

Qfiche Toolkit Custom Workflow Activities

January 2018



Table of Contents

- Summary..... 3
- Installation..... 4
- Registration..... 5
 - Automatic Registration 6
 - Manual Registration 8
- Usage..... 12
- Licensing..... 13
 - Applying a New License Code 14
- Appendix A..... 16
 - Removal 16

Summary

Laserfiche® Workflow activities are single, pre-built, configurable processes. They are the building blocks of workflow definitions. Laserfiche® Workflow extensibility allows for the creation of custom workflow activities to provide functionality that is not natively available in Laserfiche®. Qfiche Toolkit custom workflow activities plug directly into the Laserfiche® Workflow Designer and behave exactly like native workflow activities. Just like native workflow activities, the Qfiche Toolkit custom workflow activities expose appropriate properties that can be modified during the workflow design process.

Installation

The custom workflow activity will need to be installed on the Workflow Server and any workstation that will run the Workflow Designer. If the Workflow Designer will only be running on the Workflow Server itself then the custom workflow activity need only be installed on the Workflow Server.

The login account used to install the custom workflow activity will need to have appropriate Administrative rights to perform the installation.

The installation process begins by unzipping the download from the Qfiche website to a local folder on the Workflow Server and running the setup.msi installer. Follow the setup wizard prompts to step through the installation. Please note the following;

- Document where the setup wizard installs the custom workflow activity. The default installation folder should be a subfolder of the **C:\Qfiche\Toolkit** folder on the Workflow Server.
- The service account that the Workflow Server is running under will need to have full permissions to the installation folder in order to load the custom workflow activity for use.
- If Workflow Designer will be running on the Workflow Server itself then the user account used to login to the server and run Workflow Designer will need to have full permissions to the installation folder as well.

Registration

After installation the custom workflow activity will need to be registered with the Workflow Server and any workstation that will run Workflow Designer.

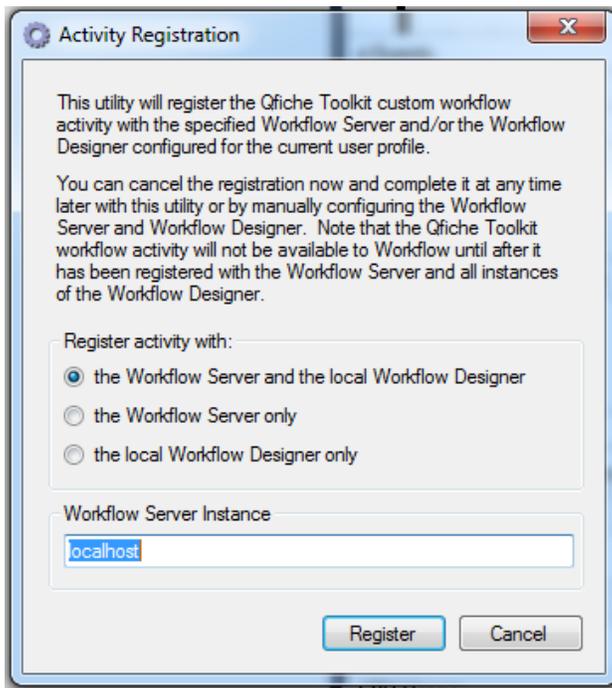
There are two methods to register the activity; automatic registration via the Activity Registration utility, or manual registration via the Workflow Administration Console and each installation of Workflow Designer.

Additional Registration Information:

- The custom workflow activity will not be available to Workflow until after it is registered with the Workflow Server and each installation of Workflow Designer.
- When registering the custom workflow activity with a Workflow Designer installation the registration is user profile specific. If multiple user profiles will be running Workflow Designer then the custom workflow activity will need to be registered under each user login.

Automatic Registration

1. Run the Activity Registration utility by navigating to the installation folder for the custom workflow activity. The default installation folder should be a subfolder of the **C:\Qfiche\Toolkit** folder on the Workflow Server.
2. Double-click the **ActivityRegistration.exe**.



3. Select the type of registration to be performed.
 - If the custom workflow activity is being registered on the Workflow Server and Workflow Designer will also be running on the Workflow Server then select the first option to register the custom workflow activity with both the Workflow Server and Workflow Designer.
 - If the custom workflow activity is being registered on the Workflow Server and Workflow Designer will not be running on the Workflow Server then select the second option to register the custom workflow activity with the Workflow Server only.
 - If the custom workflow activity is being registered on a Workflow Designer workstation then select the third option to register the custom workflow activity with Workflow Designer only.

4. Provide the name of the Workflow Server instance.
 - If the Activation Registration utility is running on the Workflow Server then leave the default instance as **localhost**.
 - If the Activation Registration utility is running on a Workflow Designer workstation then type in the name of the Workflow Server instance.
5. Click **Register** to begin the registration process.
6. Skip to the **Usage** section of these instructions to continue

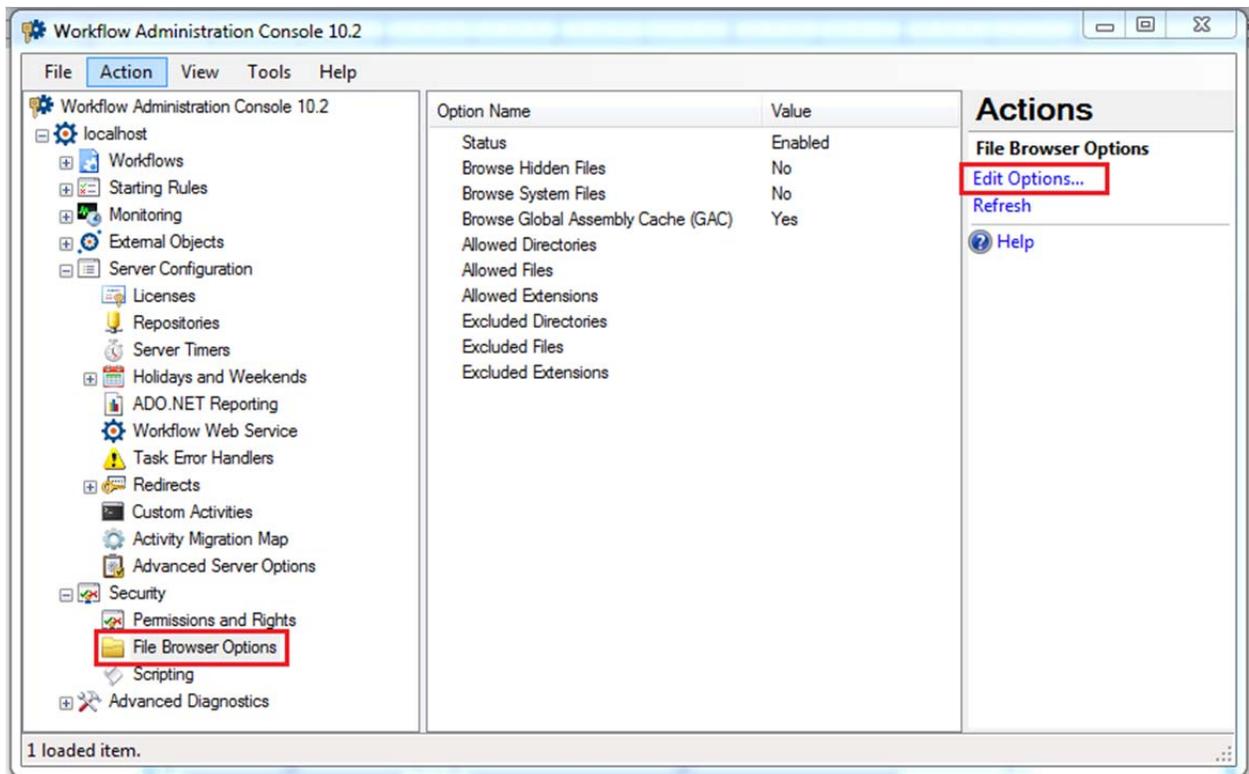
Manual Registration

Manual registration of the custom workflow activity with the Workflow Server is accomplished through the Workflow Administration Console.

Enable File Browsing

Note: File Browsing will need to be enabled to register the custom workflow activity with the Workflow Server. File browsing can be disabled after the custom workflow activity is registered. To enable file browsing in the Workflow Administration Console;

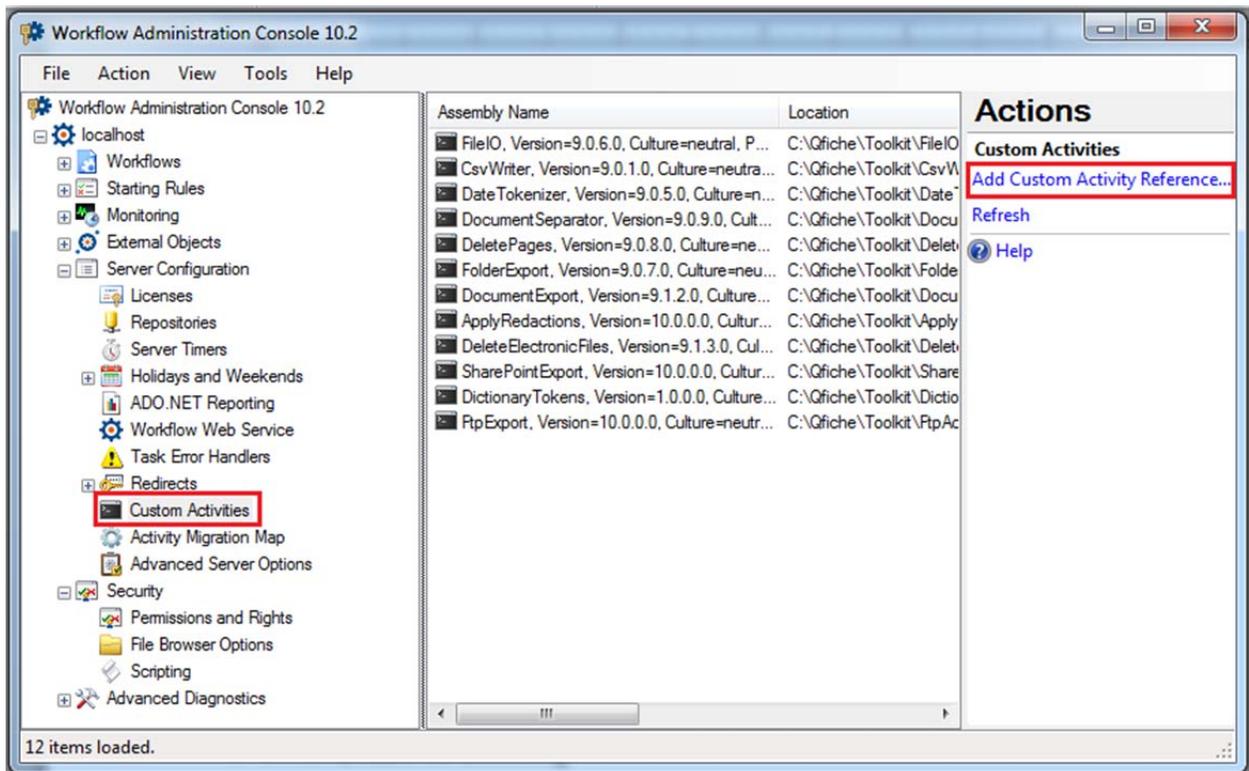
1. Open the **Workflow Administration Console**.
2. Expand the **Security** node.
3. In the Console Pane, select **File Browser Options**.
4. In the Actions Pane, select **Edit Options**.



5. In the **File Browser Options** window, select the **General** tab.
6. Select **Enable file browsing**.
7. Click **OK**.

Registering the Custom Workflow Activity with the Workflow Server

1. Expand the **Server Configuration** node.
2. In the Console Pane, select **Custom Activities**.
3. In the Actions Pane, select **Add Custom Activity Reference...**



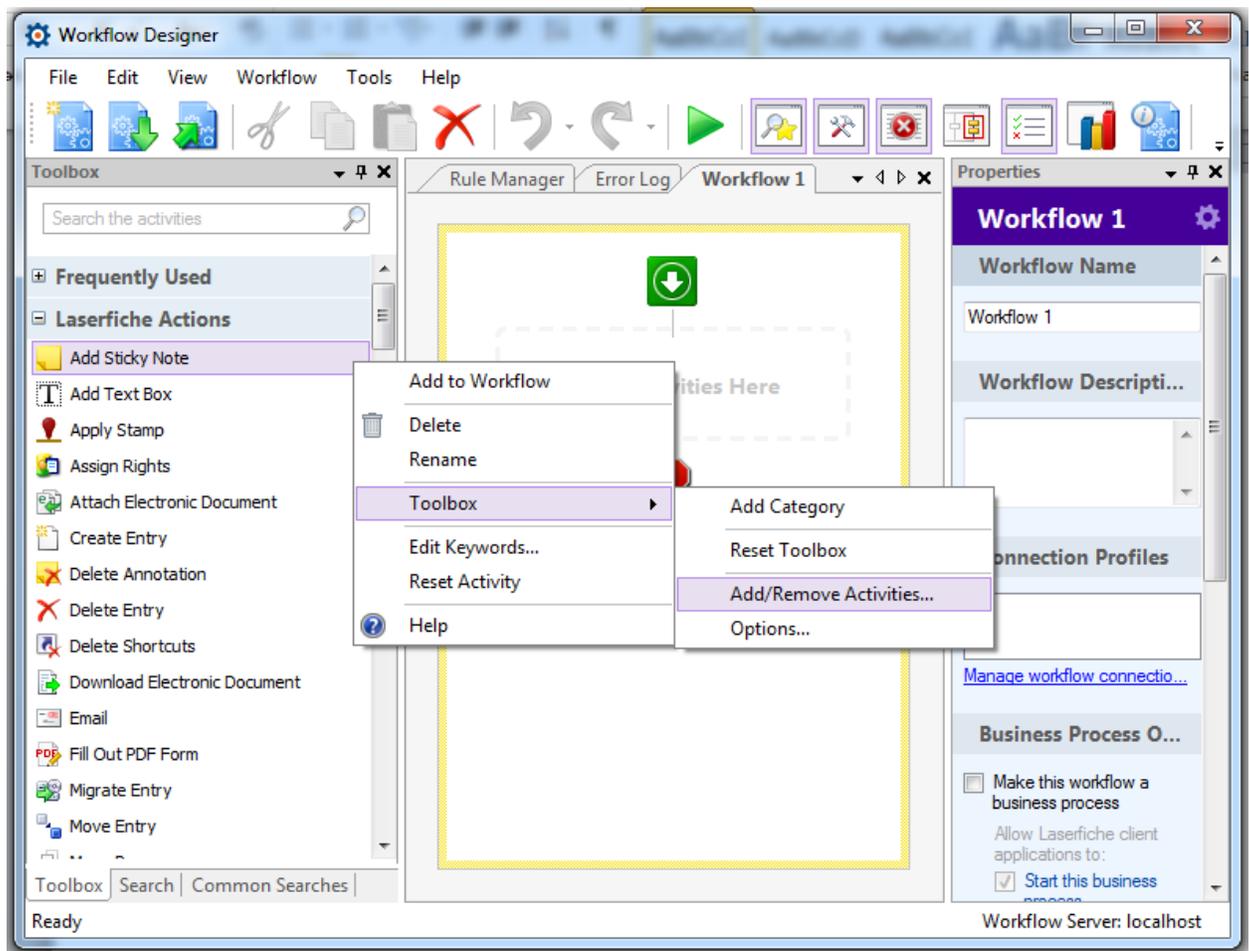
4. In the **Select Assembly** window, browse the Workflow Server's file system to select the assembly file (*.dll) for the custom workflow activity.

Note: Unless a different folder was selected during the installation process the custom workflow activity assembly (*.dll) will be located in the appropriate subfolder of the **C:\Qfiche\Toolkit** folder on the Workflow Server.

Registering the Custom Workflow Activity with the Workflow Designer

Note: The custom workflow activity will need to be registered with each installed instance of the Workflow Designer. Also note that the registration is user profile specific. If multiple user profiles will be running Workflow Designer then the custom workflow activity will need to be registered under each user login.

1. Open the **Workflow Designer**.
2. Right-click in the **Toolbox Pane**.
3. Point to **Toolbox**, and select **Add/Remove Activities...**



4. In the **Add/Remove Toolbox Activities** window, click **Add**.
5. Browse to the location of the custom workflow activity assembly file (*.dll), and click **Open**.
6. Click **OK** to close the **Add/Remove Toolbox Activities** window.
7. Click **OK** at the **Confirm Changes** prompt.

Usage

The custom workflow activity should now be listed in the Toolbox pane in the **Qfiche Toolkit** grouping. At this point the custom workflow activity will behave like any other native workflow activity

1. Double-click on the new activity in the Toolbox pane to add the new custom workflow activity in the Designer Pane or drag/drop the new activity onto the Designer Pane.
2. Select the custom workflow activity in the Designer Pane and modify the properties as necessary.
3. Publish the workflow when completed.

Note: If an evaluation copy of the custom workflow activity was downloaded and installed then the 30 day evaluation period will begin when the activity is added to a workflow in the Designer Pane for the first time.

Licensing

The custom workflow activities available for download from the Qfiche website at www.qfiche.com/products are fully functional 30 day demos.

The 30 day evaluation period begins when the custom workflow activity is added to the Designer Pane of the Workflow Designer for the first time.

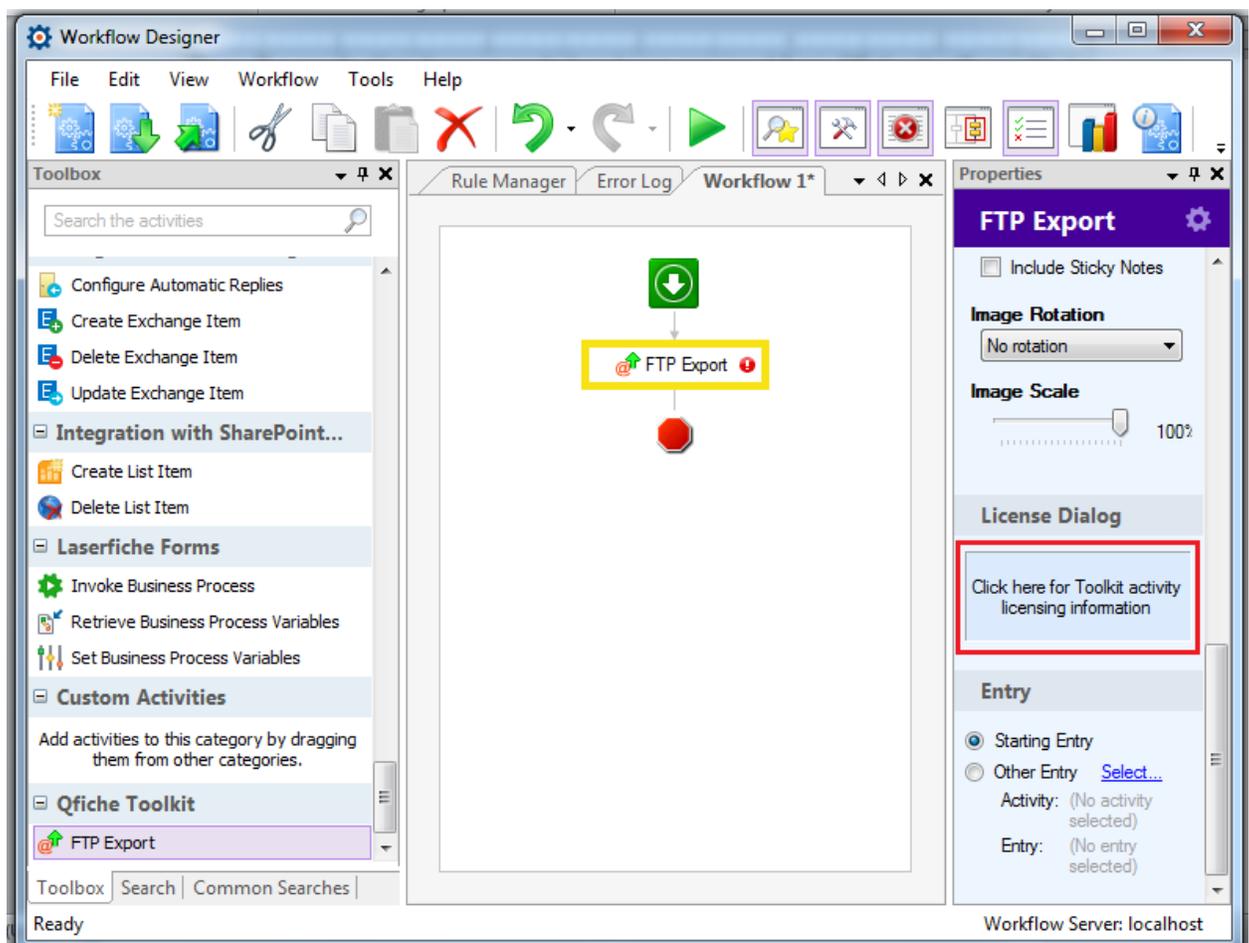
After a decision to purchase the custom workflow activity is reached then use the *Contact Us* page at www.qfiche.com/contact-us to request a production license code. Qfiche will then email the new license code that will unlock the demo activity for full production use.

If one of the free custom workflow activities available from the Qfiche website is being evaluated then follow the same process to request a free license code to unlock the demo activity for full production use.

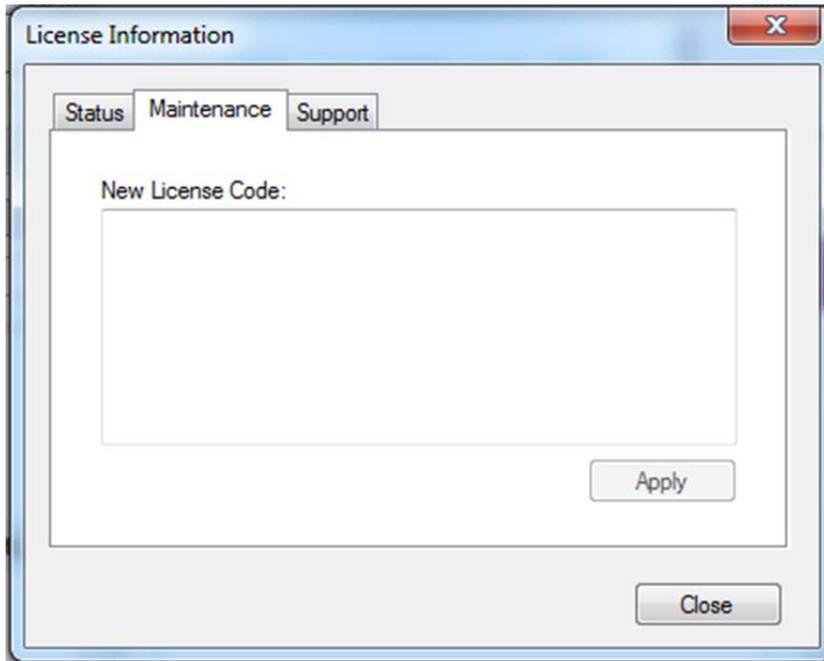
Applying a New License Code

Once the production license code has been received from Qfiche it will need to be applied via the custom workflow activity.

1. Open the **Workflow Designer**.
2. Open a workflow that contains the custom workflow activity and select that activity to view its properties.
3. Select the **License Dialog** property in the Properties Pane to open the license dialog window.



4. Select the **Maintenance** tab on the **License Information** window then copy/paste the new license code into the **New License Code** textbox.



5. Click **Apply** and then **OK** out of any confirmation windows.

The new license activation code should now be in effect.

Appendix A

Removal

The removal of the custom workflow activity is a manual process carried out in reverse order of installation.

1. Remove the custom workflow activity from the Workflow Designer by following the instructions in the **Registering the Custom Workflow Activity with the Workflow Designer** section of the manual registration instructions and selecting the **Remove** option.
2. Remove the custom workflow activity from the Workflow Server by following the instructions in the **Registering the Custom Workflow Activity with the Workflow Server** section of the manual registration instructions and selecting the **Delete** option.
3. Uninstall the custom workflow activity from the server hosting Workflow Server by opening the **Control Panel, Add/Remove Programs**, selecting the appropriate Qfiche Toolkit custom workflow activity installation and selecting **Uninstall**.



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