qalcwise

Business Applications Cloud

Qalcwise Designer
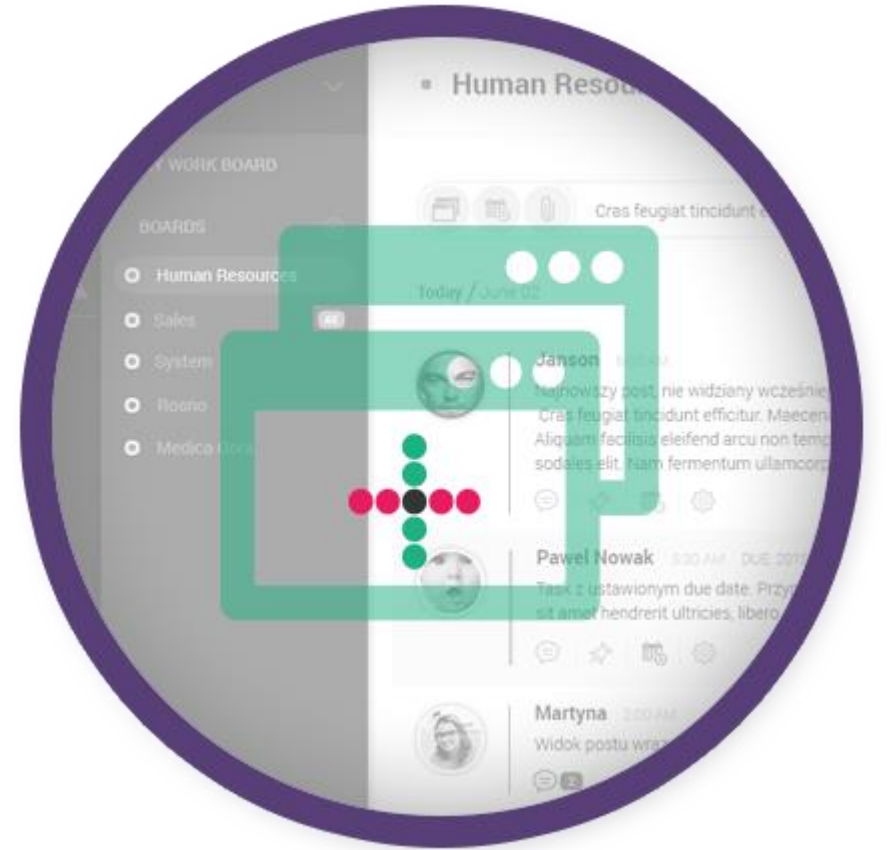
Application KPIs

Designing Business Apps

qalcwise
Business Applications Cloud

What's inside

This tutorial helps to understand how to design information that will make your applications more informative and help users make quicker business decisions. We will design the information displayed on application task (App Stripe).

What's required

This tutorial is continuation of „Introdution to Designer". As the exercise example we will continue the application built in that module, so it is strongly advised to finish the „Introduction to Designer" first.

How long it takes

It's a very short module and should take no longer than ½ hour ☺.

Notation used

There is no special notation used in this Tutorial. It's a free-form exercise. It might be useful to pay attention to Green rectangles and arrows as they point to things in subject.

What's not inside

Please check other tutorials about „Working with Data" and „Workflow".

HAVE FUN!

Qalcwise

is

Business Applications Cloud

Platform

A place in Cloud where you can **collaborate** and **communicate** with your coworkers by means of **business applications**.

My Busines Apps

beta

Candidate Assessment Draft
Run this app to support candidate interviews

Capex Request
This app is used to issue new capex requests

Capture Web Summit Contacts
This app is used to capture Web Summit Contacts

Commercial Credit Scoring for New Transactions
App used for calculation of credit scoring

Customer Data Management App
This app is used to manage, add, update Customer Information

Daily Sales Activity Report
Reporting Sales Representative Daily Activity for CRM

Generic App Draft
This is a generic app for design purpose only

Intercomapany Loans Management
IC funding

Manage Marketing Planning
Planning and monitoring Marketing Activities

ManageCountries Draft

Management by Objectives
This apps sets, cascades and monitors MBO KPIs, tasks and reviews.

New Business Sales Quotations
This app is used for new business sales quotes

Product Update Form
This is New product design and implementation workflow

Project Change Management Form
Calculate impact and cost of changes

Quarterly Performance Review
Manage by Objectives Process Periodic Review

Request anything (training app) Draft
This app shows some basic mechanics of a request application in Qalcwise

Request New Qalcwise App
Use this app to request new qalcwise business app for your purpose

Sales Invoice Draft
This app issues sales invoices

Sales Invoice Draft
This app issues sales invoices

Sales Invoice Draft
This app issues sales invoices

Sales Invoice Draft
This app issues sales invoices

Sales Quote for New Customers
Create New Sales Quotation for New Business

Sales Quote for New Customers Draft
Create New Sales Quotation for New Business

Take a Test
My tests and certifications

Travel and Expense Management
Use this app whenever travelling on business. Starting from Request, Approvals and Settlements.

Qalcwise Business Apps

Human Resources

+ Employee forms
+ Holidays calculations
+ Evaluation calculations
+ Performance reviews
+ Education portal

Sales & Marketing

+ Quotation calculation
+ Sales Rep reporting
+ Site Sales reporting
+ Pipeline management
+ Customer onboarding
+ Incentive calculation

Operations

+ Product development forms
+ Operations planning
+ Site reporting
+ Fleet management
+ Project forms
+ New product implementation
+ Work orders
+ Workforce management

Finance

+ Business cases calculation
+ Capex evaluation
+ Travel and Epense Forms
+ Capex requests
+ Budget requests

Project Management
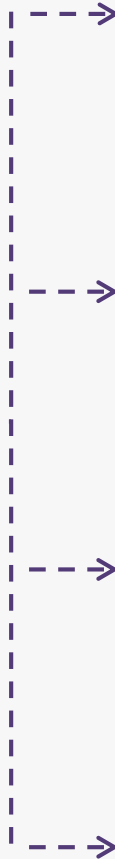
+ Change request forms
+ Requirements gathering
+ Profitability calculation
+ Test forms

With qalcwise, you can create your own applications or acuire apps from **Qalcwise App Marketplace**

Qalcwise App Marketplace

Customer Data Management App
This app is used to manage, add, update Customer Information
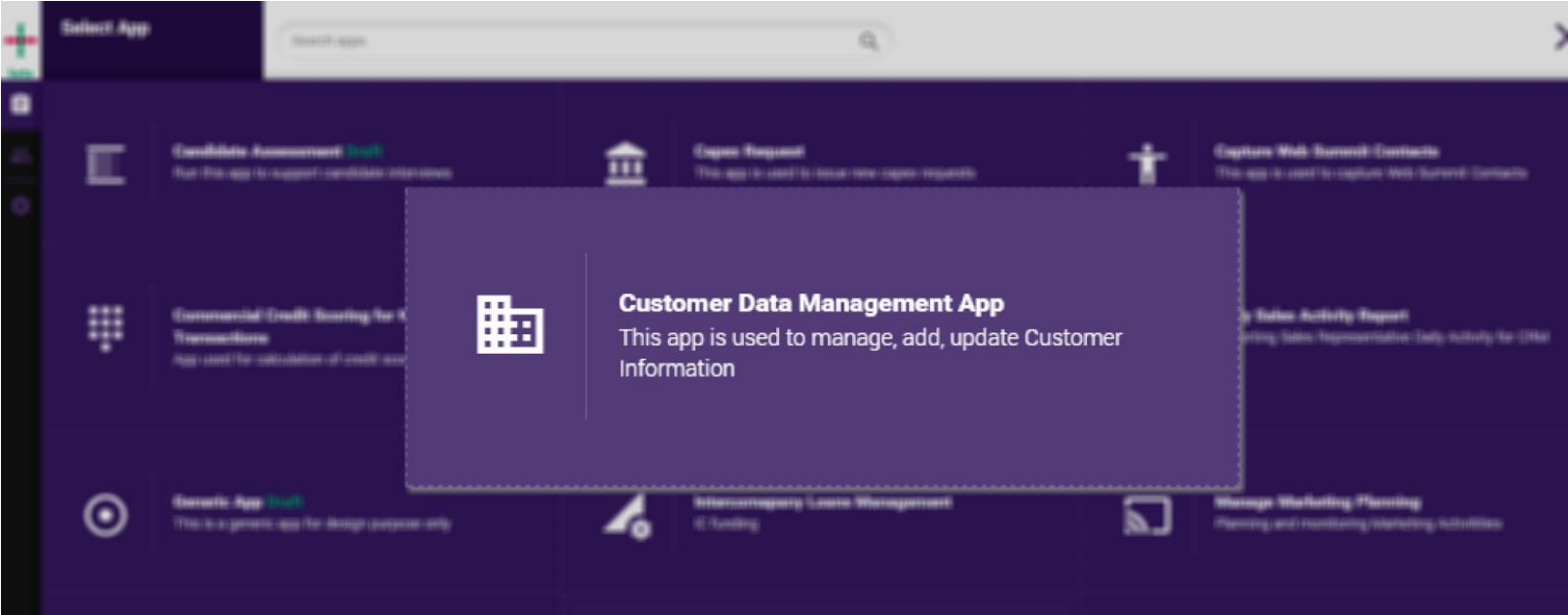
What you can do with Qalcwise

Communicate, collaborate with your, teams, departments, company wide or directly with your colleagues. Share messages, tasks, files, reminders, comment on discussions. Run surveys & reviews. Focus on only important tasks with Qalcwise peace making „Focus" switch. Advanced Search through platform content.

Run workflow enables communication via **Business Applications.** Issue request, obtain approval, discuss numbers, manage data. Drive process based business communication.

Design your own **Business Applications** with ease of spreadsheet like formulas. No coding required. Unprecedented approach to business apps design where business users can create Apps by themselves.

Acquire or Sell your business apps on Qalcwise Apps Marketplace!

Application KPI

Ease decision making.

Email

Password

Remember me   Forgot Password?

Log in

Remember, we finished our previous here.

Cynthia has received information that there is a travel request and that it awaits her attention.

In order to quickly deploy your application you don't need to set anything additional. It's up and running already, but the message provided on application task is basic.

In this tutorial we will learn how to enrich this info to provide more meaningfull info to make decision easier.

Qalcwise HQ

beta

Cyntia White

Focus

O HR

O Travel & Expenses 1

O Project manageme...

O Marketing campaig...

O Capex requests

O Sales incentives

O Workforce

O **Sales**

O **Office**

O **Surveys**

O Qalcwise App Ideas

O **Finance**

O **Sales & Marketing**

O **Credit control**

O **Support**

O **Fleet**

O Education & Cert

O Sales activity

Share a post, task or files on Cyntia White

Today

Draft TRAVEL REQUEST - A task awaits your attention
10:16 AM   WORKFLOW STATE: IN APPROVAL (CYNTIA WHITE)

☐ 🕑 ⬇ 🗑   ◉ TEM

January

Brad Kowalski 1/19/2016 1:39 PM   DUE: 6/30/2016 10:59 PM   SNOOZE: 2/2/2016 12:41 PM

HR performance reviews are due by QE. Guidelines are posted in HR public stream. There is also a new app for 360. Please check also the MBO app.

☐ 🚩 🕑 ⬇ ✓   ◉ Cyntia White

TRAVEL AND EXPENSE MANAGEMENT - Hi Cyntia White. Please approve the business trip for Betty Wiserman travelling to Nexus on 11-4-2016 DEM/1/19/2016

We actually want the travel request message to look like this

Draft TRAVEL REQUEST - Please approve Sales travel request. Prospect customer is Quantus and potential deal size of 98000 kk-14-3-2016

12:49 PM   DUE: 3/14/2016 12:00 AM   WORKFLOW STATE: IN APPROVAL (CYNTIA WHITE)

Where:
San Francisco

What for:
Sales

How long:
3

Responsible: **Krzysztof Kowal**

TEM

Instead of its basic form:

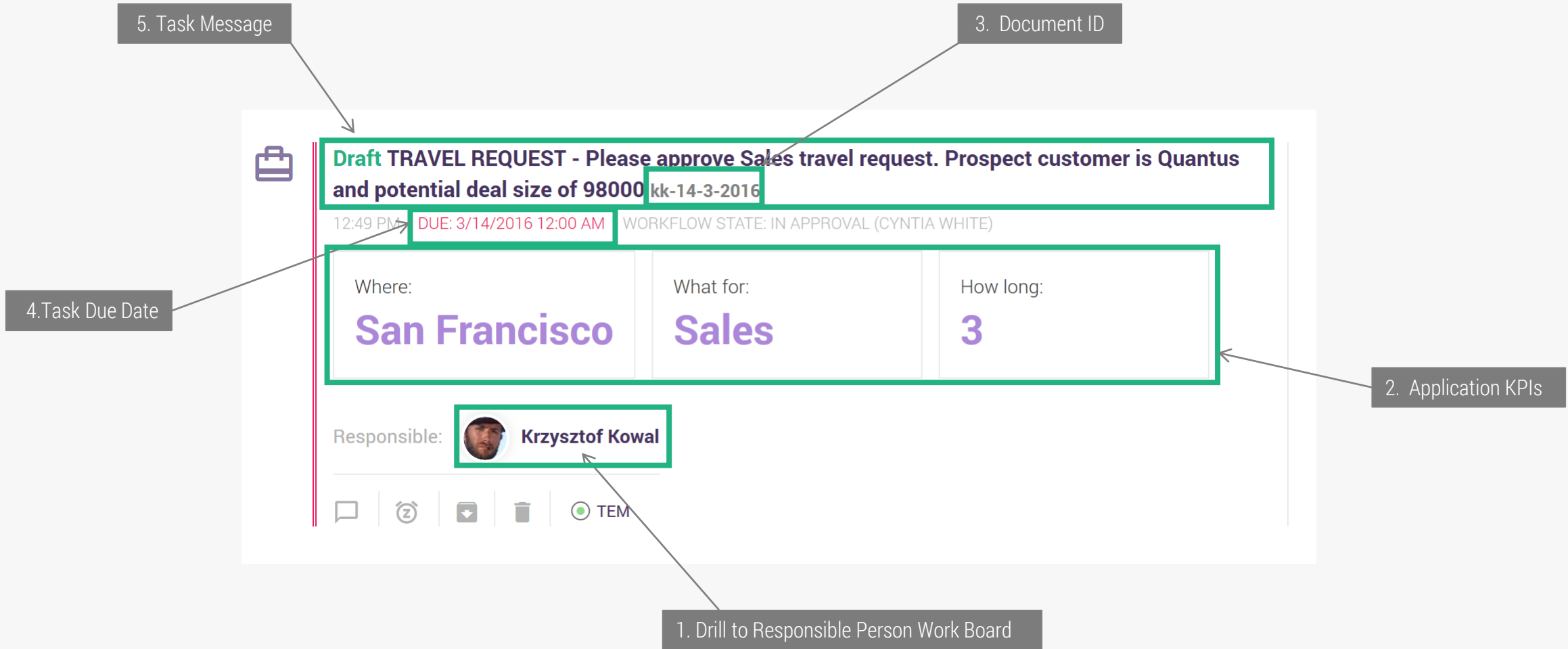**Draft** TRAVEL REQUEST - A task awaits your attention

10:16 AM   WORKFLOW STATE: IN APPROVAL (CYNTIA WHITE)

TEM

There are 5 key component of Application Task Message a Designer can control.

5. Task Message

3. Document ID

Draft TRAVEL REQUEST - Please approve Sales travel request. Prospect customer is Quantus and potential deal size of 98000 kk-14-3-2016

12:49 PM DUE: 3/14/2016 12:00 AM WORKFLOW STATE: IN APPROVAL (CYNTIA WHITE)

4.Task Due Date

Where:
San Francisco

What for:
Sales

How long:
3

2. Application KPIs

Responsible: **Krzysztof Kowal**

TEM

1. Drill to Responsible Person Work Board

Application message content

There are 5 things we can set to supplement application message stripe

a) Define process Responsible Person
b) Define Application KPIs
c) Define Application Document ID
d) Define applications Task Message
e) Set Application Task Due Date

First three things from the above list you can set on Application Info tab in Designer.

Task Message and Due Date can be defined for each application State and Action on Workflow page in Designer.

Of course, you can use qalcwise functions to define all the above content.*)

First, let's defne „Responsible Person"

*) In version 20160311 KPI names must be provided as a text and cannot be calculated, hopefully, by the time you read this tutorial, this will be possible to use functions to calculate KPI names.

| Choose APP Info tab | → | **Info** Widgets Data Properties |

Informations

Name	TEM
Caption	Travel Request
Purpose	This app manages travel and expense process
Version	1
State	Draft

Document ID	→	Document name	=SECTION1.B1

App visibility	Visible
Show formulas	Visible
Alignment	Left
Icon	💼
Type	Instance
Add creators	Start typing...

App creators

ALL ×

Input parameters ⊕

KPIs

APP KPIs and Responsible Person	→	Responsible person	=SECTION1.B2
		KPI name	Cell address
		KPI name	Cell address
		KPI name	Cell address

Streams

Add stream	Start typing...

TEM ×

Setting Responsible Person

Info   Widgets   Data   Properties

Informations

Responsible Person gives us immediate information about who to ask regarding given application task ☺.

You, as a Designer decide, who the „Responsible Person" is in a given business process manager by your application. Sometimes it's the person who starts the process, but often it might be its manager, account owner, etc.

All you need to do is to provide this person email. It can be provided
a)   Directly
b)   Using qalcwise functions like e.g. CreatedBy()
c)   Pulled from your data using Lookup() function
d)   Or referenced from a cell from your app

Any combination of the aboveis allowed, so have fun. ☺

In our example cell section1.B2 contains CreatedBy() formula, so let's use it ☺. CreatedBy() formula returns user email.
Remember it has to be email if you want the responsible person to be drillable.

KPIs

Responsible Person email

Responsible person	=SECTION1.B2	
KPI name	Cell address	
KPI name	Cell address	
KPI name	Cell address	

Streams

| Add stream | Start typing... | |

TEM ✕

Qalcwise HQ
beta

MY WORK BOARD   2

STREAMS   ⊕

Find streams to join

○ HR
◉ Travel & Expenses   1
◉ Project manageme...
◉ Marketing campai...

Cyntia White   Focus ◉ ≡ 🔍

Share a post, task or files on Cyntia White   ➤

Draft TRAVEL REQUEST - A task awaits your attention
11:52 AM   WORKFLOW STATE: IN APPROVAL (CYNTIA WHITE)

Responsible: Krzysztof Kowal

💬 ⏰ 📥 🗑 ⊙ TEM

Setting Application **KPIs**

Info Widgets Data Properties

Informations

Application KPIs where designed to provide quick insight into business process managed by your application.

YOU DECIDE.

Application KPIs can be both text or numbers.
They are defined on Application Info tab in Designer.
You can define up to 3 KPIs.

They need to be referenced in your application cell.
(don't use ,=, sign here, just click a cell which contains a value you would like to become a KPI.

KPIs

Responsible person	=SECTION1.B2
Where	SECTION1.B3
What for	SECTION1.B4
How long	SECTION3.B1

Responsible
Person email

Streams

Add stream	Start typing...

TEM ✕

Cyntia White

Focus

beta

Share a post, task or files on Cyntia White

Draft TRAVEL REQUEST - kk-12-3-2016   12:57 PM   WORKFLOW STATE: IN APPROVAL (CYNTIA WHITE)

Where:	What for:	How long:
Seatle	**Sales**	**10**

Responsible: **Krzysztof Kowal**

TEM

Setting Document ID

One additional feature available to you is ability to define your App Instance ID.

This is especially usefull when you run processes which create new app document / request / records / etc…

It may also be useful when integrating or passing „documents" to other systems like accounting or CRM.

In this example we can assign a „Document ID" to each travel request. We decided that our travel request ID will consist of first letter of requester first name followed by first letter of his last name and request date.

The following function will calculate our request ID.

```
=concat(left(B2,1), mid(B2,
find(B2, '.')+1,1),'-',
datetostring(WORKFLOWINFO.B1))
```

Where B2 cell contains `CreatedBy()` formula
And workflowinfo.B1 cell contains `CreatedAt()` formula

Choose APP Info tab

| Info | Widgets | Data | Properties |

Informations

Name	TEM
Caption	Travel Request
Purpose	This app manages travel and expense process
Version	1
State	Draft

Document ID

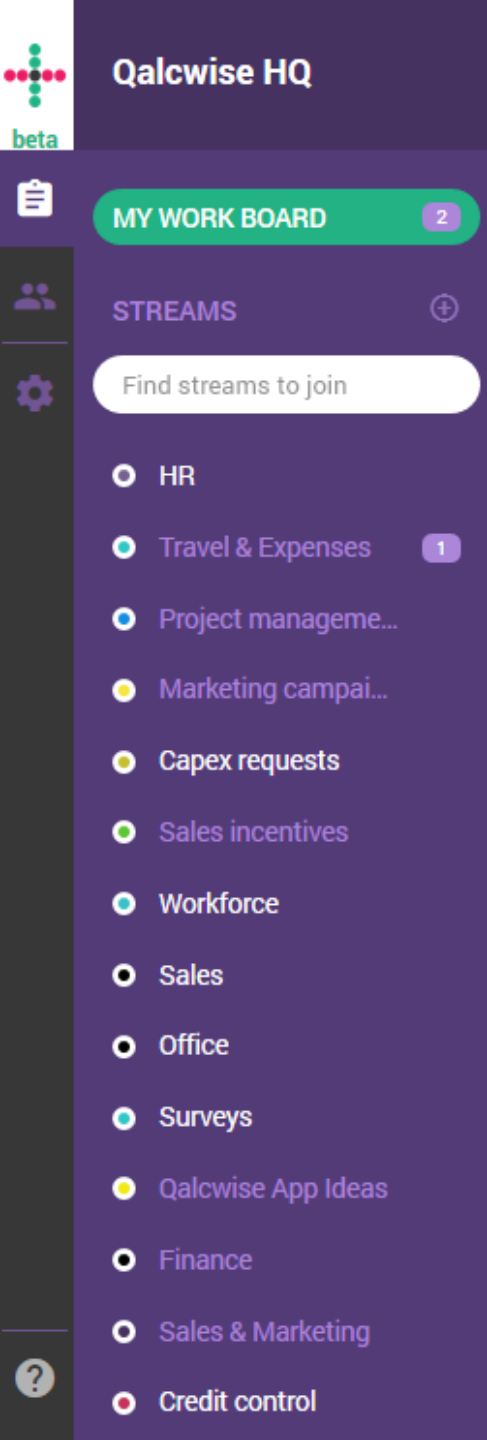| Document name | =SECTION1.B1 |

Cyntia White

Focus

Share a post, task or files on Cyntia White

Draft TRAVEL REQUEST kk-12-3-2016 12:57 PM WORKFLOW STATE: IN APPROVAL (CYNTIA WHITE)

| Where: | What for: | How long: |
| **Seatle** | **Sales** | **10** |

Responsible: **Krzysztof Kowal**

TEM

We have set:

1. Responsible Person
2. Application KPI's
3. Document ID

Let's switch to workflow now

4. Task Due Date
5. Task Message
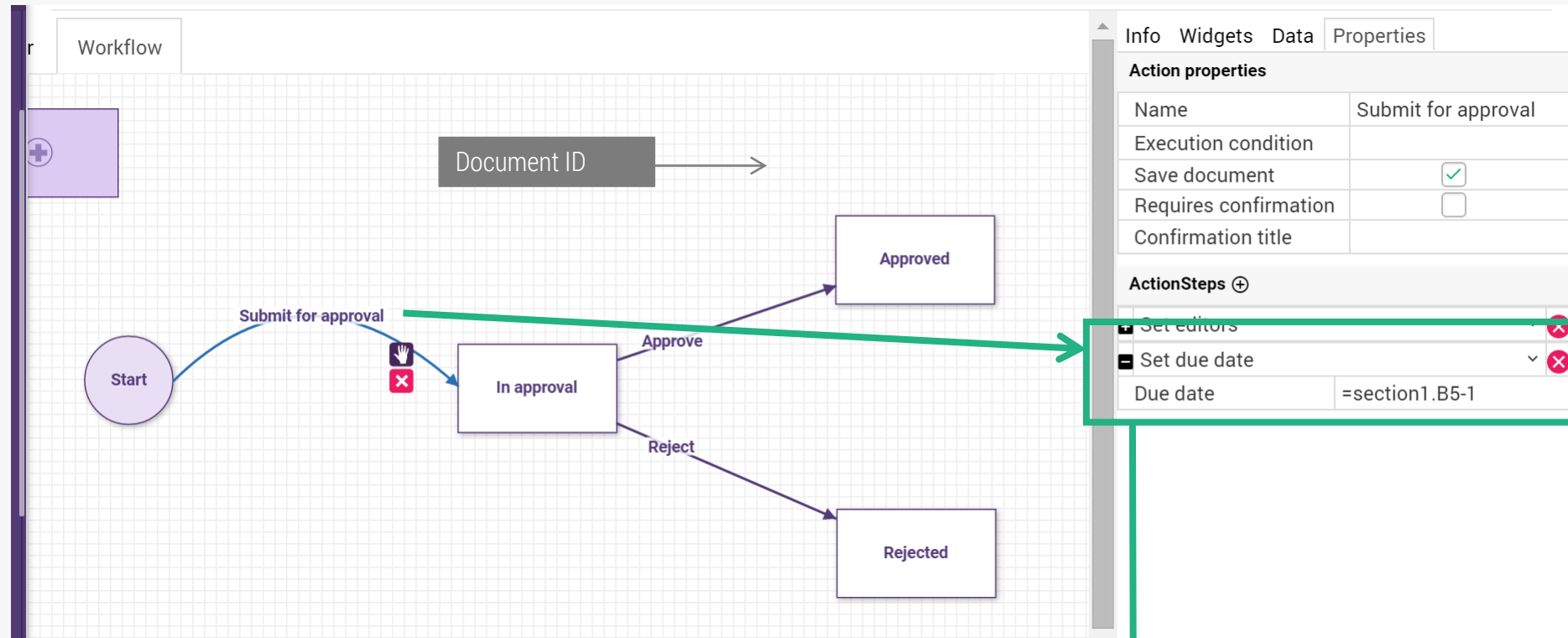
Setting Task Due Date

If required you may also set task due date.

In order to do that you need to add Action Step to your action or State in Workflow Design. You do that by clicking ⊕ sign by ActionSteps and choosing „Set due date" action step.

Every Action can set/change the due dates, so your subsequent steps in process may have its own deadlines assigned.

In our example travel request we will set task approval due date for just one day before departure. Action „Submit for approval" will set the Due Date.

Cell `section1.B5` contains departure date, so our formula is `=section1.B5-1.` That's it.

Workflow

Document ID →

Submit for approval

Start

In approval

Approve → Approved

Reject → Rejected

Info Widgets Data Properties

Action properties

Name	Submit for approval
Execution condition	
Save document	☑
Requires confirmation	☐
Confirmation title	

ActionSteps ⊕

Set editors	
Set due date	
Due date	=section1.B5-1

Draft **TRAVEL REQUEST - kk-14-3-2016** 11:58 AM DUE: 3/13/2016 12:00 AM WORKFLOW STATE: IN APPROVAL (CYNTIA WHITE)

Where:	What for:	How long:
San Francisco	**Sales**	**4**

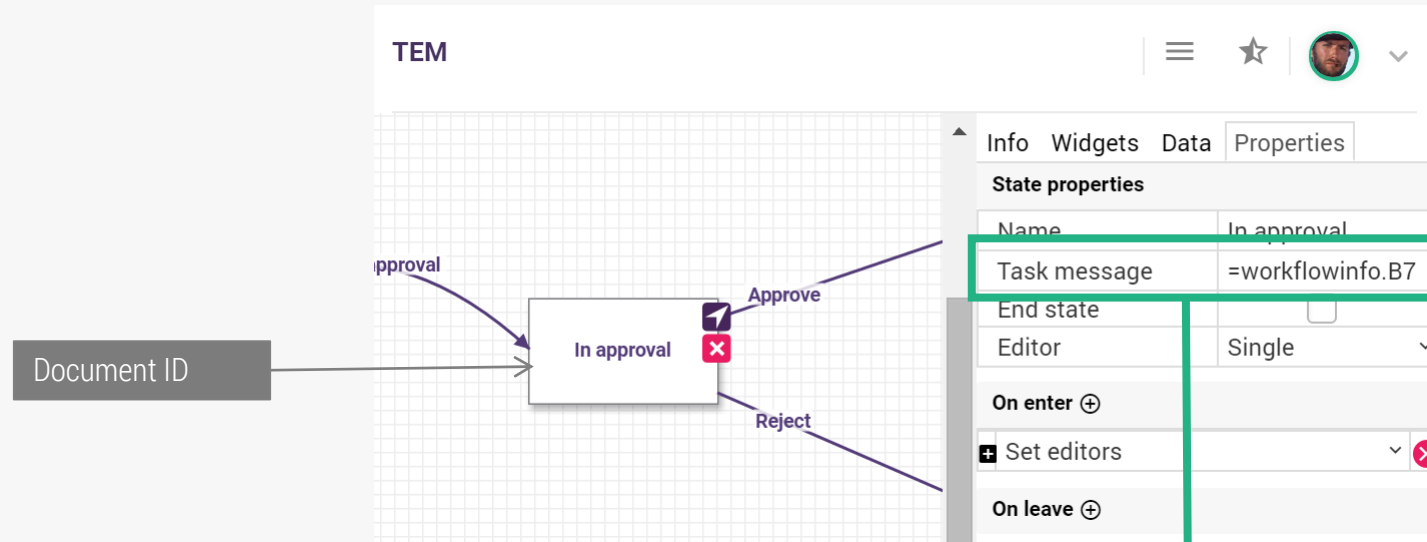Responsible: **Krzysztof Kowal**

TEM

Setting Task Message

Application Task message can be set in 2 ways.

1) Using an Action Step, similar to setting Due Data as it was in previous example
2) By setting „Task message" field when editting worflow State.

You can „calculate" Application Task using formulas. Concat() formula glues texts separated by commas. You will use it a lot.

In our example we decided to display different texts depending on whether the trip is sales related or not. Sample formula you can see below.

Feel free to experiment with your own process.

TEM

Info Widgets Data Properties

State properties

Name	In approval
Task message	=workflowinfo.B7
End state	☐
Editor	Single

On enter ⊕

▣ Set editors

On leave ⊕

approval

Approve

In approval

Reject

Document ID

💼 **Draft TRAVEL REQUEST - Please approve Sales travel request. Prospect customer is Quantus and potential deal size of 98000** kk-14-3-2016

12:49 PM   DUE: 3/14/2016 12:00 AM   WORKFLOW STATE: IN APPROVAL (CYNTIA WHITE)

WorkflowInfo

=if(SECTION1.B4='Sales', concat(B6,'. Prospect customer is ',SECTION2.B1, ' and potential deal size of ', text(SECTION2.B2)),B6)

	A	B	C	D
1	CreatedAt	=CreatedAt()		
2	SubmitedAt	=StateFirstEnterDate('In approval')		
3	ApprovedAt	=StateFirstEnterDate('Approved')		
4	Approved	=(CurrentState()='Approved')		
5	Rejected	=(CurrentState()='Rejected')		
6	Message1	=concat('Please approve ',SECTION1.B4, ' travel request')		
7	Message	=if(SECTION1.B4='Sales', concat(B6,'. Prospect customer is ',SECTION2.B1, ' and potential deal size of ', text(SECTION2.B2)),B6)		
8				

How long:

3

THAT'S IT.

qalcwise
Business Applications Cloud

You have how to enrich application tasks information
in order to help business make decisions easier and faster.

You have learned how to

a)   Define process Responsible Person
b)   Define Application KPIs
c)   Define Application Document ID
d)   Define applications Task Message
e)   Set Application Task Due Date

Qalcwise HQ

beta

MY WORK BOARD 2

STREAMS ⊕

Find streams to join

- ○ HR
- ○ Travel & Expenses 1
- ○ Project manageme...
- ○ Marketing campai...
- ○ Capex requests
- ○ Sales incentives
- ○ Workforce
- ○ Sales
- ○ Office
- ○ Surveys
- ○ Qalcwise App Ideas
- ○ Finance
- ○ Sales & Marketing
- ○ Credit control

END

Check Other Units

Qalcwise Collaboration Workspace -Admin Options

Qalcwise Collaboration Workspace –Advanced Search

Qalcwise Designer – Tutorial Series

Qalcwise Designer – Working with Data

Qalcwise Designer – Data imports

Qalcwise Designer – Advanced Workflow

Qalcwise Designer – Advanced APP design options

Qalcwise API Integrations (coming soon)

Qalcwise - Sample Apps

Qalcwise Applications Marketplace