

Central Flows SharePoint

Administrator Manual

Overview

This document explains the functionality of the Qdabra Central Flow SharePoint Version. This document will be broken down according to the features included in the template part (XTP), and by the end of this guide the user should have a strong understanding on:

- All XTP sections
- Managing Workflow Steps and Assignees
- The Two-Factor Authentication Process (via Authy)
- The Approvals Dashboard

XTP Sections

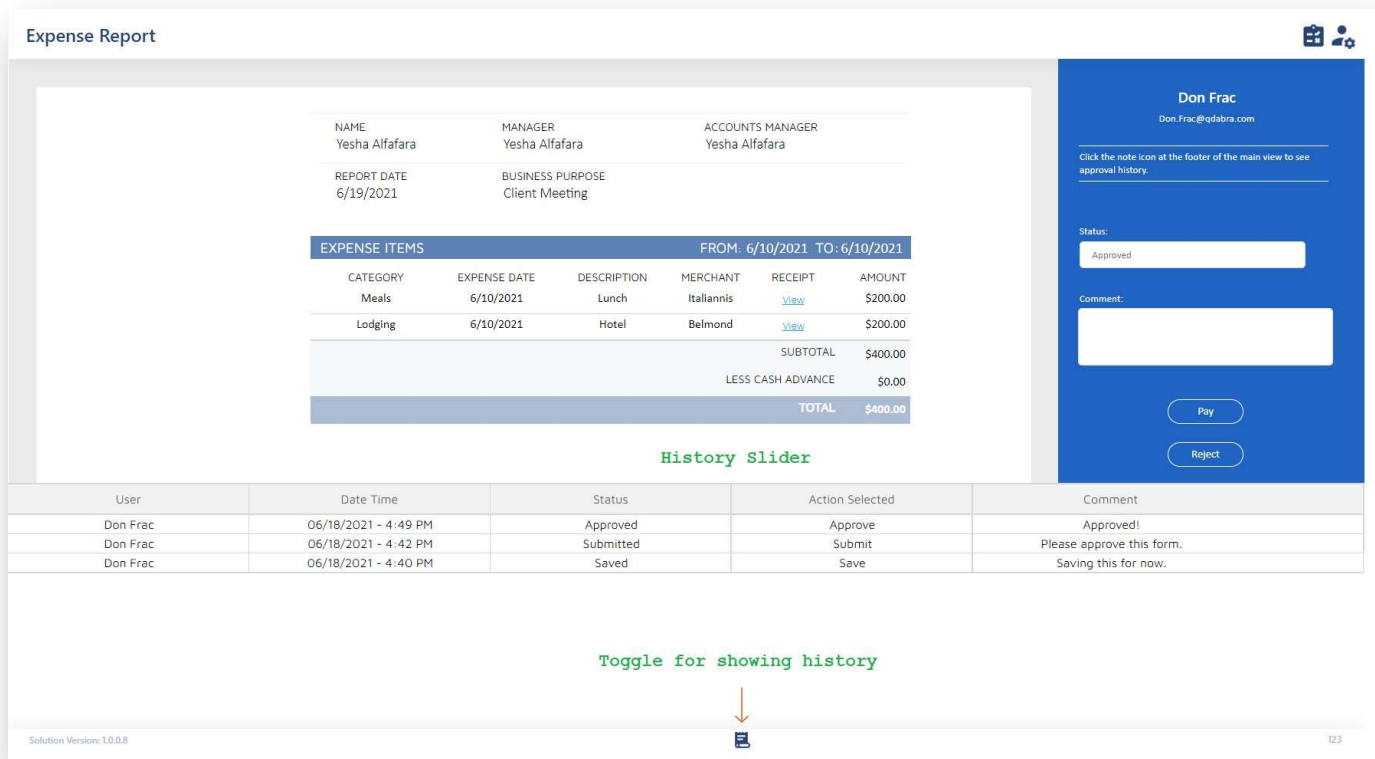
Header

The screenshot displays the Qdabra Central Flow SharePoint interface. On the left, a 'Sample Form' is shown with a 'Form Name' label pointing to the form title and a 'Header' label pointing to the form header. The form contains input fields for 'First Name', 'Last Name', and 'Email', followed by a section labeled '--- Form Section ---'. On the right, a blue sidebar contains the user profile 'Don Frac' with the email 'Don.Frac@qdabra.com'. Below the profile, there is a note: 'Click the note icon at the footer of the main view to see approval history.' The sidebar also includes a 'Status' field with a 'Submitted' value, a 'Comment' field, and 'Save' and 'Submit' buttons. At the top of the sidebar, there are icons for 'Admin Icon' (a left arrow) and 'Approvals Icon' (a right arrow).

The header displays the name of the form. It also contains three icons: Admin, Home, and Approvals.

- When the Admin icon  is clicked, the form will open a new tab and display the table for the workflow steps of the current opened form. (only visible for admins)
- When the Approvals icon  is clicked, it will open the task pane.

History Slider



Expense Report

NAME: Yesha Alfafara | MANAGER: Yesha Alfafara | ACCOUNTS MANAGER: Yesha Alfafara

REPORT DATE: 6/19/2021 | BUSINESS PURPOSE: Client Meeting

EXPENSE ITEMS		FROM: 6/10/2021 TO: 6/10/2021			
CATEGORY	EXPENSE DATE	DESCRIPTION	MERCHANT	RECEIPT	AMOUNT
Meals	6/10/2021	Lunch	Italiannis	View	\$200.00
Lodging	6/10/2021	Hotel	Belmond	View	\$200.00
SUBTOTAL					\$400.00
LESS CASH ADVANCE					\$0.00
TOTAL					\$400.00

History Slider

User	Date Time	Status	Action Selected	Comment
Don Frac	06/18/2021 - 4:49 PM	Approved	Approve	Approved!
Don Frac	06/18/2021 - 4:42 PM	Submitted	Submit	Please approve this form.
Don Frac	06/18/2021 - 4:40 PM	Saved	Save	Saving this for now.

Toggle for showing history

Solution Version: 3.0.0.8

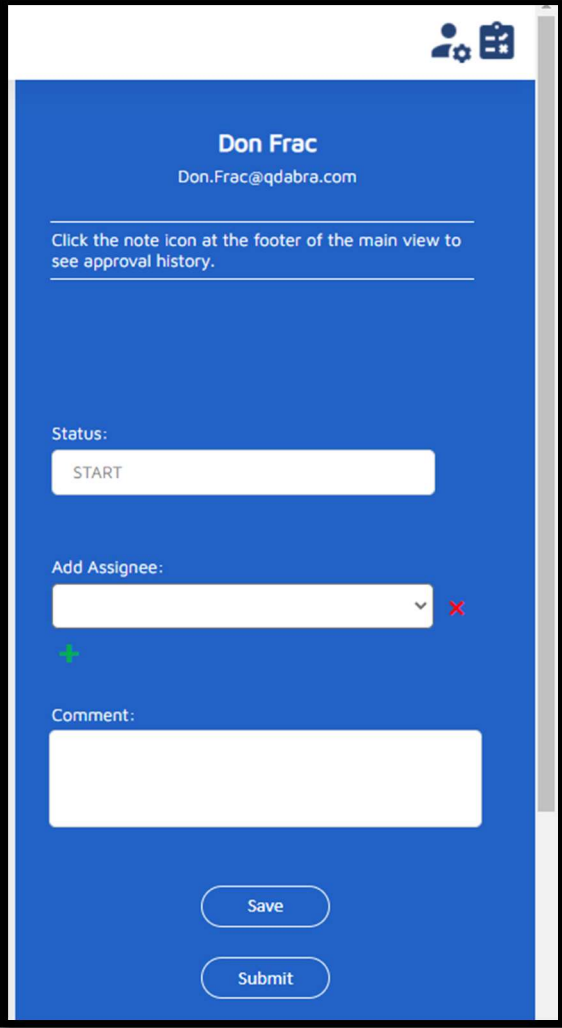
The History Slider is for showing the approvals history of the form. It shows the recent change at the top so users can see the latest changes first. The information shown in the table is helpful when you want to know what steps the form went through or the user(s) who updated the form. The table shows the following:

- Name of the user who updated the status
- Date and time when the status was changed
- The new status of the form when it was updated
- The action the user has taken (same as the button label the user clicked)
- Comment of the user

Task Pane

The task pane is displayed at the right side of the form. User can toggle the task pane by clicking the close button at the upper left corner and by clicking the Approvals icon  to open it. Here are the items you can see in the task pane:

- Current user's name and email
- Form's current Status
- Assignee selection field (optional - see Config Form options)
- Comment section to add comment
- Action buttons to update the status (button labels are based from the Approvals List)



Don Frac
Don.Frac@qdabra.com

Click the note icon at the footer of the main view to see approval history.

Status:
START

Add Assignee:
[Dropdown menu] ✖
✚

Comment:
[Text input field]

Save
Submit

Form Section



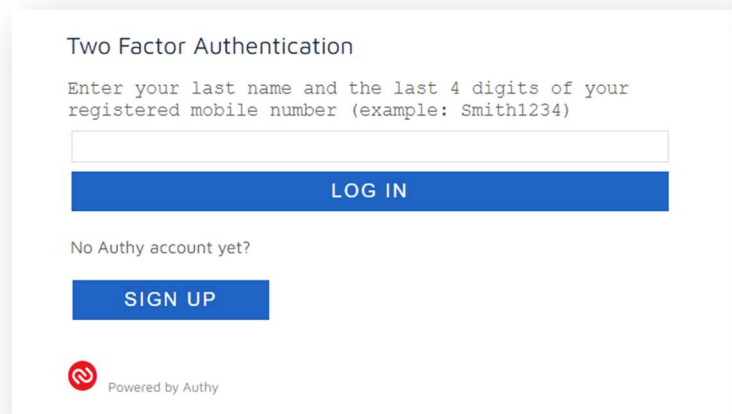
The form section is where the form content should be placed.

Kindly refer to the Deployment Guide's Import XTP section for more information on how to apply the Form Template XTP to your forms.

Authy section

The Authy section is shown when a form is opened anonymously (form URL with "&FVAnon=true"). More information is explained in detail under the subheading "The Two-Factor Authentication Process (via Authy)".

An external user will see this section once they have signed up for Authy.



Two Factor Authentication

Enter your last name and the last 4 digits of your registered mobile number (example: Smith1234)

LOG IN

No Authy account yet?

SIGN UP

 Powered by Authy

Two Factor Authentication

Enter the verification code shown in your Authy App

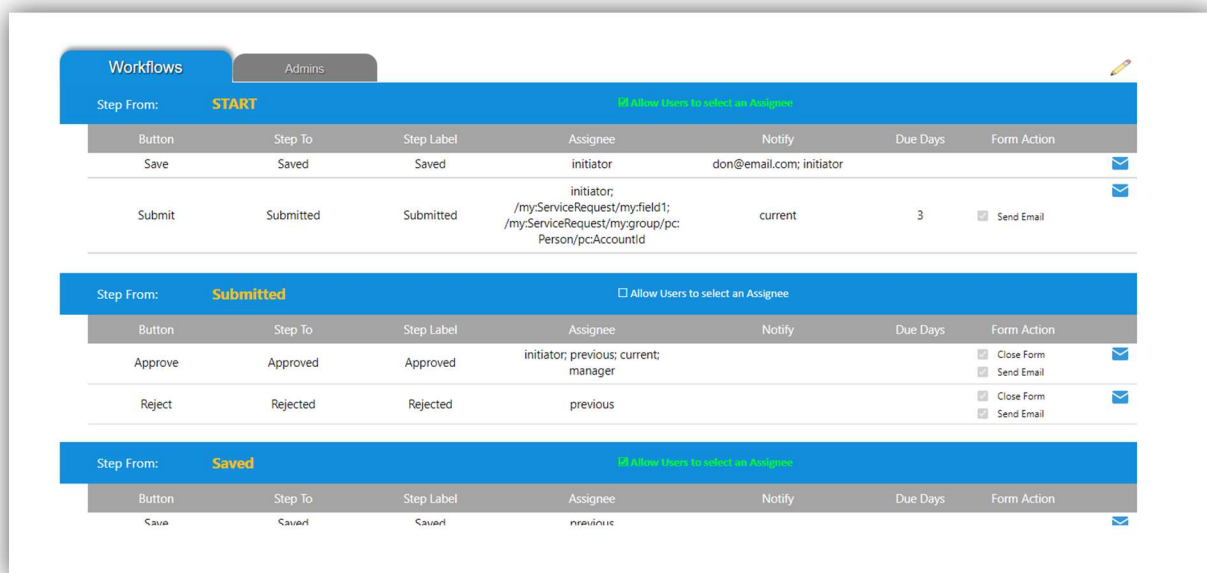
Don't have the Authy App?

TEXT ME A CODE

This section will appear after Authy sends a verification code to the external user's mobile number.

Config Form

Along with the package comes a Config Form which allows you to configure our form's workflows and share admin credentials to your users.



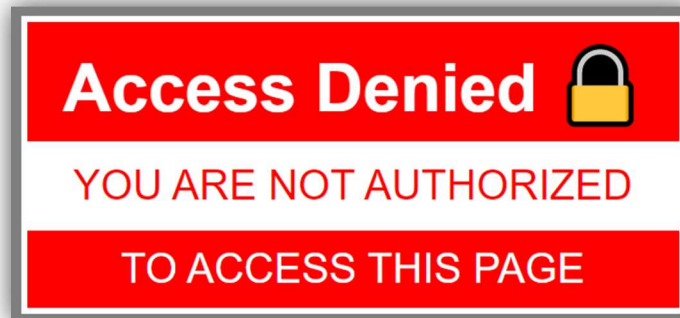
The screenshot displays the 'Workflows' tab of the Config Form. It shows three workflow sections: 'START', 'Submitted', and 'Saved'. Each section has a table of actions and their configurations.

Button	Step To	Step Label	Assignee	Notify	Due Days	Form Action
Save	Saved	Saved	initiator	don@email.com; initiator		
Submit	Submitted	Submitted	initiator; /my/ServiceRequest/my/field1; /my/ServiceRequest/my/group/pc; Person/pcAccountid	current	3	☒ Send Email

Button	Step To	Step Label	Assignee	Notify	Due Days	Form Action
Approve	Approved	Approved	initiator; previous; current; manager			☒ Close Form ☒ Send Email
Reject	Rejected	Rejected	previous			☒ Close Form ☒ Send Email

Button	Step To	Step Label	Assignee	Notify	Due Days	Form Action
Save	Saved	Saved	initiator			

Non-admin users will not be able to access this page and will show:

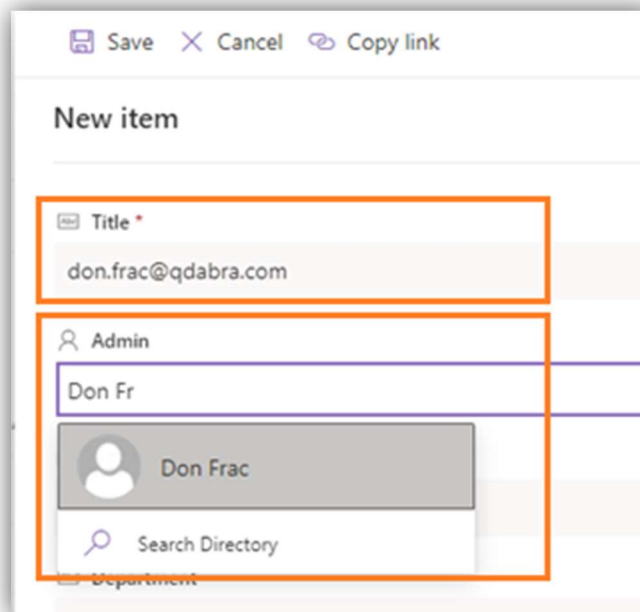


To add yourself as an admin, the initial step is to manually add yourself to the Central Flows Admin.

Proceed to:

https://<YourSite>.com/<YourSubsite>/CentralFlows_ShP/Lists/Central%20Flows%20Admins/

Click +New and manually add yourself as an admin:

A screenshot of a SharePoint "New item" form. At the top are buttons for "Save", "Cancel", and "Copy link". The form has a title "New item". Below it is a "Title" field with the value "don.frac@qdabra.com". Below that is an "Admin" field with the value "Don Fr". Below the "Admin" field is a dropdown menu showing a selection for "Don Frac" with a user icon. At the bottom is a "Search Directory" field. The "Title" and "Admin" fields are highlighted with orange borders.

When done, assuming you that have already added the Central Flows XTP on to your form/s (if not, kindly do so), open up your form which has the Central Flows XTP configured and click on the  Admin icon located at the upper right corner of your form.

This should open up the Config Form and allow you to configure your form's workflow.

The Workflow Steps table is provided in this section to show all the available workflow steps for the specific form opened. The table allows for creating/updating/deleting workflow steps. Click on the pencil icon to proceed.

Managing Workflow Steps and Assignees

Workflow Steps

Admins can control the approval steps in which a form should go through by adding/updating/deleting any of the following values in the Workflow Steps table:

Workflow Data	Description	Possible Values
Step From	pertains to the current status of the form	New, Saved, Submitted, Approved, Rejected, or any value the workflow requires.
Button	for setting the button labels. One Step From can have multiple Button values	Save, Submit, Approve, Reject, Deny, or any value the workflow requires.
Step To	for setting the next status of the form once a specific button is clicked	Saved, Submitted, Approved, Rejected, Closed, or any value the workflow requires.
Step Label	for setting the status label for the form status. The purpose of this data is to provide an easy to understand status to the user because sometimes you may need to add more than one level of approval. If so, you may name the "approve" status for the 1 st level as "Approved1", "Approved2" for 2 nd level and so on. In this case, we don't want the form to display the status as "Approved1", we want it to be displayed as meaningful as possible, like "Approved (1 st Level)".	Saved, Submitted, Approved, Rejected, Denied, Approved1 (for first level approval), Rejected1, etc.
Assignee/Notify	the person/group to which the form is assigned to or notifies. A notification will be sent to the designated assignee/notify person.	Dynamic (dropdown control): previous, current, manager, initiator Static: Email such as john.doe@email.com XPath expression: /my:Form/my:Info/my:Customer any whole number
Due Days	number of days after the form's status is updated when approval is considered overdue. A notification email will be sent to the assignee when the form approval is already overdue.	

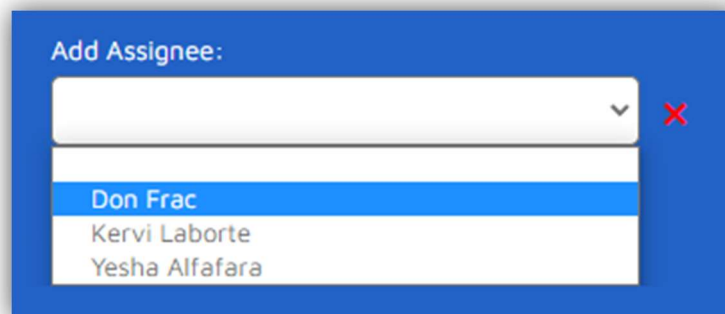
Dynamic Assignees: Initiator, Previous, Current, and Manager

The XTP is designed to retrieve Assignee values from the Approvals List. An admin can have the following fixed dynamic values in the Assignee column:

- "initiator" – form will be assigned to the user who created the form/request
- "previous" – form will be assigned to the previous assignee
- "current" – form will be assigned to the current assignee
- "manager" – form will be assigned to the manager of the current assignee

Allow users to select an assignee

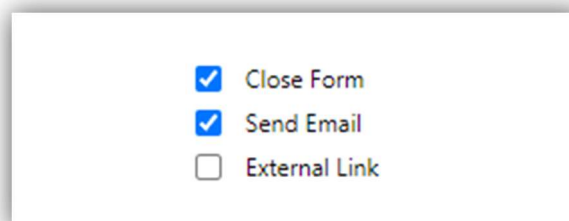
Selecting this option, as it says, allows yours to select or add an assignee via a dropdown control displayed at the task pane:



The values from this dropdown control comes from the Central Flows User list – added via Authy, which we can reconfigure for you to suit your form's needs.

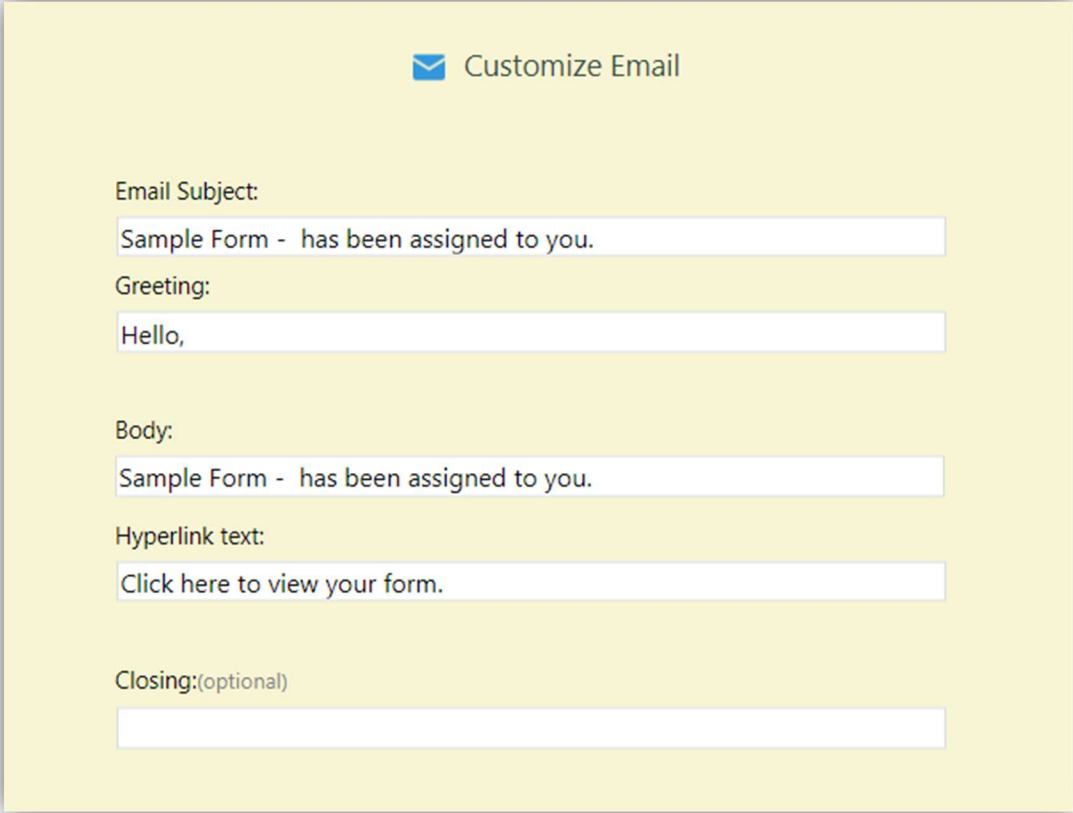
Form Actions: Close Form, Send Email, External Link

- Close Form – deselecting this option leaves the form open after clicking an action button.
- Send Email – this allows you to enable/disable the send email action when clicking an action button.
- External Link – enabling this option provides an external link in the email notification for non-logged in users.



Customize Email

Clicking the Email icon  opens up a window which allows you to configure your notification email's contents. Default values are already provided:



The screenshot shows a yellow dialog box titled "Customize Email" with a blue envelope icon. It contains five text input fields with the following labels and default values:

- Email Subject:** Sample Form - has been assigned to you.
- Greeting:** Hello,
- Body:** Sample Form - has been assigned to you.
- Hyperlink text:** Click here to view your form.
- Closing:(optional)** (empty field)

The Two-Factor Authentication Process (via Authy)

A two-factor authenticator called Authy is integrated in the Approval Workflow XTP to allow external users to access forms. Authy is an app that can add an additional layer of protection to your forms and at the same time allow the use of the form without the need of SharePoint accounts.

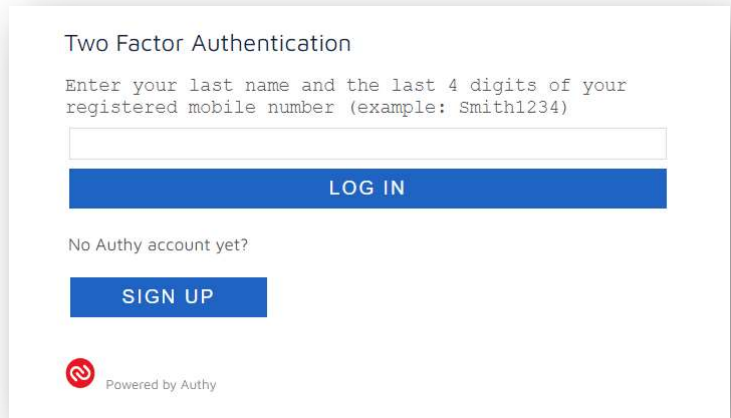
Authy authenticates the external user by sending a text message that contains the verification code. Once the user provides the correct verification code, he'll be able to access the form.

Note: In order to activate this feature in the XTP, you need to configure your Authy API key in the XTP. Open the XTP to see the instructions on how to obtain the Authy API key.

Here is the list of actions on how to use Authy to access forms.

1. Register

- a. To register, user must click the **Sign up** button from the initial Authy screen



Two Factor Authentication

Enter your last name and the last 4 digits of your registered mobile number (example: Smith1234)

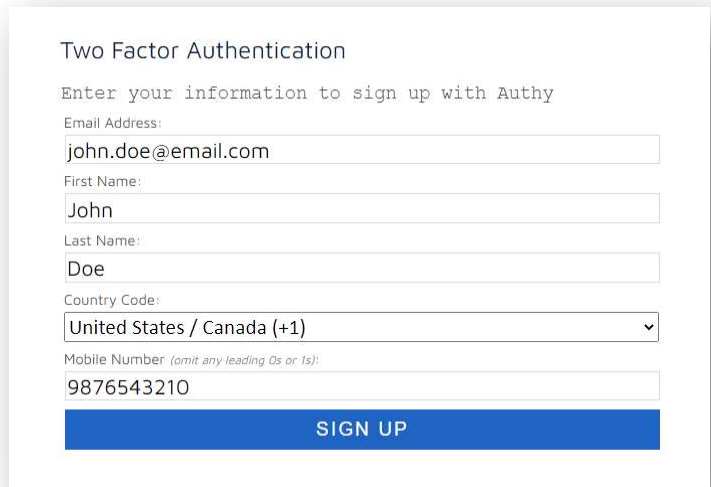
LOG IN

No Authy account yet?

SIGN UP

 Powered by Authy

- b. Fill out the required fields and click **Sign up**.



Two Factor Authentication

Enter your information to sign up with Authy

Email Address:

First Name:

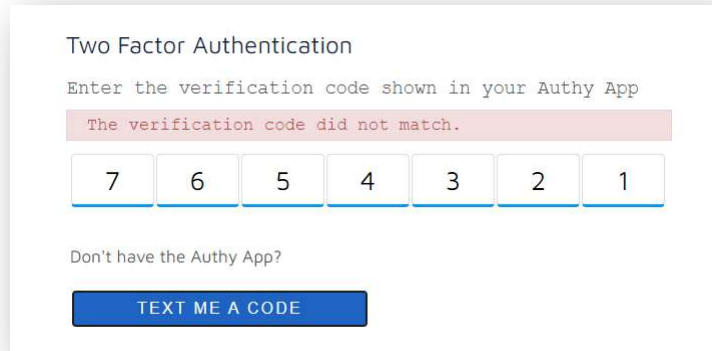
Last Name:

Country Code:

Mobile Number (omit any leading 0s or 1s):

SIGN UP

- c. A text message with the verification code will be sent to the external user's mobile phone. User must enter it in the verification code box below. Alternatively, the user can use the Authy app to generate the verification code by clicking the **Use Authy App** button.



Two Factor Authentication

Enter the verification code shown in your Authy App

The verification code did not match.

7 6 5 4 3 2 1

Don't have the Authy App?

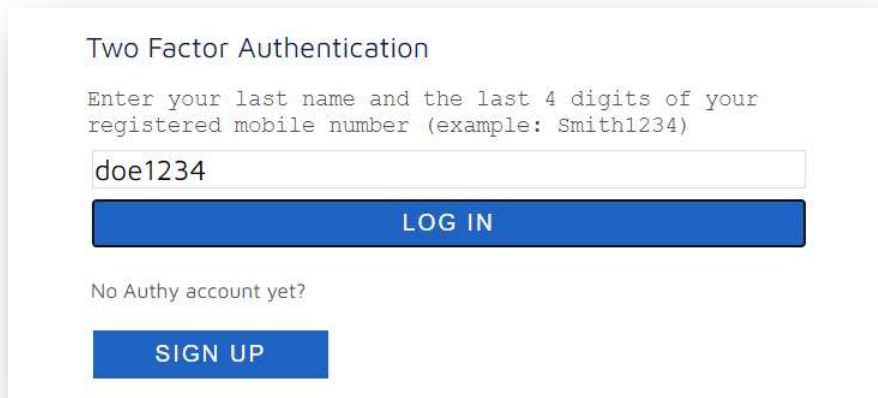
TEXT ME A CODE

- d. Once successful, the external user will now be able to access the form.

2. Sign in

- a. The external user can sign in when he has already registered. The initial screen lets the user sign in using the combination of:

last name + last 4 digits of mobile phone number



Two Factor Authentication

Enter your last name and the last 4 digits of your registered mobile number (example: Smith1234)

doe1234

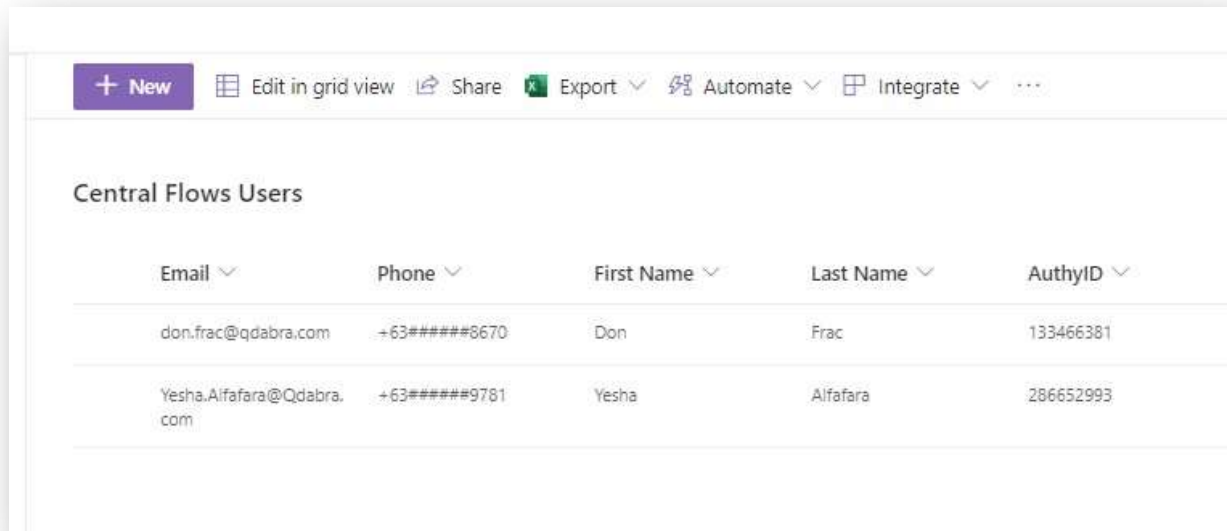
LOG IN

No Authy account yet?

SIGN UP

- b. If the user typed in the correct combination, the form would let the user access the form.

Note: Details of the registered users can be seen in the Users SharePoint list:



+ New Edit in grid view Share Export Automate Integrate				
Central Flows Users				
Email	Phone	First Name	Last Name	AuthyID
don.frac@qdabra.com	+63#####8670	Don	Frac	133466381
Yesha.Alfajara@Qdabra.com	+63#####9781	Yesha	Alfajara	286652993

The Central Flows Dashboard

A separate help section is provided for the dashboard. You can find the help section by opening the dashboard in FormsViewer. Here's how the help section looks like:

HELP

- **My Forms** tab displays forms submitted by the current user.
- **My Assignments** tab displays forms assigned to the current user.
- Click the  edit icon to add a new note - populate the free text field and click  save button to save your notes, or click  undo button to cancel.
- Click the Expand and Collapse ( and ) to display workflow history.
 - Under the Workflow History section, an item having a ☒ ticked checkbox signifies that the notes/comments were generated from the dashboard. Otherwise, it came from the form itself.
- Click the  refresh button to refresh the current items.
- **Show All** tab displays all forms.

My Forms (14)								
Central Flows Testing (1)								
Task ID	Form Name	Assigned To	Status Label	Status	Due Date	Date Modified	Modified By	Notes
> 68	Central Flows Testing_DonFrac_210608083455	Yesha Alfajara, Don Frac;	Saved	New		06/08/2021 3:34 PM	Don Frac	Auto Saved - 06/17/2021 - 5:55 AM - User: Don Frac

LibraryTest1 (1)								
Task ID	Form Name	Assigned To	Status Label	Status	Due Date	Date Modified	Modified By	Notes
> 20	LibraryTest1_DonFrac_210604035401	Don Frac;	Saved	Saved		06/04/2021 10:54 AM	Don Frac	Auto Saved - 06/04/2021 - 5:51 AM - User: Don Frac

Need help with this document?

Contact Support@Qdabra.com