PNMSOFT

a **GENPACT** *company*

PNMsoft Knowledge Base

Sequence Administrator Guides

Flowtime Website Configuration

PNMsoft UK 38 Clarendon Road Watford Hertfordshire WD17 1JJ

Tel: +44(0)192 381 3420 • Email: info@pnmsoft.com • Website: www.pnmsoft.com

Microsoft Partner

Gold Application Development

TABLE OF CONTENTS

Introduction

The **Flowtime Website** enables you to provide the Flowtime functionality and experience to end users without having to install SharePoint.

It provides the option to add and edit pages quite easily, without the need to compile, as this is a website.

This document describes configuration options for the Flowtime Website.

Getting Oriented Around the Flowtime Website

For end users, the Flowtime Website functions very similarly to a standard SharePoint-based Flowtime environment, with minimal differences in layout and appearance.

You can navigate to each page using the top links. Here are some examples of pages:

Homepage

Inbox

Delegations

HotOperations

Note: From v8.2 and higher, Flowtime Website supports HotOperations.

You can easily add and edit pages, but first, it's important to understand the file structure behind the site, as detailed in the following section.

Understanding the File Structure

Once installed, there are several files that will help you configure and edit the Flowtime Website. These are listed below:

web.config

The Flowtime web.config file enables you to control the Flowtime Website settings such as culture Theme, database connection and more.

For example, you can set the Flowtime Website language by editing this key:

```
<globalization culture="en-US" uiCulture="en-US" requestEncoding="utf-8"
responseEncoding="utf-8" fileEncoding="utf-8" />
```

ASPX files

These files define the appearance and functionality of each page on the Flowtime Website. E.g. Inbox.aspx defines the Inbox page. See the sections below for how to edit or add pages to the site.

Control Template files

Location: *[Site Physical path]\CONTROLTEMPLATES\Flowtime*

The Flowtime site is assembled from pages that host the user controls. E.g. UserMessagesGridControl.ascx is used to display the User Messages grid.

Default.config

Location:
C:\Program Files\PNMsoft\Shared Resources\Components\Flowtime\Config\Portal\Commands

This file defines the top menu links in the Flowtime Website. Here you can edit links, set the URL of each link and add links to new pages where needed.

ServiceMetadata config files

Location:
C:\Program Files\PNMsoft\Shared Resources\Components\Flowtime\Config\ServiceMetadata

This set of config files define the columns display of each grid.

For example, the Messages grid columns setting is defined in MessagesServiceMetadata.**Portal**.Config

The files with the word "Portal" in their name are the files that define grids in the Flowtime Website.

Note: This folder also contains standard SharePoint version config files for each web part, for your reference, but they do not affect the Flowtime Website.

Editing the Site

You can easily add pages, edit pages and make other appearance and functionality changes to the Flowtime Website. This is done by editing the files in the file structure as required by your solution. This section includes some common examples.

Adding a New Page

1. Create an ASPX file in the site root folder.
2. Rename the file: e.g. MyPage.aspx.
3. Open and edit the file.

   Here is an example, where we display the Group Messages Grid control and Form Viewer control on the new page 'MyPage.aspx'. The Form Viewer control enables you to add any form view to a page without referencing a specific process (added sections are highlighted below).

   For the controls to work it is necessary to add a Register tag for each control on the page that you add (these links can be found in the Flowtime Application in the IIS):

```
<%@ Page Title="" Language="C#" MasterPageFile="~/LAYOUTS/Masters/Portal.Master"
CodeBehind="Default.aspx.cs"
Inherits="PNMsoft.Sequence.Runtime.Web.UI.Pages.Default" AutoEventWireup="true"
%>
<%@ Register TagPrefix="sq" TagName="GroupMessagesGridControl"
    Src="~/_controltemplates/Flowtime/GroupMessagesGridControl.ascx" %>
    <%@ Register TagPrefix="sq" TagName="FormViewerControl"
    Src="~/_controltemplates/Flowtime/FormViewerControl.ascx" %>
<asp:Content ID="Content" ContentPlaceHolderID="content" runat="server">
    <div class="sqpt-container">


        <div class="sqpt-grid-control">
            <sq:GroupMessagesGridControl ID="GroupMessagesGridControl"
PageSize="5" DisplayVariables="false"
                runat="server" />
        </div>


        <sq:FormViewerControl ID="ReportsView"
FormVirtualPath="~/SequenceForms/wf/Test/Test/Form1/DefaultView.ascx"
                runat="server" />
    </div>
</asp:Content>
```

Important: If you need to add your own code behind for the page, you must inherit from the PortalBasePage class from PNMsoft.Sequence.Runtime.Web.UI dll.

Add a New Link to the Top Commands

Let's say you have created the new page: MyPage.aspx, and you would now like to add a link to that page on the top menu.

Follow these steps:

1. Open the file Default.config.

2. Copy a MenuItem section and paste it below the existing MenuItem sections. E.g.:

```
<MenuItem
    Id="Inbox"
    Command="Inbox"
    Text="{$resources.Inbox}"
    Tooltip="{$resources.Inbox}">
</MenuItem>
```

3. Edit the values in the MenuItem section as follows:

```
<MenuItem
    Id="MyPage"
    Command="MyPage"
    Text="My Page"
    Tooltip="MY Page">
</MenuItem>
```
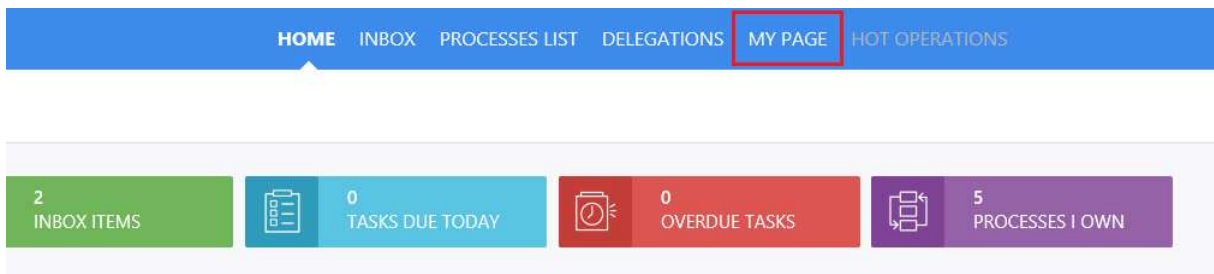
4. Copy a NavigateToUrlCommand section and paste it below the existing NavigateToUrlCommand section. This section determines the URL of the link. E.g.:

```
<NavigateToUrlCommand
    Id="Inbox"
    Url="~/Inbox.aspx?MessageInstanceViewType=2">
</NavigateToUrlCommand>
```

5. Edit the values in the NavigateToUrlCommand section as follows:

```
<NavigateToUrlCommand
    Id="MyPage"
    Url="~/MyPage.aspx">
</NavigateToUrlCommand>
```

6. Perform IIS Reset, and refresh the Homepage. The new link will appear in the Top Menu.

New Link Added to Top Menu

Editing an Existing Page

1. Duplicate the aspx file of the page you want to edit in the site root folder. For example, Duplicate Inbox.aspx to **MyPage.aspx**

2. Edit the file as needed. E.g. you can add a new user control to Inbox.aspx (added sections are highlighted), or change the control properties.

```
<%@ Page Title="" Language="C#" MasterPageFile="~/Layouts/Masters/Portal.Master"
MenuId="Portal" SelectedMenuItemId="MyPage" AutoEventWireup="false"
EnableViewState="false" CodeBehind="Inbox.aspx.cs"
Inherits="PNMsoft.Sequence.Runtime.Web.UI.Pages.Inbox" %>
<%@ Register TagPrefix="sq" TagName="InboxSummaryControl"
    Src="~/_controltemplates/Flowtime/InboxSummaryControl.ascx" %>
<%@ Register TagPrefix="sq" TagName="NewProcessControl"
    Src="~/_controltemplates/Flowtime/NewProcessControl.ascx" %>
<%@ Register TagPrefix="sq" TagName="ProcessesIOwnControl"
    Src="~/_controltemplates/Flowtime/ProcessesIOwnControl.ascx" %>
<%@ Register TagPrefix="sq" TagName="UserMessagesGridControl"
    Src="~/_controltemplates/Flowtime/UserMessagesGridControl.ascx" %>
<%@ Register TagPrefix="sq" TagName="GroupMessagesGridControl"
    Src="~/_controltemplates/Flowtime/GroupMessagesGridControl.ascx" %>
<asp:Content ID="Content" ContentPlaceHolderID="content" runat="server">
    <div class="sqpt-container">
        <div class="sqpt-summary-controls">
            <div>
                <sq:NewProcessControl ID="NewProcessControl"
                    runat="server" />
            </div>
            <div>
                <sq:InboxSummaryControl ID="InboxSummaryControl"
InboxPage="Inbox.aspx"
                    runat="server" />
            </div>
            <div>
                <sq:ProcessesIOwnControl ID="ProcessesIOwnControl"
ProcessesIOwnPage="OpenProcesses.aspx" runat="server" />
            </div>
        </div>
        <div class="sqpt-grid-control">
            <sq:UserMessagesGridControl ID="UserMessagesGridControl"
PageSize="30" DisplayVariables="true" ConfigName="Portal"
                runat="server" />
        </div>
        <div class="sqpt-grid-control">
            <sq:GroupMessagesGridControl ID="GroupMessagesGridControl"
PageSize="5" DisplayVariables="false"
                runat="server" />
        </div>
    </div>
```

```
</asp:Content>
```

3. Change the page reference in Default.config

Location:
C:\Program Files\PNMsoft\Shared Resources\Components\Flowtime\Config\Portal\Commands

```
<NavigateToUrlCommand
    Id="Inbox"
    Url="~/CustomInbox.aspx?MessageInstanceViewType=2">
</NavigateToUrlCommand>
```

4. Edit other references as needed for example the Inbox Summary control

Changing the Site Branding

To change the site colors and branding you should create your own theme as follows:

1. Duplicate the Sequence8 folder in *C:\Program Files\PNMsoft\Shared Resources\Themes*

2. Give it a meaningful name e.g. CustomerTheme

3. Apply the required changes to the flowtimesite.css file.

4. Change the Theme key in the web.config to your new folder:

<add key="PNMsoft.Sequence.Flowtime.Theme" value="MyCustomeTheme"/>