




**BNP PARIBAS**  
**SECURITIES SERVICES**

## Workflow Manager

Gabriel Freire 2015




**BNP PARIBAS**  
**SECURITIES SERVICES**

Workflow Manager  
Version 1.0

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Password

Powered by:  
 **SQLite**

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# Introduction

WorkFlow Manager is a java application that ensures enables users in a local network to keep track of multiple tasks. Each of these tasks may hold multiple files and can be verified by the assigned manager(s) and everything is logged into a file, facilitating the auditing process, when needed.

The screenshot shows a web-based application window titled "WorkFlow Manager". The interface includes a "Task List" section on the left with a "Refresh!" button and a "Task Menu" dropdown. The dropdown menu is open, showing a list of tasks: "Plugin Internship - Gabriel FREIRE", "Financing - Gabriel FREIRE" (highlighted), "SubTask - MARCH - Gabriel FREIRE", "SubTask - DECEMBER - Gabriel FREIRE", "SubTask - SEPTEMBER - Gabriel FREIRE", and "SubTask - JUNE - Gabriel FREIRE". The main content area displays details for the selected "Financing" task. It includes a "Task Name" field with the value "Financing", an "Author" field with "maslor", and a "Created on" timestamp of "2015/09/02 10:32:05". Below these, there are fields for "Assignee" (maslor), "Last Editor" (maslor), and "Last Edited on" (2015/09/02 10:32:05). The "Status" is "ONGOING" in red, and "Verification" is "Unverified" in red. There are also fields for "Completed on:" and "Verified on:". A "Task Description" field contains the text "Test". At the bottom of the task details, there are "File List" and "Upload File" buttons, and checkboxes for "Finished" and "Verified". A "Comment:" field is located at the bottom, with a "Post!" button to its right. A "Logout" button is located in the top right corner of the application window.

This document has two parts: Using the application and setting up the application.

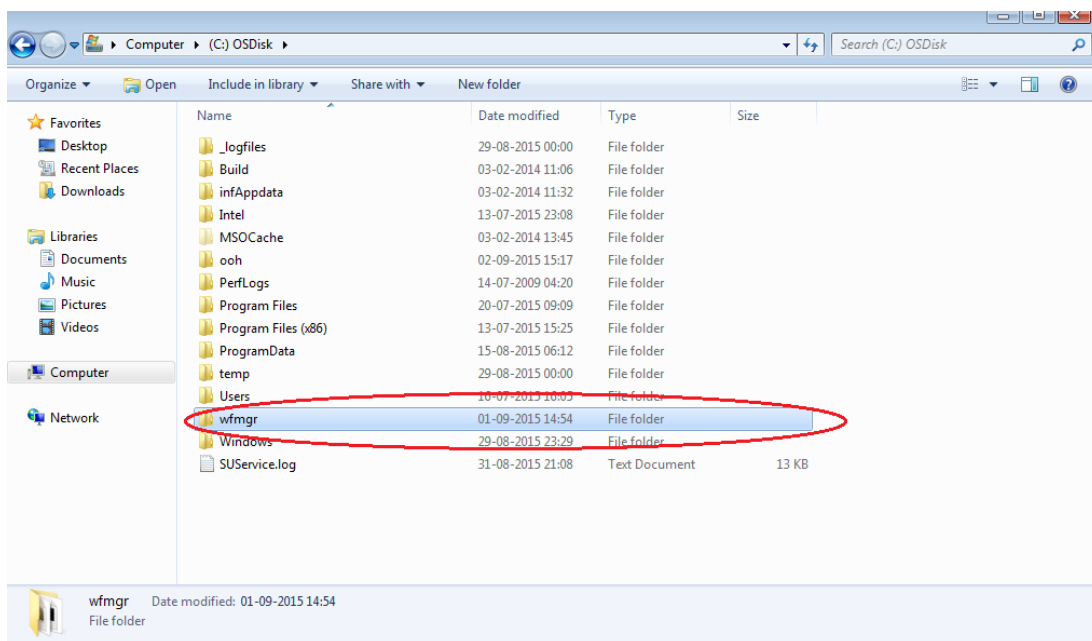
This application was developed by Gabriel Freire in the context of the Plugin Internship 2015 (July-September) for the Finance department under the supervision of Bruno Lousa, the designated tutor.

# Setting Up the Application

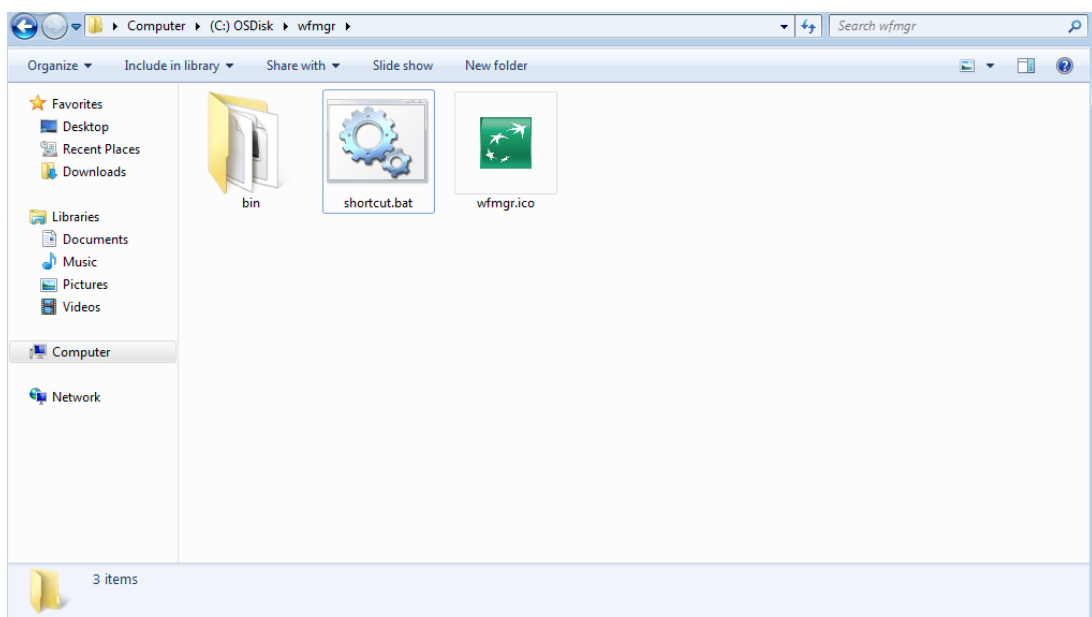
Setting up the application on a Windows environment is quite simple. Just follow the steps as listed in the IT or regular user instructions, depending on your needs. If you wish to improve the application, check the developer's instructions.

## Regular User Instructions:

1 – Go to the shared folder designated for the application's usage. You'll find a folder like this:

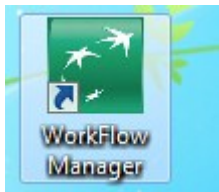


2 – Enter the folder, and you'll find something like this:



3 – Double-click shortcut.bat.

4 – Now you'll have a shortcut in your Desktop! Something like this:

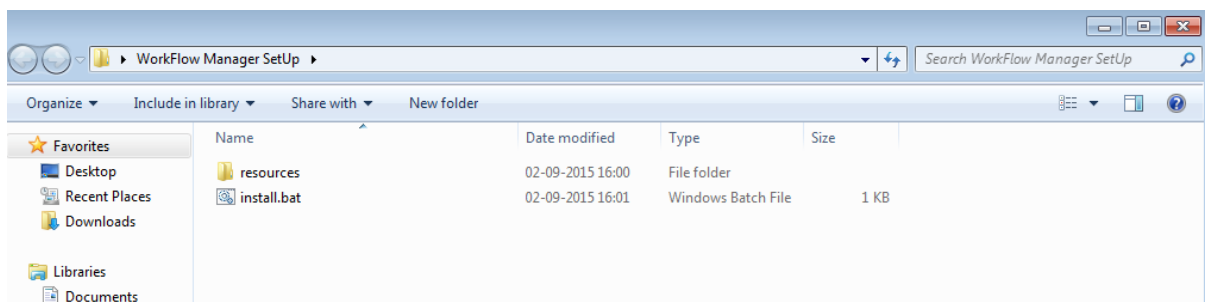


## IT Instruction:

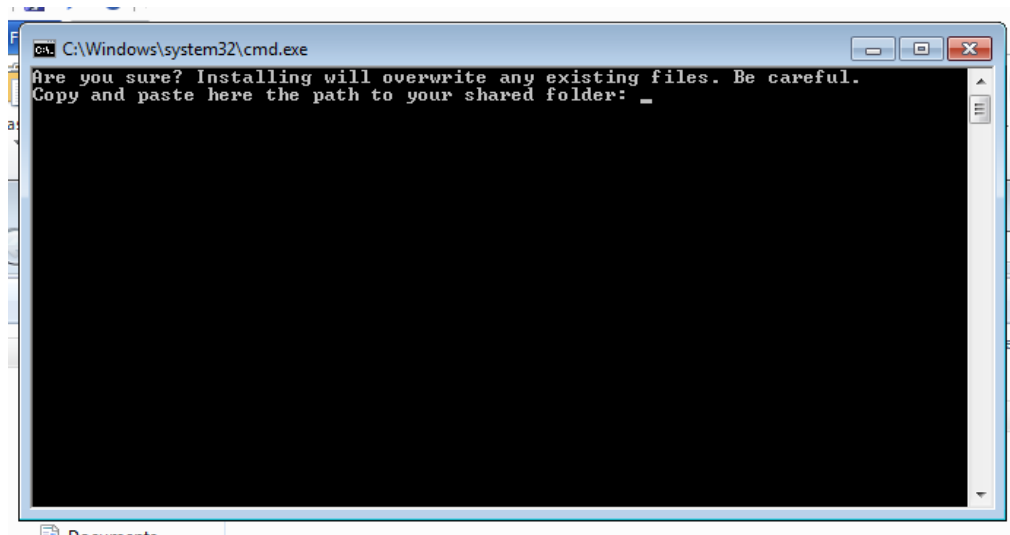
1 – If you just want to setup the application, use the setup folder:

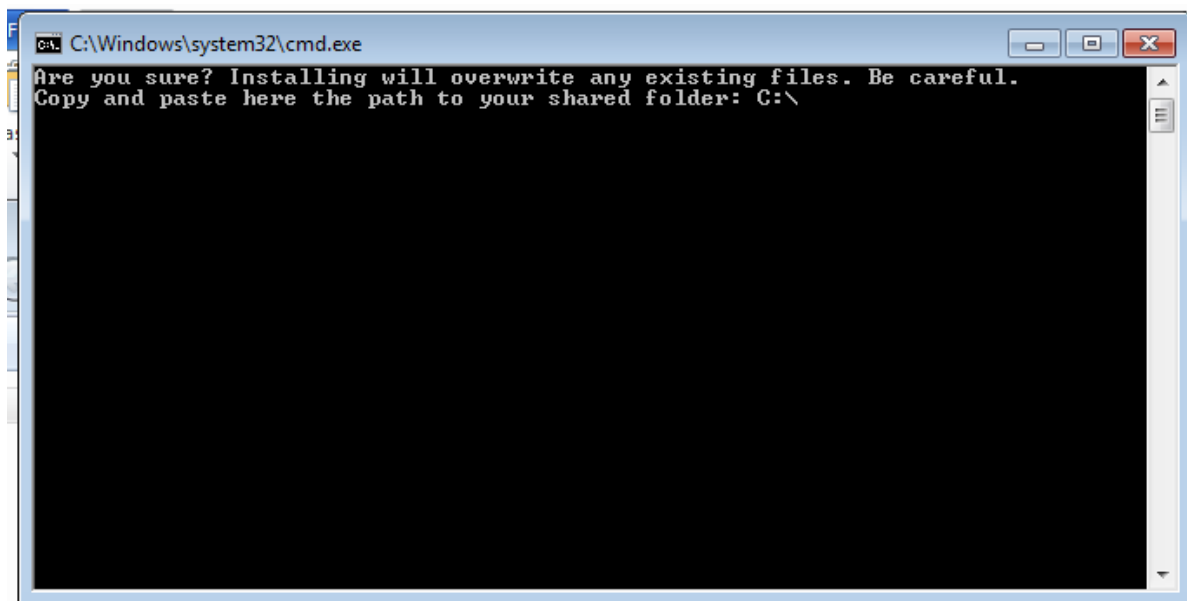


2 – Inside, you'll find these contents. Double-click the install.bat :



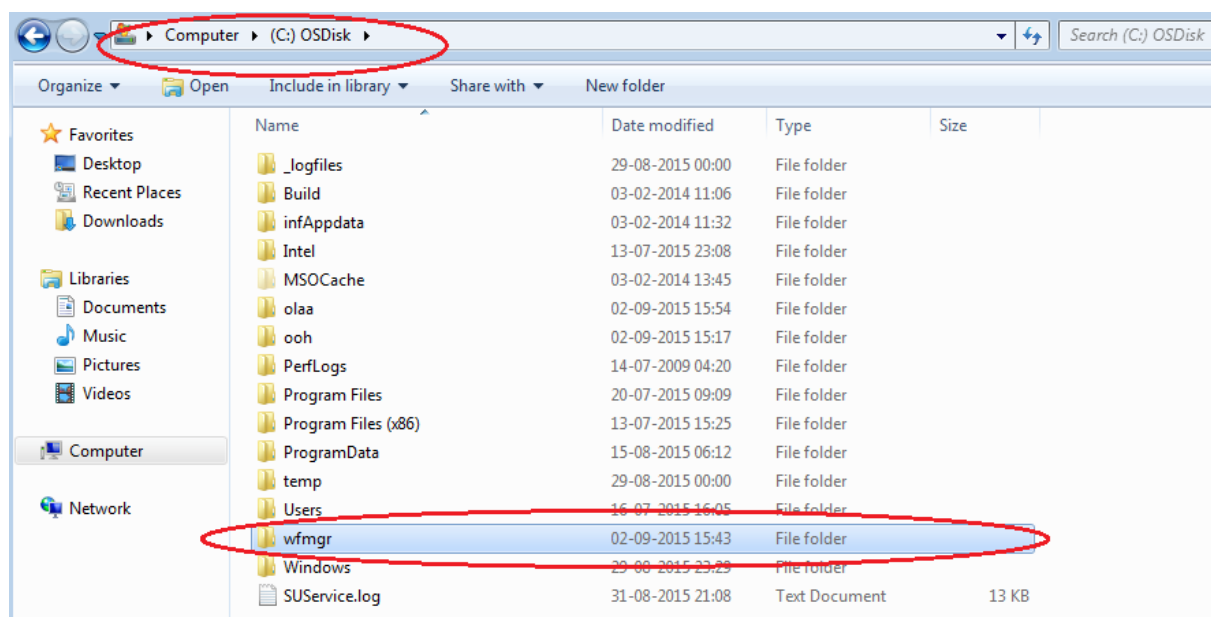
3 – There is going to appear a terminal window asking for input. Paste or insert the desired shared folder path:



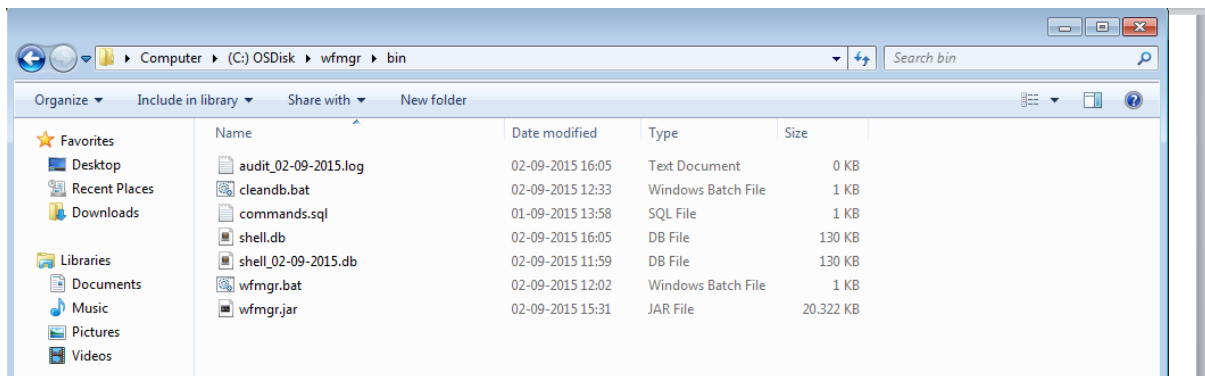
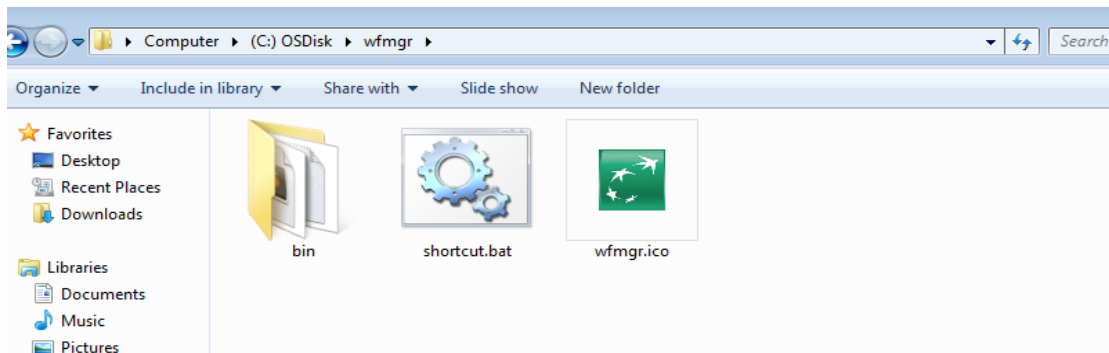


Notice that I've chosen the 'C:\' path.

4 – Go to the chosen path and you'll find that a new 'wfmgr' folder's been created:



5 – Check if the contents are the same as these:



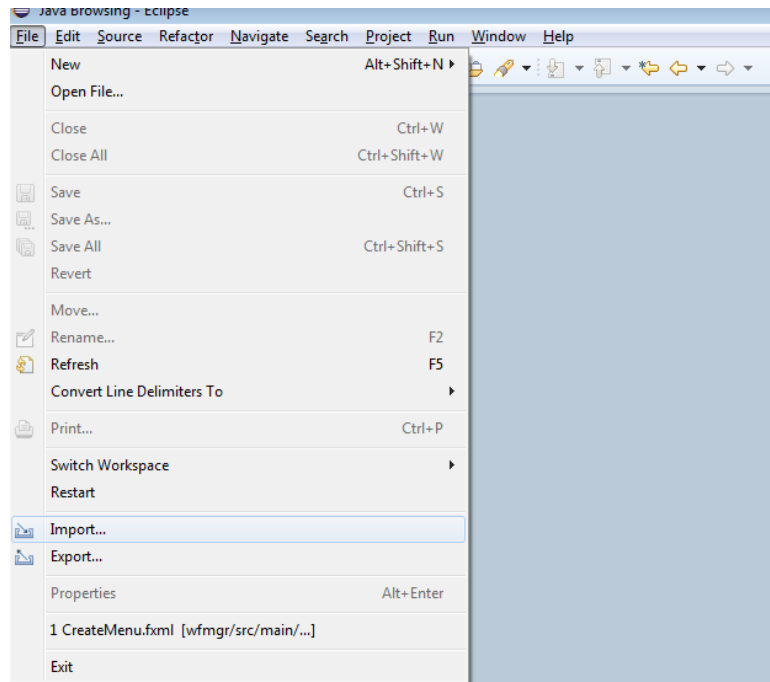
6 – From here, you're set up. For instructions on how to run it, refer to the regular user instructions above.

## Developer's Guide:

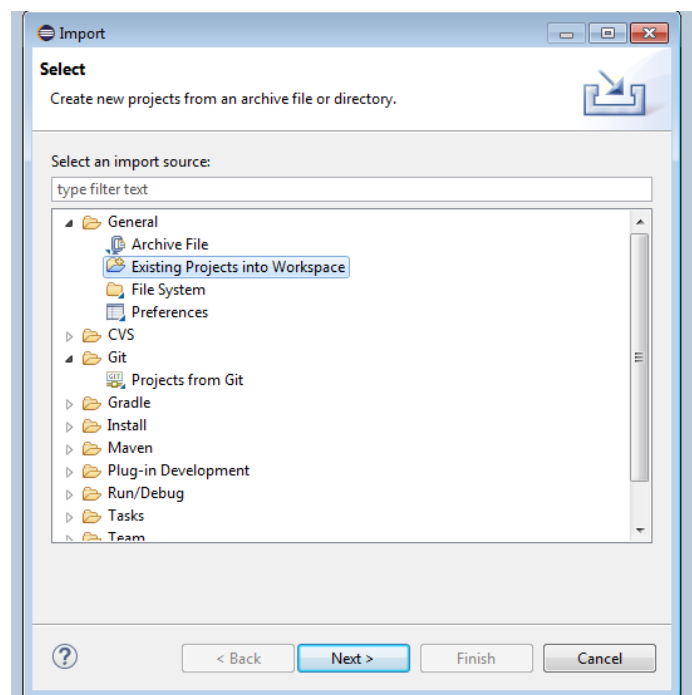
### Eclipse:

For those using eclipse, just follow the standard steps to import the project.

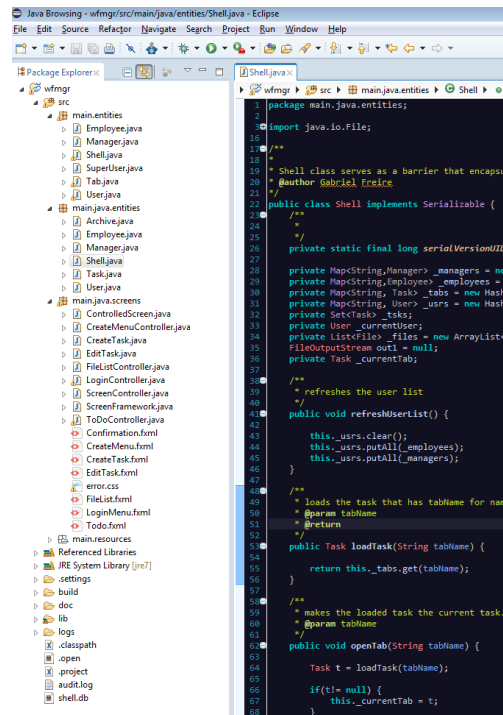
1 – Select import as described in the picture:



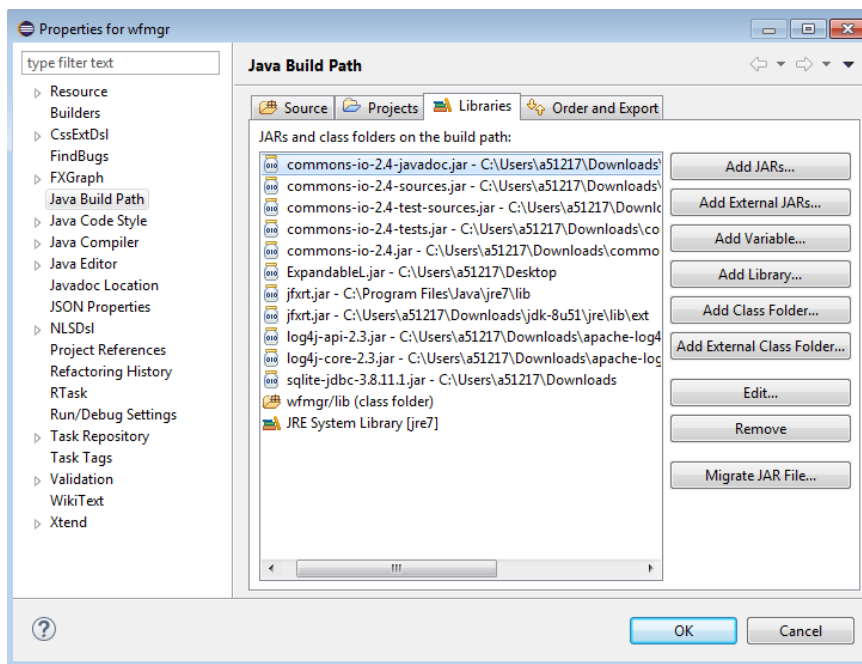
2 – Import it as “Existing Project into Workspace” as described:



3 – Eclipse will set up the project and you're ready to change the code!

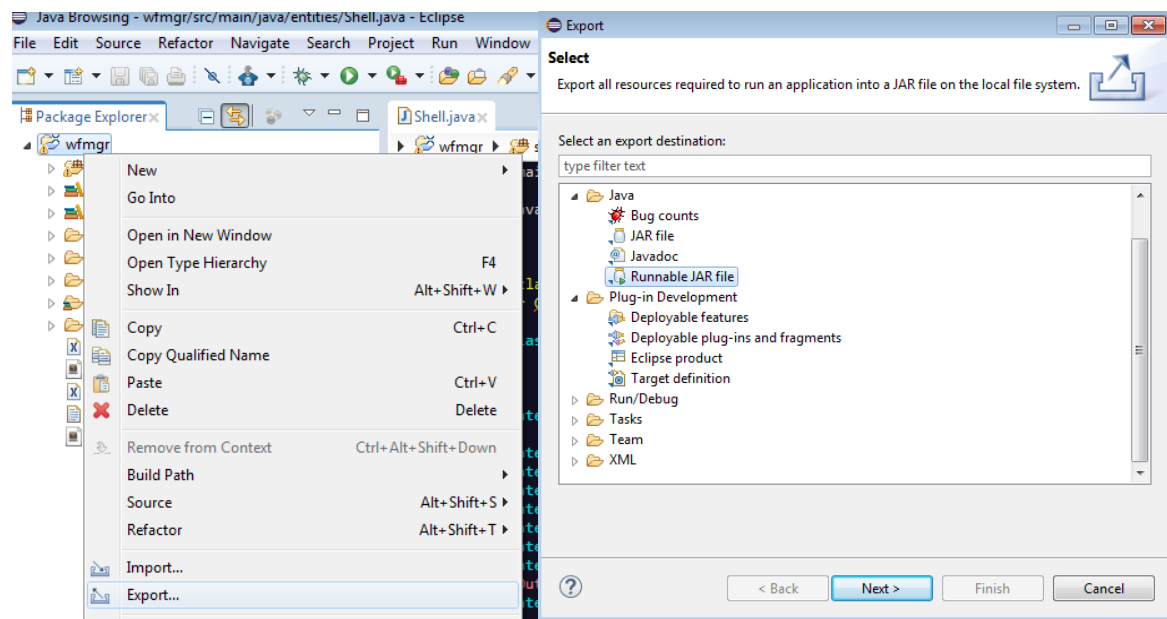


4 – Remember to change the build path according to the machine you're using:



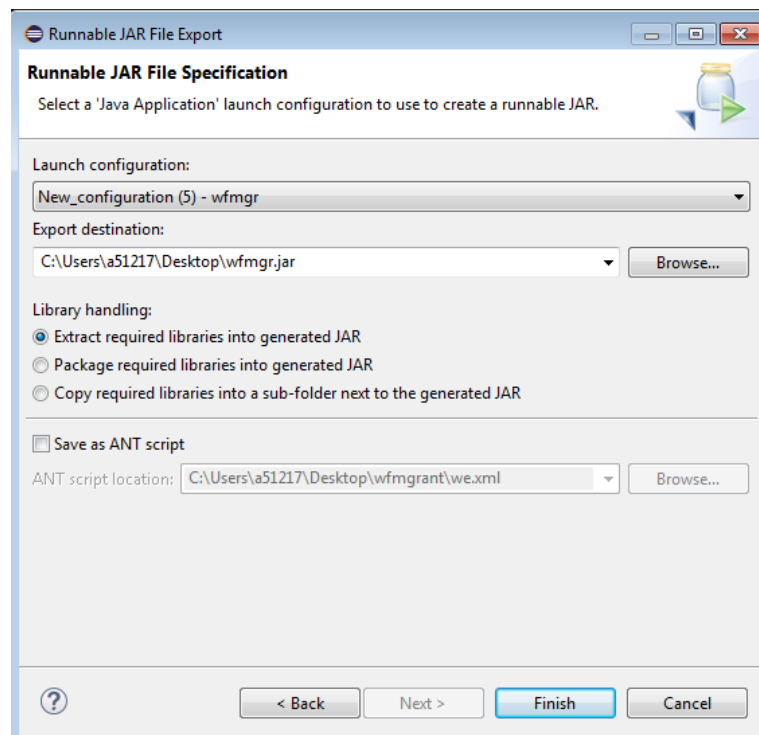


5 – When exporting the application in eclipse, don't forget to check it as a "Runnable Jar" otherwise it won't run when double-clicked:



7 – The launch configuration should be the one you've been using to run the project.

*Note: Sometimes it will say it's failed to build the jar, just repeat it and it will work. It's just that the eclipse information wasn't refreshed in the meantime.*



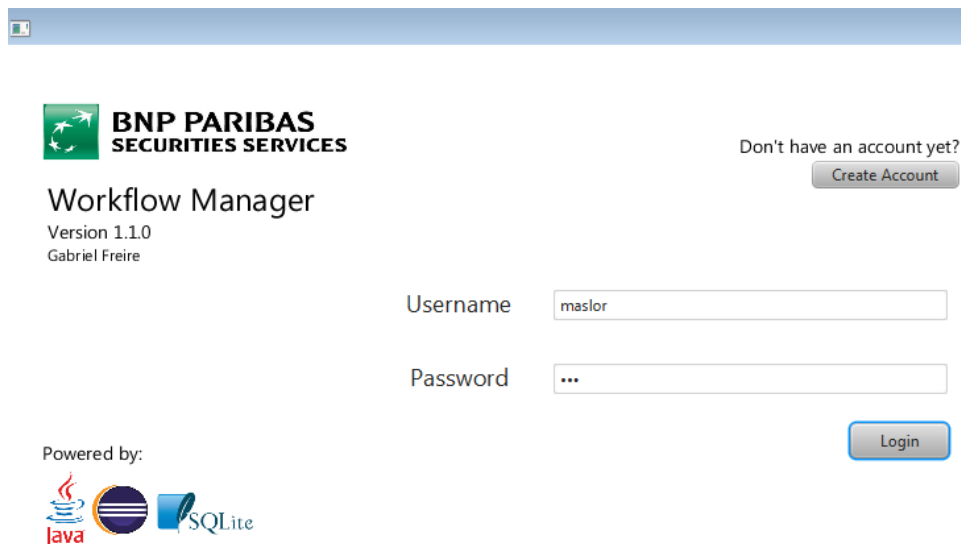
## Using the Application

1 – Start by double-clicking the shortcut you have on your desktop (*if you don't have one, check the setting up instructions above. If still in doubt, contact your IT*).



2 – When the login screen appears, either login or create na account (if you haven't created one yet) and login.

i) Login:

The login screen for Workflow Manager. It features the BNP Paribas Securities Services logo and the text 'Workflow Manager Version 1.1.0 Gabriel Freire'. There are input fields for 'Username' (containing 'maslor') and 'Password' (containing '...'). A 'Login' button is at the bottom right. A 'Create Account' button is at the top right, with the text 'Don't have an account yet?' above it. At the bottom left, it says 'Powered by:' followed by logos for Java, a circular logo, and SQLite.

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Workflow Manager  
Version 1.1.0  
Gabriel Freire

Don't have an account yet?  
Create Account

Username: maslor

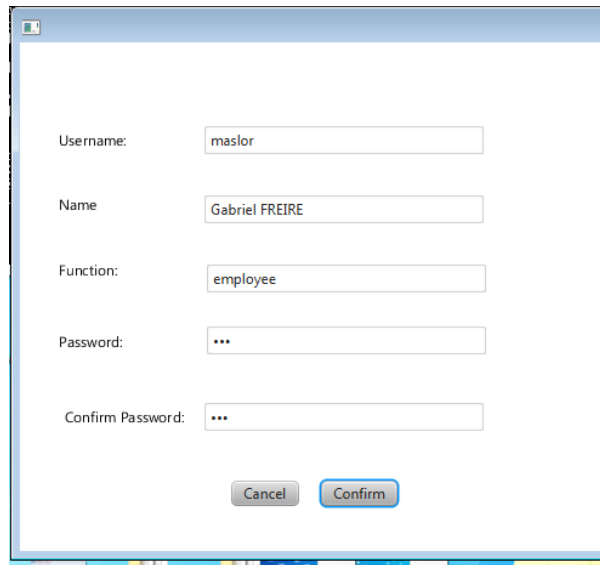
Password: ...

Login

Powered by:  
Java [Circular Logo] SQLite

*Write your username, password and click the 'Login' button.*

ii) Create an Account

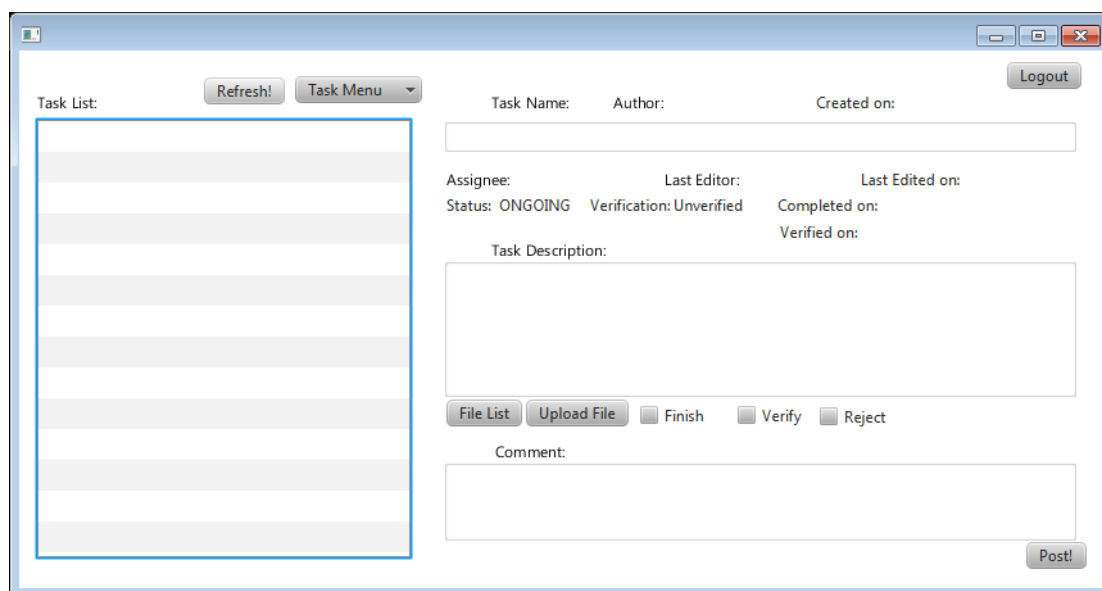


A screenshot of a web application window titled "Create an Account". The form contains the following fields and controls:

- Username:** A text input field containing the value "maslor".
- Name:** A text input field containing the value "Gabriel FREIRE".
- Function:** A text input field containing the value "employee".
- Password:** A password input field with three dots indicating masked text.
- Confirm Password:** A password input field with three dots indicating masked text.
- Buttons:** At the bottom, there are two buttons: "Cancel" and "Confirm". The "Confirm" button is highlighted with a blue border.

3 – In the main application menu, one of the most importante features is provided by the “Refresh!” button since it refreshes the list and keeps each user connected to the database updated in terms of self and other users’ actions.

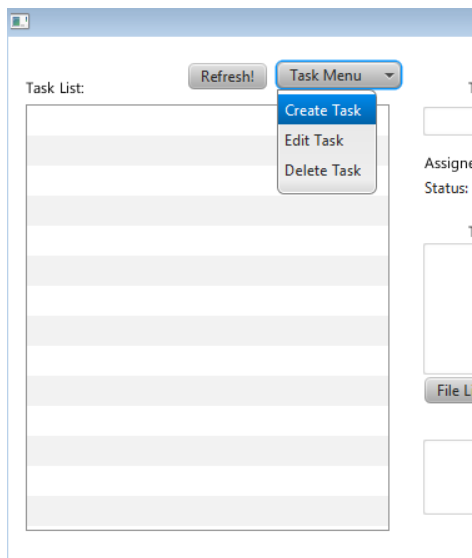
**Everytime you perform an action and before you do, you should click refresh** to be sure you are working in the most updated version of the database.



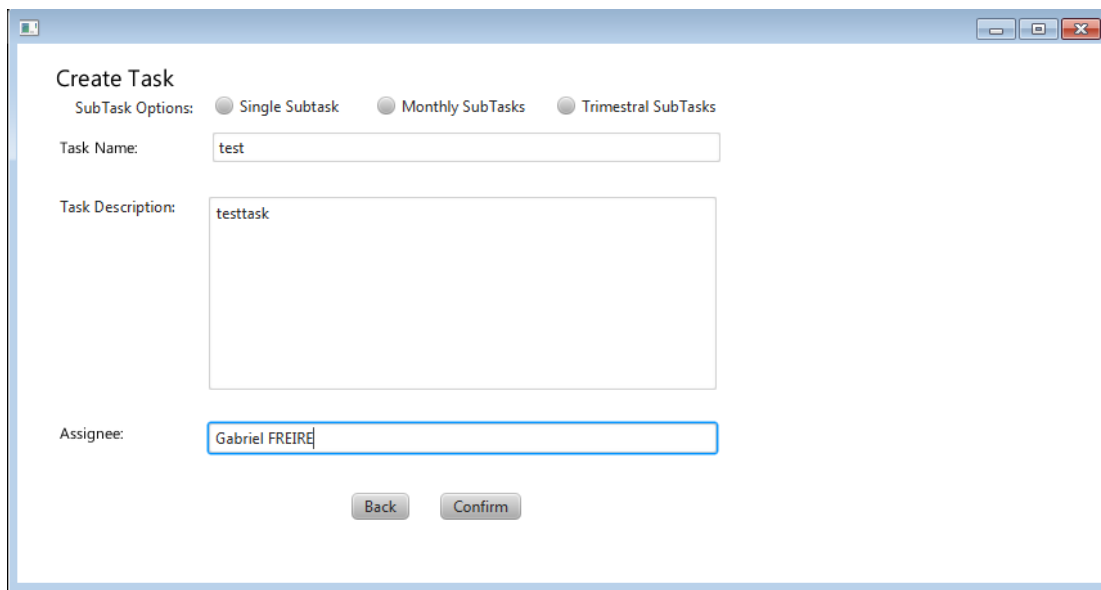
A screenshot of the main application menu. The interface includes a "Task List" on the left, a "Refresh!" button, and a "Task Menu" dropdown. The right side contains a form for task management with the following elements:

- Task Name:** A text input field.
- Author:** A text input field.
- Created on:** A text input field.
- Assignee:** A text input field.
- Last Editor:** A text input field.
- Last Edited on:** A text input field.
- Status:** A dropdown menu showing "ONGOING".
- Verification:** A dropdown menu showing "Unverified".
- Completed on:** A text input field.
- Verified on:** A text input field.
- Task Description:** A large text area for describing the task.
- Buttons:** Below the description, there are buttons for "File List", "Upload File", "Finish", "Verify", and "Reject".
- Comment:** A text input field for adding a comment.
- Post!** A button to submit the task information.
- Logout:** A button in the top right corner.

#### 4 – Creating a task:



This screenshot shows a web application window titled "Task List". It features a "Refresh!" button and a "Task Menu" dropdown. The dropdown menu is open, showing three options: "Create Task", "Edit Task", and "Delete Task". Below the menu is a table with multiple empty rows for task entries. To the right of the table, there are labels for "Assignee" and "Status", each followed by a small input field. At the bottom right, there is a "File L" button.



This screenshot shows a "Create Task" dialog box. It has a title bar with standard window controls. The dialog contains the following fields and options:

- SubTask Options:** Three radio buttons are present: "Single Subtask" (selected), "Monthly SubTasks", and "Trimestral SubTasks".
- Task Name:** A text input field containing the value "test".
- Task Description:** A larger text area containing the value "testtask".
- Assignee:** A text input field containing the value "Gabriel FREIRE".
- Buttons:** At the bottom, there are two buttons: "Back" and "Confirm".

After confirming and refreshing, the task will be added to the list. In order to see its attributes, just click it once. This is what you'll see:

The screenshot shows a web application window with a task management interface. On the left, there is a 'Task List' section with a 'Refresh!' button and a 'Task Menu' dropdown. The task list contains one entry: 'teste - Gabriel FREIRE'. To the right of the task list, there is a detailed view of the selected task. The 'Task Name' field contains 'teste'. The 'Author' is 'maslor' and the 'Created on' date is '2015/09/02 16:59:47'. The 'Assignee' is 'maslor', the 'Last Editor' is 'maslor', and the 'Last Edited on' date is '2015/09/02 16:59:47'. The 'Status' is 'ONGOING', the 'Verification' is 'Unverified', and the 'Completed on' field is empty. The 'Task Description' field contains 'teste des'. Below the description, there are buttons for 'File List', 'Upload File', 'Finish', 'Verify', and 'Reject'. At the bottom, there is a 'Comment' field and a 'Post!' button.

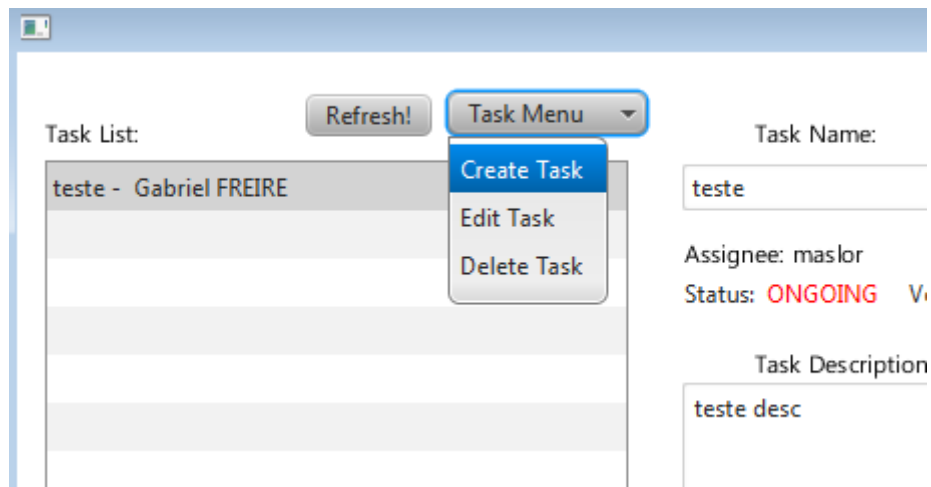
## 5 – Editing a task:

This screenshot shows the same task management interface as the previous one, but with the 'Task Menu' dropdown menu open. The menu has three options: 'Create Task', 'Edit Task', and 'Delete Task'. The 'Edit Task' option is highlighted in blue. The task list on the left still shows 'teste - Gabriel FREIRE'. The detailed view on the right shows the task details for 'teste'.

This screenshot shows the 'Create/Edit Task' form. It has three input fields: 'Task Name' with the value 'teste', 'Task Description' with the value 'teste des', and 'Assignee' with the value 'maslor'. At the bottom, there are two buttons: 'Back' and 'Confirm'.

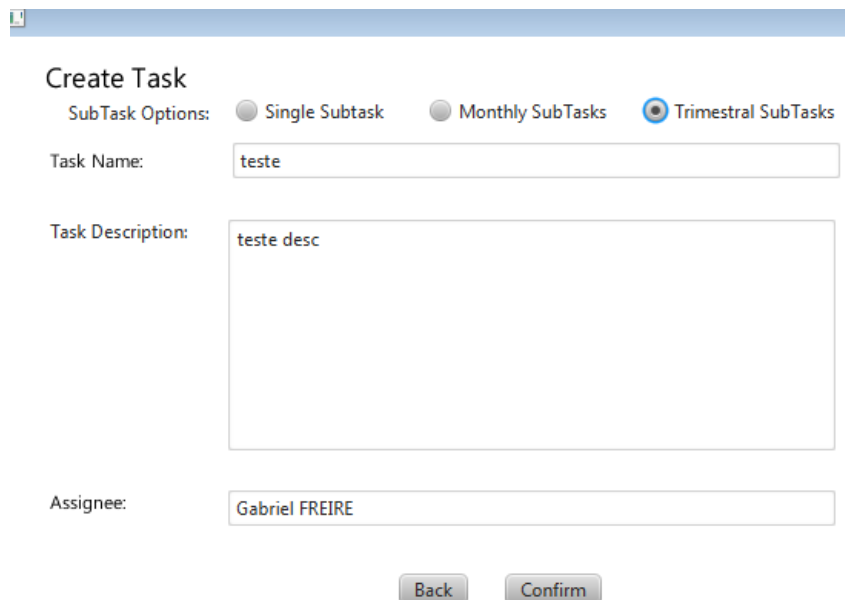
*Just click the Task Name field and the current attributes will be displayed.*

## 6 - Creating Sub tasks:



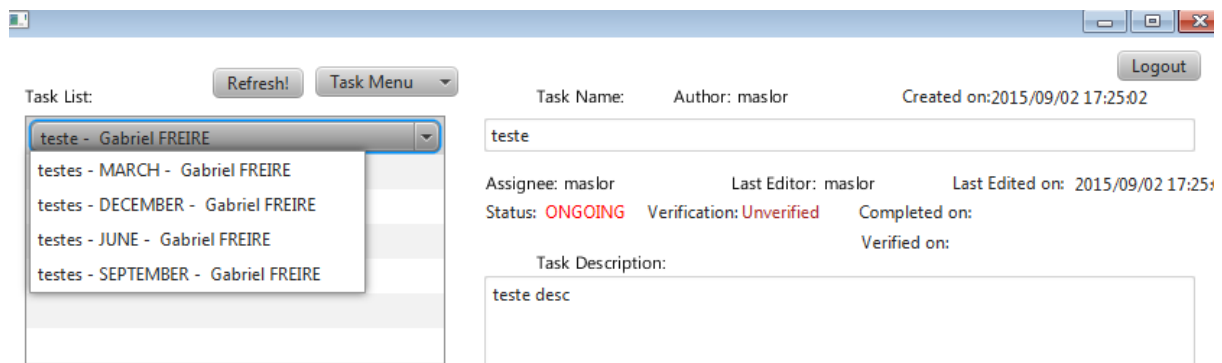
The screenshot shows a web application interface for task management. On the left, there is a 'Task List' with a 'Refresh!' button and a 'Task Menu' dropdown. The dropdown menu is open, showing options: 'Create Task' (highlighted in blue), 'Edit Task', and 'Delete Task'. The task list contains one entry: 'teste - Gabriel FREIRE'. On the right, there are input fields for 'Task Name' (containing 'teste'), 'Assignee' (set to 'maslor'), 'Status' (set to 'ONGOING' in red), and 'Task Description' (containing 'teste desc').

Remember to select (click on) the task which you want to add subtasks to!



The screenshot shows the 'Create Task' form. It has three radio buttons for 'SubTask Options': 'Single Subtask', 'Monthly SubTasks', and 'Trimestral SubTasks' (which is selected). Below these are input fields for 'Task Name' (containing 'teste') and 'Task Description' (containing 'teste desc'). At the bottom, there is an 'Assignee' field (containing 'Gabriel FREIRE') and two buttons: 'Back' and 'Confirm'.

You can only select **ONE** of the subtask options. Selecting more will probably not work as you want.



The screenshot shows the task management interface with a subtask list open. The 'Task List' on the left has a dropdown menu showing a list of subtasks: 'teste - Gabriel FREIRE', 'testes - MARCH - Gabriel FREIRE', 'testes - DECEMBER - Gabriel FREIRE', 'testes - JUNE - Gabriel FREIRE', and 'testes - SEPTEMBER - Gabriel FREIRE'. The 'Task Menu' dropdown is also visible. On the right, the task details for 'teste' are shown, including 'Task Name', 'Author: maslor', 'Created on: 2015/09/02 17:25:02', 'Assignee: maslor', 'Last Editor: maslor', 'Last Edited on: 2015/09/02 17:25:02', 'Status: ONGOING', 'Verification: Unverified', 'Completed on:', and 'Verified on:'. The 'Task Description' field contains 'teste desc'. A 'Logout' button is in the top right corner.

To open this subTask list, double click the task or press enter after clicking the task.