

QUICK START

Workbox v 1.0.0.10

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Thank you for choosing Workbox

We hope that our product will be useful for you. If you have any comments or questions regarding Workbox please do not hesitate to contact us. Contact details are included in *Troubleshooting* section of this document.

Please find some time to read this guide, which will help you to use all of functionalities of our product.

Setup configures full version of Workbox. Workbox has 2 versions, which depend on installed license. By default free version is installed, Enterprise version requires a purchase and installation of enterprise license.

Free version includes all Enterprise features with one exception: free version allows only 5 processes to be defined and associated simultaneously on one farm. If your organization needs more than 5 process definitions please purchase Enterprise license.

More about licensing can be found in setup guide, *Licensing* chapter. Setup guide can be found in the same catalog as this guide.

Version RC0 – what does it mean?

Current version of our product is RC0 – Release Candidate 0. It is a version that is designed to be released to market with some restrictions. This version may include some hidden flaws and have limited functionality. Having that in mind, please use caution when deploying this product to live environment.

At the same time we want to assure you that our team is continuously improving Workbox and we add new functionalities regularly. We encourage you to visit our web site– www.workbox.pl. You can find there latest version of Workbox as well as latest info regarding product development.

If you encounter any problems while using our product, please refer to instructions included in *Troubleshooting* section of this document.

1 Introduction

1.1 What is WorkBox?

WorkBox is an advanced platform that creates and manages business processes. WorkBox is a practical tool to define simple document flows such as flow of invoices, absences, sick leaves, business trips as well as modeling complex business processes based on company's IT systems.

1.2 Who is a WorkBox user?

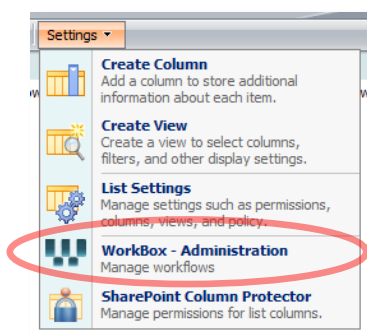
WorkBox has been designed for managers and business analysts who create business processes within a company. Use of Workbox does not require familiarity with any advanced IT details.

2 Start creating workflows!

2.1 Create a workflow

It is very easy to create workflows with WorkBox. Workflows can be created on SharePoint lists as well as on document libraries. Each user with permissions to manage a list, is able to very easily create a workflow by the use of graphic designer.

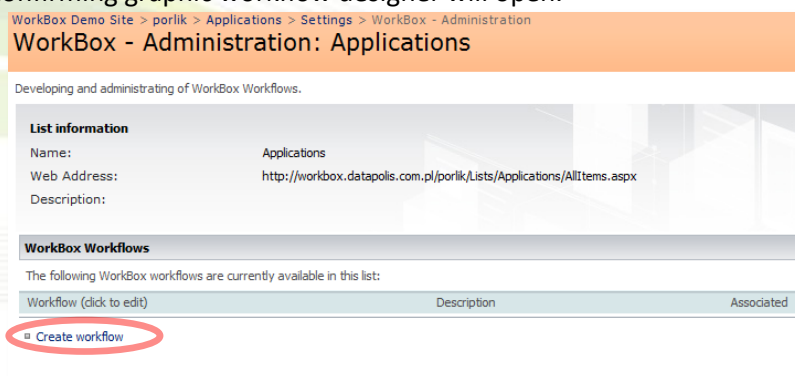
When installation of WorkBox on a SharePoint farm is completed, an additional option appears in list settings menu: **WorkBox – Administration**. By choosing this option a user can manage workflows on a given list.



Note: More than one workflow can be defined for a given list. All the created workflows can be launched simultaneously.

Workbox workflow management site provides a list of currently defined workflows

To create a new workflow, click the **Create Workflow** link. Then input the name of a workflow to be created. After confirming graphic workflow designer will open.



Note: Workflow names within a site must be unique.

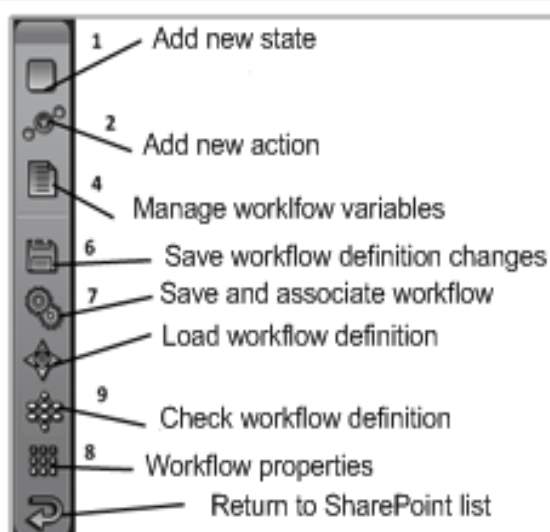
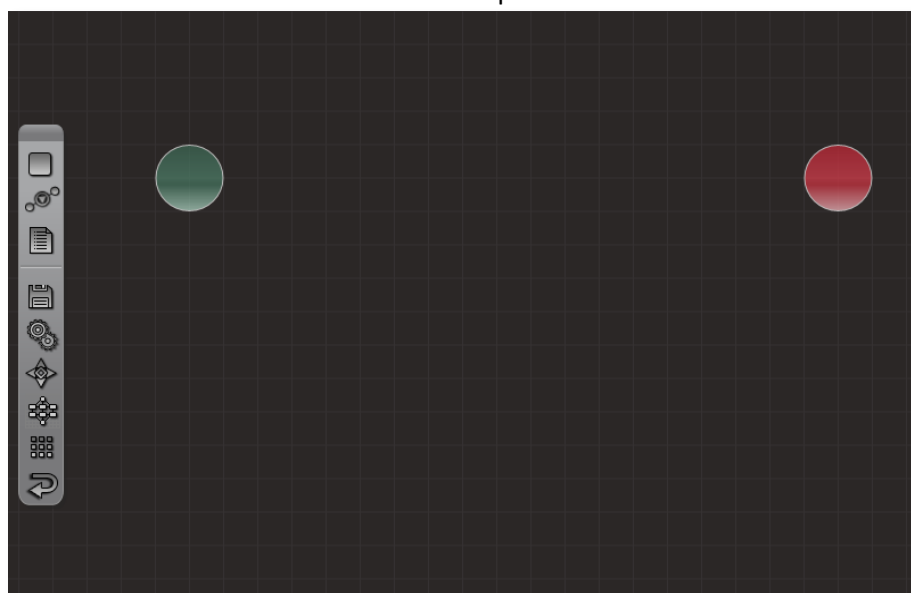
2.2 Designer

The designer will enable the user to define a workflow, assign permissions within a process, configure conditions of launching a process and publish defined process.

The architecture of workflows created in WorkBox is very simple yet at the same time it reflects real processes which are present in a company. The person who creates a process has to learn basic terminology: **states**, **action**, **activity**, **permission**.

Each process comprises of the beginning and the ending points, states, actions (transition from state to state), activities (operations which are supposed to be done by the system after the transition from state to state), permissions which define who can read and edit in each state and who has permissions to launch a given action.

After entering a graphical editor you see a is dark board with three elements: a green circle that stands for the beginning of a process, a red circle that symbolizes ending of a process and a toolbar placed on the left side which is used to define entire process.



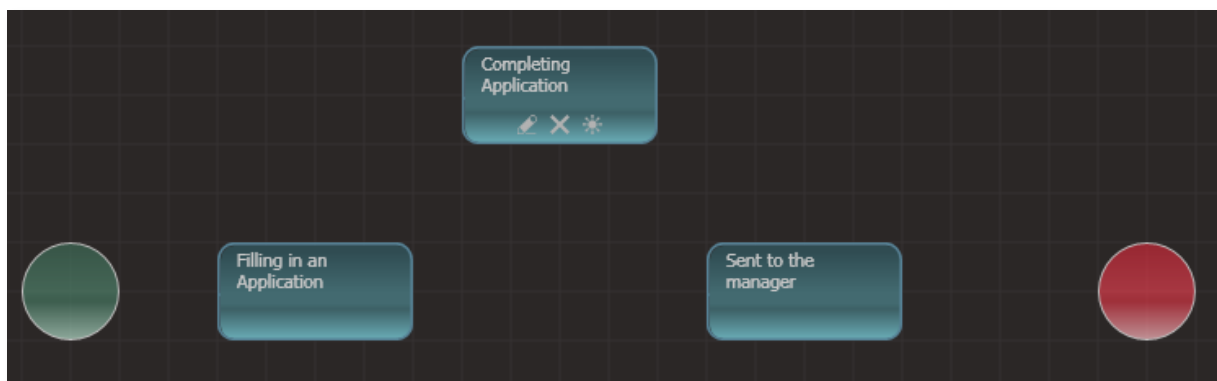
2.2.1 Adding states

States are said to be a logical representation of each phase of a process. To begin creating a workflow, it is necessary to define states (phases) which are going to be part of a process. In this case the state icon should be moved from toolbar on to workspace. This process should be repeated as many times as the number of states to be created.

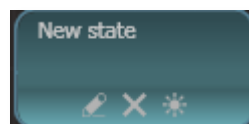
Example:

Submission of an application comprises of three phases: **Filling in an Application**, **Sent to the manager** and **Completing Application**.

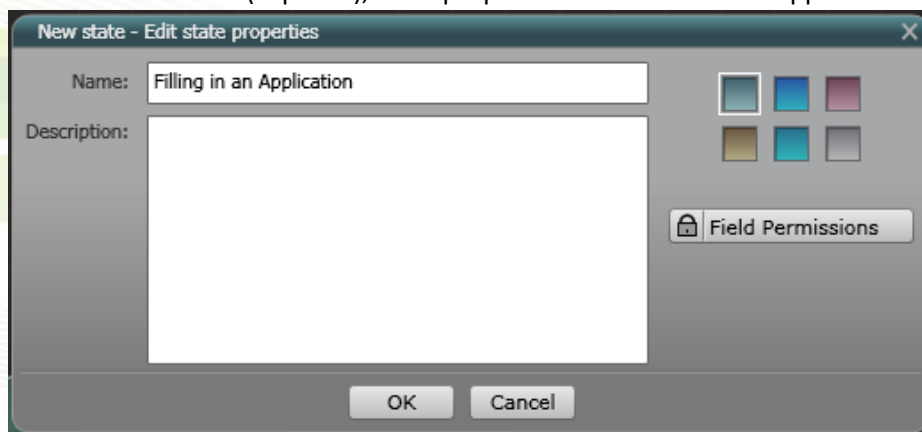
When a process is starting a person who submits an application should fill in a proper form. Phase: Filling in an application next the form goes to a manager's acceptance (State: **Sent to the manager**) here comes the phase when an application can be accepted, denied or transmitted to complete it (State: **Completing Application**).



In the following step it is necessary to go to editing each state. After you have moved mouse on a state there should be 3 icons: to edit, to delete the state and to add an action.



When you click on an "edit" icon (a pencil), state properties edit window will appear.



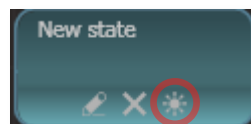
To configure the state:

- Name the state and add a description of it (the default name is “New State”).
- Change a color of a state (optional).
- Assign permission to field’s elements. The edition of this parameter is very important because it controls who has the permission to read and edit each column on a list when a process is in a given state.

2.2.2 Adding actions

Actions symbolize transition between states of a process. On the workspace actions are shown as lines which connect two states. New actions can be added in two ways. It can be achieved by

- Choosing **Add new action** from the toolbar
Next to the mouse cursor there should be icon which symbolizes adding action mode. When you move mouse cursor over a state connection points will appear. You can attach action to a state only at the connection point.
- Move mouse cursor over a state and click on the add action icon (right most icon).



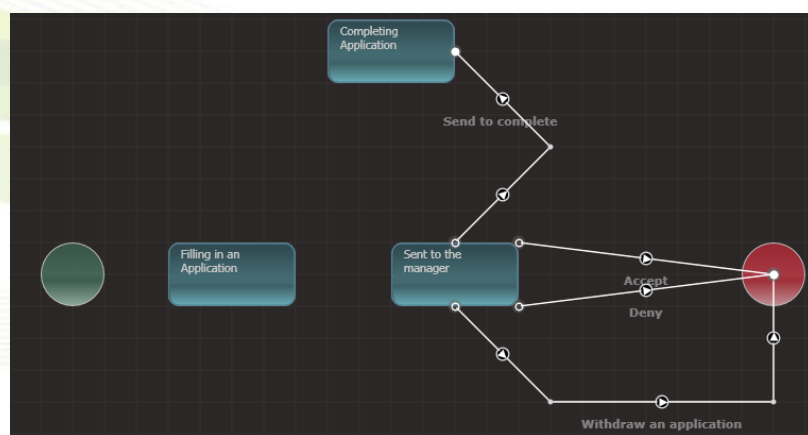
Note: direction in which action flows is marked by an arrow in a circle. The action symbolizes transition from state to a state, therefore it should be added in a way that it starts in a state from which a workflow can go and ends in a state where a workflow should enter.

Note: action arrows can be bent in order to change the way it connects two states. To bend an action arrow move mouse over a place where it should be bent, click and hold the left mouse button and move the mouse to draw new path of the arrow.

Example:

For the state **Sent to the manager** several actions can be defined: *Accept*, *Deny*, *Send to complete*, *Withdraw an application*.

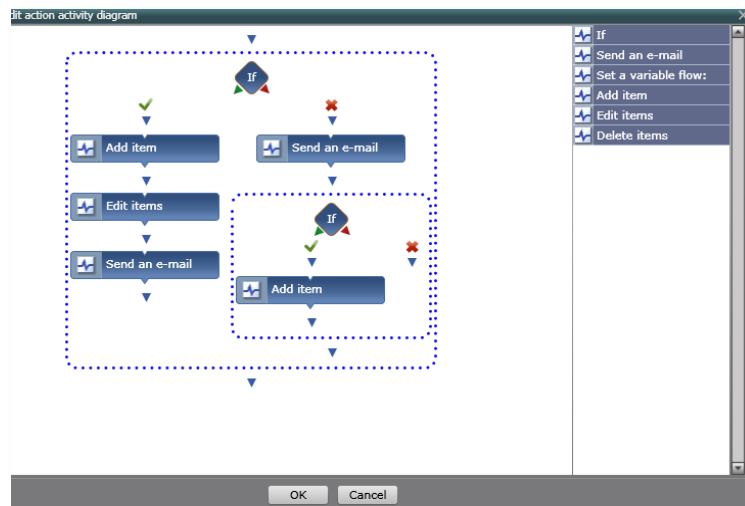
Accomplishment of an *Accept*, *Deny* action, *Withdraw an application* ends a process, accomplishment of an action *Send to complete* causes transition to **Completing Application**.



2.2.3 Activities

These are operations which are automatically done when an action of transmitting from state to state is being done. Examples of typical activities are: sending an e-mail, assigning task, editing an element on a SharePoint list.

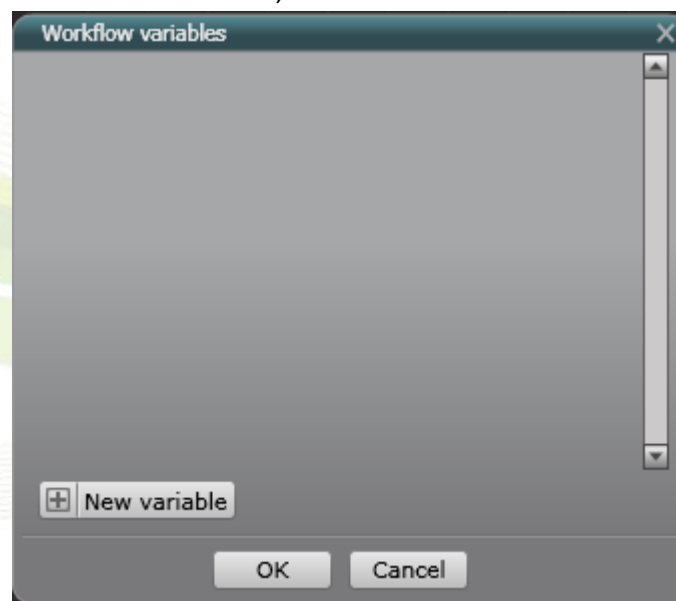
Activity diagram can be accessed through action properties edit window. Each can have a unique set of activities (in fact it is a small sequential workflow).



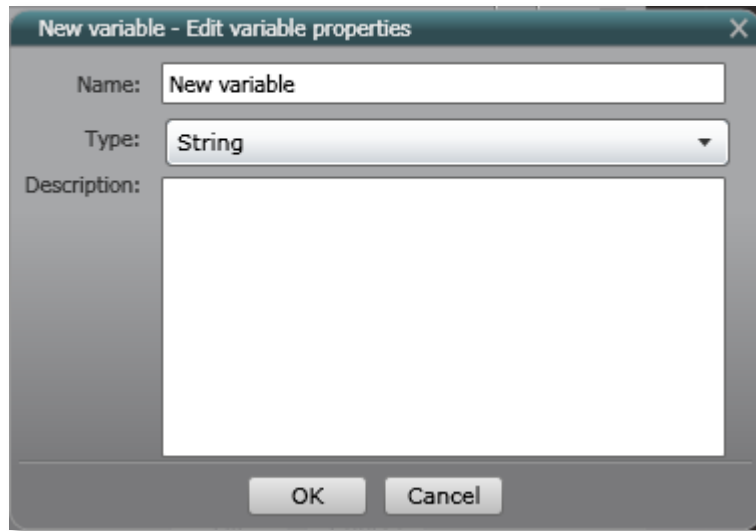
2.2.4 Variables

Workflow variables store information through entire duration of a given workflow on an element. Thanks to variables it is possible to ask a user to input a certain value (in our example it is giving a reason for denying an application during the 'Deny' action) and later using the value in a different state or simply writing the element in or sending it through an e-mail.

When you choose the **managing workflow variables** option, a following window will appear. It is the place where a new parameter can be added, deleted or edited.

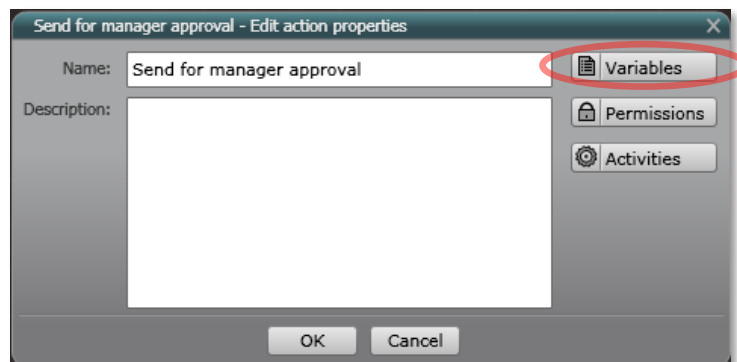


During addition (or edition) of a variable we can define types of variable (integer, real number, string, True/False, date and time).



The screenshot shows a dialog box titled "New variable - Edit variable properties". It contains three main fields: "Name:" with the text "New variable", "Type:" with a dropdown menu set to "String", and "Description:" with a large empty text area. At the bottom, there are "OK" and "Cancel" buttons.

To use a variable of a workflow, it is necessary to go to action parameters edit screen and choose the option: variables.



The screenshot shows a dialog box titled "Send for manager approval - Edit action properties". It has a "Name:" field with "Send for manager approval" and a "Description:" text area. On the right side, there are three buttons: "Variables" (highlighted with a red circle), "Permissions", and "Activities". "OK" and "Cancel" buttons are at the bottom.

In the following step there should be marked all the variables which have to be filled during creating this action.



The screenshot shows a dialog box titled "Send for manager approval - Assign variables". It features a list box with a single item "Reason" which has a checked checkbox. Below the list box is a "Manage variables" button. At the bottom are "OK" and "Cancel" buttons.

2.2.5 Permissions

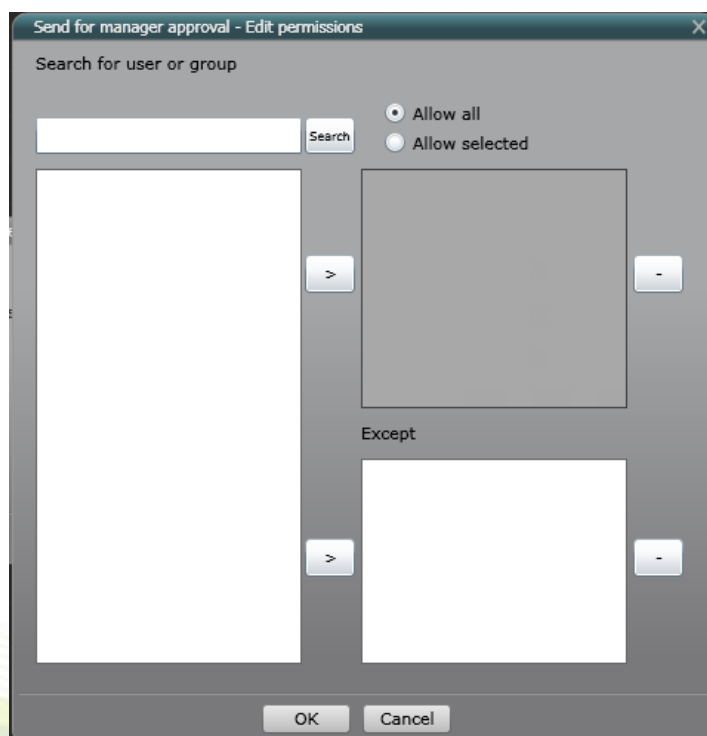
Workbox uses a model of permissions directly from SharePoint. Thanks to permissions a user who forms a process is able to define who has permissions to initiate certain actions who can edit or read elements of a field in a given workflow state. By the usage of permissions it is possible to define who has permissions to edit or read exact elements of a field in a given state.

WorkBox defines permissions in following objects

- Permissions to states
- Permissions to actions
- Permissions to element's field

In each element permissions are chosen by the usage of the same window

Permissions for each of those objects are set with the same window. In this window it is possible to set **allow all** permissions, **allow selected** and in this case it is also possible to narrow the list of allowed user with **Except** option.



2.2.6 Saving workflow

The option allows saving a workflow. Saving a workflow does not cause its association with a list. New instances of workflow will not be shown on a list.

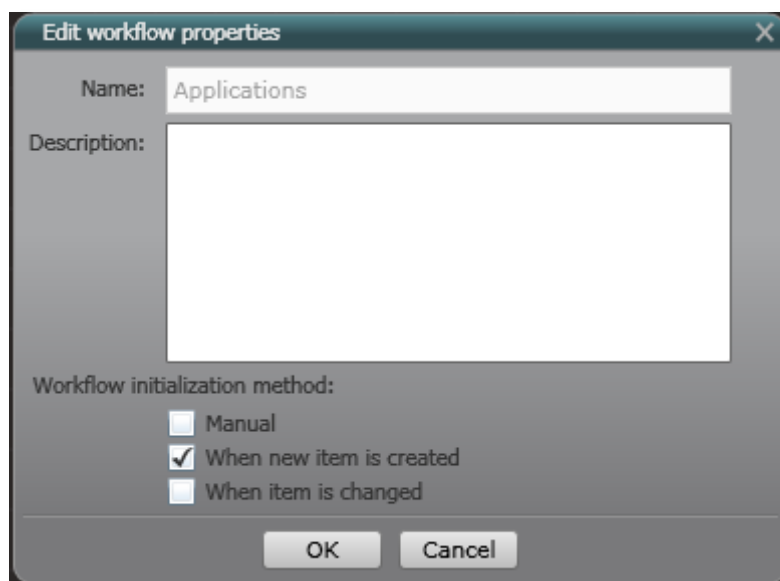
2.2.7 Workflow association

Association of a workflow causes its connection with a list. When Workflow is associated with a list it is possible to launch new instances of an associated workflow.

Note: association causes saving the definition of a workflow so there is no necessity to use the **save definition on a server** option before association.

2.2.8 Workflow properties

Here we can define the way of launching new workflow and add a short description of what this workflow does.



2.2.9 Workflow validation

The option of validation of a workflow allows checking the correctness of already created workflow. This option allows you to know whether created workflow will be successfully associated with a list.

3 How to use WorkBox?

When a workflow is created and successfully associated we can begin working on a SharePoint list. In this case a workflow begins automatically after creating a new element on a list.

Note: if a created workflow was defined in a way that can be launched manually the **Workflows** option should be chosen from the context menu of the list item to launch a new workflow instance on a given item.

Because a workflow in this case has been modeled in a way that the first state is **Filling in an Application**, a new created element automatically is in this state.

Note: First state of each created workflow is the state in which each element is in when workflow starts.

3.1 Workflow column

Each element on a list with a workflow working has its column where we can see the state in which a given element is.

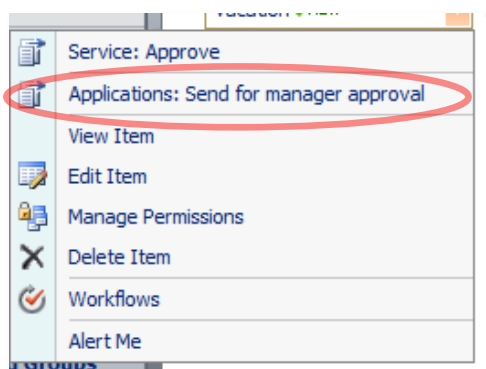
Title	Application Subject	Reason	Applications	Applications - state	Service	Service - state
Vacation NEW	Need an approval for summer vacation		In Progress	Filling in an Application	In Progress	New

A column is visible on a list view but it is not visible during viewing details of a given element or editing it. If on a given there is more than one process launched, each workflow will add its column the view with an element status in context of a given workflow. This column differs from default workflow column which is added automatically by SharePoint because a standard column gives only three types of information: In Progress, Finished, Error. Columns added by workflows created in Workbox present certain information about a name of a state in which a given element is.

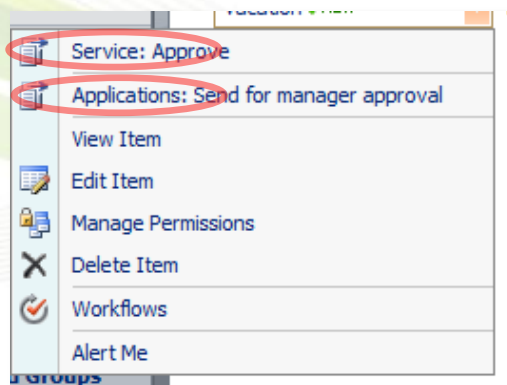
3.2 Context menu of an element

A great advantage of a WorkBox is that its workflows can be easily managed. Context menu of each element of a list is expanded with available actions. In our example workflow, if an element is in **Filling in an Application** state then there is only one action which will transfer this element to the **Sent to the manager** state – **Send for manager approval**

Note: In context menu there are visible all actions which a user can make on an element in a given state. If a user does not have a permission to perform an action, this action will not be visible in a context menu.



In a situation when more than one Workflow is started on an element of a context menu is expanded with list of actions for each workflow. Names of actions are preceded by names of workflows from which they come from.



When an action which we want to perform is chosen, a page appears on which we have to confirm the willingness of performing this action. When an action is completed we should click on a link **back to list** in order to come back to the list view.

In some cases a workflow can ask for data input when action is being done. In our example following actions were modeled in this way: Deny, Accept, Withdraw an application.

Vacation - Applications: Deny

Make Action: Applications: Deny

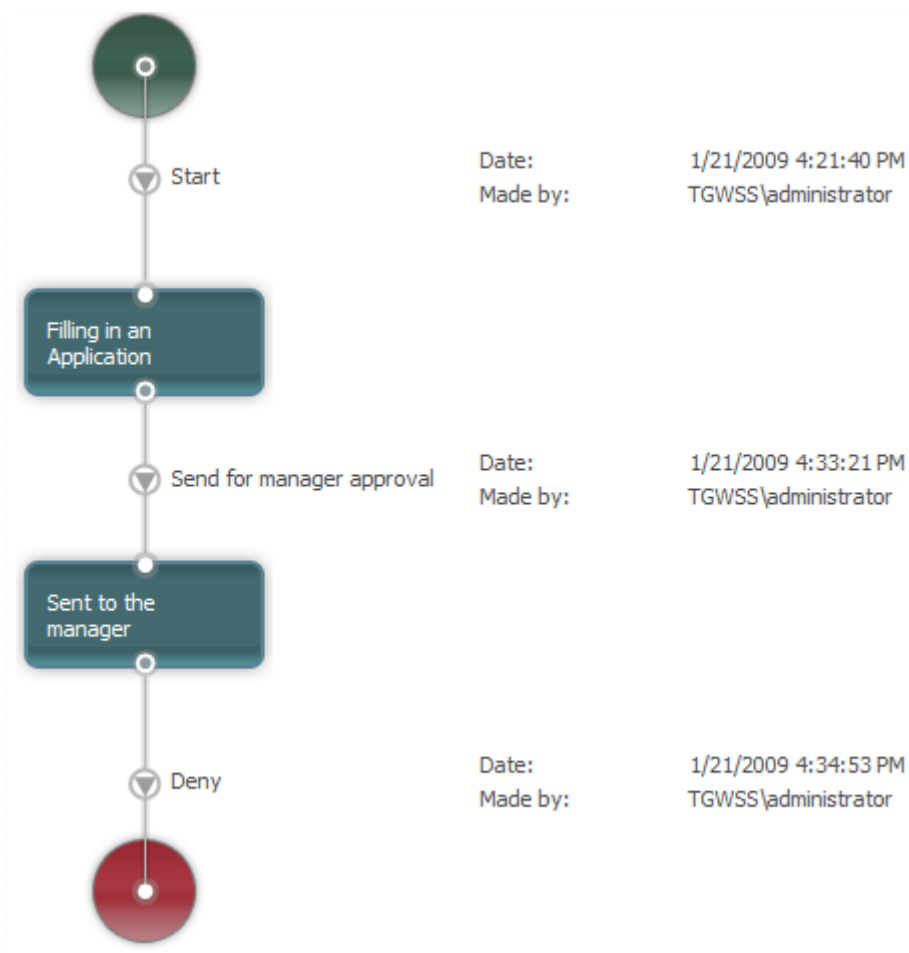
 Please fill below fields.

Reason:	No substitution available
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In this situation to perform action all fields must be filled in.

3.3 Workflow history

In every moment of workflow life cycle (as well as after it has ended) we can check its history which will tell us who and when made some actions on a given element. In order to see history of a workflow we need to choose **Workflows** option from a context menu of a given element and next click the name of a workflow which history we would like to see.



4 What is next?

Process of creating WorkBox is not finished. We are still working on additional activities, more advanced permissions and designer improvements. Additionally we are creating and developing elements which help Workbox to monitor and report all the processes.

Soon there will be the possibility to save a workflow as template and create new workflows from saved one.

We also predicted a way of importing data from an external source. We created SDK which helps a programmer to create his own activities.

Future versions of WorkBox will be compatible with previous versions which gives an assurance that a new installation won't destroy all the work that's been done.

5 Solving problems

In case of any bugs and problems that appeared during using of our application please visit our technical blog in order to solve your issues.

Blog's website: <http://www.datapolis.com/blogs/workbox>

In urgent cases or in case of appearing unknown problem, please contact support@datapolis.com