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WorkfloPlus Editor User Guide

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OVERVIEW

The **WorkfloPlus (WFP) Editor** enables you to create, edit, save and upload workflows using a simple drag and drop user interface.

A Workflow is your process digitised into a step-by-step template, from which users can create and complete jobs by following the process exactly as required by your business.

The Workflow is built in the **WFP Editor** by dragging, dropping and connecting steps.

Once a Workflow is built, it is then published to the **WFP Dashboard** where a list of all workflows and jobs will be displayed.

The **WFP App** (phone/tablet/HMT) then connects to the **WFP Dashboard** and the workflows can be downloaded and jobs run. As jobs are completed, the data is uploaded back to the server and displayed on the **WFP Dashboard** for review.

This document will guide you through how to create a workflow in the **WFP Editor** and how to upload this to the **WFP Dashboard**.

WORKFLOPLUS SPECIFICATIONS

WFP Apps

- Android 5.0 or higher
- iOS 12 or higher
- HMT-1 / NAV-500 TBD

WFP Editor

- Windows 7.0 or higher
- .NET 4.6.1 or higher

WFP Dashboard

- HTTPS 443
- Browser
 - Internet Explorer 11
 - Microsoft Edge
 - Mozilla Firefox
 - Google Chrome with HTTPS (TLS v1.2 support)
- Web Proxy - configure as required by your enterprise security policy
- Wireless - 802.11 a/b/g/n
- Wired - 10/100 Ethernet port

WORKFLOPLUS

WorkfloPlus converts existing paper-based and human processes into easy to follow, step-by-step digital work instructions accessible via desktop, mobile and wearable computing devices.

A Workflow is your process digitised into a step-by-step instruction template that enables users to create and complete Jobs by following the process exactly as defined by your enterprise.

Workflows are built in the **WFP Editor** by dragging and dropping steps and using connecting lines to define the order of the sequence. Once a Workflow is created it is published to the **WFP Dashboard** where it is accessible as a template for completing jobs.

The **WFP Dashboard** enables you to manage all of your Team's users, workflows, jobs and reports. It stores data captured during jobs for audit and analytics.

WFP Apps connect to the server where workflows can be downloaded. Scheduled jobs are defined, created and completed from the workflows. As jobs are completed on the app, the data is uploaded to the WFP Dashboard and displayed for review.

WORKFLOPLUS EDITOR

The **WFP Editor** enables you to create, edit, save and upload workflows to the **WFP Dashboard** using a simple drag and drop user interface. This guide will give you details on how to create and upload workflows.

WORKFLOPLUS DASHBOARD

The WFP Dashboard stores your Workflows and job data and enables integration into third-party systems. Your login credentials will be emailed to you. As the account owner you are granted administrator rights.

WORKFLOPLUS APPS

The WFP Apps enable you to download and complete workflows as jobs. Once a job is complete, the job is uploaded to the WFP Dashboard automatically.

INSTALL

To install the WFP Editor, run the setup executable available [here](#). The WFP Editor is a Windows Application so if you are using a MAC we recommend that you install [Parallels](#). Once installed, navigate to the **Start Menu** and locate **WorkfloPlus Editor**. You may also wish to create a desktop shortcut for easy access.

CREATING WORKFLOWS

To create, edit and publish workflows, you must have the WFP Editor permissions granted to your WFP Dashboard account. The WFP Editor does not require you to enter login credentials until you upload workflows to the WFP Dashboard.

CREATING A NEW WORKFLOW

- Open the WFP Editor application and select **New Workflow**
- Enter the details of your workflow (these can be changed any time during the workflow creation process):
 - **Name**
 - **Author**
 - **Description**
 - **Directory**
- Hit **Create**.

EDITING AN EXISTING WORKFLOW

To edit existing Workflows, download the Workflow file (.zip format) from the WFP Dashboard. Once you have downloaded the Workflow zip file, select **File >> Import from Zip**. The WFP Editor will open the workflow, and you will be able to make changes to it and then publish an update to the server.

TIP: A list of recent workflows are also available on the main page of the WFP Editor for quick access.

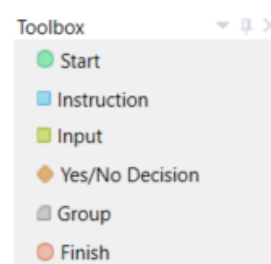
WORKFLOW STEPS

A workflow is created by dragging and dropping step connectors from the Toolbox onto the Editor canvas and connecting each step in sequence to specify the order of the steps.

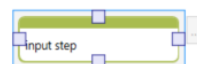


A workflow will always have a **Start Step** and a **Terminator Step** to specify the start and end of the workflow. Workflows can contain multiple **Terminator Steps**.

Begin by adding steps. To do this click and drag a step from the Toolbox and drop onto your canvas.



In between each step draw a connecting line to join two steps in sequence with a connecting arrow. Place your cursor over the step to view its connector nodes (squares).



Click and drag to draw a connecting line by extending its arrow and dropping it onto the step which you are linking to.

Click on the steps and drag to position them on the workflow canvas.



Select a connector node and press delete to remove the connection between two steps.

To edit a step, double click on the step on the canvas and edit its **Properties**. Press the **Complete** button to return to the canvas.


INSTRUCTION STEPS

An Instruction step does not require any input from the user. It displays information that the user must acknowledge. Instruction steps enable you to add a **Step Title**, **Step Description** and **Assets**. An asset is any file type that is supported by the device that the workflow is being executed with.


The **Step Title**, **Step Description** and any attached **Assets** are displayed within the WFP App when a user starts running a workflow and enters that specific step.

RESOURCES

You can add file assets to any step. These will be displayed to the user when they are completing that step in the workflow. You can add files via the **Resources** window and simply drag and drop them into the Asset window on the required step.

Alternatively you can click the **Browse for File Asset**  button and add directly to your step. The **Resources** window will automatically populate with the asset that has been added.

ADD A LINK

As well as adding assets, you can click the **Add Link**  button above the Assets window and enter a URL.

PLEASE NOTE: URL links are not supported on head-mounted tablets eg. HMT-1/NAV-500.

WARNING NOTES

An instruction step, just like any other step, enables you to add a **Warning Note** that displays when a user enters the step.

Click on **Add Note** and write in the warning note.

INPUT STEPS

An Input step supports the same step properties as an Instruction step, but in addition also asks the user to enter an input.

A user will be requested to enter the required input in order to continue through the workflow.

Each input can be further customised with validation options - ie. character limits, numeric range or selection options.

OPTIONAL

Each input step can also be made optional by selecting **Optional** or **IsOptional** check boxes in the step **Properties**.

This means the user has the option to complete the step without an input and will not be given a warning message.

HINTS

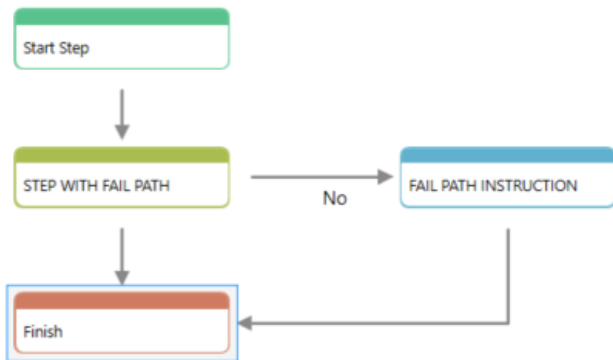
You can also add **Hints** to input steps to guide the user on what type of information needs to be entered.

FAIL PATH

Input steps that allow a user to define a range can also have the option to include a **Fail Path**. Input steps that can accept a **Fail Path** are as follows:

- Numeric
- Text
- Date/Time

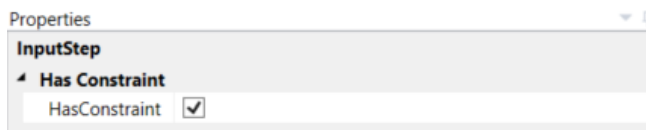
Essentially if the validation fails (eg. the user enters something outside of the predefined range) the user will be taken down a different path in the workflow (the **Fail Path**).



To set the **Fail Path**, enable the **Fail Path** checkbox option for that step and define your range.

Input Step: Numeric, Hint: , Optional: , Fail Path: ☒

This is also shown as a Constraint in the Properties Panel.



In the main Workflow canvas window:

- Hover your mouse over the step where you want to add a connecting line. Typically this is the midpoint of the line. Four square nodes should highlight for each step
- Click to drag and draw a connection line for the Fail Path from one node to another step
- Hover the mouse over the destination step until the square connection nodes appear and finish dragging the line to one of the nodes
- Double-click the connection line to modify the text. Verify that the text is set to No by clicking on the connector arrow and selecting the connection type from the dropdown menu.

INPUT STEP TYPES

BARCODE INPUT

Requires a user to enter a barcode in the input box.

To complete the step, a user can:

- Enter the barcode manually - by entering text in the input box
- Use a barcode scanner - either with an internal device barcode scanner, or a paired Bluetooth scanner
- Click the Scan Barcode button and scan a barcode using the device camera.

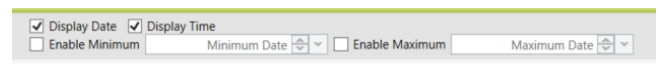
PLEASE NOTE: Radio-frequency Identification (RFID) tag scanning is supported and Quick Response (QR) codes can also be scanned using the camera or barcode scanners.

DATE/TIME INPUT

Requires a user to select a date and/or time from a DateTime selector.

Options include:

- Enabling a Minimum and Maximum date range
- Enabling the Display Date and Display Time check boxes ON or OFF. This controls whether a user must enter the date, time, or both.



NOTE: DateTime input is not supported on head-mounted tablets.

NUMERIC INPUT

Requires a user to enter a numeric value in the input box.

Options include:

- Setting the Minimum and Maximum values for the range
- Quantity buttons which will give the user a Plus (+) and Minus (-) button to adjust the value when completing the job on a mobile device or tablet.

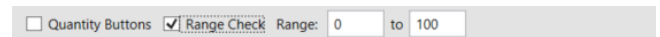


PHOTO INPUT

Requires a user to take a photo or upload an image from their device library. Once a photo is taken, or an image has been selected, it can be annotated using the annotation tool.

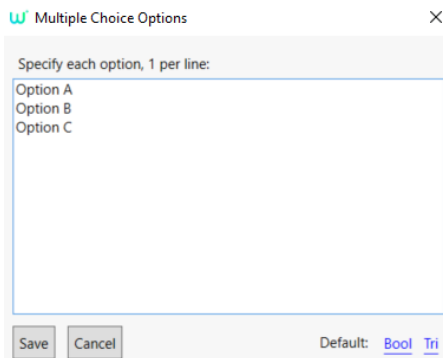
TIP: The user must grant their WFP app permission to access the camera on their device.

TIP: You can take multiple photos on one Photo input step.

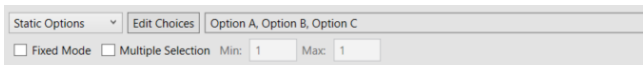
SELECTION INPUT

Requires a user to select items from a predefined list.

Clicking on **Edit Choices** will bring up a box in which you can enter the options to be displayed to the user. Hit return in between each option to create your list.



Selection steps can be defined as single or multiple selection. For multiple selections, you must specify the Minimum and Maximum number of selections a user is required to make to complete the step.



If checked, Fixed Mode displays only the options entered. If this is not checked then the user will have the option to choose OTHER and enter something else.

NOTE: Head-mounted tablets only support Fixed Mode.

SIGNATURE INPUT

Requires a user to enter their signature on the provided signature Pad or type it in manually.

NOTE: Signature input is not supported on head-mounted tablets.

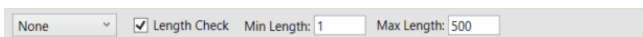
TEXT INPUT

Requires a user to enter text in the input box.

Options include:

- None - accepts any text
- Email - must be a valid email format
- URL - accepts any URL format.

It is also possible to enable a length check for validating.



VIDEO INPUT

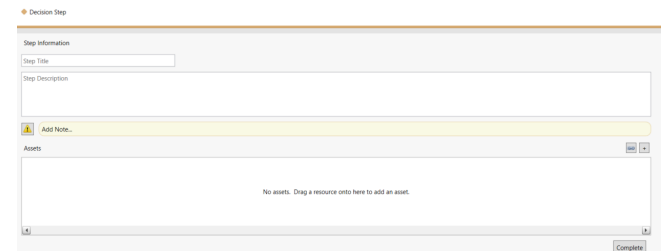
Requires a user to record a video. The step will include a title with instructions and a Record button. The user must press the Record button to initiate video capture.

TIP: The user must grant the WFP app permission to access the camera on their device.

TIP: You can take multiple videos on one Video input step.

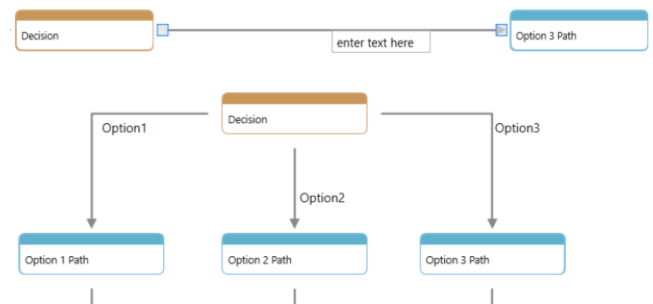
DECISION STEPS

A **Decision Step** supports the same step properties as an **Instruction step**. However, it enables the user to make a decision in order to determine which path in the workflow to go down next.



There are no limits on the number of decision options that a **Decision Step** can have. This means it can have many connectors leading to different steps within your workflow.

To specify which decision should use which path, connect the arrows from the decision step to the relevant steps, and label the connection type by clicking the connector arrow and typing your decision option into the box:

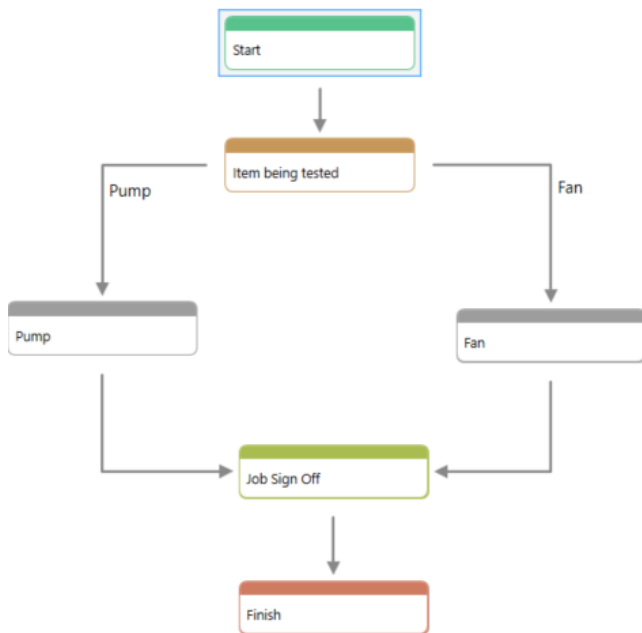


GROUP STEPS

Group Steps enable you to combine steps together to act as an embedded workflow inside of your main workflow. They can be especially useful when building more complex workflows. When creating a workflow, add the group step to your canvas then click on it to open the Group Step canvas in your main workflow.

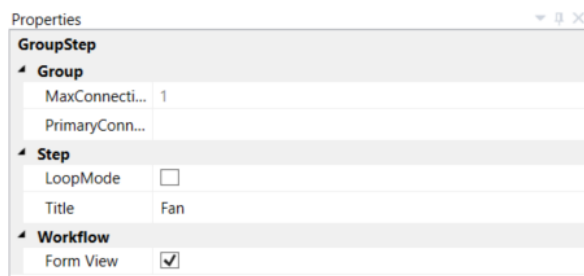


Complex workflows can be created containing several group steps that enable you to address multiple situations in one workflow. Group steps can also be nested enabling you to create workflows that are several layers deep.



FORM VIEW

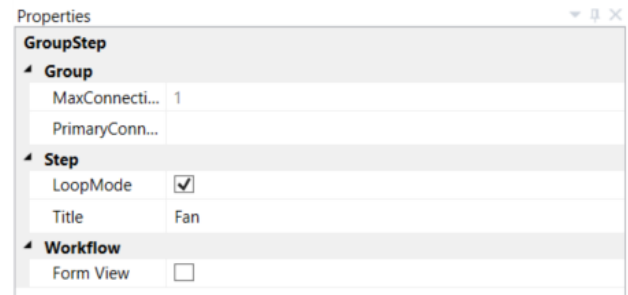
Form View is an option in the Group step Properties that displays all the grouped steps in a list view on the **WFP App**. This means that all of the steps will be shown as a list, and all will need to be completed on the same page. This is useful for grouping and displaying related steps together.



PLEASE NOTE: Form View is not available on head-mounted tablets.

LOOP MODE


If you would like users to be able to submit the form multiple times, select the **LoopMode** option in the properties window. This means that users will have a Next option in addition to Complete which will submit your form and give you a new one to complete instead of proceeding to the next step.



PLEASE NOTE: LoopMode is only available on Android devices and cannot be used on a head-mounted Tablet.

WORKFLOW VALIDATION

In order for the workflow to be successfully executed by WorkfloPlus, it must not contain any errors. When the workflow is validated, the **Errors and Warnings** window at the bottom will list any steps that may need attention.

To validate a workflow press the Validate button at the top: . If the workflow contains errors, a red X will be displayed. The workflow cannot be exported or published until the errors are fixed. The description of an error will give you information about how to fix it.

If the workflow contains Warnings, the steps will have a yellow exclamation mark displayed on them. The workflow can still be published when a step contains a warning. A warning may be displayed if a step does not have a title for example.

| Errors (13), Warnings (0) | | |
|---------------------------|------------------|--|
| ? | Step | Error Message |
| | Start | Only 1 start step is allowed. This step will never be called |
| | Item being teste | Orphan step detected. Make sure it is connected to the workflo |
| | Finish | Orphan step detected. Make sure it is connected to the workflo |
| | (Group) My Gro | Orphan step detected. Make sure it is connected to the workflo |
| | Start | Orphan step detected. Make sure it is connected to the workflo |
| | (Group) Pump | Orphan step detected. Make sure it is connected to the workflo |
| | Start | Orphan step detected. Make sure it is connected to the workflo |

PLEASE NOTE: If a workflow contains errors after you have made corrections, press the **Validate Workflow** button again to update the Error/Warning status panel.

WORKFLOW PUBLISHING

Once a workflow is complete, it is ready to be published onto your WFP Dashboard. You can choose to upload it as a new workflow or update an existing one.

To publish directly to the WFP Dashboard, select **File > Publish to Server** in the WFP Editor. Use your WFP Team Name and credentials to login. You can choose to update an existing workflow from the drop-down menu. Or select to publish a New Workflow.

Alternatively, you can export your workflow to a Zip file by selecting **File > Export to Zip** and save the Workflow zip file locally. This will enable you to upload it to the WFP Dashboard manually.

CONTACT SUPPORT

If you need assistance, please contact support@intoware.com or call +44 (0)115 9778969.