Process Director Documentation

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Documentation Overview

Click this link for a PDF version of this document: Process Director Documentation (PDF).

Process Director's online documentation covers every technical aspect of the product. The documentation you can access here is primarily reference documentation, and doesn't contain training documentation for the product. BP Logix has developed several training courses, from simple to advanced operations, and they are available at our Online Training Portal. Access to this portal can be obtained through your BP Logix sales representative, who will provide you with a login code that enables you to create your own learner's account via a self sign-up page. Once you have a code, you can create your own account and begin taking the Process Director Training immediately.

Process Director's documentation is updated on a continuous basis, so the online version of the documentation will always be up-to-date with the product. In addition, release notes for each version of the product can be viewed on the BP Logix Support site.

You may notice that some features described in the documentation reference near-future versions of Process Director that have not yet been released, as part of our ongoing attempts to ensure the documentation is fully current on the release date of new features.

All of the documentation is also available as downloadable PDF files, which can be accessed on the home page for each section of the documentation, but, of course, the PDF documentation will only be current as of the date the PDF file was downloaded.

The documentation is organized into different sections that are targeted at different classes of user.

There are additional topics that may help you use the documentation:

- Navigating Through the Documentation
- Searching the Documentation
- Formatting Conventions
- AI Chat

- Documentation Feedback
- Documentation Change Log

Organization

The documentation is organized in several different sections.

Implementation

The Implementation area is primarily for persons who will use Process Director to build low-code/no-code applications with the product. At BP Logix, we call such persons "implementers". Implementers will find four different documentation sections in this area.

Implementation: This document covers all of the Process Director objects, such as Forms, Process Timelines, the User Interface, etc., and lists all of the settings that can be configured for every object. In addition, the documentation covers application administration tasks like setting permissions on objects, best practices, and other useful information for implementers.

System Variables: Access to much of the data stored in Process Director can be accessed and displayed to users with System Variables. The System Variables guide lists every system variable available in Process Director, the modifiers that they use, and the syntax for using them.

Custom Tasks: A variety of common operations that may be used in many different applications are included with Process Director as Custom Tasks. For instance, you may need to convert documents to PDF, or copy data between forms. The Custom Tasks guide documents all the Custom Tasks and lists every setting that can be configured for them.

Advanced Reporting Component: In addition to the simple reporting that can be created through the use of Knowledge Views, Process Director comes with a full-featured report builder for creating complex reports and infographics. This section of the documentation describes, in detail, the capabilities and settings of the Advanced Reporting Component.

Administration

This area is designed for persons who will perform system administration on Process Director installations, and describes all of the administrative settings and actions available for administrative use. This area contains three sections.

System Administration: This section details all of the administrative sections of the product, all of which are accessible through the administrative UI built into the product. Cloud customers should note, however, that some settings for their installation may be missing, and are managed by BP Logix, though on-premise customers have access to the full range of administrative settings.

Installation: This section contains a step-by-step guide for installing the product for those customers who will be using on-premise installations of Process Director. For Cloud customers, BP Logix performs the installation tasks, so this section won't be relevant to Cloud customers.

Scheduler Module: This documentation covers the use of Process Director's Scheduler module. This section is also primarily useful only for administrators of on-premise installations.

Development

This area is useful for administrators and software developers. It contains two sections.

Database Reference: This document provides the schema and relationships contained in the Process Director internal database.

Development/SDK: This documentation focuses on two main topics. For administrators, the Custom Variables topics describe all of the system-wide settings that can be implemented in Process Director by editing the Custom Variables file that is included with the product. On-Premise and appropriately-licensed Cloud installation administrators can make changes to the custom variables file, while BP Logix can make any required changes for other Cloud customers upon request. For Developers, the SDK topics describe all of the Properties, Methods, and Events that are available for custom scripting and other SDK operations. While Process Director is primarily a no-code/low-code platform, the SDK enables software developers to extend the functionality of the product. Web Services that are available from within the product are included in the SDK topics, as well.

Documentation Formatting Note

Text and Code Formatting Conventions

To highlight terms and concepts that have special relevance, this documentation implements several formatting conventions to make key words and terms more noticeable.

- Control Label: This format will identify the text labels or properties for Process Director objects, or the names of dialog boxes.
  Example: The Name text box.
- UI Element: This format will identify user interface elements such as buttons, tabs, or other UI objects used to perform interface operations.
  Example: The Submit button.
- Formal Control Name: This format will identify named Process Director controls.
  Example: A Section End control.
- Process Director Object: This format will identify named instances of Process Director Folders, Forms, Process Timelines, Knowledge Views, etc.
  Example: The Travel Expense Approval Process Timeline.
- **Key Terms**: This format will identify key terms and concepts introduced into the text of the document, and which are important to learn.
  Example: A **Case** is group of processes, transactions, or responses that define a complex activity.
- `Code`: This format will identify code samples, system variables, formulas, or other fixed programmatic syntax.
  Example: Type the following formula: `AirFare + Lodging`.
- `Code Option`: A section of a code sample to denote placeholder values that must be replaced by the user manually at design time.
  Example: `{CURR_USER, format=FormatType}`
- `Code Comment`: A section of a code sample that is used for text comments, rather than runnable code.
  Example: `// This is a comment.`
- `Code Variable`: A programming object whose value is usually determined from a command written in code.
  Example: `var formControls = BaseCurrentForm.FormControls;`

In addition to the above, extended samples of program code are presented in a special format to set them off from the rest of the text, as demonstrated below:

```
// Called after database initialized
public override void SetSystemVars(BPLo-
gix.WorkflowDirector.SDK.bp bp)
{
    // Before we make SDK calls that access the database,
    // ensure DB has been opened
    if (bp.DBOpenComplete)
    {
        // Place custom code here
    }
}
```

Important text or warnings are presented in a special callout box for special attention:

This is an Important item.

Notes of general interest are also presented in special callout boxes:

This is a note.

Hopefully, the use of these formatting conventions will make it easier for you to determine the various types of objects to which the text refers.

Icons

Some universal icons are used in the documentation. They are listed below:

ICON	NAME	DESCRIPTION
#	Link	A hyperlink to the specific URL and named anchor of a topic, heading, or other item.
+	Dropdown Closed	An icon that, when clicked, will expand dropdown text in a topic.
−	Dropdown Open	An icon that, when clicked, will close the expanded dropdown text in a topic.

Finally, some topic headers within each online document may display a link symbol (#) when you mouse over the header. Clicking the link will navigate to that specific section of the document, which can then be bookmarked in your browser.

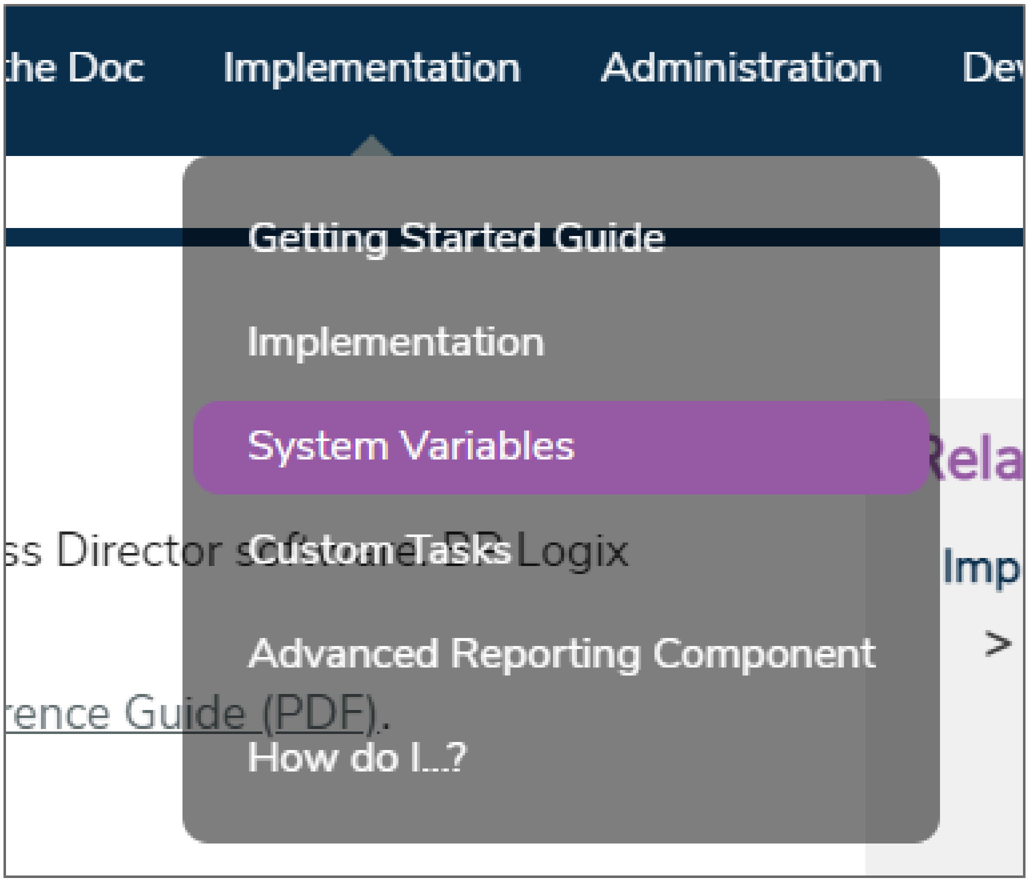
Other Conventions

URLs displayed in sample will, unless used for commands or URLs used on the local host machine, use the "HTTPS" prefix by default, as modern practice has evolved to use the encryption layer to access URLs, instead of the plain-text method (HTTP) of accessing URLs.

Navigating Through the Documentation

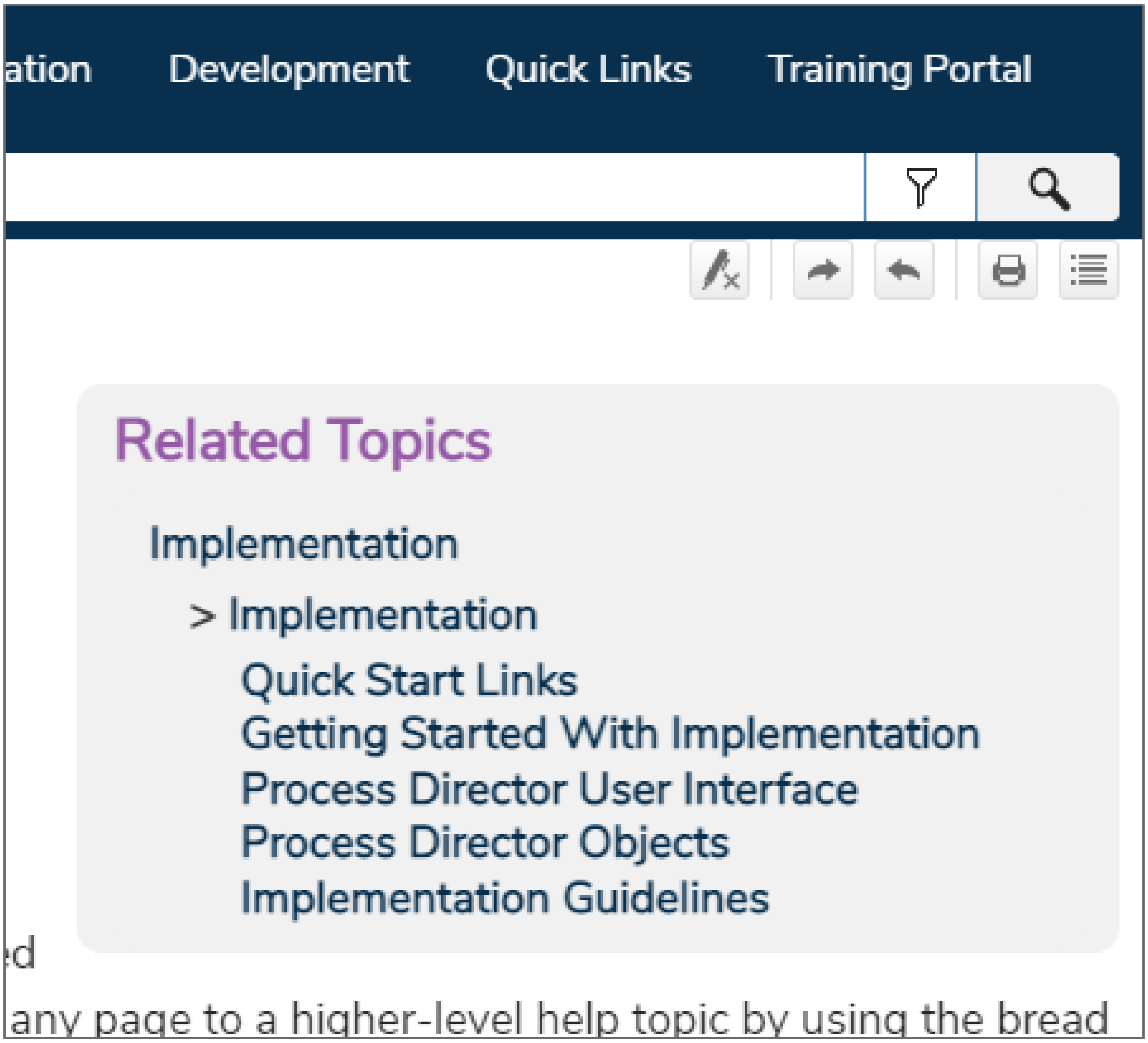
Navigating through the documentation can be performed by using the dropdown menu bar that appears at the top of each page.

Each item in the navigation menu will open to display the appropriate section when you place the mouse over a menu item.

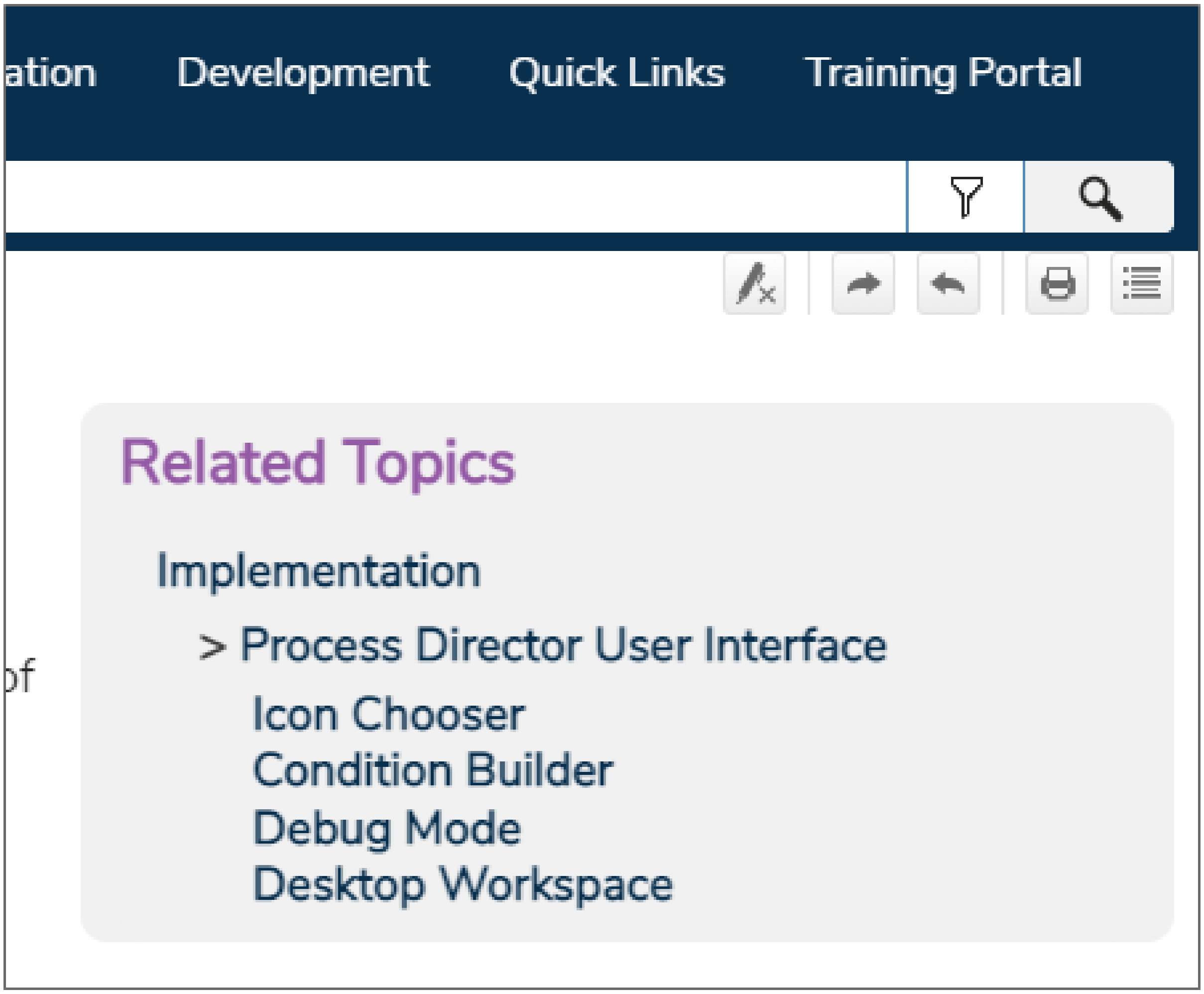


Clicking on any of the sections listed in the dropdown menu will automatically open that section of the documentation.

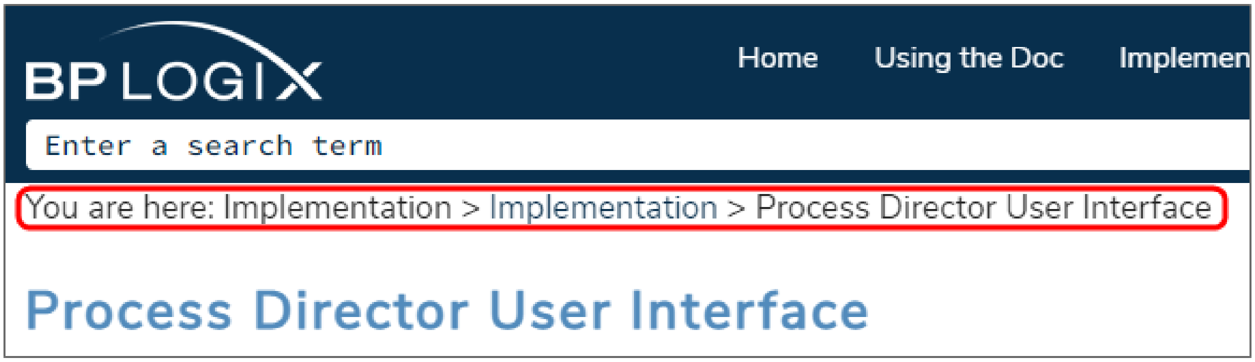
Once you've navigated to a section of the documentation, a context-sensitive Table of Contents for that section, labeled "Related Topics", will appear at the right top corner of the page. For instance, if we navigate to the Implementation section, the table of contents for the main topics will be displayed.



Since this is a context-sensitive Table of Contents, if we click on the topic labeled, Process Director User Interface, we'll see a different table of contents for the items related to that specific topic.

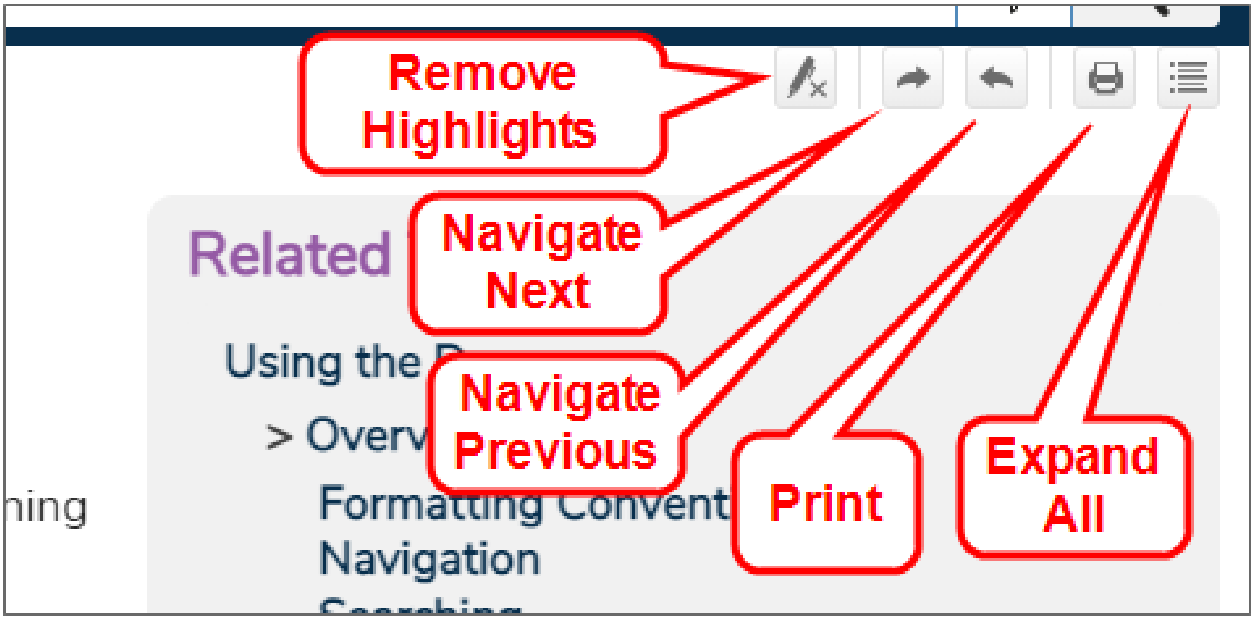


Using this context-sensitive Table of Contents, you can continue to drill down through the related topics. You can use the BACK button on your browser to return to the previous, higher-level pages. Additionally, as you navigate through the pages, a "breadcrumb" list will be displayed in the top left portion of the page.



You can click on any of the items in the breadcrumbs list to navigate directly to that item, without having to use the Browser's BACK button to go back one page at a time.

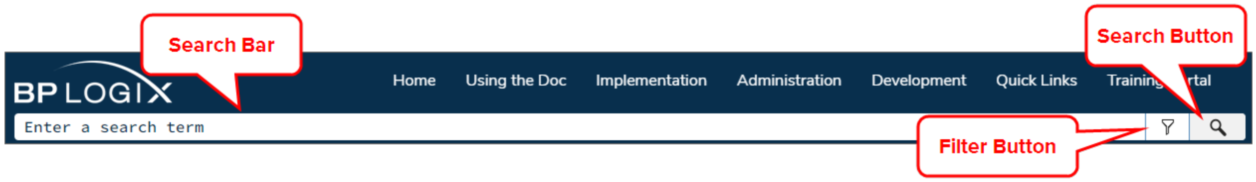
Finally, at the top of each page there is a series of Icons in the upper right corner:



- **Remove Highlights:** Pages returned via the search feature will automatically be displayed with the search terms you entered highlighted in various colors in the page text. Clicking this icon will turn those highlighted colors off.
- **Navigate Next:** Shows the next topic in the current Table of Contents.
- **Navigate Previous:** Shows the previous topic in the current Table of Contents.
- **Print:** Prints the current page.
- **Expand All:** On pages with hidden text, such as the hidden dropdown text on many pages, clicking this icon will expand all hidden text to make all text on the page visible.

Searching the Documentation

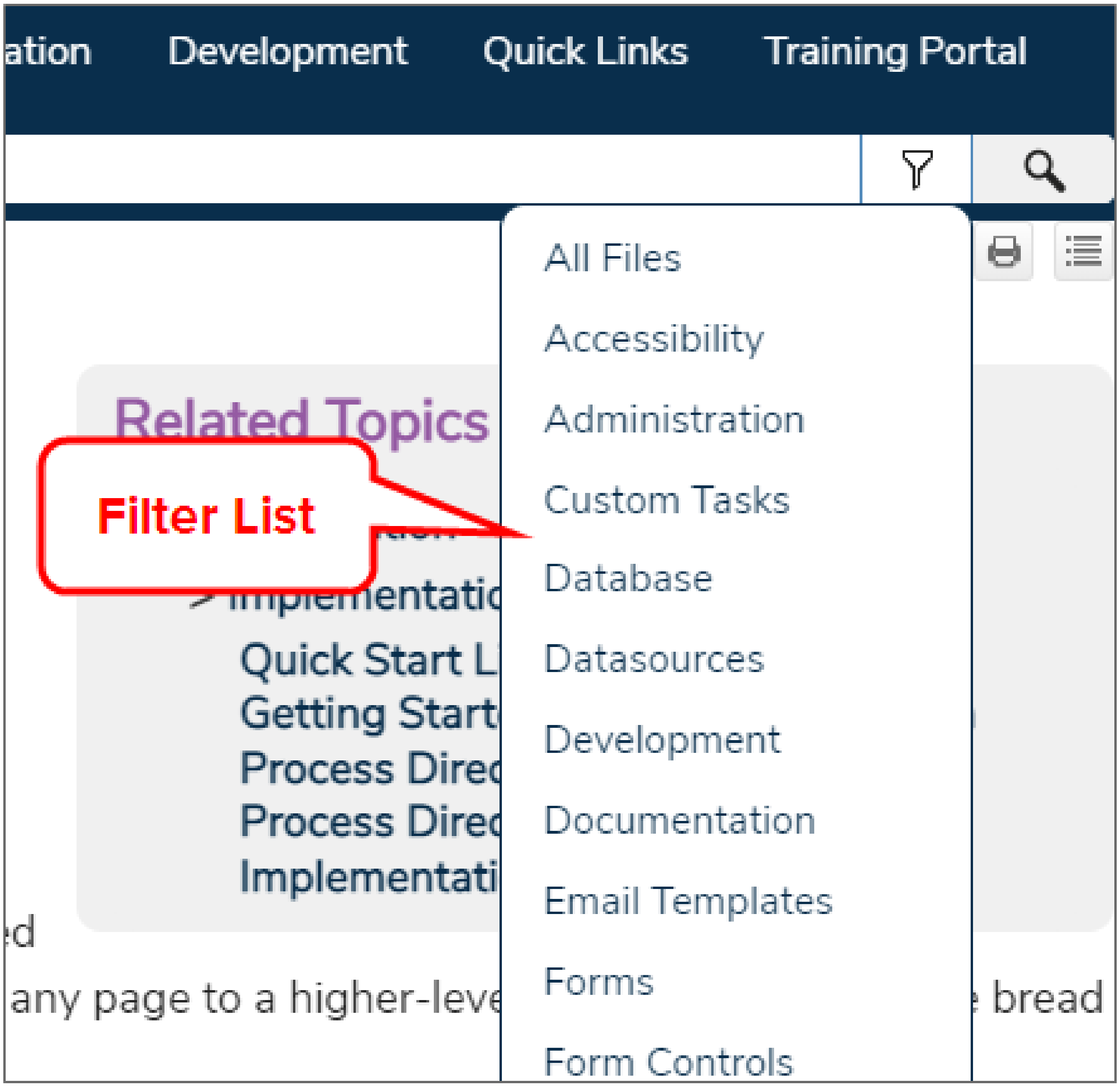
At the top of every page, a search bar is displayed.



You can enter a term in the search bar and then click the Search button to return the results of your search term. To return more specific search results, you can apply a filter to the search results, or you can use search operators to change how topics are evaluated for return.

Search Filters

You can use the Filter button to select a specific topic area in which to perform the search, and return results only from that topic area when you click the Search button. The Filter button presents a dropdown list of filters, each of which represents a specific topic type.



You can click on any filter to select it. You can select a filter from the list before or after entering and retrieving search results. Similarly, you can remove the filter by selecting All Files at any time. In all cases, you'll only be shown search results that match the topic filter you've chosen. The filter you select will remain active until you change or disable it. If you change the filter by selecting a different option from the dropdown menu, the search results will automatically switch to show you the results that match the new filter. Similarly, you can disable the filter and see all search results by selecting All Files from the filter dropdown.

Some search filters will show only results for specific process director objects, others will return results from an entire Guidebook, such as the Implementer's or System Administrator's Guide, While others may show results from more than one guidebook. The filters and the type information they return are displayed in the table below.

Filter	Documentation Returned
Accessibility	Topics specifically related to Web Accessibility guidelines.
Administration	All topics in the System Administrator's Guide, plus specific admin-related topics from elsewhere.
Custom Tasks	All topics in the Custom Tasks Guide.
Database	Any topic in the Database Guide, plus specific data-related topics from elsewhere.
Datasources	Topics specifically relating to creating and configuring Datasource objects.
Development	All topics from the Developer's or Database Guides.
Documentation	All topics from the Documentation Guide.
Email Templates	Topics specifically relating to creating and configuring Email Templates.
Forms	Topics specifically relating to creating and configuring Form objects.
Form Controls	Topics specifically related to the use of Form Controls in the Online Form Designer.
Implementation	All topics in the Implementer's Guide.
Installation	All topics in the Installation Guide.
Knowledge Views	Topics specifically relating to creating and configuring Knowledge View objects.
Online Form Designer	Topics specifically relating to using the Online Form Designer.
Process Timelines	Topics specifically relating to creating and configuring Process Timeline objects.
System Variables	All topics in the System Variables Guide.
User Interface	Topics specifically relating to the Process Director User Interface.

Filter	Documentation Returned
Web Services	All topics related to using Web Services, Including the WSDL, REST Services, Business Values, and Web Service Custom Tasks.

Search Operators

Default Behavior

Unlike a Google search, where contextual relationships and verbiage may affect the search results you see, the documentation search engine will return **every topic** that contains text that matches your search term. You have several options for altering the results the search engine retrieves.

Use the **Filter** button ( ) in the search bar to filter the results to a specific category of topic.

When using more than one word to search for a specific phrase, try enclosing the search term in **Quotation Marks**, e.g., `"sequence number"`. Enclosing the term in quotes will search for the exact phrase you enter. Otherwise, the search engine will return all topics that match ***all*** of the search terms you use, e.g., a search for `sequence number` will return ***all*** topics that contain the words `sequence` and `number`.

Search Operators

You can also use search operators to change the parameters of your search, and override the default behavior of the search feature. None of the search operators are case-sensitive. The following search operators are available to you.

- **AND:** If you search for more than one word and don't enclose the search term in quotation marks, the AND operator is automatically assumed. The search engine will return every topic that contains all of the words. Though AND is the default operator, you can also type `AND`, the plus sign (`+`), or the ampersand (`&`) between search words.
- **OR:** If you search for more than one word and don't enclose the search term in quotation marks, you can type `OR`or the pipe symbol (`|`) and the search will expand to return all topics that contain ***any*** of the words in your search term.

- **NOT:** To exclude a term from the search, use the word `NOT`, the carat symbol (`^`), or the exclamation point (`!`) as an operator at the end of your search terms to search only for matching topics that *don't contain the term following the operator*. E.g. `form controls ^ variables` will return all topics that contain the words 'form' or 'controls' but don't contain the word 'variables'.
- **Parentheses:** You can use parentheses to search using multiple search operators, e.g., `(form | controls) (timeline ^ variables)`. This combination will return all topics that contain either the word "form" or the word "controls, as well as the word "timeline" but not the word "variables".

Browser-Related Search Issues

Because the documentation is routinely updated, and because many of the search files are cached on your local browser, you may notice that the search function returns no results. This is usually because your web browser (Chrome, Edge, Safari, etc.) is caching old, invalid versions of the search database files in your browser cache. You can usually resolve this issue by clearing your browser cache's stored files. Your browser will then retrieve the updated files to perform the search function correctly.

Using AI Chat

OpenAI, an AI research company, has a conversational AI model known as ChatGPT. This AI model can provide answer to conversational queries when properly trained. An additional service, CustomGPT, enables you to train ChatGPT on a specific set of documents, web pages, or other information, and uses ChatGPT to provide responses based on this custom set of documents.

At BP Logix, we've added the CustomGPT service to the Documentation web site. We hope this new service makes it easier to find answers to Process Director questions without having to perform a document search that might return many unwanted results, because traditional word searches can't understand the context of the term you're using to search.

In addition to the chatbox that can be accessed with the icon at the bottom of the page, a stand-alone chat page is available.

It's NOT a Search box!

Unlike a search feature, which returns topics that contain a specific word or set of words, the chatbot is a conversational system, and expects conversational queries, as if you were chatting with a person, instead of a search engine. If you enter a generic search term like, "email attachment" or "dropdown" the chatbot won't be able to respond effectively. Just as the search feature might return many topics that contain the word "dropdown", the chatbot will not be able to determine exactly what you're asking, and while it will probably provide ***some*** response, it probably won't be the correct one. There are simply too many sources that use the term for the chatbot to understand what you're asking.

For CustomGPT to work best, however, your query should be as specific as possible. For example: **How do I configure a report Datasource?** doesn't provide quite enough detail for CustomGPT to know whether you want to know about the Data Sources tab of a Report definition, or about the Datasource object in general, and may return a different answer than you want. Comparatively, **How do I configure the Data Sources tab of a report?** provides better detail about the specifics you're looking for in the answer, and thus a more detailed and relevant response.

On the other hand, a query like, **What custom variable sets the default database timeout?** or **Can you give me a code sample for nDBCommandTimeout?** will generally return the correct answer, or in the case of the latter query, the code sample in the documentation.

The chatbot does track the conversation thread, so, once you've asked a question, you can also reference the URL of a specific documentation topic, or tell the chatbot you'd like information from a training webinar, during the conversation to receive a more specific answer from a more specific source topic. The chatbot also learns over time, so having a conversation often helps nail down the information you're looking for in a way that the initial query might not. It's not nearly as fast as entering a simple search query, but it does improve the quality of the final result.

Finally, the chatbot's answer for questions it can't understand is a canned response. Generally, the answer is phrased like:

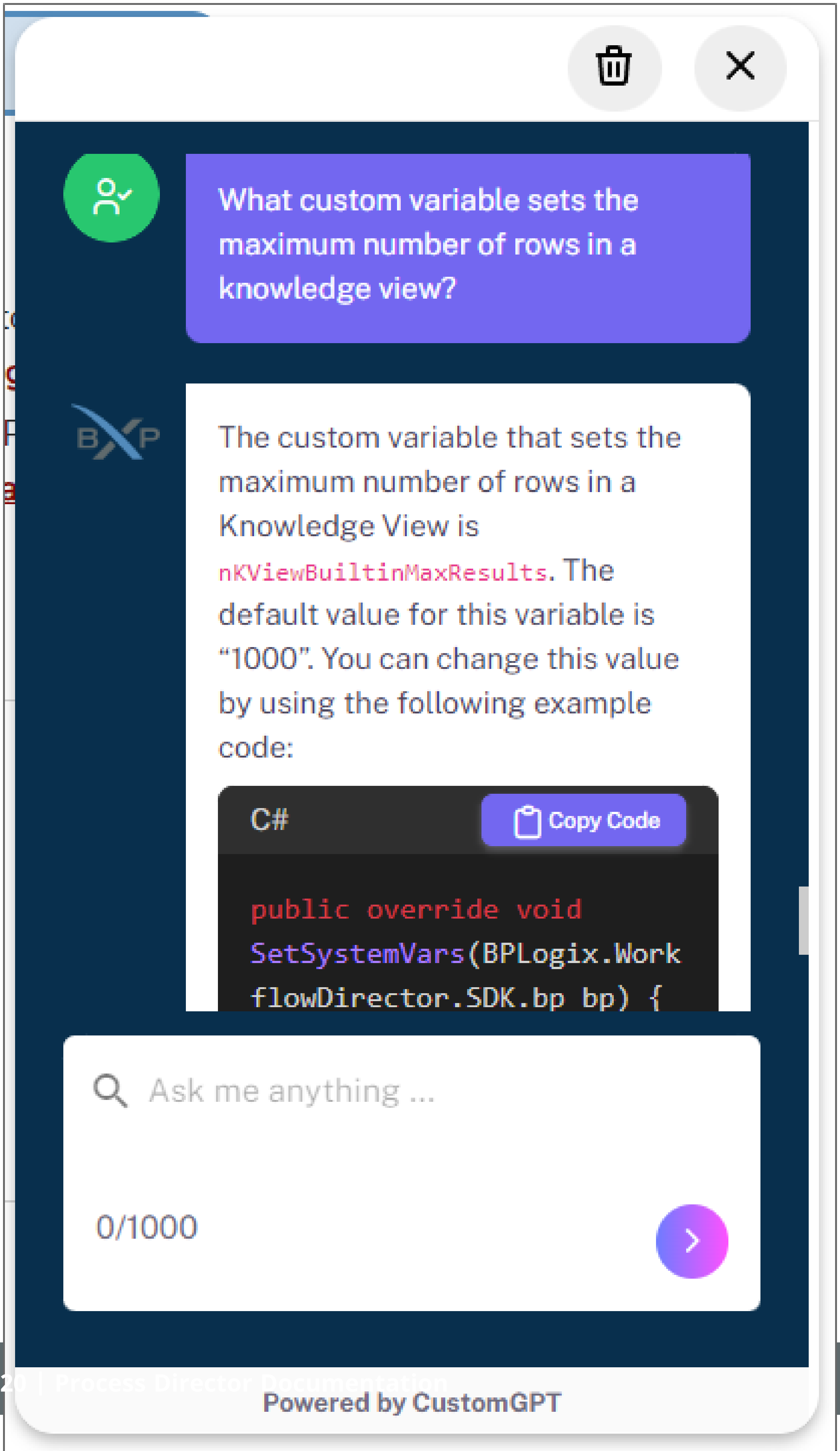
"The context does not provide any information about X."

That isn't necessarily true. It doesn't mean the information isn't there. Actually, it may also mean that, but generally it means that the chatbot can't answer your query based on the information it was given in the query. It doesn't understand the context. This phrasing is imprecise, but it is, as mentioned previously, a standard, boilerplate response.

Chatbot Access

CustomGPT is accessed via a small icon that appears at the bottom right corner of every page.

Clicking this icon opens a chatbot where you can enter your queries and receive a response, such as the one shown in the example below.


What custom variable sets the maximum number of rows in a knowledge view?
The custom variable that sets the maximum number of rows in a Knowledge View is nKViewBuiltinMaxResults. The default value for this variable is "1000". You can change this value by using the following example code:
C#
Copy Code
public override void SetSystemVars(BPLogix.WorkflowDirector.SDK.bp bp) {
Ask me anything ...
0/1000
Powered by CustomGPT

The CustomGPT service has trained ChatGPT on:

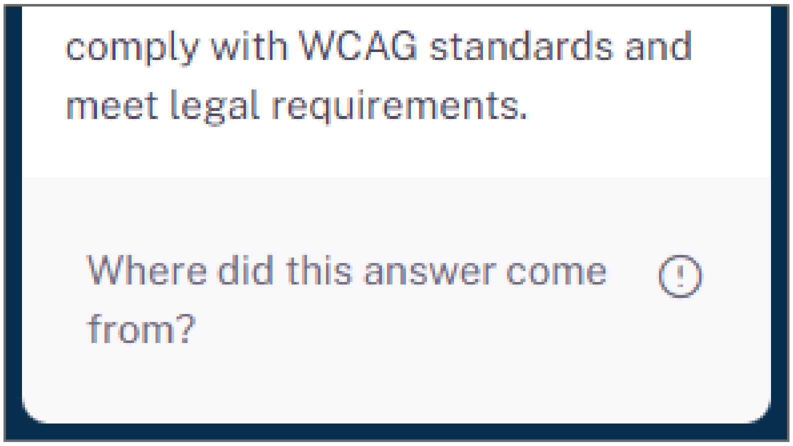
- all of the documentation topics that exist everywhere in the Process Director documentation.
- The content of the weekly Training Webinar Videos.

You can ask a question about any topic that exists in the documentation or training webinars and, hopefully, receive a relevant and helpful response.

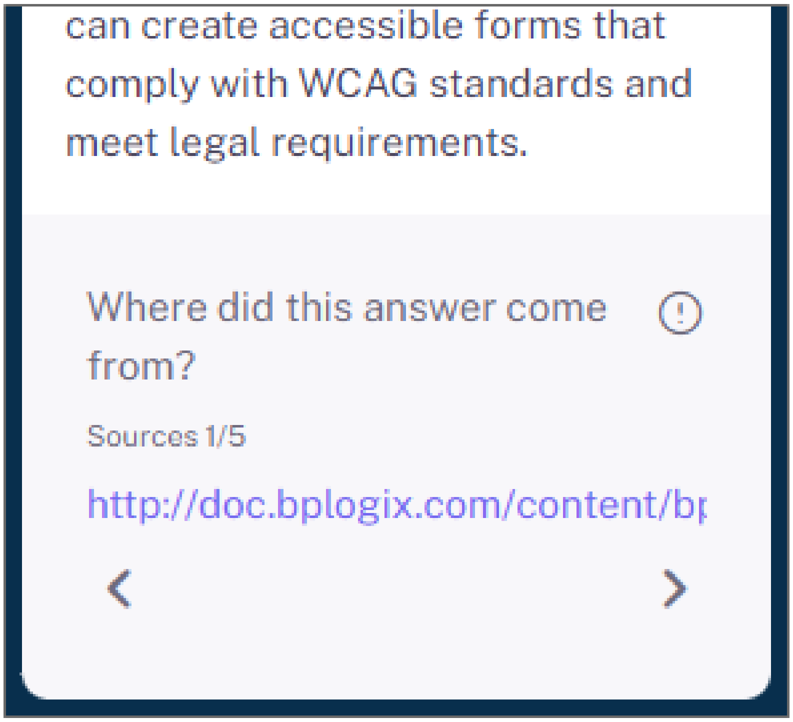
CustomGPT has been trained only on thethe topics listed above, so questions that fall outside that scope can't be correctly answered. If you ask a question that's not covered in the documentation, CustomGPT will respond with a message that tells you it cannot provide an answer in the given context—the "context" being the information on the Documentation web site.

Response Sources

Once CustomGPT has answered your query, the bottom of the answer will contain a section labeled, Where did this answer come from?



If you click this section, it will expand to display links to the documentation topics or videos that were used to construct the answer the chatbot provided, and the number of source topics that were used to provide the response.



Left and Right Arrow icons will, if more than one topic was used, enable you to navigate to each topic used to provide the response. Clicking on the link for each topic will open the topic in a new browser tab, so that you can read the source topic for the answer.

Documentation Feedback

At the bottom of each page in the documentation, there's a button to provide Documentation Feedback. This Feedback button will open a Process Director Form that enables you to contact BP Logix directly with any questions or comments you might have. All questions or comments sent via Documentation Feedback are sent directly to BP Logix personnel and are manually reviewed for action, whether that's making a change to the documentation to correct an error, or answering a question.

The Documentation Feedback system serves two purposes.

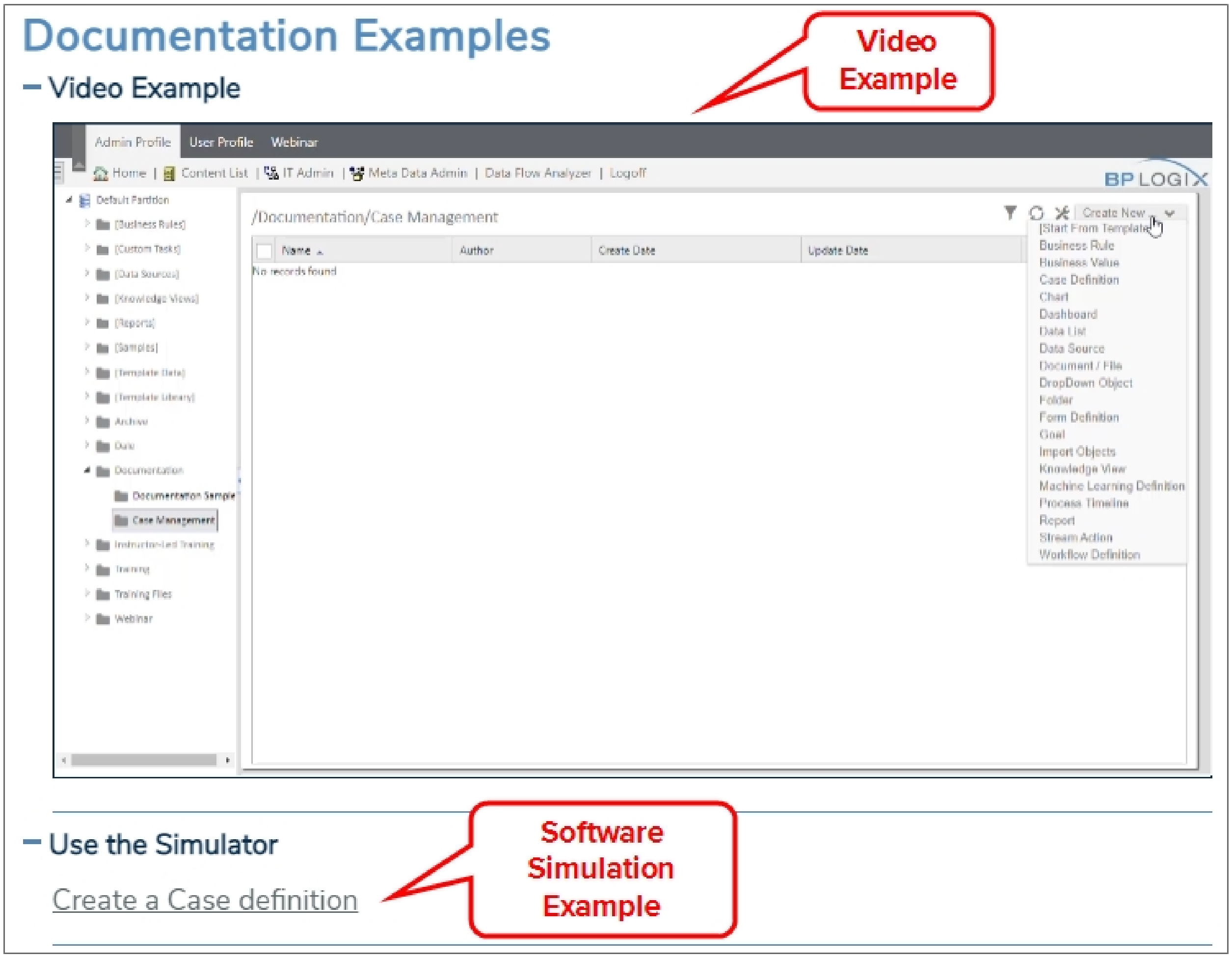
First, Feedback enables you to point out mistakes like typographical errors, or to comment on documentation topics that seem unclear. In any set of documents for a product like Process Director, which consists of thousands of pages of printed documentation, some errors are always unavoidable. Feedback enables you to point out these errors and have them corrected quickly.

Second, if you can't find the information you're seeking by 1) navigating through the documentation, 2) performing a search, or 3) using the AI Chatbot, you can use the Feedback Form to ask a question about a documentation topic (or where to find it) as a final fallback. Once submitted, your question will be reviewed and answered via the email address you provide on the documentation feedback form. While you can ask any question you'd like, keep in mind that questions unrelated to documentation topics may receive a reply asking you to contact your BP Logix Account Representative or Services team for assistance, depending on the nature of the question.

When you submit a comment or question with the Feedback Form, responses are *usually* provided within a business day, but may take longer, depending on the availability of personnel to answer your question, or the level of effort required to make a requested documentation change. In most cases, feedback responses are provided fairly quickly, but the speed of response is directly related to the level of effort your submission requires to address.

Documentation Examples

Examples of how to perform many common tasks in Process Director are provided through samples presented via software simulation, video, or text walk-throughs. These examples are found under the section headings named **Documentation Example** or **Documentation Examples** in each relevant topic heading. They are also concatenated in the How Do I section of this documentation.



In addition, the BP Logix support site has an archive of basic sample applications on the Software Downloads page that you can download and install into your Process Director installation. Each sample implements a commonly used feature of Process Director applications. You must be logged into the Support Site to access the Software Downloads page. A list of the downloadable sample applications can be found in the Implementation Samples topic of the Implementers Guide.

Change Log

This document lists the **significant** changes or updates to the documentation in the previous year, along with the change dates. This isn't a comprehensive or detailed log of every single change to every topic. It records the general types of change that were made for each revision of the documentation. For instance, it doesn't describe every single typographical error fixed on every page, but instead might simply note the changes as "typo fixes" or some similar verbiage. Minor documentation changes (such as minor typo fixes), or interim changes made in the course of larger revision projects, may not be included below.

Date	Change
3 Jul 25	Added the Journal control to the basic controls toolbar.
1 Jul 25	Added a new Web Services Custom Task, JSON to CSV from a REST call.
30 Jun 25	Reorganization of Developer's guide.
24 Jun 25	v6.1.500 changes: Workflow removed from Create New menu by default, with Global Variables property to enable. Radio Button List replaces Radio Button in Basic Controls toolbar.
18 Jun 25	Updates to the User Picker control. Additional info on task assignment for User Activities.
16 Jun 25	Icon SDK control. FormControl class Display.Style property. New User Search API property for user accounts. Easier custom font usage in the OFD for v6.1.500.
3 Jun 25	New information on using the ValueEx attibute in KView scripts.
28 May 25	A new Icon Guide was added.
9 May 25	Additional M365 CDA settings. New features for the Advanced Show Alert CT. Permissions security improvements. New fOpenFormNewTab Custom Variable. Additional display properties for the Button control.
8 Apr 25	Various v6.1.400 enhancements.
7 Apr 25	Various v6.1.400 enhancements.

Date	Change
18 Mar 25	Additional SharePoint configuration for M365 CDA. Export feature for Form SQL Views.
7 Mar 25	Various updates were made for v6.1.300.
18 Feb 25	Updating Sims and Videos to the v6.1 UI. This is a longer-term project, and will be ongoing.
12 Feb 25	Azure Screenshot updates for SharePoint Datasources. M365 CDA changes to Attach Objects control.
4 Feb 25	Updates to URL Rewrite/ARR for installation. Ongoing updates to sims to v6.1.X UI. Reorg/Updates to Azure-related topics.
28 Jan 25	Wrap Text property added to the Columns tab of the Data List control.
27 Jan 25	Additions/ToC Reorg for O365CDA topics.
23 Jan 25	New topics for Azure/SharePoint configuration for O365 CDA.
13 Jan 25	Added O365 section to CDA topic. Added O365 CDA section to Installation Settings > Properties. Updated MS OAuth PDF.
8 Jan 25	Various v6.1.300 updates.
9 Dec 24	New property for Export Array to CSV CT. Copying process attachments to parent improvement. ConceptShare attachments support dropped.
7 Nov 24	Changes to the syntax of the Goal System Variable. Custom Task drag-and-drop ability in Form definitions.
18 Oct 24	Live Stats page added to System Admin.
11 Oct 24	Added Google SMTP OAuth to bpEmailImport.
7 Oct 24	Added Google SMTP OAuth to Properties page, and updated the Provision Users CT for MFA, both for v6.1.300.
16 Sep 24	UI Changes to the Edit User properties page of User Administration.
11 Sep 24	Added additional warnings to make it clear that encrypted Form fields/Case properties are not searchable via KView filters.
5 Sep 24	CSV format added to the Run Report Custom Task. Added a new ServiceHandle method to Web Services.

Date	Change
4 Sep 24	Changes to Data List System Variables. Updates to Permissions Methodology for global objects and Knowledge Views. Added new MFA Authentication feature description and user properties.
6 Aug 24	Various UI and other updates for v6.1.300.
12 Jul 24	Various updates for v6.1.109: SQL Command and Form Save CTs, Content List updates, nDBCommandTimeout Custom Variable
10 Jun 24	New Data List features for v6.1.200. Changes to Installation Settings > Properties.
7 Jun 24	Updates to Workspace configuration.
29 May 24	Various updates for v6.1.105 and v6.1.200. Documentation font style change to Noto Sans.
26 Apr 24	Change to the default behavior of the fEnableContentListLimit Custom Variable, other minor UI and technical changes for v6.1.200.
19 Apr 24	Updated screenshots for the v6.1.200 UI for Process Timeline Activities.
11 Apr 24	Additional Facebook and X (Twitter) references removed.
27 Mar 24	Updates to Business Rule system variables and configuration for custom parameters. Social Media Custom Tasks removed from the product and documentation, due to API changes.
22 Mar 24	Updates to the new UI for SAML/Windows SSO, and changes to the items displayed in the Workspace nav bar.
19 Mar 24	v6.1 updates to user administration.
1 Mar 24	Update to WebDAV note for installation.
27 Feb 24	Added additional explanation of how Directory Synchronization works.
22 Feb 24	Updates to database connection strings and v6.1 UI.
12 Feb 24	Changes to reflect changes to Clone Table CT, Data List Control, and [Template Library] folder.
9 Feb 24	Standalone AI chat page added.

Date	Change
7 Feb 24	Update to the Data List control's Usage section.
31 Jan 24	Expanded documentation for configuring the AutoMultilineTextBoxResize var, the AutoMultilineTextBoxResizeClass var, and multi-line Input controls for auto-resizing.
24 Jan 24	Updates to how Top Navigation Buttons appear in Workspaces in v6.1.0.
23 Jan 24	New navigation menu items added to Implementation and System Administration guides to consolidate OAuth configuration topics. New PDF guide for OAuth.
22 Jan 24	Even more updates to SMTP OAuth for Azure.
19 Jan 24	Updates to SMTP OAuth for Azure.
17 Jan 24	New Clone Table from DB Custom Task. Applying special text properties via DIV tags in the Online Form Designer.
03 Jan 24	Update to Global Knowledge Views for v6.1.0. New navigation icon for folders.
02 Jan 24	Added debug mode menu to the User Profile Menu and Debug Mode topics.