



Kriya - User Manual

Prepared By : Discus Business Solution

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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.

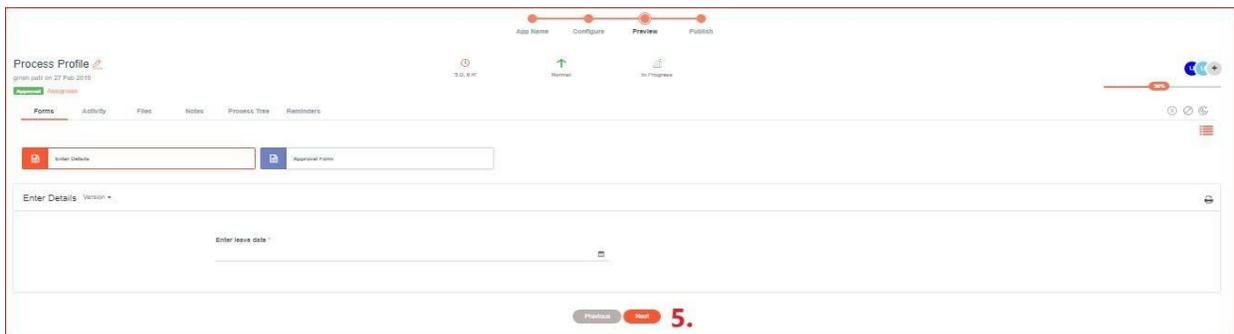
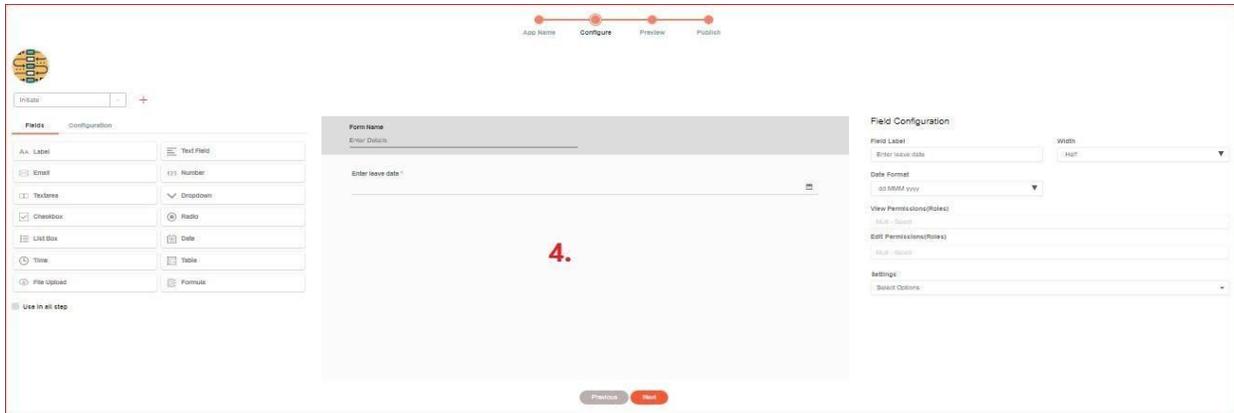
2. What is a Process? How does it relate to an Application?

- 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.







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App Name Configure Preview Publish

Publishing this app makes your changes live for all users.

Save As Draft Publish Process 6.

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



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- ❖ 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

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 field

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

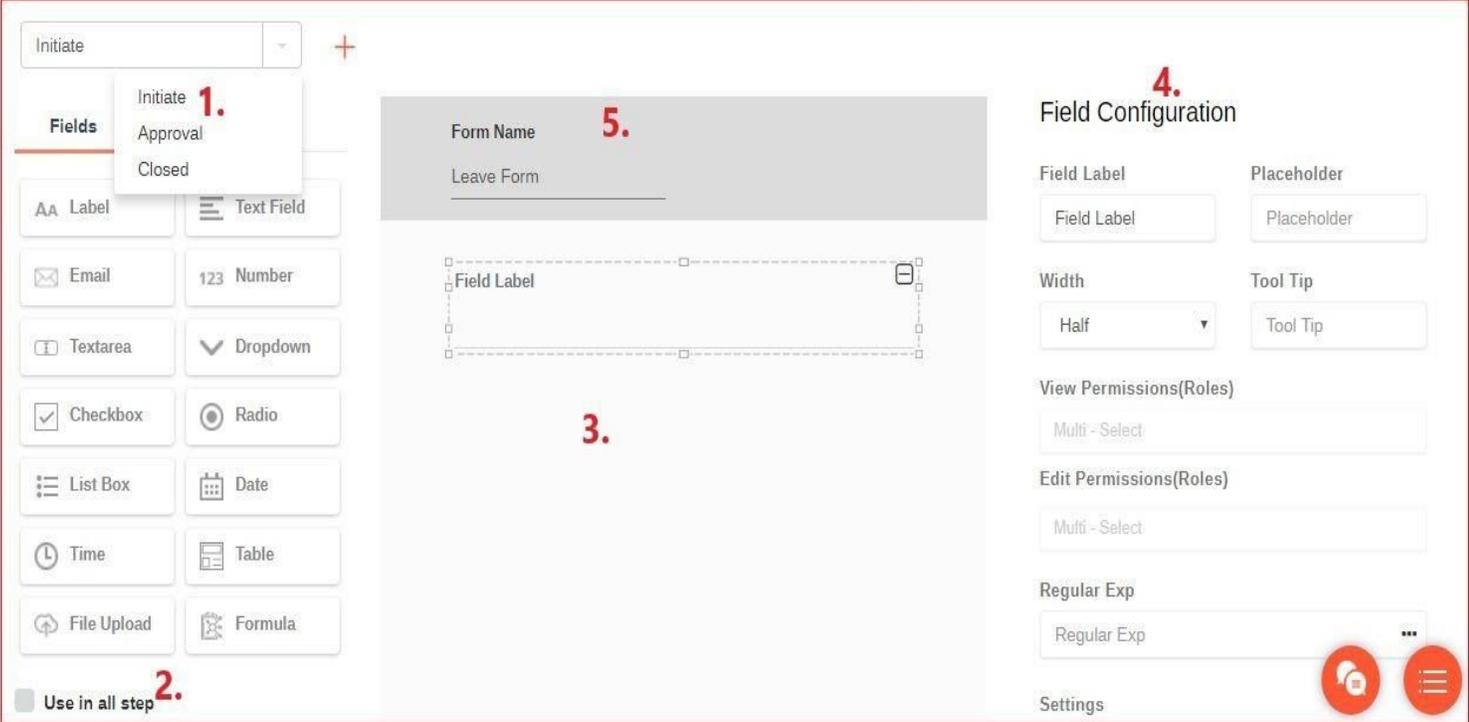
Width - 2 options - Full would cover whole form. Half would cover half form horizontally

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.



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- 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

No.	Role Name	Created By	Status	Created On	Action
1.	ABCD_DEFAULT	girish patil	Active	14 Feb 2019	...

No.	Name	Emp Id
1.	girish patil	ritesh.nemade+girish@discus.solutions



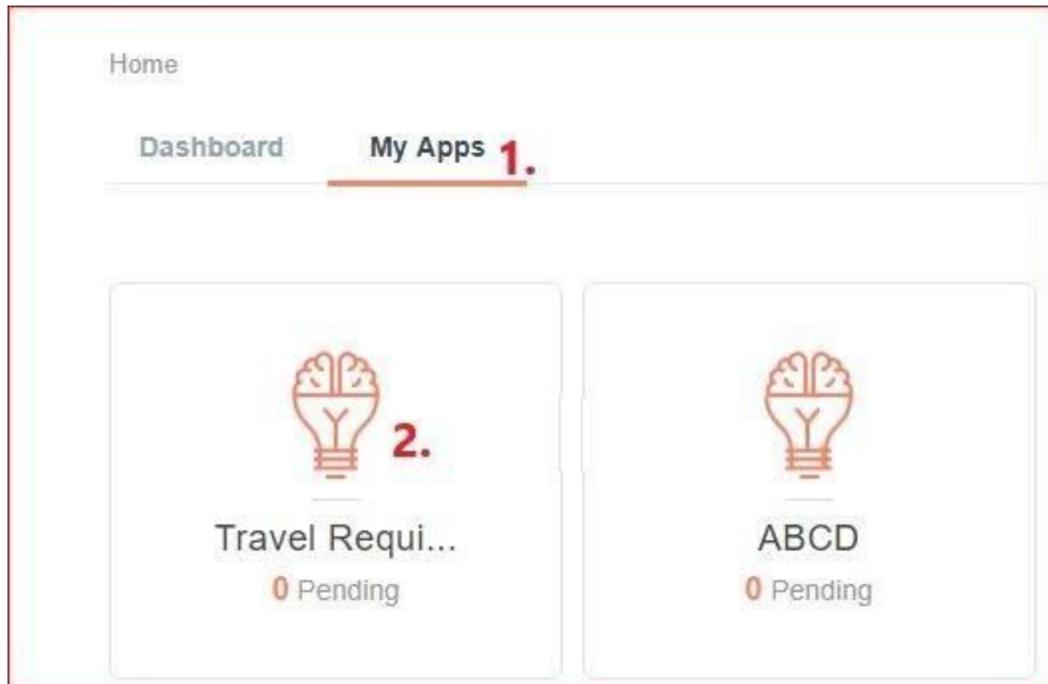
9. What is the relation between Permissions, Roles & Apps / Processes?

- 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



Home / Travel Requisition process

Process Pipeview

3.

Search + Add Task

Title	Process Name	Priority	Status	Progress	Due Date	Team	Action
No Data Found.							

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

Initiate Process

Title* Select Process* 4.

Priority

Select Due Date Policy:

Set Stepwise Timeline:

Step	Due Days
Approval of Bills	1 5.
Pre-SAP Entry	1

Process form

Billing Details

Provider	Department / Services	From Date	To Date

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



No.	Processes	Form Attached	Status	Mode	Type	Created By	Created On	Action
1.	3. Communication Billing ...	Billing Details...	Active	Draft	Both	girish patil	22 Jan 2019	...

#	Step	On success	On Reject	Form	Add Details	Action
1	Billing Details	Approval of Bills	NA	...	...
2	Approval of Bills	Pre-SAP Entry	Billing Details	...	4. ...	🗑️

Users

Roles

Same As Initiator

Dynamic

On Success Text

On Reject Text

Duration (In Days) **5.**

After Due Date

#	Step	On success	On Reject	Form	Add Details	Action
1	Billing Details	Approval of Bills	NA	...	...
2	Approval of Bills	Pre-SAP Entry	Billing Details	...	4. ...	

Users

Roles [+ New Role](#)

On Success Text

On Reject Text

Duration (In Days) **5.**

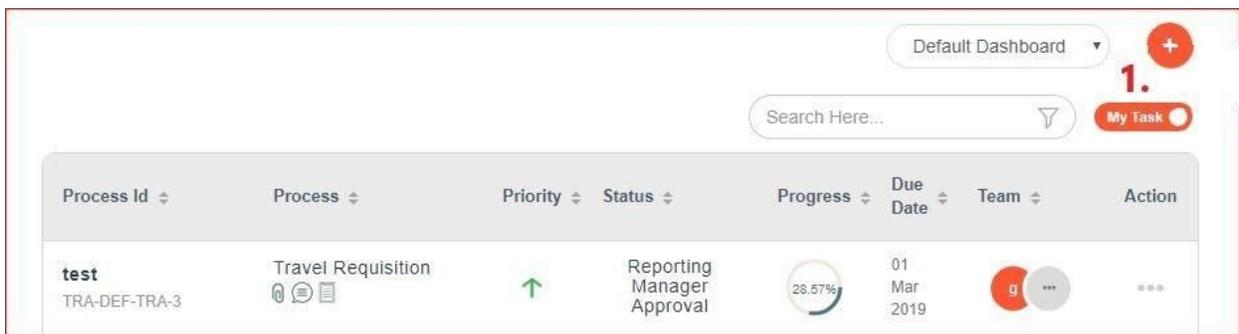
After Due Date

Same As Initiator

Dynamic

12. Where can I see all my Pending tasks?

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



Default Dashboard +

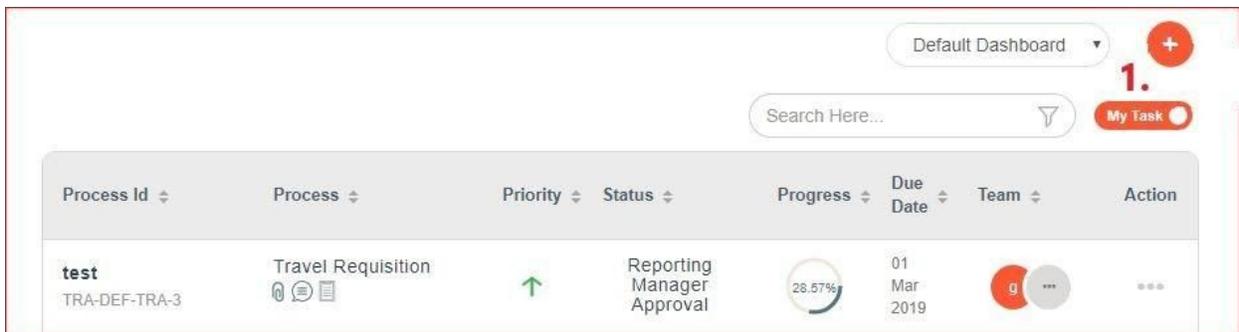
Search Here... 1.

My Task

Process Id	Process	Priority	Status	Progress	Due Date	Team	Action
test TRA-DEF-TRA-3	Travel Requisition 	↑	Reporting Manager Approval	28.57%	01 Mar 2019		...

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

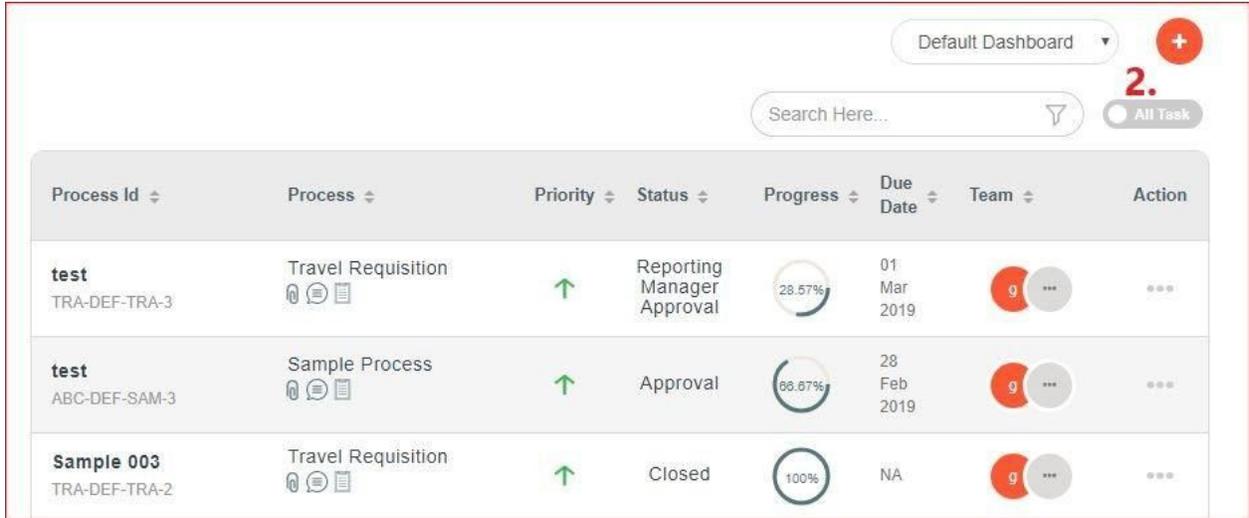


Default Dashboard +

Search Here... 1.

My Task

Process Id	Process	Priority	Status	Progress	Due Date	Team	Action
test TRA-DEF-TRA-3	Travel Requisition 	↑	Reporting Manager Approval	28.57%	01 Mar 2019		...



Process Id	Process	Priority	Status	Progress	Due Date	Team	Action
test TRA-DEF-TRA-3	Travel Requisition	↑	Reporting Manager Approval	28.57%	01 Mar 2019	g ...	...
test ABC-DEF-SAM-3	Sample Process	↑	Approval	66.67%	28 Feb 2019	g ...	...
Sample 003 TRA-DEF-TRA-2	Travel Requisition	↑	Closed	100%	NA	g ...	...

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

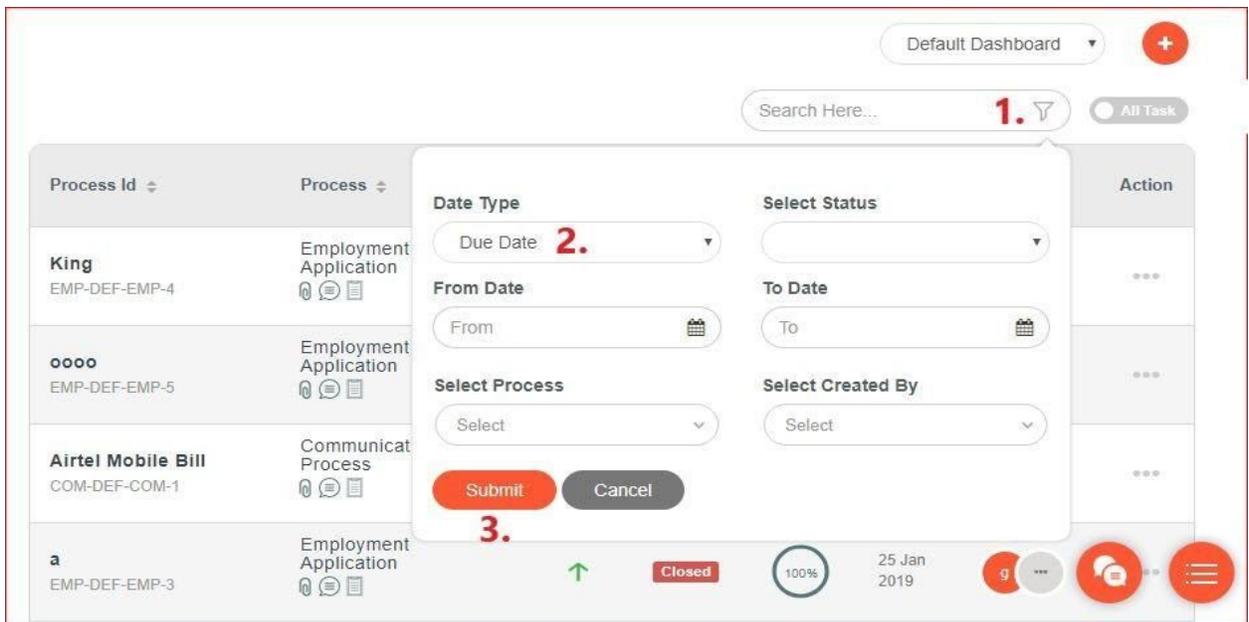
- All the tasks of which the user is part of will be seen on the dashboard where the users can select My Tasks(Tasks which are pending on the user) or All tasks(All the tasks of which the user is part of).

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

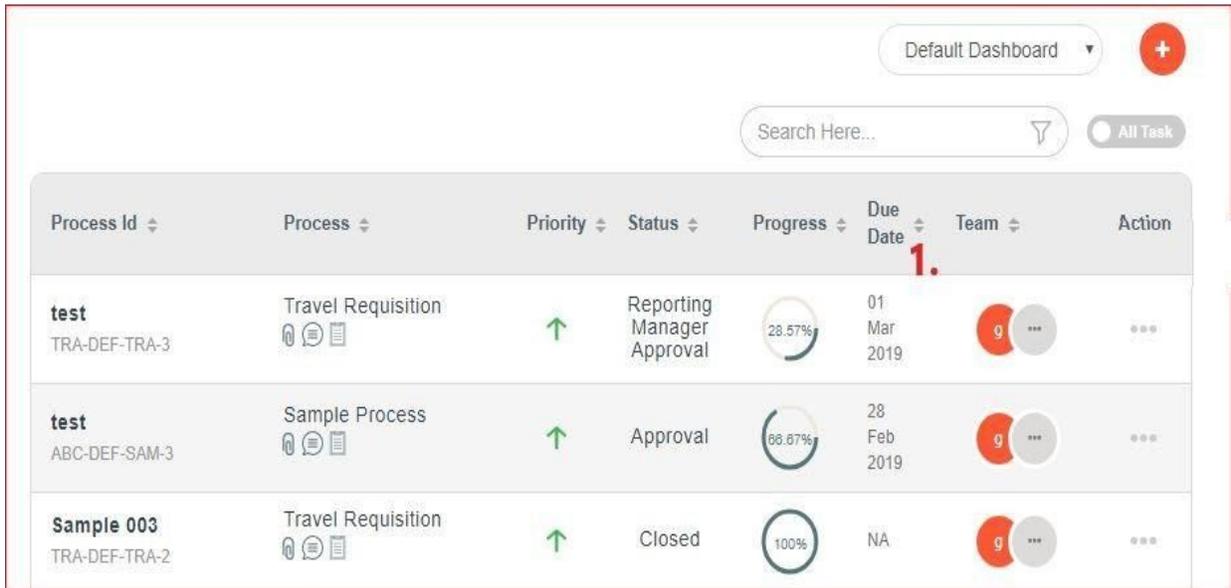


The screenshot shows the task dashboard with a filter modal open. The modal contains the following sections:

- Date Type:** A dropdown menu with 'Due Date' selected, marked with a red '2.'.
- Select Status:** A dropdown menu.
- From Date:** A date input field with a calendar icon.
- To Date:** A date input field with a calendar icon.
- Select Process:** A dropdown menu.
- Select Created By:** A dropdown menu.
- Buttons:** 'Submit' (highlighted with a red '3.') and 'Cancel'.

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.

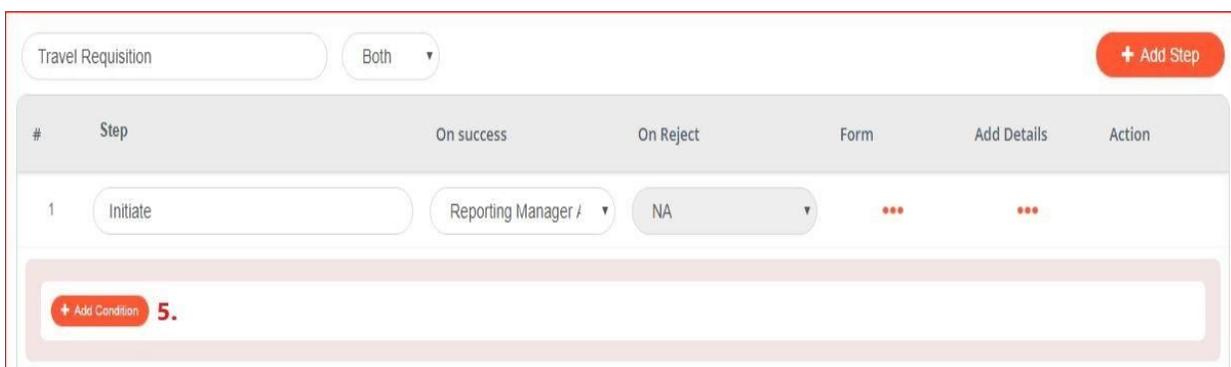


Process Id	Process	Priority	Status	Progress	Due Date	Team	Action
test TRA-DEF-TRA-3	Travel Requisition	↑	Reporting Manager Approval	28.57%	01 Mar 2019	g ...	...
test ABC-DEF-SAM-3	Sample Process	↑	Approval	68.67%	28 Feb 2019	g ...	...
Sample 003 TRA-DEF-TRA-2	Travel Requisition	↑	Closed	100%	NA	g ...	...

Workflows & Forms

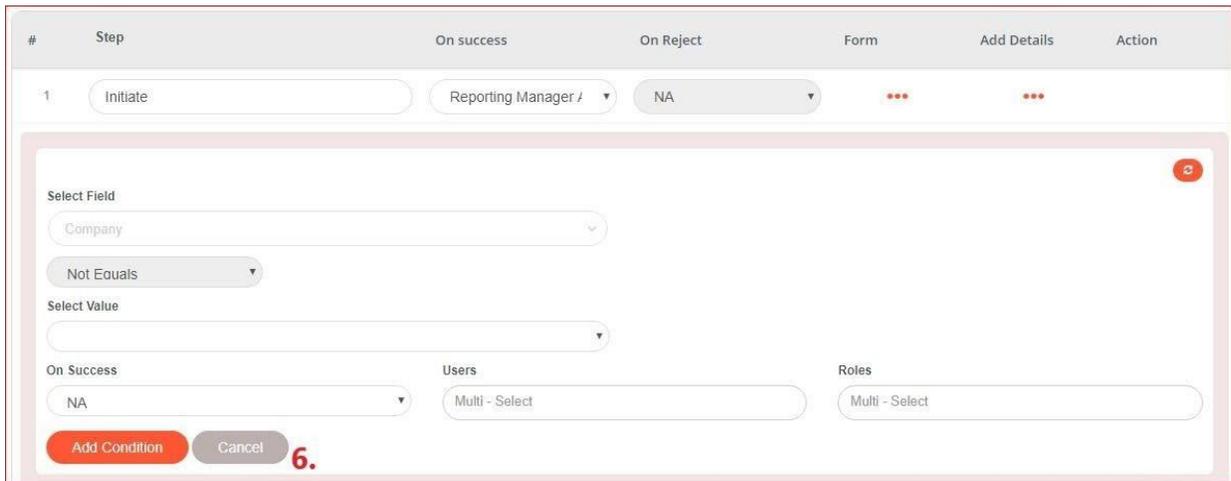
18. What is Conditional Routing & how do I configure it?

- 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



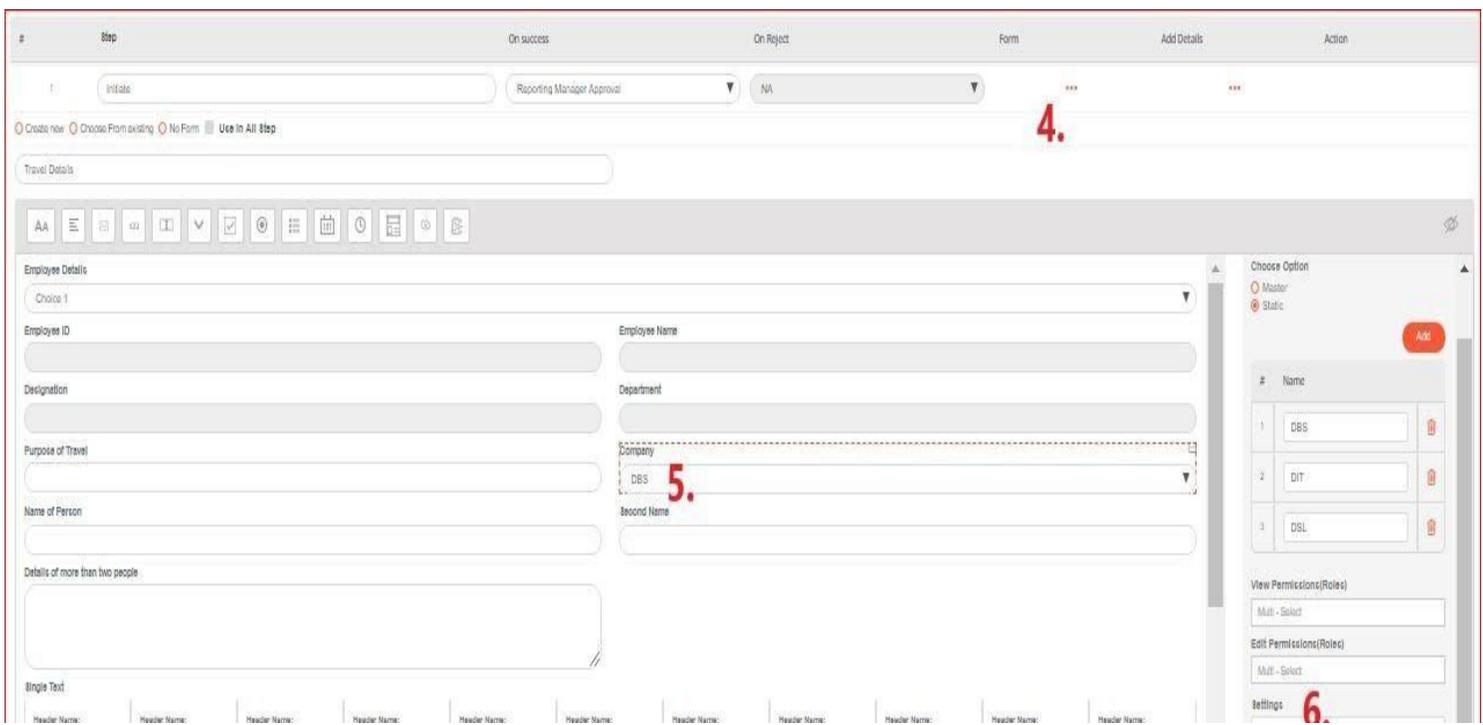
#	Step	On success	On Reject	Form	Add Details	Action
1	Initiate	Reporting Manager /	NA	...	...

+ Add Condition 5.



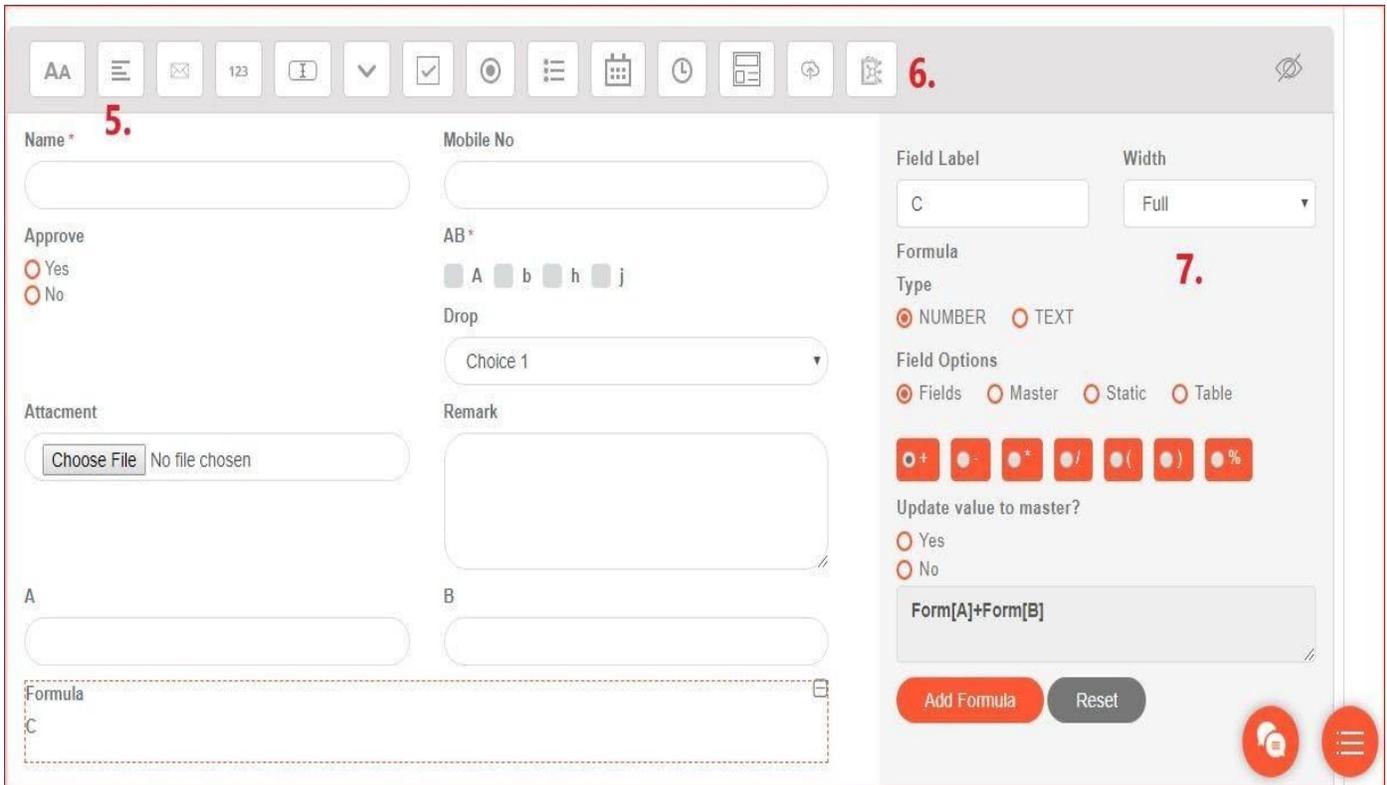
19. How do I add validations to a form field?

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



The screenshot displays the form configuration interface. A toolbar at the top contains various icons, with a red '6.' highlighting the formula field icon. The main form area includes fields for 'Name *' (with a red '5.'), 'Mobile No', 'Approve' (Yes/No radio buttons), 'Attachment' (Choose File), 'AB *' (checkboxes for A, b, h, j), 'Drop' (Choice 1), and 'Remark'. A 'Formula' field at the bottom contains the text 'C'. On the right, a configuration panel shows 'Field Label' as 'C', 'Width' as 'Full', 'Formula Type' as 'NUMBER' (with a red '7.'), and 'Field Options' as 'Fields'. Below this, there are mathematical operators (+, -, *, /, %, etc.) and an 'Update value to master?' section with 'Yes' and 'No' radio buttons. The formula field contains the expression 'Form[A]+Form[B]'. At the bottom of the panel are 'Add Formula' and 'Reset' buttons.

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



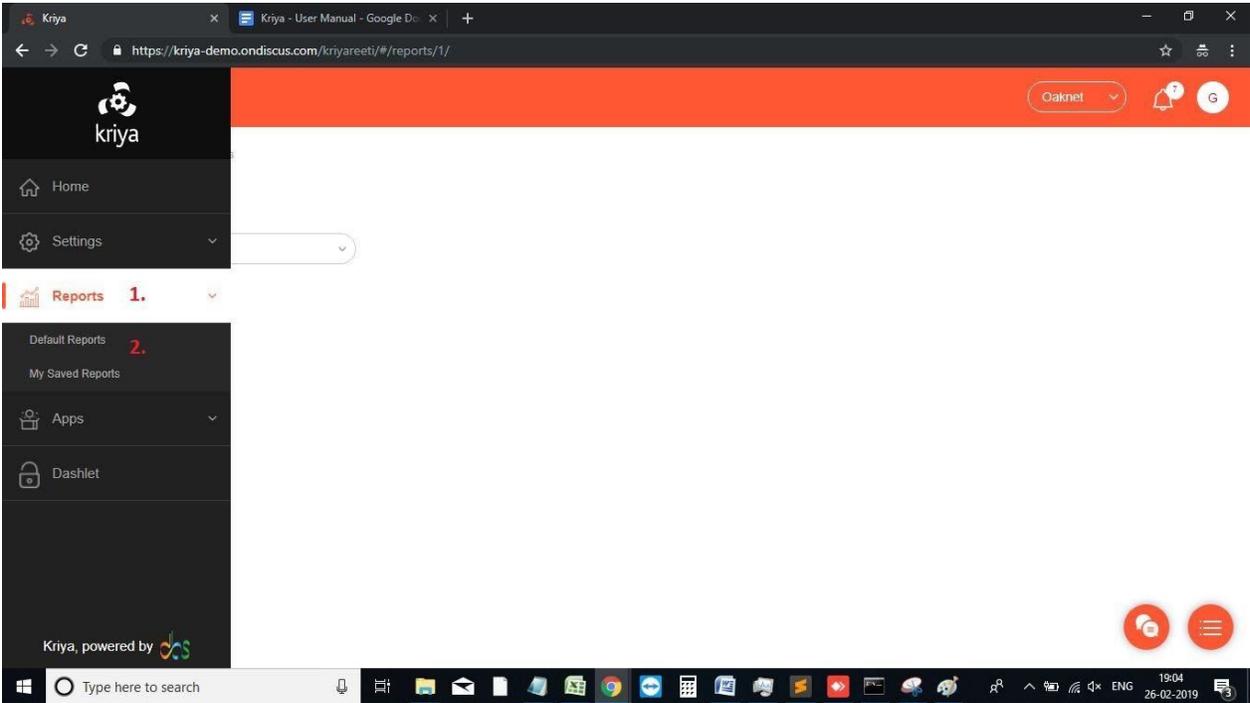
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3. Click on the process name in which the rights needs to be configured where validation needs to be set
4. Click on Form
5. Select the field on which rights needs to be set. A configuration box will open up on the right side
6. Map roles for view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



Home / Default Reports

Reports

Select Report 5.

Process Tracker Report Export Save

App* Process* Created By Participant

Communication Billing Process Communication Billing Process Multi - Select Multi - Select

Priority Status Assignee Created Date(From)*

Select Select Multi - Select 26 Jan 2019

Created Date(To)*

26 Feb 2019

Search 4.

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

2.

3. [Review](#)

Select	No.	File	File Type	Uploaded On	Uploaded By	Version	View More
<input checked="" type="checkbox"/>	1.	 lesson2.pdf	Other Documents	27 Feb 2019 16:41:09	girish patil	0.001	...
<input checked="" type="checkbox"/>	2.	 pdfuri-guide.pdf	Other Documents	27 Feb 2019 16:40:18	girish patil	0.001	...