

Business Process Automation with ProcessMaker 3.1

A Beginner's Guide

Dipo Majekodunmi

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About the Author

Dipo Majekodunmi is a Certified ProcessMaker Architect and Developer with 7 years of experience building and automating business processes using ProcessMaker. He has implemented ProcessMaker for a number of banks and financial service providers in Nigeria, integrating ProcessMaker with banking applications and other enterprise systems. His background as a business analyst gives him the unique ability to understand and address business needs through technology. Dipo is an AIIM Certified Information Professional and holds a Post Graduate Diploma in Advanced IT and Business Management from the University of Wales. He is the founder and managing partner at dipoleDIAMOND in Lagos, Nigeria, where he helps businesses leverage technology to solve problems.

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I would like to thank Amos B. Batto, ProcessMaker Technical Documentation Writer & Forum Manager, for reviewing the code in the book and giving valuable feedback and insights to make this book better.

I have added some of his feedback about JavaScript in Chapter [9](#) verbatim in a section there labeled “Notes from Amos.”

Foreword

The rate of technological change in the workplace is increasing every day at a faster pace. Business leaders that hope to maintain a competitive edge for their businesses have no choice but to embrace this technological change. According to one study, two-thirds of the CEOs of Global 2000 companies will have digital transformation at the center of their corporate strategy by the end of 2017 (source: IDC).

Current and future CEOs will not have the luxury of letting their CIOs make key technology decisions alone. The role of the CIO and will grow in importance, but the CEO will be expected to take a more active role in technology decision-making. In more and more industries business strategy will become inextricably linked to technology strategy.

I interpret the concept of digital transformation as the merger of business strategy with technology strategy. In particular I see three important factors that contribute to digital transformation:

1. Technology
2. Data
3. Process

Some businesses will need to focus on just one of these factors to achieve true digital transformation. Others will need to focus on two or all three of these factors.

The digital transformation caused by technological change is often obvious. These technological changes are things like autonomous vehicles, RFID/IoT, and CRISPR for gene editing. These technologies are literally shaking industries to the ground. It is easy to see the transformative nature offered by these pure technology breakthroughs.

The transformation being caused by data is a little subtler. Businesses that can produce big data sets have the opportunity to create new business models based around the monetization of their big data. Google has already developed several billion-dollar businesses based off of all the search data they collect. Amazon and its clients are another big winner thanks to big data. Amazon's Mechanical Turk gathers big data sets by paying people to perform discrete tasks called HITs (Human Intelligence Tasks). The

FOREWORD

results of these HITs make platforms smarter and more valuable at things like image recognition that require lots of data to be smart enough to be valuable.

The third leg of digital transformation is process. Every type of software today manages some type of process. CRM and ERP systems have been slowly transforming most businesses for the past several decades. However, processes are changing at a faster rate today than they did just a few years ago. The effects of technology changes and changes caused by big data are rippling across all industries. The result is that more and more businesses need to automate processes even faster than before.

And once automated, the work is not done. There is no such thing as automate and forget. Critical business processes not only require faster automation; they also require faster reconfiguration.

ProcessMaker is a modern, intelligent Business Process Management and Workflow suite designed to connect systems and people to make processes run faster and smarter. With the ProcessMaker visual process designer, it is simple to build process apps that connect system APIs, web forms, data, and people into a single process.

Examples of some of the custom processes that our customers model and automate in ProcessMaker include the following:

- Credit Applications
- Change Order Requests
- Purchase Requests
- CAPEX Requests
- AFE Requests
- Employee On-boarding Processes
- System Access Requests
- New Product Development

We are very excited to be able to recommend to our users Dipo's *Business Process Automation with ProcessMaker 3.1: A Beginner's Guide*. I have personally had the chance to work with Dipo over several years, and I have always been extremely impressed by both his technical knowledge and his business acumen. I believe that to be able to write a truly useful guide to ProcessMaker and BPM, a writer must have knowledge in both

areas. Dipo has just that. Dipo's years of working in banking and other industries have given him deep first-hand experience implementing real processes for real businesses. I am sure that ProcessMaker users all around the world will benefit enormously from this guide.

So enjoy the guide, and happy process automation!

Brian S. Reale, Co-Founder ProcessMaker

Introduction

I first came across ProcessMaker in 2010 when researching for an alternative BPM application at work to replace the current one we used. Even though I had no previous experience working with the solution, I was able to build a process in a matter of hours. Within a week I had a demo ready to show my boss.

Over the past seven years, I have worked on automating more complex business processes, integrating ProcessMaker with enterprise applications and building custom plugins. When I'm passionately proselytizing ProcessMaker, my new converts are not always sure where to start. This book is my effort to help those new to ProcessMaker understand the concepts and get started automating business processes.

I have learned a lot writing this book and would appreciate your feedback about it. You can leave your feedback, comments, questions and suggestions on the Learning BPM blog: <https://learningbpm.com/books/beginners-guide-feedback>

While on the subject of the blog, I will also post new insights, tips, and tricks on the blog, and you can also suggest topics you would like to see covered.

Once again, thank you for purchasing this book and all the best in automating your business processes.

—Dipo Majekodunmi