

# Quick Start Guide

Workflow Management - KRYSTAL DMS - Enterprise Edition

# Table of Contents

<b>Workflow Management</b> .....	<b>1</b>
Design Workflow Template .....	2
Create Document Class .....	4
Create Workflow Template .....	4
Manage Participants (Workflow Queues (Roles)) .....	5
Create ACL Template .....	5
Assign Permissions .....	5
Assign ACL Template.....	6

## Workflow Management

Welcome to KRYSTAL DMS – Enterprise Edition, the most advanced and versatile Document Management & Workflow Management System. Over 17 years, Primeleaf Consulting (P) Ltd created KRYSTAL DMS as a most comprehensive and easy to user Document Management Software System.

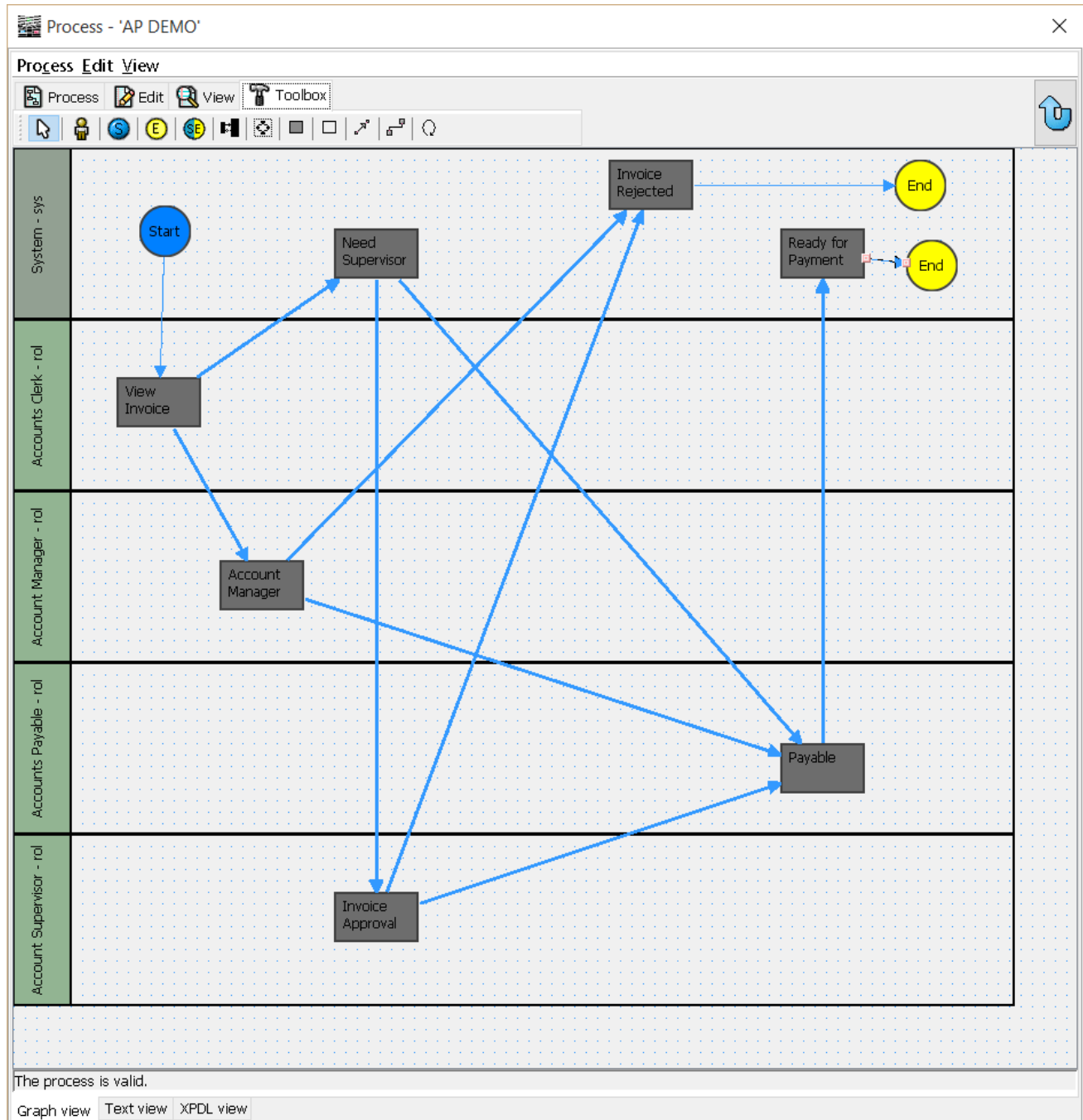
KRYSTAL DMS – Enterprise Edition reflects the suggestions and ideas from faithful users, advancing technology and our commitment to finding new ways to organize and secure your enterprise content, knowledge and document repositories.

This Quick Start Guide is intended to guide you through the process of defining a workflow template and implement the same so that you can start using them easily and immediately.


Thank you for taking a look at KRYSTAL DMS – Enterprise Edition!

## Design Workflow Template

KRYSTAL DMS – Enterprise Edition comes bundled with graphical workflow design tool called Enhydra JAWE (Java Workflow Editor). You can design your workflow processes using this tool.



Please ensure all activities performed by participants (except System) are having start mode as Automatic and end mode as Manual.

 Activity properties - Account Manager Review
✕

General
Tools
Precondition
Postcondition
Simulation information
Extended attributes

General

Id:

Name:

Type: Tools

Performer: Account Manager - rol

Start mode: Automatic ▾

Finish mode: Manual ▾

Deadlines

↑
↓

+ Add
- Remove
✎ Edit



Priority:

Limit:

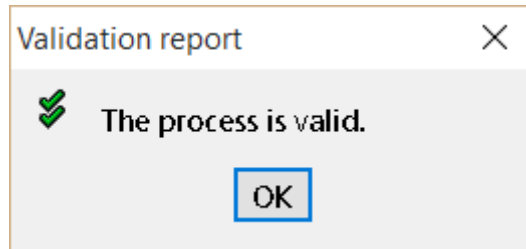
Icon:  ...

Documentation:  ...

Description:

 OK
 Cancel

Please ensure you validate your process before you upload the workflow template (\*.xpd) file to KRYSTAL DMS – Enterprise Edition.



## Create Document Class

Once you have designed the workflow template as mentioned above, you need to create a document class in KRYSTAL DMS. You must login as ADMINISTRATOR user to KRYSTAL DMS – Enterprise Edition in order to create a document class for desired domain.

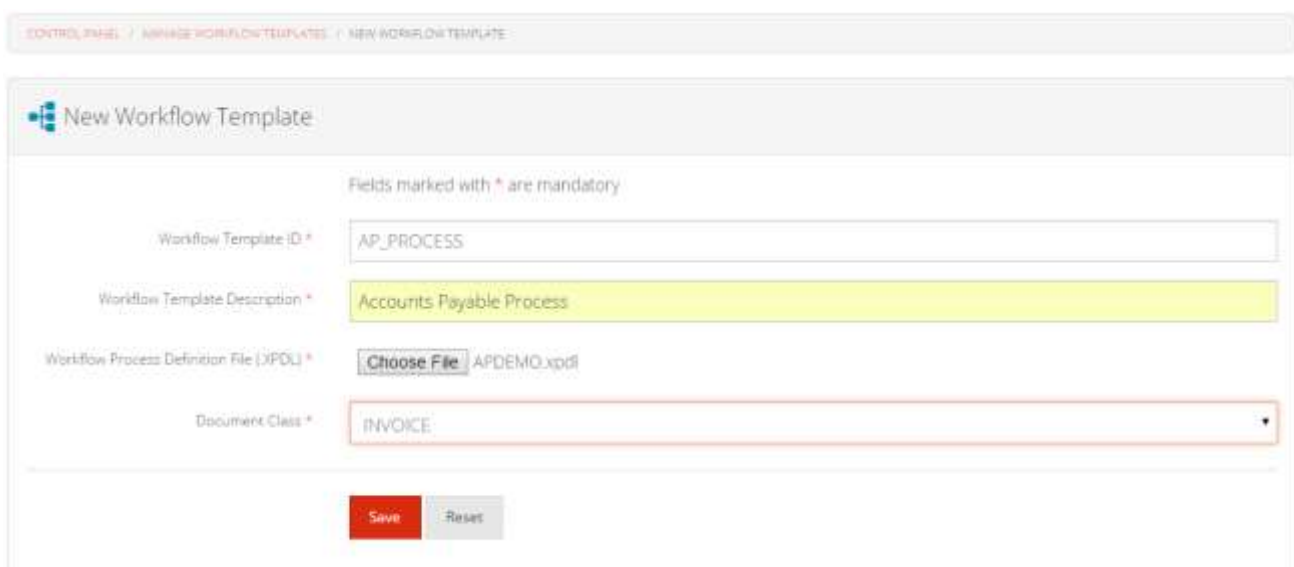
You can use Control Panel -> Manage Document Classes -> New Document Class option available in the system to create a new document class.

Ensure you have all indexes mapped to the newly created document class which will hold the data for the designed workflow.

## Create Workflow Template

You can now upload the XPDL file designed in the earlier step to the KRYSTAL DMS. For this you can use

Control Panel -> Manage Workflow Templates -> New Workflow Template option.



The screenshot shows the "New Workflow Template" form in the KRYSTAL DMS interface. The breadcrumb trail at the top reads "CONTROL PANEL / MANAGE WORKFLOW TEMPLATES / NEW WORKFLOW TEMPLATE". The form includes the following fields:

- Workflow Template ID \***: Text input field containing "AP\_PROCESS".
- Workflow Template Description \***: Text input field containing "Accounts Payable Process".
- Workflow Process Definition File (.XPDL) \***: File selection field with a "Choose File" button and the filename "APDEMO.xpdl".
- Document Class \***: Dropdown menu with "INVOICE" selected.

At the bottom of the form, there are "Save" and "Reset" buttons. A note above the fields states "Fields marked with \* are mandatory".

## Manage Participants (Workflow Queues (Roles))

On successful upload of the XPD file, the workflow template will be created in KRYSTAL DMS. This process will automatically create all desired participants (Roles) in the system if it does not exist in the system already.

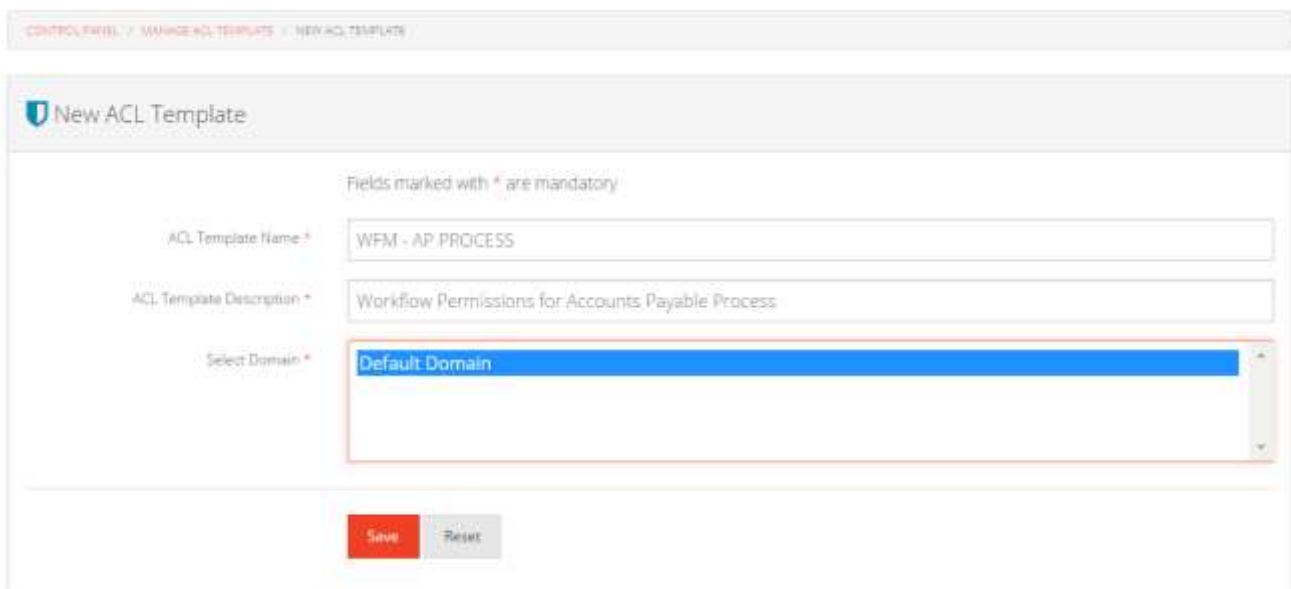
You can use the Control Panel -> Manage Roles -> Edit option associated with each role and assign a desired domain to each role.

You may create additional roles if desired in the system and then you can assign these roles to various users of the system.

## Create ACL Template

Once we have the workflow template and roles defined in the system we can create an ACL (Access Control List) templates to assign permissions.

Control Panel -> Manage ACL Templates -> New ACL Template option can be used for the same as shown below.



The screenshot shows the 'New ACL Template' form in the KRYSTAL DMS system. The form is titled 'New ACL Template' and includes a breadcrumb trail: 'CONTROL PANEL > MANAGE ACL TEMPLATES > NEW ACL TEMPLATE'. Below the title, there is a note: 'Fields marked with \* are mandatory'. The form contains three main input fields: 'ACL Template Name \*' with the value 'WFM - AP PROCESS', 'ACL Template Description \*' with the value 'Workflow Permissions for Accounts Payable Process', and 'Select Domain \*' with a dropdown menu showing 'Default Domain'. At the bottom of the form, there are two buttons: 'Save' (highlighted in red) and 'Reset'.

## Assign Permissions

Now you can assign permissions to roles for this workflow template. Use following option for the same.

Control Panel -> Manage ACL Template -> Manage Permissions (Associated with ACL Template)

Choose roles and assign permission which you desire. All roles must have at least read permissions in order to participate in the Workflow Process.

## Assign ACL Template

Next step is to assign this ACL Template to Workflow Template and Document Class. You can perform this activity by using

Control Panel -> Manage Document Classes -> Edit (Associated with Document Class)

Select the ACL Template and Domains for this Document Class and save changes.

Similarly, you can assign the ACL Template to Workflow Template as well. For this you can use

Control Panel -> Manage Workflow Template -> Edit (Associated with Workflow Template)

WE HOPE THIS QUICK START HAS BEEN HELPFUL IN SHOWING YOU HOW TO GET STARTED USING KRYSTAL DMS – WORKFLOW MANAGEMENT QUICKLY AND EASILY. FOR MORE DETAILED INFORMATION ON HOW TO USE KRYSTAL DMS FOR MANAGING YOUR DOCUMENTS, PLEASE SEE THE KRYSTAL DMS – ENTERPRISE EDITION USER GUIDE AND ADMINISTRATOR GUIDE, BOTH OF WHICH ARE ACCESSIBLE VIA THE KRYSTAL DMS HELP MENU.