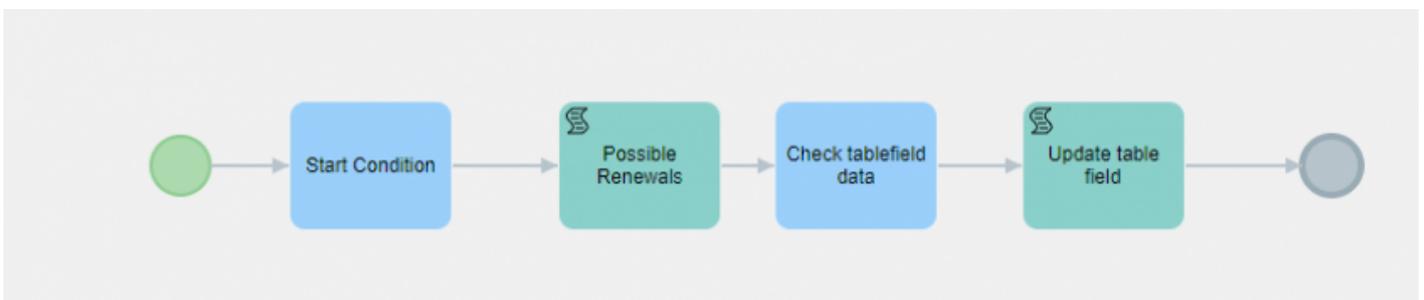


1 - Basic Process configuration - Installation renewals



Let's proceed with the creation of an easy process to manage the renewal of an Asset. When an installation expires the user will switch the Status to "Out of Order". At this point the process will begin. An eventual renewal will be notified to the user in charge through a pop up. Once one ore more renewals are inserted the record will be updated.

Below you can display the process.

To enable it tick the "Active" box, once ended the chart and the settings.

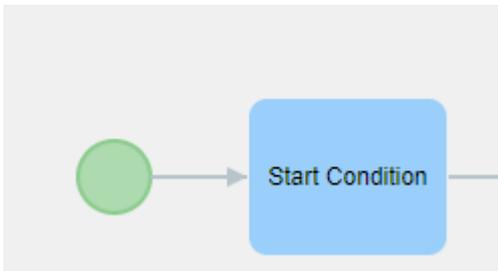
Settings > Process manager

EDIT DIAGRAM BACK vtenex

Name	Description
Asset Renewals	
Active	Version
no	1.0

Diagram

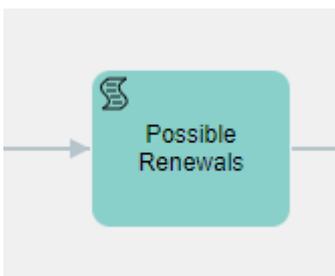
```
graph LR; Start(( )) --> StartCondition[Start Condition]; StartCondition --> PossibleRenewals[Possible Renewals]; PossibleRenewals --> CheckTablefieldData[Check tablefield data]; CheckTablefieldData --> UpdateTablefield[Update table field]; UpdateTablefield --> End(( ))
```



This is the first Task of the process.

As previously said, this must be a Condition Task in order to define the starting entity and its starting features.

In this case the starting entity is the Asset module and the process will begin when the record status will be set on “Out of Service” and a previous renewal is not present, that is to say renewals lines (Table field) equal to zero.



In the following Task, ScriptTask, the Process Helper is set in order to show the pop up to the assignee for possible renewals.

It is then assigned to the latter by “picking” the assignee of the module from the picklist, we link the entity Assets (related ID), we select the checkbox “show popup in the linked entity” and we include a block with the desired fields. In this case there are two fields:

- **Table field with the same fields as the one previously created**
- **Note field for any reports**

BPMN-ScriptTask: Possible Renewals ScriptTask_0rvalv

Actions

No actions configured

Process Helper

Assigned To: Other | Assigned To | Related to: ID

Status: Running | Process Name: Seleziona Opzione...

Instructions: Seleziona Opzione... Show popup in the related entity

Manage dynamic form

RENEWALS INFO

Possible Renewals	Renewals Notes
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BPMN-ScriptTask: Possible Renewals ScriptTask_0rvalv

Add table field

Field Label Possible Renewals

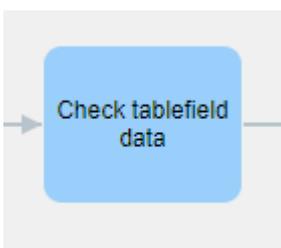
Columns

- Text
- Text Area
- Number
- Number with decimals
- Percentage

Selected Columns:

Name	Date Start	Date End	Contact Email	Contact Phone	Description
<input type="checkbox"/> Text	<input type="checkbox"/> Date	<input type="checkbox"/> Date	<input type="checkbox"/> Email	<input type="checkbox"/> Phone	<input type="checkbox"/> Text Area
Length: 200	Permissions: Read/Write	Permissions: Read/Write	Permissions: Read/Write	Permissions: Read/Write	Permissions: Read/Write
Mandatory Field: <input checked="" type="checkbox"/>	Mandatory Field: <input checked="" type="checkbox"/>	Mandatory Field: <input checked="" type="checkbox"/>	Mandatory Field: <input type="checkbox"/>	Mandatory Field: <input type="checkbox"/>	Mandatory Field: <input type="checkbox"/>
Vai a capo: <input type="checkbox"/>	Vai a capo: <input type="checkbox"/>	Vai a capo: <input type="checkbox"/>	Vai a capo: <input type="checkbox"/>	Vai a capo: <input type="checkbox"/>	Vai a capo: <input type="checkbox"/>

This is the table field shown in the pop up, the one that, once filled, will be updated in the linked record. In fact the inserted fields are the same as the ones created in the module.



At this point, we check if the user has filled the renewal fields. It is possible to check the number of lines inserted, for example “minimum one”, or check, like in this case, if the user has inserted the renewal notes. The reference entity it’s the dynamic form previously set. The process is on hold until that condition is true.

The screenshot shows the configuration for a BPMN-Task named "BPMN-Task: Check tablefielddata". The task is associated with the entity "[SDF4] Form dinamica (BPMN-ScriptTask: Possible Renewals)". Under "When to run the check", the option "every time the condition is true" is selected. The "Conditions" section contains a single condition: "Renewals Notes" is "diverso" (different) from an empty field. There are "SAVE" and "CANCEL" buttons at the top right, and a "NEW GROUP" button next to the conditions list.



Once the conditional Task is done we proceed with the update of the renewal/s. Therefore we create a Script Task with a Cycle type action. We cycle the number of line inserted in the dynamic form (Possible Renewal field) and for every line “Add tab line” in the field “Renewal” created in the module. Doing so the lines inserted in the pop up will be reported in the record.

The screenshot shows the configuration for a BPMN-ScriptTask named "BPMN-ScriptTask: Update table field". The task is associated with the entity "[SDF4] Form dinamica (BPMN-ScriptTask: Possible Renewals)". The configuration shows: "Create a new action" set to "Cycle", "on field" set to "Possible Renewals", "and for each row" set to "Insert table row", and "on field" set to "Renewals". There are "CREATE" and "CANCEL" buttons below the configuration. A dropdown menu is open for the "Renewals" field, showing options: "[S5] Assets (BPMN-Task: Start Condition)", "Rinnovi", "[SDF4] Form dinamica (BPMN-ScriptTask: Possible Renewal)", and "Possible Renewals". Below the configuration is an "Actions" table with one entry: "Add Renewal". There are "SAVE", "CANCEL", and "ADVANCED..." buttons at the top right, and a "NEW ACTION" button.

Tools	Action
	Add Renewal

Action: Cycle

SAVE CANCEL

Action title Add Renewal

Insert row in Renewals of [\$5] Assets (BPMN-Task: Start Condition)

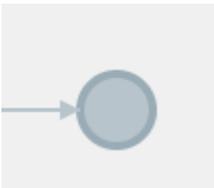
Conditions on field Possible Renewals of [\$DF4] Form dinamica (BPMN-ScriptTask: Possible Renewals) NEW GROUP

Information

Name	Possible Renewals: Name	Select...	Date Start
\$DF4-vcf_2-vcf_3:curr		Select... Somma Minimo Massimo Media Last Current Sequence	Possible Renewals: Date Start
Date End			+ ▼ ... days ▼
Possible Renewals: Date End			Contact Email
+ ▼ ... days ▼			\$DF4-vcf_2-vcf_6:curr
Contact Phone	Seleziona Opzione... ▼	Description	Seleziona Opzione... ▼
\$DF4-vcf_2-vcf_7:curr		\$DF4-vcf_2-vcf_8:curr	

Now we proceed by updating the existing fields.

For each of them we take the entity contained in the Dynamic Form and we select the value "Current" in the pick list, in order to obtain the correct value for each line. Even if this is not the case, if we wanted we could for example obtain the sum or the average of different fields from different lines.



We complete the process by setting the End Event, changing the status in "Ended" and linking it to the entity (Assets).

BPMN-EndEvent EndEvent_1160010

Actions

No actions configured

Process Helper

Assigned To	Assigned To	Related to
Other	Assigned To	--Please select--
Status		--Please select--
Ended		[\$] Assets (BPMN-Task: Start Condition)
Instructions	Seleziona Opzione...	ID
		Product Name
		Invoice Name
		Customer Name
		Sales Order

Manage dynamic form

Revision #5

Created 18 April 2019 15:21:21 by Admin

Updated 2 November 2019 11:24:32