Basic User Interaction in a Flow

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1 Objective

The objective in this exercise is to build out a basic flow that will interact with the user for an example application. In the process you will be taken through the basics of building a flow and introduced to the foundational concepts of DaVinci.

Through the exercises in this training you will continue to build out the sample application getting deeper and deeper into the options and capabilities of DaVinci.

> **Tip**
>
> All the number instruction steps in each section must be followed to successfully complete this exercise. Any bullet points or images are for example only unless called out in a numbered step.

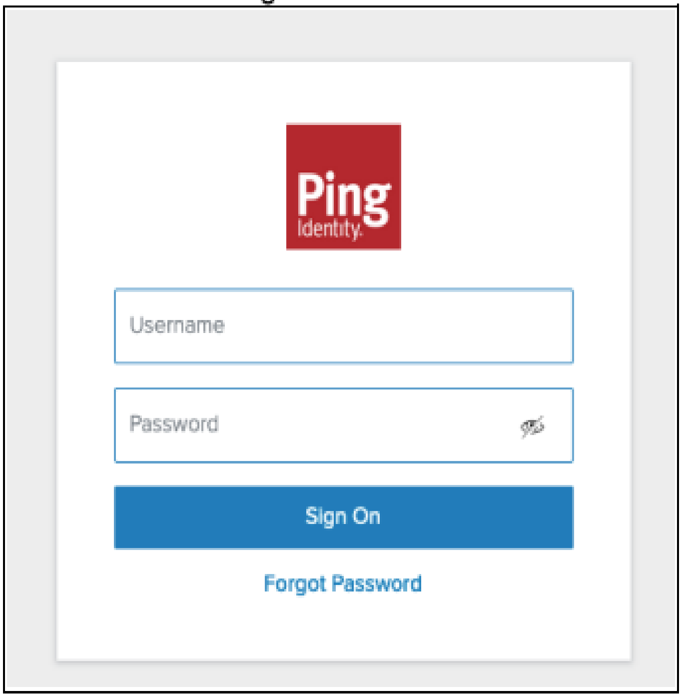
2 Do the following task items

The fist step is to map out the initial experience for a user to register an account for a fictitious gambling site. In this exercise you will get the basic flow and interaction steps defined.

2.1 Access your DaVinci administrator console

You need to access the DaVinci administrator console and you will do this through the PingOne tenant you defined in the previous exercise. Or the environment provided to you for this training.

1 If you are already logged into PingOne continue in the next section.
2 You will need the link from the invitation email that was sent when your tenant was created or the invite to this training. *You do have that email or at least the link bookmarked!*

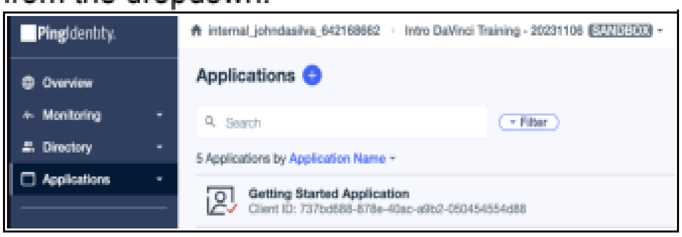


3 Enter your email in the **Username** field and password in the **Password** field.
4 Continue with the next section.

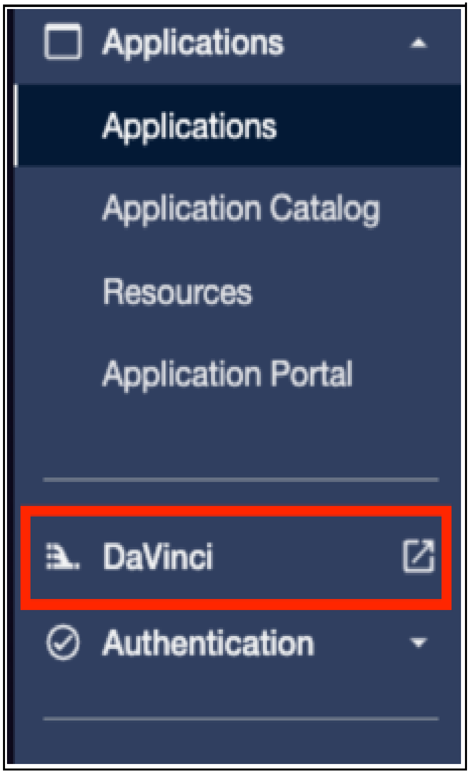
2.1.1 Launch the DaVinci Administrative console

You will do the following every time you need to launch the DaVinci console, it is provided as an external service link in the left menu of PingOne.

1 Once you are logged in from the dropdown at the top select **Intro DaVinci Training** environment from the dropdown.



2 In the **left menu** select the **DaVinci** link.



- This will launch the DaVinci console in a new tab.

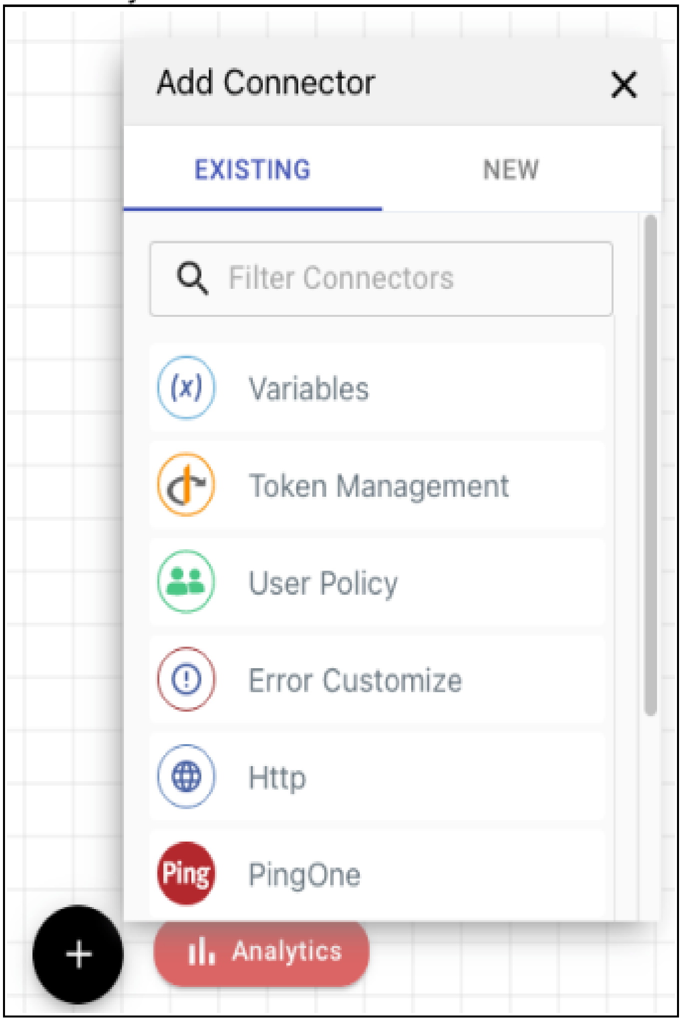
3 Continue with the next session.

2.2 Create your first flow

In this section you will create your first flow. This flow will start off with the basics of collecting the information needed to generate an account in your fictitious application.

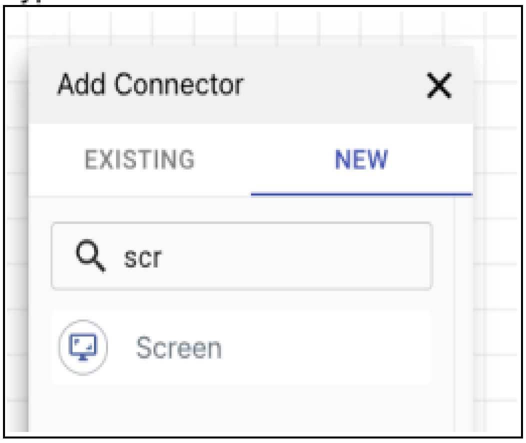
1 Select the **Flows** menu item in the left menu.
2 Click **Add Flow** button located in the upper right of the page.
3 Click on **Blank Flow** box, it has a + icon in the middle.
4 For the **Name** type
   - **Progressive Registration**
5 For the **Description** type
   - **DaVinci training class.**
6 Click **Create** button.
   - You will start off with an empty canvas to build out your flow.
7 Click the **+** icon at the bottom of the page to add a node to your canvas.

8 You will get pop up of available connectors that you can add as a node to your flow, if one does not exist you can create it.



- You can create it in the flow studio canvas or alternatively exit and go to Connectors on the left menu. It is much easier to simply do it in the flow.

9 Type **scr** into the filter box.

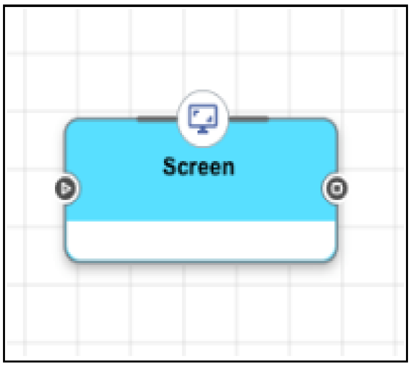


10 Click on the **Screen** entry to add the connector to your canvas.

10.1 If the connector does not exist you will need to create it

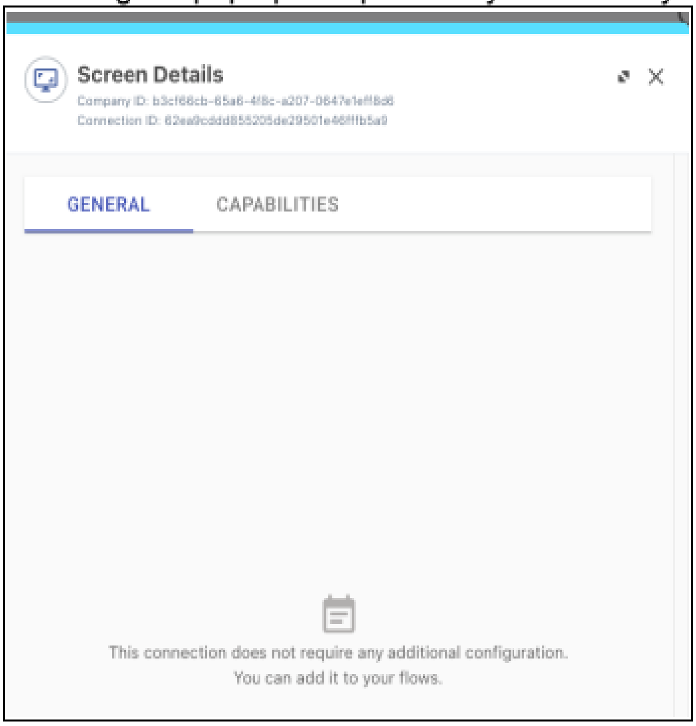
10.2 Leave the default name of **Screen** then press **Create** button.

- You will only need to do this for the first use and it does not already exist.
- Once the connector is created the node will be added to your canvas for use in this flow.



- Certain connectors require configuration, this is not one, but if it was you can accomplish that in the canvas as follows:

10.2.1 Click on the **Screen** node that you just added.
10.2.2 This opens a dialog to the right listing all the capabilities of this node.
10.2.3 Click the **gear** icon at the top next to the name of the connection type.
10.2.4 You will get a pop-up that provides you the ability to configure the connection.



10.2.5 This particular connection requires no configuration, but for those that do this is how you would access it from the flow.
10.2.6 Click **Close** button without making any changes.

11 Continue with the next section.

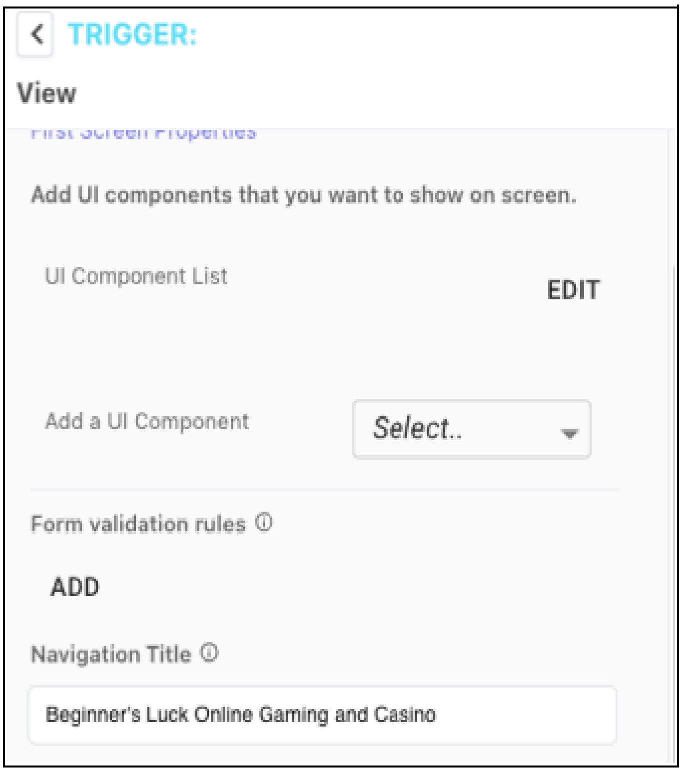
2.3 Configure the View capability

Now it is time to configure the Screen node to accept account information for the user registration. This will be the first of a series of user interaction dialogs to collect the information needed for the application.

This node will present an HTML form to the user that will be used to collect the user name information.

1 Back on the **dialog** box for the node select the **View** capability.
  - This connection only has one capability but you will encounter others as you go through this training that have many.
  - Capabilities are what you can do with a node and each capability has specific configuration options.

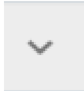
2 In the **Navigation Title** field type (or copy and paste) the following text.
  - **Beginner's Luck Online Gaming and Casino**

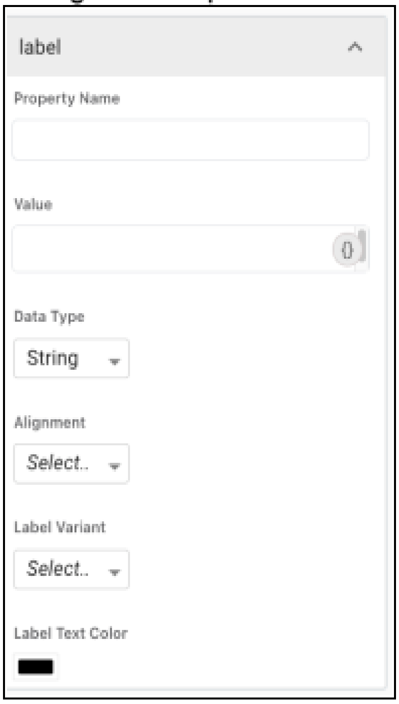


Tip

If you copy and paste any text make sure to remove extra spaces before and after the text once you have pasted it.

3 In the **Add a UI Component** dropdown select **Label** to add a field to the form.

3.1 In the **Label** component you just added, click the  to expand the UI component configuration options.



3.2 In the **Property Name** field type **pageTitle**

3.3 In the **Value** field type (or copy and paste) the following text.

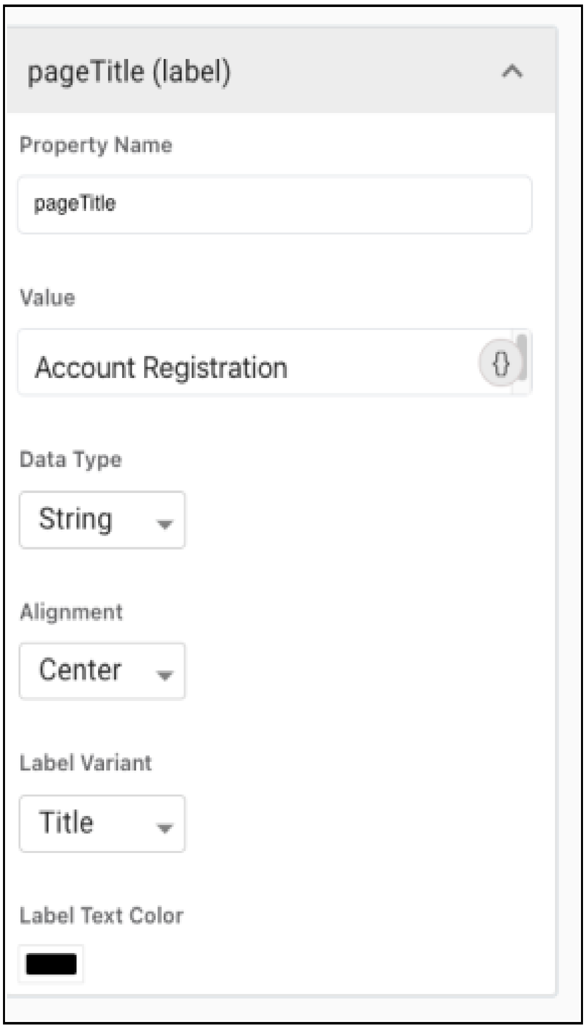
- **Account Registration**

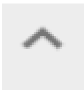
3.4 The **Data Type** field is **String**

3.5 Change **Alignment** field to **Center**

3.6 The **Label Variant** field is **Title**

3.7 Leave the default **Label Text Color**



3.8 Next to **Label**, click the  to collapse the UI component configuration options.

Tip

A quick note of caution is to apply your changes often. If you click back onto the canvas without hitting apply, your changes will not be saved.

Along with saving the changes to the node configuration it will also save the flow at its current state.

Look for a *Successfully saved flow* message on the bottom left of the DaVinci flow editor, to confirm that your applied changes were saved.

4 Click **Apply** button to save your changes in the node configuration to this point.

5 Continue with the next section.

2.3.1 Name and color your nodes

While not necessary for the flow to work it's a good practice to name and describe your nodes, especially once you start adding a lot of them. To do that, click on the node, then settings. We'll name it first and last name. This text isn't displayed to the end user.

Another handy convention is to color your nodes, for example for us let's color the nodes with user input to green. Of course you can chose any color or leave it the default, this is something your team should consider in as a standardized practice for your organization.

1 Select the **Settings** tab.
   - You will be effectively documenting your flow in the following steps to better understand what particular nodes are doing.

2 In the **Node Title** field type (or copy and paste) the following text.
   - **First & Last Name**

3 In the **Node Description** field type (or copy and paste) the following text.
   - **Capture account user name.**

4 Click the color under **Node Background Color** to select a node color then select the **light green** in the first row.

   - We will use green for nodes that are collecting input from the user and will leave the default for nodes that don't collect data.

> **Tip**
>
> A quick note of caution is to apply your changes often. If you click back onto the canvas without hitting apply, your changes will not be saved.
>
> Along with saving the changes to the node configuration it will also save the flow at its current state.

5 Click **Apply** button to apply your changes, you should see the changes to the node in the canvas.

6 Continue with the next section.

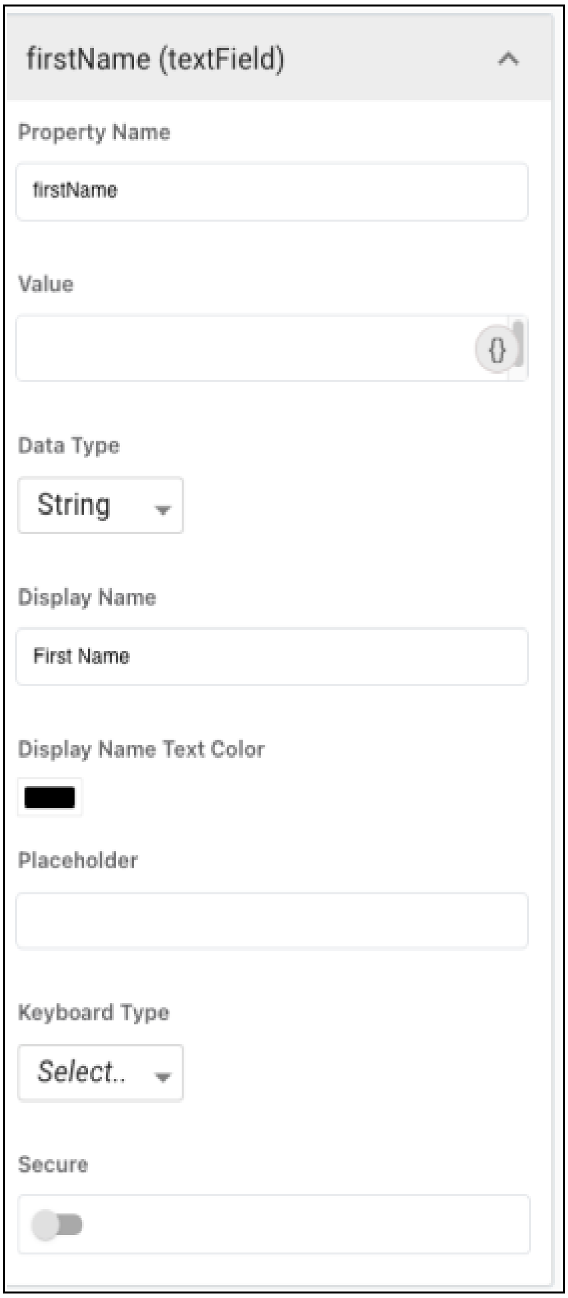
2.3.2 Add the form fields

Now it is time to define the fields that you will use to collect information from the user on this form.

> **Tip**
>
> Another note of caution is to click the **Save** button at the top of your canvas to periodically save your changes as you go through the process of creating your flow. If the button is enabled (black) then there will be changes to save, if it is disabled (grey) then everything is saved.

1 Select the **General** tab.
2 In the **Add a UI Component** dropdown select **Text Field** to add a field to the form.
  2.1 **Expand** the field you just added to configure it.
  2.2 For **Property Name** type **firstName**
  2.3 For **Display Name** type **First Name**

2.4 Accept the defaults for the remaining configuration.
- This is not a sensitive field so you do not need Secure to be toggled.
- The user will be entering a value therefore you want it to be empty to start.



2.5 **Collapse** the field configuration.

3 In the **Add a UI Component** dropdown select **Text Field** to add a field to the form.

3.1 **Expand** the field you just added to configure it.

3.2 For **Property Name** type **lastName**

3.3 For **Display Name** type **Last Name**

3.4 Accept the defaults for the remaining configuration.
- This is not a sensitive field so you do not need Secure to be toggled.
- The user will be entering a value therefore you want it to be empty to start.

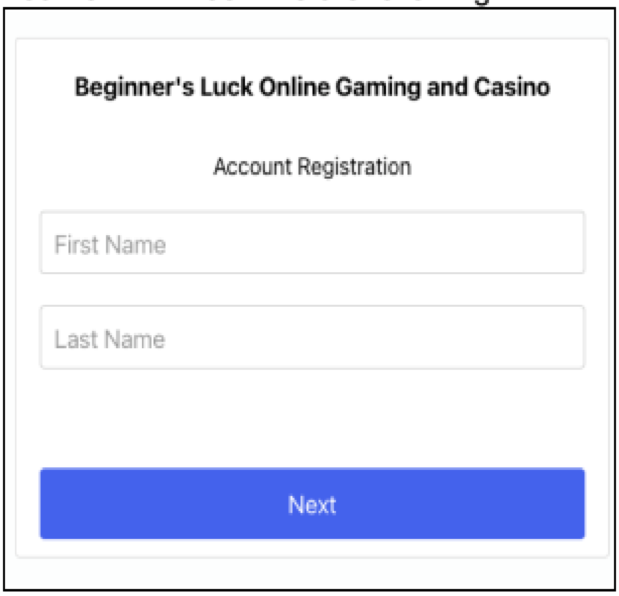
3.5 **Collapse** the field configuration.

4. Click **Apply** button to apply your changes.
5. Click **Close** to close the dialog.
6. Continue with the next section.

2.3.3 Lets test the flow

You are not done yet, but lets see if what is done so far in the flow is working. Testing incrementally as you go is a good practice.

1. If enabled click the **Save** button at the top.
2. Click **Deploy** button at the top.
3. Click the **Try Flow** button to try your workflow.
   - This will launch a new tab in your browser
4. Your form will look like the following:



5. Notice that there is a Next button on the form, the text for this can be edited in the *Next Button Text* property on the node properties.
6. You can close the browser tab showing your form.
7. Continue with the next section.

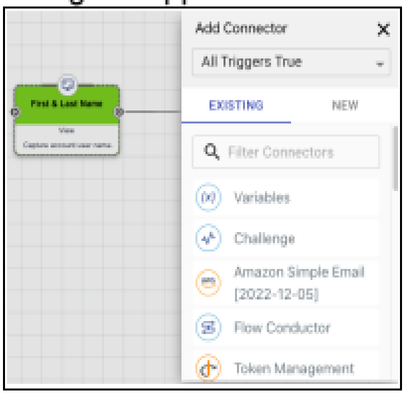
2.4 Add a new HTTP node to display entered information

The next step in your flow is to display back to the user what they have entered so far. This will act as a confirmation of the information they entered and also allow you to check the workings of the flow as you build it out.

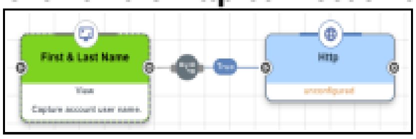
1 On your flow canvas notice the little circle/box icon on the left and right of the node.

  - This is used to draw connections between nodes in your flow to connect them together and indicate the flow direction.

2 Click right connection icon of your **First & Last Name** node holding the left mouse button and drag it to the right, then release the mouse button.
  - This will start to draw a line on the canvas when you release the mouse button a pop-up dialog will appear to add a new node to your flow.



3 Type **ht** in the filter field to find the connector/node you want to use.
4 Click on the **Http** connection to add it to the flow.



  - In addition to the Http node that was created you also have an Action Decision  node, which is the one in the middle with a flow in it.
  - This node will exist between all nodes that you place on the canvas and test the result of the previous node to decide what the next path is in the flow.
  - This decision path will of course be leveraged in this training to define potential multiple paths in a flow.
  - The default path of True (*All Triggers True*) is what you want for this path, in general you want to have your path conditions to be as specific as possible. This will be covered in more detail later.

5 If you right click on **True** you will see the options for the path.

6 Click **anywhere** on the canvas to close the pop-up without changing it.
7 Continue with the next section.

2.4.1 Configure the new Http node

In this section you will configure this node to display the information collected from the user of the application as they register for an account.

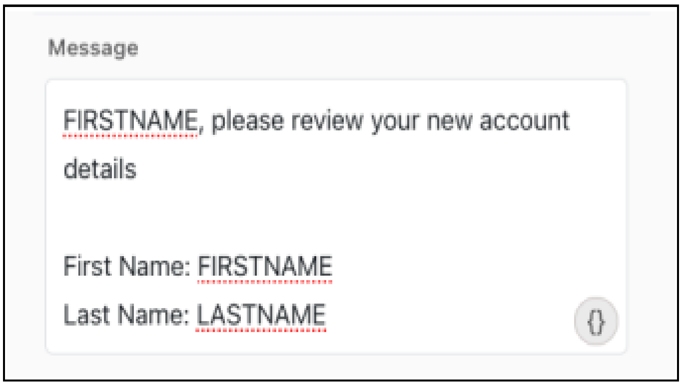
1 Click on the new **Http** node.
2 Click on the **Custom Html Message** capability, this will open the dialog in the General tab.
3 For **Message Title** field type
   - **Verify New Account Details**

4 For **Message** field, paste the following (not the *Message Title CSS* that comes before it).

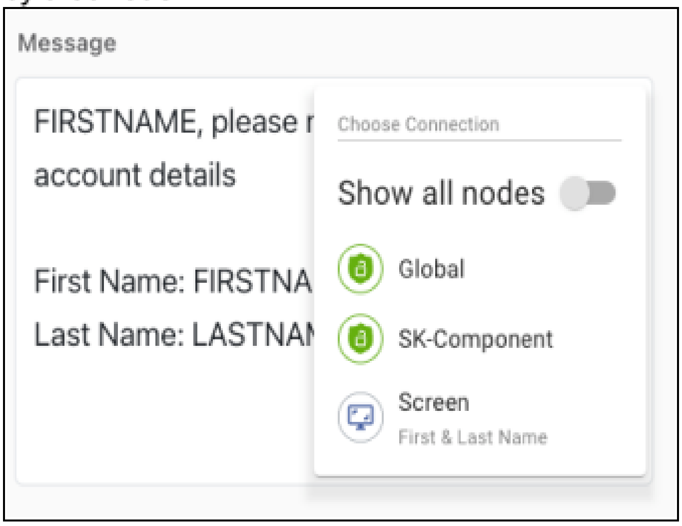
```
FIRSTNAME, please review your new account details

First Name: FIRSTNAME
Last Name: LASTNAME
```

   - The all capitals entries will be replaced with values from the previous node in the flow.

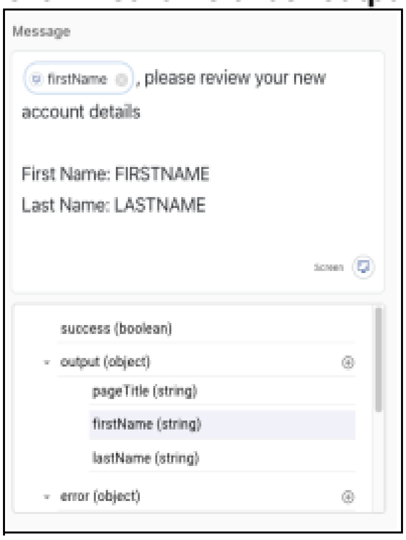
4.1 You will need to reformat it so it looks spaced properly, as shown below.



5 Select the first **FIRSTNAME** word in the message, so that it is highlighted.
6 Click the **{}** icon at the bottom of the message field. This will provide a list of nodes that come previously in the flow and some global variables.
7 Click the Screen **First & Last Name** node. This will provide a list of variables that are provided by that node.

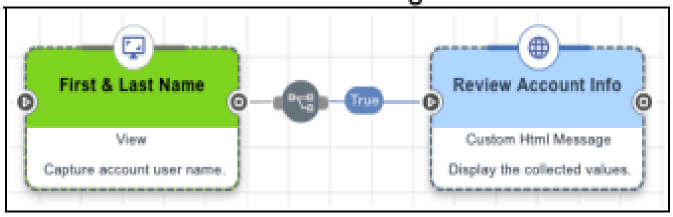


8 Click **firstName** under **output (object)** to replace the selected text with the variable reference.



9 **Repeat** the above steps for the other FIRSTNAME and LASTNAME values in the text. Of course for LASTNAME replace it with **lastName** as the variable.

10 Click **Apply** button to apply your changes.
11 Select the **Settings** tab.
12 In the **Node Title** field type (or copy and paste) the following text.
   - **Review Account Info**
13 In the **Node Description** field type (or copy and paste) the following text.
   - **Display the collected values.**
14 Leave the color as the default.
15 Click **Apply** button to apply your changes.
16 Click **Close** to close the dialog.



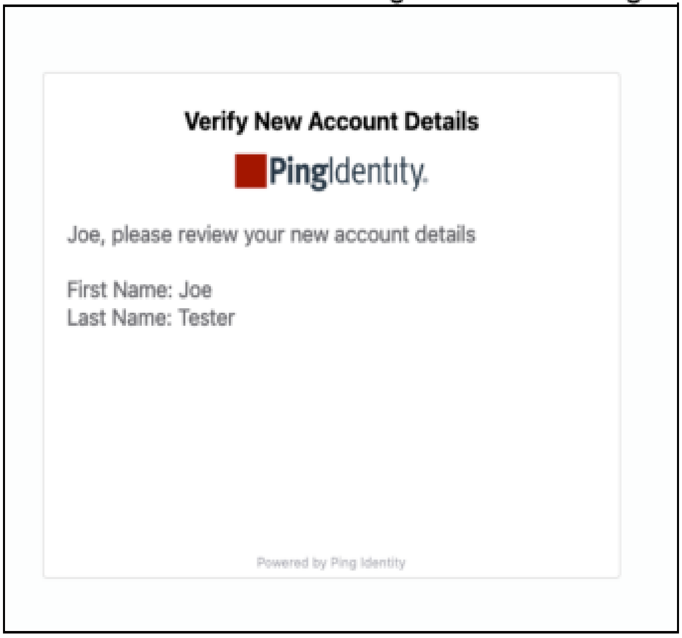
17 Continue with the next section.

2.4.2 Lets test the flow

You are not done yet, but lets see if what is done so far will work.

1 Click **Save** button at the top if not is grayed out.
2 Click **Deploy** button at the top.
3 Click the **Try Flow** button to try your workflow.
   - This will launch a new tab in your browser
4 Enter a first and last name then click **Next** button to proceed to the next node in the flow.

5 Your form will look something like the following:



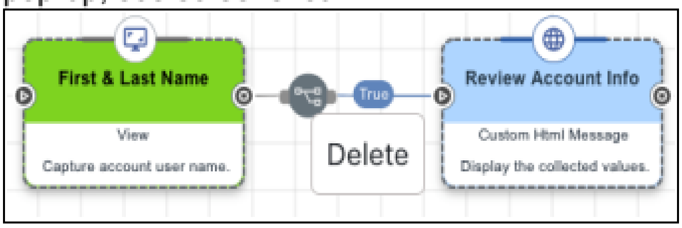
6 You can close the browser tab showing your form.
7 Continue with the next section.

2.5 Collect the user age

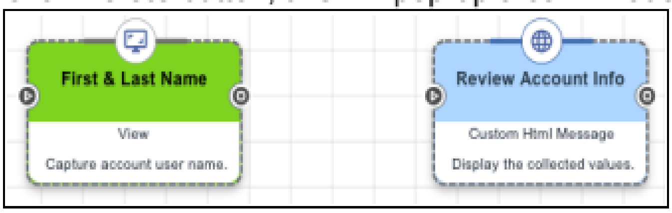
The next piece of information you need for the registration flow is the user age.

The collection of the age will of course happen before the review of account data node that was just entered.

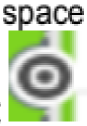
1 Right-mouse-click on the **Action Decision** node between your two nodes, a Delete button will pop-up, see screenshot:



2 Click **Delete** button, this will pop-up a confirmation dialog, click the **Delete** button on this dialog.



3 Hold the left-mouse button over the **Review Account Info** node and drag it to the right to give you more space between the nodes.

4 Click right  connection icon of your **First & Last Name** node holding the left mouse button and drag it to the right, then release the mouse button.

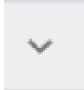
5 Click on the **Screen** connection to add it to the flow.
   - You can use the filter field and enter the first vew characters of a connector name to find it

and then select it.

6 Click on the **Screen** node to edit then select the **View** capability.

7 In the **Navigation Title** field type (or copy and paste) the following text.
  - **Verify Age**

8 In the **Add a UI Component** dropdown select **Label** to add a field to the form.

8.1 In the **Label** component you just added, click the  to expand the UI component configuration options.

8.2 In the **Property Name** field type **pageTitle**

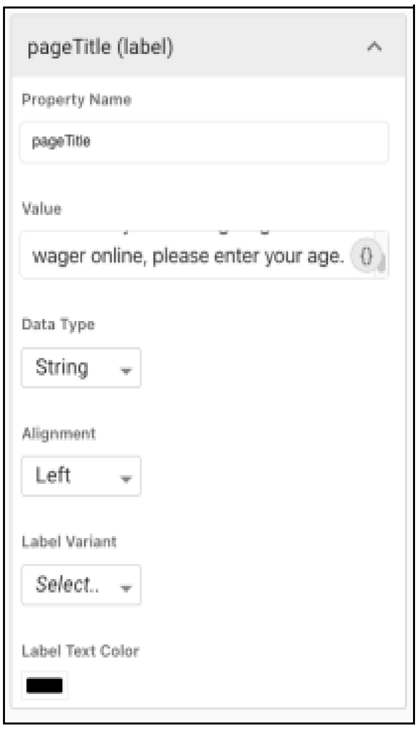
8.3 In the **Value** field type (or copy and paste) the following text.
  - **To ensure you're of legal age to wager online, please enter your age.**

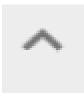
8.4 The **Data Type** field is **String**

8.5 Change **Alignment** field to **Center**

8.6 The **Label Variant** field is **Title**

8.7 Leave the default **Label Text Color**



8.8 Next to **Label**, click the  to collapse the UI component configuration options.

8.9 In the **Add a UI Component** dropdown select **Text Field** to add a field to the form.

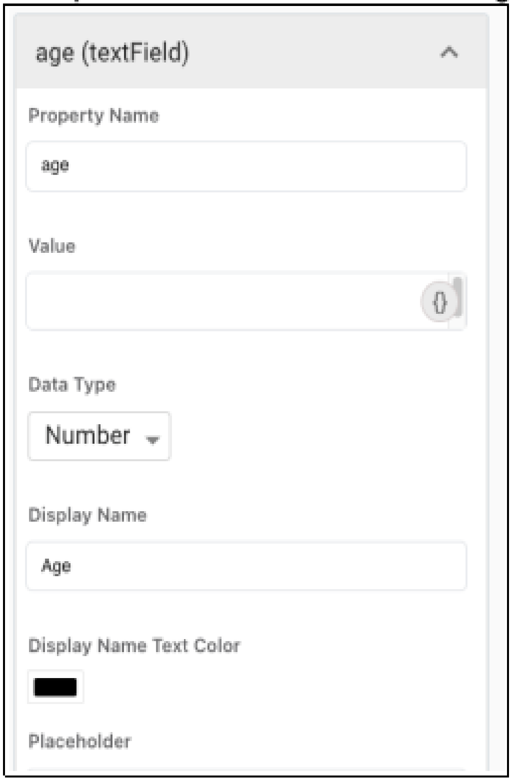
8.9.1 **Expand** the field you just added to configure it.

8.9.2 For **Property Name** type **age**

8.9.3 For **Display Name** type **Age**

8.9.4 For **Data Type** select **Number** from the dropdown list.

8.9.5 Accept the defaults for the remaining configuration.



8.9.6 **Collapse** the field configuration.

8.10 Select the **Settings** tab.

8.11 In the **Node Title** field type (or copy and paste) the following text.

- **Collect Age**

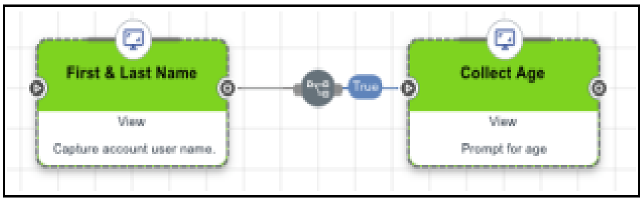
8.12 In the **Node Description** field type (or copy and paste) the following text.

- **Prompt for age**

8.13 Click the color under **Node Background Color** to select a node color then select the **light green** in the first row.

- We will use green for nodes that are collecting input from the user and will leave the default for nodes that don't collect data.

8.14 Click **Apply** button to apply your changes, you should see the changes to the node in the canvas.



8.15 Click **Close** to close the dialog.

9 **Link** the Collect Age node to the Review Account Info node in the canvas.

10 Click **Review Account** Info node and add a line to show the Age after Last Name:

11 You will add the check age functionality to your flow in the next exercise.

12 Apply and close the dialog.

13 Continue with the next section.

2.5.1 Final test of the flow

You are not done yet, but lets see if what is done so far will work. This will be the final test for this exercise.

1 Click **Save** button at the top, if needed.

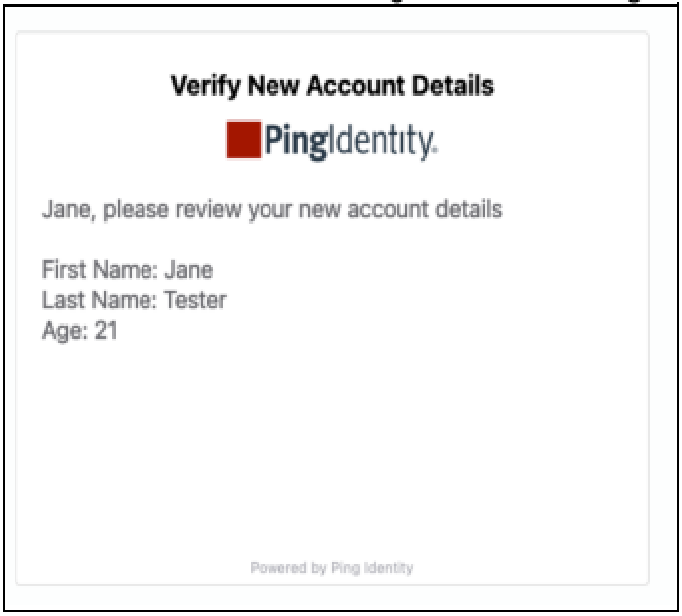
2 Click **Deploy** button at the top.

3 Click the **Try Flow** button to try your workflow.

4 Enter a first and last name then click **Next** button to proceed to the next node in the flow.

5 Enter an age then click **Next** button to proceed to the next node in the flow.

6 Your form will look something like the following:



7 You can close the browser tab showing your form.

8 You have completed this exercise.

