

Joget DX 8

Designing your first Form

 <http://facebook.com/jogetworkflow>

 <http://twitter.com/jogetworkflow>

Prerequisites

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

Content

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



Chapter 1

Introduction to Form Builder



Apps

Progressive Web Apps
Various Form Factors



Customer
Onboarding



Supplier
Portal



Loan
Application



Service Request
Portal



Joget
Marketplace



Development

Simple, Visual,
Drag and Drop.



Platform

Open, Flexible and
Extensible.



Infrastructure

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

Application Server



Database



Operating System



Containers and Cloud



Integration

Easy integration with
various enterprise
technologies.





Apps

Progressive Web Apps
Various Form Factors



Customer
Onboarding



Supplier
Portal



Loan
Application



Service Request
Portal

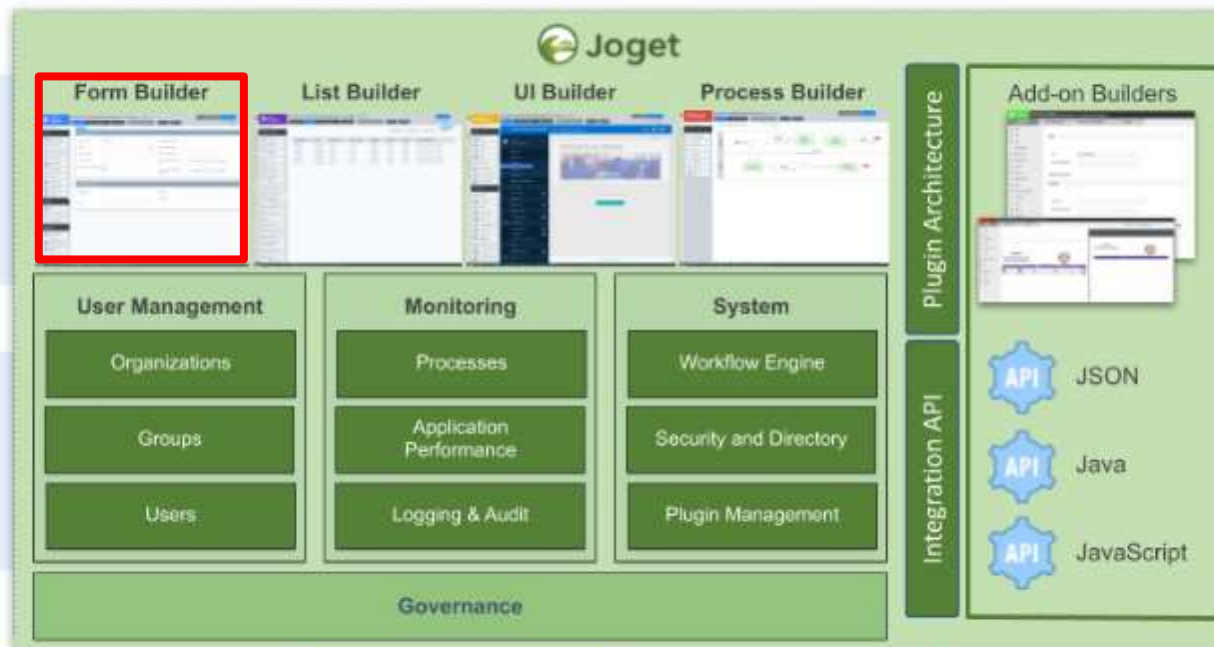


Joget Marketplace



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Integration

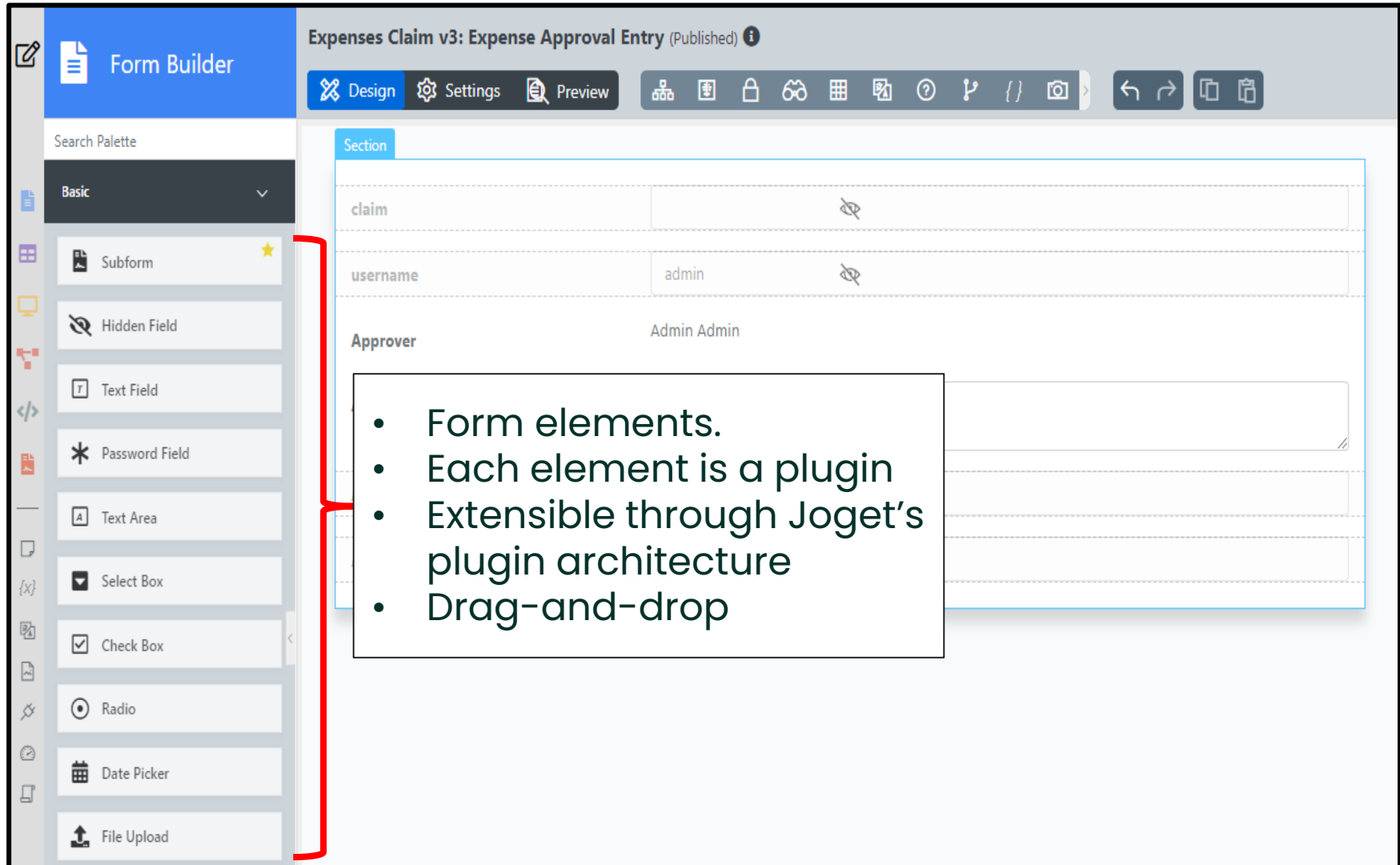
Easy integration with
various enterprise
technologies.



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.

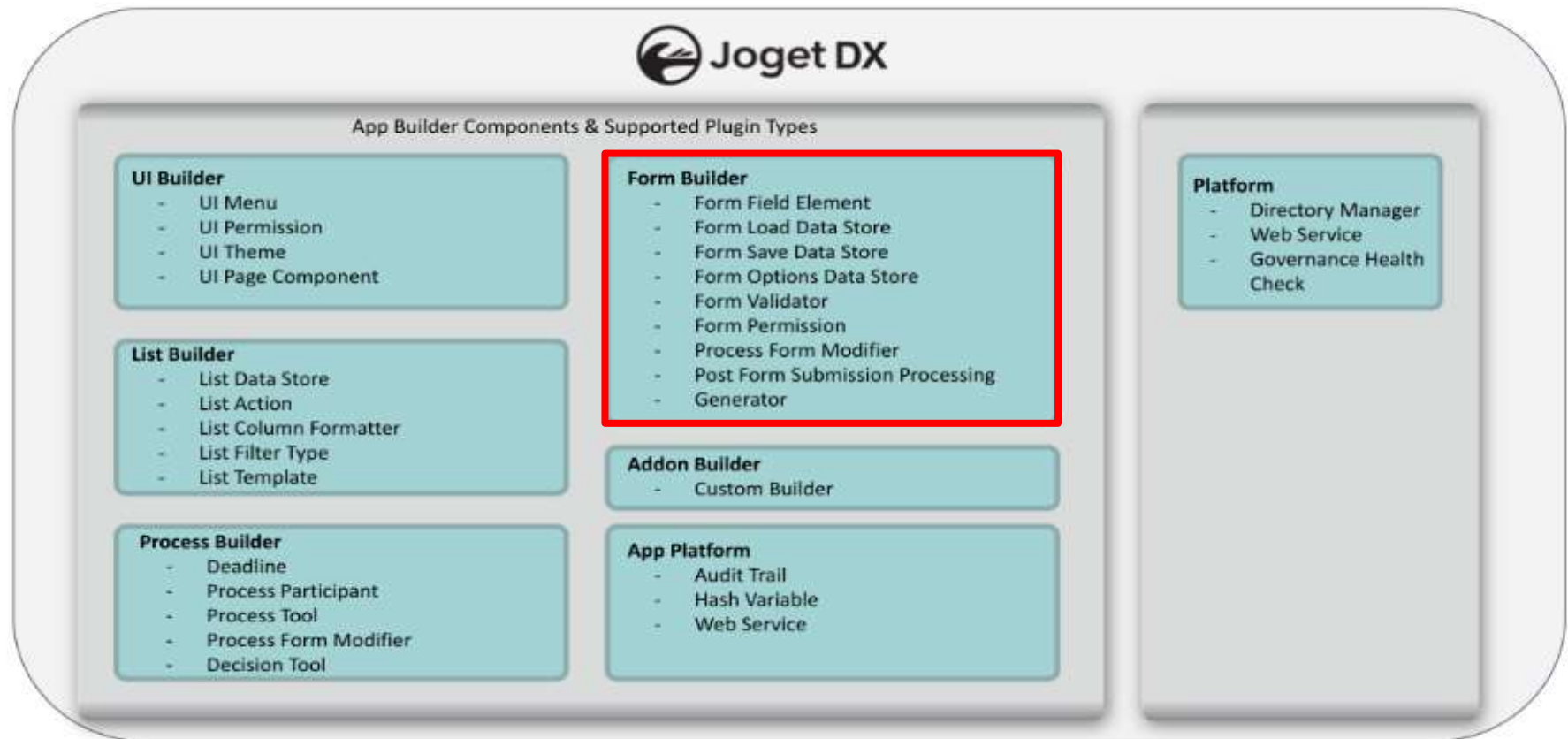
Form Builder



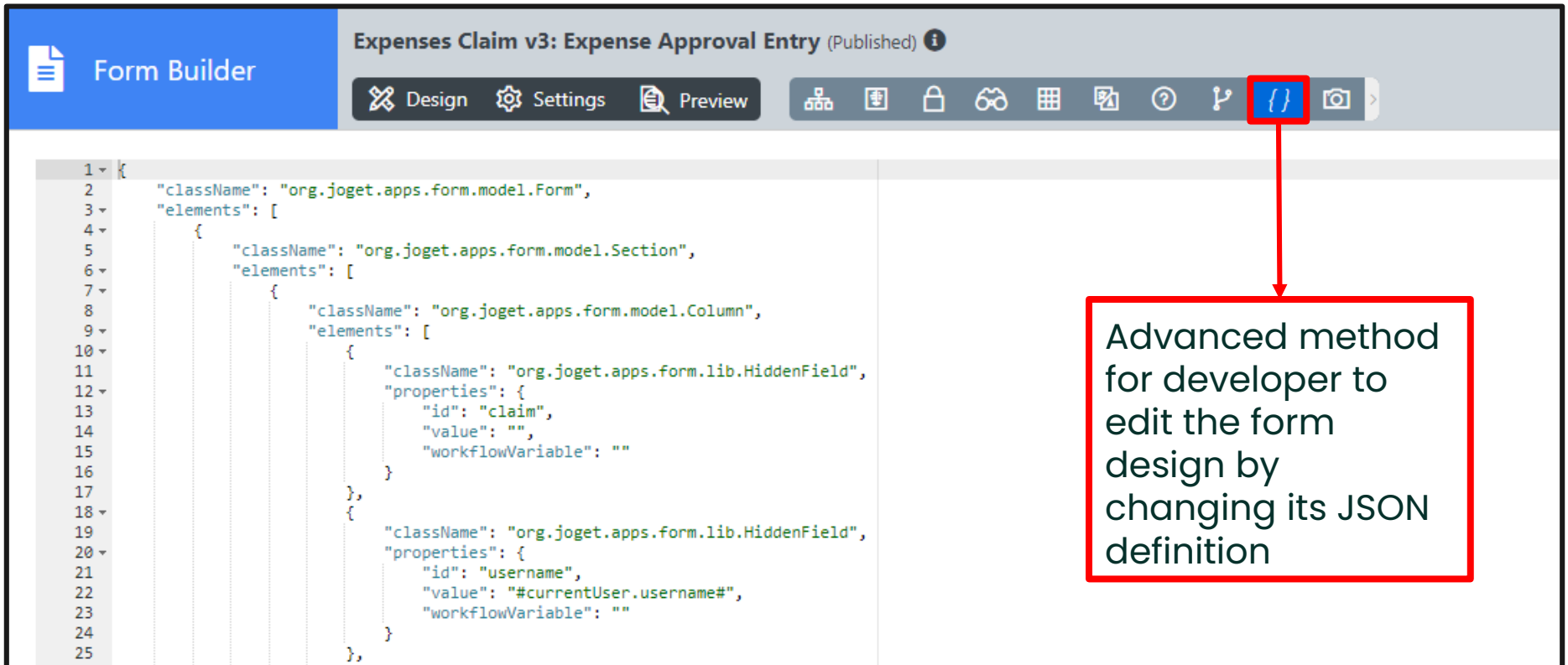
The screenshot displays the Joget Form Builder interface. On the left is a 'Search Palette' with a 'Basic' category selected, listing various form elements: Subform, Hidden Field, Text Field, Password Field, Text Area, Select Box, Check Box, Radio, Date Picker, and File Upload. A red bracket highlights the 'Text Field' and 'Password Field' elements. The main workspace shows a form titled 'Expenses Claim v3: Expense Approval Entry (Published)'. The form includes a 'Section' header, a 'claim' field, a 'username' field with the value 'admin', and an 'Approver' field with the value 'Admin Admin'. A text box is overlaid on the form, containing the following list:

- Form elements.
- Each element is a plugin
- Extensible through Joget's plugin architecture
- Drag-and-drop

Plugin Types



Form Builder



The screenshot displays the Joget Form Builder interface. The top bar shows the title 'Expenses Claim v3: Expense Approval Entry (Published)' and a toolbar with icons for Design, Settings, Preview, and a JSON editor icon (highlighted with a red box and a red arrow). The main area shows a JSON definition for the form structure, including nested elements like 'Section', 'Column', and 'HiddenField'.

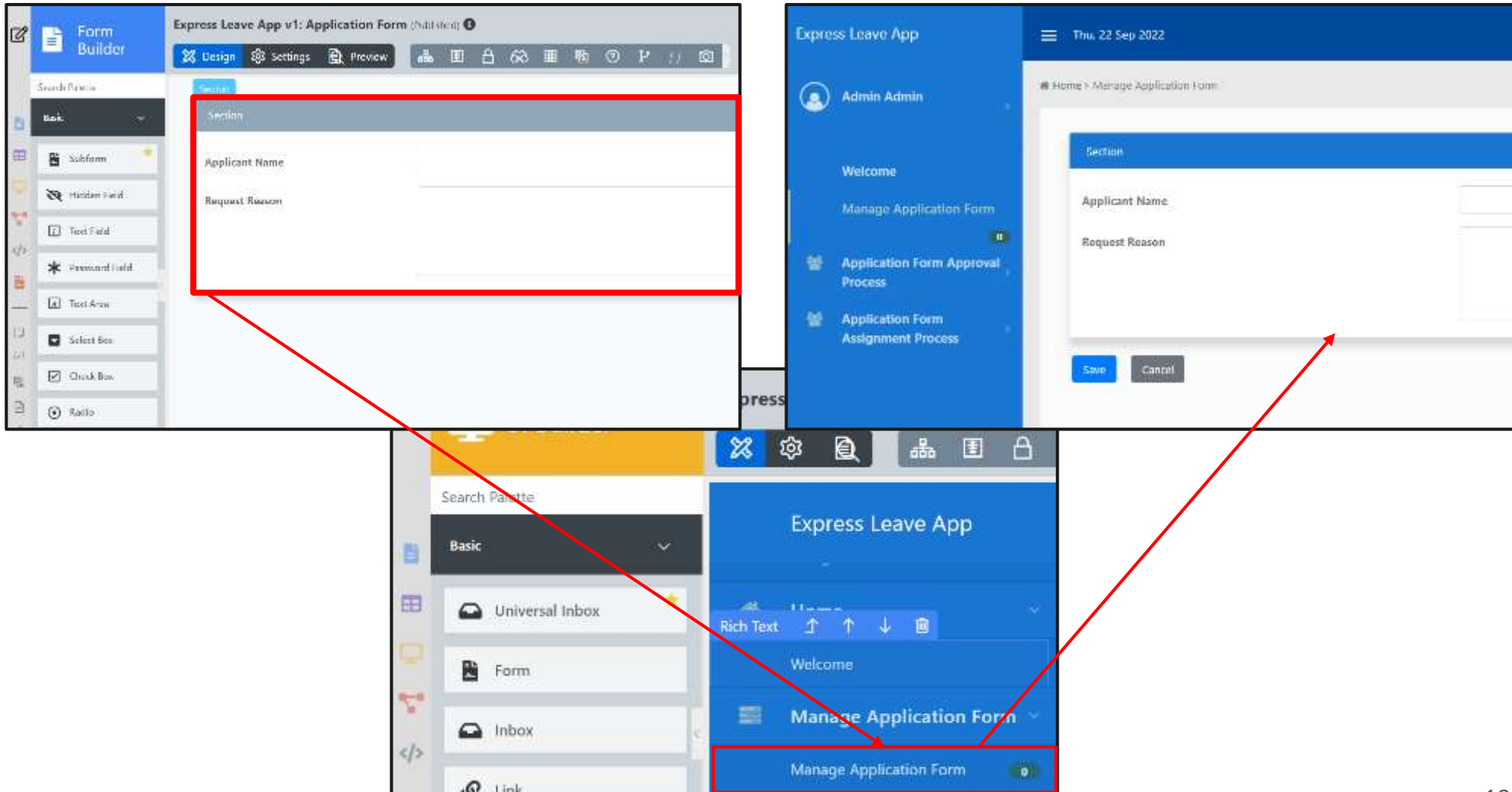
```
1 {  
2   "className": "org.joget.apps.form.model.Form",  
3   "elements": [  
4     {  
5       "className": "org.joget.apps.form.model.Section",  
6       "elements": [  
7         {  
8           "className": "org.joget.apps.form.model.Column",  
9           "elements": [  
10            {  
11              "className": "org.joget.apps.form.lib.HiddenField",  
12              "properties": {  
13                "id": "claim",  
14                "value": "",  
15                "workflowVariable": ""  
16              }  
17            },  
18            {  
19              "className": "org.joget.apps.form.lib.HiddenField",  
20              "properties": {  
21                "id": "username",  
22                "value": "#currentUser.username#",  
23                "workflowVariable": ""  
24              }  
25            },  
26          ]  
27        },  
28      ]  
29    }  
30  ]  
31 }
```

Advanced method for developer to edit the form design by changing its JSON definition

Where and How Form is used?

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

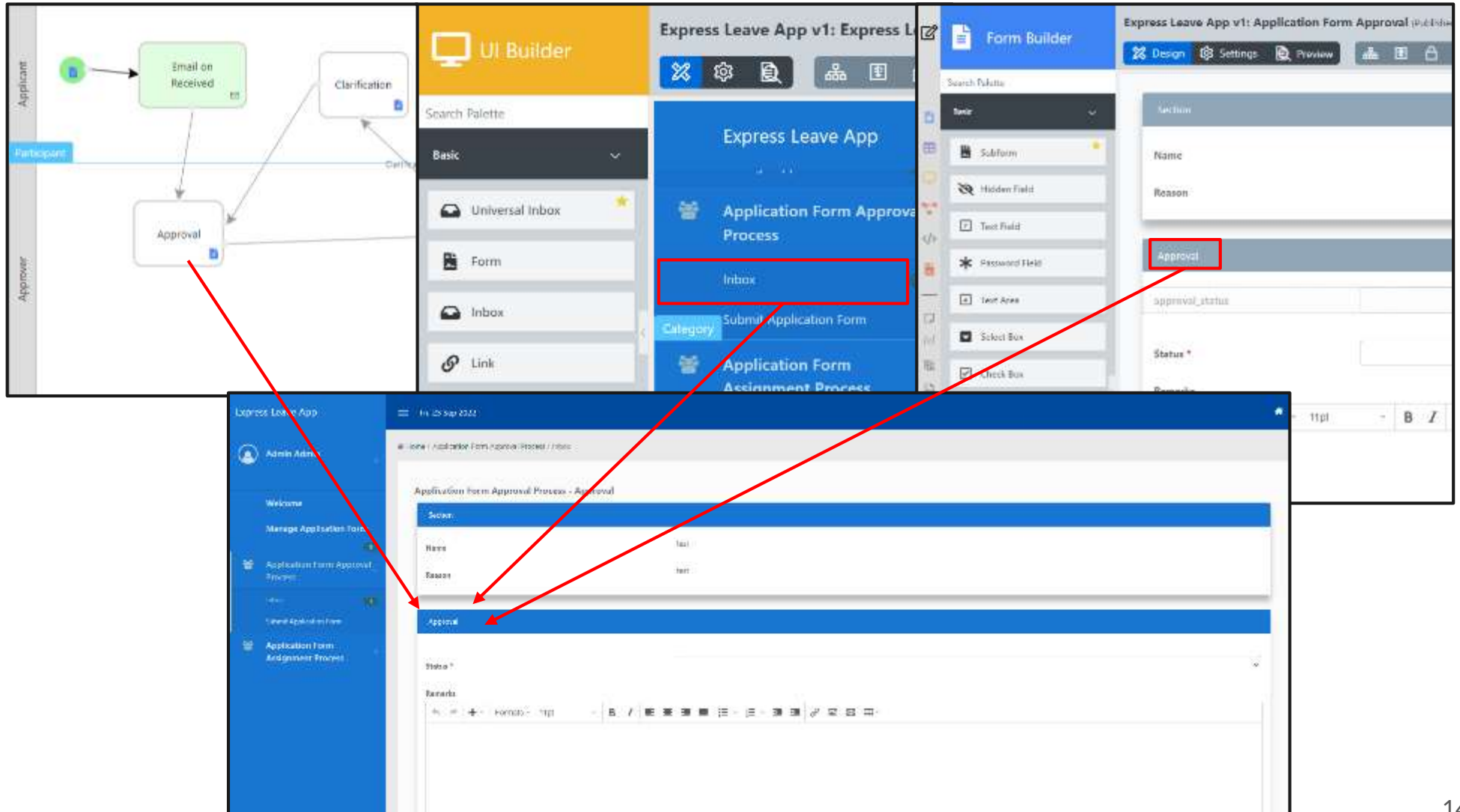
Form or CRUD in UI



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



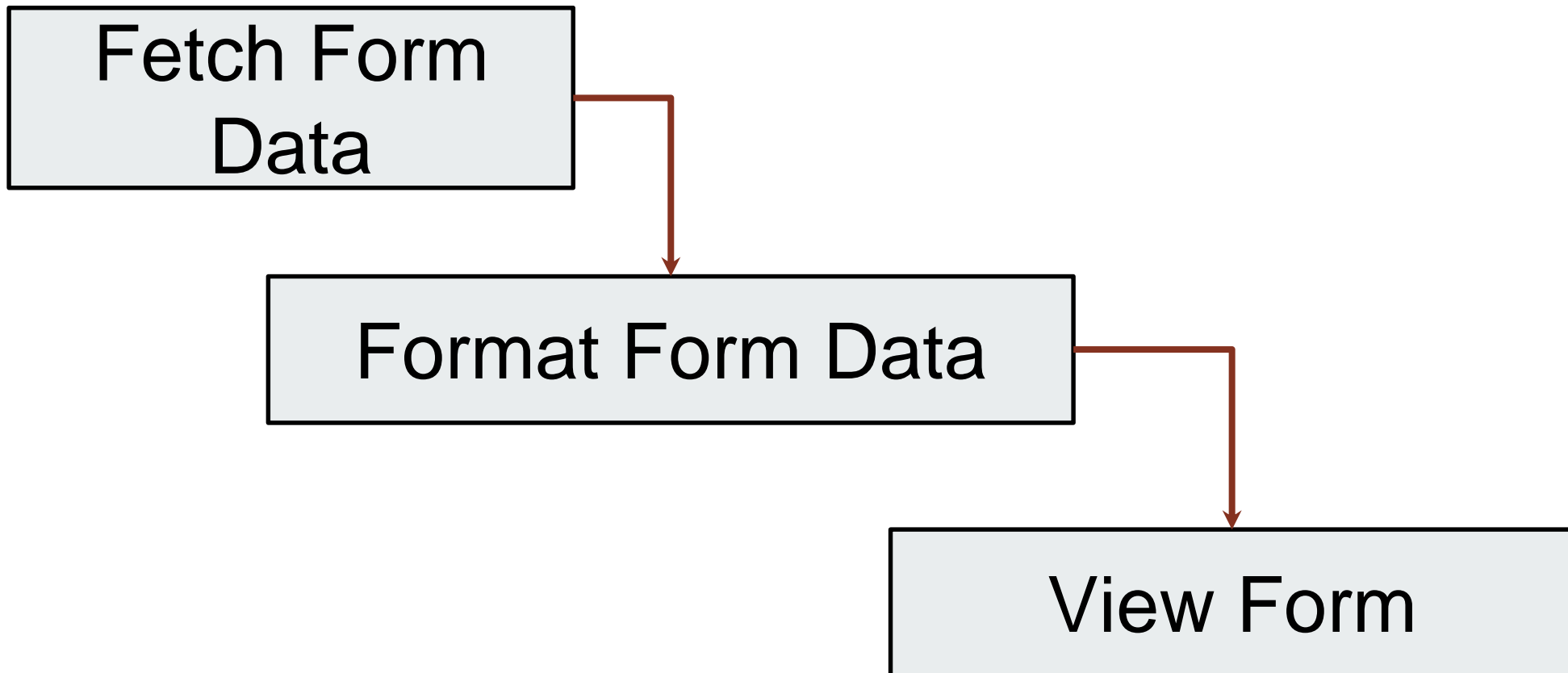
The image illustrates the integration of workflow, UI, and form design in Joget. It is divided into three main sections:

- Workflow Designer (Top Left):** Shows a process flow starting with 'Email on Received', leading to 'Approval', and then 'Clarification'. The 'Approval' step is highlighted with a red box and an arrow pointing to the UI Builder.
- UI Builder (Top Middle):** Displays the 'Express Leave App v1: Express L' interface. The 'Inbox' component is highlighted with a red box and an arrow pointing to the Form Builder.
- Form Builder (Top Right):** Shows the 'Express Leave App v1: Application Form Approval' form. The 'Approval' section is highlighted with a red box and an arrow pointing to the final form view.
- Form View (Bottom):** Shows the final 'Application Form Approval Process - Approval' form. The 'Approval' section is highlighted with a red box and an arrow pointing to the final form view.

Red arrows indicate the flow of data and design from the workflow designer to the UI Builder, and then to the Form Builder and the final form view.

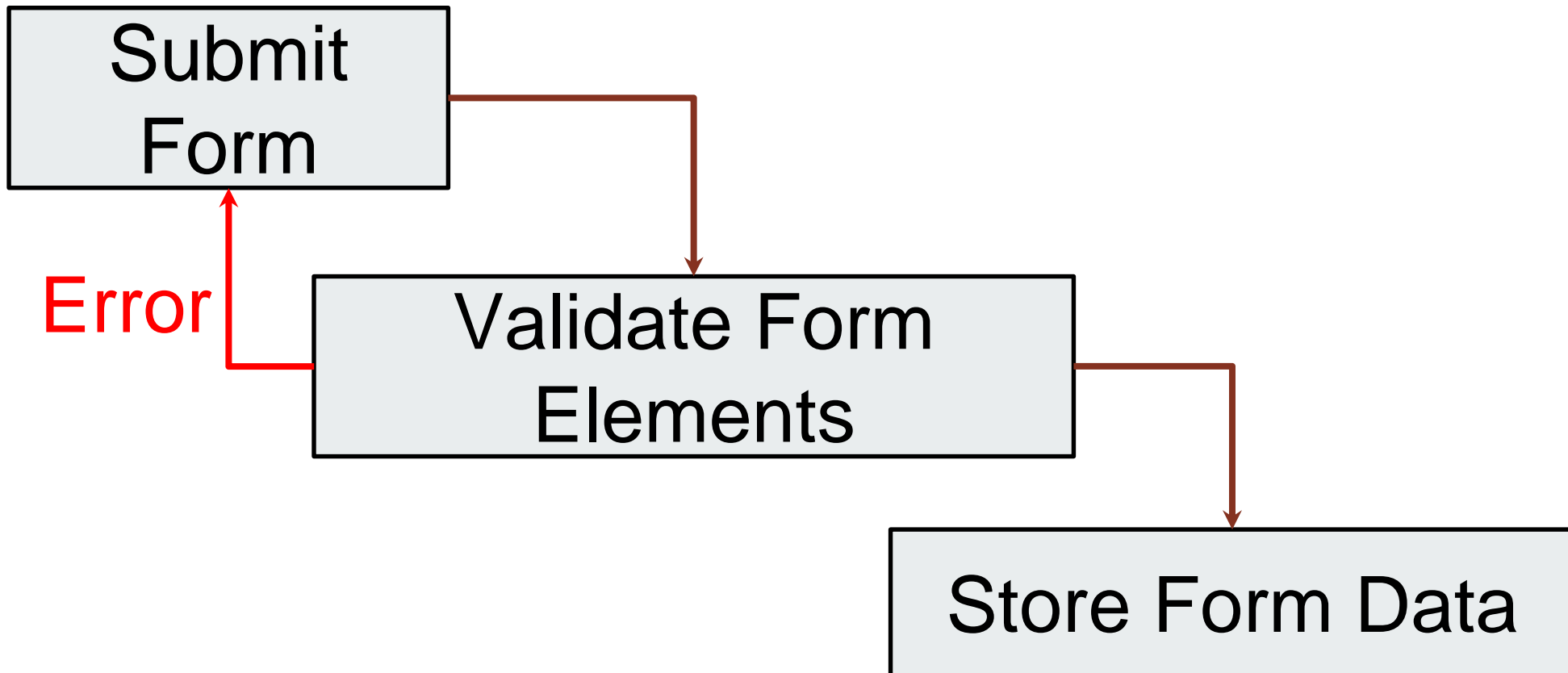
Viewing a Form

- 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.

Chapter Review

- General understanding on how Form and Form Builder works.



Chapter 2

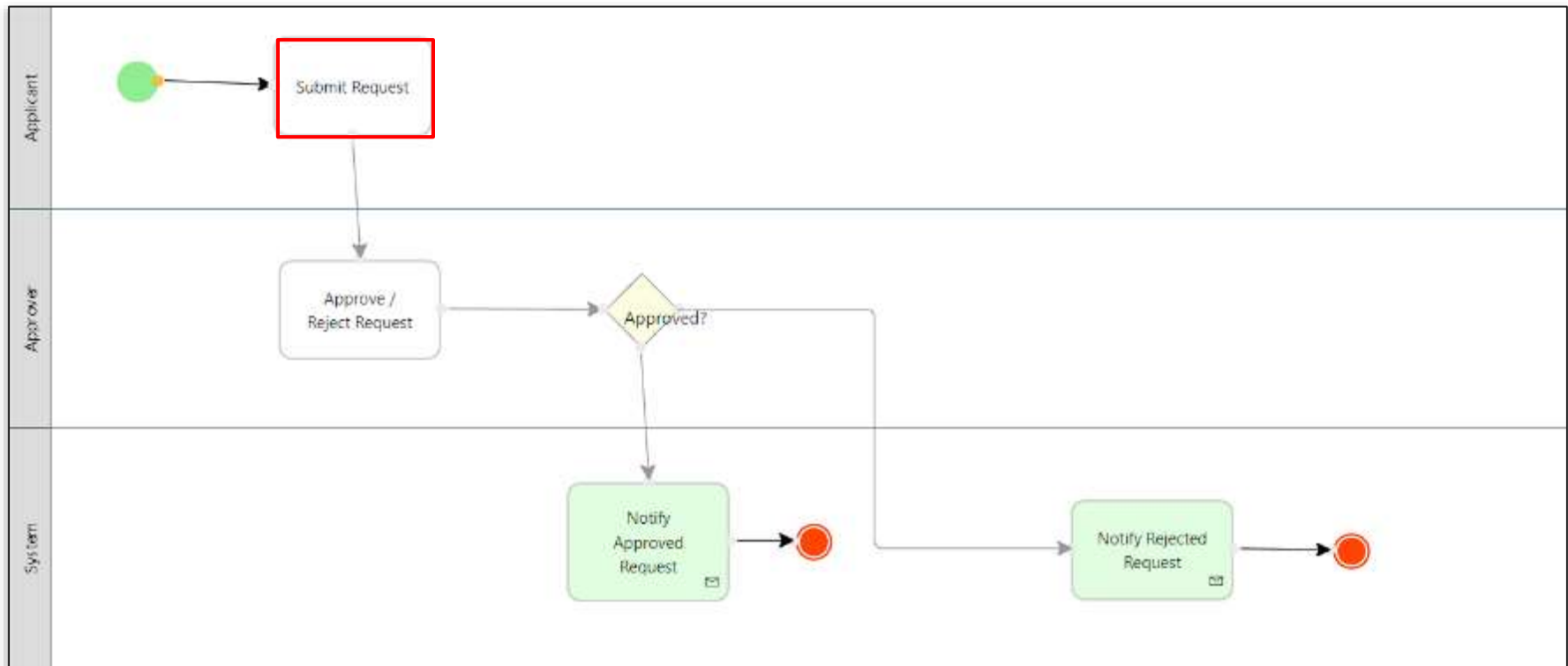
Designing Your First Form

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.

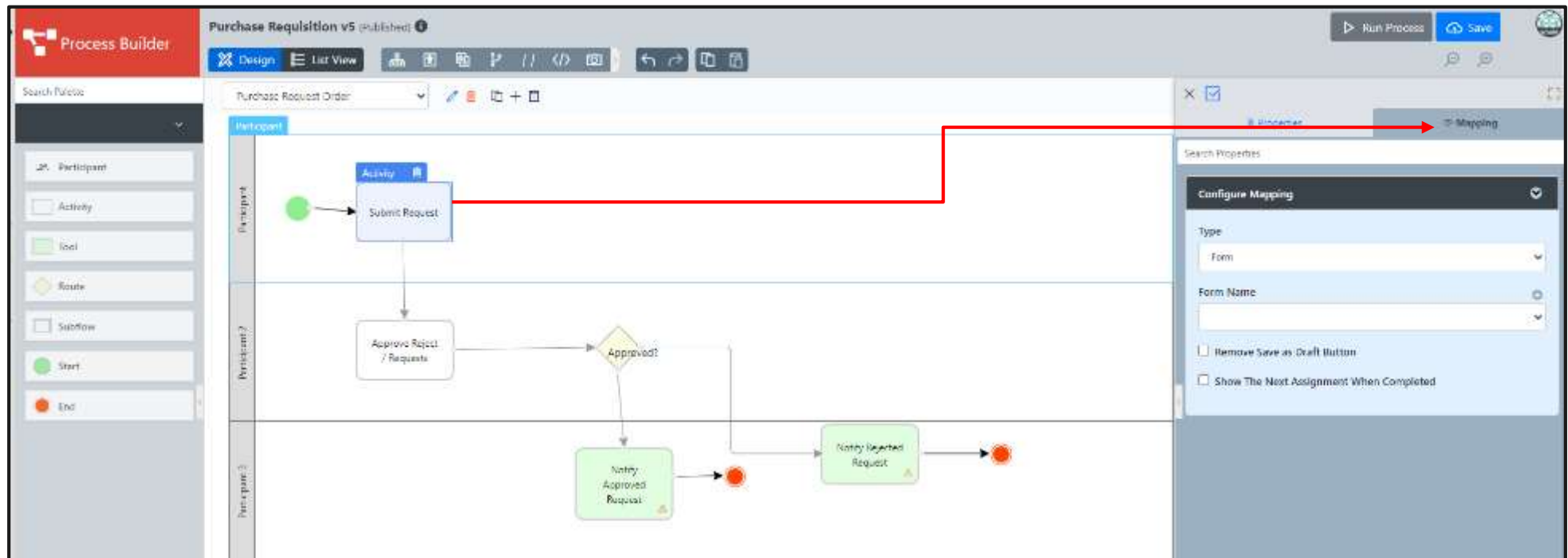
Association With the Process Flow

- 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.



The screenshot displays the Joget Process Builder interface for a process named "Purchase Requisition v3 (Published)". The main workspace shows a list of activities under the "Activity" tab. The "Submit Request (submitRequest)" activity is highlighted with a red border. To the right, the "Properties" panel is open, and the "Mapping" tab is selected, indicated by a red arrow. The "Mapping" tab shows the "ID" property set to "submitRequest" and the "Name" property set to "Submit Request".

Process Builder Interface:

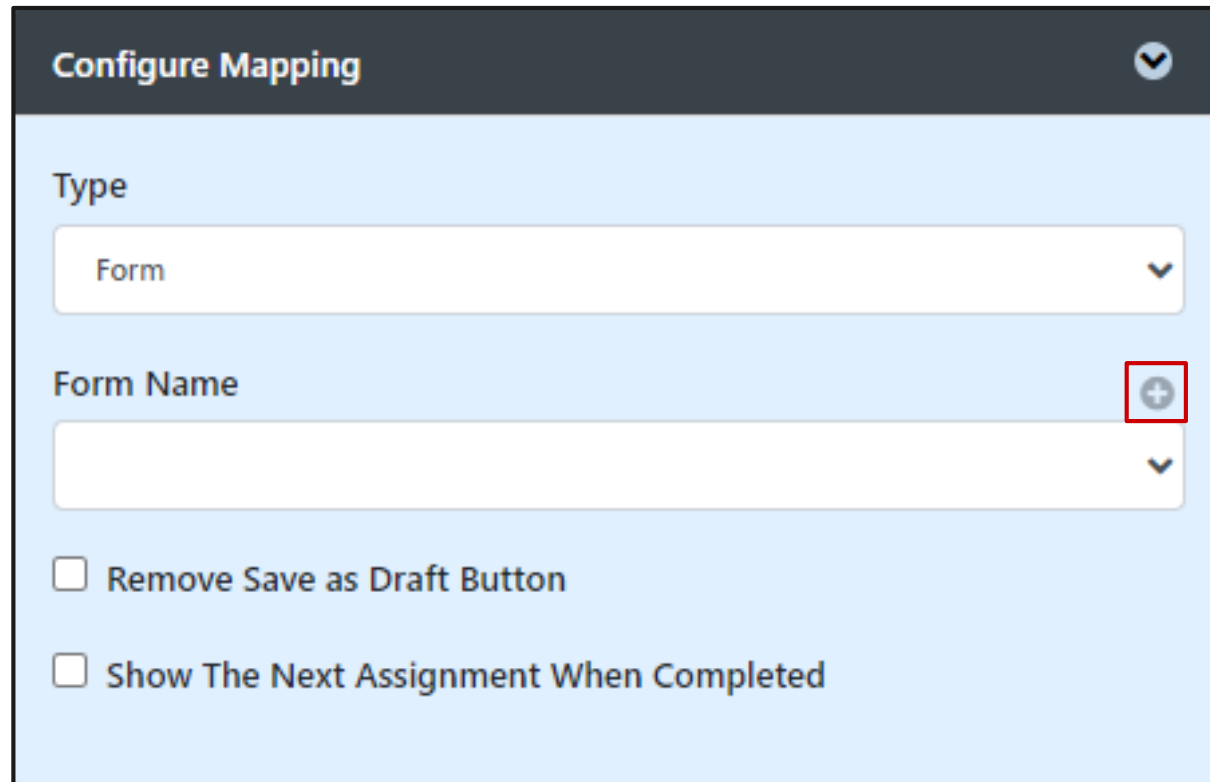
- Header:** Process Builder, Purchase Requisition v3 (Published)
- Toolbar:** Design, List View, and various tool icons.
- Activity List:**
 - Submit Request (submitRequest)
 - Name: Submit Request
 - Form: 1-Submit Request
 - Acknowledge Approval (acknowledgeApproval)
 - Name: Acknowledge Approval
 - Form: 3-Acknowledge Approved

Properties Panel (Mapping Tab):

- Search Properties:** Search Properties
- Activity Properties:**
 - ID: submitRequest
 - Name: Submit Request
- Deadlines:** Deadlines

Add/Edit Form

- Click on the “+” to create a new form.



Configure Mapping

Type

Form

Form Name

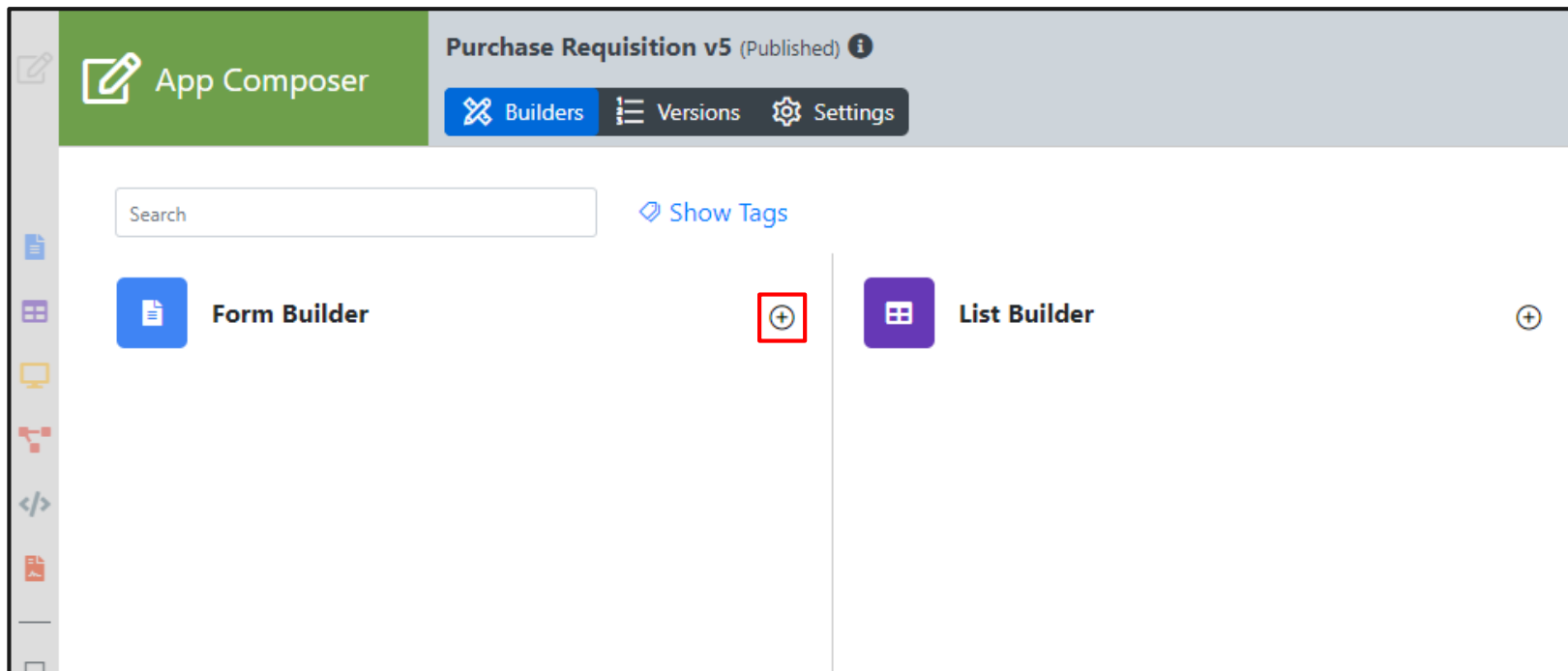
+

☐ Remove Save as Draft Button

☐ Show The Next Assignment When Completed

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

Numbered form name according to process flow

CREATE NEW FORM

FORM DETAILS

a-z, A-Z, 0-9, _

Form ID *

submitRequest

Form Name *

1-Submit Request

Table Name *

app_fd_purchase_requests

Description

Assign a prefix for every app

Table name with prefix

[Show Advanced Options](#)

Save

Cancel

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.

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>

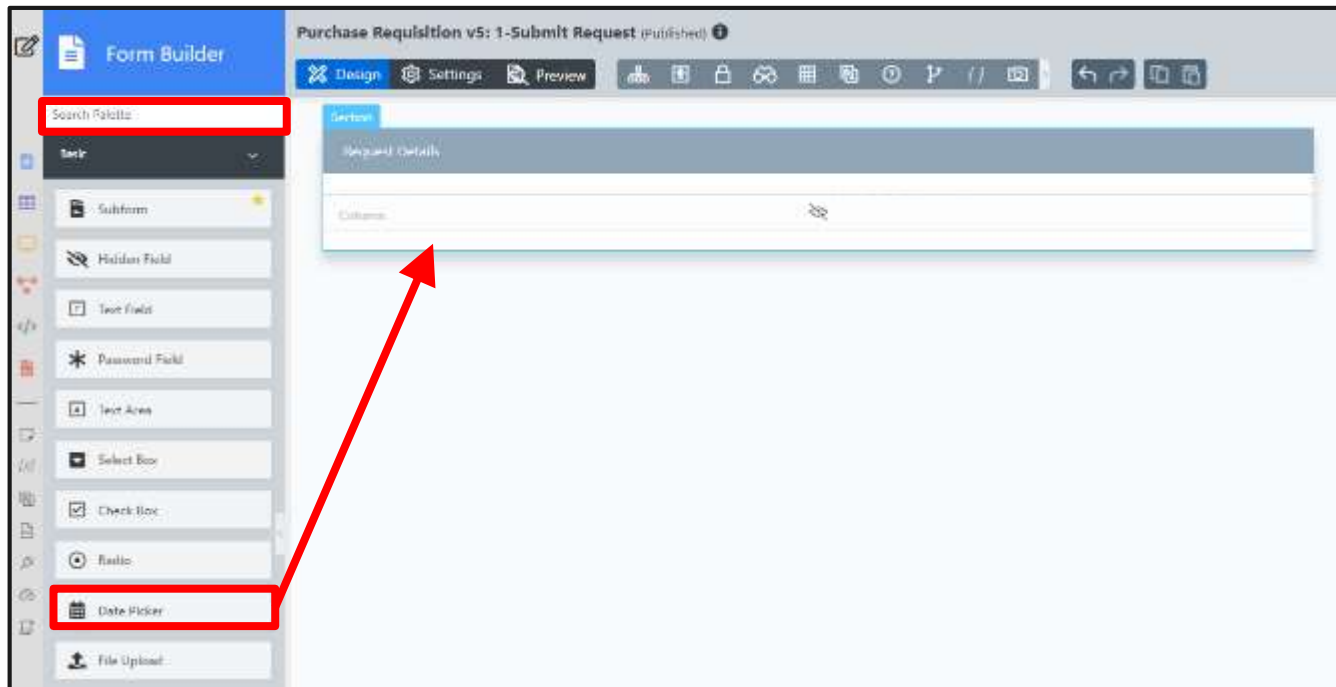
Edit Section

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

The screenshot illustrates the process of editing a form section in Joget Designer. On the left, the 'Design' view shows a form titled 'Purchase Requisition v5: 1-Submit Request' with a 'Request Details' section. A red line connects this section to the 'Configure Section' dialog in the right pane. The dialog shows the 'Label' field set to 'Request Details' and the 'ID' field set to 'section1'. A callout bubble points to the 'Label' field with the text 'Purchase Request Details'.

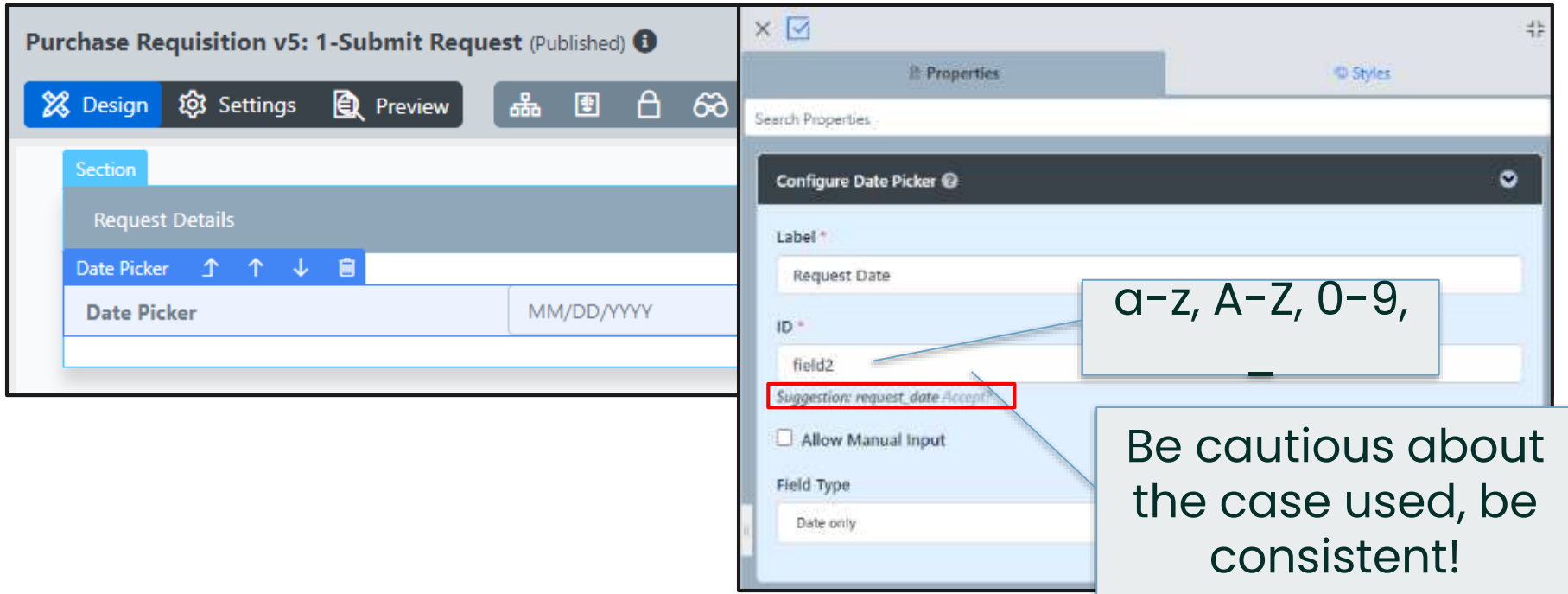
Insert Date Picker

- 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.



Purchase Requisition v5: 1-Submit Request (Published)

Design Settings Preview

Section

Request Details

Date Picker

Date Picker MM/DD/YYYY

Properties

Search Properties

Configure Date Picker

Label *

Request Date

ID *

field2

Suggestion: request_date Accept

Allow Manual Input

Field Type

Date only

a-z, A-Z, 0-9, _

Be cautious about the case used, be consistent!

Set The Date Picker as Mandatory Field

Advanced Options

DATA

Default Value

Data Format ?

yyyy-MM-dd

VALIDATION

Validator

Basic

BeanShell

Directory

Duplicate Value

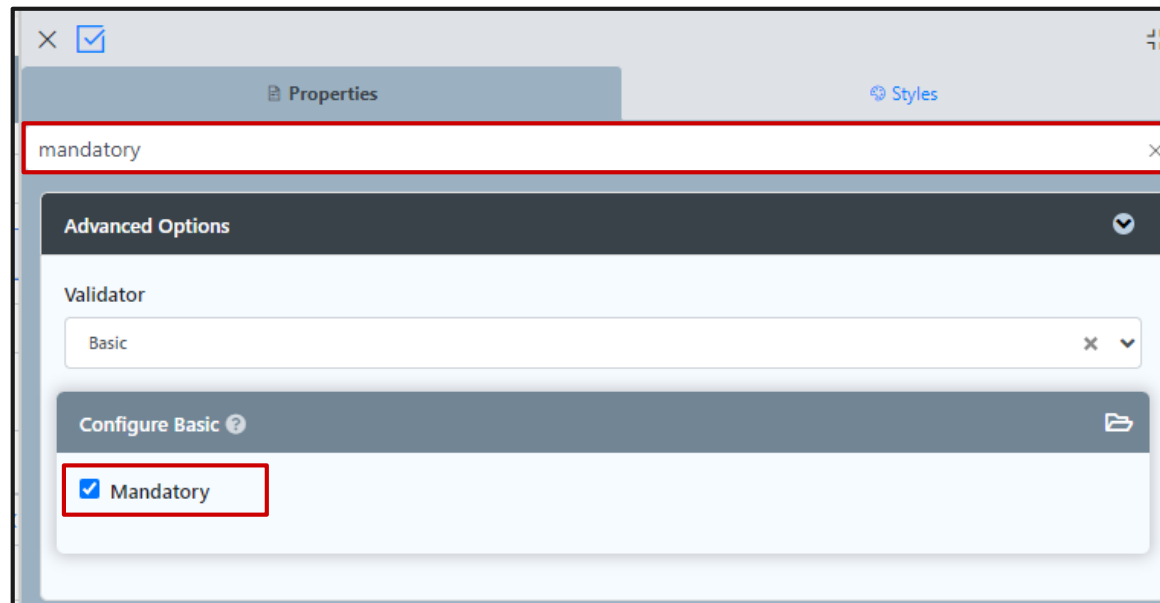
Equal Value

Form Record Locking Validator

Password

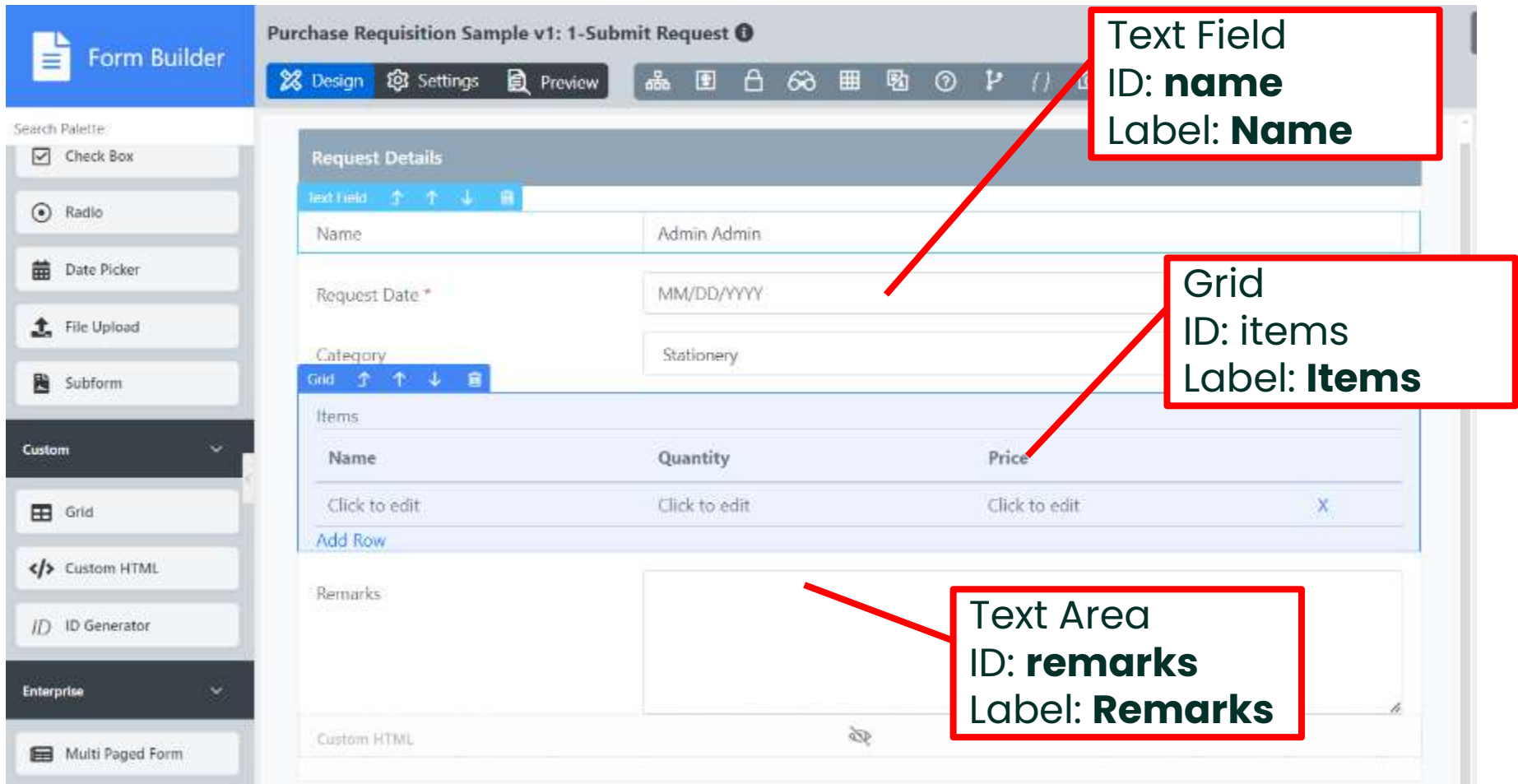
Set The Date Picker as Mandatory Field

- 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.



Form Builder

Purchase Requisition Sample v1: 1-Submit Request

Design Settings Preview

Search Palette:

- Check Box
- Radio
- Date Picker
- File Upload
- Subform
- Custom
 - Grid
 - Custom HTML
 - ID Generator
- Enterprise
 - Multi Paged Form

Request Details

Text Field
ID: **name**
Label: **Name**

Name: Admin Admin

Request Date *: MM/DD/YYYY

Category: Stationery

Grid
ID: **items**
Label: **Items**

| Name | Quantity | Price |
|---------------|---------------|---------------|
| Click to edit | Click to edit | Click to edit |

Add Row

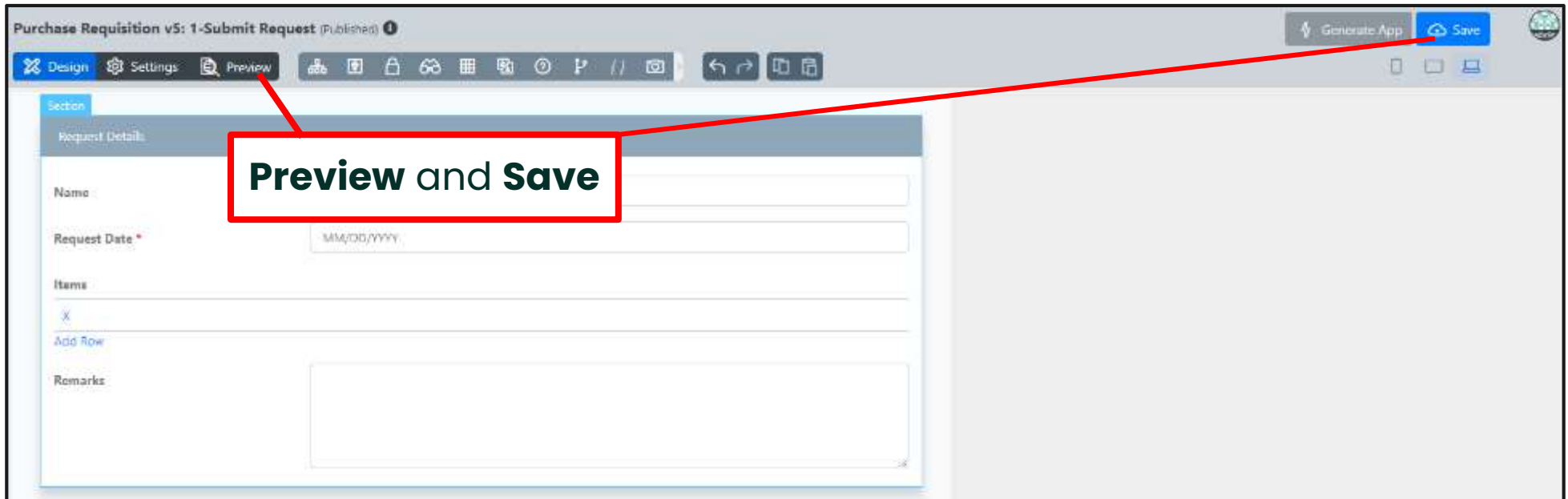
Remarks

Text Area
ID: **remarks**
Label: **Remarks**

Custom HTML

Complete the Design of “Submit Request” Form

- Preview and save.



Purchase Requisition v5: 1-Submit Request (Published)

Design Settings Preview

Section

Request Details

Name

Request Date *

MM/DD/YYYY

Items

Add Row

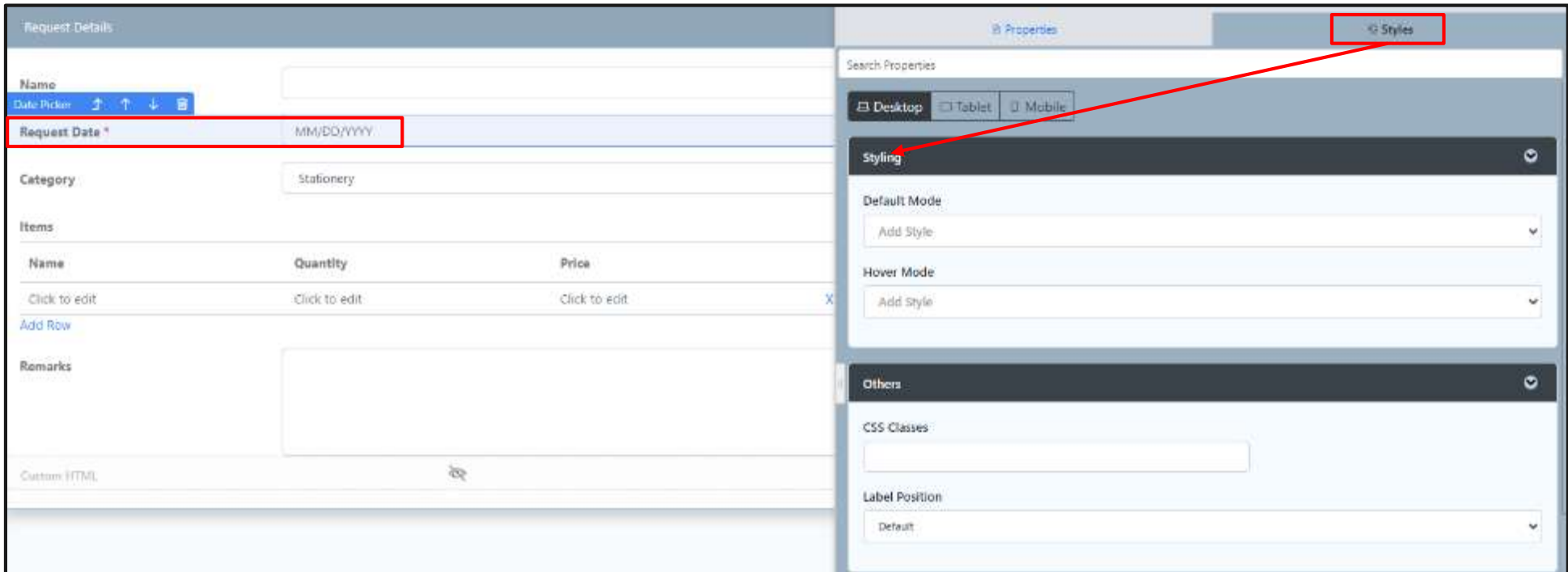
Remarks

Generate App Save

Preview and Save

Edit an Element's Style

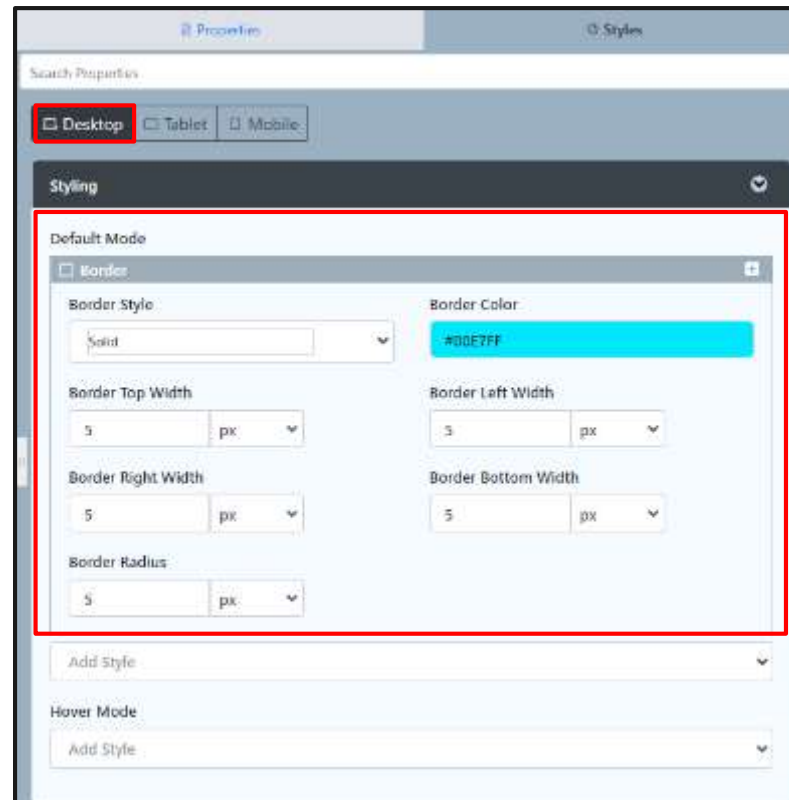
- You can control a form element's styling (CSS) directly through the form builder's **Property Editor**.
- To start, select the form element (in this case let's choose the date picker element). Then go to the **Styles** tab in the property editor.



The screenshot displays the Joget form builder interface. On the left, the 'Request Details' form is visible, featuring a 'Date Picker' element. The 'Request Date' field is highlighted with a red box. On the right, the 'Properties' panel is open, and the 'Styles' tab is selected, also highlighted with a red box. A red arrow points from the 'Styles' tab to the 'Styling' section within the panel. The 'Styling' section includes options for 'Default Mode' and 'Hover Mode', both set to 'Add Style'. Below this, the 'Others' section is visible, containing 'CSS Classes' and 'Label Position' options.

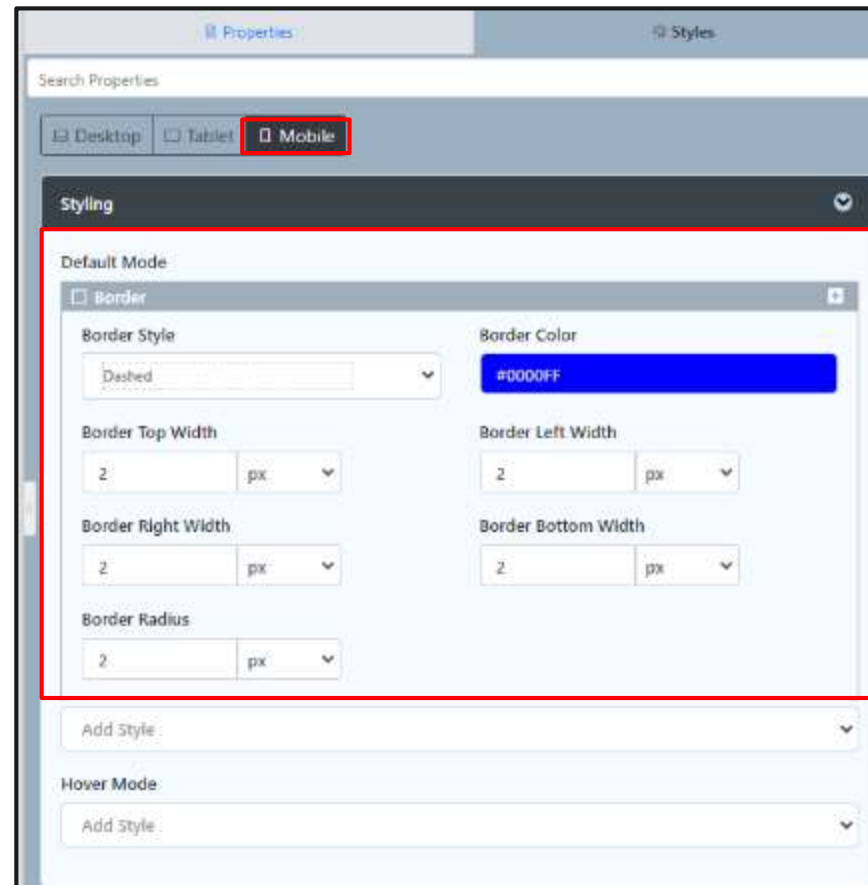
Edit an Element's Style

- 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.



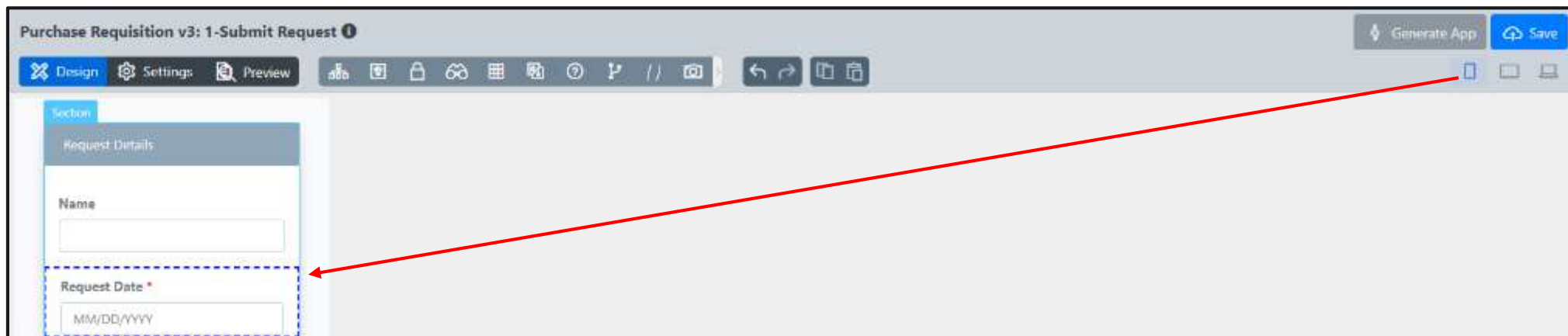
Edit an Element's Style

- 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.

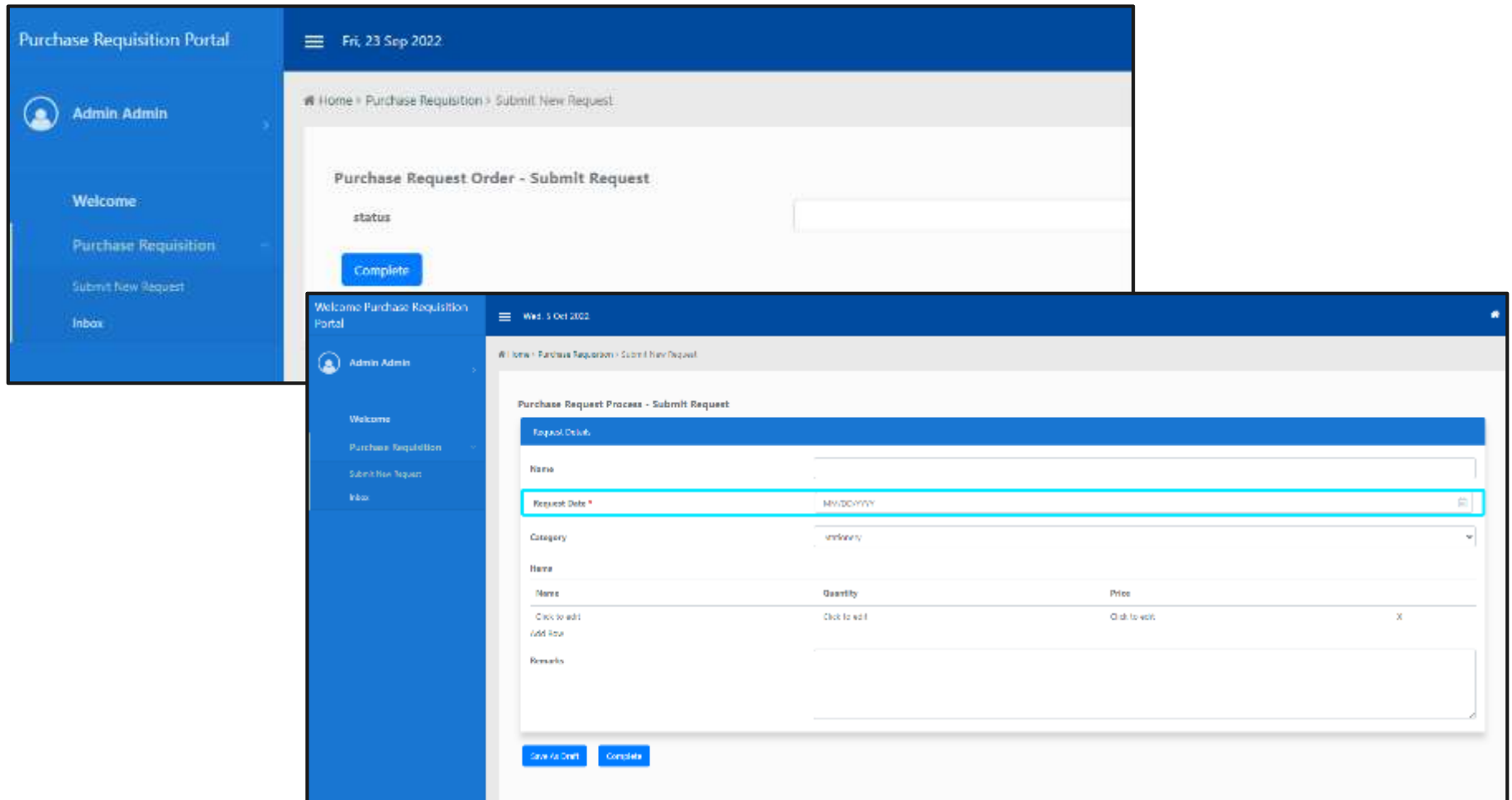


View an Element's Style

- 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?



The image displays two screenshots of the Joget Purchase Requisition Portal, illustrating the form's appearance when the 'Run Process' button is launched.

Top Screenshot (Fri, 23 Sep 2022):

- Header:** Purchase Requisition Portal, Fri, 23 Sep 2022.
- Left Sidebar:** Admin Admin, Welcome, Purchase Requisition, Submit New Request, Inbox.
- Breadcrumb:** Home » Purchase Requisition » Submit New Request.
- Form Title:** Purchase Request Order - Submit Request.
- Form Fields:** A single text input field labeled 'status'.
- Action:** A blue 'Complete' button.

Bottom Screenshot (Wed, 5 Oct 2022):

- Header:** Welcome Purchase Requisition Portal, Wed, 5 Oct 2022.
- Left Sidebar:** Admin Admin, Welcome, Purchase Requisition, Submit New Request, Inbox.
- Breadcrumb:** Home » Purchase Requisition » Submit New Request.
- Form Title:** Purchase Request Process - Submit Request.
- Form Structure:**
 - Request Details:** A section containing several input fields:
 - Name
 - Request Date (highlighted with a red border, containing '10/05/2022')
 - Category (dropdown menu, showing 'Inventory')
 - Name
 - Table:** A table with columns: Name, Quantity, Price, and an empty cell. The table contains one row with the following data:

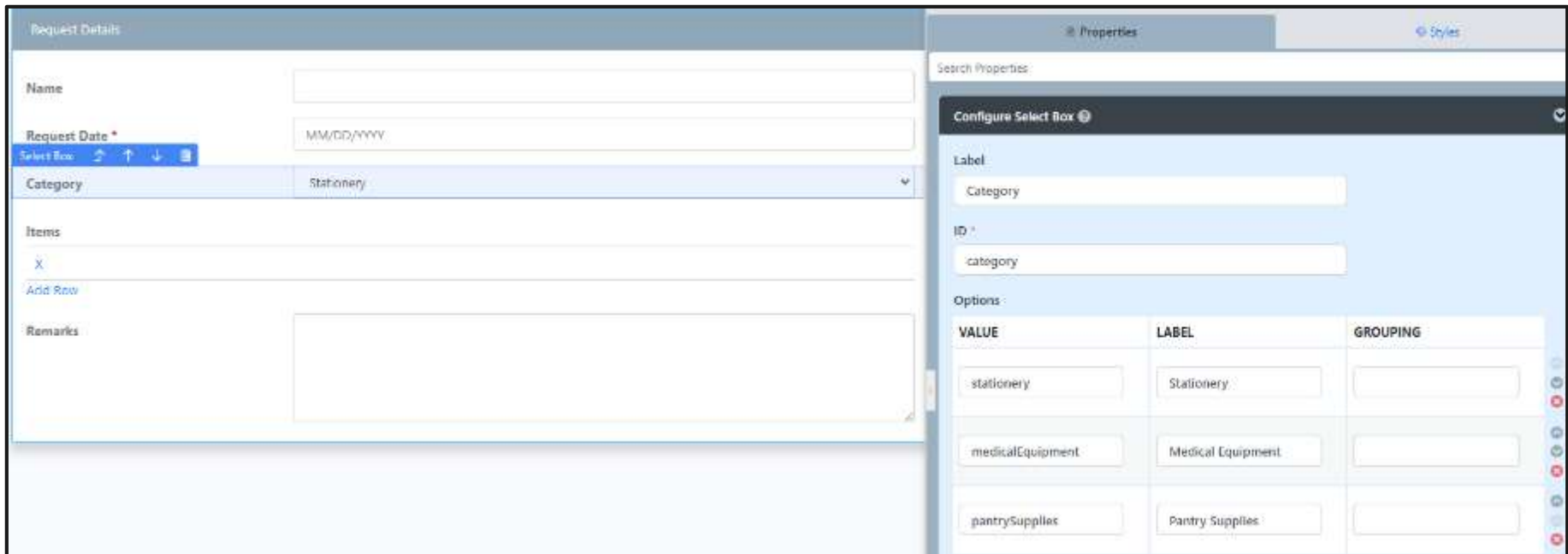
| Name | Quantity | Price | |
|--------------------------|---------------|---------------|---|
| Click to edit Add Row | Click to edit | Click to edit | X |
 - Remarks:** A large text area for additional comments.
 - Actions:** Two buttons at the bottom: 'Save As Draft' and 'Complete'.

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



The screenshot displays the Joget Builder interface. On the left, the 'Request Details' form is visible, featuring fields for Name, Request Date (with a date picker), a Category select box (currently showing 'Stationery'), an Items list (with an 'X' and an 'Add Row' button), and a Remarks text area. On the right, the 'Properties' panel is open, showing the configuration for the selected 'Category' select box. The configuration includes a Label 'Category', an ID 'category', and a table of options.

| VALUE | LABEL | GROUPING |
|------------------|-------------------|----------|
| stationery | Stationery | |
| medicalEquipment | Medical Equipment | |
| pantrySupplies | Pantry Supplies | |

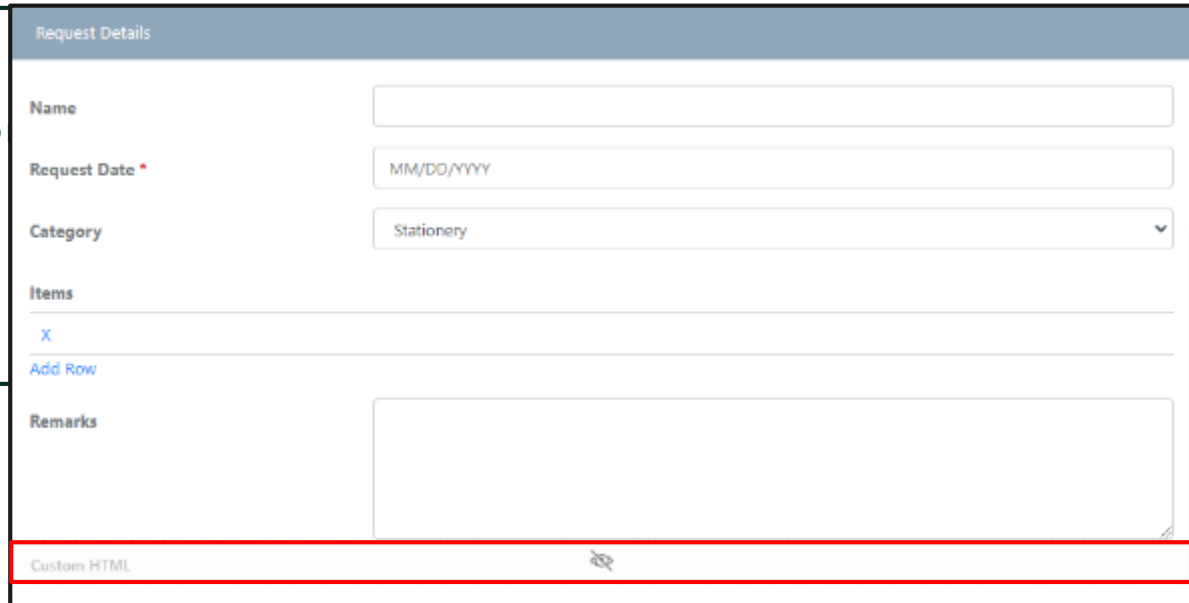
Exercise 3 – Optional

- 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>
```



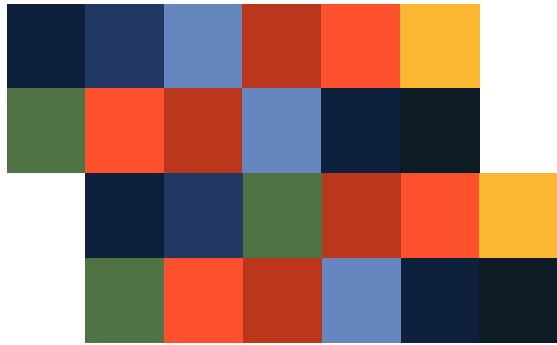
The screenshot shows a web form titled "Request Details". It contains several input fields: "Name" (text), "Request Date" (date, with a red asterisk indicating it is required), "Category" (dropdown menu showing "Stationery"), "Items" (text), and "Remarks" (text area). Below the "Items" field, there is a link "X" and a link "Add Row". At the bottom of the form, there is a "Custom HTML" property, which is highlighted with a red rectangular box. A small icon is visible next to the "Custom HTML" label.

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?

Chapter Review

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

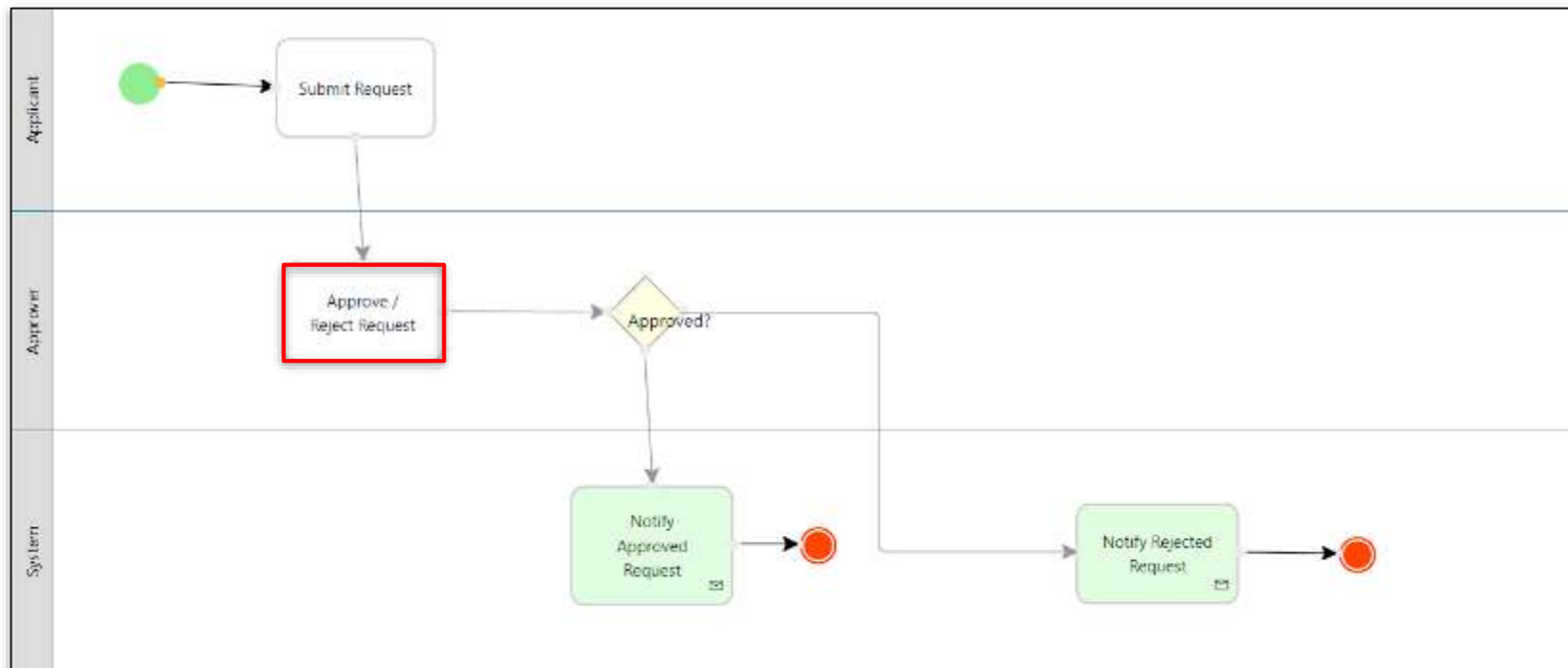


Chapter 3

Controlling Process by Using Form

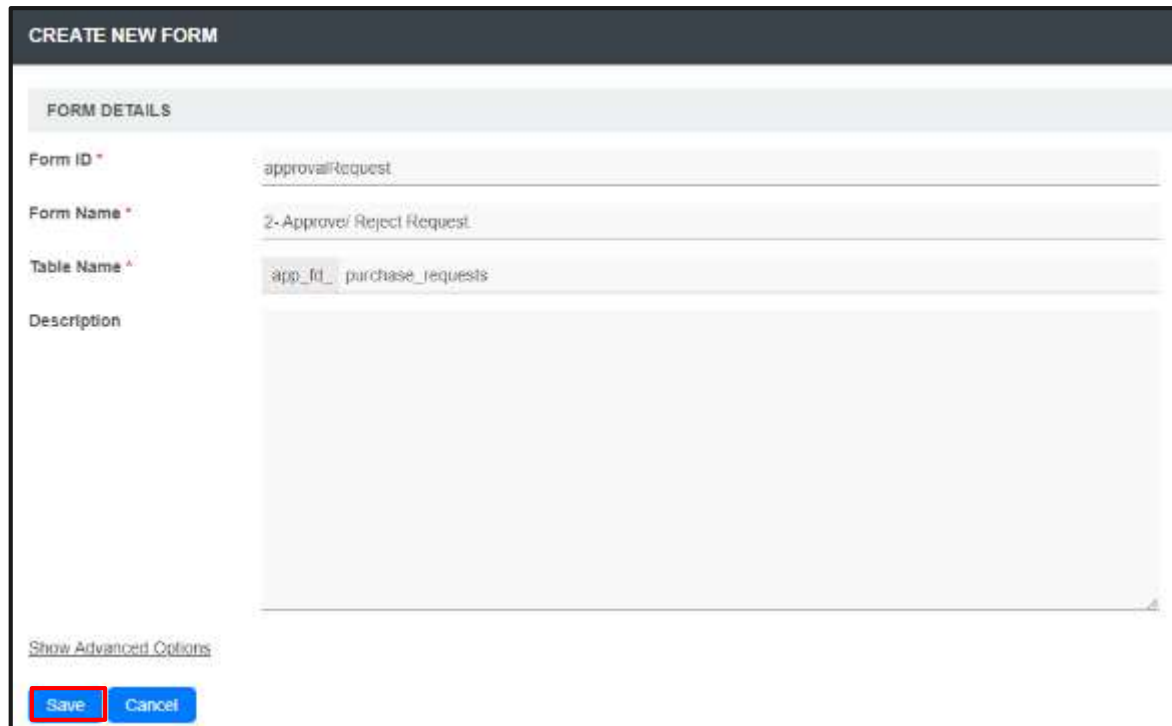
Association With the Process

- 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.



CREATE NEW FORM

FORM DETAILS

Form ID * approvalRequest

Form Name * 2-Approve/ Reject Request

Table Name * app_id_ purchase_requests

Description

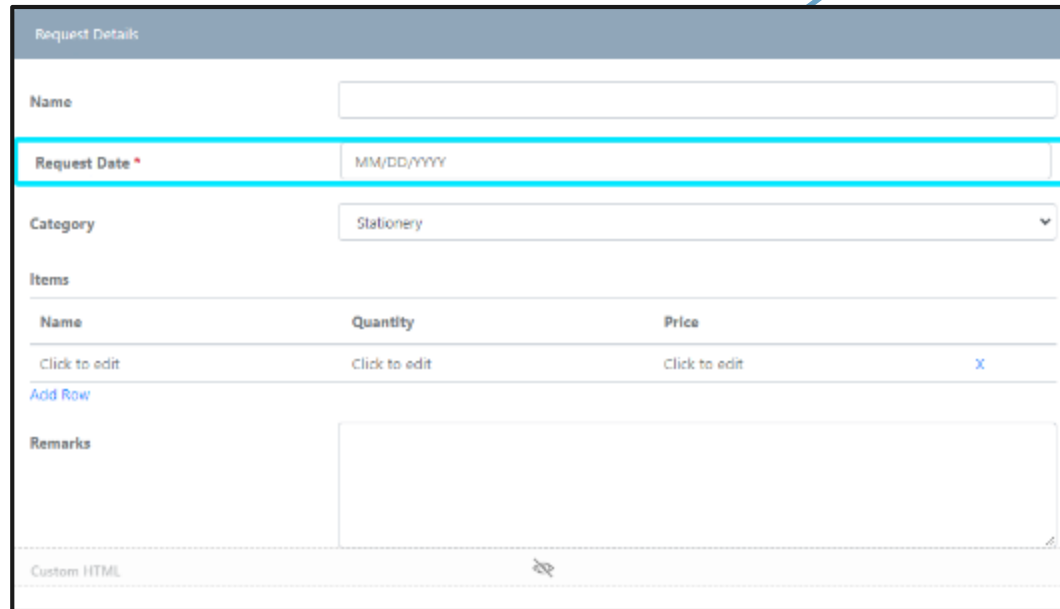
[Show Advanced Options](#)

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

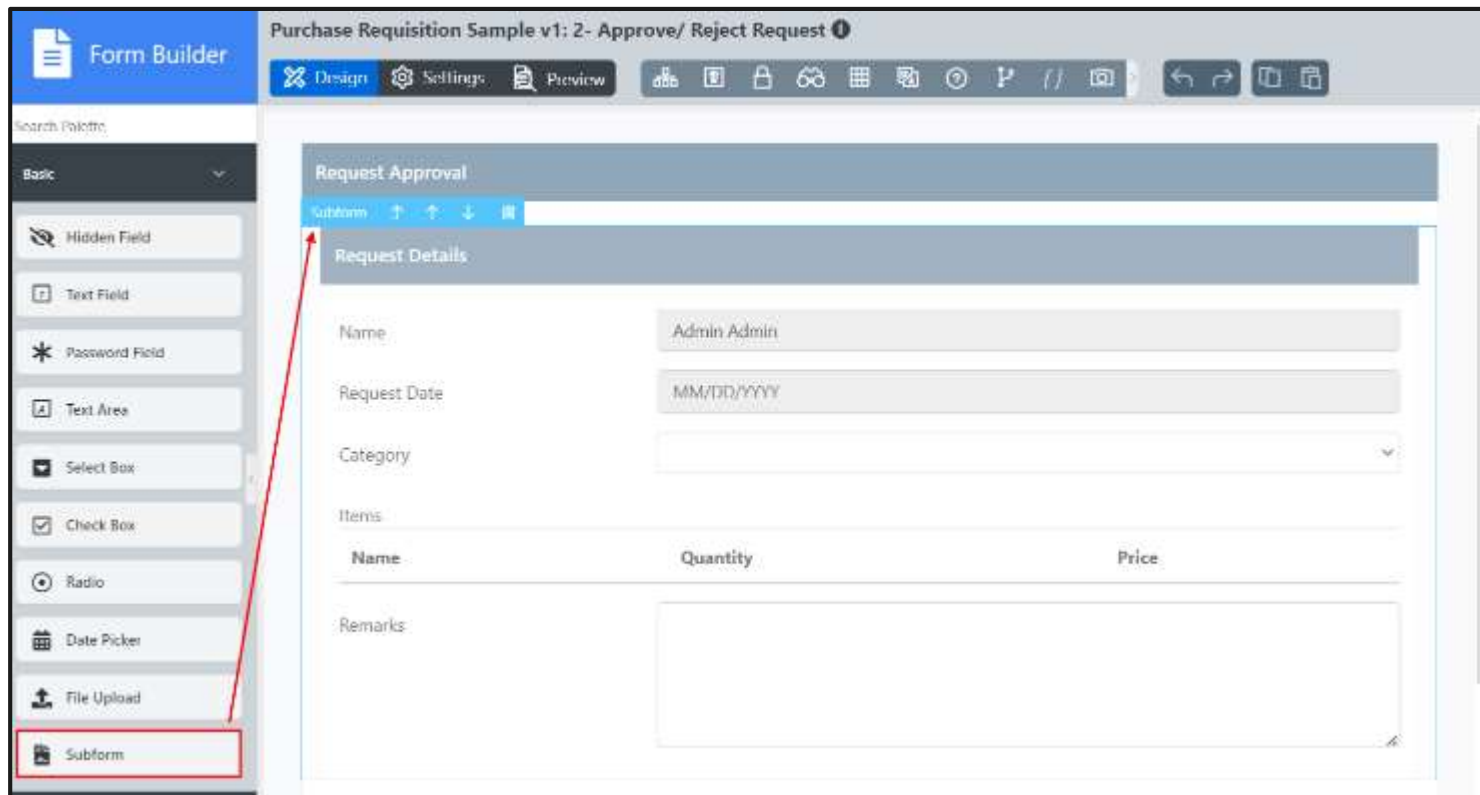


The screenshot shows a web form titled "Request Details". It contains several input fields: "Name", "Request Date" (with a date picker icon), "Category" (a dropdown menu showing "Stationery"), and "Remarks" (a text area). Below the "Category" field is a table with three columns: "Name", "Quantity", and "Price". The table has one row with "Click to edit" in each cell. Below the table is a link "Add Row". At the bottom of the form is a "Custom HTML" section. A red rectangle highlights the "Request Date" field, and a blue line points from the text box "Using '1-Submit Request' as Subform" to this field.

| Name | Quantity | Price |
|---------------|---------------|---------------|
| Click to edit | Click to edit | Click to edit |

Using Subform

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



The screenshot displays the Joget Form Builder interface for a form titled "Purchase Requisition Sample v1: 2- Approve/ Reject Request". The interface includes a left sidebar with a "Form Builder" header and a "Search Palette" section. Under the "Basic" category, various form components are listed: Hidden Field, Text Field, Password Field, Text Area, Select Box, Check Box, Radio, Date Picker, File Upload, and Subform. The "Subform" component is highlighted with a red box. A red arrow points from the "Subform" component in the sidebar to a "Subform" component within the main form area. The main form area shows a "Request Approval" section with a "Subform" component. Below this, there is a "Request Details" section with fields for Name (Admin Admin), Request Date (MM/DD/YYYY), Category (a dropdown menu), and a table for Items. The table has columns for Name, Quantity, and Price. At the bottom, there is a "Remarks" section with a text area.

Using “1-Submit Request” As Subform

Form Builder

Search Palette

Basic

Subform

Hidden Field

Text Field

Password Field

Text Area

Select Box

Check Box

Radio

Date Picker

File Upload

Purchase Requisition v3: 2- Approve/ Reject Request (Published)

Design Settings Preview

Request Approval

Request Details

Name

Request Date *

Category

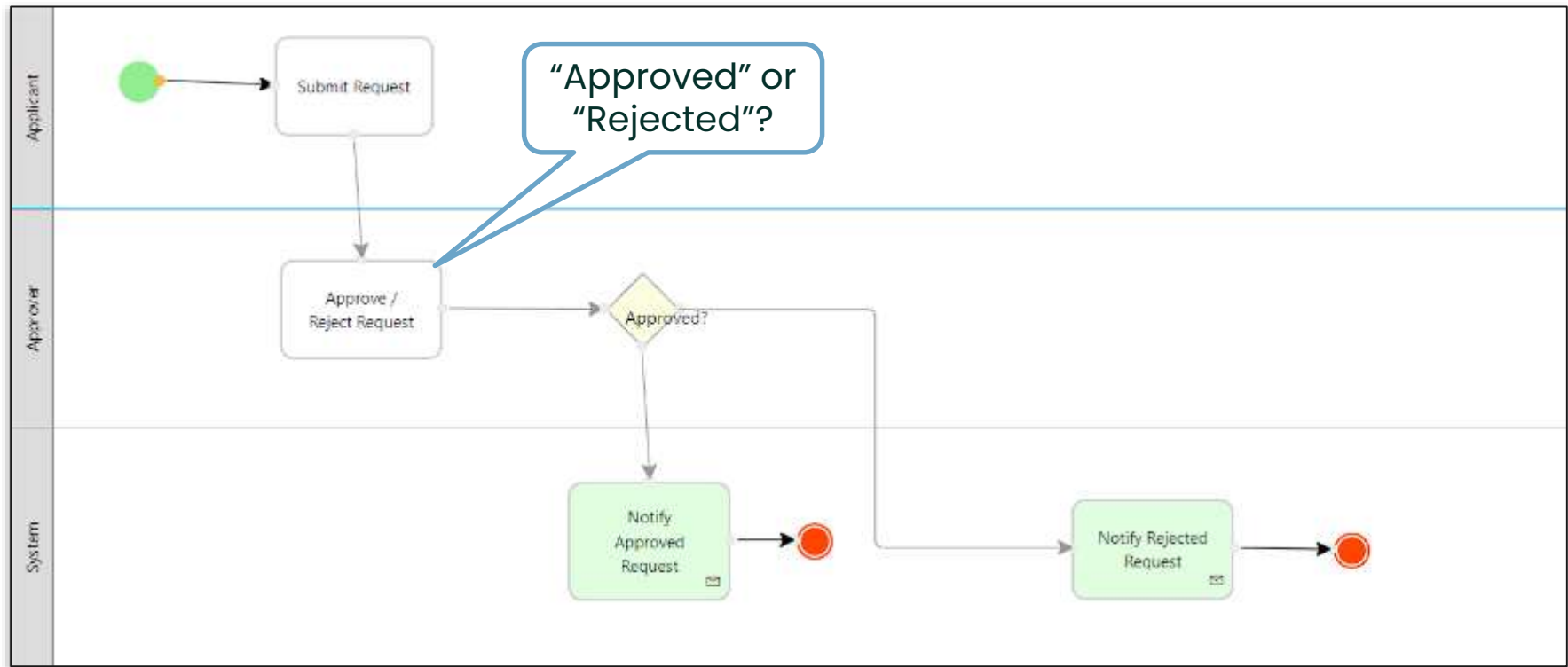
Items

Remarks

MM/DD/YYYY

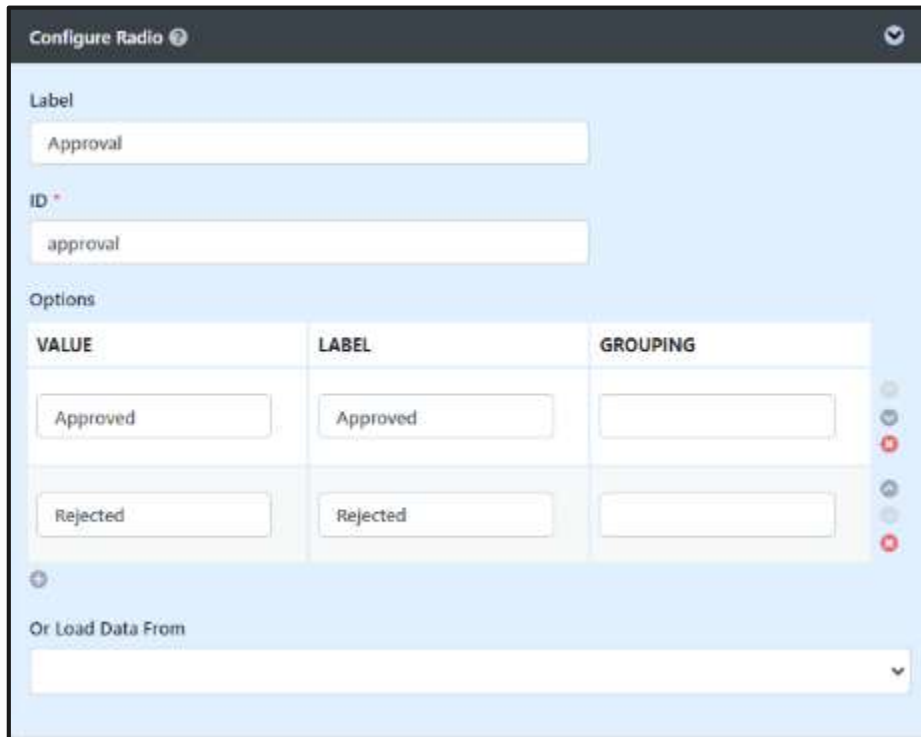
| Name | Quantity | Price |
|------|----------|-------|
|------|----------|-------|

What About the Approval Status?



Insert Radio Button

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



Configure Radio ⓘ

Label
Approval

ID *
approval

Options

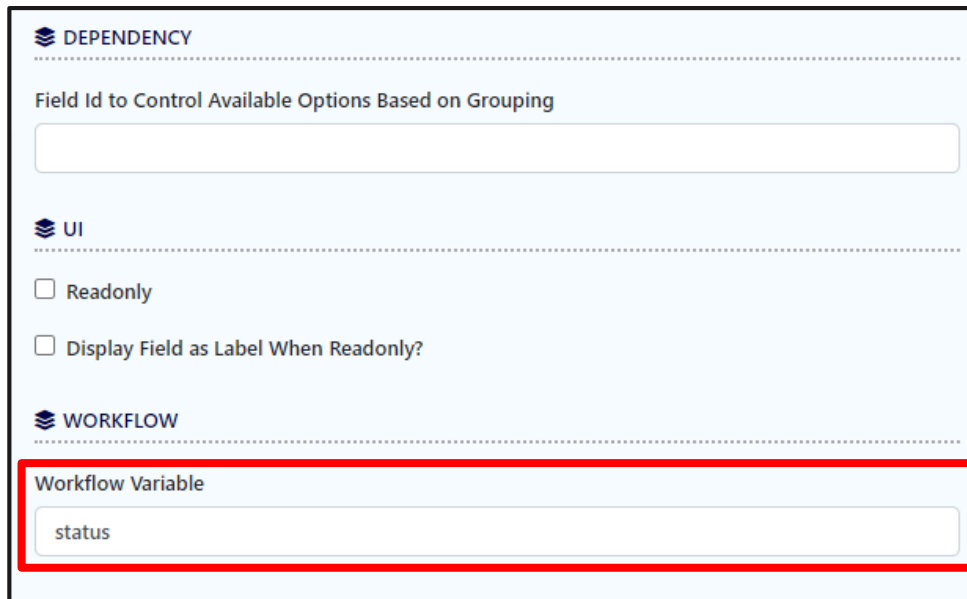
| VALUE | LABEL | GROUPING |
|----------|----------|----------|
| Approved | Approved | |
| Rejected | Rejected | |

Or Load Data From
▼

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.



The screenshot displays the 'Property Editor' interface with three sections: 'DEPENDENCY', 'UI', and 'WORKFLOW'. The 'WORKFLOW' section is expanded, showing a 'Workflow Variable' field with the value 'status' entered. A red rectangular box highlights the 'Workflow Variable' field and its value.

DEPENDENCY

Field Id to Control Available Options Based on Grouping

UI

☐ Readonly

☐ Display Field as Label When Readonly?

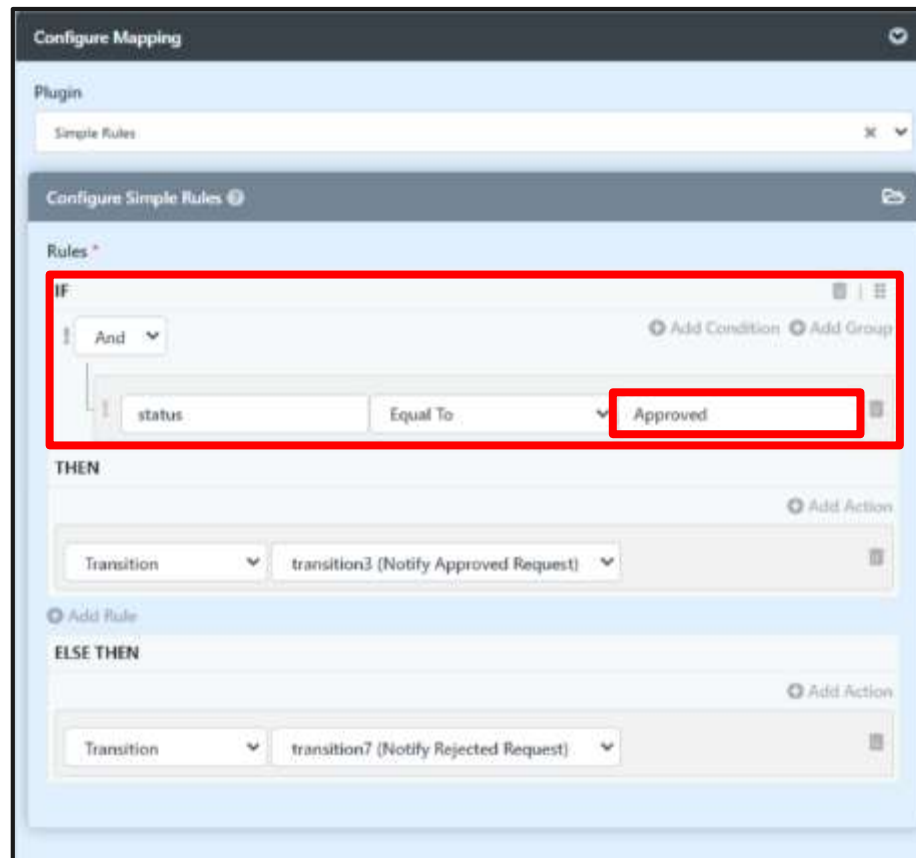
WORKFLOW

Workflow Variable

status

Process Review

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



The screenshot shows the 'Configure Mapping' dialog box in Joget. The 'Plugin' dropdown is set to 'Simple Rules'. Below it, the 'Configure Simple Rules' section is active. Under 'Rules *', there is an 'IF' condition block. The condition is set to 'And' and contains a single rule: 'status' is 'Equal To' 'Approved'. This rule is highlighted with a red rectangle. Below the 'IF' block is the 'THEN' section, which contains a 'Transition' dropdown set to 'transition3 (Notify Approved Request)'. Below the 'THEN' section is the 'ELSE THEN' section, which contains a 'Transition' dropdown set to 'transition7 (Notify Rejected Request)'.

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

status Equal To Approved

THEN

Transition transition3 (Notify Approved Request)



Request Approval Form

Form Builder

Search Palette

Basic

Subform

Hidden Field

Text Field

Password Field

Text Area

Select Box

Check Box

Radio

Date Picker

File Upload

Custom

Purchase Requisition v3: 2- Approve/ Reject Request (Published)

Design Settings Preview

Request Approval

Request Details

Name

Request Date * MM/DD/YYYY

Category

Items

| Name | Quantity | Price |
|------|----------|-------|
|------|----------|-------|

Remarks

Approval

☐ Approved

☐ Rejected

Continue With the Assignment

Welcome Purchase Requisition Portal

Wed, 5 Oct 2022

Home > Purchase Requisition > Inbox

Purchase Request Process - Approve / Reject Request

Request Approval

Request Details

Name

Request Date *

Category

Items

| Name | Quantity | Price |
|------|----------|-------|
|------|----------|-------|

Remarks

Approval

☒ Approved

☐ Rejected

Save As Draft Complete Cancel

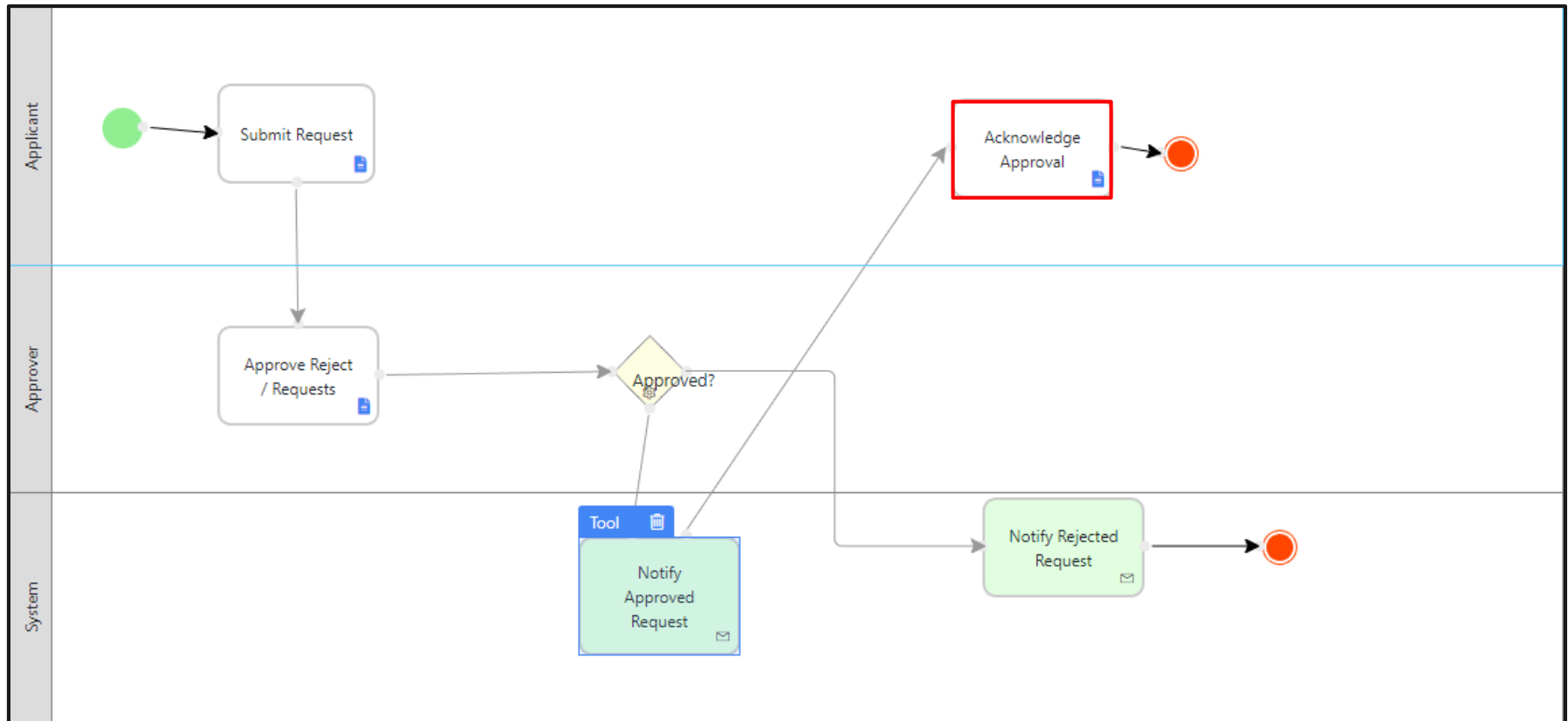
Exercise

- 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.

Acknowledge Approved Form

Form Builder

Purchase Requisition v3: 3-Acknowledge Approved (Published)

Design Settings Preview

Search Palette

Basic

- Subform
- Hidden Field
- Text Field
- Password Field
- Text Area
- Select Box
- Check Box
- Radio
- Date Picker
- File Upload

Custom

- MS Office Viewer
- Duplicate Data

Section

Approval Acknowledgement

Request Approval

Request Details

Name

Request Date * MM/DD/YYYY

Category

Items

| Name | Quantity | Price |
|---------|----------|-------|
| Remarks | | |

Approval

☐ Approved

☐ Rejected

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

Welcome Purchase Requisition Portal

Wed. 5 Oct 2022

Home > Purchase Requisition > Inbox

Purchase Request Process - Acknowledge Approval

Approval Acknowledgement

Request Approval

Request Details

Name: test 1

Request Date *: 10/10/2022

Category: Medical Equipment

Items

| Name | Quantity | Price |
|------|----------|-------|
|------|----------|-------|

Remarks

Approval

☒ Approved
☐ Rejected

Save As Draft Complete Cancel

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.

Just In Case...

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

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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