*Ability*Suite® (R3)

Advanced Lifecycle Management Module

Database / Application Manager Manual

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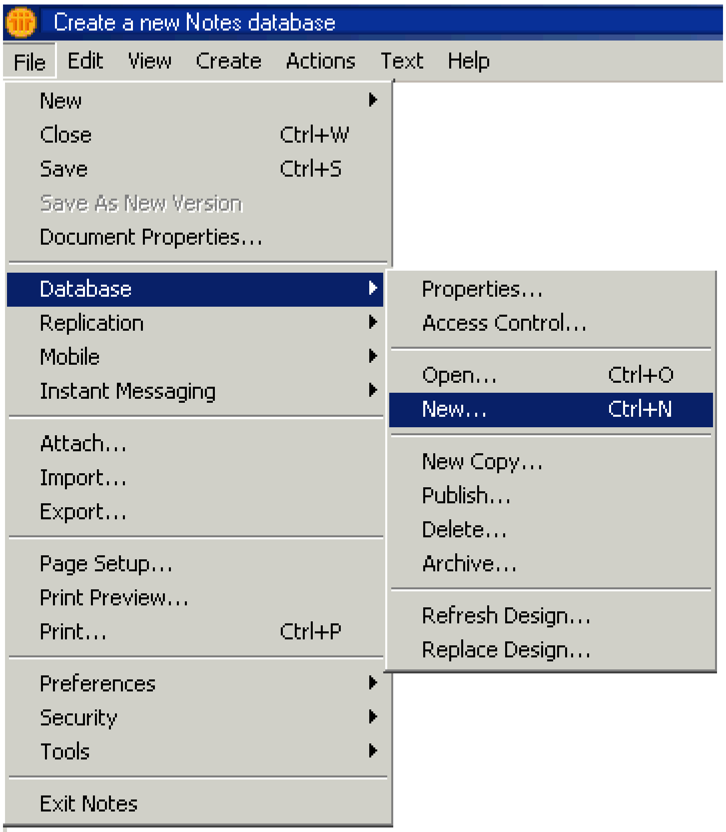
Creating a New AdaptAbility™ from the Template

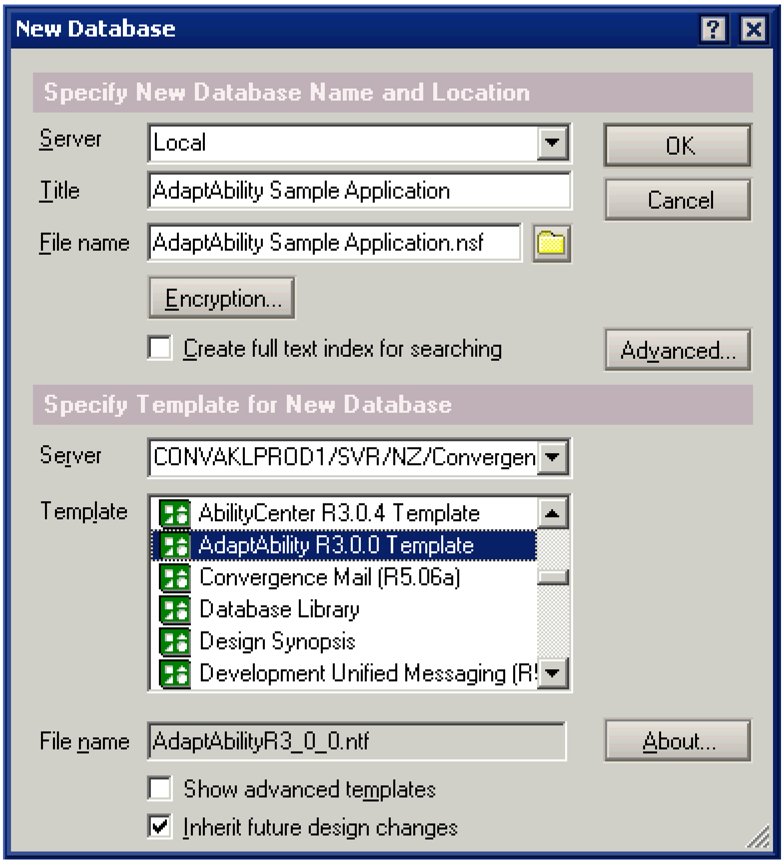
To create a new AdaptAbility™ from the template perform the following steps:

- In the Lotus Notes menu select **File -- Database -- New** as shown below.

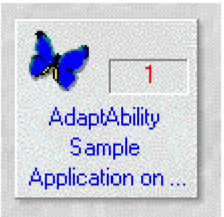


- In the resulting dialogue:

1. Select the server on which you wish to create the AdaptAbility™ database.
2. Enter the name of the new AdaptAbility™ application and select a location.
3. Click on the 'Template Server' button and select the server that contains the AdaptAbility™ template.
4. Click the 'OK' button.
5. Select the AdaptAbility™ template in the box labelled Template Server.
6. Click the 'OK' button.



- You have now created the AdaptAbility™ database. It will appear on your workspace as shown below:



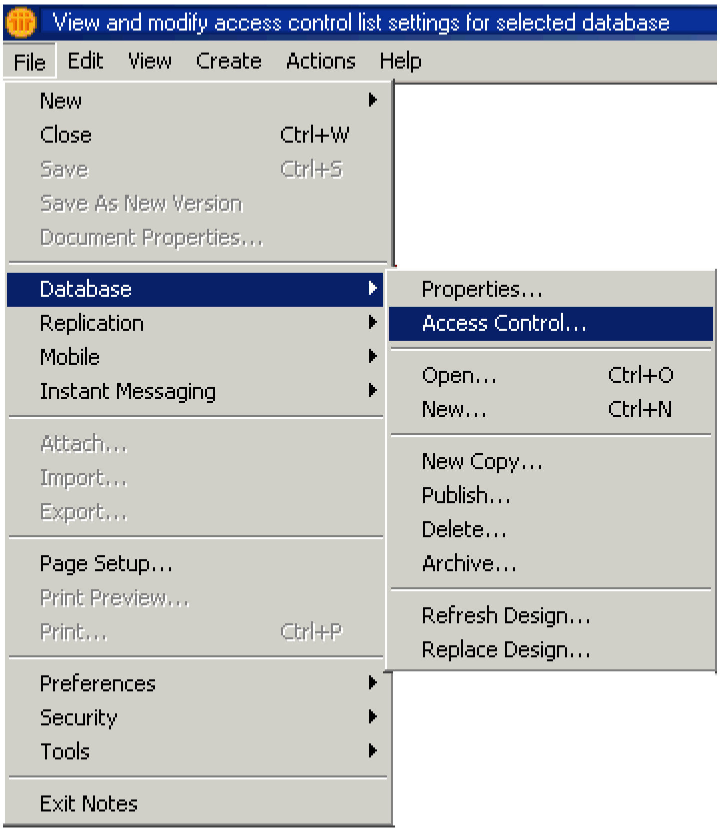
Setting the Security (ACL)

Setting the Security (ACL)

To set the required security or Access Control List (ACL) for the AdaptAbility™ application, perform the following steps:

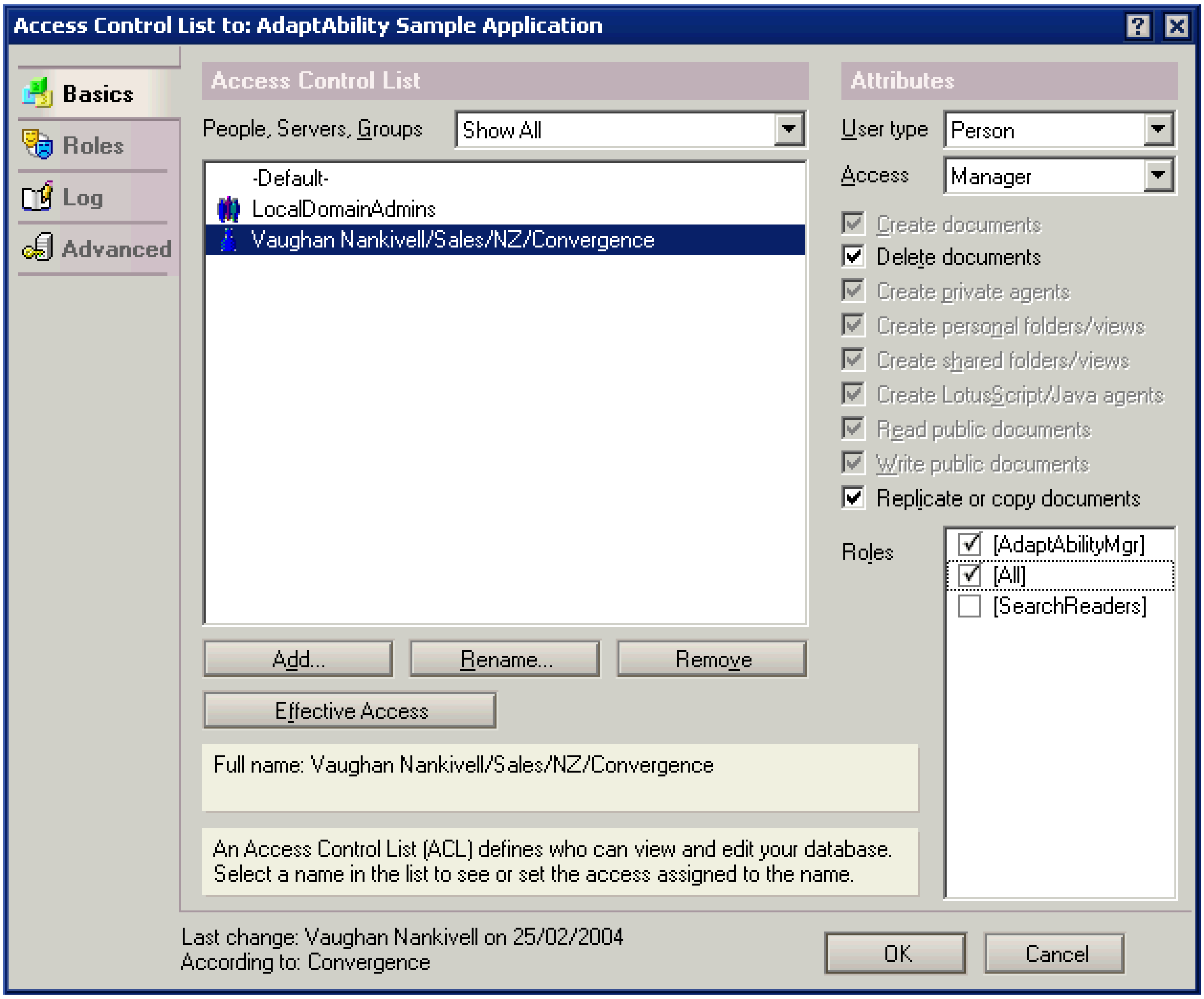
- Highlight the AdaptAbility™ database that you have created by single clicking on the database icon.

- From the Lotus® Notes menu, select **File -- Database -- Access Control**.



- In the resulting dialogue perform the following steps:

1. Click the 'Add' button
2. In the Input box either Enter your full Lotus Notes name, or Click on the person button and select your name from the Name and Address Book.
3. In the User Type dropdown select 'Person'.
4. In the Access dropdown select 'Manager'
5. In the Roles box tick [All] and [AdaptAbilityMgr].
6. Click 'O.K' to save your changes.

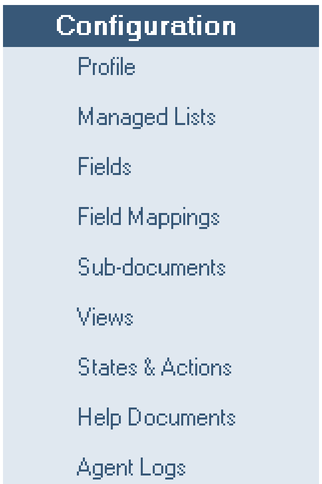


The Configuration Screen

The Configuration Screen

Once you have chosen '**Configure**' you are ready to begin building your AdaptAbility™ Workflow Process.

The options are listed in a logical order to make this process as simple and intuitive as possible:



These options will take you to the various screens to enable you to manage your AdaptAbility™

application. The options and their usage are explained fully in the appropriate sections of the manual.

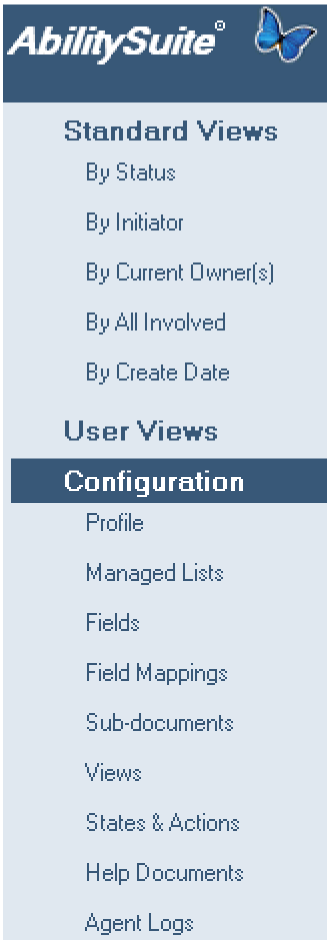
Getting Started With Configuration

Getting Started With Configuration

To begin the configuration of the AdaptAbility™ application, perform the following steps:

- Open the AdaptAbility™ database that you have created by double clicking on the database icon. The database will open to the first view.

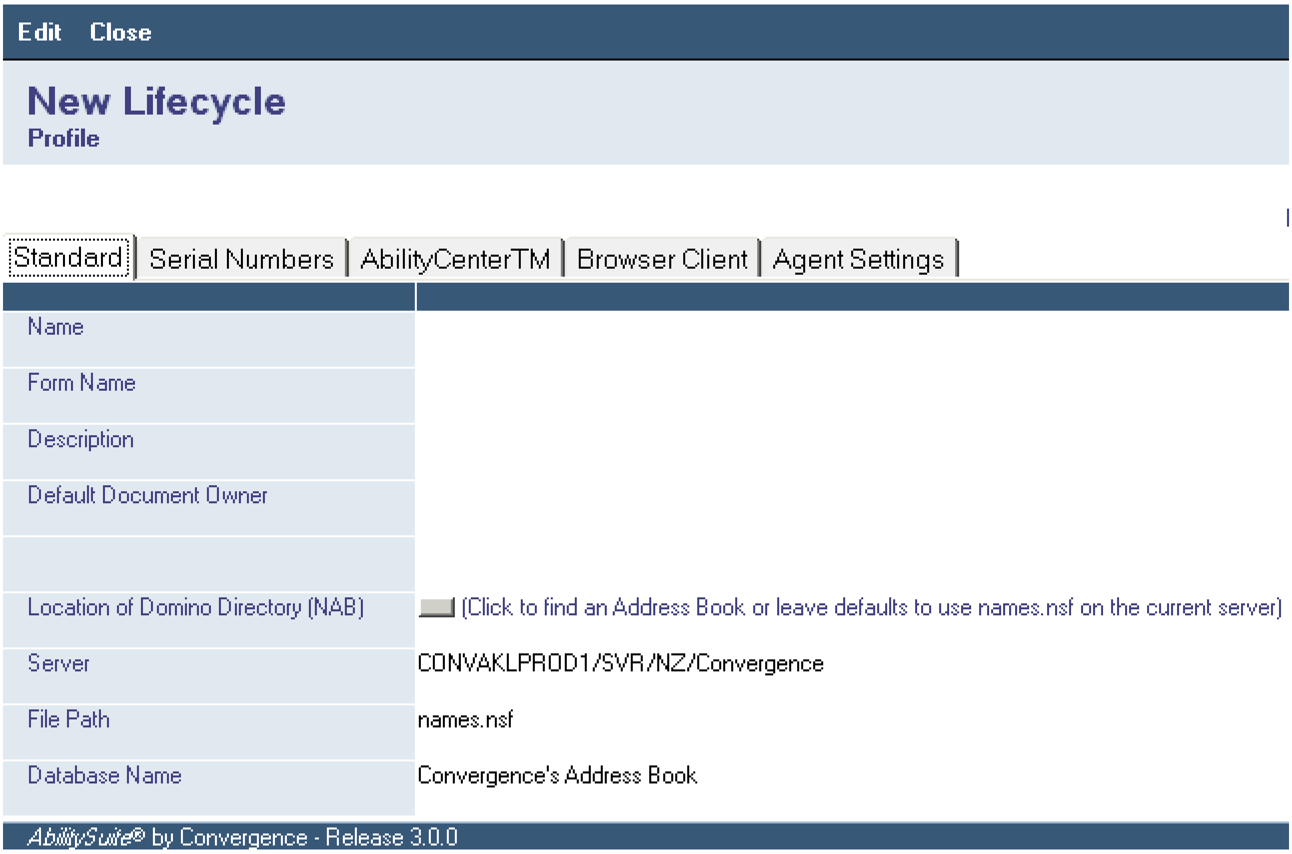
- Click on the "**Configure**" menu from the left-hand tool-bar. This opens the configuration options for the AdaptAbility™ application as shown below.



Profile - The Standard Tab

Profile - The Standard Tab

The AdaptAbility™ "**Profile - Standard**" configuration settings can be accessed by clicking on the appropriate tab and sub-tab from within the Configuration profile:



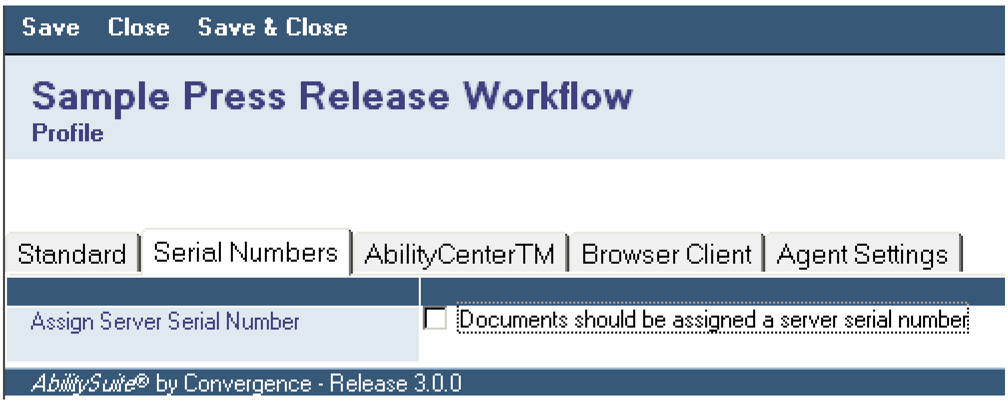
The "**Profile - Standard**" screen contains the following fields:

Workflow Name	This is simply the name of the application.
Form Name	This is simply the name of the form.
Workflow Description	A brief description of the purpose of the application.
Default Document Owner	The default owner of any document mailed into the database if one has not been specified for the document.
Location of Domino Directory (NAB)	Details of the Name and Address Book on the server that the application will use.

Profile - The Serial Numbers Tab

Profile - The Serial Numbers Tab

The AdaptAbility™ "**Profile - Serial Numbers**" configuration settings can be accessed by clicking on the appropriate tab:



The "**Profile - Serial Numbers**" screen contains a simple check box, that is checked if a server serial number should be assigned or left unchecked if not required.

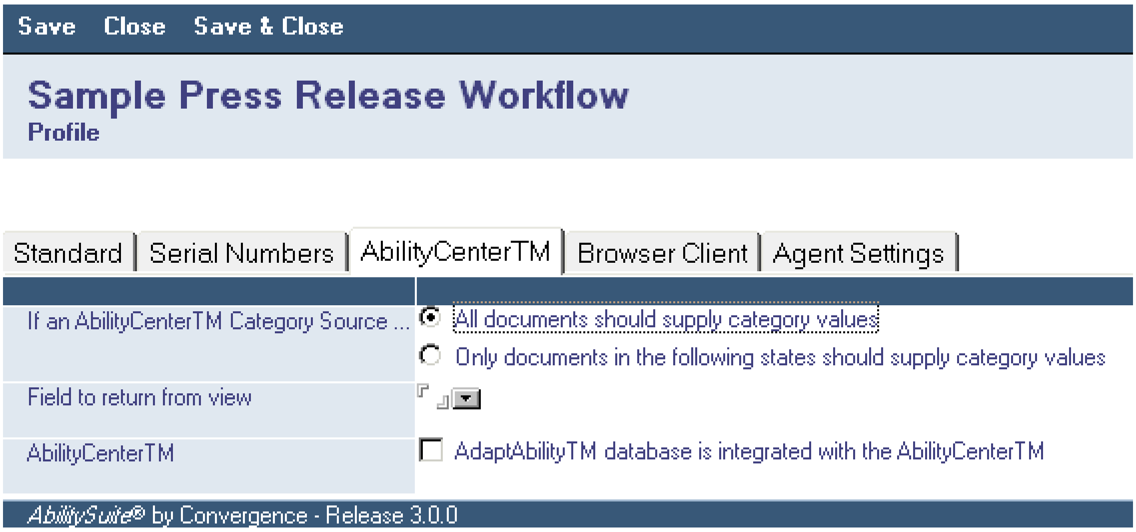
Profile - The AbilityCenter™ Tab

Profile - The AbilityCenter™ Tab

AbilityCenter™ Enablement

If your organisation is using the AbilityCenter™ Central Search Portal, it is useful to link it to any new AdaptAbilty™ workflow applications created. This will allow you to perform searches across multiple AdaptAbility™ applications from the central search portal screen.

To link a new AdaptAbility™ application to an AbilityCenter™, update the "**Profile - Ability Center**" configuration settings by clicking on the appropriate tab:

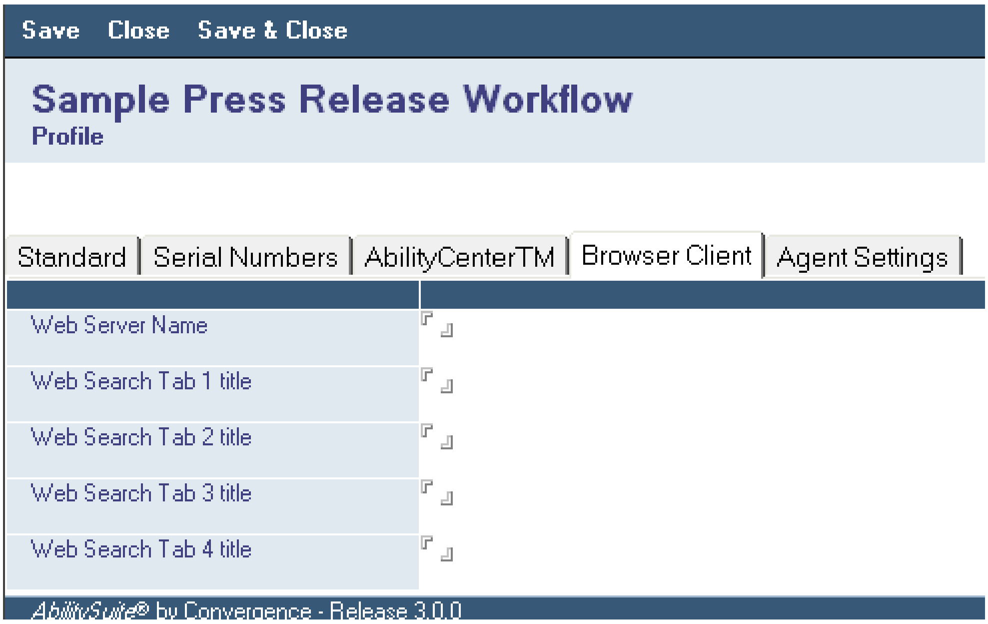


The "**Profile - Ability Center**" screen contains the following fields:

If AdaptAbility is an AbilityCenter™ Category Source...	An AdaptAbility™ application can be used as the source for Category Values. Select if all documents should supply category values or only if documents are in certain states.
Field to return from view	The field to be used as the source for the category value.
AbiltyCenter™	This checkbox would be checked if integration with AbilityCenter™ is required.

Profile - The Browser Client Tab

The AdaptAbility™ "**Profile - Browser Client**" configuration settings can be accessed by clicking on the appropriate tab:



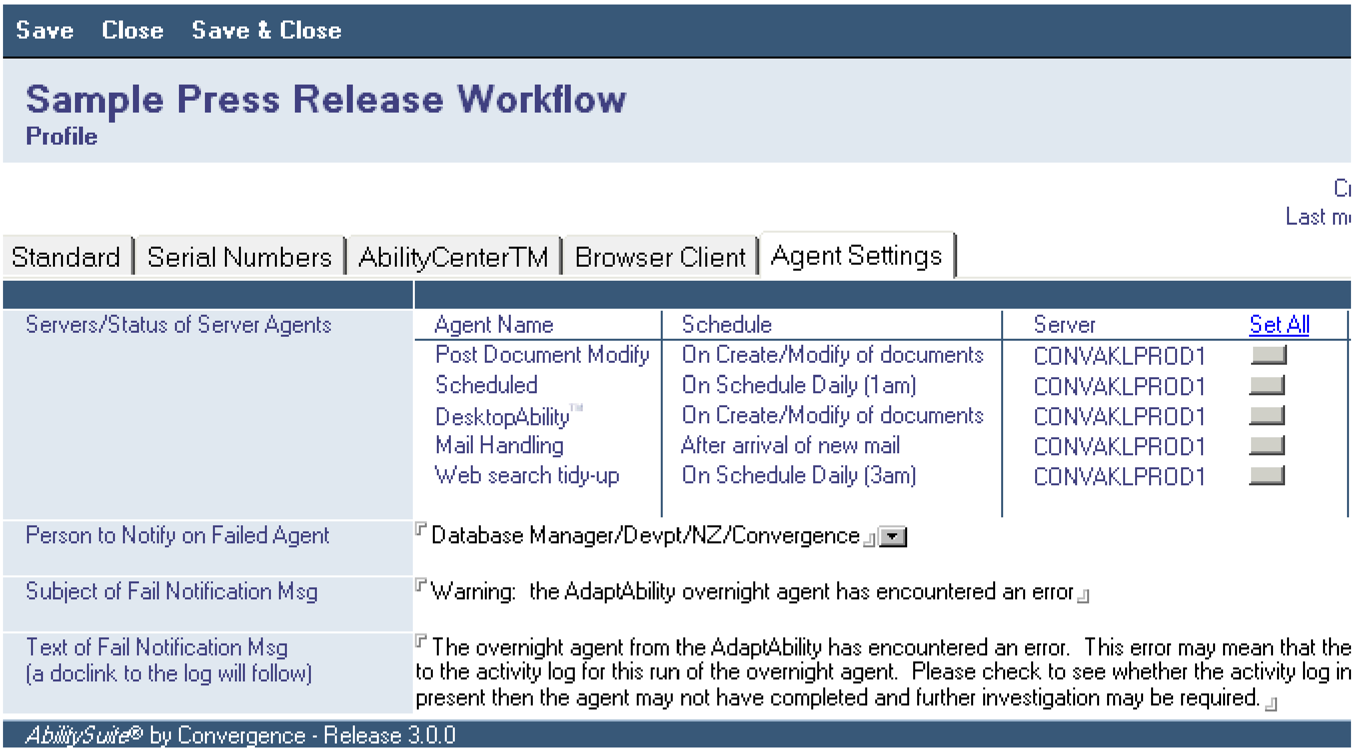
The "**Profile - Browser Client**" screen contains the following fields:

Web Server Name	If using AdaptAbility™ through a browser this is the server URL.
Web Search Tabs	If using a browser these are the labels for the four tabs on the search screen.

Profile - The Agent Settings Tab

Profile - The Agent Settings Tab

The AdaptAbility™ "**Profile - Agent Settings**" configuration can be accessed by clicking on the appropriate tab:



The "**Profile - Agent Settings**" screen contains the following fields:

Servers/ Status of Server	This sets the server for each agent to run on.

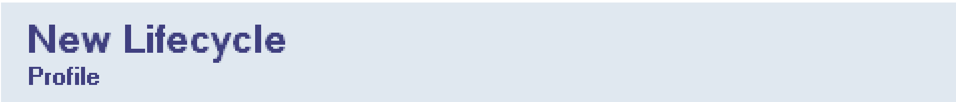
Agents	
Person to Notify on Failed Agent	Usually the database Manager / Owner.
Subject of Fail Notification Msg.	The subject that will appear in the failed agent email message.
Text of Fail Notification Msg.	The message that will be delivered via email on failure of an agent.

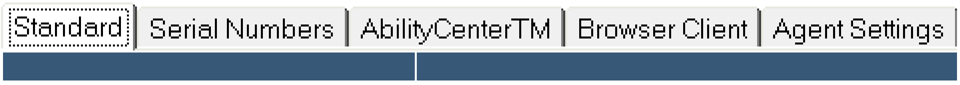
Profile - Setting the Basic Attributes of the AdaptAbility™

Profile - Setting the Basic Attributes of the AdaptAbility™

The "**Profile**" options are conveniently split into five tabs of their own to facilitate the configuration process:

1. Standard
2. Serial Numbers
3. AbilityCenter™
4. Browser Client
5. Agent Settings





These tabs will take you to the various screens to enable you to manage the AdaptAbility™ Workflow Basics. The tabs and their usage are explained fully in the appropriate sections of the manual.

Defining Managed Lists - AdaptAbility™ Roles

Defining Managed Lists - AdaptAbility™ Roles

Managed Lists enable the specification of who will be involved in the workflow process and what their roles will be. To create Managed Lists, select the **'Managed Lists'** screen from the left-hand toolbar, and click on the **'Add Managed List'** button conveniently located on the top toolbar.

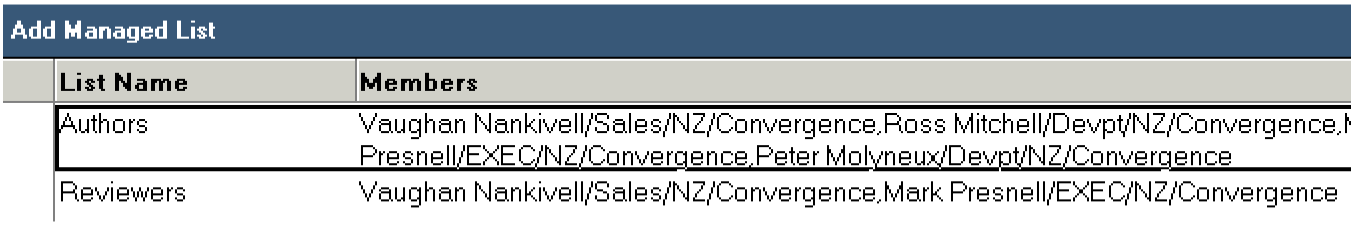
Once you have chosen **'Add Managed List'** you will be presented with a screen that will allow you to specify the managed list details:

The fields available for completion are:

List Name	The title of what the people in this list do. (e.g. Authors, Authorisers, Reviewers etc.)
List Description	A brief description of the role of people in this list.
List Members	The members of this list are selected from the NAB (people and / or groups). If a group is selxcted it will appear in the Managed List as the group rather than the individuals that make up the group. i.e. Groups are not expanded to their individual members.

Once you have created a managed list choose **'Save'** or **'Save & Close'** to save the changes. Please note that selecting **'Close'** will close the managed list **without** saving any changes.

In this example of a Press Release Application, we have created two managed lists - "Authors" and "Reviewers":



> **Note:**
> Different processes that are built with AdaptAbility™ will have varying numbers of **'Managed Lists'** dependent on the complexity of the process that is being built. There is no limit to the number of **'Managed Lists'** you can create when building a workflow process using AdaptAbility™. For instance, a workflow process may have document authors, authorisers, reviewers and a distribution list etc.

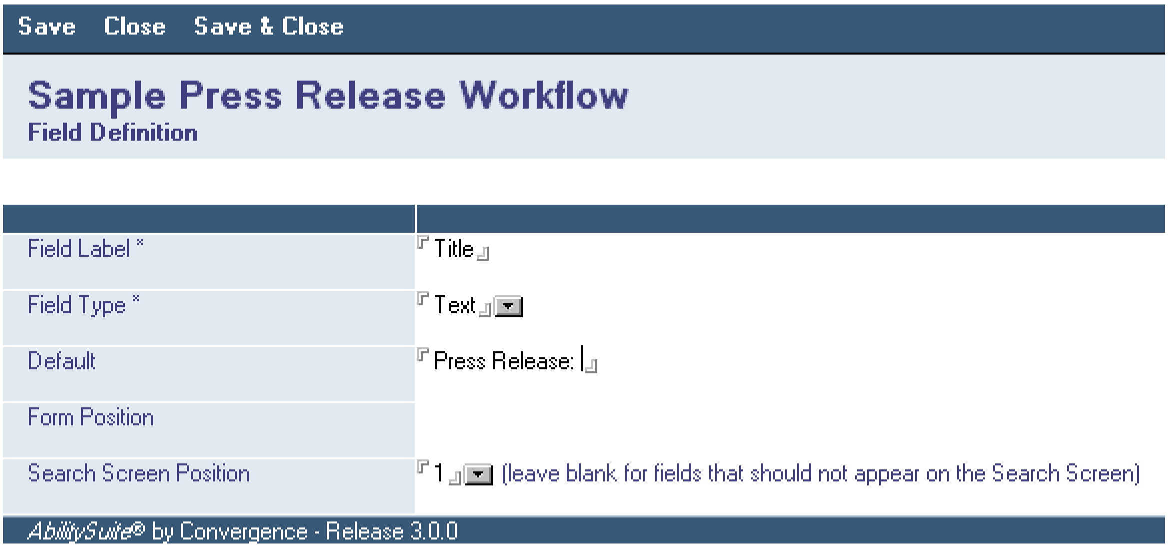
Defining a Text Field

Defining a Text Field

Select the **'Fields'** option in the left-hand toolbar menu, and then click on the **'Create Field'** button from the toolbar at the top of the screen to display the field definition screen. To create a Text field, enter the name of the field and select 'Text' as the field type.

A Text field allows users to enter free text information into a field. Giving the user the ability to free text information can be important in fields where information is likely to be different with each application of the process. An example of this would be the provision of a subject or comments field for users to complete.

The following example for the Press Release form creates a Text field labelled **'Title'** and a default value for insertion in the form, as each press release will have a unique title associated with them:



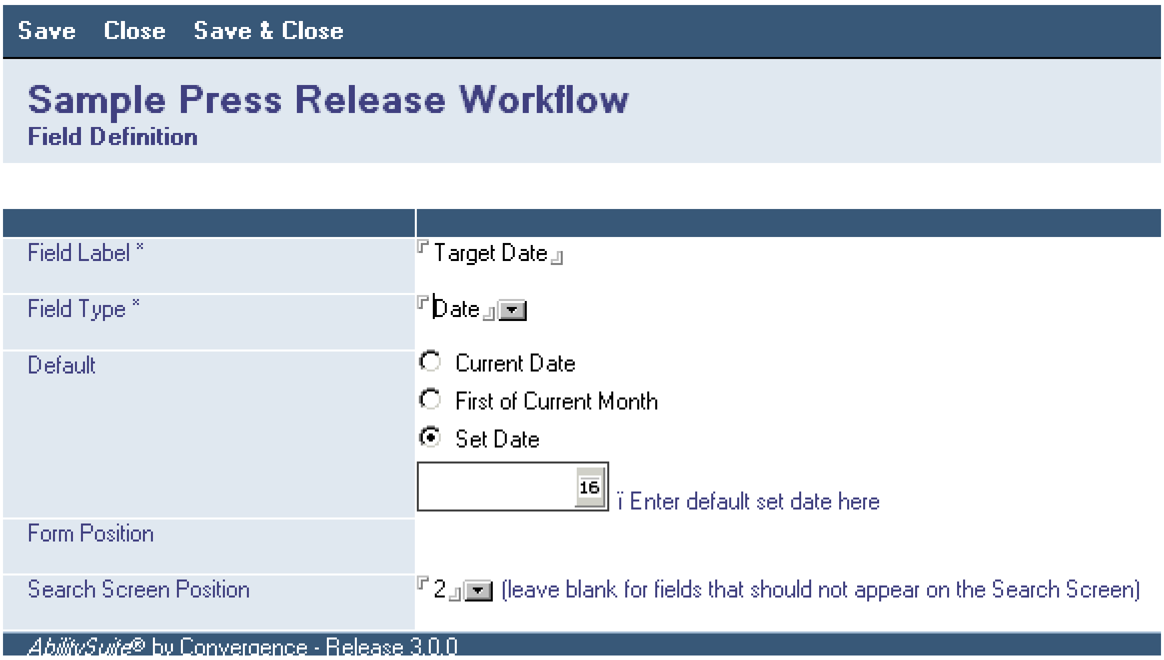
Once you have created the field, choose '**Save**' or '**Save & Close**' to save the form. Please note that selecting '**Close**' will close the definition **without** saving any changes.

Defining a Date Field

Defining a Date Field

Select the '**Fields**' option in the left-hand toolbar menu, and then click on the '**Create Field**' button from the toolbar at the top of the screen to display the field definition screen. To create a Date field, enter the name of the field and select 'Date' as the field type.

The example below creates a "Date" field called "Target Date" that represents the projected date when the press release is to be released:



There are a number of possible default options to choose from:

Current Date	This will put in the days date that the document is created on.
First of Current Month	This will default to the first day of the month.
Set Date	This will put in a date that has being selected by the creator of the database.

The most common choice however is to select none of these options and allow the author to set the date themselves. This can be particularly useful if there is workflow associated with the date where certain tasks or action items must be performed within a certain time-frame.

Once you have created the field, choose **'Save'** or **'Save & Close'** to save the form. Please note that selecting **'Close'** will close the definition **without** saving any changes.

Defining a Dropdown or Multiple Selection Field

Defining a Dropdown or Multiple Selection Field

Select the **'Fields'** option in the left-hand toolbar menu, and then click on the **'Create Field'** button from the toolbar at the top of the screen to display the field definition screen. To create a keyword field, enter the name of the field and select either 'Drop-down' or 'Multiple Selection' as the field type.

'Drop-down' & **'Multiple Selection'** fields are useful when there is a known set of options that you want users to select from. If the field is made **'Multiple Selection'** users can choose a number of options from the predefined list. If the field is made **'Drop-down'** users can only choose one of the options from the predefined list.

The example below creates a 'Drop-down' field called "Location". The options that you want to allow users to select from should be filled out in the options field as shown below:

The 'Default' field allows one of the values to be pre-selected whenever a new document is created.

Once you have created the field, choose **'Save'** or **'Save & Close'** to save the form. Please note that selecting **'Close'** will close the definition **without** saving any changes.

Defining a Names Field

Defining a Names Field

Select the **'Fields'** option in the left-hand toolbar menu, and then click on the **'Create Field'** button from the toolbar at the top of the screen to display the field definition screen. To create a Names field, enter the name of the field and select either 'Names - Single' or 'Names Multiple' as the field type.

The example below creates a 'Names - Single' field called **'Author'**, with a default value of the user who is creating the document. For example, this could be the person submitting a press release for approval:

Save **Close** **Save & Close**

Sample Press Release Workflow
Field Definition

Field Label *	Author
Field Type *	Names - Single
	☑ Add values to - All Involved - field
Options *	Authors
Default	◉ Current User ○ Set User from Address Book
Form Position	Field 4
Search Screen Position	3 (leave blank for fields that should not appear on the Search Screen)

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Alternatively, the default could have been set to an individual selected from the name and address book:

Save **Close** **Save & Close**

Sample Press Release Workflow
Field Definition

Field Label *	Author
Field Type *	Names - Single
	☑ Add values to - All Involved - field
Options *	Authors
Default	○ Current User ◉ Set User from Address Book Bob Smith ï Choose default person here
Form Position	Field 4
Search Screen Position	3 (leave blank for fields that should not appear on the Search Screen)

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The last field on the form **'Search Screen Position'** determines if users will be able to search for documents based on the value stored in this field. If it is left blank, it will not be searchable. Any other value determines the position that it will appear on the screen.

Once you have created the field, choose **'Save'** or **'Save & Close'** to save the form. Please note that selecting **'Close'** will close the definition **without** saving any changes.

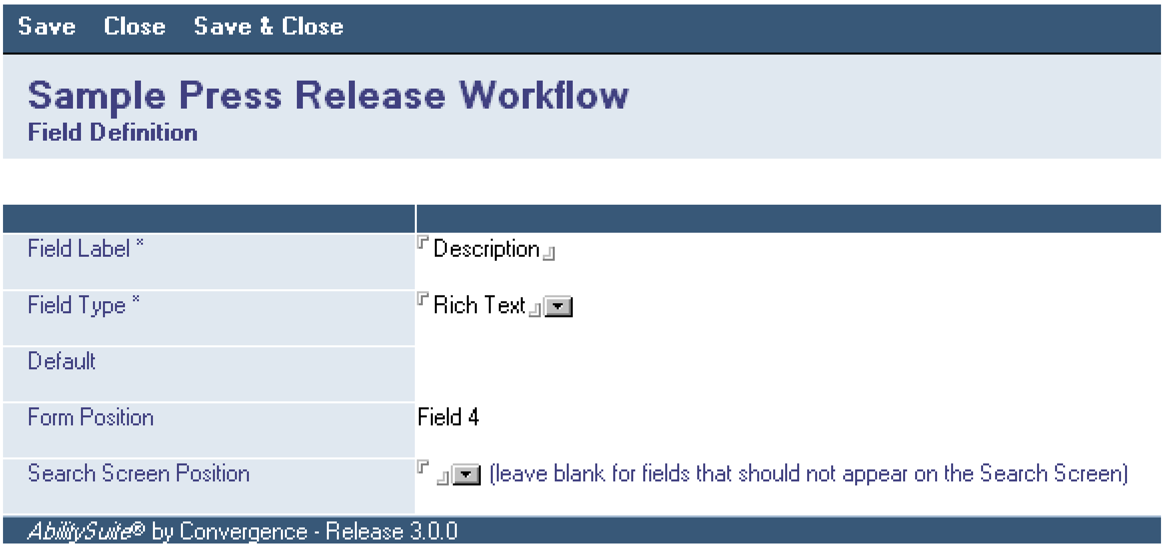
Defining a Rich-Text Field

Defining a Rich-Text Field

Select the **'Fields'** option in the left-hand toolbar menu, and then click on the **'Create Field'** button from the toolbar at the top of the screen to display the field definition screen. To create a Rich-Text field, enter the name of the field and select 'Rich Text' as the field type.

A **'Rich Text Field'** is particularly useful when you need to enter something into the form other than standard text, such as Microsoft Word documents or JPEG images.

The following example creates a Rich-Text field labelled **'Description'**:



Once you have created the rich-text field, choose **'Save'** or **'Save & Close'** to save the form. Please note that selecting **'Close'** will close the definition **without** saving any changes.

Defining a Category Field

Defining a Category Field

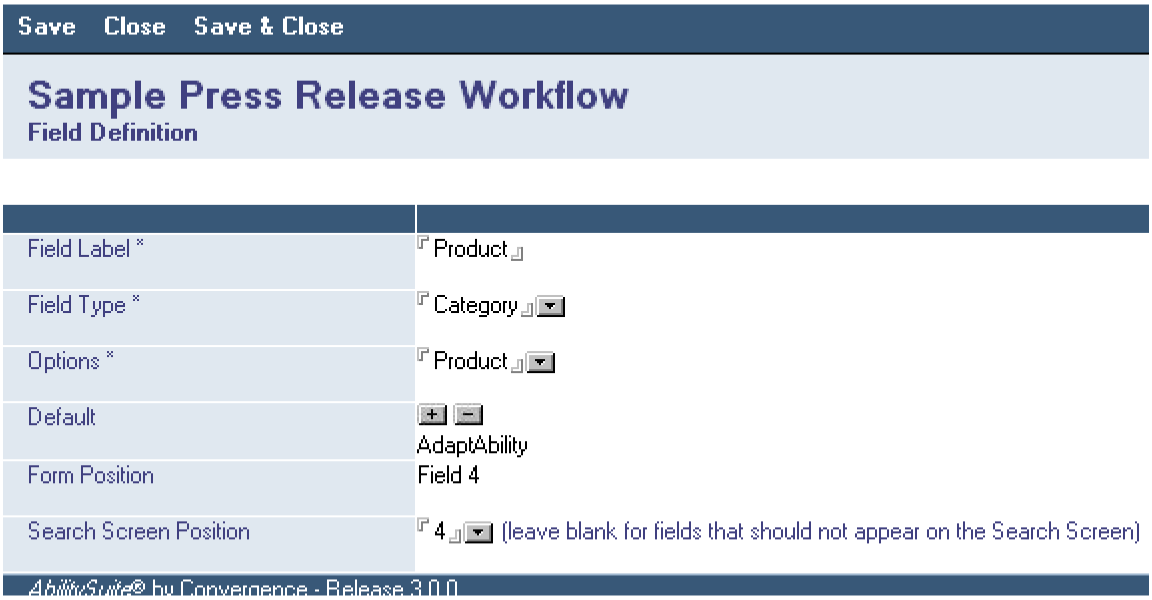
> **Note:**
> The field type Category is only available once the AdaptAbility™ has been linked to an AbilityCenter™ via the 'Profile - Standard' configuration option.

Select the **'Fields'** option in the left-hand toolbar menu, and then click on the **'Create Field'** button from the toolbar at the top of the screen to display the field definition screen. To create a category field, enter the name of the field and select 'Category' as the field type.

Category fields become available as a search option from the main search screen of the " **AbilityCenter™**".

Fields that store information commonly used across the **'Corporate Information Space'**should be defined as Category fields. For example, a company that is involved in the sale and delivery of projects is likely to have Customer and Project logged against information in quite a number of data repositories. These fields should therefore be defined as 'Category' fields to enable all relevant information to be found by performing a search within the AbilityCenter™ - a holistic view of all client information can prove to be a very powerful and time saving tool.

The example below creates a 'Category' field called "Product", which is linked to the product category defined in the AbilityCenter™:

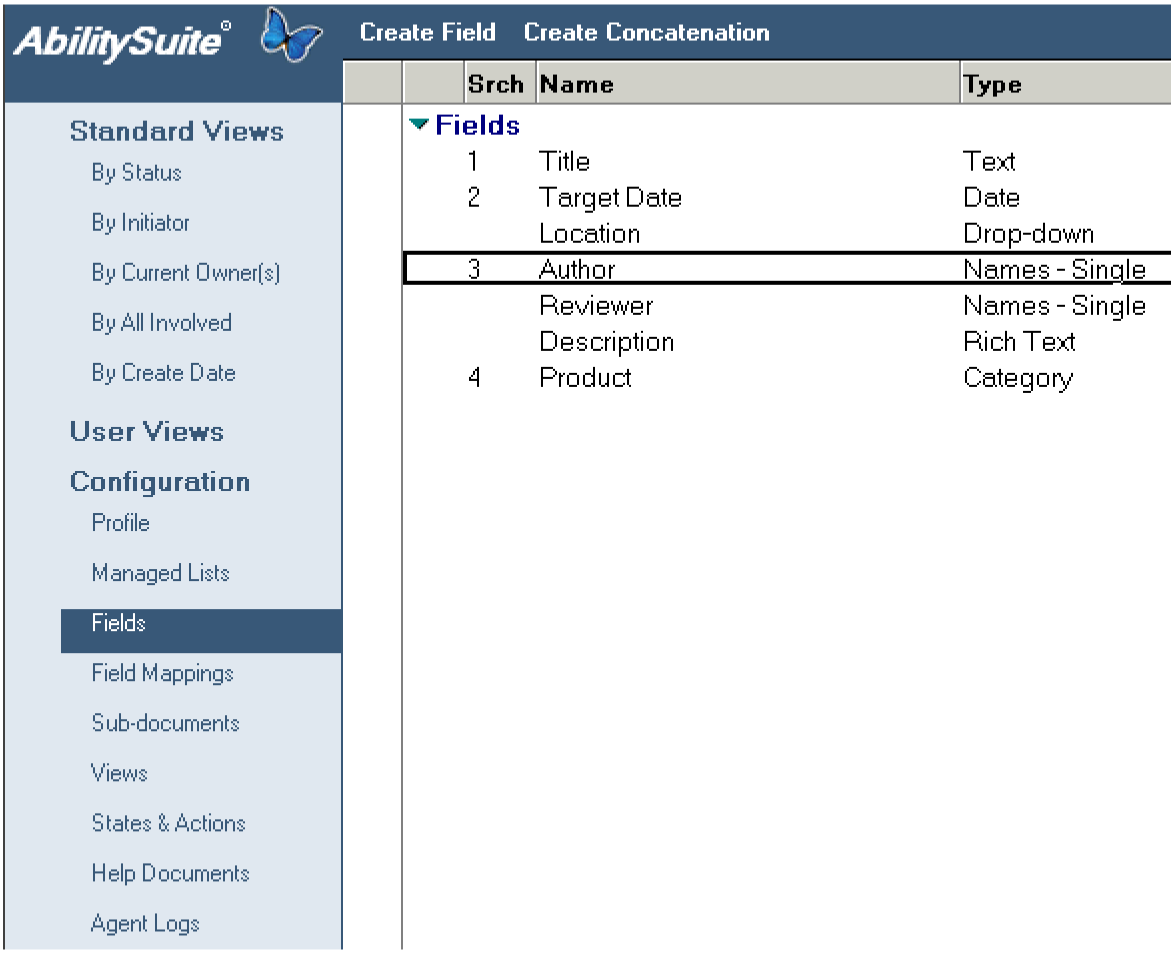


Once you have created the category field, choose **'Save'** or **'Save & Close'** to save the form. Please note that selecting **'Close'** will close the definition **without** saving any changes.

Current Field Configuration

Current Field Configuration

The current field configuration can be listed by selecting the 'Fields' option from the Configuration toolbar on the left-hand side of the screen:



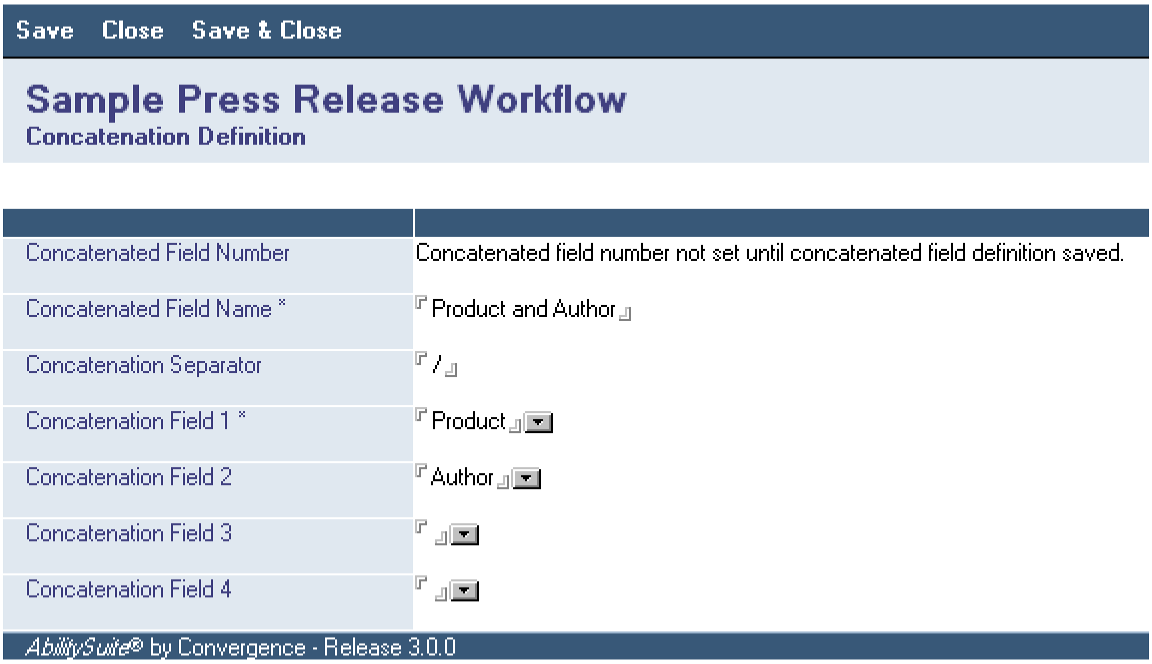
Creating Concatenated Fields

Creating Concatenated Fields

The concatenation capability allows multiple fields to be linked and appear as a virtual single field. This is extreme by two or more values.

Select the '**Fields**' option in the left-hand toolbar menu, and then click on the '**Create Concatenation**' button fror definition screen.

Enter the concatenated name of the Field and the seperator, along with the fields that are to be concatenated as sel fields that are presented include default values (e.g. creator, current owner, all involved) as well as the fields createc



Concatenated Field Number	Concatenated field number not set until concatenated field definition saved.
Concatenated Field Name *	Product and Author
Concatenation Separator	/
Concatenation Field 1 *	Product
Concatenation Field 2	Author
Concatenation Field 3	
Concatenation Field 4	

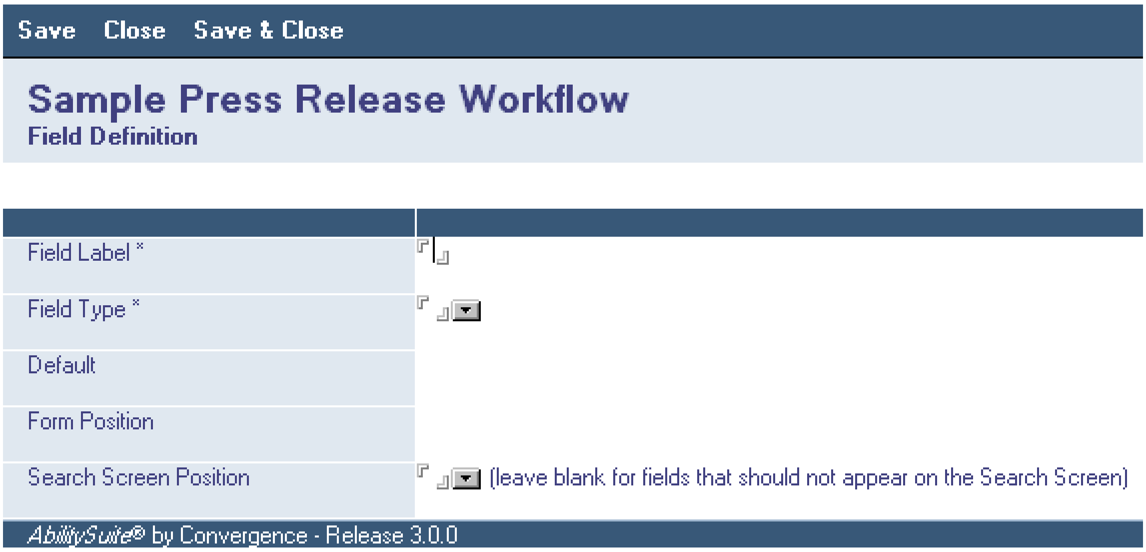
Once you have created the concatenation definition, choose '**Save**' or '**Save & Close**' to save the form. Please ı **without** saving any changes.

Defining Form Fields

Defining Form Fields

Once a form has been created, the fields to be included on the form can be defined. A single form can contain up to twenty fields. The order in which the fields are created determines the order in which they appear on the form.

Select the '**Fields**' option in the left-hand toolbar menu, and then click on the '**Create Field**' button from the toolbar at the top of the screen to display the field definition screen.



This screen initially has four fields available for completion, more will appear once the field type has been selected:

Field Label	This is the name of the field as it will appear on the form.
Field Type	This defines what type of field this will be.
Default Form Position	Where will this field appear on the form.
Search Screen Position	If you require this field to be available in the front end search engine state which position you want it to be in.

The following table lists those fields that will appear for each of the possible field types:

- Text

Default	The default value - set when a document is created.

- Date

Default	The default value - set when a document is created. This can be the current date (when the document is created), the first of the current month (when the document is created) or a set date.

- Drop-down & Multiple Selection

Options	The available options.
Default	The default value - set when a document is created.

- Names - Single & Names - Multiple

Options	The list from which the user can select an entry (Name & Address Book , Managed Lists).
Default	The default value - set when a document is created. This can be the current user (when the document is created) or a set user.

- Rich Text

No Additional Fields are displayed for this field type.

- Category

Options	The category (configured in the AbilityCenterTM) to which this field relates
Default	The default value - set when a document is created.

> **Note:**
> The Category field type is only avialable once the AbilityCenter™ details have been entered via the 'Workflow Basics' configuration screens.

Once you have created the field definition choose **'Save'** or **'Save & Close'** to save the definition. Please note that selecting **'Close'** will close the definition **without** saving any changes.

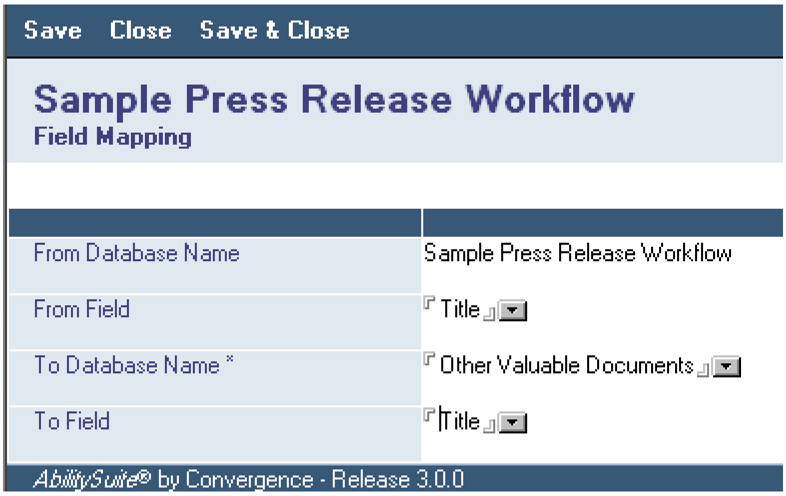
> **Note:**
> More detailed information on defining each of the field types can be found in other sections of this manual.

Defining the Field Mappings

Defining the Field Mappings

To add a Field Map, select the "**Field Mappings**" option from the left-hand configuration toolbar, and click on the "Add Field Map" button from the top toolbar.

This allows you to define the link from a field in this AdaptAbility™ application to a field in another database. For example, in this sample Press Release application, we have mapped the field "**Title**" to the "**Title**" field in a database called "Other Valuable Documents."



Once you have created the field mappings, choose **'Save'** or **'Save & Close'** to save the form. Please note that selecting **'Close'** will close the definition **without** saving any changes.

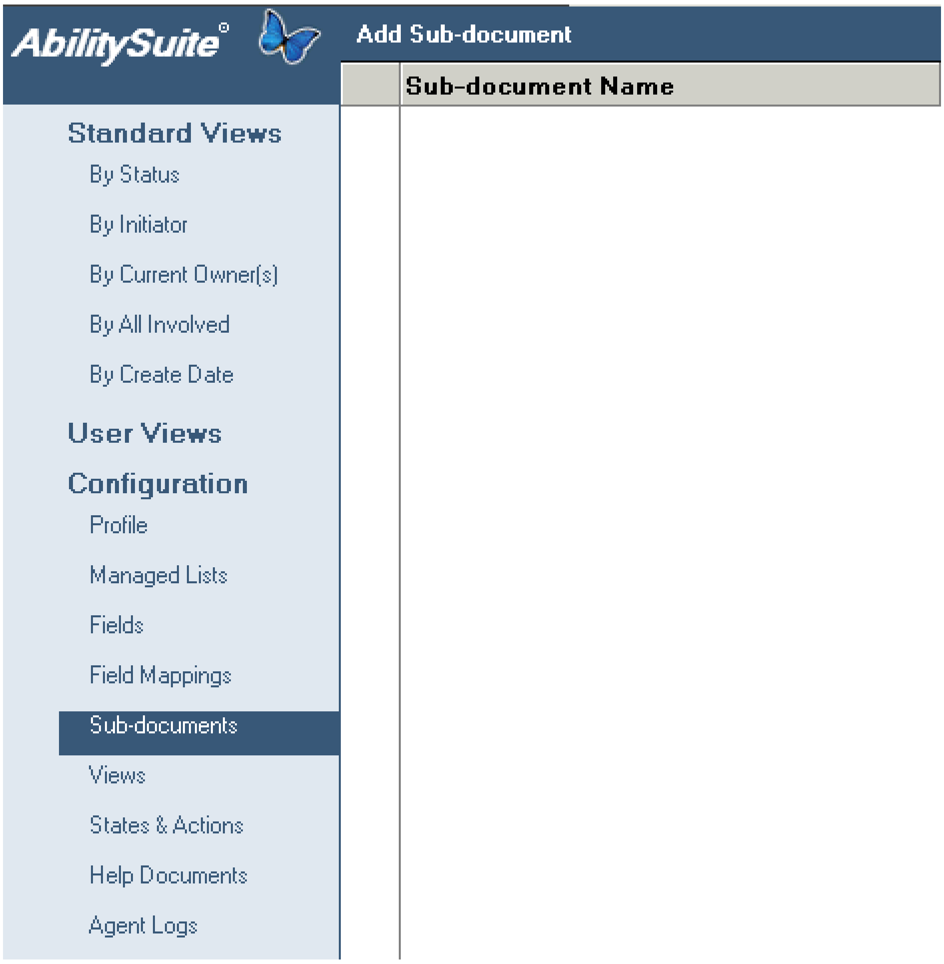
Defining Sub-Document Types

Defining Sub-Document Types

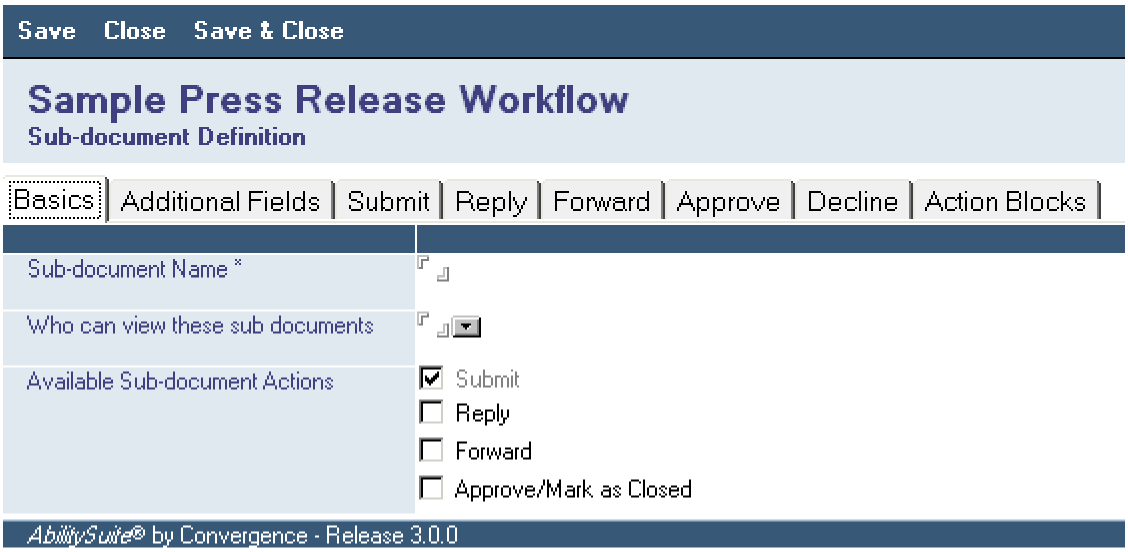
A **'Sub-Document'** is created when there is additional information that needs to be logged against the main form or when there are queries against the main form.

There are a number of different **'Sub-document types'** that can be created in "**AdaptAbility™".**

To create a sub-document, select the **'Sub-documents'** option from the left-hand configuration toolbar and choose **'Add Sub-document'** from the top toolbar.



This will present you with a number of options as follows:

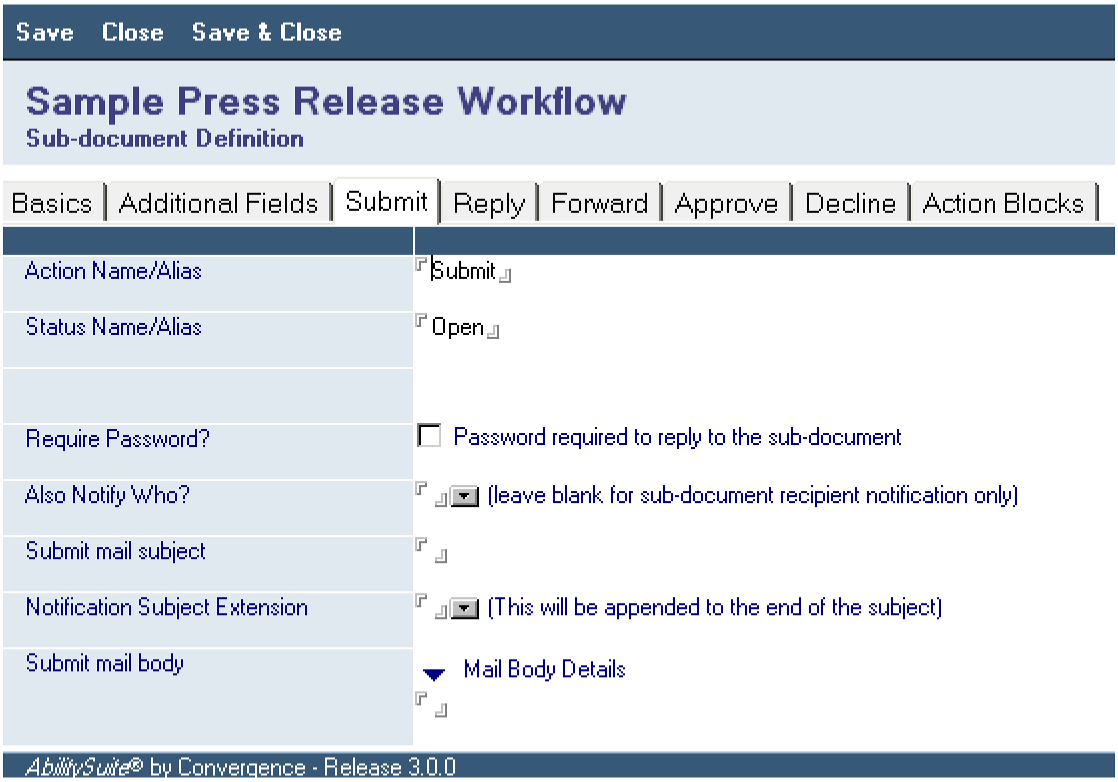


Basics	This is the main configuration screen allowing you to provide the name of the sub-document; those who can view the sub-document and the actions available to the sub-document. These actions, once selected, expand the basic configuration window with additional choices as well as activating the

	configuration fields for each respective tab (reply, forward, approve).
Additional Fields	This tab allows you to enter up to three additional fields on the sub-document. See Fig 1 below.
Submit	This tab allows you to state what should occur when this action is chosen for the sub-document, including who should be notified and the text of the email notification message. If a password is required to be entered on this action, it can be checked from this configuration tab. See Fig 2 below.
Reply	This tab provides similar options as with the submit tab including who can have access to this action, if the check box located on the basic tab is checked. See Fig 3 below.
Forward	This tab provides similar options as with the reply tab, if the check box located on the basic tab is checked. See Fig 4 below.
Approve	This tab provides similar options as with the reply tab as well as allowing the option for an over-ride to the action if requried, if the check box located on the basic tab is checked. See Fig 5 below.
Decline	This tab provides similar options as with the approve tab, if the check box located on the basic tab is checked. See Fig 6 below.
Action Blocks	This tab allows certain actions to be blocked , if the check box located on the basic tab is checked. It also allows the selection of which status' that clear those blocks. See Fig 7 below.

(Fig 1 - Additional Fields)

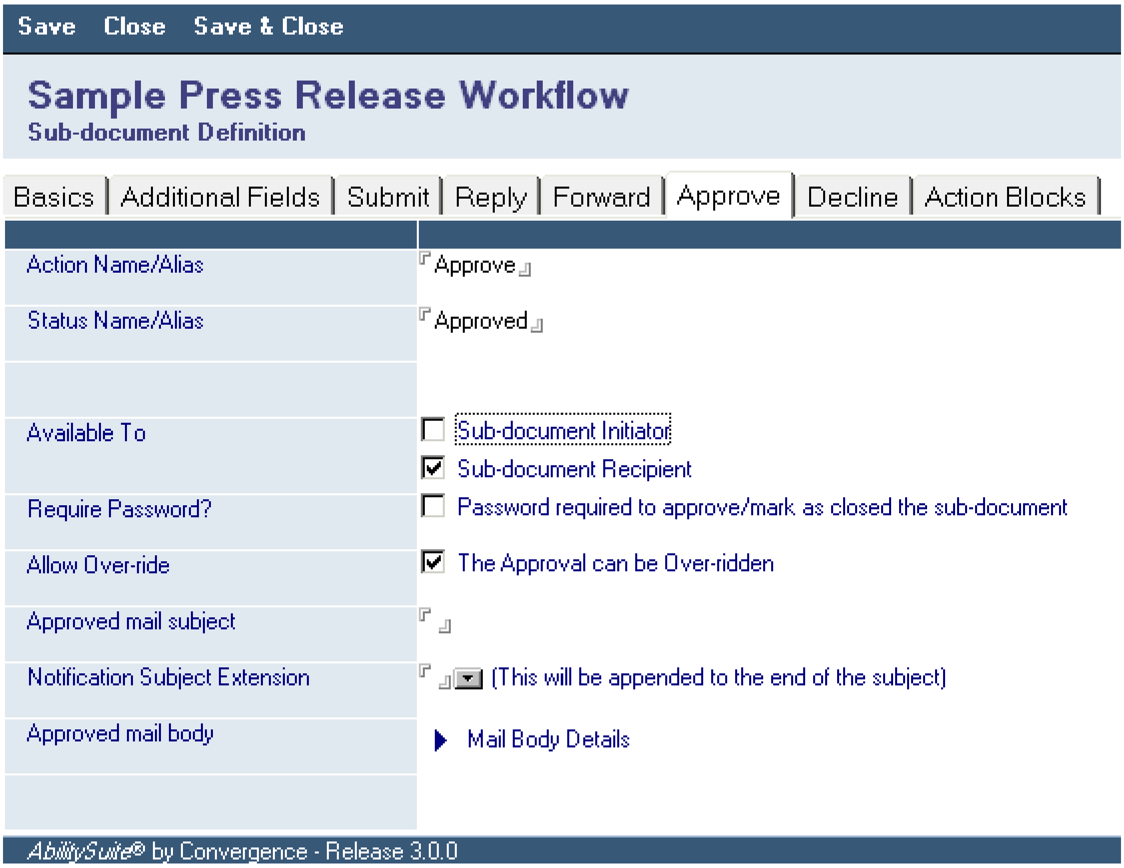
(Fig 2 - Submit)



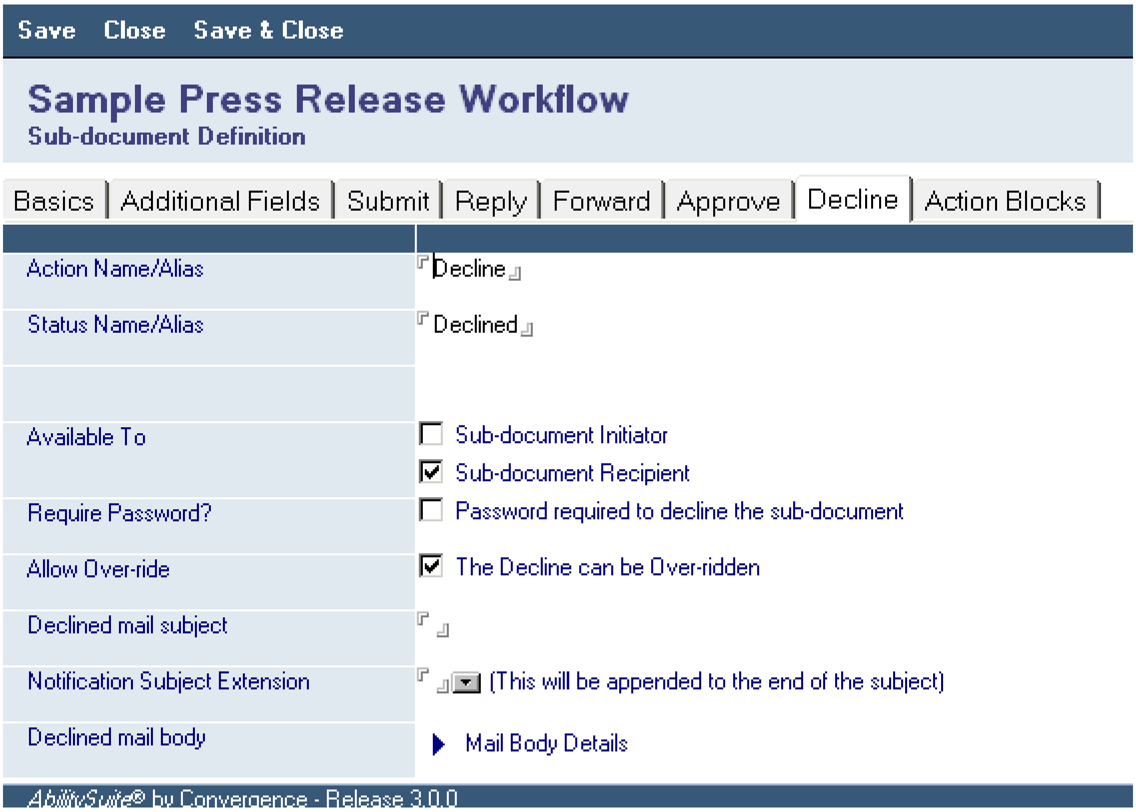
(Fig 3 - Reply)

(Fig 4 - Forward)

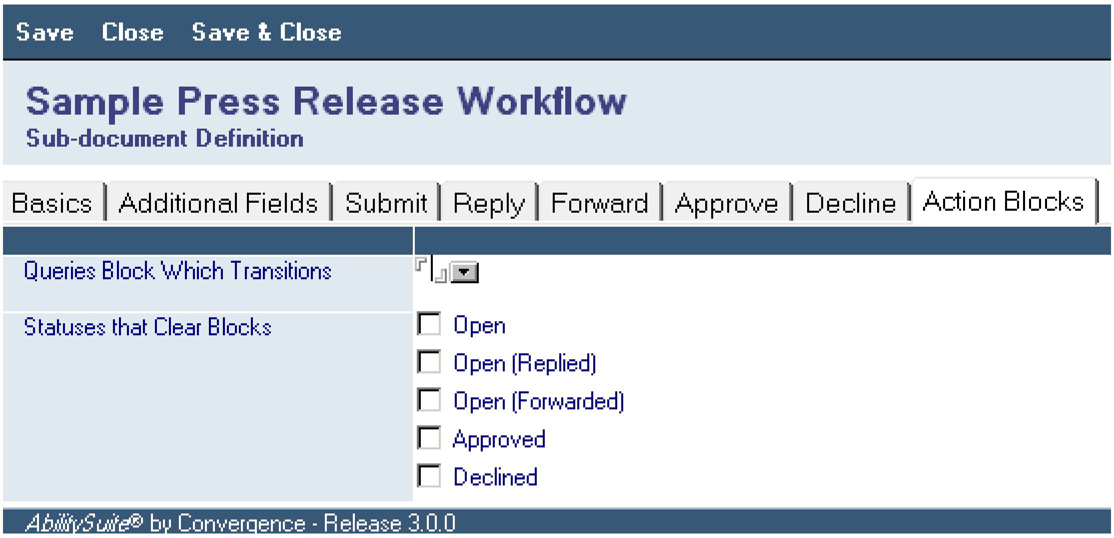
(Fig 5 - Approve)



(Fig 6 - Decline)



(Fig 7 - Action Blocks)



Defining a Standard View

Defining a Standard View

To define a standard view, select the **'Views'** option from the configuration toolbar located on the left-hand side of your screen and then click on the **'Create View Definition'** from the top toolbar.

The following screen will be displayed:

This standard view definition has the following fields:

View Number	This is an automatic field and will not require completing.
View Name	This is where you name the view as it will appear to users of the process when they want to find information.
Level 1 Category	This is the first drill down the user will see when they choose this view.
Level 2 Category	This is the second level of information.
Level 3 Category	This is the third level of information.
View Date Column	This is the date field that will be displayed.
View Contents	This is where the user will click on to see the content.

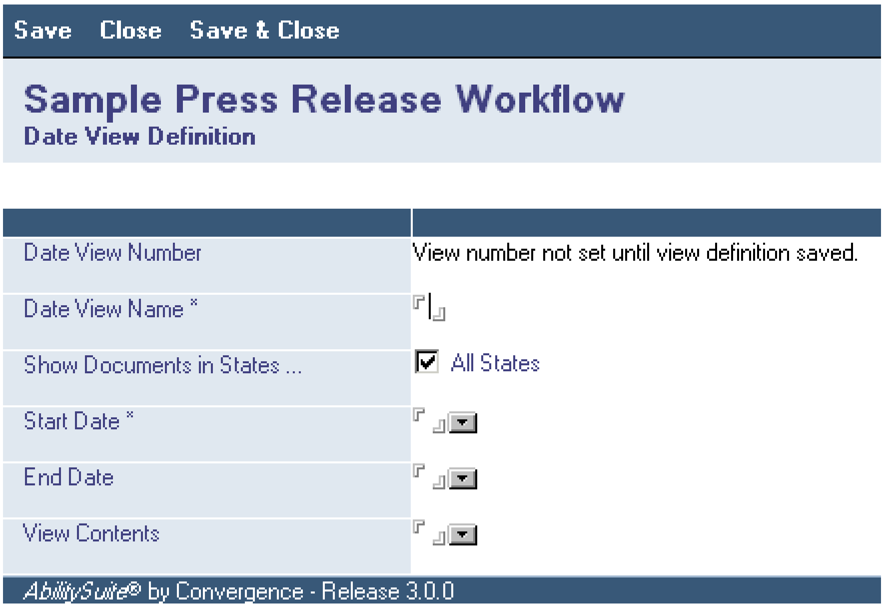
As you create each **'New View Definition'** click on **'Save & Close'** and you will see the new views you have created.

Defining the Date View

Defining the Date View

To define the date view, select the **'Views'** option from the configuration toolbar on the left-hand side of your screen and then click on the **'Create Date View Definition'** from the top toolbar.

The following screen will be displayed:



This date view definition has the following fields:

Date View Number	This is an automatic field and will not require completing.
Date View Name	This is where you name the view as it will appear to users of the process when they want to find information.
Show Documents in States...	Check to display all documents in this view.
Start Date	The date field which is to be used as the start date for the document entry in the calendar.
End Date	The date field which is to be used as the start date for the document entry in the calendar.
View Contents	This is where the user will click on to see the content.

Defining Views

Defining Views

Each AdaptAbility™ can have up to six views defined. A view is a means to display information in a way that makes it easy for users to find the document that they are looking for. Up to five standard views and a single date view can be created

To define a view, select the **'Views'** option from the configuration toolbar on the left-hand side of your screen, then click on either **'Create View Definition'** or **'Create Date View Definition'**.

> **Note:**
> The definition of standard and dates views is covered in more detail in other sections of this manual.

By clicking on the main **'Views'** button you will be able to see the **'Views'** as they will look in the live application.

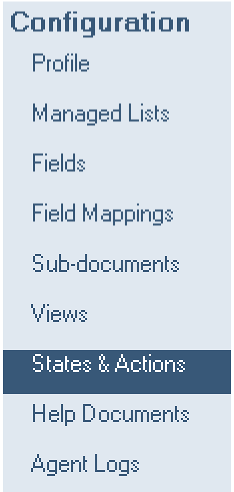
Defining States

Now that the **'Form, Fields & Views'** are configured the next step is to begin the process of building the **'Workflow'** around the process.

It is useful to sketch out the process in a **'State Flow Diagram'** as this will help you to understand the process including the various **'States & Transitions'** involved. Some examples of **'State Flow Diagrams'** are included in this training guide.

To begin the process of building the workflow go to the **'States & Actions'** option from the **'Configuration'** toolbar on the left-hand side of your screen as shown in Fig 1 below.

(Fig 1)



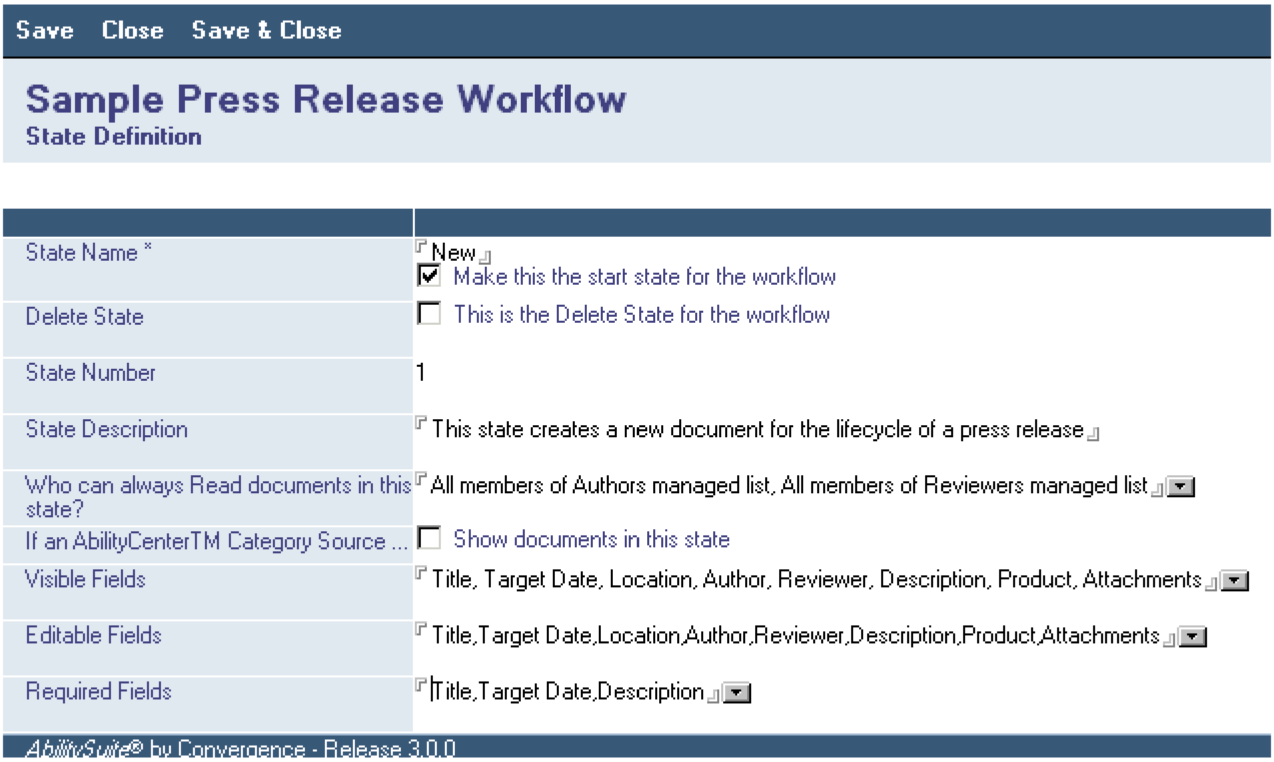
The process we are creating in this example will have three states.

- **New**
- **Press Release For Approval**
- **Approved Press Release**

To create the first **'State'** click on **'Create State'.**

This will display a form for completion which we will configure for the "new" state. (See Fig 2).

(Fig 2)



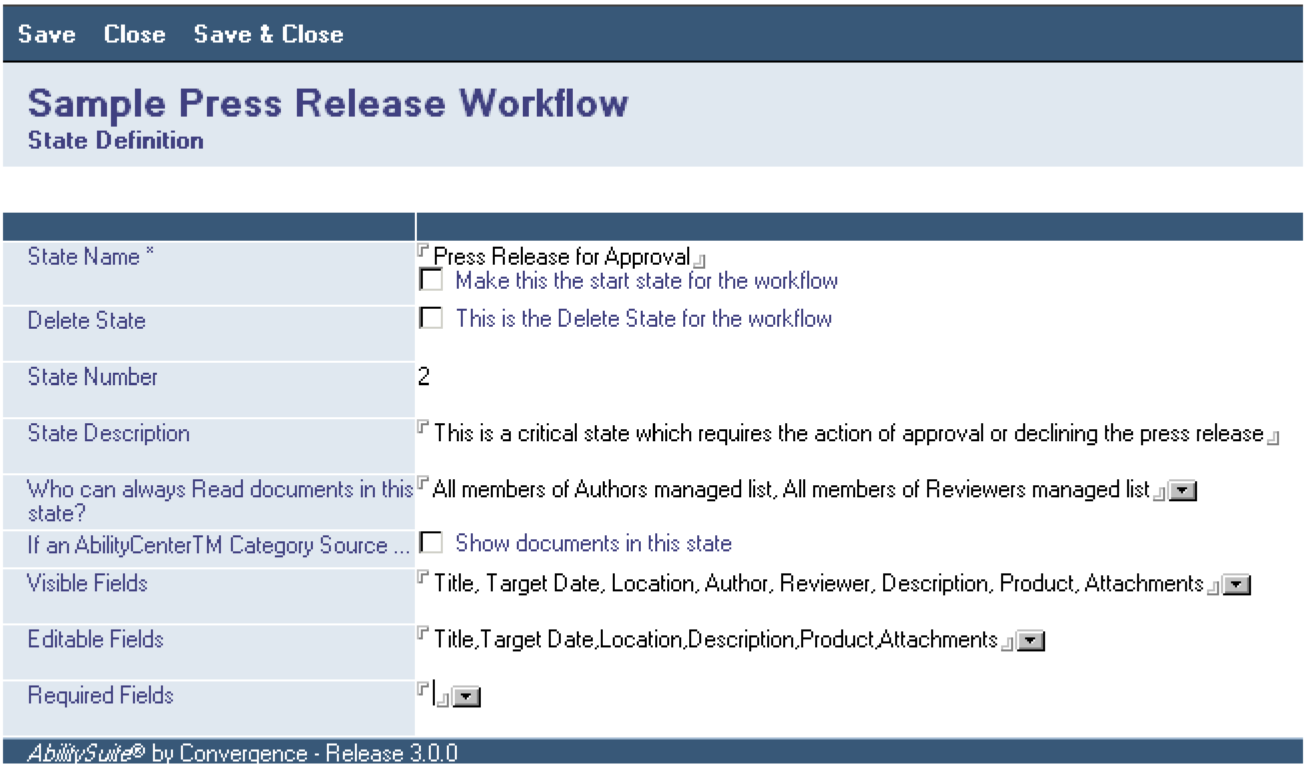
The fields to complete are as follows.

State Name	The name of the state.

Make This The Start State for the Workflow	If this is the beginning of the process check this box.
Deleted State	In later states you may want to delete documents
State Number	This is an automatically generated number for the state.
State Description	Brief description of the state.
Who Can Always Read Documents in this State	For applications with some security you can name the people who are allowed to see documents in this state.
AbilityCenter™ Category Source	This is checked if this state will be used as a searchable category from AbilityCenter™.
Visible Fields	In some applications you may want information only available in this state or in some instances only have fields become available as they are required.
Editable Fields	Fields that can be edited in this state.
Required Fields	These fields will be marked as mandatory and must be populated before the document can be saved in this state.

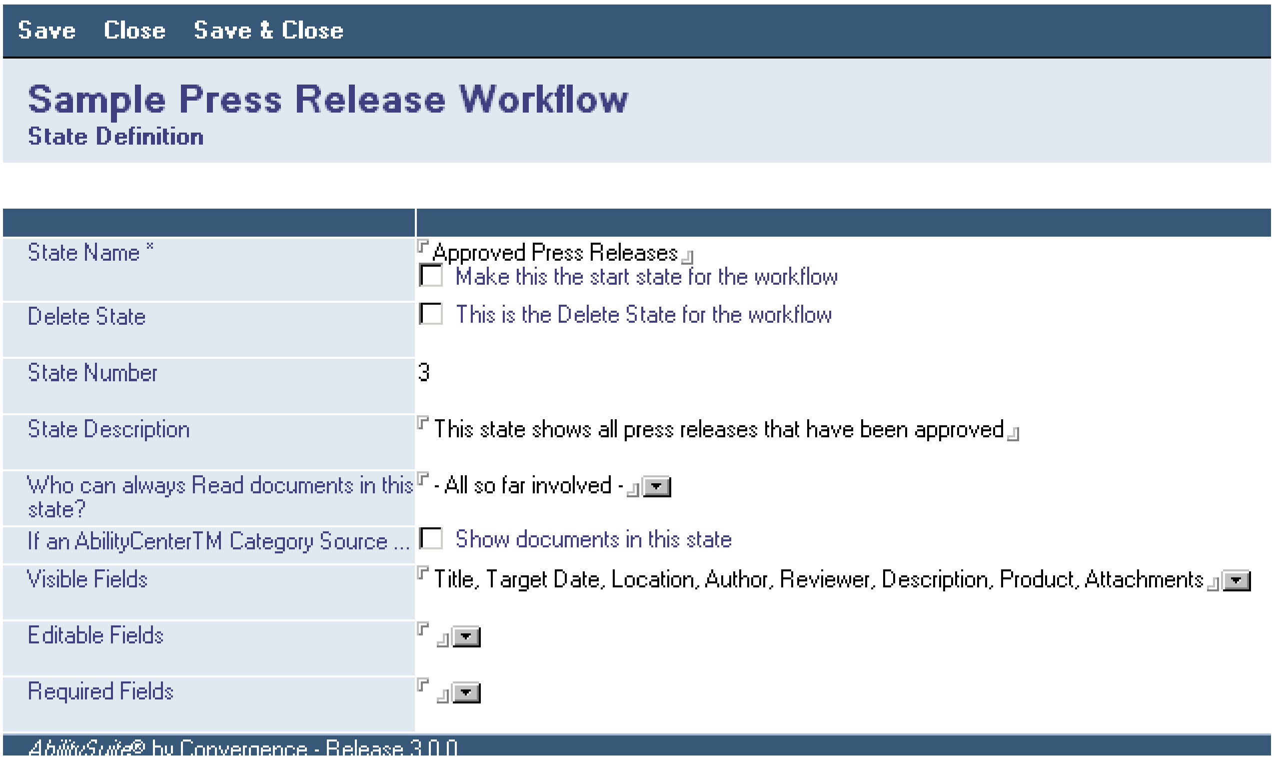
The second **'State'** we will create in this example is for press releases that are awaiting approval. (See Fig 3)

(Fig 3)



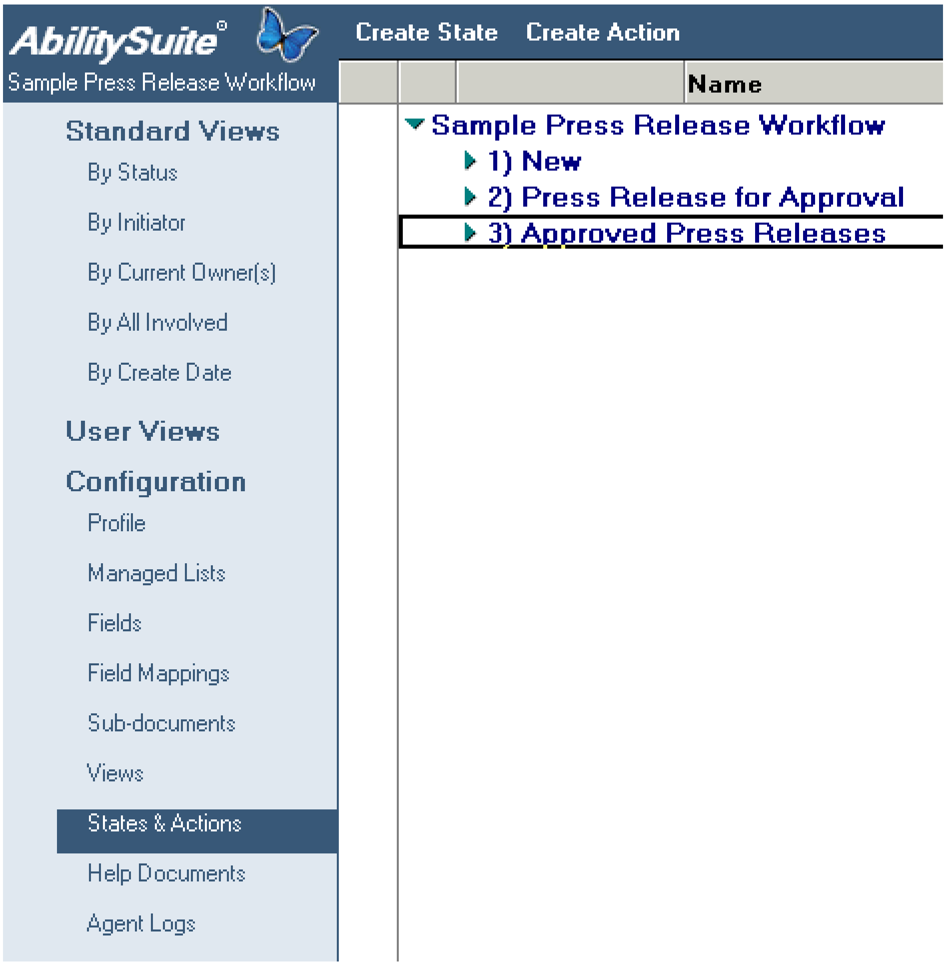
The final state we will create is for approved press releases. (See Fig 4).

(Fig 4)



By clicking on '**Save & Close**' we will see the '**States**' that we have created. (See Fig 5).

(Fig 5)



Action Basics

In the **'Action Basics'** screen we will define the basic attributes of the action we are creating. See Fig 1.

Name	This is the name of the **'Action'** as it will appear in the **'Actions'** dropdown menu.
Description	A basic description of what this **'Action'** will do.
Start State	The state that this **'Action'** will be available in. As this is the beginning of the process the State that this **'Action'** will begin in will be the **'New'** state that was created earlier.
Required Fields	These are fields that must be completed.

The next step is to check the appropriate boxes for the **'Action Type Profile'** as shown in the **'Action Basics'** screen in Fig 1.

The Action is available	This checkbox allows the process to

to DesktopAbility™	be accessed when saving a document from an Office Productivity Tool (e.g. MS Word) when the "save" command is executed.
The Action is Automatic	An automatic action is not driven by a user selecting the action from the menu. Instead an automatic action takes place on a document automatically after a designated date.
The Action is Mail-Activated	This checkbox makes the process available to MailAbility™ which allows a user to email into the process directly from their Notes mail client.
The Action Generates a Sub-document	This checkbox indicates that selecting the Action will allow the user to fill out a Sub-document.
The Action Generates a Link	This checkbox will only be available if your AdaptAbility™ is associated with an AbilityCenter™. Linking **'Actions'** allows you to associate the current document with another document in another AdaptAbility™ that is associated with the same AbilityCenter™.
The Action is A Transition (Changes the State of the Document)	If the **'Action'** will move the form from one state to another this box must be checked. In this example a **'New Cap-ex for Approval'** action will take the form from the **'New'** State to the **'Cap-ex for Approval'** state.
The Action Generates a New Version	This checkbox is only available if the Action is a transition. If an **'Action'** generates a new version then the document is preserved in its current state and all future modifications take place on a new copy of the document.
The Action Performs an Attachment Conversion	This checkbox allows an agent to run as a completion activity such as converting an MS Word document to PDF.

(Fig 1)

Note

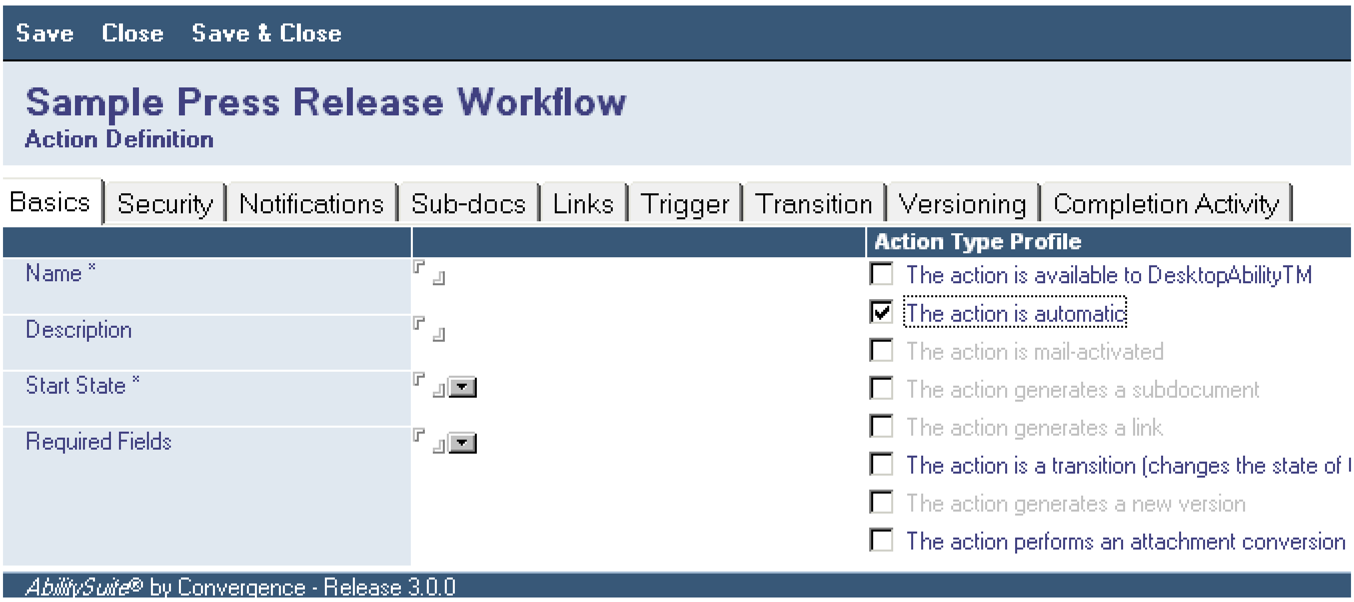
Some options in the **'Action Type Profile'** preclude other options. Following are the combinations and preclusions.

1. An **'Automatic Action'** cannot generate a **'Sub-document'**, a **'Link'** or a **'New Version**.
2. If an **'Action'** generates a **'Sub-document'** it cannot generate a **'Link'** or a **'New Version'.**
3. If an **'Action'** generates a **'Link'** it cannot generate a **'Sub-document'** or a **'New Version'.**
4. If an **'Action'** generates a **'New Version'** it cannot generate a Link or a **'Sub-document'.**
5. An **'Action'** can only generate a **'New Version'** if it is a **'Transition'.**
6. An **'Action'** can only generate a Link if the AdaptAbility™ is associated with an AbilityCenter™.

Automatic Actions

To create an **'Automatic Action'** check **'The action is automatic'** checkbox in the **'Basics'** tab. See Fig 1.

(Fig 1)



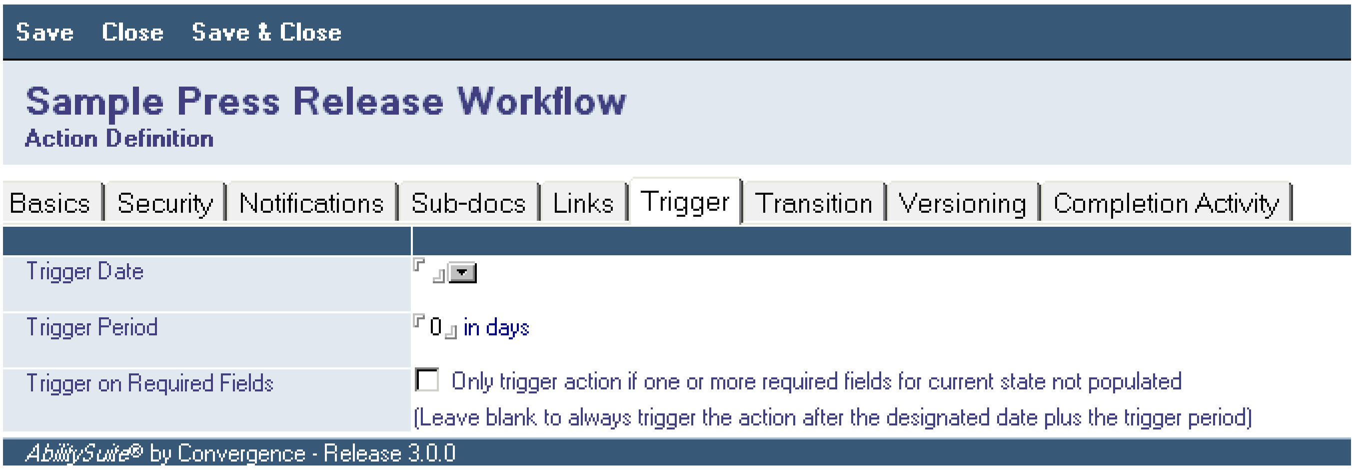
Then highlight the **'Trigger'**, tab as shown in Fig 2.

There are three fields to complete.

Trigger Date	This is the date that controls when the Automatic Action takes place. The options are - • Date created • Date entered current state

	• *Any Date Field that you have configured on Form*
Trigger Period	The number of days before or after the trigger date that the Automatic Action will take place. This number can be positive. i.e. 7 to have the Action take place one week after the trigger date or - 7 to have the Action take place one week prior to the trigger date. This functionality is useful for reminders and escalations on Actions.
Trigger on Required Fields	Allows a trigger to be actioned when a field is not populated

(Fig 2)



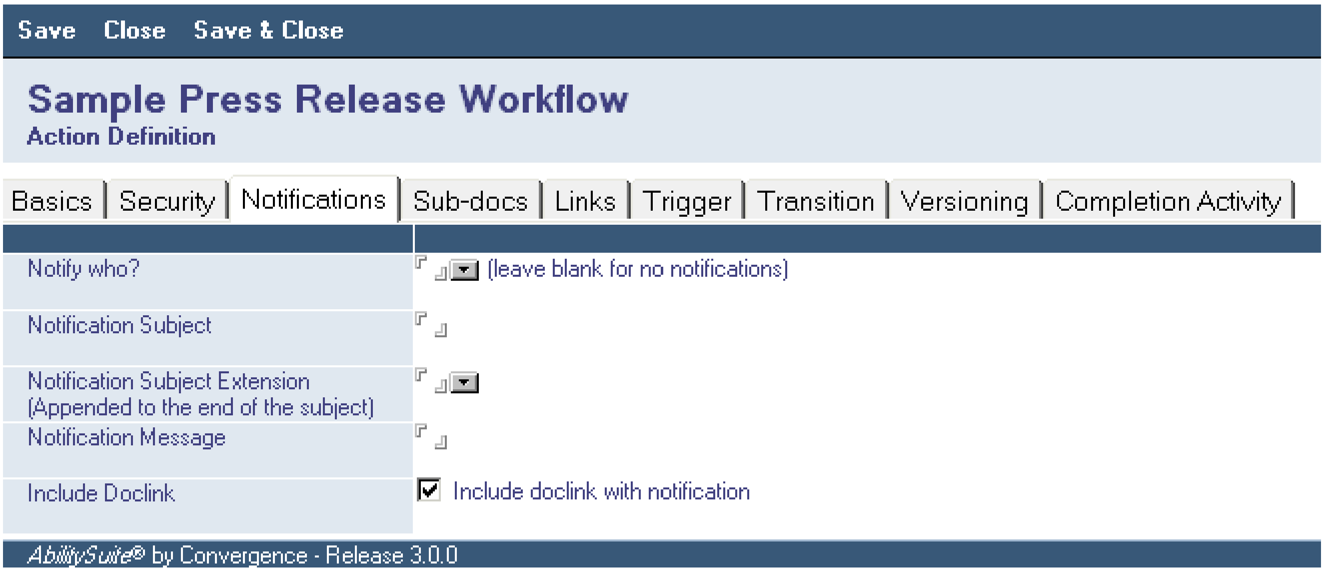
Action Notifications

When an action takes place, it can generate an email to individuals involved in the process. The details of this email is configured on the '**Notifications**' tab. See Fig 1.

Notify Who?	From the normal document roles (Initiator, Current Owner, All Involved), Managed Lists or from the Names Fields select the individuals who need to be notified when this action takes place.
Notification Subject	This is the text that will appear in the subject field of the email.
Notification Subject Extension	You may select one field, the value of which will appear at the end of the Notification Subject.
Notification Message	This is the text that will appear in the body of the notification email.
Include Doc Link	By checking this box a

	Document Link to the main form will be included in the body of the email notification message.

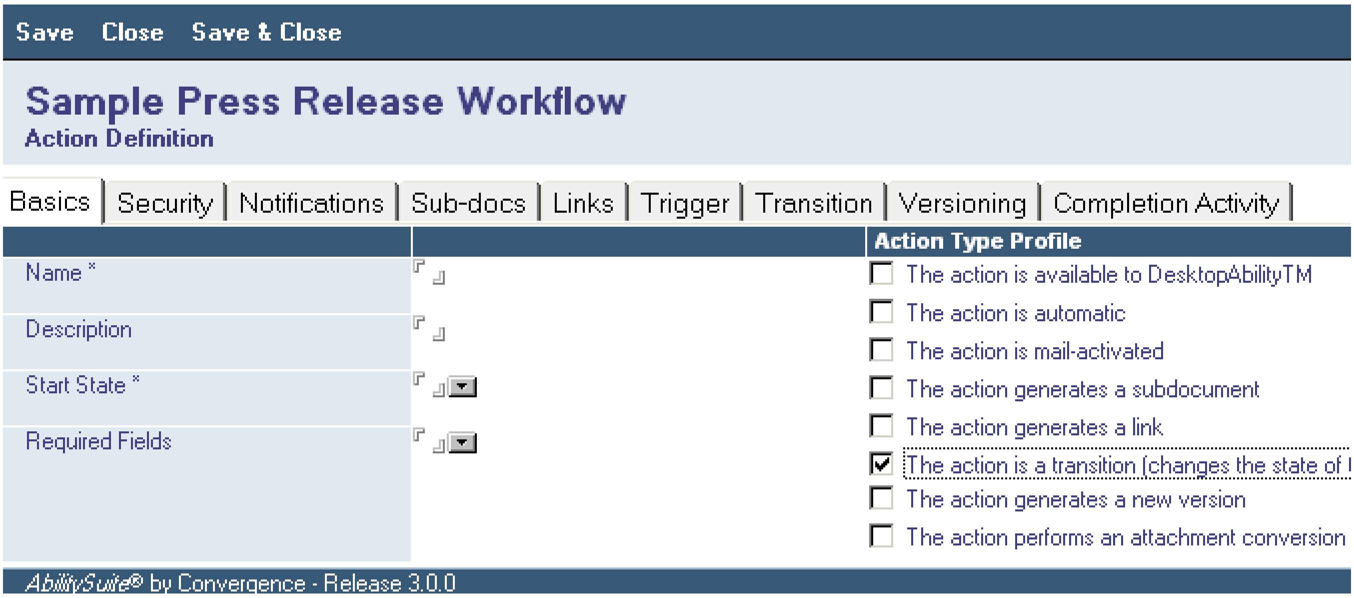
(Fig 1)



Transition Actions

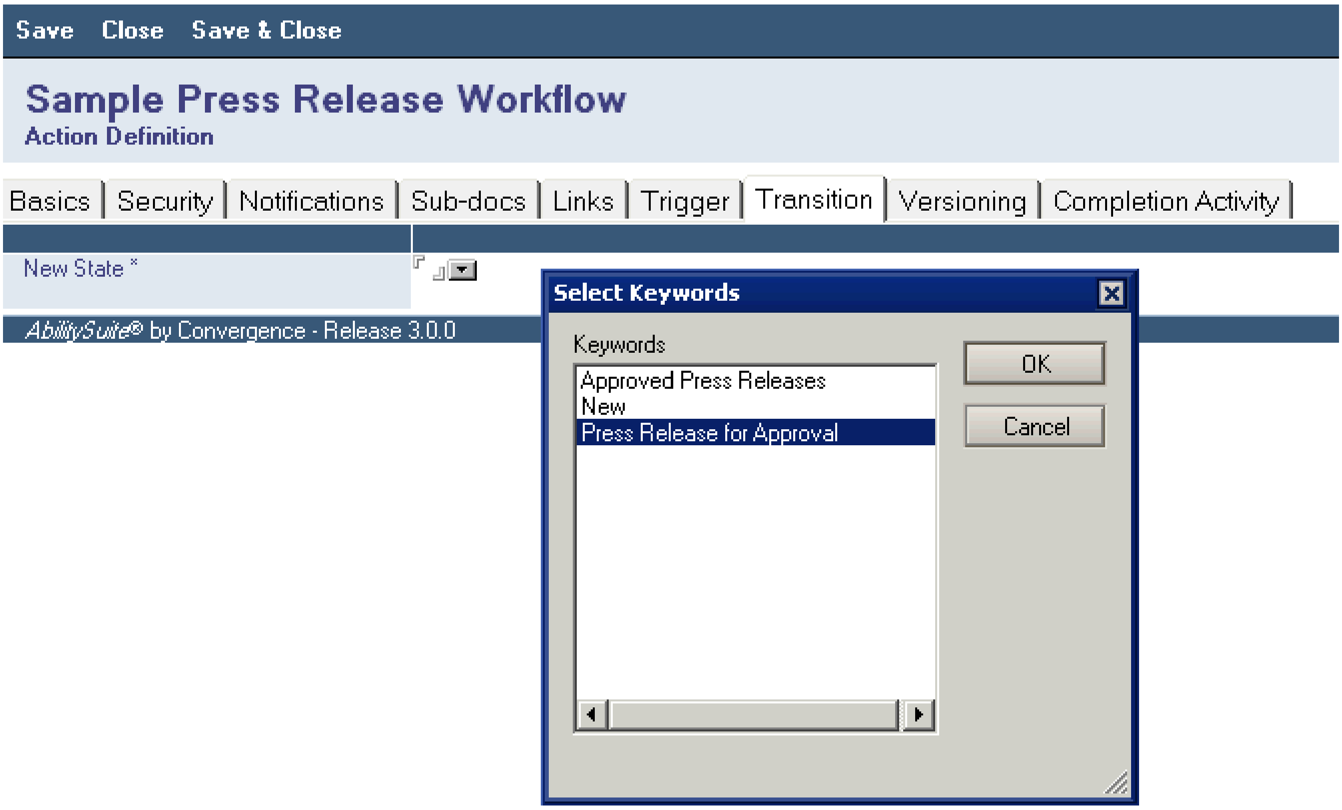
When an action is going to take a document from one **'State'** to another the **'Transition'** box should be checked in the **'Action Type Profile'** options. The **'Start State'** field on the Basics Tab should be completed. See Fig 1.

(Fig 1)



Now when we highlight the **'Transition'** tab in the **'Action Definitions'** screen we can select the **'State'** that the document will move to when the Action is completed by a user. See Fig 2.

(Fig 2)



Action Sub-documents

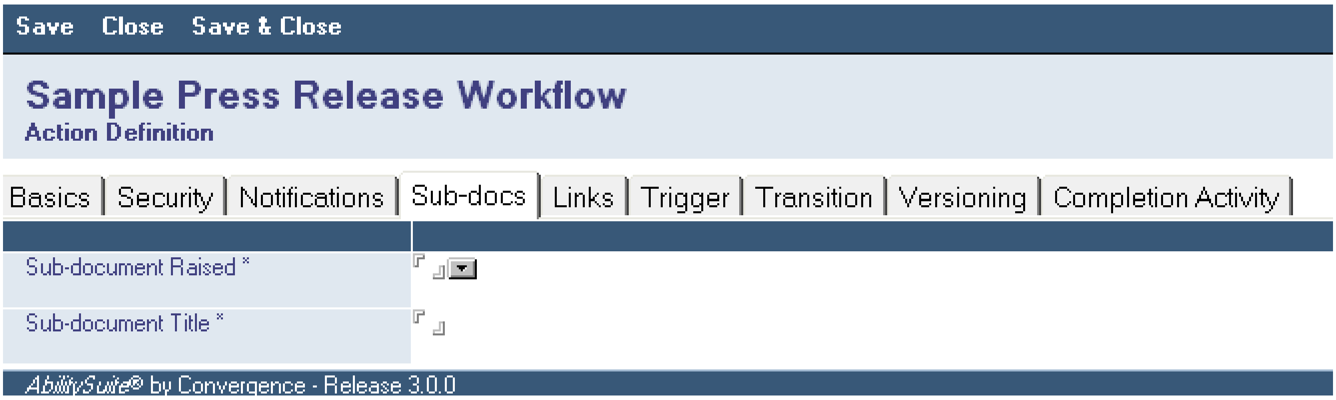
In some cases you may want a Sub-document to be created for an Action. For example, if an Authoriser is submitting a **'Query'** against a Press Release. To do this, check the **'This action generates a sub-document'** box in the **'Action Type Profile'** list. See Fig 1.

(Fig 1)

Now highlight the **'Sub-document'** tab in the **'Action Definition'** screen. You can now fill out the details of the **'Sub-document'** and notification messages that will be associated with the **'Action'** that is been created.See Fig 2.

Sub-document Raised	Any Sub-documents that have been created are available to select from.
Sub-document Title	Type in text that you want to appear as the title of this Sub-document.

(Fig 2)

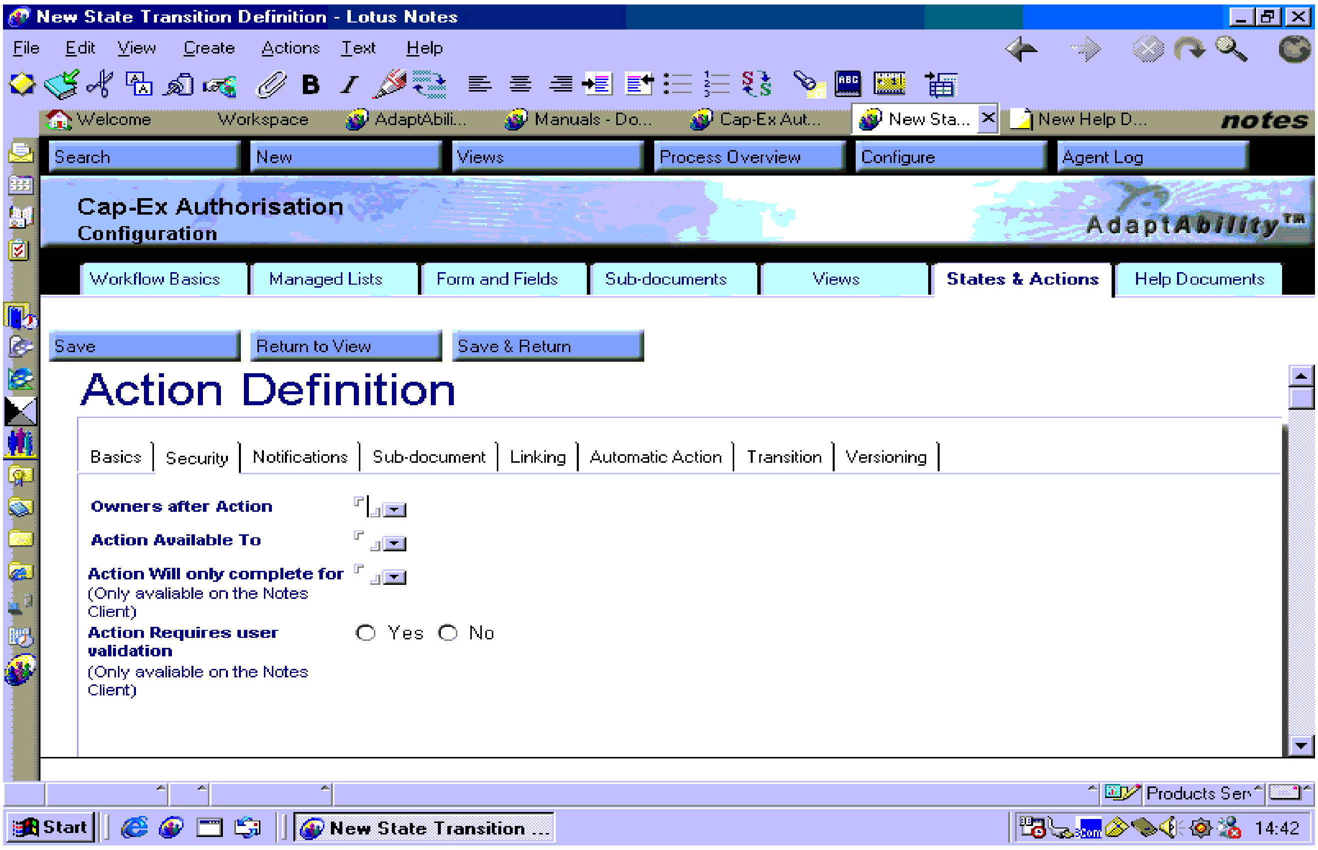


Action Security

Most Actions will require some security. To set the **'Security'** for an Action highlight the **'Security'** tab in the **'Action Definition'** screen and complete the fields available. See Fig 1.

Owners After Action	This will be the owner of the document after the action has been completed. For example if the action is submitted for approval then the new owner might be the person named in the **'Approver Field'**.
Action Available To	These are the **'Managed Lists'** that define the people who can see this action.
Action Will Only Complete For	Sometimes an **'Action'** can be available to people but only a nominated person (based on a field value) can actually perform the Action for a particular document. This is where you choose that field.
Action Requires User Validation	If **'Yes'** is selected then the user will be required to enter their password before the action can complete.

(Fig 1)



Action Linking

If your AdaptAbility™ is associated with an AbilityCenter™, then it is possible to define Actions that create links to documents in other AdaptAbility™ applications. You may either link to an existing document in another database or create a new document in another database. To set up a link, check the box labelled '**This Action Generates a Link**' on the '**Basics**' tab. See Fig 1.

(Fig 1)

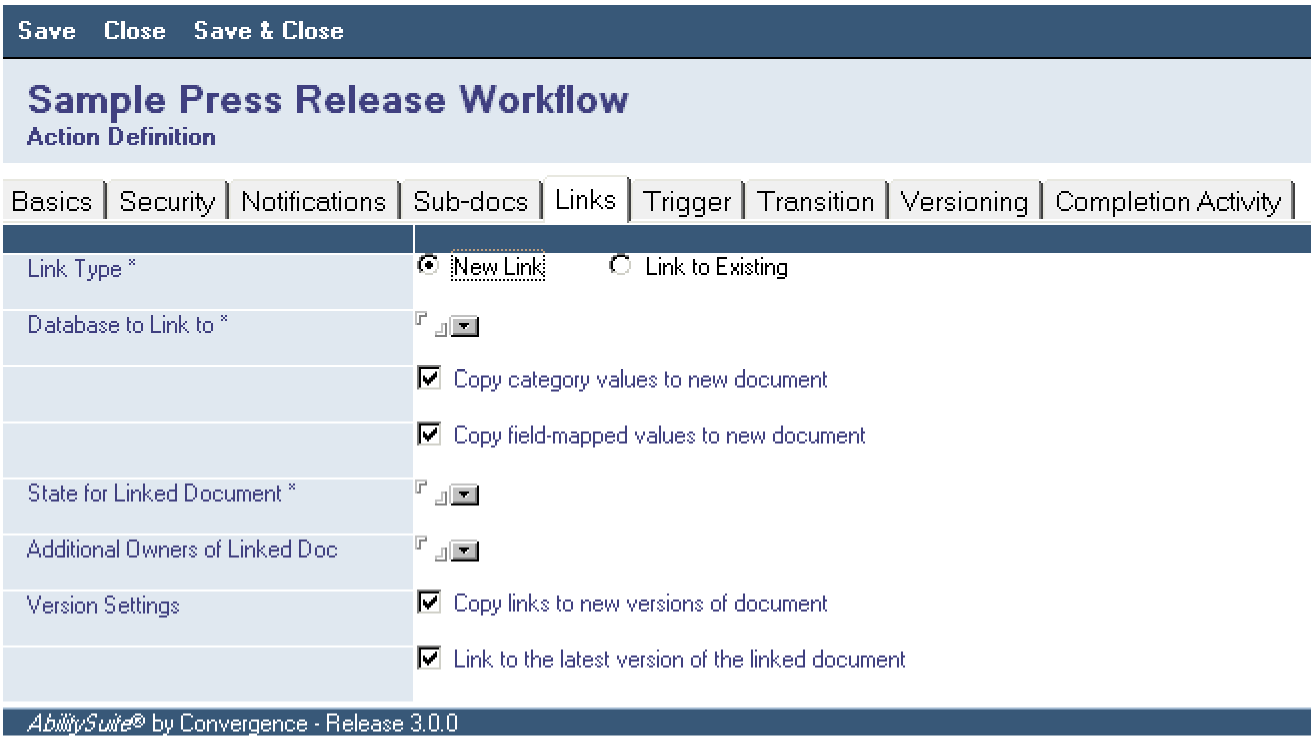
Next, highlight the **'Links'** tab in the **'Action Definition'** screen.

This will provide the following options that need to be completed. See Fig 2.

Link Type	You can either **'Link to an Existing'** document or create a **'New Link'** to a document.
Database To Link To	This is where you select the other AdaptAbilityTM database that you want to create a link to.
State For Linked Document	This field will only be visible if the link type is **'New Link'**. The **'State For Linked Document'** option allows you to choose the **'State'** the new document should go into.
Additional Owners of Linked Document	This field will only be visible if the link type is **'New Link'**. The **'Managed List'** who should be assigned ownership of the new document.
Copy Links to New Versions of Documents	Tick this box to ensure that links are carried over if a new version of the document is created.
Link to the Latest Version of The Linked Document	Tick this box if you want links to be updated to the latest

	version in the case that the original document is updated or revised.

(Fig 2)

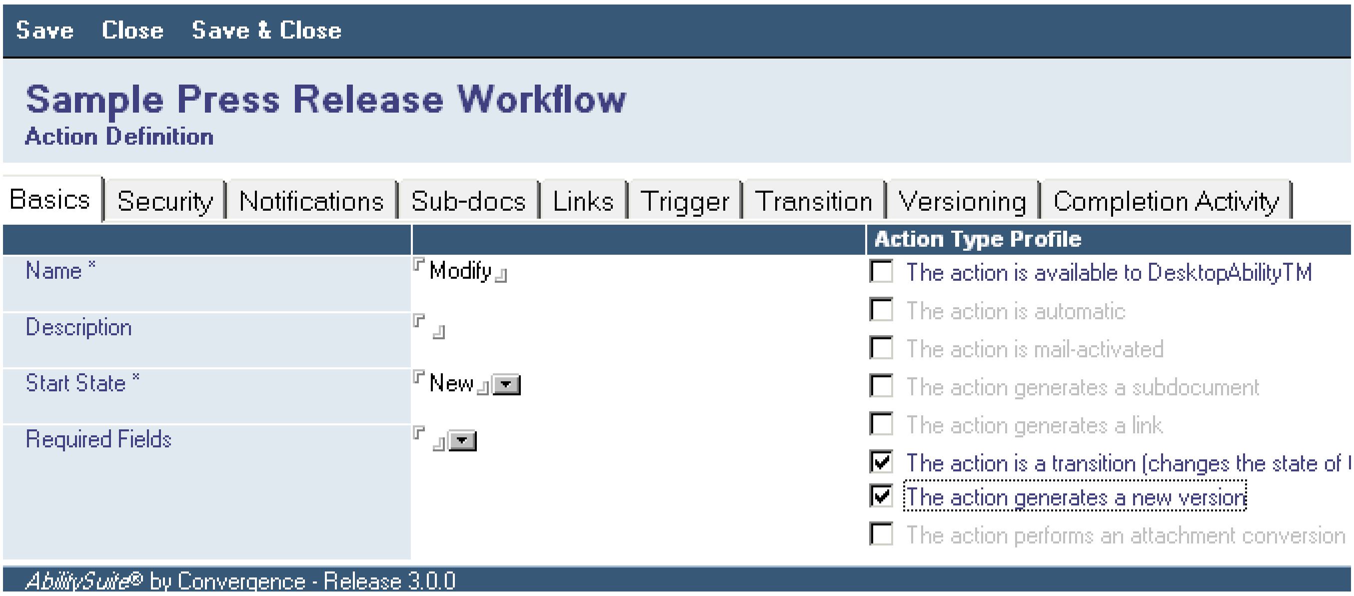


Action Versioning

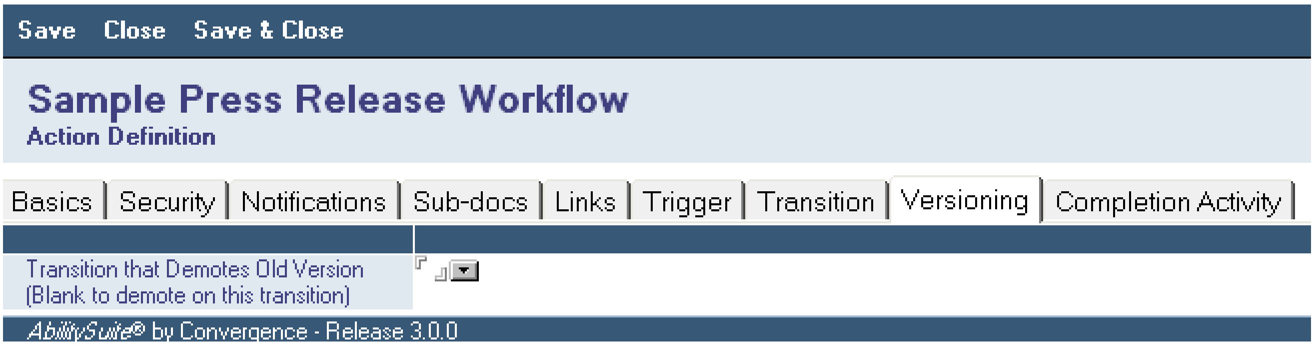
It is possible to create actions that generate a new version of the document while preserving the original version. For example, if a document is in a published state but requires changes, the changes will take place without affecting the published version. Once the new version is authorised for publication the old version will be replaced with the new version. The old version will still be available as a sub-document of the new version. This old version might be needed for auditing purposes or for referral at a later point if required.

To create actions that generate a new version of a document, ensure the checkboxes labelled ' **The Action is a Transition'** and **' The Action Generates a New Version'** in the **'Basics'** tab. See Fig 1.

(Fig 1)



Now highlight the **'Versioning'** tab. This gives us the option to choose which action will cause the old version to become a Sub-document of the new version by selecting from the **'Transition That Demotes Old Version'** field. If no **'Transition'** is selected then the old version will become a Sub-document of the new version immediately.

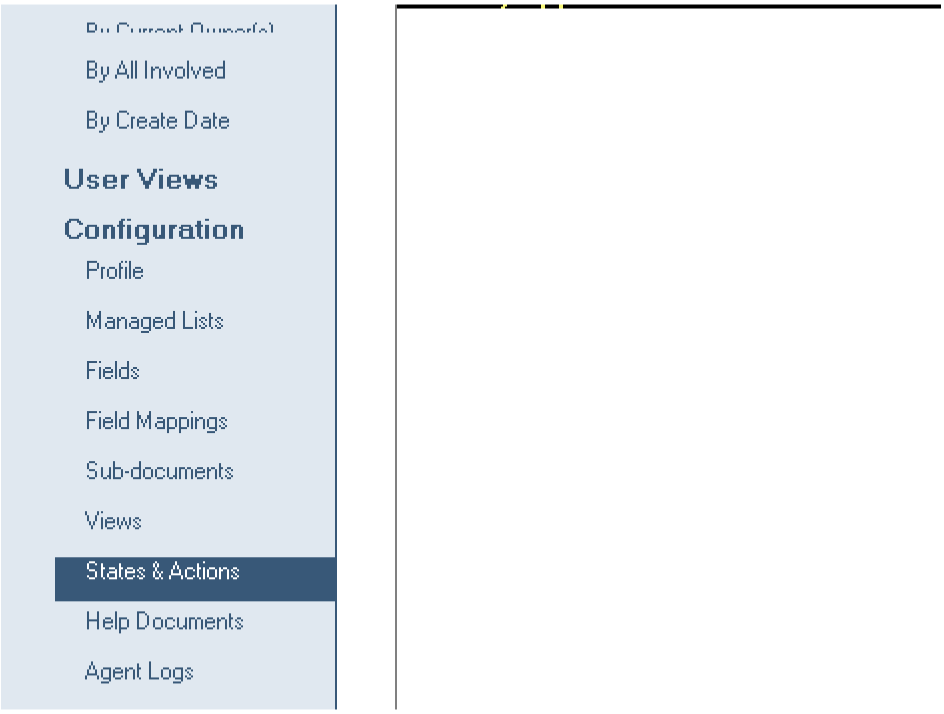


Defining Actions

Once we have defined the various **'States'** of the workflow process we can start to build the actions that will define the workflow around the **'States'.**

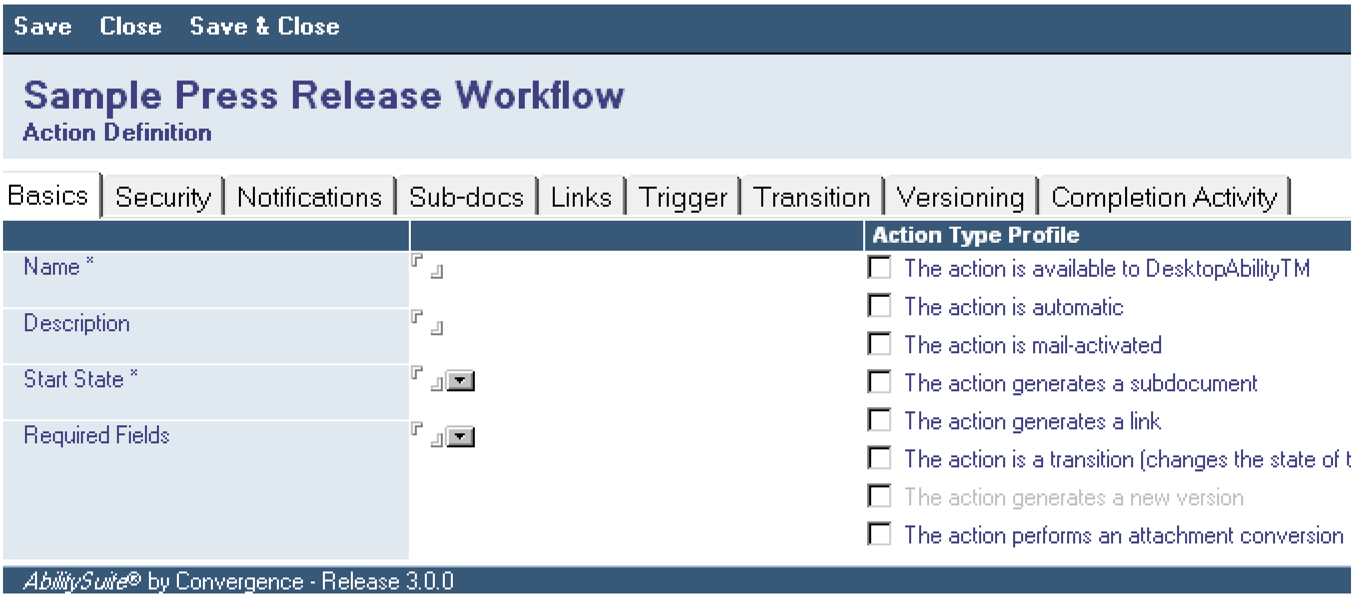
To begin this process go to the **'States & Actions'** option from the configuration toolbar on the left-hand side of your screen. You will see the States that were created earlier. Click on **'Create Action'**. See Fig 1.

(Fig 1)



When you have clicked on the **'Create Action'** button, the screen as shown in Fig 2 will appear.

(Fig 2)

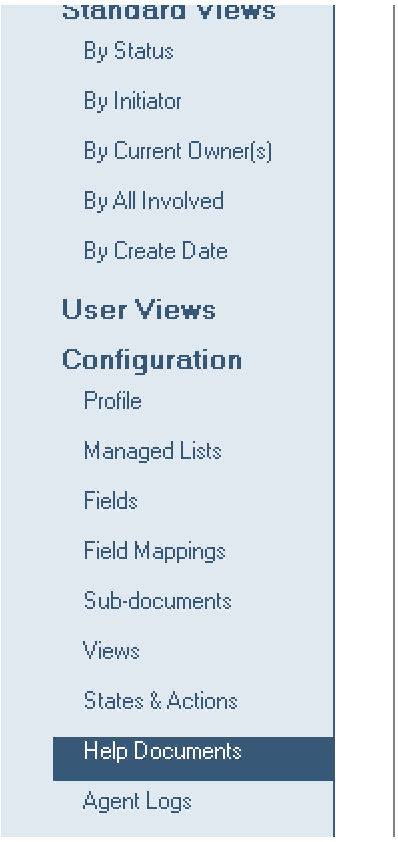


Defining Help Documents

Help documents are used as a quick method for users to understand a process and to be able to use the database.

Simply highlight the **'Help Documents'** option from the configuration toolbar on the left-hand side of the screen and select the **'Add Help Documents'** button from the top toolbar as required. See Fig 1.

(Fig 1)


Standard Views
By Status
By Initiator
By Current Owner(s)
By All Involved
By Create Date
User Views
Configuration
Profile
Managed Lists
Fields
Field Mappings
Sub-documents
Views
States & Actions
Help Documents
Agent Logs