

# 5.6 Advanced Section

This section allows you to set advanced rules to manage the permissions for the fields of the dynamic forms involved in the process.

To access them, click the "Advanced" button available within any Action Task (Figure 1).

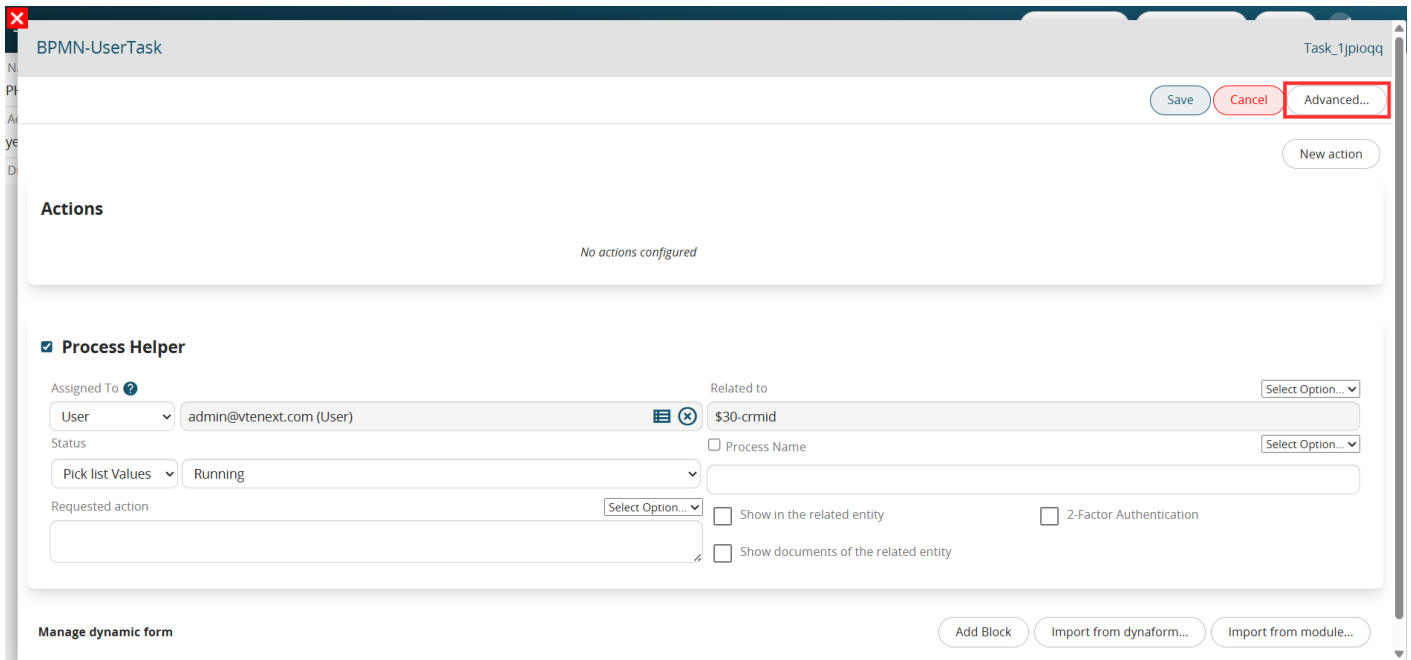
The image shows a software window titled "BPMN-UserTask" with a task ID "Task\_1jpioqq". In the top right corner, there are three buttons: "Save", "Cancel", and "Advanced...", with the "Advanced..." button highlighted by a red rectangle. Below these buttons is a "New action" button. The main area is labeled "Actions" and contains the text "No actions configured". Below this is a section titled "Process Helper" with a checked checkbox. It contains several configuration fields: "Assigned To" with a dropdown set to "User" and a text field with "admin@vtenext.com (User)"; "Status" with a dropdown set to "Running"; "Requested action" with a "Select Option..." dropdown; "Related to" with a dropdown set to "\$30-crmid"; "Process Name" with a "Select Option..." dropdown; and three checkboxes: "Show in the related entity", "Show documents of the related entity", and "2-Factor Authentication". At the bottom left is a "Manage dynamic form" link, and at the bottom right are three buttons: "Add Block", "Import from dynaform...", and "Import from module...".

Figure 1

## CONDITIONAL FIELDS (ON FORM)

Allows you to set up conditional field rules applicable to the instances of the forms involved in the process (Figure 2).

These rules will be valid only during the duration of the process, in fact once it is finished they will be automatically deactivated.

BPMN-UserTask: Advanced

Task\_1jpioqq

Back

Conditionals

No rules configured

New Rule

Conditionals on dynamic form (not supported in Portal mode)

No rules configured

New Rule

Advanced permissions

Entity --Please select--

Participant User

admin@vtenext.com (User)

Permissions Read/Write

Add Rule

Figure 2

To proceed with the creation of a rule, you will have to click the “New Rule” button. The system will ask you to enter a text description by filling in the “Rule” field. You will then have to select the instance involved in the process, indicate any Roles or Groups to which to limit the application of the rule, enter a condition (which must occur for the rule to be activated) and finally enter the permissions on the fields involved (Figure 3).

For further information on the configuration of conditional fields, consult section 17.4 of the Vtenext general manual.

BPMN-UserTask > Editing

Task\_1jpioqq

Save Cancel

Rule Hide Account rating Field

Entity \$30] Accounts (BPMN-Task: )

2. Criteria --no conditions--

Conditions

New Group

Type equals Reseller And

Type equals Partner

New Condition

|                     | Value                    | Managed                             | Can read                 | Can write                | Mandatory                |
|---------------------|--------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|
| Account Information |                          |                                     |                          |                          |                          |
| Account Name        | <input type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Account No          | <input type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Rating              | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Website             | <input type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Figure 3

NOTE: compared to the standard conditional fields, an additional column called “Value” is available from the process, which allows you to force the insertion of static or dynamic data within the selected fields (Figure 4).

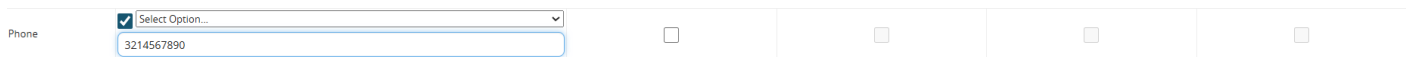


Figure 4

**CONDITIONAL FIELDS ON DYNAMIC FORM (NOT SUPPORTED IN PORTAL MODE)**

Allows you to set conditional field rules applicable to the fields of a specific dynamic form present within the process (Figure 5).  
These rules will be valid only during the duration of the process, in fact once it is finished they will be automatically deactivated.

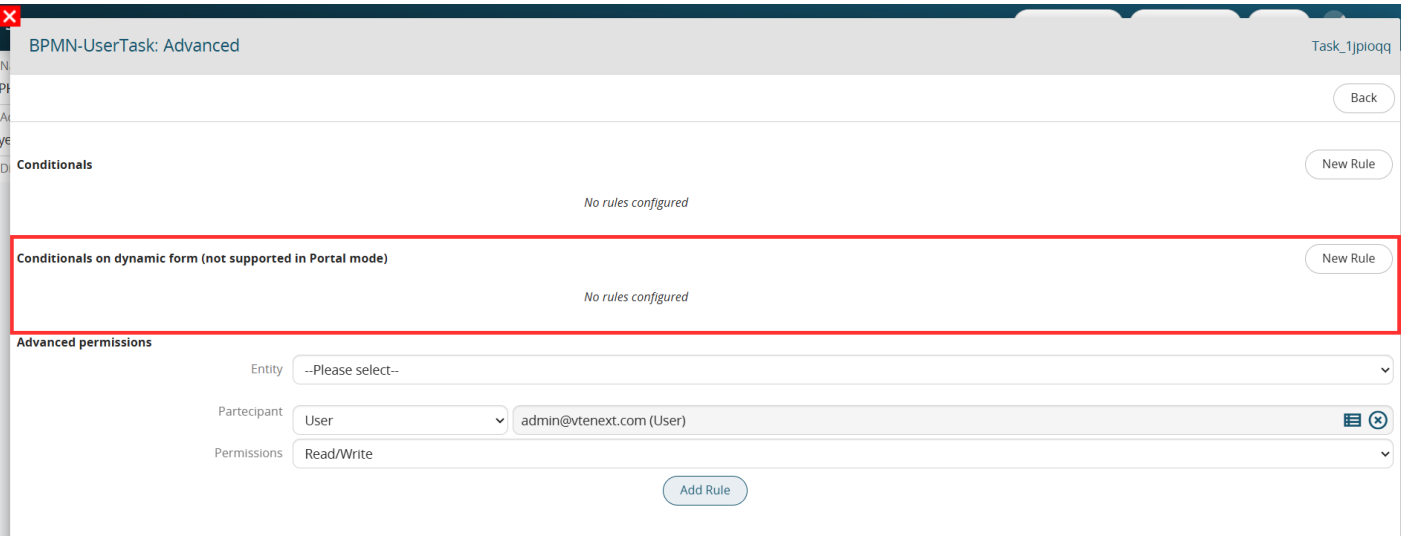


Figure 5

To proceed with the creation of a rule, you will have to click the “New Rule” button. The system will ask you to enter a text description by filling in the “Rule” field. You will then have to indicate any Roles or Groups to which you want to limit the application of the rule, insert a condition (which must occur for the rule to be activated) and finally insert the permissions on the fields involved.

For further information on the configuration of conditional fields, consult section 17.4 of the Vtenext general manual.

To better understand how it works, below is an example of a Process Helper aimed at requesting the approval of an internal flow by filling in a single field called “Action” (Figure 6).

**BPMN-UserTask** Task\_0g7kou0

Save Cancel Advanced...

**Actions**

No actions configured

☒ **Process Helper**

Assigned To User admin@vtenext.com (User) Related to \$30-crmid Select Option...

Status Pick list Values Running Process Name Select Option...

Requested action Select Option... Show in the related entity 2-Factor Authentication Show documents of the related entity

Fill the form to proceed with the flow.

**Manage dynamic form** Add Block Import from dynaform... Import from module...

**Information**

| Action | Reason for non-approval |
|--------|-------------------------|
|        |                         |

Figure 6

This is a picklist type field with the following 3 static values: “empty”, “APPROVATE” and “DO NOT APPROVE” and with mandatory permissions as Default (Figure 7)

**Field properties**

Select the properties to change for this field

**Label:** Action

**Permissions** Read/Write

**Mandatory Field** ☐

**Values mode** Specify the values

Pick list Values:

Approve  
Not approve

Default Value Select Option...

Save Cancel

Figure 7

There is an additional field called “Reason for non-approval” that should be shown and filled in only if the user chooses the “DO NOT APPROVE” option.

For this reason, the following conditional field rule on dynamic form has been created that allows you to hide the aforementioned field if the “Action” field has a value other than “DO NOT APPROVE”.

Therefore, in the “Advanced” → “Conditional fields on dynamic form” section, a rule called “If Action other than DO NOT APPROVE hide Reason for non-approval field” has been inserted (Figure 8).

Rule

If Action is different from Not approve hide Reason for non-approval field

Figure 8

In the “Condition” section, the “Action” condition other than “DO NOT APPROVE” has been inserted (Figure 9)

Conditions

New Group

Action

not equal to

Not approve

New Condition

Figure 9

In the “Fields to manage” section, only the “Managed” column was selected in the “Reason for non-approval” field (Figure 10)

| 4. Field to manage      |                          |                                     |                          |                          |                          |
|-------------------------|--------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|
|                         | Value                    | Managed                             | Can read                 | Can write                | Mandatory                |
| Information             |                          | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Action                  | <input type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Reason for non-approval | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Figure 10

ADVANCED PERMISSIONS

Allows you to set complete visibility permissions on the instances of the modules involved in the process by specifying a user or a group (static or dynamic).

N.B: They will be valid even after the end of the process.

To proceed with the insertion of an advanced permission you will have to select an instance involved in the process, a user or group (static or dynamic) to apply it to and finally one of the available permissions (“Read/Write” and “Read Only”) (Figure 11).

Once you click the “Add Rule” button, the advanced permission will be saved and confirmed.

Advanced permissions

Entity

[\$30] Accounts (BPMN-Task: Initial condition)

Participant

User

admin@vtenext.com (User)

Permissions

Read/Write

Add Rule

Figure 11

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