
WORKFLOW ASCENDANT

6.0

DEVELOPER'S GUIDE



CONCERNING HORIZON ASCENDANT, INC.

Horizon Ascendant is a software publishing company whose flagship product is Workflow Ascendant, an all-in-one design template which allows individuals with minimal programming experience to develop robust workflow applications in an IBM Notes or Web 2.0 / Responsive environment. Horizon Ascendant also offers a range of services around that software package including customer development, training and consulting.

www.horizonascendant.com

COPYRIGHTS AND TRADEMARKS

The information contained in this manual is confidential and subject to license. In particular (but not limited to), this confidentiality concerns the invention of virtual and extended states, the inventive manner in which events are defined and invoked via code abstraction in state documents and the implementation of near real-time delegation.

The information contained in this document can be modified without prior notification and represents in no way a commitment on the part of Horizon Ascendant.

IBM Notes and Domino are trademarks of the IBM Corporation.

Chapter 1 - Introduction.....	v
1.1) General	v
1.2) Benefits.....	vi
1.3) Principles	vii
1.4) Roles and Reserved Names.....	viii
1.5) Recommended Practices	ix
1.5) About This Guide.....	x
Chapter 2 - Process: Routing Documents.....	xi
2.1) General	xi
2.2) Simple Document Routing.....	xii
2.3) Manual Document Routing	xiii
2.4) Automatic Document Routing.....	xiv
2.5) Manual and Automatic Document Routing	xv
2.6) Selective Operations	xvi
2.7) Parallel Operations	xvii
2.8) Inclusive Operations	xviii
2.9) Parallel and Inclusive Operations	xix
2.10) Extended Parallel Operations	xix
2.11) Extended Sequential Operations	xx
2.12) Child Documents	xxi
2.13) Email Notifications	xxiii
2.14) Actions (Comments)	xxiv
2.15) Historical Text.....	xxv
2.16) Document References	xxvi
2.17) Alert Timeouts	xxvii
2.18) Time Based Routing	xxviii
Chapter 3 - Constraints: Specifying Users.....	xxix
3.1) General	xxix
3.2) Roles	xxx
3.3) Fields	xxxi
3.3) Roles and Fields.....	xxxii
3.4) User Stack (Organizational Hierarchy)	xxxiii
3.5) State Stack	xxxiv
3.6) External (ERP, RDBMS ...).....	xxxv

Chapter 4 - Events: Directing Execution	xxxvi
4.1) General	xxxvi
4.2) Initialization	xxxvii
4.3) Modification Control (Field)	xxxviii
4.4) Modification Control (Panel/Section)	xxxix
4.5) Validation Control (General)	xxxix
4.6) Validation Control (Custom).....	xl
4.7) In-State Controls	xli
4.8) Timed Events	xliii
Chapter 5 - Content: Managing Data	xliv
5.1) General	xliv
5.2) Field Types.....	lxv
5.3) Fields	lxvi
5.4) Panels / Sections.....	lxvii
5.5) Document Layouts.....	lxviii
5.6) Simple List Creation	lxix
5.7) Simple List Usage.....	l
5.8) Tiered List Creation	li
5.9) Tiered List Usage	lii
5.10) Tables.....	liii
5.11) Bar Charts	liv
5.12) Gantt Charts	liv
5.13) Panel/Tab Visibility	lvii
5.14) Document Visibility	lvii
Chapter 6 - General References	lviii
6.1) General Web Interface.....	lviii
6.2) Notes Admin Interface	lviii
6.3) Workflow Document	lix
6.4) Delegation Document.....	lxii
6.5) Admin ACL Entry Document	lxii
6.6) Admin Field Document.....	lxiii
6.7) Admin Gantt Task Document	lxiv
6.8) Admin Language Document	lxv
6.9) Admin Reference Document.....	lxvi

6.10) Admin Role Document.....	lxvii
6.11) Admin State Document	lxviii
6.12) Admin Time Trigger Document	lxix
Appendix A - Licensing.....	lxx
Appendix B - Administration.....	lxxi
Appendix C - Debugging	lxxi
Appendix D - @Formulas and Reserved Field Names.....	lxxiii
Appendix E - List Classes.....	lxxiv
Appendix F - Script Library (WA Application Specific)	lxxv
Appendix G - JavaScript	lxxvi
Appendix H - Methodology	lxxvii

Chapter 1 - Introduction

1.1) General

Workflow Ascendant is an all-in-one design template which allows individuals with minimal programming experience to develop robust workflow applications in a responsive web environment. Anchored in a coherent methodology, this development model has been refined over the years through extensive experience in working with large companies in an international environment. IBM Notes developers can leverage their existing expertise with minimal knowledge in web technologies. Non IBM Notes developers can easily adapt to Workflow Ascendant's "plug and play" component approach. End-users can intuitively navigate [workflow documents](#).

All aspects of a process are defined via easily configurable documents. This includes document states, routing rules, notifications, time triggers, etc. There are no "black boxes" to deal with, providing complete visibility and direct control over every aspect of the workflow. The source code of Workflow Ascendant is exposed.

Workflow Ascendant is the proprietary software owned by Horizon Ascendant Inc. Use of this Software and derived applications from the Software are subject to the terms and conditions of the Horizon Ascendant Master Subscription License Agreement. Please review the terms of this document carefully. By using the Software and/or derived applications, you agree to all of the terms contained therein. Briefly here, applications developed using Workflow Ascendant are licensed on a subscription basis per IBM Notes Storage Facility database instance: **95 € / nsf file / month.**

We highly recommend that you view the various presentation and training videos made available on our web site: www.horizonascendant.com. These videos demonstrate and explain in great detail the various mechanisms of Workflow Ascendant and how they affect application behavior. After viewing these, you should have a firm grasp of the methodology which underlies this workflow development tool.

All the materials needed to get you going are available on the Horizon Ascendant web site. This includes the basic Workflow Ascendant template; videos along with the actual applications used therein, additional sample applications as well as a complete Domino environment to run those applications. To note that provision of the latter in no way confers licenses to use that software. It is made available only to provide you a jump start - you will need to obtain corresponding licenses from the IBM Corporation for applications put into production.

Use this guide as a reference. In addition to systematically presenting Workflow Ascendant, it has been designed to provide easy access reminders to assist you in the context of you developing your workflow applications.

Our well wishes to you in your development efforts from all of us here at Horizon Ascendant!

1.2) Benefits

Workflow Ascendant allows you to rapidly create Business Process Management applications with the latest web functionality USING A COHERENT AND COMPREHENSIVE METHODOLOGY.

- **Minimal end-user training costs.** Avoid the “not another application to learn” syndrome. Once users learn how to use one application developed with Workflow Ascendant, they know how to use any new ones later put in place as they all operate by the same principles: only the data/content changes.
- **Minimal maintenance costs.** Workflow Ascendant developed applications are designed such that volatile elements (the process, email notifications, allocating specific users, etc.) are configured in easily understood documents (by version!) while more stable and complex elements (code) are referenced as stand-alone modules in a centralized code library. And as is true for end-users, a system administrator need only understand how to manage one of these applications in order to manage any new ones.
- **Minimal development costs.** *Workflow Ascendant has been designed to leverage existing, traditional IBM Notes developer skills.* Develop fast and efficiently. Seeing is believing. We invite you to take a look at the various presentation videos contained on our web site.

A few specific benefits to cite:

- **Routing Conditions.** As rules are rooted in a methodology - mix and match them to suite your needs: manual and automatic routing; selective, parallel, inclusive, extended parallel and extended sequential operations; automatically create child documents; route documents based on time events, etc.
- **Workflow Actions.** Send personalized emails, launch agents and update document fields based on document state changes.
- **Reference Allocation.** Automatically assign unique and sequential references to documents.
- **Counters / Delays.** Automatically send emails and/or update document fields when a trigger is activated or deactivated.
- **Real-Time Delegation.** Users can designate replacements (while away from the office, for example). Control is automatically returned to the original users after the designated period.
- **Intervention History.** Each intervention is automatically recorded along with the number of days spent at that step in the process.
- **Display Statistics Graphically.** Display Bar Charts and Gantt Charts for your end-users via plug-and-play components.
- **Version Control.** Migrate easily from one workflow version to another. All existing documents adhere to the previous process while new documents follow the new workflow.
- **Multi-lingual end-user environment.** Change languages with the click of a button.
- **Multi-date format.** Force all dates to appear in a specific format (American or European) - regardless of the date parameters set on user's PCs.
- **Rich Test Environment.** Simulate the passing of time via built-in agents to test your workflow definitions. Variable logging levels allow you to monitor every aspect of the workflow process.
- **Integrated Responsive Web Design.** Automatically adjusts to the characteristics of the device being used (mobile phone, tablet, desktop), making your Workflow Ascendant applications out-of-the-box ready for mobile access.

1.3) Principles

Processes

- An IBM Notes Form contains all the data associated with a workflow document and corresponds to a collection of State (configuration) documents which define the process.
- Each [State document](#) has a unique name (identifier) in the context of a given process.
- State documents are connected to each other via a Current State - Next State relationship.
- The behavior of a given workflow document is dictated by the definitions contained in the corresponding State document while in that state.
- The State document entitled `$created$` is always the first state in the workflow.
- A State document which has no Next State is known as a Terminal State (archived).
- Each State document is comprised of a set of rules, each of which is associated with a given Constraint.
- Constraints refer to a profile of those who can intervene in a workflow document at that state.
- Workflow documents advance in the process when a user selects the *Send* button.
- A workflow document will be automatically archived when the *Send* button is selected if the following state is a Terminal State or if there are no valid users defined for the next state (which constitutes an undefined error condition).

Constraints

- Constraints refer to the profiles of those who can intervene in a workflow document at a particular state.
- A Constraint consists of either a role name (in the initial state only) or a field name (in all other states).
- In a workflow document, the corresponding field of a State document constraint must resolve to a list of user names.
- The aforementioned list of user names are the only individuals who can intervene in the workflow document at that particular state.
- Workflow Ascendant provides several mechanisms by default to facilitate the assignation of individual user names to the various roles and fields of a workflow application.

Content

- Who can modify a workflow document at a given point in time is dictated by the constraints defined in the corresponding State document.
- In addition, Workflow Ascendant provides a number of mechanisms by which to define *which parts* of a document the aforementioned individuals can modify.
- Information in workflow documents can be initialized and controlled by routines referenced in the various State documents.
- Routines which initialize and control data in the workflow documents, some of which are supplied by default and others supplied by the workflow developer, are contained in a centralized code library.

1.4) Roles and Reserved Names

ROLES

- **[WAArchive]**. Workflow Ascendant automatically assigns the current user (field **WACurrentAuthors**) to this role when a document arrives at a terminal state.
- **[WAListRI]**. Those individuals who are responsible for managing lower level configuration documents such as lists accessed in the workflow documents.
- **[WAManager]**. Those individuals who are responsible for managing the database. By default, the administrative portion of Workflow Ascendant is only visible to users assigned to this role.
- **[WARefAlloc]**. Workflow Ascendant automatically assigns the current user (the server specified in the active **Language** document) to this role when a document is awaiting reference allocation. This is the case if you are working in a distributed environment and the replica you are working with does not reside on that server.
- **[WASupervisor]**. Those individuals who can see all documents.

FIELD NAMES

- **WAAuthor**. The user name of the individual who created the workflow document.
- **WACurrentAuthors**. The list of user names who can intervene in the document at that moment in time.
- **WACurrentAuthorsDisplay**. The list of current user names displayed to the end users in the various views.
- **WACurrentState**. The name of the workflow document's current state.
- **WADocRef**. Contains the unique reference allocated to the workflow document.
- **WAErrorMessage**. Contains any error messages which block advancing the document in the workflow.
- **WAFormName**. The process name displayed to end users.
- **WAHistoryAuthors**. The list of users who have intervened in the workflow document to date.
- **WAReaders**. The list of users who can visualize the workflow document (in addition to those who have or who can modify the workflow document).
- **WAVersionRef**. The version of the workflow document.

1.5) Recommended Practices

- **Information Completeness.** A workflow document should contain all the information necessary for a responsible individual (RI) to make a decision regarding the next step in the process.
- **Process Ignorance.** Individuals who intervene in a given process should generally not need to know what that process is - only what they need to do when it is their turn to intervene in the workflow.
- **Next State Coherence.** Choices to be made by a RI relative to a given dossier should be presented in a consistent way across a given workflow and across applications. An example of this would be to always present the following choices in the same order: *To be modified, Rejected, Approved.*
- **Data Modification.** One and only one individual should be responsible for modifying any given piece of data in the workflow document (to ensure data integrity). For those cases where modifications need to be made, the workflow document should be routed back to the responsible individual (such as the document author).
- **Comments.** Each individual who intervenes in the workflow should have a field reserved for his or her usage to add any and all comments related to that dossier. To note this is particularly essential in the context of a request for modification (as mentioned prior).
- **Email Notifications.** When a document is advanced in the workflow, those who are next in line to intervene should be notified by email with a document link back to the original workflow document. It is also often the case that all those who have intervened in the document are notified when the document is eventually archived (or rejected).

1.5) About This Guide

This guide is designed to be used in conjunction with videos and applications ([WAAApplication01.nsf](#) and [WAAApplication02.nsf](#)) provided on the Horizon Ascendant website. The videos demonstrate what the various mechanisms look like in operation to the end-user while the applications provided hands-on experience in using them. The guide illustrates (in most cases graphically) the components which make up those mechanisms and (hopefully) serves as an ongoing reference in developing workflow applications.

The objective of this guide is not to demonstrate how to put those mechanisms in place. As most of the “development” involves configuring documents, a large majority of these manipulations should be straightforward. In cases where they are not, however, videos have been provided to assist in this and others will continue to be added as time goes on and the need for such becomes apparent.

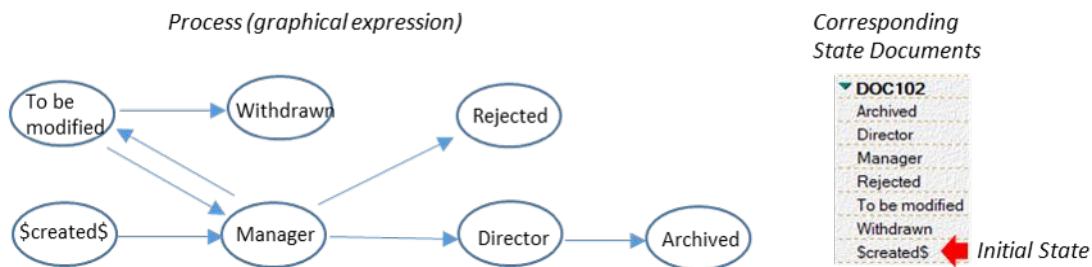
This guide was created with you the developer in mind.

- One concept, one page. Everything regarding a given topic is put right in front of you.
- Consistent presentation:
 - *Purpose* - a concise description of what the section is about
 - *What it looks like* - typically what the end-user sees in operation
 - *How to make it happen* - an illustration of the components behind the displayed functionality
 - *Additional notes and references* - where to go for additional information
- Graphical presentation. Visually see how components are connected to each other.
- Hyperlinks. Select **Ctrl+Click** on entries in the index or any blue highlighted text to navigate through various subjects in the document. Select **Alt+<left arrow>** to return to where you were previously.

Chapter 2 – Process: Routing Documents

2.1) General

The process or workflow for a given type of document is defined in [State documents](#). Contained in these documents are all rules / process related definitions.



State documents are categorized first by version, then by form (process) and finally by state. The current workflow version for a given process is stored in the active [Language document](#). When that version value is changed, newly created workflow documents will follow the new State documents while those already in the process will follow the previous ones. Also stored in the Language document are the actual Notes form names which corresponds to the Form Names (an alias) that the user sees.

STATE								
Version	Form Name	State Name	State Type					
V01	DOC102	Manager	<input checked="" type="radio"/> Standard <input type="radio"/> Virtual					
Workflow Notifications Actions Documentation								
GENERAL CONSTRAINTS								
	The following RIs can intervene...	And forward to the following states...	Which will be displayed as...	Parallel Operation	Extended Operation	Inclusive Operation	View Display	Historical
1	Manager	To be modified	<state>	-	-	-	<user>	<state>
2	Manager	Rejected	<state>	-	-	-	<user>	<state>
3	Manager	Director	Approved	-	-	-	<user>	<state>

Workflow States are connected by Current State - Next State relationships. Detailed in each State document, these relationships define the paths of the workflow. In the example above, if the user selects the option *Approved* (followed by the *Send* button) in state *Manager*, the document will be routed to state *Director*.

The following sections demonstrate some of the many ways to route documents. What is not addressed is how specific users are designated as being those responsible to intervene at a given state. This is discussed in detail in [Chapter 3 - Constraints: Specifying Users](#). Note that the applications referenced here are configured with sample users (available in the default configuration for download):

- *a1/Horizon*
- *blue/Horizon*
- *Etc.*

2.2) Simple Document Routing

PURPOSE

Simple Document Routing is when there is only one next state defined from the current state. This is typically the case when a user submits an initial request to be approved by a manager. In that scenario, the user selects the *Send* button and the document advances to that state. In the Notes client, no choices are presented to the end user and the document advances directly.

WHAT IT LOOKS LIKE

The screenshot shows a user interface for document routing. At the top, there are buttons for 'Cancel', 'Save', and 'Send'. Below these, a dropdown menu is open, showing the option 'Created'. To the right, a callout box states: 'Only one selection is available here for the end'. Below this, the main interface shows a table with columns: Reference, Title, Process, and Current State. The 'Current State' column shows 'Manager' with a red arrow pointing to it. A callout box to the right says: 'The result after selecting Send from the initial state \$created\$ in the process'.

HOW TO MAKE IT HAPPEN

The screenshot shows the database interface for defining document states. On the left, a tree view shows 'V01' expanded, with 'DOC101' selected. Under 'DOC101', 'Archived' and 'Manager' are listed, with '\$created\$' highlighted and a red arrow pointing to it. On the right, a table defines the initial state behavior:

	The following RIs can intervene...	And forward to the following states...	Which will be displayed as...
1	[*]	Manager	Created

A red circle highlights the 'Manager' entry in the 'And forward to the following states...' column. To the right, a callout box specifies: 'State document V01 (version), DOC101 (process), \$created\$ (state)'.

[*] in the initial state indicates that any user with access to the database can create a document of this type.

\$created\$ is a reserved word and always refers to the initial state in a process.

ADDITIONAL NOTES / REFERENCES

2.3) Manual Document Routing

PURPOSE

Manual Document Routing indicates that the user is given a choice as to where to advance the document. The user selects the desired option from the drop down list followed by the *Send* button. The workflow document is then forwarded accordingly. In the Notes client, the user first selects the button *Send*, upon which a dialog box is presented from which to make the selection.

WHAT IT LOOKS LIKE

The screenshot shows the Notes client interface. At the top, there are buttons for Cancel, Save, and Send. A red arrow points to the Send button. A dropdown menu is open, listing three options: To be modified, Rejected, and Approved. Below this, the document details are shown: Reference: MDR.00016, Title: DOC102, Current State: Director. A red arrow points to the Director label. To the right, a callout box states: "Multiple selections are made available to the user in state Manager". Further down, another callout box states: "The resulting state of the workflow document is Director after the user selects Approved followed by".

HOW TO MAKE IT HAPPEN

The screenshot shows the configuration of a manual document routing rule. On the left, a tree view shows nodes for DOC102, Archived, Director, Manager, and Rejected. A red arrow points to the Manager node. On the right, a table defines the rule: "The following RIs can intervene..." (Manager, Manager, Manager), "And forward to the following states..." (To be modified, Rejected, Director), and "Which will be displayed as..." (<state>, <state>, Approved). A red circle highlights the "Approved" entry. To the right, a callout box states: "State document V01, DOC101, Manager. Note the alias Approved which is presented to the user in place of".

ADDITIONAL NOTES / REFERENCES

2.4 Automatic Document Routing

PURPOSE

Automatic Routing advances a document in the workflow according to a set of predefined rules. What we have seen up to this point in time are Manual Rules which allow the user to select the next state. Upon selecting the *Send* button, Workflow Ascendant automatically determines the next document state and advances it based on the conditions defined in the [State document](#) evaluated against values stored in the workflow document.

WHAT IT LOOKS LIKE

Two documents are created with different total amounts (as seen from an iPhone X)

From state Manager, the user selects *Send* for both documents which are in turn routed to two different states

HOW TO MAKE IT HAPPEN

The following RIs can intervene...	And forward to the following states...	Which will be displayed as...	Parallel Operation	Extended Operation	Inclusive Operation
a Manager b Manager	Director CEO	Approved Approved	-	-	-

STOCKED PROCEDURES / AGENTS

The document will be initialized with the following stocked subroutine(s)...	The document will be initialized with the following stocked subroutine(s)...
a - b -	- -

AUTOMATIC ROUTING RULES

The following state will be routed to automatically...	If the following condition is met...
a Director b CEO	Total < 500 @True

The last frame to the right directly above forms an *If-Then, If-Then, ...Else* statement (exactly like the *@If* command) and are evaluated from top to bottom. The last entry in this list must always be *@True* (the default condition). Automatic rules must always have the same display name per responsible individual (in this case *Approved*).

ADDITIONAL NOTES / REFERENCES

2.5) Manual and Automatic Document Routing

PURPOSE

Manual and automatic rules can be combined in the same state. A classic example of this is a manager who may send a request back to the author, reject the request or approve it. In the latter case however, the document may take a different path depending on the amount of the request. If the amount is less than or equal to, say, 500, the document will be sent to a *Director*. If, however, the amount exceeds 500, it will be sent to the *CEO*. In the corresponding State document, the first two rules will be manual, the last two automatic.

WHAT IT LOOKS LIKE

The screenshot shows a user interface for document routing. At the top, there are buttons for 'Cancel', 'Save', and 'Send'. Below them is a dropdown menu with three options: 'To be modified', 'Rejected', and 'Approved'. To the right of this menu, a callout box states: 'Four documents are created with different total amounts'.

Below the dropdown is a table listing four documents:

Reference	Title	Process	Current State
black			To be modified
MAR.00014	Incomplete Dossier	DOC104	To be modified
blue			
MAR.00013	Amount 500	DOC104	CEO
red			
MAR.00012	Amount 50	DOC104	Director

Three red arrows point from the right side of the table to the 'Current State' column for each row, indicating the state of each document.

To the right of the table, another callout box states: 'From state Manager, one document is sent back to the author, another is rejected (displayed in the view Archived) and the remaining two (50 and 500) are'.

HOW TO MAKE IT HAPPEN

The screenshot shows the configuration for document routing. On the left, a sidebar lists states: Archived, CEO, Director, Manager, Rejected, To be modified, Withdrawn, and Screated\$. A red arrow points from this sidebar to the 'DOC104' section below.

The main area is divided into sections:

- STOCKED PROCEDURES / AGENTS**: A table with columns for 'The following RIs can intervene...', 'And forward to the following states...', 'Which will be displayed as...', 'Parallel Operation', 'Extended Operation', and 'Inclusive Operation'. It contains four rows (1, 2, a, b) with their respective target states: 'To be modified', 'Rejected', 'Approved', and 'Approved'.
- AUTOMATIC ROUTING RULES**: A table with columns for 'The following state will be routed to automatically...' and 'If the following condition is met...'. It contains two rows (a, b) with conditions: 'Director' and 'CEO' respectively, and a circled condition 'Total < 500 @True'.

Note that manual rules have numbers (1 and 2 here) while automatic rules have letters (a and b here).

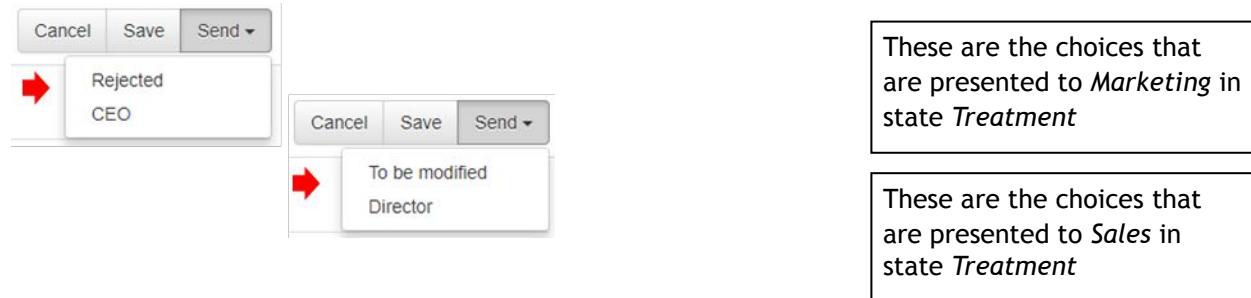
ADDITIONAL NOTES / REFERENCES

2.6) Selective Operations

PURPOSE

Different constraints (discussed in [Chapter 3](#)) can be combined within the same state. When this occurs, users only see the next states associated with their constraints. This is often referred to as **Next State Visibility**. The easiest way to understand this is in the context of an example.

WHAT IT LOOKS LIKE



HOW TO MAKE IT HAPPEN

The image shows a database manager interface for a document named 'DOC105'. On the left, there's a tree view with nodes like 'Archived', 'CEO', 'Director', 'Rejected', 'To be modified', 'Treatment', 'Withdrawn', and 'Screated\$'. A red arrow points from the 'Treatment' node to a table on the right. The table has four columns: 'The following RIs can intervene...', 'And forward to the following states...', and 'Which will be displayed as...'. It contains four rows:

	The following RIs can intervene...	And forward to the following states...	Which will be displayed as...
1	Marketing	{	<state>
2	Marketing	{	<state>
3	Sales	{	<state>
4	Sales	{	<state>

To the right of the table is a callout box containing the text: 'Note that if you intervene as the database manager, you will see all four choices as by default you assume all roles!'

Note that in this example, any user from *Marketing* or *Sales* is sufficient to advance the document to a different state.

ADDITIONAL NOTES / REFERENCES

2.7) Parallel Operations

PURPOSE

There are times in a process where multiple individuals must intervene in a given state before the document can be advanced. In the previous examples only one authorized user is sufficient to advance those documents in the workflow. A process that requires that an individual from multiple different groups (roles or fields) must intervene at a given point in time is referred to as a Parallel Operation. A process that requires that *all* individuals from a particular group (role or field) must intervene at a point in time is referred to as an [Inclusive Operation](#) (described in the following section). These operations can, of course, be combined in the same state.

WHAT IT LOOKS LIKE

Reference ^	Title ^	Process ^	Current State ^
e1			
POP.00006	Test Parallel	DOC106	Treatment
e2			
POP.00006	Test Parallel	DOC106	Treatment
green			
POP.00006	Test Parallel	DOC106	Treatment
yellow			
Reference ^	Title ^	Process ^	Current State ^
POP.00006	Test Parallel	DOC106	green
green			
POP.00006	Test Parallel	DOC106	Treatment
yellow			
POP.00006	Test Parallel	DOC106	Treatment

Users *e1* or *e2* (*Production*), *green* (*Sales*) and *yellow* (*Marketing*) are all solicited to intervene in doc POP.00006

The result after user *e1* intervenes in the document. Users *green* and *yellow* must now both intervene in the document for it to advance in the workflow

HOW TO MAKE IT HAPPEN

▼ DOC106	The following RIs can intervene...	And forward to the following states...	Which will be displayed as...	Parallel Operation	Extended Operation	Inclusive Operation
Archived						
Director						
Treatment	1 Marketing 2 Sales 3 Production	Director Director Director	Treated Treated Treated	Yes Yes Yes	- - -	- - -
CreatedS						

Note that in a parallel operation, users can intervene in any order.

ADDITIONAL NOTES / REFERENCES

2.8) Inclusive Operations

PURPOSE

There are times in a process where multiple individuals must intervene in a given state before the document can be advanced. The previous section [Parallel Operations](#) treated the case where an individual from multiple different groups must intervene at a point in time. This section treats the case where all individuals from a particular group must intervene at a given point in time - referred to as an *Inclusive Operation*. These operations can, of course, be combined within the same state.

WHAT IT LOOKS LIKE

Reference ^	Title ^	Process ^	Current State ^	
e1				
IOP.00004	Test Inclusive	DOC107	Treatment	
e2				
IOP.00004	Test Inclusive	DOC107	Treatment	

Reference ^	Title ^	Process ^	Current State ^	
red				
IOP.00004	Test Inclusive	DOC107	Director	

All the users in *Production* (users e1 and e2) are solicited to intervene in doc

The resulting state after both e1 and e2 intervene

HOW TO MAKE IT HAPPEN



	The following RIs can intervene...	And forward to the following states...	Which will be displayed as...	Parallel Operation	Extended Operation	Inclusive Operation
1	Production	Director	Treated	-	-	Yes

As with parallel operations, users can intervene in any order in an inclusive operation. Note that if you intervene as the database manager, the document will advance regardless of who else has intervened prior!

ADDITIONAL NOTES / REFERENCES

2.9) Parallel and Inclusive Operations

PURPOSE

Parallel Operations and Inclusive Operations can be defined in the same state and even in the same rule. For a description of each, reference the previous two sections.

WHAT IT LOOKS LIKE

Reference ^	Title ^	Process ^	Current State ^
e1			
PIO.00004	Parallel & Inclusive Op	DOC108	Treatment
e2			
PIO.00004	Parallel & Inclusive Op	DOC108	Treatment
green			
PIO.00004	Parallel & Inclusive Op	DOC108	Treatment
yellow			
e2			
PIO.00004	Parallel & Inclusive Op	DOC108	Treatment
green			
PIO.00004	Parallel & Inclusive Op	DOC108	Treatment
yellow			
PIO.00004	Parallel & Inclusive Op	DOC108	Treatment

Users *e1* and *e2* (*Production*), *green* (*Sales*) and *yellow* (*Marketing*) are all solicited to intervene in doc POP.00002

The result after user *e1* intervenes in the document (compare this to the example in [Parallel Operations](#)). Users *e2*, *green* and *yellow* must now all intervene in the document for it to advance in the process

HOW TO MAKE IT HAPPEN

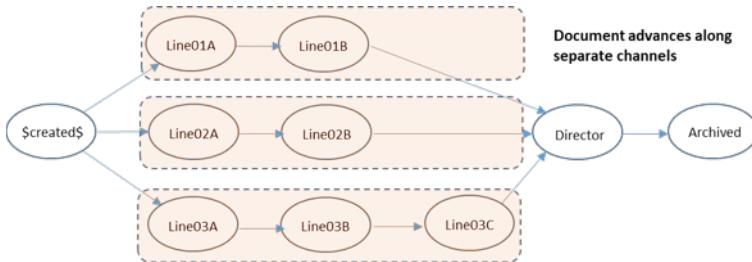
▼ DOC108 Archived Director Treatment \$created\$	The following RIs can intervene...	And forward to the following states...	Which will be displayed as...	Parallel Operation	Extended Operation	Inclusive Operation
	1 Marketing 2 Sales 3 Production	Director Director Director	Treated Treated Treated	Yes Yes Yes	- - -	- - Yes

In the above example, all users in *Production* and any one user from *Marketing* and any one user from *Sales* must intervene (in any order) at state *Treatment* for the document to advance..

ADDITIONAL NOTES / REFERENCES

2.10) Extended Parallel Operations

PURPOSE



Extended States “extend” the scope of a parallel operation. In a standard parallel operation, an actor from each of the different constraints (i.e., roles) must intervene for the document to advance. An extended parallel state, however, allows a document to advance along *separate channels* in parallel. The easiest way to understand this concept is in terms of the above graphic. The workflow document can advance from *Line02A* to *Line02B* without, for example, waiting for *Line01A* to advance to *Line01B* and *Line03A* to advance to *Line03B* (or any combination therein). The document only advances to *Director*, however, after the designated user(s) have all intervened in *Line01B*, *Line02B* and *Line03C*.

WHAT IT LOOKS LIKE

Reference ^	Title ^	Process ^	Current State ^				
@a1				@a2	@a2	@a2	@a2
EXS.00009	Ext Parallel Op	DOC109	Team Validation	EXS.00009	EXS.00009	EXS.00009	EXS.00009
@b1				@b1	@b1	@b1	@b2
EXS.00009	Ext Parallel Op	DOC109	Team Validation	EXS.00009	EXS.00009	EXS.00009	EXS.00009
@c1				@c1	@c2	@c3	
EXS.00009	Ext Parallel Op	DOC109	Team Validation	EXS.00009	EXS.00009	EXS.00009	

Interventions:
a1, c1, c2, c3, b1, a2, b2

HOW TO MAKE IT HAPPEN

DOC109 Archived Director Line01B Line02B Line03B Line03C Team Validation \$created\$	The following RIs can intervene...	And forward to the following states...	Which will be displayed as...	Parallel Operation	Extended Operation	Inclusive Operation	
	1 Line01AUser	Line01B	Validated	Extend	-	-	
	2 Line02AUser	Line02B	Validated	Extend	-	-	
	3 Line03AUser	Line03B	Validated	Extend	-	-	
	The following RIs can intervene...	And forward to the following states...	Which will be displayed as...	Parallel Operation	Extended Operation	Inclusive Operation	
	1 Line01BUser	Director	Validated	-	End	-	
	The following RIs can intervene...	And forward to the following states...	Which will be displayed as...	Parallel Operation	Extended Operation	Inclusive Operation	
	1 Line03BUser	Line03C	Validated	-	-	-	
Extension Start							
Extension End							
Extension Continue							

ADDITIONAL NOTES / REFERENCES

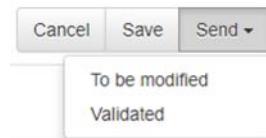
2.11) Extended Sequential Operations

PURPOSE

Extended Sequential Operations refer to the ability to “fuse” two states together. Prior examples have all looked at how one person advances a document in the process from one state to the next.

Even in the case where multiple users intervene in parallel, it is always the last person who selects the *Send* button who determines the next state. What if, however, the next state depends on the collective opinion of a group of users? In this case we need to make use of what we refer to as a *Virtual State*. When a document advances to a *Virtual State*, the rules of that state are executed immediately - effectively chaining two levels of rules together, one after the other.

WHAT IT LOOKS LIKE



In process **DOC110**, *Marketing*, *Sales* and *Production* are all solicited to intervene in documents at state *Treatment*, each being presented with the above choices. The business logic is that at least two of the three entities must validate the document for it to advance to the *Director* (otherwise it is sent back to the author for modification).

Reference ^	Title ^	Process ^	Current State ^
black			
ESO.00004	Ext Sequential Op 1	DOC110	To be modified
red			
ESO.00005	Ext Sequential Op 2	DOC110	Director

User e2 (*Production*) said no to both documents, green (*Sales*) said no to the first, yes to the second and lastly yellow (*Marketing*) said yes to both documents

HOW TO MAKE IT HAPPEN

Actions				
#	Field Names			
1				
2	Count			Count + 1
3				
4	Count			Count + 1
5				
6	Count			Count + 1

State: Virtual01

The following RIs can intervene...			And forward to the following states...		Which will be displayed as...		The following state will be routed to automatically...		If the following
a [^]	b [^]		To be modified	Director	Next	Next	a To be modified	b Director	Count < 2 @True

Each time *Validated* is selected in state *Treatment*, field *Count* is incremented by 1 in the document. When the document advances to *Virtual01*, the automatic rules are executed immediately and route the doc based on *Count*.

ADDITIONAL NOTES / REFERENCES

Action definitions are contained on the third tab of a [State document](#) and explained in [Section 2.14](#).

2.12) Child Documents

PURPOSE

Child documents are documents which are created from a parent document. Workflow Ascendant can manage a hierarchy of these documents. Examples might include: a Purchase Request, which can

lead to (or create) one or more Purchase Orders, which can lead to (or create) one or more Delivery Tickets. At document creation, each of these child documents subsequently follows its own process / set of [State documents](#).

WHAT IT LOOKS LIKE

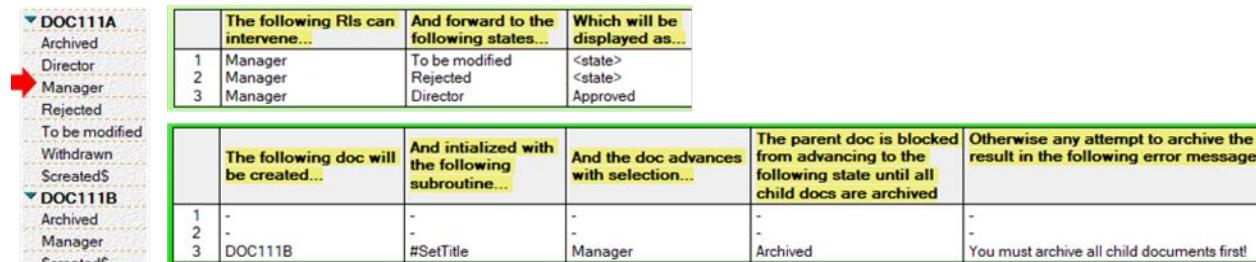
Reference ^	Title ^	Process ^	Current State ^
orange			
CDC.00006	Child Doc	DOC111B	Manager 
red			
CDP.00007	Parent Doc	DOC111A	Director 

You must archive all child documents first!

Cancel Save Send ▾

When Approved is selected at state Manager, child document *DOC111B* is automatically created

HOW TO MAKE IT HAPPEN



The screenshot shows a list of documents on the left and two tables on the right. A red arrow points from the 'Manager' state of DOC111A to the first table.

The following RIs can intervene...				And forward to the following states...		Which will be displayed as...	
1	Manager	To be modified	<state>	2	Manager	Rejected	<state>
3	Manager	Director	Approved				

The following doc will be created...		And initialized with the following subroutine...		And the doc advances with selection...		The parent doc is blocked from advancing to the following state until all child docs are archived		Otherwise any attempt to archive the result in the following error message	
1	-	-	-	-	-	-	-	-	-
2	-	-	-	-	-	-	-	-	-
3	DOC111B	#SetTitle	Manager	Archived				You must archive all child documents first!	

The following RIs can intervene...			And forward to the following states...		Which will be displayed as...	
1	["]		Manager	<state>		

DOC111B. This document is created (and forwarded) with the rights/profile of *Manager*.

ADDITIONAL NOTES / REFERENCES

The use of invoked routines (#SetTitle in the example above) is explained in [Section 4.2](#).

Note that you will normally want to hide the direct creation of a child document, an option which you can select in the [Language document](#).

2.13) Email Notifications

PURPOSE

Email notifications are typically sent when a document is advanced in the workflow. These messages can be personalized for each rule or “path” in State documents which include the: To, Cc, Bcc, Subject and Body fields. Default values are used from the active Language document for any fields left blank. A link back to the pertinent workflow document is automatically included at the end of each email notification.

WHAT IT LOOKS LIKE

DOC201. Dossier archived: "FDC.00039"
red
To: black
Cc: red, orange, black

For information only. The dossier FDC.00039 (DOC201) has been archived.

For additional details please select the following link:
[\[--- click here ---\]](#)

Notification sent from process *DOC201* state *Director* when *Archive* and the *Send* button were selected. Emails can be sent in Notes or MIME format (see Language document).

HOW TO MAKE IT HAPPEN



#	To	cc	bcc	Subject*	Body*
1	*N	WAHistoryAuthors		WAFormName + ". Dossier declined: " + @Char(34) + WADocRef + @Char(34)	" "For information only. The dossier " + WADocRef + " (" + WAFormName + ") has been declined without further action." " "For additional details, please select the following link:"
2	*A	WAHistoryAuthors		WAFormName + ". Dossier archived: " + @Char(34) + WADocRef + @Char(34)	" "For information only. The dossier " + WADocRef + " (" + WAFormName + ") has been archived without further action." " "For additional details, please select the following link:"
3	*A	WAHistoryAuthors		WAFormName + ". Dossier archived: " + @Char(34) + WADocRef + @Char(34)	" "For information only. The dossier " + WADocRef + " (" + WAFormName + ") has been archived." " "For additional details, please select the following link:"

Workflow Ascendant interprets the *Subject* and *Body* fields which contain executable IBM Notes @Formula language code. The latter of these is of multi-line format where each line represents an executable statement. In the address fields (*To*, *cc*, *bcc*), you can specify multiple values (one per line) mixing any of the following formats:

- *N - indicates the next individuals slated to intervene in the document
- *A - indicates the document author
- Specific user names or group names (from the Notes Directory)
- Field names (which in turn must contain valid user names or group names)

ADDITIONAL NOTES / REFERENCES

2.14) Actions (Comments)

PURPOSE

The **Actions** tab in the **State document** contains definitions to set fields in the workflow document. When the **Send** button in the workflow document is selected, as part of the executed designated rule, fields are updated according to those definitions. The specific example contained herein addresses how these definitions can be used to dedicate specific (comment) fields in the workflow document for each contributor in the process.

WHAT IT LOOKS LIKE



HOW TO MAKE IT HAPPEN

A screenshot of the State document editor showing the Actions (Activate) table. The table has columns for '#', 'Field Names', and 'Field Values*'. Row 1 contains field names like 'CommentsLabel00A', 'CommentsLabel00B', etc., and values like '@Name([CN]; @UserName)', 'Author', 'Manager : "[WAManager]"', etc. The 'Field Values*' column shows 'State \$created\$'. Below the table is another table with columns for 'The following RIs can intervene...', 'And forward to the following states...', and 'Which will be displayed as...'. It lists roles like Manager, Rejected, Director, etc., and states like Approved, Rejected, Director, etc. A red arrow points from the 'Manager' role in the sidebar to the 'Manager' row in the table. Another red circle highlights the 'Manager' role in the 'The following RIs can intervene...' column of the table.

Field names on the left are updated with executable @Formula statements which are interpreted on the right (one per line). In this specific example where the handling of comments is the object, the reserved field names are as follows (where # corresponds to a row in the *Comments* table):

- *CommentsLabel#A* - The user name to be displayed
- *CommentsLabel#B* - The user role to be displayed
- *SectionComments#* - The users ([Constraint](#)) that are authorized to modify the comments field for that row

ADDITIONAL NOTES / REFERENCES

Reference [Appendix D](#) for the most commonly used @Formulas used in State documents.

2.15) Historical Text

PURPOSE

The *History* tab of each workflow document details each intervention along with the number of days the document has remained with that user. The text description by default is set to the name of the next state but can be customized. Each time an individual selects the *Send* button, Workflow Ascendant adds a line to a table in that document in the tab entitled *Historical*:

- The user name
- The date the user advanced the document in the workflow
- A text description of what his or her action represents

WHAT IT LOOKS LIKE

Contributor	Date	Description	Days
black	04-03-2018	Created (Author)	0
orange	05-03-2018	Approved (Manager)	1
<Current State>			2
Total			3

DOC202 at state *Director* subsequent to the document being created by *black* and approved by *Manager orange*.

HOW TO MAKE IT HAPPEN

GENERAL CONSTRAINTS								
	The following RIs can intervene...	And forward to the following states...	Which will be displayed as...	Parallel Operation	Extended Operation	Inclusive Operation	View Display	Historical Description
1	Manager	To be modified	<state>	-	-	-	<user>	To be modified (Manager)
2	Manager	Rejected	<state>	-	-	-	<user>	Rejected (Manager)
3	Manager	Director	Approved	-	-	-	<user>	Approved (Manager)

Process *DOC202* state *Director* with personalized historical descriptions.

ADDITIONAL NOTES / REFERENCES

Note that you will typically not want to add an historical entry in the case of a [Virtual State](#), which you specify as part of the [State document](#) definitions.

2.16) Document References

PURPOSE

Workflow Ascendant provides for the automatic allocation of unique and sequential references to workflow docs. Virtually all processes require this in order to ensure the unique identity of a document and that no document is lost. With respect to the latter, you should always archive your workflow documents as opposed to deleting them. [Reference documents](#) are defined by version and process version in view *Workflow - References*.

WHAT IT LOOKS LIKE

Reference ^	Title ^	Process ^	Current State ^
IT Director			
ROC.00018	Historical	DOC202	Director

Reference *ROC.00018* is assigned to a workflow doc belonging to process *DOC202*

HOW TO MAKE IT HAPPEN

General										
<table border="1" style="width: 100%;"><thead><tr><th>Current State</th><th>Next State</th><th>#</th><th>Prefix</th><th>Length</th></tr></thead><tbody><tr><td>\$created\$</td><td></td><td>19</td><td>ROC.</td><td>5</td></tr></tbody></table>	Current State	Next State	#	Prefix	Length	\$created\$		19	ROC.	5
Current State	Next State	#	Prefix	Length						
\$created\$		19	ROC.	5						

Reference document *DOC202*. In this example, the next workflow document forwarded from state *\$created\$* to any other state will be assigned the prefix *ROC* followed by a text number of length 5 (filled with leading 0s) with the next number in the sequence (19) to be allocated: *ROC.00019*.

ADDITIONAL NOTES / REFERENCES

If you deploy your application on multiple servers, you will need to specify which server will allocate this unique reference in the [Language document](#).

2.17) Alert Timeouts

PURPOSE

Emails can be sent and alerts displayed if users do not intervene in a designated amount of time. These are defined in [Time Trigger](#) documents in the *Workflow - Time Triggers* view. In this example (*DOC202*), an email is sent to *Manager* (cc to *Director*) and an alert displayed when the document remains in state *Manager* for 3 days.

WHAT IT LOOKS LIKE

DOC202. Intervention requested (PAST DUE): "RO...
black Wednesday, February 28, 2018 02:05PM
To: orange Show Details
Cc: red

You have exceeded the time allotted to intervene in this document. You are therefore requested to do so at your earliest possible convenience.

For additional details, please select the following link:
[... click here ...]

[After 3 Days]

Icon alert

Email notification

HOW TO MAKE IT HAPPEN

General | Notifications | Actions | Documentation

CONTEXT

Start State	End State	State Change	Condition
Manager	-	-	@True

DETAILS

Trigger Type	Trigger Value	Agent to launch	History (User)	History (Description)
Days	3	-	n/a	n/a

EMAIL NOTIFICATIONS

To	cc	bcc	Subject	Body
WACurrentAuthors	Director		WAFormName + ". Intervention requested (PAST DUE): " + @Char(34) + WADocRef + @Char(34)	"You have exceeded the time allotted to intervene in this document. You are therefore requested to do so at your earliest possible convenience." "For additional details, please select the following link:"

Field Names	Field Values
WADelayIcon	150
WAChartCount01	WAChartCount01 : WACurrentAuthors

Field Names	Field Values
WADelayIcon	0

Field *WADelayIcon* is set to 150 (! In the view) when the trigger is activated, to 0 upon a

ADDITIONAL NOTES / REFERENCES

For testing purposes, you can simulate the passage of time using the controls displayed in the Admin view of the [General Web Interface](#).

2.18) Time Based Routing

PURPOSE

Workflow documents can be automatically routed based on elapsed time. These are defined in [Time Trigger](#) documents in the *Workflow - Time Triggers* view. In this example (DOC202), the document is routed to *Director* when *Manager* does not intervene with the allotted 5 day window. Multiple Time Trigger documents can be assigned to the same state.

WHAT IT LOOKS LIKE

DOC202. Intervention requested (REDIRECTED): "R..."

black Wednesday, February 28, 2018 02:25PM
To: red Show Details
Cc: orange

This request has been redirected to you as the previous respondent did not act within the time allotted. You are therefore requested to intervene in this dossier at your earliest possible convenience.

For additional details, please select the following link:
[\[... click here ...\]](#)

<p>orange</p> <p>ROC 00020 Time Trigger DOC202 Manager</p> <p>IT Director</p> <p>ROC 00020 Time Trigger DOC202 Director</p>	<p>[After 3 Days]</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Contributor</th><th>Date</th><th>Description</th><th>Days</th></tr> </thead> <tbody> <tr> <td>black</td><td>28-02-2018</td><td>Created (Author)</td><td>0</td></tr> <tr> <td>Forced Document Routing</td><td>05-03-2018</td><td>Final delay exceeded</td><td>5</td></tr> <tr> <td colspan="2"><Current State></td><td></td><td>0</td></tr> <tr> <td colspan="2">Total</td><td></td><td>5</td></tr> </tbody> </table> <p>[After 5 Days]</p>	Contributor	Date	Description	Days	black	28-02-2018	Created (Author)	0	Forced Document Routing	05-03-2018	Final delay exceeded	5	<Current State>			0	Total			5
Contributor	Date	Description	Days																		
black	28-02-2018	Created (Author)	0																		
Forced Document Routing	05-03-2018	Final delay exceeded	5																		
<Current State>			0																		
Total			5																		

HOW TO MAKE IT HAPPEN

General | Notifications | Actions | Documentation |

CONTEXT

Start State	End State	State Change	Condition
Manager	-	Director	@True

DETAILS

Trigger Type	Trigger Value	Agent to launch	History (User)	History (Description)
Days	5	-	Forced Document Routing	Final delay exceeded

EMAIL NOTIFICATIONS

To	cc	bcc	Subject	Body
Director	WACurrentAuthors		WAFormName + ". Intervention requested (REDIRECTED): " + @Char(34) + WADocRef + @Char(34)	<p>"This request has been redirected to you as the previous respondent did not act within the time allotted. You are therefore requested to intervene in this dossier at your earliest possible convenience."</p> <p>"For additional details, please select the following link:"</p>

ACTIONS (ACTIVATE)

Field Names	Field Values
WADelayIcon SectionComments02 CommentsLabel02A	0 Director : "[WAManager]" "IT Director"

ACTIONS (DEACTIVATE)

Field Names	Field Values

Reference the [Email Notifications](#), [Actions](#) and [Alert Timeouts](#) sections for additional explanations

ADDITIONAL NOTES / REFERENCES

For testing purposes, you can simulate the passage of time using the controls displayed in the Admin view of the [General Web Interface](#).

Chapter 3 – Constraints: Specifying Users

3.1) General

This chapter addresses the notion of constraints which refer to the profiles of those who can intervene in a workflow document at a particular state. This is in contrast to Chapter 2 which dealt exclusively with the routing of workflow documents between states. Constraints are defined in terms of roles or fields, each of which must in turn resolve to a set of user names. Only those users defined in *The following RIs can intervene* (see the graphic below) are allowed to modify the document for that particular document state. So in the following example, when a workflow document belonging to process *DOC205* is in state *Manager*, only the users whose names are contained in the corresponding workflow document field *Manager* can intervene (i.e., affect any modifications to that document).

STATE											
Version	Form Name	State Name	State Type								
V01	DOC205	Manager	<input checked="" type="radio"/> Standard <input type="radio"/> Virtual								
Workflow Notifications Actions Documentation											
GENERAL CONSTRAINTS											
	The following RIs can intervene...	And forward to the following states...	Which will be displayed as...	Parallel Operation	Extended Operation	Inclusive Operation	View Display	Historical Data			
1	Manager	To be modified	<state>	-	-	-	<user>	To be modified (Manager)			
2	Manager	Rejected	<state>	-	-	-	<user>	Rejected (Manager)			
3	Manager	Director	Approved	-	-	-	<user>	Approved (Manager)			

Note that it is strictly a coincidence that the state name and the constraint names are identical. Different constraints can also be defined in the same document (see [Selective Operations](#)).

In the workflow document, field *WACurrentAuthors* contains the list of users authorized to modify the document at that moment in time (field *WACurrentAuthorsDisplay* is what is displayed in the view). If a given user cannot edit a workflow document at a given state, it is because he or she is not listed in *WACurrentAuthors*.

If a workflow document is unexpectedly archived, this normally indicates that there were no valid user names in the state being routed to (an error condition).

3.2) Roles

PURPOSE

Role constraints refer specifically to IBM Domino roles and Role documents. The latter are contained in view *Workflow - Roles* from which the ACL can be managed directly via the button *Update ACL*. Role constraints must only be used in the initial *State document \$created\$* and only role constraints should be used therein. If role *[*]* is used, then any user can create a document for that process. If specific role names are specified, then only users belonging to those roles (with the exception of *[WAManager]*) are allowed to create workflow documents of that type. In example *DOC203* below, *yellow* from *Marketing* and *green* from *Sales* have both created a document followed by selecting the *Send* button.

WHAT IT LOOKS LIKE

The screenshot shows two separate sections of the Domino interface. On the left, a sidebar lists documents: DOC201, DOC202, DOC203, DOC204, and DOC205. Below this, another sidebar shows: DOC201, **DOC202** (circled in red), DOC204, and DOC205. To the right, a main panel displays two entries under 'e1' and 'e2'. Under 'e1', it shows: IRC.00008, Marketing (yellow), DOC203, Production. Under 'e2', it shows: IRC.00008, Marketing (yellow), DOC203, Production (with a red arrow pointing to the 'Production' field). Below these, under 'orange', it shows: IRC.00009, Sales (Green), DOC203, Manager (with a red arrow pointing to the 'Manager' field).

The above graphic to the left displays the available document creation choices for the *Marketing* and *Sales* people. In the graphic just underneath this, however, note the absence of *DOC203* from the list of choices presented to user *b1* (who doesn't belong to either of these two groups).

HOW TO MAKE IT HAPPEN

The screenshot shows the configuration for document *DOC203*. On the left, a sidebar lists: Archived, Director, Manager, Production, and **\$created\$** (with a red arrow pointing to it). To the right, a table defines role constraints:

	The following RIs can intervene...	And forward to the following states...	Which will be displayed as...
1	[Marketing] [Sales]	Production Manager	Created Created
2			

Only role constraint types should ever be used in initial state *\$created\$*

ADDITIONAL NOTES / REFERENCES

3.3) Fields

PURPOSE

Field constraints refer to field names contained in the corresponding workflow documents and Field documents. The latter are contained in view *Workflow - Fields*. Field constraints should be used in every **State document** with the exception of initial state \$created\$. The corresponding fields in the workflow documents must contain one or more valid user names. In example *DOC204* below, users *d1* and *d2* are designated as the responsible individuals (field constraint *Manager*) in state *Manager*.

WHAT IT LOOKS LIKE

Reference ^	Title ^	Process ^	Current State ^	
FCN.00003	Fields	DOC204	Manager	←
FCN.00003	Fields	DOC204	Manager	←

Users *d1* and *d2* are designated to intervene at

HOW TO MAKE IT HAPPEN

▼ DOC204		The following RIs can intervene...		
		And forward to the following states...		
		Which will be displayed as...		
Archived		1 Manager	To be modified	<state>
Director		2 Manager	Rejected	<state>
Manager		3 Manager	Director	Approved

DOC204 State document *Manager* dictates that only those users contained in the workflow document field *Manager* can modify the document at that state

▼ DOC204		Director		e1
		Manager	Manager	d1,d2
		WAAuthor	Author	

Users *d1* and *d2* are assigned to field *Manager* in Field document *Manager*

The document will be initialized with the following stocked subroutine(s)...
1 #waSetUsersField

Routine `#waSetUsersField` in State document \$created\$ sets the user names in the workflow document from the Field documents on document creation (see section [Document](#))

ADDITIONAL NOTES / REFERENCES

3.3) Roles and Fields

PURPOSE

Role and Field constraints can be used in harmony. With the exception of the initial state, all constraints in the workflow must resolve to fields containing user names. Since Field constraints are tied to the process version (and thus would require the recopying of user names between these documents), Workflow Ascendant provides a system to use roles which are independent of that. In example *DOC205* below, user *orange* is designated as the responsible individual (field constraint *Manager* which derives from role *Manager*) in state *Manager* (note that while the state name happens to be the same as that of the constraint in this example, they are in reality completely independent).

WHAT IT LOOKS LIKE

Reference ^ Title ^ Process ^ Current State ^

DOC205 Archived Director Manager Rejected To be modified Withdrawn \$created\$

orange

RFC.0003 Roles & Fields DOC205 Manager ←

User *orange* is designated to intervene at state *Manager*

HOW TO MAKE IT HAPPEN

▼ DOC205

The following RIs can intervene...	And forward to the following states...	Which will be displayed as...
1 Manager 2 Manager 3 Manager	To be modified Rejected Director	<state> <state> Approved

▼ DOC205

Responsible ^	
[CEO]	blue
[Director]	red
[Manager]	orange
[Marketing]	yellow
[Production]	e1,e2
[Sales]	green

Role Documents

Field Documents

The Field documents must not contain any user names as these names would take precedence over any names contained in the Role docs

The document will be initialized with the following stocked subroutine(s)...	
1 #waSetUserRole	

Routine `#waSetUserRole` in State document `$created$` sets the user names in the workflow document from the Role documents on document creation (see section [Document Initialization](#)) provided there is a corresponding Field

ADDITIONAL NOTES / REFERENCES

3.4) User Stack (Organizational Hierarchy)

PURPOSE

Workflow Ascendant provides the ability to implement a user stack from an organizational hierarchy. This hierarchy can be defined in the view *OU By Hierarchy* in *OU* documents or this information can be taken from an external source (in that case you would replace `#waSetUsersMGR` below with your own routine). To note that the system accounts for hierarchies of dynamic lengths. In this particular example, user *a1* creates and sends a *DOC206* document into the workflow where it progresses through the user's approval hierarchy.

WHAT IT LOOKS LIKE



HOW TO MAKE IT HAPPEN

ManagerIndex Manager	ManagerIndex + 1 @GetField("Manager" + @If(ManagerIndex >= 10; "", "0") + @Text(ManagerIndex))
-------------------------	---

3) State Validation Actions "Approved" pops the next manager off the stack



1) State \$created\$ Actions (#waSetUsersMngr) initializes the manager stack

The document will be initialized with the following stocked subroutine(s)...
1 #waSetUsersMngr #waSetUsersRole



2) State Virtual01 routes the document to Director if no other managers are left on the stack

The following state will be routed to automatically...		If the following condition is met...
a Validation	Director	(0 < ManagerMax) & (ManagerIndex <= ManagerMax) @True

CEO
Regional Center
Local Agency

View OU By Hier.

TYPE	Organisational Unit (OU)
Organisational Unit	CEO
Manager	d1/Horizon
Members	c1/Horizon
TYPE	Organisational Unit (OU)
Organisational Unit	Regional Center
Manager	c1/Horizon
Members	b1/Horizon

TYPE	Organisational Unit (OU)
Organisational Unit	Local Agency
Manager	b1/Horizon
Members	a1/Horizon a2/Horizon a3/Horizon a4/Horizon a5/Horizon black/Horizon

Top to bottom

ADDITIONAL NOTES / REFERENCES

Reference [Section 4.2](#) for explications regarding workflow document initialization.

3.5) State Stack

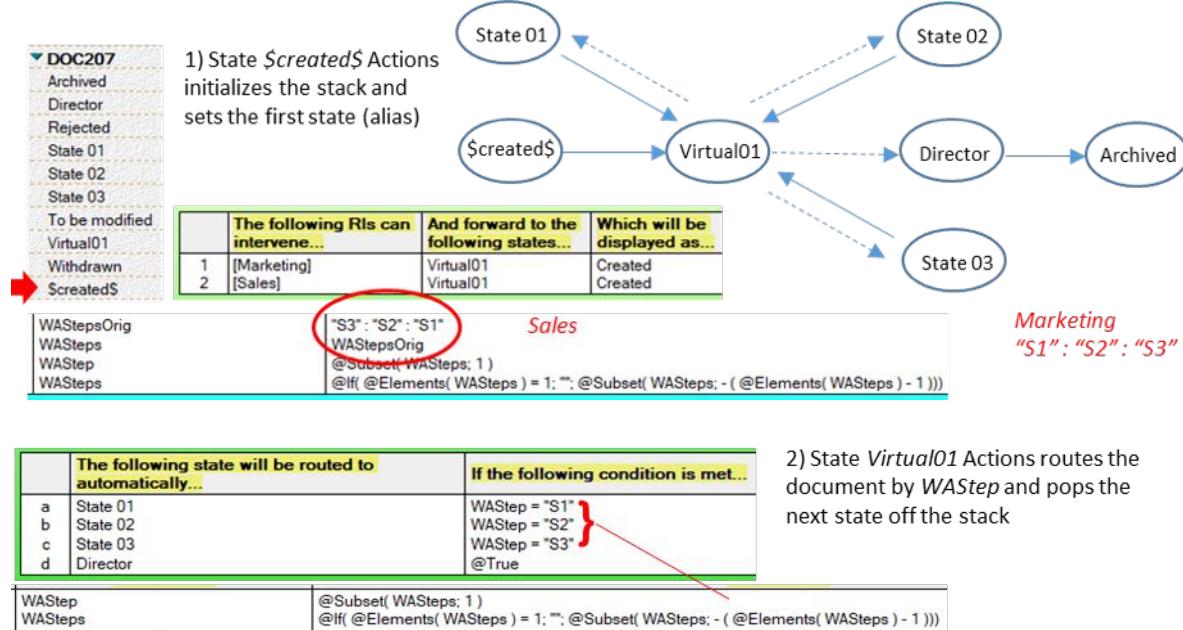
PURPOSE

Workflow Ascendant provides the ability to implement a state stack using [Actions](#) and an [Extended Sequential Operation](#). The latter, also referred to as a *Virtual State*, essentially acts as a subroutine which is called by the other states. In the example below, the workflow for *Marketing* is *State 01* to *State 02* to *State 03* while that for *Sales* is *State 03* to *State 02* to *State 01*. These stacks are initialized when the document is first advanced in the process and reset in [State document To be modified](#) (not shown below).

WHAT IT LOOKS LIKE

Marketing		Sales							
Reference	Title	Process	Other	Current State	Reference	Title	Process	Other	Current State
▼ green					▼ e1				
SST.00006	DOC207			State 01	SST.00007	DOC207			State 03
SST.00006	DOC207			State 02	SST.00007	DOC207			State 02
SST.00006	DOC207			State 03	SST.00007	DOC207			State 01
SST.00006	DOC207			Director	SST.00007	DOC207			Director

HOW TO MAKE IT HAPPEN



ADDITIONAL NOTES / REFERENCES

3.6) External (ERP, RDBMS ...)

PURPOSE

Workflow Ascendant provides the ability to pull users in from an external data source. This external source could be an ERP, a relational database or any number of other directories where user information is stored. To implement extracting users from an external source, you simply complement the built-in mechanisms of Workflow Ascendant with your own.

WHAT IT LOOKS LIKE

[This applies to any of the previous examples in this Chapter which all happen on the back-end.]

HOW TO MAKE IT HAPPEN

	The following RIs can intervene...	And forward to the following states...	Which will be displayed as...	Parallel Operation	Extended Operation	Inclusive Operation
1	[*]	Next State	To be approved	-	-	-

STOCKED PROCEDURES / AGENTS

	The document will be initialized with the following stocked subroutine(s)...	The document will be blocked from advancing if one of these stocked subroutines signals an error...
1	#SetUsersERP	-

WA Application Specific

- (Options)
- (Declarations)
- Initialize
- Terminate
- a_FormatName
- a_FormatNumber
- ~ GetDocValue

Sub SetUsersERP(doc As NotesDocument)
' -----
' Copies all users from the ...
' -----
Dim session As New NotesSession
' Your code here...
End Sub

Create your subroutine in script library *WA Application Specific*

```
Sub waExecuteStoredProcedure( doc As NotesDocument, procedureName As String )
' -----
' Contains a list of routines referenced in the State documents
' Any new routines accessed by the State documents must be added here in !
'
Select Case procedureName
    Case "#ControlFilePDF" :
        Call ControlFilePDF( doc )
    Case "#ControlTest" :
        Call ControlTest( doc )
    Case "#GenerateError" :
        Call GenerateError( doc )
    Case "#SetTitle" :
        Call SetTitle( doc )
    Case "#SetUsersERP" :
        Call SetUsersERP( doc )
    Case "#waCntMandFields" :
        Call waCntMandFields( doc )
```

Add your subroutine to *waExecuteStoredProcedure* in this same script library

ADDITIONAL NOTES / REFERENCES

Reference [Section 4.2](#) for explications regarding workflow document initialization.

Chapter 4 – Events: Directing Execution

4.1) General

Workflow Ascendant provides the mechanisms to control every aspect of the document cycle. Controls at a more global level such as where a document is routed and who can modify a document at a particular state are treated in [Chapter 2 - Process: Routing Documents](#) and [Chapter 3 - Constraints: Specifying Users](#). This chapter deals with what occurs when a workflow document is opened, modified and saved (sent in the workflow) including:

- Initializing the document
- Controlling who can modify which field or section of the document
- Validating field values and blocking a state advance for user data entry errors
- Validating field values prior to selecting the *Send* button (i.e., while the document is still being modified)

In addition to this, you can specify what events take place when a document has gone past a certain amount of days for a given state (or for a given section of the workflow for that matter).

Modification and validation rules are dependent by user and by state. What is modifiable and/or obligatory at one point in the process may or may not be at a different point in the process. To that end, Workflow Ascendant provides generic subroutines which are included in script library *WA Application Specific*; you complement these with your own application specific code and reference both in [State documents](#) (by rule - which implies by user and by what action is to be taken). These routines use the following two fields for all error handling:

- **WAEErrorMessage** - any text put in this field will be displayed as an error and block the workflow document from changing state.
- **FieldError** - if field *WAEErrorMessage* is not empty, then any field names put in this field will result in a red circle being displayed next to those fields (provided you follow the conventions in [5.3 Fields](#)).

You can of course choose to use your own mechanisms.

4.2) Initialization

PURPOSE

Workflow Ascendant provides multiple ways to initialize field values in workflow documents. To do so, you simply complement the built-in mechanisms that Workflow Ascendant itself uses with your own. Call application specific routines in the pertinent [State document](#) using field *The document will be initialized with the following stocked subroutine(s)*. Any subroutines included in this list (each name must be preceded by #) will be executed when a user modifies a workflow document at that state - provided that the corresponding code is duly created in script library *WAApplicationSpecific*. In the example below, the *Title* field is automatically updated with stocked text when document *DOC208* is first created (state *\$created\$*). Note that if your code updates field *WAErrorMessage* with text, it will be displayed as an error message when the document is opened (in a Notes client, the opening of the document is also blocked).

WHAT IT LOOKS LIKE

Title	New title set by stocked procedure	←
Total	0	
Field 1		

HOW TO MAKE IT HAPPEN

	The following Rls can intervene...	And forward to the following states...
1	[*]	Manager

	The document will be initialized with the following stocked subroutine(s)...
1	#waSetUsersRole #SetTitle

WA Application Specific ^ Sub SetTitle(doc As NotesDocument)
'-----
'-----
doc.Title = "New title set by stocked procedure"
End Sub

Script Library *WAApplicationSpecific*, Subroutine *SetTitle*

```
Sub waExecuteStoredProcedure( doc As NotesDocument, procedureName As String )  
'-----  
' Contains a list of routines referenced in the State documents  
' Any new routines accessed by the State documents must be added here in waExecuteStoredProcedure  
'-----  
Select Case procedureName  
    Case "#ControlFilePDF" : Call ControlFilePDF( doc )  
    Case "#ControlTest" : Call ControlTest( doc )  
    Case "#GenerateError" : Call GenerateError( doc )  
    Case "#SetTitle" : Call SetTitle( doc )  
    Case "#SetUsersERP" : Call SetUsersERP( doc )  
    Case "#waCntMandFields" : Call waCntMandFields( doc )
```

In the same script library, include the call to your code in the following subroutine:
waExecuteStoredProcedure

ADDITIONAL NOTES / REFERENCES

For updating document fields at state change, reference section [Actions \(Comments\)](#).

4.3) Modification Control (Field)

PURPOSE

Workflow Ascendant provides ways to control who can modify which fields in a document. In the Workflow tab of a [State document](#) further below, fields under *Users* are set dynamically by `#waSetUserRole` and fields under *Modifiable Fields* are used dynamically by `#walnitModFields`. To render these definitions effective, you will need to add XPages and/or Notes controls for each field which operate independently (meaning use one or the other or both depending on the clients you use to access the application). In example *DOC209* below, only *Marketing* can modify *Field04*.

WHAT IT LOOKS LIKE



HOW TO MAKE IT HAPPEN

State \$created\$		State CEO	
The following RIs can intervene...	And forward to the following states...	The following RIs can intervene...	And forward to the following states...
1 [Marketing]	Manager	1 CEO	Archived

Note: The document will be initialized with the following stocked subroutine(s)...
1 #waSetUserRole | #walnitModFields | #walnitModTabs

The screenshot shows the IBM Designer interface with the "Workflow" tab selected. Below it is a table titled "Field Name" with columns for "Users", "Modifiable Fields", and "Modifiable Tabs". The "Marketing" row is highlighted with a red oval. Below the table is a "FieldMarketing (Field) : Default Value" panel with a "Default Value" section containing the formula "#Field04".

Put the field names to be controlled in fields `Field<name>`. These will be copied into field `FieldModifiable` by routine `#walnitModFields` when the corresponding RIs (under *Users*) modify the document, rendering the applicable fields modifiable in the document.

The screenshot shows the XPages Properties panel with the "Compute Dynamically" section selected. It contains the formula `isFieldReadOnly(this.getId())`. Below it is another panel for "Field04 (Field) : Input Enabled" with the formula `@IsMember(@ThisName:FieldModifiable) | @IsMember("WAManager":@UserRoles)`.

ADDITIONAL NOTES / REFERENCES

Reference [Section 4.2](#) for explications regarding workflow document initialization.

4.4 Modification Control (Panel/Section)

PURPOSE

Workflow Ascendant provides ways to control who can modify which portions of a document. In the Workflow tab further below, fields under *Users* are set dynamically by `#waSetUserRole` and panels under *Modifiable Tabs* are used dynamically by `#walnitModTabs`. To render these definitions effective, you will need to add XPages and/or Notes controls for each panel/section which operate independently (meaning implement those applicable to the clients you use to access the application). In example *DOC209* below, only *CEO* can modify *Tab03*.

WHAT IT LOOKS LIKE



HOW TO MAKE IT HAPPEN

State \$created\$		State CEO	
The following RIs can intervene...	And forward to the following states...	aaa	bbb
1 [Marketing]	Manager	1 CEO	Archived

Field Name	Users	Modifiable Fields	Modifiable Tabs
CEO	CEO	FieldCEO T	TabCEO T
Director	Director	FieldDirector T	TabDirector T
Manager	see below		
Marketing	Marketing	FieldMarketing T	TabMarketing T

Put the tab names to be controlled in fields *Tab<name>*. These will be copied into field *TabModifiable* by routine `#walnitModFields` when the corresponding RIs (under *Users*) modify the document, rendering the applicable panels or sections modifiable in the document.

Compute Dynamically Compute on Page Load
isTabReadOnly(this.getId())

XPages Content_DocWF01
Tab03 Read-only parameter

Notes Section Control Tab03 Computed for display parameter

ADDITIONAL NOTES / REFERENCES

Reference [Section 4.2](#) for explications regarding workflow document initialization.
`isTabReadOnly(this.getId())`

4.5 Validation Control (General)

PURPOSE

Workflow Ascendant provides a general, built-in field validation mechanism. It verifies *by state* that designated fields contain a value - but only if the current user has the ability to modify those fields. To that end, this mechanism must be used in conjunction with [Modification Control \(Field\)](#). Should this not meet your requirements, reference the following section [Validation Control \(Custom\)](#). In the example *DOC210* below, the *Field04* field must contain a value for the document to advance. *Note that [WAManager] is not controlled by default!*

WHAT IT LOOKS LIKE

Workflow Ascendant 2 You must supply a value for those fields marked by a red circle

Tab 1 Tab 2 Tab 3 Tab 4 Tab 5 Tab 6 Comments Historical

Cancel Save Send ▾

Menu ▾

Tab 2

Field 03	<input type="text"/>
Field 04	<input type="text"/> ●

HOW TO MAKE IT HAPPEN

The following RIs can intervene...	And forward to the following states...	Which will be displayed as...	Parallel Operation	Extended Operation	Inclusive Operation
1 [Marketing]	CEO	<state>	-	-	-

STOCKED PROCEDURES / AGENTS

The document will be initialized with the following stocked subroutine(s)...	The document will be blocked from advancing if one of these stocked subroutines signals an error...
1 #waSetUserRole #walnitModFields #walnitModTabs	#waCntMandFields

Mod Field (current user)	Mod Tab (current user)	Obligatory	Error (current user)
[FieldModifiable T]	[TabModifiable T]	[FieldObligatory T]	[FieldError T]

Design Reference

FieldObligatory (Field) : Default Value

Run Client Formula
"Field04"

Field03: Field03 **Field04: Field04**

Compute Dynamically **Compute on Page Load** `!isRedCircleError(this.getId())`

Field04_E (Field) : Value

Run Client Formula
`@if(@IsMember(@LeftBack(@ThisName: "_E"); FieldError); "P. m")`

XPages (Wingding font)
Notes

ADDITIONAL NOTES / REFERENCES

4.6 Validation Control (Custom)

PURPOSE

Workflow Ascendant provides for custom validation mechanisms. Call your application specific subroutines in the pertinent [State document](#) using field *The document will be blocked from advancing if....* Any subroutines included in this list will be executed when the *Send* button is selected at that state - provided that the corresponding code is duly created in script library *WAApplicationSpecific*. In the example below, *Field 1* and *Field 2* must contain identical values when document *DOC211* is forwarded (state *\$created\$*).

WHAT IT LOOKS LIKE

Workflow Ascendant 2

Fields marked with a red circle must contain identical values!

Tab 1 Tab 2 Tab 3 Tab 4 Tab 5 Tab 6 Comments Historical

Cancel Save Send ▾

Field 1 aaa •

Field 2 bbb •

HOW TO MAKE IT HAPPEN

The document will be initialized with the following stocked subroutine(s)...	The document will be blocked from advancing if one of these stocked subroutines signals an error...
1 #waSetUserRole	#ControlTest

Script Library *WAApplicationSpecific*

```

Sub ControlTest( doc As NotesDocument )
    ' -----
    ' -----
    ' -----
    Dim fieldErrorL As New ItemList

    ' Initialize variables
    ' -----
    errorMessage = ""

    ' Get the error field info
    ' -----
    If ( doc.Field01( 0 ) <> doc.Field02( 0 ) ) Then
        Call fieldErrorL.PushOnItem( "Field01" )
        Call fieldErrorL.PushOnItem( "Field02" )
        If Not fieldErrorL.IsListEmpty() Then errorMessage = "Fields marked with a red circle must contain identical values."
    End If

    ' Update the document
    ' -----
    doc.WAErrorMessage = errorMessage
    Call List_SetDocFieldFromList( doc, "FieldError", fieldErrorL )
    Call waSetRedCirclesNotes( doc )
End Sub

```

```

Sub waExecuteStoredProcedure( doc As NotesDocument, procedureName As String )
    ' -----
    ' Contains a list of routines referenced in the State documents
    ' Any new routines accessed by the State documents must be added here
    ' -----
    Select Case procedureName
        Case "#ControlFilePDF" :
        Case "#ControlTest" :
        Case "#ControlTotal" :
            Call ControlFilePDF( doc )
            Call ControlTest( doc )
            Call ControlTotal( doc )
    End Select
End Sub

```

Custom Control

Title	Title	T	•
Total	Total	#	•
Field 1:	Field01	T	•
Field 2:	Field02	T	•

abc Label Name: Field02_E
Style

ADDITIONAL NOTES / REFERENCES

For information regarding the *ItemList* class, reference [Appendix E - List Classes](#).

4.7 In-State Controls

PURPOSE

Workflow Ascendant provides a template from which you can control events which occur outside of a state change. The agent *myInStateFieldControl* is provided as a model you can use to customize for your own specific application requirements. In example *DOC211* below, an error condition is flagged when button *Test Fields* is selected if fields *Field07* and *Field08* do not contain identical values.

WHAT IT LOOKS LIKE

Workflow Ascendant 2 Fields marked with a red circle must contain identical values!

Tab 1 Tab 2 Tab 3 Tab 4 Tab 5 Tab 6 Comments Historical

Field 07 aaa •
Field 08 bbb •

Test Fields

HOW TO MAKE IT HAPPEN

```
var doc:NotesDocument = document1.getDocument(true)
var docVirtual = database.createDocument()
var docVirtualHolderAgent = database.getAgent("(myInStateFieldControl)")

docVirtual.replaceItemValue("Field07", doc.getItemValue("Field07"))
docVirtual.replaceItemValue("Field08", doc.getItemValue("Field08"))

docVirtualHolderAgent.runWithDocumentContext(docVirtual)

viewScope.waErrorMessage = docVirtual.getItemValueString("WAErrorMessage")
viewScope.waErrorFieldNames = docVirtual.getItemValue("FieldError")
var noErrors:Boolean = ((viewScope.waErrorMessage == "") || (viewScope.waErrorMessage == null ))
```

Button **Test Fields**,
onClick event

content_DocWF01Tab04 - Custom Control (myInStateFieldControl) - Agent

Objects Reference

Initialize

Sub Initialize
 Dim session As New NotesSession
 Dim inMemoryDoc As NotesDocument
 Dim boxAString As String
 Dim boxBString As String

 ' Get the in memory document
 ' -----
 Set inMemoryDoc = session.DocumentContext

 ' Update the error flags accordingly
 ' -----
 Call MyControlTest(inMemoryDoc)
End Sub

This agent executes subroutine *MyControlTest* (essentially identical to that in the previous section) on the in-memory (virtual) document

ADDITIONAL NOTES / REFERENCES

For additional information on the field configuration of the “red circle” mechanism, refer to [Section 5.3.](#)

4.8) Timed Events

PURPOSE

Workflow Ascendant provides the capability to launch events based on elapsed time. These are defined in [Time Trigger documents](#) in the Workflow - Time Triggers view. In example DOC211 below, the application log is updated by agent (WA Test Agent) when the document remains in state CEO for 3 days. In addition to launching agents, you can specify stocked subroutines (the names of which to be preceded by #) in script library WA Application Specific.

WHAT IT LOOKS LIKE

WA Test Agent Test Run (Workflow Central 1).
Accessed Document, Field 'Title': My Title.
Agent "(WA Test Agent)" was successfully executed.
Workflow Central 1.WA Process Days Agent.END (Workflow)

Text written to the agent log provided that this has been created and configured in the [Language document](#).

HOW TO MAKE IT HAPPEN

TIME TRIGGER	
Version	Form Name
V01	DOC211

General | Notifications | Actions | Documentation |

Start State	End State	State Change
CEO	-	-

Trigger Type	Trigger Value	Agent to launch
Days	3	(WA Test Agent)

(WA Test Agent) - Initialize

```
Option Public
Use "WA Utility Routines"
Sub Initialize
    ' -----
    ' -----
    Dim docCurrent As NotesDocument
    Dim agent As NotesAgent

    ' Initialize classes
    ' -----
    Set agent = wagv_Session.CurrentAgent

    ' Get the document from which the agent was launched
    ' -----
    If Not ( agent.ParameterDocID = "" ) Then
        Set docCurrent = wagv_DBCurrent.GetDocumentByID( agent.ParameterDocID )
    End If

    ' Write entry to the log
    ' -----
    Call LogWrite( wagv_LogJournal, agent.Name & " Test Run (" & wagv_Applicati
    If ( docCurrent Is Nothing ) Then
        Call LogWrite( wagv_LogJournal, "Intentional Error: the current documen
    Else
        Call LogWrite( wagv_LogJournal, "Accessed Document, Field 'Title': " &
    End If
End Sub
```

In this example, all fields in *Notifications* and *Actions* are empty. To display alerts and/or route documents as timed events, reference Sections [2.17\) Alert Timeouts](#) and [2.18\) Time Based Routing](#).

ADDITIONAL NOTES / REFERENCES

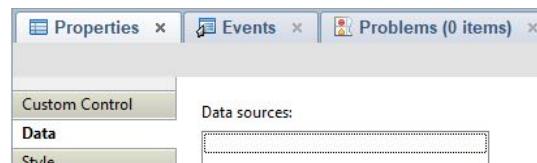
Chapter 5 – Content: Managing Data

5.1) General

This chapter addresses document content - the information to be routed in the process. Described in detail in the previous chapter, Workflow Ascendant uses a system to facilitate controlling who can modify which portions of a document in addition to what information the document must contain. This chapter exposes the mechanics of that system as well as walk through various data structures commonly found in workflow documents:

- Various field types
- Simple dynamic lists
- Tiered dynamic lists
- Tables
- Bar Charts
- Gantt Chart
- Selective visibility

Custom Control zcontent DocFields contains the basic XPages field types that are available. If you are not familiar with XPages, you may want to consider coping/pasting fields from there into your Custom Control along with the “red circles” in order to take advantage of the Workflow Ascendant Error Handling mechanism. That, of course, is your choice. If you do choose to take components directly from the *Controls* menu, take care to ensure that you do not have any *Data sources* specified when you save the Custom Control.



No *Data sources* specified. In the Workflow Ascendant design schema, no “content” Custom Control (i.e., those contained in a workflow document) should contain a data source.

It is recommended that you create new XPages and Custom Controls from existing ones. From there it is a relatively straightforward process to change the names referenced therein in the XML Source panes/tabs.



The Design and Source panes. This example is taken from the context of creating new XPage *Document02* from *Document01*.

5.2) Field Types

PURPOSE

There is a variety of field types at your disposal. Notes Form *Document02 Tab 2* and XPage *Tab 2* (Custom Control *zcontent_DocFields*) contain the primary / most frequently used ones that you can copy and paste from.

WHAT IT LOOKS LIKE

Field Type	Description	Value
Edit Box	My Label Edit Box	Text input field with placeholder "r1" and "r2".
Multiline Edit Box	Multiline Edit Box	Large text area with scroll bars.
List Box	Choice A Choice B Choice C	List box containing three items: Choice A, Choice B, and Choice C.
Combo Box	Combo Box	Combo box dropdown menu.
Check Box	Check Box	Check box labeled "Static Item 1" and "Static Item 2".
Radio Button	Radio Button	Radio button group with items "Static Item A", "Static Item B", and "Static Item C".
Date Time Picker	Date Time Picker	Date time picker input field with calendar icon.
Value Picker	Value Picker	Value picker input field with magnifying glass icon.
Name Picker	Name Picker	Name picker input field with file icon.
File Upload/Download	File Upload/Download	File upload/download input field with "Choose File" button and message "No file chosen".

HOW TO MAKE IT HAPPEN

Field Type	Description	Value
Edit Box	My Label Edit Box	Text input field with placeholder "MyEditText".
Multiline Edit Box	Multiline Edit Box	Large text area with scroll bars.
List Box	List Box	List box containing the value "MyListBox".
Combo Box	Combo Box	Combo box dropdown menu with value "MyComboBox".
Check Box	Check Box	Check box labeled "MyCheckBox".
Radio Button	Radio Button	Radio button labeled "MyRadioButton".
Date Time Picker	Date Time Picker	Date time picker input field with value "MyDateTimePicker".
Value Picker	Value Picker	Value picker input field with value "MyValuePicker".
Name Picker	Name Picker	Name picker input field with value "MyNamePicker".
File Upload/Download	File Upload/Download	File upload/download input field with value "MyFileUpload".

ADDITIONAL NOTES / REFERENCES

5.3) Fields

Notes

Properties pane (Edit Box):
 Name: Title
 Data: Height:
 Validation: Units:

Properties pane (Label):
 Name: Title_E
 Style: Label:
 Font: Height:
 Background: Width:
 Margins: Accelerator:
 All Properties: Visible (Computed):
 Local custom formatting: Family: Wingdings, Font: Wingdings, Size: 11, Color: Red
 Script Editor: Outline Reference, Language: JavaScript (Server Side), Condition: Compute Dynamically: isRedCircleError(this.getId())
 function isRedCircleError(errorFieldName:String) {
 var fieldName = errorFieldName.substring(0, errorFieldName.length - 2)
 return @IsMember(fieldName, viewScope.get("waErrorFieldNames"))
 } [Script library waMinimum]

Notes pane (Outline):

Title	Title	•
Total	Total	•
Field 1:	Field01	•
Field 2:	Field02	•

XPages

Properties pane (Label):
 Name: Title_E
 Style: Label:
 Font: Height:
 Background: Width:
 Margins: Accelerator:
 All Properties: Visible (Computed):
 Local custom formatting: Family: Wingdings, Font: Wingdings, Size: 11, Color: Red
 Script Editor: Outline Reference, Language: JavaScript (Server Side), Condition: Compute Dynamically: isRedCircleError(this.getId())
 function isRedCircleError(errorFieldName:String) {
 var fieldName = errorFieldName.substring(0, errorFieldName.length - 2)
 return @IsMember(fieldName, viewScope.get("waErrorFieldNames"))
 } [Script library waMinimum]

Notes pane (Outline):

Title	Title	•
Total	Total	•
Field 01	Field01	•
Field 02	Field02	•

Workflow

Notes pane (Value):

Description	Value
Title	Title
Total	Total
Field 01	Field01
Field 02	Field02

Notes pane (Field):

Name: Title_E	Type: Text	Computed
Font: Tw Cen MT Condensed, Size: 12, Style: Plain, Color: Red		

Notes pane (Field):

Name: Title_E	Type: Text	Computed
Font: Tw Cen MT Condensed, Size: 12, Style: Plain, Color: Red		

NOTES

5.4 Panels / Sections

XPage → Document01

Custom Controls

```

waLayoutWFDoc01
content_DocWF01
content_DocWF01TabWF
content_DocWF01Tab01
content_DocWF01Tab02
content_DocWF01Tab03
...
content_DocWF01Tab10
content_DocWF01TabComments
content_DocWF01TabHistory

```

waMinimum.jss provides access to field level routines such as the error handling mechanism

isTabReadOnly provides modification controls to all fields in that panel (if used)

Properties

Name: Tab03

Height: Units: ◊

Width: Units: ◊

Visible:

Read-only (Computed) ◊

Language: JavaScript (Server Side)

Condition:

Compute Dynamically Compute on Page Load

isTabReadOnly(this.getId())

Workflow | Tab 1 | Tab 2 | Tab 3 | Tab 4 | Commentaires | Historique |

Description	Value
Title	: Title T
Total	
Field 01	
Field 02	

Form Section

Type: Computed for display

```

EditorList := "[CEO]" : "[WAManager]";
@if (@IsNotMember(@UserName; CEO); EditorList; @UserName : EditorList)

```

Field 05
Field 06
Access Formula

NOTES

5.5) Document Layouts

Newly created workflow docs will be created using this version of the **State** documents

The workflow document is initialized here

```
var doc:NotesDocument = document1.getDocument(true)
var agent:NotesAgent = database.getAgent("(waInitializeWorkflowEng")
agent.runWithDocumentContext(doc)
```

The workflow document is "sent" here

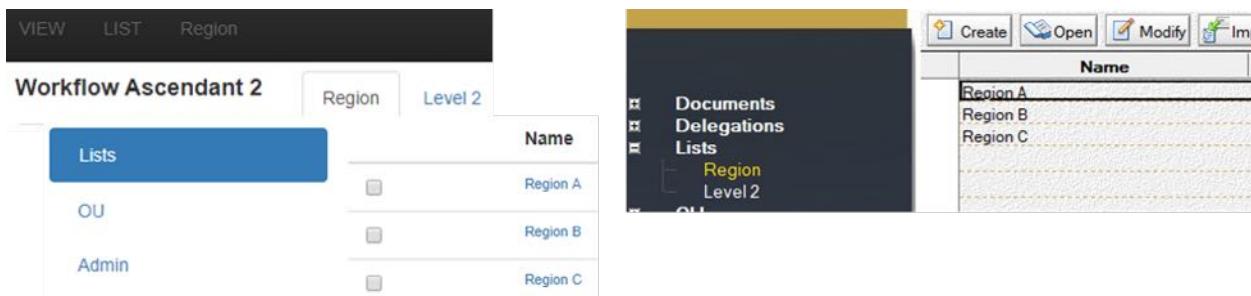
```
default:
var docVirtual = database
var docVirtualHolderAgent
doc.copyAllItems(docVirtual)
docVirtual.replaceItemValue
docVirtualHolderAgent.rur
viewScope.waErrorMessage
viewScope.waErrorLogAdmin
```

5.6) Simple List Creation

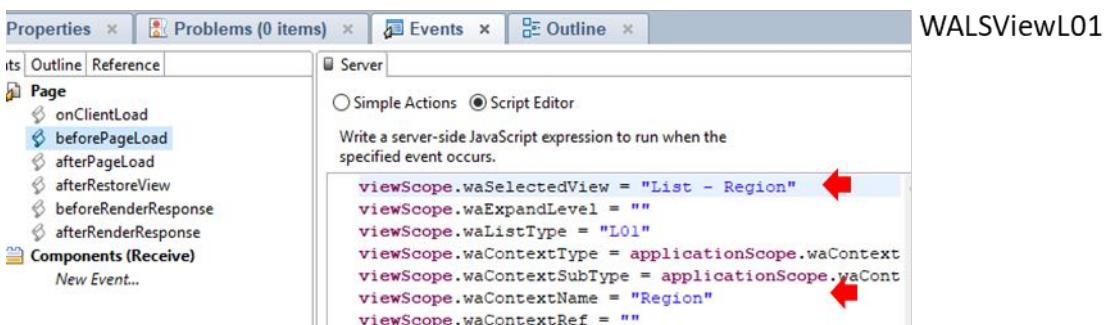
PURPOSE

Providing lists for users to select from minimizes data entry error. Making those lists dynamic (i.e., easily modifiable) facilitates application maintenance. See Section [5.7 Simple List Usage](#) for how to make these lists available for user selection in the application. This example converts generic “List 1” to “Region”.

WHAT IT LOOKS LIKE



HOW TO MAKE IT HAPPEN



waLayoutLSView

WALSViewL01



```
viewScope.waContextSubType = applicationScope.waContextSubType
viewScope.waContextName = "Region"
viewScope.waContextRef = ""
```

WALSDocL01

5.7) Simple List Usage

PURPOSE

Providing lists for users to select from minimizes data entry error. Making those lists dynamic (i.e., easily modifiable) facilitates application maintenance and minimizes user data entry errors. See Section [5.6\) Simple List Creation](#) for how to create these lists. This can be seen in action by creating a document in process *DOC212 (Document02 Tab 3)*. This example converts generic “List 1” to “Region”.

WHAT IT LOOKS LIKE

Simple

Region A
Region B
Region C

Tab 1 | Tab 2 | Tab 3 | Tab 4 | Tab 5 | Tab 6 | Comments | Historical |

Description: Simple List Selection

Value: Region A

HOW TO MAKE IT HAPPEN

Workflow | Tab 1 | Tab 2 | Tab 3 | Tab 4 | Tab 5 | Tab 6 | Comments | Historical |

Description: Simple List Selection

Value: MyListName

Field

Name: MyListName

Type: Combobox

Properties

Values

Choices

Use formula for choices

catParent = "Region";
@DbLookup("Notes", "NoCache",
@DbName; "(List Type 1)", catParent;
"ListName01")

Script Editor:

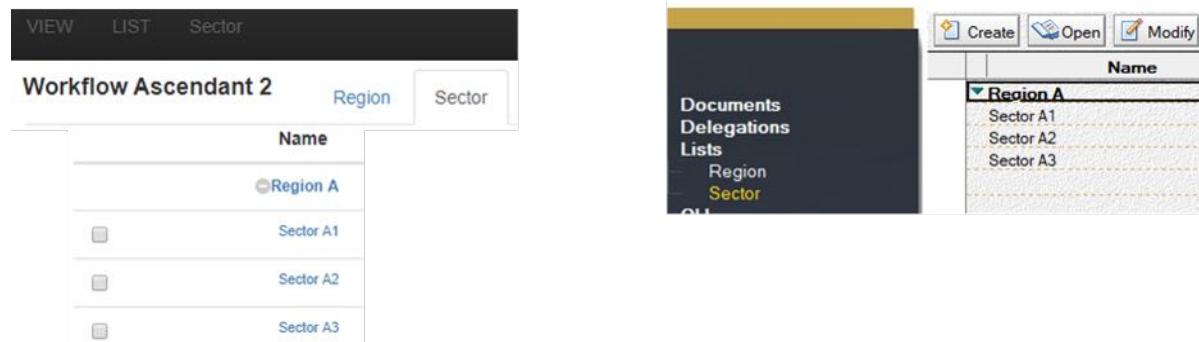
```
① Compute Dynamically ② Compute on Page Load
var categoryParent = "Region"
@DbLookup(@DbName(), "(List Type 1)", categoryParent, "ListName01")
```

5.8 Tiered List Creation

PURPOSE

Providing lists for users to select from minimizes data entry error. Making those lists dynamic (i.e., easily modifiable) facilitates application maintenance. See Section [5.9\) Tiered List Usage](#) for how to make these lists available for user selection in the application. This example converts generic “List 2” to “Sector”.

WHAT IT LOOKS LIKE



HOW TO MAKE IT HAPPEN

5.9) Tiered List Usage

PURPOSE

Providing lists for users to select from minimizes data entry error. Making those lists dynamic (i.e., easily modifiable) facilitates application maintenance and minimizes user data entry errors. See Section [5.8 Tiered List Creation](#) for how to create these lists. This can be seen in action by creating a document in process *DOC212 (Document02 Tab 3)*. This example converts generic “*List 2*” to “*Sector*”.

WHAT IT LOOKS LIKE

Level 1	Region A
Level 2	Sector A1
	Sector A1
	Sector A2
	Sector A3

Tiered List Selection 1	Region A
Tiered List Selection 2	Sector A2
	Sector A1
	Sector A2
	Sector A3

HOW TO MAKE IT HAPPEN

Workflow | Tab 1 | Tab 2 | Tab 3 | Tab 4 | Tab 5 | Tab 6 | Comments | Historical |

Description	Value
Simple List Selection	MyListName
Tiered List Selection 1	MyListName01
Tiered List Selection 2	MyListName02

Use formula for choices
catParent := "Region";
@DbLookup("Notes","NoCache";
@DbName;"(List Type 1)"; catParent;
"ListName01")

Use formula for choices
catParent := "Sector" + " - " +
MyListName01;
@DbLookup("Notes","NoCache";
@DbName;"(List Type 2.1)";
catParent; "ListName02")

Client Server

Simple Actions Script Editor

Write a client-side JavaScript expression to run when the specified event occurs.

```
XSP.getElementById("#{id:MyListName01").value =
XSP.getElementById("#{id:MyListName01_D").value
```

Bind data using:

Simple data binding JavaScript Advanced

Advanced

Use:

Scope: Application Scope
Session Scope
Request Scope
View Scope

Variable name: MyListName01

Compute dynamically Compute on page load

Default value: **{Computed}**

Compute Dynamically Compute on Page Load

```
var doc:NotesDocument = document1.getDocument(true)
getComponent("MyListName01").value
```

Compute Dynamically Compute on Page Load

```
var categoryParent = "Sector" + " - " + viewScope.get("MyListName01")
@DbLookup(@DbName(), "(List Type 2.1)", categoryParent, "ListName02")
```

Values

Add Item Add Formula Item... Import List... Edit... Remove

Label	Value
{ Computed Items }	{ Computed Items }
{ Computed Items }	{ Computed Items }

5.10) Tables

PURPOSE

Workflow Ascendant provides a convenient way to insert tables into applications. Insert the matching Custom Control and Subform into the desired panels/tabs of the application and set the configuration fields to display the table accordingly. To note that obligatory fields must be of the format "T01_DBField04" for table 1, column 4 (example). This can be seen in action by creating a document in process *DOC211 (Document01 Tab 6)*.

WHAT IT LOOKS LIKE

The screenshot shows a table editor interface on the left and a populated table view on the right.

Table Editor (Left):

- Top navigation: Tab 1, Tab 2, Tab 3, Tab 4, Tab 5, Tab 6, Comments, Historical.
- Panel title: **Populate Table** (Set Display Row first).
- Buttons: +, -, ▲, ▼, ×.
- Sub-sections: Hidden Fields, Profile 1, Profile 2.
- Table header: #, Col 1, Col 2, Col 3, Col 4, Col 5, Col 6, Col 7, Col 8, Col 9, Col 10.
- Data rows (Profile 1): 1, 0101, 0102, 0103, 0104, 0105, 0106, 0107, 0108, 0109, 0110.
- Data rows (Profile 2): 2, 0201, 0202, 0203, 0204, 0205, 0206, 0207, 0208, 0209, 0210.
- Buttons: Delete, Move Up, Move Down, Store, Clear.
- Page navigation: <, 1, 2, 3, 4, >.
- Table view (Bottom): Rows 1, 2, 3 with columns Col 1 through Col 10.

Populated Table View (Right):

#	Col 1	Col 2	Col 3	Col 4	Col 5	Col 6	Col 7	Col 8	Col 9	Col 10
1	0101	0102	0103	0104	0105	0106	0107	0108	0109	0110
2	0201	0202	0203	0204	0205	0206	0207	0208	0209	0210
3	0301	0302	0303	0304	0305	0306	0307	0308	0309	0310

Text: *Populate Table* is a mechanism to automatically fill in the table (for testing purposes only)

HOW TO MAKE IT HAPPEN

The diagram illustrates the components and their relationships:

- Custom Control:** *content_DocWFTable01* (represented by a blue box).
- Subform:** *content_DocWFTable01* (represented by a red box).
- Configuration Panels:**
 - Content Panel:** Shows the **Populate Table** configuration (Set Display Row first), **Hidden Fields**, and a table definition with columns labeled T01_Labels_T, T01_EntriesCurrent_#, T01_EntriesMaxRows_#, and T01_EntriesMaxCol_#.
 - Profile 1:** Shows the **Obligatory Fields** configuration (T01_Obligatory01_T).
 - Profile 2:** Shows the **Labels** configuration (Col 1 through Col 10).

5.11) Bar Charts

Bar Charts is a generic mechanism to display statistics graphically. The example below provided by default will produce a bar chart displaying statistics on users who exceed their allotted time to intervene in workflow documents. Intermediate documents are created in view *Chart Data\Count 01* from the workflow documents which, in turn, are used to generate the graphics (this to optimize performance for end users). Agent *WA Update Chart Docs Count01* creates those documents nightly, but they can also be updated manually by [WA Manager]. Create additional statistics by adding the relevant information to the [WA Language](#) document, creating the new view and adding the relevant routines (corresponding to *UpdateChartDataCount01* and *ChartSetCount01*) in script library *WA Chart*.

ACTIONS (ACTIVATE)	
Field Names	
WADelayIcon	150
WAChartCount01	WAChartCount01 : WACurrentAuthors

This [Time Trigger](#) Action adds all the current authors of a workflow doc to field **WAChartCount01** when the allocated time has been

Chart Alias	Chart XPage	Chart View (Data)	Text (X Axis)	Text (Y Axis)
*1 Scheduled vs Actual	WACHPageGanttSvA	Chart Data - Days by User	Tasks	Date
*2 Percent Complete	WACHPageGanttPC	Chart Data - Days by User	Tasks	Date
3 Days by user	WACHPageBarDbU	Chart Data - Days by State	Users	Days taken to intervene
4 Days by state	WACHPageBarDbS	Chart Data - Count 01	States	Days taken to intervene
5 Delay exceeded by user	WACHPageBarC01		Users	Late warnings emitted
6				
7				

WFCApplication02.nsf - Views x *Chart Data\Count 01 - View x

Name
orange

- Open
- Modify
- Print
- Import
- Export
- Update

Update (Action) : Click

Run Client

```
Sub Click(Source As Button)
    Call UpdateChartDataCount01()
End Sub
```

Chart Data\Count 01 (View) : View Selection

Run Client Formula

```
SELECT (( Form = "WA Chart" ) & ( Category = "Count Delay by User" ))
```

(WA Update Chart Docs Count01) - Ag... x

Initialize

```
Sub Initialize
    Call UpdateChartDataCount01()
End Sub
```

Scheduled

(WA Update Chart Docs Count01 - Agent x

Initialize

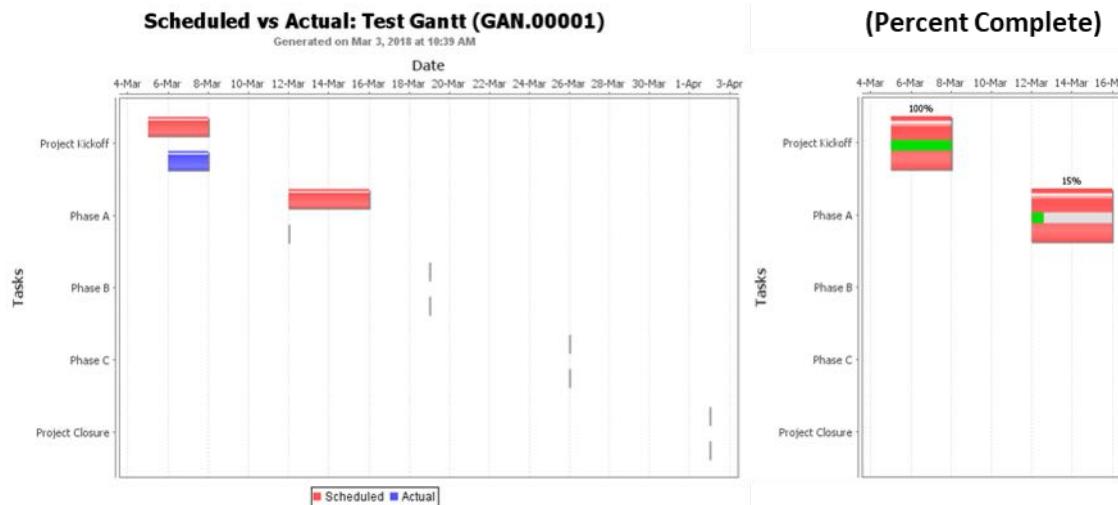
```
Sub Initialize
    Call UpdateChartDataCount01()
End Sub
```

5.12) Gantt Charts

PURPOSE

Gantt Charts is a plug-and-play mechanism to display project milestone progress graphically. To that end two different charts are provided: by date and by % progress. In the example below, a document in process *DOC213* (*Document02* - reference the [Language document](#)) is configured to produce the below Gantt chart.

WHAT IT LOOKS LIKE



HOW TO MAKE IT HAPPEN

To render this functionality operational, the following needs to take place:

- Create the [Gantt Task Name](#) documents in view *Workflow - Gantt Tasks*
- Insert Subform *content_DocWFGantt* into the Notes form (*Document01* for example)
- Insert Custom Control *content_DocWFGantt* into the desired panel of *content_DocWF01* (example)
- In state *\$created\$* (example), insert the initialization routine *#walnitGanttFields*.
- Use the provided input mechanisms to modify all default dates (01-Jan-00) accordingly - this in turn will change the ready indicator from yellow to green which allows the chart to display

Task Name	Start Scheduled	Start Actual	End Scheduled	End Actual	% Complete
Project Kickoff	05-Mar-18	06-Mar-18	08-Mar-18	08-Mar-18	100
Phase A	12-Mar-18	12-Mar-18	16-Mar-18	12-Mar-18	15
Phase B	19-Mar-18	19-Mar-18	19-Mar-18	19-Mar-18	0
Phase C	26-Mar-18	26-Mar-18	26-Mar-18	26-Mar-18	0
Project Closure	02-Apr-18	02-Apr-18	02-Apr-18	02-Apr-18	0

ADDITIONAL NOTES / REFERENCES

5.13) Panel/Tab Visibility

PURPOSE

There are times when some portions of a document need to be selectively displayed depending on the user's profile. To note that the mechanisms for a Web client and the Notes client are independent. In example *DOC214* below, only *CEO* and *[WAManager]* can view Tab 6.

WHAT IT LOOKS LIKE



HOW TO MAKE IT HAPPEN

The screenshot shows the configuration of a tab panel in the IBM Designer interface. The top navigation bar includes tabs for '01 - Custom Control' and 'waLayoutWFDoc02 - Custom Control'. Below the tabs are toolbars for 'Problems (0 items)', 'Events', and 'Outline'.

The main workspace displays the configuration of a tab panel:

- Title text:** {Computed}
- Tabs:** A list of tabs including 'Basic Node - Tab 1' through 'Basic Node - Tab 10'. 'Basic Node - Tab 6' is selected and highlighted in grey.
- Property Editor:** Shows properties for the selected tab:
 - Property: enabled, Value: true
 - Property: href, Value: (empty)
 - Property: image, Value: (empty)
 - Property: imageAlt, Value: (empty)
 - Property: imageHeight, Value: (empty)
 - Property: imageWidth, Value: (empty)
 - Property: label, Value: Tab 6
 - Property: loaded, Value: (empty)
 - Property: onClick, Value: (empty)
 - Property: rendered, Value: @IsMember(@UserName(), "CEO") || @Contains(@UserRoles; Roles) | @IsMember(@UserName; WAManager)
 - Property: role, Value: (empty)
- Condition:** Set to 'Compute Dynamically'. The condition formula is:

```
!IsMember(@UserName(), "CEO") || !context.getUser().getRoles().contains("CEO") || !context.getUser().getRoles().contains("WAManager")
```
- Workflow Tab View:** Shows the tabs 'Workflow', 'Tab 1', 'Tab 2', 'Tab 3', 'Tab 4', 'Tab 5', 'Tab 6', 'Comments', and 'Historical'. 'Tab 6' is highlighted in yellow.
- Tab06Visible (Field) : Value:** A dialog box showing the formula for tab 6 visibility:

```
Run Client Formula  
Roles := "[CEO]" : "[WAManager]";  
@Contains(@UserRoles; Roles) | @IsMember(@UserName; CEO)  
✓ Hide paragraph if formula is true Formula Window  
! Tab06Visible
```

ADDITIONAL NOTES / REFERENCES

5.14) Document Visibility

PURPOSE

There are times when some documents need to be selectively displayed depending on the user's profile. To note that there is one mechanism that works for both a Web client and the Notes client. In example *DOC215* below, users can only see documents that are assigned to them and that progressively as documents advance in the process. Note that *[WAManager]* and *[WASupervisor]* can see all documents at all times due to the initial assignment in state \$created\$.

WHAT IT LOOKS LIKE

Reference ^	Title ^	Process ^	Current State ^
orange			
DVS.00003	Doc Visibility	DOC215	Manager

User *a1* creates the document

Reference ^	Title ^	Process ^	Current State ^
orange			

Another user (*b1*) can't see the document
Director (red) can't see the document yet

Reference ^	Title ^	Process ^	Current State ^
orange			
DVS.00003	Doc Visibility	DOC215	Manager

Manager (orange) advances the document
Director (red) can now see the document

HOW TO MAKE IT HAPPEN

The screenshot shows a 'STATE' section with a table:

Version	Form Name	State Name
V01	DOC215	\$created\$

Below the table is a navigation bar with links: Workflow, Notifications, Actions, Documentation.

Underneath is an 'ACTIONS (ACTIVATE)' section with a table:

#	Field Names	Field Values*
1	WAReaders	@Unique(WAReaders : @UserName) : "[WAManager]" : "[WASupervisor]"

A red arrow points from the 'Field Names' column to the 'Field Values' column. Below the table is another row:

WAReaders	@Unique(WAReaders : @UserName)
-----------	--------------------------------

To the right of this row is the text: 'Actions for all other states when the document is advanced'

ADDITIONAL NOTES / REFERENCES

Reference [Section 2.14](#) for explications regarding specifying Actions in [State documents](#).

Chapter 6 – General References

6.1) General Web Interface

The screenshot shows the 'Workflow Ascendant 2' interface. At the top, there's a navigation bar with 'VIEW', 'DOCUMENT', 'Current By RI', 'Context' (with a red arrow pointing to it), 'Home', 'black', and 'Logout'. Below the navigation is a toolbar with 'Workflow Ascendant 2', 'Drafts', 'Current By RI' (highlighted in red), 'Current Author', 'All', 'Children', 'Sort', 'Archived', 'View selection' (with a red arrow pointing to it), 'Archived Child', 'Collapse All', and 'Create ▾'. A sidebar on the left lists 'Delegations', 'Charts', 'Lists', 'OU', 'Admin', and a section labeled '*** Reserved visibility (admin)**' with a red asterisk. The main area is titled 'Workflow document creation'. It contains a search bar ('Search...') and a table with columns: Reference ▾, Title ▾, Process ▾, Current State ▾, Date ▾, Cur ▾, Total ▾, ! ▾, and Author ▾. The table has three sections: 'e1' (yellow background), 'e2' (white background), and 'orange' (orange background). The 'orange' section contains a row for 'ROC.00021' with a 'Past due alert' message. Red annotations include: 'Workflow document creation' at the top right; 'Process name', 'Days at current state', and 'Total days' under the table headers; 'Unique document reference' and 'Users currently required to intervene' below the table; and a red circle around the exclamation mark in the 'orange' row.

Reference	Title	Process	Current State	Date	Cur	Total	!	Author
e1 IRC.00010	Inquiry Status	DOC203	Production	04-03-2018	2	2	yellow	
SST.00009	Purchase Order (Office)	DOC207	State 03	05-03-2018	1	1	green	
e2 IRC.00010	Inquiry Status	DOC203	Production	04-03-2018	2	2	yellow	
SST.00009	Purchase Order (Office)	DOC207	State 03	05-03-2018	1	1	green	
orange ROC.00021	Project A	DOC202	Manager	03-03-2018	3	3	! black	

ADMIN INTERFACE

The screenshot shows the 'Admin Interface' of 'Workflow Ascendant 2'. At the top, there's a navigation bar with 'VIEW', 'DOCUMENT', 'Current By RI', 'Home', 'black', and 'Logout'. Below the navigation is a toolbar with 'Workflow Ascendant 2', 'Current By RI' (highlighted in red), 'All Docs', 'Chart Data', and a red annotation 'Force agents to run immediately'. The main area has a search bar ('Search...') and several management buttons: 'Send Email', 'Copy Docs', 'Date ▾', 'Run Agent ▾', 'Delete', 'Collapse All', and 'Language ▾'. Red annotations include: 'Manually send email reminders' above the toolbar; 'Simulate the passage of time (for testing)' and 'Delete documents' above the bottom buttons; and 'Change the language' next to the 'Language ▾' button.

6.2) Notes Admin Interface

The various graphics below present the development administration interface as it relates to managing the process.

Horizon Ascendant WA Application 02

Constraints, Events, Content

The date today is Wednesday
You do not have any documents awaiting

Active Workflow Version

General | Documents | ACL Options | Greetings | Notifications | Buttons | Forms | Dialogboxes | Version

#	Alias	Form Name
1	DOC201	Document01
2	DOC202	Document01
3	DOC203	Document01

Version

- V01
- V01
- V01

State Docs (Processes)

	State ^
V01	Archived
DOC201	Director
Manager	Manager
Rejected	Rejected
To be modified	To be modified
Withdrawn	Withdrawn
Screated\$	Screated\$
DOC202	Archived
Director	Director
Manager	Manager
Rejected	Rejected

Field Docs (Constraints)

	Field Name ^
V01	DOC201
Director	Director
Manager	Manager
WAAuthor	WAAuthor
DOC202	DOC202
Director	Director
Manager	Manager
WAAuthor	WAAuthor
DOC203	DOC203

Reference Docs

	State Start ^	Prefix ^	Next Ref ^
V01	DOC201	Screated\$	"FDC."
DOC202	DOC202	Screated\$	"ROC."
DOC203	DOC203	Screated\$	"IRC."

Role Docs * (independent of version)

	Responsible ^
[CEO]	blue
[Director]	red
[Manager]	orange
[Marketing]	yellow
[Production]	e1,e2
[Sales]	green

Trigger Docs * (Time related events)

	State Start ^	State End ^	Trigger ^
V01	DOC202	-	3
Manager	Manager	-	5
CEO	CEO	-	3
DOC211	DOC211	-	3

Gantt Docs * (Gantt charts)

	Task Name ^
V01	DOC212
Project Kickoff	Project Kickoff
Phase A	Phase A
Phase B	Phase B
Phase C	Phase C
Project Closure	Project Closure

* optional / as needed

6.3 Workflow Document

HORIZON ASCENDANT

DOCUMENT WORKFLOW DOC211 - \$created\$ Tab 1 **Context** Error Display Home black Logout

Workflow Ascendant 2 Tab 1 Tab 2 Tab 3 Tab 4 Comments Historical Fields marked with a red circle must contain identical values!

Navigation Bar

Action Bar Cancel Save Send ▾

Documents	Title	Test
Delegations	Total	0
Charts	Field 1	aaa
Lists	Field 2	bbb
OU	Type	
Admin		

Main Document (Tab 1)

black *Author* Refer to Tab 3 for specific forecasting information.

Manager My comments...]

Contributor	Date	Description	Days
yellow	04-03-2018	Production	0
e1	06-03-2018	Director	2
<Current State>			0
Total			2

WEB CLIENT

Action Bar

HORIZON ASCENDANT

Context Reference CFV.00027
Current State Archived
Document Type DOC211

Tab 1 | Tab 2 | Tab 3 | Tab 4 | Comments | Historical | **Navigation Bar**

Description	Value
Field 03	R1
Field 04	R2

Main Document (Tab 2)

**NOTES
CLIENT**

6.4) Delegation Document

Workflow Ascendant provides real-time delegation. Users create a Delegation document for themselves indicating the time frame of their absence along with the person to be designated to. The database manager can create Delegation documents for others. When the delegation becomes effective, the delegated to party receives an email to that effect (and vice-versa when the delegation period has passed).

The screenshot shows the Workflow Ascendant application interface. At the top, there is a navigation bar with links for DOCUMENT, DELEGATION, Context, Error Display, Home, and Logout. The main area is titled "Workflow Ascendant 2". A message in red text says "You must not specify an end date prior to the start date!". Below this, there is a form for creating a delegation:

Documents	Author	red/Horizon
Delegations	Replacement	blue/Horizon
Charts	Start Date	3/6/2018
	End Date	3/2/2018

Below the form, there is a sample email message:

Delegation activated for red
black
To: blue
Cc: red

Saturday, March 03, 2018 02:01PM
Show Details

Welcome, blue. **Sample Email sent**

The date today is Monday, 5 March 2018.
You have been delegated responsibilities for red (Workflow Ascendant 2 - until 08-03-2018 12:00:00 PM).
You have 1 document awaiting your intervention.
You can open this database by selecting the following link: <click here>.

On the right side of the screen, there are two callout boxes:

- Note that [WAManager] can modify the Author field (above) to create Delegation documents for other users
- While the agent to enact delegation normally executes at night, the database manager can activate this manually to take immediate effect

At the bottom, there is a footer with links for Pending, Active, Archived, Create, Delete, and Run Agent. The "Run Agent" button is circled in red.

6.5) Admin ACL Entry Document

ACL Entry documents provide a centralized access to the database global access rights. Any changes you make here should be followed by selecting the *Update ACL* button. You will want to set the *Server* document to the name of your server and the *Managers* document with the names of all those required to manage the application. For application specific roles, reference [Section 6.10](#). To note for Workflow Ascendant to properly control who can modify a document at a given point in the process, those who intervene must be set access level *Author* (the default as set below).

The screenshot shows the Horizon Ascendant interface. On the left, a sidebar lists various document types: Documents, Delegations, Lists, OU, Chart Data, and Workflow. Under Workflow, 'ACL Entries' is selected, indicated by a red arrow. The main area contains a table titled 'Select to affect changes' with columns: Entry Name, Access Level, Members Type, Optional Roles, and Members. The table rows are:

Entry Name	Access Level	Members Type	Optional Roles	Members
Default-	Author	All Authenticated Users		
Anonymous	No Access	All Users		
Server	Manager	Server Name Only		Workflow
Managers	Manager	Users & Groups		black,LocalDomainAdmins
Editors	Editor	None		
Readers	Reader	None		[WASupervisor]
Authors	Author	All Authenticated Users		

Below the table is a 'Modify' button. A red arrow points from the 'Managers' row in the table to a detailed view window. This window has tabs 'Exit' and 'Modify' (the latter is selected). The detailed view shows the following fields:

TYPE	ACL Entry
Name	Managers
Access Level	Manager
Roles	[WAManager] [WASupervisor]
Members Type	Users & Groups
Members	black/Horizon LocalDomainAdmins

6.6) Admin Field Document

Each constraint used in a given workflow must contain a corresponding Field document for the delegation function to work properly. As in most Workflow Ascendant Admin documents, these are defined by *Version* and *Form Name*. For processes already in production, any changes to this list should only be done in the context of a new workflow version (e.g., V02).

The screenshot shows the Admin Field Document interface. On the left is a navigation sidebar with options like Documents, Delegations, Lists, OU, Chart Data, Workflow (with sub-options like ACL Entries, All Admin, Fields), Gantt Tasks, and Languages. A red arrow points from the 'Fields' option in the sidebar to a table on the right. The table has columns for Field Name and Description. It shows a hierarchy under 'V01': 'DOC201' has entries for Director, Manager, and WAAuthor; 'DOC202' has entries for Director and Manager; 'DOC203' has an entry for Director. Another red arrow points from the 'Fields' table to a detailed view below. This detailed view includes a 'FIELD' header table with columns for Version, Form Name, and Field Name, all set to 'V01', 'DOC201', and 'Director'. Below this is a 'General' tab containing two rows: 'Description' with 'Director' and 'Members' with a dropdown menu. At the bottom, there's a 'NOTES' section with a note about 'Members' and a 'waSetUsersField' state document.

Field Name	Description
▼ V01	
▼ DOC201	Director Manager WAAuthor
▼ DOC202	Director Manager
▼ DOC203	Director

FIELD		
Version	Form Name	Field Name
V01	DOC201	Director

General

Description	Director
Members	<input type="button" value="▼"/>

NOTES

* **Members**: User names set in this field will automatically be set in the corresponding workflow document field upon document creation provided that you include `#waSetUsersField` in State document `$created$`. Do not put user names here if you are using `#waSetUsersRole` as user names set here will override those in the Role documents.

Use *Members* in conjunction with `#waSetUsersField` to initialize your constraint fields (i.e., who performs which roles in the

Changes made to Field documents while workflow docs are in production (same version, same process) may result in application failure.

6.7) Admin Gantt Task Document

Gantt Task documents form the task list to be used in creating Gantt charts. Use these in conjunction with Subform *content_DocWFGantt* and Custom Control *content_DocWFGantt*. For a chart to be rendered displayable, all default dates (01-01-2000) must be set to a different value (which will turn the ready indicator from yellow to green). As in most Workflow Ascendant Admin documents, these are defined by *Version* and *Form Name*. As these documents are only accessed upon workflow document creation, any changes to this list will not require enacting a new workflow version (e.g., V02).

Horizon Ascendant
WA Application 02
Constraints, Events, Content

Documents Delegations Lists OU Chart Data Workflow
ACL Entries All Admin Fields Gant Tasks Languages

Create Open Modify Collapse All

Task Name ^

V01

DOC213

Project Kickoff Phase A Phase B Phase C Project Closure

Exit Modify

GANIT

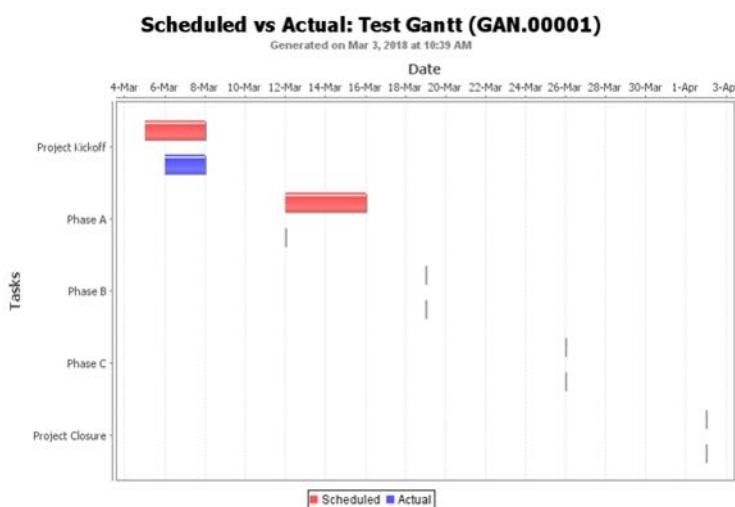
Version	Form Name	Task Name
V01	DOC213	Project Kickoff

General

Description Display Order

1.0

The screenshot shows the 'Gant Tasks' list and a corresponding GANTT chart. The list includes tasks like 'Project Kickoff', 'Phase A', 'Phase B', 'Phase C', and 'Project Closure'. The GANTT chart shows the scheduled and actual start and end dates for these tasks across a timeline from March 4 to April 3.



Use *Display Order* to specify the order in which tasks will be displayed in the view and in the corresponding Gantt chart. *Description* is solely included here for documentation purposes.

6.8 Admin Language Document

The active Language document dictates much of the behavior of Workflow Ascendant. The graphics included below illustrate options that affect basic operations. All other sections here provide you the opportunity to rename objects displayed in the application - or even create a new Language document to display all in the language of your choice.

Select to activate this document (obligatory)

WA Language (English)

General | Documents | ACL Options | Greetings | Notifications | Buttons | Forms | Dialogboxes | XPages | Charts |

URL Site (mime email): http://workflow.horizon.local/
 No Yes

Use MIME for emails:

Server Name:

Date Format: day-month-year month-day-year
 Mon Wed Fri Sun
 Tues Thur Sat

Days not to be counted: No Yes
 WAApplicationLog.nsf

Holidays not to be counted: No Yes
 None Normal Verbose

Log Database: WAApplicationLog.nsf
Logging Type: None Normal Verbose
Hide Workflow Tab: No Yes
Inhibit Deletions: No Yes
"Today": Today (set only if debugging): 14-01-2018 16

Holiday Date

#	Holiday Date	Holiday Description
1	16	<input type="radio"/>
2	16	<input type="radio"/>
3	16	<input type="radio"/>
4	16	<input type="radio"/>
5	16	<input type="radio"/>
6	16	<input type="radio"/>
7	16	<input type="radio"/>
8	16	<input type="radio"/>

Administration Options

Set to None if not debugging

General | Documents | ACL Options | Greetings | Notifications | Buttons | Forms | Dialogboxes | XPages | Charts |

What user sees: # Alias Form Name Version Hide Create Menu

#	Alias	Form Name	Version	Hide Create Menu
1	DOC201	Document01	V01	<input type="checkbox"/>
2	DOC202	Document01	V01	<input type="checkbox"/>
3	DOC203	Document01	V01	<input type="checkbox"/>

Notes Form name:
Active State docs:

Hide doc from Create menu if to be created indirectly (child doc)

General | Documents | ACL Options | Greetings | Notifications | Buttons | Forms | Dialogboxes | XPages | Charts |

Chart Alias	Chart XPage	Chart View (Data)	Text (X Axis)	Text (Y Axis)
*1 <input type="radio"/> Scheduled vs Actual	<input type="checkbox"/> GanttChartSchedActual	<input type="checkbox"/> Chart Data - Days by User	<input type="checkbox"/> Tasks	<input type="checkbox"/> Date
*2 <input type="radio"/> Percent Complete	<input type="checkbox"/> GanttChartPercentComp	<input type="checkbox"/> Chart Data - Days by State	<input type="checkbox"/> Tasks	<input type="checkbox"/> Date
3 <input type="radio"/> Days by user	<input type="checkbox"/> BarChartDaysByUser	<input type="checkbox"/> Chart Data - Count 01	<input type="checkbox"/> Users	<input type="checkbox"/> Days taken to intervene
4 <input type="radio"/> Days by state	<input type="checkbox"/> BarChartDaysByState	<input type="checkbox"/> Chart Data - Days by State	<input type="checkbox"/> States	<input type="checkbox"/> Days taken to intervene
5 <input type="radio"/> Delay exceeded by user	<input type="checkbox"/> BarChartCount	<input type="checkbox"/> Chart Data - Count 01	<input type="checkbox"/> Users	<input type="checkbox"/> Late warnings emitted
6 <input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7 <input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Add personalized chart statistics here

General | Documents | ACL Options | Greetings | Notifications | Buttons |

State Advance Notifications

cc:
bcc:

Subject: WAFormName + ". Intervention requested: " + @Char(34) + WADocRef + @Char(34)

Body: You are kindly requested to intervene in workflow dossier " + WADocRef + (" + WAFormName + ")."

 "For additional details, please select the following link:"

Doc Link: "[-- click here --]"

Verify Definitions

Information from the **Notifications** tab will be included in emails where you leave one or more of these fields empty in the State document. To note that text in blue is interpreted (i.e., these are executable statements). Select **Verify Definitions** to ensure that what you have specified is syntactically correct.

6.9) Admin Reference Document

Reference documents provide a means to allocate a unique and sequential reference to workflow documents. This ensures a consistent way to identify documents and verify that none are missing (note that a workflow document should *never* be deleted - only archived). References are virtually always required to be assigned to a workflow document when it is first launched into a process (as in the example below) but you can specify a different state if desired.

Process	Prefix	Next Ref	State Start
V01			
DOC201	FDC.	41	Screated\$
DOC202	ROC.	23	Screated\$
DOC203	IRC.	11	Screated\$
DOC204	FCN.	4	Screated\$
DOC205	RFC.	4	Screated\$
DOC206	ORG.	6	Screated\$
DOC207	SST.	10	Screated\$
DOC208	DIN.	1	Screated\$
DOC209	MOD.	14	Screated\$
DOC210	VAL.	13	Screated\$
DOC211	CFV.	28	Screated\$
DOC212	FLS.	5	Screated\$
DOC213	GAN.	3	Screated\$
DOC214	TAB.	1	Screated\$
DOC215	DVS.	4	Screated\$

REFERENCE	
Version	Form Name
V01	DOC201

Current State	Next State	#	Prefix	Length
Screated\$		41	FDC.	5

Reference ^	Title ^	Process ^	Current State ^
orange			
FDC.00040	Doc Reference	DOC201	Manager

In the above example, the next *DOC201* workflow document to be created and sent into the workflow will be allocated reference *FDC.00041*.

6.10) Admin Role Document

Role documents should generally be used in conjunction with Field documents. With the exception of the initial state, all constraints in the workflow must resolve to fields containing user names. To properly implement this Role-Field system, include `#waSetUserRole` in initial State document `$created$` and name the following identically:

- Field Doc. Example: `CEO`
- Role Doc. Example: `[CEO]`
- Field in the workflow document: `CEO` (multivalued: `Name` type in Notes, `Text` type in XPages)

In this example then, field `CEO` will automatically be set to `blue/Horizon` when the document is created, keeping in mind however that this information is taken from the Role document - not the ACL. Updating the ACL allows for proper handling of the initial state only.

The screenshot shows the 'Roles' tab of the Admin Role Document interface. At the top, there are buttons for Create, Open, Modify, and Update ACL. A red arrow points from the 'Select to affect changes' button to the 'Update ACL' button. The main table lists roles and their members:

Role	Members
(CEO)	blue
[Director]	red
[Manager]	orange
[Marketing]	yellow
[Production]	e1,e2
[Sales]	green

Below the table, the 'Fields' tab is open, showing the following configuration:

TYPE	Role
Scope	<input type="radio"/> Everyone <input checked="" type="radio"/> Only those below
Name	[CEO]
Members	blue/Horizon

At the bottom, the 'NOTES' section contains the following text:

General. The use of roles in these documents should be restricted to the following:
- individuals who can create workflow documents (defined in State document `$created$`)
- individuals who can intervene in documents not involving delegation (e.g., Purchasing, Procurement, etc.)

The **Update ACL** button only manages individuals of level Author.
Document visibility should be managed manually via a Group.

All other constraints should be of type Field.
All other rights should be managed via **Workflow - ACL Entries**.

Of course you can use roles to show/
hide various portions of your

[*] indicates all users in State

6.11) Admin State Document

A State document dictates how a workflow document is to respond at that state. A collection of State documents represents the application process. In the example below, the document is initialized by routine `#walnitModFields` when *Manager* opens the workflow document. In selecting the button *Send*, there are 3 choices to choose from: *To be modified*, *Rejected* and *Approved*. If the latter is selected and field *Total* in the workflow document is set to 1000 and routine `#waCntMandFields` does not flag an error (rule *b*), then the workflow document is updated from the *Actions* tab (field *CommentsLabel01A*, ...), the default email from the [Language document](#) is sent (as the *Subject* and *Body* fields are left blank) to those responsible to intervene in the next state (**N* = *Next*), and the document is routed to state *CEO*.

Exit	Modify	Verify												
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="4" style="text-align: center; background-color: #e0e0e0;">STATE</th> </tr> <tr> <th style="background-color: #e0e0e0;">Version</th> <th style="background-color: #e0e0e0;">Form Name</th> <th style="background-color: #e0e0e0;">State Name</th> <th style="background-color: #e0e0e0;">State Type</th> </tr> </thead> <tbody> <tr> <td>V01</td> <td>DOC104</td> <td>Manager</td> <td><input checked="" type="radio"/> Standard <input type="radio"/> Virtual</td> </tr> </tbody> </table>			STATE				Version	Form Name	State Name	State Type	V01	DOC104	Manager	<input checked="" type="radio"/> Standard <input type="radio"/> Virtual
STATE														
Version	Form Name	State Name	State Type											
V01	DOC104	Manager	<input checked="" type="radio"/> Standard <input type="radio"/> Virtual											
Workflow Notifications Actions Documentation														
GENERAL CONSTRAINTS														
	The following RIs can intervene...	And forward to the following states...	Which will be displayed as...	Parallel Operation	Extended Operation	Inclusive Operation	View Display	Historical						
1 2 a b	Manager Manager Manager Manager	To be modified Rejected Director CEO	<state> <state> Approved Approved	- - - -	- - - -	- - - -	<user> <user> <user> <user>	<state> <state> Approved Approved						
STOCKED PROCEDURES / AGENTS														
	The document will be initialized with the following stocked subroutine(s)...				The document will be blocked from advancing if one of the subroutines signals an error...									
1 2 a b	#walnitModFields <i>1, 2, ... - Manual Doc Routing</i> #walnitModFields <i>a, b, ... - Automatic Doc Routing</i>				- - #waCntMandFields #waCntMandFields									
AUTOMATIC ROUTING RULES														
	The following state will be routed to automatically...		If the following condition is met...											
a b	Director CEO		Total < 500 @True											
CHILD DOCUMENT CREATION (not shown) 														
Notifications Actions Documentation														
EMAIL NOTIFICATION RULES														
	To	cc	bcc	Subject*			Body*							
1	*N													
2	*A <i>*A – Author</i> <i>*N – Next RI to intervene</i>	WAHistoryAuthors		WAFormName + ". Dossier declined: " + @Char(34) + WADocRef + @Char(34) <i>(executable statements)</i>			-- "For information only. The dossier " + WADocRef + " (" + WAFormName + ") has been archived without further action." -- "For additional details please select the following link:"							
a b	*N *N													
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">CommentsLabel01B</td> <td style="width: 50%;">II Director</td> </tr> <tr> <td>b CommentsLabel01A CommentsLabel01B SectionComments03 CommentsLabel03A CommentsLabel03B</td> <td>@Name([CN]; @UserName) "Manager" CEO : "[WAManager]" "--" "CEO"</td> </tr> </table>									CommentsLabel01B	II Director	b CommentsLabel01A CommentsLabel01B SectionComments03 CommentsLabel03A CommentsLabel03B	@Name([CN]; @UserName) "Manager" CEO : "[WAManager]" "--" "CEO"		
CommentsLabel01B	II Director													
b CommentsLabel01A CommentsLabel01B SectionComments03 CommentsLabel03A CommentsLabel03B	@Name([CN]; @UserName) "Manager" CEO : "[WAManager]" "--" "CEO"													
Actions Tab <i>(example: Field CommentsLabel01B := "Manager")</i>														

6.12) Admin Time Trigger Document

Time Trigger documents define actions to be taken when a document resides in a state (or in a series of states) for a designated amount of time. In the example below, if a workflow document belonging to process *DOC202* remains in any state for 3 days, then an email is sent to those who haven't yet intervened (contained in field *WACurrentAuthors*) with *Director* on cc, an alert is set in the view (view document field *WADelayIcon*) and *WAChartCount01* is updated with the names of the “guilty parties” (a statistics monitor - you can create your own).

The screenshot shows the configuration of a Time Trigger for process *DOC202*. The interface includes:

- Left Sidebar:** Shows navigation links for Documents, Delegations, Lists, OU, Chart Data, Workflow, ACL Entries, All Admin, Fields, Gantt Tasks, Languages, References, Roles, States, State Links, Time Triggers, and Log.
- Top Bar:** Includes buttons for Create, Open, Modify, Collapse All, Expand All, and Zoom.
- Table View:** A hierarchical table showing states and triggers. It lists *V01*, *DOC202* (with Manager and Manager triggers), and *DOC211* (with CEO trigger). The CEO trigger for *DOC211* is highlighted with a red arrow pointing to the configuration details below.
- TIME TRIGGER Configuration:**

Version	Form Name	Document #	Description
V01	DOC202	1.0	

General | Notifications | Actions | Documentation |

CONTEXT

Start State	End State	State Change	Condition
Manager	-	-	@True

DETAILS

Trigger Type	Trigger Value	Agent to launch	Historical (User)	Historical (Object)
Days	3	-	n/a	n/a
- EMAIL NOTIFICATIONS:**

To	cc	bcc	Subject	Body
WACurrentAuthors	Director		WAFORMNAME + ". Intervention requested (PAST DUE): " + @Char(34) + WADocRef + @Char(34)	<p style="color: red;">(executable statements)</p> <p>"You have exceeded the intervene in this docume therefore requested to d earliest possible conveni ="</p> <p>"For additional details, pl following link:"</p>
- ACTIONS (ACTIVATE) & ACTIONS (DEACTIVATE):**

Field Names	Field Values
WADelayIcon WAChartCount01	150 WAChartCount01 : WACurrentAuthors

Actions Tab

Appendix A – Licensing

Workflow Ascendant is the proprietary software owned by Horizon Ascendant Inc, including any Documentation and any Support and Maintenance releases of the same Software. This software tool is used to create Business Process Management (BPM) applications. Your use of this Software and derived applications from the Software is subject to the terms and conditions of the **Workflow Ascendant Master Subscription License Agreement** (located on the Horizon Ascendant web site: www.horizonascendant.com). Please review the terms of this document carefully. By using the Software and/or derived applications, you agree to all of the terms contained therein.

This section is solely intended to highlight the financial conditions regarding the use of Workflow Ascendant.

Applications developed with Workflow Ascendant are licensed on a subscription basis. A separate license must be purchased for each nsf file which uses code from Workflow Ascendant: **95€ / month**.

Appendix B – Administration

TASKS

- **Modifying workflow documents data.** The Database Manager should be assigned role [WAManager] with access level *Manager*. Provided the application was developed following Workflow Ascendant recommendations (contained in this document), this user can modify any modifiable field in the document similar to the designated user in the workflow. **Keep in mind however that the Database Manager assumes by default all roles in the process, which means in the case where there are multiple users intervening simultaneously at a given state, this can have unexpected/unintended results.**
- **Modifying data fields.** The Database Manager can modify any field in documents by selecting the menu *Actions - WA Modify Field* (Notes client only). Select either specific documents or none to affect all documents in the database.
- **Changing a user name.** Change a user name for workflow documents by selecting the menu *Actions - WA Change User Name* (Notes client only). This can be particularly useful if someone leaves the company and active workflow documents need to be assigned to a different user (preferable to creating a long-term delegation).
- **Creating Delegation documents.** The Database Manager can create a delegation document for another user. Surprising how often this happens. Or not. Note that new delegations are taken into account during the early morning hours of the following day when the scheduled agent which handles this is launched.
- **Forcing delegations.** The Database Manager can force delegations to be applied immediately (rather than wait until the following day). This can be performed most easily from the *Delegations* view by selecting the button *Run Agent*. Reference the Admin View in [General Web Interface](#).
- **Deleting workflow documents.** The Database Manager can delete workflow documents directly from the *Admin* view by selecting the document(s) to be deleted followed by the *Delete* button. It is highly recommended however *not* to delete any workflow documents. If it is the most recent workflow document created, consider resetting the corresponding *Reference* document in order not to have any “holes” in the document numbering.
- **Updating chart data.** Similar to *Delegation* documents, chart data (statistics) is automatically updated during the night. Should you need to have the latest, up-to-the-minute data, you can do update this data from the *Admin* view - *Chart Data* screen.
- **Forcing state changes.** The Database Manager can force the state of a workflow document by selecting it followed by the *Force Change State* view action button (Notes client only). This operation is particularly useful when a user mistakenly archives a document.
- **Logging events.** You can keep track of various events by enabling logging in the active [Language document](#). This option should generally be turned off as during production as the log can become quite large (particularly on the *verbose* setting).

CONFIGURATION

- In the active Language document, you can configure Workflow Ascendant in a number of different ways including: changing the language, changing the date format, exclude weekends and holidays from the day counter, change how buttons and messages are displayed, how default emails are presented and so on.

Appendix C – Debugging

GENERAL

Domino Designer is equipped with a powerful debugging tool to debug your LotusScript code. Wherever possible, consider first putting your code in a Notes client button and verify the code there before executing it from an agent.

- **Your application specific code.** Application specific code to be executed when a workflow document is either opened or when the *Send* button is selected by the user should be referenced in the appropriate place in the [State documents](#) and defined in script library *WA Application Specific* (the calls to which to be included in subroutine *waExecuteStoredProcedure*). These subroutines can update document data and/or block a document from advancing in the workflow. All such code is executed via agents (*walInitializeWorkflowEngine*) and (*walInitializeWorkflowEngine*). Should you need to pass arguments to these routines, use designated fields to that effect in the workflow document.
- **Computed Form field values.** Computed formulas and default values will take effect as the *computeWithForm* option is set to *both* (referring to the *onload* and *onsave* events) in XPage *Document#* by default.
- **(walInitializeWorkflowEngine).** This LotusScript agent is launched from the XPage *Document# beforePageLoad* event. This agent in turn calls the *PostOpenDoc* (*WA Workflow* script library) which in turn executes any routines you have referenced in the *State* documents and defined in script library *WA Application Specific* (the calls to which to be included in subroutine *waExecuteStoredProcedure*).
- **(waRunWorkflowEngine).** This LotusScript agent is launched from the XPage *Document# postSaveDocument* event. This agent in turn calls routines you have referenced in the *State* documents and defined in script library *WA Application Specific* (the calls to which must be included in subroutine *waExecuteStoredProcedure*).

Workflow Ascendant is equipped with a complete set of logging features. Provided you have configured the log correctly (creating the *Agent Log* database and referencing it in the active [Language document](#)), you can put the following command in your application specific code in order to view variables / field values in the log:

```
Call a_LogWrite( "Got Here" )
Call a_LogWrite( doc.MyField( 0 ) )
Etc.
```

JAVASCRIPT

This will concern any specific transactions that take place *within* the context of a given state. Workflow Ascendant largely limits the usage of javascript to pulling values from the XPage and passing them on to LotusScript agents. Should you use that approach, the *a_LogWrite* command can first be used to verify that you're getting the values correctly into your agent. For any debugging to be done prior to (or after) that, you can use the following command to output variables to the Domino console:

```
print("Got Here")
```

There are also downloadable tools available on the web to display scoped variables.

Appendix D – @Formulas and Reserved Field Names

MOST COMMON @FORMULAS

- +. Separator used to concatenate strings. Keep in mind that Actions and Notification Subjects must be contained in a single line (unlike a Notification Body which can consist of several lines).
- <, <=, =, !=, >, >. Comparative operators which can be used in automatic routing rules as well as Actions.
- @Char(34). Translates to the “ character.
- @If(*condition*; *true*; *false*). Conditional statements which can be used in Actions.
- @Name([CN]; @UserName). The current user name - used in Notifications and Actions.
- @Text(@Today). The current date - used in Notifications and Actions.
- @Today. The current date - used in Actions where the date format needs to be preserved.
- @Unique(*WAReaders* : @UserName). Used to set the *WAReaders* field to progressively provide visibility to a workflow document (be sure to include also [WAManager] and [WASupervisor] initially to provide those users visibility).
- @UserName. The current user name - used in Actions where the full formal name needs to be preserved.
- And. Logical operator which can be used in automatic routing rules.
- Or. Logical operator which can be used in automatic routing rules.
- Not. Logical operator which can be used in automatic routing rules.

FIELD NAMES

- **WAAuthor**. The user name of the individual who created the workflow document.
- **WACurrentAuthors**. The list of user names who can intervene in the document at that moment in time.
- **WACurrentAuthorsDisplay**. The list of current user names displayed to the end users in the various views.
- **WACurrentState**. The name of the workflow document’s current state.
- **WADocRef**. Contains the unique reference allocated to the workflow document.
- **WAErrorMessage**. Contains any error messages which block advancing the document in the workflow.
- **WAFormName**. The process name displayed to the end users.
- **WAHistoryAuthors**. The list of users who have intervened in the workflow document to date.
- **WAReaders**. The list of users who can visualize the workflow document (in addition to those who have or who can modify the workflow document).
- **WAVersionRef**. The version of the workflow document.

Appendix E – List Classes

DECLARATION / INITIALIZATION

```
Dim listL As ItemList  
Dim listL As New ItemList  
Call List_Initialize ( listL )
```

List_SetListFromDocField

Declares *listL* as a list (class).
Declares and initializes *listL* as a list (class).
Initializes list *listL*.
Initialization is not necessary for

BASIC FUNCTIONS

```
Call listL.DeleteNthItem( index )  
Call listL.InsertNthItem( index, newItem )  
myItem = listL.PopOffItem  
Call listL.MoveDown( index )  
Call listL.MoveUp( index )  
in the list.  
Call listL.PushOnItem( newItem )  
Call listL.ReplaceNthItem( index, newItem )
```

Deletes the item at position *index* in list *listL*.
Inserts a new item at position *index* in list *listL*.
Pops off the last item in list *listL*.
Moves the *listL* entry at position *index* down in the list.
Moves the *listL* entry at position *index* up one
in the list.
Adds a new item to list *listL*.
Replaces the item at position *index* in list *listL*.

ROUTINES

```
Call List_CopyItems( item | listL, resultL )  
Append an item (or items in listL) to list  
resultL.  
Call List_GetIndexesFromItems( item, listL, index )  
Returns the position index of item in listL (0 if  
not present).  
If List_IsMember( item, listL ) Then...  
Returns True if item is found in listL.  
Call List_OrderList( listL, resultL )  
Alphabetically orders listL in resultL.  
Call List_SetDocFieldFromList( doc, "Field01", listL )  
Sets doc field Field01 (multi-value field!) with  
listL.  
Call List_SetListFromDocField( doc, "Field01", listL )  
Sets listL with the contents of document doc  
field Field01.  
Call List_SetStringFromList( listL, ".", result )  
Converts listL to a string in variable result  
using separator ".".
```

LOOP OPERATION

```
For index = listL.GetFirstIndex To listL.GetLastIndex  
    currentItem = listL.GetNthItem( index )  
Next
```

STACK OPERATION

```
While Not listL.IsEmpty  
    currentItem = listL.PopOffItem  
Wend
```

Appendix F – Script Library (WA Application Specific)

It is highly recommended that you do not modify subroutines beginning with “wa...”. The following is a list of these subroutines (at the time of this writing) along with a description as to their purpose.

- **waCntMandFields.** Controls mandatory fields (see routine `waSetErrorFlags` for details). Used with "red circle" error indicators.
- **waExecuteStoredProcedure.** Contains a list of routines referenced in the [State documents](#). Any new routines accessed by the State documents must be added here in order to be executed.
- **waExecuteStoredProcedureChild.** Contains a list of routines referenced in the State documents. Any new routines accessed by the State documents must be added here in order to be executed
- **walnitGanttFields.** Initializes the fields used in a Gantt chart.
- **walnitModFields.** Sets which fields in the workflow document the current user can modify.
- **walnitModTabs.** Sets which tabs in the workflow document the current user can modify.
- **waSetErrorFlags.** Returns true if mandatory fields are not set and updates the workflow document with the following: *WAEErrorMessage* (contains the error message to display) and *FieldError* (contains a list of fields to display the corresponding red circle error indicator).
- **waSetFieldListFromFieldDocs.** Internal routine which sets a list of field names derived from the Field documents.
- **waSetFieldUserListFromRoleDocs.** Internal routine which sets a list of field names derived from the Role documents.
- **waSetListModifiable.** Internal routine which gets the list of modifiable fields for the current user.
- **waSetRedCirclesNotes.** Sets the red circle indicators for Notes clients.
- **waSetUsersField.** Copies all users from the Field documents to the Workflow tab of a workflow document provided that the corresponding fields in the workflow document are empty.
- **waSetUsersMngr.** Copies all managers of the current user from the OU documents to the workflow document. Generates an error if the manager of the user is undefined.
- **waSetUsersRole.** Copies all users from the Role documents to the Workflow tab of a workflow document provided that: 1) There are corresponding Field docs for those roles; and 2) The corresponding fields in the workflow document do not contain a value.

Appendix G – JavaScript

Custom Control `zcontent_DocCode` contains a sample of some commonly used JavaScript code. In addition, the following links connect to web pages containing sample code for the various JavaScript commands available for XPages:

- [NotesDocument Sample JavaScript Code for XPages](#)
- [NotesView Sample JavaScript Code for XPages](#)
- [NotesDatabase Sample JavaScript Code for XPages](#)

1	{backendValueEL}	Getting a back-end field value (EL)
2	Get {test01}	Getting a back-end field value ↗ (synchronizing with front-end)
3	Get {test02}	Getting a back-end field value
4	Set Field11 T	Setting a field on the XPage (SSJS)
5	Get {getXPFieldSSJS}	Getting a field on the XPage (SSJS)
6	Set	Setting a field on the XPage (CSJS)
7	Get	Getting a field on the XPage (CSJS) <i>(You can't set a scoped variable from CSJS)</i>
8	Get	Getting (indirectly) a scoped variable (CSJS)
9	Prompt T	Prompting for user input
10	Go Field12 T	Calling an agent / virtual document

1	
2	var doc:NotesDocument = document1.getDocument(true) viewScope.test01 = doc.getItemValueString("Field11")
3	viewScope.test02 = document1.getValue("Field11")
4	getComponent("Field11").setValue("Server Side JS")
5	viewScope.getXPFieldSSJS = getComponent("Field11").getValue()
6	var element = XSP.getElementById("#{id:Field11}") element.value = "Client Side JS"
7	var myVar = document.getElementById("#{id:Field11").value var element = XSP.getElementById("#{id:Field11}") alert(myVar) alert(XSP.getFieldValue(element))
8	var myVar = document.getElementById("#{id:backendValueEL").innerHTML alert(myVar)
9	var userResponse = prompt("Please enter your response:", "<response>") XSP.getElementById("#{id:userResponse").value = userResponse
10	var doc:NotesDocument = document1.getDocument(true) var docVirtual = database.createDocument() var agent:NotesAgent = database.getAgent("(sampleAgentCallFromXPages)") docVirtual.replaceItemValue("TestField", doc.getItemValue("Field12")) agent.runWithDocumentContext(docVirtual) document1.setValue("Field12", docVirtual.getItemValue("TestField"))

Appendix H – Methodology

More than 90% of the development in Workflow Ascendant is done in classic IBM Notes. While following are the basic steps, the best approach is generally to copy/paste/adapt existing generic [State documents](#) which you have already tested. The XPage layer is (optionally) added at the end of the process once you have an operational application for the Notes client. For your very first application, you will need to sign the model database, configure the basics in the [Language document](#), set the basic *Workflow - ACL Entries* and create an agent log (optional).

1. **Notes database.** Make a Notes copy of the database according to your requirements (including modifying Page WA Left to reflect the name of your database).
2. **Language document.** In the *Documents* tab of the active Language document, set the *Alias* (how the process will be known to your end users) and corresponding *Notes Form Name* for each of the processes to be included in the database. *Logging Type* should be set to *Verbose* and *Hide Workflow Tab* to *No*.
3. **Field and Role documents.** Create these documents once you have identified the various profiles of those who will intervene in the various processes. Creating these first allows you to select these values from a list in the State documents (although that is strictly optional). Consider setting default values (*a1/Horizon*, *blue/Horizon* ...) in these fields for subsequent testing.
4. **Notes Forms.** Modify the existing Notes Forms (one per process) from existing ones forms:
 - **Workflow Tab.** Create all the Constraint fields defined in the previous step. Consider setting default values (*a1/Horizon*, *blue/Horizon* ...) in these fields for initial testing.
 - **Fields.** Create fields in the form which will affect the process (i.e., how documents are routed).
5. **State documents.** Create the State documents (always using the button *Verify* to verify that your definitions are coherent), concentrating on the basic manual and automatic routing rules:
 - **The following RIs can intervene...**
 - **And forward to the following states...**
 - **Which will be displayed as...**
 - **The following state will be routed to automatically...**
6. **Notes workflow testing.** Select the *Verify* button in the view to ensure that the process is coherent before testing. At the end of this step the basic workflow should be operational (note that the users placed as default values in Step 4 will be used, not those in the Field and Role documents).
7. **Notes initialization testing.** Include in each state document `$created$` (one for each process) the routines you plan to invoke when a workflow document is created (e.g., `#walnitModFields`, `#walnitModTabs`, ...) in field *The document will be initialized with the following stocked subroutine(s)...*. Remove the default values from Step 4 and verify that the expected users from Step 3 are correctly inserted into the appropriate fields on the Workflow tab (there is no need to test the workflow at this point).
8. **Finalize Notes Forms.** Create the rest of the fields in the Notes forms not completed in Step 4.
9. **Control routines.** Add any custom control routines to script library *WA Application Specific* and reference these (as well as any of those provided by default) in the various State documents.
10. **Window dressing.** Complete the State document Notifications and Actions tabs, as well as customizing presentation related information (*Historical Description*, ...).

OPERATIONAL NOTES CLIENT WORKFLOW APPLICATION

1. **XPages components.** Copy/paste XPages and Custom Controls to correspond to the Notes application created above.
2. **XPages fields.** Copy/paste fields into the appropriate Custom Controls.
3. **Visibility.** Apply mechanisms to selectively hide documents and/or portions of the workflow documents.

4. **Deployment**. Once you deploy applications, be sure to use design templates, naming them accordingly to facilitate design roll-back (e.g., *MD.Promo.2018.02.15.ntf*).

OPERATIONAL WEB CLIENT WORKFLOW APPLICATION