

Process Enhancement Plugin

New Feature

This plugin was designed specially for the Joget DX Enterprise and Professional editions.

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Introduction

In a nutshell, the Process Enhancement Plugin is a set of four plugins to automatically generate the approval and rejection buttons in the datalist and form screens.

This is a free plugin downloadable from [Joget Marketplace](#).

The Process Enhancement Plugin is made up of the following plugins:

1. Process form modifier (New form plugin to add action buttons to the form, such as "Approve" or "Reject", etc.).
2. Two process generators (Wizards to auto-generate the datalist, userview, process design and process mappings).
3. Process list (A new userview menu to display action buttons in the datalist, such as "Approve" or "Reject", etc.).
4. Datalist actions (internal to items 1 and 2 above).

Get Started

The easiest way to see how the Process Enhancement works is to create a new form and use the "App Generator > Generate Process - Approval Process" button in the form to automatically build the app. Here are the steps:

Steps	Screens (Click to view)
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1. **Download** the plugin from [Joget Marketplace](#) and import it into your Joget platform via [Manage Plugin](#) (See Figure 1).
2. Return to All Apps and click on the **Design New App**. Provide the app details and click on the **Save** button.
3. Click on the **Create new form** and add two fields:
 - a. A hidden field with id = 'status' and Workflow Variable field = 'status'
 - b. A textfield field with id = 'request'
4. Save your form.
5. Click on the green button called **App Generator** then click on the **Generate Process - Approval Process** (See Figure 2).
6. Close the form and return to the "Design App" page. You will notice that the **App Generator** has created the datalist and useview records for you.
7. Publish your app and click on the **Launch** button.
8. Your app is now ready for you.
9. In the app, click on the **Submit Request Form** menu. Fill in the "Request Note" and click on the **Submit** button (See Figure 3).
10. In the app, click on the **Approval** menu. You will immediately see something new, the datalist has "Approve, Reject, Clarify, Reassign" buttons below the list. These buttons were generated by the new Process List useview plugin (See Figure 4).
11. Now click on the **View** hyperlink in the Approval datalist.
12. The form will open and you will again see something new, the form has "Approve, Reject, Clarify, Reassign, Save As Draft, Cancel" buttons. These buttons were generated by the new Process Form modifier plugin (See Figure 5).
13. Go ahead to click the **Approve** button. You have completed the process flow.
14. In the app, click on the **My Closed Request Form** menu to see the completed record.
15. You can view the generated process flow in "Design App > Processes".
16. The app includes generated email notification in the "Processes > Map Tools To Plugin" which you can customize anytime.



Figure 1

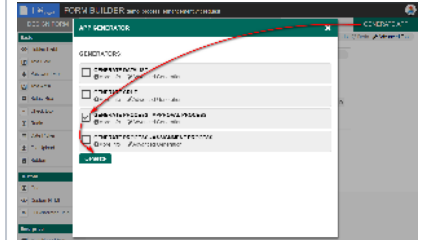


Figure 2

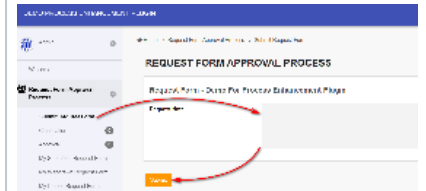


Figure 3



Figure 4



Figure 5

Process List Properties

Main Properties

Name	Description	Screens (Click to view)
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Custom ID	Item link slug. Optional field. Unique field The value defined here must be unique to the rest of the Userview Menus as the first matching name will be called upon.	
Label *	Menu label. Mandatory field.	
Process *	Map to process. Mandatory field.	
List *	Datalist to load. Mandatory field.	
Type *	Each process list menu is like a CRUD menu, but with enhanced features. You can tag the process list menu for various tasks and the plugin will automatically present the action buttons. There are five types of process list: <ul style="list-style-type: none"> • My Completed: Use this type to display completed tasks. My Completed belongs to the user who started the process. • My In Progress: Use this type to display submitted tasks. Joget will add the 'Reassign' and 'Withdraw' buttons in the datalist. • My Participated: Use this type to display completed tasks. My Participated allows other users to view and input comments in the task form. • My Withdrawn: Use this type to display withdrawn tasks. My withdrawn belongs to the user who started and then withdrawn the process. • Process Activity: Use this type to display tasks pending approval or clarification. Joget will add the 'Approve', 'Reject', 'Clarify' and 'Reassign' buttons in the datalist. 	

Figure 6:

Process Activity


Name	Description	Screens (Click to view)
Activity *	Select the process activity that you designed for this task.	
Assignment View Custom Header	Custom Header in HTML to show when editing an individual record in a form.	
Assignment View Custom Footer	Custom Footer in HTML to show when editing an individual record in a form.	

Figure 7:

My In Progress

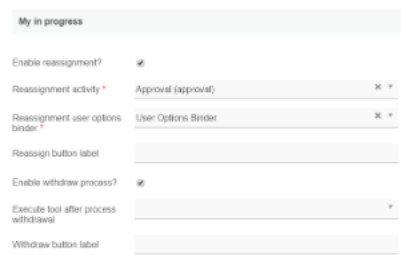
Name	Description	Screens (Click to view)
Enable reassignment?	Check to allow the approving user to reassign the task.	
Reassignment activity *	Select the process activity that you designed for task approval.	
Reassignment user options binder *	Select which binder to use to pop up the username to reassign.	
Reassign button label	Will default to 'Reassign' if left blank.	
Enable withdraw process?	Check to allow the request to withdraw the task.	
Execute tool after process withdrawal	Select the process activity that you designed for task withdrawal.	
Withdraw button label	Will default to 'Withdraw' if left blank.	

Figure 8:

Reassignment user options binder (User Options Binder)

Name	Description	Screens (Click to view)
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Select Organization	Refine the selections by selecting an organization.	Reassignment user options binder (User Options Binder) Configure User Options Binder Select Organization <input type="text"/> Select Department <input type="text"/> Select Group <input type="text"/> Add Empty Option <input type="checkbox"/> Empty Option Label <input type="text"/> Label <input type="text" value="Full Name with Username"/> Grouping by <input type="text" value="None"/> Use AJAX for cascade options? <input type="checkbox"/> Figure 9:
Select Department	Refine the selections by selecting a department.	
Select Group	Refine the selections by selecting a group.	
Add Empty Option	If checked, an empty option will be added to the selections.	
Empty Option Label	Empty option label. Only in use when Add Empty Option is checked.	
Label	<ul style="list-style-type: none"> • Full Name with Username • Username • Full Name 	
Grouping by	<ul style="list-style-type: none"> • None • Organization • Department • Grade 	
Use AJAX for cascade options?	When checked, this allows these fields to dynamically load available options based on the other field value (grouping column) when dealing with a tremendous amount of selections. Read more at Ajax Cascading Drop-Down List . Only available when used as an Options Binder. An array "values" is passed to the script automatically. See Bean Shell Programming Guide > Form Ajax Options Binder for example.	
Sync Cache Interval	Use this option to cache your selectbox if it has a large number of records. The value to activate cache synchronization (in seconds)	
Pause sync after idle	Pause sync if idle more than x seconds	

UI Form Properties

Name	Description	Screens (Click to view)
Form	Change this property to open another form	 Figure 10:
Created by field id *	Default to 'createdBy' to store the username	
Set all sections as readonly?	Check as readonly to prevent editing.	
Display readonly as label?	Check to show readonly fields as labels.	

Comments

Name	Description	Screens (Click to view)
Enable comments?	Check this and the plugin will display a new field for the user to input comments.	 Figure 11:
Show activity name?	Check to display the activity name in the comment trail.	
Number of latest comments show by default *	Defaults to 5 lines of comment trail per pagination.	
Disabled adding new comment?	Check to disable new comments.	

Process Status

Name	Description	Screens (Click to view)
Enable process status?	Check this to display the process status as a percentage. Clicking this icon will open up a workflow chart.	
Show Process Name?	Check this to display the process name.	

Show Future Process Activities?	Check this to display future process activities.	Process Status Enable process status? <input checked="" type="checkbox"/> Show Process Name? <input type="checkbox"/> Show Future Process Activities? <input type="checkbox"/> Show Skipped Activities? <input checked="" type="checkbox"/> Username Display Format: <input type="text" value="Name"/>
Show Skipped Activities?	Check this to show skipped activities.	
Username Display Format	Select the choice of username display in the process chart. The options are: <ul style="list-style-type: none"> • Username • Name • Name (Username) 	

Figure 12:

Data

Name	Description	Screens (Click to view)
Process data table *	This property defines the new database table name to use when creating a new child table to store the activity comments entered by the users. Defaults to 'appld_pd'. where 'appld' is the 'id' your new app. For example, if your appld is "myFavApp", the new table name in the database is "app_fd_myFavApp_pd".	<p>Figure 13:</p>
Update workflow variable & form data?	Check this to customize the workflow variable & form data (see the following fields).	
Workflow variable to store status *	Enter the workflow variable id to store the status value.	
Parent form field id to store status *	Enter the form field id to store the status value.	
Custom process status value & label	Enter the 'Custom value' and 'Custom label' for the reassignment and withdrawal actions. For example, in the 'withdrawal' action, to save into the status field the label of "Requester Withdrawn" and value of "Withdrawn", input this information into the 'Custom value' and 'Custom label' property fields respectively.	

UI

Name	Description	Screens (Click to view)
Back Button Label	You can change the back button label. The default is "Back".	<p>Figure 14:</p>
Save Button Label	You can change the save button label. The default is "Save".	
Custom Header	Custom Header in HTML to show when editing an individual record in a form.	
Custom Footer	Custom Footer in HTML to show when editing an individual record in a form.	

UI List Properties

Name	Description	Screens (Click to view)
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Show Number of Rows In Menu	Show Number of Rows In Menu.	
	<p>Performance Warning</p> <p>An additional query will be performed to return record count every time the Userview loads.</p>	
Button Position	<ul style="list-style-type: none"> • Top Left • Top Right • Bottom Left • Bottom Right • Top Left & Bottom Left • Top Right & Bottom Right 	
Selection Type	<ul style="list-style-type: none"> • Multiple • Single 	
Selector Position	<ul style="list-style-type: none"> • Left • Right • Both let & right • No 	
View form link label	Optional. Link to edit the form will default to 'View' but you can change the link name here.	
Custom Header	Custom Header in HTML to show above the listing.	
Custom Footer	Custom Footer in HTML to show below the listing.	

Figure 15:

Advance Properties

Name	Description
Userview Key Name	Define a column name to pre-filter the datalist against using the userview key value.

Performance & Offline Properties

Cache Settings

Name	Description ^{412px}	Screens (Click to view)
Scope	Caching options are: <ul style="list-style-type: none"> • None: no caching. • Application: Cache content by application where all users will see the same content. • User: Cache by username 	
Duration (s)	Duration in seconds to cache content, defaults to 20 seconds if applicable.	

Figure 16:

PWA Offline Settings

Note: PWA Offline support is dependent on the theme used.

Name	Description	Screens (Click to view)
Enable cache for offline support	Check this to enable caching for offline support, usually set for use on mobile browsers.	
Cache all datalist links in first page	Check this to enable caching for all datalist links, usually set for use on mobile browsers.	

Cache list actions (Non post action)	Check this to enable caching for datalist action buttons, usually set for use on mobile browsers.	<div style="background-color: #f0f0f0; padding: 5px; border: 1px solid #ccc;"> PWA Offline Settings <i>PWA Offline support is dependent on the theme used.</i> </div> <p>Enable cache for offline support <input type="checkbox"/></p> <p>Cache all datalist links in first page <input type="checkbox"/></p> <p>Cache list actions (Non post action) <input type="checkbox"/></p>
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Figure 17:

Map Activities to Forms - More Settings

If you use Process List plugin in your Userview, you can perform additional configuration of the menu in Map Activities to Forms > More Settings:

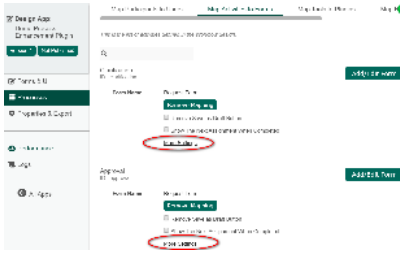
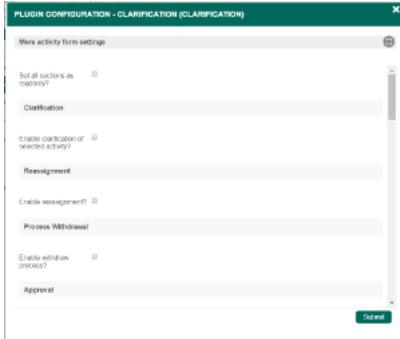
Name	Description	Screens (Click to view)
Execute Process Action in Background?	Click on the checkbox to set the assignment complete or run process to start in a separate thread. With this option enabled, the form will not wait until all the tools have been executed to return to the datalist.	
Readonly Set all sections as readonly?	Click on the checkbox to set all section fields as readonly.	
Clarification Enable clarification of selected activity?	Click on the checkbox to configure the following: <ul style="list-style-type: none"> • Clarification Activity • Clarify Button Label • Skip Validation? • Execute Tool After Return to Clarification Activity • Tooltip Message • Confirmation Message 	
Reassignment Enable reassignment?	Click on the checkbox to configure reassignment: <ul style="list-style-type: none"> • Reassignment activity • Reassignment user options binder • Reassign button label • Skip Validation? • Execute tool after reassignment • Reassignment Update Assignee Field • Tooltip message 	
Process Withdrawal Enable withdraw process?	Click on the checkbox to configure the withdraw process: <ul style="list-style-type: none"> • Execute tool after process withdrawal • Withdraw button label • Tooltip message • Confirmation message 	
Approval Replace complete button with approve & reject button?	Click on the checkbox to configure the approval process: <ul style="list-style-type: none"> • Multi approval: for Disabled, All Assignee Approved & Any required number of assignee approved. • Approve button label. • Reject button label. • Tooltip message (Approve). • Confirmation message (Approve). • Tooltip message (Reject). • Confirmation message (Reject). 	

Figure 18: More Settings

Figure 19: Plugin Configuration

<p>Comments</p> <p>Enable comments?</p>	<p>Click the checkbox to configure comments:</p> <ul style="list-style-type: none"> • Comments display mode • Exclude comments from activities • Show Activity Name? • Status Column Width (Default: 50%) • Number of Latest Comments Show by Default • Disabled Adding New Comment? • Comment Field Type • Set Comment Field As Mandatory? • Enable Attachment Field?
<p>Process Status</p> <p>Enable process status?</p>	<p>Click the checkbox to configure the process status:</p> <ul style="list-style-type: none"> • Show Process Name? • Show Future Process Activities? • Show Skipped Activities? • Username Display Format
<p>Data</p> <p>Process data table</p>	<p>Define the process data table name or leave as default. Best not to remove the "[appld]" marker string.</p>
<p>Update workflow variable & form data?</p>	<p>Click the checkbox to configure the workflow variable & form data update:</p> <ul style="list-style-type: none"> • Workflow variable to store status: Key in the workflow variable id that will store the process status. • Update draft status to workflow variable & form data: Click the checkbox to update draft status to workflow variable & form data. • Parent form field id to store status: Key in the parent form field id to store status • Custom process status value & label. Set the custom value and label for: <ul style="list-style-type: none"> • Approved • Rejected • Clarification • Reassignment • Withdrawal • Completed • Draft

Download Demo App

- [APP_demo_process_enhancement_kb.jwa](#) (Updated on 11-Sep-2020)

The process enhancement plugin is already included in this app and will automatically be installed into your Joget DX when you import this app.

Change Logs

7.0.2

[FIXED] : Comment field becomes readonly when the form sections are set to readonly in plugin setting for Assignment Form Actions.

7.0.1

[ADDED] : Provide additional two property fields for admin to key in 1) comment section label 2) comment field label.

[FIXED] : Update version checking.

[FIXED] : Not able to populate email content in cloud for Approval/Assignment Process Generator.

[FIXED] : Participant Id in the email tool is wrong for Approval/Assignment Process Generator.

7.0.0

- [MODIFIED] : Support run process in background for Assignment Form Actions.
- [MODIFIED] : Support complete assignment in the background for Assignment Form Actions.
- [FIXED] : Resubmit option is missing in the configuration for the Process List Menu.