

Designing a Process



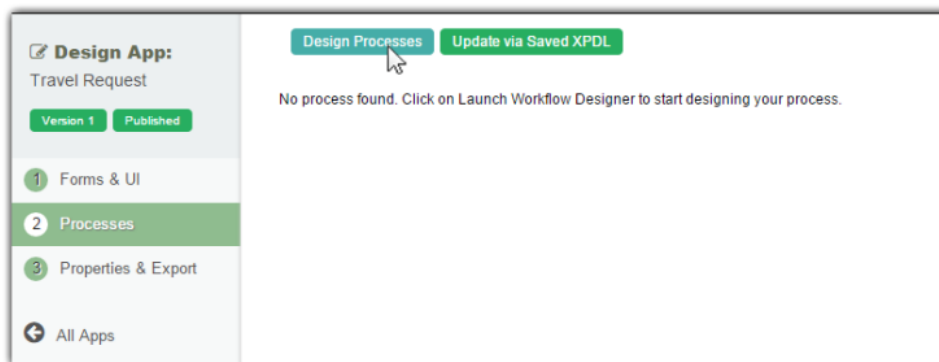
Previous step

Make sure that you have first completed the previous tutorial - [Designing a Userview](#)

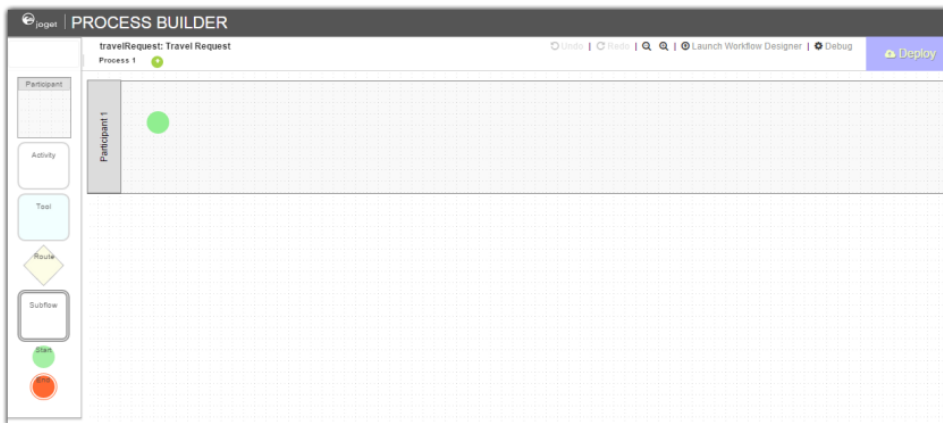
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Introducing the new Process Builder

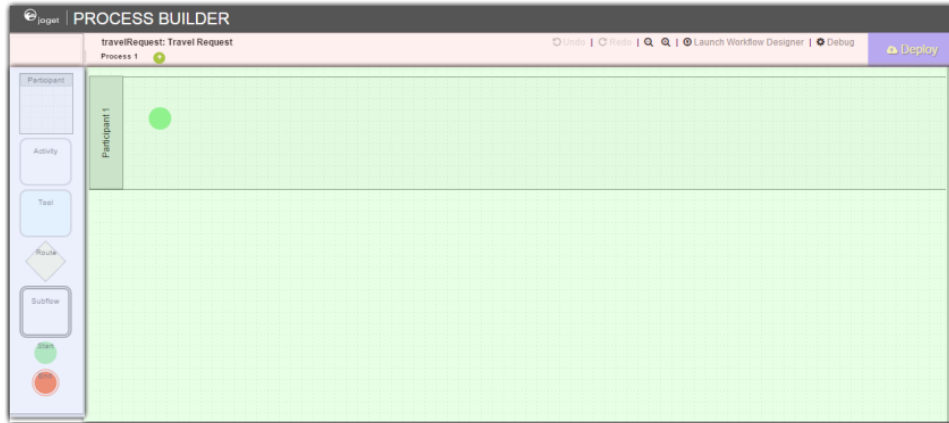
1. In the App design page, click on the **Processes** menu on the left, and then on the **Design Processes** button along the top.



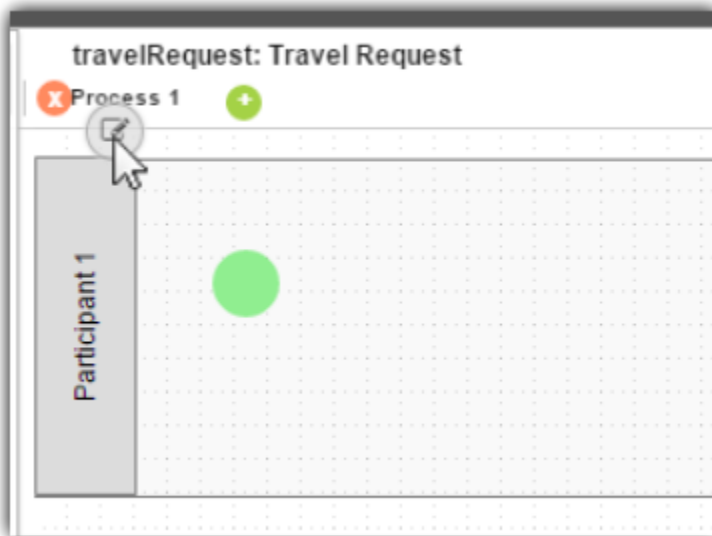
2. The **Process Builder** is one of the main highlights in Joget v5 replacing the older **Workflow Designer**.



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.



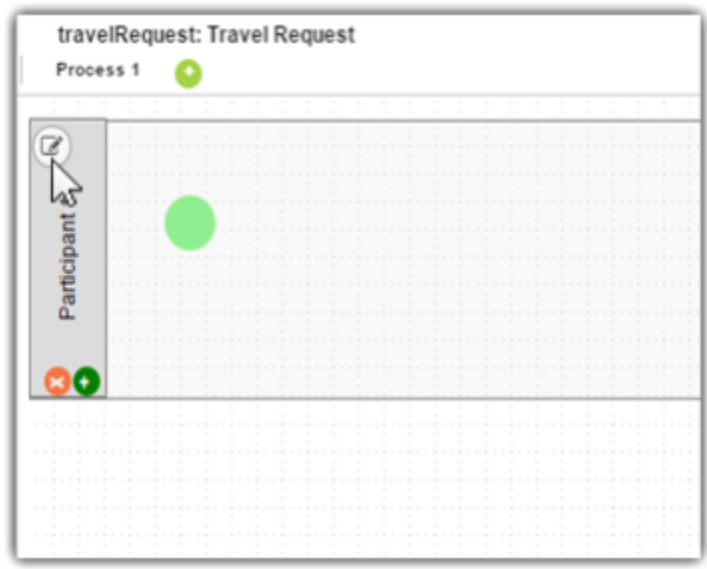
4. Click on the edit icon under the process name in the Navigator. This brings up the properties dialog where you can edit the process details.



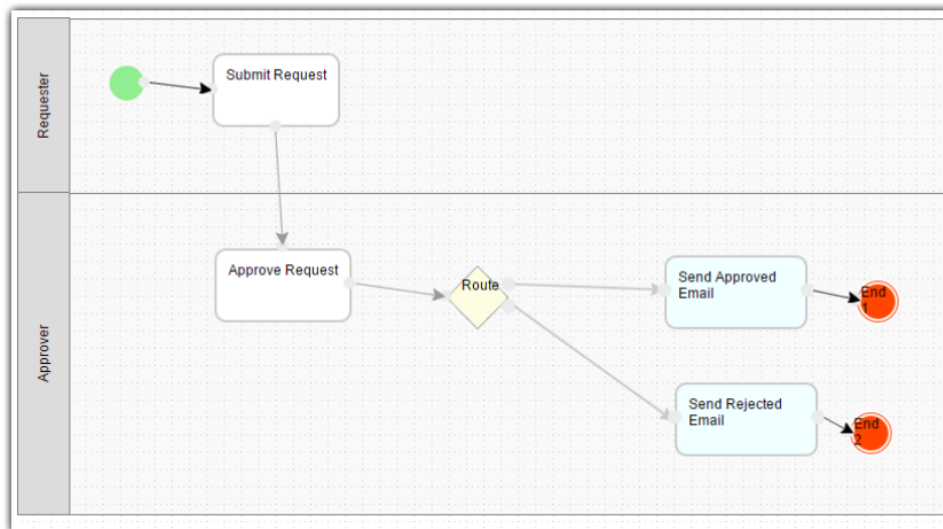
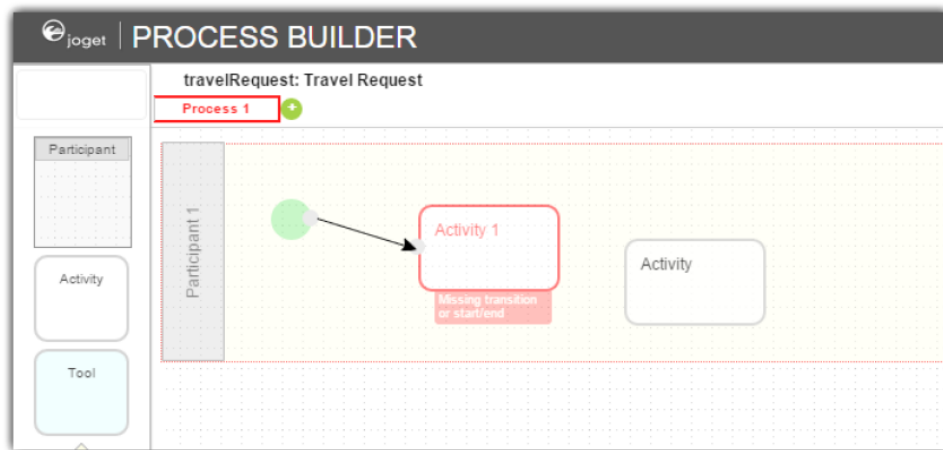
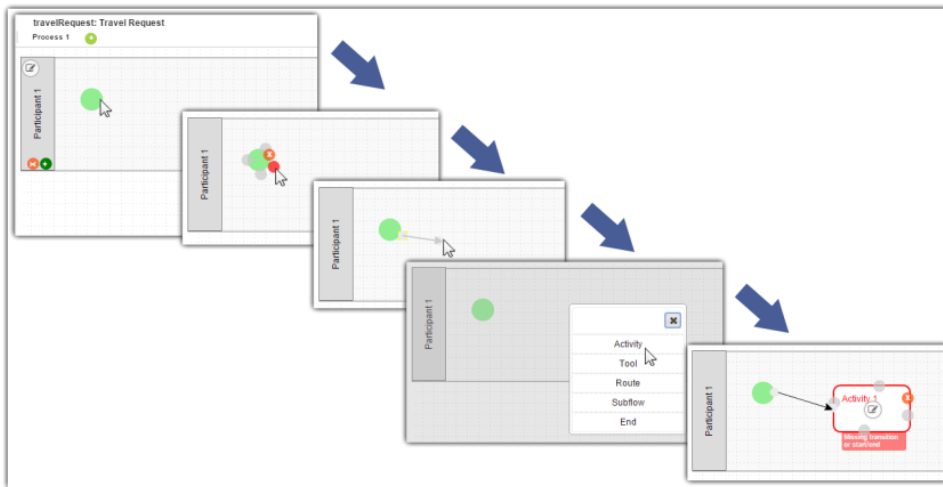
The 'Process Properties' dialog box is shown. It has a breadcrumb trail: 'Process Properties > Subflow Properties > SLA Options'. The 'ID' field contains 'process1'. The 'Name' field contains 'Process 1'. Under 'Workflow Variables', there is a table with one row: 'status'. To the right of the table are icons for adding, deleting, and refreshing variables. At the bottom are '< Prev', 'Next >', 'OK', and 'Cancel' buttons.

Variable ID
status

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.



7. 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**.



Routes

Learn more about [Process Routes](#).

Process Properties

Process Properties > Subflow Properties > SLA Options

ID *

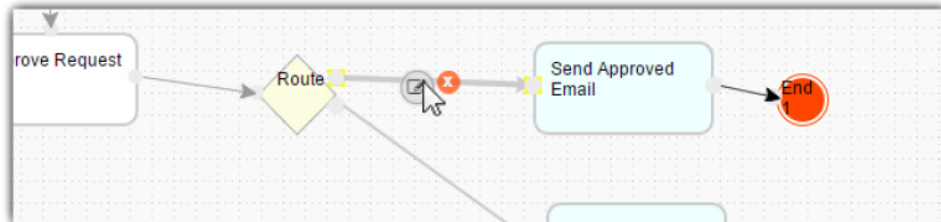
Name *

Workflow Variables

Variable ID
status

+ ↑ ↓ ✕

8. 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

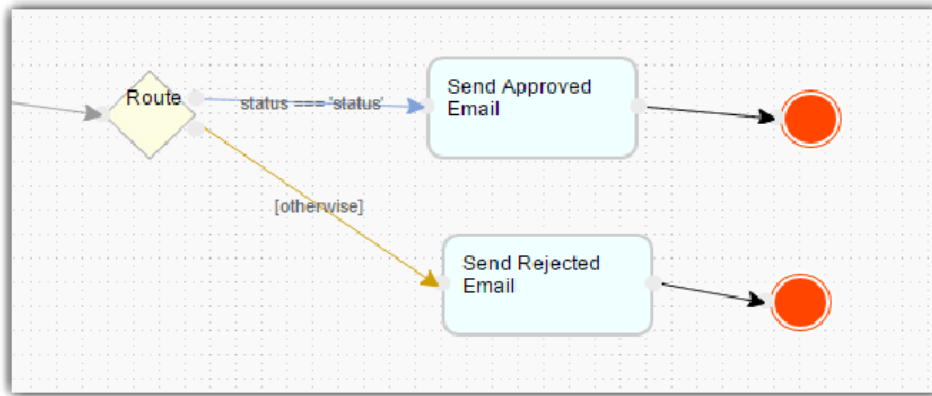
Conditions *

Join	Variable	Operation	Value
AND	status	Equal To	Approved

+ ↑ ↓ ✕

OK Cancel

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.

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.

2. 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.

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

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)

Map to a Form

External Form

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

10

Page 1 of 1

Displaying 1 to 1 of 1 items

Create New Form

- 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.

joget | FORM BUILDER

Design Form

Properties

Preview

Save

Basic

Custom

Hidden Field

Text Field

Password Field

Text Area

Select Box

Check Box

Radio

Date Picker

File Upload

Subform

Section

Subform

Property Editor

Edit Subform

Edit Subform > UI > Data & Binder

ID *

field1

Label

SubForm

Form *

Travel Request Form

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

Travel Approval

Travel Request Details

Name

Travel Date (From)

Travel Date (To)

Remark

Radio

Option

Property Editor

Edit Radio

Edit Radio > Advanced Options

ID *

approval

Label

Approval

Options (Hardcoded)

Value	Label	Grouping
Approved	Approved	
Rejected	Rejected	

Or Choose Options Binder

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 Property Editor dialog box is titled "Property Editor" with a "close" button in the top right corner. It contains a section titled "Advanced Options" with a breadcrumb "Edit Radio > Advanced Options". Below this, there are three main sections: "Dependency", "UI", and "Workflow". The "Dependency" section has a label "Field ID to control available options based on Grouping" followed by an empty text input field. The "UI" section contains two checkboxes: "Read-only" and "Display field as Label when read-only?". The "Workflow" section has a label "Workflow Variable" followed by a text input field containing the word "status". At the bottom left are "< Prev" and "Next >" buttons, and at the bottom right are "OK" and "Cancel" buttons.

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

The screenshot shows the Joget Form Builder interface. The top bar includes the Joget logo and the title "FORM BUILDER". Below this is a navigation bar with four tabs: "Design Form" (Design and Layout), "Properties" (Form Properties), "Preview" (Preview Form), and "Save" (Save Form). On the left is a sidebar with a tree view showing "Basic" and "Custom" categories. The "Basic" category is expanded, showing various form fields like Hidden Field, Text Field, Password Field, Text Area, Select Box, Check Box, Radio, Date Picker, File Upload, Subform, and Grid. The main workspace displays a form titled "Travel Approval". The form has a header "Travel Request Details" and a section "Approval" with two radio buttons: "Approved" and "Rejected". The form also includes a link "ADVANCED_JSON Definition" at the bottom. The footer of the interface reads "© Joget Workflow - Joget Inc. All Rights Reserved."

Mapping Tools to Plugins

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

Process name: **Travel Request Process**

Show Additional Info

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

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

Send Approved Email ID : sendApprovedEmail	Add/Edit Plugin
Send Rejected Email ID : sendRejectedEmail	Add/Edit Plugin

2. 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 s	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 t	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

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.

Design App: Travel Request

Version 1

1 Forms & U
2 Processes
3 Properties
All Apps

Travel Request Process - Submit Request

Travel Request Details

Name

Travel Date (From)

Travel Date (To)

Remark

Save As Draft **Complete**

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.

joget | USERVIEW BUILDER

Design Userview Design Your Menu
Settings Theme & Permission
Preview Preview Userview
Save Save Userview

Basic

- Form
- HTML Page
- Inbox
- Link
- List
- Run Process

Enterprise

- CRUD
- Data List Inbox
- Import Menu
- JasperReports
- SLA Report
- SQL Chart

Travel Portal
Click to edit

#date EEE, d MMM yyyy# Logout

Menu Add Category

<i class="icon-home"></i> Home

Welcome

Applications Edit Label Permission Delete Category

List All

Run Process Properties Delete Menu

Powered by Joget

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

Edit Run Process

Edit Run Process > Redirection > Advanced

Custom ID

Label *

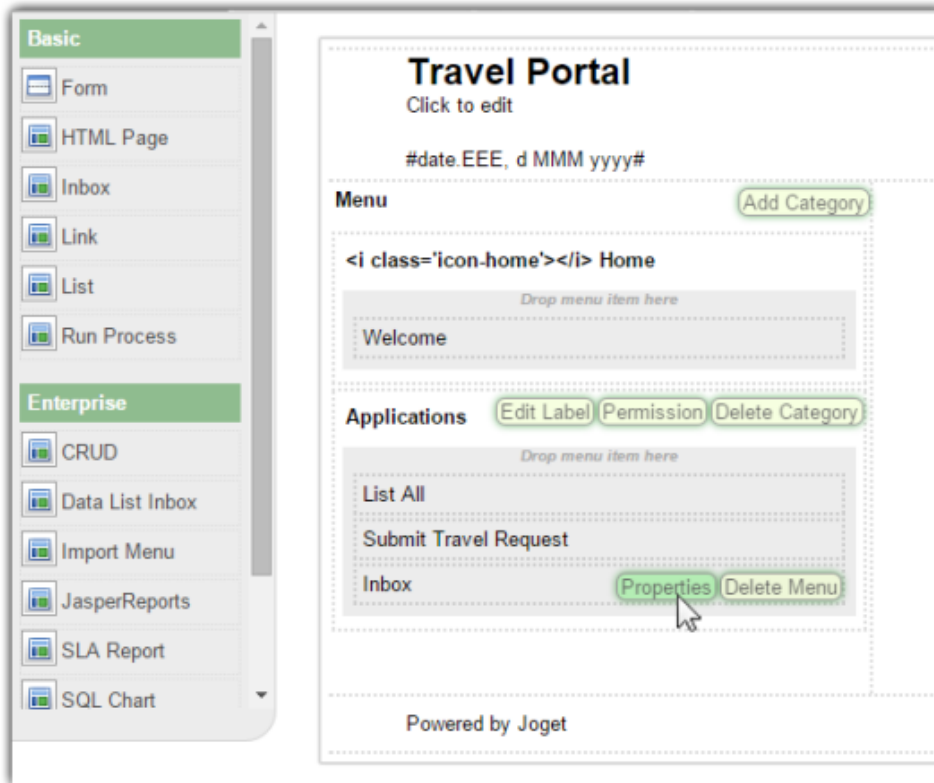
Process *

Run process without confirmation screen? ☒

Show in popup dialog? ☐

OK **Cancel**

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 userview, and you will be able to run and perform assigned tasks in the published userview.