

Joget Workflow v5



Getting Started Guide

Revision 1
April 2015

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1. Overview

Jo-get Work flow v5, is an open source platform to easily build enterprise web apps for cloud and mobile.

- Build **full-fledged** apps, e.g. CRM, HR, Healthcare, et cetera
- Drag and drop **forms, lists, UI**
- Add **workflow** to automate processes
- Extend via **plugins**
- Apps are **mobile** optimized and **cloud** ready
- Download ready-made apps from the **Joget Marketplace**

This guide provides a brief introduction, and more detailed information is available in the Knowledge Base at <http://community.joget.org>, as well as the official website at <http://www.joget.org/>. Please note that some of the examples are for the Enterprise Edition, but the basic concepts are similar for the Community Edition.

2. Installation

2.1 Installation on Windows

1. Run the setup file `joget-setup-x.x.x.exe` to launch the Setup Wizard.



2. Click on **Next** on the Introduction page, **I Agree** on the License page, and **Next** on the Components page.
3. Change the Destination folder if required, then, click on **Install**. Once the installation is complete, click on **Finish**.
4. To start the Joget Server, go to **Start Menu > Programs > Joget Workflow** and click on the green **Start Joget Server** icon under Joget Workflow. The startup might take some time, so please wait until the message "INFO: Server startup in XXXX ms" appears (XXXX represents the time taken for the startup). Do not close the command window.
5. Go to **Start Menu > Programs > Joget Workflow** and click on **App Center**. This will launch the App Center in a web browser.
6. To stop the Joget Server, go to **Start Menu > Programs > Joget Workflow** and click on the red **Stop Joget Server** icon under Joget Workflow.

2.2 Installation on Linux

1. Create a new directory (e.g. /opt/joget) and extract the tar.gz bundle into that directory

2. Install the **Java** Runtime Environment (**JRE**) or Java Development Kit (**JDK**) version 6 and above
3. Install **MySQL** Server version 5 and above
4. Create an empty database '**jwdb**' in the MySQL server
5. Execute the setup script to create the required database tables: `./setup.sh`
6. Execute the bundled **Apache Tomcat** application server: `./tomcat8.sh run`
7. Access the **App Center** at <http://localhost:8080/jw>

2.3 Upgrading from v4

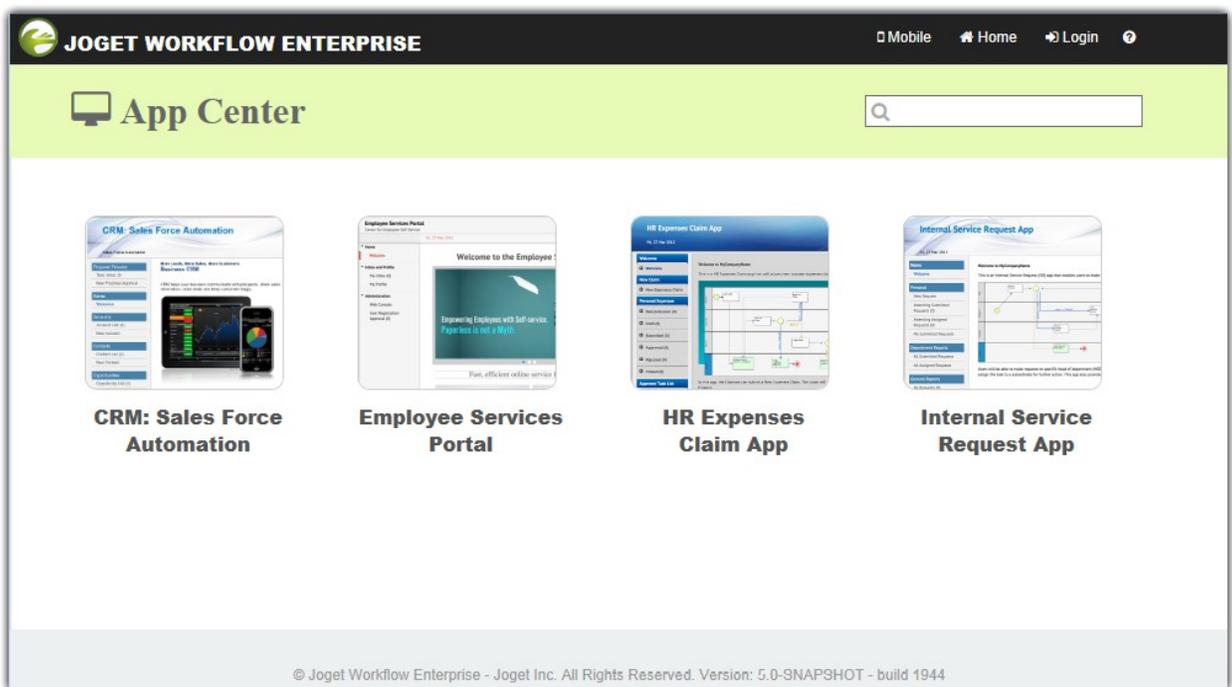
1. As with any upgrade, it is strongly recommended that you test the upgrade on a **development** or **test** environment first. Please **backup** your files and perform the necessary tests after the upgrade.
2. Extract the v5 Windows ZIP or Linux tar.gz, and locate the v5 **jw.war** and **jwdesigner.war** files under the Apache Tomcat webapps directory (e.g. `apache-tomcat-7.0.39/webapps`)
3. It is possible to test run v5 in conjunction with v4. To do this:
 - i. Rename the new **jw.war** to **jw5.war** and copy it to the Apache Tomcat webapps directory "**[Joget v4 Installation Directory]/apache-tomcat-7.0.52/webapps**".
 - ii. Once the war file has finished deploying, you can then access v4 at <http://localhost:8080/jw4>
4. To perform an actual upgrade to replace v4:
 - i. Stop the v4 Apache Tomcat.
 - ii. Delete the existing v4 files in "**[Joget v4 Installation Directory]/apache-tomcat-7.0.52/webapps**":
 1. **jw.war**
 2. **jwdesigner.war**
 3. **jw** directory
 4. **jwdesigner** directory

- iii. Delete the v4 Apache Tomcat working directories i.e. the "**jw**" and "**jwdesigner**" directories in "**[Joget v4 Installation Directory]/apache-tomcat-7.0.52/work/Catalina/localhost**".
- iv. Copy the v5 files **jw.war** and **jwdesigner.war** into the Apache Tomcat webapps directory "**[Joget v4 Installation Directory]/apache-tomcat-7.0.52/webapps**".
- v. Start the v4 Apache Tomcat

3. Introducing Apps and the App Center

3.1 Introducing Apps

1. Joget Workflow apps can range from a simple database-driven app, to a complex approval process, or even a full-fledged solution (e.g. CRM) which incorporates workflow, data management and reporting.
2. The **App Center** is the default landing page in Joget v5 which displays a grid of published apps. To access the App Center, use a web browser to access the Joget server at <http://localhost:8080/jw> (Replace **localhost** and **8080** with the appropriate server host and port if necessary)



3. Click on the **Login** link on the **top right** to login as a user. Each user may have access to different apps depending on permissions.

Some sample logins are provided in a standard installation as follows:

Administrator:

Username: admin

Password: admin

Normal User (Employee):

Username: cat

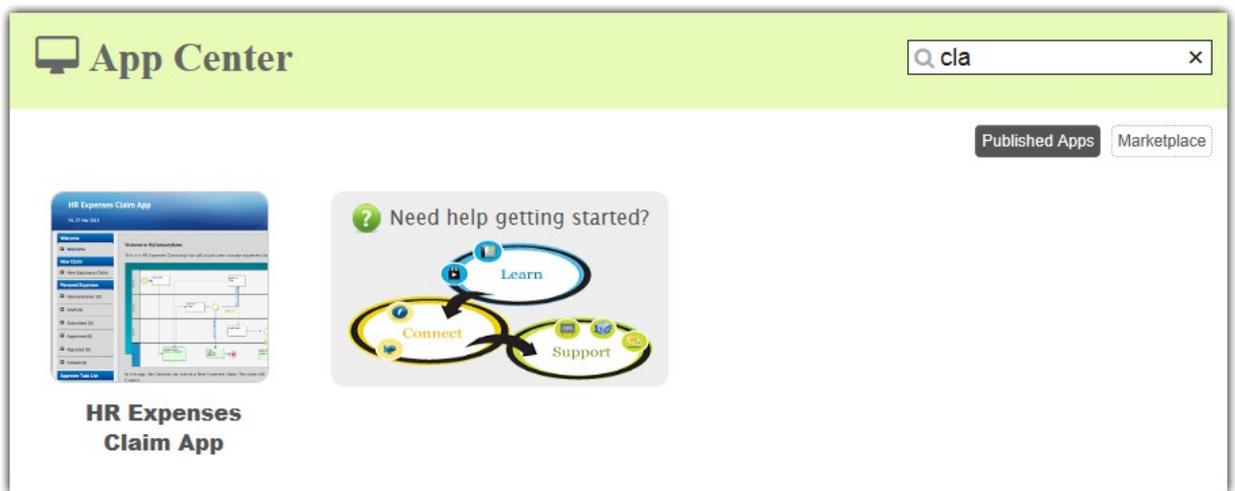
Password: password

Normal User (Manager):

Username: clark

Password: password

4. Use the search box to quickly find an app. For example, type **claim** to look for the sample **HR Expenses Claim App**



5. Clicking on the app icon will launch that app in a separate browser window.

3.2 Introducing Userviews, Forms, Lists and Processes

1. A **user view** is a front-end UI for an app. An app may contain 1 or more user views. User views can have different themes, and consist of menu pages that contain forms, lists, reports, HTML content, etc.

HR Expenses Claim App
Mon, 6 Apr 2015 Logout

Welcome

Welcome

New Claim

New Expenses Claim

Personal Expenses

Resubmission (0)

Draft (1)

Submitted (0)

Approved (0)

Rejected (0)

Closed (1)

Approver Task List

Approver Inbox (0)

Finance Department

Claims Listing (0)

Closed Expenses

Welcome to MyCompanyName

This is a HR Expenses Claim app that will allow users to make expenses claims that goes through an approval cycle.

```

graph TD
    subgraph Claimant
        Start(( )) --> EditClaim[Edit Claim]
        EditClaim --> ResubmitClaim[Resubmit Claim]
        ResubmitClaim --> EditClaim
    end
    subgraph Approver
        ApproveClaim[Approve Claim]
    end
    subgraph Finance
        VerifyClaim[Verify Claim]
    end
    subgraph System
        UpdateRecord[Update Record Status to Submitted]
        NotifyApproverRejection[Notify Approver Rejection]
        NotifyFinanceVerified[Notify Finance Verified]
        NotifyFinanceRejection[Notify Finance Rejection]
    end
    EditClaim --> ApproveClaim
    ApproveClaim --> VerifyClaim
    VerifyClaim --> UpdateRecord
    VerifyClaim --> NotifyApproverRejection
    VerifyClaim --> NotifyFinanceVerified
    VerifyClaim --> NotifyFinanceRejection
    NotifyApproverRejection --> ResubmitClaim
    NotifyFinanceVerified --> End1(( ))
    NotifyFinanceRejection --> End2(( ))
    NotifyFinanceRejection --> End3(( ))
    
```

In this app, the Claimant can submit a New Expenses Claim. The claim will be routed to the Manager for approval followed by Finance.

You will need to login before you can use the system.

Participants in this process:

- cat (Claimant)
- clark (Manager)
- admin (Finance)

LOGIN with "cat" to start the Expenses Claim Process.

Powered by Joget

HR Expenses Claim App Logout

Mon, 6 Apr 2015

- ▼ **Welcome**
 - Welcome
- ▼ **New Claim**
 - New Expenses Claim
- ▼ **Personal Expenses**
 - Resubmission (0)
 - Draft (1)
 - Submitted (0)
 - Approved (0)
 - Rejected (0)
 - Closed (0)
- ▼ **Approver Task List**
 - Approver Inbox (0)

Expense Approval Process - Edit Claim

Expense Claim Details

Ref: REF-000005

Title *:

Submitted By:

Note: The title should appear in this format, example, Jan 06

Expenses Item(s)

Date	Category	Purpose	Amount	
04/06/2015	Mileage	Meeting with Client	\$ 30.00	
04/06/2015	Entertainment	Dinner with Client	\$ 80.00	

+ Total Amount

Receipt: No file chosen

3. **Datalists** (or **Lists** for short) are tables or reports in tabular format, providing features such as paging, sorting, filtering and exporting. Logout and login as **Cat's** manager **Clark**, then click on **Approver Inbox** in the menu. The page displays a datalist showing the task inbox, in this case Clark will see a pending claim from Cat.

HR Expenses Claim App

Mon, 6 Apr 2015

Logout

- Welcome
 - Welcome
- New Claim
 - New Expenses Claim
- Personal Expenses
 - Resubmission (0)
 - Draft (0)
 - Submitted (0)
 - Approved (0)
 - Rejected (0)
 - Closed (0)
- Approver Task List
 - Approver Inbox (1)

Title	Ref	Submitted By	Total	Date Created	
April 2015	REF-000005	Cat Grant	\$ 110.00	2015-04-06 15:19:06.0	Approve Claim

One item found. 1

CSV | Excel | XML | PDF

4. The task created shows a **workflow process** in action, where a task is routed to the appropriate person. The process may also involve integration to external systems such as sending emails or updating external databases. As Clark, click on the **Approve Claim** link to view and approve Cat's submission.

HR Expenses Claim App

Mon, 6 Apr 2015

Logout

- Welcome
 - Welcome
- New Claim
 - New Expenses Claim
- Personal Expenses
 - Resubmission (0)
 - Draft (0)
 - Submitted (0)
 - Approved (0)
 - Rejected (0)
 - Closed (0)
- Approver Task List
 - Approver Inbox (1)

04/06/2015	Mileage	Meeting with Client	\$ 30.00
04/06/2015	Entertainment	Dinner with Client	\$ 80.00

Total Amount \$ 110.00

Receipt

Approval

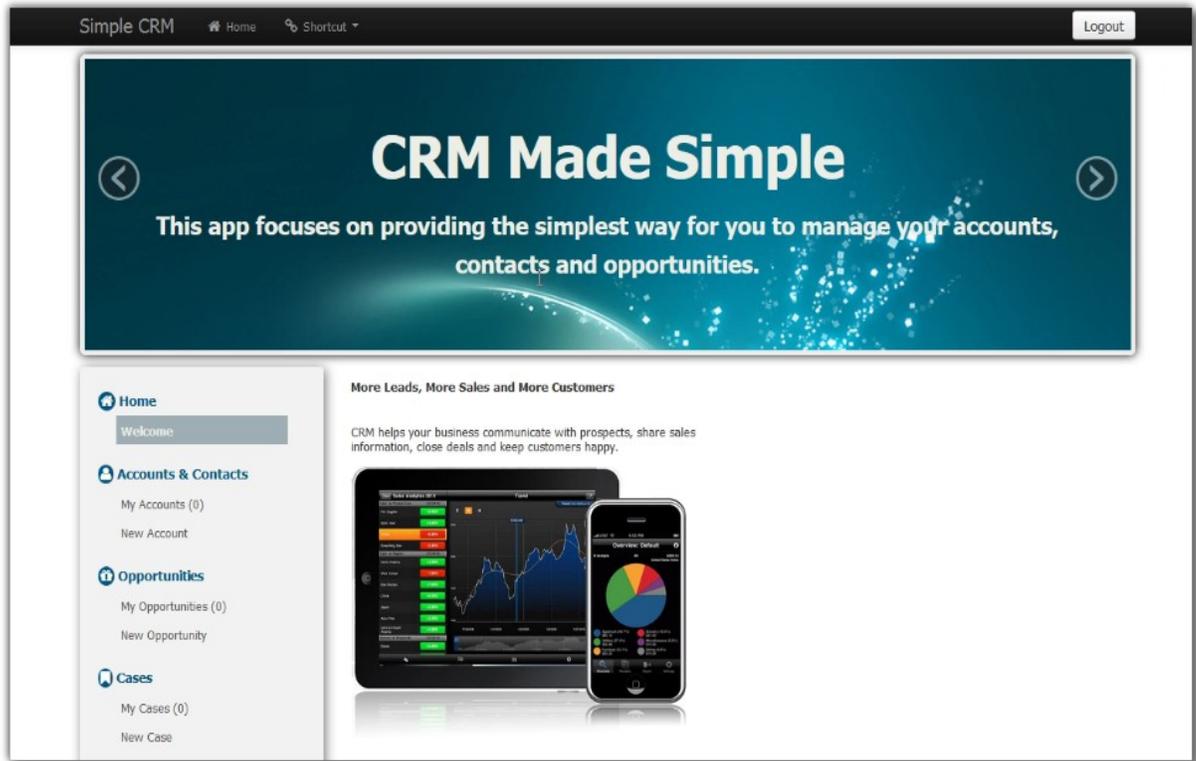
Status * Approved

Approver

Approver Comments

Save As Draft Complete

5. The **HR Expenses Claim** App demonstrates a process driven app. To see a different type of app in action, launch the **Simple CRM** in the App Center. This app is focused on data management, providing a no-frills approach to manage accounts, contacts, opportunities and cases.



6. The **Simple CRM** also demonstrates more advanced reporting capabilities such as tabular management reports and graphical charts.

Simple CRM Home Shortcut Logout

Home
Welcome

Admin and Reports
News Feed
All Accounts (1)
All Contacts (0)
All Opportunities (2)
All Case Reports (0)
Monthly Sales Forecast
Yearly Case Status

Accounts & Contacts
My Accounts (1)
New Account

Opportunities
My Opportunities (0)
New Opportunity

All Opportunities

This is the administrator screen to manage all the opportunities entered into the CRM.

10 Status -- Stage -- -- Probability -- -- Account -- Title

Projected Date From To Show

<input type="checkbox"/>	Title	Owner	Account	Amount	Status	Stage	Probability	Projected Date	<input type="checkbox"/>
<input type="checkbox"/>	Opportunity 2	cat	Client 1	500000	Pending			2013-06-20	<input type="checkbox"/>
<input type="checkbox"/>	Opportunity 1	cat	Client 1	1000000	Pending		50%	2013-05-15	<input type="checkbox"/>

2 items found, displaying all items.

1

CSV Excel XML PDF

Simple CRM Home Shortcut Logout

Home
Welcome

Admin and Reports
News Feed
All Accounts (1)
All Contacts (0)
All Opportunities (2)
All Case Reports (0)
Monthly Sales Forecast
Yearly Case Status

Accounts & Contacts
My Accounts (1)
New Account

Opportunities
My Opportunities (0)
New Opportunity

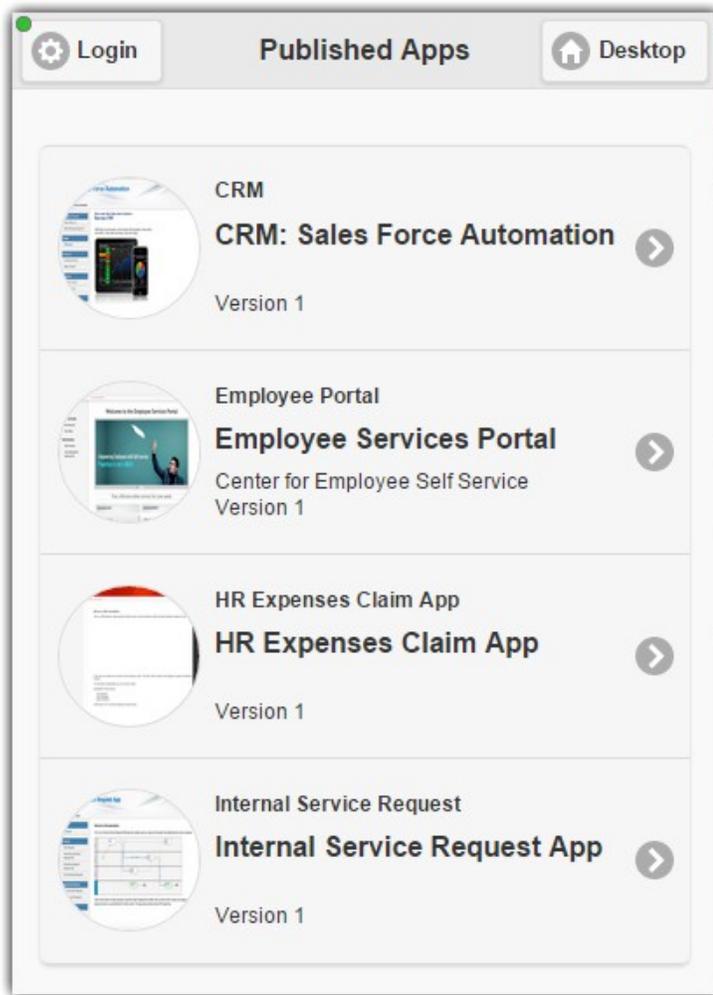
Monthly Sales Forecast

This is a report that shows the year's monthly sales forecast.

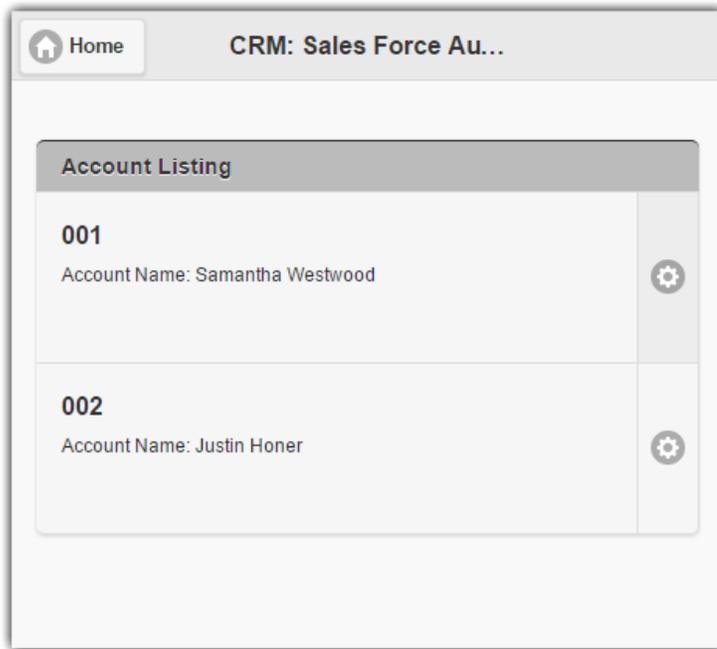
Month	Projected Revenue
1	0
2	0
3	0
4	0
5	950,000
6	500,000
7	0
8	0
9	0
10	0
11	0
12	0

3.3 Introducing the Mobile Edition

1. When accessing a Joget app from a mobile web browser (smartphone or tablet), the user will automatically be shown the mobile edition.
2. The mobile userview is presented in a mobile user experience which includes the look and feel, page transitions, some offline capabilities, etc.



3. Datalists are automatically converted from a tabular format into a more suitable mobile list format.



4. Forms are also automatically formatted accordingly.

Account Details

Account ID *

001

Account Name *

Samantha Westwood

Address Details

Address

City

State

Country

Submit

Cancel

4. Designing an App

4.1 Introducing the improved Admin Bar

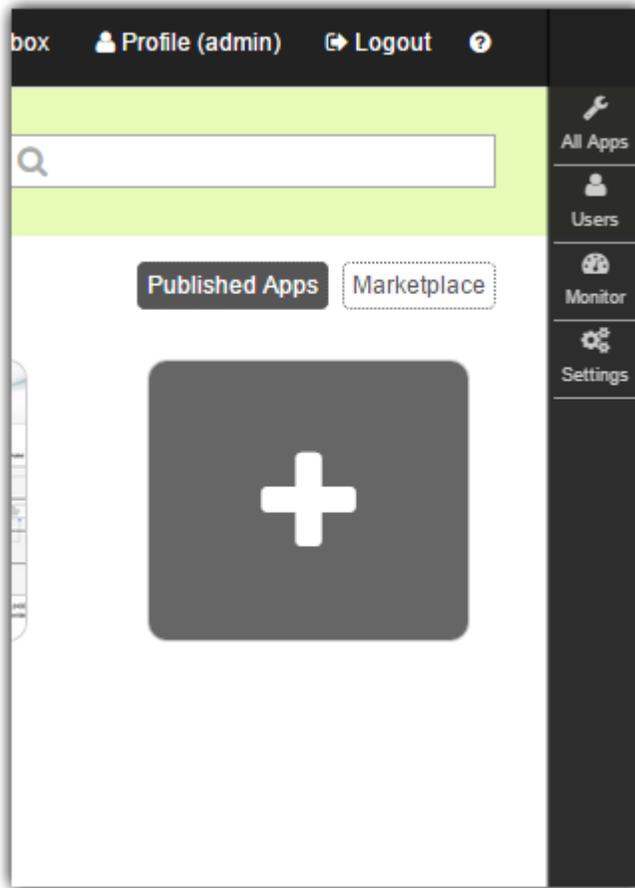
1. The **Admin Bar** is first introduced in Joget v4 that provides administrators a consistent (and convenient) way of managing apps and users. In Joget v5, we take it further and improved it making it even more intuitive than ever.
2. In the **App Center**, login as an administrator. The default administrator credential in a standard installation is as follows:

Administrator:

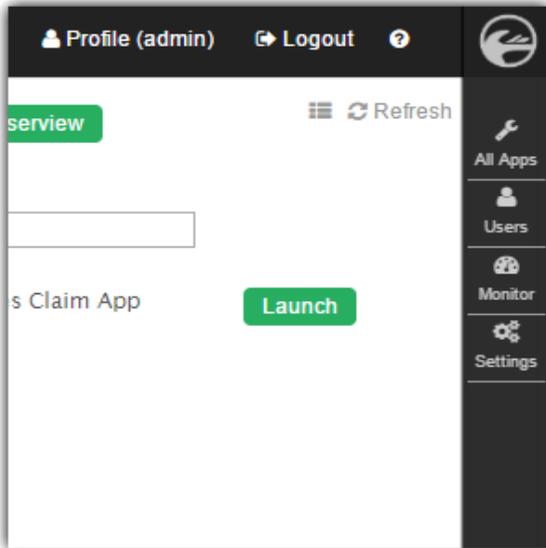
Username: admin

Password: admin

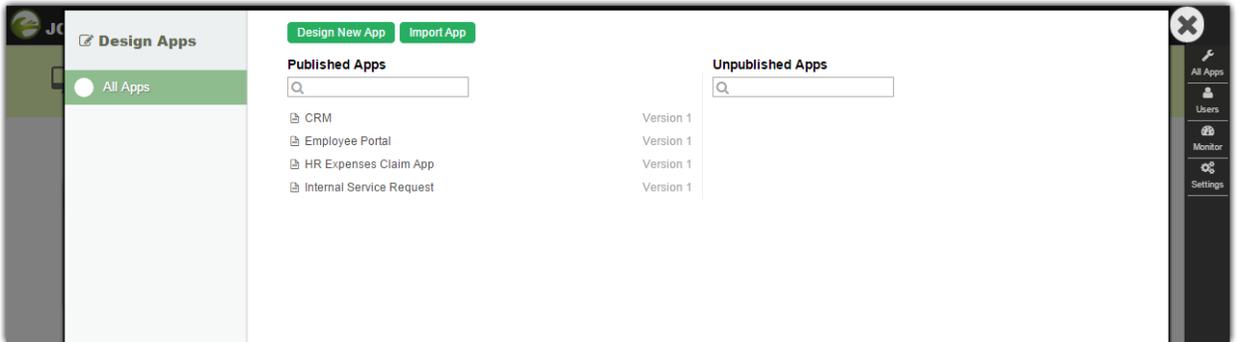
3. The Admin Bar is a black panel that appears on the right of the window.



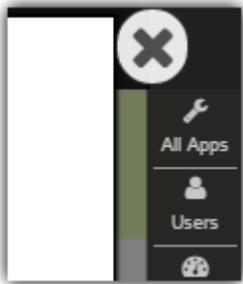
4. At any time, clicking on the **Joget logo** on the top right will bring you back to the App Center, while clicking on any of the other buttons will open an **overlay** over the current window.



5. Try clicking on **All Apps**. This opens an overlay showing all the published and unpublished apps.

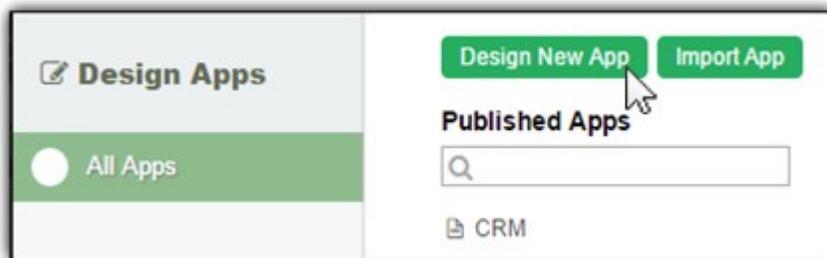


6. To close the overlay window, click on the **large X button** on the top right.

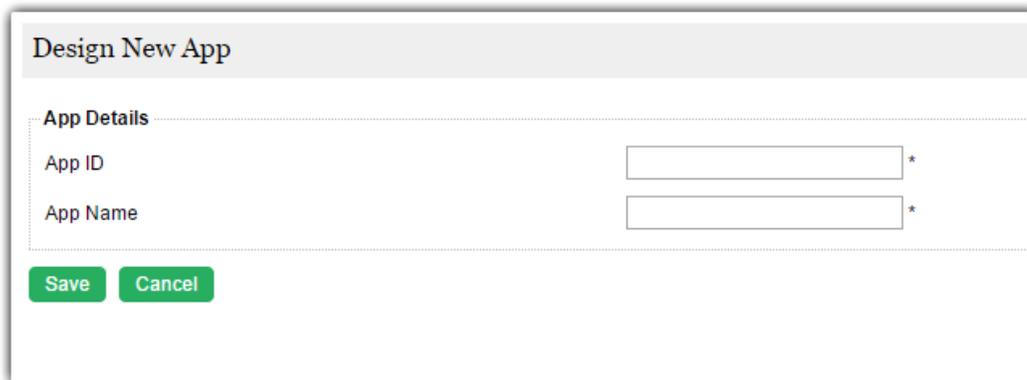


4.2 Designing a New App

1. In the **Admin Bar**, click on **All Apps**.
2. In the All Apps window, click on the **Design New App** button along the top.



3. Key in the details of the new app.

A screenshot of a form titled 'Design New App'. The form has a section for 'App Details' with two input fields: 'App ID' and 'App Name', both marked with an asterisk. Below the input fields are two buttons: 'Save' and 'Cancel'.

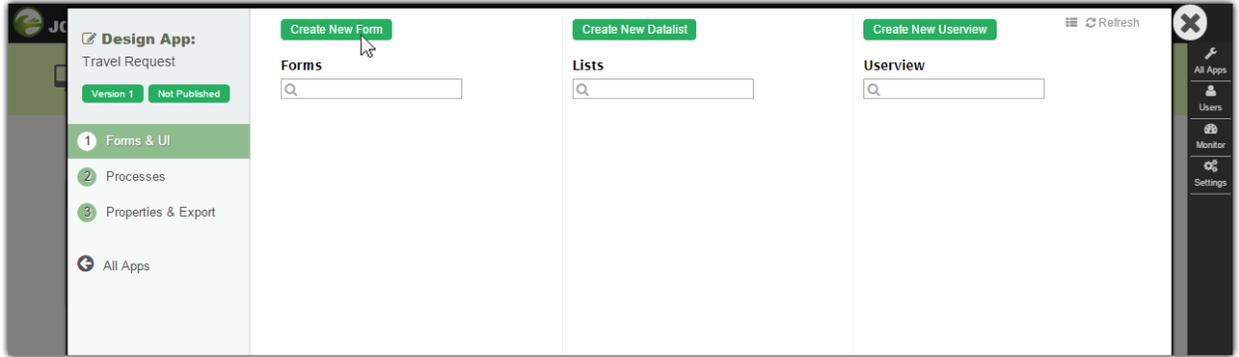
App ID: A short and unique ID for each app (no spaces) e.g. **travelRequest**

App Name: A descriptive name e.g. **Travel Request**

4. Click on **Save**. The app will be created and you will be brought to the App design page.

4.3 Designing a Form

1. In the App design page, click on the **Create New Form** button along the top.

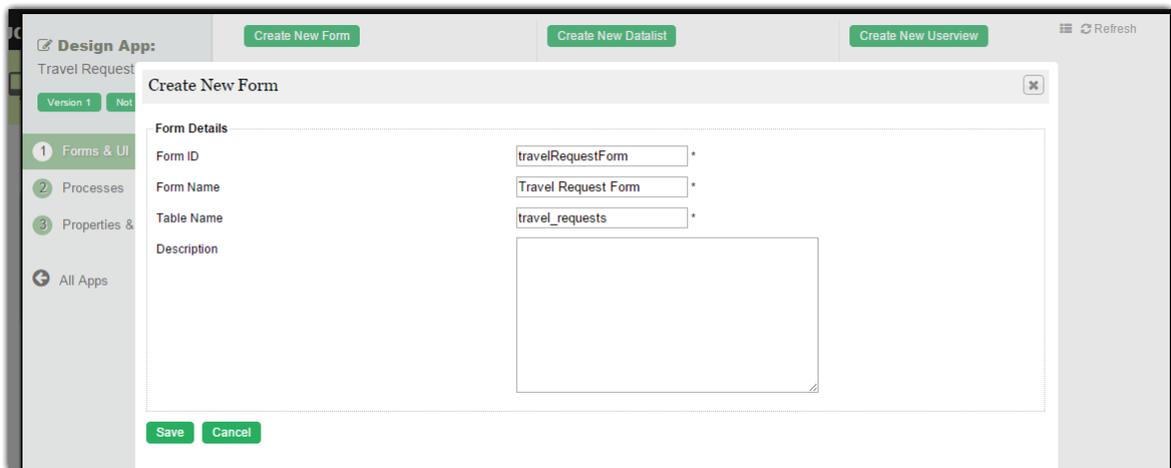


2. Key in the details of the new form.

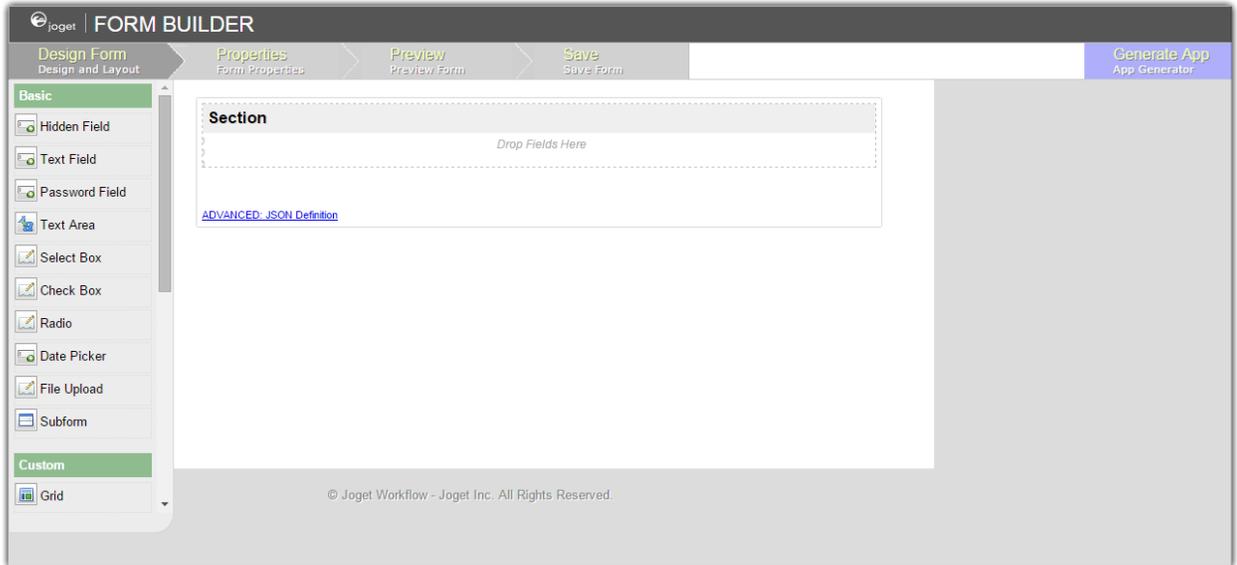
Form ID: A short and unique ID for each form (no spaces) e.g. **travelRequestForm**

Form Name: A descriptive name e.g. **Travel Request Form**

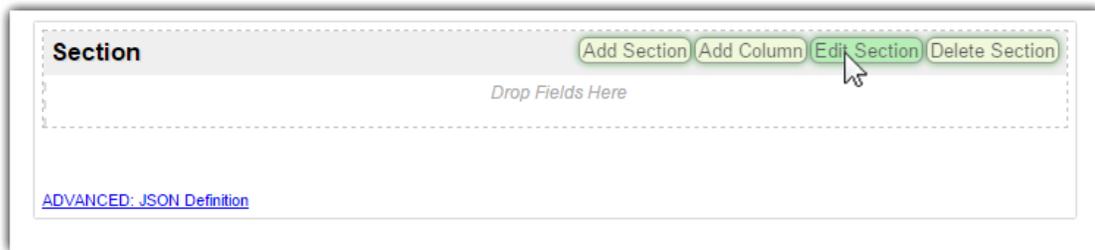
Table Name: The database table name to store the form data e.g. **travel_requests**. Note that different forms can share data by pointing to the same table name.



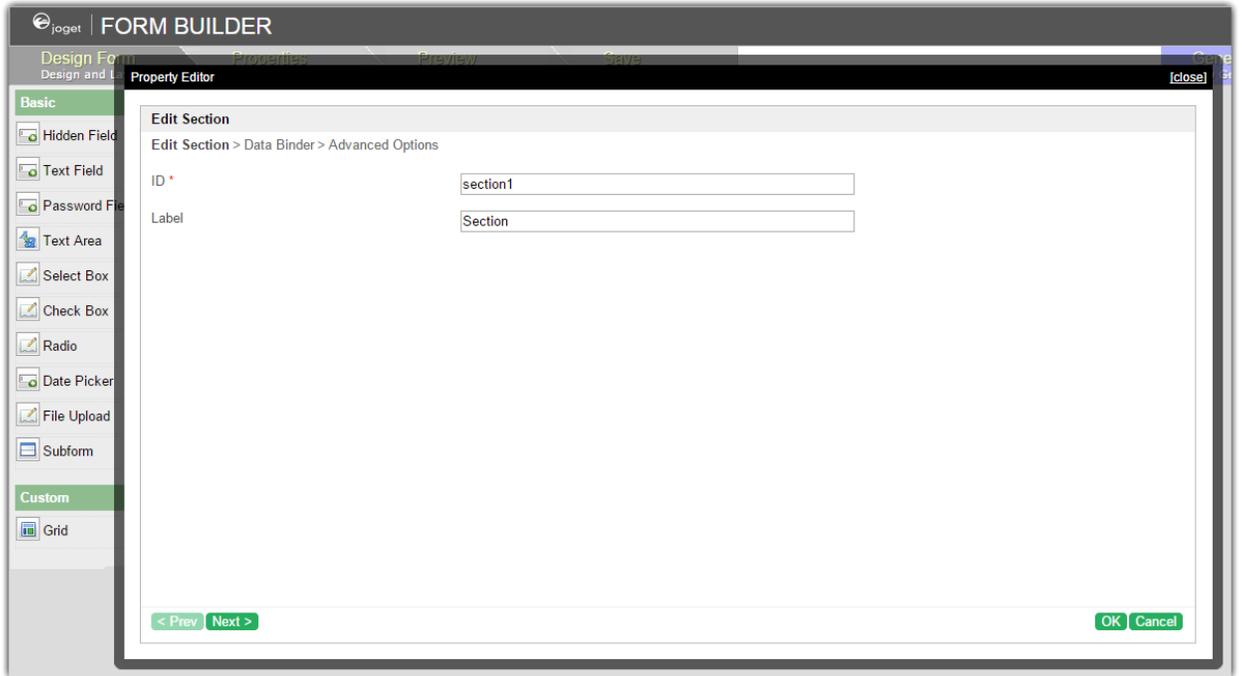
3. Click on **Save** to save the form and launch the **Form Builder** in a **new window**. If your browser blocks the popup, click on the form name to launch it.



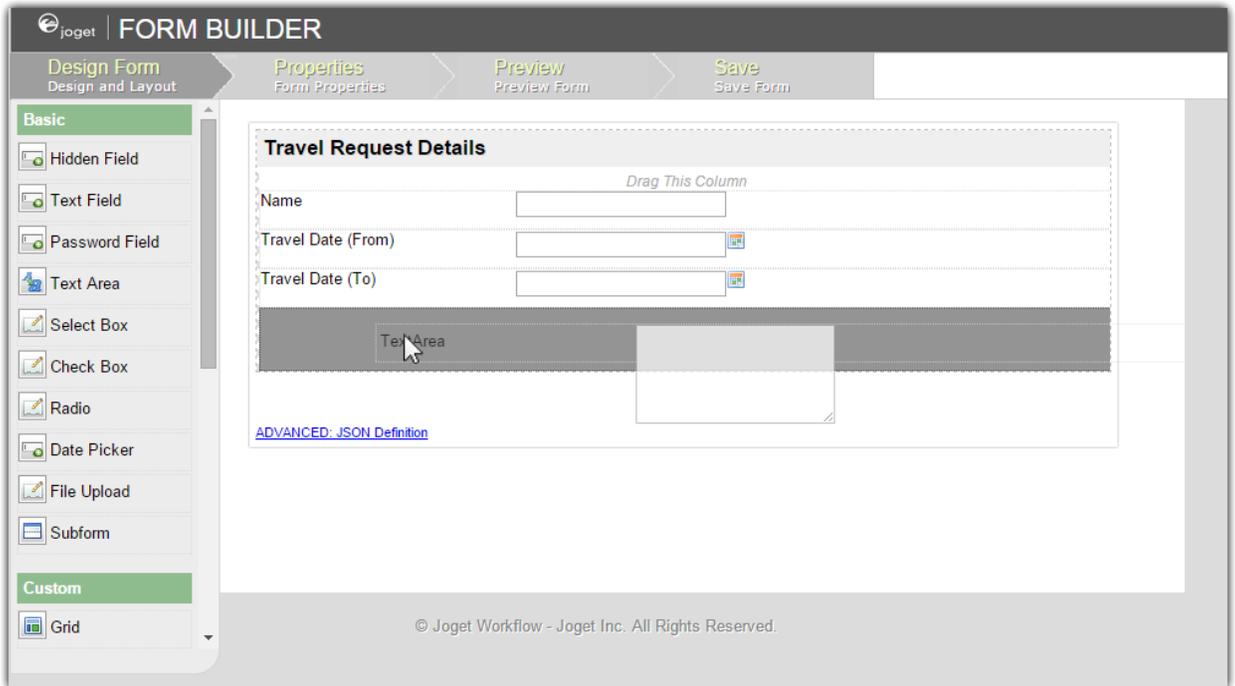
4. The first step in the Form Builder is the **Design Form** page. On the **left** is the **palette** containing available **form elements**. In the **middle** is the **canvas** containing one or more **sections**, and each section may contain one or more columns.
5. When you mouseover a section header (or any form element), buttons appear giving you options.



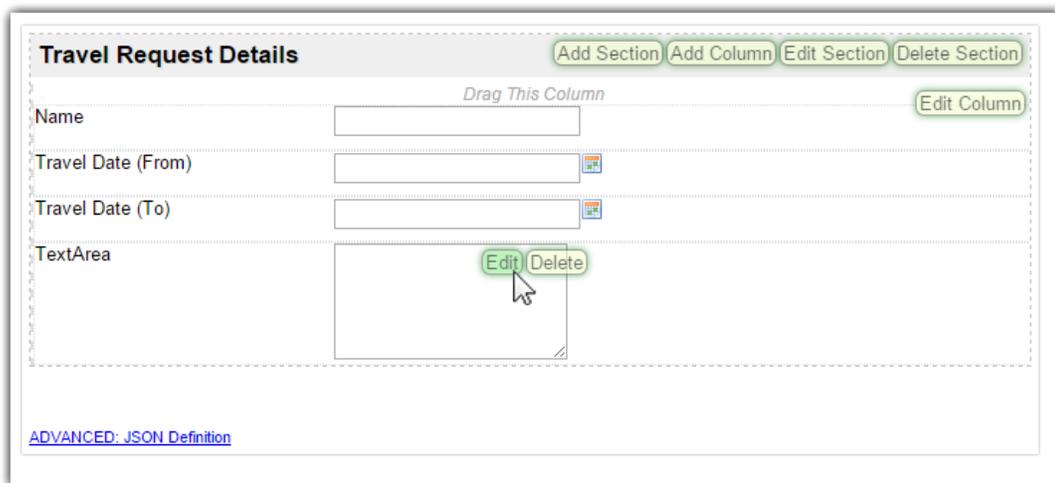
6. Click on **Edit Section**. This opens a **Property Editor** showing properties that you can modify. Each form element has different properties that can be configured.



7. Click on the **OK** at the bottom to save the property changes.
8. You can add sections using **Add Section**, and move sections around by dragging.
9. **Drag** form elements from the palette into any section.



10. Hover any form element to see the **Edit** and **Delete** options. Click on Edit to modify the form element properties.



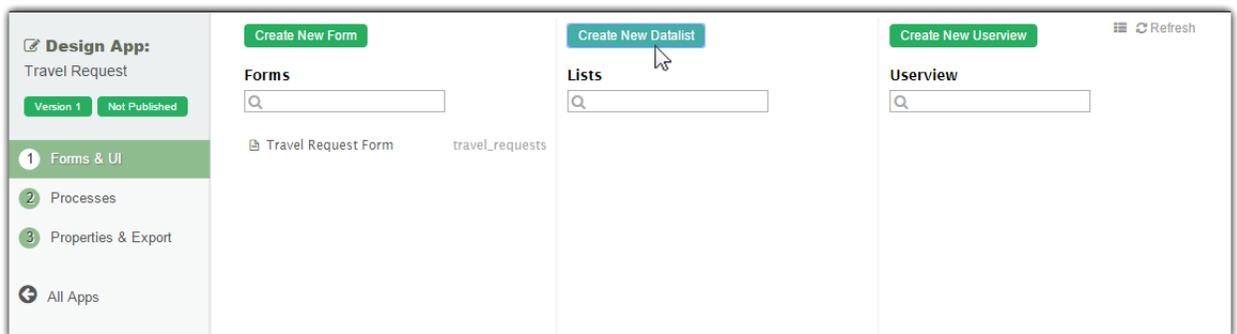
11. At any time, you may preview the form by clicking on the large **Preview** button at the

top.

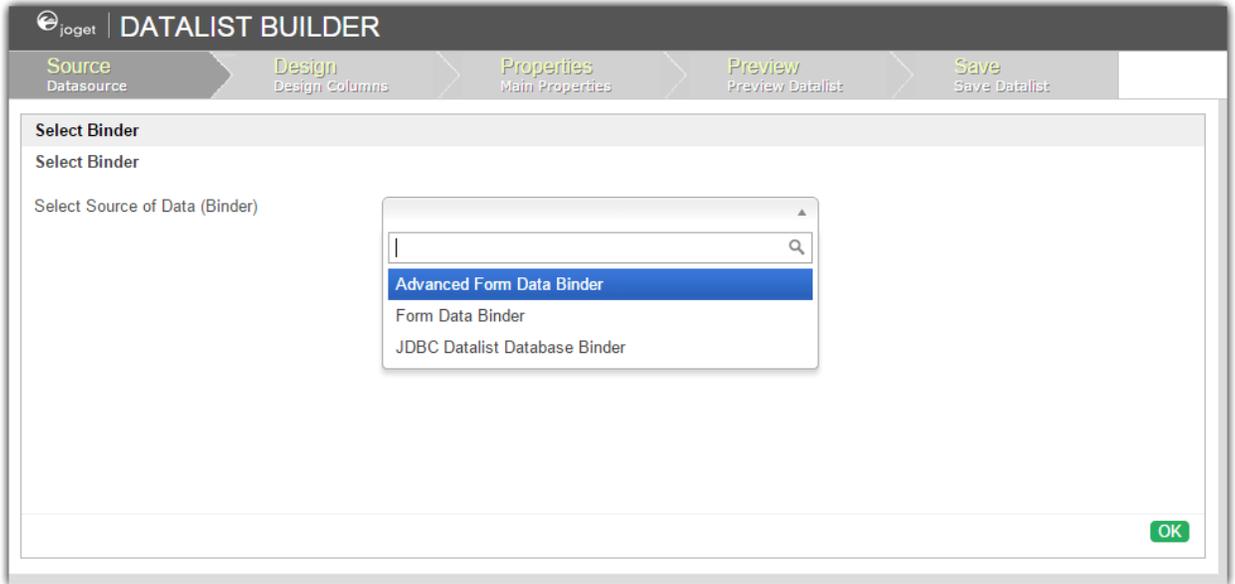
12. Once you have finished designing the form, click on the large **Save** button at the top and you will receive confirmation that the form is saved. You may then continue to design the form, or close the Form Builder window.

4.4 Designing a List

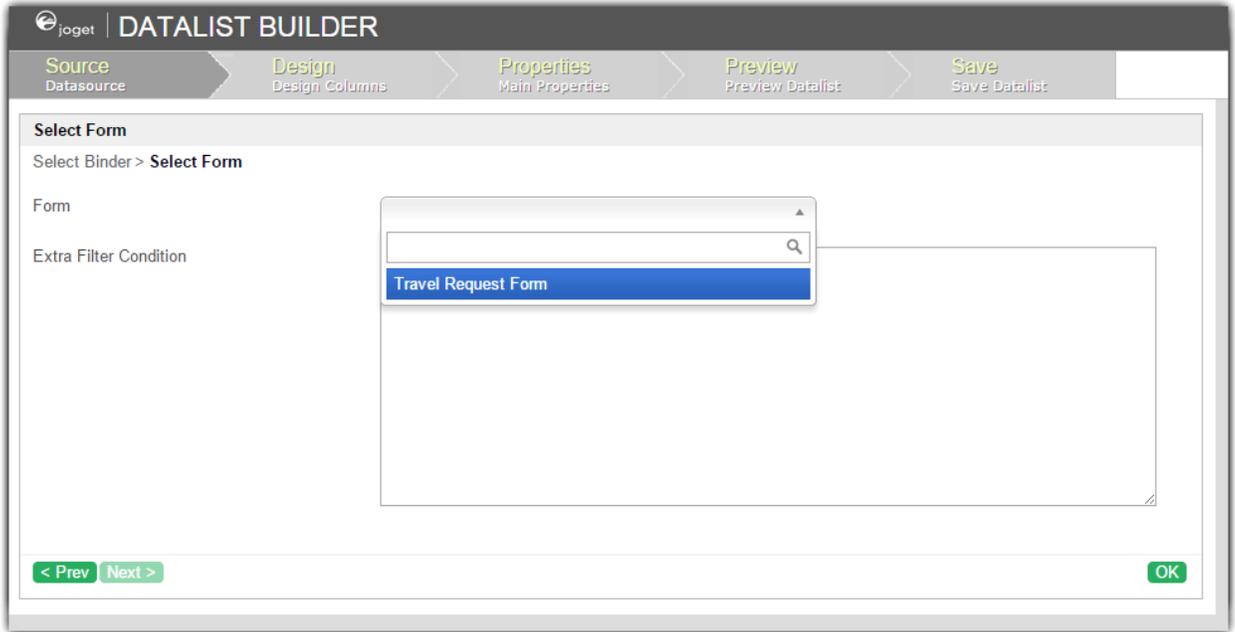
1. In the App design page, click on the **Create New Datalist** button along the top.



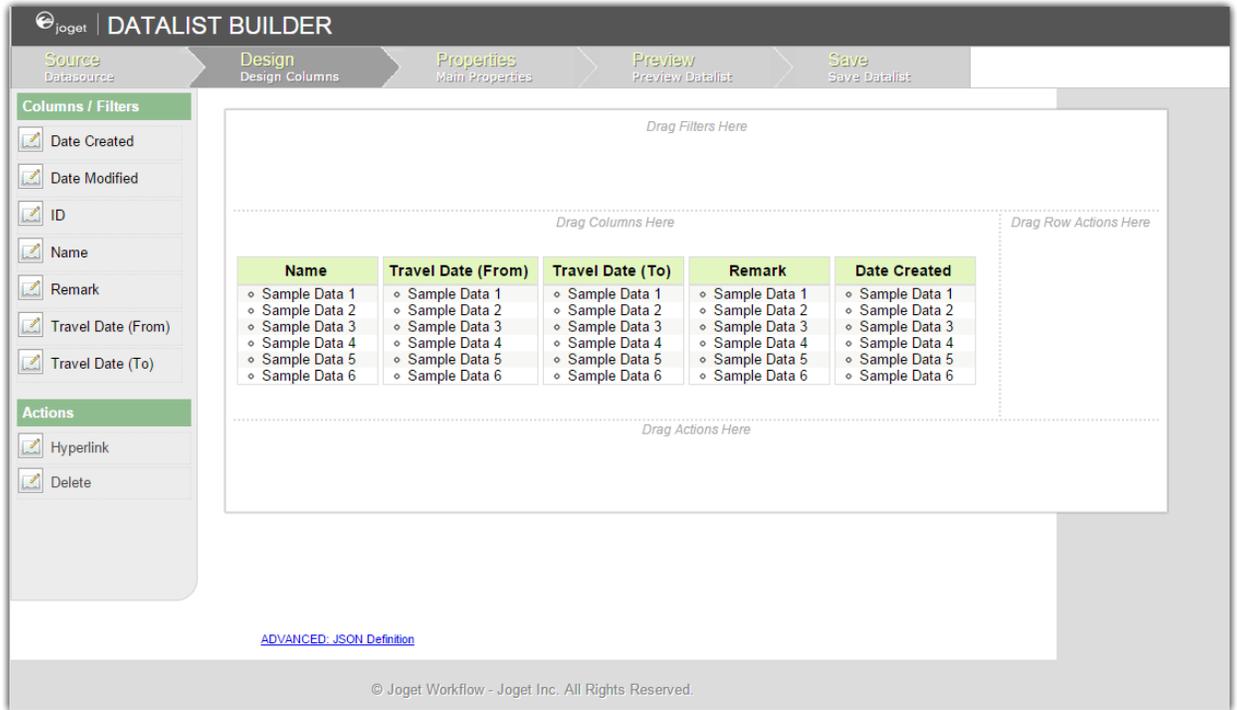
2. Key in the details of the new list.
ID: A short and unique ID for each list (no spaces) e.g. **travelRequestList**
Name: A descriptive name e.g. Travel Request List
Description: Optional description.
3. Click on **Save** to save the list and launch the **List Builder** in a **new window**. If your browser blocks the popup, click on the list name to launch it.
4. The first step in the List Builder is the **Source** page. Here, you can select the source of the data, called **Binders**.



5. Select **Form Data Binder**. This binder populates a list based on data captured from Joget forms. Once you select the binder, choose a form then click **OK** at the bottom.



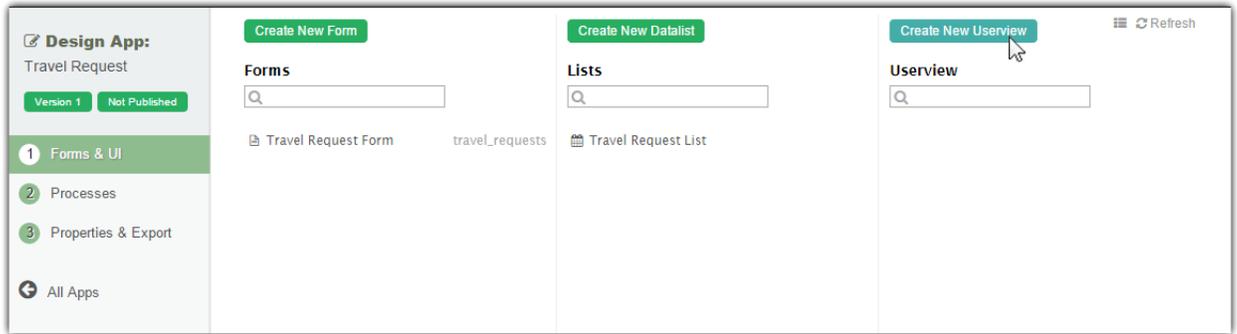
6. This brings you to the **Design** page. Here, all available columns provided by the binder are listed in the **palette** on the **left**. Drag the desired columns into the **canvas** in the **middle**.



7. When you hover over a column, buttons appear giving you options to edit or delete the column. Clicking on **Properties** opens a Property Editor showing properties that you can modify.
8. At any time, you may preview the list by clicking on the large **Preview** button at the top.
9. Once you have finished designing the list, click on the large **Save** button at the top and you will receive confirmation that the list is saved. You may then continue to design the list, or close the List Builder window.

4.5 Designing a Userview

1. In the App design page, click on the **Create New Userview** button along the top.

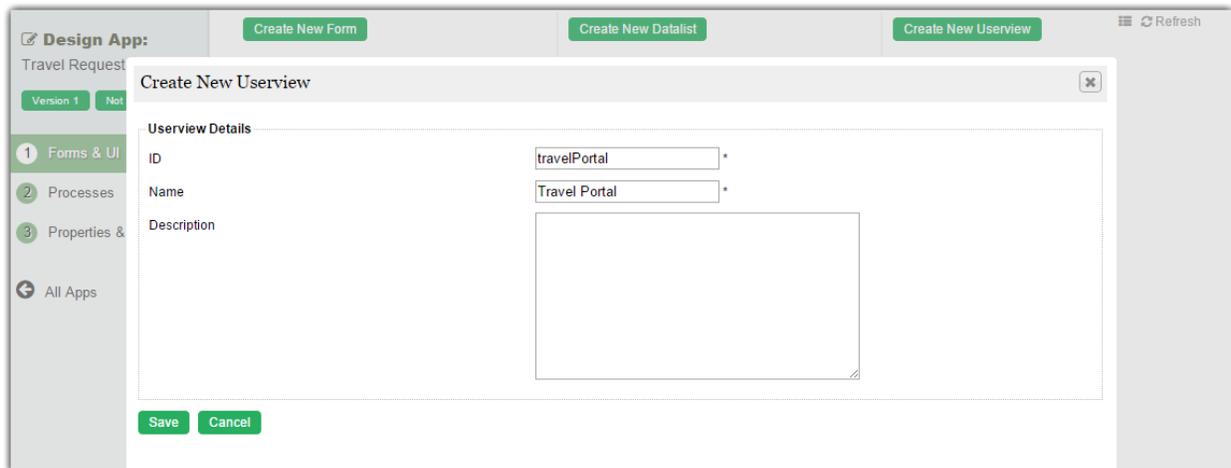


2. Key in the details of the new userview and click on the **Save** button.

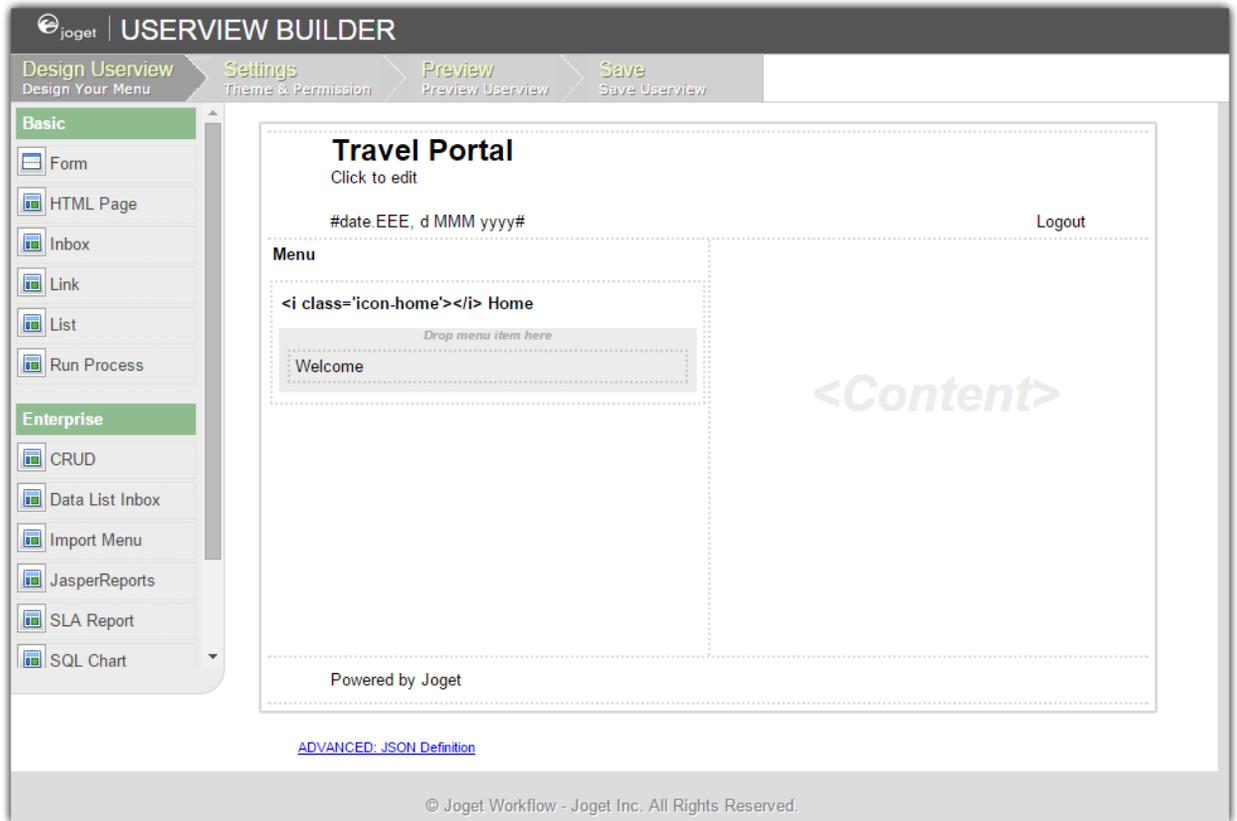
ID: A short and unique ID for each userview (no spaces) e.g. **travelPortal**

Name: A descriptive name e.g. Travel Portal

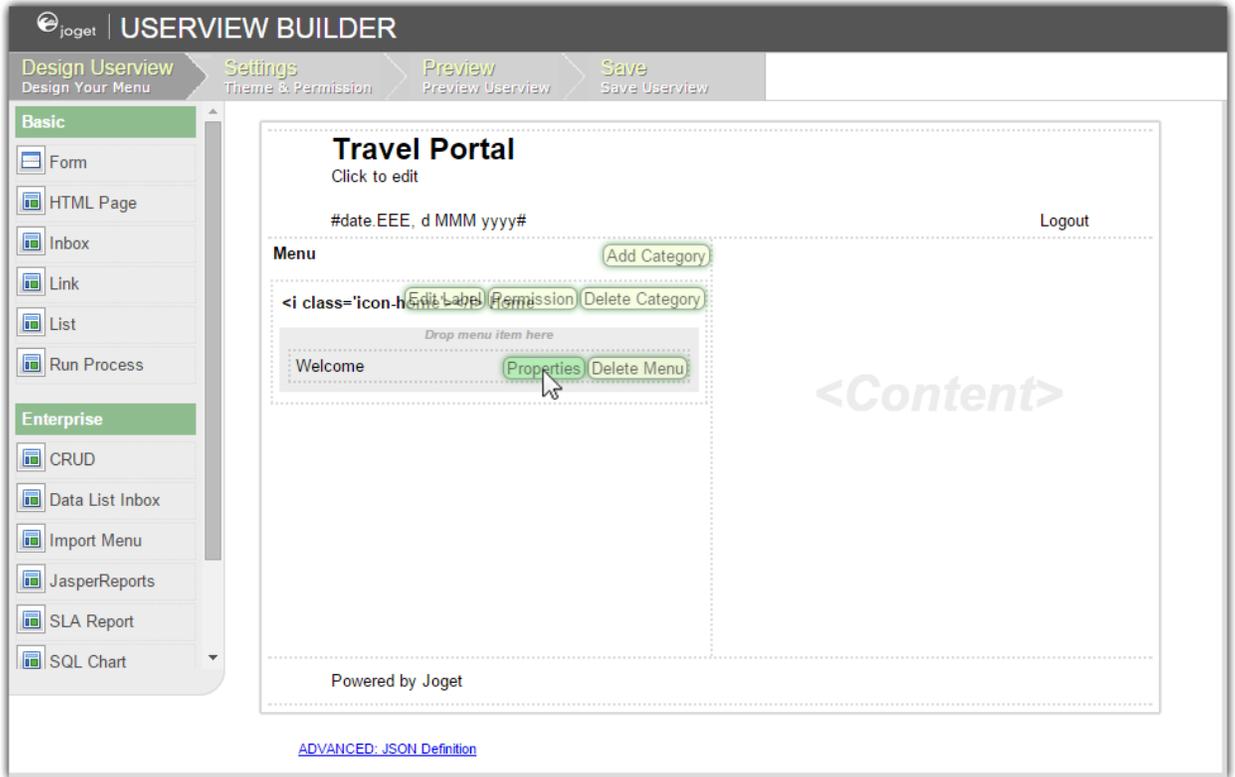
Description: Optional description.



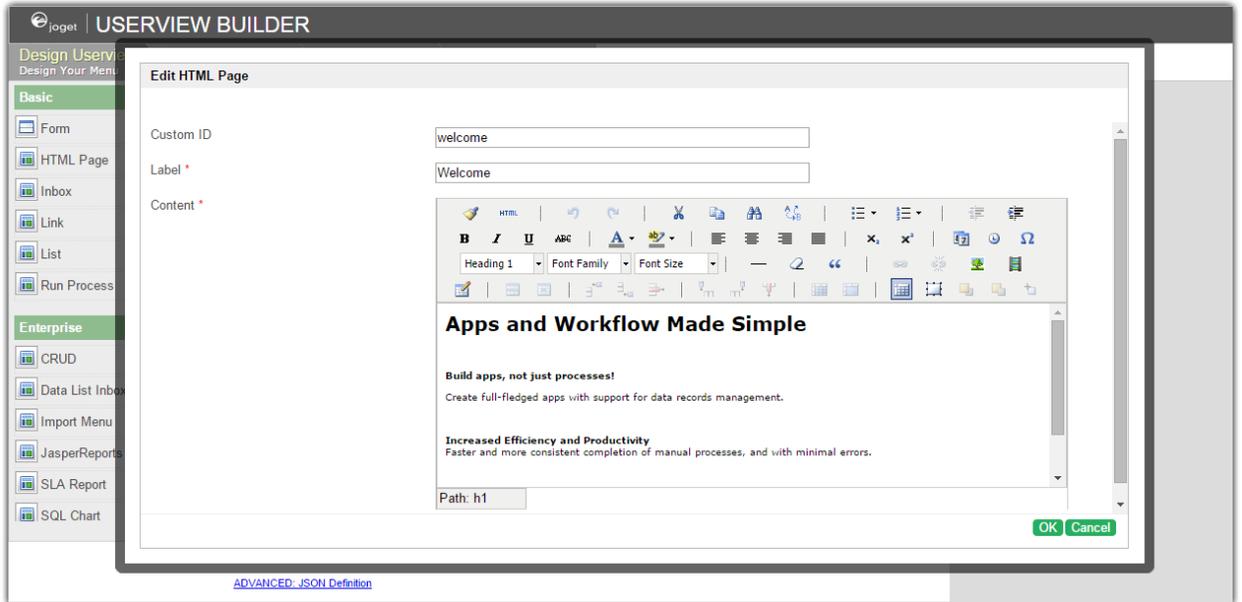
3. Click on **Save** to save the userview and launch the **Userview Builder** in a new window. If your browser blocks the popup, click on the form name to launch it.
4. The first step in the Userview Builder is the **Design Userview** page. On the **left** is the **palette** containing available **menu elements**. In the middle is the canvas containing the userview **header**, **footer** and one or more **menu categories**.



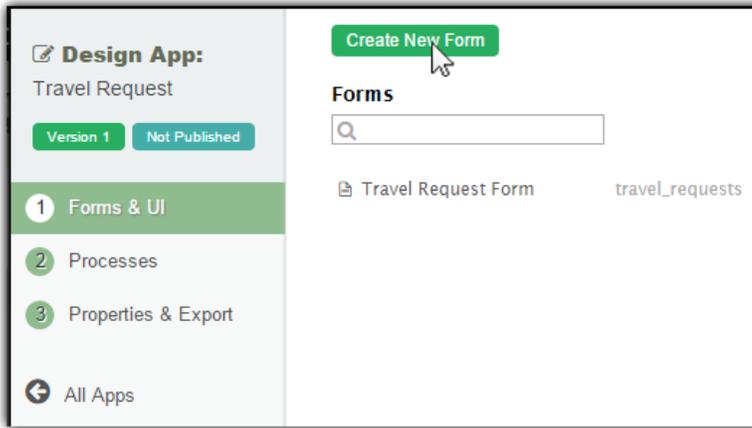
5. When you hover over the canvas **Menu**, a button will appear giving you the option to **Add Category**.
6. You can click any category name to edit it, and drag categories up and down.
7. **Drag** menu elements from the palette into any category.
8. Hover over any category or menu element to see the available options.



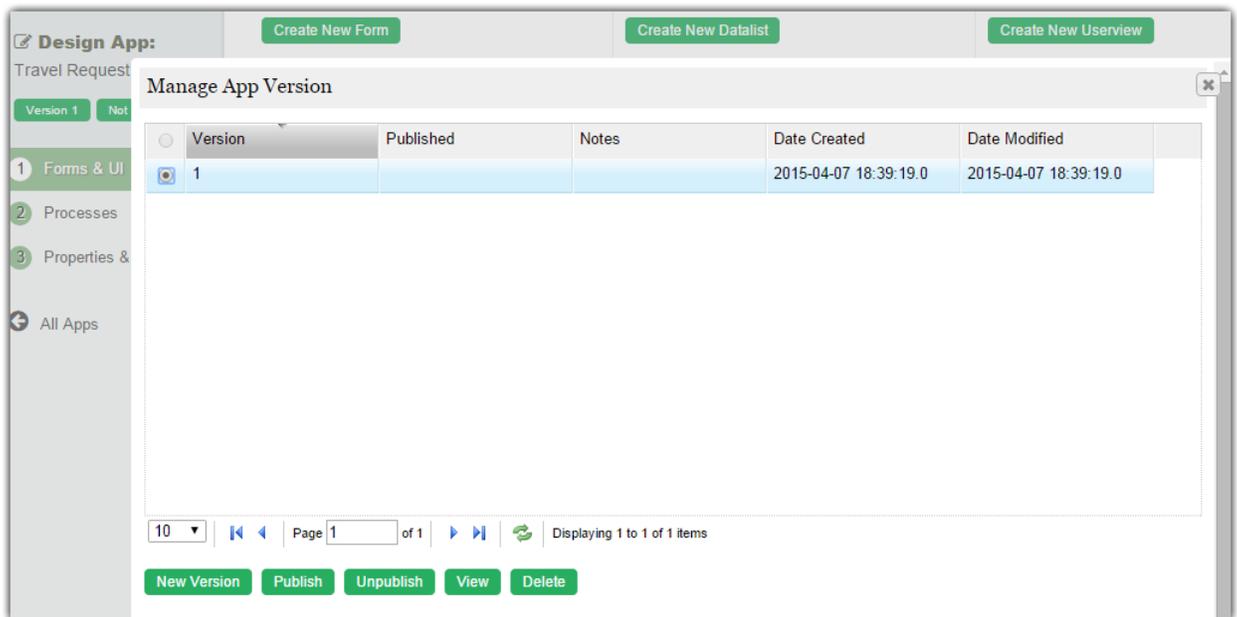
9. Click on **Properties** button to modify each menu element's properties.



10. At any time, you may preview the userview by clicking on the large **Preview** button at the top.
11. Once you have finished designing the userview, click on the large **Save** button at the top and you will receive confirmation that the userview is saved. You may then continue to design the userview, or close the Userview Builder window.
12. Before a userview can be accessed by a normal user, the app needs to be published. To do that, click on the **Not Published** or **Versions** link on the left in the App design page.



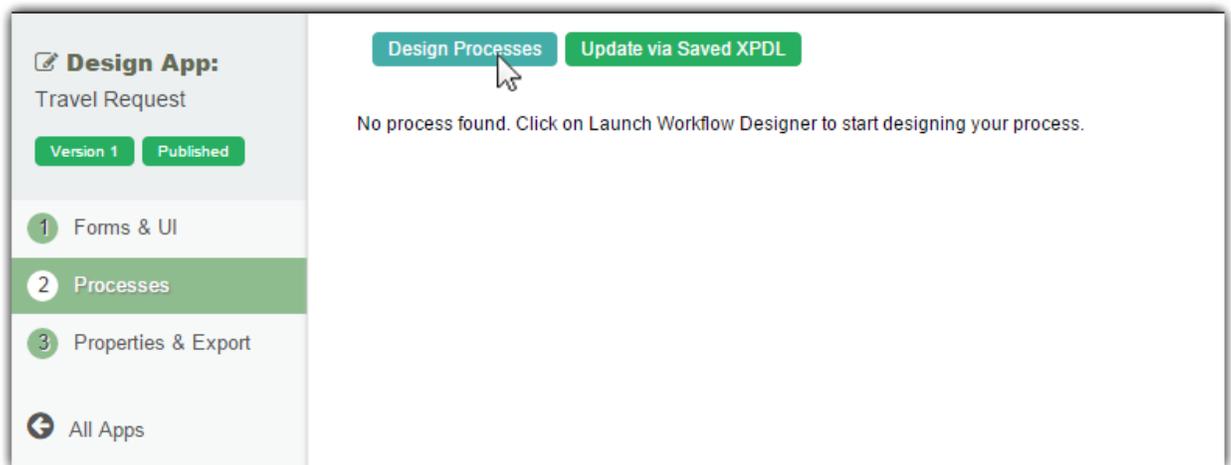
13. A popup displays all versions of the app. Select the radio button next to the latest version and click on the **Publish** button. Once an app is published, its userviews will be available in the App Center.



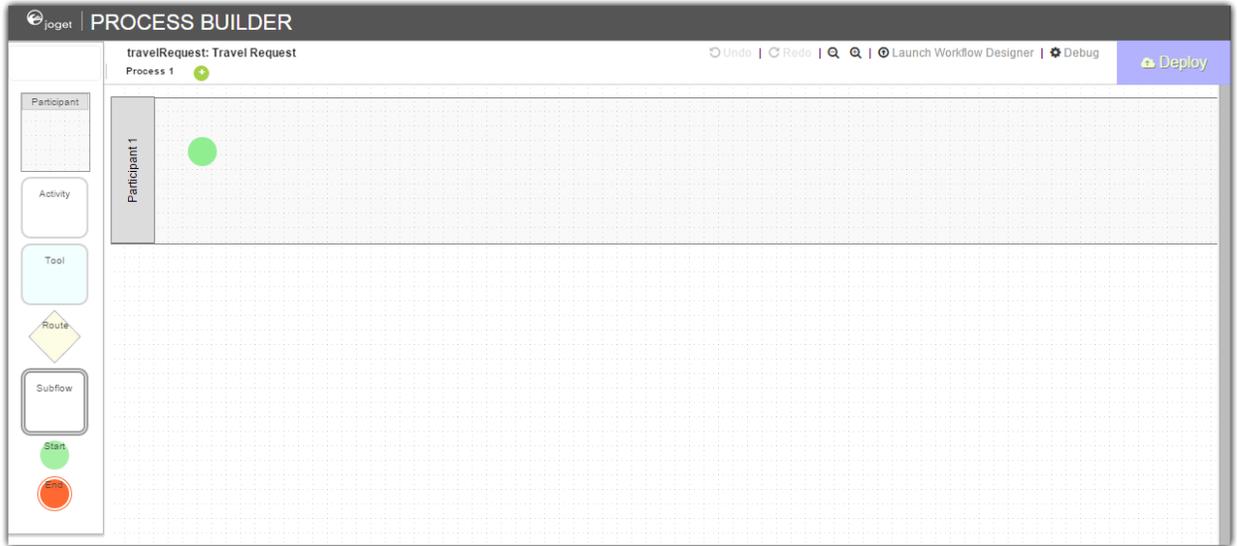
4.6 Designing a Process

4.6.1 Introducing the new Process Builder

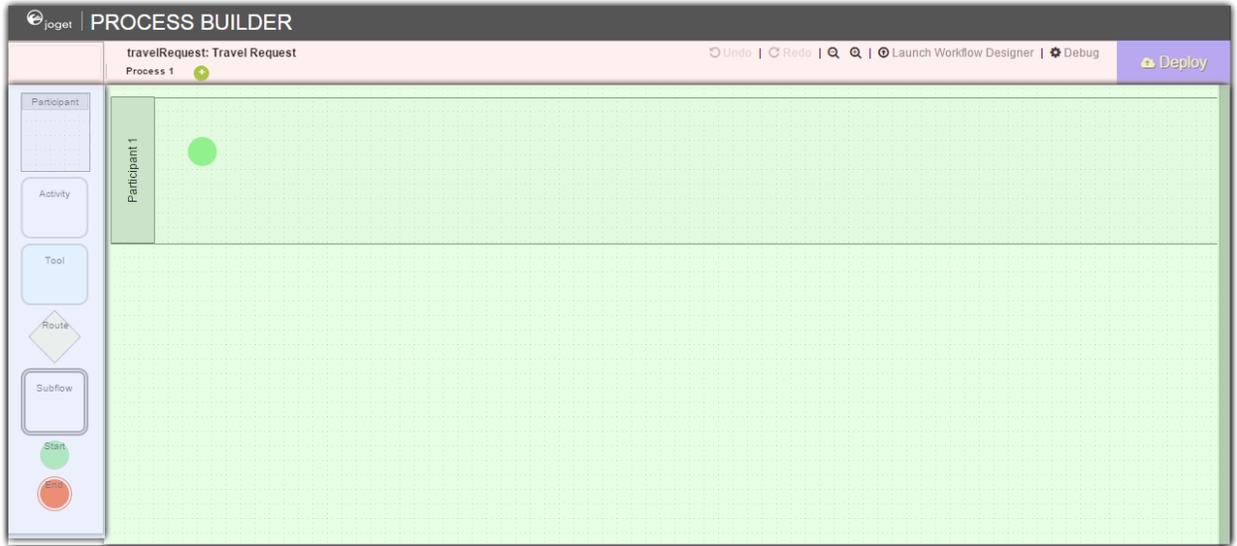
1. In the App design page, click on the **Processes** menu on the left, and then on the **Design Processes** button along the top.



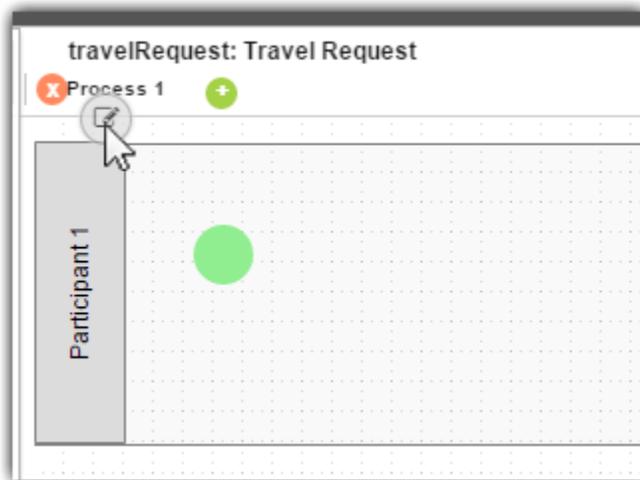
2. The **Process Builder** is one of the main highlights in Joget v5 replacing the older **Workflow Designer**.

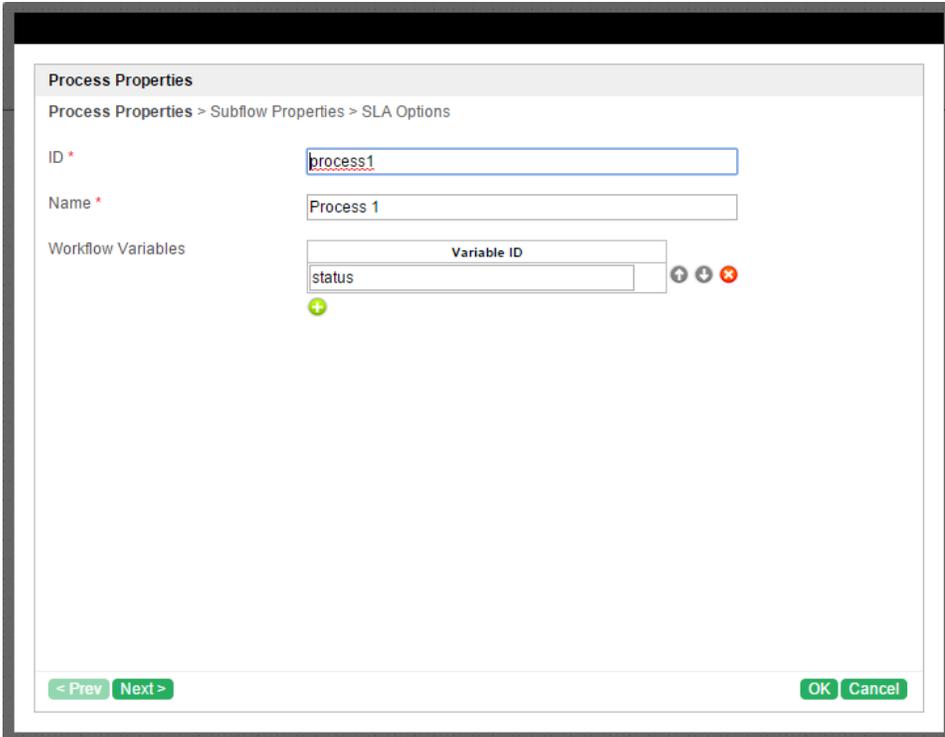


3. There are 3 main areas in the Process Builder. On the top (red), the **Navigator** panel contains a list of processes together with the action buttons on the right.
On the left (blue), this is where the element palette is placed by default. One can move it around to suit one's style.
The main panel in the middle is the **Graph** area (green) that contains the actual process diagram.

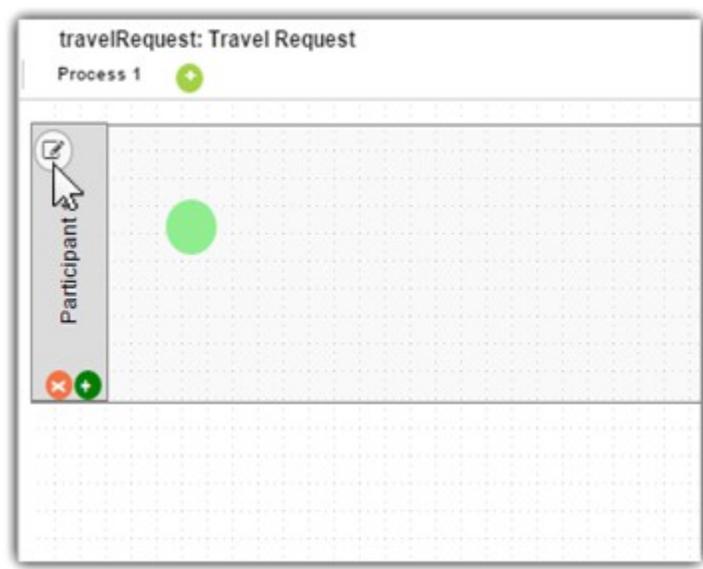


4. Click on the edit icon under the process name in the Navigator. This brings up the properties dialog where you can edit the process details.





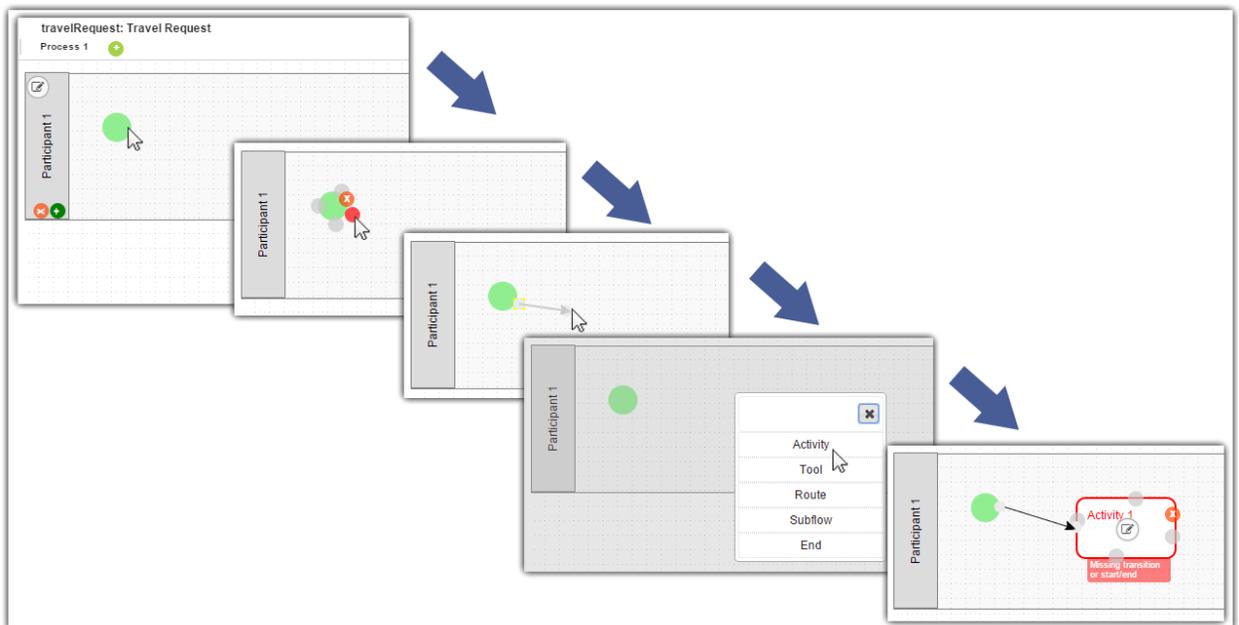
5. Add **Participants** into the process by clicking on the green add button under current Participant. Participants represent users or roles that perform a certain task. Click on the edit button while hovering over the participant name to set its properties.



6. Add **activities, tools** and **routes** into the process diagram. Activities represent forms which require human interaction. Tools represent system or automated tasks, and routes

are decision points. Use **transitions** to link them all together in a flow.

You may either expand your design by connecting from existing nodes or by dragging the required nodes from the element palette into the process diagram.

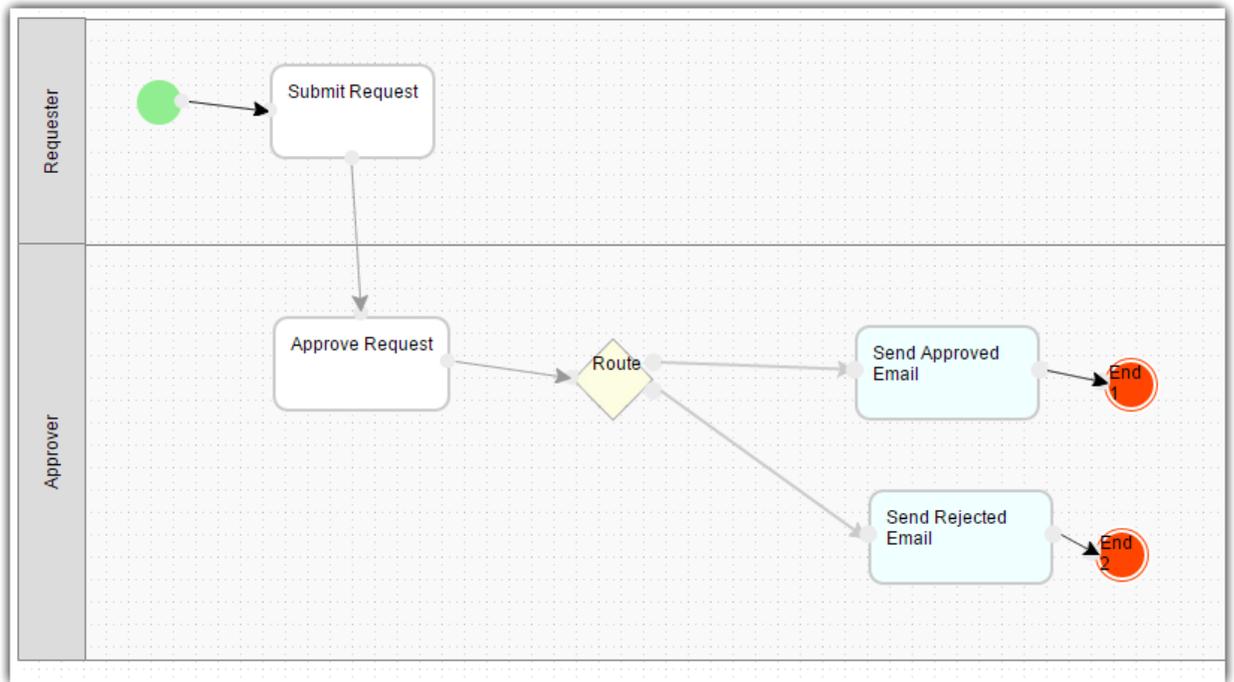


joget | **PROCESS BUILDER**

travelRequest: Travel Request

Process 1 +

The screenshot displays the Joget Process Builder interface for a process named "travelRequest: Travel Request". On the left, there is a vertical toolbar with three categories: "Participant", "Activity", and "Tool". The main workspace is a grid with a yellow background. A vertical bar on the left of the workspace is labeled "Participant 1". A green circle representing a start node is connected by an arrow to a red-bordered rounded rectangle labeled "Activity 1". Below "Activity 1", a red error message reads "Missing transition or start/end". To the right of "Activity 1" is another rounded rectangle labeled "Activity".



- To handle routing (for example approval conditions), use **Routes** in combination with **workflow variables**. To create a workflow variable, double click on the process name in the Navigator to bring up the process dialog. Click on the first small icon under the Workflow variable heading, and key in the ID of the variable e.g. **status**.

Process Properties
 Process Properties > Subflow Properties > SLA Options

ID *

Name *

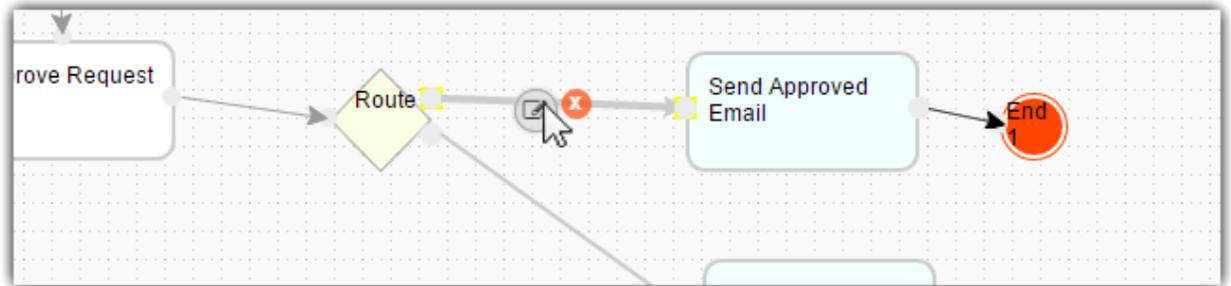
Workflow Variables

Variable ID
status

⬆ ⬇ ✖ +

- Once a workflow variable has been defined, **hover over** on a transition and **click** on the

edit icon to open the transition dialog.



9. In the transition dialog, select type **Condition**, select the variable **status** in **Variable** and key in **Approved** into the **Value** field. This means that this transition will occur if the value of status is “Approved”.

Transition Properties

Name

Style Straight Orthogonal

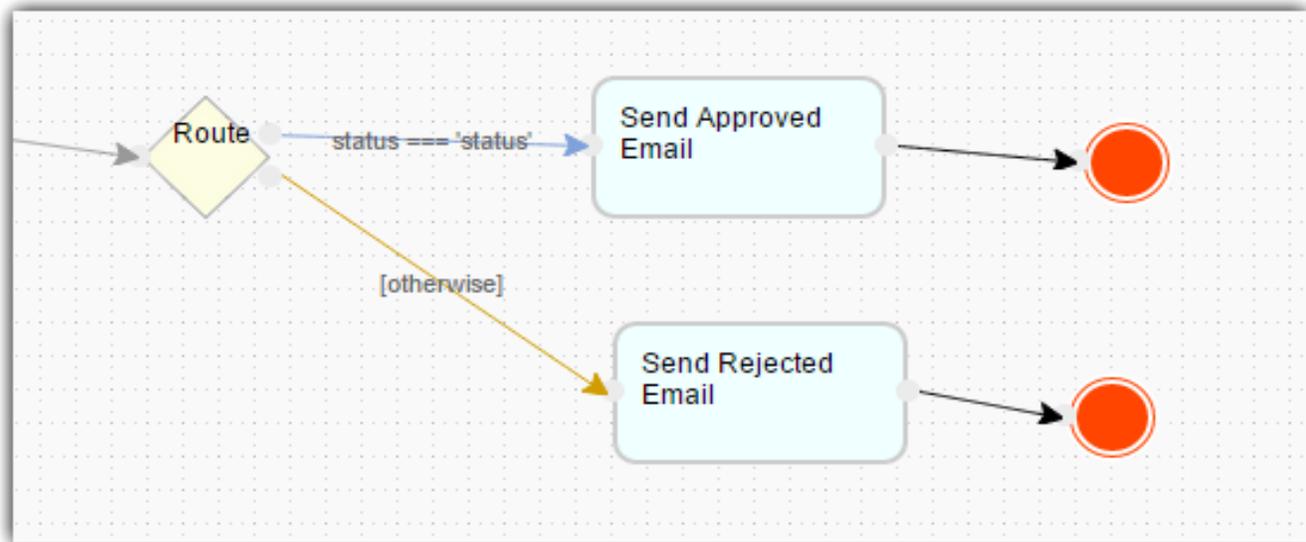
Type

Use Condition Helper

Conditions *

Join	Variable	Operation	Value
AND	status	Equal To	Approved

10. Set the transition type to **Otherwise** to indicate that it is the default path to take when other conditions are not met. The Otherwise transition is shown in orange. An example of a simple routing process is as shown below:



11. Ensure that the process has a proper **Start** and **End**. Click on **Deploy** to deploy the process to the server.

4.6.2 Mapping Participants to Users

1. Once a process has been successfully deployed, return to the previous tab/window. The new process diagram will be generated after you click on **OK**. Joget will interpret the process diagram and load the process details.

The screenshot displays the 'Design App' interface for a 'Travel Request' process. The left sidebar contains navigation options: 'Forms & UI', 'Processes' (selected), 'Properties & Export', and 'All Apps'. The main area shows the process name 'Travel Request Process' and a workflow diagram. The diagram starts with a 'Requester' participant performing a 'Submit Request' activity, followed by an 'Approve Request' activity performed by an 'Approver' participant. This leads to a 'Route 1' decision diamond. From the diamond, two paths emerge: one labeled 'status == value' leading to 'Send Approved Email', and another labeled '[otherwise]' leading to 'Send Rejected Email'. Below the diagram, there are four tabs: 'Map Participants to Users' (selected), 'Map Activities to Forms', 'Map Tools to Plugins', and 'Variable List'. The 'Map Participants to Users' tab shows a list of participants defined in the workflow design: 'Requester' (ID: requester) and 'Approver' (ID: approver). Each participant has an 'Add/Edit Mapping' button next to it.

- Participants defined in the process are listed in the **Map Participants to Users** tab, and you can map each participant to specific people. Click on **Add/Edit Mapping** to map to specific groups, users, organization chart, etc. If no mapping is done for a participant, any tasks are automatically defaulted to the current user instead.

Map Participants to Users - Approver (approver) ✕

Filter By Organization

Search

<input type="checkbox"/>	Username	First Name	Last Name	Email
<input type="checkbox"/>	admin	Admin	Admin	
<input type="checkbox"/>	cat	Cat	Grant	
<input type="checkbox"/>	clark	Clark	Kent	
<input type="checkbox"/>	david	David	Cain	
<input type="checkbox"/>	etta	Etta	Candy	
<input type="checkbox"/>	jack	Jack	Drake	
<input type="checkbox"/>	julia	Julia	Kapatelis	
<input type="checkbox"/>	roy	Roy	Harper	
<input type="checkbox"/>	sasha	Sasha	Bordeaux	
<input type="checkbox"/>	tana	Tana	Moon	

Page of 2

 Displaying 1 to 10 of 12 items

4.6.3 Mapping Activities to Forms

1. In the **Map Activities to Forms** tab, all process activities are listed.
2. For each activity, click on **Add/Edit Form** to select from a list of current forms in the app.

Map Activities to Forms - Submit Request (submitRequest) ✕

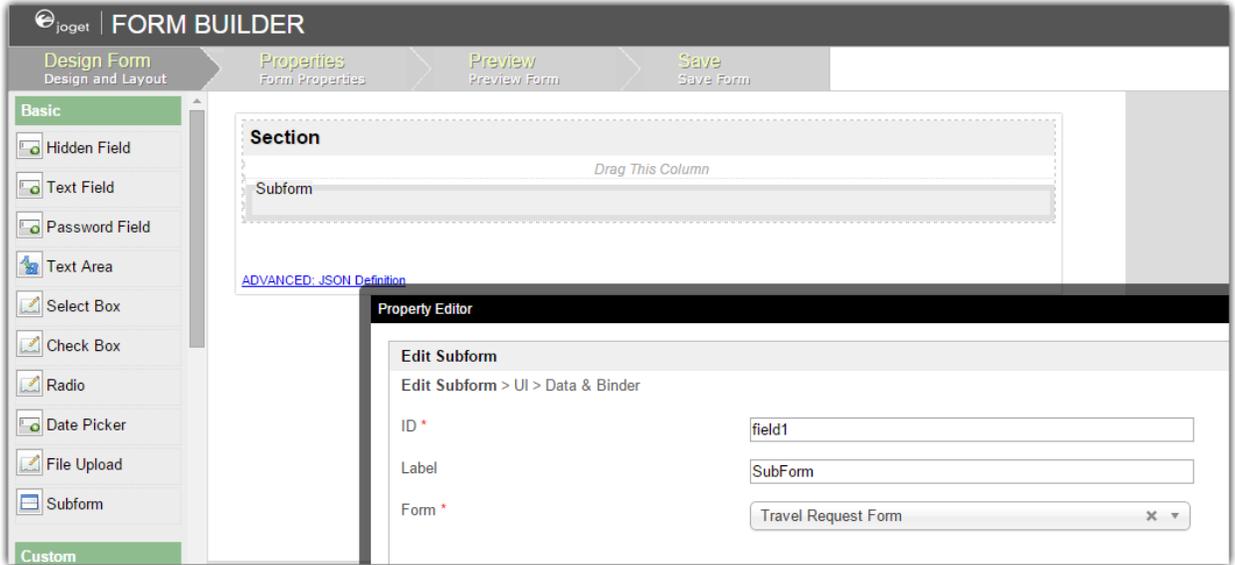
Search

Form Name	Table Name	Date Created	Date Modified
Travel Request Form	travel_requests	2015-04-07 18:44:44.0	2015-04-07 20:45:30.0

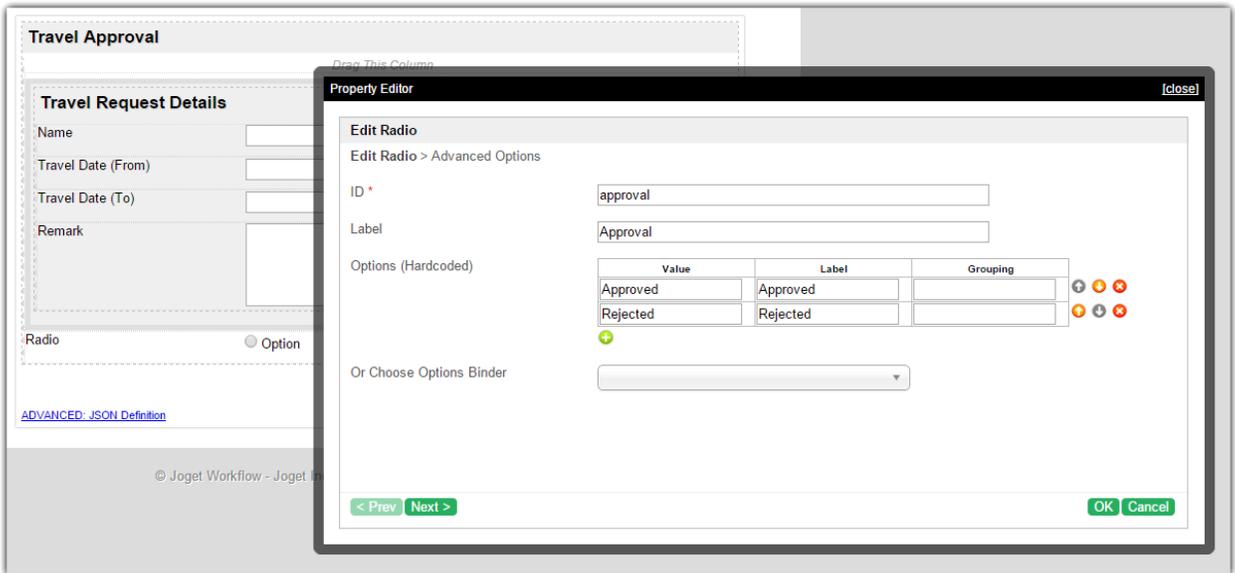
Page of 1

 Displaying 1 to 1 of 1 items

3. As an example to handle an approval process, click on **Create New Form** to create a new **Approval** form. In this new form, add a **Subform** that displays the original submitted form, and **radio** buttons to capture the approval status.
4. Configure this subform to select the original request form.



5. Configure the **status** radio button to have Approved and Rejected options.



6. For routing purposes, an important setting in the radio button is the mapping to a **workflow variable** under **Advanced Options**. In this case, setting the mapping to **status**

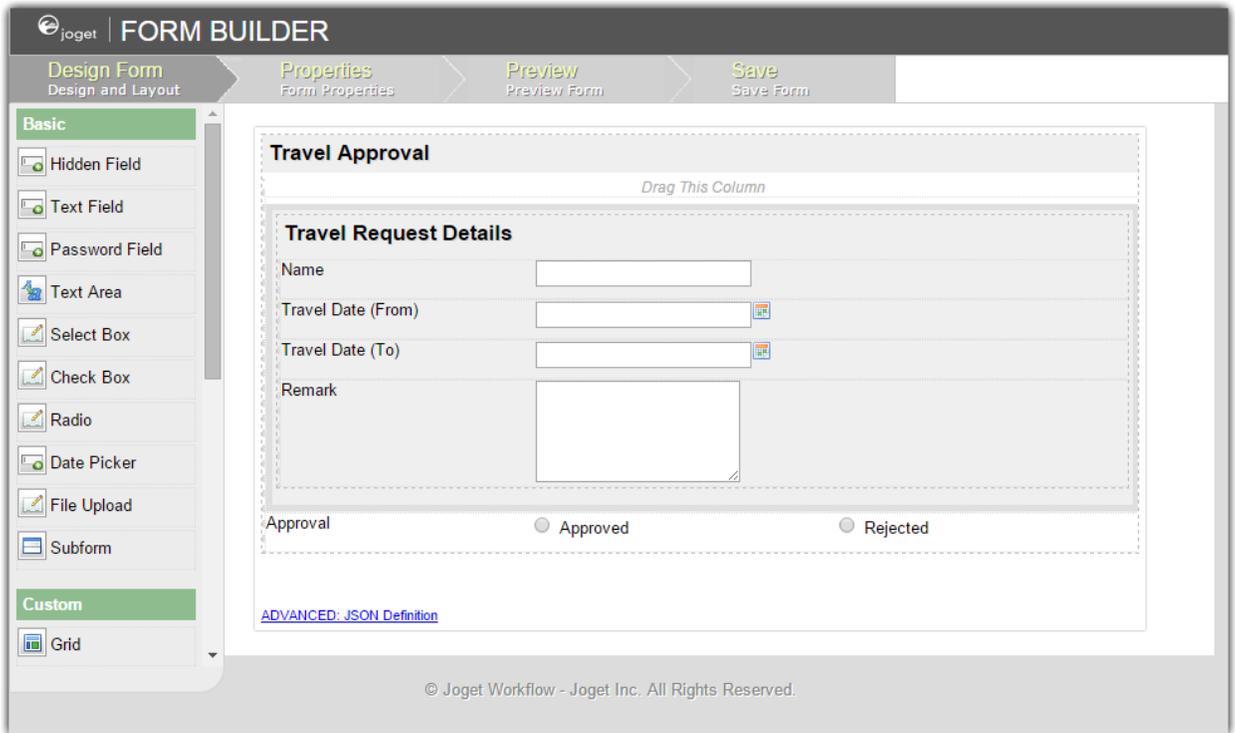
means that the value will be stored in the **status** workflow variable.

The screenshot shows a 'Property Editor' dialog box with a 'close' button in the top right corner. The main content area is titled 'Advanced Options' and contains the following sections:

- Advanced Options**
 - Edit Radio > Advanced Options
 - Dependency**
 - Field ID to control available options based on Grouping: [Empty text box]
 - UI**
 - Read-only:
 - Display field as Label when read-only?:
 - Workflow**
 - Workflow Variable: [status]

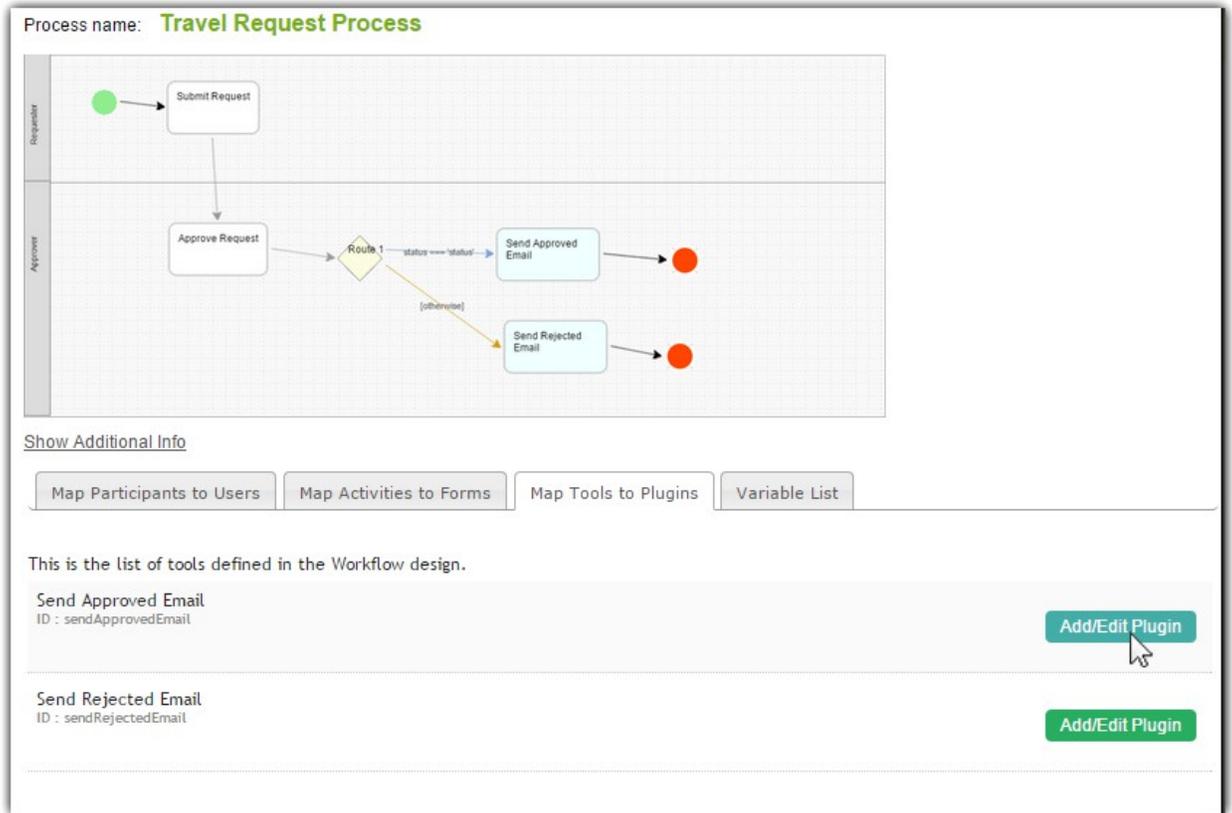
At the bottom of the dialog, there are navigation buttons: '< Prev' and 'Next >' on the left, and 'OK' and 'Cancel' on the right.

7. After all the configuration, the new approval form should look similar to the following screenshot:



4.6.4 Mapping Tools to Plugins

1. In the **Map Tools to Plugins** tab, you can map tools defined in the process to plugins.



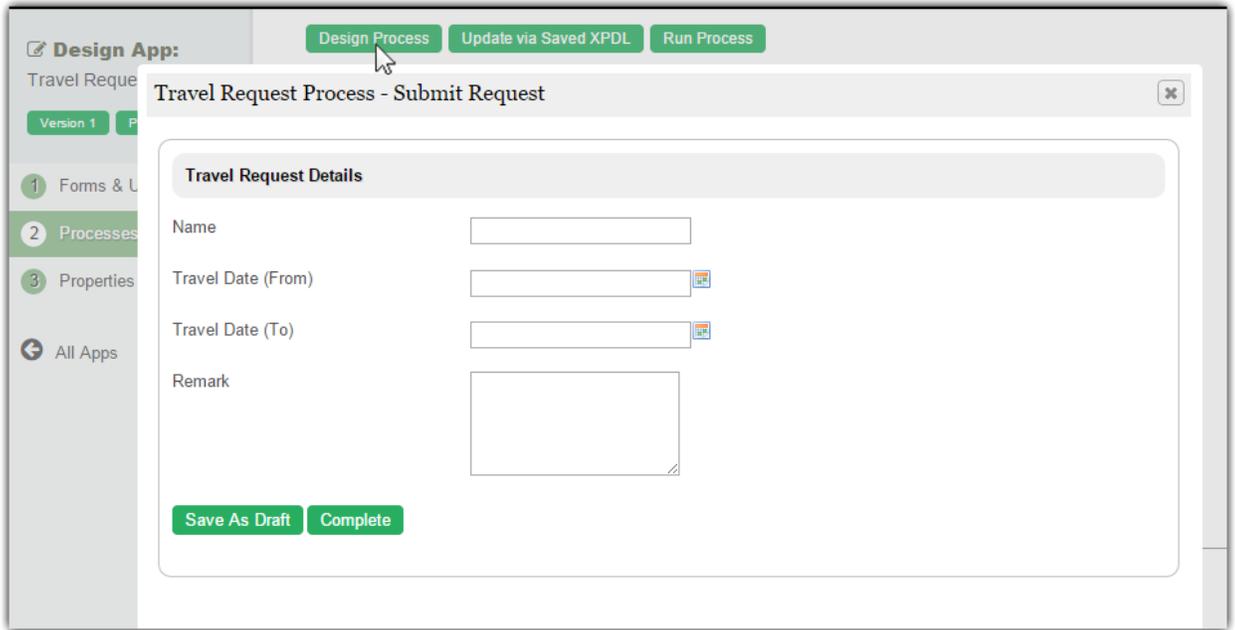
- For each tool, click on **Add/Edit Plugin** to select and configure a plugin.

Map Tools to Plugins - Send Approved Email (sendApprovedEmail)		
Plugin Name	Plugin Description	Plugin Version
Bean Shell Tool	Executes standard Java sy	3.0.0
Counter Increment Tool		3.0.0
Csv Import Tool		3.0.0
Database Update Tool	Executes SQL INSERT an	3.0.0
Email Tool	Sends email message to te	3.0.0
Export Form Email Tool	Export form to pdf and sen	3.0.0
Form Data Update Tool	Used to update form data i	3.0.0
Id Generator Tool		3.0.0
Json Tool	Reads a JSON feed URL,	3.0.0
Preset Form Data Tool	Create or fill form data in a	3.0.1

10 | Page 1 of 2 | Displaying 1 to 10 of 11 items

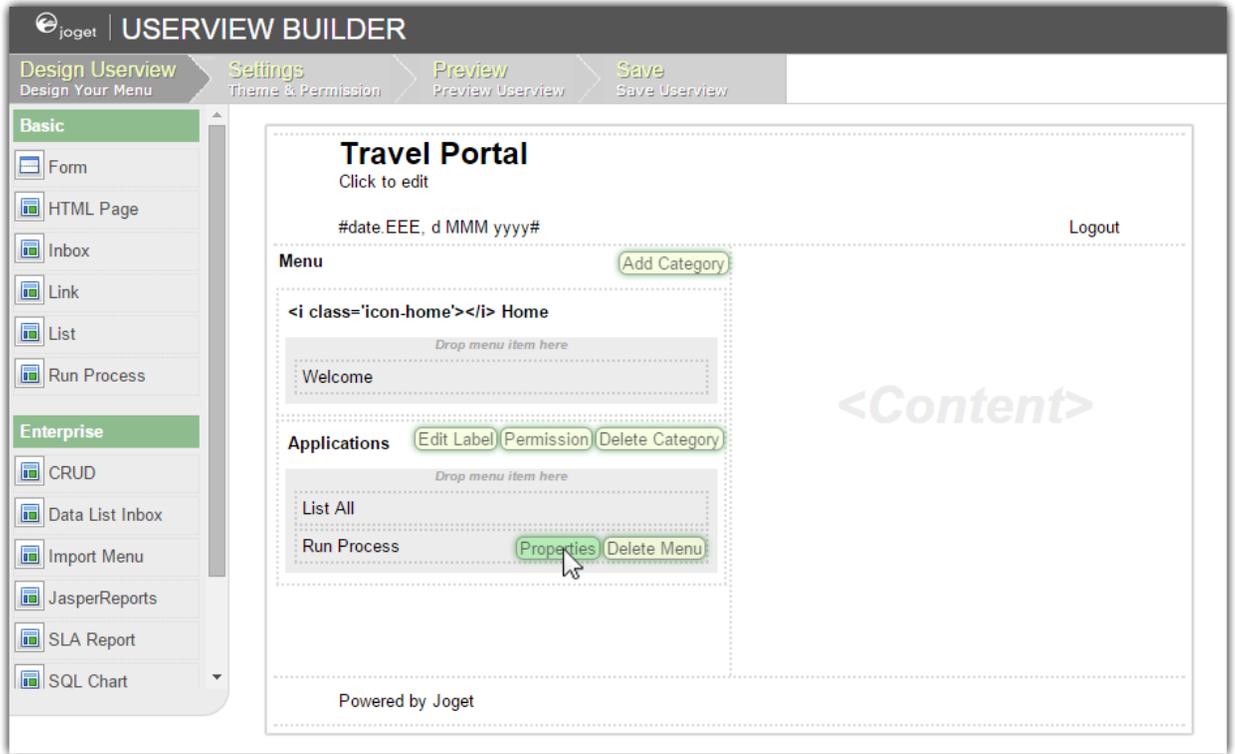
4.6.5 Test Driving the Process

1. To perform a test run on a process, click on the **Run Process** button along the top of the App design process page.

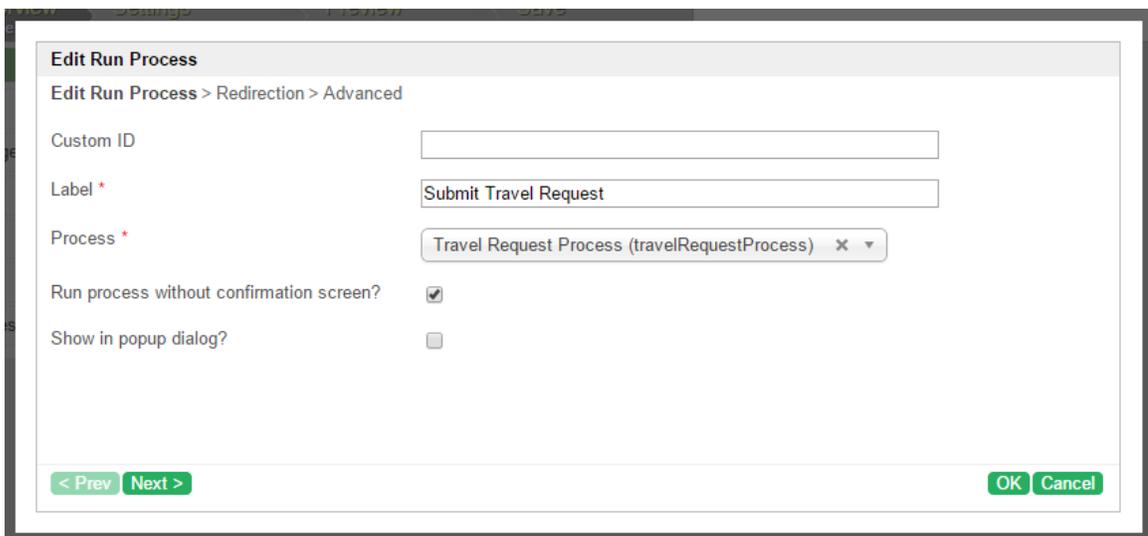


4.6.6 Incorporating the Process into the Userview

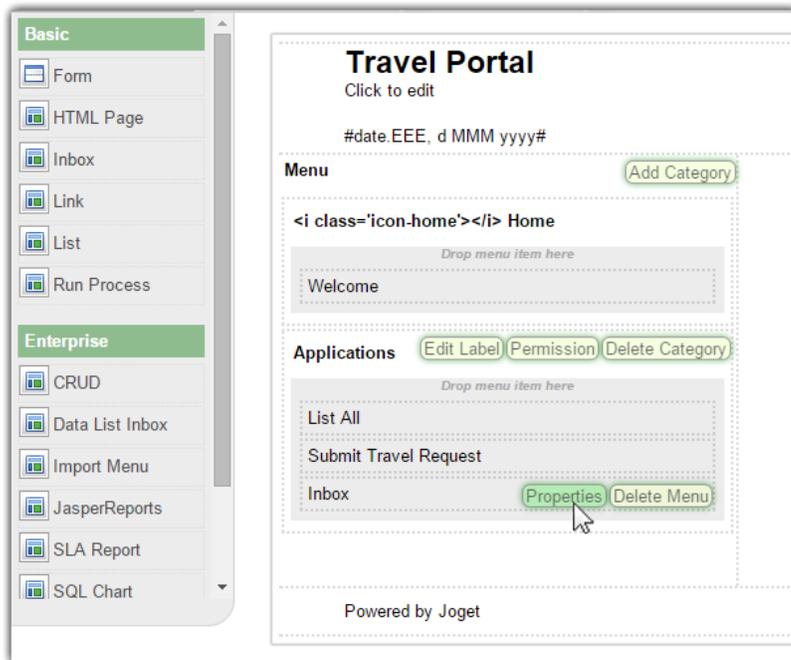
1. In the App design page, click on the name of an existing userview to launch the Userview Builder.
2. Drag a **Run Process** element into a menu category. This menu element allows the user to start a process from the userview.



3. Click on **Properties** of the Run Process element and select the process to run.



4. Drag an **Inbox** element into a menu category. This menu element provides the user with an inbox to manage their assigned workflow tasks.



5. Save the user view, and you will be able to run and perform assigned tasks in the published user view.

Home

Welcome

Applications

List All

Submit Travel Request

Inbox

Travel Request Process - Submit Request

Travel Request Details

Name

Travel Date (From)

Travel Date (To)

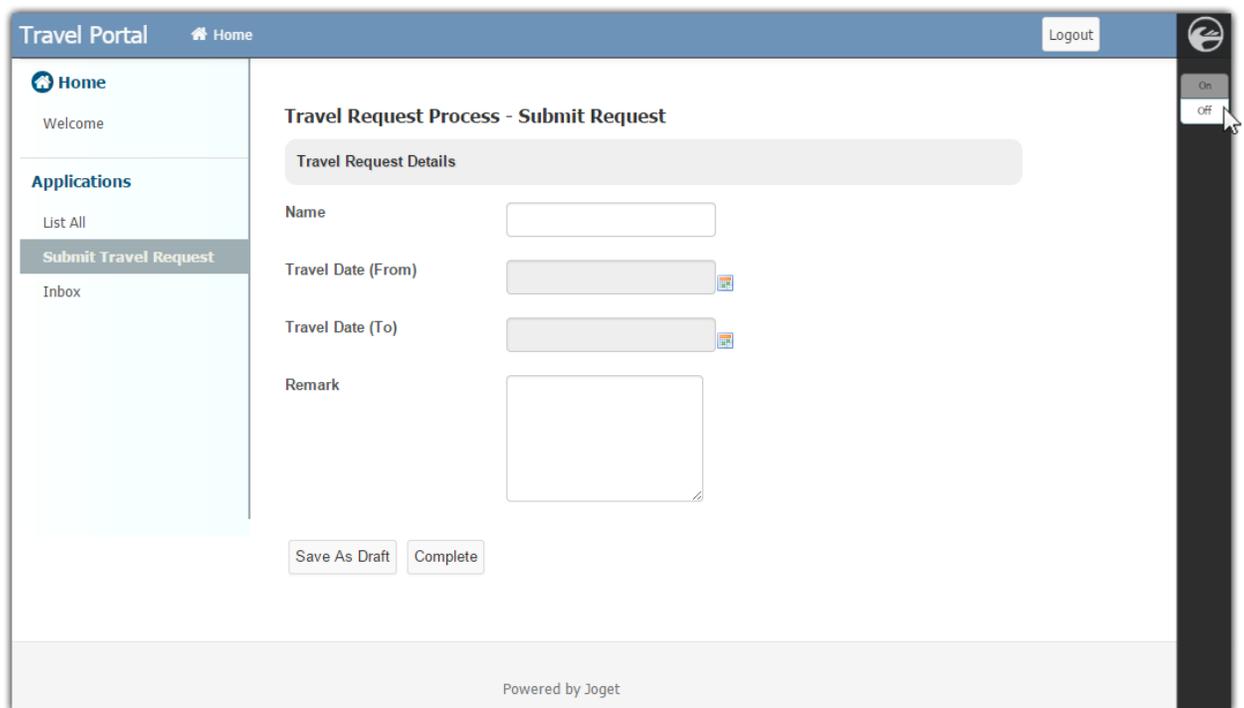
Remark

Save As Draft

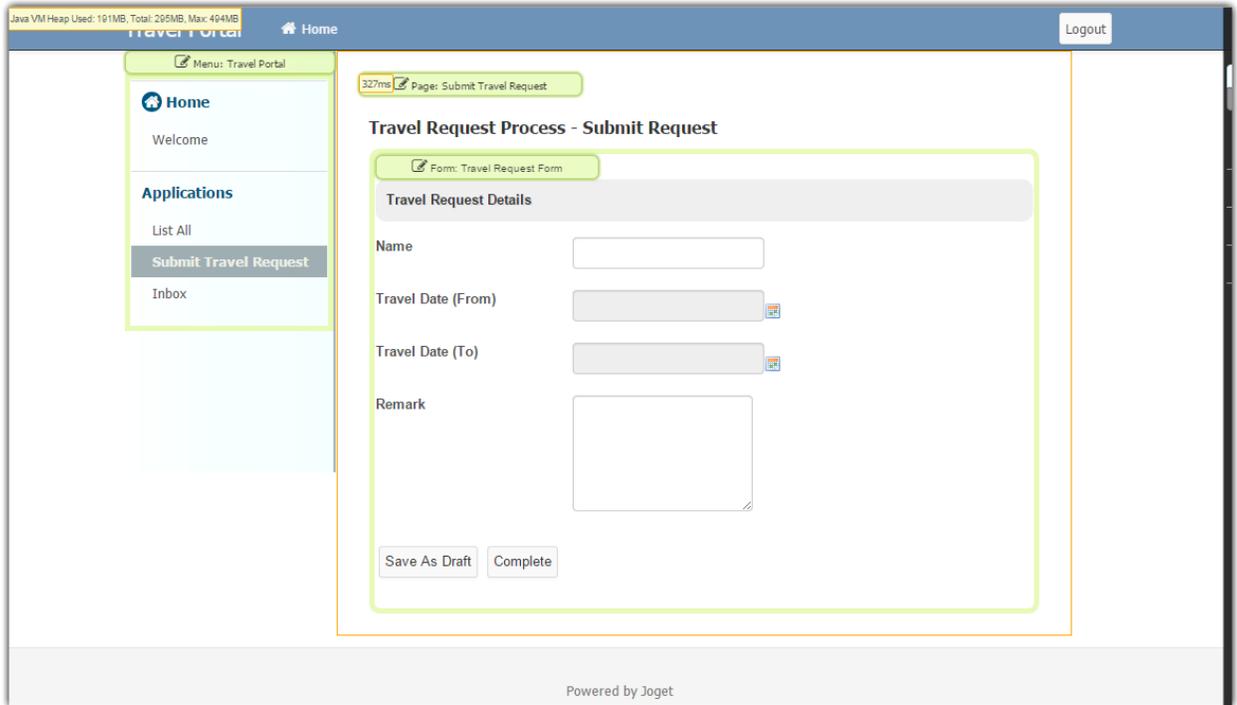
Complete

5. Managing Apps using the Quick Edit Mode

1. **Quick Edit Mode** is a new feature in v4 that allows administrators to identify forms, lists and menus directly from the front-end user view.
2. If you are logged in as an administrator, you will see a minimized **Admin Bar** on the right with buttons to toggle Quick Edit Mode **On** or **Off**.

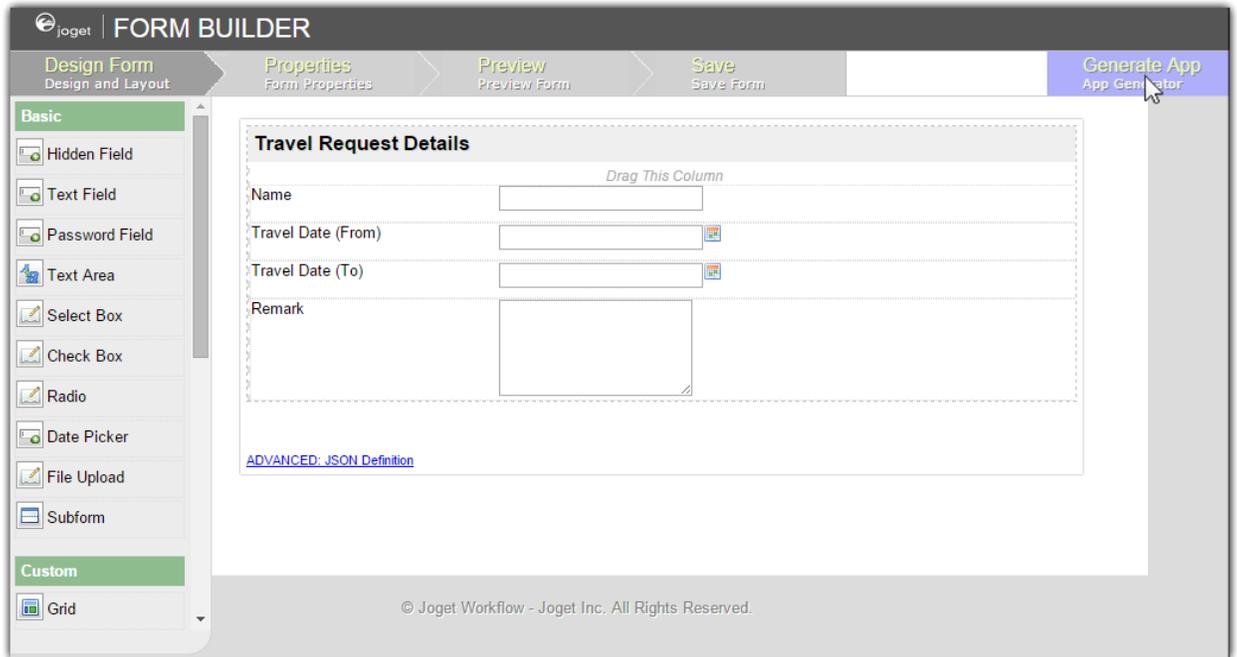


3. Once Quick Edit Mode is enabled, elements within the userview page are highlighted with green Quick Edit buttons. Clicking on the button will launch the respective Builder in a new window.

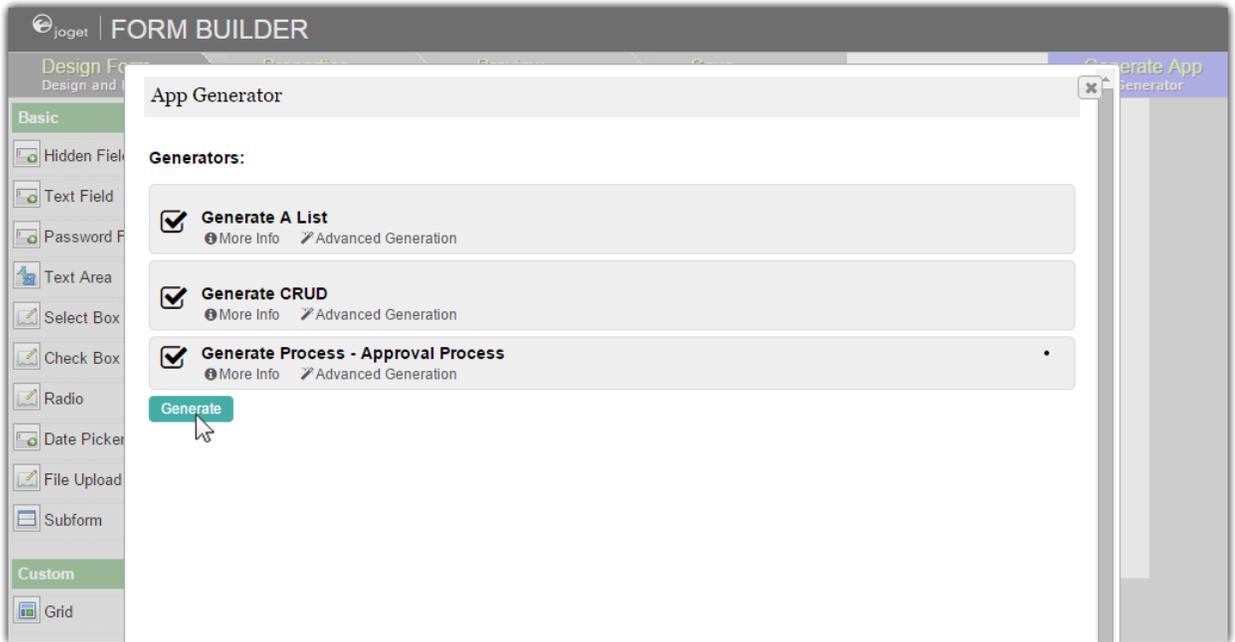


6. Generating Apps from a Form Using the App Generator

1. The **App Generator** is a new feature in v4 that greatly accelerates the building of an app. Using the App Generator, you can generate lists, CRUD (Create-Read-Update-Delete), a generic approval process and a Twitter Bootstrap themed userview directly from a form.
2. To use the App Generator, click on the large **Generate App** button on the top right of the Form Builder. Make sure that the form is saved first.



3. The App Generator dialog will offer options to Generate List, Generate CRUD and Generate Approval Process. Select each one and click on **Generate**. You may try to click on **Advanced Generation** to refine its options.



4. Once the generation is complete, reload the App design page and you will see a number of auto generated forms, lists, userviews and a process.

Design App:
Travel Request 2

Version 1 Not Published

- 1 Forms & UI
- 2 Processes
- 3 Properties & Export
- All Apps

Create New Form

Forms

- Travel Request Form travel_requests
- Travel Request Form Approval travel_requests
- Travel Request Form Approval Action travel_requests_approval
- Travel Request Form Clarification travel_requests

Create New Datalist

Lists

- List - Travel Request Form

Create New Userview

Userview

- Travel Request 2 **Launch**

Refresh

All Apps

Users

Monitor

Settings

Design App:
Travel Request 2

Version 1 Published

- 1 Forms & UI
- 2 Processes
- 3 Properties & Export
- All Apps

Design Process
Update via Saved XPDL
Run Process

Process name: **Travel Request Form Approval Process**

[Show Additional Info](#)

Map Participants to Users
Map Activities to Forms
Map Tools to Plugins
Variable List

This is the list of participants defined in the Workflow design.

Applicant ID : travelRequestForm_applicant		Add/Edit Mapping
Type	Performer	
Value	Activity Definition ID :runProcess	Remove Mapping
Approver ID : travelRequestForm_approver		Add/Edit Mapping
Type	Performer's HOD	
Value	Activity Definition ID :runProcess	Remove Mapping

5. The generated app is automatically published, and you will be able to launch the app from the App Center.

Travel Request 2
Home
Logout

Apps Made Simple

This app focuses on providing the simplest way for you to manage your data.

- Home
- Welcome
- Manage Travel Request Form
- Manage Travel Request Form (0)
- Approval Process
- Inbox (0)
- Submit Travel Request Form for Approval

Apps and Workflow Made Simple

Build apps, not just processes
Create full-fledged apps with support for data records management.

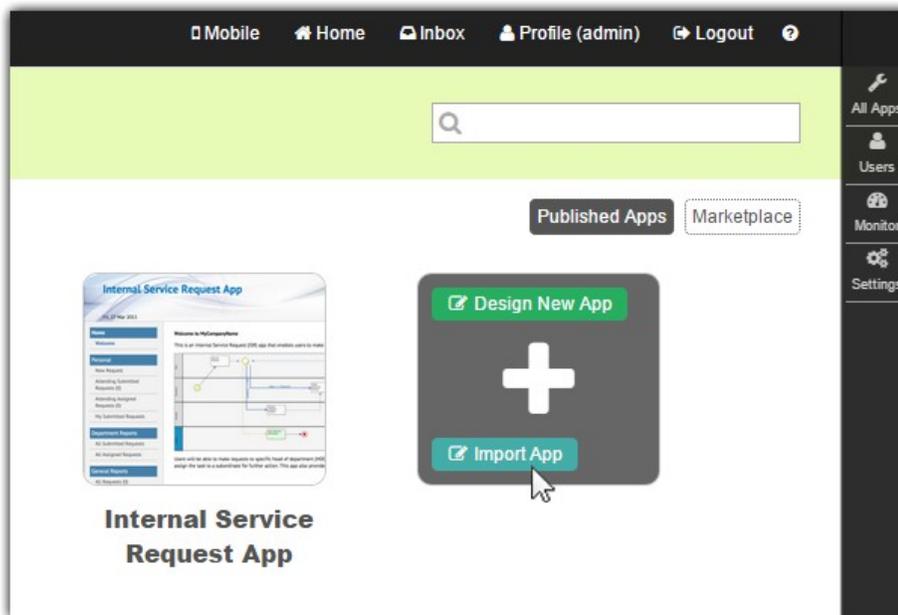
Increased Efficiency and Productivity
Faster and more consistent completion of manual processes, and with minimal errors.

Lowered Cost
Employees can be guided through complex procedures, hence reducing the cost of training.

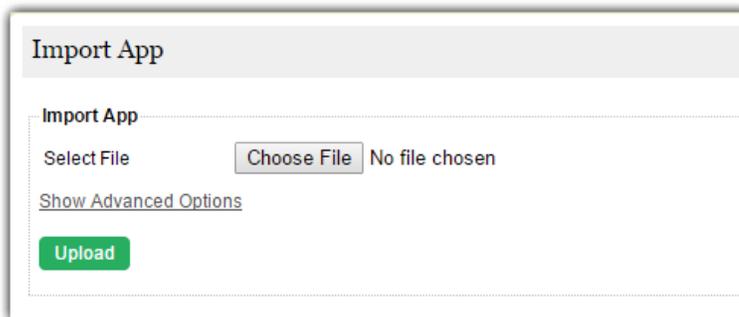
7. Importing and Exporting Apps

7.1 Importing an App

1. Joget apps are packaged files that contain form, datalist, userview and process definitions. Apps can be exported from another Joget installation, or downloaded from the **Joget Marketplace**.
2. To import an app, first login to the **App Center** as an administrator.
3. Click on **Import App** while hovering over the **Add New App** icon.

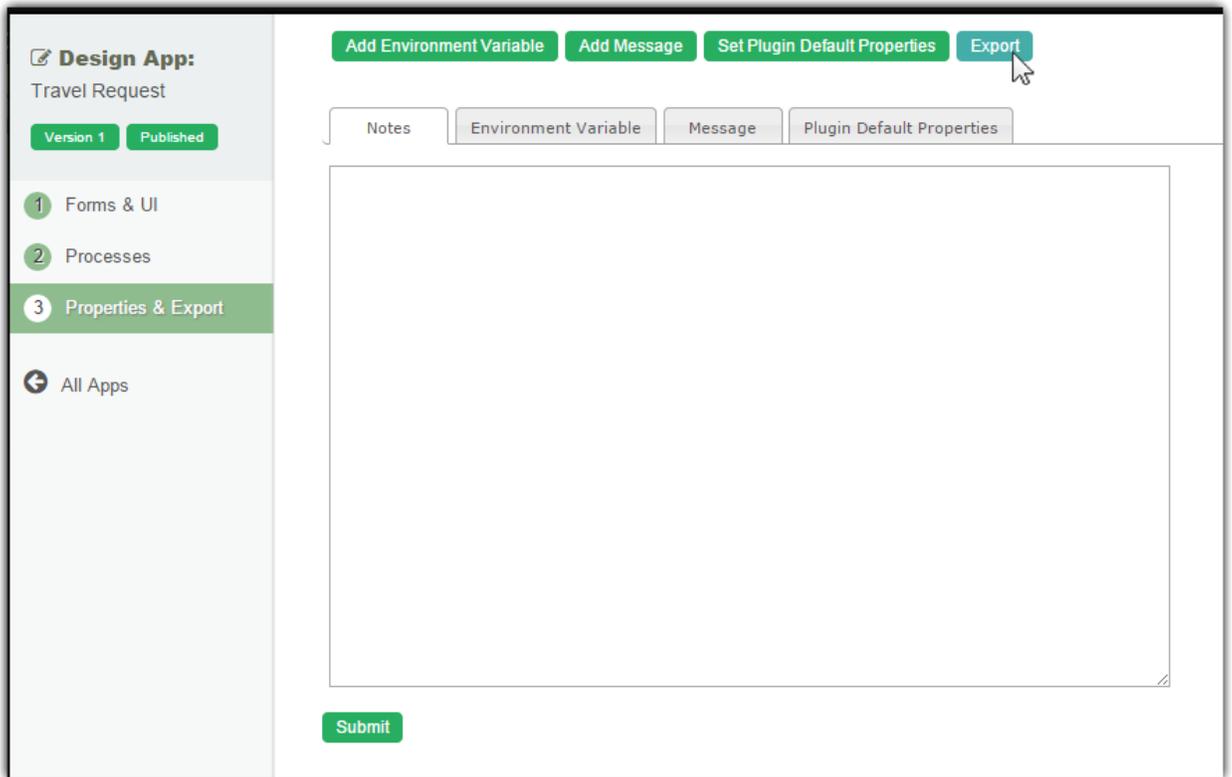


4. In the Import App dialog, select the app file, and click on **Upload**.



7.2 Exporting an App

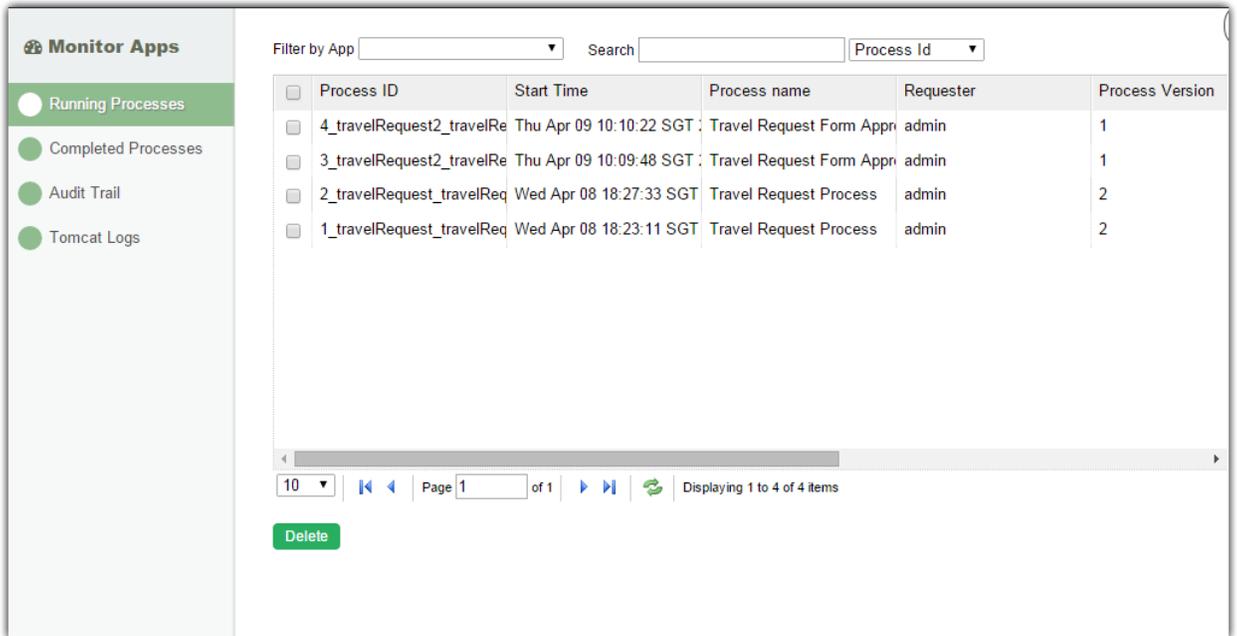
1. To export an app, first login to any user view in the current app as an administrator.
2. In the **Admin Bar** on the right, click on **App**, and select **Properties & Export** on the left.



3. Click on the **Export** button along the top, and the exported app will be downloaded as a ZIP file.

8. Monitoring Apps

1. For monitoring purposes, administrators are able to track state of all processes.
2. In the **Admin Bar** on the right, click on **Monitor**.
3. The **Running Processes** and **Completed Processes** menus on the left show a list of running and completed processes respectively.



The screenshot displays the 'Monitor Apps' interface. On the left, there is a sidebar with the following menu items: 'Running Processes' (selected), 'Completed Processes', 'Audit Trail', and 'Tomcat Logs'. The main area features a table with the following columns: Process ID, Start Time, Process name, Requester, and Process Version. The table contains four rows of data. Below the table, there is a pagination control showing 'Page 1 of 1' and 'Displaying 1 to 4 of 4 items'. A 'Delete' button is located at the bottom left of the table area.

Process ID	Start Time	Process name	Requester	Process Version
4_travelRequest2_travelRe	Thu Apr 09 10:10:22 SGT	Travel Request Form Appr	admin	1
3_travelRequest2_travelRe	Thu Apr 09 10:09:48 SGT	Travel Request Form Appr	admin	1
2_travelRequest_travelReq	Wed Apr 08 18:27:33 SGT	Travel Request Process	admin	2
1_travelRequest_travelReq	Wed Apr 08 18:23:11 SGT	Travel Request Process	admin	2

4. Clicking on a specific process brings up the details of the process, along with a list of all the past and current process activities.

The screenshot shows the 'Monitor Apps' interface. On the left, there is a sidebar with a 'Monitor Apps' header and four menu items: 'Running Processes' (selected), 'Completed Processes', 'Audit Trail', and 'Tomcat Logs'. The main area displays details for a process with the following attributes:

- Process ID: 4_travelRequest2_travelRequestForm_approver_process
- Process Definition ID: travelRequest2#1#travelRequestForm_approver_process
- Process Version: 1
- Process name: [Travel Request Form Approval Process](#)
- State: open.running
- Service Level Monitor: -
- Requester: admin
- Start Time: Thu Apr 09 10:10:22 SGT 2015
- Limit: -
- Due Date: -
- Delay: -
- Finish Time: -
- Time From Date Started: -

Below the details is an 'Activity List' table:

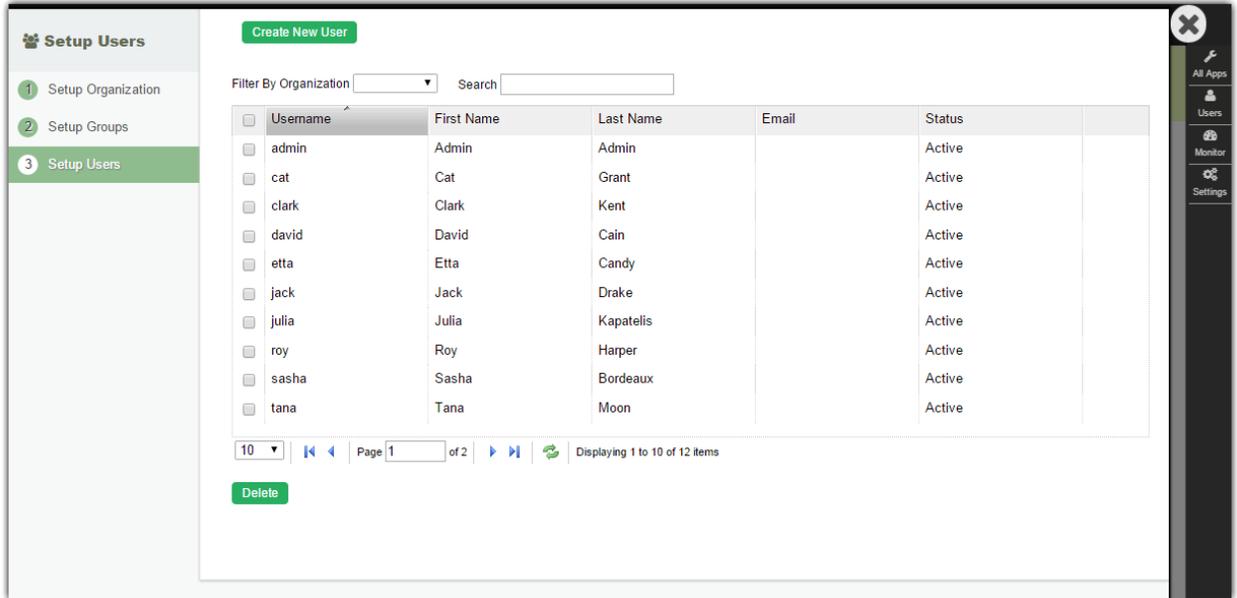
Activity ID	Activity Name	State	Service Level Monitor
5_4_travelRequest2_travel	Email on Received	closed.completed	-
6_4_travelRequest2_travel	Approval	open.not_running.not_start	-

At the bottom of the activity list, there is a pagination control showing 'Page 1 of 1' and 'Displaying 1 to 2 of 2 items'.

5. The **Audit Trail** menu on the left displays a list of audit trail information which includes user authentication.
6. The **Tomcat Logs** menu on the left provides a way for administrators to directly download the Tomcat log files for troubleshooting purposes.

9. Managing Users

1. Joget allows the setup of one or more **organizations** which contain **departments**, **grades**, and reporting structure. **Groups** are also available as an informal grouping or categories of users.
2. In the **Admin Bar** on the right, click on **Users**.
3. There are menu options on the left to **Setup Users**, **Setup Groups** and **Setup Organizations**.



- Integration to external directory systems such as LDAP or Active Directory are also available via plugins. This can be configured by selecting Directory Manager Settings after clicking on the **Settings** button of the Admin Bar.

10. Additional Resources

Joget Official Website

<http://www.joget.org>

Joget Knowledge Base
and Community Forums

<http://community.joget.org>

Joget Blog

<http://blog.joget.org>

Joget Marketplace

<http://marketplace.joget.org>

Joget Translation Site

<http://translate.joget.org>

Joget on Facebook

<http://www.facebook.com/jogetworkflow>

Joget on Twitter

<http://www.twitter.com/jogetworkflow>

Joget on YouTube

<http://www.youtube.com/jogetworkflow>