siatel

Gargantua Databases - Workflow Processes

Administration Tool

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What is a Workflow Process?

In every company or other organization, processes are implemented in order to improve collaborator's work consistency. Transposed into Gargantua's system, these processes allow speeding up, rationalizing, improving deadlines and leaving scheme management, thanks to computing technology.

Here is an example of a simple “Invoicing” process: After a maintenance intervention at one of our customers, our services issue an invoice. The secretary sends the invoice to the accounting department in order to validate the amount. When it is validated if the amount exceeds 1500 Euros, the invoice is sent to the director's office for a final validation. Finally, the invoice comes back to the secretary in order to be sent to our customer with a standard mail.

A process is composed of tasks which are linked together by the path the work flow goes through.

To each task the administrator assigns “roles” (function performed in the organization such as “secretary”, “accountant”, “human resources director”...) handled by physical persons. A role can be handled by the same person all the year long, or by several persons in rotation (or simultaneously) according to the leave sheet.

Every task can have an execution deadline (”validate working time”) after which a message is sent to a user or a role. A process as a whole can also have an execution deadline.

There are many other tools which allow organizing and making work easier.

Process management screen - Available tabs

The **Processes** management screen contains the following tabs:

- The **General** tab allows to view more details about a process, as well as the history of its versions.
- The **Graph** tab allows you to make the graph of a process, that is to say to create the tasks that will be done by the users.
- The **Properties** tab allows you to define the main settings of a process: what kind of form to use, who will be its manager, what are the attributes available, etc.
- The **Planner** tab allows you to indicate the timetable and workdays that will be considered for the time countdown.
- The **Scripts** tab allows you to create scripts that will be used in a process.
- The **Customization** tab allows you to define the custom layout of the process tasks in the simplified inbox.
- The **Dependencies** tab allows you to view the items used by a process: attributes, forms, roles, etc.
- The **Compilation** tab allows you to display the potential errors in a process.
- The **Summary** tab allows you to display a summary of a process, depending on its tasks.
- The **Log** tab allows you to view the list of all the operations performed on a process, and to filter them according to some criteria.
- The **Help** tab allows you to access the contextual help.

"General" tab

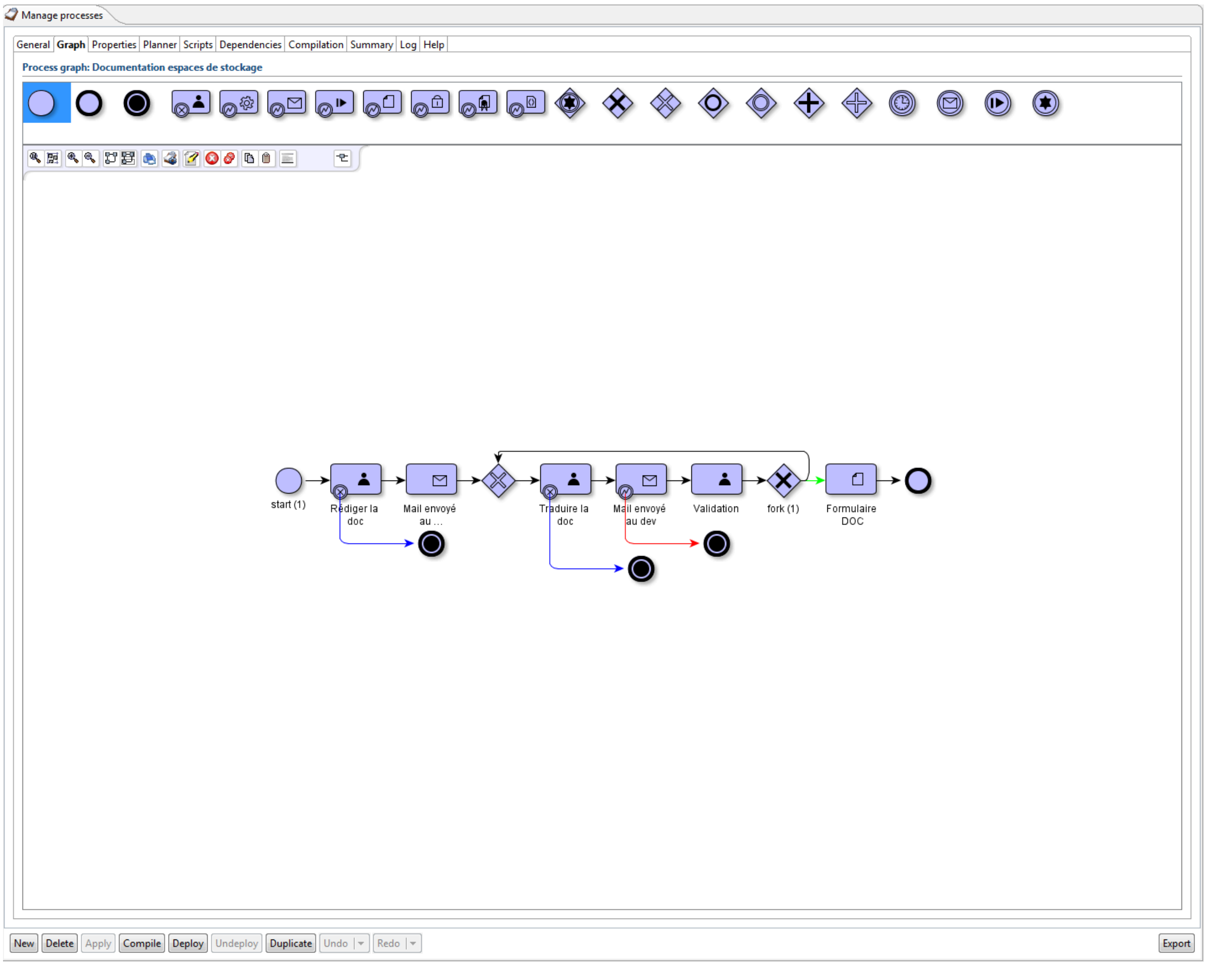
The **General** tab allows you to type a description of the process you have selected, and to add this process to a package.

It also allows you to view the history of the processes deployed versions, with the potential commentaries you might have typed during their creations.

"Graph" tab

The **Graph** tab allows you to define the way that the process runs, by adding automatic tasks or performed by various users.

The **Graph** tab is as follows:



At the top of the screen are the items that will constitute the process: tasks, events, gateways.

Just below, a toolbar allows you to optimize the layout and the graphic display of the process.

To learn how to use the **Graph** tab, please check Concepts and graphical representation.

"PROPERTIES" TAB

Each process has a set of configuration options (properties) which apply to it as a whole.
To display the process properties, in GARGANTUA 7 Administration Tool, click the process, then on top of the right pane click the **Properties** tab. You will then be able to specify and modify the process properties below:

Form

Select the form you want to assign to the process. This form is attached to the process all along its lifecycle: since its start, while it is running and even after it has ended. The form must contain the information allowing the retrieval of the process thanks to search tools (while it is running as well as after it has ended). It can also contain the information about its progression (when running), if it reveals necessary.

Manager form page

In the drop-down list, select a page of the form specified in the **Form** field. In the **Process manager** (accessible from the Web Client G Menu, only by members of the DBA group), process managers can see the processes and modify their form. If a page has been selected in this field, it will be the only page to display for the form. Otherwise, all the form pages will display.

Process manager

Select a role. The users in charge of this role are the managers for this process. These users can connect to GARGANTUA 7 Process Management module which gives an overview of all the processes whether running or ended. Thanks to this module, the process manager can consult the status of a running process as well as the history of an ended process.

Process priority

Assigning a high priority to a process allows having it on top of the list within the received tasks into the user's workflow inbox.

Default security profile for the process

You can use this drop-down list to select a default process security profile that will be applied to the process instances and the documents they contain, unless an authorized user modifies the access rights of these objects.

Click on **Display security profile** to go to the configuration page of the security profile selected.

Attributes available

Non-system attributes available in the form selected in the **Form** field. Select one or more attributes, and click the button to move them to the **Attributes displayed** frame.

Attributes displayed

Attributes selected among the attributes available. For each instance of the process, the values of these attributes will display in the workflow inbox and in the process manager.

Select one or more attributes, and click the button to remove them from the **Attributes displayed** frame.

Select one attribute, and click the or button to move it up or down in the **Attributes displayed** frame. In the workflow inbox and in the process manager, attributes will display in the order set in the **Attributes displayed** frame.

Estimated working time

You can estimate and indicate here the time the process should last. If the estimated working time is overlapped, the tasks are highlighted in red into the users' workflow inbox. Check the checkbox, then indicate the estimated working time in the fields in: days, hours, minutes.

Validate working time

You can indicate here a length of time after which the process is considered as "ended".

Automatically delete the process

Maintenance operations options to apply to the process once it is no longer circulating.

1. Check one or more of the following checkboxes:
    - **It is finished**: Automatically deletes the process from the database when it is finished.
    - **It is canceled**: Automatically deletes the process from the database if it is canceled.
    - **It has expired**: Automatically deletes the process from the database if the validate working time is exceeded.
2. Click **Apply** at the bottom of the pane.

Automatically send alerts when

These options send an automatic e-mail alert to the process manager(s).

If the alert applies to a user task, the roles assigned to the task also receive the alert.

1. Use the button at the right of the table to add an alert.
2. In the **Alert type** drop-down list, select one or more of the following alerts:
    - **Process started**: Send an alert when the process starts.
    - **Process finished**: Send an alert when the process is finished.
    - **Process canceled**: Send an alert when the process is canceled.
    - **Process due**: Send an alert when the date specified in **Estimated working time** (process properties) is reached.
    - **Process expired**: Send an alert when the date specified in **Validate working time** (process properties) is reached.
    - **Task started**: Send an alert when the work flow reaches a specific task.
    - **Task finished**: Send an alert when a task is finished (possible to go to next task).
    - **Task canceled**: Send an alert when the task is canceled.
    - **Task due**: Send an alert when the date specified in **Estimated working time** (task properties) is reached.
    - **Task expired**: Send an alert when the date specified in **Validate working time** (task properties) is reached.
    - **Task failed**: Send an alert when a system task (automatic task, start process task and EDM task) generates an error.
    - **Task accepted**: Send an alert when one of the task's potential executors accepts the job.
    - **Task refused**: Send an alert when one of the task's potential executors refuses the job.
    - **Task assigned**: Send an alert when a task is assigned from the **Process manager** (accessible from the Web Client G Menu, only by members of the DBA group): the alert specifies the name of the new user in charge of the task.

  - **Task reassigned**: Send an alert when a task is reassigned from the **Process manager** (accessible from the Web Client G Menu, only by members of the DBA group) or directly through the inbox: the alert only specifies that the user in charge of the task has changed.
  - **Task unassigned**: Send an alert when a task assignment was cancelled. It is the case when a task was reassigned to another user: the user who first had to execute the task receives an alert that specifies his task was cancelled.
  - **Group expired**: Send an alert when the date specified in the **Validate working time** field of a group is reached.
  - **Group failed**: Send an alert when a group has failed, for instance when a group task has expired or cannot be performed.

3. Select, if necessary, an existing customized e-mail template for each alert, in the **E-mail template** drop-down list.
4. In the **Recipients** section, fill the fields corresponding to the selected alerts:
    - **Attributes**: Click on the button at the right of the field to select a string, e-mail, users list, roles list or groups list attribute, then double-click on the attribute of your choice to validate. The values entered by the user in one of these fields, such as an e-mail address, will be the recipients of the alert.
    - **Groups**: Click on the button at the right of the field to enter the name of an existing group, and press Enter to validate.
    - **Roles**: Click on the button at the right of the field to enter the name of an existing role, and press Enter to validate.
    - **Users** : Click on the button at the right of the field to enter the name of an existing user, and press Enter to validate.
    - **Customized e-mails**: Enter the e-mail address of an external user that does not show in the GARGANTUA users list.
5. Click on **OK** to validate and add the alert in the table.
6. Repeat this procedure if you wish to add other alerts.

You can use the buttons at the right of the table to perform the following operations:

- Delete the selected alert.
- Edit the selected alert.
- Add all alerts.
- Delete all alerts.
- Set the same recipient(s) for all alerts in the table.

Prevent the automatic deletion of the process log

Store the process log entries even when the global log of the GARGANTUA database is cleared, or limited to a certain size.

Simple debugging (single user debugging)

Allows to test a process in the Web Client with only one user: the user who has started the process receives successively all the tasks in his inbox. This option is useful in the case of a long and complex process that involves many users and roles. Indeed, by checking this checkbox, you do not have to connect/reconnect with every user to test the whole process.

Allow documents access using security profiles only

Allows to access documents circulating in a process, even if they are not in your inbox. For this, you must have created a security profile that allows document access. Accessing the documents is made through a customized portal, via a document link.

Automatically export process when it ends

Once the process is over, all the information related to the process (forms, attribute values) and its documents (forms, files, attributes) are exported as a .sxa archive, in the “export” sub-folder of the GARGANTUA server installation folder. Then, it will be possible to import the archive in the Web Client, in a GARGANTUA database, with an importation asynchronous task (**Import operation**).

“PLANNER” TAB

The planners allow you to specify specifically the timetables and workdays of your co-workers, to consider them in the functioning of GARGANTUA (periods calculation and/or connection accesses restricted to some periods).

The planners of GARGANTUA can be classified in various categories, depending on the level and type of items they belong to:

- Default planner;
- Delayed operations planner;
- User planners;
- Process planners.

All the planners that exist for a server are listed by categories under the **Planners** branch of the Administration tool.

For more details about planners, check the dedicated planners documentation.

“SCRIPTS” TAB

The **Scripts** tab allows you to view and edit all the scripts linked to the various automatic tasks, and also to insert **Workflow** scripts defined at the **Scripts** subbranch of the current GARGANTUA database:

- To view the script linked a automatic task, click on the name of the script in the **Task** frame.
- To modify the selected script, edit it on the **Script editor** frame, then click on **Apply**.
- To insert a **Workflow** script type created from the **Scripts** subbranch, tick the corresponding box on the **Scripts** frame: the functions available in this script can now be used in the task scripts.

"Customization" tab

Creating the customization table

Display customization toolbar

The toolbar offers various possibilities to customize the display.

The toolbar icons allows you to perform the following actions:

General

- **Show/Hide markers**: click this icon to show/hide the table rows and columns. Showing them allows to customize them more easily; hiding them allows to view the display as it will be shown in the Web Client;
- **Legend**: click this icon to display the keyboard shortcuts list.

Customized layout

- **Customized display properties**: click this icon to show the display properties: events and number of columns;
- **Reset layout**: click this icon to delete the current layout and to go back to a blank table;
- **Insert column before**: click this icon to insert a column at the left of the table;
- **Delete column**: click this icon to delete the selected column;
- **Insert column after**: click this icon to insert a column at the right of the table.

Columns

- **Column properties**: click this icon to display the column properties: number of rows and cells, width, style, and vertical align;
- **Insert column before**: click this icon to insert a column at the left of the selected column;
- **Delete column**: click this icon to delete the selected column;
- **Insert column after**: click this icon to insert a column at the right of the selected column;
- **Insert a row above**: click this icon to insert a row above the selected row;
- **Delete row**: click this icon to delete the selected row;
- **Insert a row below**: click this icon to insert a row below the selected row.

Cells

- **Merge cells**: click this icon to merge two or more selected cells;

- **Undo merge cells**: click this icon to undo the merger of the selected cells;
- **Copy cell**: click this icon to copy the selected cell;
- **Paste cell**: click this icon to paste a cell;
- **Select merged cells**: click this icon to select the cell containing the merged cells (you need to be in the column containing these cells before using this option);
- **Reset cells**: click this icon to delete the content of the selected cell;
- **Randomize cells content**: click this icon to change the random text that is shown in the table preview.

CONFIGURING THE CUSTOMIZED TABLE

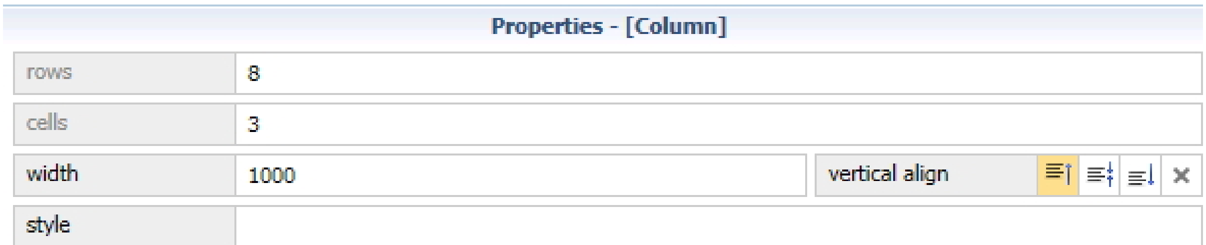
Once you have created the structure of your table, you can configure its columns and cells.

Before configuring your table, make sure of displaying the markers. The markers allows to show the location of the table elements.

- To configure a column:

1. Select the column that you want to configure, by clicking the top yellow line.

   All the column rows are highlighted. A table appears at the bottom of the right pane.



2. Fill in the fields of the table:

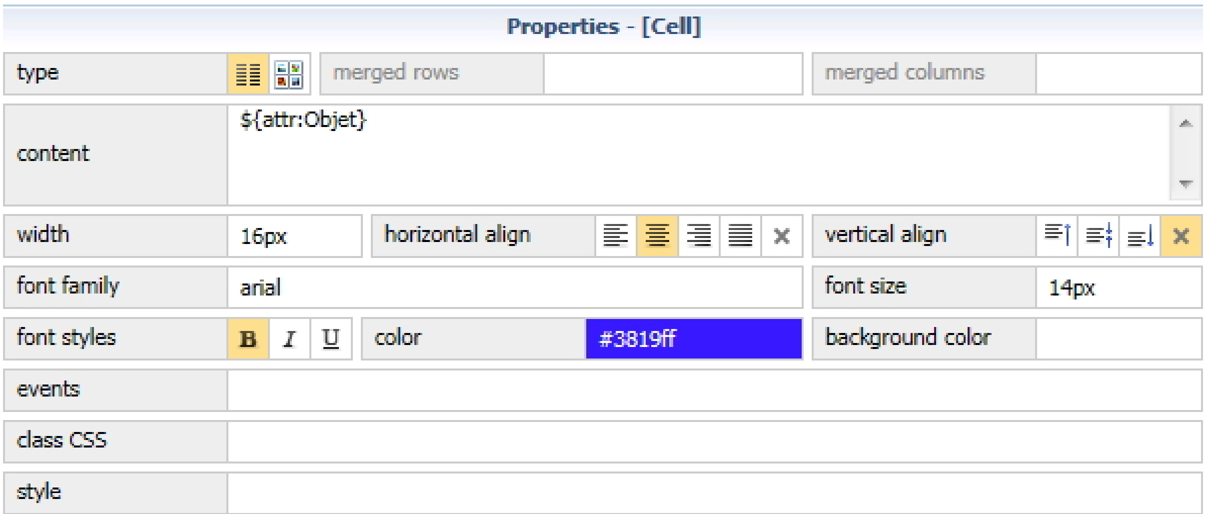
   - **Rows**: field automatically filled, depending on the number of rows inserted in the column;
   - **Cells**: field automatically filled, depending on the number of cells (or sub-columns) inserted in the column;
   - **Width**: width of the column. Can be expressed in pixels or percentages. You can choose a value, or click the field to open a list of the possible values;
   - **Vertical align**: vertical alignment of the column content, in relation to the content of the biggest column. The alignment can be done at the top, middle or bottom of the column;
   - **Style** : CSS style of the column.

   You have configured a column.

- To configure a cell:

1. Select the cell that you want to configure.

   The cell is highlighted. A table appears at the bottom of the right pane.



2. Fill in the fields of the table:

   - **Type**: choose to display a text or an image in the cell. The image or the text must then be added in the **Content** field;
   - **Merged rows**: field automatically filled, depending on the number of merged rows to create the cell;
   - **Merged columns**: field automatically filled, depending on the number of merged columns to create the cell;
   - **Content**:
     - Text: the text can be free, or can be an attribute value. To choose the attribute, click the field to open a list of the available attributes;
     - Image: the image can be a preview of the document, a server resource or one of the available icons in the list. To choose the image, click the field to open a list of the available images;
   - **Width**: width of the column. Can be expressed in pixels or percentages. You can choose a value, or click the field to open a list of the possible values;
   - **Horizontal align**: alignment of the cell content. Can be aligned on the left, right, centered or justified;
   - **Vertical align**: vertical alignment of the cell content. Can be aligned at the top, bottom or centre;
   - **Font family**: font of the cell content;
   - **Font size**: size of the font;
   - **Font styles**: style of the font (bold, italic or underlined);
   - **Color**: color of the font;
   - **Background color**: background color of the cell;
   - **Events**: JavaScript event of the cell;
   - **Class CSS**: CSS class of the cell;

- **Style**: CSS style of the cell.

  You have configured a cell.

- Once that you have finished configuring your table, click on **Apply**, then on **Deploy**.

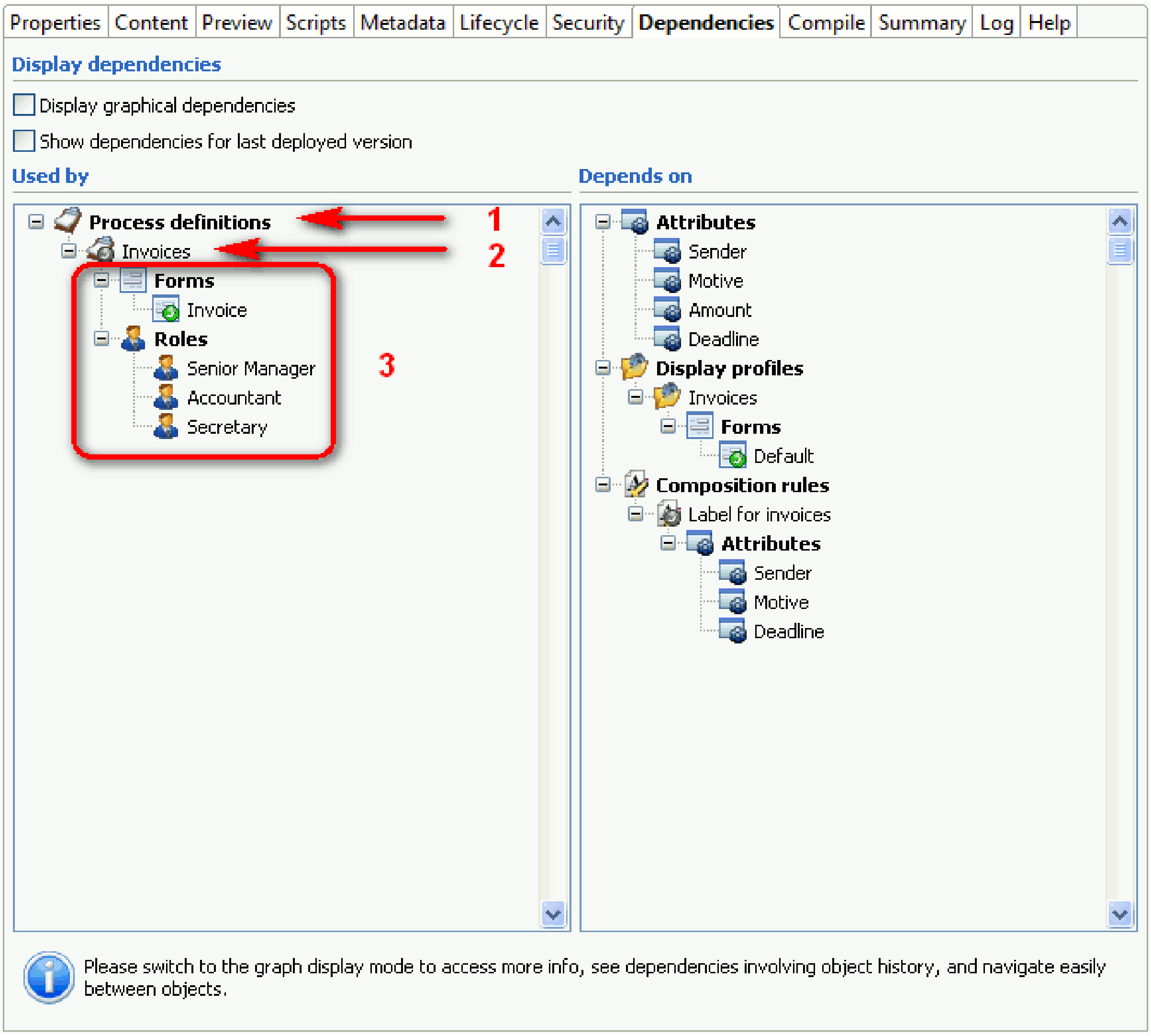
"Dependencies" tab

The **Dependencies** tab allows you to know which other objects rely on or are used by the current design object.

Displaying dependencies in list mode

By default, dependencies are displayed in **list mode** and the **working copies** of the objects are taken into account.

Depending on whether the current object is used by and/or relies on other objects, dependencies are displayed in 1 or 2 columns. If there are 2, the objects that rely on the current object are listed in the left column, and the objects that are used by the current object appear in the right column:



1. Some objects in this category have dependencies to the current object.
2. This object has a dependency to the current object, that is the “Invoices” process uses the “Invoice” form.
3. Here is the list of all objects that have a dependency to the “Invoices” process.

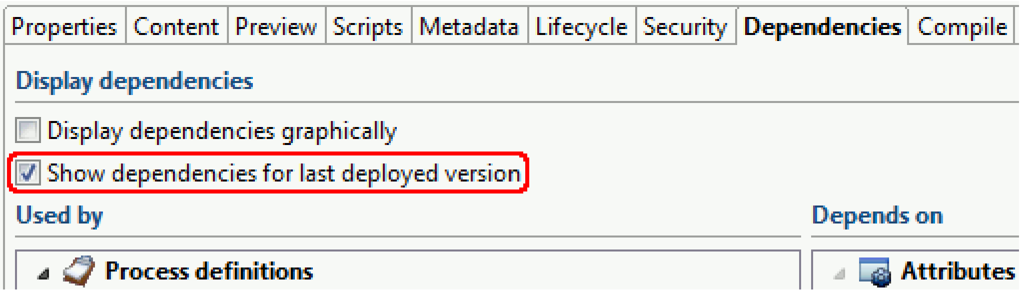
In the dependencies analysis screens as well as everywhere else in the interface, the icon indicates whether an object is currently deployed and, if so, whether the deployed version is identical to the working copy:

- No icon - The object is not deployed.
- - The object is deployed and there is no difference between its last deployed version and its working copy.
- - The object is deployed but its last deployed version is not identical to its working copy.

What is the "Show dependencies for last deployed version" option for?

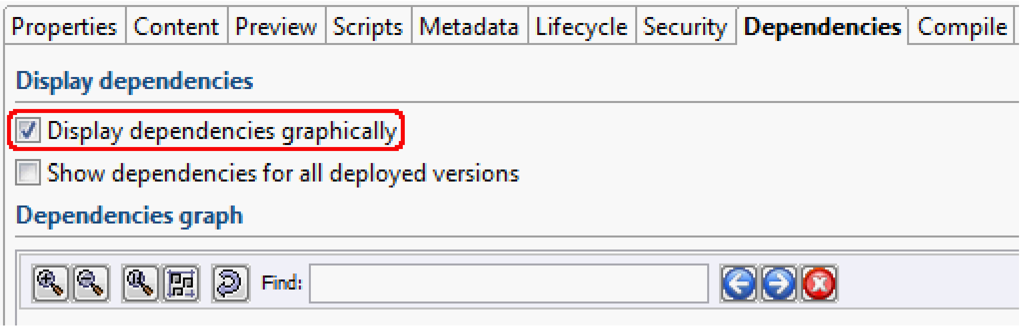
By checking the **Show dependencies for last deployed version** checkbox, you can choose to display the dependencies for the version of the object that is currently deployed, instead of the dependencies for the working copy.

This option is only available in list mode, for objects that support the **Deployment history** feature:

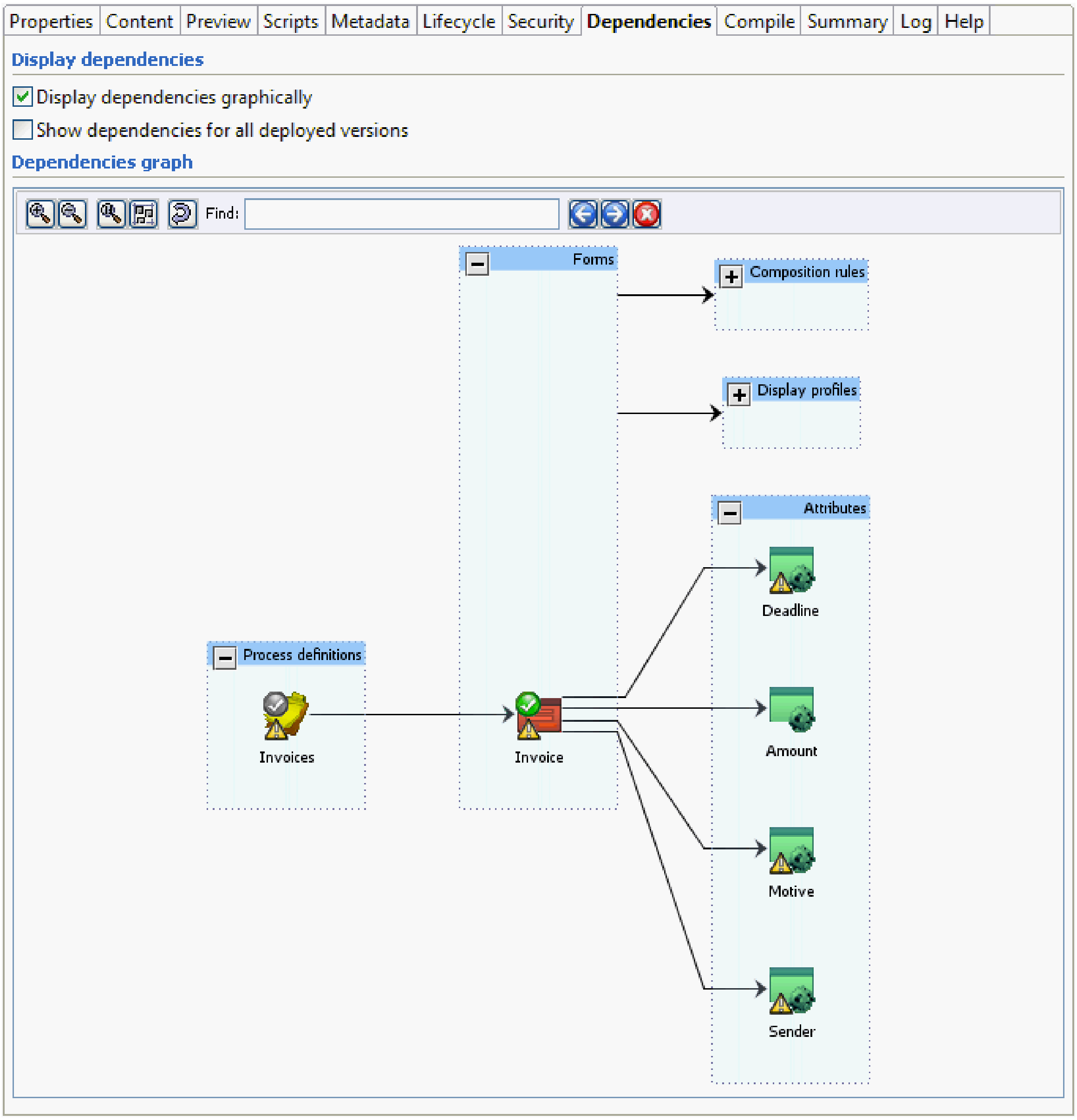


Displaying dependencies graphically

In order to switch from the list mode to the graphical display, check the **Display dependencies graphically** option:



The dependencies between the working copies of the various objects now take the form of a graph:



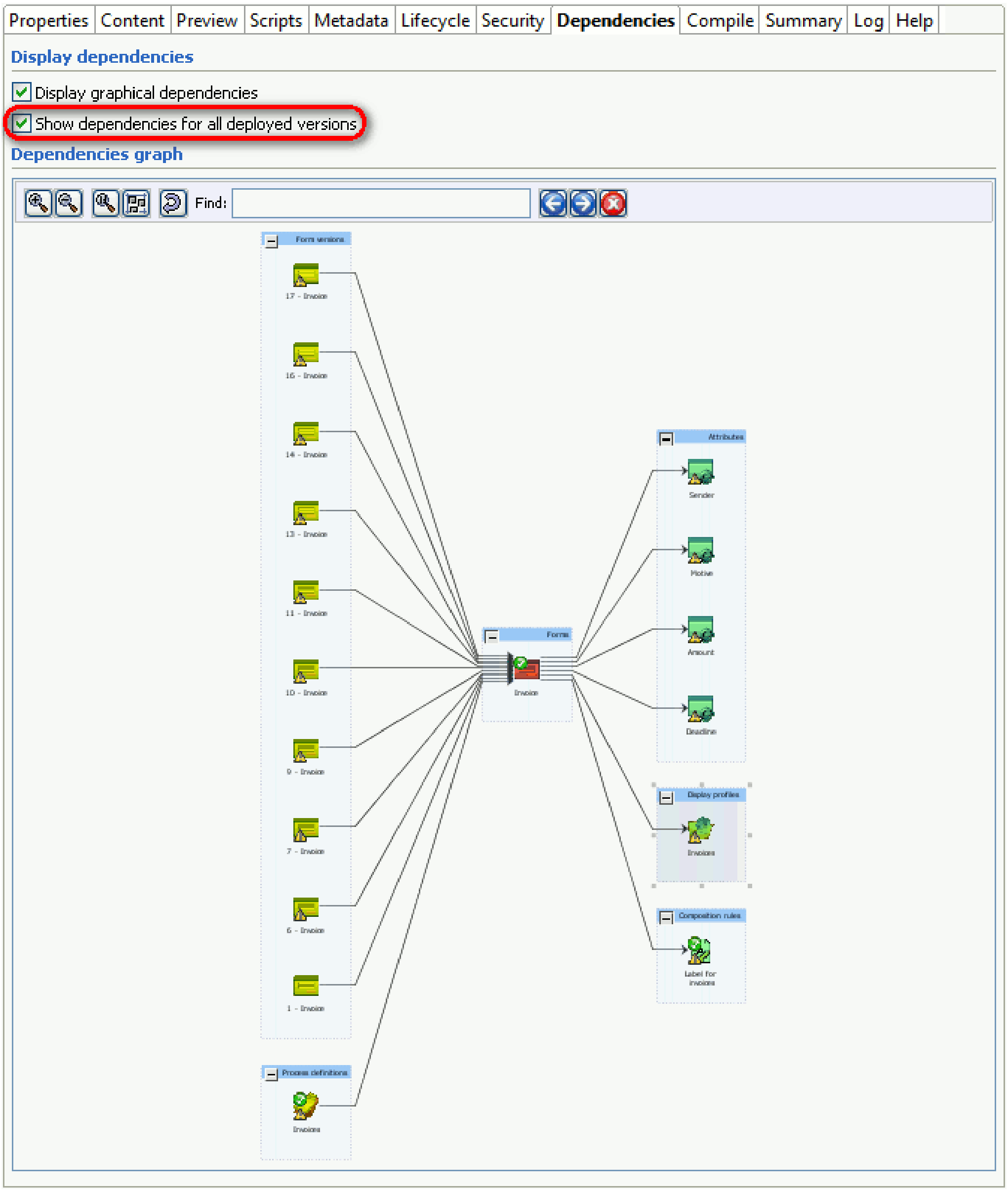
The toolbar above the graph allows you to:

- - Enlarge the graph;
- - Make the graph smaller;
- - Restore the default size for the graph;
- - Optimize the size of the graph;
- - Refresh the graph;
- Find: - Search the names of the objects in the graph for a particular string; the objects that match the search criterion are highlighted in pale blue;
- - - Navigate between the objects that contain the search string;
- - Reset the search results so that no more objects are highlighted.

WHAT IS THE "SHOW DEPENDENCIES FOR ALL DEPLOYED VERSIONS" OPTION FOR?

If you check the **Show dependencies for all deployed versions** box, the dependencies graph will include all previously deployed versions of the objects, instead of just their working copies. If the current object supports the **Deployment history** function, then the list of all its previously deployed versions will also appear in the graph.

This option is only available when dependencies are displayed graphically:



“Compilation” tab

The **Compilation** tab makes it possible to diagnose and solve errors and inconsistencies before an object is published. This feature is also available at database level, so that all objects can be compiled in a single move.

How and when to use the Gargantua compiler

Before you deploy or redeploy a design object, you need to compile it in order to solve any potential errors or problems:

1. Click the name of the object you want to deploy in the left pane of the Administration Tool - or the name of a database, if you want to deploy all the objects it contains in a single move.

   The corresponding management screen appears in the right pane.

2. In the lower part of the right pane, click the **Compilation** button.

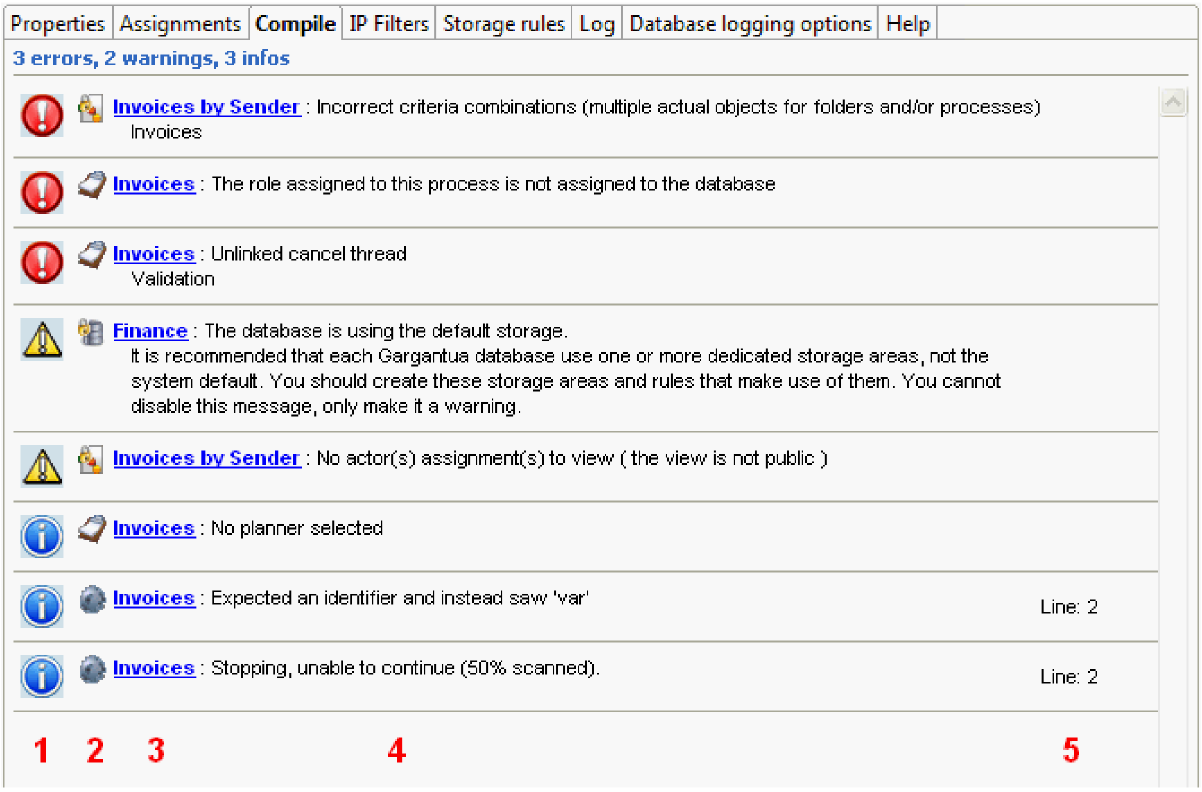
   The Compile tab opens and a list of messages appears.

3. If the list only contains success and/or information messages (see Structure of the messages list), you can proceed and deploy the object.

   On the other hand, if the list contains error and/or warning messages (see Structure of the messages list), you must solve the corresponding problems before you deploy the object.

STRUCTURE OF THE MESSAGES LIST

The list of the compiler's messages contains the following information:



1. Icons indicating the type of each message:

    - Success;

    - Information;

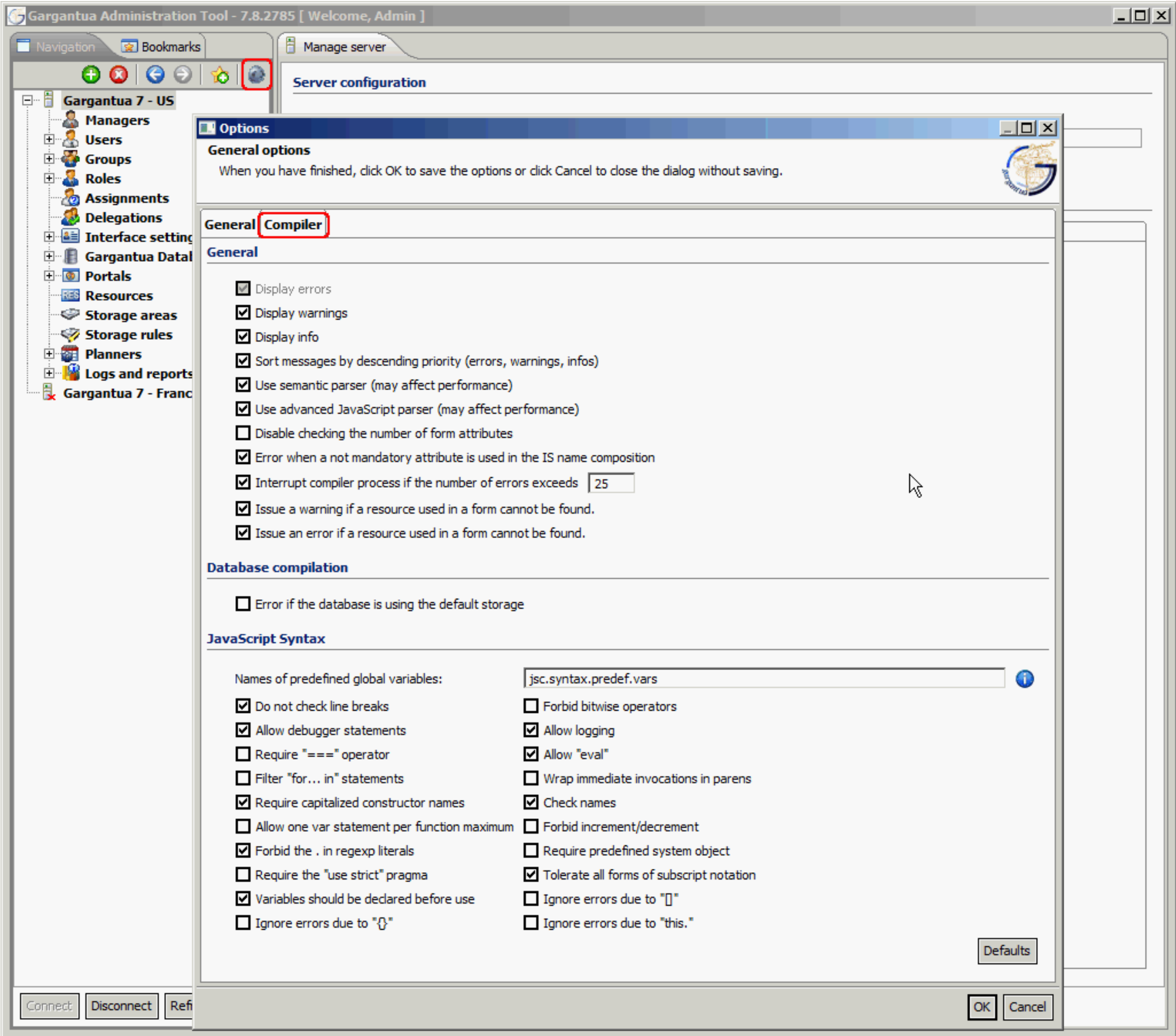
    - Warning;

    - Error;

2. Icons indicating the type of the objects the messages are about;
3. Links leading to the management screens where the problems can be solved;
4. Details about the current problem;
5. If the object is a script, line where the problem occurs.

CUSTOMIZING THE COMPILER'S BEHAVIOR

If you wish, you can customize the messages list (order, contents...) and the behavior of the JavaScript parser with the help of the **Options** dialog:



See the "General – Connection to Server" chapter of this manual for more information on the different options available.

"SUMMARY" TAB

The **Summary** tab allows you to display a summary of an item that presents its main features, like its manager, form, priority, content, etc.

The **Summary** tab is particularly helpful to have a general insight of the item, without having to browse through each tab.

The **Summary** tab also has a saving option in PDF format, which allows to view the summary of an item without the GARGANTUA Administration tool.

"LOG" TAB

The **Log** tab allows you to view a list of all the operations performed in one of the branches of GARGANTUA Administration Tool.

You can filter your search through the following criteria:

- Start date, end date;
- User;
- Operation.

To filter by dates:

1. Fill in the date from which you want to view the operations performed, in the **Start date** field.
2. Fill in the date until which you want to view the operations performed, in the **End date** field.
3. Click on **Display**.
   The list of the operations performed between the two dates is displayed in the **Log entries** field.

*You can also click on the **"Week audits", "Month audits", "Year audits"** and **"All audits"** icons, so as to view the operations performed in larger periods of time.*

To filter by users:

1. Click on the magnifying glass, close to the **User** field.
2. Fill in the user name from whom you want to view the performed operations.
3. Click on **Display**.
   The list of the operations performed by the user is displayed in the Log entries field.

To filter by operation:

1. Click on the arrow of the **Operation** field.
   A list of the possible operations is displayed.
2. Click on the type of operation desired.
3. Click on **Display**.
   The list of the operations performed in relation with the selected type of operation is displayed in the **Log entries** field.

*You can tick the **"Show login/logout events"** box to display the users connections and disconnections. This functionality is only available for the **"Users"** and **"Server log"** branches.*

*You can tick the **"Only Show error audits box"** to only display the failed operations.*

*The "**Reset**" button allows you to cancel the last filtering.*

You can also export the list of the performed operations, in .csv format.

To export a list of the performed operations:

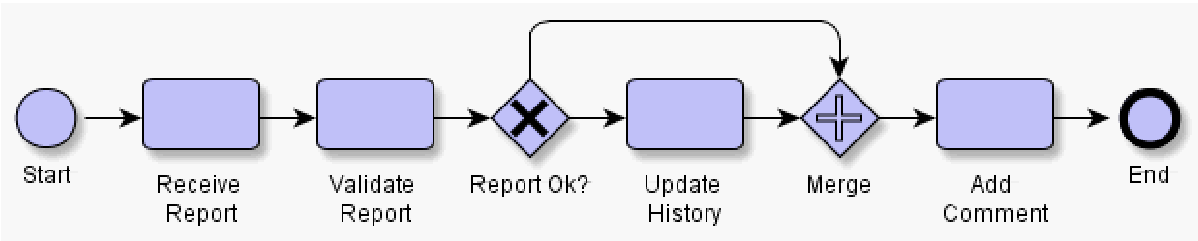
1. Generate a list, depending on the previous criteria.
2. Click on the **CSV Export** button.
3. Choose the place where you want to save the export.
4. Click on **Save**.
   You have exported a list of the performed operations.

CONCEPTS AND GRAPHICAL REPRESENTATION

GENERAL

In GARGANTUA, processes are represented graphically. The administrator is in charge of creating the processes' graphs.

Example:



The graphic elements that compose a process are standardized (BPMN - Business Process Management Notation standards). The BPMN standard is explained below.

PROCESS ELEMENT TYPES

WHAT ELEMENT TYPES ARE AVAILABLE WHEN DESIGNING A PROCESS?

In GARGANTUA 7, processes are composed of 4 elements' categories:

- Tasks;
- Events;
- Gateways;
- Connectors.

Each elements' category is represented by a specific geometrical shape.

Besides, for each elements' category, there are different object types represented by a symbol inside the geometric shape.

Tasks

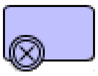
General

 A rounded rectangle represents a task.

Just as in real life, in a Workflow process, a task is “a job to be done”. A task has a beginning and an end. A task can start only when the previous one in the process has ended.

The different types of tasks available in GARGANTUA 7 are described below.

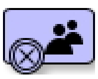
User tasks

 User tasks are the most commonly used. They represent a job the user must do manually.

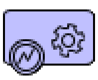
Reviewer task

 Reviewer tasks allow to assess process documents, or to select an answer among several proposals. To work properly, a Reviewer task must be assigned to a form that has an Opinion attribute. This attribute is a table that allows one or several users to either give an opinion on a document that circulates in a process, or to grade it, but also to choose an answer in a multiple-type list, and even to add a comment about it. Once that all the users have performed this task, then another user can decide between all of the opinions or choices, with the help of a Supervisor task.

Supervisor task

 Supervisor task are related to the Reviewer tasks. They allow a user to decide between all of the document reviews or grades, and all the choices. The user assigned to the Supervisor task can, not only visualize the users that gave their opinion, mark or choices as well as their comments, but also decide to cancel one, several, or all the reviews or choices.

Automatic tasks

 Automatic tasks do the job automatically thanks to one or several specific scripts.

E-MAIL TASKS

These tasks are specifically dedicated to sending e-mail. The sending can be automatic or not. If not, the user decides of the message's features.

SECURITY TASKS

These tasks automatically modify the access rights of documents added in previous stages of the process. Security tasks are used to modify the access rights of the documents added at different stages of the process flow.

If the process includes an ECM task, to insert the documents into the GARGANTUA database with access rights, a Security task must be added in the process before the ECM task.

To use the Security task, the GARGANTUA database security level must be Complex.

When designing a process, the administrator defines the rules, and security profiles that must be applied if the rules are true. The system compares the rules to the documents. If a rule matches a document, then the corresponding security profile is assigned to the document.

The first matching rule wins. Therefore, the order of the rules set up in the task's parameters is important.

Any authorized user can customize a document's access rights thanks to the "Access rights" tool from the toolbar of the "Documents" frame in the workflow module.

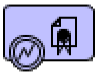
START ANOTHER PROCESS TASKS

These tasks are specifically dedicated to starting another process among those published in the same GARGANTUA database.

EDM TASKS

These tasks are specifically dedicated to classifying process' documents into a GARGANTUA database: creating classification folders and configuring the composition of their name.

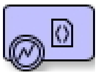
Signature tasks

 These tasks allow you to automatically sign ("certificate" file) and/or encrypt the documents added in previous stages of the process and corresponding to specific criteria.

When designing a process, the administrator defines the rules that documents have to match to be signed or encrypted (using criteria such as document type: .doc, .xls…; form; label…). The system compares the rules to the documents. If a rule matches a document, then the document is signed or encrypted. The signed or encrypted documents are converted to PDF format.

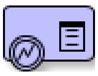
> ***The certificates to use for processes must be added or imported using the "Certificates" branch of the Administration Tool, as server certificates.***

Document template tasks

 Document template tasks allow you to integrate document templates, previously created in the **Document templates** branch, into a process. When designing a process, the administrator defines the conditions to be fulfilled to generate this or that document template. Therefore, the document template that will be generated will depend on the choices made by the user in the form.

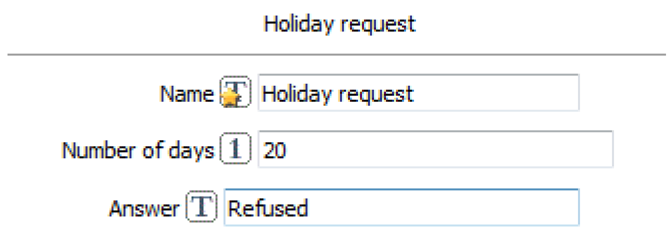
*For example: think of a process that aims to help a company reply to various invitations. There are two **Document template** tasks: one to accept invitations, the other to decline them. The **Acceptance** task includes a document template which is a positive response to the invitation, whereas the **Refusal** task includes a document template which is a refusal to the invitation. Therefore, after reading the invitation, the user can accept or decline it, which will generate the appropriate document template automatically.*

Set attribute tasks

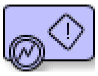
 The Set attribute tasks allow you to automatically fill the fields of a form, when specific conditions are fulfilled.

For example: an employee wants to ask for a 20 days vacation. Thus, he fills a holiday request form, specifying the number of days that he wants to take.

However, it was defined in a Set attribute task that if the number of days off is higher than 15 days, then the request will be refused. Once the form is validated, the Answer field is automatically filled by the Refused value. If the number of days is lower than 15 days, then the Answer field is automatically filled by the Accepted value.



CHANGE PRIORITY TASKS



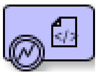
Change priority tasks allow you to change the priority of a process task, regarding specific conditions based on attribute values.

For example, a company has designed a process to manage incoming mails. In the first step, the mail service has to characterize the mail, and to select, in the "Recipient service", the recipient service for the mail. In the Properties tab, it was defined that this process has a Normal priority.

However, it has been decided that all mails going to the Accounting service must now have the priority Important, to process them more quickly.

In order to do that, a condition has been specified in a Change priority task: if "Accountant service" is selected in the "Recipient service" attribute, then the process will have the Important priority. Therefore, all the tasks of this process will inherit this priority, and will be classified in the Important section, in the user imboxes.

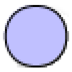
XML export tasks

 XML export tasks allow you to export in a pre-made folder:

- Forms and attribute values of the process and its documents, as a XML file;
- The process log;
- The process documents.

Events

General

 A circle represents an event.

An event is something that “happens” during the course of a process. There is no work to be done. An event usually has a trigger or a result.

In a process, there can be start events, intermediate events and end events. You can identify them thanks to their border:

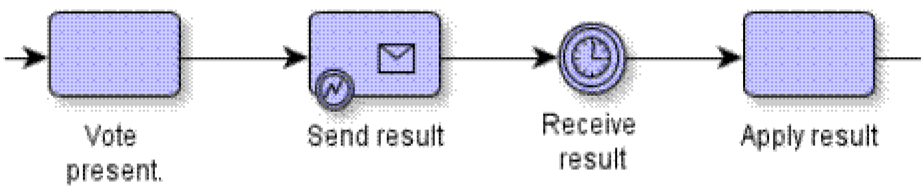
A process always contains **at least a start event and an end event**.

Intermediate events occur after a process has been started and before a process is ended.

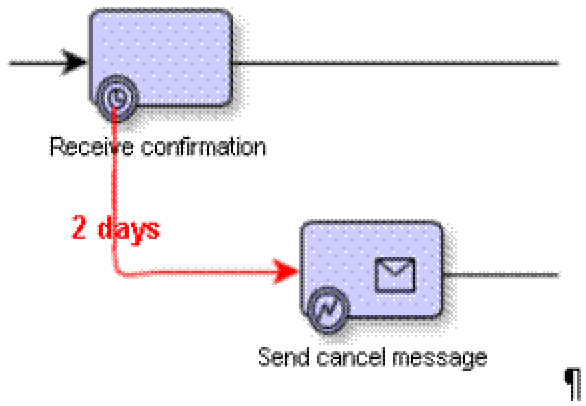
There are several “triggers” that indicate the specific circumstances of an event.

An intermediate event can be placed in the normal flow of a process or attached to the boundary of a task.

Event in the normal flow of a process: when they are placed like in the figure below, events represent something that happens during the normal flow of the process.



Event attached to a specific task: events that are attached to a task (or to a sub-process) can potentially interrupt *the task (or the sub-process) if the event happens.*

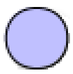


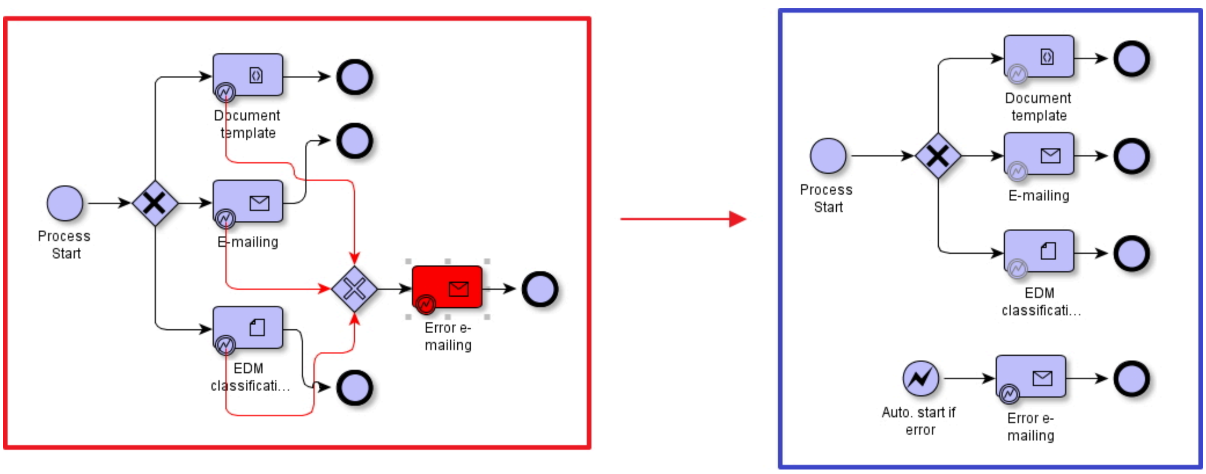
There are different types of events according to how they function. A symbol inside the circle represents an event's type.

The available event types in GARGANTUA 7 are described below.

START EVENT

There are different "triggers" that indicate the specific circumstances that start the process:

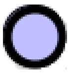
-  **Start**: this event does not have a specific type. It is usually used to start a process when there is no special trigger defined.
-  **Automatic start if error**: this event is used as a fail link for system tasks and groups. This event is used to simplify graphes, when the fail links of various tasks trigger the same action (automatic e-mailing for instance). Indeed, instead of having one fail link for each task, you will only have a lone link that manages the errors of these tasks.



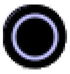
-  **Automatic start with delay**: this event indicates the time when a process is triggered (automatically).

  For instance, the Incoming mail process will start every day at 9 AM.

End event

 This event does not have a specific type. It is usually used to mark the scheduled end of a process path, which may be the main path as well as any other. When an End event happens, the other active paths stay active, if any.

Stop

 This event marks an interruption of a process for a particular reason. *Examples: errors generated, bypassed deadlines…* The flow is then interrupted in all the active paths. The Stop event is usually placed at the end of an alternative path, which is scheduled in case the process cannot continue its normal course.

Cancel

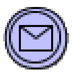
 This event is similar to the Stop event, as it marks an interruption of a process for a particular reason. The only difference with the Stop event is the state of the process at the end of this event: it will be “Cancelled”, and not “Stopped”.

Timer

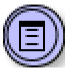
 With this event, you must indicate a deadline which generates a result if it expires.

Example: if the previous task in the graph is not done within three days, then the order is canceled.

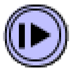
Wait e-mail event

 This event means the system is waiting for someone to receive an e-mail.

WAIT ATTRIBUTE VALUES

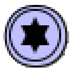
 This event means the system is waiting for an attribute to receive a specific value. As long as this attribute value is not chosen, the process cannot follow its route through this path.

WAIT PROCESS EVENT

 This event means the system is waiting for a sub-process to end or stop. As long as the sub-process has not ended or stopped the main process cannot continue its course through the path. This event allows for the synchronization of both processes.

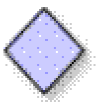
> ***Designing a process with a Start another process task, but without its Wait process event, means that both main process and sub-process (started thanks to this task) can keep going independently. The main process does not wait for the sub-process to end or stop.***

CUSTOM EVENT

 This event allows customizing your processes in order to satisfy at best your needs. It can be any type of event coming from the system: data, archive stored... or a signal coming from an external dedicated application.

GATEWAYS

GENERAL

 Gateways are the flow switchers. They contain the rooting conditions between entering and outgoing flows. A gateway means no action, no work to do.

Gateways are represented by a diamond with a symbol inside to indicate a special type, if necessary.

Whatever their type is, gateways are used to divide one flow into several as well as to merge several flows into one.

If the flow does not need to be controlled, a gateway is not needed. Thus, a diamond represents a place where control is needed.

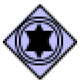
The available gateways in GARGANTUA 7 are described below.

Exclusive gateways

What is an exclusive gateway?

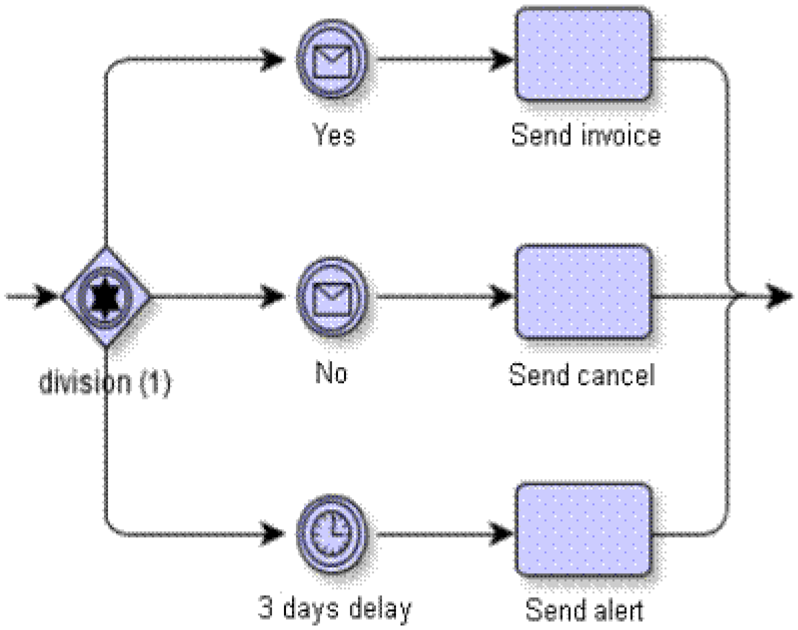
Exclusive gateways (decisions) divide the flow in several outgoing paths of which only one can be taken. They are basically "the fork in the road" for a process.

Event exclusive division

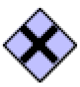
 The decision to take one path is based on **events** that follow the gateway (one different event by alternative path). The first event that happens determines the path to be taken.

The event exclusive division gateway is represented by a custom event inside a diamond.

Example:



Data exclusive division

 It is the most frequently used gateway type. The decision to take one path is based on **data**: set out conditions. The data that intervene in the conditions can be attribute values or any other data source.

Each alternative path after the division has a **condition**.

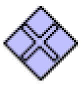
A **default path** is specified.

The alternative paths must be classified by priority order. The system examines the conditions in that order and the flow takes the first path of which the condition is true. If any of the conditions is true, then the flow takes the default path.

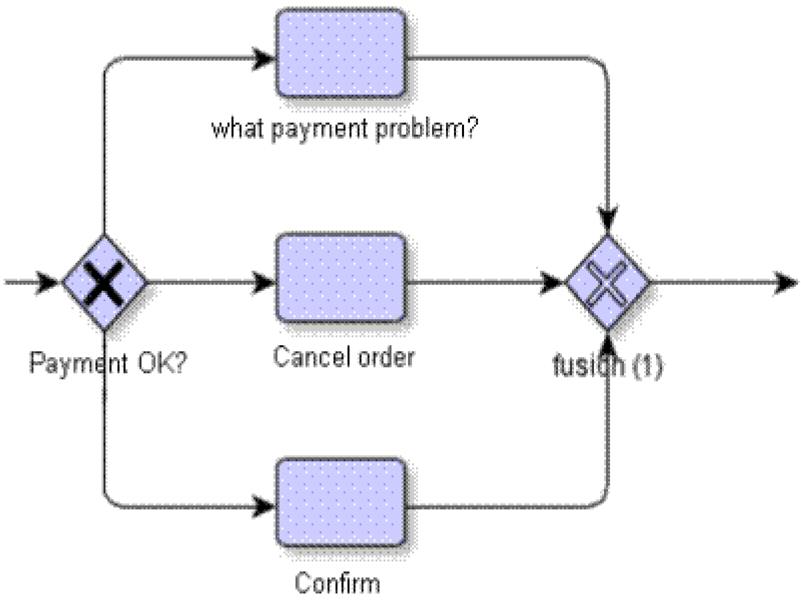
Example: three alternative paths are classified in priority order as follows: A, B, C. The flow arrives to the gateway and examines condition "a" for path "A", if it is true the flow takes path "A". If condition "a" is false, then condition "b" is examined. If it is true, the flow takes path "B", and so on. If any condition is true, then the flow takes the default path. Exclusive gateways (decisions) divide the flow in several outgoing paths of which only one can be taken. The default path may be one of the "A", "B", "C" paths or another "D" path.

A diamond with a cross inside represents the data exclusive division gateway.

Exclusive fusion

 Exclusive fusion merges several paths into one after a division.

Example of data exclusive division/fusion:



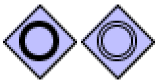
Inclusive gateways

What is an inclusive gateway?

Inclusive gateways divide the flow in several outgoing paths of which several of them can be taken. The process flow continues through one or more different paths.

The decision to take one path is based on **data**: set out conditions. The data that intervene in the conditions can be attribute values or any other data source.

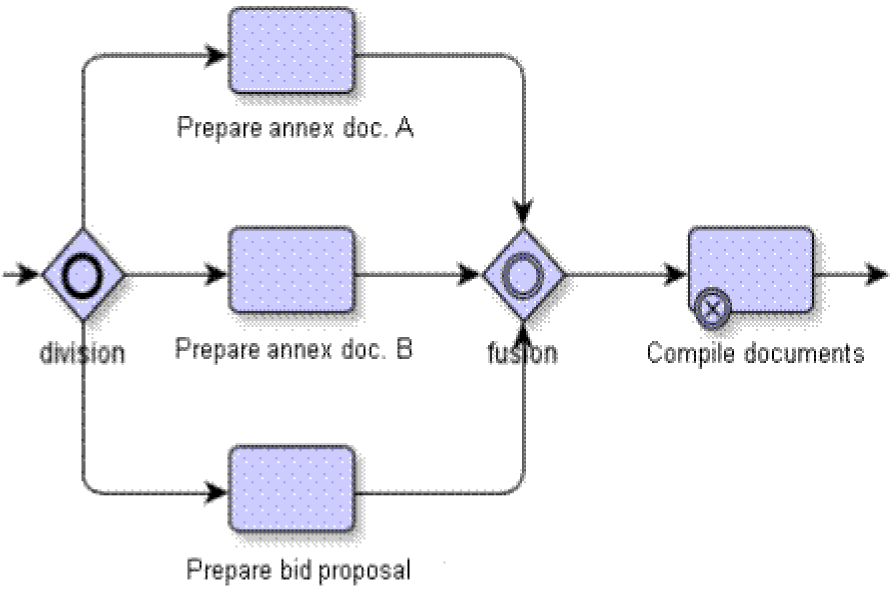
Inclusive division/fusion

 A bold circle into a diamond represents the inclusive division gateway.

Inclusive fusion merges several paths into one after a division.

A double circle into a diamond represents the inclusive division gateway.

Example:

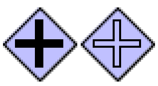


Parallel gateway

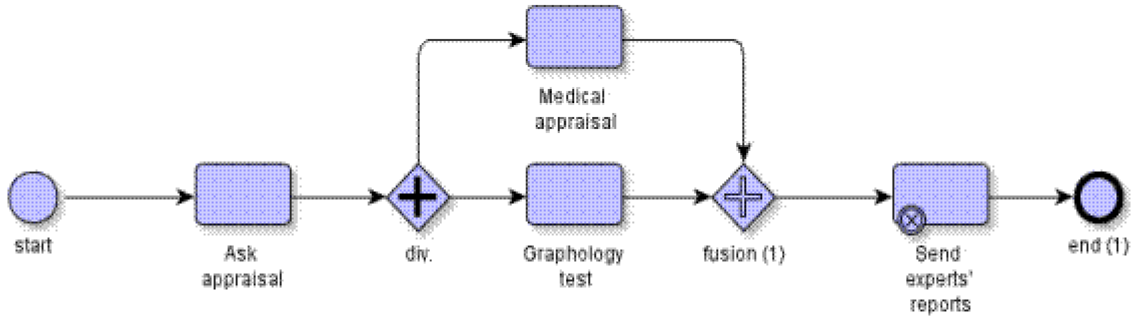
What is a parallel gateway?

Parallel gateways divide the flow in several paths which are **all** taken. The process flow continues through all those paths at the same time.

Parallel division/fusion

 The parallel fusion gateway merges the flows after a parallel division.

Example parallel division/fusion: In this example, the survey report will not be sent until both graphology and *medical reports are finished.*



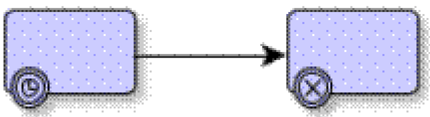
CONNECTORS

WHAT IS A CONNECTOR?

A “connector” is an arrow linking 2 elements in a process graph and symbolizing the workflow.

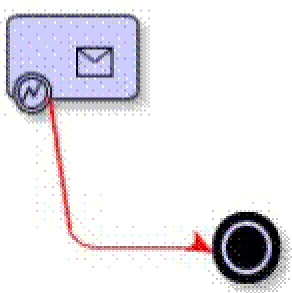
NORMAL FLOW CONNECTOR

When a task generates no exception (**Error** or **Exceeded validate working time**), the connector to the next step of the process is a black arrow:



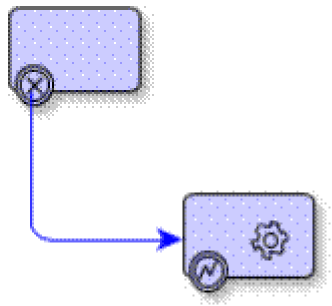
EXCEPTION CONNECTOR

When the task generates an error or its validate working time is exceeded, the connector to the next step of the process is a red arrow:



Estimated working time exceeded connector

When the task's estimated working time is exceeded, the connector to the next step of the process is a blue arrow:



HOW TO DESIGN AND MANAGE A PROCESS

PLANNING

Before starting to design a process using GARGANTUA 7 Administration Tool, it is necessary to prepare it.

First step, determine:

- The **general purpose** of the process: what is it supposed to do? what is its goal and its utility?
- The **documents** that must be attached to it;
- The **different steps** that compose it: tasks for a simple process, tasks and sub-processes for more complex processes;
- Its **actors**:
    - Which role should be the **Process manager**? Any user assigned **Process manager** role can manage the process. The manager can consult the GARGANTUA 7 Process Management module to check out the running processes' progress, as well as the history of finished processes.
    - Which roles should be assigned to execute the tasks?
    - Finally, which users should be assigned to the roles involved in the process?

Second step, draw the process's graph using the BPMN notation described above. If the process contains gateways, you must determine the necessary information which should guide the flow through one path or another. Think each piece of this information (data) may correspond to an attribute inserted in a form assigned to the process.

Example: A mail must be validated by different persons according to the recipient's name. It is therefore necessary to create a "Mail validate" form with a "Recipient" attribute. During the creation of the process, the form must be assigned to it. When the process is started, when the flow arrives to gateway "G" the system looks into the "Recipient" field to select the path to be taken.

DESIGNING A PROCESS

Here is how to design a process using GARGANTUA Administration Tool:

1. In the left pane of the Administration Tool, expand the sub-branch correponding to the database of your choice.
2. Click the **Processes** sub-branch.

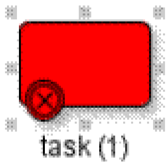
   If some processes have already been created, the process list displays in the right pane.

3. In the bottom left corner of the right pane, click the **New** button.

   In the left pane, the new process displays at the end of the process list. In the right pane, the process management screen displays :

- The **General** tab allows you to provide basic information about the process (**Name**, **Description**...), and to access its deployment history.
- The **Graph** tab allows you to design the process graphically and to set its tasks.
    - At the top of the tab, you can find the elements available to design the process: tasks, events, gateways.
    - Just below, you can find a toolbar allowing to optimize the layout of the process graph.
- The **Properties** tab allows you to set the general settings of the process.
- The **Planner** tab allows you to set a planner for the process. Planners indicate the collaborators' working hours and vacation days. When a planner is assigned to a process, if the process has deadlines or estimated working times (for the process as a whole and/or for some tasks), they are calculated according to those working days and hours.
- The **Scripts** tab allows you to create process scripts, and to associate them to specific tasks.
- For more information on the **Dependencies**, **Compile** and **Log** tabs, see the corresponding chapters of this guide.
- At the bottom, the different commands (**New**, **Delete**, **Apply**, **Compilation**, **Deploy**, **Undeploy**, **Duplicate**, **Undo**, **Redo**, **Export**) allow you to manage the process.

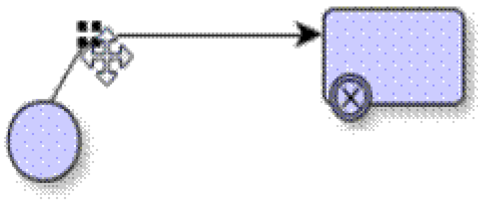
4. In the **Graph** tab, insert and configure the process elements.
5. To insert a process element, drag-and-drop it in the frame below.
6. To move an element, click to select it.



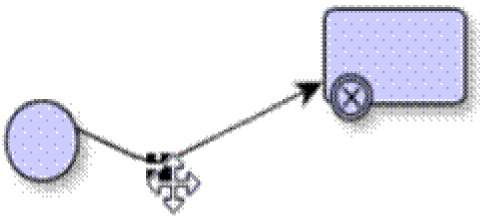
7. Once it is selected, you can drag and drop it to another place.
8. To link two process elements, click one element, then keep pressing the mouse button and move the cursor towards the other element, release once you've properly linked them together.

   A black, red or blue arrow displays to symbolize the process path.

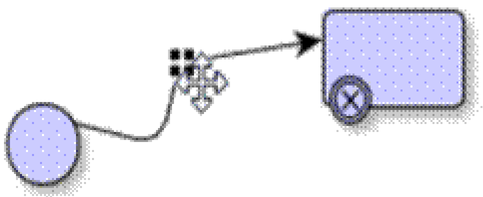
9. To link two elements with an articulated arrow, start a straight arrow as explained above, then release the mouse button a second, then press it again and change the direction while drawing the second part of the arrow.
10. To articulate a straight arrow, click it where you want to articulate it, then move the cursor holding the mouse button, release.



11. To change the articulation's position, click it, then move the cursor holding the mouse button, release.

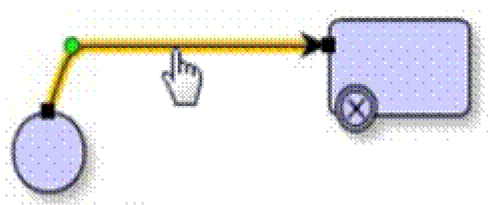


12. To add an articulation, click the arrow where you want to articulate it, then move the cursor holding the mouse button, release.



13. To change the place where the arrow hooked an element, click the arrow to select it.

    The arrow is highlighted in yellow and the articulations (if any) become green:



14. Click one extremity of the arrow, then move the cursor holding the mouse button.
15. Release the mouse button when you've reached the right place.
16. To delete an arrow, select it by clicking it when the cursor becomes a white hand.

    The arrow is highlighted in yellow and the articulations (if any) become green.

17. Press the Delete key on your keyboard.
18. To configure a process element, click it.

    The **Task properties** dialog displays.

19. In the **Task properties** dialog, modify the element's properties (see below for more information on the different elements' properties).
20. Do not forget to save the process even if it is not finished: to save the process, click the **Apply** button at the bottom of the right pane.

PROCESS TOOLBAR

The process toolbar gathers the following tools:

- **No zoom**: allows to cancel a zoom in or zoom out and to resize the process graph to its original size.
- **Fit to window**: allows to fit the process graph size to the screen size.
- **Zoom in**: allows to zoom in.
- **Zoom out**: allows to zoom out.
- **Automatic layout**: allows to carefully and automatically all the process elements.
- **Swim lanes**: allows to reorganize the layout according to swim lanes: each lane contains all the tasks performed by each role.
- **Print**: allows to print the process graph.
- **Show properties**: allows to show and edit the selected task properties.
- **Rename**: allows to rename the selected task.
- **Delete**: allows to delete the selected task.

There is no confirmation message for this operation. However, it is still possible to cancel the task deletion, owing to the Undo button or to the Ctrl + Z shortcut.

- **Delete all**: allows to delete all the process elements.

There is no confirmation message for this operation. However, it is still possible to cancel the task deletion, owing to the Undo button or to the Ctrl + Z shortcut.

- **Copy**: allows to copy the selected task(s).
- **Paste**: allows to paste the selected task(s).
- **Display edge labels**: allows to display all the edge labels.

You must first name the edges in their properties.

- **Show the subgraph for the selected nodes:** allows to view only the task(s) directly related to the selected task.
- **Group all selected**: allows to create a group from a selection of tasks.

- **Exclude from group**: allows to exclude the selected task(s) from a group.
- **Exclude from hierarchy**: allows to exclude a group from a group hierarchy (group included in another group).
- Find: **Find**: allows to find a process task, and to highlight it.
- **Previous matching node**: allows to highlight the previous matching task corresponding to the search bar input.
- **Next matching node**: allows to highlight the next matching task corresponding to the search bar input.
- **Clear highlight**: allows to clear the content of the search bar.

PROCESS ELEMENTS PROPERTIES

GENERAL

Every type of element in the process graph has specific properties that define its behavior within the process.

To display the properties of a process element, double-click it: the element turns red (selected) and the **Task properties** dialog displays.

SHARED PROPERTIES

Here is a description of the properties that are common to most types of process elements:

Identity

Element's basic information

Task name

Modify the name of the selected element in the graph. You can find this field in the parameters of all process elements.

Description

Type or modify a description of the element. You can find this field in the parameters of all process elements.

Role

This drop down list contains the roles of the GARGANTUA database where the process is stored. Select the role involved in the element (task or event).

> ***It is absolutely necessary to assign at least one role to all the tasks and events of a process so that someone (one or more users assigned to the role) is able to intervene and carry out with the work.***

Group

Select the group you want to assign to the selected task.

START EVENT

Here is a description of the properties that are available for the Start event elements:

Form page

If the process' form has several pages, indicate here the page to be displayed by default for the indexation, at process start.

Role

The users assigned to the role selected in this drop-down list can start the process. The process displays in their workflow inbox, in the list of available processes. You can also activate the **Anonymous** option.

Anonymous

Allows **any** user - identified or working in anonymous mode - to start the process.

Automatic start

Allows to automatically start a process, without having a user do it in his inbox. A process can be automatically started by another process, owing to the **Start another process** task; by an IntelliScan task or by the lifecycle of a form.

Actions

Define instructions for the execution of the job to the attention of its executor. These instructions display under the task's name in the workflow inbox in GARGANTUA 7 Web Client.

- To add an action, click , then click in the cells of the table to enter a name, a type and a description.
- To delete an action, select it, then click .

Conditions

You can indicate here conditions to be fulfilled to start the process or to "validate" a task and send it to the next step of the process. These conditions are based on the attributes values.

Example 1: If the "E-mail" attribute is empty, a message displays to inform the user the process cannot start until the attribute is not filled.

It is possible to specify several conditions, each related to the value of a different attribute. The conditions are linked together with boolean operators AND, OR.

Example 2: The validation conditions are the attribute "HRD Validation" is not empty AND the attribute "Director Validation" is "OK". If these conditions are not fulfilled, the task cannot be validated and the process cannot go on by this path.

AND/OR

Select a boolean operator AND or OR to connect the current condition with the previous one.

IF/NOT IF

Select the NOT operator to indicate the value “must not be” as described in the **Attribute**, **Operator** and **Value** columns.

Attribute

Select the attribute where the value must be searched.

Operator

Select an operator to connect the attribute with the value.

Value

Enter the searched value.

- To add a condition, click , then specify the condition.
- To delete a condition, select it, then click .

TASKS

USER TASK

Here is a description of the properties that are available for the User task elements:

If the attribute is not filled during the process, the user assigned through the **Executor of** field is used. If there is no user that corresponds to the **Executor of**, the role assigned to the task is used.

Identity

Task form

Select a form of which the attributes are used for setting up validation conditions in the **Conditions** frame. This form can be different from the form of the process or of any other task.

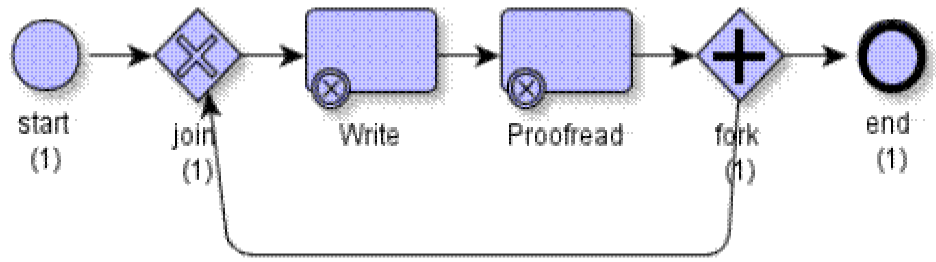
Form page

If the form selected in **Task form** has several pages, you can select the page to be displayed by default when the executor opens the task to do the job.

Executor of

This feature applies to a task located at the beginning of a loop within the process graph. In case the flow comes back to such task, through the loop, you can indicate here that the job must be done again by the executor of another task (or the same if you want the person to do again his or her own work).

Example: In this figure, when the flow reaches the "Proofread" task and the work is considered weak, the flow comes back to the "Write" task. In the "Write" task's properties you can indicate in such case, the job must be done again by the same person who did it the first time, or by the executor of another task considered better qualified to take the work on (remember a task can have several potential executors).



If there is no user that corresponds to the **Executor of**, the role assigned to the task is used.

Attribute

Allows you to specify that the role in charge of the task will be set using the value of a **Roles list** attribute.

> *If there is no **"Roles list"** attribute in the process form, this option is grayed and cannot be used.*

To use this feature, check the **Attribute** checkbox, and select an attribute in the drop-down list. During the process, a user will fill in the process form and select a role in the list corresponding to this attribute. This role will be in charge of the task.

Display the "Documents" frame in the inbox

By checking this checkbox, the **Document** frame will be displayed in the inbox. This frame allows you to add documents, edit them, print them, etc. By leaving this checkbox unchecked, the frame will not be displayed.

Shared Task

By checking this checkbox, you indicate that the selected task has to be done by various users. This task then appears in every assigned user inbox, but will only be done by one user. Indeed, when a user accepts the task, the latter disappears from the other users' inbox. If you wish every user to do the task, check <u>Wait until all the users finish their task</u>.

<u>Wait until all the users finish their task</u>

By checking this checkbox, all the users assigned by a task must finish it. Otherwise, the process will freeze at this stage.

Task cannot be quit

By checking this checkbox, you indicate that the task cannot be given up to another user.

No document operations (simple interface only)

By checking this checkbox, you indicate that no document can be created or added at this stage of the process.

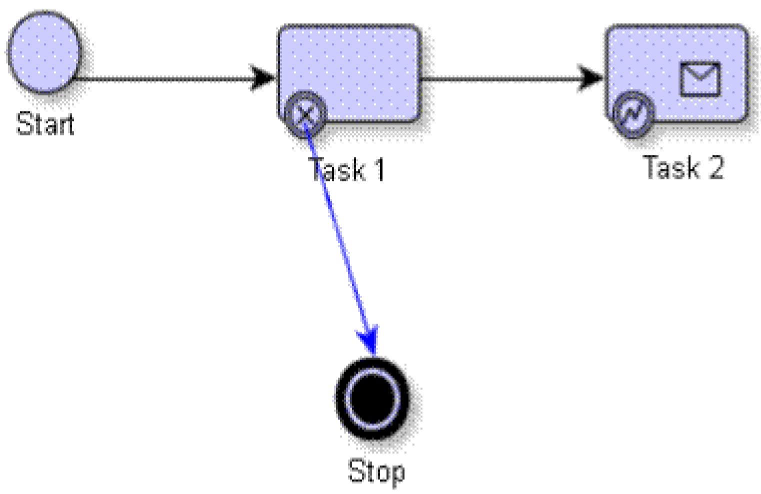
This option is only available for the mail management process.

Deadline

Cancel

Allows you to add an alternative path in case the task is cancelled. Thus, this allows the users to cancel the task, which is not possible otherwise. This alternative path called “exception path” is represented by a blue arrow starting from the  icon attached to the boundary of the task. So the blue arrow is an exception path taken if the user decides to cancel the task.

Example: For some reason “task 1” cannot be validated, the process cannot go on to “task 2”. So the user decides to cancel “task 1” and the process takes the blue exception path. In the following figure, the exception path leads to a Stop event but an exception path can lead to any type of elements: other tasks or a gateway followed by tasks...



The “Cancel” option is meant to provide for an alternative path in case the user decides to cancel the task. If it is activated there must be an exception path, otherwise the compilation of the process generates an error. By default, when you add a user task to the process graph, the  icon is attached to its boundary. But if you do not want an exception path just clear the task’s “Cancel” checkbox.

Estimated working time

Allows you, as an administrator, to indicate a length of time you consider long enough to work out and validate the task.

If this deadline is met, the task is highlighted in red in the users' workflow inbox and the information is recorded in Gargantua 7 Process Manager module. This has no direct consequence on the flow. Estimated working time option is an alert which informs the user it is time to finish and validate the task. It also informs the process manager that the process might be dropping behind.

To indicate an estimated, in the task properties, check **Estimated working time**, and then enter a length of time.

Validate working time

Allows the system to take an alternative path if the task is not validated within a defined length of time. This path called "exception path" is represented by a red arrow starting from the icon attached to the boundary of the task. The red arrow represents the exception path automatically taken by the system. The user cannot intervene in any way to make the flow take that path. By default when you add a user task to the process graph, the icon is attached to its boundary.

To indicate a validate working time, in the task properties, check **Validate working time**, and then enter a time length. In the process graph, add an exception path starting from the icon of the task. This path will be automatically taken in case the validate working time is exceeded.

> ***A task can have at the same time a cancel path, an estimated working time and a validate working time. Logically, for the same task, the estimated working time must be shorter than the validate working time. None of the three options (cancel, estimate working time, validate working time) is mandatory, and they work independently one from each other.***

Actions

You can specify here instructions about the task processing intended for the user who will fulfill the task. These instructions will display under the task name in the Workflow Inbox in the Web Client. To add an action, click , then click the table cells to enter a name, a type and a description. To delete an action, select it, then click .

Conditions

You can indicate here conditions to be fulfilled to start the process or to validate a task and send it to the next step of the process. These conditions are based on the attributes values.

Example 1: If the "E-mail" attribute is empty, a message displays to inform the user the process cannot start until the attribute is not filled.

It is possible to specify several conditions, each one related to the value of a different attribute. The conditions are linked together with boolean operators AND, OR.

Example 2: The validation conditions are the attribute "HRD Validation" is not empty AND the attribute "Director Validation" is "OK". If these conditions are not fulfilled, then the task cannot be validated and the process cannot go on by this path.

AND/OR

Select a boolean operator AND or OR to connect the current condition with the previous one.

IF/NOT IF

Select the NOT operator to indicate the value “must not be” as described in the **Attribute**, **Operator** and **Value** columns.

Attribute

Select the attribute where the value must be searched.

Operator

Select an operator to connect the attribute with the value.

Value

Enter the searched value.

- To add a condition line, click then specify the condition.
- To delete a condition line, select it, then click .

Alerts

1. Select in the drop-down list the role corresponding to the users that will receive alerts.
2. With the help of the button, select the types of alerts to send, and optionally an existing customized e-mail template to send for each alert.

- **Task started**: Send an alert when the workflow reaches the task.
- **Task finished**: Send an alert when the task is finished (possible to go to next task).
- **Task canceled**: Send an alert when the task is canceled.
- **Task due**: Send an alert when the date specified in **Estimated working time** (task properties) is reached.
- **Task expired**: Send an alert when the date specified in **Validate working time** (task properties) is reached.
- **Task accepted**: Send an alert when one of the task’s potential executors accepts the job.
- **Task refused**: Send an alert when one of the task’s potential executors refuses the job.
- **Task assigned**: Send an alert when a task is assigned from the **Process manager** (accessible from the Web Client G Menu, only by members of the DBA group): the alert specifies the name of the new user in charge of the task.
- **Task reassigned**: Send an alert when a task is reassigned from the **Process manager** (accessible from the Web Client G Menu, only by members of the DBA group): the alert only specifies that the used in charge of the task has changed.

3. In the **Recipients** section, fill the fields corresponding to the selected alerts:

- **Attributes**: Click on the button at the right of the field to select a string, e-mail, users list, roles list or groups list attribute, then double-click on the attribute of your choice to validate. The values entered by the user in one of these fields, such as an e-mail address, will be the recipients of the alert.
- **Groups**: Click on the button at the right of the field to enter the name of an existing group, and press

Enter to validate.

- **Roles**: Click on the button at the right of the field to enter the name of an existing role, and press Enter to validate.
- **Users** : Click on the button at the right of the field to enter the name of an existing user, and press Enter to validate.
- **Customized e-mails**: Enter the e-mail address of an external user that does not show in the GARGANTUA users list.

REVIEWER TASK

Here is a description of the properties that are available for the Reviewer task elements:

Identity

Task form

Select a form of which the attributes are used for setting up validation conditions in the **Conditions** frame. This form can be different from the form of the process or of any other task.

Form page

If the form selected in **Task form** has several pages, you can select the page to be displayed by default when the executor opens the task to do the job.

Attribute

Allows you to specify that the role in charge of the task will be set using the value of a **Roles list** attribute.

*If there is no **"Roles list"** attribute in the process form, this option is grayed.*

To use this feature, check the **Attribute** checkbox, and select an attribute in the drop-down list. During the process, a user will fill in the process form and select a role in the list corresponding to this attribute. This role will be in charge of the task.

Display the "Documents" frame in the inbox

By checking this checkbox, the **Document** frame will be displayed in the inbox. This frame allows you to add documents, edit them, print them, etc. By leaving this checkbox unchecked, the frame will not be displayed.

Keep values on restart

By checking this checkbox, all the values entered in the Reviewer task will be retained to avoid filling the form again if the process goes back to this stage later on. The user will still be able to modify the values.

Deadline

Estimated working time

Allows you, as an administrator, to indicate a length of time you consider long enough to work out and validate the task.

If this deadline is met, the task is highlighted in red in the users' workflow inbox and the information is recorded in GARGANTUA 7 Process Manager module. This has no direct consequence on the flow. Estimated working time option is an alert which informs the user it is time to finish and validate the task. It also informs the process manager that the process might be dropping behind.

To indicate an estimated, in the task properties, check Estimated working time, and then enter a length of time.

Validate working time

Allows the system to take an alternative path if the task is not validated within a defined length of time. This path called "exception path" is represented by a red arrow starting from the icon attached to the boundary of the task. The red arrow represents the exception path automatically taken by the system. The user cannot intervene in any way to make the flow take that path. By default when you add a user task to the process graph, the icon is attached to its boundary.

To indicate a validate working time, in the task properties, check **Validate working time**, and then enter a time length. In the process graph, add an exception path starting from the icon of the task. This path will be automatically taken in case the validate working time is exceeded.

> ***A task can have at the same time a cancel path, an estimated working time and a validate working time. Logically, for the same task, the estimated working time must be shorter than the validate working time. None of the three options (cancel, estimate working time, validate working time) is mandatory, and they work independently one from each other.***

Actions

You can specify here instructions about the task processing intended for the user who will fulfill the task. These instructions will display under the task name in the Workflow Inbox in the Web Client. To add an action, click , then click the table cells to enter a name, a type and a description. To delete an action, select it, then click .

Conditions

You can indicate here conditions to be fulfilled to start the process or to validate a task and send it to the next step of the process. These conditions are based on the attributes values.

Example 1: If the "E-mail" attribute is empty, a message displays to inform the user the process cannot start until the attribute is not filled.

It is possible to specify several conditions, each one related to the value of a different attribute. The conditions are linked together with boolean operators AND, OR.

Example 2: The validation conditions are the attribute "HRD Validation" is not empty AND the attribute "Director Validation" is "OK". If these conditions are not fulfilled, then the task cannot be validated and the process cannot go on by this path.

AND/OR

Select a boolean operator AND or OR to connect the current condition with the previous one.

IF/NOT IF

Select the NOT operator to indicate the value “must not be” as described in the **Attribute**, **Operator** and **Value** columns.

Attribute

Select the attribute where the value must be searched.

Operator

Select an operator to connect the attribute with the value.

Value

Enter the searched value.

- To add a condition line, click then specify the condition.
- To delete a condition line, select it, then click .

Alerts

1. Select in the drop-down list the role corresponding to the users that will receive alerts.
2. With the help of the button, select the types of alerts to send, and optionally an existing customized e-mail template to send for each alert.

- **Task started**: Send an alert when the workflow reaches the task.
- **Task finished**: Send an alert when the task is finished (possible to go to next task).
- **Task canceled**: Send an alert when the task is canceled.
- **Task due**: Send an alert when the date specified in **Estimated working time** (task properties) is reached.
- **Task expired**: Send an alert when the date specified in **Validate working time** (task properties) is reached.
- **Task accepted**: Send an alert when one of the task’s potential executors accepts the job.
- **Task refused**: Send an alert when one of the task’s potential executors refuses the job.
- **Task assigned**: Send an alert when a task is assigned from the **Process manager** (accessible from the Web Client G Menu, only by members of the DBA group): the alert specifies the name of the new user in charge of the task.
- **Task reassigned**: Send an alert when a task is reassigned from the **Process manager** (accessible from the Web Client G Menu, only by members of the DBA group): the alert only specifies that the used in charge of the task has changed.

3. In the **Recipients** section, fill the fields corresponding to the selected alerts:

- **Attributes**: Click on the button at the right of the field to select a string, e-mail, users list, roles list or groups list attribute, then double-click on the attribute of your choice to validate. The values entered by the user in one of these fields, such as an e-mail address, will be the recipients of the alert.
- **Groups**: Click on the button at the right of the field to enter the name of an existing group, and press

Enter to validate.

- **Roles**: Click on the button at the right of the field to enter the name of an existing role, and press Enter to validate.
- **Users** : Click on the button at the right of the field to enter the name of an existing user, and press Enter to validate.
- **Customized e-mails**: Enter the e-mail address of an external user that does not show in the GARGANTUA users list.

SUPERVISOR TASK

Here is a description of the properties that are available for the Supervisor task elements:

Identity

Task form

Select a form of which the attributes are used for setting up validation conditions in the **Conditions** frame. This form can be different from the form of the process or of any other task.

Form page

If the form selected in **Task form** has several pages, you can select the page to be displayed by default when the executor opens the task to do the job.

Attribute

Allows you to specify that the role in charge of the task will be set using the value of a **Roles list** attribute.

> *If there is no **"Roles list"** attribute in the process form, this option is grayed.*

To use this feature, check the **Attribute** checkbox, and select an attribute in the drop-down list. During the process, a user will fill in the process form and select a role in the list corresponding to this attribute. This role will be in charge of the task.

If the attribute is not filled during the process, the user assigned through the **Executor of** field is used. If there is no user that corresponds to the **Executor of**, the role assigned to the task is used.

Display the "Documents" frame in the inbox

By checking this checkbox, the Document frame will be displayed in the inbox. This frame allows you to add documents, edit them, print them, etc. By leaving this checkbox unchecked, the frame will not be displayed.

Task cannot be quit

By checking this checkbox, you indicate that the task cannot be given up to another user.

Review task

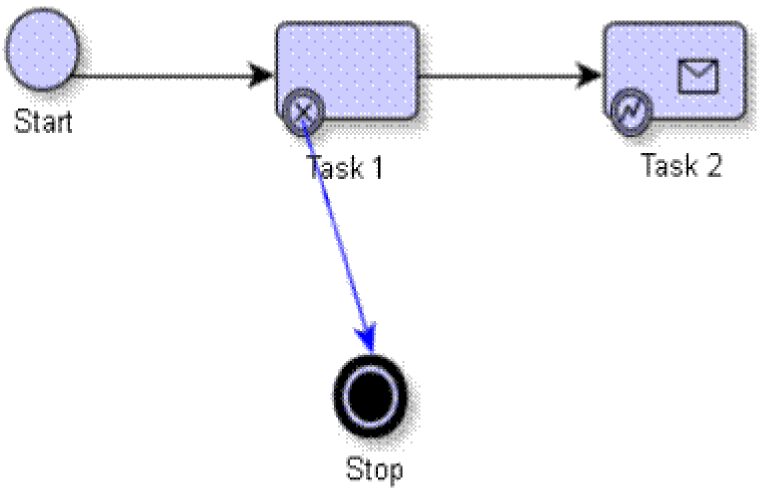
Select the Reviewer task to associate to the selected Supervisor task. Thus, the values entered in the Reviewer task form will be used in the selected Supervisor task form.

Deadline

Cancel

Allows you to add an alternative path in case the task is cancelled. Thus, this allows the users to cancel the task, which is not possible otherwise. This alternative path called "exception path" is represented by a blue arrow starting from the  icon attached to the boundary of the task. So the blue arrow is an exception path taken if the user decides to cancel the task.

Example: For some reason "task 1" cannot be validated, the process cannot go on to "task 2". So the user decides to cancel "task 1" and the process takes the blue exception path. In the following figure, the exception path leads to a Stop event but an exception path can lead to any type of elements: other tasks or a gateway followed by tasks...



*The "**Cancel**" option is meant to provide for an alternative path in case the user decides to cancel the task. If it is activated there **must** be an exception path, otherwise the compilation of the process generates an error. By default, when you add a user task to the process graph, the  icon is attached to its boundary. But if you don't want an exception path just clear the task's "**Cancel**" checkbox.*

Estimated working time

Allows you, as an administrator, to indicate a length of time you consider long enough to work out and validate the task.

If this deadline is met, the task is highlighted in red in the users' workflow inbox and the information is recorded in Gargantua 7 Process Manager module. This has no direct consequence on the flow. Estimated working time option is an alert which informs the user it is time to finish and validate the task. It also informs the process manager that the process might be dropping behind.

To indicate an estimated, in the task properties, check Estimated working time, and then enter a length of time.

Validate working time

Allows the system to take an alternative path if the task is not validated within a defined length of time. This path called “exception path” is represented by a red arrow starting from the icon attached to the boundary of the task. The red arrow represents the exception path automatically taken by the system. The user cannot intervene in any way to make the flow take that path. By default when you add a user task to the process graph, the icon is attached to its boundary.

To indicate a validate working time, in the task properties, check **Validate working time**, and then enter a time length. In the process graph, add an exception path starting from the icon of the task. This path will be automatically taken in case the validate working time is exceeded.

> ***A task can have at the same time a cancel path, an estimated working time and a validate working time. Logically, for the same task, the estimated working time must be shorter than the validate working time. None of the three options (cancel, estimate working time, validate working time) is mandatory, and they work independently one from each other.***

Actions

You can specify here instructions about the task processing intended for the user who will fulfill the task. These instructions will display under the task name in the Workflow Inbox in the Web Client. To add an action, click , then click the table cells to enter a name, a type and a description. To delete an action, select it, then click .

Conditions

You can indicate here conditions to be fulfilled to start the process or to validate a task and send it to the next step of the process. These conditions are based on the attributes values.

Example 1: If the “E-mail” attribute is empty, a message displays to inform the user the process cannot start until the attribute is not filled.

It is possible to specify several conditions, each one related to the value of a different attribute. The conditions are linked together with boolean operators AND, OR.

Example 2: The validation conditions are the attribute “HRD Validation” is not empty AND the attribute “Director Validation” is “OK”. If these conditions are not fulfilled, then the task cannot be validated and the process cannot go on by this path.

AND/OR

Select a boolean operator AND or OR to connect the current condition with the previous one.

IF/NOT IF

Select the NOT operator to indicate the value “must not be” as described in the **Attribute**, **Operator** and **Value** columns.

Attribute

Select the attribute where the value must be searched.

Operator

Select an operator to connect the attribute with the value.

Value

Enter the searched value.

- To add a condition line, click then specify the condition.
- To delete a condition line, select it, then click .

Alerts

1. Select in the drop-down list the role corresponding to the users that will receive alerts.
2. With the help of the button, select the types of alerts to send, and optionally an existing customized e-mail template to send for each alert.

- **Task started**: Send an alert when the workflow reaches the task.
- **Task finished**: Send an alert when the task is finished (possible to go to next task).
- **Task canceled**: Send an alert when the task is canceled.
- **Task due**: Send an alert when the date specified in **Estimated working time** (task properties) is reached.
- **Task expired**: Send an alert when the date specified in **Validate working time** (task properties) is reached.
- **Task accepted**: Send an alert when one of the task's potential executors accepts the job.
- **Task refused**: Send an alert when one of the task's potential executors refuses the job.
- **Task assigned**: Send an alert when a task is assigned from the **Process manager** (accessible from the Web Client G Menu, only by members of the DBA group): the alert specifies the name of the new user in charge of the task.
- **Task reassigned**: Send an alert when a task is reassigned from the **Process manager** (accessible from the Web Client G Menu, only by members of the DBA group): the alert only specifies that the used in charge of the task has changed.

3. In the **Recipients** section, fill the fields corresponding to the selected alerts:

- **Attributes**: Click on the button at the right of the field to select a string, e-mail, users list, roles list or groups list attribute, then double-click on the attribute of your choice to validate. The values entered by the user in one of these fields, such as an e-mail address, will be the recipients of the alert.
- **Groups**: Click on the button at the right of the field to enter the name of an existing group, and press Enter to validate.
- **Roles**: Click on the button at the right of the field to enter the name of an existing role, and press Enter to validate.
- **Users** : Click on the button at the right of the field to enter the name of an existing user, and press Enter to validate.
- **Customized e-mails**: Enter the e-mail address of an external user that does not show in the GARGANTUA users list.

AUTOMATIC TASK

This task is automatically executed thanks to a script to be written in the **Script editor**, in the **Task properties** dialog.

Once the script is executed, the process keeps going automatically through this path to next stage.

Under the **Scripts** tab of the process management screen, you can also view and edit all scripts associated to each automatic task in the process (see Script editor).

E-MAIL TASK

Here is a description of the properties that are available for the E-mail task elements:

Content tab

Recipients and options

To

Enter manually the e-mail address of the recipient(s). Or, add a recipient that will be chosen dynamically, depending on attribute values, or on the executor of a given task:

- Click on the button at the right of the field, to select an attribute (can be a string, e-mail, users list, roles list, or groups list attributes), then double click on the attribute of your choice to validate. The user that fills the form with this attribute enters/selects a value for this field, and this value will become the recipient of the mail.

  Example 1: you select an e-mail attribute, called Recipient. The user that fills the form enters the e-mail address of John Smith in the Recipient attribute. Therefore, it will be John Smith that will receive the e-mail.

  Example 2: you select a Users list attribute. The user that fills the form selects John Smith in this Users list. Therefore, it will be John Smith that will receive the e-mail.

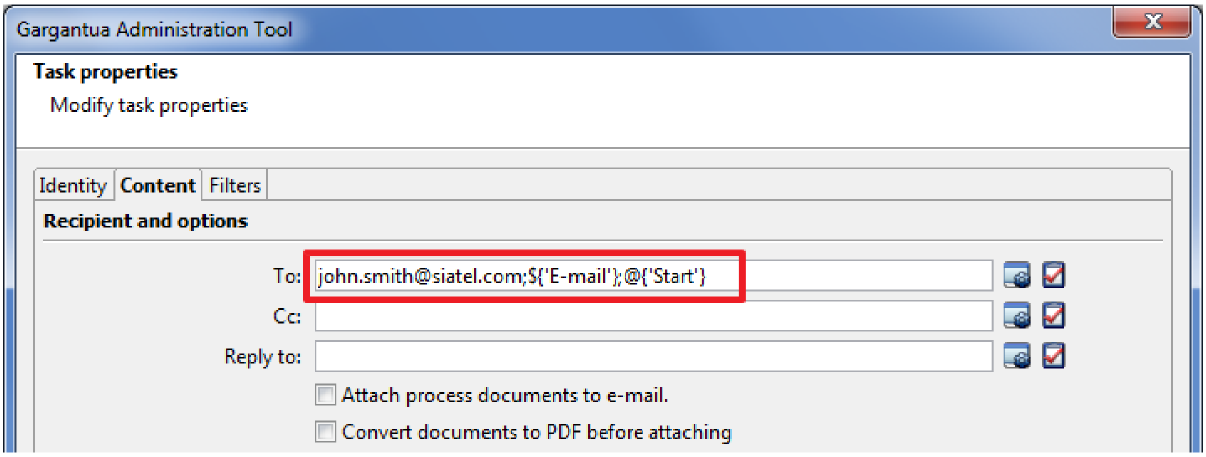
  Warning: for Users/roles/groups list attributes, it is mandatory to indicate the e-mail addresses of the users, in the Users branch.

- Click on the button at the right of the field, then double click on the task of your choice. The user that has executed the selected task will become the recipient of the e-mail.

  Warning: it is mandatory to indicate the e-mail address of the task executor, in the Users branch.

You can mix the three types of recipients described above, by making sure to separate them with the ";" symbol.

For example:



In the example shown above, we chose 3 recipients:

1. *john.smith@siatel.com;*
2. *The e-mail adress entered by the user in the "E-mail" field;*
3. *The executor of the "Start" task.*

Cc

Enter the e-mail of the copied recipient(s). See #To to know how to add an executor or an attribute value.

Reply to

Enter the e-mail address that will be automatically displayed in the "To" field (recipient), if you replay to the received mail, from your e-mail client. Indeed, if you want to reply to the received mail and that you do not fill in this field, then the recipient of the reply is, by default, the GARGANTUA server. See #To to know how to add an executor or an attribute value.

Attach process documents to e-mail

Check this checkbox to send process documents as attachments.

Message

E-mail template

Select in the drop-down menu an existing e-mail template.

Subject

Enter the subject of the message. Select, optionally, as the e-mail subject:

- An attribute value, with the help of the button;
- The name of the executor of a task, with the help of the button.

Body

Type the text of the message. Select, optionally, as the e-mail body:

- An attribute value, with the help of the button;

- The name of the executor of a task, with the help of the button.

Language

If you have selected a document template in the **Message** section, and the latter was translated in several languages, then you can check the languages in which you want to the e-mail to be sent.

For example, if you check the English, French and Spanish languages, then the sent e-mail will be translated into these three languages, one after another.

Objet : New mail in GED / Nouveau courrier en GED / Nuevo correo en GED

Hello,

A new mail has been digitized and sent to EDM.

The IT service.

Bonjour,

Un nouveau courrier a été numérisé et archivé en GED.

Le service informatique

Buenos días,

Un nuevo correo ha sido digitalizado y enviado en GED.

El servicio informático.

Filters tab

This tab allows you to filter the process documents to send by mail.

The filters feature can only work if you have checked the Attach process documents to e-mail checkbox, in the Content tab.

Action

1. Click on to specify the documents to include or exclude from the e-mail sending.
2. Choose **Include** or **Exclude** in the drop-down list of the **Action** field.
3. Indicate conditions in the table below, that have to be fulfilled to include or exclude the

documents from the e-mail sending. These conditions are based on the attributes values.

Example 1: if the "Date of reception" attribute contains a date previous to the 1st of May 2016, then the process documents are sent by mail.

It is possible to specify several conditions, each one related to the value of a different attribute. The conditions are linked together with boolean operators AND, OR.

Example 2: the conditions for sending documents by mail are: the "Invoice amount" attribute is higher than "10000€" AND the "Accountant validation" is equal to "OK". If these conditions are not met, then the process documents are not sent by mail.

- To add a condition line, click then specify the condition.
- To delete a condition line, select it, then click .

IF/NOT IF

Select the NOT IF operator to indicate the value "must not be" as described in the **Attribute**, **Operator** and **Value** columns.

Filter

Select the attribute where the value must be searched.

Operator

Select an operator to connect the attribute with the value.

Value

Enter the searched value.

AND/OR

Select a boolean operator AND or OR to connect the current condition with the previous one.

4. Click on **OK**.
5. Repeat this procedure to add other conditions for including or excluding process documents from the e-mail sending.

Start another process task

Here is a description of the properties that are available for the Start another process task elements:

Identity

Process definition

Select the process to be started automatically among those published in the same GARGANTUA database.

Start-point

Select the starting point of the process specified in **Process definition**, if it has several.

Copy attributes

If the main process' form and the sub-process' form (specified in **Process definition**) have attributes in common, this option allows you to copy out the values entered in the form of the main process during its execution, into the sub-process' form. This makes such data available for the sub-process executor.

Letting the Copy attributes checkbox clear avoids transferring the data to the sub-process' executor for confidentiality reasons, for example.

Copy documents

Copies the documents added during the execution of the main process in order to make them available for the executor of the sub-process (specified in **Process definition**).

Letting the Copy documents checkbox clear avoids transferring these documents to the sub-process executor for confidentiality reasons, for example.

Copy name

Copies the value of the process **Name** system field and gives it to the sub-process.

Filters

Allows to add inclusion or exclusion conditions, to specify which documents have to be transferred from the main process to the sub-process (sub-process is defined in the **Process definition** field).

> ***To add conditions, the Copy documents option must be checked.***

If no condition is defined here, then all the documents will be transferred from the main process to the sub-process.

To specify the documents to be transferred from the main process to the sub-process:

1. Click on the **Filters** tab.
2. Click on **Add**.

   The Filter conditions window is displayed.

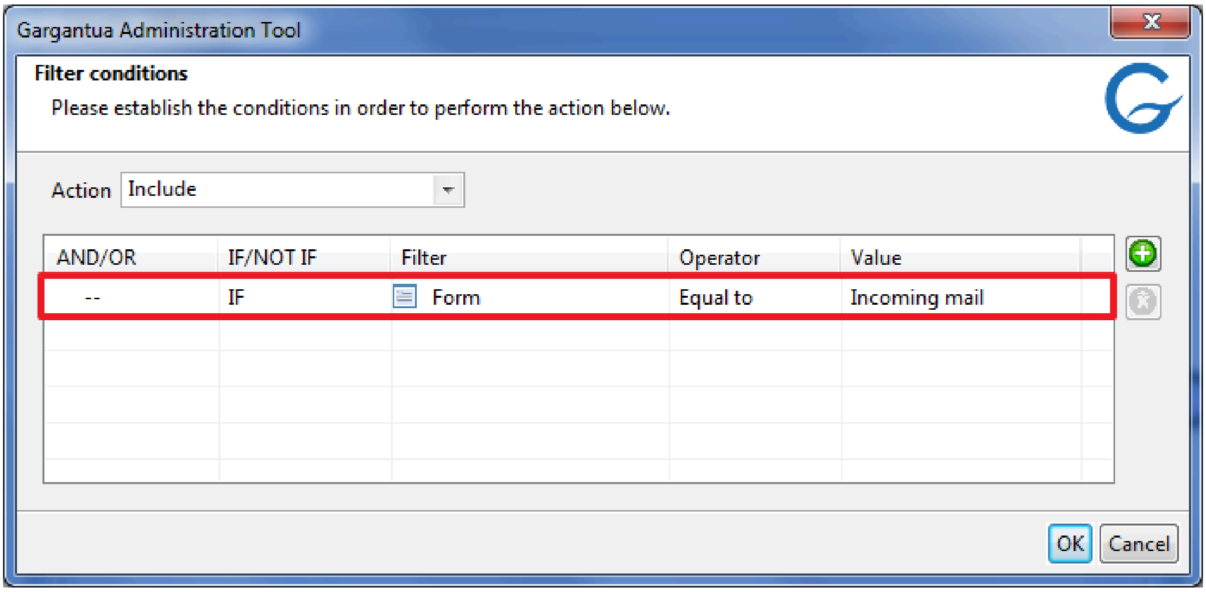
3. In the drop-down list of the **Action** field, select **Include**.
4. In the table, click on **Add** to specify a condition.

   The condition line is displayed in the table.

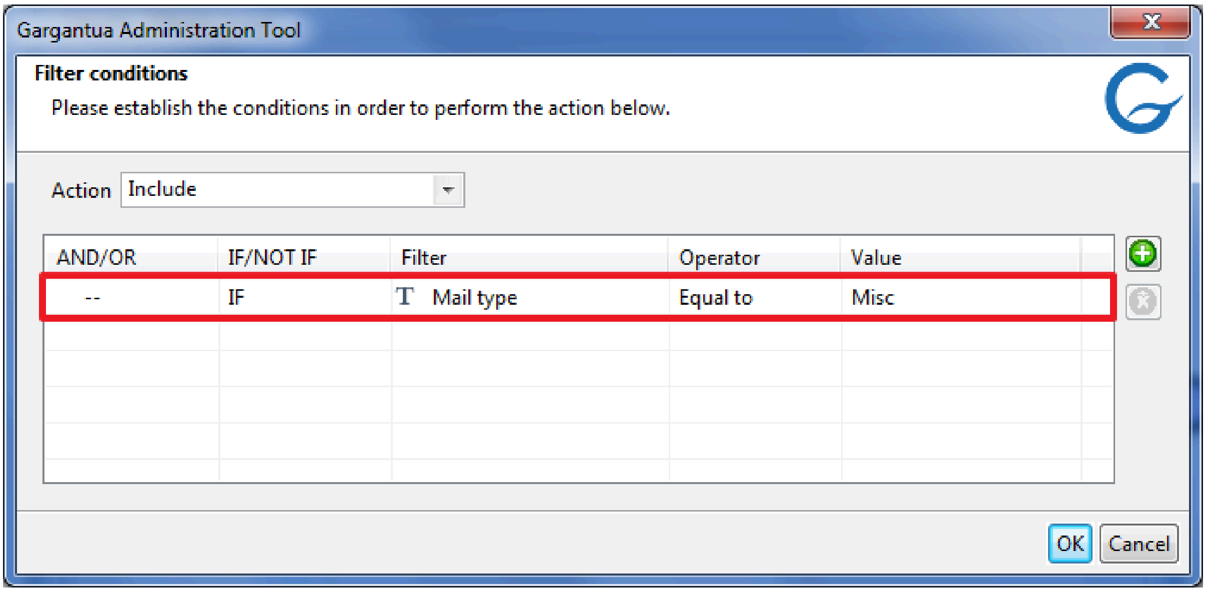
5. Fill in the condition:
   - **IF/NOT IF**: select the NOT IF operator to indicate the value "must not be" as described in the **Attribute**, **Operator** and **Value** columns.

- **Filter**: select the attribute where the value must be searched. You can also select **Form**, to apply the condition on the form specified in the **Value** field.
- **Operator**: select an operator to connect the attribute with the value.
- **Value**: enter the searched value, or select a form, if you chose **Form** in the **Filter** field.

- *Example 1: to indicate that all the documents associated to the “Incoming mail” form must be transferred from the main process to the sub-process, specify the following condition:*

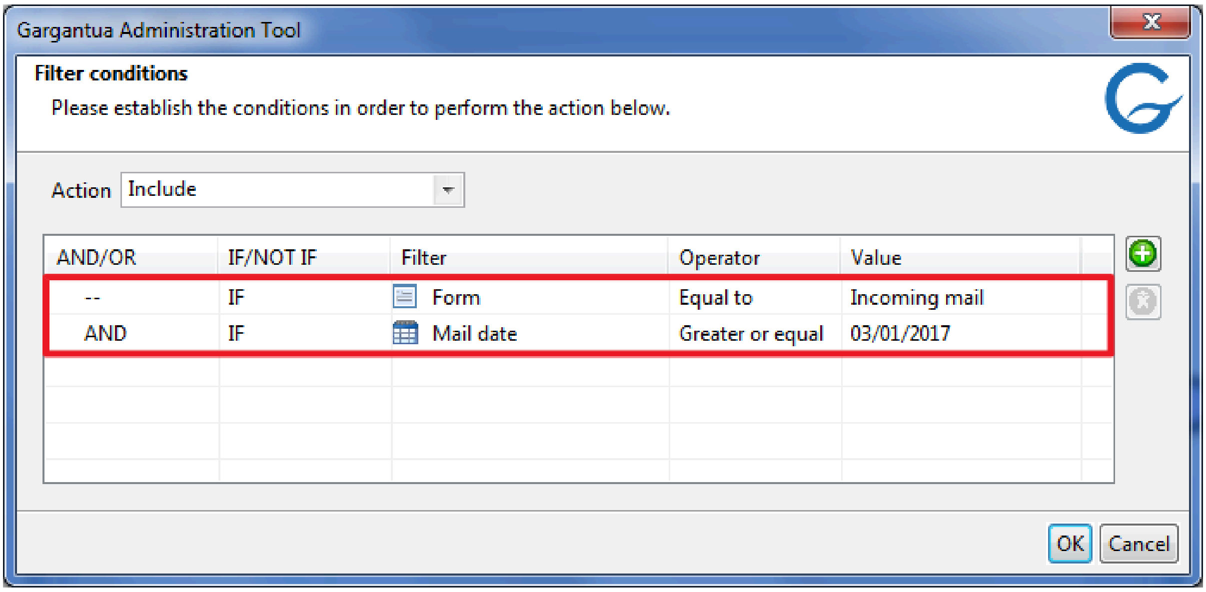


- *Example 2: to indicate that all the documents for whom the value “Misc” has been entered for the attribute “Mail type” must be transferred from the main process to the sub-process, specify the following condition:*



6. Repeat optionnally steps 4 to 5 to add one or more conditions.

- For each new condition, fill in the **AND/OR** field: select a boolean operator AND or OR to connect the current condition with the previous one.
- *For example: to indicate that all the documents associated to the “Incoming mail” form AND for whom the value entered in the attribute “Mail date” is greater than “03/01/2017”, must be transferred from the main process to the sub-process, specify the following conditions:*



7. Click on **OK**.

   You have specified the documents to be transferred from the main process to the sub-process: the conditions are displayed in the table of the Filters tab.

To specify the documents NOT to be transferred from the main process to the sub-process:

1. Click on the **Filters** tab.
2. Click on **Add**.

   The Filter conditions window is displayed.

3. In the drop-down list of the **Action** field, select **Exclude**.
4. In the table, click on **Add** to specify a condition.

   The condition line is displayed in the table.

5. Fill in the condition:
   - **IF/NOT IF**: select the NOT IF operator to indicate the value “must not be” as described in the **Attribute**, **Operator** and **Value** columns.
   - **Filter**: select the attribute where the value must be searched. You can also select **Form**, to apply the condition on the form specified in the **Value** field.
   - **Operator**: select an operator to connect the attribute with the value.
   - **Value**: enter the searched value, or select a form, if you chose **Form** in the **Filter** field.

6. Repeat optionnally steps 4 to 5 to add one or more conditions.
    - For each new condition, fill in the **AND/OR** field: select a boolean operator AND or OR to connect the current condition with the previous one.
7. Click on **OK**.

    You have specified the documents NOT to be transferred from the main process to the sub-process: the conditions are displayed in the table of the Filters tab.

    To edit an existing condition:

    1. Click on the **Filters** tab.
    2. Select the condition you want to edit.
    3. Click on **Edit a condition**.

        The condition is displayed in the Filter conditions window.

    4. Edit the condition.
    5. Click on **OK**.

        You have edited an existing condition.

    To delete a condition:

    1. Click on the **Filters** tab.
    2. Select the condition you want to delete.
    3. Click on **Delete a condition**.

        You have deleted a condition.

Script editor

Writing a script allows to perform custom actions before the sub-process is launched.

EDM Task

An EDM task has the following properties:

Target

The **Target** frame allows you to select the type of objects to be created in the Gargantua database. At the end of the process execution, the generated objects are placed in the last-level folder of the tree structure defined in the **Folder**/**Document**/**Pin**.

The folders of the tree structure are created only if they do not already exist. The target objects (folder, documents or pin) are created at the end of every execution of the process. Example: A folder tree ordered by initial letter of the name has been set. At the end of the execution of the process for Mr Brown, the "B" folder is created. It contains a "Brown" folder. Afterwards, at the end of the execution of the process for Mr Black, the "Black" folder is directly placed in the existing "A" folder.

Folder

A folder containing the process documents will be created. The folder (represented by the icon in the **Folder** frame) will get the form selected in the **Form** drop-down list for this level. The documents will keep the form set during upload.

Document

The process documents will be directly added into the last-level folder of the tree structure (**Document** frame). They will keep the form set during upload.

Pin

A pin containing the process documents will be created. The pin (represented by the icon in the **Pin** frame) will get the form selected in the **Form** drop-down list for this level. The documents will keep the form set during upload.

Checkboxes

- **Create classification regardless of process documents**: at the end of the execution of the process, the classification defined in the **Folder/Document/Pin** frame will be created, even if no document has circulated in the process. For instance, if you chose to create a folder that includes the process documents, but the process does not include any document, then the folder will still be created, but will be empty.
- **Create document instead of pin with only one component**: if you selected **Pin** in the **Target** frame, but there is only one document transferred in EDM at the end of the process, then this document will be displayed "alone", without any pin. Indeed, it does not seem logical to have a pin that includes only one document.

Folder/Document/Pin

Define the structure and name composition of the objects added into the GARGANTUA database:

- If you selected **Folder** in the **Target** frame, a green folder stands for the folder object created and indexed. It is meant to store the documents and intermediate classification folders, if any.
- If you selected **Document** in the **Target** frame, a yellow folder stands for the process documents themselves, if you do not add intermediate classification folders. In every instance, the yellow folder of last level stands for the added documents.
- If you selected **Pin** in the **Target** frame, a icon stands for the pin object created and indexed. It is meant to contain the documents.

In all cases (**Folder**, **Document** or **Pin**), you can add one or several classification subfolders, which are indexed and thus can be assigned different forms. You must indicate which attribute values the name of the folder and/or the classification folder(s) should be composed of:

- To indicate the name composition of an object or classification folder, select it in the left frame. From the frame in the middle, select an attribute, then move it to the right frame by clicking .
- You can also insert a fix character string in the name by clicking .
- To delete a part of the name select it, then click .
- To modify the order of the name parts, select a part then click or to move it up or down.

Form

The **Form** drop-down list allows you to select an indexation form for the object selected in the classification tree structure (**Folder**/**Document**/**Pin**). This means in the GARGANTUA database every object - classification folders or documents themselves - can have a different indexing form.

Copy attributes

If the process form and the form(s) (selected in **Form**) assigned to each object of the tree structure (**Folder**/**Document**/**Pin**) have attributes in common, this function allows you to copy out the values from the process form into the forms of the objects.

Options

Synchronization

Type

The **Synchronization** drop-down list allows you to save the documents as major or minor version of existing documents of same name. You can also replace the existing documents by the process documents.

> *This option requires the process to be started from a document located in the explorer (and not from the My tasks tab), by using the Start process feature.*

Comment

Allows to select an attribute whose value will be displayed as a version comment, in the major or minor version of the document.

> *To view the comments of a document, use the* ***"Document information"*** *feature, available in the document toolbar.*

Options

Delete documents from process

When this checkbox is checked, documents from the process are deleted from the process, after they are added in the GARGANTUA database.

Convert documents to index cards

When this checkbox is checked, the files associated to the process documents are deleted. Only the attributes are kept as cards.

Process attributes

Create card

If you check this checkbox, process attributes will be kept as cards. The drop-down list under the **Create card** option allows you to choose the indexation form for the created cards.

Create pdf

If you check this checkbox, the process form will be converted in a PDF file. The drop-down list under the **Create pdf** option allows you to choose the indexation form for the created PDF.

You can also check the **Copy process attributes** checkbox to display form attribute values in the PDF file. If you do not check this checkbox, no attribute value will be copied in the PDF file, and attribute fields will be empty.

The Create PDF feature can work only if you configured the HTML to PDF server plugin. For more information on this plugin configuration, check the chapter Configuring HTML to PDF plugin of the GARGANTUA server installation guide.

Filters tab

This tab allows you to filter the process documents to send to EDM.

Action

1. Click on ⊕ to specify the documents to send to EDM.
2. Indicate conditions in the table below, that have to be fulfilled to send process documents to EDM. These conditions are based on the attributes values.

   Example 1: if the "Date of reception" attribute contains a date previous to the 1st of May 2016, then the process documents are sent to EDM.

   It is possible to specify several conditions, each one related to the value of a different attribute. The conditions are linked together with boolean operators AND, OR.

   Example 2: the conditions for sending documents by mail are: the "Invoice amount" attribute is higher than "10000€" AND the "Accountant validation" is equal to "OK". If these conditions are not met, then the process documents are not sent to EDM.

- To add a condition line, click ⊕ then specify the condition.

- To delete a condition line, select it, then click .

  IF/NOT IF

  Select the NOT operator to indicate the value "must not be" as described in the **Attribute**, **Operator** and **Value** columns.

  Filter

  Select the attribute where the value must be searched.

  Operator

  Select an operator to connect the attribute with the value.

  Value

  Enter the searched value.

  AND/OR

  Select a boolean operator AND or OR to connect the current condition with the previous one.

4. Click on **OK**.
5. Repeat this procedure to add other conditions for sending process documents to EDM.

Security task

Here is a description of the properties that are available for the Security task elements:

Rules

Specify the rules according to which security profile(s) should be assigned to the documents: each rule associates a condition to a profile.

The order in which the rules are listed matters because they are evaluated accordingly: as soon as a condition is fulfilled, the corresponding security profile is assigned to the document and the rest of the rules are ignored.

- To add a rule, click , and specify the rule.
- To delete a rule, select it, and click .
- To rearrange the rules, select one, and click or to move it upwards or downwards.

Property

Select the criterion to use in order to know whether the condition is fulfilled. Possible criteria are: the type of the file for the document, its form or the contents of the **Label** system attribute.

Operator

Select an operator in order to compare the criterion to the appropriate value.

Value

Enter the value to match.

Security profile

Select the security profile to assign to the documents that fulfill the current condition.

SIGNATURE TASK

Here is a description of the properties that are available for the Signature task elements:

Rules

Each line in the table contains a rule determining whether the document should be signed/encrypted or not.

- To add a rule, click , and specify the condition.
- To delete a rule, select it, and click .
- To rearrange the rules, select one, and click or to move it upwards or downwards.

Property

Criterion to use in order to determine whether the document fulfills the rule or not. Possible criteria are: the file type, the form for the document, or the contents for the **Label** field.

Operator

Operator to use when evaluating the condition: **Equal with**, **Not equal with**, **Contains**, **Starts with**, **Ends with**.

Value

Enter or select the value you want to compare with the document's characteristics in order to determine whether the rule is fulfilled.

Action

Select the action you want to perform on the documents that fulfill the rule: **Sign digitally**, **Encrypt**.

Certificate

If the rule is used in order to sign documents digitally, select the appropriate server certificate.

DOCUMENT TEMPLATE TASK

Here is a description of the properties that are available for the Document template task elements:

Document templates

Each line of the **Document templates** table contains a document template to associate to the task, and the conditions to fulfill so the task can be performed.

To associate a document template to the task and configure it:

1. Click at the right of the **Document templates** table.

   The Conditions dialog window opens.

2. Select the document template to associate to the task, in the drop-down menu of the **Document template** field, as well as its form, in the **Form** field.
3. Add, if necessary, one or more condition(s) for the realization of the task, by clicking at the right of the **Conditions** table, and by specifying the condition(s).
   - To delete a condition, select it, and click at the right of the **Conditions** table.
4. Check, if necessary, the following checkboxes:
   - **Copy attributes**: all the form attribute values attached to the document template will be displayed on the left explorer pane, beside the document template.
   - **Copy only attributes from document template**: only the attribute values included in the document template will be displayed on the left explorer pane, beside the document template.

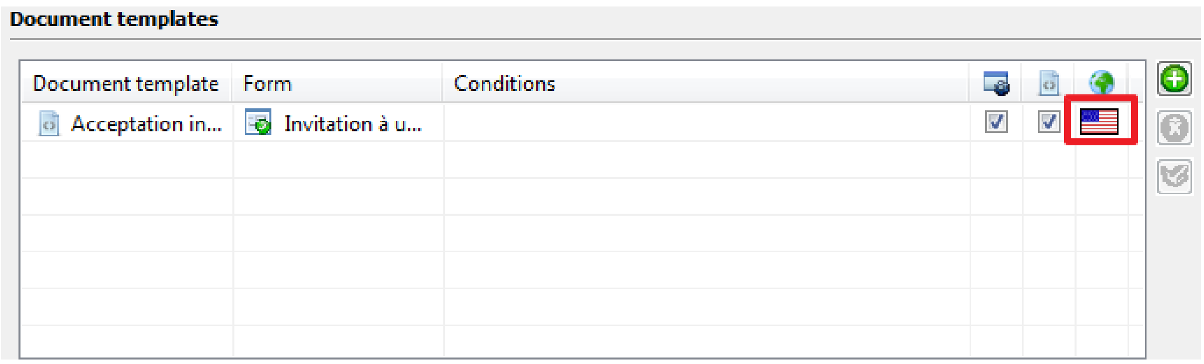
   > *If you do not check the checkboxes, the attribute values will not be displayed in the explorer.*

5. Check, optionally, the checkboxes corresponding to the languages of the document template. Thus, the selected document template in the Document template field will be generated in the selected language(s).

   For example, if you check the Français and English languages, the document template will be generated in French as well as in English.

6. Click **OK**.

   The Conditions dialog closes. In the Document templates table, the flag of the document template language that you want to generate is displayed in the Language column.



   If you checked several languages, the icon is displayed instead of the flag.

7. Click **OK** to save the task.

   You have associated a document template to the task, and configured it.

SET ATTRIBUTE TASK

Here is a description of the properties that are available for the Set attribute task elements:

Conditions

Each line of the table contains an attribute and the value that will be automatically assigned to it, depending on the specified condition(s).

- To define the attribute to be automatically filled, click on , then select the attribute in the Conditions dialog drop-down list, and enter the value to assign to it automatically.
- To add a condition for the assignment of the value, click on , then specify the condition.
- To delete a condition, select it, then click on .

CHANGE PRIORITY TASK

Here is a description of the properties that are available for the Change priority task elements:

Conditions

This table allows you to add conditions based on attribute values, that will change the process priority. Each line of the table matches one or several specific conditions at a different level of priority.

To add a condition to change the priority of the process:

1. Click on at the right of the **Conditions** table.

   The Conditions dialog is displayed.

2. Select a priority for the condition you are about to define, in the **Priority** field:
   - Critical, Important, High, Normal, Low, Lowest: the process and its tasks will now have one of those levels of priority.
   - Elevate one, two, three units, Demote one, two, three units: the priority of the process and its tasks will increase or demote one, two or three levels compared to the priority that has been defined in the **Properties** tab.

     For example, the priority of the process is Critical in the Properties tab. If you select Demote three units, then the priority of the process and its tasks will be demoted to Normal level.

3. Click on to add a condition, in the **Conditions** table.

   A line of condition is now displayed in the Conditions table.

4. Specify the condition with the help of the available attributes, in the **Attributes** field of the table. The attributes that are displayed match those that are in the form that has been defined as the process form, in the **Properties** tab.
5. Repeat steps 3 and 4 to add a specific condition to the level of priority selected previously.

6. Click on **OK**.

   The Conditions dialog window closes. The specified conditions are now displayed in the Conditions table.

   You have added a condition to change the priority of the process.

7. Repeat optionnally steps 1 to 6 to add other conditions specific to other levels of priority.

At the right of the **Conditions** table, several options are available:

- Add one or more condition(s) specific to a level of priority.
- Delete the selected condition.
- Edit the selected condition.
- / Move up or down the condition in the table.

XML EXPORT TASK

Here is a description of the properties that are available for the XML export task elements:

Content tab

- **Export destination**: folder that will be created to store the XML file (that includes the forms and the process and documents' attribute values), the process documents and log:
  - **Attributes**: the name of the folder will take the value of the selected attribute.

    For example, you select an attribute called Mail recipient. The user fills this attribute by the City hall value. Thus, the name of the folder will be City hall.

  - **Process markers**: the name of the folder will take the value of the selected process marker.

    For example, you select the process marker Start date. The user starts the process on the 2016/01/08. Thus, the name of the folder will be 2016/01/08.

  - **Other markers**:
    - Siatel server path: the name of the folder will take the generic name of the Siatel server.
- **Export name**: name that the archive will have (.zip or .tgz), and that includes the XML file, the process documents and log.
- **Attach process documents to export**: to add the process documents to the export file. Also allows to add filters to include or exclude some documents to the export file, in the **Filters** tab.

Filters tab

This table allows you to add conditions based on attribute values, and that will ensure that the process documents will be exported or not. Each line of the table matches one or more specific condition(s) to an action: exclude or include the documents.

Adding filters is only possible if you have checked the Attach process documents to export, in the Content tab.

To add a condition to include or exclude documents:

1. Click on at the right of the table.

   The Filter conditions is displayed.

2. Select an action for the condition you are about to define, in the **Action** field:
   - **Include**: the documents that fulfill the condition criteria will be exported;
   - **Exclude** : the documents that do not fulfill the condition criteria will not be exported.
3. Click on to add a condition in the table.

   A line of condition is displayed in the table.

4. Specify the condition with the attributes available in the **Filters** field of the table. The attributes that are displayed match those in the database in which is located the process.
5. Repeat steps 3 and 4 to add a specific condition to the action previously selected.
6. Click on **OK**.

   The Filter conditions closes. The specified condition(s) are displayed in the table.

   You have added a condition to include or exclude documents.

7. Repeat optionnally steps 1 to 6 to add other specific conditions to another action.

At the right of the **Conditions** table, several options are available:

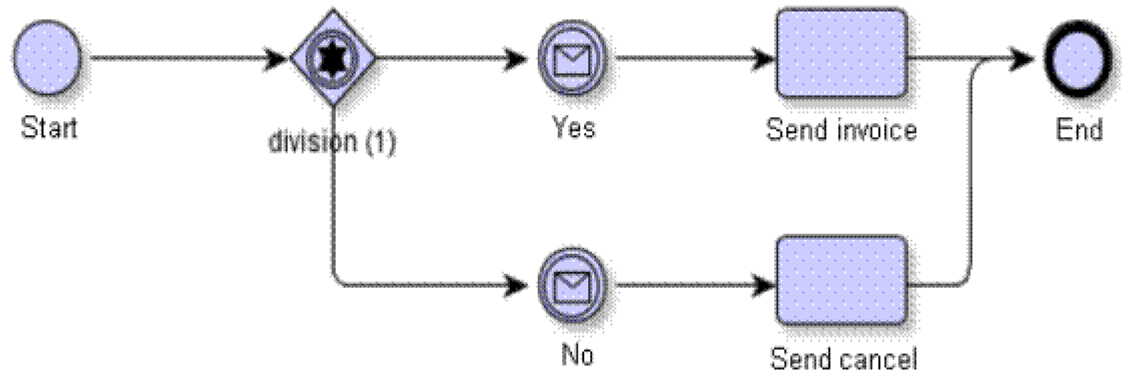
- Add one ore more specific condition(s) to an action.
- Delete the selected condition.
- Edit the selected condition.
- / Move up or down the condition in the table.

GATEWAYS

EVENT EXCLUSIVE DIVISION GATEWAY

In this gateway, the decision of taking one of the potential paths is based on **events** that follow the gateway (one different event for each path). The first event that happens determines the path to be taken.

Example: In this process, after the division gateway, there are two potential paths each one having a different "e-mail" event: in one case Mr. Smith is expecting an e-mail, in the other case Mr. Dalton is expecting an e-mail. If Mr. Smith receives an e-mail first, the flow takes the corresponding path.



The parameters about the mailbox in which the e-mails are expected must be specified in each event's properties, not in the gateway's properties.

Data exclusive division gateway

Here is a description of the properties that are available for the Data exclusive division elements:

Transitions

Task order

Reminder: this type of gateway allows only one path to be taken. The choice of the path is based on data.

The potential paths must be classified in priority order here. The system examines the conditions in that order and the flow takes the first path where the condition is fulfilled. If none of the conditions is fulfilled the flow takes the default path (**default task**).

To set the tasks priority order, move them up and down in the list by selecting them, and clicking the blue arrows.

The conditions to be fulfilled for each potential path must be formulated under **Conditions**.

Default task

Select the next stage of the process in case none of the potential paths (see **Task order**) fulfills the formulated conditions.

Conditions

Specify here the conditions each task (potential path) must fulfill to validate its execution and so go to next stage. Such conditions are based on attribute values.

Example: The attributes of this form are meant to index "bid proposal" documents. The conditions in the figure below are: The task is validated if the value of the "Author" attribute is "John SMITH" AND if the value of the "Validation" attribute is "True". That means the process continues through this potential path *if the bid proposal's author is "John SMITH" and if the bid proposal has been validated (validation "is true").*

AND/OR	IF/NOT IF	Attribute	Operator	Value
--	IF	Author	Equal to	John SMITH
AND	IF	Validation	Is True	

- To add a condition line, click , then select a boolean operator (AND/OR) at the left of the new line.
- To delete a line, click at its right.

Condition for

Select the task (path) for which you want to specify the validity conditions in the table below.

AND/OR

Select a boolean operator AND or OR to link the current condition and the previous one.

IF/NOT IF

You can select the NOT operator to indicate the value "must not be" as entered in the **Attribute**, **Operator**, and **Value** columns.

Attribute

Select the attribute where the value must be searched.

Operator

Select an operator to link the attribute and the value.

Value

Enter the searched value.

INCLUSIVE DIVISION GATEWAY

Reminder: After this type of gateway, the flow can take one or more paths. The decision to take one path or/and another is based on data. The system checks the conditions to take each potential path. The flow takes those of which the condition is fulfilled. If any of the conditions are fulfilled, then the flow takes the default path (**Default task**).

Here is a description of the properties that are available for the Inclusive division elements:

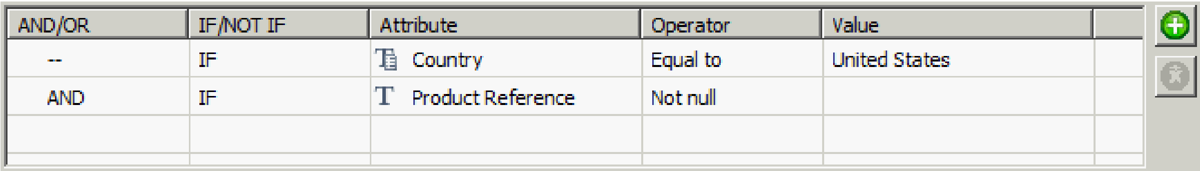
Default task

Select the next step (task) of the process in case none of the potential paths fulfills the conditions.

Conditions

Specify here the conditions each task (potential path) must fulfill to validate its execution and so go to next stage. Such conditions are based on attribute values.

Example: The attributes of this form apply to "outgoing mail". The conditions in the figure above are: The task is validated if the value of the "Country" attribute is "United States" AND if the "Product Reference" attribute is filled out. That means the process continues through this potential path only if the customer is an American company AND if the reference of the sold product is indicated. Next you must specify the conditions to be fulfilled to take each potential path.



AND/OR	IF/NOT IF	Attribute	Operator	Value
--	IF	Country	Equal to	United States
AND	IF	Product Reference	Not null	

- To add a condition line, click , then select a boolean operator (AND/OR) at the left of the new line that displays.
- To delete a line, click at its right.

Condition for

Select the task (path) for which you want to specify the validity conditions in the table below.

AND/OR

Select a boolean operator AND or OR to link the current condition and the previous one.

IF/NOT IF

You can select the NOT operator to indicate the value "must not be" as entered in the **Attribute**, **Operator**, and **Value** columns.

Attribute

Select the attribute where the value must be searched.

Operator

Select an operator to link the attribute and the value.

Value

Enter the searched value.

Events

Timer event

Inserting a timer event on a process path means a specific time must elapse so that the process can go on through the path.

Here is a description of the properties that are available for the Timer event elements:

Delay

Absolute time

Takes the system time into account.

Example: the delay is 0:05 (5 minutes) and the flow reaches the event at 4:55 PM, the flow stops, and then continues at 5:00 PM.

Active time only

Takes the time specified as “active” in the process planner, if any.

Example: The delay is 0:05 (5 minutes). It is Friday 4:59 PM. According to the planner, the active hours stop at (we are off work at) 5 PM, and starts again on Monday at 9:00 AM. The flow stops, and then starts again on Monday at 9:04 AM.

Delay

Enter the time to wait before the flow starts again through the path.

By attribute

Allows you to specify a duration according to the value of a **Date** attribute filled during the process.

> ***If there is no “Date” attribute in the process form, this option is grayed and cannot be used.***

To use this feature, check the **Attribute** checkbox, and select an attribute in the drop-down list. During the process, a user will fill in the process form and specify a date in the field corresponding to this attribute. The process will be delayed until the date specified.

If the attribute is not filled, the process will go on right away.

WAIT E-MAIL EVENT

When it is positioned on a process path, the e-mail event indicates someone must receive an e-mail to allow the process to continue through the path. So you must inform the system on which server, in which mailbox, etc., the e-mail is expected to arrive.

Here is a description of the properties that are available for the Wait e-mail event elements:

Connection

Mail server

Type the name of the mail server which should be of this type “company.svr.com” or its IP.

Type POP3/IMAP

Type the type of mail server you are using: “POP3” or ‘IMAP”.

Check mail every

Type the frequency to which the system must check if the expected e-mail has arrived in the mailbox.

The type format is: 0:05 (=hours:minutes). Example: 0:05 means the system will check the arrival of the e-mail every five minutes.

Account

Mail account

Type the address of the account where the e-mail is expected to arrive.

User name/Password

Type the user name and password of the mail account where the e-mail is expected to arrive.

WAIT ATTRIBUTE VALUES

When it is positioned on a process path, the Wait attribute values event indicates a user must enter a specific attribute value, to allow the process to continue through the path. Thus, you must inform the system the value(s) some attribute must contain.

Here is a description of the properties that are available for the Wait attribute values event elements:

Check loop delay

Enter the frequency to which the system must check if the attribute defined in the **Conditions** table has been filled with the expected attribute value. The type format is: 0:05 (=hours:minutes). Example: 0:05 means the system will check if the expected value has been entered every five minutes.

Conditions

This table allows you to add conditions based on attribute values, and that will allow the process to continue through the path in question.

To add a condition:

1. Click on ⊕ at the right of the **Conditions** table.

   The Conditions dialog is displayed.

2. Click on ⊕ to add a condition.

   A line of condition is displayed in the table.

3. Specify the condition with the attributes available in the **Attributes** field of the table. The attributes that are displayed match those in the form that has been defined as the process form, in the **Properties** tab of the process.
4. Define the value the specified attribute must contain, in the **Value** field, to allow the process to continue through the path in question.
5. Repeat steps 2 to 4 to add a new condition.
6. Click on **OK**.

   The Conditions dialog window closes. The specified condition(s) are displayed in the Conditions table.

You have added a condition.

WAIT PROCESS EVENT

The Wait process event indicates a given sub-process must end or stop to allow the main process to continue through the path. This event allows for the synchronization of both main process and sub-process: it sets the end of the sub-process as the trigger that allows the main process to start again.

Here is a description of the properties that are available for the Wait process event elements:

Process launched by

Select the Start another process task which is to start the sub-process. The Wait process event waits for the sub-process to end or stop, which triggers the main process start again through the path.

Check loop delay

Enter the sub-process (started by the task selected in **Process launched by**) end or stop check frequency. The entry format must be of this type: 0:05 (=hours:minutes). 0:05 means the system checks every five minutes.

Synchronize attributes

If the main process form and the sub-process (started by the task selected in **Process launched by**) form have attributes in common, this option copies the attribute values entered during the execution of the sub-process and copies them in the main process form. This makes such data available for next executors in the main process. Letting this checkbox clear avoids transferring these data for confidentiality reasons, for example.

Synchronize documents

Picks up the documents added during the execution of the sub-process (started by the task selected in **Process launched by**) in order to make them available for the next task executors of the main process. Letting this checkbox clear avoids transferring these documents for confidentiality reasons, for example.

Delete documents from child process

Once the sub-process documents have been added to the main process, you can choose to delete them so as not to keep duplicates.

CUSTOM EVENT

This element allows you to put the process in stand-by until a particular, custom event has occurred.

Here is a description of the properties that are available for the Wait custom event elements:

Check loop delay

Enter the frequency at which the system must check whether the custom event has occurred. The entry format is: 0:05 (=hours:minutes). 0:05 means the system performs a check every 5 minutes.

Script editor

Write a script that checks whether the event has occurred and returns TRUE when such is the case.

How to compile a process?

When you've finished a process graph and the configuration of its elements, you can then compile it in order to test its consistency and identify problems, if any:

1. To compile a process, click **Compile** at the bottom of the pane.

   When the compilation is finished, an error and warning report displays.

2. To find out an error or a warning, double-click on the concerned line.

   Now you're back in the process graph. The element where the problem has been identified is selected.

3. To go back to the compile report, click the **Compile** tab on top of the pane.

How to deploy a process?

Once a process is ready to use (graph finished and correct compile report), you can put it at the authorized users' disposal: to deploy a process, in Gargantua 7 Administration Tool, select the process and then click **Deploy** at the bottom of the right pane.

Once a process is deployed, it is added to the list of processes each authorized user can start.

The users authorized to start a process are those assigned to the role assigned to the process start event.

How to export/import a process?

It is possible to export an existing process, in order to import it into another database and/or modify it if necessary. This avoids creating it again from scratch, and so loosing time.

The above operation has 2 steps: 1. Export the process to your hard drive; 2. Import the resulting archive into the appropriate Gargantua database. The archive contains the exact copy of all the elements that make up the process: graph, properties, attributes, forms, roles involved in the process' tasks or events.

Here is how to export and re-import a process definition:

1. In Gargantua Administration Tool, select the process you want to export.
2. Click the **Export** button in the lower part of the right pane.
3. In the dialog that displays, click **Select all**, then **OK**..

   The **Save as** window appears.

4. Browse the folders on your hard drive and save the .sxa archive corresponding to the process in a safe place.
5. In the Administration Tool, select the GARGANTUA database you want to import the process into, then click the **Import** button in the lower part of the right pane.

   The **Open** window appears.

6. Browse the folders on your hard drive and select the .sxa archive corresponding to the process you want to import.

   Click **Open**.

7. In the dialog that appears, click **Select all**, then **OK**.
8. A message confirms the import has been successful: click **OK**.

   A new entry now appears in the process list for the target database in the left pane of the Administration Tool.

DEFINING THE PLANNER FOR A PROCESS

To define the planner that applies to all the instances of a given process, proceed as follows:

1. In the left pane of the Administration Tool, click the name of the process of your choice.

   The corresponding management screen displays in the right pane.

2. In the process management screen, click the **Planner** tab.

   By default, the **None** option is selected: no planner is defined and all the elapsed time is taken into account for the calculation of the process' deadlines.

3. If you want to associate the default planner for the GARGANTUA server to this process, select the **Server default** option.

   The contents of the default planner display under the **Timetable** and **Exceptions** tabs, **in read-only mode**.

4. On the other hand, if you want to define a specific planner for this process, select the **Custom** option: you will then be able to define the contents of this planner under the **Timetable** and **Exceptions** tabs.
5. When you are done, click the **Apply** button in the lower left hand corner of the right pane.

   The new process planner now appears under the **Planners** branch of the Administration Tool.

6. Last, (re)deploy the process so that the planner is taken into account.