

Generate Process - Approval Process

- Introduction
- Generate Process - Approval Process Properties
 - Options
 - Advanced Options
 - Create New Datalist Options
 - Create New Userview Options
 - Userview Menu Options
 - Participants Label
 - Activities Label
 - Tools Label
 - Emails
 - Forms Name
 - Form Fields Label
 - Form Sections Label
 - Status Values

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

Request - testapp2_request
Request Approval - testapp2_request
Request Approval Action - testapp2_request_a
Request Clarification - testapp2_request

LISTS

List - Request

USERVIEW

Approve App
Launch

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

APP GENERATOR ✕

GENERATORS:

- ☐ **GENERATE DATALIST**
[More Info](#) [Advanced Generation](#)
- ☐ **GENERATE CRUD**
[More Info](#) [Advanced Generation](#)
- ☒ **GENERATE PROCESS - APPROVAL PROCESS**
[More Info](#) [Advanced Generation](#)
- ☐ **GENERATE PROCESS - ASSIGNMENT PROCESS**
[More Info](#) [Advanced Generation](#)

Generate

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

USERVIEW BUILDER Purchase Requisition v2: Purchase Requisition (Published)

DESIGN USERVIEW | SETTINGS | PREVIEW | SAVE

Basic

- Form
- HTML Page
- Inbox

Request Approval Process

Drop menu item here

Inbox

Submit Request

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. <div> <i>i</i> If this is left empty, Create New Datalist Options will be available in Advanced Options </div>
Userview	Choose the Userview to append the new Userview category into. <div> <i>i</i> If this is left empty, Create New Userview Options will be available in Advanced Options </div>

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. <div>  AutoComplete enabled. Type column name to display filtered selection. </div>

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

Emails	
Subject (Email on Received) *	Your Application Has Been Received
Message (Email on Received) *	Hi #performer.runProcess.firstName# #performer.runProcess.lastName#,
Subject (Email on Approved) *	Your Application Has Been Approved
Message (Email on Approved) *	Hi #performer.runProcess.firstName# #performer.runProcess.lastName#,
Subject (Email on Rejected) *	Your Application Has Been Rejected
Message (Email on Rejected) *	Hi #performer.runProcess.firstName# #performer.runProcess.lastName#,

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


Tip
 You may use [Hash Variables](#) to dynamically include information in the email contents.

Forms Name

Forms Name	
Approval Form *	Request Approval
Approval Action Form *	Request Approval Action
Clarification Form *	Request Clarification

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

Form Fields Label

Form Fields Label	
Approver *	Approver
Approval Date *	Date
Status Field Label *	Status
Remarks *	Remarks

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

Form Sections Label

Form Sections Label	
Approval *	Approval
Approval Trails *	Approval Trails

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

Status Values

Status Values	
Approved *	Approved
Clarification Required *	Clarification Required
Rejected *	Rejected

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