# Kriya - User Manual

**Prepared By :** Discus Business Solution discus business solutions

**Table of Contents**

# Framework

## 1. What is an Application?

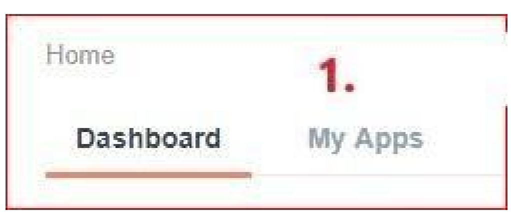
- An application is a comprehensive, self-contained program that performs a particular function directly for the user. In Kriya, Users can create applications consisting various processes which can be viewed by mapped users on which various actions/tasks can be performed.

## 2. What is a Process? How does it relate to an Application?

- Process is a part of application.
- Users can create multiple processes and map users and roles and permissions for each process which can be mapped in a single application.

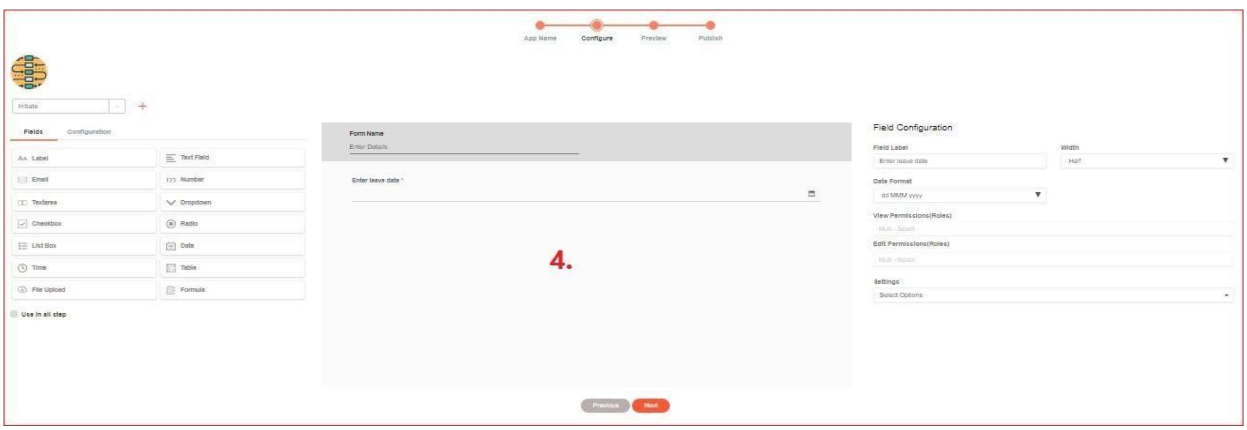
## 3. How can I create and deploy a new Process?

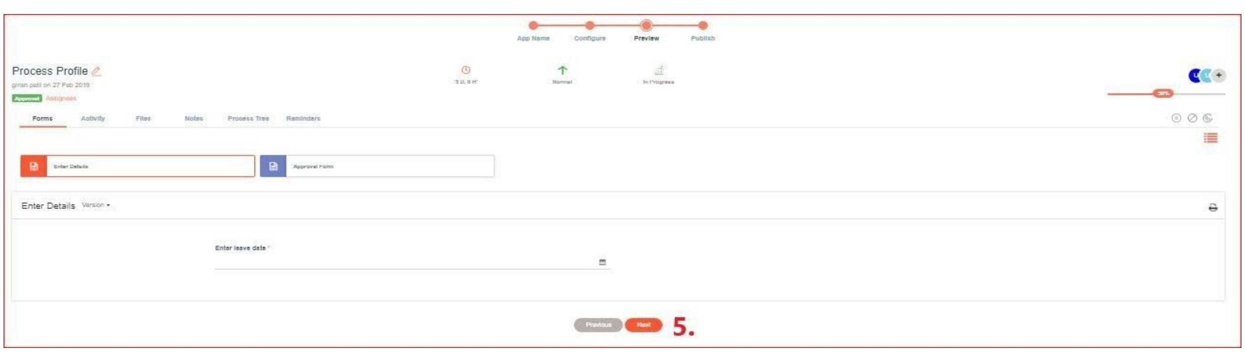
1. Click on My Apps on Home screen
2. Click on Create your own app
3. Enter name of the App and the Process and click on Next
4. Create sample forms and click on Next
5. Review your created process and click on Next
6. If all the details are proper, user can either publish the process or click on Save as Draft for future changes.

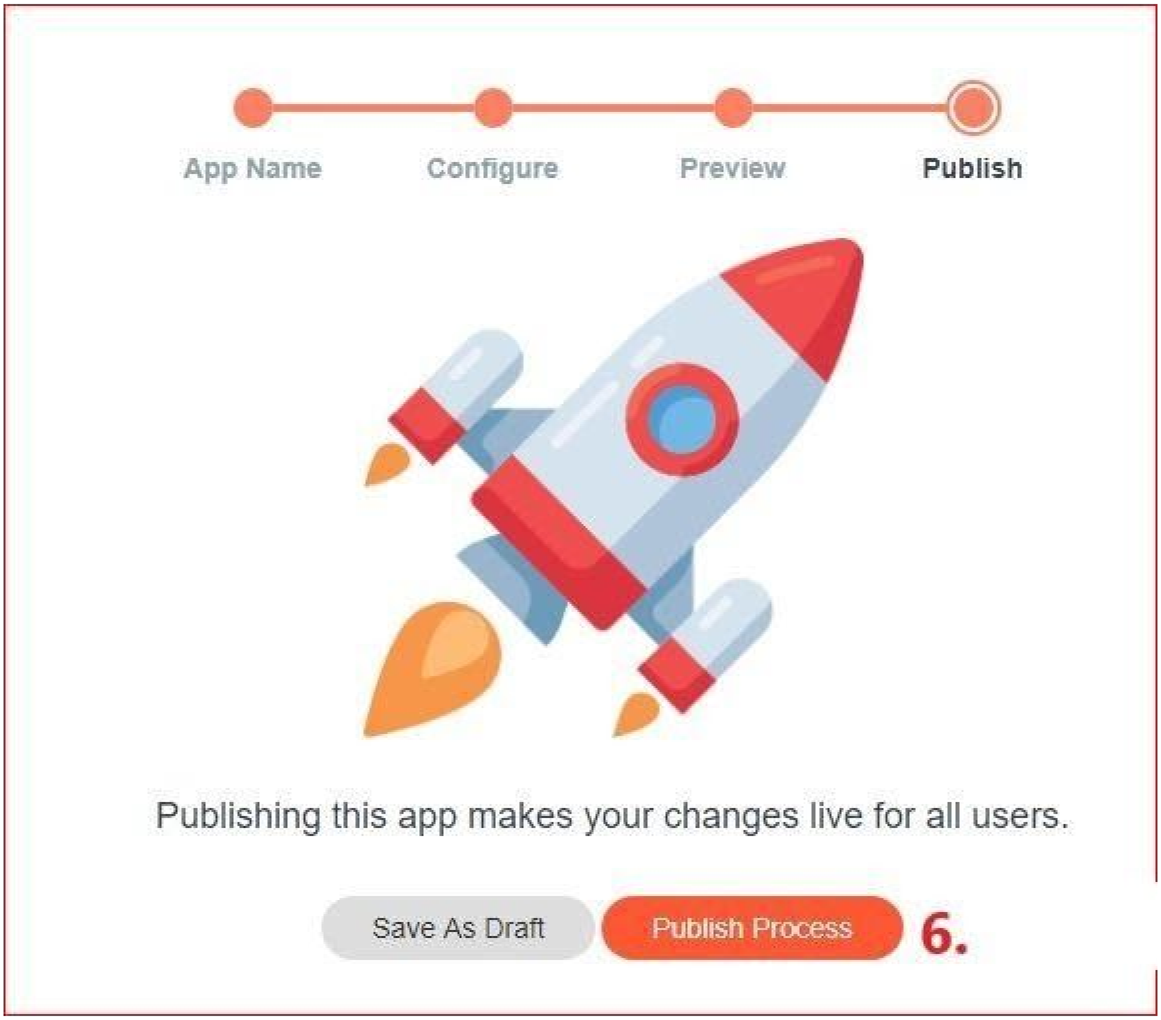



2.
Create Your
Own App


App Name
Configure
Preview
Publish
3.
HR
Leave Requisition
Next


App Name
Configure
Preview
Publish
Fields
Configuration
Label
Text Field
Email
Number
Textarea
Dropdown
Checkbox
Radio
List Box
Date
Time
Table
File Upload
Formula
Use in all step
Form Name
Enter Details
Enter leave date
4.
Field Configuration
Field Label
Width
Date Format
View Permissions(Roles)
Edit Permissions(Roles)
Settings
Select Options
Previous
Next


App Name
Configure
Preview
Publish
Process Profile
Forms
Activity
Files
Notes
Process Tree
Reminders
Enter Details
Approval Form
Enter Details
Enter leave date
Previous
Next
5.




## Sample Process Configuration details

- On the configuration screen, there are multiple options available to configure.

1. Process Steps
   - There are 3 steps available by default. Individual forms can be configured on each step using different fields.
2. Fields
   - There are multiple options available to design a form:
     - ❖ Label - Label of the form can be mentioned
     - ❖ Text Field - Text details can be mentioned
     - ❖ Email - email addresses can be mentioned
     - ❖ Number - only numbers can be mentioned
     - ❖ Textarea - users can enter text in this field
     - ❖ Dropdown - dropdown can be configured here with multiple options

- Checkbox - multiple options with checkbox can be mentioned
- Radio - radio buttons(Yes/No) type of field can be mentioned
- List Box - similar to drop-down, multiple options can be selected in this type of field
- Date - date selector can be configured
- Time - time selector can be configured
- Table - table can be created with multiple options
- File Upload - file upload selector can be configured
- Formula - formula field, reading data from another field can be configured with this type of field

## Label

Text - enter text

Text Color - select text color

Align - alignment of text

Width - 2 options - Full would cover whole form. Half would cover half form horizontally

Font size - select font size

Font style - 3 styles - Bold,Italic and Underline

Tool Tip - on hover of field would display this text

Background - select background of label

## Text Field

Field Label - label of the field

Placeholder - text shown in the background of this field

Width - 2 options - Full would cover whole form. Half would cover half form horizontally

Tool Tip - on hover of field would display this text

View Permissions(Roles) - People mapped to the selected role will be able to view this field

Edit Permissions(Roles) - People mapped to the selected role will be able to edit this field

Regular Expression - regular expression for validating input

Settings - Required - Validation to make the field compulsory

## Email

Field Label - label of the field

Placeholder - text shown in background of this field

Width - 2 options - Full would cover whole form. Half would cover half form horizontally

Tool Tip - on hover of field would display this text

View Permissions(Roles) - People mapped to the selected role will be able to view this field

Edit Permissions(Roles) - People mapped to the selected role will be able to edit this field

Settings - Required - Validation to make the field compulsory discus business solutions

## Number

Field Label - label of the field

Placeholder - text shown in background of this field

Width - 2 options - Full would cover whole form. Half would cover half form horizontally
Tool Tip - on hover of field would display this text
Min - Minimum value to be entered into field
Max - Maximum value to be entered into fiel
View Permissions(Roles) - People mapped to the selected role will be able to view this field
Edit Permissions(Roles) - People mapped to the selected role will be able to edit this field
Settings - Required - Validation to make the field compulsory

## Textarea

Field Label - label of the field

Placeholder - text shown in background of this field

Width - 2 options - Full would cover whole form. Half would cover half form horizontally
Tool Tip - on hover of field would display this text
View Permissions(Roles) - People mapped to the selected role will be able to view this field
Edit Permissions(Roles) - People mapped to the selected role will be able to edit this field
Settings - Required - Validation to make the field compulsory

## Dropdown

Field Label - label of the field

Width - 2 options - Full would cover whole form. Half would cover half form horizontally
Choose Option -

- Master - Master will get data from master created in Home/Master.
- Static - Static will get data from master created in Home/Master. Static will let users put values manually where default 2 fields are provided. Users can add more by clicking on the Add button.

View Permissions(Roles) - People mapped to the selected role will be able to view this field
Edit Permissions(Roles) - People mapped to the selected role will be able to edit this field
Settings - Required - Validation to make the field compulsory

## Checkbox

Field Label - label of the field

Width - 2 options - Full would cover whole form. Half would cover half form horizontally

Choose Option - Master,Static. Master will get data from master created in Home/Master. Static will let users put values manually where default 2 fields are provided. Users can add more by clicking on Add button.
View Permissions(Roles) - People mapped to the selected role will be able to view this field
Edit Permissions(Roles) - People mapped to the selected role will be able to edit this field
Settings - Required - Validation to make the field compulsory

## Radio

Field Label - label of the field

Width - 2 options - Full would cover whole form. Half would cover half form horizontally
Name/Value - enter name to be displayed in front of the button.Users can add more by clicking on Add button.
View Permissions(Roles) - People mapped to the selected role will be able to view this field
Edit Permissions(Roles) - People mapped to the selected role will be able to edit this field
Settings - Required - Validation to make the field compulsory

## List Box

Field Label - label of the field

Width - 2 options - Full would cover whole form. Half would cover half form horizontally
Name/Value - enter name to be displayed in front of the button.Users can add more by clicking on Add button.
View Permissions(Roles) - People mapped to the selected role will be able to view this field
Edit Permissions(Roles) - People mapped to the selected role will be able to edit this field
Settings - Required - Validation to make the field compulsory

## Date

Field Label - label of the field

Width - 2 options - Full would cover whole form. Half would cover half form horizontally
Date Format - select date format from the drop down
View Permissions(Roles) - People mapped to the selected role will be able to view this field
Edit Permissions(Roles) - People mapped to the selected role will be able to edit this field
Settings - Required - Validation to make the field compulsory

## Time

Field Label - label of the field

Width - 2 options - Full would cover whole form. Half would cover half form horizontally
Time Format - select time format from the radio button

View Permissions(Roles) - People mapped to the selected role will be able to view this field
Edit Permissions(Roles) - People mapped to the selected role will be able to edit this field
Settings - Required - Validation to make the field compulsory

## Table

Text - text on the top of table
Row - number of rows in the table
Column - number of columns in the table
Width - 2 options - Full would cover whole form. Half would cover half form horizontally
Settings - 3 options
Fixed Row Header will have a text field which would be fixed in the table. Fixed Column Header will have a text field which would be fixed in the table.
Add rows runtime would give a plus(+) option where the user will be able to click on it to add rows in the form.

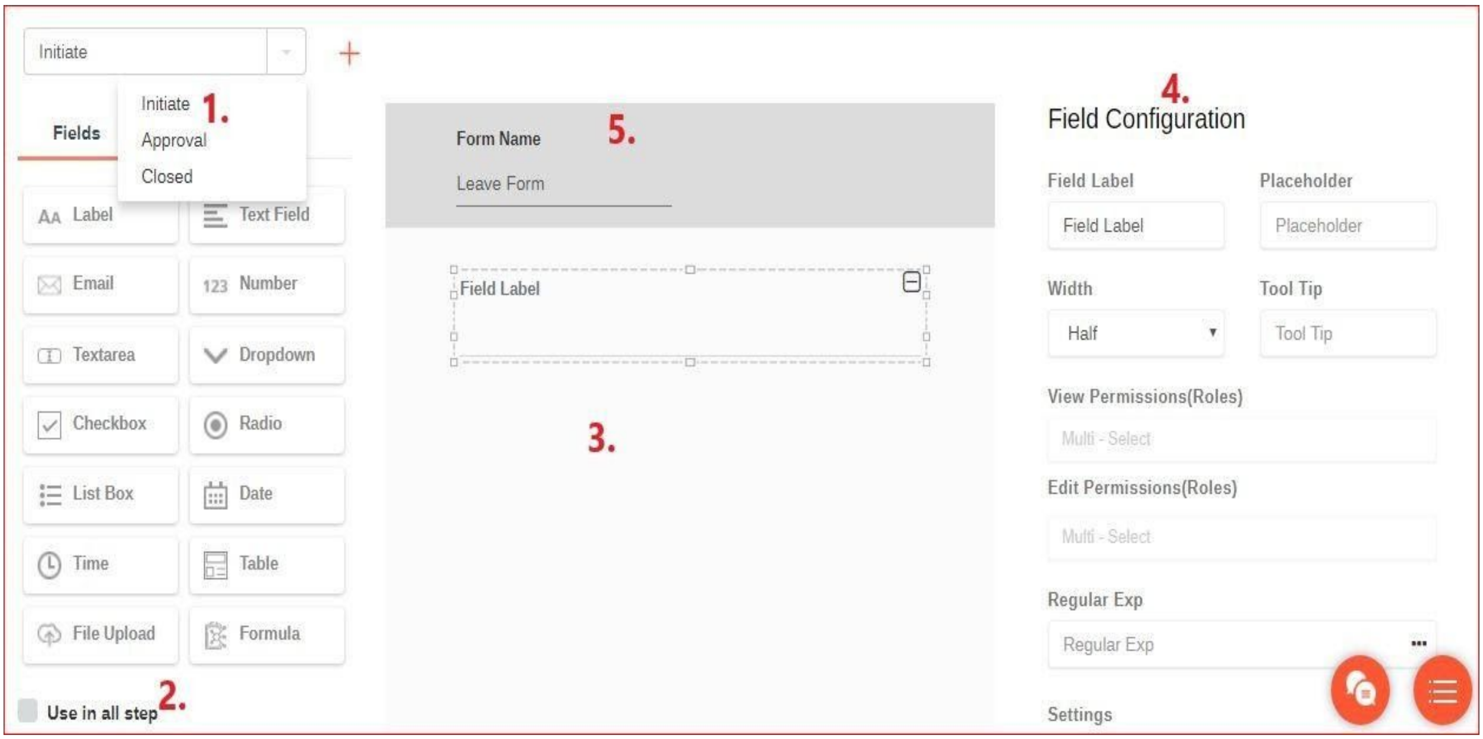
## File Upload

Field Label - label of the field
Width - 2 options - Full would cover whole form. Half would cover half form horizontally
Accept - user has to select which type documents (eg .jpeg, png, pdf) should be uploaded.
View Permissions(Roles) - People mapped to the selected role will be able to view this field
Edit Permissions(Roles) - People mapped to the selected role will be able to edit this field
Upload in - 2 options - Kriya will upload docs in Kriya. Greenbox will upload docs in Greenbox.
Settings - 3 options -
Required - Validation to make the field compulsory
Multiple Attachments - User will be able to upload multiple attachments
Upload every time - User will need to upload attachments everytime

## Formula

Field Label - label of the field
Width - 2 options - Full would cover whole form. Half would cover half form horizontally
Formula - 2 options
Number - as per field options, user will select the value where fields is the field value, Master is values selected from master, Static is static value and Table is values on which operations will be performed as per table values.
Text - as per field options, user will select the value where fields is the field value, Master is values selected from master, Static is static value and Table is values on which operations will be performed as per table values.

3. Form design workspace.The fields can be placed in this place. The look of the form is designed from this space where the fields can be dragged and dropped and moved as per requirement.
4. Field configuration
   - All the fields have their specific configuration. These configurations can be done here.
5. Form Name
   - All Forms created can be given a name in this area




## Roles & Permissions

### 4. What's a Role?

- Roles are functions allocated to specific users to perform certain functions

### 5. What is a Permission? What does each Permission mean?

- Edit Current Step Due Date - User will be able to edit the due date of the step which is assigned to him/her.
- Edit All Steps Due Date - User will be able to edit the due date of all the steps in a particular process.
- Edit Process Title - User can edit Process Title.
- Delete Process Instance - User will be able to delete the process instance.

- Publish Process - User can publish a process
- Reports - User can view and generate reports
- Enable Proofreader - User can view Proofreader reports
- View File Type - User can view file type while creating forms
- Change Priority - Change the priority of the process
- Recall Process Instance - User will be able to recall process instances created
- Start sub process - User will be able to start a sub process from Process tree tab inside the task created
- Initiate Process Instance - User will be able to initiate a process instance
- Manage role permission - Add/Update App roles and permissions
- Add participants - User will be able to add participants to the existing process
- View All Process Instance - View "All Task" option in module profile task list
- View Role - Displays roles and permissions at app level

## 8. How do I assign a Permission to a User?

1. Go to My Apps on the Home screen
2. Select the App in which permission needs to be added
3. Hover on the left pane and click on Roles and Permissions
4. Select the role on which permission needs to be added
5. Click on Mapped Users tab
6. Click on Map User button
7. Select the users which needs to be mapped
8. Click Save

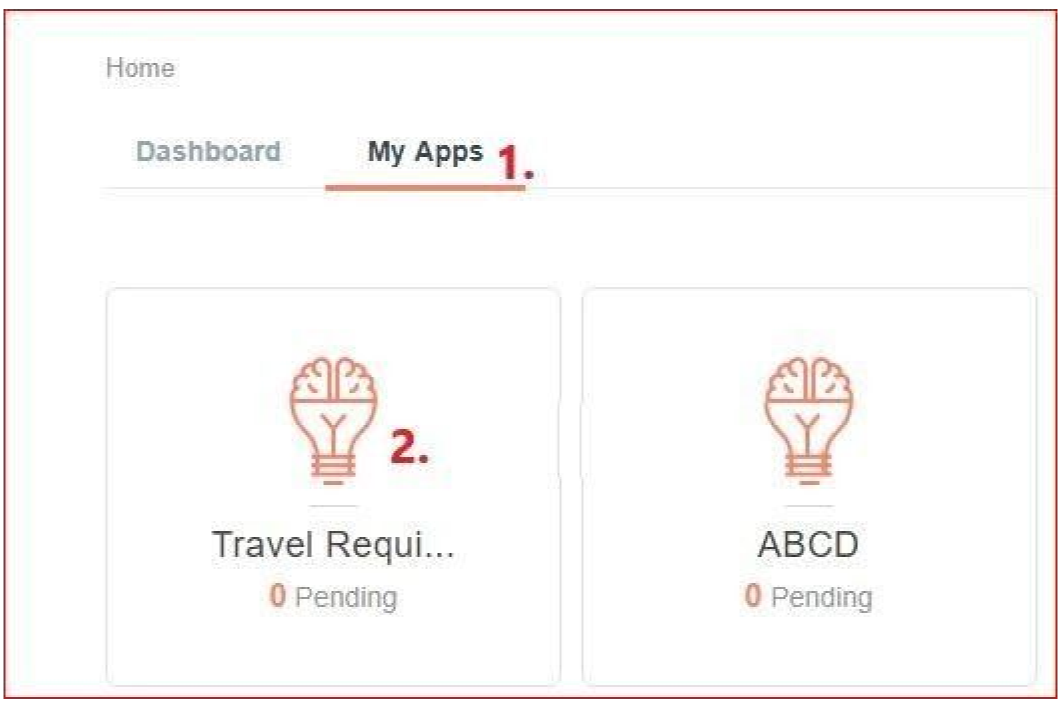


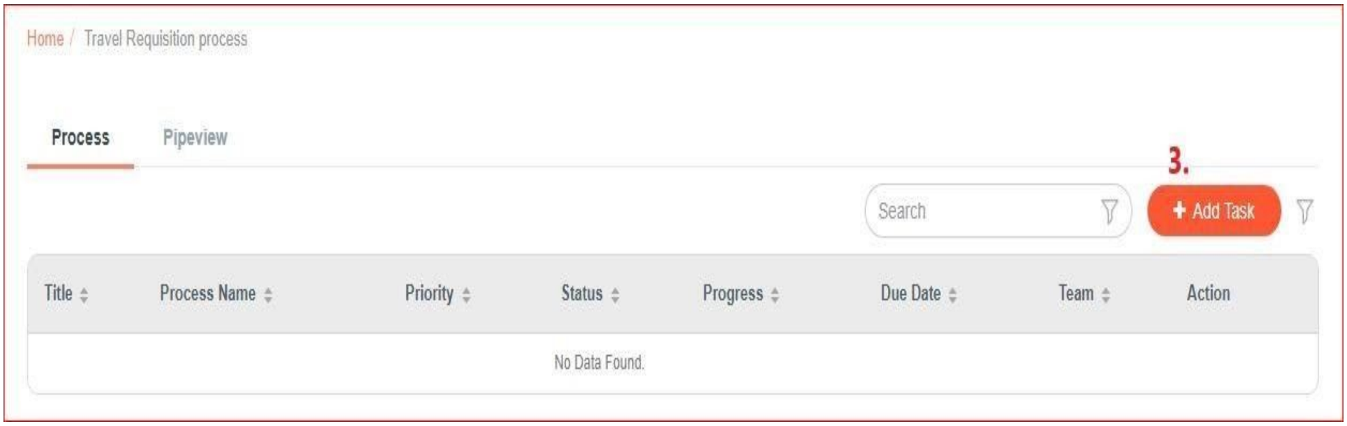
9. What is the relation between Permissions, Roles & Apps / Processes?
   - Roles and Permissions enables users to interact and perform tasks on the apps and processes.

## Tasks

10. How do I create a new Task?
    - Task is created in a process.

1. Go to My Apps on the Home screen
2. Select the App in which task needs to be added
3. Click on Add Task



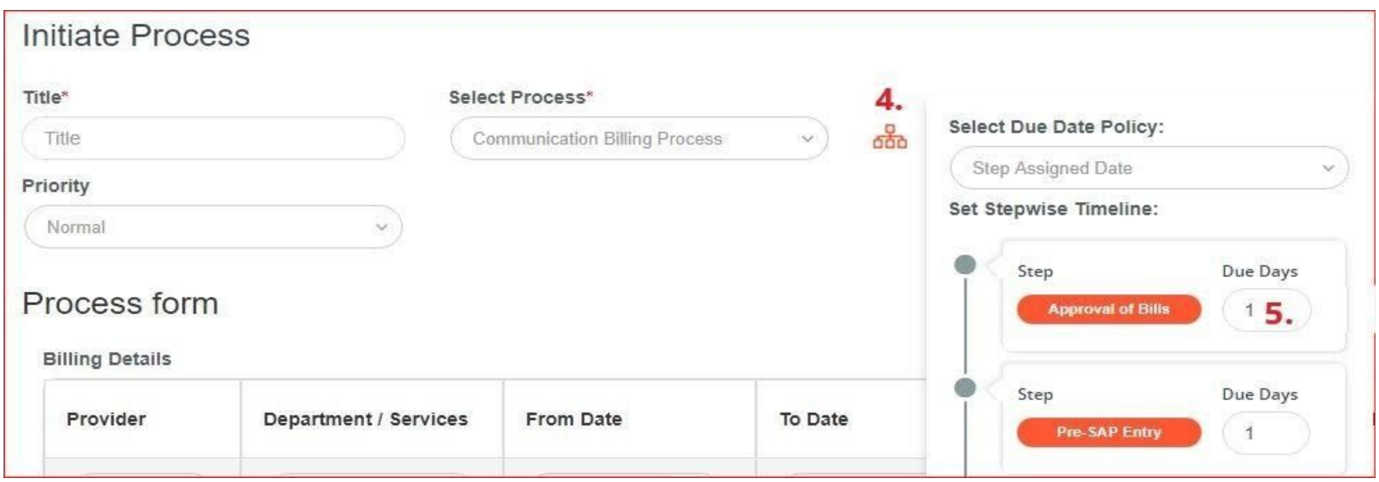



## 11. How do I set a deadline for a task's completion?

There are 2 ways this can be achieved:

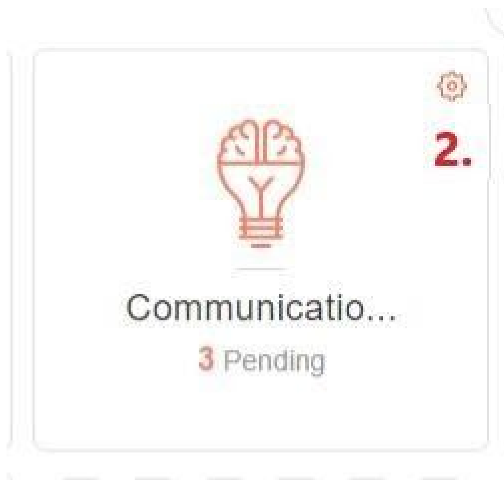
1st approach:

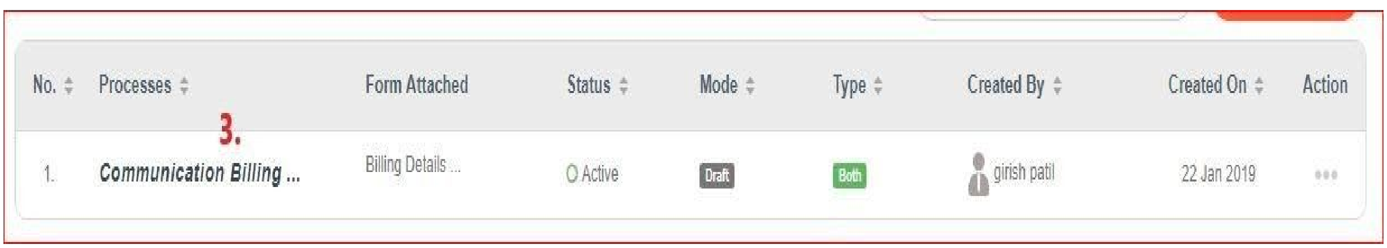
1. Go to My Apps on the Home screen
2. Select the App in which task needs to be added
3. Click on Add Task
4. Click on Set Stepwise Timeline(Hierarchical Diagram)
5. Set days in Due days section

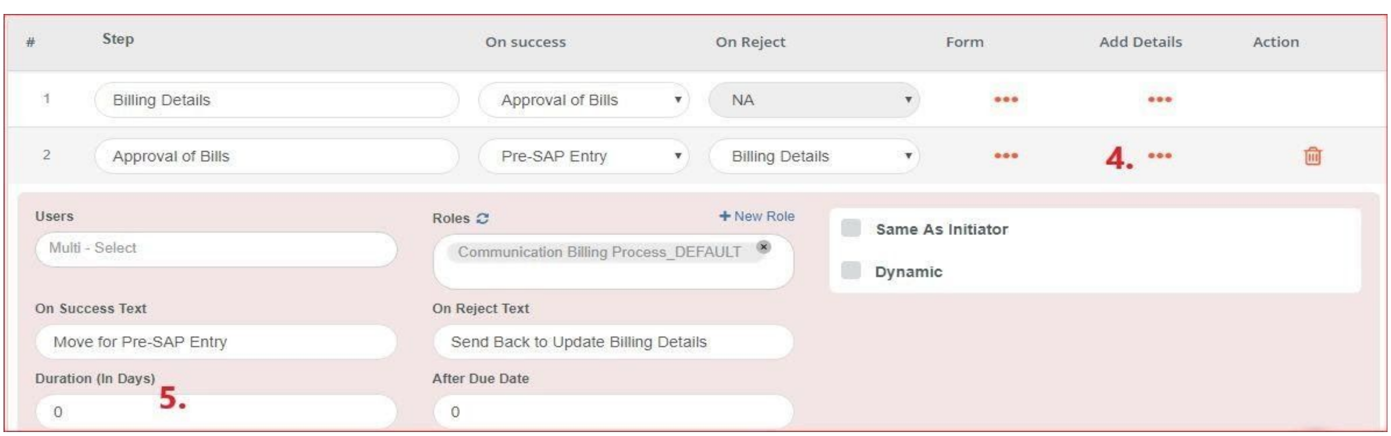


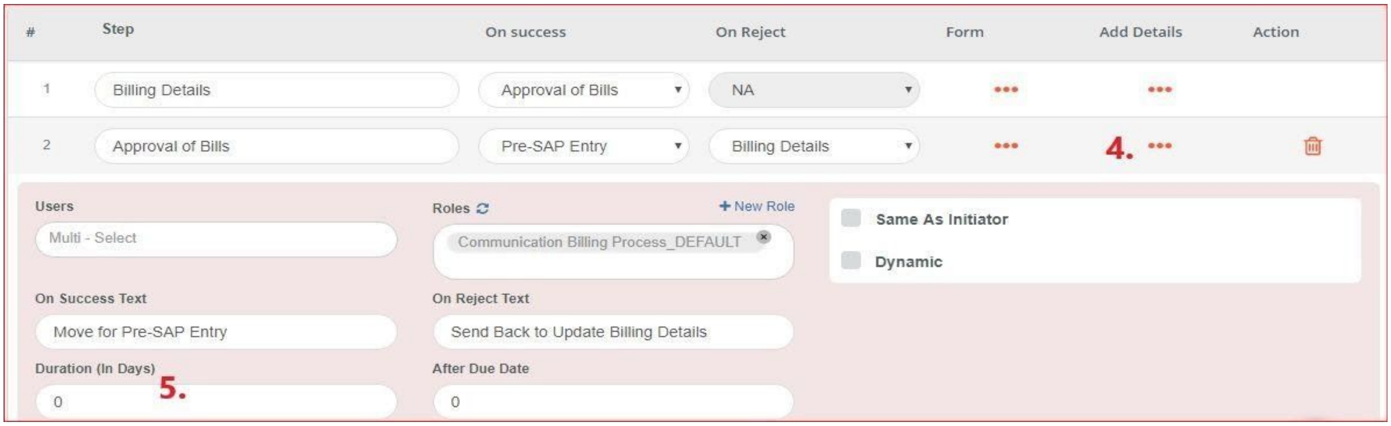
2nd approach:

1. Go to My Apps on the Home screen
2. Click on the settings button
3. Click on the process name on which deadline needs to be set
4. Click on Add Details.
5. In the Duration section enter the days



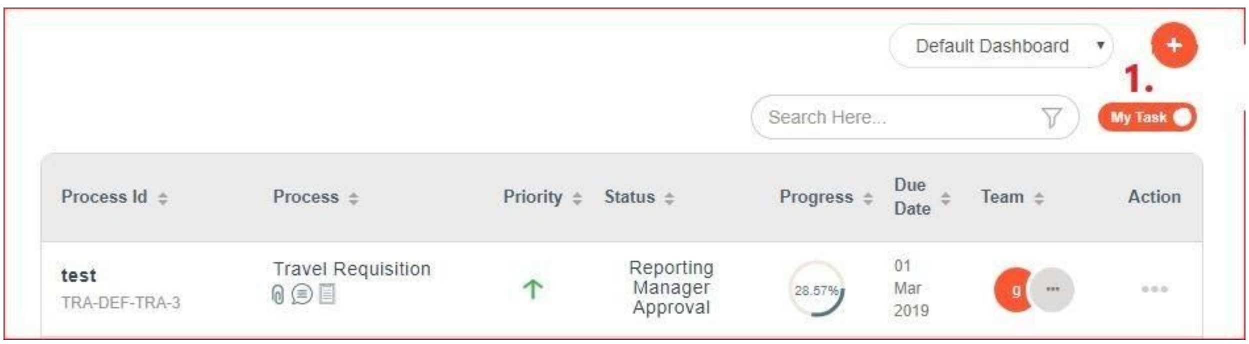





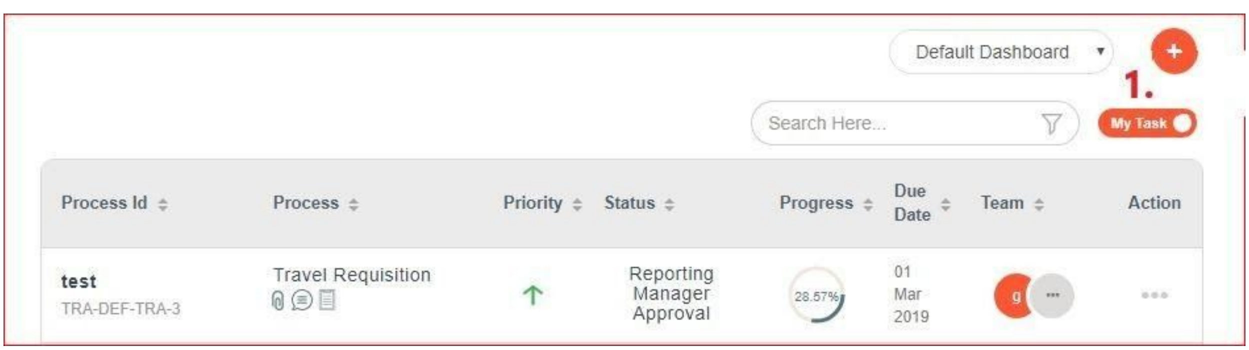

## 12. Where can I see all my Pending tasks?

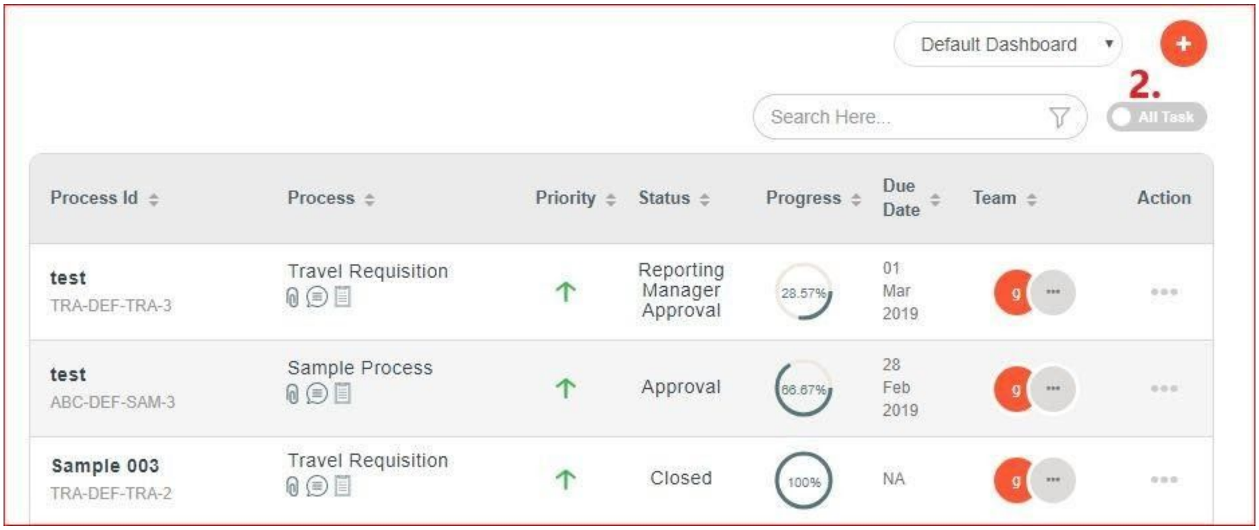
1. All the pending tasks would be available in My Task on the dashboard.




## 13. Where can I see all tasks that I have created?

1. All the created tasks will be visible by clicking on My Task toggle button
2. All tasks would be visible along with Task details






## 14. How do I see all tasks that I am a part of?

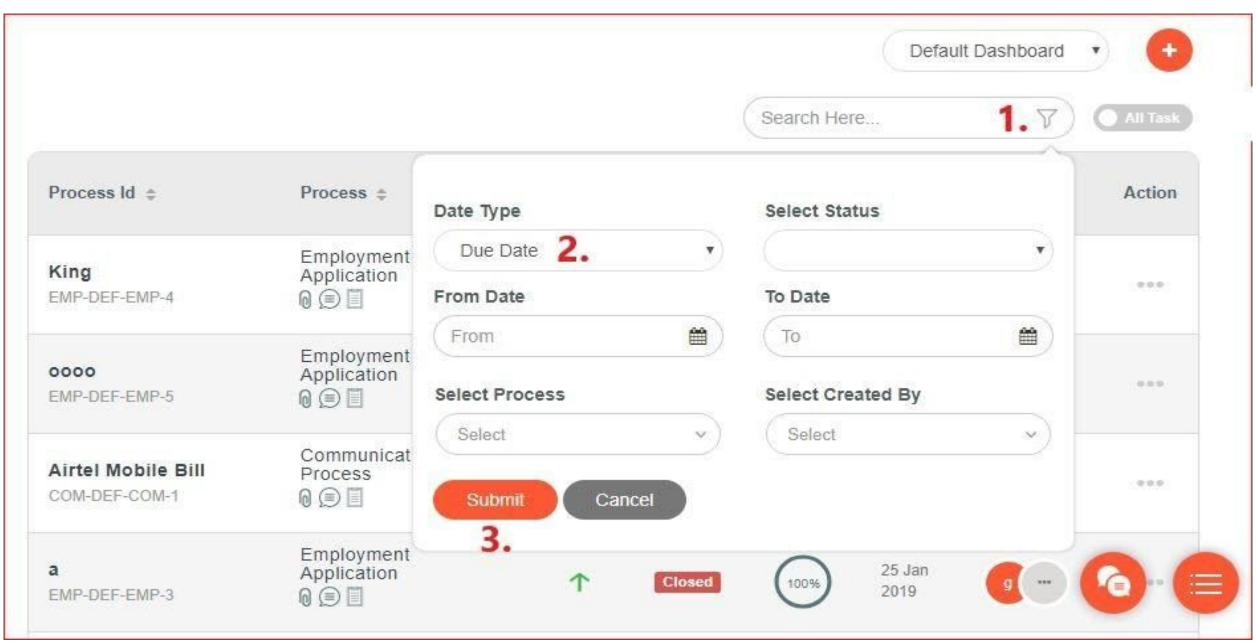
- All the tasks of which the user is part of will be seen on the dashboard where the users can select My Tasks(Tasks which are pending on the user) or All tasks(All the tasks of which the user is part of).

## 15. How do I filter Task lists based on date it was last actioned?

- Currently it is not possible in the system.

## 16. How do I filter Tasks based on their due date?

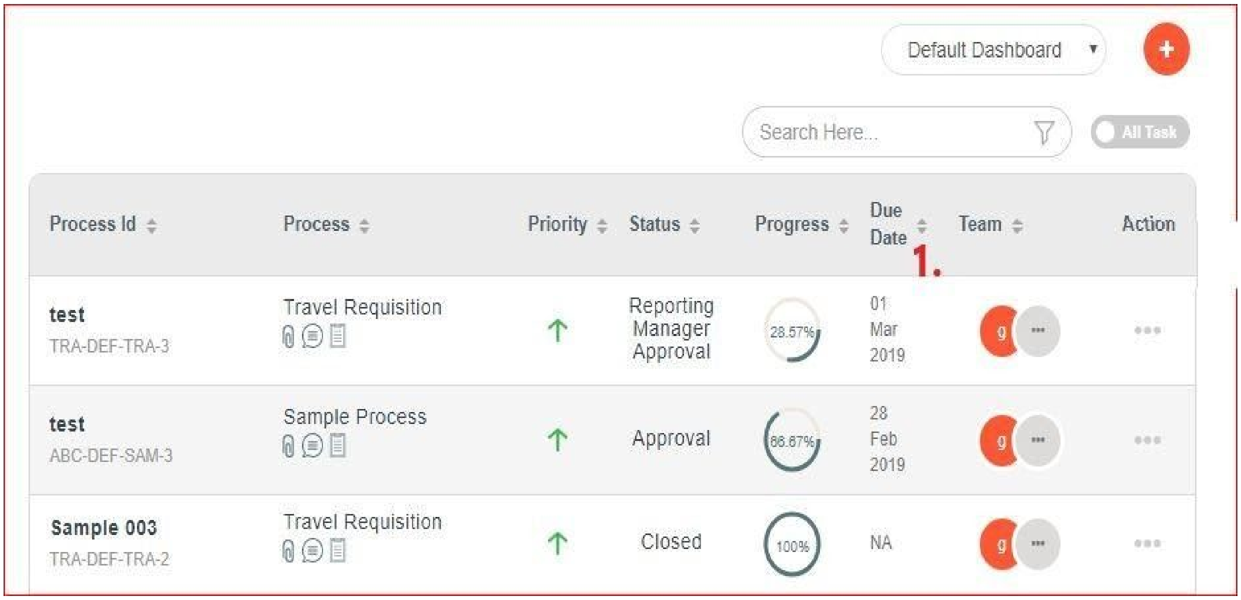
1. Click on the filter option on the dashboard where the tasks are listed
2. In Date type section, select Due date option
3. Click on Submit



## 17. How do I see Tasks due today?

- Users can see the tasks due today by:

1. clicking on the arrow beside Due Date on the dashboard. It would sort the data accordingly.

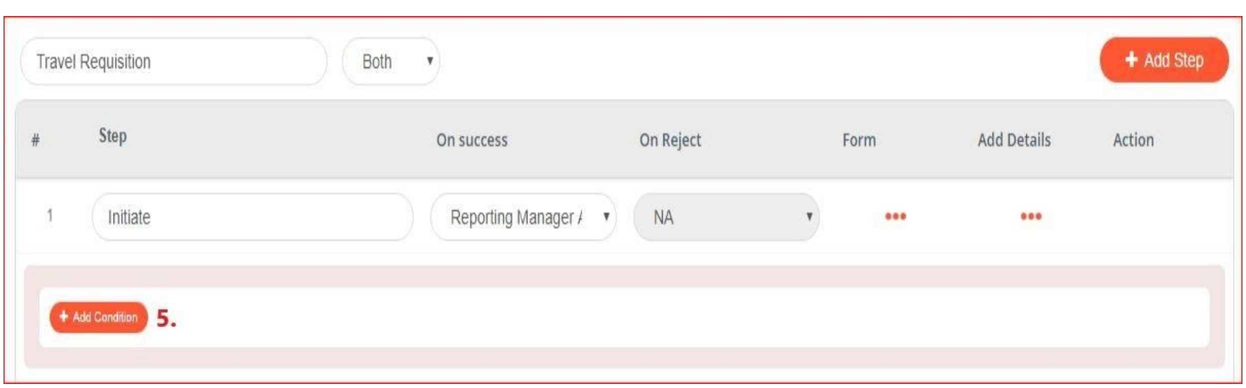


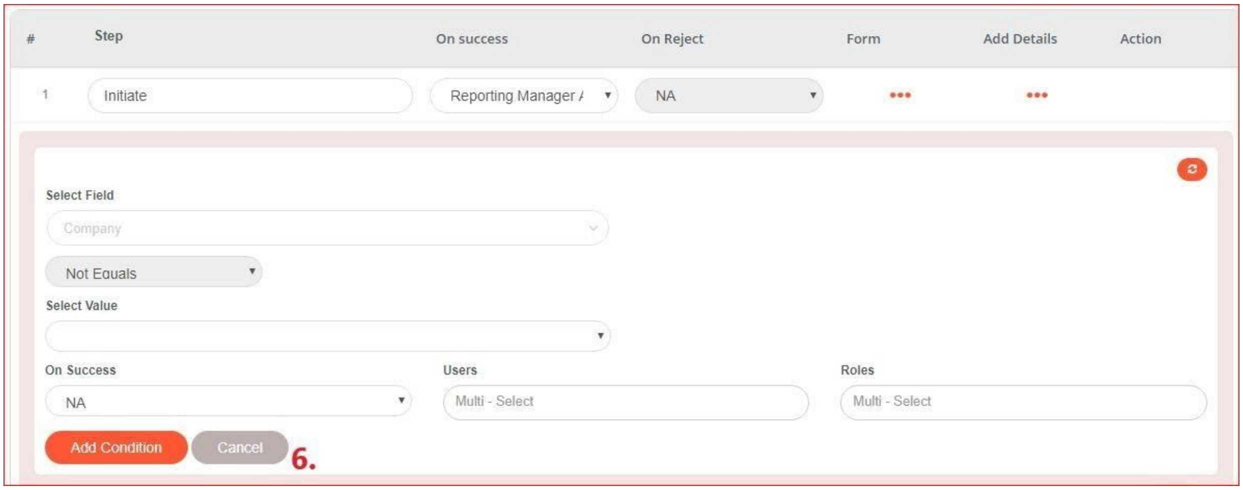

# Workflows & Forms

## 18. What is Conditional Routing & how do I configure it?

- Users can configure conditional routing in order to route forms based on values entered in form fields
- To configure Conditional Routing, follow steps as below:

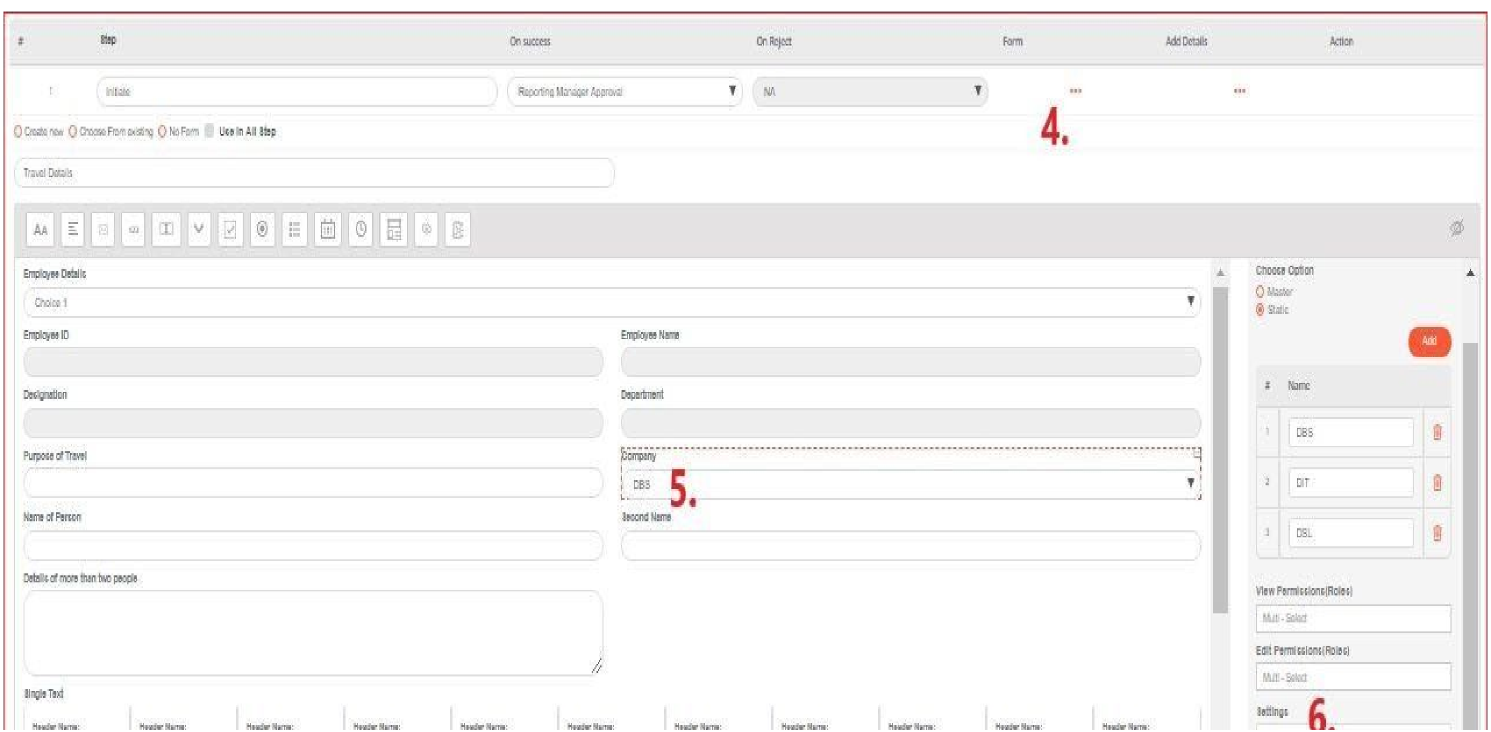
1. Go to My Apps on the Home screen
2. Click on the settings button
3. Click on the process name on which conditional routing needs to be set
4. Click on Add Details on the form on which conditional routing needs to be set. (for screenshots, refer Q.5 - 2nd approach)
5. Click on Add Condition
6. Create the condition and click on Add condition






## 19. How do I add validations to a form field?

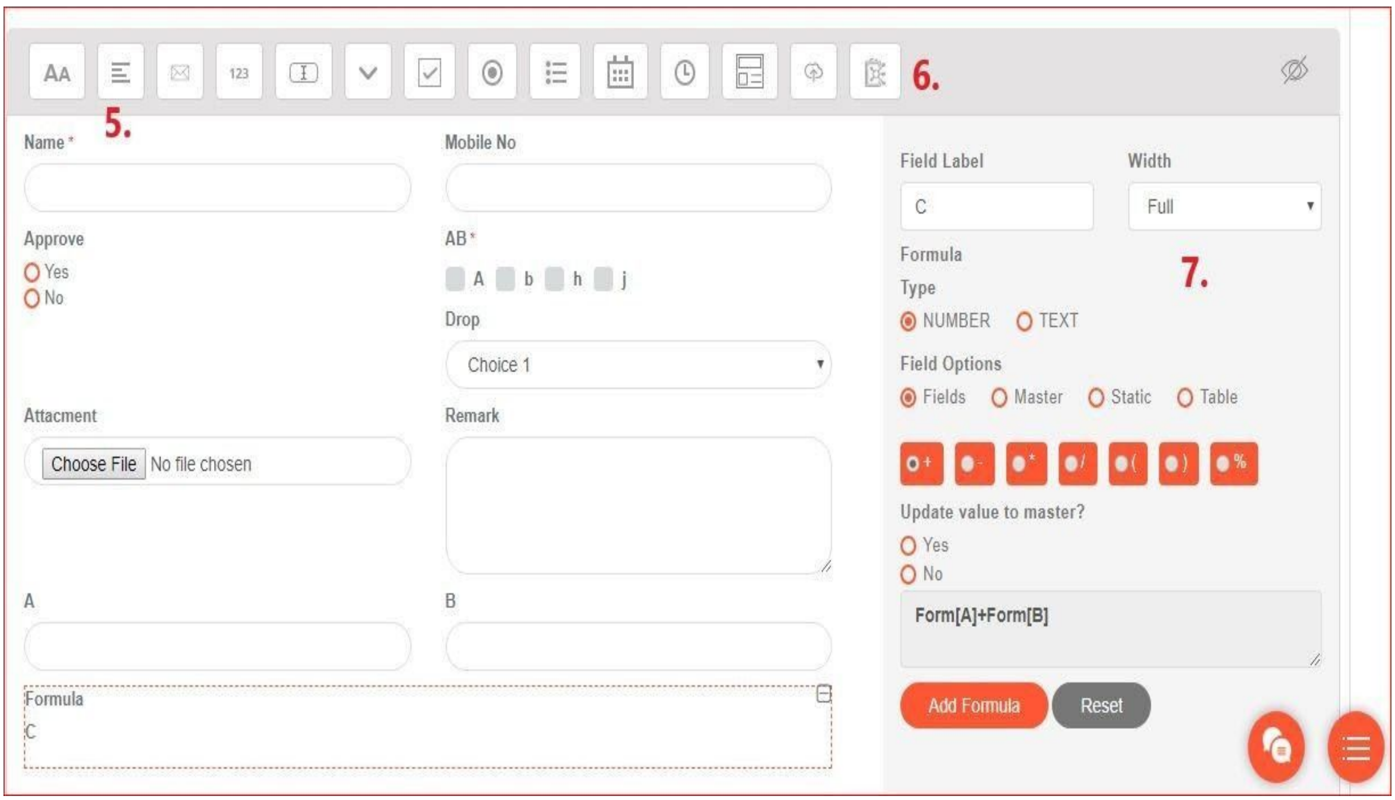
1. Go to My Apps on the Home screen
2. Click on the settings button
3. Click on the process name in which the form is configured where validation needs to be set
4. Click on Form
5. Select the field on which validation needs to be set. A configuration box will open up on the right side
6. Click on Settings.
7. In drop-down, Click on Required Tick Box



## 20. Can I perform calculations on the Forms I create?

- Yes, calculations can be performed on form fields.
- Follow steps as below:

1. Go to My Apps on the Home screen
2. Click on the settings button
3. Click on the process name in which the rights needs to be configured where validation needs to be set
4. Click on Form
5. Enter either text or numeric fields
6. Click on formula field
7. Configure the field with value accordingly




## 21. Can I assign a form to be filled out per each step?

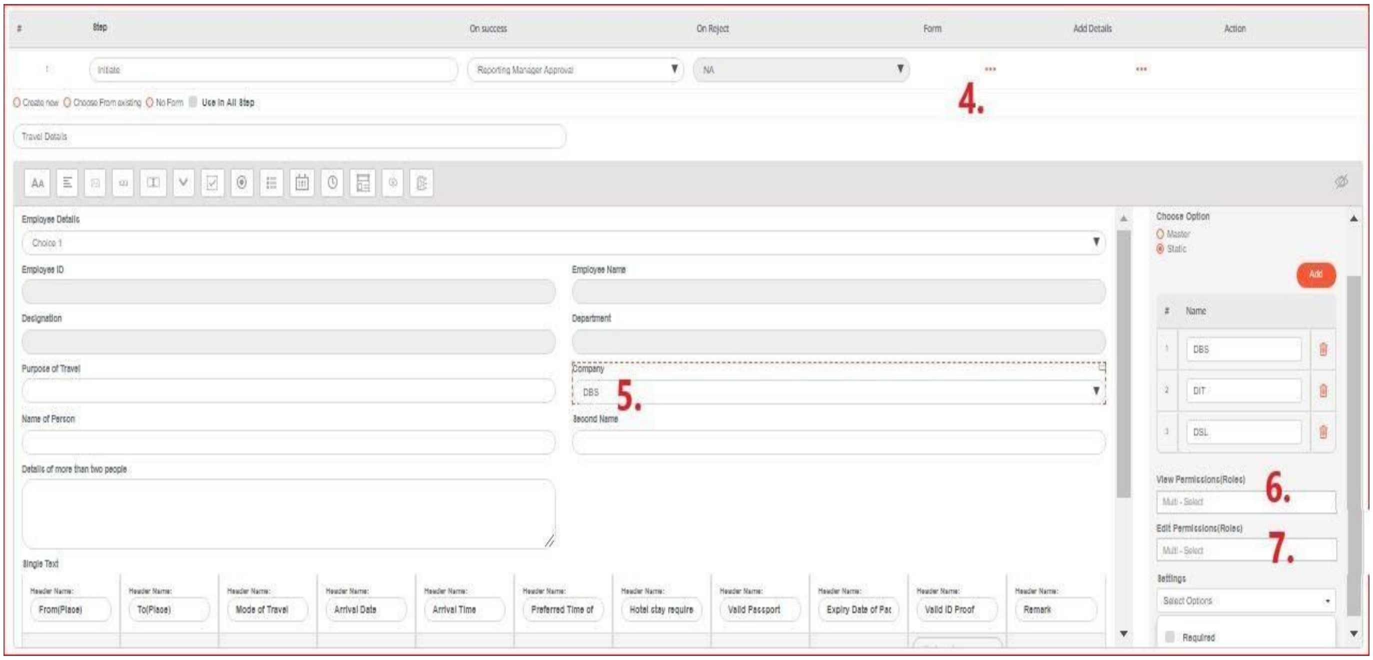
- Yes, Forms can be assigned to each step in a process except the Close/Last step

## 22. Can I restrict edit or view rights on a per-field level in a form?

- Yes, edit and view rights can be set on a per-field level. This can be set by following below mentioned steps:

1. Go to My Apps on the Home screen
2. Click on the settings button

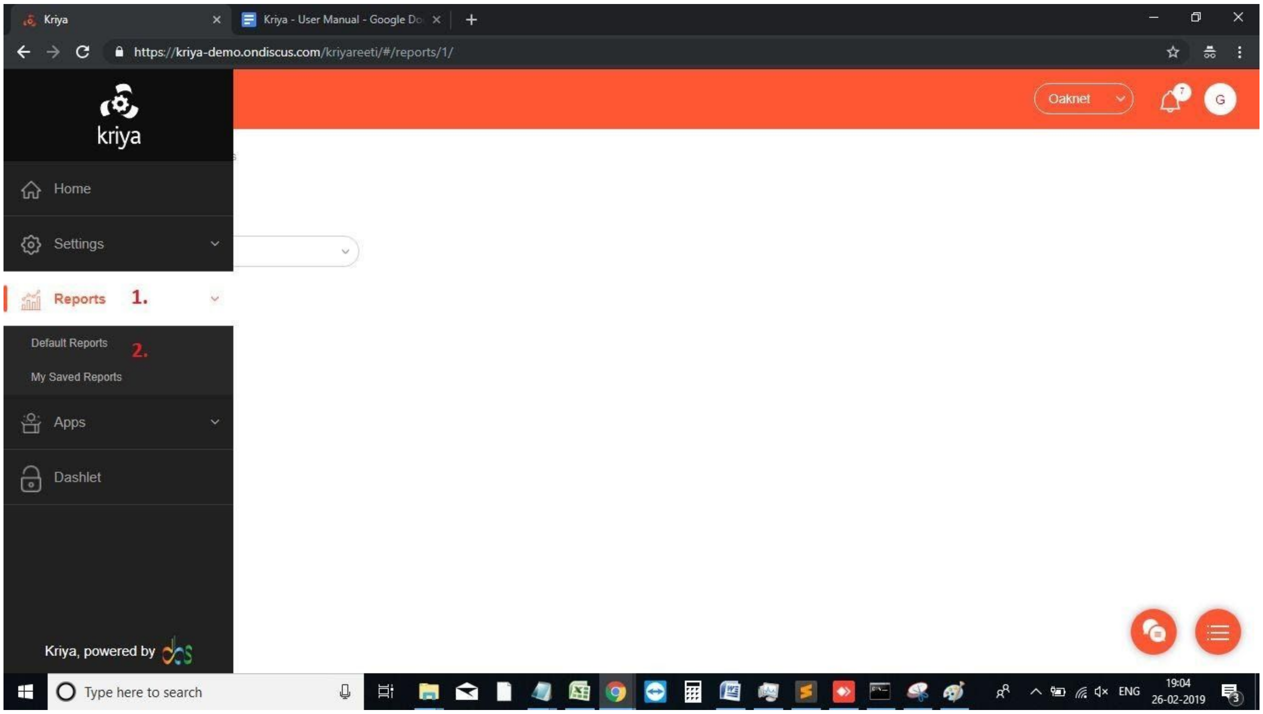
3. Click on the process name in which the rights needs to be configured where validation needs to be set
4. Click on Form
5. Select the field on which rights needs to be set. A configuration box will open up on the right side
6. Map roles for view permissions
7. Map roles for edit permissions

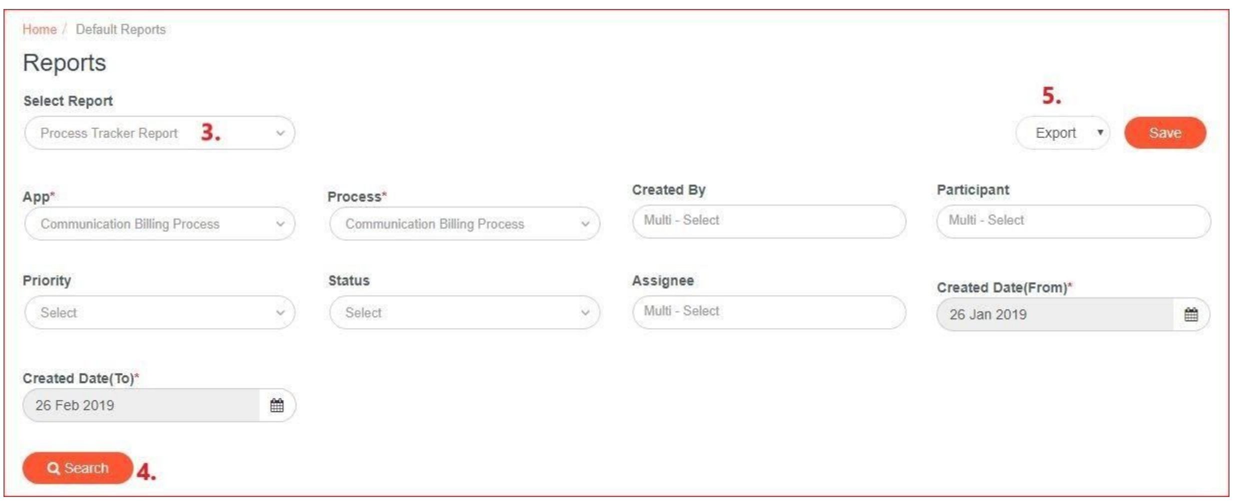



# Reports

## 6. How do I generate a report?

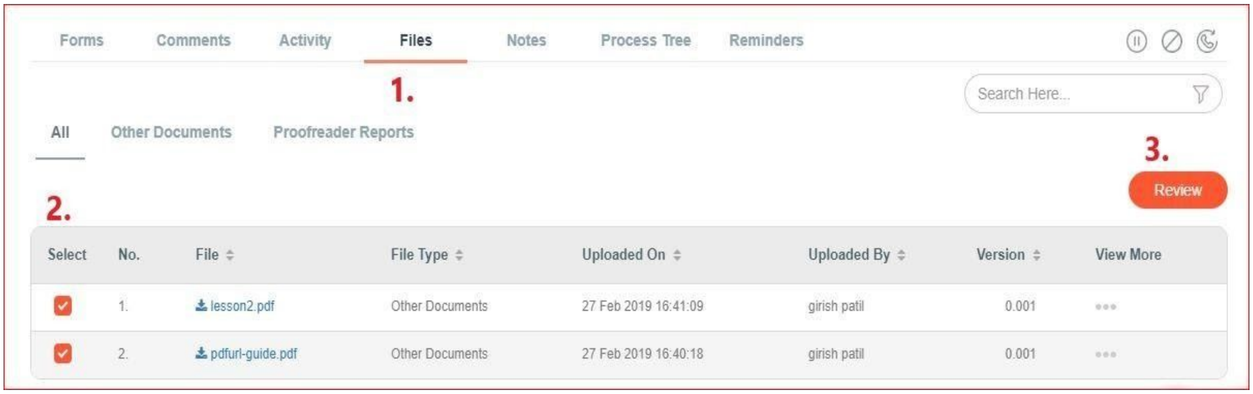
1. Click on Reports on Left Panel
2. Select Default reports
3. From report Drop-Down, select the report that needs to be generated.
4. Enter required details and click on Search
5. Click on Export and select required file(excel/csv)




# Artwork

7. What is a Proof Reader? Why do I see it as part of my Files view?
    - Proof Reader is a tool to compare 2 or more files and see if there are changes in them. Also user are able to write comments and perform other actions.
    - It is available under Files View so that users have accessibility to all the files they need to proofread and also generate report for the same.
        1. After filling the form, click on Files
        2. Select the files that needs to be proofread
        3. Click on Review


Forms
Comments
Activity
Files
Notes
Process Tree
Reminders
1.
Search Here...
All
Other Documents
Proofreader Reports
3.
Review
2.
Select
No.
File
File Type
Uploaded On
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Version
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