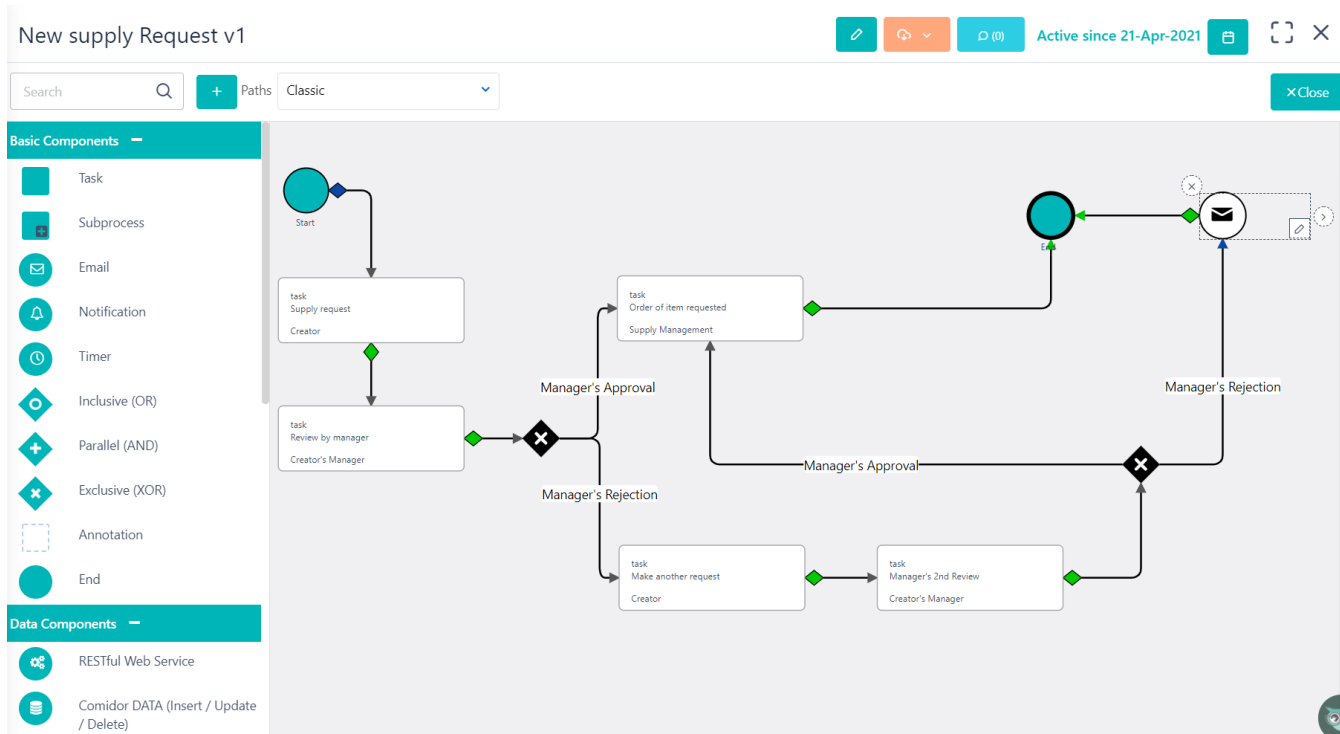


# PARTNERS TRAINING SESSION 3







# Workflow Designer

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

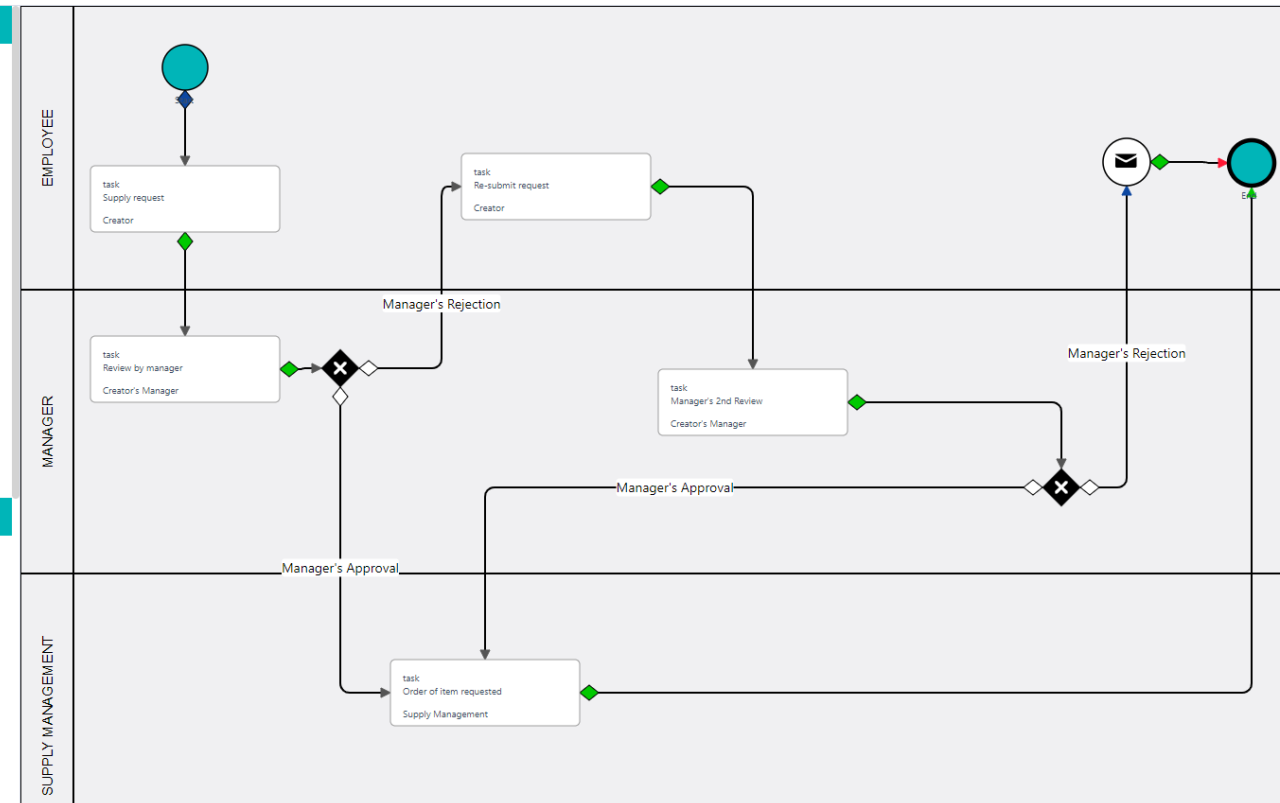
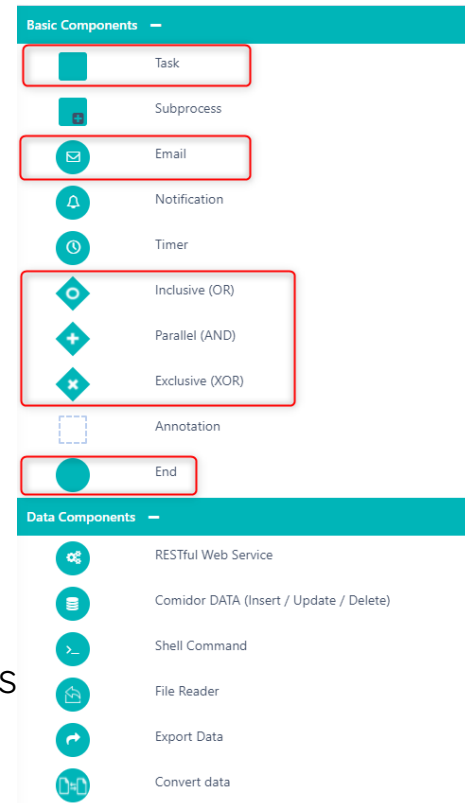
Workflows fully exploit the organizational structure to provide unprecedented process design and action monitoring. Through Workflows Designer, the user can navigate and modify existing processes or create a new one using BPMN 2.0 with drag-and-drop functionality



# 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





SaveCancel

Basic Info

Data Model

Table

Forms

Widgets

Tabs

Workflow

Event Scripts

Overview

Publish

1

2

3

4

5

6

7

8

9

10

Application Type

Table Application

Entity

SUPPLIES

Is existing entity

Application Name

Supplies

Description

Is process enabled

Access Rights

Locked

Has customizations

Has application parameters



# 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



Customer request management

Search...

<input type="checkbox"/>	Priority	Ticket category	State	Ref no	Name	Subject	Description	Company name	Confirm resolution	Email	Date Created	<input type="checkbox"/>
<input type="checkbox"/>	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	
<input type="checkbox"/>	Normal	Corporate	Completed	33	Jonas Brower	New supplies for machines		Jonas Inc		jon@yahoo.gr	Feb 24, 2021 8:29:52 AM	
<input type="checkbox"/>	Normal	Complaint	Cancelled	32	Mary Blinds	Connection Complaint				testingcomidor@gmail.com	Feb 22, 2021 10:17:37 AM	
<input type="checkbox"/>	Top	Corporate	Completed	31	adgdaf	no fiktors	problem with filters			ya@gmail.com	Jan 20, 2021 11:58:18 AM	
<input type="checkbox"/>	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	
<input type="checkbox"/>	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	
<input type="checkbox"/>	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

- 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.



# Create an App



## Step 1. Basic Info

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.

## Application example: Supplies

The screenshot shows the 'Basic Info' step of the Comidor application creation process. At the top right are 'Save' and 'Cancel' buttons. Below is a progress bar with 10 steps: 1. Basic Info (active), 2. Data Model, 3. Table, 4. Forms, 5. Widgets, 6. Tabs, 7. Workflow, 8. Event Scripts, 9. Overview, and 10. Publish. The form fields include: 'Application Type' set to 'Table Application'; 'Entity' set to 'SUPPLIES' with a checkbox for 'Is existing entity'; 'Application Name' set to 'Supplies'; an empty 'Description' text area; 'Is process enabled' checked; 'Access Rights' set to 'Everyone'; and checkboxes for 'Locked', 'Has customizations', and 'Has application parameters' which are all unchecked.



# 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.



Supplies

Summary

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

Data Model

Search...

+ Import Excel/CSV Import Data

	Label	Type	Size	Column name	
<input type="checkbox"/>	Quantity	Number	9	USR_QUANTITY	
<input checked="" type="checkbox"/>	Order request	Text	255	USR_ORDER_REQUEST	

SUPPLIES.USR\_ORDER\_REQUEST

Basic Info

Entity ★ SUPPLIES

Label ★ Order request ☒ Auto-generate name

Column name ★ USR\_ORDER\_REQUEST Field as viewed in database

Type ★ Text



# 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

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

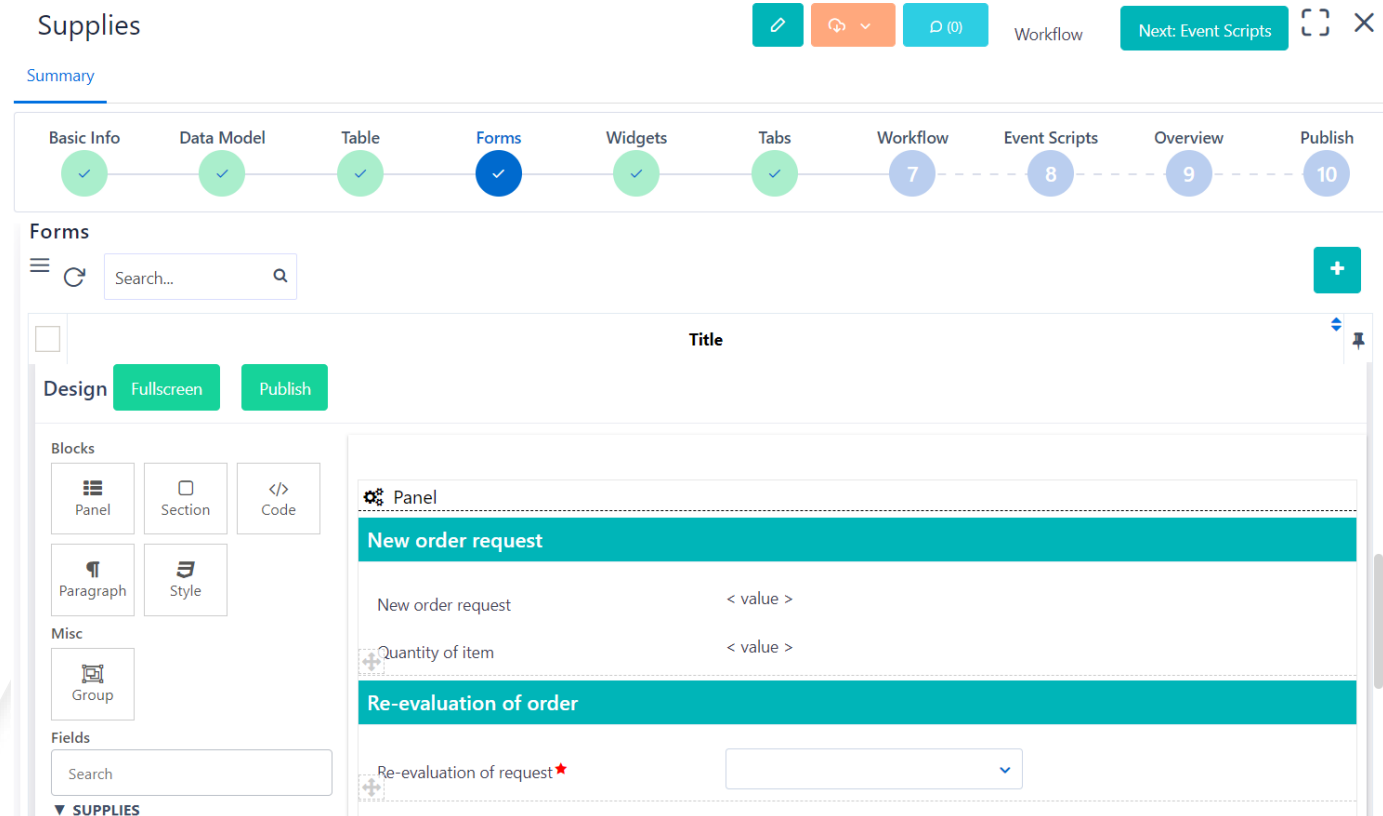




# Create an App

## 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



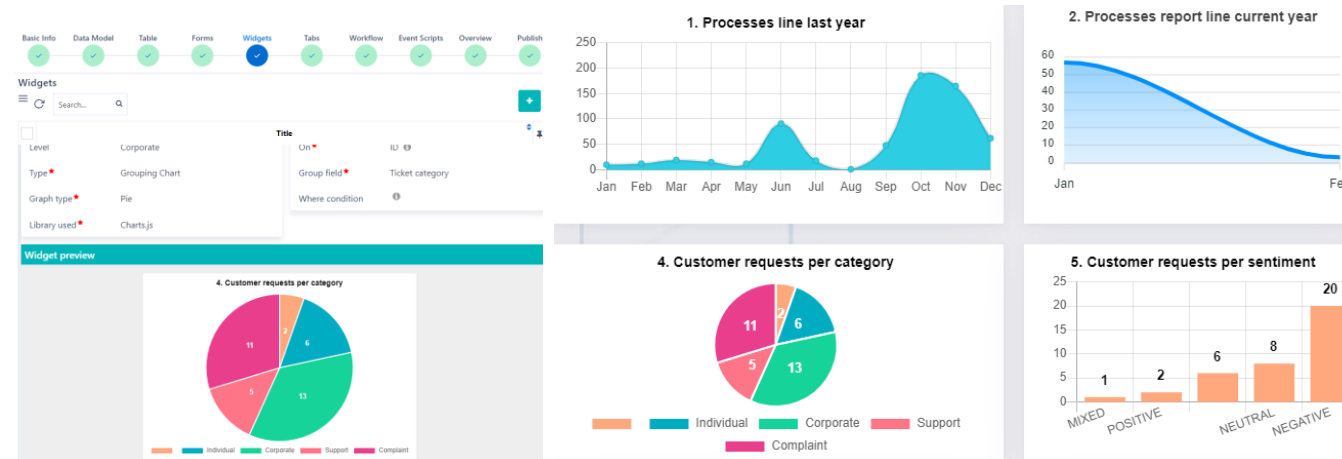
The screenshot shows the Comidor Forms editor interface for a form titled "Supplies". At the top, there are navigation buttons: a link icon, a refresh icon, a "D (0)" button, a "Workflow" button, and a "Next: Event Scripts" button. Below these is a progress bar with steps: Basic Info, Data Model, Table, Forms (selected), Widgets, Tabs, Workflow, Event Scripts, Overview, and Publish. The "Forms" step is highlighted with a blue circle and a checkmark. Below the progress bar, there is a "Forms" section with a search bar and a "+" button. The main editor area is titled "Title" and has "Design", "Fullscreen", and "Publish" buttons. On the left, there is a "Blocks" panel with icons for Panel, Section, Code, Paragraph, Style, and Group. The main editor area shows a form structure with two sections: "New order request" and "Re-evaluation of order". The "New order request" section contains two fields: "New order request" and "Quantity of item", both with "< value >" placeholders. The "Re-evaluation of order" section contains a field "Re-evaluation of request" with a red star icon and a dropdown menu.



# Create an App

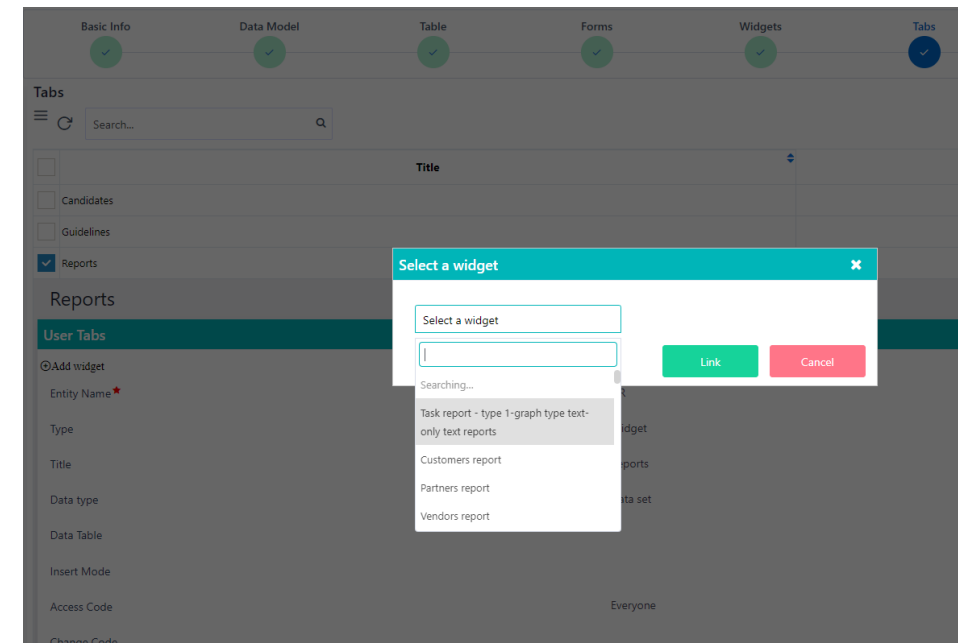
## Step 5. Widgets

- 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!

Basic Info Data Model Table Forms Widgets Tabs Workflow Event Scripts Overview 9 Publish 10

### Configuration

Basic Options	Data Customization
Include notes <input checked="" type="checkbox"/>	Prefix <input type="text"/>
Include tags <input checked="" type="checkbox"/>	Suffix <input type="text"/>
Include links <input checked="" type="checkbox"/>	Incremental No Field <input type="text"/> Quantity of item x ▾ Starting From 0
Insert Mode <input checked="" type="checkbox"/>	Level 1 Categorization <input type="text"/> Stage x ▾
Update Mode <input checked="" type="checkbox"/>	Level 2 Categorization <input type="text"/> ▾
Delete Mode <input checked="" type="checkbox"/>	Level 3 Categorization <input type="text"/> ▾
Allow user layout change <input type="checkbox"/>	Primary Field (Record Identity: Appears in lists etc) ★ <input type="text"/> Item requested x ▾
Allow print <input checked="" type="checkbox"/>	Ordering <input type="text"/> ▾ Ascen... x ▾
Allow export <input checked="" type="checkbox"/>	Assigned To <input type="text"/> Creator x
Track File Views <input type="checkbox"/>	Send Notification To <input type="text"/>
	Administrator <input type="text"/> ▾

Basic Info Data Model Table Forms Widgets Tabs Workflow Event Scripts Overview Publish

The application is now published! Click on the button below to publish changes

Publish Changes



# 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.

The diagram illustrates the process of creating a new entry. On the left, a 'Quick Add' dropdown menu is shown with options: 'Sales Order request', 'Purchase Order request', and 'New order request' (which is highlighted with a red box and a star icon). A teal arrow points from this menu to a 'New order request' form on the right. The form has two input fields: 'New order request' and 'Quantity of item', both marked with red stars. At the bottom right of the form are 'Save' and 'Cancel' buttons. A second teal arrow points from the 'Save' button down towards the main application interface.

The screenshot shows the Comidor application interface. On the left is a 'Supplies' sidebar with a search bar and a list of items: 'wireless mouse / 23-Apr-2021' (checked), 'keyboard / 23-Apr-2021', 'Laptop / 23-Apr-2021', and '123 / 23-Apr-2021'. The main area displays the details for 'wireless mouse / 23-Apr-2021'. It includes a 'RELATIONS' section with counts for Subprocesses (0), Workflow Tasks (1), Related Tasks (0), Attachments (0), and Workflow audit (0). Below this is an 'OWNERSHIP' section with details on creation and updates. The top right shows the app's state as 'Running'. The main content area is divided into two tabs: 'Basic Info' and 'Purchase order details'. The 'Basic Info' tab shows fields for Creator, Date Created (01-Jan-1970 05:36:50), State (Running), Stage (Supply request), and Finished at. The 'Purchase order details' tab shows fields for Purpose of purchase, Quantity of item (3), New order request (wireless mouse), Manager's review, Review comments, and Re-evaluation of request.

## 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.

Views

Filters

Groups

Recent

All

-

00 Finance

01 Accounting

02 Products & Services

04 Human Resources

05 Operations

06 IT

07 Sales

09 Support

11 Audit

12 Procurement

Workflow Designs

Search

Advanced search

Title	User group	Minimum priority	Version
Document Approval Workflow	Risk Management	High	2
OEMS Asset Grading	Operational Excellence	Normal	1
Reservation Sync		Normal	1
Sales Order		Normal	1
Travel Request	Administration Team	Normal	1

1. Process Mapping

In this process, any employee can upload a document for approval.

Groups and Roles involved

Document Creator

Creator's Team Leader

Creator's Parent Group Manager

Process Steps

1. Business Process Diagram

2. Process Elements

Process Elements

Start (START)

Condition

Next Element

Check Employee's Absences (TASK)

Assigned to: HR

Description:

Process completion: 10.00%

Maximum days: 0

Condition

Next Element

Inform Accounting (TASK)

Assigned to: HR

Description:

Process completion: 20.00%

Maximum days: 1

Condition

Next Element

GATEWAY (Parallel (AND))

Condition

Next Element

3. Personnel Allocation

Assignees

Tasks

Prepare employee's folder

Assigned to: HR

Description:

Process completion: 40.00%

Assignees

Tasks

(1) Check hardware, Delete Lync user, Delete e-mail, Back up files, Delete Domain account, Check Access Point, Update Access plan

(2) Check Employee's Absences, Inform Accounting, Sign Notice of retirement / dismissal, Prepare employee's Folder, Payroll clearance, Exclude group insurance, Change Employee's Status

3. HR: On Boarding Work Practices

HR: On Boarding

Wait required Documents

START POINT	ACTIVITY DESCRIPTION	END POINT
Email to new employee	Collect required Documents	All documents collected

ACTIVITIES

Workflow diagram showing steps: Email to new employee, Wait required Documents, and subsequent steps.

WORK PRACTICES

The candidate should bring all the following documents:

1. ID

2. Completed Data form

3. Degrees

4. IBAN for payroll

5. Updated CV



# 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.



RELATIONS					
Business Process Document					
Business Process Guidelines					
Risks					
Controls					
Policies					
SPP					
KPIs					
All Documents					
Analytics					
Design					
Versions					
User Fields					
Field Rules					
User Forms					
Update Log					

Summary					
Process Mapping					
	User	Object Name	Old Value	Value	Date
<input type="checkbox"/>	Richard Newton	Recipient fields	[[{"id":"JP_PROCESSES.USR_CU...	[[{"id":"LOANS.USR_CONTACT_...	Dec 13, 2020 5:05:55 PM
<input type="checkbox"/>	Richard Newton	Maximum hours	2.00	0.00	Nov 2, 2020 8:17:17 AM
<input type="checkbox"/>	Richard Newton	Reply Link	#HEAD#?actorCode=#CLIENT...	#HEAD#?actorCode=#CLIENT...	Oct 30, 2020 2:32:25 PM
<input type="checkbox"/>	Richard Newton	Reply Link	#HEAD#?actorCode=#CLIENT...	#HEAD#?actorCode=#CLIENT...	Oct 30, 2020 2:32:15 PM
<input type="checkbox"/>	Richard Newton	Assigned to	Richard Newton	Richard Newton	Oct 30, 2020 2:26:13 PM
<input checked="" type="checkbox"/>	Richard Newton	Reply Link	#HEAD#?actorCode=#CLIENT...	#HEAD#?actorCode=#CLIENT...	Oct 30, 2020 2:26:13 PM
<input type="checkbox"/>	Richard Newton	Email body	Click here	<p>Dear Customer,  <b...</p>	Oct 30, 2020 1:49:38 PM
<input type="checkbox"/>	Richard Newton	Email body	Kind Regards, Finance Team' >Dear Custome...		
<input type="checkbox"/>	Richard Newton	Email body	Click here	<p>Dear Customer,  <b...</p>	Oct 30, 2020 1:49:27 PM
<input type="checkbox"/>	Richard Newton	Email body	Kind Regards, Finance Team' >Dear Custome...		

## Deleted Elements

Title	Type
Parent Group - Team Leader	LANE

## New Elements

Title	Type
Document Approval by Parent Group Team Leader	Notification
Document Rejection by Parent Group Team Leader	Email
Creator's Parent Group	LANE

## Process Elements

### 1. Start (START)

Field	New Value	Old Value
Until Date		





RACI Report

Dates:  -  Workflow: Document Approval W... x Status:  Version:

Process	Admin Poweruser	Ayda Stradbroke	Charlie Marr	Contract Manager	Ellie Frewer	Harrison Jones	Isaac Skinner	Isabella Hardey
Employees Edit & Review								
Team Leader Approval								
Par. Team Leader Approval								

■ Responsible  
■ Accountable  
■ Consulted  
■ Informed

# 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.

User Activities Report

User:  Workflow:  Responsible Person:  Accountable Person:  Consulted Person:

Workflow	Activity	Activity Code	Parent Stage	Assigned To	Role	Parent Completion Percent (%)	Responsible	Accountable
HR: Roles & Activities Assignment to new Employee								
	Request Roles and Activities Setup	WS7	REQUEST FOR ROLES SETUP	HR		0.00		
	Load the Roles and Activities selected to this Personnel	WS9	ROLES LOADING	IT	System Administrator	0.00		
E-mail Campaign Generation								
	Gif/Design Creation	WS4		Marketing and Sales	Digital Media Specialist	0.00		
	Content/Pictures research	WS5		Marketing and Sales	Digital Media Specialist	0.00		
	Finalization and Test sending	WS7		Marketing and Sales	Marketing Strategist	0.00		
	Campaign creation and scheduling in Mailchimp	WS9		Marketing and Sales	Marketing Executive	0.00		
HR: Dismissal / Retirement								
HR: On Boarding								
IT : New Employee								

[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!**