
      iii. Click on the **Save** button and close the window.
      iv. Keep ***Approved=Yes*** as a condition for this action.
      v. Click on the **Save** button in the toolbar and close the window.
      vi. The condition is now visible in the step icon.

2.6.2 Connect the steps

1. Delete the arrow from the step *2) Decission* to step *3) Feedback*: select it and press the Delete key on the keyboard.

2. Now draw an arrow from step *2) Decission* to the conditional step.

3. Draw an arrow from the conditional step to step *3) Feedback*. It will automatically turn green and has the value *Yes*.

4. Draw a second arrow from the conditional step to step *1) Request*. . It will automatically turn red and has the value *No*.

5. Save and close.

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2.7 Exercise 5: Add a distribution step to the procedure Holiday Request

Again, we expand the procedure Holiday Request.
When we use a condition in a flow, we can only go one way or another. We now expand our procedure with a distribution step. This step allows us to go in more than 2 directions. Along with this step, we create some extra steps so the procedure can either go one way or another.

Since this procedure becomes more than only a Holiday request, we will also rename it to Absence.

2.7.1 Rename the procedure

1. Select the procedure tab.
2. Change the Name from **Holiday Request Student [your number]** to **Absence Student [your number]**.

2.7.2 Create the step Registration of Absence

1. Step Type: NORMAL
2. Step name: Registration of Absence
3. Put the step right behind the start step.
4. Create an extra property for the step:

Name	Type	Values
Type of absence	List	Holiday, illness, special occasion

5. Step configuration
   a. Default executors: Case creator
   b. Screen items:
      i. Procedure name, Dossier Name, Step Name in Read only.
      ii. Type of absence Mandatory.

2.7.3 Create the distribution step

1. Select the tab ***View***. You see the procedure steps and an overview of all step types in a frame at the right side of the window. Select DISTRIBUTION in the steps overview. When you now create a new step, it will be a step of the type DISTRIBUTION.
2. **Create the distribution step**
   a. Put the cursor in the white background.

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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. The step name ***Distribution*** is suggested in this window. Click on the OK button. The name will appear in the step icon.

f. Delete the arrow between the first and the second step.

g. Connect the steps:

   a. Connect the step Registration of Absence to the distribution step.

   b. Connect the distribution step to step 1) Request. The arrow will automatically turn red and gets the value *Default*.

2.7.4 Create the step Special occasion

1. Step Type: NORMAL
2. Step name: Special Occasion
3. Put the step under the distribution step.
4. Create an extra property for the step:

Name	Type	Values
Type of special occasion	List	Marriage, Birth, Adoption, Decease

5. Step configuration
   a. Default executors: Case creator
   b. Screen items:
      i. Procedure name, Dossier Name, Step Name in Read, Type of absence: Read only.
      ii. Type of special occasion: Mandatory.
6. Draw an arrow from the distribution step to this step. The arrow will automatically turn red and gets the value *Default*.
7. Select this arrow and click on the right mouse button: a menu appears: select ***Condition***.
8. Define your condition:
   a. Click on the icon in the window: the next condition **[Approved?] Equals <enter a value>** appears.
   b. Click on **[Approved?]** and change it into ***Type of absence***.
   c. Click on **<enter a value>** and select ***Special occasion*.**
   d. Click on the **Save** button and close the window.
   e. The condition is now visible on the arrow.

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2.7.5 Create the step Stop

1. Step Type: STOP
2. Step name: STOP
3. Draw an arrow from the step Special Occasion to this step.
4. Save & Close.

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