**Workmatec – [How to] questions**

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1. **How to create an account?**
2. Access Workmatec by opening link [https://www.workmatec.com](https://www.workmatec.com/).
3. Click hyperlink of Signup Now.
4. This will open form of new user registration. After entering all the detail click button of Sign Up and check your email.
5. Clicking the link from the email will activate your account.
6. Now you can use Workmatec by entering your provided login /password.
7. **How to create an Unstructured Task?**
8. Login to [Workmatec](https://www.workmatec.com).
9. Click link of Add new task from the dashboard.
10. This will open form to create your new task.
11. From this form you can:
    1. Make this task Personal or Official.
    2. Set your task title and description.
    3. Add email addresses for Assign To and Followers.
    4. Design Form as per your requirement.
    5. Add Task Summary, Tags and My Notes.
    6. Set reminder time, generate late notifications and repeat interval.
12. After setting above you are all set to send this unstructured task.
13. If there is no need to send this task to other user then without setting Assign To, Mark Complete this task.
14. Now you can view this task from the tab of Completed Task.
15. If you have to send this task to other user then enter email address in the field of Assign To and click button of Send.
16. This task will then appear in Inbox of selected user. From here he/she can send to other user or Mark Complete the task.
17. **How to create a Structured Task/Process?**
18. Login to [Workmatec](https://www.workmatec.com).
19. Click link of Add new task from the dashboard.
20. This will open form to create your new task.
21. Do all the steps written in Question # 2.
22. After creating form etc., open tab of Process.
23. From this tab you can create Activities/Templates, set rules and simulate/publish process.
24. Activities tab:
    1. By default one activity with the recipient type “Anonymous User” is created.
    2. You can change this activity to other type as per your requirement.
    3. Here you can create activities according to the type of process you are creating. For example if Leave Application Process is going to be created then following activities may be enough:
       1. Leave Submit
       2. Leave Approval
       3. Leave Status to Initiator/HR
    4. Click button of Add Activity.
    5. Select your required type from combo box of recipient type. If User is selected then you can enter its name or email address to be assigned to that activity.
    6. From here you can set its completion time too.
25. Templates tab:
    1. From this tab you can create two type of templates:
       1. Mail
          1. Enter title of template to be used as a reference later.
          2. Enter Subject of email and Recipient type.
          3. Draft body of email using user defined and system variables.
       2. Document
          1. Enter title of document to be used as a reference later.
          2. Enter Document Name.
          3. Draft body of document using user defined and system variables.
26. Rules tab:
    1. By default all the necessary rules will be created according to the Activities and Templates created earlier (refer to point 7 and 8).
    2. For example if Leave application process is created (refer to point 7 C) then three rules w.r.t. activities created.
    3. If there are two templates (one email and one document) then these will be created after rules of activities.
    4. You can change and create new rules as per your requirement.
    5. Click button of Add Rule.
    6. This will open new screen. From here you can set new rule.
    7. From the first combo box select name of activity/title of template and then select its status from next combo box.
    8. Click hyperlink to add condition (if required).
    9. Condition will be added using form fields/data fields created during design form (refer to question # 4).
    10. After setting condition, select from combo box that what to do with this activity/template when above condition met.
27. Settings tab – Anonymous User:
    1. If recipient type of first activity is Anonymous User then you can use following links to initiate that task:
       1. Link
       2. Embed
       3. Iframe
       4. Popup
28. Settings tab – Simulation:
    1. From simulation you can check flow of whole the process on single machine.
    2. This is very useful because form value authentication can also be checked through simulation.
29. Settings tab – Publish:
    1. By using this tab you can publish your process to be used within your workspace users.
    2. Same screen will be used to uninstall process.
30. **How to design a form?**
31. Login to [Workmatec](https://www.workmatec.com).
32. Click link of Add new task from the dashboard.
33. This will open form to create your new task.
34. Click link of Design Form.
35. This will open form of Design Form. Click combo box of Add Item.
36. This will show list of all the available controls. Select control as per your requirement.
37. You can change the name, type and position of control in edit mode.
38. You can create duplicate field and make it mandatory in edit mode.
39. **How a process is executed after publish?**
40. Login to [Workmatec](https://www.workmatec.com).
41. Click link of Personal/Official from dashboard.
42. Open tab of Initiate.
43. Open your process e.g. Leave Application process.
44. This will open form with the following fields:
    1. Followers
    2. Task Summary
    3. Tags
    4. My Notes
    5. More Settings for late notifications
45. User will send this task after filling the form.
46. User can see the detail of its task in link of I am following when he/she is added in:
    1. Assign To
    2. Followers
    3. User name in Activities (refer to question # 3 point 7)

In this screen user further adds his comments in response.

1. Second user in the process will open its Inbox and send its task after filling the form.
2. Every user will also be notified through email about his task.
3. **How you can analyze task/processes and create/view reports?**
4. Login to [Workmatec](https://www.workmatec.com).
5. Click link of Analytics.
6. From this screen you can analyze your current, late and completed tasks.
7. For detailed report click button of Detail Report.
8. This will open new screen to see detail report of any process.
9. From here you can also export your report to excel and share with other workmatec users.
10. **How to add document to a task?**
11. Login to [Workmatec](https://www.workmatec.com).
12. Click link of Documents from dashboard.
13. If you want to share document with your followers then click hyperlink of Attach and select file from computer.
14. Now the followers of this task/process can view that file from screen of I am following.
15. **How to view task from Calendar view?**
16. Login to [Workmatec](https://www.workmatec.com).
17. Click link of Calendar from dashboard.
18. From this screen you can view your task by clicking the link in calendar.
19. **How to view notifications?**
20. Login to [Workmatec](https://www.workmatec.com).
21. Click link of Notifications from dashboard.
22. From this screen you can view notifications of:
    1. Share Task/Process
    2. Share Document
    3. Add user in Follower
    4. Remove user from Follower
23. **How to edit your structured task/process?**
24. Login to [Workmatec](https://www.workmatec.com).
25. Click link of Repository from dashboard.
26. Open your required process.
27. This will open your process and from here you can edit the form, activities, templates and rules etc. (refer to question # 3).
28. **How to share a process?**
29. Login to [Workmatec](https://www.workmatec.com).
30. Click link of Repository from dashboard.
31. Click image hyperlink against the process.
32. This will open screen of Share Form. From here you can share the process:
    1. Share with: From this option you can share the process with other user in same workspace. When one process owner makes some changes then other process owner will also see that change at his workspace.
    2. Create a copy for: From this option you can share the process with other user in same workspace and separate instance will be created for that user.
33. User who has been shared the process can view/get this from the tab of Shared in Repository view.
34. **How to create Users?**
35. Login to [Workmatec](https://www.workmatec.com).
36. Click icon of settings from the top right corner.
37. This will open page of settings. Click tab of Users.
38. Click button of Add User.
39. This will open new screen. Enter email address of the user from current workspace. You can add more than one user in one go.
40. **How to create Departments?**
41. Login to [Workmatec](https://www.workmatec.com).
42. Click icon of settings from the top right corner.
43. This will open page of settings. Click tab of Departments.
44. You will see one department already created with the name My Department. This cannot be deleted.
45. My Department can be renamed.
46. For creating new department, click button of Add Department.
47. This will open new screen. Here you can enter its name, select parent and head of department.
48. **How to manage the organization structure (Report to)?**
49. Login to [Workmatec](https://www.workmatec.com).
50. Click icon of settings from the top right corner.
51. This will open page of settings. Click tab of Report to.
52. Click button of Add Report to.
53. This will open new screen. From here user will select/add following:
    1. Department Name: Select user from the combo box (refer to question # 13)
    2. Team: Add Name/Email of required user(s) which are related to this team.
    3. Supervisor: Select supervisor of this team.
54. After saving data it will create records according to number of users selected. For example if email addresses of two users were selected then it will create two records showing their name, email address and his/her reporting manager.
55. **How to create Groups?**
56. Login to [Workmatec](https://www.workmatec.com).
57. Click icon of settings from the top right corner.
58. This will open page of settings. Click tab of Groups.
59. Click button of Add Group.
60. This will open new screen. From here user will enter name of group and its description.
61. After saving group name, select button of Members from the main screen of Groups.
62. Click button of Add Members.
63. This will open new screen. From here user can enter name(s) or email address(s) to be included in that group.
64. After adding names, save this group.

**Actors**

1. Bob (sub-ordinate of Blain and from department sales and marketing)
2. Alice(sub-ordinate of Blain and from department sales and marketing)
3. John(owner Acme corporation)
4. Arthur(Director Acme corporation)

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|  | **How to create an account?**   * Access the workmatec by link [www.workmatec.com](http://www.workmatec.com) * Bob clicks sign up * Enter his name, Valid email and password * Bob will receive an email in his email * Bob clicks the received link for activation * Bob can use his user name and password   **Result**   * Account will be created   Opening the browser, entering the link “workmatec.com”, clicking sign up  , sign up page appears, entering name, entering email address, entering password, entering password again.  Sing in the account, entering email Id, Entering password.  Dashboard appears |
| **2.** | **How to create a new leave application task?**  **How to create an account?**   * Bob logins into Workmatec application. * He selects “Add new task” to create new task * Bob gives Task Title and Description … * Selects Alice as assignee of his task * John and Arthur will follow the events of this task * Bob assigns due date for this to be completed * Bob sends this task by pressing Send button   **Result**   * Task will go into the complete box of Bob * Task will come in the inbox of Alice * Both John and Arthur will receive this task in “I am following” page for comments.   Clicking on “create new task”, Entering task name ”Leave application”, setting Task description as “use this process to apply for leave”  Sharing Task with manager for suggestions/comments,  Entering email id acme.arthur@workmatec.com, employees list appears, selecting the manager “arthur”, clinking save button,  Setting due date for the task, clicking on home button. |
| **3** | **How to collaborate on leave application?**   * Alice logins Workmatec application and found new task in “I am following” * She opens “I am following” * She founds leave application process task * She adds comments to the “Leave application task” * Mr. Arthur logins workmatec application * Arthur founds some new feeds in “I am following” * He further adds his comments in response   **Result:**   * Comments of Arthur are visible in all followers and assignee accounts   Manager(arthur) logging in workmatec account, clicking on I am following button  Found leave application task there, adding comment for that task, clicking in the comment text field , typing suggestion , clicking outside that text field |
|  | **How to add document to a task?**   * Alice login workmatec application * Alice wants to share a document with his followers * Alice Selects I am following module of workmatec application * Alice clicks attach for its “Leave application task” * Selects a file from his computer * Arthur login the application * She Go to I am following * Found the attached document with leave application process * Bob logins * Select “I am following” * Found attached document with leave application task   Result:   * Collaboration occurs   Manager “Arthur” logging in, clicking I am following, clicking on “attach” selecting a document from machine |
|  | **How to mark a task as official?**   * Alice logins the workmatec application * She Go to inbox * She Opens leave application process * Click on the official button   Result:   * Task will be moved in to the official module from inbox   Logging in workmatec, creating a new task, clicking the official button |
|  | **How to make a leave application task a process?**   * Opens leave application process and Clicks on Design form * Adds text field “Employee Name” * “Leave Subject” * “Starting date” * “Ending date” * “responsible person name” * “Designation” * Save the form * Alice clicks on process and then activities * Add activity “Leave Application”, “Manager approval”, “Director approval”, and HR Update * Clicks on Rules * When application complete activate manager approval * When manager approves activate director approval * When director approves activate HR Update * She then clicks on Settings and select Simulate to test working of process * Fills the form and Presses “Approve” * Press send button to move to next activity. She then opens next activity. Clicks on “Manager approval” * Presses Approve. * Send button activates next activity. Similarly other she fills and completes remaining activities. * Presses HOME button   Result:   * Task will become a process with a form * Activities and rules would be applied on the process * Simulation will show the running condition of the process   Logging in the account, going to personal tasks,  Clicking leave application process, clicking process, process page appears, clicking form, entering field statement, selecting field type clicking next button |
|  | **How to make create organization?**   * Peter login to workmatec application * Peter Go to settings * He is Clicking users * Clicking add user * He Enters Email “acme.blain@workmatec.com” * Selecting Department “” * Peter Selecting report to * He is Selecting department “” * Entering email of blain [acme.blain@workmatec.com](mailto:acme.blain@workmatec.com) * Selecting [acme.peter@workmate.com](mailto:acme.peter@workmate.com) supervisor of blain * Clicking save   Result:   * Employee(blain) would be added to the organization * Blains department would be set * His designation would be set as director   Logging in , clicking settings, general settings page appears, clicking users, clicking “add user”, add user menu appears, entering user name, entering email address, clicking save button. |
|  | **How to manage departments of organization?**   * John logging in to the workmatec application * John Clicking setting * John Clicking department * Clicking add Department * Entering Department name “” * Selecting Parent Department “Acme corporation” * Clicking Save * Clicking Department   Result:   * New Department “” would be added to acme corporation   logging in, clicking settings, general settings appears, clicking departments, clicking add new departments button, new department menu appear, |
|  | **How to manage the organization structure?[Report to]**   * John logins to workmatec corporation * He Click settings * He Clicking report to * He Click add Report to * Selecting department “acme corporation” * Entering user name [acme.arthur@workmatec.com](mailto:acme.arthur@workmatec.com) * Selecting supervisor as john * Clicking save button   Result:   * Arthur reporting to john as a director of acme corporation   Logging in, clicking settings, clicking report to button, Selecting department name, entering team member email or user names, Selecting supervisor, clicking save button |
|  | **How to create groups?**   * John logins to workmatec application * Clicking Settings * Clicking Group * Clicks Add group * Entering Group name “” * Entering Description * Clicking Save * Clicking members * Clicks add member * Entering Email “” * Clicking Save   Result:   * Group would be created * And member will be added to it   Logging in, clicking settings, clicking groups, Selecting “add group” entering group name “Agile group” and description “Agile team of our organization”, clicking save button |
|  | **How to add members to a group?[covered in previous Q]**  Logging in , clicking on settings, selecting groups, clicking on members button, clicking add members, entering user name or email id. Clicking save button |
|  | **How to change recipient?**   * John Logged in to workmatec application * Selects inbox * Select Leave Application process * Clicks on process * Clicks activities * Clicks “Application form” * Select recipient type “Department” * Select Department “acme corporation” * Press Save * Login from Arthur account Leave application will be available after publishing it(in initiate box)   Result:   * All employees belongs to acme corporation will receive the leave application process in their initiate box   Logging in, clicking on the leave application process, clicking process, clicking activities, clicking on activity “start”, clicking recipient type “department”, entering department name, departments list appear, select a department |
|  | **How to specify some questions/controls/ fields for an activity?**   * John logged in to workmatec application * Selects inbox * Selects Leave application * Clicks process * Clicks activity * Clicks on settings of Application Form * Un-Checks Employee name * Clicks Settings * Press simulate * Clicks Application Form   **Result:**  Logging in, clicking personal, clicking on leave application process, clicking on process, clicking activities, clicking settings button of activity “start”  Un-checking fields those are not required for this activity |
|  | **How to preview a process?[simulation has been covered]**  Logging in, clicking personal, clicking on leave application process, clicking process, clicking settings, clicking simulate button. |
|  | **How a follower can preview a process?**  Leave application process follower ”Arthur” logging in from his account, clicking I am following, clicking simulate button |
|  | **\*How to add rules to a process?[covered]**  Logging in, clicking repository, clicking leave application process, clicking rules , clicking add new rule , new rule menu appears, selecting start activity from if, selecting condition “is completed”  Selecting “Activate” action from than , selecting end activity from drop down |
|  | **\*How to add activity?[covered]**  Logging in, clicking personal, clicking leave application process, clicking process button, clicking activities, clicking add new activity, add new activity menu appear, Entering activity name, |
|  | **How to publish a process?**   * John login workmatec application * Selects inbox * John Clicks Leave application process * John Clicks process * John Clicks Settings * John Clicks Publish * Blain Logins * Selects inbox * Selects initiate box   Result:   * Process will be published and will received in all employees initiate box   Logging in, clicking repository, clicking leave application process, clicking settings, clicking publish |
|  | **How to edit a published process?**   * John logins account * Selects “I am following” * Clicks edit for “Leave application process” * Edits “Leave application process” and press home button   Result:   * Process will be edited   Logging in, clicking repository, clicking leave application process |
|  | **How to tag a process/task?[should I cover it in creation of task?]**  Logging in, clicking personal, clicking leave application process , clicking on tags button , entering tag, clicking save |
|  | **How to uninstall a process?**   * John Logins workmatec application * Selects inbox * Clicks Leave Application process * Clicks Process * Clicks Settings * Clicks Uninstall * Blain Logins * Selects inbox * Selects initiate box   Result:   * Process will be uninstall and will be removed from the initiate boxes of employee   Logging in, clicking repository, clicking leave application process, clicking settings clicking uninstall |
|  | **How to Queue?**   * John Logins workmatec application * Selects inbox * Select leave application process * Selects process * Selects activities * Selects manager approval * Selects recipient type group * Enter group name “Managers” * Publish the process * Carol logins the workmatec application * Selects inbox * Clicks initiate * Clicks Leave application process * Fills the form and presses submit * Blain Logins workmatec application * Selects inbox * Selects Queue * Clicks Leave application process * Clicks approve   **Result:**   * Any manager can approve from queue |
|  | **What is BAM? Second Level of BAM?**   * John logins application * Selects BAM * Select Leave application process from drop down list * Clicks on the count   Result:   * John view the reports of Leave application process and will view the second level of reports |
|  | **How to view reports?** |
|  | **How to share a process (Published)?**   * John logins leave application * Selects Repository * Clicks on share button of leave application process * Enters Email address “Acme.emma@workmatec.com” and select user from the list * Emma logins workmatec * Selects repository * Click shared   **Result:**   * Process will be shared |
|  |  |