# *ZeroCodeWorkflow*

User Guide

## 1 Introduction

Recollect that when you created your ZeroCodeWorkflow database, you received a message that looked like this:-

Welcome to ZeroCodeWorkflow !
You are the ADMINISTRATOR of your organization, Precision Engineering Solutions Inc, whose unique Organization ID is **ELSBDJ**
In order to access the Main Menu, visit **https://zerocodeworkflow2.appspot.com**, and input your Organization ID.

Figure 1

You also received your default Administrator password in your email.

Accordingly, visit *https://zerocodeworkflow2.appspot.com*, whereupon you will see the following screen:-

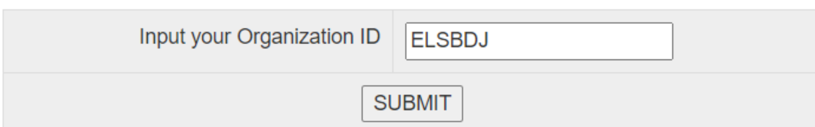



Figure 2

Now input your Organization ID, let us say ELSBDJ, and click **SUBMIT**. You will now see the **Main Menu** of *ZeroCodeWorkflow*:-


Figure 3

You, being the Administrator, should now click ADMINISTRATOR, whereupon you will see the following login screen:-

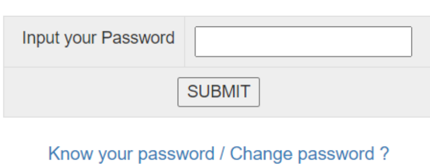



Figure 4

Now input your password and click **SUBMIT**.

If you do not remember your password, click *Know your password / Change password ?* in the login screen (Figure 4), whereupon you will see the following forms:-

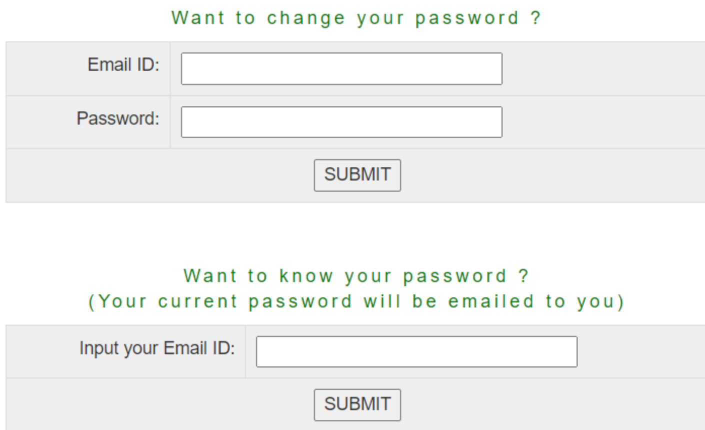
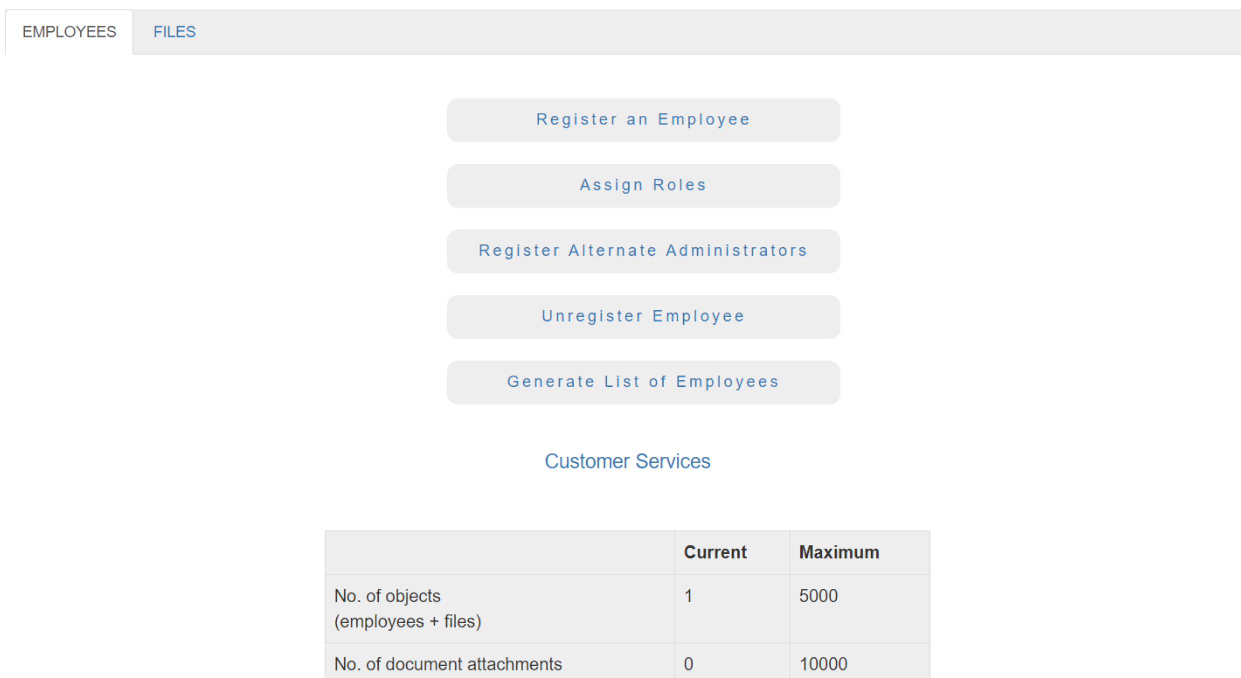



Figure 5

In the lower form, input your Email ID and click **SUBMIT**, whereupon you should see your password in your email INBOX, else in your spam folder. If you did not receive your password in your email, repeat the process, whereupon you should definitely see your password in your email.

When you input your password and click **SUBMIT** in the login screen (Figure 4), you will see the following **Admin Main Menu**:-




| | Current | Maximum |
|---|---|---|
| No. of objects (employees + files) | 1 | 5000 |
| No. of document attachments | 0 | 10000 |

Figure 6

# 2 REGISTERING EMPLOYEES

The first thing to do is to register your employees. You do not have to register all your employees, but *only those who will be process participants (i.e., actors) in your important business processes which you wish to automate using ZeroCodeWorkflow*.

Click **Register an Employee** in the **Admin Main Menu** (Figure 6), whereupon you will see the following form:-

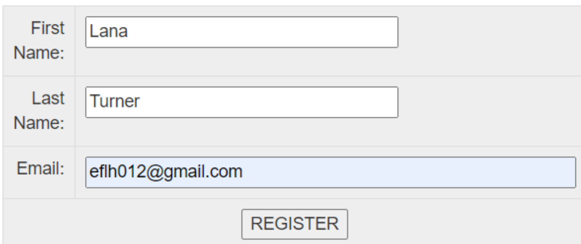



Figure 7

Input the First Name, Last Name, and Email ID of the employee as shown above, then click **SUBMIT**, whereupon you will see a success message. Simultaneously, the employee receives his / her default password, and unique Employee ID in his / her email.

In order to see the list of all employees registered so far, click **Generate List of Employees**:-

LIST OF EMPLOYEES

| Sl. No. | Unique Employee ID | Name | Email |
|---|---|---|---|
| 1 | ADMIN8 | Samantha Hughes | eflh011@gmail.com |
| 2 | ADMIN9 | Sean Connery | eflh013@gmail.com |
| 3 | ADMIN4 | Sandra Bullock | eflh007@gmail.com |
| 4 | ADMIN2 | Jim Kelly | eflh004@gmail.com |
| 5 | ADMIN3 | Burt Lancaster | eflh006@gmail.com |
| 6 | ADMIN6 | Spencer Tracy | eflh009@gmail.com |
| 7 | ADMIN5 | Mike Stewart | eflh008@gmail.com |
| 8 | ADMIN1 | Sarah Connor | eflh003@gmail.com |
| 9 | ADMIN7 | Gordon O'Roorke | eflh012@gmail.com |

Current assigned roles

| Employee | Roles |
|---|---|
| ADMIN8::Samantha Hughes | -- |
| ADMIN9::Sean Connery | -- |
| ADMIN4::Sandra Bullock | -- |
| ADMIN2::Jim Kelly | -- |
| ADMIN3::Burt Lancaster | -- |
| ADMIN6::Spencer Tracy | -- |
| ADMIN5::Mike Stewart | -- |
| ADMIN1::Sarah Connor | -- |
| ADMIN7::Gordon O'Roorke | -- |

Figure 8

Please note that only registered employees can participate in business processes by clicking EMPLOYEES in the **Main Menu** (Figure 2) and logging in.

# 3 ASSIGNING ROLES

Notice from Figure 8 that roles have not yet been assigned to any of the employees. Assigning roles is an optional, but useful and user-friendly, step. The assigned role will typically be the job function of the employee. We will now proceed to assign the following roles to the above employees (Figure 8):-

| | |
|---|---|
| Sandra Bullock | Sales Rep |
| Mike Stewart | Sales Rep |
| Jim Kelly | Manager (Purchase) |
| Burt Lancaster | Storekeeper |
| Samantha Hughes | Manager (Finance) |
| Gordon O'Roorke | Dispatch Clerk |

In order to assign roles to employees, Administrator must click **Assign Roles** in the **Admin Main Menu** (Figure 6). For example, to assign the role to Sandra Bullock, click **Assign Roles**, whereupon you will see the following form:-

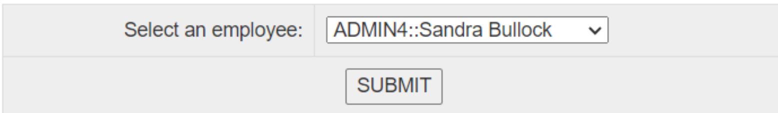



Figure 9

Select Sandra Bullock as shown, then click **SUBMIT**, whereupon you will see the following form:-

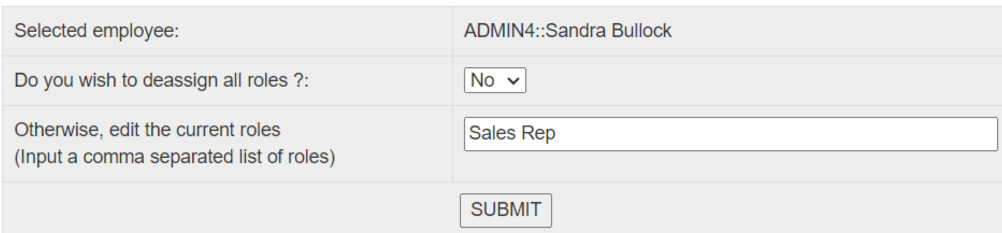



Figure 10

Enter “Sales Rep” in the second field, as shown, then click **SUBMIT**, whereupon you will see a success message.

Notice in Figure 10 that an employee (actor) can play more than one role. Furthermore, he / she can be deassigned all roles currently assigned.

If you now click **Generate List of Employees**, you will see the following list:-

LIST OF EMPLOYEES

| Sl. No. | Unique Employee ID | Name | Email |
|---|---|---|---|
| 1 | ADMIN8 | Samantha Hughes | eflh011@gmail.com |
| 2 | ADMIN9 | Sean Connery | eflh013@gmail.com |
| 3 | ADMIN4 | Sandra Bullock | eflh007@gmail.com |
| 4 | ADMIN2 | Jim Kelly | eflh004@gmail.com |
| 5 | ADMIN3 | Burt Lancaster | eflh006@gmail.com |
| 6 | ADMIN6 | Spencer Tracy | eflh009@gmail.com |
| 7 | ADMIN5 | Mike Stewart | eflh008@gmail.com |
| 8 | ADMIN1 | Sarah Connor | eflh003@gmail.com |
| 9 | ADMIN7 | Gordon O'Roorke | eflh012@gmail.com |

Current assigned roles

| Employee | Roles |
|---|---|
| ADMIN8::Samantha Hughes | Manager (Finance) |
| ADMIN9::Sean Connery | -- |
| ADMIN4::Sandra Bullock | Sales Rep |
| ADMIN2::Jim Kelly | Manager (Purchase) |
| ADMIN3::Burt Lancaster | Storekeeper |
| ADMIN6::Spencer Tracy | -- |
| ADMIN5::Mike Stewart | Sales Rep |
| ADMIN1::Sarah Connor | -- |
| ADMIN7::Gordon O'Roorke | Dispatch Clerk |

Figure 11

# 4 CREATING AN ADMINISTRATION TEAM

In the very beginning, you, the original Administrator, will be the only one who can login (Figure 4) and function as Administrator. You can create an Administration Team by registering one or more of your employees as Additional Administrators.

Suppose you wish to add Mike Stewart and Spencer Tracy to your Administration Team. Click **Register Alternate Administrators** in the **Admin Main Menu**, whereupon you will see the following form:-

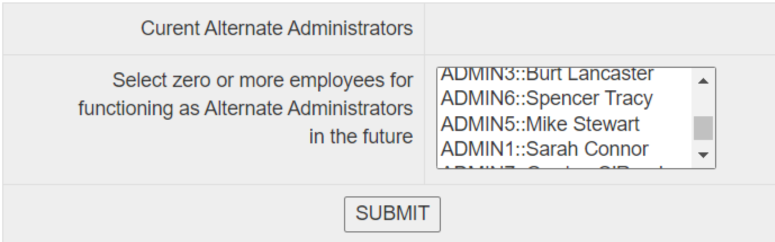



Figure 12

Select both ADMIN5::Mike Stewart and ADMIN6::Spencer Tracy as shown below:-

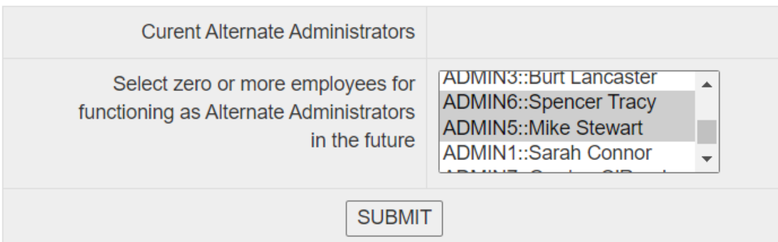



Figure 13

Now click **SUBMIT**, whereupon you will see the following screen:-

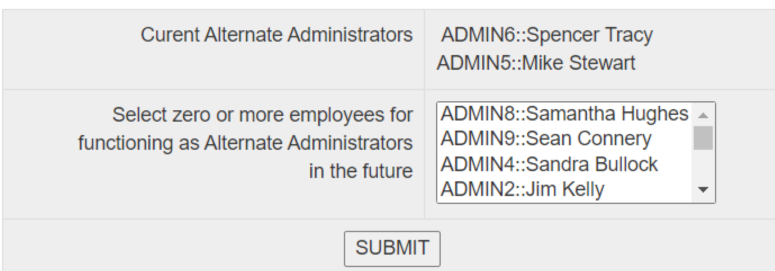



Figure 14

From now onwards, both Mike Stewart and Spencer Tracy can login (Figure 4), and access the **Admin Main Menu** , i.e., function as Administrator, in addition to yourself, the original Administrator.

# 5 FILES

A file encapsulates the status of a business process instance. Administrator cannot access a current process instance, but can view an archived instance. The utilities available to the Administrator can be found under the **FILES** tab of the **Admin Main Menu** (Figure 6):-

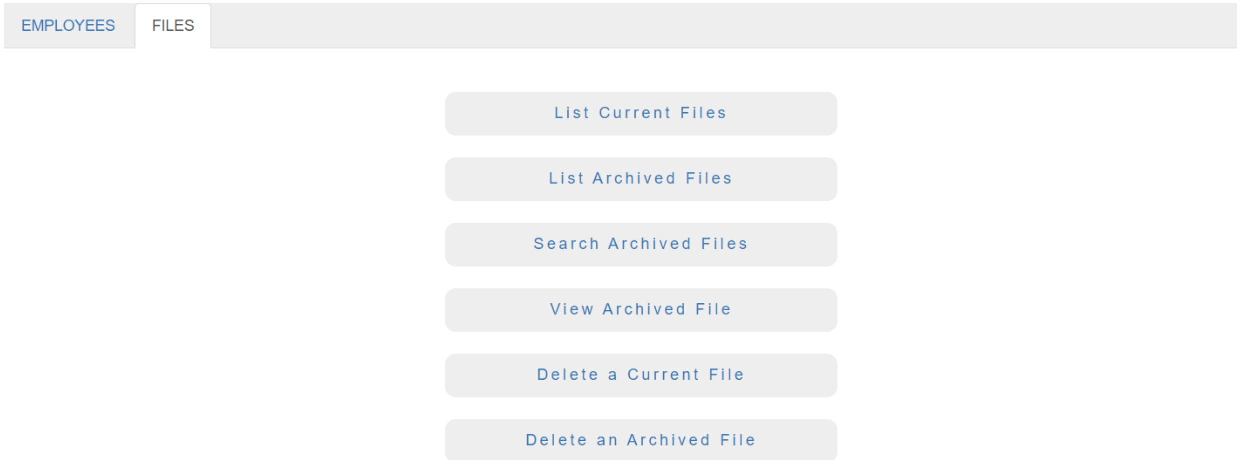



Figure 15

# 6 CUSTOMER SERVICES

*Only the original Administrator* can click **Customer Services** in the **Admin Main Menu** (Figure 6), and avail the services of SAAS PROCESSES PRIVATE LIMITED. Upon clicking **Customer Services**, this is the login form he / she would see:-

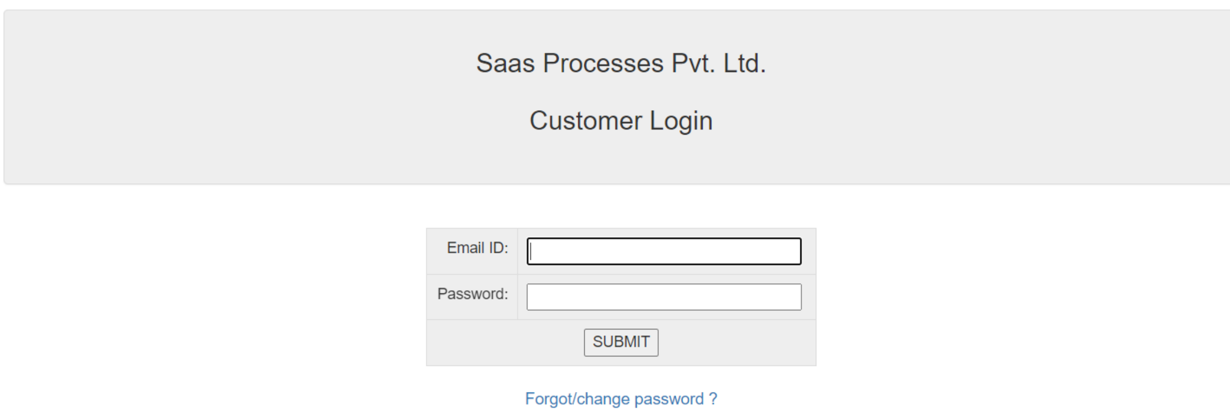



Figure 16

Caution: The original Administrator must login using his / her *Customer Services password*, which is different from his Administrator password. In order to retrieve or change his / her Customer Services password, he / she should click Forgot/change password ? in Figure 16.

Upon logging in, he / she can access the following **Customer Services Menu**:-

HELPDESK

VIEW STATEMENT

MAKE PAYMENT

Figure 17

Click HELPDESK, in order to avail our support. We will typically respond within 1 working day.

Click VIEW STATEMENT, in order to view your account statement.

Click MAKE PAYMENT, in order to make online payment of SaaS charges to SAAS PROCESSES PVT. LTD.

# 7 CREATING AND ACCESSING BUSINESS PROCESS INSTANCES

An employee can click EMPLOYEES in the **Main Menu** (Figure 2), and login, whereupon he / she will see the following button:-

ZeroCodeWorkflow

Figure 18

If he / she now clicks ZeroCodeWorkflow, he / she will be able to :-

1. Originate a business process instance
2. Access the file encapsulating the status of a process instance awaiting his / her attention and action thereon, then
    a. Take necessary action, i.e., play his / her role
    b. Make appropriate notes in the file
    c. Attach any necessary documents to the file
    d. Route the file to one or more other employees (actors), who need to take further action