

Partners Online Training Supportive Material

What is Comidor?

- **DIGITAL WORKPLACE**
 - Interactive & customizable dashboards Collaboration apps & knowledge tools
- **HYPER-AUTOMATION**
 - BPM & Workflow Automation RPA & AI/ML Process Intelligence
- **LOW-CODE App Designer**
 - App creation in simple steps
- **MARKETPLACE**
 - Out-of-the-box business apps



Users & Roles

- The first user that is registered in Comidor is the System Administrator (Admin). The **Admin** is responsible for managing Comidor Users, creating Personnel and passwords, editing, deactivating a user, and more.
- Every time a new user is created a new record is inserted in Personnel table, with active state.
- You can create a new User and then modify their details in the [Personnel](#) unit
- After creating a user, you need to allocate specific Application Rights and add the user to a group(s) in the [organizational chart](#)
- System Administrator access is available only to users that have the Enterprise Architect role
- A user can be de-activated but not deleted.
- Rights can be assigned to an existing role that can be assigned to a user in User Roles. These rights (managed from the Application Rights unit) can give responsibilities such as handling financials, setting up users and their application rights, or handling people management activities e.g., absences.

[Find out more here.](#)

Ellie Frewer

Summary Contact Details

Save Cancel

☆ First Name Ellie

☆ Last Name Frewer

Title

☆ Username efrew

☆ Password

System Administrator? ☐

Data Manager? ☐

User-Level User

Write Access Protected

Add access to Mobile application ☐

Category

Job Title SL-MAN Sales Manager

Education

Principal Name

Division Europe

☆ Company Germany

Location Frankfurt

Contractual location Frankfurt

Timezone Europe/Berlin

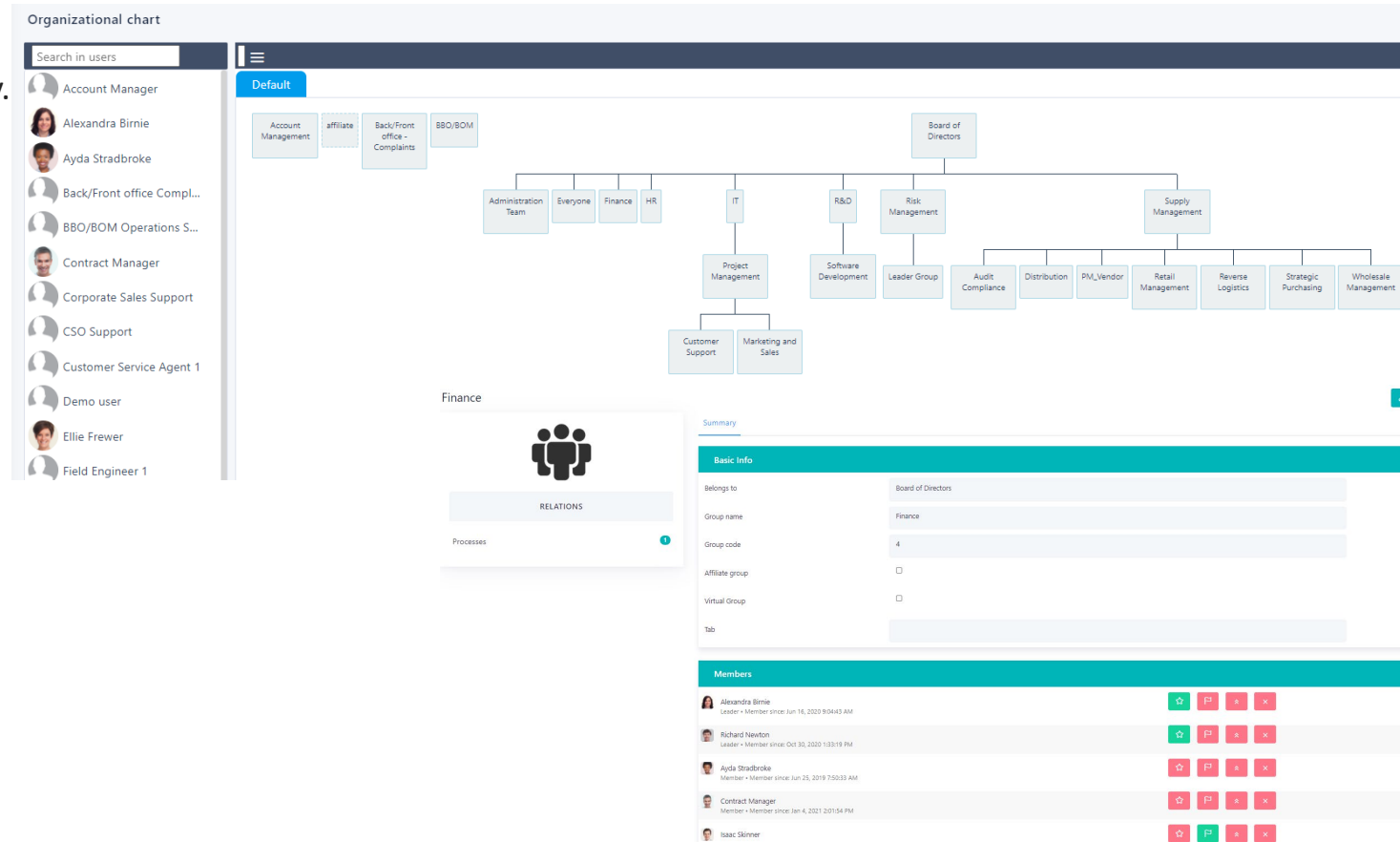
Locale English (United...)



Organizational chart

Depict your organisational structure and build functional teams

- **Make the structure** of your company **clear** to any employee
- Ensure that **information flows correctly** throughout the company. Groups, leaders and just members can be used as assignment options in tasks and processes.
- Design your [Organisational structure](#) and **fulfill your goals**
- **Enhance collaboration** between different departments in the organisation
- **Distinguish** between the **leaders** and the **members** of a group easily and illustrate the relationships among personnel
- **Organise** and **monitor** the company's performance by group



[Find out more here.](#)

Application & role rights



- Application Rights gives the ability to administrators to hide or allocate modules and menus to users e.g., you may want to let specific users have access to the financial module.
- With Comidor you can allow users to access certain modules but restricting their access to functions within those modules. Any role created can be managed in terms of Rights (e.g., which units from Modules will be visible for each role).
- This refers only to System Administrator Users.

Application rights

Available packages

Role Rights

Search...

Username	CRM	PM	ACC	BPM	HRM	ADMIN	APPFACORY	BASIC	
Richard Newton	<div>active</div>	<div>active</div>	<div>active</div>	<div>active</div>	<div>active</div>	<div>active</div>	<div>active</div>	<div>active</div>	<div>Deactivate all</div>
Ayda Stradbroke	<div>active</div>	<div>active</div>	<div>active</div>	<div>active</div>	<div>active</div>	<div>inactive</div>	<div>inactive</div>	<div>active</div>	<div>Activate all</div>
Alexandra Birnie	<div>active</div>	<div>active</div>	<div>active</div>	<div>active</div>	<div>active</div>	<div>active</div>	<div>active</div>	<div>active</div>	<div>Deactivate all</div>
Kaitlyn Dalton	<div>inactive</div>	<div>inactive</div>	<div>inactive</div>	<div>inactive</div>	<div>active</div>	<div>inactive</div>	<div>inactive</div>	<div>active</div>	<div>Activate all</div>
Charlie Marr	<div>inactive</div>	<div>inactive</div>	<div>inactive</div>	<div>inactive</div>	<div>active</div>	<div>inactive</div>	<div>inactive</div>	<div>active</div>	<div>Activate all</div>
Isabella Hardey	<div>inactive</div>	<div>inactive</div>	<div>inactive</div>	<div>inactive</div>	<div>active</div>	<div>inactive</div>	<div>inactive</div>	<div>active</div>	<div>Activate all</div>
Isaac Skinner	<div>inactive</div>	<div>inactive</div>	<div>inactive</div>	<div>inactive</div>	<div>active</div>	<div>inactive</div>	<div>inactive</div>	<div>active</div>	<div>Activate all</div>
Ellie Frewer	<div>inactive</div>	<div>inactive</div>	<div>inactive</div>	<div>inactive</div>	<div>active</div>	<div>inactive</div>	<div>inactive</div>	<div>active</div>	<div>Activate all</div>
Harry Bright	<div>inactive</div>	<div>inactive</div>	<div>inactive</div>	<div>inactive</div>	<div>active</div>	<div>inactive</div>	<div>inactive</div>	<div>active</div>	<div>Activate all</div>
Contract Manager	<div>inactive</div>	<div>inactive</div>	<div>inactive</div>	<div>inactive</div>	<div>active</div>	<div>inactive</div>	<div>inactive</div>	<div>active</div>	<div>Activate all</div>
Robot User 1	<div>inactive</div>	<div>inactive</div>	<div>inactive</div>	<div>inactive</div>	<div>inactive</div>	<div>inactive</div>	<div>inactive</div>	<div>active</div>	<div>Activate all</div>
Harrison Jones	<div>active</div>	<div>active</div>	<div>inactive</div>	<div>inactive</div>	<div>active</div>	<div>inactive</div>	<div>inactive</div>	<div>active</div>	<div>Activate all</div>
Guest User	<div>inactive</div>	<div>inactive</div>	<div>inactive</div>	<div>inactive</div>	<div>inactive</div>	<div>inactive</div>	<div>inactive</div>	<div>active</div>	<div>Activate all</div>
Demo user	<div>active</div>	<div>active</div>	<div>active</div>	<div>active</div>	<div>active</div>	<div>active</div>	<div>active</div>	<div>active</div>	<div>Deactivate all</div>
Presales Manager								<div>inactive</div>	<div>Activate all</div>
Presales Specialist								<div>inactive</div>	<div>Activate all</div>
Corporate Sales Support								<div>inactive</div>	<div>Activate all</div>

Application rights

Available packages

Role Rights

Search for a role

Content Creator

Database Administrator (DBA)

Accounts Administrator

Hiring Manager

Interviewer

People Manager

Project Manager

Resource Manager

Team Leader

Engineer/Application Developer

CEO

Consultant

Project Coordinator

Business Analyst

Content Editor

People Management Officer

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Analytics

Workflow Reports

Timecards

ActivityMenu

Widgets

Daily Utilities

Business set up

Daily Utilities

User Management

HRM Reports

Quick Add

PM Reports

Application Setup

App Factory

Packages

My Company

Accounting and Finance

CRM Reports

People Management

Process Orchestration

Reports & Analytics

Project Management

Financial Reports

Process Automation

Approvals

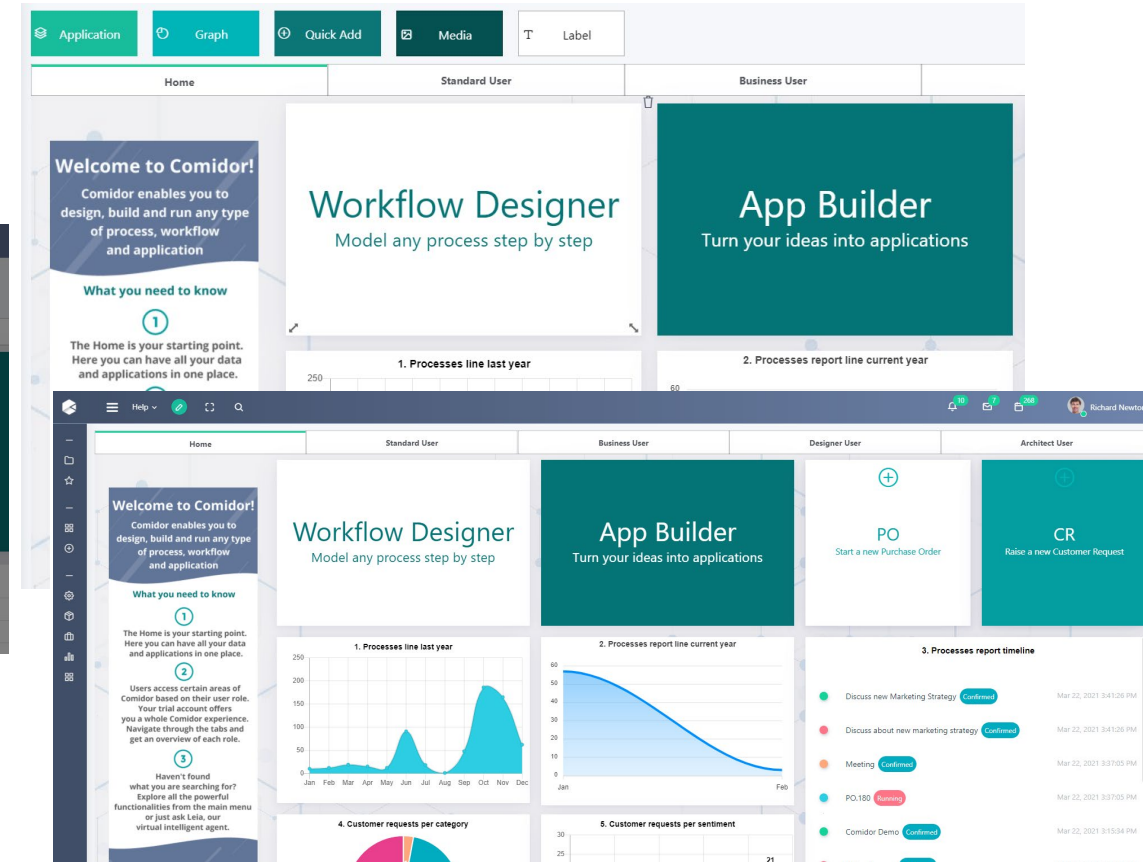
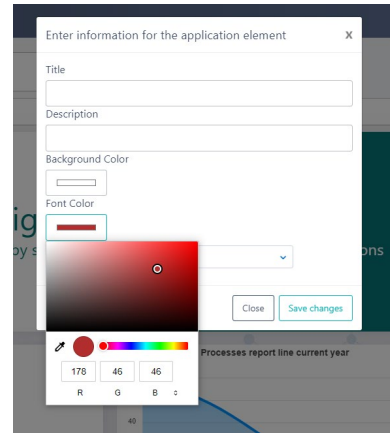
UserAppMenu

Unit Name	Description	Disable All
Projects		<div>active</div>
Work Packages		<div>active</div>
Progress Management		<div>active</div>
Earned Value Analytics		<div>active</div>
Personnel Booking		<div>active</div>
Customer Complaints		<div>active</div>
Lessons Learned		<div>active</div>
Project Actions		<div>active</div>
Rag status Parameters		<div>active</div>
Risks		<div>active</div>

[Find out more here.](#)

Home Dashboard

- The default screen in Comidor is the Home Dashboard. The new Home Dashboard saves you time, offering exactly what you need in one single panel. With all your applications and widgets in one place, your work has never been easier.
- Create a more customised experience that matches your daily tasks and processes. Build and modify your dashboards with a simple to use no-code builder.
- Add multiple tabs, application tiles, “quick add” tiles, graphs, media(images/videos), and labels.
- Customise your dashboard easily with drag-n-drop tiles and add the colors you wish, resize or delete them.



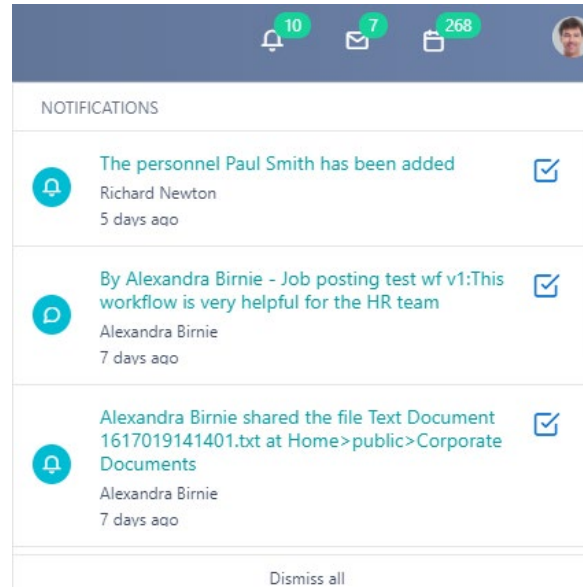
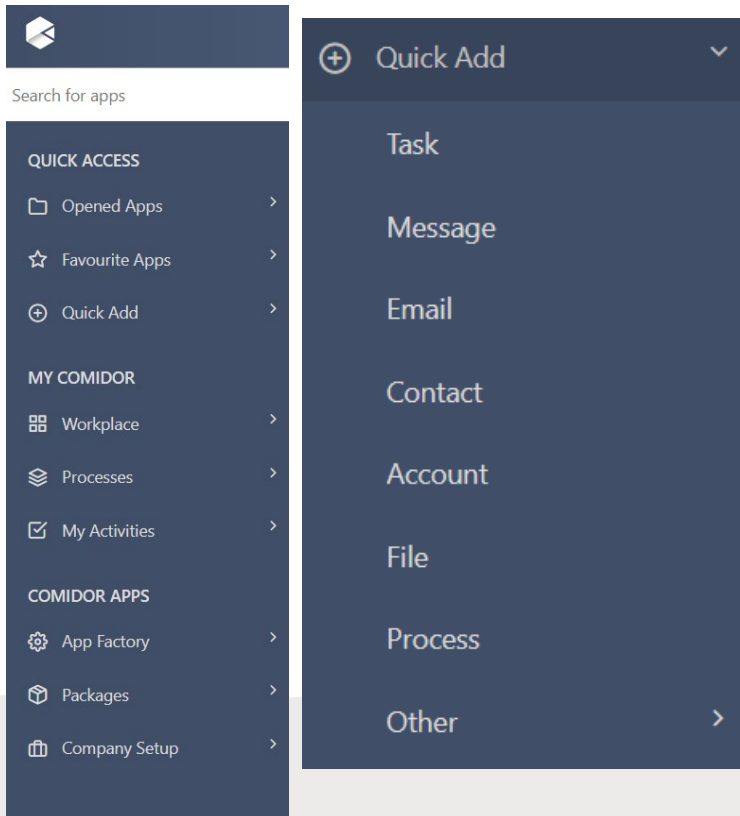
[Find out more here.](#)

[View video here.](#)

Menu & Notifications

Comidor is designed to enable users to focus on their tasks and prioritize their workload.

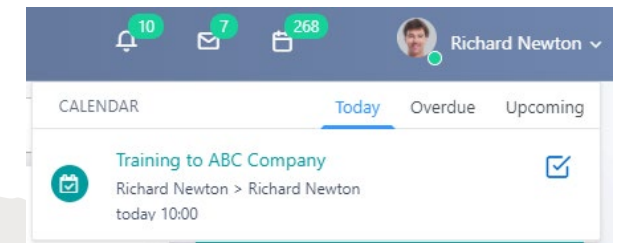
Menus, filters, icons, buttons and lists are all designed and arranged in a way that allows users to easily identify their needs and tasks and execute quickly and efficiently.



Find out more [here](#) about Comidor's menu



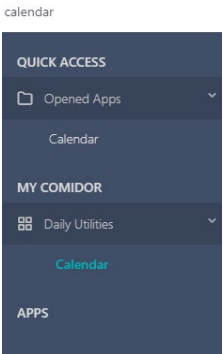
- In the top right of the page is the Notifications Bar. There are three icons and when a new notification is received a blue box will appear next to the relevant icon. The five icons are:
- **Notifications**
 - **System Notifications** These inform the user when a new task/process is added; when it's time to start a new one; when someone has shared a folder or when an existing task/process has been completed. [Reminders](#) will show up here as well. These [Notifications](#) are also in the [Workbench](#) Activity Stream.
 - **News** – When someone has commented on a specific [Process](#) or [Task](#) a notification will be displayed here. Notifications regarding specific Comidor objects are displayed here as well
- **Messages** – When a new [Email](#) is received the alert will be displayed here. Customise Email notifications in User Settings
- **Calendar** – The [Calendar](#) icon opens a Calendar that shows your tasks for the current day



Tasks & Calendar

Comidor Tasks offer a reliable and transparent approach to Task Management. It manages personal tasks, team tasks, assigned tasks and tasks assigned to other users. All Comidor tasks can be managed, even if they have been created using another Comidor unit (Quick Adds or Calendar).

- Tasks can be created for completing a one-off task, e.g. write a report on the impact of GDPR.
- Tasks can also be linked to a Process.



Comidor provides a fully interactive calendar where you can monitor your activities (tasks, meetings, assignments, events, etc.) and orders (assigned tasks) on a daily, weekly or monthly basis.

Quick add: Task

Schedule the task

Title

Update Quick reference - Glossary

Assigned to

Richard Newton

Supervised by

Task type

Date/time/hours

Process

Account

Description

Complete the ta

State

Date/time/hours

Quantity/Amount

Save

Cancel

Tasks Update Quick reference - Glossary

RELATIONS

Change history

Notifications

Subtasks

Assets

OWNERSHIP

Created on

Apr 5, 2021 8:00:40 AM

Created by

Richard Newton

Updated on

Apr 5, 2021 8:00:40 AM

Updated by

Richard Newton

Details

Basic Info

Title

Update Quick reference - Glossary

Assigned to

Richard Newton

Priority

Normal

Scheduled start

Apr 5, 2021

Scheduled end

Apr 5, 2021

Scheduled duration hours

0.00 (subtasks: 0.00)

Activity

Process

Account

Description

State

Scheduled

Start

Apr 5, 2021

End

Duration hours

0.00 (subtasks: 0.00)

Output

Quantity

0.00

Amount

0.00

Report

[Find out more here.](#)

Calendar						
April 2021						
Month	Week	Day				
All tasks	Only pending					
Mon	Tue	Wed	Thu	Fri	Sat	Sun
NDA Agreement 1st phone call - partners Britling Co		Training to ABC Company 2.00 hours		Training to ABC Company 2.00 hours		
Training to ABC Company 2.00 hours	Training to ABC Company 2.00 hours	Training to ABC Company 2.00 hours		Training to ABC Company 2.00 hours		
Training to ABC Company 2.00 hours	Training to ABC Company 2.00 hours	Training to ABC Company 2.00 hours	Training to ABC Company 2.00 hours	Training to ABC Company 2.00 hours		
Training to ABC Company 2.00 hours	Training to ABC Company 2.00 hours	Training to ABC Company 2.00 hours	Training to ABC Company 2.00 hours	Training to ABC Company 2.00 hours		
Training to ABC Company 2.00 hours	Training to ABC Company 2.00 hours	Training to ABC Company 2.00 hours	Training to ABC Company 2.00 hours	Training to ABC Company 2.00 hours		
Training to ABC Company 2.00 hours	Training to ABC Company 2.00 hours	Training to ABC Company 2.00 hours	Training to ABC Company 2.00 hours	Training to ABC Company 2.00 hours		
Training to ABC Company 2.00 hours	Training to ABC Company 2.00 hours	Training to ABC Company 2.00 hours	Training to ABC Company 2.00 hours	Training to ABC Company 2.00 hours		

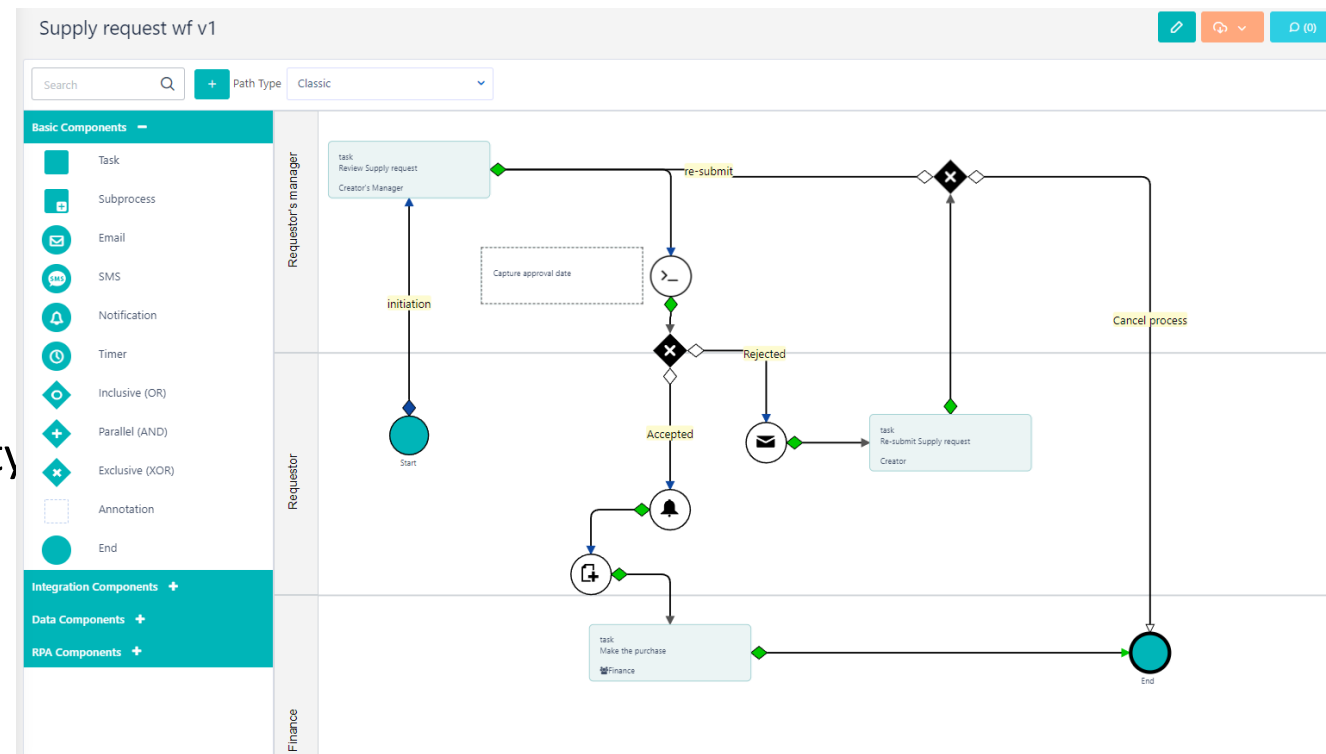
[Find out more here.](#)

Workflow Designer

With Comidor BPMN 2.0 designer, you can map and optimize any process that takes place in your company.










































Workflows fully exploit the organizational structure to provide unprecedented process design and action monitoring. Through Workflows Designer, the user can navigate and modify existing processes or create a new one using BPMN 2.0 with drag-and-drop functionality

[Find out more here.](#)



Workflow Components



Basic Components —	Integration Components —	Data Components —	RPA Components —
 Task	 RESTful Web Service	 Comidor DATA (IUD)	 RPA Caller
 Subprocess	 Message Queue	 Shell Command	 RPA Receiver
 Email	 Teams Integration	 File Reader	 Sentiment Analysis
 SMS	 Google Integration	 Export Data	 Document Analyzer
 Notification	 Zoho Projects API	 Convert data	 Text Classification
 Timer	 FreshDesk API	 Digital Signature	 Predictive ML
 Inclusive (OR)	 Salesforce API	 Document Creator	 Selenium RPA
 Parallel (AND)	 Zoho Leads API	 QR Generator	 Image Classification
 Exclusive (XOR)		 Table Extractor	 Web Scraper
 Annotation		 Excel Processor	
 End		 Create graph	
		 SQL Creator	
		 Blockchain	

[Find out more here.](#)

App Designer

Comidor platform offers the ability to design your own apps through [App Designer](#), without using any coding. Making simple or more complicated Apps is easier than ever, even for non-developer users. Comidor guides you with simple steps, in order to publish your idea.

There are various types of applications provided in Comidor App Designer. You can choose the one that fits better your needs from the following options.

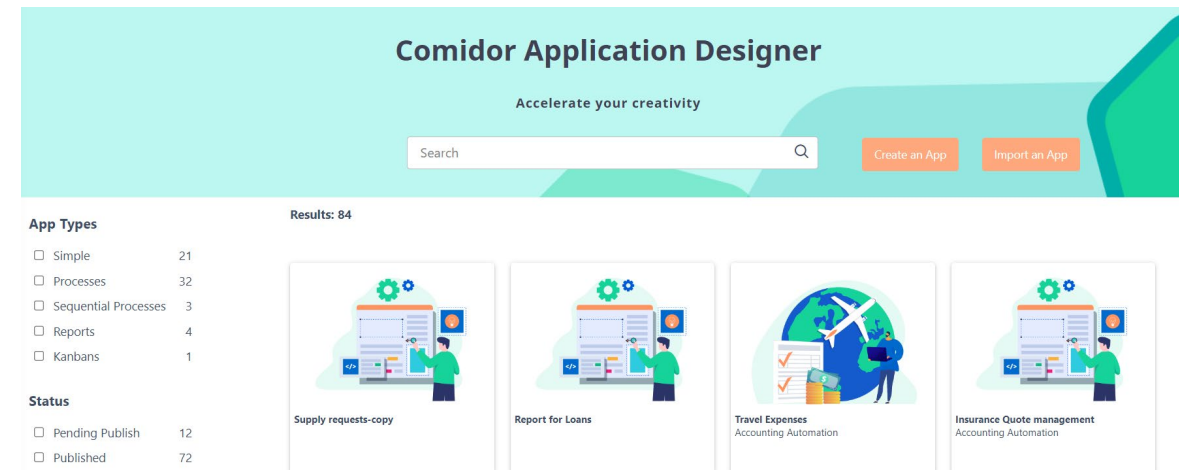
Types of Applications

1. Table applications:

- The [Sequential process-based](#): Choose this type when you want to monitor processes that are simple with only sequential tasks, with scheduling, state, completion, etc.
- The [process-based workflow](#): Choose this type when you want to monitor process-enabled records, with scheduling, state, more complicated workflow steps, loops, automation steps, completion, etc.
- [Simple Non-process based](#): Choose this type of table application when you want to create a table of data-driven records. No workflows can be related to this type.

2. [Report applications](#)

3. [Kanban applications](#)



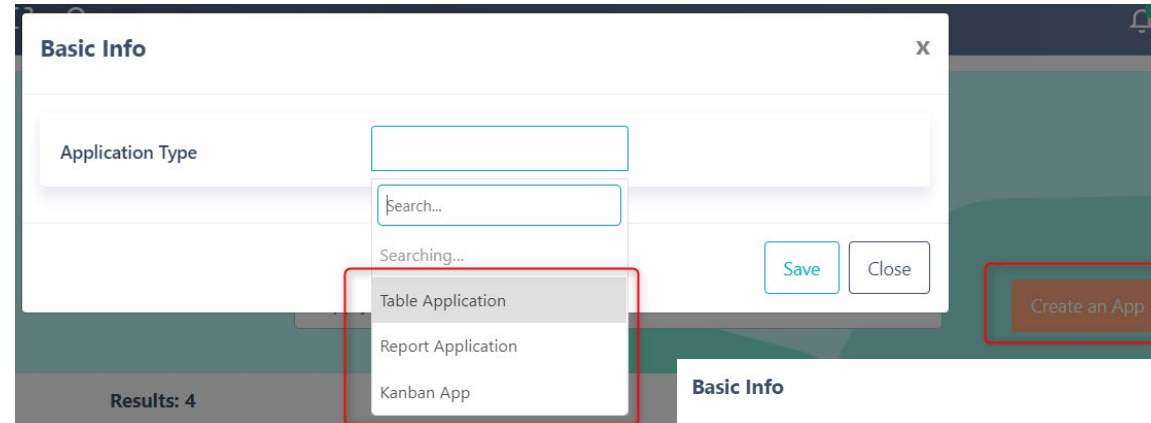
Create an App



Application example: Supplies

Basic Info

1. Select the **Application Type** (Table/ Report/Kanban)
2. Give the **Application Name** and **Description**
3. Classify your app in a proper **Category**. Choose one Category from the existing options, or make a new Category. Categorization will help you find easier your apps in the App Designer.
4. Define whether the App is **Process enabled or not**. Process enabled apps can be linked with a [Workflow](#).
5. **Collaborators**: determine which users will be able to see the application in the User Apps menu.
6. You can lock your app, so only your user can edit the app.
7. You can upload an **image** for the application.

A screenshot of the "Basic Info" form in the Comidor application. The form contains the following fields and controls:

- Application Type**: A dropdown menu with "Table Application" selected.
- Application Name**: A text input field containing "Supply request".
- Description**: A large text area for the application description.
- Category**: A dropdown menu.
- Collaborators**: A text input field.
- Is process enabled**: A checkbox that is checked.
- Is Sequential?**: A checkbox that is checked.
- Image**: A section with a "Choose File" button and the text "No file chosen".

Create an App



1. Dashboard

In the step Dashboard, you get an overview of your application. In particular, you are able to view:

Quick Stats:

- Number of forms, Steps and Widgets that are created in this app
- Graphs that show the application activity timeline and the Apps Overview status.

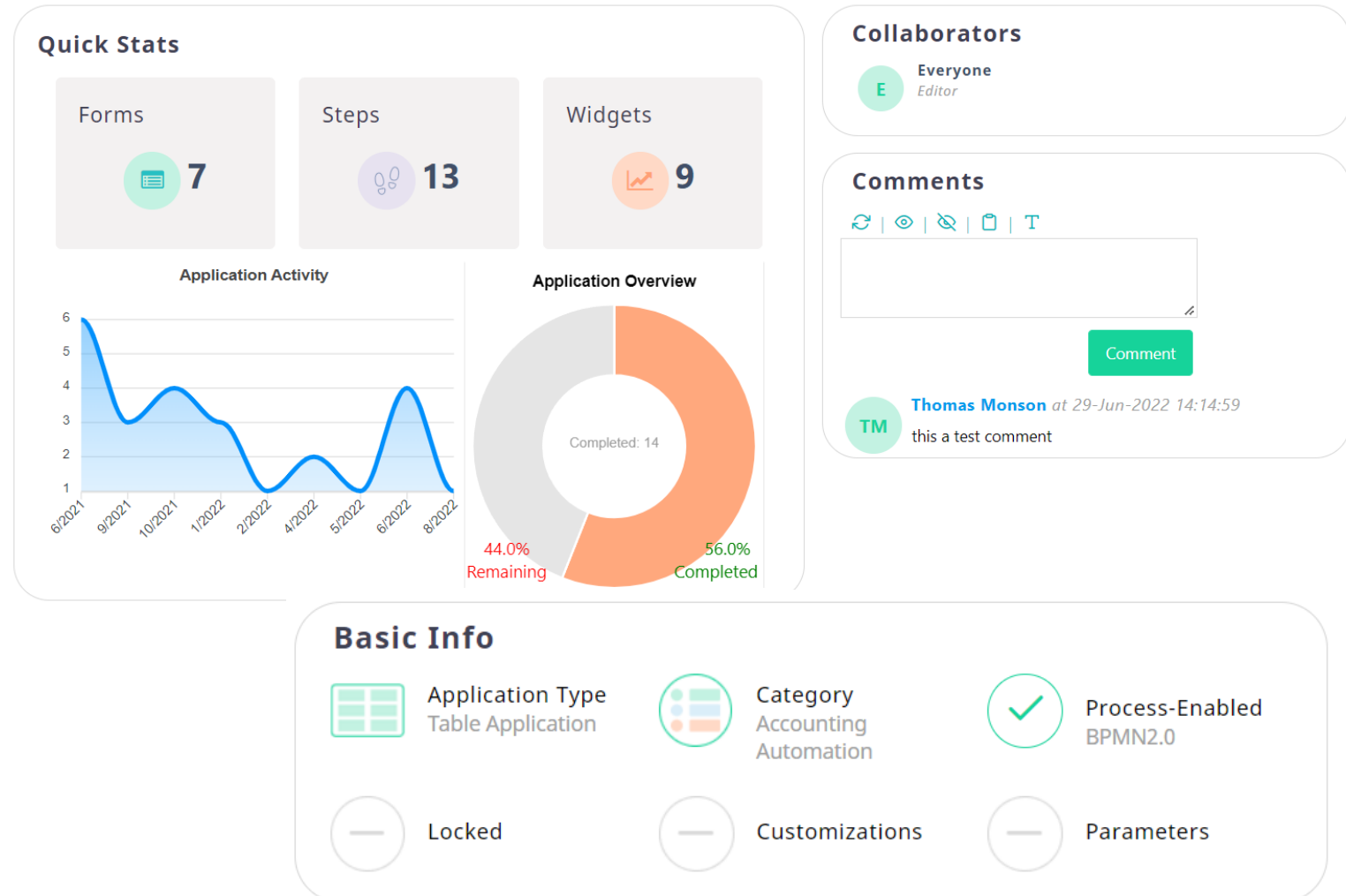
Basic Info:

- the Type, Category, and other parameters
- You can click on the pencil button to edit the above info
- You can lock your app by checking on the Locked option. With this option, only the user that locks the app will be able to edit the app (in all steps). All the rest users will just be able to view the app, but can not edit it.
- By checking the Has customizations option, the application will not be exportable.
- Put a flag to remember if this application Has application parameters.

Collaborators: the users or groups that have access rights in this App.

Comments: an area where users that have access can write and view comments.

Application example: Supplies



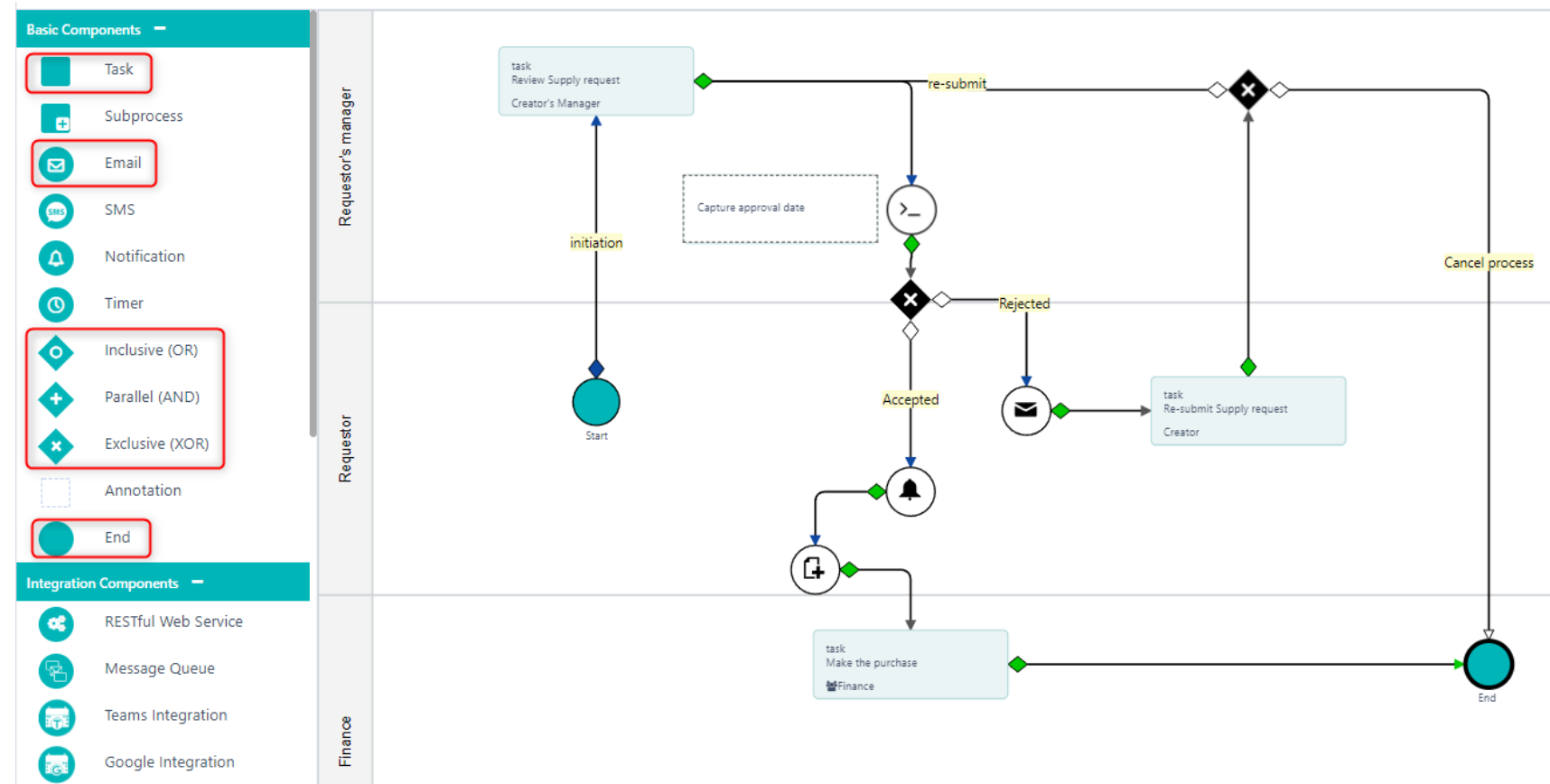
2. Process Workflow



In this step, you can fully design your process in terms of the number and the looks of the process steps, your Data model, Table View and User forms.

Workflow example: New Supply Request

- Separate the pool in different lanes according to which group will perform each task
- Create the 3 tasks with drag and drop functionality
- Decide which of the gateways is appropriate according to the case
- Connect the tasks with the gateways to complete your workflow



2. Process

Data Model

When you open the Data model tab, you will see a sub-table with the some columns: icon, label, size, column name, created by, etc.

You can see the existing and/or add all fields that you want to be used in the App here. You can click on the “+” to create your own custom fields.

- **User fields types:** Text, Memo (Paragraph), Number, Binary File, Drop-down list (Key-Value or Comidor Database lists), Excel, Currency, Checkbox, Date, more.

Note that, if you have selected this app to be process enabled, you can also use in the forms all process-related fields. If you left “is Process enabled” unchecked, you can only use the fields displayed in the Data model.

Do not forget to reload the DB after you created all the fields, so that the other users can see them.



1 Dashboard
Get an overview of your Application

2 Process
Design your Application

3 Graphs
Create analytics for your Application

4 Advanced
Level up the automation

5 Configuration
Finalise your application

WorkflowData ModelTable ViewUser Forms

Data Model

Search...

	Label	Size	Column name		Created by	Created on	Last Updated by	Last Updated on	
<input type="checkbox"/>	\$ Total price	12	USR_TOTAL_PRICE	TM	Thomas Monson	24-Mar-2022 15:23:47	Thomas Monson	24-Mar-2022 15:23:47	
<input type="checkbox"/>	\$ Price	12	USR_PRICE	TM	Thomas Monson	24-Mar-2022 15:23:35	Thomas Monson	24-Mar-2022 15:23:35	
<input type="checkbox"/>	T approval1	50	USR_APPROVAL1	TM	Thomas Monson	20-Oct-2021 13:48:20	Thomas Monson	20-Oct-2021 13:48:20	
<input type="checkbox"/>	≡ testmemo	10000	USR_TESTMEMO	TM	Thomas Monson	20-Oct-2021 12:11:24	Thomas Monson	20-Oct-2021 12:11:24	
<input type="checkbox"/>	≡ Request for user	0	USR_REQUEST_FOR_USER	TM	Thomas Monson	08-Jun-2021 07:31:44	Thomas Monson	08-Jun-2021 07:31:44	
<input type="checkbox"/>	≡ Process	0	PROCESS_ID	TM	Thomas Monson	08-Jun-2021 07:22:55	Thomas Monson	08-Jun-2021 07:22:55	
<input type="checkbox"/>	📅 Date of request	0	USR_DATE_OF_REQUEST	TM	Thomas Monson	08-Jun-2021 07:22:55	Thomas Monson	15-Jun-2022 06:34:20	
<input type="checkbox"/>	📅 Manager's approval date	0	USR_MANAGER_S_APPROVAL_...	TM	Thomas Monson	08-Jun-2021 07:22:55	Thomas Monson	08-Jun-2021 07:22:55	

2. Process

Table View

- You can determine which columns you wish your App to have in the main table. By default, you should see all the table fields you have created in the steps and will be added as columns in your application table. Each field has pencil and x buttons.
- You can add more Columns, by clicking on the “+” icon and selecting the desired field.
 - Note that, if you have selected this app to be process enabled, you can also add process related fields as columns(e.g., date created, creator, stage, etc.)
- Re-arrange the position of each column with drag-n-drop.
- Add label to the column name, set Prefix or Suffix to be displayed before or after the value of each entry, select the preferred alignment and other properties.
- Switch to mobile view, to get a preview of your Application table in a browser of a mobile device. Choose a preferred device (mobile, tablet)



1 Dashboard
Get an overview of your Application

2 Process
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Create analytics for your Application

4 Advanced
Level up the automation

WorkflowData ModelTable ViewUser Forms

Basic Options

Please drag and drop columns on the right side to edit the application table

Date of request

Manager's approval date

Ref no

Re-submit order?

Request for user

T approval1

Application Table

St... ✎ ✕	Pri... ✎ ✕	Pu... ✎ ✕	Q... ✎ ✕	Re... ✎ ✕	Da... ✎ ✕	Re... ✎ ✕	St... ✎ ✕	Pri... ✎ ✕	To... ✎ ✕
Number 1	Number 1	Text 1	Number 1	Number 1		Number 1	Text 1		
Number 2	Number 2	Text 2	Number 2	Number 2		Number 2	Text 2		
Number 3	Number 3	Text 3	Number 3	Number 3		Number 3	Text 3		



2. Process

User Forms

- All forms included in this App are visible in the tab User Forms. Create a new or edit the existing ones here.
- [Forms](#) can be used as Main forms in a Process (Workflow-driven or not) or as forms inside the Activities(tasks).
 - Design your form easily, with drag-n-drop of fields, and group them with Sections. Don't forget to Publish your form after finishing your design.
 - Multiple Columns, Paragraphs and Style may be added inside a Form
 - Forms may have its own view and change rights
 - Fields added inside forms may be "read only" or "read/write" per form
 - Fields added inside forms may be mandatory or not
 - Forms may be supported with scripts



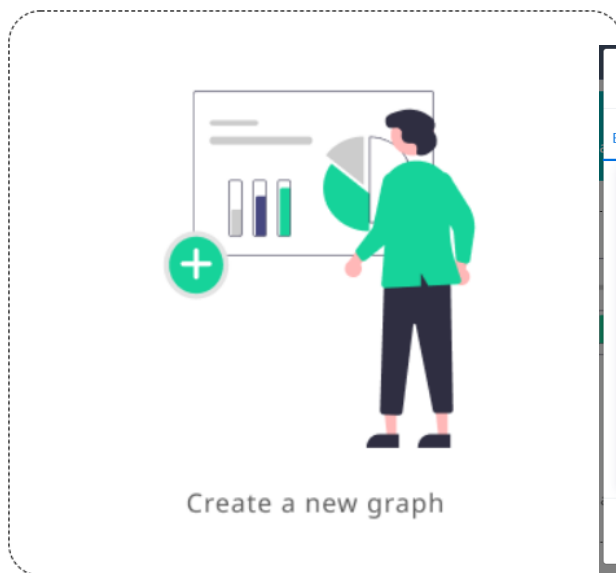
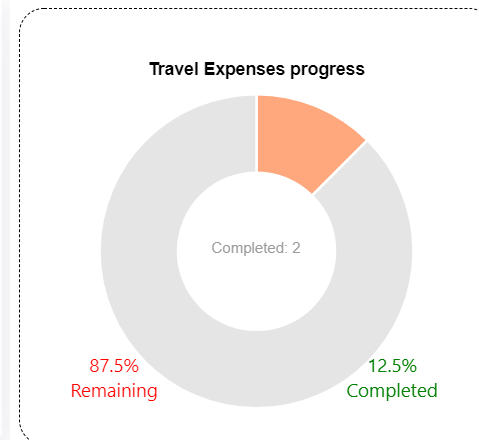
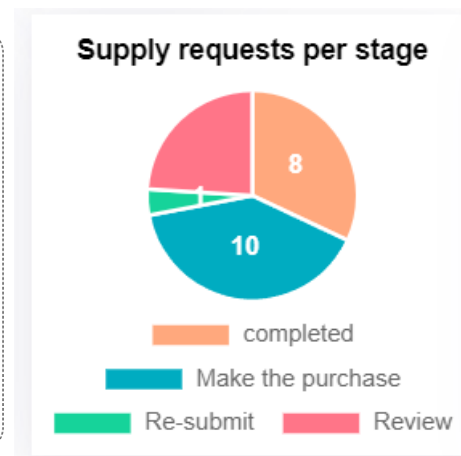
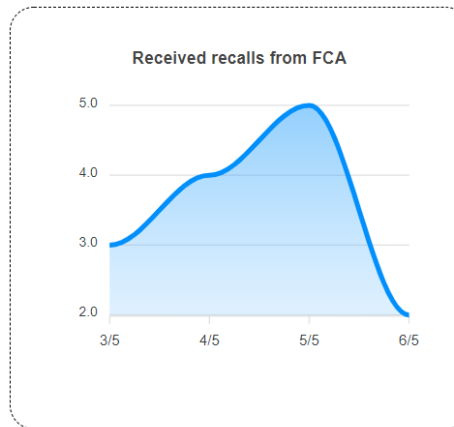
The screenshot displays the Comidor User Forms interface. On the left, a vertical sidebar contains a progress bar with six steps: 1. Dashboard (Get an overview of your Application), 2. Process (Design your Application - highlighted with a green checkmark), 3. Graphs (Create analytics for your Application), 4. Advanced (Level up the automation), 5. Configuration (Finalise your application), and 6. Analytics (Monitor App).

The main area at the top has tabs for Workflow, Data Model, Table View, and User Forms (which is selected). Below the tabs, there's a message: "You haven't selected a form. Please select one!" with an illustration of two people looking at a sad green circle. Below this is a "Select a form" input field with "Ok" and "+" buttons. A dropdown menu is open, showing a search bar and a list of forms: "Supply request" (highlighted), "Request details", "Summary form", and "Review request mobile".

The bottom section shows the "Design" view for the "Supply request" form. It includes a "Design" panel on the left with "Elements" (Panel, Section, Code, Paragraph, Style, Misc, Group) and "Fields" (Search, Supply requests, Process, approval1, Date of request, Manager's approval date, Price). The main design area shows a "Panel" containing a "Section" with various form fields: "Request type", "Purchase item", "Quantity", "Price", "Total price", "Request for user", "Purpose of purchase", and "Priority". On the right, there's a "Basic" tab (selected) and an "Advanced" tab. The "Basic" tab shows settings for "Record type" (Supply requests), "Title" (Supply request), "Access" (Everyone), "Main" (unchecked), "Primary" (unchecked), "Quick" (In quick add menu), and a "Save" button.

3. Graphs

- In step 3, you can design your app Graphs or Widgets. Comidor Widgets are the ideal choice for data visualization. Get the most updated data on the visualization format you define.
- Create your own personalized dashboard in seconds.
- Combine multiple views of data to get richer insight.



Graph Form

Basic Info Design Advanced

Title *

Category

Level

Type *

Graph type *

Library used *

Search...

Searching...

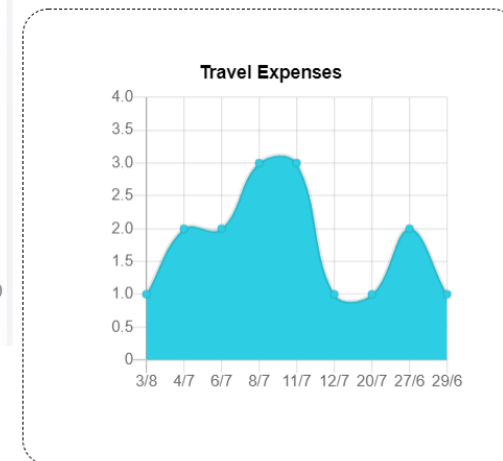
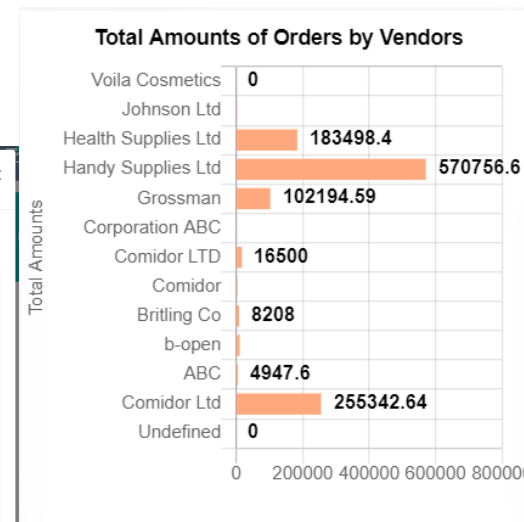
Report

Grouping Chart

Conditional Grouping Chart

KPIs

Save Close



4. Advanced

Get the most out of the App Builder with this advanced options step by including **user tabs** in your records or the table of your app, **event scripts** and **field rules** to show or hide fields, sections or tabs in forms when specific conditions are met. This step is available only for Table applications (non-process & process enabled).

- **User Tabs**

Use tabs to have complete control over the accessibility of you application.

- The tabs can appear inside records (as a tab at the left part of the record) or at the summary table of the application.
- A tab can be a table from any Comidor entity, HTML, or a [widget](#).

1 Dashboard
Get an overview of your Application

2 Process
Design your Application

3 Graphs
Create analytics for your Application

✓ Advanced
Level up the automation

User TabsEvent ScriptsField Rules

User Tabs

Search...

	Title	Type	View tab in:	Insert Mode	
<input type="checkbox"/>	Assets	Table	Record	False	
<input type="checkbox"/>	Guidelines	Html	Table	False	
<input type="checkbox"/>	Reports	Widget	Table		

- **Event Scripts**

- In this step, you can write scripts for a certain Data Type to be executed before/after/on a specific event.
- Choose the **Data Type** (apprec, task, process, dataset) and define where you want the script to be applied
- An Event Type can be inserted, updated, deleted, etc.
- In the **Procedure Body** add your code.
 - This is for advanced users to write their procedures.

User TabsEvent ScriptsField Rules

Create new record in:Event Scripts

Basic Info

Procedure Name*

Data Type

Event Type Prefix

Event Type

Position

Parameters

Search...

Searching...

AppRec

ProcessRec

DataSet

TaskRec



4. Advanced

Field Rules

- The [field rules](#) functionality enables you to hide or show fields/sections/tabs inside forms when certain conditions are met.
- You can click on the Field Rules tab and you will be able to see the sub-table of all field rules, with the following columns: Rule title, Field(s), Section(s), Tab(s), Created by, Created on, and the pin button.
- Refresh button: Internal refresh in the table/all updated records are presented
- Search option: type a keyword and press enter; respective field rules appear.
- Pagination: Navigate through available pages to see all Field rules.
- To create a new Field Rule you can press on the “+” button, and the creation form opens.

1 Dashboard
Get an overview of your Application

2 Process
Design your Application



3 Graphs
Create analytics for your Application

✓ Advanced
Level up the automation

User TabsEvent ScriptsField Rules

Field Rules

Search...

	Rule title	Field(s)	Section(s)	Tab(s)	Created by	Created on	
<input type="checkbox"/>	Show rejection comments of manager	Rejection comments			 Thomas Monson	08-Jun-2021 07:23:02	

User TabsEvent ScriptsField Rules

Create new record in:Field Rules

SaveSave and NewCancel

Basic Info

Rule title

Action

On

Appearing in form

Field(s)

Hide

Fields

5 Configuration

- In this step, you can make the configuration of the Application.
- Decide if you wish to include from the **Basic options (1)** ([Notes](#), [Tags, and Links](#), create, edit and/or delete an entry, include print/export options)
- Customise your data (2)** by
 - setting a Prefix and Suffix, an Incremental Number Field
 - Defining a **Primary Field**
 - Defining to whom each entry is assigned to, send notifications, Admin 1,2, and Supervisor.
- Fully customise the app layout, by selecting font sizes and colors in **CSS Design (3)** options.

Publish (4)

- Your app is ready to be used!

- Run from app designer (5)**

Basic Options
 Data Customization
 CSS Design

Style your application

Select font-size

Select font-color

Select background color

Select button color

Has Save&New button

Basic Options
 Data Customization
 CSS Design

Classify Data

Incremental No Field

Ref no x

Starting From

0

Prefix

Supply.

Suffix

Level 1 Categorization

Stage x

Level 2 Categorization

Level 3 Categorization

Ordering

Ascen... x

Grant Rights

Assigned To

Creator x

Creator's Manager x

Finance x

Change Rights

Send Notification To

Administrator

Administrator2


Supervisor






Process Type

Sum field 1

Sum field 2

Sum field 3


Supply requests

1

2

3

4

5

4

Basic Options
 Data Customization
 CSS Design

Please Choose the Appropriate Functions

Include notes

☒

Include tags

☒

Include links

☒

Insert Mode

☐

Update Mode

☒

Delete Mode

☒

Allow user layout change

☒

Allow print

☒

Allow export

☒

Track File Views

☐

Is task window maximized

☐

Automatically start process

☒

Block from mobile

☒

Hide Execution Info

☐

Save Task Button

1 **Dashboard**
Get an overview of your Application

2 **Process**
Design your Application

3 **Graphs**
Create analytics for your Application

4 **Advanced**
Level up the automation

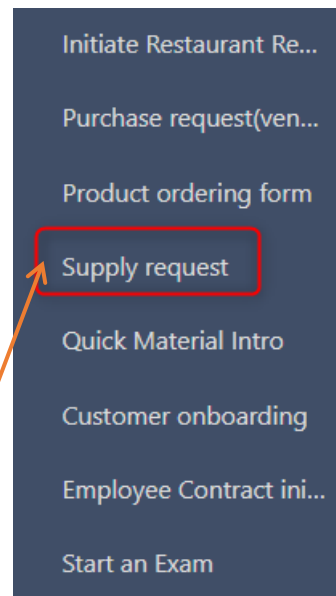
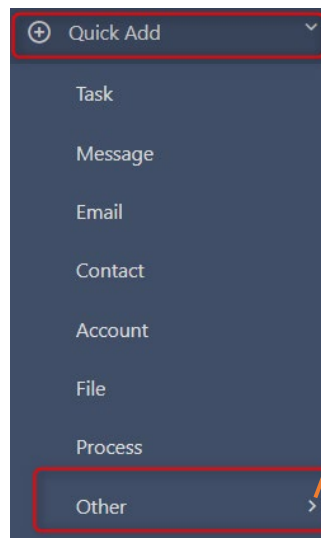
✓ **Configuration**
Finalise your application



Run your application

You can view the User Apps you created and published through App Designer, go to the menu on the left side of your screen, and select the Packages Icon. A list of all the published apps will be displayed here under the category you chose in Step 1 of App designer. In case no Category is chosen, the app is shown below Custom Apps.

- By clicking on the “+” icon you can create a new entry of this app. (In order to see the + icon, you should have checked first the respective option in the Overview step of App builder) A new tab will open with the form that was created in the App Builder. Fill in the fields and click on Save to add this entry.
- If the App is process enabled and linked with a workflow it will have State (Opened, Scheduled, Running, etc.) and some more Tabs in the left-side menu, such as Workflow tasks, attachments, and workflow audit based on the configuration of the App in the App Builder.
- If you have selected the primary form of the app to be also visible in the quick add menu, you can easily initiate this App, from quick add and by clicking on the name of this form.



Request type	Purchase item	Quantity	Price	Total price	Request for user	Purpose of purchase	Priority	Date of request
			£ 0.00	£ 0.00				25/08/2022

State	Priority	Purchase item	Quantity	Request type	Date Created	Review purchase order	Price	Total price
Running	Normal	MacBookPro	1	Hardware	24-Aug-2022 09:25:51	Approve	£1,500.00	£1,500.00
Completed	High	Cables	15	Software	24-Jun-2022 12:43:39	Approve	£500.00	£1,500.00
Running	High	Bathroom Supplies	2	Other	15-Jun-2022 11:03:36	Approve	£0.00	£0.00
Running	High	Antivirus	1	Software	15-Jun-2022 07:42:38		£0.00	£0.00
Running	Normal	Keyboard	1	Other	15-Jun-2022 06:50:46		£20.00	£20.00
Running	High	Office licenses	2	Software	26-May-2022 07:53:14	Approve	£50.00	£100.00
Cancelled	High	Antivirus	2	Software	08-Apr-2022 11:52:13	Approve	£150.00	£300.00
Completed	High	Headphones Sony XT-2	2	Hardware	05-Apr-2022 11:58:18	Approve	£30.00	£60.00
Completed	Normal	Laptop	1	Hardware	07-Feb-2022 10:39:32	Approve	£150.00	£150.00
Running	Normal	laptop	1		27-Jan-2022 15:46:09		£500.00	£500.00
Confirmed	Normal	Mouse	1		18-Jan-2022 10:26:17		£25.00	£25.00
Running	Normal	Antivirus	2		11-Jan-2022 08:56:41		£50.00	£100.00

Other actions:

Users can import/ export/ edit/ delete applications in App builder.

You can find the app under **packages>custom apps** or **under the category** you defined through the app designer basic info.





Thank you!