AGILEPOINT FUNDAMENTALS TRAINING

This manual was developed to provide students with an opportunity to design, configure, deploy and test process based applications using the AgilePoint Portal with eForms.

eForms Track - Lab Manual

Lab Manual

Confidential © 2015, AgilePoint, Inc.

Introduction

This lab manual was developed to provide business and technical project team members the opportunity to rapidly define, design, deploy, and test custom applications, using the AgilePoint Portal with eForms in structured skills development exercises. The labs have been developed to represent common business process scenarios and context with a variety of different eForm configurations. The labs in each section are cumulative and build on the skills presented in the previous labs. These labs require access to the AgilePoint Portal, and introduce key capabilities of the Application Builder, Process Designer, Form Designer, Work Center, and Enterprise Manager.

System Requirements

In order to complete the exercises in this lab manual, a computer with the following minimum system requirements is required:

One of the following browsers is required:

- Internet Explorer 10 +
- Firefox
- Google Chrome
- Safari 6

In addition, the computer system must support a minimum screen resolution of 1024 X 768.

eForms Overview

AgilePoint eForms provide a very powerful forms option to create custom applications for the cloud or on premise that support modern devises and browsers. The Application Builder allows the designer to create a unique form for each task within a custom application. The custom eForms applications are designed, validated, published and versioned from the Application Builder.

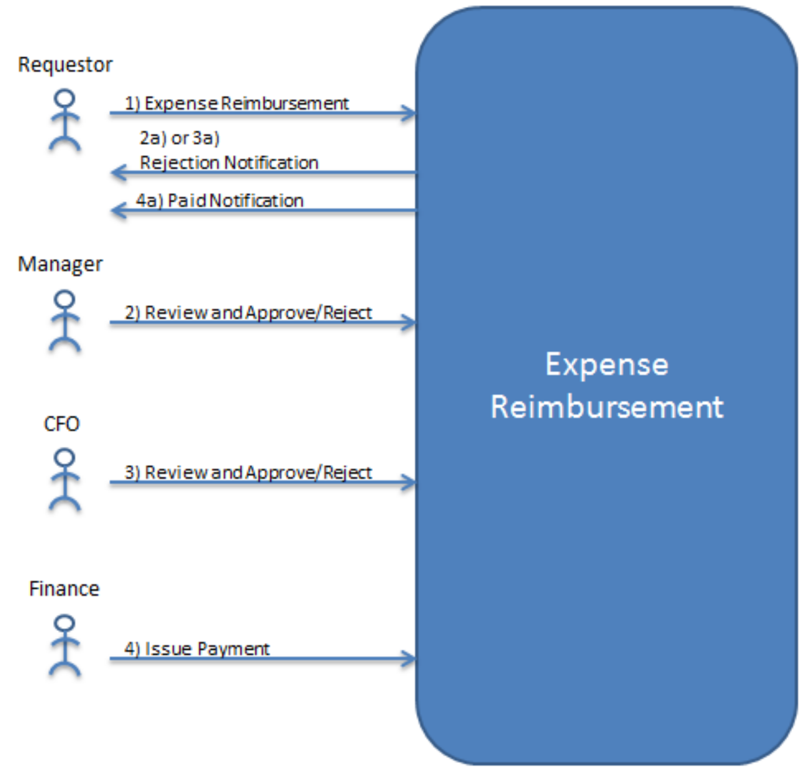
 © 2015, AgilePoint, Inc.

Lab 1

This lab provides a very basic introduction to rapidly define, design, deploy, and test a custom application using the AgilePoint Portal with eForms. The custom application is based on the **Expense Reimbursement** process described below.

Business Context

The following context diagram illustrates the high level requirements for the first iterative delivery of the **Expense Reimbursement** application.



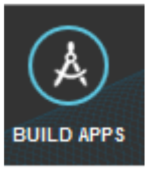
1. Requestor submits the Expense Reimbursement form
2. Manager Reviews the request and Approves or Rejects it
    a. If Rejected, a Rejection Notification is sent to the Requestor
3. If amount is greater the $5000.00, CFO Reviews the request and Approves or Rejects it
    a. If Rejected, a Rejection Notification is sent to the Requestor

Confidential © 2015, AgilePoint, Inc.

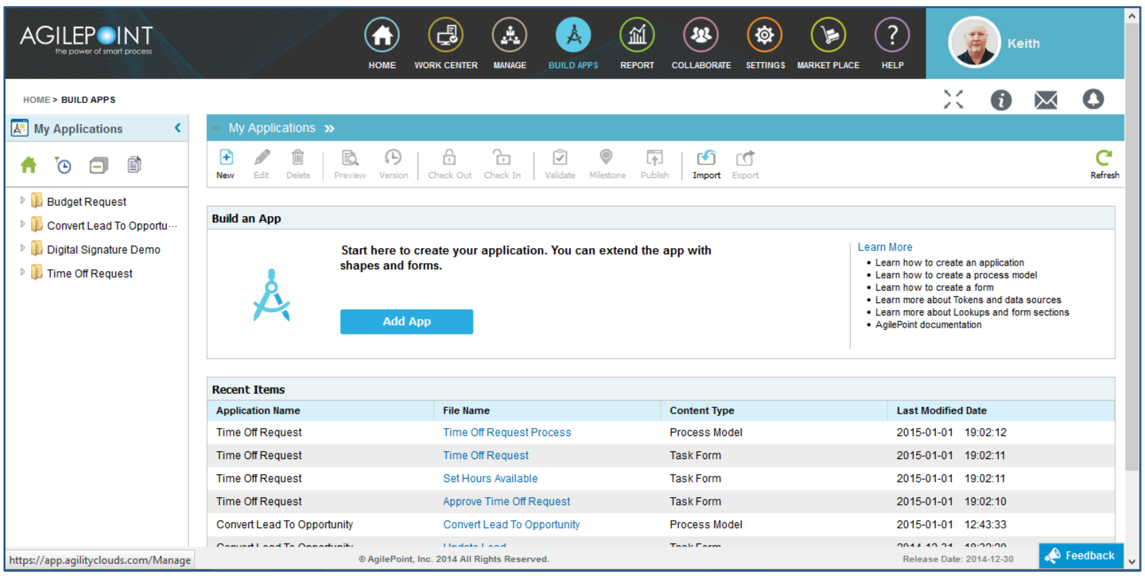
4. Finance Issues a Payment
    a. A Paid Notification is sent to the Requestor

Create a New Application

To create a new application, complete the following steps:

1. Login to the **AgilePoint Portal**
2. Click the 

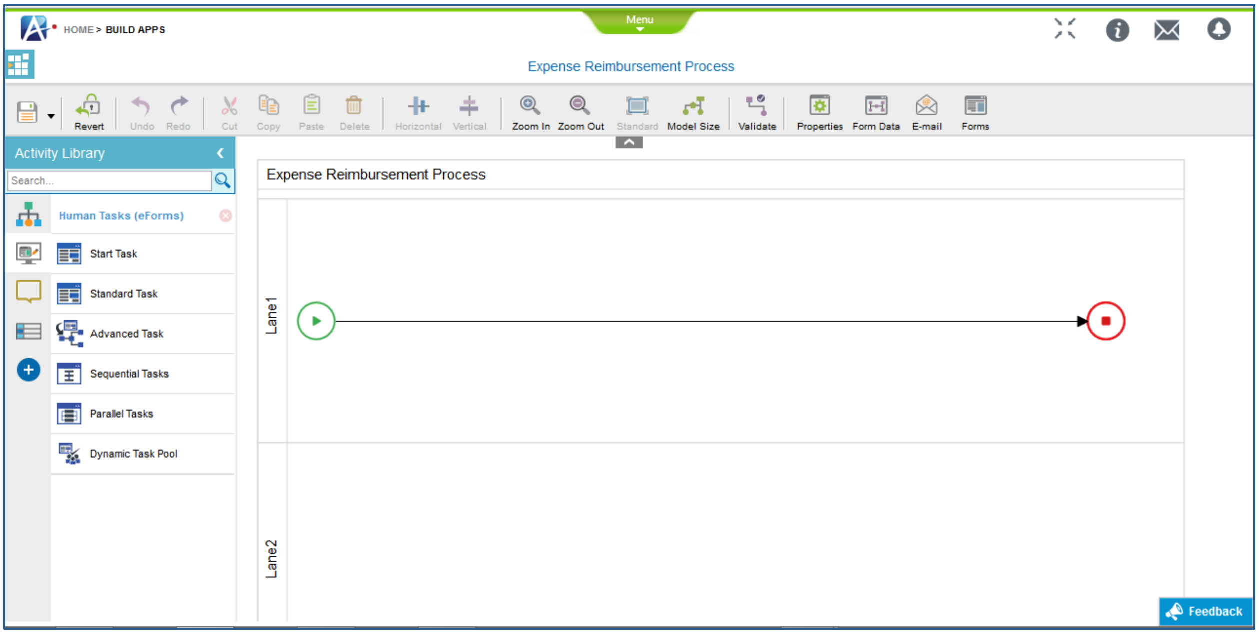
icon on the **Portal Menu** to open the Application Builder will open as shown below.



3. Click on  icon to hide the **Portal Menu**
4. Click the **Add App** button in **Build an App**
5. Type **Expense Reimbursement** for **Application Name**
6. Click the **Next** button
7. Type **Expense Reimbursement Process** for **Process Model Name**
8. Select **4** for **Number of Swimlanes**
9. Click the **Next** button
10. Click the **Finish** button

Confidential © 2015, AgilePoint, Inc.

The new **Expense Reimbursement** application has been completed as shown below, and you are ready to design and configure the application functionality.

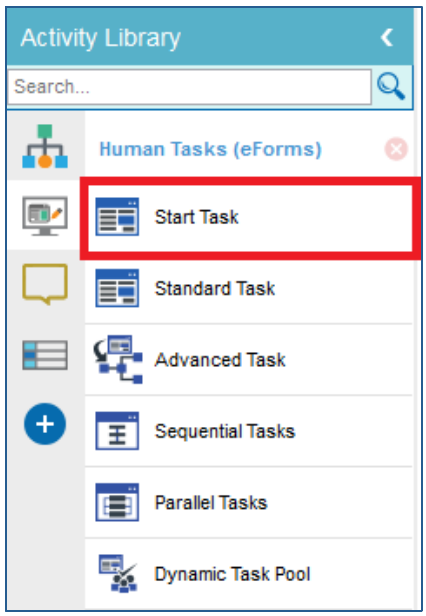


Confidential © 2015, AgilePoint, Inc.

Design and Configure the Application

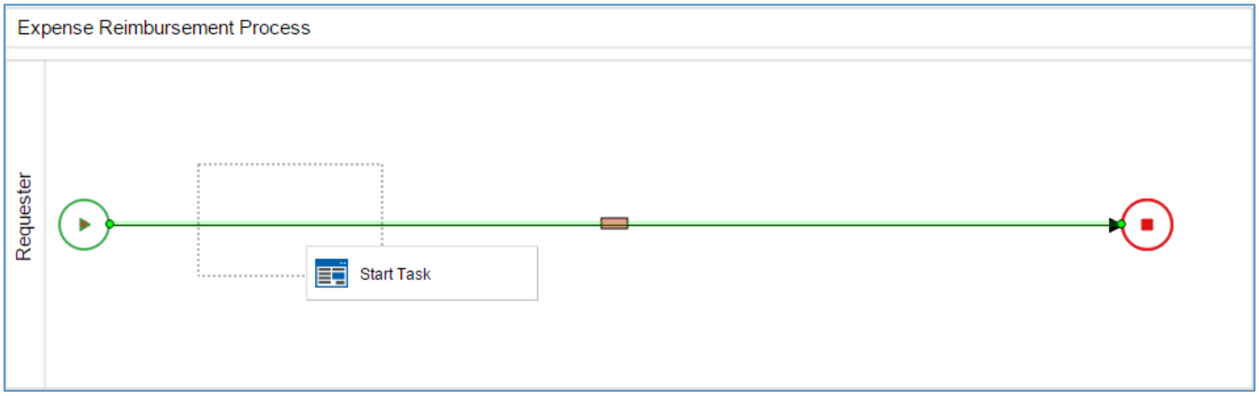
Each application uses a process to define the activities, forms, rules and logic which govern the applications execution. Complete the following steps to define and configure the Expense Reimbursement Application.

1. Double click the label **Lane1** and type **Requester**
2. Double click the label **Lane2** and type **Manager**
3. Double click the label **Lane3** and type **CFO**
4. Double click the label **Lane4** and type **Finance**
5. Click  **Save** on the **Process Designer Menu** and close the success confirmation
6. Drag a **Start Task** from **Human Tasks (eForms)** in the **Activity Library**, as shown below to the right of **Start** in the **Process Model**.

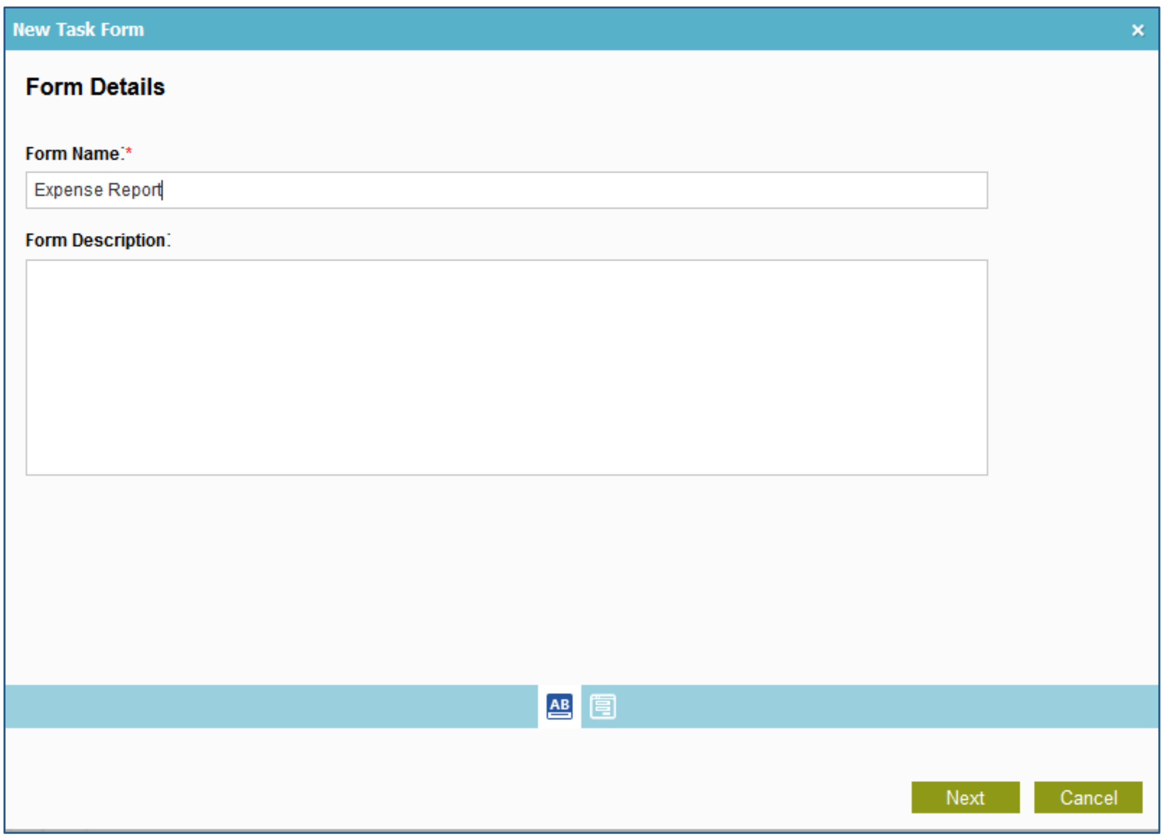


Note: Be sure to drop the **Start Activity** on the **Connector** (line) while the connector is highlighted as shown below

Confidential © 2015, AgilePoint, Inc.

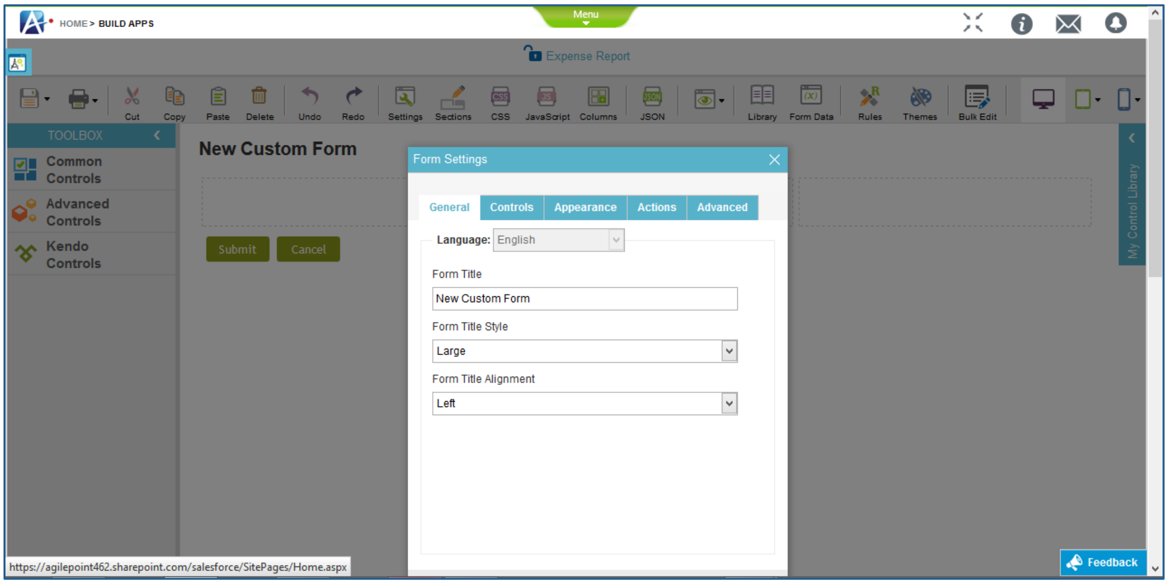


7. Click **Add new form** in **Start Task Configuration**
8. Type **Expense Report** for **Form Name** in the **New Task Form**, as shown below and click the **Next** button



© 2015, AgilePoint, Inc.

9. Click the **Finish** button
   Note: The **Form Designer** will open as shown below



10. Close **Form Settings** by selecting **X**
11. Click the  icon in the **Form Designer Menu**

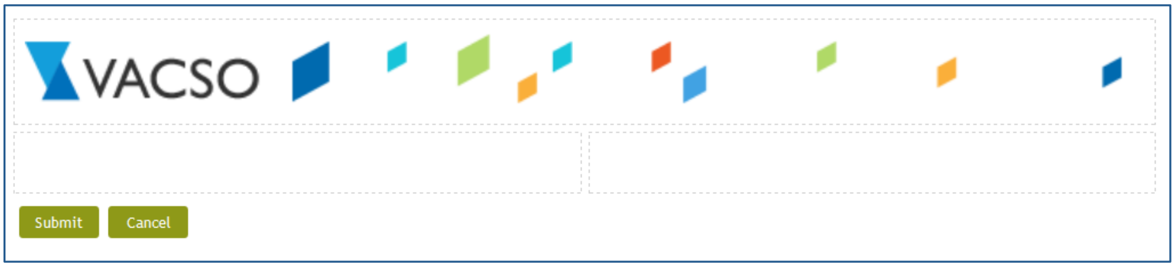
12. Click **2** in the **Column Layout** and click **OK**
13. Click **Common Controls** in the **Toolbox**
14. Use the **Toolbox** scroll bar to scroll down until the **Image** control is visible
15. Drag the **Image** control into the first **column** on the left side of the form
16. Type **Header Image** into the **Label** and close **Field Settings**
17. Mouse over or click the **Header Image** and click the **Image Picker**, as shown below

18. Click the **Browse** button in the lower left corner of the **Image Picker**
19. Select an image file from your computer and click the **Open** button
20. Click the **Upload** button and click **OK**

Confidential © 2015, AgilePoint, Inc.

© 2015, AgilePoint, Inc.

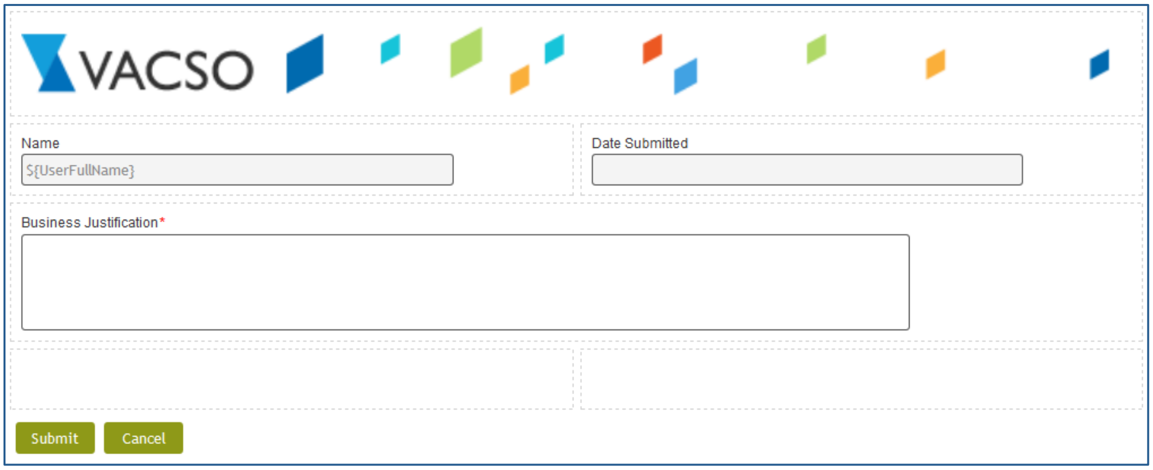
21. Place the cursor or mouse pointer on the right edge of the **Header Image** and drag to the right so that the **Header Image** spans both columns, as shown below



22. Use the **Toolbox** scroll bar to scroll up until the **Text Box** control is visible
23. Drag a **Text Box** control into the left column under the **Header Image**
24. Type **Name** in the **Label**
25. Click **Process Data** on the right side of **Field Settings**, then click **System Data**
26. Drag **UserFullName** into the **Default Value**
27. Close **Process Data**
28. Click the **Behavior** tab and check **Read-Only**
29. Close **Field Settings**
30. Use the **Toolbox** scroll bar to scroll down until the **Date** control is visible
31. Drag a **Date** control into the right column under the **Header Image**
32. Type **Date Submitted** into the **Label**
33. Select **Current Date** for the **Default Value**
34. Click the **Behavior** tab and uncheck **Enabled**
35. Close **Field Settings**
36. Use the **Toolbox** scroll bar to scroll up until the **Text Area** control is visible
37. Drag a **Text Area** control into the left column under **Name**
38. Type **Business Justification** into the **Label**
39. Click the **Configure** tab and check **Mandatory**
40. Close **Field Settings**

Confidential © 2015, AgilePoint, Inc.

41. Place the cursor or mouse pointer on the right edge of the **Business Justification** and drag to the right so that the **Business Justification** spans both columns, as shown below

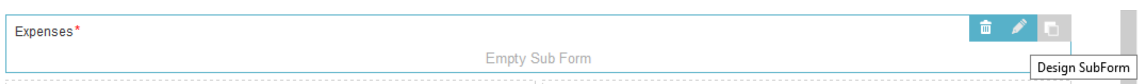


42. Use the **Toolbox** scroll bar to scroll down until the **Subform** control is visible
43. Drag a **Subform** control into the left column under **Business Justification**
44. Type **Expenses** into the **Label**
45. Click the **Configure** tab
46. Check **Mandatory**
47. Check **Show Label**
48. Check **Repeatable**
49. Close **Field Settings**

Confidential © 2015, AgilePoint, Inc.

50. Place the cursor or mouse pointer on the right edge of the **Expenses** and drag to the right so that the **Expenses** spans both columns, as shown below

51. Click on or hover over **Expenses** and click **Design Subform**, as shown below



52. Click the **+** icon to add two more columns for a total of four (4)
53. Drag a **Date** control into the first column on the left
54. Type **Expense Date** into the **Label**
55. Click the **Configure** tab and check **Mandatory**
56. Close **Field Settings**
57. Drag a **Text Box** into the column to the right of **Expense Date**
58. Type **Expense Description** into the **Label**
59. Click the **Configure** tab and check **Mandatory**
60. Close **Field Settings**
61. Drag a **Drop-Down List** control into the column to the right of **Expense Description**
62. Type **Expense Category** into **Label**
63. Click the **Configure** tab

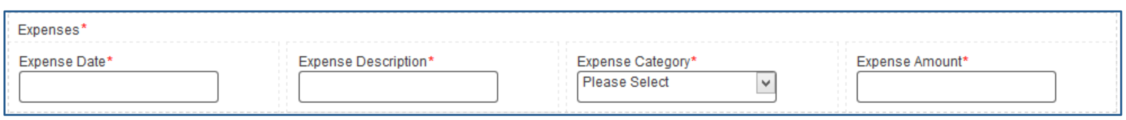
 © 2015, AgilePoint, Inc.

64. Check **Mandatory**
65. Add the following list of expense types to the **Name** and **Value** for the **Inline List**, click the **Add Option** button and scroll as needed to add additional options to the list

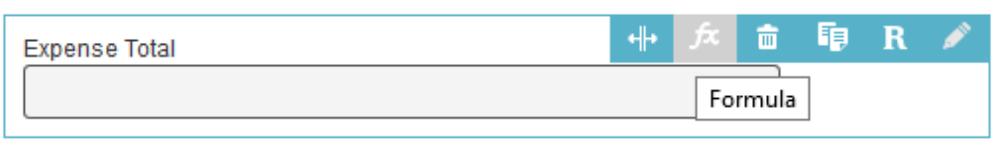
Expense Categories
Please Select
Accommodation
Bank/Finance Charges
Cell Phone
Insurance
Meals
Miscellaneous
Postage
Travel

66. Close **Field Settings** once all of the options are added to the list
67. Drag a **Number Box** control into the last column to the right of **Expense Category**
68. Type **Expense Amount** into the **Label**
69. Click the **Configure** tab and check **Mandatory**
70. Close the **Field Settings**
71. Click the **Close (X)** icon to return to the parent form

Note: The completed **Subform** is shown below



72. Click **Edit Properties** on **Expenses**
73. Click the **Advanced** tab
74. Click the **Sub Total** button, check **Expense Amount**, and click the **OK** button
75. Close the **Field Settings**
76. Drag a **Formula** control from **Advanced Controls** into the left column under **Expenses**
77. Type **Expense Total** into the **Label** and close **Field Settings**
78. Click on or hover over **Expense Total** and click the **Formula** button, as shown below

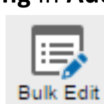


79. Select **sum** for **Functions** in the lower right corner and click the **Insert** button
80. Highlight **${numberArray}** with your mouse pointer and select **Expense Amount** from **Fields/Tokens**

Confidential © 2015, AgilePoint, Inc.

Note: The resulting formula should be **sum(${Expenses/ExpenseAmount})**

81. Click **Validate** and close the **Formula is valid** message
82. Click **OK**
83. Click **Save** on the **Form Designer Menu** and close the success confirmation
84. Click the  **Application Builder** icon in the upper left corner to return to the **Process Designer**
85. Click the **Next** button in the **Start Task** wizard
86. Type **Submit Expense Report** in the **Display Name** and click the **Next** button
87. Click the **Finish** button
88. Click **Save** on the **Process Designer Menu** and close the success confirmation
89. Drag a **Standard Task** from **Human Tasks (eForms)** in the **Activity Library to the connector** on the right of **Submit Expense Report**
90. Click **Add new form** in **Standard Task Configuration**
91. Type **Manager Approve Expenses** for **Form Name** in the **New Task Form**
92. Click **Next**
93. Click **Existing Form**
94. Click **Next**
95. Click **Expense Report**
96. Click **Finish**
97. Click the 

Sections icon on the **Form Designer Menu**
98. Replace **Section 1** with **Expense Report**
99. Type **Processing** in **Add New Section,** click the **Add** button and then click **OK**
100. Click the 

Bulk Edit icon on the **Form Designer Menu**
101. Uncheck all of the **Mandatory** properties
102. Uncheck all of the **Enabled** properties for all controls without a **Read-Only** property
103. Check all of the **Read-Only** properties
104. Close **Edit Fields**
105. Click the **Processing** tab
106. Click **Common Controls** in the **Toolbox**
107. Drag a **Heading** control into the first column on the left
108. Type **Manager** in the **Label**
109. Click the **Configure** tab and select **Large** for the **Heading Style**
110. Close **Field Settings**
111. Drag a **Drop-Down List** control into the first column on the left under the **Manager**
112. Type **Manager Decision** for the **Label**
113. Click the **Configure** tab

Confidential © 2015, AgilePoint, Inc.

114. Check **Mandatory**
115. Add the following list of expense types to the Name and Value for the Inline List, click the Add Option button and scroll as needed to add additional options to the list

Manager Decision
Please Select
Approve
Reject
Rework

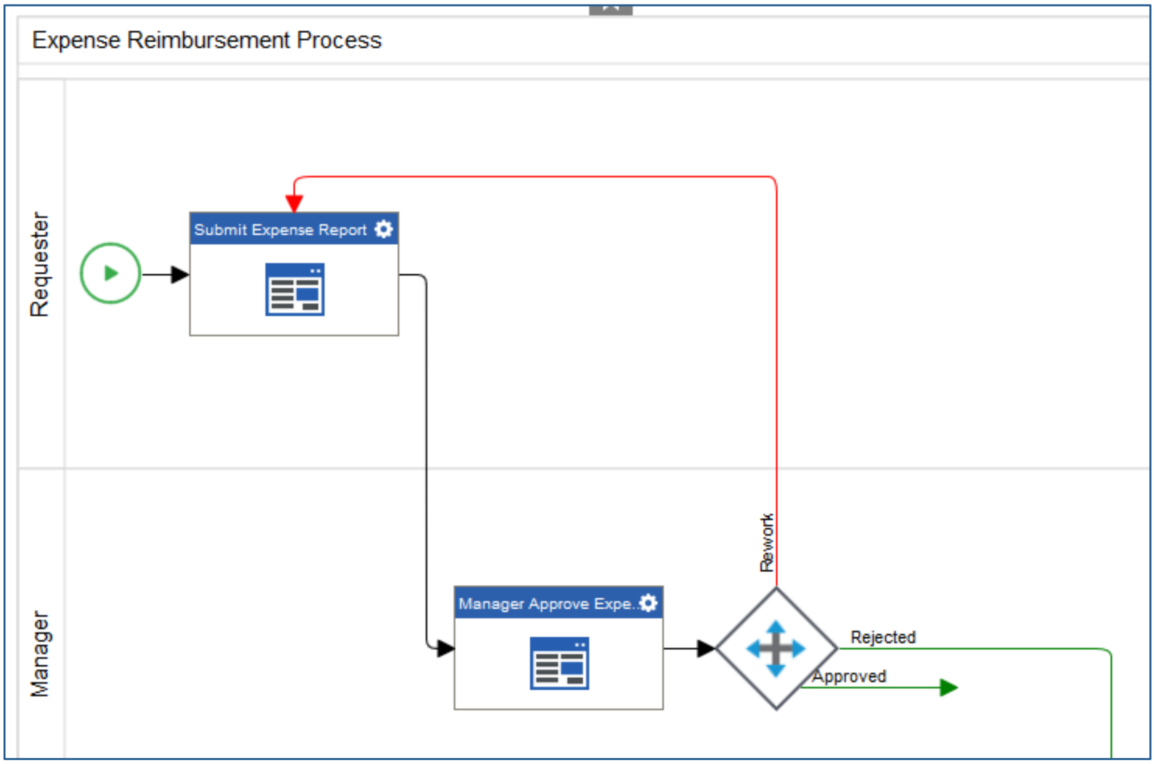
116. Close **Field Settings** once all of the options are added to the list
117. Drag a **Text Area** control into the first column on the left under the **Manager Decision**
118. Type **Manager Comments** for the **Label**
119. Close **Field Settings**
120. Place the cursor or mouse pointer on the right edge of the **Manager Comments** and drag to the right so that the **Manager Comments** spans both columns
121. Click **Manager Decision**
122. Click the **Rules** icon in the right hand corner of the control
123. Drag **Manager Decision** into **When**
124. Configure the rule to read **Manager Decision is not equal to Approve**
125. Drag a **Set as Mandatory Action** into **Then**
126. Select **Manager Comments**
127. Click **OK**
128. Click **Save** on the **Form Designer Menu** and close the success confirmation
129. Click the **Application Builder** icon to return to the **Process Designer**
130. Click the **Next** button in the **Standard Task** wizard
131. Type **Manager Approve Expenses** for the **Display Name**
132. Click the **Next** button
133. Click **Process Data**, click **System Data** and drag **ProcessInitiator** into **Details**
134. Click the  **Manager** icon for the **ProcessInitiator**
135. Click the **Finish** button
136. Click **Save** on the **Process Designer Menu** and close the success confirmation
137. Use the down arrow or drag **Manager Approve Expenses** to the middle of the **Manager** swimlane
138. Click **Stop** and use the down arrow or drag it to the middle of the **Finance** swimlane
139. Click **Save** on the **Process Designer Menu** and close the success confirmation
140. Click the  **Common** icon in the **Activity Library**
141. Drag a **Condition** activity to the connector on the right of **Manager Approve Expenses**

Confidential © 2015, AgilePoint, Inc.

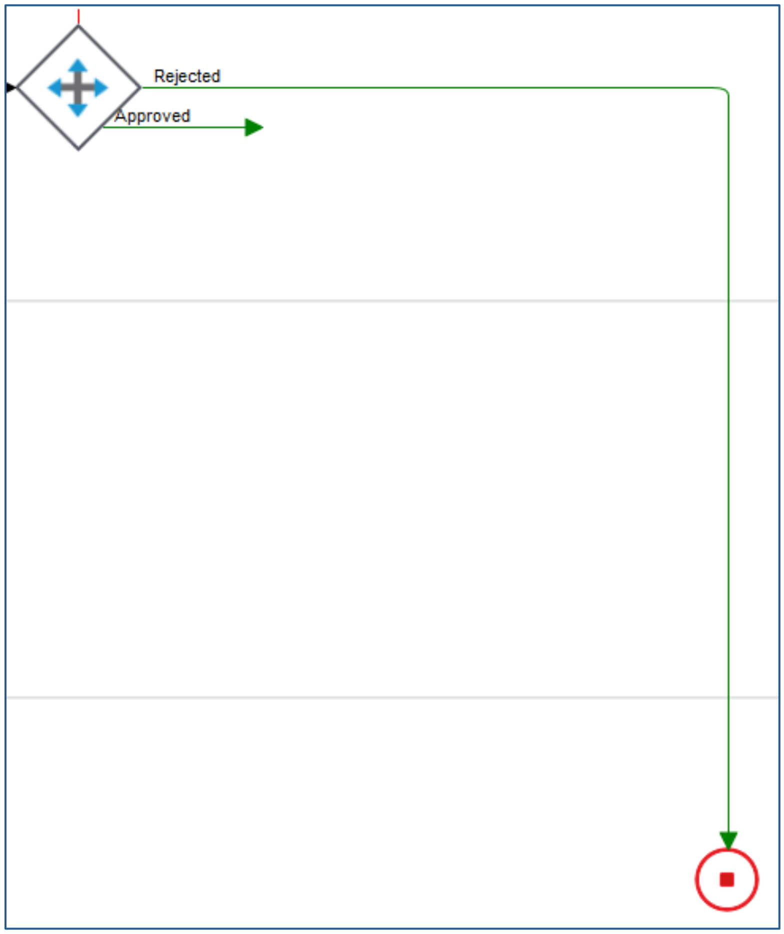
142. Type **Evaluate Manager Decision** for **Display Name**
143. Select **Else connector shows on: Top**
144. Click **Add New Rule**
145. Replace **Rule Name 1** with **Rejected**
146. Replace **Rule Name 2** with **Approved**
147. Replace **Else** with **Rework**
148. Click **Edit** on **Rejected**
149. Click **Process Data**, then click **Form Data**
150. Drag **ManagerDecision** in the box below **If**
151. Select **String**, then **==**
152. Type **Reject** in the box on the right to complete the expression
153. Click the **Back** arrow under **Condition Builder**
154. Click **Edit** on **Approved**
155. Click **Process Data**, then click **Form Data**
156. Drag **ManagerDecision** in the box below **If**
157. Select **String**, then **==**
158. Type **Approve** in the box on the right to complete the expression
159. Click the **Back** arrow under **Condition Builder**
160. Click **Finish**
161. Drag the **Rework** connector (line) to **Submit Expense Report**

Confidential © 2015, AgilePoint, Inc.

162. Place the mouse over the horizontal portion of the **Rework** connector and drag it up until the connector moves to the top of **Submit Expense Report**, as shown below



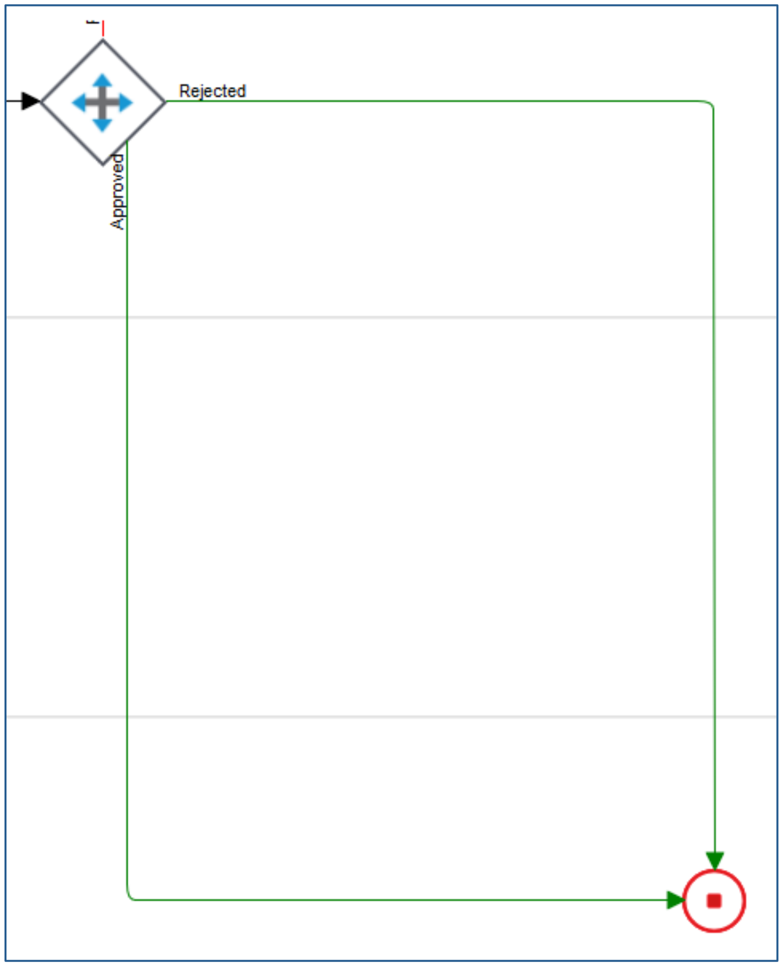
163. Place the mouse over the vertical portion of the **Rejected** connector and drag it to the right until the connector moves to the top of **Stop**, as shown below



164. Drag the **Approved** connector (line) to **Stop**

© 2015, AgilePoint, Inc.

165. Place the mouse over the vertical portion of the **Approved** connector and drag it to the left, as shown below



166. Click **Save** on the **Process Designer Menu** and close the success confirmation
167. Drag a **Condition** activity onto the **Approved** connector in the **CFO** swimlane
168. Type **Evaluate Expense Total** for **Display Name**
169. Replace **Rule Name 1** with **> 5,000**
170. Click **Rule 1 Edit**
171. Click **Process Data**, then click **Form Data**
172. Drag **ExpenseTotal** into the box on the left under **If**
173. Select **Number**, then **>**
174. Type **5000** in the box on the right to complete the expression
175. Click the **Finish** button

© 2015, AgilePoint, Inc.

176. Drag the **Else** connector (line) to **Stop** as shown below

177. Click the **Else** connector and click **Properties** on the **Process Designer Menu**
178. Type **#008000** into the **Background Color** and close **Properties**
179. Click **Save** on the **Process Designer Menu** and close the success confirmation
180. Click the  **Human Tasks (eForms)** icon in the **Activity Library**
181. Drag a **Standard Task** onto the connector to the right of **Evaluate Expense Total** in the **CFO** swimlane
182. Click **Add New Form** and click **Next**
183. Type **CFO Approve Expenses** for **Form Name**
184. Click the **Next** button
185. Click **Existing Form**
186. Click the **Next** button
187. Click **Manager Approve Expenses**
188. Click the **Finish** button
189. Click the **Processing** section
190. Click **Manager Decision**
191. Click the **Edit Properties** icon
192. Click the **Configure** tab and uncheck **Mandatory**
193. Click the **Behavior** tab and uncheck **Enabled**
194. Close **Field Settings**
195. Click **Manager Decision**
196. Click the **Rule** icon
197. Remove all of the rules from the **Rule Builder** and click **OK**
198. Click **Manager Comment**
199. Click the **Edit Properties** icon
200. Click the **Behavior** tab and check **Read-Only**

201. Close **Field Settings**
202. Click **Common Controls**
203. Drag a **Horizontal Line** control in the column on the left under **Manager Comments**
204. Close **Field Settings**
205. Place the cursor or mouse pointer on the right edge of the **Horizontal Line 1** and drag to the right so that the **Horizontal Line 1** spans both columns
206. Drag a **Heading** control into the first column on the left under the **Horizontal Line 1**
207. Type **CFO** in the **Label**
208. Click the **Configure** tab and select **Large** for the **Heading Style**
209. Close **Field Settings**
210. Drag a **Drop-Down List** control into the first column on the left under the **CFO**
211. Type **CFO Decision** for the **Label**
212. Click the **Configure** tab
213. Add the following list of expense types to the Name and Value for the Inline List, click the Add Option button and scroll as needed to add additional options to the list

CFO Decision
Please Select
Approve
Reject
Rework

214. Close **Field Settings** once all of the options are added to the list
215. Drag a **Text Area** control into the first column on the left under the **CFO Decision**
216. Type **CFO Comments** for the **Label**
217. Close **Field Settings**
218. Place the cursor or mouse pointer on the right edge of the **CFO Comments** and drag to the right so that the **CFO Comments** spans both columns
219. Click **CFO Decision**
220. Click the **Rules** icon in the right hand corner of the control
221. Drag **CFO Decision** into **When**
222. Configure the rule to read **CFO Decision is not equal to Approve**
223. Drag a **Set as Mandatory Action** into **Then**
224. Select **CFO Comments**
225. Click **OK**
226. Click **Save** on the **Form Designer Menu** and close the success confirmation
227. Click the **Application Builder** icon to return to the **Process Designer**
228. Click the **Next** button in the **Standard Task** wizard
229. Type **CFO Approve Expenses** for the **Display Name**
230. Click the **Next** button
231. Click **Roles** and drag **Users** into **Details**
232. Click the **Finish** button

 © 2015, AgilePoint, Inc.

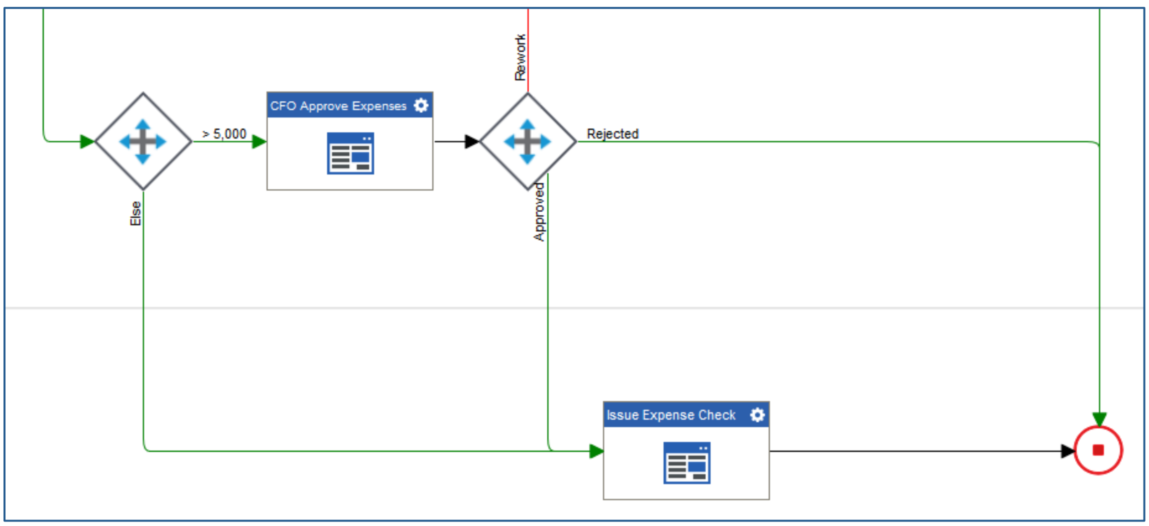
233. Click **Save** on the **Process Designer Menu** and close the success confirmation
234. Move the cursor to the top to see the Menu bar and click the **Manage** icon on the **Portal Menu**
235. Click **Access Control** in the left navigation, then click **Roles**
236. Click the **Add Role** icon
237. Type **CFO** for **Role Name**
238. Click the **Next** button twice
239. Click the **Add Member** icon
240. Select **User**, type your user account and click the **Search** iconCheck your user account and click **OK**
     Tip: Use **%** as a wildcard search character, ex: %admin%
241. Click the **Finish** button
242. Click the **Build Apps** icon on the **Portal Menu**
243. Click **Expense Reimbursement Process** in the **Recent Items** list
244. Click the **Activity Menu** icon on **CFO Approve Expenses**, then click **Configure Activity**
245. Click the Participants icon
246. Remove **Users** from **Details** by clicking the **X**
247. Select **Roles** and drag **CFO** into **Details**
248. Click the **Finish** button
249. Click **Save** on the **Process Designer Menu** and close the success confirmation
250. Click the right border of the **Swimlane** and drag it to the right to create additional space to add more activities
251. Click **Stop** and use the right arrow key or drag to the right
252. Click **Save** on the **Process Designer Menu** and close the success confirmation
253. Drag a **Condition** activity to the connector on the right of **CFO Approve Expenses**
254. Type **Evaluate CFO Decision** for **Display Name**
255. Select **Else connector shows on: Top**
256. Click **Add New Rule**
257. Replace **Rule Name 1** with **Rejected**
258. Replace **Rule Name 2** with **Approved**
259. Replace **Else** with **Rework**
260. Click **Edit** on **Rule 1**
261. Click **Process Data**, then click **Form Data**
262. Drag **CFODecision** in the box below **If**
263. Select **String**, then **==**
264. Type **Reject** in the box on the right to complete the expression
265. Click the **Back** arrow under **Condition Builder**

 © 2015, AgilePoint, Inc.

266. Click **Edit** on **Rule 2**
267. Click **Process Data**, then click **Form Data**
268. Drag **CFODecision** in the box below **If**
269. Select **String**, then **==**
270. Type **Approve** in the box on the right to complete the expression
271. Click the **Back** arrow under **Condition Builder**
272. Click **Finish**
273. Drag the **Rework** connector (line) to **Submit Expense Report**
274. Place the mouse over the horizontal portion of the **Rework** connector and drag it up until the connector moves to the top of **Submit Expense Report**
275. Drag a **Standard Task** into the **Finance** swimlane to the right of **Evaluate CFO Decision**
276. Click **Add New Form**
277. Type **Issue Expense Check** for **Form Name**
278. Click the **Next** button
279. Click **Existing Form**
280. Click the **Next** button
281. Click **CFO Approve Expenses**
282. Click the **Finish** button
283. Click the **Processing** button
284. Click **CFO Decision**
285. Click the **Edit Properties** icon
286. Click the **Configure** tab and uncheck **Mandatory**
287. Click the **Behavior** tab and uncheck **Enabled**
288. Close **Field Settings**
289. Click **CFO Decision**
290. Click the **Rule** icon
291. Remove all of the rules from the **Rule Builder** and click **OK**
292. Click **CFO Comment**
293. Click the **Edit Properties** icon
294. Click the **Behavior** tab and check **Read-Only**
295. Close **Field Settings**
296. Click **Common Controls**
297. Drag a **Horizontal Line** control in the column on the left under **CFO Comments**
298. Close **Field Settings**
299. Place the cursor or mouse pointer on the right edge of the **Horizontal Line 2** and drag to the right so that the **Horizontal Line 2** spans both columns
300. Drag a **Heading** control into the first column on the left under the **Horizontal Line 2**
301. Type **Finance** in the **Label**
302. Click the **Configure** tab and select **Large** for the **Heading Style**
303. Close **Field Settings**

 © 2015, AgilePoint, Inc.

304. Drag a **Text Box** control in the left column under **Finance**
305. Type **Check Number** for **Label**
306. Click the **Configure** tab and check **Mandatory**
307. Close **Field Settings**
308. Click **Save** on the **Form Designer Menu** and close the success confirmation
309. Click the **Application Builder** icon to return to the **Process Designer**
310. Click the **Next** button in the **Standard Task** wizard
311. Type **Issue Expense Check** for the **Display Name**
312. Click the **Next** button
313. Click **Roles** and drag **Users** into **Details**
314. Click the **Finish** button
315. Click **Save** on the **Process Designer Menu** and close the success confirmation
316. Make sure that the **Else** connector and **Approved** connector are both connected to **Issue Expense Check**, as shown below



317. Click the **Manage** icon on the **Portal Menu**
318. Click **Access Control** in the left navigation, then click **Groups**
319. Click the  **Add Group** icon
320. Type **Accounts Payable** for **Group Name**
321. Type your account name for **Group Lead** and select your account name from the list
322. Click the **Next** button
323. Click the  **Add** icon
324. Type your user account into **User Name** and click the  **Search** icon
325. Check your user account and click **OK**
326. Click the **Finish** button
327. Click the **Build Apps** icon on the **Portal Menu**

Confidential © 2015, AgilePoint, Inc.

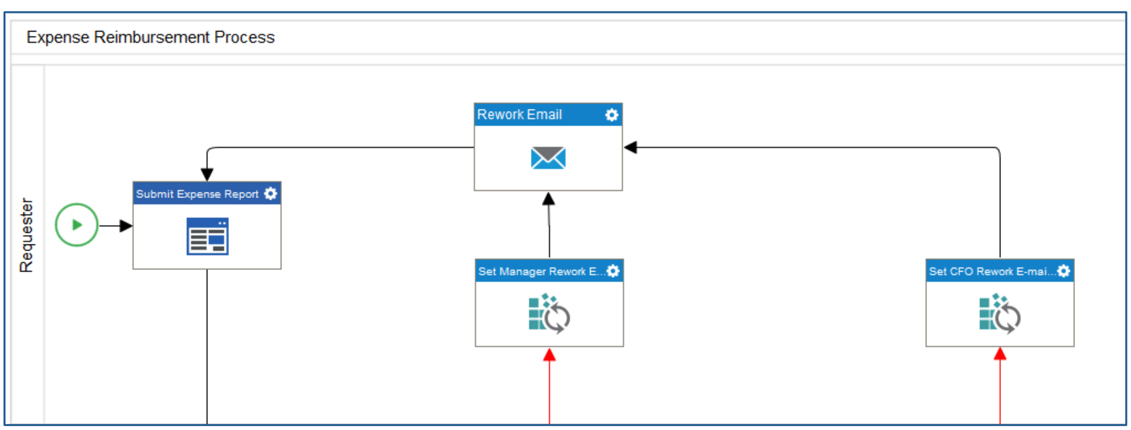
328. Click **Expense Reimbursement Process** in the **Recent Items** list
329. Click the **Activity Menu** icon on **Issue Expense Check**, then click **Configure Activity**
330. Click the Participants icon
331. Remove **Users** from **Details** by clicking the **X**
332. Select **Groups** and drag **Accounts Payable** into **Details**
333. Click the **Finish** button
334. Click **Save** on the **Process Designer Menu** and close the success confirmation
335. Click the **Form Data** icon in the **Process Designer Menu**
336. Click **Model Data**
    Note: In order to reduce the number of e-mail templates that need to be created and maintained, **Model Data** will be created and set after each decision
337. Click **Edit**
338. Right click on for **processFields**
339. Click **Element**
340. Type **DecisionBy** for **Element Name**
341. Right click **processFields**
342. Click **Element**
343. Type **DecisionComments** for **Element Name**
344. Click **OK**
345. Close **Data(Generic)**
346. Click **Save** on the **Process Designer Menu** and close the success confirmation
347. Drag an **Update Process Data** activity from **Common** stencil on the **Rework** connector for **Evaluate Manager Decision**
348. Type **Set Manager Rework E-mail Fields** for **Display Name**
349. Click the **Next** button
350. Click **Process Data**, then click **Model Data**
351. Drag **DecisionBy** into **Model Data Variable**
352. Type **"Manager"** for the **Expression**
353. Click the **Add New** icon
354. Drag **DecisionComments** into **Model Data Variable**
355. Click **Form Data**
356. Drag **ManagerComments** into the **Expression**
357. Click the **Finish** button
358. Drag an **Update Process Data** activity on the **Rework** connector for **Evaluate CFO Decision**
359. Type **Set CFO Rework E-mail Fields** for **Display Name**
360. Click the **Next** button
361. Click **Process Data**, then click **Model Data**

Confidential © 2015, AgilePoint, Inc.

362. Drag **DecisionBy** into **Model Data Variable**
363. Type **“CFO”** for the **Expression**
364. Click the **Add New** icon
365. Drag **DecisionComments** into **Model Data Variable**
366. Click **Form Data**
367. Drag **CFOComments** into the **Expression**
368. Click the **Finish** button

Confidential © 2015, AgilePoint, Inc.

369. Drag an **E-mail** activity on one of the connectors between the **Update Process Data** activity and **Submit Expense Report**
370. Type **Rework E-mail** for the **Display Name**
371. Click the **Next** button
372. Click the **Add New E-mail Template** icon
373. Type **Rework E-mail** for the **E-mail Template Name**
374. Click **System Data**
375. Drag **ProcessInitiator** into the **To** property
376. Click **Content**
377. Type **Your Expense Report Submitted** into the **Subject**
378. Click on **Form Data**
379. Drag **DateSubmitted** to the end of the **Subject**
380. Type **Requires Rework** at the end of the **Subject**
381. Type **Your** in the **Body**
382. Click **Model Data**
383. Drag **DecisionBy** to the end of the **Body**
384. Type **requested that you rework the Expense Report with the following comments:**
385. Press the enter key
386. Drag **DecisionComments** to the end of the **Body** and press the enter key
387. Type **Please update your Expense Report as requested and submit it for processing.**
388. Click the **OK** button
389. Click the **Finish** button
390. Make sure that both **Rework** connectors are connected to **Rework E-mail**, as shown below



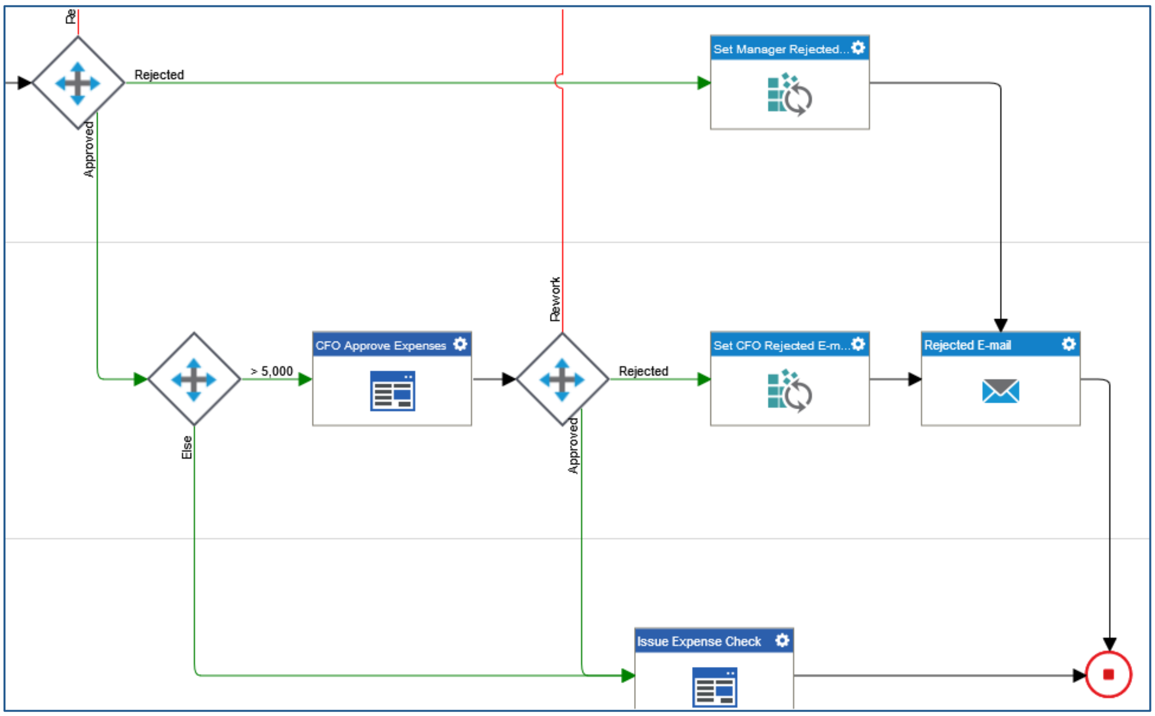
391. Click **Save** on the **Process Designer Menu** and close the success confirmation

© 2015, AgilePoint, Inc.

392. Drag an **Update Process Data** activity on the **Rejected** connector for **Evaluate Manager Decision**
393. Type **Set Manager Rejected E-mail Fields** for **Display Name**
394. Click the **Next** button
395. Click **Process Data**, then click **Model Data**
396. Drag **DecisionBy** into **Model Data Variable**
397. Type **“Manager”** for the **Expression**
398. Click the **Add New** icon
399. Drag **DecisionComments** into **Model Data Variable**
400. Click **Form Data**
401. Drag **ManagerComments** into the **Expression**
402. Click the **Finish** button
403. Drag an **Update Process Data** activity on the **Rejected** connector for **Evaluate CFO Decision**
404. Type **Set CFO Rejected E-mail Fields** for **Display Name**
405. Click the **Next** button
406. Click **Process Data**, then click **Model Data**
407. Drag **DecisionBy** into **Model Data Variable**
408. Type **“CFO”** for the **Expression**
409. Click the **Add New** icon
410. Drag **DecisionComments** into **Model Data Variable**
411. Click **Form Data**
412. Drag **CFOComments** into the **Expression**
413. Click the **Finish** button
414. Click **Save** on the **Process Designer Menu** and close the success confirmation
415. Drag an **Email** activity on the connector to the right of **Set CFO Rejected E-mail Fields**
416. Type **Rejected E-mail** for the **Display Name**
417. Click **Next**
418. Click the **Add New E-mail Template** icon
419. Type **Rejected E-mail** for the **E-mail Template Name**
420. Click **System Data**
421. Drag **ProcessInitiator** into the **To** property
422. Click **Content**
423. Type **Your Expense Report Submitted** into the **Subject**
424. Click on **Form Data**
425. Drag **DateSubmitted** to the end of the **Subject**
426. Type **Has Been Rejected** at the end of the **Subject**
427. Type **Your** in the **Body**
428. Click **Model Data**
429. Drag **DecisionBy** to the end of the **Body**

Confidential © 2015, AgilePoint, Inc.

430. Type **has rejected the Expense Report with the following comments:**
431. Press the enter key
432. Drag **DecisionComments** to the end of the **Body** and press the enter key
433. Click the **OK** button
434. Click the **Finish** button
435. Make sure that both **Rejected** connectors are connected to **Rejected E-mail**, as shown below

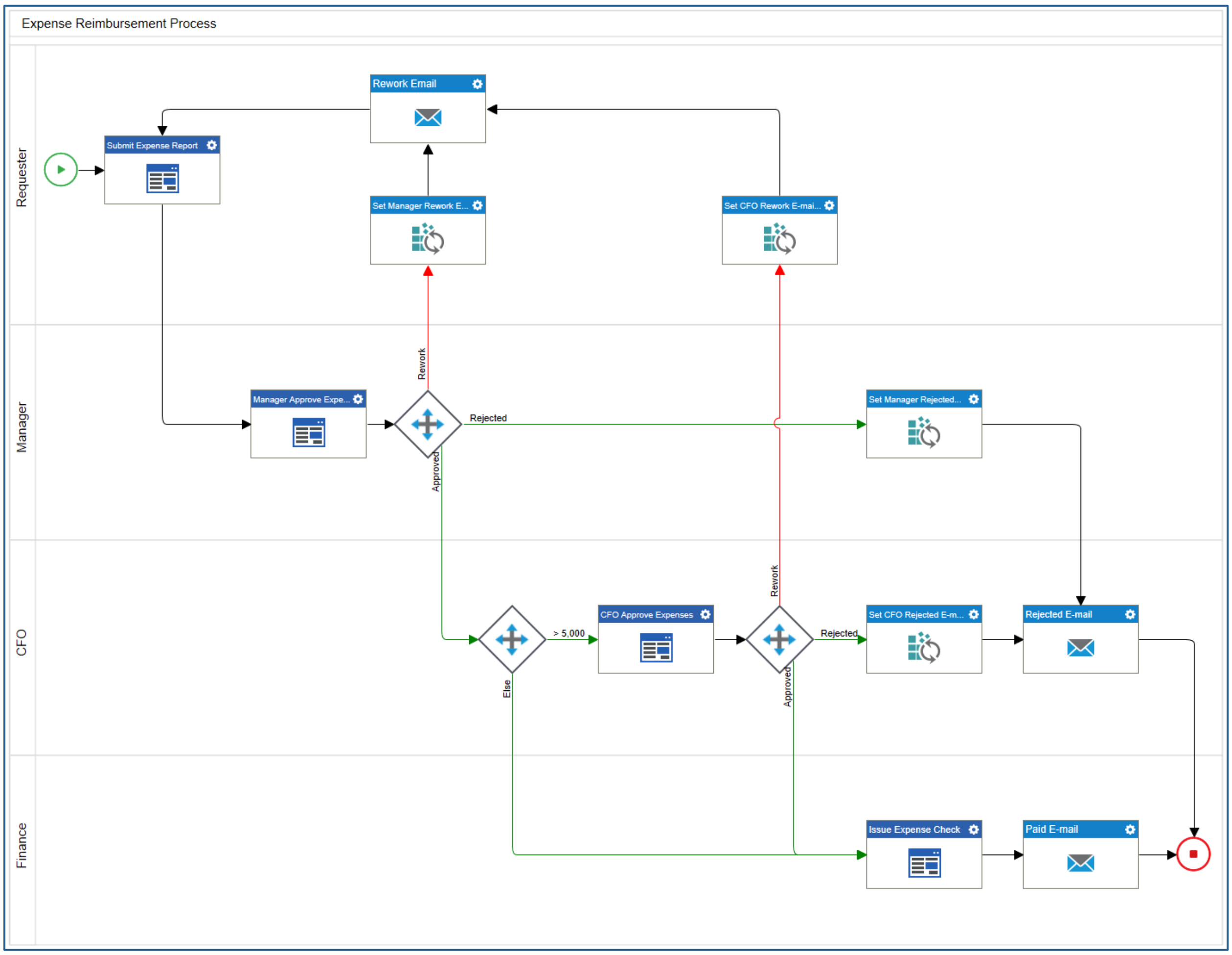


436. Click **Save** on the **Process Designer Menu** and close the success confirmation
437. Drag an **E-mail** activity on the connector to the right of **Issue Expense Check**
438. Type **Paid E-mail** for the **Display Name**
439. Click **Next**
440. Click the **Add New E-mail Template** icon
441. Type **Paid E-mail** for the **E-mail Template Name**
442. Click **System Data**
443. Drag **ProcessInitiator** into the **To** property
444. Click **Content**
445. Type **Your Expense Report Submitted** into the **Subject**
446. Click on **Form Data**
447. Drag **DateSubmitted** to the end of the **Subject**
448. Type **Has Been Paid** at the end of the **Subject**
449. Type **Expense Total** in the **Body**
450. Click **Form Data**

Confidential © 2015, AgilePoint, Inc.

451. Drag **ExpenseTotal** to the end of the **Body** and press the enter key
452. Type **Check Number** at the end of the **Body**
453. Drag **CheckNumber** to the end of the **Body** and press the enter key
454. Click the **OK** button
455. Click the **Finish** button
456. Click **Save** on the **Process Designer Menu** and close the success confirmation
457. Click **Validate** on the **Process Designer Menu** and make sure that you receive a success message on the top of the process design

The initial configuration of the Expense Reimbursement Application is complete. The completed **Expense Reimbursement Process** is shown below.



458. Click the  **Application Builder** icon

Confidential © 2015, AgilePoint, Inc.

Check In and Publish the Application

Once the application has been configured and validated, the application should be checked in and published to the AgilePoint Portal for execution. Complete the following steps to check in and publish the Expense Reimbursement Application:

1. Click on **Expense Reimbursement** under **My Applications**
2. Click **Check In** on the **Application Builder Menu**
3. Click **OK**
4. Click **Publish** on the **Application Builder Menu**
5. Type **Expense Reimbursement Application** for the **Label**
6. Click the **OK** button and close the success confirmation

Execute and Test the Application

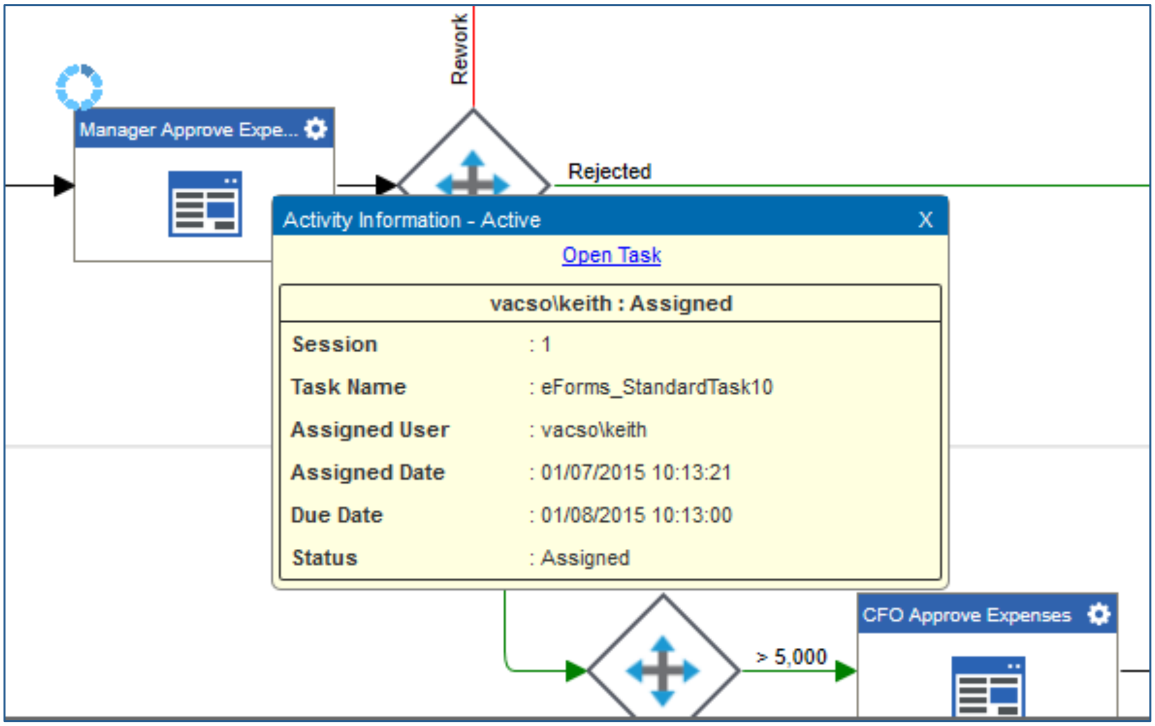
Once the custom application has been published, it is time to execute and test the application functionality, to ensure it meets the application requirements. To test the application's configuration, it is important to test each of the logical branches in the process. In this case, there are several conditions with two outcomes. To create a new instance of the Expense Reimbursement Application and test its configuration, complete the following steps:

1. Click the **Work Center** icon on the **Portal Menu**
2. Click the  **My Applications** icon in the left navigation
3. Click through the pages until you find the **Expense Reimbursement Application**
4. Click **Expense Reimbursement Process** to open **Expense Report**
5. Click the **Submit** button to see that the validation is working on all of the required fields
6. Enter values into each field on the **Expense Report** making sure that the **Total Expense** is less than 5,000 the first time
7. Click **Submit**
8. Click the  **Inbox** icon in the left navigation
9. Click the My **Tasks** tab
10. Click **View** and select **All Tasks**
11. **Manager Approve Expenses** will be visible in the list
12. If the task is not assigned to you, click the **Manager Approve Expenses** and click **Reassign Task**
13. Choose your account in the **Reassign To** and click **OK**
14. Click the  **Refresh** icon to update the **Tasks** list
15. Click **Manager Approve Expenses** and click **View Process** to see the status of the process as it executes

    Note: This is a very efficient way to verify that all of the branches of a process are tested
16. Drag the diagram until **Manager Approve Expenses** is visible

Confidential © 2015, AgilePoint, Inc.

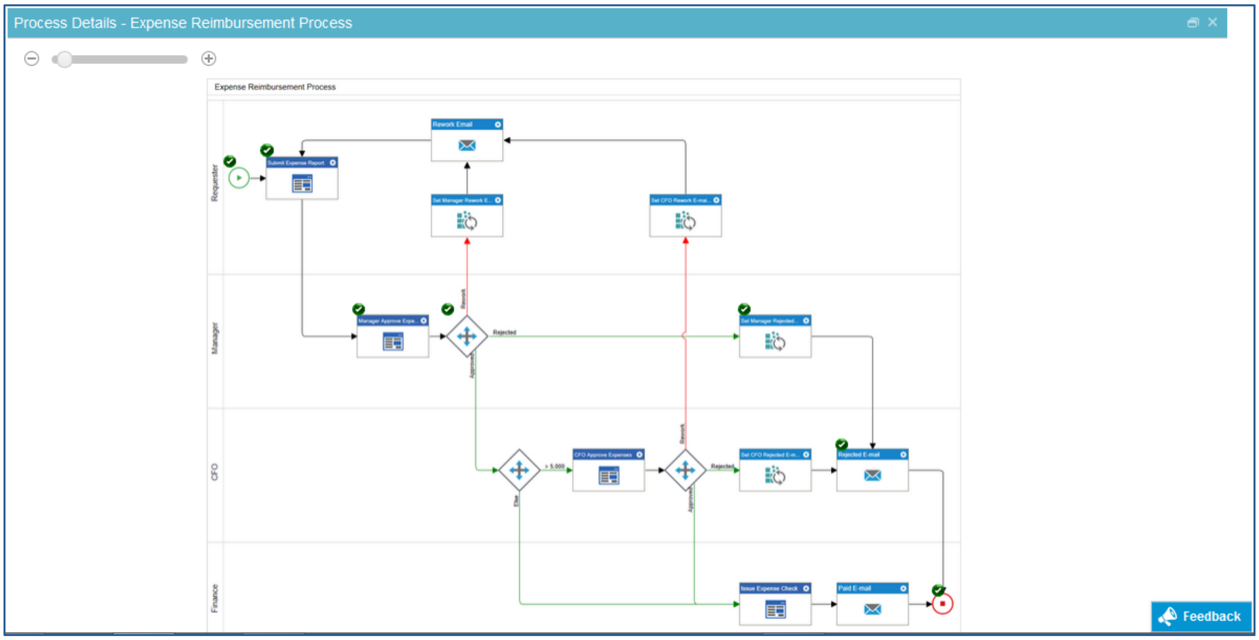
17. Click **Manager Approve Expenses** to view the **Activity Information**, as shown below



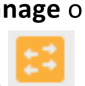
18. Click the **Open Task** link
19. Review the information on the **Expense Report** to ensure that the values are all displayed as read-only or disabled
20. Click the **Next** button
21. Click the **Submit** button to ensure that the mandatory validation is working for **Manager Decision**
22. **Manager Decision** and select **Reject**
23. Verify the mandatory condition was set when **Reject** was selected
24. Enter a comment into **Manager Comments**
25. Click the **Submit** button
26. Click the  **Maximize** icon on **Process Detail** to enlarge your view

Confidential © 2015, AgilePoint, Inc.

27. Use the **Increase** button or use the slider so the you can see the entire process diagram, as shown below



Note: The checks show the path that was executed, routing the process down the **Rejected** path to **Stop**

28. Close **Process Details**
29. Click **Manage** on the **Portal Menu**
30. Click the  **Runtime Management** icon and click **Notifications**
31. Select **Expense Reimbursement Process** for **Process Model Name**
32. Click **Sent** under **Status**
33. Click the **Search** button to see the **Rejected E-mail** notification and verify that the proper content was sent
34. Create two additional instances of the **Expense Reimbursement Application** to test the remaining branches in the **Expense Reimbursement Process**

Note: To test the **Expense Reimbursement Process** as quickly as possible, it is recommended that you use the following sequence:

1. Manager selects Reject
2. Manager selects Rework, Initiator Resubmits, Manager selects Approve, CFO selects Reject
3. Manager selects Approve, CFO selects Rework, Initiator Resubmits, Manager selects Approve, CFO selects Approve

Congratulations! You have completed your first custom application on the AgilePoint Portal

© 2015, AgilePoint, Inc.

using eForms.

© 2015, AgilePoint, Inc.