Generate Process - Approval Process

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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.

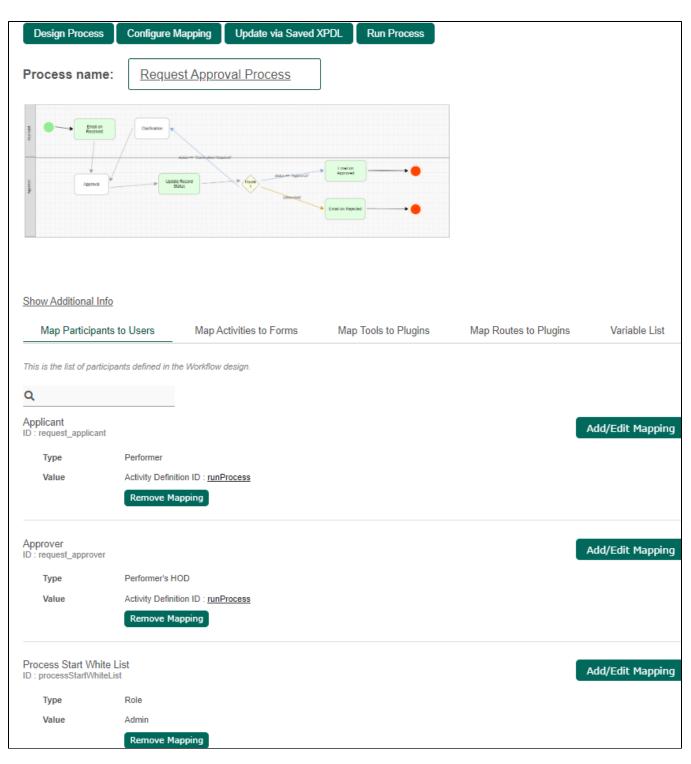


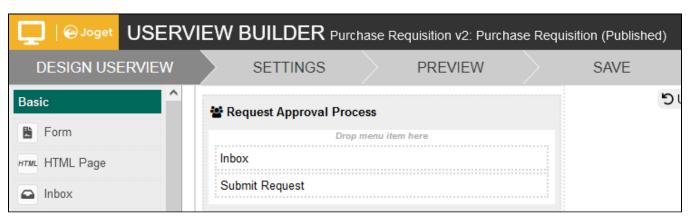
Figure 1: Approval process flow template



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 1 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



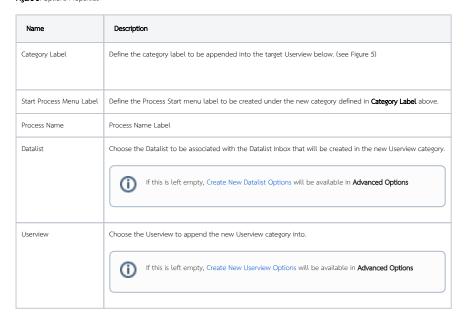
 $\textbf{Figure 4:} \ \ \text{Generator adds a new category in the userview after generating Approval Process}$

Generate Process - Approval Process Properties

Options

Generate Process - Approval Process	
<i class="icon-group"></i> Reque	st Approval Process
Inbox	
Submit Request	
Request Approval Process	
List - Request	× v
Approve App	× v
	ki class='icon-group'> Reque Inbox Submit Request Request Approval Process List - Request

Figure 5: Options Properties



Advanced Options

Create New Datalist Options

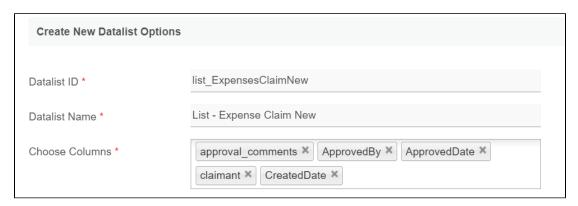


Figure 6: Options for the new datalist. Only shown when no datalist is selected in the previous options section.

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

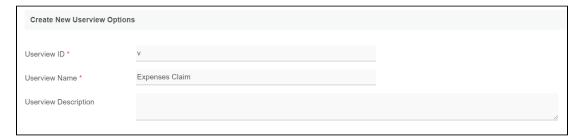


Figure 7: Options for the new userview. Only shown when no userview is selected in the previous options section.

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



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

 $\textbf{Figure 9} \hbox{: } \mbox{The labels of the participants in the process can be changed.}$

Activities Label

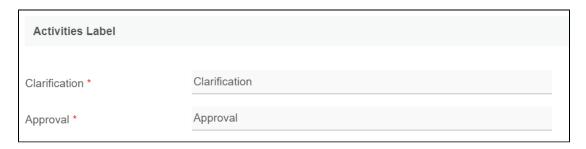


Figure 10: The labels of the activities in the process can be changed.

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

 $\textbf{Figure 11} : \label{eq:figure 11} The labels of the tools used in the process can be changed.$

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.



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.