




Self Help - Form - Standard Use Case

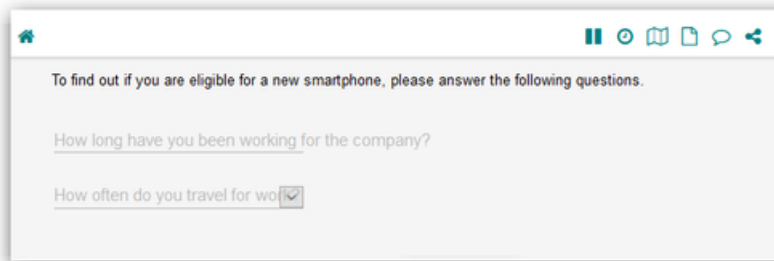
TABLE OF CONTENTS

Contents

- [Overview](#)
- [Phase 1: Create the form for collecting information](#)
- [Phase 2: Define the eligibility conditions for a smartphone](#)
- [Phase 3: Process the result of the smartphone eligibility test](#)
- [Phase 4: Test the workability of the form.](#)
- [List of files to download](#)

To help you set up this use case, you can download the relevant documentation and the sample project.  See [List of files to download](#).

This use case describes a form that enables users to find out if they are eligible for a new smartphone based on their answers. Users must have worked two or more years for the company and travel frequently for business.



To find out if you are eligible for a new smartphone, please answer the following questions.

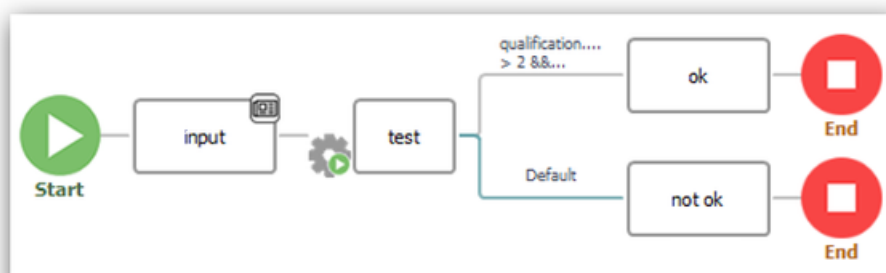
How long have you been working for the company?

How often do you travel for work?

OVERVIEW

The implementation of the use case is performed in several phases:

- [Phase 1: Create the form for collecting information](#)
 - Create an *Input field* element to obtain the number of years the employee has worked for the company.
 - Create a *Single choice list of values* element to obtain the employee's business travel frequency.
 - Create a *Page* step to display the form.
- [Phase 2: Define the eligibility conditions for a smartphone](#)
 - Create an *Action with Switch* step to manage two possibilities, *Eligible for smartphone* and *Not eligible*.
 - Create the eligibility conditions: employees must have worked two or more years for the company and travel frequently for business.
- [Phase 3: Process the result of the smartphone eligibility test](#)
 - Create a *Page* step to process the *Eligible for smartphone* result (conditions fulfilled).
 - Create a *Page* step to process the *Not eligible* result (conditions not fulfilled).
- [Phase 4: Test the workability of the form](#)
 - Run the procedure for displaying the form.
 - Answer the two questions displayed in the form and check that the correct message is displayed.



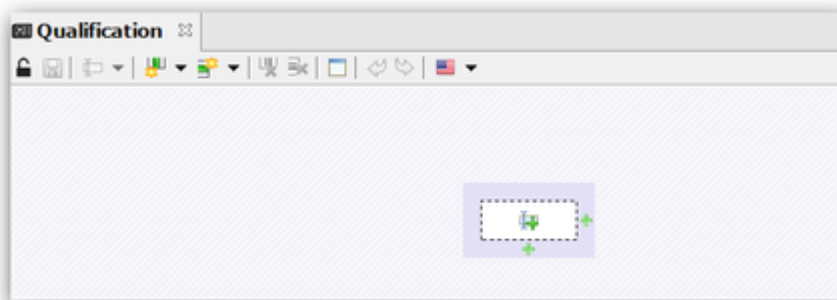
PHASE 1: CREATE THE FORM FOR COLLECTING INFORMATION


Step 1: Create the form.

1. Expand the [tree structure](#) in the **Explorer** pane for the Self Help project in which you want to create your form.
2. Right-click the folder where the new form should be created and select *New > Form* from the contextual menu. The form will be inserted in the **Explorer** pane. Its name will be *<New form>*.
3. Rename the form, *Qualification*.

Step 2: Create the form elements.

1. Double-click the form in the **Explorer** pane.
 - The **Conception** pane will appear.
 - The first cell in the form will appear.



2. Add the element to obtain the number of years worked for the company.
 - Click  in the form cell and select *Add an input field* from the contextual menu. The properties window of the new element will appear.

 A screenshot of a dialog box titled 'New form field properties'. The dialog has a header 'Add a new form widget' and a sub-header 'You can set the label, the output parameter name, the size of this new form field'. The fields are:



- Label: 'How long have you been working for the company?' (text input)
- Input type: 'Number' (dropdown menu)
- Required field:
- Data: from project library, manual management
- Output parameter: 'seniority' (text input)
- Input parameter: 'seniority' (text input)
- Field size: '250' (text input)
- Label size: Align label on column size, Forced size (text size if empty): (text input)

 At the bottom, there are 'Finish' and 'Cancel' buttons.

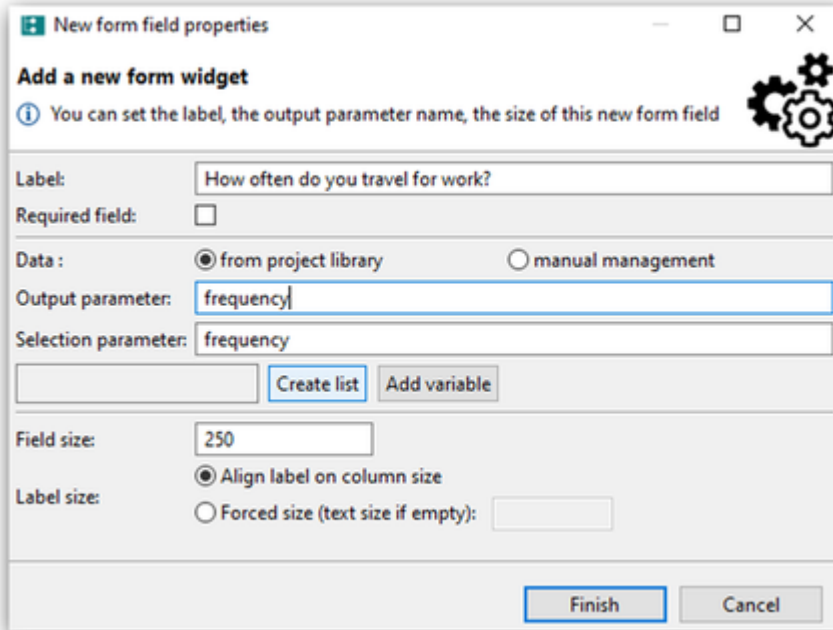
- Enter the label of the element: *How long have you been working for the company?*
- Indicate that the element is a number by selecting *Number* in the **Input type** field.

- Modify the names of the input and output parameters to *seniority* so that you can identify them easily.
- Click **Finish**.

3. Add the element to obtain the frequency of business travel.

- Click  at the bottom of the form to add a row.
- Click  in the new form cell and select *Add a single choice list of values* from the contextual menu.

The properties window of the new element will appear.



New form field properties

Add a new form widget

You can set the label, the output parameter name, the size of this new form field

Label:

Required field:

Data: from project library manual management

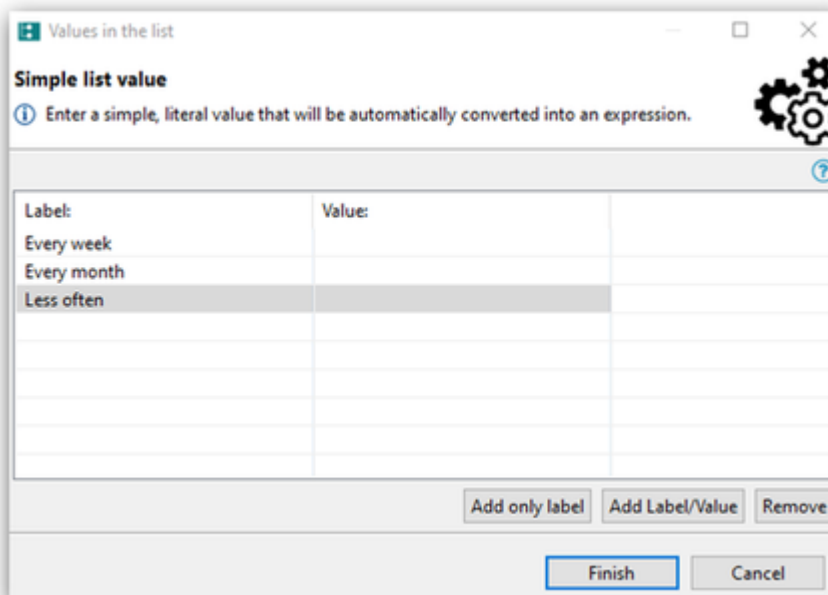
Output parameter:

Selection parameter:

Field size:

Label size: Align label on column size Forced size (text size if empty):

- Enter the label of the element: *How often do you travel for work?*
- Modify the names of the input and output parameters to *frequency* so that you can identify them easily.
- Click **Create list** to specify the frequencies that users can select.
 - Click **Add only Label** to add each new value.
 - Enter the three choices possible, *Every week*, *Every month*, *Less often* in the **Label** column.



Values in the list

Simple list value

Enter a simple, literal value that will be automatically converted into an expression.

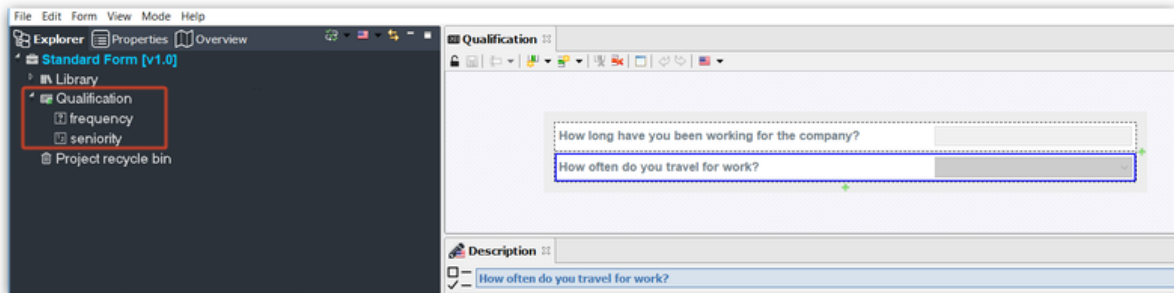
Label:	Value:
Every week	
Every month	
Less often	

- Click **Finish**.

You will return to the window for creating the form element.

- Click **Finish**.

The form elements will appear in the **Explorer** pane.



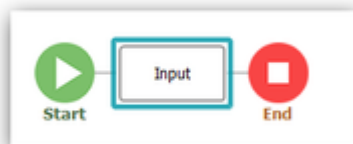
Step 3: Create a procedure step to display the form.

1. Create a new procedure.

- Right-click the Self Help project in which you created your form and select *New > Procedure* from the contextual menu. The procedure will be inserted in the **Explorer** pane. Its name will be *<New procedure>*.
- Rename the procedure, *Can I have a new smartphone?*

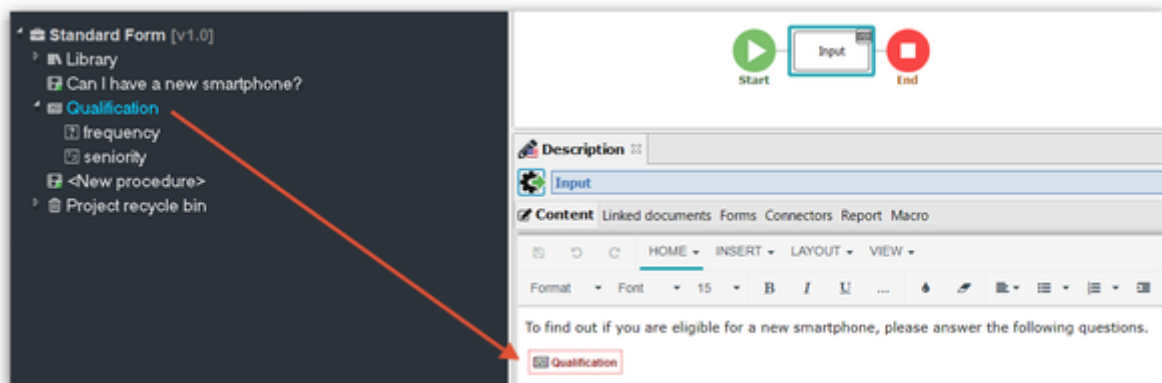
2. Add a Page step.

- Double-click the procedure in the [tree structure](#) of the **Explorer** pane. The procedure will appear in the [Conception pane](#).
- Right-click the *Start* step  and select *Insert a Step > Insert a Page* from the contextual menu.
- Name the step, *Input*.



3. Associate the *Qualification* form with the step.

- Select the **Content** tab in the [Description pane](#).
- Enter the following text: *To find out if you are eligible for a new smartphone, please answer the following questions.*
- Click and drag the *Qualification* form from the [Explorer pane](#) to the **Content** tab.



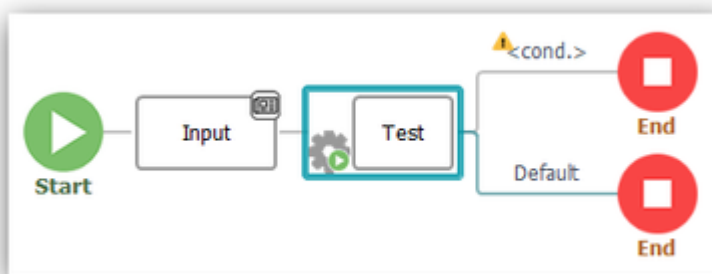
PHASE 2: DEFINE THE ELIGIBILITY CONDITIONS FOR A SMARTPHONE

Step 1: Create a step for adding the eligibility conditions.

1. Right-click the *Input* step and select *Insert a Step > Insert an Action with Switch* from the contextual menu.
2. Name the step, *Test*.

Two branches will be created.

- The top branch *<Condition>* manages the response to be provided if employees are eligible for a new smartphone.
- The bottom branch *Default* manages the response to be provided if employees are not eligible for a new smartphone.



Step 2: Define the eligibility conditions for a smartphone.

1. Double-click the *<Condition>* field in the top branch.
The window for defining the condition will appear.
2. Enter the eligibility conditions.

Edit condition

Edit the condition of this branch

Press Finish to confirm changes.


Wizard | Show expression

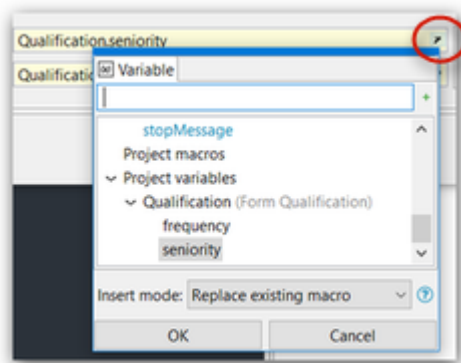
All conditions must be true (AND)



+ Add a condition line

qualification.seniority	greater than	2
qualification.frequency	equals	"Every week"

Finish Cancel

- Define the condition where seniority must be greater than two years.
 - Select the *Qualification.seniority* project variable that stores the number of years worked for the company. Click  and go to the *Project variables > Qualification* section.


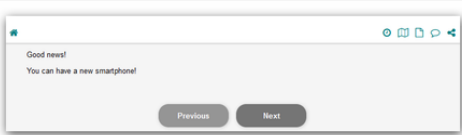


- Select the *greater than* operator and enter the value 2.
 - Define the condition where business travel frequency must be weekly.
 - Click  [Add a condition line](#).
 - Select the *Qualification.frequency* project variable that stores the frequency of business travel. Click  and go to the *Project variables > Qualification* section.
 - Select the *equals* operator and enter the value "Every week". **Caution:** You must enter the value surrounded by double quotes.
 - Indicate that both conditions must be fulfilled by selecting *All conditions must be true (AND)* from the list at the top of the window.
 - Click **Finish**.
- The condition will be refreshed.

PHASE 3: PROCESS THE RESULT OF THE SMARTPHONE ELIGIBILITY TEST

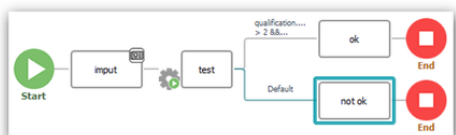
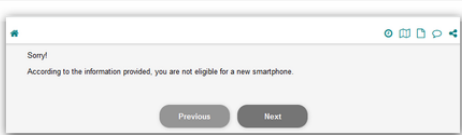
Step 1: Process the *Eligible for smartphone* result.

1. Insert a *Page* step after the top branch that will be called if the eligibility conditions are fulfilled. Name it *ok*.
2. Select the **Content** tab in the **Description** pane.
3. Enter the message informing employees that they are eligible for a new smartphone.




Self Help	Example
	

Step 2: Process the *Not eligible* result.

1. Insert a *Page* step after the bottom branch that will be called if the eligibility conditions are not fulfilled. Name it *not ok*.
2. Select the **Content** tab in the **Description** pane.
3. Enter the message informing employees that they are not eligible for a new smartphone.

Self Help	Example
	

PHASE 4: TEST THE WORKABILITY OF THE FORM.

1. Click  in the toolbar of the **Conception** pane to save the *Can I have a new smartphone?* procedure.
2. Make the procedure available to users.
 - Right-click the procedure in the tree structure of the **Explorer** pane and select *Allow launch by users* from the contextual menu.
The  icon will appear after the procedure label.
3. Display the procedure in the **Conception** pane and click  in the toolbar.
The form will appear in a new Web browser tab.
4. Answer the two questions displayed in the form and check that the correct message is displayed.

LIST OF FILES TO DOWNLOAD

- [PDF file for the use case](#)
- [Self Help project archive](#) containing the use case