Generate Process - Approval Process

Introduction

Generate Process - Approval Process function will generate a generic approval process flow together with complementing forms and userview menu items into your existing app from a form.

The form intended to be generated from should be an application/request form.

Design Process   **Configure Mapping**   **Update via Saved XPDL**   **Run Process**

Process name: Request Approval Process

Show Additional Info

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

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

🔍

Applicant
ID : request_applicant   **Add/Edit Mapping**

| Type | Performer |
| Value | Activity Definition ID : runProcess |

Remove Mapping

Approver
ID : request_approver   **Add/Edit Mapping**

| Type | Performer's HOD |
| Value | Activity Definition ID : runProcess |

Remove Mapping

Process Start White List
ID : processStartWhiteList   **Add/Edit Mapping**

| Type | Role |
| Value | Admin |

Remove Mapping

Figure 1: Approval process flow template

Create New Form	Create New Datalist	Create New Userview	
FORMS	**LISTS**	**USERVIEW**	
📄 Request _ testapp2_request	⊞ List - Request	🖥 Approve App	Launch
📄 Request Approval _ testapp2_request			
📄 Request Approval Action _ testapp2_request_a			
📄 Request Clarification _ testapp2_request			

Figure 2: Screenshot highlighting the series of form that is created to complement the process flow

Figure 3: Screenshot showing Generate Process - Approval Process plugin in Generate App function

Figure 4: Generator adds a new category in the userview after generating Approval Process

Generate Process - Approval Process Properties

Options

Generate Process - Approval Process

Options

Options > Advanced Options

Category Label *	`<i class='icon-group'></i> Request Approval Process`
Start Process Menu Label *	Inbox
Start Process Menu Label *	Submit Request
Process Name *	Request Approval Process
Datalist	List - Request
Userview	Approve App

Figure 5: Options Properties

Name	Description
Category Label	Define the category label to be appended into the target Userview below. (see Figure 5)
Start Process Menu Label	Define the Process Start menu label to be created under the new category defined in **Category Label** above.
Process Name	Process Name Label
Datalist	Choose the Datalist to be associated with the Datalist Inbox that will be created in the new Userview category. ⓘ If this is left empty, Create New Datalist Options will be available in **Advanced Options**
Userview	Choose the Userview to append the new Userview category into. ⓘ If this is left empty, Create New Userview Options will be available in **Advanced Options**

Advanced Options

Create New Datalist Options

Create New Datalist Options

Datalist ID *	list_ExpensesClaimNew
Datalist Name *	List - Expense Claim New
Choose Columns *	approval_comments ✕ ApprovedBy ✕ ApprovedDate ✕ claimant ✕ CreatedDate ✕

Figure 6: Options for the new datalist. Only shown when no datalist is selected in the previous options section.

Name	Description
Datalist ID	Datalist ID
Datalist Name	Datalist Name
Choose Columns	Select Columns to be displayed in Datalist. ⓘ AutoComplete enabled. Type column name to display filtered selection.

Create New Userview Options

Create New Userview Options

Userview ID *   v

Userview Name *   Expenses Claim

Userview Description

Figure 7: Options for the new userview. Only shown when no userview is selected in the previous options section.

Name	Description
Userview ID	The ID of the userview
Userview Name	The display name of the userview
Userview Description	A description of the userview

Userview Menu Options

Userview Menu Options

Inbox Menu ID *   request_inbox

Start Process Menu ID *   request_submit

Figure 8: Options for the userview menu

Name	Description
Inbox Menu ID	The ID of the userview menu
Start Process Menu ID	The ID of the start process menu

Participants Label

Participants Label

Approver *   Approver

Applicant *   Applicant

Figure 9: The labels of the participants in the process can be changed.

Activities Label

Activities Label

Clarification *   Clarification

Approval *   Approval

Figure 10: The labels of the activities in the process can be changed.

Tools Label

Tools Label

Update Record Status *   Update Record Status

Email on Received *   Email on Received

Email on Approved *   Email on Approved

Email on Rejected *   Email on Rejected

Figure 11: The labels of the tools used in the process can be changed.

Emails

Figure 12: The contents of the email sent to the participants can be changed.

> **(i) Tip**
>
> You may use Hash Variables to dynamically include information in the email contents.

Forms Name

Figure 13: The name of the forms used in the process can be changed.

Form Fields Label

Figure 14: The labels of the form fields can be changed.

Form Sections Label

Figure 15: The labels of the form sections can be changed.

Status Values

Figure 16: The labels of the statuses in the process can be changed.