RUNA WFE. User Guide Version 2.1

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Graphical Interface

Once the system is installed, its graphical interface is available at: <u>http://<servername>:8080/wfe</u>. <servername> is the address of the server where the system is installed.

Note. In case of AltLinux, port 8080 is used by system services, so a different port should be specified in the URL (see "System Installation Instructions"). Under AltLinux, the following URL is usually used for the graphical interface: <u>http://<servername>:28080/wfe</u>.

Note. If the SSL protocol is used for the graphical interface, use the following URL: <u>https://<servername>:8443/wfe</u>

A web-browser, opened at the above address, should display a page to enter user login and password.



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After entering the system, the user will see the system menu in the upper left-hand part of the page. The menu includes the following items:

- Task List
- Process Definitions
- Process Instances
- Executors
- System

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File Edit View Go Bookmarks Tools Help									
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R U N A CONSULTING GROUP				Logged as: <i>gaiua</i> Logout					
Menu	Tasks								
System	► Show Controls								
Process Definitions Executors	Name	Description	Definition Name	Process Instance Id					
Process Instances Tasks	Make a decision	Accept or decline the offering	over time work demo	98304001					

Done

Task List

The page of the "Task List" menu item contains a list of tasks for this actor.

Click a task, and a corresponding form will appear.

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Done

Task Sorting, Grouping and Filtering

Click the small red triangle in the upper part of the form, and a sub-form with sorting, grouping and filtering properties will appear (to close the sub-form click the triangle again):

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Menu	Tasks						
Task List	View Default -						
Process Instances	Field name	Display Position	Sorting Type	Sorting Position	Groupping	Filter Criteria	
Executors	Name	1 -	asc 💌	none 🚽	Г	Г	
System	Description	2 -	asc 💌	none 💌	Г	Г	
	Definition Name	3 _	asc 💌	none 💌	Г	Г	
	Process Instance Id	4 _	asc 💌	none 💌	Г	Г	
	Owner	5 -	asc 💌	none 💌	Г		
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An example of grouping properties:

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 	//localhost:28080/wfe/mana	age_tasks.do?tabForwardName=manage_tasks	🔹 🕨 💽 Google		9
🗭 Getting Started 🔯 Latest Head	llines				
				Logged	das: <i>nero</i> Logout
Menu Task List Process Definitions	Tasks ►View Default ▼				
Process Instances					Total:4
Executors System	Name	Description	Process Instance Id	Owner	Role
	Definition Name: TimerDem	no			
	Before timer triggered	Before timer triggered	45875244	nero	requester
	After timer triggered	After timer triggered	45875211	nero	requester
	Definition Name: Vacation				
	Submit a hardcopy request	Submit a written request for vacation to the human resource department	45875229	nero	requester
	Evaluate a request	Evaluate a vacation request	45875221	nero	boss
					Total:4
4 · · · · · · · · · · · · · · · · · · ·					

Clicking the "Save as" button in the sub-form will create a new profile with the current properties of the sub-form. The name of the profile should be specified in the field to the right of the button. Once the new profile is saved, its name appears in the selection field next to the red triangle. When a profile is selected in the selection field, the representation of the current tasks changes according to the properties in the selected profile.

The sub-form also contains an "empty" field. This field allows to sort, group and filter tasks by values of a business process variable. To do so, enter the name of the variable. After a Save is executed, the filter will be applied to all the tasks for business process instances that contain a variable with this name.

Process Definitions

The page of the "Process Definitions" menu item contains a list of business process definitions, accessible to this actor for reading.

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PGetting Started 🔂 Latest Head	lines					
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Menu	Pro	cess	Definitions			
Task List Process Definitions Process Instances	► Viet	v D	efault 🚽			Total:6
Executors System			Name	Description	Process type	
		9	TimerDemo	Demo for element timer (no start form proveded)	Script	Properties
		A	Hello World	This is the simpliest process	Script	Properties
			Report	Example of a simple process. Participants of this process are members of manager and staff groups	Script	Properties
	Г	O	Overtime Work	Participants of this process are members of manager and staff groups	Script	Properties
		-	Vacation	Participants of this process are members of manager, all and human resource groups	Script	Properties
		6	Businesstrip	Participants of this process are members of manager, staff, bookkeeper and human resource groups	Script	Properties
						Total:6
						Undeploy
	-					
Done						

Business Process Sorting, Grouping and Filtering

Click the small red triangle in the upper part of the form, and a sub-form with sorting, grouping and filtering properties will appear (to close the sub-form, click the triangle again):

The sub-form properties are similar to those of the sub-form for tasks.

How to Start a Business Process

Clicking the name of a business process or process icon will start a new business process instance or a start form, if it is present in the process definition.

A start form example:

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♠ Getting Started ALatest Headlines		
		Logged as: <i>nero</i> Logout
Menu Start form		
Task List Process Definitions Process Instances Request fo	r a vacation	
Executors Since *	09.09.2008	(dd.mm.yyyy)
System Till*	10.09.2008	dd.mm.yyyy)
Reason *	need a rest	
Comments	fishing	_
Start		
Done		

Clicking the "Properties" command will open a page with business process properties.



Process Instances

The page of the "Process Instances" menu item contains a list of business process instances, accessible to this actor for reading.

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Menu	Process In	stances			
Task List	► View Defa	ault 🚽			
Process Definitions	10	_			TeteldE
Process Instances	12 >	Mana	Otente el m	En de d	Total:15
Executors	10	Name		Ended	version
System	45875249	Vacation	01.09.2008 14:56		1
	45875244	TimerDemo	01.09.2008 14:48		1
	45875229	Vacation	01.09.2008 14:45		1
	458/5221	Vacation	01.09.2008 14:45		1
	45875216	Report	01.09.2008 14:45		1
	45875211	TimerDemo	01.09.2008 14:44		1
	45875206	TimerDemo	01.09.2008 14:44	01.09.2008 14:46	1
	45875201	TimerDemo	01.09.2008 14:44	01.09.2008 14:48	1
	39321601	TimerDemo	31.07.2008 19:26		1
	32768073	Businesstrip	19.06.2008 21:31		1
	12 >				Total:15
Done					

A click on a business process instance will open the properties of the instance.



Sorting, Grouping, and Filtering Business Process Instances

Click the small red triangle in the upper part of the form, and a sub-form with sorting, grouping and filtering properties will appear (to close the sub-form, click the triangle again):

The sub-form properties are similar to those of the sub-form for tasks.

Executors

The page of the "Executors" menu item contains a list of potential task executors (actors or groups of actors), accessible to this actor for reading.

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Menu	Ex	ecutors		
Task List Brassas Definitions	► Vie	w Default 🚽		
Process Instances				
Executors		Name	Full Name	Total:14
System		manag er		group for managers
	Г	human resource		group for human resource department
	Г	bookkeeper		group for bookkeepers
		staff		group for main work personal
	Γ	all		group for all employees
		julius	Gaius Julius Caesar	
		nero	Nero Claudius Caesar	
	Г	cleopatra	Cleopatra VII The Daughter of the Pharaoh	
		octavia	Octavia Minor	
		tiberius	Tiberius Claudius Drusus	
		marcus	Marcus Aurelius Antoninus	
		gaiua	Gaiua Flavius Valerius Constantinus	
		attila	Attila the King of Huns	
		caligula	Gaius Iulius Germanicus	
				Total:14

Clicking an executor will open a page of executor properties:

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Getting Started Statest Head	lines							
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Menu	Ex	ecutor Details						
Task List Process Definitions							Permi	ssion Owners
Process Instances	Nar	me	julius					
Executors	Full	l Name	Gaius	Julius	Cae	sar		
System	Des	scription						
	Co	de	-11				_	
	Ap	ply						
	Sta	atus						
	Is Active						~	
	Ap	ply						
	Password							
	Nev	w password		**				
	Co	nfirm password						
	Ap	ply						
	Ex	ecutor Groups						
	► Vie	ew Default 🚽						
	Add							
		Name	Full N	ame		Description		
		manag er				group for mar	nagers	
		all				group for all e	mpioyees	
								Remove
	Add	ostitutors Substitution Add	Termina	ator				
		Organization Fu	inction		Su	bstitutors Crit	eria	Enabled
	Ok	<						
Done								

If the executor is an actor, this page contains information on the actor, a list of permission owners for this actor, a list of groups the actor belongs to, and a list of substitution rules.

Note. If the activity indicator of the actor is reset, substitution rules are activated for this actor, redirecting his or her tasks to substitutes.

If the executor is a group of actors, this page contains information on the actor, a list of

permission owners for this group, a list of groups that are members of this group, and a list of groups this group belongs to.

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Menu	Executor De	tails						
Task List			Permissio	n Owners				
Process Definitions	Name	bookkeeper						
Executors	Description	group for bookkeepe	ers					
System								
	Executor Gr	oups						
	► View Defaul	t 🚽						
	Add	_						
	Name	Full Name	Description					
			F	Remove				
	Group Mem	pers						
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	Name	Full Name	Descri	ption				
	T tiberius	Tiberius Claudius Drusus	3					
	Caligula	Gaius Iulius Germanicus						
			_F	Remove				
Done								

Executor Sorting, Grouping, and Filtering

Click the small red triangle in the upper part of the form, and a sub-form will appear where you can set properties for sorting, grouping, and filtering (to close the sub-form, click the triangle again):

The sub-form properties are similar to those of the sub-form for tasks.

System

The page of the "System" menu item contains a list of executor permissions to perform actions on the system.

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Process Definitions Process Instances Executors		Name	Read	Update Permissions	Login	Create Executor	Deploy Process Definition
System	~	Administrators	<u>~</u>	<u>v</u>	<u>v</u>	<u>v</u>	Г
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Done							

Details of Table Display Properties

The upper part of the tables of the system graphical interface contains a "View" command, represented by a red triangle (\mathbf{v}) .

A click on this icon opens a window with table properties:

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	32768044	Hell	o World		19.06.2008 21:30		19.06.2008 21:30)	1
	32768047	Tim	erDemo		19.06.2008 21:30		19.06.2008 21:3		1
	32768052	Rep	port		19.06.2008 21:30		19.06.2008 21:33	3	1
	32768057	Ove	ertime Work		19.06.2008 21:30		19.06.2008 21:33	5	1
	32768065	Vac	incostrin		19.06.2008 21:31		19.06.2008 21:34	+	1
	32708073	Bus	arDomo		19.00.2008 21:31	•			1
	39321601	1 im	erDemo	2	31.07.2008 19:26		01.00.0000.14.4	2	1
	45075201	1 IM Tim	arDamo		1.03.2008 14:44	r I	01.09.2008 14:48	2	1
	45075200	Tim	erDemo		1 00 2000 14:44	r I	01.09.2006 14:40	J	1
	12 5	I + Im	erbenno		1.03.2000 14:44	r			Tetel:
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In this window you can:

specify the position of a column on the display; specify sorting type and position; set grouping options; set filtering criteria; create a new profile based on the current one.

Here are some detailed examples of these properties.

1. Let us swap the "Name" and "Number" columns and remove the "Version" column:

set display position 2 for the "Name" column; set display position 1 for the "Number" column;

set display position "none" for the "Version" column.

After saving, the view will look as follows:

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	Id 2 🖌	asc 🖌 🛛 none 🗸	Г I				
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	Name	Id	Started		Ended	10(a).15	
	Hello World	32768044	19.06.2008	3 21:30	19.06.2008.21:30		
	TimerDemo	32768047	19.06.2008	3 21:30	19.06.2008 21:31		
	Report	32768052	19.06.2008	3 21:30	19.06.2008 21:33		
	Overtime Work	32768057	19.06.2008	3 21:30	19.06.2008 21:33		
	Vacation	32768065	19.06.2008	3 21:31	19.06.2008 21:34		
	Businesstrip	32768073	19.06.2008	3 21:31			
	TimerDemo	39321601	31.07.2008	3 19:26			
	TimerDemo	45875201	01.09.2008	3 14:44	01.09.2008 14:48		
	TimerDemo	45875206	01.09.2008	3 14:44	01.09.2008 14:46		
	TimerDemo	45875211	01.09.2008	3 14:44			
	12 >	1				Total:15	
Done							

2. Let us first sort by process name in the ascending order and then by number in the descending order:

set sorting type "asc" (ascending) and sorting position 1 for the "Name"; set sorting type "desc" (descending) and sorting position 2 for the "Number".

After saving, the view will look as follows:

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	Business	trip		3276	8073		19.06.20	008 21:31			
	Hello Wo	rld		3276	8044		19.06.20	08 21:30	19	.06.2008 21:30	
	Overtime	Work		3276	8057		19.06.20	008 21:30	19	.06.2008 21:33	
	Report			4587	25216		01.09.20	08 14:45	10	00.0000.01-00	
	TimorDon			3276	8052		19.06.20	00.14.40	19	.06.2008 21:33	
	TimerDen	no		4587	5244 5211		01.09.20	108 14:40			
	TimerDen	no		4587	5206		01.09.20	08 14:44	01	.09.2008 14:46	
	TimerDen	no		4587	5201		01.09.20	08 14:44	01	.09.2008 14:48	
	TimerDemo						31.07.20	08 19:26			
	12 >										Total:15
Done											

Note. To change the sort order, just click the column name.3. Specify grouping by "Name"; For the "Name" line, check the box in the "grouping" column and execute a Save command.

If you open the "Report" line, the view will be as follows:

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Task List	▼View De	efault 💌							
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	± Name: E	Businesstrip							
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	I Name: F	Report							
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	3276	8052		19.06.2008 21:30			19.06.2008 21:	:33	
	12 >	ImerDemo							Total:15
									10(01.10
Done									

4. Set the filtering criteria – to display a task, if the name of its process contains letter "m": For the "Name" line, check the box in the "Filter Criteria" field and enter the text: %m%

After a Save command is executed, the lines of the "Businesstrip", "Report", and "Hello World" processes will disappear from the view:

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Note. You can enter a string for a direct match search or use wildcards (a "%" symbol, denoting any string, including an empty string).

4. Let us create a new profile, based on the current one.

Enter "Profile Example" in the "Save As" field. Execute a Save As command.

In the upper part of the screen, the current profile will change to "Profile Example", and the choice element will now have two values: "Default" and "Profile Example".

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Switch to the default profile and restore the initial configuration:

For all the lines, the "Grouping" and "Filter Criteria" fields are empty. The "Sorting position" is "none".

Set display position 1 for the "Number".

Set display position 2 for the "Name".

Set display position 5 for the "Version".

Execute a Save As command.

Minimize the properties window (by clicking the **v** icon)

One can now change the view by switching the profiles in the choice element.

Work with Tasks

In a workflow system the activities of an enterprise are represented as a set of business processes. A business process is a time-ordered set of tasks, executed both by people and corporate information systems and aimed at reaching a predefined business aim within a predefined time period.

A business process can be represented as a mathematical graph – a set of nodes, called "Activities" and "route nodes" and interconnected by possible transitions. The tokens moves along these transition lines. When the token is transferred to a particular Activity, a task is sent to the corresponding executor.

Example of a business process graph:



If the executor is an employee or a group of employees of the enterprise (not an information system), the appropriate task will appear in the task list of this executor. A click on the task will display a form for this task. Once the task has been performed, the employee must fill in the data entry fields of the form and click "Execute":

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Once the task has been executed, the token moves to the next Activity of the business process.

If a task can be performed by a group of actors, it will appear in the task list of every group member. However, only one actor will actually be able to perform the task – the one who will be the first to do it.

One can always see the state of a business process. Just open the "Process Instances" menu and click the required instance. A page with the properties of the instance will appear.



Substitution Assignment

If an executor of a task is not "Active" (sick or on a business trip), the system can redirect his or her tasks to other executors. Substitution rules are used for this purpose.

The "Active - Not Active" box is checked in the actor properties.

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Substitution rules for each actor are set in the properties of this actor.

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There are substitution rules of two types:

"Rule" - specifies an Executor's substitute for a certain case.

"Terminator" – specifies that in a certain case the Executor is not to be replaced.

If a rule is set, it is necessary to define a function on the organizational structure and select substitution criteria from a list.

At present, the following functions on the organizational structure can be used:

- ru.runa.af.organizationfunction.ExecutorByNameFunction the only parameter of this function is the name of an actor or group of actors, substituting a particular Executor.
- ru.runa.af.organizationfunction.ChiefFunction the only parameter of this function is the employee number of the current actor. The function returns the actor's immediate superior as a substitute.

Example:

ru.runa.af.organizationfunction.ChiefFunction(2038)

The selected criteria correspond to the business process and swimlane, where the substitution will take place. There is also an "always substitute" option.

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If a terminator is specified, just select substitution criteria.

The substitution rules are analyzed "top down". The rules not checked in the "Apply" column are ignored.

For each rule, checked in the "Apply" column, the following is verified:

If substitution criteria are specified and the substitution rule is a terminator, the executor is not substituted and the rest of the rules are not considered.

If substitution criteria are specified, the substitution rule is a not a terminator and the function on the organizational structure returns at least one active executor, other replacement rules will not be considered.

If neither of the above two conditions is true, the next substitution rule is considered (in case the current substation rule is the last one on the list, no substitution takes place).

Note. The small triangles in the "Apply" column allow to change the position of a substitution rule on the list. To remove a substitution rule, uncheck the box in column 1 and execute an "Apply" command.