



**PANTHEON**<sup>®</sup> ACADEMY

## Workflow Workshop for Implementers and Developers

### Main Topics:

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- Duration: 12 hours / 2 days / online
  - Format: Workshop: demo → hands-on exercise → review and discussion
  - Target group: Implementers, consultants, support specialists and developers who work with Workflow processes in PANTHEON..
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### Training description:

**Workflow Workshop for Implementers and Developers** is a practical training designed to help participants understand how Workflow is used to automate real business processes in PANTHEON. The workshop starts with the core Workflow logic and basic blocks, then continues with document handling, metadata, e-document import, user tasks, approvals, invoice processing, ARES integration, REST service calls and printing.

The focus is not only on understanding individual Workflow blocks, but on connecting them into practical scenarios that participants can later use in real implementation and support cases.

### Required Knowledge:

Participants should have basic knowledge of PANTHEON and understand the general logic of business processes, documents and document types. Basic familiarity with PANTHEON Documentation/DMS, eDocuments, user tasks and approval processes is recommended. For advanced exercises, basic understanding of ARES, variables, database logic and integrations/REST services will be useful, but not mandatory.



# DAY 1 - Workflow Basics, Blocks, Documentation and Document Processing

## 1. Chapter | First part, 3 hrs

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### Content:

1. **Short WF presentation with basic information.**
2. **Explanation of blocks with examples:**
  - Business process / Workflow:
    - Start
    - End
    - Transition
    - Decision
    - Send
    - Database
    - Text
    - Exercise – based on the Bootcamp PPT
  - Documentation:
    - Classification
    - Metadata
    - Document
    - Exercise
    - Mailbox – elaboration: for import from folder and REST service setup
  - PANTHEON forms:
    - Document type
    - ARES
    - User message
    - Select user
    - Exercise – present global variables:
      - DocumentKey
      - DocumentType
  - Input / Output:
    - Receive e-documents
3. **Different types of receiving in practice:**
  - from disk
  - from e-mail



- from REST service
- **scanning as a basis**
- 4. **Scanning**
- 5. **Exercise**
- 6. **Output:**
  - to disk
  - to e-mail
  - sending through service
- 7. **Registered functions**

**Practical outcome:**

Participants understand the basic Workflow concept, key Workflow blocks, the connection with Documentation and PANTHEON forms, and the basic input/output options used in practical Workflow scenarios.

## 2. Chapter | Second part, 3 hrs

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**Content:**

1. Tasks / User tasks:
  - Task
  - User absence – check whether this works
2. Creating WF for metadata entry, creating document header and creating document positions:
  - possibility to divide positions
3. Macro – mandatory entries
4. Scanning and entering eInvoices:
  - confirmation
  - sending e-mail to accounting
5. Invoice liquidation:
  - reading money/value amounts
  - defining responsible persons through the Decision block
6. Discussion

**Practical outcome:**

Participants understand how to use Workflow for user tasks, metadata entry, document creation, mandatory entries, eInvoice scanning and invoice liquidation with responsible person logic.



## Day 2 - Practical Workflow Examples, ARES Integration, REST Services and Advanced Use

### 3. Chapter | Examples and exercises, 6 hrs

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#### Content:

1. Recap of the previous day, additional answers and exercise:
  - metadata entry
  - eInvoice scanning
  - invoice liquidation
  - planned duration: 1.5–2 hrs
2. ARES – different practical use examples:
  - starting ARES from WF
  - ARES block in WF
  - displaying documentation in ARES and starting WF from ARES
  - ARES – WF communication:
    - transfer of variables
3. Using Mailbox for calling REST services:
  - explanation of variables
4. Printing DMS documents through the Print block
5. Printing PANTHEON reports
6. Parameterization – new – Miloš
7. Exercise
8. Discussion

#### Practical outcome:

Participants consolidate the topics from Day 1 and understand how to use ARES, Mailbox/REST, printing, parameterization and variables in practical Workflow scenarios.

### Expected learning outcomes

After the workshop, participants should be able to:

- understand the basic logic and structure of Workflow in PANTHEON,
- use key Workflow blocks such as Start, End, Transition, Decision, Send, Database and Text,



- connect Workflow with Documentation, classifications, metadata and documents,
- use Workflow with PANTHEON forms and global variables such as DocumentKey and DocumentType,
- understand different input/output options, including eDocuments, scanning, e-mail, disk and REST service,
- create Workflow processes for user tasks, metadata entry, document headers and document positions,
- understand eInvoice scanning, confirmation, sending to accounting and invoice liquidation,
- use ARES in different Workflow scenarios and understand variable transfer between ARES and WF,
- use Mailbox for REST service calls and understand the role of variables,
- include printing of DMS documents and PANTHEON reports in Workflow processes,
- understand the basics of parameterization and apply it in practical Workflow examples.