




# **ix** PROCESS MANAGER



UNITED PLANET INTREXX XTREME  
RELEASE 4.5







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### Writing Conventions

In this handbook, text passages will be displayed in *italics* when they refer to settings in the displayed dialogs. Menu items that are available in context menus can, in addition, always be selected from the main menu. Main menu items will not be described if they are not available in the context menu. A description of the general main menu items can be found in the  *Center* handbook. Programming code in the text will be displayed in the Courier font. Context menus can be opened by clicking with the right mouse button on the described element.

In the following, *<xtreme>* refers to your Intrex installation path; under Windows, for example, this is usually  *C:\xtreme\*. On Linux, the normal install path is  */opt/xtreme/*. The following symbols will be used for designation of special kinds of information:

-  Important information
-  Tips and background information
-  References to additional information in an Intrex Xtreme handbook
-  Directories
-  URLs
-  Buttons in dialogs or assistants

### Previous Knowledge

To understand this document, no special previous training is required. You can find supplemental information in the handbooks  *Application Designer* and  *Center*.

**1. Introduction**

Business processes will be automated in the Process Manager. The Process Manager reacts to changes made to the database by applications. The data in an application can also be changed according to defined criteria. With the help of time-controlled actions, reminders upon the passing of a deadline and the delegation of tasks to assistants can be automatically executed.

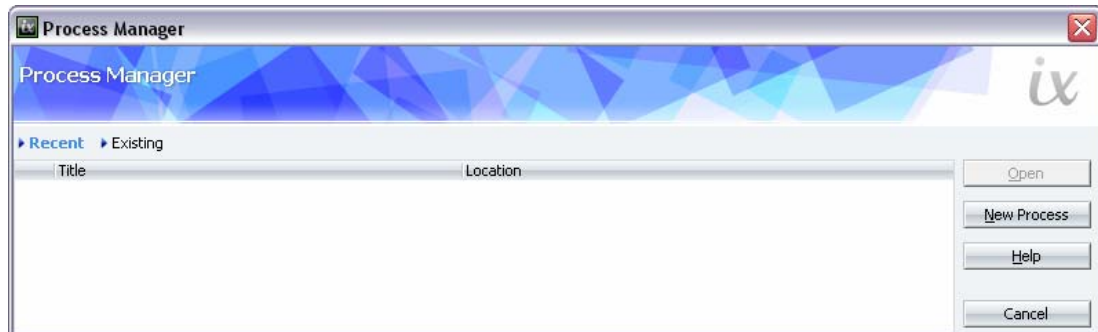
The Process Manager is opened from the module bar in the Portal Manager.



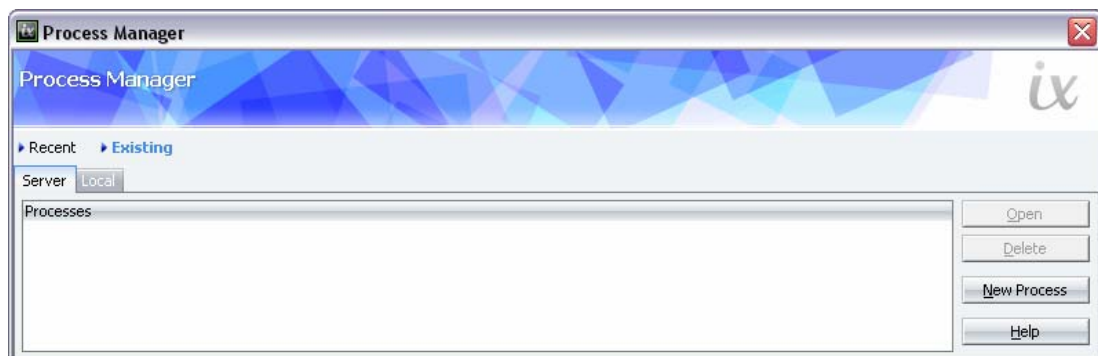
If you are not already logged onto a portal, the dialog for login will be shown. Select the desired portal and log on.

**2. The Process Manager**

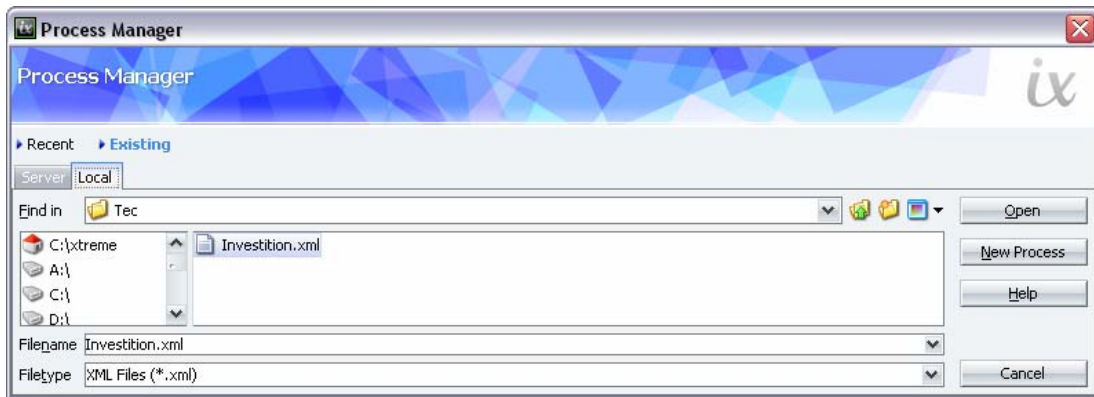
After login the most recently edited processes will be listed, and can be selected and opened for further editing.




Clicking on Existing will switch to the Server tab.



All processes saved on the server will be shown here. An existing process can be deleted by clicking Delete. On the Local tab, all processes saved in a local or network directory will be shown.

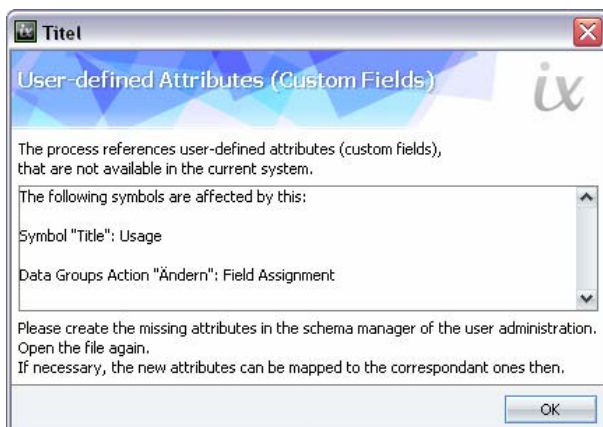


You can enter a new process by clicking on  *New Process*.


### 2.1. User-defined Attributes (Additional Fields)

When opening processes from another source portal, references to user-defined attributes in the User Manager of the original portal must be taken into account.

If the user-defined attribute is not contained in the User Manager of the target portal, a message will be output, noting that the missing attributes must be entered in the Schemes Manager in the User Manager belonging to the current portal.

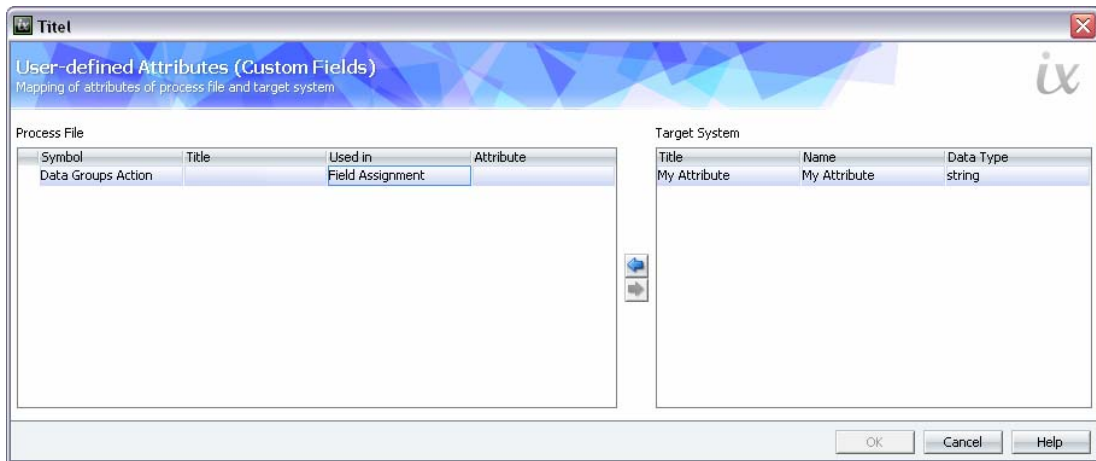


In this case, please cancel the opening of the process and enter the missing attributes.

 If you use the table name of the attribute from the original portal, the new and old attribute will be automatically assigned upon import.

You can find information on this topic in the  *User Manager* handbook. Afterwards, the process can be opened again.

If user-defined attributes exist in the User Manager of the target portal, you will be given the ability in the following dialog to assign the attributes from the original portal to the attributes in the target portal.

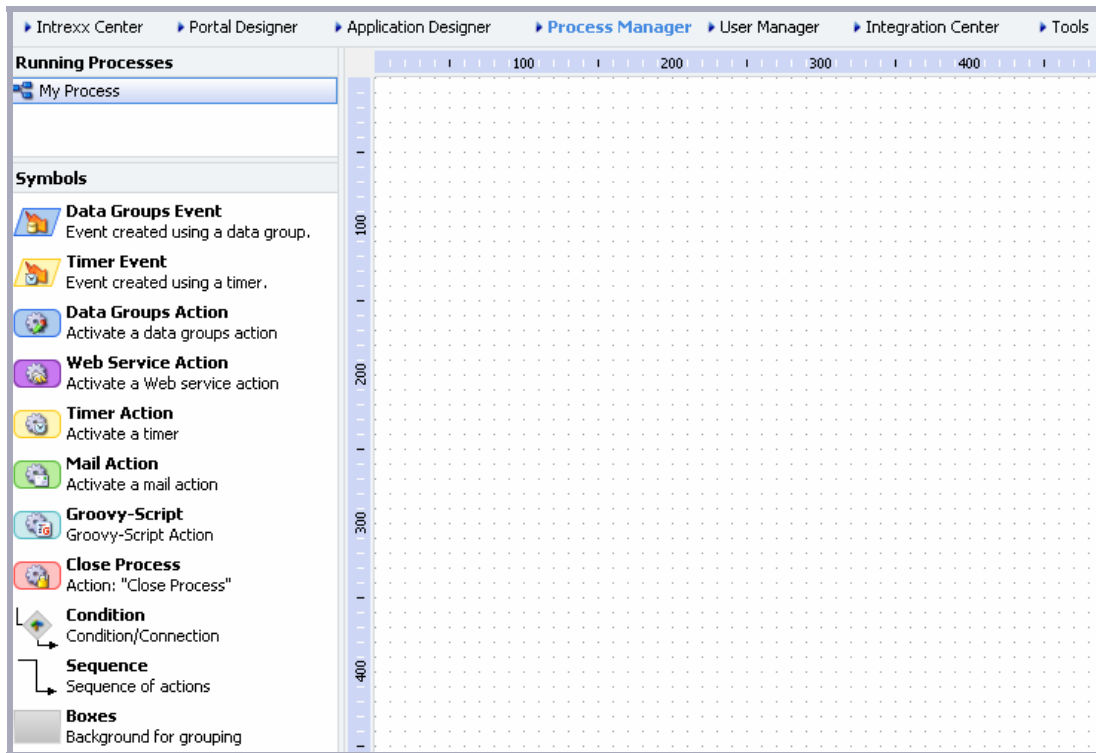


**3. The Areas of the Process Manager**

In the Process Manager, two view modes are available, which you can switch between using the *View* menu.

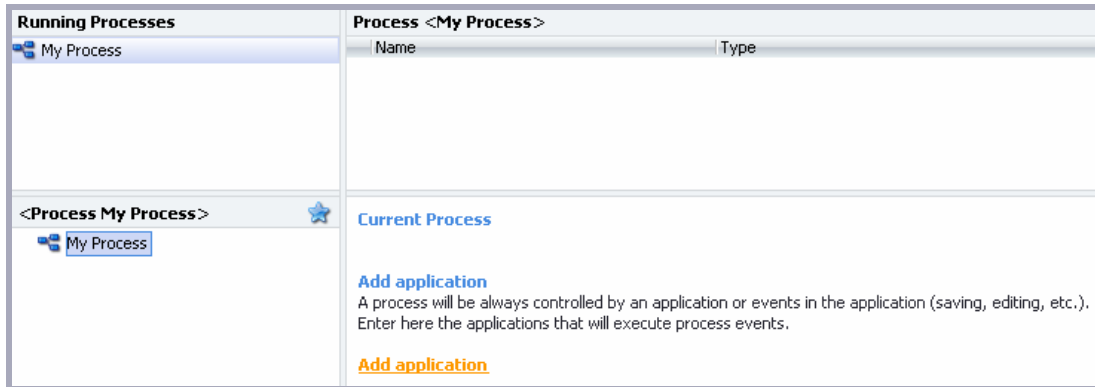
**3.1. Diagram View**

The module is subdivided into three areas.



In the *Running Processes* area, the currently opened process will be shown. In the *Symbols* area, you will see symbols for the process elements, which you can drag onto the workspace in the right-hand area in order to represent the process.

### 3.2. Simple View



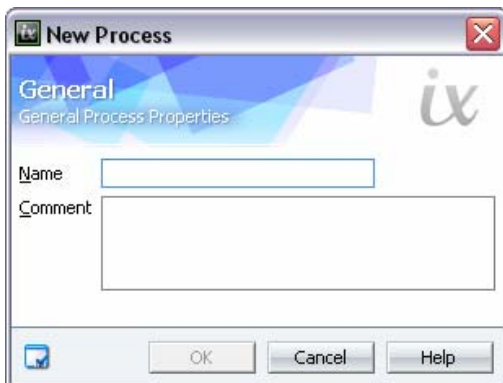
In this view mode, the construction of the process will be shown in the lower left-hand area in tree format. If you click on an element, its corresponding properties will be shown in the right-hand area. Additionally in this view, tips will be shown in the lower right area of the screen, in which the actions available, depending on the existing process element selected, will be shown in the form of links.

## 4. Main Menu

### 4.1. File Menu

#### **New process**

Selecting this menu item will create a new process.



Enter the name of the new process in the *Name* field. Under *Comments*, a short description can be entered. When you are done, click *OK*.

#### **Open process**

With this menu item, the existing processes will be listed.

#### **Save process on server**

Save a process on the server. A process saved on the server is active and will be executed.

#### **Save process locally**

Save a process locally, without activating it.

#### **Close process**

Close a process. The process will remain active.

#### **Export as Graphic**

This menu item allows the diagram view of a process to be exported as an image file.

#### 4.2. Edit Menu

##### **Edit**

Open the properties of the currently highlighted element.

##### **Delete**

Delete the highlighted element.

##### **Text Alignment**

The labels for sequences and conditions can be automatically aligned horizontally or vertically here.

#### 4.3. View Menu

##### **Show / Hide Hints**

Show or hide hints in the simple view.

##### **Show Ruler**

Show or hide the ruler on the workspace.

##### **Refresh**

Refreshes the open process. If changes have been made in other modules in the meantime, such as a new data field having been created in the Application Designer, *Refresh* will bring the process to the newest version.

##### **Simple**

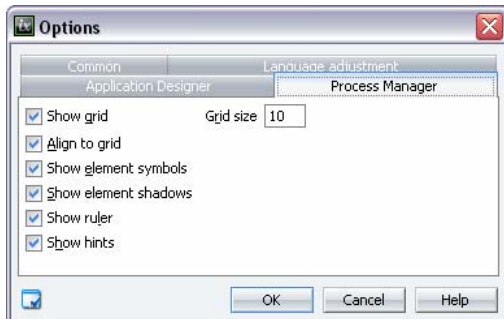
Turn on simple view mode.

##### **Diagram**

Turn on diagram view mode.

#### 4.4. Extras Menu

##### **Process Manager Options**



Clicking this menu item will take you to the *Options* dialog. On the *Process Designer* tab, various general settings may be selected.

The *Show Grid* setting will display a grid pattern in the Application Designer. The grid size (the distance between grid points on the workspace of the Application Designer) can be defined here. The default value *10* corresponds to a distance of 10 pixels between individual grid points.

The setting to *Align to Grid* will orient the graphical elements in the diagram view along the bars.

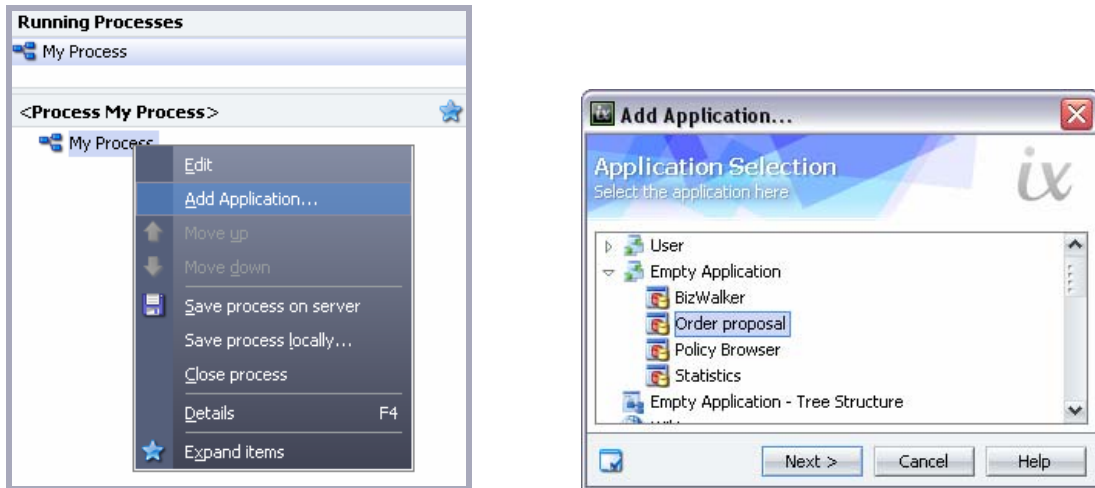
The setting to *Show Element Symbols* will show or hide the small symbols that are shown at the bottom of each process element on the workspace. The setting to *Show Element Shadows* will show or hide shadows for each process element placed on the workspace.

*Show Ruler* will show or hide the ruler on the workspace.

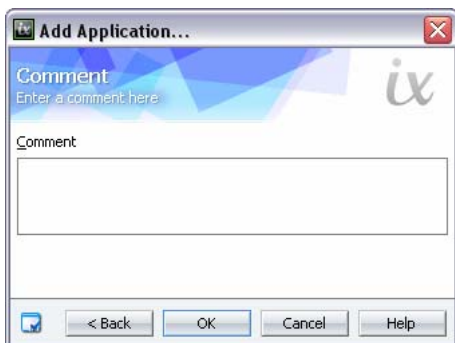
*Show Hints* will show or hide the hints in the lower right-hand area in the simple view of the Process Manager.

**5. Add Application**

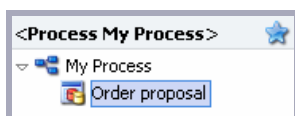
A new process in the *Simple* view will be first assigned a relevant application. If you set up a process, for example, that will send a notification via eMail for investment requests of €100 and above to a manager, you will add the *Investment Request* application to the process. Click on a process with the right mouse button and select the context menu item *Add application*.



In this list, all applications will be listed, grouped by template. Click on the ▶ arrow symbol in front of the name of the template type in order to show the applications contained within. Select the application there that you wish to add. To continue, click ➡ *Next*.

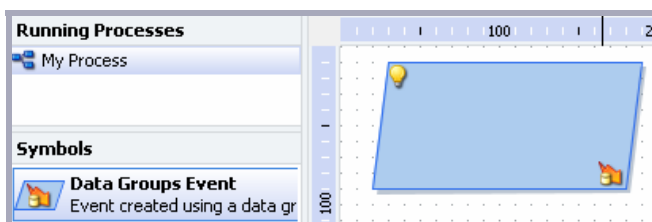


Comments can be entered here. To finish, click ➡ *OK*.

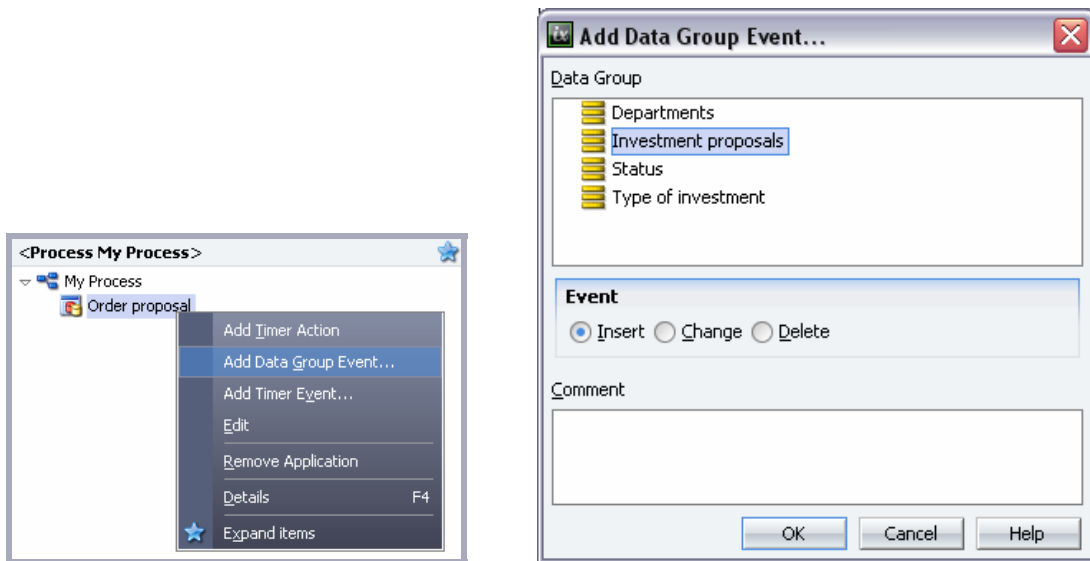


**6. Data Group Events**

In the diagram view of a process, you will define the connected application at the same time a data group event is created. Highlight the data group event in the toolbox and drag it onto the workspace.

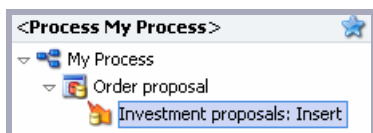


Double click an event to edit its properties. Next, select the application, as described in the previous chapter. The following steps are identical with those in creating a data group event in the simple view.



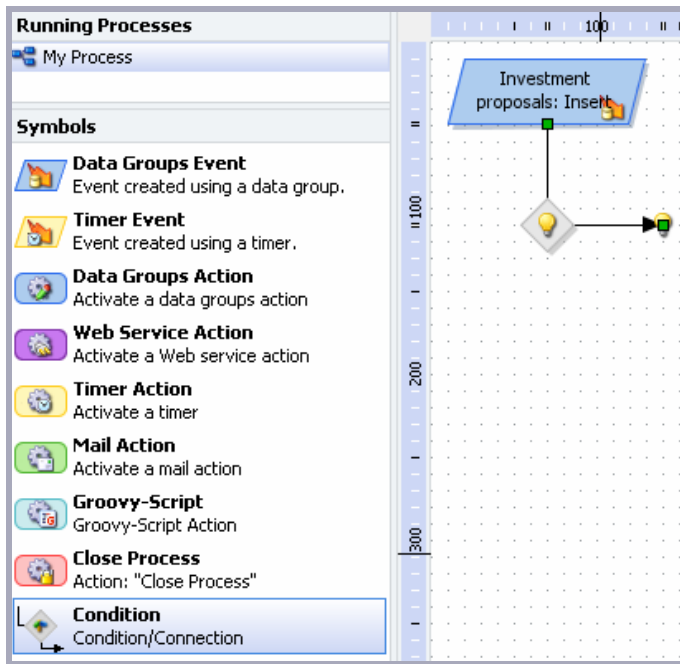
With a data group event, you will define a data group in which the event will occur, to which the process will react. Click with the right mouse button on the application and select *Add Data Group Event* from the context menu.

Select the data group in which the event occurs, which will set the additional process in motion. Then select the type of data record event. The *Insert* setting will execute the additional process if a data record is added to the selected data group. *Change* will execute the selected process if a data record is edited. *Delete* will execute the additional process when a data record is deleted. A *Comment* can also be entered here. After clicking *OK*, the data record event will be created.

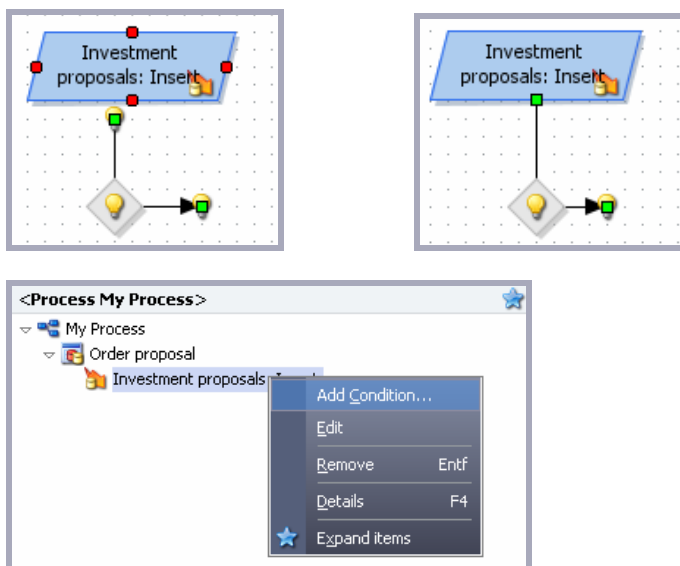



**7. Condition**

Conditions will be used for the restriction of subsequent events. In the diagram view, you can select a condition from the toolbox and insert it into the workspace.



Conditions can be connected to a data group event or a timer action (see chapter *Timer Action*). To do so, highlight the condition in the toolbox and drag the element to the workspace. Move it then onto the element with which it will be connected. Handles for dragging the data group event will be marked in red. The condition will be connected with the data group event as soon as you release the mouse button. The properties of the condition can be edited by double-clicking on the element.





In the simple view you can expand and collapse the process tree by clicking the  star-symbol. Select a data group event or a timer action (see chapter *Timer Action*) and select *Add Condition* from the context menu.



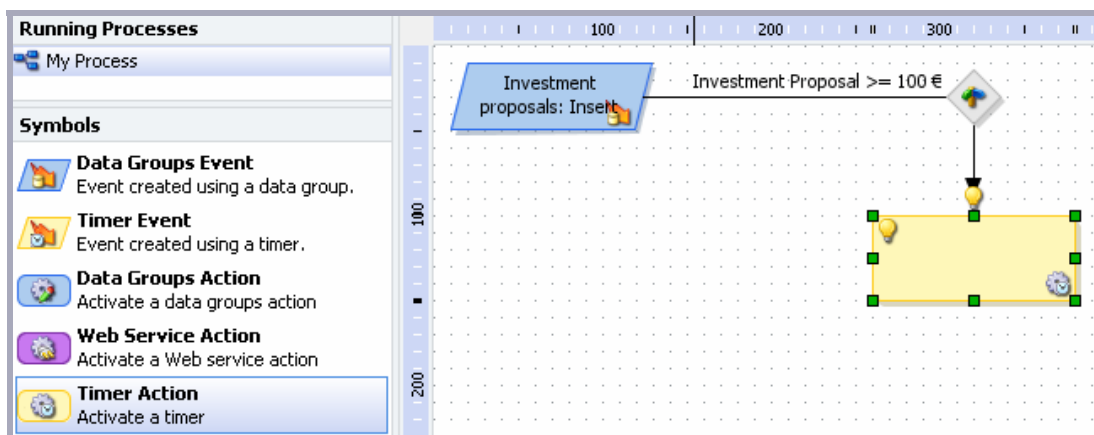
With the *Always* condition, the condition will be valid for the parent event without restriction. With the *Filtered* condition, the execution can be restricted by specific additional conditions.



In the next dialog, a filter can be defined by clicking  *Add*. Information on this topic can be found in the *Application Designer* handbook. To complete the creation of the filter, click  *OK*.

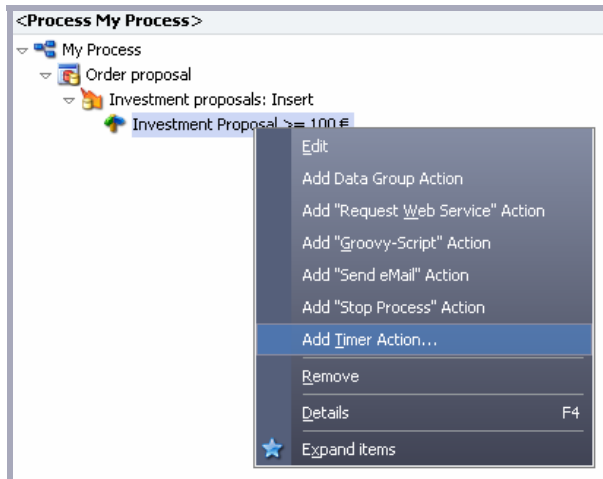
## 8. Timer Action

In a timer action, you can define the point in time a timer event will be executed.

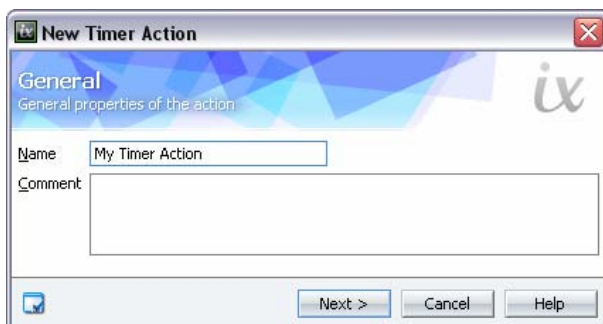


A typical task for the use of a timer would be a repeating reminder for tasks. A timer action can be connected with three elements in the diagram view, or in the simple view can be entered on three levels:

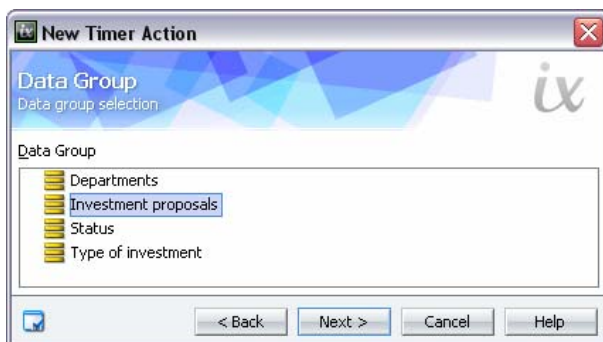
- Under an application
- Under a condition of a data group event  
(Timer action will be started after the data group event occurs, and is coupled with exactly one data record, such as 3 days after the insertion of a data record)
- Under a condition of a timer event  
(Timer action will be started after the timer event occurs, and is coupled with exactly one data record, such as 3 days after the timer event occurs).



In order to insert a timer action in the simple view, highlight an application, a data group event or a timer event, and select *Add Timer Action* from the context menu. Enter a *Name* and a *Comment* here.



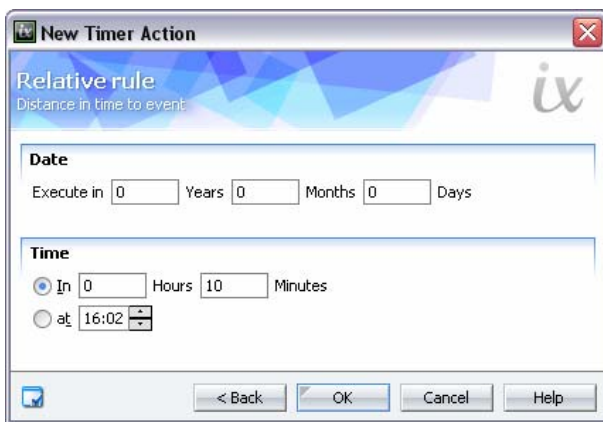
If a timer action is entered directly under an application, a data group from the application can be selected in an additional dialog.



Click *Next*. In the next window, the execution time for the timer action will be defined, if you have entered the timer action under an application. If the timer action is entered under a condition, the timer type will now be defined.

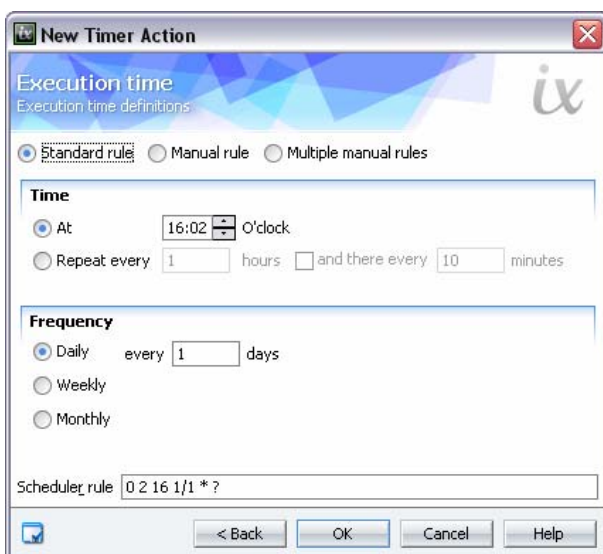


Select the *Relative Timer* setting if you wish to define a one-time event relative to the execution time. Select the *Absolute Timer* setting if you wish to define a repeating event or an event that occurs at a specific point in time. To continue, click *Next*. With the selection of a *Relative Timer*, you will now be placed in the dialog to set the relative rule.



Here you can enter in how many *Years*, *Months*, and *Days* the timer action will be executed. Define the *Time* in the field below or enter in how many *Hours* and *Minutes* in relation to the current time it will be executed. When you are done, click *OK*.

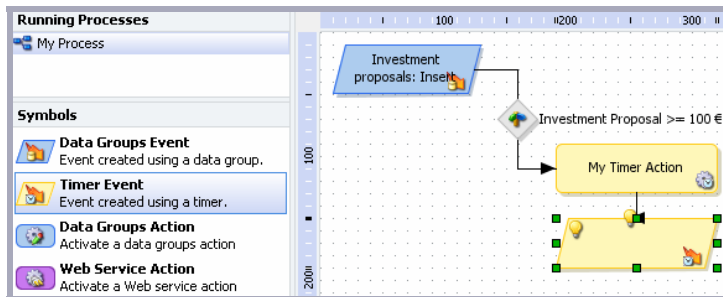
If you have selected an *Absolute Timer*, you will now reach the dialog to set the execution time.



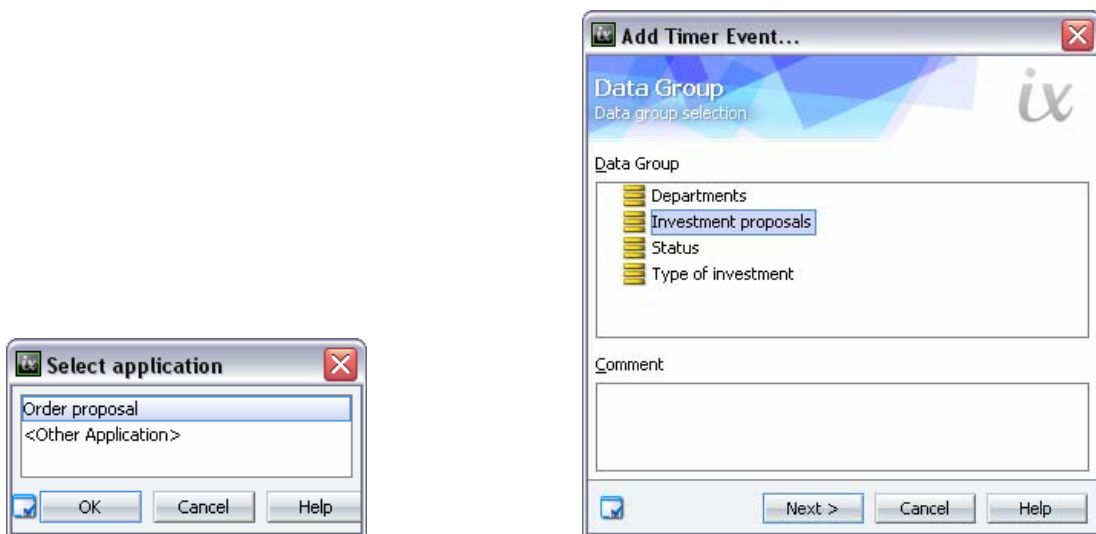
You can find a description of possible settings in the *Integration Center* handbook, chapter *BizWalker*.

9. **Timer Event**

A prerequisite for a timer event is an existing timer action. In the diagram view, a timer event must not be connected with the corresponding timer action using a sequence. The assignment will be defined under the timer event's properties.



Timer events can be created directly under an application in the simple view. They will be executed when a timer action that is linked to a timer event is executed.



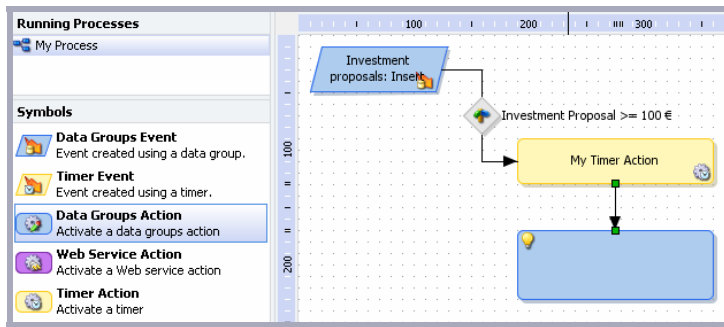
Select here the application and the data group in which the event occurs, to which the event will react. To continue, click ➡ *Next*.



Click ➡ *OK* to insert the event.

10. **Data Group Action**

With a data group action, data records in a data group can be written, edited, or removed as a reaction to specific events.



Data group actions can be executed in the diagram view via a sequence to a condition. In the simple view, select the context menu item *Add data group action* for a condition.

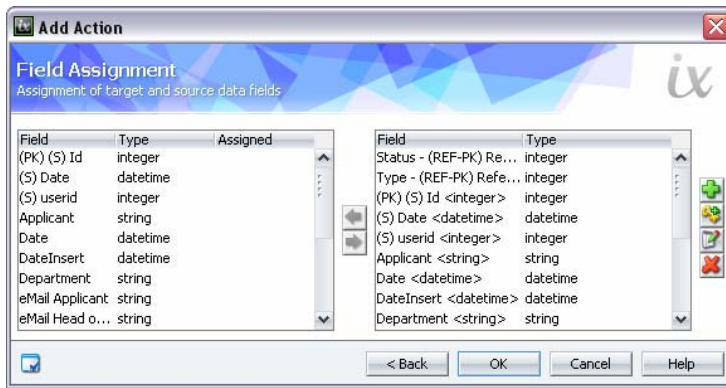
Enter a *Name* for the data groups action here. A descriptive comment may also be entered. Next, select the desired action. With the action *Add data record*, a data record will be added to the target data group. The action *Change data record* will change a data record in the target data group. The *Delete data record* action will delete a data record in the target data group. With the setting to *Activate subsequent events*, you can decide whether a data group event can be executed in the target data group as well.



Example:

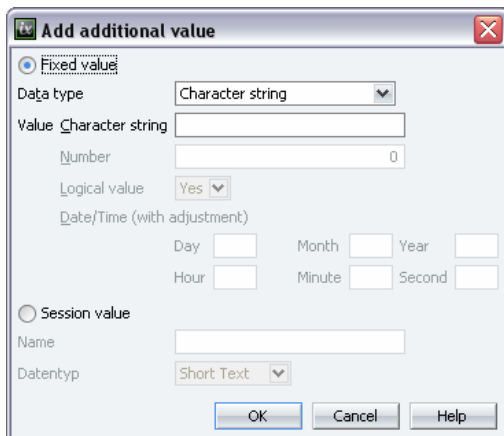
*Data group A* contains a data group event, which upon the entry of a data record, writes a data record to *Data group B*. If *Data group B* also contains a data groups event that, upon adding a data record, writes a data record to *Data group C*, the data groups event in *Data group B* will only be executed if the option to *Activate subsequent events* in *Data group A* has been activated. Please note that the setting to *Activate subsequent events* can also create unintended infinite loops.

Click *Next*.

Select the target application and data group here. Click *Next*.




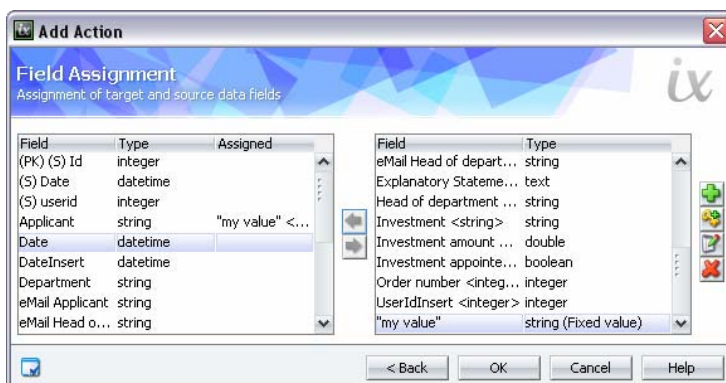
Assign the fields of the source and target data group with the help of the  arrow buttons, whose values will be written to upon execution of the data group action in the target data group. By clicking , a static value will be created, which can be written to a data field of the target data group each time the data group action is run.



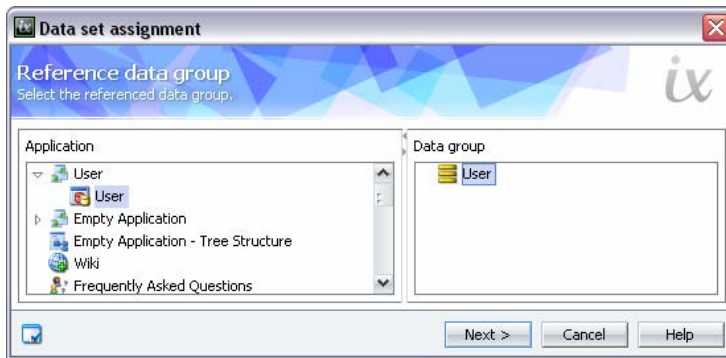
Select the desired *Data type* (character string, number, logical value, date/time). Enter the static value into the *Value* field. In the *Value* field, enter the fixed value.

With the *Session value* setting, the value of a session variable can be inserted. To do so, enter the correct name of the variable in the *Name* field and select the data type from the selection list *Data Type*.

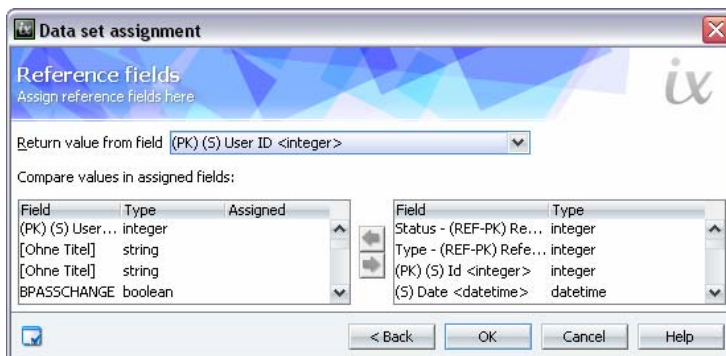
After clicking  *OK*, the new, static value will be able to be selected from the source data group, and can be assigned to a data field of the target data group.



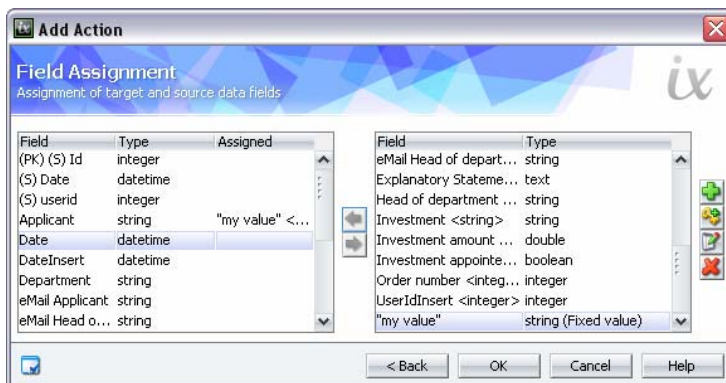
By clicking , a foreign key can be created.



Select the application and data group here that contains the foreign key, then click *Next*.



In the selection list *Return value from field*, select the data field of the reference data group that will be contained in the foreign key. Assign the fields from the reference and source data group with the help of the arrow buttons whose values will be compared. To continue, click *OK*.



By clicking *Edit*, the dialog to edit a fixed value or a foreign key will be opened. Clicking *Delete* will delete a fixed value or foreign key.

**11. Web Service Action**

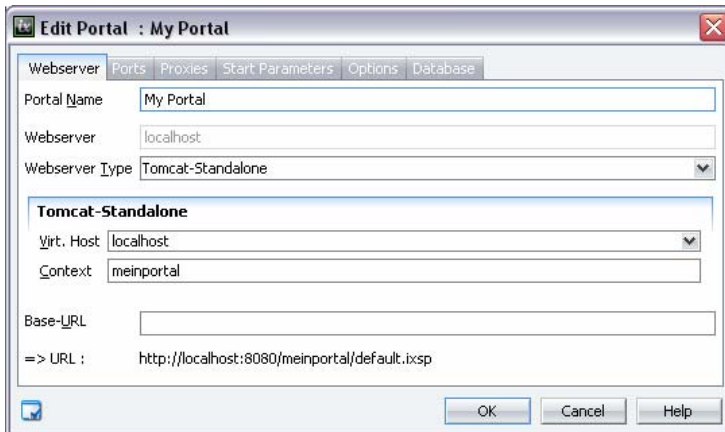
A web service request can be executed as a result of a condition. You can learn how to configure web service calls in the handbook *Web Services*.

**12. "Send eMail" Action**

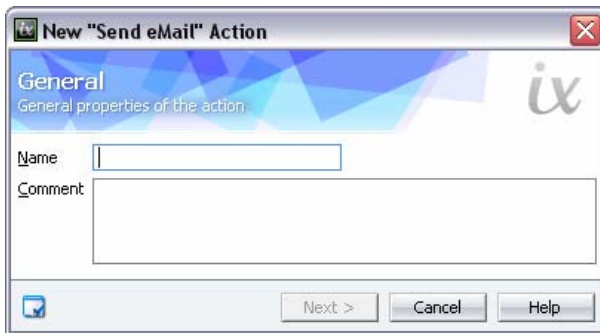
With this action, notifications can be sent via eMail when specific events occur. To use this function, the SMTP service must be set up in the Intrexx Xtreme Tools module. Information on this topic can be found in the *Tools* handbook.

In order to send eMails with links to portal pages via the process, the *Base-URL* field in the portal properties must be filled with the basis URL of the portal (such as

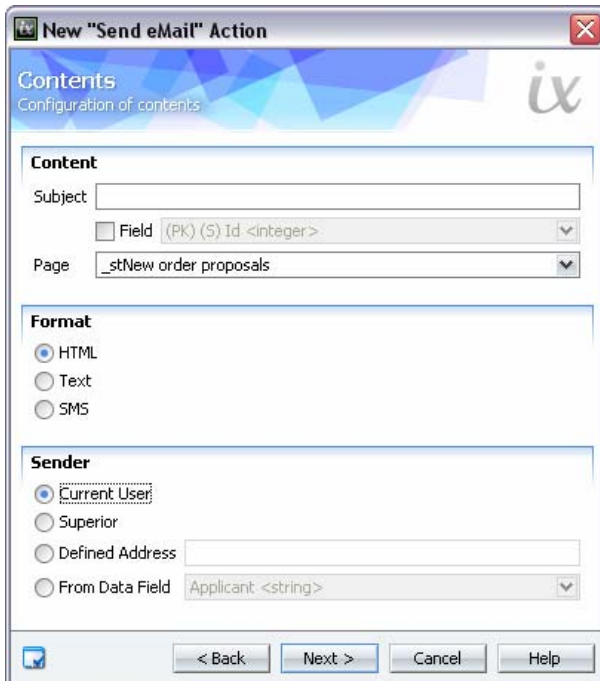
`http://guitarstore/`). You can reach the portal properties from the *Intrexx Center* module or via the menu item *Portal / Portal properties*.




The *Send eMail* action can be added as a condition via the context menu.



Enter a *Name* and a *Comment*. To continue, click  *Next*.

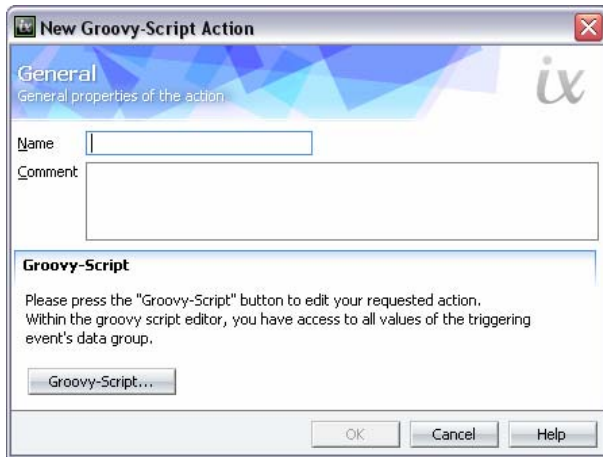


A description of the settings, including the following dialogs, can be found in the  *Application Designer* handbook.

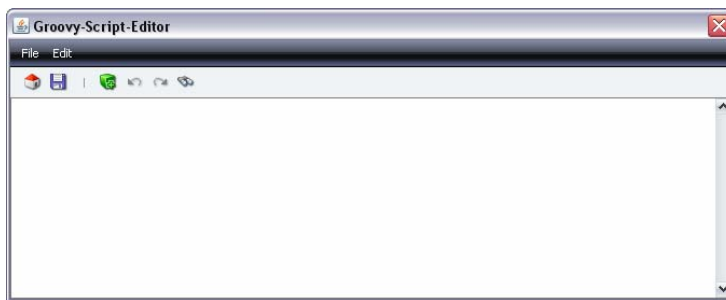
### 13. "Groovy-Script" Action


In order to structure Intrex applications in an even more flexible manner, you have the ability here to integrate Groovy script into your processes. Groovy has the property of being better integrated as most other script languages into the JVM. Existing libraries or Groovy objects and classes in Java can be easily used in this way.

A Groovy script action can be entered to a process after a condition.



Enter the *Name* of the script here. Click  *Groovy Script* to open the editor, in which the script can be composed.




Clicking  *Insert data field* will open a list, with all data fields from the application in which you have inserted the process in it.



Select the data field that you want to use in the script. The following programming code will be inserted into the script editor at the current cursor position:

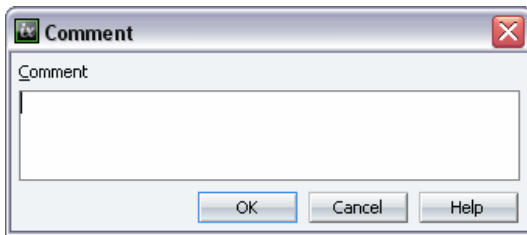
```
g_record["GUID of data field"]
```

You can reference a data field in the script quite easily in this way. The script will be saved if you click on the  floppy symbol in the editor, and it will be run in the process when the condition occurs, for which you have created the action.

You can find additional information on Groovy on the United Planet service portal [Intrex Live!](#), in the area *Intrex Knowledge / Technical Documentation*.

**14. "Stop Process" Action**

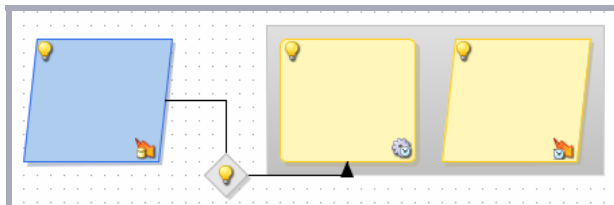
With this action, a process can be stopped at the end of a data groups event or timer event. The action to "Stop Process" can be entered under a condition. The entire process will be stopped if this condition is met. When this occurs, subsequent events will also no longer be executed. Select *Add "Stop Process" Action* from the context menu.



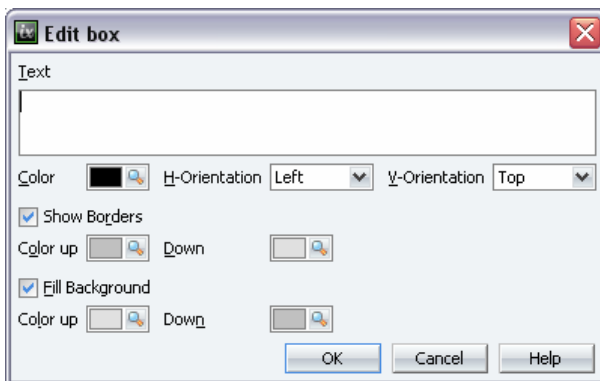
Enter a descriptive comment here.

**15. Diagram View**

The following applies for the diagram view:  
 An action will always be connected to an event using a condition. An action will be connected to another action with the help of a sequence. For clarification of the way individual elements relate to another, the *Box* (background for a grouping) is available for your use.



Double-clicking on the box opens its properties, in which the style of the box can be changed.



Here you can enter *Text* that describes the way the elements in the box correspond to each other. Clicking the *Color* selection list will open a palette, which allows you to select a font color. The *Horizontal* and *Vertical Alignments* of the description will be defined in the selection lists of the same name. The *Show Borders* setting displays a border, the color of which you can define via a small palette. *Fill Background* has the effect of displaying the box opaquely. The fill color can be selected with the palettes *Above* and *Below*.

**16. Details**

If an element is highlighted on the workspace of the Process Manager, additional information can be accessed by pressing the F4 key or by selecting *Details* from the context menu.

