Designing a Process

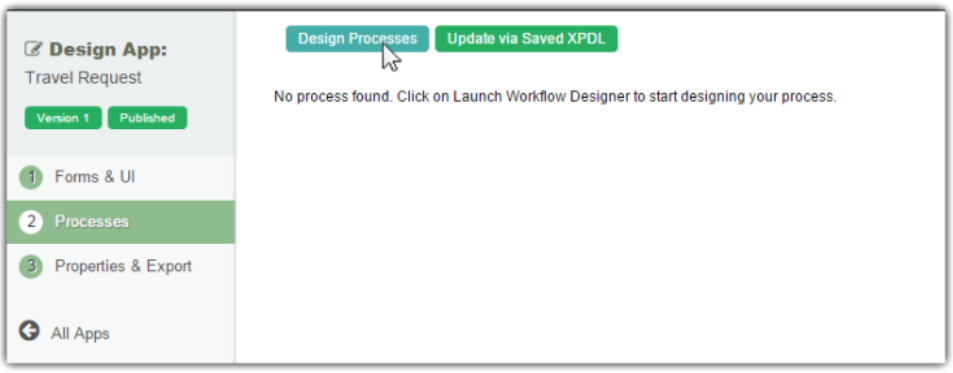
Previous step

Make sure that you have first completed the previous tutorial - Designing a Userview

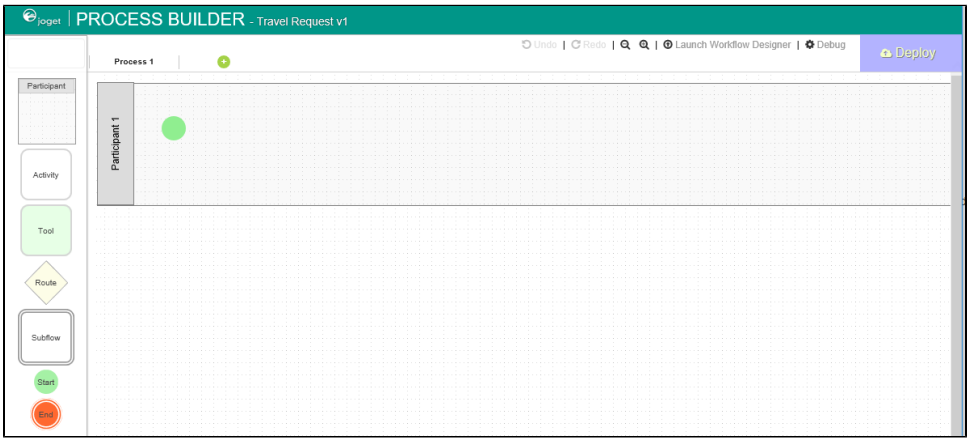
- Introducing the new Process Builder
- Mapping Participants to Users
- Mapping Activities to Forms
- Mapping Tools to Plugins
- Test Driving the Process
- Incorporating the Process into the Userview

Introducing the new Process Builder

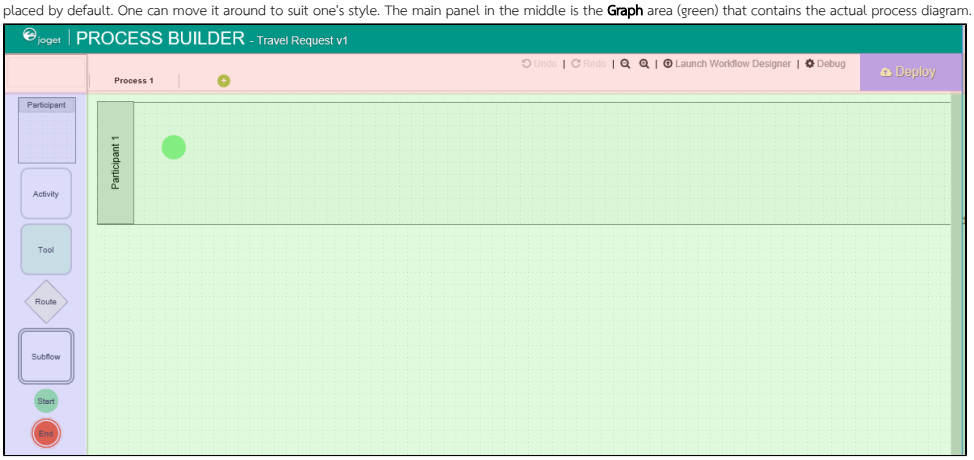
1. In the App design page, click on the **Processes** menu on the left, and then on the **Design Processes** button along the top.



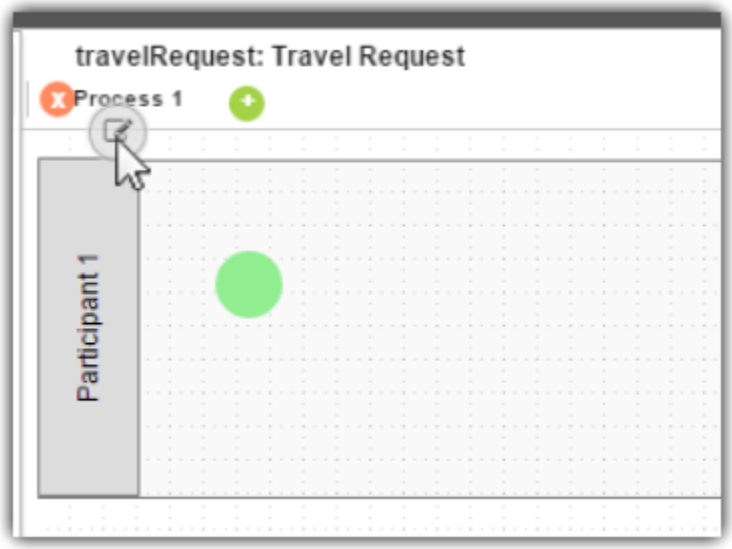
2. The **Process Builder** is one of the main highlights in Joget Workflow v5 replacing the older **Workflow Designer**.

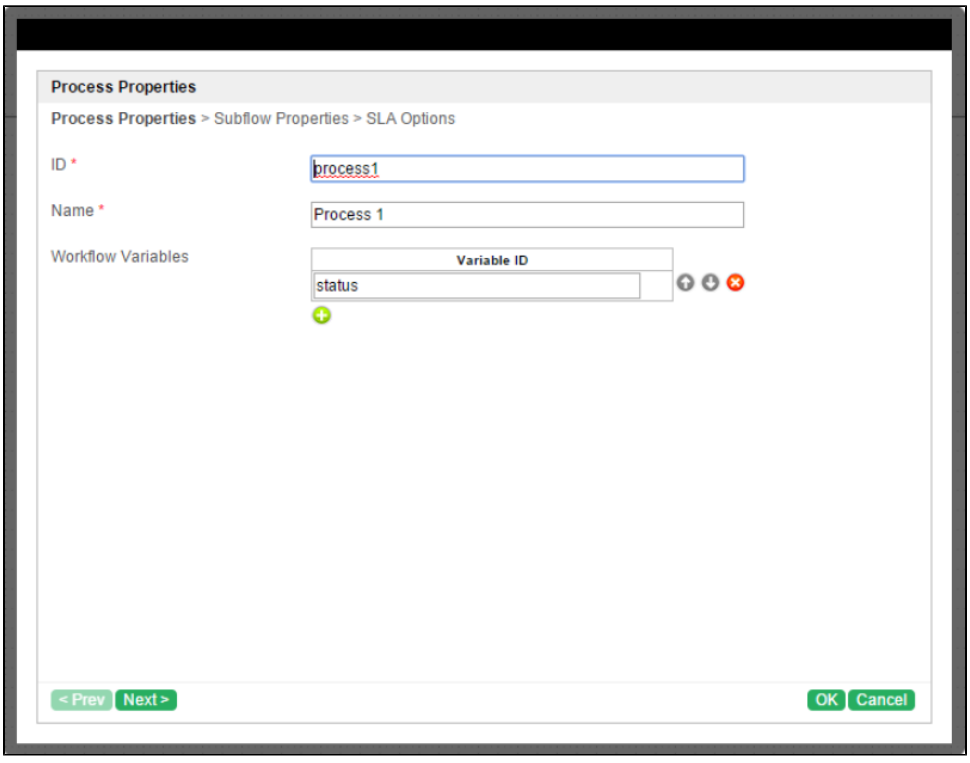


3. There are 3 main areas in the Process Builder. On the top (red), the **Navigator** panel contains a list of processes together with the action buttons on the right. On the left (blue), this is where the element palette is placed by default. One can move it around to suit one's style. The main panel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

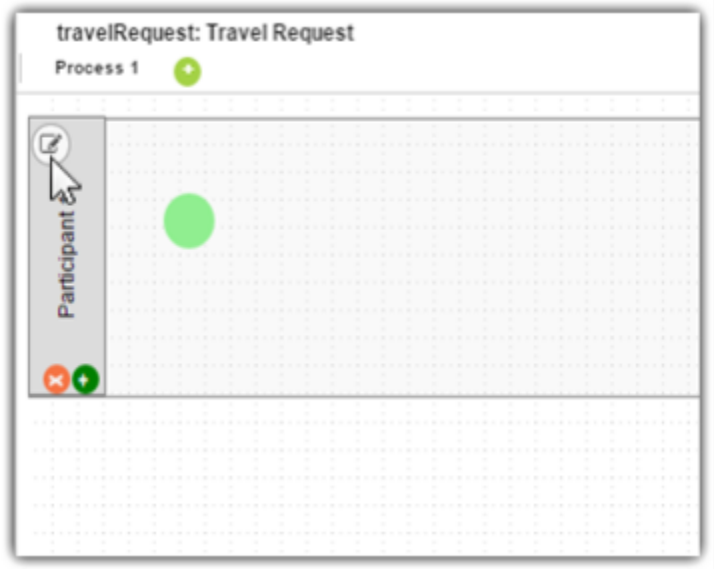


4. Click on the edit icon under the process name in the Navigator. This brings up the properties dialog where you can edit the process details.

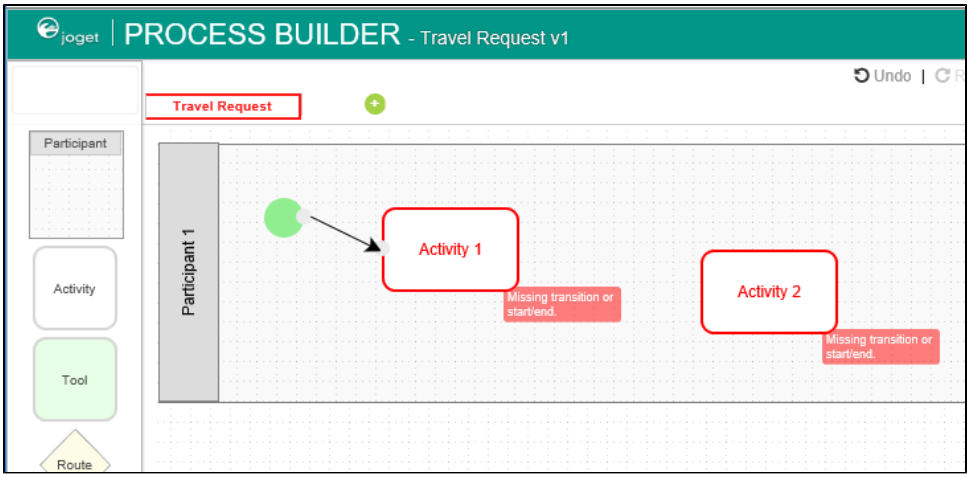


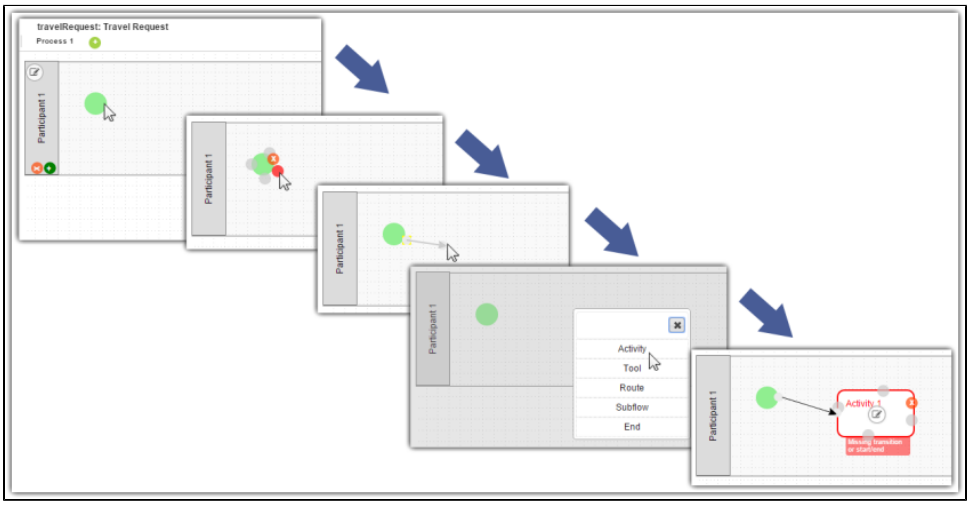


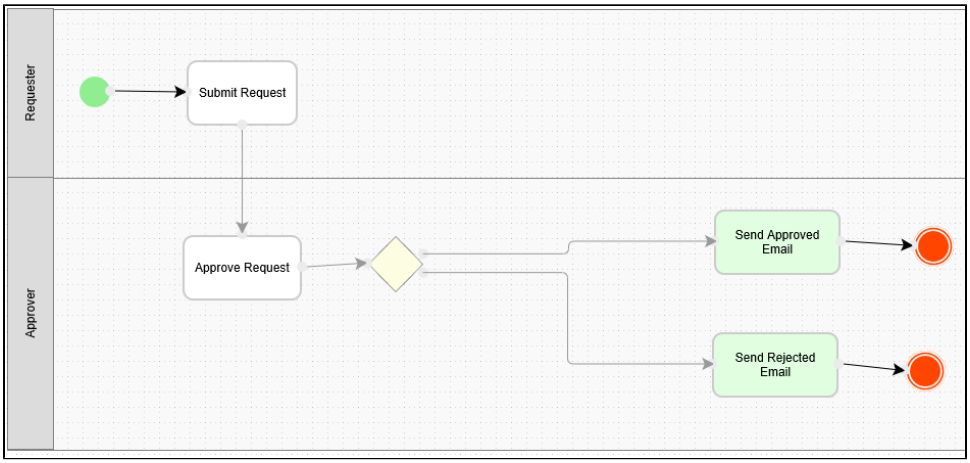
5. Add **Participants** into the process by clicking on the green add button under current Participant. Participants represent users or roles that perform a certain task. Click on the edit button while hovering over the participant name to set its properties.



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.

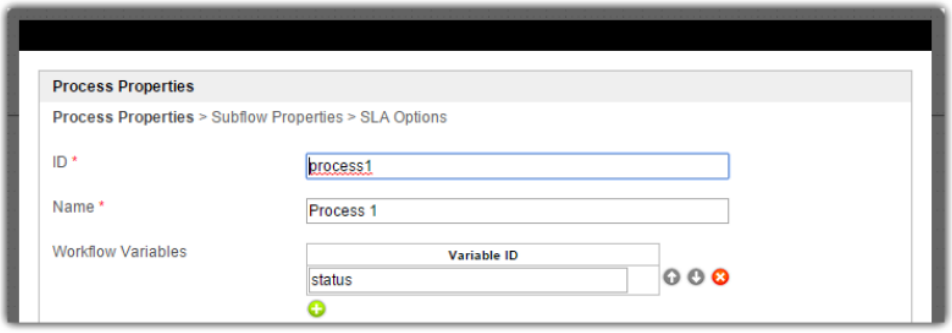




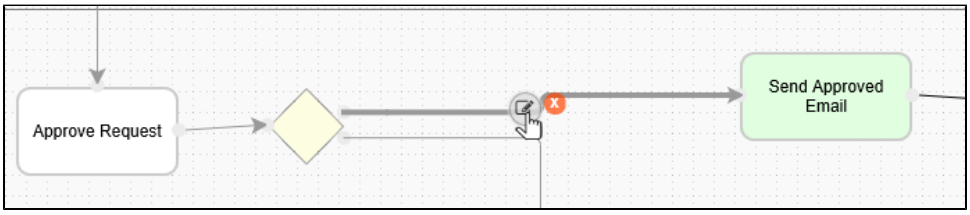


7. To handle routing (for example approval conditions), use **Routes** in combination with **workflow variables**. To create a workflow variable, double click on the process name in the Navigator to bring up the process dialog. Click on the first small icon under the Workflow variable heading, and key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

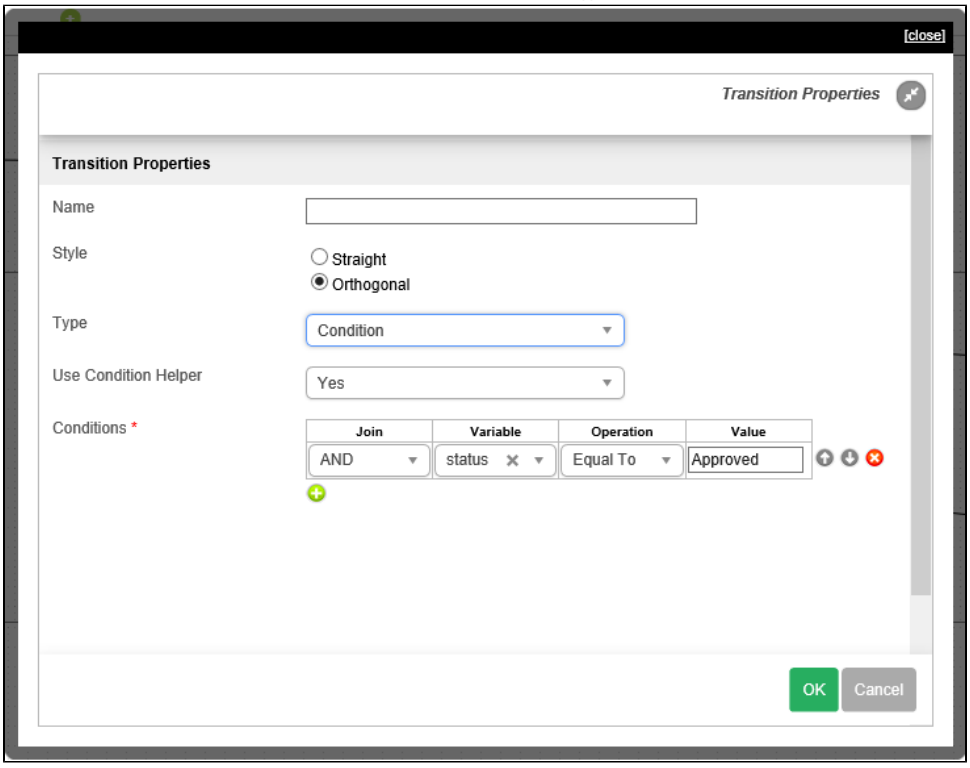
> **Routes**
>
> Learn more about Process Routes.



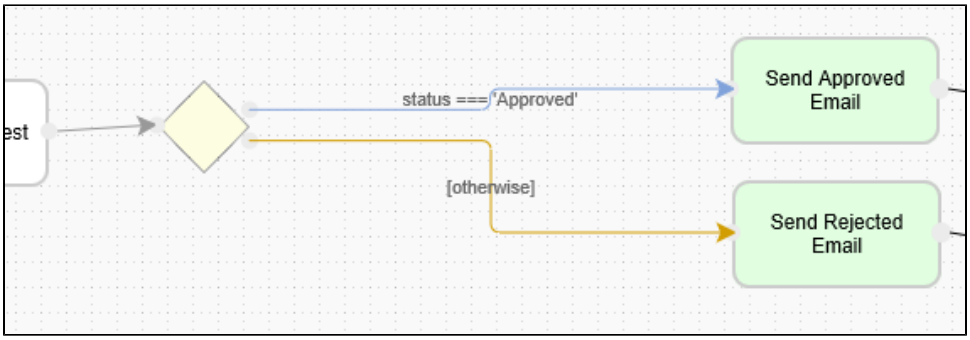
8. Once a workflow variable has been defined, **hover over** on a transition and **click** on the edit icon to open the transition dialog.

9. 

10. 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".



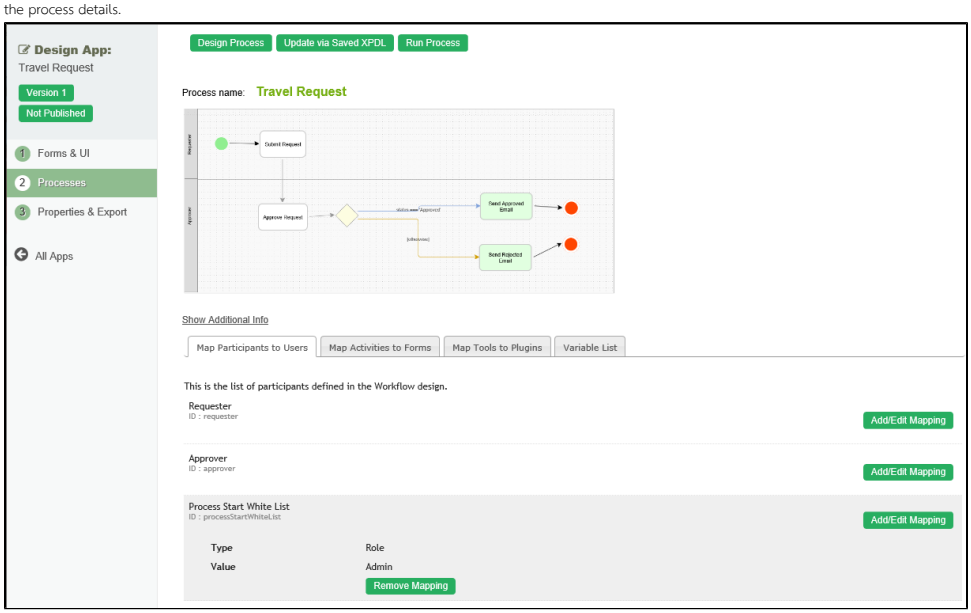
11. Set the transition type to **Otherwise** to indicate that it is the default path to take when other conditions are not met. The Otherwise transition is shown in orange. An example of a simple routing process is as shown below:



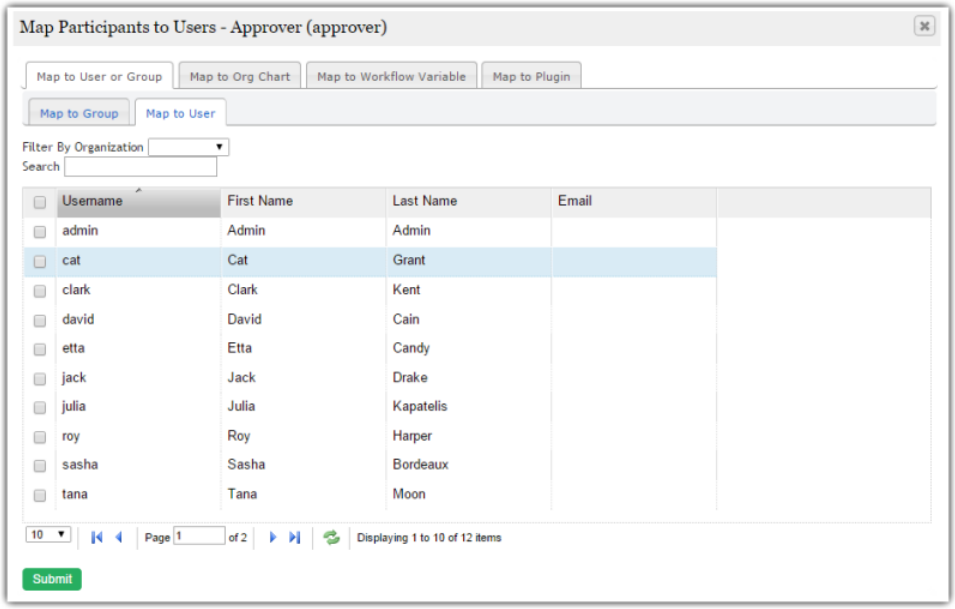
12. Ensure that the process has a proper **Start** and **End**. Click on **Deploy** to deploy the process to the server.

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 Workflow will interpret the process diagram and load the process details.



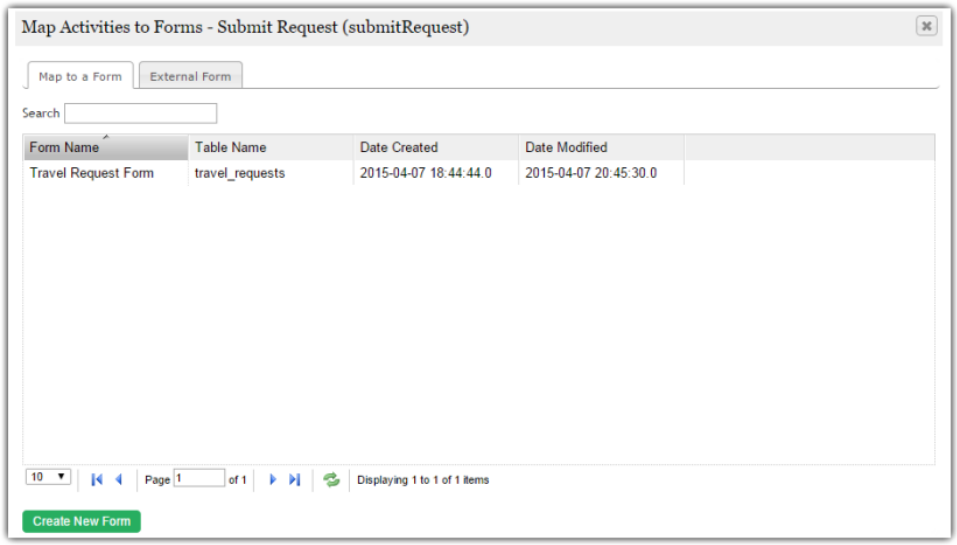
2. Participants defined in the process are listed in the **Map Participants to Users** tab, and you can map each participant to specific people. Click on **Add/Edit Mapping** to map to specific groups, users, organization chart, etc. If no mapping is done for a participant, any tasks are automatically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



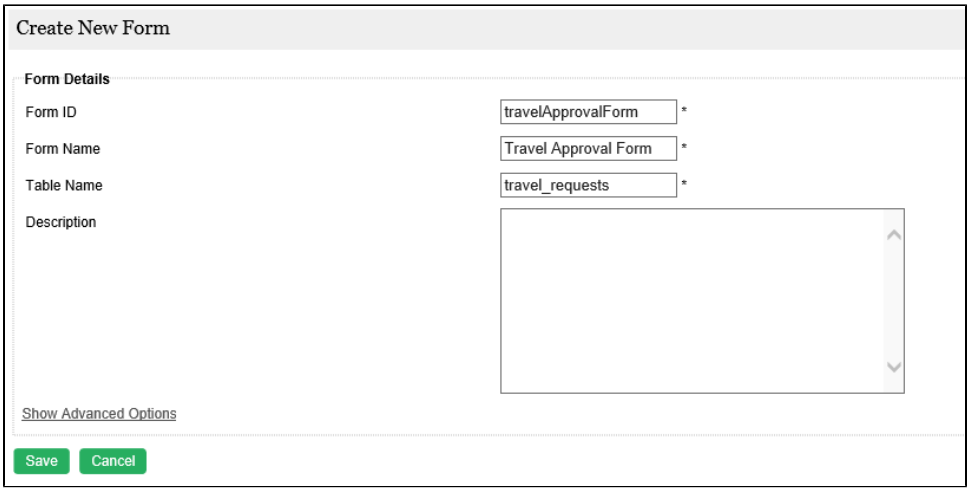
Mapping Activities to Forms

1. In the **Map Activities to Forms** tab, all process activities are listed.

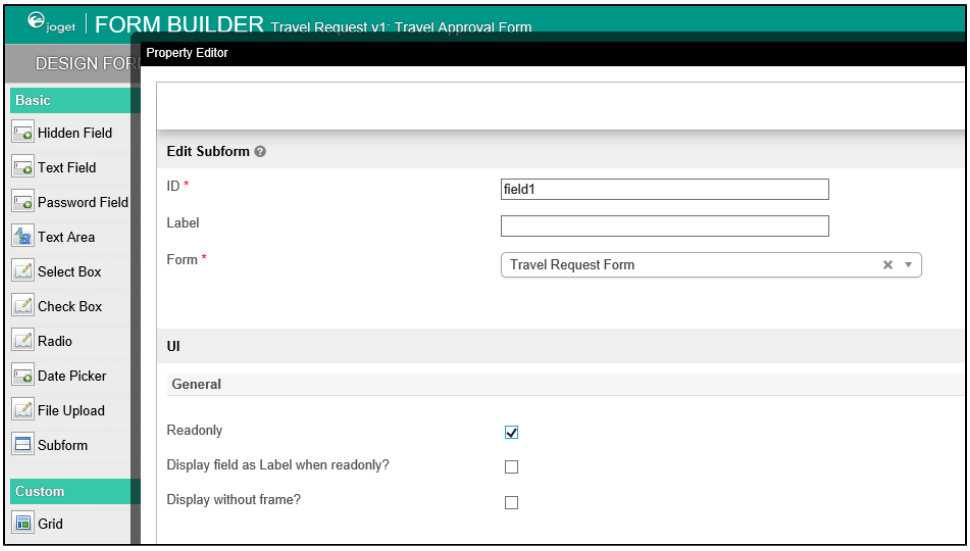
2. For each activity, click on **Add/Edit Form** to select from a list of current forms in the app.



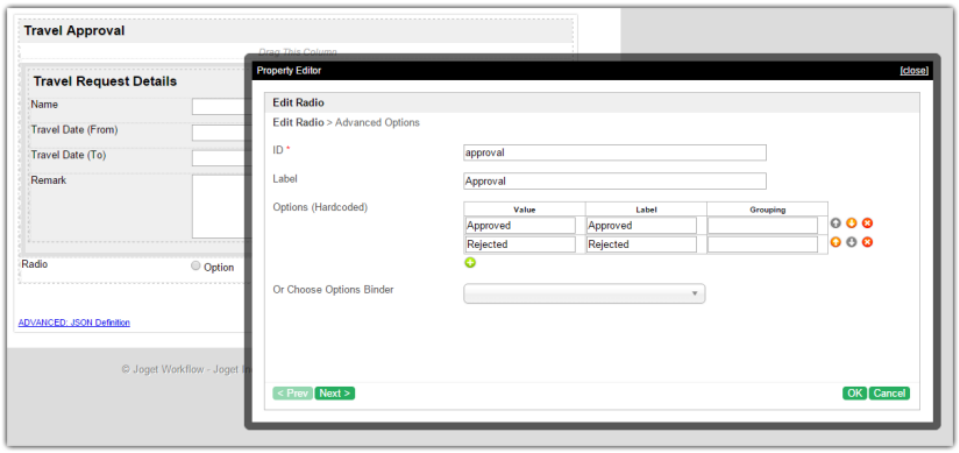
3. As an example to handle an approval process, click on **Create New Form** to create a new **Travel Approval Form**. In this new form, add a **Subform** that displays the original submitted form, and **radio** buttons to capture the approval status.



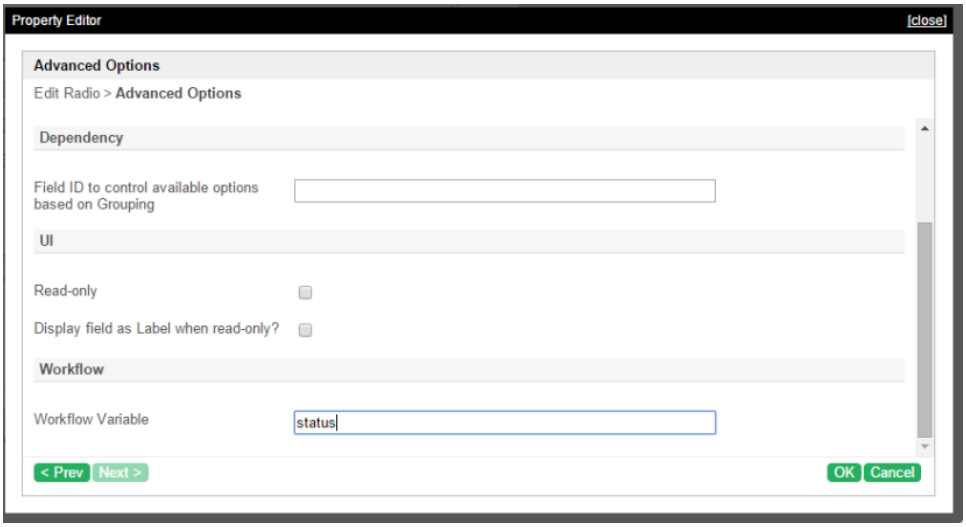
4. Configure this Subform to select the original request form.



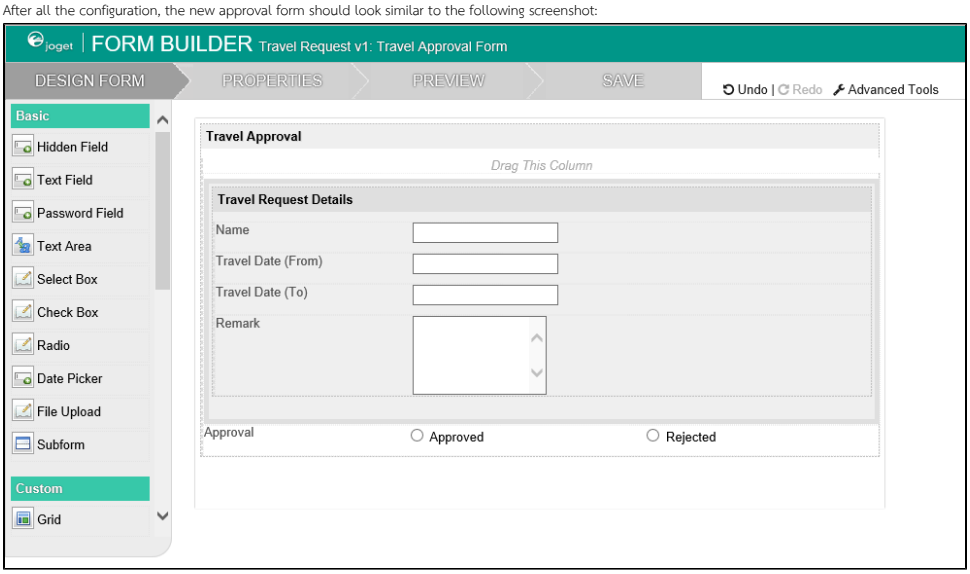
5. Configure the **status** radio button to have Approved and Rejected options.



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.

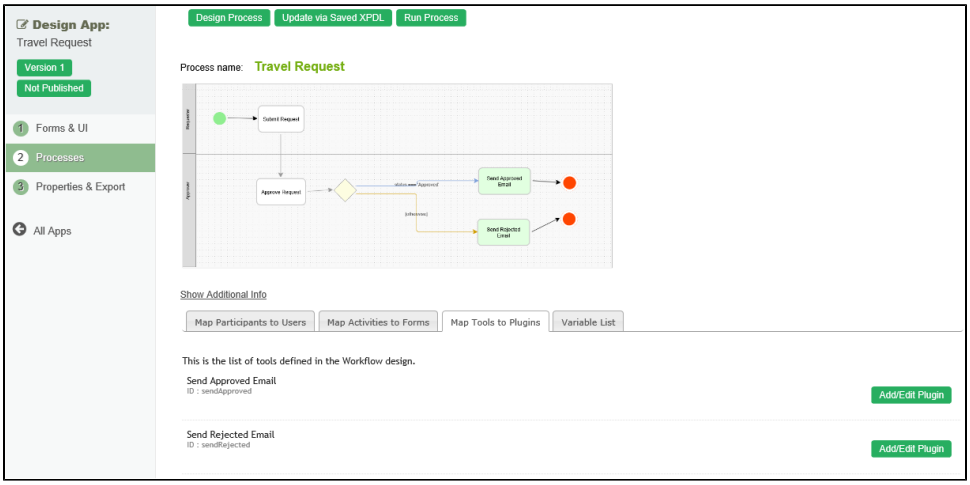


7. After all the configuration, the new approval form should look similar to the following screenshot:

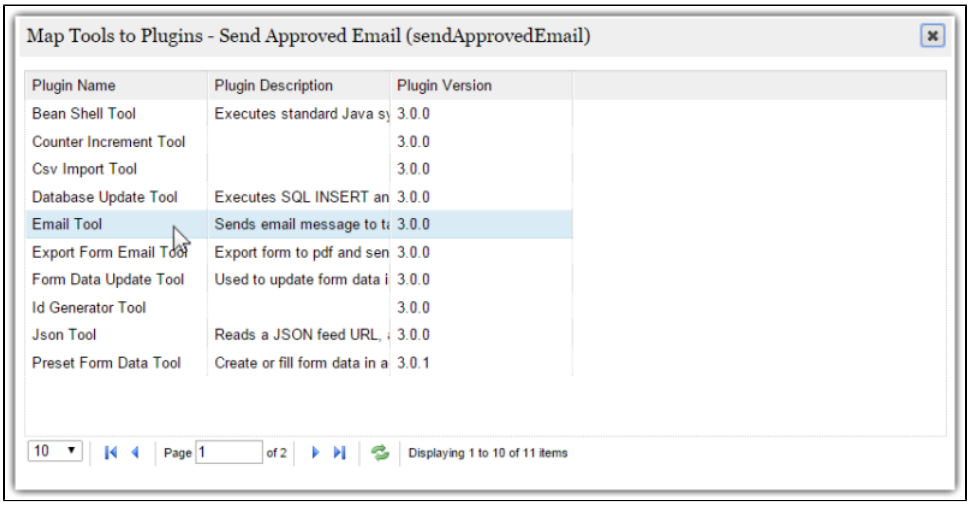


Mapping Tools to Plugins

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

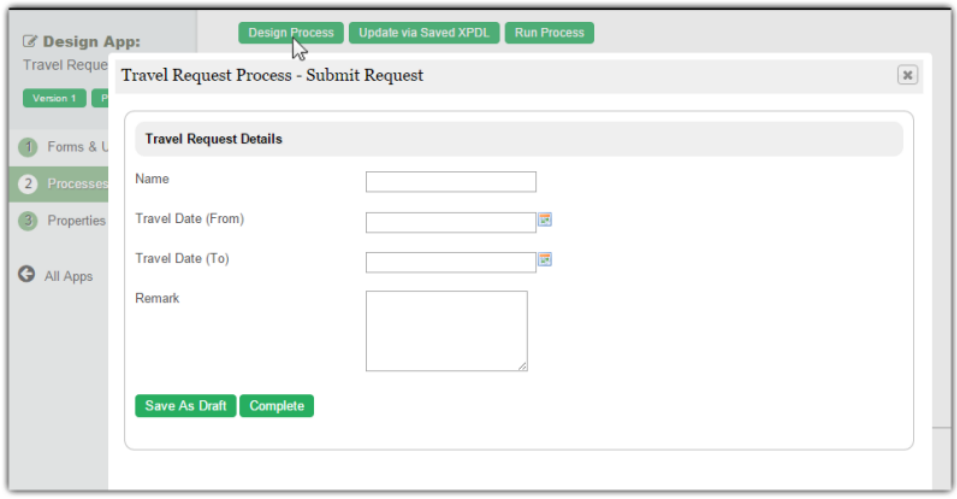


2. For each tool, click on **Add/Edit Plugin** to select and configure a plugin.



Test Driving the Process

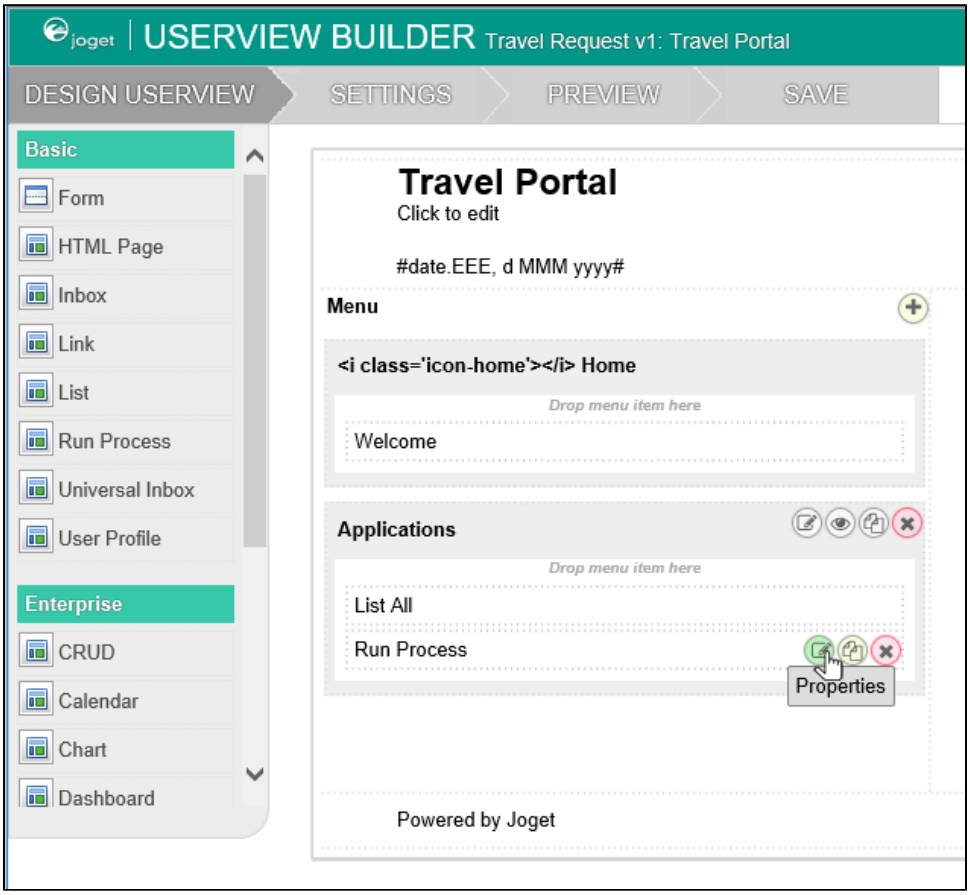
1. To perform a test run on a process, click on the **Run Process** button along the top of the App design process page.



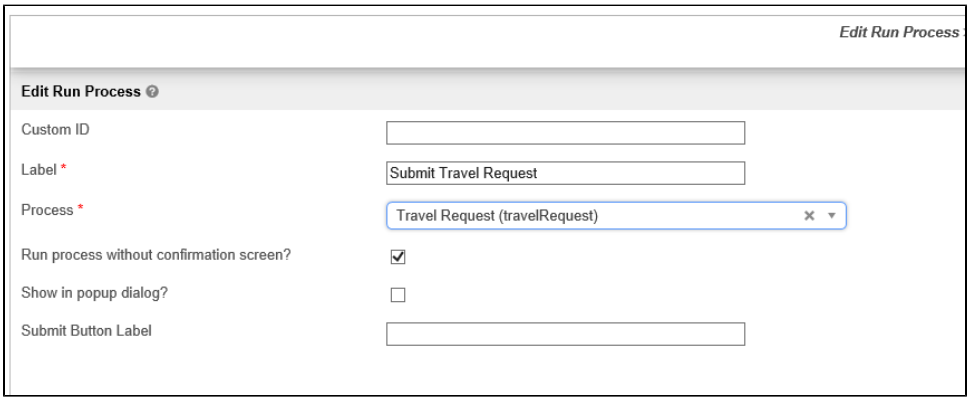
Incorporating the Process into the Userview

1. In the App design page, click on the name of an existing userview to launch the Userview Builder.

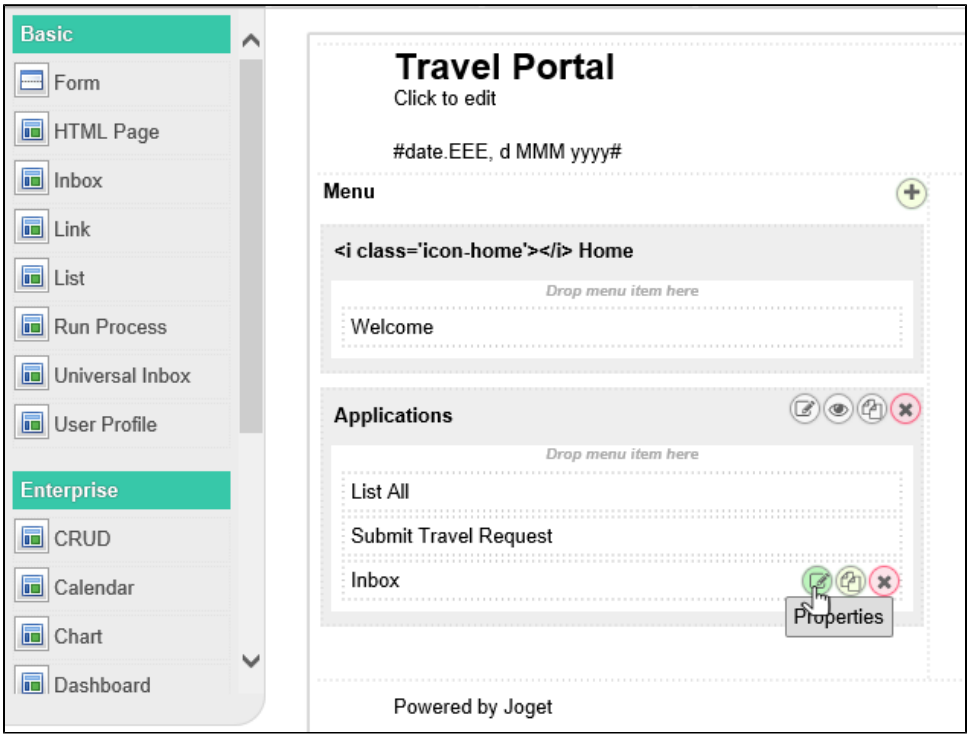
2. Drag a **Run Process** element into a menu category. This menu element allows the user to start a process from the userview.



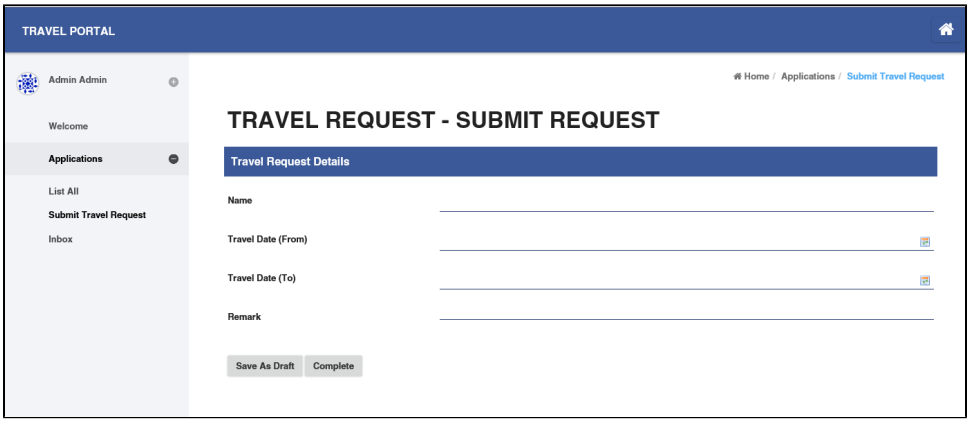
3. Click on **Properties** of the Run Process element and select the process to run.



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



Related Tutorials

- Subflows (Subprocesses)
- Start a Process from External Page
- Sending Reminder Repetitively
- Process thumbnails not showing
- Process Deadlines, Exceptions and SLAs
- Multiple Approval
- Multiple Approval v2 (Thread safe)
- Duplicate Process
- Advanced Participant Mapping

- Process Routes