

Designing a Process

- [Introducing the Workflow Designer](#)
- [Mapping Participants to Users](#)
- [Mapping Activities to Forms](#)
- [Mapping Tools to Plugins](#)
- [Test Driving the Process](#)
- [Incorporating the Process into the Userview](#)

Introducing the Workflow Designer

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

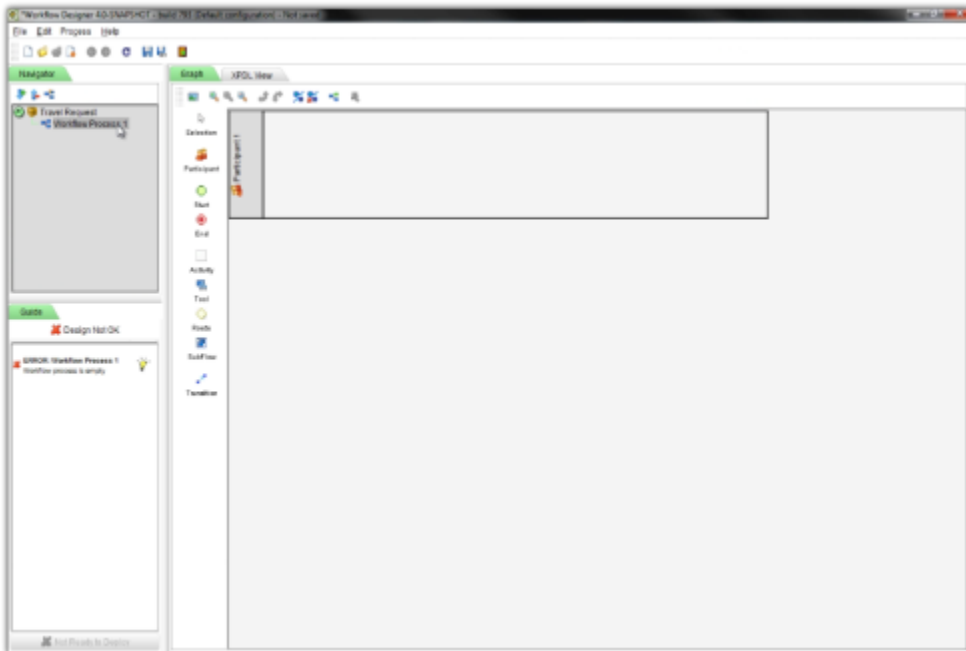


2. The Workflow Designer uses a technology called Java Web Start and requires Java to be installed on the PC. If a JNLP file is downloaded, open it with the **Java Web Start Launcher**. The Workflow Designer will be downloaded to the PC the first time it is launched, or when there are any updates.

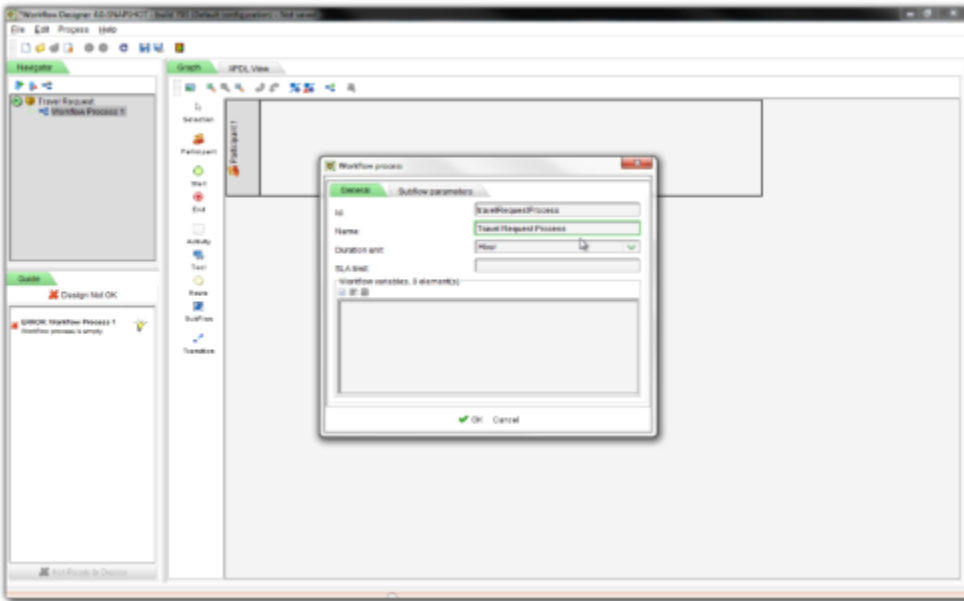
In the Community Edition, if you encounter a security problem launching the Workflow Designer with the message: **"Java applications are blocked by your security settings"**, this is due to [security changes introduced in Java 7 Update 51](#) onwards for self-signed certificates. There are several solutions for this in the article [Java Security Settings for the Workflow Designer](#).

Note that the Workflow Designer in the Enterprise Edition is not affected by this as it fully signed and supported by the Joget Team.

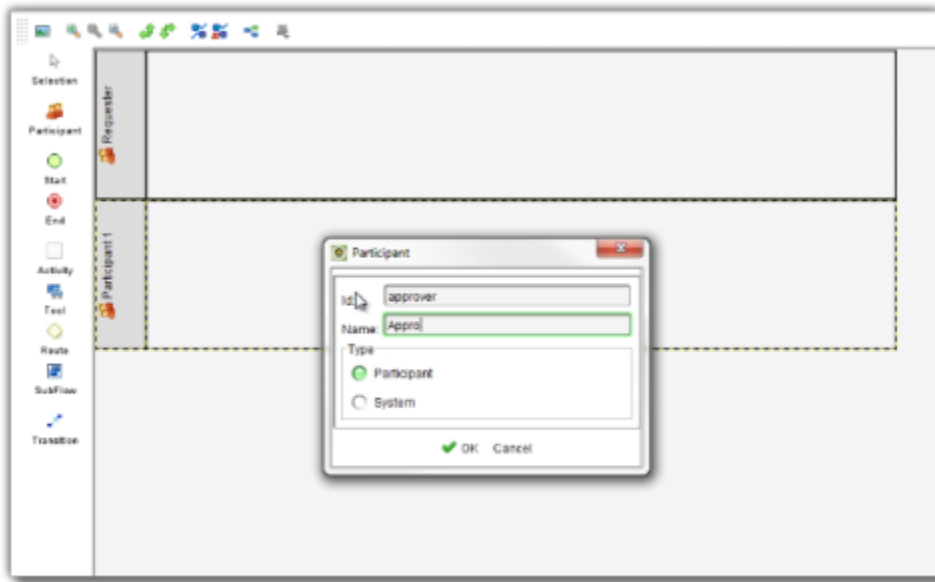
3. There are 3 main areas in the Workflow Designer. On the top left, the **Navigator** panel contains a list of processes. The bottom left **Guide** panel provides hints and warnings. The main panel in the middle is the **Graph** area that contains a palette and the process diagram.



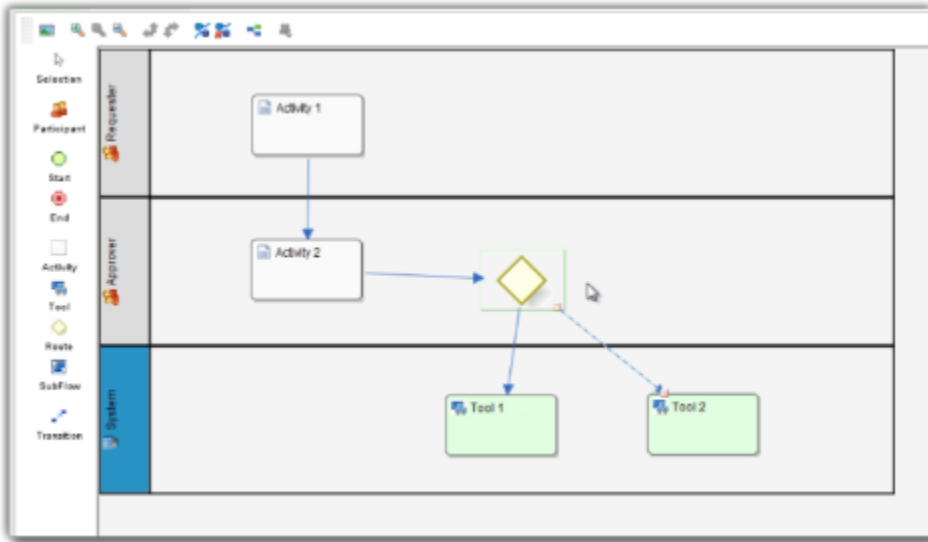
4. Right click on the process name in the Navigator and select **Properties**, or **double click** on the process name. This brings up the properties dialog where you can edit the process details.



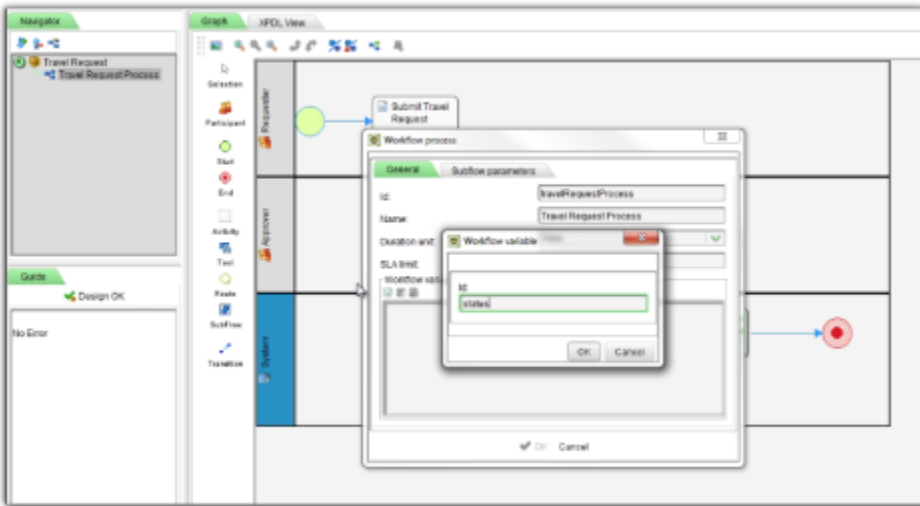
5. Add **Participants** into the process by dragging the participant icon from the palette into the process diagram. Each participant is displayed as a horizontal swimlane. Participants represent users or roles that perform a certain task. Double click on the participant name to set its properties.



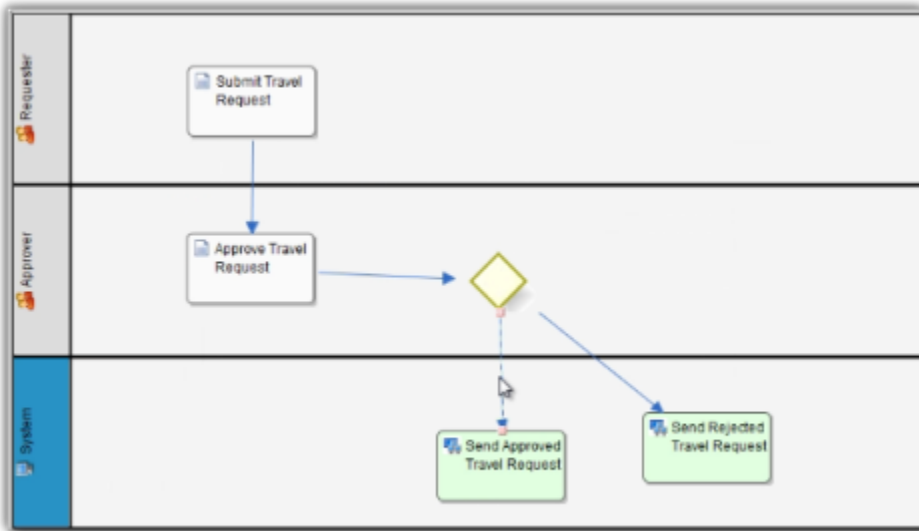
6. Add **activities**, **tools** and **routes** into the process diagram. Activities represent forms which require human interaction. Tools represent system or automated tasks, and routes are decision points. Use **transitions** to link them all together in a flow.



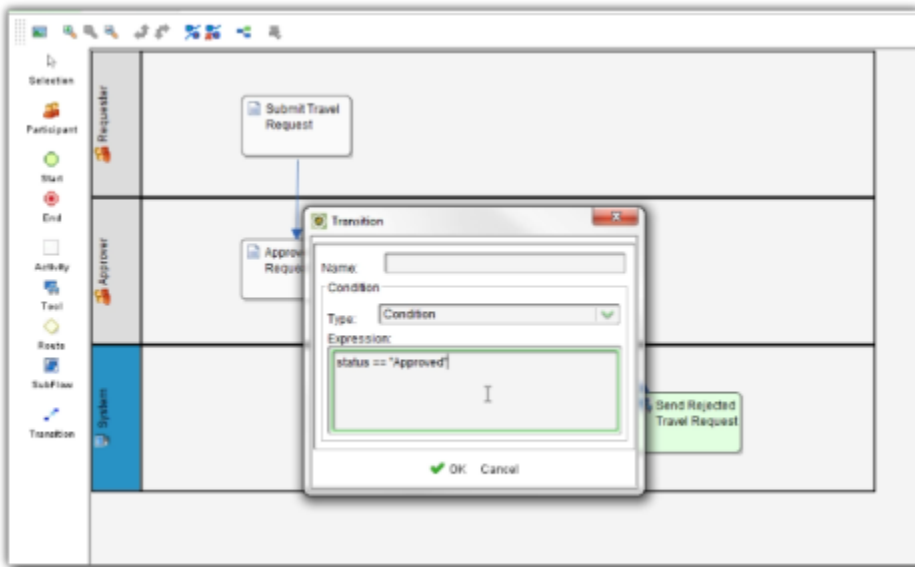
7. To handle routing (for example approval conditions), use **Routes** in combination with **workflow variables**. To create a workflow variable, double click on the process name in the Navigator to bring up the process dialog. Click on the first small icon under the Workflow variable heading, and key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



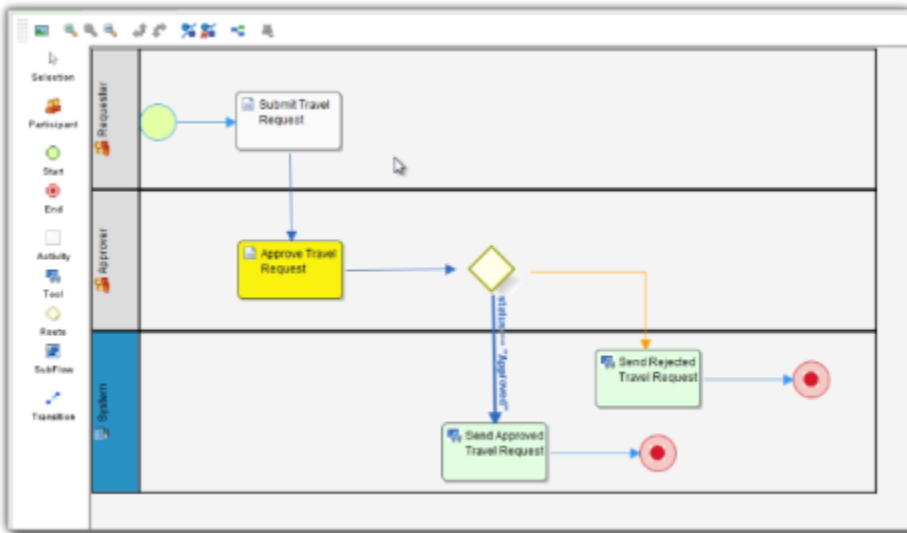
8. Once a workflow variable has been defined, **double click** on a transition to open the transition dialog.



9. In the transition dialog, select type **Condition**, and key in a JavaScript-style condition in the **Expression** textbox e.g. `status == 'Approved'` means that this transition will occur if the value of status is "Approved".



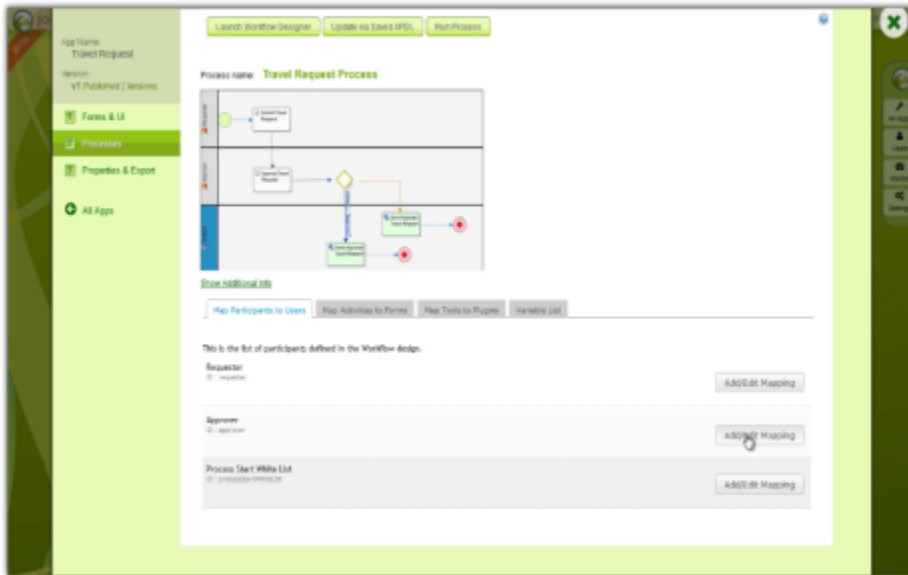
10. Set the transition type to **Otherwise** to indicate that it is the default path to take when other conditions are not met. The Otherwise transition is shown in orange. An example of a simple routing process is as shown below:



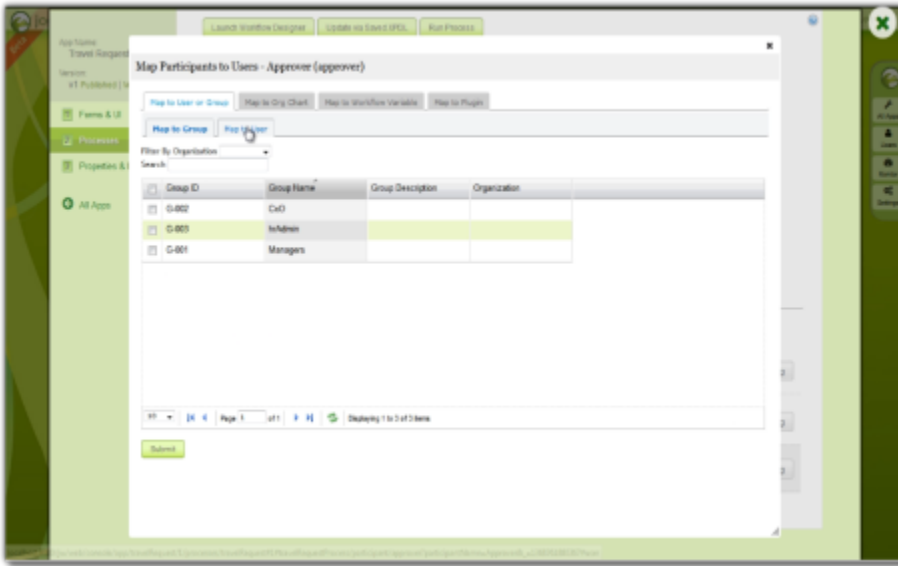
11. Ensure that the process has a proper **Start** and **End**. Once the **Guide** indicates that the process is valid, the **Deploy** button will be enabled. Click on **Deploy** to deploy the process to the server.

Mapping Participants to Users

12. Once a process has been successfully deployed, the Workflow Designer will close. Click on **OK** in the App design page to load the process details.



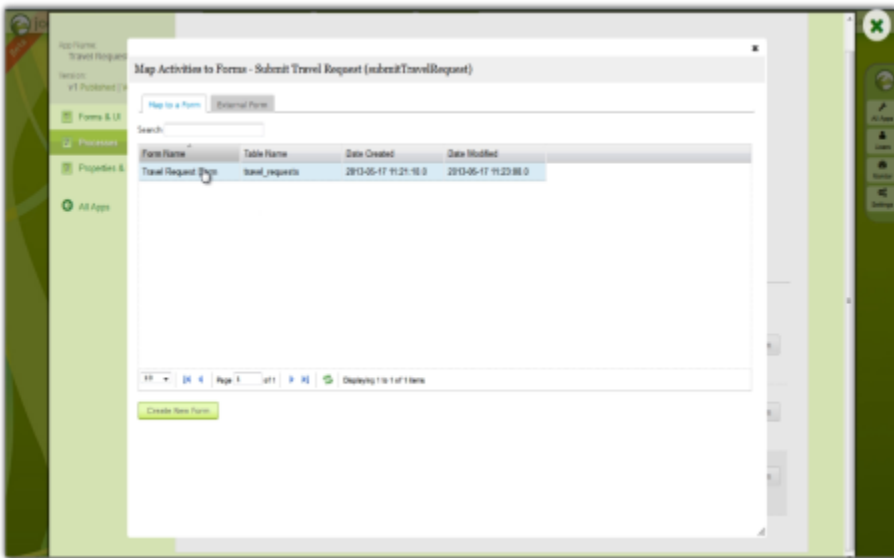
13. Participants defined in the process are listed in the **Map Participants to Users** tab, and you can map each participant to specific people. Click on **Add/Edit Mapping** to map to specific groups, users, organization chart, etc. If no mapping is done for a participant, any tasks are automatically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



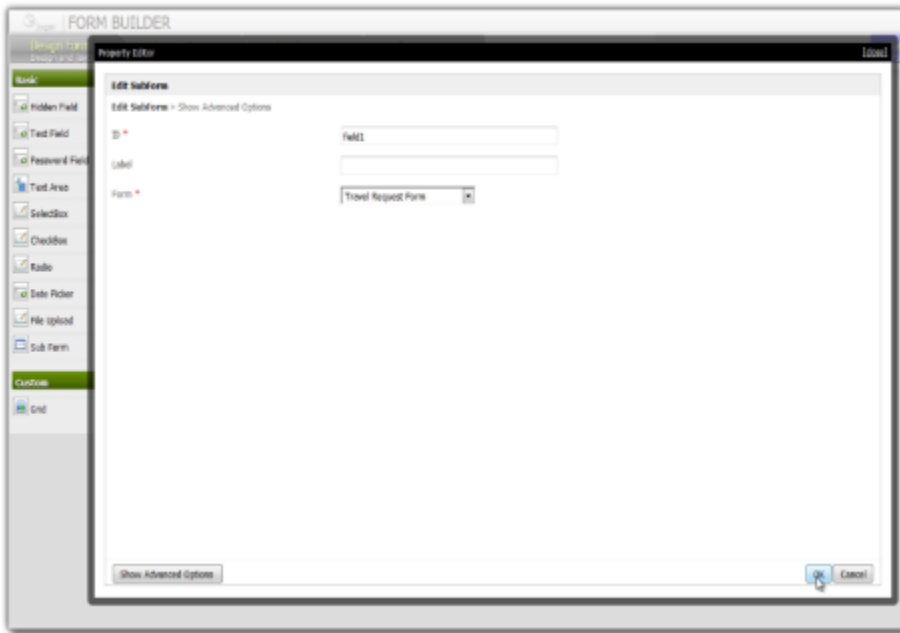
SECURITY NOTE: There is a special participant mapping [Process Start White List](#) which defines who is permitted to start the process. For newly deployed processes, the Process Start White List is set to the admin role by default for security reasons. This can be changed accordingly, or removed altogether to allow anonymous access.

Mapping Activities to Forms

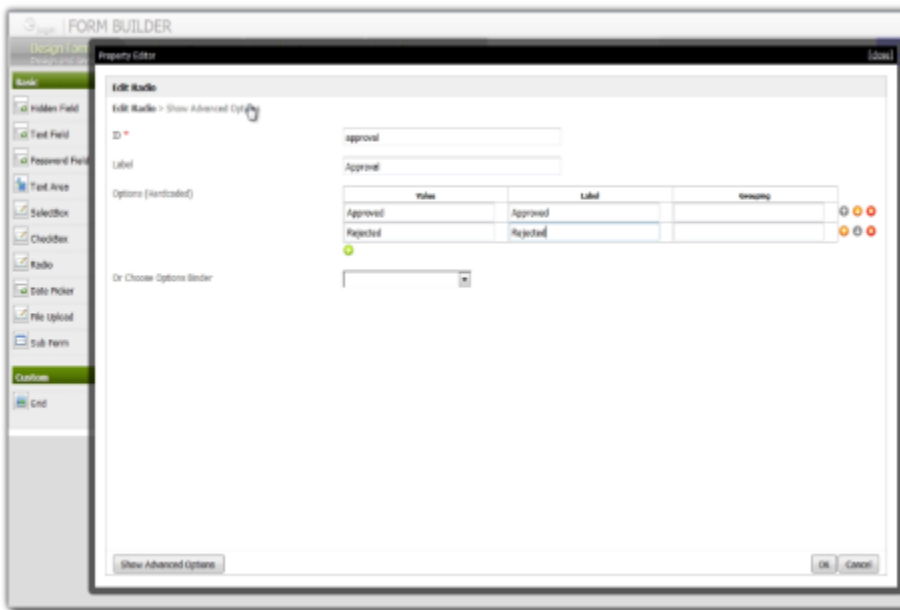
- In the **Map Activities to Forms** tab, all process activities are listed.
- For each activity, click on **Add/Edit Form** to select from a list of current forms in the app.



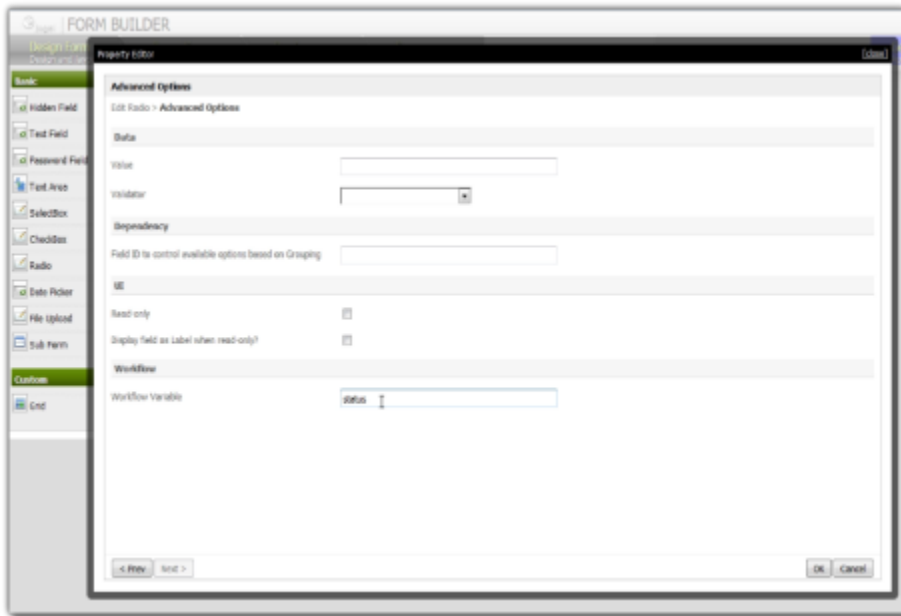
- As an example to handle an approval process, click on **Create New Form** to create a new approval form. In this new form, add a **Subform** that displays the original submitted form, and **radio** buttons to capture the approval status.
- Configure this subform to select the original request form.



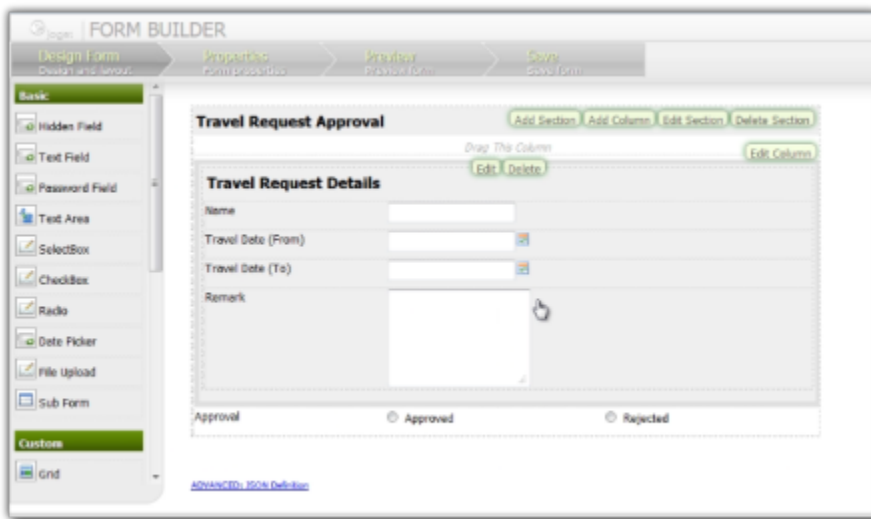
18. Configure the **status** radio button to have Approved and Rejected options.



19. 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.

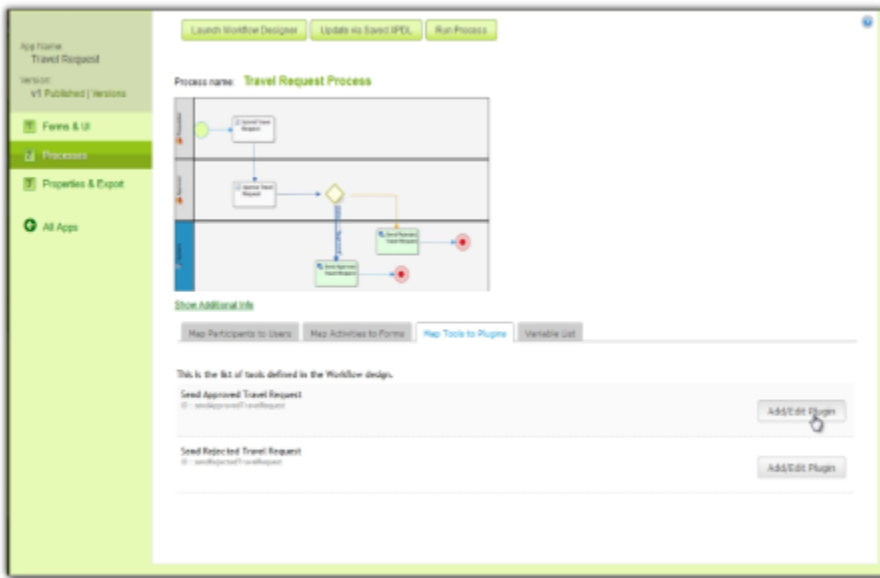


20. After all the configuration, the new approval form should look similar to the following screenshot:

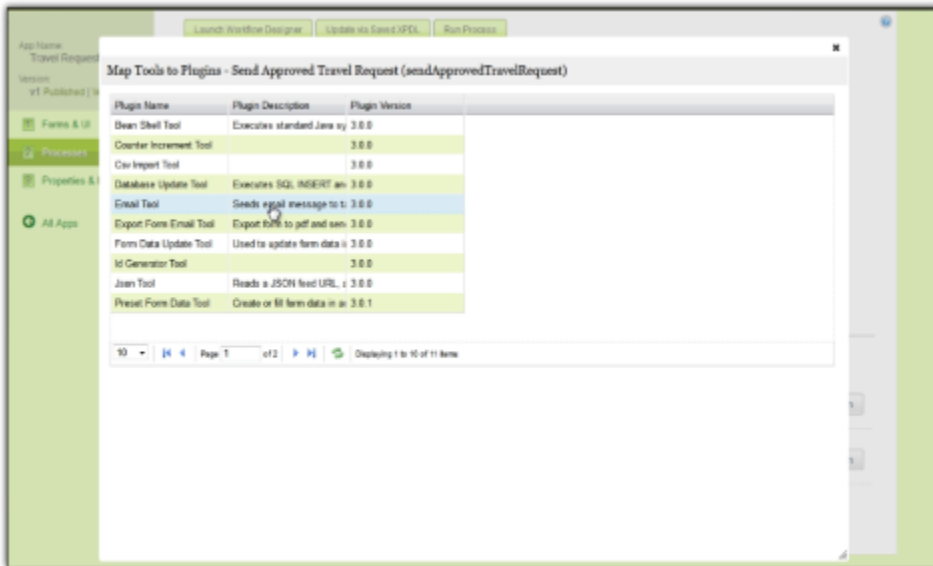


Mapping Tools to Plugins

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

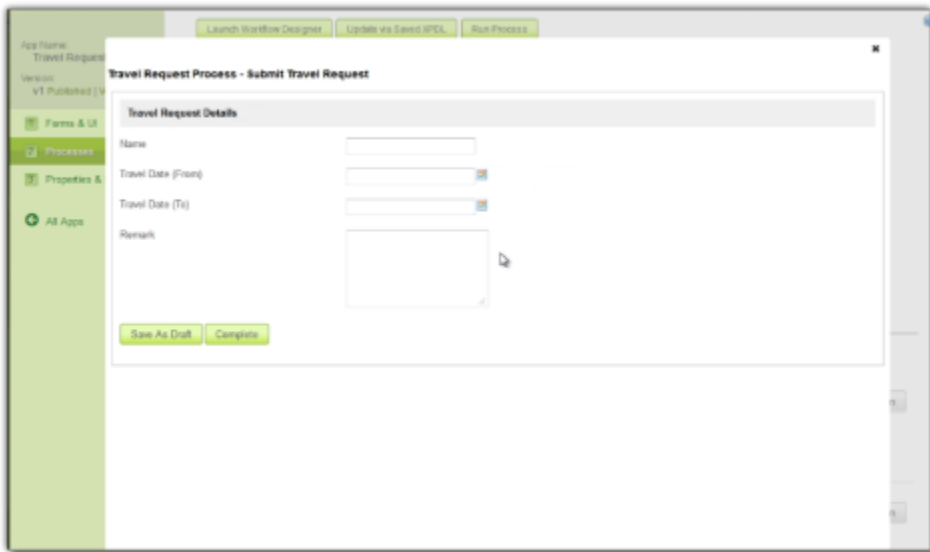


22. For each tool, click on **Add/Edit Plugin** to select and configure a plugin.



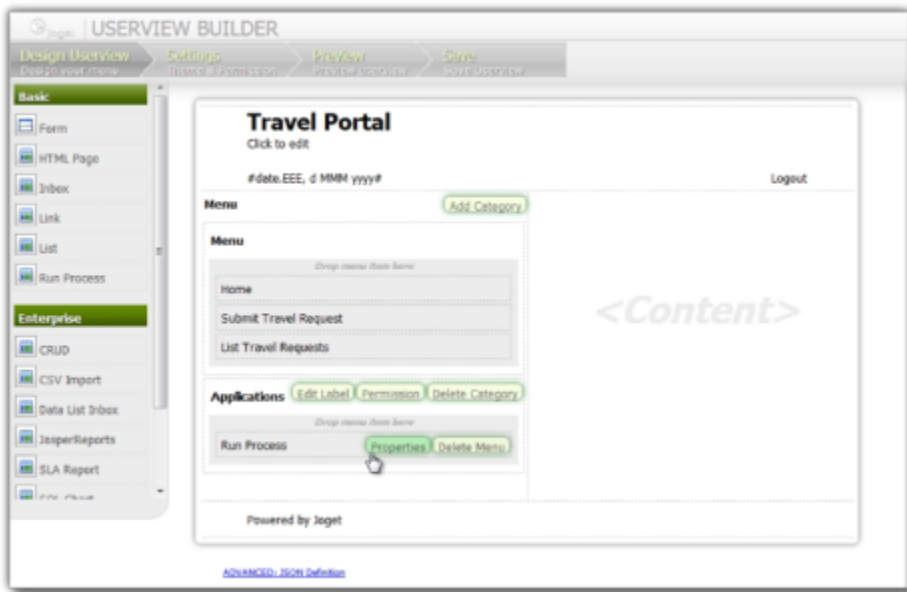
Test Driving the Process

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

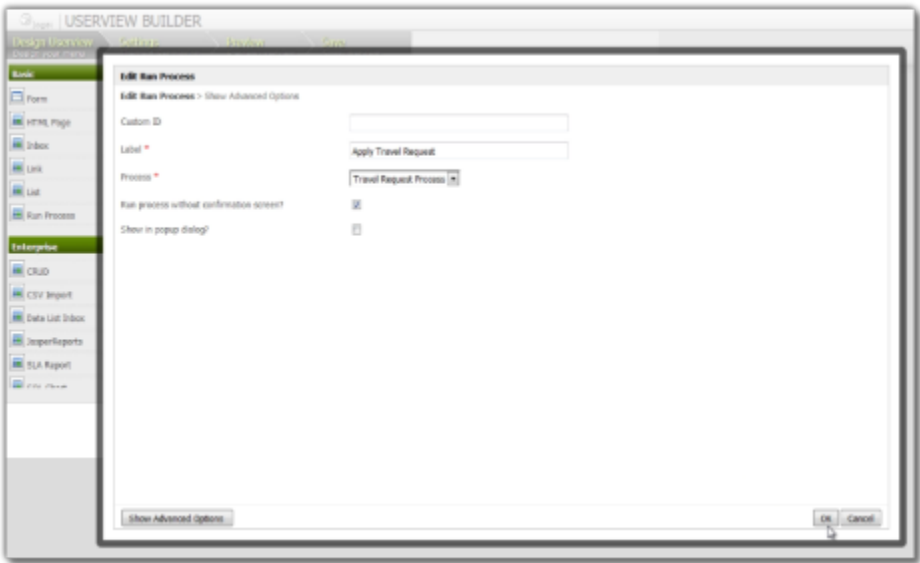


Incorporating the Process into the Userview

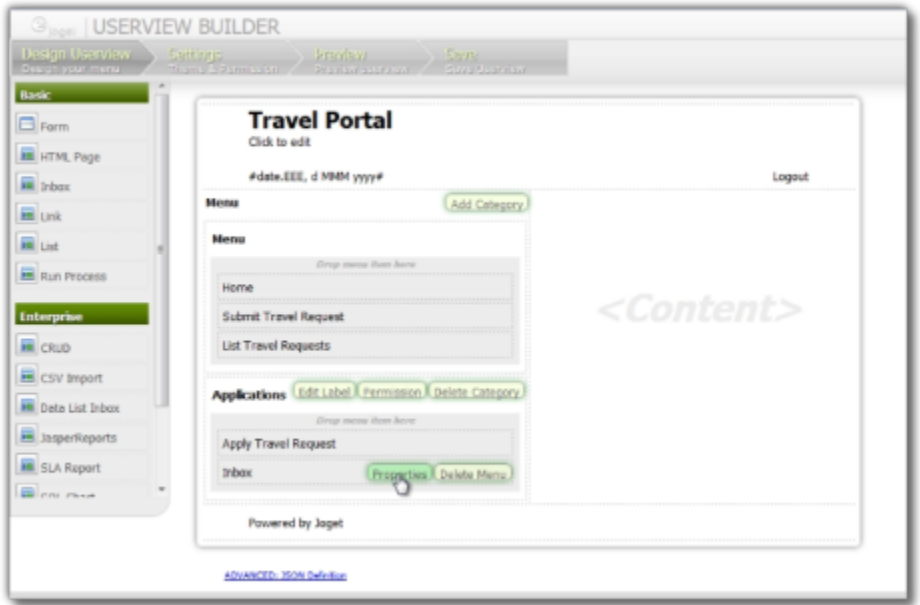
24. In the App design page, click on the name of an existing userview to launch the Userview Builder.
25. Drag a **Run Process** element into a menu category. This menu element allows the user to start a process from the userview.



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



27. Drag an **Inbox** element into a menu category. This menu element provides the user with an inbox to manage their assigned workflow tasks.



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

Menu

- Home
- Submit Travel Request
- List Travel Requests

Applications

- Submit Travel Request
- Inbox

Travel Request Process - Submit Travel Request

Travel Request Details

Name	<input type="text" value="Admin"/>
Travel Date (From)	<input type="text" value="05/29/2013"/>
Travel Date (To)	<input type="text" value="05/31/2013"/>
Remark	<input type="text"/>