

Workflow Workshop

Agenda

- ▶ Workflow Example
- ▶ Before Workflow
- ▶ Workflow Setup
- ▶ Form in OFD
- ▶ Form in Govern
- ▶ Building Workflow from A-Z

Workflow Example

Violation

Category Name

Activity

Name Links

Other Links

Multimedia

Type

Marijuana

Liquor

Name & Address Information

Name

Lionel Aadland

Address

1850 24th Street NE

[More Information](#)

Summary

Status

Detail

Kind

Category

Department

Application

License/Permit

Certificate

Status

Expiration

Primary Contact

All

Before Workflow

- ▶ A/R Class
 - ▶ Application Configurations > A/R > A/R Class
 - ▶ Same Year and Sub System from Profile

Email Template Editor | Departments | (01 - LIQ) All - Liquor | (01 - MAR) All - Marijuana | A/R Class (2017)

A/R Class

▼ wm_LM_Bill - WM LM Billed

Subsystem	Land Management	Link to Inter
Cycle		Link to Pena
Transaction Type	Billed	Link to Disc
Interest/Penalty Method	Interest, Fixed % (10)	Link to MCR
Tax Title/Lien A/R Class		Bankruptcy

- ▶ Reports
 - ▶ Parameters > Report Parameters Editor

Email Template Editor | Report Parameters Editor

ar-rpt-004.rpt - AR - Cash Balance

Report

Report Name: ar-rpt-004.rpt

☐ Audit Trail

Recordset Key: AR - Cash Balance

Account Receivable ID

Report Criteria

Criteria Key

Alternate Connection Key Properties

DataSource	Alternate Connection Key
MTL-SQL2014.CTG	

Report Group

Upper Level

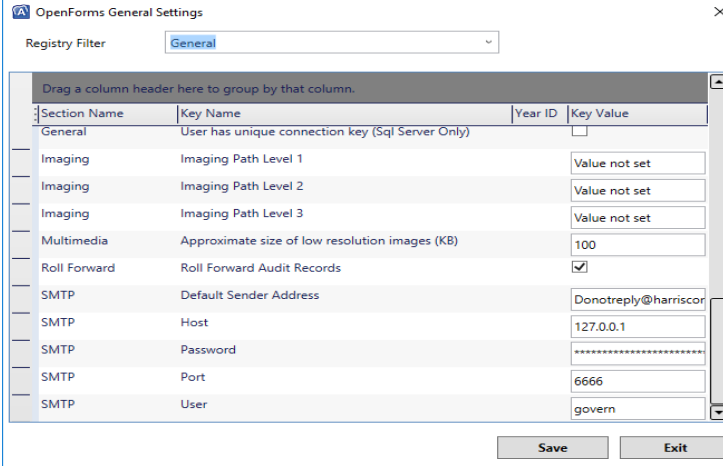
Lower Level

Add Criteria Key

Remove Criteria Key

Before Workflow

- ▶ SMTP
 - ▶ Parameters > General Settings
 - ▶ Register Filter = General > SMTP



OpenForms General Settings

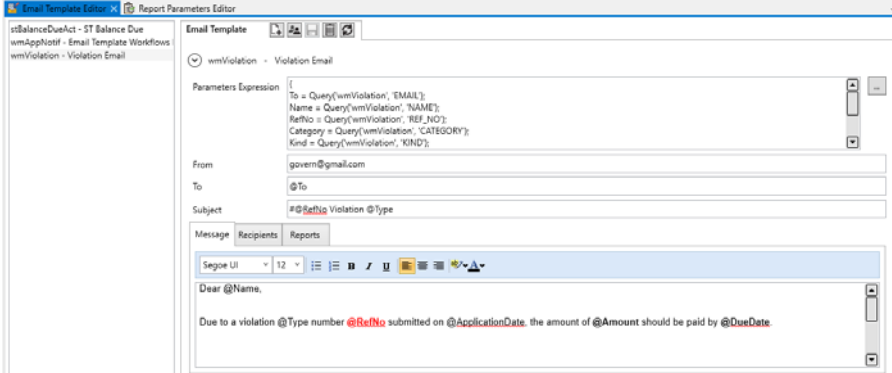
Registry Filter: General

Drag a column header here to group by that column.

Section Name	Key Name	Year ID	Key Value
General	User has unique connection key (Sql Server Only)	<input type="checkbox"/>	
Imaging	Imaging Path Level 1		Value not set
Imaging	Imaging Path Level 2		Value not set
Imaging	Imaging Path Level 3		Value not set
Multimedia	Approximate size of low resolution images (KB)		100
Roll Forward	Roll Forward Audit Records	<input checked="" type="checkbox"/>	
SMTP	Default Sender Address		Donotreply@harriscor
SMTP	Host		127.0.0.1
SMTP	Password		*****
SMTP	Port		6666
SMTP	User		govern

Save Exit

- ▶ Email Template
 - ▶ Editors > Email Template Editor



Email Template Editor

Report Parameters Editor

stBalanceDueAct - ST Balance Due
wmAppHost - Email Template Workflows
wmViolation - Violation Email

Email Template

Parameters Expression

```
To = Query(wmViolation, 'EMAIL');  
Name = Query(wmViolation, 'NAME');  
RefNo = Query(wmViolation, 'REFNO');  
Category = Query(wmViolation, 'CATEGORY');  
Kind = Query(wmViolation, 'KIND');
```

From: govern@gmail.com

To: @To

Subject: #@RefNo Violation @Type

Message Recipients Reports

Segoe UI 12

Dear @Name,

Due to a violation @Type number @RefNo submitted on @ApplicationDate, the amount of @Amount should be paid by @DueDate.

Before Workflow

- ▶ Standard Template Forms
 - ▶ Utilities > Import Data From File
 - ▶ FormReference.XML

Import Data From File

Destination Connection Key: WORKFLOW_DEMO_MTL-SQL2014_SQL

File to import: X:\Deployments\WORKFLOW_DEMO\SystemFiles\FormReference.XML

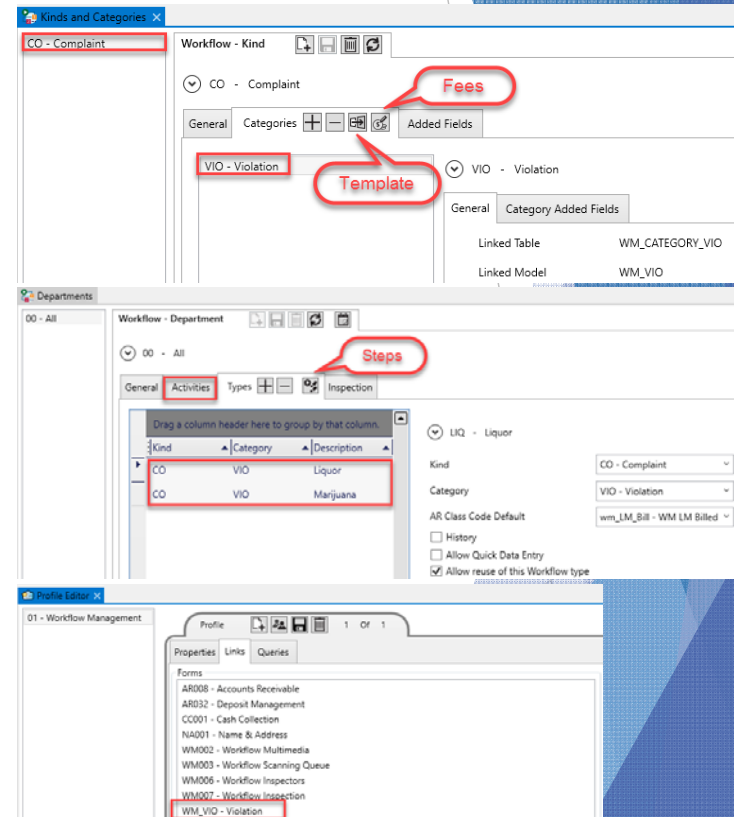
OpenForms

☐ Select all

<input type="checkbox"/> TX008 - Tax Increment Financing	Skip
<input checked="" type="checkbox"/> WM_DEAT - Workflow Department Additional Types Template	New
<input checked="" type="checkbox"/> WM_DET - Workflow Department Template	New
<input checked="" type="checkbox"/> WM_NAAT - Workflow Name Additional Types Template	New
<input checked="" type="checkbox"/> WM_NAT - Workflow Name Template	New
<input checked="" type="checkbox"/> WM_PCAT - Workflow Parcel Additional Types Template	New
<input checked="" type="checkbox"/> WM_PCT - Workflow Parcel Template	New
<input type="checkbox"/> WM002 - Workflow Multimedia	Skip

Workflow Setup

- ▶ Application Configuration > Workflow Management
 - ▶ Kinds and Categories
 - ▶ Kind
 - ▶ Apply Template Form
 - ▶ Fees
 - ▶ Category
 - ▶ Department
 - ▶ Activities
 - ▶ Actions
 - ▶ Types (by kind & category)
 - ▶ Steps
 - ▶ Activities
 - ▶ Actions
 - ▶ Editors > Profile Editor
 - ▶ Add form



Form in OFD

Open Forms Designer

English (United States) Search Current Form

Violation

Category Name Activity Name Links Other Links Multimedia

WMType_Control

Name & Address Information

Name	[Expression]
Address	[Expression]
More Information	

Summary

[Expression]	[Expression]	[Expression]
Status	[Expression]	

Detail

Kind	Category	Department
[Expression]	[Expression]	[Expression]
Application	Application	Application date
License/Permit	Number	Number date
Certificate	Certificate	Certificate date
Status	Status	
Expiration	Expiration Date	
Primary Contact	[Expression]	

6.1.1707.864 - QA_DEMO_MTL-SQL2014_SQL

Form in Govern

The screenshot displays the 'Govern' application interface. The top menu bar includes 'Home', 'View', 'Options', 'Tools', and 'Help'. Below the menu, there's a 'Global Messages' section. The main content area is titled 'Workflow Management (2017)' and shows a 'Violation' record. On the left, a 'Dataset Treeview' lists various users. The main panel displays details for a 'Liquor' violation, including a summary, name and address information, and a detailed form with fields for application, license/permit, certificate, status, expiration, and primary contact.

Violations

2017
1/11/2018
Global Messages

Workflow Management (2017)

Dataset Treeview

- Lionel Aadland
- Graham Alexander
- Patricia Alexander
- Victor Bistriz
- Violet Bistriz
- Ben Bowie
- Darlene Boychuk
- Sam Boychuk
- Melinda Brace
- Brian Bradley
- Robert Brothwell
- Robert Carignan
- Rosaline Carignan
- Beverley Cieckiewicz
- Marion Cieckiewicz
- Jane Cormack
- Denys Dagg
- Fern Dagg
- Lauren Dixon
- Leehan Dixon
- John Doe
- Barbara Driscoll
- Jeremy Dueck
- Anna Fehr

Accounts Receivable

Violation

Category Name: 2 of 3

Type: Liquor

Summary

Certificate Status **C-00000007** **Closed**

Name & Address Information

Name: Lionel Aadland
Address: 1850 24th Street NE
[More Information](#)

Detail

Kind	Category	Department
Complaint	Violation	All
Application	A-00000001	12/28/2017
License/Permit	N-00000001	12/28/2017
Certificate	C-00000007	12/28/2017
Status	Closed	
Expiration	1/27/2018	
Primary Contact	N/A	

Dataset Treeview Forms Explorer Reports Explorer Batch Process

Form in Govern

The screenshot displays the Govern software interface, which is used for managing various government services. The main window shows a workflow management screen for the year 2017, with a date filter set to 12/28/2017. The workflow tree on the left lists various services, including Accounts Receivable, Deposit Management, Name & Address, Property Information, Workflow Inspectors, Workflow Inspection, Workflow Multimedia, Workflow Scanning Queue, Cash Collection, Pet License, and Violation. The main area displays a list of activities for the 'Violation' category, including '1 Receive Complaint', '2 First Time Fee', '4 Send/Print Documentation', and '5 Payment'. A red arrow points from the '1 Receive Complaint' activity to a detailed view of the activity, which shows the steps: '1 Add name to violation', '2 First time violation?', '4 Send email', '5 Send letter', and '5 Payment'. Another red arrow points from the '4 Send email' step to an email template window, which shows the email content for a violation. A third red arrow points from the '5 Send letter' step to a window showing a generated 'Violation Letter' for Lionel Aadland.

Workflow Management (2017)

Global Information

Dataset Treeview

- Lionel Aadland
 - Accounts Receivable
 - Deposit Management
 - Name & Address
 - Property Information
 - Workflow Inspectors
 - Workflow Inspection
 - Workflow Multimedia
 - Workflow Scanning Queue
 - Cash Collection
 - Pet License
 - Violation
- Graham Alexander
- Patricia Alexander
- Victor Bistriz
- Violet Bistriz
- Ben Bowie
- Darlene Boychuk

Violation

Category Name Activity Name Links Other Links Multimedia

1 Receive Complaint Initiated

1 Add name to violation Initiated 12/28/2017

2 First Time Fee

2 First time violation?

4 Send/Print Documentation

5 Send email

5 Send letter

5 Payment

7 Payment received?

6 Close Complaint

Activity: 1 Add name to

Details

Start Date

Target Date

Completion Date

Total Time

Assigned To

Note

Multimedia

Save

Complete and Save

Violation Letter

Lionel Aadland
1600 Rene-Levesque Blvd West Suite 620
Montreal, QC H3M 1S9
Phone: 514 876 1199
Toll-Free: 800-561-8155

Dear Lionel Aadland,

Due to a violation Marijuana number C-00000010 submitted on 12/28/2017, the amount of 200.0000 should be paid by 1/27/2018 12:38:40 PM.

Sincerely,
Harris Govern

<http://www.msgovern.com>

1600 Rene-Levesque Blvd West Suite 620
Montreal, QC H3M 1S9
Phone: 514 876 1199
Toll-Free: 800-561-8155

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