Bonita Open Solution
Version 5.0
(Preview)
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Welcome to Bonita Open Solution!

Download Bonita Open Solution 5.0: www.bonitasoft.com/products/downloads.php

Use this QuickStart Guide to get started with Bonita Open Solution and become familiar with designing a process with its graphic tools.

Download, install, and launch Bonita Open Solution 5.0

Download Bonita All-in-One. When the zipped folder has been downloaded, extract all files. To launch Bonita Open Solution and begin designing a process:

- open the unzipped bonita-all-in-one folder,
- open the Studio folder, and
- launch the BonitaStudio application file for your operating system.

QuickStart Overview and Tutorial

The Overview may help you to begin working with Bonita Open Solution quickly, particularly if you are already familiar with Bonita. After the Overview is a Tutorial that will take you through creating, running, and managing a Process step by step.

QuickStart Overview

![Bonita Studio](Bonita Studio.png)

Select New to create a new process

Open an existing .proc file

Import .bar files (created in BOS v5)

Open some examples

You can also go directly to User Experience (on the Tool Bar) where existing Processes and Cases are managed.
Bonita Open Solution 5.0 QuickStart

Bonita Studio

When you click New to enter Bonita Studio, the Whiteboard is ready to begin:

1. Draw your Process directly on the Whiteboard

2. Begin with a Start and the first Step
   - Click the Step to use the Context Palette
   - Or click the Palette to activate the Tools – click the element, click the Whiteboard

3. Define Details for the Process, for a Step, for a Gate, or for a Transition:
   - Name
   - Step Type (Human, Automatic, Subprocess)
   - Step Actors (Group, Individual)
   - Process (global) and Step (local) Data variables
   - Connectors (to external databases, messaging)
   - Transition Conditions (if-then)

4. Click Run to deploy completed Process

5. Click User Experience to start and manage Process

Lanes can define parallel (independent or linked) Processes

A Pool can contain one or more Lanes

See the Overview of the whole Process in ZoomOut

Figure 2. Bonita Studio ready to design a new Process
Bonita Open Solution 5.0 QuickStart

Bonita User Experience:

*Figure 3. Bonita User Experience provides an in-box to manage Processes and Cases*

- **Processes and cases** can be managed in an email-like interface with:
  - Stars
  - Labels
  - Read and unread options

**Start Case** starts New cases of each Process
QuickStart Tutorial

Follow the QuickStart tutorial example to:

- Design a complete Process graphically in Bonita Studio, as you
  - Draw Steps and Transitions using the graphic tools in the Bonita Studio Palette
  - Create an iteration and add a Gate
  - Add Conditions to Transitions
  - Add Details to the Process (global variables) and to Individual Steps (local variables)
- Run the Process you create
- Complete a Process Case and interact with the manual Steps
- See the Process, and the Cases you will create, in Bonita User Experience

Prepare to Design a Process Graphically in Bonita Studio

Design a simple process, “Web Purchase:”

1. A customer orders an item from a web store.
2. A company sales employee processes the request manually (approves it, rejects it, or adds more information to the order).
3. If/When the customer’s order is approved, he/she pays for the order.
4. The customer chooses whether to have the item shipped by Express Delivery.
5. The transaction is archived.

The Process will look like this when completed:

![Diagram of Web Purchase Process]

Figure 4. Completed Web Purchase Process

(It might be helpful to keep this handy as you design the Process.)
Launch Bonita Studio


Draw Steps and Transitions

Start by defining the Steps to create a Web Purchase process.

The first step in this Process is to review and process a customer’s order. (In this tutorial, you’ll define the customer order after defining the process to handle it.)

Click the initial Step, if necessary, to highlight it. Note that its Context Palette is highlighted too.

![Figure 5. Begin a new Process with a Start and a Step](image)

Go to the Details panel, click General if necessary to highlight it, and enter:

<table>
<thead>
<tr>
<th>General</th>
<th>Name</th>
<th>Sales Review (Sales_Review)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Sales employee receives order for processing</td>
<td></td>
</tr>
<tr>
<td>Activity type</td>
<td>Human</td>
<td></td>
</tr>
</tbody>
</table>

Figure 6. Enter General Details for Sales Review
Before adding the next Steps, define who will take action in this Step the Actor(s). (For the purpose of this tutorial, the Actor(s) defined for all Human (manual) Steps will be defined as the Process Initiator (you). This will give you full access to test all interactive parts of the process after you Run it.)

Click the **Actors** in **Details** for **Sales Review**:

![Figure 7. Create a Group of Actors for Sales Review](image)

**Select:**
- Group
- Create

Complete the dialogs:

![Figure 8. Name a Group of Actors](image)

**Enter:**
- **Name**: Sales Employees
- **Description**: Employees authorized to handle web sales

Click **Next**
Figure 9. Define a Group of Actors

(Recall that you will include the *Process Initiator* in all Steps for the purpose of this Tutorial.)

Figure 10. Finish defining a Group of Actors
The Group you just created will now show in the list of Groups available for this Step.

Figure 11. Newly created Group shows up in Groups list

You’ll come back to this Step later to add additional Details.

At this point in the process, the sales employee can choose to:

1) validate the request and the customer can pay; OR
2) reject the request; OR
3) enter more information relevant to the customer’s order.

Accordingly, next add 3 Steps, all connected to Sales Review.

Sales Review should still be highlighted. (If not, click it.) The Context Palette to the right of the Step is highlighted too.

Click on the Step tool (circled) and drag a new Step onto the Whiteboard.

Figure 12. Use Context Palette to draw new elements on the Whiteboard
Be sure that the new Step is highlighted. Go to Details and click General to name it:

Click on Actors to define:

Figure 13. Name a new Step and enter its General Details

Figure 14. Define a new Group of Actors for this Step
Figure 15. Name the new Group of Actors
Enter Name “Customer”
Description Preferred customer list
Click Next

Figure 16. Define the new Group of Actors
Select Other and Process Initiator
Click Next
Figure 17. Finish defining the new Group of Actors

The Group you created will now show in the list of Groups available for this Step.

Figure 18. Newly created Group shows up in Groups list for this Step
Bonita Open Solution 5.0 QuickStart

Now add the other 2 Steps connected to Sales Review. First, **Reject**. In Details \ General:

![Figure 19. Add Reject Step and define its General Details]

Then, **More Info**. In Details \ general and then Details \ Actors:

![Figure 20. Add More Info Step and define its General Details and Actors]

You’ll add the information that determines the necessary conditions (if-then) for each of these 3 Transition paths later.
Rename the Process from “My Process” to “Web Purchase.” Click on the Whiteboard to deselect all elements. Click on **Details \ General**:  

![Diagram of process flow](image)

**Figure 21. Rename this Process**

Enter:  
**Process Name**: Web Purchase  
**Version**: 1.0  
**Description**: Simple item purchase from Web site – tutorial example

Save the Process. The Whiteboard tab and the Pool are now labeled “Web_Purchase_1.0.” Continue the Process definition.

As the customer completes the Pay Step, he/she will choose whether the item is to be sent express. Click **Pay** and use the Context Palette to add a new Step. Name it **Express Delivery**.

![Diagram of process flow](image)

**Figure 22. Add Express Delivery Step and define its General Details**

Enter:  
**Name**: Express Delivery  
**Description**: Send item via 3-day delivery  
**Activity type**: Automatic
End this Process by archiving the interaction. Add a Step after Express Delivery, go to Details > General, and name it Archive.

![Image of BPMN diagram with labeled steps and transitions]

Figure 23. Add Archive Step and define its General Details

Now that all the Steps have been defined, add the Transitions to connect them.

As “no-express-delivery” requests will also be archived, add a Transition between Pay and Archive. Select ➔ Transition from the Palette, click Pay and drag the arrow to Archive.

As rejected requests will also be archived, add a Transition between Reject and Archive. Select ➔ Transition, then Reject and drag to Archive.

End the process – highlight Archive and add an End.

Enter:
- Name: Archive
- Description: System archives record of transaction
- Activity type: Automatic
Click and drag the individual elements in your Process to rearrange them if you wish.

The general sequence of the Process is nearly defined. Now add missing information to complete it.
Create an Iteration and Add an XOR gate

Note that **More Info** has an input but no output. The output needs to be returned to the sales employee so he/she can add information and complete the approval.

However Sales Review will then have two inputs. A **Gate** is required to define how these inputs should be treated. Sales Review can proceed with either input, so an **XOR Gate** is needed.

![Diagram of workflow](image1)

**Figure 25. Add an XOR Gate**

- Select **Gate** from **Palette** and place it on Whiteboard.
- Change Gate **Type** to **XOR**.
- Draw **Transition** between **More Info** and **Gate**. (Select from the Palette, click **More Info** and drag the arrow to **Gate**.)
- Delete Transition **Customer Request - Sales Review** by selecting it and hitting **Delete** on the keyboard.
- Draw new Transition **Customer Request - Gate**.
- Draw new Transition **Gate - Sales Review**.
Add Conditions to Transitions

Note that Sales Review has 3 outputs. To define the conditions for each path, modify the Details of Sales Review to add Data that will be used by the Condition you’ll define for each of its Transitions.

Select Sales Review and in its Details, add Data:

![Image of Details window]

Figure 26. Add Data to Details for Sales Review

![Image of New Variable window]

Figure 27. Define an enumerated list for Sales Review

Enter:
- **Name**: Decision
- **Description**: Multiple options require a decision

Select:
- **Data type**: New Enumeration
- **Name** (of enumerated list): Approval
- **Description**: Decision to approve, reject, or add more info

Add: “Approve,” “Reject,” and “More Info”

Click OK
The new enumerated list variable now shows in Sales Review \ Details \ Data.

Figure 28. Select a default value for the list

Select: Default value Approve
Click Finish

Figure 29. Newly created Data (variable) shows up in Data for this Step
Associate each Transition output from **Sales Review** with its associated decision **Condition**. Select each Transition in turn:

<table>
<thead>
<tr>
<th>General</th>
<th>Name</th>
<th>Description</th>
<th>Condition</th>
</tr>
</thead>
<tbody>
<tr>
<td>if approved</td>
<td></td>
<td></td>
<td>Decision==&quot;Approve&quot;</td>
</tr>
</tbody>
</table>

**Sales Review - Pay:**
- **Name**: if approved
- **Conditions**: Decision=="Approve"

**Sales Review – Reject:**
- **Name**: if not approved
- **Conditions**: Decision=="Reject"

**Sales Review - More Info:**
- **Name**: add a comment
- **Conditions**: Decision=="More Info"

Figure 30. Define Conditions for Transitions

The Name of each Transition now shows on the Process.

Figure 31. Transition Names appear on Whiteboard

Note that Pay has two outputs, too. You’ll return to modify its Details in a similar way. But first...
Add Details to Process/Steps

Complete the details for the global Process Web Purchase. This information will be used to generate the form that the customer completes – and will begin the process.

Add 4 global variables: 3 string on one list. Click on the Whiteboard, Select Web Purchase Details: Select Data, then Add.

![Add Data to Details for Web Purchase Process](image)

Figure 32. Add Data to Details for Web Purchase Process (global variable)

Enter:
Name Customer Name
Description Customer’s full name
Data type String
Click Finish

Continue, and Add “Customer Phone” and “Customer Email” as string variables.
For the last variable, add an enumeration (list).

![Screenshot of adding a new variable with an example list]

**Figure 33.** Define an enumerated list for Process (global list variable)

Enter:
- **Name**: Products
- **Description**: Available products

Select:
- **Data type**: New Enumeration
- **Name**: Promotional Products
- **Description**: Special prices online

Add:
- TV
- Mobile phone
- Laptop

Click OK
Select the default:

![Image of a window with a form for adding a new variable]

**Figure 34.** Select a default value for the list

Note that **Web Purchase \ Details \ Data** now contains 4 global variables.

![Image of a process editor with a list of variables]

**Figure 35.** Newly created Data (variable) shows up in Data for the Process
Now complete the details for the More Info and Pay Steps:

More Info

For Actors, choose the Group Sales Employees that you have already defined.

- Select Group and Choose
- Select Sales Employees
- Click Finish

Add Data:

Figure 36. Add Data to Details for More Info

Enter:
Name Comment
Description Additional information supplied by sales employee
Data type String
Click Finish
The new variable now shows in Details.

![Details](image)

**Figure 37. Newly created Data (variable) shows up in Data for this step**

### Pay

**Add Data**: 2 string variables and 1 Boolean variable:

Add 2 string variables:

- **Name**: Credit Card Number
- **Description**: Customer’s Credit Card
- **Data type**: String

and

- **Name**: Expiration Date
- **Description**: Card valid until
- **Data type**: Date (accept default value)

And add a Boolean yes/no for the choice of express delivery:

- **Name**: Choose Express Delivery
- **Description**: If yes - send express; if no - send regular post
- **Data type**: Boolean
- **Default Value**: true
- **Click Finish**
Here is where you’ll define the conditions for each output path.

Add “if-then” **Conditions** to 2 Transitions.

Select the **Transition** between **Pay** and **Express Delivery**.

![Figure 38. Add a Condition to a Transition](image)

Select the **Transition** between **Pay** and **Gate**. Change its name to “If no.” In the **Conditions** field, enter “ Choose_Express_Delivery==false “.

The Name of each Transition now shows on the Process.

![Figure 39. Transition Names appear on Whiteboard](image)

The Process is now complete and ready to deploy/run. **Be sure to save your Process.** “Run” will always run the last saved version.
Run a Process

To Run (deploy) your process, click the Run icon ⏯ from the Task bar or select Run from the Menu bar.

After a few moments, Bonita Open Solution will present a message. The deployment is successful. Note that you are logged in as the Admin.

The Process can now run Step by Step:

![Customer order form begins the Web Purchase Process](image)

**Figure 40. Web Purchase Process Case initial form (customer order form)**

At each Step, you can take action as you have previously defined it. (Note that you as Administrator are testing the manual actions of the Customer at the beginning of the Process and at Pay, and of the Sales Employee at Sales Review and More Info.)
The information entered by the “customer” is presented for approval in the Sales Review Step. You can now Approve, Reject, or request to enter More Information.

Figure 41. Fill in Web Purchase Process customer order form to start a Case

Figure 42. Choose a Decision at Sales Review Step
NOTE: If you are unable to fill in a field, use Tab or (Shift Tab) to navigate between fields. The blocked field should then open.

Figure 43. Fill in form presented at More Info Step

As “Sales Employee”: enter additional information

Figure 44. Fill in form presented (again, after iteration) at Sales Review Step

As “Sales Employee”: select Approve
As “Customer”: Fill in Credit Card Number and Expiration Date and select Express Delivery

Figure 45. Fill form presented at Pay Step

Process completed. Go to User Experience

Figure 46. Web Purchase Case completed

Click on Bonita User Experience (circled in red) to open.
Complete a Process Case

Use Bonita User Experience to run multiple Cases of this Process. Note that you can also open the User Experience by clicking on the User XP icon on the Task bar in Bonita Studio.

Your inbox now contains a record of all the actions you have been involved in. You can look at these actions at any time.

![Bonita User Experience with completed Web Purchase Process test Case](image1)

**Figure 47.** Bonita User Experience with completed *Web Purchase* Process test Case

![Web Purchase Process test Case expanded](image2)

**Figure 48.** *Web Purchase* Process test Case expanded

The *Web Purchase* Process shows the Steps executed in your test Case.
To run this Process again:

The Process starts again with a new Case.

Try running several Cases to try different choices at each Step.
Summary

You have used only some of Bonita Open Solution's functions, specifically:

The graphical interfaces of Bonita Studio, to create a complete Process by
- drawing Steps and assigning them both human and automatic Actors;
- adding global variables to the Process and local variables to Steps, which in turn have been used to create interactive forms;
  - defining string and enumerated list variables;
  - defining a Boolean variable;
- defining Conditions on Transitions to manage multiple output choices from a Step; and
- defining a Gate to manage multiple inputs to a Step.

The forms interface of Bonita User Experience:
- to Run a completed Process and entered information into the interactive forms created from your variables.

The e-mail like interface of Bonita User Experience:
- to Run an additional Case (or two, or several) of your Process.

If you explore a bit more in Bonita Open Solution, you will find other functionalities not addressed in this QuickStart - for example, in the Details for a Step, you can define Connectors to link to external databases and to messaging systems.

Feedback, Questions, and More Information

We welcome your feedback. Use the BonitaSoft Forum to let us have it! (www.bonitasoft.org/forum)

The BonitaSoft Forum is the place for your questions too. And check out our Bug Tracker, Source Code, and more. (www.bonitasoft.org/index.php)

Join the BonitaSoft Community and get our Newsletter, access to advance information, and more. (www.bonitasoft.com/community/join.php)

For more information, contact us at BonitaSoft. (www.bonitasoft.com/company/contact.php)

Have fun with Bonita!