

WEBCON BPS 2016

New features and improvements.



WEBCON BPS 2016 is the newest version of the system, which now has numerous breakthrough features and plenty of improvements and fixes. We listen to our clients and partners and try to meet their demands by making sure that the system fulfils extensive requirements, from both the technological and business perspective. This document covers the most important changes.

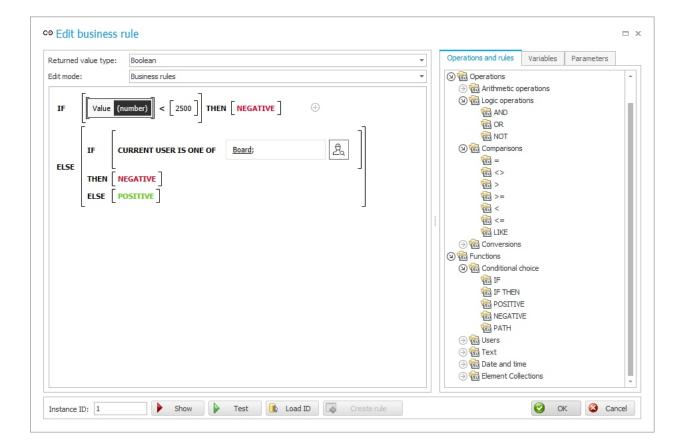
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01 BUSINESS RULES ENGINE

The completely new business rules engine is the most important feature introduced in WEBCON BPS 2016. It is an easy-to-use tool for business users who want to create advanced applications with WEBCON Designer Studio.

The business rules engine allows for creating numerous conditions (e.g. for executing actions, entering default values, etc.) with a graphical editor and a user-friendly drag and drop interface. Please note that experience in writing SQL queries is not required.



Once created, the business rules can reused in many places. As a result, the provided solution is not only faster, but it is also easier to make modifications because the changes entered in the universal rule are propagated everywhere it is used. Furthermore, it is very easy to check where the given rule is used – after you choose the appropriate option in the Designer Studio, the system indicates all such locations.

However, implementation of business rules in WEBCON BPS 2016 does not mean that conditions created traditionally with SQL queries have been abandoned. To use the system the same way as before, you just have to choose the SQL mode. SQL queries created manually can also be saved as business rules and used in many places simultaneously.

02 WHOLE NEW LEVEL OF FORMS CREATION

The new version of WEBCON BPS provides plenty of functions and improvements in form creation, the most important ones being:

MORE DESIGN FREEDOM, SAME DELIVERY TIME

In response to numerous suggestions, we have introduced more options to adjust the form structure and appearance to the end client's individual requirements. Compared to the previous version, there are now four panels (top, bottom, right, left) storing form fields instead of the previous two.

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	Supervisor	Lukasz Wrobel								
by:	Requisition									
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16				238	133.00	100.00	233.00	53.59	286.59	
by:	Title *	WEBCON BPS		22% 08%	0.00	0.00	0.00	0.00		
Rykiert 🗌	Description *	The best BPM platform for SHARE	POINT!	078	0.00	0.00	0.00	0.00		
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WEBCON BPS 2016 also has the option of changing the location of previously fixed elements, i.e:

- attachment area
- attachment preview
- task/step details
- comment field
- instance ID

These changes considerably increase the freedom of creating forms in the system while preserving the key feature of WEBCON BPS – the ability to provide a ready solution in a very short time, with no need to start designing from scratch.

NEW FORM FIELD ARRANGEMENT – TAB PANEL

Complex forms with many fields, tables, and graphical reports require appropriate means allowing for friendly and ordered presentation of all required data. Besides the field groups introduced in the previous version (8.0), WEBCON BPS 2016 also introduces a tab panel.

s 🕻	Home WEBCON BPS	BPS		Search this site
Information Process: Cost approval	₿ RELOAD			🔅 admin
Form type: Invoice	Registered by	Jacek Język	ATTACHMENTS ALL ATTACHMENT	5 🖭 📤
Workflow: Cost approval	DANE FAKTURY DANE	KONTRAHENTA OPIS MERYTORYCZNY	Comments	
Steps	Kontrahent *	WEBCON:		
→ Registration	NIP	6762414097		
 Verification Acceptance 	Adres	ul. Skotnicka 252a, 30-394 Kraków		
 Accounting control 	Miasto	Kraków		
Archived	Kod pocztowy	30-394		
Details Created by: Jacek Język	Data rejestracji * required fields	7/19/2016		
Created date: 7/19/2016	Predefined paths:			
Modified by: Jacek Język	Save Register			
Modified: 7/19/2016				Version: 2016.1.0.8134
Version: 1				

Like the field groups, it is available as a separate form field. The user-friendly drag & drop interface allows for entering specific fields in defined tabs and changing the order in which they are displayed.

The tabs enable users to display e.g. a series of graphical reports without them taking up too much space.

New global form template

WEBCON BPS 2016 also sees the introduction of a new form editor. The biggest change from the previous version is how fields are presented. The current view reflects the arrangement displayed to end users much better. It is also possible to quickly preview a form embedded in SharePoint at every workflow step. Furthermore, the form editor can be displayed in full-screen mode for more convenience, especially on low-resolution monitors.

Thanks to these changes, the forms are much easier and more intuitive to work with.

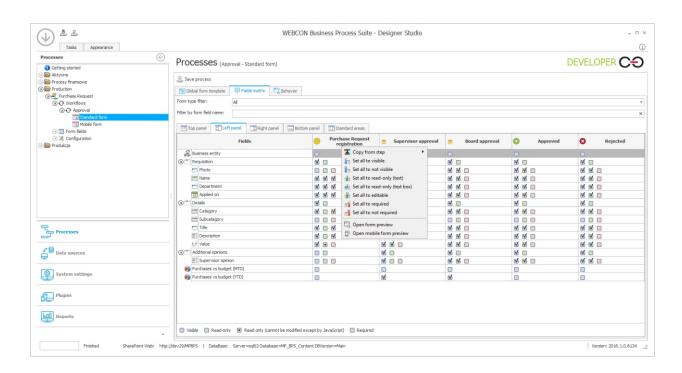
MPROVED FIELD MATRIX

The field matrix has also undergone ergonomic improvements. In addition to the new appearance and colors, there is also a new context menu allowing for:

- Setting the behavior of the given field in all workflow steps simultaneously
- Setting the behavior of all fields in one step simultaneously
- Expanding all field groups and tabs with a single click

		WEBCON Busines	s Process Suite - Desig	gner Studio		_ = ×
Tasks Appearance Processes	Processes (Approval - Standar	rd form)				
○ Advance ○ Production ○ Production	Save process Gobal form template Fill Sceen mode Form type filter: All	rix C Behavior				
 X Configuration Produces Processes Data sources 	A System areas System areas System areas Form properties Edit mode: □□ Default Edit □□ Default Edit □□ Pedaut Edit □ □ □ □ Pedaut Edit □	Business entity Business entity Business entity Category				
System settings		E Requested items	1.1 Qnty	1.1 Price	Value	Comments
Reports					nent preview	
Finished SharePoint Web: http:	//dev29/MPBPS DataBase: Server=sql02.0	 Database =MP_BPS_Content D8Versio	in=Main			Version: 2016.1.0.8134 .::

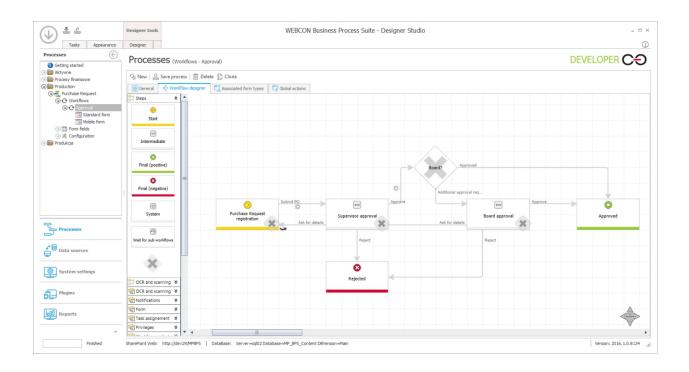
Furthermore, it is also possible to quickly preview the form at any stage from the field matrix, on mobile devices as well.



03 DESIGNER STUDIO AND GRAPHICAL EDITOR REVAMPED

The 2016 version sees an extensive facelift of Designer Studio. The application has been equipped with a modern skin, which meets current standards and trends.

The graphical workflow editor has also undergone considerable changes. Its graphical elements have been simplified and now combine minimalism with functionality. Other improvements include all elements associated with dragging and dropping steps and paths. Instead of selecting less frequent types of steps from the configuration view (e.g. Wait for Subworkflows), they can also be dragged and dropped.



Furthermore, the arrangement of individual elements of the process tree has been changed to a more intuitive one to meet implementation realities.

04 SUPPORT FOR SHAREPOINT 2016

WEBCON BPS 2016 is fully integrated with the newest version of SharePoint (2016). As far as the end user's interface is concerned, the system behaves the same as in the previous version of Microsoft's platform. The appearance and colors of the forms and webparts will be adapted to SharePoint's interface.

SharePoint				Rykiert	
				🖓 SHARE 🖧 FOLLOW	
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	PR/2016/0009)			
Information Process: Purchase Request	→ RETURN ← CANCEL EDITING +	NEW 🖬 SAVE 🗟 DELETE 🖉 RELOAD 🗅 NEW E-MAIL 🗅 DOG	JMENTS	🔯 ADMIN	
Form type: Purchase Request	Requisition		Task details		
Workflow: Approval	Photo		Manager approval Please verify the Purchase Request form submitted by your e	employee.	
Steps Purchase Request registration	Name	Michal Rykiert	Reports		
Manager approval Approved	Applied on	8/9/2016	OTHER PURCHASE REQUESTS AX FIXED ASSETS BUDGET SPENDING	5	
Details Created by: Michal Rykiert	Details Category	Software	Purchases vs budget (YTI	ð	
Created date: 8/9/2016	Title Description	WEBCON BPS	Grouped O Stacked	es Value (YTD) 😑 Current Year Budget	
Modified by: Michal Rykiert	Additional opinions		10000		
Modified: 8/9/2016 Version:	Supervisor opinion	Looks perfect to me			
2 Assigned to:	Requested items				1
Luke Skywalker Process supervisor:	Please choose items to apply for.	Octore Direct Molecet	0. Current year to date		
Luke Skywalker History Instructions	Requested item *	Qnty * Price * Value * 0.00 €	Actions		
and actions			ATTACHMENTS ALL ATTACHMENTS	U 📥 🛍	

If you are planning migration to the newest version of SharePoint, contact WEBCON's technical support department or a WEBCON partner.

Please note WEBCON BPS 2016 does not support SharePoint 2010 or previous versions of this platform.

05 OCR – CUSTOM DOCUMENT RECOGNITION TEMPLATES

The previous release of WEBCON BPS (8.3) introduced a completely new, neural network-based OCR technology. Its advantage is the fact that it can be taught to increase recognition accuracy. The new solution was first applied to Polish cost invoices, where a universal template was used, recognizing the sales date, net/gross amount, or bank account number.

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	Vendor information					
	Vendor *	Audi	WEB CƏN°			
	Vendor ID	811285573				
		811285573	WEBCON Sp. z o.o.			
	Full adress	Gutenbergstraße 84-86 24118 Kiel	ul. Babińskiego 69 30-393 Kraków			
	Zip code	24118 Kiel	phone: +48 12 443 13 VAT ID: <mark>676-241-40-97</mark>			
	Street name	Gutenbergstraße 84-86		-		
	City	Kiel				
	Phone number	5 44 46-0	то:			
	Document information		Joe Black Dark Street, District Robb	er		
	Invoice number *	151351	6669 Ankh - Morpork			
		15135				
	Invoice date *	4/9/2010	COMMENTS OR SPECI	AL INSTRUCTIONS:		
		09.04.2010				
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	Payment term		Steve	666	Joe Black	

The 2016 release of WEBCON BPS is another milestone in the development of OCR potential as it introduces the option of creating so-called custom fields (not recognized in the universal recognition template). This allows for application of the recognition mechanism to numerous document types.

Custom field creation is intuitive and does not require any special knowledge or programming skills. To ensure that the desired data is recognized correctly, it is necessary to teach the neural networks which information to find and where to find it. This is an easy process, based on specifying the appropriate values from the scan preview and selecting the teaching path on the form. It will be more effective with each iteration.

The following validation mechanisms can also be used to increase recognition accuracy:

- Regular expression all standard fields can be validated with regular expressions, which sees the system recognize only the information fulfilling specific conditions
- Data source when it is possible to predict what kind of data will appear on the document (e.g. bank account number, phone number), a data source can be assigned to a custom field and the system will recognize only the information contained in the source file prepared earlier (e.g. a list of bank account numbers of all business partners)

Application examples

Thanks to the new possibilities offered by OCR in WEBCON BPS, it is now possible to create content recognition templates for various types of documents, including the less typical ones. The custom field creation function allows for e.g. creation of a mechanism recognizing the information from collected business cards. All you have to do is take a picture and upload it to the system (manually or by email), which will read the information such as first and last name, email address, company name, etc., thus considerably reducing the time required to enter the information into the database.

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		Tel: +48 12 443 13 92, Fax: +48 12 443 13 75 www.webcon.pl

There are plans to introduce more functions to expand OCR capabilities in future versions of the system, including the option to recognize complex phrases or questionnaires.

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06 CREATION OF SQL QUERIES SIMPLIFIED

New query creator for the SQL grid field

Following the business rules engine, the next change which aims to make it easier to use the information in the database is the new SQL query creator for the SQL Grid field.

In many cases, it is required to display a list of related or subordinate elements in the form. The SQL Grid field, which displays the data returned in the manner specified by an SQL query, is very useful here. For user convenience, the metadata concerning the associated elements are provided with a hyperlink to the given element.

The 2016 version introduces a modified creator, which allows for very quick creation of SQL queries for the SQL Grid field. Knowledge of the database structure or writing queries is not required.

The creator provides three modes, which narrow down the results to:

- All child instances
- Selected child instances
- Selected child instances with field relation

The creator also enables to choose which metadata of the form should appear in the table. The creator generates an SQL query. The query will contain all the elements selected during the configuration process and will be ready for use with the SQL Grid.

NCREASED SQL QUERY TRANSPARENCY

When creating SQL queries, it is often necessary to refer to the data contained in the processes that are external to the one that is being configured. In order to work with attribute values, one has to know the names of the columns where they are stored (e.g. WFD_AttDateTime1 for data field). The 2016 version allows for dragging the variable from the editor, which will not only display the name of the column in the database but will also indicate the name of the field displayed to end users. As a result, SQL queries are more legible and easier to understand in the business context.

07 REST WEB SERVICE INVOCATION EASIER THAN EVER

nvoking REST Web Service

As we develop the system, we strive to make it as easy to use as possible and provide many options available without having to write the code to use them. This strategy has produced the debut of a dedicated action invoking REST Web services, which is an excellent and easy-to-use connector for systems such as SalesForce or Microsoft Dynamics CRM. To collect data, configure the action and invoke it at any stage of the process. The data both sent and returned by the service can be easily mapped into appropriate form fields, saved in the database, or displayed in the form.

- Invoke REST Web service				
Authentication Request d	ata JSON Response		earch in tree	
Authentication type	Salesforce		lame	
User	j.jezyk@webcon.pl		∋ System fields ⇒ Form fields	
Password	*******		 Constants 	
Authentication service URL	https://login.salesforce.com/services/oauth2/token		 Objects' identifier 	
Client ID	Mdk34fdSFGlhklsR67cssWYhoKbH4BqxrqnWZWFybkipgvi JnEmzZ27IEdk9UD2Gy	dWpx		
Client Secret	234833568352245671			
Base service instance URL	https://eu6.salesforce.com/			
		1	Switch all editors into advanced edit mode	

WEB SERVICE REST AS A DATA SOURCE

To further facilitate integration with external systems, we have also included the option of creating a data source based on the REST Web Service.

This source allows for invoking the REST Web Service with any JSON object and using both constant values and (dynamic) field values. Similarly to the SOAP source (introduced in version 8.3), there is also the option of choosing the source data filtering method through the Web Service or through WEBCON BPS.

Tasks Appearance	WEBCON Business Process Suite - De	ilgner Studio _ □ □ :
Data sources	Data sources (REST WebService - [Dynamics] Employee between)	
SharePoint list SharePoint list Domain users	Ro New 🖉 Save 🌐 Delete 🖺 Clone 🧟 Data source usage	
Oracle database	ID: 81	- Web service invocation configuration
⊙ ₩ System ⊙ K Custom	Name: [Dynamics] Employee between	Request Response
SharePoint users	Superior source: <none></none>	
SOAP Web Service	Business entity: diane>	Suffix URL: v8.0/accounts?\$select=name,numberofemployees&\$filter=Microsoft.Dynamics.CRM.Between(
REST Web Service Dynamics) Employee between	Description:	HTTP Method: GET +
[Dynamics] FilterCompanies	Dest prom	Name Value
[Salesforce]SObjects		Parameters 🗒 Add
		🔚 Remove
	Data source type: REST Web Service *	
	Public data source	
		C Kontynuuj wykonanie gdy status HTTP należy do 400 lub 500
		Filter mode Using BPS *
	Common DEV TEST PROD	
-	REST Web Service connection settings	JSON:
Processes	Base URL: https://webconzoo.crm4.dynamics.com/api/data/	
	Authentication: DynamicsCRM *	
Data sources	User: k.wozniak@webcon.pl	
-	Password: *********	
System settings	Authorization URL:	
Plugins	Clent ID: 2c1cf12b-c7e3-4101-8b48-343d59b6db92	
	Clent Secret	
Reports		
		C Edt
Finished Shar	ePoint Web: http://dev29/MPBPS DataBase: Server=sql02 Database=MP_BPS_Content D8Version=Main	Version: 2016.1.0.8134

The embedded authentication templates allow for quick configuration and activation of a source collecting data from the systems, i.e. SalesForce or Dynamics CRM, thanks to which integration with said systems does not require implementation of data sources with SDK.

Application example

Using the REST Web Service as a data source makes it possible to easily use data stored in SalesForce via form in WEBCON BPS. For instance to select a vendor. If it is not in SalesForce databse, WEBCON BPS provides the option of adding a new record through the same interface, with no need for direct intervention in SalesForce.

08 WEBCON BPS DATABASE ARCHIVING

For the benefit of the clients who have been using WEBCON BPS for years, the newest version of the system offers data management and archiving mechanisms, which reduce the production size of the database while providing the same access to desired information.

The archiving mechanism allows for moving data from the production database to the archive database from the level of the action performed by the system.

There are three modes of managing archive data:

- Move to archive database the workflow instances will be saved in a separate database but on the same server. This makes it possible to view archive information from an appropriately configured Show Workflow Elements Web Part. This option provides the user with access to all historical data and related attachments
- Move to external network location the workflow instances will be saved on a selected network drive as .zip files containing a PDF file with form metadata, an XML file with the history of the workflow element, and attachments (with the option of archiving only their most recent versions)
- Remove from content database selected workflow instances will be completely removed from the operating database and no copies will be saved

The archive data management mechanisms are available and executable from the level of the new "Archive elements" action.

09 FUNCTIONAL IMPROVEMENTS

DYNAMIC GENERATION OF HYPERLINKS ON SWE REPORTS

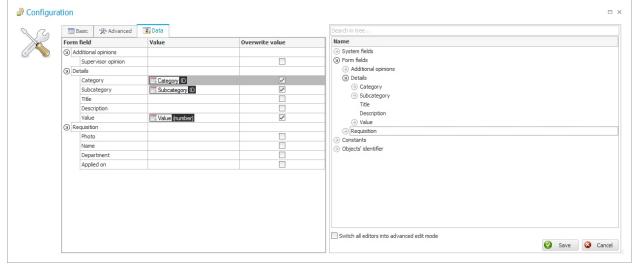
The newest version of the system increases the functional range of the calculated fields presented in the Show Workflow Elements Web Part. Now, the values in the calculated column can be displayed as hyperlinks. This enables to generate dynamic links in SWE reports, which for example makes it possible to display and access related purchase orders on a list of all invoices, with no need for a manual search.

Q SHOW SEARCH PANEL ₽ RELOAD							
Invoice number	Step	Assigned to	Gross amount Purche order				
FK/2016/07/00007	Verification	Tom Green	7200.00 ZAM/2016/0008665				
FK/2016/07/00006	Acceptance	Jacek Język	4800.00 ZAM/2016/0003445				
FK/2016/07/00005	Acceptance	Jacek Język	3560.00 ZAM/2016/0003442				
FK/2016/07/00004	Accounting control	Marcin Kapusta	5000.00 ZAM/2016/004456				
FK/2016/07/00003	Acceptance	Jacek Język	2900.00 ZAM/2016/0002766				
FK/2016/07/00002	Verification	Tom Green	3500.00 ZAM/20160/0003				
FK/2016/07/00001	Accounting control	Marcin Kapusta	1200.00 ZAM/2016/000234				

EXPANSION OF THE UPDATE PARENT WORKFLOW ACTION

The newest version of the system offers an expanded "Update parent workflow" action, which now has the option of selecting the dependent workflow instance using an SQL query and by selecting the form field storing the ID of the related element. As a result, the workflow has much more potential in updating related instances.

Expansion of the action is accompanied by the change of its name to "Update related workflow instance".



MOVING AND COPYING ATTACHMENTS BETWEEN WORKFLOW INSTANCES

The new version of the system also includes moving and copying attachments, which is very useful in all kinds of quality management processes (e.g. ISO). It allows for all mandatory and accessible documents and procedures to be stored in WEBCON BPS in scope of an archive workflow and be easily modified (with acceptance) in a separate documentation change management workflow. Then, after the final acceptance, the documents in the archive workflow can be overwritten (a new file version is created) or replaced with new ones (the original version is always available).

CHANGED STRUCTURE OF TREE ELEMENTS IN DESIGNER STUDIO

The changes to the process tree element structure are aimed to improve work with Designer Studio. The global form template and field matrix are now available under the name "Standard form" directly under the configured workflow definition. The display settings for mobile devices ("Mobile form") are also presented below.

Furthermore, all configuration options not associated directly with business logic of the workflow (steps, paths) and form fields are available in the "Configuration" node, which also holds form types (formerly known as document types), action templates, business rules, and constants.

CYCLICAL ACTIONS – PARALLEL EXECUTION

The 2016 version also brings changes to the mechanism of cyclical actions defined in the workflow definition. The introduced changes see cyclical actions being activated in multiple layers. When the activation cycles overlap in time, each action will be activated independently and they will be performed simultaneously. Similarly, when activation of an action is prolonged and overlaps with the activation cycle of a different action, it will not stop the activation. The new action will be started independently in a different layer, which makes it possible to activate it precisely at the configured time.

The described changes introduce superior precision and repeatability of cyclical actions, which consequentially improves the stability of the BPS functions based on this element.

NT authentication in Designer Studio

WEBCON BPS Studio activation and process changing requires appropriate authentication. The 2016 version allows to enter the domain user and authentication password on start-up. This function enables users to work with BPS Studio on computers outside of the company's domain.

10 ERGONOMIC IMPROVEMENTS

Each new version of the system introduces changes aimed to improve the ergonomics of WEBCON BPS. The 2016 introduces the following improvements:

Path as a node in action configuration

When there are multiple paths defined in the step, the list of actions presents information on the path used for configuration of the given action. This makes action management easier and more transparent.

🗑 General 🗮 Forms 🕏 Paths 📝 🗛	ctions Analysis		Flow control	📾 Subworkf	lows settings	
Action list		-	Settings			
📮 On entry	Add 🛃		- Action del	tails		
On exit	📑 From templa		ID:		-6	Order: 0
On timeout On browser opening	-				✓ Active	
Proviser opening Proviser opening Proviser opening	Add group					
Aa Generate PR	🖪 Delete		Name:		On path	
🕑 🕞 On path	Clone		Description:			
(a) 🖶 Approve			Template:		<none></none>	✓ Configure template
 Complete the supervisor opinion Ask for details 	Create templa		Execution co			
Validate	Move up		Execution co			
(9) 🖶 Reject	Move down					
i Send notification						
X On element deleting						
On element saving Attachments menu						
On attachment add						
			0 0 0 0			
						(j) 🗔 Edit
			Trigger:		🖷 On path	
			Path:			
			Action type:		Send a standard email	
			Plugin (SDK):			
			Timeout:			
			Cyde:			
			Group:		<none></none>	
					Log execution	
						Configure
Previous 🕤 Next						Save process 📀 Close

GANTT CHART – DISPLAYING DATA WITH HYPERLINKS

The Gantt Chart Web Part allows for graphical data presentation. The new version of the system allows users to click on the given chart element in order to open the form associated with the given task. This makes task viewing more intuitive and less time-consuming.

Easy identification of the DEV/TEST/PROD environment

When working under the regime of the development, testing, and production environment with the export-import mechanism (introduced in version 8.3), correct identification of the environment hosting WEBCON Designer Studio operations is extremely important.

The newest version makes this process much easier by introducing clear and legible information on the environment type in the top right corner of the application.

Process Suite - Desig	ner Studi	D			_ 🗆 ×
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ne					
	– User privi	leges			
	General	Business entity:	WEBCON	Business entity:	WEBCON · ·
	Administrati	on:		,	* *
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Process Suite - Desig	ner Studi	D			_ 🗆 ×
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ne					
WebParts					
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	General	Business entity:	WEBCON	Business entity:	WEBCON 4
	Administrati	on:			*
					20 20

CONFIGURATION SCREEN FOR WEB PARTS SWE AND SWC

The Configuration screen for the Show Workflow Elements and Show Workflow Charts Web Parts has also undergone ergonomic improvement. Right now, all settings are categorized into sections, making the screen clearer and easy to use.

5	Home WEBCON BPS Configuration	
SAVE 🔛 SAVE AND RETURN	S RETURN	
Search Basic filters	Processes: Selected processes	
Standard filters	 Proces zapotrzebowania Purchase Request 	
Filters forced by URL	All Form types	
SQL filters	Workflows:	
Data presentation	All workflows	
Sorting	Steps:	
Grouping	All steps 🗸	
Actions and printing		
Advanced		

CHANGES TO WORDING AND TRANSLATIONS

Due to the ongoing development of the system, its functions and the opinions of our clients and partners, we have decided to review the wording used in Designer Studio. We have made changes with the aim of making the names more understandable and corresponding to the actual state. This is important, especially for those who begin their adventure with WEBCON BPS. The list of changes and appropriate comments is presented below.

WORDING IN VERSION 8.3	WORDING IN VERSION 2016	COMMENT
Document	Workflow instance	The change concerns a single, started workflow and is made to clearly distinguish between the document (file) and individual instance of a (started) workflow
Related documents	Related workflow instance	Change resulting from the one above
Document type	Form type	Since previously document type referred to the type of fields displayed on the form, the name document type is changed to form type
Document subtype	Form subtype	Change resulting from the one above
Related document types	Related form types	Change resulting from the one above
Variables	Constants	Name change of feature introduced in WEBCON BPS 8.3 since it allows for definition of constant values for use in various processes. The values may differ due to the used environment, but do not change dynamically within a single environment.
Attachment attributes	Attachment details	Change made to increase transparency of options included into the Attachment details node.
Action type	Trigger	Change made to increase transparency of configuration. Word "trigger" clearly defines that the purpose of this configuration window is to decide where in the workflow a given action will be executed.
Action kind	Action type	Change made to increase transparency of configuration.
Tags	Variables	In the creation of SQL and JavaScripts with appropriate editors, from now on all values within are called variables. Consequentially, new users find it much easier to understand their functions.