***Process Definition***

***Process Definition*** *-*

Process engine lets users define a process flow as a sequential set of steps that are executed in real time one after the other. Each step in the process is called a process task

**Process Master:**

Users can create new processes using the "New" button in the Process Listing

* **Process Name -** The user may choose any Process name according to their preference
* **Process Owner -**If the next-level user is unavailable, the task will move to the Process Owner.
* **Amendment -**When enabled, amendments replace the PEG process for the same tasks. If amendment confirmation is required, a large text field will appear for users to input a confirmation message
* **Is amendment confirmation required? -** If this option is enabled, a large text field (Amendment confirmation message”) will appear for the user to enter their own confirmation message.

**Process Listing:**

Displays created processes and allows users to add new processes or navigate to the PEG Notification page. Tasks can be created by selecting a process, with existing tasks shown under the "Details" column.

**Make Task:**

On clicking the process name, it will open the Process Definition-Make, which is used to initiate the PEG process by creating a record in Tstruct

***Task Definition:***

* **Form -** Here, it will list all Tstructs in the application, allowing the user to select a specific Tstruct for Process Definition
* **KeyField-**Name of the field that is used to searched for a data in the tstruct(Primary)
* **Display Group Name-**Naming the list of tasks
* **Display Task Name-** Unique Name for Task
* **IndexNo-**A number that identifies the order in which this task will be executed in this process.
* **Condition-**Table field, user can specify conditions for initiating the Make process (User can also add multiple conditions using ‘And/OR’)

Note: Conditions can specify based on Fields and Global params

* **Active -**Enable the task to be active
* **Is Optional? -**It will be applicable from the 2nd Make level to skip the current Make task
* **Multiple Make -> Assign To - Prior to-** Using this, we can Save record with same User

***Display in Task Listing:***

* **DisplayIcon**
* **DisplayTitle-**Given Content will display in Active List and it can contain dynamic values (ex -:fieldname)
* **Displayadditional content-**Given Content will display in Active List and it can contain dynamic values (ex - :fieldname)
* **DisplayContent-**Can contain field tags and :fieldname. A field from this transid can be referred by naming the inline field as transid.fieldname

***Settings:***

* **Task Params -**It will list all fields of selected Tstruct, and selected fields we can use in If/elseif conditions
* **Task description - NA**

**Check/Approve Task:**

***Approval Details:***

* **AssignTo-**
  + *Reporting Manager-* It will assign to the reporting manager, based on the ReportingTo value from axusers for that specific user level.
* *From Form Field-* Allows the user to select a field (which refers to a username) from the corresponding tstruct and assign task
* *Skip level -* It will assign to the reporting manager’s manager (i.e., one level above the reporting manager).
* *Actor-* Task will assign to users associated with the selected actor
* **Allow user to Send to -**It is user to Forward task from one user to another based on selected value “
* *Any User*- In Runtime, it will list all users in that application (Or user can allow using User Groups)
* *Users in This process-* It Runtime, it will list only Users who are involved in that process
* *None -* This button will not show in runtime
* **Is return allowed-**If user Enable this toggle button, then Return option will show in Runtime
* **Group with prior-**If the user enables this toggle button, it will consider the entire group based on the 'Display Group Name' value, allowing the user to approve, check, or make tasks regardless of the index number
* **Auto approve for orphan records-**If the next-level user is not there, then that record will auto approve
* **Allow initiator to approve-**If the user enables this toggle button, and the initiator and the Approve/Check level are the same user, it will allow the initiator to approve that level; otherwise, else it will not consider that user.
* **Consider only business dates for Escalations/Reminders -**If user enables this toggle button, Escalations/Reminders will trigger on Business dates
* **Auto approve-**If user Enable this toggle button, task will be Approved without manual actions
* **Display action buttons-**If user disable this toggle button, Actions for Approval/check level will be hidden in runtime Process Page
* **Approve and Forward To-Enable the "Approve and Forward To" functionality in the approval workflow.**
* During the approval stage, users can select the level to which they want to forward the task.
* This allows skipping intermediate levels if necessary.
* The list of upcoming levels (from the current level onward) will be fetched using a database function, and displayed in a dropdown.
* The user can then approve and forward the task to any of the available next levels.

### **Return to Any Prior Task-**Enable the "Return to Any Prior Task" functionality in the return workflow.

* When enabled, users can return a task to any previously processed level, including:
  + Prior index levels
  + The initiator
* The list of prior-level tasks will be generated using a database view (as assumed).
* This provides flexibility in returning tasks to the most appropriate earlier stage for reprocessing or correction.

***Form Controls:***

* **Set Value to Field -**User can Set value to any field
* **Enable -**Comma separated list of fields from the associated form that can be allowed to be edited.

***Remainders :***

It is used to trigger Notifications to Remind the Task through Mail

* **Start From -**Reminder form will be added in the grid area. This field can be the Date of notification, Date of initiation, date fields from the form, or specific global variables  
  Note - "start from" fields need to be added to the taskparams.
* **When-**user can select whether the reminder will trigger before or after the selected date.
* **Mail Days-**user can specify the period during which this Reminder will remain active(Mention in days)
* **Reminder mail for every Nth day-**User can define when the reminder will trigger for every Nth day (ex - for every 2 days remainder should trigger, for that user can define 2 in that field)
* **Days based on -**Mail for every Nth day should count based on Business days or Working days
* **Reminder templates-**User can select Template to send as Remainder  
  Note - templates will list form PEG Notification

***Escalation:***

It is used to trigger Notifications to Escalate the Task through Mail

* **Start From-**Escalation form will be added in the grid area. This field can be the Date of notification, Date of initiation, date fields from the form, or specific global variables  
  Note - "start from" fields need to be added to the task params.
* **When -**user can select whether the Escalation will trigger before or after the selected date.
* **Mail Days -**user can specify the period during which this Escalation will remain active(Mention in days)
* **Escalation mail for every Nth day -**User can define when the Escalation will trigger for every Nth day (ex - for every 2 days Escalation should trigger, for that user can define 2 in that field)
* **Days based on -**Mail for every Nth day should count based on Business days or Working days
* **Escalation to-** Based on Selected Value It will escalate to the user
* Auto Approve
* Auto Reject
* Actor
* Process Owner
* Reporting Manager
* Skip Level
* Initiator Reporting Manager
* **Escalation to actor -**If user selects Actor in Escalate To field, then Available actors will be listed in this dropdown
* **Escalation Templates -**User can select Template to send as Escalation  
  Note - templates will list form PEG Notification
* **Notify To-**Based on Selected value Notification will be sent
* Reporting Manager
* Actor
* Process Owner
* Skip Level
* **Notify Template -**If user select Actor in Notify To field, then Available actors will list in this dropdown

***Settings:***

* **Task Params -**It will list all fields of selected Tstruct, and selected fields we can use in Remainders and Escalations
* **Allow to edit prior forms-**If this is enabled, editable tasks will be displayed. It will list the defined 'Make' levels, and if any 'Make' is selected, that record will be enabled for the user to edit

***Approval Comments:***

Here, the user can define settings for Approve/Return/Reject actions, such as making comments mandatory, specifying comment reasons, and setting default comment text

***Notifications:***

Here, the user can select notification templates for Approve, Reject, Return, and Make from PEG Notifications

***Confirmation Message:***

User can give Confirmation message for Approve/Return/Reject actions

***Amendment:***

### **Amendment Flow Configuration in Process Master, Introduce a checkbox labeled "Amendment Flow" in the Process Master. When Amendment checkbox is selected, the Amendment Process will be enabled for that process.**

### **Is Amendment Confirmation Required?**

* If the user enables this checkbox, an **Amendment Confirmation Message** field will be displayed.
* The user can enter a custom confirmation message.
* This message will be shown when the user modifies an existing record in the corresponding tstruct.

**Note:**  
The **Amendment Process** is similar to the **PEG Process**.  
The key difference is that the Amendment Process is triggered **only when the user edits an existing record** in the tstruct.

**Additional Scenario’s:**

For the same form (tstruct), the user can initiate both **PEG** and **Amendment** processes.

* When a **new record** is created for the form, the **PEG process** will be initiated.
* The **Amendment process** will start when the record is **Withdrawn**, **Discarded**, or **Returned** from the **Approve/Check** level.
* Once the Amendment process is completed, the **PEG process will resume** from where it was disconnected.

***PEG Notifications:***

PEG notifications are used to inform specified users when a task is **Created**, **Approved**, **Rejected**, or **Returned**. This enhancement introduces support for **email-based approvals**, allowing users to approve tasks directly from within the email notification itself.

***PEG Notification***

* **Name –** The user may choose any name according to their preference
* **Process –** It will list all the available Process definitions, and user can select required Process for Notifications
* **Task –** This section displays all tasks associated with the selected process
* **Notify To –** Based on the selected value, notifications will be sent accordingly:
  + Initiator – Sends notification to the user who initiated the task (Make).
  + Sender – Sends notification to the user assigned to the task.
  + Reporting Manager – Sends notification to the reporting manager, based on the ReportingTo value from axusers for that specific user level.
  + Skip Level – Sends notification to the reporting manager’s manager (i.e., one level above the reporting manager).
  + From Field – Allows the user to select a field (which refers to a username) from the corresponding tstruct.
  + Process Owner – Sends notification to the role defined as the process owner in the Process Master definition.
  + All Users in This Process – Sends notification to all users involved in the selected process.
  + Task Params – Sends notification to the user specified in the selected field within task parameters.
  + Task List – If you select "Task List", it will display the list of tasks that occur prior to the current task. When you select a task name from this list, the notification will be sent to the user associated with that selected task.
  + Role – Sends notification to users associated with the selected role.
  + Actors – Sends notification to users associated with the selected actor.
  + Others – Allows manual entry of email IDs. For multiple email addresses, use a comma (,) as a separator.
* **Enable Email –** Select "Enable Email" as "Yes" to send notifications via email. Once this option is enabled, the Email, Email CC and Email BCC DC will automatically become visible for configuration.

***Email***

* **Email Subject –** The user has the privilege to define their own email subject.
* **Email Attachment –** Users have the option to attach files that are created using Fast Reports or Fast Prints, specifically for the selected tstruct.
* **Email Body –** The user has the privilege to define their own email body and user can use Data intellisence to get dynamic values in email.

**Note:** Data Intellisense can be used by typing a colon (:). This will list all fields from DC1 of the selected form, along with available application parameters.

***Email CC***

* **Notify to –** Same as Notify to Field from PEG Notification DC

***Email BCC***

* **Notify to –** Same as Notify to Field from PEG Notification DC
* **Enable SMS –** Select "Enable SMS" as "Yes" to send notifications via SMS. Once this option is enabled, the SMS DC will automatically become visible for configuration.
  + **SMS Text –** The user has the privilege to define their own SMS text and user can use Data intellisence to get dynamic values in SMS.

**Note:** Data Intellisense can be used by typing a colon (:). This will list all fields from DC1 of the selected form, along with available application parameters.

* **Enable Whatsapp –** Select "Enable Whatsapp" as "Yes" to send notifications via SMS. Once this option is enabled, the Whatsapp DC will automatically become visible for configuration.
  + **Whatsapp Text –** The user has the privilege to define their own Whatsapp text and user can use Data intellisence to get dynamic values in Whatsapp.
* **Mobile Notification –** Select "Enable Mobile Notification" as "Yes" to send notifications via SMS. Once this option is enabled, the Mobile Notification DC will automatically become visible for configuration.
  + **Title –** The user has the privilege to define their own Notification title
  + **Content –** The user has the privilege to define their own Mobile Notification text and user can use Data intellisence to get dynamic values in Mobile Notification.