GBS
A BULPROS COMPANY

Configuration Manual

SharePoint interface for GBS Workflow Manager 4.1

Document Version 1

Contents

1 Introduction

This manual is addressed to administrators of *SharePoint interface for GBS Workflow Manager* and describes its configuration.

Prerequisites:

To permit the configuration of SharePoint interface for GBS Workflow Manager, the following prerequisites must be fulfilled:

- The environment is set up for SharePoint.
- A SharePoint account exists for the user.
- GBS Workflow Manager Server has been installed.
- A GBS Workflow Manager login exists for the user.
- The user has Tenant Administrator permission in the GBS Workflow Manager.

2 The Start page of SharePoint interface for GBS Workflow Manager

Once you have logged on to the SharePoint and the installation of the app (refer to Installation Manual) has been completed, the Start page can be called through the link of the app.

Enter your **GBS Workflow Manager Tenant**, the **Username** and the **Token**.

The **Token** must correspond to the token that is stored in the settings of the GBS Workflow Manager tenant.

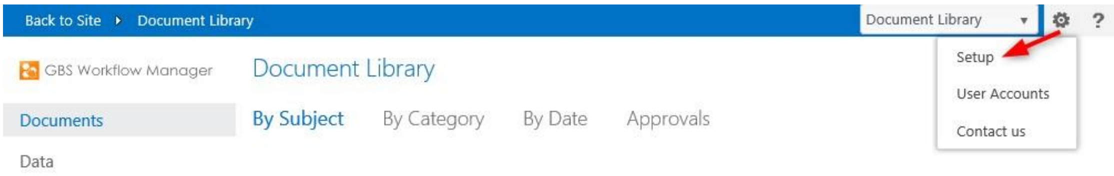
Entering the **Secret key** is optional. It is used to encrypt, for example, passwords. The usage of a Secret key prevents that passwords need to be sent readable in clear text. It must be the same secret key that is also used on the GBS Workflow Manager side.

The secret key must be provided to you from your cloud provider or, in case of an on-premise version, it is your administrator who specifies the key.

The navigation area will not be loaded at the first call of the app since no Workflow Manager applications have been connected yet at this point.

3 Setting up the SharePoint interface for GBS Workflow Manager

The Setup function that is called from the tool bar is available to the administrator.



3.1 Settings

3.1.1 Compatibility of field types - SharePoint and Workflow Manager

In order to allow the association of SharePoint with Workflow Manager field types according to their compatibility, a so-called **Table Seed** is performed. This has the effect that later when fields are associated, only compatible fields are included in the choice list (refer to *Associating SharePoint fields with Workflow Manager fields)*.

This table informs you about the compatible field types:

SharePoint Field Types	Workflow Manager Field Types		SharePoint Field Types	Workflow Manager Field Types
Attachments	Attachment		Multiple lines of text	Currency, Boolean
Manual Choice:				Input Field, Text Area, Formatted Text,
Choice (displayed as: Radio Buttons)	Radio Buttons			Email, Phone,
Choice (displayed as: Drop-Down Menu)	Scrollable List			Number, Date and Time, Date
Choice (displayed as: Drop-Down Menu)	Dropdown		Number	Number, Boolean
Choice (displayed as: Checkboxes)	Multi List Box		Person or Group	NamePicker
Currency	Currency, Number		Single line of text	Input Field, Text Area, Formatted Text, All choice fields with dynamic choice options
	Input Field, Textarea			Email, Phone,
DateTimes	Date			Number, Date and Time, Date
	Date and Time			Currency, Boolean
			Yes/No Checkbox	Boolean

Please note:

- Choice fields (such as radio buttons, dropdown lists, etc.):
  - ☐ With manually entered choice options in the Workflow Manager form, they have to be associated with a SharePoint **Choice** field.
  - ☐ With dynamically generated choice options in the Workflow Manager, they have to be associated with a SharePoint **Single line of text** type.
- Editors, readers, stand-ins of default workflow or document fields of Workflow Manager should also be mapped to ‘Person or Group’ SharePoint field types

- In document libraries, contents of rich text fields (formatted text) cannot be displayed correctly, since this field type does not exist in document libraries. In lists formatted text is displayed correctly.

3.1.2 Tenant Settings

Open the **Tenant Settings**. The data is preset through the completed installation of the Workflow Manager, but it can be modified. This is possible for the following data:

- URL of the Workflow Manager installation
- Secret key
- Token

In addition, you can find here the following information:

- App domain
- App domain prefix
- Database prefix
- Internal identifier
- Workflow Manager Tenant
- Workflow Manager Tenant ID.

3.1.2.1 URL of GBS Workflow Manager Installation

The **URL of a Workflow Manager installation** is the URL of the server on which the GBS Workflow Manager Server is installed and with which you want to connect yourself, for example: *https://workflowmanager.gbs.com*.
If Workflow Manager can be accessed only with URLs that include additional path information, such as "/app", you have to enter this path information as well. The same is true, if a port number (such as 8080 or 8443) is required to connect to the Workflow Manager server.

If required, you can change the URL of the Workflow Manager installation. Use the pen icon  next to the **URL of the Workflow Manager installation** field.

3.1.2.2 Secret Key

The Secret key is used as key for encryption, e.g. for the encryption of passwords. The Secret key prevents from sending passwords need in clear text. It must be the same Secret key that is also used on the GBS Workflow Manager side.

In case it is necessary one day to change the Secret key on the GBS Workflow Manager side, then you can enter here the new Secret key. To change the Secret key, in the Tenant Settings, click the pen icon in the **Secret Key** row and enter the key.

Note: The Secret key must meet the following conditions:

- Consist of at least 16 numeric characters, and
- Must not exceed a length of 32 characters, and
- The number of characters must be an integer multiple of 4
  (thus, allowed are these: 16, 20, 24, 28 and 32).

Note: When you change the key, it may take a few minutes until all user settings have been changed.

3.1.2.3 Sync User

The Sync User is required for the data synchronization process between the Workflow Manager tenant and the SharePoint server. The Sync User must be registered in the connected Workflow Manager tenant as a person and should be a Site Collection Administrator on the used SharePoint site.

In case it is necessary one day to change the Sync User on the GBS Workflow Manager side, then you can define the new Sync User here. In the **Tenant Settings**, click the pen icon in the **Sync User** row and enter the new value.

Note: In the dialog that opens, a warning is displayed pointing out that the Sync User must have

- Tenant Administrator permission in the Workflow Manager tenant and
- be a Site Collection Administrator in SharePoint.

Note: When you change the Sync User, it may take a few minutes until all user settings have been changed.

3.1.2.4 Token

The token is needed for the authentication of the users between the SharePoint server and the Workflow Manager server. Therefore, it is necessary that the same values are configured in both settings, the **Tenant Settings** and the **settings of the connected Workflow Manager tenant**. As a token, you can enter any string with a maximum of 255 characters.

Should it ever be necessary to change the token on the GBS Workflow Manager side, then you can define the new token here. In the **Tenant Settings**, click the pen icon in the **Token** row and enter the value.

Note: When you change the token, it may take a few minutes until the new token takes effect.

3.1.3 Site Settings

The **Site Settings** primarily serve to manage the applications (**Application manager**).
Here, you specify which Workflow Manager applications from the configured Workflow Manager tenant are available on the current SharePoint site. Users can associate SharePoint lists or libraries with workflows or forms from all Workflow Manager applications which are configured here.

3.1.3.1 Default setting: Use all released applications

By default, the **Use all released applications** option is activated. If so, all Workflow Manager applications are available which are released in the configured tenant.

3.1.3.2 Configuring only a subset of applications

In order to provide only certain applications to be associated with SharePoint lists or libraries, deactivate the **Use all released applications** option. Then add the desired applications manually one by one.

1. Click **Add**.
2. In the **Map Application** dialog, use the drop-down arrow to choose the desired application.
   You can choose from all released applications of the tenant.
   Your application with its name and ID will then be listed in the table.
3. Repeat this step if you want to add additional applications.

Use **Delete** if you want to remove an application.
Please note: No question dialog will be displayed. Instead, the deletion will take effect immediately.

3.1.4 Removing the tenant mapping

If required, you can remove the mapping between the SharePoint Tenant and the GBS Workflow Manager tenant. This could occur, for example, if you have used the tenant, in a first step, only as a test tenant that you might want to remove later.

Removing the tenant assignment

Please note: If you perform the steps below for removing the tenant assignment, it will have the following effects:

You will remove all connections between the SharePoint Tenant and the GBS Workflow Manager tenant.
All the following connection types are affected:

- SharePoint lists and Workflow Manager forms and workflows
- SharePoint libraries and Workflow Manager forms and workflows
- SharePoint fields and Workflow Manager fields
- As well as SharePoint Webs and Workflow Manager applications.
- Furthermore, all connected content types will reset their NewForm and EditForm to the initial form.

1. In the **Setup** area, open **Settings > Tenant-Settings**.
2. Click the **Remove connection to Workflow Manager Tenant** button that is located in the bottom part of the page.
   A dialog is opened and a warning is displayed which makes you aware of the consequences of the removal pointed out above under *Please note*.
3. To remove the connection, click **OK**.
   You will then be routed to the Host Web on which the app was installed.

   Please note: Once the routing to the Host Web is completed, close your browser to ensure the deletion of the current session data.

   Remark: In the Confirm Deletion dialog, you can still cancel the deletion task by choosing **Cancel**. When doing so, no connections will be deleted and you will be routed to the domain manager.

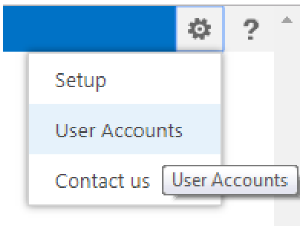
3.2 Grant user permissions – User Accounts

The standard functions of SharePoint are used to set users. This is done in the **Site Settings** where **People and groups** are defined. All users who have been defined either in the Azure Active Directory in case of SharePoint Online or in the Active Directory in a SharePoint Server environment are available.

Furthermore, the users must have the required permissions in the **Site Collection**.

To grant a user **Administrator** permission to the Provider Hosted Add-in, you must add the user as Site Collection Administrator.

In addition, it is required that the users also have permissions in the connected Workflow Manager tenant. These are granted automatically.



On the **User Accounts** page, all users working with GBS Workflow Manager are displayed. The users are automatically added here as soon as they work for the first time with GBS Workflow Manager. This can happen, for example, when they create a new SharePoint list entry. After synchronization, also those users are added here who are involved in a workflow in some way or who appear, e.g. in a name picker field in a document.

Split according to the associated applications, information about each user is available. This refers to the permissions on both parts, on SharePoint and in the Workflow Manager applications.

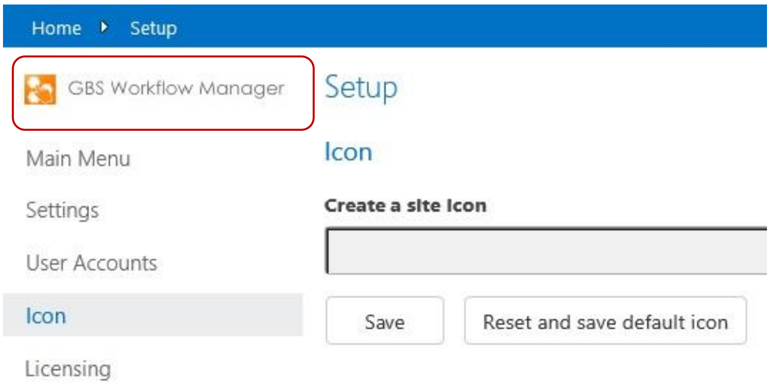
Customizing the table:

- You can expand or collapse the content for an application.
- You can use the drop-down arrow in every column title to
  - sort ascending or descending
  - mark under **Columns** which columns to display
  - set the filter criteria in the filter dialog

The „Is Sync User" column informs whether this user account is used for data synchronization between SharePoint and the GBS Workflow Manager. You can change the Sync User account on the **Tenant Settings** page.

3.3 Choosing the site icon

By default, the standard icon is set.



Use the **Browse** button to choose your own icon. The following file formats are permitted: .png, .gif, .jpeg, .jpg, .jpe or .jfif.

Click **Save** to apply the new icon.

If you specify your own icon, you can see the change in the top left corner.

You can use the **Reset and save default icon** button to reset the default icon.

3.4 Checking the license status

On the **Licensing** page, you can check whether a valid license is present for the use of the GBS Workflow Manager.
For information about the management of the license data, please refer to the GBS Workflow Manager documentation.
An „Invalid license" error message appears if the Workflow Manager license is missing or incorrect.

3.5 Log

The log shows important information which may help to determine the cause of the issue. In addition, this information allows the support team to react more rapidly to your possible support requests.

It shows the date and time of the occurrence. The log includes error messages that occurred from user actions and, if not configured differently, also information regarding the synchronization. From the drop-down list, you can select the log file you want to display.

3.6 Setting up the automatic synchronization

A scheduled synchronization should be set up between SharePoint lists and the GBS Workflow Manager server. There are two options depending on the location where the provider-hosted add-in runs:

- If it runs on a Windows server, a task has to be created in the task scheduler.
- If it runs in Azure, a Web Job has to be created there.

3.6.1 Setting up a Web Job in AZURE

Note: A successful configuration of the Web Job requires the existence of the ZIP file that includes the logic for the automatic synchronization. Make sure that this file exists. Contact your GBS Workflow Manager consultant if appropriate.

1. The Zip file contains the **AppDesigner-WebJob.exe.config** file in which some configuration settings need to be specified.
   In the **appSettings** section, adjust the following parameters according to the current environment:
   - **ClientId:** String consisting of 16 characters which is generated on the SharePoint website under **/_layouts/15/appregnew.aspx** and which is also entered in the app package of the AppManifest.xml file.
   - **ClientSecret:** String that is used to decrypt and to sign all tokens that are used on your website. It is generated together with the ClientID on the SharePoint website under **/_layouts/15/appregnew.aspx**.
   - **BaseUrl:** Url of the SharePoint website on which the Workflow Manager is located.

   In the **log4net** section, you can define the location of the Web Job logs:

- **File:** Enter the path to the logs folder. If not changed, the logs will be created in the SyncTool location under the Logs folder.

In the **connectionStrings** section, adjust the following parameters according to the current environment:

- **DataSource**: The connection to the database instance.
- **User ID:** The user who can access the database (dbcreator Role)
- **Password:** The password for this user.

2. Navigate to the AZURE portal and choose the AZURE website on which the Workflow Manager provider-hosted add-in was published and then select the **WEBJOBS** page.

3. To add the Web Job, click **Add**. In the **Basic WebJob Settings** window, specify the following settings:

   - Add the Zip file (that contains the logic for the automatic synchronization) by clicking on **Select a file**.
   - Enter a name for the Web Job, e.g. „SyncJob20180123".
   - Under **Type**, select **Triggered**.
   - Under **Triggers**, select **Scheduled**.
   - The CRON expression consists of 6 fields: seconds, minutes, hours, days, weeks, months, as shown in the examples below:

Once per hour (i.e. if the number of minutes equals 0): `0 0 * * * *`

Every hour from 8:00 to 18:00: `0 0 8-18 * * *`

Daily at 9:30 a.m.: `0 30 9 * * *`

Every 10 minutes: `* */10 * * * *`

Every 15 minutes from Monday to Friday: `* */15 * 1-5 * *`

Tip: Microsoft provides a detailed description of this topic: https://azure.microsoft.com/en-us/documentation/articles/web-sites-create-web-jobs/

3.6.2 Setting up a Windows Task Scheduler

Note: A successful configuration of the Task Scheduler requires the existence of the EXE file for the automatic synchronization. Make sure that this file exists. Contact your GBS Workflow Manager consultant if appropriate.

The setting up of a Windows Task Scheduler consists of the following steps:

- Opening the task scheduler
- Task creation
- Definition for the execution of the program.

Opening the task scheduler

To open the Windows Task Scheduler, proceed as follows:

1. Click **Start**.
2. Choose **Control panel** (> **System and Security**) > **Administrative Tools**.
3. Double-click on **Task Scheduler**.
   The Task Scheduler opens.

Task creation

1. In the menu bar, choose **Action > Create Task**.
2. On the **General** tab, enter a name and a description.

   For example, "GBS Workflow Manager Sync Job" as Name and "Sync Job for the GBS Workflow Manager" as description text.

   On the **Triggers** tab, click the **New** button.
   Set the **Repeat** interval by clicking the respective checkboxes, so that the task is performed every hour for an indefinite duration.
3. Confirm the settings with **OK**.

Defining the program execution

1. Switch to the **Actions** tab and click **New**.
2. Specify the following settings:
   - Under **Actions**, select **Start a program**.
   - Use **Browse** to select the **AppDesigner-WebJob.exe** file (for the automatic synchronization) from the WebJob.zip file.
3. Now, confirm all open windows with **OK**, until your password is requested.
4. Enter your password.

The definition of the task is completed and the task is executed by the system.

4 Association of GBS Workflow Manager elements and SharePoint elements

4.1 Types of associations

The following four different types of associations are possible:
(the respective content type in brackets)

- SharePoint list with Workflow Manager form (**Forms for Items**)
- SharePoint list with Workflow Manager workflow (**Workflows for Items**).
- SharePoint library with Workflow Manager form (**Forms for Documents**)
- SharePoint library with Workflow Manager workflow (**Workflows for Documents**).

Important remarks on the content types:

- Only *one* form or *one* workflow can be associated per content type.
- Every form or every workflow can be used *only once* within your tenant.

Automatic or manual association:
Associating an GBS Workflow Manager workflow or a form with a SharePoint list or library can take place either in a very much automated way or manually. It depends on the list or library which procedure is the most convenient. In any case, even if the automatic way is used, the field association of the list or library can still be modified after their creation.

4.2 Automatic association

Using the automatic field association between Workflow Manager and SharePoint is especially convenient, if there is a rather limited number of Workflow Manager fields that should be reflected in almost the same way in the SharePoint list or library.

Prerequisites:

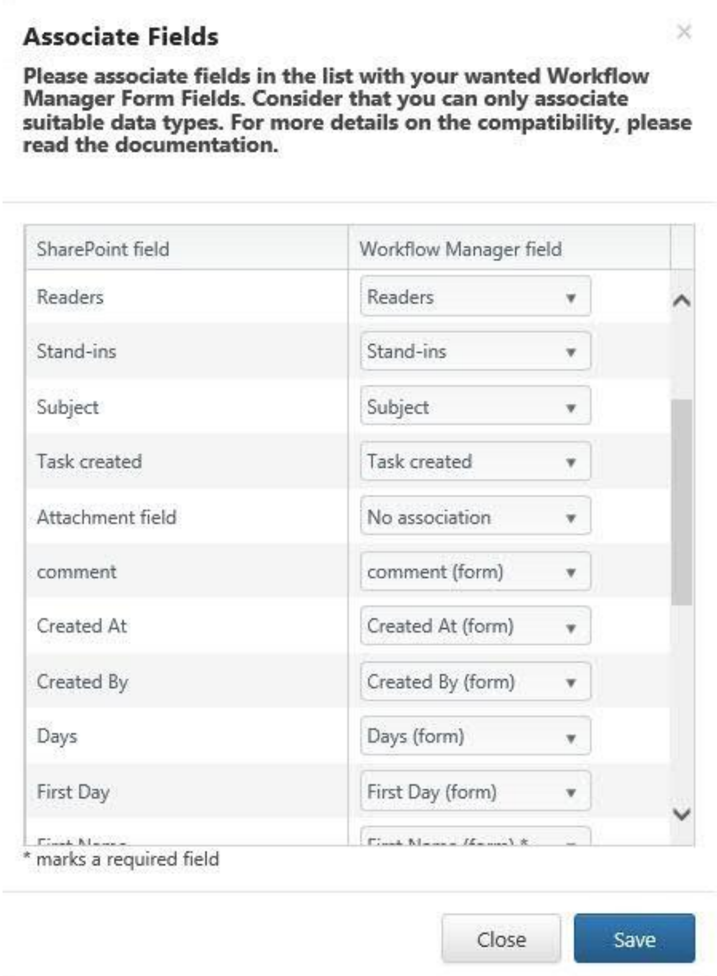
- A GBS Workflow Manager application that contains a Form respectively a Workflow is available to you.
- You have created a SharePoint custom list respectively library.
  No further specific settings are needed.

In the following, you will find the steps for the association of a SharePoint list with a GBS Workflow Manager workflow. The procedure for different types of associations follows the same principle.

Associating a GBS Workflow Manager workflow to a SharePoint list

1. Open the list and from the GBS Workflow Manager tab, choose Associate Workflow.
   The **Prepare list for association** dialog opens.
2. Click **Yes**, in order to set the list settings required for this type of association automatically, for example, the content type.
3. In the **Associate a Workflow with this list** dialog, select the application and then the workflow.
4. In order to generate the fields and the mapping automatically,
   under **Prepare list**, select the **Automatic field generation & mapping** option and click **Save**.
   The **Associate Fields** dialog opens and displays proposals for associations:
   - For every field that is available in Workflow Manager (custom and default fields), a SharePoint field with the same name is generated.
   - For any required SharePoint fields for which no Workflow Manager field could be associated automatically, you have to select a Workflow Manager field to associate it. For example, the "Title" field, is a required SharePoint field.

   Remark: You can change the proposed associations by selecting different Workflow Manager fields.
   Even after the next step of saving the associations, you can still re-open the **Associate Fields** dialog to make changes, for example by not associating certain Workflow Manager fields or modifying the associations.



5. Click **Save** and close the field association dialog.
   The SharePoint list is now displayed with the SharePoint **All Items** view. It includes a separate column for each of the associated fields.
   You can edit the view if you want to only display your preferred fields.
6. You can now start creating items.

4.3 Manual association

Choosing the manual association of Workflow Manager with SharePoint lists or libraries is appropriate, for example, in case of large numbers of Workflow Manager fields and of which only a subset should be displayed in SharePoint

If you have created an application in the GBS Workflow Manager or an application has been made available to you and you have setup lists with the respective columns on SharePoint side, you can associate the Workflow Manager application with the SharePoint list or SharePoint library. To do so, follow these steps below:

- Create the columns of the SharePoint list or library
- Associate
  - a SharePoint list with a Workflow Manager form or a Workflow Manager workflow document
  OR
  - a SharePoint library with a Workflow Manager form or a Workflow Manager workflow document
- Associate SharePoint fields with the Workflow Manager fields.

Note: For the names of sites, folders and files, only use the characters approved by Microsoft. A list of characters that you cannot use can be found on the Microsoft website [Information about characters that you cannot use in site names, folder names, and file names in SharePoint](#).

4.3.1 Creating the columns of the SharePoint list or library

1. Open the list settings or library settings.
2. Specify the columns that you want to use in the list or library.
   To do so, click on **Create column**.
3. Select the type, specify the other desired settings and click **OK**.
4. Repeat this for every column you want to create.

Note:

- Maximum number of characters:
  For each column, you can specify the **Maximum number of characters** setting. Please note, that this setting only affects the display of the respective column. It has no impact on the corresponding field in the form of GBS Workflow Manager. If you want to modify the setting for a column later on, you have to delete the column, recreate it, and then to re-associate it in the **Associate Form** 

 or **Associate Workflow** 

 dialog.
  Otherwise, the change does not affect the column in the list or library that is used with GBS Workflow Manager.
- Short column names:
  In case of short column names such as „Col1“ or „SSL2“, it might happen that some characters of the name get encrypted within SharePoint. In this case, the functioning of GBS Workflow Manager may be affected. If you notice problems with lists or libraries in which such short column names are used, change the column names.

4.3.2 Associating a SharePoint list or library with a GBS Workflow Manager form or workflow

The procedure for creating the different possible types of associations follows the same principle. Depending on the association that you want to make on the GBS Workflow Manager side – with a form or a workflow -,

start with **Associate Form** 

or **Associate Workflow** 

in the first step.

The following steps explain the association procedure of a SharePoint library with a Workflow Manager form as an example:

1. To associate a form with a library, open the **GBS Workflow Manager** tab and click **Associate Form**.
2. In the **Associate Form** window, click the **Associate form with this list** button.
3. In case the **Prepare list/library for association** dialog appears, click **Yes**.
   The settings will automatically be completed according to the originally chosen type of association.
4. In the opened **Associate** dialog, provide the following data:
   - If the desired content type is not preset, choose the **Content Type**, with which you want to associate the form.
   - If appropriate, enter the **Tenant**.
     Remark: The tenant selection field is only displayed, if more than one tenant is available. In case of only one tenant, this step is obsolete.
     Once the tenant is selected, Workflow Manager needs a little moment to refresh the data for the next two selection fields.
   - As soon as available, select the application and at last the **Form**.
     Remark:
     If a workflow is associated, the workflow can be selected at this point in the **Associate Workflow** dialog.

   Note: Leave the **Automatic field generation & mapping** unchecked, so that you can continue to associate the fields manually and not having created SharePoint fields which you might not want to generate.
5. Confirm your entries with **Save**.

In the **Associate Form** dialog, the associations with the chosen data are now listed in the table. If required, you can use the trash icon to completely remove the association.

4.3.3 Associating SharePoint fields with GBS Workflow Manager fields

If an association exists between a list or library (on SharePoint side) and a workflow or a form (on Workflow Manager side), it will be displayed in the **Associate Workflow** or **Associate Form** dialog. At this point, you can define the association in more detail. To do so, you have to create an association between the fields: the SharePoint fields and the corresponding Workflow Manager fields.

Note: Make sure that the SharePoint fields are available for the current list or library. They are listed in the **List Settings** or **Library Settings** under **Columns**. To create a new column, use **Create Column**, provide the **Column name**, and select the **Information type**.

4.3.3.1 Associating the fields

1. In the association row of the **Associate Form** or **Associate Workflow** dialog, click the link icon .
2. In the **Associate Fields** dialog, specify which Workflow Manager field corresponds to the SharePoint field.
   Fields with an asterisk * are mandatory and have to be associated. Otherwise, you cannot save your entries.
   Also for the **Attachment field**, select the corresponding field from the Workflow Manager form.
   Remark: Only compatible field types are selectable. For a list of compatible fields, refer to *Compatibility - SharePoint and Workflow Manager field types.*
3. Confirm with **Save**.

4.3.3.2 Associating choice values

Remark: **Choices options – dynamically generated versus manually created in the GBS Workflow Manager**

- In the case of dynamically generated choice options in Workflow Manager, the association of the options takes place automatically. In this case, the SharePoint column is of the **Single line of text** type.
- In the case of choice fields with manually entered choice options in the Workflow Manager form, you have to additionally associate a SharePoint choice field to the Workflow Manager choice field. This indispensable since otherwise a correct functioning cannot be guaranteed.

Associate manually created choice items

If it is an association of a choice field, the **Associate Choices** dialog is opened automatically as soon as you have selected the Workflow Manager field.

In this dialog, you can associate the choice values of the choice fields with each other.

Once you have made your associations, click **Update** to save them.
If required, you can discard the changes. To do so, click **Close**.
In both cases, this takes you back to the field association dialog.

If you want to make changes to the choice association, you can open the **Associate Choices** dialog with this icon  located next to the Workflow Manager field choice.

Save the associations in the **Associate Fields** dialog.

The list is now associated to the Workflow Manager form and is ready to be used.

The synchronization with the GBS Workflow Manager application is performed in defined, scheduled intervals automatically.

You can close the **Associate Form** or **Associate Workflow** dialog and set up further associations.

4.4 Association of existing SharePoint content with Workflow Manager

You might have content in SharePoint lists or libraries that you would like to use now in connection with the GBS Workflow Manager. In this case, once you have created the form with the appropriate fields in the Workflow Manager, you can easily combine it with your SharePoint list or library by migrating the existing SharePoint entries.

Note: This possibility only exists for associations with forms, not with workflows.

Prerequisites:

- You have a SharePoint list or library with entries.
- A GBS Workflow Manager form exists that contains fields that you want to associate with the existing SharePoint fields.

1. Open the list from the **GBS Workflow Manager** tab, choose **Associate Form**.
   The **Prepare list for association** dialog opens.
2. Click **Yes**, in order to set the list settings required for this type of association automatically, for example, the content type.

3. In the **Associate a form with this list** dialog, select the application and then the form.
4. In order to generate the fields and the mapping automatically,
   under **Prepare list**, select the **Automatic field generation & mapping** option and click **Save**.
   The **Associate Fields** dialog opens and displays proposals for associations.
5. Make adjustments if required and then click **Save**.
   If you would now close the association table, there would not be any migration of the existing list entries.
6. To perform the migration, click on the “plus” icon that is now included in the last column of the association dialog.
7. In the **Migrate old list content** dialog, click **Yes**.
   Now, the **Item** Content Type is added to the table.
8. Close the association dialog.
   When you now open any ‘old’ item, it is displayed with the GBS Workflow Manager form.
9. You can now add items to the list.

Remark: To display the ‘old’ items without the GBS Workflow Manager form, go back to the **Associate Form** table and delete the **Item** content type.

4.5 Displaying tasks and documents in a dialog

It is possible to let tasks and items open in a dialog instead of being displayed on the current page which is the default behavior.
To specify the opening in a dialog, in the **Advanced settings**, under **Launch forms in a dialog**, select **Yes**.

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