

jeylabs
Digital Transformation Specialists

PowerToolz Workflow Converter

Quick Start Guide

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Quick Start Guide

What you will need:

Required

To follow the installation portion of the guide, it is required to have the PowerToolz Workflow Converter installation file. If you already have installed PowerToolz you will need access to workstation which has access to K2 environment.

Important Notes

- The guide is always written to the latest PowerToolz Workflow Converter version. It is recommended to use PowerToolz Workflow Converter 5.4.0.0 when following this quick start guide, so that it will ensure all features and screen captures are relevant.
- Evaluation license for PowerToolz Workflow Converter will not allow the user to save the converted workflow, however you will be able to see the analysis conversion report.

Installing PowerToolz Workflow Converter

Prerequisites

- The user should have Administrator permission to the K2 server
- The tool can be installed on a machine with access to K2 Database and **K2 5.3 server and above**
- K2 Five must be installed for PowerToolz Workflow Converter to be used
- .NET Framework 4.8 or later is required on the computer where the user wants to install PowerToolz Workflow Converter
- PowerToolz Workflow Converter is compatible with Windows 8.1, Windows 10, Windows Server 2012, Windows Server 2012 R2 and Windows Server 2016.

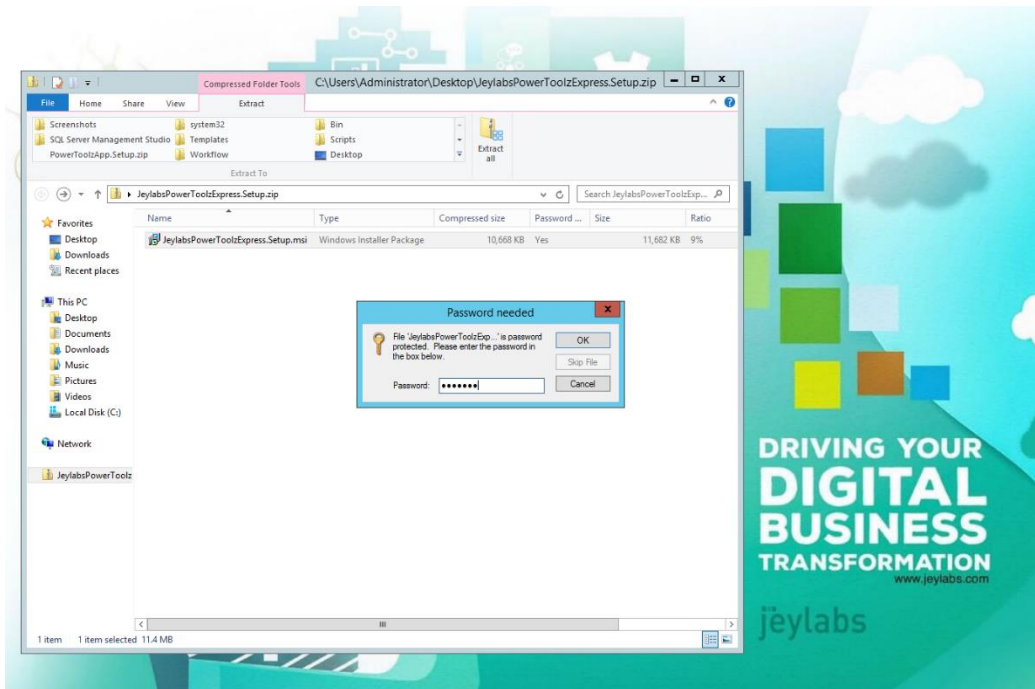
Licensing

- jeylabs will generate a license key based on the product key emailed to powertoolz@jeylabs.com.au
- License Key is given per machine

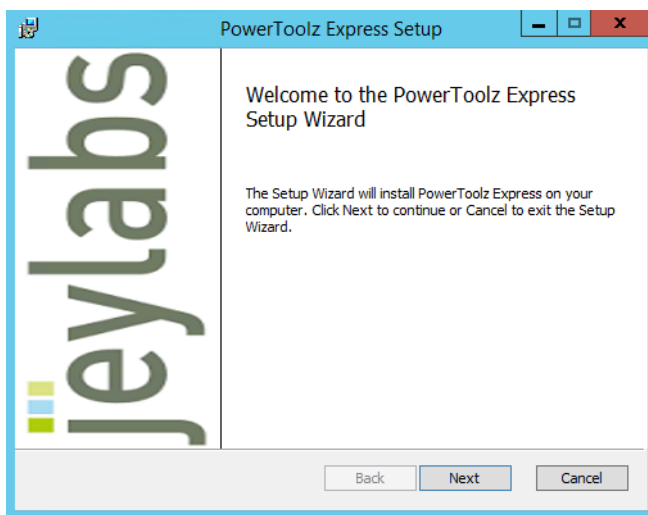
Installation

Step by Step Guide

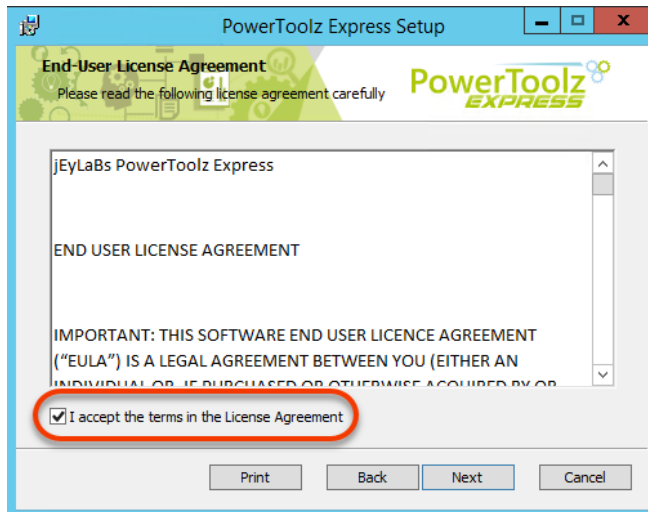
1. You will be provided with a download link to the PowerToolz Workflow Converter installation file by jeylabs. Once the file has been downloaded and extracted, run the installation file as an Administrator and when prompted for password enter '**jeylabs**'.



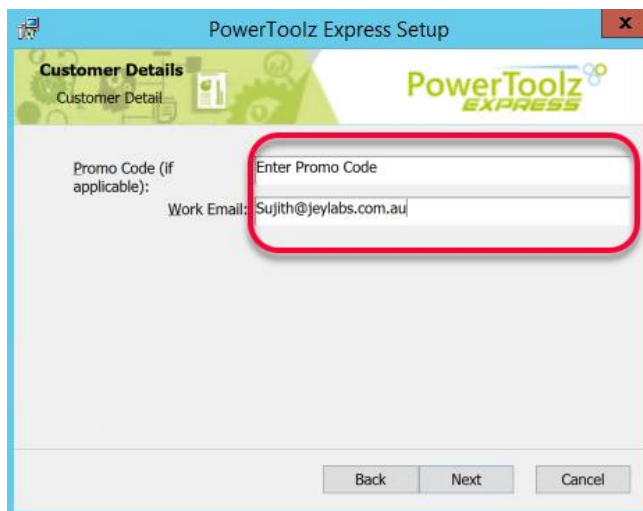
2. The Installation setup screen will appear once the password has been entered, press '**Next**' button to continue.



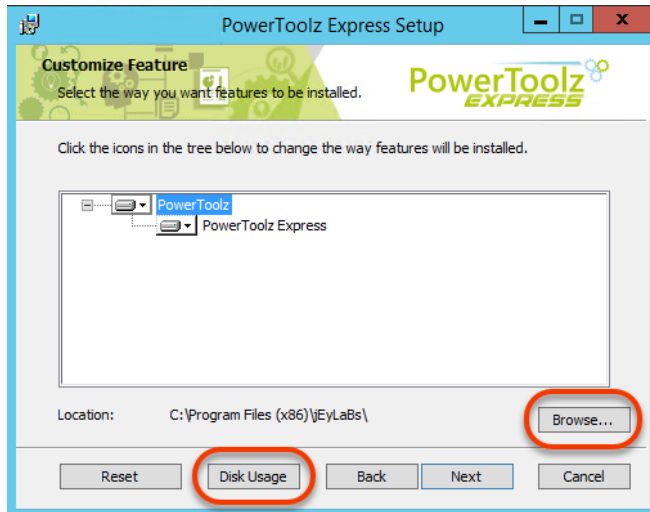
- Accept the license agreement on the EULA screen and press '**Next**' button to continue.



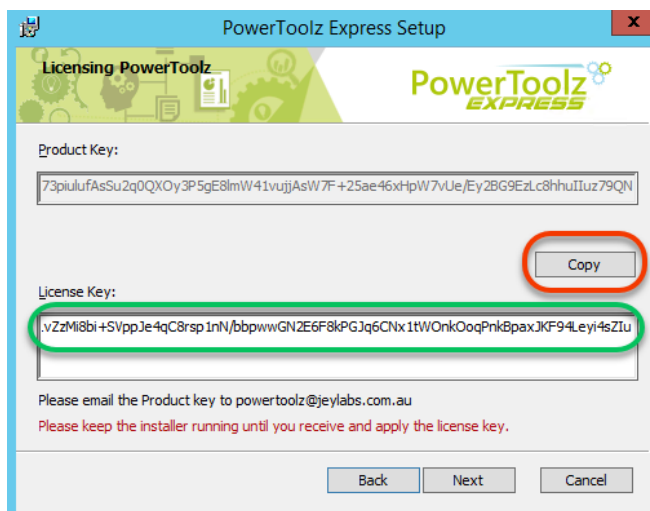
- Enter your email where labeled '**Work Email**', If you have '**Promo Code**' enter in the display box else click '**Next**' button to continue.



- The customize feature screen will allow the user to select the feature that you would like to install, by default all features are selected. You can also use the '**Browse**' button to change the designated install location and '**Disk Usage**' button gives you the option to select storage drives for PowerToolz Workflow Converter. Once you have finalized your configuration click '**Next**' button to continue.



- On the Licensing PowerToolz screen click '**Copy**' button to copy the product key. Email the copied product key to powertoolz@jeylabs.com.au to receive the license key. Once license key has been sent to you, copy the key and paste it on to the display box and press '**Tab**' key on the keyboard to enable the '**Next**' button and click to continue.



- Here you will need to enter your K2 Server details, once entered click '**Next**' to continue.

PowerToolz Express Setup

K2 Server Detail
Please provide the K2 Server detail.

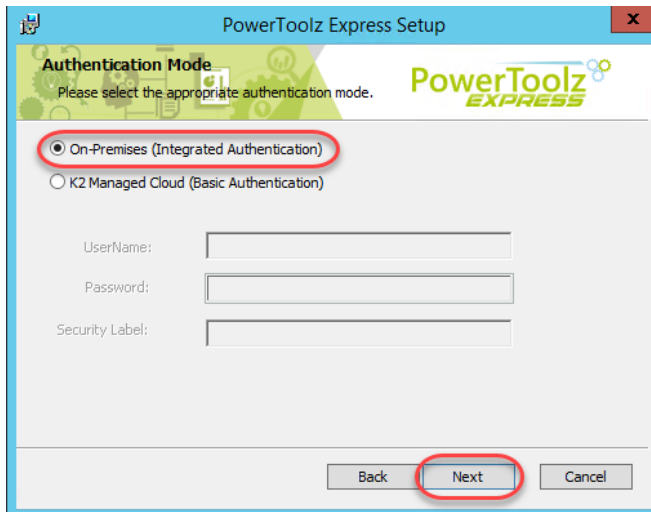
Server Name:

Host Service Port:

Workflow Service Port:

K2 Designer Url:

8. Select the necessary authentication mode using the radio button. Fill in the correct details required if basic authentication is selected. Click '**Next**' to continue.



PowerToolz Express Setup

Authentication Mode
Please select the appropriate authentication mode.

☒ On-Premises (Integrated Authentication)

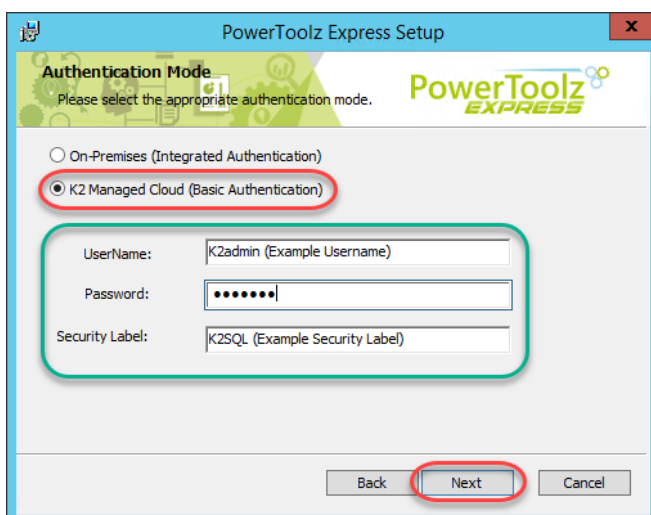
☐ K2 Managed Cloud (Basic Authentication)

UserName:

Password:

Security Label:

Back **Next** Cancel



PowerToolz Express Setup

Authentication Mode
Please select the appropriate authentication mode.

☐ On-Premises (Integrated Authentication)

☒ K2 Managed Cloud (Basic Authentication)

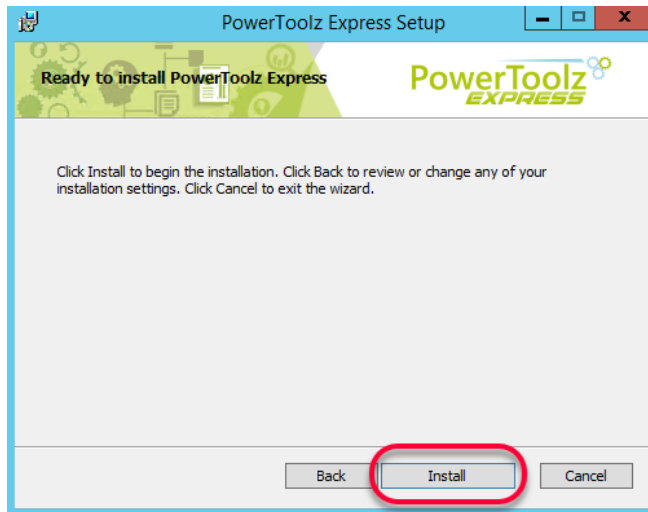
UserName:

Password:

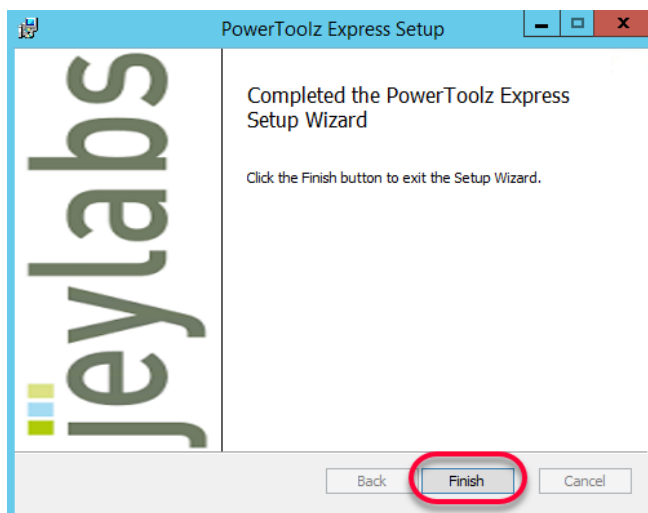
Security Label:

Back **Next** Cancel

9. Click **'Install'** to run the installation process.



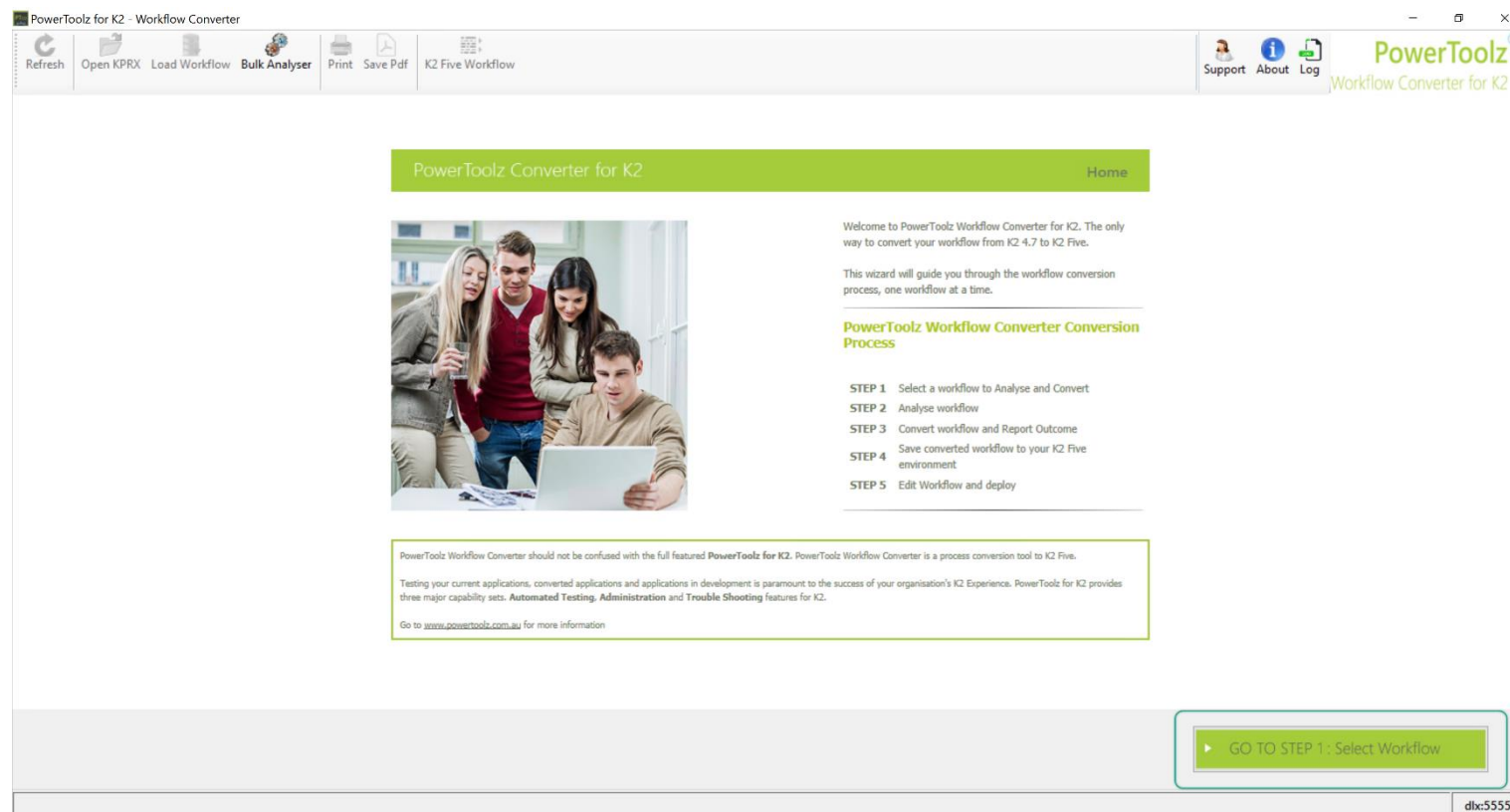
10. Click **'Finish'** to end the installation.



PowerToolz Workflow Converter

Workflow Conversion Process

1. Image below shows you the home screen for PowerToolz Workflow Converter, click the '**GO TO STEP 1**' button to begin.



2. a. Select a workflow to convert by selecting one of the category folder on the left.

PowerToolz for K2 - Workflow Converter

Step 1 of 5: Select a Workflow to Analyse and Convert

1. Select Process | 2. Analysis Report | 3. Workflow Conversion | 4. Conversion Report & Save | 5. Complete

Process Name	Last Used Date	Number of In...	Process Id	Process Set Id	Default Version	Modified By
com.K2.App						
com.K2.System.AppWizard						
Framework Core						
Framework Extension						
Portal Company Announcement						
Portal Customer Service Task						
Portal Employee Suggestion Box						
Portal Leave Request						
Portal Policy Review						
workflow						
AdHocTaskManagement.Workflow.Approval	2	2	1	K2:DENALLIX\Administrator
CapitalExpenditure.Workflow.Approval	3	3	1	K2:DENALLIX\Administrator
ChangeManagementRequest.Workflow.Appro...	4	4	1	K2:DENALLIX\Administrator
CorporateCommunication.Workflow.Acknowle...	6	6	1	K2:DENALLIX\Administrator
CorporateCommunication.Workflow.Response...	5	5	1	K2:DENALLIX\Administrator
DefectTracking.Workflow.Approval	7	7	1	K2:DENALLIX\Administrator
DistributionList.Workflow.Approval	19	19	1	K2:DENALLIX\Administrator
DocumentReview.Workflow.Approval	8	8	1	K2:DENALLIX\Administrator
EmployeeSelfService.Workflow.Approval	10	10	1	K2:DENALLIX\Administrator
EventPlanning.Workflow.Approval	11	11	1	K2:DENALLIX\Administrator
ExpenseClaim.Workflow.Approval	12	12	1	K2:DENALLIX\Administrator
FAQReview.Workflow.Approval	13	13	1	K2:DENALLIX\Administrator
Framework.Workflow.Reference	1	1	1	K2:DENALLIX\Administrator
HRJobPosting.Workflow.Approval	17	17	1	K2:DENALLIX\Administrator
ITAssetRequest.Workflow.Approval	14	14	1	K2:DENALLIX\Administrator
ITIssueReport.Workflow.Resolution	15	15	1	K2:DENALLIX\Administrator
ITServiceRequest.Workflow.Approval	16	16	1	K2:DENALLIX\Administrator
LeaveRequest.Workflow.Approval	18	18	1	K2:DENALLIX\Administrator
MeetingRequest.Workflow.Execute	21	21	1	K2:DENALLIX\Administrator
NewIdeaSubmission.Workflow.Approval	20	20	1	K2:DENALLIX\Administrator
OffboardEmployee.Workflow.Process	9	9	1	K2:DENALLIX\Administrator
PressReleaseReview.Workflow.Approval	22	22	1	K2:DENALLIX\Administrator
SocialMediaPostReview.Workflow.Approval	23	23	1	K2:DENALLIX\Administrator

☐ Skip Analyse

dlw:5555

- The selected process will be shown in display panel below the process list. Click '**GO TO STEP 2**' button to continue, if you want to skip the analysis step check the "**Skip Analysis**" checkbox and click on "**GO TO STEP 3**".

PowerToolz for K2 - Workflow Converter

Refresh Open KPRX Load Workflow Bulk Analyser Print Save Pdf K2 Five Workflow

Support About Log PowerToolz Workflow Converter for K2

Workflow Converter for K2 Step 1 of 5: Select a Workflow to Analyse and Convert

1. Select Process 2. Analysis Report 3. Workflow Conversion 4. Conversion Report & Save 5. Complete

Process Name	Last Used Date	Number of In...	Process Id	Process Set Id	Default Version	Modified By
AdHocTaskManagement.Workflow.Approval	2	2	1	K2:DENALLIX\Administrator
CapitalExpenditure.Workflow.Approval	3	3	1	K2:DENALLIX\Administrator
ChangeManagementRequest.Workflow.Appro...	4	4	1	K2:DENALLIX\Administrator
CorporateCommunication.Workflow.Acknowledge...	6	6	1	K2:DENALLIX\Administrator
CorporateCommunication.Workflow.Response...	5	5	1	K2:DENALLIX\Administrator
DefectTracking.Workflow.Approval	7	7	1	K2:DENALLIX\Administrator
DistributionList.Workflow.Approval	19	19	1	K2:DENALLIX\Administrator

Query Responses

Review Communication Results

Submit For Publication

Respond To Corporate Communication (..)

Cancel Communication

Query Responses

Summarize Communication Outcome

Complete

Cancelled

Communication Concluded

Initialize Query Responses

☐ Skip Analyse ☐ Ignore Environment Dependency Check

GO TO STEP 2 : Analysis Report

dlx:5555

PowerToolz for K2 - Workflow Converter

Refresh Open KPRX Load Workflow Bulk Analyser Print Save Pdf K2 Five Workflow Support About Log PowerToolz Workflow Converter for K2

Workflow Converter for K2

Step 1 of 5: Select a Workflow to Analyse and Convert

1. Select Process 2. Analysis Report 3. Workflow Conversion 4. Conversion Report & Save 5. Complete

Process Name	Last Used Date	Number of In...	Process Id	Process Set Id	Default Version	Modified By
AdHocTaskManagement.Workflow.Approval	2	2	1	K2:DENALLIX\Administrator
CapitalExpenditure.Workflow.Approval	3	3	1	K2:DENALLIX\Administrator
ChangeManagementRequest.Workflow.Appro...	4	4	1	K2:DENALLIX\Administrator
CorporateCommunication.Workflow.Acknowle...	6	6	1	K2:DENALLIX\Administrator
CorporateCommunication.Workflow.Response...	5	5	1	K2:DENALLIX\Administrator
DefectTracking.Workflow.Approval	7	7	1	K2:DENALLIX\Administrator
DistributionList.Workflow.Approval	19	19	1	K2:DENALLIX\Administrator

com.K2.App
com.K2.System.AppWizard
Framework Core
Framework Extension
Portal Company Announcement
Portal Customer Service Task

```

graph TD
    Review[Review Communication Results] -- Query Responses --> Query[Query Responses]
    Review -- Submit For Publication --> Summarize[Summarize Communication Outcome]
    Review -- Cancel Communication --> Respond[Respond To Corporate Communication (...)]
    Query --> Init[Initialize Query Responses]
    Summarize -- Complete --> Concluded[Communication Concluded]
    Respond --> Cancelled[Cancelled]
    Init --> Concluded
    Concluded --> Respond
  
```

☒ Skip Analyse GO TO STEP 3 : Convert Workflow

dlx:5555

4. The Analyze screen highlights the percentage conversion of the workflow selected previously and indicates what sections can be converted to the new K2 Five workflow. The '**Target**' column gives you a short explanation for the activity. Click '**GO TO STEP 3**' button to continue.
 - Green – Successfully converted
 - Orange – Reconfiguration needed after conversion
 - Red – Cannot be converted (placeholder will be substituted for the activity)

The screenshot displays the 'PowerToolz for K2 - Workflow Converter' application. The top navigation bar includes buttons for Refresh, Open KPRX, Load Workflow, Bulk Analyzer, Print, Save Pdf, and K2 Five Workflow. The main header shows 'Workflow Converter for K2' and 'Step 2 of 5: Analysis Report'. A progress bar indicates the current step is '2. Analysis Report', with previous steps being '1. Select Process', '3. Workflow Conversion', '4. Conversion Report & Save', and '5. Complete'.

The main content area is titled 'Conversion Analysis Report for : CorporateCommunication.Workflow.Acknowledgement'. It provides a summary: '71.7% of the process will be converted, 24.53% will be partially converted and 3.77% will not be converted. The remaining processes are highlighted below and will need to be manually updated. Place holders will be created for processes requiring fixes.'

The report is organized by activity:

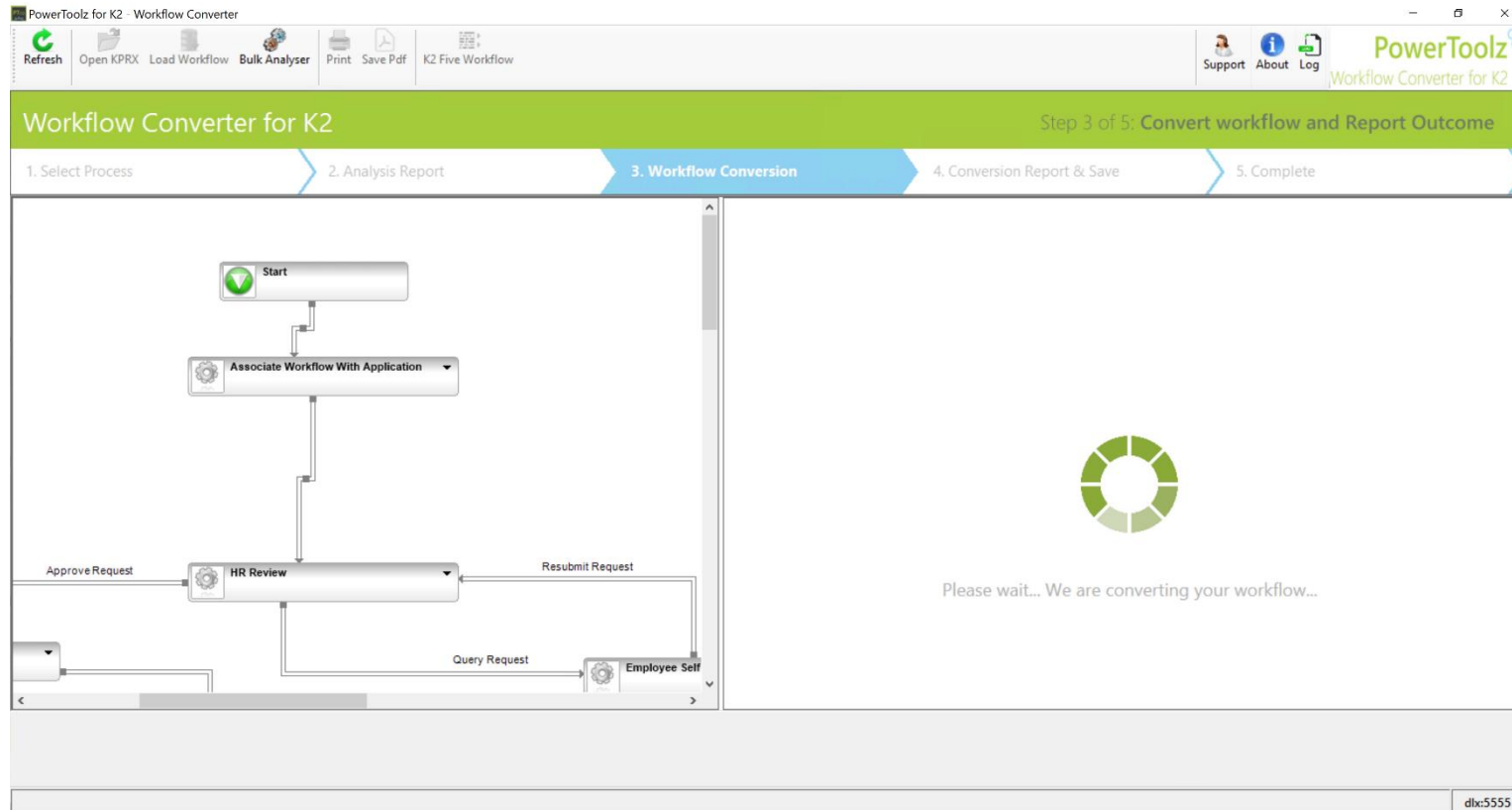
- Activity : Start**

Events	Target
1 Start	Workflow start configuration would not be converted automatically. This will need to be configured to the converted workflow manually.
- Activity : Initialize App Workflow**

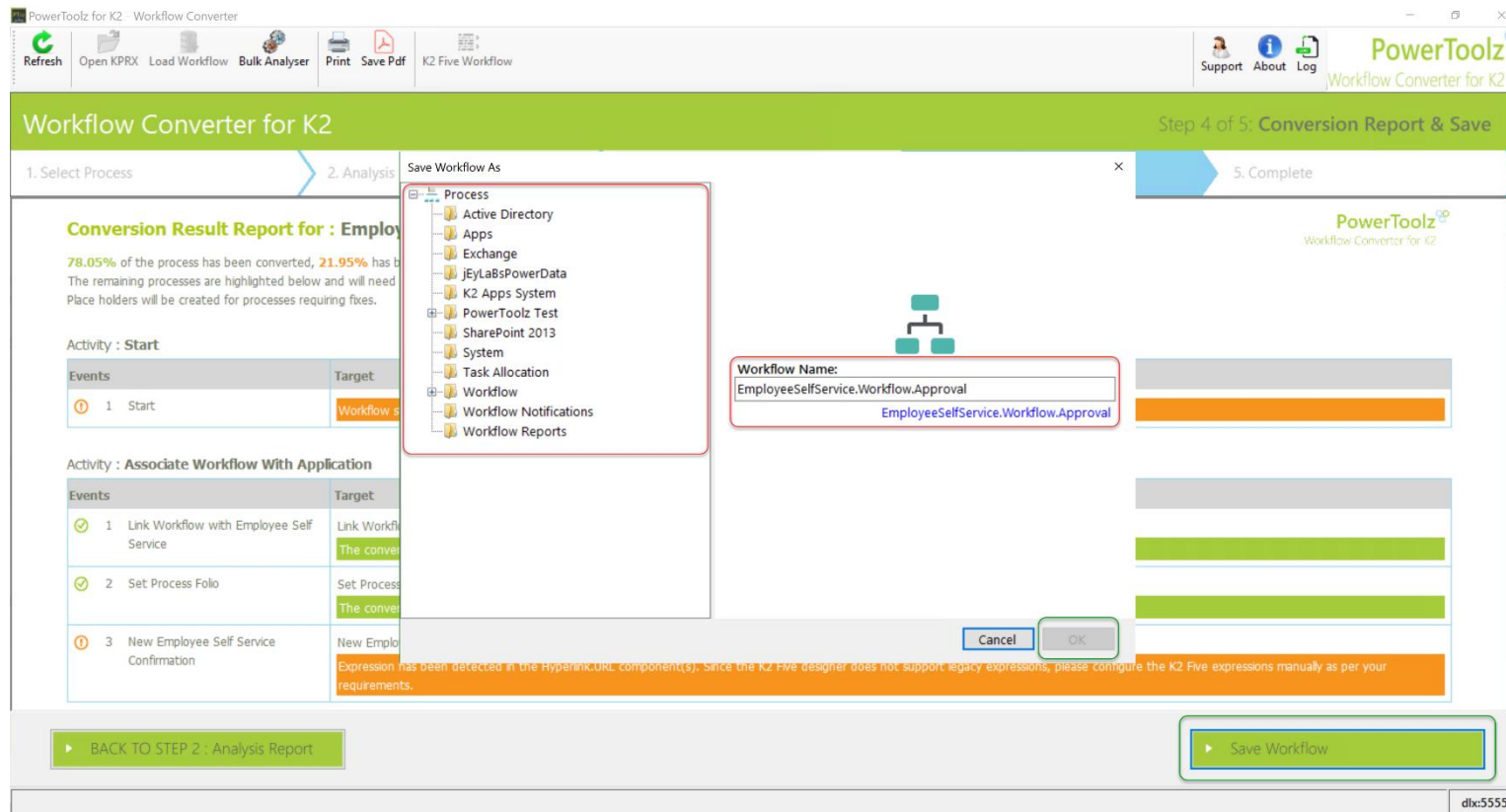
Events	Target
1 Update Corporate Communication	Update Corporate Communication The conversion will proceed without any impediments.
- Activity : Respond to Corporate Communication**

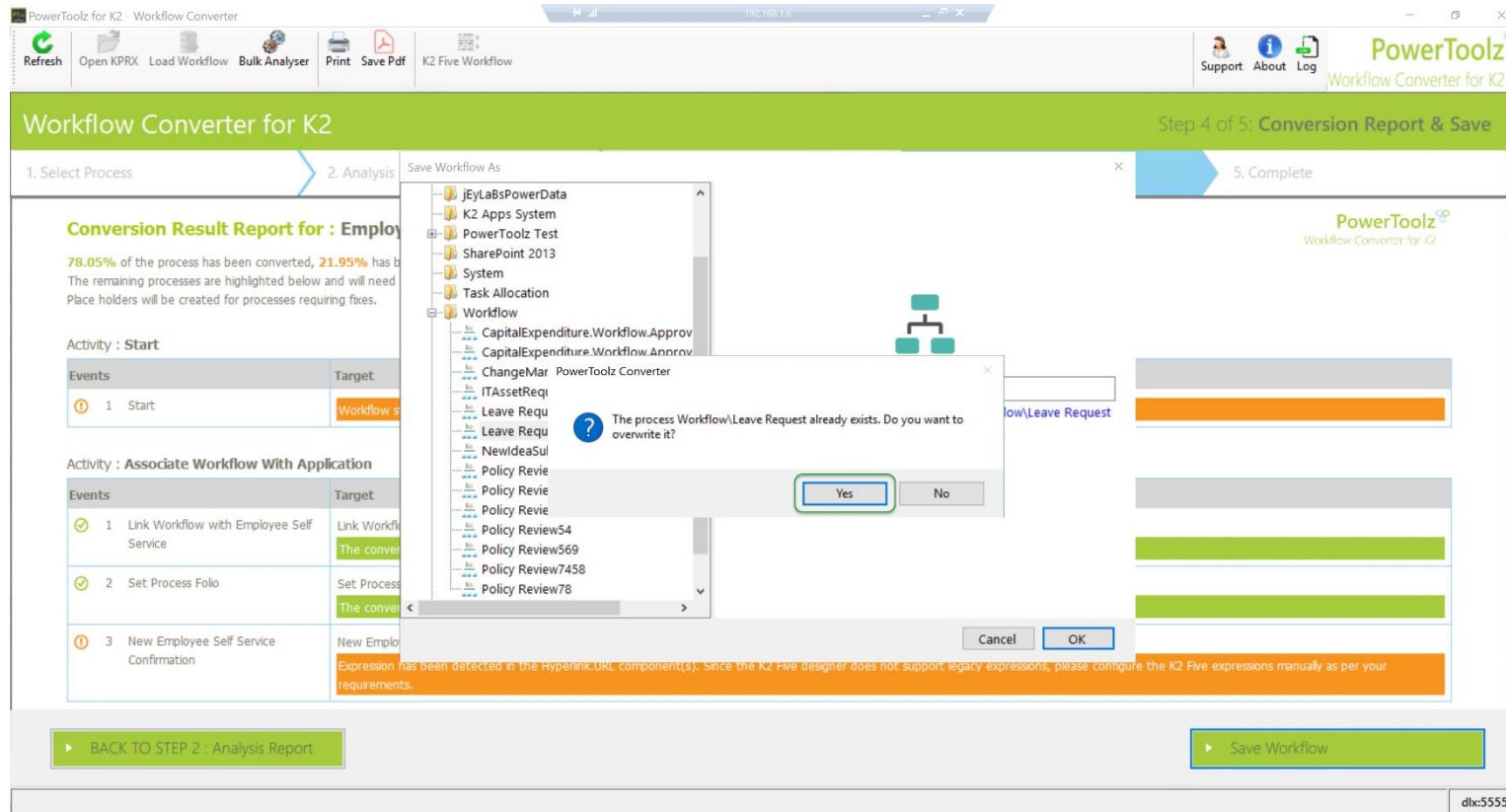
Events	Target
1 Create Recipient Response Record	Create Recipient Response Record The conversion will proceed without any impediments.

At the bottom, there is a 'BACK TO STEP 1: Select Workflow' button, a checkbox for 'Convert Activity Datafields to Process Datafields', and a 'GO TO STEP 3: Convert Workflow' button. The user ID 'dbx:5555' is visible in the bottom right corner.

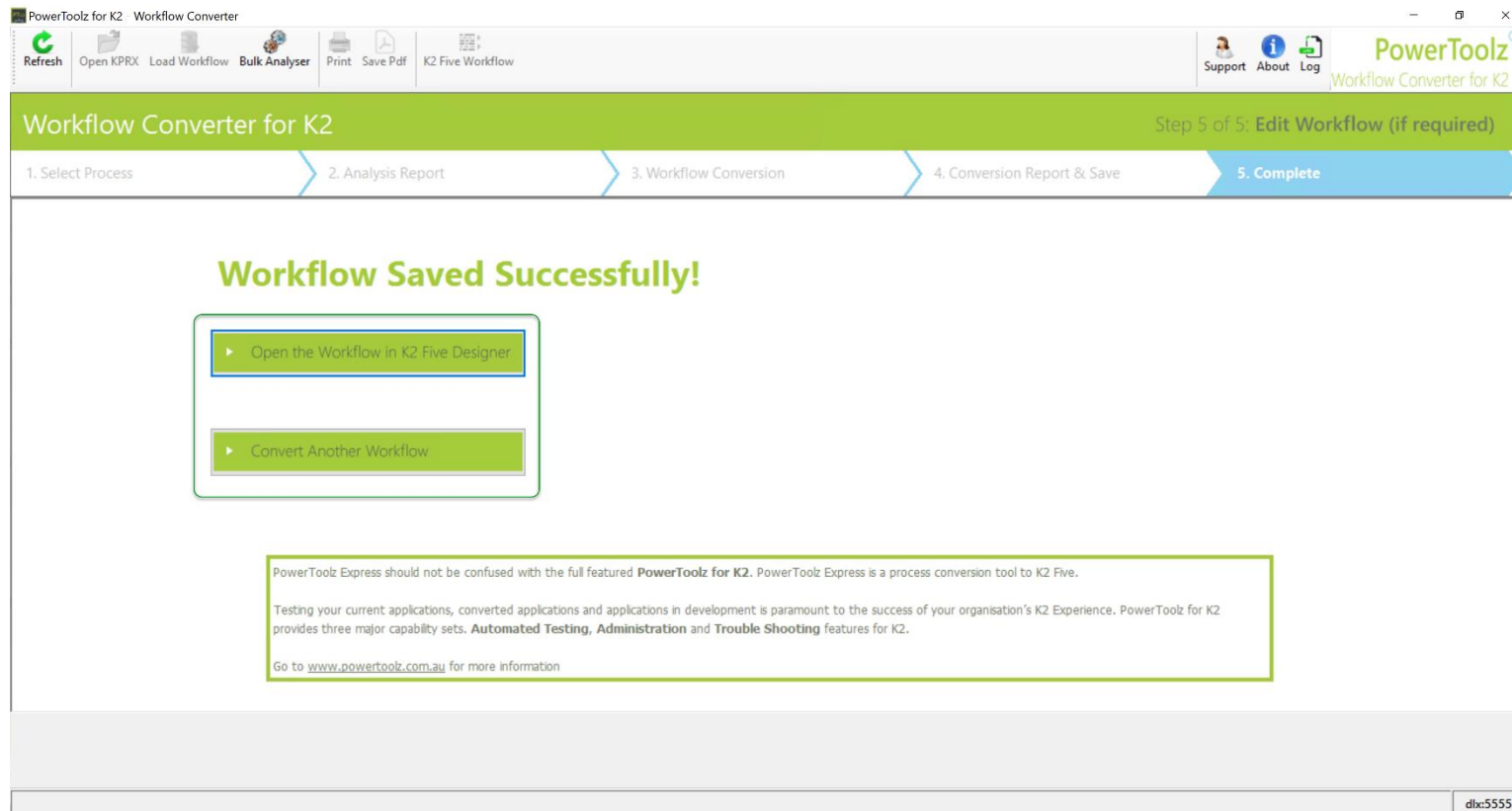


- After workflow has been converted, you be shown the conversion result on the screen. The colors and '**Target**' column will indicate you again on how much has been converted and what must be reconfigure manually. Click '**GO TO STEP 4**' button to be displayed with pop up screen for saving the converted workflow. Select the destination folder and Click '**OK**' to save and continue. If you select an existing process that you want to overwrite, warning pop up is shown. Click "**YES**" if you want to continue.



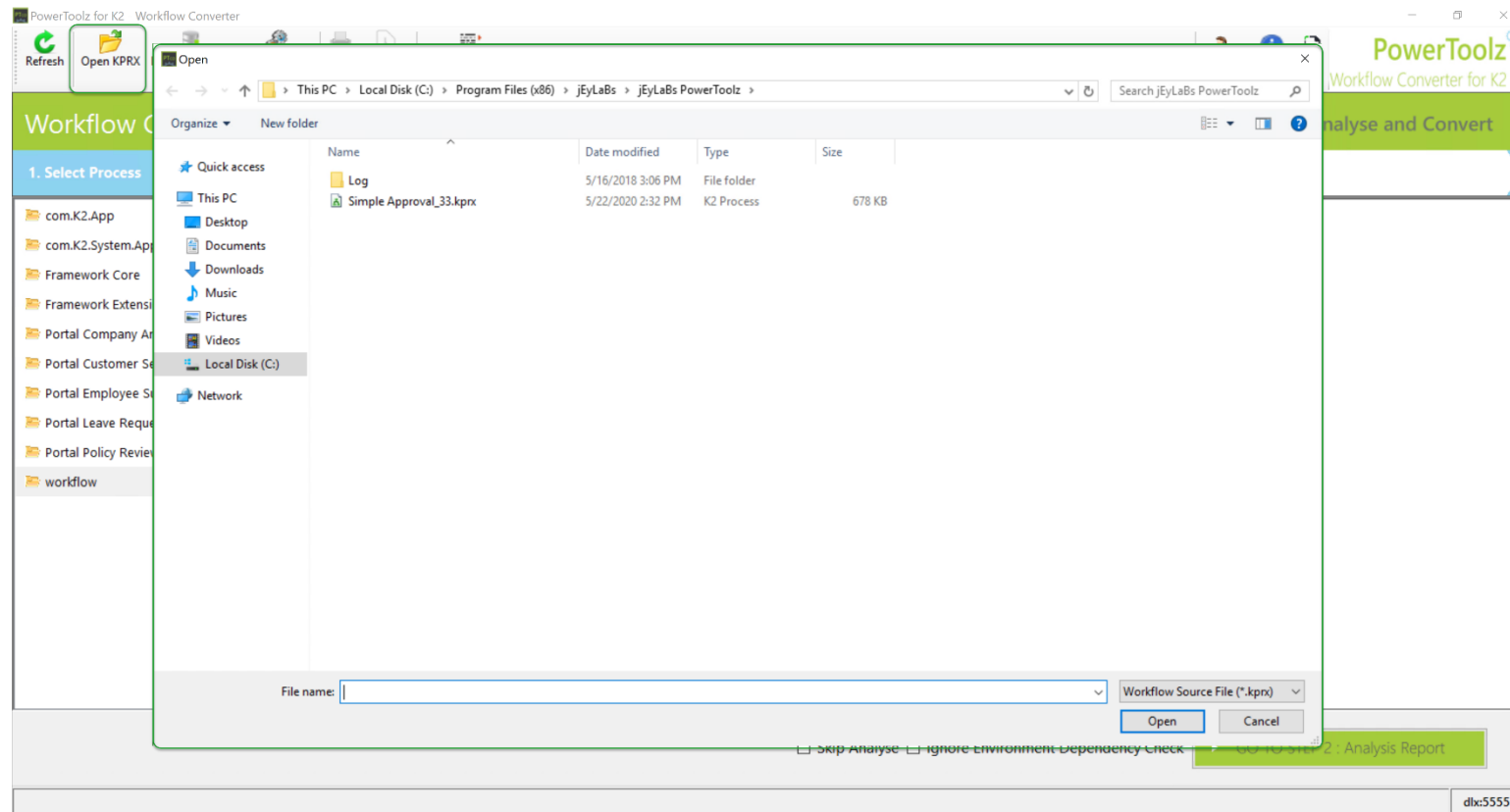


- You can now open the converted workflow with K2 Designer or convert another workflow but clicking the respective buttons.



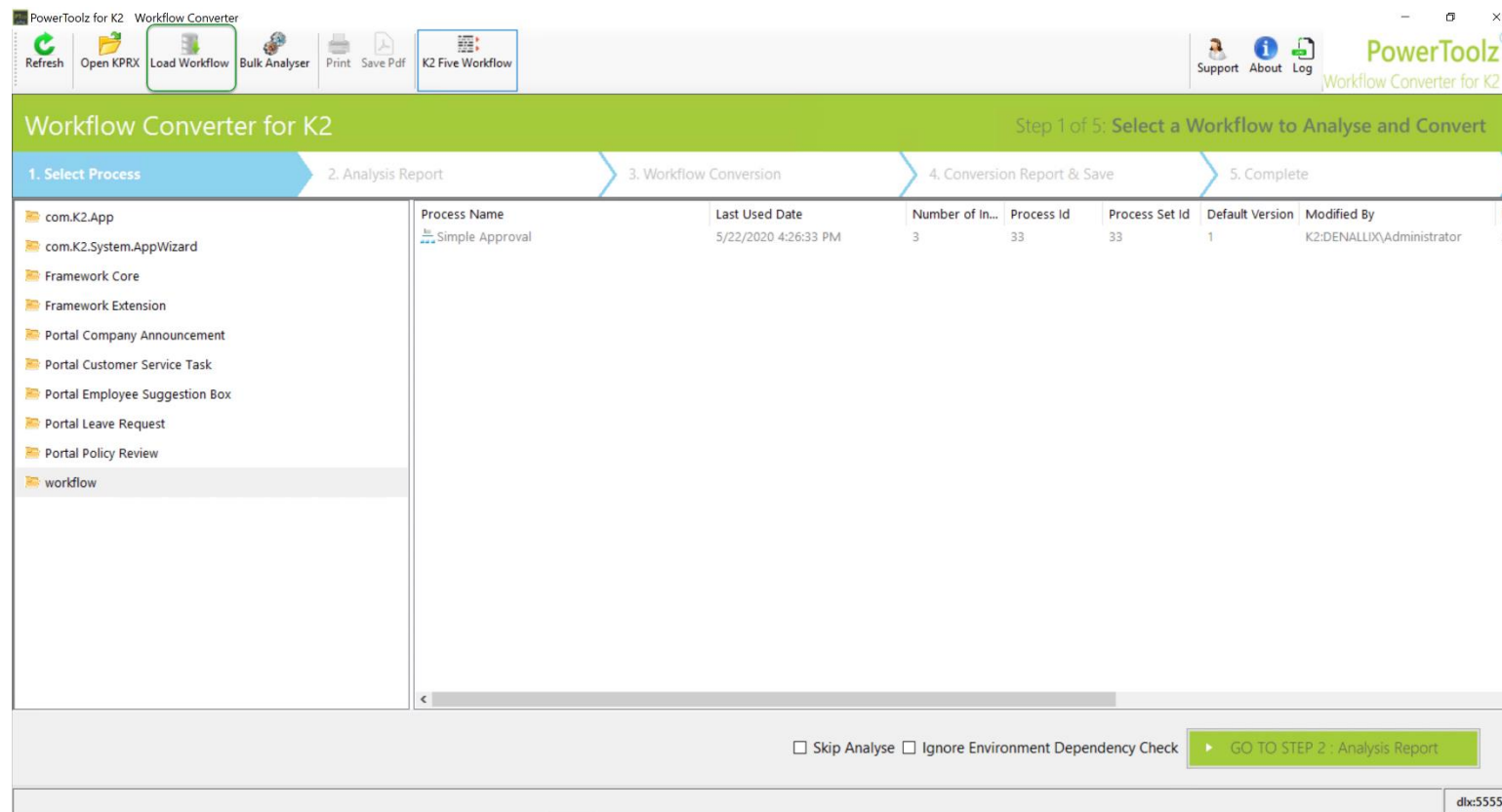
Open KPRX

1. To open a KPRX file instead of selecting it from the list click on ***“OPEN KPRX”*** from the top ribbon. Select the file from the pop up window and press ***“OPEN”***.



Loading Workflow

1. To load workflows from different server, click the **“Load Workflow”** button from the top ribbon.



2. Type in the server name that you want to load workflow from and click **“Load Workflow”** button. Select the workflow you want to convert and click **“GO TO STEP 2: Analyse Workflow”** to proceed with converting a workflow as instructed previously in the guide.

Load Process

Server

Server:

Host Server Port:

5555

Workflow Server Port:

5252

Security Label:

K2

UserName:

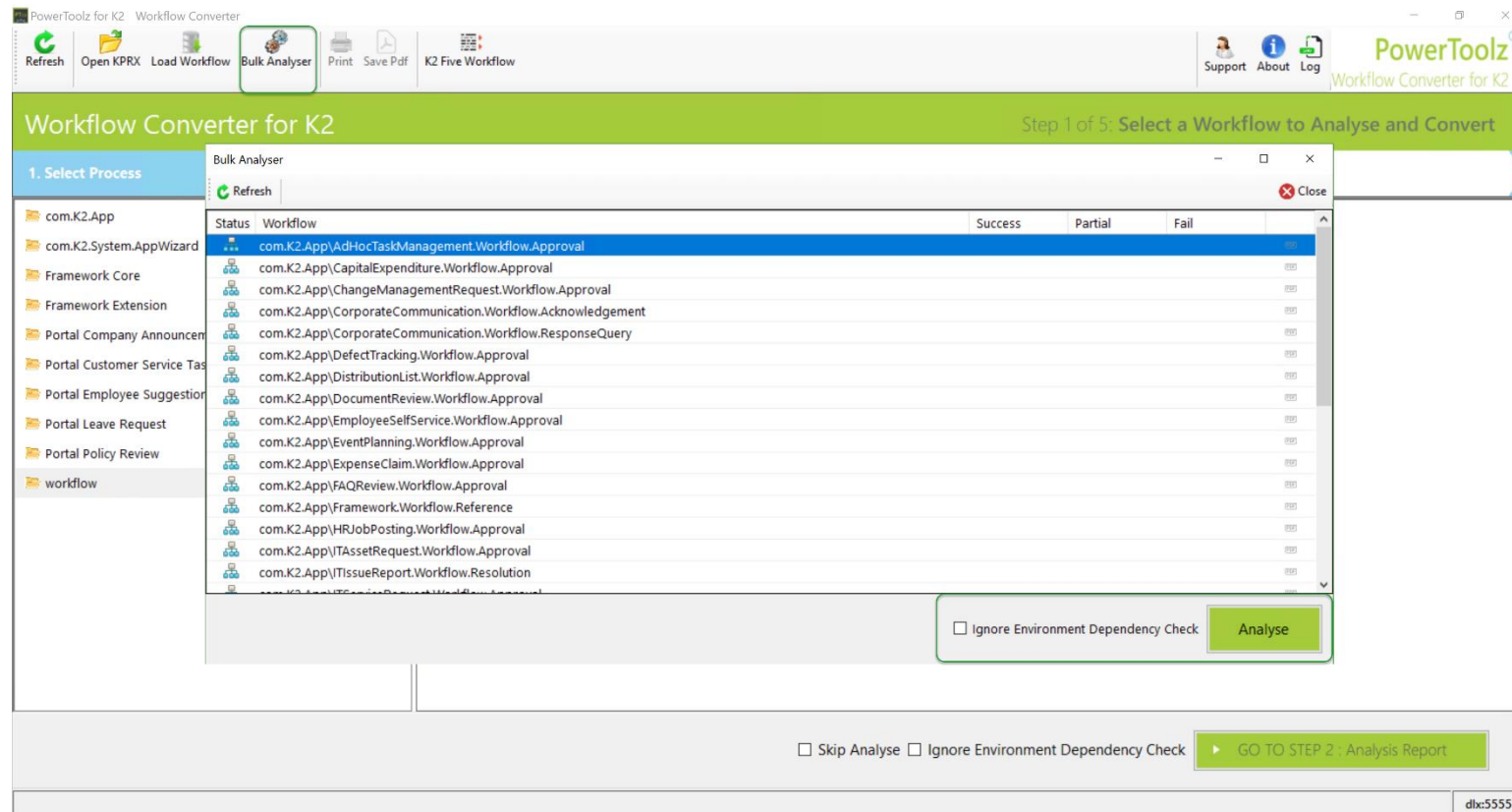
Password:

Load Workflow

Process Name	Last Used Date	Number of In...	Process Id	Process Set Id	Default Version	Modified By	M

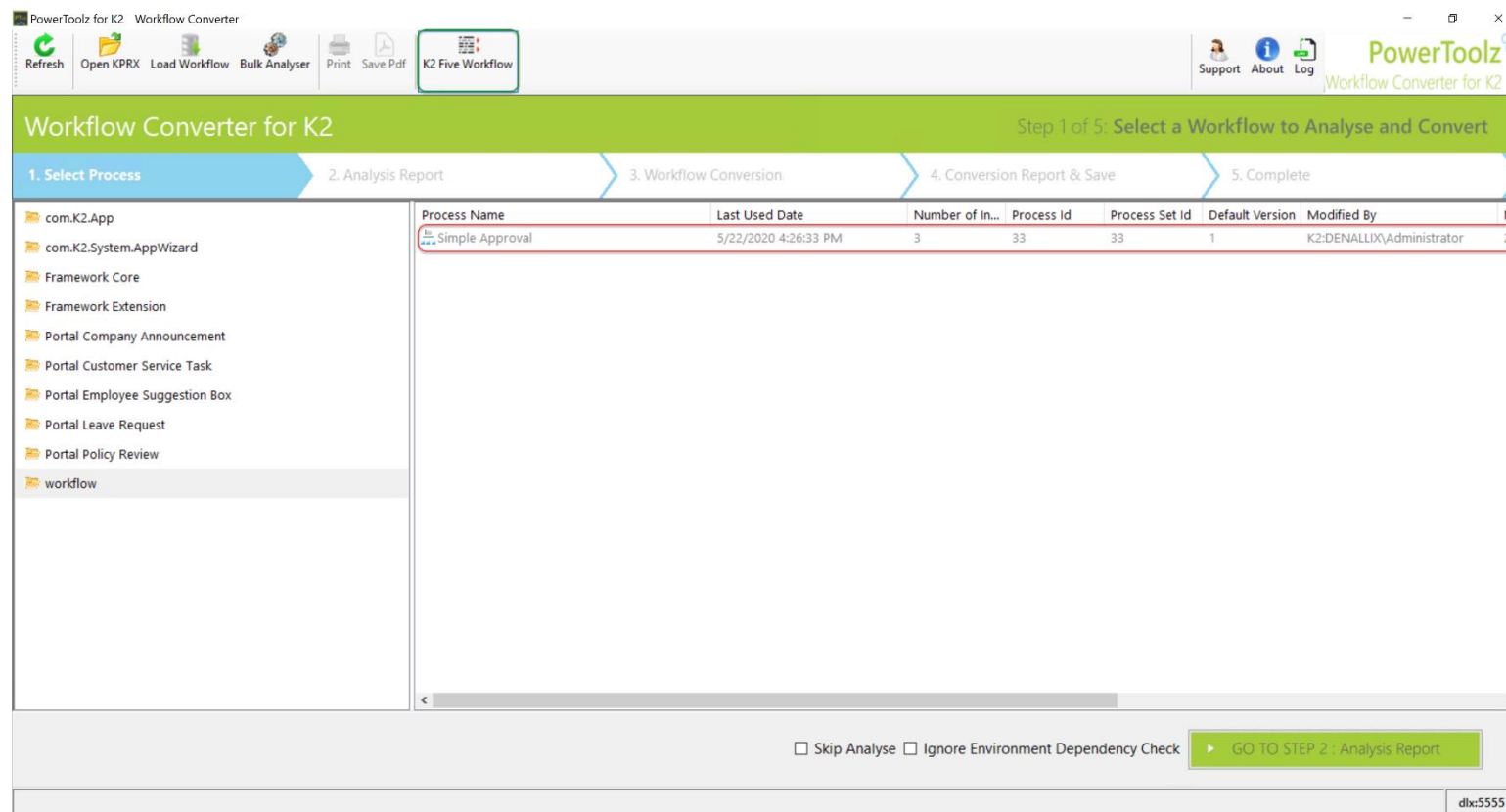
Bulk Analyser

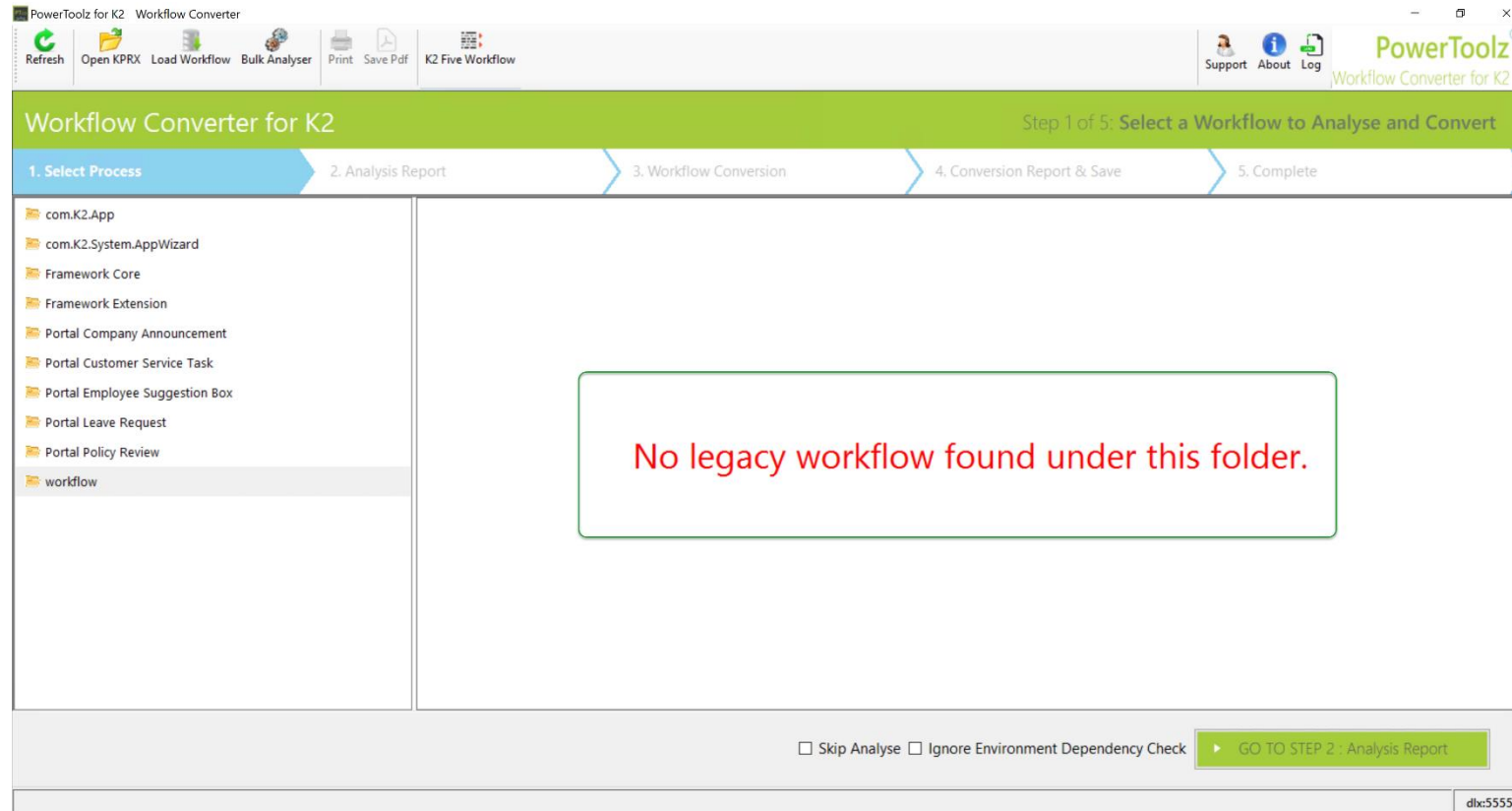
1. To analyse all your legacy workflow click on the **"BULK ANALYSER"** from the top ribbon. List of legacy workflow that can analysed is shown on the pop up window, click **"ANALYZE"** to continue.



K2 Five Workflow

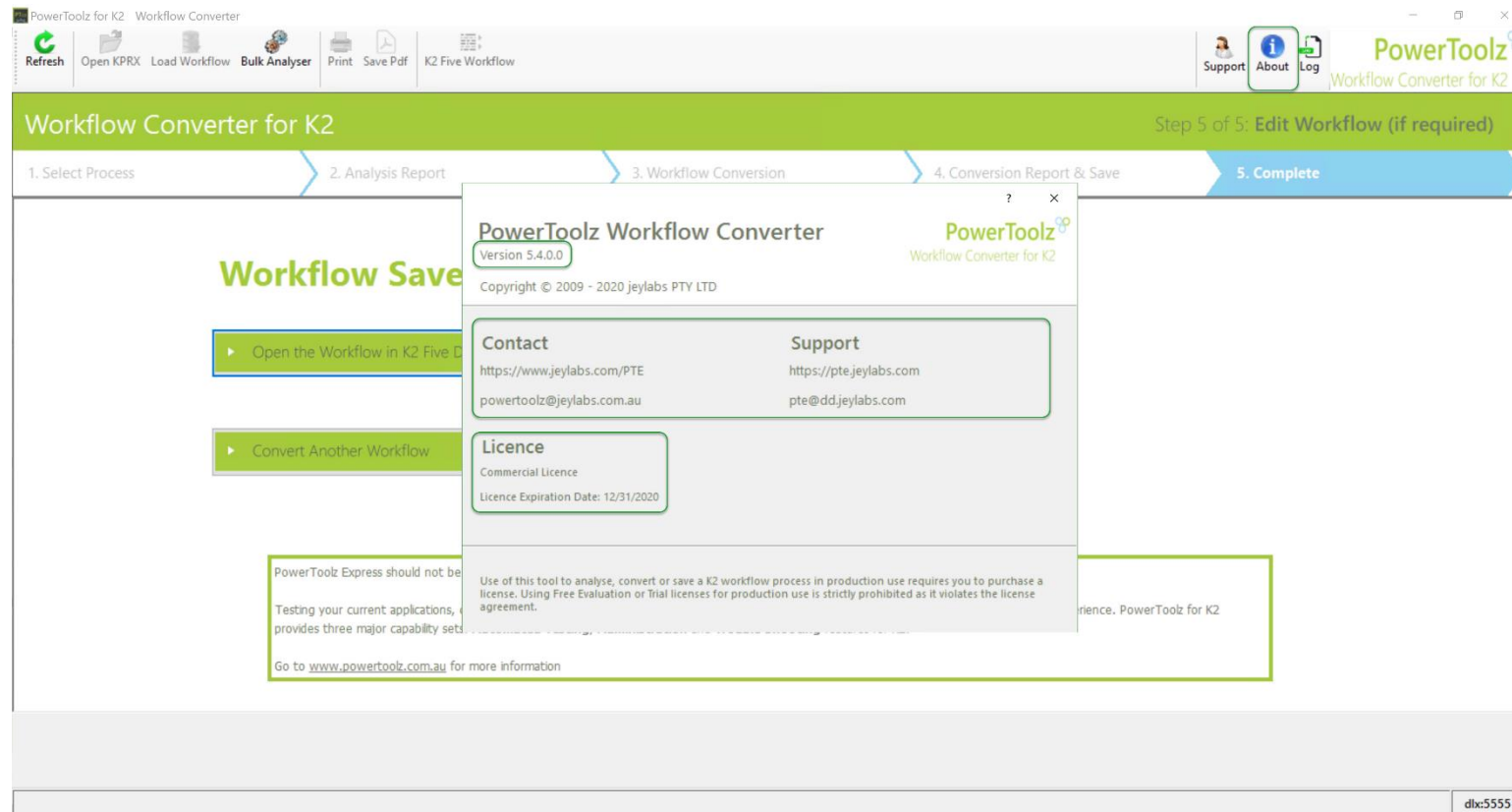
1. Click on the “**K2 FIVE WORKFLOW**” from the top ribbon to show any K2 five workflows. The will be greyed out to distinguish between the legacy workflows. If the button is not clicked any folder with only K2 Five workflows will show the following error message “**NO LEGACY WORKFLOW FOUND UNDER THIS FOLDER**”.





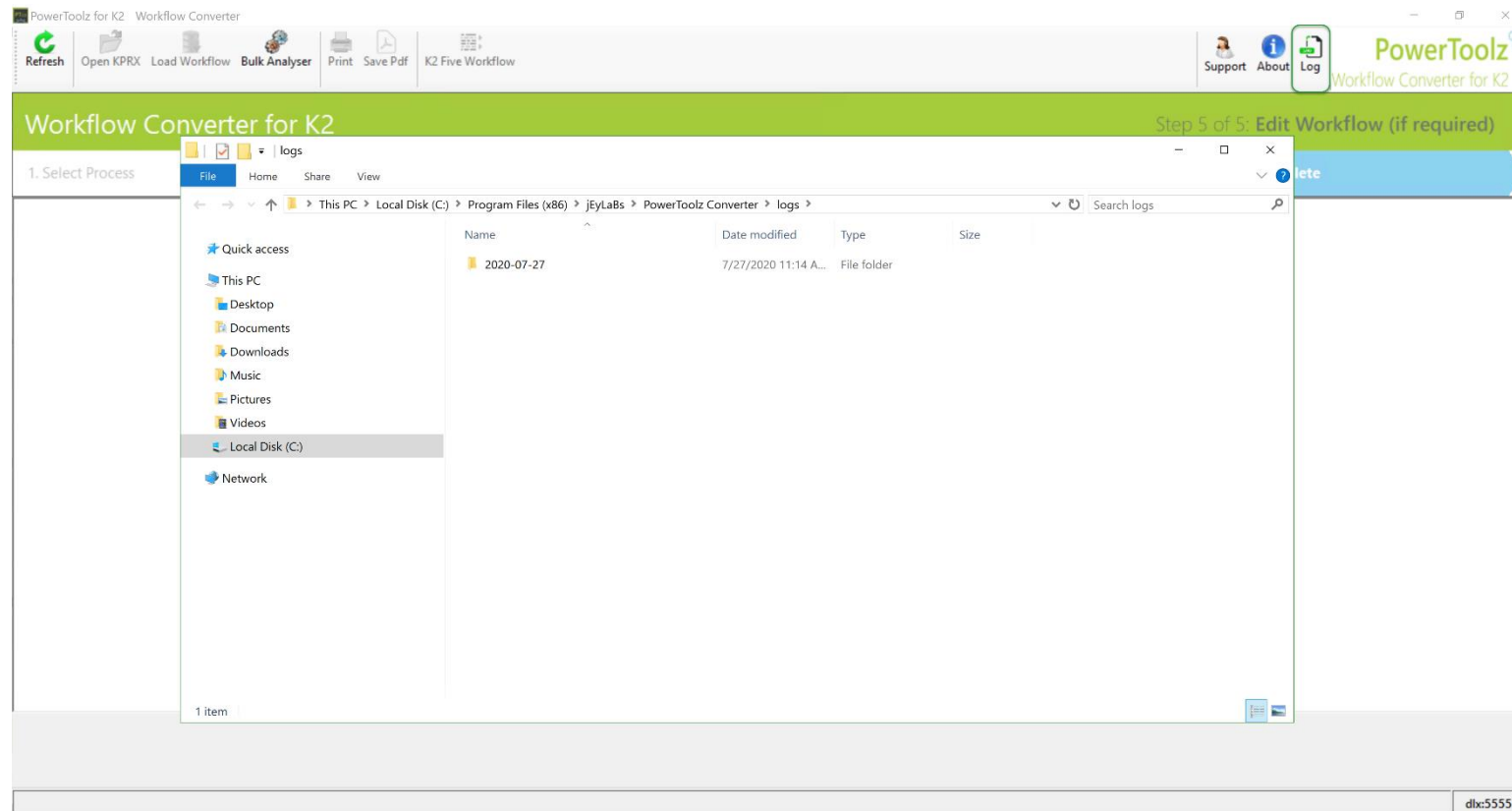
About

1. To find out more information on your PowerToolz workflow converter click on the **“ABOUT”** from the top ribbon. Pop up window with details of the tool will be displayed.



Log File

1. On occasion jeylabs will need to check your log file in order to support you with any issues you are having. To access the log file, click on “LOG” from the top ribbon which will open up a pop up window with where the log folder is.



Technical Details

Known and Available Conversion

- All Events will become Steps.
- Event Properties will become Step Properties. I.e. Name, Description, etc.
- Event Types will become Step Types. I.e. Email Event will become Email step, IPC Event becomes Sub Workflow Step, etc.
- Client Event such as default, SharePoint, SmartForm becomes Task Step.
- Event Canvas Positioning preserved.
- Multiple Events in an Activity will be changed to Multi-step.
- Process Data Fields will be named Workflow Data Fields.
- Item Reference is now Reference.
- Event Configuration becomes Step Configuration.
- Client Event Actions\Outcomes changes to Task Step Action\Outcomes.
- Event which has multiple outcomes I.e. Approve and Reject, will need a corresponding connected decision step.
- Email and Redirect Client Event Escalation will become Task Step Reminders.
- Destination Sets will be Recipient Groups.
- Basic non-logic Activity Connection Lines preserved.
- Activity Start Rule is known as Timer Step.

Deprecated Functionality

K2 Five Designer Deprecated Functionality	PowerToolz Workflow Converter	Notes
Events		
Default Server Event (code)	Placeholder Step	Currently this event cannot be converted therefore a placeholder step will be allocated.
Default Server Event (WF)	Placeholder Step	Currently this event cannot be converted therefore a placeholder step will be allocated.
Code reference Event	Placeholder Step	Currently this event cannot be converted therefore a placeholder step will be allocated.
Default client event	Task Step	-
SmartForms Client Event	Task Step	-
Forms Generation Client Event	Task Step	-
SharePoint Client Event	Task Step	-
Item Reference Event	Create Reference Step	-
Code Behind any event/rule	Guidance in Reports	This component is not supported by K2 Five. To convert this functionality, you must reimplement them manually.
Fields		
Activity Data Fields	Guidance in Reports	This component is not supported by K2 Five. To convert this functionality, you must reimplement them manually.
XML Data Fields	Guidance in Reports	This component is not supported by K2 Five. To convert this functionality, you must reimplement them manually.
Binary Type Data Fields	Guidance in Reports	This component is not supported by K2 Five. To convert this functionality, you must reimplement them manually.
Double Type Data Fields	Guidance in Reports	This component is not supported by K2 Five. To convert this functionality, you must reimplement them manually.
Long Type Data Fields	Guidance in Reports	This component is not supported by K2 Five. To convert this functionality, you must reimplement them manually.

Rules		
Preceding rules	Merge Step	
Start Rules	Timer Step	-
Line Rules	Use Decision/Split Step	-
Destination Rules for non-task steps	Guidance in Reports	This component is not supported by K2 Five. To convert this functionality, you must reimplement them manually.
Plan per destination one at a time Destination Rule	Recipient Rule	-
Succeeding Rules	Voting Rule	-
Process Start Rule	Guidance in Reports	This component is not supported by K2 Five. To convert this functionality, you must reimplement them manually.
Process Finish Rule	Guidance in Reports	This component is not supported by K2 Five. To convert this functionality, you must reimplement them manually.
Escalation		
Activity Escalations for non-task steps	Guidance in Reports	This component is not supported by K2 Five. To convert this functionality, you must reimplement them manually.
GoTo Activity Escalations	Guidance in Reports	This component is not supported by K2 Five. To convert this functionality, you must reimplement them manually.
Association/Reference		
SmartObject Associations	Guidance in Reports	This component is not supported by K2 Five. To convert this functionality, you must reimplement them manually.
SmartObject References	Item Reference Step	-
Process References(dlls)	Guidance in Reports	This component is not supported by K2 Five. To convert this functionality, you must reimplement them manually.