BPA10: WFD Quick Reference Guide
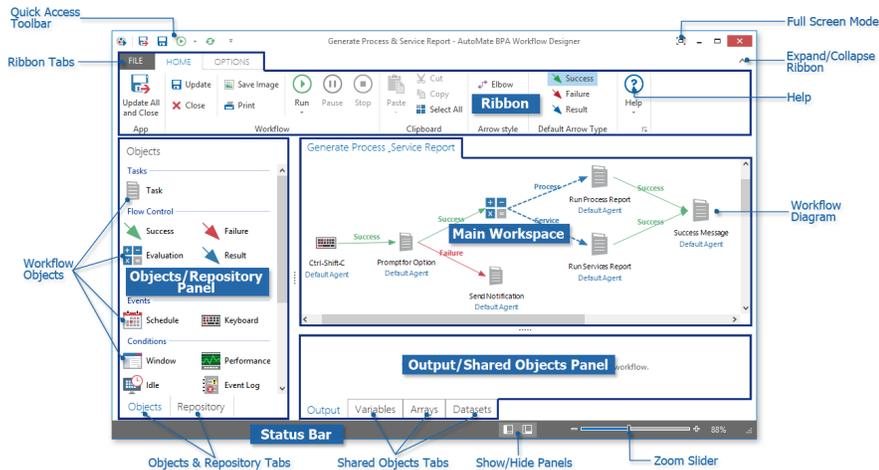
AutoMate
B P A   S e r v e r

Workflow Designer

To open Workflow Designer:

1. From Server Management Console, select **Workflows** on the Navigation Bar.
2. Do one of the following:
   - Select a workflow and click **Edit** on the Top Panel.
   - Right-click a workflow and select **Edit** from the context menu.

To create a new workflow object:

1. From Workflow Designer's Objects/Repository panel, select the **Objects** tab.
2. Drag the desired object onto the workspace or simply double-click the object.
3. Enter a unique name for the new object.
4. Assign an agent for the object (if applicable).
5. Double-click the object to view or edit its properties (if applicable).

To add an existing workflow object:

1. From the Objects/Repository panel, select the **Repository** tab. The panel becomes populated with existing workflow objects categorized by folders/subfolders.
2. Drag a repository object onto the workspace or simply double-click the object.
3. Once added to the workspace, if necessary, you can double-click the object to view/edit its properties.

Run Options

The various run options dictate how workflow execution should commence after a breakpoint is encountered. Details about each option are as follows:

Run from here: Runs the workflow from the currently selected object.

Resume: Resumes execution from where the breakpoint was initially encountered.

Step: Steps through each ensuing workflow item. When you click the **Step** button or press F10, WFD runs the next object then pauses. When you're ready to proceed, click **Step** or F10 again to run the next object, and so on.

Stop: Halts execution at the current object and logs status as success.

SHARED OBJECTS

Shared objects are variables, arrays, or datasets that are accessible throughout an entire workflow. A shared object's value can be read by any object and modified by other tasks contained in the workflow.
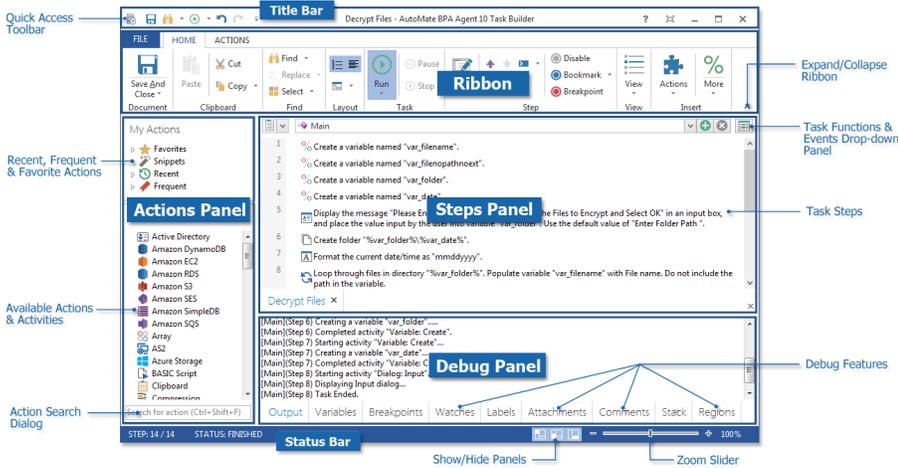
To declare an object as shared:

1. At the foot of the Output/Shared Objects panel, select the tab (Variables, Arrays, or Datasets) corresponding to the object you wish to share.

2. Right-click anywhere inside the panel and select **Add** [Object] where Object is the type of the object that corresponds to the selected tab (Variables, Arrays, or Datasets).

3. Enter its properties and click **OK** upon completion.

KEYBOARD SHORTCUTS

F1	Open help topic
F5	Refresh
F9	Add breakpoint
Ctrl+A	Select all
Ctrl+C	Copy
Ctrl+V	Paste
Ctrl+I	Save image
Ctrl+P	Print workflow
Ctrl+S	Update
Ctrl+F5	Run workflow
Ctrl+F4	Close WFD
Ctrl+F1	Collapse ribbon
Delete	Delete selected
Ctrl+Plus	Zoom in
Ctrl+Minus	Zoom out
Shift+Alt+F5	Pause execution
Shift+Alt+F4	Update & close
Ctrl+Shift+F5	Stop execution
Ctrl+Shift+G	Default arrow: Success
Ctrl+Shift+R	Default arrow: Failure
Ctrl+Shift+B	Default arrow: Result

Task Builder Basics

Quick Access Toolbar
Title Bar
Ribbon
Expand/Collapse Ribbon
Task Functions & Events Drop-down Panel
Recent, Frequent & Favorite Actions
Actions Panel
Steps Panel
Task Steps
Available Actions & Activities
Debug Panel
Debug Features
Action Search Dialog
Status Bar
Show/Hide Panels
Zoom Slider

To open Task Builder in SMC:

From the Repository section, do one of the following:

- Select a task and click **Edit** on the Top Panel.
- Right-click a task and select **Edit** from the context menu.

To open Task Builder in WFD:

1. Ensure the task you wish to edit is contained in the current workflow diagram on the workspace.
2. Do one of the following:
   - Double-click the task
   - Right-click the task and select **Edit** from the context menu.

To find available actions/activities:

1. In Task Builder, click inside the Search dialog or press Ctrl+Shift+F on your keyboard.
2. Enter all or part of an action's name. The list is updated as you type each letter.

To save your task:

On the Quick Access Toolbar, click **Save** or press Ctrl+S.

To add a variable:

Do one of the following:

- From the Actions panel, drag the Create variable activity onto the Steps panel.
- Click **% More > % Add Variable** on the ribbon.

To add steps:

1. Drag an action/activity from the Actions panel onto the Steps panel or simply double-click the action/activity.
2. Enter required action properties and click **OK**. The action then becomes a step in your task.

To run one or more steps:

- To run all steps, click **Run All** on the ribbon or press F5.
- To run selected steps, select the desired steps (hold down Ctrl during selection) and click **Run Selected** or press Ctrl+F5.
- To run from a specific step, select the step and click **Run From Here** or press Ctrl+Shift+F5.
- To run each step one by one, click **Step** or press F9. Do the same to run the next step and each subsequent step thereafter.

KEYBOARD SHORTCUTS (CONT.)

Shortcut	Action
F1	Help topic
F3	Next bookmark
F5	Run all steps
F6	Pause
F8	Add breakpoint
F9	Step through
Ctrl+A	Select all
Ctrl+C	Copy
Ctrl+F	Find
Ctrl+G	Select step number
Ctrl+H	Find and replace
Ctrl+L	Select label
Ctrl+N	Create new task
Ctrl+R	Create region
Ctrl+S	Save task
Ctrl+V	Paste
Ctrl+Y	Redo
Ctrl+Z	Undo
Ctrl+F2	Stop/reset
Ctrl+F5	Run selected
Ctrl+Shift+F5	Run from here
Ctrl+Alt+C	Add comment
Ctrl+Alt+V	Add variable
Ctrl+Shift+F	Find action/activity
Ctrl+Up	Move line up
Ctrl+Down	Move line down
Ctrl+Left	Increase indent
Ctrl+Right	Decrease indent
Shift+C	Collapse all regions
Shift+E	Expand all regions