Exercises for the Kianda Foundation Course - Basics

v1.4

Introduction

These exercises are designed to accompany the Kianda Foundation course. Follow each video in the section listed below to guide your work.

Getting started

1. Login to your Kianda workspace and add a profile picture to your account.
   For more information see Section 1, Lesson 5 Getting familiar with your workspace.
2. Use the left-hand side menu to go to Administration > Subscription and find where the Global CSS file is held, Javascript file and view other files stored in Kianda.
   For more information see Section 1, Lesson 6 How to personalise your workspace.

Create your first process

1. Create a new process from scratch within a group called 'Training'. Give the process a title using your initials with the wording **test-process**, for example, Jack Ryan's process is 'JR-test-process'.
   For more information see Section 2, Lesson 4 Creating your first process.
2. Rename the first form as **Request**.
3. Save the process.

Add forms

1. Add a second form called **Maintenance**.
   For more information see Section 2, Lesson 5 Introduction to forms.
2. Assign different colours to the form tabs.
3. Save the process.

Introduction to controls

1. In the **Request form** add controls.
   For more information see Section 2, Lesson 7 Introduction to controls.
   The controls to add are:
   - A list field called **Project –** type in the manual values: Project 1, Project 2, Project 3, Project 4, Project 5

- A textbox called **Address**

2. In the **Maintenance form** add the following controls:

   - A text box called **Comments** and make this field 3 rows long

   - A text box called **Sentiment**

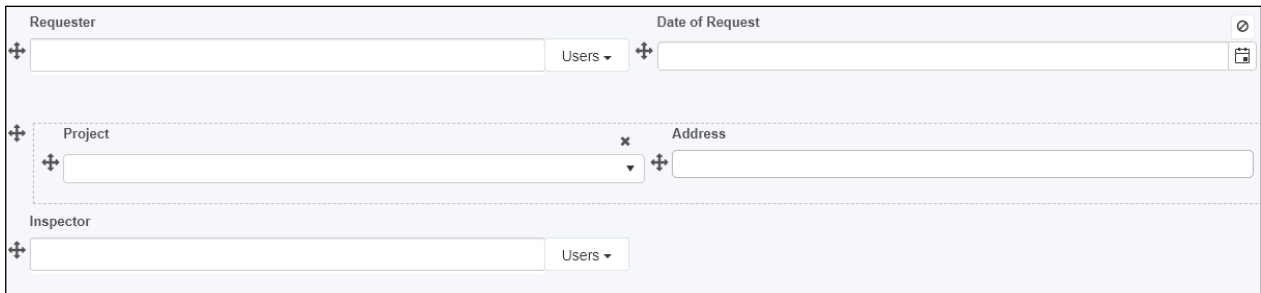3. Save the process. At this point the second form called Maintenance in your process should look like this:

Edit properties

1. In the **Request form** add the following controls, for more information see Section 2, Lesson 8 Edit properties:

   - A user picker field called **Requester**

   - A second user picker field called **Inspector**

   - A toggle button called **Urgent** and set 'Value when enabled' to Yes, and 'Value when disabled' to No

   - A date field called **Date of Request**

   - A panel called **Details panel** and add the Requester and Date of Request fields into the Details panel

   - A panel called **Project info** and add this into the **Details panel**. Add the Project list, Address field into the Project info panel.

   - Add the Inspector user picker field into the Details panel, underneath the Project info panel.

2. Tidy the fields in each form by making each field half the layout size for example, the Layout properties for the user picker field Request should look like this:

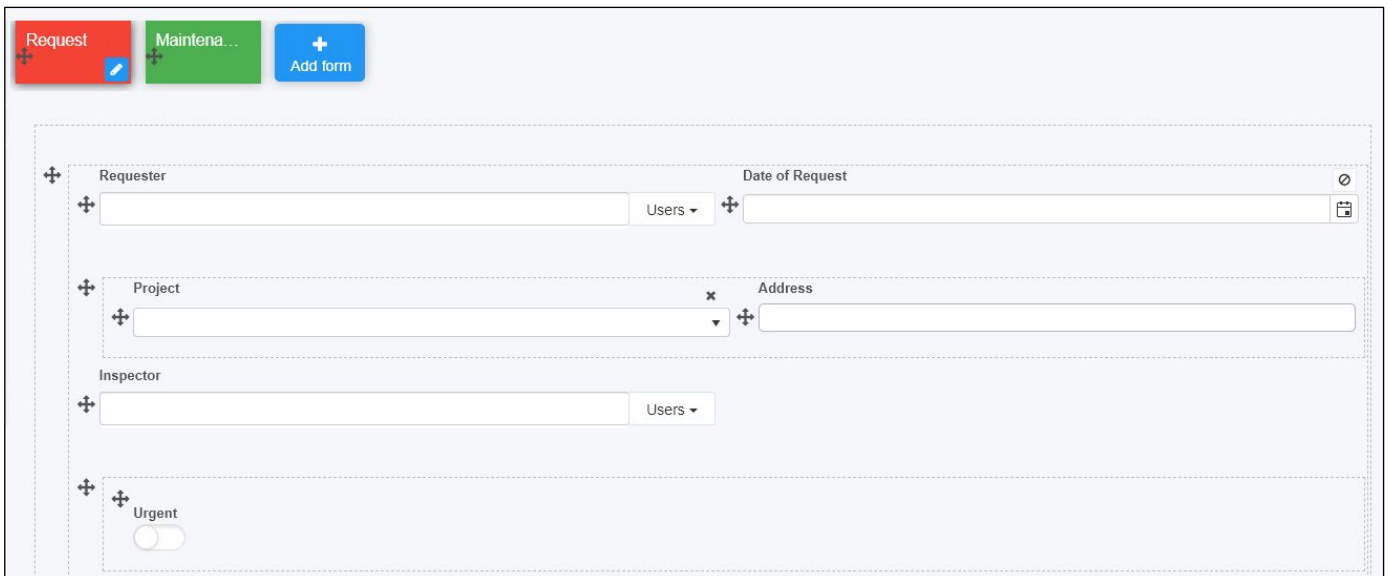| Field type	User picker
Title	Requester
Show title	✓
Required	✓
Enabled	✓
Visible	✓
Layout	✗ ⌄

3. Make the toggle button **Urgent** as small as it can be using the layout property.

4. Rearrange the fields in the panels so that the **Request form** looks like this:

5. In the Request form, add the following and make each field layout half the width of the page:

    • Add a panel called **Urgency**

    • Add the Urgent toggle button into the Urgency panel

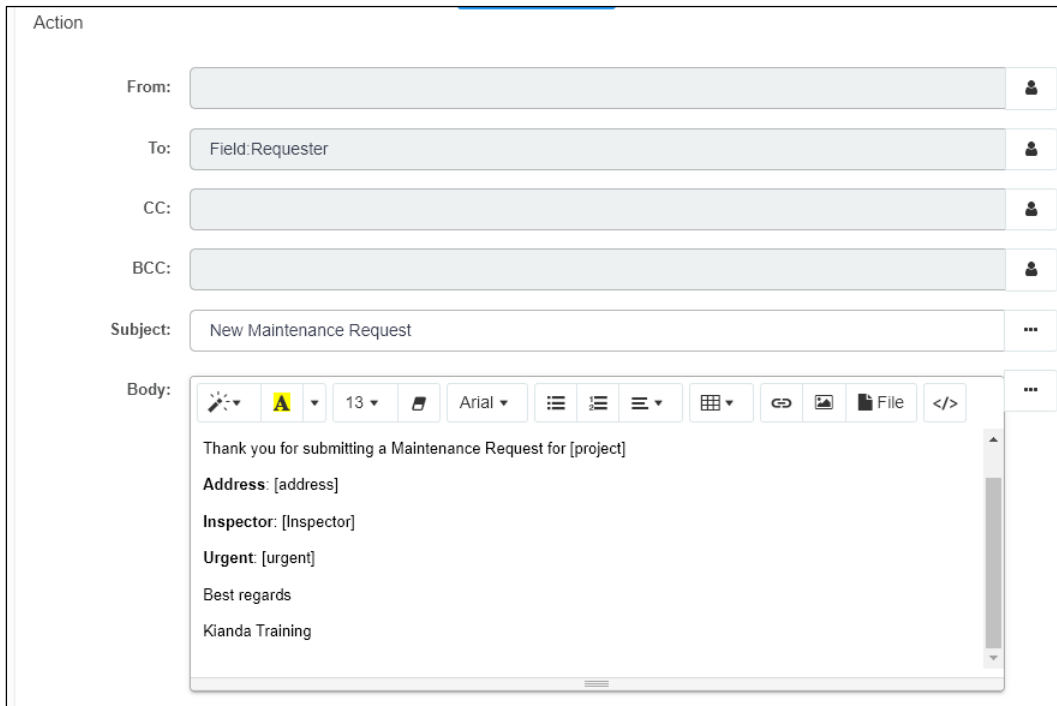6. Save the process. At this point the first form in your process should look like this:

Introduction to rules

1. Add a **Send email** rules to the **Submit button** of the **Request form**.

   For more information see Section 2, Lesson 9 Introduction to rules.

2. Call the rule **Email Requester** and set up the email as follows:

   - Use the **Requester** field in the 'To' part of the email.

   - Set the email Subject as 'New Maintenance Request'

   - Create an email body that opens 'Hi [Requester field ID]' and add in the address, inspector name and urgent fields as shown in the next image. Use the **Expressions** button to add these in.
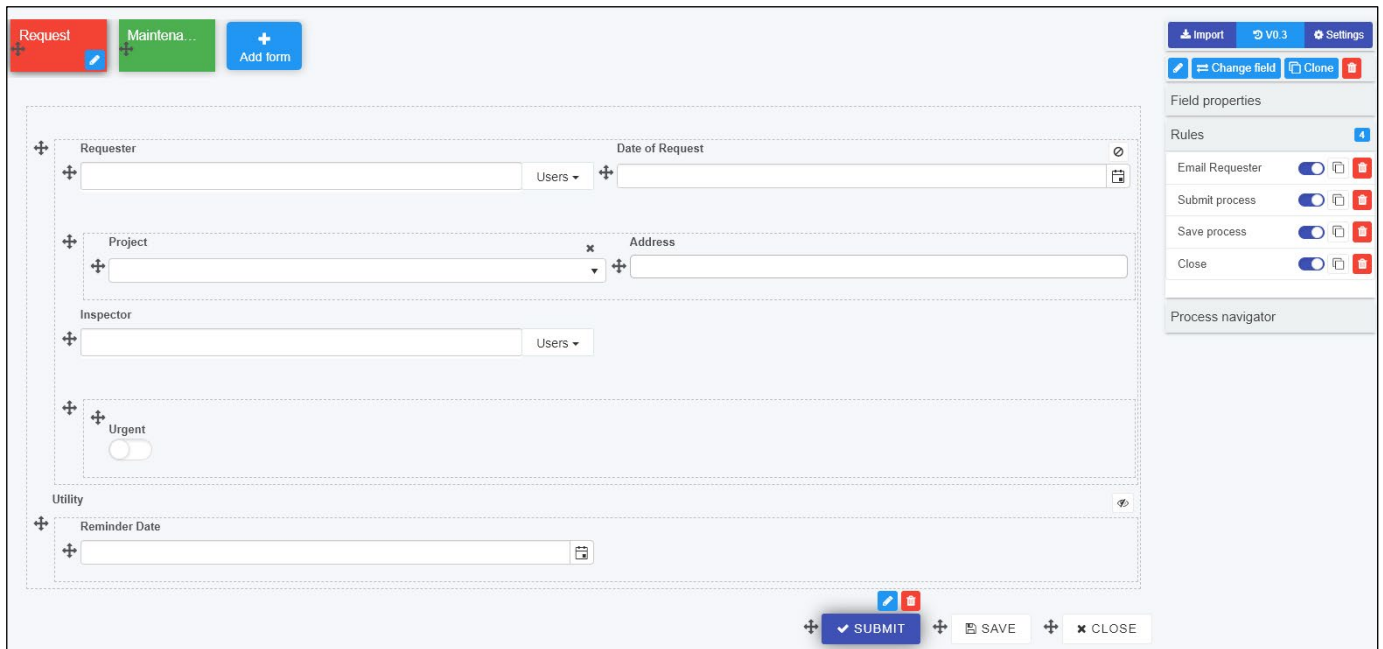

3. Move the Send email rule to the top of the rule list for the Submit button.

4. Save your work and use the Previewer to run a record. The end result of this is that an email should be sent to the user chosen in the Requester user picker field.

Input controls

1. Add controls to both **Request** and **Maintenance forms** as follows. For more information see Section 3, Lesson 2 Input controls.

2. In the **Request form** adjust the fields as follows:

   - For the date field **Date of Request**, uncheck **Enabled property** and make this date autofill [Hint: see Edit field dialog box and field called 'Set default date onload']

   - Make Requester, Project, and Address fields **Required**

3. In the **Maintenance form** add the following controls and make each field in the form (except panels) half the available layout size:

   - A date field called **Date of maintenance –** uncheck **Enabled property** and make this date autofill [Hint: see Edit field dialog box and field called 'Set default date onload']

   - Two panels, one called **Inspection checklist panel** and the other called **Inspection details**

   - In the first panel **Inspection checklist panel**, add in a table called **Inspection checklist** and amend as follows:

       o Rename the first column as **Category**

o Rename the second column as **Question**

o Add another column by adding in a list – a radio list – to this table, call this **Result** and enter in the details as follows, making the display format 'Radio list' and choose position as 'Horizontal'
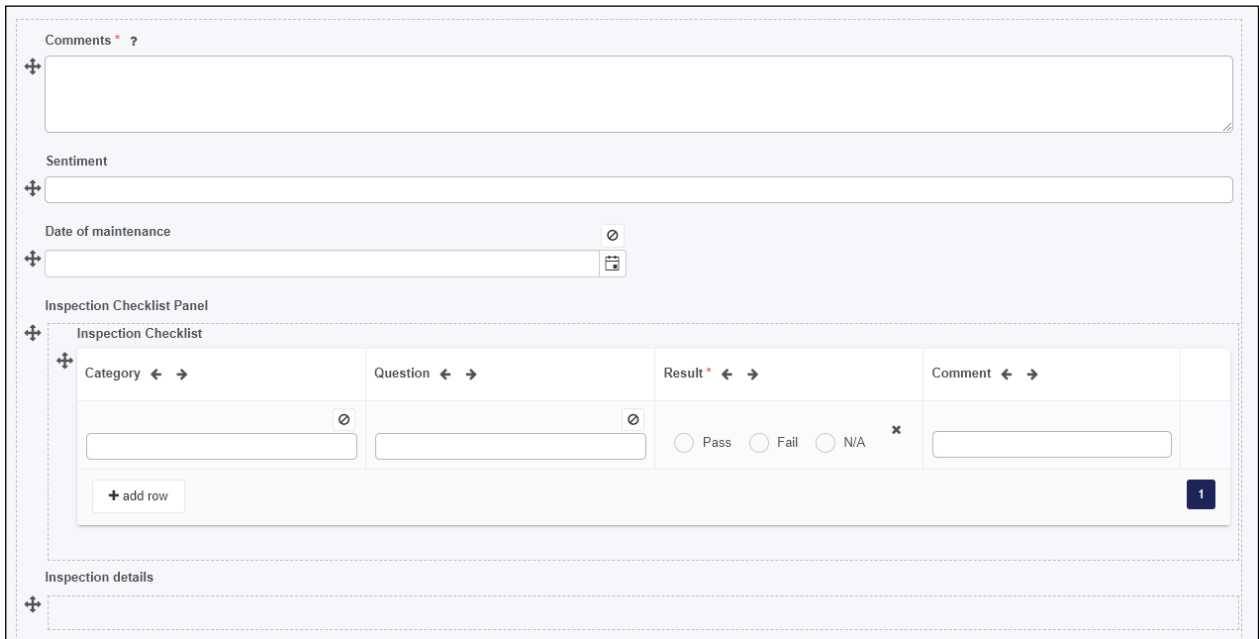

o Make Result a required field, make Category and Question not visible, and Question not enabled

o Add another column by adding a textbox and rename as **Comment**

o Change the order of columns if needed so they display from left to right as Category, Question, Result, Comment as follows:
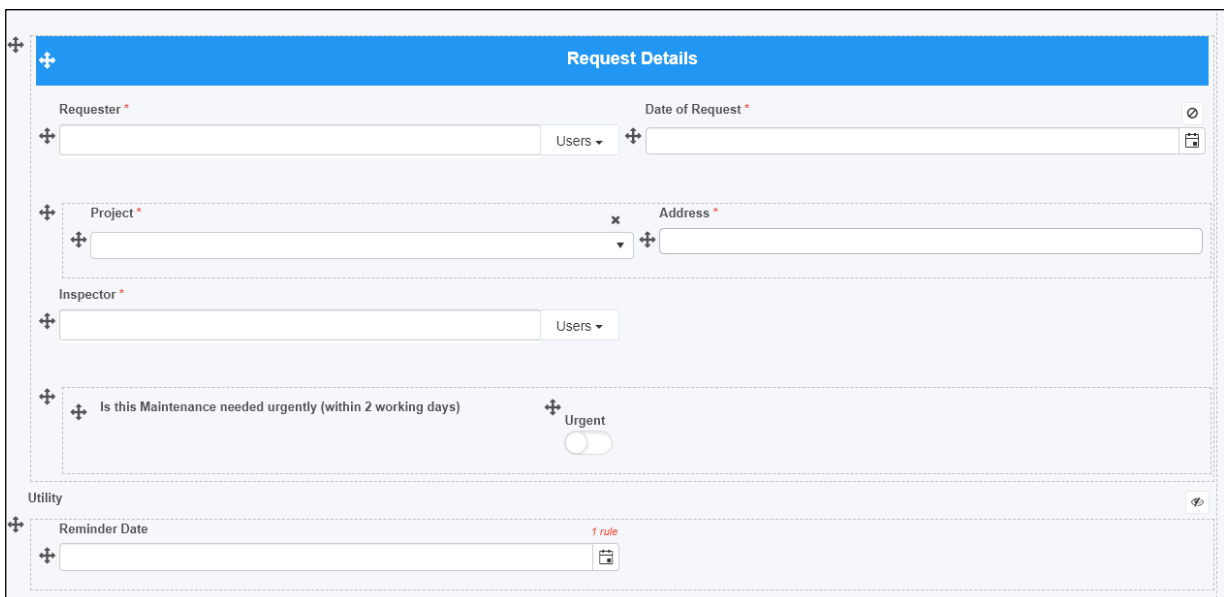
4. Save your work. At this point the second form, Maintenance, in your process should look like this:

Layout controls

1. Add controls to both **Request** and **Maintenance forms** as follows. For more information see Section 3, Lesson 3 Layout controls.

2. In the **Request form** add the following:

   - Add a **Richtext** field called **Request details** at the top of the **Details panel** and add in the text 'Request Details' in a large, centred font and choose a colour scheme.

   - Add a second **richtext** field called **Urgent richtext** and add in the text 'Is this inspection needed urgently (within 2 working days)', half the layout size and add this to the **Urgency panel** so that the overall effect is as follows:

3. In the **Maintenance form** add the following to the **Inspection details panel**:

   - Add a **field group** called **Request details** and choose fields that you want to use from the Request form namely:
     - Inspector
     - Project
     - Address

4. Add a third panel called Utility, make this panel not visible and add three panels within that panel:

   - one called **Maintenance files** and half the layout size
   - one called **Template** and half the layout size
   - one called **Analysis** and have this underneath the two panels above
   - On all panels check the property called Show title to show the title of the panel

5. Add the textbox field called **Sentiment** to the Analysis panel

6. Add a number field called **Score** to the Analysis panel

7. Add a **Signature** field and call it **Signature**. Use the default values presented in the Edit Signature dialog box and click on OK.

8. Save your work. At this point the second form, Maintenance, in your process should look like this:

Kianda Add-in

1. Open Microsoft Word and install the Kianda Word Add-In to create a template which will be used in the next exercise 'Action controls'. For more information see Section 5, Lesson 9 Kianda Add-in. Install the Add-In by clicking on **Insert > Get Add-in** and search for **Kianda**. Click on **Add**. The Kianda Add-In appears in the ribbon of Microsoft Word.

2. Click on the Add-in and login to your environment with your Kianda username and password.

3. Then connect to your Process by clicking on the process selector button and search for your process name in the drop-down list.
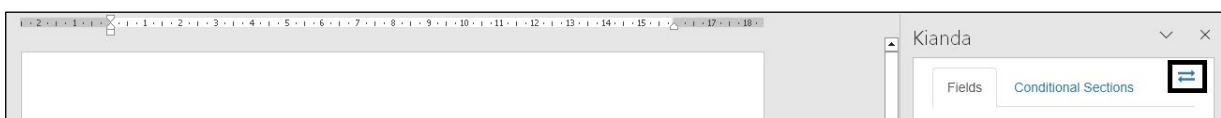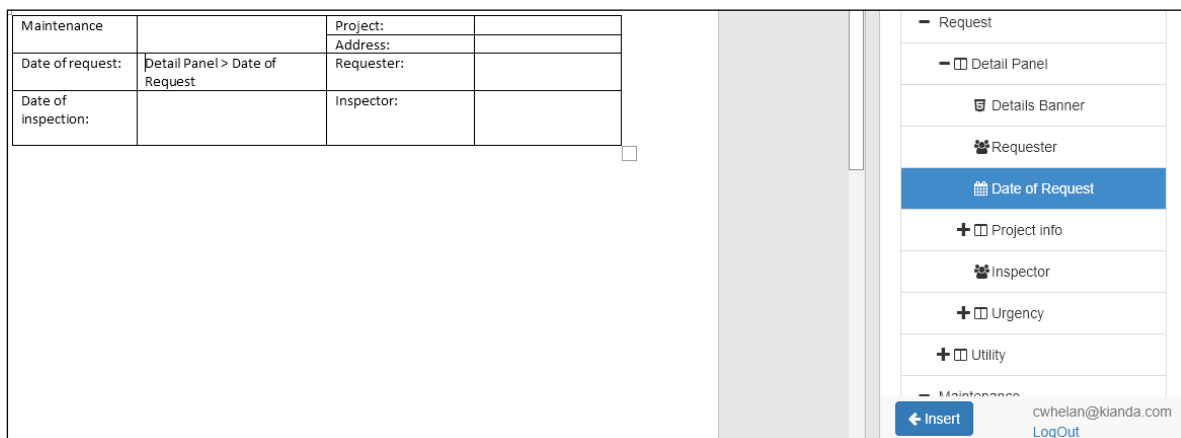
4. Then use the fields in the process to build a template that will be used within the process design to capture data each time a record is created using that design. Build the template as follows:

- Create a table 4 columns x 5 rows and fill in information as follows, where this table will serve as a header for the document template:

Maintenance		Project:	
		Address:	
Date of request:		Requester:	
Date of inspection:		Inspector:	

- Merge the cells from two rows of the first and second columns so the effect is as follows:

Maintenance		Project:	
		Address:	
Date of request:		Requester:	
Date of inspection:		Inspector:	

- Use the form details to add in form fields into the template by positioning the cursor in the second row, second column cell and then in the right-hand pane drill down to the Request form > Detail panel > **Date of request** and click on **Insert** to add in this field as shown below.

- Repeat this process to add in further fields for:

- o **Project info > Project**
- o **Project info > Address**
- o **Detail panel > Requester**
- o **Detail Panel > Inspector**

Maintenance		Project:	Project info > Project
		Address:	Project info > Address
Date of request:	Detail Panel > Date of Request	Requester:	Detail Panel > Requester
Date of inspection:	Maintenance > Date of maintenance	Inspector:	Detail Panel > Inspector

- Underneath the table above, add in the form table found in the Maintenance form > Inspection Checklist Panel > **Inspection Checklist table**

Maintenance		Project:	Project info > Project
		Address:	Project info > Address
Date of request:	Detail Panel > Date of Request	Requester:	Detail Panel > Requester
Date of inspection:	Maintenance > Date of maintenance	Inspector:	Detail Panel > Inspector

Category	Question	Result	Comment
[category]	[inspectionChecklistPanel-f1-row1-text1]	[result]	[inspectionChecklistPanel-f1-row1-text2]

- Underneath the Inspection Checklist table, create a textbox to add in the Maintenance form > **Comments textbox** field
- Finally add in three rows for **Sentiment**, **Score** and **Inspectors Signature** as shown below and add in the related fields from the Maintenance form:

Maintenance > Comments

Sentiment: Analysis > Sentiment

Score: Analysis > Score

Inspectors Signature: Maintenance > Signature

5. Save the file on a local or network drive as Kianda Foundation – Maintenance Template.docx. This file will be used in the next set of exercises under 'Action controls'.

Actions controls

1. Add controls to both **Request** and **Maintenance forms** as follows. For more information see Section 3, Lesson 4 Action controls.

2. In the **Request form**, add the following:

   - Add a second **button** called **Reminder** at the end of the form (outside the form body and not part of a block) and give the button a colour scheme. This button will be used to trigger rules within the process. Uncheck **Visible** for the button property so that the button remains invisible to the user.

3. In the **Maintenance form** add the following fields:

   - Add a **File field** called **Checklist Excel** to the **Maintenance files panel** within the **Utility panel**. Use Kianda Files as the Destination by clicking on Destination > Kianda and Files. Within the Edit field dialog box, check Yes for Allow file override and use all other default settings. Click on OK and then add the **Checklist.xlsx** to the File field by clicking on the **Browse** button.

     Checklist.xlsx

   - Add a second **File field** called **Template** to the **Template panel** within the **Utility panel**. Use Kianda Files as the Destination by clicking on Destination > Kianda and Files. Within the Edit field dialog box, check Yes for Allow file override and use all other default settings. Click on OK and then add the **Kianda Foundation – Maintenance Template.docx** created in the last exercise (Kianda Add-in) to the File field by clicking on the **Browse** button.

   - Add a third **File field** called **Generated Report** to the **Template panel** within the **Utility panel.** Within the Edit field dialog box, use Kianda Files as the Destination by clicking on Destination > **Kianda** and **Files**. Within the same dialog box, check **Yes** for **Allow file override** and use all other default settings as follows:

Kianda

Title

Generated Report

Name (Unique)

generatedReport

Help text

Custom CSS class name

Save location

📂 Destination

Kianda » Files

Open file behaviour   ● Download   ○ Open in browser

Folder structure

● None

○ Under {process} folder

○ Under {process}/{form} folder

○ Custom

Allow file override   ○ No   ● Yes
Allow remove file   ○ No   ● Yes
Remove and delete file   ?   ○ No   ● Yes
Allow uploading multiple files   ● No   ○ Yes
File name options

● Original file name

○ Auto generated

○ From form field

File extension (Leave empty for any)   Enable media capture ?   ○ Yes   ● No

.pdf or image/* or video/*

Button text   Button icon default: 📄

Browse   ▼

Enable background upload ? ☐   Show uploaded files count ○ Yes   ● No
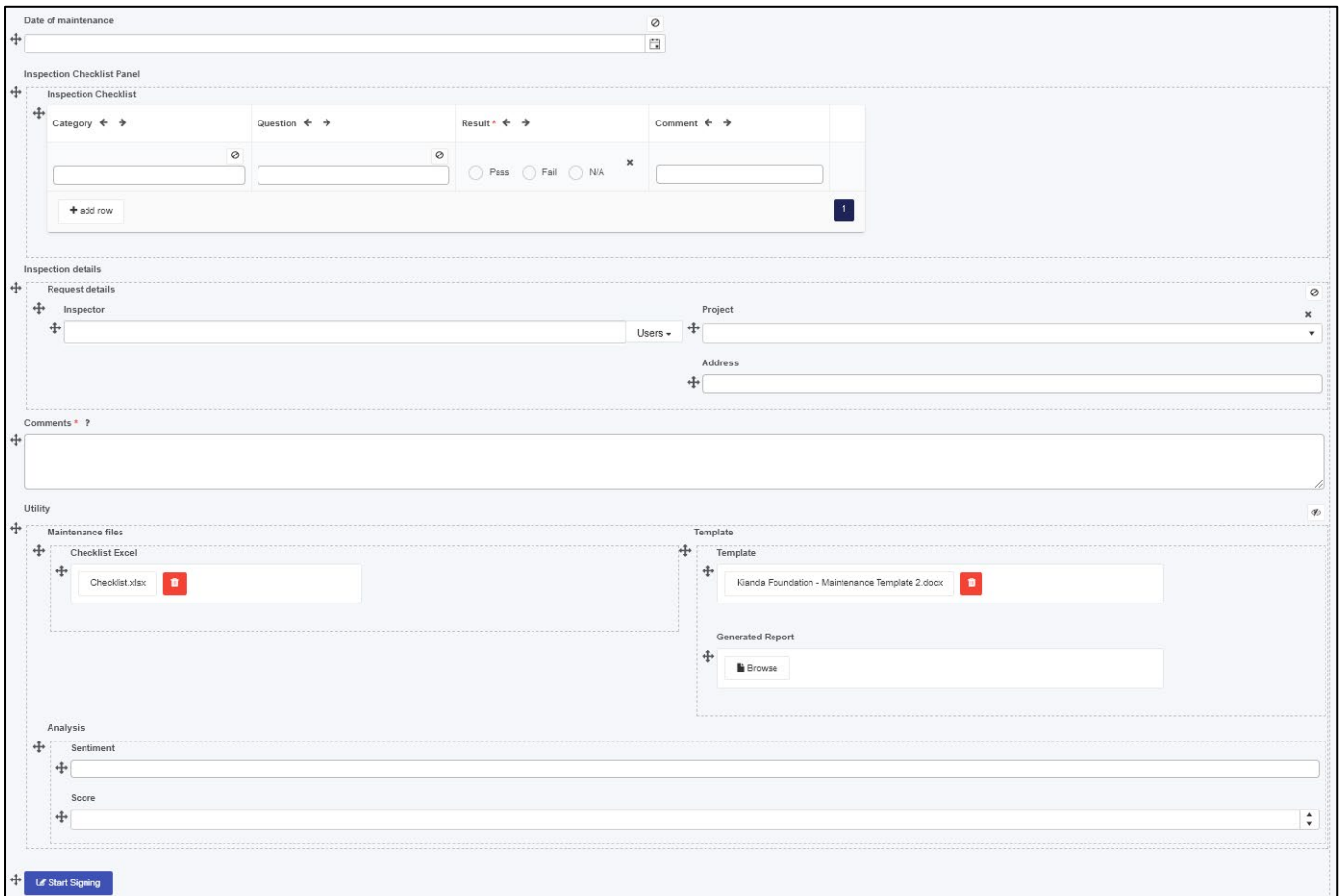
Enable chunked
upload   ? ☐

- Click on OK so once the file fields are in, the Utility panel looks like this:

Utility

✛ Maintenance files   Template

✛   Checklist Excel   ✛   Template

✛   Checklist.xlsx 🗑   ✛   Kianda Foundation - Maintenance Template.docx 🗑

Generated Report

✛   📄 Browse
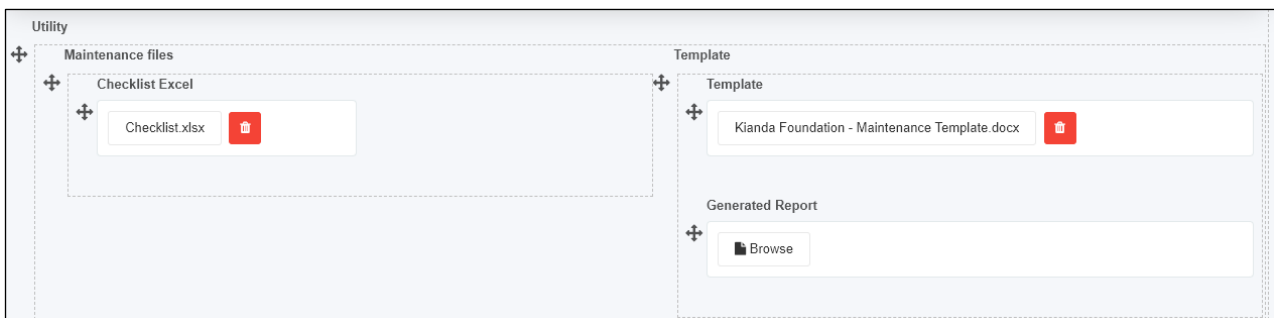
- Reorder the form by:
    - Moving the **Date of maintenance date** field to the top of the form
    - Move the **Inspection Checklist panel** under the Date of maintenance field
    - Move the **Inspection details panel** under the Inspection Checklist panel
    - Move the **Comments textbox** under the Inspection details panel, and make the **Comments textbox** field **Required**
    - Move the **Utility panel** under the Signature field, and make the Utility panel not visible (uncheck the Visible property)
    - Move the **Signature field** under the Utility panel
9. Save your work. At this point the second form, Maintenance, in your process should look like this:

Conditions and Expressions
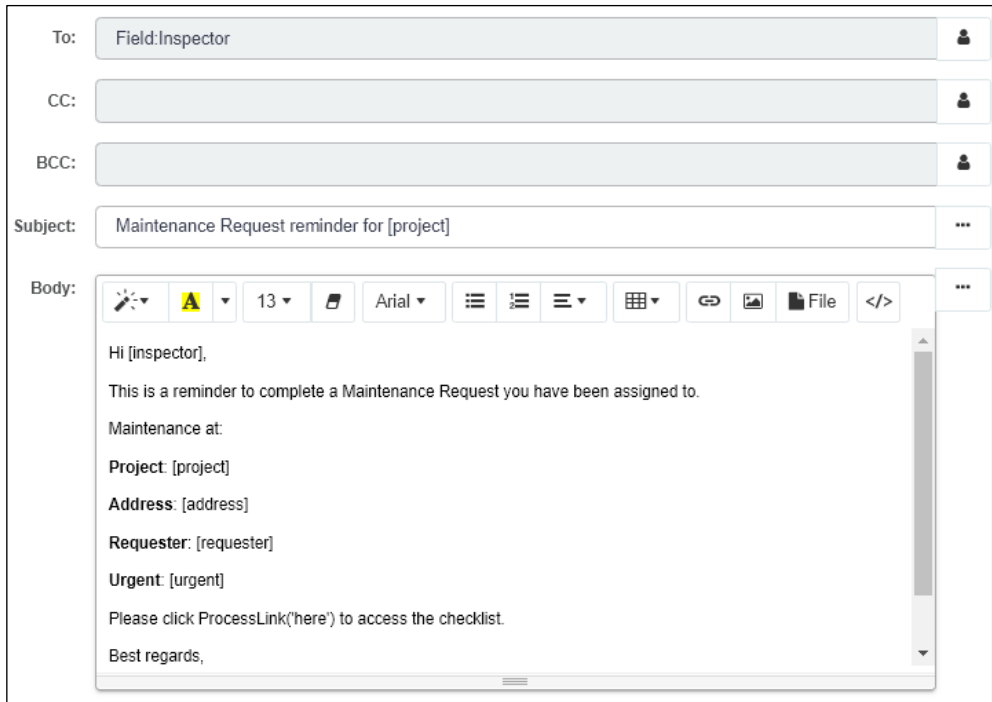
1. Add two **Send email rules** to the **Request form**, one that requires doesn't use a condition, and one that does as described below. For more information on conditions,

see Section 4, Lesson 2 Conditions. In each case use Expressions in the body text of the email, for more information on expressions see Section 4, Lesson 3 Expressions.

2. Add the first **Send email rule** to the **Submit** button of the **Request** form by copying the existing Send email rule called **Email Requester**. Click on the **Duplicate rule** button beside Email Requester and click on **OK**. This is shown in Section 5, Lesson 8 Import and clone. Open the newly copied email and change the following:

    - Change the title of the rule to **Email Inspector**
    - Change the 'To' field to the User picker field **Inspector**
    - Change the 'Subject' text to 'New Maintenance Request for [project]'
    - Change the body to say Hi [Inspector]
    - Add the Requester details to the body text using the **Requester User picker field**
    - Create a link to the Process instance using the ProcessLink() expression so that the email looks like the following:

To:	Field:Inspector	👤
CC:		👤
BCC:		👤
Subject:	New Maintenance Request for [project]	···

Body:

Hi [Inspector],

A new Maintenance Request has been submitted for:

Project: [project]

Address: [address]

Requester: [requester]

Urgent: [urgent]

Please click ProcessLink('here') to access the checklist.

Best regards

Kianda Training

3. Add another **Send email rule** to the **Reminder button** in the Request form. This email will be used to send a reminder to the Inspector to perform the check while the request is still 'open'. Fill out the rule details as follows:

    - Change the title of the rule to **Remind Inspector**
    - Change the 'To' field to the User picker field **Inspector**
    - Make the subject 'Maintenance Request reminder for [project]'

- Add similar details to the body of the email as before, adding in expressions to automate the name of the Inspector, Project, address, requester, urgent and a link to the process instance as follows:

- In addition to the steps above click on the **Edit conditions** button to add a condition that uses the internal common field called **Status** and while this has a status 'open' the email will be sent and click on OK. We will set this 'open status' in a later exercise under Form Action rules.

4. Add two **Send email rules** to the **Submit button** in the **Maintenance form**, by copying the **Email Requester** and **Email Inspector rules** from the **Request form**. Click on the **Duplicate button** beside the Email Request rule on the Submit button and check **Copy to another field** then drill down to the **Maintenance form** and **Submit** button.

5. For the **Email Requester** rule edit the following:

- Change the subject to 'New Maintenance Completed: [project]
- Change the body to say 'Your requested Maintenance has been completed for' and ensure Project, Address and Inspector details are added as expressions as follows:

To:	Field:Requester
CC:	
BCC:	
Subject:	New Maintenance Completed: [project]

Body:

Hi [requester],

Your requested Maintenance has been completed for:

Project: [project]

Address: [address]

Inspector: [Inspector]

Best regards
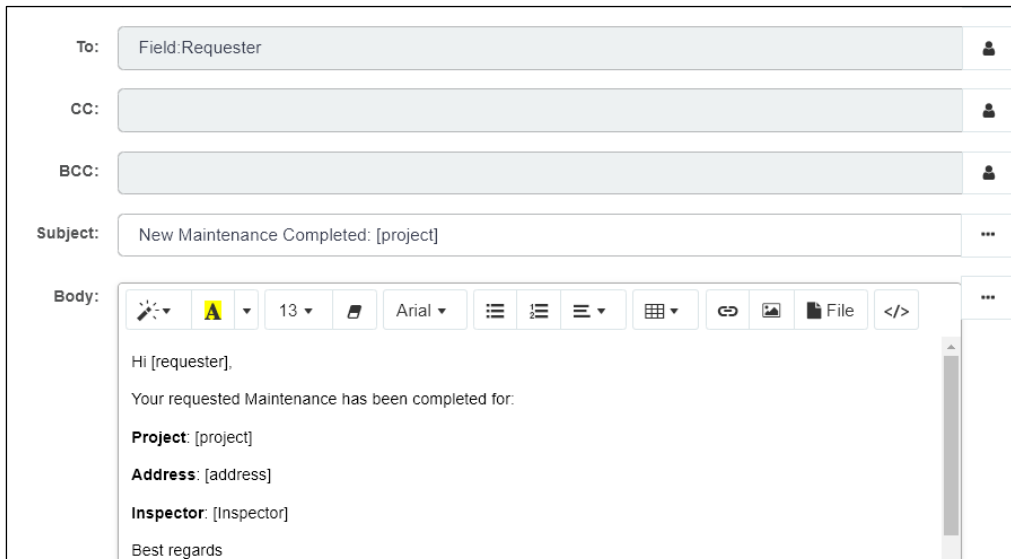
- Click on the **File** button in the body of the email to add an attachment, in this case a File field called **Generated report** and **Insert attachment**. This will add the details of the maintenance form as a PDF using the template created in the steps under 'Kianda Add-in'.

Attach file to email

File field

Template > Generated Report ✕

☐ Insert as link?

Insert attachment
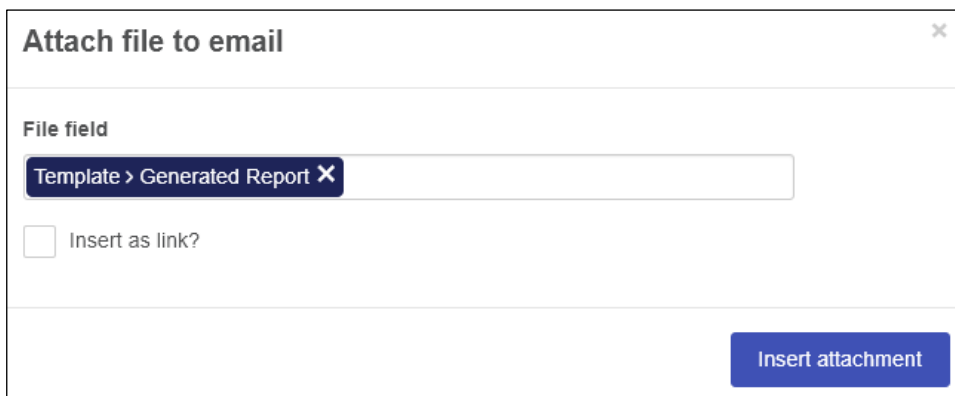
6. For the **Email Inspector** email, edit the following:
   - Change the subject to 'New Maintenance Completed: [project]
   - Change the body to say 'Thank you for completing Maintenance for:' and add in Project and Address details using expressions
   - Attach the Generated report using the step 5 instructions above so the effect is as follows:
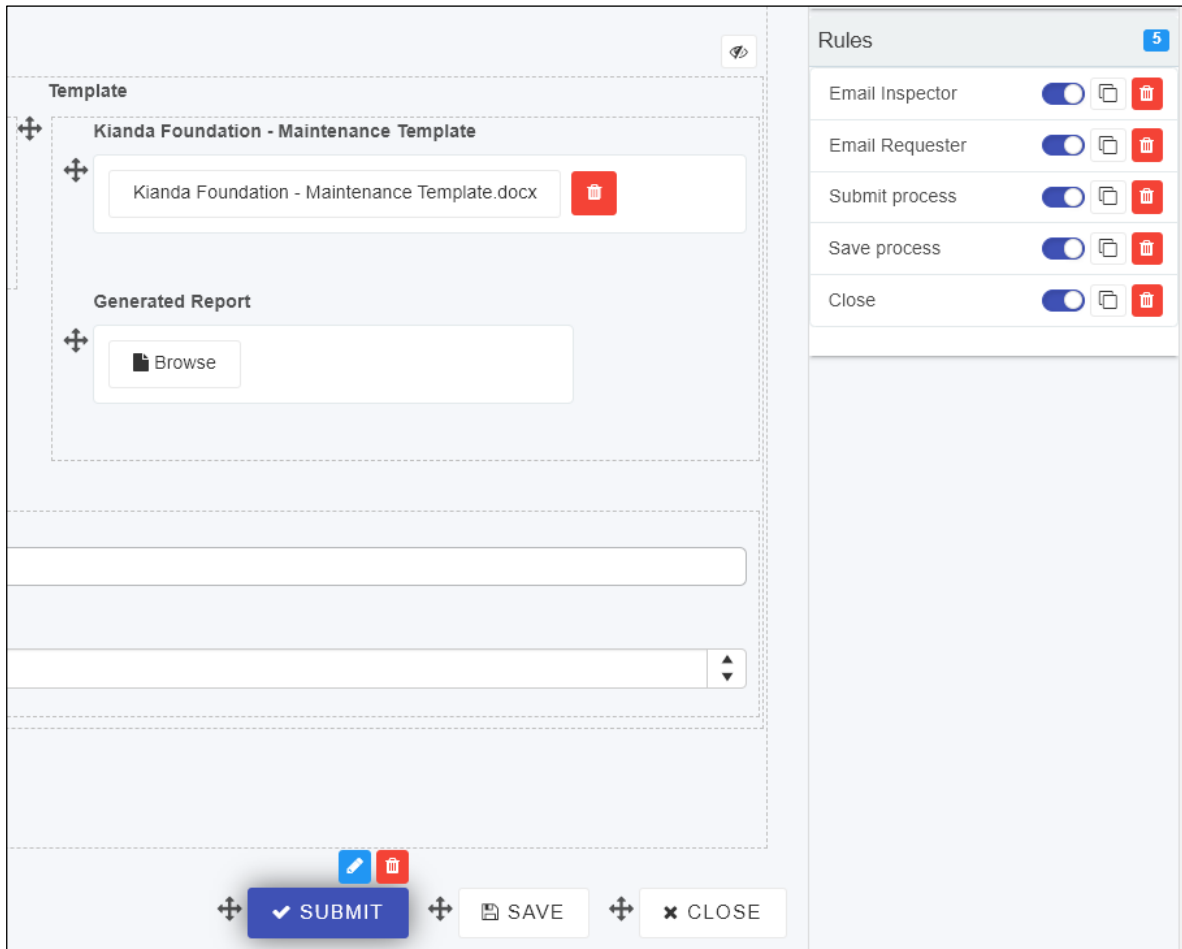
7. Save your work.

Rule order

1. Ensure that any rules like **Send email rules**, created on **Submit buttons** are moved <u>above</u> the auto-added **Submit, Save** and **Close rules** that are necessary for form submission and form shut-down post submission. For more information on conditions, see Section 4, Lesson 4 Rule order. In the **Maintenance form**, click on the Submit button and drag any **Send email** rules above the **Submit rule** so the effect is as follows:

2. Repeat the steps above for the **Request form**. For other rules that will be added in the next sections, keep this concept of Rule order in mind.

3. Save your work.

Workflow rules

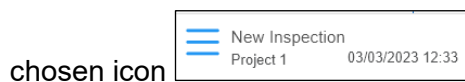1. Add an **Assign form rule** to the **Submit** button of the **Request form**. For more information on Workflow rules, see Section 4, Lesson 5 Workflow rules.

2. In the Edit rule dialog box give the rule a title 'Assign Maintenance form to Inspector'.

3. Under **Action**, and **Select form**, select the **Maintenance form** and under 'Assign to' choose 'Defined in a user field' choosing the **Inspector user picker** field, so that any user chosen in this user picker field will have the Maintenance form assigned to them.

4. Click on OK to save the details, then move the rule to the top of the rules list for the Submit button and save your work.

5. Add another workflow rule, called **Schedule a rule** rule to the **Submit** button of the **Request form**.

6. In the Edit rule dialog box give the rule a title 'Schedule REMINDER'.

7. Under **Action**, and **Select the field or rule to trigger on schedule**, select the **Reminder button** in the **Request** form, and choose 'Daily' for the schedule, and a time of choice. Check the 'Make task unique' box as follows:
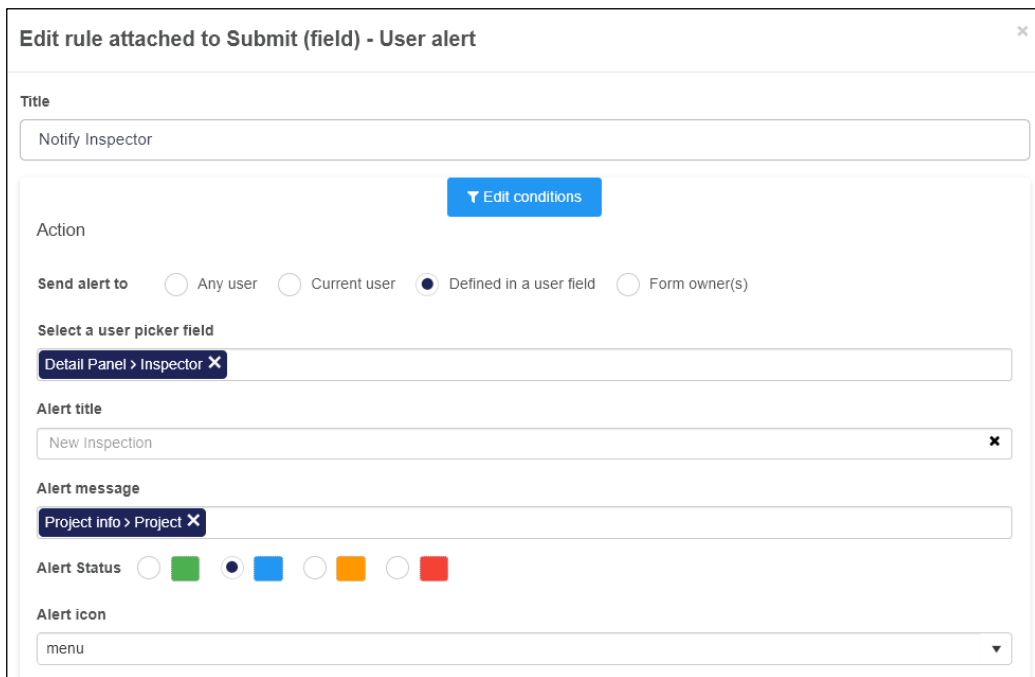
8. Click on OK to save the details and save your work. The result is of adding the Schedule a rule rule is that when the Request form is submitted, any rules attached to the Reminder button will be triggered, which in this case is a reminder email to the Inspector to perform the maintenance check.

Communication rules

1. Add a **User alert rule** to the **Submit** button of the **Request form**. For more information on Communication rules, see Section 4, Lesson 6 Communication rules.
2. In the Edit rule dialog box give the rule a title 'Notify Inspector'.
3. Under **Action**, and **Send alert to**, choose 'Defined in a user field' choosing the **Inspector user picker** field, so that any user chosen in this user picker field will get the alert.
4. Under **Alert message** add in the Project field and choose a colour and an icon for the alert as follows:

5. Click on OK to save the details, then move the rule to the top of the rules list for the Submit button and save your work. The result is that when a form is submitted, the user in the Inspector user picker field will receive an alert on the notifications button and clicking on the Al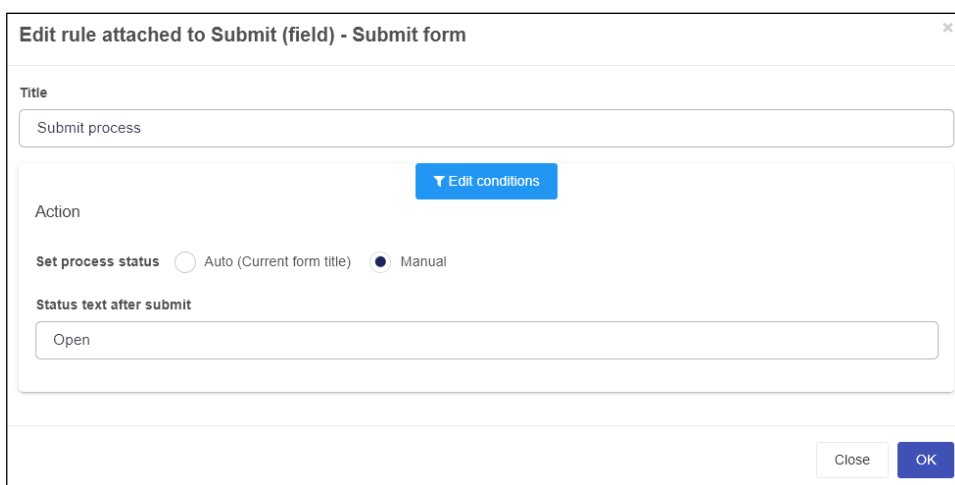ert will yield further information including showing the chosen icon and clicking on this will bring the user to the form.
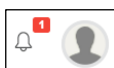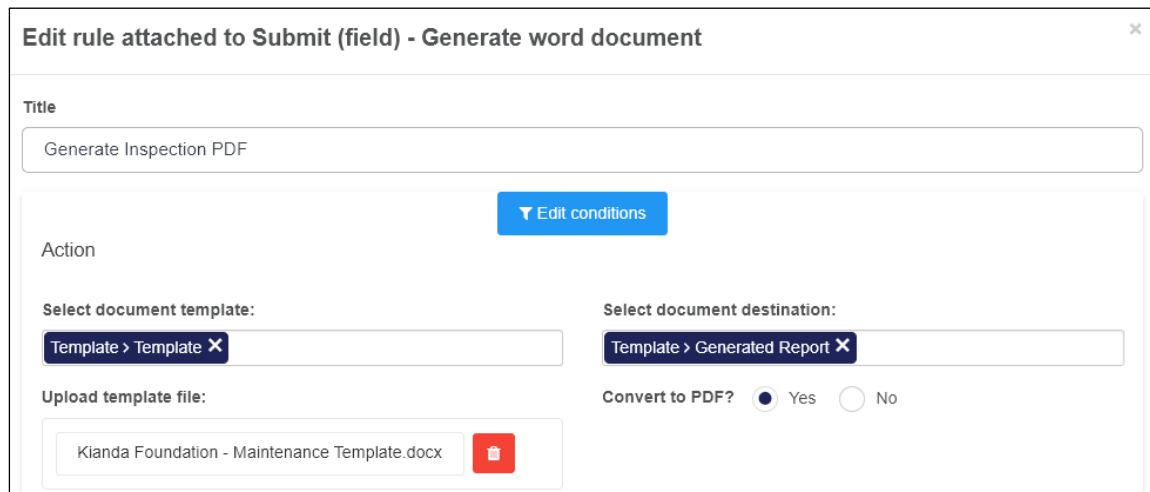
File management rules

1. Add a **Generate word document rule** to the **Submit** button of the **Maintenance form**. For more information on File management rules, see Section 4, Lesson 9 [File management.](#)

2. In the Edit rule dialog box give the rule a title 'Generate Inspection PDF'.

3. Under **Action**, and **Select document template**, choose the Template field (within Template panel) which is going to hold a file that is the source of the document generation and under **Select document destination** choose Generated Report field (within Template panel) which will be the output of the report.

4. Under **Upload template file** choose 'Kianda Foundation – Maintenance template.docx' and beside **Convert to PDF** choose **Yes** so the effect is as follows:

5. Click on OK to save the details, then move the rule to the top of the rules list for the Submit button. It is important that this rule is <u>before</u> the **Send email rules** since the report must be generated first, so it can then be attached to the emails.

6. Save your work.

Form actions rules

1. Edit the **Submit process rule** on the **Submit** button of the **Request form**. For more information on Form action rules, see Section 4, Lesson 12 Form actions.

2. Set an internal status value for a process instance of this process design, so that when the **Submit** button is clicked, a 'common field' called Status will hold a value called **Open**. When the Maintenance form has been submitted and the process complete, then this internal status value will change to 'completed'.

3. Under **Action**, beside **Set process status**, choose 'Manual' and under **Status text after submit** put in status 'Open' as follows:

4. Click on OK to save the details and save your work.

Kianda AI rules

1. Add a **Text analysis rule** to the **Submit** button of the **Maintenance form**. For more information on Kianda AI rules, see Section 4, Lesson 14 Kianda AI rules.

2. In the Edit rule dialog box give the rule a title 'Comment analysis'.

3. Under **Action**, and **Input field containing text for analysis**, choose the Comments textbox field within the Maintenance form, which is going to hold comments input by users which will be analysed by the Kianda AI rule for sentiment.

4. Under **Text analysis** function, choose **Sentiment analysis** and choose the appropriate **Text input language**.
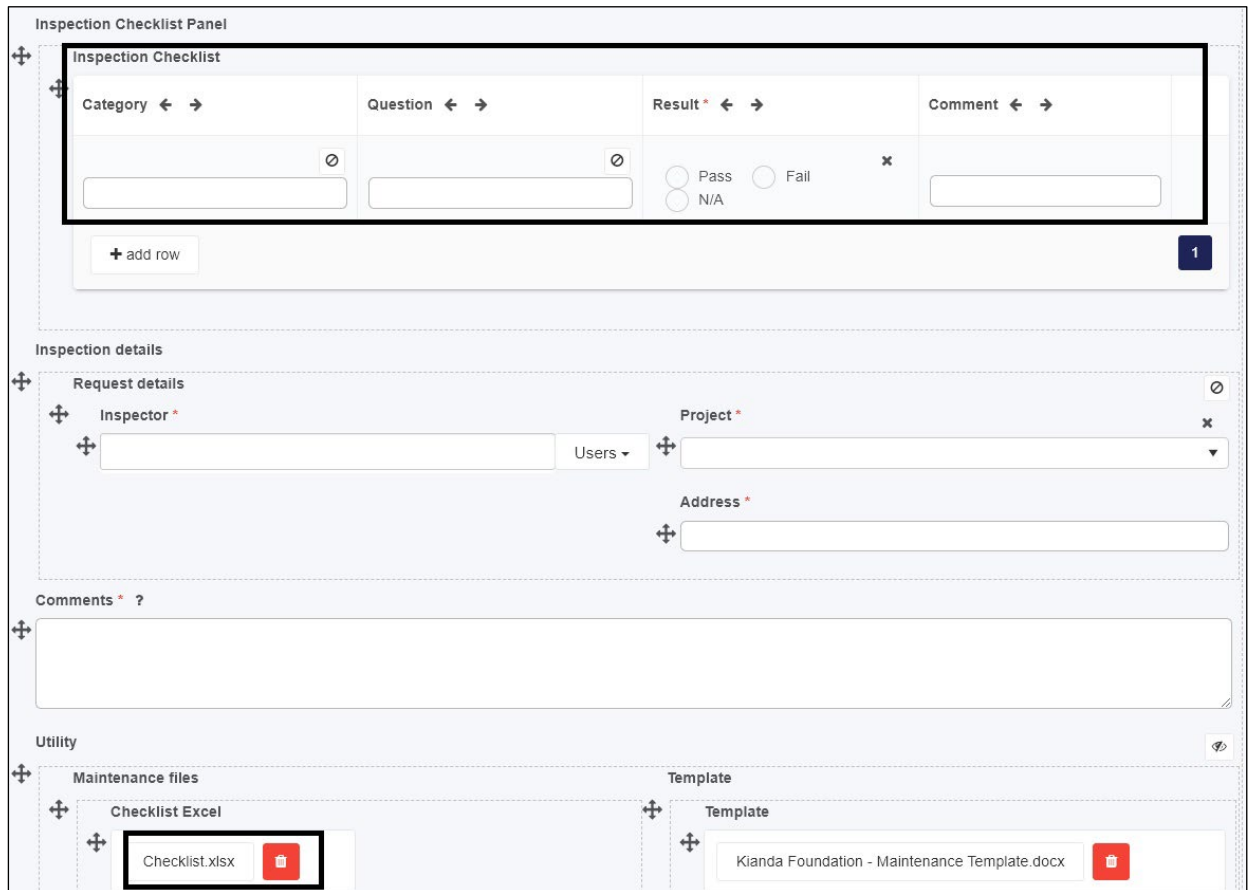
5. Under **Field to store computed sentiment (Negative or Positive)** add the **Sentiment field** within the Analysis panel in the Maintenance field, and under **Field to store the sentiment score** add the Score field from the same panel as follows:

6. Click on OK to save the details, then move the rule to the top of the rules list for the Submit button. Save your work.
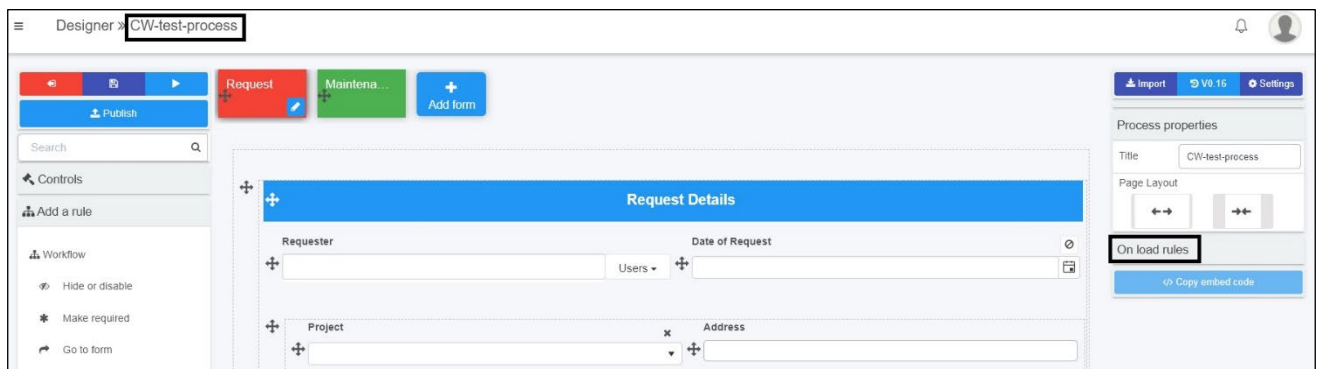
Process onload rules

1. At this point all the rules have been added to form buttons for this particular process. These rules will send automatic emails to users that submit request forms, to chosen Inspectors, schedule reminder emails if the maintenance check is not performed, as well as generating reports from captured data which are added to automatic emails once the maintenance check is performed. There is one missing piece which is to populate the maintenance checklist with the Checklist file in the Utility panel in the Maintenance form.
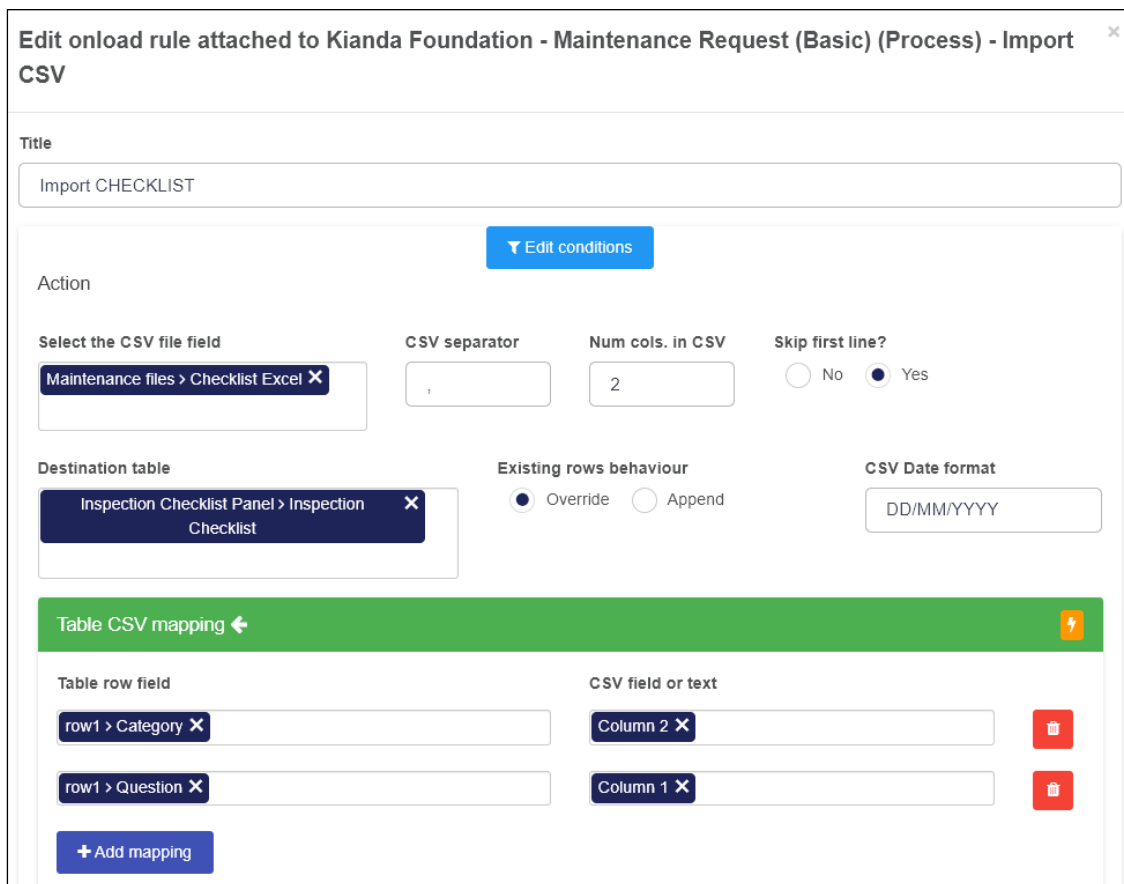
To do this we will use process level 'onload rules' so that the first thing that happens when a process instance is initiated is that the Inspection checklist is created from the Checklist form. This method provides a dynamic way so that if requirements change, a new file can be uploaded or details fetched from SharePoint or other datasources so that the form will be updated with the new details.

2. Click on the process name beside 'Designer' to see the **On load rules** area in the right-hand pane.

3. Click on **Add a rule** and choose the **Tables** rule, **Import CSV**. For more information on Table rules see Section 4, Lesson 10 Table rules.

4. In the Edit rule dialog box give the rule a title 'Import CHECKLIST'.

5. Under **Action**, and **Select the CSV file field**, choose the Checklist Excel file within the Maintenance files panel in the maintenance form.

6. Change **Num cols. in CSV** from default value of '5' to '2', and choose **Yes** for **Skip first line** since the first line of the file are headers for the columns.

7. Choose the **Destination table** as the **Inspection Checklist** and set the CSV Date format as DD/MM/YYYY.

8. Then drill down to map details from the file into the **Category** and **Question** columns, using **Column 2** and **Column 1** from the CSV file as follows:

9. Click on OK to save the details.

10. Finally go to the Process Settings ⚙ Settings and change **On load rules execution mode** from 'Always' to 'When open new' as shown below so that the file import only happens when the process instance is created, rather than when opened:

11. Click on **Save** to save your process.

12. Now that all the rules have been added test out your process using the Previewer. Your process may look something like this:

In this example Barbara receives an email confirming the submission of her request, while Mike receives an email requesting him to perform the maintenance check with a link to the maintenance form which he fills out and submits:

Electrical	Electrical 2	● Pass ○ Fail ○ N/A		🗑
Electrical	Electrical 3	● Pass ○ Fail ○ N/A		🗑
Electrical	Electrical 4	● Pass ○ Fail ○ N/A		🗑
Electrical	Electrical 5	● Pass ○ Fail ○ N/A		🗑
Electrical	Electrical 6	● Pass ○ Fail ○ N/A		🗑
Electrical	Electrical 7	● Pass ○ Fail ○ N/A		🗑
Electrical	Electrical 8	● Pass ○ Fail ○ N/A		🗑
Building Regulations	Building Regulations 1	○ Pass ○ Fail ◉ N/A		🗑
Building Regulations	Building Regulations 2	● Pass ○ Fail ○ N/A		🗑

+ add row   [1] 2 3

Inspection details
Request details
Inspector   Project
Mike Balcoome   Project 1

Address
10 Main street

Comments * ?

Everything is in order in this check.

Mike Balcoome

A copy of the full process design is available here for your reference.

KF-maintenance-re
quest-basic.kianda

Introduction to dashboards

1. Create a dashboard for the process and add in a list widget. For more information on getting started with dashboards, see Section 5, Lesson 2 Introduction to dashboards.

2. Go to the home page of your workspace and click on the **Add new page** button to create a new dashboard page. Give the page a title related to your process, add an icon and put the dashboard into a group called 'Training'. Choose to Enable favourites if desired.

3. In the next screen click on **List widget** ⊞ List to add a widget to this dashboard. Give the list a name such as 'All Records' and then in the Edit list widget dialog box, connect the widget to your process by going to **Business process and** choosing the process name from the dropdown list. Under the **List view fields** in the right-hand pane, choose **ID**, **Status** and Design fields like **Requester** to show in the widget details as shown below.

4. You can rearrange the order of how field values display by dragging items by the drag handle button under **List fields**. Click on OK when you are finished configuring the widget.

5. Save your work by clicking on the **Save button** the widget remains in the dashboard.

ID	Requester	Inspector	Status	Project	Urgent	
kf-maintenance-request-basic-12	Barbara Rikarson	Mike Balcoome	completed	Project 1	No	🗑
kf-maintenance-request-basic-11	Barbara Rikarson	Caitriona Whelan	open	Project 1	No	🗑
kf-maintenance-request-basic-10	Bartek Kianda	Barbara Rikarson	open	Project 1	No	🗑

Publish a process

1. Make a change to the process so that when a form is submitted, you are returned to the dashboard created in the previous section. To do this go to the **Request form** in Kianda Designer, click on the **Submit** button and the **Close form** rule. Under **Action**, choose **Return to a dashboard** and then select the name of your dashboard under **Please choose a dashboard** as follows:

Edit rule attached to Submit (field) - Close form   ✕

Title

Close

▼ Edit conditions

Action

On form close navigate to ◯ Auto ● Return to a dashboard ◯ Return to URL ◯ Go to a process

Please choose a dashboard

Maintenance Records (Basic)

Query string parameters *Example: param1=1&param2=2*

Close | OK

---

2. Click on OK. Repeat the same steps for the **Close form** rule on the **Submit** button of the **Maintenance form** and click on OK when done.

3. Save your process.

4. Publish your process so that all previous instances of the process design if edited, will return the user to the new dashboard. For more information on Publishing a process, see Section 5, Lesson 3 Publish a process.

5. Click on the **Publish** button ⬆ Publish and add a **Comment**, and click on **Yes** for **Bulk update process instances** and **Yes** for **Update all instances**.

Bulk update process instances?
- ● Yes   ○ No

Trigger field rules after design update?
- ○ Yes   ● No

Update all instances?
- ● Yes   ○ No

6. Click on **OK** and the design is applied to all previous instances retrospectively as well as new instances going forward. Note the version of the process will change to V1.0.

Modify dashboards

1. Make further changes to the dashboard for your process by adding in more widgets. For more information on modifying dashboards, see Section 5, Lesson 4 Modify dashboards.

2. Click on your dashboard and click on the **Edit** button   to modify the dashboard.

3. Click on **Rich Text** to add in a Rich text widget. Give the widget a title such as 'Information' and click on OK. Then add content to the dashboard, such as text and images, similar to the following:

Welcome to the Maintenance Dashboard
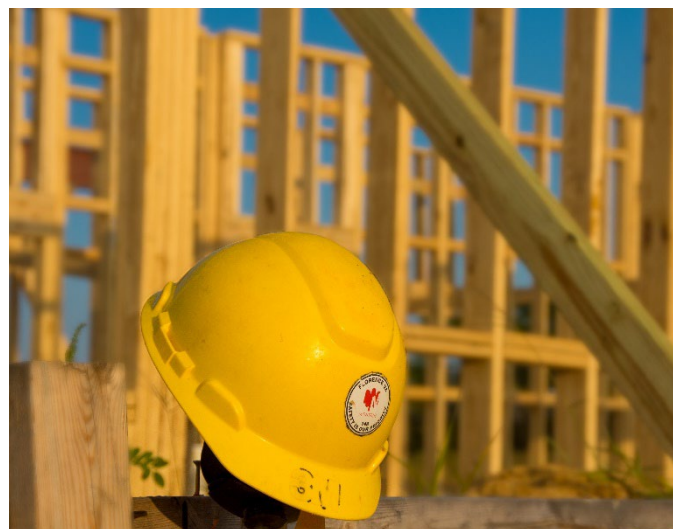
Here you can view all record from the maintenance request process. The dashboard allows you to view number of records, closed and urgent records.

4. Click on OK when you are finished configuring the widget.

5. Click on **Tile** to add in a Tile widget. Give the widget a title such as 'Total no. Of Maintenance Requests' and click on OK. Then in the **Edit Tile dialog box** connect the widget to your process by going to **Business process and** choosing the process name from the dropdown list. Choose from **Count** beside **Tile expression** and choose an icon. Choose **Yes** for **Connect to List Widget** and select the List widget name from the dropdown list under **List widget** as follows:

6. Save the dashboard. The total number of Maintenance requests appears in a tile, similar to that shown below:
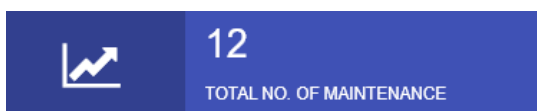
7. Create two more tile widgets, one to show the total number of closed requests and one to show the total number of open requests. To do this add a condition when configuring the tile widget by clicking on the **Condition** button in the middle of the Edit Tile dialog box.

8. In each case, add a condition where **Status** must **Equal** a value **Completed** or **Open** as shown below:

9. For the **Open requests tile** you can further modify it to add in the Urgency field so the tile shows the total number of Open Urgent requests:
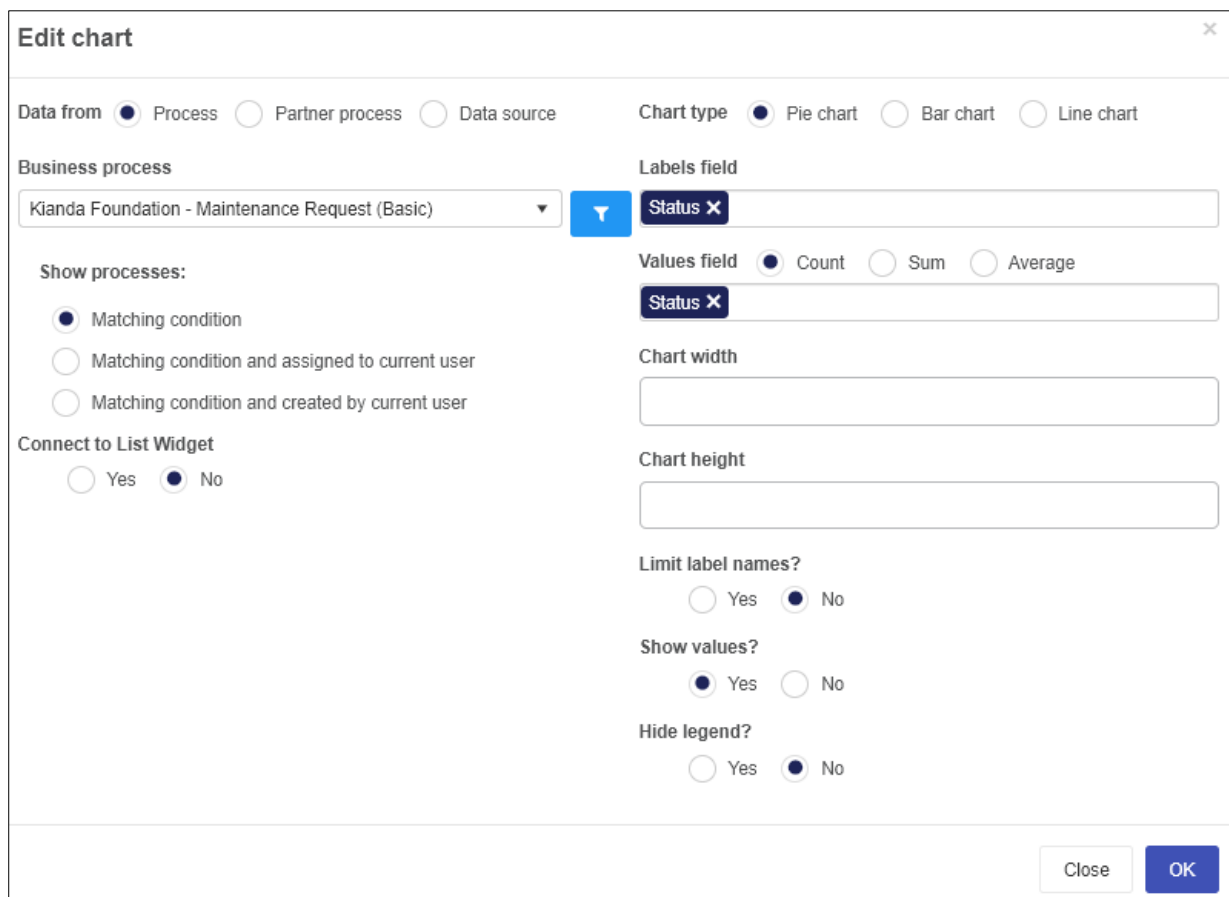
10. Click on **Chart** to add in a chart widget. Give the chart a name such as 'Closed/Open' and adjust to layout to 2 columns width as shown below.

11. Click on OK, and in the Edit chart dialog box choose **Pie Chart** from the **Chart type** list. Under **Labels field** and **Value field** choose the common field 'Status' to show the values. This widget will show the same details as the tile created in step 5, just showing the information in another format.

12. Create a second chart, this time a **bar chart** showing **Project** information, similar to that shown below:
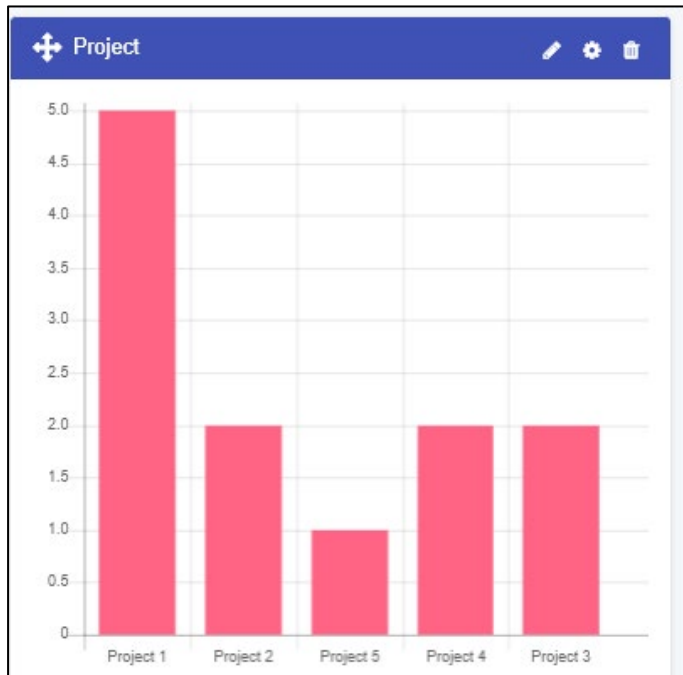
13. Lastly click on **Link** to create a Link widget to allow a new process instance to be created from the dashboard.

14. Call the widget 'Start Maintenance Request'.

15. In the Edit button links dialog box, click on the Edit/Pen icon beside Start New Process to create a new link, giving the Link text the title 'Start Maintenance Request' and choose the name of the process from the dropdown list under **Target process** as follows:

16. Rearrange the widgets and resize accordingly so that your page resembles the following or as desired:

17. Save your work.

    Congratulations you have made your first process and linked it to a dashboard to observe data captured and gain business insights going forward!

    You are welcome to export your process and send to academy@kianda.com where a member of our training team will validate your work.