

TRILOGY®



Trilogy MultiChannel Commerce Workflow Manager

User's Guide

Trilogy MultiChannel Commerce Workflow Manager User's Guide

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About This Guide

This guide provides detailed information for the *Trilogy MultiChannel Commerce Workflow Manager (Trilogy MCC Workflow Manager)*TM application. The Trilogy MCC Workflow Manager application enables business analysts to create, validate, and manage workflow plans.

Who Should Use This Guide

This guide is for consultants, developers, or system administrators responsible for developing workflow plans using the Trilogy MCC Workflow Manager software.

In This Guide

This guide is organized as follows:

- *Chapter 1: Overview* — Introduces the Trilogy approach to workflow, explains the purpose and capabilities of the Trilogy MCC Workflow Manager application, and highlights several key Trilogy MCC Workflow concepts.
- *Chapter 2: Getting Started* — Explains how to start the Trilogy MCC Workflow Manager application, and describes the main components of the Trilogy MCC Workflow Manager user interface.
- *Chapter 3: Defining Nodes* — Provides detailed instruction in creating and defining nodes in the Trilogy MCC Workflow Manager application.
- *Chapter 4: Defining Transitions* — Provides detailed instruction in creating and defining transitions between nodes in the Trilogy MCC Workflow Manager application.
- *Chapter 5: Defining Roles and Users* — Provides detailed instruction in creating roles and users, and assigning them in the Trilogy MCC Workflow Manager application.
- *Chapter 6: Validating and Saving Plans* — Explains the various mechanisms for validating and saving workflow plans in the Trilogy MCC Workflow Manager application.

Typographical Conventions

Bold text indicates the following:

- Named interface elements
- Menu commands and options

`Courier` text indicates the following:

- Filenames, pathnames, and file extensions
- Code examples and literal values

Italic text indicates the following:

- Book titles and glossary terms

[Blue, underlined](#) text indicates the following:

- References to other sections of this guide. In the PDF version of the documentation, the blue, underlined area is also a hyperlink to the section.

Related Documentation

- *The Trilogy MultiChannel Commerce Workflow Developer's Guide*
Provides detailed instruction in customizing and integrating the Trilogy MultiChannel Commerce Workflow software.

Chapter 1: Overview

The Trilogy MCC Workflow software facilitates the tasks of defining, sequencing, performing, and analyzing business activities. This chapter details the basic concepts central to the Trilogy MCC Workflow software and includes the following sections:

- Automating Business Processes
- The Trilogy MCC Workflow Software
- Workflow Plans
- The Trilogy MCC Workflow Engine
- The Trilogy MCC Workflow Manager Application
- The Trilogy MCC Workflow Process

Automating Business Processes

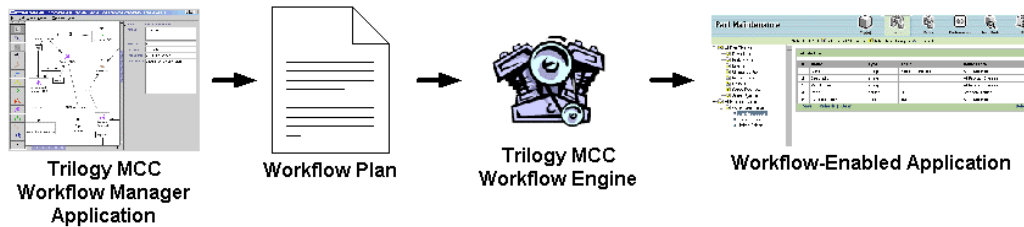
Workflow is the automation of business processes, such as contract or ordering systems. The key to properly implemented workflow systems is to deliver the right information to the right person at the right time. Workflow accomplishes this by taking advantage of repeatable paths for information flow throughout the organization.

The automation of business processes is complex, requiring the advanced knowledge of top business analysts. It is important that business analysts can configure process rules, rather than IT professionals. This ability allows business analysts to make crucial decisions including routing, dynamic pricing, creating purchase requests, and so on.

The Trilogy MCC Workflow Software

Using the Trilogy MCC Workflow software, you can automate complex business processes such as processing a contract. The Trilogy MCC Workflow software includes the following components:

- Workflow Plans
- Trilogy MCC Workflow Engine
- The Trilogy MCC Workflow Manager Application



Workflow Plans

A *workflow plan*, also called a *plan definition*, acts as a flowchart for the Trilogy MCC Workflow software to determine which path to follow, which tasks to schedule, and which parties to assign to tasks. This plan represents a business process such as requesting and scheduling a vacation or submitting paperwork for work orders.

System integrators embed workflow plans within the Trilogy MCC Workflow software to watch for events, to start and end tasks, and to determine activity paths to accomplish complicated processes. After creating and embedding the plan into a Trilogy Workflow-enabled application, users can interact with the plan transparently, easily automating business practices.

Plan developers create plans by combining graphical elements that represent process components. Those components include:

- Nodes
- Transitions
- Roles and Users

Nodes

Workflow nodes are plan elements that describe some business activity or flow control and are linked by causal or sequential relationships. For example, one node might describe an action that a user or program should perform, while another creates a branch in the workflow plan that occurs after the completion of the action. For more information about nodes, see [Chapter 3: Defining Nodes](#).

Transitions

Transitions specify the flow of control between nodes. For example, one transition may specify that a manager's approval occurs directly after a contract has been submitted. If the control flow from a node requires it, a transition may specify extra information, such as yes or no, or a condition. For example, an approval node would have two transitions out, one to the node that should execute if the contract is approved, and the other to the node that should execute if the contract is not approved. For more information about transitions, see [Chapter 4: Defining Transitions](#).

Roles and Users

Some nodes, such as those associated with an action or approval, are assigned a role or user. A *user* is an individual that uses the Trilogy Workflow-enabled software. A *role* is a group of users that have the same permissions or assignments. For example, the creation of a contract may be assigned to a particular user, while the approval of the contract may be assigned to anyone in the manager role. For more information about roles and users, see [Chapter 5: Roles and Users](#).

The Trilogy MCC Workflow Engine

The Trilogy MCC Workflow engine provides a runtime environment for executing a workflow plan. The engine is integrated with other applications to listen for business events and respond by taking the appropriate action. For example, a plan may specify that the submission of a contract, an event, is followed by the approval of that contract by a specific manager. A third-party contract application integrated with the Trilogy MCC Workflow engine could respond to a user submitting a contract in the third-party application by sending an email to the manager, informing her that the contract needs to be approved.

The Trilogy MCC Workflow Manager Application

The Trilogy MCC Workflow Manager application is a Java application that simplifies the process of implementing or maintaining workflow plans. It allows plan developers to use graphical elements to define nodes, link nodes with transitions, assign roles and users, and validate and save plans. The Trilogy MCC Workflow engine can then access those plans to enforce business process rules.

The Trilogy MCC Workflow Process

The following sequence describes the process of enforcing business rules with the Trilogy MCC Workflow software:

1. Use the Trilogy MCC Workflow Manager application to create or edit a workflow plan. Each self-contained business process is represented by a separate workflow plan. Creating a workflow plan includes the following steps:
 - Define nodes for each step in the business process
 - Define transitions between nodes
 - Create and assign roles and users to nodes

2. Use the Trilogy MCC Workflow Manager application to verify that the workflow plan has no errors and that it correctly implements the business process
3. Integrate the Trilogy MCC Workflow engine into each application that is part of the business process
4. Run the Trilogy MCC Workflow engine with a workflow plan to enforce business rules

This document describes how to complete steps one and two above. For more information on completing steps three and four, refer to the *Trilogy MCC Workflow Developer's Guide*.

Chapter 2: Getting Started

This chapter explains how to design a workflow plan and describes the components of the Trilogy MCC Workflow Manager user interface. The chapter includes the following topics:

- Starting the Trilogy MCC Workflow Manager Application
- Components of the Trilogy MCC Workflow Manager User Interface

Starting the Trilogy MCC Workflow Manager Application

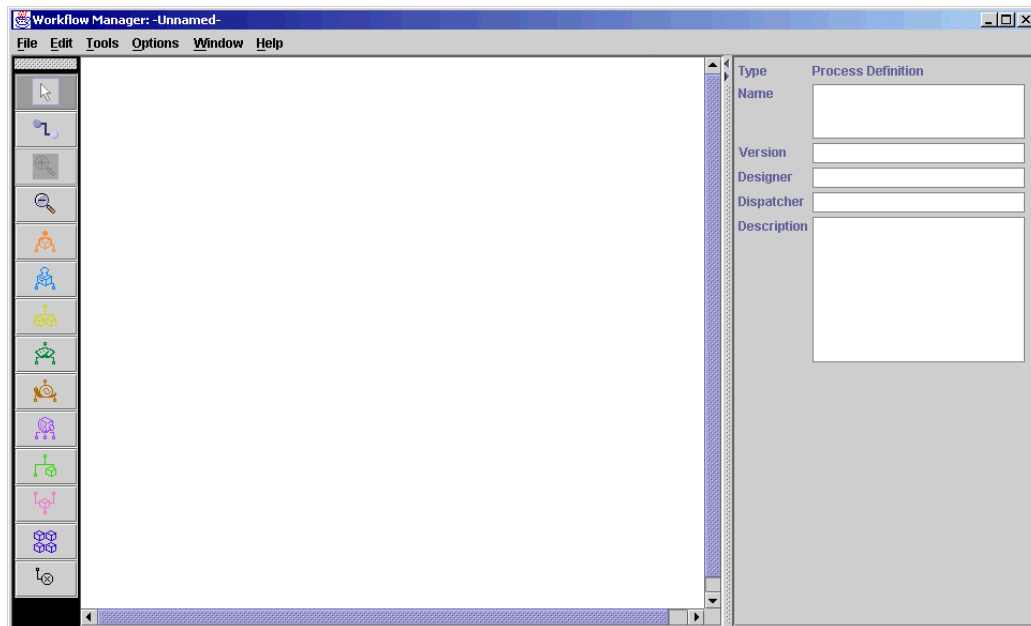
The Trilogy MCC Workflow Manager application is a Java-based application, accessible on any operating system where Java is available. This section describes how to start the Trilogy MCC Workflow Manager application.

Start the Trilogy MCC Workflow Manager Application

1. Open a command prompt and type

```
java com.trilogy.workflow.maint.ProcessDesigner
```

2. The Trilogy MCC Workflow Manager application opens.

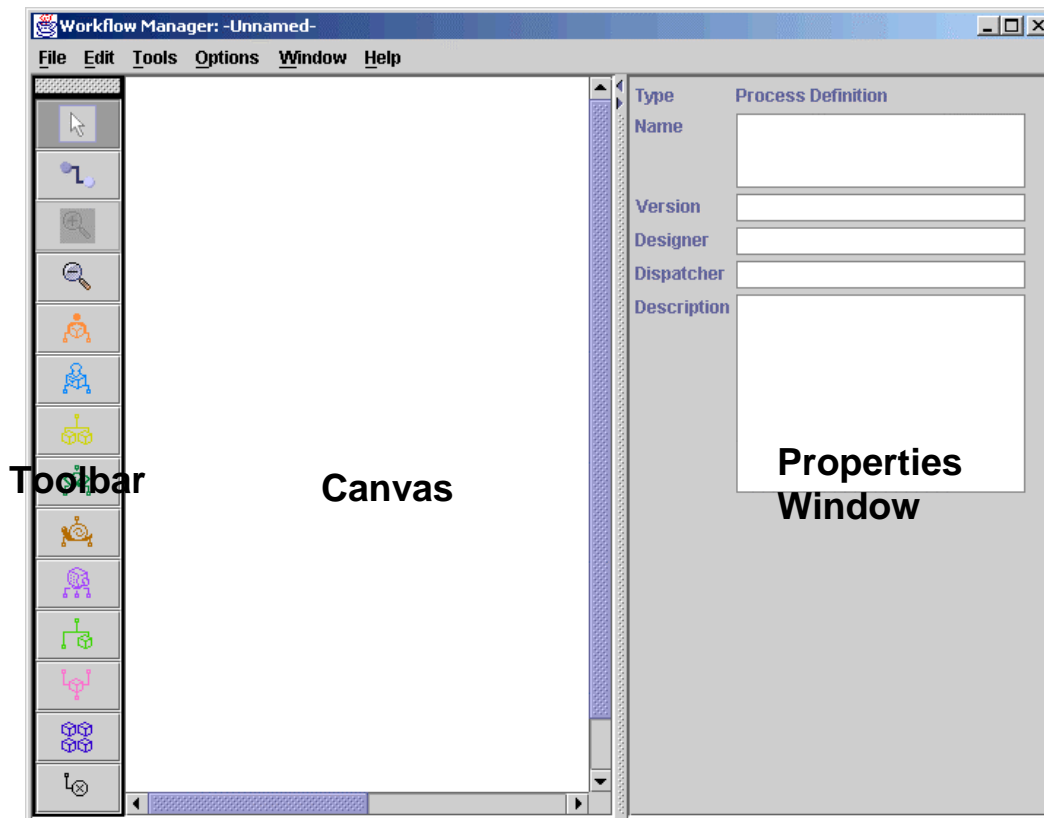


Note: Contact your system administrator if the application does not open.

Trilogy MCC Workflow Manager User Interface Components

This section describes the following user interface elements:

- The Canvas
- The Toolbar
- The Properties Window
- Menus



The Canvas

The canvas is the workplace of the Trilogy MCC Workflow Manager application. Use it like a desktop to create or modify workflow plans

The Toolbar

- The Toolbar contains all tools and elements that you use to create or modify workflow plans.

Select Tool



Use this tool to select elements or groups of elements in the workflow plan. The selection tool is on by default when the Trilogy MCC Workflow Manager opens.

Zoom In Tool



Use this tool to zoom in to the canvas.

Zoom Out Tool



Use this tool to zoom out of the canvas.

Transition Tool



Use this tool to add transitions to your workflow plan. See [Chapter 4: Defining Transitions](#) for further instructions about adding transitions to a workflow plan.

Action Node Tool



Use this tool to add an Action node to your workflow plan. See the section [The Action Node](#) in Chapter 3: Defining Nodes for further instructions about using Action nodes in a workflow plan.

The Approval Node Tool



Use this tool to add an Approval node to your workflow plan. See the section [The Approval Node](#) in Chapter 3: Defining Nodes for further instructions about using Approval nodes in a workflow plan.

The Branch Node Tool



Use this tool to add a Branch node to your workflow plan. See the section [The Branch Node](#) in Chapter 3: Defining Nodes for further instructions about using Branch nodes in a workflow plan.

The Case Node Tool



Use this tool to add a Case node to your workflow plan. See the section [The Case Node](#) in Chapter 3: Defining Nodes for further instructions about using Case nodes in a workflow plan.

The Delay Node Tool



Use this tool to add a Delay node to your workflow plan. See the section [The Delay Node](#) in Chapter 3: Defining Nodes for further instructions about using Delay nodes in a workflow plan.

The Dispatch Node Tool



Use this tool to add a Dispatch node to your workflow plan. See the section [The Dispatch Node](#) in Chapter 3: Defining Nodes for further instructions about using Dispatch nodes in a workflow plan.

The Fork Node Tool



Use this tool to add a Fork node to your workflow plan. See the section [The Fork Node](#) in Chapter 3: Defining Nodes for further instructions about using Fork nodes in a workflow plan.

The Join Node Tool



Use this tool to add a Join node to your workflow plan. See the section [The Join Node](#) in Chapter 3: Defining Nodes for further instructions about using Join nodes in a workflow plan.

The Sub-Process Node Tool



Use this tool to add a Sub-Process node to your workflow plan. See the section [The Sub-Process Node](#) in Chapter 3: Defining Nodes for further instructions about using Sub-Process nodes in a workflow plan.

The Noop Node Tool



Use this tool to add a Noop node to your workflow plan. See the section [The Noop Node](#) in Chapter 3: Defining Nodes for further instructions about using Noop nodes in a workflow plan.

The Properties Window

On selection of a workflow plan element, the **Properties Window** displays the attributes of the selected element. Use the **Properties Window** to edit the related attributes. See [Chapter 3: Defining Nodes](#) and [Chapter 4: Defining Transitions](#) for instructions on defining the properties of workflow plan elements.

This section describes the following properties of workflow plan elements:

- Canvas Properties
- Node Properties

Note: If the *Properties window* is not visible, select *Display Properties Window* from the *Window* menu.

The Type Property Display

All plan elements share the **Type** property. This property displays the type of plan element currently selected. The **Type** property is always located at the top of the **Properties** window.

Canvas Properties

The properties of the Canvas display when the Canvas is selected. The following table outlines the name and purpose of each of the Canvas properties.

Canvas Property Name	Canvas Property Description
Name	The name of the current workflow plan.
Version	The version of the current workflow plan.
Designer	The person that created the current workflow plan.
Description	A brief description of the current workflow plan.

Node Properties

The properties of a node display in the **Properties** window when the node is selected. The following sections outline the properties of each type of node.

Common Node Properties

All nodes share some basic properties. The following table outlines the name and purpose of each of the properties common to all nodes.

Node Property Name	Node Property Description
Name	The name of the currently selected node.
Description	A brief description of the currently selected node.
Root	Checked if the currently selected node is the root node of the workflow plan. For more information on root nodes, see Chapter 3: Defining Nodes .
X	The horizontal position of the currently selected node, in pixels, from the left side of the Canvas.
Y	The vertical position of the currently selected node, in pixels, from the bottom of the Canvas.

For more information on setting node properties, see [Chapter 3: Defining Nodes](#).

Action Node Properties

The properties of the Action node describe the details of the action represented. The following table outlines the name and purpose of each of the properties of the Action node.

Node Property Name	Node Property Description
Role	The name of a role that performs the action.
User	The name of a user that performs the action.
Duration	The amount of time that the action takes.
Priority	The relative priority of this action over other actions.

For more information on setting Action node properties, see [The Action Node](#) in Chapter 3: Defining Nodes.

Approval Node Properties

The properties of the Approval node describe the details of the approval represented. The following table outlines the name and purpose of each of the properties of the Approval node.

Node Property Name	Node Property Description
Condition	The condition on which the approval is made.
Role	The name of a role that performs the approval.
User	The name of a user that performs the approval.
Duration	The amount of time that the approval takes.
Priority	The relative priority of this approval over other approvals.

For more information on setting Approval node properties, see [The Approval Node](#) in Chapter 3: Defining Nodes.

Branch Node Properties

The properties of the Branch node describe the details of the branch represented. The following table outlines the name and purpose of each of the properties of the Branch node.

Node Property Name	Node Property Description
Condition	The condition on which the branch transition executes.

For more information on setting Branch node properties, see [The Branch Node](#) in Chapter 3: Defining Nodes.

Case Node Properties

The only properties on the Case node are the [Common Node Properties](#).

Delay Node Properties

The properties of the Delay node describe the details of the delay represented. The following table outlines the name and purpose of each of the properties of the Delay node.

Node Property Name	Node Property Description
Time	The amount of time taken by the delay.
Condition	The condition on which the delay occurs.

For more information on setting Delay node properties, see [The Delay Node](#) in Chapter 3: Defining Nodes.

Dispatch Node Properties

The properties of the Dispatch node describe the details of the dispatch represented. The following table outlines the name and purpose of each of the properties of the Dispatch node.

Node Property Name	Node Property Description
Role	The name of a role that dispatches activities.
User	The name of a user that dispatches activities.
Duration	The amount of time that the dispatch takes.
Priority	The relative priority of this dispatch over other dispatches.

For more information on setting Dispatch node properties, see [The Dispatch Node](#) in Chapter 3: Defining Nodes.

Fork Node Properties

The only properties on the Fork node are the [Common Node Properties](#).

Join Node Properties

The only properties on the Join node are the [Common Node Properties](#).

Sub-Process Node Properties

The properties of the Sub-Process node describe the details of the sub-process represented. The following table outlines the name and purpose of each of the properties of the Sub-Process node.

Node Property Name	Node Property Description
Filename	The full path and filename of an XML workflow plan file used as a sub-process.

For more information on setting Sub-Process node properties, see [The Sub-Process Node](#) in Chapter 3: Nodes.

Noop Node Properties

The only properties on the Noop node are the [Common Node Properties](#).

Menus

You can use the menus to perform most functions in the application. You can access menus using the menu bar at the top of the application. The menus often display keyboard shortcuts that you can alternatively use to execute commands.

This section describes the following menus:

- File Menu
- Edit menu
- Tools Menu
- Options Menu
- Window Menu
- Help Window

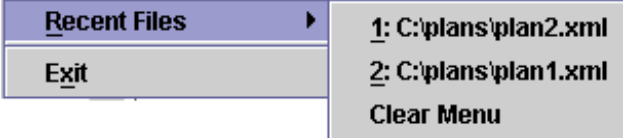
File Menu

Use the **File** menu to perform operations on the workflow plan as a whole.



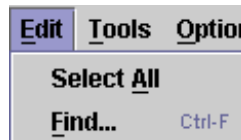
The following table describes each function of the **File** menu.

Menu Item	Description
New	Create a new workflow plan.
Open...	Open an existing workflow plan.
Close	Close the current workflow plan.
Save	Save the current workflow plan to an XML file with the same name in the same location.
Save As...	Save the current workflow plan to an XML file with a new name or in a new location.
Save as Image...	Save the current workflow plan as a JPEG image file.
Print...	Print the current workflow plan.

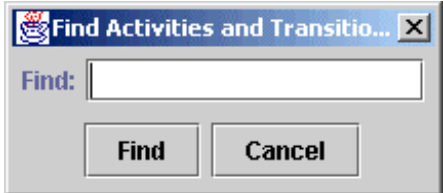
Menu Item	Description
Recent Files	Provides a sub-menu of workflow plans that have been accessed recently. Select Clear Menu to clear the list. 
Exit	Exit the application.

Edit Menu

Use the **Edit** menu to select all or some of the elements of a workflow plan.



The following table describes each function of the **Edit** menu.

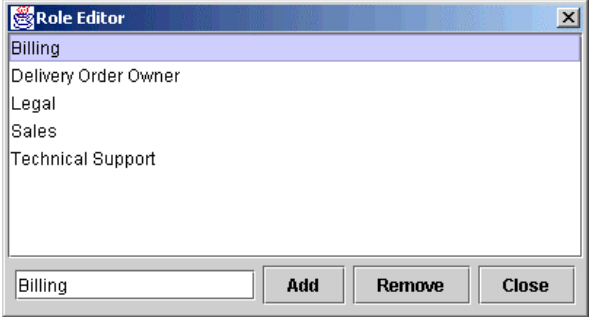
Menu Item	Description
Select All	Select all of the elements of the current workflow plan.
Find...	Find particular elements in the current workflow plan. The Name property of each node and the Even property of each transition in the plan are searched for the text specified in the Find text box. 

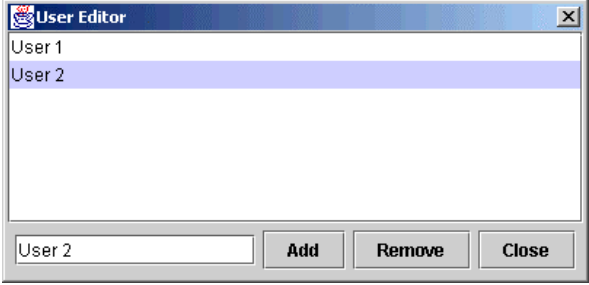
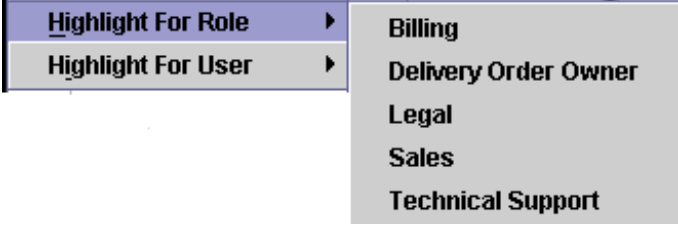

Tools Menu

Use the **Tools** menu to perform operations on the plan and its components.



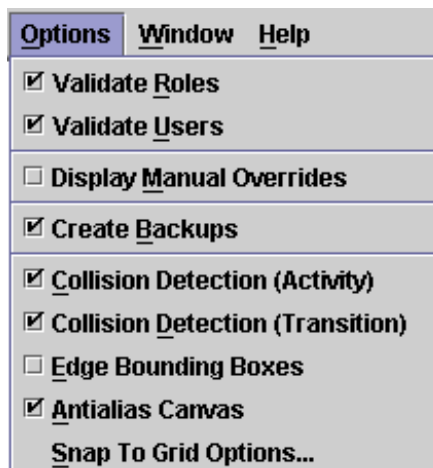
The following table describes each function of the **Tools** menu.

Menu Item	Description
Validate...	Checks the current workflow plan for any errors and reports any errors found in a message. If no errors are found, a message displays stating that validation was successful.
Snap To Grid	Moves each of the elements in the workflow plan so that the nodes display spaced out as on a grid. See the Options Menu for information on Snap To Grid options.
Random Layout	Moves each of the elements in the workflow plan so that each of the nodes display in a randomly chosen location. Transitions between nodes are preserved.
Edit Roles...	Launch the Role Editor, which allows you to add and remove roles. For more information on editing roles, see Chapter 5: Roles and Users . 
Edit Users...	Launch the User Editor, which allows you to add and remove users. For more information on editing users, see Chapter 5: Roles and Users .

Menu Item	Description
	
<p>Highlight For Role</p>	<p>Highlight all workflow plan elements assigned the specified role. For more information on editing roles, see Chapter 5: Roles and Users.</p> 
<p>Highlight For User</p>	<p>Highlight all workflow plan elements assigned the specified user. For more information on editing users, see Chapter 5: Roles and Users.</p> 

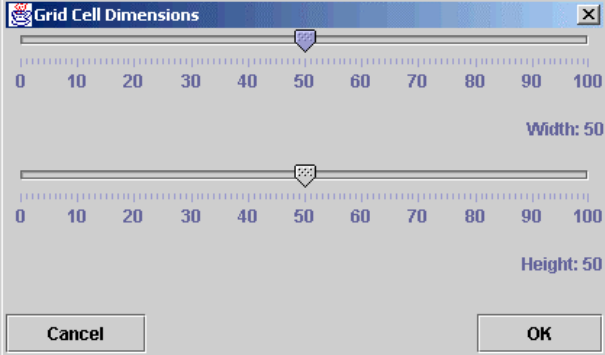
Options Menu

Use the **Options** menu to set Trilogy MCC Workflow Manager environment options.



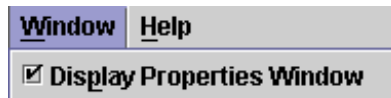
The following table describes each function of the **Options** menu.

Menu Item	Description
Validate Roles	<p>Ensures that any roles specified as properties on workflow plan elements have already been created using the Role Editor.</p> <p>For more information on editing roles, see Chapter 5: Roles and Users.</p> <hr/> <p>Note: <i>This functionality is for advanced users only.</i></p> <hr/>
Validate Users	<p>Ensures that any users specified as properties on workflow plan elements have already been created using the User Editor.</p> <p>For more information on editing users, see Chapter 5: Roles and Users.</p> <hr/> <p>Note: <i>This functionality is for advanced users only.</i></p> <hr/>
Display Manual Overrides	<p>Displays additional text entry fields in the Property window of the selected workflow plan element, which allows customized XML code to be entered. This code overrides XML that is generated by default for the related node.</p> <hr/> <p>Note: <i>This functionality is for advanced users only.</i></p> <hr/>
Create Backups	<p>Saves a backup of the previous version of the workflow plan with a *.bak extension.</p> <p>For example, if you modify and save plan1.xml with the Create Backups option turned on, the application creates two workflow plans: plan1.xml with the latest changes, and plan1.xml.bak without the latest changes.</p>
Collision Detection (Activity)	<p>Prevent node icons from overlapping on the canvas.</p>
Collision Detection (Transition)	<p>Prevent transition icons from overlapping on the canvas.</p>
Edge Bounding Boxes	<p>When a transition is selected, surround the transition lines with a box. When this option is turned off, the transition is simply highlighted upon</p>

Menu Item	Description
	selection.
Antialias Canvas	Smooths jagged edges that may occur on workflow plan elements, by subtly blending the edge into the Canvas.
Snap to Grid Options...	<p>Launches the Grid Cell Dimensions window, which allows you to set the height and width of Canvas grid cells.</p> 

Window Menu

Use the **Window** menu to hide or show the **Properties** window.



The following table describes each function of the **Window** menu.

Menu Item	Description
Display Properties Window	Hide or show the Properties window.

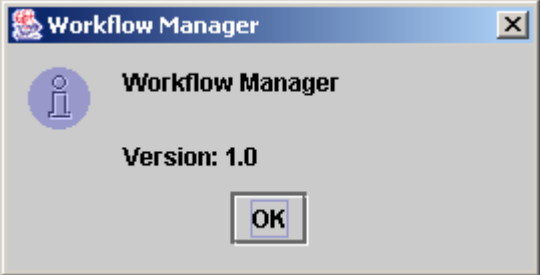
Help Menu

Use the **Help** menu to display a window that provides version information.



The following table describes each function of the **Help** menu.

Menu Item	Description
About...	Display the Workflow Manager window.

Menu Item	Description
	 A screenshot of a Windows-style dialog box titled "Workflow Manager". The dialog box has a blue title bar with a close button (X) on the right. Below the title bar, there is a blue circular icon with a white lowercase letter 'i' inside. To the right of the icon, the text "Workflow Manager" is displayed. Below that, the text "Version: 1.0" is shown. At the bottom center of the dialog box, there is a rectangular button with the text "OK" inside.

Chapter 3: Defining Nodes

This chapter explains how to create and define nodes in a workflow plan using the Trilogy MCC Workflow Manager application.

Workflow Node Concepts

Workflow nodes are the basic elements that make up a workflow plan. This section discusses:

- Types of Nodes
- Root Nodes
- Creating Nodes

Types of Nodes

The Trilogy MCC Workflow Manager application supports two types of nodes: Activity nodes and Transition nodes.

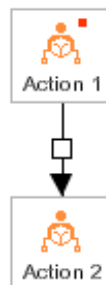
Activity nodes represent activities that can be performed by a user, role, or the application. Examples of processes represented by Activity nodes are the creation of a contract and the approval of an order.

Transition nodes represent activities that control the flow of the business process. Examples of processes represented by Transition nodes include deciding which activity to perform based on a value, and a delay in process flow for a specific period of time.

Root Nodes

A *root node* is the place in the workflow plan where execution begins. Every plan must have one and only one root node. Any node may act as the root node. For more information on setting root nodes, see [Common Node Properties](#) in Chapter 2: Getting Started.

The following diagram shows the typical use of a root node.



In the diagram above, the node `Action 1` is the root node. The Trilogy MCC Workflow engine executes `Action 1` before executing any other nodes, including `Action 2`.

Creating Nodes

To create a node, complete the following steps:

Create a Node

1. Click the appropriate Node tool on the toolbar.
2. Click the place on the Canvas where the node should display.
3. Set the properties on the node.

For more information on setting properties on nodes, see each node below.

4. Define transitions in and out of the node.

For more information on defining transitions, see [Chapter 4: Defining Transitions](#).

Activity Nodes

There are three types of Activity nodes:

- The Action Node
- The Approval Node
- The Dispatch Node

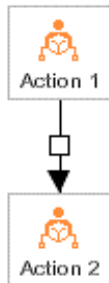
This section describes how and when to add each type of node, and how to set properties on each of those nodes.

The Action Node



An action node describes an activity that a user or application must perform. The Action Node can be used for both manual and automatic actions. However, designers should remember that a key objective is to automate as many steps in the process as possible.

The following diagram shows the typical use of an Action node.



In the diagram above, the Action node `Action 2` follows the Action node `Action 1`. The Trilogy MCC Workflow engine executes `Action 1` before executing `Action 2`.

To set properties of an Action node, complete the following steps:

Define an Action Node

1. Specify the name of the node.

Name	Submit Order
-------------	--------------

2. Provide a description of the node.

Description	Submit the order for approval
--------------------	-------------------------------

3. Specify whether the node is the root of the workflow plan.

Root	<input checked="" type="checkbox"/>
-------------	-------------------------------------

4. Specify which role or user is responsible for the action.

For more information on specifying roles and users, see [Chapter 5: Roles and Users](#).

5. Define how long the action takes.

Duration	1 day
-----------------	-------

6. Specify the relative priority of the action.

Priority	1
-----------------	---

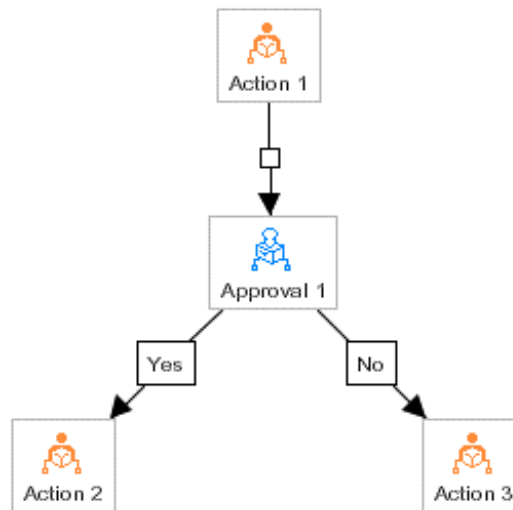
The Approval Node



An *Approval node* details an approval decision that a user or a program must make. Approval nodes require a decision by a user or external program that must evaluate to either “yes” or “no”. After the program or user has completed the activity, the workflow engine evaluates an **SCFormula** expression to determine which path to take. An **SCFormula** is a Trilogy format for a generic expression, such as `o.managerApproves()` or `x +1 == y`.

For more information on creating **SCFormula** expressions, refer to the *Trilogy Multichannel Commerce Workflow Developer’s Guide*.

The following diagram shows the typical use of an Approval node.



In the diagram above, the Approval node `Approval 1` follows the Action node `Action 1`. There are two Actions that follow the approval: `Action 2` is executed if the condition of `Approval 1` evaluates to **true**, and `Action 3` is executed if the condition of `Approval 1` evaluates to **false**.

To set properties of an Approval node, complete the following steps:

Define an Approval Node

1. Specify the name of the node.

Name	Approve Order
------	---------------

2. Provide a description of the node.

Description	Manager approval of the order
--------------------	-------------------------------

- Specify whether the node is the root of the workflow plan.

Root	<input checked="" type="checkbox"/>
-------------	-------------------------------------

- Provide an **SCFormula** expression that evaluates to **true** if the Yes path should be taken and **false** if the No path should be taken.

Condition	<input type="text" value="o.managerApproves()"/>
------------------	--

- Specify which role or user is responsible for the action.

For more information on specifying roles and users, see [Chapter 5: Roles and Users](#).

- Define how long the action takes.

Duration	<input type="text" value="1 day"/>
-----------------	------------------------------------

- Specify the relative priority of the action.

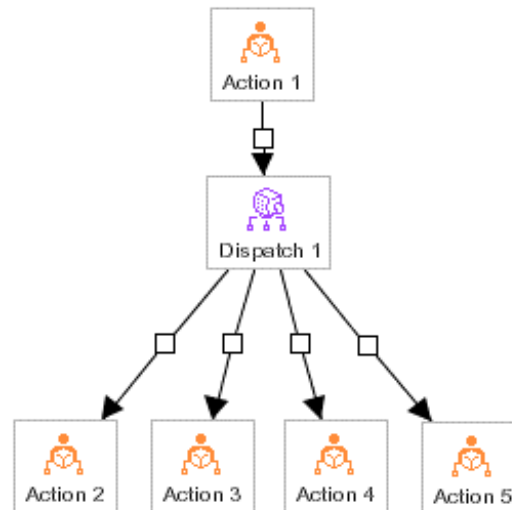
Priority	<input type="text" value="1"/>
-----------------	--------------------------------

The Dispatch Node



A *Dispatch node* is similar to an approval node, in that it describes a decision that a user or application must make. Unlike the approval node, a Dispatch node is followed by an unlimited number of paths, and an event received by the Trilogy MCC Workflow engine determines which path to follow. For more information on defining transitions on Dispatch nodes, see [Dispatch Transitions](#) in Chapter 4: Defining Transitions.

The following diagram shows the typical use of a Dispatch node.



In the diagram above, the Dispatch node `Dispatch 1` follows the Action node `Action 1`. There are four actions that follow the dispatch. `Action 2`, `Action 3`, `Action 4` and `Action 5` may all execute after `Dispatch 1`, but each executes only if the event on the path leading to it occurs.

To set properties of a Dispatch node, complete the following steps:

Define a Dispatch Node

1. Specify the name of the node.

Name	Dispatch Order
-------------	----------------

2. Provide a description of the node.

Description	Dispatch order to Legal, Billing or Technical Support
--------------------	---

3. Specify whether the node is the root of the workflow plan.

Root	<input checked="" type="checkbox"/>
-------------	-------------------------------------

4. Specify which role or user is responsible for the action.

For more information on specifying roles and users, see [Chapter 5: Roles and Users](#).

5. Define how long the action takes.

Duration	1 day
-----------------	-------

- Specify the relative priority of the action.

Priority	<input type="text" value="1"/>
----------	--------------------------------

Transition Nodes

There are seven types of Transition nodes:

- The Branch Node
- The Case Node
- The Delay Node
- The Fork Node
- The Join Node
- The Sub-Process Node
- The Noop Node

This section describes how and when to add each type of node, and how to set properties on each of those nodes.

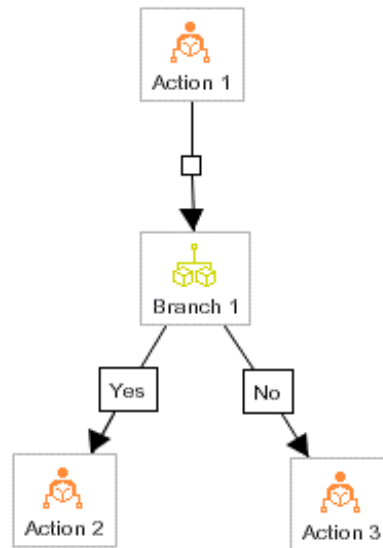
The Branch Node

A *Branch node* has two branches and decides which branch to take without waiting for an event to occur. You should use a Branch node when determining a path without a decision from a user or the application. For example, an order processing system may process orders differently depending on the total price of each order. If the total price of the order is under \$500, the order is submitted directly to Billing. If the total price of the order is over \$500, the order must be approved by a manager before it is submitted to Billing. Using the Branch node, the system could evaluate the total price of the order and determine the path without the input of a user or an external application.

When the Trilogy MCC Workflow engine encounters a Branch node, the engine evaluates an **SCFormula** expression to determine which path to take. For more information on creating **SCFormula** expressions, refer to the *Trilogy Multichannel Commerce Workflow Developer's Guide*.

The Branch node can be used to simulate if-then logic, because it does not run two paths in parallel. If you need to run two or more paths in parallel, refer to [The Case Node](#).

The following diagram shows the typical use of a Branch node.



In the diagram above, the Branch node Branch 1 follows the Action node Action 1. There are two Actions that follow the branch: Action 2 is executed if the condition of Branch 1 evaluates to **true**, and Action 3 is executed if the condition of Branch 1 evaluates to **false**.

To set properties of a Branch node, complete the following steps:

Define a Branch Node

1. Specify the name of the node.

Name	Branch Expensive Order
-------------	------------------------

2. Provide a description of the node.

Description	If the order is over \$500, get approval before submitting to Billing. Otherwise, submit to Billing now.
--------------------	--

3. Specify whether the node is the root of the workflow plan.

Root	<input checked="" type="checkbox"/>
-------------	-------------------------------------

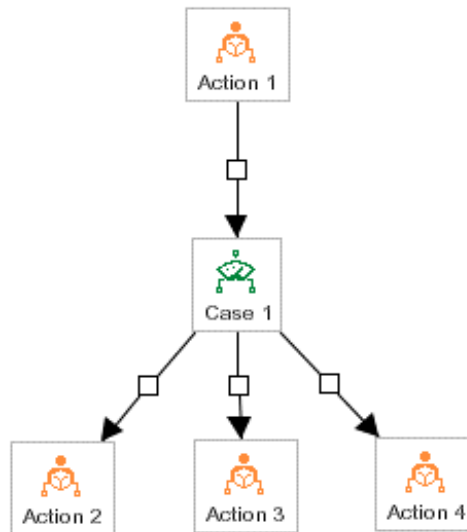
4. Provide an **SCFormula** expression that evaluates to **true** if the Yes path should be taken and **false** if the No path should be taken.

Condition	<code>o.totalPrice() > 500</code>
------------------	--------------------------------------

The Case Node

A *Case node* splits a process into any number of parallel paths. Unlike the Branch node, the expression evaluated to determine the path taken by the Case node is not a property of the node itself, but a property of the outgoing transition. For more information on defining transitions on Case nodes, see [Case Transitions](#) in Chapter 4: Defining Transitions.

The following diagram shows the typical use of a Case node.



In the diagram above, the Case node *Case 1* follows the Action node *Action 1*. There are three actions that follow the case. *Action 2*, *Action 3*, and *Action 4* may all execute after *Case 1*, but each executes only if the condition on the path leading to it evaluates to **true**.

To set properties of a Case node, complete the following steps:

Define a Case Node

1. Specify the name of the node.

Name	Handle Billing Cases
-------------	----------------------

2. Provide a description of the node.

Description	Process order billing based on the cases
--------------------	--

- Specify whether the node is the root of the workflow plan.

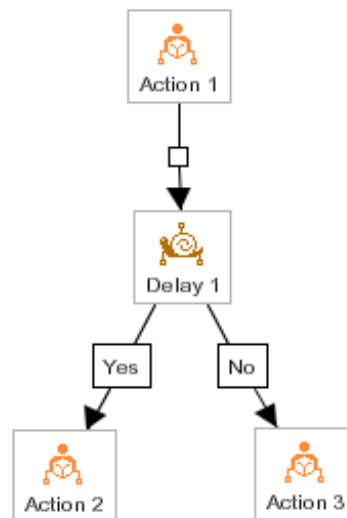


The Delay Node

The *Delay node* is a Branch node that executes after a specified delay. Like the Branch node, the Delay node checks to see if a specific condition has occurred. However, the delay node differs by first waiting a specified amount of time before checking. If the condition has occurred, then the Trilogy MCC Workflow engine executes the **true** branch that follows. Otherwise it executes the **false** branch. Typically, the **false** branch is not specified, indicating the end of execution if the condition evaluates to **false**.

You can use a forked Delay node to delay the approval of an order for three days. After the delay, the delay node executes. If the order has not been approved, then the Trilogy MCC Workflow engine might send a reminder email and perhaps go into a second stage escalation path. The **false** path would be blank, meaning that execution ends if the order has been approved.

The following diagram shows the typical use of a Delay node.



In the diagram above, the Delay node *Delay 1* follows the Action node *Action 1*. After waiting the length of the delay associated with *Delay 1*, the condition of *Delay 1* is evaluated. There are two Actions that follow the delay: *Action 2* executes if the condition of *Delay 1* evaluates to **true**, and *Action 3* executes if the condition of *Delay 1* evaluates to **false**.

To set properties of a Delay node, complete the following steps:

Define a Delay Node

- Specify the name of the node.

Name	Wait for Approval
-------------	-------------------

2. Provide a description of the node.

Description	Wait 3 days for the order to be approved
--------------------	--

3. Specify whether the node is the root of the workflow plan.

Root	<input checked="" type="checkbox"/>
-------------	-------------------------------------

4. Define the length of delay before evaluating the condition.

Time	3days
-------------	-------

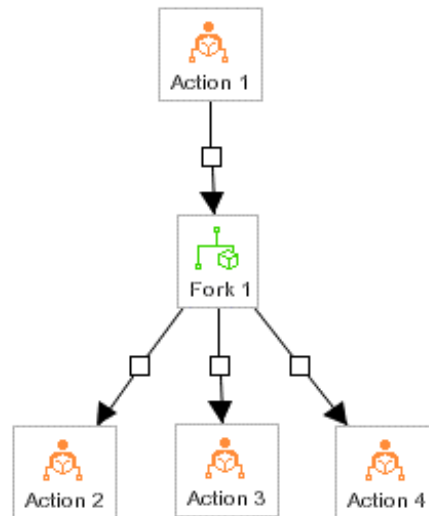
5. Provide an **SCFormula** expression that evaluates to **true** if the Yes path should be taken and **false** if the No path should be taken.

Condition	o.orderApproved()
------------------	-------------------

The Fork Node

The *Fork node* splits parallel execution paths unconditionally. A Fork node has multiple branches like a Case node, but there are no expressions on the transitions. The workflow engine executes all transitions of the node. For more information on defining transitions on Fork nodes, see [Fork Node Transitions](#) in Chapter 4: Defining Transitions.

The following diagram shows the typical use of a Fork node.



In the diagram above, the Fork node `Fork 1` follows the Action node `Action 1`. There are three actions that follow the fork. `Action 2`, `Action 3`, and `Action 4` all execute after `Action 1`.

To set properties of a Fork node, complete the following steps:

Define a Fork Node

1. Specify the name of the node.

Name	Submit to Accounts Payable, Legal and Finance
-------------	---

2. Provide a description of the node.

Description	Submit the order to three departments at the same time
--------------------	--

3. Specify whether the node is the root of the workflow plan.

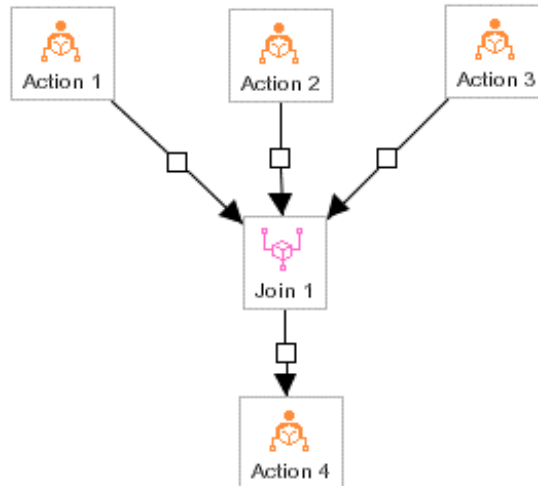
Root	<input checked="" type="checkbox"/>
-------------	-------------------------------------

The Join Node

The *Join node* is the converse of the Fork node. A Join node unites parallel branches back into a single path. The Trilogy MCC Workflow engine waits for all the precedents of the Join node to finish before proceeding over it.

The Join node should be used when an activity has to wait for several parallel activities to finish. It should lead to an action node that is associated with that activity.

The following diagram shows the typical use of a Join node.



In the diagram above, the Join node `Join 1` does not execute until all of the Action nodes `Action 1`, `Action 2`, and `Action 3` have completed. After completion of the join, `Action 4` executes.

To set properties of a Join node, complete the following steps:

Define a Join Node

1. Specify the name of the node.

Name	Join Admin Activities
-------------	-----------------------

2. Provide a description of the node.

Description	Synchronize Accounts Payable, Legal and Finance Actions
--------------------	---

3. Specify whether the node is the root of the workflow plan.

Root	<input checked="" type="checkbox"/>
-------------	-------------------------------------

Note: You should never make a Join node the root of a workflow plan, as it joins previous activities.

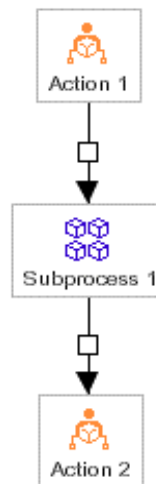
The Sub-Process Node



A *Sub-Process node* represents a workflow plan that is a part of a larger workflow plan. Sub-Process nodes simplify workflow plan management by dividing a large workflow into smaller groups. Dividing the run-time logic of a large workflow into smaller sub-workflows may also improve performance.

The Trilogy MCC Workflow software supports any level of nesting, allowing you to nest workflow plans within workflow plans. Through the nesting of workflow plans, you can revise a process section without affecting the higher-level plan.

The following diagram shows the typical use of a Sub-Process node.



In the diagram above, the Sub-Process node `Subprocess 1` follows the Action node `Action 1`. After completing execution of `Action 1`, the Trilogy MCC Workflow engine executes the workflow plan represented by `Subprocess 1`. When `Subprocess 1` terminates, the Trilogy MCC Workflow engine executes `Action 2`.

To set properties of a Sub-Process node, complete the following steps:

Define a Sub-Process Node

1. Specify the name of the node.

Name	Archive Order
------	---------------

2. Provide a description of the node.

Description	Execute the workflow plan that archives orders
--------------------	--

- Specify whether the node is the root of the workflow plan.

Root	<input checked="" type="checkbox"/>
-------------	-------------------------------------

- Browse for the XML file that details the sub-workflow plan.

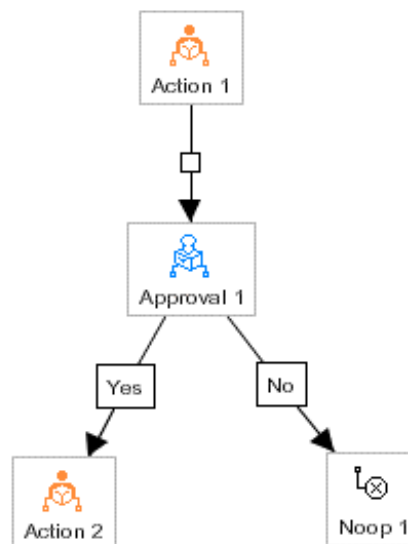
Filename	C:\planstarchive_order.xml
Browse...	

The Noop Node



The *Noop* (no operation) *node* is used when no action should be taken in the business process. Because no paths can exit from a Noop node, it acts as an execution termination point of the workflow plan. Examples of processes represented by Noop nodes are the rejection of an order or system failure.

The following diagram shows the typical use of a Noop node.



In the diagram above, the Noop node `Noop 1` follows the Approval node `Approval 1`. If the approval fails, execution of the workflow plan terminates with execution of the Noop node `Noop1`.

To set properties of a Noop node, complete the following steps:

Define a Noop Node

1. Specify the name of the node.

Name	System Failure
-------------	----------------

2. Provide a description of the node.

Description	The application has entered an unknown state
--------------------	--

3. Specify whether the node is the root of the workflow plan.

Root	<input checked="" type="checkbox"/>
-------------	-------------------------------------

Note: A Noop node should never be the root of a workflow plan. Since no paths can originate from a Noop node, the plan would be meaningless, as it would only contain the root element.

Chapter 4: Defining Transitions

This chapter explains how to create and define transitions in a workflow plan using the Trilogy MCC Workflow Manager application.

Understanding and Defining Transitions

Transitions link nodes in a workflow plan, and specify which nodes execute before others. This section covers the following topics:

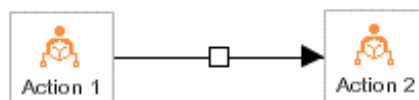
- Adding Transitions
- Understanding Transitions

Anatomy of a Transition

Each transition has the following components:

- **Originating Node:** The node from which the transition leads. Each transition must have exactly one originating node.
- **Terminating Node:** The node to which the transition leads. Each transition must have exactly one terminating node.
- **Transition Handle:** The box in the middle of the transition, by which the developer can change the position of the transition. For some transition types, the Transition Handle contains informational text.
- **Transition Arrow:** The arrow that points from the originating node to the terminating node.

The following diagram shows a typical transition:



In the diagram above, the Action node `Action 1` is the originating node, the Action node `Action 2` is the terminating node and the box in the middle is the transition handle. The transition arrow points to `Action 2`.

Adding Transitions

The Transition Tool is used to create transitions. Create a transition by specifying the starting node, the ending node, and the properties of the transition. Complete the following steps to add a transition to a workflow plan.

Add a Transition to a Workflow Plan

1. Click the **Transition Tool** in the **Toolbar**.
2. Click the node from which the transition starts.
3. Click the node to which the transition leads.
4. Specify the properties of the transition in the **Properties** window.

Understanding Transitions from Nodes

All node types accept any number of transitions and any transition type coming in. The number of transitions and the types of properties on the transition are determined by the type of node linked, and whether the transition is linked to the node or from the node. The table below describes the effect of linking from the various types of nodes.

Node Type	Meaning of Transition
Action Node	Basic transition. The linked node executes immediately. One transition allowed.
Approval Node	Yes/No transition. The linked node executes only if the proper Yes/No value was evaluated on the Condition property of the Approval node. Two transitions allowed.
Branch Node	Yes/No transition. The linked node executes only if the proper Yes/No value was evaluated on the Condition property of the Branch node. Two transitions allowed.
Case Node	Case transition. The linked node executes only if the Condition property of the transition evaluates to true .
Delay Node	Yes/No transition. The linked node executes only if the proper Yes/No value was evaluated on the Condition property of the Delay node. Two transitions allowed.
Dispatch Node	Dispatch transition. The linked node executes only if the Event property of the transition occurs.
Fork Node	Basic transition. The linked node executes immediately. Multiple transition allowed.
Join Node	Basic transition. The linked node executes immediately. One transition allowed.
Sub-Process Node	Basic transition. The linked node executes immediately. One transition allowed.

Node Type	Meaning of Transition
	immediately. One transition allowed.
Noop Node	No transitions allowed.

Understanding Transition Types

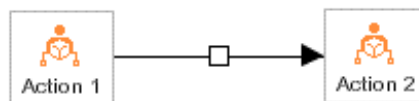
Transitions mean different things going in and going out for each type of node.

Basic Transitions

The *Basic Transition* type is the simplest type of transition. When the Trilogy MCC Workflow engine encounters a basic transition, it executes the terminating node immediately. There are no conditions or events associated with the transition.

The properties of the Basic Transition are the **Type** property, and the **X** and **Y** properties. The **X** and **Y** properties specify the position on the Canvas of the transition handle.

The following diagram shows the typical usage of a Basic transition:



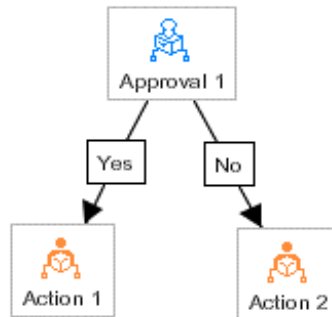
In the diagram above, the completion of the Action node `Action 1` is followed immediately by the execution of the Action node `Action 2`.

Yes/No Transitions

The *Yes/No Transition* type is used when the originating node is an Approval, Branch or Delay node. When the Trilogy MCC Workflow engine encounters a Yes/No transition, it executes the terminating node only if the Yes/No property of the transition has the same value as the result of the Condition property of the previous node.

The properties of the Yes/No Transition are the **Type** property, the **X** and **Y** properties, and the **Yes/No** property. The **X** and **Y** properties specify the position on the Canvas of the transition handle. The **Yes/No** property specifies whether the **Condition** property of the originating node must evaluate to **true** or **false** for the engine to take this path.

The following diagram shows the typical usage of a Yes/No transition:



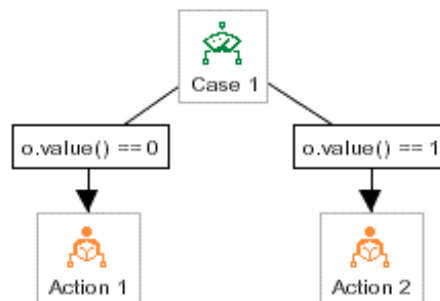
In the diagram above, the Action node `Action 1` executes only if the **Condition** property of the Approval node `Approval 1` evaluates to true. Otherwise the Action node `Action 2` executes.

Case Transitions

The *Case Transition* type is used when the originating node is a Case node. When the Trilogy MCC Workflow engine encounters a Case transition, it evaluates the Condition property of the transition, and executes the terminating node only if the result of the evaluation is **true**.

The properties of the Case Transition are the **Type** property, the **X** and **Y** properties, and the **Condition** property. The **X** and **Y** properties specify the position on the canvas of the transition handle. The **Condition** property specifies the expression that must evaluate to **true** for the engine to take this path.

The following diagram shows the typical usage of a Case transition:



In the diagram above, the Action node `Action 1` executes only if the expression `o.value() == 0` evaluates to true. If the expression `o.value() == 1` evaluates to true, the Action node `Action 2` executes. Otherwise, execution of the workflow plan terminates, as there are no other nodes.

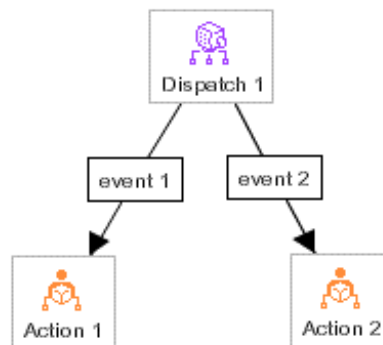
Dispatch Transitions

The *Dispatch Transition* type is used when the originating node is a Dispatch node. When the Trilogy MCC Workflow engine encounters a Dispatch node, it expects for an event to occur at that time, such as clicking a “Submit for Approval” button. The engine then checks

the **Event** property of each transition that leads from the Dispatch node, and executes that transition whose **Event** property has the name of the event that occurred. If no event occurred whose name matches the **Event** property of a transition, the engine waits for an event to occur before proceeding with execution of the workflow plan. For more information on events, refer to the *Trilogy MCC Workflow Developer's Guide*.

The properties of the Dispatch Transition are the **Type** property, the **X** and **Y** properties, and the **Event** property. The **X** and **Y** properties specify the position on the canvas of the transition handle. The **Event** property specifies the event that must occur for the engine to take this path.

The following diagram shows the typical usage of a Dispatch transition:



In the diagram above, the Action node `Action 1` executes only after the **Event** property of the Dispatch transition `event 1` occurs. Similarly, the Action node `Action 2` executes only after the **Event** property of the Dispatch transition `event 2` occurs.

Chapter 5: Roles and Users

This chapter explains how and when to create and define roles and users in a workflow plan using the Trilogy MCC Workflow Manager application. Topics include:

- Understanding Roles and Users
- Working with Roles
- Working with Users

Understanding Roles and Users

Every action node or approval node must specify a role or user. The assignment of a role or user to a node specifies who is allowed to perform the activity associated with that node. If a named user is assigned to a node, only that user is allowed to perform the activity. If a role is assigned to a node, any user assigned to that role may perform the activity.

Assigning a Role or Assigning a User

Although the Trilogy MCC Workflow engine supports specifying a named user instead of a role, this practice is strongly discouraged, as users frequently change responsibilities within an organization. If a named user is associated with an activity, all related workflow plans must be revised when the user changes roles. If roles are used, the method for routing work may be changed independently of the workflow plan.

If you need to assign a specific user to an activity, create a specialized role and assign it only to a single individual. This approach provides the benefits of named users with the flexibility of role assignment.

Working with Roles

Assign roles to nodes when you do not know the specific user that performs the activity represented by the node at the time you create the workflow plan. This section explains the following activities:

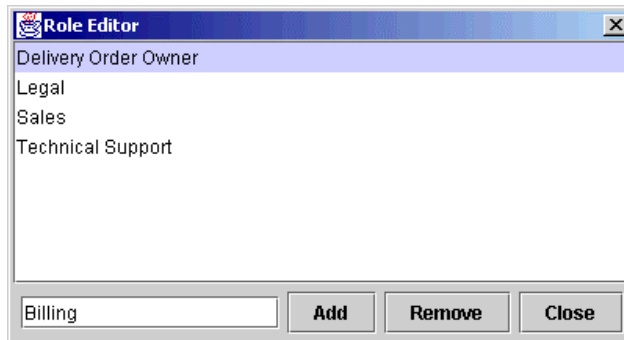
- Creating a Role
- Assigning Roles
- Highlighting Nodes Assigned to Roles
- Removing a Role

Creating a Role

You must create a role before you can assign it to a node. To create a role in the Trilogy MCC Workflow Manager application, complete the following steps:

Create a New Role

1. Select **Edit Roles...** from the **Tools** menu. The **Role Editor** window opens.
2. Type the name of the new role at the bottom of the **Role Editor** window.



3. Click **Add** to add the new role to the list of roles available to the workflow plan.

Assigning Roles

To assign an existing role in the Trilogy MCC Workflow Manager application, complete the following steps:

Assign an Existing Role to a Node

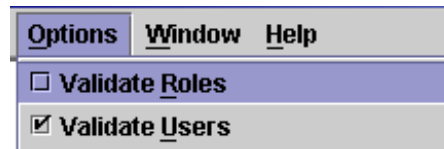
1. Click the node to which the role should be assigned.
2. Choose the appropriate role from the **Role** menu in the **Properties** window.



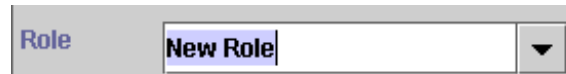
You can also assign roles may by typing the name of the role in the **Role** menu in the **Properties** window. This option is only available if the **Validate Roles** option is turned off. For more information on the Validate Roles option, see the [Options Menu](#) in Chapter 2: Getting Started. To assign a non-validated role in the Trilogy MCC Workflow Manager application, complete the following steps:

Assign an Existing Role to a Node

1. Make sure the **Validate Roles** item in the **Options** menu is unchecked.



2. Select the node to which you want to assign a role.
3. Type the name of the role at the top of the **Role** menu in the **Properties** window.



Note: It is rarely a good idea to assign non-validated roles to nodes, as misspellings are not checked.

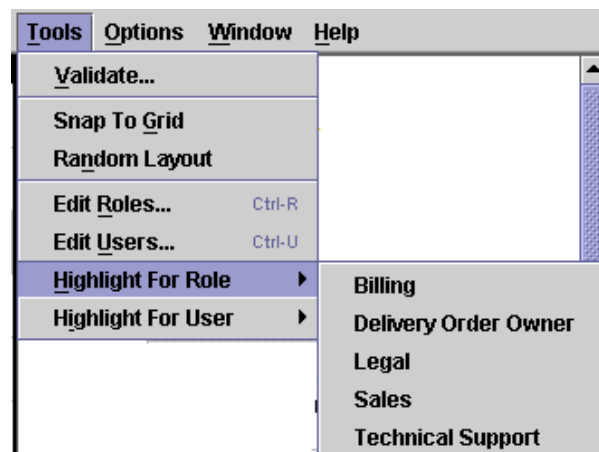
Highlighting Nodes Assigned to Roles

It is often convenient to highlight all the nodes associated with a particular role. For example, you may be asked to streamline the approval process where managers are concerned. You can highlight all nodes assigned to the `manager` role to make your job easier.

To highlight all nodes in a workflow plan that are associated with a particular role, complete the following steps:

Highlight Nodes Assigned to an Existing Role

1. Move your mouse cursor over the **Highlight for Role** item in the **Tools** menu. A list of roles displays to the right.



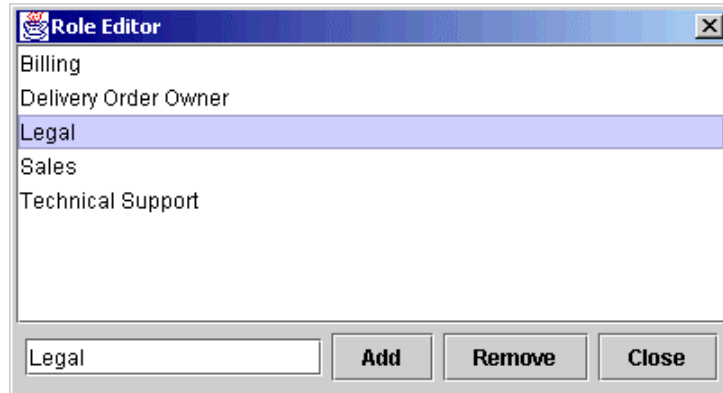
2. Select the appropriate role from the list. The Trilogy MCC Workflow Manager application highlights all nodes assigned to the selected role in that workflow plan.

Removing a Role

To remove a role from a workflow plan in the Trilogy MCC Workflow Manager application, complete the following steps:

Remove an Existing Role

1. Select **Edit Roles...** from the **Tools** menu. The **Role Editor** window opens.
2. Highlight the name of the role you want to remove from the list of available roles.



3. Click **Remove** to remove the role from the list of roles available to the workflow plan.

Working with Users

Users are assigned to nodes when the specific user that performs the activity represented by the node is known when creating the workflow plan, and only that specific individual is allowed to perform the activity. This section explains the following activities:

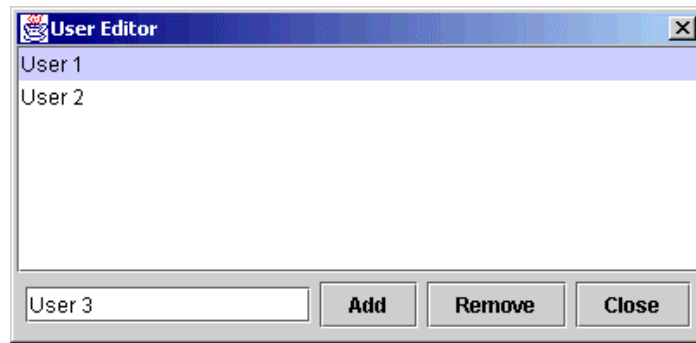
- Creating a User
- Assigning Users
- Highlighting Nodes Assigned to Users
- Removing a User

Creating a User

To create a user in the Trilogy MCC Workflow Manager application, complete the following steps:

Create a New User

1. Select **Edit Users...** from the **Tools** menu. The **User Editor** window opens.
2. Type the name of the new user at the bottom of the **User Editor** window.



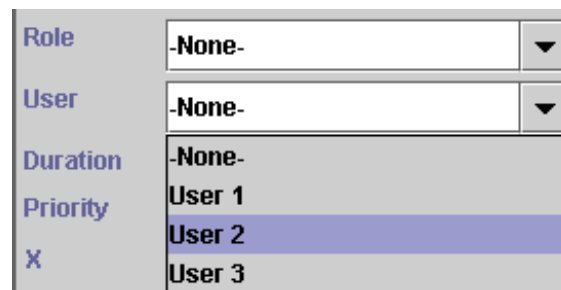
3. Click **Add** to add the new user to the list of roles available to the workflow plan.

Assigning Users

To assign an existing user in the Trilogy MCC Workflow Manager application, complete the following steps:

Assign an Existing User to a Node

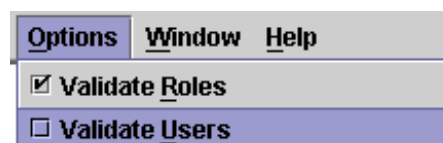
1. Select the node to which you want to assign the user.
2. Choose the appropriate user from the **User** menu in the **Properties** window.



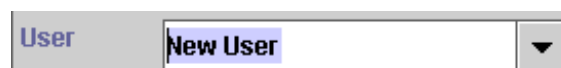
You can also assign users by typing the name of the user in the **User** menu in the **Properties** window. This option is only available if the **Validate Users** option is turned off. To assign a non-validated user in the Trilogy MCC Workflow Manager application, complete the following steps:

Assign a Non-Validated User to a Node

1. Make sure the **Validate Users** item in the **Options** menu is unchecked.



2. Select the node to which you want to assign the user.
3. Type the name of the user at the top of the **Role** menu in the **Properties** window.



Note: *It is rarely a good idea to assign non-validated users to nodes, as misspellings are not checked.*

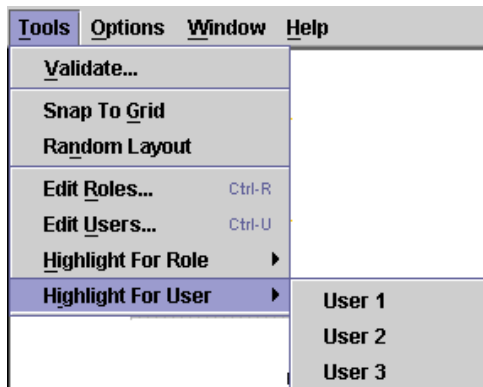
Highlighting Nodes Assigned to Roles

It is often convenient to highlight all the nodes associated with a particular user. For example, you may be asked to streamline the approval process where your boss is concerned. You can highlight all nodes assigned to your boss to make your job easier.

To highlight all nodes in a workflow plan that are associated with a particular user, complete the following steps:

Highlight Nodes Assigned to an Existing User

1. Move your mouse cursor over the **Highlight for User** item in the **Tools** menu. A list of users displays to the right.



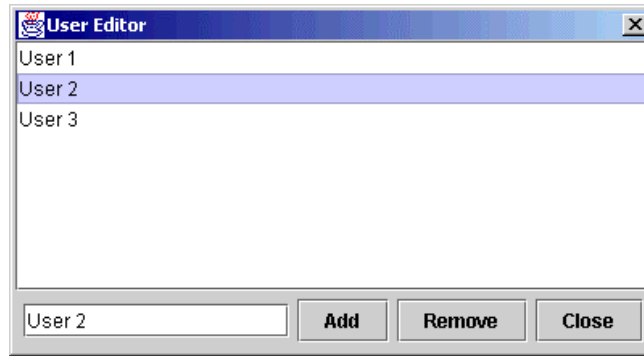
2. Select the appropriate user from the list. The Trilogy MCC Workflow Manager application highlights all nodes assigned to the selected user in that workflow plan.

Removing a User

To remove a user from a workflow plan in the Trilogy MCC Workflow Manager application, complete the following steps:

Remove an Existing User

1. Select **Edit Users...** from the **Tools** menu. The **Role Editor** window opens.
2. Highlight the name of the user to remove from the list of available users.



3. Click **Remove** to remove the user from the list of users available to the workflow plan.

Chapter 6: Validating and Saving Plans

This chapter explains how to validate and save a workflow plan using the Trilogy MCC Workflow Manager application. Topics discussed include:

- Validating a Workflow Plan
- Saving a Workflow Plan

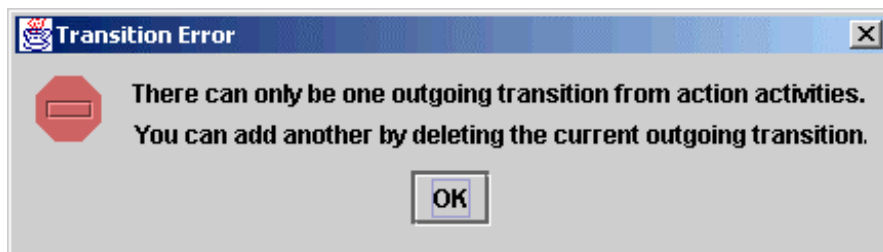
Validating a Workflow Plan

The Trilogy MCC Workflow Manager application provides several mechanisms for validating the current workflow plan. These mechanisms include:

- Transition Validation
- Manual Validation
- Role and User Validation

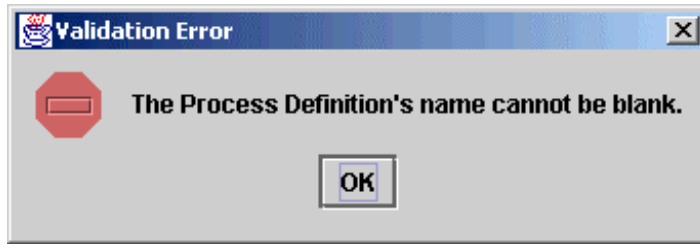
Transition Validation

As you add nodes and transitions, the Trilogy MCC Workflow Manager application ensures proper transitions placement. If you attempt to place a transition where it cannot go, the application displays an error message. For example, if you attempt to define two transitions from a single Action node, the Trilogy MCC Workflow Manager application displays a Transition Error message similar to the following:



Manual Validation

To ensure that a workflow plan works correctly with the Trilogy MCC Workflow engine, validate the workflow plan by selecting **Validate...** from the **Tools** menu. The Trilogy MCC Workflow Manager application checks all components of the workflow plan, to ensure that there are no errors or omissions that impede proper engine execution. If the Trilogy MCC Workflow Manager application encounters an error or omission during validation, it displays a Transition Error message. For example, if you validate a workflow plan before specifying the name of the plan, the application displays a Validation Error message, indicating that the name cannot be left blank.



Role and User Validation

The Trilogy MCC Workflow Manager application provides the option to validate the users and roles assigned to nodes. If the **Validate Roles** item on the **Options** menu is checked, you must select from a list of existing roles when assigning a role to a node. Similarly, if the **Validate Users** item of the **Options** menu is checked, you must select from a list of existing users when assigning a user to a node. For more information about roles and users, see [Chapter 5: Roles and Users](#).

Saving a Workflow Plan

The Trilogy MCC Workflow Manager application provides two mechanisms for saving a workflow plan. These mechanisms include:

- Saving as XML
- Saving as an image

Saving as XML

The Trilogy MCC Workflow engine only reads an XML representation of the workflow plan. To save a workflow plan as XML, complete the following steps:

Saving a Workflow Plan as XML

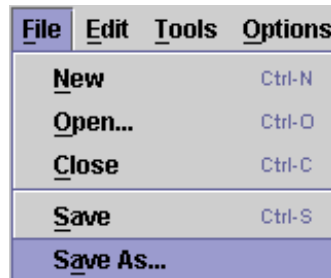
1. Select **Save** from the **File** menu. Alternatively, you can use the keyboard shortcut **Ctrl-S**.

File	Edit	Tools	Options
N ew			Ctrl-N
O pen...			Ctrl-O
C lose			Ctrl-C
S ave			Ctrl-S

Note: If you have saved the workflow plan before, the previously saved plan is overwritten. If you are saving the plan for the first time, the **Save as XML** window opens. Specify the location and name of the new workflow plan.

Saving a Workflow Plan as XML to a New Location or Name

1. Select **Save As...** from the **File** menu. The **Save as XML** window opens.



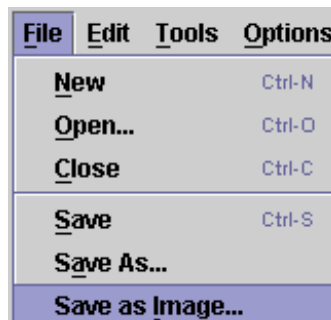
2. Specify the location and name of the workflow plan. Click **Save** to save the plan.

Saving as an Image

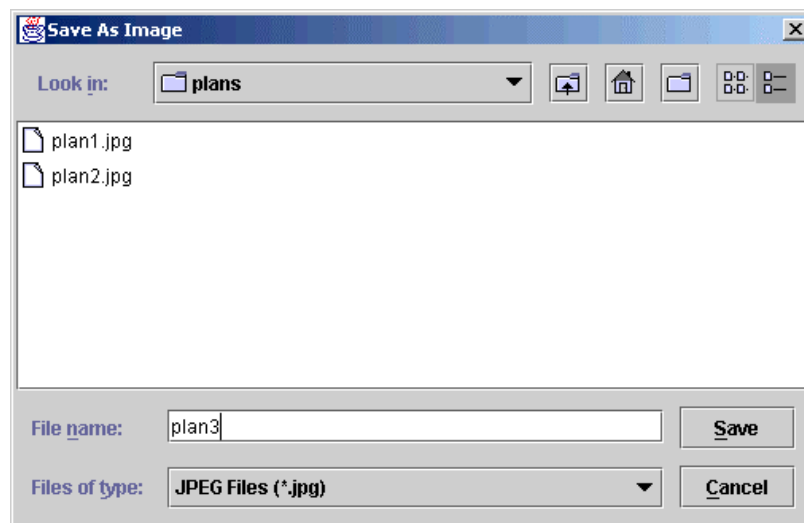
It is often convenient to create an image file that represents the workflow plan. For example, you might need to communicate the structure of the plan in a report or on a team web site. To save a workflow plan as a JPEG image file, complete the following steps:

Saving a Workflow Plan as an Image

1. Select **Save as Image...** from the **File** menu. The **Save As Image** window opens.



2. Specify the location and name of the image. Click **Save** to save the plan.



Glossary of Terms and Abbreviations

Action Node	<i>Activity node</i> that describes an activity that a user or application must perform.
Activity Node	A <i>node</i> that represents an activity that can be performed by a user, role, or the application. Types of Activity nodes include: <i>Action node</i> , <i>Approval node</i> , <i>Dispatch node</i> , and <i>Noop node</i> .
Approval Node	<i>Activity node</i> that details an approval decision that a user or a program must make.
Basic Transition	<i>Transition</i> that executes its <i>terminating node</i> immediately.
Branch Node	<i>Transition node</i> that has two branches and decides which branch to take without waiting for an event to be fired.
Case Node	<i>Transition node</i> that splits a process into any number of parallel paths.
Case Transition	<i>Transition</i> that executes its <i>terminating node</i> only if the Condition property of the transition evaluates to true .
Delay Node	<i>Transition node</i> that is simply a <i>Branch node</i> that executes after a specified delay.
Dispatch Node	<i>Activity node</i> that describes a decision that a user or application must make, and is followed by an unlimited number of paths. An event received by the <i>Trilogy MCC Workflow engine</i> determines which path to follow.
Dispatch Transition	<i>Transition</i> that executes its <i>terminating node</i> only after the event specified in the Event property of the transition has occurred.
Event	A user action that allows the Trilogy MCC Workflow engine to continue execution of the workflow plan. An example of an event is the clicking of a Submit button.
Fork Node	<i>Transition node</i> that splits parallel execution paths unconditionally. Converse of the <i>Join node</i> .
Join Node	<i>Transition node</i> that unites parallel branches back into a single path. Converse of the <i>Fork node</i> .
Node	A <i>workflow plan</i> element that describes a business activity, linked by causal relationships.
Noop Node	<i>Transition node</i> that is used when no action should be taken in the business process.
Originating Node	The <i>node</i> from which a <i>transition</i> leads.
Path	Another name for a <i>transition</i> .
Role	A group of users that have the same permissions or assignments
Root Node	The <i>node</i> in the workflow plan where execution begins.

SCFormula	A Trilogy format for a generic expression, such as <code>o.managerApproves()</code> or <code>x + 1 == y</code>
Sub-Process Node	<i>Activity node</i> that represents a <i>workflow plan</i> that is a part of a larger <i>workflow plan</i> .
Terminating Node	The <i>node</i> to which a <i>transition</i> leads.
Transition	Specifies the flow of control between <i>nodes</i> .
Transition Node	A <i>node</i> that controls the flow of the business process.
Trilogy MCC Workflow Engine	Software that uses workflow plans to implement business processes.
Trilogy MCC Workflow Manager	Application for creating workflow plans.
User	An individual that uses Trilogy Workflow-enabled software.
Workflow Plan	A flowchart representing a business process, used by the Trilogy MCC Workflow engine to enforce business rules.
Yes/No Transition	<i>Transition</i> that executes its <i>terminating node</i> only if the Yes/No property of the transition has the same value as the result of evaluating the Condition property of the <i>originating node</i> .

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