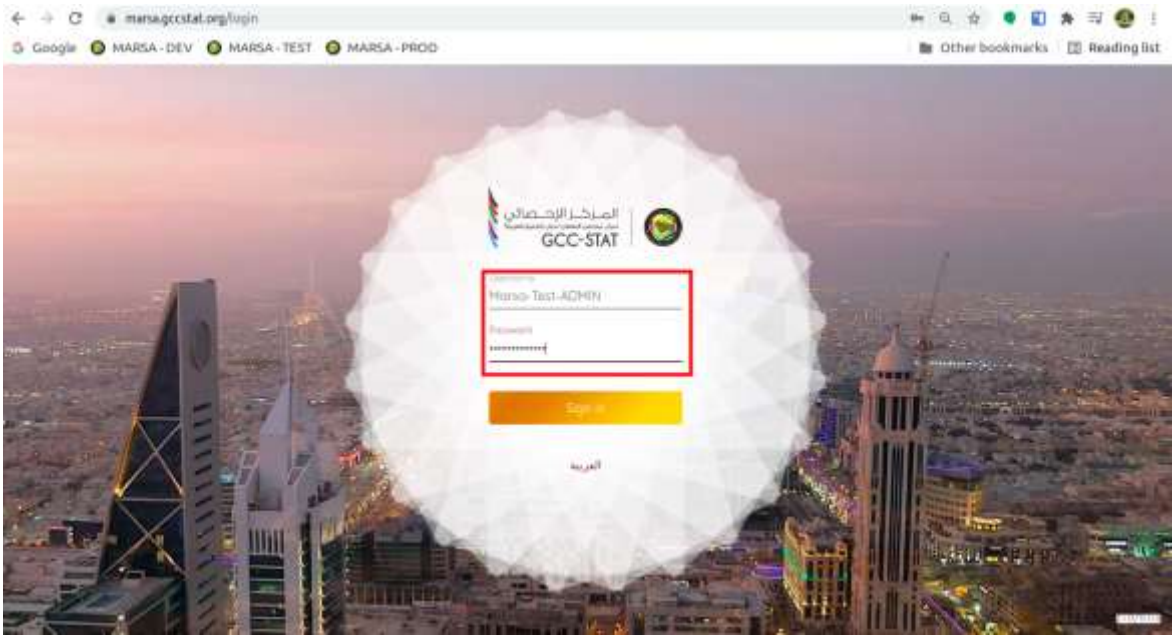
8 BUSINESS PROCESS MANAGEMENT AND CALENDAR PLANNING

8.1 CREATING A WORKFLOW

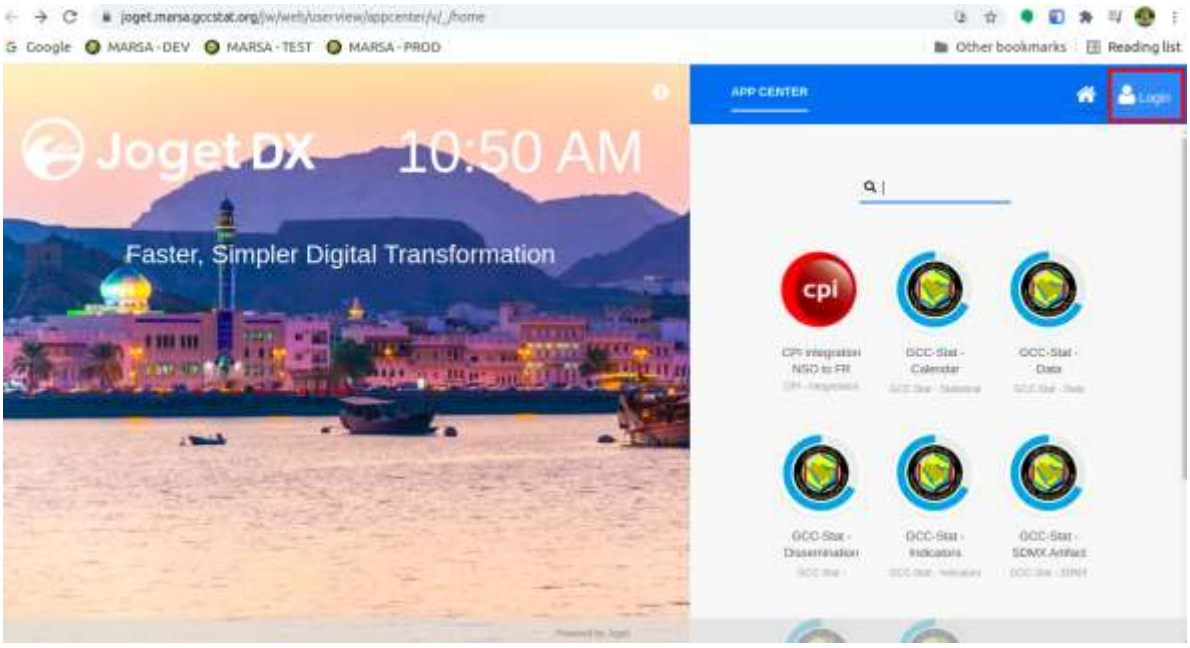
Use case ID	BPM-001
Use case Name	**Creating an application**
Description	Design and develop Application of a business process
Sections/Modules	Business Process Modeling Module
Actors	Admins
Tool	Joget DX
BP related to UC	Data Collection Management (BP-02)
Steps	

1. Go to: https://marsa.gccstat.org/ and log-in to MARSA system as Admin user: Marsa-Test-ADMIN/Gccstat@#2020



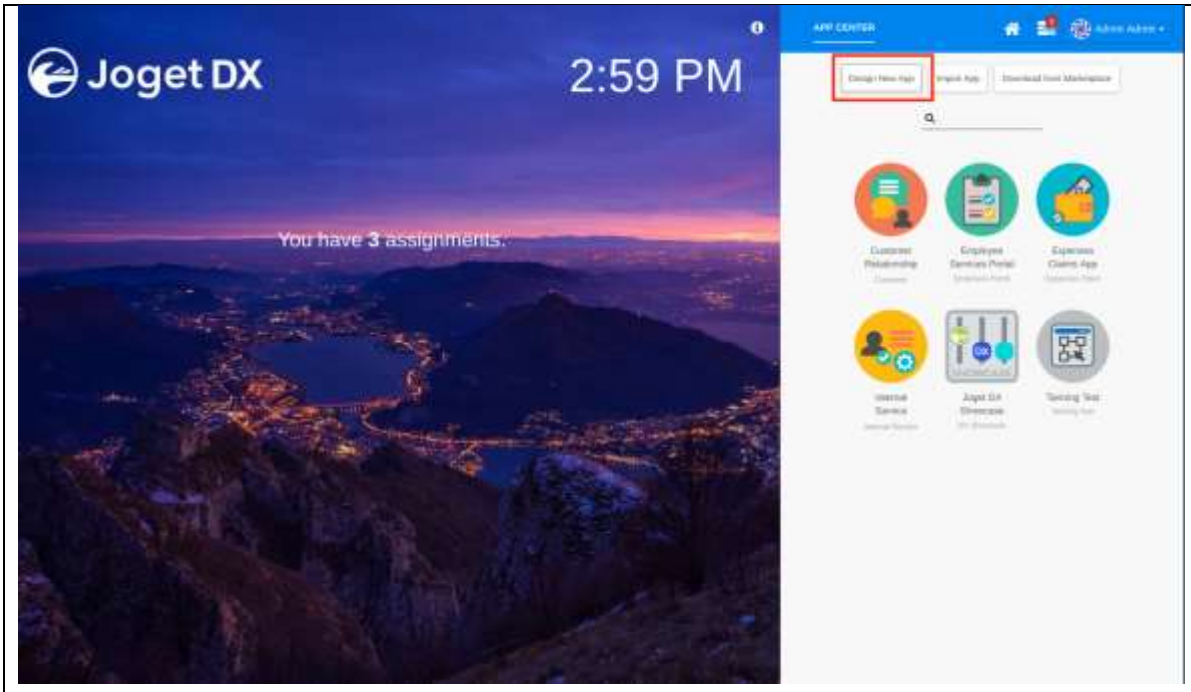
2. Click on the Statistical Processes Modeling tile

3. In JogetDX click Login

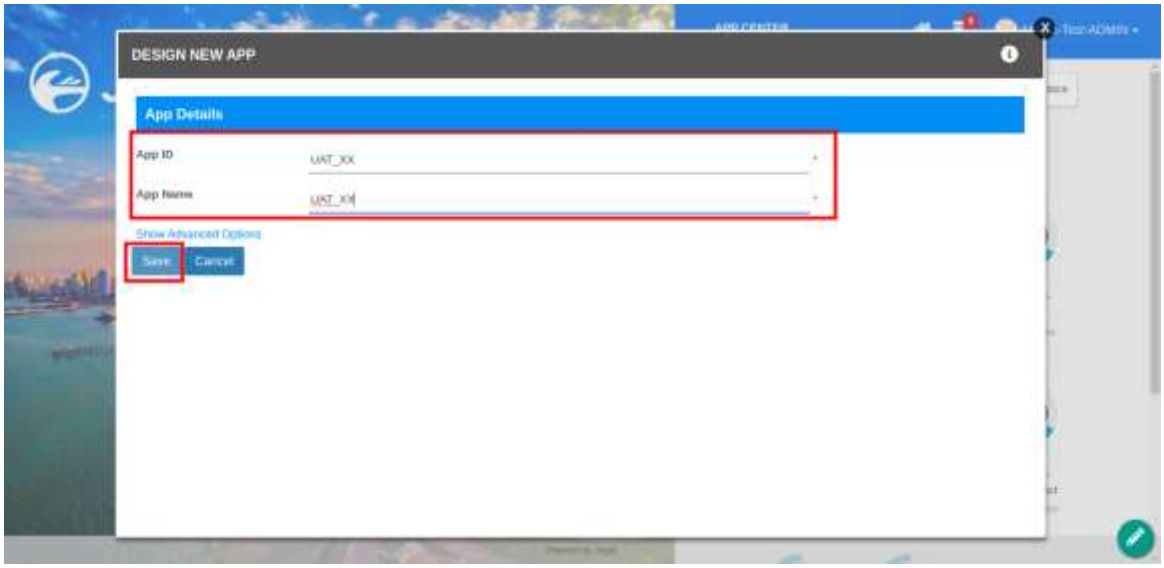


Login using account: Marsa-Test-ADMIN/Gccstat@#2020 (same as in Step 1_

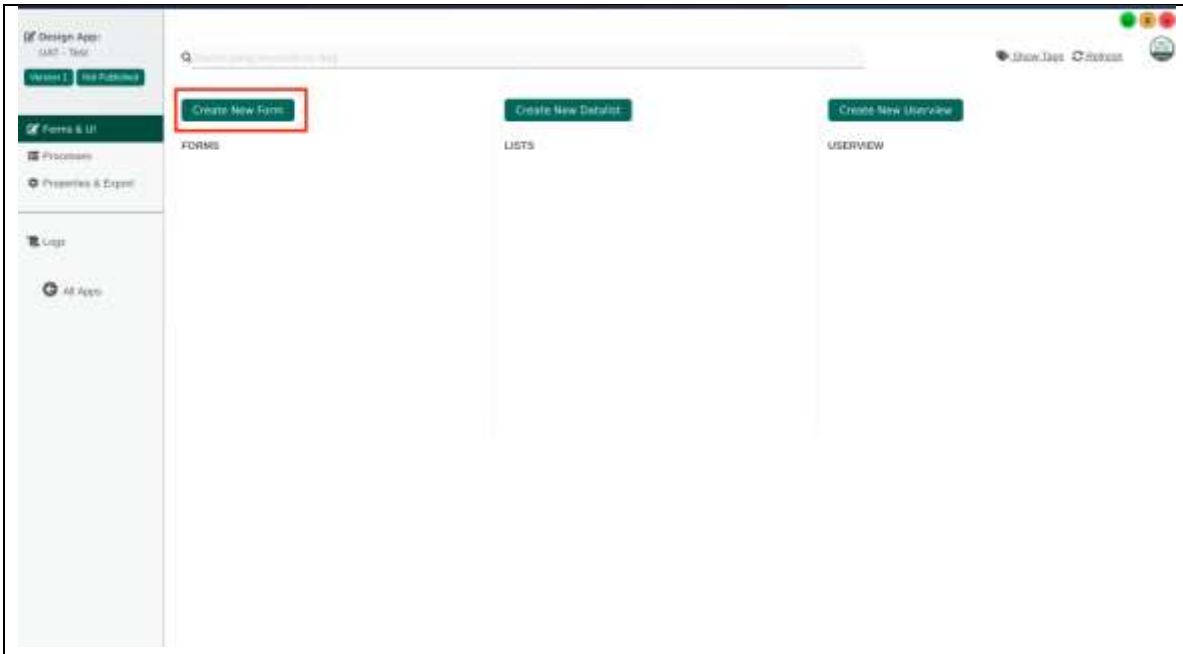
4. Click on Design New App (screen)



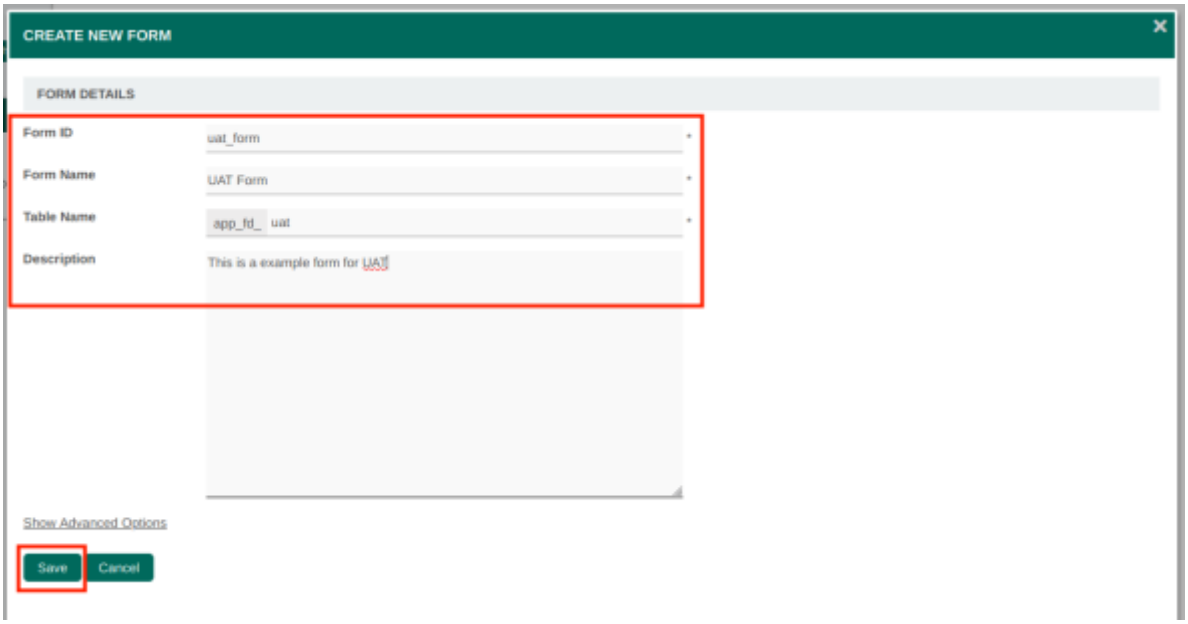
5. Fill the form with App ID and Name and click *Save*
6. Create new Form
    a. Fill the from properties (screen) and click *Save.* As App Id and App name use template: UAT_XX where XX are initials of a user performing test.



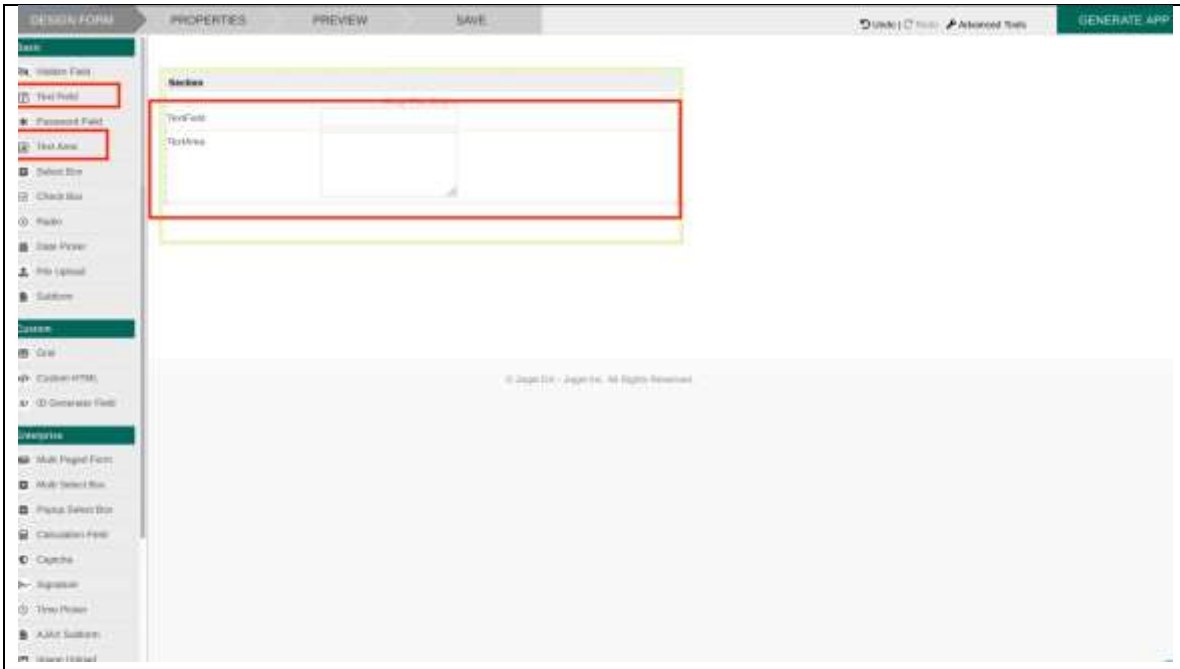
    b. Create new Form



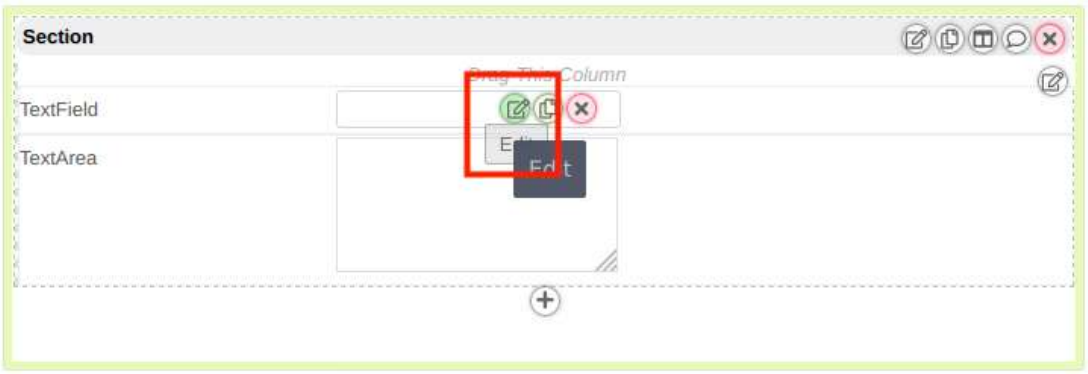
Create new form bu filling the details:
Form ID: uat_form
Form Name: UAT Form
Table name: app_id_uat
Description: This is an example form for UAT



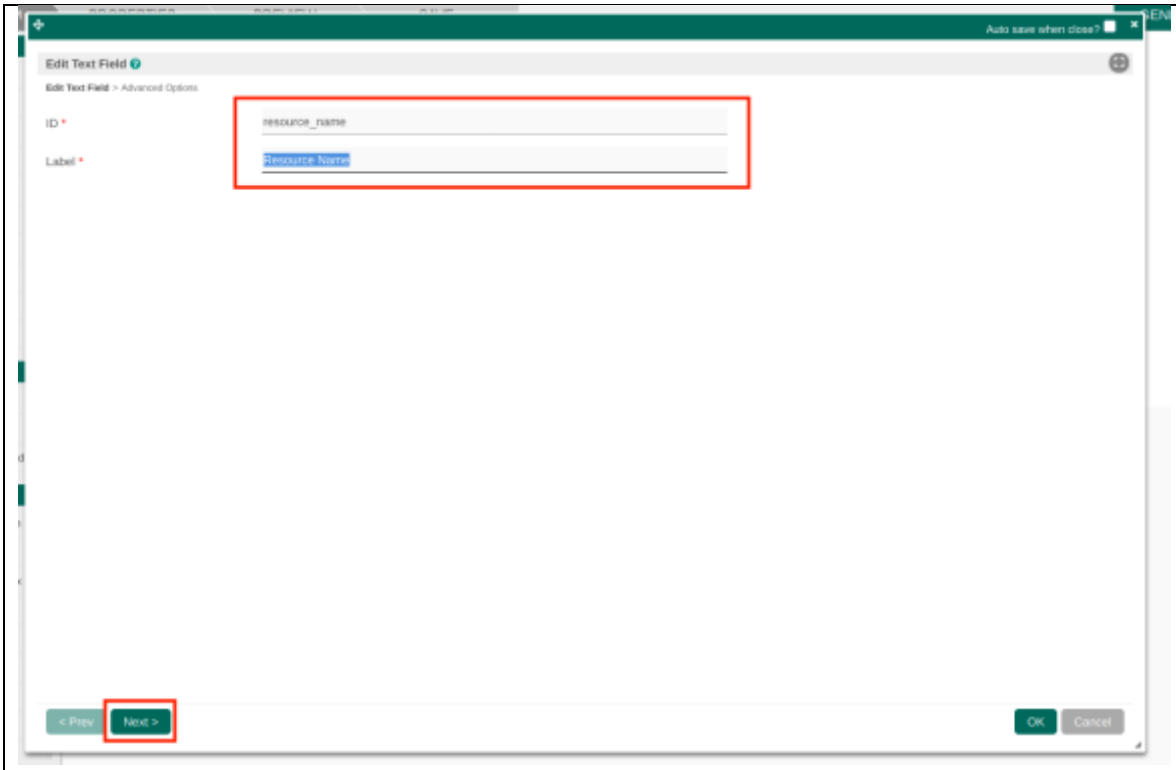
c. Design a form to be filled using drag and drop elements from the left side
d. Add Text Area and Text Field to Section



e. Edit fields added to the form (fill the ID and Label fields)



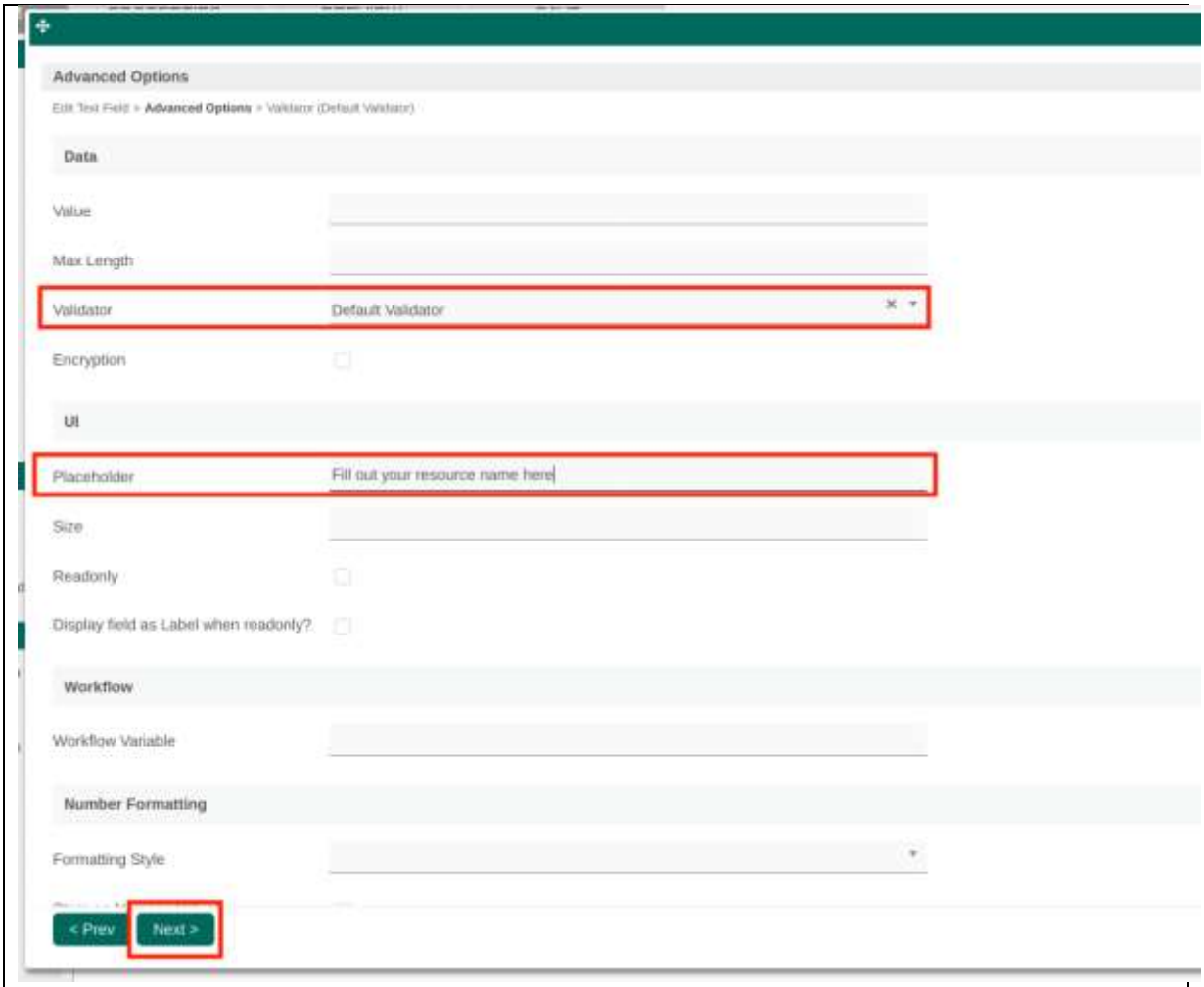
Fill the data for new field with:
ID: resource_name
Label: Resource Name



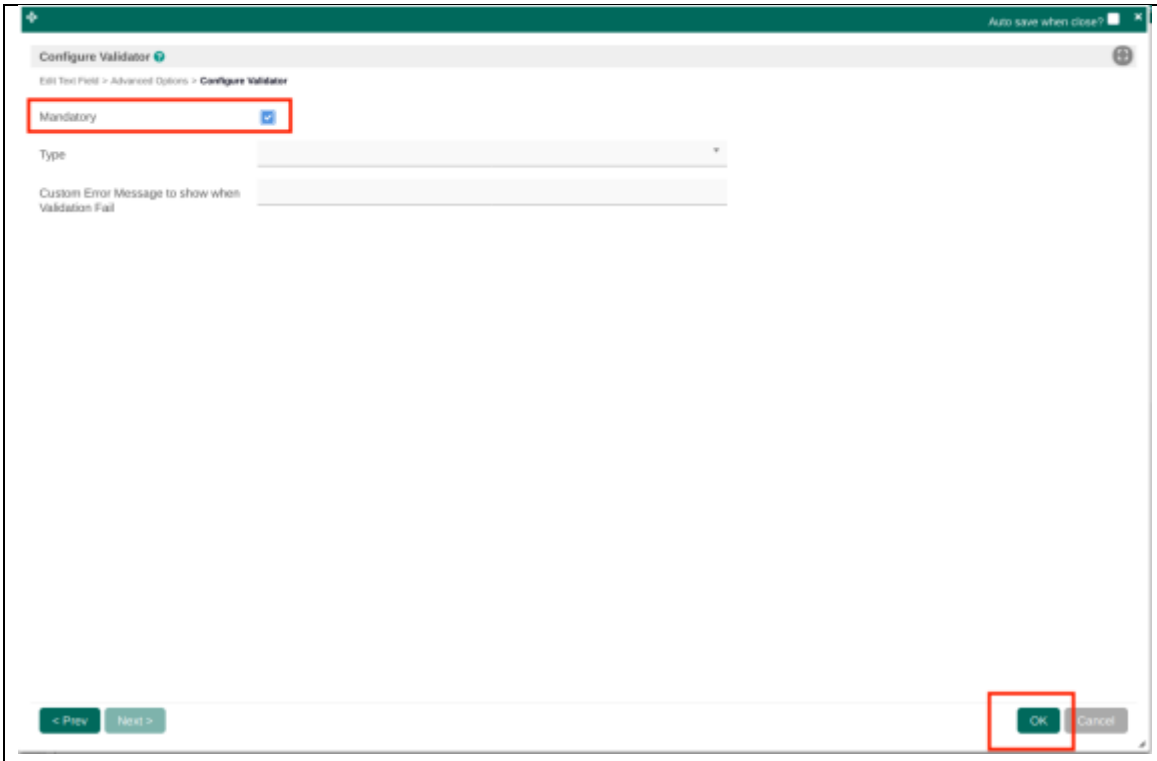
f. Click *Next* and set validator and placeholder

Set Validator to *Default Validator*

And placeholder to: *Fill out your resource name here*



g. Click *Next* and set the field's property to *Mandatory*

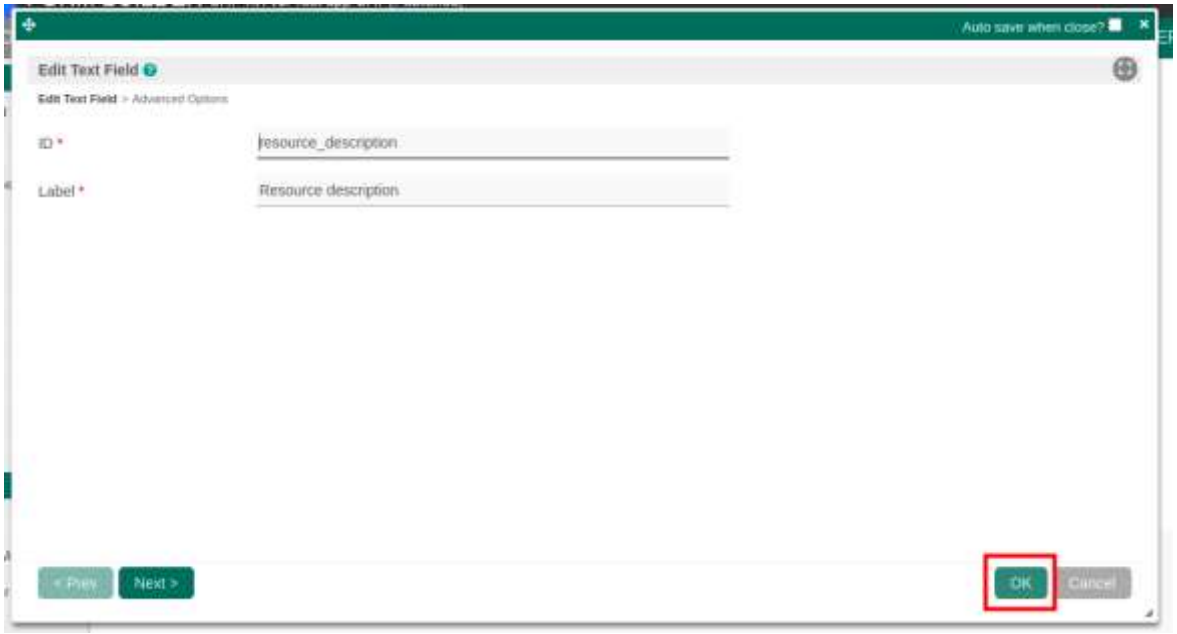


h. Click *OK*

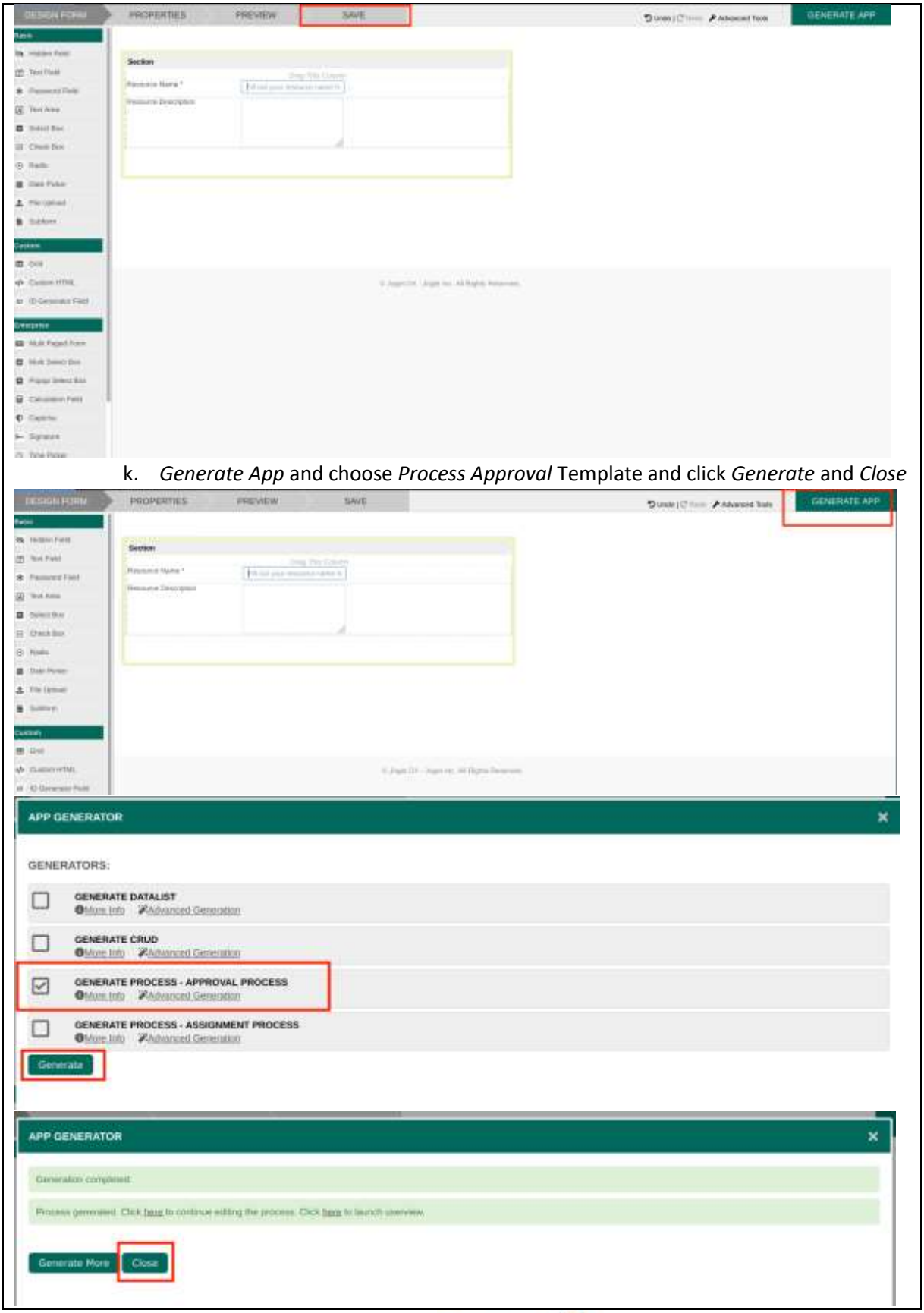
i. Add new field of type *Text Area* and fill its id and label:

ID: resource_description

Label: Resource description



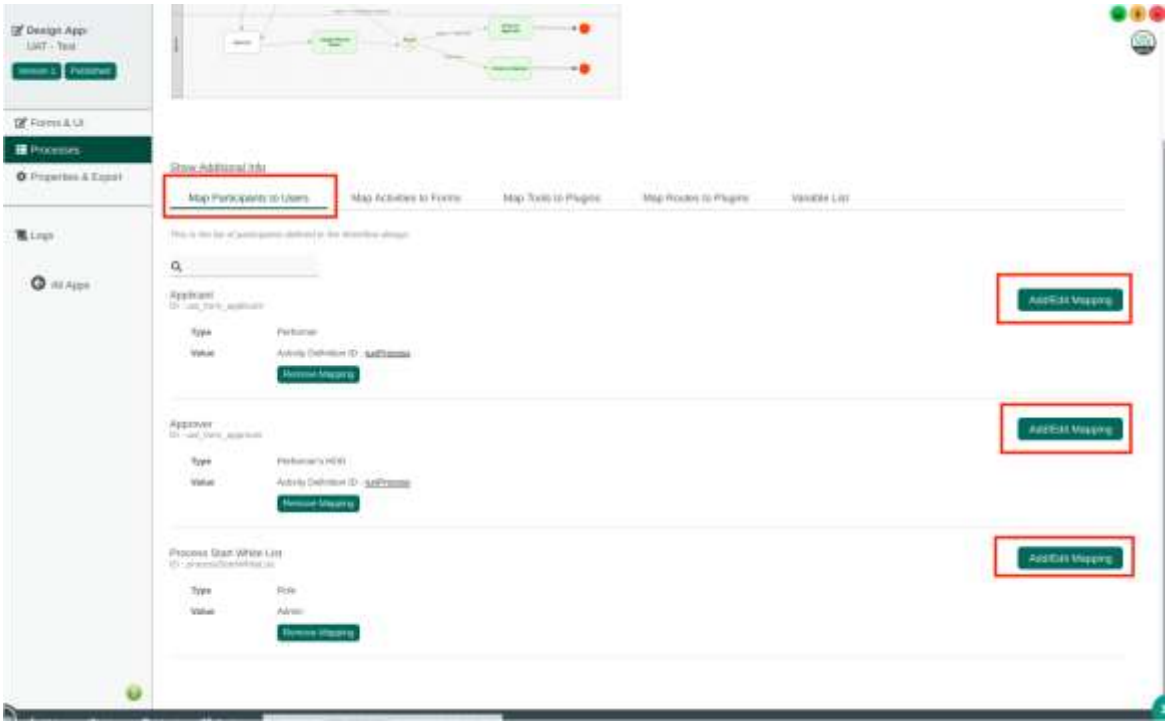
j. Save the Form



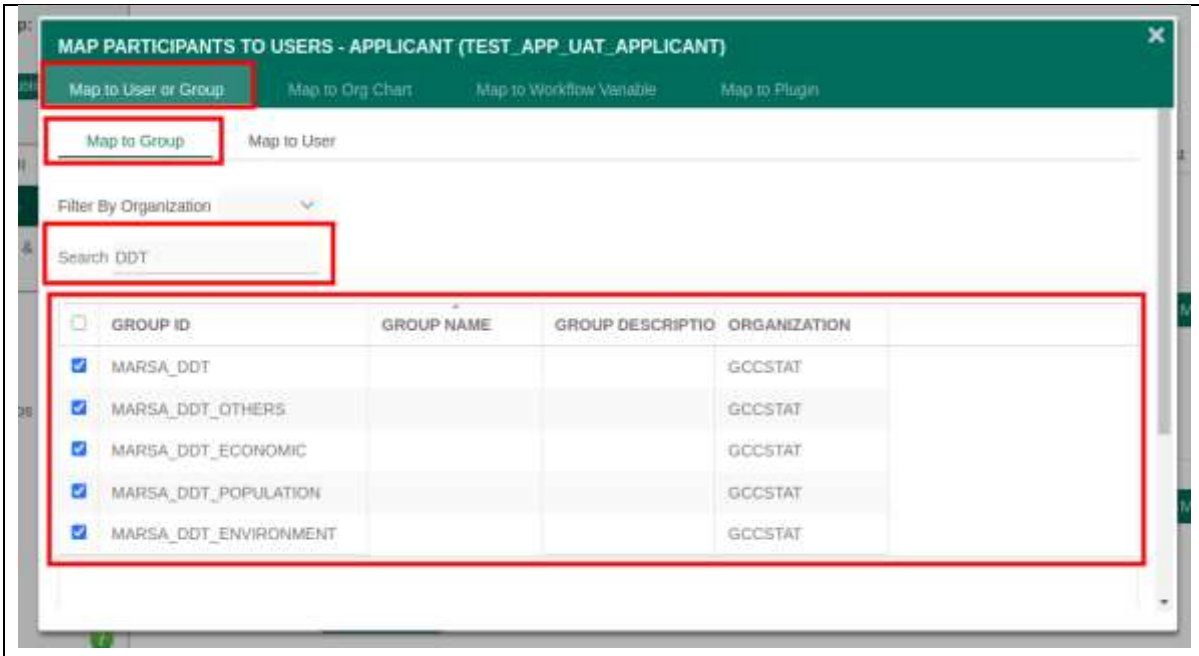
k. *Generate App* and choose *Process Approval* Template and click *Generate* and *Close*

7. Close web browser tab ad return to list
8. Go to *Processes*

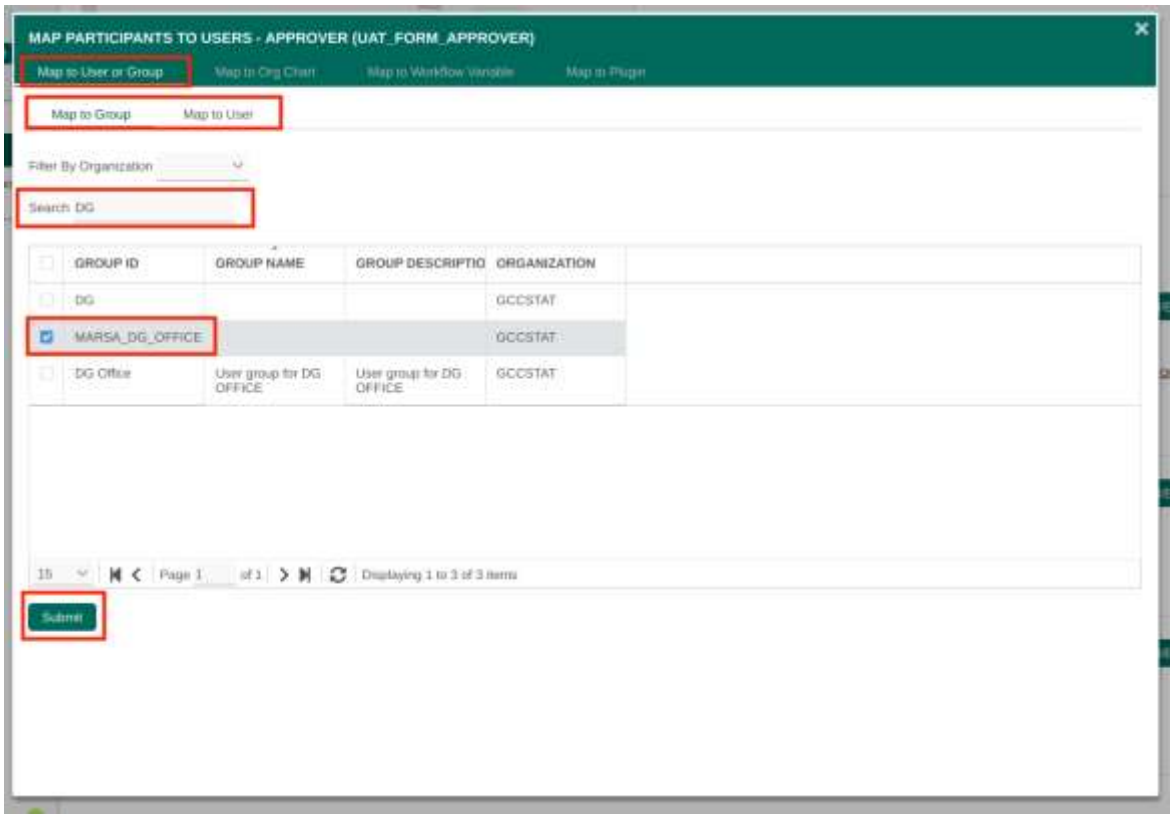
9. Assign users to lanes/roles
    a. click *Add/Edit Mapping* in each section



    b. Click *Add/Edit Mapping* by **Applicant** role and choose proper group of users (MARSA_DDT and MARSA_DDT_XX) and click *Submit*

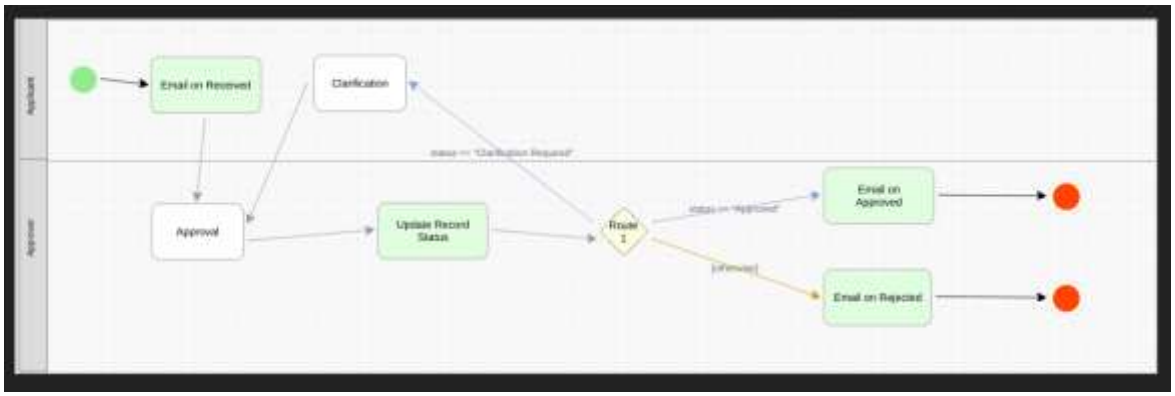


c. Click *Add/Edit Mapping* by Approver role and choose proper group of users (MARSA_DG_OFFICE) and click *Submit*

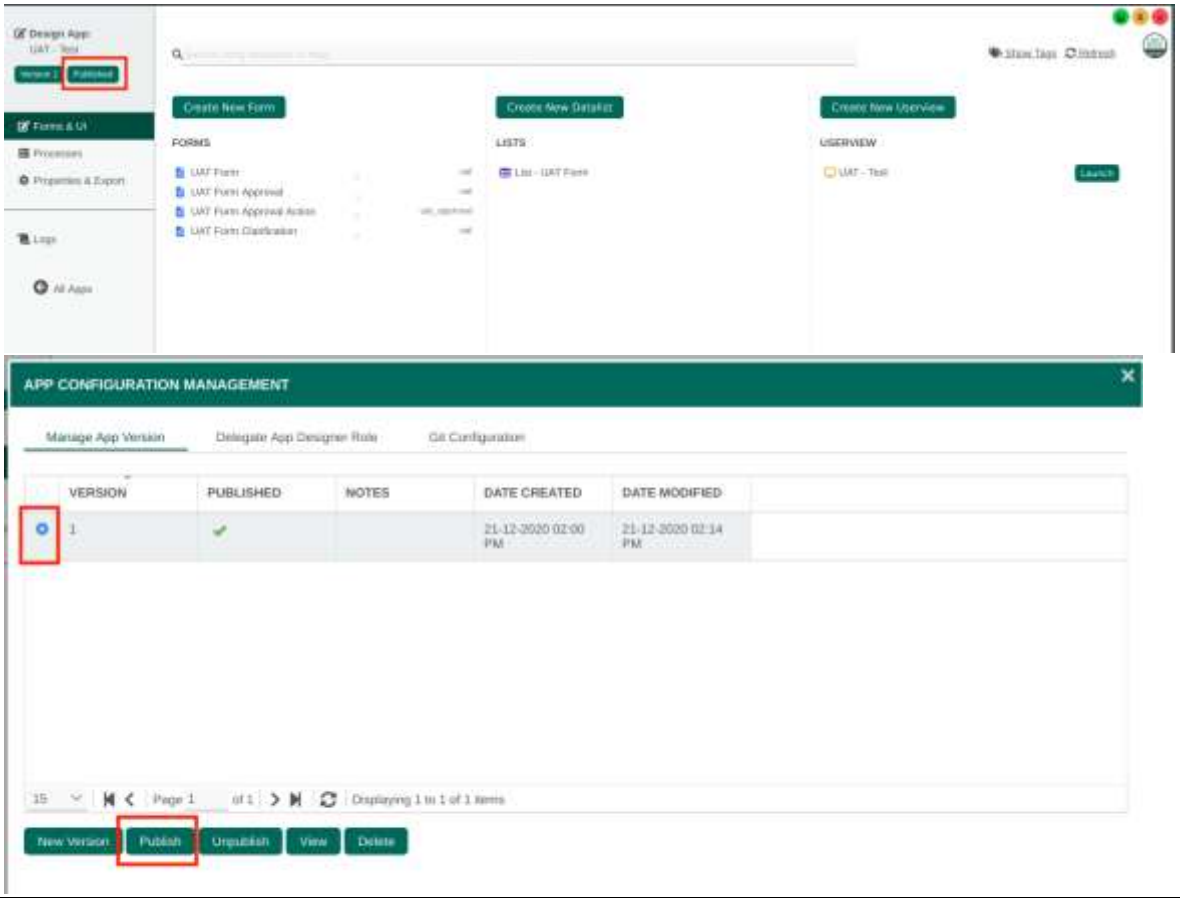


d. Click *Add/Edit Mapping* by Start White List role and choose proper group of users (Logged In) and click *Submit*

10. Verify generated app diagram



11. Publish application

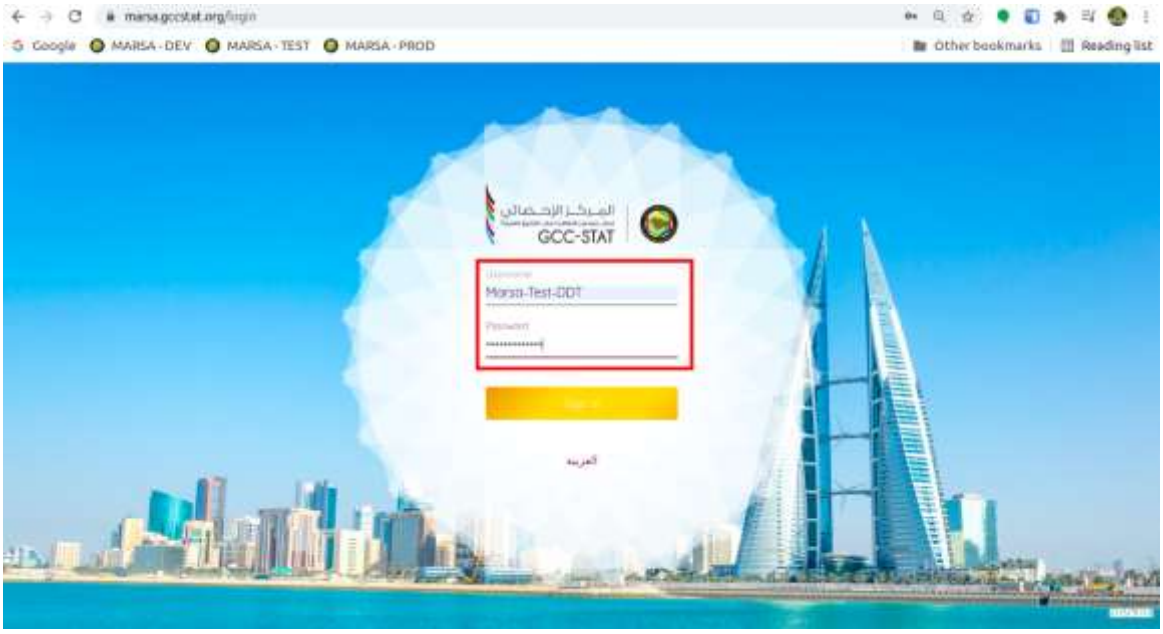


12. Log out
Testing Observation:
Accepted ☐ Comments☐ Business Process ☐ Response Time ☐ integration☐ Critical Errors ☐ Functionalities ☐ Arabization

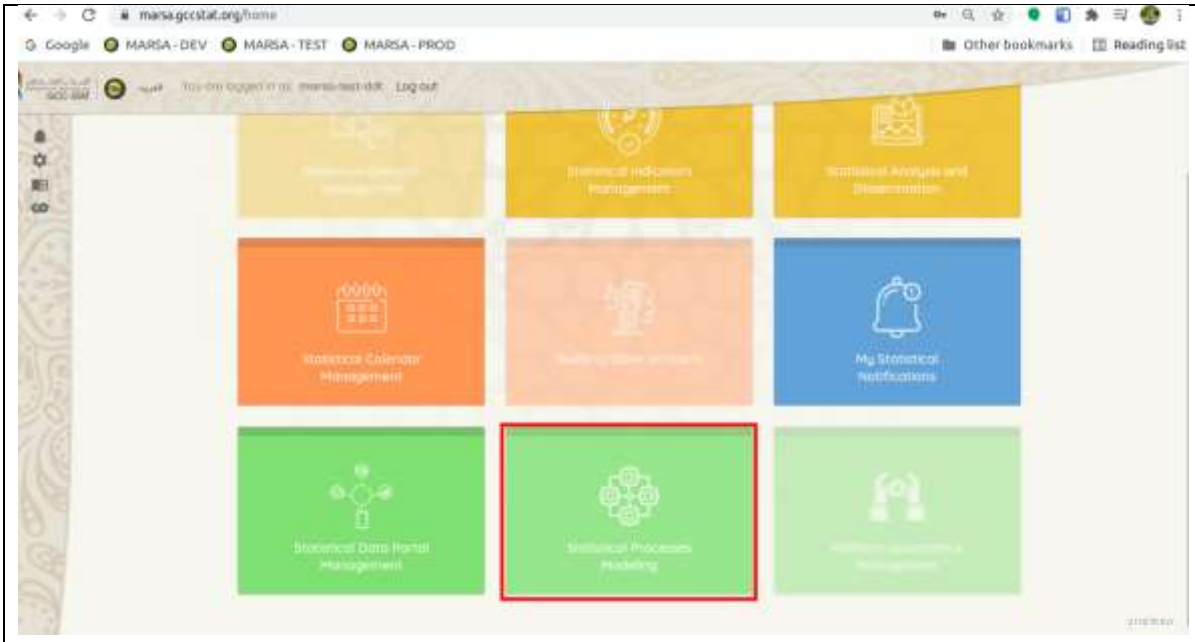
8.2 EXECUTE EXISTING BPM APPLICATIONS

Use case ID	BPM-002
Use case Name	**Execute existing BPM applications**
Description	Starting existing process in JogetDX
Sections/Modules	Business Process Modeling Module
Actors	Admins
Tool	JogetDX
Steps	

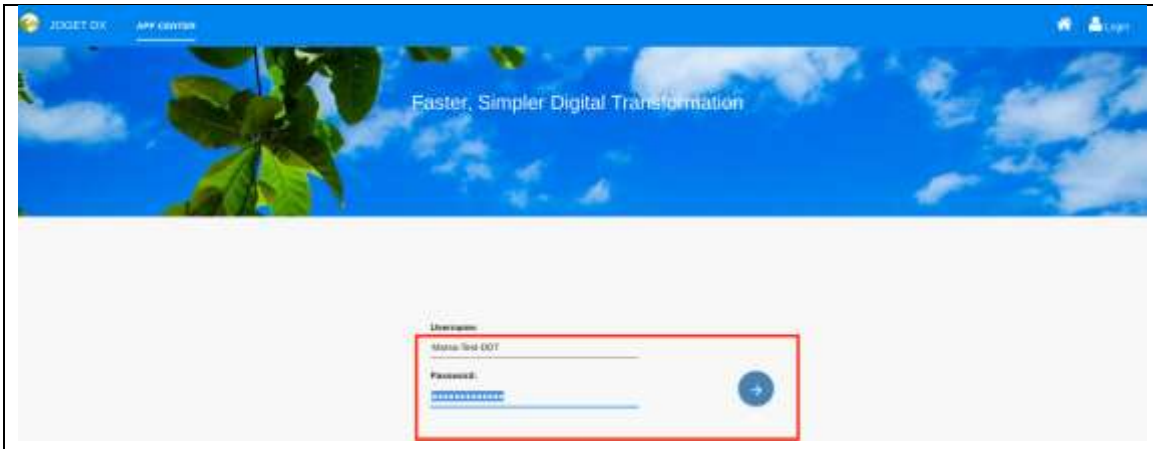
1. Go to https://marsa.gccstat.org/ and log-in to MARSA system as DDT user: Marsa-Test-DDT/ Gccstat@#9317



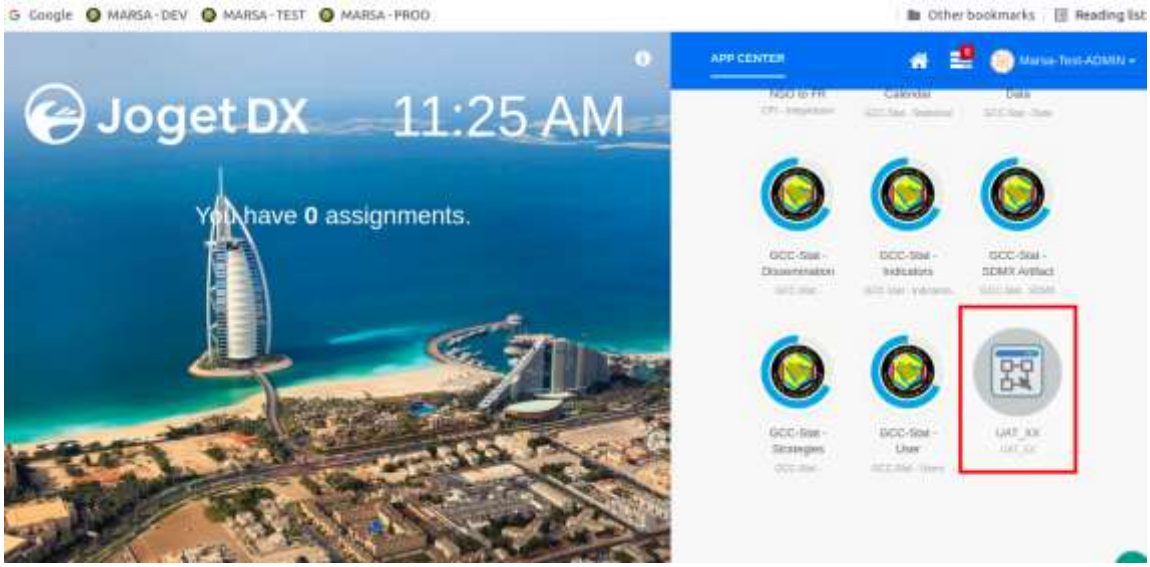
2. Click on the Statistical Processes Modeling tile



3. In JogetDX log in DDT user: Marsa-Test-DDT/ Gccstat@#9317



4. Click newly created application

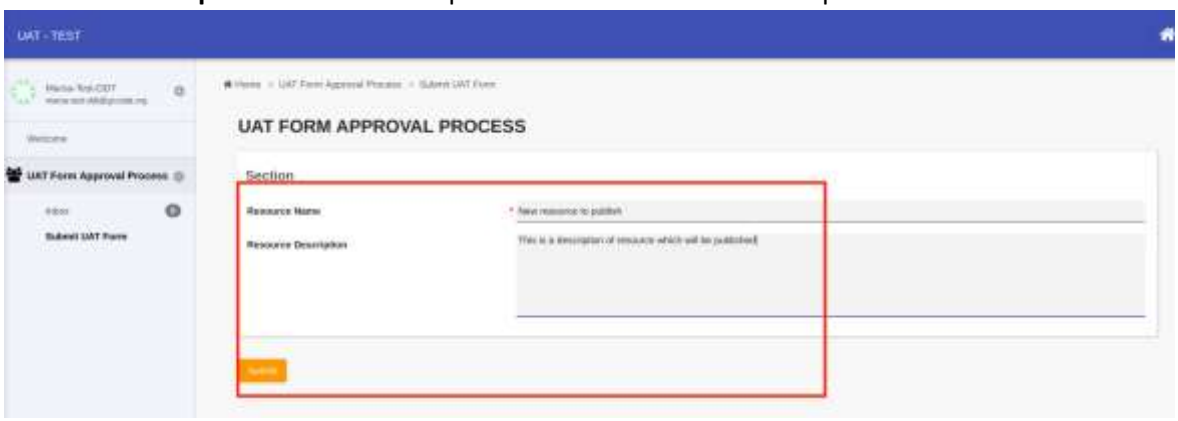


5. Click *Submit form*

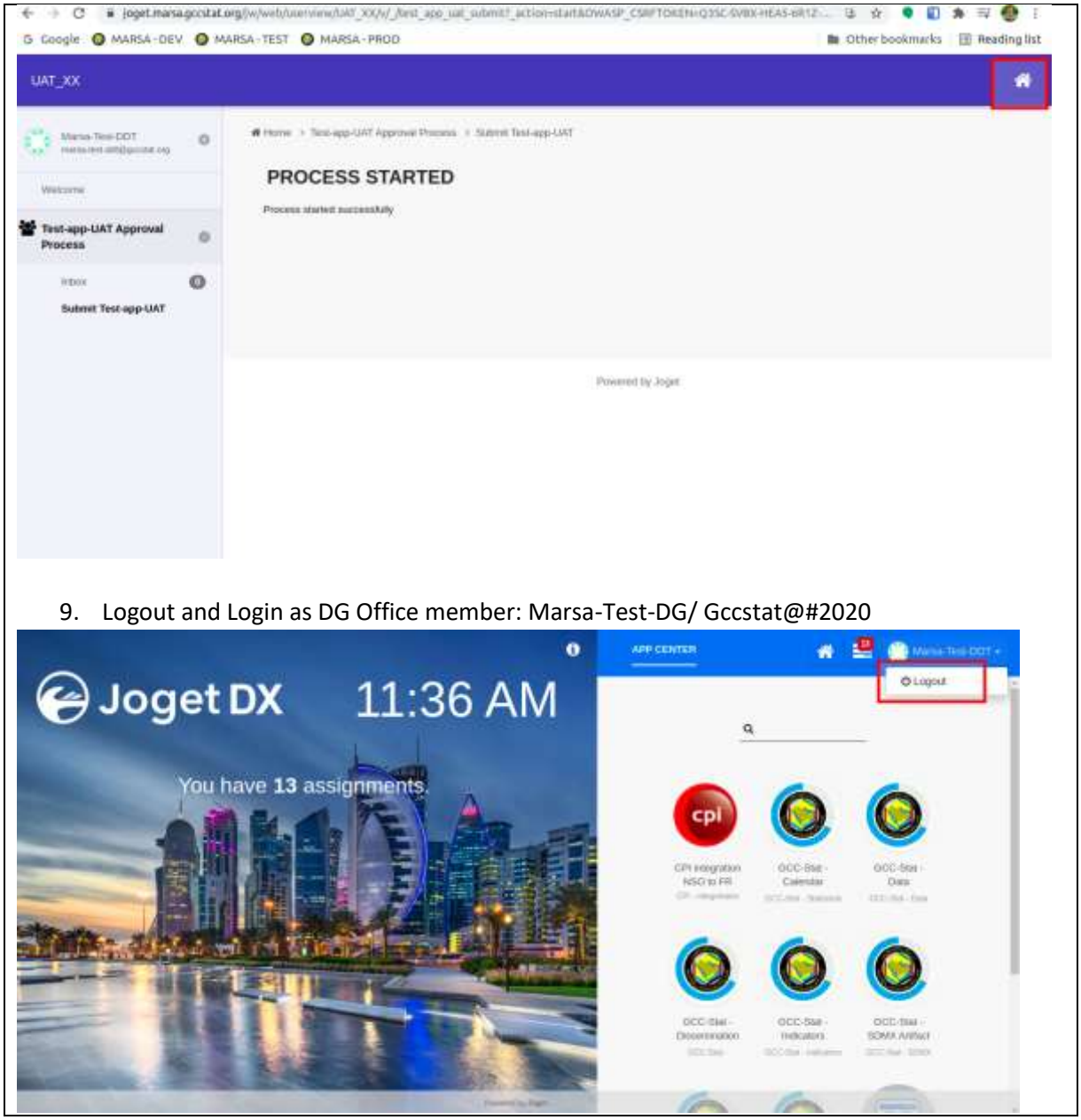
6. Fill the form with data:

Resource name: New resource to publish

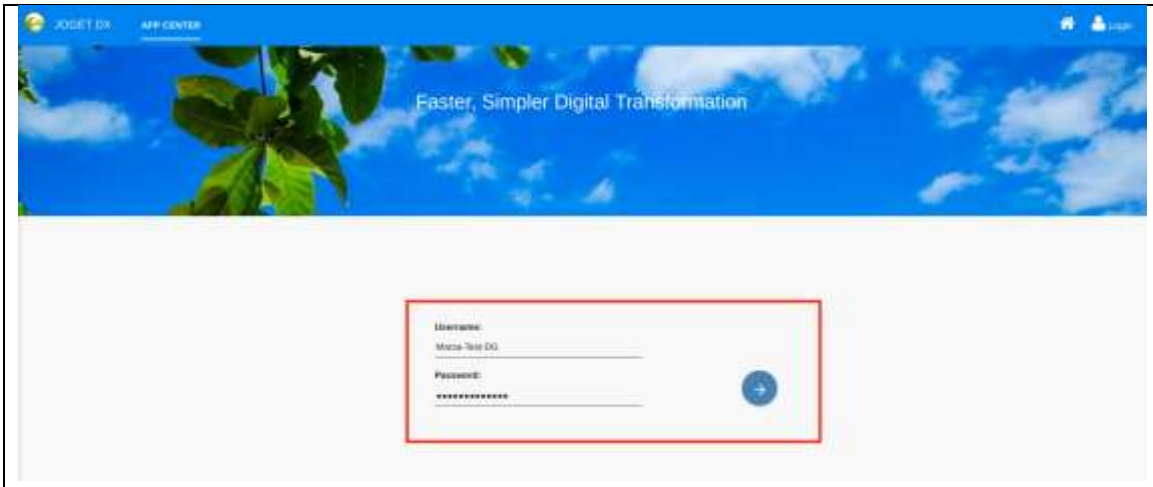
Resource Description: This is a description of resource which will be published



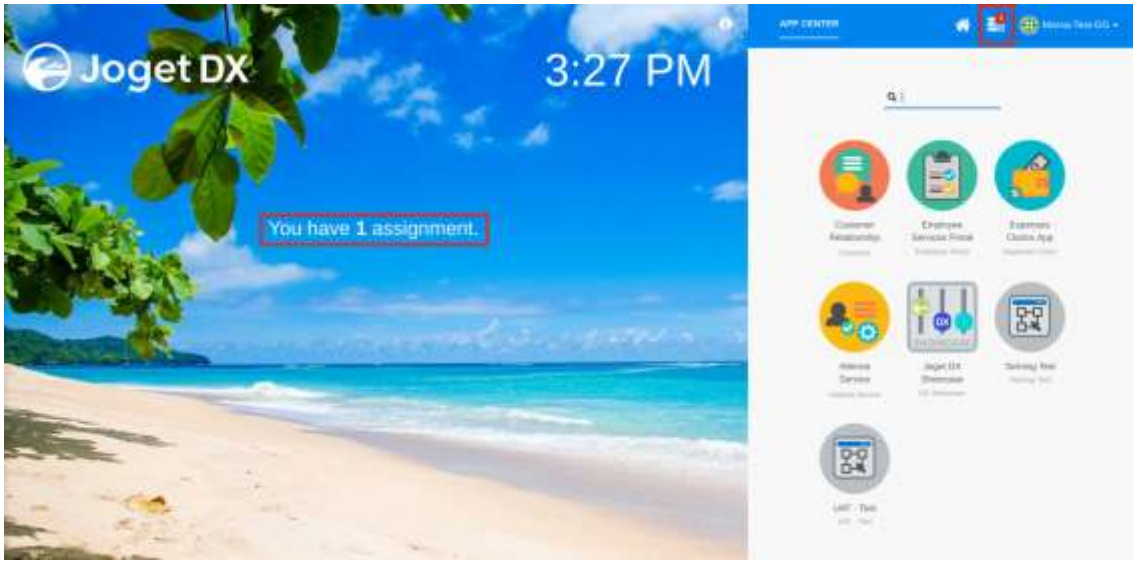
7. Click *Submit*
8. Next Click on Home Screen Icon



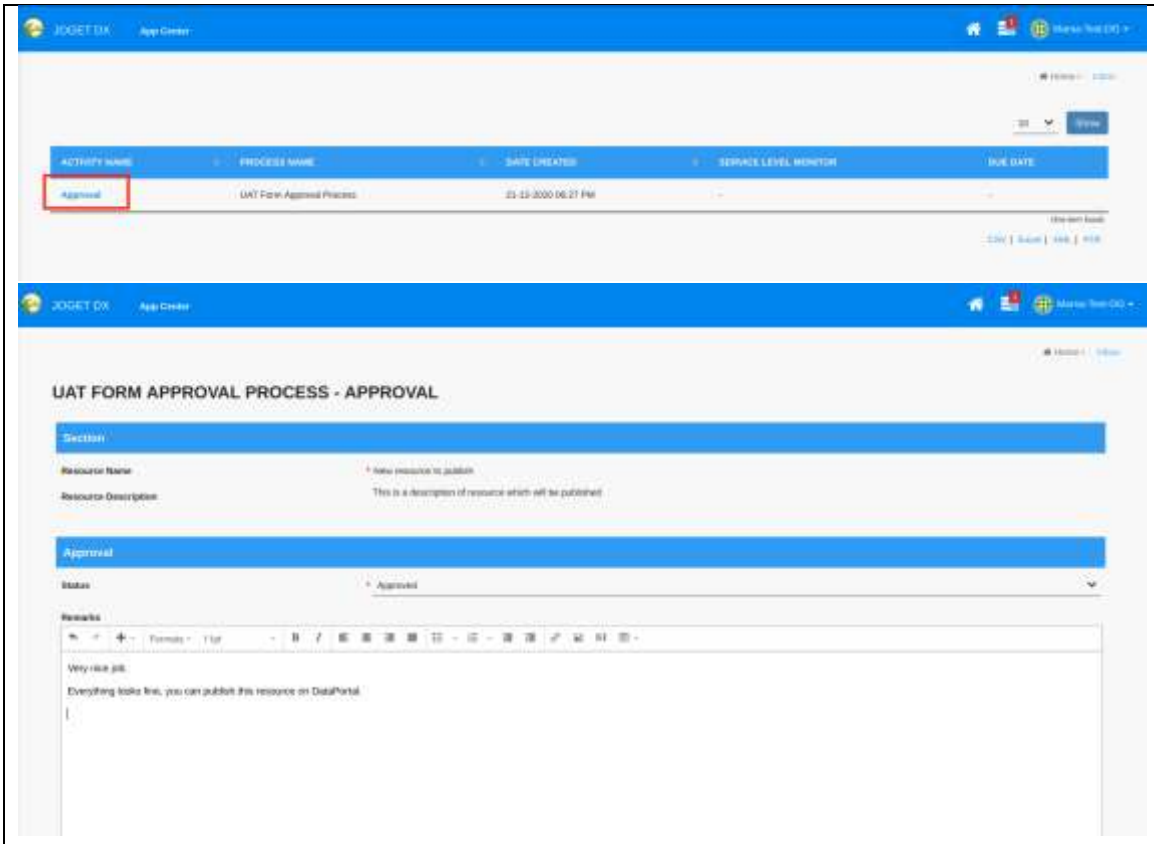
9. Logout and Login as DG Office member: Marsa-Test-DG/ Gccstat@#2020



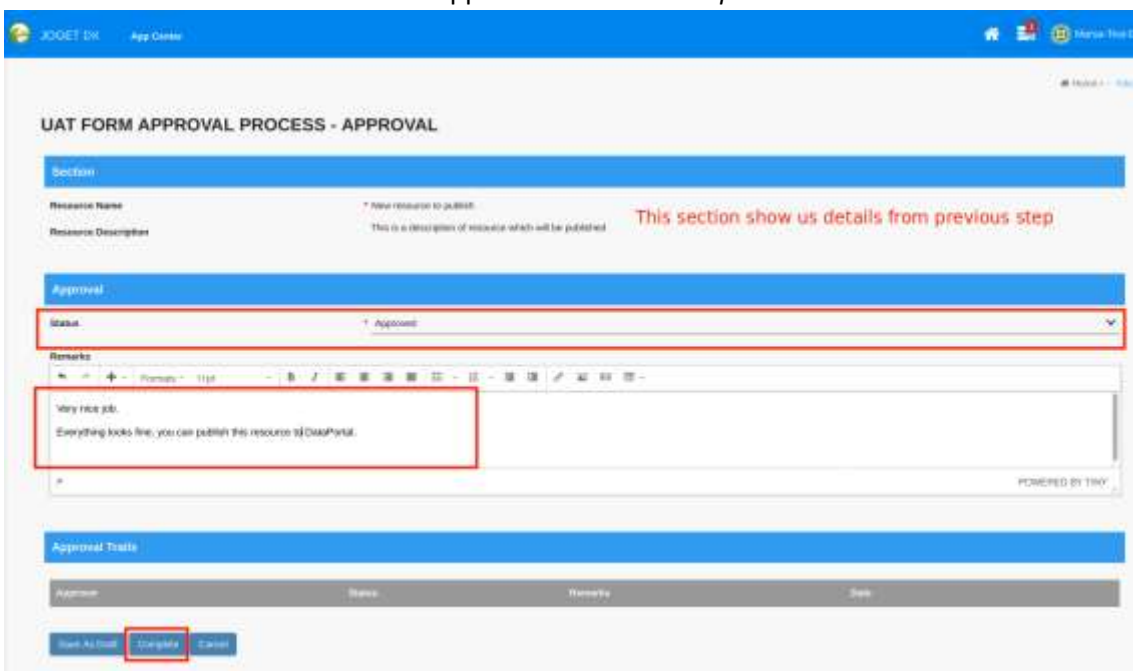
10. Go to user's assignments



11. Choose new assignment from the list and go to details



12. Fill details and set Status to Approved and click *Complete*

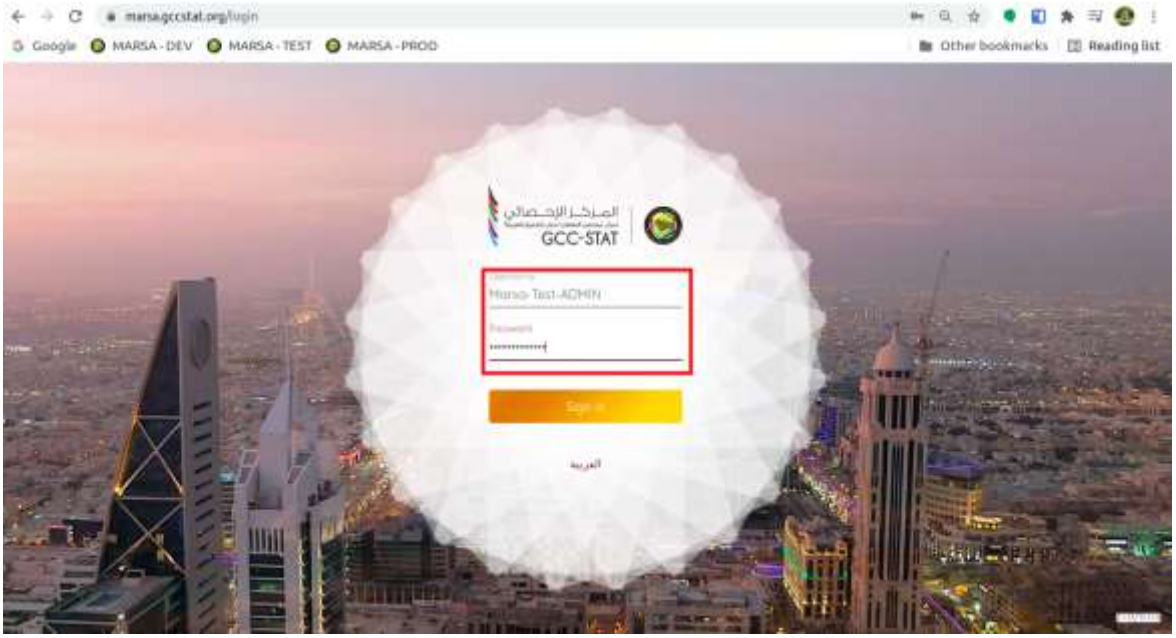


Testing Observation:
Accepted ☐ Comments☐ Business Process ☐ Response Time ☐ integration☐ Critical Errors ☐ Functionalities☐ Arabization

8.3 MODIFY EXISTING BPM APPLICATIONS

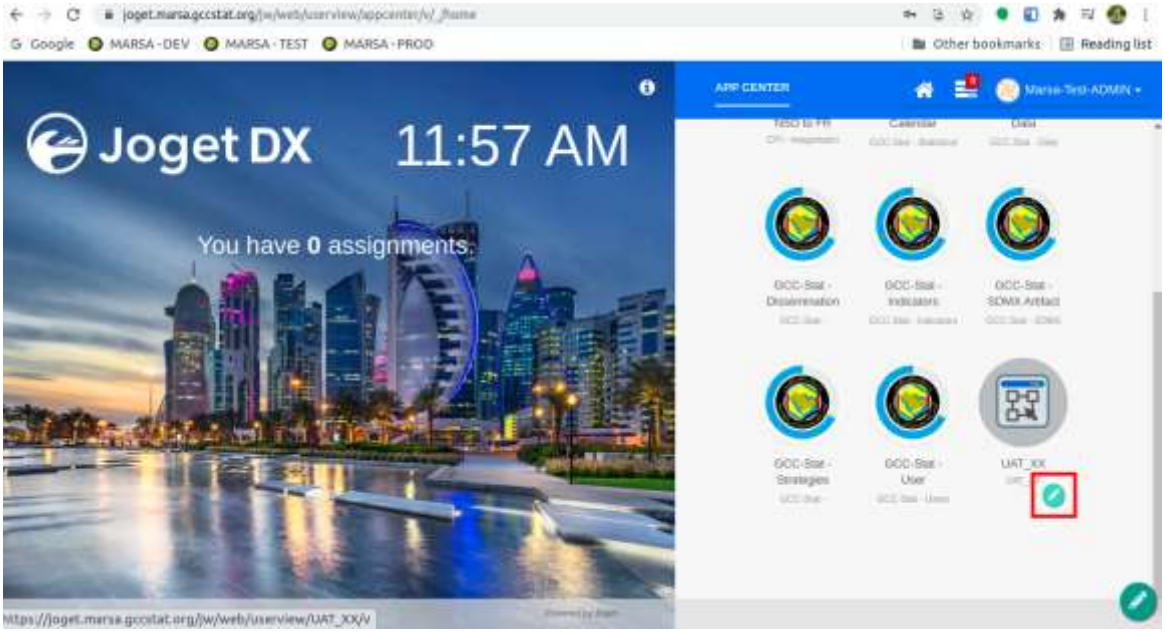
Use case ID	BPM-003
Use case Name	**Modify existing BPM applications**
Description	Modify Workflow of a business process
Sections/Modules	Business Process Modeling Module (Joget DX)
Actors	Admins
Tool	MARSA backend
Steps	

1. Go to https://marsa.gccstat.org/ and log-in to MARSA system using admin account: Marsa-Test-ADMIN/Gccstat@#2020



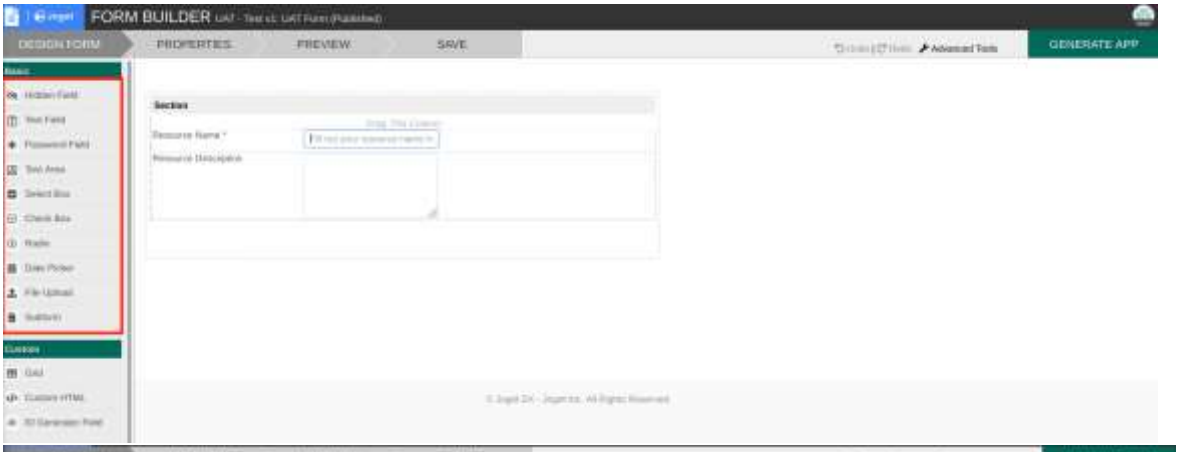
2. Click on the Statistical Processes Modeling tile

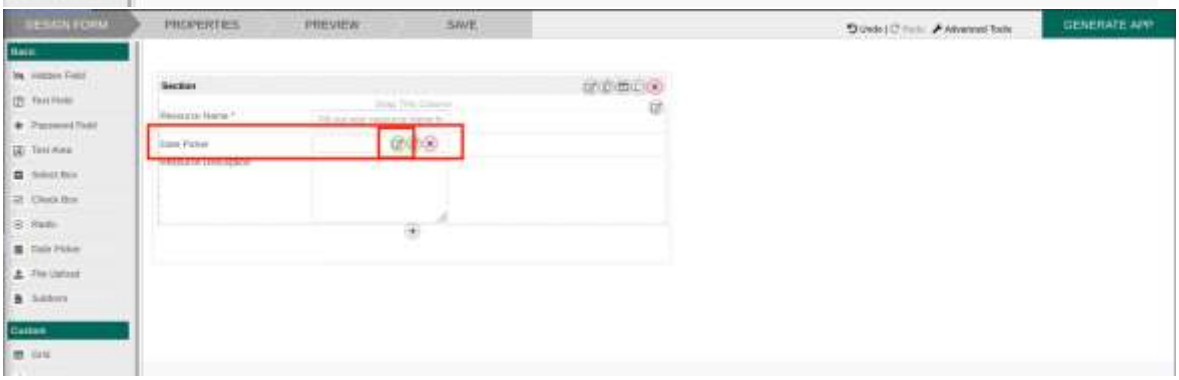
3. In JogetDX log in as administrator: Marsa-Test-ADMIN/Gccstat@#2020
4. Go to application created in previous UAT and click *Modify* (you have to hover over app icon)



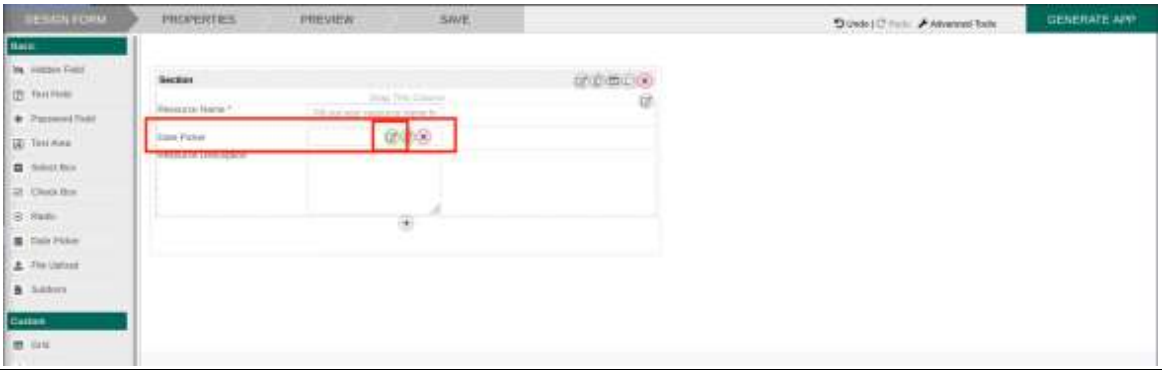
5. Click on the form to edit

6. Edit form to add a field to pick date of publication. Select and drag & drop field of type Date Picker.

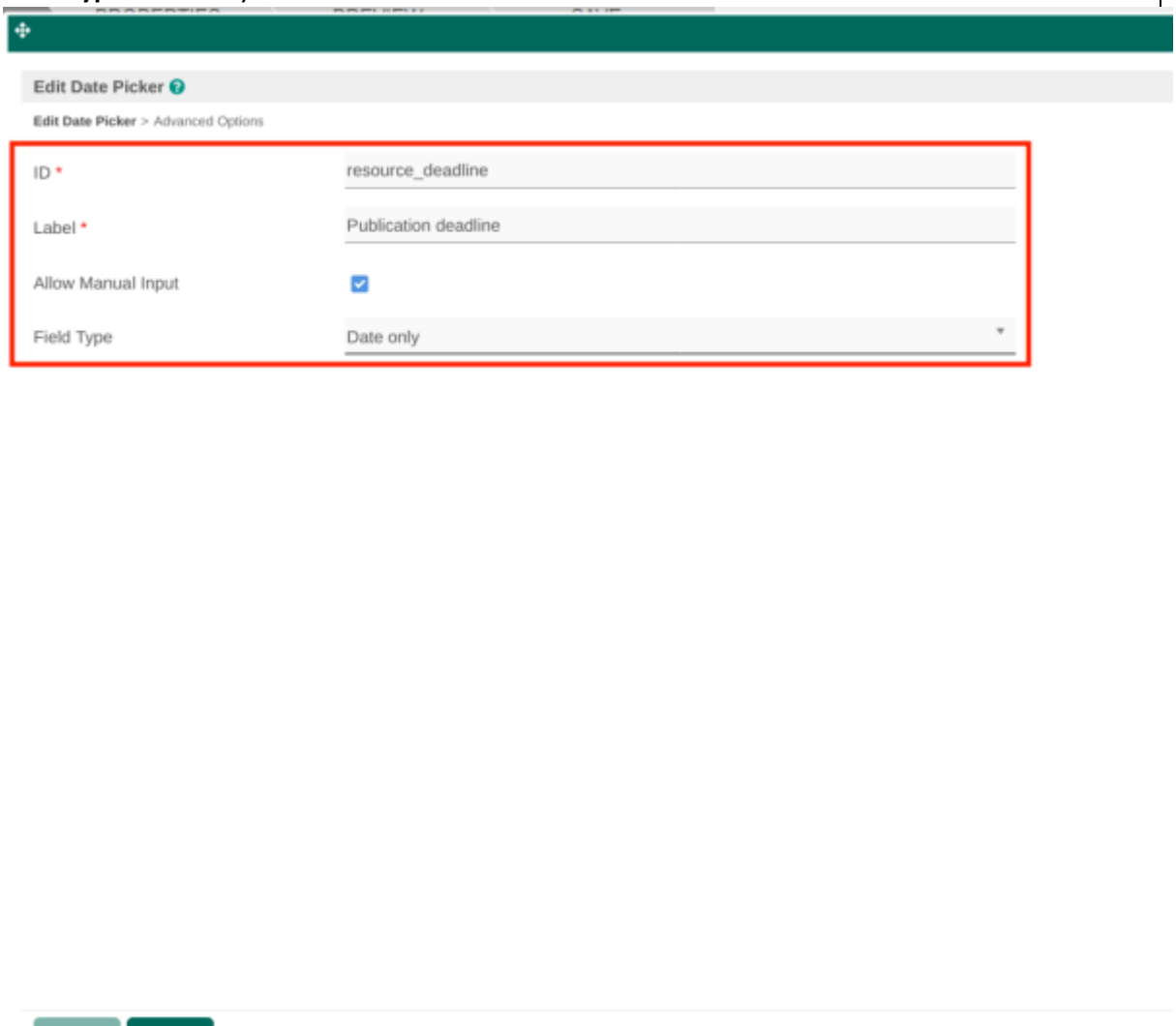




7. Edit and set properties for new field and click *OK*

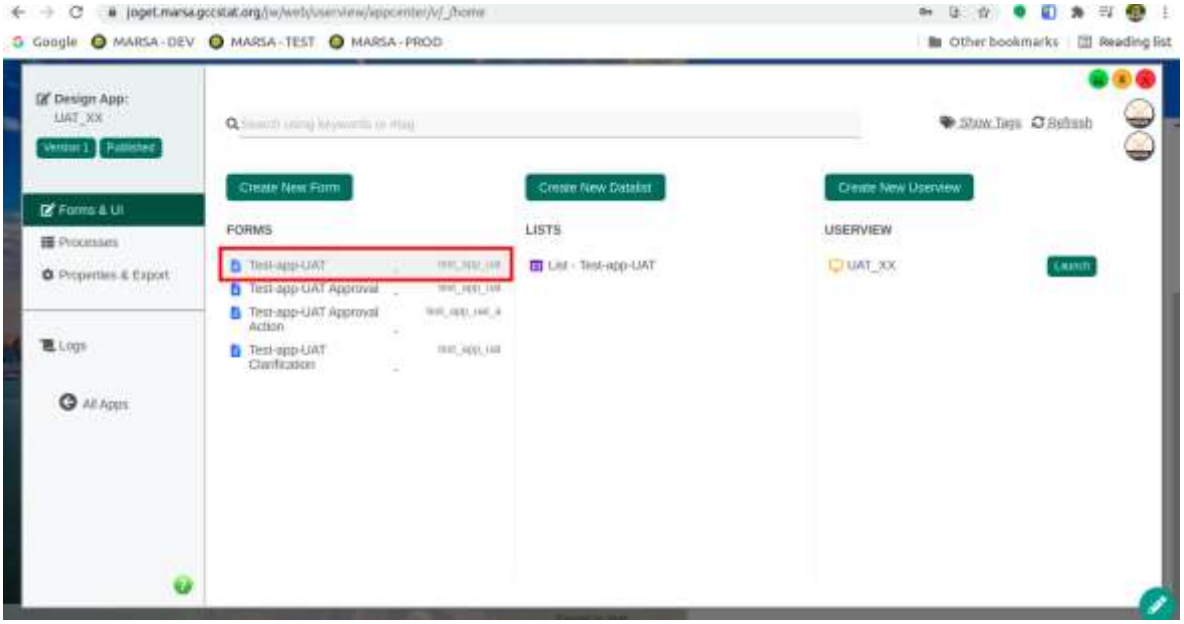


Set:
ID: resource_deadline
Label: Publication deadline
Allow Manual Input: check
Field Type: Date Only

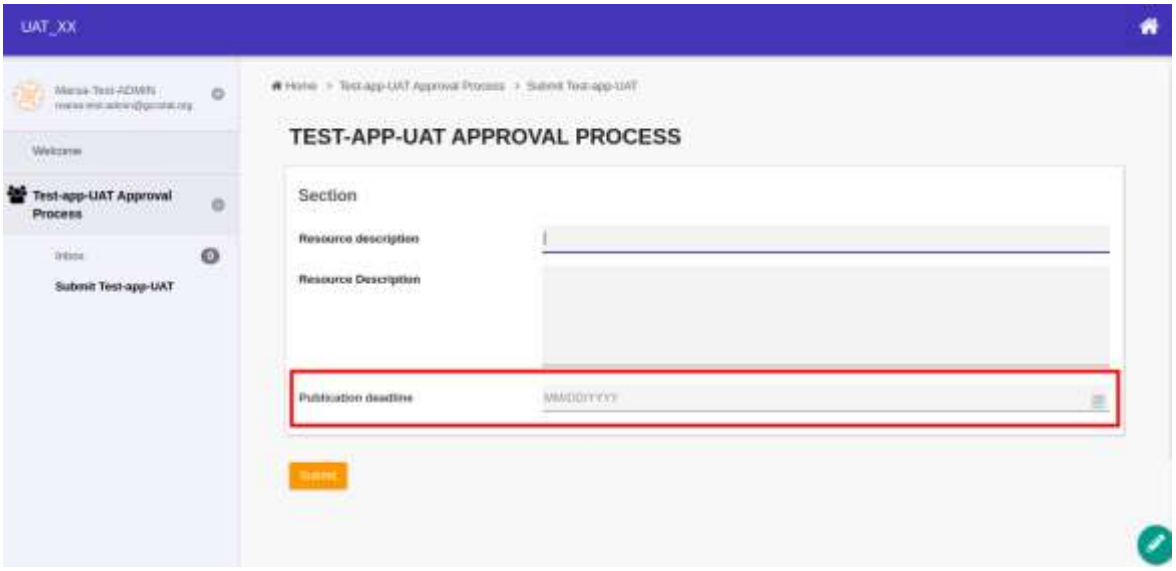


8. Save the form

9. Verify changes
    a. In current process lick on selected form and verify if new field was added.



    b. Re-run the process to verify that new field was added and is visible in the process by running use case 9.2 Execute Existing BPM applications (ID of use case: BPM-002)



Testing Observation:

Accepted ☐ Comments☐

Business Process ☐ Response Time ☐ integration☐ Critical Errors ☐ Functionalities

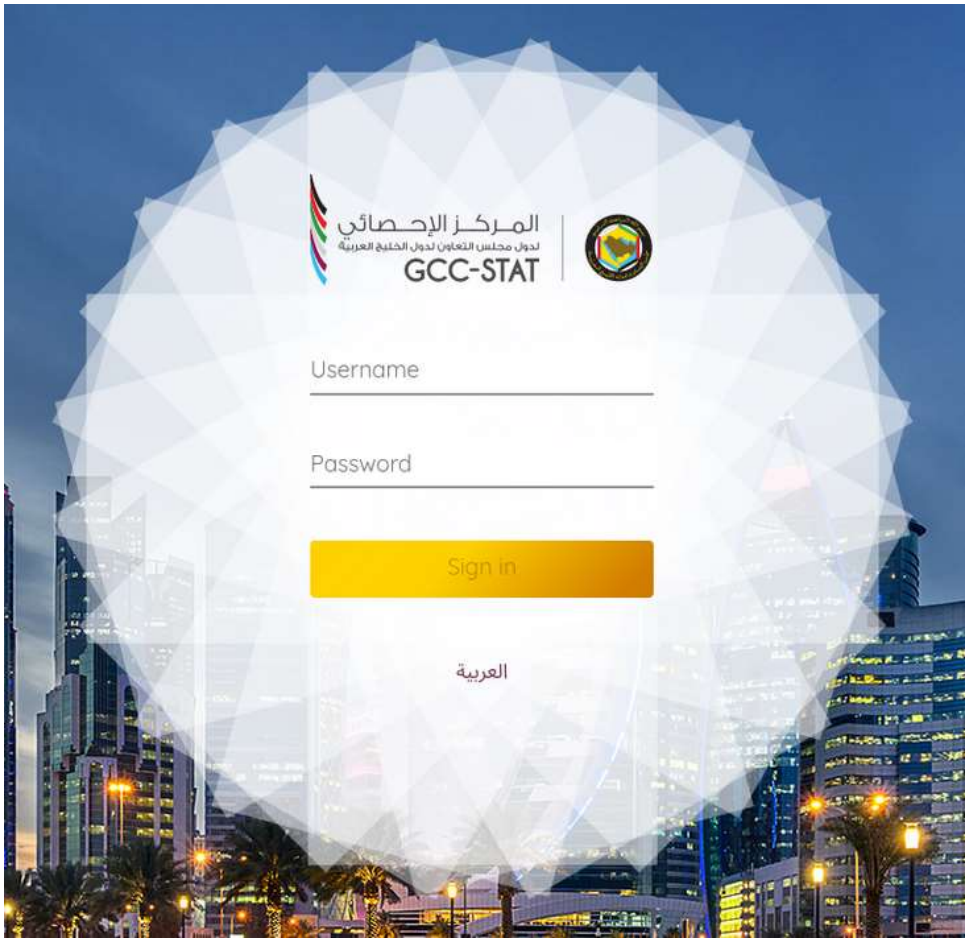
☐ Arabization

8.4 STATISTICAL CALENDAR MANAGEMENT

Use case ID	012
Use case Name	**Statistical Calendar Management**
Description	Defining and planning tasks in SCM
Sections/Modules	Statistical Calendar Management Module
Actors	Statistical Management Office, Statistical Management Team
Tool	MARSA backend
BP related to UC	Calendar Management (BP-04)
Steps	

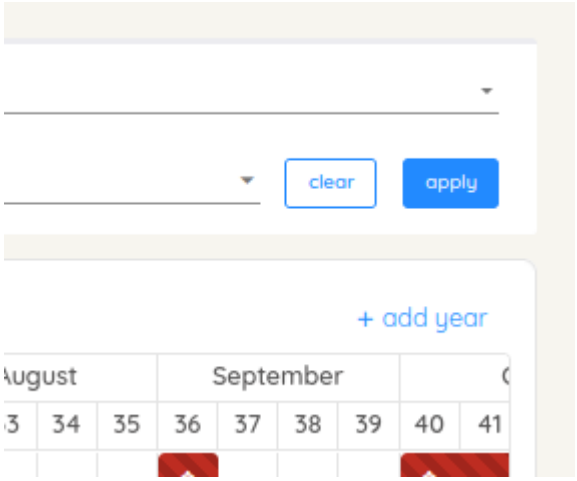
1. **Creating new Statistical Year and checking notifications**

   1.1 Login to the MARSA System as a user with access to the Statistical Calendar Management module.



   1.2 Access the Statistical Calendar Management module.

1.3 Click the **+ add year** button. This will the next year in the calendar. If there are no years in the calendar, the button will add the current year.



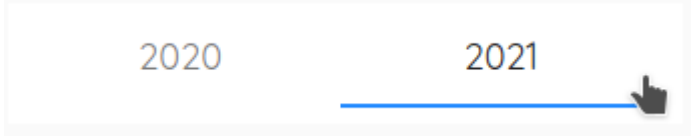
After creating a new Calendar year, appropriate users (based on the Notification Matrix) will receive a Notification in the MARSA System.

2. Planning and Creating events

NOTE

In this use case, you will create a Non-Periodic Task. For planned tasks with notifications refer to the points 4 and above of the use case.

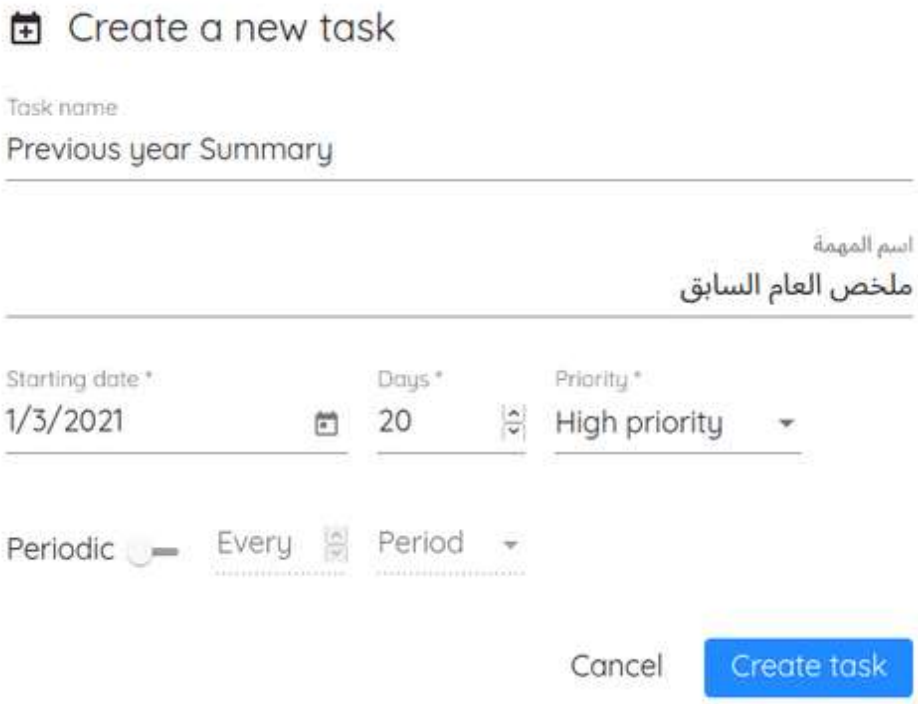
2.1 Select the year you want to add a **Task** to.



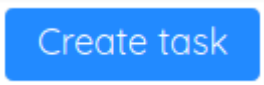
2.2 Click the **Add Task** button.

2.3 Fill in all the fields (example shown on the screen below):

- English name of the **Task**,
- Arabic name of the **Task**,
- Starting date of the **Task**,
- Planned number of days to complete the **Task**,
- Priority - **low**, **normal** and **high**;
- Periodic - **Mark** it as **Deselected** (will change color to gray),



2.4 Click the **Create task** button.



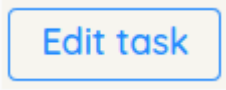
2.5 You will get a screen with weekly partitioned time regarding the newly added task.

3. Linking event with process from Business Process Modeling Module

3.1 Select the year where the **Task** you want to edit is.

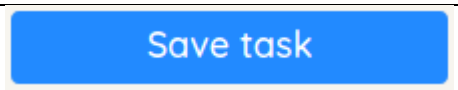
3.2 Click on the Task you want to edit.

3.3 Click on the Task you want to edit.



3.4 On the **Task's Details** click the **Process title** field and select a **Process** from the Statistical Processes Modeling module.

3.5 To finish editing a **Task** click the **Save task** button.

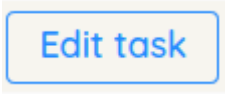


4. Planning of cases

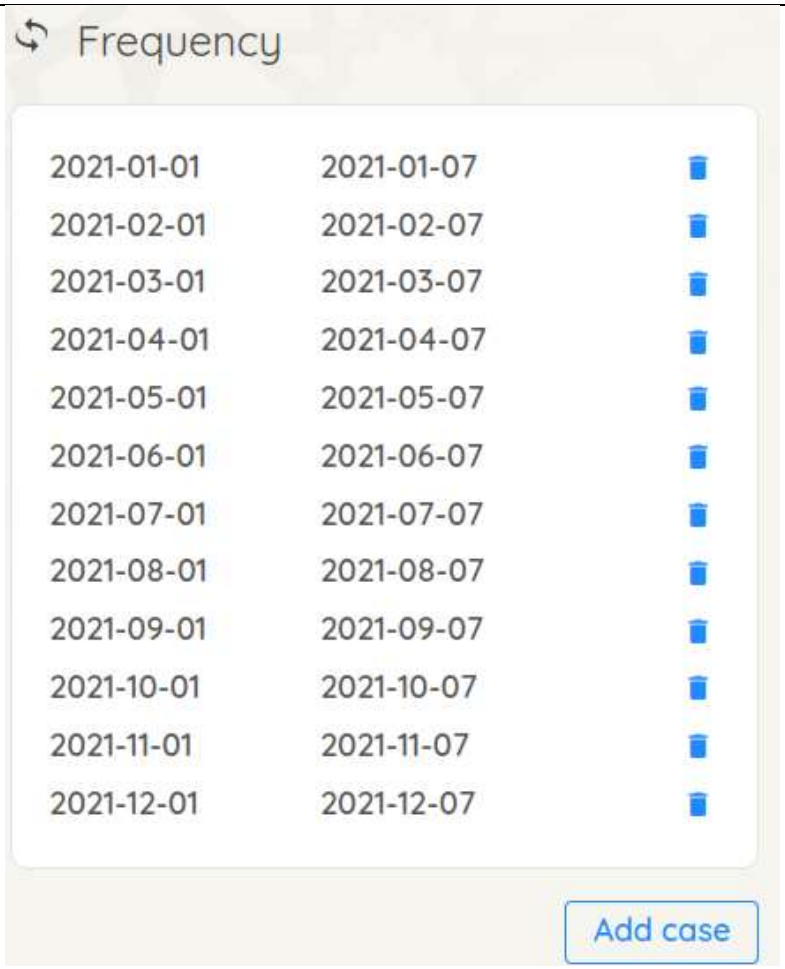
4.1 Select the year where the **Task** you want to edit is.

4.2 Click on the **Task** you want to edit.

4.3 Click the **Edit** task button.

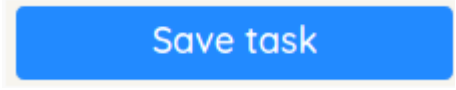


4.4 To change the Task's Cases, either delete a Case by clicking the icon next to it or add a new Case by clicking the Add case button.



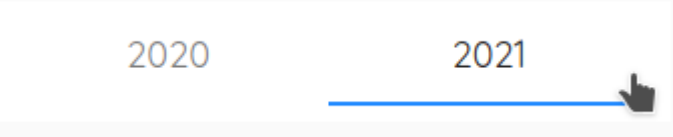
4.5 If you clicked the **Add case** button, then provide the **Start date** and **End date** for the new **Task Case** and click the **Create case** button.

4.6 To finish editing a Task click the **Save task** button.



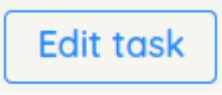
5. Planning notification

5.1 Select the year where the **Task** you want to edit is.

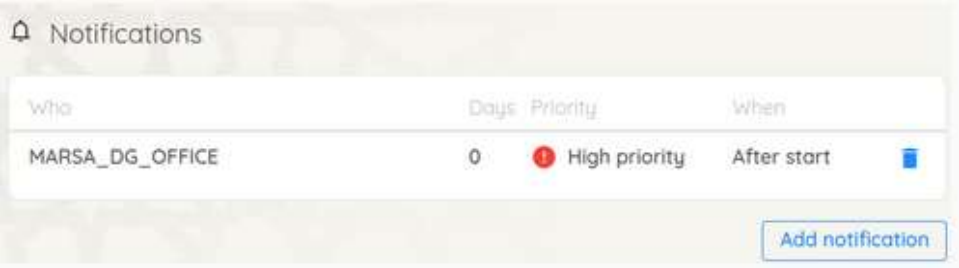


5.2 Click on the **Task** you want to edit.

5.3 Click the **Edit** task button.

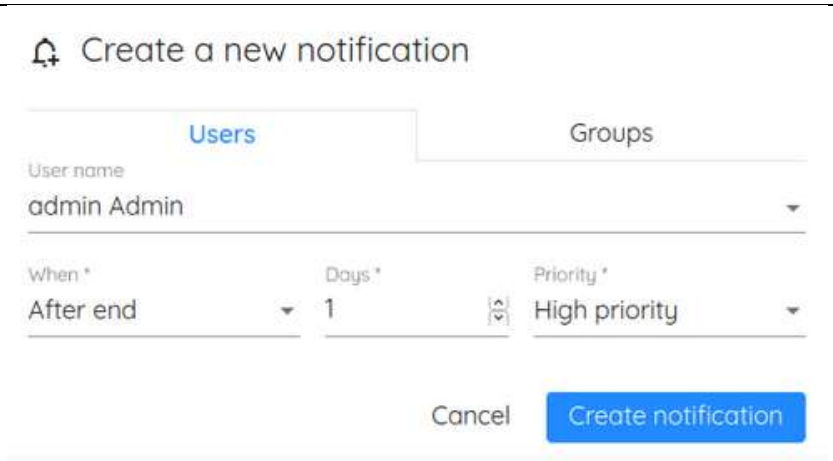


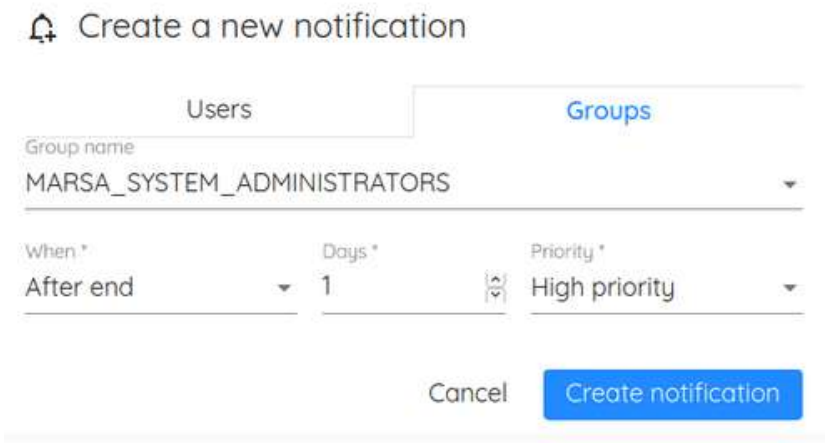
5.4 To change the **Task's Notifications**, either delete a **Notification** by clicking the icon next to it or add a new by clicking the **Add notification** button.



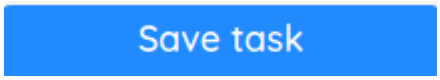
5.5 If you clicked the Add notification button, then:

- set who will be notified: a single user (Users tab) or a group of users (Groups tab),
- select When to notify the user by choosing a plan type (Before start, After start, Before end, After end),
- select how many Days before or after the plan type in When the notification will be sent,
- choose the Priority of the notification,
- finally, click the Create notification button.





5.6 To finish editing a **Task** click the **Save task** button.



Note

After adding Notification Plans, appropriate users based on the added Notification Plan will receive a Notification in the MARSA System.

5.7 Note the name of the task to be reviewed.

5.8 Reviewers: Data Dissemination Team and Heads of the departments should go to Statistical Calendar Management Module and review task and its details based on data passed from step 5.7

6. **Running processes**

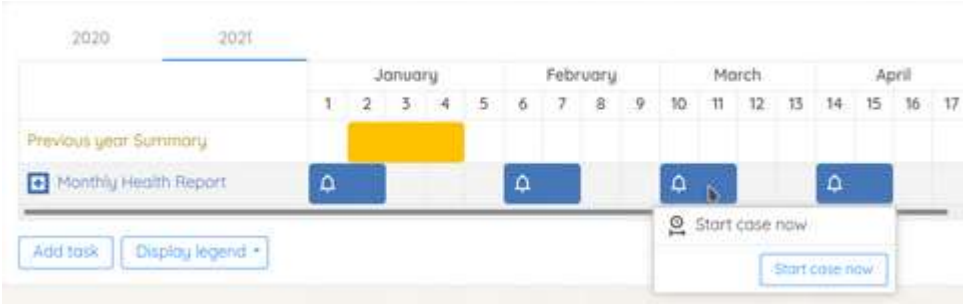
NOTE

There are two ways of starting a process.

6.1 Starting a process on the Calendar Section

6.1.1 Select the year where the **Process** you want to start is.

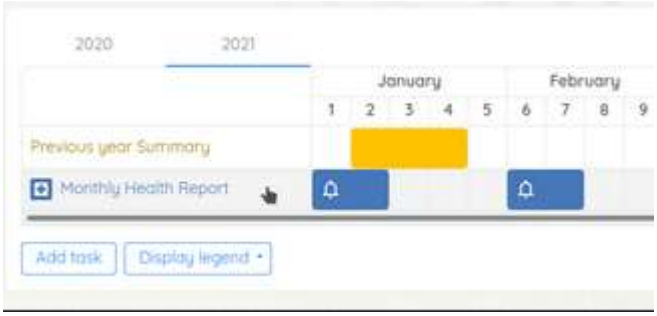
6.1.2 Click the **Case** on the calendar and in a new popup, click **Start case now**.



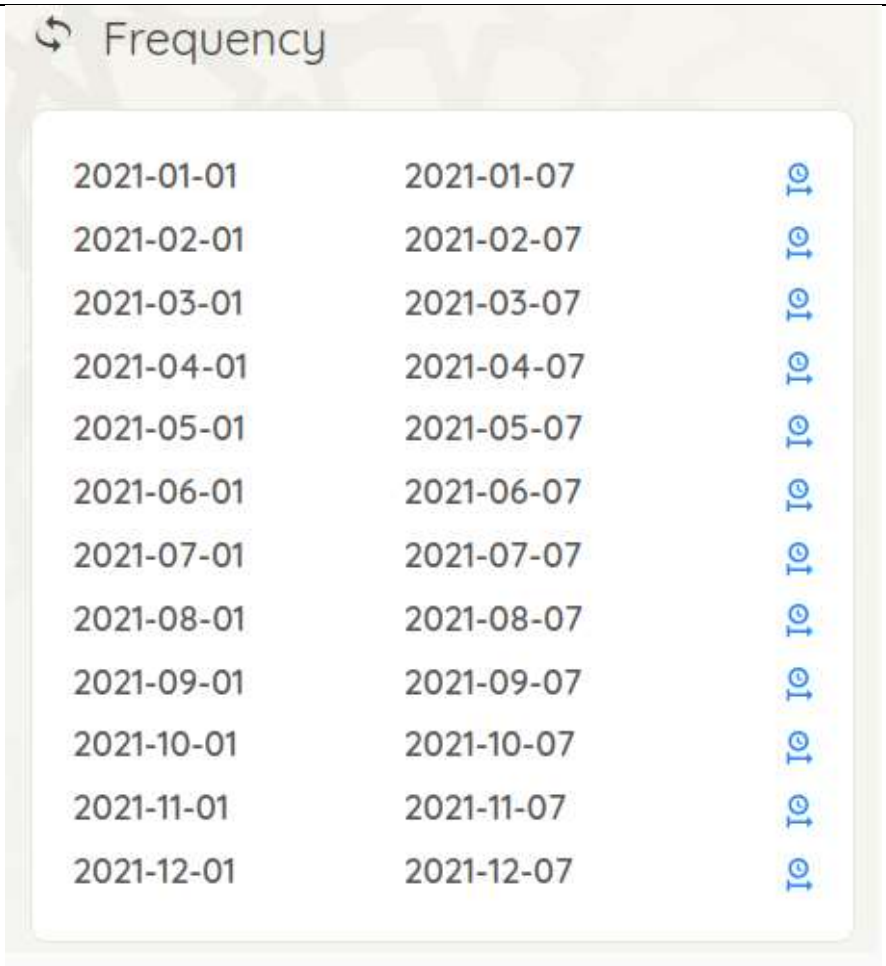
6.2 Starting a process on the Task Details section

6.2.1 Select the year where the **Process** you want to start is.

6.3 Click on the **Task** which process you want to start.



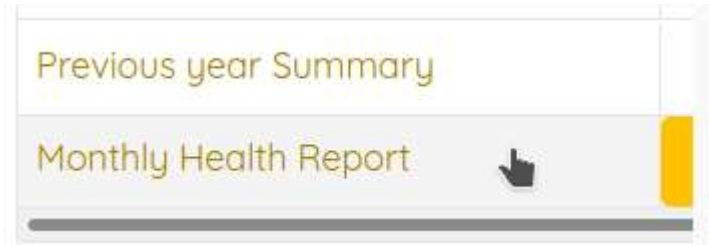
6.4 Click the **start case** icon next to the case you want to start - .



7. Analyzing progress graph

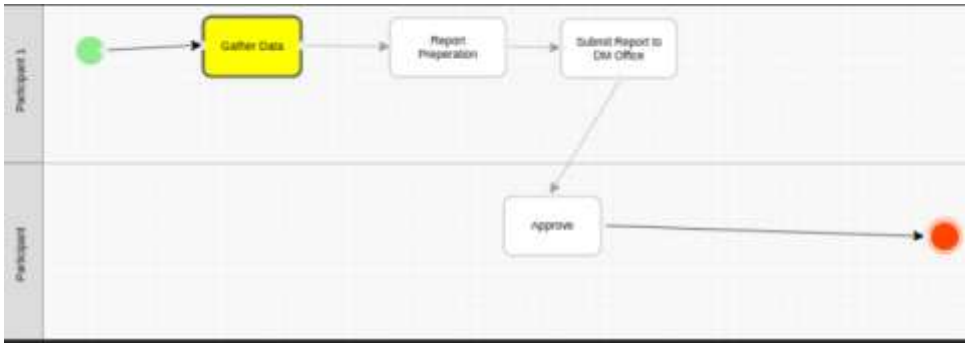
7.1 Select the year where the **Task** with the process you want to check.

7.2 Click on the **Task** with the process you want to check.



7.3 Click on the icon next to the active case to see the graph - .

7.4 The graph shows the entire **Process** as well as the current step of the process (bold border with yellow color)



Testing Observation:
Accepted ☐ Comments☐ Business Process ☐ Response Time ☐ integration☐ Critical Errors ☐ Functionalities ☐ Arabization