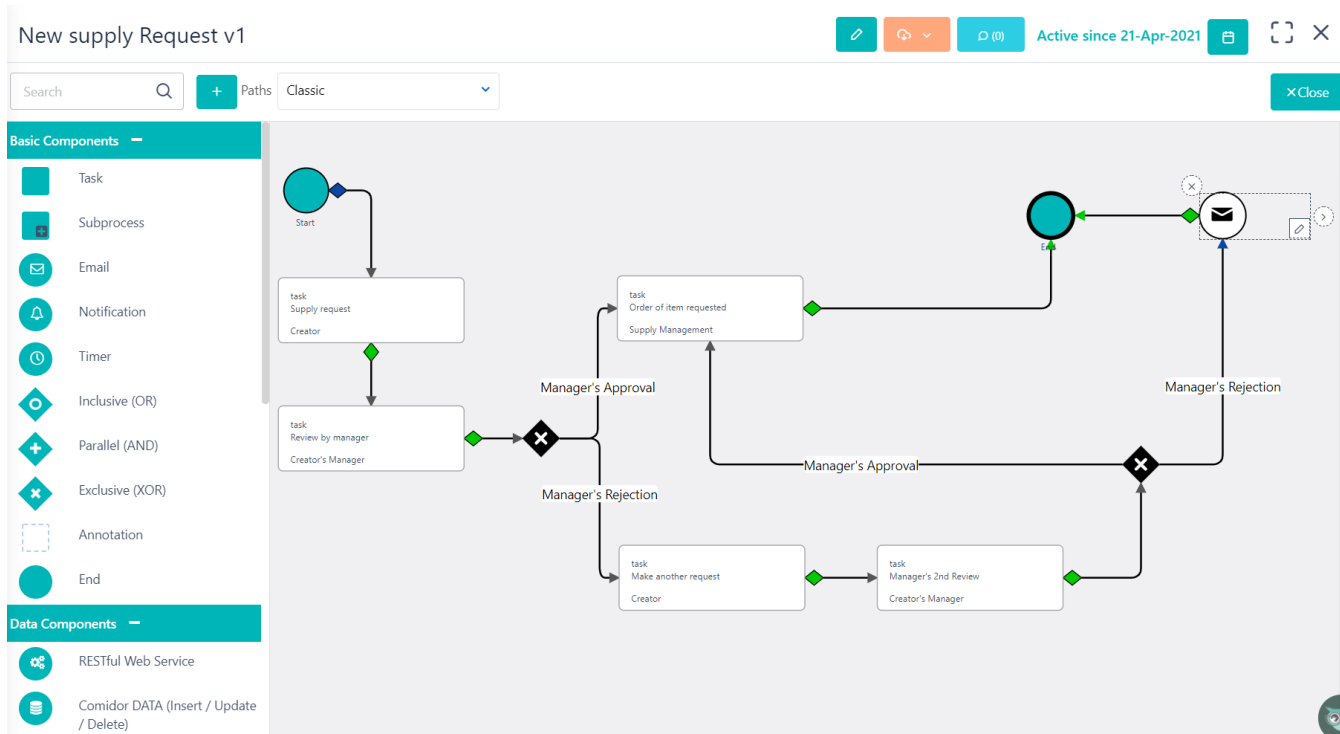# PARTNERS TRAINING SESSION 3

comidor

Workflow Designer

With Comidor BPMN 2.0 designer, you can map and optimize any process that takes place in your company.

Workflows fully exploit the organizational structure to provide unprecedented process design and action monitoring. Through Workflows Designer, the user can navigate and modify existing processes or create a new one using BPMN 2.0 with drag-and-drop functionality

Create a workflow

Workflow example: New Supply Request

- Separate the pool in different lanes according to which group will perform each task

- Create the 5 tasks with drag and drop functionality

- Decide which of the gateways is appropriate according to the case

- Connect the tasks with the gateways to complete your workflow
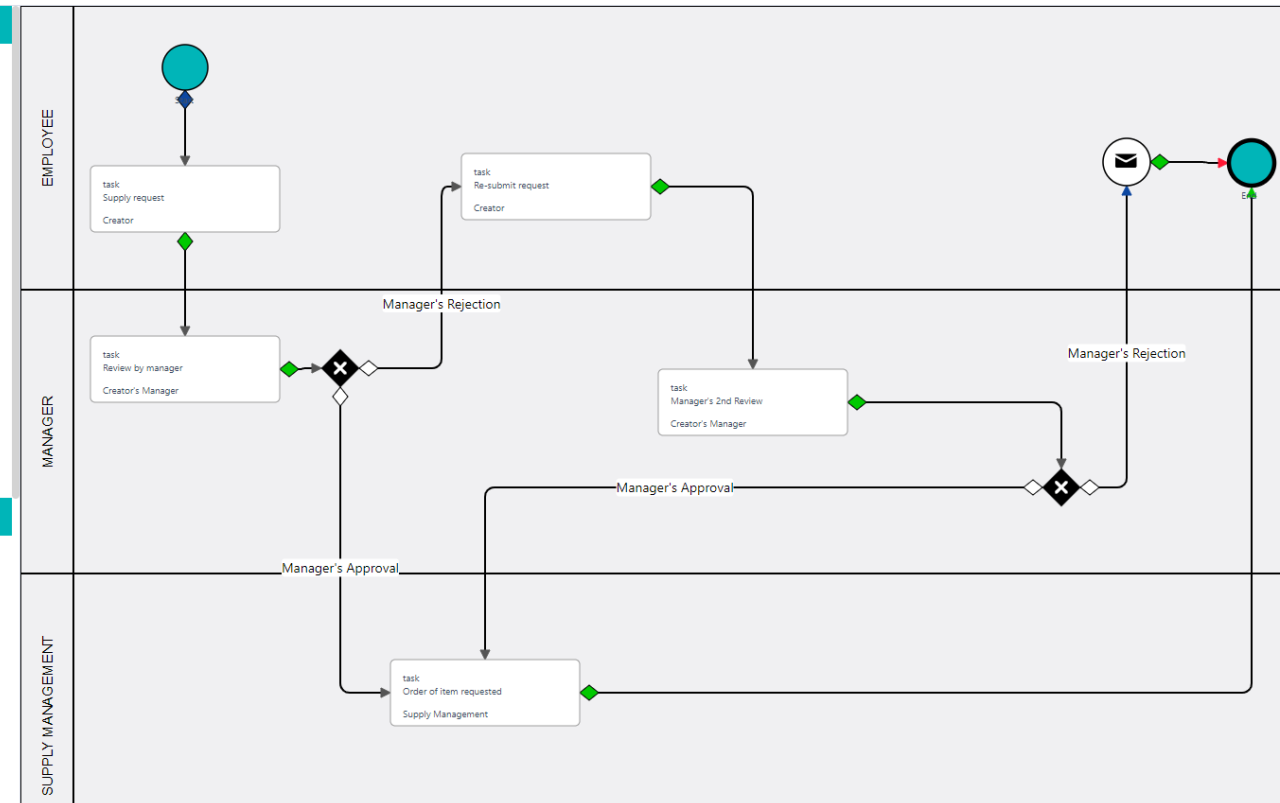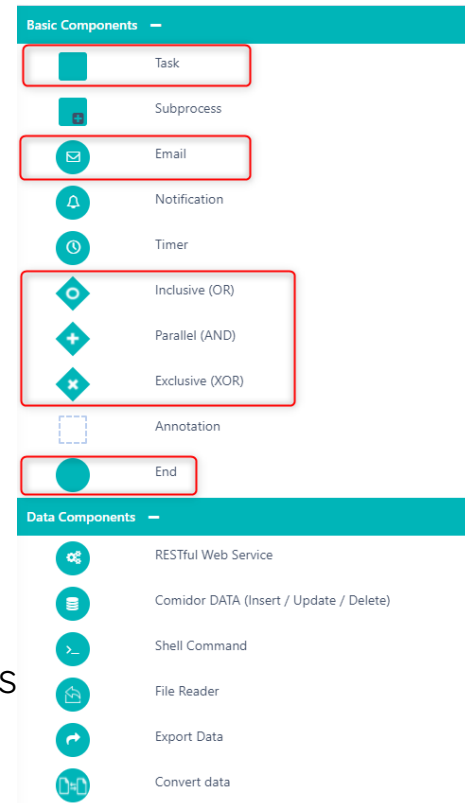
App Builder

Comidor platform offers the ability to build your own apps through **App Builder**, without using coding.

Making simple or more complicated Apps is easier than ever, even for non-developer users.

Comidor guides you with simple steps, in order to publish your idea.

Types of Applications

1. Table applications
   1. Process enabled
   2. Non-process enabled apps (Data driven)
2. Report applications
3. Kanban applications

Table applications

There are two types of table applications:

- Process enabled

Choose this type when you want to monitor process enabled records, with scheduling, state, workflow steps, completion, etc.

- Non-process enabled

Select this type of table application, when you want to create a table of data driven records. No workflow can be related to this type.

Users can apply the following actions in table applications:

- Access the table(access rights are specified by the designer)

- Print or export the table results

- Apply filters, categorise and search within each table

- Enter, edit or delete each record

- View records in table or graph views
- In graph view, pie, bar or stack charts can be easily created with real-time data and desired filtering.

Customer request management

Priority	Ticket category	State	Ref no	Name	Subject	Description	Company name	Confirm resolution	Email	Date Created
Top	Complaint	Running	34	Mary Blinds	Connection Complaint	I have a serious issue with my conne...			testingcomidor@gmail.com	Feb 25, 2021 12:50:48 PM
Normal	Corporate	Completed	33	Jonas Brower	New supplies for machines		Jonas Inc		jon@yahho.gr	Feb 24, 2021 8:29:52 AM
Normal	Complaint	Cancelled	32	Mary Blinds	Connection Complaint				testingcomidor@gmail.com	Feb 22, 2021 10:17:37 AM
Top	Corporate	Completed	31	adgdaf	no fikters	problem with filters			ya@gmail.com	Jan 20, 2021 11:58:18 AM
Top	Complaint	Completed	30	John Smith	problem with email lists	I have an issue withe email lists. It se...	NEWPORT	Yes	johnnew@yahoo.com	Jan 20, 2021 10:12:53 AM
Normal	Corporate	Completed	29	Anna Maria Johnson	New material lists	List of materials	Attica	Yes	annatt@gmail.com	Jan 20, 2021 10:04:16 AM
Top	Corporate	Completed	28	Henri Kuqali	I have an issue with our corporate c...	for the last 1 week we have issues wi...	Comidor	Yes	testingcomidor@gmail.com	Jan 18, 2021 3:55:29 PM

Show 20 entries   Previous 1 Next

Create an App

comidor

Step 1. Basic Info

Application example: Supplies

1. Select the **Application Type** (Table/ Report)

2. Start typing a name for the **Entity** you are creating in the database.

3. Give the **Application Name** and **Description**

4. Define whether the App is Process enabled or not. Process enabled apps can be linked with a [Workflow].

5. **Access Rights:** determine which users will be able to see the application in the User Apps menu.

6. You can lock your app, so only your user can edit the app.

Basic Info	Data Model	Table	Forms	Widgets	Tabs	Workflow	Event Scripts	Overview	Publish
1	2	3	4	5	6	7	8	9	10

Save Cancel

Application Type — Table Application

Entity ★ — SUPPLIES — ☐ Is existing entity

Application Name ★ — Supplies

Description

Is process enabled — ☑

Access Rights — Everyone ✕

Locked — ☐

Has customizations — ☐

Has application parameters — ☐

Create an App

Step 2. Data Model

In the Data Model, you can add all fields that you wish to be used in the App. You can either click on the "+" to create your own custom fields from scratch or import an Excel/CSV file.

- **User fields types:** Text, Memo (Paragraph), Number, Binary File, Drop-down list (Key-Value or Comidor Database lists),Excel, Currency, Checkbox, Date, more.

Note that, if you have selected this app to be process enabled, you can also use in the forms (step 4) all process-related fields. If you left "is Process enabled" unchecked, you can only use the fields displayed in the Data model.

Do not forget to reload the DB after you created all the fields, so that the other users can see them.

Create an App

Step 3. Table

- In step 3, you can determine which columns you wish your App to have in the main table. By default, all fields that were added to the Data Model will be displayed in this table.

- You can add more Columns, by clicking on the "+" icon and selecting the desired field.
  - Note that, if you have selected this app to be process enabled, you can also add process related fields as columns(e.g., date created, creator, stage, etc.)

- Re-arrange the position of each column with drag-n-drop.

- Add label to the column name, set Prefix or Suffix to be displayed before or after the value of each entry, select the preferred alignment and other properties.

Supplies

Summary

	Basic Info	Data Model	Table	Forms	Widgets	Tabs	Workflow	Event Scripts	Overview	Publish
	✓	✓	3	4	5	6	7	8	9	10

Table Columns

Search...

	Position	Label	Column	
☐	0		SUPPLIES.PROCESS_ID	
☐	3		JP_PROCESSES.STATE	
☐	4		JP_PROCESSES.STAGE	
☐	5		SUPPLIES.USR_MANAGER_S_REVIEW	
☐	6		SUPPLIES.USR_REVIEW_COMMENTS	
☐	7		SUPPLIES.USR_RE_EVALUATION_OF_REQUEST	
☐	8		SUPPLIES.USR_NEW_ORDER_REQUEST	
☐	9		JP_PROCESSES.CREATE_DATETIME	

Show 20 entries   Previous 1 Next

comidor
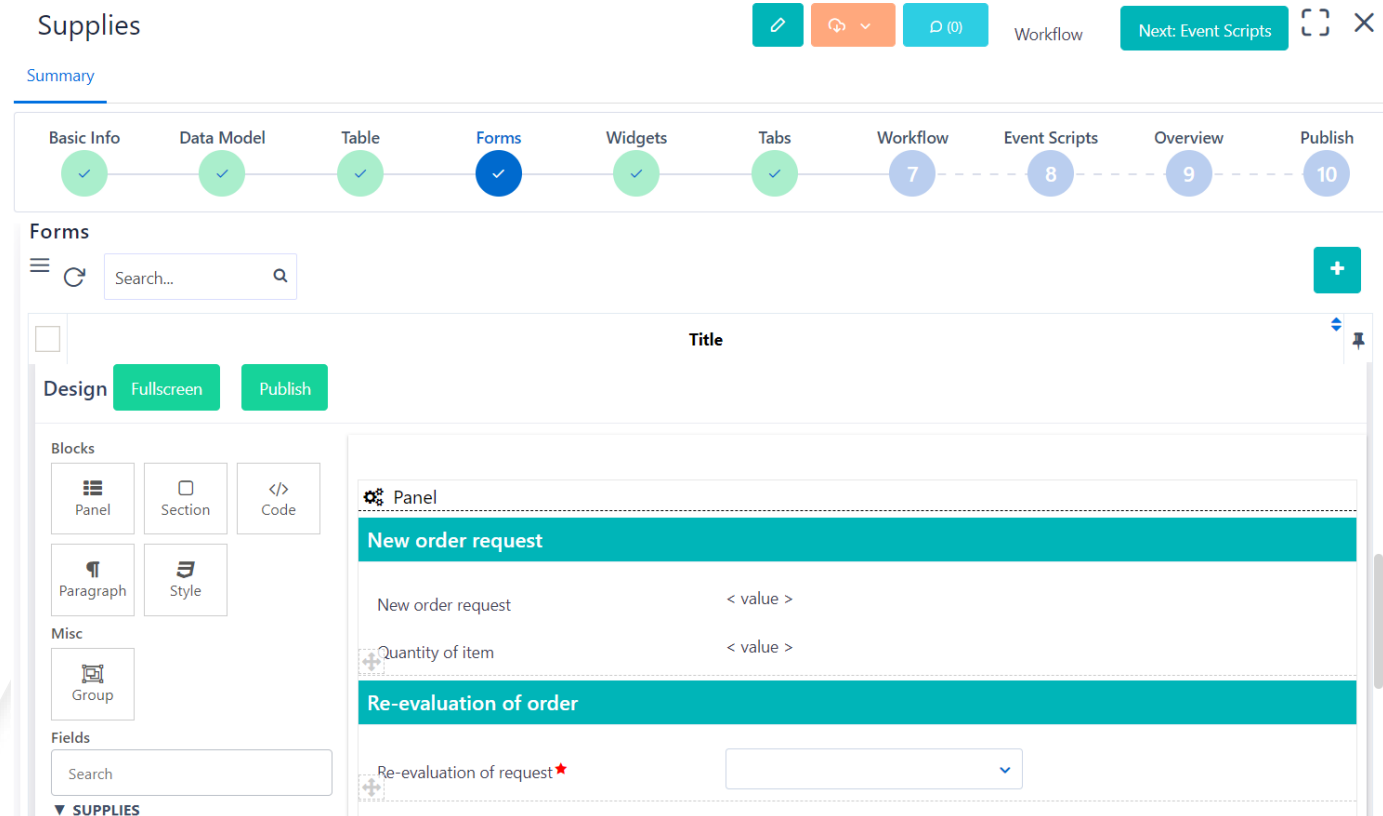
Create an App

Step 4. Forms

- Forms can be used as Main forms in a Process (Workflow-driven or not) or as forms inside the Activities(tasks).
  - Design your form easily, with drag-n-drop of fields, and group them with Sections. Don't forget to Publish your form after finishing your design.
  - Multiple Columns, Paragraphs and Style may be added inside a Form
  - Forms may have its own view and change rights
  - Fields added inside forms may be "read only" or "read/write" per form
  - Fields added inside forms may be mandatory or not
  - Forms may be supported with scripts

Create an App

- **Step 5. Widgets**

- Comidor Widgets are the ideal choice for data visualization. Get the freshest data on a visualization you define.

- Create your own personalized dashboard in seconds.

- Combine multiple views of data to get richer insight.
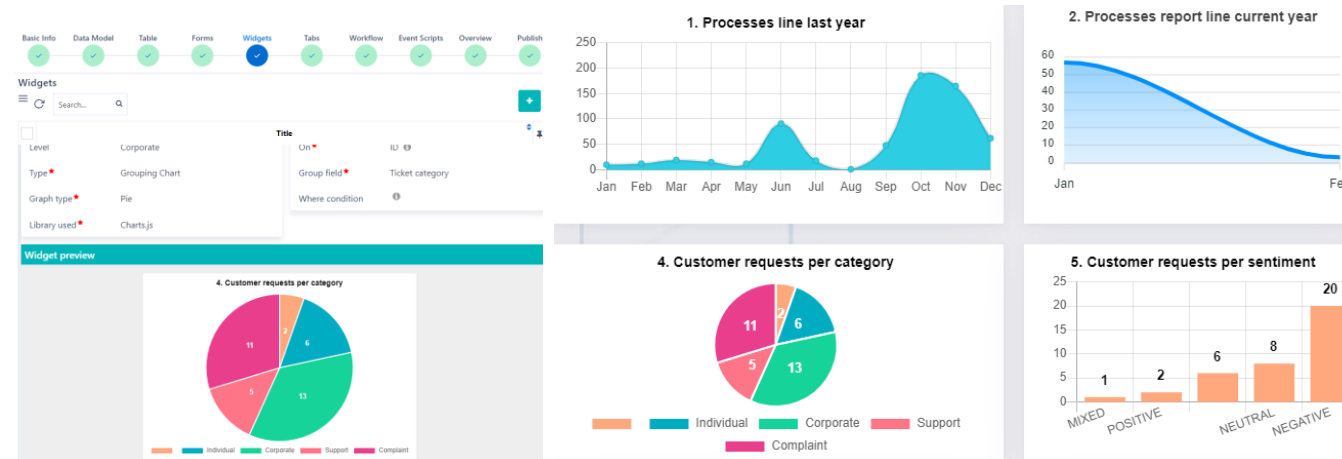
- **Step 6. Tabs**

- Use tabs to have complete control over the accessibility of your application.

- The tabs can appear inside records (as a tab at the left part of the record) or at the summary table of the application.

- A tab can be a table from any Comidor entity, HTML, or a widget.
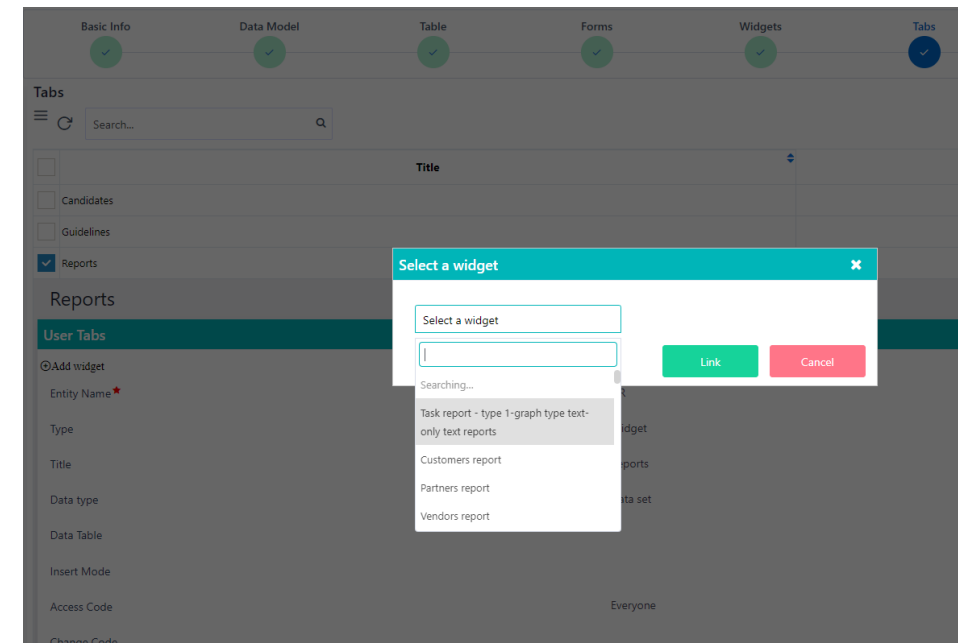
Create an App

- ## Step 7. Workflow

  - You can link a workflow to the App at this step. The workflow will be triggered in each entry a user creates in this app. Workflow relates tasks, run diagram, and workflow audit will be visible there too, for the users to get real-time information about the workflow stage.

  - Step 7, is only available if you had checked is Process Enabled, in step 1.

- ## Step 8. Event Scripts

  - In this step, you can write scripts for a certain Data Type to be executed before/after/on a specific event.

  - Choose the **Data Type** (apprec, task, process, dataset) and define where you want the script to be applied

  - An Event Type can be inserted, updated, deleted, etc.

  - In the **Procedure Body** add your code.

    - This is for advanced users to write their procedures.

Create an App

Step 9. Overview

- In this step, you can make the configuration of the Application.

- Decide if you wish to include from the **Basic options** ([Notes](), [Tags, and Links]()), create, edit and/ or delete an entry, include print/export options)

- **Customise your data** by
  - setting a Prefix and Suffix, an Incremental Number Field
  - Defining a **Primary Field**
  - Defining to whom each entry is assigned to, send notifications, Admin 1,2, and Supervisor.

- Fully customise the app layout, by selecting font sizes and colors in **CSS Design** options.

Step 10. Publish

- Your app is ready to be used!

Run your application

All published apps can be access by the main menu> Custom Apps.

- By clicking on the "+" icon you can create a new entry of this app. (In order to see the + icon, you should have checked first the respective option in the Overview step of App builder) A new tab will open with the form that was created in the App Builder. Fill in the fields and click on Save to add this entry.

- If the App is process enabled and linked with a workflow it will have State (Opened, Scheduled, Running, etc.) and some more Tabs in the left-side menu, such as Workflow tasks, attachments, and workflow audit based on the configuration of the App in the App Builder.

- If you have selected the primary form of the app to be also visible in the quick add menu, you can easily initiate this App, from quick add and by clicking on the name of this form.

Other actions:

Users can import/ export/ edit/ delete applications in App builder.

Workflow Repository

In unit Workflows you can access the Workflow repository.

General information about each workflow is provided via tabs Process Mapping, Business Process Document and Business Process Guidelines.

1. **Process Mapping:** Add process mapping in HTML, including enriched text and pictures to provide general instructions and information.

2. **Business Process document**: Export the full workflow design and architecture including all components, resources and stakeholders involved. The document includes Business process diagram, Process elements in detail, Personnel allocation, Workflow Controls Contents, Workflow Policies Contents and SPP Contents.

3. **Business Process Guidelines**: Comidor automatically generates a documentation guide to inform users about the practices in each workflow stage.

Workflow Change management

- Different workflow versions can be created in order to assure smooth transition from one version to the other and change tracking. Designers can create, schedule version activation on specific dates, deactivate, modify and delete existing versions.

- Comidor platform gives you the ability to track and monitor the changes that are incorporated into any workflow. You can track changes applied in specific tasks of the workflow within the **Audit Trail** Log as well as compare different versions of the same workflow in the **Compare Versions** tab. A document is automatically generated and includes the two workflow designs as well as a description of all applied changes. New elements are given in green, deleted elements in red and changes in existing elements in orange.

Workflow Reports

Comidor offers different ways to monitor the Workflow designs and the user responsibilities within a business.

- The RACI Report depicts the different user responsibilities and roles regarding the workflow tasks of a business process, by demonstrating which user is Responsible, Accountable, Consulted, or Informed.

- The User Activities Report is based on users and shows the workflows in which a user participates, the activities, the responsibilities per workflow stage, as well as other important information regarding the workflow.

- Define the respective filters and fetch your results. Both Reports are printable and exportable.

Find out more.

Training Objectives

- Understand the application types

- Design a workflow and link it with an application with an example

- Create a business application following 10 simple steps

- Learn how to execute and monitor applications

- Find out the workflow actions and capabilities

Thank you!