Workflow Form General Controller and Workflow Type Control

📖 Overview

When you create a new Workflow Management Kind and add one or more Categories, in GNA, the Business Model and Entities are created automatically in the Business Entity Designer (BED).

The next step is to create a new Workflow Management user form manually in the OpenForms Designer (OFD). The following controller and custom control are required on all Workflow Management user forms:

- Workflow Form General Controller
- Workflow Type Custom Control

They perform essential validations and actions in the Workflow Management module. These are listed in the following section, Validations Performed by the Controller.

This document describes the following:

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- Scenario Creating a New Workflow on page 3

Validations Performed by the Controller

As explained in subsequent sections, the Workflow Controller:

- Ensures that the required tables are included in the entity:
    - WM_MASTER
    - WM_LK_MASTER
    - The table linked to the Category
- Ensures one of the following:
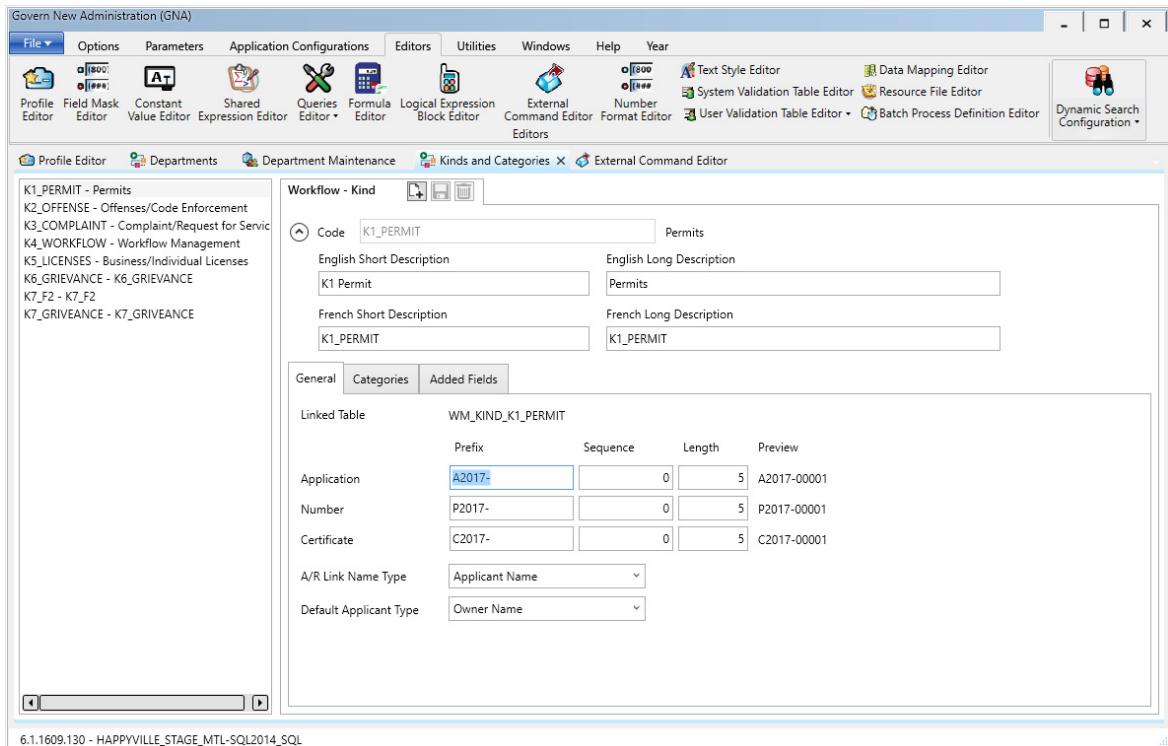
- If the **Allow Additional Type Option** on the Workflow Kinds and Categories form is set to **True**, the table linked to the Kind is not included in the entity.
- If the **Allow Additional Type Option** is set to **False**, the table linked to the Kind is included in the entity.

Creating a New Workflow Kind and Category

Perform the following steps in order to create a new Workflow Kind:

1. Launch GNA.

2. Select **Applications Configurations** > **Workflow Management** > **Kinds and Categories**.

3. Click **New**.

4. Complete the required parameters.

5. Click **Save**.

Creating a New Category

1. Launch GNA.

2. Select **Applications Configurations** > **Workflow Management** > **Kinds and Categories**.

3. Select the required **Kind** on the left.

4. Select the **Category** tab.

The Code and Short and Long Descriptions for the Workflow Kind are displayed at the top of the form.

5. Select the **New Field** icon.

6. Enter a **Code** and **Short** and **Long Descriptions** for the Category.

7. Select a key type from the **Entity Key Type** drop-down list.

8. Click **Save**.

Viewing the Automatically Generated Business Model and Entities

The business model and entities are created automatically in the Business Entity Designer (BED).

To view the business model and entities:

1. Launch the Business Entity Designer (BED).

2. Select the **Business Models** explorer.

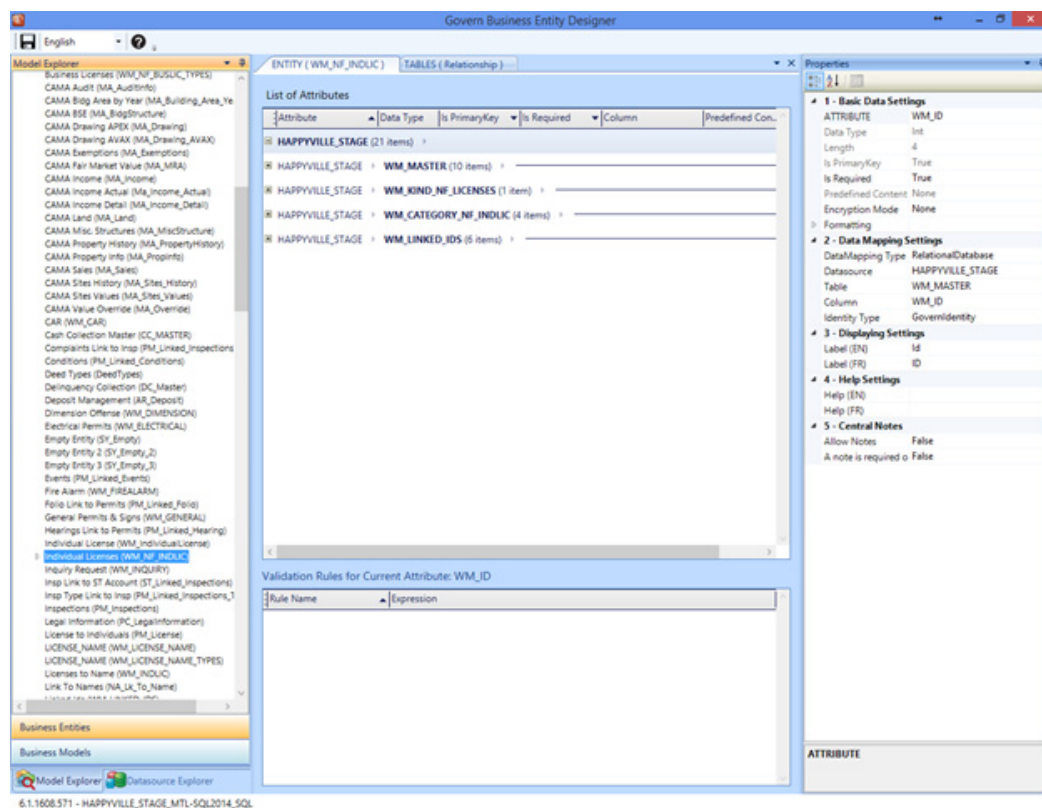3. Select the new model in the tree view.

Business Model for the New Workflow Kind
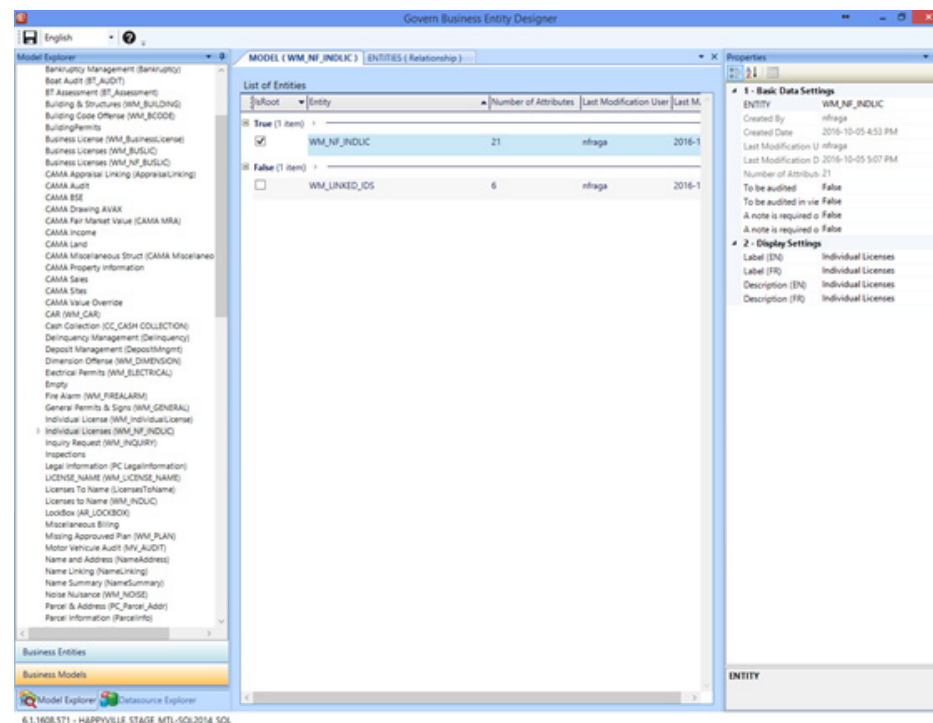
4. Double-click an entity in the model to open it in the Business Entity Designer.

   Alternatively, select the **Business Entities** explorer and select the entity.

Business Entities for the New Workflow Kind

Creating the Workflow Form in the OFD

Once the business model and entities are automatically created, you need to create the form manually in the OpenForms Designer (OFD). You need to add both the Workflow Management Controller and the Workflow Type Controller.

To create the form and add the Workflow Type Controller:

1. Launch the OpenForms Designer (OFD).

2. Click **New** to create a new form.

3. Select the Business Model in the **Select a Model** parameter.

4. Enter a name for the form in the **Form Name** parameter.

5. Enter a code in the **Form Code** parameter.

6. Click **OK**.

Adding the Workflow Controller

To add the workflow controller:

1. Open the new form in the OFD.

2. Select the ellipsis button beside **Controller** under **Controllers**.

   The Extension Selector opens.

3. Select **Only show classes that implement the custom control interface**.

4. Select **MsGovernOpenForms.CustomControls.dll** on the left.
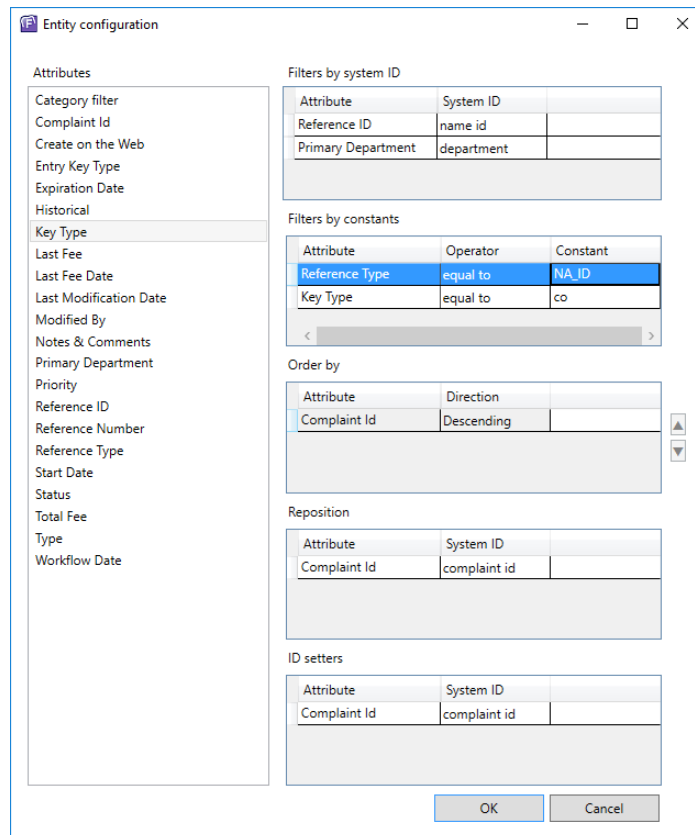
5. Select **WM_Controller**.
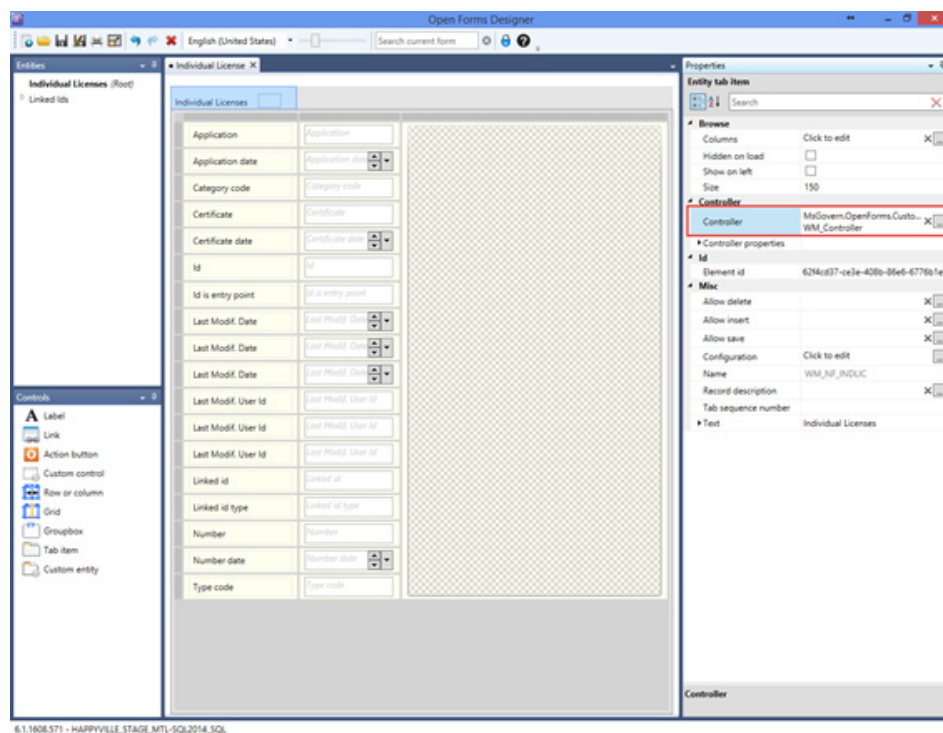
6. Click **OK** on the Extension Selector.

7. Click **Save** in the OFD.

Configuring the Controller

To configure the controller:

1. Open the workflow form in the OFD.

2. Select the ellipsis button beside **Configuration** in the **Properties** Explorer.

3. Under **Filter by System ID**:
   - Select **Reference ID** under **Attribute** and **Name ID** or **Parcel ID** under **System ID**.
   - Select **Primary Department** under **Attribute** and **Department** under **System ID**.

4. Under **Filter by Constants**:
   - Select **Reference ID** under **Attribute**. Select **Equal To** under **Operator** and **NA_ID** under **Constant**.
   - Select **Key Type** under **Attribute**. Select **Equal To** under and the required workflow key type under **System ID**.

5. Under **Order by**
   - Select the Workflow Type ID under **Attribute** and **Ascending** or **Descending** under **Direction**.

6. Under **Reposition**
   - Select the Workflow Type ID under **Attribute** and **System ID**.

7. Under **ID Setters**
   - Select the Workflow Type ID under **Attribute** and **System ID**.

8. Click **OK** on the Configuration window.

9. Click **Save** on the OFD.

Adding the Type Control

> **Note:** To enable the ability to create additional workflow types on the form, select the **IsAdditionalType** property under **Misc** > **Properties** > **Misc**.
>
> As with any custom control, security permissions can be applied.

In the OFD, Create the form for each model created by GNA and add the Workflow Controller and the Type Control into the root form.

1. Open the new form in the OFD.

2. Select Custom Control under Controls.

3. Drag the custom control to the form.

4. Click the ellipsis button beside **Action**

5. Select **MsGovern.OpenForms.CustomControls.WM_Type_Control**.

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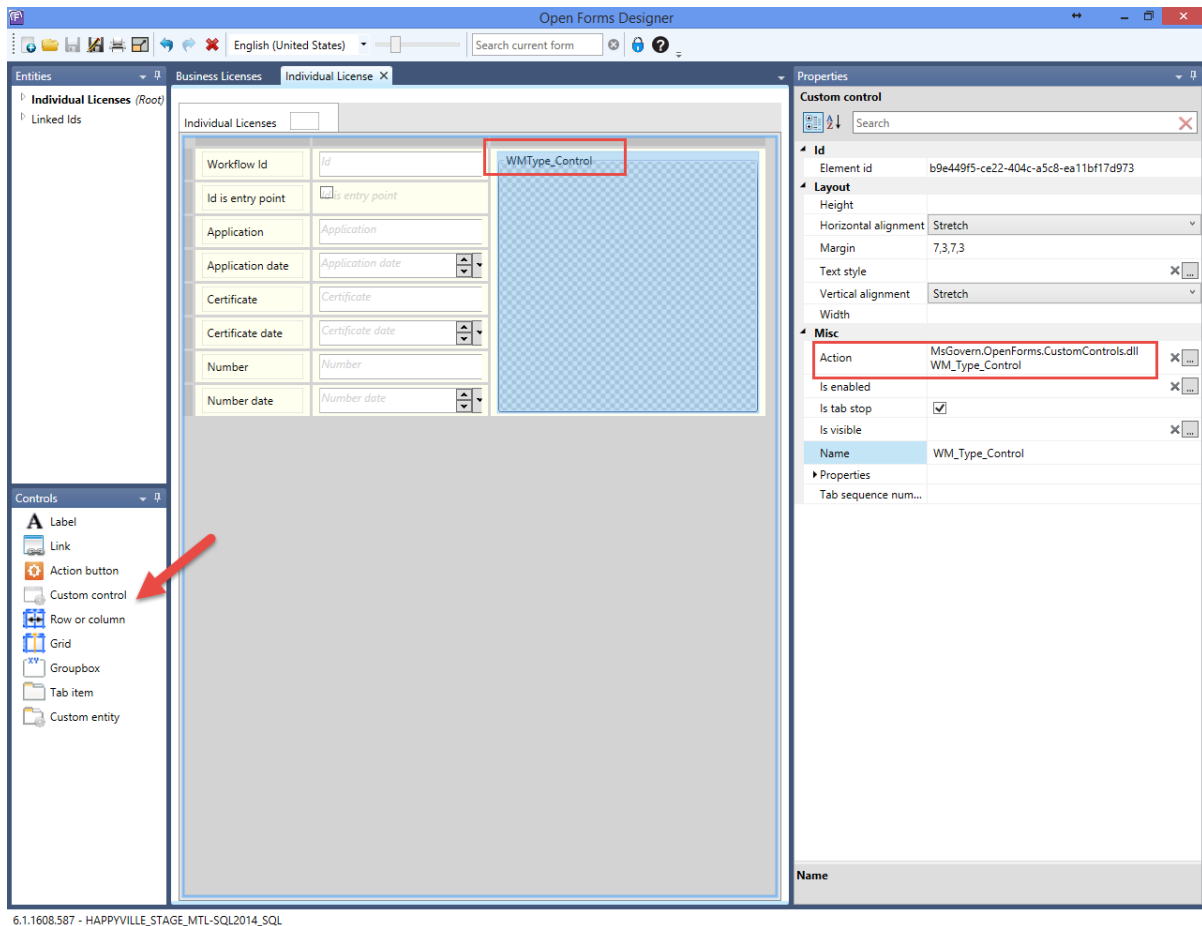
6. Optionally, in order to enable the ability to create additional types, expand **Properties** > **Misc** and select Is **AdditionalTypeComboBoxEnabled**.

    This enables the Additional Type combo box in GNA.

7. Click **Save**.

Adding the Form to a Profile

As with any new form, you need to add it to all required Profiles in GNA. Then, return to the OFD and set up the security permissions.

To add the form to a Profile:

1. Launch GNA.

2. Open the Profile Editor.

3. Select the required Profile.

4. Select the **Links** tab.

5. Click **Add** in the **Forms** section.

6. Select the form in the secondary window.

7. Click **Save**.

Adding Security Permissions to the Form

As with any new form, you need to add the security permissions in the OFD.

To add the security permissions:

1. Launch the OFD.

2. Open the required Workflow form.

3. Select the **Security** icon.

4. Select the required **Type** (Normal or Alternative), **Profile**, and **Role** or **user**.

5. Define permissions on all items as required.

6. Click **Save**.

7. Repeat steps 4 to 6 for all required combinations of Security Type, Profile, Role and User.

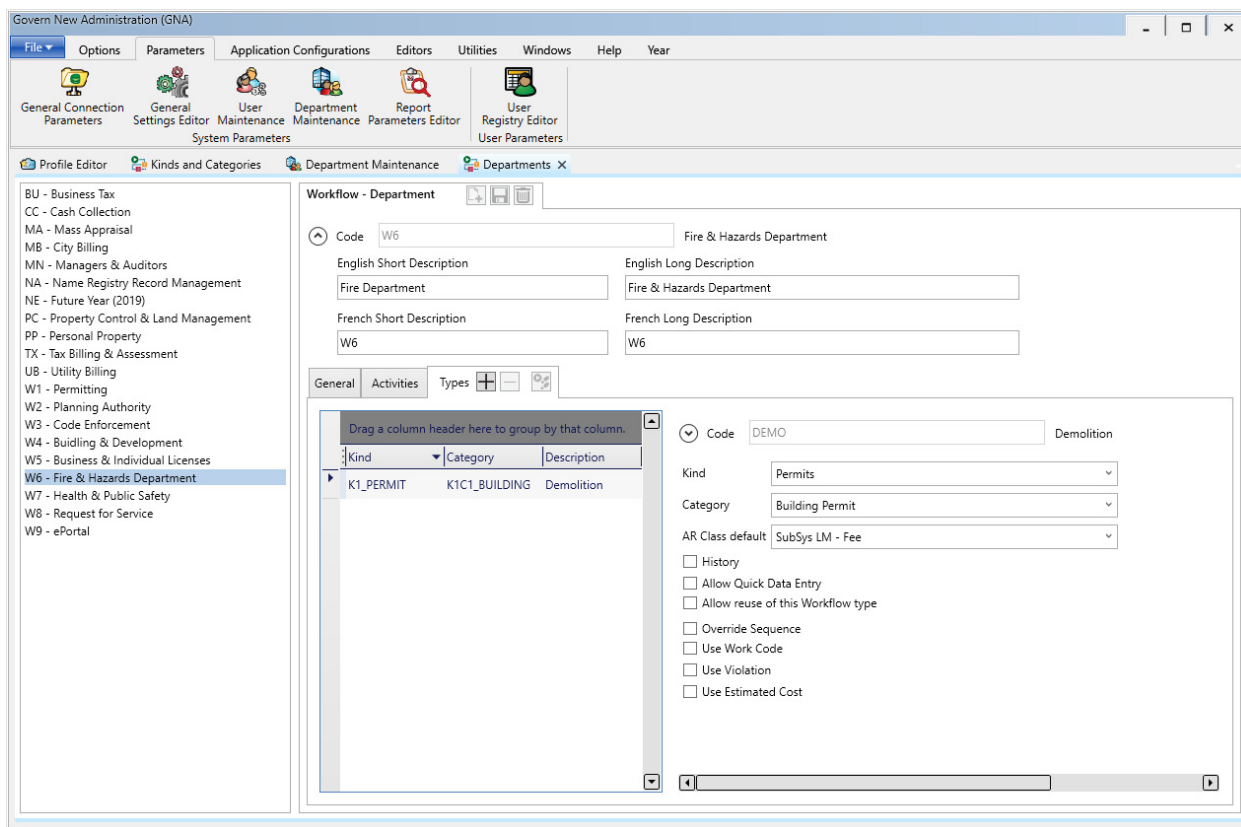# Creating a Workflow Type

Prerequisites

Before creating Workflow Types, ensure that:

- All required departments in the Department Maintenance form.
- All required Workflow Kinds and Categories are created.
- The **Allow Additional Types** option is selected on the **General** tab of the Workflow Management **Category**.
- The Display All Licenses Issued to the Individual is selected on the **General** tab of the Workflow Management **Department**.

Steps for Creating a Workflow Type

Perform the following steps in order to create a new Workflow Type:

1. Launch GNA.

2. Select **Applications Configurations** > **Workflow Management** > **Departments**.

All the departments in the deployment are listed on the left.

3. Select a department.

4. Select the **Types** tab.

5. Enter a code for Department Types in the **Code** parameter.

6. Select a kind from the **Kind** combo box.

   All the kinds created on the Workflow Kind and Categories form are displayed.

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7. Select a category from the **Category** parameter.

   All the categories created on the Workflow Kind and Categories form are displayed.

8. Select a default A/R Class from the **Default A/R Class** parameter.

   All the A/R Classes created for Workflow Management are displayed.

9. Click **Save**.