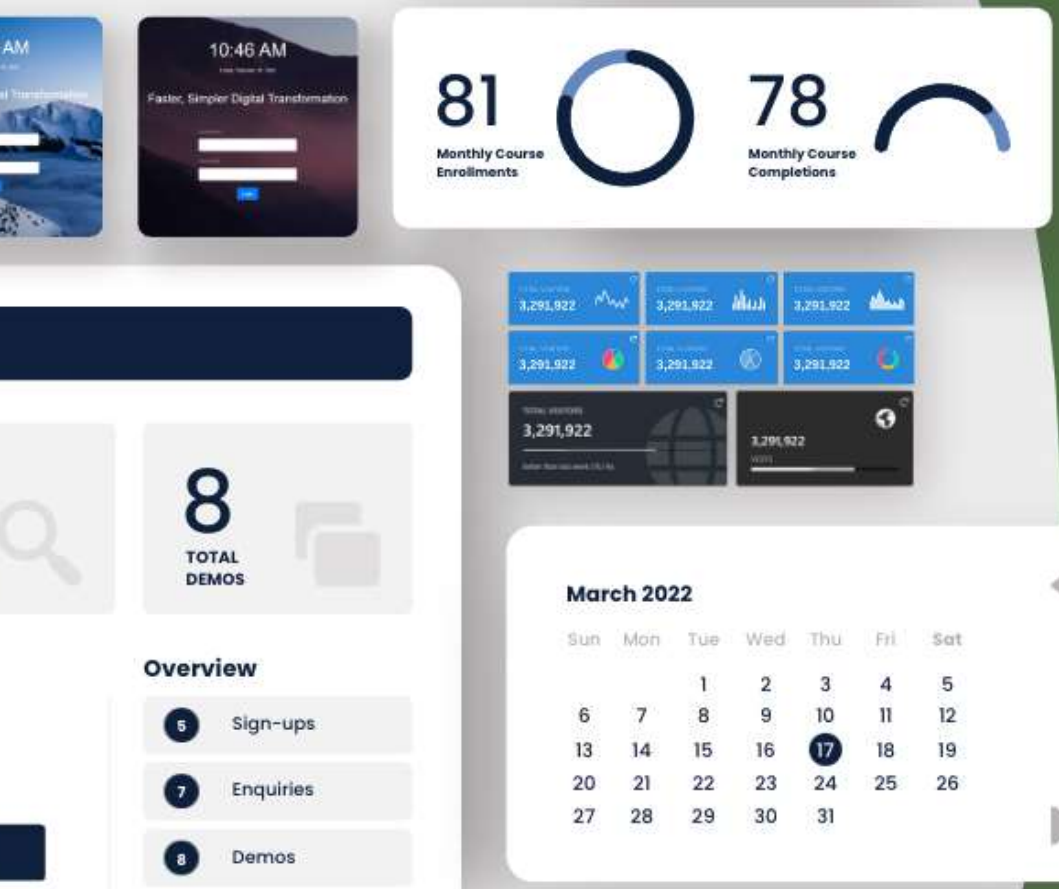


Joget DX 8

Designing your first Form

http://facebook.com/jogetworkflow
http://twitter.com/jogetworkflow

Last Revised on March 2024

Joget

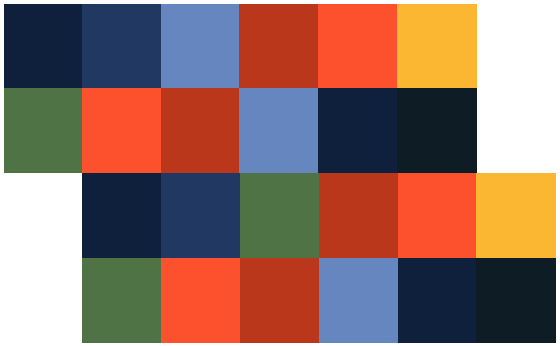
Prerequisites

1. Appreciates the use of a form
2. Understanding on ER diagram is highly recommended
3. Created a Process

Joget

Content

1. Introduction to Form Builder
2. Designing your First Forms
3. Controlling Process by using Form



Chapter 1

Introduction to Form Builder

Joget

Apps

Progressive Web Apps
Various Form Factors

Customer Onboarding | Supplier Portal | Loan Application | Service Request Portal

Joget Marketplace

Development

Simple, Visual, Drag and Drop.

Joget

Form Builder | List Builder | UI Builder | Process Builder

Add-on Builders

Plugin Architecture

Integration API

API JSON
API Java
API JavaScript

User Management
- Organizations
- Groups
- Users

Monitoring
- Processes
- Application Performance
- Logging & Audit

System
- Workflow Engine
- Security and Directory
- Plugin Management

Governance

Platform

Open, Flexible and Extensible.

Infrastructure

On-Premise, Containers, Private / Public / Hybrid Cloud. App Server, DB, OS Independent.

Application Server: WebSphere, JBoss, WildFly, ORACLE WEBLOGIC

Database: MySQL, ORACLE, PostgreSQL, SQL Server

Operating System: Linux, Windows

Containers and Cloud: OPENSHIFT, CLOUD FOUNDRY, docker, aws, Azure, Google Cloud Platform

Integration

Easy integration with various enterprise technologies.

slack, Google Maps, UiPath, IBM, kafka, ORACLE, HYPERLEDGER FABRIC, TensorFlow, salesforce, Microsoft, many more

Joget

Apps

Progressive Web Apps
Various Form Factors

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Supplier Portal

Loan Application

Service Request Portal

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Operating System

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Containers and Cloud

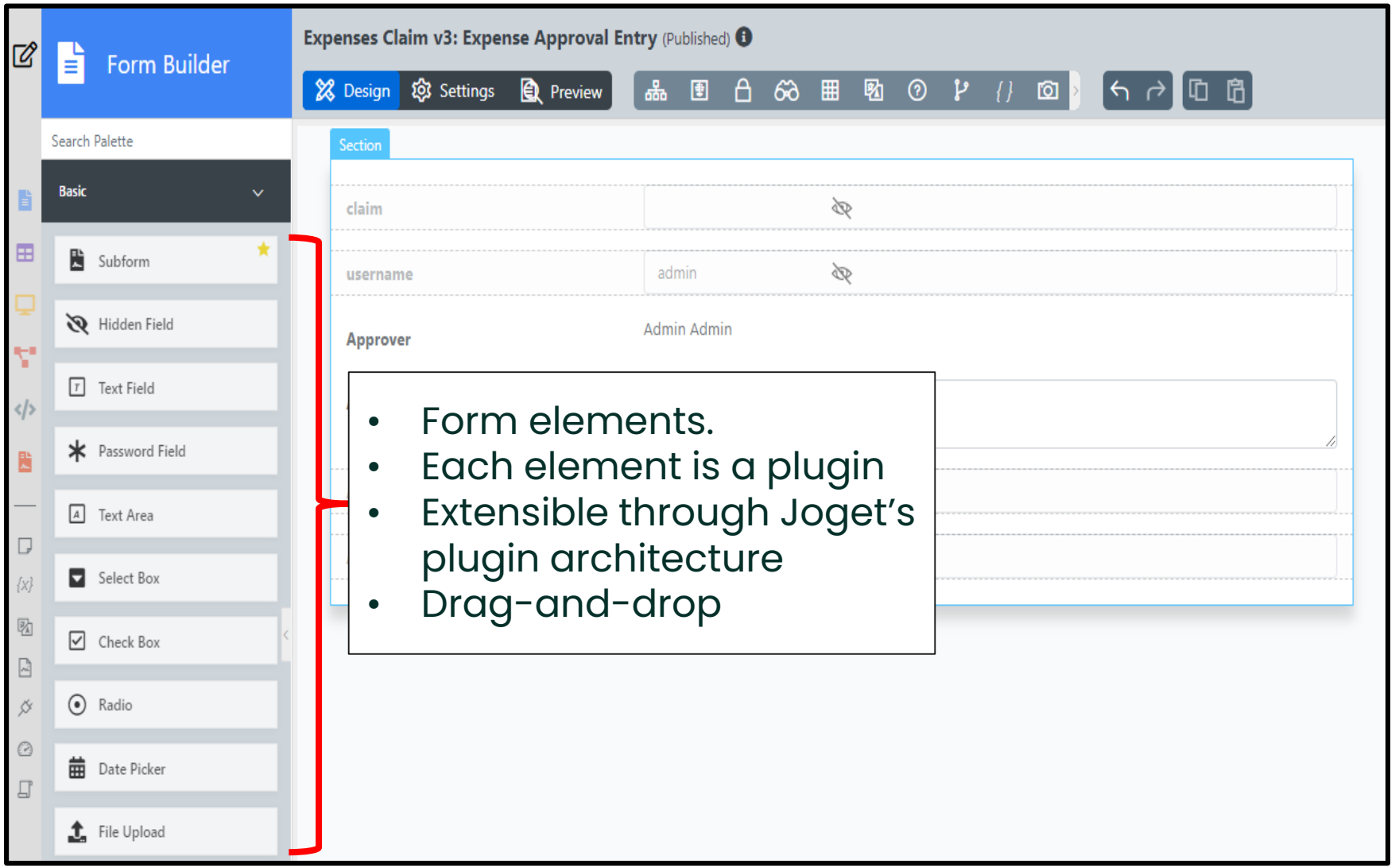
OPENSHIFT, CLOUDFOUNDRY, docker, aws, Azure, Google Cloud Platform

Joget

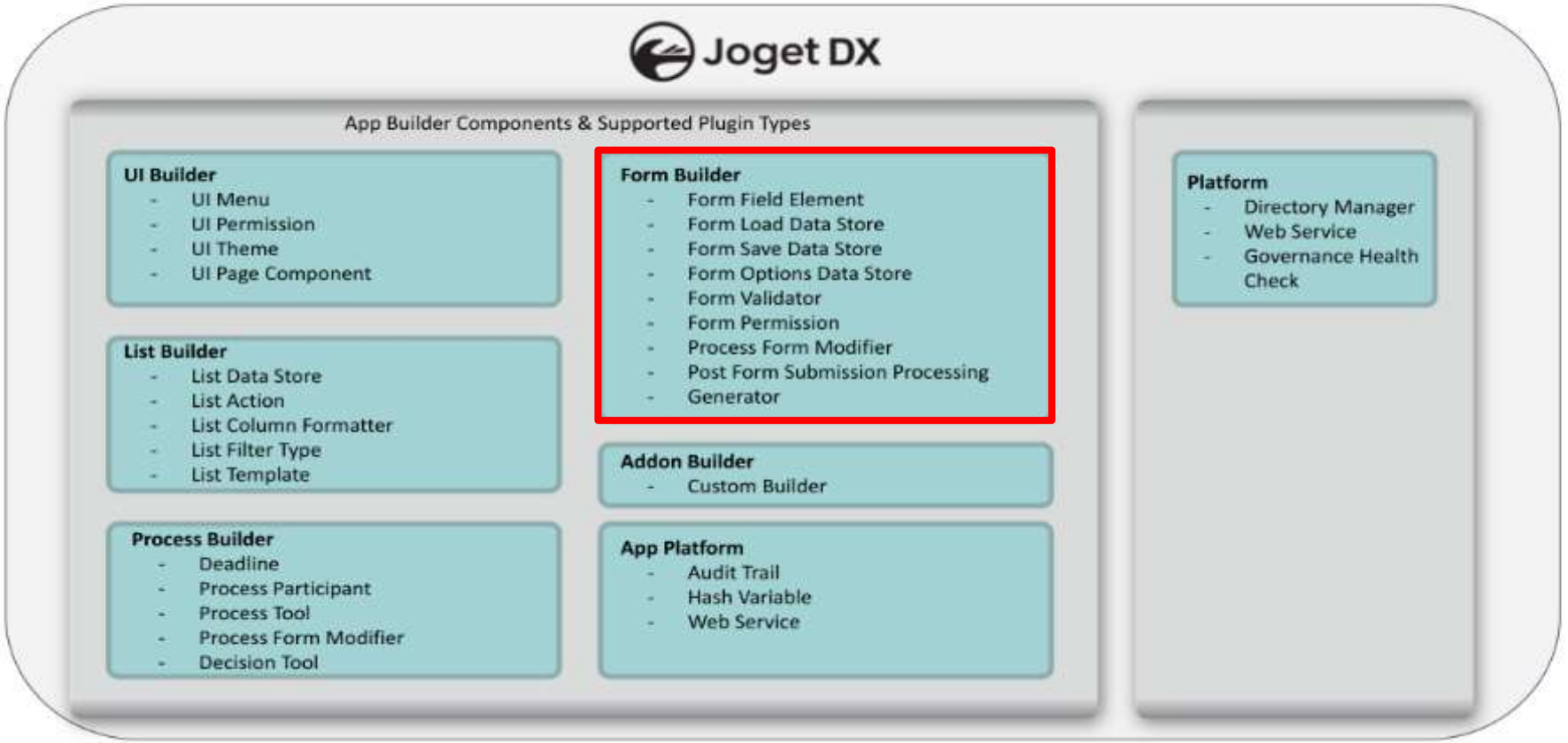
Form Builder

- Used as a mean to collect information/interact with the end user.
- Drag and drop, and configure based form builder.
- Little/No programming knowledge needed to operate.
- Extensible functionalities through Joget's plugin architecture.

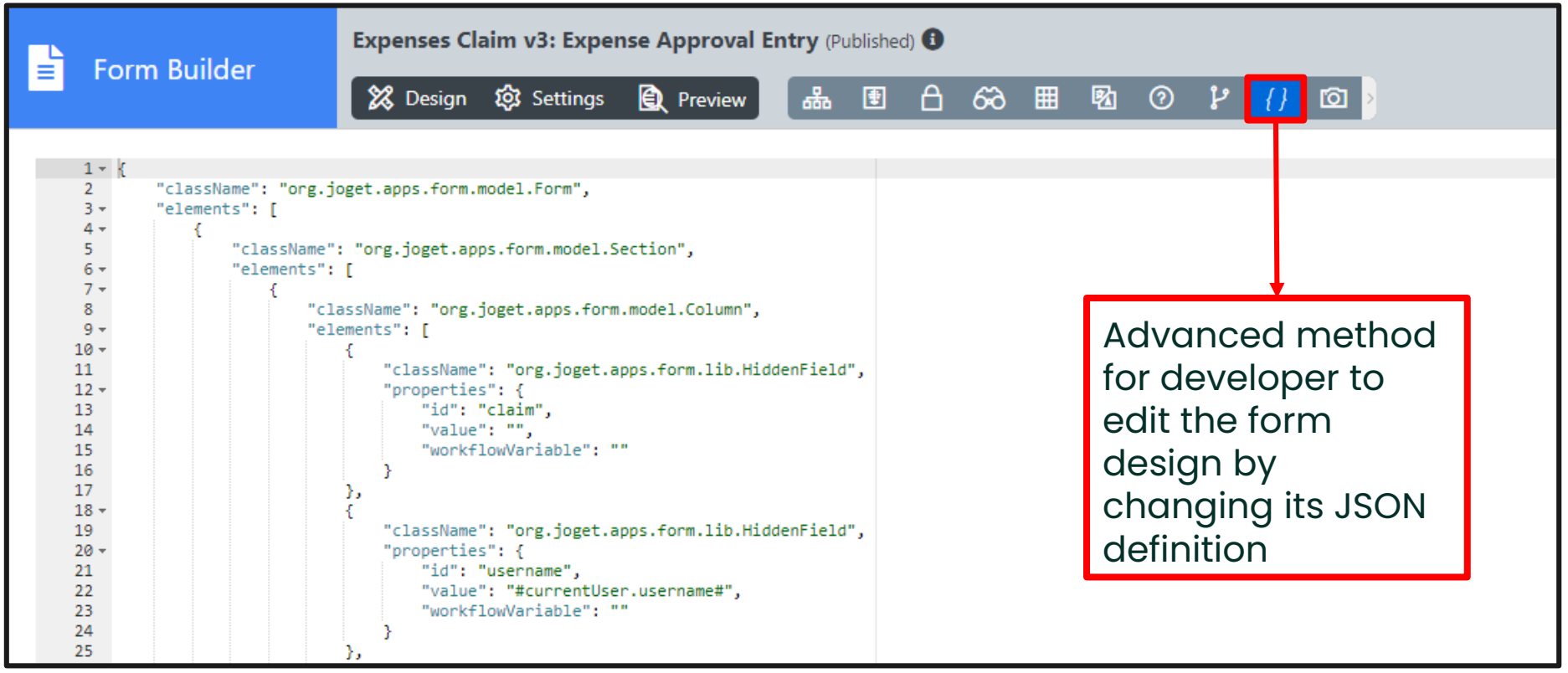
Form Builder



Plugin Types



Form Builder

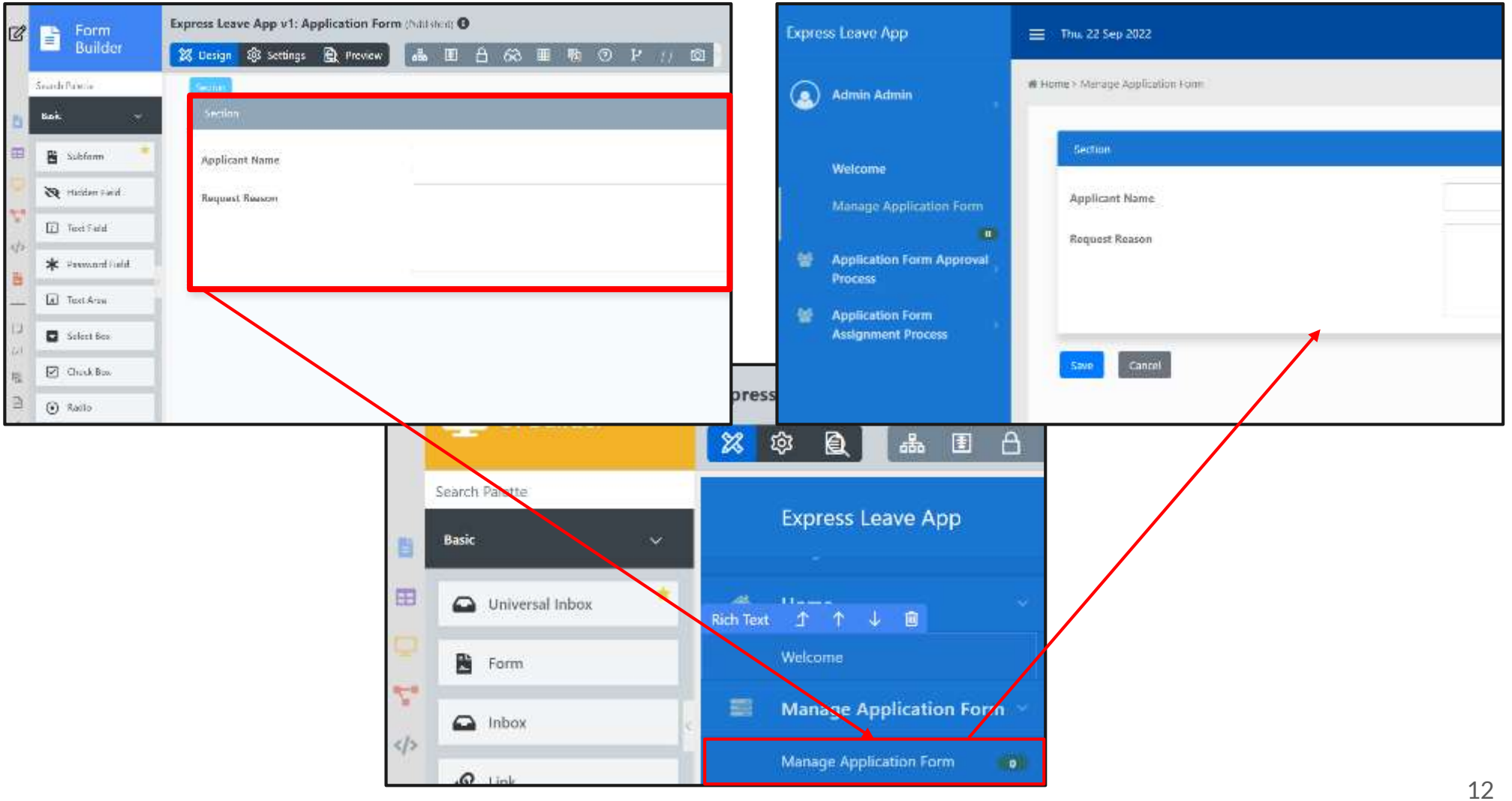


Joget

Where and How Form is used?

- By itself
  - Each form record is distinctive by itself.
  - Made accessible through the use of UIs.

Form or CRUD in UI

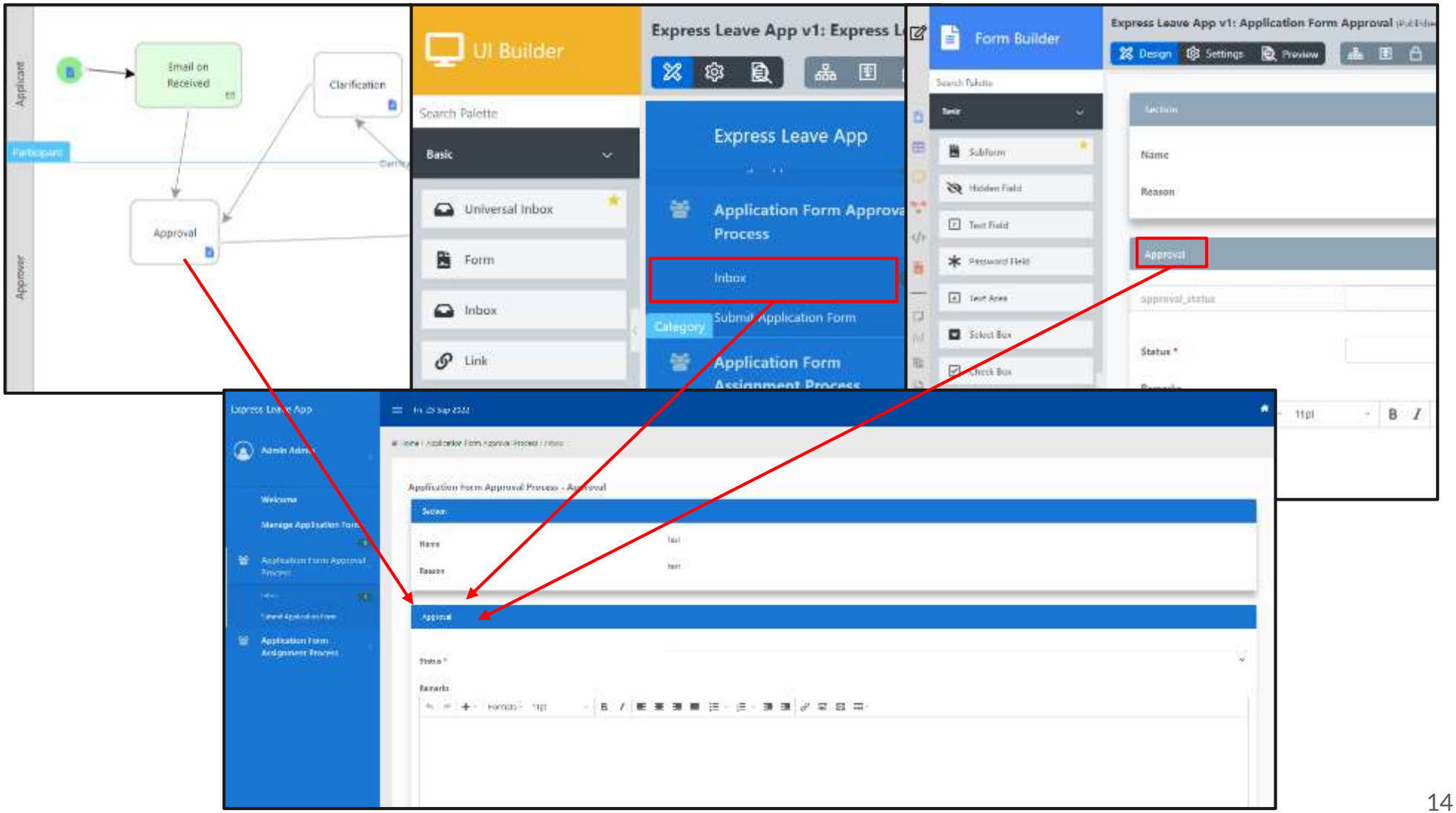


Joget

Where and How Form is Used?

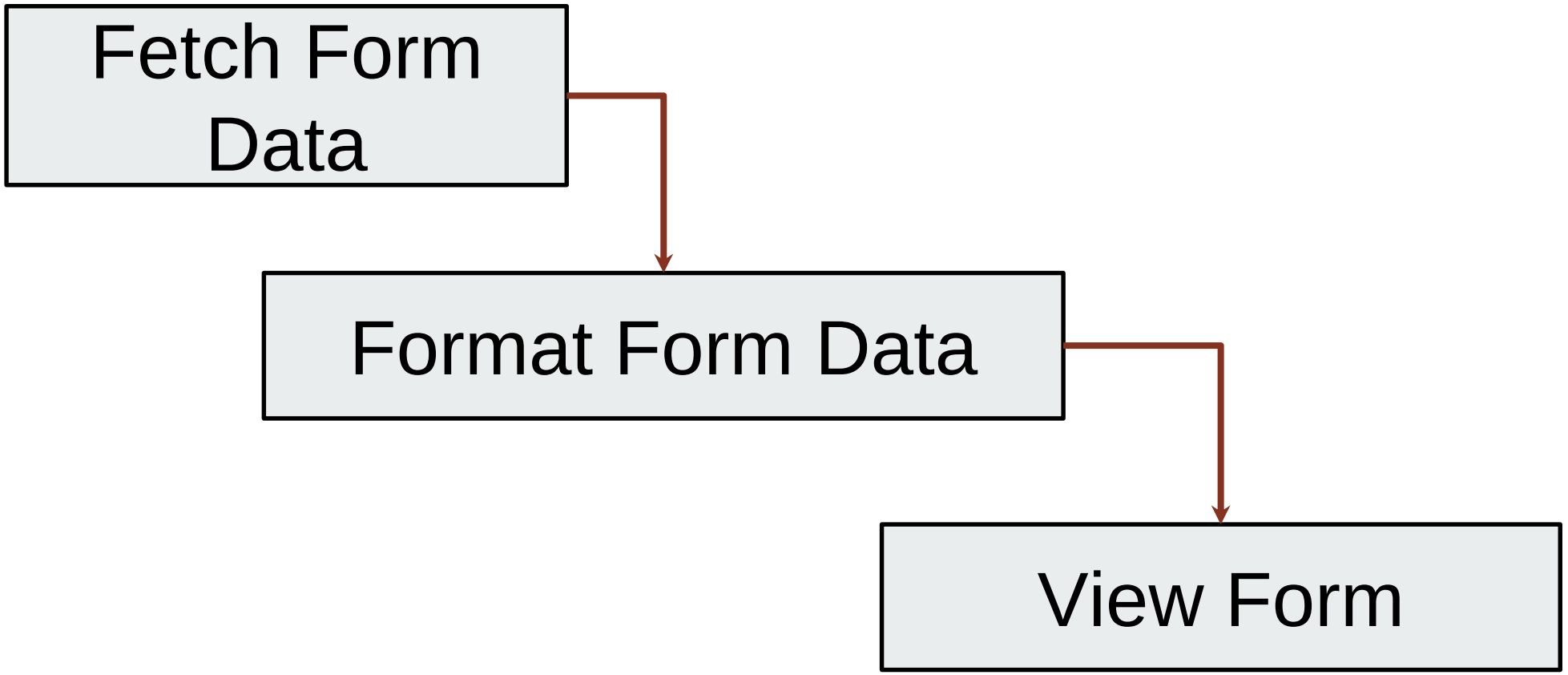
- Part of a Process
  - Each form record relates to a process instance.
  - Made accessible through the process activity's assignment view in the Inbox.
    - Inbox is made accessible via the **App Center** or **UI**.

Form - Assignment - Inbox - UI



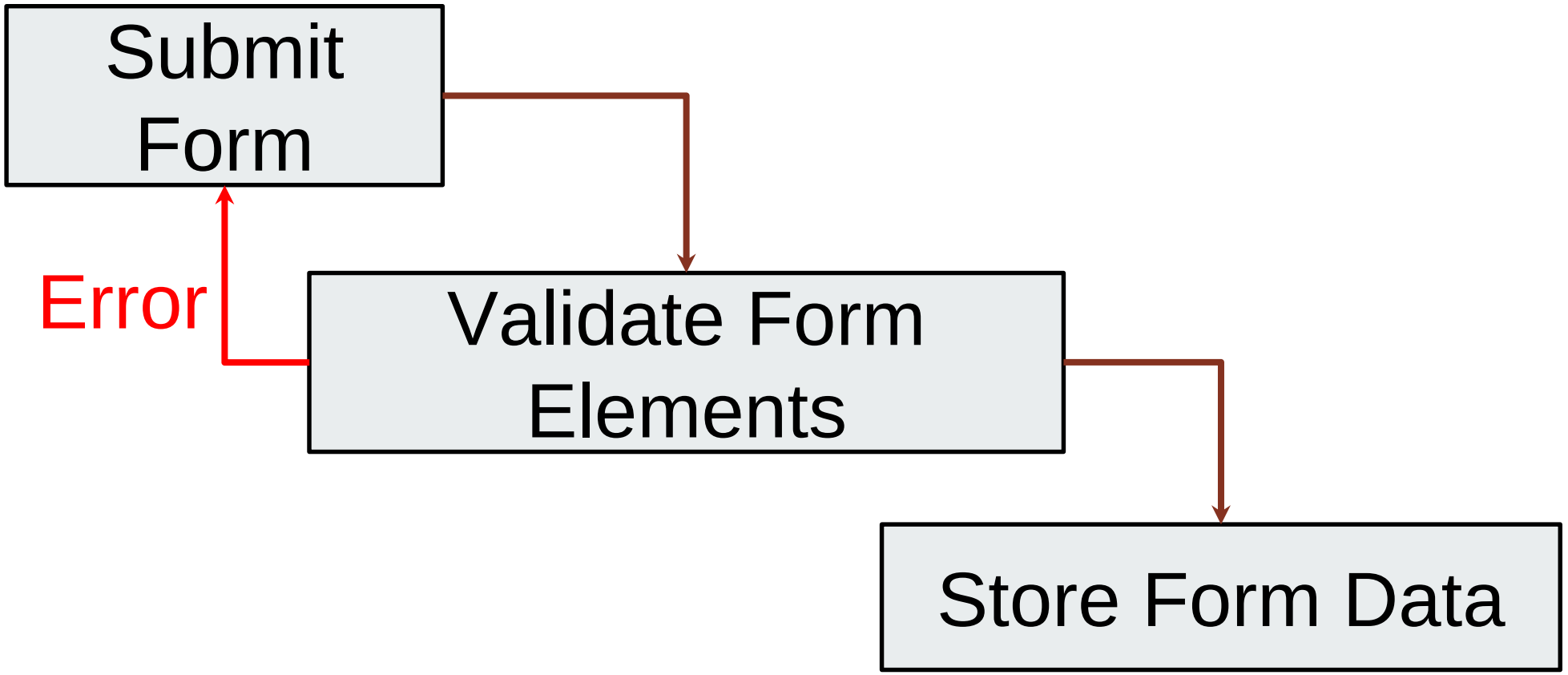
Viewing a Form

- In general, this is how a Form is loaded.



Submitting a Form

- In general, this is how a Form is handled when submitted.



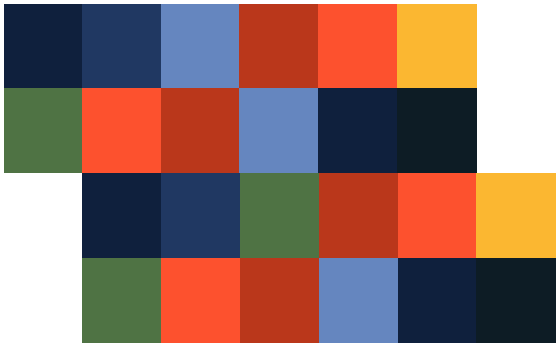
Good To Know

- It is not possible to run/view a Form without having Joget running as the server.

Joget

Chapter Review

- General understanding on how Form and Form Builder works.



Chapter 2

Designing Your First Form

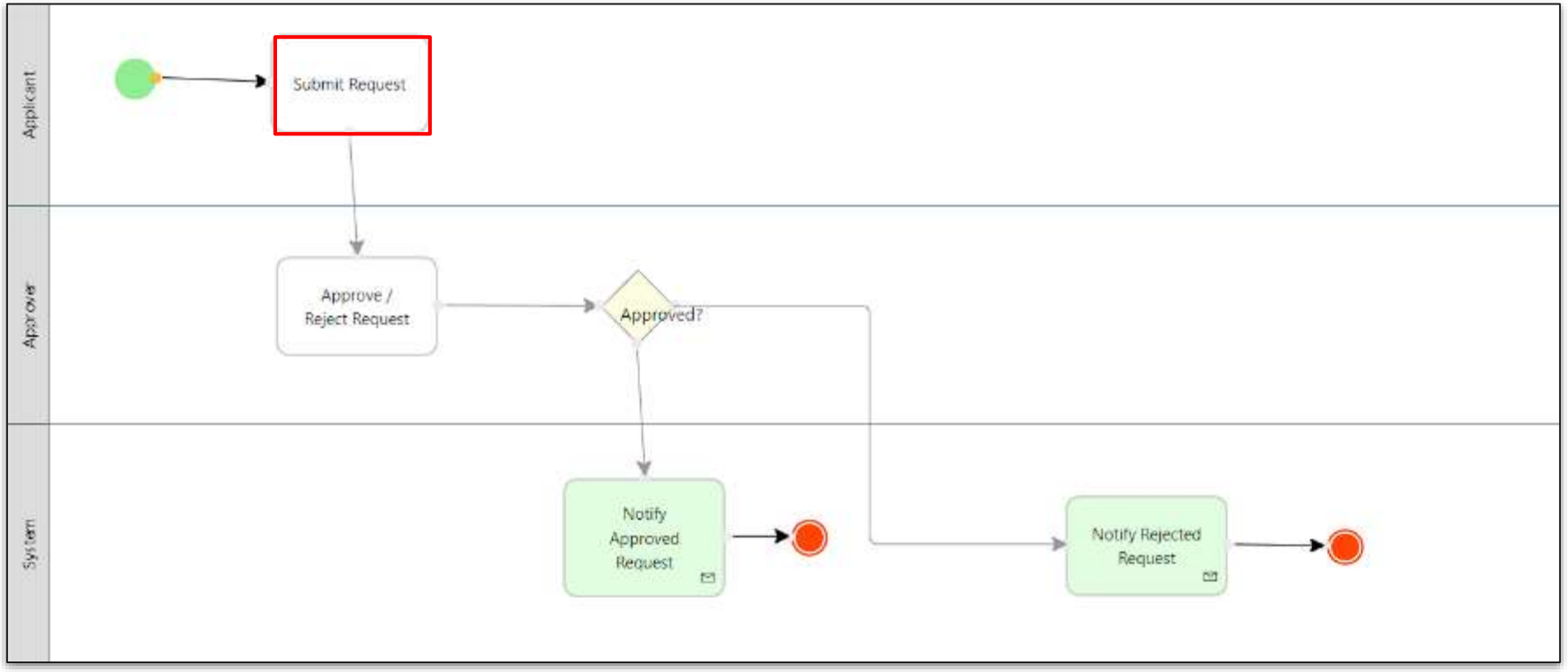
Joget

Just In Case...

- This module's app will continue development from module 3, you can download the app **3.3.jwa** to follow along the exercises.

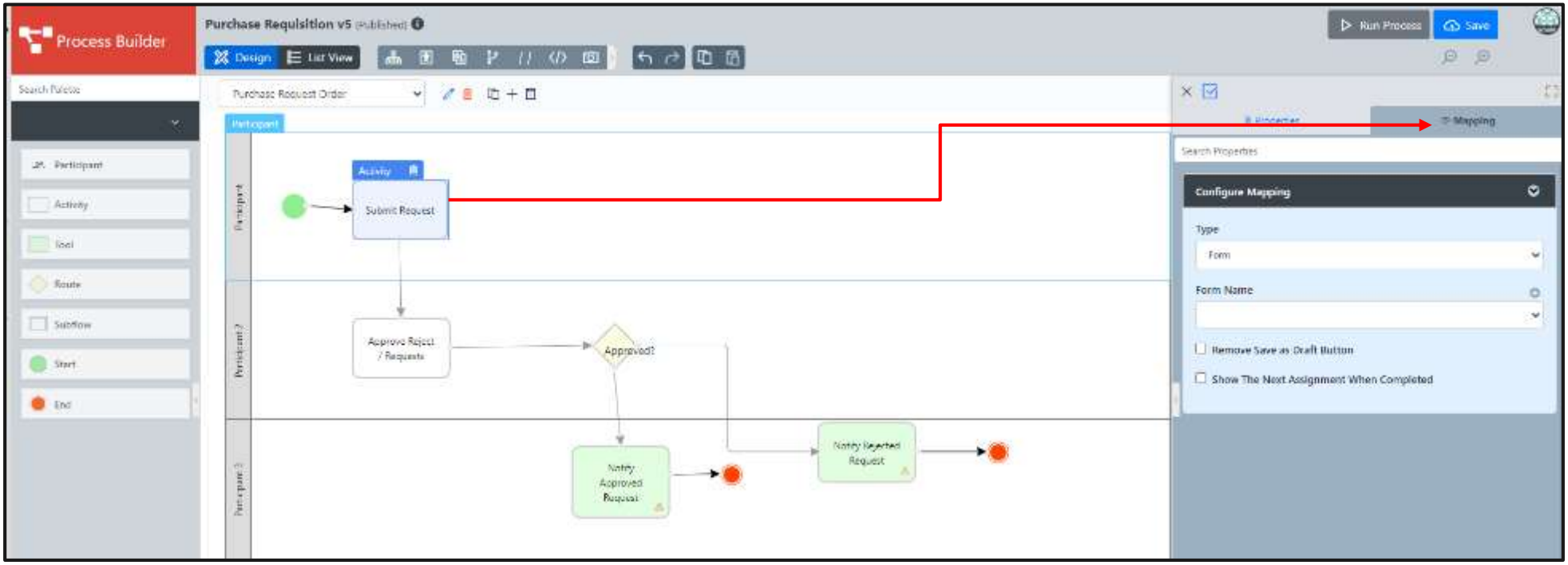
Association With the Process Flow

- Designing the first form for the first activity in the flow.



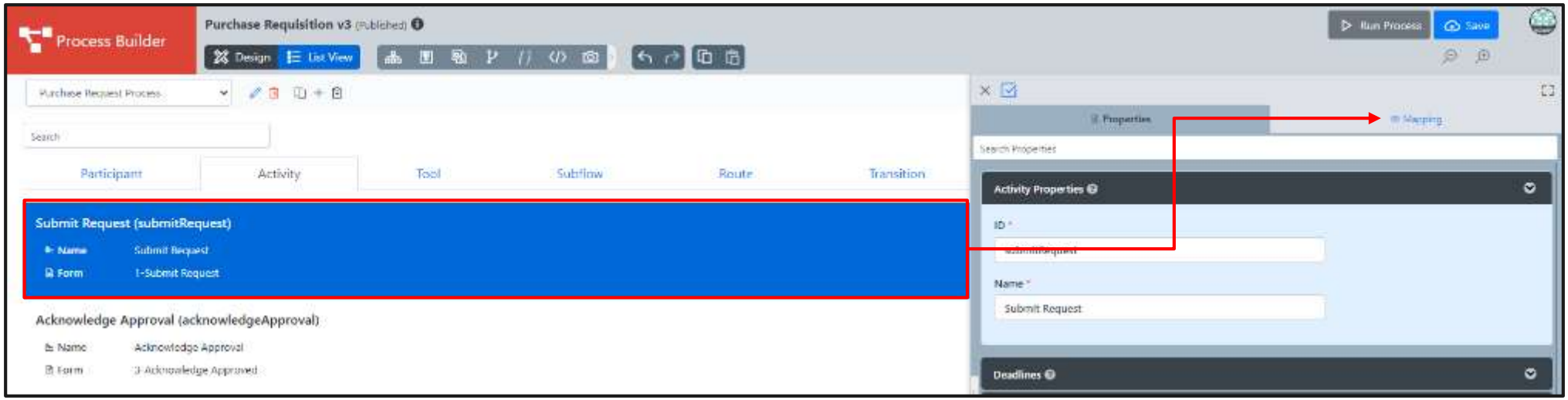
Map Activities to Form

- In the Process's **Design**, Click on "Submit Request" activity.
- Click on **Mapping** in The **Property Editor.**



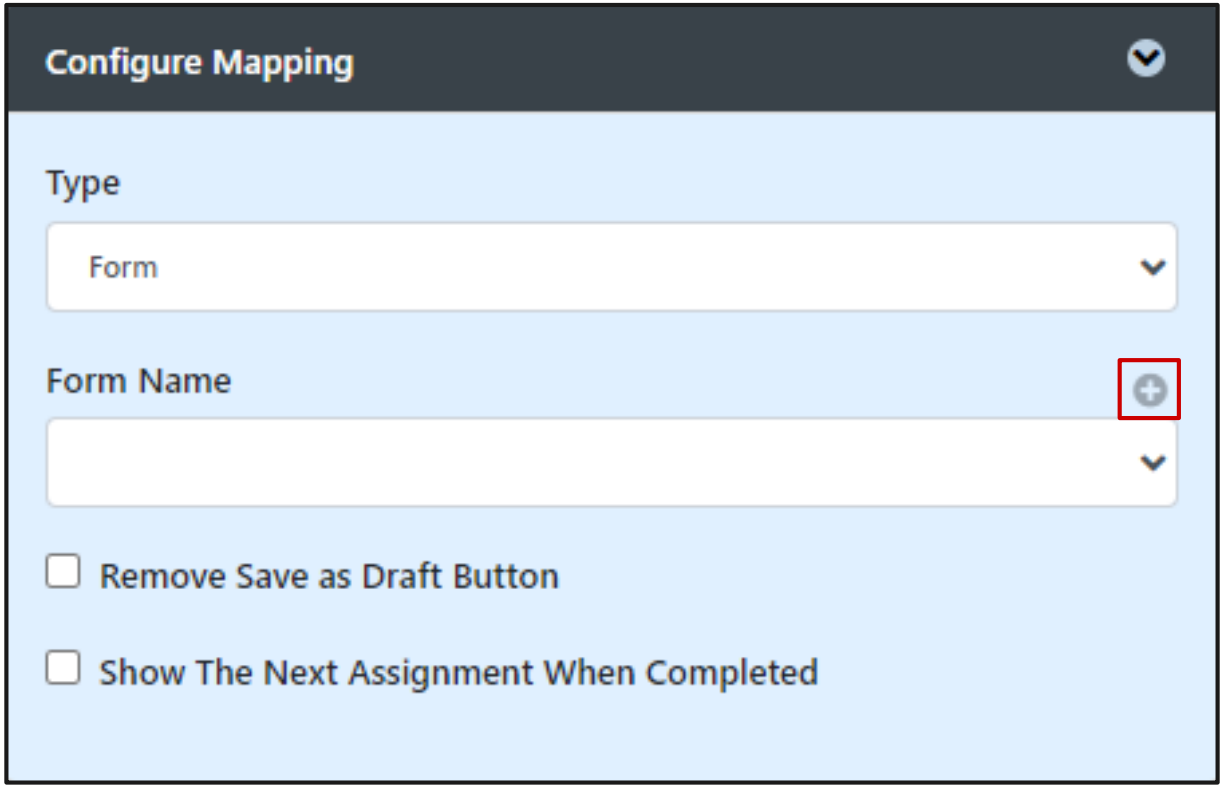
Map Activities to Form

- Alternatively, Go to App's **Processes** -> **List View** -> **Activity.**
- Click on "Submit Request" activity, then click on **Mapping** in the Property Editor.



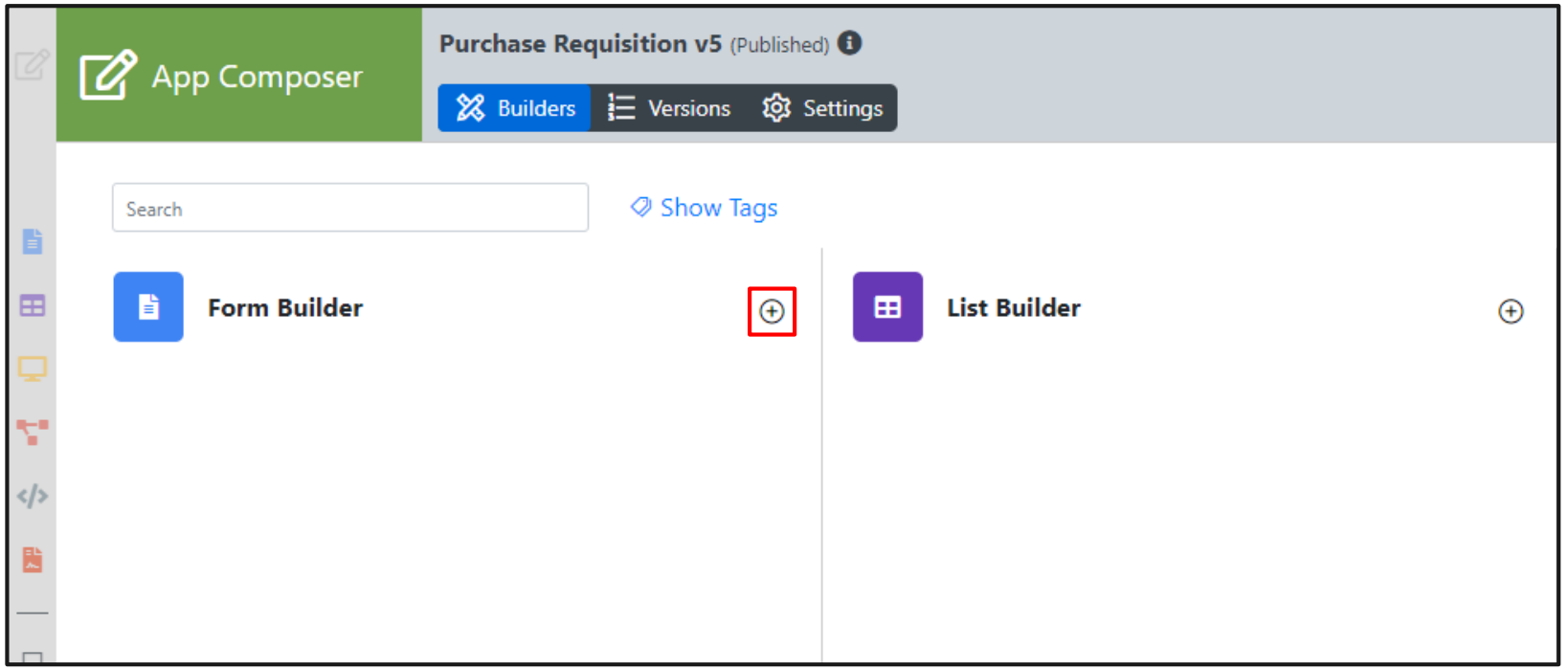
Add/Edit Form

- Click on the "**+**" to create a new form.

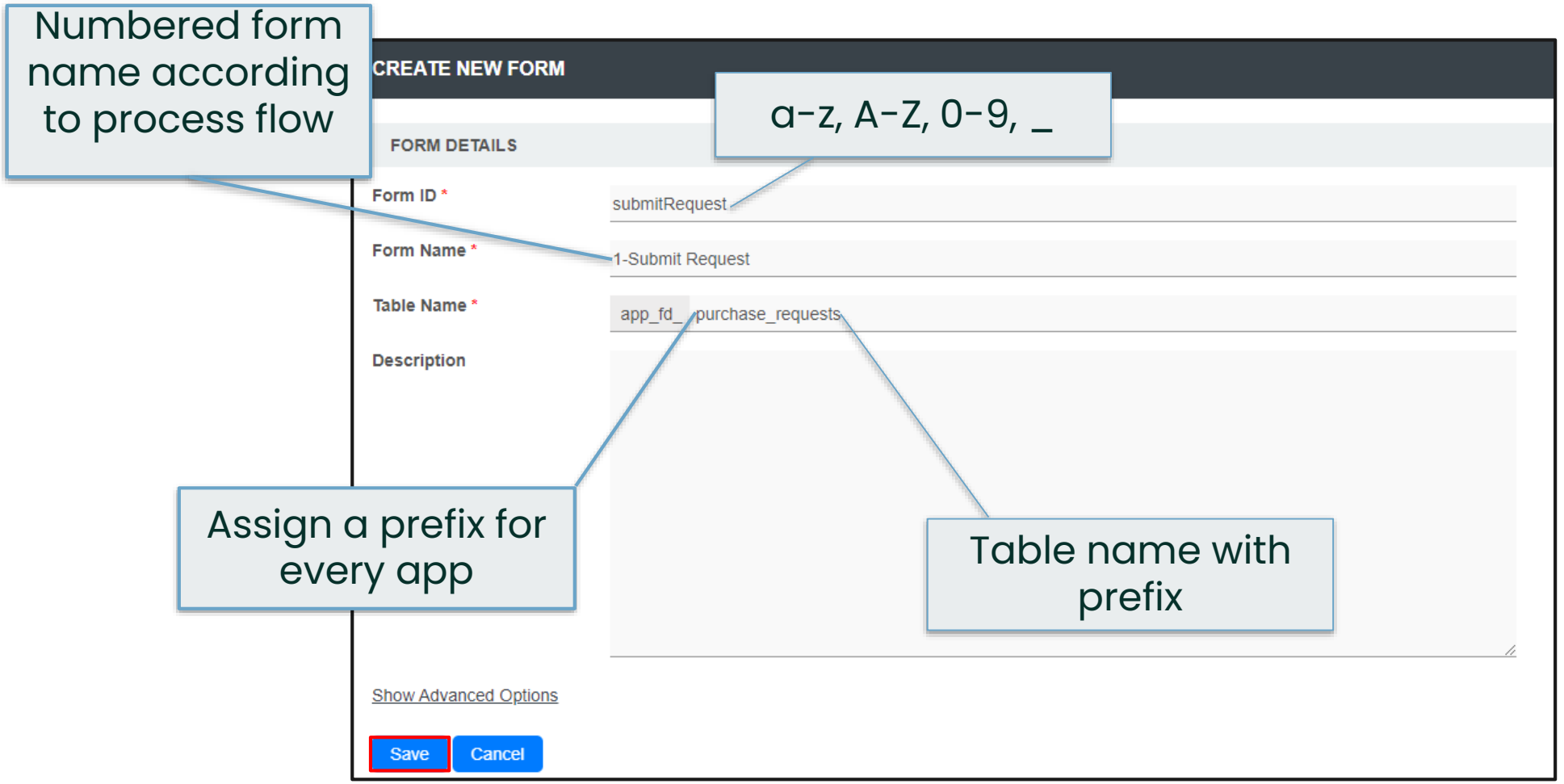


Alternative Way of Creating New Form

- One can also go to the **App Composer** to create the new form and **add** the **newly created form** to the **activity mapping** later on.



Create a New Form, for “Submit Request” Activity



Joget

App Prefix for Table Name

- By default, **ALL form data** will be stored into the **same database** that Joget is using.
- **All Apps** are storing into the **same database** as well.
- Therefore, it is very **important** to segregate the form data by App by declaring its own prefix before defining its designated table name. (e.g. purchase_requests)

Naming Convention

- Use **camel case** for App ID, Process ID, Activity ID. For example:-
  - **purchaseRequisition**
  - **purchaseRequestProcess**
  - **submitRequest**
- Do not use **snake case** as it conflicts with process instance ID naming convention:- 1_purchaseRequisition_purchaseRequestProcess_submitRequest
- Maintain consistent naming convention that you have decided across the board.

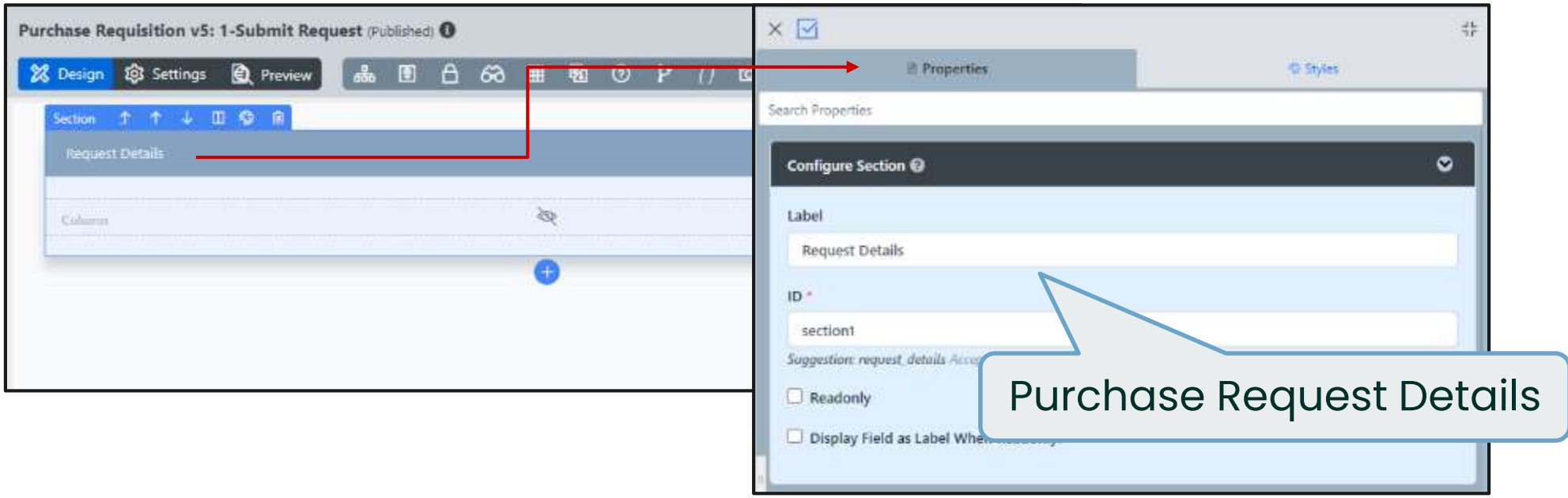
Joget

Naming Convention

- Use **snake case** for anything related to **form data storage**.
- For example:-
  - **purchase_requests**
- Just search for “database naming convention” for more information.
  E.g:
  http://stackoverflow.com/questions/7662/database-table-and-column-naming-conventions

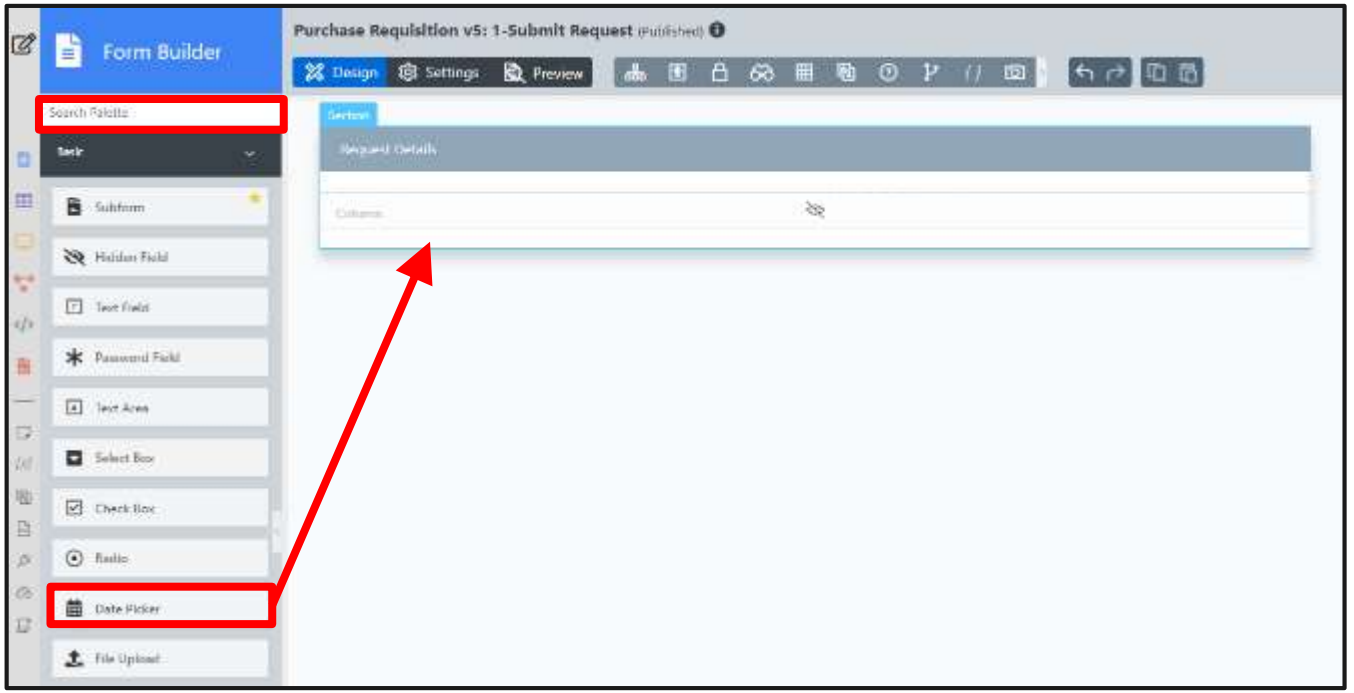
Edit Section

- Form Section serves as a placeholder for form input elements. Rename it to make it meaningful.



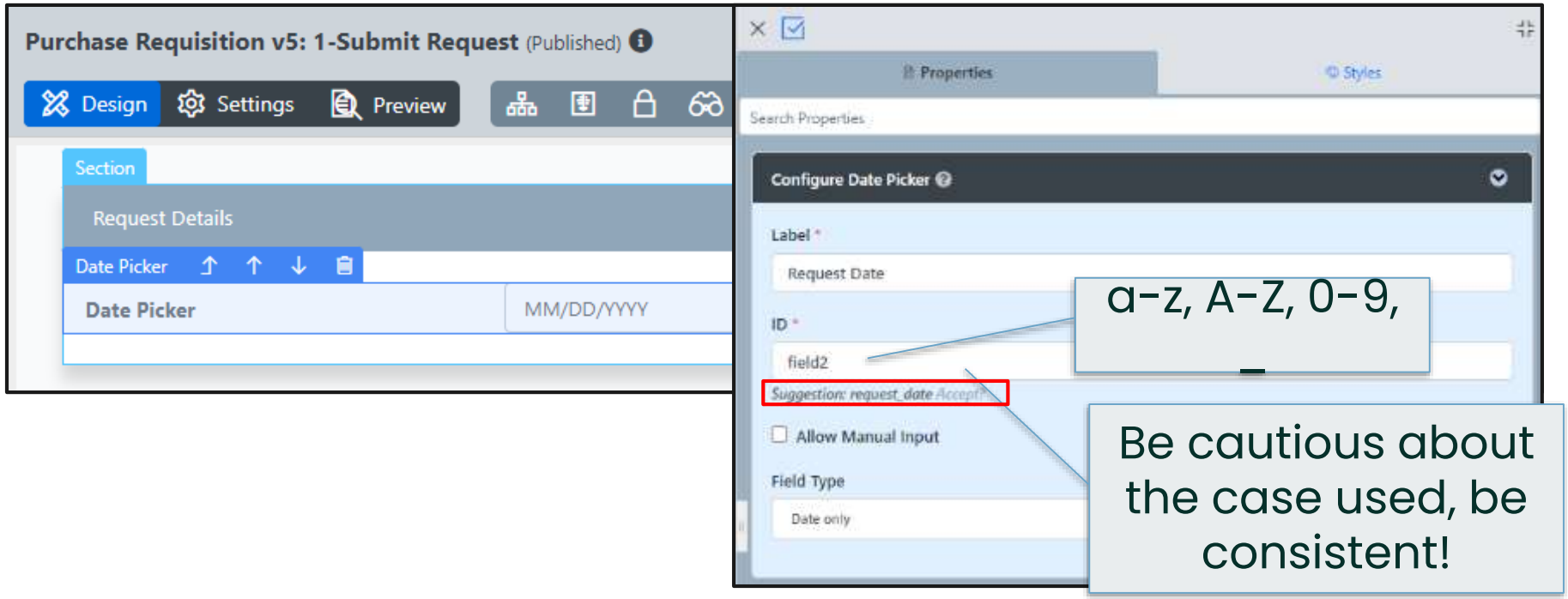
Insert Date Picker

- Insert a **Date Picker** form element by dragging it into the section placeholder.
- You can use the **Search Palette** tool to look for the element.

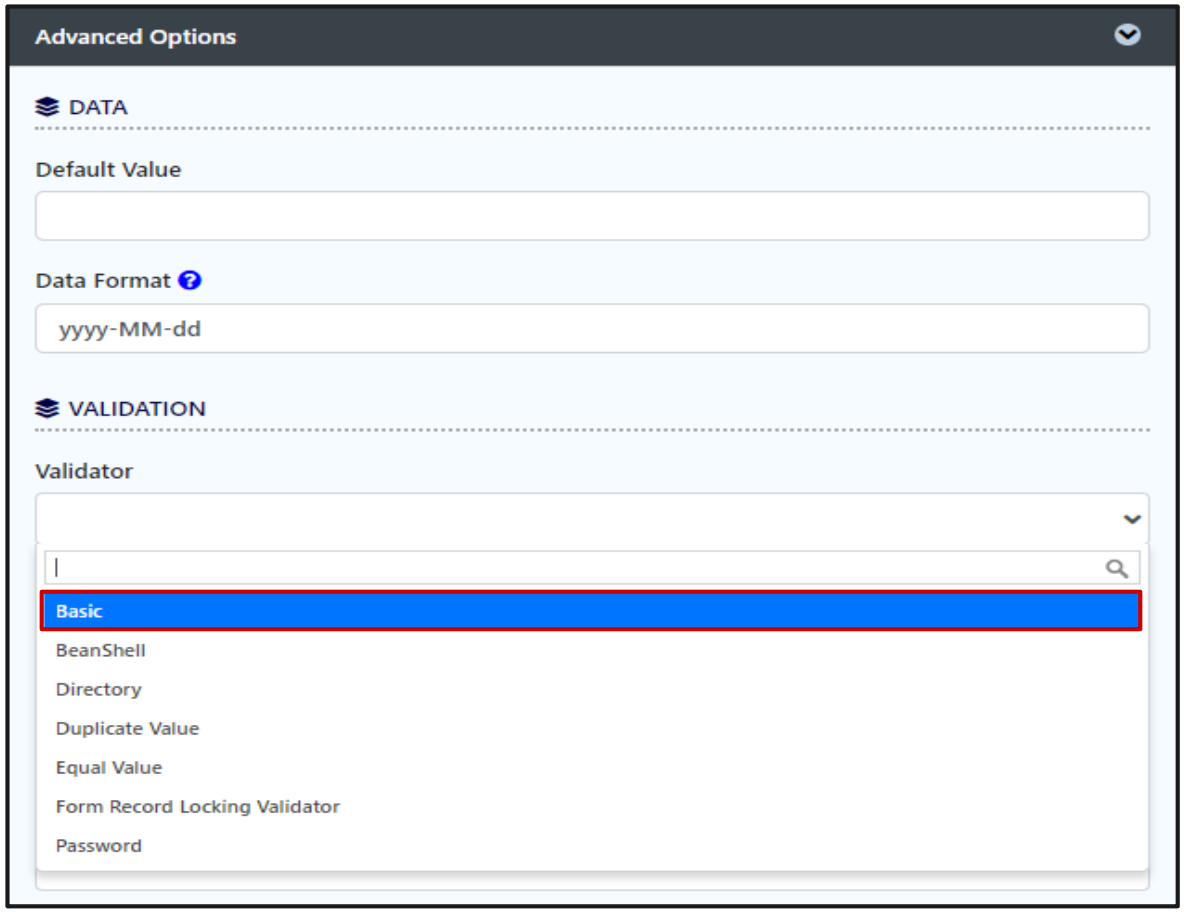


Edit The First Date Picker

- Set the **ID** according to database naming convention – use underscore instead of camel case to separate words.
- You can use the suggested ID for reliable consistency.

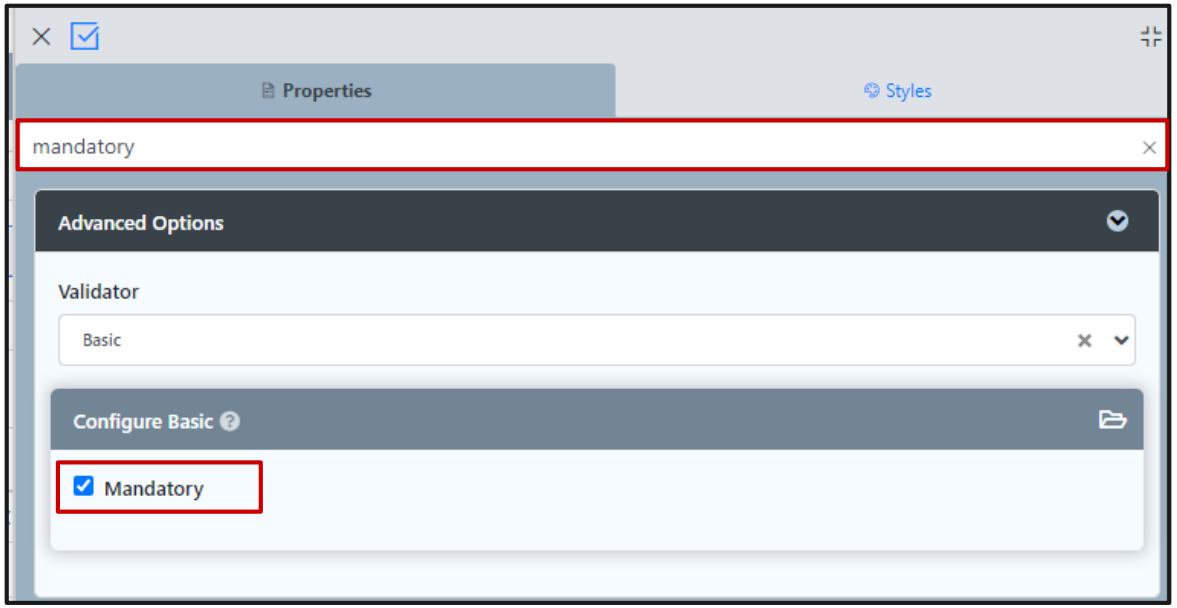


Set The Date Picker as Mandatory Field



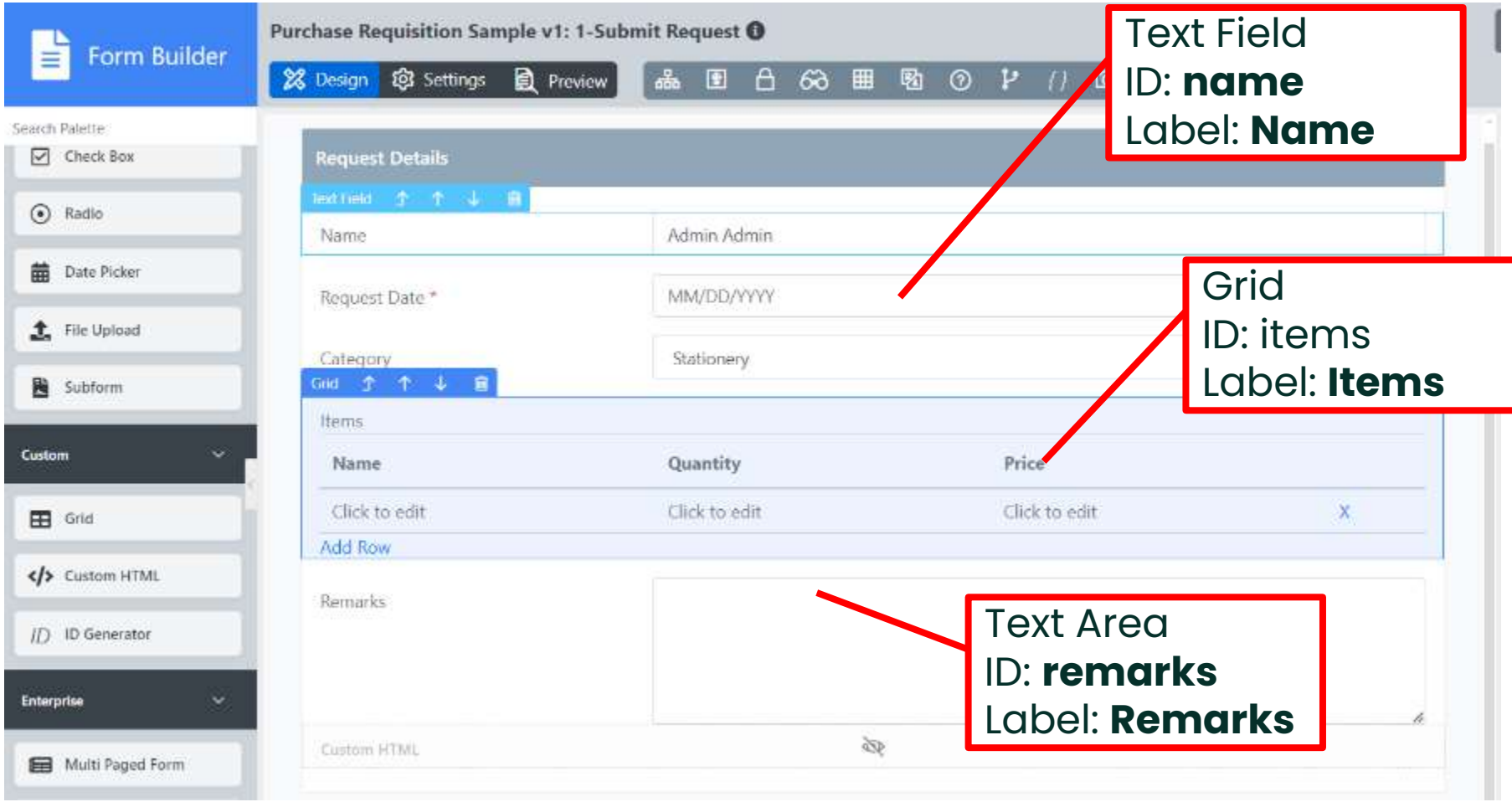
Set The Date Picker as Mandatory Field

- You can use **Search Properties** to quickly find and navigate to the property that you need to edit.



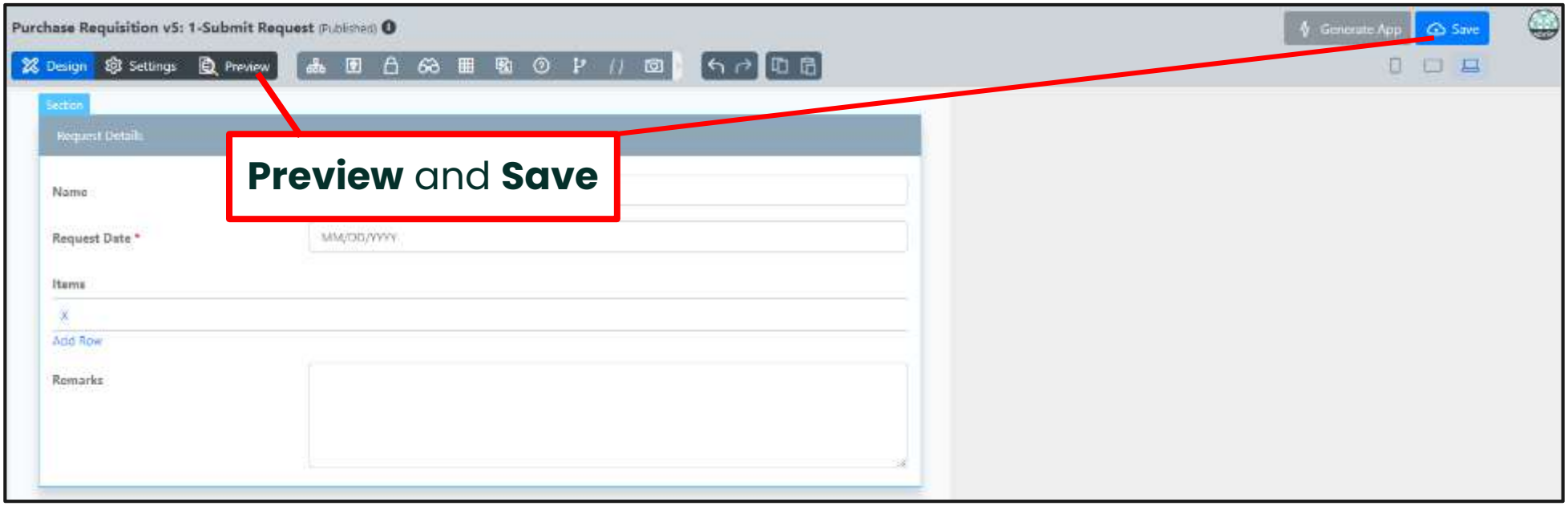
Complete the Design of "Submit Request" Form

- Add text field, grid, and text area.



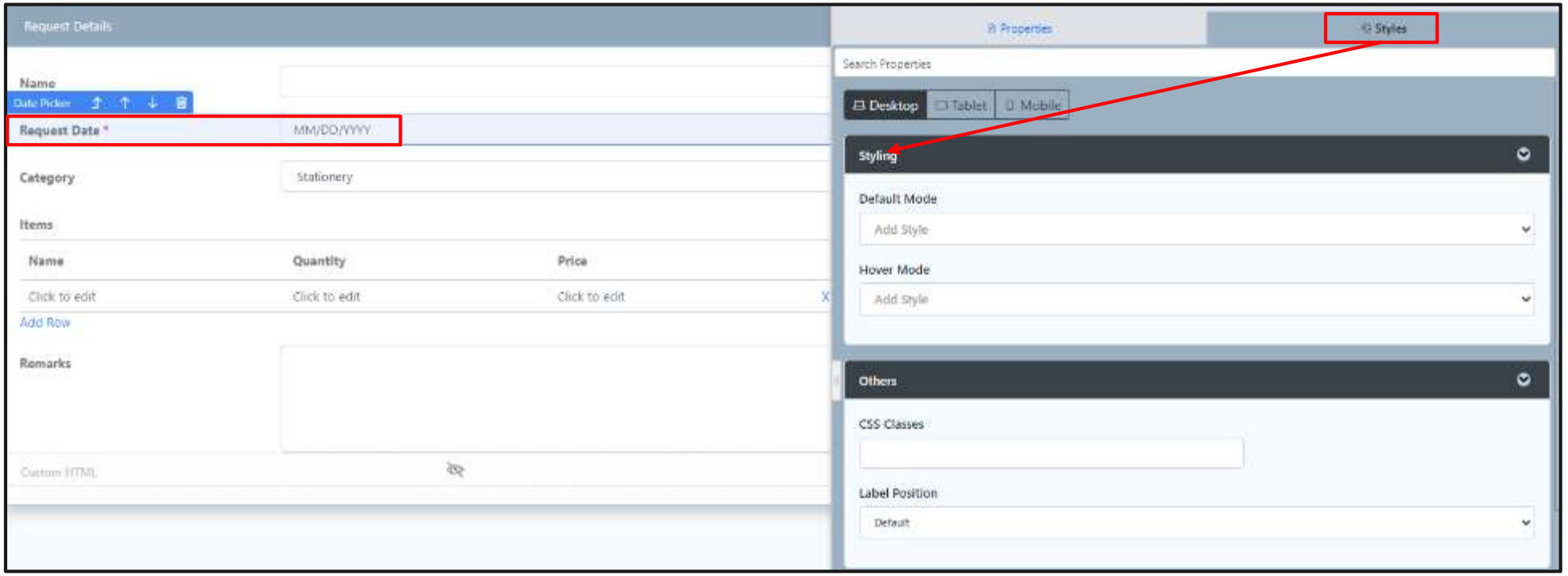
Complete the Design of “Submit Request” Form

- Preview and save.



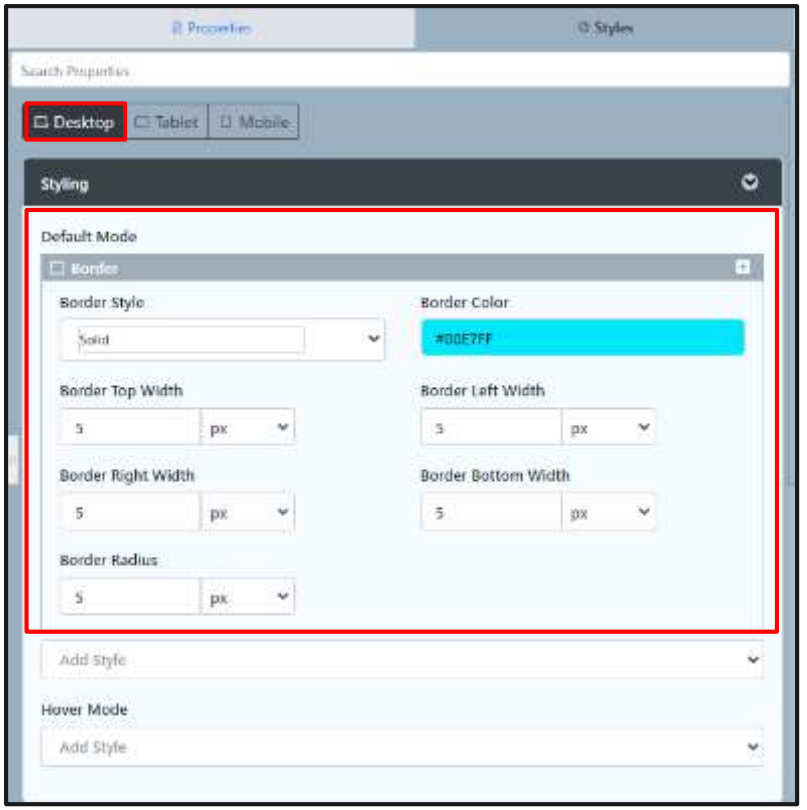
Edit an Element's Style

- You can control a form element's styling (CSS) directly through the form builder's **Property Editor.**
- To start, select the form element (in this case let's choose the date picker element. Then go to the **Styles** tab in the property editor.



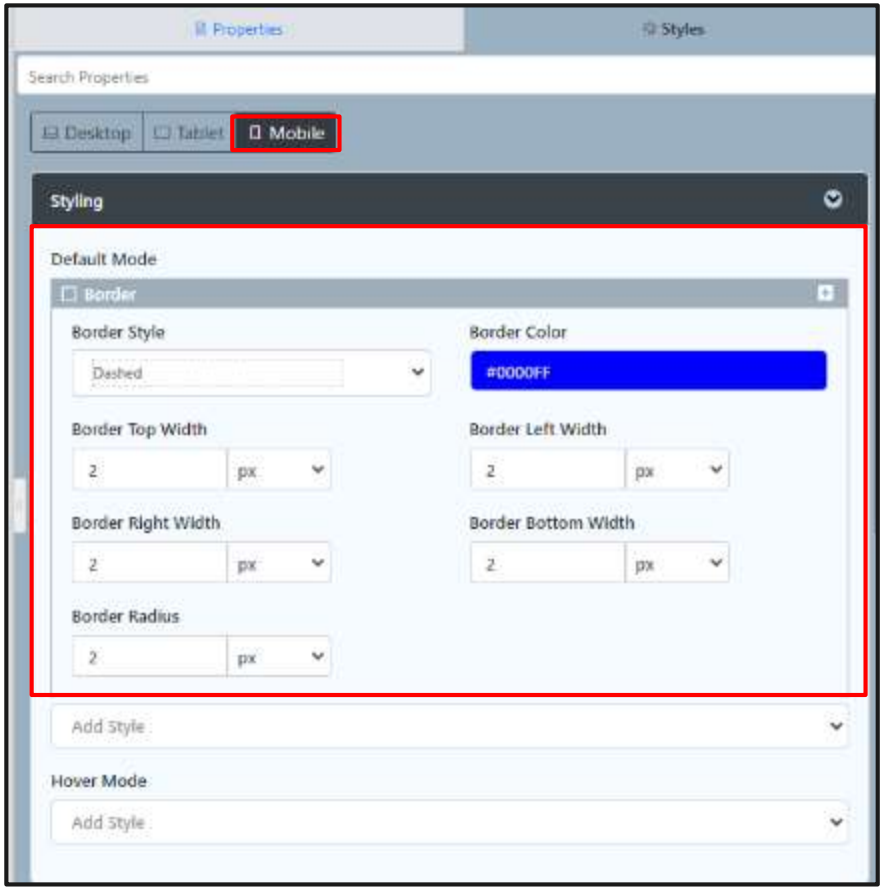
Edit an Element's Style

- In the styles tab, you can design how each form element is to be viewed on a Desktop,Mobile or Tablet Device**.**
- For the **Desktop** Device, add a border and configure the settings as shown.



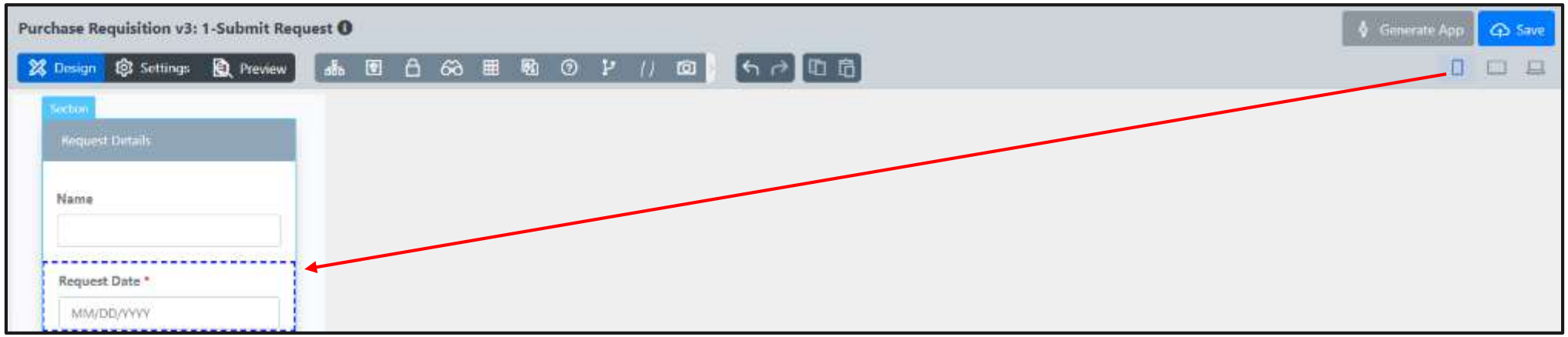
Edit an Element's Style

- In the styles tab, you can design how each form element is to be viewed on a Desktop,Mobile or Tablet Device**.**
- For the **Mobile** Device, add a border and configure the settings as shown.

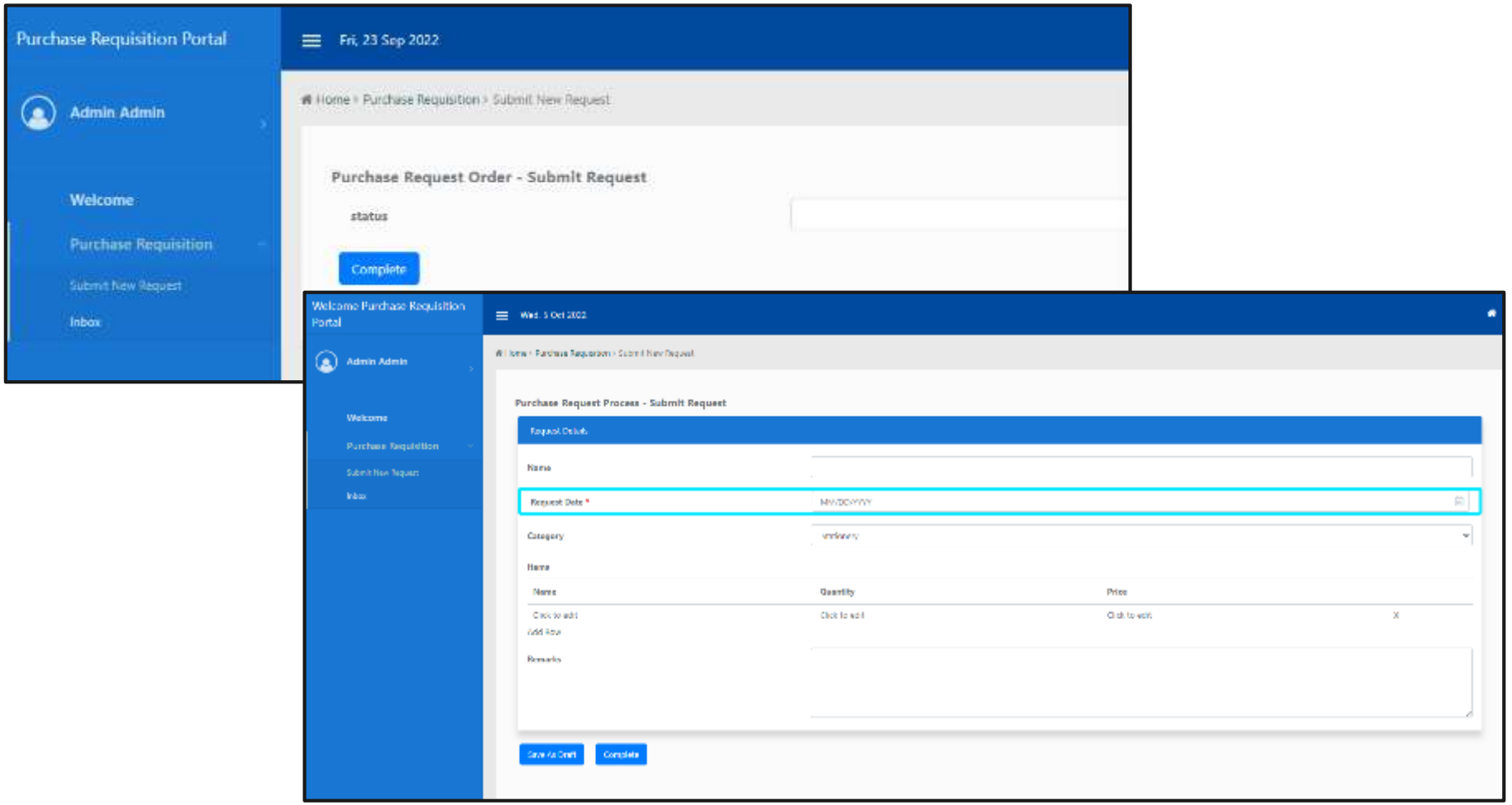


View an Element's Style

- To see the new changes to the element's style, apply changes in the property editor then preview as **Desktop** then as **Mobile**.



How the Form Looks Like When You Launch “Run Process” Now?



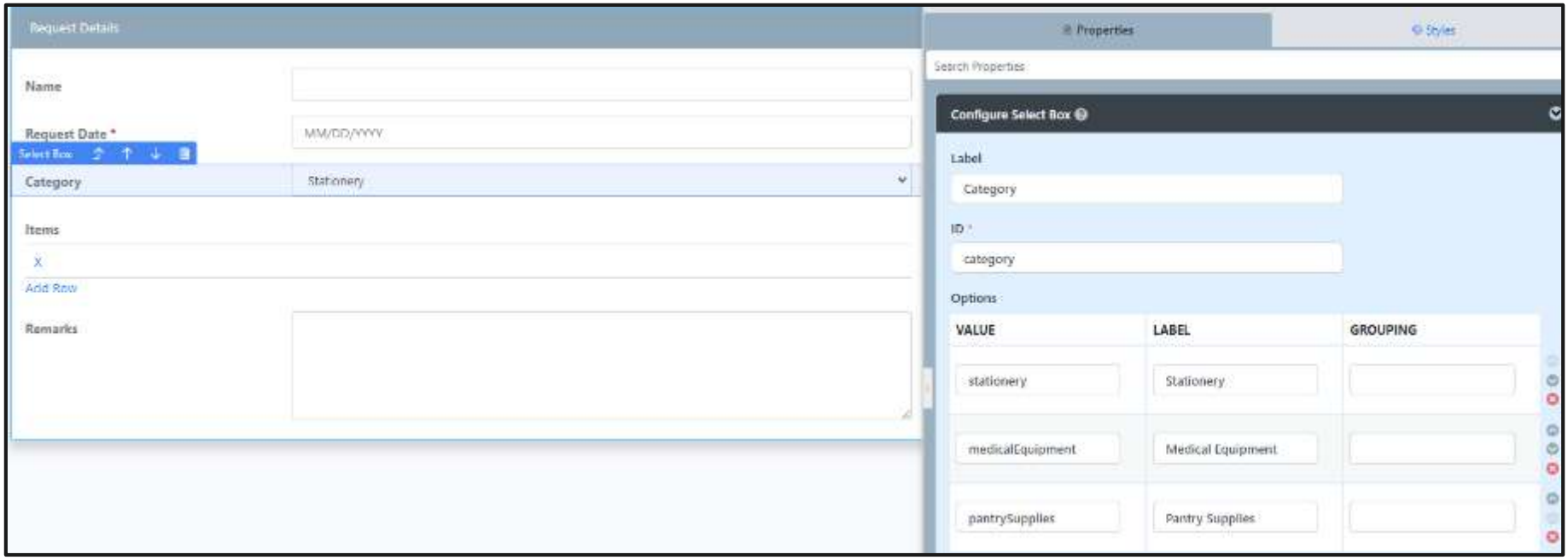
Joget

Exercise 1

- Fill in the form, leave “Request Date” empty to test out form validation.
- Try to submit the form.
- Now fill up all the fields and complete the assignment.

Exercise 2

- Add a new **Select Box** called “Category” with the following options:-
  - Stationery
  - Medical Equipment
  - Pantry Supplies



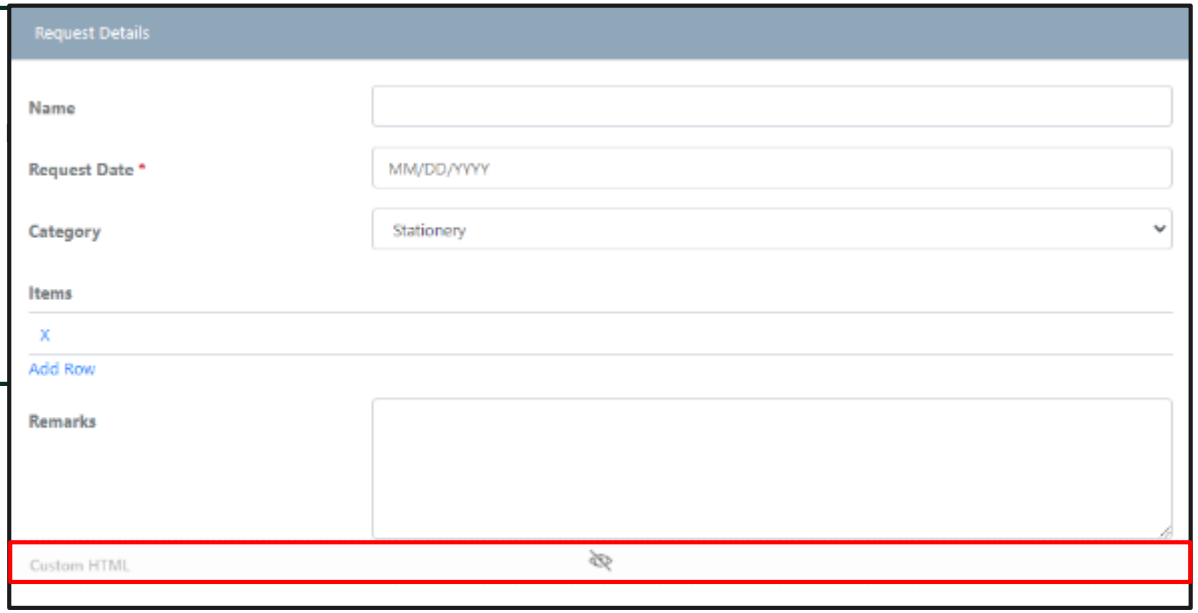
Exercise 3 – Optional

- Customize the look and feel of how the form is rendered by modifying its CSS.
  - Add a **Custom HTML** form element into the bottom of the form.
  - Edit it, add the following code into **Custom HTML** property.

```
<style type="text/css">

.form-cell .label, .subfo
cell .label{
        width: 100%;
}

</style>
```



Joget

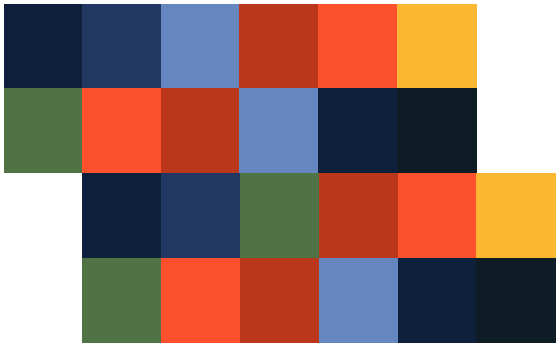
Discussion

- Do you know that you can still modify forms even after (your app has been published) and users started using them?
- What will happen to the submitted data if you delete form elements that is previously added in the form?

Joget

Chapter Review

- Associating activity with form
- Creating Form and understanding the basic elements and validations.
- Accessing assignment with a Form associated.

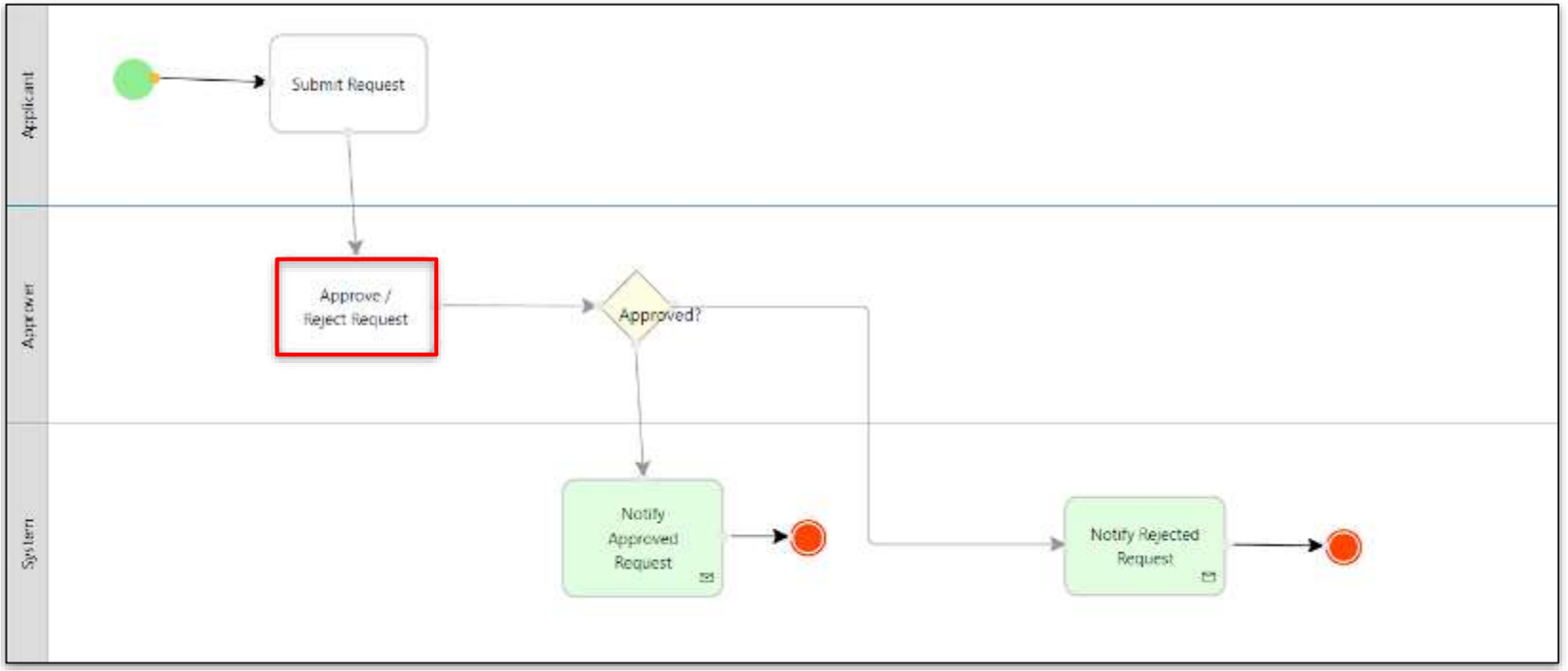


Chapter 3

Controlling Process by Using Form

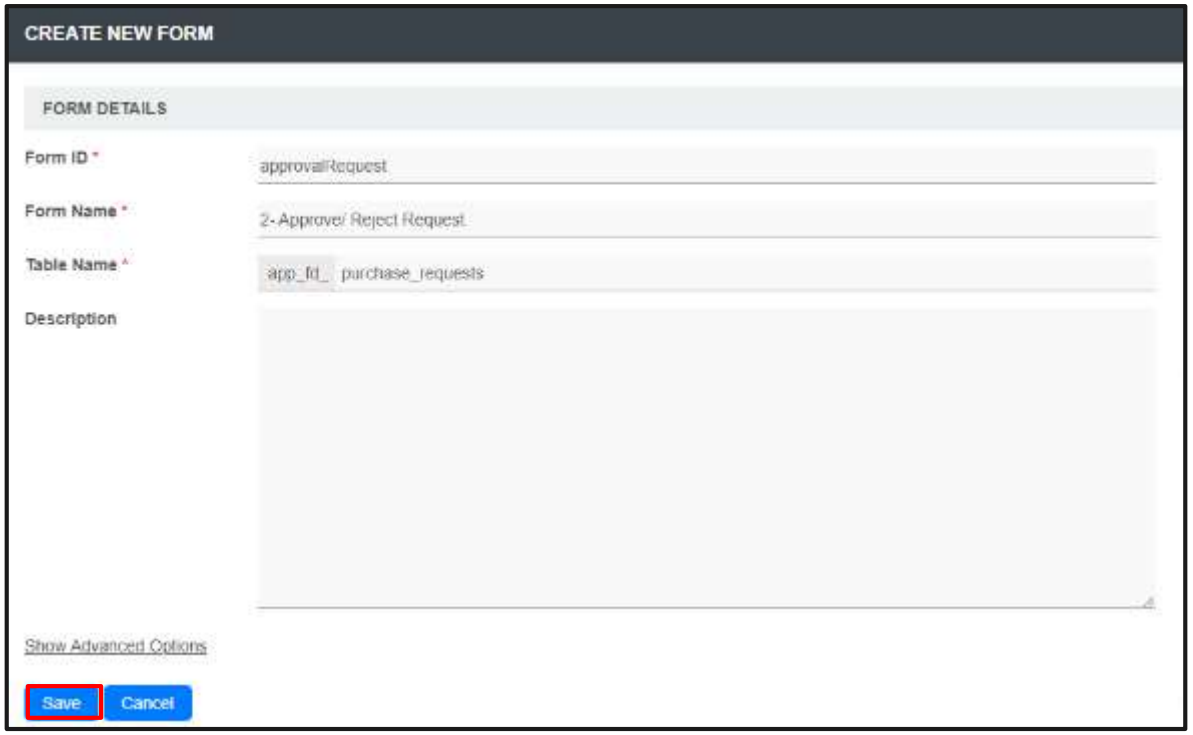
Association With the Process

- Designing the second form for the second activity in the flow.
- Form controls the next course of action in the process flow.



Create a New Form for “Approve / Reject Request” Activity

- Click on “Add/Edit Form” on “Approve / Reject Request” activity.
  Fill in the following details.

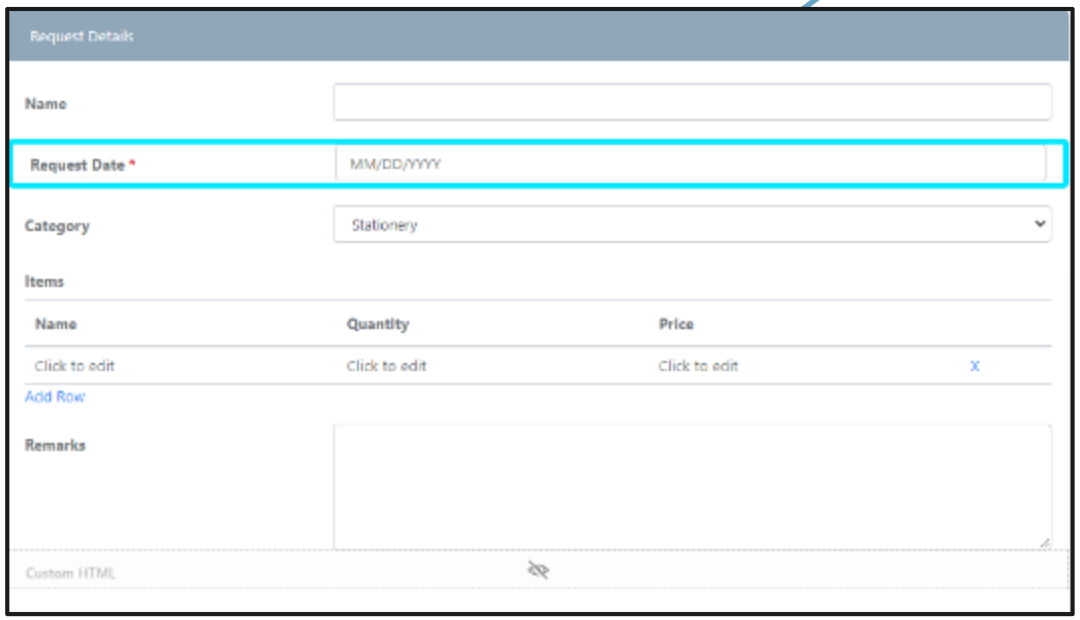


Using Subform

- **Subform** allows one to make **reference** to existing form without duplicating form design again.

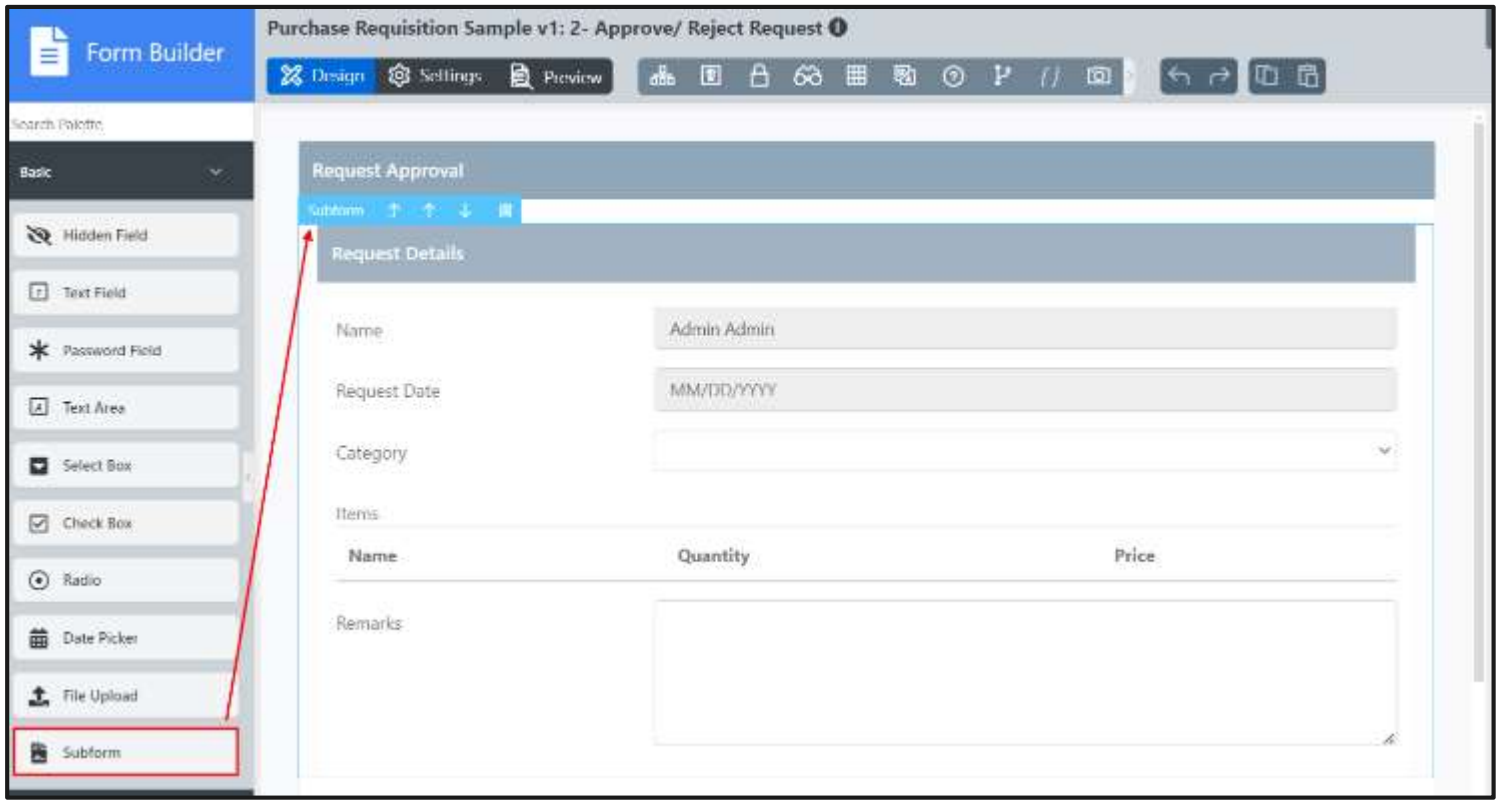
Approve / Reject Request Form

Using "**1-Submit Request**" as **Subform**

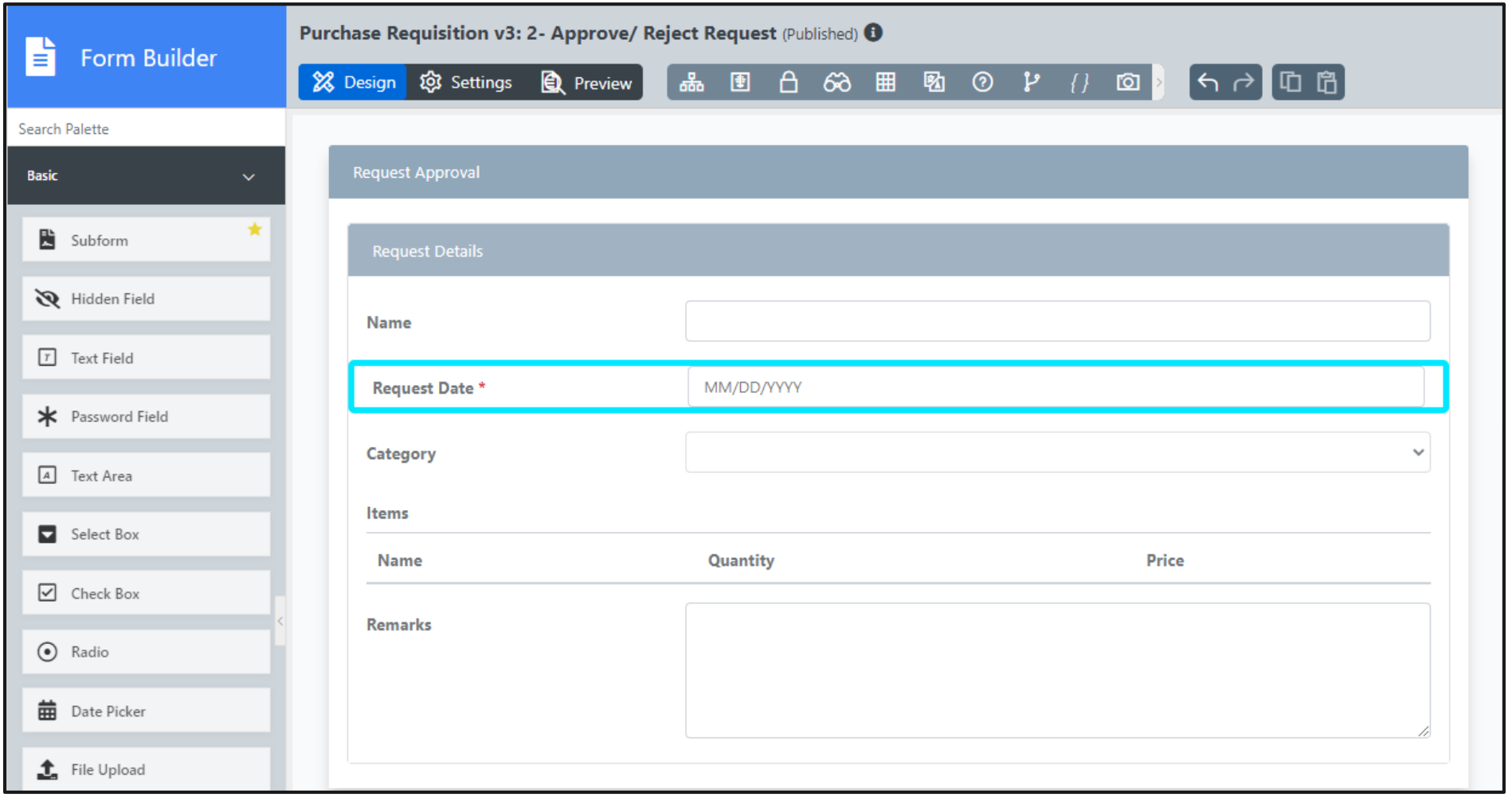


Using Subform

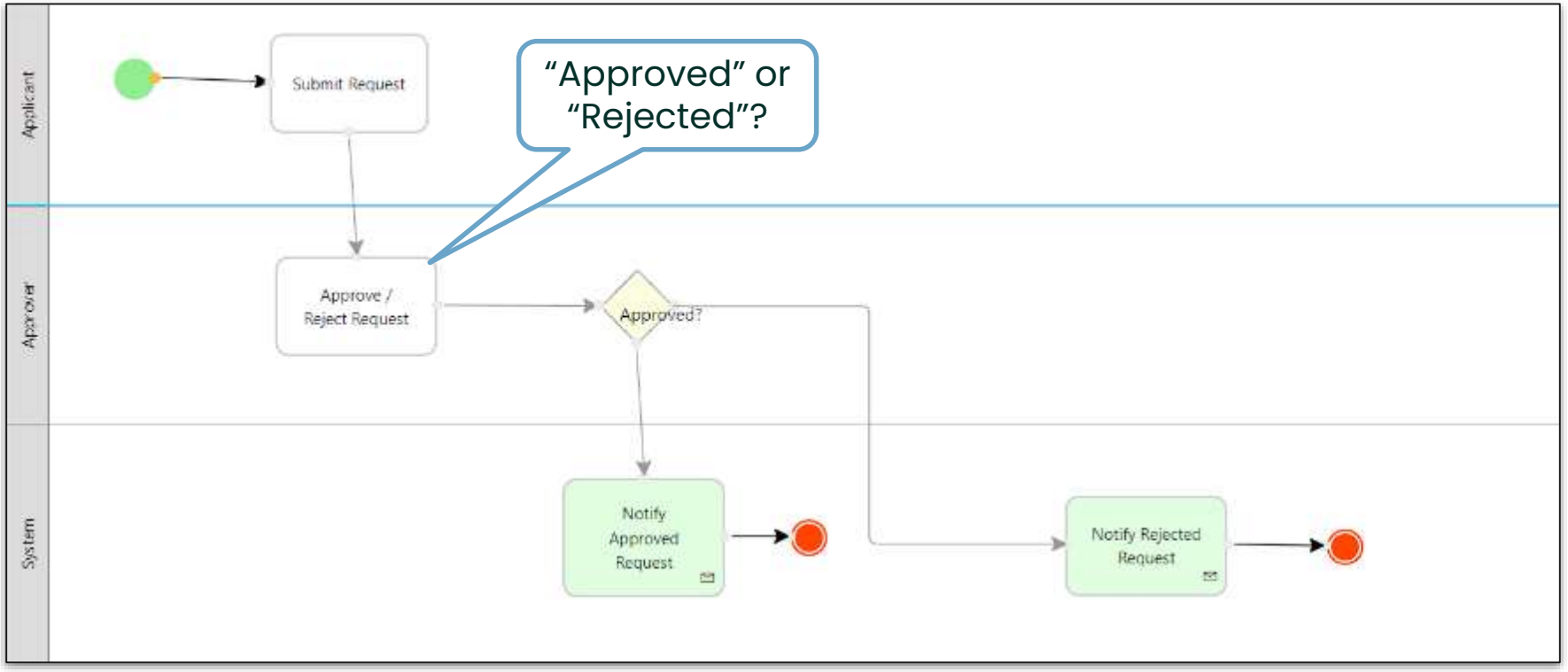
- Rename the section and add in **Subform**.
- Edit the **Subform** to point to the first form.
- Set it to read only.



Using “1-Submit Request” As Subform

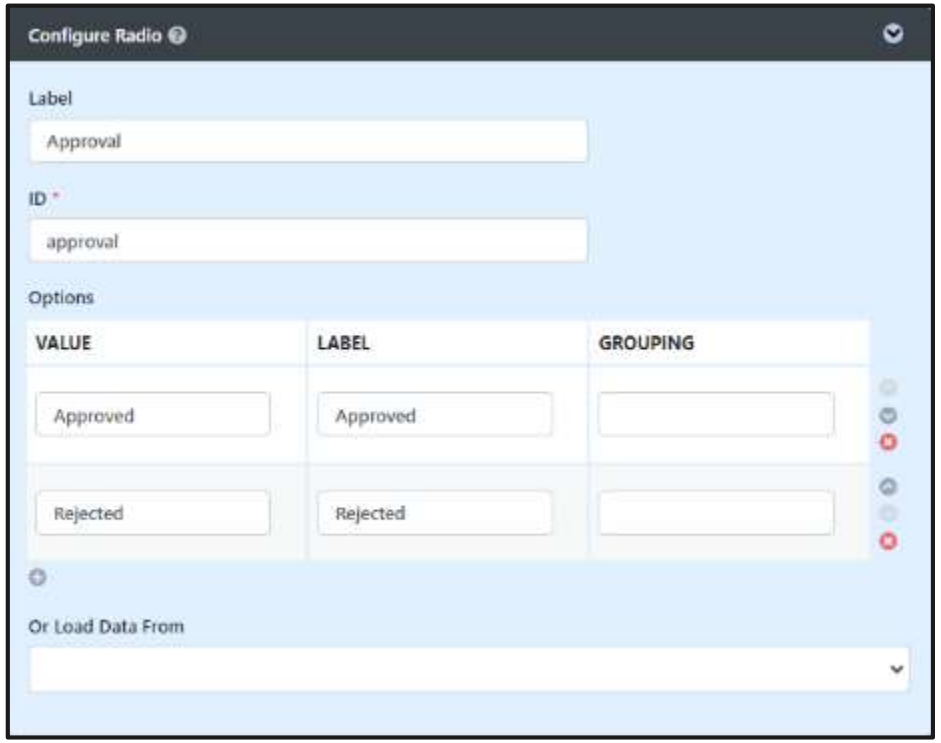


What About the Approval Status?



Insert Radio Button

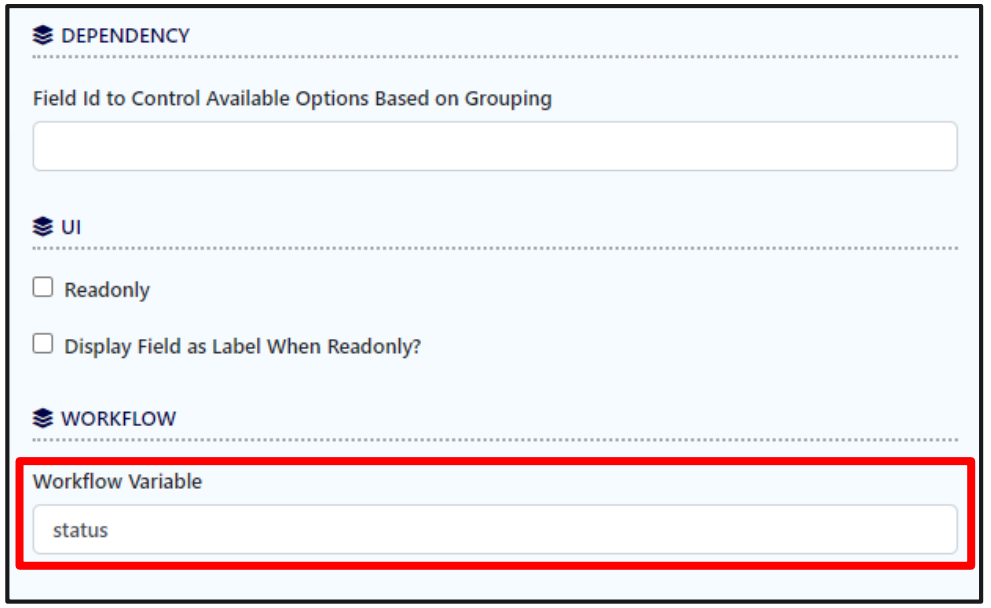
- Insert a Radio into the bottom of the form.
- Configure accordingly.



Note: Value is **CASE-SENSITIVE**. **Check** your process design **transition conditions** to confirm.

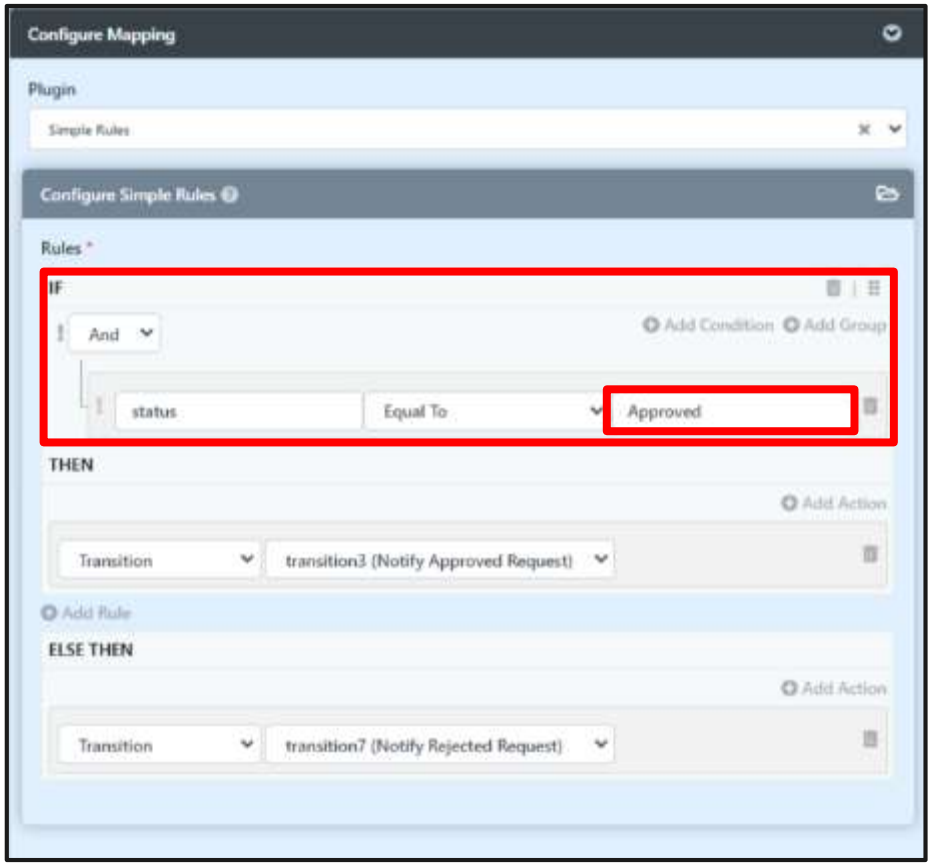
Radio Button Options

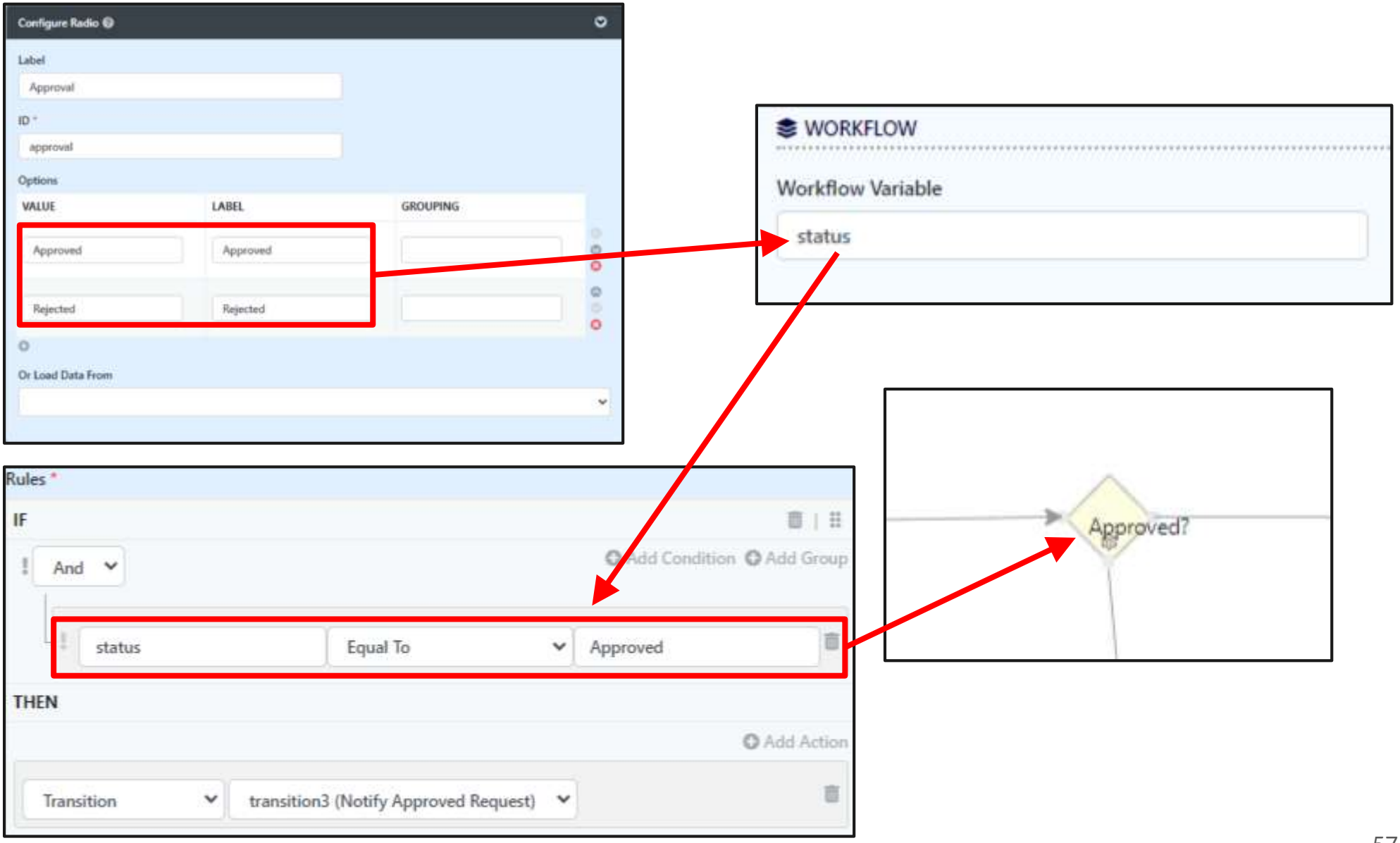
- Scroll down to the **Advanced Options** section in the **Property Editor** and set the **Workflow Variable** to “status”.
- Upon submission of this form, value defined here will also set the respective workflow variable.



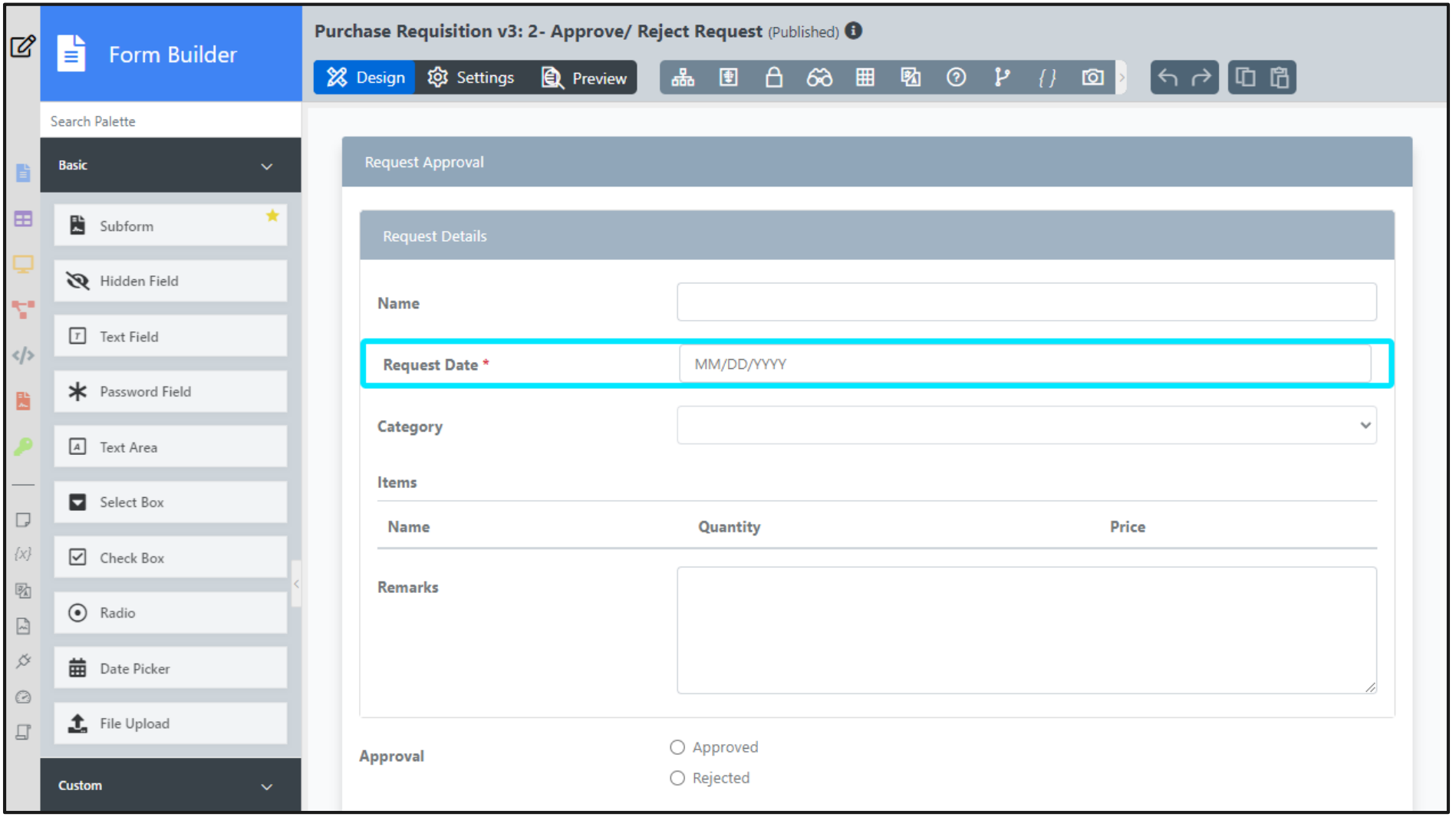
Process Review

- Recall what we have declared and set in the route's conditions.

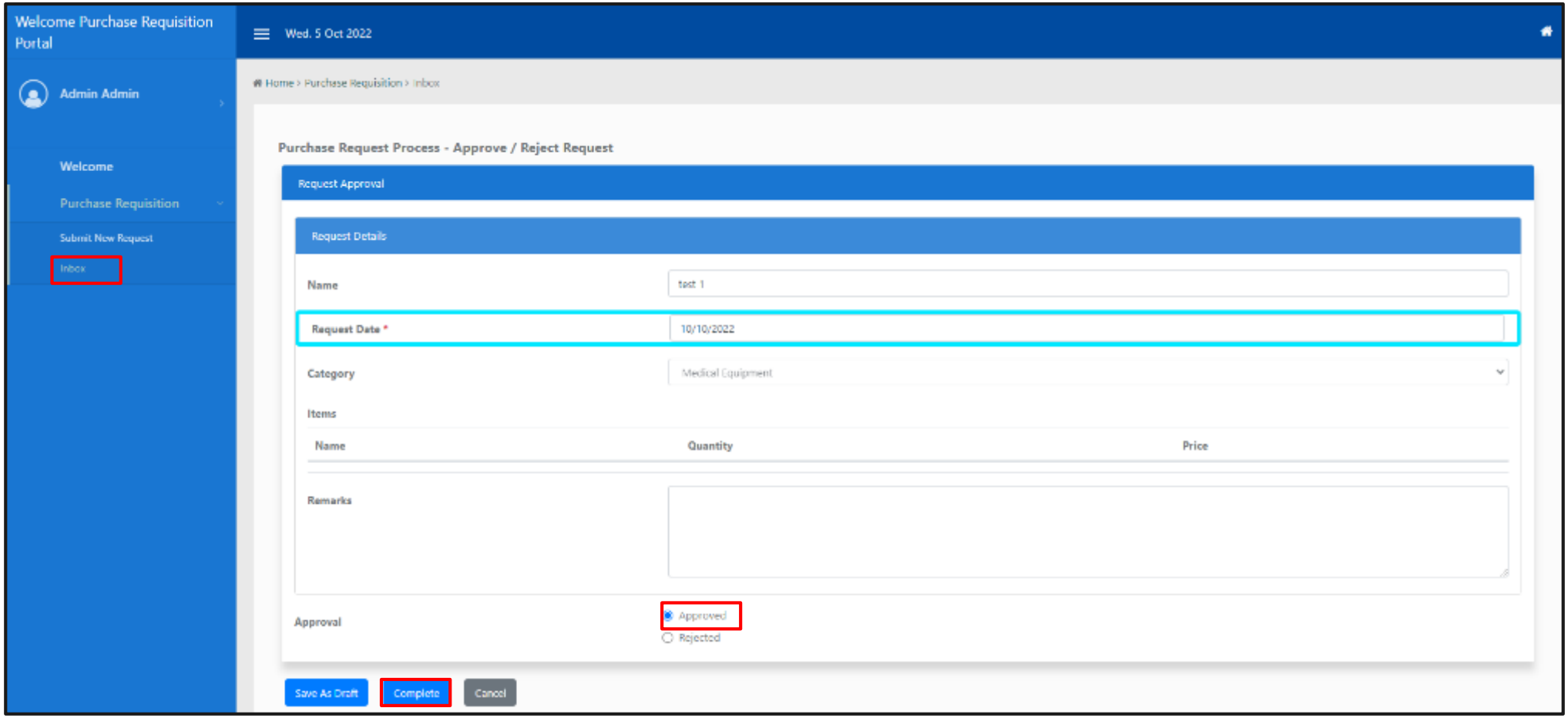



Configure Radio
Label
Approval
ID *
approval
Options
VALUE
LABEL
GROUPING
Approved
Approved
Rejected
Rejected
Or Load Data From
WORKFLOW
Workflow Variable
status
Rules *
IF
And
Add Condition
Add Group
status
Equal To
Approved
THEN
Add Action
Transition
transition3 (Notify Approved Request)
Approved?

Request Approval Form



Continue With the Assignment



Joget

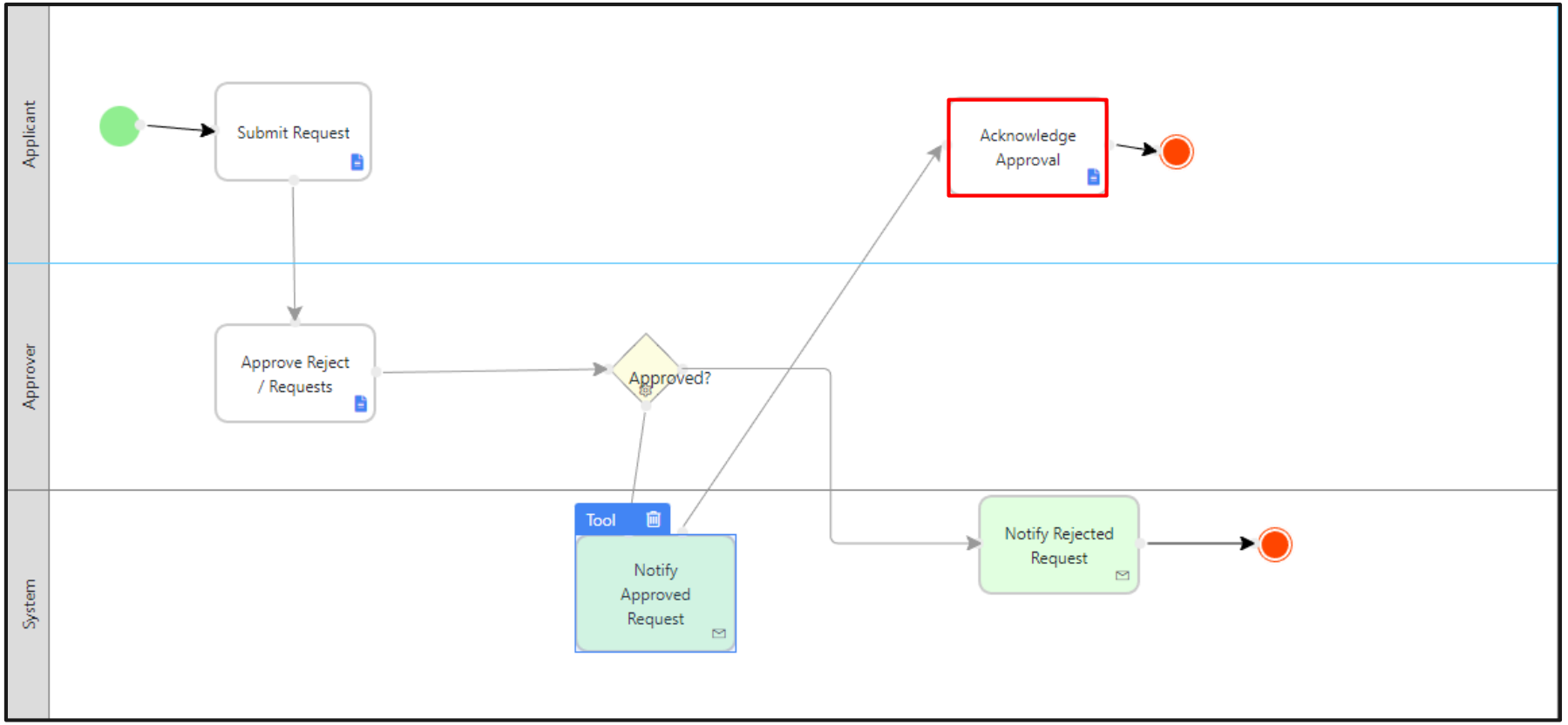
Exercise

- Refresh your memory on module 3 - designing process!

  Design Form for "**Acknowledge Approved**" activity

  - Add an activity to your purchase request process, after the email tool in the "approved" lane.
  - Create a new Form named "**3-Acknowledge Approved**" form
  - Map the form to "**Acknowledge Approved**" activity.
  - Point it back to the **same** table used before.
  - In the form design, add a "Subform" and refer it to the "**2-Approve / Reject Request**" form.

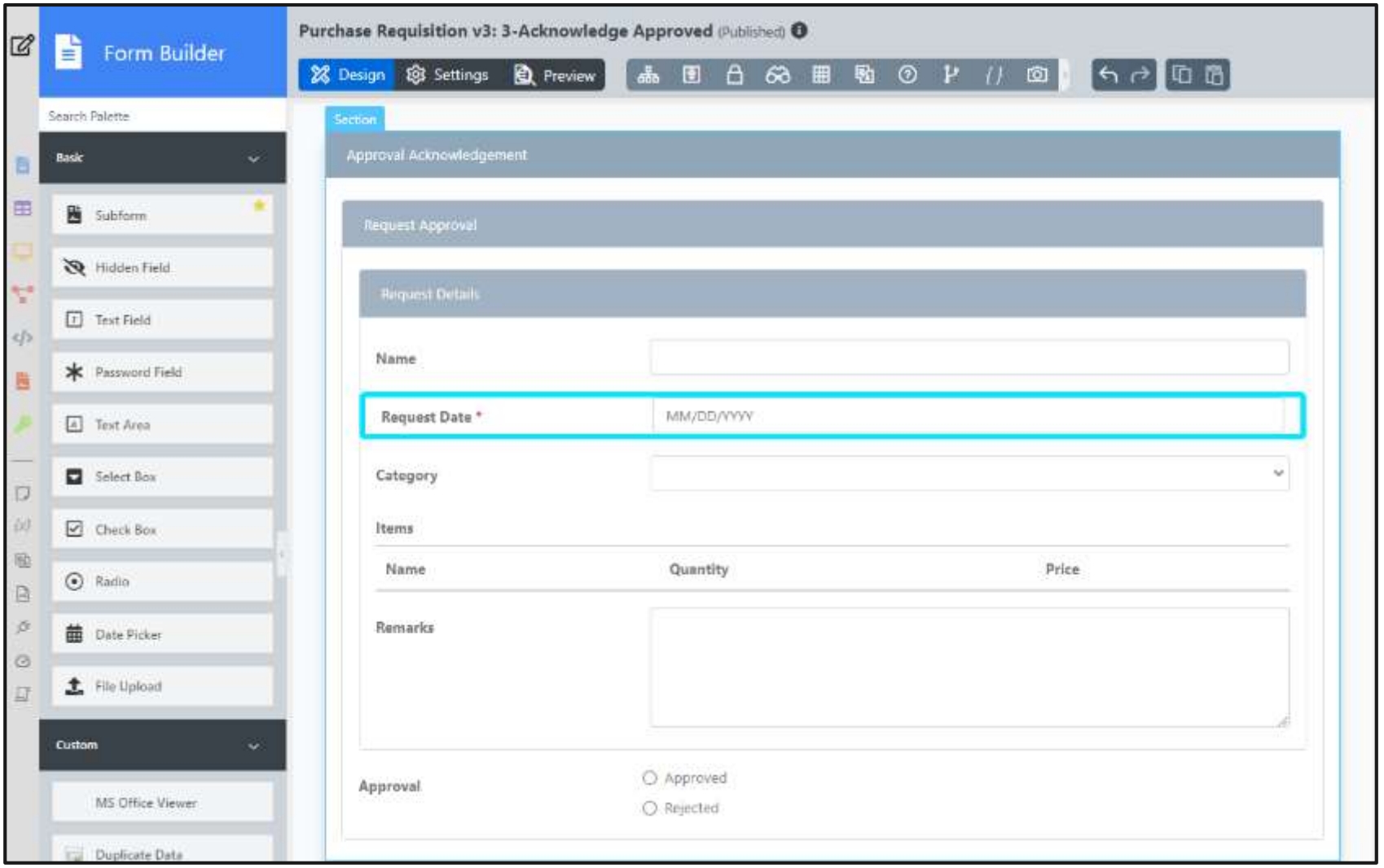
“Acknowledge Approved” Activity Added in Process



Note: Pay attention to **WHERE** you are placing the “Acknowledge Approved” activity.

Joget

Acknowledge Approved Form



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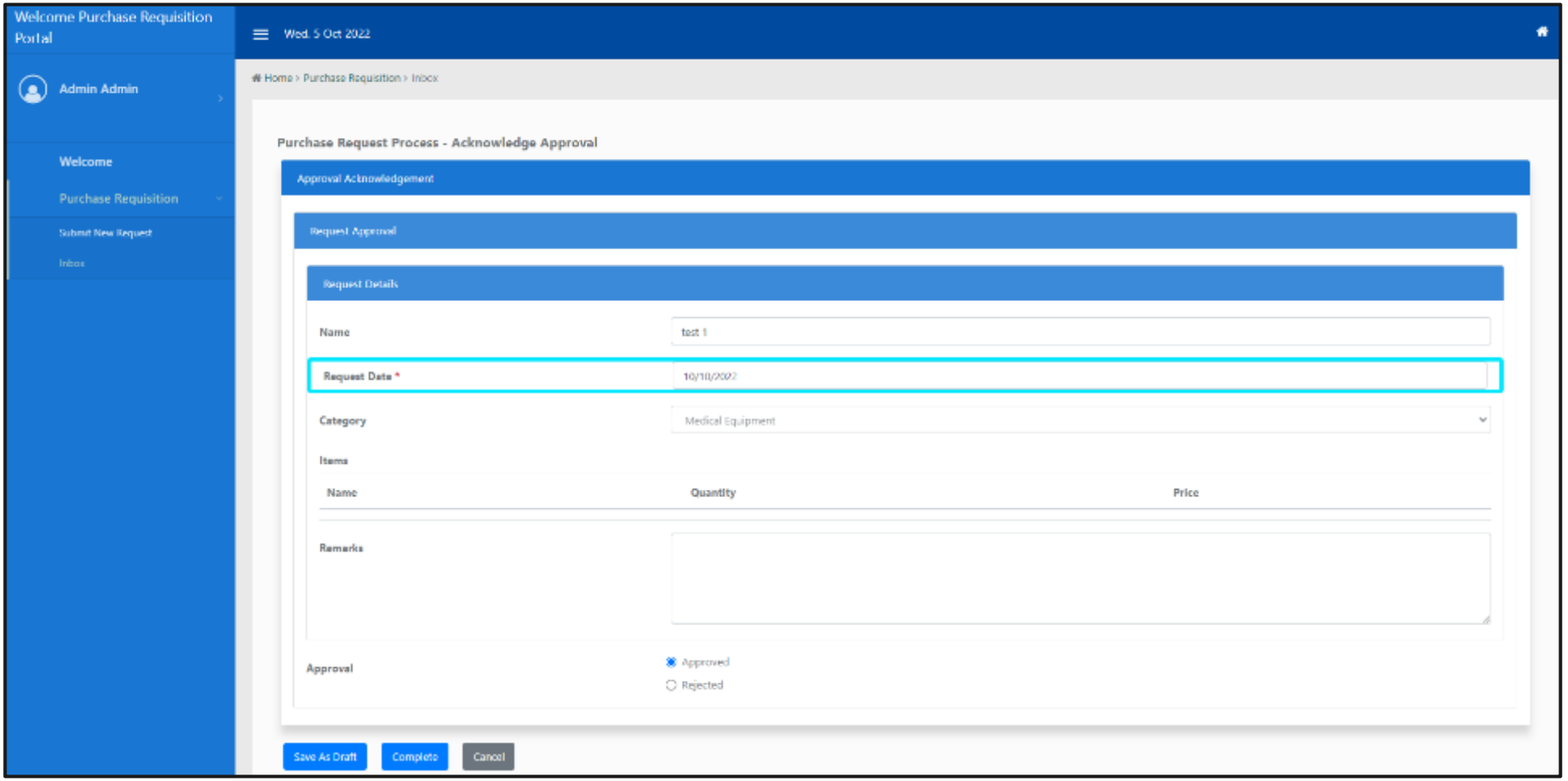
Complete the Process Cycle

- Go back to your Inbox.
- Open "**Acknowledge Approved**" assignment. Verify the form created and complete the process.

Complete the Process Cycle



Joget

Discussion

- Curious on where the form data is actually stored?
  Use your preferred SQL Client and try to look for the form data submitted earlier.

Joget

Just In Case...

- You can download the base Purchase Requisition app - **5.3.jwa** to start 'playing around' with it.

Joget

Chapter Review

- Learn about Subform.
- Control flow of process using **Workflow Variable** mapping via the **Form Field**.

Module Review

We have learnt to:

1. Create Form and assign it to Process Activity with basic Form Elements.
2. Understand the Subform concept.
3. Map Form Field to Workflow Variable for routing purpose.
4. Verify Process with the Form attached.

Recommended Further Learning

- Improving your Form design and Presentation.
- Creating a List based on the Forms designed.

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