ActiveFlow

User Guide

Release Date: **May 12, 2008**

DISCLAIMER: The names of files, values and reports in this Guide may differ slightly from those in the example files supplied with your software.

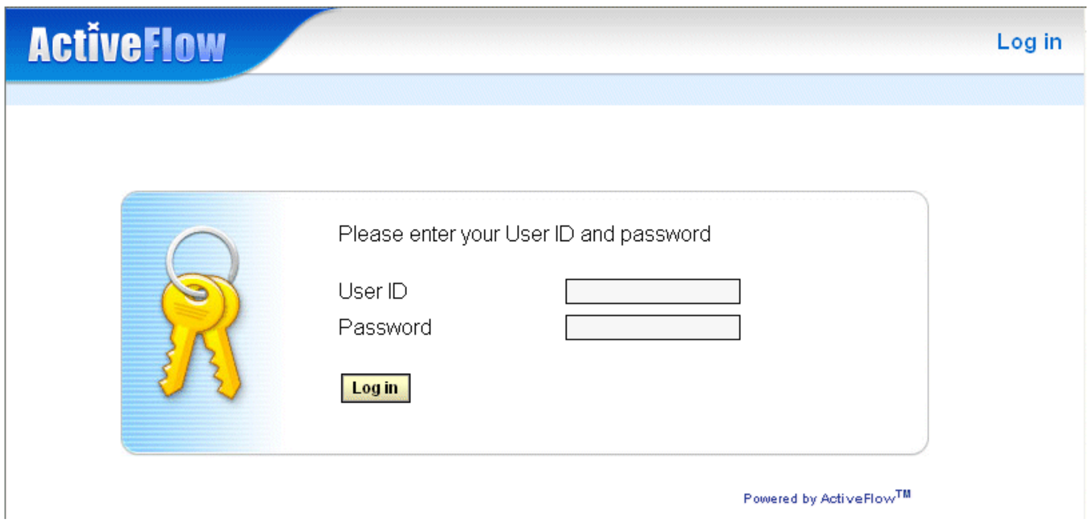
Contents

Workflow actions

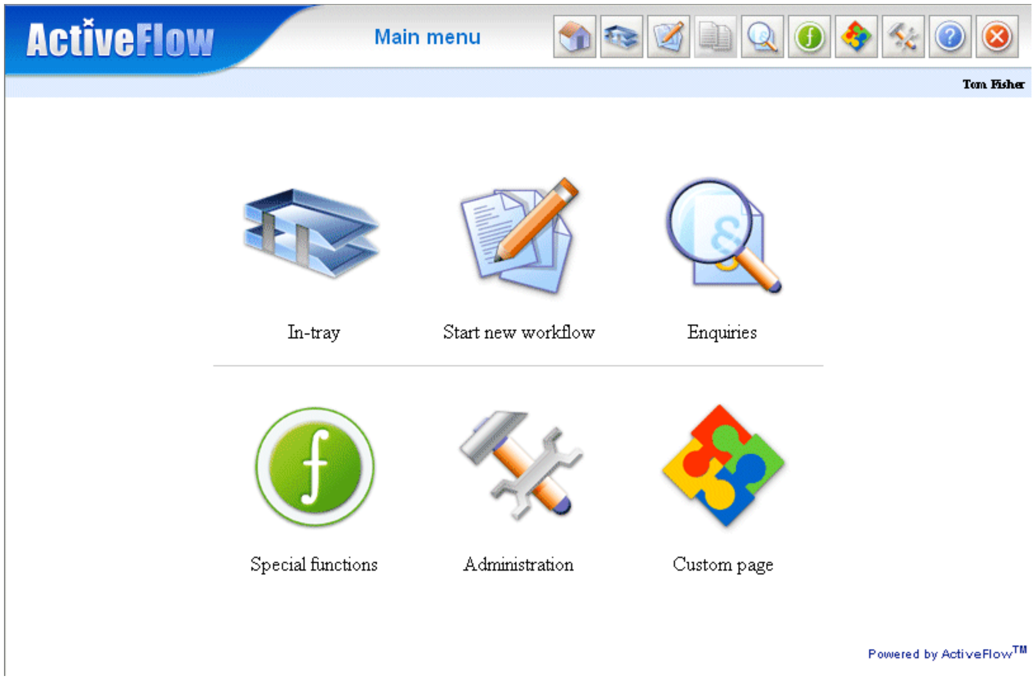
Workflow user guide

Logging in

To log in to the ActiveFlow system, enter your User ID and password as provided by your system administrator.

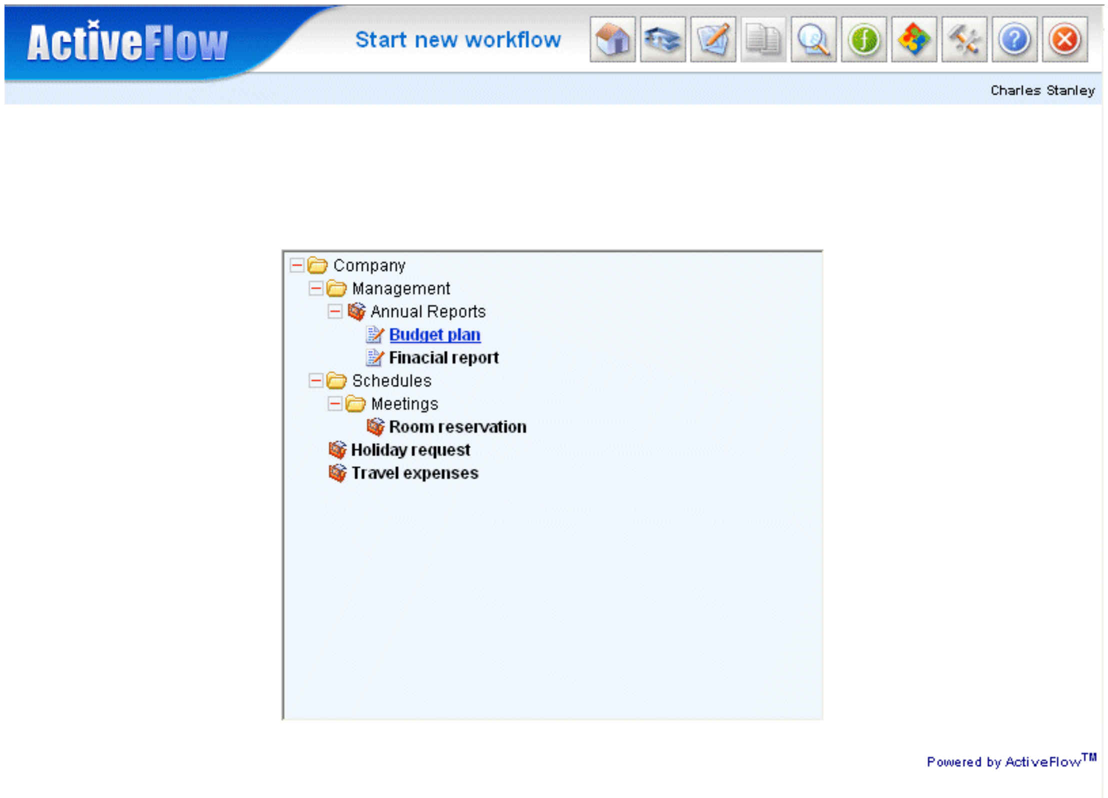


Alternatively, ActiveFlow can be fully integrated to ActiveDirectory to bypass the need for direct login. Whichever method is used to gain access to the system, you will then see the main menu as below:


ActiveFlow
Main menu
Tom Fisher
In-tray
Start new workflow
Enquiries
Special functions
Administration
Custom page
Powered by ActiveFlow™

Start new workflow

To start a new workflow, select the **Start new workflow** option from the large main menu icons or the menu bar icons to the right of the ActiveFlow logo.

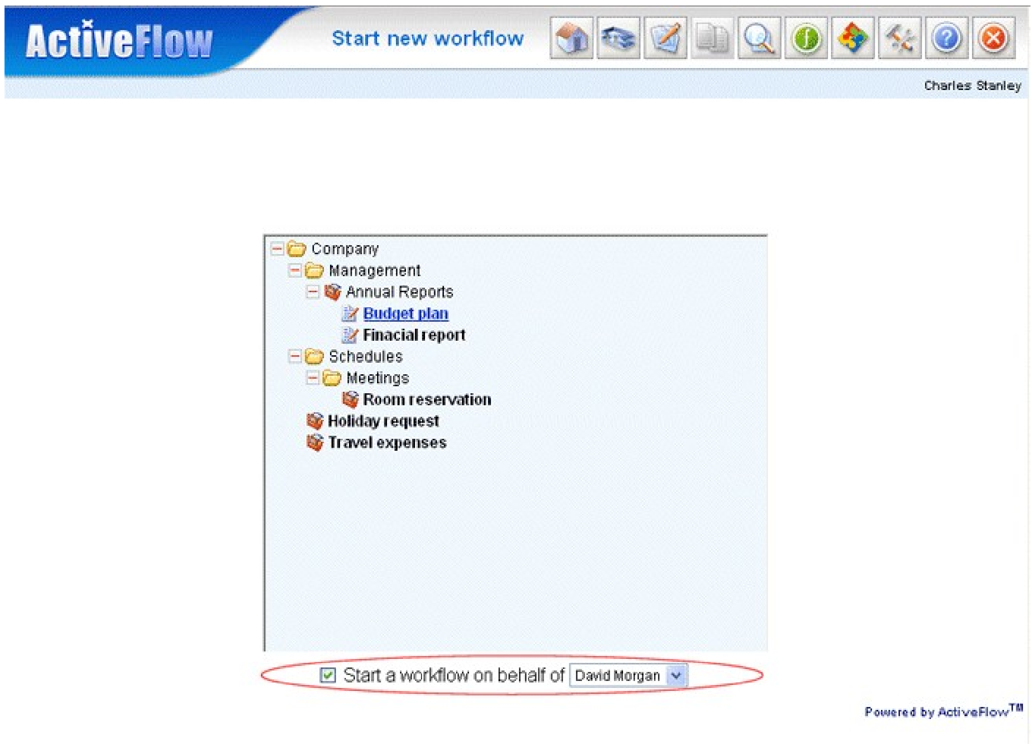


A tree structure of workflows available to you will be shown.Select the appropriate workflow name or the appropriate start form (if the workflow has several start forms) from the tree structure.

Delegate maker

This function allows you to start a workflow on behalf of another user. For instance, a secretary may want to enter the details of a travel expense on behalf of the boss.

To do this, check the checkbox and select the user on whose behalf you want to start the workflow.

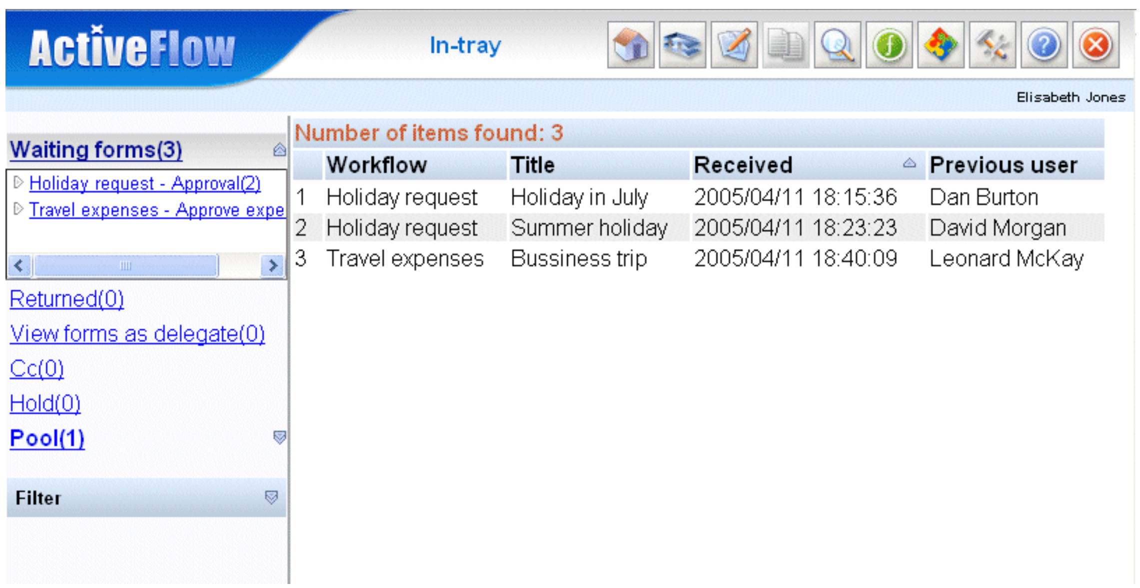


You will have the workflow starting rights of the delegator (remember, you start a workflow on the delegator's behalf). After submitting, the form will be sent to the delegator for checking before traveling on the normal workflow route.

View In-tray workflows

The In-tray shows you all the forms waiting for action by you. There are six types of forms:

- **Waiting** forms sent to you for action
- **Returned** forms sent from the next user in a workflow chain
- **Cc** forms sent to you for information only
- **Delegated** forms (for action). You are acting as a delegate for another user
- **Hold** forms are partially completed forms that you have held for later processing
- **Pooled** forms are forms that can be picked up by you from shared pools of work



On the left side the In-tray page are a list of links, one for each form type. Each link contains the type of the form and the number of forms received. If there are forms waiting, the link of the corresponding type is displayed bold. If there are no forms waiting in the pool the **Pool** link is hidden.

On the right side of the In-tray page the corresponding list of received forms is displayed. The following information is displayed in this list:

Workflow	The type of workflow. The workflow name is the same as the one displayed in the **Start New Workflow** page
Title	The title of the form given by the maker of the form. If no title was given, the text : "Form sent by: *previous user*" is displayed
Received	The date when the form was received or held
Previous user	The name of the user that sent the form to you

Notes:

For some type of forms the information displayed may differ. Please see below the description of each form type.

The listed information can be reorder ascending or descending by priority, workflow name, title and date by clicking on the header of the table with the same name. For reorder by priority you should click on the header of the first column.

Opening a form

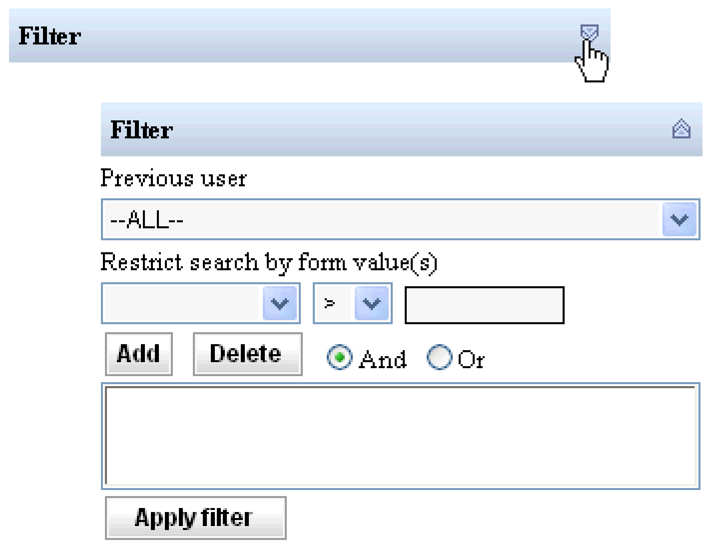
- First you should select the category of form you want to open by clicking a link from the left side of the In-tray page. On the right side is displayed a list of all received forms of the selected type. By default, at page loading, a list of all forms of the Waiting type is displayed.
- For Waiting and Pooled types of forms you can display only the received forms of one type by clicking the left hand link to expandable the list of forms grouped by workflow and activity. To expand/collapse the sublist you should click on the double arrow icon at the right side of the type's link.
- If you want to further restrict the list of forms currently displayed, you can filter the list by the following criteria:
  - previous user
  - form field value

  The "previous user" filter is available for the waiting, returned, delegate and cc type of forms. The "form field value" filter is available only for waiting and pool type forms. For example, you can specify a condition like: "Display all the *Travel expense - Approve expenses* forms which have the total amount greater than 250 USD and has *Leonard McKey* as previous user"
- To open a form, simply click on one of the items selected

Filtering the list of forms

To use the filter:

- First, expand the **Filter** area as below:



- Select the filter criteria.
- Then press the **Apply filter** button.

Waiting forms

Waiting forms are forms received by a user for review as part of the normal process flow.

You may select either to view all the received forms or only the forms of one activity. The list of forms displayed can be filtered by previous user and field value. The field value criteria is available for filtering **only** if you specifically select just one activity from the expandable list of links and the form is specially designed to be searched by value.

If you select to view only forms received for one activity the workflow name column is not displayed. If a particular form is designed to display special values, then the corresponding form values will be displayed in the list of forms. Also, if bulk approval is enabled for selected activity many forms can be approved at one time.

If the previous approver of a form was a delegate, **(d)** will added after the **Previous user name** in the display.

Returned forms

If a form is designed to allow return actions a user can send back that form to a previous user in the workflow chain. A returned form is a form sent back to you by a next user in the workflow chain.

Returned forms can be of 2 types : returned to the maker or returned to the previous approver. The first category will also have a **Delete** button set in list of workflows; which allows the maker to delete them.
Note: Only the maker has the right to delete a form he/she issued. For other types of returned forms, the **Delete** button will be disabled.

The list of returned forms can be filtered only by previous user name.

Delegate forms

One or more users may set you as a delegate and you will be able to see the In-tray of the user(s) who set you as delegate and you can perform the same actions as the delegator. A delegate form is a form from the In-tray of one of the users who sets you as an active delegate.

Note:

You cannot view the hold and pool form types from the delegator's In-tray

For the Delegate type of form, a new column **Delegator** is displayed in the list of forms and it contains the name of the user who set you as delegate.

The list of delegate forms can be filtered only by previous user name.

Cc forms

A Cc form is a form sent to you only for information and you can only view the content of the form. A **Delete** button is displayed in the list of the forms for deleting the form from the In-tray

The list of Cc forms can be filtered only by previous user name.

Hold forms

Sometimes you partially complete a form and want to save the form in order to finish it later. A form allows this save action only if the workflow designer inserted a hold button in the form. A hold form is a form saved for later review. You may hold the same form as many times as you need to.

Forms held by the maker will also have a **Delete** button which allows the maker to delete them.

The list of hold forms cannot be filtered by any criteria.

Pool forms

A pool form is a form that is not directly assigned to you and you should select it from a pool of work. This will be part of your job description.

You may select either to view the forms from all the pools accessible by you or only the forms from one specific pool. The list of forms displayed can be filtered by field values only. The field value criteria is available only if you specifically select one activity from the expandable list of links and the workflow designer associated special fields for search with that activity.

If you select to view only forms received for one activity the workflow name column is not displayed. If the workflow designer associated special fields with that activity, then the corresponding form values will be displayed in the list of forms. Also if the bulk approve is enabled for a selected activity, many forms can be approved at one time.

Note:

If a work item comes from a workflow pool, when an user returns an item to the previous user, the work item will be put back into the pool. Work items returned to the pool will be displayed with a different color.

Form action

This section describes the actions you can perform on a form. According to the workflow business logic, some of the actions described below may not be available for all forms. Please consult the company workflow designer about availability of these functions for each workflow.

Approve

For approving a workflow, press the appropriate button. Some workflows are submitted also by pressing ENTER. If you are the last approver in the chain, then the workflow is finally approved and archived and nobody can perform any more actions on it.

Hold

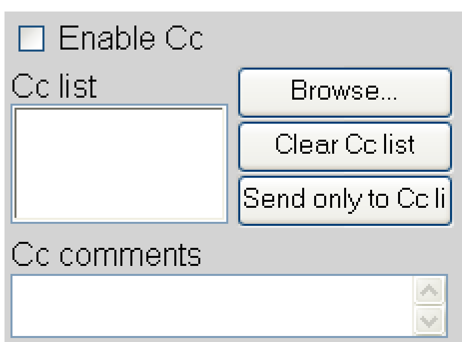
If you partially filled a workflow form and you do not want to submit it but to put aside in order to finish it later, then you can use the **Hold** button.
You can view the held jobs by selecting the appropriate link from the In-tray page. Each form can be actioned (e.g. returned, rejected or approved), or the form can be held again for later review and action. There is no limit to this view/hold scenario.

Important:

If you action as a delegate and press the Hold button, the form will be put in the delegator's hold In-tray. You do not have access to the delegator's hold In-tray.

Cc

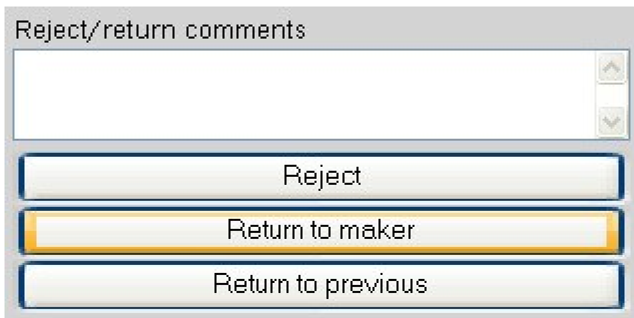
You can send a copy of the form to a list of users as a means of passing information. In the form, look for the construction below:



Use the **Browse...** button for selecting the users in the Cc list. The **Clear Cc list** button will remove all the users from the list. Use the **Enable Cc** checkbox for enabling/disabling the Cc functionality.
If you do not want to action a form but at first to send the form to the users in the Cc list, then before submitting a form, you can use the **Send only to Cc list** button to send the form to the users on the Cc list. In this case, you may re-open the form later for action.

Return to maker

If you want to return the form to the maker (e.g. for correction), use the appropriate button in the form.



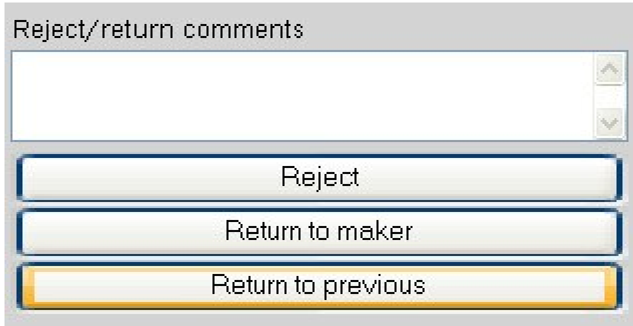
If the workflow has several possible makers, the form will be sent back to all of them.
If the workflow was started by a delegate maker, the delegate maker will receive the returned form.

Note:

- When returning the form, you have to enter the reason for returning it.
- All the users involved in the returned workflow will be notified by e-mail about this action.

Return to previous

In the case of return to previous (e.g. for correction), the form is sent back to all the source users. The source users may resubmit the form or return it.

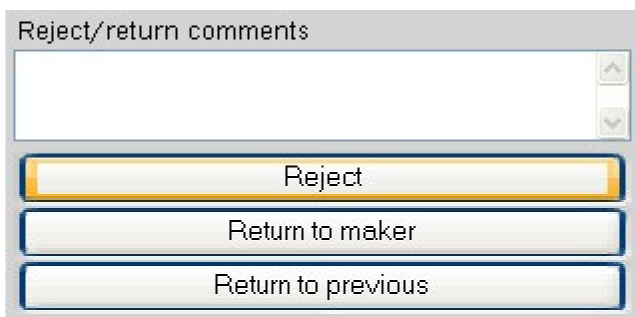


Note:

- When returning the form, you have to enter the reason for returning it.
- All the users involved in the returned workflow will be notified by e-mail about this action.

Reject

Rejecting a workflow means that it will be rejected and archived and nobody can perform any more actions on it.



Note:

- When rejecting the form, you have to enter the reason for rejecting it.
- All the users involved in the rejected workflow will be notified by e-mail about this action.

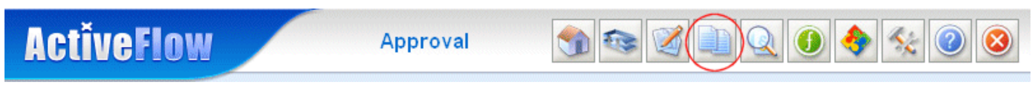
Copy form

It is often useful to refer back to a previous workflow and copy the contents into a new workflow. This to both save time and often to refer back and use previous data.
The copy function copies data in a form (either in-flight or completed) to a new workflow of the same type.

Examples of this useful function could be:

- With frequent trips to the same place, it is useful to copy the same travel information and expenses (with maybe some small revisions).
- Annual yearly maintenance purchase request. In this case it is useful to refer back to last year's details.

In order to start a new workflow using values from a previously sent workflow, you must press the Copy button from the toolbar.



Note:

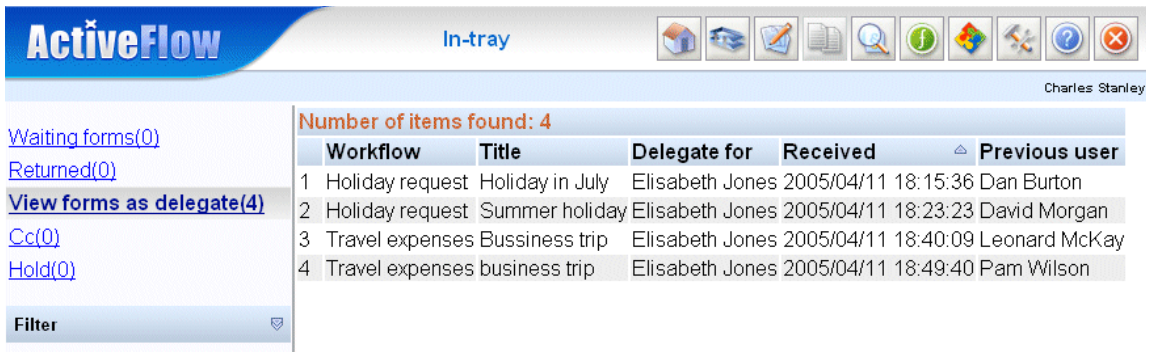
The copy button is enabled only when a previously made form is opened

Important:

If a workflow has 2 start activities which merge in an AND-Join (illegal but tolerated map) the copy form functionality will have unpredictable results.

Delegate action

A user may set you as a delegate and in this case you will be able to see the delegator's In-tray and you can do the same actions (approve, return, reject etc) to the forms as the original user can. You can view the forms sent to you in a delegate capacity by selecting the appropriate link from the **In-tray** page. The form types (normal and returned forms) can be distinguished by their different background colours.



	Workflow	Title	Delegate for	Received	Previous user
1	Holiday request	Holiday in July	Elisabeth Jones	2005/04/11 18:15:36	Dan Burton
2	Holiday request	Summer holiday	Elisabeth Jones	2005/04/11 18:23:23	David Morgan
3	Travel expenses	Bussiness trip	Elisabeth Jones	2005/04/11 18:40:09	Leonard McKay
4	Travel expenses	business trip	Elisabeth Jones	2005/04/11 18:49:40	Pam Wilson

If you action a form as delegate, the users who receive the form see the original user name with **(d)** next to it, to show it has been acted on by a delegate. A user sees that the work was delegated but not the name of the delegate.

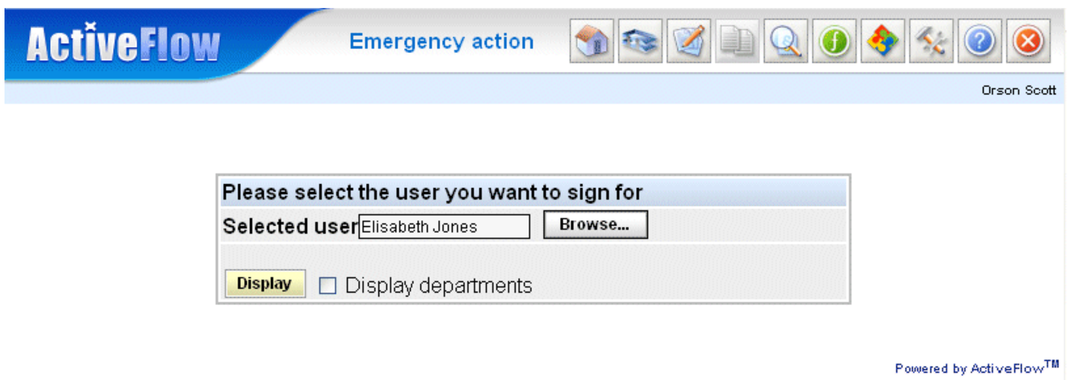
The delegator is notified by e-mail about all actions taken by a delegate, so he will know what action was taken on all forms (approved/ returned/ rejected/ finally approved).

Emergency action

An emergency action is taken when a form must be checked (approved/ returned/ rejected) urgently and the usual person is absent and did not set a delegate. In this case, a person with a higher position in the company, from the same sub-department or above, may see the absent user's In-tray.

This functionality can be selected from the **Special functions** page.

The **Emergency action** page will display a hierarchy of selectable users (users with a lower position in the company structure and from the same department). After the emergency checker selects a user, both normal and returned forms (but with different background colours) that are destined for the selected user are shown.



If you have the emergency action rights described above, you can select a form for emergency action by clicking on the appropriate row. The form will be shown and you may approve, return, or reject it. The user(s) who receives a form sent by an emergency checker will sees a **(d)** next to the name of the previous user.

The original user is notified by e-mail about this action.

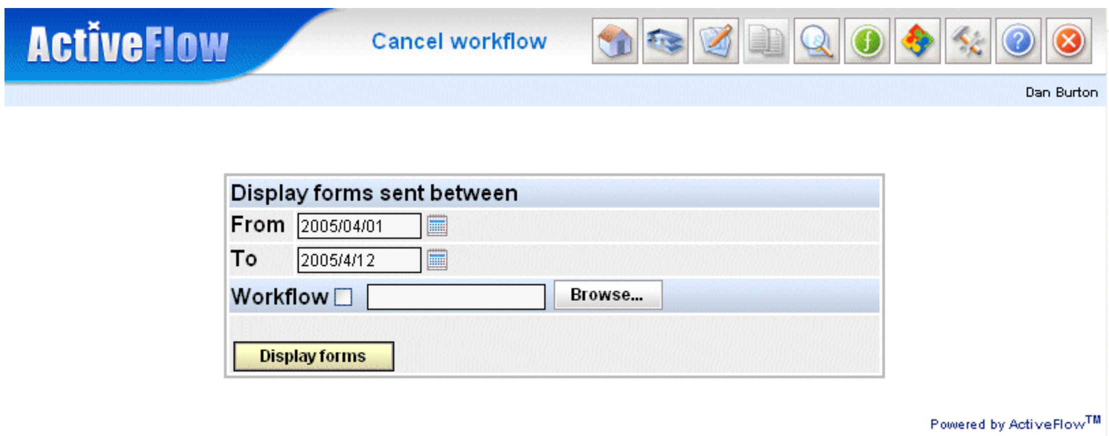
Cancel a workflow

You may cancel a workflow that has been issued by you. The steps are as follows:

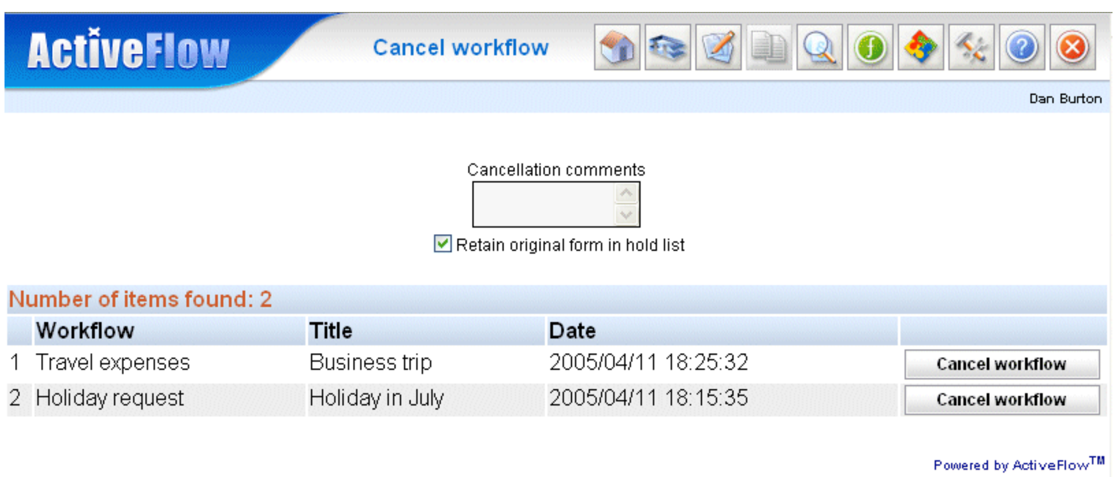
- Set the criteria for displaying maker forms. The following selection criteria are available:
  - Date the form was submitted
  - Workflow
- From the list of forms that match the above criteria, select the form to cancel; you must also enter the cancellation comments.

Note:

A form cannot be cancelled if the comments field is empty.



The title, workflow, and date of submission of each form is displayed.



You may choose if the form is to be held in the hold list in its original state (with data from submission time) for later re-issue. For this, you must check the appropriate checkbox. Also you may see the contents of the form that was clicking on the appropriate row.

Before ActiveFlow cancels a form, a confirmation message is displayed. After cancellation, an e-mail is sent to all users who approved the form or have the form waiting in their In-tray.

Enquiries

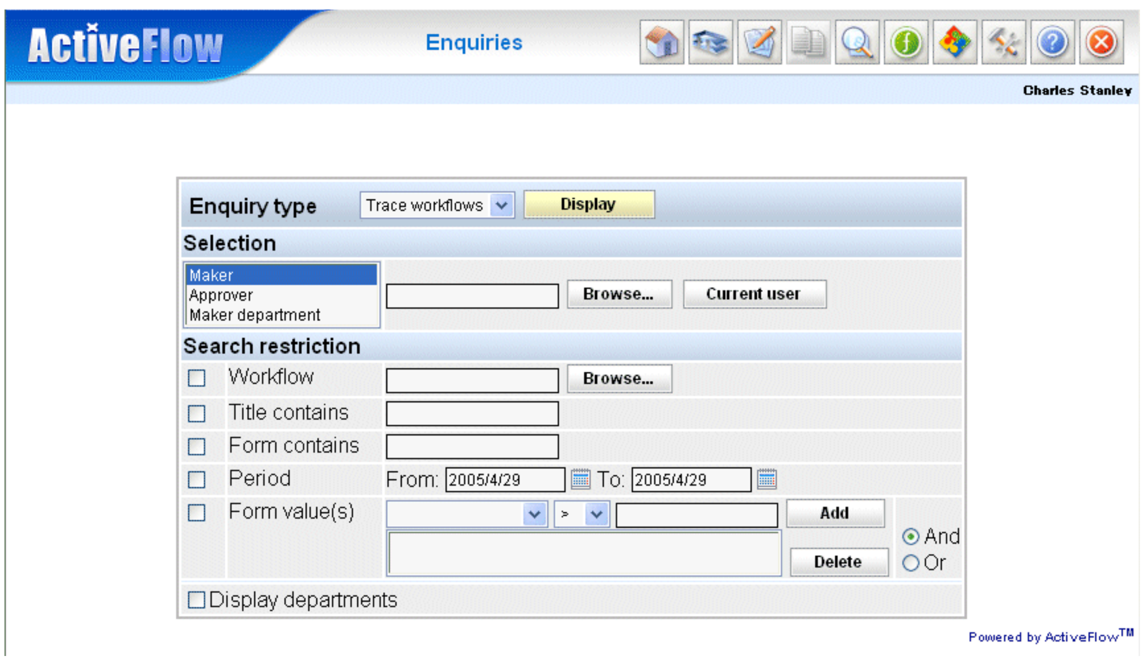
ActiveFlow enables you to search for work items in the following ways:

1. Trace workflows
2. Waiting
3. Pending
4. Finally approved
5. Rejected
6. Special view

The same search page is used for all of them. The search page allows you to search by:

- Maker department
- Approver department
- Maker name
- Approver name.

The picture below shows the search page.

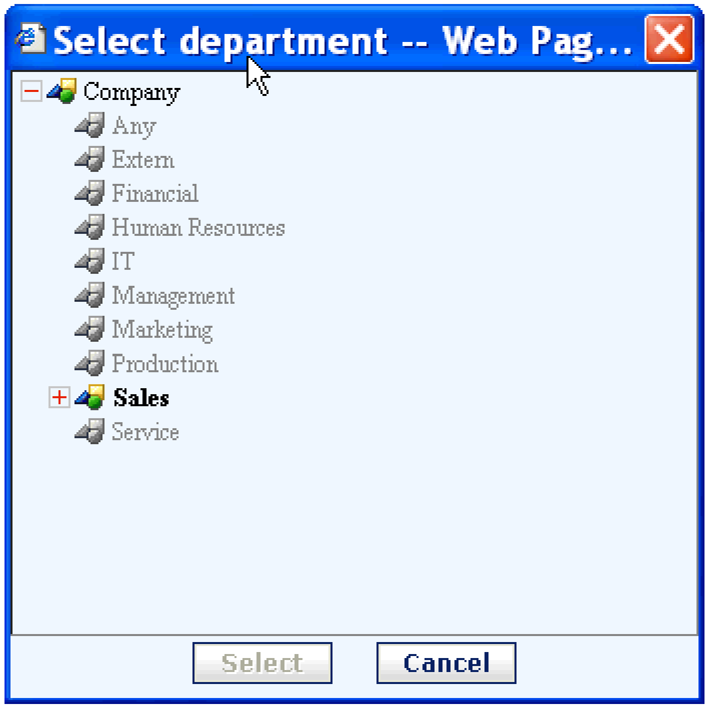


Use the **Browse** buttons to select a department or a user according to the following rules:

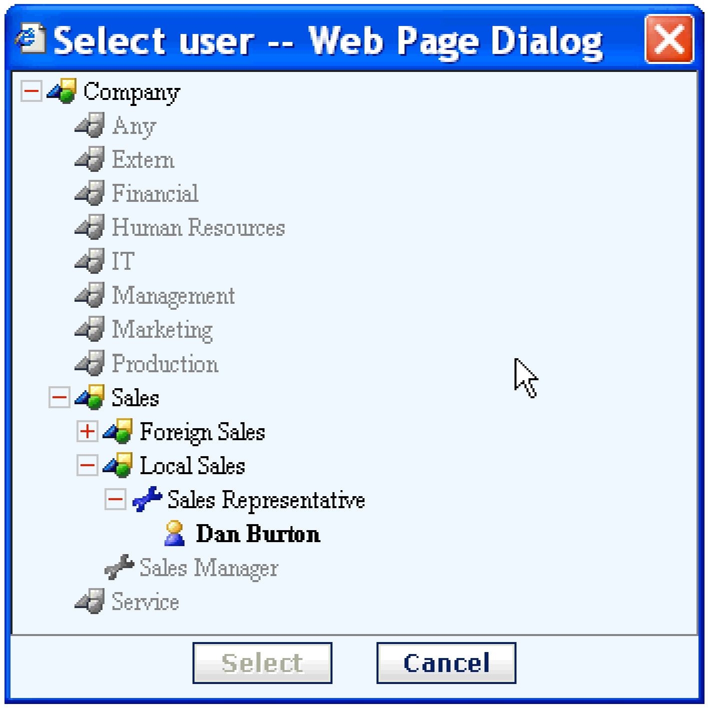
- In the **Select department** dialog, you can select any of the departments and sub-departments to which you belong.

- In the **Select user** dialog, you can select any user from your own department who is lower in the organizational hierarchy.

The **Select department** dialog displays the entire organization structure, but departments you cannot select are dimmed.



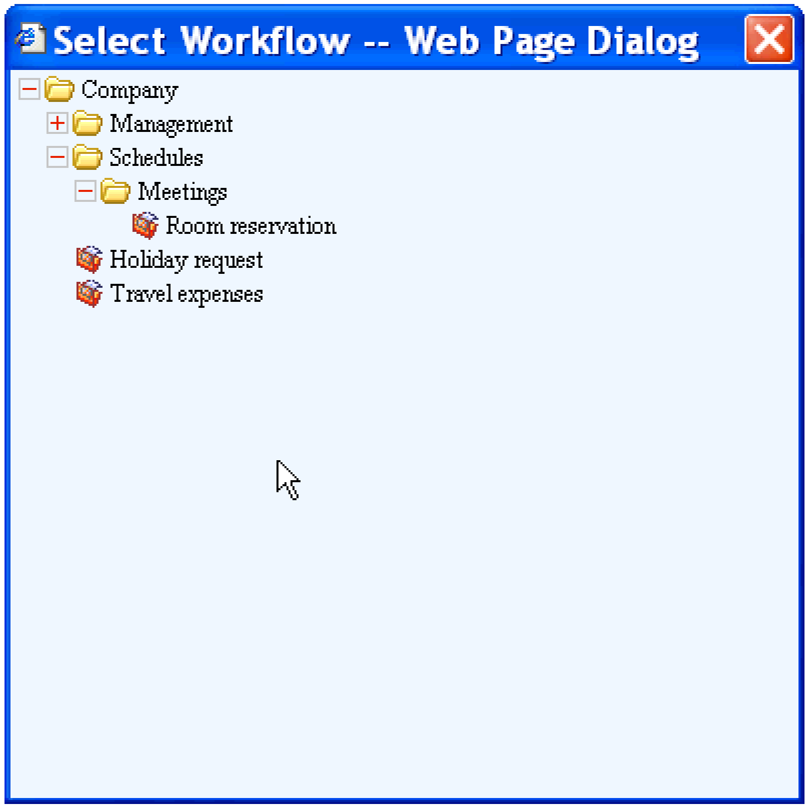
The picture below displays the **Select user** dialog.



You can also limit the search by selecting and specifying the following items:

- Workflow
- Form title
- Form contents
- Period
- Special field value

To activate those restrictions, you have to select the appropriate checkbox. If you want to view only forms in a specific **workflow** press the **Browse** button and select the appropriate workflow:



You can restrict the search by using the **Title** search restriction. In this case the results will contain only forms which contain the specified word in the title.

Form contains restriction is available if the database supports full-text search functionality (SQL Server 2000 or above). Use this functionality if you want to find all the forms which contain a specified word. Note that if you are using this option the query might take longer to process.

Period restriction will be considered according to the selected criteria:

- If selected **by maker department** or **maker name**, all forms made (started) in that period wil be displayed.
- If selected **by approver department or approver name**, all forms that entered the In-tray (for waiting and pending forms) and forms that were finally approved or rejected in that period will be displayed.

Search by form value functionality can be activated by selecting the appropriate check box. Before using this search criteria, you must select a workflow as it makes sense to search by value only for certain types of workflow (the *Total* field in one workflow may have a different meaning and maybe a different range of values from the *Total* field in another workflow).

After selecting a workflow, the list of available searchable fields will be automatically displayed in the appropriate drop-down list box.

You must select the desired search field, the comparison operator and the value. By pressing the **Add** button, the new condition will be added to the list of search conditions. The logical operator which links the search conditions may be changed using the appropriate radio buttons.
If you press the **Delete** button, the current selected search condition will be deleted.

Note:

For in-flight workflows, according to the selected criteria (by maker or approver), the input values will be checked against the values sent by maker or approver. For archived workflows, the values will be checked against the archived forms.

Display rules

If you selected **by maker department** as the search criteria, all forms in the selected department that were made by users who have a lower hierarchy level than you will be displayed. If the search criteria is **by approver department** , the display is of all forms in the selected department that are waiting, finally approved or rejected or are pending (according to the enquiry type) for users who have a lower hierarchy level than your hierarchy level.

A check box enables/disables displaying the department name for each user on the results page.

Note:

Enabling the check box makes the search a little slower as more data has to be processed.

In the case of pending forms, the maker department and name are not available (the radio-buttons are dimmed) because this enquiry is from the approver's point of view: "I want to see (for Mr. X or Department X) which forms are pending and which of the previous users sent the form forward".

Each page of the enquiry has up to10 items, a **Next page** button, and a **Previous page** button.

Trace workflow

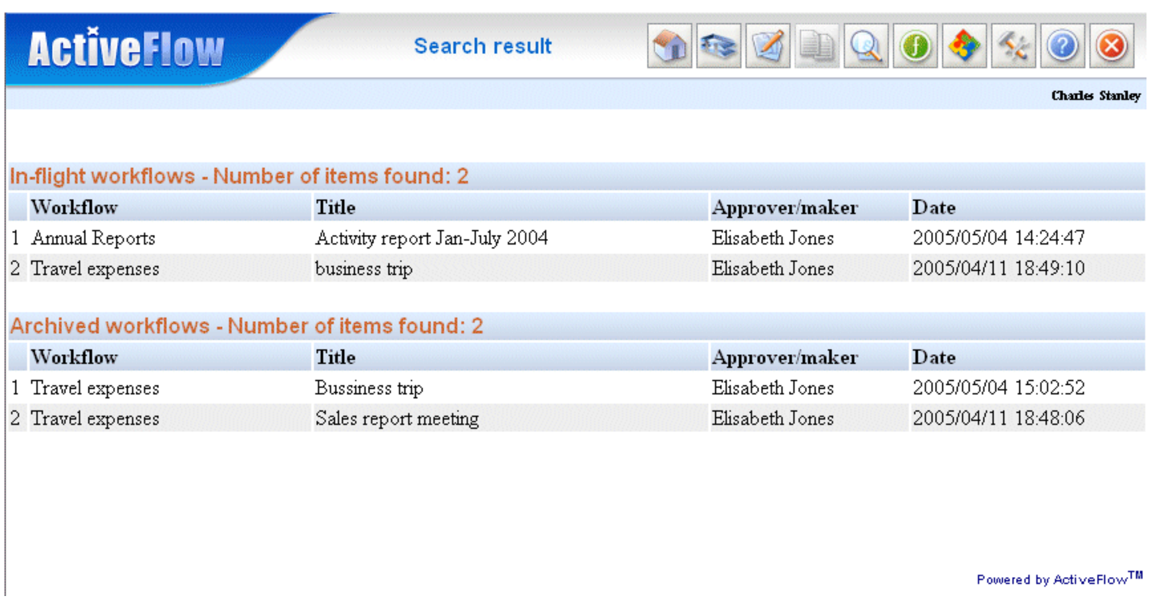
The Trace workflow function allows you to view the list of the approvers who have already handled a specified form.
In the case of Trace workflow, the search criteria "by approver department" is disabled because usually in the case of bubble up, all the users in bubble-up chain are in the same department so all of them are approvers and the enquiry will display multiple entries for the same flow.
You may select as search criteria only departments you belong to in the case of search by maker department and only users with lower hierarchy level from the same department in the case of search by maker or approver. By using the "Current user" buttons you may select yourself as a search condition. As in the case of the other enquiries, the search result may be restricted by specifying the workflow, form title and/or the time period.

The Trace workflow function returns first the list of in-flight workflows followed by the list of archived workflows. Each item displays the following information:

- Workflow name
- Flow title
- Maker or approver name (according to the search criteria)
- Date when the form was issued/approved

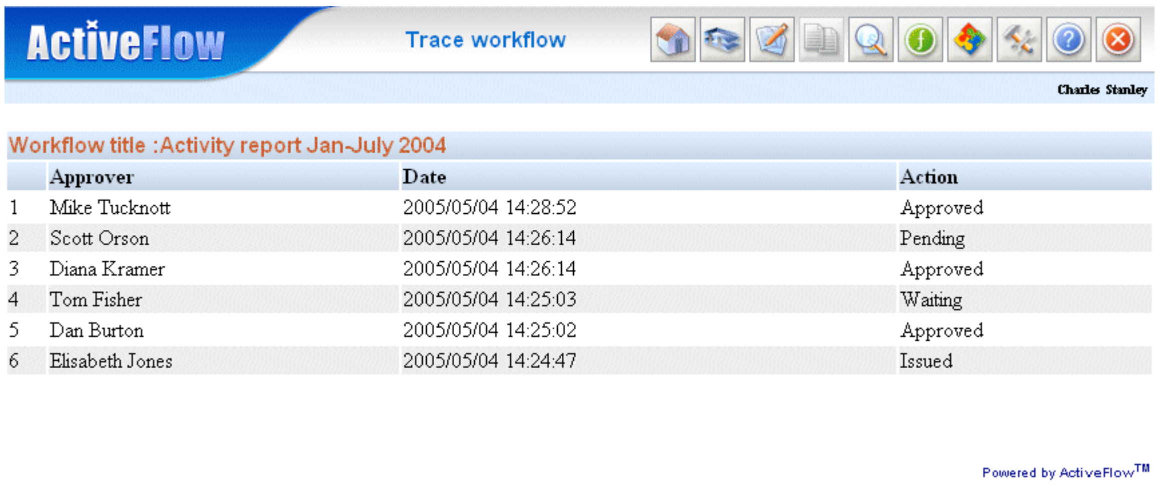
It is important to understand that the search criteria applies to both types of workflows : in-flight and archived. So, you can't specify a search criteria like : all the in-flight workflows issued by me and all archived workflows issued by me in a certain period.

You can view the list of approvers for an item by clicking on the item line.



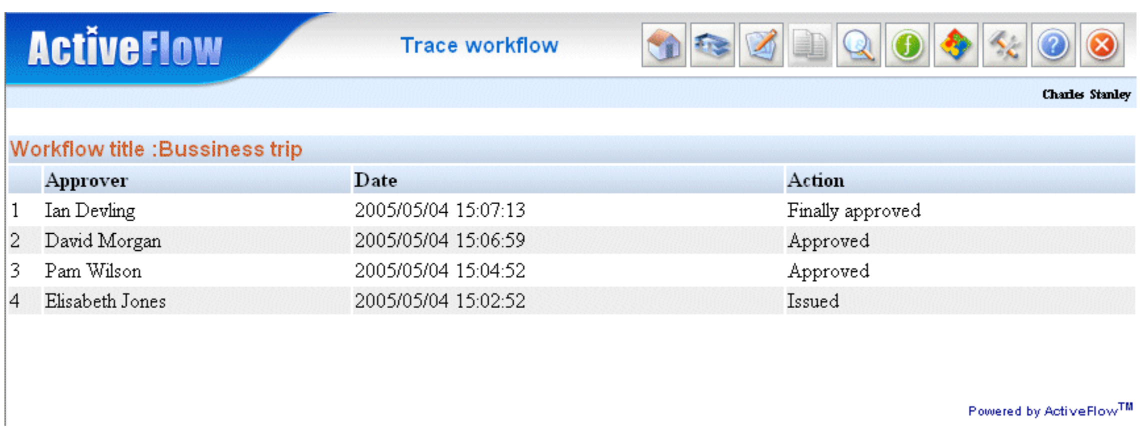
For in-flight workflows, for each user the status of form (issued, waiting, pending, approved or returned) is displayed. In the case of archived workflows, the actions can be : finally archived, rejected, approved, returned or issued. Also, it is possible to see (in read-only mode) the contents of the form at that stage *(the submitted data and not the received data)*.

The picture below shows the list of approvers for an in-flight workflow.



	Approver	Date	Action
1	Mike Tucknott	2005/05/04 14:28:52	Approved
2	Scott Orson	2005/05/04 14:26:14	Pending
3	Diana Kramer	2005/05/04 14:26:14	Approved
4	Tom Fisher	2005/05/04 14:25:03	Waiting
5	Dan Burton	2005/05/04 14:25:02	Approved
6	Elisabeth Jones	2005/05/04 14:24:47	Issued

In the case of archived workflows, the same information is displayed. The only difference is that in this case only the final status of the form is visible as only the final status of the workflow is archived.



	Approver	Date	Action
1	Ian Devling	2005/05/04 15:07:13	Finally approved
2	David Morgan	2005/05/04 15:06:59	Approved
3	Pam Wilson	2005/05/04 15:04:52	Approved
4	Elisabeth Jones	2005/05/04 15:02:52	Issued

Waiting forms

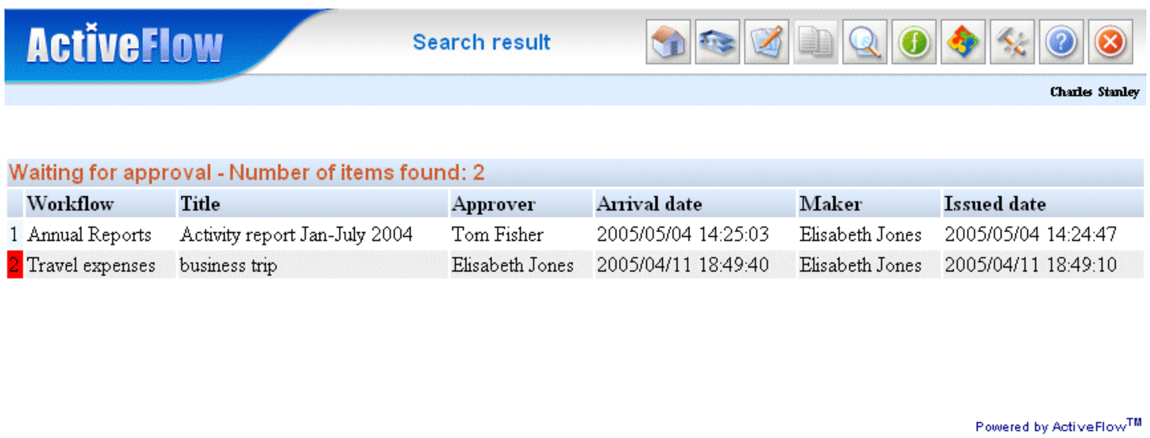
Selecting this item displays all waiting forms in the system, according to the selected search criteria.

The following information is displayed:

- Workflow name
- Form title
- Approver name (Last name and First name)
- Date when form entered the approver's In-tray
- Maker name (Last name and First name)
- Date when the maker made the form.

If, on the **Select search criteria** page, you checked the **Display departments** box, the department name will appear in brackets next to the approver and maker's names. If a user belongs to more than one department, the first department found will be displayed.

The enquiry displays returned jobs with different a color.



	Workflow	Title	Approver	Arrival date	Maker	Issued date
1	Annual Reports	Activity report Jan-July 2004	Tom Fisher	2005/05/04 14:25:03	Elisabeth Jones	2005/05/04 14:24:47
2	Travel expenses	business trip	Elisabeth Jones	2005/04/11 18:49:40	Elisabeth Jones	2005/04/11 18:49:10

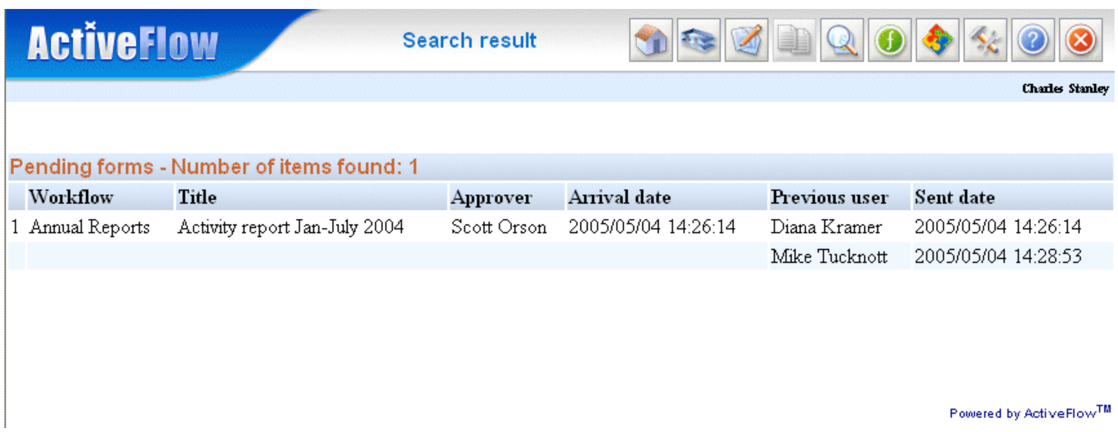
Pending forms

Selecting this item displays all pending forms in the system, according to the selected search criteria.

The following information is displayed:

- Workflow name
- Form title
- Approver name (Last name and First name)
- Date when form entered the approver's In-tray
- Previous user's name (Last name and First name)
- Date when the previous user sent the form.

If, on the **Select search criteria** page, you checked the **Display departments** box, the department name will appear in brackets next to the approver and previous user's names. If a user belongs to more than one department, the first department found will be displayed.

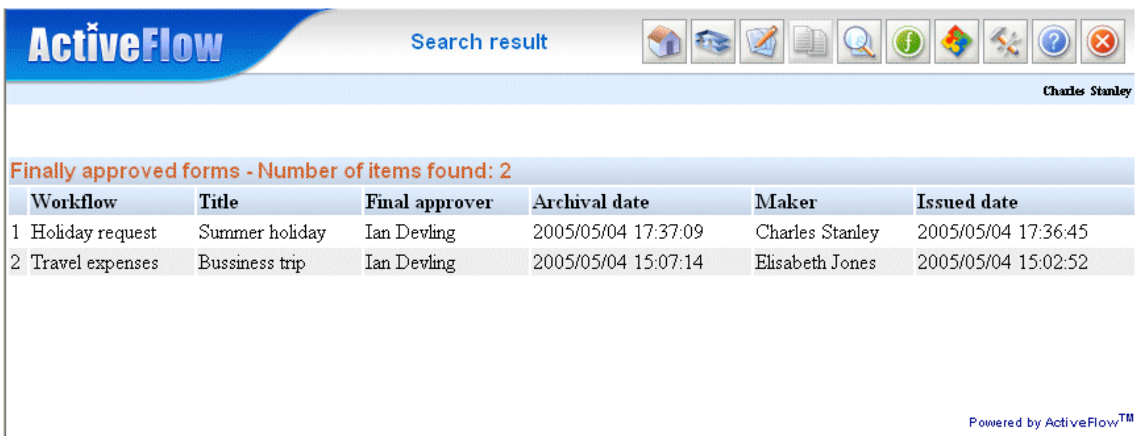


Finally approved forms

Selecting this item displays all finally approved forms in the system, according to the selected search criteria. You can also view the contents of the forms (in read-only mode) by clicking on the item row.
The following information is displayed:

- Workflow name
- Form title
- Approver name (Last name and First name)
- Date when the form was finally approved
- Maker name (Last name and First name)
- Date when the maker made the form.

If, on the **Select search criteria** page, you checked the **Display departments** box, the department name will appear in brackets next to the approver and previous user's names. If a user belongs to more than one department, the first department found will be displayed.



Rejected forms

Selecting this item displays all rejected forms in the system, according to the selected search criteria. You can also view the contents of the forms (in read-only mode) by clicking on the item row.

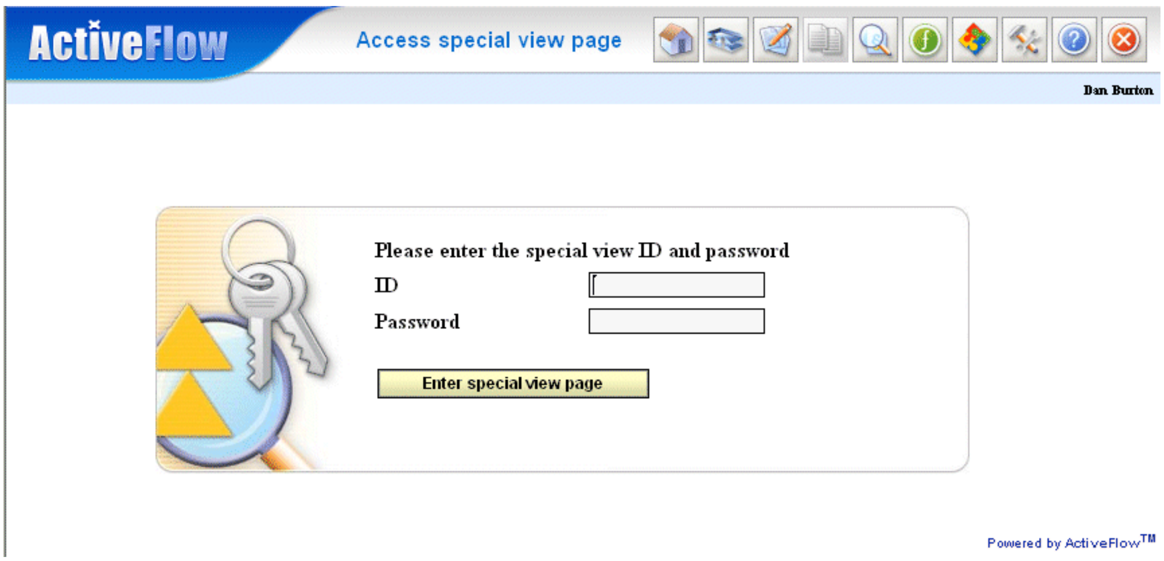
The following information is displayed:

- Workflow name
- Form title
- Rejecter name (Last name and First name)
- Date when the form was finally approved
- Maker name (Last name and First name)
- Date when the maker made the form.

If, on the **Select search criteria** page, you checked the **Display departments** box, the department name will appear in brackets next to the rejecter and maker's names. If a user belongs to more than one department, the first department found will be displayed.

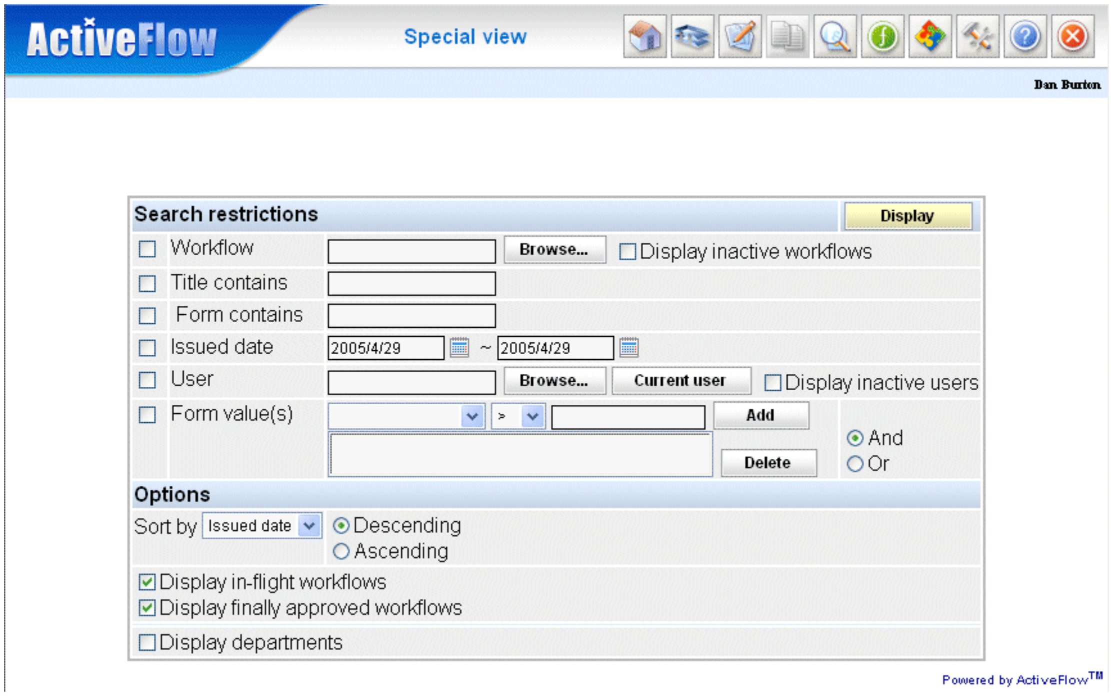
Special view

The special view page allows users with certain privileges to search and view workflows regardless of their hierarchy or position in the company structure. If you want to access the special view page you must enter the ID and password and if successful, you can search and view any workflow in the group associated with the ID. The special view page is accessible from **Special functions** menu page.



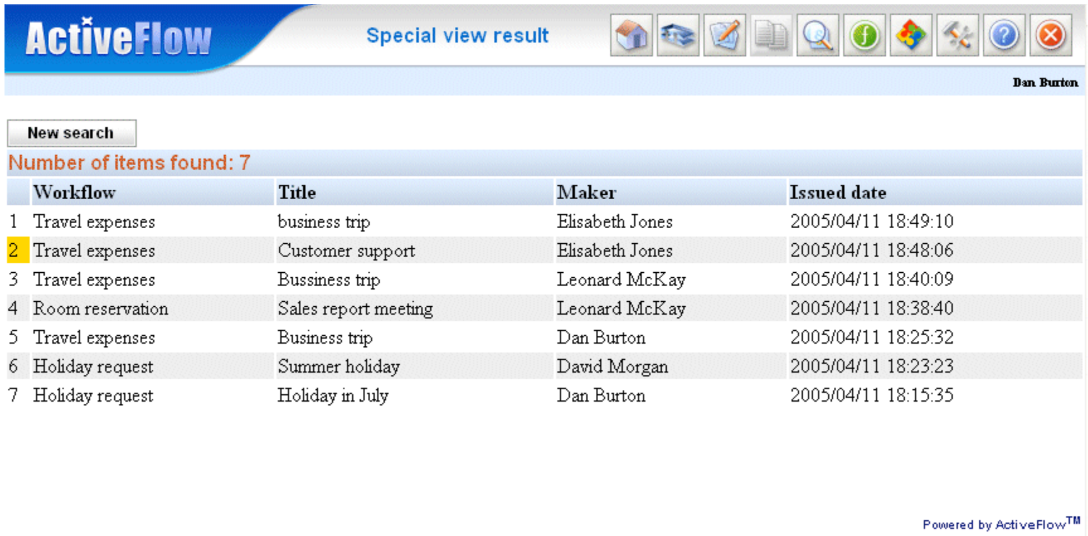
If the access to special view page is granted, you may select the search criteria as below:

The *Search restrictions* section allows you to refine the search in order to examine certain workflows. The restrictions are as follows:



Workflow - pressing the associated **Browse** button, you may specify a workflow from the group of workflows associated with the ID entered at special view login time. If no workflow is selected, then the results will contain only workflows from the group of workflows associated with the ID entered at special view login time.
Title - only workflows whose title contains the text entered in the Title field will be displayed.
Form contains - only workflows that contain the text entered in the "form contains" field will be displayed. This option is available only if the database supports full-text search (SQL Server 2000 or above). Please note that if you are using this option the query might take longer to process.
Issued date - checking the appropriate checkbox, the results will contain only workflows issued in the specified interval.
User - a user specified in this field means that the results will contain only workflows issued, approved, returned, rejected by this user.
Form value - this search restriction is identical with the one from the enquiry page, the only difference is that it refers to the values submitted by the maker.

The **Options** section allows you to specify the order of the results and also the type of workflows which are to be included in the result page.



	Workflow	Title	Maker	Issued date
1	Travel expenses	business trip	Elisabeth Jones	2005/04/11 18:49:10
2	Travel expenses	Customer support	Elisabeth Jones	2005/04/11 18:48:06
3	Travel expenses	Bussiness trip	Leonard McKay	2005/04/11 18:40:09
4	Room reservation	Sales report meeting	Leonard McKay	2005/04/11 18:38:40
5	Travel expenses	Business trip	Dan Burton	2005/04/11 18:25:32
6	Holiday request	Summer holiday	David Morgan	2005/04/11 18:23:23
7	Holiday request	Holiday in July	Dan Burton	2005/04/11 18:15:35

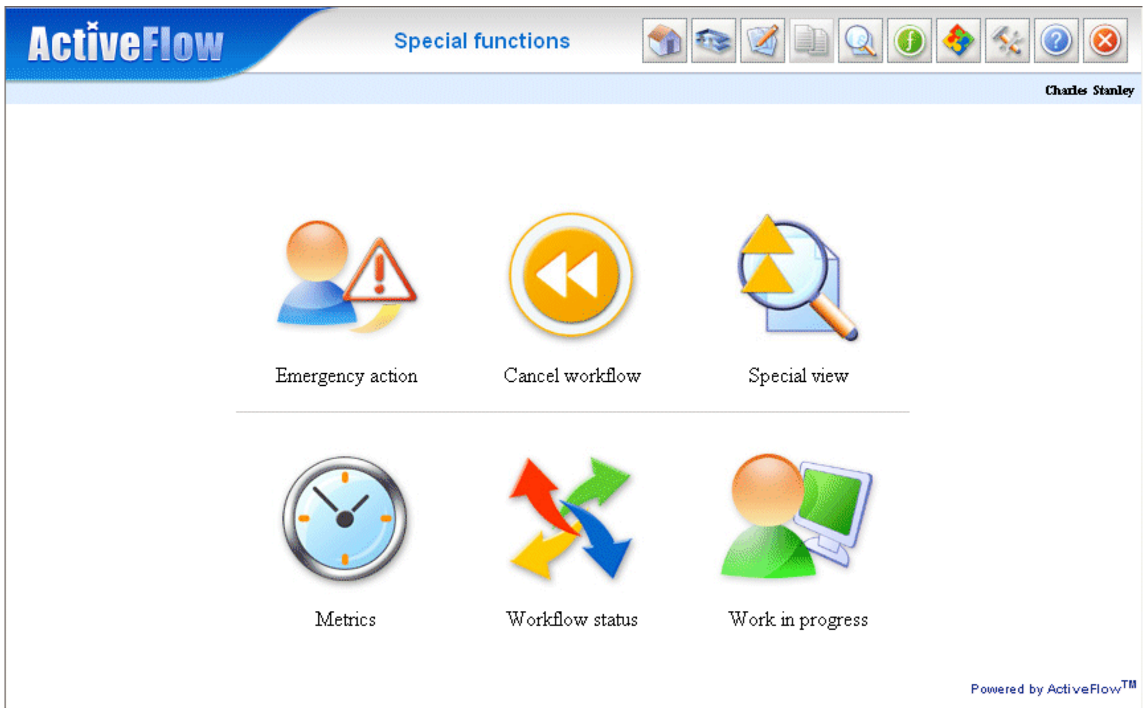
The result page displays the following items:

- Workflow
- Title
- Maker name (if Display departments checkbox was selected, the user's department will be displayed also)
- Issued date

In order to distinguish between the in-flight and archived workflows, they have a different background color (the archived ones have yellow background).
If you press on the item row, the trace of that workflow will be displayed.

Statistics

ActiveFlow offers a very flexible tool for statistical analysis of transactions stored in the ActiveFlow system. These enquiries are available in the **Special functions** menu of ActiveFlow.



Note: Only users with admin rights have access to these enquiries.

Metrics

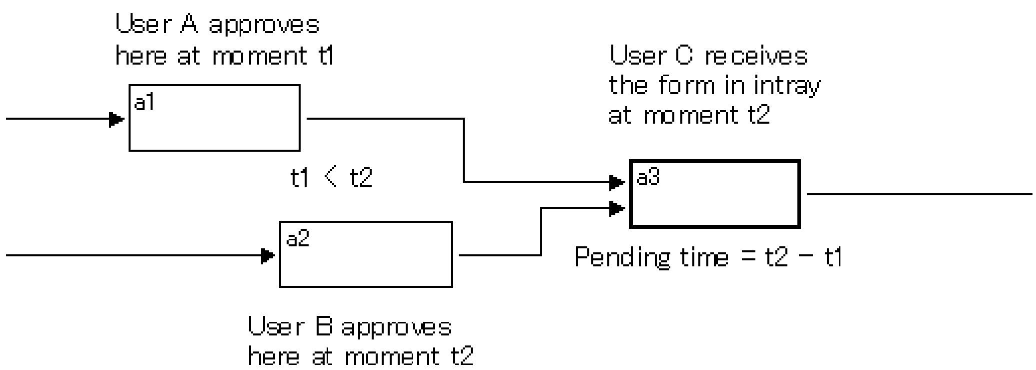
Select **Metrics** from the **Special functions** page and the **Metrics** screen will be shown.

- Enquiry formats
- Input filters
- Displaying an enquiry
- Displaying a chart
- Sorting results
- Saving favorite enquiry settings

Enquiry formats

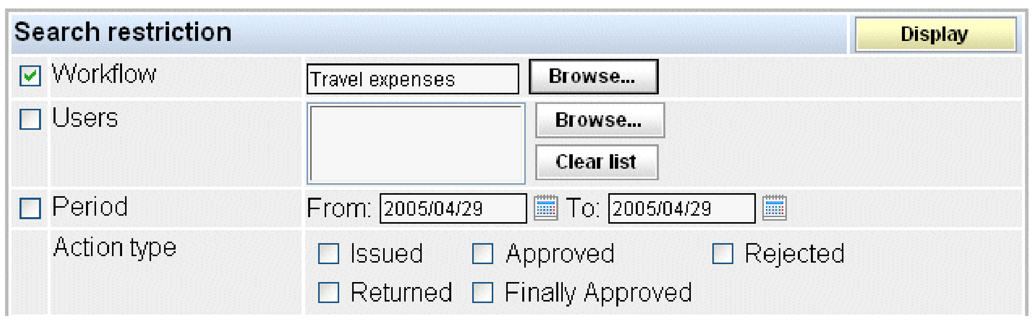
As ActiveFlow processes work items, it automatically collects information relating to the following:

- **Transactions** - ActiveFlow regards a transaction as the submission of a form by a user. This submission can be an approval as well as an issuing, return or reject operation. For example if a form is issued (made), then approved, then returned to maker, this means three transaction of different types.
  - **Total transactions** - this is the number of transactions recorded in a specified interval
- **Waiting time** - this is the elapsed interval from the arrival of a form in someone's in-tray to the moment the form is submitted by that user.
  - **Average waiting time** - this is the arithmetic mean of the waiting intervals for all the transactions considered. If the transactions are filtered by time interval, user, transaction type , etc , the average reflects the transactions resulting from filters. It is recommended to consider a large time interval in order to get meaningful results.
- **Total waiting time** - this is the sum of waiting intervals for all the considered transactions
- **Pending time** - Pending time can occur only when a workflow has an AND-Join activity. Let's suppose we have an activity a3 fed by two other activities a1 and a2. The form from a1 is first submitted at time **t1** and then the form from a2 is submitted at a later time, **t2**. User C who is assigned to activity a3 will receive the form in the in-tray only when both feeding forms are submitted, that is at time **t2.** During the time interval from t1 to t2 the form for activity a3 is in a **pending state,** and the time interval between t1 and t2 is called the **pending time.**



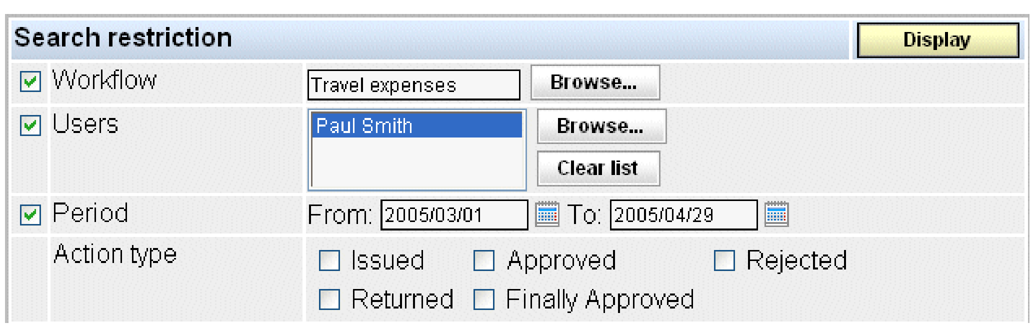
- **Average pending time** - this is the arithmetic mean of the pending intervals for all the transactions considered
- **Total pending time** - this is the sum of pending intervals for all the transactions considered

When generating an enquiry you must select the required enquiry outputs. The enquiry will display only the selected output values.



Input filters (Search restriction)

There are several filters that can be applied to the ActiveFlow data. If no filter is applied the whole set of existing data is considered when generating enquiry outputs.

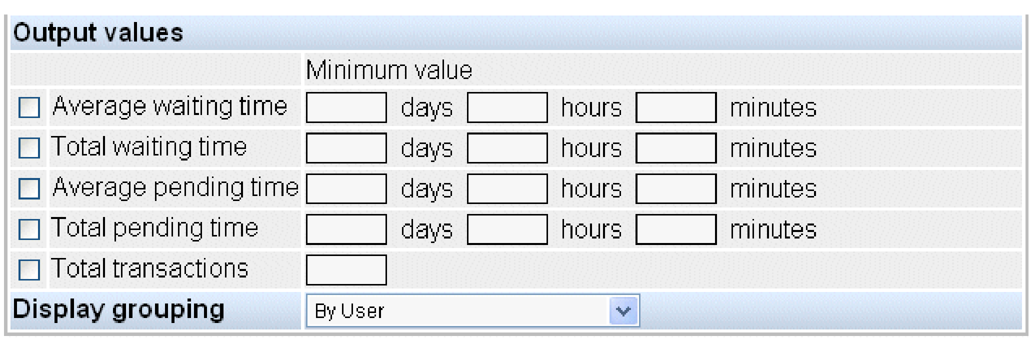


- **Workflow** - The Workflow filter restricts the input data for the generated enquiry to the activities of the selected workflow. The filter is activated when the associated checkbox is checked. When no workflow is selected the filter is not activated and data for all workflows is considered.
- **Users** - When the Users filter is activated, only transactions performed by selected users are considered. Add users to the user list by pressing the **Browse...** button. The Users List can be cleared pressing the **Clear list** button. The Users filter is activated when the associated checkbox is checked and there are users selected in the user list. When no user is listed in the Users List then the filter is not active, and all the users are considered.
- **Period** - The Period filter specifies the start date and the end date of the considered period. All the output values including average values or total values, will reflect only the transactions from the selected period of time.
- **Action Type** - The Action Type filter allows you to specify the type of transactions that will be considered in the enquiry. This can be from the following:
    - Issued - when a form is made (issued).
- Approved - approval type transactions are considered
- Rejected - form rejections are considered
- Returned - forms returned to maker or previous user are considered
- Finally Approved - forms associated with an end workflow activity are considered.

  When no Action Type is checked , transactions of all types are considered.
- **Output values** - The Minimum output values filter is a filter applied on the final (calculated) values. It actually deletes the lines from the output table having the output values less than the minimum value.

Displaying an enquiry

The enquiry is displayed as a table (a chart view is also available as discussed later). You can choose from several levels of detail.



You can detail by user, by action type or by activity. For example, if you choose to display only by user, then a total is made for all the considered transactions for each user and the results are displayed in a table.
As an example, in the following enquiry we filtered by 2 named users then selected three output values: Average waiting time, Total waiting time and Total transactions. We chose to display by user.

Selection: ActiveFlow Users Report (2002/8/7)
From: **To:**
Workflow: All;
User: Cartman Jim; Broklovski Ella;

User	Average Waiting Time	Total Waiting Time	Transactions
Broklovski Ella	00:00:07	00:03:24	29
Cartman Jim	00:02:50	00:19:50	7
	00:02:57	00:23:14	36

So the enquiry shows the total output values for all the transactions made by each of the selected users.
Now let's go further and detail by user and action type as well. For this, choose "by User and Action Type" in the Display grouping list and then press **Display** again.

Selection: ActiveFlow Users and Action Type Report (2002/8/7)
From: **To:**
Workflow: All;
User: Cartman Jim; Broklovski Ella;
Action Type: All;

User	Action Type	Average Waiting Time	Total Waiting Time	Transactions
Broklovski Ella	Issued	00:00:00	00:00:00	25
	Approved	00:00:51	00:03:24	4
Cartman Jim	Issued	00:00:00	00:00:00	2
	Approved	00:04:54	00:19:35	4
	Rejected	00:00:15	00:00:15	1
		00:06:00	00:23:14	36

Shown are the total values (waiting times and number of transactions) for all the transactions of each type for each user. You can also see an average waiting time.

In the same way, you can display the results by user, action type and activity name, or any combination of these. There is a lot of flexibility here for you.

Sorting the results

In the picture above, if you want to display the same enquiry in a slightly different way, having the action type on the first column and user names on the second, you can:

- go in the metrics page and select "by Action type and User" in the Display grouping drop-down list and then press **Display** again.

or

- move the mouse on the arrow in the head of the second column and click on it. the second column goes in the first position and the table looks like:

Selection: ActiveFlow Users and Action Type Report (2002/8/7)
From: **To:**
Workflow: All;
User: Cartman Jim; Broklovski Ella;
Action Type: All;

Action Type	User	Average Waiting Time	Total Waiting Time	Transactions
Approved	Broklovski Ella	00:00:51	00:03:24	4
	Cartman Jim	00:04:54	00:19:35	4
Issued	Broklovski Ella	00:00:00	00:00:00	25
	Cartman Jim	00:00:00	00:00:00	2
Rejected	Cartman Jim	00:00:15	00:00:15	1
		00:06:00	00:23:14	36

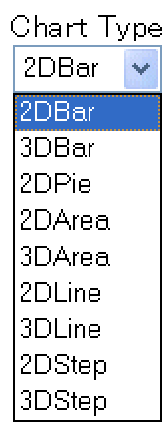
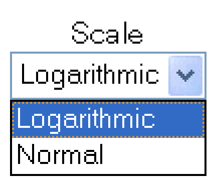
The table can be sorted by the output values too. Click on the column header of the output values and toggle between ascending sort and descending sort.

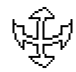
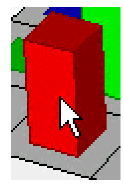
ng Time	Transactions
00:00:15	1
0:00:00	2
00:03:24	4
:19:35	4
:00:00	25
3:14	36

Displaying a chart

The data from the statistics enquiry view can also be displayed in a chart form. From the enquiry view just press the "Switch to chart view" button and the statistical data is displayed in a chart.

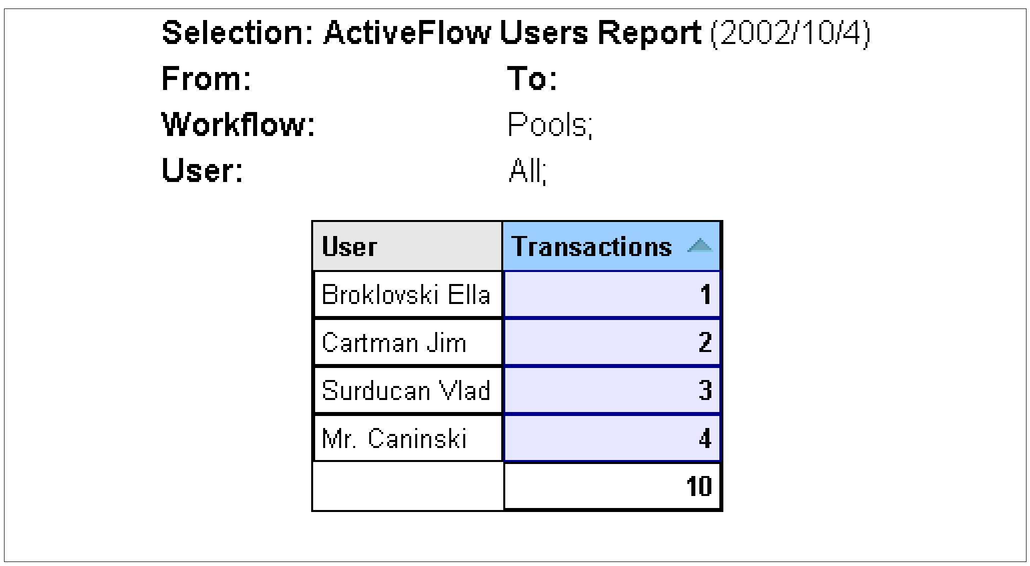
While in the chart view you can:

■ Enlarge or shrink the chart:	
■ Show / hide the chart legend:	
■ Change the chart type:	
■ Change the scale: With the logarithmic scale the dimension of the large values are shrunken and the dimension of the small values are increased in order to represent small values and large values on the same chart.	

■ Rotate the charts of 3D types : To do this, keep the CTRL key pressed, click and hold the left mouse button and move the mouse to rotate the chart.	
■ Show the exact value displayed in the chart: Click the mouse on an output value on the chart , and the exact value will be displayed on the status bar of Internet Explorer, e.g.  .	

ORDERING VALUES IN THE CHART

The data displayed in the chart is ordered in the same way as in the enquiry view. So, if you firstly order the output values in the enquiry view, the data in the chart will then be ordered, too.



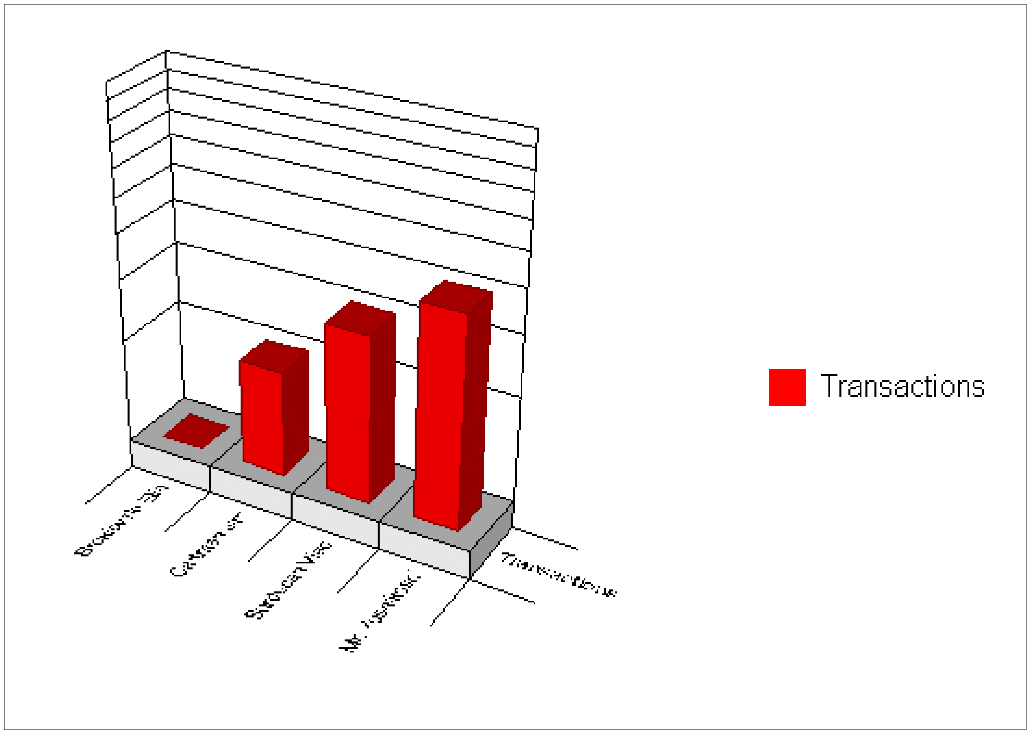
Selection: ActiveFlow Users Report (2002/10/4)

From: **To:**

Workflow: Pools;

User: All;

User	Transactions
Broklovski Ella	1
Cartman Jim	2
Surducan Vlad	3
Mr. Caninski	4
	10


Transactions

Workflow status

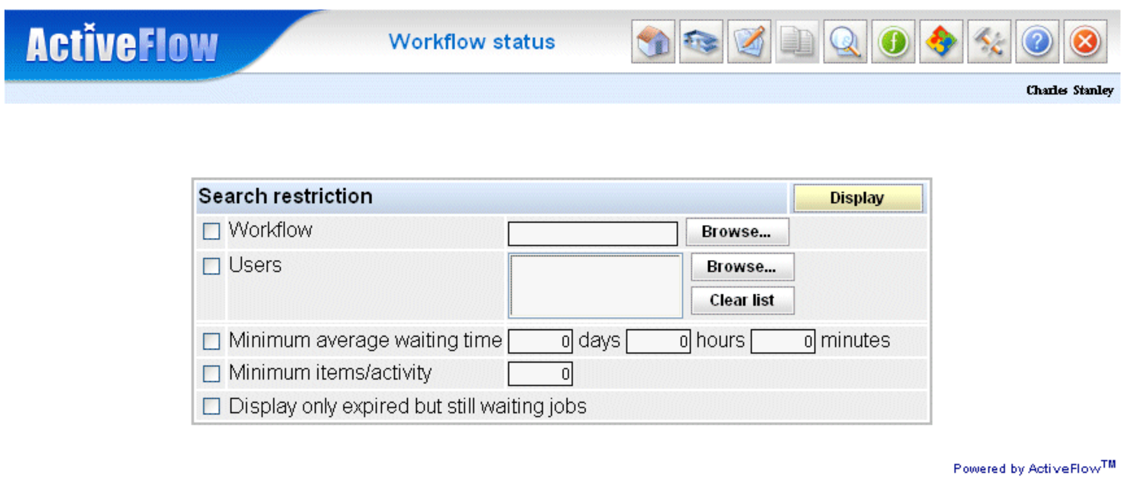
An operations manager often wants to know key information about workflows. For example:

- What was the average waiting time of a workflow item in an in-tray?
- Did we meet the Service Level Agreement (SLA)?

The ActiveFlow Workflow status facility offers a lot more information besides, for example:

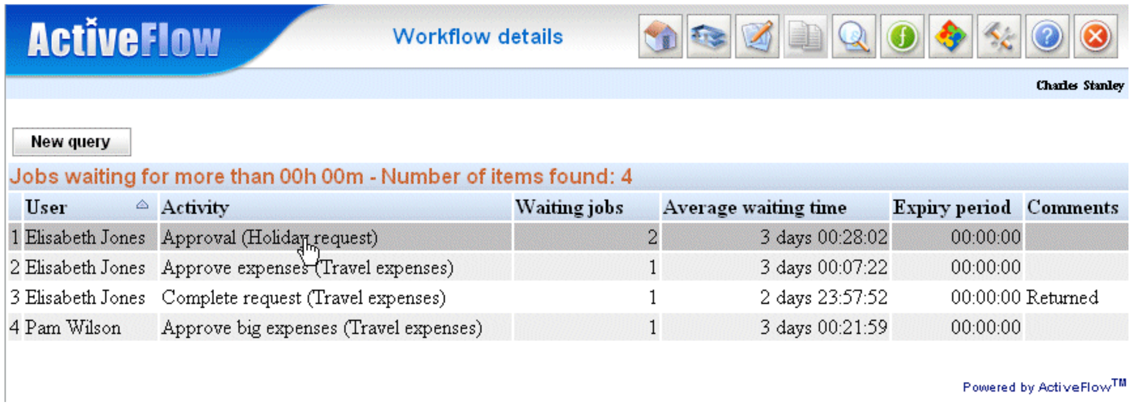
- "Show all workflow items that have been in the In-tray longer than 1 day" - A filter is provided (Minimum average waiting time).
- "Show all workflows waiting in the In-tray that have expired but are not yet Auto approved"

The resulting values will be grouped by user and activity. Pressing the **Workflow status** button displays a search page as below:



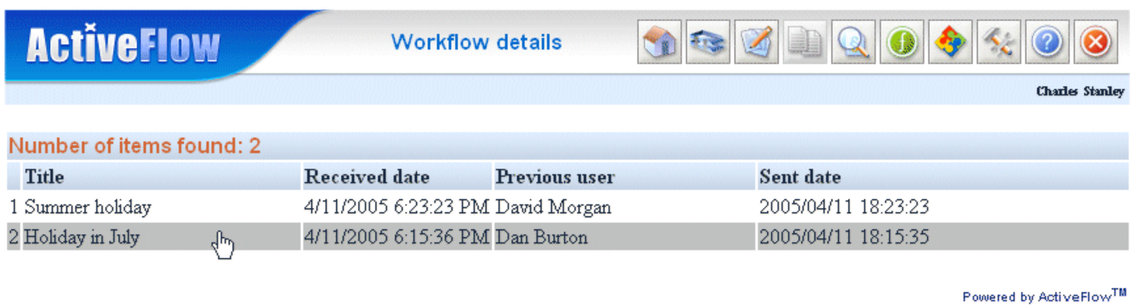
You may impose restrictions regarding the workflow and users to be displayed by selecting the appropriate checkboxes and values.
Also, by specifying the minimum number of items/activity it is possible to limit the number of items displayed in the enquiry (e.g. you want to see only users who have more than 20 waiting jobs per activity in their in-tray).
By default, the enquiry will display **all** waiting jobs. In order to view only the jobs which expired but are still waiting you must select the appropriate check box.

The following type of result will be displayed:



	User	Activity	Waiting jobs	Average waiting time	Expiry period	Comments
1	Elisabeth Jones	Approval (Holiday request)	2	3 days 00:28:02	00:00:00	
2	Elisabeth Jones	Approve expenses (Travel expenses)	1	3 days 00:07:22	00:00:00	
3	Elisabeth Jones	Complete request (Travel expenses)	1	2 days 23:57:52	00:00:00	Returned
4	Pam Wilson	Approve big expenses (Travel expenses)	1	3 days 00:21:59	00:00:00	

By clicking on the **User, Activity, Waiting jobs** or **Average waiting time** column headings, the items will be ordered in ascending or descending sequence. In the **Activity** column, the name of activity is followed by the workflow name between the brackets ().
The **Expiry period** column displays the expiry value set in the map for each activity.
The **Comments** column shows the type of the waiting jobs: returned or held. A blank entry in this column means normal waiting jobs.
By clicking on a row, you can drill down to see the details (title, approved date, sender etc) regarding the selected item.



	Title	Received date	Previous user	Sent date
1	Summer holiday	4/11/2005 6:23:23 PM	David Morgan	2005/04/11 18:23:23
2	Holiday in July	4/11/2005 6:15:36 PM	Dan Burton	2005/04/11 18:15:35

Note: For normal waiting jobs the enquiry will display also the associated special field values.

Also please note that if you click on an item, the form will be displayed in read-only mode.

Work in progress

The "Work in progress" enquiry function gives you the ability to get a rapid overview of the work in progress at a certain point in time. This can highlight key issues and answer questions of the type:

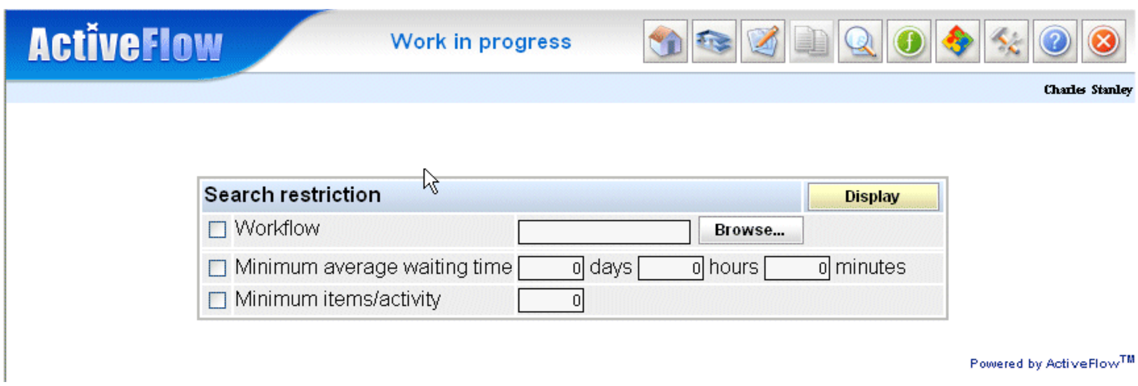
- What is the average or maximum waiting time for certain workflow activities?
- How many workflow items were processed?

There is also another enquiry that gives even more detailed information on the current status. See the Workflow status enquiry.

Work in progress enquiries allows you to see the values shown below, detailed at the activity level:

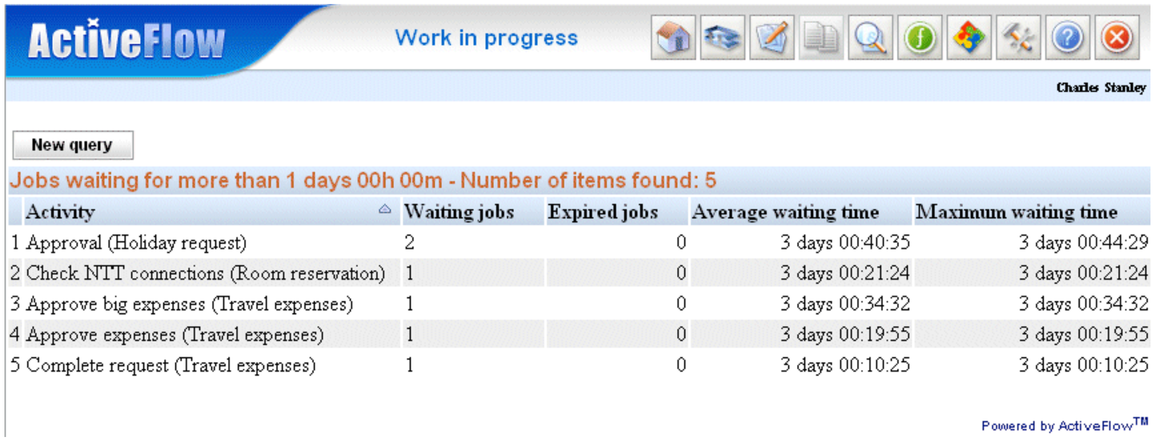
- The number of waiting jobs;
- The number of expired jobs
- The average waiting time of currently waiting jobs
- The maximum waiting time from the current waiting jobs .

Pressing the **Work in progress** button displays a search page as below:



You may impose restrictions regarding the workflow to be displayed by selecting the appropriate checkbox and value. By specifying the Minimum average waiting time the enquiry will display only the information for activities that have waiting jobs with an average waiting time per activity greater than the specified value. Also, by specifying the minimum number of items/activity it is possible to limit the number of items displayed in the enquries (e.g. you want to see only activities that have more than 20 waiting jobs).

Regardless of the option selected above, the following type of result will be displayed:



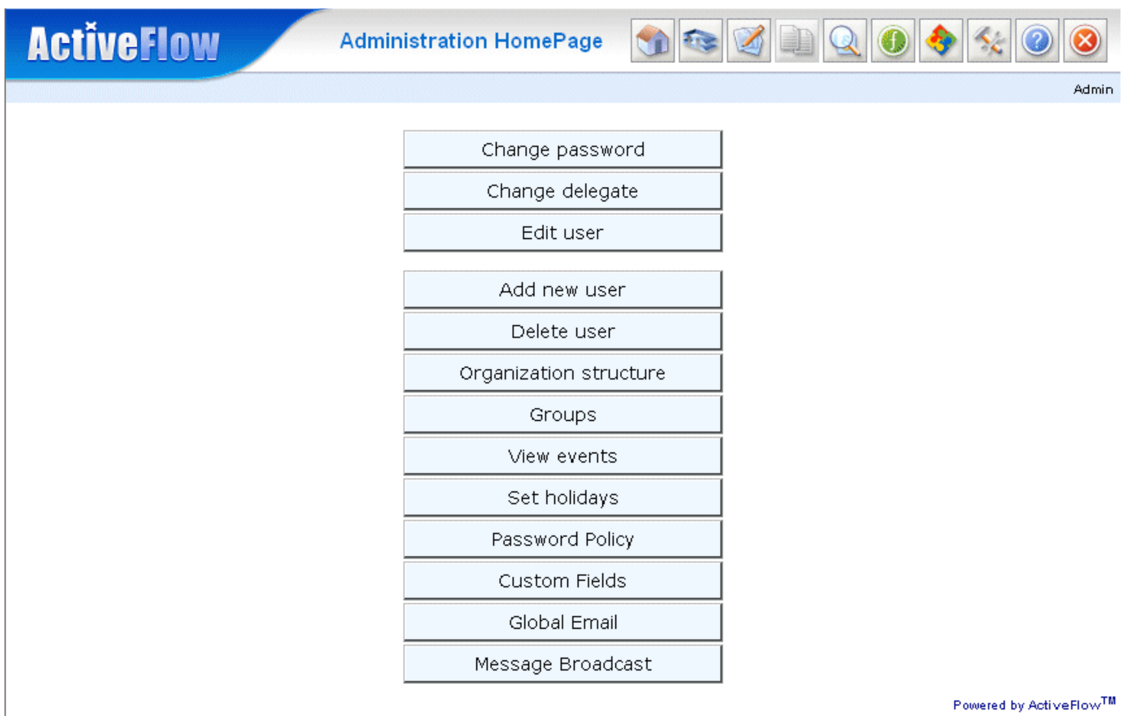
By clicking on the **Activity, Waiting jobs, Expired jobs, Average waiting time** or **Maximum waiting time** column headings, the items will be ordered in ascending or descending sequence. In the **Activity** column, the name of the activity is followed by the workflow name between the brackets ().

Administration

Before we begin we should note that some of the administrative pages are available only to users who have admin or superadmin rights. Also, according to your admin rights you may see or not certain fields.

After you have logged in to ActiveFlow, you can access the Admin functions by clicking the **Admin** button on the **ActiveFlow main menu** itself or by clicking the **Admin** button on the menu bar.

The **Admin menu** shown below appears. If you have no admin rights, only the first three buttons will be displayed.
Use this page to perform admin tasks for users and to change the structure of the organization. You can also view the event log from here.



User rights

User rights allow people to do things depending on their level of authority. ActiveFlow has three levels for user rights:

Superadmin
Admin
Ordinary user

Superadmin rights

A Superadmin user (a user with Superadmin rights) has no restrictions at all, and can do all administrative jobs anywhere in the company.

The Superadmin user can, for example:

- Add, delete, and move departments and roles
- Add, delete, and move users
- Change the properties of any user.

Admin rights

An Administrator (a user with admin rights) has absolute rights in the Administrator's department and all its sub-departments.

The administrator can:

- Add/delete/move sub-departments in the department
- Add/delete/edit users in the department or its sub-departments
- Add/delete/move roles in the department or its sub-departments
- Edit a user who belongs to this department and also belongs to another department.

The administrator cannot:

- Add/delete/move sub-departments that are not in the administrator's department
- Add/delete/move roles in sub-departments that are not in the administrator's department
- Add/delete/edit users in sub-departments that are not in the administrator's department
- Move a sub-department, role, or user from the administrator's department to another department.

Ordinary user rights

An ordinary user does not have Superadmin or admin rights and cannot do any administrative tasks.

An ordinary user can however use the **Edit user** form to edit some of the user's own properties:

- First and Last name
- E-mail address
- Phone number
- Change bubble-up routing information (Normal and alternative route)
- Password (using the **Change password** form)
- Delegate: a user can change, disable, and enable a delegate (using the **Delegate** form).

An ordinary user cannot:

- Add/delete/move departments or roles anywhere in the company
- Add/delete users
- Edit the properties of other users.

Note:
Superadmin rights can be granted only by another user with Superadmin rights. Admin rights can be granted only by a user with Superadmin rights or an Administrator.
Admin rights are a property of a user. If a user has admin rights and belongs to two departments, say A and B, the user automatically has the same admin rights in both departments.

Access rights

ActiveFlow allows different access rights to be assigned to users and/or groups of users. For a user/group it is possible to specifically allow/deny access to a certain resource. A resource can be:

- An ActiveFlow Standard Page
- Certain Functionality
- Certain Information

Below is the list of resources for which access can be restricted:

Standard pages

- Start workflow
- In-tray
- Cancel workflow
- Emergency approval
- Special view
- Statistics pages
- Admin pages
- Enquiries

Certain Functionality

- View/Select workflows
- View/Select departments
- View/Select users

Certain Information

- View activity names
- View user names
- Pressing the View button for viewing a workflow form

A resource is accessible to a user if **ALL** of the conditions below are met:

- The *allow flag* for the resource is set on **OR** the user belongs to at least one group which has the *allow flag* to the resource set on.
- The *deny flag* for the resource is not set on **AND** the user does not belong to any group which has the *deny flag* for the resource set on.

The above access rights can be set for users or for groups by a user with administrative rights.

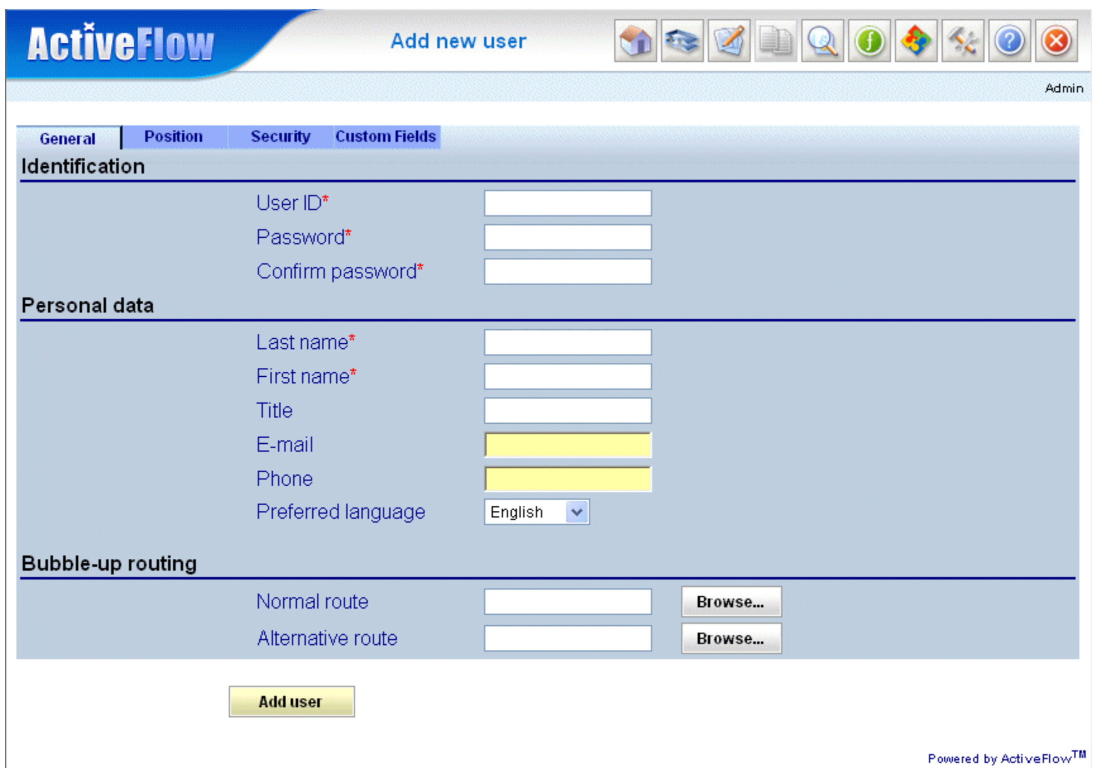
Adding a new user

Use the form shown below to add new users to the organization structure. Adding new users is governed by the user rights. The **Add New User** form has 4 sections:

- General - contains general attributes of the user
- Position - used for positioning the user within the organization structure and also for assigning the user to one or more user groups.
- Security - you can set up the access rights for the new user
- Custom Fields - here company specific custom fields can be set. See the Custom fields section for more details.

Note: Items marked with an asterisk (*) are mandatory items.

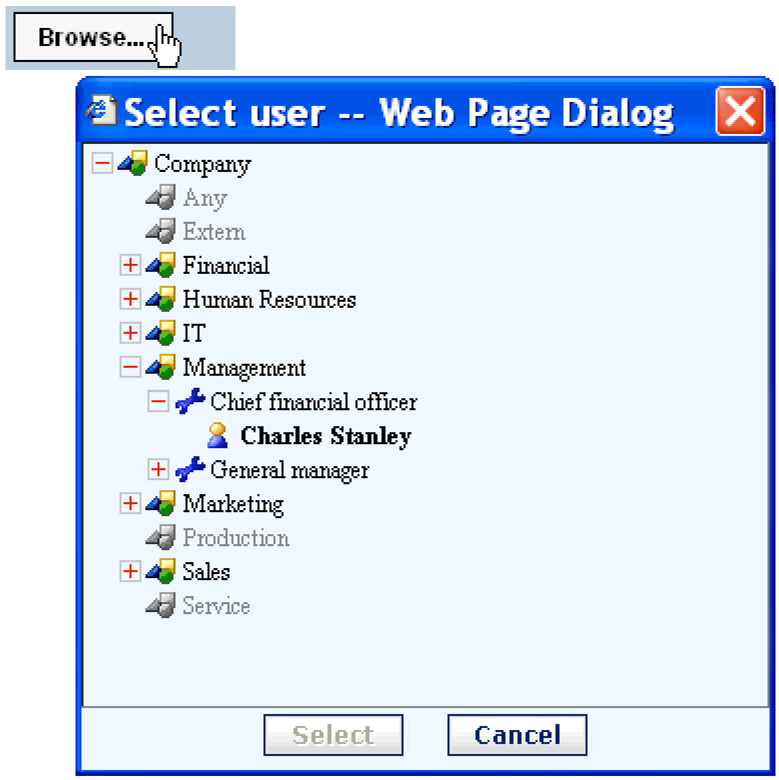
General section



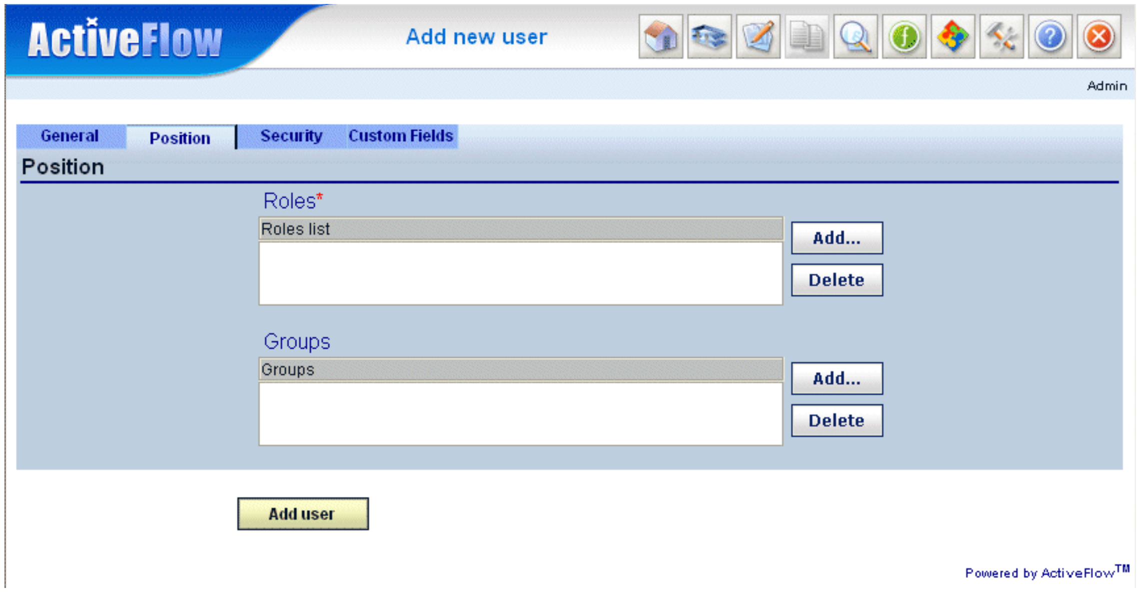
- Complete the User ID, password (plus password confirmation), and Personal data fields. For **User ID**, choose any easy-to-remember alphanumeric string. If the User ID has already been taken by another user, an error message will appear when you press the **Add user** button. You must fill in the **User ID** and at least one from **First name** and **Last name**. The language selected here will be the language used in the

ActiveFlow forms for this user. This can be changed later from the **Edit user** form.

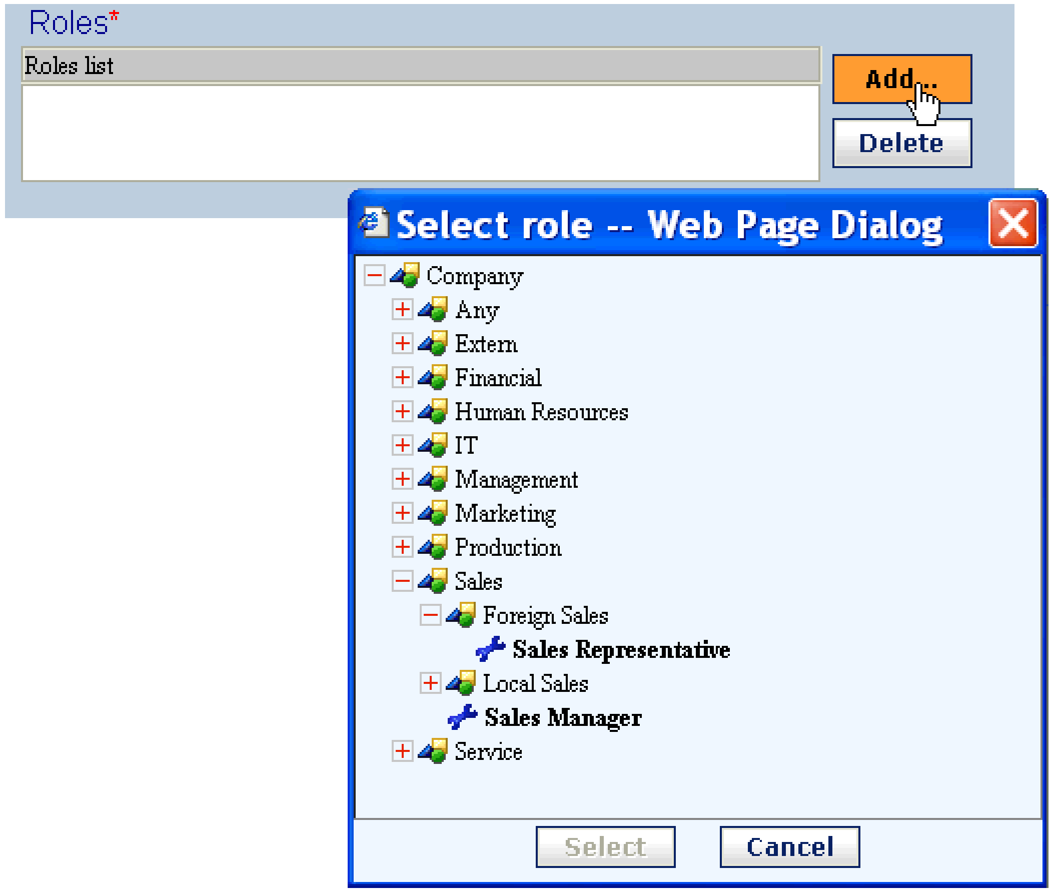
- Select the users for Bubble-up routing. To do this press the **Browse…** button next to each user display field. A dialog appears showing the structure of the company and the users at each position. Navigate through the company tree and select the right person. This information will be used for bubble-up based workflows. The selection dialog is shown below.



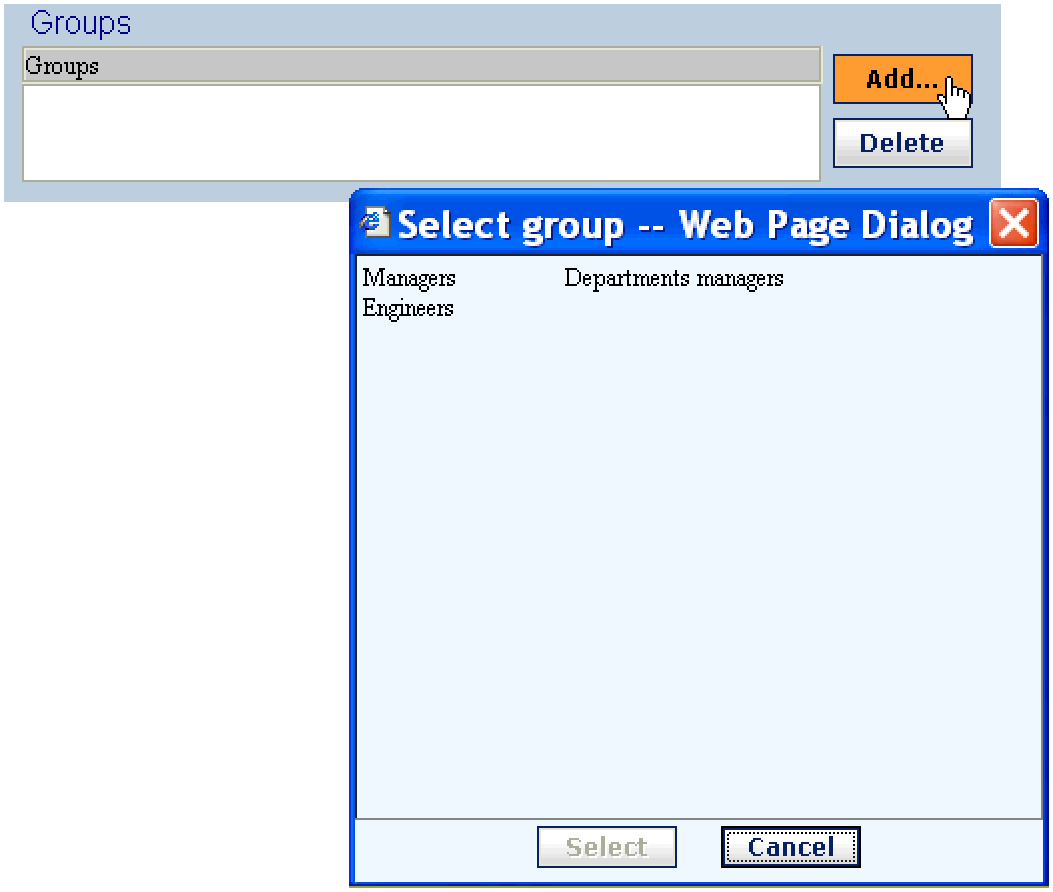
Position section



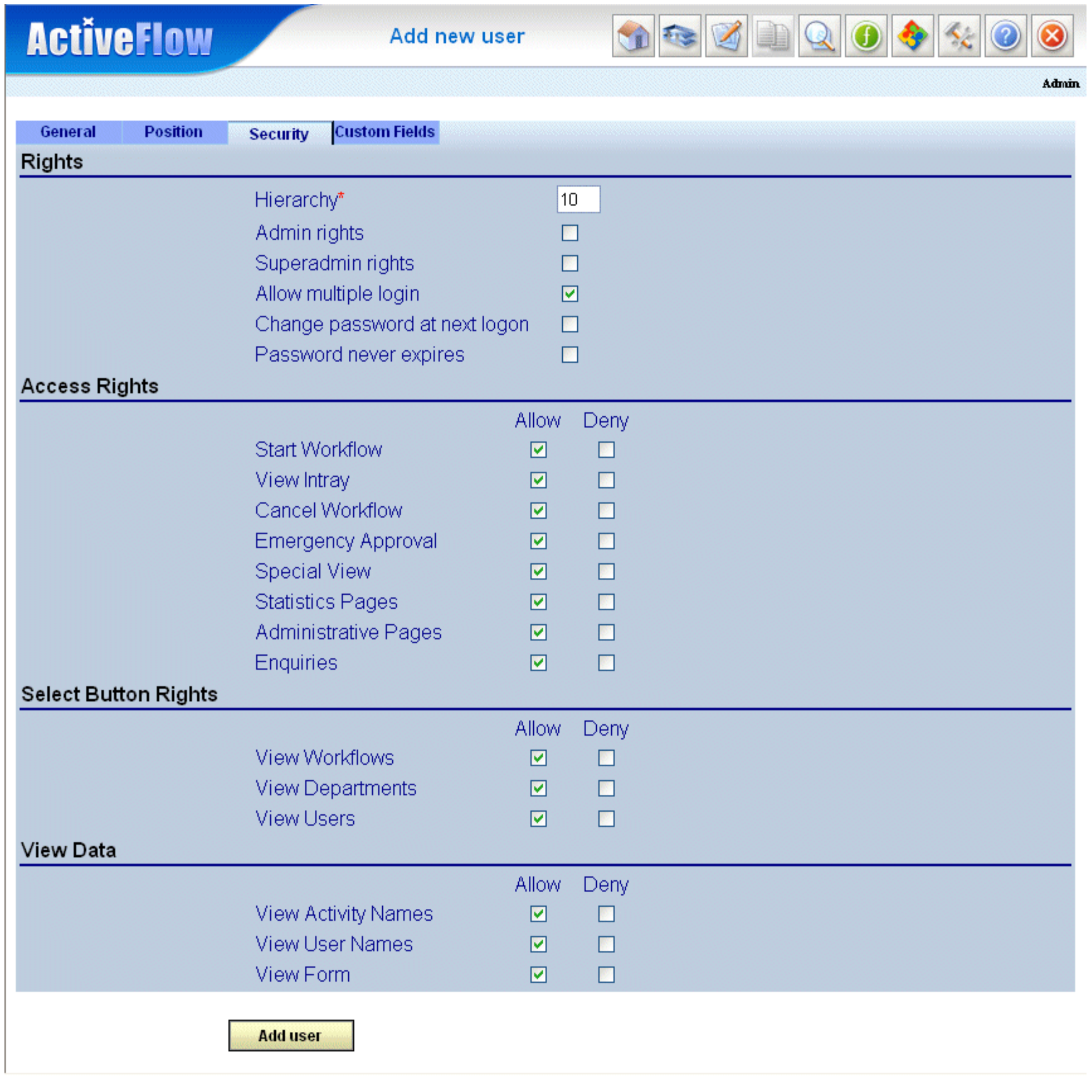
- Select the role of the user in the company. A user can have multiple roles. To add a role to the Roles list use the **Add...** button. A dialog appears showing the structure of the company (department and roles). Select a role item and press **Select** or double-click the role item. The role name (prefixed by the department's path) will be added to the Roles List. To add more roles to the Roles List press the **Add...** button again.



- Optionally, select the groups to which the user belongs. After selecting, the selected groups are shown in the list box.


Groups
Groups
Add...
Delete
Select group -- Web Page Dialog
Managers
Departments managers
Engineers
Select
Cancel

Security section



- **Hierarchy** - Set the hierarchy level, and administrative rights. If you have Superadmin rights, the Superadmin checkbox is displayed so you can optionally grant Superadmin rights to the newly added user. There should not be many Superadmin users in the organization, because they have great power.
- **Allow multiple login**:
  - If this is checked ON, it specifies that the user can log in to ActiveFlow from more than one computer or browser window at the same time. The system creates independent work sessions, one for each login.

  - If this is not checked (i.e. checked OFF), only one session per user ID is allowed at one time. If the user logs in again from another browser window or another computer, the previous session will be invalidated.
    By default, this setting is checked ON.
- **Change password at next logon**: Specifies that the user must change the password at the next logon. The user will be forced to change the password even if the "Password never expire" setting is checked ON.
- **Password never expire**: Specifies that the user's password will never expire. The "**Maximum password age**" setting from the Password policy administration page is ignored for the new user if this setting is checked ON. The setting could be useful for robot users, for example.
- Set the appropriate access rights. **Note:** by default the user has full access rights.

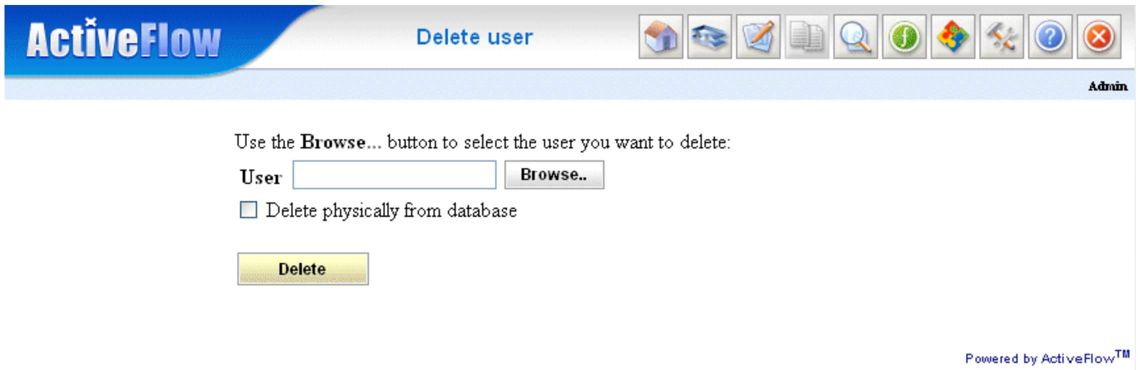
Custom Fields section

- Set the appropriate custom values if necessary. This screen will contain data customized for each company.

Press the **Add user** button at the bottom of the page to add the new user to the database. A confirmation message will appear.

Deleting a user

Only a user who has Superadmin or admin rights can delete users. See the User rights for details.



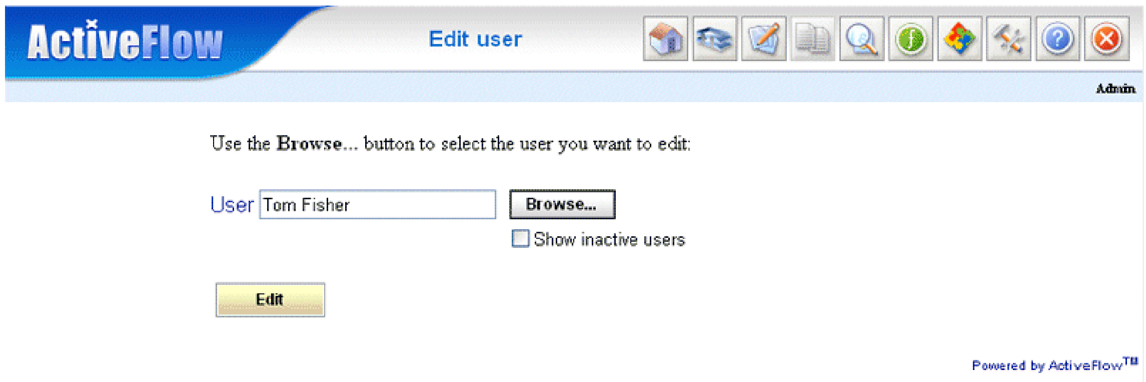
To delete a user

1. Press the **Browse.** button. A dialog appears displaying the company structure.
2. Navigate through the organization tree to the department and role that contain the user you want to delete. Double-click the role to see the users in it.
3. Double-click the user you want to delete or select the username and press the **Select** button. The dialog will close and the username of the user you want to delete appears in the User ID box.
4. Press the **Delete** button to delete the user. A confirmation message appears.

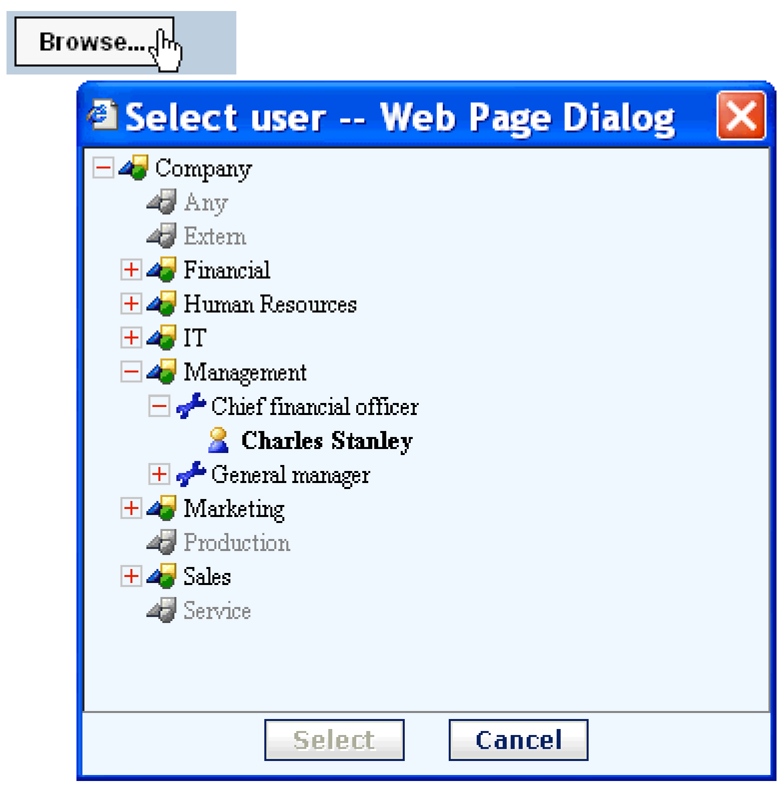
Editing user details

Follow these steps to edit the properties of a user:

1. On the Admin menu select the **Edit user button**. The **Edit user** form appears.



2. Select the user by pressing the **Browse...** button. If you press the **Browse...** button the dialog below appears.



3. To select a user double-click the user item or highlight the user and press the **Select** button. The dialog closes and the username of the selected user is put into the **User ID** box.
   The **Cancel** button closes the dialog without selecting any user.
4. Press the Edit button. A form similar to the Add user form appears.
5. Edit the user properties, then press the Update button. A confirmation message appears.

When the "**Show inactive users**" checkbox is selected, the inactive users are made visible. In the root department of the company a special role named "**Inactive Users** " will be displayed. This special role contains the inactive users for the company.

See the User rights section for further details about Edit operations.

Set delegate

To see the **Change Delegate** form, press the **Change delegate** button on the Admin menu.

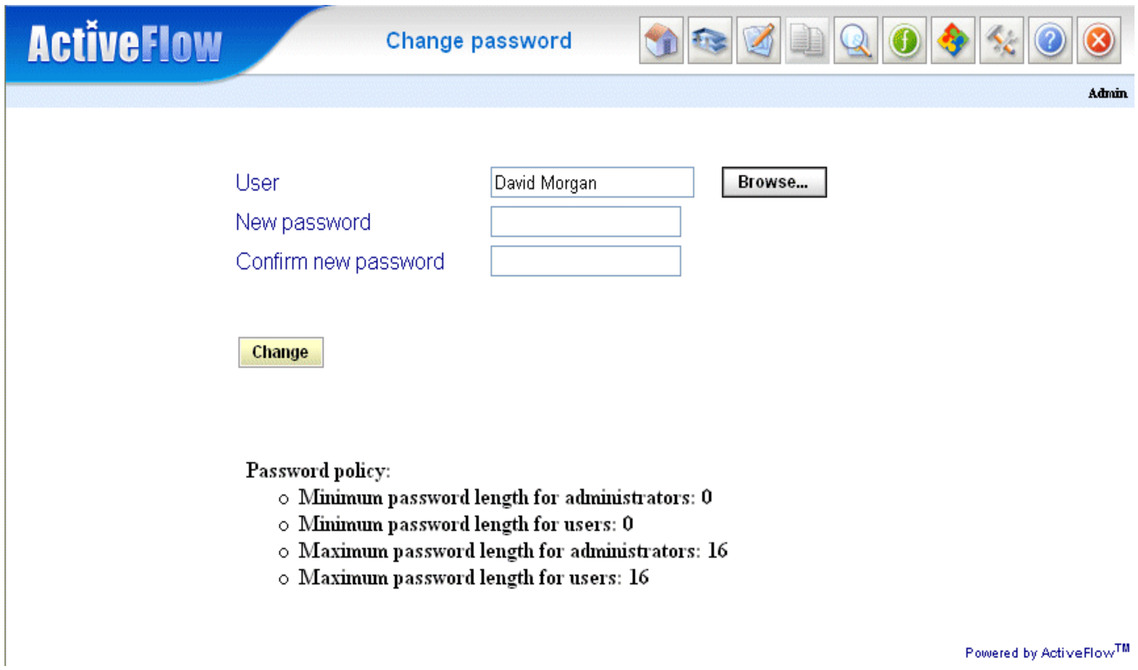
Any user can activate, change, or deactivate his own delegate or delegate maker. A user who has admin rights can also modify the delegate or delegate maker of any user in his department. A user with Superadmin rights can modify everyone's delegate or delegate maker.

How to modify delegate or delegate maker settings.

1. Use the **Browse...** button to select the user you want to set the delegates. If you have no administrative rights your User name is shown by default and the browse button is not displayed.
2. Select the delegate or delegate maker by pressing the appropriate **Browse...** button. This step is optional. If a delegate name is already selected and you don't want to change it, go to step 3.
3. Activate/deactivate the delegate or delegate maker by checking or unchecking the corresponding checkbox. The delegate will receive all the jobs of the current user until the checkbox is unchecked. The delegate maker can start workflows on behalf of selected user until the corresponding checkbox is unchecked.
4. Press **OK** to apply the changes.

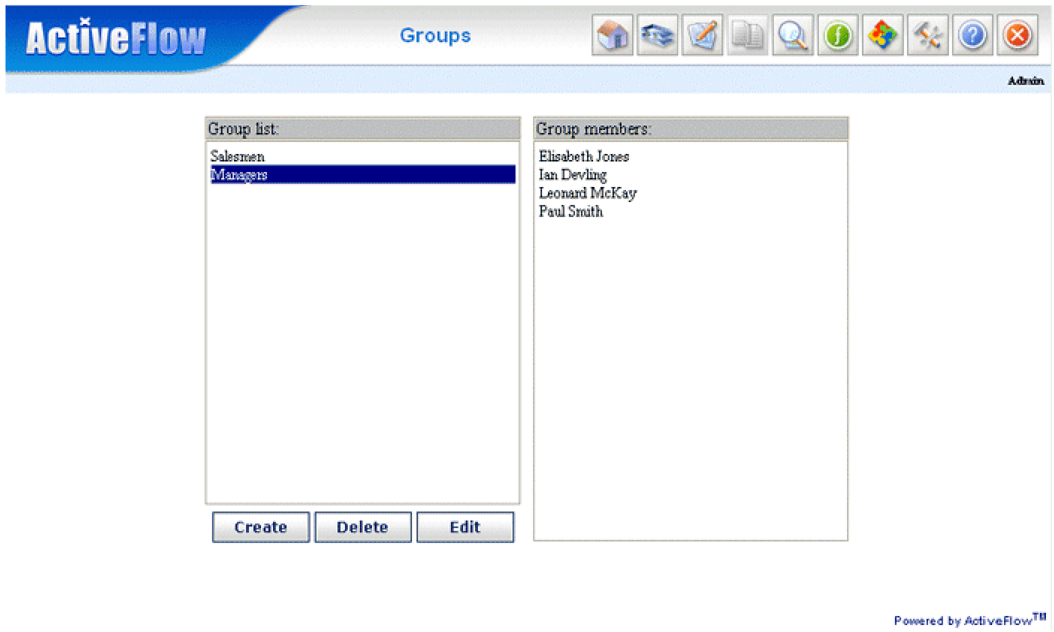
Change password

To change your password, press the **Change** password button on the Admin menu. If you have Admin or Superadmin rights you can change the passwords of other users.



1. Use the **Browse...** button to select the user whose password you want to change. If you have no administrative rights then the **Browse...** button will not be displayed.
2. Type in the old password and the new password. Then type the new password again to confirm it.

Groups



Superadmin users can create, delete, and edit groups of users by choosing the **Groups** form on the Admin menu.

The form contains a list of the user groups defined in the workflow, and has buttons for adding, deleting, and editing groups.

To create a new group

1. Press the **Create** button. The following dialog appears:

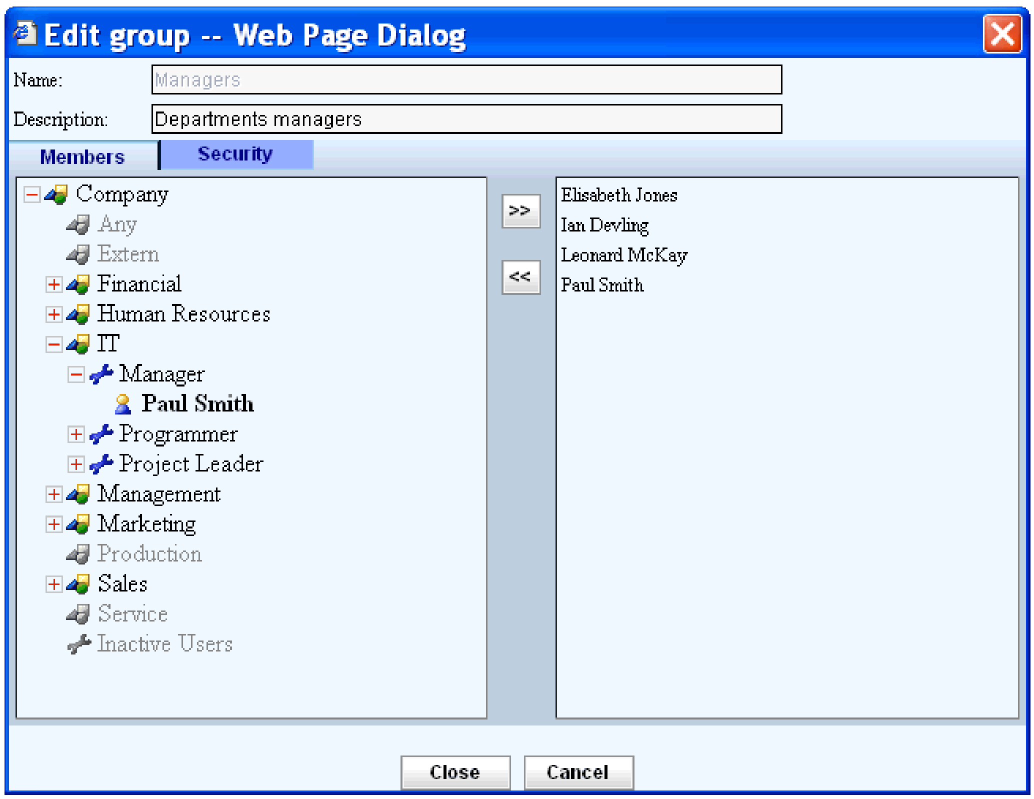
2. Type the name of the new group and a short description. Then press OK
3. In order to add users to the group, see the **Edit group** section below.

To delete a group

1. Select the group in the **Group** list
2. Press the **Delete** button. A confirmation message appears
3. Press OK to delete the group.

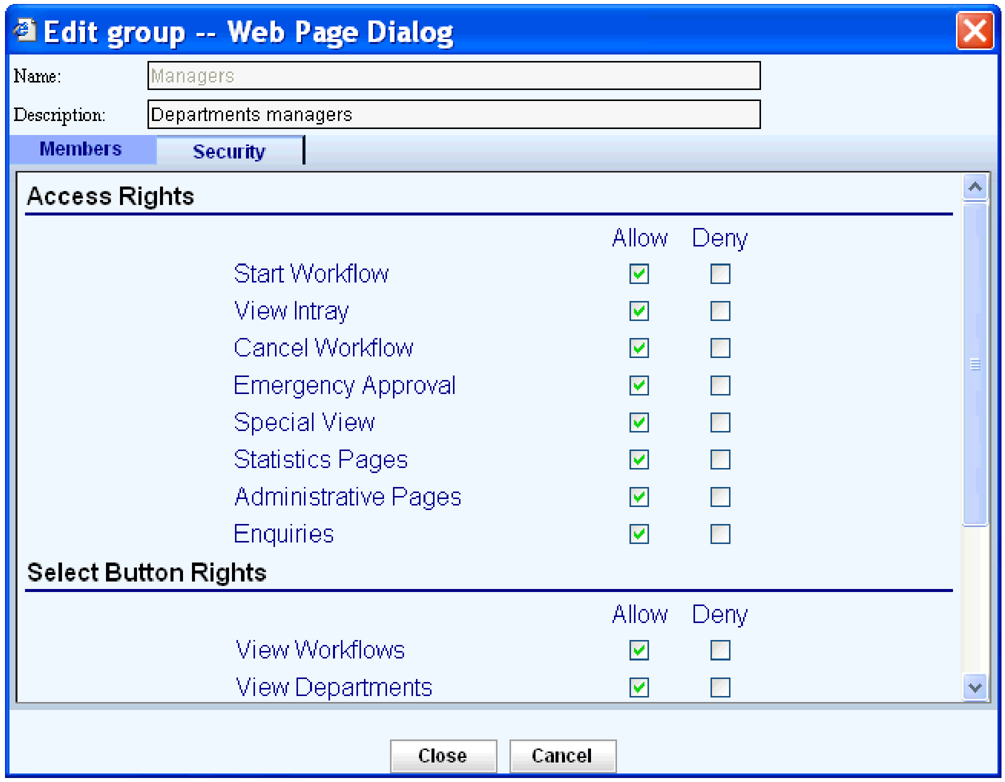
To edit a group

1. Select the group in the **Group** list
2. Press the **Edit** button. The following dialog appears.



3. In the **Members** section Use the **>>** button to add users. Use the **<<** button to delete users from the **Group** list

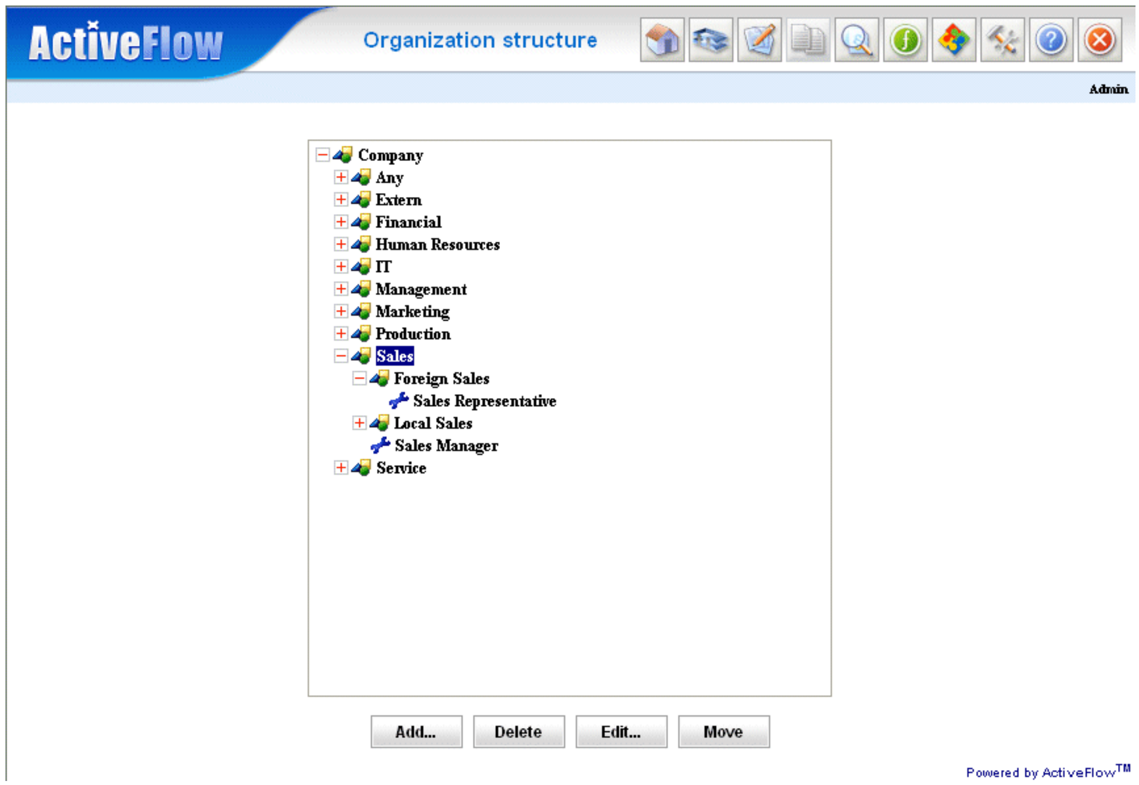
4. In the **Security** section set the appropriate access rights for this group.



5.Press Close to save the changes you have made.

Organization structure

To modify the structure of departments and roles in the company, on the **Admin menu**, choose the **Organization structure** button. The Organization structure form appears.



You use this form to:

- Add a new department
- Add a new role
- Delete a department
- Delete a role
- Move a department
- Move a role

To add a new department

1. From the Organization structure, select the area where you want to add the new department.
2. Click the **Add...** button. The **Add Department/Role** dialog appears.

3. This dialog contains text boxes that allow you to enter:
   - The name of the department or role (use the radio button to choose either department or role)
   - The optional code of the department or role.
4. Enable the Add department function by clicking the **Department** radio button (this is selected by default)
5. Enter the name of the department in the text box
6. Enter the department code (optional)
7. Click the **Add** button to close the dialog and add the new department to the hierarchy, or click **Cancel** to close the dialog without changing the structure.

To add a new role

1. Select the department where you want to add the new role
2. Click the **Add...** button. The **Add department/Role** dialog opens
3. Enable the Add role function by clicking the **Role** radio button
4. Enter the name of the role in the text box
5. Enter the role code (optional)
6. Click the **Add** button to close the dialog and add the new role to the hierarchy, or click **Cancel** to close the dialog without changing the structure.

Notes:

- You must enter a name for the new department or role
- You cannot add a role under a role. The parent of a role must be a department.

To delete a department

1. Select the department you want to delete
2. Click the **Delete** button. A message appears to confirm that you want to delete the selected department
3. Click **OK** to delete the department or **Cancel** to leave the selected department unchanged.

To delete a role

1. Select the role you want to delete
2. Click the Delete button. A message appears to confirm that you want to delete the selected role
3. Click OK to delete the role or Cancel to leave the selected role unchanged.

To move a department

An administrator can move a department in the organization hierarchy by a drag and drop operation.

1. Select the department that you want to move by left-clicking it
2. Keeping the mouse button pressed, drag the department to the place you want it in the hierarchy
3. Release the button to drop the selected department into the desired department. The selected department and all its sections and roles, with their hierarchy intact, have now moved into the target department.

To move a role

An administrator can move a role from one department to another in the organization hierarchy by a drag and drop operation.

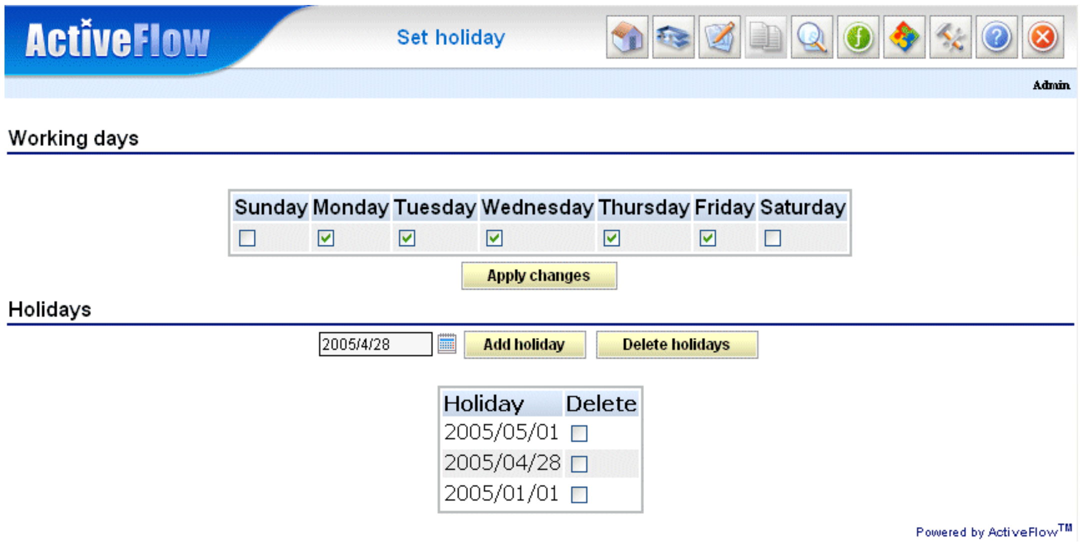
1. Select the role that you want to move by left-clicking it
2. Keeping the mouse button pressed, drag the role to the place you want it in the hierarchy
3. Release the button to drop the selected role into the desired department.

Notes:

- If the target item is a role the move operation will be aborted.
- If you release the left mouse button and no item is selected the move operation is aborted.

Set holidays

This function allows the administrator to specify the working days as well as the "public" holidays. This is useful for the workflow expire functionality.
Please note that only users with superadmin rights may access this page.



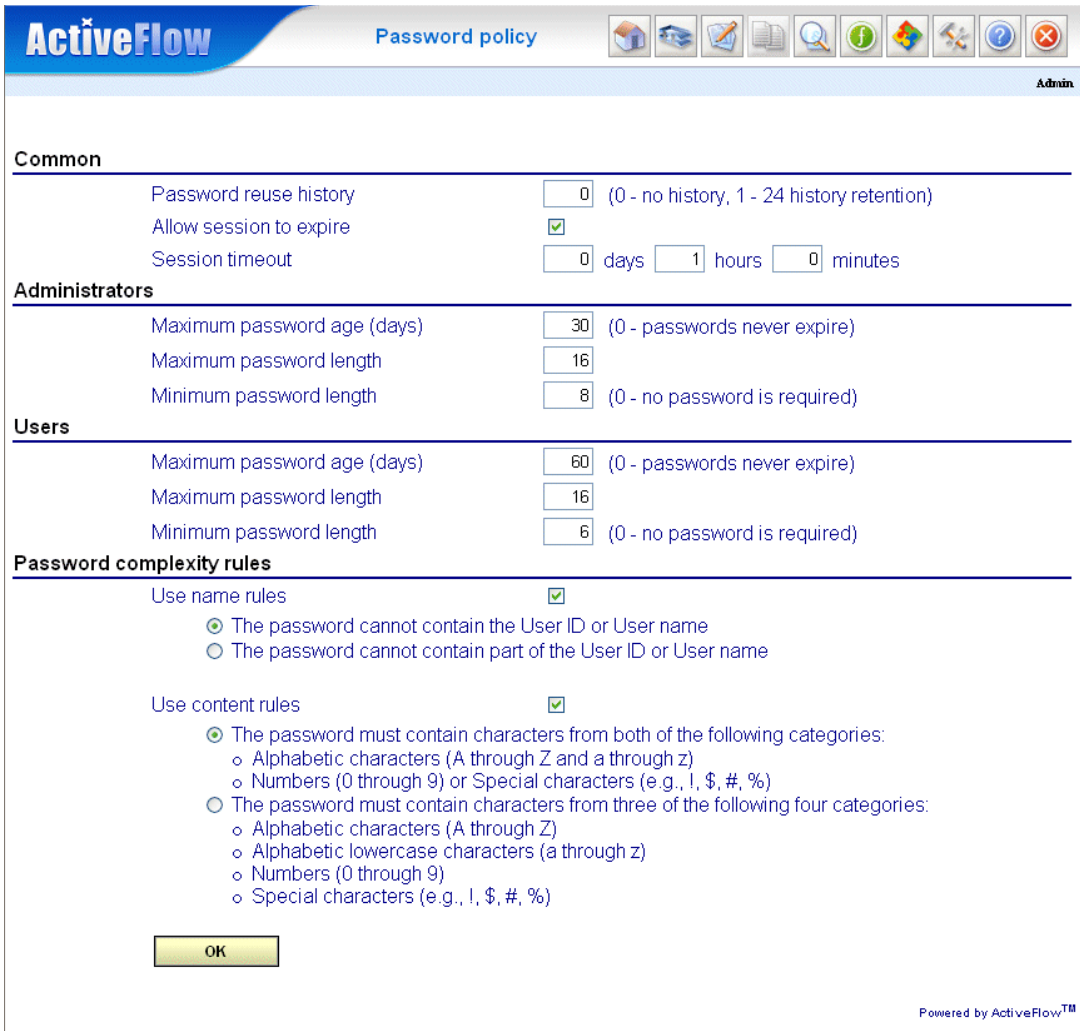
Note:

The superadmin should define only public holidays which are during the working days. Bychecking the appropriate checkboxes, the superadmin may delete certain days.

Set password policy

These settings allow the superadministrator to specify restrictions for old password reuse, maximum age of passwords, length of passwords, password content, and session expiration.

These settings allow the super-administrator to specify restrictions on old password reuse, maxium age of passwords, length of passwords, password content, and on session expiration.



Password reuse history: Determines the number of unique new passwords that have to be associated with a user account before an old password can be reused. The value must be between 0 and 24 passwords. A value of 0 specifies that no old password verification is made. This policy enables administrators to enhance security by ensuring that old passwords are not reused continually. The default value is 0.

Maximum password age: Determines the period of time (in days) a password can be used before the system requires the user to change it. You can set passwords to expire after a number of days between 1 and 999, or you can specify that passwords never expire by setting the number of days to 0. This setting can be set separately for administrators (superadmin and admin) and regular users. The default value is 0.

Minimum password length: Determines the least number of characters that a password for a user account must contain. You can set a value between 1 and 16 characters, or you can establish that no password is required by setting the number of characters to 0. This setting can be set separately for administrators (superadmin and admin) and regular users. The default value is 0.

Password complexity rules: Determines whether passwords must meet complexity requirements. These settings have two subcategory rules: name rules and content rules. Complexity requirements are enforced when passwords are changed or created.

- **Name rules**: If this rule is used, superadministrators can choose between two options: the password should not contain User ID or User name or the password should not contain part of the User ID or User name. The first option specifies that the password cannot contain the User ID or either of the user's names and the second option specifies that the password cannot contain more than 2 consecutive characters from the User ID or any user's names.
- **Content rules**: If this policy rule is enabled, the superadministrator can choose that passwords must meet one of the following groups of minimum requirements:
    - The password must contain characters from three of the following four categories:
        - Alphabetic characters (A through Z)
        - Alphabetic lowercase characters (a through z)
        - Numbers (0 through 9)
        - Special characters (e.g., !, $, #, %)

  <u>or</u>

    - The password must contain characters from both of the following two categories:
        - Alphabetic characters (A through Z and a through z)
        - Numbers (0 through 9) or Special characters (e.g., !, $, #, %)

Session expiration settings: Every time a user logs in to ActiveFlow a new "user session" is created on the server. This session is destroyed when the user logs out from the system using the **"Exit"** button. Leaving the system by closing the browser window will not destroy the sessions created so the ActiveFlow server will destroy the session after a period of session inactivity. **Session timeout** setting determines the maximum period of time a session can live. You can set the life period from 30 minutes to 5 days or to the maximum session timeout allowed on the system (10days) by unchecking the **Allow session to expire** setting. Keeping one of the ActiveFlow pages open in the browser will keep the session alive for a period of time equal to the`maximum session timeout` allowed on the system. It is recommended to set a relatively short **Session timeout** value (e.g. 1 hour). The default value for session timeout is 1 hour.

When a user tries to Log-in after the password has expired, the user will be prompted with the page below,

Password reuse history: Determines the number of unique new passwords that have to be associated with a user account before an old password can be reused. The value must be between 0 and 24 passwords. A value of 0 specifies that no old password verification is made. This policy enables administrators to enhance security by ensuring that old passwords are not reused continually. Default value is 0.

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- Numbers (0 through 9)
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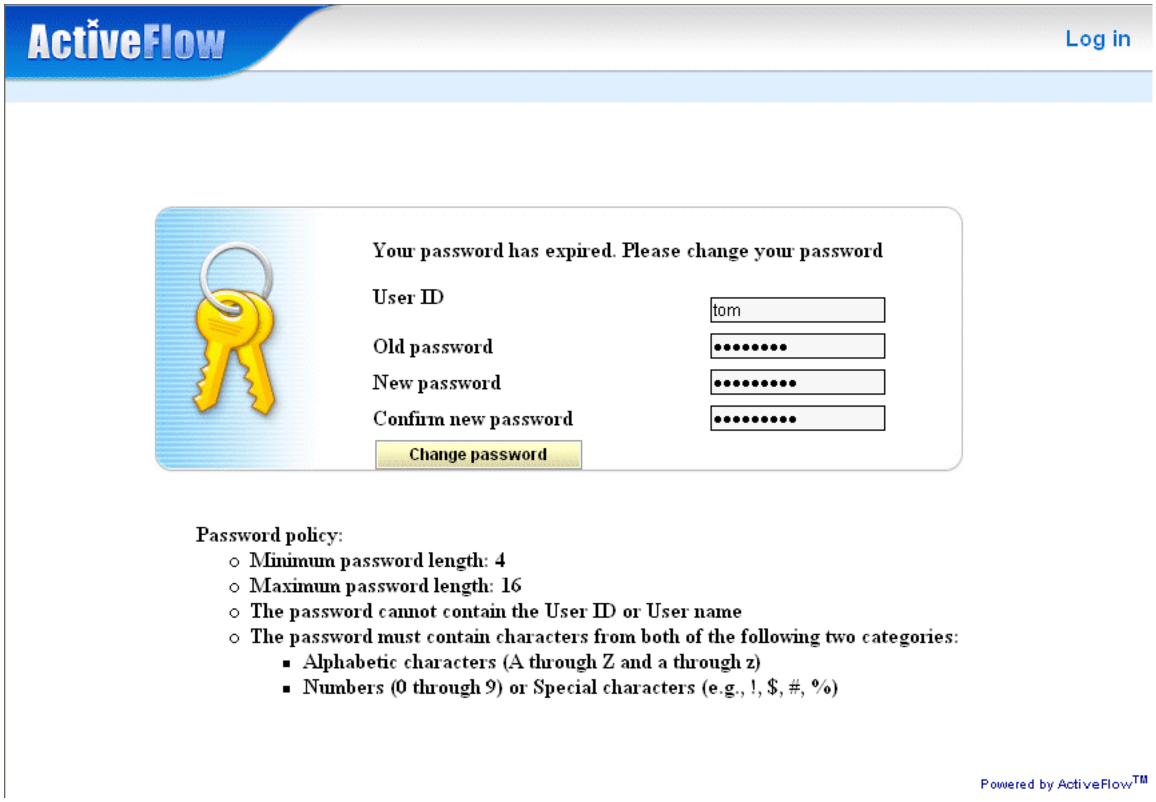
or

The password must contain characters from both of the following two categories:
- Alphabetic characters (A through Z and a through z)
- Numbers (0 through 9) or Special characters (e.g., !, $, #, %)

Session expiration settings: Every time a user logs in into ActiveFlow a new "user session" is created on the server. This session is destroyed when the user logs out from the system using the **"Exit"** button. Leaving the system by closing the browser window will not destroy the sessions created so the ActiveFlow server will destroy the session after a period of session inactivity. **Session timeout** setting determines the maximum period of time a session can live. You can set the living period from 30 minutes to 5 days or to maximum session timeout allowed on the system (10days) by unchecking the **Allow session to expire** setting. Keeping one of the ActiveFlow pages open in the browser will keep the session alive for a period of time equal to the `maximum session timeout` allowed on the system. It is recommended to set a relative short **Session timeout** value (e.g., 1 hour). The default value for session timeout is 1 hour.

When a user tries to Log-in after the password has expired, the user will be prompted with the page below, instead of the standard Log-in page.



The user must fill in another password. Next time the user logs in the regular Login page will be shown and so on until the password will expire again. Of course the user can change the password at any time, as before.

Custom Fields

Custom fields are additional user fields that can be customized for every ActiveFlow implementation.

For example, a company may want to add additional user information like Employee ID and home email address. In this case, the company ActiveFlow administrator can define custom fields named "Employee ID" and "Home email address".

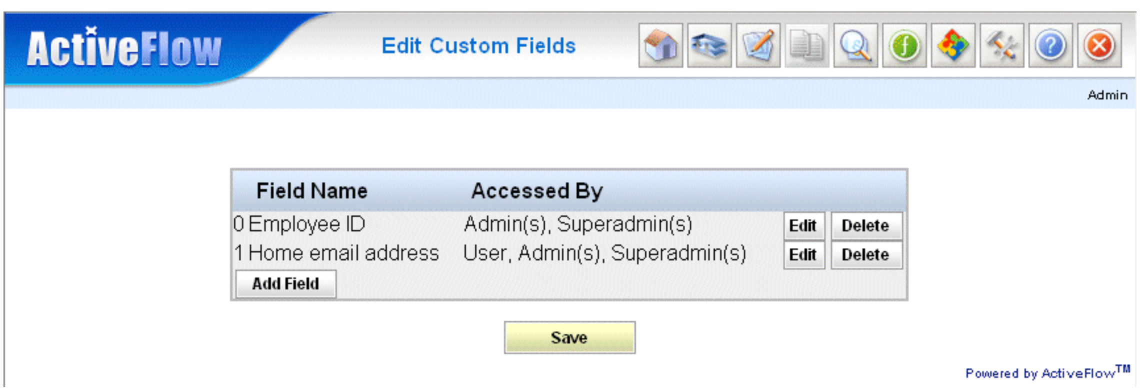
ActiveFlow provides support to add up to 10 custom fields that are related to user records and also provides the following functions:

- an HTML based GUI that can be used to define the labels and access restrictions for the fields
- an HTML based GUI can be used to view and modify values for custom fields
- a set of API functions that can be used by the ActiveFlow developers to access values for custom fields.

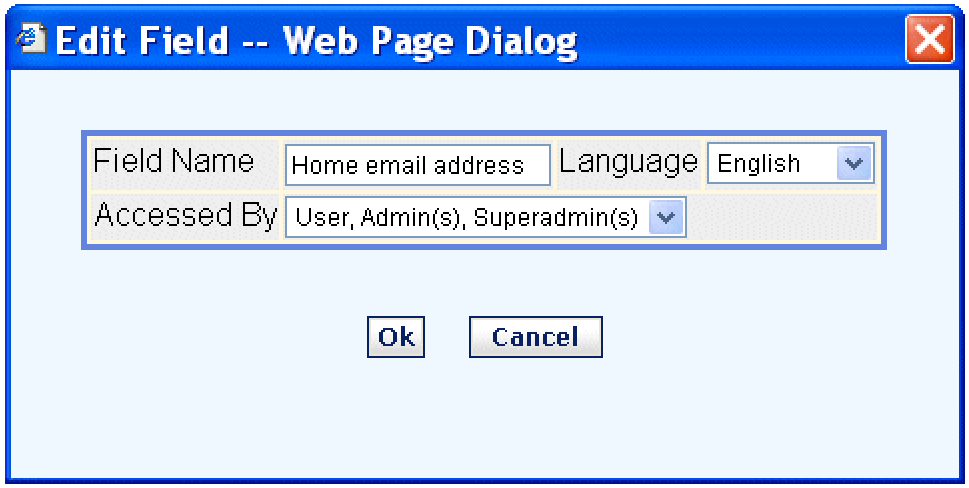
Defining custom fields

A user with superadmin rights can access the "Edit Custom Fields" form where the administrator can:

- Add a Field
- Edit a Field
- Delete a Field



Pressing the "Edit" button opens a form which enables editing of the custom field.



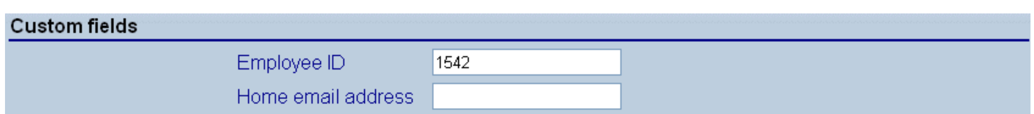
The "Edit Field" form allows editing of the custom field properties:

- Field Name(label) in each language supported by ActiveFlow
- Access rights that can have one of the following values:
    - "Superamin(s)" - means that only users with superadmin rights can view/edit the custom field,
    - "Admin(s), Superadmin(s)" - means that only users with superadmin and/or admin rights can view/edit the custom field,
    - "User, Admin(s), Superadmin(s)" - means that users with superadmin and/or admin rights and the normal user logged on can view/edit the custom field.

Editing values for Custom Fields

After an administrator adds custom fields, the users who have rights can edit the values for custom fields in the Edit User and Add User form.

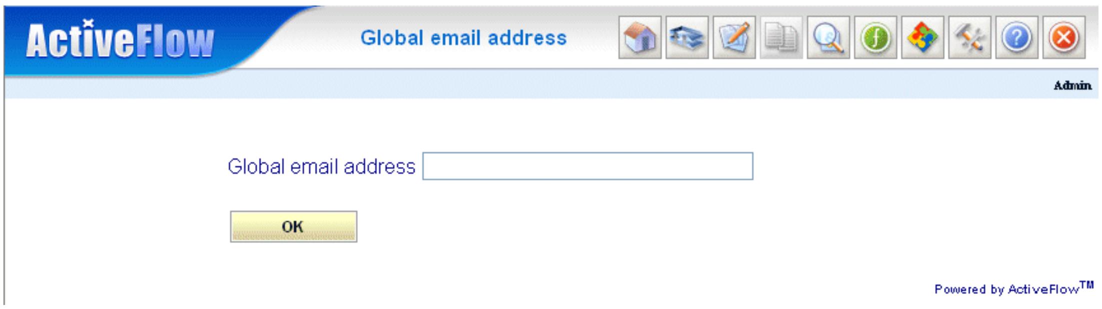
If custom fields are defined, a new section called "Custom Fields" appears in the Edit User, Add User form. This section allows view/edit values for custom fields.



For instructions for using the API for accessing values from Custom Fields see the "ActiveFlow API" section.

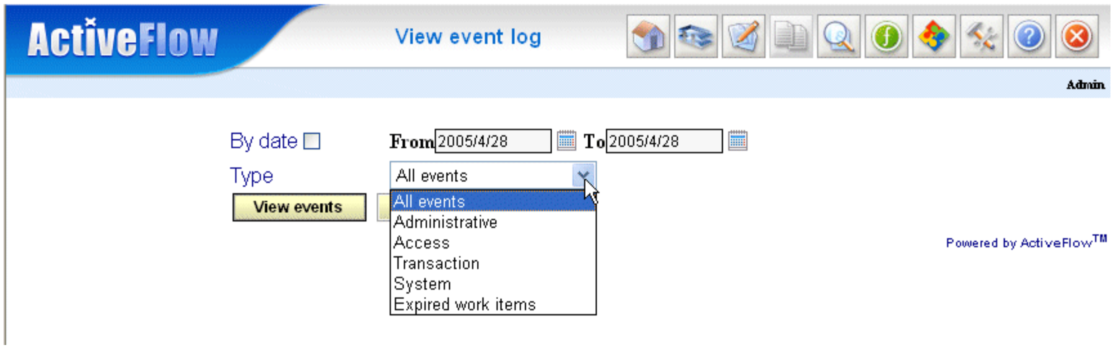
Global Email

This function allows the administrator to specify a default email address for the ActiveFlow send email functionality e.g. in the case of a workflow rejection, a mail is normally sent from the rejector. If the user does not have an email address set in the profile this global email address will be used for the "From" field.
Please note that only users with **Superadmin rights** can access this page.



Viewing the event log

As an audit control, important events that occur while ActiveFlow is being used appear in the workflow event log. Users who have **Superadmin rights** can inspect this HTML form by pressing the **View** events button on the Admin menu.



Since the number of events can become large, the events displayed can be filtered using two criteria:

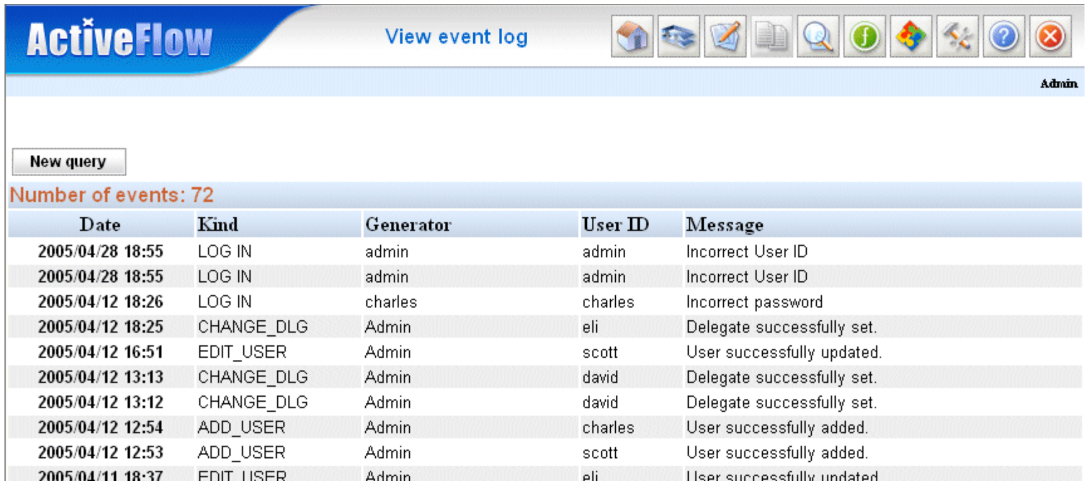
- Filter by **Date**: events occurring during the specified interval will be displayed
- Filter by **Type**: only events that belong to the selected category will be displayed.

The following categories are available in the **Type** list:

Category	Content
All events (default)	All the events are displayed
Administrative	Events occurring from the use of administrative forms (add user, edit user, org. structure, and so on)
Access	All the **log in** and **log out** operations
Transaction	The Retract function and the use of the Emergency tool
System	Includes events generated by the Wizard, mail failure, or candidate errors

The **Date** filter and the **Type** filter can be combined.

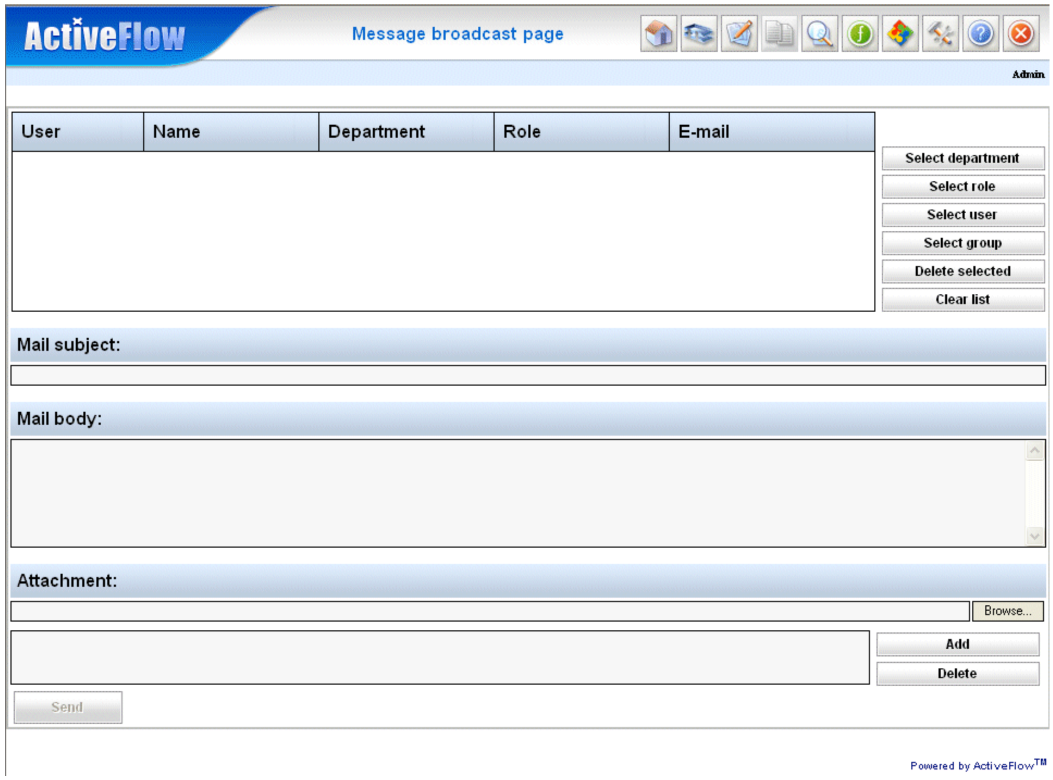
After selecting the filters, display the events that meet the criteria by pressing the **View events** button. The first 10 events that match the criteria are displayed in a table with five columns:



- **Date:** date and time when the event occurred
- **Kind:** The type of event (such as **Add user**)
- **Generator:** the user or the operation that generated the event
- **User name:** the name of the user involved in the operation that generated the event
- **Message:** a short message containing more information about the event.

Message broadcast (Broadcast page)

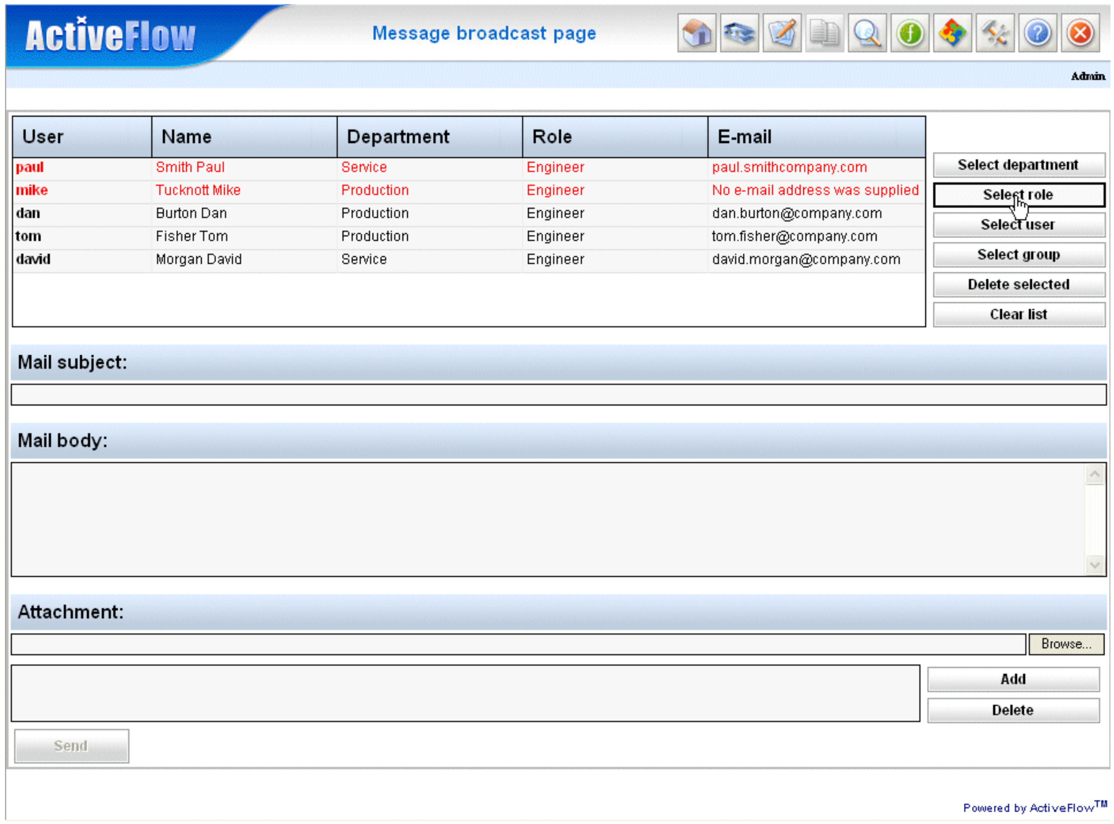
This function allows an Administrator to send an e-mail to ActiveFlow users or groups of users. The Administrator Broadcast page is shown below:



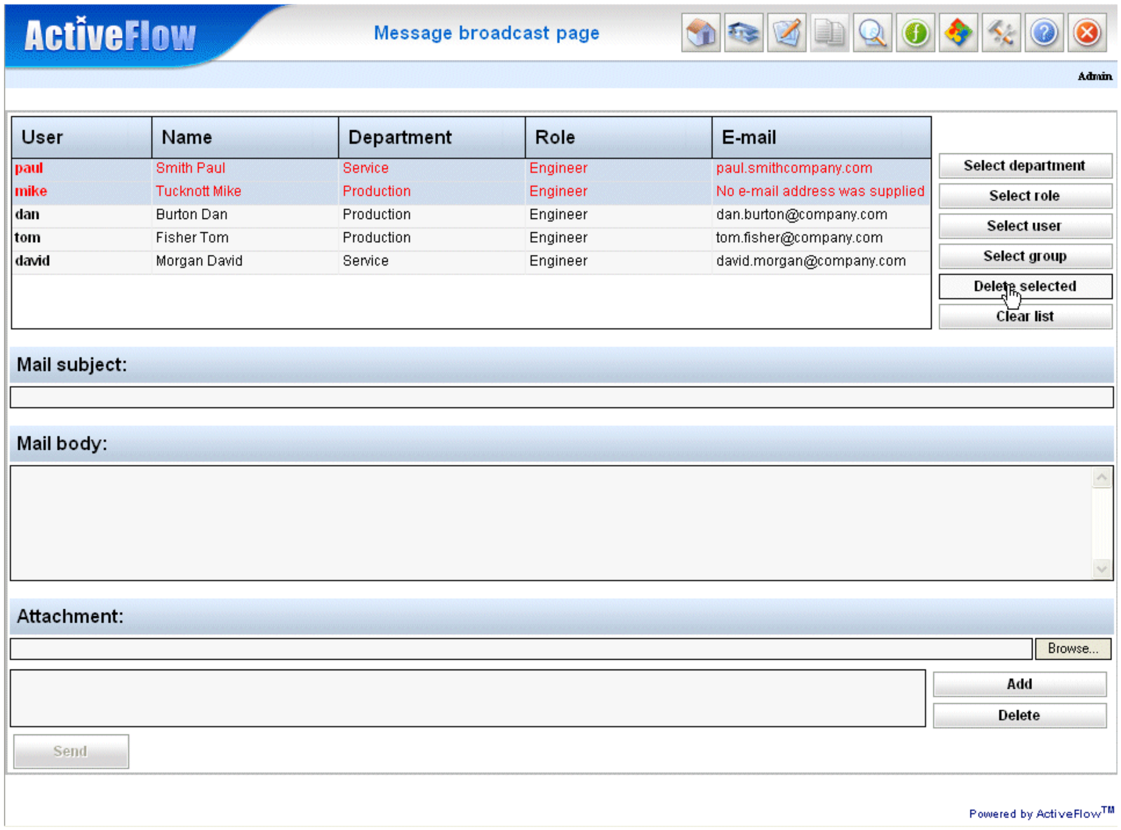
There are 4 options to select the mail recipient(s)

- Select an Individual User using the **Browse user** button
- Select a Department using the **Browse department** button
- Select a Role using the **Browse role** button
- Select a Group using the Browse **Browse group** button

After you have made the selection, a list of User IDs with Name, Department and Role will be shown.



If for example you have used the Role selection criteria (e.g. for engineers), and want to send this mail to all except one or two users, you can delete them from the list using the **Delete selected** button. You can select multiple Users so you don't need to delete them one by one. To select a user, click on the appropriate row. The color of row will turn to blue, then use the **Delete selected** button. To deselect a selected item or items, click again on the selected blue row(s) and the color of row(s) will turn back to white.



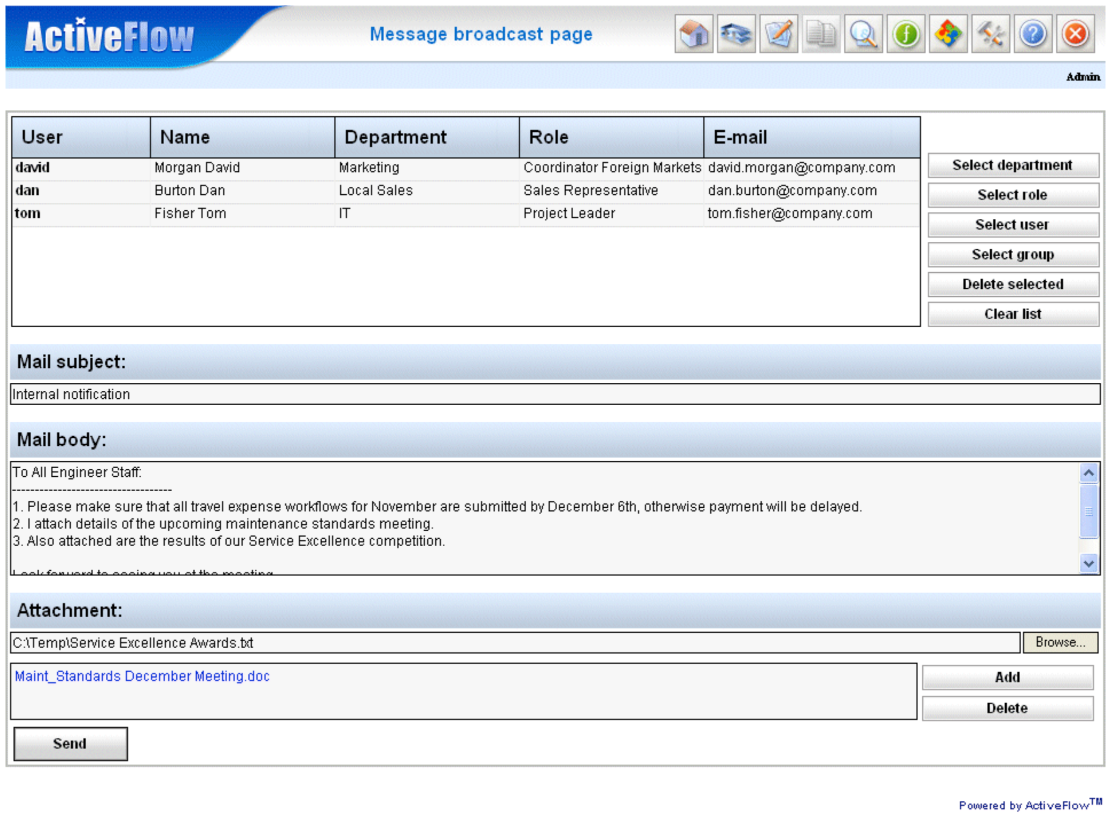
After the selection is made you can delete the entire list using the **Delete selected** button. Also, you can delete the list using the **Clear list** button.

After making the user selection, the next step is to complete the subject of the mail and the mail body itself. These steps are simple because they are the same as using normal e-mail.

You can optionally attach a file or files to your mail. Click on the Attachment **Browse** button, select a file and then click the **Add** button to add the file to the Attachment list. You can repeat this for as many files as you want to attach.

If you have chosen a wrong file, you can delete it from the list. Just select it and then click the **Delete** button.

When the e-mail is ready you can send it by clicking the **Send** button. If successful, you will receive a confirmation message that contains all users who will receive an e-mail (this message has been sent to...).



Important Notes:

1.This mail service uses the BCC (blind carbon copy) e-mail property, so recipients cannot see the other users who will receive the message.

2. You cannot send a message to users who don't have an e-mail address or who have an incorrectly formatted one. These users will be marked with a red color in the user selection list and the e-mail will not be sent to any of the users until these incorrect entries are removed from the list.