

An Example Shared Service Application Built Using ProceSSION

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Background

In discussion with HMG Skunkworks on 23rd of June 2011 it was mentioned that there was a need to gain better control and knowledge of the allocation of mobile equipment to civil servants throughout Government. With the understanding of ProceSSION, which places emphasis on supporting people at work, it was suggested a good way to quickly build up this “asset register” was to do a “bottom up” approach by placing responsibility on the user to register such equipment. The result would be an accurate and dynamic register of actually deployed equipment.

This document shows a “first cut” of this application, developed to demonstrate ProceSSION’s capability in addressing a pan-Government, shared service requirement such as this. The actual application was demonstrated at HMG Skunkworks on 20th of July, after just 12 man-days effort to build, from this basic idea. It includes six AJAX intelligently linked grids within the user forms, to facilitate ease of use and ensure once only entry of information.

The application was built to handle any type of deployed asset, including software, which was subsequently mentioned as a requirement by the Chief Procurement Officer. The resultant savings across Government, from having the knowledge to aid better decision making, and one low-cost application deployed, could be significant.

Because of the demonstrated shared service approach that ProceSSION is ideally suited to, this could easily be extended across local Government, with the same benefits.

However, this is only one example of how the shared service approach, with ProceSSION’s inbuilt agility and speed to build and deploy, could be of great advantage.



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A Shared Service Asset Management System

Overview

A simple application was developed to demonstrate Procession's capability in addressing a cross-government (shared service) requirement to record all personal assets allocated to employees.

The content of this document describes the maintenance of data, how an employee registers assets, and reporting on the assets registered, and also provides an example of just one of many possible associated processes built in Procession's graphical development environment.

In order to effect a demonstration several basic elements were entered into the system, including Departments, Roles, Users, Manufacturers, Equipment Types and Models. The roles describe what each user is allowed to control within the system. Any user can have many roles and a role can be allocated to many users. The system is set up to be cross-government, allowing filtering by departments or any other level of granularity required.

This document shows the following aspects of the application which was created with Procession:

1. A look at the components of the registration process
2. The lost/stolen asset process
3. The login screen
4. The dynamically populated home page
5. The process to register assets
6. An automated email confirmation
7. An example dashboard report
8. Reference data maintenance pages
9. Example setup of departments, roles and users
10. The database design



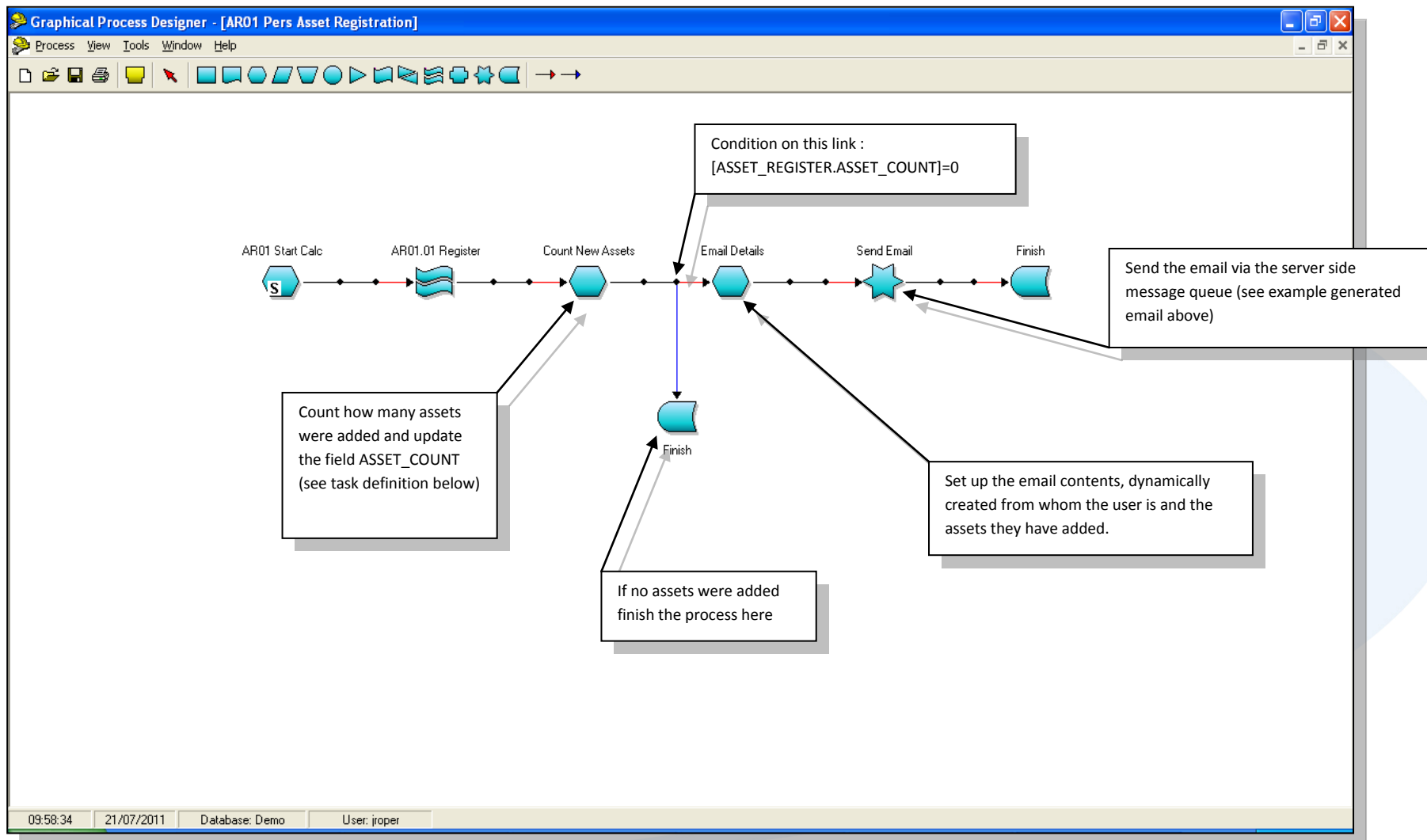
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The Asset Registration Process

The application was created using Procession's Graphical Process Designer. The asset registration process is shown below, with some explanations of the aspects of the process.



The detail of the Count New Assets calculation task is shown below, where the system will count the assets just entered by the User:

The screenshot displays the Graphical Process Designer interface for the process '[AR01 Pers Asset Registration]'. The main workspace shows a process flow starting with 'AR01 Start Calc', followed by 'AR01.01 Register', 'Count New Assets', 'Email Details', 'Send Email', and finally 'Finish'. The 'Count New Assets' task is highlighted with a dashed box and a callout line pointing to the 'Task Details' dialog.

The 'Task Details' dialog for the 'Count New Assets' task includes the following information:

- Name:** Count New Assets
- Description:** AR01 Count New Assets Regist
- Type:** CALCULATION
- Start:**
- Auto Run:**
- Duration:** [Empty field]
- Exception Proc:** [Empty dropdown]
- Role:** LASTPERFORMER
- Urgency:** (None)
- History:**
- Wait:**
- Label position:** Above

Calculation details:

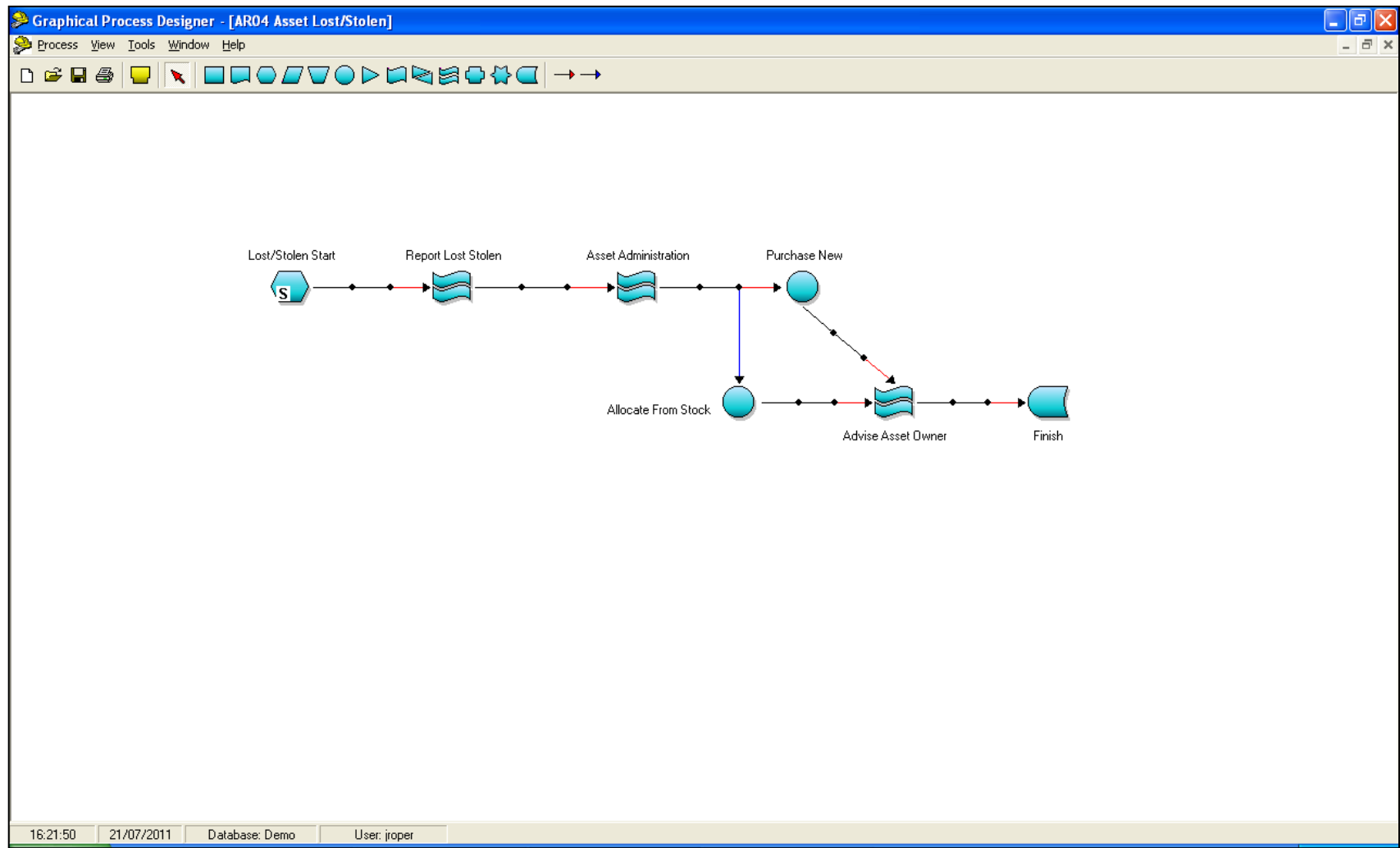
- Select task value?:**
- Name:** AR01 Count New Assets (Value: 138)
- Description:** AR01 Count New Assets Registered
- Calculation:**

```
SQL:=
update ASSET_REGISTER set
ASSET_COUNT = (select count(identifier) from
EMP_ASSETS where RUN_ID = [THISRUN]) where
IDENTIFIER = [THISRUN];
```

At the bottom of the window, the status bar shows: 10:53:05 | 25/07/2011 | Database: Demo | User: jroper

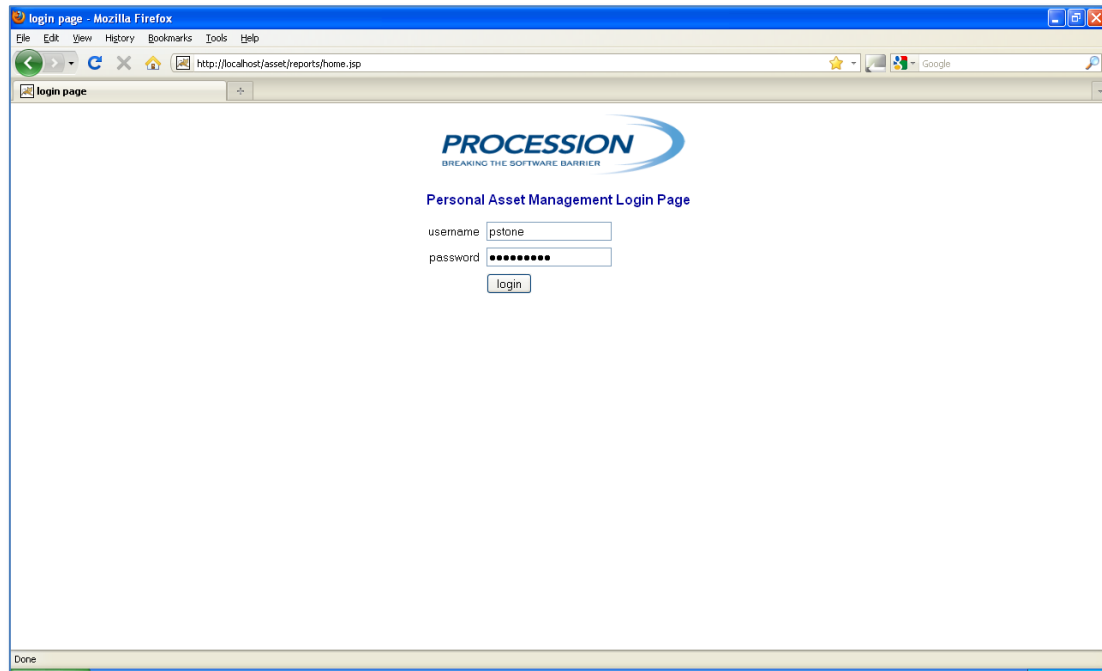
The Asset Lost or Stolen Process

One of the other processes built is shown below, this one is for dealing with replacing lost or stolen assets:



The Login Page

All users of the system are required to login. Configuration of User IDs, passwords and roles is part of ProceSSION.



Once the user has entered a valid Username and Password, they are presented with their customised Home Page.

The Home Page

When a User logs into the system, their Home Page is populated dynamically with the actions they can, based on the Roles that they have been assigned.

In the example shown below, the User that has logged in has permission to undertake five different tasks, as follows:

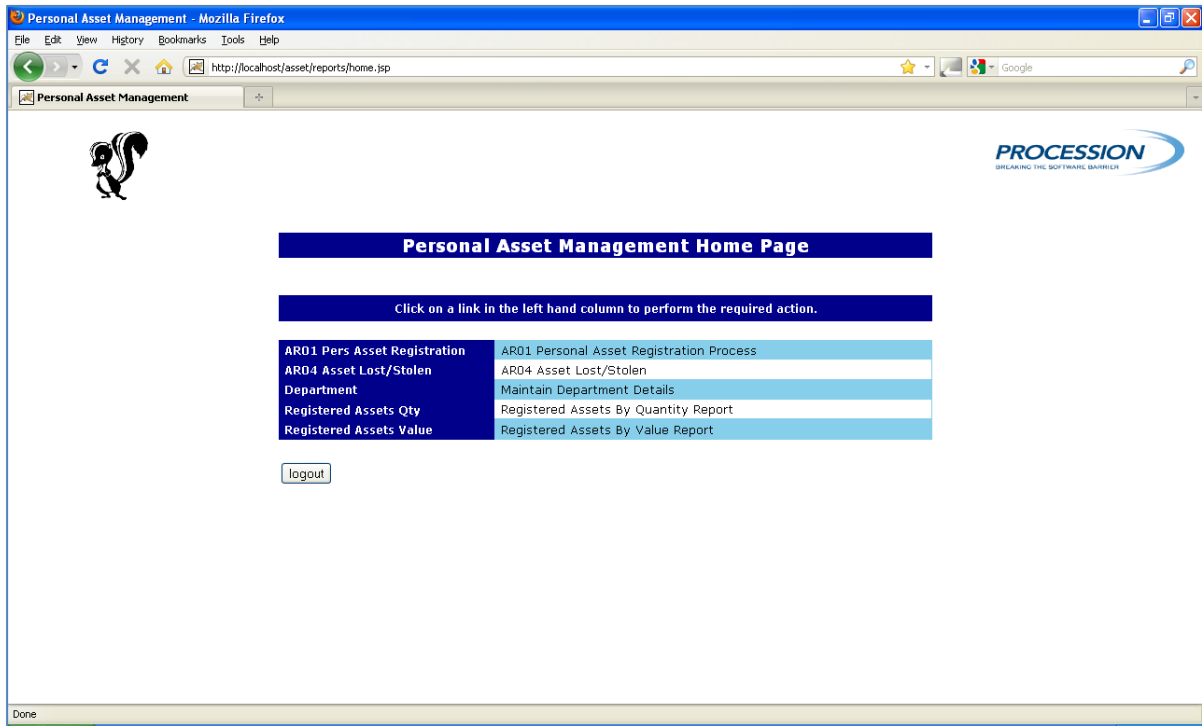
- They can run two processes
- They can maintain the department information
- They can run two types of report. These are global reports across all departments.



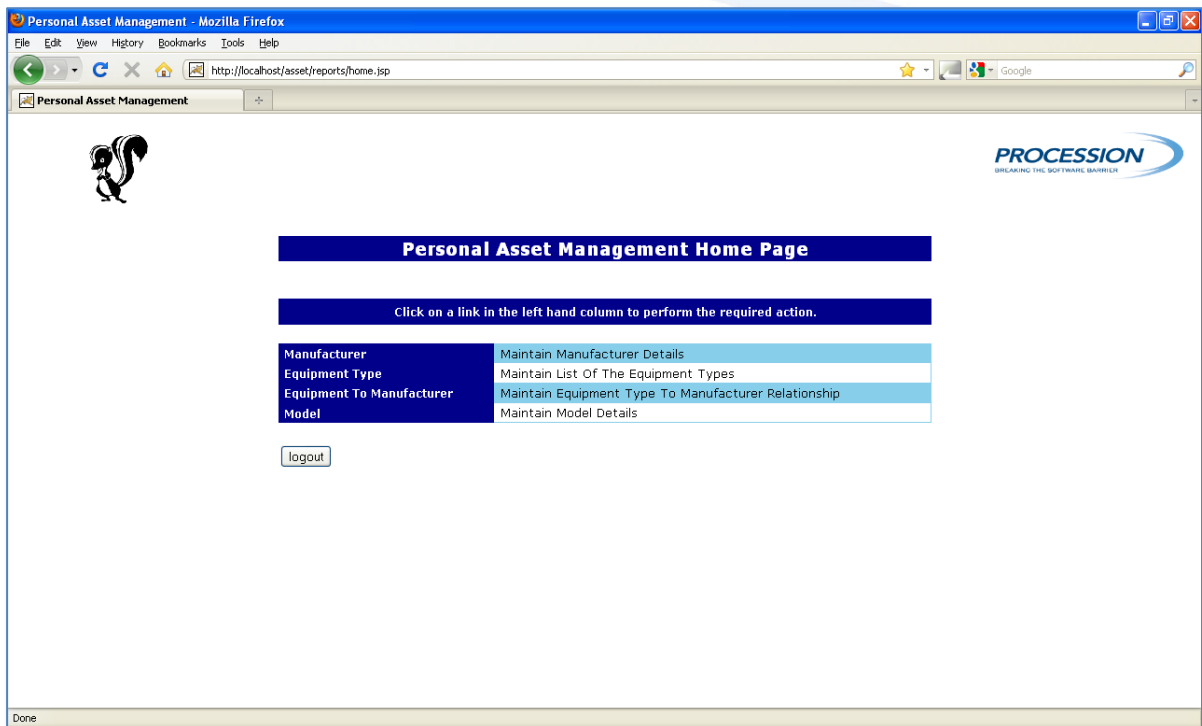
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If a user had the role of DEPT_HEAD, they would only be able to see the reports for their own department. The home page shown below is seen by a different user, who has a different set of roles defined:



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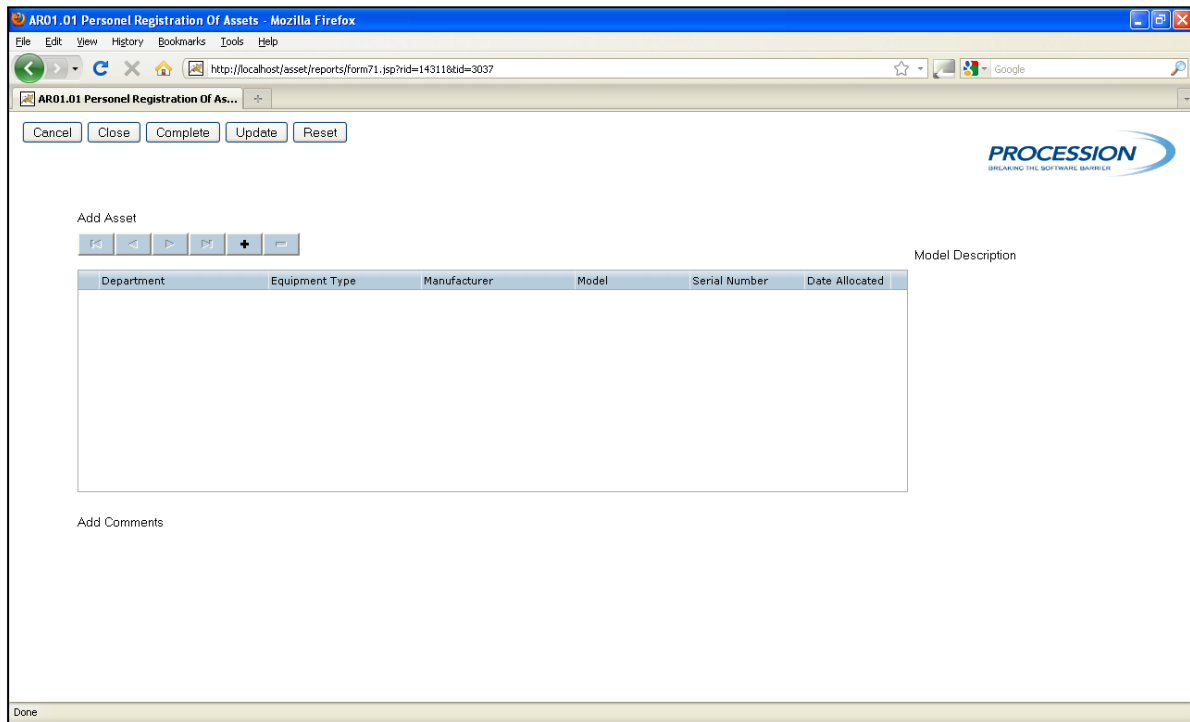
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In this case, the user has been given permission to maintain the system data for Manufacturers, Equipment Types, the relationship between Manufacturers and Equipment Type, and the Model details.

Registering Assets

By clicking on the Personal Assets Registration Process, the user will be presented with the following screen. The Add Asset grid will be empty initially. To add an asset the user clicks on the Add button, which is a plus sign.



Having clicked the Add button, the grid will then be populated with intelligently linked lookups that filter each other depending on the selection made. If the user selects Tablets from the equipment type dropdown list, then only the manufacturers that provide tablets will be displayed.

ProceSSION has its own dynamic HTML grid technology, which utilises AJAX. This enables very easy-to-use data entry screens, as shown below, and means that transactional management is under complete control, without the need for round trips to the server.

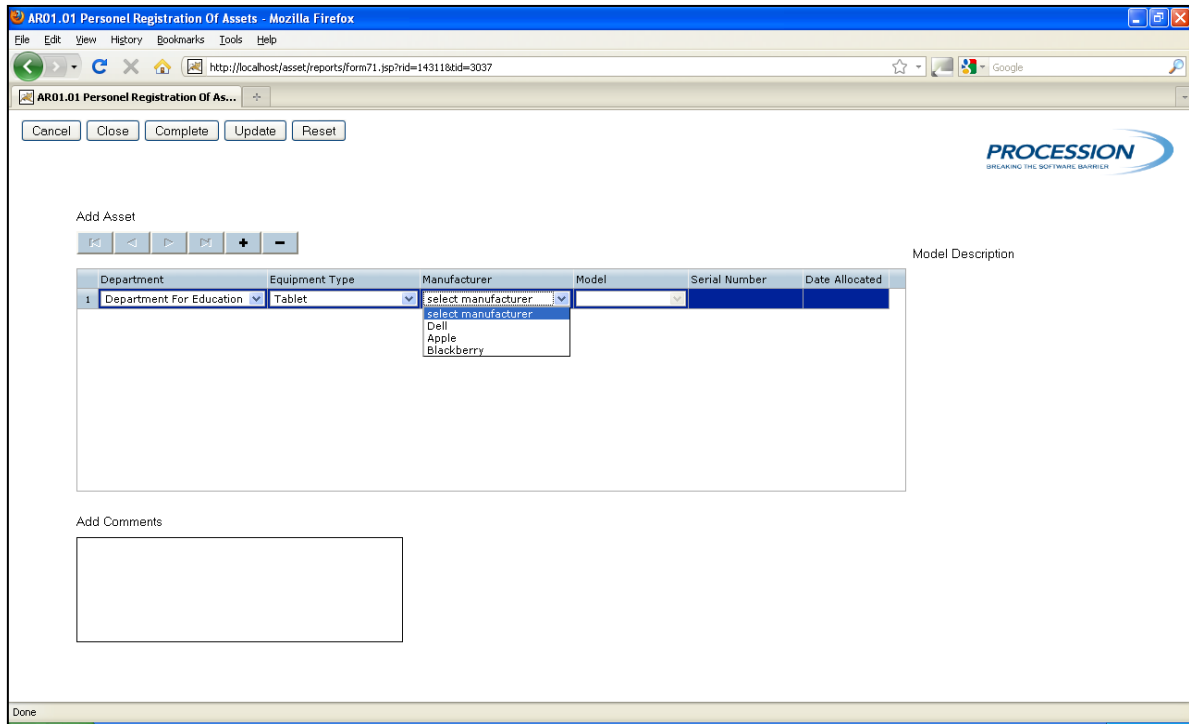
The ProceSSION Process Engine knows who is running a particular process and what stage they are at in that process. This means that a user can stop anywhere in a process and return to pick up where they left off.



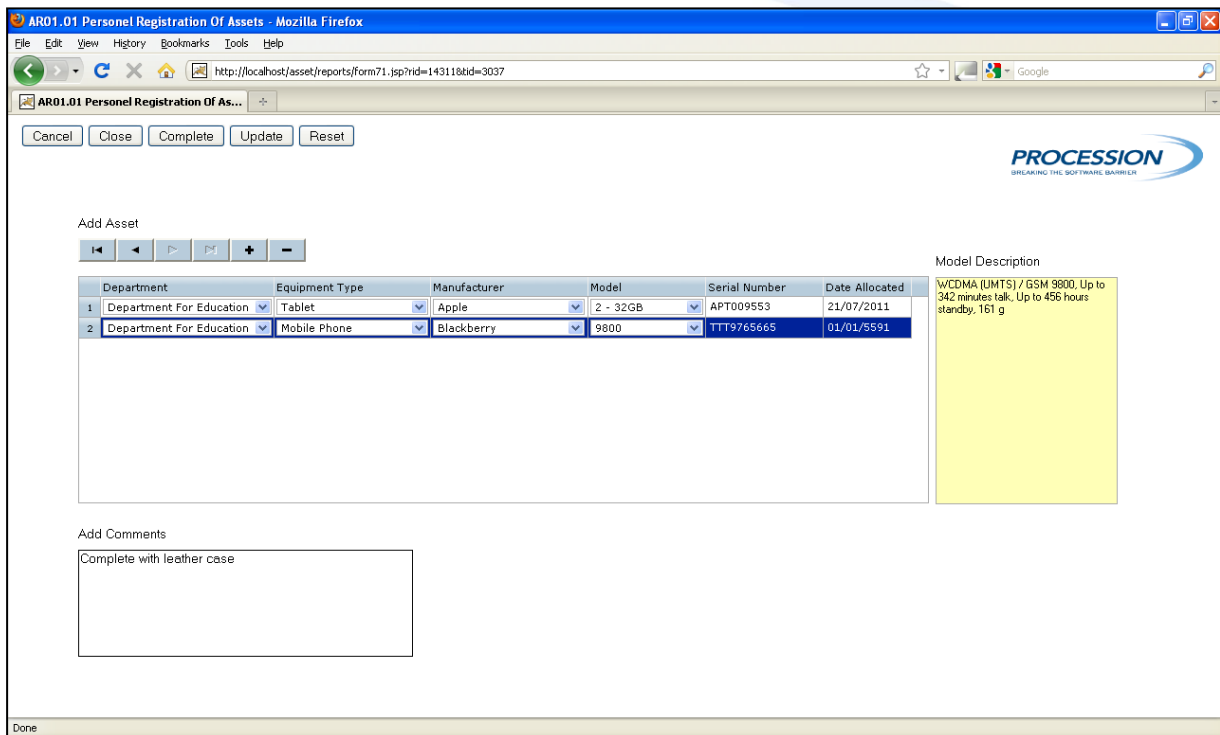
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When the user selects the manufacturer they can then select the relevant model. A description will appear which may help the user identify the piece of equipment they are registering:



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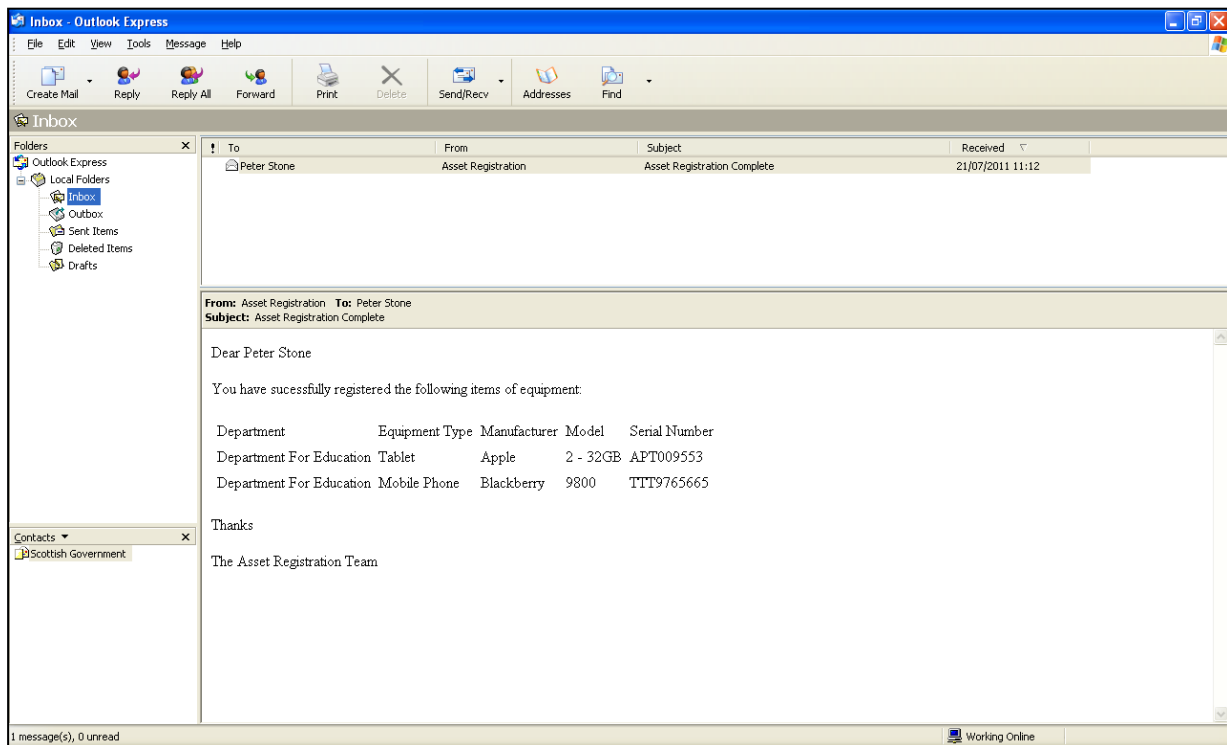
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Information could be included to help locate the serial number, etc. The user can add any comments they feel are appropriate about the piece of equipment they are registering.

One or more pieces of equipment can be added at this stage, Serial numbers and date of allocation are also entered. When the user is satisfied they then press the complete button. If no items are added nothing else happens.

Automated e-mail confirmation

If they have added equipment to the asset register, then the system will generate and send them a confirmation email.



The user will then be returned to the homepage, where they can select to run a report, or run a maintenance function.

Dashboards and Reporting

A typical dashboard style reports is shown below, using ProceSSION's built-in reporting tool. This allows a number of different charts to be defined and dynamically displayed, which can also allow interaction, such as drill-down facilities, if required.

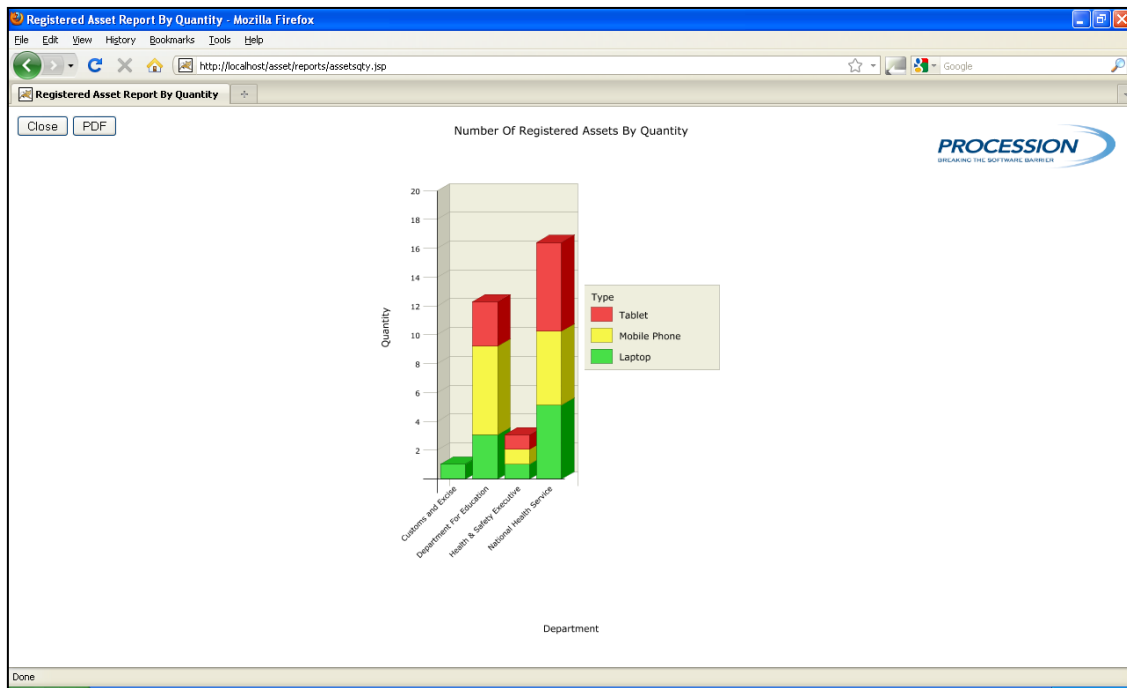
This example shows the number of registered assets by department:



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Maintenance Pages

Maintenance pages were created using Proccession, allowing the reference data within the system to be easily created and amended.

Any updates made to any of the grids are preserved until the user presses one of buttons at the top of the page, as follows:

- Cancel – cancels any changes and returns the user to the home page.
- Close – updates the database with any changes made and then closes the form.
- Update – updates the database and refreshes the form, with the form remaining open.
- Reset – reloads the form with the previously saved data, which cancels any changes made, and keeps the form open.

These buttons are standard Proccession functionality that can be added or removed from specific forms, based on user requirements.



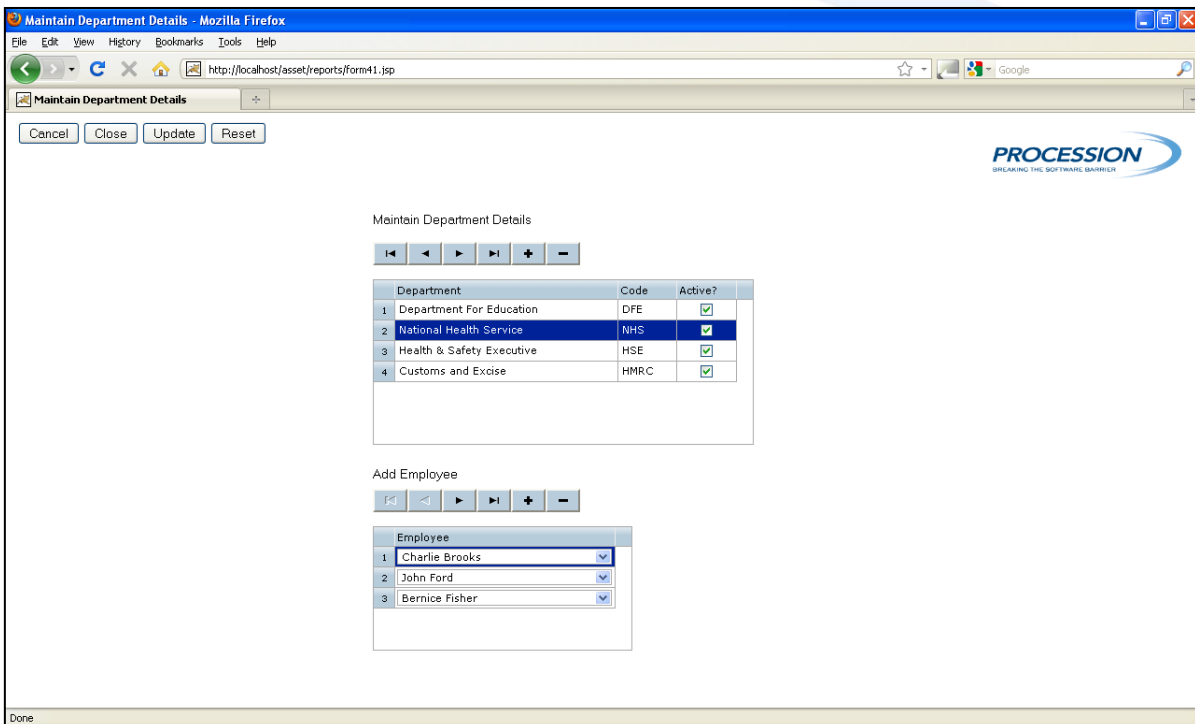
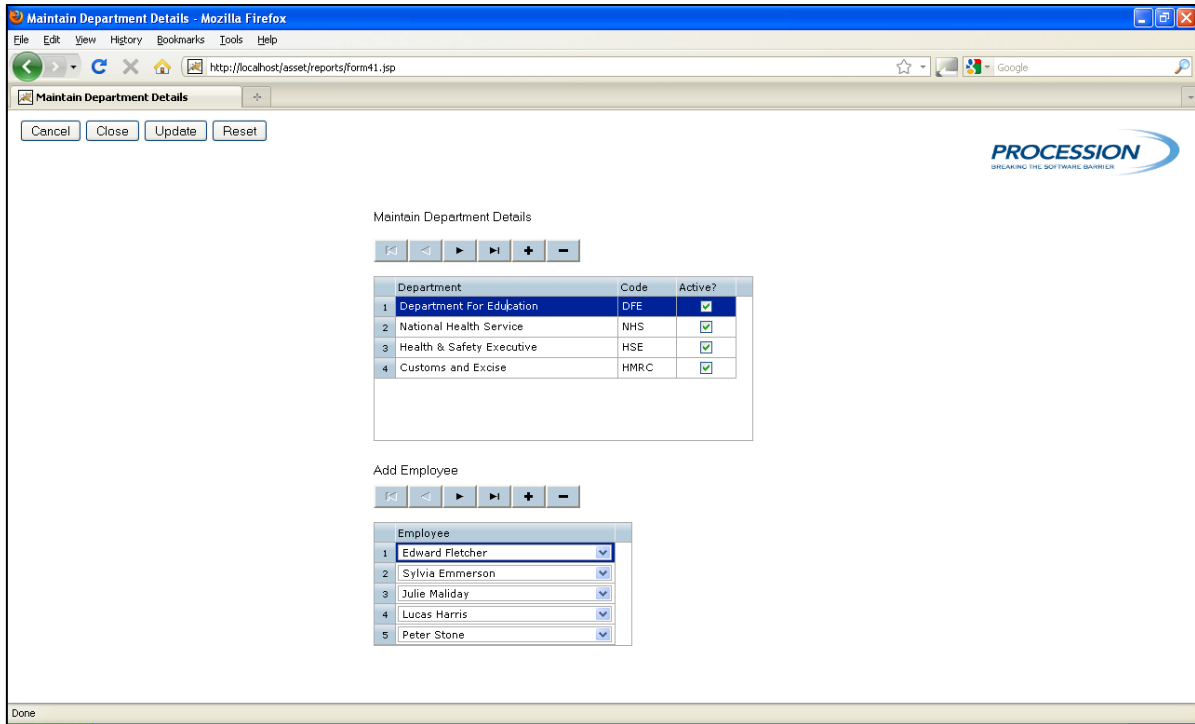
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Department Maintenance

These tables are intelligently linked together. By changing the selection in the Department grid the content of the Employee grid is then populated with the linked data, as shown here:



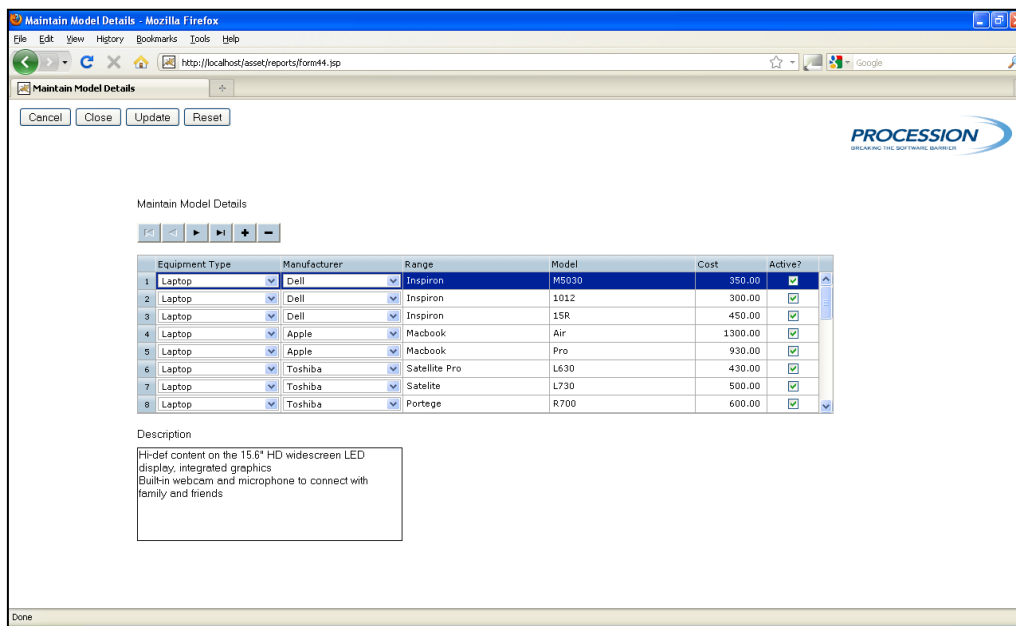
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Model Maintenance

In this case, the user can maintain the list of Models by selecting from the lists of Equipment Types and Manufacturers. Because the relationship between Manufacturers and Equipment Types is entered separately, data entry is kept as straightforward as possible.



Maintain Model Details

Cancel Close Update Reset

PROCESSION
BREAKING THE SOFTWARE BARRIER

Maintain Model Details

Equipment Type	Manufacturer	Range	Model	Cost	Active?
Laptop	Dell	Inspiron	M5030	350.00	<input checked="" type="checkbox"/>
Laptop	Dell	Inspiron	1012	300.00	<input checked="" type="checkbox"/>
Laptop	Dell	Inspiron	15R	450.00	<input checked="" type="checkbox"/>
Laptop	Apple	Macbook	Air	1300.00	<input checked="" type="checkbox"/>
Laptop	Apple	Macbook	Pro	930.00	<input checked="" type="checkbox"/>
Laptop	Toshiba	Satellite Pro	L630	430.00	<input checked="" type="checkbox"/>
Laptop	Toshiba	Satellite	L730	500.00	<input checked="" type="checkbox"/>
Laptop	Toshiba	Portege	R700	600.00	<input checked="" type="checkbox"/>

Description

Hi-def content on the 15.6" HD widescreen LED display, integrated graphics
Built-in webcam and microphone to connect with family and friends

Done

This reference data is used in the asset registration process and allows the employee to select from the above list only valid models.



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Appendix A – Asset Management Example Configuration

Some example Departments, Roles and Users were setup, as shown in this section.

DEPARTMENTS

Department for Education (DFE)
 National Health Service (NHS)
 Customs and Excise (HMRC)
 Health & Safety Executive (HSE)

ROLES

DEPT_HEAD	Allocate employees to the department
EMPLOYEE	Self registration of assets process
ADMIN_ASSET	Maintain manufacturers, equipment types, models and equip type to man relationship
ASSET_MAINT	Application designer - maintain roles to URLs and status types
HR_ASSET	Allocate department heads to departments

USERS

<i>User Name</i>	<i>Roles given</i>
pstone	HR_ASSET, EMPLOYEE
cbrooks	DEPT_HEAD, EMPLOYEE (NHS)
efletcher	DEPT_HEAD, EMPLOYEE (DFE)
asmith	DEPT_HEAD, EMPLOYEE (HSE)
dcooper	DEPT_HEAD, EMPLOYEE (HMRC)
jroper	ASSET_MAINT
smason	ADMIN_ASSET
jmaliday	EMPLOYEE (DFE)
semmerson	EMPLOYEE (DFE)
lharris	EMPLOYEE (DFE)
jford	EMPLOYEE (NHS)
bfisher	EMPLOYEE (NHS, HSE)



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Appendix B – Asset Management Data Design

