Bonita Open Solution
Version 5.1

QuickStart Guide
Contents
Welcome to Bonita Open Solution! ................................................................. 4
Download, install, and launch Bonita Open Solution 5.0 ................................. 4
QuickStart Overview and Tutorial ............................................................... 4
  QuickStart Overview ............................................................................. 4
QuickStart Tutorial .................................................................................... 7
  Prepare to Design a Process Graphically in Bonita Studio ......................... 7
  Launch Bonita Studio ........................................................................... 8
Draw Steps and Transitions ........................................................................ 8
Create an Iteration and add an XOR gate ..................................................... 20
Add Conditions to Transitions .................................................................... 21
Add Details to Process/Steps ....................................................................... 25
Run a Process ............................................................................................ 31
Run a Process ............................................................................................ 31
Complete a Process Case .......................................................................... 35
Summary ................................................................................................. 39
Feedback, Questions, and More Information ................................................ 39

Figure 1. Welcome to Bonita Studio ............................................................ 4
Figure 2. Bonita Studio ready to design a new Process ................................. 5
Figure 3. Bonita User Experience provides an in-box to manage Processes and Cases 6
Figure 4. Completed Web Purchase Process ................................................. 7
Figure 5. Begin a new Process with a Start and a Step ................................... 8
Figure 6. Enter General Details for Sales Review ......................................... 8
Figure 7. Create a Group of Actors for Sales Review ................................... 9
Figure 8. Select the option to manually enter names for a User List ............... 9
Figure 9. Name the Group ....................................................................... 10
Figure 10. Define the Actors in this Group .................................................. 10
Figure 11. The newly created Group shows up in the Groups list for the Sales Review Step .......................................................... 11
Figure 12. Use the Context Palette to draw new elements on the Whiteboard ................................................................................................. 11
Figure 13. Name a new Step and enter its General Details ............................ 12
Figure 14. Define the Actors for this Step .................................................... 12
Figure 15. Select the Process Initiator as the Actor for this Step ................... 13
Figure 16. Add Reject Step and define its General Details ............................ 13
Figure 17. Add More Info Step and define its General Details ....................... 14
Figure 18. Choose the Group of Actors for More Info .................................... 14
Figure 19. Select the already defined Group Sales Employees ....................... 15
Figure 20. Rename this Pool ..................................................................... 16
Figure 21. Rename this Process Diagram .................................................... 16
Figure 22. Add Express Delivery Step and define its General Details .............. 17
Figure 23. Add Archive Step and define its General Details ......................... 18
Figure 24. Add an End and rearrange the Process elements on the Whiteboard ................................................................................................. 19
Figure 25. Add an XOR Gate ..................................................................... 20
Figure 26. Add Data to Details for Sales Review ......................................... 21
Figure 27. Define a list for Sales Review ...................................................... 22
Figure 28. Select a default value for the List........................................................................................................... 23
Figure 29. Newly created Data (variable) shows up in Data for this Step ................................................................. 23
Figure 30. Define Conditions for Transitions ........................................................................................................... 24
Figure 31. Transition Names appear on Whiteboard .................................................................................................. 24
Figure 32. Add Data to Details for Web Purchase Process (global variable)................................................................. 25
Figure 33. Define a list for Process (global list variable) ............................................................................................. 26
Figure 34. Select a default value for the list .................................................................................................................. 27
Figure 35. Newly created Data (variable) shows up in Data for the Process................................................................. 27
Figure 36. Add Data to Details for More Info .............................................................................................................. 28
Figure 37. Newly created Data (variable) shows up in Data for this Step ................................................................. 29
Figure 38. Add a Condition to a Transition .................................................................................................................. 30
Figure 39. Transition Names appear on Whiteboard .................................................................................................. 30
Figure 40. Web Purchase Process Case initial form (customer order form)................................................................. 31
Figure 41. Fill in Web Purchase Process customer order form to start a Case ............................................................. 31
Figure 42. Choose a Decision at Sales Review Step .................................................................................................. 32
Figure 43. Fill in form presented at More Info Step ..................................................................................................... 32
Figure 44. Fill in form presented (again, after iteration) at Sales Review Step .......................................................... 33
Figure 45. Fill in form presented at Pay Step .............................................................................................................. 33
Figure 46. Web Purchase Case completed .................................................................................................................. 34
Figure 47. Bonita User Experience with completed Web Purchase Process test Case .............................................. 35
Figure 48. Web Purchase Process test Case expanded ................................................................................................ 36
Figure 49. See the entire Case History with the Admin function ................................................................................... 37
Figure 50. Start another Case for the Web Purchase Process ........................................................................................ 38
Figure 51. Fill in Web Purchase Process customer order form to start a new Case .................................................... 38
Welcome to Bonita Open Solution!


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 5.1

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,
- 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

![Welcome to Bonita Studio](image)

Select **New** to create a new process

Open an existing .proc file

Import .bar files (created in BOS v5)

Open some examples

Figure 1. Welcome to Bonita Studio

You can also go directly to User Experience (👤 on the Tool Bar) where existing Processes and Cases are managed.
Bonita Open Solution 5.1 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 use the **Palette** to activate the **Tools** – click the element, drag to the **Whiteboard**
3. Define Details for the **selected element**, including:
   - **Name**
   - **Step Type** (Human, Automatic, Subprocess)
   - **Process** (global) and **Step** (local) **Data** variables
   - **Step Actors** (Group, Individual)
   - **Connectors** (to external systems)
   - **Transition Conditions** (if-then)
4. Click **Run** to deploy a completed **Process**
5. Click **User Experience** to start and manage **Process Cases**

**Figure 2.** Bonita Studio ready to design a new Process
Bonita User Experience:

Start Case starts New cases of each Process

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

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

![Completed Web Purchase Process](image)

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

Launch Bonita Studio and Select **New** to create a new Process. Bonita Studio will appear with a **Start** a first **Step**.

**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>Details</th>
<th>Sales Review</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Sales Review</td>
</tr>
<tr>
<td>Description</td>
<td>Sales employee receives order for processing</td>
</tr>
<tr>
<td>Activity Type</td>
<td>Human</td>
</tr>
<tr>
<td>Priority</td>
<td>Normal</td>
</tr>
</tbody>
</table>

![Figure 6. Enter General Details for Sales Review](image)
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 the initial step will be defined as the Process Initiator. For all other human (manual) steps, the Actor will be the admin (you). This will give you full access to test all interactive parts of the process, as if you were an end user, after you Run it.)

Click the Actors in Details for Sales Review:

![Select Group and Create](image)

Figure 7. Create a Group of Actors for Sales Review

Complete the wizards:

![Select Bonita and User List](image)

Figure 8. Select the option to manually enter names for a User List
Enter Name: Sales Employees
Enter Description: Employees authorized to handle web sales

Figure 9. Name the Group

Enter Users: admin, john, james, jack

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

Figure 11. The newly created Group shows up in the Groups list for the Sales Review Step

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.

Figure 12. Use the 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:

![Diagram showing how to name a new Step](image)

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

Click on Actors to define:

![Diagram showing how to define Actors](image)

**Figure 14.** Define the Actors for this Step
Now add the other 2 Steps connected to Sales Review. First, **Reject**. In **Details -> General**:

![Diagram showing the process with steps](image)

Figure 15. Select the Process Initiator as the Actor for this Step

![Diagram showing the process with steps](image)

Figure 16. Add **Reject** Step and define its General Details

<table>
<thead>
<tr>
<th>Enter</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Reject</td>
</tr>
<tr>
<td>Description</td>
<td>Request is rejected</td>
</tr>
<tr>
<td>Activity type</td>
<td>Automatic</td>
</tr>
</tbody>
</table>
Then, More Info. In Details -> General:

Figure 17. Add More Info Step and define its General Details

Then in Details -> Actors -> Group, select Choose:

Figure 18. Choose the Group of Actors for More Info
Complete the Assign Actors wizard:

![Assign Actors Wizard]

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

![Figure 20. Rename this Pool](image)

Rename the Process Diagram from **MyProcessDiagram** to **Web Purchase Diagram**. Click outside the Whiteboard Pool to deselect all elements. Click on **MyProcessDiagram -> Details -> General**:

![Figure 21. Rename this Process Diagram](image)
Save the Process. The Whiteboard tab is now labeled **Web Purchase Diagram** and the Pool is 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](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.

![Diagram](image)

**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.
Click and drag the individual elements in your Process to rearrange them if you wish. Unruly transition arrows can be moved manually by selecting the Transition, and unclicking the Automatic layout box in its Details.

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. In this simple tutorial example Process, the output will 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 will define how these inputs should be treated. Sales Review can proceed with either input, so an XOR Gate is needed.

Figure 25. Add an XOR Gate

Note: If there is no XOR gate to resolve multiple inputs, Bonita Open Solution treats them as XOR by default. The Step will take the first to arrive and proceed.
Add Conditions to Transitions

Note that Sales Review has 3 outputs, and each Case of the Process will follow only one of them. One way to define how a Process will “choose” to follow which path is to define specific Data in the Details of Sales Review. Then define a Condition for each Transition.

Select Sales Review and in its Details, add Data:

In the next wizard, define the Data type as a list, give it a name, and add the list items.
Add a new variable
Create a new variable for this process (global) or this task (local)

Name*: decision
( decision )

Description: Multiple options require a decision

Data type: List

Name*: Approval

Description: Multiple options require a decision

Add: Approve, Reject

List *
Add an item

Enter
Name: Decision
Description: Multiple options require a decision

Select
Data type: List
Name: (list): Approval
Description: Decision to approve, reject, or add more info
Add: Approve, Reject, and More Info

Figure 27. Define a list for Sales Review
Figure 28. Select a default value for the List

The list variable now shows in *Sales Review -> Details -> Data*.

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>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>→ if approved</td>
</tr>
<tr>
<td>General</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. Click and drag to move them if you wish.

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, beginning with Data, for the global Process Web Purchase. This information will be used to generate the form that the customer completes to begin the process. Global data is accessible to any Step in the Process; while local data is available only to the Step where it is defined.

Add 4 global Data variables: 3 Text and one List. Click on the Whiteboard, Select Web Purchase Details, select Data, then Add.

![Add a new variable dialog box](image)

**Enter**
- **Name**: Customer Name
- **Description**: Customer’s full name
- **Data type**: Text

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

Continue, and Add Customer Phone and Customer Email as Text variables.
For the last variable, add a List.

![Image of Add a new variable dialog box with fields filled for Promotional Products]

Figure 33. Define a list for Process (global list variable)

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

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

- **Add**
  - TV
  - Mobile phone
  - Laptop
Select the default:

![Image of Add a new variable dialog]

Figure 34. Select a default value for the list

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

![Image of Web Purchase Details]

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**

Then add **Data**:  

![Diagram showing a dialog box for adding a new variable with fields for Name, Description, Data type, and Default value.](image)

**Figure 36. Add Data to Details for More Info**
The new variable now shows in Details.

![Figure 37. Newly created Data (variable) shows up in Data for this Step](image)

**Pay**

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

Add 2 text variables:
- **Name**: Credit Card Number
- **Description**: Customer's Credit Card
- **Data type**: Text

and

- **Name**: Expiration Date
- **Description**: Card valid until
- **Data type**: Date
- **Default value**: Now

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
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**.

![Transition Details](image)

Figure 38. Add a Condition to a Transition

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.

![Process Diagram](image)

Figure 39. Transition Names appear on Whiteboard

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 series of status messages. The deployment is successful. Note that you are logged in as the Admin.

The Process can now run Step by Step. The forms are presented in the default Bonita Form and default Bonita Web Application, which you have not customized in this tutorial.

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 (Initiator) at the beginning of the Process and at Pay, and of the Sales Employee at Sales Review and More Info.)

Figure 41. Fill in Web Purchase Process customer order form to start a Case
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. Note that the Step candidates include the individuals you have identified as Sales Employees, plus the admin.

![Image of the Sales Review Step]

**Figure 42.** Choose a Decision at Sales Review Step

As “Sales Employee”: select More Info and Submit

![Image of the More Info Step]

**Figure 43.** Fill in form presented at More Info Step

As “Sales Employee”: enter additional information and Submit
As "Sales Employee": select Approve and Submit

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

As "Customer": Fill in Credit Card Number and Expiration Date, select Express Delivery and Submit

Figure 45. Fill in form presented at Pay Step

Note that at this step, the form would be presented to the Initiator, but by default the admin has access to activate it.
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.

Figure 47. Bonita User Experience with completed Web Purchase Process test Case
The **Web Purchase** Process shows the Steps executed in your test Case

Figure 48. **Web Purchase** Process test Case expanded
To see the entire Process, including Automatic Steps, Start, End, and Gates, go to Admin -> Cases on the left side of the window. Again click on Web Purchase to expand it.

Figure 49. See the entire Case History with the Admin function
To run this Process again:

![Bonita User Experience](image)

**Click the Case **Web Purchase** under **Start a case** to run another**

Figure 50. Start another Case for the **Web Purchase** Process

The Process starts again with a new Case.

![Bonita User Experience](image)

**Figure 51. Fill in **Web Purchase** Process customer order form to start 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 as Human or Automatic;
• assigning Actors to Human Steps;
• adding global variables to the Process and local variables to Steps, which in turn have been used to create interactive forms;
  o defining text and list variables;
  o 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 in an iteration.

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

The e-mail like interface of Bonita User Experience:
• to see the completed Case Steps;
• to consult the Case history
• 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; you can customize the way data is presented in Forms; and much more.

Feedback, Questions, and More Information

For an expanded explanation of the functionalities in Bonita Open Solution, see the Bonita Open Solution User Guide.

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!