

6.3 Example of using Process Helper to request external user data

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

The blocks and fields that make up these masks are called “dynamic forms”.

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 carried out by the user.

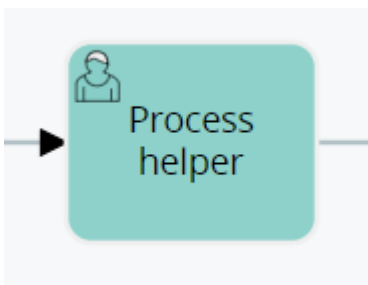


Figure 1

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).

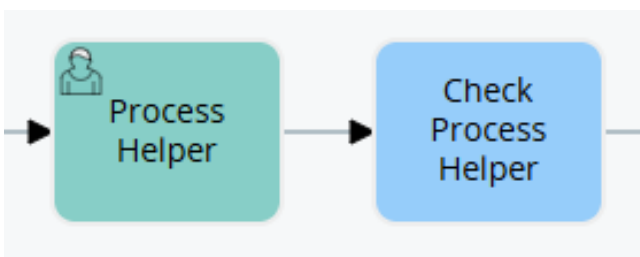


Figure 2

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 (see Figure 3)

BPMN-UserTask: Process Helper

Task_1jpioqq

Save Cancel Advanced...

New action

Actions

No actions configured

☒ **Process Helper**

Assigned To ⓘ

User admin@vtenext.com (User)

Status

Pick list Values Running

Requested action Select Option...

Related to Select Option...

\$30-crmid

☐ Process Name Select Option...

☒ Show in the related entity ☐ 2-Factor Authentication

☐ Show documents of the related entity

Manage dynamic form

Add Block Import from dynaform... Import from module...

Figure 3

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.

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

BPMN-UserTask: Process Helper

Task_1jpioqq

Save Cancel Advanced...

Assigned To ⓘ

Email \$30-email

Status

Pick list Values Running

Requested action Select Option...

Fill the form to proceed with the flow.

Related to Select Option...

\$30-crmid

☐ Process Name Select Option...

☒ Show in the related entity ☐ Show documents of the related entity

Email Subject Select Option...

Email Message Select Option...

Mail From Select Option...

Font Size B I U A- A+ [icons]

Your action is required to proceed.

The link will be valid until Select Option...

Now 30 days Calendar days

Request confirmation by email ☐

Manage dynamic form

Add Block Import from dynaform... Import from module...

Informations

Action

Figure 4

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 with a red close button in the top left. The dialog is titled 'Field properties' and contains the following sections:

- Select the properties to change for this field**
- Label:** A text input field containing 'Action'.
- Permissions:** A dropdown menu showing 'Read/Write'.
- Mandatory Field:** A checkbox that is checked.
- Values mode:** A dropdown menu showing 'Specify the values'.
- Pick list Values:** A text area containing 'Approve' and 'Not approve'.
- Default Value:** A text input field with a dropdown menu showing 'Select Option...'.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom right.

Figure 5

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 a 'BPMN-Task: Check Process Helper' configuration window. The window has a title bar with 'BPMN-Task: Check Process Helper' and 'Task_1o03mn5'. The main content area is divided into several sections:

- Entity:** A dropdown menu showing '[SDF10] Form dinamica (BPMN-UserTask: Process Helper)'.
- When to run the check:** Two radio buttons: 'on change' (unselected) and 'every time the condition is true' (selected).
- Conditions:** A section with two conditions. Each condition consists of a dropdown menu showing 'Action', a dropdown menu showing 'equals', and a dropdown menu showing 'Approve' (for the first condition) and 'Not approve' (for the second condition). There are also 'New Condition' buttons and a 'New Group' button.
- Buttons:** 'Save' and 'Cancel' buttons at the top right.

Figure 6

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, an email is sent to the address entered in the “Assigned to” field that has a button called “CLICK HERE” (Figure 7)

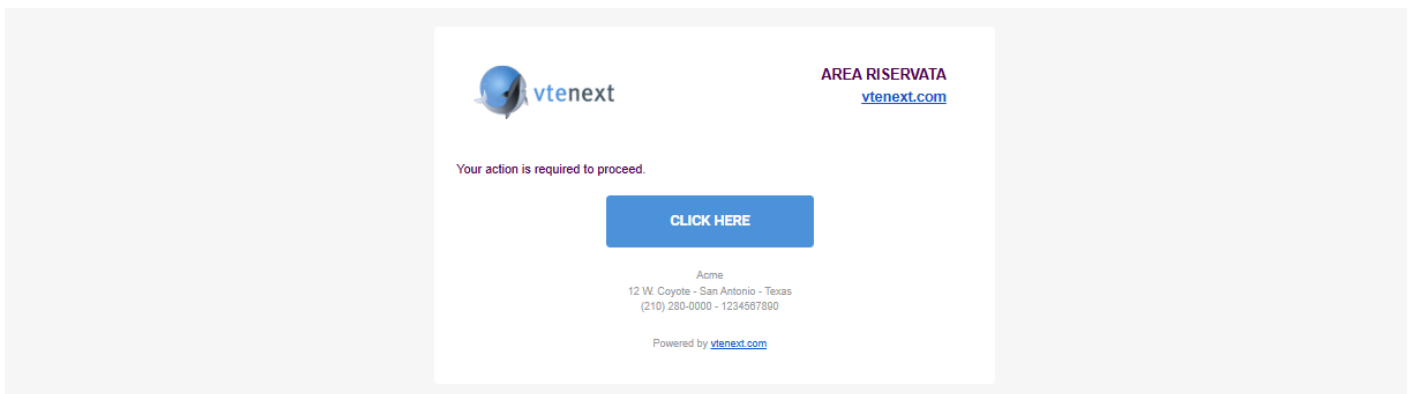


Figure 7

Clicking the button opens a landing page with the content of the dynamic form.

The user simply has to fill in the “Action” field and finally click on the “SEND” button (Figure 8)

Figure 8

Once saved, a warning message will be displayed on the landing page to indicate that the operation was performed correctly (Figure 9)

Data entry form



Operation completed successfully

Close

Figure 9

Revision #4

Created 2025-05-23 13:14:24 UTC by Riccardo

Updated 2026-07-14 12:32:59 UTC by Tommaso