



**RAYFLOW<sup>®</sup>**

Workflow  
Management

**User Guide RayFlow Client 6.0**

RayFlow is part of RaySuite.



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User Guide RayFlow Client RayFlow Client 6.0

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# Introduction

## About This Guide

This guide describes all of the important features and functions of the RayFlow desktop client. The RayFlow desktop client works synchronously with the RayFlow web server.

Changes and settings that occur on the RayFlow server are continuously checked, downloaded and updated on the RayFlow client.

To find out more about different configuration options and settings that are applicable for the RayFlow client, refer to the *RayFlow Web User and Administration Guide*.

## What Is in This Guide

This guide contains the following information:

- Getting started with the **client**
- An overview of the features and functionality
- Client configuration

## Where to Find the Latest Information about RayFlow

For further information on RayFlow, including its features, functionality and latest updates visit [www.raynet.de](http://www.raynet.de).

## How to Provide Comments about This Guide

We welcome your suggestions and input on the various documentation resources available with RayFlow and its components. Your comments and requests can be forwarded through your Raynet support representative.

## Additional Resources

Further information regarding RayFlow Client can be found in several resources.

- The *RayFlow 6.0 Release Notes* provide an overview about the changes and new features that are part of this version of RayFlow Client.
- The *RayFlow Client 6.0 Operations Supplement* provides information about third-party software packages and libraries redistributed with RayFlow Client.
- The product website <https://rayflow.raynet.de> provides information about the product, news, and support.
- Raynet and its partners offer a range of training courses that can also be customized to meet your requirements. For more information on these courses, speak with your Raynet consultant or contact the Raynet Sales department via [sales@raynet.de](mailto:sales@raynet.de).

# System Requirements

The given requirements name prerequisites for devices running the RayFlow Client application.

## Hardware Requirements

### Minimum Hardware Requirements:

- CPU Pentium IV / Core2 processor
- 2 GB RAM
- 1 GB free hard disk

### Recommended Hardware:

- CPU Intel Core i5 or i7
- 8GB RAM
- 10 GB free hard disk

## Supported OS

The following represents the list of supported operating systems at the time of release.

- |                     |                               |
|---------------------|-------------------------------|
| • Windows Vista     | • Windows Server 2008 SP1-SP2 |
| • Windows 7         | • Windows Server 2008 R2      |
| • Windows 8         | • Windows Server 2012         |
| • Windows 8.1       | • Windows Server 2012 R2      |
| • Windows 10SP3 x64 | • Windows Server 2016         |

## Prerequisite Software

- Windows XP SP2 (recommended Windows 7 or 8)
- .Net Framework 4.5

- Windows Installer 4.5

# Migration

## Upgrading the RayFlow Client Application

### General Upgrade Preparations

RayFlow Client 6.0 is delivered as an MSI software package. In order to install it safely:

1. Download the MSI package for RayFlow Client 6.0 from the Raynet resource repositories.  
(If you have not already received credentials, please contact the Raynet support team via our [Support Panel](#))
2. Copy all files that need to be kept for later reuse or look-up (such as `RayFlow.exe.config` for proxy settings, `dashboard.xml`)
3. Execute the RayFlow Client 6.0 MSI package and work yourself through the setup routine.

### Adjusting the Newly Installed RayFlow Client Instance

1. Define config files and settings according to the old system state.
2. Launch RayFlow Client.
3. If there are issues regarding broken or missing functionality, please feel free to contact the Raynet support team via our [Support Panel](#).

# RayFlow Client

This section of the document describes the application RayFlow desktop client in detail. After going through this chapter, a user is supposed to be fully aware of the features offered by this product and have to technical know-how to work with those features.

## Salient Features

RayFlow is a software management workflow tool with the ability to support diverse workflow processes. Possessing the ability to be customized to meet the user's needs and requirements makes it one of the most efficient and user friendly workflow management tools. Some of the salient features of RayFlow include:

- Web and Windows Client based workflow process management
- Single Point of software package Information
- Multi client support
- Customizable process, phases, tasks and reports
- Measurable and controllable SLA management
- Single document concept (MAD)

RayFlow is based on the client-server architecture in which all project information, data and configuration is stored on the RayFlow server and users work on this server remotely through the RayFlow web and Windows based clients. Some of the important properties and benefits that the RayFlow Windows client offers, include:

- .Net based application
- User friendly user interface
- Customizable
- Multi project and multi user support
- Metro style Dashboard providing direct access to underlying features
- Integration with other RaySuite and third party products

# Working with RayFlow Client

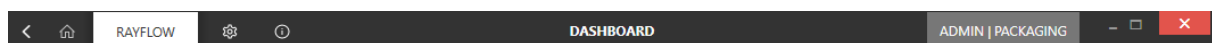
Once RayFlow Client is installed on a machine, launching the program executable from the application installation directory (e. g., C:\Program Files (x86)\RayFlowClient\RayFlow.exe) invokes the RayFlow Client **WELCOME** screen. Once the user has logged into the application and selected the target project, the **HOME** screen is shown.



Once RayFlow Client is up and running, the application screen contains some basic areas, which are always available - even though the actual content of the area varies from view to view:

## The Main Toolbar

Throughout RayFlow Client, the Main Toolbar is visible, which, dependent on the contents of the view shown adds or removes menu items dynamically. As a rule of thumb the items shown below are always present on the Main Toolbar.



### Home

Choosing this button will return you to the **Home Screen**. If any changes have been made to a task in the phase view, you will be prompted to save before returning to the **Home Screen**.

### **View history**

With a left-click on the arrow button, users navigate one step back within the history of recently opened views. Right-clicking the arrow displays the recently visited views, and allows returning to a specific view from that list.

### **Window title**

The **Window title** specifies which content is currently shown as part of the active application context and module.

### **Standard window controls**

The standard window controls allow minimizing, maximizing, resizing and closing the application window. The availability of each control follows the Windows schema for standard controls as known from any desktop application.

### **Application Context**

The illustrations above show the main application context status, which is RayFlow Client.

### **Project and User Context**

This area shows the currently loaded project and the logged in user. Clicking on it will take the user back to the Welcome view.

### **SETTINGS**

Opens the *settings* for RayFlow Client.

### **ABOUT**

Contains information about the currently active product instance.

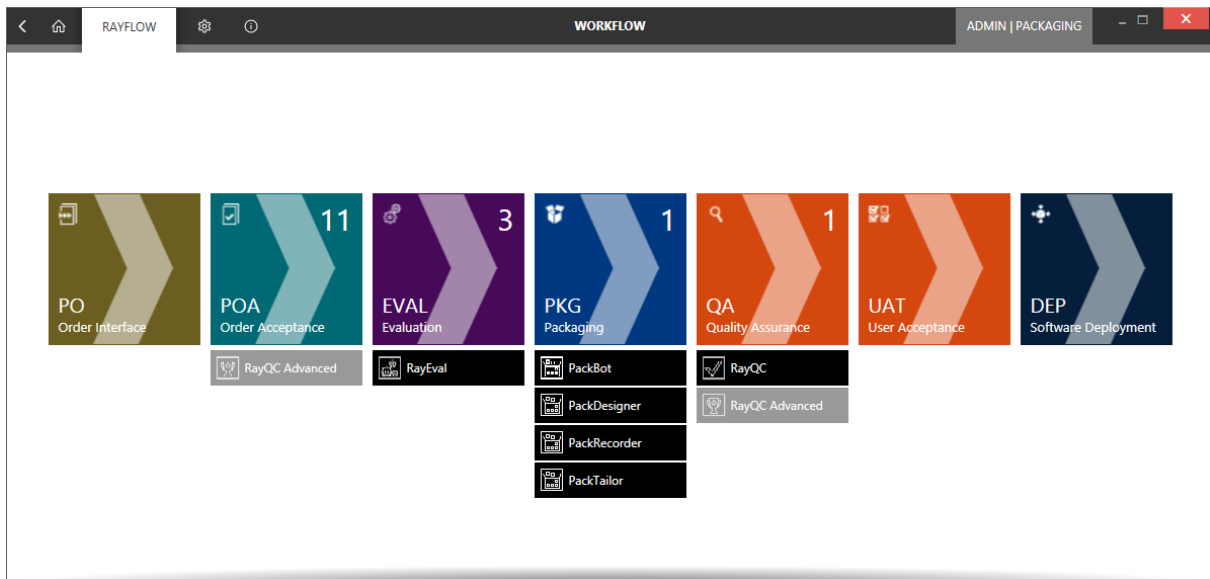
## **The Content Area**

The content area is the core for actual application activity. According to the active application context, it contains the dashboard (as shown in the screenshot at the beginning of this topic), the workflow or tasks, dialogs for settings editing, and so on.

# Workflow

A process workflow consists of different phases, which a task goes through. These phases may include certain actions be carried out against a task until it has completed the final phase.

When a user clicks upon the **show process workflow** tile on the dashboard the **Workflow** window is opened. This window contains tiles which are horizontally arranged and represents each of the different phases within the project that the user has view access to. Each of these tiles displays the name of the respective phase and the number of tasks associated with it. Furthermore, a user can click upon these tiles to open the underlying phase in the **Tasks** window.

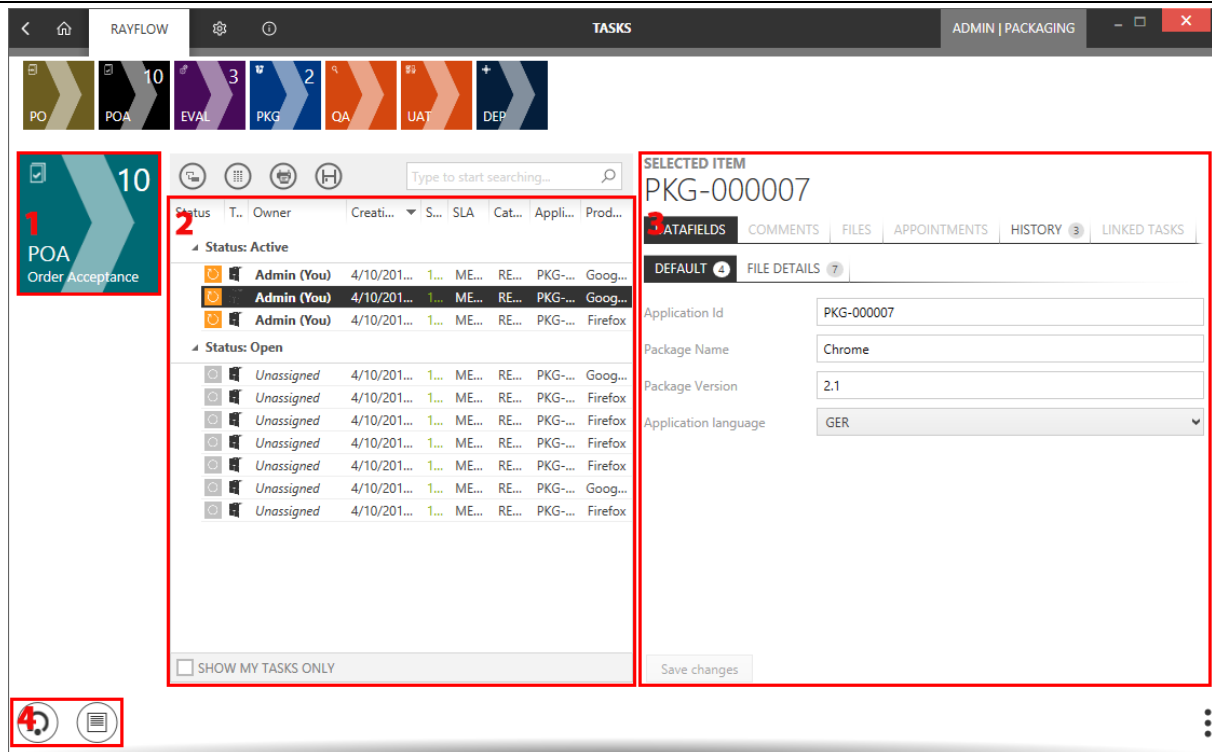


Beneath the tiles, a list of tools configured for that specific phase is catalogued. Tools which are inaccessible by the RayFlow Desktop Client are disabled and grayed out. A user can click upon the tools which are shown to be active, which will consequently open them in standalone mode.

## Tasks Window

Each of the phase within the workflow, opens in the **Tasks** window. This window contains a list of tasks, which are currently associated with the respective phase. The window can primarily be divided into 4 major areas:

1. Selected Phase
2. Task Library
3. Task Details
4. **Refresh** button and the **Hide/Show** button



- **Selected Phase:** Phase that is currently open in the **Tasks** window
- **Task Library:** The **Task Library** lists the tasks that are currently assigned to the selected phase
- **Task Details:** The **Task Details** area includes all the details related to the selected task in the library. Furthermore, a user with permission to edit a task can edit its properties and add new information in form of comments and files. The task viewer is subdivided into four tabular sections: **Datafields**, **Comments**, **Files**, **Appointments** and **History**.
- **Save Changes:** This button gets activated when a property related to a task is modified. To finalize the changes, a user is required to click on this button, before continuing.
- **Show my tasks only:** If selected, the task library is filtered to show only tasks which are assigned to the current user
- **Refresh button:** Clicking on the **Refresh** button will update the window with the changes in the RayFlow server.
- **Hide/Show button:** Can be used to hide or show the selected phase on the left.

## Task Details

### DATAFIELDS

Beneath the **Datafields** tab, all the available properties that are related to the selected task are shown. Based on the data fields configuration in the RayFlow web interface, a property field can either be mandatory or optional within that phase.

## SELECTED ITEM

InstEd

DATAFIELDS

COMMENTS

FILES

APPOINTMENTS

HISTORY 3

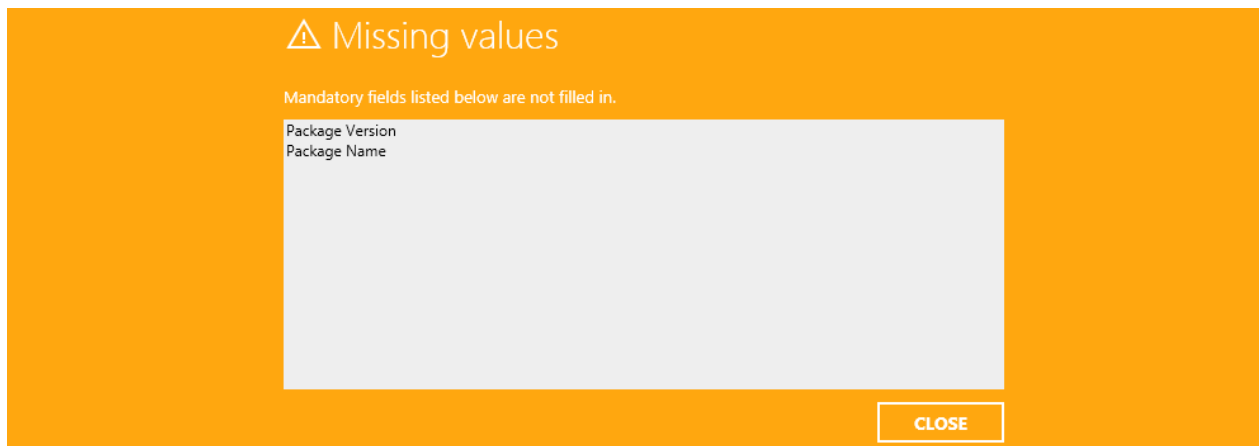
LINKED TASKS

DEFAULT 4

FILE DETAILS 7

Product Name	<input type="text" value="InstEd"/>
Product Version	<input type="text" value="1.5.13.24"/>
FileVersion	<input type="text"/>
Manufacturer	<input type="text" value="instedit.com"/>
Language	<input type="text"/>
Size	<input type="text" value="4.36 MB"/>
Application path	<input type="text" value="\\192.168.42.88\Packages\$\InstEd\InstEd-1.5.13.24.r"/> <input type="button" value="BROWSE"/>

A user must provide an input for the mandatory fields to finalize that task in the current phase in order to either move it to the next phase or reject it to the previous phase. When a user attempts to finalize the task without filling in a mandatory field, the **Missing values** warning is shown. The **Missing values** warning will show the mandatory fields in which a value is missing.

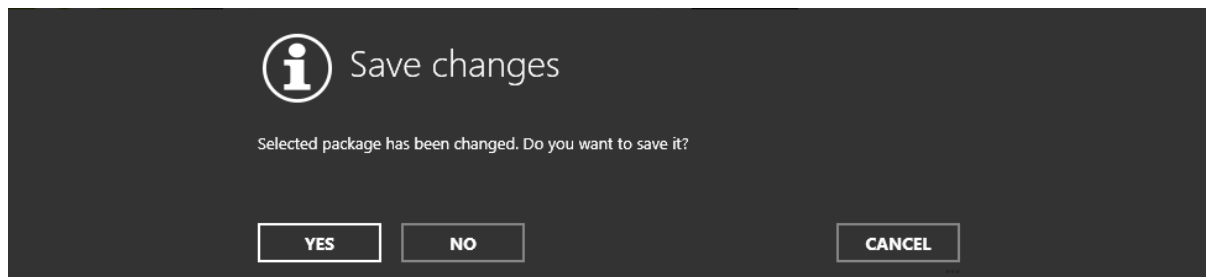


### Editing Property Fields

The following are the prerequisites to be able to edit property fields of a task:

- The user needs edit permission for the phase, in which the targeted task is currently located
- The task must be assigned to the user

When a property field is edited, the **Save changes** button is enabled. To finalize and save the changes made, a user must click upon the button. In case, the user forgets to save the changes and tries to leave the current view, a message is prompted, asking if the changes should be saved or discarded.



## COMMENTS


The comments section of the task viewer consists of a comment viewer and an editor. The comment viewer lists the comments made by different stakeholders of the task. A comment is shown along with the user who has posted the comment and the time at which the comment was posted. Furthermore, users have the ability to enlarge and shrink the comment, to best suit their visual comfort.

### To post a comment:

A user can post a new comment related to a task by selecting the **Add new comment...** button. This will prompt a Add a new comment dialog. After adding the desired comment, select the OK button to finalize adding it to the task.

## Add a new comment

Visibility Default



Enter a package name and package version.

OK Cancel

### FILES

The files section of the task viewer lists the file(s) that are uploaded under the task. This section not only displays the file name but also the user who uploaded it and the time when it was added.

#### SELECTED ITEM

## 7-Zip

APPOINTMENTS 1

HISTORY 6

LINKED TASKS

DATAFIELDS

COMMENTS 1

**FILES 1****Admin** in EVAL

Igor Pavlov - 7-Zip - 16.04.00.0 - 16.0.pdf

5 minutes ago



local

FTP

FTPS

WebDAV

WebDAVSSL

SMB

local

Upload a new file....

Next to the file there are two options **open** and **save as**. Users can define the behavior of the **open** option by going to **Settings > behavior > File handling**. The **save as** option allows its user to save the file to the desired location.

**Warning:**

Since the maximum file size for uploads is limited by the IIS configuration, the maximum size of a file is 2097151 KB (~ 2 GB)!

## APPOINTMENTS

Appointments related to the selected task is shown under the **APPOINTMENTS** tab. Each of the appointment is paired with its status, time stamp, user stamp and phase.


**SELECTED ITEM**

# 7-Zip

DATAFIELDS	COMMENTS 1	FILES
<b>APPOINTMENTS 1</b>	HISTORY 3	LINKED TASKS



7/26/2017 9:30:49 AM

**Open in UAT**ProjectManager 

Contact customer in order to discuss their required UAT plan.

Add new appointment...

### Adding a new appointment

To add a new appointment to the selected task, first select the APPOINTMENTS tab and then click upon the **Add new appointment...** button beneath it. This will open a **Add new Appointment** dialog. Fill in the properties related to the appointment and then click upon OK button to finalize creating the appointment.

## Add new Appointment

Date	<input type="text" value="7/26/2017 9:30 AM"/>
User	<input type="text" value="ProjectManager"/>
Phase	<input type="text" value="UAT"/>
Status	<input type="text" value="Open"/>
Information	<div><div>Cancelled</div><div>Done</div><div>Hold</div><div><b>Open</b></div><div>Rescheduled</div></div>
POC	<input type="text"/>
Machine	<input type="text"/>
Location	<input type="text"/>

*Further information relating to appointments and its properties can be found in the RayFlow Web Administration and Configuration guide.*

### Editing an existing appointment

To edit the properties of an existing appointment, click on the Edit Appointment icon, next to the User property of an existing appointment.

## SELECTED ITEM

7-Zip

DATAFIELDS

COMMENTS 1

FILES

APPOINTMENTS 1

HISTORY 3

LINKED TASKS



7/26/2017 9:30:49 AM

Open in UAT

ProjectManager



Contact customer in order to discuss their required UAT plan.

[Add new appointment...](#)

This will open the selected appointment in edit mode through the Edit Appointment dialog.

## Edit Appointment

Date	<input type="text" value="7/26/2017 9:30 AM"/>
User	<input type="text" value="ProjectManager"/>
Phase	<input type="text" value="UAT"/>
Status	<input type="text" value="Open"/>
Information	<input type="text" value="Contact customer in order to discuss their required UAT plan."/>
POC	<input type="text" value="John Smith"/>
Machine	<input type="text"/>
Location	<input type="text" value="Site1"/>

Edit the appointment properties and then click upon the OK button to finalize changes made to the appointment.

### HISTORY

The history section of the Task Viewer displays the history of the tasks status changes.

## SELECTED ITEM

7-Zip

DATAFIELDS









COMMENTS 1

FILES 1

APPOINTMENTS 1

HISTORY 6

LINKED TASKS

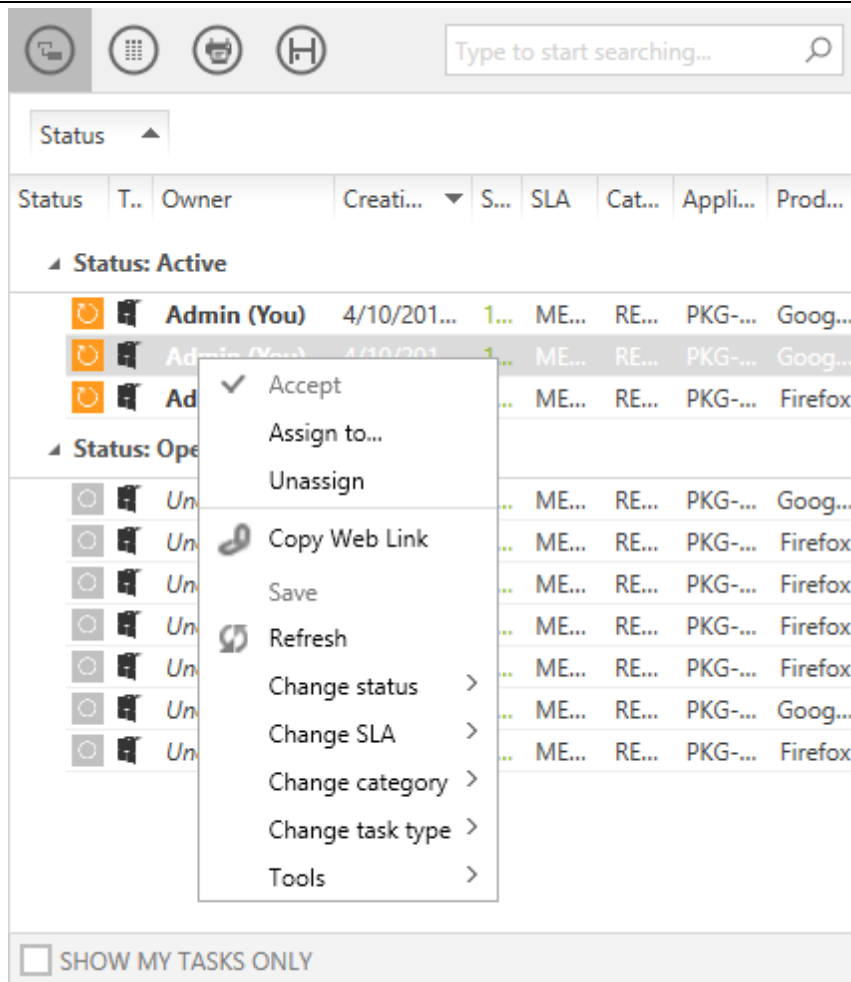
Status	Phase	Date	Duration	User	Action
	EVAL	7 minutes ago	5m 10s	Admin	Uploaded file 
	EVAL	9 minutes ago	2m 3s	Admin	
	POA	9 minutes ago	0s	Admin	
	POA	15 hours ago	15h 25m 4...	Admin	Added comment 
	POA	2 days ago	1d 3h 18...	Project...	
	PO	2 days ago	0s	Project...	

## Tasks Library

This section of the document describes various functional options which are available to users to work with tasks within the library:

### Tasks Library Context Menu

When right-clicking a task within the **Task Library**, a context menu is shown.

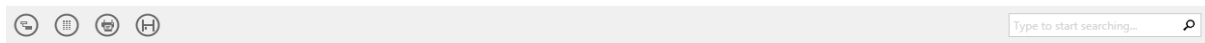


The context menu allows a user to execute the following functions:

- **Accept:** Allows a user to accept an assigned task
- **Assign to:** When selected, opens the User Selector. Select a user from the Selector to assign the task to that user
- **Unassign:** When selected, the status of the task is changed back to open
- **Copy Web Link:** The web link to the task is copied. This web link can be used to directly load the task in a web browser
- **Save:** Save the changes made to the task
- **Refresh:** Refresh the task properties
- **Change Status:** Change the status of the task
- **Change SLA:** Change the SLA of the task
- **Change Category:** Change task category
- **Change Task Type:** Change task type
- **Tools:** Open an associated tool
- **Deploy:** Deploy package on the target deployment tool

Please note that a functional option in the context menu is enabled or disabled, based on the status of the task and permissions that the logged in user has on the task.

## Tasks Library Tool Bar

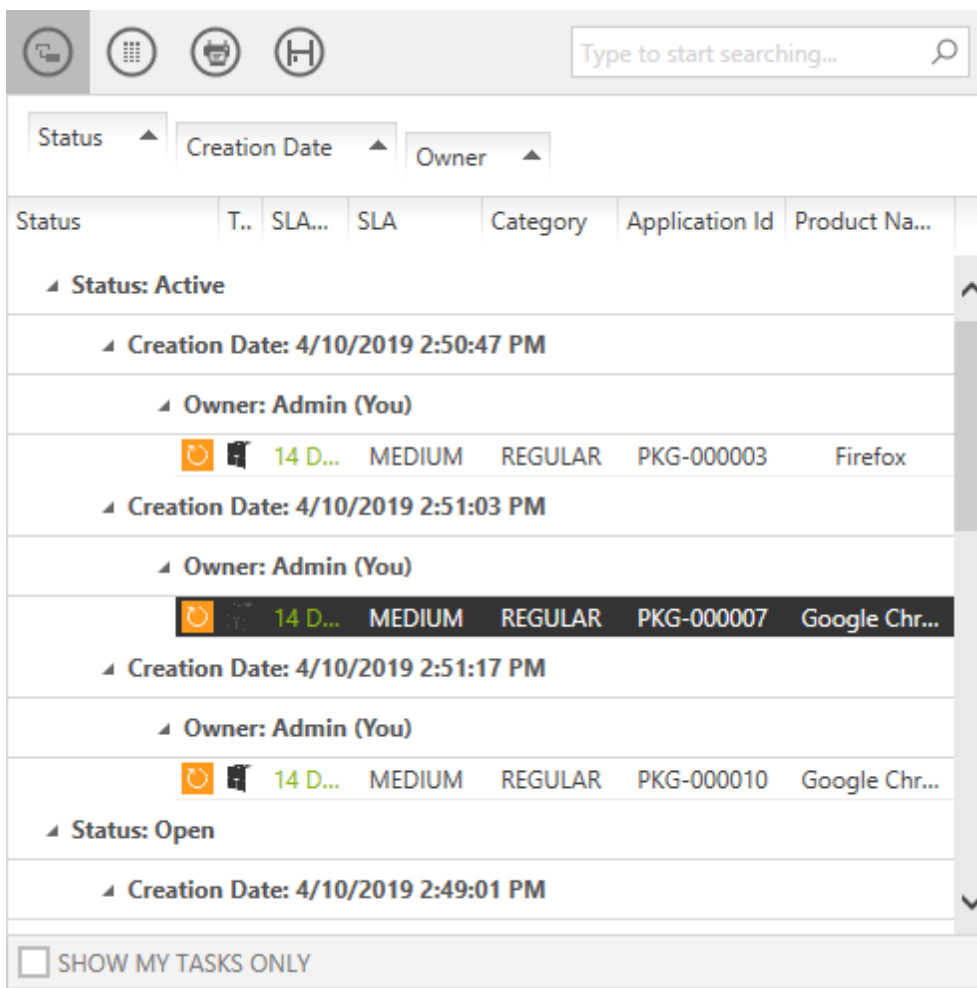


### Advanced Sorting

Advanced sorting allows a user to sort tasks within the library based upon the task properties. To use this function, click upon the **Advanced Sorting** tool in the toolbar.



Selecting this function will open the sorting bar. Within this bar, a user can drag and drop task properties and based upon its placement with respect to the other properties, the tasks within the library will be sorted. As shown in the image below, when a user drags a property from the column header to the sorting bar, blue arrows are shown to indicate the placement of the property.



The screenshot shows the RayFlow Client interface with the Advanced Sorting bar open. The bar includes a search bar and four icons. Below the icons are three dropdown menus: Status, Creation Date, and Owner. The main task list is displayed below the sorting bar, with columns for Status, T., SLA, SLA, Category, Application Id, and Product Name. The tasks are sorted by Status (Active) and then by Creation Date. Blue arrows indicate the placement of properties from the column headers into the sorting bar.

Status	T.	SLA...	SLA	Category	Application Id	Product Na...
▲ Status: Active						
▲ Creation Date: 4/10/2019 2:50:47 PM						
▲ Owner: Admin (You)						
🟡	📄	14 D...	MEDIUM	REGULAR	PKG-000003	Firefox
▲ Creation Date: 4/10/2019 2:51:03 PM						
▲ Owner: Admin (You)						
🟡	📄	14 D...	MEDIUM	REGULAR	PKG-000007	Google Chr...
▲ Creation Date: 4/10/2019 2:51:17 PM						
▲ Owner: Admin (You)						
🟡	📄	14 D...	MEDIUM	REGULAR	PKG-000010	Google Chr...
▲ Status: Open						
▲ Creation Date: 4/10/2019 2:49:01 PM						

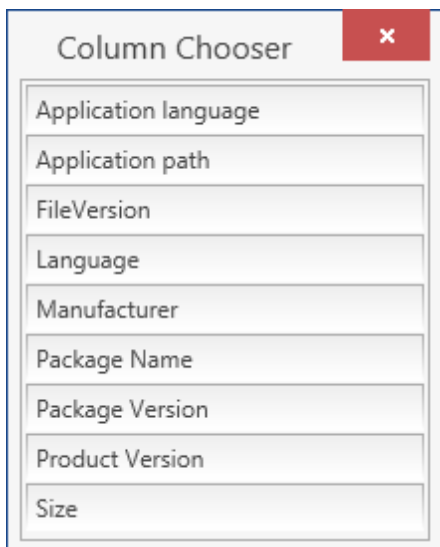
☐ SHOW MY TASKS ONLY

## To manage columns of the tasks library list

The position of each column can be changed by dragging it to the desired place. While dragging, blue arrows indicate the target position when the column is dropped at this point.



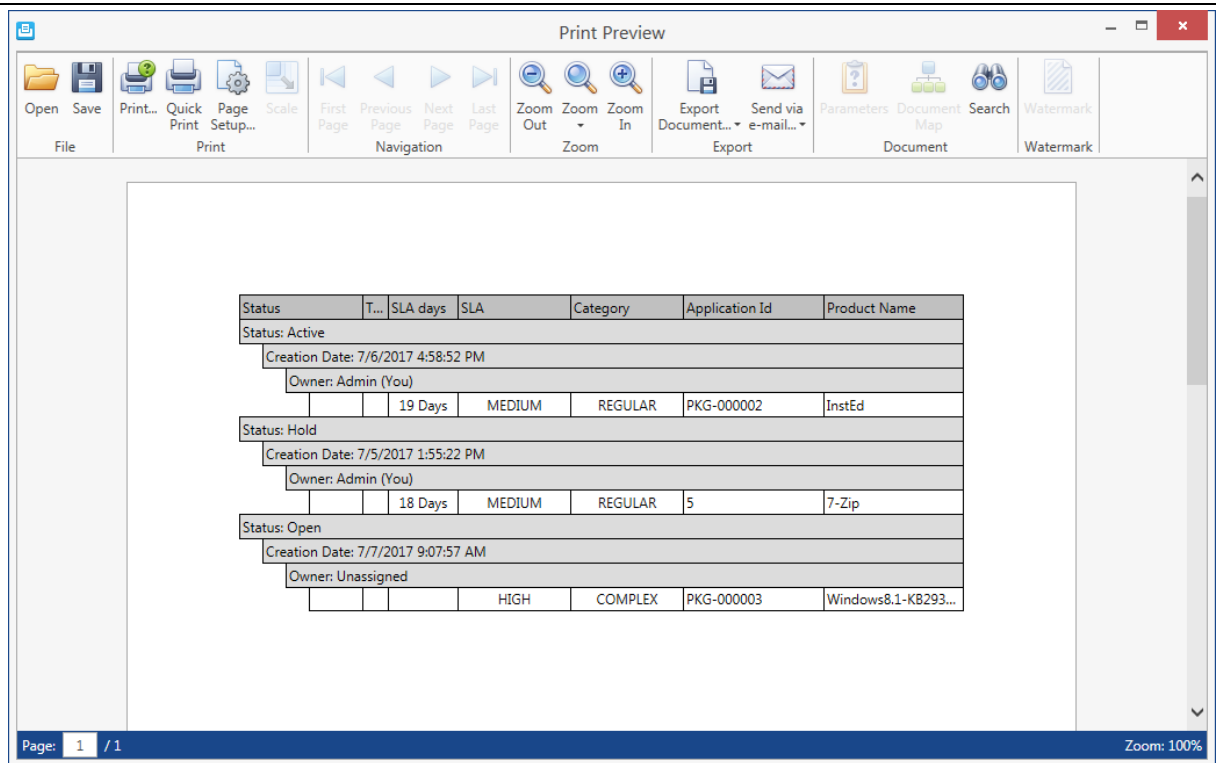
Click on the **Column Chooser** icon to display the **Column Customization** menu. It contains all available columns that are not displayed in the current list setting. To add a column to the view, simply drag it from the menu to the header section of the library. To remove a column, drag the column header to the column menu.



## To print the Tasks Library view contents



To print the currently displayed content of the **Tasks Library** view, hit the **Print** icon. A **Print Preview** dialogue is shown, which allows a user to select the desired printer and printing options.



## To export the tasks library view contents

Exporting the **Tasks Library** view contents can be handy for communication on certain items or structures.



The currently displayed contents of the **Tasks Library** view can be exported to the following formats:

- Excel
- PDF
- HTML
- CSV

To export data:

1. Click on the **export** icon.

A dialogue opens, in which the desired **format** and **target location** for the export can be selected.


2. Click **OK** to start the export.

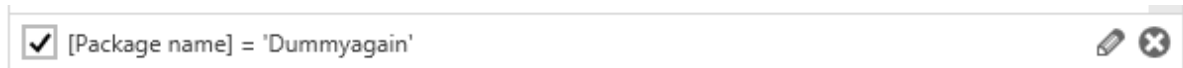
## To filter the Tasks library content

Either use the column value filter to reduce the displayed library content to a certain subset, or use the keyword search field.

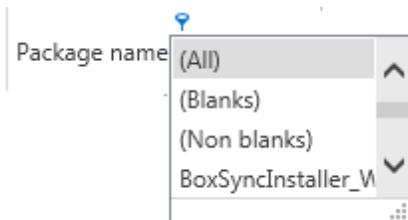


To filter contents by column values, move the mouse pointer over a table header. The filter icon appears. Click on the filter icon to see the set of value options available in this column. Select one of the entries to reduce the displayed library contents to those projects that have the selected column value.

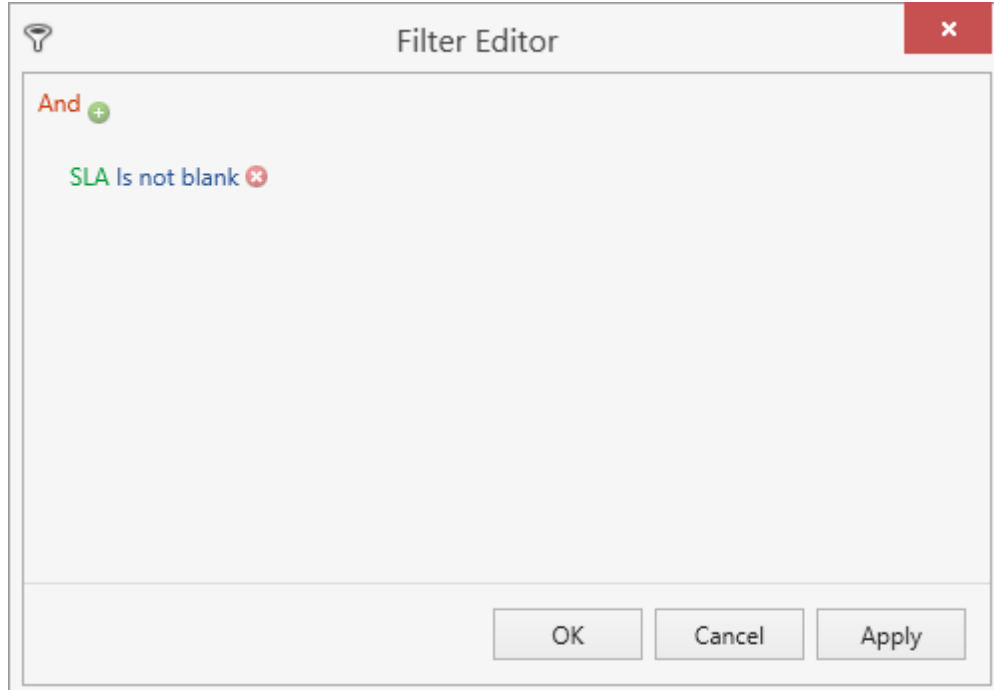
If the column filter is active, the filter icon is permanently displayed in the column header. Open the filter options to see the currently active filter value named above the list of available values. To remove the filter, click on the **(All)** option or simply select the **Cancel** icon (  ) within the filter ribbon available at the bottom of the library.




Column filters can be combined from several column headers.



For advanced filtering, use the **Filter Editor** of the **Tasks Library**. Using this editor, the user can write and customize the query to filter the library.



The **Filter Editor** can either be called through the column header context menu or from the filter ribbon by selecting the edit icon (  ).

To filter the **Tasks Library** by a keyword, enter it into the input field at the upper right corner of the list actions area. Click on the magnifier icon or hit enter on your keyboard to search for the keyword within all displayed

project properties. To deactivate this filter, remove the keyword and use either the magnifier icon or the enter key on your keyboard.

## Group Panel Context Menu

To show the Group Panel, select the **Show Group Panel** option from the **Column Header** context menu. When right-clicked upon, a context menu is shown:



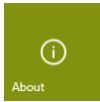
The context menu is disabled when there is no grouping of library contents. When enabled, the **Full Expand** option expands the grouped library contents, the **Full Collapse** option collapses expanded groups and the **Clear Grouping** option clears any grouping in the library.

## Refresh



The contents of the **Tasks Library** are not refreshed periodically, but automatically after certain events (e.g. when you change a package status). To refresh the list content manually, use the refresh button available on the bottom-left corner of the task window.

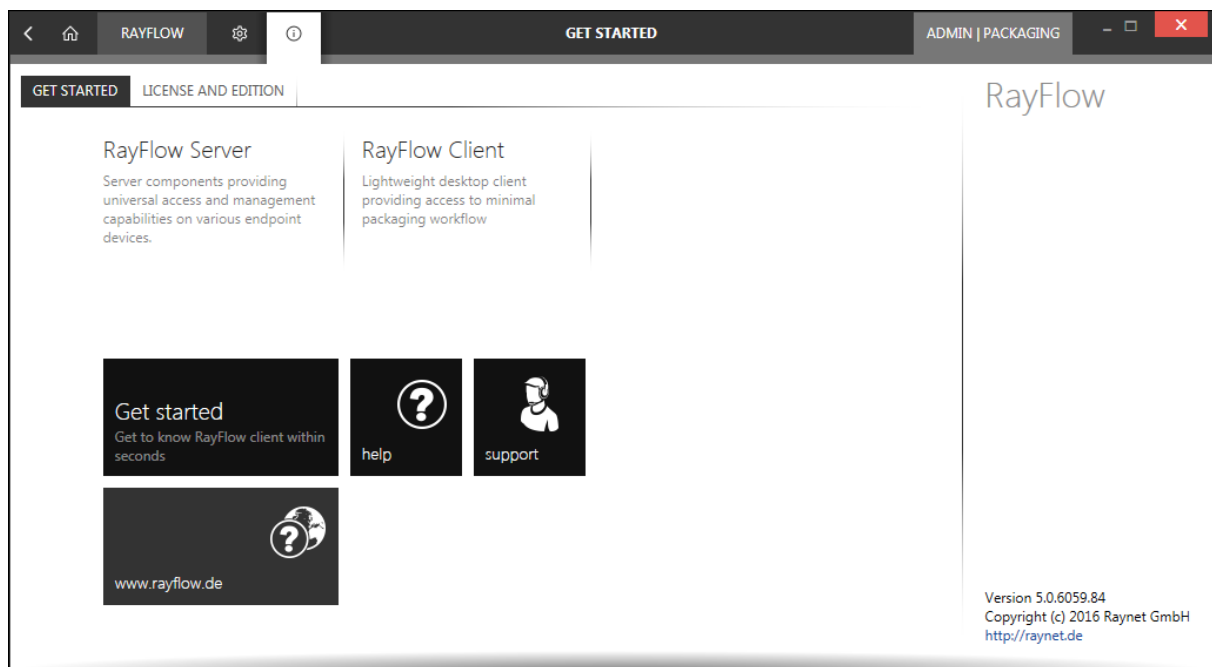
# About



Clicking on the **about** tile from the *Home Screen* displays the about area. It contains the *Get Started* view and the *License and Edition* view. The **Get Started** view contains information about the RayFlow Server and its Client and links to various online resources. The **License and Edition** view contains information about the currently used license and links to the license activation tool.

## Get Started

Choosing the **Get started** button from the **Home Screen** reveals this view in the **About** section. It contains information about the RayFlow Server and its Client and link to various online resources.



## Meet RayFlow

These are the two main components of the application server and desktop client. These components are based upon the standard server-client architecture.

## Resources

RayFlow Client includes various resources that can be used to make the experience with RayFlow Client more productive and provide help where needed. Please note that some resources are only available on-line or with an internet connection.

## **Get started**

This opens the get started help file, which includes tips & tricks how to configure and use RayFlow Client.

## **help**

Opens this document.

## **support**

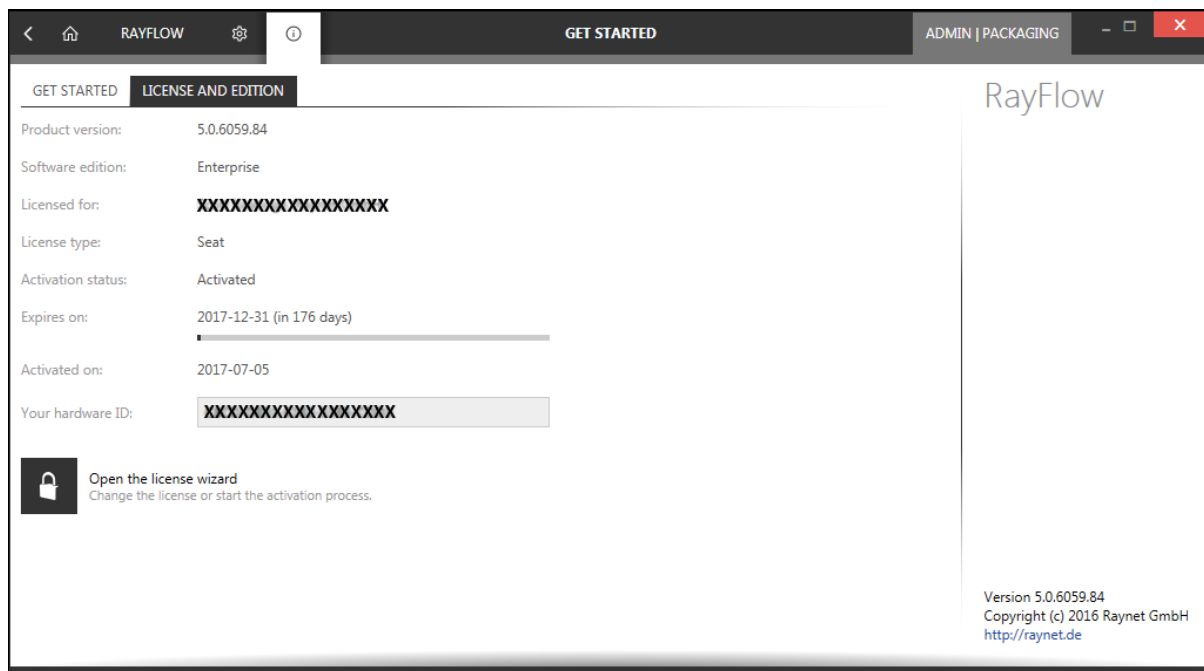
Opens the website for product support contact.

## **www.rayflow.de**

RayFlow Client on the web.

## License and Edition

This area contains the **LICENSE AND EDITION** view, providing all usage relevant information for the license used for the current product instance.

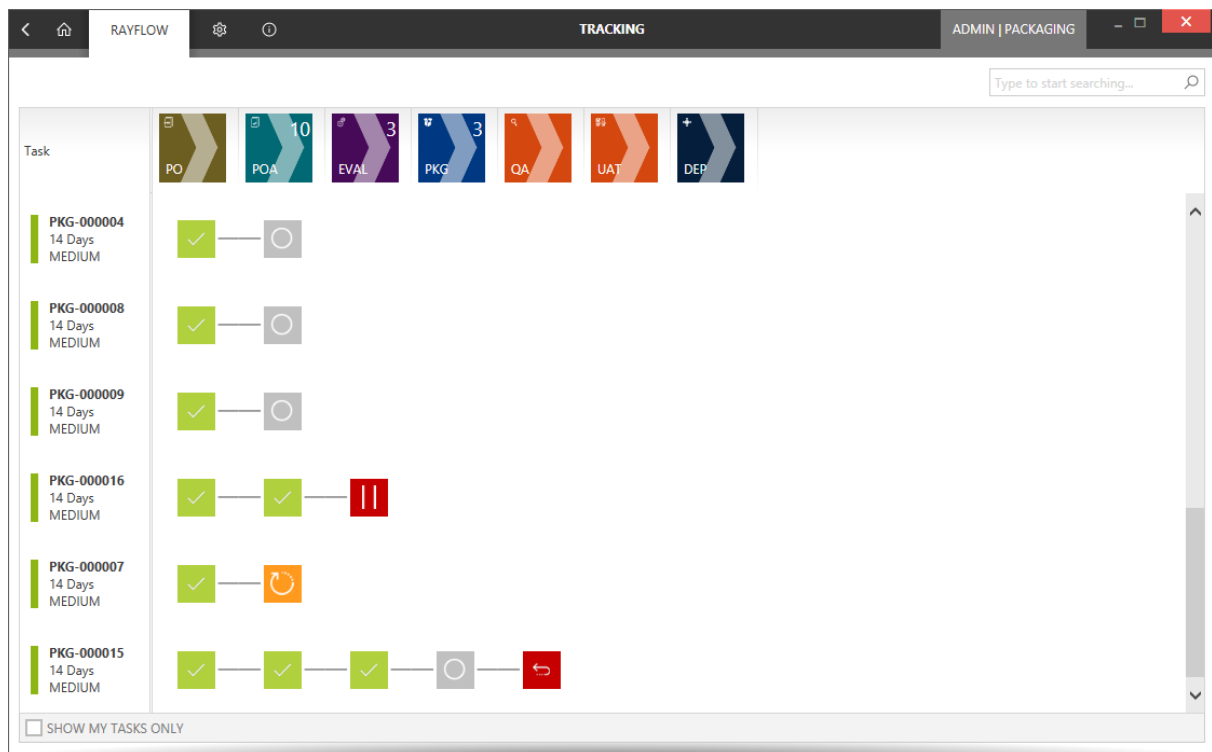


Some more information about the license will be shown when clicking on the **more details...** button. By clicking on the **Open the license wizard** button, the license can be changed. Clicking on this button will open the license activation tool. For more information on licensing, refer to the chapter *License Wizard* in this manual.

# Tracking

Tracking window in Rayflow is a feature-rich progress tracking functionality that enables a user to monitor a task's progress and status over time, through the defined phases in a workflow process.

## The Tracking View









The tracking window can primarily be divided into five major sections:

- **Tracking View:** Symbolically shows the progress and status of tasks through the phases of the project
- **Show my tasks only:** When this option is selected, the tracking view is automatically filtered to only show the tasks with are assigned to the logged in user
- **Package List:** Name and properties related of a package/task is listed in this section for tracking
- **Phases:** All the phases within a project are shown here and the tracking of tasks is done against them
- **Search:** Allows users to search packages/tasks from the package list and consequently show its tracking information in the tracking view

The progress of a task is shown using a graphical progress graph with icons representing the status of the task in a particular phase. Below is the list of status's associated with each icon:

Icon	Name	Short

	Finished	This phase is finished for this package
	Open	This Package is not yet in process (Status Open /New Tasks )
	Deleted	The package was cancelled
	Active	Package is active (Someone is working on it)
	Rejected	The package was sent back to a previous phase
	Hold	The process of the package was set on hold.

Furthermore, when the mouse is hovered over an individual icon, it shows the last person who worked on the task in the respective phase, time and last updated status. Also when an icon with a **Finished** and **Deleted** status is clicked upon, a dialog showing the history of status updates for the task is shown. When other status icons are clicked upon, the task is opened in the Tasks Window under its respective phase.

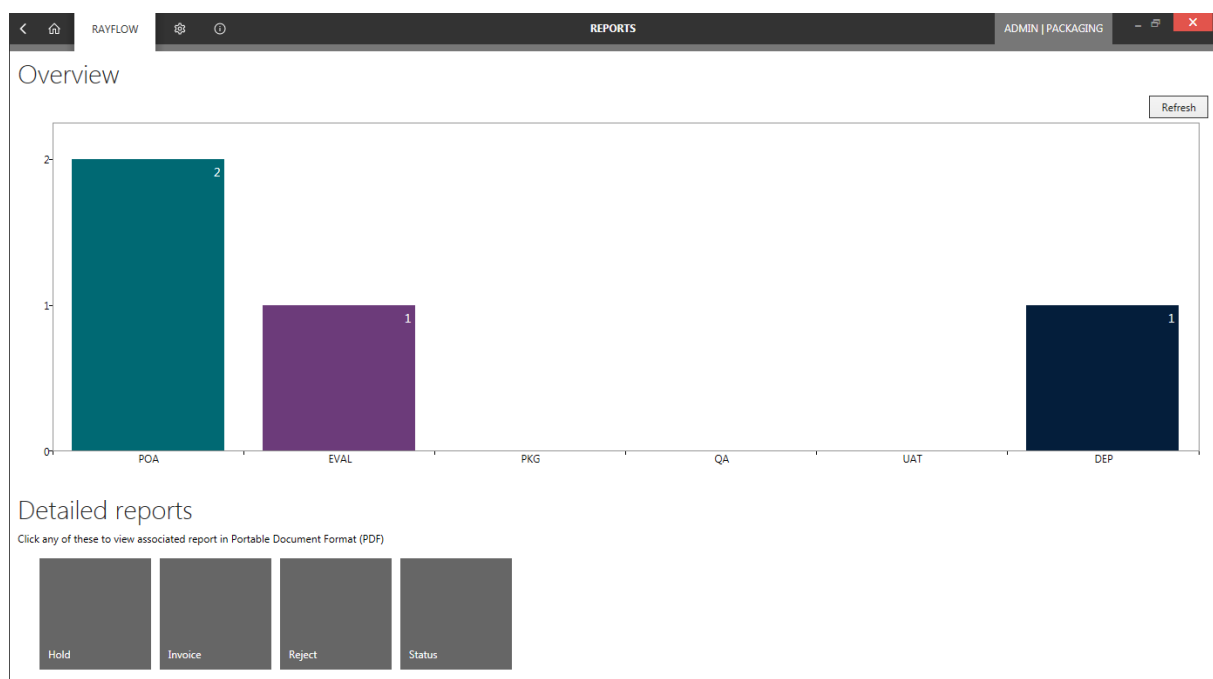
# Reports

The **Reports** window of the RayFlow client provides a formal account of the task's status and progress over the phases in workflow. This window is further divided into two sections: **OVERVIEW** and **DETAILED REPORTS**.

## Overview Reports

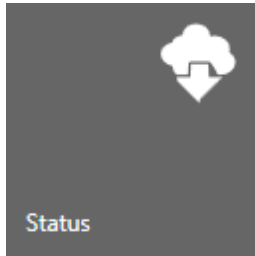
Overview section uses bar chart to show the number of tasks that are currently active in different phases. The bar chart on its horizontal axis shows the phases name and on its vertical axis show numbers, against which the graph is plotted. In addition, each bar representing the number of tasks in a phase, show that number in the top right corner or when the mouse is hovered above them.

Within the **phase configuration** section of RayFlow Web Interface, a user can set the color codes for the bars representing different phases. Furthermore, the Overview section comes with a **REFRESH** button which when clicked upon, updates the chart with current statistics from the server.



## Detailed Reports

The Detailed reports section, contain reports in PDF format. A user can add or remove crystal/SSRS reports via the **Reports** page of RayFlow web client. A user directly can access these reports via the RayFlow client in .pdf format. Additionally, when a user hovers mouse over each of the report tiles, a download icon is displayed. Clicking on the icon will download the report to the selected location.

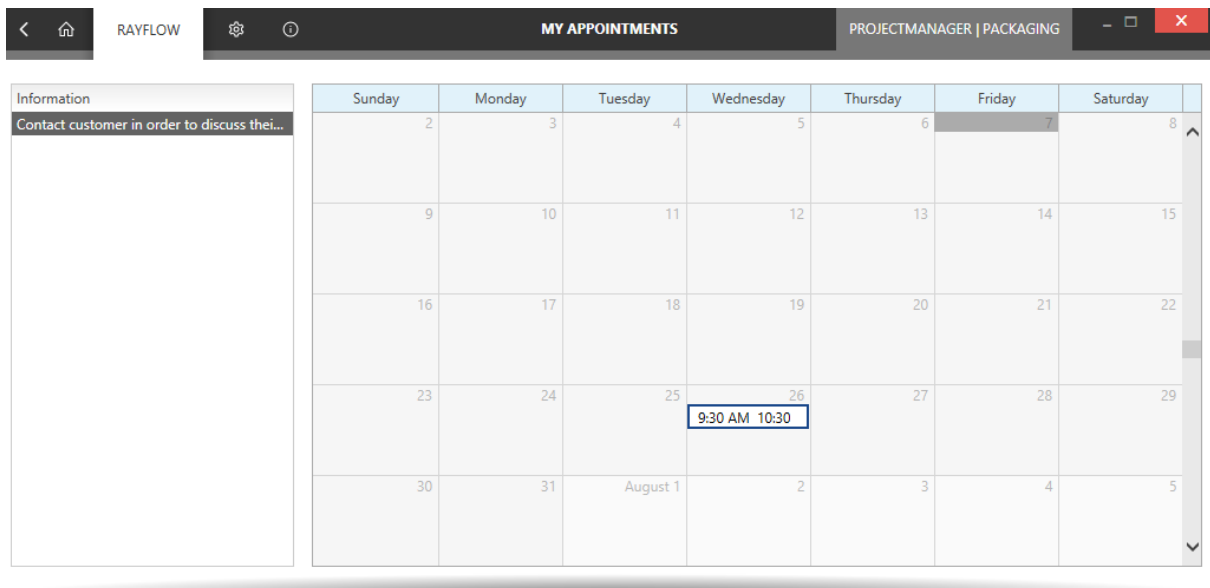


Depending upon the information source and criteria specified while creating the reports, it can provide its users a wide range of useful information related to the project.

# My Appointments

**My Appointments** view, shows all the appointments of the currently logged in user. This view can be accessed via the my appointments tile on the RayFlow Dashboard. This view is divided into two sections: Information and Calendar.

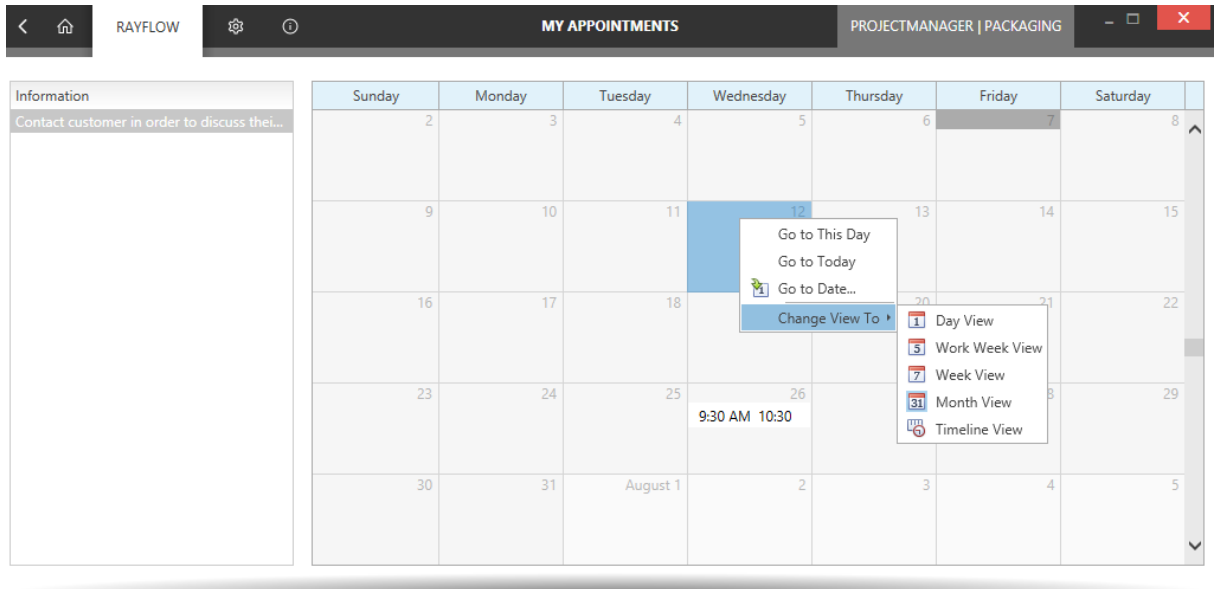
The information section lists the information related to the scheduled appointment and the calendar view shows the appointment schedule with respect to the time line.



Information	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Contact customer in order to discuss thei...	2	3	4	5	6	7	8
	9	10	11	12	13	14	15
	16	17	18	19	20	21	22
	23	24	25	26 9:30 AM 10:30	27	28	29
	30	31	August 1	2	3	4	5

## Updating the Calendar View

A user can change between different calendar views by selecting options from the calendar context menu. This context menu is available when a user right clicks upon the **Calendar** view. Options that are currently available include: Day, Week, Work Week, Month, and Timeline view.



Information

Contact customer in order to discuss thei...

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	August 1	2	3	4	5

9:30 AM 10:30

- Go to This Day
- Go to Today
- Go to Date...
- Change View To
  - Day View
  - Work Week View
  - Week View
  - Month View
  - Timeline View

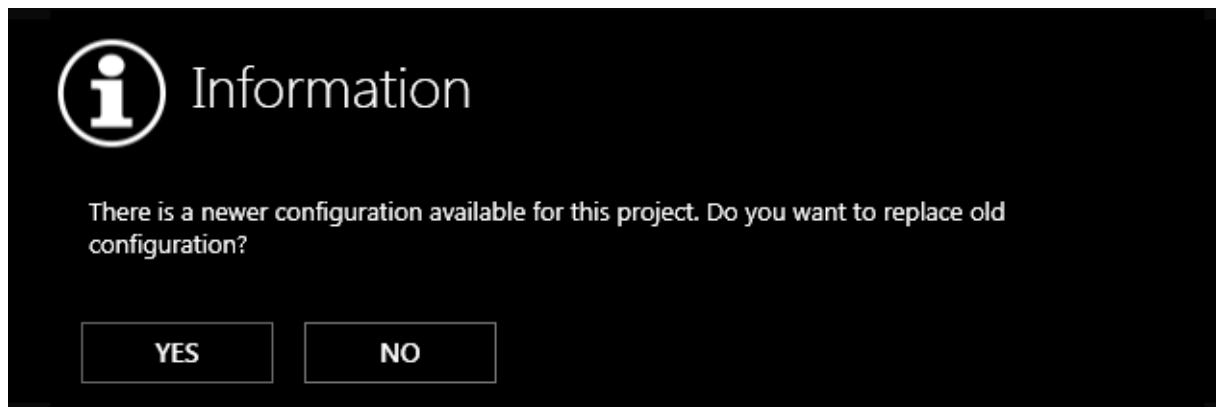
For more information on how to create a new appointment, please refer to the *Appointments* section of the Task Window chapter.

# Configuration

The RayFlow client stores the configuration in the `RayFlowConfiguration.xml` file. This file is located in the AppData Folder `AppData\Roaming\RayNet\RayFlow`. Each of the individual projects is assigned a unique Project Id and Configuration Id.

```
<Configuration>
  <Projects>
    <Project Id="2f649c98-c7a3-4cab-8a06-8a1ef0b49277" ConfigurationId="A6EC15A828098C84C248A0E6081C07511DAF8CE5C42F430BBB74DB141785C591" Name="" PackagePath="df857f59-01a0-4f18-a27e-290cde7e3b0e">
      <Tasks>
        <Task Name="PO" Id="56cd1711-a7d2-447c-9b9a-6cf92c5ebf8d" Type="Order" Picture="" Color="" />
        <Task Name="POA" Id="d1c87f05-eb7e-455a-9b38-d8b1812a76c8" Type="Default" Picture="" Color="" />
        <Tools>
          <Tool Id="63ea7e53-cd9a-4427-8053-2dfd8b5da753" ShortName="RayQC" FullName="RayQC" Description="QC" ShowInFlow="1" Wait="0" ShowInContextMenu="1" NoWindow="0"/>
        </Tools>
      </Task>
      <Task Name="EVAL" Id="de70487d-c08a-452b-8014-f97a779e63f4" Type="Default" Picture="" Color="" />
      <Task Name="PKG" Id="26fa9c5b-2183-4aa5-aeb6-b1a7c564e3a" Type="Default" Picture="" Color="" />
      <Task Name="QA" Id="ab633616-e8ea-4979-b906-d937fac2cf42" Type="Default" Picture="" Color="" />
      <Task Name="DRP" Id="41d4aa04-aa2f-4db3-b6c8-79bb55aca5db" Type="Default" Picture="" Color="" />
      <Task Name="UAT" Id="d075b0b7-ae37-4896-87c8-7cabb61b9a84" Type="Default" Picture="" Color="" />
      <Task Name="COD" Id="a8d39d00-d9aa-4812-8106-281de83ef56f" Type="Default" Picture="" Color="" />
    </Tasks>
  </Project>
  <Project Id="7c21b316-3932-410c-b9db-406ef246d7c7" ConfigurationId="68358737452C479247E12BF0B3396B86DCBFD6A393143AD2E119CA63D18C14" Name="" PackagePath="77c2169b-e3d1-4953-a2c0-aaef0c45e979">
  </Project>
  <Project Id="4f1b38a8-d8e1-4f5c-b74a-be0744d2ffdd" ConfigurationId="5316069932207933C35DBDF339405133EF19672BE15F0133240E8CB318D2F" Name="" PackagePath="1979a0d2-9fdb-43a4-8ec3-36ef12875c65">
  </Project>
  <Project Id="b44dd9d3-0d8f-4fc9-ae20-e3a810c0db48" ConfigurationId="69F44807C437550C4BAE4A5D72F5B8C24C60A6C233DE47D9D4FB00004A8A50EC2" Name="" PackagePath="09b8a166-540b-497d-8262-c02a31e0b9d9">
  </Project>
  <Project Id="13979cc3-b0d6-44ea-9bf6-0efc1720ade7" ConfigurationId="53E76D50460ADF2C25B336DE8EF9F9D3A3E6FF8FCA51ACB3AE36BE2DE8AD86" Name="" PackagePath="26b98c85-4689-431a-bfcd-71f95ce8fd42">
  </Project>
</Projects>
</Configuration>
```

When a project is loaded on the client, the client checks the configuration id of the project on the server, and if changed downloads the new configuration and updates the project.



## Dashboard Configuration

The RayFlow Dashboard consists of XML based tiles, providing access to both dynamically updated key figures and quick links to underlying content. The entire configuration related to the dashboard is stored in the `dashboard.xml` file, located in the RayFlow installation directory. A user can edit this `.xml` file in a text editor and add new tiles to the dashboard.

### Syntax:

<Tile>

#### Tile Properties

</Tile>

### Properties:

Property	Description
<b>BUTTON.COLOR</b>	Sets the color of the tile. The property takes any valid XAML-markup color as value
<b>BUTTON.CLICK</b>	<p>Defines what happens when a tile is clicked upon.</p> <p>[@abc.def.ghi] : opens snapin with id abc.def.ghi</p> <p>[@abc.def.ghi/thepath] : opens snapin with id abc.def.ghi, path "thepath"</p> <p>[@abc.def.ghi?args] : opens snapin with id abc.def.ghi and passes arguments "args"</p> <p>[@abc.def.ghi/thepath?args] : opens snapin with id abc.def.ghi, path "thepath" and passes arguments "args"</p> <p>Any other string (for example notepad.exe) starts this application (if the file exists)</p>
<b>BUTTON.SIZE</b>	<p>Sets the size of the tile:</p> <p>Small: 128 x 128 px</p> <p>Large: 266 x 128 px</p> <p>ExtraLarge: 266px x 266 px</p>
<b>TEXT.SIZE</b>	<p>Sets the size of the text appearing on the tile</p> <p>Small: Small text to be used with small tiles</p> <p>Large: Little bit larger to display larger texts</p> <p>ExtraLarge: Used to display big numbers in tiles</p>
<b>TEXT.POSITION</b>	<p>Set the position of the text within the tile</p> <p>TopLeft</p> <p>TopCenter</p> <p>TopRight</p> <p>CenterLeft</p> <p>Center</p> <p>CenterRight</p>

	BottomLeft BottomCenter BottomRight
<b>TEXT.MARGIN</b>	Any valid XAML-markup Thickness For example 0,0,10,2 or 0 2 3 4 or 0 2 or 5 etc.
<b>TEXT.INNERXML</b>	The text to be displayed. May contain special formatting:  [@abc.def.ghi]:Gets value from data provider abc.def.ghi  [#abc]: Gets localizes resource abc  any other string :Displays the string
<b>CHART.SIZE</b>	Small: 128 x 128 px  Large: 266 x 128 px  ExtraLarge: 266px x 266px
<b>CHART.TYPE</b>	Pie  Bars  BarsStacked  Columns  ColumnsStacked
<b>CHART.CLICK</b>	[@abc.def.ghi]: opens snapin with id abc.def.ghi  [@abc.def.ghi/thepath]:opens snapin with id abc.def.ghi, path "thepath"  [@abc.def.ghi?args]: opens snapin with id abc.def.ghi and passes arguments "args"  [@abc.def.ghi/thepath?args]: opens snapin with id abc.def.ghi, path "thepath" and passes arguments "args"  Any other string (for example notepad.exe) starts this application (if file exists)
<b>CHART.SOURCE</b>	abc.def.ghi: Loads the data from data provider

	abc.def.ghi
--	-------------

**Example:**

```
<Tile
    Size="Small"
    Color="#ff07BBF0"
    Click="Rayflow.Reports">
    <Icon Position="TopLeft" Margin="0">Resources\tileReports.png</Icon>
    <Text Position="BottomRight" Size="Large">reports</Text>
</Tile>
```

## Proxy Configuration

RayFlow client communicates with the RayFlow Server over HTTP(S) protocol. In case, the client has been installed in a separate network than the server, it would require an internet connection to work. For environments, where the communication to the outside is filtered via a proxy server, the proxy address has to be provided in the `RayFlow.exe.config` file.

The image below shows how and where to add this information in the file, for client to successfully establish the connection to the RayFlow server:

```
<?xml version="1.0" encoding="utf-8"?>
<configuration>
  <configSections>
  </configSections>
  <runtime>
  </runtime>
  <startup>
  </startup>
  <applicationSettings>
  </applicationSettings>
  <log4net>
  </log4net>
  <system.net>
    <defaultProxy enabled="true">
      <proxy proxyaddress="http://12.3.123.123:8080"/>
    </defaultProxy>
  </system.net>
</configuration>
```

# Troubleshooting

The following section gives a list of typical issues users may have to face whilst working with RayFlow Client. Since some of them may easily be solved, it is highly recommended to review this section before the product support is contacted. Please refer to the RaySuite Knowledge Base as well, since it contains information about current Known Issues and additional hints on handy solutions and procedures regarding working with RayFlow Client.

## License Activation Tool is Shown at RayFlow Client Launch

The License Activation Tool is invoked whenever RayFlow Client is launched without a valid license in place. Therefore, if users cannot run RayFlow Client but always get the License Activation Tool instead, there must be an issue with the current licensing status of the RayFlow Client application. In order to check the license status, please follow the steps outlined below.

Make sure to have your original RayFlow Client order number at hand. It has been delivered along with the RayFlow Client resources handed over to you for productive usage or validation purposes. Since the license checkup may include steps that require product activation, it is required to have the order number. Additionally, a machine with internet connection (for online activation or support driven activation via mail) has to be within reach as well if the machine RayFlow Client is running on does not have access to the internet itself.

1. Open the RayFlow Client application installation directory (e. g. `C:\Program Files (x86)\RayFlowClient\`) and check the existence of a `*.license` file.
  - a. If a `.license` file is in place, move it from this directory to another one (or simply rename its file extension from "license" to "license\_") and try to launch RayFlow Client again.

**Note:**

Moving or renaming the old `.license` file allows you to restore it later, or to send it to the support team in case of more complex issues. Please do not delete the old `.license` file before the RayFlow Client application runs as expected.

2. Once the file is no longer in place, or if there has not been a `.license` file at all, the expected result is the launch of the License Activation Tool.
3. Click on the "I have my order number" button and enter your data as demanded. For details on how to accomplish that, please refer to the *Get Started Guide* that has been provided along with your RayFlow Client installer resources.
4. Activate the product either by using the online activation via web-service, or by using our [Support Panel](#). If your activation data is complete and valid, the result depends on the activation method used: Either the web-service initiates the automated creation of a new `.license` file within the application installation directory, or the support team will reply and send a `.license` file you have to copy to the application installation directory

manually.

5. Either way, if the activation routine was executed successfully, you should have a new `.license` file within the application installation directory, and RayFlow Client should launch as expected when the product's executable file is run.

If the issue is not solved by the steps named above, it is recommended to contact the Raynet support team via our [Support Panel](#).

## Logging RayFlow Client Activity Fails

RayFlow Client usually logs system activity in a file called `RayFlow Client.log`, which is stored within the local application data directory (e. g., `%APPDATA%`).

There may be reasons that prevent the log from being written. Please follow the steps described below in order to eliminate the most likely reasons for logging issues:

### Change Log File Location

By default the log file location for RayFlow Client is set to `%APPDATA%\Raynet\RayFlow\Logs`. To change the target log location:

1. Navigate to the RayFlow Client application root directory, and open the `RayFlow.exe` config file. (e. g., `C:\Program Files (x86)\RayFlowClient\RayFlow.exe.config`)
2. Search for the `file` tag and check the given value. By default it is set to `%property{LogDirectory}\RayFlow.log`.
3. Replace the value with the desired target location.

### The Target Log File Location is Not Accessible for the Current User

To check whether the currently logged in windows user profile has sufficient access to the log file location:

1. Navigate to the RayFlow Client application root directory, and open the `RayFlow.exe` config file. (e. g., `C:\Program Files (x86)\RayFlowClient\RayFlow.exe.config`)
2. Search for the `file` tag and read file name given as `value` attribute.
  - If it is a file name, such as the default value `RayFlow Client.log`.
  - If it is a relative path definition, the file is created relative to the application root directory.
  - If it is an absolute path, the file is created exactly at the specified location.

- If it is empty - note the path to a location that is accessible for the currently logged in windows user profile and save the changed config file state
3. Browse to the specified location:
    - If the directories named within the path do not exist physically: create them.
    - If the directories named within the path actually do exist, check their security settings (right-click > properties > security > [current user] and make sure that the currently logged in user has writing access to the log file folder. (Ask your RaySuite system administrator for support if security settings are restricted as well.)
  4. Close and re-open RayFlow Client. Login and load any RayFlow project.
  5. A log file should have been created within the target log file location by now.

## The Target Log File Location Directory Does Not Exist

1. Please follow the instructions given above to make sure local and static locations are given correctly within the config file. Other possible locations for the log file creation may reside as a shared network location.
2. Try to copy the path into a windows explorer address bar to open the specified target address.
  - If the location is not available, there may be issues such as type errors, changed network shares or temporary network provision issues. Please adjust the path to a local destination as long as the network share is not available.
  - If the location is available, make sure that there are sufficient writing access permissions for the required windows user profile given.
  - If the location is accessible, make sure that there is enough free disk space for log file maintenance.
3. Try to create an arbitrary file at the specified target location (e. g., `MyTextFile.txt`).
  - If an error message is displayed, fix the mentioned issues and re-try.
4. Close and re-open RayFlow Client. Login and load any RayFlow project.
5. A log file should have been created within the target log file location by now.

## The Log File Is There, But Nothing is Written into It

1. Navigate to the RayFlow Client application root directory, and open the `C:\Program Files (x86)\RayFlowClient\RayFlow.exe.config` file
2. Search for the `maximumFileSize` tag and check the given value. It has to be a full number followed by either "KB", "MB" or "GB" (without blank space in between).
3. Set the value to "2048KB"
4. Additionally, search for the `level` tag and check the given value. If it is set to OFF, logging is actually deactivated. Set the value to DEBUG.
5. Close and re-open RayFlow Client. Login and load any RayFlow project.
6. The log file should have been extended with new messages by now.

## The Log File Is Overloaded with Information

1. Navigate to the RayFlow Client application root directory, and open the file `C:\Program Files (x86)\RayFlowClient\RayFlow.exe.config`
2. Search for the `level` tag and check the given value. Set it to ERROR to reduce the number of lines that are written to the log file.
3. Additionally, review the layout type definition(s). Edit the pattern to reduce the information written for each line of the log file. Please refer to the log4net online documentation for further details on how to accomplish this task.
4. Delete the existing log file, close and re-open RayFlow Client. Login and load any RayFlow project.
5. The log file content should have been adjusted to match the newly defined settings by now.

## Changes to the Log Configuration File Cannot be Saved.

On systems where UAC is activated, there may be issues with writing to files which reside within the Windows Program Files directory. A simple workaround for these issues is to copy the file to a location where writing is allowed, execute and save the changes there, and finally copy the manipulated file back to the original location.

In most cases this should suffice. If this solution does not work, contacting the system administrator is due.

If all of the typical issues named above are reviewed and eliminated as possible issue reasons, please contact your RaySuite / RayFlow Client system administrator, or contact the Raynet support team via our [Support Panel](#) for further advice.

# Contact Details

Raynet GmbH is an innovative, technology orientated service and product company, specialized in the execution and the management of IT projects.

The focus of our attention is system- and software management, software packaging, migration and client engineering.

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For any support demand, information request or bugs do not hesitate and open a ticket using our [Support Panel](#).

Also name us the person of contact in your company considering all RayFlow topics including his or her mail address.

We will send current updates of this document and other free rayflow information to this address then.



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