

# Creating Aleph Workflow Scripts with e-Glue



NAAUG - 2003

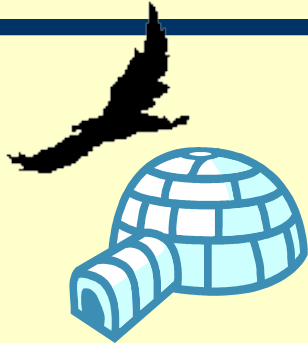
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# What is e-Glue?

## ◆ **An authoring tool**

### ■ **Workflow: step-by-step help**

- Offers the ability to create training sessions that users can use at their own pace and at their own workstation

### ■ **Helper: context-sensitive help**

- Allows locally customizable, context-sensitive linkage between screen elements and help topics

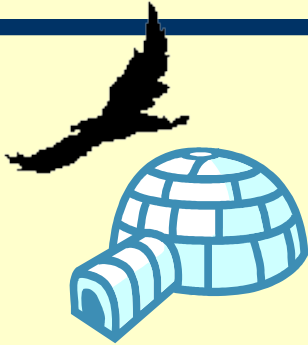
## ◆ **A viewer**

- Allows staff to individually select which workflows they want assistance with
- Supports scripted training sessions without instructor intervention (self training)



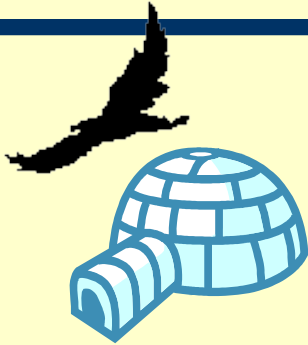
# Creating Processes

- ◆ Project staff develop scripts using general Iowa workflows/terminology
- ◆ Technical Coordinator copies and edits scripts to follow generic Aleph workflows/terminology
- ◆ Process is captured and saved in Iowa Project and in Aleph500 Project.



# Project Background

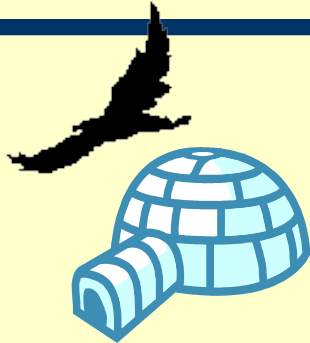
- ◆ Iowa began creating e-Glue scripts fall 2002
  - Acquisitions (fall 2002)
  - Cataloging (winter 2002)
  - Serials (spring 2003)
  - Circulation (summer/fall 2003)



# Processes Completed

## ◆ *Acquisitions / Administrative*

- Creating a Vendor Record – Control Data
- Creating a Vendor Address Record
- Creating a Budget (Fund) Record
- Creating an Order Record (Purchase Order)
- Acquisitions Based Receiving (Arrival) – Order Type M, O
- Creating a General Invoice/Registering a Payment
- Claiming a Monograph (Initial Claim/Subsequent Claims)
- Creating a Subscription Record in Acquisitions



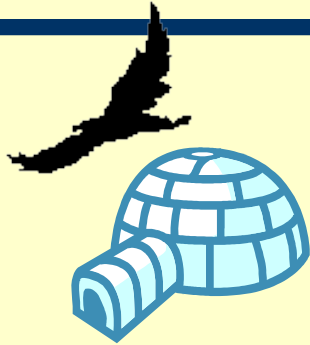
# Processes Completed

## ◆ *Cataloging*

- Fixed Field Editing & Help on field
- Creating a Basic HOlDings Record
- Creating an ITM Link
- Creating and Saving a Template

## ◆ *Serials (in process)*

- Creating a Subscription Record in Serials
- Creating a Subscription Record in Acquisitions
- Creating Publication Schedules
- Arrival in Serials Client
- Claiming in the Serials Client



# Processes Completed

- ◆ Cross-Module
  - How to search for a record using SCAN
  - How to search for a record using FIND
  - Creating an Item Record



# e-Glue Terminology

- ◆ **Project:** a collection of workflow processes.
- ◆ **Process:** series of consecutive online steps and actions required to bring about a desired result
- ◆ **Topic:** a description of each step or action
- ◆ **Element:** any component part of an online display





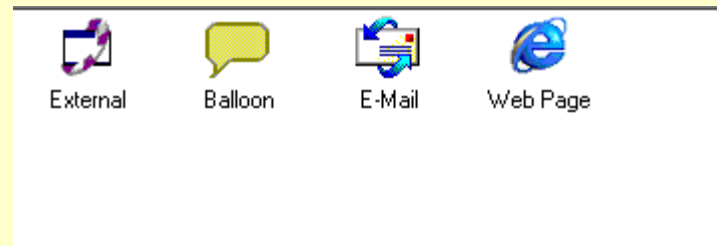
# Putting Them Together

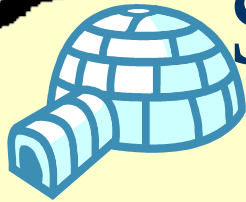
- ◆ **Topics + Elements = Process**
- ◆ **Process + Process = Project**



# What is a topic?

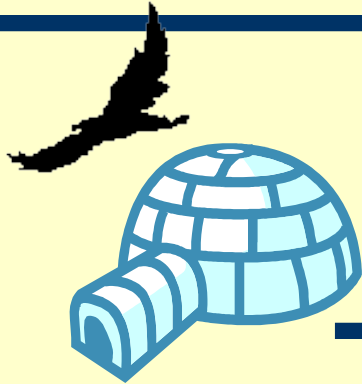
- ◆ **A single step or action required to complete a discrete task or workflow**
- ◆ **Types of topics**
  - **Help “balloons”**
  - **External files**
  - **Web pages**
  - **E-Mail**





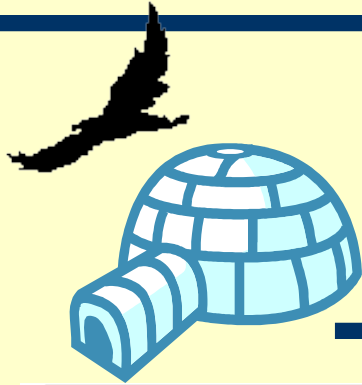
# Steps to Create a Process

- ◆ **Create topics in e-Glue**
- ◆ **Capture Elements in Aleph**
- ◆ **Link Topics to Captured Elements**

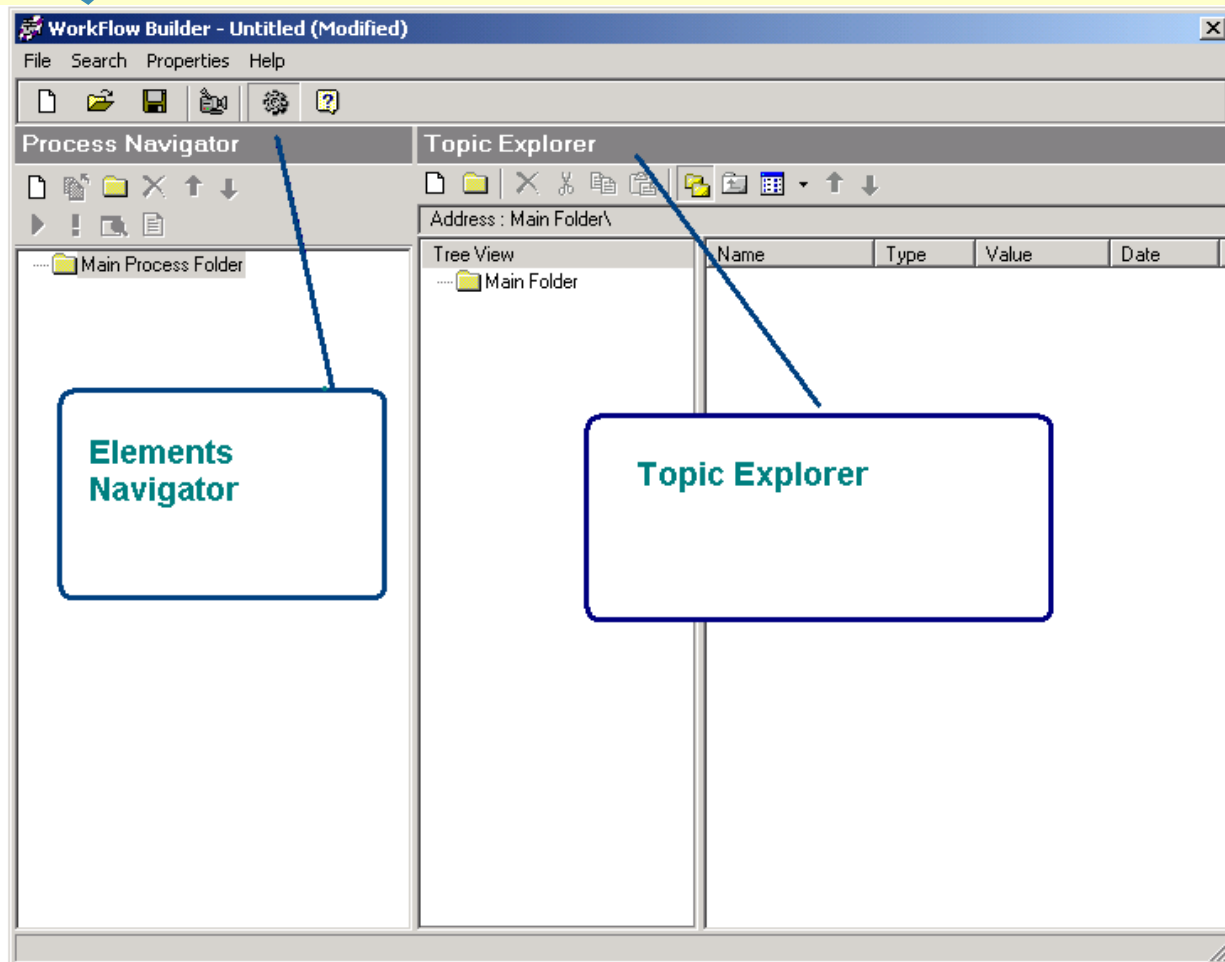


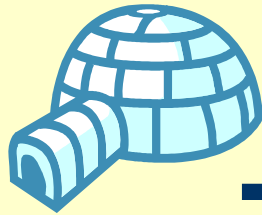
# e-Glue Builder

- ◆ Topic Explorer
- ◆ Context Navigator
- ◆ Process Navigator
- ◆ Control Panel
- ◆ Toolbars
- ◆ Change screens
- ◆ Notes



# Builder



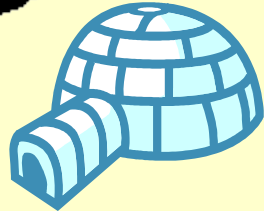


# Topic Explorer

The screenshot displays the 'Workflow Builder - ORDER LOG ENTRY' application window. The interface is divided into several sections:

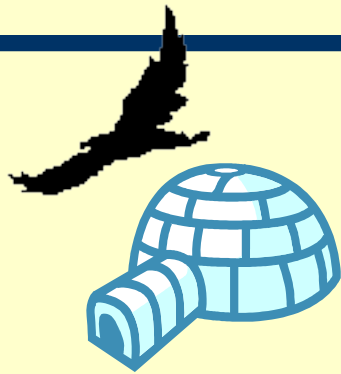
- Process Navigator:** Shows a tree view of the workflow process, including 'Main Process Folder', 'Acquisitions', 'Create a Vendor', 'Order log entry', and 'Circulation'.
- Topic Explorer:** Shows a tree view of the topic structure, including 'Main Folder', 'New Folder', 'Templates', 'Circulation', 'Acquisitions', 'Order log entry', and 'Create a Vendor'. The 'Order log entry' folder is expanded, showing a list of topics: 'Highlight order', 'ORDER LOG', 'Action Date', 'TRANSACTION TYPE', 'LOG TEXT', 'ADD', 'Explanation', 'Change Screen', and 'END OF PROCESS'.
- Topic Properties:** A form for editing the selected topic. The 'Topic Name' is 'Highlight order', the 'Date' is '\_9/\_9/02', and the 'Author' is 'robinson'. There is also a 'Remark' field.
- Topic Content:** A text area for entering the topic text. The text is 'Highlight the order where you want to enter data.' There is a 'Balloon Align' section with 'Down' selected and a scroll bar. There is also a 'Link Text' field and a 'Linked Topic' dropdown menu set to 'None'.

A blue box labeled 'Topic Tree' points to the 'Order log entry' folder in the Topic Explorer tree view. Another blue box labeled 'Topic Content' points to the text area in the Topic Properties section.



# Elements Navigator

- ◆ The Elements Navigator is used to display the captured elements.
- ◆ The Elements Navigator has two modes:
  - **Context Navigator** and
  - **Process Navigator**



# Context Navigator

**Workflow Builder - ORDER LOG ENTRY**

File Search Properties Help

**Context Navigator**

- GENERAL PROJECT
  - Acquisitions
    - Log of Order ###
      - &Add
        - ADD
      - LOG TEXT
        - LOG TEXT
      - TRANSACTION TYPE
        - TRANSACTION TYPE
      - Custom
        - Action Date
    - MDICLIENT
    - Administration
      - Vendor List
        - Vendor Information
        - &New
      - AFXCONTROLBAR42
      - Applications Toolbar

**Topic Explorer**

Address : Main Folder\Acquisitions\...

Tree View

- Main Folder
  - New Folder
  - Templates
  - Circulation
  - Acquisitions
    - Order log entry
      - Highlight order
      - ORDER LOG
      - Action Date
      - TRANSACTION T
      - LOG TEXT
      - ADD
      - Explanation
      - Change Screen
      - END OF PROCES
    - Create a Vendor

**Diagram:** A central diagram with two boxes labeled "Elements" and "Topics". Lines connect "Elements" to the "ADD" and "TRANSACTION TYPE" items in the "Log of Order ###" folder. Lines connect "Topics" to the "LOG TEXT" and "TRANSACTION TYPE" items in the "Log of Order ###" folder, and to the "ORDER LOG" and "TRANSACTION T" items in the "Order log entry" folder.





# Process Navigator

Workflow Builder - ORDER LOG ENTRY

File Search Properties Help

Process Navigator

Topic Explorer

Address : Main Folder\Acquisitions\

Tree View

- Main Folder
  - New Folder
  - Templates
  - Circulation
  - Acquisitions
    - Order log entry
      - Highlight order
      - ORDER LOG
      - Action Date
      - TRANSACTION T
      - LOG TEXT
      - ADD
      - Explanation
      - Change Screen
      - END OF PROCES
    - Create a Vendor

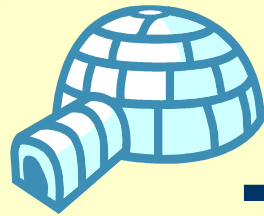
Main Process Folder

- Acquisitions
  - Create a Vendor
  - Order log entry
    - Change Screen
    - Explanation
    - Highlight order
    - Order &Log
    - Custom
    - Action Date
    - TRANSACTION TYPE
    - LOG TEXT
    - &Add
    - Change Screen
  - Circulation

Process Name

Steps in the process

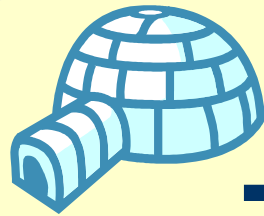
Topics



# Control Panel

The screenshot displays the Workflow Builder software interface. A 'Control Panel' window is overlaid on the main application window. The Control Panel contains three buttons: 'Play' (a right-pointing triangle), 'Pause' (two vertical bars), and 'Capture' (a globe icon). A tooltip for the 'Capture' button reads 'Point and Capture Capture hotspot'. A callout box labeled 'Open & Close the Control Panel' points to the 'Capture' button. Another callout box labeled 'Capture Mode' points to the 'Capture' button. The main application window, titled 'Workflow Builder - Untitled (Modified)', features a menu bar (File, Search, Properties, Help) and a toolbar. Below the toolbar are two panes: 'Context Navigator' on the left and 'Topic Explorer' on the right. The 'Context Navigator' shows a tree view with 'Project:' and a sub-item. The 'Topic Explorer' shows 'Address : Main Folder\' and a table with columns 'Name', 'Type', 'Value', and 'Da'. The table is currently empty.

Name	Type	Value	Da
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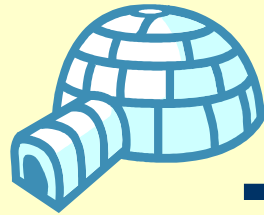
# Toolbars

The screenshot displays the 'Workflow Builder - ORDER LOG ENTRY' application window. It features a menu bar with 'File', 'Search', 'Properties', and 'Help'. Below the menu is a toolbar with icons for file operations. The interface is divided into several panes:

- Process navigator:** Contains a toolbar with icons for file management and a tree view showing a 'Main Process Folder'.
- Topic Explorer:** Contains a toolbar with icons for document management and a tree view showing a path: 'Main Folder\Acquisitions\Order log entry\'.
- Properties Panel:** Located on the right, it includes fields for 'Topic Name' (highlight order), 'Date' (\_9/\_9/02), 'Author' (robinson), and 'Remark'. It also has a 'Balloon Align' section with 'Down' selected and a 'Link Text' field.

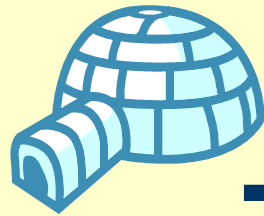
Four callout boxes with blue borders and white text identify specific toolbars:

- Project Toolbar:** Points to the top toolbar of the application window.
- Process or Context Navigator Toolbar:** Points to the toolbar in the Process navigator pane.
- Topic Explorer Toolbar:** Points to the toolbar in the Topic Explorer pane.
- Control Panel:** Points to a small floating window with play, pause, and refresh icons.



# Change Screen

- ◆ Change screen is a feature of the Process Navigator. It's purpose is to direct the user to the screen he must go to in order to proceed with the process.
- ◆ Change screen will appear whenever the user has a different screen open than the screen to which the next topic is directed.
- ◆ Change screen will not disappear until the user is at the correct screen



# Change Screen

- ◆ There must be a Change Screen balloon at the top of every process directing the user to correct screen. The Captured Process itself starts at the first step on the correct screen NOT at a description of how to get to the correct screen.

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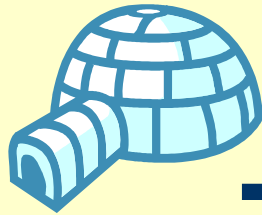


# Notes

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- ◆ Note is a feature of the Process Navigator.
- ◆ It is a balloon Topic that appears at the center of the screen but is not attached to a specific element.
- ◆ The Note's purpose is to provide a space for random help in the middle of a Process.

# Notes



- ◆ It will appear where ever it is placed in the Process, regardless of the users actions and will disappear when clicked on.
- ◆ The final step in every process is a NOTE that says “End of Process”