

Advanced Workflow

DIGGING DEEPER INTO THE FUNCTIONALITY
AND INTEGRATIONS OF LASERFICHE WORKFLOW

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SOLUTIONS LEAD

Today's Agenda

We will be covering:

Advanced Features
of the
Workflow Designer

Efficient and Effective
Workflow Design

Workflow
Administration
Console

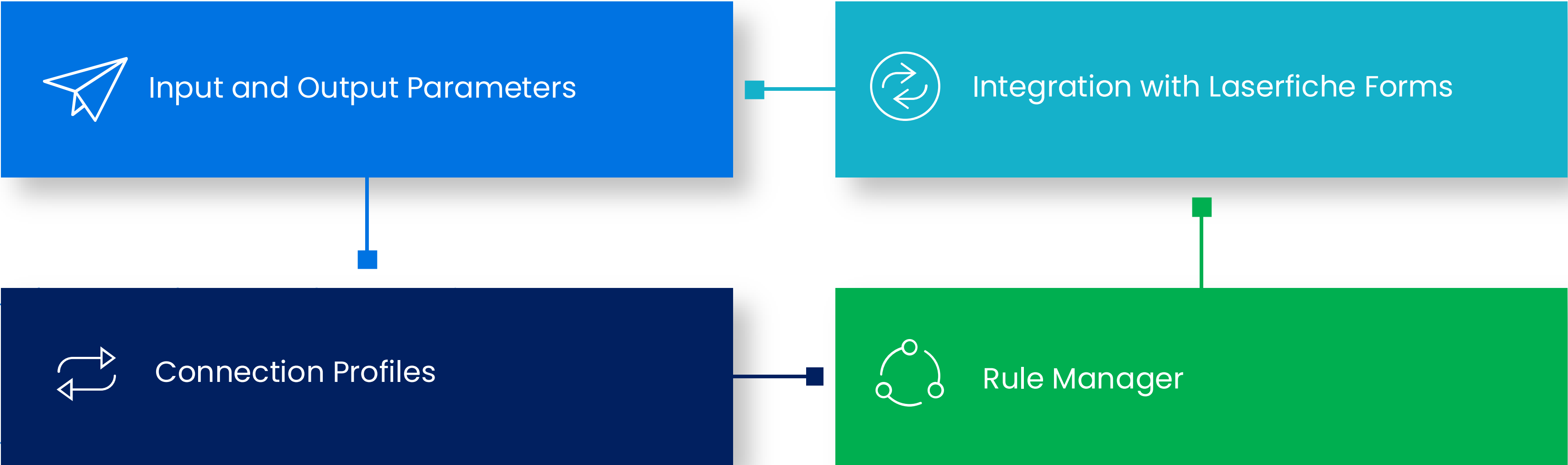


Advanced Features

————— WORKFLOW DESIGN —————

WORKFLOW DESIGN

Advanced Features



01

What are they?
Pre-configured tokens

02

Why are they used?
For passing values
For future logic

Input/Output Parameters

Workflow Parameters

Input Parameters:

Input Name	Multi-value	Default Value	Tags
Repository	☐	<Blank>	String
Template	☐	<Blank>	String
DocCat	☐	<Blank>	String
DocType	☐	<Blank>	String
DocDesc	☐	<Blank>	String

☐ Show alternative names for input parameters

Output Parameters:

Output Name	Multi-value	Tags
RetTrigger	☐	String
RetPeriod	☐	String
RetCalendar	☐	String
Security	☒	String
RecordSeries	☐	String
LookupStatus	☐	String
Trex	☐	String
CummulativeFol...	☐	String

☒ Use the Assign Token Values activity to set the values of output parameters

Buttons

Add Input

Remove

Add Output

Remove

OK

Cancel

Help

Configuring Parameters

Workflow Parameters

Input Parameters:

Input Name	Multi-value	Default Value	Tags
Repository	☐	<Blank>	String
Template	☐	<Blank>	String
DocCat	☐	<Blank>	String
DocType	☐	<Blank>	String
DocDesc	☐	<Blank>	String

☐ Show alternative names for input parameters

Output Parameters:

Output Name	Multi-value	Tags
RetTrigger	☐	String
RetPeriod	☐	
RetCalendar	☐	
Security	☒	
RecordSeries	☐	
LookupStatus	☐	
Trex	☐	
CummulativeFol...	☐	

☒ Use the Assign Token Values action

Select tags that describe this parameter:

Tag	Description
☒ String	A string token is any string of characters.
☐ Address	Represents a part of an address.
☐ Advanced	An advanced token will only be shown in the token list.
☐ Annotation	An annotation token is associated with a Laserfiche document.
☐ Boolean	A boolean token is either true or false.
☐ Byte Array	A byte array token is a sequence of bytes (unsigned integers).
☐ Character	A character token is a single text character.
☐ Count	A count token represents a count of something. It can be used to represent a count of documents or records.
☐ Currency	Represents a currency value.
☐ Date	A date token is a valid date value and does not include a time component.
☐ Date Time	A date time token is a valid date and time.

Properties

01-Retention Lookup

Workflow Name

01-Retention Lookup

Workflow Description

Connection Profiles

Student-Records: WORKFLOW@Student-Records
Employee-Records: WORKFLOW@Employee-Records

Manage workflow connection profiles...

Business Process Options

☐ Make this workflow a business process

Allow Laserfiche client applications to:

☐ Start this business process

☐ Display this business process's information when they are connected to:

<Select a connection profile>

More Options...

Input/Output Parameters

Input Parameters:
Repository, Template, DocCat, DocType, DocDesc

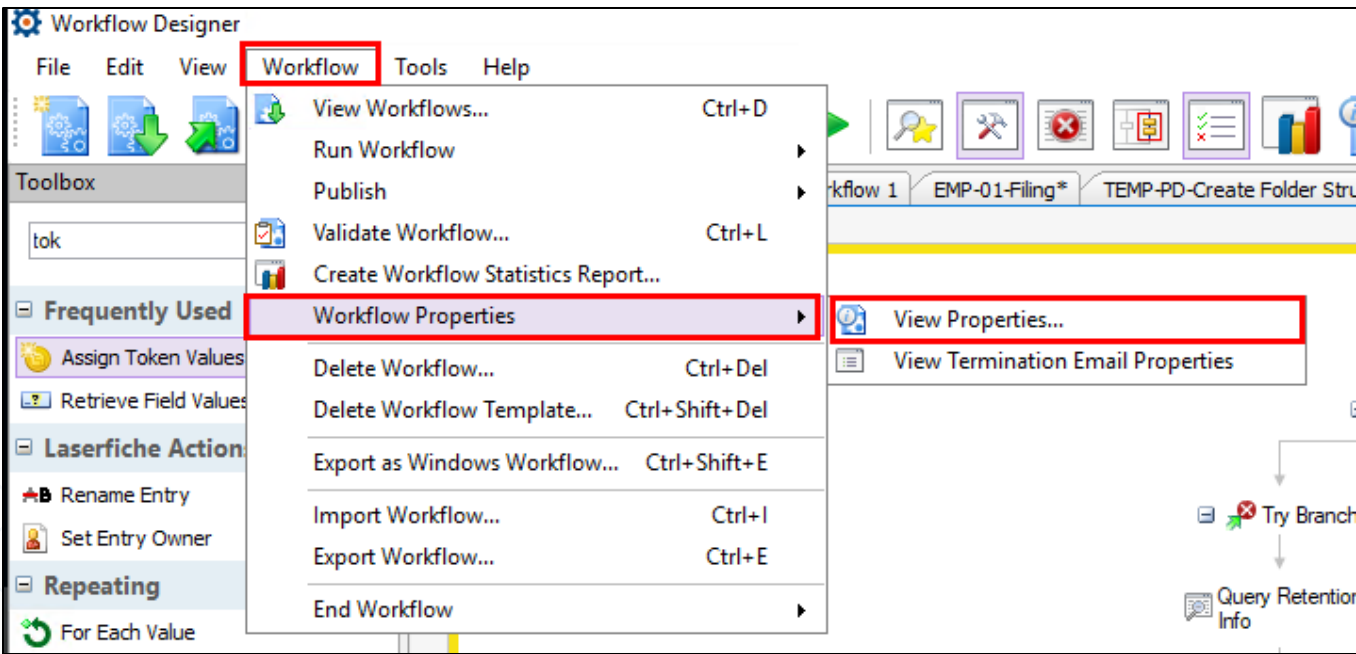
Output Parameters:
RetTrigger, RetPeriod, RetCalendar, Security, RecordSeries, LookupStatus, Trex, CummulativeFolder

Configure input/output parameters...

Properties

Integration with Forms

Workflow can accept values from and pass value to Laserfiche Forms.



General Author Statistics Summary File Versions

01-Retention Lookup

File:

Size:

Location:

Server: EC2AMAZ-98QNEKN

Published: Tuesday, September 21, 2021 9:37 AM

Version: 1

Attributes: ☐ Starting Entry ☒ Validate Design ☒ Started by Laserfiche Forms

Help OK Cancel

	Repository
	Template
	DocCat
	DocType
	DocDesc
	Submission Comment
	Submission Action
	Submission ID
	Submitter
	Submitter Account
	Submitter Email
	Submitter SID
	Form Name
	Form ID
	BP Instance ID
	BP Instance Name
	BP Name
	BP Start Date
	BP Initiator
	BP Initiator Account
	BP Initiator Email
	BP Initiator SID
	Forms Server
	BP ID
	Process Time Zone
	Submission Form Names
	Submission Steps
	Submission IDs
	Submission Actions
	Submission Comments
	Submission Timestamps
	Submission Submitter Accounts
	Submission Submitter SIDS
	Submission Submitters
	Submission Submitter Emails

Connection Profiles

What is it?

Repository Information
Workflow Specific

Why do we need it?

To Perform Tasks

What account?

Always use a dedicated
“WORKFLOW” account

Properties

01-Retention Lookup

Workflow Name

01-Retention Lookup

Workflow Description

Connection Profiles

Student-Records: WORKFLOW@Student-Records
Employee-Records: WORKFLOW@Employee-Records

[Manage workflow connection profiles...](#)

Business Process Options

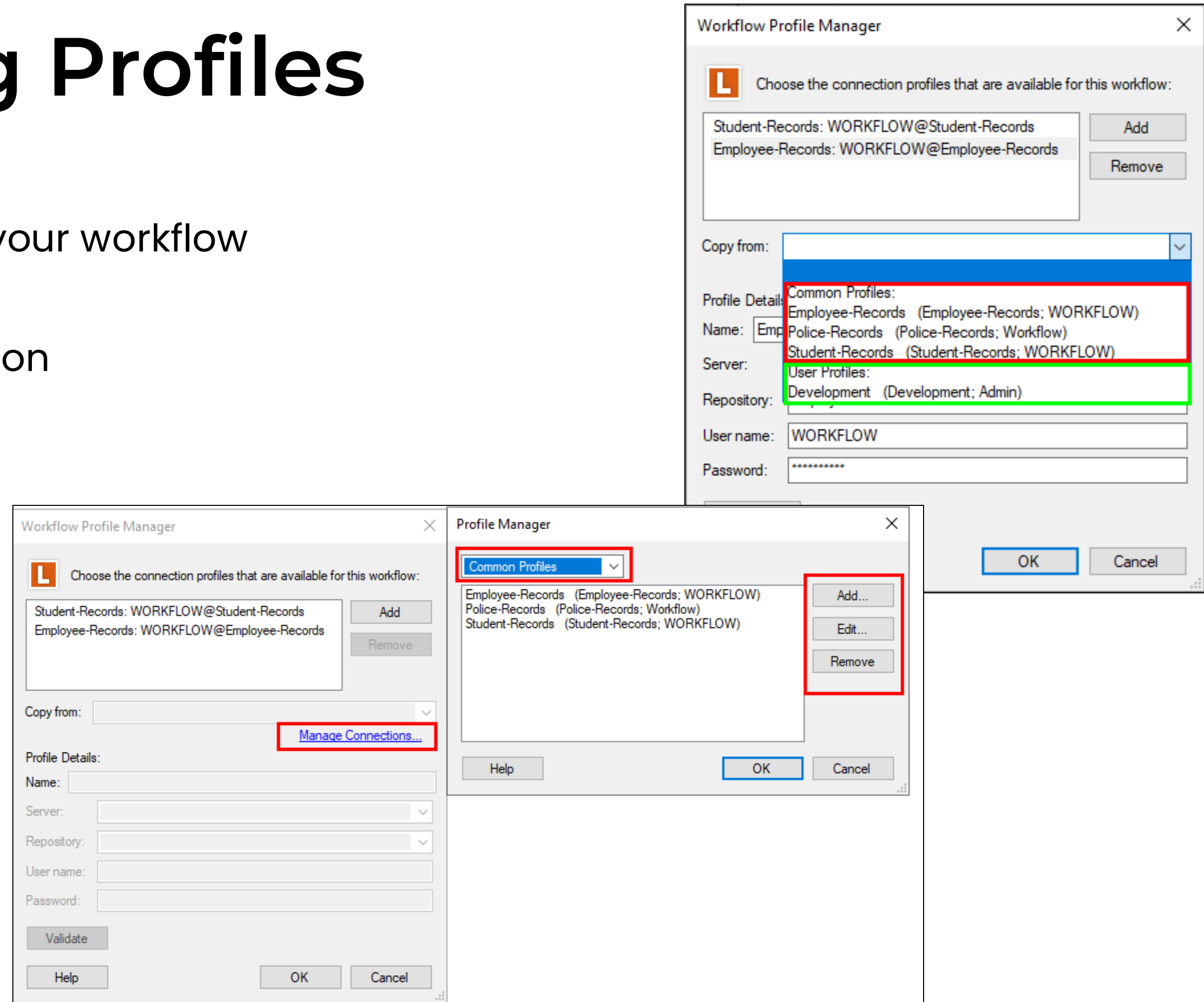
Configuring Profiles

Pre-configured profiles

- Use as a template for your workflow
- Used to copy settings
- Not an actual connection

Common profiles

- Available to any user



01

What is it?

- Primary tab to manage Workflows

02

What can you do?

- Add, configure, and remove starting rules
- Configure Business Process rules
- Open, Export, and Delete Workflows
- Organize your Workflows into folders

Rule Manager

Starting Rules:

Condition Starting Rule
Schedule Starting Rule
Business Process Rule

Condition Starting Rule

- Meet certain criteria
- Configuration is very important
- 7 different events

Event Type:	Entry Changed
	Entry Created
	Entry Deleted
	Entry Moved
	Entry Copied
	Entry Changed
	Entry Restored
	Document Signed

Rule Wizard

Starting Condition Properties

The conditions below will be evaluated when the Event Type occurs. Specify which repository's metadata will be available to the conditions with the "Get metadata from" drop-down menu.

Event Type: Entry Changed Get metadata from: Employee-Records (Employee-Records; WORKFLOW)

If all of these conditions are true

- 1 Entry : Type equals Document
- 2 User does not equal WORKFLOW
- 3 Entry : Template Name is in (Employee Records) Add Remove
- 4 Repository equals Employee-Records
- 5 If any of these conditions are true
- 6 Entry Changes include Template Field Set
- 7 Entry Changes include Template Assigned
- 8 Entry Changes include Template Field Deleted

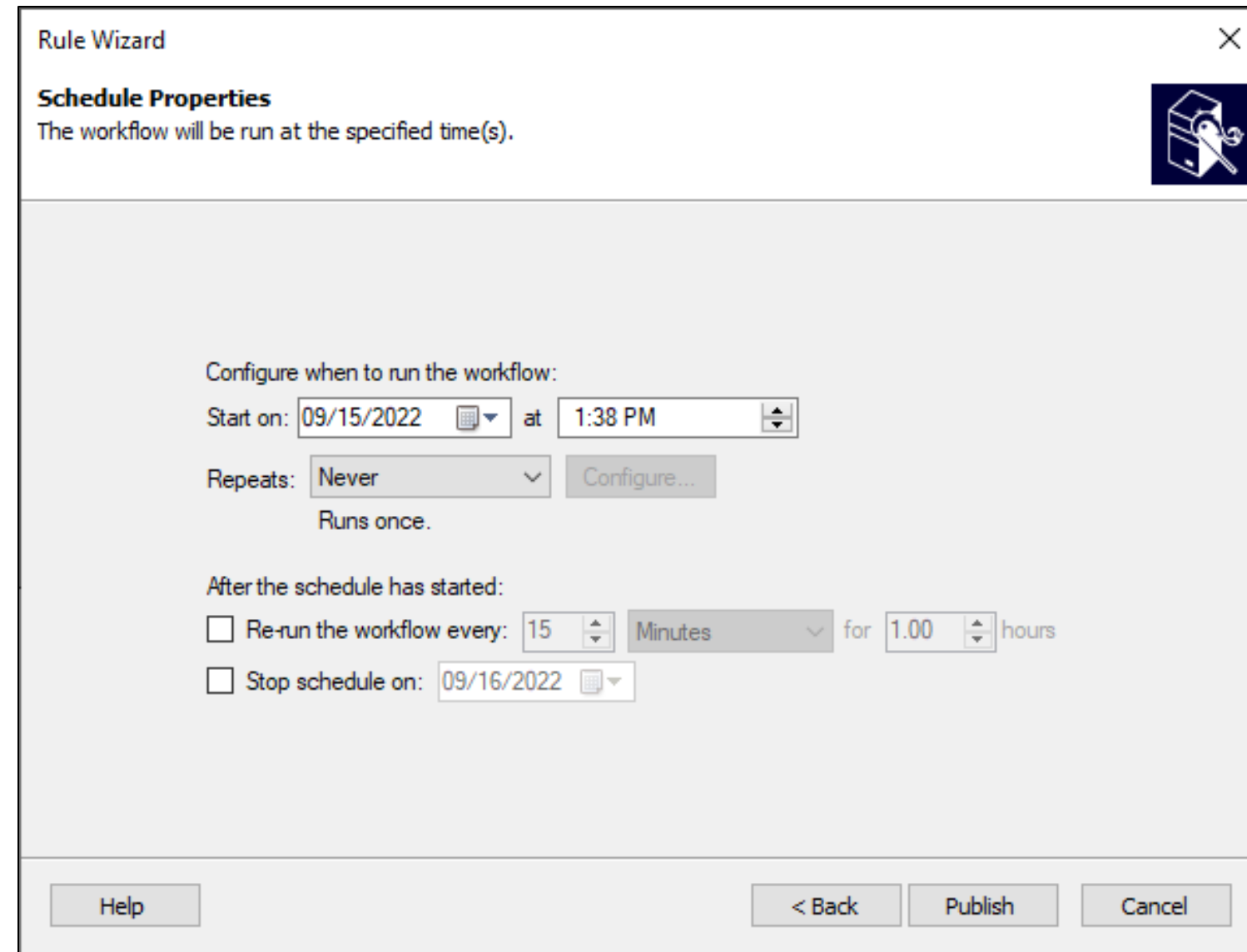
Add condition Add group

☐ Run workflow on the entry's folder (instead of the entry itself)

Help < Back Publish Cancel

Schedule Starting Rule

- Designated time or date
- Reoccurring / Certain days
- Routine



The screenshot shows the 'Rule Wizard' dialog box, specifically the 'Schedule Properties' tab. The title bar reads 'Rule Wizard' with a close button. The tab is labeled 'Schedule Properties' with a sub-header 'The workflow will be run at the specified time(s)'. The main area contains configuration options for when to run the workflow. Under 'Configure when to run the workflow:', there is a 'Start on:' field set to '09/15/2022' at '1:38 PM'. Below this, 'Repeats:' is set to 'Never' with a 'Configure...' button and the text 'Runs once.'. Under 'After the schedule has started:', there are two checkboxes: 'Re-run the workflow every:' (unchecked) with a value of '15' minutes for '1.00' hours, and 'Stop schedule on:' (unchecked) with a date of '09/16/2022'. The bottom of the dialog has buttons for 'Help', '< Back', 'Publish', and 'Cancel'.

Rule Wizard

Schedule Properties
The workflow will be run at the specified time(s).

Configure when to run the workflow:

Start on: 09/15/2022 at 1:38 PM

Repeats: Never Configure...
Runs once.

After the schedule has started:

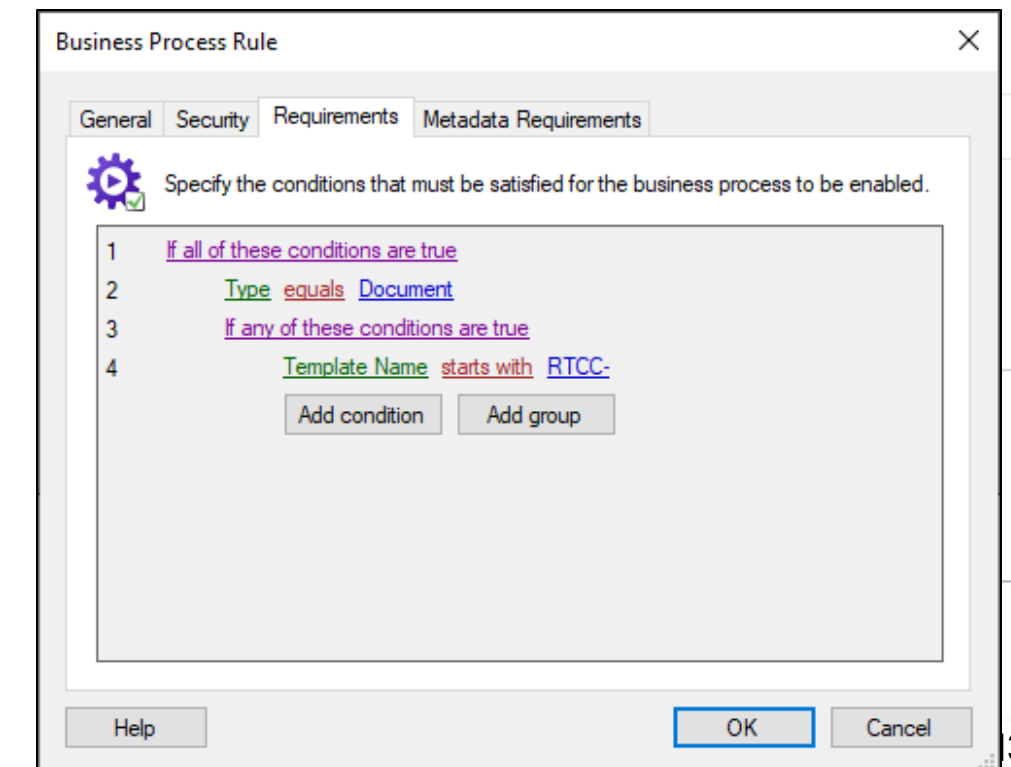
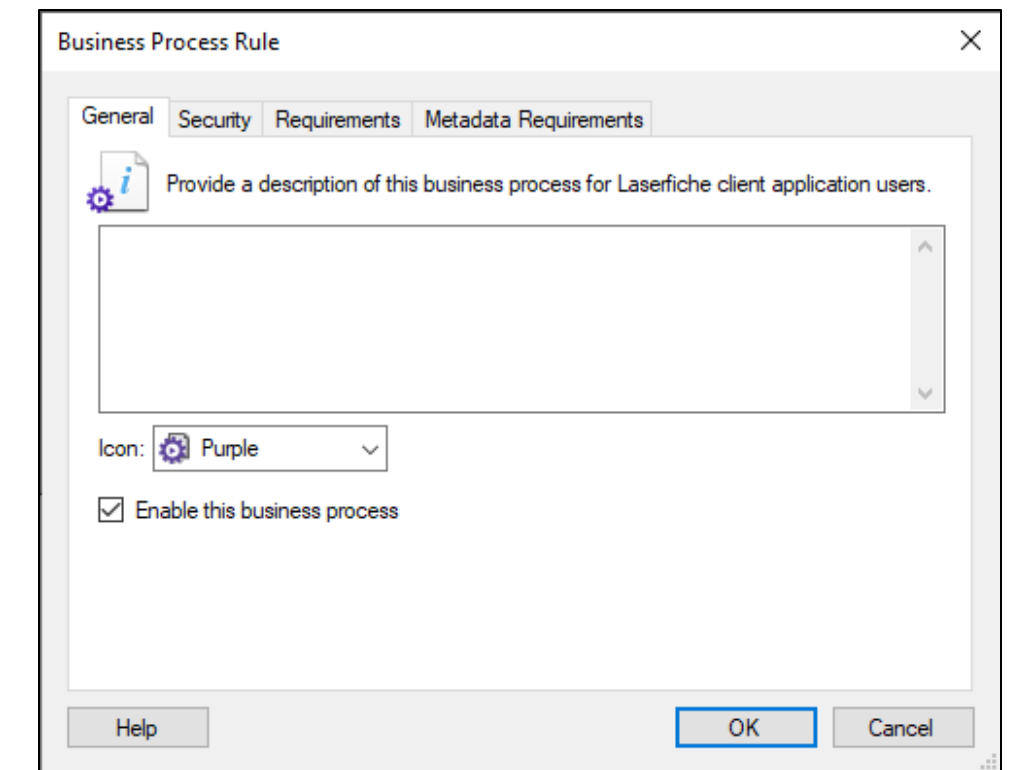
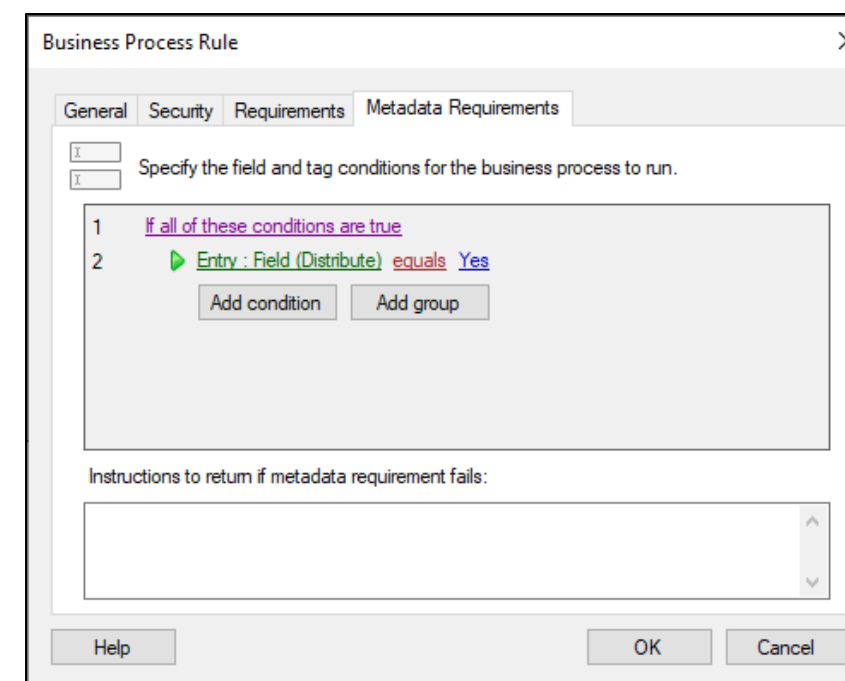
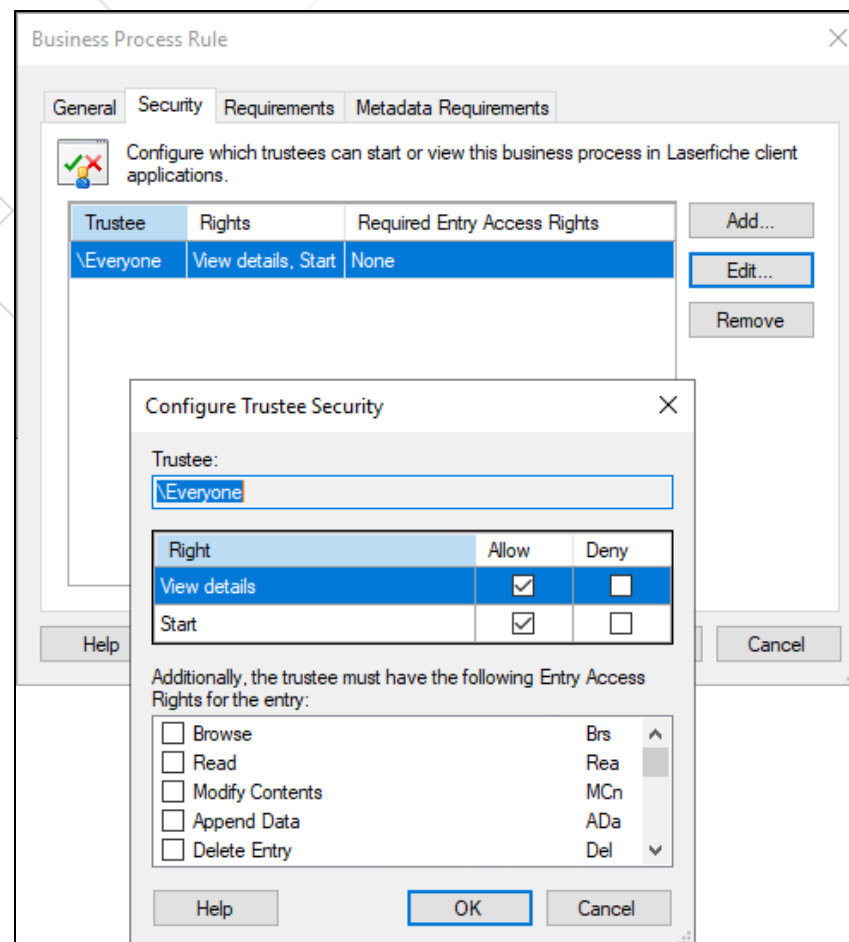
☐ Re-run the workflow every: 15 Minutes for 1.00 hours

☐ Stop schedule on: 09/16/2022

Help < Back Publish Cancel

Business Process Rule

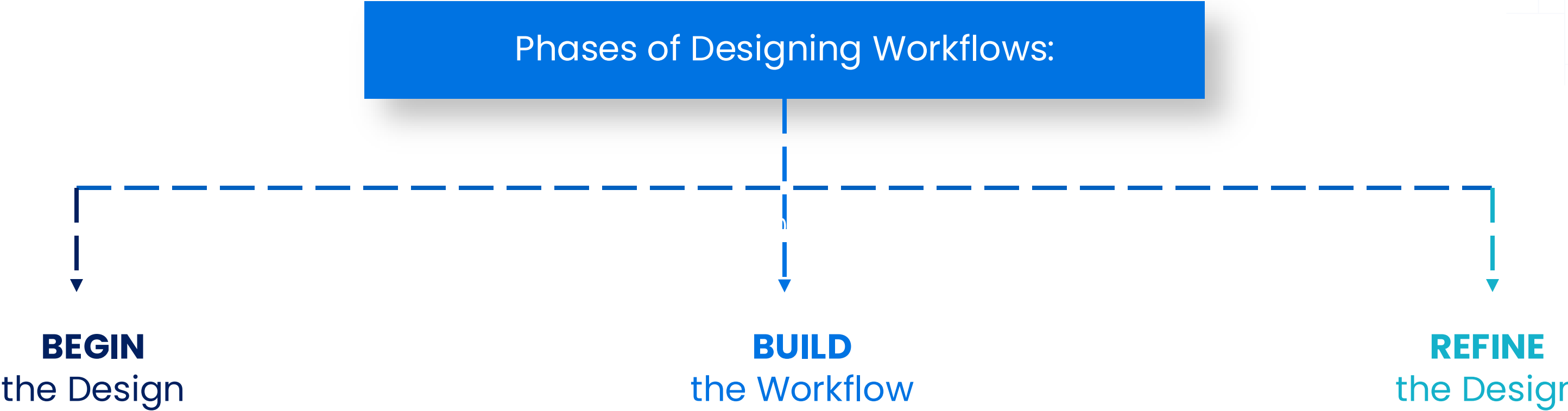
- Triggered Manually
- Used to:
 - Change color of icon
 - Restrict, Set Requirements



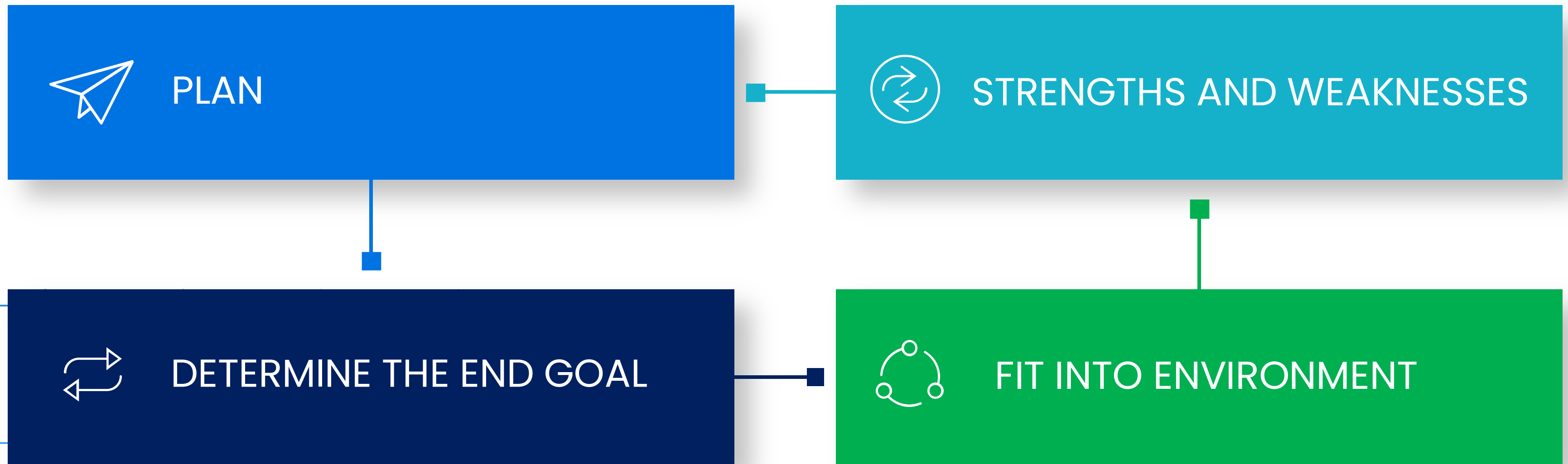


Efficient and Effective

WORKFLOW DESIGN



Beginning the Design



OUR Questions



FIRST

What is the purpose of my workflow?



SECOND

How will my workflow be used?



THIRD

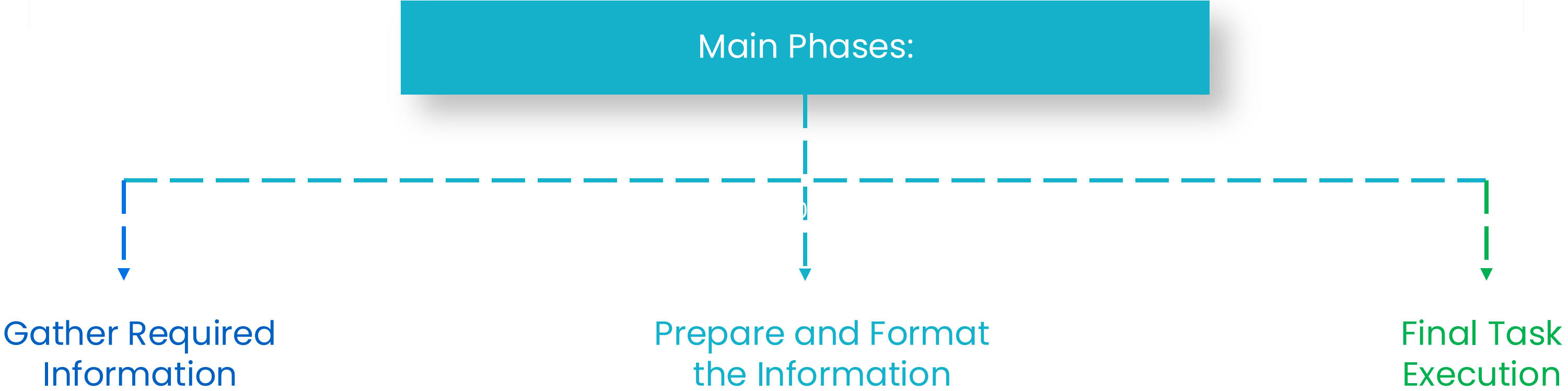
At what scale will my workflow perform its tasks?



FOURTH

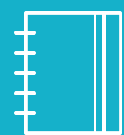
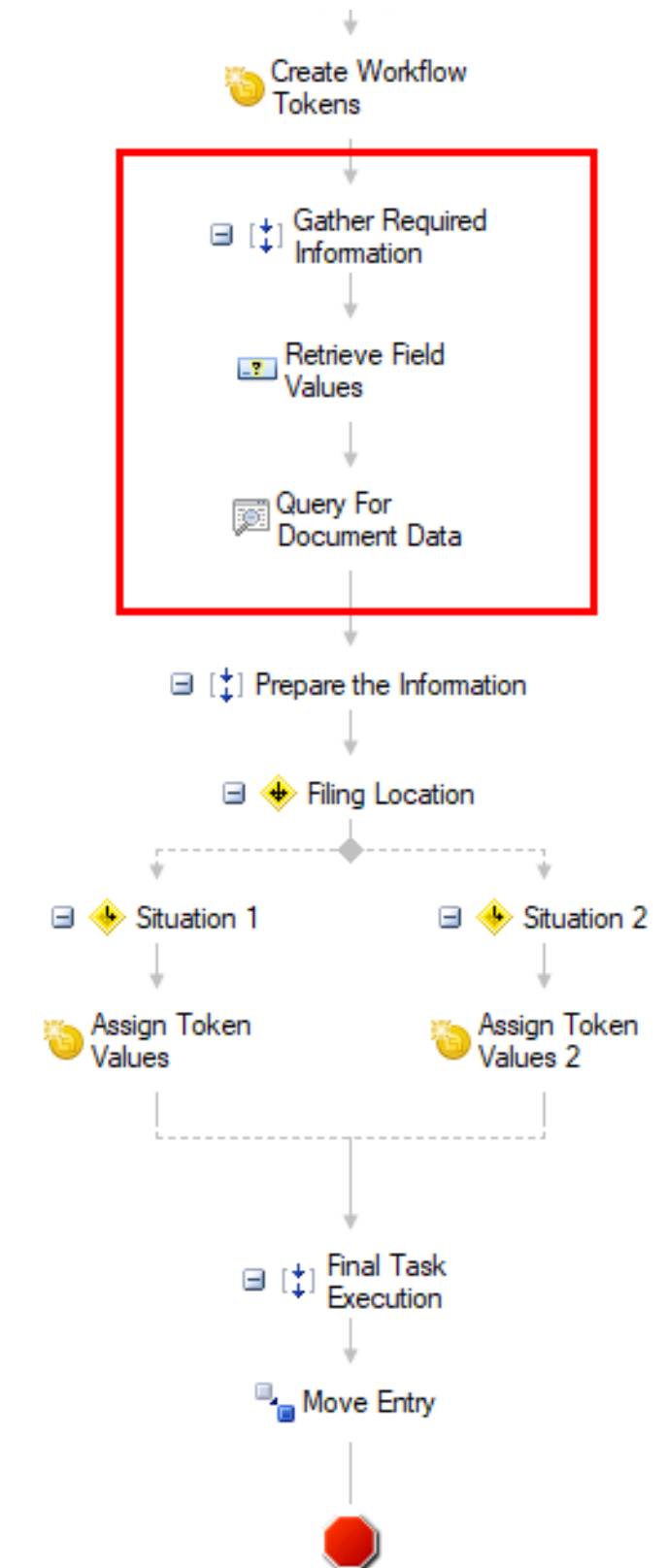
How will my workflow interact with the existing environment?

Building the Workflow



Gathering Required Information

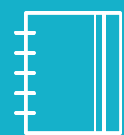
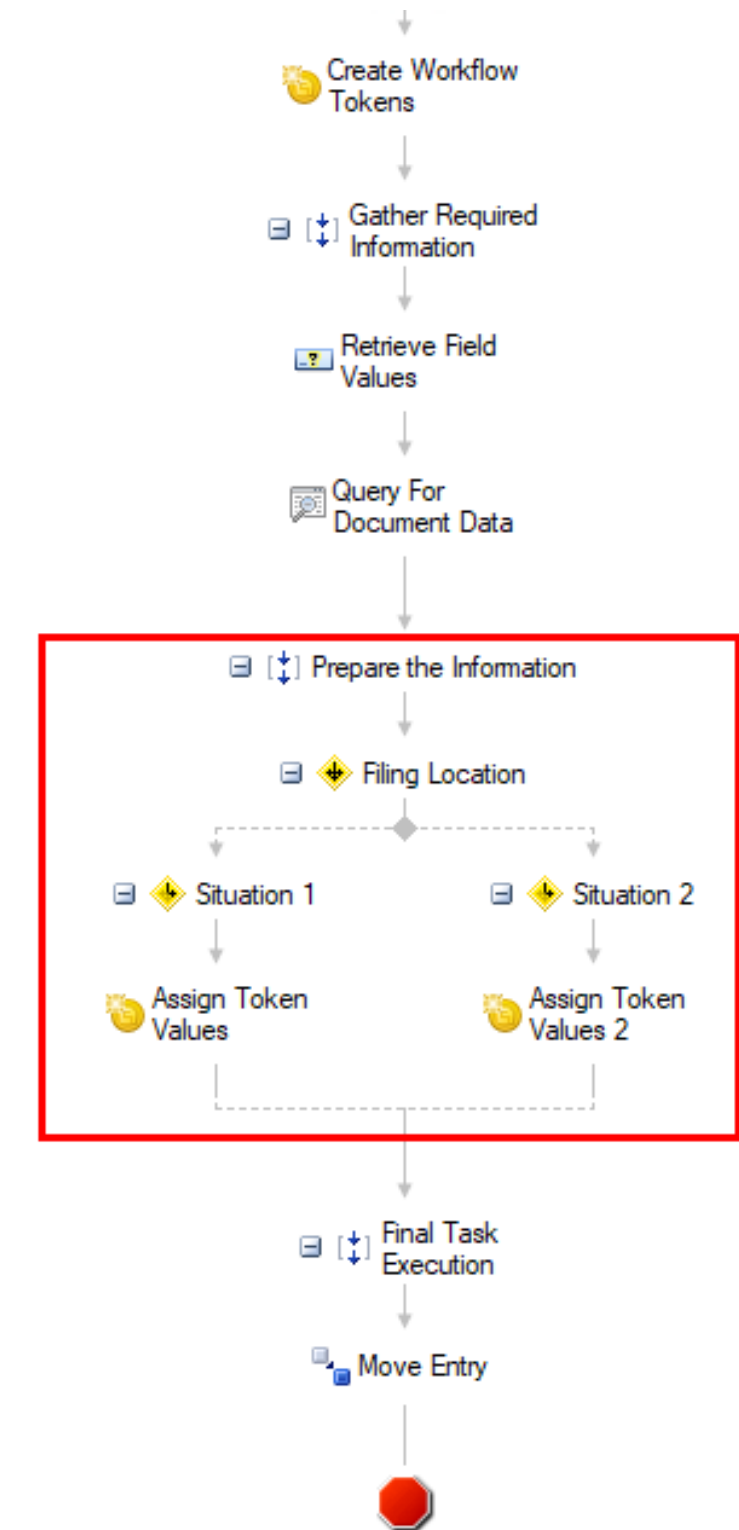
- Query a SQL Database
- Retrieve document metadata
- Pull information from a Forms Process
- Use Search Activities to identify the correct entries



Utilize error checking, effectively format token values, and enforce standardization policies.

Preparing the Information

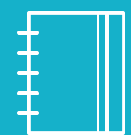
- Use regular expressions
- Apply additional metadata
- Determine future tasks
- Format additional information



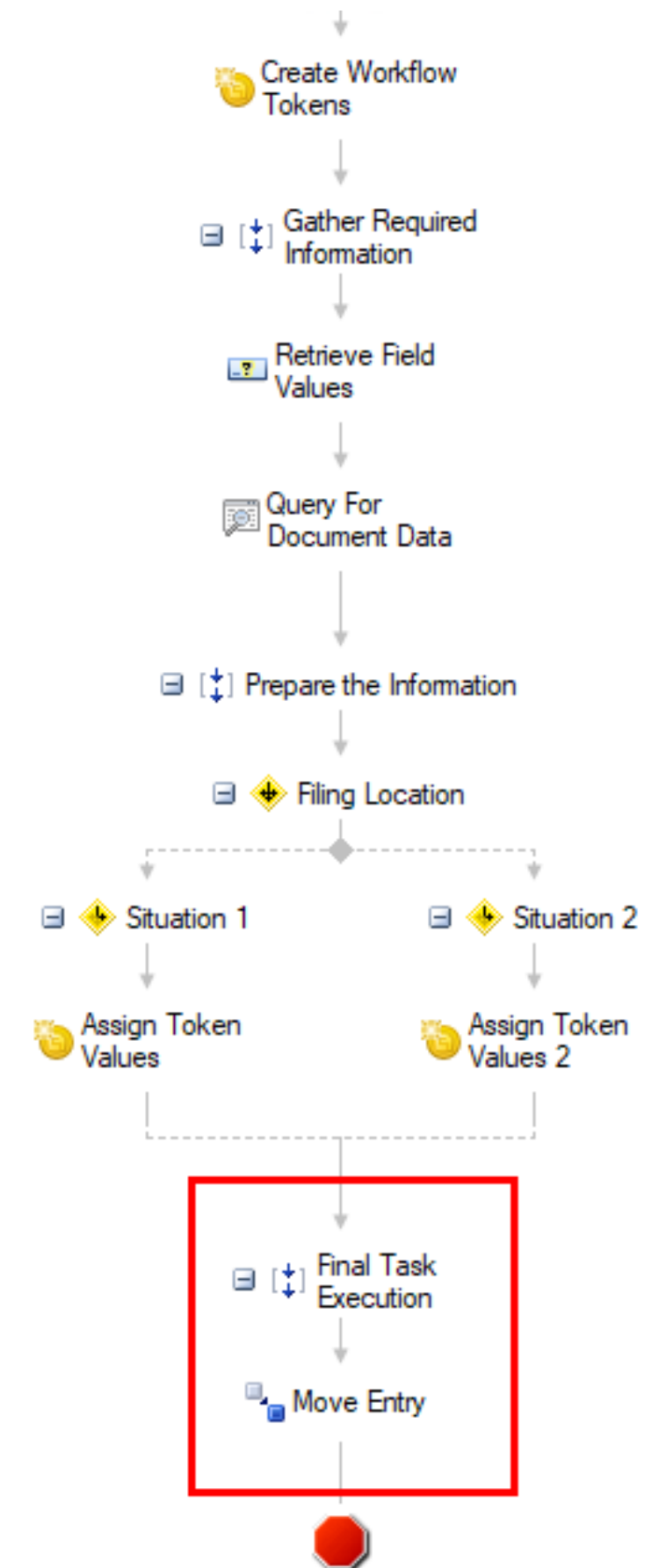
Often this phase will determine the result of logic built into the Workflow later in the process.

Final Task Execution

- Move/Create/Delete/Rename Entries
- Migrate Entries
- Assign Field Values



Prevent harmful actions from executing if information is missing or incorrect.



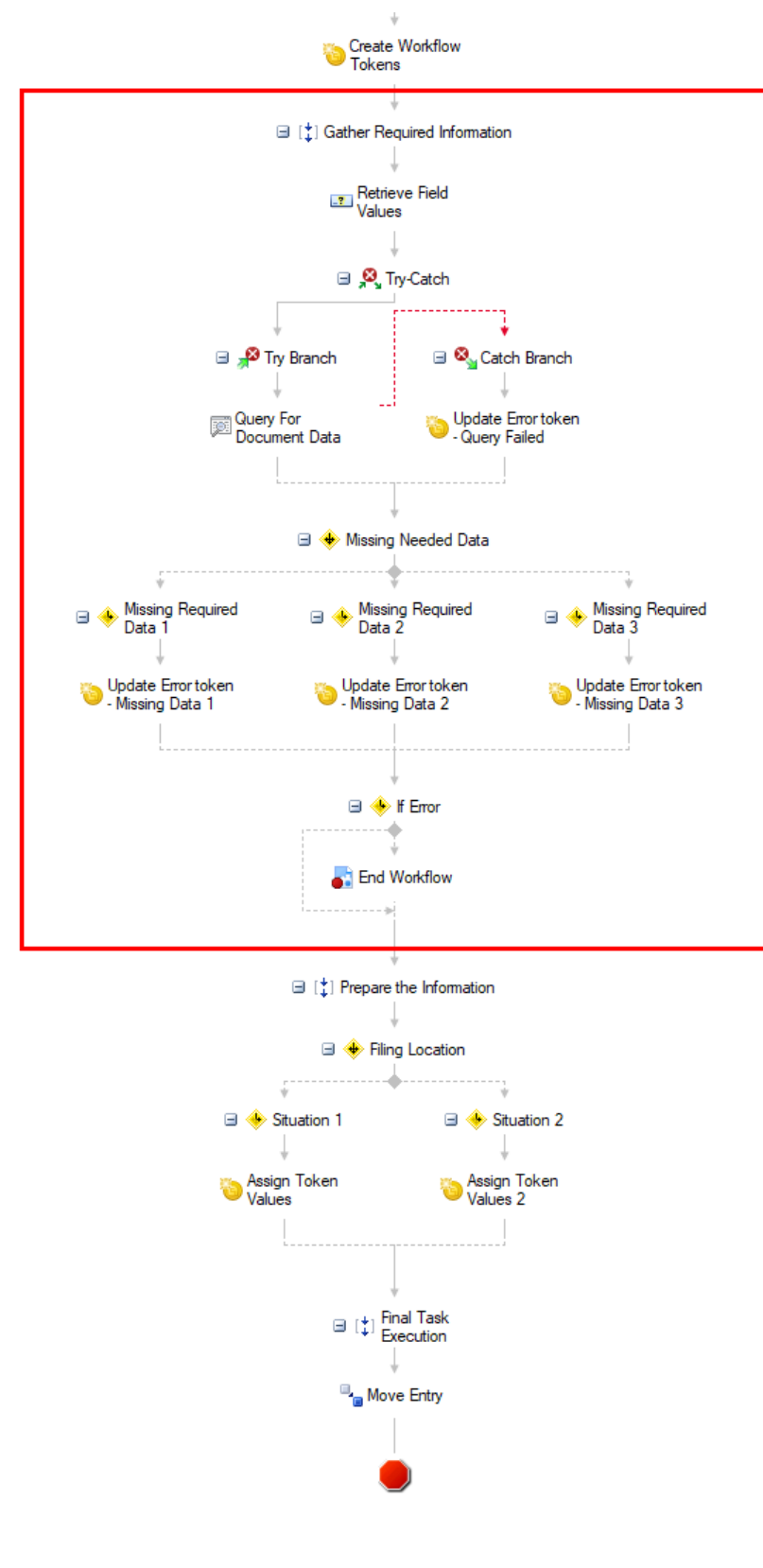
Refining the Design

Add features for more functionality, better performance, and easier maintenance.

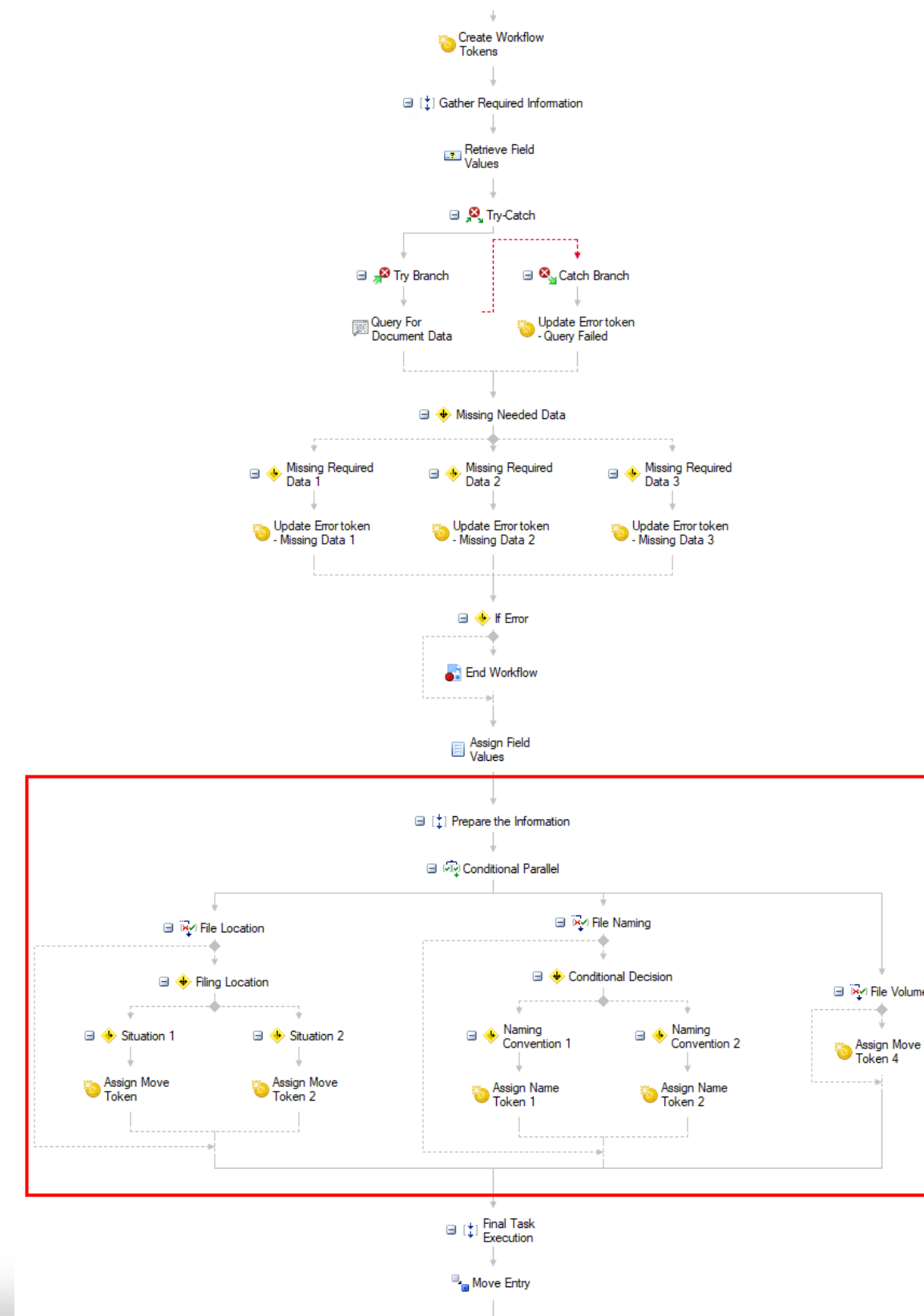
Example adjustments:

- Adding error handling
- Consolidating token creation/formatting activities
- Adding additional conditional branches
- Adding/Adjusting starting rules

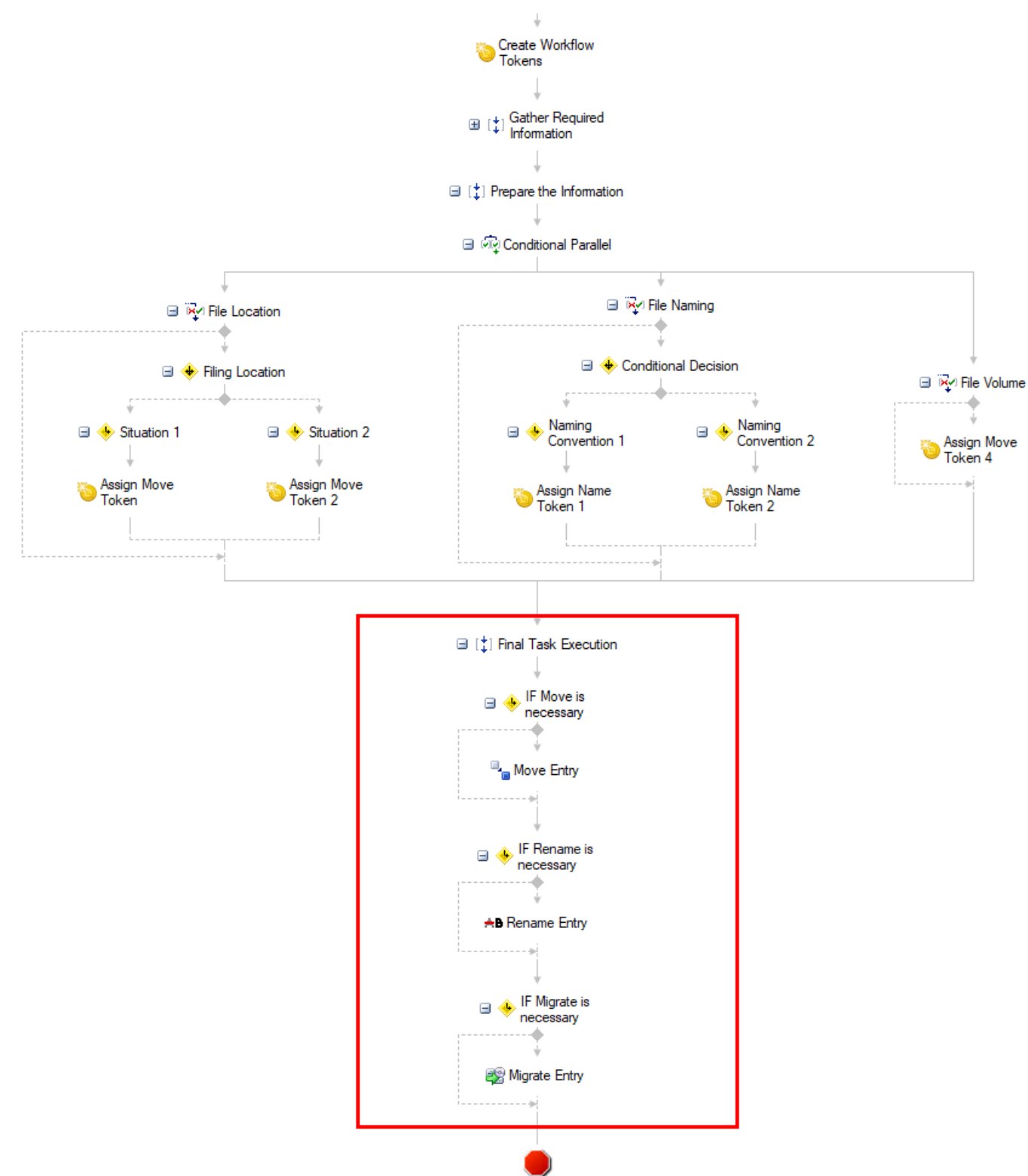
Often discovered through testing.



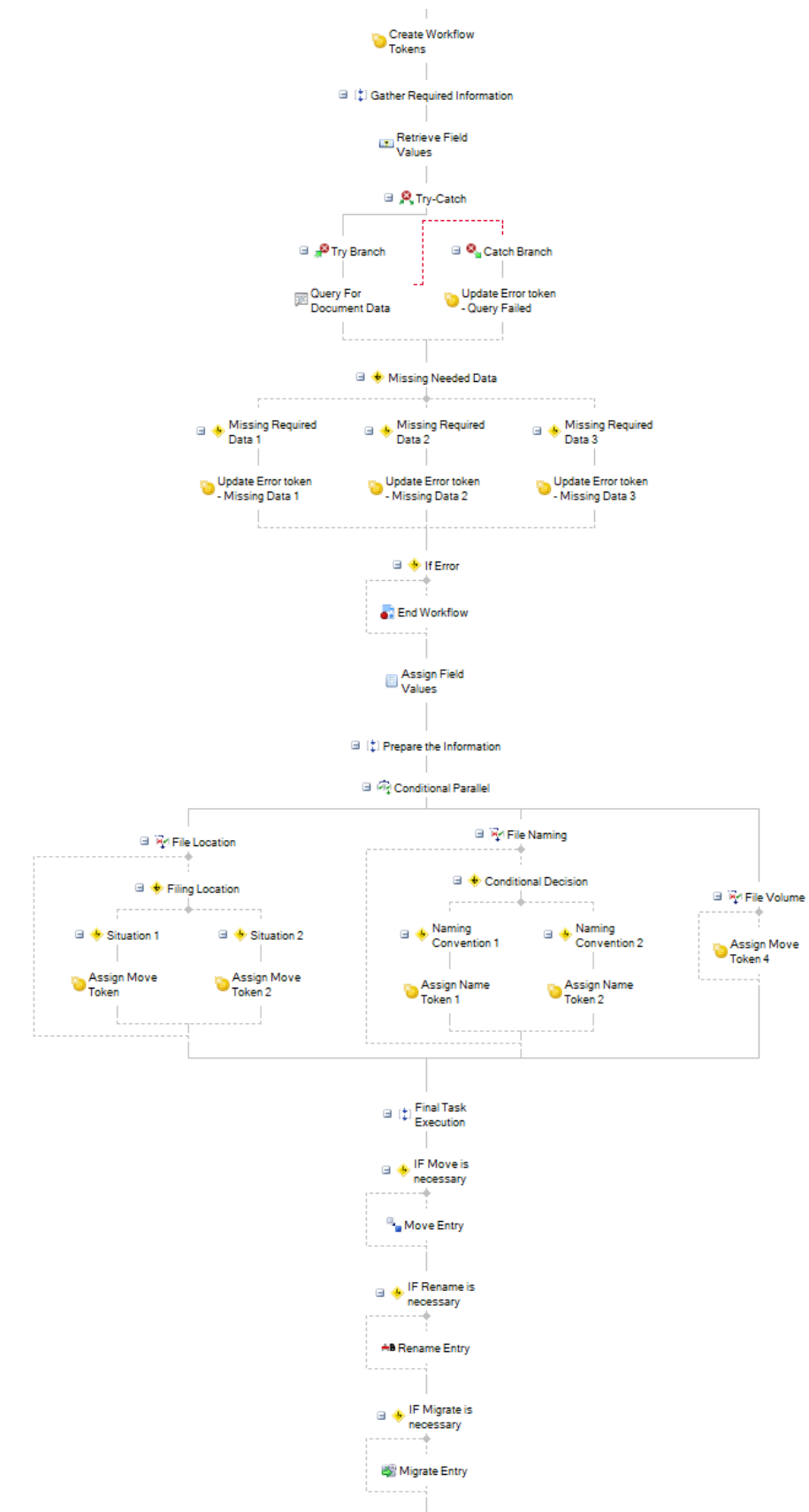
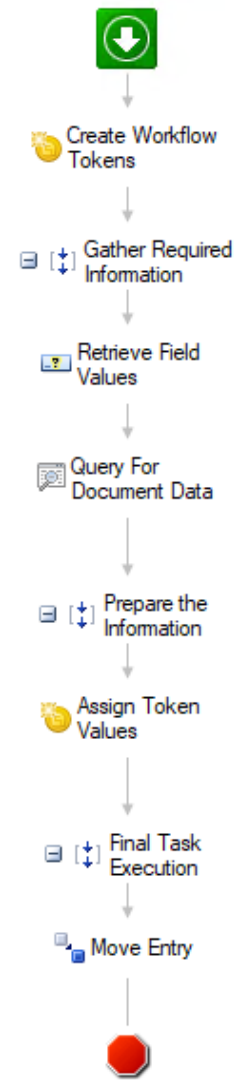
Gathering Information - Refined



Preparing Information - Refined



Final Task Execution - Refined



Refinement Final Result



Administration Console

WORKFLOW

Key Functions

01



Monitoring
Workflow Activity

Configuring
External Objects



02

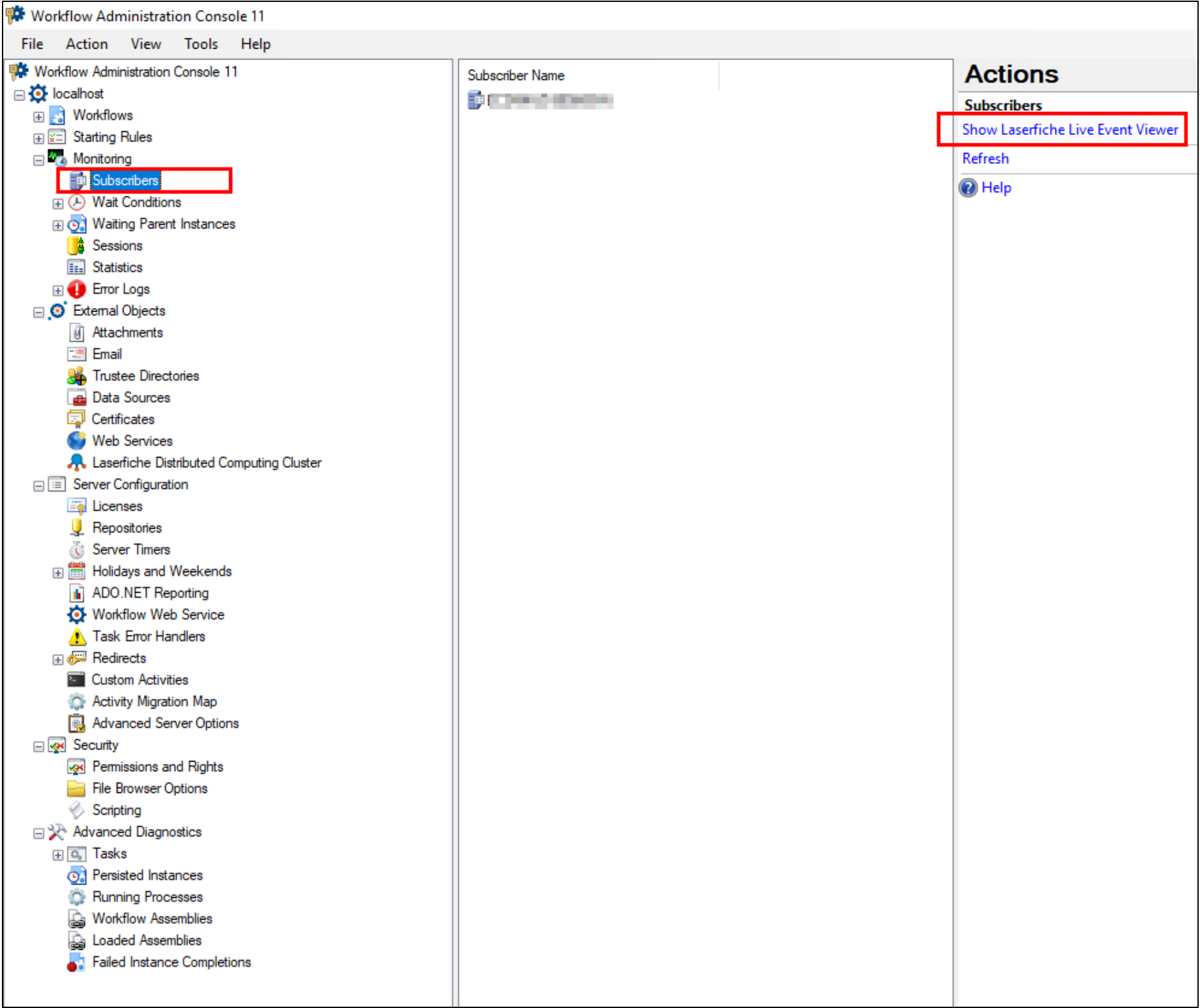
03



Configuring Workflow
Server Settings

Monitoring Workflow Activity

Subscribers



Monitoring Workflow Activity

Wait Conditions

Workflow Administration Console 11

File Action View Tools Help

Workflow Administration Console 11

localhost

Workflows

Starting Rules

Monitoring

Subscribers

Wait Conditions

01-Calculate Retention Year

01-Retention Lookup

01SHARED-Upload Form PDF Converter

Create Forms Instances

EMP-01-Filing

EMP-EMP-00-Contracts Process-Create Contracts

EMP-EMP-00-Contracts Process-Create Contracts (2)

EMP-EMP-00-Update Employee Metadata & Clean

EMP-EMP-Process

Employee Information

PD-01-Filing

PD-DATA-Case Lookup

PD-DATA-Evidence Lookup

PD-PD-Process

TEST-Convert Word Doc to Entry

Waiting Parent Instances

Sessions

Statistics

Error Logs

External Objects

Attachments

Email

Trustee Directories

Data Sources

Certificates

Web Services

Laserfiche Distributed Computing Cluster

Server Configuration

Licenses

Repositories

Server Timers

Holidays and Weekends

ADO.NET Reporting

Workflow Web Service

Task Error Handlers

Redirects

Custom Activities

Activity Migration Map

Advanced Server Options

Security

Permissions and Rights

File Browser Options

Scripting

Advanced Diagnostics

Tasks

Persisted Instances

Running Processes

Workflow Assemblies

Loaded Assemblies

Failed Instance Completions

Name

01-Calculate Retention Year

01-Retention Lookup

01SHARED-Upload Form PDF Converter

Create Forms Instances

EMP-01-Filing

EMP-EMP-00-Contracts Process-Create Contracts

EMP-EMP-00-Contracts Process-Create Contracts (2)

EMP-EMP-00-Update Employee Metadata & Clean

EMP-EMP-Process

Employee Information

PD-01-Filing

PD-DATA-Case Lookup

PD-DATA-Evidence Lookup

PD-PD-Process

TEST-Convert Word Doc to Entry

Actions

Wait Conditions

Refresh

Help

Monitoring Workflow Activity

Statistics

Workflow Administration Console 11

File Action View Tools Help

Workflow Administration Console 11

localhost

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Wait Conditions

Waiting Parent Instances

Sessions

Statistics

Error Logs

Current error logs

All error logs

External Objects

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Persisted Instances

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Workflow Assemblies

Loaded Assemblies

Failed Instance Completions

Workflow Name	Workflow ID	Version	Total Instances	Running Instanc...	Completed Insta...	Terminated Insta...	Average Time	Maximum Time	Minimum Time
Employee Information	2	3	1	0	1	0	27 ms	27 ms	27 ms
01-Calculate Retention Year	6	1	20	0	20	0	49 ms	200 ms	27 ms
EMP-01-Filing	7	1	1	0	0	1	12 h 16 m	12 h 16 m	12 h 16 m
01-Retention Lookup	11	1	62	0	62	0	644 ms	2 s 70 ms	540 ms
TEST-Convert Word Doc to...	12	1	1	0	1	0	523 ms	523 ms	523 ms
TEST-Convert Word Doc to...	12	2	1	0	1	0	4 s 263 ms	4 s 263 ms	4 s 263 ms
PD-01-Filing	13	2	34	0	34	0	708 ms	2 s 987 ms	37 ms
PD-01-Filing	13	3	21	0	21	0	460 ms	1 s 307 ms	123 ms
PD-DATA-Case Lookup	14	3	4	0	4	0	2 s 43 ms	2 s 80 ms	2 s 27 ms
PD-DATA-Case Lookup	14	4	2	0	2	0	2 s 45 ms	2 s 53 ms	2 s 37 ms
PD-DATA-Case Lookup	14	5	13	0	13	0	2 s 36 ms	2 s 60 ms	2 s 10 ms
PD-DATA-Case Lookup	14	7	17	0	17	0	2 s 111 ms	2 s 283 ms	2 s 10 ms
PD-PD-Process	15	1	1	0	1	0	46 s 567 ms	46 s 567 ms	46 s 567 ms
PD-PD-Process	15	2	2	0	2	0	4 s 790 ms	6 s 177 ms	3 s 403 ms
PD-PD-Process	15	3	3	0	3	0	4 s 583 ms	6 s 133 ms	3 s 640 ms
PD-PD-Process	15	5	6	0	6	0	4 s 251 ms	5 s 327 ms	3 s 580 ms
PD-PD-Process	15	6	4	0	4	0	3 s 506 ms	3 s 960 ms	3 s 313 ms
PD-PD-Process	15	7	1	0	1	0	2 s 10 ms	2 s 10 ms	2 s 10 ms
PD-PD-Process	15	8	3	0	3	0	1 s 813 ms	3 s 293 ms	1 s 33 ms
PD-PD-Process	15	9	2	0	2	0	258 ms	280 ms	237 ms
PD-PD-Process	15	10	2	0	2	0	4 s 120 ms	4 s 930 ms	3 s 310 ms
PD-PD-Process	15	12	1	0	1	0	3 s 873 ms	3 s 873 ms	3 s 873 ms
PD-PD-Process	15	13	2	0	2	0	4 s 803 ms	4 s 807 ms	4 s 800 ms
PD-PD-Process	15	14	8	0	8	0	4 s 620 ms	5 s 563 ms	3 s 213 ms
PD-PD-Process	15	15	5	0	5	0	3 s 191 ms	4 s 843 ms	1 s 23 ms
PD-PD-Process	15	16	2	0	2	0	2 s 32 ms	2 s 987 ms	1 s 77 ms
PD-PD-Process	15	19	1	0	1	0	3 s 860 ms	3 s 860 ms	3 s 860 ms
PD-PD-Process	15	20	29	0	29	0	2 s 572 ms	5 s 300 ms	273 ms
PD-PD-Process	15	21	1	0	1	0	1 s 343 ms	1 s 343 ms	1 s 343 ms
PD-PD-Process	15	22	2	0	2	0	4 s 202 ms	4 s 730 ms	3 s 673 ms
PD-DATA-Evidence Lookup	16	3	1	0	1	0	2 s 57 ms	2 s 57 ms	2 s 57 ms
PD-DATA-Evidence Lookup	16	4	15	0	15	0	2 s 120 ms	2 s 543 ms	2 s 13 ms

Actions

Statistics

Create Statistics Report

Refresh

Help

Configuring External Objects

Email

Workflow Administration Console 11

File Action View Tools Help

Workflow Administration Console 11

localhost

- Workflows
- Starting Rules
- Monitoring
 - Subscribers
 - Wait Conditions
 - Waiting Parent Instances
 - Sessions
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 - All error logs
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 - Web Services
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 - Server Timers
- Holidays and Weekends
- ADO.NET Reporting
- Workflow Web Service
- Task Error Handlers
- Redirects
- Custom Activities
- Activity Migration Map
- Advanced Server Options
- Security
 - Permissions and Rights
 - File Browser Options
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 - Tasks
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 - Loaded Assemblies
 - Failed Instance Completions

Name	Host	Default
10.0.5.33	10.0.5.33	No
Google SMTP	smtp-relay.gmail.com	No

Email Server Manager

Specify the SMTP servers through which the Workflow Server will send emails.

Enabled	Name	SMTP Server	Is Default
✓	10.0.5.33	10.0.5.33	
✓	Google SMTP	smtp-relay.gmail.com	

Email Server Properties

Email Server Name: 10.0.5.33

SMTP Settings

Server: 10.0.5.33 Port: 25

☐ Use SSL

☒ Use default authentication

User name:

Password:

Email Settings

Sender address: workflow@docunav.com

Default subject: Workflow Notification

Validation

Test the email settings by providing an email address:

Test

☒ Enabled

Help OK Cancel

Email

Manage email servers...

Refresh

Help

Configuring External Objects

Data Sources

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localhost

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Persisted Instances

Name	Description
Localhost	
LF_CustomTables	
LF_CustomTables (2)	

Workflow Data Source Administrator

Workflow Server data source:

Name	Description
Localhost	
LF_CustomTables	
LF_CustomTables (2)	

Add

Remove

Configure

Configure Data Source Wizard

Welcome to the Data Source Configuration Wizard

This wizard is designed to guide you through selecting or modifying a data source, which will be used to extract or verify information in an external database.

Name: LF_CustomTables

Description:

Choose wizard type:

☒ Direct connections

☐ Windows ODBC

☐ Expert (Connection strings)

To continue, click Next.

Help

< Back

Next >

Cancel

Actions

Data Sources

Manage Data Sources...

Refresh

Help

LF_CustomTables

View Linked Workflows...

Manage Data Sources...

Edit Data Source

Delete

Help

Configuring External Objects

Web Services

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Name	Service URL	User	Type
FORMS	http://ec2amaz-98qnekn/forms	MHORT	Laserfiche Forms

Edit Web Service

Name: FORMS

Type: Laserfiche Forms

URL: http://ec2amaz-98qnekn/forms

Test URL

☐ Use default authentication

☒ Use the following credentials

User name: MHORT

Password:

☒ Run activities that use this web service as a task

☒ Accept invalid certificates

Help

OK

Cancel

Actions

Web Services

[Add Web Service...](#)

[Refresh](#)

[Help](#)

FORMS

[Add Web Service...](#)

[Edit...](#)

[View Linked Workflows...](#)

[Delete](#)

[Help](#)

Configuring Workflow Server Settings

Server Timers

Workflow Administration Console 11

File Action View Tools Help

Workflow Administration Console 11

localhost

- Workflows
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 - Certificates
 - Web Services
 - Lasercache Distributed Computing Cluster
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Name	Enabled	Last Run	Last ...	Last Run Result
Business Process Notification Timer	No	N/A	N/A	N/A
Database Maintenance Timer	Yes	08/25/2022 2:00 AM	0 ms	08/25/2022 2:00:01 AM: Running tracking archive cleanup (cleanup_tracking_log_chunk stored procedure)
Terminated Workflow Notification Timer	Yes	08/25/2022 6:00 AM	0 ms	Success

Database Maintenance Timer

Configure the properties and settings for when and how Workflow maintains its database

Schedules

Settings

Starts	Repeats	Days
2:00 AM	Every 1 hour(s) until 2:15 AM	Sun, Mon, Tue, Wed, Thu, Fri, Sat

Add...

Edit...

Remove

☐ Exclude holidays and weekends from all schedules

☒ Enabled

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OK

Cancel

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Name	Value
Reporting instance lifetime	Older then 365 days.
Search instance lifetime	Older then 30 days.
Delete log files	Never
Compress log files	Yes

Advanced Server Options

Configure options that control how the Workflow Server operates.

Maintenance

WorkflowLog FilesTasksMonitored RepositoriesGeneralStarting WorkflowsTask ThreadsActivity Performance

Perform the following database maintenance tasks

- ☒ Remove reporting data for completed workflows
 - Lifetime: 365 days
 - Timeout: 300 seconds
- ☒ Remove instance data for completed workflows
 - Lifetime: 30 days
 - Timeout: 300 seconds
- ☒ Remove unreferenced items from workflow message cache
 - Timeout: 300 seconds

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ApplyOKCancel

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Name	Value
Reporting instance lifetime	Older then 365 days.
Search instance lifetime	Older then 30 days.
Delete log files	Never
Compress log files	Yes

Advanced Server Options

Configure options that control how the Workflow Server operates.

Maintenance Workflow Log Files Tasks Monitored Repositories General Starting Workflows Task Threads Activity Performance

Options for workflow: EMP-01-Filing

Track the following messages:

☒ Starting entries

☒ Activity messages

☒ All other entries

☒ Activity warnings

☒ Tokens

☒ Activity errors

☒ Conditions

☒ Custom data

Begin tracking workflow instances when:

☒ The workflow instance is created

☐ The workflow instance begins running

Performance options:

☒ Unload when idle

☐ Single instance mode

☐ Queue all activity tasks

Help

Apply OK Cancel

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Questions?

THANK YOU!

DocuNav Solutions

