

6.1 Example of using Process Helper for internal user data requests – standard version

As anticipated in the introductory chapter, one of the most common uses of the process helper concerns the creation of customized forms that can be presented to internal users of the CRM in order to request and save information.

The blocks and fields that make up these forms are called "dynamic forms".

PREMISE: In order for a user to be able to view and fill out a dynamic form, he/she must have enabled the appropriate permissions on the profile side (Figure 1)

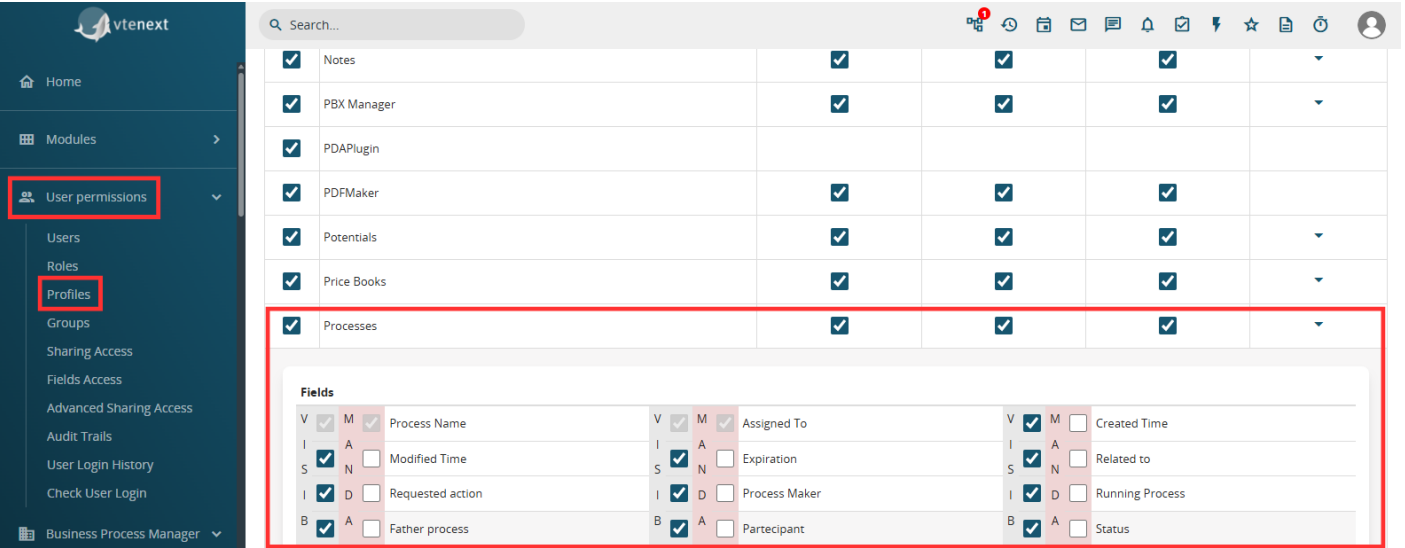


Figure 1

In order to configure a process helper, you must first configure an Action Task (create a link with a dedicated section) following the dedicated procedure (Figure 1).

NOTE: it is advisable to use the User Task symbol, as we are indicating an activity that will be charged to the user.

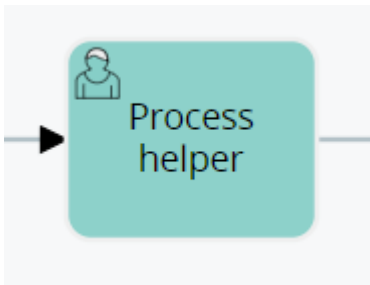


Figure 2

After the User Task, in this specific case it is essential to create a Task within which to perform some checks to allow the process to stop and present the dynamic form (Figure 2).

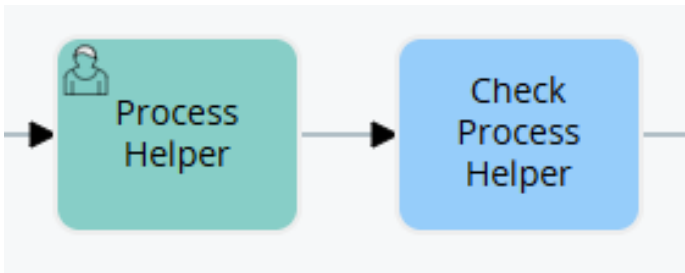


Figure 3

Once inside the User Task (in our example “Process Helper”) in configuration mode, we will find the section called “Process Helper” with all the related fields (Figure 3)

Figure 4

Once the main fields have been configured (Assigned to, Linked to, Action requested) we will create the necessary blocks and fields in the dynamic form in order to save the information that will be entered by the user (for more information on their configuration, see the chapter ...).

To better understand how it works, below is an example of a process helper aimed at requesting approval of an internal flow by filling in a single field called "Action" (Figure 4).

The screenshot shows a web application window titled "BPMN-UserTask: Process Helper". At the top right, there are buttons for "Save", "Cancel", and "Advanced...". Below the title bar, there is a section labeled "Actions" with the text "No actions configured". The main section is titled "Process Helper" and contains several fields: "Assigned To" (set to "User"), "Related to" (set to "\$30-crmid"), "Status" (set to "Running"), and "Requested action" (a dropdown menu). There are also checkboxes for "Show in the related entity" and "Show documents of the related entity". At the bottom, there is a "Manage dynamic form" section with buttons for "Add Block", "Import from dynaform...", and "Import from module...". Below that is an "Informations" section with a red asterisk next to the "Action" label.

Figure 5

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 5)

The screenshot shows a "Field properties" dialog box. It has a title bar with a red "X" button. The main content area is titled "Field properties" and contains the following fields: "Label:" (set to "Action"), "Permissions" (set to "Read/Write"), "Mandatory Field" (checked), and "Values mode" (set to "Specify the values"). Below these fields is a "Pick list Values:" section with a text area containing the values "Approve" and "Not approve". At the bottom, there is a "Default Value" section with a dropdown menu set to "Select Option...". At the bottom right, there are "Save" and "Cancel" buttons.

Figure 6

In the associated Control Task (called “Process Helper Control”) a condition is indicated that allows the process not to continue with its flow until a value other than blank has been entered (which instead represents the default value of the picklist) (Figure 6)

The screenshot shows the configuration window for a BPMN-Task named "Check Process Helper". The window has a title bar with "BPMN-Task: Check Process Helper" and a task ID "Task_1003mn5". There are "Save" and "Cancel" buttons in the top right. The "Entity" is set to "[SDF10] Form dinamica (BPMN-UserTask: Process Helper)". Under "When to run the check", the option "every time the condition is true" is selected. The "Conditions" section contains two groups of conditions, separated by an "or" operator. The first group has a condition where "Action" equals "Approve". The second group has a condition where "Action" equals "Not approve". Each condition group has a "New Condition" button and a trash icon.

Figure 7

The two conditions inserted in separate groups allow the flow to be routed in two different paths based on the item selected by the user.

On the operational side, the process helper presents itself with a preview mask as shown in Figure 7, this is because the “Show in the linked entity” flag has been activated.

The screenshot shows the user interface for the process helper. At the top, there is a search bar and a navigation bar with "Account Vtenext" and an "Edit" button. Below the navigation bar, there are tabs for "INFORMATIONS", "TABELLE TEST", "PROCESS GRAPH", "PROCESS HISTORY", and "HISTORY". The "INFORMATIONS" tab is active, showing a green banner with the text "Requested action: Manual process BPMN chapter 6.1". Below this, there is a message: "Your action is required to proceed: Please fill the form to proceed." with an "Edit" button. The "Account Information" section shows "Account Name" as "Vtenext" and "Account No" as "ACC15". On the right side, there are "SHORTCUTS" and "RELATIONS" sections. The "RELATIONS" section shows "Processes" and "Contacts" with a notification icon.

Figure 8

Alternatively, it will always remain visible and fillable in the section accessible via the dedicated button in the top-right menu (Figures 9 and 10).

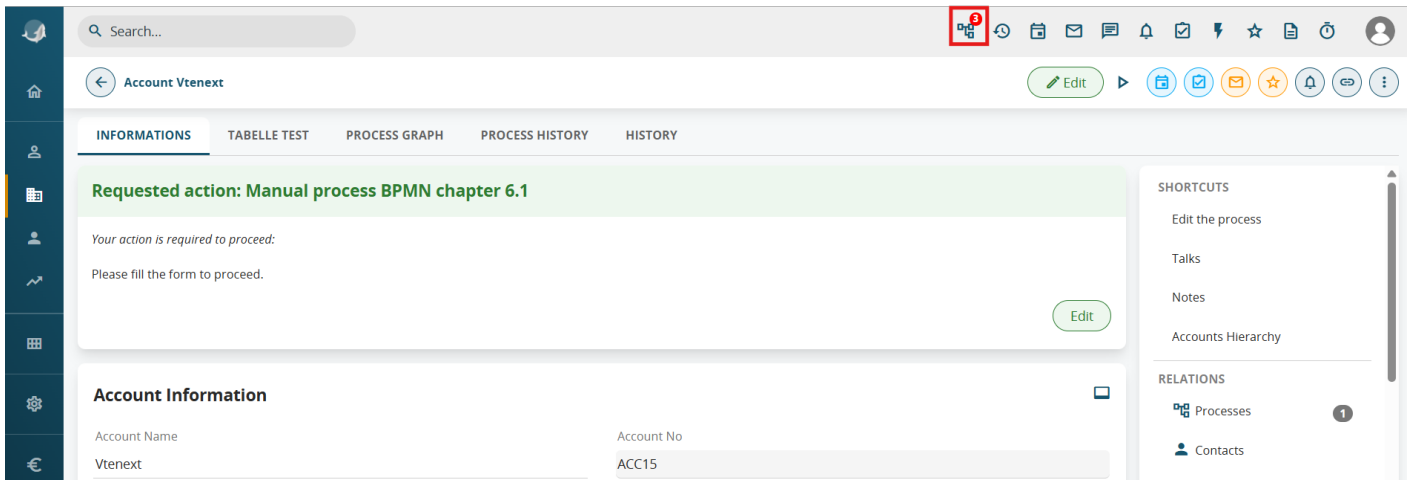


Figure 9

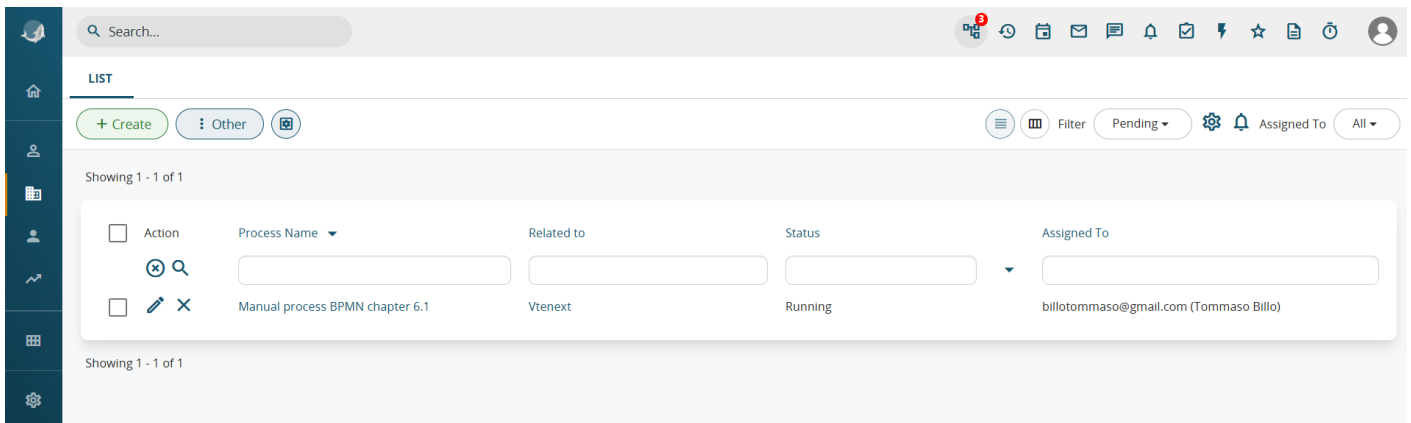


Figure 10

As of version 26.04, the preview display interface has been modified to correctly handle multiple dynamic forms active simultaneously on the same record. By default, they are displayed in "Slider" mode. (Figure 11)

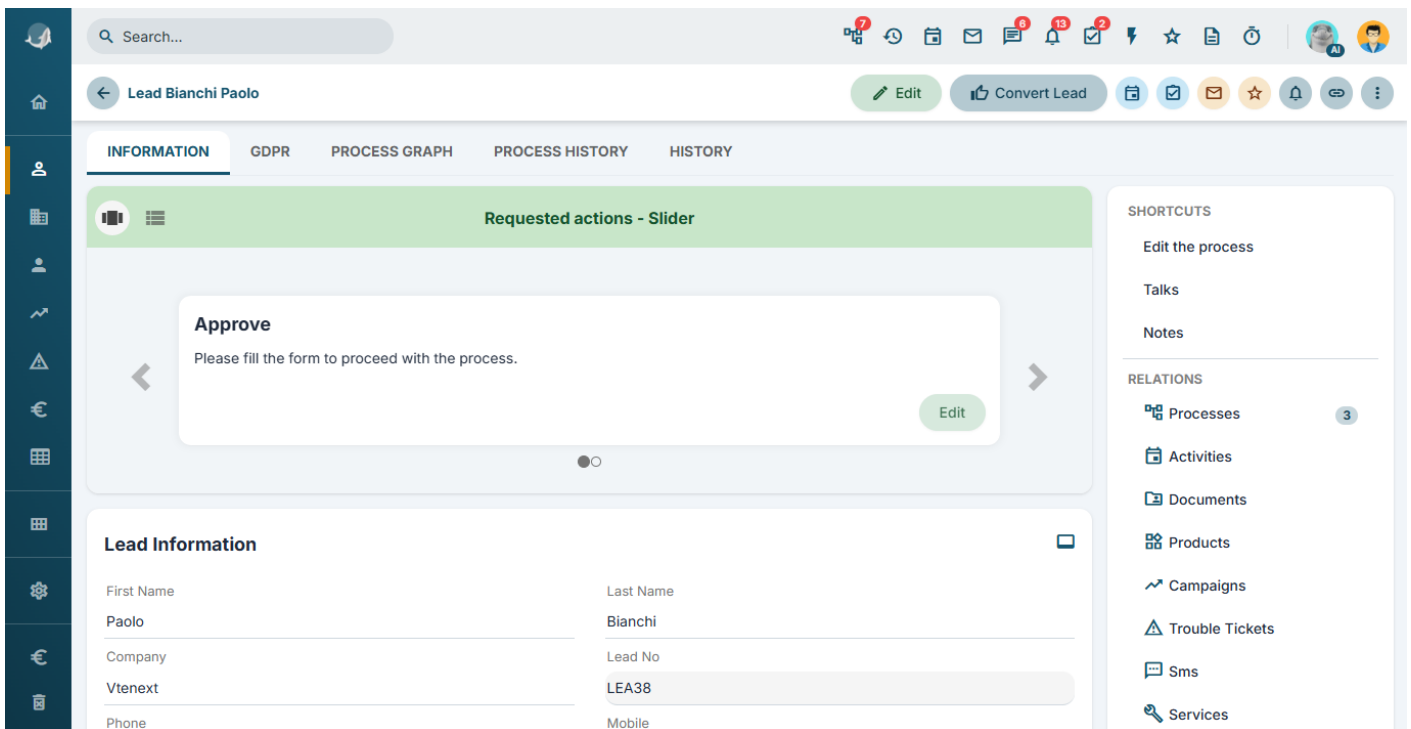


Figure 11

By pressing the dedicated button, they can be viewed in "scroll" mode. (Figure 12)

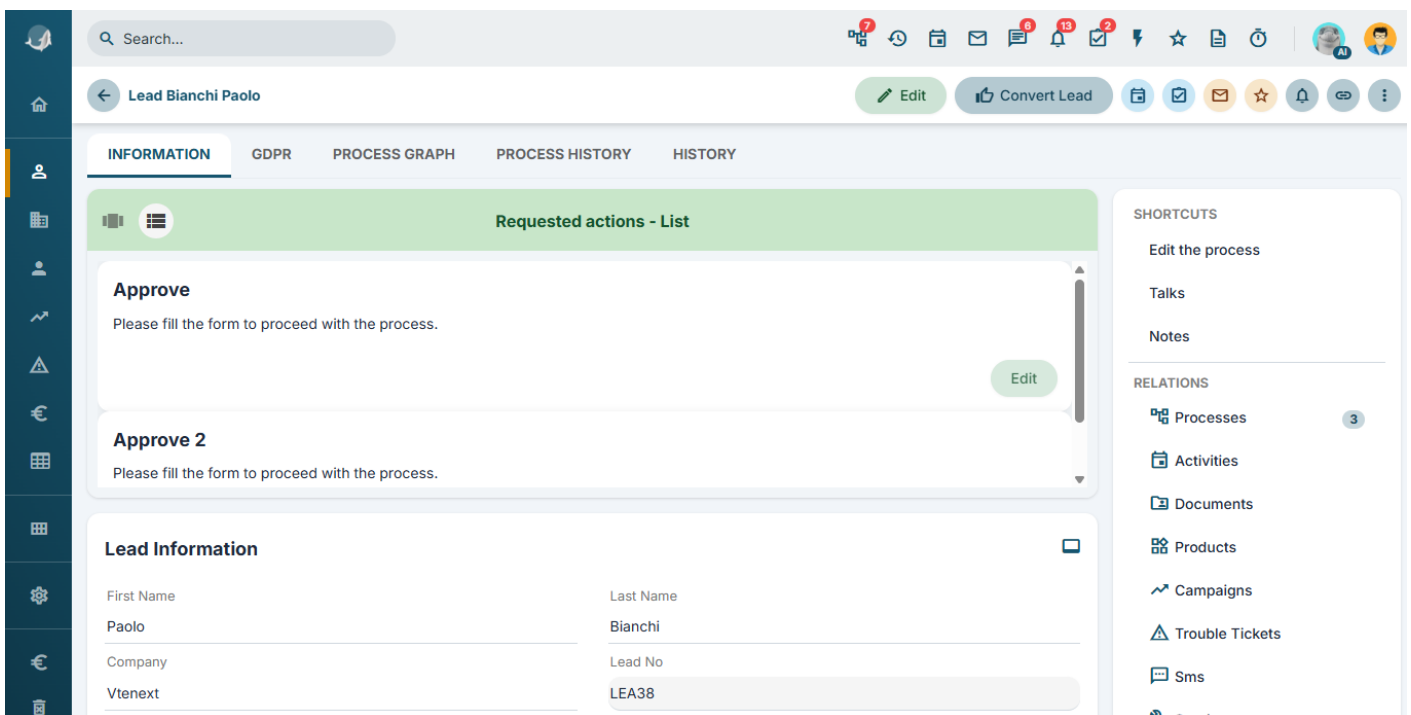


Figure 12

The section accessible via the dedicated button in the top-right menu has also been modified, making it visually more striking and comprehensive. (Figure 13)

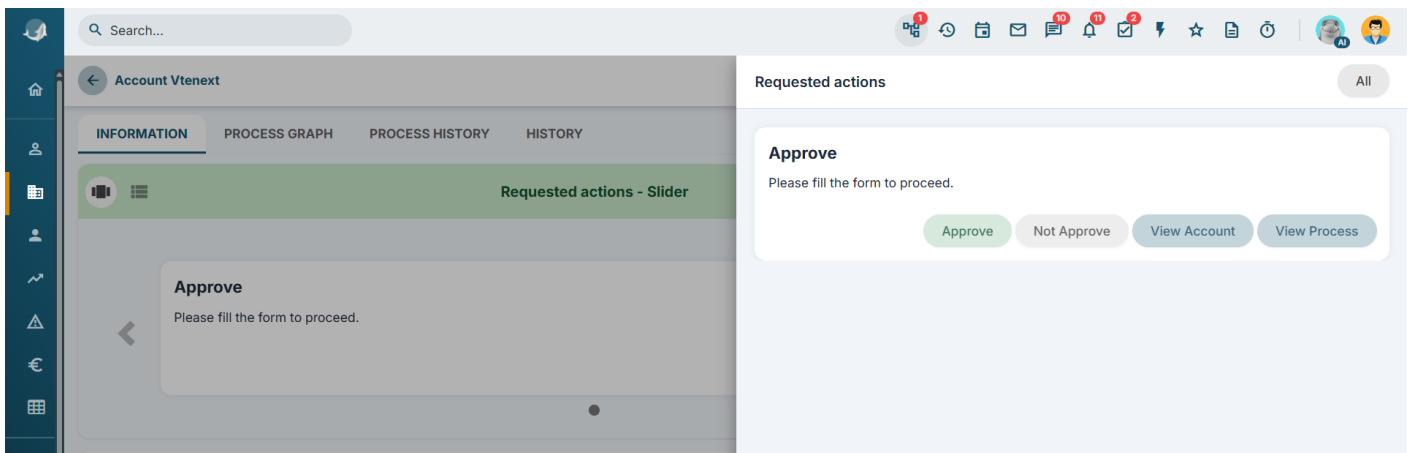


Figure 13

Clicking the "All" button redirects the user to the legacy process screen, which has nevertheless been improved in terms of both graphics and functionality.

Specifically, the following buttons have been added to the list:

- preview button: allows the content of the dynamic form to be viewed in the middle of the panel and enables the user to proceed with filling it out (Figure 14)
- direct fill button: allows the dynamic form to be opened directly as a pop-up (Figure 15)

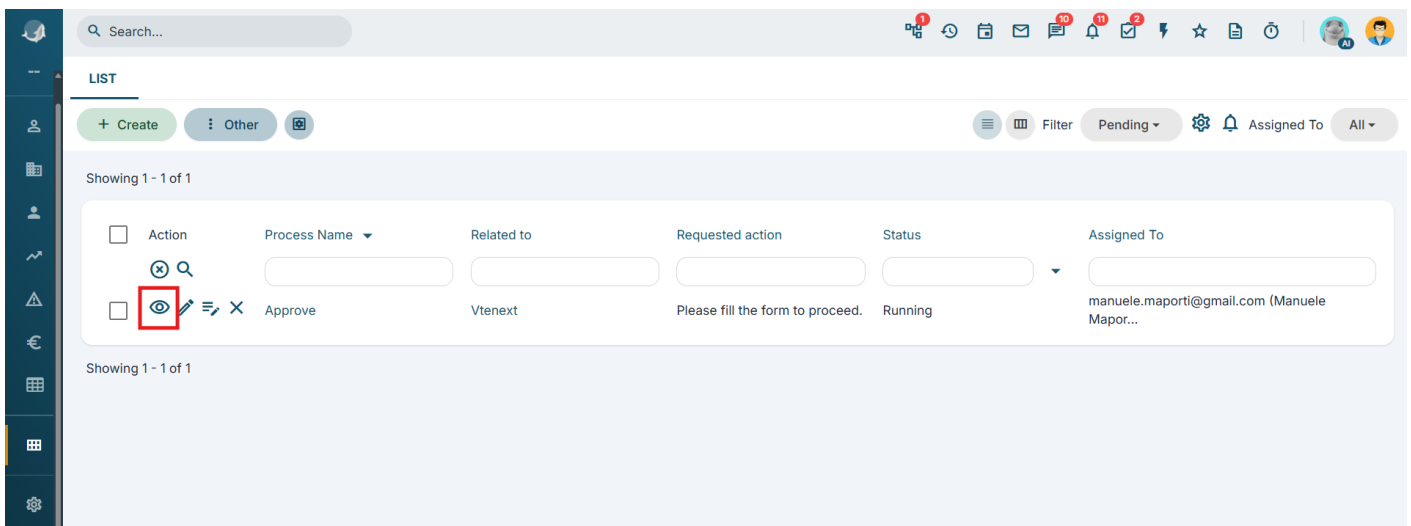


Figure 14

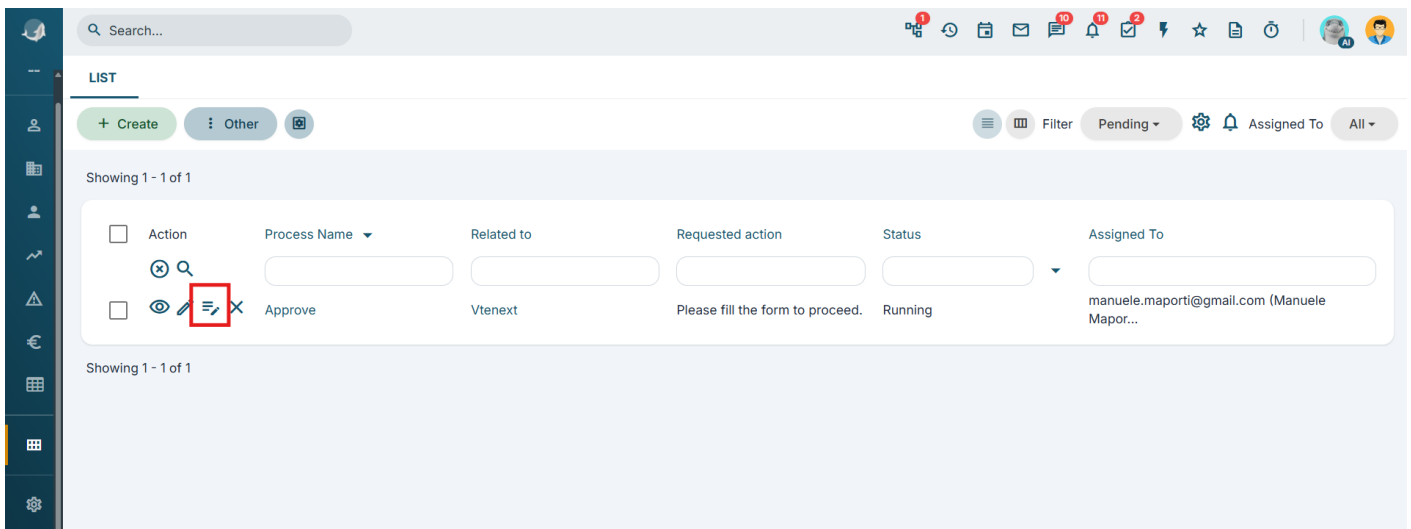


Figure 15

Clicking the "Fill" button displays a pop-up containing the dynamic form. The user simply needs to fill in the "Action" field and then click the "Save" button (Figure 16).

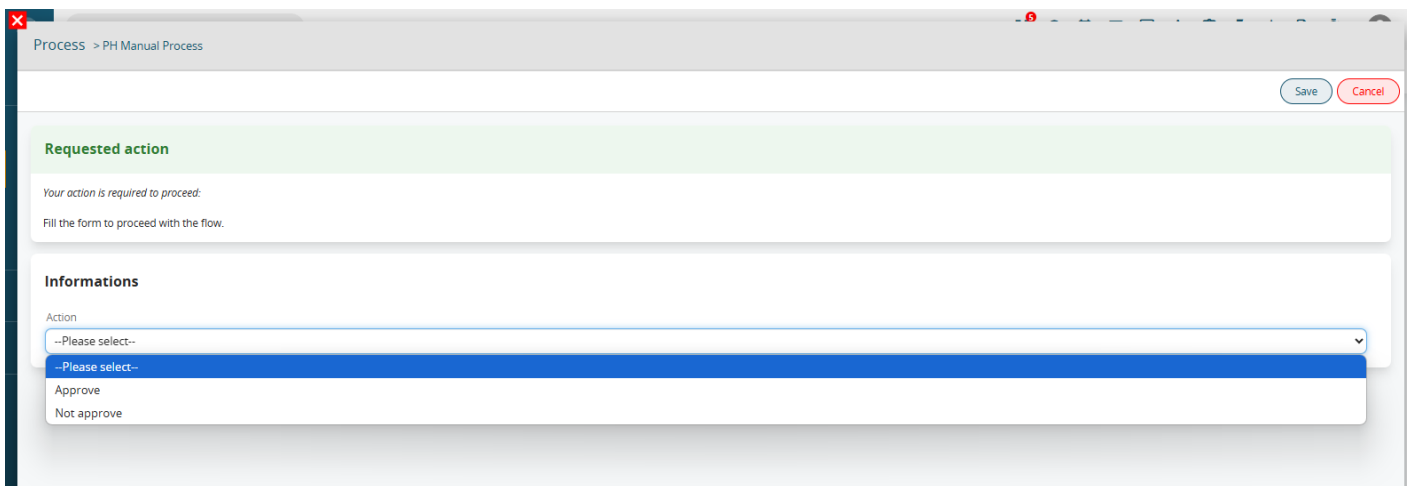


Figure 16

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