1.6 Process Helper Section: Introduction and Usage Guide

INTRODUCTION

The Process Helper, as the name suggests, is a tool designed to assist those configuring processes by allowing them to create “structures” for requesting and storing data, known as “Dynamic Forms.”

It consists of two main sections:

HEADER FIELDS

DYNAMIC FORM

USAGE GUIDE

Specifically, there are several ways to use this tool. Below are the main ones:

1) Using Process Helpers (and their Dynamic Forms) to create custom forms for Internal/External/Business Portal users to request and save information

Examples:

USING PROCESS HELPER TO REQUEST DATA FROM INTERNAL USERS

USING PROCESS HELPER TO REQUEST DATA FROM EXTERNAL USERS

USING PROCESS HELPER TO REQUEST DATA FROM BUSINESS PORTAL USERS

2) Using Process Helpers to activate the “Process Graph” section, enabling you to:

- Monitor the progress of a single process instance along with the actors involved
- Perform direct maintenance on active process instances

Example:

USING PROCESS HELPER TO ACTIVATE THE PROCESS GRAPH

3) Using Process Helpers (and their Dynamic Forms) to create virtual spaces for storing data or performing operations that are needed only within the process (and therefore do not need to be saved in CRM modules)

Example:

USING PROCESS HELPER FOR INTERNAL PROCESS USE

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