

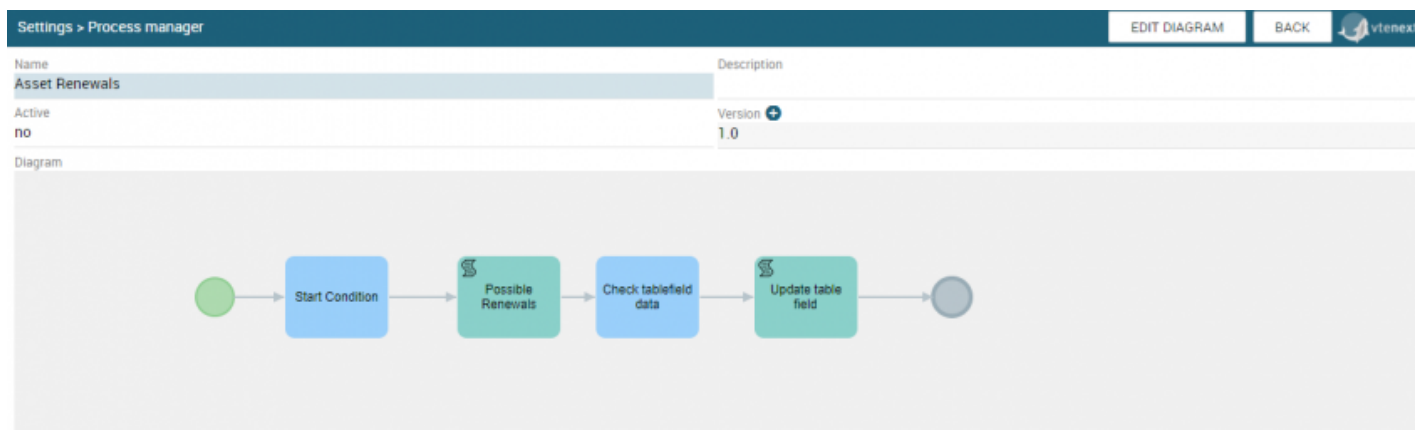
1 - Basic Process configuration - Installation renewals

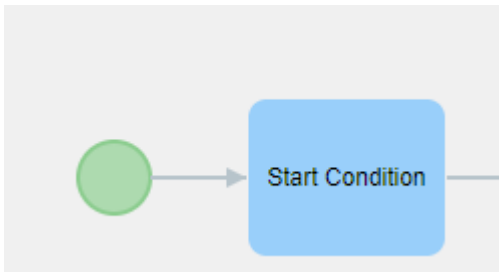


Let's proceed with the creation of an easy process to manage the renewal of an Asset. When an installation expires the user will switch the Status to "Out of Order". At this point the process will begin. An eventual renewal will be notified to the user in charge through a pop up. Once one ore more renewals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





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.

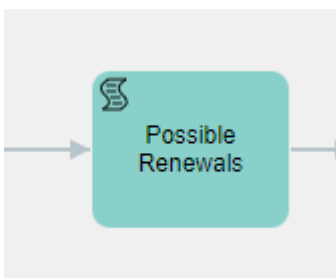
The screenshot shows the 'BPMN-Task: Start Condition' configuration window. At the top, the title is 'BPMN-Task: Start Condition' and the task ID is 'Task_1k02qse'. There are 'SAVE' and 'CANCEL' buttons. Below the title bar, the 'Entity' is set to 'Asset'. Under 'When to run the check', the options are:

- ☐ on create
- ☐ on create / change
- ☒ on change
- ☐ every time the condition is true
- ☐ when executed subprocess

 The 'Conditions' section contains a table with two rows:

Status	è cambiato in	Out-of-service	E	
Rinnovi	ha esattamente	0	right	

 There is a 'NUOVA CONDIZIONE' button and a 'NEW GROUP' button. A close button (X) is in the top right corner of the conditions area.



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_0rnvalv

SAVE

CANCEL

ADVANCED...

NEW ACTION

Actions

No actions configured

Process Helper

Assigned To

Other

Assigned To

Related to

ID

Status

Running

Instructions

Seleziona Opzione...

☐

Show popup in the related entity

Manage dynamic form

ADD BLOCK

IMPORT BLOCK...

RENEWALS INFO

Possible Renewals

Renewals Notes

BPMN-ScriptTask: Possible Renewals

ScriptTask_0rnvalv

Add table field

SAVE

CANCEL

Field Label

Possible Renewals

Text

Text Area

Number

Number with decimals

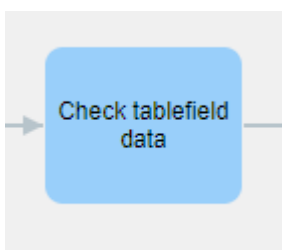
Percentage

ADD SELECTED

Selected Columns:

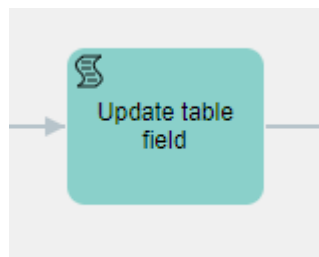
<div>Name</div> <div>Text</div> <div>Length: 200</div> <div>Permissions</div> <div>Read/Write</div> <div>Mandatory Field</div> <div><input checked="" type="checkbox"/></div> <div>Vai a capo</div> <div><input type="checkbox"/></div>	<div>Date Start</div> <div>Date</div> <div>Permissions</div> <div>Read/Write</div> <div>Mandatory Field</div> <div><input checked="" type="checkbox"/></div> <div>Vai a capo</div> <div><input type="checkbox"/></div>	<div>Date End</div> <div>Date</div> <div>Permissions</div> <div>Read/Write</div> <div>Mandatory Field</div> <div><input checked="" type="checkbox"/></div> <div>Vai a capo</div> <div><input type="checkbox"/></div>	<div>Contact Email</div> <div>Email</div> <div>Permissions</div> <div>Read/Write</div> <div>Mandatory Field</div> <div><input type="checkbox"/></div> <div>Vai a capo</div> <div><input type="checkbox"/></div>	<div>Contact Phone</div> <div>Phone</div> <div>Permissions</div> <div>Read/Write</div> <div>Mandatory Field</div> <div><input type="checkbox"/></div> <div>Vai a capo</div> <div><input type="checkbox"/></div>	<div>Description</div> <div>Text Area</div> <div>Permissions</div> <div>Read/Write</div> <div>Mandatory Field</div> <div><input type="checkbox"/></div> <div>Vai a capo</div> <div><input type="checkbox"/></div>
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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 "Check tablefielddata". The task is associated with the entity "[SDF4] Form dinamica (BPMN-ScriptTask: Possible Renewals)". Under the "When to run the check" section, 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. A "NEW GROUP" button is visible on the right. At the bottom, there is a "NUOVA CONDIZIONE" button.



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 "Update table field". The task is associated with the entity "[SDF4] Form dinamica (BPMN-ScriptTask: Possible Renewals)". Under the "Create a new action" section, the action type is "Cycle" on the field "Possible Renewals", and for each row, the action is "Insert table row" on the field "Renewals". 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". The "Add Renewal" option is selected. The "Actions" section shows a table with "Tools" and "Action" columns, containing the action "Add Renewal". There are "SAVE", "CANCEL", and "ADVANCED..." buttons at the top right, and a "NEW ACTION" button on the right. A "Process Helper" checkbox is at the bottom left.

Action: Cycle

SAVE CANCEL

Action title Add Renewal

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

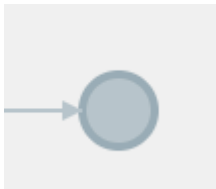
Conditions on field Possible Renewals of [\$DF4] Form dinamica (BPMN-ScriptTask: Possible Renewals) NEW GROUP

Information

Name	Possible Renewals: Name	Select...	Date Start
\$DF4-vcf_2-vcf_3:curr		Select...	Possible Renewals: Date Start
		Somma	+ ▼ *** days ▼
		Minimo	
		Massimo	
		Media	Contact Email
		Last	\$DF4-vcf_2-vcf_6:curr
		Current	Seleziona Opzione... ▼
		Sequence	
Date End	Possible Renewals: Date End		
+ ▼ *** days ▼			
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_11f60010

SAVE

CANCEL

ADVANCED...

NEW ACTION

Actions

No actions configured

Process Helper

Assigned To

Other

Assigned To

Status

Ended

Instructions

Seleziona Opzione...

Related to

--Please select--

--Please select--

[\$5] Assets (BPMN-Task: Start Condition)

IO

Product Name

Invoice Name

Customer Name

Sales Order

Manage dynamic form

ADD BLOCK

IMPORT BLOCK...

Revision #5

Created 18 April 2019 15:21:21 by Admin

Updated 2 November 2019 11:24:32