Cora SeQuence Workflow Templates

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V8.8 and earlier

Overview

Cora SeQuence includes a rich library of pre-built templates. These templates can be a great starting point for developing workflow applications. They will save you time by providing well built workflows, forms, and features that replicate common scenarios. You can quickly copy and customize them to your requirements.

> **TIP**: To get the most out of Cora SeQuence templates, observe them as they run, open their activity configuration to see their markup, data model structure, condition settings, etc., and note the explanations and links to additional resources.

List of Templates

The following is a list of the available templates. You can download each template by clicking the template link.

Scenario-based Workflows:

- **Approval Chain**: An approval chain workflow. This workflow sends a form for approval and displays the decision history together with the form itself.
- **Change Request**: An example of a change request workflow. This workflow sends a change request for triage, then approval.

Scenario-based Forms:

- **Form Templates**: A set of pre-built form templates, including: Expense Report, Expenses Reimbursement, Meeting Agenda, Purchase Request, Travel Request.
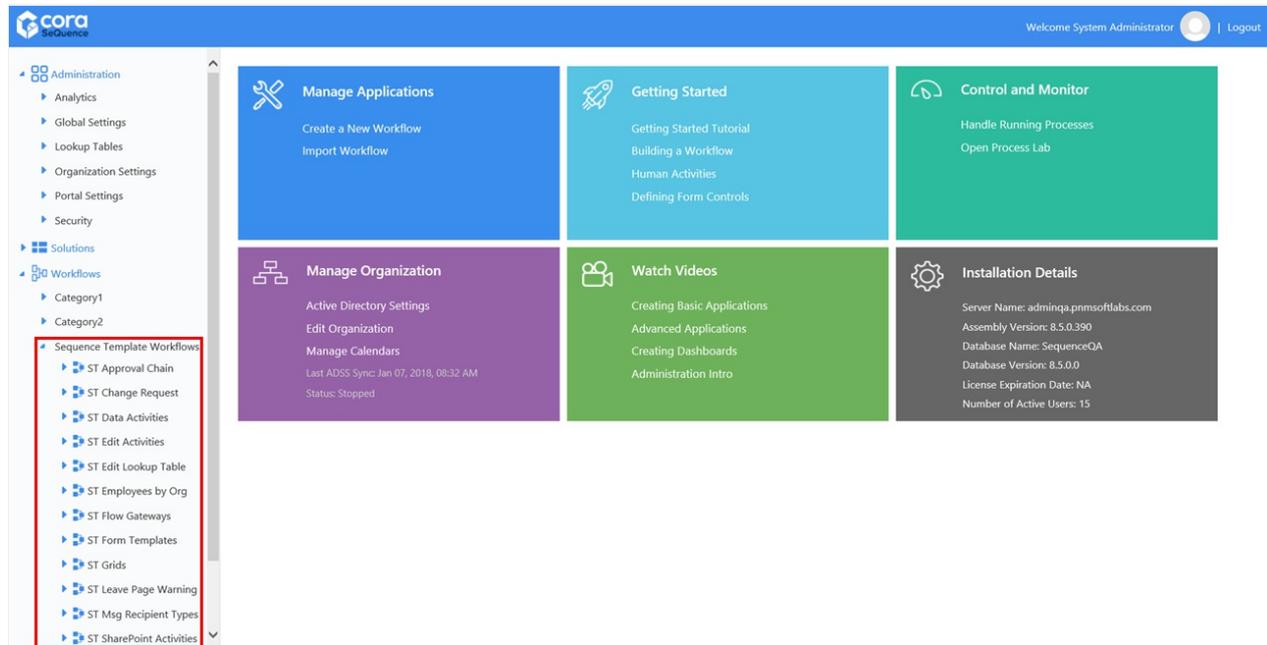
Examples of Individual Features

- **Data Activities**: Demonstrates the Data Activities functionality and basic implementation methods.
- **Edit Lookup Table**: Shows how to edit lookup tables from within the workflow.
- **Employees by Org**: Displays employees in a grid according to a selected organization from a combo box.
- **Flow Gateways**: Examples of the gateway flow activities (IfElse, Split, Switch, And, End).
- **Grids**: Examples of grid features for working with grids in edit modes, table/service data sources, export, calculated column, aggregation, hierarchy grids, and more.
- **Leave Page Warning**: A script that warns users before they leave a page.
- **Message Recipient Types**: Examples of message recipient types (e.g., by role, by department, external users, etc.).
- **SharePoint Activities**: Shows how to use the SharePoint activities to integrate with SharePoint lists.
- **Subviews**: Examples of sub views in a simple approval chain.
- **Using REST**: Demonstrates how to implement a RESTful service integration.
- **Using Sub-Workflows (_Main and _Sub)**: Demonstrates how to call a sub workflow from a main workflow.

Install Cora SeQuence Templates

To use Cora SeQuence templates, you must install them on your Cora SeQuence environment. You can do so by downloading and running the Cora SeQuence templates setup file. From v7.9 and later, the templates are installed by default. For earlier versions, request the appropriate setup file from Support Team.

After you install the Cora SeQuence templates, they display in the Administration tree under Workflows. The template workflows (and their attached objects) have an ST prefix.

How to Use Cora SeQuence Templates

Each template includes inline documentation and instructions.

1. Set the workflow permissions.
2. Start a new instance using either Process Lab or in Flowtime.
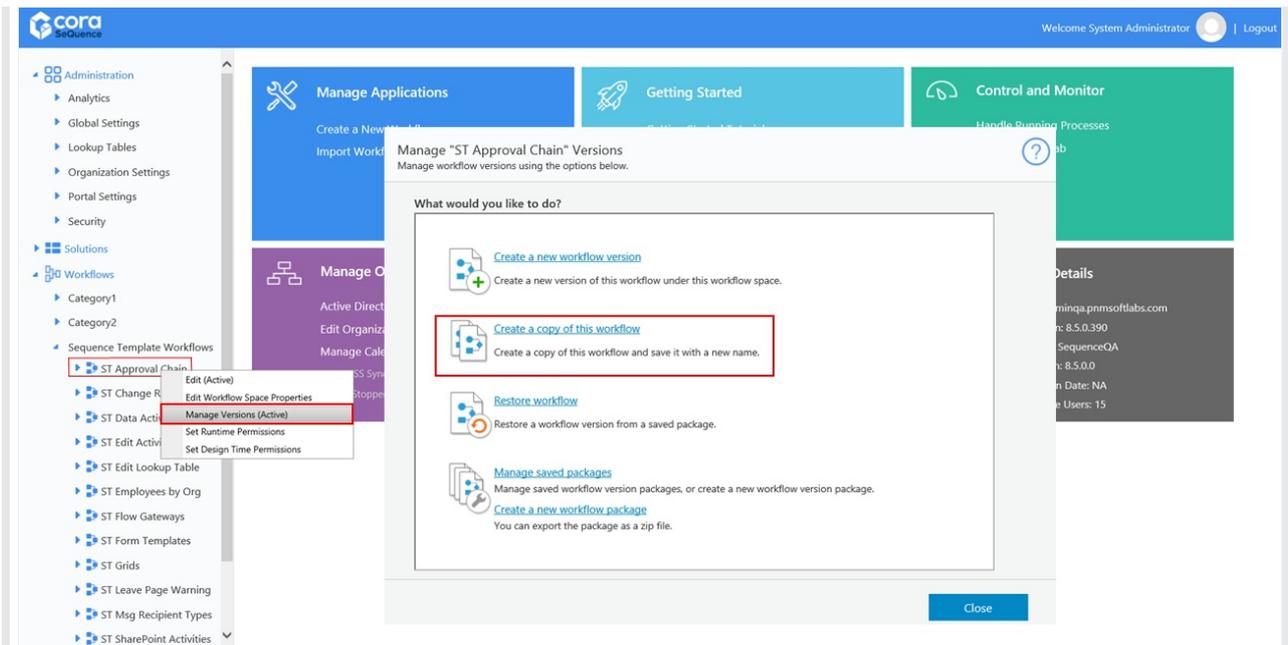3. Double-click the first activity, which is highlighted, to being the workflow.

Reuse a Cora SeQuence Template

These are the most common use cases for reusing Cora SeQuence templates.

Scenario-based Workflows

You create a duplicate workflow and then customize the duplicate workflow as necessary. This is relevant for Cora SeQuence templates, such as ST Approval Chain and ST Change Request.

To create a workflow duplicate, right-click the workflow you want to duplicate, and select **Create a copy of this workflow**.

Use Form Templates

You create your own workflow, and add a form template, customizing as necessary. When you create the form, you select the Duplicate Form creation method, and select the ST Form you need, for example, Expenses Reimbursement.

Feature-Specific Templates

You create your own workflow and examine the ST feature that you want to add to your workflow, such as Grids. Take a look at the properties, markup, etc., and implement the feature in your workflow as necessary.

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